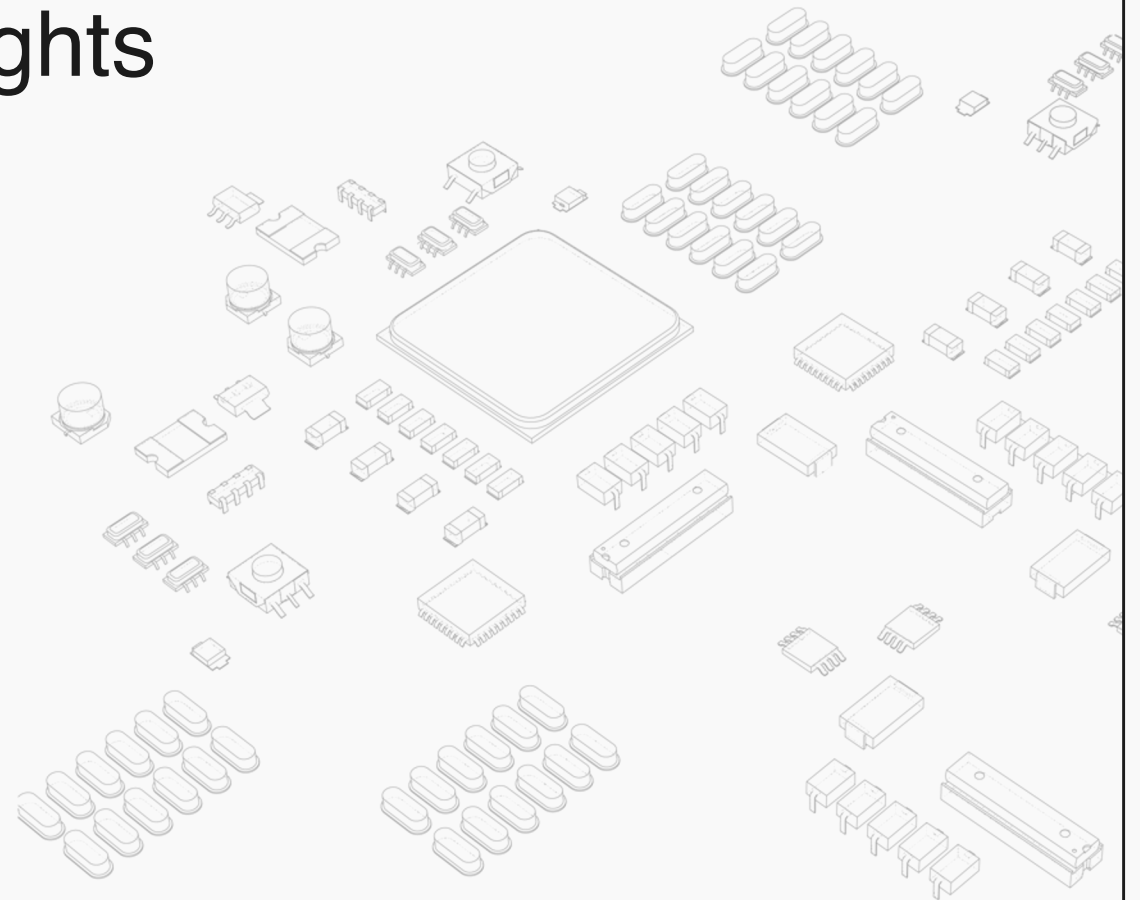




Design-to-Source Monthly Insights

March 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

March 2025

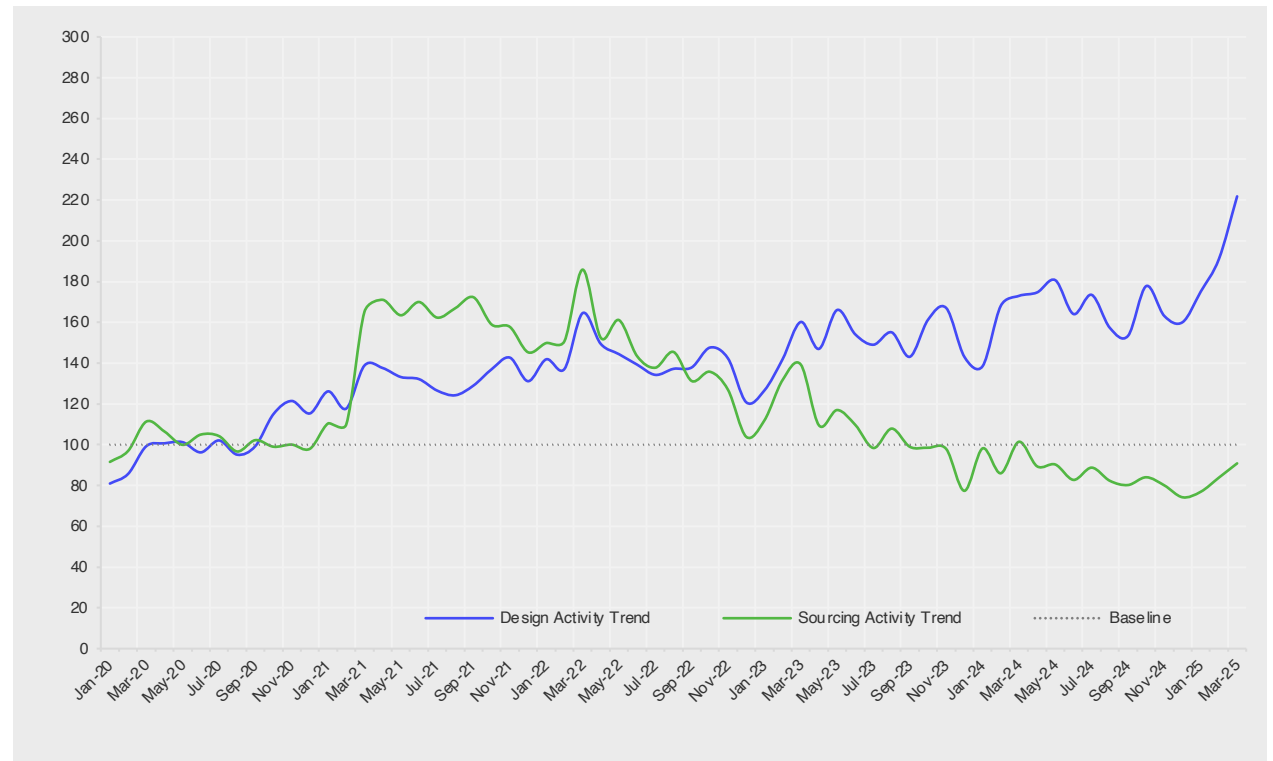
Key Highlights

- Following seasonal trends, global design and sourcing activities both increased month-over-month. Historically, March has represented the peak of activities each year across Supplyframe's design-to-source network
- Global design activities increased +16% month-over-month, performing better than expected. Increase in activities were observed across all regions and product categories. Compared to prior year, global design activities increased +28% in March
- Global sourcing activities also increased +8% month-over-month. Growth was seen across APAC and the Americas regions, while activities in EMEA remained flat vs. the prior month. Compared to prior year, global sourcing activities were down -11% in March
- For the quarter (Q1), global design activities increased +17%, while global sourcing activities increased +6% vs. Q4 2024. Increase in activities were observed across all regions
- Q2 2025 projections: global design activities are expected to remain flat quarter-over-quarter, while global sourcing activities are expected to decrease between -7% to -9% quarter-over-quarter

Global Performance

DESIGN ACTIVITES	+16.1% M/M	SOURCING ACTIVITES	+8.3% M/M
	+28.2% Y/Y		-10.5% 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 Summary

March 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 +16% month-over-month and +28% vs. prior year.

- Global design activities increased more than expected in March. Historically, global design activities have increased on average +14% from February to March
- Growth was observed across all regions, but the APAC region observed the largest increase in design activities (+26% month-over-month). Within the region, the following countries contributed the most to the region's trend: China (+47%), Australia (+66%), Vietnam (+43%), Taiwan (+25%), and South Korea (+19%). The top product groups in these countries included passives, ICs, interconnects, power, and discrete semiconductors
- In the EMEA region, design activities increased +2% month-over-month. Notable increases were observed in Poland (+30%), Switzerland (+22%), the Netherlands (+27%), Italy (+16%), the United Kingdom (+10%), and Spain (+10%). In these countries, the following product groups observed the largest increases in design activities: passives (+23%), integrated circuits (+18%), discrete semiconductors (+20%), embedded processors and controllers (+25%), sensors (+46%), and memory (+25%)
- In the Americas, the United States (+11%), Brazil (+21%), and Mexico (+16%) all observed strong growth in design activities. In Canada, design activities increased a more modest +2% month-over-month. In these countries, the following product groups observed the largest increases in design activities: passives (+20%), RF and Wireless (+29%), embedded processors and controllers (+12%), optoelectronics (+10%), and power products (+10%)

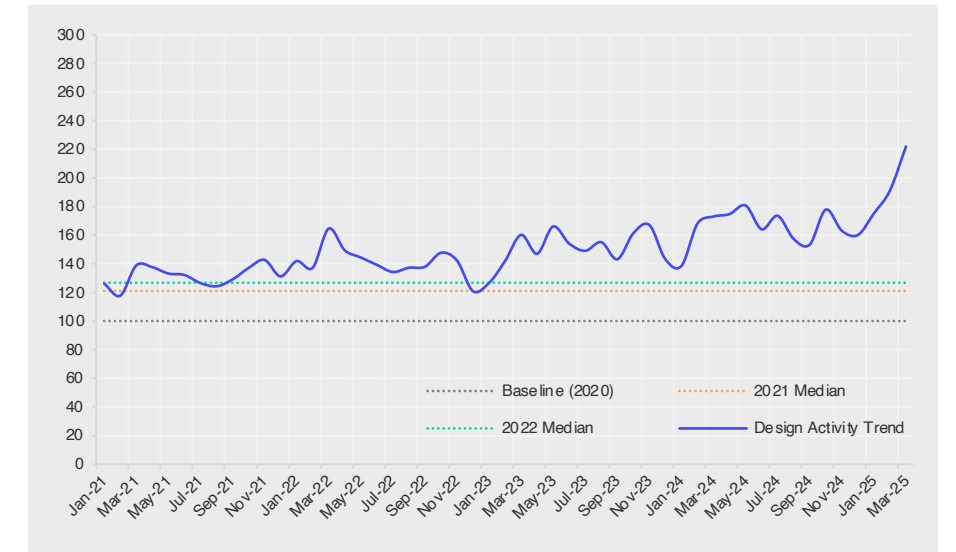
Table 1. Design Activity Summary

		vs. Prior Month	vs. Prior Year	6mo. CMGR
Global		16.1%	28.2%	6.3%
Region	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
EMEA	100.0	12.3%	30.4%	7.8%
APAC	66.4	25.6%	23.3%	5.0%
AMER	44.3	11.8%	30.9%	5.3%

Top 10 Countries / Territories

Country / Territory	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	10.7%	29.3%	6.2%
China (incl. Hong Kong)	59.4	47.0%	11.8%	6.8%
India	54.3	17.9%	28.1%	3.9%
Germany	47.5	5.7%	37.1%	6.6%
United Kingdom	30.8	9.6%	28.1%	5.9%
Italy	25.6	15.6%	23.4%	9.6%
France	23.9	0.3%	16.5%	5.8%
Republic of Korea	22.6	19.0%	43.2%	7.5%
Spain	18.2	9.8%	35.4%	5.7%
Turkey	16.5	-2.5%	40.9%	3.2%

Chart 2. Global Design Activity Trend



Design Activity Trend: Americas

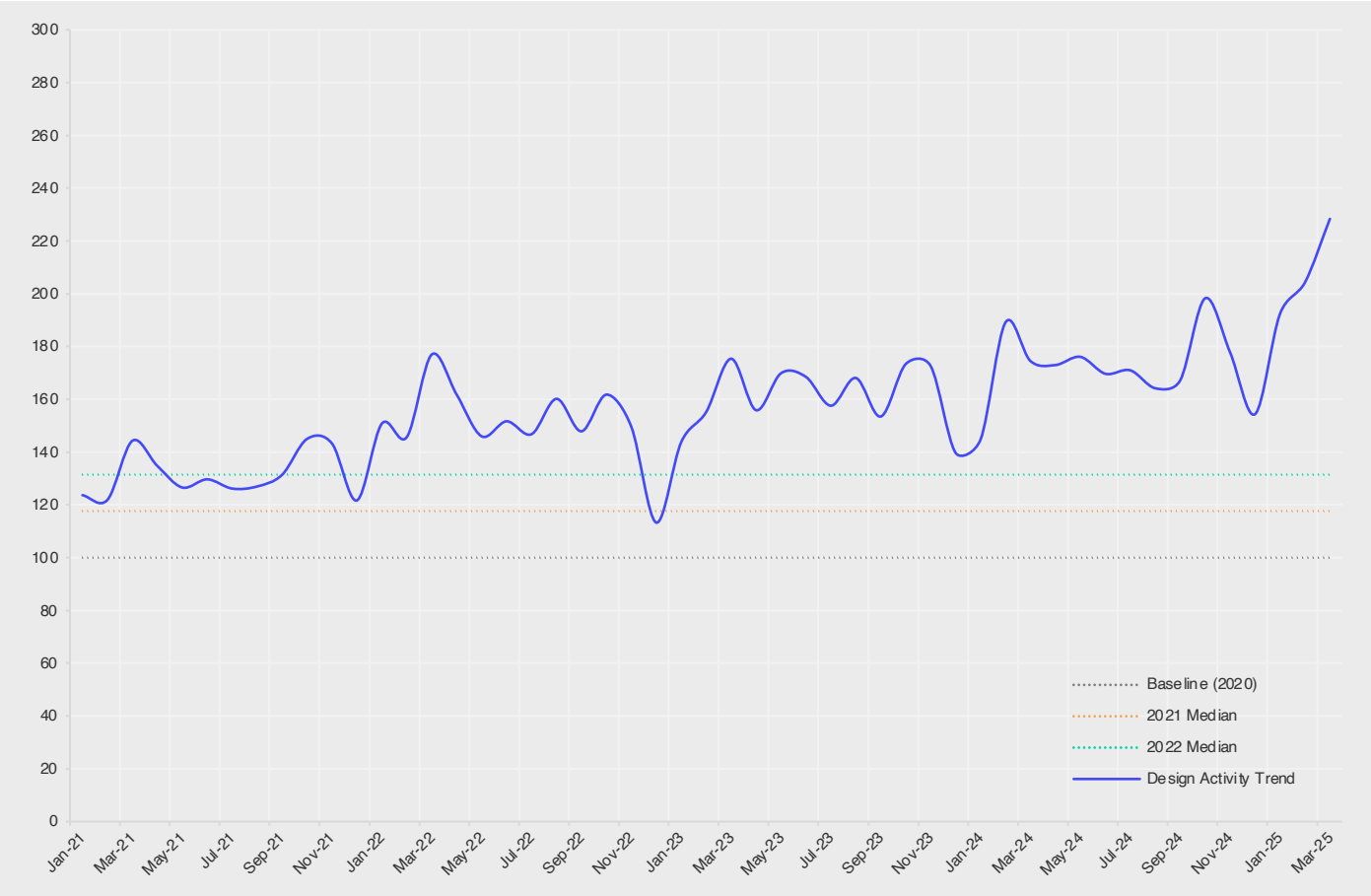
March 2025

Design Activity Index

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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	19%	32%	5%
Interconnects	74.6	10%	17%	5%
Integrated Circuits	45.2	7%	26%	4%
Discrete Semiconductors	42.9	9%	27%	6%
Power	42.3	10%	36%	6%
Electromechanicals	16.0	4%	17%	4%
Embedded Processors and Controllers	16.0	20%	41%	7%
Optoelectronics	15.8	17%	23%	6%
Sensors	6.3	3%	23%	2%
Memory	4.3	-2%	4%	6%
RF and Wireless	3.5	22%	70%	7%
Circuit Protection	1.6	-6%	22%	7%

Product Class (Top 15) AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	10%	18%	5%
Capacitors	68.0	17%	34%	6%
Resistors	63.8	23%	32%	5%
Power Circuits	61.9	9%	33%	6%
Diodes	41.7	5%	29%	6%
Transistors	30.2	15%	28%	6%
Microcontrollers and Processors	27.1	20%	41%	7%
Optoelectronics	25.9	17%	20%	6%
Terminal Blocks	21.9	11%	8%	7%
Inductors	20.8	10%	26%	4%
Drivers And Interfaces	17.3	-3%	17%	3%
Signal Circuits	16.6	17%	43%	5%
Logic	15.2	2%	29%	2%
Amplifier Circuits	15.1	-2%	14%	3%
Switches	14.2	-1%	11%	3%

Design Activity Trend: EMEA

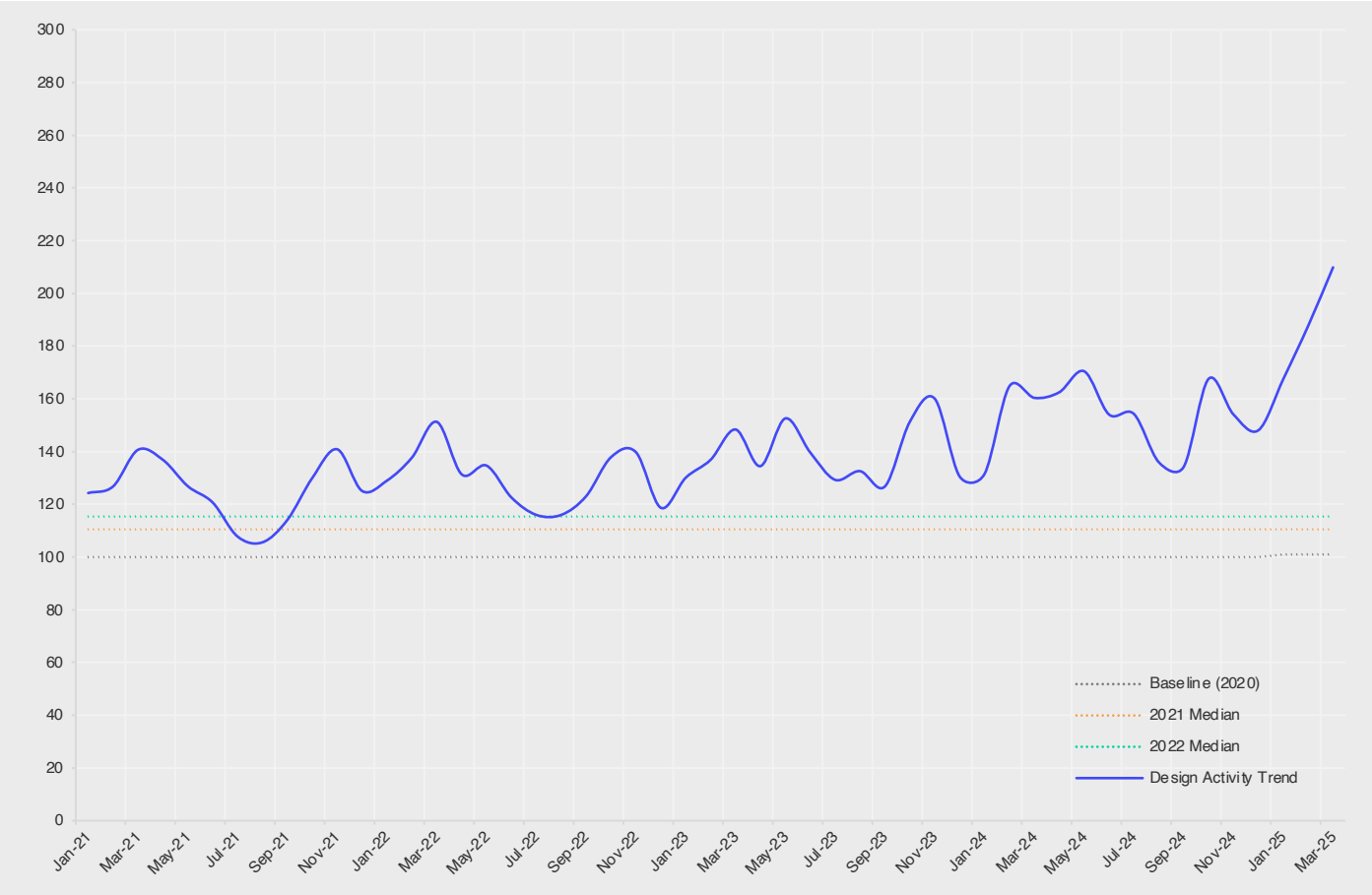
March 2025

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%	33%	8%
Interconnects	78.5	6%	24%	7%
Integrated Circuits	49.8	14%	24%	8%
Discrete Semiconductors	47.0	12%	26%	7%
Power	43.6	13%	27%	8%
Embedded Processors and Controllers	17.3	19%	24%	8%
Electromechanicals	16.8	8%	15%	6%
Optoelectronics	15.9	14%	23%	7%
Sensors	5.8	28%	34%	9%
Memory	3.9	8%	17%	5%
RF and Wireless	3.7	24%	56%	10%
Circuit Protection	1.8	4%	20%	7%

Product Class (Top 15) EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	8%	25%	7%
Power Circuits	64.7	14%	26%	8%
Capacitors	60.5	12%	31%	8%
Resistors	57.0	16%	36%	8%
Diodes	44.0	10%	26%	7%
Transistors	31.8	13%	26%	8%
Microcontrollers and Processors	28.5	19%	24%	8%
Inductors	27.3	11%	35%	9%
Optoelectronics	25.4	14%	22%	7%
Terminal Blocks	25.4	2%	19%	7%
Drivers And Interfaces	19.2	8%	25%	6%
Amplifier Circuits	17.5	10%	26%	8%
Logic	16.6	22%	34%	9%
Signal Circuits	15.0	12%	13%	7%
Switches	14.4	17%	20%	7%

Design Activity Trend: APAC

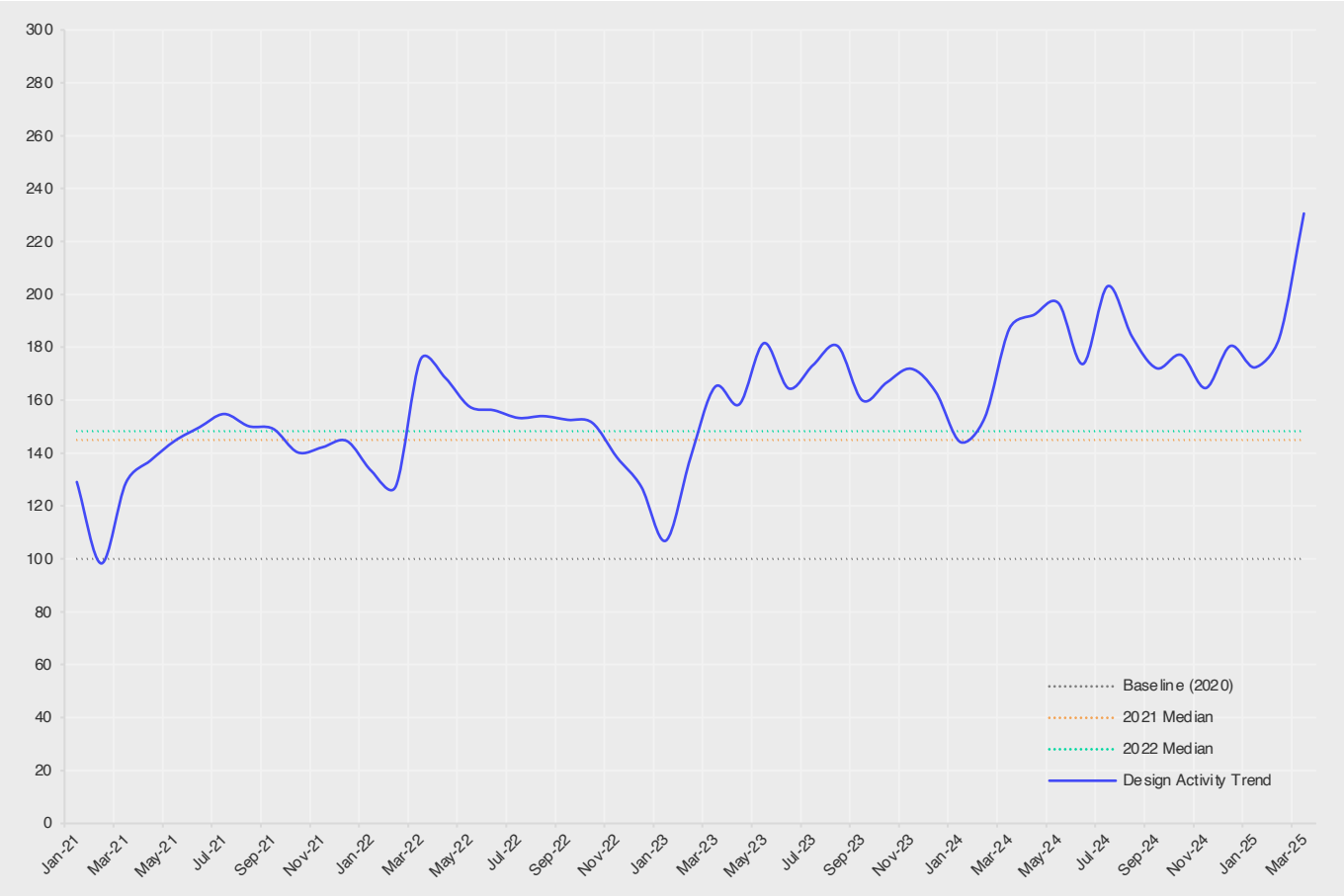
March 2025

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	28%	19%	5%
Interconnects	65.2	17%	15%	3%
Integrated Circuits	60.9	29%	21%	5%
Discrete Semiconductors	53.3	20%	20%	4%
Power	50.0	31%	17%	6%
Embedded Processors and Controllers	20.7	32%	33%	7%
Optoelectronics	15.0	28%	19%	3%
Electromechanicals	14.9	24%	22%	4%
Sensors	5.8	55%	56%	9%
Memory	4.9	18%	18%	4%
RF and Wireless	4.4	55%	42%	7%
Circuit Protection	1.7	25%	55%	4%

Product Class (Top 15) APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	15%	14%	3%
Power Circuits	83.3	30%	18%	6%
Capacitors	74.4	31%	22%	5%
Diodes	59.4	20%	22%	4%
Resistors	57.1	22%	7%	4%
Microcontrollers and Processors	38.5	32%	33%	7%
Transistors	38.4	20%	17%	4%
Drivers And Interfaces	29.0	41%	30%	6%
Inductors	28.6	41%	37%	8%
Optoelectronics	27.1	29%	19%	3%
Amplifier Circuits	25.4	31%	24%	6%
Logic	21.4	42%	4%	6%
Signal Circuits	19.0	2%	21%	3%
Terminal Blocks	17.5	31%	28%	4%
Filters	16.2	20%	25%	5%

Sourcing Activity Summary

March 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 month-over-month but remained below prior year.

- Global sourcing activities increased for the third consecutive month in March. In March, global sourcing activities increased +8% month-over-month. This was below the seasonal average of +15% that we've historically seen from February to March. Global sourcing activities continued to remain below prior years' activity levels
- The APAC region observed the largest month-over-month increase in sourcing activities. Increase in sourcing activities were observed in the following countries: China (+27%), South Korea (+4%), Taiwan (+6%) and Vietnam (+66%). In these countries, the following product groups observed the largest increase in sourcing activities: passives (+32%), power products (+22%), and embedded processors and controllers (+20%)
- The Americas region observed a +5% month-over-month increase in sourcing activities. Increase in activities were driven by the United States (+6%), Canada (+9%), and Mexico (+4%). In Brazil, sourcing activities decreased -14% month-over-month. In the region, the following product groups observed the largest increase in sourcing activities: integrated circuits (+11%), sensors (+12%), passives (+6%), and interconnects (+6%)
- The EMEA region remained flat month-over-month in activity volume. Countries in the region that observed month-over-month increase in sourcing activities included: Israel (+10%), Spain (+7%), Poland (+4%), Italy (+2%), and France (+1%). In these countries, the following product categories observed growth in activities: passives (+14%), discrete semiconductors (+9%), sensors (+11%), rf and wireless (+7%), and power (+3%).

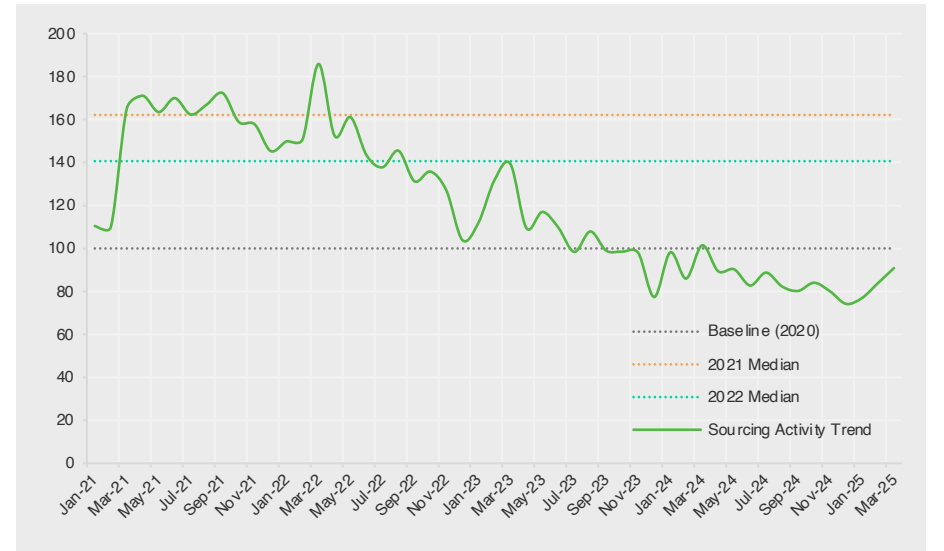
Table 2. Sourcing Activity Summary

		vs. Prior Month	vs. Prior Year	6mo. CMGR
Global		8.3%	-10.5%	2.1%
Region	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
APAC	100.0	13.0%	-10.9%	2.8%
AMER	55.3	5.1%	-7.7%	1.9%
EMEA	30.8	0.3%	-13.8%	0.3%

Top 10 Countries / Territories

Country / Territory	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
China (incl. Hong Kong)	100.0	26.5%	-16.0%	3.3%
United States	84.4	6.1%	-7.6%	1.9%
India	26.5	-6.8%	-7.2%	0.6%
Republic of Korea	24.1	4.3%	3.4%	5.5%
Germany	13.4	-4.3%	-12.3%	1.1%
Taiwan	12.7	6.1%	-12.1%	1.2%
Canada	9.6	8.7%	-10.9%	2.0%
Malaysia	9.1	-2.2%	2.4%	1.9%
Singapore	7.3	5.1%	-13.5%	1.4%
Mexico	6.0	3.6%	3.0%	4.0%

Chart 6. Global Sourcing Activity Trend



Sourcing Activity Trend: Americas

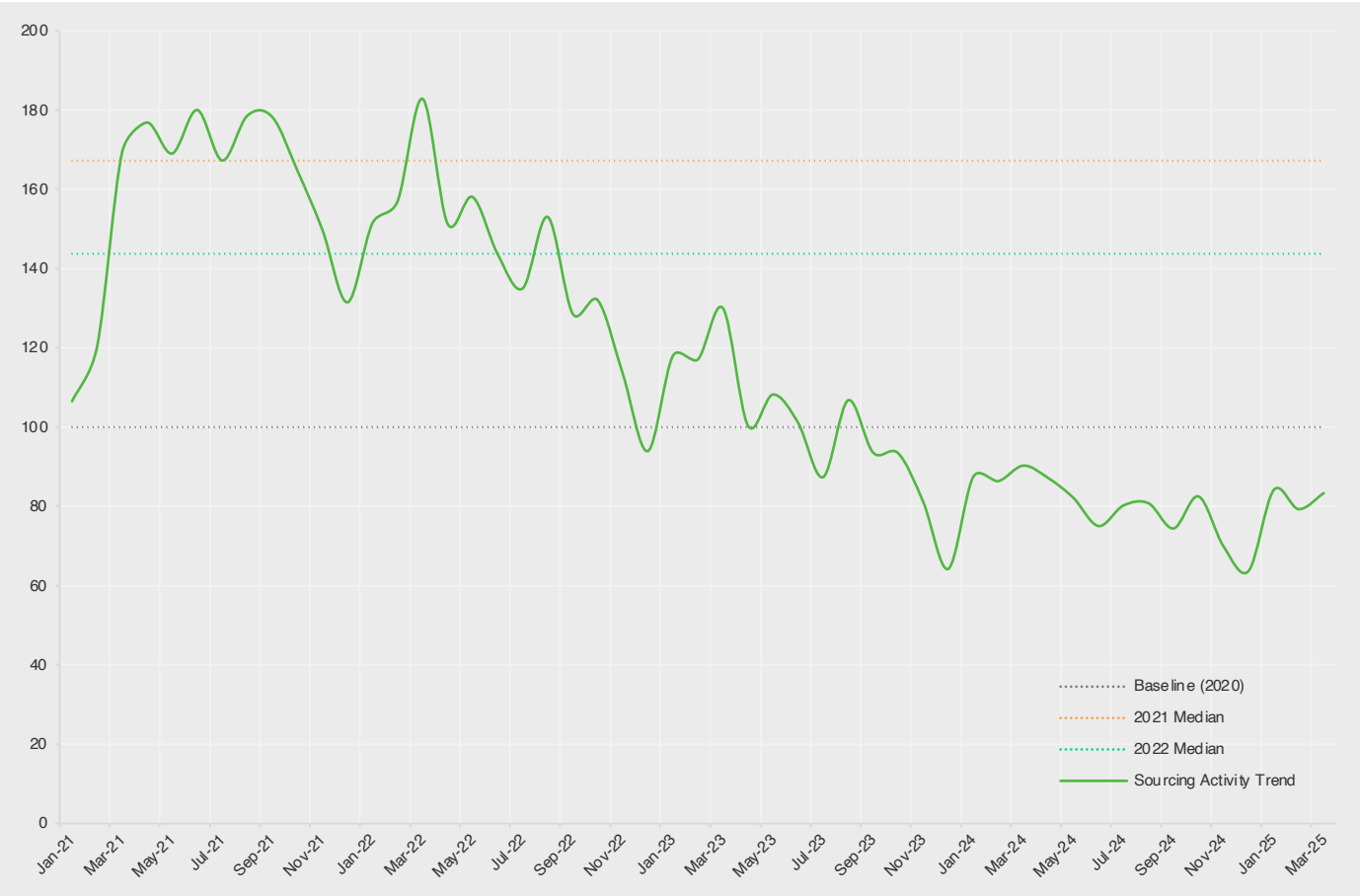
March 2025

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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	6%	-5%	1%
Interconnects	90.5	6%	-4%	2%
Discrete Semiconductors	36.2	5%	-11%	3%
Integrated Circuits	34.5	11%	-12%	3%
Power	26.7	5%	-7%	3%
Electromechanicals	10.9	-8%	-14%	-1%
Embedded Processors and Controllers	10.8	4%	-17%	2%
Optoelectronics	10.0	1%	-13%	2%
Memory	5.4	0%	-18%	1%
Sensors	3.3	12%	-12%	2%
Circuit Protection	2.9	2%	-7%	1%
RF and Wireless	2.6	-4%	-3%	1%

Product Class (Top 15) AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	5%	-3%	2%
Capacitors	75.7	4%	-2%	1%
Resistors	67.7	9%	-6%	2%
Power Circuits	39.9	6%	-7%	2%
Connector Support	35.9	7%	-8%	3%
Diodes	33.8	4%	-14%	2%
Transistors	27.2	5%	-10%	2%
Terminal Blocks	20.9	7%	-3%	3%
Microcontrollers and Processors	18.8	4%	-17%	2%
Optoelectronics	17.0	0%	-13%	2%
Amplifier Circuits	16.3	22%	11%	7%
Inductors	15.7	0%	-19%	0%
Drivers And Interfaces	12.6	11%	-12%	2%
Logic	11.6	5%	-22%	1%
Filters	9.5	10%	-2%	1%

Sourcing Activity Trend: EMEA

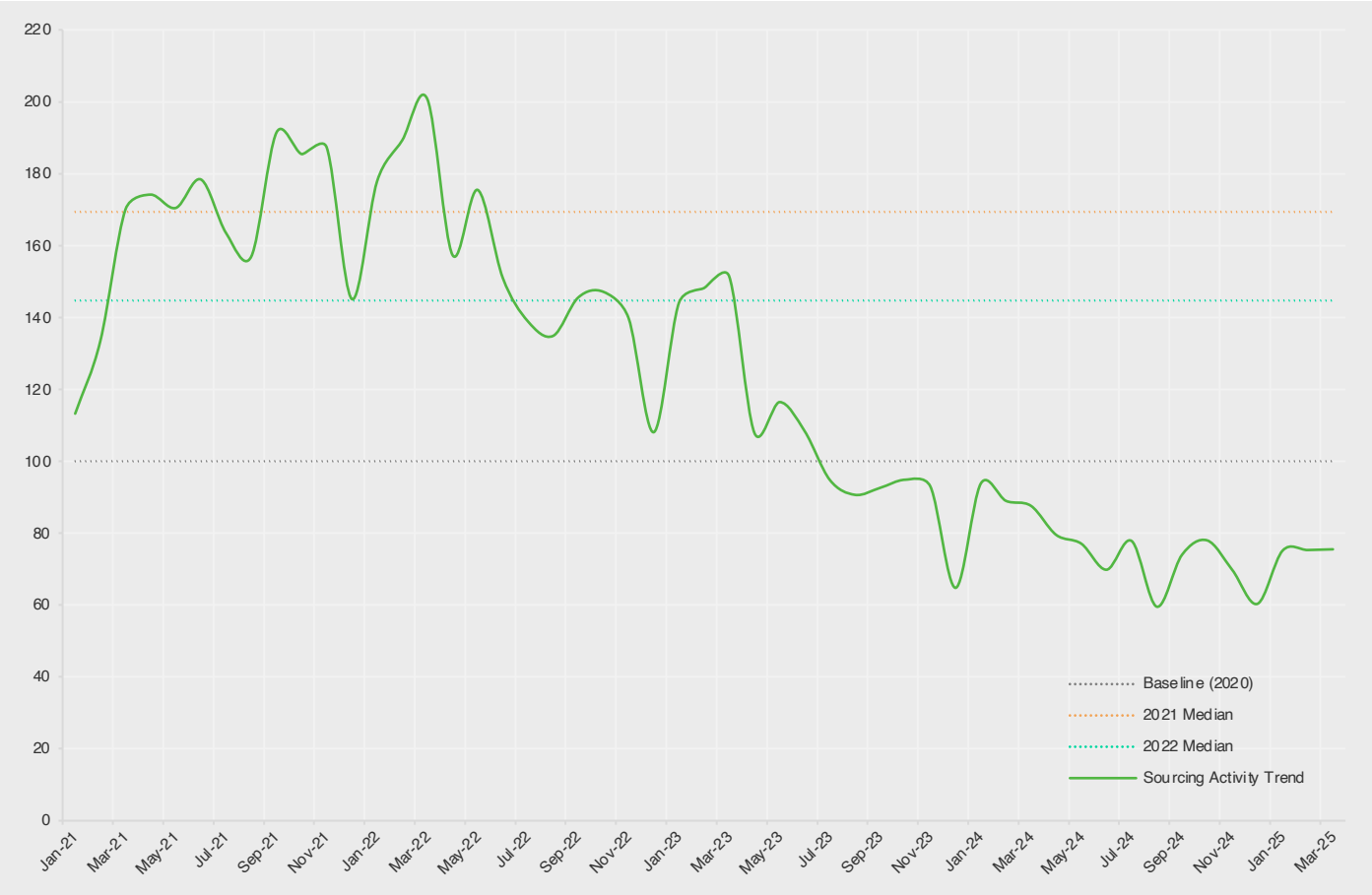
March 2025

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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	6%	-11%	0%
Interconnects	63.2	-4%	-11%	0%
Discrete Semiconductors	44.3	4%	-14%	2%
Integrated Circuits	43.4	-2%	-20%	0%
Power	33.4	1%	-14%	0%
Embedded Processors and Controllers	16.7	-6%	-19%	0%
Optoelectronics	12.8	-4%	-13%	1%
Electromechanicals	11.4	-7%	-18%	-1%
Memory	7.2	-5%	-15%	1%
Sensors	4.4	1%	-22%	1%
Circuit Protection	3.4	17%	1%	3%
RF and Wireless	3.0	-3%	5%	3%

Product Class (Top 15) EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Capacitors	100.0	7%	-5%	0%
Connectors	99.8	-4%	-11%	0%
Resistors	77.9	6%	-14%	0%
Power Circuits	65.3	2%	-14%	0%
Diodes	51.4	1%	-18%	2%
Transistors	47.6	6%	-10%	2%
Microcontrollers and Processors	38.4	-6%	-19%	0%
Optoelectronics	28.6	-2%	-11%	1%
Connector Support	28.2	-7%	-13%	0%
Inductors	26.6	2%	-22%	-1%
Amplifier Circuits	24.2	-6%	-21%	-1%
Drivers And Interfaces	23.1	0%	-17%	0%
Logic	16.7	6%	-26%	-1%
Filters	16.6	5%	-13%	2%
Memory	16.6	-5%	-15%	1%

Sourcing Activity Trend: APAC

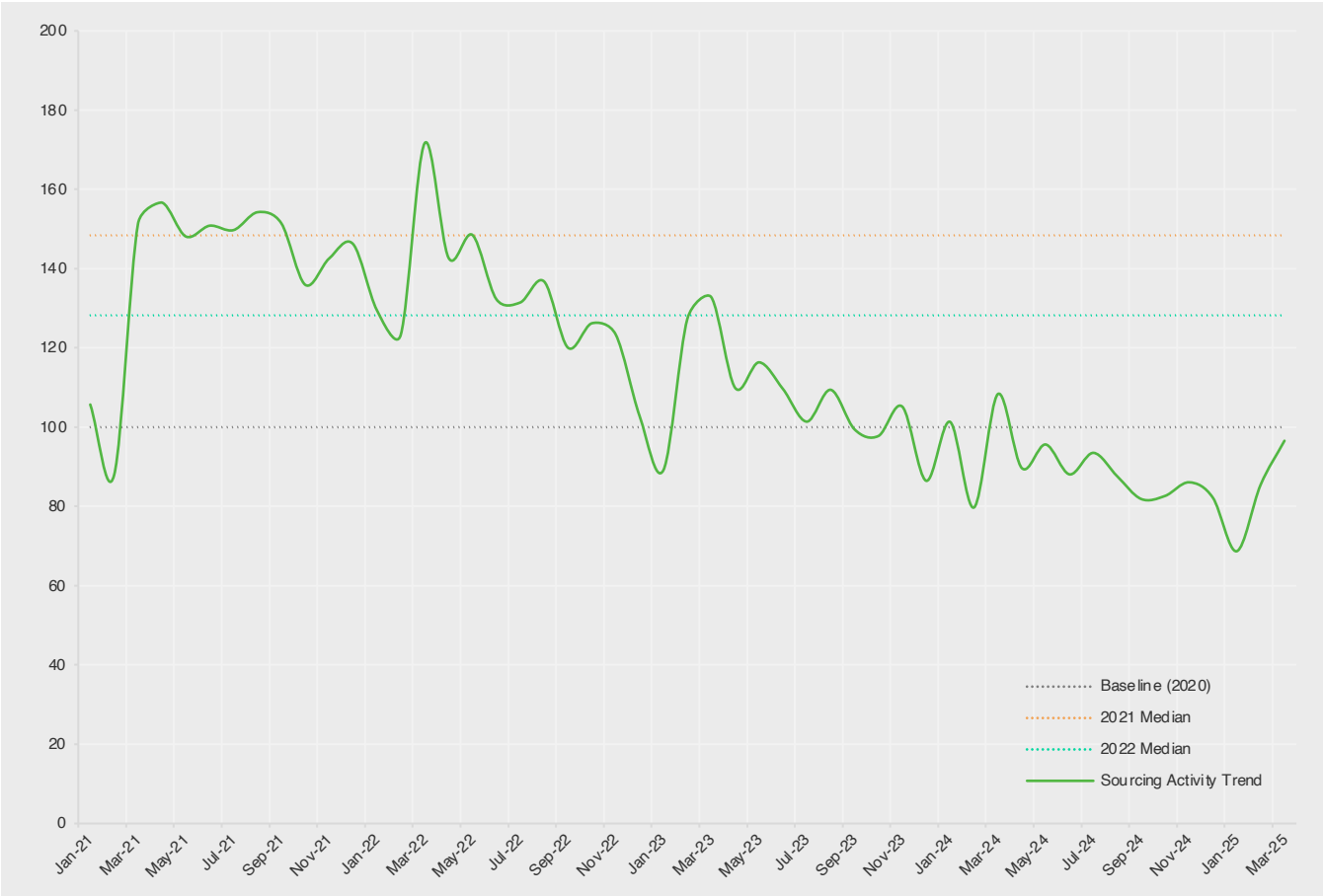
March 2025

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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	16%	0%	4%
Interconnects	74.5	8%	-6%	2%
Integrated Circuits	48.8	12%	-20%	3%
Discrete Semiconductors	43.5	12%	-24%	2%
Power	40.9	16%	-7%	4%
Embedded Processors and Controllers	20.6	17%	-24%	3%
Electromechanicals	12.1	8%	-5%	3%
Optoelectronics	11.8	13%	-9%	3%
Memory	8.6	15%	-24%	2%
RF and Wireless	5.9	12%	1%	3%
Sensors	5.2	20%	-13%	3%
Circuit Protection	3.6	7%	1%	2%

Product Class (Top 15) APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	8%	-6%	2%
Capacitors	85.6	15%	5%	4%
Power Circuits	63.0	17%	-6%	4%
Resistors	60.3	12%	-5%	3%
Diodes	43.3	10%	-23%	2%
Microcontrollers and Processors	39.9	17%	-24%	3%
Transistors	38.6	15%	-27%	2%
Connector Support	30.0	12%	-4%	1%
Inductors	23.0	16%	-12%	3%
Optoelectronics	22.1	13%	-9%	3%
Drivers And Interfaces	21.8	14%	-14%	3%
Amplifier Circuits	17.6	14%	-25%	3%
Filters	17.2	42%	16%	5%
Memory	16.6	15%	-24%	2%
Signal Circuits	15.4	11%	-11%	3%

Recap

March 2025

- Global design and sourcing activities both increased month-over-month in March, following seasonal trends
- Global design activities performed better than the historical average, largely due to strong increase in activities from the APAC region. All product groups and categories observed month-over-month increase in design activities. The following product groups observed the largest increase in design activities across the regions: passives (+19%), ICs (+18%), power (+18%), embedded processors and controllers (+23%), sensors (+28%), and rf and wireless (+33%)
- Global sourcing activities increased month-over-month, but growth was below seasonal average for the month. Increase in sourcing activities were observed in the APAC and Americas region, while the EMEA region flat month-over-month. Product groups that observed the largest increase in sourcing activity globally included the following: passives (+11%), power (+11%), embedded processors and controllers (+10%), sensors (+14%), ICs and discrete semiconductors (+9%)
- Q2 2025 projections: global design activities are expected to remain flat quarter-over-quarter, while global sourcing activities are expected to decrease between -7% to -9% quarter-over-quarter

