

ECIA's Market Sentiment Index Average Hits Five-Year High in June Industry Pulse Survey

ECIA's Industry Pulse: Electronic Component Trends and Sentiment June 2026

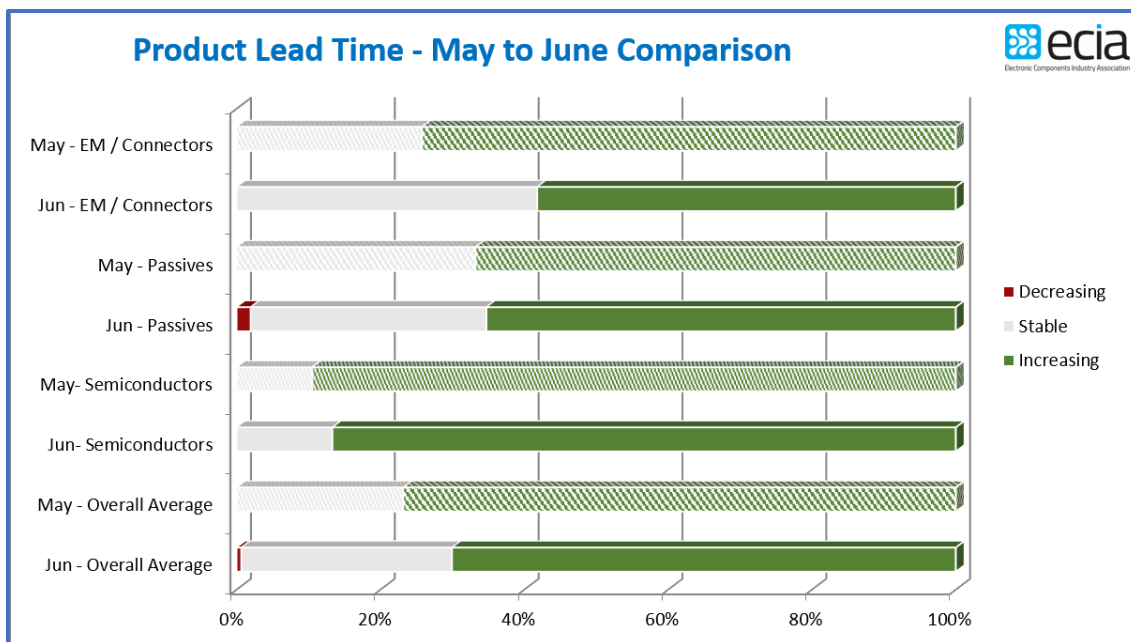
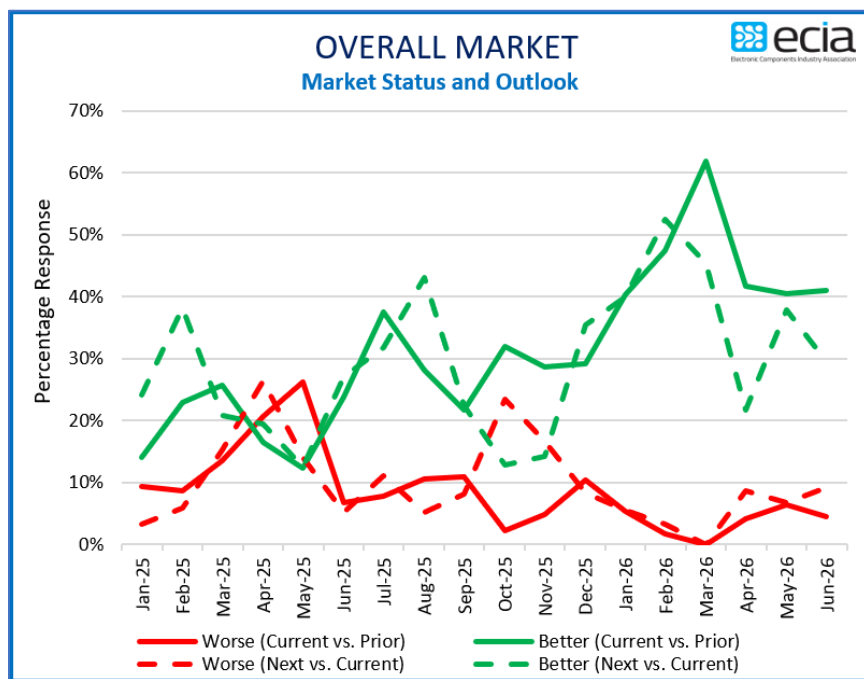
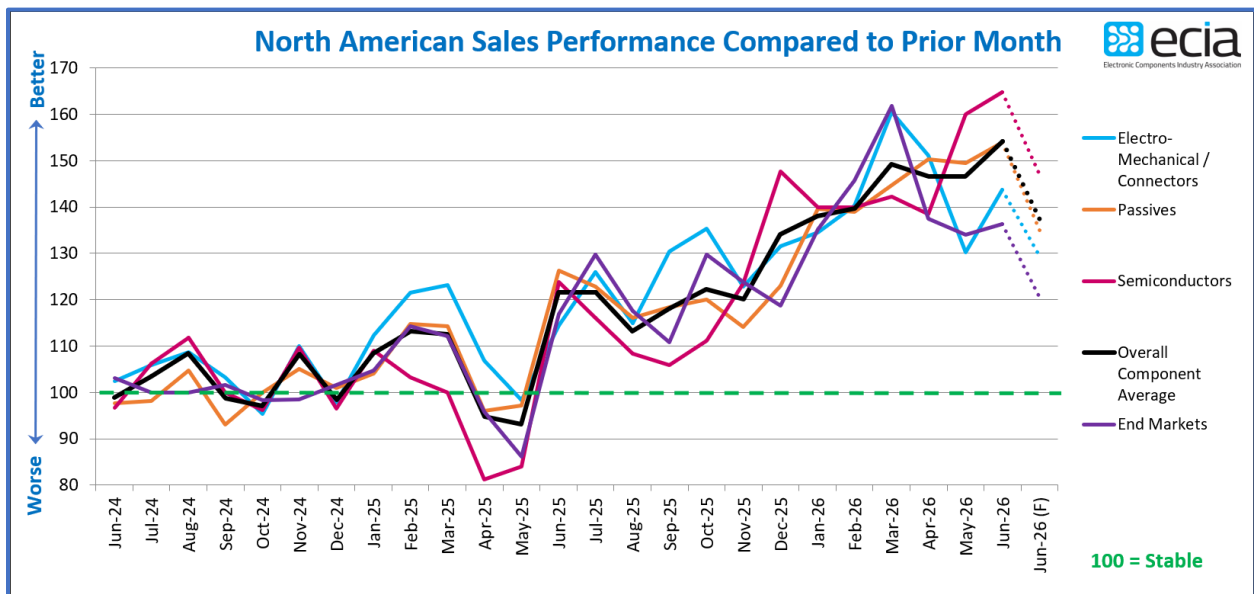
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The June market sentiment index average measured by ECIA's Industry Pulse survey hit a five-year high at 154.1. The all-time high in the average index was achieved more than five years ago, in March 2021, at 157.7. The June survey results are surprising, given that the June forecast in the May survey called for the average index to drop by over 15 points, to 131.1. The actual change between May and June in the average index was a 7.5-point improvement. However, in spite of the actual results in June compared to the forecast, survey participants continue to lack confidence in the future market direction. Once again, the forecast for the next month, July, predicts a drop of nearly 17 points, down to 137.2. The pessimism in the outlook is similar across all component categories, with the Passive component index outlook expectations dropping the most, a drop of 18.9 points in July. The smallest decline in the July outlook is 14.3 points in the Electro-Mechanical Component segment. It may be that the July outlook is primarily driven by expectations of a seasonal summer decline rather than concerns about the market itself. Also, to balance this analysis, it is important to note that the forecast component index averages range between 129 and 147 – very strong scores that are well above the 100-point threshold for growth expectation.

Manufacturer Representatives report an outlook that diverges sharply from the overall average July forecast. Expectations among this group project a stable average index with a July decline of only 3 points. By contrast, Manufacturers and Distributors are exceptionally pessimistic as they expect a severe drop of between 20 and 25 points. The overall average survey results for end-markets mirror the results for Components with a forecast decline of 15.9 points. Once again, the best news in the end-market section of the survey index is that all but two product sub-segments still come in strongly above the 100-point threshold for June and the July outlook. Only Consumer Electronics and Mobile Phones drop below 100 index points.

After many months of increasing lead time pressure, June reports indicate an easing in pressure as the overall average of respondents reporting increasing lead times decreased from 77% to 70% between May and June. Those reporting decreasing pressure continue to be negligible with only 2% reporting a decrease in Passive component lead time pressure. The strongest lead time pressure reported in the survey continues to be found in the Semiconductor segment, with 87% seeing increased lead times. Reports of increasing lead time pressure in the Semiconductor sub-segments range from 64% for Analog ICs to 89% for NAND Flash memory.

While significant concerns related to various economic indicators persist, the leaders in the authorized electronics components supply chain continue to express a very positive but cautious outlook.



The Industry Pulse survey provides highly valuable and detailed visibility on industry expectations in the near-term through the monthly and quarterly surveys. This “immediate” perspective is helpful to participants up and down the electronics components supply chain. In the long-term, ECIA shares in the optimism for the future as the continued introduction and market adoption of exciting innovative technologies should motivate both corporate and consumer demand for next-generation products over the long term.

The complete ECIA Industry Pulse Report is delivered to all ECIA members as well as others who participate in the survey. All participants in the electronics component supply chain are invited and encouraged to participate in the report so they can see the highly valuable insights provided by this report. The return on a small investment of time is enormous!

The monthly and quarterly Industry Pulse reports present data in detailed tables and figures with multiple perspectives and covering current sales expectations, sales outlook, product cancellations, product decommits and product lead times. The data is presented at a detailed level for six major electronic component categories, six semiconductor subcategories and eight end markets. Also, survey results are segmented by aggregated responses from manufacturers, distributors, and manufacturer representatives.