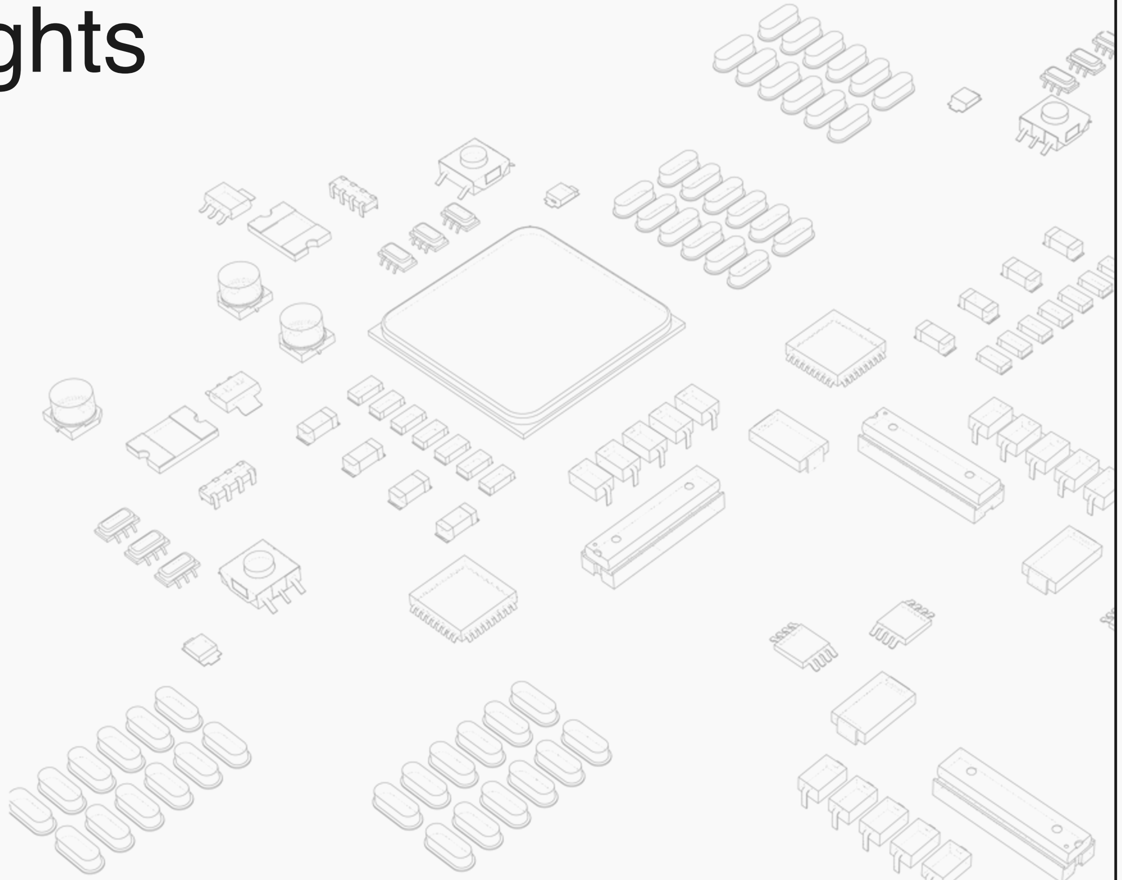
Supplyframe

Design-to-Source Monthly Insights

September 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.

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What We Saw Across The Supplyframe Network

September 2025

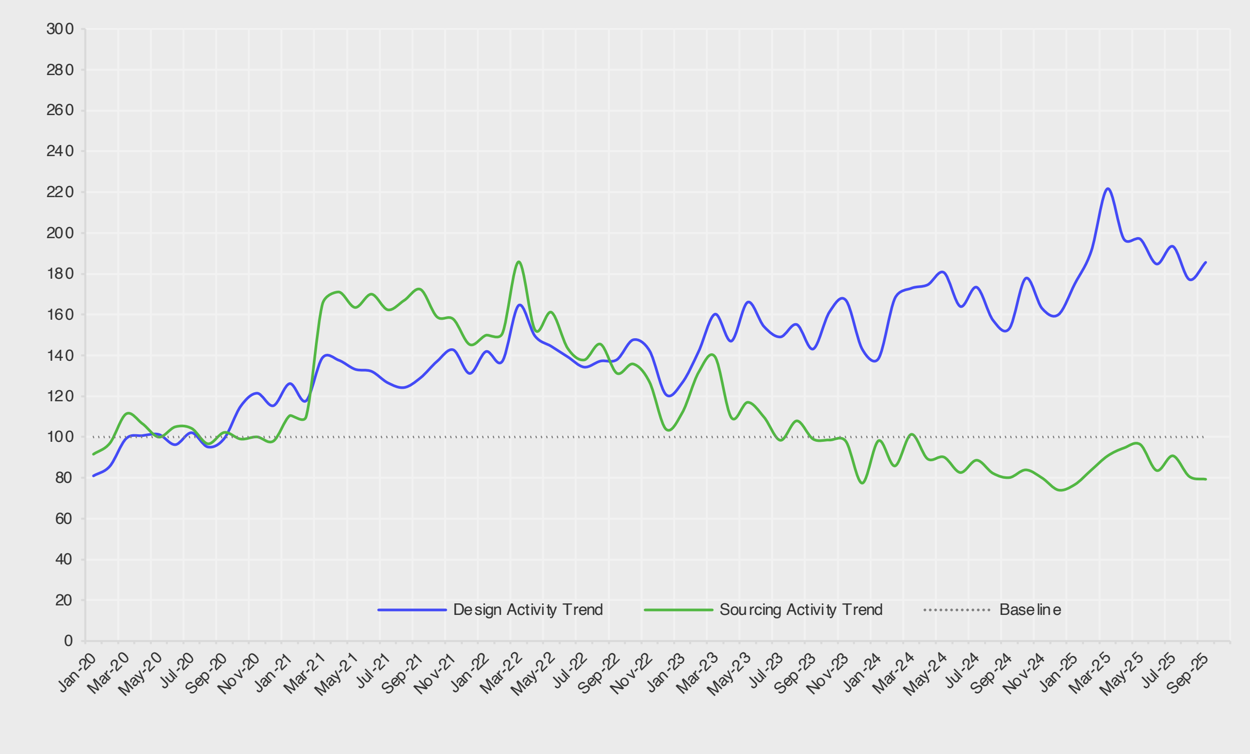
Key Highlights

- Global design and sourcing activities trended better than expected in September.
- Global design activities increased +5% month-over-month and +21% year-over-year. Historically, global design activities have remained flat to down -1% month-over-month.
- Global sourcing activities decreased -2% month-over-month and -1% year-over-year, trending better than what we have historically observed from August to September (average -5%).
- For the quarter, global design and sourcing activities trended as expected. Global design activities decreased -4% quarter-over-quarter (vs. -5% forecast), and global sourcing activities decreased -9% quarter-over-quarter (vs. -10% forecast). Compared to prior year, global design activities increased +15% and global sourcing activities remained flat in calendar Q3.
- Global design and sourcing activities continued to be concentrated in the following verticals: aerospace, defense, industrial machinery and factory automation, robotics, consumer electronics, and communication equipment.

Global Performance

DESIGN ACTIVITES	**+4.8% M/M** **+21.2% Y/Y**	**SOURCING ACTIVITES**	**-1.7% M/M** **-1.0% 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.

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Design Activity Summary

September 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 trended better than expected.

- Global design activities increased +5% month-over-month and +21% year-over-year for September. For the quarter, global design activities decreased -4% vs. prior quarter but increased +15% vs. prior year.
- Increase in design activities were observed across both EMEA and the Americas, while the APAC region observed a decrease in design activities compared to prior month. All regions observed increases in design activities compared to prior year.
- In the EMEA regions, the following countries observed notable increases in design activities: the United Kingdom (+11%); Italy (+42%); France (+27%); Spain (+48%); and Switzerland (+26%). In these countries, the following product categories observed the largest increases in activities: power circuits (+23%); diodes (+22%); transistors (+16%); logic (+51%); amplifier circuits (+27%); and signal circuits (+25%).
- In the Americas region, the United States, Brazil, Canada, and Mexico all observed increases in design activities. In these countries, the following product categories observed the largest increases in activities: capacitors (+18%); optoelectronics (+14%); microcontrollers and processors (+15%); and amplifier circuits (+13%).
- In the APAC region, notable increases in design activities were observed in South Korea (+19%) and Japan (+8%). Design activities in China and Vietnam remained flat, while activities decreased slightly in India (-1.8%).

Table 1. Design Activity Summary

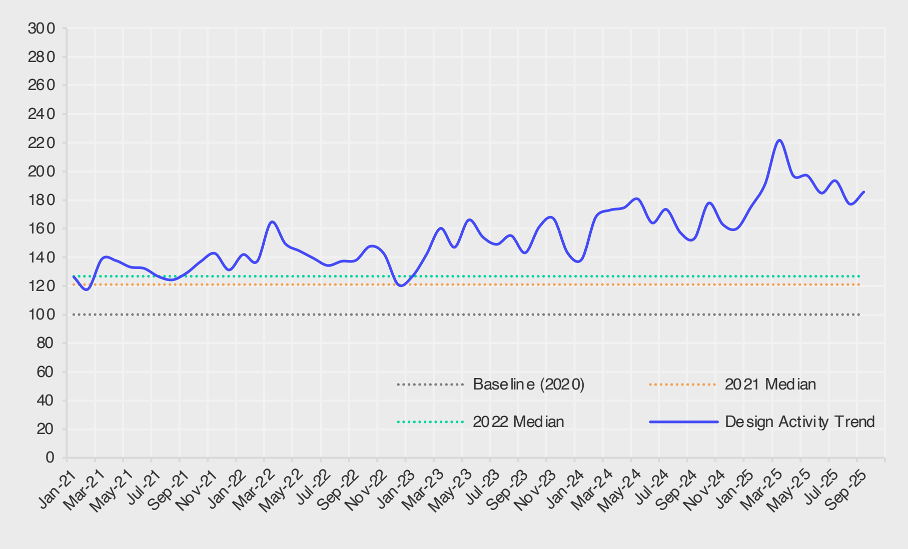
	vs. Prior Month	vs. Prior Year	6mo. CMGR
Global	4.8%	21.2%	-2.9%

Region	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
EMEA	100.0	9.6%	24.2%	-3.9%
APAC	73.2	-1.6%	16.7%	-2.3%
AMER	50.1	5.3%	22.2%	-1.9%

Top 10 Countries / Territories

Country / Territory	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	2.8%	31.6%	-1.4%
India	55.6	-1.8%	18.4%	-1.0%
China (incl. Hong Kong)	48.1	0.9%	10.6%	-4.7%
Germany	43.3	-2.1%	23.1%	-2.9%
Republic of Korea	26.9	19.4%	69.0%	1.5%
United Kingdom	24.1	11.1%	1.6%	-5.4%
Italy	23.0	42.2%	42.8%	-3.2%
France	19.6	26.7%	5.9%	-4.6%
Japan	16.4	12.2%	15.0%	0.1%
Taiwan	15.4	-15.1%	20.2%	-2.4%

Chart 2. Global Design Activity Trend



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Design Activity Trend: Americas

September 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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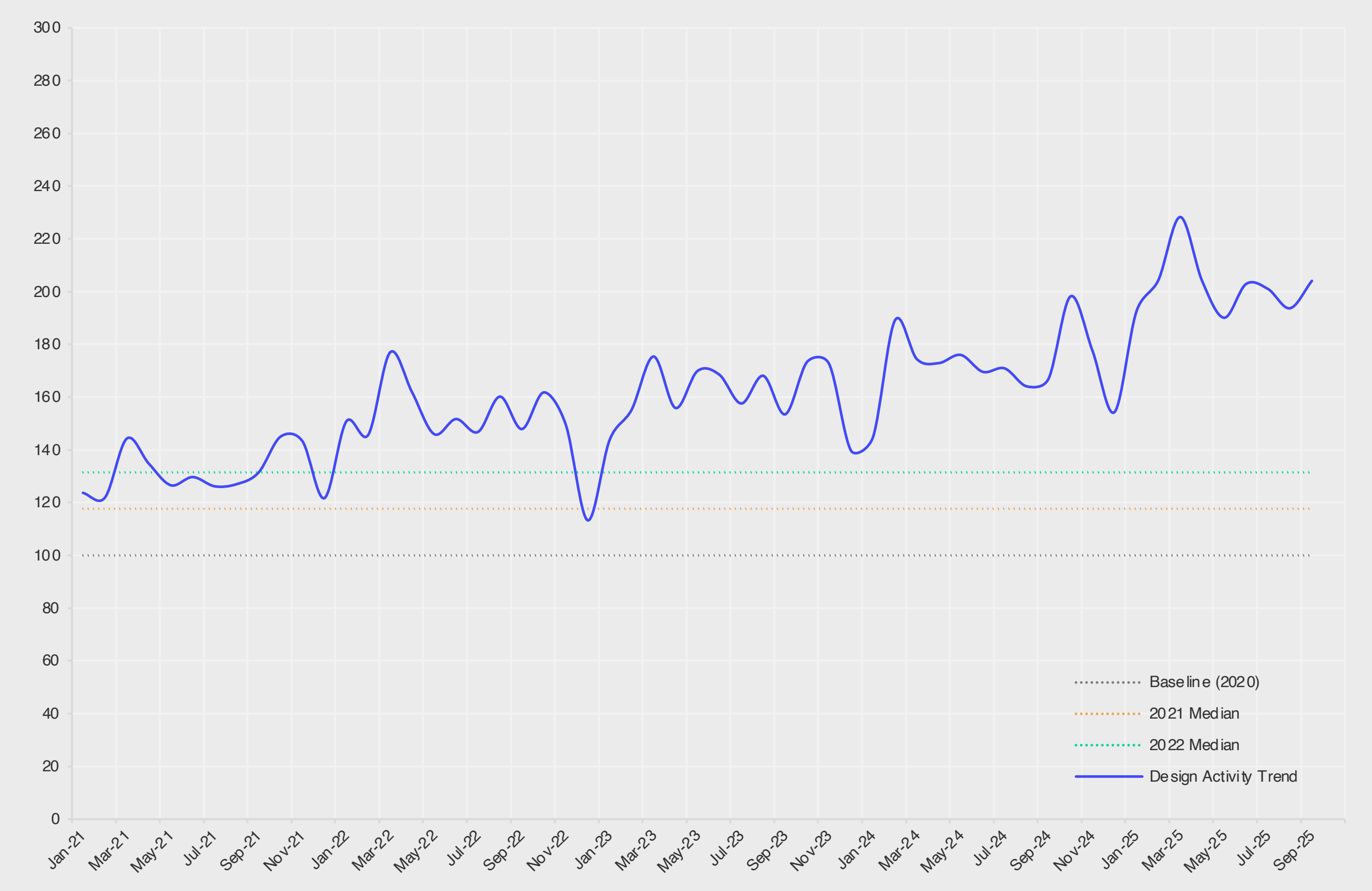
Chart 3. Americas Design Activity Trend



Product Group | AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	10%	28%	-1%
Interconnects	66.4	-3%	13%	-3%
Power	43.2	10%	33%	-1%
Integrated Circuits	41.5	7%	8%	-2%
Discrete Semiconductors	39.6	5%	20%	-3%
Electromechanicals	15.2	7%	12%	-2%
Optoelectronics	14.9	16%	23%	-2%
Embedded Processors and Controllers	14.1	15%	22%	-4%
Sensors	7.4	5%	26%	-1%
Memory	4.2	18%	28%	-1%
RF and Wireless	3.5	-5%	41%	-1%
Circuit Protection	1.2	-24%	7%	-6%

Product Class (Top 15) | AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-2%	14%	-3%
Capacitors	78.2	20%	43%	0%
Power Circuits	71.1	10%	36%	0%
Resistors	69.3	3%	24%	-1%
Diodes	43.8	7%	26%	-2%
Transistors	28.4	1%	14%	-4%
Optoelectronics	26.7	17%	22%	-2%
Microcontrollers and Processors	26.2	15%	22%	-4%
Inductors	20.3	4%	5%	-3%
Terminal Blocks	18.4	-3%	10%	-6%
Amplifier Circuits	18.0	15%	26%	0%
Drivers And Interfaces	17.2	-5%	2%	-2%
Logic	16.6	6%	8%	-1%
Switches	15.9	20%	15%	-1%
Signal Circuits	13.8	18%	-5%	-3%

Design Activity Trend: EMEA

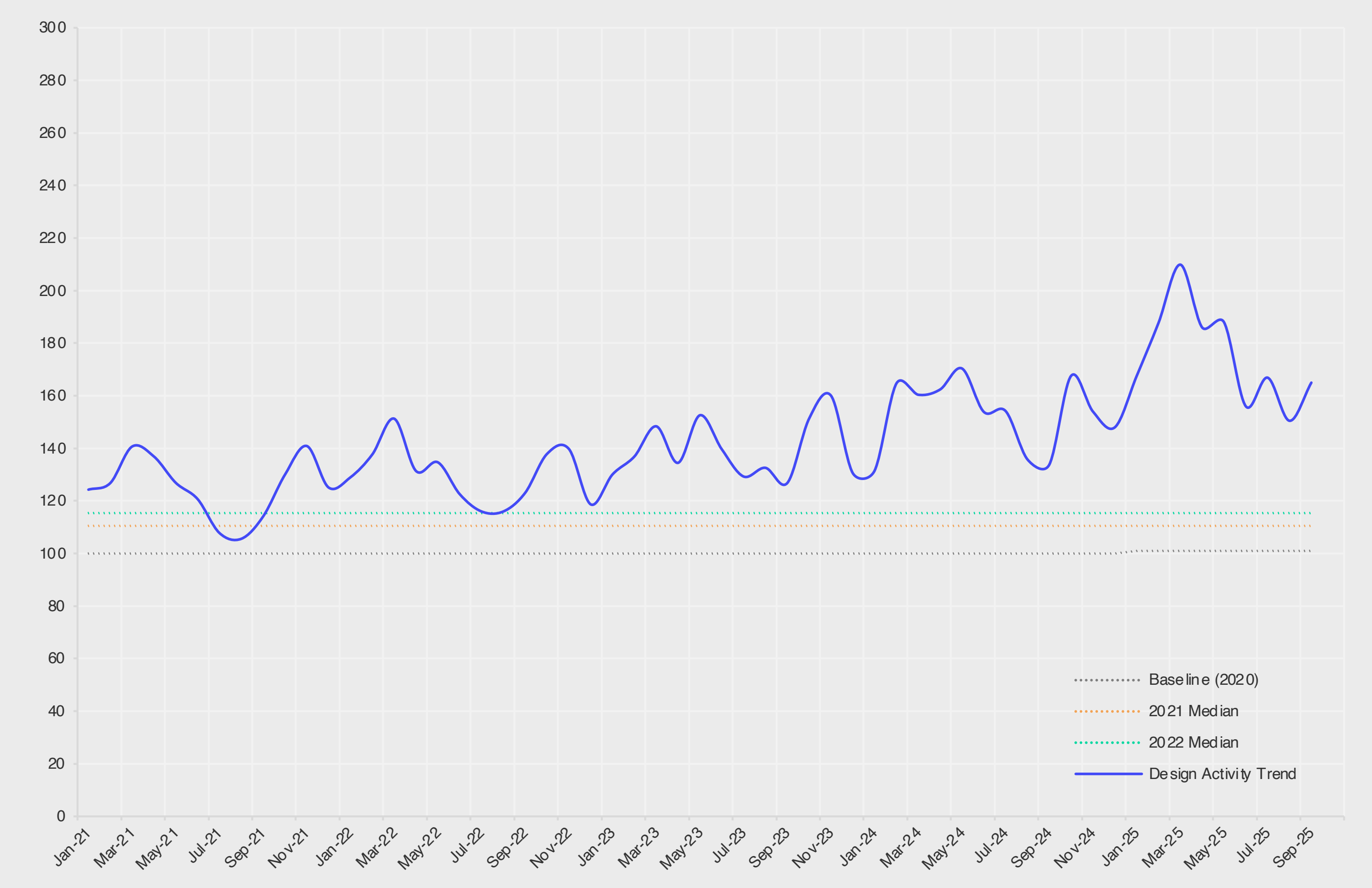
September 2025

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.

Chart 4. EMEA Design Activity Trend



Product Group | EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	6%	23%	-5%
Interconnects	80.6	11%	18%	-4%
Integrated Circuits	52.1	14%	24%	-4%
Discrete Semiconductors	49.1	7%	23%	-4%
Power	48.1	10%	32%	-3%
Embedded Processors and Controllers	18.6	15%	28%	-4%
Electromechanicals	17.9	12%	15%	-4%
Optoelectronics	15.3	8%	13%	-5%
Sensors	5.8	20%	25%	-5%
Memory	4.0	7%	4%	-4%
RF and Wireless	3.7	12%	37%	-5%
Circuit Protection	1.5	-7%	-6%	-8%

Product Class (Top 15) | EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	11%	17%	-4%
Power Circuits	70.2	9%	31%	-3%
Capacitors	59.2	5%	21%	-5%
Resistors	56.4	10%	24%	-4%
Diodes	45.2	4%	22%	-4%
Transistors	32.8	12%	25%	-4%
Microcontrollers and Processors	30.0	15%	28%	-4%
Terminal Blocks	26.3	13%	24%	-4%
Inductors	26.2	6%	23%	-5%
Optoelectronics	23.6	6%	9%	-5%
Drivers And Interfaces	21.1	11%	19%	-3%
Amplifier Circuits	17.9	9%	29%	-4%
Logic	17.4	22%	37%	-3%
Signal Circuits	14.8	23%	16%	-4%
Switches	14.5	7%	14%	-5%

Design Activity Trend: APAC

September 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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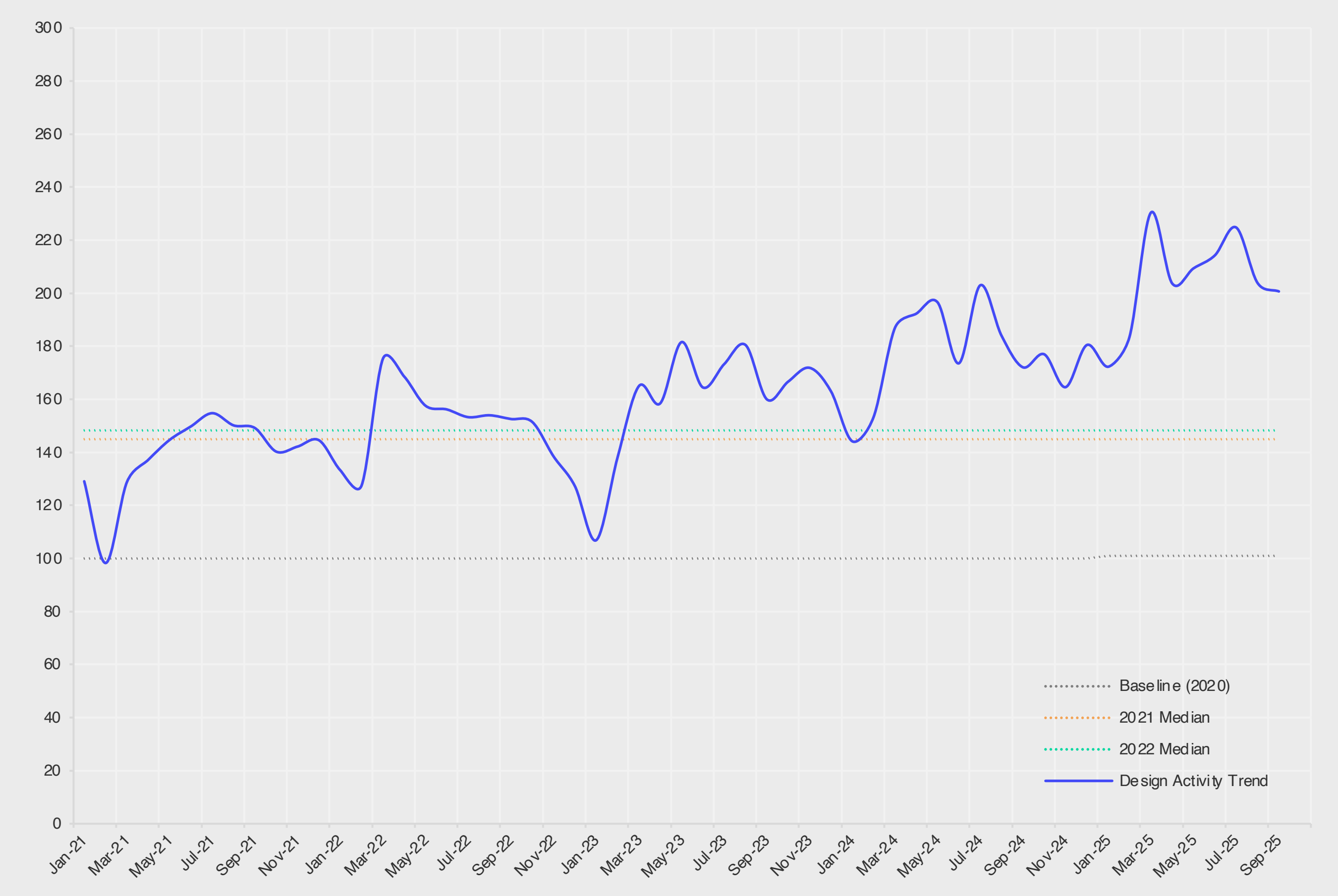
Chart 5. APAC Design Activity Trend



Product Group | APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-1%	23%	-2%
Interconnects	64.4	-6%	5%	-2%
Discrete Semiconductors	55.0	0%	17%	-1%
Integrated Circuits	53.8	1%	9%	-4%
Power	49.2	0%	27%	-2%
Embedded Processors and Controllers	17.6	-4%	15%	-5%
Electromechanicals	14.2	5%	8%	-3%
Optoelectronics	13.2	-7%	-7%	-4%
Sensors	5.2	-4%	34%	-4%
Memory	5.1	11%	22%	-1%
RF and Wireless	4.7	8%	38%	-2%
Circuit Protection	1.5	-4%	-2%	-5%

Product Class (Top 15) | APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-8%	5%	-2%
Power Circuits	82.0	-1%	28%	-2%
Capacitors	74.5	-3%	23%	-2%
Resistors	60.3	2%	23%	-1%
Diodes	58.3	-4%	14%	-2%
Transistors	41.8	8%	23%	0%
Microcontrollers and Processors	32.4	-4%	15%	-5%
Drivers And Interfaces	27.9	10%	21%	-2%
Inductors	24.9	-6%	24%	-4%
Optoelectronics	23.3	-7%	-8%	-4%
Amplifier Circuits	22.2	-2%	14%	-4%
Logic	18.5	-3%	14%	-4%
Signal Circuits	16.1	-6%	-10%	-4%
Filters	15.5	2%	20%	-2%
Terminal Blocks	15.4	-1%	1%	-4%

Sourcing Activity Summary

September 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 decreased -2% month-over-month and -1% year-over-year.

- Global sourcing activities decreased -2% month-over-month and -1% year-over-year, trending better than what we have historically observed from August to September (average -5%). Decreases in month-over-month sourcing activities were observed in the APAC and Americas regions, while sourcing activities increased in the EMEA region month-over-month.

- In the EMEA region, Germany, Italy, France, Poland, Spain, and the Netherlands all observed strong increases in sourcing activities. In these countries, the following product categories observed the largest increases in sourcing activities: transistors (+43%); microcontrollers and processors (+52%); drivers and interfaces (+43%); logic (+79%) and connectors (+37%).

- In the APAC region, Singapore and Japan were the only two countries that observed increases in sourcing activities from August to September. All other countries in the region observed month-over-month decreases in activities. When compared to prior year, India, South Korea, Malaysia, Singapore, Vietnam, and Japan all observed increase in sourcing activities. Product categories that observed strong demand in the region included: connectors, capacitors, power circuits, resistors, diodes, and microcontrollers and processors.

- In the Americas region, microcontroller and processors observed a +3% month-over-month increase in sourcing demand. All other product categories observed a month-over-month decrease in demand. Compared to prior year, power circuits, microcontrollers and processors, and inductors observed strong growth in sourcing demand.

Table 2. Sourcing Activity Summary

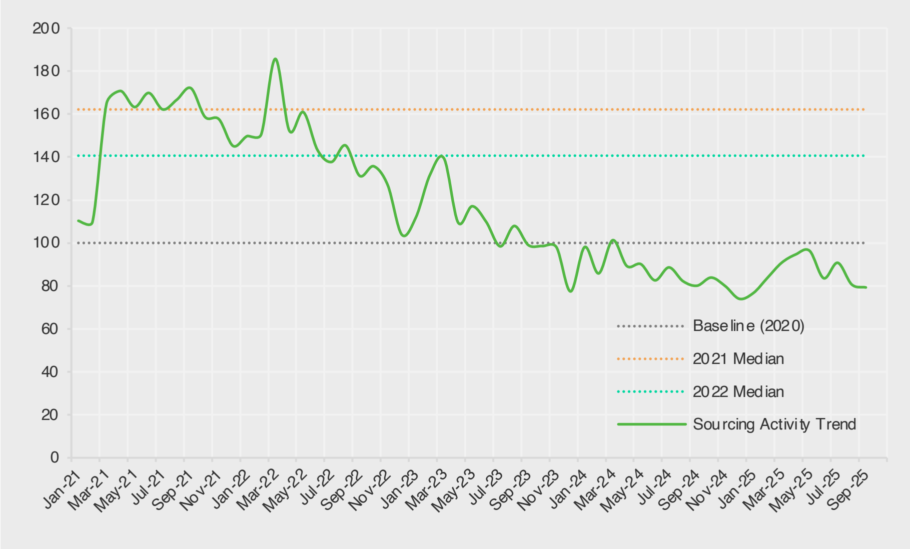
	vs. Prior Month	vs. Prior Year	6mo. CMGR
Global	-1.7%	-1.0%	-2.2%

Region	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
APAC	100.0	-2.9%	1.7%	-2.4%
AMER	57.2	-7.9%	0.1%	-1.8%
EMEA	31.1	17.9%	-10.7%	-2.2%

Top 10 Countries / Territories

Country / Territory	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
China (incl. Hong Kong)	100.0	-2.4%	-2.8%	-3.7%
United States	88.1	-9.5%	-6.8%	-3.0%
India	34.0	-2.1%	6.3%	0.5%
Republic of Korea	24.3	-2.5%	11.0%	-3.5%
Germany	15.3	9.4%	-2.5%	-1.6%
Taiwan	13.2	-10.0%	-11.2%	-3.1%
Malaysia	11.0	-10.0%	7.5%	-0.7%
Brazil	9.6	-11.6%	58.8%	9.1%
Canada	9.1	8.3%	-14.8%	-4.5%
Singapore	8.8	8.0%	4.4%	-0.8%

Chart 6. Global Sourcing Activity Trend



Sourcing Activity Trend: Americas

September 2025

Sourcing Activity Index

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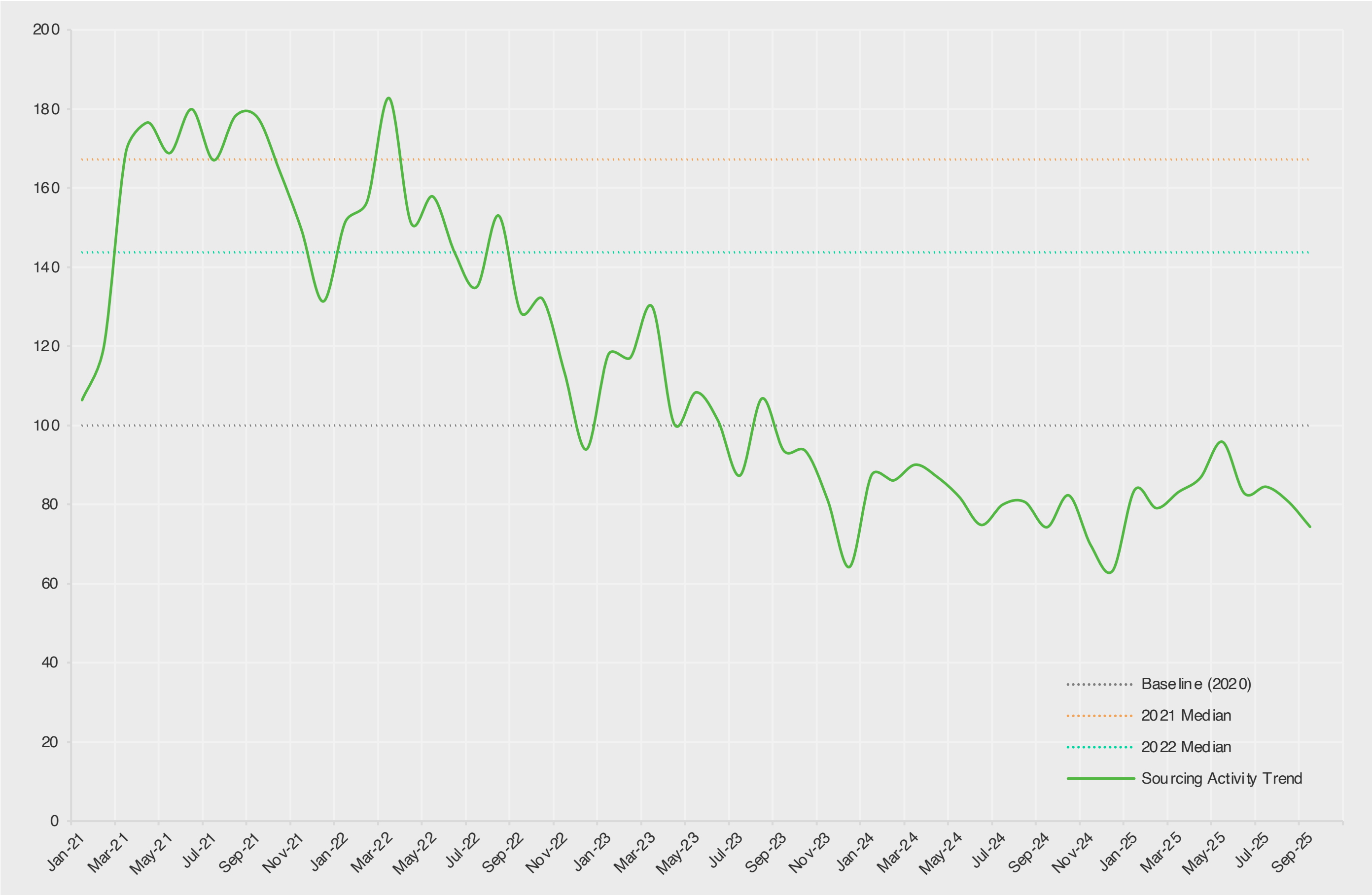
Chart 7. Americas Sourcing Activity Trend



Product Group | AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-6%	-3%	-2%
Interconnects	88.1	-8%	0%	-2%
Discrete Semiconductors	35.7	-10%	2%	-2%
Integrated Circuits	30.7	-24%	-1%	-3%
Power	27.0	-3%	6%	-2%
Electromechanicals	12.4	-1%	-1%	1%
Embedded Processors and Controllers	11.9	2%	10%	0%
Optoelectronics	10.4	-4%	2%	-1%
Memory	5.4	-1%	-6%	-2%
Sensors	3.7	-3%	10%	-1%
RF and Wireless	3.4	0%	16%	2%
Circuit Protection	3.0	-9%	-2%	-1%

Product Class (Top 15) | AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-8%	-1%	-2%
Capacitors	74.4	-8%	-10%	-3%
Resistors	71.1	-5%	2%	-2%
Power Circuits	41.8	-4%	5%	-1%
Connector Support	36.4	-8%	5%	-2%
Diodes	34.0	-9%	1%	-2%
Transistors	28.5	-11%	3%	-2%
Microcontrollers and Processors	21.5	2%	10%	0%
Terminal Blocks	21.4	-6%	1%	-3%
Inductors	18.8	-2%	7%	1%
Optoelectronics	18.4	-4%	3%	-1%
Amplifier Circuits	12.6	-4%	3%	-7%
Drivers And Interfaces	12.3	-8%	-1%	-2%
Logic	11.7	-17%	-6%	-2%
Memory	9.8	-1%	-6%	-2%

Sourcing Activity Trend: EMEA

September 2025

Sourcing Activity Index

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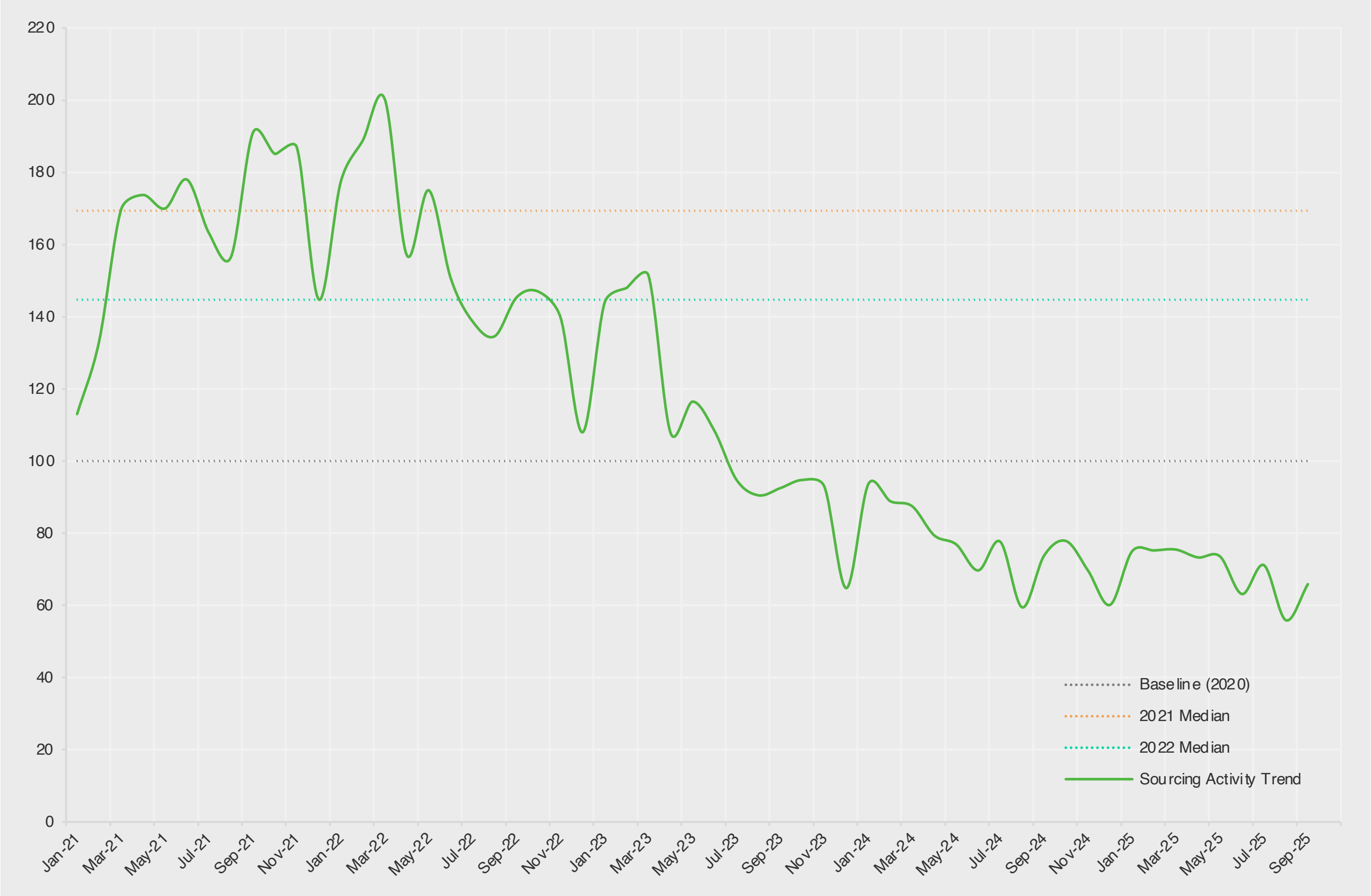
Chart 8. EMEA Sourcing Activity Trend



Product Group | EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	15%	-15%	-3%
Interconnects	66.0	21%	-13%	-2%
Discrete Semiconductors	45.9	13%	-2%	-2%
Integrated Circuits	45.7	19%	-10%	-2%
Power	35.5	19%	-7%	-2%
Embedded Processors and Controllers	18.3	25%	-11%	-2%
Electromechanicals	12.7	28%	-12%	-1%
Optoelectronics	12.0	18%	-16%	-4%
Memory	6.6	13%	-18%	-4%
Sensors	4.9	18%	-8%	-2%
RF and Wireless	3.4	25%	11%	-2%
Circuit Protection	3.3	16%	-1%	-3%

Product Class (Top 15) | EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	17%	-16%	-3%
Capacitors	95.1	16%	-17%	-3%
Resistors	77.7	14%	-14%	-3%
Power Circuits	68.8	18%	-7%	-2%
Diodes	52.4	14%	-2%	-2%
Transistors	49.0	14%	0%	-2%
Microcontrollers and Processors	41.4	25%	-11%	-2%
Connector Support	30.5	25%	-7%	-1%
Inductors	28.4	13%	-13%	-1%
Optoelectronics	26.2	19%	-17%	-4%
Drivers And Interfaces	25.1	23%	-2%	-1%
Amplifier Circuits	23.6	19%	-19%	-3%
Logic	19.2	22%	-7%	0%
Terminal Blocks	17.2	35%	-3%	-2%
Filters	15.7	26%	-10%	-4%

Sourcing Activity Trend: APAC

September 2025

Sourcing Activity Index

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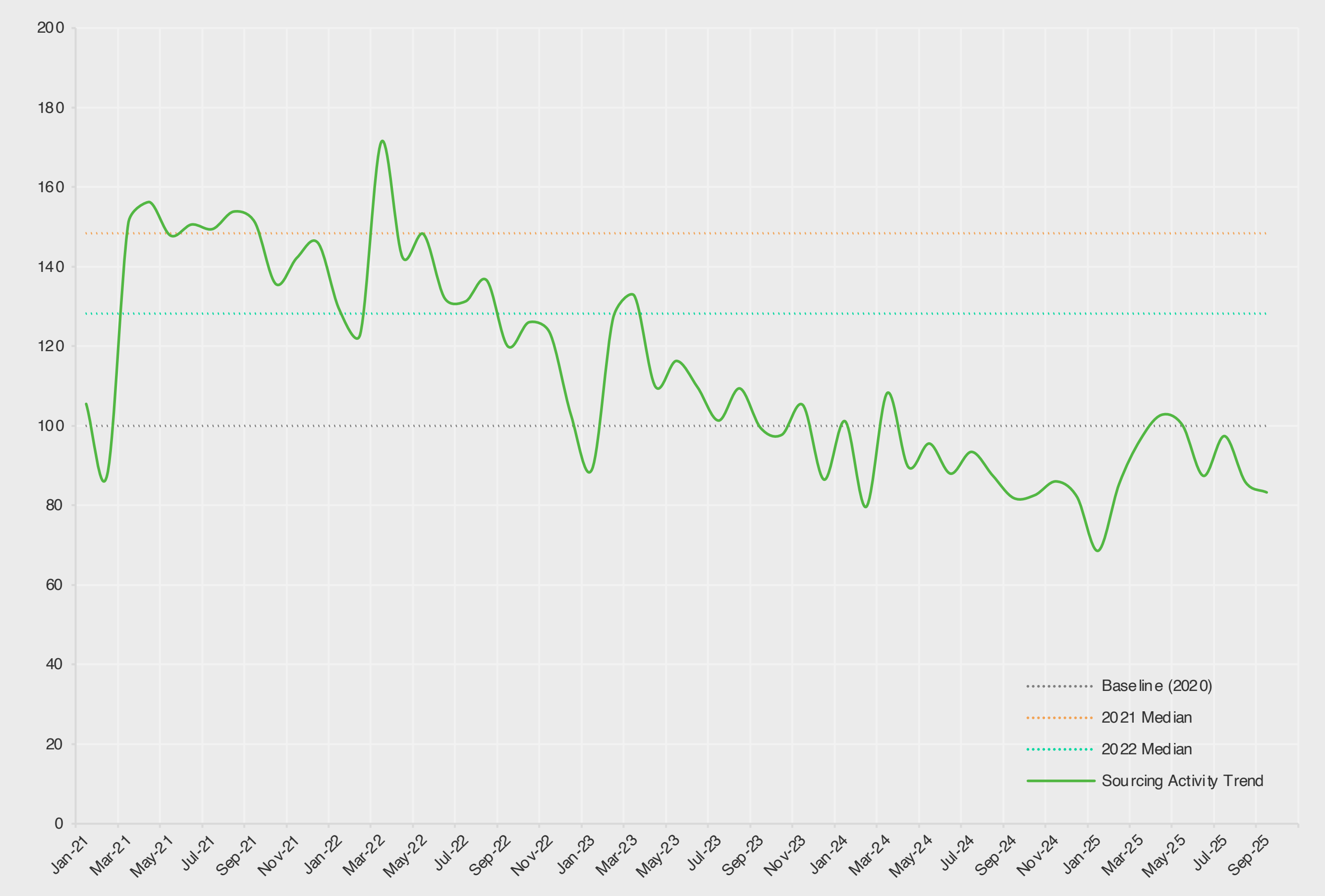
Chart 9. APAC Sourcing Activity Trend



Product Group | APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-5%	4%	-3%
Interconnects	81.4	-1%	1%	-2%
Integrated Circuits	49.7	-4%	4%	-2%
Discrete Semiconductors	44.3	-4%	-4%	-3%
Power	40.8	-2%	4%	-3%
Embedded Processors and Controllers	20.1	-2%	-5%	-4%
Electromechanicals	12.6	-2%	5%	-2%
Optoelectronics	12.0	4%	3%	-3%
Memory	9.1	0%	1%	-2%
RF and Wireless	6.4	-2%	3%	-2%
Sensors	5.6	2%	2%	-2%
Circuit Protection	3.8	-11%	-3%	-3%

Product Class (Top 15) | APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-2%	1%	-2%
Capacitors	77.2	-7%	3%	-3%
Power Circuits	58.6	-2%	5%	-3%
Resistors	58.1	-4%	7%	-2%
Diodes	41.7	-5%	-2%	-2%
Microcontrollers and Processors	35.9	-2%	-5%	-4%
Transistors	35.3	-3%	-6%	-3%
Connector Support	29.9	1%	0%	-1%
Inductors	21.6	-6%	1%	-3%
Amplifier Circuits	20.9	-6%	27%	1%
Optoelectronics	20.8	4%	4%	-3%
Drivers And Interfaces	19.3	0%	-1%	-3%
Memory	16.3	0%	1%	-2%
Logic	15.0	4%	8%	-1%
Terminal Blocks	14.9	3%	7%	-1%

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Recap

September 2025

- Global design and sourcing activities trended better than expected in September.
- Global design activities increased +5% month-over-month and +21% year-over-year. Historically, global design activities have remained flat to down -1% on average.
- Global sourcing activities decreased -2% month-over-month and -1% year-over-year, trending better than what we have historically observed from August to September (average -5%).
- Global design and sourcing activities continued to be concentrated in the following verticals: aerospace, defense, industrial machinery and factory automation, robotics, consumer electronics, and communication equipment.
- For calendar Q4, we project global design activities to increase +5% quarter-over-quarter and global sourcing activities to decrease -9% quarter-over-quarter.