# ECIA's July Industry Pulse Sentiment Index Suffers Summer Slide and Dips 12.5 Points from June High

## *ECIA's Industry Pulse: Electronic Component Trends and Sentiment July 2026*

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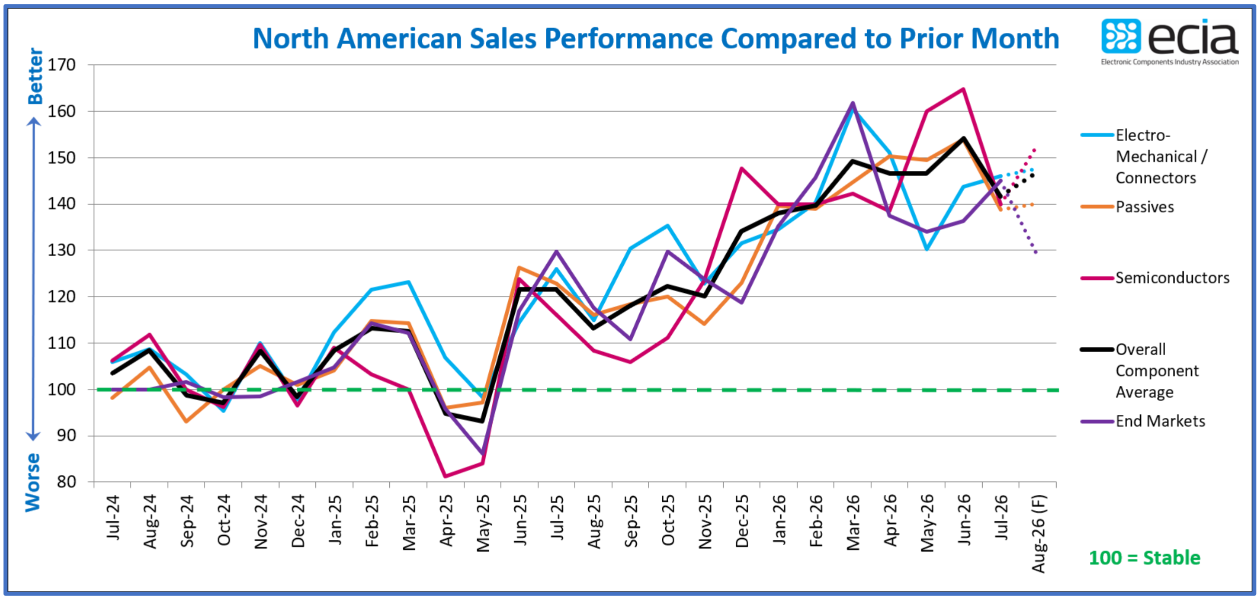
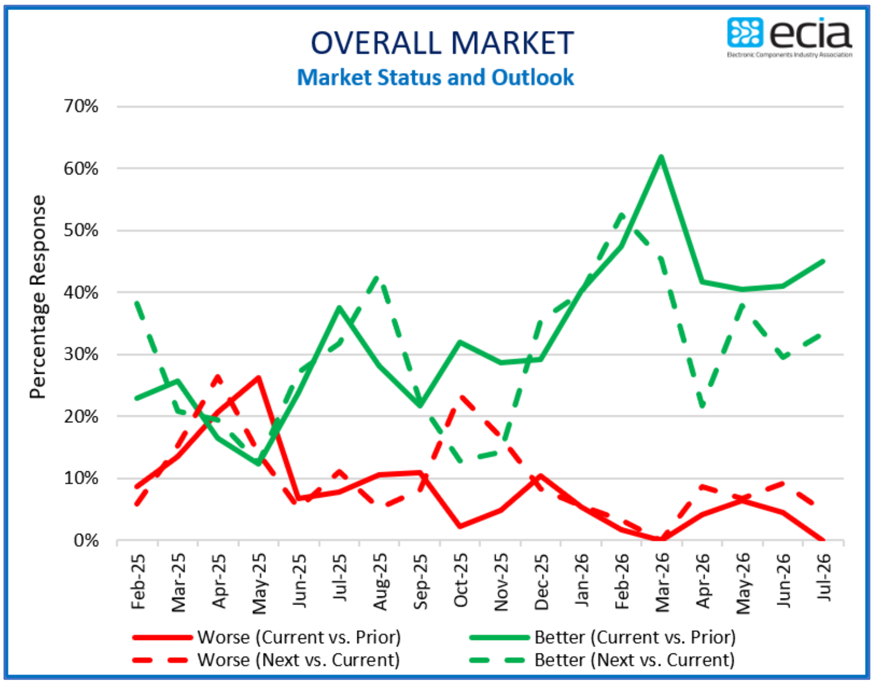
Following the five-year high registered by the June Industry Pulse survey, the July index fell by 12.5 points to 141.6. The good news is that the actual July results beat the expectations from the June survey by 4.4 points. A drop in July sentiment is not surprising given understandable summer softness. The July score is still eight points above the average index of the prior 12 months and 28 points above August 2025, the lowest point in the prior 12 months. While the prior projections in the April, May, and June surveys called for sharp next-month declines, the outlook for August anticipates stability as it projects a 5.3-point improvement to 146.9. The sentiment around Electro-Mechanical components is stable in both the July actual results and the August outlook, as the changes in both months are only about 2 points month-to-month. The Passive Components sentiment index fell by over 15 points between June and July but is projected to stabilize in August. Semiconductor market sentiment has exhibited volatile behavior in recent months. Following a dramatic jump in scores between April and June, the index score plunged by nearly 25 points to 140.0 in July. Looking toward August, a strong rebound of nearly 13 points to 152.9 points is expected. Also, to balance this analysis, it is important to note that the average component index averages have trended solidly upward since passing the 100-point index growth threshold in May 2025. An average index above 133 points over the past 13 months demonstrates strong ongoing confidence in the market.

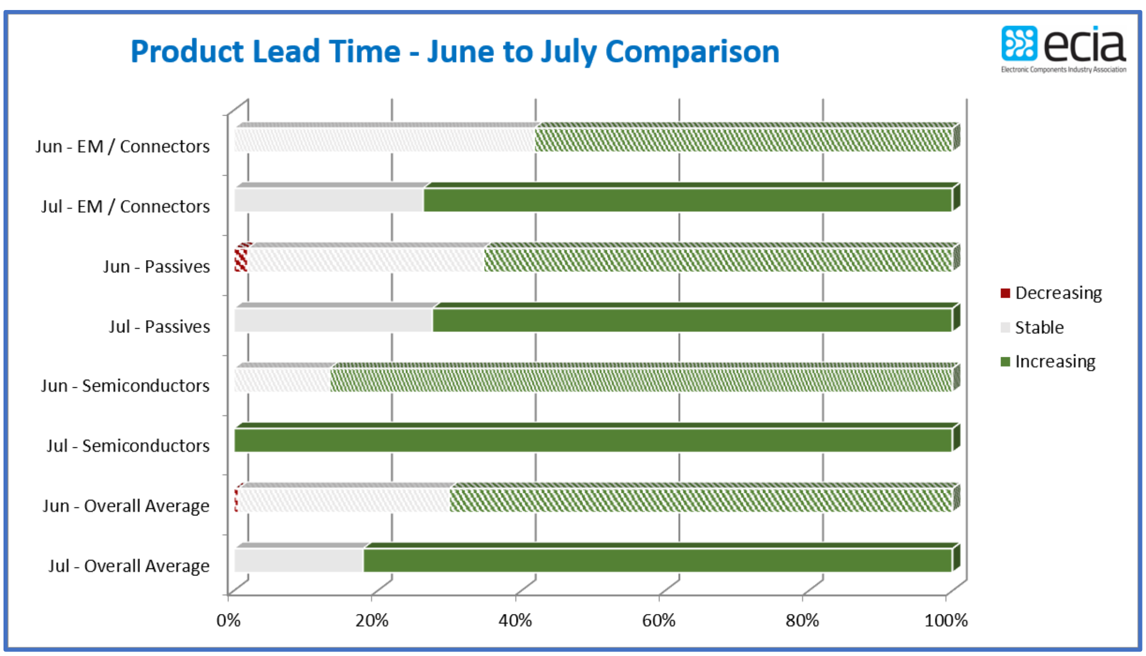
Manufacturer Representatives and Distributors report index scores in the past two months that are fairly aligned with the overall average scores. By contrast, Manufacturers are exceptionally pessimistic by comparison. The overall average survey results for end-markets in May and June were significantly below the results for Components. In June they came into close alignment. However, in the August outlook the end-market expectations fall more than 18 points below the overall component projection. Despite this difference, the best news in the end-market section of the survey is that all but two product sub-segments still come in strongly above the 100-point threshold for June, July, and the August outlook. Only Consumer Electronics and Mobile Phones lag by comparison but still score at or above 100 index points in August expectations.

Lead time pressure rebounded with a vengeance in July. Following a slight easing in June compared to May, the July results report a 12% increase in the number of participants reporting increasing lead times, jumping to 82% overall. Increasing lead times for Semiconductors were reported by 100% of participants in July. Those reporting decreasing pressure dropped to 0% in every major category in July. reporting a decrease in Passive component lead time pressure. In the sub-categories, only Analog/Linear ICs had reports of decreasing lead times - but only 6% reported decreasing pressure.

The confidence among leaders in the authorized electronics components supply chain continues to be impressive even in the midst of ongoing economic concerns.


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
Jul-24
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 (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%
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
Worse (Current vs. Prior)
Worse (Next vs. Current)
Better (Current vs. Prior)
Better (Next vs. Current)


Product Lead Time - June to July Comparison
ecia
Electronic Components Industry Association
Jun - EM / Connectors
Jul - EM / Connectors
Jun - Passives
Jul - Passives
Jun - Semiconductors
Jul - Semiconductors
Jun - Overall Average
Jul - 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.