

Double-Digit Sales Growth Continues 17-Months and Counting

August bookings increased by +58.9%, while billings increased by +23.9%.

Regional Performance:

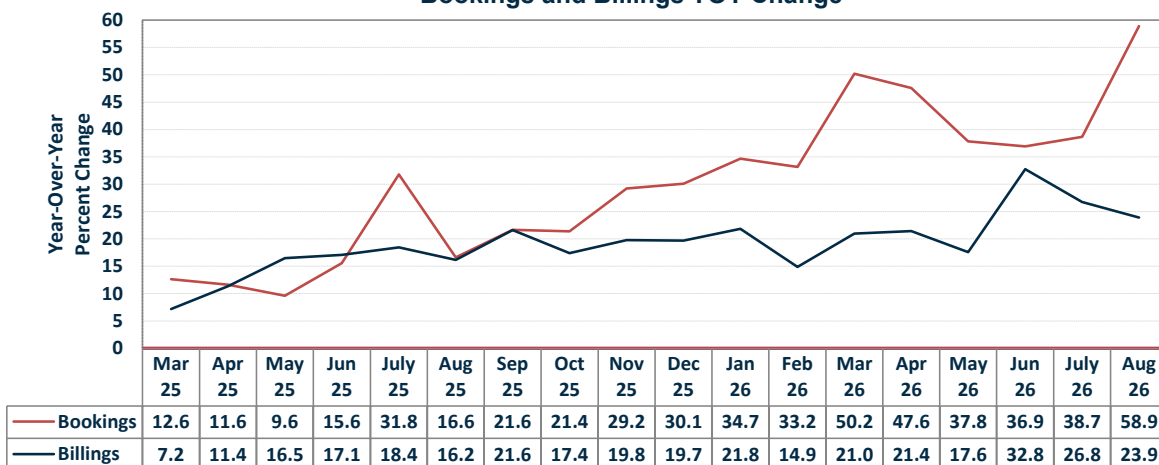
Year-to-date, sales for August are positive in all regions. The greatest growth, as was seen in the last eight months, is in the Asia Pacific region. Still positive, the weakest growth was once again seen in the Japanese region. From a booking perspective, all regions showed positive year-over-year double or triple-digit growth, with the greatest growth in North America. Sequentially, three of the six regions showed growth in bookings, with the greatest growth in North America. See page 5.

2026 Currency Impact:

The industry registered a YOY increase in sales in August 2026, of +23.9 in USD and +21.2% in local currency.

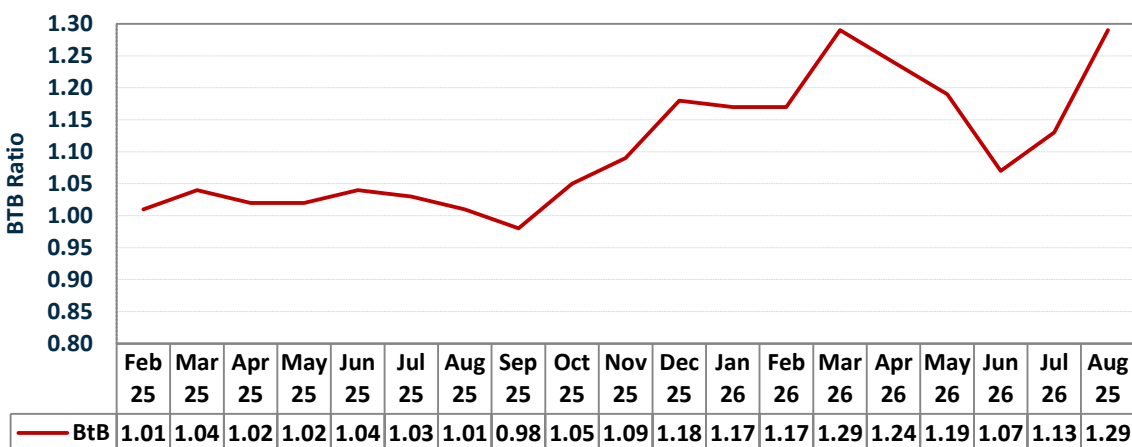
**NEW BISHOP
RESEARCH REPORT**
**Top 100
Connector
Manufacturers**

Bookings and Billings YOY Change



The book-to-bill ratio in August was 1.29, up from 1.13 in July. This is the 21st time in the last 23 months that the book-to-bill was over 1.00.

Connector Industry Book-to-Bill

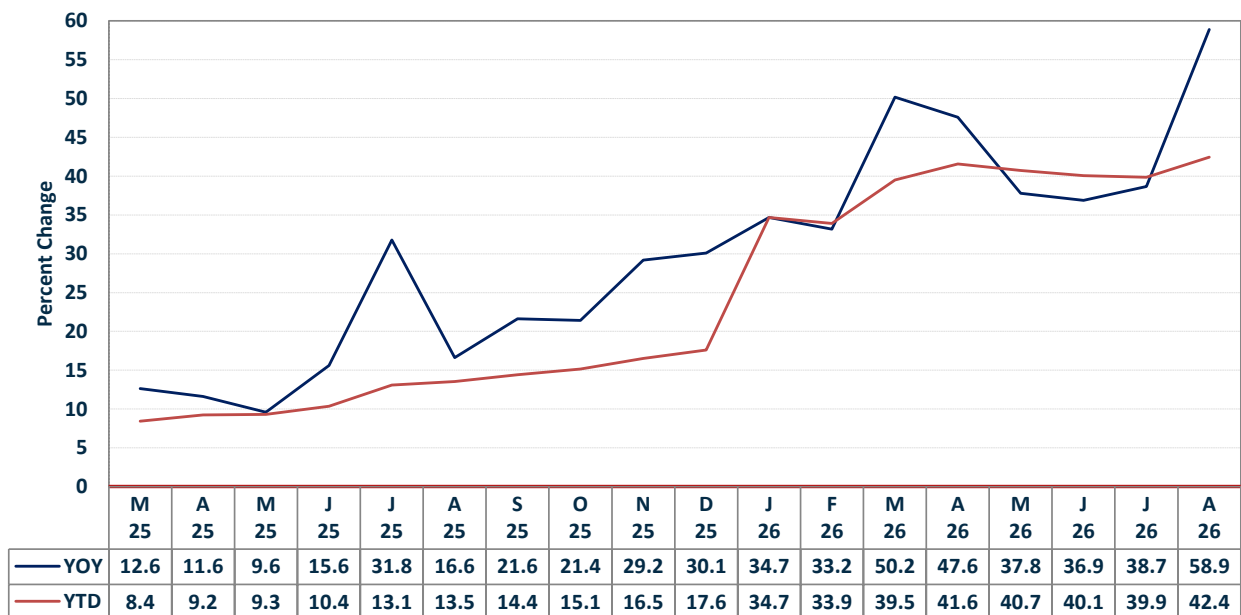


Booking Highlights and Conclusions

Sequential, Year-Over-Year, and Year-To-Date Bookings Percentage Change – 2024/2025/2026

Month	Sequential			Year-Over-Year			Year-To-Date		
	2024	2025	2026	2024	2025	2026	2024	2025	2026
Jan	9.1%	2.2%	5.8%	8.3%	7.3%	34.7%	8.3%	7.3%	34.7%
Feb	5.2%	5.6%	4.4%	6.8%	5.5%	33.2%	7.5%	6.4%	33.9%
Mar	-2.9%	2.2%	15.2%	-1.4%	12.6%	50.2%	4.4%	8.4%	39.5%
Apr	3.2%	-0.8%	-2.5%	10.2%	11.6%	47.6%	5.8%	9.2%	41.6%
May	9.1%	11.9%	4.5%	5.8%	9.6%	37.8%	5.8%	9.3%	40.7%
Jun	-6.8%	-5.2%	-5.9%	11.3%	15.6%	36.9%	6.7%	10.4%	40.1%
Jul	-5.8%	0.1%	1.5%	4.4%	32.0%	38.7%	6.4%	13.1%	39.9%
Aug	11.6%	5.3%	20.6%	7.3%	16.6%	58.9%	6.5%	13.5%	42.4%
Sep	-5.0%	-3.5%		8.7%	21.6%		6.8%	14.4%	
Oct	9.6%	3.8%		20.9%	21.4%		8.1%	15.1%	
Nov	4.9%	15.1%		15.4%	29.2%		8.8%	16.5%	
Dec	-21.6%	-7.8%		5.2%	30.1%		8.6%	17.6%	

Bookings - YOY and YTD



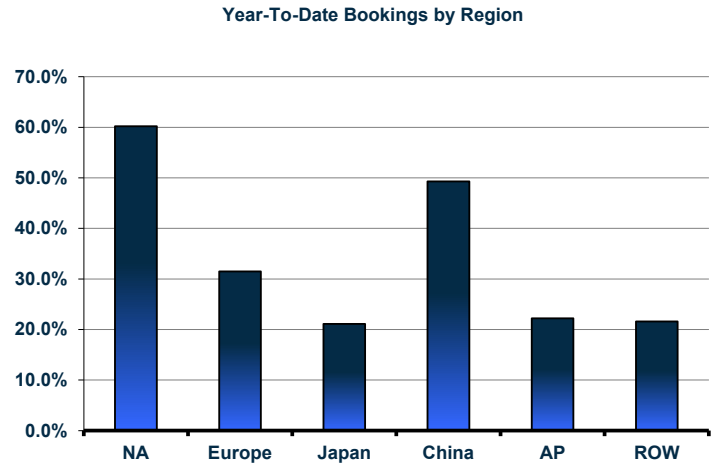
- August bookings increased +58.9% year-over-year.
- Orders increased +20.6% on a sequential basis in August.
- The book-to-bill ratio for August was 1.29, up from 1.13 in July.

Regional Performance: BOOKINGS

August 2026 Bookings

Region	Sequential	YOY	YTD
NA	56.3%	110.7%	60.2%
Europe	3.0%	40.9%	31.5%
Japan	-25.9%	17.4%	21.1%
China	-1.1%	56.7%	49.3%
AP	48.4%	3.6%	22.2%
ROW	-0.5%	28.8%	21.6%
Total	20.6%	58.9%	42.4%

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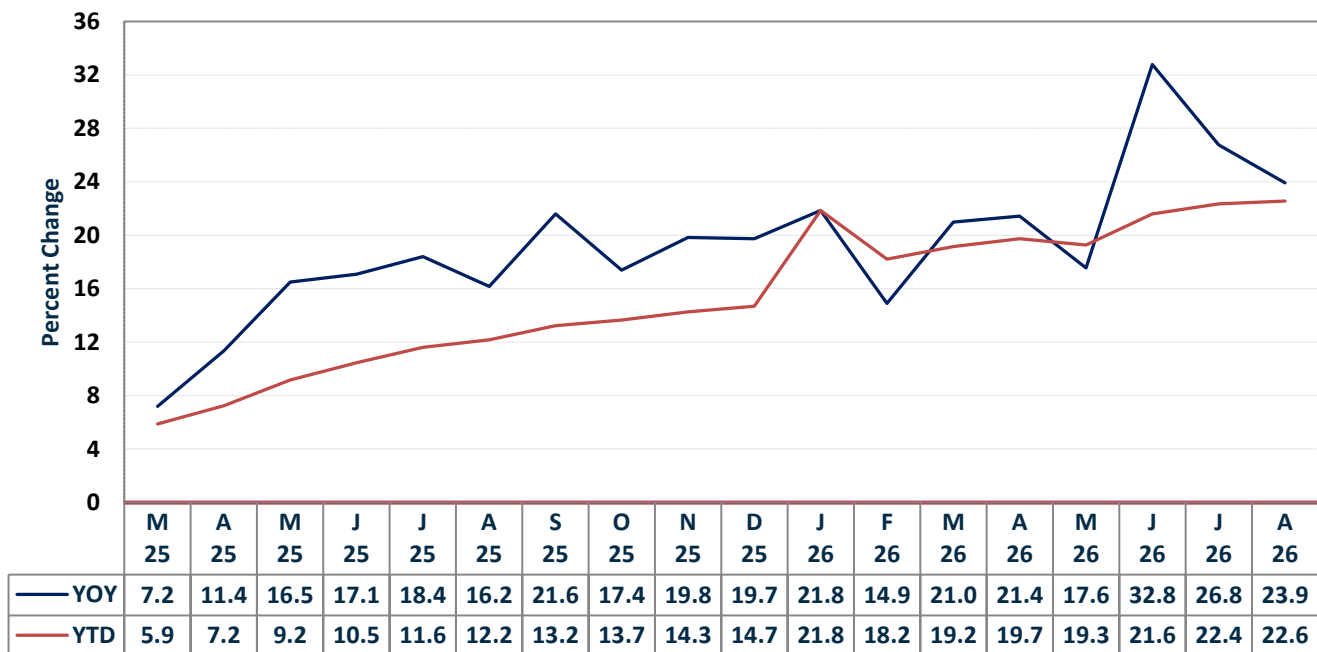
- Year-to-date, August bookings increased +42.4%, with the greatest growth in the North American region, where bookings increased +60.2%, followed by China with growth of +49.3% and the European region where bookings increased +31.5%. The lowest growth was seen in the Japanese region, where year-to-date bookings increased +21.1%.
- From a year-over-year perspective, total world sales grew +58.9, up from +39.9% in July, with the greatest growth in the North American region, at +110.7%, followed by the Chinese region, where year-over-year bookings increased +56.7%. The least growth, like in July, was seen in the Asia Pacific region where bookings increased only +3.6%.
- Sequentially, bookings grew in three of the six regions, North America, where bookings grew +56.3%, Asia Pacific, where bookings grew +48.4%, and the European region where bookings grew +3.0%. The remaining regions, Japan, China, and the ROW region saw sequential bookings decline, with the greatest decrease in Japan, where sequentially booking decreased -25.9%.
- Year-over-year total world order growth has now been positive for 29 consecutive months.

Billing Highlights and Conclusions

Sequential, Year-Over-Year, and Year-To-Date Billings Percentage Change – 2024/2025/2026

Month	Sequential			Year-Over-Year			Year-To-Date		
	2024	2025	2026	2024	2025	2026	2024	2025	2026
Jan	5.8%	5.5%	7.4%	3.5%	2.3%	21.9%	3.5%	2.3%	21.9%
Feb	2.8%	9.9%	3.6%	-1.0%	7.9%	15.0%	1.2%	5.2%	18.2%
Mar	0.4%	-0.1%	5.2%	-1.1%	7.2%	21.1%	0.4%	5.9%	19.2%
Apr	1.7%	1.1%	1.5%	10.1%	11.4%	21.4%	2.7%	7.2%	19.7%
May	4.3%	11.6%	8.1%	2.8%	16.5%	17.6%	2.7%	9.2%	19.3%
Jun	-4.9%	-6.9%	5.1%	3.3%	17.1%	32.8%	2.8%	10.5%	21.6%
Jul	1.8%	0.9%	-3.6%	7.1%	18.4%	26.8%	3.4%	11.6%	22.4%
Aug	5.8%	7.4%	5.0%	5.6%	16.2%	23.9%	3.7%	12.2%	22.6%
Sep	-3.0%	-0.2%		5.1%	21.6%		3.9%	13.2%	
Oct	3.2%	-3.3%		10.4%	17.4%		4.5%	13.7%	
Nov	5.1%	10.4%		9.5%	19.8%		5.0%	14.3%	
Dec	-9.5%	-14.9%		13.0%	19.7%		5.6%	14.7%	

Billings - YOY and YTD



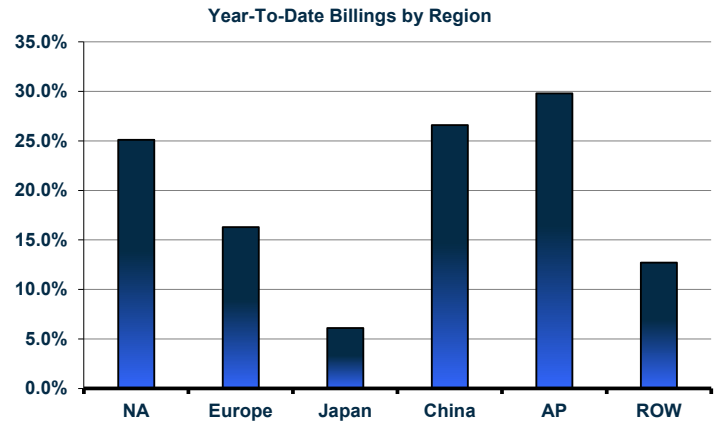
- August billings grew +23.9% year-over year and +22.6% year-to-date.
- Sequentially, August billings increased +5.0, after declining -3.6% in July.
- Year-over-year sales growth has now been positive for 29 consecutive months and year-to-date for 32 consecutive months.

Regional Performance: BILLINGS

August 2026 Billings

Region	Sequential	YOY	YTD
NA	8.3%	29.9%	25.1%
Europe	7.3%	19.1%	16.3%
Japan	1.8%	12.5%	6.1%
China	6.8%	40.6%	26.6%
AP	-12.4%	-4.1%	29.8%
ROW	25.5%	10.7%	12.7%
Total	5.0%	23.9%	22.6%

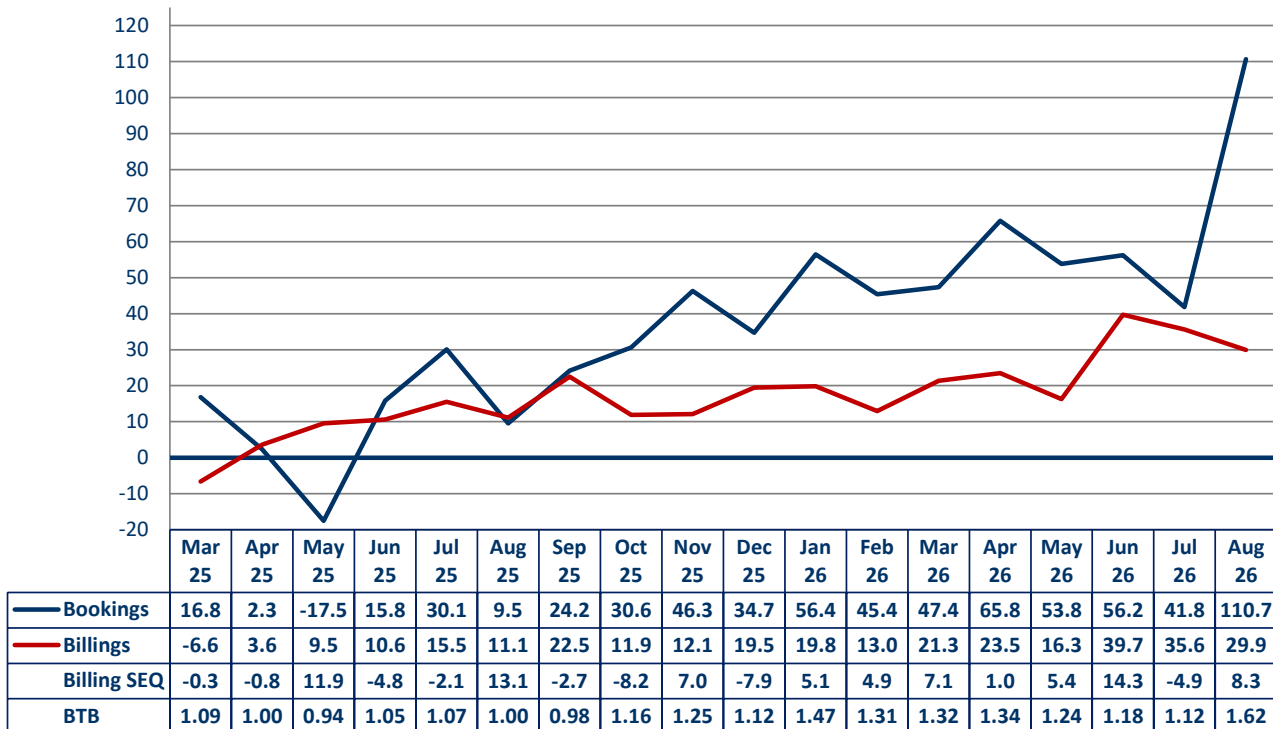
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- August connector sales increased by +23.9% compared to the same period last year, and +22.6% year-to-date.
- Sequentially, only one of the six regions showed a decrease, the remaining five all showed an increase, with the greatest increase in the ROW region, where billings increased by +25.5%. The ROW region was followed by North America, where sales sequentially grew +8.3%. Asia Pacific, the only region showing a decline, decreased -12.4% sequentially.
- Year-over-year, five of the six regions saw an increase, with the greatest increase, in the Chinese region where sales increased +40.6%, followed by the North American region, where sales increased +29.9%.

North America: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill (BTB) ratio is also displayed.

**North America Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio**

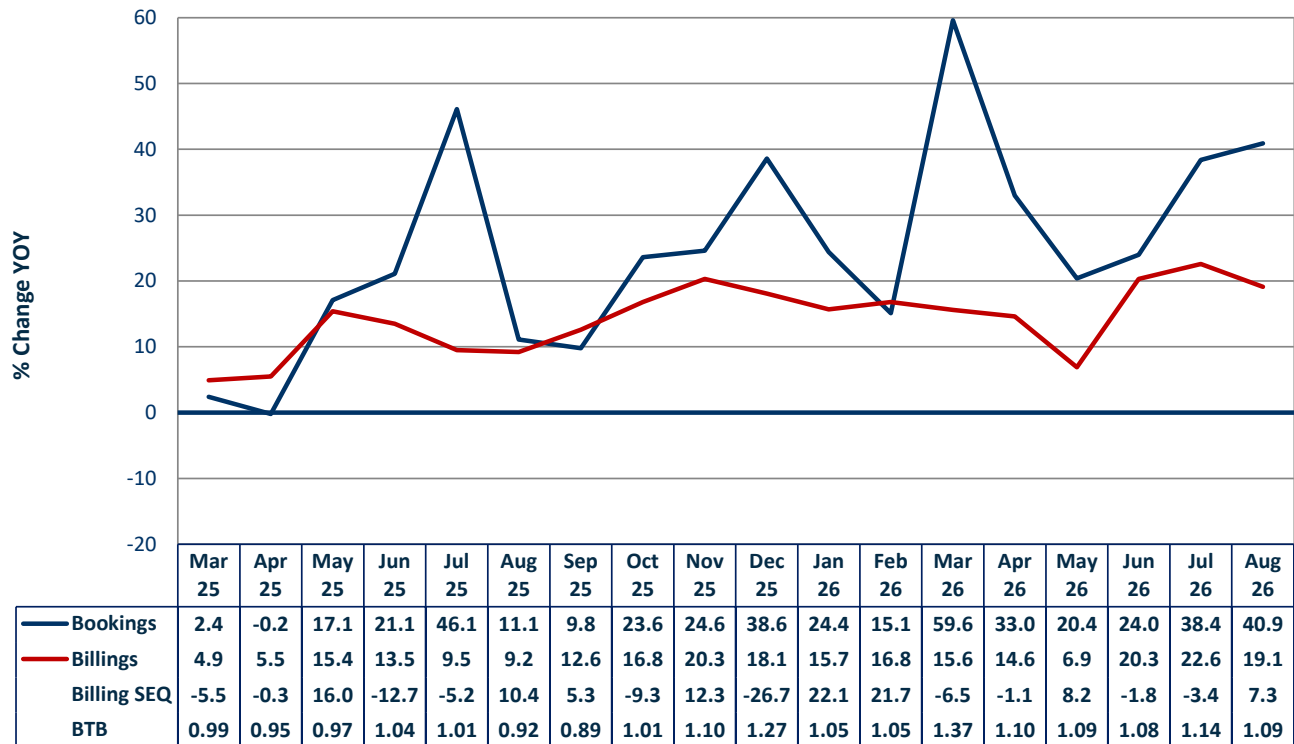


North America Performance

- Sales increased +29.9% year-over-year in August, while orders increased +110.7%, up from +41.8% in July. Sequentially, North American billings increased 8.3%, up from -4.9% in July. The book-to-bill ratio increased to 1.62, up from July's 1.12.
- The US unemployment rate remained at 4.1% in August. According to the U.S. Bureau of Labor Statistics, employment increased in food services and drinking places and in local government education, while the information industry lost jobs. At the same time, the Consumer Price Index for All Urban Consumers (CPI-U) rose 0.4% seasonally adjusted in August 2026, marking a 3.4% increase over the last 12 months.
- "New light-vehicle sales in August 2026 were solid, recording a SAAR of 16.8 million units, an increase of 1.5% year over year. Raw sales volume in August 2026 was 1.38 million units, an increase of 1.3% compared to July 2026. Year to date through August 2026, new light-vehicle sales are tracking at a 16.1 million-unit SAAR, slightly above our forecast of 16.0 million units for all of 2026", according to NADA.
- U.S. consumer sentiment fell to 51.7 in August 2026 (down from 55.2 in July), ending two consecutive months of recovery amid rising inflation worries linked to Middle East conflict. This displayed the lowest reading in four months, down 15% from January 2026, according to University of Michigan. It is anticipated to tick down even more based on preliminary data for September.

Europe: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

Europe Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio



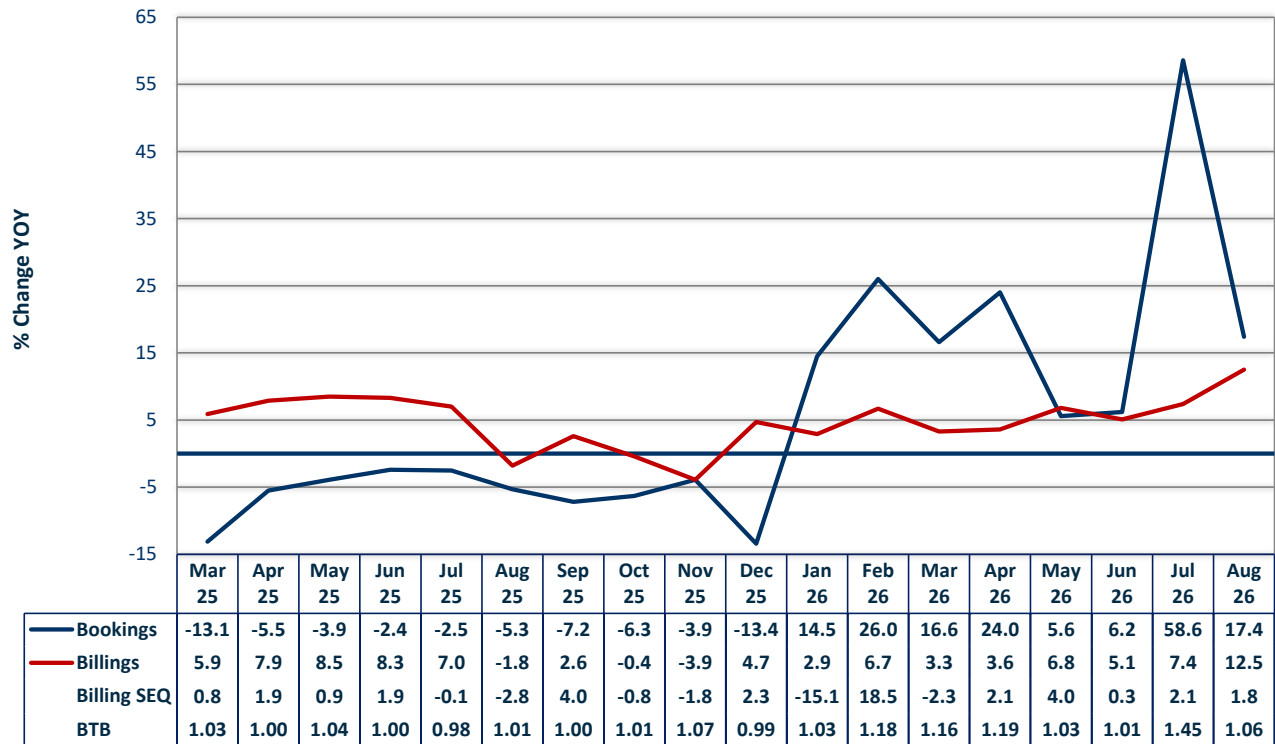
Europe Performance

- Bookings increased by +40.9% in August, up from +38.4 in July. Billings increased by +19.1%, down from +22.6% in July. Sequentially, sales increased by +7.3%, up from -3.4% in July. The book-to-bill ratio was 1.09 down from 1.14 in July.
- "New EU car registrations rose by 5.3% YTD, against a backdrop of rising energy prices and persistent geopolitical uncertainty. Demand for a range of EVs remained strong, driven by market support measures and a broader model offering. Through Aug., battery-electric cars held a 21.7% share of the EU market, up from 15.8% a year earlier. Hybrid-electric car registrations captured 36.6% of the market, remaining the preferred choice among EU consumers. At the same time, the combined market share of petrol and diesel cars fell to 29%, compared with 37.5% a year earlier", according to ACEA.
- "In July* 2026, the euro area seasonally adjusted unemployment rate was 6.4%, stable compared with May and June 2026, but up slightly from July 2025. The EU unemployment rate was 6.1% in July* 2026, also stable compared with June 2026 as well as June 2025", according to Eurostat.
- "In August 2026, the Economic Sentiment Indicator (ESI) increased in both the EU (+1.0 to 98.2) and the euro area (+1.3 points to 98.4). The Employment Expectations Indicator (EEI) also picked up compared to July (EU: +1.2 points to 99.0; euro area: +1.5 points to 98.9). Both indicators have returned close to their long-term averages of 100", according to European Commission.

**August readings not published at the time of this reporting.*

Japan: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

Japan Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio

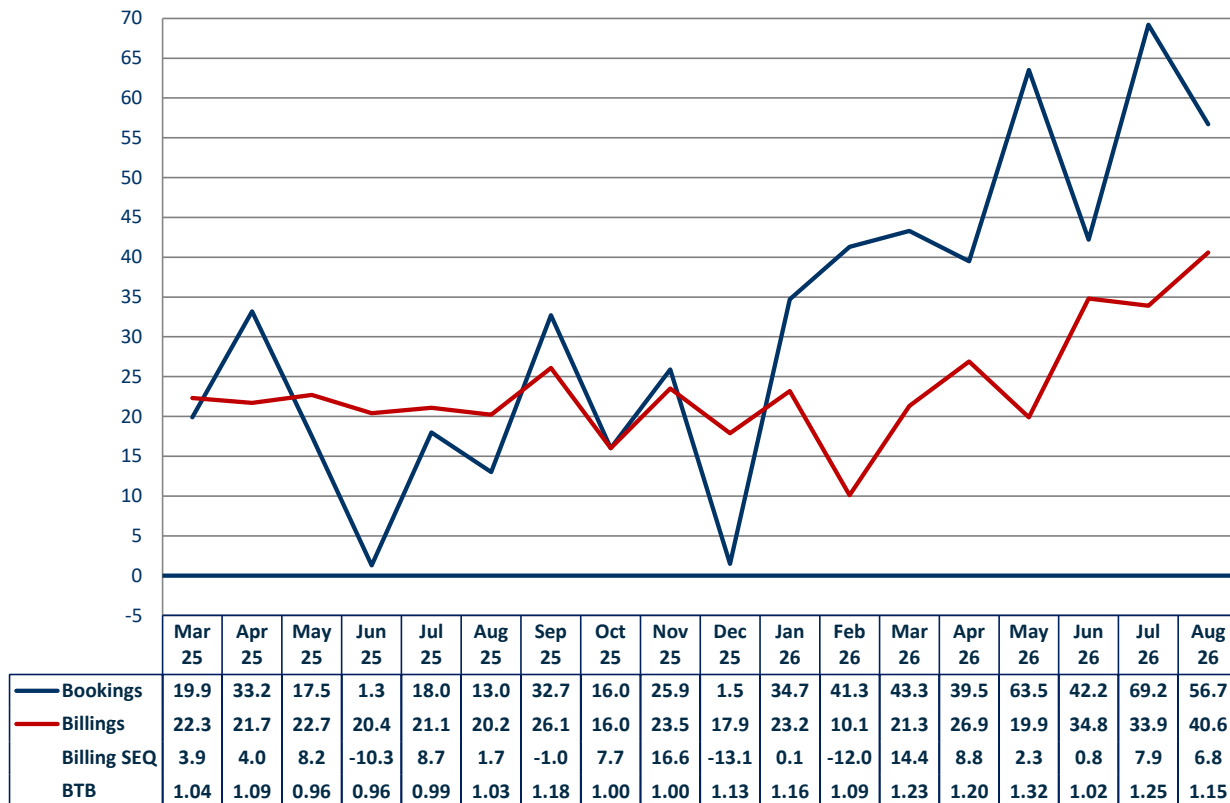


Japan Performance

- August's year-over-year bookings increased +17.4%, down from +58.6% in July, while billings increased +12.5%, up from +7.4% in July. Sequentially, sales increased +1.8%, down from +2.1% in July. Japan's book-to-bill ratio dropped to 1.06, down from 1.45 in July.
- "Core consumer prices in Tokyo's central wards increased 1.8% YoY in August 2026, following a 1.7% rise in the previous month and exceeding expectation of 1.7%", according to Trading Economics. Also, "Japan's S&P Global Composite PMI activity index edged down to 52.5 in September 2026 from a final 53.5 in August, flash data showed. It was the weakest reading since May, with factory output falling to a three-month low, while services activity grew at a softer, modest pace."
- "Japan's domestic new vehicle market continued to grow in Aug 2026, with new registrations rising by 2.0% YOY to 307,374 units after an 8.3% decline to 301,219 units a year earlier, according to data released by the JAMA. Sales of passenger vehicles rose by 1.4% to 252,908 units, while truck sales increased by 3.9% to 53,232 units and sales of buses and coaches surged by over 92% to 1,234 units.
- "Exports in Japan stood at JPY 10,048.4 billion in Aug 2026, not far from a record high of JPY 11,511.8 billion in the previous month. During August, sales rose 19.3% YOY to JPY 10,048.4 billion, surpassing market consensus of 18.2%. Outbound shipments grew for the 12th month, lifted by robust demand for AI-related chips, despite risks from supply chain disruptions due to the Middle East conflict", according to Trading Economics.

China: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

China Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio

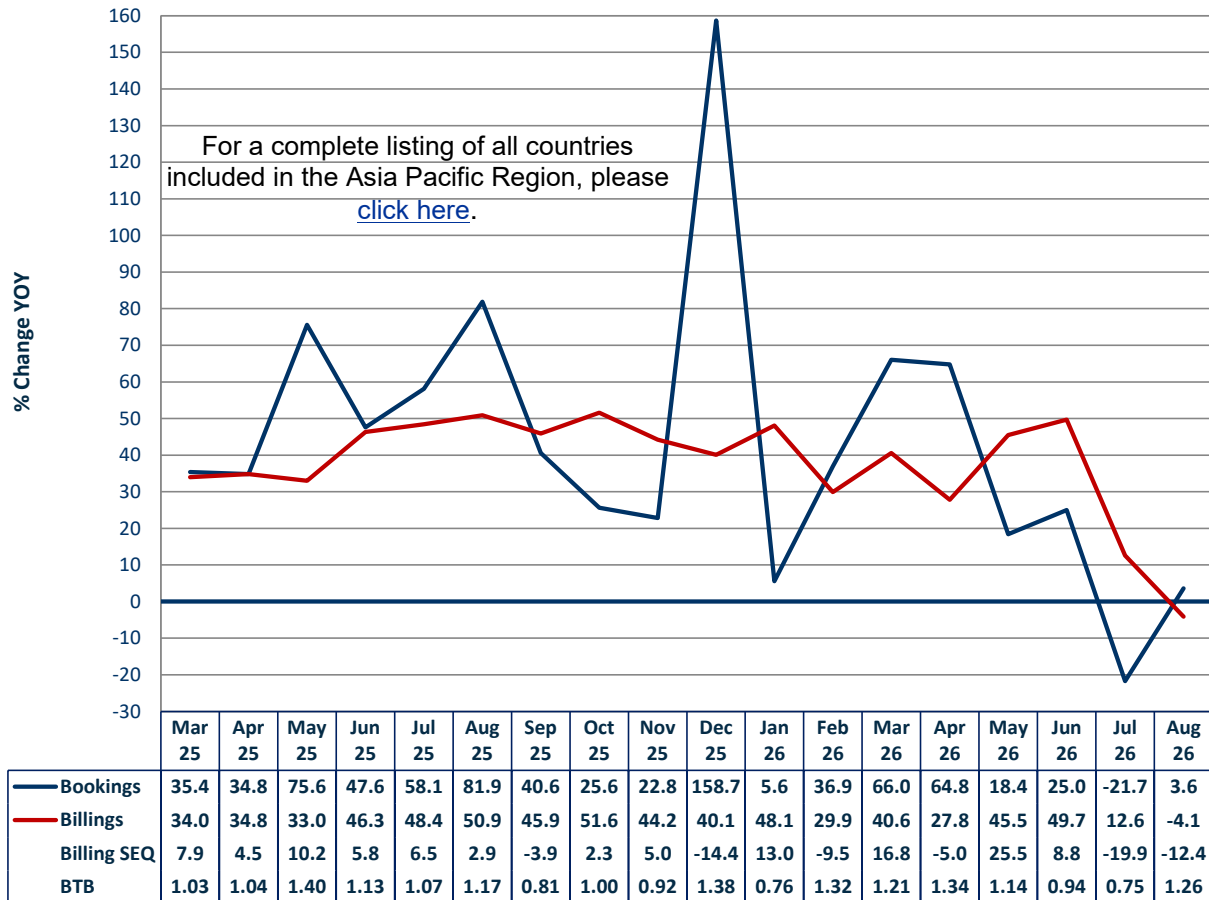


China Performance

- China's August sales grew +40.6% on a year-over-year basis. Bookings increased by +56.7% in August, while sequentially, sales increased by +6.8%. The book-to-bill decreased to 1.15, down from 1.25 in July.
- "China's annual inflation climbed to 0.8% in August 2026 from July's six-month low of 0.5%, in line with market estimates. Core inflation, excluding food and energy, rose 1.0% YOY, up from July's six-month low of 0.9%. On a monthly basis, consumer prices increased 0.4%, topping forecasts of a 0.3% gain and reversing a 0.1% drop in July. It also marked the highest monthly reading since February," according to National Bureau of Statistics of China
- "Global sales of Chinese-made vehicles, including exports, declined by 5.1% YOY to 2.712 million units in August 2026, after rising by 16% to 2.857 million units a year earlier, according to passenger car and commercial vehicle wholesale data compiled CAAM. Domestic sales plunged by 24% to 1.702 million units last month, after rising by 15% to 2.246 million units a year earlier, while exports surged by 65% to 1.010 million units from 611,000 units".
- "China's official PMI rose to 49.8 in Aug from 49.2 in July, beating market expectations of 49.7. The reading marked a 2nd consecutive month of contraction, although the paces eased amid a recovery in demand, while their surveyed urban unemployment rate rose to 5.3%," according to Trading Economics.

Asia Pacific: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.

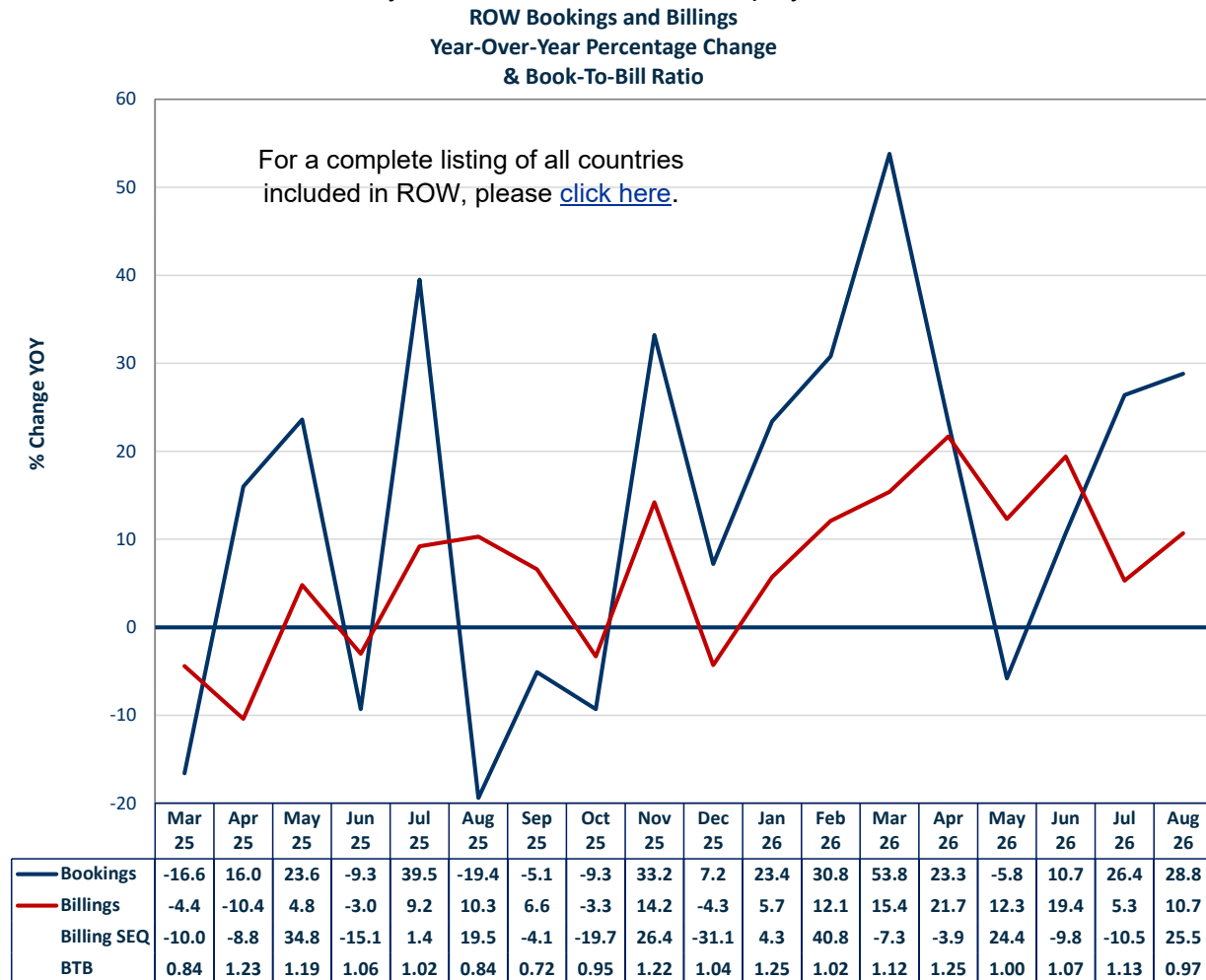
**Asia Pacific Bookings and Billings
Year-Over-Year Percentage Change
& Book-To-Bill Ratio**



Asia Pacific Performance

- Year-over-year, August orders increased +3.6%, up substantially from July's year-over-year decrease of -21.7%. Billings decreased by -4.1%, down from +12.6% in July. Sequentially, sales decreased by -12.4%, not as bad as July's decline of -19.9%. The book-to-bill ratio increased to 1.26 in August, a sharp increase when compared to July's BTB of 0.75.
- "India's wholesale prices increased 9.92% YOY in August 2026, accelerating slightly from a 9.78% rise in July and surpassing expectations of 9.89%. The acceleration was driven by faster increases in fuel, manufacturing, and food prices. India's HSBC Manufacturing PMI rose to 55.7 in September 2026 from 52.8 in August, marking the strongest improvement in the sector's health since February, preliminary estimates showed. Output and new orders grew at faster rates, with goods producers reporting stronger demand", according to Trading Economics.
- "Exports from South Korea surged 68.7% YOY to USD 98.25 billion in August 2026, surpassing market estimates of 62.6% and accelerating from an upwardly revised 63% jump in July. Exports rose for the 15th consecutive month, marking the third-highest monthly figure on record, after sales exceeded USD 100 billion for the first time in June", according to Trading Economics.

Rest of World: The following chart displays the year-over-year percentage change in bookings and billings for the last 18 months. The monthly book-to-bill ratio is also displayed.



Rest of World Performance

- Orders increased by +28.8% in August, outperforming July's strongest bookings since March of +26.4%. Billings increased by +10.7% year-over-year, up from +5.3% in July. Sequentially, sales increased by +25.5%. The book-to-bill ratio dropped to 0.97 from 1.13 in July.
- "Brazil's annual inflation rate eased to 4.22% in August 2026 from 4.44% in July, slightly below forecasts of 4.27% and moving further within the central bank's target range of 1.50%-4.50%", according to Trading Economics. In addition, "on a monthly basis, consumer prices declined 0.32%, following a marginal 0.1% increase in July. CPI has risen 3.11% year to date."
- "South Africa's seasonally adjusted Absa Purchasing Managers' Index (PMI) declined further in August, falling from 46.8 to 45.8 points. This marked the fourth consecutive month-on-month decline and the lowest reading so far this year, signaling a weak start to the second half of 2026," according to the Bureau for Economics Research. "South Africa's unemployment rate rose to 33.6% in second quarter of 2026 from 32.7% in the first quarter, the highest since the second quarter of 2022", as reported by Statistics South Africa.

Regional Summary Snapshot

The following table shows a snapshot of the performance of each region. The table displays the latest metric available, and the trend of the metric compared to prior months/quarters.

	North America	Europe	Japan	China	Asia Pacific	ROW
GDP Growth YOY	2.4% Steady	1.2% Steady	1.1% Down	4.3% Steady	N/A	N/A
Industrial Production Growth	1.4% Up	0.1% Steady	3.7% Down	5.2% Up	N/A	N/A
Manufacturing PMI*	53.9 Down	52.8 Up	54.9 Up	49.8 Up	N/A	N/A
Inflation Rate	3.4% Steady	3.2% Up	1.9% Steady	0.8% Up	N/A	N/A
Unemployment Rate	4.1% Steady	6.4% Up	2.4% Up	5.3% Up	N/A	N/A
Retail Sales Growth YOY	6.0% Up	0.6% Down	4.0% Up	0.4% Down	N/A	N/A
August Connector Sales	29.9%	19.1%	12.5%	40.6%	-4.1%	10.7%
YTD Connector Sales	25.1%	16.3%	6.1%	26.6%	29.8%	12.7%
August Connector Orders	110.7%	40.9%	17.4%	56.7%	3.6%	28.8%
YTD Connector Orders	60.2%	31.5%	21.1%	49.3%	22.2%	21.6%

* Purchasing Manager Index - Below 50 is contracting factory activity

Key Take Aways:

- YTD bookings were up in all regions in the double-digit range in August, with the greatest growth in North America at +60.2%, followed by China with YTD growth of +49.3%. From a billings perspective, year-over-year billings were up double-digits in all regions but Asia Pacific, where year-over-year billings declined -4.1%. Year-to-date, sales were up double-digits in all regions except Japan, where sales were up +6.1%.
- Unemployment continues to rise with rates up in all regions but North America where it has remained steady. This coupled with a rise in inflation in two out of the four regions, with the remaining two steady, and the fact retail sales growth has only increased in two of the four regions, helps to explain why GDP levels are not rising.

The Industry Backlog Is 15.3 Weeks

August 2026 was another excellent month for the connector industry. Orders totaled \$13,811 million, up +58.9% over the same period in 2025. Sales were \$10,758 million, up +23.9%.

The industry shipped \$2,560 million per week in August. Assuming the same weekly shipments, the industry has 15.3 weeks of backlog (ending backlog \$39,098 million divided by \$2,560 million).

Industry Backlog

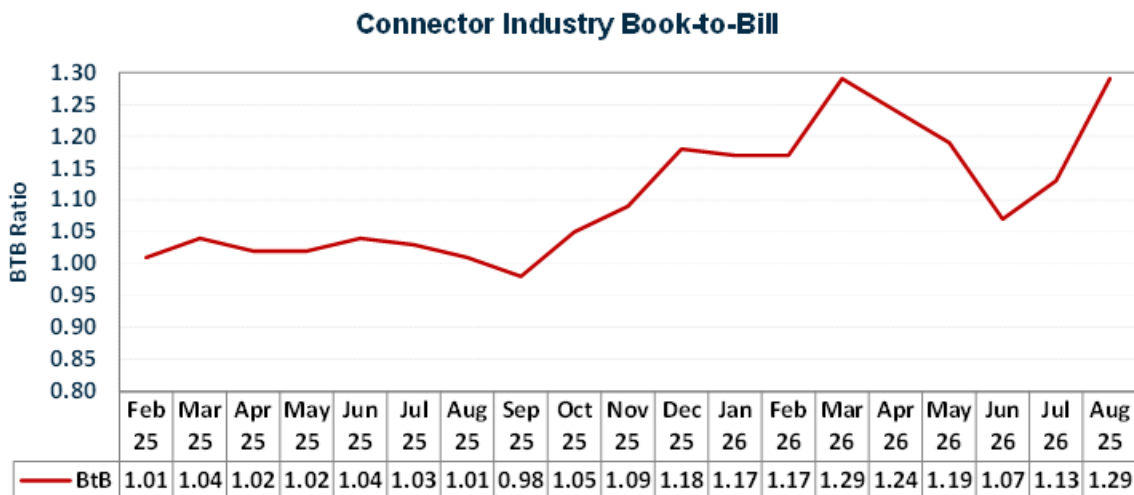
	Full Year 2025	August 2026
BtB Ratio	1.00	1.29
Beginning Backlog	\$21,287	\$24,067
YTD Bookings	\$101,868	\$92,813
YTD Billings	\$99,165	\$77,782
Ending Backlog	\$24,067	\$39,098
Backlog in Weeks	12.6	15.3

\$ Millions

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Connector demand continues to be very strong year-over-year. This marks 14 months in a row when orders achieved double-digit growth. Connector backlog has increased \$15.0 billion since the end of 2025. The backlog increased \$3.1 billion in August alone.

The following chart shows the book-to-bill ratio (BtB) for the last 18 months. You will note that during that time frame, the book-to-bill ratio has been over 1.00 18 out of the 20 months.



Demand for connectors is the highest in industry history.

Connector Sales & Order Trends

Connector orders have displayed a double-digit increase for 15 consecutive months. Sales have shown a double-digit increase for the last 17 consecutive months. We are in a historical period of time for connector demand.

2025 Orders and Sales Growth in 2025 by Month Percentage Change

Month	Orders	Sales
January	7.3%	2.3%
February	5.5%	7.9%
March	12.6%	7.2%
April	11.6%	11.4%
May	9.6%	16.5%
June	15.6%	17.1%
July	32.0%	18.4%
August	16.6%	16.2%
September	21.6%	21.6%
October	21.4%	17.4%
November	29.2%	19.8%
December	30.1%	19.7%
Year-to-Date	17.6%	14.7%

2026 Orders and Sales Growth in 2026 by Month Percentage Change

Month	Orders	Sales
January	34.7%	21.8%
February	33.2%	14.9%
March	50.2%	21.0%
April	47.6%	21.4%
May	37.8%	17.6%
June	36.9%	32.8%
July	38.7%	26.8%
August	58.9%	23.9%
September		
October		
November		
December		
Year-to-Date	42.4%	22.6%

Note: The numbers may vary slightly from those previously published by Bishop Reports because of adjustments from participating companies.

Connector demand is strong. We have recorded 29 consecutive months of growth in both orders and sales, allowing us to continue to believe 2026 will be a good year for the connector industry!

Connector orders are up +42.4% through August 2026. This sets a record for the connector industry.

2026 Outlook: Historical Analysis

The industry has shipped \$77,782 million through August 2026. That is a +22.6% increase over the same period in 2025.

Over the past 16 years, 2008 – 2025, August sales averaged 8.8% of full year sales. Assuming history repeats, the industry will ship \$122,250 million in 2026. That is growth of +23.4%.

If we annualized year-to-date August sales, the full year would result in +17.7% growth.

This provides us with a range of possible sales outcomes in 2026.

2026 Possible Outcomes

Methodology	YTD Aug Sales	Divide By	Full Year 2026 Sales	Growth
Annualized	\$77,782	0.667%	\$116,615	17.7%
Historical August	\$77,782	0.880%	\$122,250	23.4%

\$ Millions

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Year-to-date sales through August are up 22.6%. We believe 4Q2026 sales will soften modestly. So the Bishop forecast is growth of +20.1%.

Currency Fluctuations Reduce Performance between USD and Local Currency

The dollar consistently fluctuates against the euro, the yen, and the yuan. The following table measures the impact for August 2025 versus August 2026 and shows results for these three currencies.

**Change in Local Currency to One USD
2025 YTD versus 2026 YTD**

Currency	2025	2026	% Change
Euro	0.8586	0.8629	-0.5%
Yuan	7.1761	6.7382	6.5%
Yen	147.5068	158.7979	-7.1%

Europe, China, and Japan account for approximately 60% of world connector sales. Currency fluctuation against the US dollar can have a significant impact on our reporting of sales performance in US dollars.

The following table shows August YOY performance by region in US dollars and local currencies.

**Industry Sales Performance
August 2026
USD-vs-Local Currencies**

Region	U.S.\$	Local Currency
North America	29.9%	29.9%
Europe	19.1%	10.5%
Japan	12.5%	2.6%
China	40.6%	40.2%
Asia Pacific	-4.1%	-4.1%
ROW	10.7%	10.7%
World	23.9%	21.2%

Connector sales in August of 2026 increased +21.2% when measured in local currencies, versus an increase of +23.9% in US dollars.

Significant Events

August 2026 News

Hon Hai Reports Strongest August Sales on Record

Hon Hai Precision Industry Co reported its strongest-ever August sales.

Hon Hai, also known as Foxconn Technology Group, posted NT\$921.77 billion (US\$29.14 billion) in sales last month, up 51.98 percent from a year earlier, data released by the iPhone assembler and artificial intelligence (AI) server maker showed.

Last month's sales were the second highest for any single month in Hon Hai's history, behind NT\$946.51 billion in July, the data indicated.

Hon Hai said its cloud and networking division enjoyed significant year-on-year revenue growth amid accelerating AI momentum, while its smart consumer electronics division saw sales growing significantly as clients rebuilt inventories for the upcoming debut of new products and as shipment prices moved higher.

The company said that its electronics component and computing product divisions reported strong year-on-year growth.

On a month-on-month basis, Hon Hai said its cloud and networking and electronics component divisions posted significant growth last month, while the smart consumer electronics and computing product divisions bucked the upturn, reporting a sales decline.

In the first eight months of this year, Hon Hai's consolidated sales stood at NT\$6.51 trillion, up 39.73 percent from a year earlier, it said.

As the third quarter is a traditional peak season for the information and communications technology industry, the company expects sales growth momentum to continue, it added.

Separately, Largan Precision Co, a supplier of smartphone camera lenses to Apple Inc, said its sales hit NT\$5.01 billion last month, down 16 percent from a year earlier, but up 3 percent from a month earlier.

During the January-August period, Largan said its consolidated sales rose 4 percent from a year earlier, adding that traditional peak effects are expected to allow the company to report an increase in sales this month, with clients building up inventories to meet needs for the debut of new products.

PC Shipments are Falling, But Manufacturers are Making More Money Selling Pricier AI PCs

IDC expects average PC prices to jump 20% while shipments continue to decline

Bottom line: PC makers are selling more expensive machines into a market with fewer available units, as tight memory supplies reshape product mix, pricing, and demand for AI-capable systems. That shift is helping manufacturers preserve – and in some cases expand – revenue even as global shipments decline, but it is also pushing the industry further away from the low-cost devices that once drove volume growth.

The pressure is originating in the AI infrastructure market, where demand for memory chips has driven up component costs and limited supply for other hardware categories.

The near-term winners are likely to be vendors with strong commercial exposure and premium AI offerings, while consumers and budget-conscious buyers face higher prices with little prospect of quick relief.

PC vendors have responded by concentrating production on higher-priced devices, particularly systems designed to run AI workloads locally. The strategy is reducing shipment volumes but, so far, generating higher revenue.

International Data Corporation reported that worldwide PC shipments fell 4.9% in the second quarter. The research firm expects average PC prices to rise 20% this year, followed by more modest increases in 2027, even as unit shipments continue to decline.

The results are already visible in quarterly earnings. HP said its personal systems segment, which includes its PC business, increased revenue 18% in the second quarter even as unit sales fell 16%. Dell's client solutions group posted a 20% revenue increase in its most recent quarter, while Lenovo reported nearly 30% revenue growth in PCs and smart devices.

Top 5 Companies, Worldwide Traditional PC Shipments, Market Share, and Year-Over-Year Growth, Q2 2026 (Preliminary results, shipments are in millions of units)

Company	2Q26 Shipments	2Q26 Market Share	2Q25 Shipments	2Q25 Market Share	2Q26/2Q25 Growth
1. Lenovo	16.6	24.4%	17.0	23.7%	-2.1%
2. HP Inc	13.0	19.1%	14.3	19.9%	-9.0%
3. Dell Technologies	9.3	13.6%	9.8	13.6%	-5.0%
4. Apple	6.7	9.9%	6.1	8.5%	10.1%
5. ASUS	5.0	7.4%	5.0	7.0%	0.2%
Others	17.5	25.7%	19.6	27.3%	-10.5%
Total	68.2	100.0%	71.7	100.0%	-4.9%

Source: IDC Quarterly Personal Computing Device Tracker, July 8, 2026

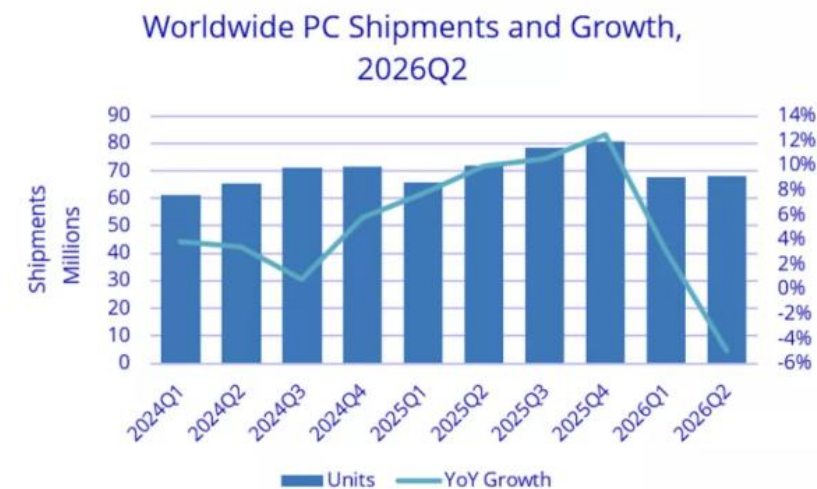
That performance reflects a deliberate shift away from entry-level machines. With memory both expensive and scarce, vendors are allocating more components to premium systems, where higher selling prices can better absorb cost inflation and protect margins.

AI PCs are central to that shift. The term generally refers to systems equipped to handle certain AI processing on the device rather than relying entirely on cloud infrastructure. Such machines typically combine newer

CPUs, GPUs, or dedicated neural-processing units with larger memory configurations – features that can increase both component requirements and retail prices.

Manufacturers are positioning those capabilities as a reason for businesses and consumers to accept higher prices. HP Chief Financial Officer Karen Parkhill said the company has increased the share of AI PCs in its shipments and expects the category to expand further. "We're proud to have an increased penetration of AI PCs today as part of our shipments," she told analysts, adding that the segment will be "a growing part as we look ahead."

Commercial customers may provide the strongest support for the market. UBS analyst David Vogt said business demand accounts for roughly 75% of PC market volume and should be relatively resilient, particularly as enterprises evaluate on-premises AI systems for sensitive or complicated workloads. That is especially relevant in regulated industries, where organizations may want tighter control over data and AI processing.



Source: IDC 2026

Worldwide Server Market Revenue Hits Record \$166.3 Billion in the Second Quarter of 2026 as AI Infrastructure Investment Continues to Broaden

The worldwide server market reached a record \$166.3 billion in vendor revenue in the second quarter of 2026 — the highest quarterly total in the history of IDC's *Worldwide Quarterly Server Tracker*, surpassing the previous high of \$125.3 billion set in the fourth quarter of 2025. The result marks a 52.0% year-over-year increase and a 35.7% sequential gain. AI infrastructure investment remained the dominant driver of market growth, with this quarter's gain reflecting both a resumption of unit shipment growth and continued increases in average selling prices across accelerated and non-accelerated systems alike.

Two distinct dynamics are shaping the market. First, AI infrastructure investment from hyperscalers and large cloud providers continues to broaden across regions and use cases, with no signs of a pullback. Second, worldwide unit shipments grew 15.4% year-over-year alongside revenue growth of 52.0%, as a resumption in shipment volume combined with elevated memory pricing and continued component allocation, which pushed average selling prices higher across GPU-accelerated and non-accelerated systems alike. According

to IDC, both incremental unit volume and price/mix are now contributing to near-term server market growth, with average selling prices continuing to climb even as shipment volumes recover.

- A record \$166.3 billion in vendor revenue in 2Q26, the highest quarterly total in tracker history, reflecting 52.0% year-over-year growth from \$109.4 billion in 2Q25.
- Non-x86 servers reached \$74.4 billion, up 146.0% YoY, now representing 44.8% of total market revenue, closing in further on x86's share.
- x86 server revenue reached \$91.9 billion, up 16.1% YoY, even as non-x86 platforms captured a faster-growing share of AI-driven deployments.
- GPU-accelerated servers generated \$87.4 billion (+28.1% YoY), representing 52.6% of total market revenue. Other Accelerated servers surged 237.6% YoY to \$27.5 billion.
- Worldwide server unit shipments grew 15.4% year-over-year, alongside revenue growth of 52.0%, confirming that this quarter's growth was driven by both a resumption in shipment volume and continued increases in average selling prices.
- ODM Direct revenue share compressed further from 60.6% in 2Q25 to 53.9% in 2Q26, as branded OEM vendors continued to capture a growing share of AI infrastructure deployments; ODM Direct revenue itself grew 35.2% YoY, trailing the broader market.
- Top three fastest-growing regions: Canada (+202.6%), Central & Eastern Europe (+98.3%), and Middle East & Africa (+68.8% YoY).

The 2Q26 results confirm that AI infrastructure investment remains a durable, global, multi-sector phenomenon. Hyperscalers and large cloud service providers continued to commit substantial capital expenditure to GPU-optimized infrastructure, while AI infrastructure adoption continued to broaden beyond the largest public clouds into enterprise and government-directed deployments across a growing number of countries, a policy-and capex-driven demand layer that remains largely insulated from near-term commercial budget cycles.

The defining story of the quarter, however, is what happened to pricing. Average selling prices for GPU-accelerated servers rose from roughly \$118,600 to nearly \$170,200 (+43.6% YoY), even as GPU unit shipments fell 10.8% year over year. In the non-accelerated segment, average selling prices climbed from roughly \$9,800 to nearly \$13,000 (+33.5% YoY) alongside a 16.7% increase in units, underscoring that both price and volume are contributing to growth in that segment.

Vendors continue to cite DRAM and NAND flash pricing, along with component allocation, as the principal driver of these increases. IDC views this as a continuation of the supply-constrained environment first flagged in 1Q26, as buyers are increasingly securing components and finished systems further in advance to guard against further price inflation and allocation risk, a pattern consistent with inventory buildup ahead of anticipated component shortages rather than a change in underlying demand. That constraint is beginning to extend beyond components to the data centers themselves, with the pace of AI deployments increasingly gated by power availability, cooling, and facility readiness in addition to chip and memory supply.

Server Regional Market Results

The United States remained the dominant market, generating \$112.2 billion (+54.9% YoY), representing 67.4% of global revenue. PRC reached \$26.4 billion (+43.4% YoY), reaccelerating from recent quarters. APeJC grew 31.5% to \$10.9 billion, while Western Europe grew 62.7% to \$9.1 billion and Central & Eastern Europe grew 98.3% to \$0.7 billion off a small base. Canada (+202.6%) was again the fastest-growing region worldwide, followed by Middle East & Africa (+68.8%) and Latin America (+32.8%), underscoring the increasingly global distribution of AI-driven server demand. Japan grew a modest 11.1% YoY.

Overall Server Market Standings, by Company

Branded OEM vendors extended their broad-based share gains against ODM Direct for a second consecutive quarter, led by Dell Technologies, which extended its exceptional run to retain the top position with a 13.4% revenue share and 165.4% YoY growth, again the fastest growth among the top five vendors, driven by continued record AI server orders. Supermicro held second place with 6.1% revenue share, growing 97.2% YoY. Lenovo retained third position with 5.1% share and 99.6% growth, while Hewlett Packard Enterprise ranked fourth with 3.5% share (+46.0% YoY) and IEIT Systems rounded out the top five with 2.4% share (-8.1% YoY). ODM Direct retained its dominant absolute position at \$89.7 billion, and its revenue grew 35.2% YoY, though its share compressed further, from 60.6% in 2Q25 to 53.9% in 2Q26 — as branded OEM vendors grew even faster and continued to capture a growing share of AI infrastructure deployments.

Company	2Q26 Revenue	2Q26 Share	2Q25 Revenue	2Q25 Share	YoY Growth
1. Dell Technologies	\$22,240.6M	13.4%	\$8,381.2M	7.7%	+165.4%
2. Supermicro	\$10,177.0M	6.1%	\$5,159.9M	4.7%	+97.2%
3. Lenovo	\$8,411.3M	5.1%	\$4,214.3M	3.9%	+99.6%
4. Hewlett Packard Enterprise	\$5,868.4M	3.5%	\$4,018.4M	3.7%	+46.0%
5. IEIT Systems	\$4,001.5M	2.4%	\$4,356.0M	4.0%	-8.1%
ODM Direct	\$89,660.3M	53.9%	\$66,328.4M	60.6%	+35.2%
Rest of Market	\$25,960.1M	15.6%	\$16,928.7M	15.5%	+53.4%
Total	\$166,319.2 M	100.0%	\$109,386.8 M	100.0%	+52.0%

*Top 5 Companies — Worldwide Server Market, 2Q26 (Vendor Revenue in US\$ millions);
Source: IDC Worldwide Quarterly Server Tracker, September 10, 2026*

Worldwide External Enterprise Storage Systems Market Grows 33.6% in the Second Quarter of 2026, Extending Its Strongest Growth Run in Years

The worldwide external OEM enterprise storage systems (ESS) market continued its sharp acceleration in the second quarter of 2026, reaching \$10.3 billion in vendor revenue, a 33.6% year-over-year increase, according to IDC's Worldwide Quarterly Enterprise Storage Systems Tracker. It represents the second-highest quarterly total in the tracker's history, trailing only Q4 2025, and the highest revenue ever recorded outside a fourth-quarter period. ESS growth accelerated further from the 28.7% rate posted in the first quarter of 2026, marking a second consecutive quarter of acceleration after the market's 3.9% full-year 2025 growth rate.

AI Deployment Demands

The deferred refresh cycle that took a back seat to server and AI infrastructure spending in 2024-2025 is now flowing through in force, particularly in high-end segments where refresh economics are most acute. High-end storage (systems priced above \$250K) surged 90.6% year over year in 2Q26, an acceleration from the 60.7% growth recorded in 1Q26. This represents the sharpest segment acceleration in the market. The combination of pricing-driven and refresh-driven demand is expected to sustain above-historical-average growth rates through the remainder of 2026, even as volume growth remains constrained by supply availability.

Storage also remains central to enterprise AI deployment. All-flash platforms built for GPU-to-storage bandwidth requirements in AI training and inferencing remain among the fastest-growing product categories IDC tracks, with demand increasingly extending beyond GPU-server-attached capacity into unstructured and multimodal data activation use cases. Subscription and as-a-service storage models continue to gain traction for AI infrastructure buildouts, even as capital purchases of owned hardware grow faster in the current upcycle.

External Storage Regional Market Results

Regional performance in 2Q26 was broadly positive, with all nine tracked regions posting year-over-year revenue growth. The United States remained the dominant market, generating \$3.6 billion (+26.8% YoY) and representing 35.3% of global ESS revenue. Canada was the fastest-growing region at +77.2% YoY (\$239.6 million), followed by APeJC (+73.1% YoY, \$1.1 billion) and Central & Eastern Europe (+54.1% YoY, \$240.4 million). Latin America (+48.0%) and Middle East & Africa (+35.1%) also posted strong gains. Western Europe grew 42.8% YoY to \$1.9 billion, remaining the second-largest region worldwide. PRC grew 20.7% YoY to \$2.2 billion, while Japan posted the market's slowest growth at +12.9% YoY (\$302.6 million).

Overall External Storage Market Standings, by Company

Dell Technologies retained the top position in 2Q26, with a 23.8% revenue share and 42.5% YoY growth, extending the more than 3-point year-over-year share gain it posted in 1Q26 on the strength of its broad portfolio and AI storage attach strategy. Huawei moved into second place with an 11.3% share, up 29.4% YoY. NetApp held third position with a 9.6% share and 35.7% YoY growth, underpinned by its growing all-flash business. Everpure placed fourth with 8.1% share but posted the fastest growth of any top five vendor at +50.0% YoY, driven by continued subscription model adoption and AI-optimized platforms. Hewlett Packard Enterprise rounded out the top five with a 6.8% share and 31.9% growth.

Gartner Forecasts Worldwide AI Spending to Grow 49.5% in 2026

Worldwide spending on **AI** is forecast to total \$2.7 trillion in 2026, a 49.5% increase year-over-year, according to Gartner, Inc., a business and technology insights company.

“Demand for AI infrastructure (including AI-optimized IaaS, AI-optimized servers, AI network fabric, AI processing semiconductors and devices) to support anticipated future workloads remains strong and inelastic to pressures from memory-related pricing increases,” said **John-David Lovelock**, Distinguished VP Analyst at Gartner. “The buildout of AI data center capacity is the largest infrastructure project humanity has even undertaken. The capacity growth from hyperscalers and service providers purchasing AI-optimized servers will continue to be the largest single area of spending.”

In the software market, vendors across different software types are rapidly embedding agentic AI within their existing products to maintain relevance in the market and defend against new cross-functional agents (see Table 1). With **GenAI** firmly in the **Trough of Disillusionment** in 2026, enterprises are using these simpler embedded AI features from their incumbent software providers to grow operational efficiency and automate workflows, improve customer engagement and enhance decision making.

Table 1: Worldwide AI Spending by Market, 2025-2027 (Millions of U.S. Dollars)

Market	2025	2026	2027
AI Services	434,046	576,481	745,655
AI Cybersecurity	25,920	51,347	85,997
AI Software	288,168	461,637	656,353
AI Agents and Assistants	16,481	29,219	65,472
Generative AI Models	13,021	28,266	51,620
AI Platforms for Data Science and Machine Learning	19,405	26,445	35,552
AI Application Development Platforms	6,885	9,541	12,478
AI Data	826	3,126	6,480
AI Infrastructure	981,920	1,484,397	1,977,685
Total AI Spending	1,786,671	2,670,460	3,637,292

Source: Gartner (September 2026)

Near-Term Outlook Changes

The short-term outlook for AI application development platforms has increased from 28% growth in 2026 in the **previous forecast** to 39% in this quarter's forecast, as enterprises, software providers and services firms seek to develop custom AI applications tailored to their individual needs. Enterprises are looking to their providers to help them manage their costs and embed usage tracking into their workflows to evaluate success. For model providers, the pressure to offer more cost-efficient models that are aligned to enterprise use cases is opening a small but growing opportunity for domain-specific language models (DSLMS). As a result, the 2026 growth rate for generative AI models has increased from 110% growth in the previous forecast to 117% growth in the current forecast.

Long-Term Outlook Changes

In the current forecast, Gartner has separated cross-functional agents and assistants from AI software and added consumer agents and assistants into the AI spending forecast to better show the emerging opportunity in this area.

2026 Analysis of the World's Top 100 Electronic Connector Manufacturers

Report No: M-121-26
August 2026



Bishop & Associates has just released a new ten-chapter research report providing a comprehensive analysis of the world's Top 100 Electronic Connector Manufacturers. This new report furnishes detailed statistics that benchmark the leading connector manufacturers by 2024/2025 total sales, sales by end-use equipment market, sales by product category, and sales by region. All manufacturers are exhibited by 2025 sales and are ranked by region of the world with percentage year-to-year change. This report provides all the key data needed to analyze the sales performance of each of the top 100 worldwide electronic connector suppliers.

The world's top 100 connector manufacturers recorded shipments of \$81.386 billion in 2025. This represented 82.1% of the worldwide connector market, up from 81.0% in 2024. The balance of the connector industry had shipments of \$17.783 billion in 2025 and represented 17.9% of the total market.

Over the last two decades, we have identified more than 750 connector manufacturers, many of whom have been acquired by larger companies or consolidated to form new connector companies. In fact, if you were to review the list of top 100 connector companies in 2000 with the list of top 100 connector companies in 2025, you would see that a large percentage of the companies listed in 2000 were acquired by other companies. In fact, in just the last several years, names like AirBorn, CONEC, ERNI, Positronic, Carlisle Interconnect, and Winchester, all at one time, top 100 place holders have been acquired. It doesn't appear this consolidation will end anytime soon either. This will be the last year that CommScope #19, Smiths Interconnect #35, or Omnetics #90 will be represented as standalone companies, as all have been acquired by other top 100 companies.

These consolidations not only allow new companies to join the elite list of top 100 connector manufacturers, but they also allow us to see the change in market sector penetration and product type expansion these companies have brought to the marketplace. It allows Bishop to provide their customers with a consolidated list of companies, and the products and markets sectors they focus on, all great information when someone is seeking the best company to support their requirements.

With so many connector companies, finding the right one is not always an easy task. Allow us to make that job much easier. Obtain your own copy of the Top 100 Connector Manufacturers and evaluate and explore the 100 connector companies that make up over 80% of the connector manufacturing industry. For additional information on how to obtain a copy of this report, or to obtain a sample, please click [here](#).

The table on the following page shows percent of sales for the top 100 connector manufacturers, and all other connector manufacturers by geographic region.

Top 100 by Geographic Region - 2025 Sales

Region	1 - 100 Sales	All Other Sales	Total World
North America	XX.X%	X.X%	XX.X%
Europe	XX.X%	X.X%	XX.X%
Japan	3.7%	0.4%	4.2%
China	XX.X%	X.X%	XX.X%
Asia Pacific	XX.X%	X.X%	XX.X%
ROW	2.2%	1.3%	3.5%
Total World	82.1%	17.9%	100.0%

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