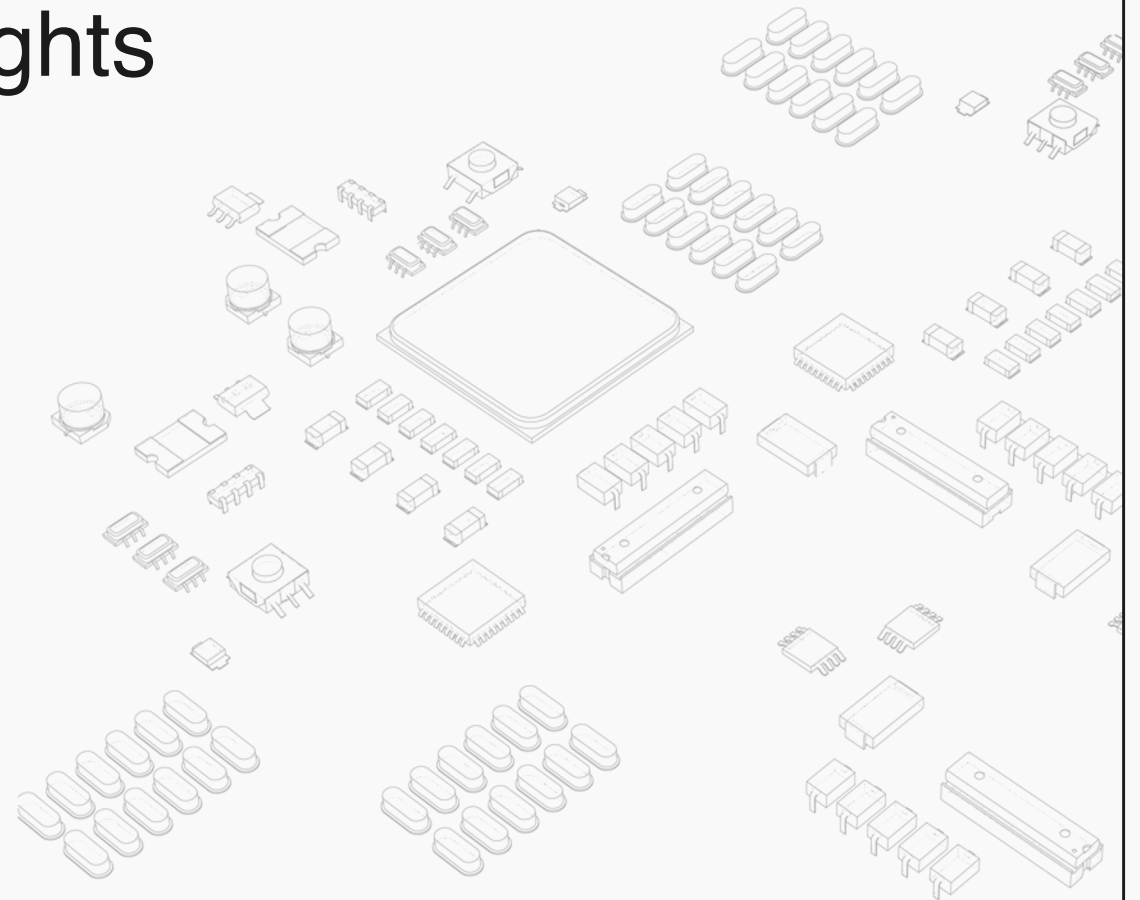




Design-to-Source Monthly Insights

March 2026



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 Supplyframe Network

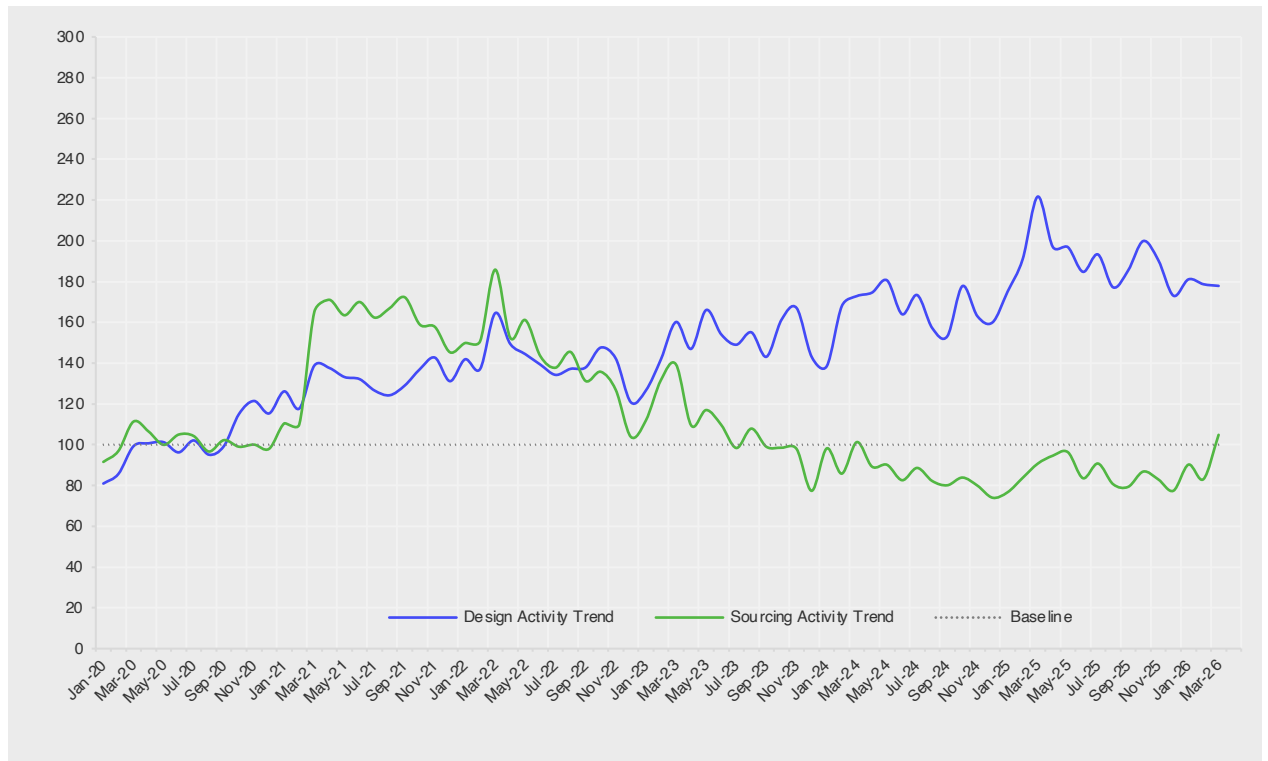
March 2026

- In March, global design activities remained flat, while global sourcing activities increased compared to the prior month.
- While global design activities continued to remain high in March, its month-over-month performance fell below the seasonal average. Historically, global design activities have increased on average +10% from February to March.
- Global sourcing activities fared better than the seasonal average for March, increasing +26% month-over-month this year compared to the +20% we have historically seen during the same periods.
- As a result of the lower-than-expected month-over-month increase in activities, global design activities decreased -5% quarter-over-quarter in Q1 2026.
- Global sourcing activities trended as expected in Q1, increasing +13% vs. Q4 2025.
- For Q2 2026, we anticipate global design activities to increase +3% quarter-over-quarter, and global sourcing activities to remain flat to decrease -4% quarter-over-quarter.

Global Performance

DESIGN ACTIVITES	-0.4% M/M	SOURCING ACTIVITES	+26.1% M/M
	-19.8% Y/Y		+15.6% 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 2026

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 deviated from seasonal trends in March.

- Historically, global design activities have increased on average +10% month-over-month from February to March. All regions would observe month-over-month increases with the largest increase in the APAC region (avg. +18% increase from February to March).
- This year however, global design activities remained flat month-over-month in March as growth in the APAC region was lower than what we have observed in the last three years. Furthermore, both the EMEA and Americas regions did not observe any increases in month-over-month design activities.
- In the APAC region, India, South Korea, Japan, and Australia all observed month-over-month decreases in design activities, which contributed to the regions lower growth rate this year. Historically, all five countries would have observed month-over-month increases in activities from February to March. China and Taiwan observed activities that aligned with seasonal trends – increase in activities month-over-month.
- In the Americas region, the United States and Mexico observed decreases in month-over-month design activities, while Canada and Brazil aligned with seasonal trends and observed increases in design activities.
- In the EMEA region, design activities were down month-over-month across all the top countries: Germany, the United Kingdom, Italy, France, and Spain.

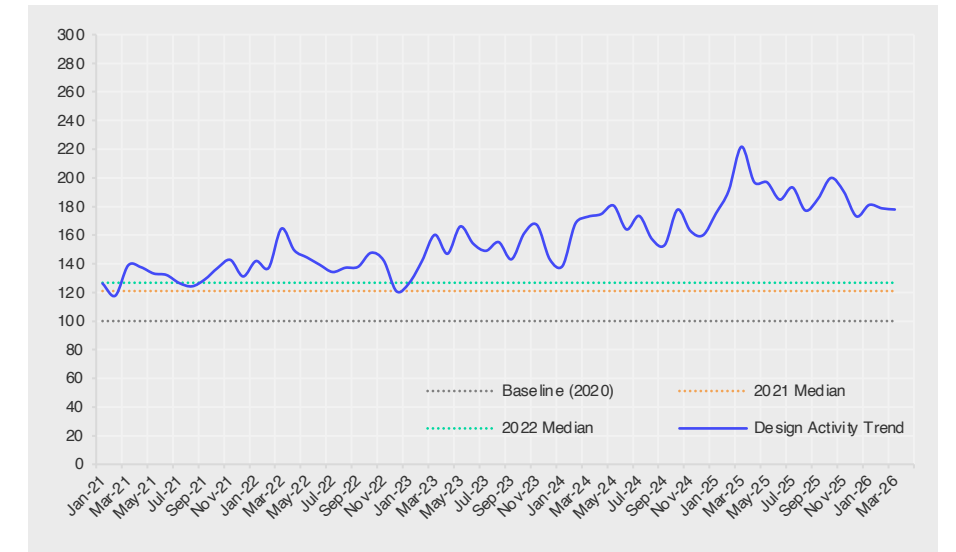
Table 1. Design Activity Summary

		vs. Prior Month	vs. Prior Year	6mo. CMGR
Global		-0.4%	-19.8%	-0.7%
Region	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
EMEA	100.0	-4.0%	-19.3%	0.4%
APAC	60.8	6.0%	-26.0%	-2.6%
AMER	48.5	-0.4%	-11.6%	-0.2%

Top 10 Countries / Territories

Country / Territory	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	-4.5%	-13.0%	-0.9%
India	57.1	-7.2%	-8.6%	-0.5%
Germany	45.8	-1.4%	-16.1%	0.0%
China (incl. Hong Kong)	34.8	50.2%	-48.9%	-6.1%
United Kingdom	26.8	-9.4%	-24.2%	0.9%
Italy	26.0	-6.6%	-11.6%	1.2%
Republic of Korea	25.0	14.0%	-3.7%	-2.1%
France	21.0	-4.8%	-23.6%	0.2%
Spain	19.0	-0.9%	-9.6%	4.5%
Canada	16.8	3.2%	5.9%	7.7%

Chart 2. Global Design Activity Trend



Design Activity Trend: Americas

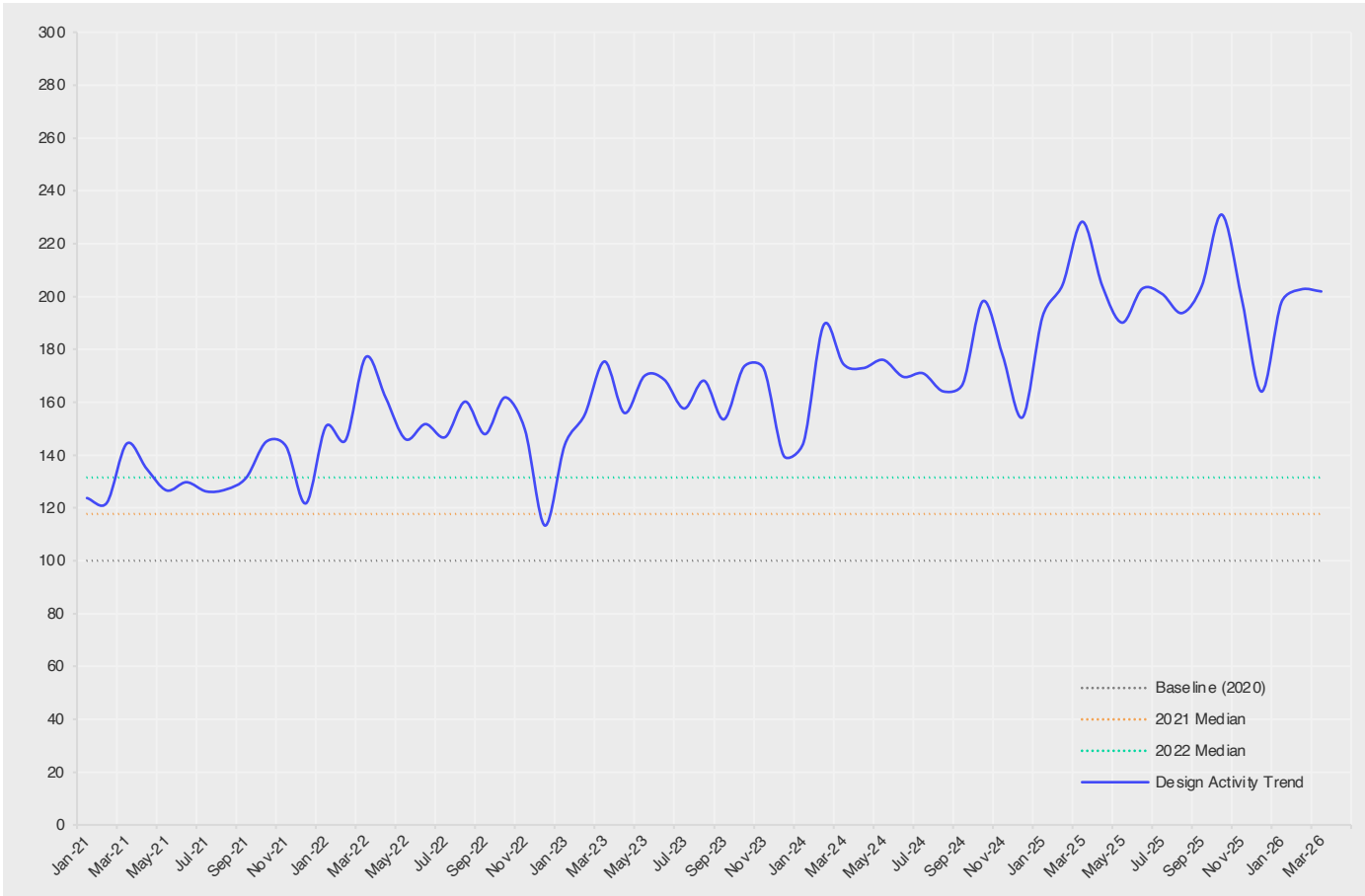
March 2026

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	-4%	-16%	-2%
Interconnects	84.7	4%	-8%	2%
Discrete Semiconductors	53.6	2%	-4%	2%
Power	50.6	2%	-15%	-1%
Integrated Circuits	48.1	-6%	-16%	-1%
Embedded Processors and Controllers	15.7	10%	-27%	-1%
Electromechanicals	15.4	13%	-11%	1%
Optoelectronics	14.1	1%	-19%	-2%
Sensors	7.2	-5%	-9%	-3%
RF and Wireless	4.4	28%	0%	3%
Memory	4.2	-1%	-18%	-1%
Circuit Protection	1.8	25%	6%	6%

Product Class (Top 15) AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	6%	-9%	2%
Power Circuits	67.0	4%	-10%	-1%
Resistors	57.7	-5%	-1%	1%
Capacitors	51.8	-15%	-33%	-7%
Diodes	48.2	2%	1%	2%
Transistors	31.5	2%	-10%	2%
Inductors	24.0	19%	-2%	3%
Microcontrollers and Processors	23.6	10%	-27%	-1%
Terminal Blocks	23.6	-3%	-6%	5%
Optoelectronics	20.9	2%	-17%	-2%
Drivers And Interfaces	20.2	9%	-1%	2%
Amplifier Circuits	16.7	-6%	-9%	-2%
Logic	13.6	-33%	-26%	-4%
Switches	12.1	3%	-12%	0%
Signal Circuits	12.0	13%	-24%	-1%

Design Activity Trend: EMEA

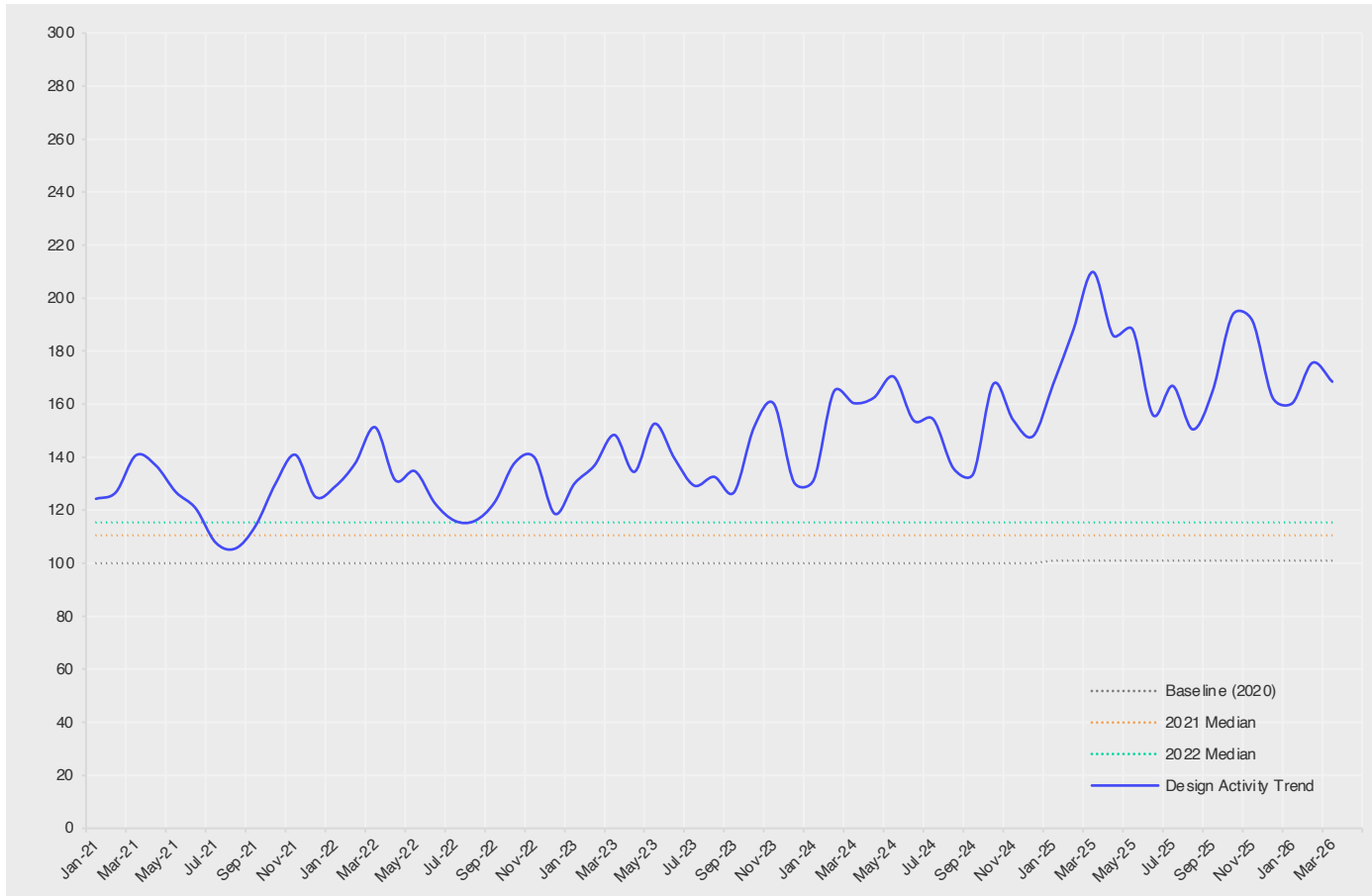
March 2026

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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	-5%	-25%	0%
Interconnects	89.4	-2%	-17%	1%
Discrete Semiconductors	58.6	-3%	-15%	1%
Integrated Circuits	58.5	1%	-19%	0%
Power	55.4	2%	-15%	0%
Embedded Processors and Controllers	18.5	-5%	-29%	-1%
Electromechanicals	16.8	7%	-18%	1%
Optoelectronics	15.5	2%	-22%	1%
Sensors	7.1	-2%	-14%	2%
Memory	4.1	7%	-18%	1%
RF and Wireless	3.9	-6%	-24%	1%
Circuit Protection	2.3	11%	-2%	6%

Product Class (Top 15) EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-2%	-18%	1%
Power Circuits	72.8	2%	-15%	0%
Resistors	49.5	-5%	-15%	2%
Diodes	49.2	-7%	-14%	1%
Capacitors	48.8	-5%	-35%	-3%
Transistors	35.1	5%	-16%	1%
Inductors	28.9	-10%	-19%	2%
Microcontrollers and Processors	27.0	-5%	-29%	-1%
Terminal Blocks	26.9	-4%	-17%	1%
Drivers And Interfaces	22.2	0%	-12%	0%
Optoelectronics	22.1	3%	-21%	2%
Amplifier Circuits	21.2	7%	-13%	2%
Logic	17.2	3%	-22%	-1%
Signal Circuits	13.1	-5%	-24%	-2%
Switches	11.7	3%	-25%	0%

Design Activity Trend: APAC

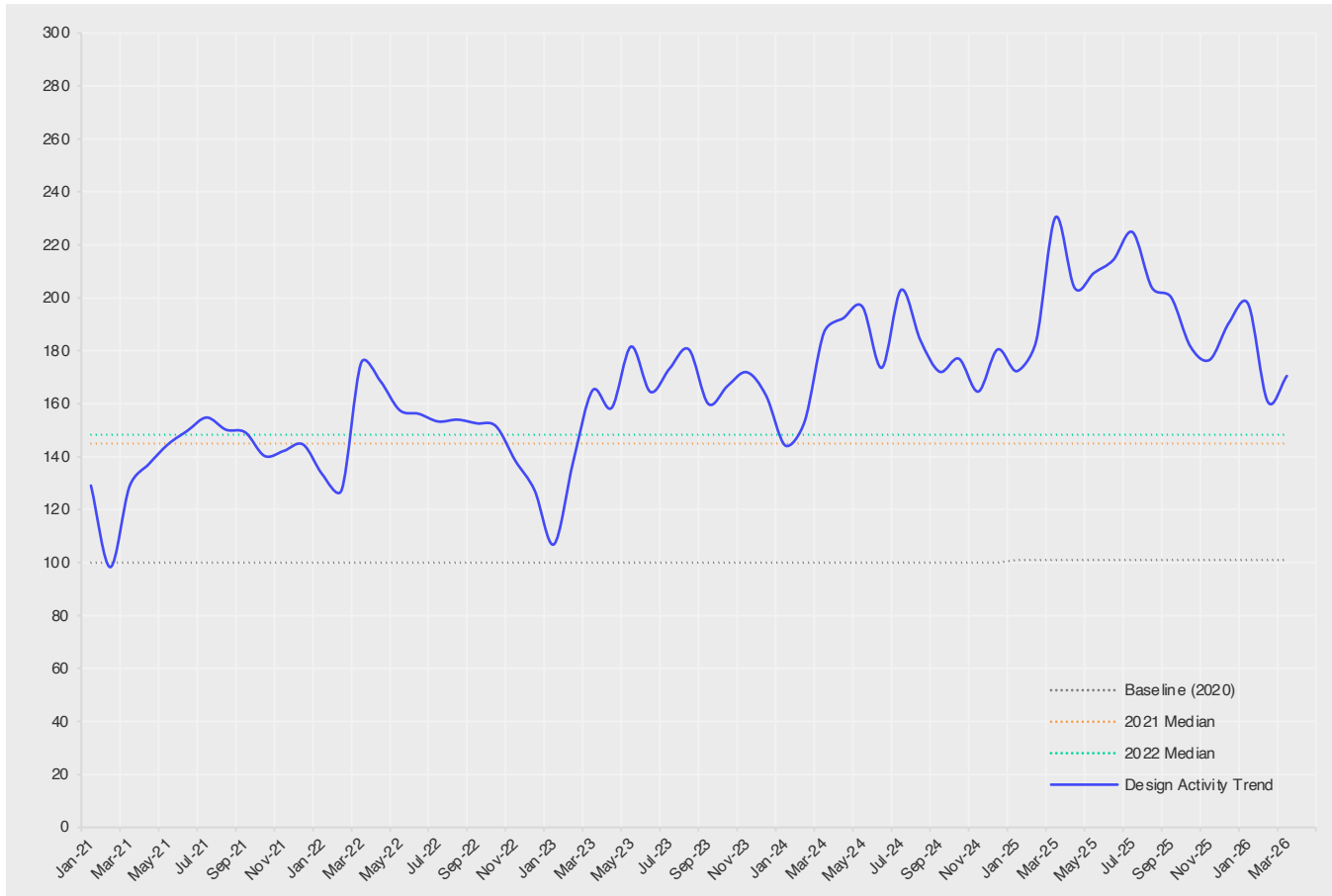
March 2026

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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	6%	-28%	-3%
Interconnects	73.7	4%	-20%	-1%
Discrete Semiconductors	64.5	12%	-19%	-2%
Integrated Circuits	61.1	8%	-32%	-3%
Power	53.8	5%	-32%	-4%
Embedded Processors and Controllers	20.2	13%	-38%	-3%
Optoelectronics	12.9	2%	-30%	-2%
Electromechanicals	12.3	5%	-29%	-3%
Sensors	6.3	24%	-24%	-1%
Memory	4.7	9%	-22%	-3%
RF and Wireless	4.7	21%	-31%	-4%
Circuit Protection	2.0	21%	-14%	1%

Product Class (Top 15) APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	7%	-19%	-2%
Power Circuits	77.3	3%	-32%	-4%
Diodes	60.5	7%	-21%	-2%
Capacitors	59.9	5%	-37%	-6%
Resistors	50.1	2%	-14%	-1%
Transistors	42.0	18%	-17%	-2%
Microcontrollers and Processors	32.5	13%	-38%	-3%
Inductors	29.2	18%	-23%	0%
Drivers And Interfaces	26.2	9%	-31%	-4%
Amplifier Circuits	25.2	14%	-28%	-2%
Optoelectronics	20.2	1%	-30%	-2%
Logic	19.0	7%	-34%	-3%
Terminal Blocks	16.5	-11%	-24%	-1%
Filters	15.5	3%	-26%	-3%
Signal Circuits	13.7	-1%	-34%	-5%

Sourcing Activity Summary

March 2026

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 entered growth territory for the first time since March 2024.

- Global sourcing activities increased +26% month-over-month and +16% year-over-year, aligned to seasonal trends. Global sourcing activities grew beyond the baseline for the first time since March 2024.
- Growth in global sourcing activities were driven by increases in activities from the APAC and Americas regions. The EMEA region observed decreases in sourcing activities.
- In the APAC region, notable increases in activities were observed in China, India, South Korea, Taiwan, Malaysia, Singapore, and Vietnam. Increases in sourcing activities were observed across all product groups; however, the following product groups observe the most notable increases: embedded processors and controllers (+88%); sensors (+83%); power (+76%); rf and wireless (+69%); and integrated circuits (+67%).
- In the EMEA region, notable increases in sourcing activities were observed in Germany and Italy, while France, the United Kingdom, and Israel observe decreases in month-over-month activities. Across the region, sourcing activities increased for the following product groups: passives (+15%); discrete semiconductors (+10%); interconnects (+10%); embedded processors and controllers (+19%); sensors (+21%) and electromechanical (+25%).
- In the Americas region, the following product groups observed the most notable increases in activities: discrete semiconductors (+21%); embedded processors and controllers (+21%); interconnects (+18%); memory (+18%); and sensors (+18%).

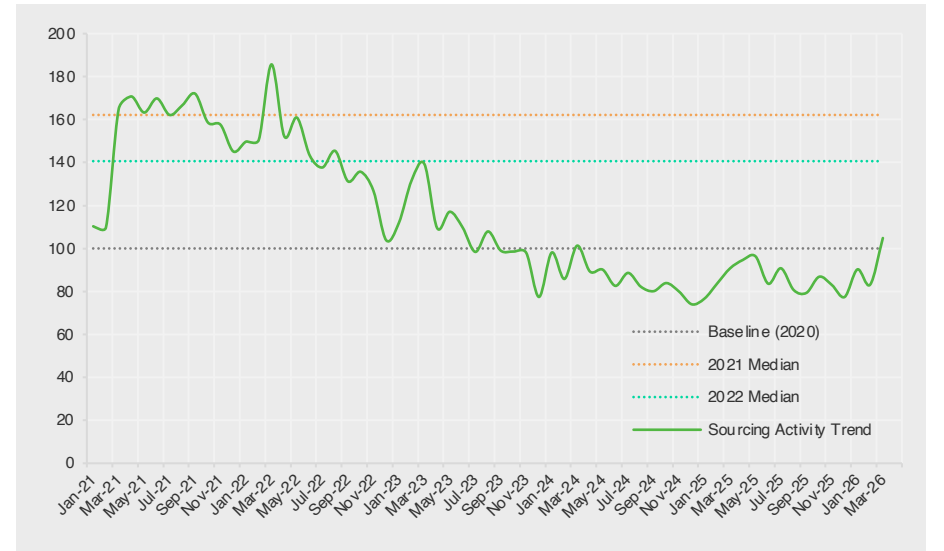
Table 2. Sourcing Activity Summary

		vs. Prior Month	vs. Prior Year	6mo. CMGR
	Global	26.1%	15.6%	4.8%
Region	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
APAC	100.0	59.3%	12.6%	4.5%
AMER	55.5	14.7%	13.3%	4.0%
EMEA	35.3	-11.9%	29.3%	6.8%

Top 10 Countries / Territories

Country / Territory	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
China (incl. Hong Kong)	100.0	98.3%	7.4%	5.1%
United States	84.6	18.3%	7.9%	4.4%
India	31.5	12.7%	8.2%	3.8%
Republic of Korea	20.6	45.5%	-7.4%	2.3%
Germany	16.3	14.4%	0.9%	6.3%
Taiwan	13.5	74.5%	13.9%	5.5%
Malaysia	11.0	46.5%	8.9%	5.1%
Brazil	7.8	-11.1%	84.4%	1.5%
Canada	7.8	5.3%	-12.8%	2.4%
Mexico	7.7	20.0%	36.6%	3.7%

Chart 6. Global Sourcing Activity Trend



Sourcing Activity Trend: Americas

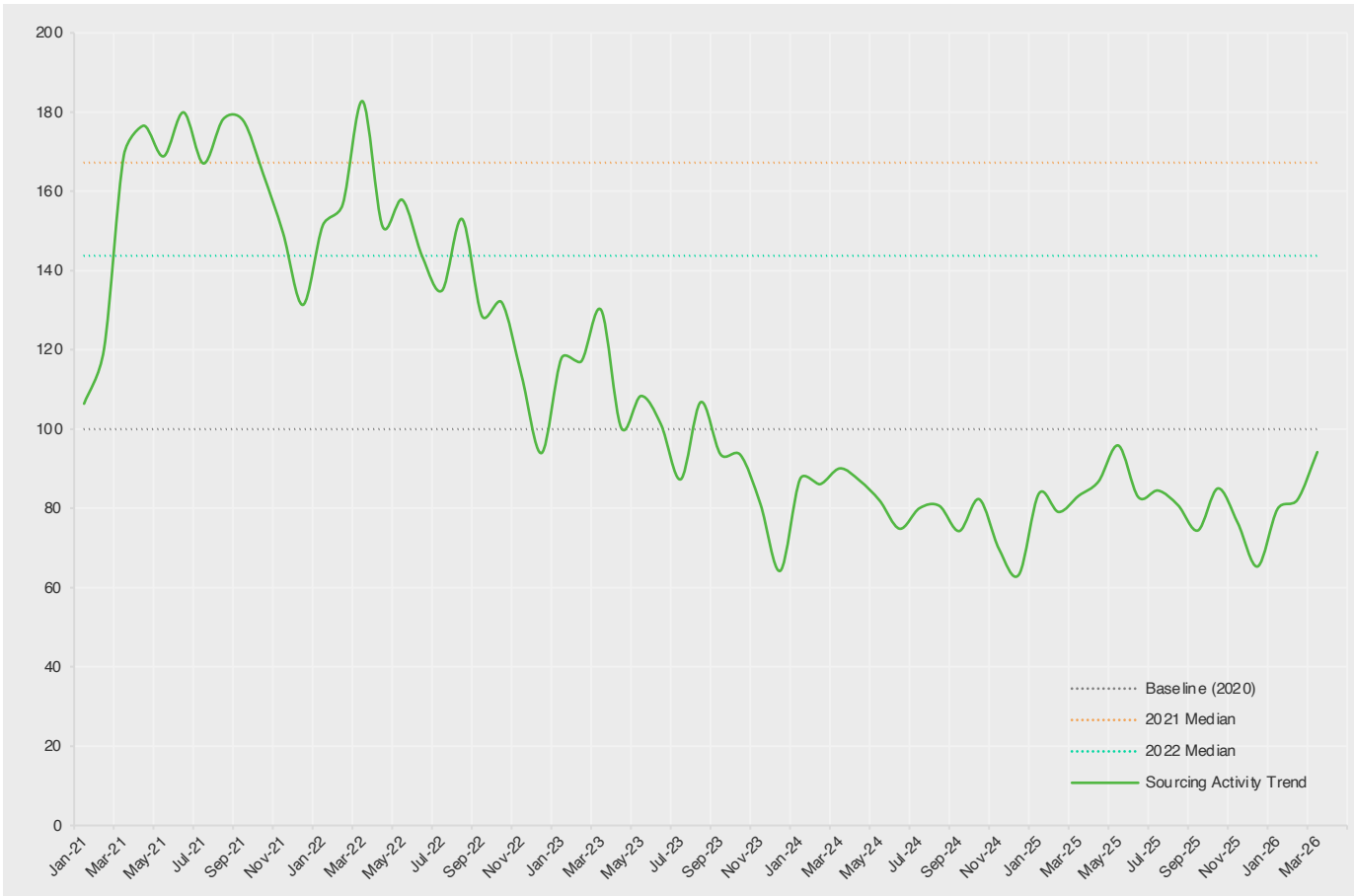
March 2026

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Chart 8. Americas Sourcing Activity Trend



Product Group AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	8%	3%	2%
Interconnects	92.0	18%	5%	3%
Discrete Semiconductors	48.3	21%	37%	8%
Integrated Circuits	36.9	15%	13%	5%
Power	30.0	14%	17%	4%
Embedded Processors and Controllers	12.8	21%	21%	4%
Electromechanicals	11.6	16%	11%	1%
Memory	10.9	18%	107%	15%
Optoelectronics	9.5	11%	-2%	1%
Sensors	4.2	18%	27%	5%
Circuit Protection	3.4	13%	20%	4%
RF and Wireless	3.3	28%	27%	2%

Product Class (Top 15) AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	17%	3%	3%
Capacitors	73.7	8%	0%	3%
Resistors	66.0	5%	1%	2%
Diodes	46.2	17%	41%	8%
Power Circuits	44.9	14%	17%	4%
Connector Support	38.0	22%	12%	4%
Transistors	36.7	27%	37%	7%
Microcontrollers and Processors	22.5	21%	21%	4%
Terminal Blocks	21.6	14%	3%	3%
Memory	19.1	18%	107%	15%
Inductors	18.0	13%	18%	2%
Optoelectronics	16.3	12%	-2%	1%
Logic	15.6	14%	39%	8%
Drivers And Interfaces	14.1	16%	21%	5%
Amplifier Circuits	13.9	8%	-12%	5%

Sourcing Activity Trend: EMEA

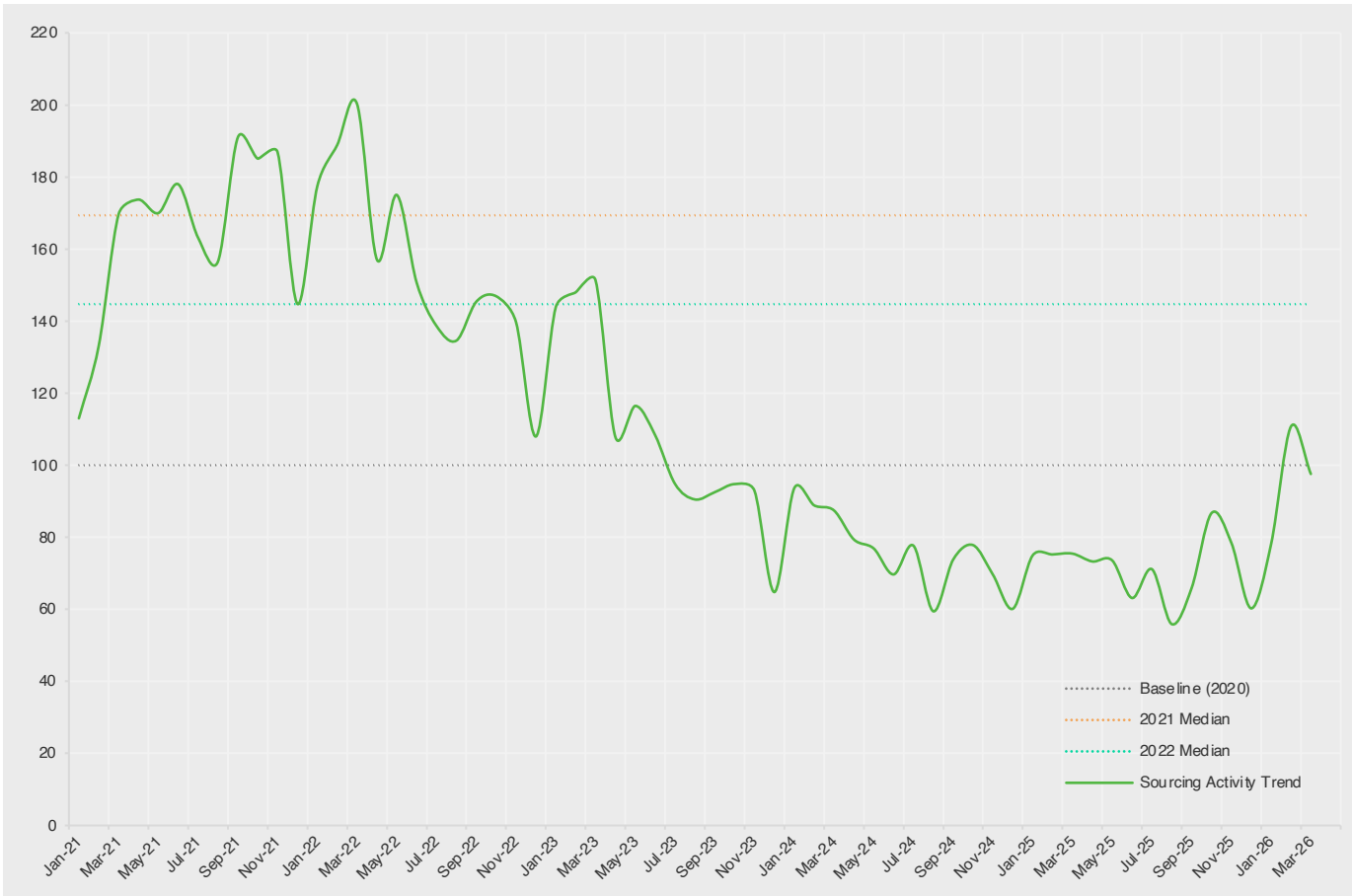
March 2026

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Chart 9. EMEA Sourcing Activity Trend



Product Group EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	15%	9%	4%
Discrete Semiconductors	68.1	10%	66%	11%
Interconnects	67.0	10%	15%	5%
Integrated Circuits	65.2	-59%	68%	11%
Power	36.9	8%	21%	5%
Embedded Processors and Controllers	19.2	19%	23%	5%
Memory	12.6	3%	90%	16%
Electromechanicals	12.1	25%	17%	4%
Optoelectronics	11.7	13%	-1%	4%
Sensors	5.8	21%	34%	7%
Circuit Protection	3.2	10%	1%	4%
RF and Wireless	3.1	13%	7%	3%

Product Class (Top 15) EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	11%	14%	5%
Capacitors	89.3	14%	2%	4%
Diodes	79.0	8%	75%	12%
Resistors	78.2	15%	15%	5%
Power Circuits	68.9	7%	22%	5%
Transistors	67.5	13%	60%	11%
Amplifier Circuits	58.9	-78%	177%	22%
Microcontrollers and Processors	42.0	19%	23%	5%
Connector Support	30.0	12%	25%	5%
Memory	27.5	3%	90%	16%
Inductors	27.0	16%	16%	4%
Drivers And Interfaces	25.3	17%	31%	5%
Optoelectronics	24.6	13%	-2%	4%
Logic	21.2	3%	46%	7%
Signal Circuits	16.3	25%	40%	7%

Sourcing Activity Trend: APAC

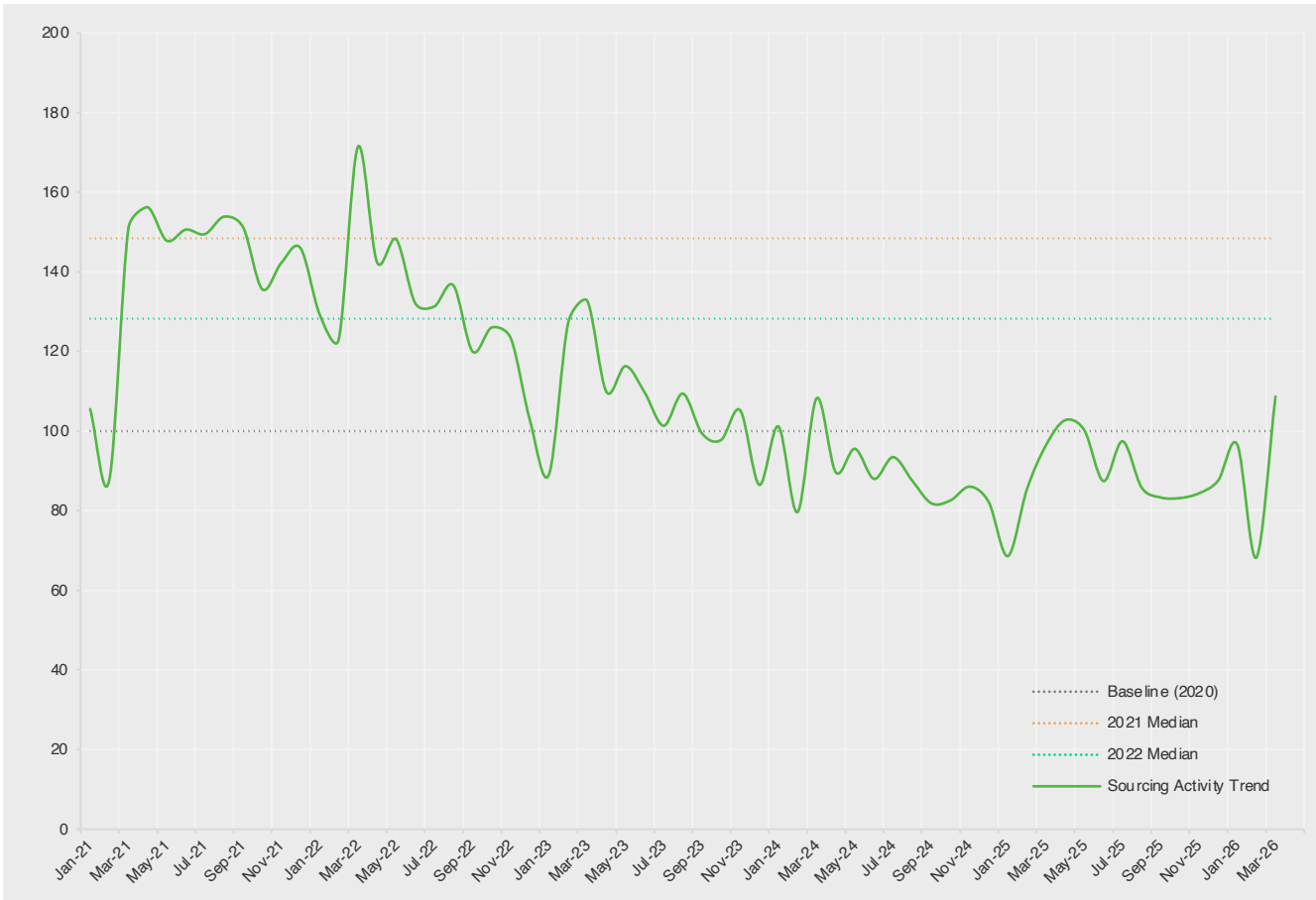
March 2026

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Chart 10. APAC Sourcing Activity Trend



Product Group APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	47%	0%	3%
Interconnects	78.4	55%	5%	2%
Discrete Semiconductors	65.8	63%	50%	10%
Integrated Circuits	55.0	67%	15%	5%
Power	44.7	76%	10%	5%
Embedded Processors and Controllers	23.2	88%	10%	5%
Memory	15.1	51%	75%	12%
Electromechanicals	11.9	54%	-1%	2%
Optoelectronics	10.6	33%	-11%	1%
Sensors	7.0	83%	30%	7%
RF and Wireless	5.8	69%	-4%	2%
Circuit Protection	3.5	46%	-5%	2%

Product Class (Top 15) APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	33%	2%	2%
Capacitors	80.6	47%	-4%	3%
Power Circuits	69.6	78%	14%	5%
Diodes	66.4	57%	56%	10%
Resistors	63.5	44%	8%	4%
Transistors	56.3	72%	48%	10%
Microcontrollers and Processors	43.9	88%	10%	5%
Connector Support	32.3	63%	12%	3%
Memory	28.6	51%	75%	12%
Drivers And Interfaces	22.5	70%	8%	5%
Logic	22.5	58%	56%	9%
Amplifier Circuits	21.4	59%	24%	2%
Inductors	21.4	47%	-5%	2%
Optoelectronics	19.4	33%	-10%	1%
Signal Circuits	15.7	80%	13%	5%

Recap

March 2026

- Global design activities deviated from seasonal trends this March. While historically, we have observed global design activities increase from February to March; this year the overall activity levels remained flat month-over-month. Even so, global design activities continued to remain strong and well above the baseline.
- Global sourcing activities followed seasonal trends and increased month-over-month and grew beyond the baseline for the first time since March 2024.
- Global design and sourcing activities continued to be driven around AI infrastructure, memory, and power electronics. Automotive continued to remain stable.
- For Q2 2026, we anticipate global design activities to increase +3% quarter-over-quarter, and global sourcing activities to remain flat to decrease -4% quarter-over-quarter.

