# ECIA’s August & Q3 Industry Pulse Sentiment Index Continues to Moderate from June & Q3 High

## *ECIA’s Industry Pulse: Electronic Component Trends and Sentiment August & Q3 2026*

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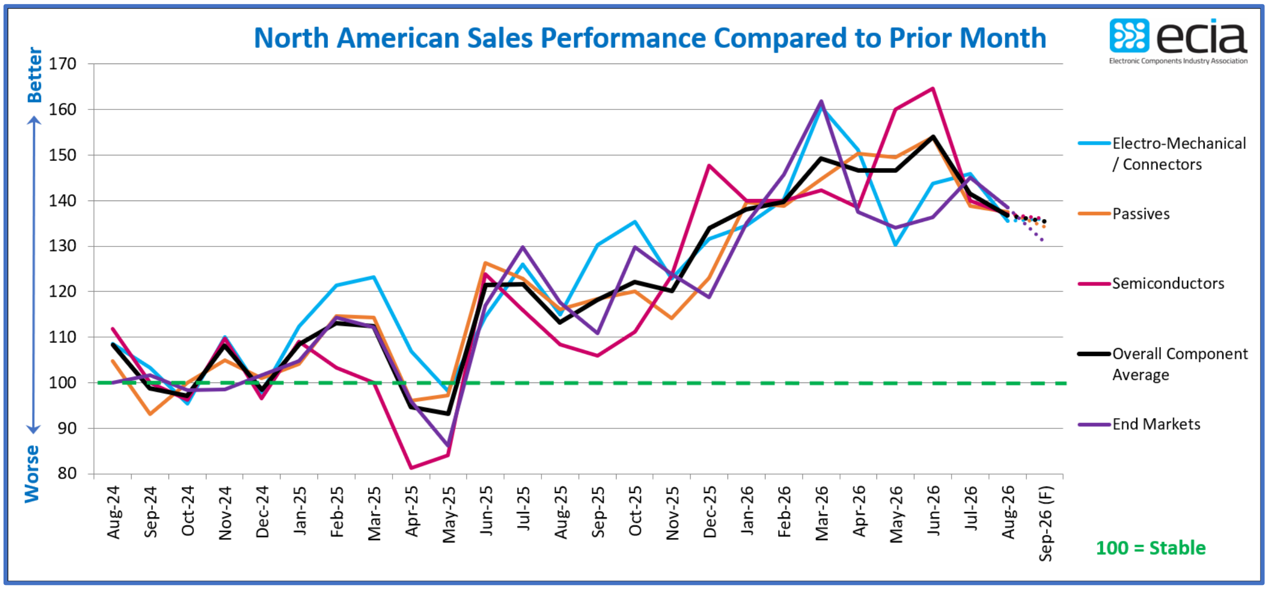
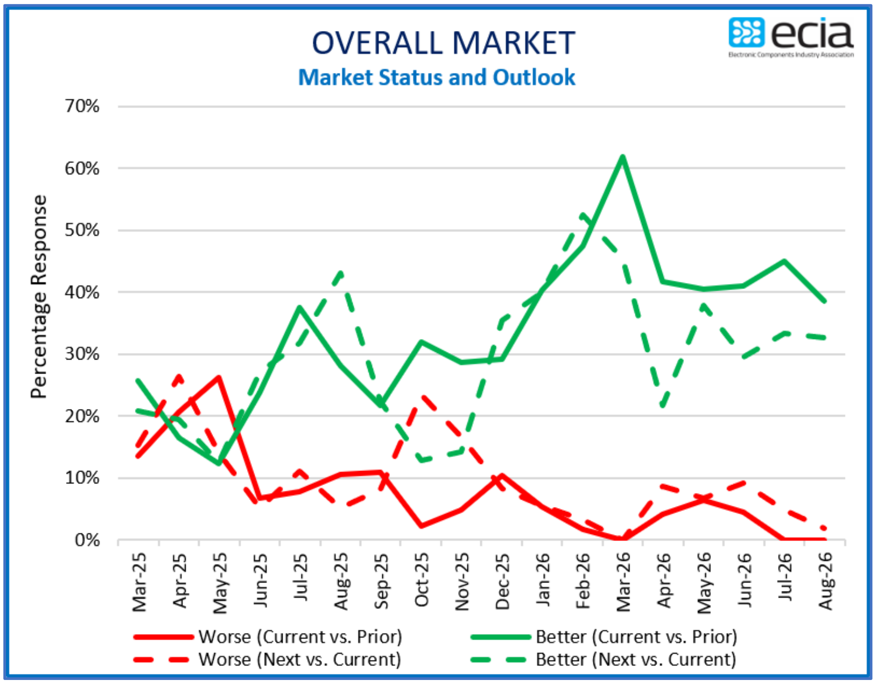
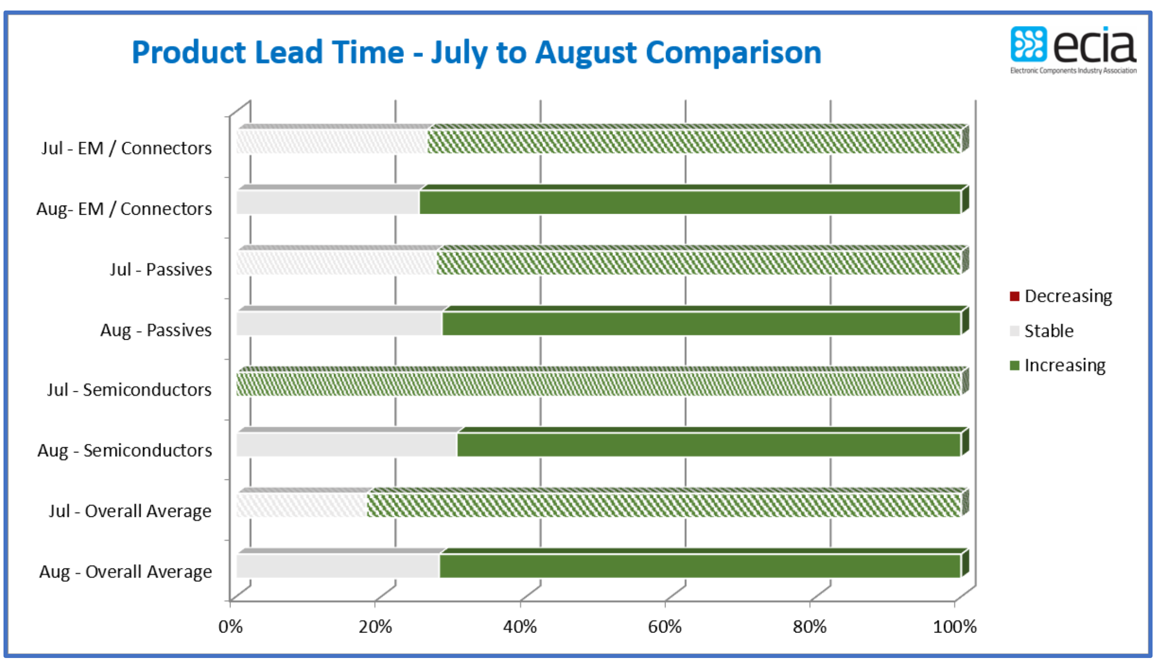
The ECIA Industry Pulse survey results reveal the continuation of a moderating trend that began in July. The overall average component index dropped by 4.9 points to 136.7. The overall index peaked in June at 154.1, so the index has fallen by 17.4 from its peak two months ago. Still, the August results are well above all scores for a period of 4.5 years prior to the recent upswing, from June 2021 to December 2025. The outlook for September from survey participants calls for overall sentiment to remain essentially flat month-to-month at 135.4. The results of the Q3 2026 Industry Pulse align with the August monthly results. The survey shows expectations of sales growth reaching a peak in Q3, with 80% of participants assessing growth compared to 70% seeing growth in Q2. In both Q2 and Q3, only 2% to 3% viewed a decline in market sentiment. Adding emphasis to the positive Q3 results, 31% see quarter-to-quarter growth topping 5% and 27% expecting growth between 3% and 5%. Similar to the August survey results, participants see a cooling in sentiment looking toward Q4, with 65% projecting quarter-to-quarter growth between Q3 and Q4. The monthly index scores for all three major component categories are essentially equal in August and the September forecast, ranging between 134.2 and 137.5. This same alignment is also found in the results from the quarterly survey, with 83% seeing growth in Semiconductors compared to Passive Components at 76%, only 7% behind. The results for end-market sentiment mirror the component scores as overall sentiment dropped from 145.0 in July to 138.5 in August. It is projected to fall another 7.7 points to 130.8 in September. The best news from the end-market survey results is the broad-based strength seen across all markets. Every market score is above the 100-point threshold, indicating growth in August, with the only exception being Mobile Phones. In September, even Mobile Phones reach the 100-point threshold. The survey results for sales sentiment from both the monthly and quarterly surveys present a highly positive picture of the current state of the market.

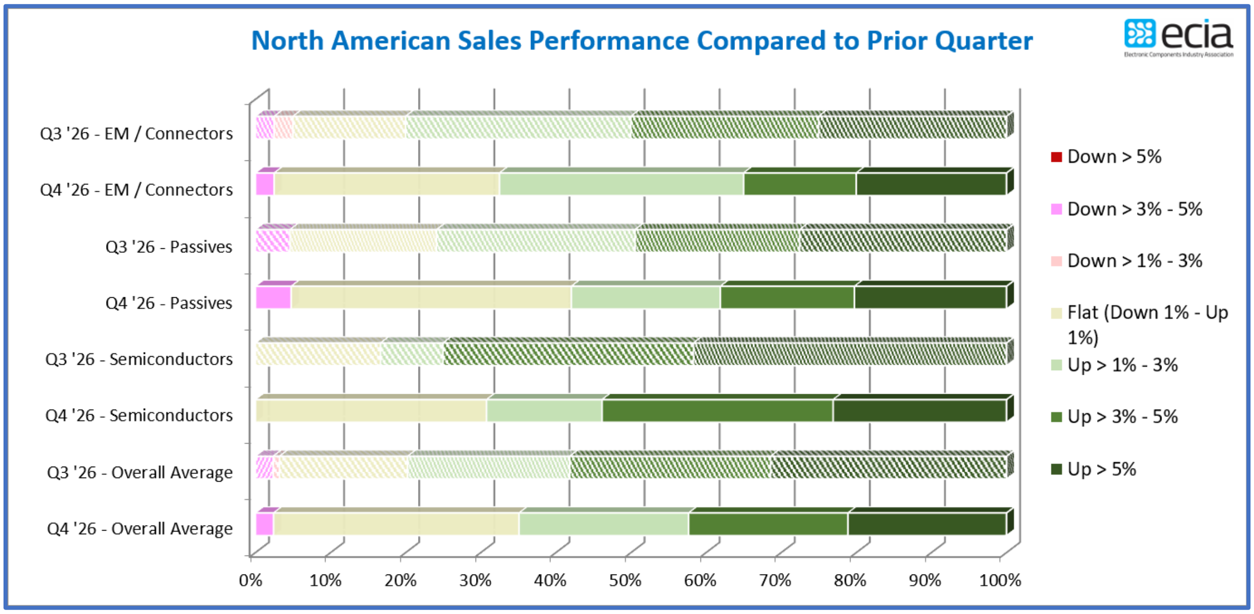
Manufacturers report the most positive results for both August and the September outlook. Distributors are much more pessimistic in August but match the overall sentiment in September. Manufacturer Representatives are modestly more positive than the overall average in August and then slip slightly below the average in the September forecast. The number of survey participants reporting increased lead time pressure continued to be extremely high, with 70% to 75% reporting increasing lead times across the three major component categories. There are no reports of decreasing lead times in any product category or sub-category in August. While much attention has been given to the pressure on lead times for DRAM and Data Flash Memory ICs, it is notable that lead time pressure is being experienced across all products.

Despite turbulent forces surrounding the market, the confidence among leaders in the authorized electronics components supply chain continues to be robust.


North American Sales Performance Compared to Prior Month
ecia
Electronic Components Industry Association
Better
Worse
170
160
150
140
130
120
110
100
90
80
Aug-24
Sep-24
Oct-24
Nov-24
Dec-24
Jan-25
Feb-25
Mar-25
Apr-25
May-25
Jun-25
Jul-25
Aug-25
Sep-25
Oct-25
Nov-25
Dec-25
Jan-26
Feb-26
Mar-26
Apr-26
May-26
Jun-26
Jul-26
Aug-26
Sep-26 (F)
Electro-Mechanical / Connectors
Passives
Semiconductors
Overall Component Average
End Markets
100 = Stable


OVERALL MARKET
Market Status and Outlook
ecia
Electronic Components Industry Association
Percentage Response
70%
60%
50%
40%
30%
20%
10%
0%
Mar-25
Apr-25
May-25
Jun-25
Jul-25
Aug-25
Sep-25
Oct-25
Nov-25
Dec-25
Jan-26
Feb-26
Mar-26
Apr-26
May-26
Jun-26
Jul-26
Aug-26
Worse (Current vs. Prior)
Worse (Next vs. Current)
Better (Current vs. Prior)
Better (Next vs. Current)


Product Lead Time - July to August Comparison
ecia
Electronic Components Industry Association
Jul - EM / Connectors
Aug- EM / Connectors
Jul - Passives
Aug - Passives
Jul - Semiconductors
Aug - Semiconductors
Jul - Overall Average
Aug - Overall Average
0%
20%
40%
60%
80%
100%
Decreasing
Stable
Increasing




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.