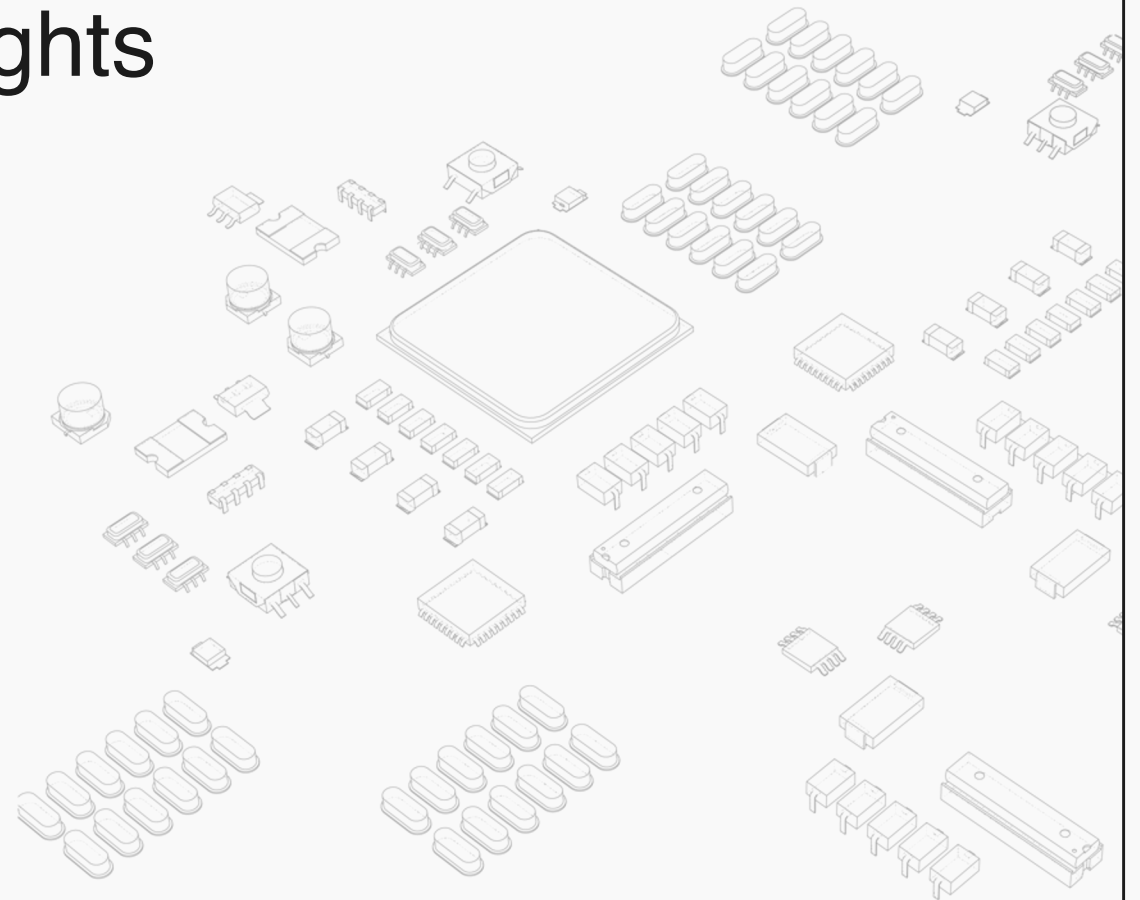




# Design-to-Source Monthly Insights

February 2025



# Report 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 strategies, 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. Index is scored on a scale of 0 – 100.

Index scores are relative to the dimensions of data being included in the analyses (e.g., 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.

Index scores are relative to the dimensions of data being included in the analyses (e.g., 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.

# What We Saw Across The Network

February 2025

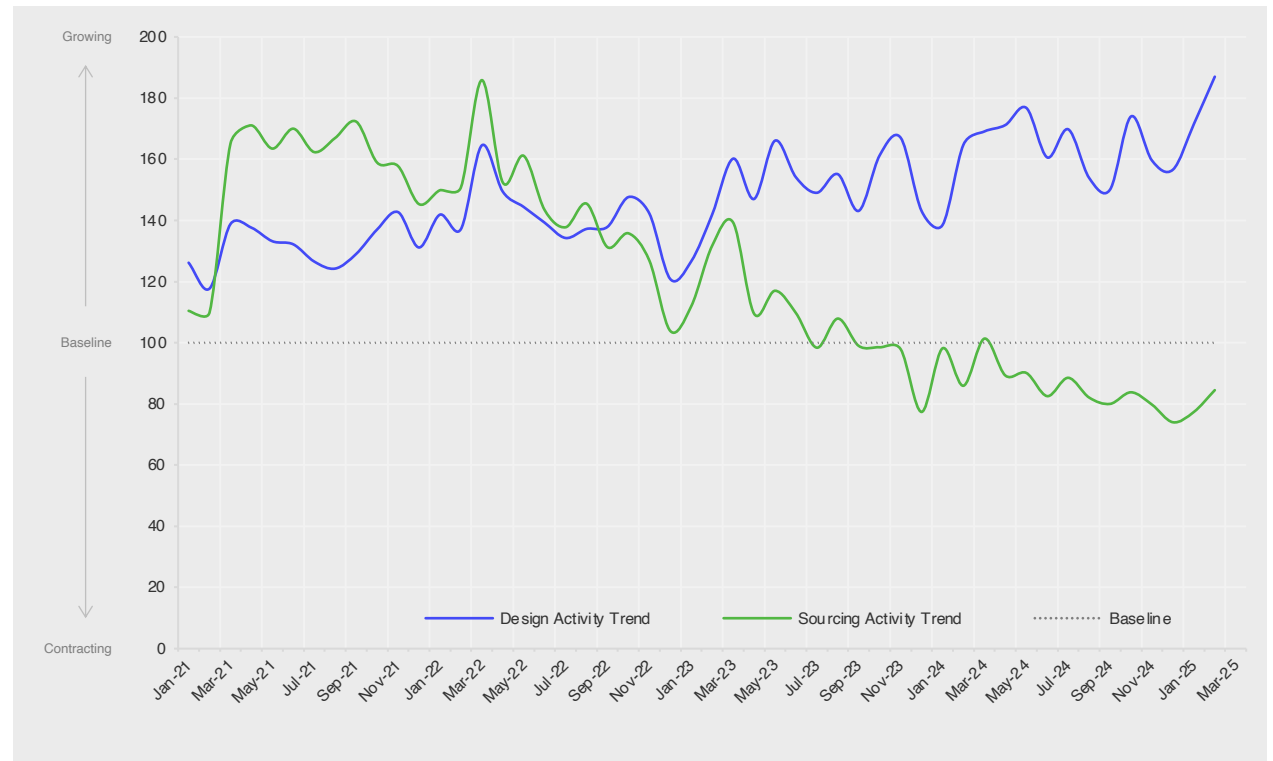
## Key Highlights

- Global design and sourcing activities both increased month-over-month in February following seasonal trends.
- Global design activities increased +9% month-over-month and +14% year-over-year. All regions observed increases in design activities.
- Global sourcing activities increased +9% month-over-month but were still below prior year's activity levels (-2% year-over-year). Increase in global sourcing activities were driven by increases in activities from the APAC region. Sourcing activities increased +25% month-over-month in the region.
- Design and sourcing activities were concentrated in the following verticals: computer equipment / data centers, industrial automation, and aerospace. Automotive continued to be among the top verticals, however compared to prior months, observed lower activity levels.
- Based on February performance, calendar Q1 projections have been adjusted up slightly. Global design and sourcing activities are now expected to increase between +6% to +10% quarter-over-quarter.

## Global Performance

<b>DESIGN ACTIVITES</b>	<b>+9.0% M/M</b>	<b>SOURCING ACTIVITES</b>	<b>+9.2% M/M</b>
	<b>+13.5% Y/Y</b>		<b>-1.7% Y/Y</b>

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 Summary

February 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 (e.g. 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 +9% month-over-month and +14% vs. prior year.

- Design activity trends continued to remain strong across all regions.
- In the EMEA region, design activities increased +12% month-over-month. Notable increases were observed in the United Kingdom (+18%); Spain (+28%); Switzerland (+33%); and the Netherlands (+15%). In these countries, the following product categories observed the largest increases in activities compared to prior month: MCUs and MPUs (+37%); amplifier circuits (+53%); drivers and interfaces (+48%); and connectors (+29%). Top countries in the region that have seen sustained growth over the last 6 months included: Germany, France, Italy, Spain, and Poland.
- In the Americas, the United States observed a +6% month-over-month increase, while Canada observed a -10% month-over-month decrease in design activities. Both countries grew year-over-year in design activities. In these two countries, the following product categories observed the largest increase in activities: MCUs and MPUs (+12%); drivers and interfaces (+11%); logic (+14%); and amplifier circuits (+22%). Brazil and Mexico also observed month-over-month increases in design activities.
- In the APAC region, China, South Korea, Taiwan, Vietnam, Singapore, and Malaysia observed the largest increases in month-over-month design activities. In these countries, the following product categories observed the largest growth: power circuits (+23%); MCUs and MPUs (+45%); drivers and interfaces (+26%); signal circuits (+36%); and connectors (+18%).

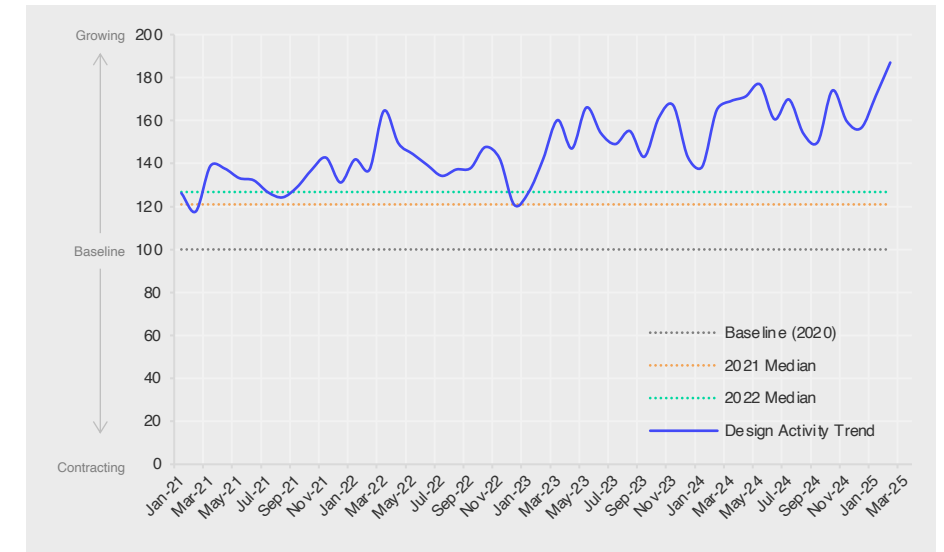
Table 1. Design Activity Summary

		vs. Prior Month	vs. Prior Year	6mo. CMGR
<b>Global</b>		9.0%	13.5%	3.3%
Region	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
EMEA	100.0	12.1%	12.7%	5.5%
APAC	59.4	6.4%	19.5%	0.0%
AMER	44.5	6.2%	7.8%	3.7%

## Top 10 Countries / Territories

Country / Territory	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	6.0%	6.5%	4.1%
India	51.0	-3.5%	11.8%	1.7%
Germany	49.8	4.7%	18.9%	5.6%
China (incl. Hong Kong)	44.8	15.7%	36.8%	-2.5%
United Kingdom	31.1	17.7%	4.8%	5.8%
France	26.4	-0.1%	18.7%	8.3%
Italy	24.5	4.0%	17.4%	8.8%
Republic of Korea	21.0	7.3%	43.7%	2.4%
Turkey	18.8	-0.5%	23.1%	2.4%
Spain	18.4	27.6%	20.2%	2.1%

Chart 2. Global Design Activity Trend



# Design Activity Trend: Americas

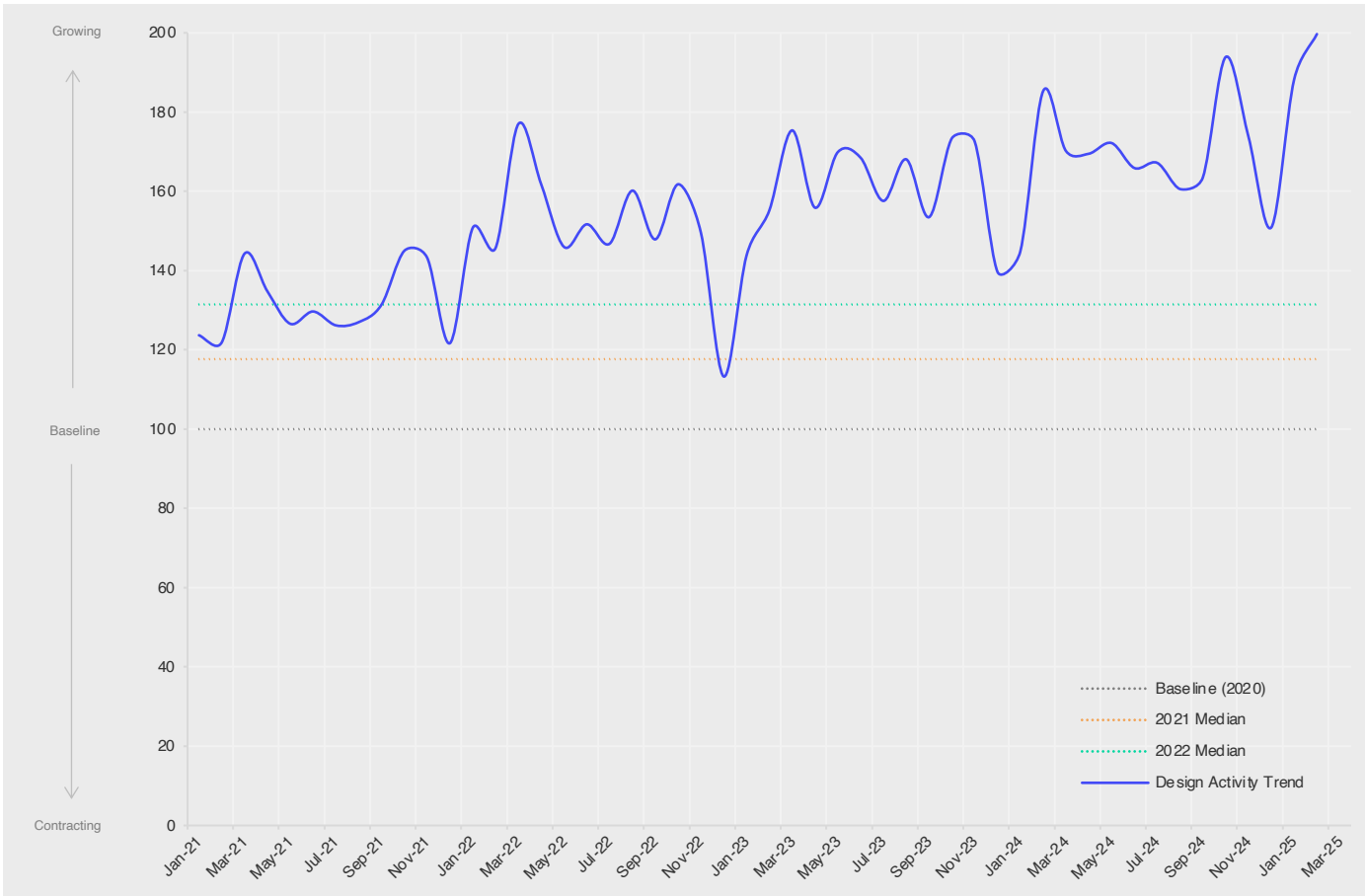
February 2025

## 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.

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Chart 3. Americas Design Activity Trend



Product Group   AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-1%	-2%	3%
Interconnects	80.8	2%	3%	3%
Integrated Circuits	50.2	16%	7%	4%
Discrete Semiconductors	47.0	8%	11%	4%
Power	46.0	8%	2%	4%
Electromechanicals	18.4	13%	5%	3%
Optoelectronics	16.1	7%	1%	3%
Embedded Processors and Controllers	15.8	19%	17%	5%
Sensors	7.3	7%	10%	5%
Memory	5.2	7%	19%	0%
RF and Wireless	3.4	24%	30%	2%
Circuit Protection	2.0	14%	7%	9%

Product Class (Top 15)   AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	0%	5%	2%
Capacitors	63.9	5%	-2%	4%
Power Circuits	63.0	8%	3%	4%
Resistors	57.4	-10%	-8%	3%
Diodes	43.9	13%	14%	5%
Transistors	29.0	1%	8%	4%
Microcontrollers and Processors	24.9	19%	17%	5%
Optoelectronics	24.4	6%	0%	3%
Terminal Blocks	21.8	13%	-7%	4%
Inductors	20.6	2%	12%	3%
Drivers And Interfaces	19.4	16%	15%	4%
Amplifier Circuits	17.0	32%	-1%	5%
Logic	16.4	9%	10%	5%
Switches	15.8	15%	10%	2%
Signal Circuits	15.5	13%	6%	3%



# Design Activity Trend: EMEA

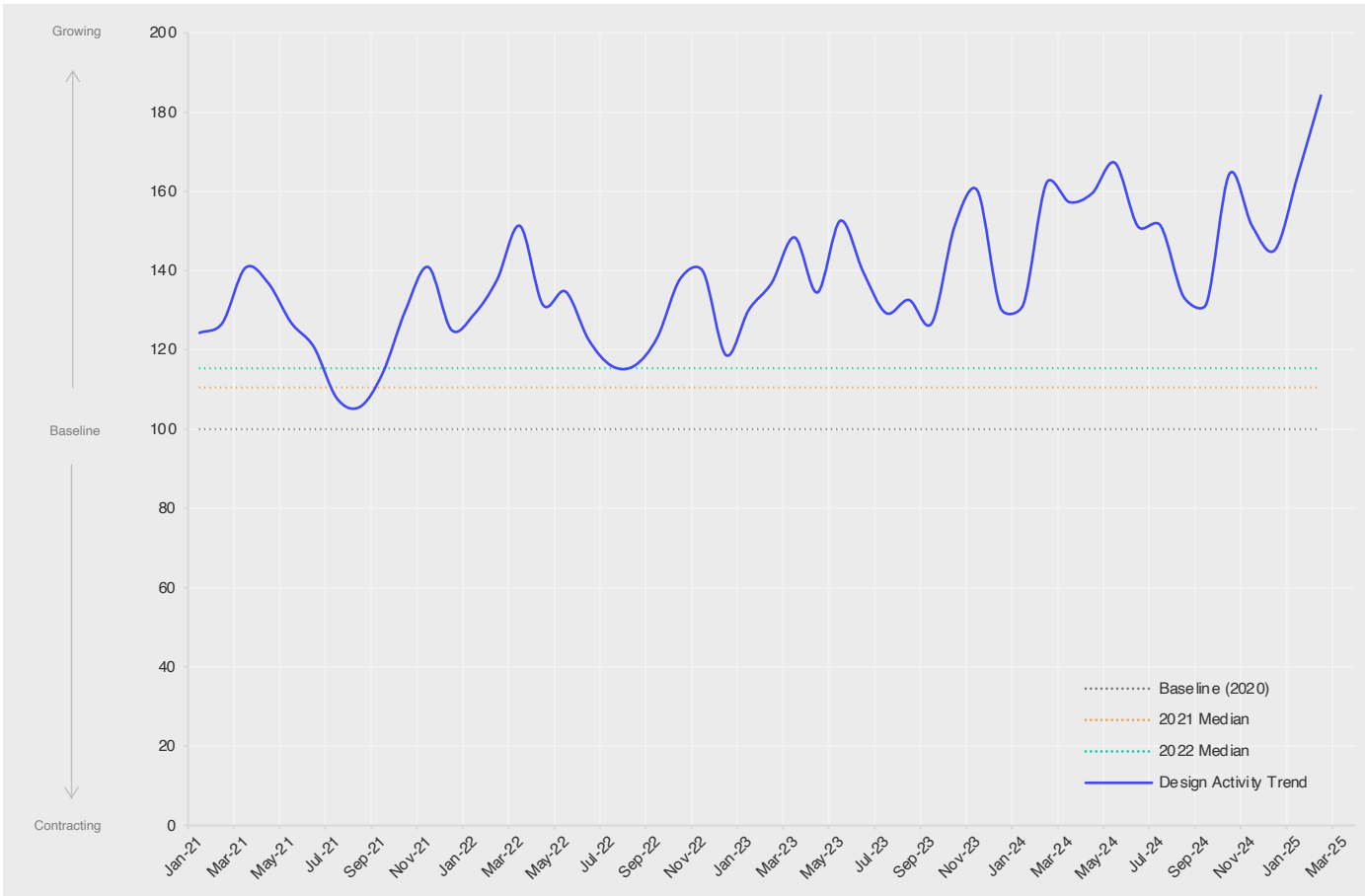
February 2025

## Design Activity Index

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Chart 4. EMEA Design Activity Trend



Product Group   EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	14%	13%	5%
Interconnects	84.3	11%	12%	6%
Integrated Circuits	49.3	13%	5%	6%
Discrete Semiconductors	47.8	13%	8%	6%
Power	44.1	13%	8%	5%
Electromechanicals	17.7	12%	11%	4%
Embedded Processors and Controllers	16.7	8%	5%	4%
Optoelectronics	15.8	14%	9%	5%
Sensors	5.1	2%	8%	6%
Memory	4.1	6%	8%	6%
RF and Wireless	3.4	25%	26%	5%
Circuit Protection	1.9	24%	20%	9%

Product Class (Top 15)   EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	12%	13%	6%
Power Circuits	61.8	12%	7%	6%
Capacitors	58.4	13%	13%	5%
Resistors	53.2	12%	13%	4%
Diodes	43.2	16%	9%	5%
Transistors	30.2	10%	9%	7%
Terminal Blocks	26.9	8%	5%	7%
Inductors	26.4	24%	20%	6%
Microcontrollers and Processors	26.0	8%	5%	4%
Optoelectronics	24.0	13%	9%	5%
Drivers And Interfaces	19.2	13%	8%	6%
Amplifier Circuits	17.1	27%	8%	7%
Logic	14.7	12%	9%	5%
Signal Circuits	14.2	7%	-2%	6%
Switches	13.2	5%	14%	3%

# Design Activity Trend: APAC

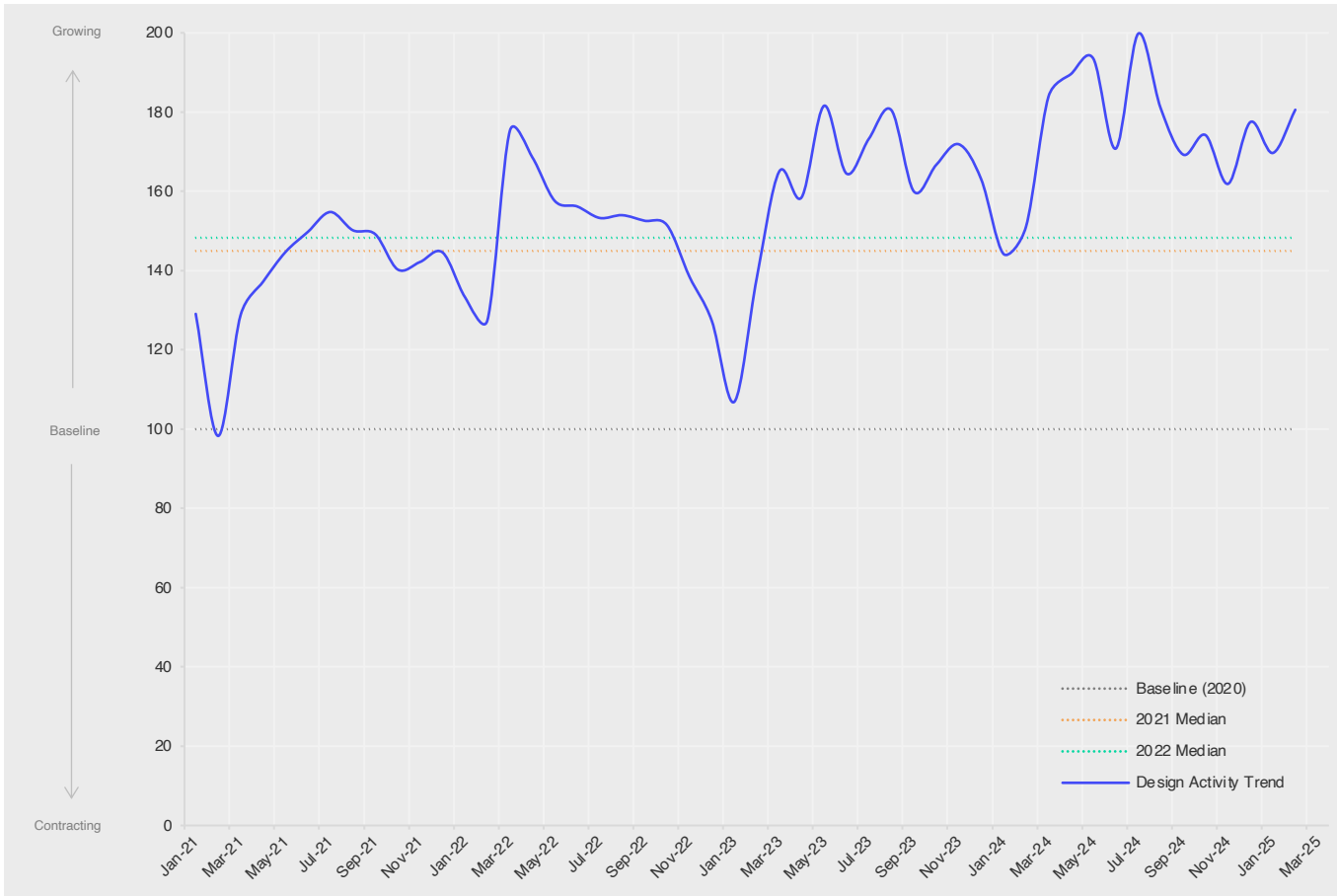
February 2025

## Design Activity Index

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Chart 5. APAC Design Activity Trend



Product Group   APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-4%	17%	0%
Interconnects	71.6	9%	12%	0%
Integrated Circuits	60.2	12%	18%	0%
Discrete Semiconductors	57.1	8%	13%	-1%
Power	49.6	15%	27%	0%
Embedded Processors and Controllers	20.2	22%	20%	0%
Electromechanicals	15.4	2%	14%	-1%
Optoelectronics	15.0	0%	9%	0%
Memory	5.4	23%	10%	1%
Sensors	4.8	13%	28%	0%
RF and Wireless	3.7	-4%	1%	-4%
Circuit Protection	1.8	23%	37%	-2%

Product Class (Top 15)   APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	9%	15%	0%
Power Circuits	74.4	14%	28%	0%
Capacitors	65.1	-3%	18%	0%
Diodes	56.7	8%	19%	0%
Resistors	53.7	-9%	14%	0%
Transistors	36.8	8%	5%	-1%
Microcontrollers and Processors	33.5	22%	20%	0%
Optoelectronics	24.1	0%	9%	-1%
Drivers And Interfaces	23.5	15%	6%	-1%
Inductors	23.2	3%	19%	-1%
Amplifier Circuits	22.3	2%	19%	-2%
Signal Circuits	21.0	32%	34%	5%
Logic	17.2	1%	12%	-2%
Filters	15.6	3%	24%	-1%
Terminal Blocks	15.4	3%	-3%	-3%

# Sourcing Activity Summary

February 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 (e.g., 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 +9% month-over-month but remained below prior year.

- Increase in global sourcing activities were predominantly driven by increase in activities from the APAC region. Sourcing activities increased +25% month-over-month in the region.
- Compared to prior year, sourcing activities decreased both in the Americas and EMEA region, while the APAC region observed an +8% increase. Improved demand in China, South Korea, Taiwan, Malaysia, and Singapore were the primary drivers for growth in sourcing activities in APAC.
- In the APAC region, the product categories that recorded the largest increases in activities included: MCUs and MPUs (+42%); inductors (+41%); memory (+41%); drivers and interfaces (+39%); and drivers and interfaces (+39%).
- In the EMEA region, Germany, Italy, France, and Poland recorded increases in sourcing activities. Inversely, Israel, the United Kingdom, Spain, and Sweden observed decreases in activities. Product categories that observed the largest increases in demand in the region included: MCUs and MPUs (+11%); memory (+14%); and connectors (+7%).
- In the Americas, sourcing activities increased for MCUs and MPUs (+4%); transistors (+3%); and memory (+3%). Drivers and interfaces as well as logics also observed small increase (+1%) increases in sourcing activities in the region for February.
- Global sourcing activities have continued to remain stable. The six months compounded monthly growth rate (CMGR) was +0.5%.

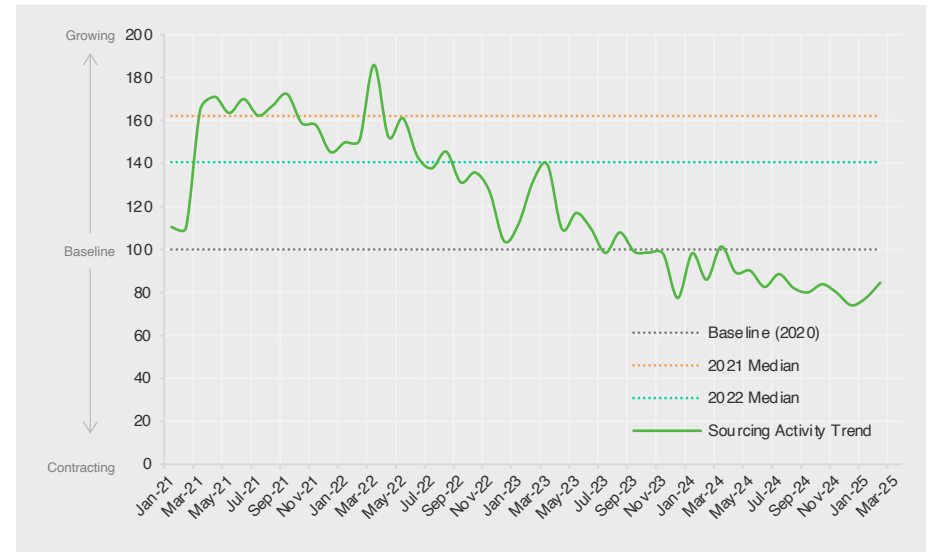
Table 2. Sourcing Activity Summary

		vs. Prior Month	vs. Prior Year	6mo. CMGR
Global	92.2	+9.2%	-1.7%	+0.5%
Region	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
APAC	100.0	+24.6%	+8.0%	-0.2%
AMER	59.4	-5.6%	-7.5%	-0.2%
EMEA	34.7	+0.4%	-14.6%	+4.2%

## Top 10 Countries / Territories

Country / Territory	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	-5.1%	-8.4%	-0.4%
China (incl. Hong Kong)	99.6	+4.4%	+12.7%	-1.3%
India	35.6	-3.9%	-5.6%	+0.4%
Republic of Korea	29.1	+28.9%	+3.7%	+4.0%
Germany	17.6	+4.5%	-10.3%	+4.1%
Taiwan	15.1	+27.6%	+22.3%	-0.6%
Malaysia	11.8	+25.1%	+9.3%	-0.6%
Canada	11.1	-10.3%	-12.6%	+0.2%
Singapore	8.7	+18.6%	+1.6%	-0.2%
Mexico	7.3	-9.5%	+4.3%	+2.5%

Chart 6. Global Sourcing Activity Trend





# Sourcing Activity Trend: Americas

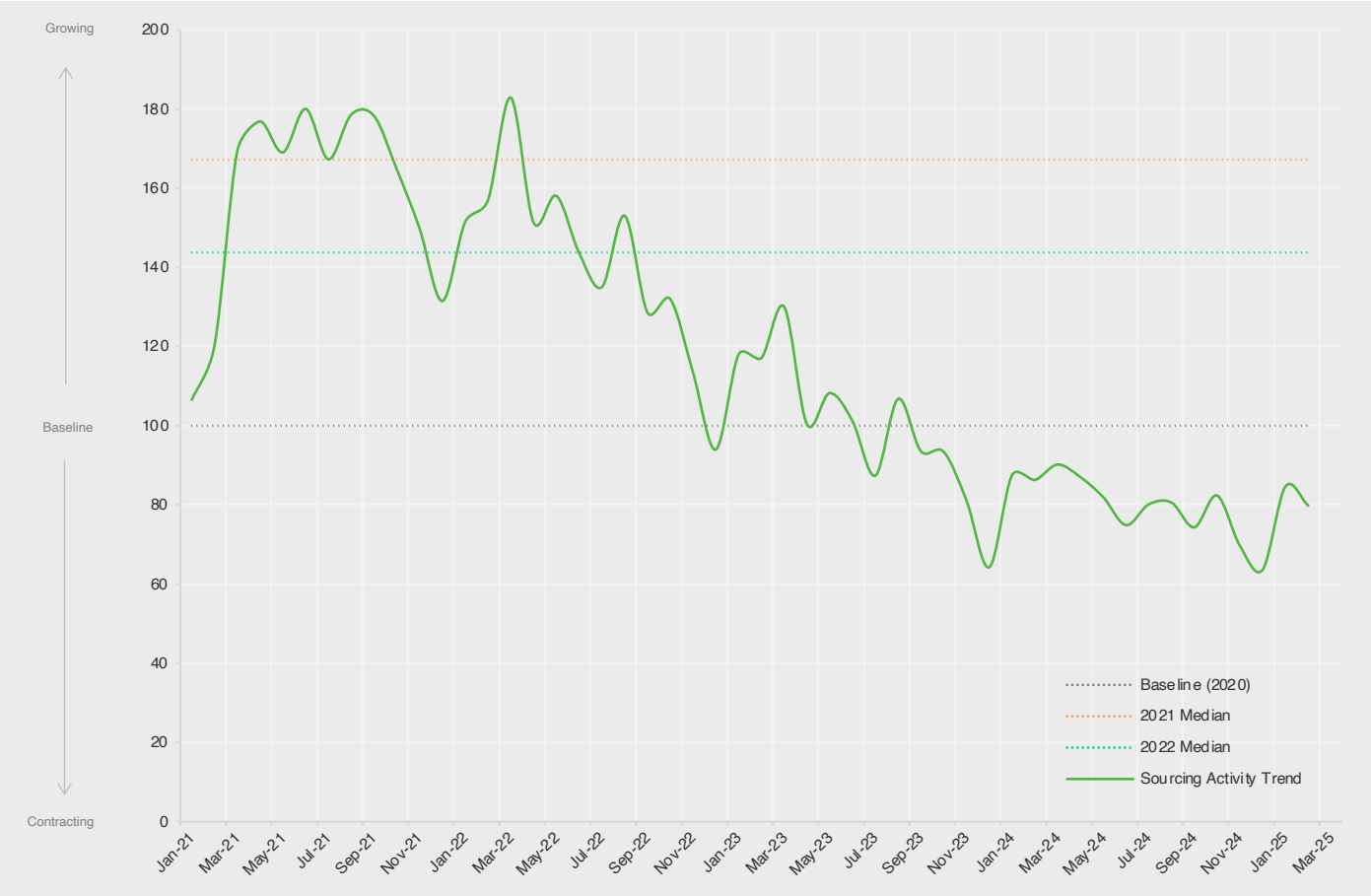
February 2025

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Chart 7. Americas Sourcing Activity Trend



Product Group   AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-8%	-7%	-1%
Interconnects	91.9	-5%	-3%	0%
Discrete Semiconductors	36.8	1%	-11%	1%
Integrated Circuits	32.5	-1%	-18%	-1%
Power	27.7	-10%	-5%	1%
Electromechanicals	12.8	-10%	-2%	1%
Embedded Processors and Controllers	11.3	4%	-19%	0%
Optoelectronics	10.7	-10%	-9%	1%
Memory	5.8	3%	-5%	0%
Sensors	3.4	-11%	-3%	1%
Circuit Protection	3.1	-7%	-3%	0%
RF and Wireless	3.0	-10%	6%	2%

Product Class (Top 15)   AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-3%	-4%	0%
Capacitors	75.6	-8%	-4%	-1%
Resistors	64.7	-9%	-8%	-1%
Power Circuits	40.4	-9%	-4%	1%
Connector Support	35.9	-8%	3%	-1%
Diodes	34.2	-1%	-13%	1%
Transistors	27.2	3%	-10%	1%
Terminal Blocks	20.6	-10%	-2%	-1%
Microcontrollers and Processors	19.5	4%	-19%	0%
Optoelectronics	17.9	-11%	-8%	1%
Inductors	16.4	-6%	-17%	-1%
Amplifier Circuits	14.0	0%	-7%	0%
Drivers And Interfaces	11.9	1%	-17%	-2%
Logic	11.5	1%	-23%	-1%
Memory	10.0	3%	-5%	0%

# Sourcing Activity Trend: EMEA

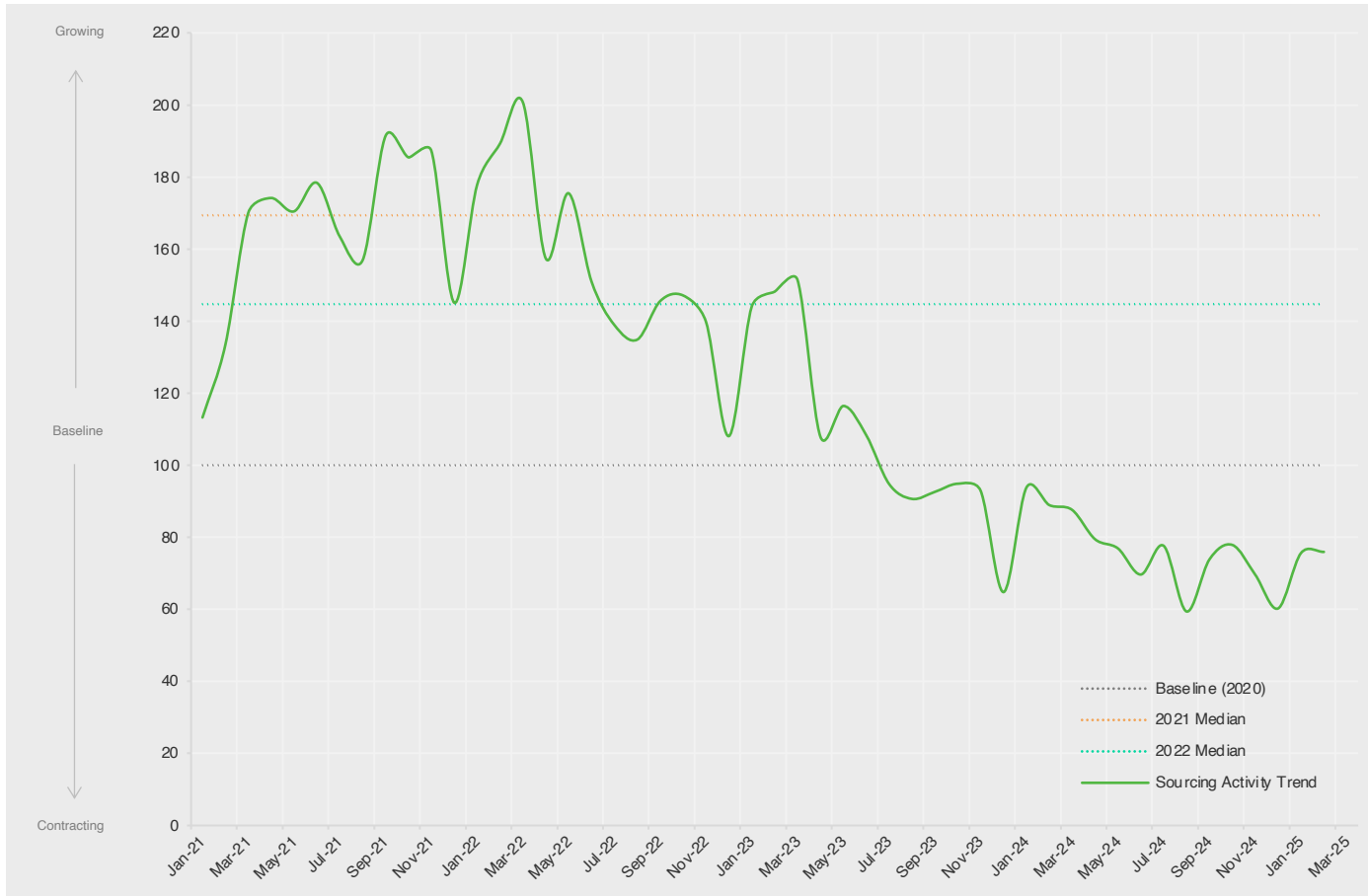
February 2025

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Chart 8. EMEA Sourcing Activity Trend



Product Group   EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-2%	-16%	3%
Interconnects	71.2	7%	-2%	5%
Integrated Circuits	46.1	-8%	-25%	2%
Discrete Semiconductors	46.0	-2%	-19%	5%
Power	36.4	-1%	-16%	5%
Embedded Processors and Controllers	19.4	11%	-16%	6%
Optoelectronics	14.3	2%	-12%	7%
Electromechanicals	13.5	1%	-11%	5%
Memory	8.2	14%	-9%	5%
Sensors	5.1	-4%	-16%	6%
RF and Wireless	3.4	14%	9%	8%
Circuit Protection	3.2	-2%	-16%	4%

Product Class (Top 15)   EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	7%	-3%	5%
Capacitors	88.8	0%	-10%	3%
Resistors	69.0	-6%	-16%	2%
Power Circuits	63.3	-1%	-15%	5%
Diodes	48.9	-1%	-18%	6%
Transistors	43.2	-3%	-18%	5%
Microcontrollers and Processors	40.0	11%	-16%	6%
Connector Support	29.6	9%	0%	6%
Optoelectronics	28.3	0%	-12%	7%
Inductors	25.0	3%	-29%	3%
Amplifier Circuits	24.9	-28%	-22%	-3%
Drivers And Interfaces	22.2	-1%	-28%	5%
Memory	17.0	14%	-9%	5%
Terminal Blocks	16.0	2%	2%	5%
Filters	15.3	-3%	-24%	5%

# Sourcing Activity Trend: APAC

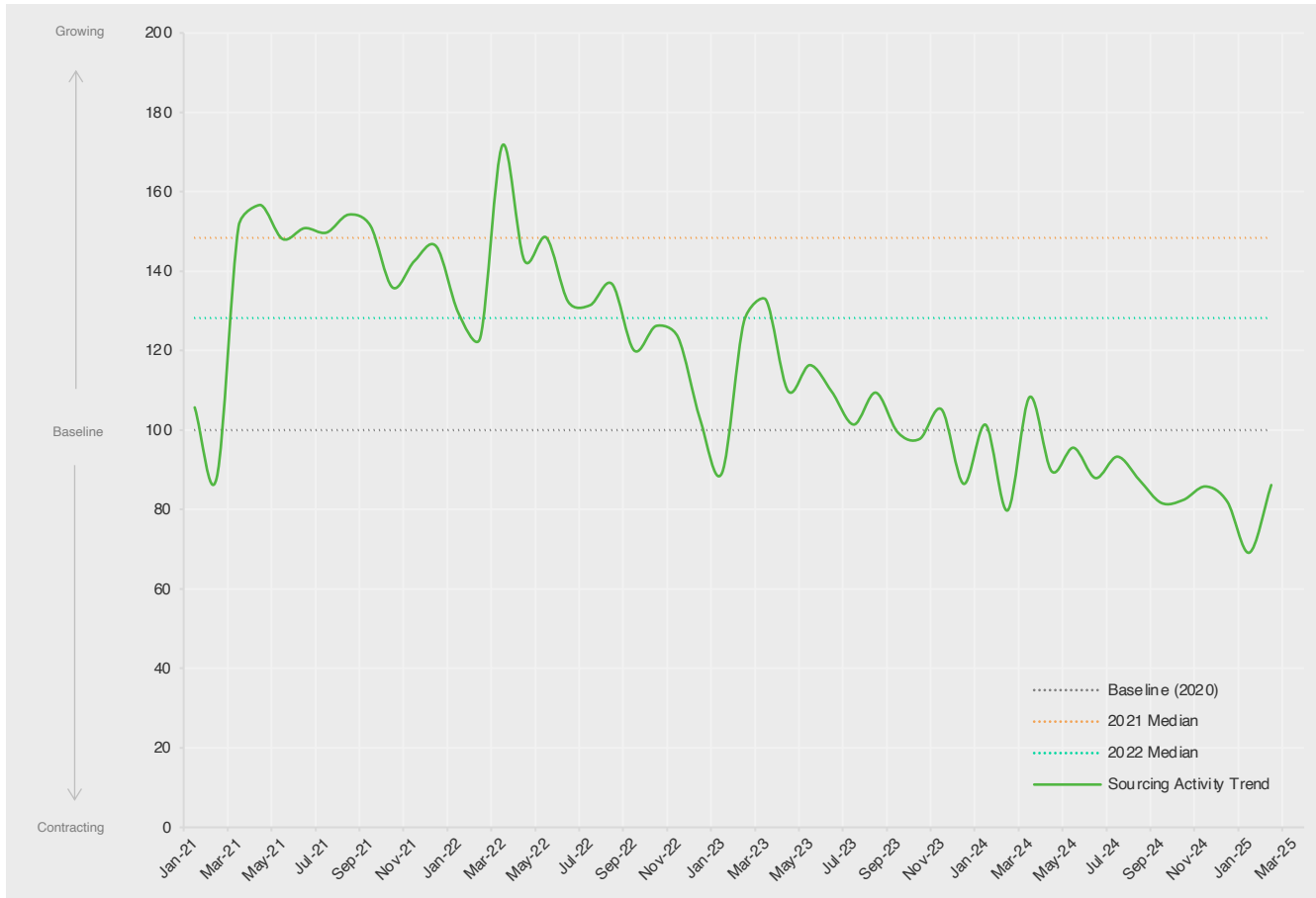
February 2025

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Chart 9. APAC Sourcing Activity Trend



Product Group   APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	19%	11%	0%
Interconnects	80.7	25%	24%	0%
Integrated Circuits	49.5	27%	-5%	-1%
Discrete Semiconductors	45.4	23%	-6%	-1%
Power	42.1	27%	11%	1%
Embedded Processors and Controllers	20.8	33%	-8%	-2%
Electromechanicals	13.2	26%	19%	1%
Optoelectronics	12.3	22%	12%	-1%
Memory	8.7	31%	-1%	-2%
RF and Wireless	6.5	47%	53%	2%
Sensors	5.4	29%	6%	0%
Circuit Protection	4.0	34%	23%	1%

Product Class (Top 15)   APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	26%	23%	0%
Capacitors	79.2	20%	19%	0%
Power Circuits	59.5	27%	11%	1%
Resistors	56.9	14%	14%	0%
Diodes	42.5	23%	-3%	-1%
Microcontrollers and Processors	37.1	33%	-8%	-2%
Transistors	36.3	25%	-11%	-1%
Connector Support	29.2	19%	23%	0%
Inductors	21.3	31%	-8%	-2%
Optoelectronics	21.1	21%	13%	0%
Drivers And Interfaces	20.4	28%	1%	0%
Amplifier Circuits	16.6	20%	-17%	0%
Memory	15.5	31%	-1%	-2%
Logic	15.3	22%	-11%	0%
Converters	14.4	29%	10%	1%

# Recap

February 2025

- Global design and sourcing activities trended as expected in February. Both design and sourcing activities increased month-over-month.
- Global sourcing activities continued to show signs of stability – recording a +0.5% average growth over the last 6 months. Both APAC and the Americas remained flat during this period, while EMEA grew and average of +4% over the same 6 months.
- Globally, we observed activities surrounding embedded processors and controllers record healthy increases in February. With engineers, design activities increased +15% month-over-month and +12% year-over-year. With buyers, sourcing activities increased +21% month-over-month, but demand continued to be lower than what we observed last year.
- Other product groups that observed healthy growth with engineers and buyers alike included: power products, ICs, discrete semiconductors, memory, and RF and wireless.
- For calendar Q1 2025, we anticipate both global design and sourcing activities to increase between +6% to +10% quarter-over-quarter.

