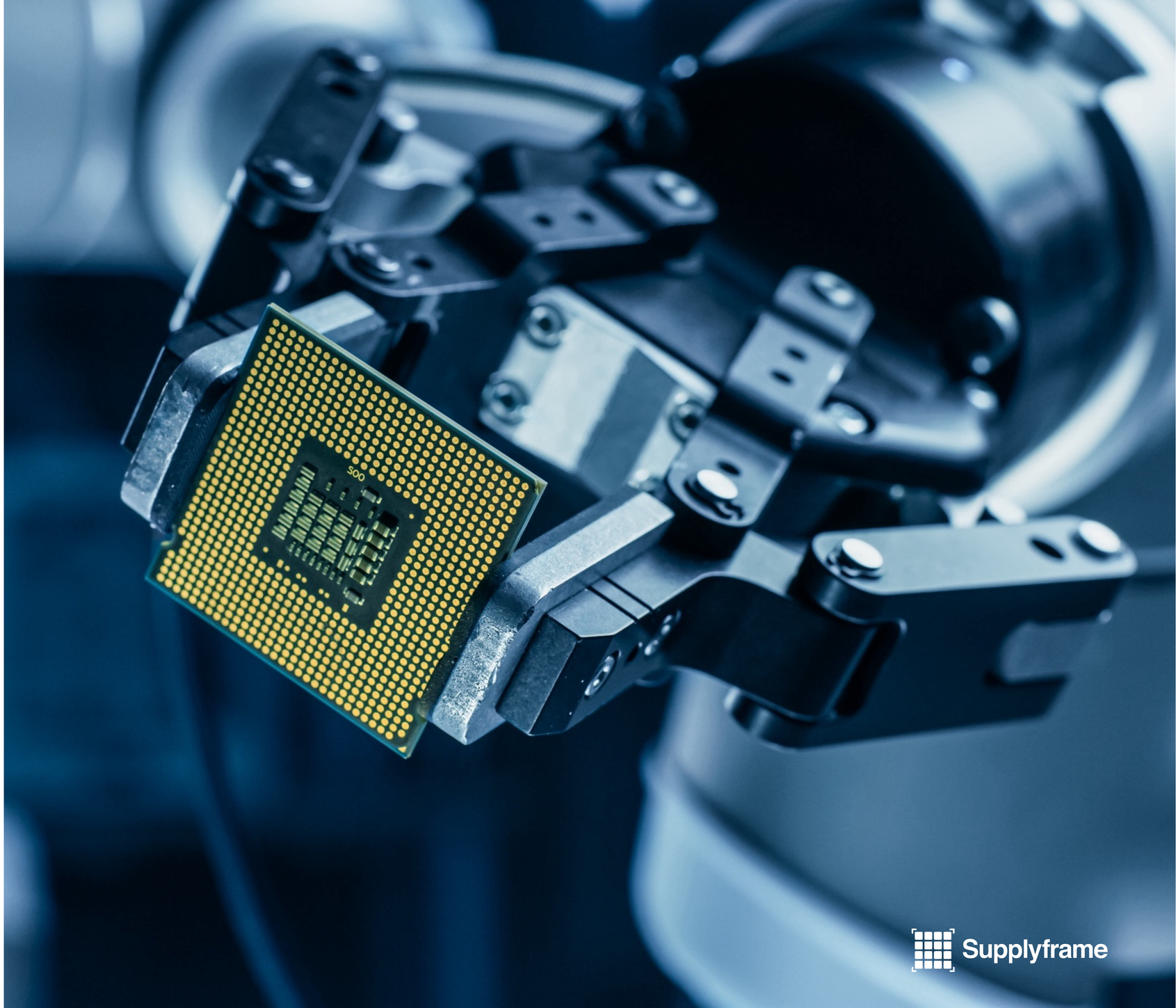
Supplyframe
Design-to-Source
Intelligence

Design-to-Source Monthly Insights

January 2025



Methodology

The following report was compiled using data available from Supplyframe's Design to Source Intelligence (DSI) Network. The DSI Network consists of more than 70+ web properties, attracting 11M+ engineers and procurement professionals from around the world on a monthly basis. Engineers and procurement professionals visit and interact with the DSI Network specifically for their work (research, consider, design, and buy), enabling Supplyframe to understand design trends, sourcing trends, and extrapolate indicators of overall market conditions and trends.

What this report provides the advertiser?

1. A proxy for *"market"* condition by evaluating trends in engineering design activities and procurement sourcing activities
2. Understand what product categories are in demand by engineers and buyers
3. Anticipate future sourcing demand based on where design activities are concentrated (categories and regions)

Customers can leverage the insights provided in this report to support the development of their Go-To-Market strategy, as well as campaign planning and execution to drive their organization's objectives.

To protect sensitive information, as well as provide a mechanism for insights - we have normalized and indexed much of the data used in this analyses. There are two specific indices utilized to provide trend and comparative insights:

Design Activity Index

Based on part level activity by engineers on the DSI Network. Activities included are related to part evaluation and part placement in designs via EDAs. Activities, are normalized, weighted, and scored on a scale of 0 – 100.

Index scores are relative to the dimensions of data being included in the analyses (ie. Country, manufacturer, categories). A value of 100 reflects maximum volume of activities in the given data set. A value of 50 reflects half of the maximum value in the given data set.

Sourcing Activity Index

Based on part level activity by buyers on the DSI Network. Activities included are related to buy clicks on the the DSI Network. Index is scored on a scale of 0 – 100.

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What We Saw Across The Network

JANUARY 2025

- Global design and sourcing activities both increased month-over-month in January following seasonal trends. Growth was driven by the EMEA and Americas regions, while the APAC region observed decrease in activities due to the Lunar New Year holiday.

- Global design activities increased +10% month-over-month and +6% year-over-year. Increase in activities were observed across the following key markets for electronics design and manufacturing: Germany, France, the United Kingdom, Sweden, Netherlands, Italy, the United States, Canada, Mexico, and Brazil. In the APAC region, design activities increased in India, South Korea, and Australia.

- Top product categories that observed increases in design activities across all regions included: power circuits, resistors, transistors, and diodes.

- Global sourcing activities increased +5% month-over-month but continued to remain below same period last year. Growth in sourcing activities were observed across the following key markets: Germany, France, Italy, the United Kingdom, Spain, Poland, Sweden, the United States, Canada, Mexico, Brazil, India, Thailand, Indonesia, and Japan.

- Top product categories that observed growth in sourcing activities across both the EMEA and Americas regions included: power circuits and optoelectronics. Other product categories that observed growth in demand in at least one of the two regions also included: transistors, drivers and interfaces, diodes, terminal blocks and capacitors. In the APAC region, connectors, optoelectronics, terminal blocks, and diodes observed growth in demand.

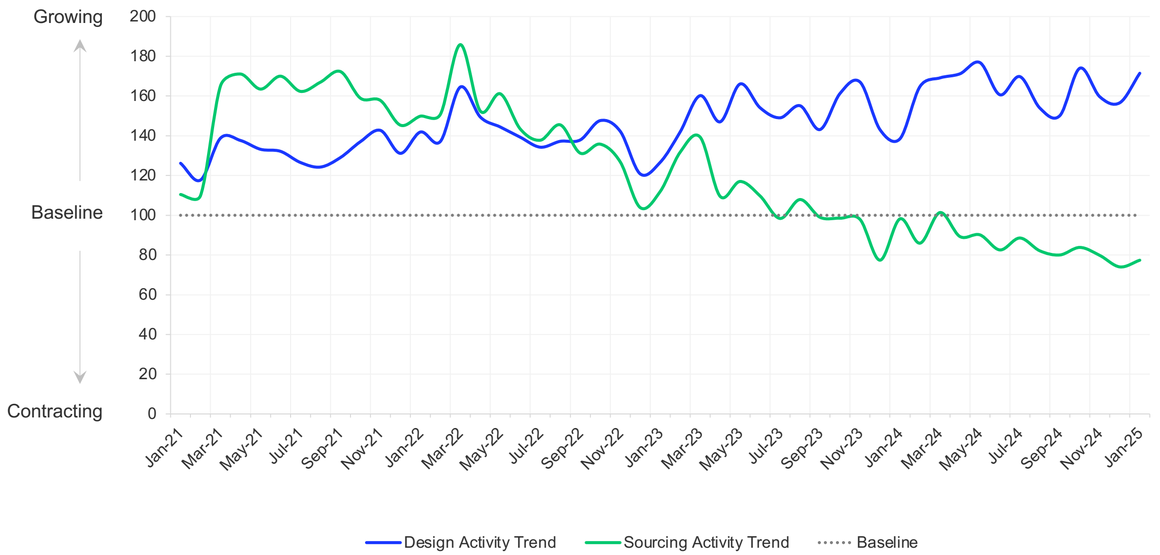
- We continued to observe large volume of design and sourcing activities focused on the following verticals: computer equipment, industrial control and automation, and automotive.

- Calendar Q1 projections remain unchanged: global design activities are expected to increase +6% quarter-over-quarter, while global sourcing activities are expected to increase +4% to +5%.

Global Performance

Design Activities	⩓	**+9.5% M/M**
	⩓	**+5.5% Y/Y**
Sourcing Activities	⩓	**+4.6% M/M**
	⩔	**-21.2% Y/Y**

Chart 1. Design and Sourcing Activity Trends



How to read this chart:
Design and sourcing activities have been baselined to 2020 monthly median. Baseline is indicated as a value of 100. Above the baseline indicates growth, while below the baseline indicates decrease in activities.

Design Activity Overview

JANUARY 2025

Design Activity Index

Based on part level activity by engineers on the DSI Network. Activities included are related to part evaluation and part placement in designs via EDAs. Activities, are normalized, weighted, and scored on a scale of 0 – 100.

Index scores are relative to the dimensions of data being included in the analyses (ie. Country, manufacturer, categories). A value of 100 reflects maximum volume of activities in the given data set. A value of 50 reflects half of the maximum value in the given data set.

Global design activities increased +10% month-over-month and +6% year-over-year.

- Global design activities aligned to seasonal trends for January 2025. Activity grew in the EMEA and Americas region, while it decreased in the APAC region.

- In the EMEA region, increases in design activities were observed across all the top countries: Germany (+31%); United Kingdom (+30%); France (+28%); Italy (+13%); Netherlands (+4%); and Sweden (+4%). Engineer demand for components increased across all product categories in these countries, but the following product categories observed the largest increase in design activities over the last 6 months: power circuits, resistors, diodes, terminal bocks, and transistors.

- In the Americas region, the following countries observed the largest increase in design activities: United States (+21%); Canada (+75%); Brazil (+25%); and Mexico (+25%). In these countries, the following product categories observed the largest increases in activities over the last 6 months: resistors, capacitors, power circuits, diodes, and transistors.

- In the APAC region, design activities increased in India (+11%); South Korea (+13%); and Australia (+14%). In these countries, the following product categories observed the largest increases in activities over the last 6 months: capacitors, power circuits, resistors, diodes, and transistors. Design activities decreased month-over-month in China and Taiwan following seasonal trends that align to Lunar New Year celebrations.

Table 1. Design Activity Summary

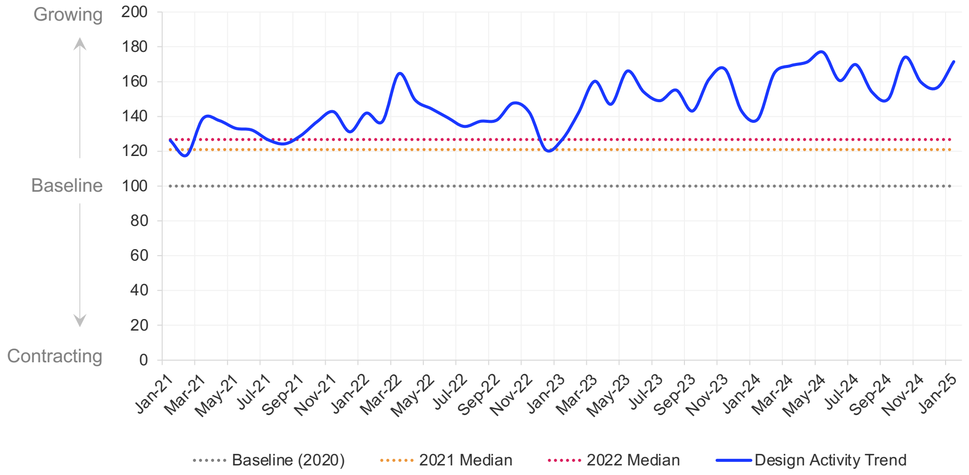
	vs. Prior Month	vs. Prior Year	6mo. CMGR
Global	9.5%	5.5%	0.2%

Region	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
EMEA	100.0	13.2%	8.3%	1.4%
APAC	62.5	-4.4%	-0.3%	-2.7%
AMER	47.0	24.7%	7.7%	2.0%

Top 10 Countries / Territories

Country / Territory	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	21.2%	5.2%	2.1%
India	56.1	10.7%	44.5%	2.0%
Germany	50.4	30.8%	12.7%	1.8%
China (incl. Hong Kong)	41.0	-25.5%	-30.7%	-6.9%
United Kingdom	28.0	30.2%	-0.9%	-0.2%
France	28.0	27.7%	19.2%	3.2%
Italy	25.0	13.2%	18.8%	1.4%
Republic of Korea	20.7	13.4%	3.6%	-1.1%
Turkey	20.0	-9.3%	31.3%	3.6%
Canada	17.6	74.6%	49.7%	6.9%

Chart 2. Global Design Activity Trends



Design Activity: Americas Trends

JANUARY 2025

Design Activity Index

Based on part level activity by engineers on the DSI Network. Activities included are related to part evaluation and part placement in designs via EDAs. Activities, are normalized, weighted, and scored on a scale of 0 – 100.

Index scores are relative to the dimensions of data being included in the analyses (ie. Country, manufacturer, categories). A value of 100 reflects maximum volume of activities in the given data set. A value of 50 reflects half of the maximum value in the given data set.

Following data provides a breakdown of design activities across the DSI Network in the Americas region.

Chart 3. Americas Design Activity Trends

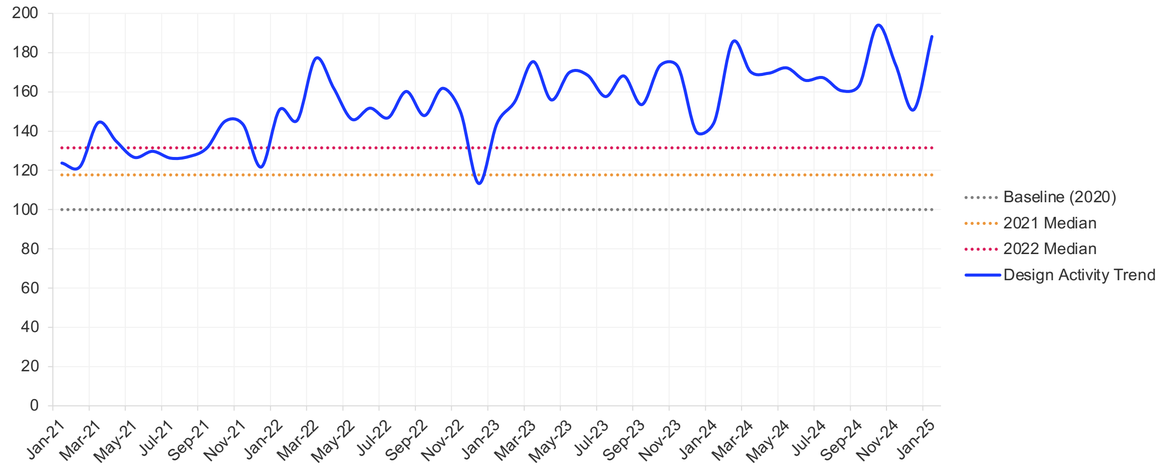


Table 2. Top 15 Product Categories in Americas

Product Class	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	28%	2%	1%
Resistors	63.6	42%	16%	5%
Capacitors	60.8	21%	9%	3%
Power Circuits	58.1	33%	7%	2%
Diodes	38.9	31%	4%	2%
Transistors	28.6	28%	1%	3%
Optoelectronics	23.0	28%	1%	0%
Microcontrollers and Processors	20.9	18%	0%	0%
Inductors	20.3	25%	14%	2%
Terminal Blocks	19.3	22%	-10%	1%
Drivers And Interfaces	16.8	38%	-5%	1%
Logic	15.1	18%	13%	3%
Switches	13.8	11%	2%	1%
Signal Circuits	13.6	17%	4%	2%
Amplifier Circuits	12.8	-1%	-17%	0%

Design Activity: EMEA Trends

JANUARY 2025

Design Activity Index

Based on part level activity by engineers on the DSI Network. Activities included are related to part evaluation and part placement in designs via EDAs. Activities, are normalized, weighted, and scored on a scale of 0 – 100.

Index scores are relative to the dimensions of data being included in the analyses (ie. Country, manufacturer, categories). A value of 100 reflects maximum volume of activities in the given data set. A value of 50 reflects half of the maximum value in the given data set.

Following data provides a breakdown of design activities across the DSI Network in the EMEA region.

Chart 4. EMEA Design Activity Trends

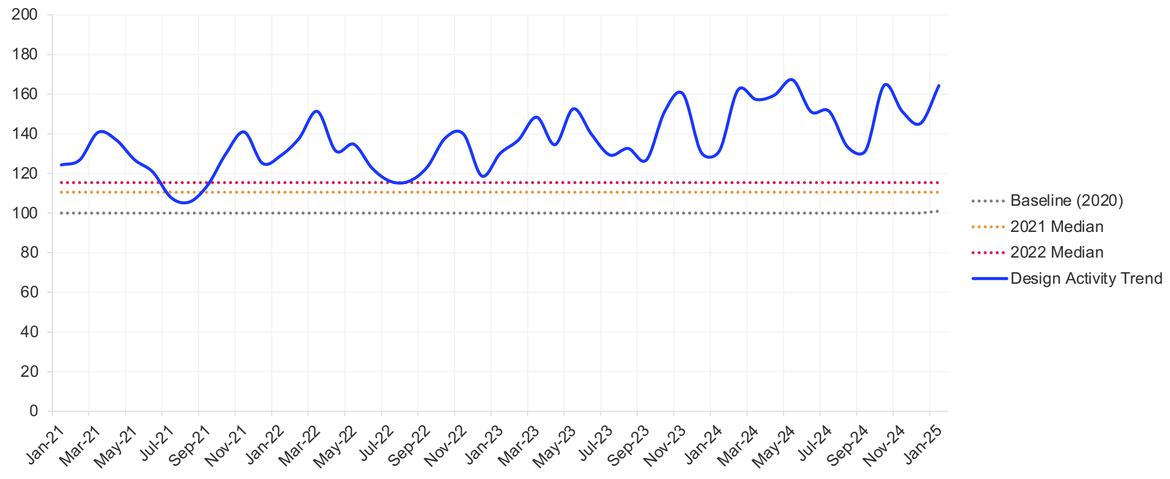


Table 3. Top 15 Product Categories in EMEA

Product Class	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	16%	7%	0%
Power Circuits	62.1	13%	6%	1%
Capacitors	58.1	7%	17%	2%
Resistors	53.1	9%	13%	1%
Diodes	41.9	9%	4%	1%
Transistors	30.9	14%	2%	3%
Terminal Blocks	28.0	30%	5%	3%
Microcontrollers and Processors	27.0	19%	6%	1%
Inductors	23.8	5%	5%	0%
Optoelectronics	23.7	11%	-4%	2%
Drivers And Interfaces	19.1	11%	1%	1%
Amplifier Circuits	15.1	6%	-2%	0%
Signal Circuits	14.9	16%	2%	2%
Logic	14.7	6%	-5%	1%
Switches	14.1	21%	3%	2%

Design Activity: APAC Trends

JANUARY 2025

Design Activity Index

Based on part level activity by engineers on the DSI Network. Activities included are related to part evaluation and part placement in designs via EDAs. Activities, are normalized, weighted, and scored on a scale of 0 – 100.

Index scores are relative to the dimensions of data being included in the analyses (ie. Country, manufacturer, categories). A value of 100 reflects maximum volume of activities in the given data set. A value of 50 reflects half of the maximum value in the given data set.

Following data provides a breakdown of design activities across the DSI Network in the APAC region.

Chart 5. APAC Design Activity Trends

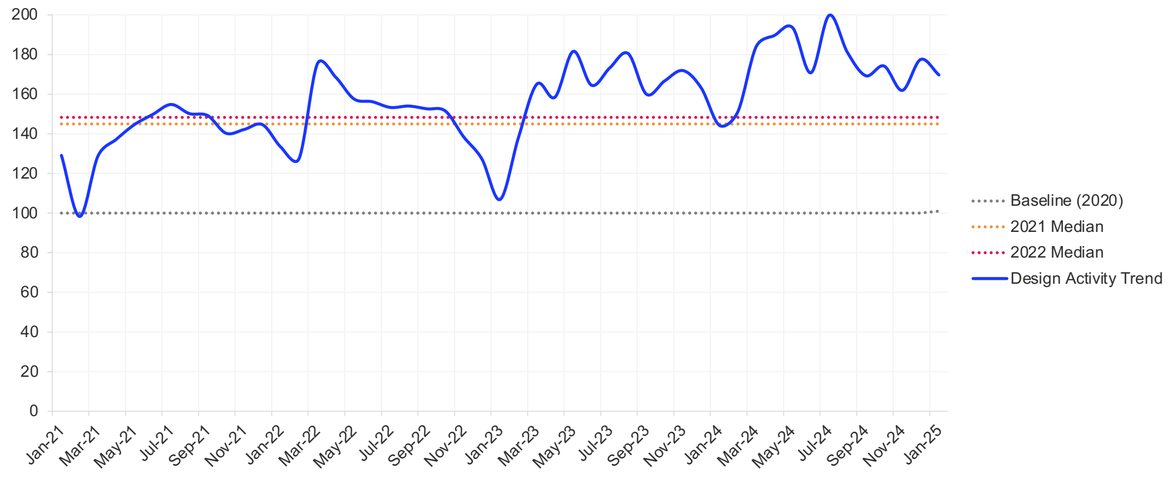


Table 4. Top 15 Product Categories in APAC

Product Class	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-5%	-2%	-3%
Capacitors	73.5	1%	6%	-2%
Power Circuits	71.1	-11%	-3%	-5%
Resistors	64.4	5%	9%	0%
Diodes	57.3	1%	0%	-1%
Transistors	37.3	-8%	-4%	-3%
Microcontrollers and Processors	30.0	-13%	-17%	-5%
Optoelectronics	26.4	13%	-5%	-2%
Inductors	24.7	-6%	-2%	-2%
Amplifier Circuits	23.9	-4%	-1%	-4%
Drivers And Interfaces	22.4	-15%	-16%	-4%
Logic	18.6	-14%	-7%	-4%
Signal Circuits	17.4	-9%	-17%	-4%
Filters	16.5	6%	11%	-2%
Terminal Blocks	16.3	-3%	3%	-5%

Sourcing Activity Overview

JANUARY 2025

Sourcing Activity Index

Based on part level activity by buyers on the DSI Network. Activities included are related to buy clicks on the the DSI Network. Index is scored on a scale of 0 – 100.

Index scores are relative to the dimensions of data being included in the analyses (ie. Country, manufacturer, categories). A value of 100 reflects maximum value in the given data set. A value of 50 reflects half of the maximum value in the given data set.

Global sourcing activities increased month-over-month but continued to trend below same period last year.

- Global sourcing activities followed seasonal trends in January 2025. Compared to prior month, sourcing activities increased in the EMEA and Americas region, while it decreased in the APAC region due to the Lunar New Year holiday.

- In the EMEA region, sourcing activities increased across all key markets: Germany (+22%); France (+26%); Italy (+49%); United Kingdom (+27%); Spain (+14%); Poland (+39%); and Sweden (+57%). In these countries, sourcing activities increased for all product categories except diodes which observed a month-over-month decrease. Over the last 6 months, the following product categories observed the most improvement in sourcing demand: power circuits, transistors, optoelectronics, drivers and interfaces, and diodes.

- In the Americas region, the following countries observed the largest increase in sourcing activities: United States (+31%); Canada (+52%); Mexico (+68%); and Brazil (+13%). In these countries, all product categories observed month-over-month increase in sourcing activities. The following product categories observed the largest increases in demand over the last 6 months: power circuits, terminal blocks, optoelectronics, and capacitors.

- In t he APAC region, the following countries observed month-over-month increase in sourcing activities: India (+10%); Thailand (+41%); Indonesia (+17%); and Japan (+1%). In these countries, all product categories observed month-over-month increase in sourcing activities. Over the last 6 months, the following product categories observed the largest increases in sourcing demand from these countries: connectors, optoelectronics, terminal blocks, and diodes.

Table 5. Sourcing Activity Summary

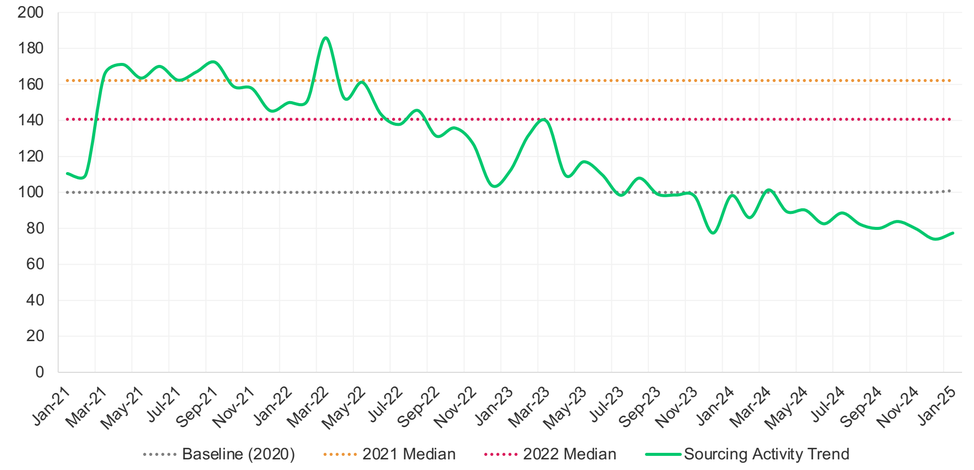
	vs. Prior Month	vs. Prior Year	6mo. CMGR
Global	4.6%	-21.2%	-2.2%

Region	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
APAC	100.0	-15.6%	-31.8%	-4.9%
AMER	78.4	33.0%	-3.3%	0.9%
EMEA	43.0	25.5%	-19.4%	-0.4%

Top 10 Countries / Territories

Country / Territory	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	31%	-5%	1%
China (incl. Hong Kong)	65.9	-32%	-48%	-8%
India	35.2	10%	3%	1%
Republic of Korea	21.4	-3%	-26%	-4%
Germany	16.0	22%	-21%	-1%
Canada	11.8	52%	-3%	2%
Taiwan	11.2	-19%	-30%	-4%
Malaysia	8.9	-6%	-4%	-4%
Mexico	7.7	68%	5%	2%
Singapore	7.0	-9%	-21%	-4%

Chart 6. Global Sourcing Activity Trends



Sourcing Activity: Americas Trends

JANUARY 2025

Sourcing Activity Index

Based on part level activity by buyers on the DSI Network. Activities included are related to buy clicks on the the DSI Network. Index is scored on a scale of 0 – 100.

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Following data provides a breakdown of sourcing activities across the DSI Network in the Americas region.

Chart 7. Americas Sourcing Activity Trends

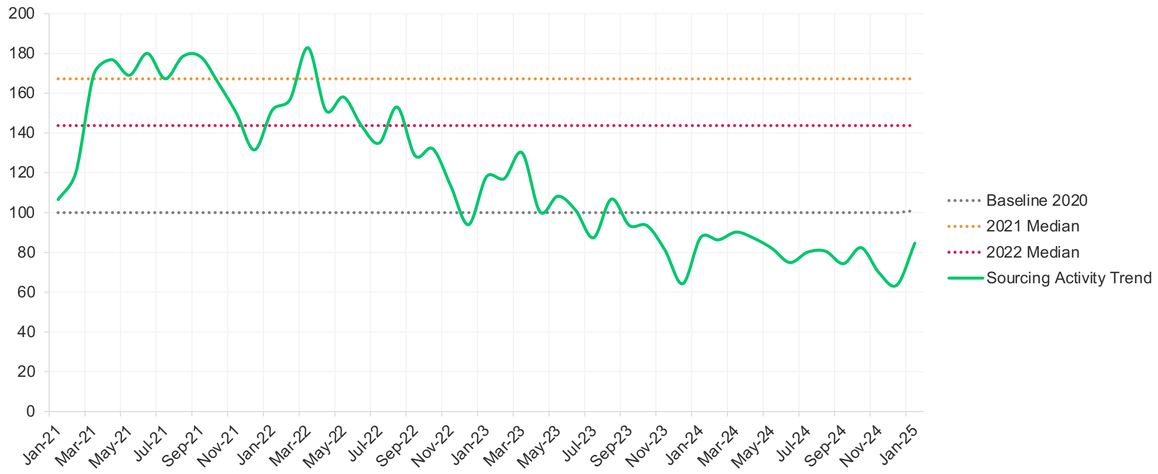

Table 6. Top 15 Product Categories in Americas

Product Class	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	31%	3%	1%
Capacitors	79.5	33%	2%	1%
Resistors	68.7	37%	1%	1%
Power Circuits	43.2	24%	-1%	2%
Connector Support	38.0	42%	10%	2%
Diodes	33.5	32%	-13%	0%
Transistors	25.7	31%	-18%	0%
Terminal Blocks	22.2	41%	8%	2%
Optoelectronics	19.5	36%	4%	3%
Microcontrollers and Processors	18.2	29%	-17%	0%
Inductors	16.9	34%	-18%	0%
Amplifier Circuits	13.6	44%	-12%	-2%
Drivers And Interfaces	11.4	24%	-19%	-1%
Logic	11.0	14%	-24%	-2%
Switches	10.4	43%	10%	3%

Sourcing Activity: EMEA Trends

JANUARY 2025

Sourcing Activity Index

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Following data provides a breakdown of sourcing activities across the DSI Network in the EMEA region.

Chart 8. EMEA Sourcing Activity Trends

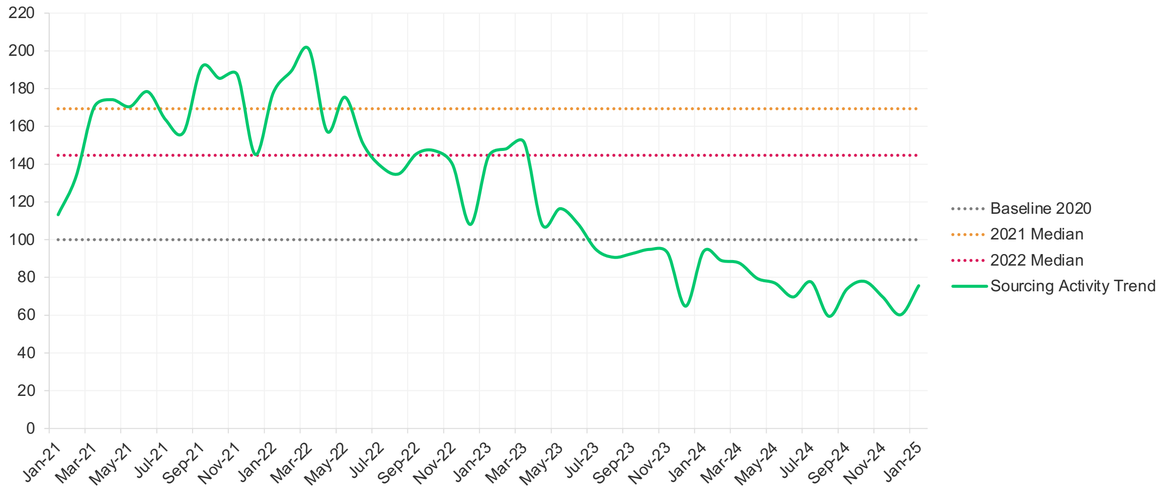

Table 7. Top 15 Product Categories in EMEA

Product Class	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	24%	-13%	0%
Capacitors	95.1	32%	-15%	-2%
Resistors	78.3	22%	-11%	-1%
Power Circuits	68.8	30%	-21%	0%
Diodes	52.7	1%	-24%	0%
Transistors	47.5	23%	-24%	1%
Microcontrollers and Processors	38.6	24%	-29%	-1%
Amplifier Circuits	36.9	23%	0%	-1%
Optoelectronics	30.3	37%	-14%	1%
Connector Support	29.1	26%	-15%	-1%
Inductors	26.0	37%	-33%	-1%
Drivers And Interfaces	24.0	33%	-31%	0%
Logic	17.1	24%	-32%	-1%
Filters	17.0	36%	-21%	0%
Terminal Blocks	16.8	28%	-6%	0%

Sourcing Activity: APAC Trends

JANUARY 2025

Sourcing Activity Index

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Following data provides a breakdown of sourcing activities across the DSI Network in the APAC region.

Chart 9. APAC Sourcing Activity Trends

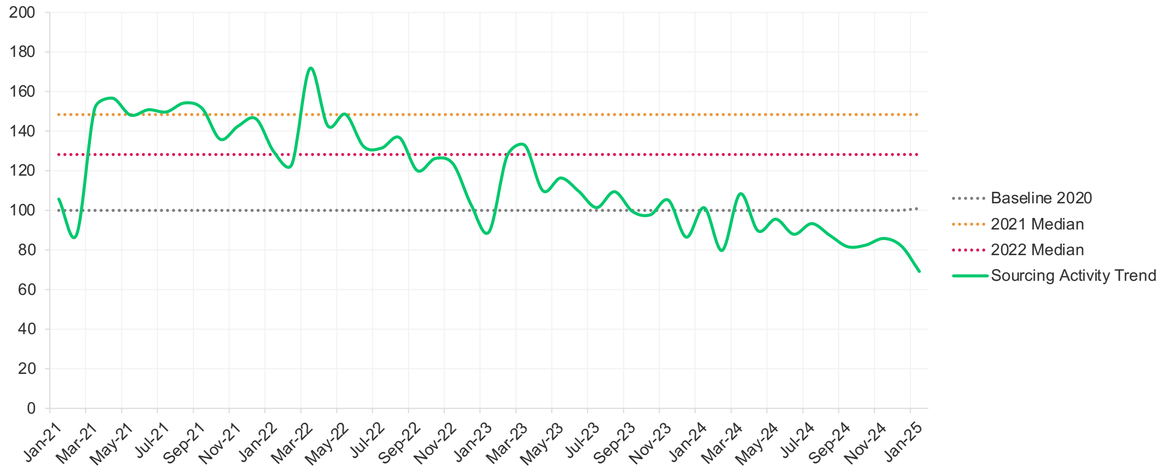

Table 8. Top 15 Product Categories in APAC

Product Class	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-16%	-17%	-5%
Capacitors	83.6	-13%	-14%	-3%
Resistors	62.9	-10%	-17%	-4%
Power Circuits	59.3	-16%	-34%	-5%
Diodes	43.7	-13%	-38%	-5%
Transistors	36.7	-16%	-47%	-6%
Microcontrollers and Processors	35.1	-21%	-47%	-7%
Connector Support	31.0	-10%	-13%	-4%
Optoelectronics	21.9	-12%	-28%	-5%
Inductors	20.5	-19%	-54%	-7%
Drivers And Interfaces	20.1	-21%	-39%	-5%
Amplifier Circuits	17.5	-12%	-40%	-5%
Logic	15.9	-17%	-44%	-5%
Memory	14.9	-24%	-51%	-7%
Converters	14.0	-25%	-35%	-6%

Recap

JANUARY 2025

- Global design and sourcing activities trended as expected in January – increases in EMEA and Americas, while decrease in the APAC region due to the Lunar New Year holiday.

- Activities from engineers and buyers in the computer equipment, industrial control and automation, and automotive verticals continued to remain high in January. Interest in power management and power systems applications were also high across all regions.

- Aligned to the above applications and verticals, the following product categories observed the largest increases in both design and sourcing activities: power circuits, transistors, and diodes.

- For calendar Q1 2025, we anticipate both global design and sourcing activities to increase quarter-over-quarter. Global design activities are expected to increase +6% quarter-over-quarter, while global sourcing activities are expected to increase a more modest +4% to +5%