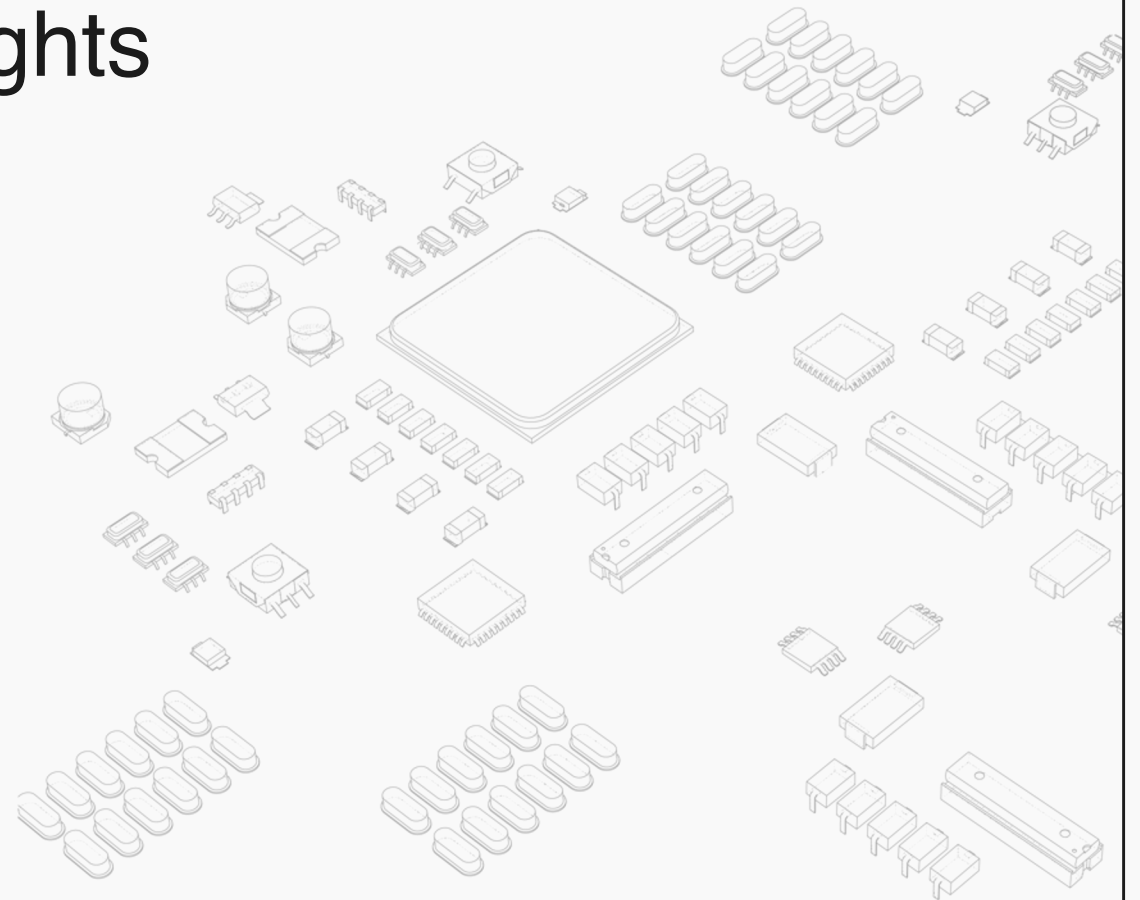




Design-to-Source Monthly Insights

April 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.

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What We Saw Across The Supplyframe Network

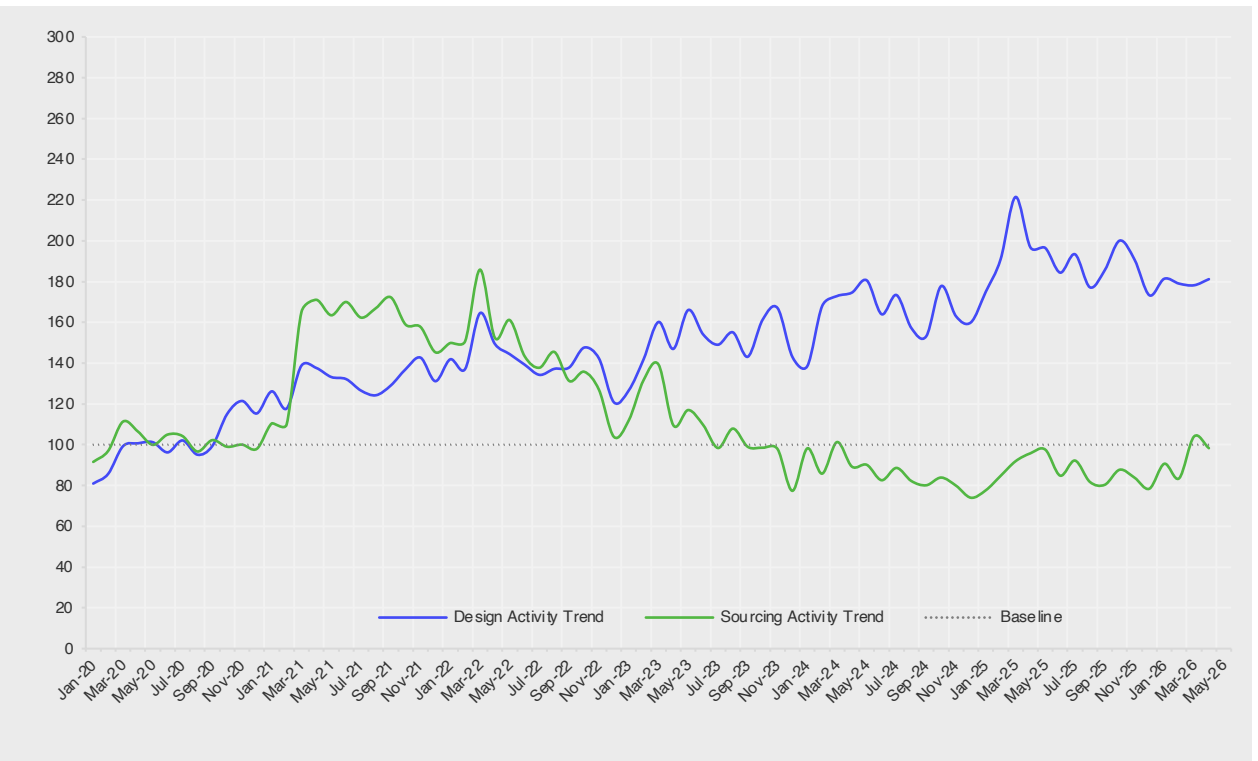
April 2026

- Both global design and sourcing activities outperformed the seasonal average for April, highlighting resilient market conditions.
- Global design activities increased +1.7% month-over-month in April, outperforming the seasonal average decline of -5.7%. The APAC region observed the largest increase in month-over-month design activities.
- Global sourcing activities decreased -5.5% month-over-month in April, but the decline was less severe than the seasonal average of -8.7%. The EMEA region observed strongest year-over-year improvements in sourcing activities.
- April design and sourcing activities continued to be shaped by growing demand in AI infrastructure, memory and high-performance compute, and automotive (electrification and power). This demand is expected to continue through the remainder of 2026.
- Q2 2026 projections remain unchanged from March. Global design activities are expected to observe a modest growth of +3% quarter-over-quarter, while global sourcing activities are expected to remain flat to decrease -4% quarter-over-quarter.

Global Performance

DESIGN ACTIVITES	+1.7% M/M	SOURCING ACTIVITES	-5.5% M/M
	-7.9% Y/Y		+2.6% 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

April 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 remained elevated thanks to strong growth in activities in APAC.

- Global design activities increased +1.7% month-over-month, outperforming the seasonal average for the month. Compared to same period last year, global design activities decreased -8% year-over-year but remained well above the baseline.
- In the APAC region, the following countries observed the most notable increases in design activities: China (+17%); South Korea (+23%); Japan (+26%); and Vietnam (+10%). In these countries, the following product groups observed the largest increases in activities: Optoelectronics (+32%); discrete semiconductors (+24%); interconnects (+23%); ICs (+22%); and power components (+21%). Memory demand increased by +10% month-over-month.
- In the Americas region, the United States remained flat month-over-month in design activities, while Canada, Brazil, and Mexico all observe month-over-month decreases in activities. In these countries, the following product groups continued to observe increases in design activities: power components (+2%); embedded processors and controllers (+5%); memory (+8%); and optoelectronics (+3%).
- In the EMEA region, the following countries observed increases in design activities: Germany (+5%); France (+13%); and Italy (+2%). In these countries, the following product groups continued to observe increases in design activities: embedded processors and controllers (+19%); sensors (+9%); ICs (+7%); interconnects (+6%); discrete semiconductors (+5%); power components (+4%); and passives (+4%).

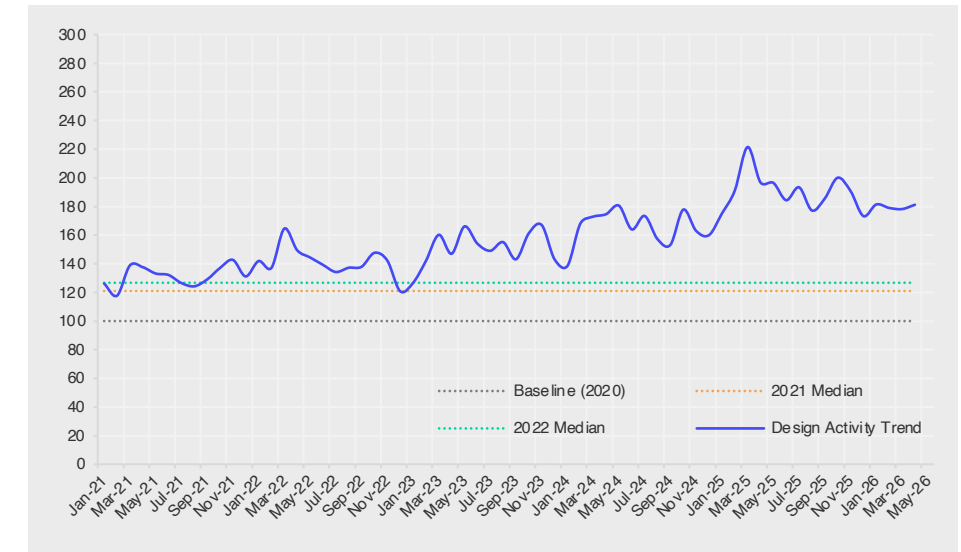
Table 1. Design Activity Summary

		vs. Prior Month	vs. Prior Year	6mo. CMGR
Global		1.7%	-7.9%	-1.6%
Region	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
EMEA	100.0	-0.4%	-9.5%	-2.4%
APAC	67.6	10.7%	-6.7%	0.7%
AMER	46.1	-5.3%	-6.1%	-3.1%

Top 10 Countries / Territories

Country / Territory	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	0.0%	-1.8%	-2.9%
India	57.6	0.8%	9.2%	0.7%
Germany	47.9	4.6%	-9.4%	-0.9%
China (incl. Hong Kong)	40.6	16.7%	-32.5%	-0.7%
Republic of Korea	30.6	22.5%	17.6%	6.4%
Italy	26.5	1.5%	17.0%	-1.1%
France	23.8	13.1%	0.7%	0.4%
United Kingdom	23.4	-12.7%	-8.3%	-3.5%
Spain	18.9	-0.3%	2.0%	1.1%
Japan	18.5	25.9%	10.0%	-0.4%

Chart 2. Global Design Activity Trend



Design Activity Trend: Americas

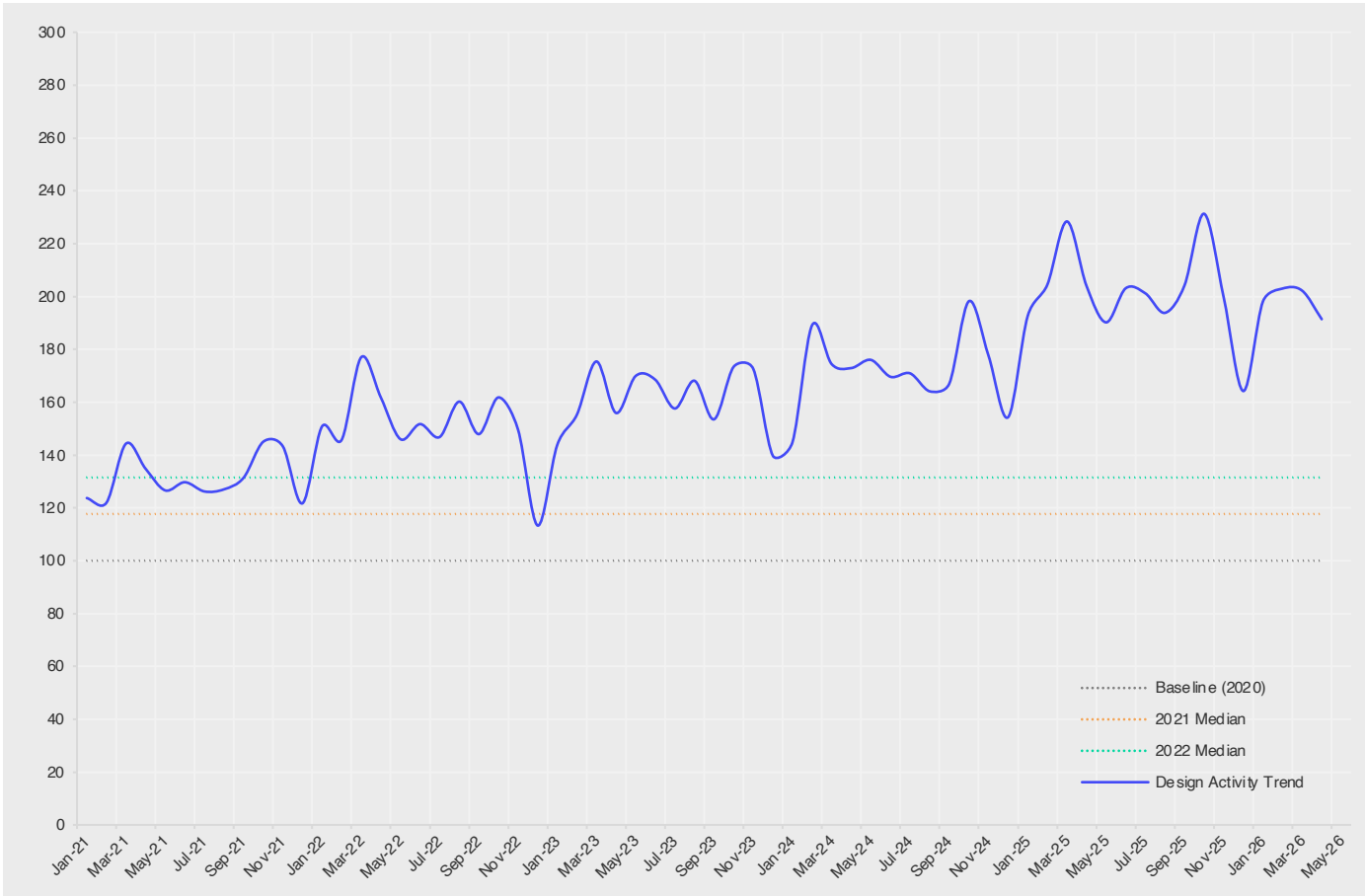
April 2026

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	-3%	-4%	-4%
Interconnects	77.4	-12%	-11%	-3%
Power	52.0	0%	3%	-3%
Discrete Semiconductors	49.2	-11%	-15%	-3%
Integrated Circuits	47.8	-4%	-8%	-3%
Embedded Processors and Controllers	16.6	2%	-6%	-2%
Optoelectronics	14.9	3%	-8%	-3%
Electromechanicals	12.7	-20%	-21%	-4%
Sensors	7.4	-1%	-3%	-3%
Memory	4.6	7%	12%	-2%
RF and Wireless	3.9	-13%	-11%	-2%
Circuit Protection	2.0	7%	8%	1%

Product Class (Top 15) AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-9%	-9%	-3%
Power Circuits	71.1	-4%	1%	-3%
Resistors	60.2	-5%	-12%	-5%
Capacitors	57.7	1%	1%	-4%
Diodes	45.9	-14%	-13%	-3%
Transistors	32.1	-8%	-18%	-3%
Microcontrollers and Processors	26.6	2%	-6%	-2%
Inductors	26.2	-1%	11%	-4%
Optoelectronics	22.9	0%	-9%	-4%
Terminal Blocks	20.5	-21%	-21%	-2%
Drivers And Interfaces	20.4	-8%	-2%	-1%
Amplifier Circuits	18.8	2%	-9%	-4%
Logic	15.9	6%	4%	-3%
Converters	12.3	25%	21%	-1%
Sensors/Transducers	11.9	-1%	-3%	-3%

Design Activity Trend: EMEA

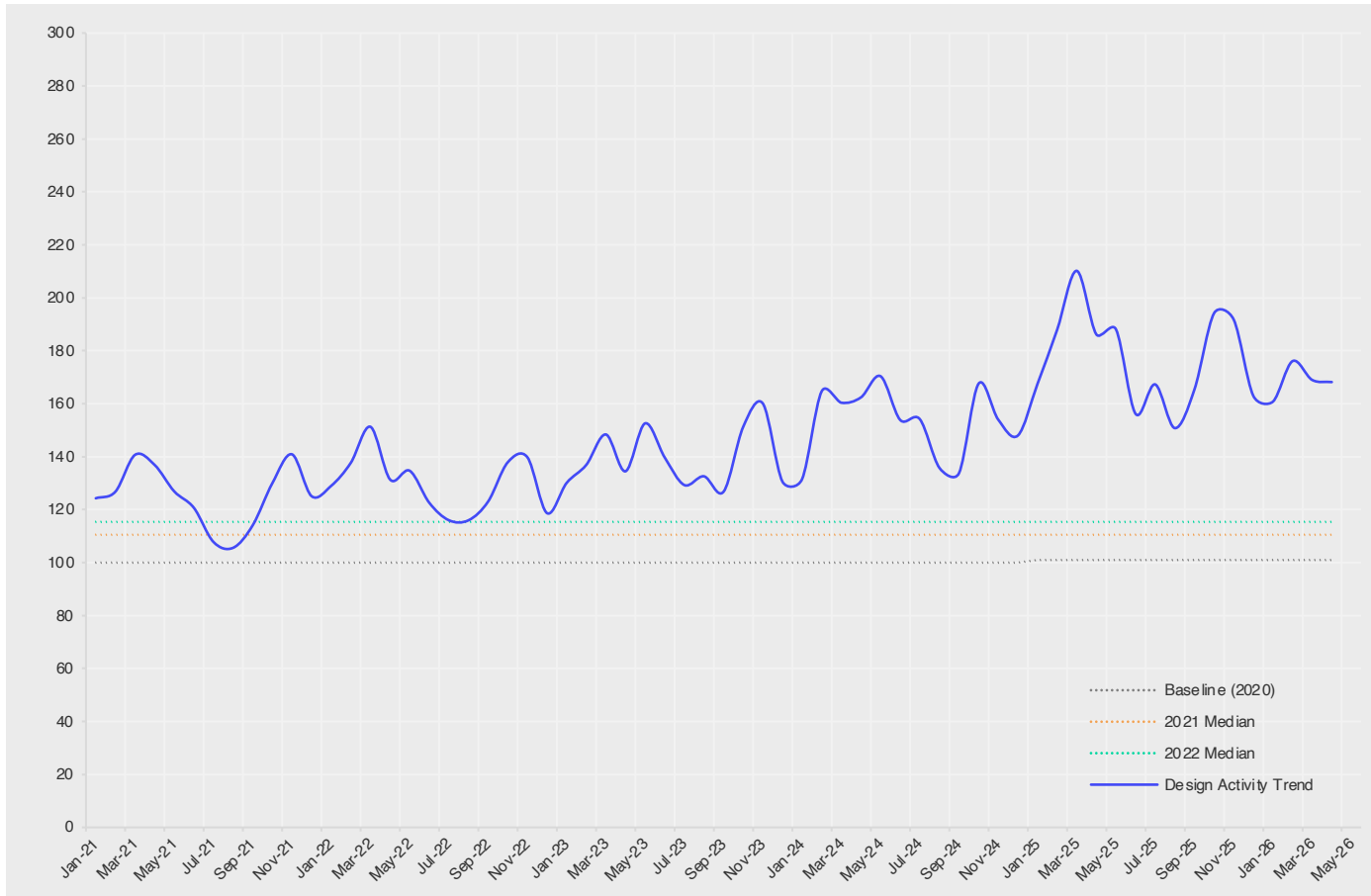
April 2026

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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	-2%	-14%	-3%
Interconnects	92.4	1%	-7%	-1%
Discrete Semiconductors	59.4	-1%	-10%	-2%
Integrated Circuits	57.9	-3%	-9%	-2%
Power	55.2	-3%	-12%	-3%
Embedded Processors and Controllers	20.4	8%	-14%	-3%
Electromechanicals	16.0	-7%	-10%	-1%
Optoelectronics	15.7	-1%	-9%	-3%
Sensors	6.8	-8%	-7%	-4%
Memory	4.3	4%	-15%	-6%
RF and Wireless	3.9	-4%	-21%	-4%
Circuit Protection	2.1	-8%	17%	-2%

Product Class (Top 15) EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	0%	-8%	-2%
Power Circuits	69.9	-4%	-13%	-3%
Diodes	47.9	-3%	-12%	-2%
Capacitors	47.6	-2%	-11%	-4%
Resistors	45.7	-8%	-19%	-4%
Transistors	35.6	1%	-6%	0%
Inductors	29.9	4%	-10%	-2%
Microcontrollers and Processors	29.0	8%	-14%	-3%
Terminal Blocks	28.1	5%	-6%	0%
Drivers And Interfaces	22.4	1%	-6%	-1%
Optoelectronics	21.6	-2%	-10%	-4%
Amplifier Circuits	19.0	-10%	-5%	-4%
Logic	17.6	3%	-5%	-2%
Filters	12.3	5%	-13%	-3%
Signal Circuits	11.9	-9%	-17%	-3%

Design Activity Trend: APAC

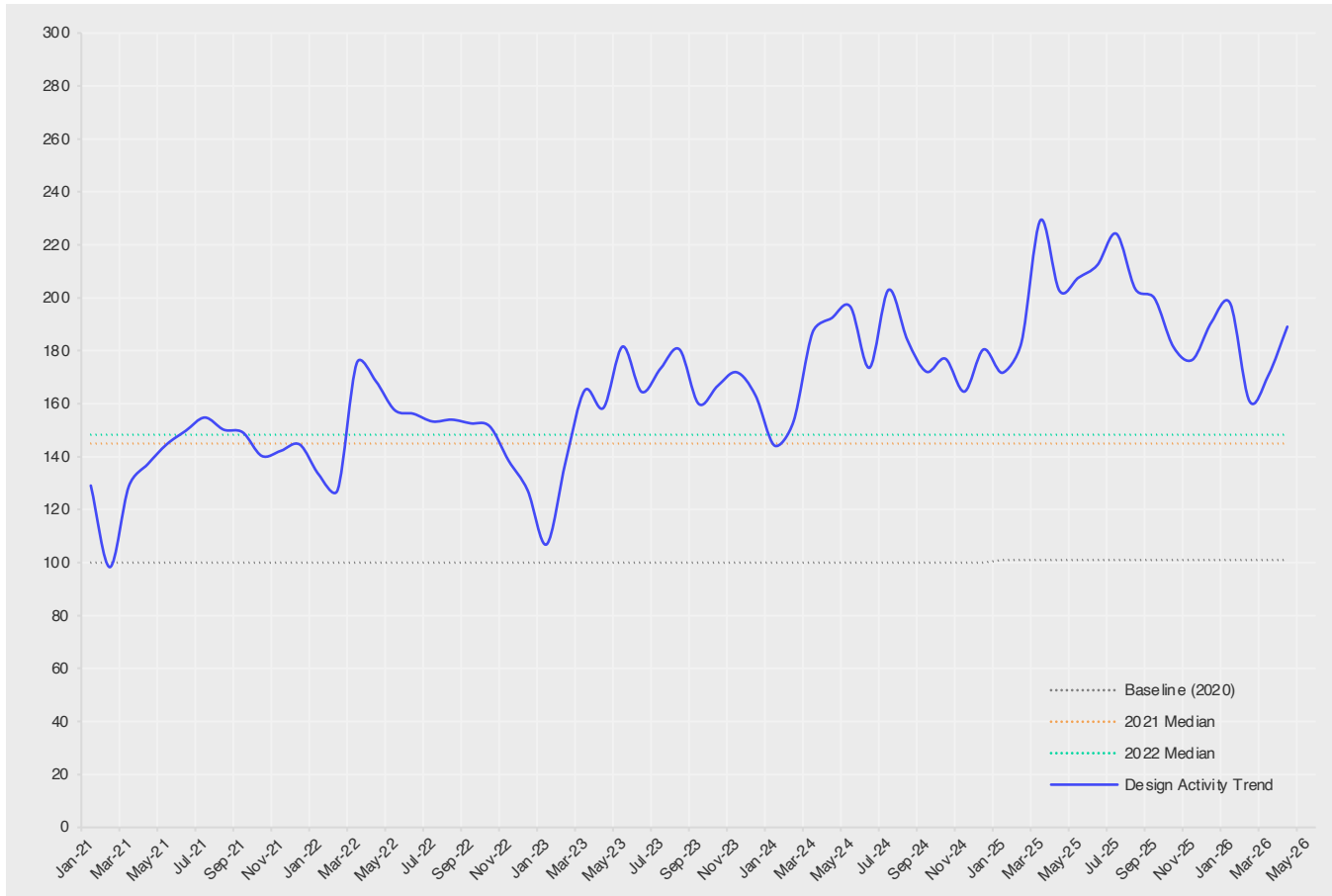
April 2026

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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	10%	-3%	1%
Interconnects	75.2	12%	-3%	1%
Discrete Semiconductors	65.0	11%	-4%	1%
Integrated Circuits	61.7	11%	-11%	0%
Power	57.4	18%	-8%	1%
Embedded Processors and Controllers	19.5	7%	-28%	-1%
Optoelectronics	13.6	16%	-12%	1%
Electromechanicals	11.2	0%	-3%	0%
Sensors	5.4	-5%	-21%	-2%
RF and Wireless	5.2	22%	-8%	2%
Memory	4.5	6%	-24%	-3%
Circuit Protection	2.2	26%	56%	4%

Product Class (Top 15) APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	13%	-3%	2%
Power Circuits	80.8	18%	-7%	1%
Diodes	60.3	13%	-5%	1%
Capacitors	56.0	6%	-1%	1%
Resistors	48.5	10%	-9%	0%
Transistors	40.6	9%	-3%	1%
Microcontrollers and Processors	30.6	7%	-28%	-1%
Inductors	27.9	8%	4%	2%
Drivers And Interfaces	25.5	10%	-7%	0%
Amplifier Circuits	24.2	9%	-6%	0%
Optoelectronics	20.6	15%	-13%	1%
Logic	19.4	15%	-13%	1%
Filters	16.9	24%	-4%	1%
Terminal Blocks	15.5	6%	-7%	0%
Signal Circuits	13.7	13%	-14%	-1%

Sourcing Activity Summary

April 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 continued to show signs of recovery versus prior year.

- Global sourcing activities decreased -5.5% month-over-month in April but performed better than the seasonal average decline of -8.7%. Compared to prior year, global sourcing activities increased +3% year-over-year, supported primarily by stronger demand trends in the EMEA regions.
- In EMEA, overall sourcing activities softened month-over-month; however, several countries observed notable month-over-month increases: Israel (+49%); Poland (+16%); Spain (+5%); and Belgium (+33%). Month-over-month sourcing activity increases in these countries were concentrated around amplifier circuits, logic devices, drivers and interfaces, and filters. Other product categories like power circuits, diodes, transistors, microcontrollers and processors, and memory components continued to show sustained year-over-year sourcing growth, but experienced moderate month-over-month decline in activities.
- In the Americas, sourcing activities decreased -5% month-over-month in the United States, while Canada increased +4% for the same period. Mexico and Brazil both observed month-over-month declines but continued to trend above prior year levels. Product groups with the strongest year-over-year sourcing growth included discrete semiconductors (+16%), memory (+48%), RF and wireless (+10%), sensors (+9%), and power components (+4%). The continued increase in memory and discrete semiconductor sourcing activity likely reflects ongoing AI infrastructure deployments, datacenter expansion, automotive electronics demand, and industrial power system investments across the region.

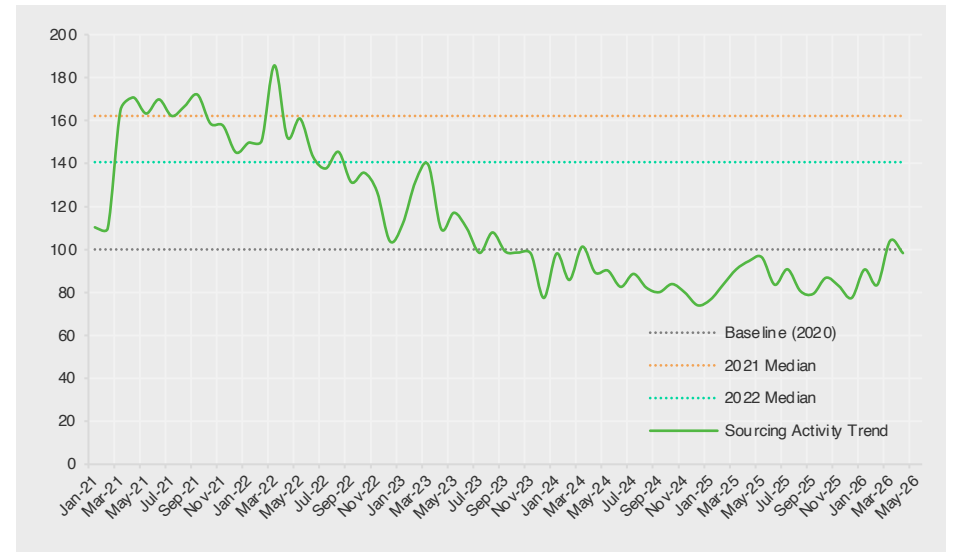
Table 2. Sourcing Activity Summary

		vs. Prior Month	vs. Prior Year	6mo. CMGR
Global		-5.5%	2.6%	1.9%
Region	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
APAC	100.0	-7.0%	-3.6%	3.0%
AMER	56.2	-5.9%	0.2%	0.4%
EMEA	37.7	-0.6%	9.7%	1.6%

Top 10 Countries / Territories

Country / Territory	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
China (incl. Hong Kong)	100.0	-5.1%	-2.9%	4.3%
United States	84.2	-5.5%	-4.1%	1.4%
India	28.8	-13.4%	-2.1%	2.1%
Republic of Korea	20.9	-4.1%	-15.9%	4.2%
Germany	15.0	-12.6%	18.3%	-2.8%
Malaysia	11.7	0.9%	11.3%	1.7%
Taiwan	11.1	-21.6%	-9.9%	-1.5%
Canada	8.5	3.9%	-1.7%	2.2%
Israel	8.4	49.1%	71.5%	3.7%
Singapore	7.9	-0.7%	-16.0%	1.0%

Chart 6. Global Sourcing Activity Trend



Sourcing Activity Trend: Americas

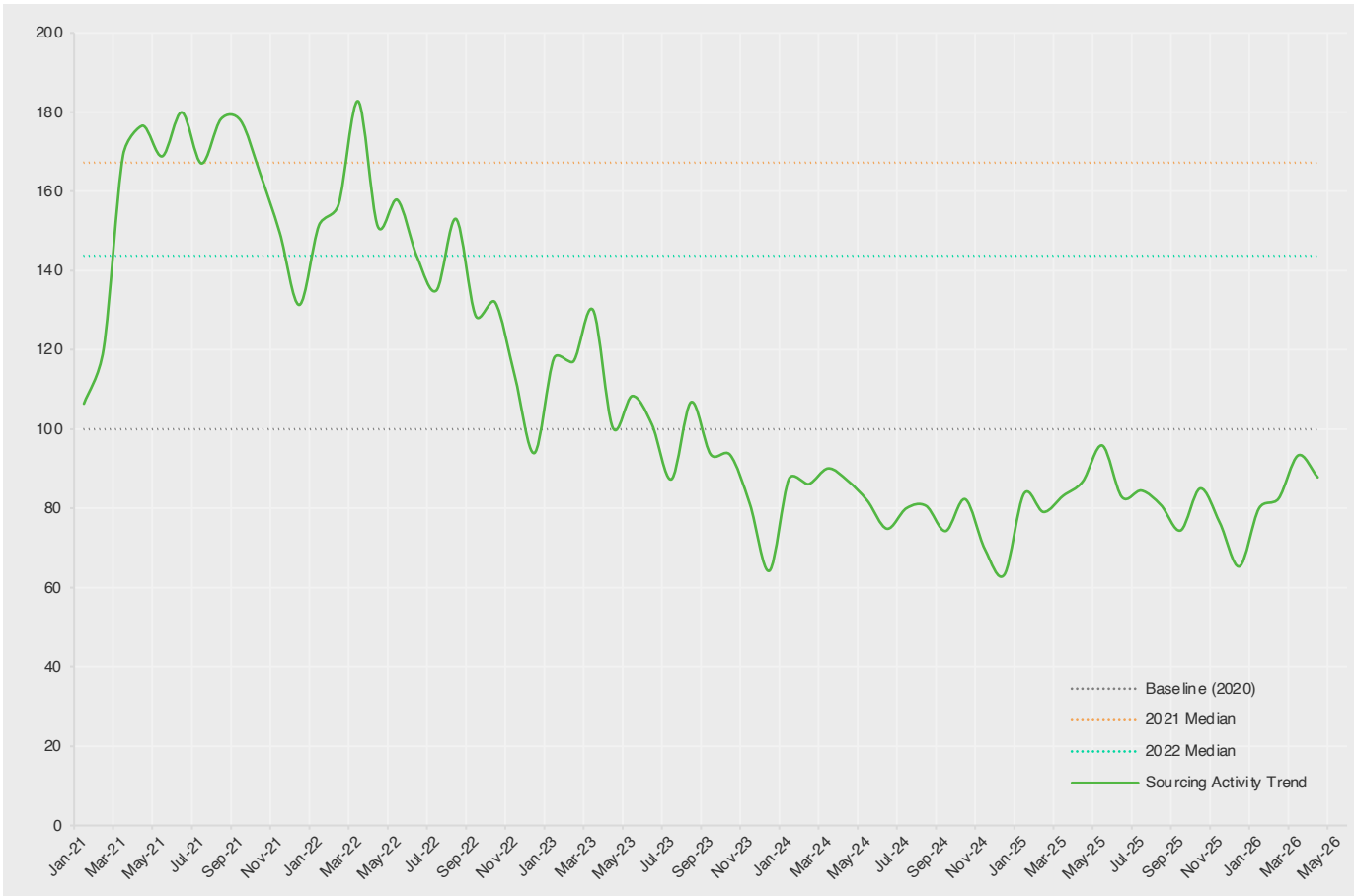
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Chart 8. Americas Sourcing Activity Trend



Product Group AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-5%	-5%	0%
Interconnects	88.5	-8%	-4%	1%
Discrete Semiconductors	46.8	-7%	16%	-2%
Integrated Circuits	37.8	-2%	0%	1%
Power	30.6	-3%	4%	2%
Embedded Processors and Controllers	12.7	-6%	3%	1%
Electromechanicals	11.5	-5%	-6%	0%
Memory	10.1	-11%	48%	9%
Optoelectronics	9.7	-3%	-13%	-1%
Sensors	4.1	-8%	9%	2%
RF and Wireless	3.3	-4%	10%	2%
Circuit Protection	3.1	-14%	-2%	1%

Product Class (Top 15) AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-8%	-6%	0%
Capacitors	77.4	-3%	-7%	0%
Resistors	67.3	-6%	-8%	0%
Power Circuits	47.8	-2%	5%	2%
Diodes	47.0	-7%	22%	-2%
Connector Support	38.1	-8%	-1%	1%
Transistors	36.7	-8%	13%	-2%
Microcontrollers and Processors	23.1	-6%	3%	1%
Terminal Blocks	21.0	-11%	-1%	1%
Inductors	19.4	-1%	12%	1%
Memory	18.4	-11%	48%	9%
Logic	17.1	1%	24%	-1%
Optoelectronics	17.1	-4%	-14%	-1%
Amplifier Circuits	16.1	6%	-17%	3%
Drivers And Interfaces	13.9	-9%	2%	1%

Sourcing Activity Trend: EMEA

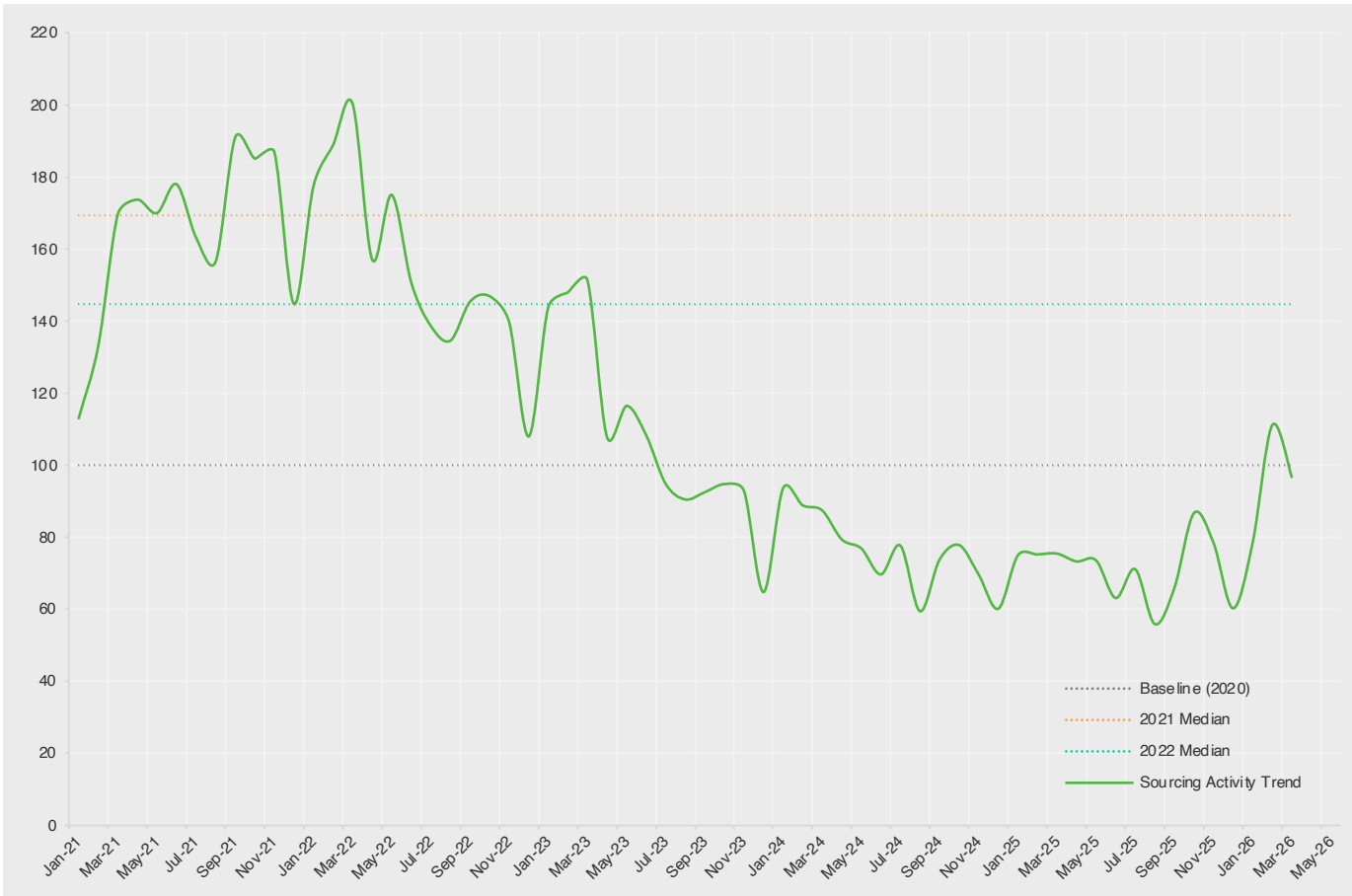
April 2026

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Chart 9. EMEA Sourcing Activity Trend



Product Group EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Integrated Circuits	100.0	46%	133%	12%
Passives	95.6	-9%	6%	1%
Discrete Semiconductors	65.2	-9%	59%	-7%
Interconnects	62.6	-11%	5%	1%
Power	35.4	-8%	8%	2%
Embedded Processors and Controllers	18.0	-10%	6%	2%
Electromechanicals	11.6	-9%	2%	2%
Memory	11.4	-13%	68%	8%
Optoelectronics	10.7	-12%	-12%	0%
Sensors	5.3	-12%	13%	3%
RF and Wireless	3.1	-3%	0%	1%
Circuit Protection	3.0	-10%	-6%	2%

Product Class (Top 15) EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Amplifier Circuits	100.0	123%	415%	35%
Connectors	67.0	-12%	3%	1%
Capacitors	64.0	-6%	5%	1%
Diodes	54.4	-10%	67%	-7%
Resistors	52.6	-12%	4%	1%
Power Circuits	49.2	-6%	10%	2%
Transistors	47.7	-7%	57%	-6%
Microcontrollers and Processors	28.7	-10%	6%	2%
Connector Support	21.3	-7%	12%	3%
Inductors	18.7	-9%	13%	1%
Memory	18.2	-13%	68%	8%
Drivers And Interfaces	18.0	-7%	20%	3%
Logic	16.6	3%	53%	-7%
Optoelectronics	16.5	-12%	-12%	1%
Filters	10.6	-6%	3%	2%

Sourcing Activity Trend: APAC

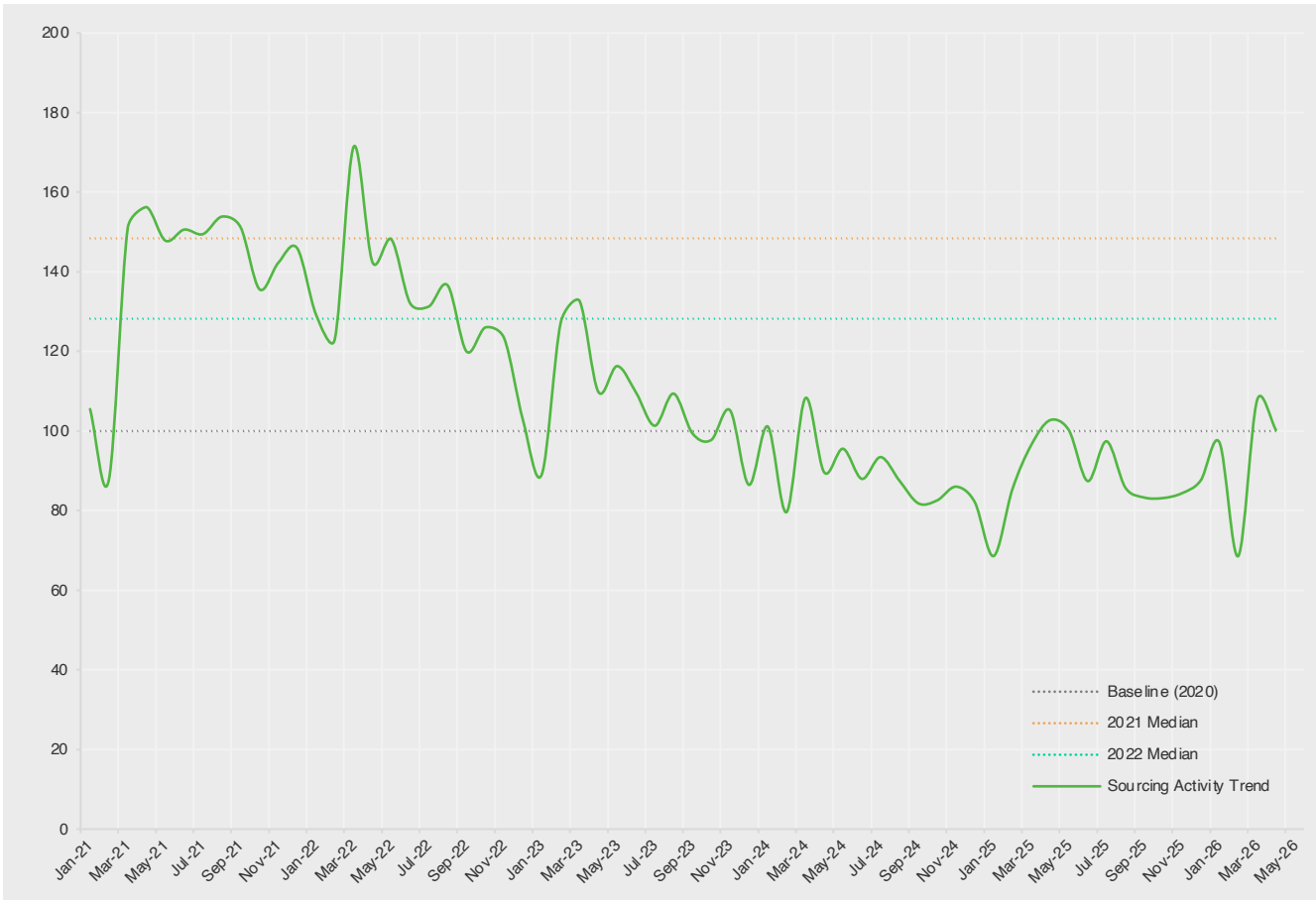
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Chart 10. APAC Sourcing Activity Trend



Product Group APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-7%	-11%	4%
Interconnects	81.7	-3%	-11%	4%
Discrete Semiconductors	67.0	-6%	29%	-2%
Integrated Circuits	56.0	-6%	4%	2%
Power	43.5	-10%	-11%	5%
Embedded Processors and Controllers	21.6	-14%	-10%	5%
Memory	14.3	-12%	33%	10%
Electromechanicals	11.7	-9%	-15%	3%
Optoelectronics	11.2	-2%	-16%	4%
Sensors	6.3	-16%	3%	4%
RF and Wireless	5.4	-15%	-28%	2%
Circuit Protection	3.5	-6%	-12%	3%

Product Class (Top 15) APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-3%	-11%	4%
Capacitors	77.7	-7%	-13%	4%
Diodes	64.7	-6%	31%	-2%
Power Circuits	64.6	-10%	-9%	5%
Resistors	60.0	-9%	-6%	4%
Transistors	54.8	-6%	28%	-1%
Microcontrollers and Processors	39.2	-14%	-10%	5%
Connector Support	32.0	-4%	-13%	5%
Memory	26.0	-12%	33%	10%
Amplifier Circuits	23.4	6%	23%	5%
Drivers And Interfaces	21.9	-6%	-2%	5%
Inductors	21.8	-1%	-6%	5%
Logic	21.0	-10%	22%	-5%
Optoelectronics	19.7	-2%	-16%	4%
Terminal Blocks	15.3	-1%	-7%	6%

Recap

April 2026

- Both global design and sourcing activities outperformed the seasonal average for April, highlighting resilient market conditions.
- APAC region was the primary driver of global design activity growth in April, supported by continued AI infrastructure expansion, memory subsystem development, and automotive electronics demand.
- Global sourcing activities continued improving versus prior year in April. The strongest sourcing demand was concentrated in embedded processors, memory, sensors, RF and wireless, interconnects, and power semiconductors.
- Looking ahead to Q2 2026, design activities are expected to increase modestly. Sourcing activities are expected to stabilize following strong Q1 procurement trends and continued inventory normalization across portions of the semiconductor supply chain.

