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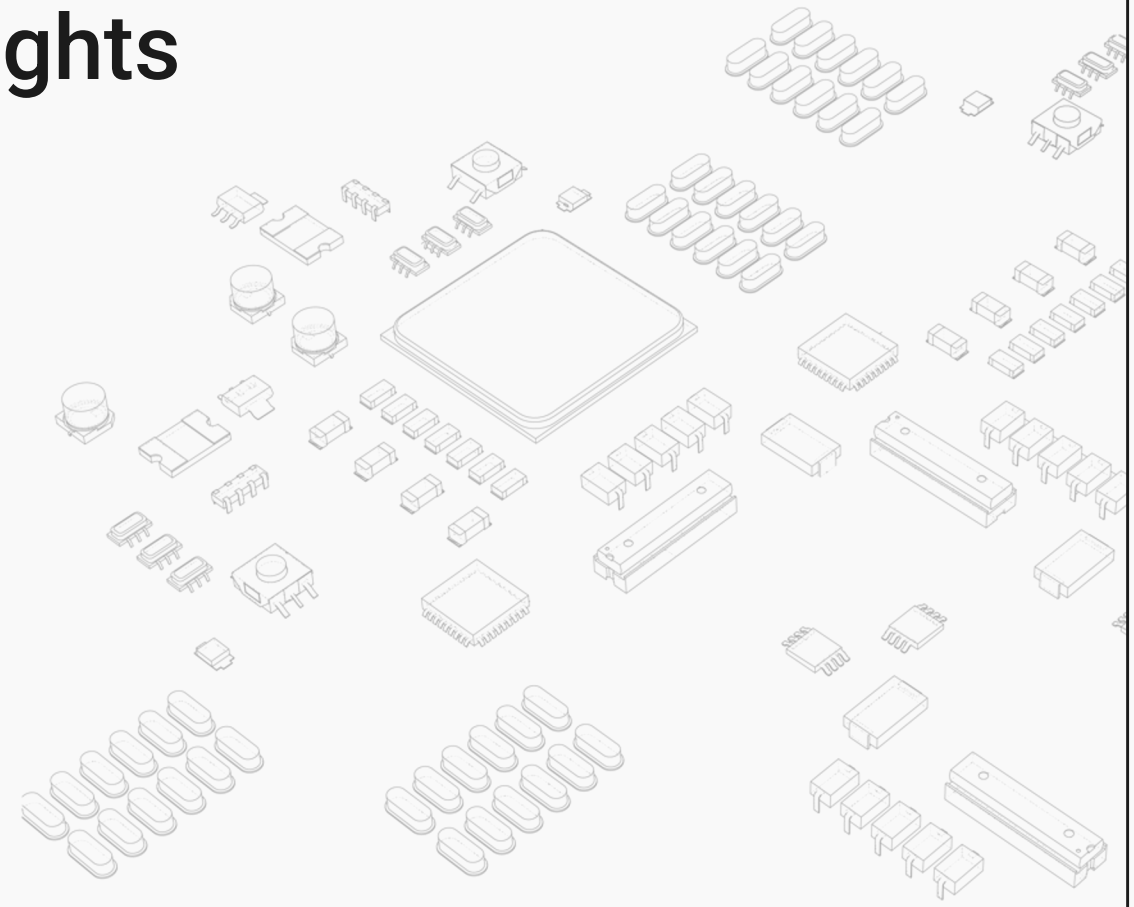
Design-to-Source Monthly Insights

September 2026



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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

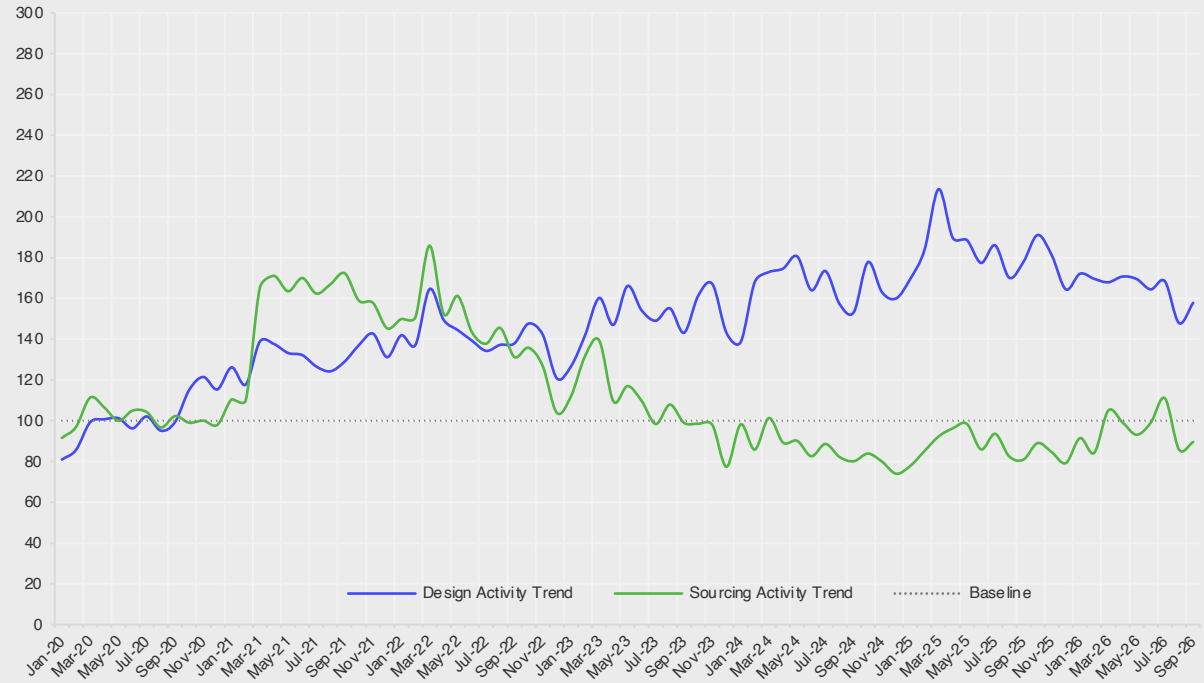
September 2026

- **Global design and sourcing activities increased in September.** Increases were driven by activities in the EMEA region. Global design activities increased +7% MoM but remained -11% below prior year. Global sourcing activities increased +4% MoM and +11% YoY.
- **Q3 ended below Q2, with stronger sourcing activity than last year.** Design activities declined -6% QoQ and -11% YoY; sourcing activities declined -2% QoQ but increased +12% YoY. Design activities trended as forecasted for the quarter. Souring activities trended below the earlier flat-to-positive outlook.
- **EMEA led the September trends for design and sourcing activities.** Regional design activities increased +17% MoM, while sourcing activities increased +35% for the same period. Increases in month-over-month activities were consistent with activities resuming after summer holidays in the region.
- **Embedded processing, RF and wireless, and memory led month-over-month increases in design activities.** Embedded processors and controllers increased +20% MoM; RF and Wireless +21%; and memory +18%.
- **Sourcing activities increased across several categories amid ongoing supply challenges.** Passives, discrete semiconductors, integrated circuits, embedded processors and controllers, and memory all recorded year-over-year increases. Longer lead times and limited availability in some categories may be prompting buyers to explore additional purchasing options to secure components they need.

Global Performance

DESIGN ACTIVITES	+6.7% M/M -11.3% Y/Y
SOURCING ACTIVITES	+4.3% M/M +10.7% 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 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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Global design activities increased month-over-month in September but remained below prior year.

- Global design activities increased +7% MoM but remained -11% below September 2025. Increases in activities were observed in the EMEA region, while APAC and Americas remained flat from August 2026.
- **Italy, Spain, and France led EMEA's month-over-month increases.** Italy increased +61%, Spain +53%, France +28% and Germany +8%. Top product categories in these countries included: connectors (+26%); power circuits (+35%); capacitors (+36%); and microcontroller and processors (+24%).
- **APAC design activity trends varied by country and declined slightly overall.** Regional design activities fell -1% MoM and -15% YoY. China (including Hong Kong) observed +14% increase in MoM design activities but remained -25% below last year. Other countries that observed notable month-over-month increases in design activities included Vietnam (+11%) and Singapore (+12%). South Korea, Japan, and Taiwan. India remained flat.
- **Embedded processors and controllers observed increases in design activities across all regions.** Activities increased +30% in the Americas, +21% in EMEA, and +13% in APAC. Continued development of embedded controls and edge intelligence applications were the likely reasons for the ongoing increase in design activities.
- **Passives and interconnects showed broader weakness compared to last year.** Deign activities for passives components decreased -17% YoY, while capacitors and resistors were approximately -22% below last year.

Table 1. Design Activity Summary

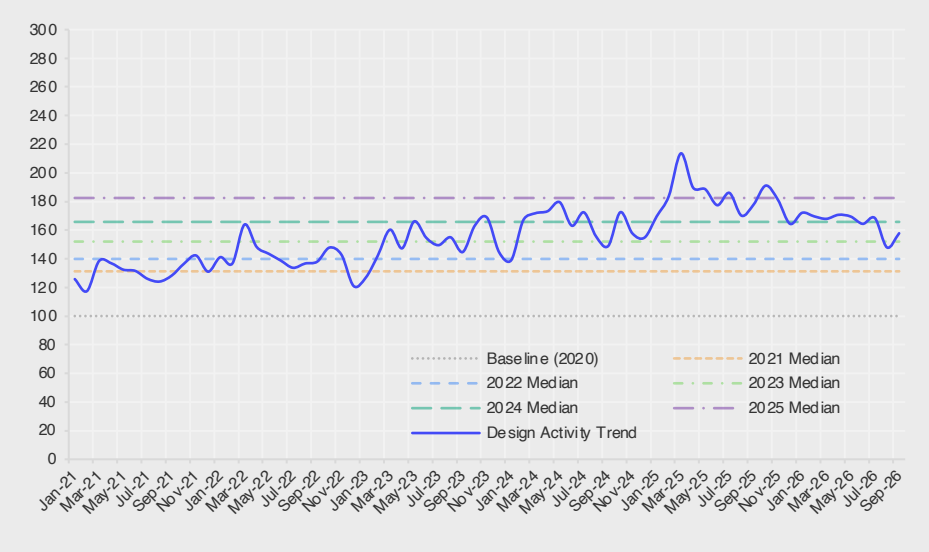
	vs. Prior Month	vs. Prior Year	6mo. CMGR
Global	6.7%	-11.3%	-1.0%

Region	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
EMEA	100.0	16.8%	-10.8%	-1.8%
APAC	71.4	-0.8%	-14.6%	0.2%
AMER	50.5	0.4%	-7.5%	-1.2%

Top 10 Countries / Territories

Country / Territory	Design Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	-1.6%	-7.5%	-0.5%
India	60.2	0.8%	-5.0%	0.3%
Germany	47.0	8.4%	-1.3%	0.3%
China (incl. Hong Kong)	40.9	13.9%	-24.5%	1.4%
Republic of Korea	25.8	-16.9%	-15.5%	-0.6%
Italy	23.9	61.1%	-8.2%	-2.1%
United Kingdom	21.8	-1.6%	-18.5%	-3.9%
France	18.2	28.1%	-16.0%	-2.9%
Turkey	16.7	14.5%	13.0%	3.7%
Spain	15.4	52.6%	3.2%	-3.0%

Chart 2. Global Design Activity Trend



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Design Activity Trend: Americas

September 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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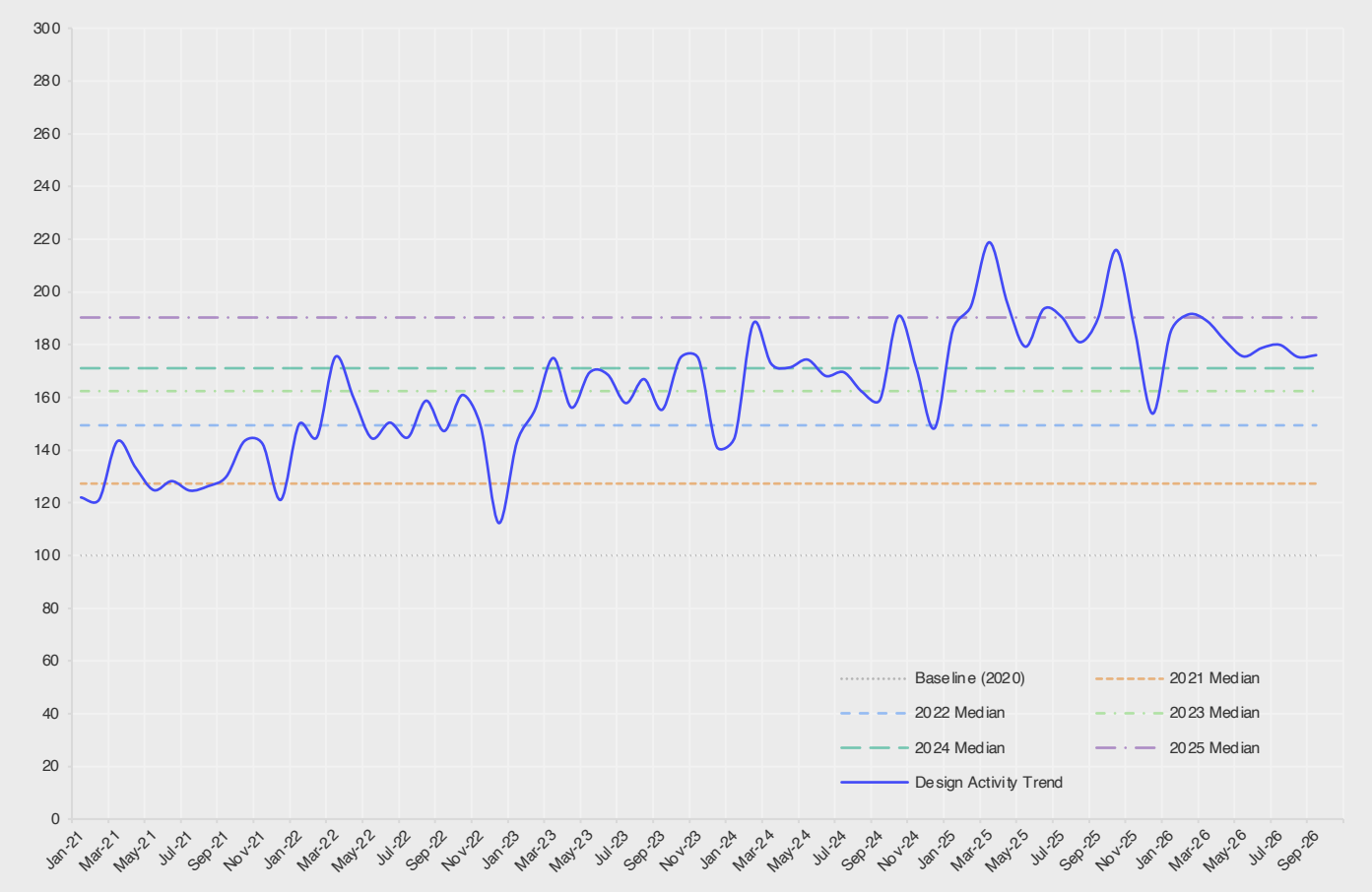
Chart 3. Americas Design Activity Trend



Product Group | AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	0%	-15%	-2%
Interconnects	81.6	-3%	-8%	-3%
Discrete Semiconductors	58.7	0%	3%	-1%
Power	57.5	2%	-8%	0%
Integrated Circuits	54.9	0%	-6%	0%
Embedded Processors and Controllers	20.5	30%	4%	2%
Electromechanicals	17.0	3%	2%	-1%
Optoelectronics	13.9	-6%	-23%	-2%
Sensors	10.9	18%	2%	5%
Circuit Protection	5.5	-2%	256%	18%
RF and Wireless	4.3	4%	-6%	-3%
Memory	3.9	13%	-29%	-4%

Product Class (Top 15) | AMER	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-3%	-7%	-2%
Power Circuits	76.9	4%	-6%	0%
Resistors	55.6	1%	-14%	-2%
Capacitors	52.0	2%	-22%	-2%
Diodes	52.0	-1%	4%	-1%
Transistors	34.4	1%	3%	-1%
Microcontrollers and Processors	30.6	30%	4%	2%
Inductors	25.5	0%	6%	-1%
Drivers And Interfaces	20.9	-6%	4%	-2%
Optoelectronics	20.3	-8%	-22%	-2%
Amplifier Circuits	19.1	-8%	-11%	0%
Logic	18.1	6%	-7%	2%
Terminal Blocks	17.8	-6%	-11%	-6%
Sensors/Transducers	16.2	18%	2%	5%
Switches	13.5	2%	1%	-1%

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Design Activity Trend: EMEA

September 2026

Design Activity Index

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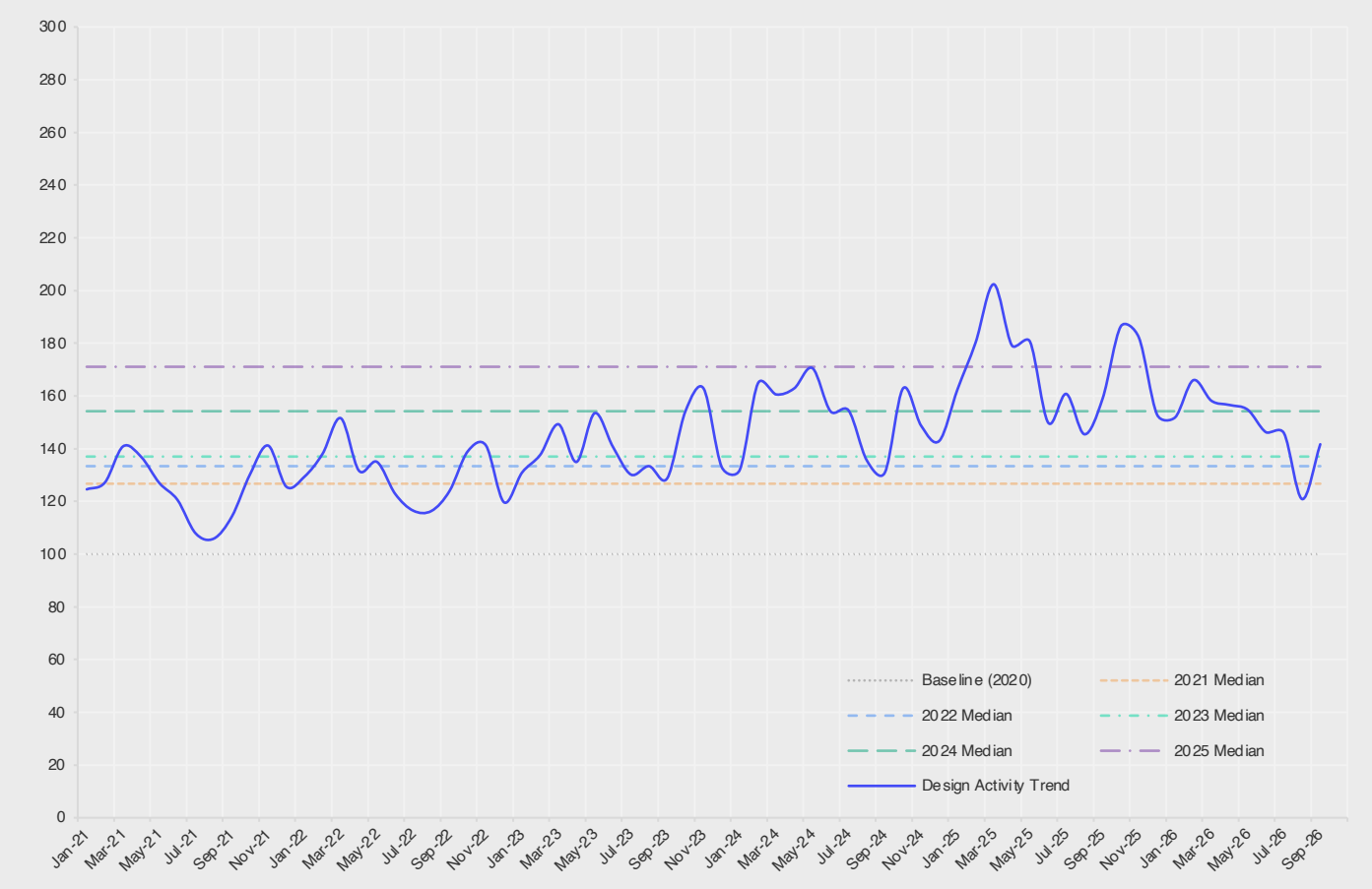
Chart 4. EMEA Design Activity Trend



Product Group | EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	17%	-18%	-3%
Interconnects	97.0	17%	-11%	-2%
Integrated Circuits	67.0	22%	-8%	-1%
Discrete Semiconductors	65.4	12%	-8%	-2%
Power	63.1	18%	-8%	-1%
Embedded Processors and Controllers	23.5	21%	-9%	1%
Electromechanicals	17.7	17%	-15%	-3%
Optoelectronics	16.0	18%	-14%	-3%
Sensors	7.8	1%	-11%	-2%
RF and Wireless	5.6	35%	11%	3%
Circuit Protection	5.6	5%	184%	13%
Memory	5.0	21%	-6%	1%

Product Class (Top 15) | EMEA	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	17%	-11%	-2%
Power Circuits	74.9	17%	-8%	-1%
Diodes	51.7	13%	-5%	-1%
Capacitors	41.8	24%	-20%	-4%
Resistors	39.3	18%	-28%	-5%
Transistors	33.7	11%	-13%	-3%
Microcontrollers and Processors	31.1	21%	-9%	1%
Inductors	29.5	5%	-7%	-1%
Terminal Blocks	25.0	14%	-11%	-3%
Drivers And Interfaces	24.3	25%	-4%	-1%
Optoelectronics	20.8	17%	-11%	-3%
Logic	19.7	33%	-4%	1%
Amplifier Circuits	19.0	22%	-12%	-4%
Filters	13.8	19%	-9%	1%
Signal Circuits	13.5	14%	-12%	-1%

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Design Activity Trend: APAC

September 2026

Design Activity Index

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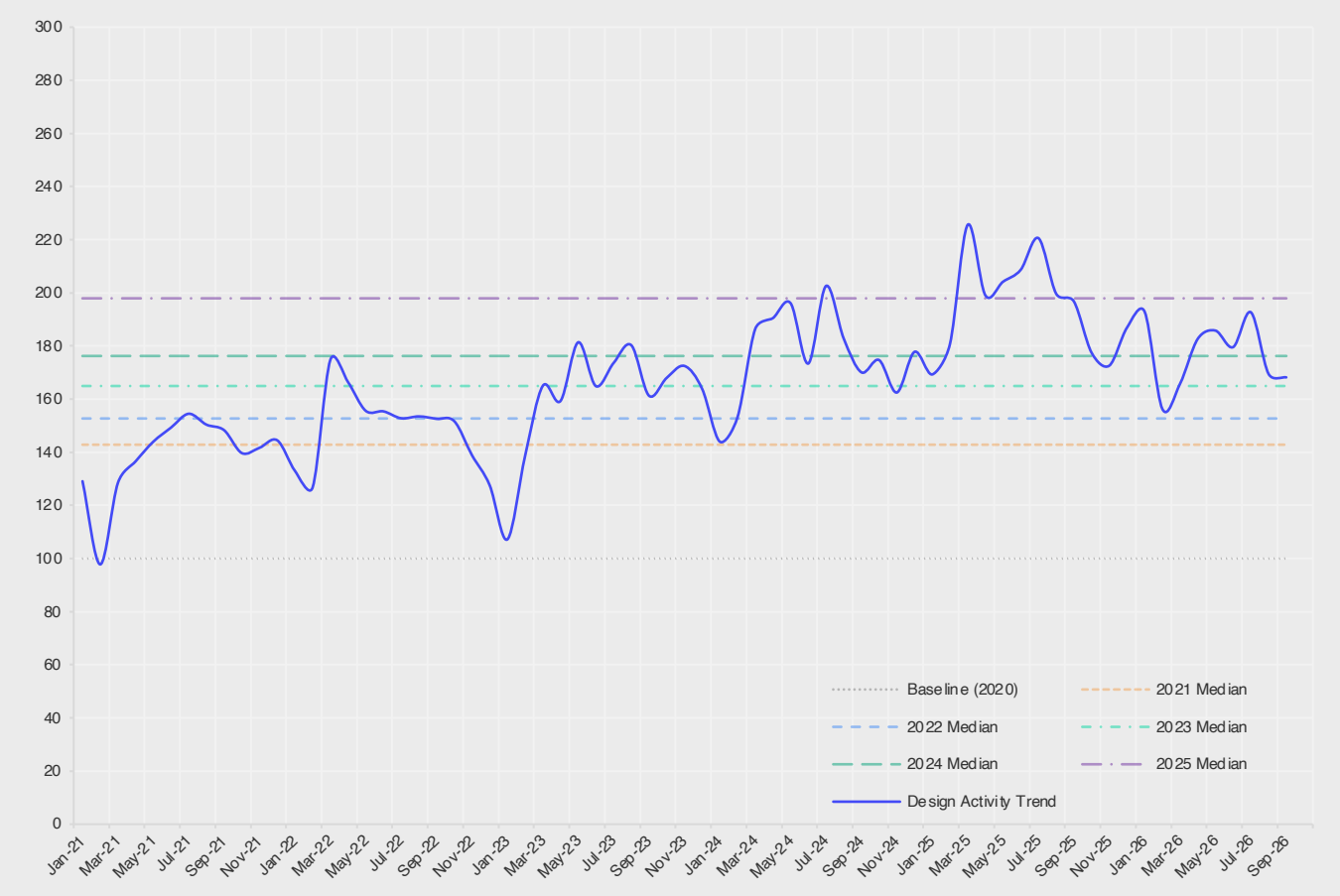
Chart 5. APAC Design Activity Trend



Product Group | APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	-1%	-19%	0%
Interconnects	78.6	-4%	-10%	0%
Integrated Circuits	66.5	1%	-13%	1%
Discrete Semiconductors	65.3	-7%	-19%	0%
Power	57.5	-7%	-19%	1%
Embedded Processors and Controllers	21.9	13%	-14%	1%
Optoelectronics	14.3	6%	-9%	2%
Electromechanicals	14.3	-5%	-11%	2%
Sensors	6.3	3%	-19%	-1%
Memory	5.5	16%	-13%	2%
RF and Wireless	5.5	15%	-14%	2%
Circuit Protection	3.9	-10%	103%	12%

Product Class (Top 15) | APAC	Design Activity Index	M/M%	Y/Y %	6mo. CMGR
Connectors	100.0	-5%	-12%	0%
Power Circuits	79.1	-8%	-19%	1%
Diodes	59.4	-8%	-16%	0%
Capacitors	52.4	-6%	-24%	-2%
Resistors	47.6	4%	-21%	0%
Transistors	38.6	-7%	-23%	-1%
Microcontrollers and Processors	33.1	13%	-14%	1%
Inductors	28.9	5%	-4%	0%
Drivers And Interfaces	28.2	5%	-17%	2%
Amplifier Circuits	22.6	-9%	-17%	-1%
Logic	21.6	11%	-3%	3%
Optoelectronics	21.5	7%	-6%	2%
Terminal Blocks	16.8	3%	2%	1%
Filters	15.6	-5%	-17%	1%
Signal Circuits	14.9	0%	-12%	2%

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Sourcing Activity Summary

September 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 remain stable.

- Global sourcing activities increased +4% MoM and +11% YoY. Month-over-month growth in activities were primary seen in EMEA (+35%), while APAC observed a -3% decrease, and the Americas remained flat. Compared to last year, all regions observed growth in sourcing activities.
- **EMEA observed exceptional growth in sourcing activities month-over-month and year-over-year.** Activities increased +35% MoM and +34% YoY. Growth in sourcing activities were observed across all key countries. Top product categories included: capacitors (+29%); connectors (+32%); microcontrollers and processors (+37%); and power components (+20%).
- **APAC sourcing activities remained above last year despite a monthly decline.** Regional activities decreased -3% MoM but increased +4% YoY. Notable year-over-year increases were observed in India (+24%), Taiwan (+24%), Malaysia (+65%), Thailand (+75%), and the Philippines (+52%). Demand for components used in AI and data centers may be contributing to the sourcing activity growth in these markets.
- **The United States led sourcing activity growth in the Americas.** Regional activities increased +1% MoM and +10% YoY. The United States led the overall growth in the region with +2% MoM and +20% YoY increases in activities. Top product groups driving the growth were passives (+23%), discrete semiconductors (+51%), integrated circuits (+29%), embedded processors and controllers (+46%), and memory (+36%).

Table 2. Sourcing Activity Summary

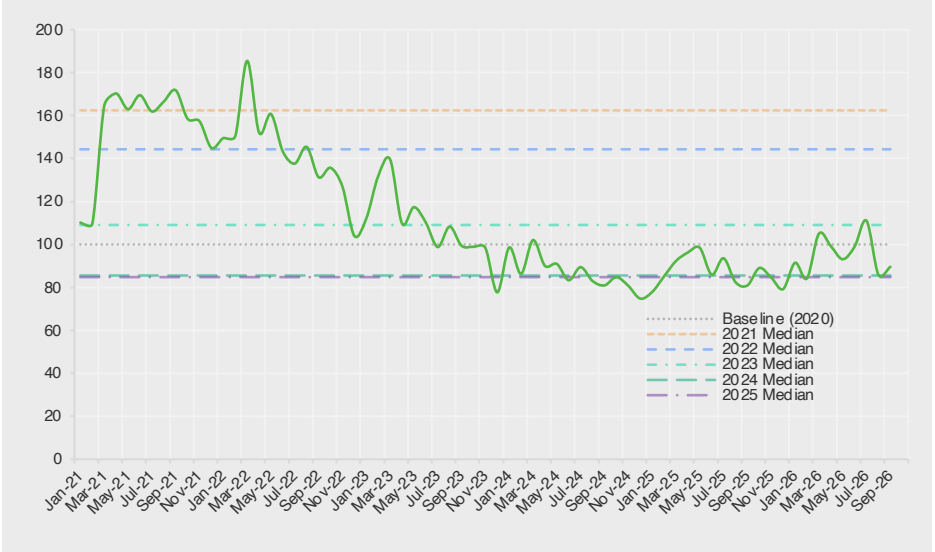
	vs. Prior Month	vs. Prior Year	6mo. CMGR
Global	4.3%	10.7%	-2.6%

Region	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
APAC	100.0	-2.7%	4.0%	-3.4%
AMER	60.4	0.9%	9.8%	-2.0%
EMEA	40.2	35.1%	33.5%	-1.3%

Top 10 Countries / Territories

Country / Territory	Sourcing Activity Index	vs. Prior Month	vs. Prior Year	6mo. CMGR
United States	100.0	1.7%	19.6%	-1.0%
China (incl. Hong Kong)	82.0	-8.7%	-14.7%	-7.0%
India	40.4	2.5%	24.3%	0.2%
Republic of Korea	23.4	5.8%	0.6%	-1.9%
Germany	19.7	16.8%	37.5%	-0.8%
Malaysia	17.1	2.2%	64.5%	3.6%
Taiwan	15.6	-7.0%	23.8%	-1.4%
Mexico	8.8	-3.7%	11.0%	-1.6%
Singapore	8.5	-6.0%	5.7%	-2.0%
Canada	8.1	-1.0%	-7.0%	-3.2%

Chart 6. Global Sourcing Activity Trend



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Sourcing Activity Trend: Americas

September 2026

Sourcing Activity Index

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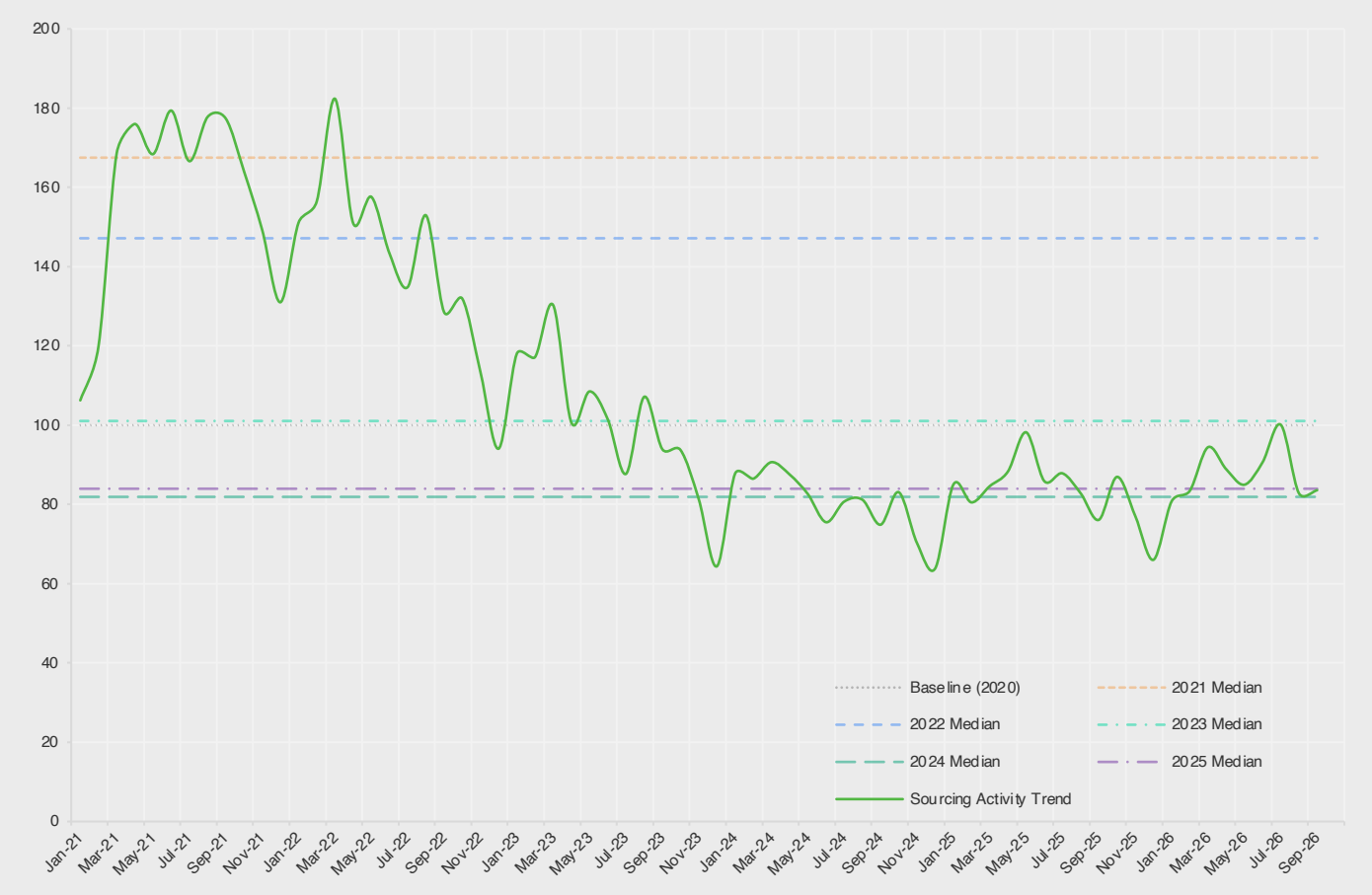
Chart 8. Americas Sourcing Activity Trend



Product Group | AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	1%	15%	0%
Interconnects	78.9	3%	1%	-3%
Discrete Semiconductors	40.9	0%	27%	-3%
Integrated Circuits	30.6	-3%	12%	-3%
Power	25.5	-3%	6%	-3%
Embedded Processors and Controllers	13.5	7%	26%	1%
Electromechanicals	9.7	4%	-17%	-4%
Optoelectronics	8.5	5%	-8%	-2%
Memory	6.4	-1%	21%	-9%
Circuit Protection	3.6	6%	32%	1%
Sensors	3.6	1%	7%	-3%
RF and Wireless	2.4	-6%	-24%	-6%

Product Class (Top 15) | AMER	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Capacitors	100.0	5%	46%	4%
Connectors	94.9	4%	-1%	-3%
Resistors	58.2	-5%	-13%	-4%
Power Circuits	43.7	0%	8%	-2%
Diodes	43.0	-2%	32%	-3%
Connector Support	40.1	5%	9%	-1%
Transistors	35.0	3%	26%	-3%
Microcontrollers and Processors	26.2	7%	26%	1%
Inductors	19.8	2%	11%	0%
Terminal Blocks	17.2	-5%	-3%	-4%
Optoelectronics	15.9	5%	-9%	-2%
Amplifier Circuits	14.6	-10%	20%	-1%
Drivers And Interfaces	13.3	-3%	11%	-3%
Logic	12.6	4%	11%	-5%
Memory	12.5	-1%	21%	-9%

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Sourcing Activity Trend: EMEA

September 2026

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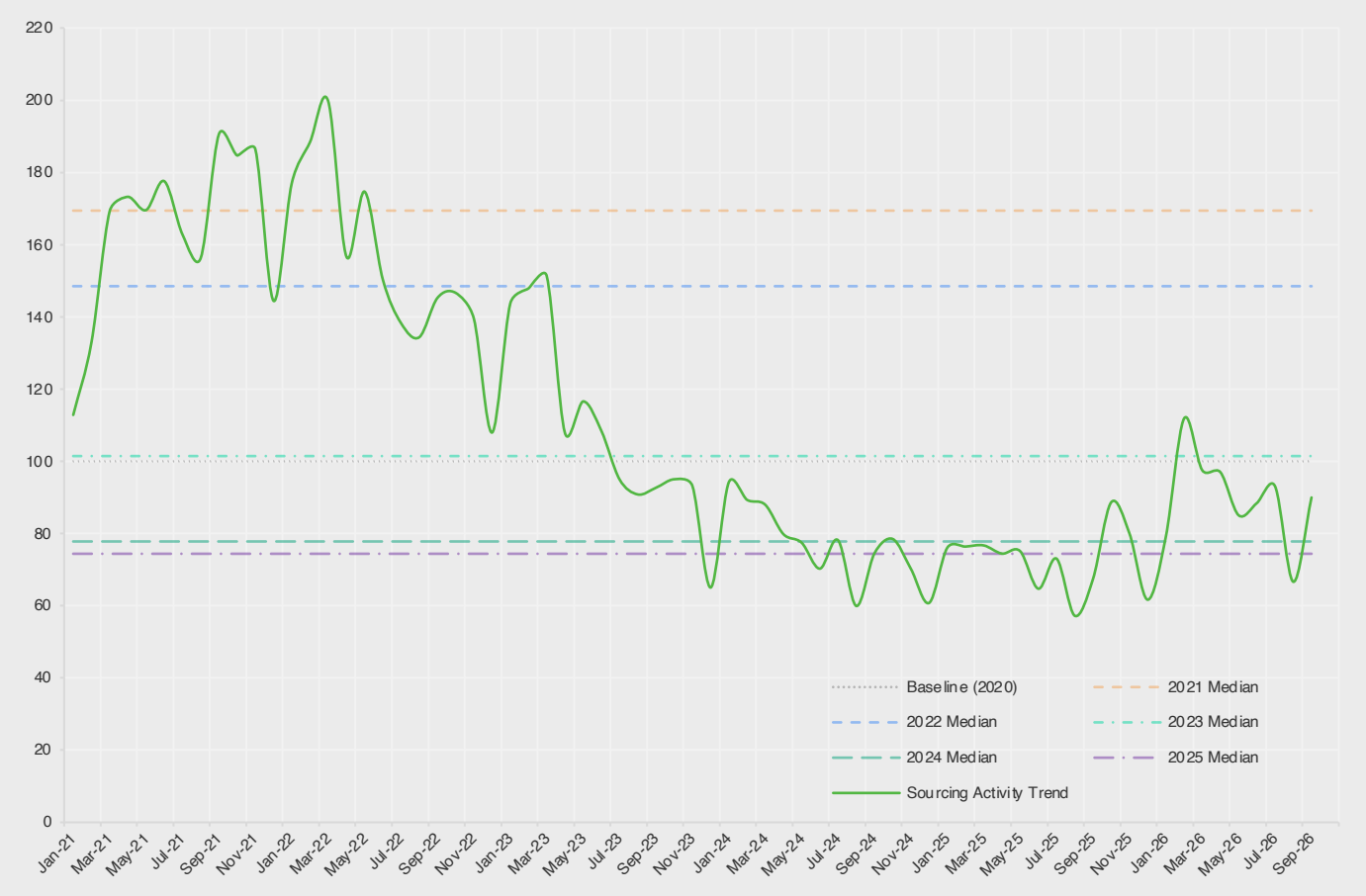
Chart 9. EMEA Sourcing Activity Trend



Product Group | EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	29%	35%	1%
Integrated Circuits	61.0	86%	78%	0%
Discrete Semiconductors	59.1	23%	66%	-2%
Interconnects	54.0	33%	8%	-3%
Power	30.0	20%	11%	-3%
Embedded Processors and Controllers	19.6	37%	39%	1%
Optoelectronics	9.9	34%	9%	-2%
Electromechanicals	9.0	32%	-13%	-5%
Memory	8.9	28%	55%	-6%
Sensors	4.7	33%	24%	-3%
Circuit Protection	3.3	25%	30%	1%
RF and Wireless	2.2	6%	-15%	-5%

Product Class (Top 15) | EMEA	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Capacitors	100.0	29%	60%	4%
Connectors	73.6	32%	9%	-3%
Diodes	62.7	19%	75%	-2%
Resistors	60.7	30%	18%	-2%
Amplifier Circuits	58.1	263%	271%	2%
Transistors	54.6	27%	60%	-2%
Power Circuits	52.7	19%	12%	-2%
Microcontrollers and Processors	39.5	37%	39%	1%
Connector Support	22.7	33%	3%	-3%
Inductors	21.5	27%	13%	-2%
Drivers And Interfaces	20.8	31%	22%	-1%
Optoelectronics	19.2	34%	9%	-2%
Memory	17.9	28%	55%	-6%
Logic	16.2	34%	26%	-3%
Filters	12.8	27%	21%	0%

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Sourcing Activity Trend: APAC

September 2026

Sourcing Activity Index

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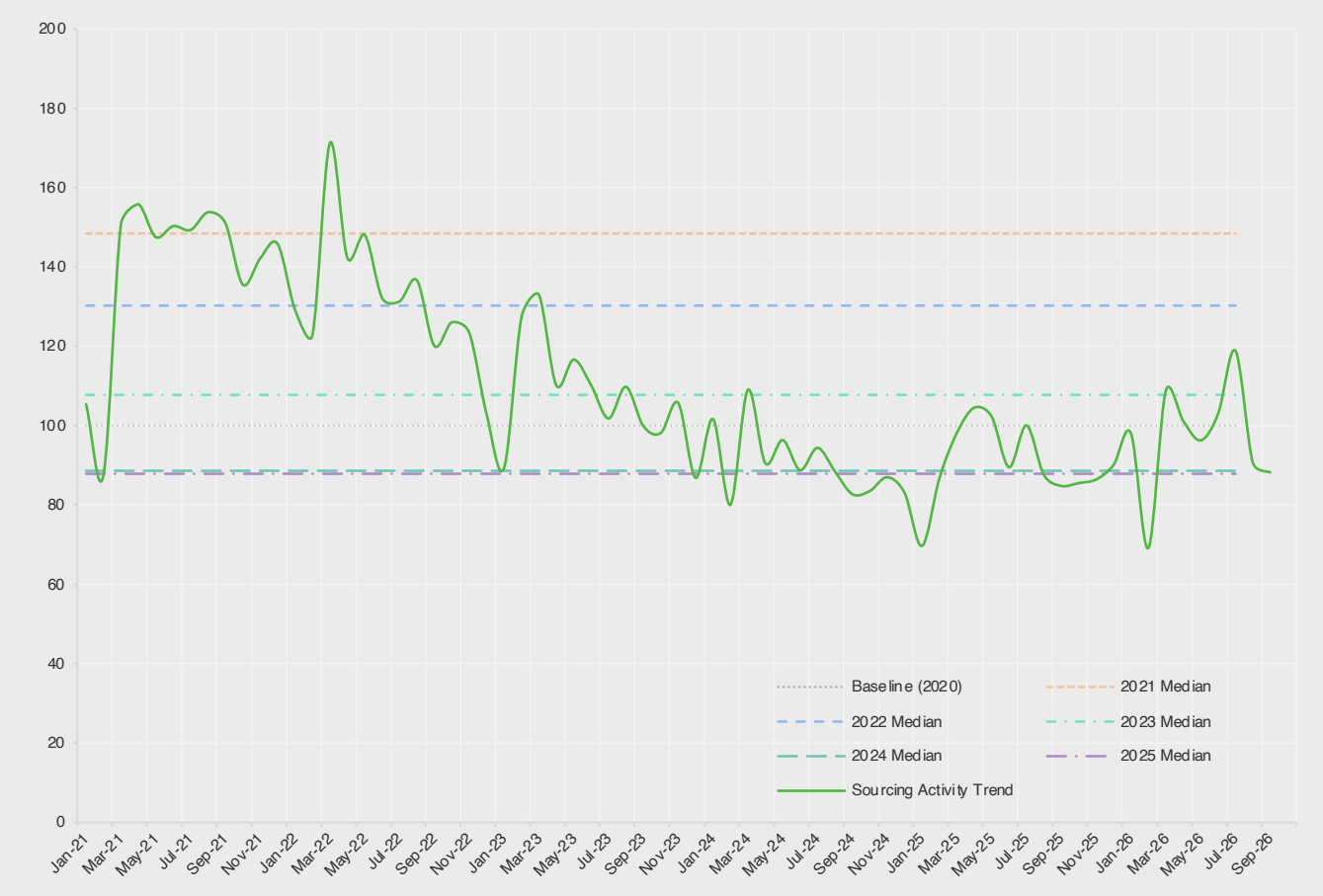
Chart 10. APAC Sourcing Activity Trend

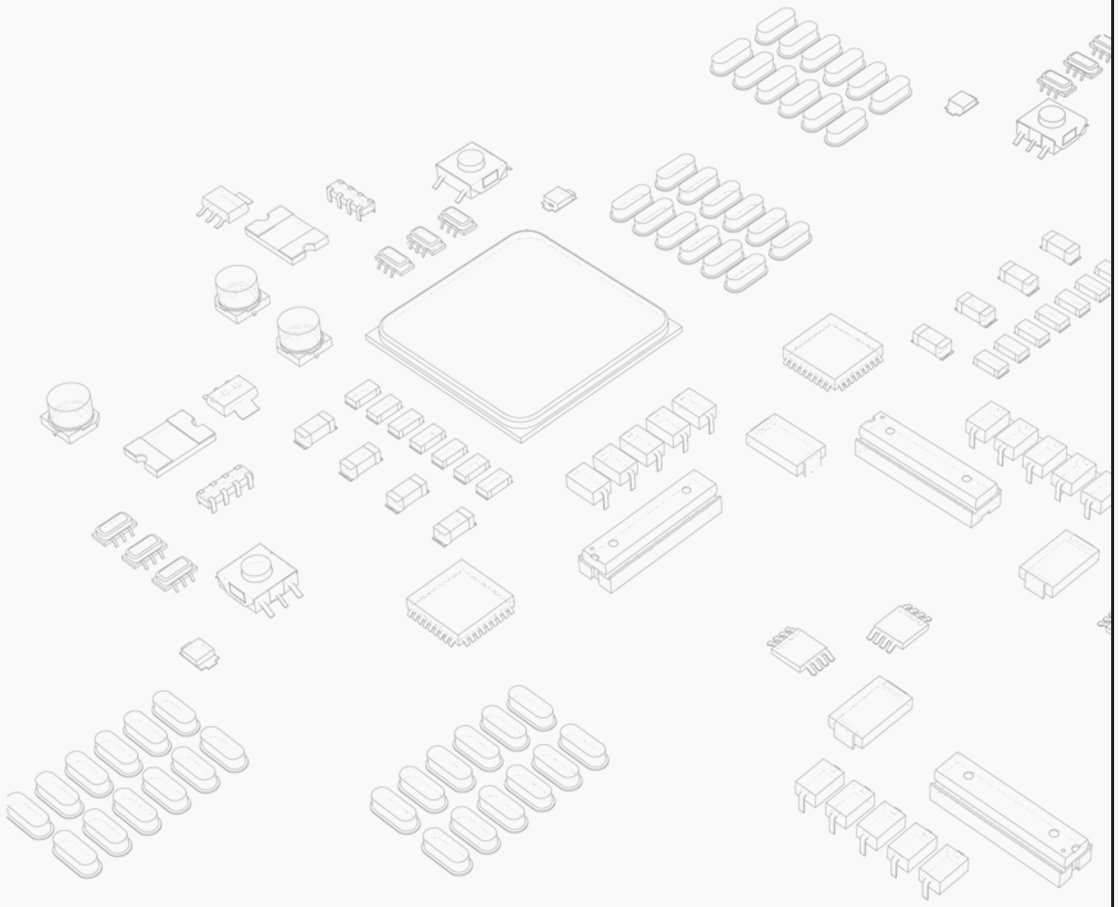


Product Group | APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Passives	100.0	0%	34%	2%
Interconnects	55.6	3%	-11%	-4%
Discrete Semiconductors	43.6	-4%	26%	-5%
Integrated Circuits	34.8	-9%	-8%	-6%
Power	26.3	-13%	-17%	-7%
Embedded Processors and Controllers	14.9	-2%	-5%	-6%
Electromechanicals	8.0	2%	-22%	-5%
Optoelectronics	7.8	4%	-14%	-3%
Memory	7.0	-8%	-9%	-11%
Sensors	4.0	1%	-10%	-8%
Circuit Protection	3.1	0%	6%	0%
RF and Wireless	3.0	-24%	-41%	-9%

Product Class (Top 15) | APAC	Sourcing Activity Index	M/M%	Y/Y %	6mo. CMGR
Capacitors	100.0	-2%	58%	5%
Connectors	73.1	3%	-14%	-4%
Resistors	61.7	7%	28%	1%
Diodes	45.7	-3%	28%	-5%
Power Circuits	45.0	-10%	-11%	-6%
Transistors	39.5	-4%	26%	-5%
Microcontrollers and Processors	29.7	-2%	-5%	-6%
Connector Support	26.3	2%	-2%	-3%
Inductors	18.4	-4%	2%	-1%
Drivers And Interfaces	16.0	-7%	-2%	-5%
Optoelectronics	15.0	4%	-15%	-3%
Amplifier Circuits	14.5	-22%	-16%	-5%
Logic	14.3	2%	13%	-6%
Memory	14.0	-8%	-9%	-11%
Filters	12.2	-3%	6%	-3%

Supplyframe

Recap

September 2026

- **Design and sourcing activities stabilized in September after August's correction.** Both measures improved month-over-month driven by strong growth in EMEA.
- **Components suitable for AI / data center applications continued to be in high demand.** Across passives, interconnects, and semiconductor devices, components related to AI and data center applications led the year-over-year growth trends. Furthermore, activities in countries where design and manufacturing of equipment used in these applications observed larger growth rates.
- **Continued high demand for memory, capacitors, and semiconductor devices could add to existing supply pressures.** Buyers should monitor availability and lead times for these categories, as well as critical interconnects, and qualify alternative sources where practical.
- Q4 global design activities are projected to remain flat QoQ, while global sourcing activities are expected decrease -5% QoQ.