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Editor's Word



SWOT a year

This time every year I finish reading the ECIA TOP 50 Americas Authorized Distributors Report and wonder two things to myself. Firstly, how closely does the report match my own experience and expectations? Secondly—mostly for fun—I wonder what the following year's big news will be? I can safely say, 12 months ago, a reset of global tariffs was not on my list of options.

If I run an appraisal of past years in the form of a quick SWOT analysis, the list of threats that came to fruition is truly mind blowing. It includes the dot.com bubble, global financial crisis, multiple natural disasters, a global pandemic, war in Europe, tariffs, port closures and the odd container vessel blocking key shipping channels.

These are all events one would place in the 'threats' quadrant but never imagine would happen. Yet, they did and continue to do so. Now add in the 'weaknesses' quadrant and it's amazing anything gets made at all.

Yet, every day, against all the odds, the global manufacturing industry is hard at work, pulling people out of poverty, improving living standards the world over, introducing lifesaving technologies and pushing humanity on to better things.

So, what makes all this possible? People, that's what. Hardworking, ingenious, problem solving, thought provoking, down-to-earth people who—when faced with the 'threats quadrant'—knuckle down, design a solution and crack on.

Just such people are featured in this magazine, from cover-to-cover, so read on to hear about their thoughts on the future.

Jon Barrett

Contact

EDITORIAL

Managing Editor: Jon Barrett
jonb@electronics-sourcing.com
Contributing Editor: Amy Barker
amyb@electronics-sourcing.com

ADVERTISING

Advertisement Manager: Will Leary
will@mmgpublishing.com

PRODUCTION & DESIGN

Production Manager: Jo McCarthy
jo.mccarthy@mmgpublishing.com
Production Co-Ordinator: Tom Claydon-Smith
tom.claydonsmith@mmgpublishing.com

ELECTRONICS SOURCING **mmg**
PUBLISHING

CIRCULATION

Data & Software Analyst: Thomas Smart
thomas.smart@mmgpublishing.com

PUBLISHER

Mark Leary
mark.leary@electronics-sourcing.com
Director of Operations: Denise Pattenden
denise.pattenden@mmgpublishing.com

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2024 hits distributors
with sales drop of -9.3%

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Turbulent times and tariffs



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NEWS

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Buy and learn

DigiKey is now stocking Real Digital educational boards which are designed to help the next generation of engineers gain knowledge and experience. The company's AMD field-programmable gate array (FPGA) boards are a popular tool used for engineering students to learn everything from Boolean Logic to real-time operating systems.

DigiKey's global business development director—academics, YC Wang, said: "Adding Real Digital's educational boards to the DigiKey Marketplace is just one way we are proud to support the next generation of engineers. Empowering future

engineers by nurturing curiosity, encouraging innovative thinking and enhancing skills starts with easy-to-access components and digital solutions we are pleased to offer."

Real Digital's founder and CEO, Clint Cole, added: "Getting our FPGA boards into the hands of students and educators in a timely manner is paramount to our mission at Real Digital. DigiKey is an ideal partner to help us deliver exceptional education materials to future engineers."

www.digikey.com

Power resistor partnership

Arrow Electronics and Ohmite have established a distribution agreement that will expand the reach of Ohmite's power resistor solutions to Arrow's global customer base. This arrangement will enable customers to purchase Ohmite's components through Arrow.



Ohmite manufactures power resistors for industries including transportation, industrial, energy and aerospace. The portfolio includes high power, high voltage, current sense, and surge resistors.

Arrow Electronics' senior vice president of global supplier management, Aiden Mitchell, said: "This new arrangement with Ohmite is consistent with our commitment to offering a comprehensive range of electronic components to our customers."

Ohmite's CEO, Greg Pace, added: "As Ohmite is in its 100th year, we continue to grow and extend our reach globally by working with Arrow Electronics. The addition of Arrow Electronics to our distribution channel completes a very nice reorganization focusing on the new products we manufacture, the legacy products we are famous for and our custom solution capabilities."

www.arrow.com

Pressing for domestic manufacturing strategy

IPC senior director of North American government affairs, Richard Cappetto, has shared the following statement on US tariffs and their implications on the global electronics industry.

For decades, IPC has worked to restore US leadership in electronics manufacturing, urging the government to recognize its strategic importance and invest in rebuilding critical domestic capabilities. We welcome President Trump's commitment to strengthening American manufacturing.

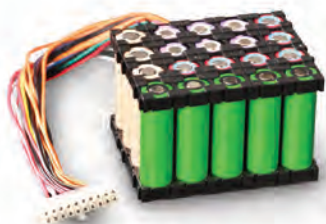
Tariffs will not achieve this goal. A strong US electronics industry requires a comprehensive approach, pairing targeted investments and incentives with policies that enhance mutually beneficial trade partnerships. Trade is essential to supply chain resilience, innovation and cost competitiveness. Without it, tariffs risk raising costs for American businesses and further driving production offshore.

IPC is eager to work with President Trump, his administration and Congress on policies that profoundly strengthen US electronics manufacturing. We urge a collaborative strategy that fosters domestic growth while maintaining global connections critical to long-term competitiveness.

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IN BRIEF

AI power supply search

Bel Fuse has launched a new website for its portfolio of power supplies and components. The site consolidates Bel's power products into one convenient location, while enhancing functionality, improving user experience and providing efficient access to the product catalog. The site features an AI-powered parametric search function. www.belfuse.com

Boosting data center cooling

XNRGY Climate Systems has opened its new manufacturing facility within the Gateway East development in Mesa, Arizona. The 275,000ft² facility highlights XNRGY's commitment to supporting the booming data center market and driving technological advancements in thermal management. The expansion will significantly increase production capacity, letting the company meet growing demand. www.xnrgy.com

US production strategy

Fortec Group enables European companies with US customers to optimize their production chains. By combining local manufacturing in the United States with the strategic pre-assembly of electronic components in Egypt, the company, together with its subsidiaries, provides a cost-effective pathway for the electronics industry to supply the US market. www.fortec-integrated.de

PMIC for performance computing

Microchip Technology has announced the MCP16701, a power management integrated circuit (PMIC) designed to meet the needs of high-performance MPU and FPGA designers. The device integrates eight 1.5A buck converters that can be paralleled, four 300 mA internal low dropout voltage regulators (LDOs) and a controller to drive external MOSFETs. www.microchipdirect.com

New source for RF miniature modules

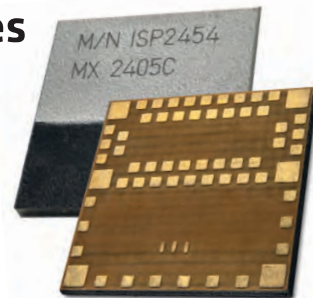
Insight SIP's sales and marketing director, Nick Wood, said: "We are proud to have signed an agreement with a fast-growing distributor in Master Electronics. We believe this will boost our business particularly in North America but also worldwide."

Master Electronics' supplier manager, Amy Cooper, added: "We are delighted to have Insight SIP as a new line at Master Electronics. Their leading-edge RF miniature modules for IOT applications are the kind of components for which we see a strong and growing demand, as more and more functions are carried out wirelessly."

Master Electronics is a global distributor with strength in the North American market

and the capability to ship worldwide to support global manufacturing. It operates under the Master Electronics brand within the US, Online Components for its web based global distribution, and Electro Sonic in Canada. It operates with a combined online e-commerce/field sales approach and its problem-solving programs are designed to provide solutions.

www.masterelectronics.com



Delivering Bluetooth LE 5.4 modules for embedded applications

Mouser Electronics is now shipping Silicon Labs' new SiWx917Y wireless modules, designed to provide



ultra-low-power Wi-Fi 6, Bluetooth Low Energy (LE) 5.4 and Matter connectivity for embedded, battery-powered IoT devices in smart homes, consumer, industrial and healthcare applications.

The products are integrated, shielded modules with a dedicated wireless processing subsystem, application processing subsystem (MCU) and security engine. Peripherals are framed by an intelligent power management subsystem that includes an antenna (or RF-pin) and worldwide RF regulatory certifications, simplifying development and certification processes.

The processing subsystem comprises a: network wireless processor (160 MHz); baseband digital signal processing; analog front end; 2.4 GHz RF transceiver; and power amplifier.

The modules come with modular radio-type approvals for various countries, including the US (FCC), Canada (IC/ISED) and Japan (MIC), and follow the relevant EN standards (including EN 300 328 v2.2.2) for conformity with directives and regulations in EU and UK.

www.mouser.com

Save development and certification costs

Rutronik is now stocking Telit Cinterion's CMB100 series LTE-based IoT products for industry. The modules let developers benefit from reduced development and certification costs, plus shorter time-to-market thanks to pre-certification. The components also minimize the gap between prototyping and production.



Features include an extended operating temperature range of -30 to 75°C, firmware-over-the-air (FOTA), 2G/3G fallback and GNSS. As 3GPP Release 10 platforms, they suit IIoT applications. Potential applications include: metering, sensing, tracking, monitoring, alarms, surveillance systems, enterprise, broadband, critical and industrial.

The series features a unified design to support current and future LTE and 5G technologies from Telit Cinterion, simplifying the integration of commercial and industrial devices. In addition, the modules eliminate the complexity and challenges of radio frequency (RF) applications, which positively impacts development times.

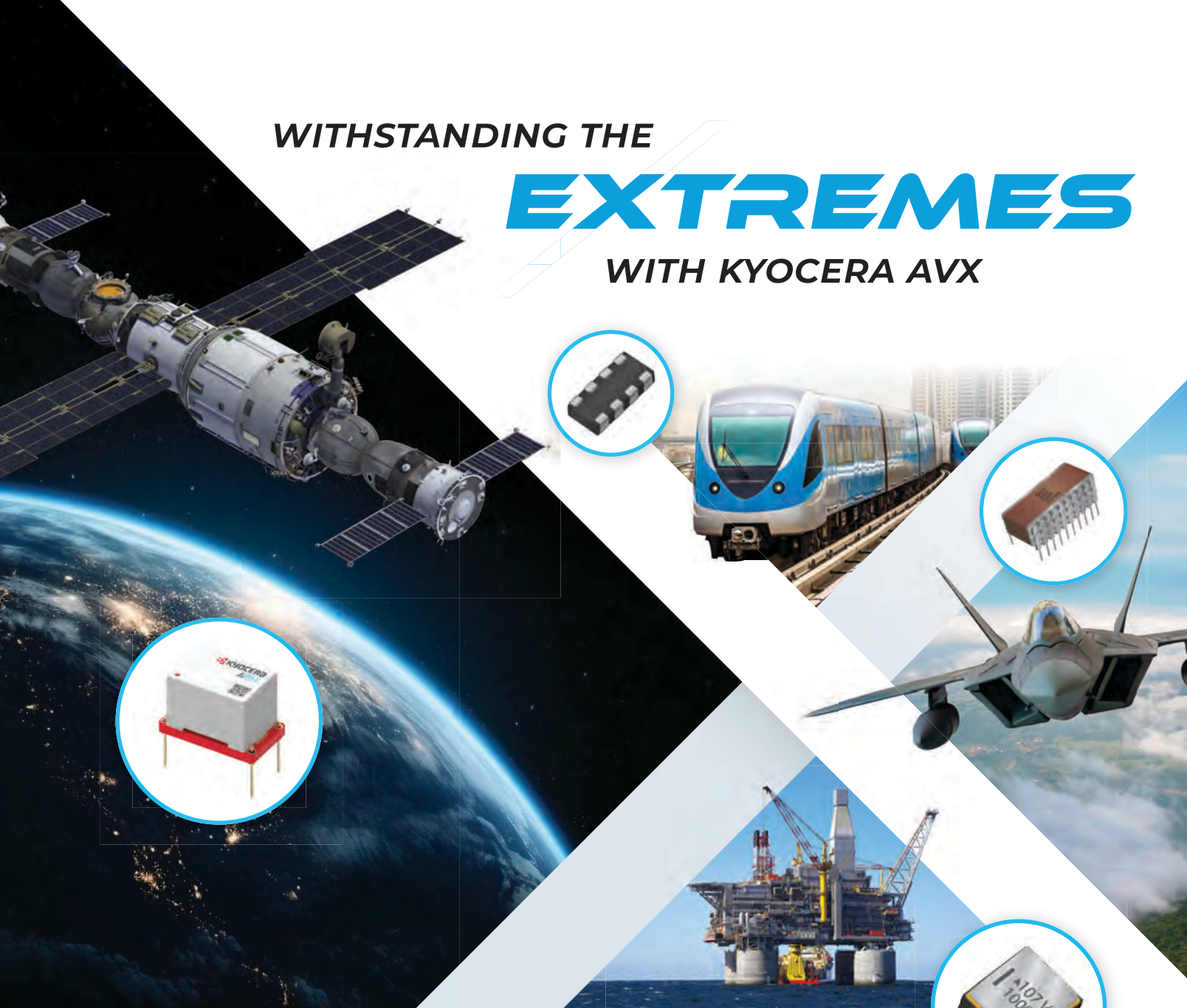
The integrated MikroBUS interface allows seamless connection to over 1,500 Mikro Click Boards and supports a wide range of I/O, sensors, wireless modules and control technologies.

www.rutronik24.com

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Distribution dazzle with Edge AI design offerings at EW 2025

The recent *Embedded World Exhibition* offered distributors the opportunity to display their widening range of offerings for a software-dominated electronics world

Name the electronics industry event or exhibition, and component distributors are certain to be present in full force, even at events dominated by software engineers rather than their more hardware-focused colleagues working on the latest systems designs and applications. The recent *Embedded World Exhibition* in Nuremberg, Germany, was not any different. Distributors from across the globes were noticeably present, their booths—in many cases—as prominent as the ones they occupied months earlier in Munich at the biennial *Electronica Show*. The world of software and hardware have merged, fusing in ways that many in the industry are still trying to understand. The software engineer of the future must understand hardware, and vice versa, according to industry experts who say it's difficult determining the lines separating the two nowadays. Distributors are positioning themselves as the core sector within the supply chain that has the capabilities to oversee the harmonization of the two, according to industry executives.

The top distributors were all present at *Embedded World*. So were many of the smaller companies operating in niche markets and at regional levels all over the world. The easily recognizable names such as Arrow Electronics, Avnet, Digi-Key, Future Electronics, Mouser, Rochester stood out. Look closely, though, and the rank of distributors appeared swollen with the presence of smaller companies operating in various parts of the European Union, US, China, Taiwan, and the UK. That has been the pattern for many years now. Companies based in the Nordic region were there, alongside German, Swedish, Italian and French competitors. Something was different this time around, though. Artificial intelligence (AI) was the ubiquitous application everyone wanted to talk about. This was clear in all the halls and in press statements or product announcements issued by chipmakers, software developers and third-party services vendors. Mouser Electronics in a statement said the exhibition offered it the opportunity to demonstrate its support of the electronics community as they “come together to explore



Stephan Menze, head of global innovation management at Rutronik

“We will be focusing on AI at *embedded world*, including a demo on the intelligent control of applications by starting or stopping or changing the direction of a motor with the help of AI and neural networks for radar-supported gesture control or keyword recognition”

the latest industry trends and discover a wide range of innovative technologies, processes, and future products.”

Distributors rolled out a raft of announcements indicating they are primed for the proliferation of AI. These include offerings related to systems, design, software, development information and reference tools required by AI hardware and embedded application engineers. The preannouncements from some of the distributors demonstrated how the market is now being driven primarily by AI and the components and software that have turned it into a multi-billion-dollar segment worldwide. German distributor and systems components supplier Rutronik Elektronische Bauelemente GmbH showed up with a broad set of offerings to support AI developers, leveraging its investment last year in Collective Mind GmbH, a provider of machine vision applications in the AI environment. During the show, Rutronik offered AI solutions supporting semiconductor suppliers and systems vendors, including Adlink, Asus, Intel and Kontron, according to Stephan Menze, head of

Delivering more





global innovation management at the company. "We will be focusing on AI at embedded world, including a demo on the intelligent control of applications by starting or stopping or changing the direction of a motor with the help of AI and neural networks for radar-supported gesture control or keyword recognition," Menze said.

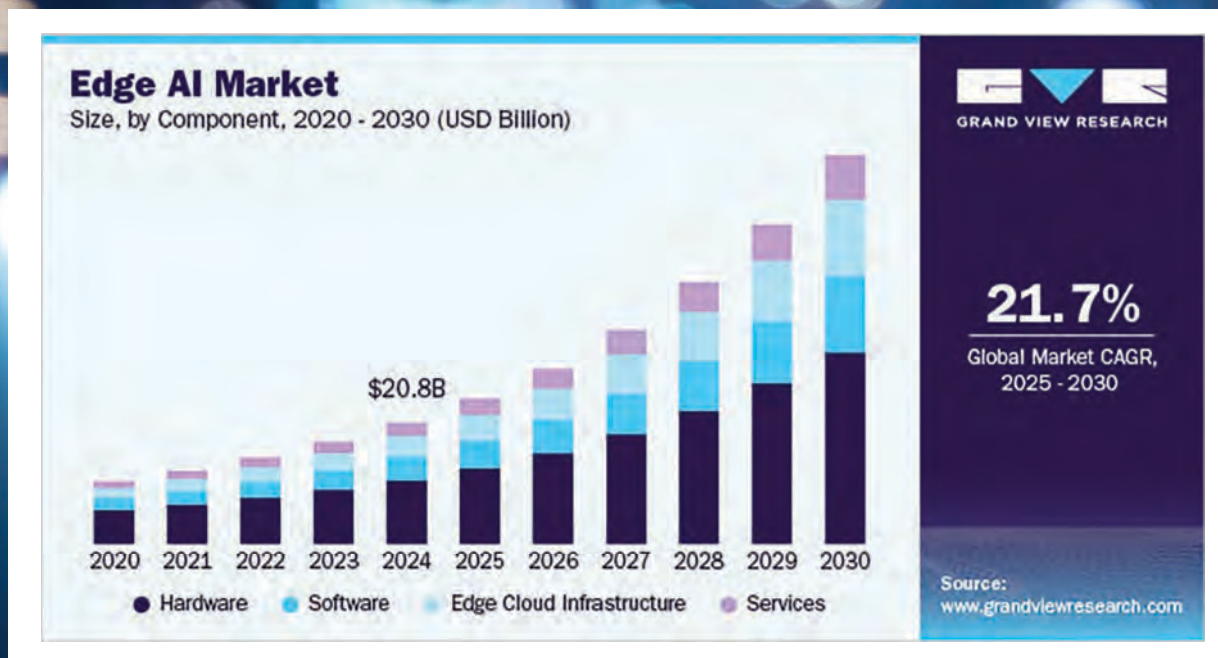
Distribution and Edge AI

The component distribution sector has had slim pickings so far in the AI market, however, due to the dominance of the segment by large developers of accelerators and systems builders such as Nvidia Corp., Advanced Micro Devices and Intel. These companies offer not just GPUs and CPUs, but also complete systems incorporating powerful software applications. They typically oversee the supply chain for these themselves or through contract manufacturers which directly manage component sourcing and the approved vendors' list, a natural bastion of distributors. This time, though, distributors have not played as prominent a role in large language model-focused AI data centers although they continue to explore opportunities to participate in the segment. The emergence of Edge AI, though, has opened another area of opportunity for distributors and their suppliers, observers noted.

Since the data processing for Edge AI takes place locally on the device – without moving to the Cloud – the opportunities are wider, according to analysts. Industry sources said they see Edge AI impacting billions of devices in markets as diverse as healthcare, industrial, manufacturing, agriculture, transportation and elsewhere. This will drive the market's growth at a double-digit pace through the next decade, said Grandview Research, a market researcher. "The global

edge AI market size was estimated at \$20.78 billion in 2024 and is anticipated to grow at a CAGR of 21.7% from 2025 to 2030," Grandview Research said, in a report. "The market is experiencing significant growth, driven by the increasing demand for real-time data processing and analysis at the network's edge."

With the Edge AI market forecast to more than double over the next five years, distributors are lining up support services that range from components to software applications and reference designs. Many of these activities are taking place in partnership with semiconductor suppliers and software developers. Future Electronics said at the *Embedded World* show that it had dozens of demonstrations on "the full spectrum of embedded solutions, from components and modules to complete systems, hardware, software, and services." These offerings include "tailored solutions" catering to Edge AI device designs. The same applies to DigiKey as well as Avnet Silica and EBV Elektronik, two European subsidiaries of Avnet. "We're witnessing a surge in design activity throughout Europe and are ready to fuel that growth with innovative new products, frictionless digital tools and design resources," said Mike Slater, vice president, global business development at DigiKey, in a statement. Avnet Silica's product demonstrations at the *Embedded World* show centered around generative AI. The company displayed its "iconic phone box," which is "hosted entirely offline ... illustrates the incredible speed, security, and efficiency of edge-based generative AI, demonstrating how local processing ensures privacy and low latency while eliminating the need for cloud connectivity."



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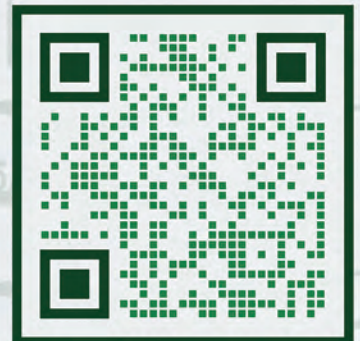


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How connectors brave the elements

TTI's business development manager, Steve Brahosky, discusses the environmental conditions that interconnects face and how their design determines their survival



TTI's business development manager, **Steve Brahosky**

'Neither snow nor rain nor heat nor gloom of night ...' Well, you know the rest. According to the famous (albeit unofficial) US Postal Service motto, the mail delivery will not be deterred by such extreme circumstances. Those same kinds of harsh conditions, and many others, threaten today's electronic connectors and the reliable performance they must deliver.

Modern electronic systems are now used for more applications than ever—in a wider variety of industries and rougher environments. These include everything from aerospace/defense to waste management to robotics—in settings from high altitudes to underwater to the factory floor. Whether in natural or controlled

environments, connectors and the sensitive electronics they protect are increasingly exposed to potential damage. However, design considerations are ongoing and continually improving connectors to withstand these conditions.

Thermal stress

Extreme temperatures cause problems. Highs create thermal expansion, leading to degradation of materials, while lows make materials brittle. Also, thermal cycling (exposure to both) significantly affects connectors' properties over time. Use materials with high thermal stability and low coefficient of expansion to minimize thermal stress.



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Corrosion and contaminants

Exposure to saltwater, industrial chemicals or acids can accelerate corrosion of metals, leading to poor signal transmission and connector failure. Use corrosion-resistant materials such as stainless steel, titanium, gold and nickel-plated

metals and polymer-based materials like Teflon, PEEK, and other high-performance polymers that are chemically resistant and non-corrosive.

Mechanical stress and vibration

High levels of vibration or mechanical shock (impact, earthquake, explosion etc) can cause fatigue failure, intermittencies and connector separation. Use strong mechanical mounting and latching mechanisms and flexible materials. Strain-reliefs absorb external forces and are crucial for ruggedized connectors, along with retention clips to help prevent disconnections.

Electromagnetic interference

Environments with high levels of electromagnetic interference (EMI), due to proximity to multiple electronic devices, can degrade performance or cause data transmission errors. Metal shielding of interconnects, along with wires/cables and proper grounding, will prevent EMI. Using ferrite beads (which act as low pass filters) or embedding EMI filters in the connectors can also help mitigate its effect.

Altitude and pressure

In high-altitude environments, such as space, low pressure can cause out-gassing of materials, which reduces insulation properties, allowing condensation and leading to connector failure. Environments with high pressure, such as underwater,

can compromise the integrity of connections and cause mechanical deformation. Use seals, such as O-rings, gaskets or compression seals, which can withstand pressure differential between internal and external pressures. Flexible, lightweight seals made of neoprene or silicon might be sufficient for low-pressure environments. Hermetically sealed connectors are required for space environments.

Interconnect solutions designed to withstand extreme conditions produce tremendous benefits: increased reliability and durability, extended operational lifespan, application versatility, reduced downtime and substantial long-term cost savings.

TTI takes pride in guiding its partners to the best technology available for their needs, sourcing connectors built specifically for harsh environments. The company brings decades of combined experience to the table to deliver exactly what is most appropriate for each scenario today and going forward.

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Cody Walseth, digital product owner - digital tools, **DigiKey**

Using DigiKey's myLists tool—our advanced parts list management solution—procurement professionals and engineers can streamline the entire buying process while gaining enhanced visibility into component sourcing.

This transparency enables buyers to manage orders more effectively as they navigate the supply chain, marking a significant advancement over traditional manual methods like spreadsheet sharing and email orders.

Enhancing Accuracy and Efficiency in Parts Management

Customer insights from surveys have highlighted the value myLists offers with guidance when incorrect part numbers, quantities, or other inconsistencies are detected in a parts list. The platform flags potential issues such as duplicate entries, unmatched part numbers, obsolete components, or low product availability, helping users proactively address sourcing challenges before they escalate.

A Smarter, More Connected Workflow

Speed and efficiency are critical in electronics design, including the procurement process, and DigiKey is continuously innovating to meet these demands. One of the latest enhancements is our collaboration with Ultra Librarian, integrating myLists with Ultra Librarian's UltraBOM for a fully connected component discovery and procurement experience in the OrCad PCB software suite.

Procurement and engineering teams often operate in silos, leading to inefficiencies and delays in product development. Traditionally, engineers use flat files, like spreadsheets, to send part lists to procurement professionals who are responsible for sourcing and securing components—a process vulnerable to fluctuations in the supply chain. Linking DigiKey's myLists with UltraBOM streamlines this

process. MyLists provides an all-in-one, collaborative experience on a single DigiKey platform, creating alignment between design and procurement teams.

Real-Time Procurement Within OrCAD Capture PCB

For engineers using OrCAD Capture PCB software, the integration of UltraBOM provides real-time access to pricing and product availability within their design environment. Engineers can send a bill of materials (BOM) to DigiKey with a single click. This enables seamless purchasing while ensuring engineers and procurement professionals receive accurate, up-to-date component data early in the design process.

Driving Efficiency in Procurement and Design

By integrating myLists with UltraBOM, DigiKey and Ultra Librarian are addressing a critical pain point in electronics sourcing: the disconnect between engineering and procurement. DigiKey and Ultra Librarian's partnership empowers engineers to maximize their productivity and efficiency by connecting essential design data, enabling a continuous digital thread from concept to production within the OrCad and DigiKey environments.

DigiKey remains committed to refining myLists and integrating with industry-leading solutions to ensure its customers can access the most efficient and comprehensive procurement tools available.

For more information on how DigiKey and Ultra Librarian can enhance your procurement and design process, visit www.digikey.com.

Tariffs — deal or no deal?



John Denslinger is a former executive VP Murata, president SyChip Wireless, and president/CEO ECIA, the industry's trade association. His career spans 40 years in electronics

This month John Denslinger provides readers with a fascinating insight into tariffs, concluding with hope that common sense trade policies prevail and reciprocity is quickly achieved

Mark the date 2 April 2025. It's the day reciprocal tariffs kicked-in as foretold by President Trump in his first Congressional address of his second term. While this might be the President's most consequential action to date, it's just the third leg of his tariff stool.

The first leg was announced early in his campaign: 'make your product in America' and negate the threat of tariffs altogether. Evidence suggests this initiative continues to be remarkably successful with nearly two trillion dollars of new business investment by foreign and domestic based companies. Skipping the tariff uncertainty may be the headline, but gaining immediate regulatory relief and risk-free access to the world's largest consumer market is the win-win.

The second and final leg was created by Executive Order on 1 February. Announced as a tariff, the target was not trade per se, but behavior. It levied substantial financial penalty on three of our top trading partners Mexico, Canada and China pressing each to: (1) control illegal migration, and (2) stem the flow of fentanyl into the US. To be fair, meaningful progress takes time and results to date are inconsistent. As a result, the administration's on-again, off-again policy approach generates considerable uncertainty unnerving many domestic suppliers, buyers, traders and business owners.

Have you heard of the Fair and Reciprocal Plan? I for one, had not. It's the administration's comprehensive tariff assessment mapping current trade imbalances with each country, defining equivalent reciprocal tariffs for each trading partner, and assessing the impact of these measures on the US economy and specific at-risk industries. The trade imbalance map summarizes all the protectionist measures directly or indirectly applied to goods and services. The list is really amazing: import taxes and tariffs; VAT; non-tariff barriers; subsidies; burdensome regulations meant to restrain trade;

exchange rate manipulation; and practices unfairly restricting access to certain markets. It's the basis for the 2 April third leg.

For those in procurement with global suppliers, doing business via Canada, Mexico, China, Japan, Germany, South Korea, India, UK, Taiwan and Vietnam, Trump's tariffs are proactively imposed so expect initial retaliation before some harmony is restored.

Can tariffs work? Tariffs are a 'deal' if they quickly result in fair trade reciprocity. Tariffs are 'no deal' if trading partners counter with retaliatory measures. Reciprocity offers predictability. Retaliation does not.

National Association of Manufacturers (NAM) president and CEO, Jay Timmons, released a statement worth noting: "...to mitigate the adverse effects of today's tariffs, manufacturers call on President Trump and Congress to implement a comprehensive manufacturing strategy that creates predictability and certainty to invest, plan, and hire in America."

NAM advocates the following actions: (1) make the 2017 tax reforms permanent and competitive; (2) restore regulatory certainty freeing manufacturers to shift billions of dollars from burdensome compliance to pro-growth investment; (3) expedite permitting reform to unleash American energy dominance; and (4) implement common sense trade policies that open global markets fairly and effectively.

World-class manufacturers continue lining up to invest huge sums in America. Avoiding tariffs could be one reason, but the long-term benefit of pro-growth, pro-energy and regulatory-lite policies is a business owner's dream. Unwinding protectionist legacies country-by-country is a protracted process. Let's hope common sense trade policies prevail and reciprocity is quickly achieved. That's the deal.

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As an authorized distributor with a commitment to customer service excellence, Mouser Electronics offers 28 global Customer Support Centers and has the professionals, products and procedures in place to assist buyers and engineers throughout the design and buying process. Mouser has developed an online resource site for purchasing professionals at <https://resources.mouser.com/purchasing-resource-library>.

Today more than ever, buying from an authorized distributor is the only sure way to eliminate the risk of counterfeit or gray market products. It has never been more critical to select genuine products that are 100% certified and fully traceable from each manufacturer.

Mouser also offers a full suite of online tools to help simplify the purchasing

process, such as the Price and Availability Assistant, which makes online buying quick and efficient. It's the latest addition to a library of productivity and pricing tools from Mouser that includes the FORTE intelligent BOM tool, ECAD design resource solution, inventory management tool, API services and order automation, all accessible through <https://www.mouser.com/servicesandtools/>.

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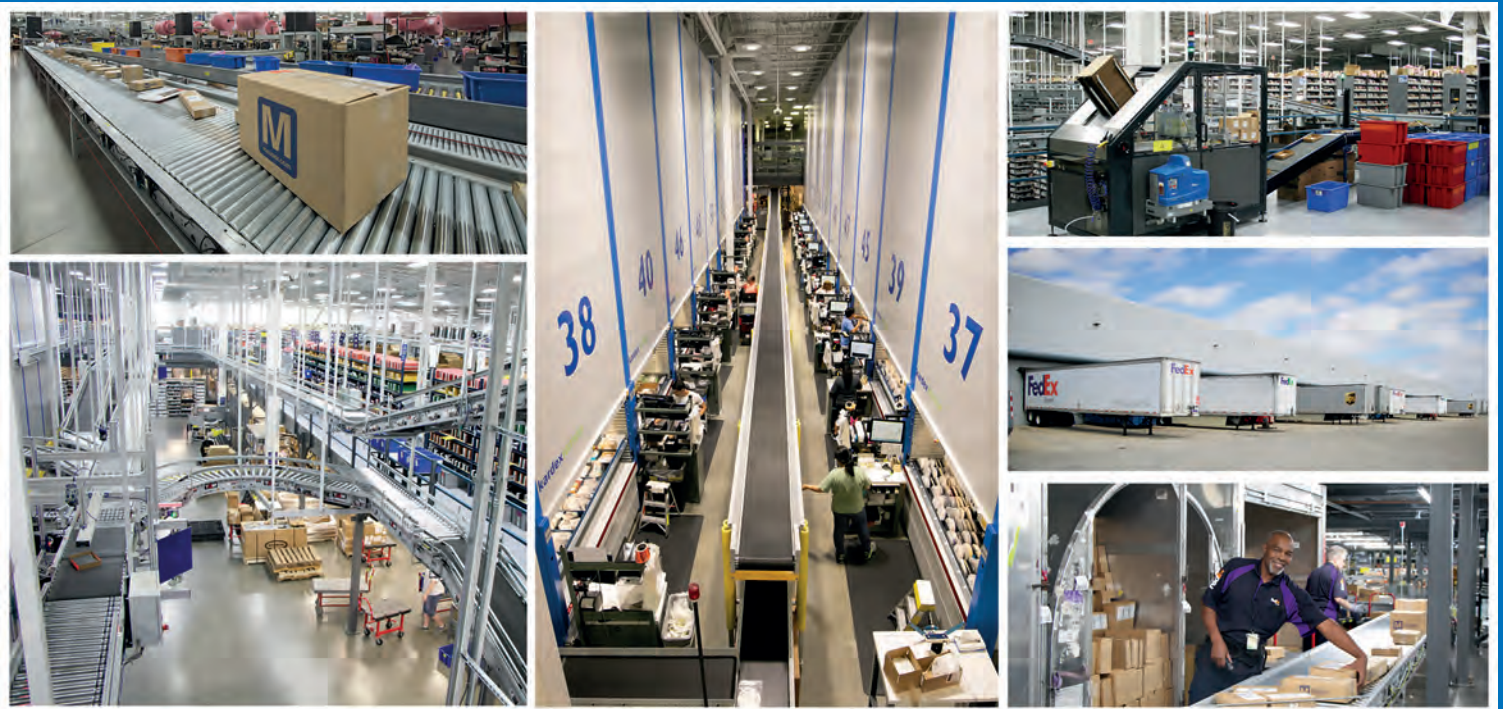
With over 60 years of serving buyers and engineers, Mouser specializes in the introduction of the newest products and technologies from its 1,200 manufacturer brands.

The company's extensive product offering includes semiconductors, sensors, optoelectronics, embedded solutions, interconnects, passives, test and measurement, and electromechanical,

plus a vast range of other components authorized from the top manufacturers in components. Mouser sells millions of tiny parts that function as the essential building blocks of new product design, with leading-edge components that are smaller, faster and smarter.

Some sources are very limited in their component offerings, but that's not the case with Mouser. With more than 1.1 million available SKUs, the company's wide selection of inventory allows choices and alternative solutions for customers. Along with a focus on new product introductions, Mouser continues to expand its industry-leading website, [mouser.com](https://www.mouser.com), with search enhancements, tools and technical resources for buyers and engineers.

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2024 Hits Distributors with Sales Drop of -9.3%

2023/2024 Declines Follow Record Revenue Growth of 2021/2022 by Top 50 Americas Distributors

The results of 2024 sales growth continue a revenue growth pattern for the Top 50 Americas Authorized Electronic Component Distributors that began eight years ago. In 2017 and 2018 the industry enjoyed double digit growth. These two years of strong sales growth were followed by two years of declining sales. Then in 2021 and 2022 the industry experienced an unprecedented boom in sales growth. Once again, the surge in sales for two years has been followed by a two-year decline. The latest survey results of the Top 50 Americas Authorized Electronic Component Distributors finds that 2024 sales fell by 9.3 percent compared to 2023 sales. Revenues for 2024 were still \$5.4 Billion, or 23.4%, above 2020 revenues, the last year before this current cycle. This was an especially challenging year for the largest distributors with the top five largest distributors seeing their cumulative revenues fall by more than 11%. All top five of the distributors suffered a decline in revenues in 2024. This strong drop in revenue among the top distributors is explained by their large share of Semiconductors and Passive Components, which both experienced strong declines. By contrast, 73% of companies ranked between #6 and #50 achieved revenue growth in 2024. This group saw their combined revenues grow by 4.9% and added 4% to their cumulative share of the total authorized Americas distribution market.



**Dale Ford, ECIA
Chief Analyst**

It would be hoped that the historic pattern of Americas sales growth would continue and support renewed strong growth in 2025. Unfortunately, the imposition of steep tariffs on all countries around the world by the Trump administration has created extremely strong headwinds even though they were paused for 90 days for all countries except China. Given the strong role of China in the electronics industry, the trade war between the U.S. and China is especially troubling for the industry. It is no surprise that Tariffs and Geopolitical Conflicts surged to the top of the most significant challenges currently facing the electronics components distribution industry as identified in the survey. Tariffs were the main focus of meetings in the recent ECIA joint council meetings with the major discussions centered around managing tariffs

from both a strategic and operational perspective. This was followed by a major Town Hall meeting with all ECIA members to share insights into tariffs from the discussions in these joint council meetings. It would appear that tariffs are the dragon which must be slayed if the electronics component distribution industry is to return to overall growth in 2025.

Interviews with experienced distribution executives yield important understanding regarding major challenges and opportunities facing authorized electronics components supply chain participants. As part of the survey to identify the “Top 50 Americas Authorized Distributors,” executives were asked to rate the level of severity they anticipate for various supply chain challenges. As noted above, Tariffs and Geopolitical Conflict were the top areas of concern. Looking at opportunities, Artificial Intelligence (AI) surpassed all other areas in the assessment of opportunities for both the near-term and long-term. The results of the survey are shown below. Selected categories aligned with these topics were addressed in interviews with these leading industry executives.

Tariffs and the Value Delivered by Authorized Distribution

Tariffs and export controls have re-emerged as critical challenges for

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Headquartered in Thief River Falls, Minnesota, DigiKey is recognized as the global leader and continuous innovator in the cutting-edge commerce distribution of electronic components and automation products worldwide. As an original pioneer in this space, DigiKey has been a key resource for engineers and procurement professionals for over 50 years. Today, DigiKey provides more than 15.9 million components from over 3,000 quality name-brand manufacturers with an industry-leading breadth and depth of product in stock and available for immediate shipment.

DigiKey is a multi-billion dollar company that employs more than 4,700 people globally, delivering an average of 25,000 orders per day to customers in 180+ countries around the world. With a strong background of serving as a critical partner for companies around the world, DigiKey had humble beginnings in 1972 as a small mail-order company selling leftover parts for a digital electronic keyer kit (the Digi-Keyer). Today, they are recognized as a global leader in the distribution of electronic components and automation products worldwide. This year, the company is creating more exclusive partnerships with suppliers and adding new digital tools and resources to its website. All of these new developments will allow the organization to meet and exceed customers' expectations more efficiently.

DigiKey is proud to be widely recognized as the leader for:

- **Availability of products**
- **On-time delivery**
- **Overall performance**
- **Engineer-friendly website**
- **Customer service**

DigiKey accelerates progress for every designer, buyer and builder with a wide variety of tools and digital solutions to make innovation easier. Beyond the products that drive technology innovation, DigiKey also delivers frictionless interactions to move people towards next-generation solutions, business growth and operational efficiency.

DigiKey continues to find creative ways to enhance its offerings and services to maintain high customer and supplier satisfaction. For example, it has invested in more robust and predictive web search functionality, higher inventory levels and increased warehouse automation, all of which benefit customers by providing an easy and efficient research, shopping and delivery experience.

DigiKey's Marketplace is a single source for all aspects of technology innovation, including bare PCBs, automation and control, test and measurement, IoT solutions and virtually all things related and adjacent to technology innovation, all through a singular shopping experience.

DigiKey is always developing new ways to make it easier for buyers to engage digitally. To remove barriers for global customers, DigiKey is localizing its experience in markets around the world with local language, currency and support, as well as fast shipping times.

Learn more at www.digikey.com.



ECIA Top 50 Americas Authorized Distributors Report 2025

electronics component distributors. The uncertainty around tariffs has resulted in a significant increase in risk for all participants in the supply chain. The question presented in interviews with top industry executives is, “How can distributors support their partners in managing through this uncertain climate?”

“It is extremely important that distributors have frequent and open communication with their customers and suppliers to ensure no misunderstandings on their handling of tariffs beyond their control” according to David Loftus, ECIA, President & CEO. He highlighted a valuable tool provided by ECIA to help with clear communication. “One tool is the website TrustedParts.com that informs customers proactively that certain parts are subject to tariffs. This invites conversation about how those tariffs are handled and also what alternatives may be available. Distributors can



Chris Wadsworth,
WESCO,
VP/GM, Global OEM

communicate with their suppliers which devices with imposed tariffs are losing competitively in the marketplace, so that suppliers may have more information and justification for potentially relocating production sites.”

Chris Wadsworth, WESCO, VP/GM, Global OEM, elaborated on the

importance of communication and the opportunity this affords to identify solutions. “Regular and consistent communication, which includes providing as much detail as possible to justify the increases, as well as the operating procedures to pass on the inflationary tariff costs, is critical. Each company has equal exposure so working together is table-stakes. The rules and conditions are changing with each day/week which drives many starts and stops in planning execution across the wide and diverse set of products with subcomponents coming from all over the world. This disruption is an operating cost and tight communication between suppliers and distributors to our customers must happen. Knowing where all the sub products come from and how they impact on the total cost of goods is necessary as we work to pass on these costs rationally and logically. Manufacturers and distributors can provide some very short-term options to have our customers purchase products ahead of the tariffs with timely information on price/cost dynamics and or provide alternative solutions that may avoid or minimize the tariff impact. Customers with design flexibility will be in the best position to offset the total tariff impact.”

“Avnet leverages its Foreign Trade Zone (FTZ) and global warehouse network to support customers’ supply chain needs” shared Dayna Badhorn, Avnet, Regional President, Americas Electronic Components. “While supply chain adjustments take time, collaborative partnerships help develop optimal solutions. Additionally, we are actively assisting customers in analyzing their Bill of Materials to identify and mitigate potential tariff risks.”

Mike Slater, Digi-Key, VP, Global Business Development, describes how their engaged communications combined with their FTZ program enables valuable benefits for their customers. “DigiKey is actively engaged in discussions with our suppliers and industry tariff experts



David Loftus, ECIA,
President & CEO

to understand how we can mitigate the impact these tariffs have on our customers. We continue to monitor and adapt to evolving changes, which will best position DigiKey to continue providing high-quality products at cost-effective pricing. In our experience, consumers are aware of tariff-eligible products and frequently compare products with and without tariffs to make their purchasing decisions based on factors such as specific specifications, quality, and reputation. Partnering with DigiKey’s Foreign Trade Zone (FTZ) program allows DigiKey to become the Importer of Record (IOR), handling paperwork, declarations, and tariff management, resulting in lower costs and more competitive prices.”

“Distributors are always a critical node in the supply chain, especially during times of uncertainty” states Adam Osmanec, Arrow, VP, Global Supplier Development. “In today’s business environment, we are focused on balancing consistency, agility, and compliance in our strategic responses with the goal of offering fairness and predictability to our partners. We don’t know what the future will

Continues on page 29



SAGER ELECTRONICS, 135 YEARS AND COUNTING

Sager Electronics is a leading North American distributor of Interconnect, Power, and Electromechanical products and custom solutions provider. Grounded in 135 years of innovation and service, Sager provides customers and suppliers a unique combination of operational excellence and innovative business solutions through its Distributing Confidence business model.

Proud Tradition of Innovation and Service

Sager Electronics began in 1887 as a single storefront in downtown Boston that serviced the growing interest in radio technology. Under the vision and leadership of Joe Sager, the company rapidly established a statewide distribution system for home radios and related components. Despite the onset of the Great Depression, Sager continued to grow by bringing new electrical products to Massachusetts' consumers.

From Retailer to Distributor

At the onset of WWII, Sager reacted to the critical demand for electronic components. The company refocused its operations to supply electromechanical components to the U.S. military. This transition positioned

Sager to emerge as the leading regional electronic component distributor at the beginning of the consumer electronics market in the 1950s and 60s.

From Regional to National Prominence

Anticipating the explosive growth in electronics, in 1977, we relocated our headquarters to more spacious facilities in Hingham, MA and began building a national network and infrastructure. This included the prudent acquisition of smaller regional distributors and the creation of regional support facilities to service our expanding network of customers and suppliers.

In 2012, Sager Electronics was acquired by TTI Inc., a Berkshire Hathaway Inc. company. As a wholly owned subsidiary of TTI Inc., Sager operates independently and has made a number of acquisitions to support its business. In June 2014, Sager acquired PowerGate LLC, a premier North American power specialist distributor. This acquisition preceded Sager's 2015 purchase of Norvell Electronics, a North American power products distributor with extensive design and value-add capabilities. Sager acquired Power Sources Unlimited Inc. in 2017, and in 2019 completed the acquisition of Technical Power Systems, a battery custom solutions provider.



Headquartered in Middleborough, MA, Sager operates a network of field sales representatives and power systems sales engineers, strategically located service centers across North America, two state-of-the-art distribution centers, and custom design and manufacturing facilities.

From National Prominence to Distributing Confidence

For over 135 years, the key to our success has been our constant commitment to exceeding the expectations of our customers. Our Distributing Confidence business model puts our customers' needs at the center of all our activities. From our customized services like bonded inventory programs, VMI, BOM quoting, credit, inventory management and value-added capabilities to our branded line card of authorized manufacturers, Sager Electronics is a full partner with our customers.



ECIA Top 50 Americas Authorized Distributors Report 2025



Aiden Mitchell,
Arrow, SVP, Global
Supplier Management

bring, but we're confident in our global network and our ability to adjust course as needed."

Inventory, inventory everywhere! But not what I need!

While overall average component lead times have declined substantially, there is an ongoing issue related to the mix of components that can still result in challenges delivering the latest, more advanced components. The industry executives were asked, "How can distributors best support their customers in balancing their component supply?"

David Loftus states, "Reducing the impact of lead times is a two-way proposition. Distributors must work with their customers to provide rolling extended forecasts to provide insight into longer-term needs such that the distributor can pipeline proper inventory on behalf of the customer."

Providing a specific scenario where two-way communication and flexibility enables optimal results, Chris Wadsworth shares, "Partnering with our customers on their forecasts well ahead of the need for delivery is key to success. Forecast accuracy drives many issues in the supply chain and

the better real data, the better the results will be. Many times, the supply chain is surprised by demand which creates issues on components and many failures result and the channel goes into "chasing part mode" and the customers are often left with few choices other than to wait. As we communicate to our manufactures the real demand, many times they can

get the raw materials in place to hit the timelines. Having flexibility in the components selected in the design cycle drives lead times down. The single sourced solution has improved over time, but many still exist. When a distribution company like WESCO is

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It's a long way from a half-century ago when the TTI founder and distribution center namesake sorted resistors into paper bags at his kitchen table and hand-delivered them to manufacturers around Fort Worth. From that modest beginning, TTI has grown to 9,000 employees supporting more than \$9 billion in global sales, making the company a key contributor to the Berkshire Hathaway family of companies. Today, TTI serves customers from hundreds of offices and distribution centers on every continent but Antarctica.

This financial strength, depth of experience and infrastructure allows the people of TTI to provide unparalleled reliability that the company's customers and supplier partners depend on. That's a rare commodity in a world where supply chains seem to be broken more than not. And it's more than just a remarkable on-time delivery record, TTI works upstream with suppliers to manage and stock components to a breadth and depth of inventory that customers can rely on.

This TTI inventory is a curated, specialized mix of fully authorized electronic components focused on interconnect, passive and electromechanical, known as IP&E, as well as discrete semiconductors, sensors, optoelectronics, power and protection components. Some distributors carry thousands of lines, TTI works with fewer than one hundred, a select few of the industry's premier suppliers, chosen for their ability to provide our customers value based on established reputations for quality, innovation and delivery.

One key difference TTI customers know is the personal touch and expertise TTI Specialists bring to their relationship. With local

branch offices around the world, the TTI human components are available to bring vast component intelligence right to the buyer's desk and product details and samples to the design engineer's workspace. This personal service is complemented by a depth of technology that links TTI inventory around the world and information systems offerings to seamlessly integrate that inventory into customer manufacturing platforms through APIs.

The TTI history of innovation, service and reliability has helped enable a technological revolution across a wide array of industries including defense, space exploration, medical technologies, transportation, manufacturing, environmental, energy and more. As electronification moves our world, Manufacturers around the globe rely on TTI's experience as a proven supply chain partner to meet whatever challenges the future may hold.

Learn more at www.tti.com



ECIA Top 50 Americas Authorized Distributors Report 2025



Mike Slater, DigiKey,
VP, Global Business
Development

able to offer alternatives that would improve the lead time, the customer has a winning solution. WESCO works hard on the design side and have many technical resources in place to help our customer's engineers choose alternative options which de-risks the lead time challenges."

Elaborating on the critical role of communication, Aiden Mitchell, Arrow, SVP, Global Supplier Management, explains, "Demand Forecasting and Planning: Implementing robust demand forecasting and planning tools can help distributors predict which advanced components will be in high demand. Accurate forecasting enables us to place orders well in

advance and manage inventory more effectively to meet customer needs.

- Customers are looking for improved visibility around longer lead time parts to be able to track and look for delays/decommits
- Customers are also establishing processes to handle just in case situations by applying buffer demand in the event longer lead time parts are not positioned in time"

DigiKey employs a three-pronged approach to help their customers with inventory issues as described by Mike Slater. "At DigiKey, our goal is simple - we want the widest selection of products available for our customers. We grow that selection in three key ways:

- New Product Introductions (NPI): We take a minimum order of almost everything and let our customers decide what sells. We want our customers to have immediate access to the latest technology to drive innovation and solve problems. DigiKey distributes more NPIs than any electronics distributor.
- Part Conversions: We list many parts we don't stock initially. We also analyze many data points, vertical markets and industry trends to spot rising demand.

Based on that, we move high-potential parts from "non-stocking" to "stocking" status.

- Marketplace Growth: This platform lets us offer parts that may not fit traditional models to keep in stock—whether due to size, complexity, or niche demand—while still giving customers DigiKey's service guarantees.

We're always looking for new ways to expand selection and meet customer needs, and we're confident that our approach will continue to deliver results."

Dayna Badhorn summarizes, "Effectively managing varying lead times requires visibility into future production needs and close collaboration with partners on supply chain planning. This approach enables distributors to work with manufacturers to establish supply pipelines, ensuring lead times are streamlined and aligned with customer requirements."

Distributors Enabling the Future

The question posed to executives was, "With exciting opportunities in new, high-growth markets such as AI, Automotive Electronics, and pervasive

Continues on page 32

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Communications solutions, what types of specialized support must distributors provide to their customers to enable their success?” Distributors have the opportunity to build expertise and tailor offerings to unique needs. For instance, the EV boom drives demand for power electronics, while healthcare seeks reliable, long-life lifecycle components.

David Loftus summarizes the opportunity for distributors. “With emerging technologies, distributors are at an advantage if they can provide detailed reference designs and even demo boards with newer components to customers to help accelerate the customers’ design cycle. This also offers the distributor the opportunity to pull through other devices from that supplier or other suppliers on their line card that are included in reference designs. Most engineers will readily accept a valuable reference design as a subset of their overall design process if it is a proven and reliable solution.”

Continuing this perspective, Dayna Badhorn states, “By understanding technologies within specific end

equipment and verticals, distributors serve as an extension of their supplier partners and provide valuable support to OEM customers. Access to extensive data enables us to identify widely used components across various applications, helping streamline the design process and reduce engineering time by ensuring customers have the right technology from the start.”

Mike Slater shares multiple tools that DigiKey delivers to support customers. “DigiKey supports customers in several ways. First, through our industry-leading website, which offers several different buying experiences, like APIs, EDI, punchout catalog, our parts list management tool, myLists, and more. We also offer digital tools like our Scheme-It, CAD models, various forms of content and TechForum, where customers can ask questions of our community of technicians, engineers, and, in some cases, the manufacturer. We are a stocking e-commerce distributor where nearly 95% of our products are in stock and ready to ship the same day the order is placed.”

Outsourcing non-core functions to distribution partners enables companies to focus on their key differentiators as they compete in the market as explained by Chris Wadsworth. “Service and value add offerings that take labor, and non-core competencies off of the customer, will help customers win in hot growth markets. Oftentimes, customers find themselves in a capacity constrained situation when they attempt to perform all aspects of their product to market ecosystem. By outsourcing non-core functions to a distribution company, that customer can spend their capacity where they can add the most value and invest in those areas, versus in every area of their ecosystem. Each customer is unique, but companies like WESCO offer many options, which include kitting and light assembly, sourcing and stocking and managing tail spend, and product configurations to name a few. Secondly, customers can leverage



Dayna Badhorn,
Avnet, Regional
President,
Americas Electronic
Components

the engineering and design expertise from the channel, including WESCO, that will help the customer meet their goals and needs in the strong secular vertical market trends. At WESCO we continue to expand our service portfolio both organically and through acquisitions to help our customers win in the booming growth markets.”

Adam Osmanec provides excellent examples of specific needs related to advanced technologies and how Arrow provides essential technical support for their customers.

“Customers are always pressured to accelerate their time to market while technology complexities continue to increase and there’s a shortage of engineering talent, thus customers are leaning on distribution partners to become an extension of their engineering organization to support R&D efforts. This was validated in the recent ‘Mind of the Engineer’ survey completed by Aspencore where design engineers in all regions acknowledged an increase in outsourced engineering development to third parties. 63% of engineers also agreed that SW has become



Adam Osmanec,
Arrow, VP, Global
Supplier Development

Continues on page 36



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Strength in Numbers: The Power of Collective Action in Sustainability

Sustainability efforts often highlight individual actions like waste reduction and energy conservation. However, the most significant impact comes from collective action, where organizations collaborate to drive systemic change. By leveraging strength in numbers, industries can accelerate environmental goals and optimize resources for better sustainability outcomes.

How Collective Sustainability Programs Work

Sustainability-minded companies partner with think tanks and nonprofit organizations to address environmental challenges. These groups centralize research, develop best practices, and advocate for policy changes. Community renewable energy programs, for example, help organizations invest in solar and wind energy, reducing carbon footprints and enhancing resilience. Similarly, industry-wide sustainability programs provide resources, policy influence, and coordinated efforts to achieve environmental goals, focusing on:

- Emissions reduction strategies
- Resource optimization and waste minimization
- Development of best practices
- Public outreach and advocacy

Leading Organizations in Collective Sustainability

Several global organizations drive collective sustainability efforts:

- World Business Council for Sustainable Development (WBCSD) unites over 230 companies to tackle climate change and ecosystem restoration.
- CleanTech Alliance promotes sustainable technology and job growth across industries.
- American Sustainable Business Network (ASBN) collaborates with policymakers and investors to foster a sustainable economy.

- Global Electronics Council advances sustainable purchasing

and manufacturing, driving significant energy savings.

Despite these efforts, no organization specifically addresses sustainability in electronic components manufacturing and distribution. Given the industry's scale, forming alliances could drive impactful change through shared practices and policies.

The Potential for Collective Action in the Electronics Industry

The electronics sector has significant opportunities for sustainability collaboration, including:

- E-Waste Reduction: Standardizing recycling and extending component lifecycles.
- Sustainable Materials: Driving industry-wide adoption of eco-friendly materials.
- Education & Engagement: Influencing consumer behavior and industry practices.
- Circular Economy Policies: Encouraging reuse and reclamation to minimize waste.
- Supply Chain Sustainability: Establishing standards for emissions reduction and ethical labor practices.

By working together, manufacturers and distributors can enhance sustainability throughout the supply chain, shaping product development, industry regulations, and corporate policies.

Waldom's Commitment to Collective Sustainability

While the electronics industry lacks a formal sustainability alliance, Waldom Electronics leads by example. Our Green Stock Program prevents electronic components

from ending up in landfills, helping manufacturers and distributors meet ESG commitments while maintaining critical inventory access.

As the industry moves toward sustainability, collective action will be key to creating a more responsible and efficient supply chain. Waldom remains dedicated to driving this change through innovative programs that foster environmental stewardship.

Join us in shaping a sustainable future.

Learn more at www.waldom.com.



REDUCING WASTE RESTORING FORESTS

Every Green Stock order = One tree planted

Waldom's Green Stock Program offers a sustainable and profitable alternative to scrapping excess components.



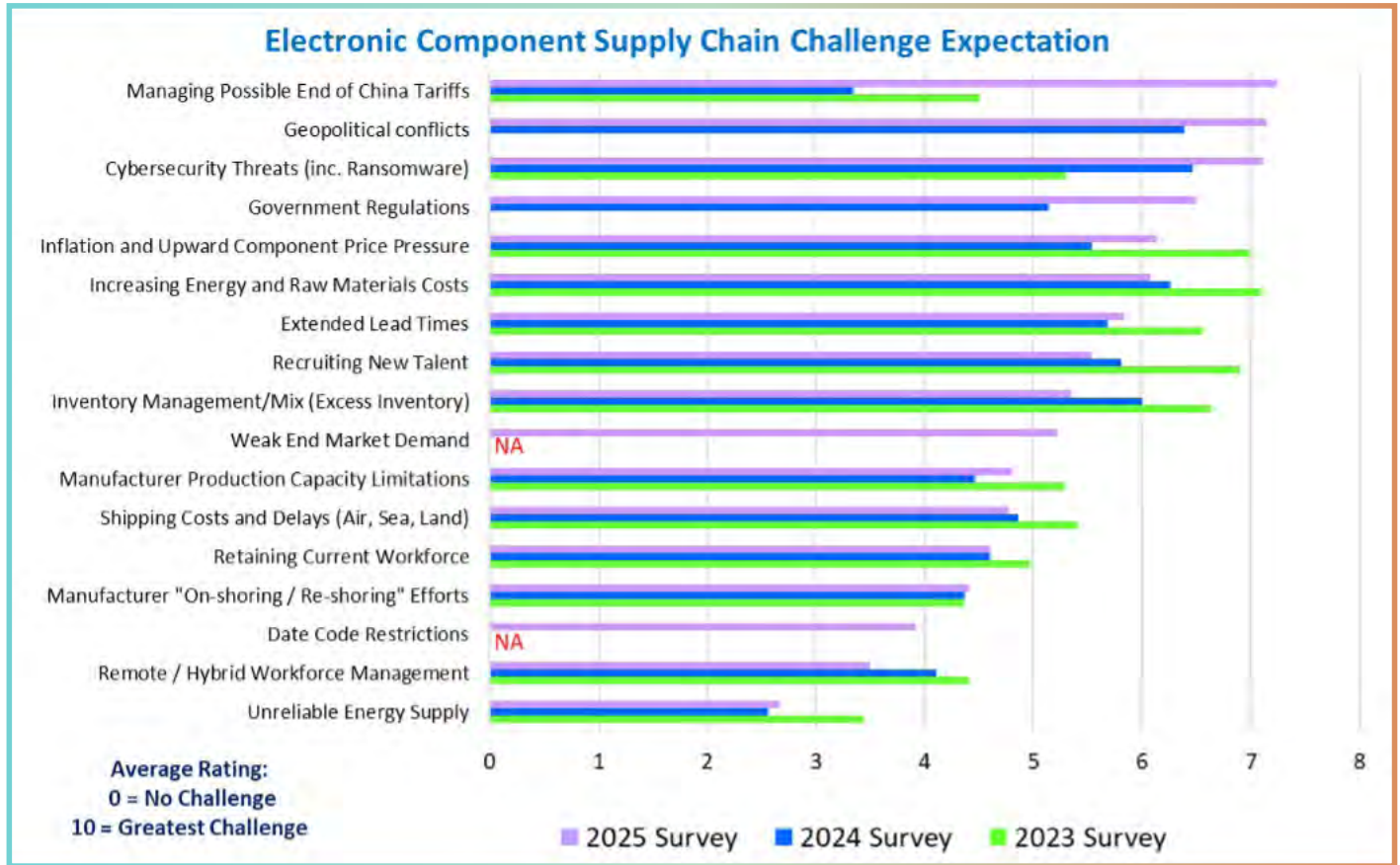
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ECIA Top 50 Americas Authorized Distributors Report 2025

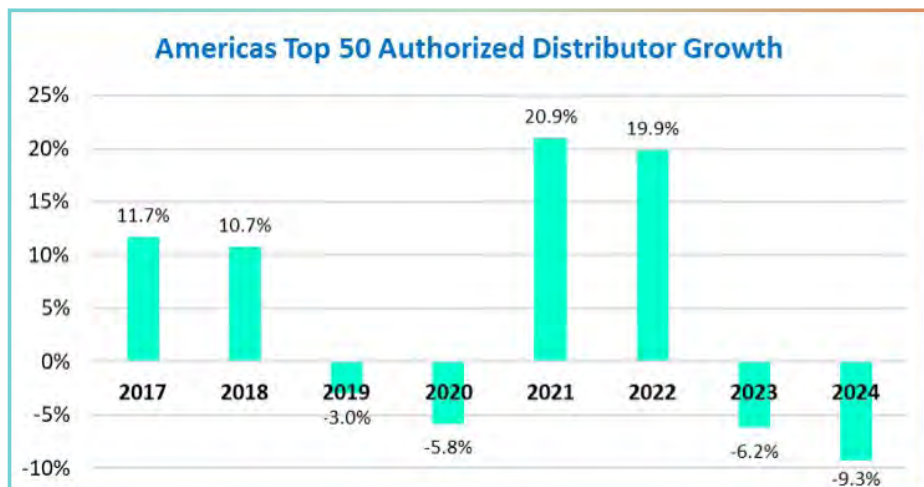


an important consideration for all projects and, of course, with the rise of AI at the edge there's an increasing demand for embedded software development. Some examples include the importance of Autosar expertise for software defined vehicles and transportation, the increasing importance of cyber security driven

by the Cyber Resilience Act, and functional safety for industrial 4.0.

"Distributors must have vertical segment domain engineering expertise at the system level to help customers get to market. The development of pre-certified system level solutions, reference

designs and IP accelerators, and proof of concepts for high growth applications like EV-C, Battery Management Systems, and AMR are good examples where distributors must have product engineering design expertise from edge to cloud, scaling beyond component level only technical support with subject matter expertise."



Delivering Intelligence to the Channel

As the suppliers and customers of electronics component distributors adopt AI technology in their supply chain management, how are distributors responding to successfully interface and engage upstream and downstream? Distribution executives shared their insights into this question.

Continues on page 41



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NASCO

AEROSPACE AND ELECTRONICS

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MAKING OBSOLESCENCE OBSOLETE

Bill Bradford, President of Flip Electronics

At Flip Electronics, we believe in “Making Obsolescence Obsolete.” While technology evolves and components reach the end of their lifecycle, we have developed a twofold strategy to address this challenge. First, we ensure that remaining excess inventory is available to customers. Second, through our acquisition of Resurgent Manufacturing Services (RMS), we can license the manufacturing of mature legacy parts, allowing continued production as long as we can source critical components such as headers, substrates, and wafers.

Beyond distribution, we also have the capability to store and bank wafers and manufacturing components as needed over time. This means we don’t just offer a robust stocking solution—we provide long-term, scalable manufacturing support. Our goal is to help customers maintain their products without being forced into costly redesigns due to component obsolescence. As an authorized distributor, we ensure a secure, reliable supply chain that protects customers from the risks associated with the gray market.

A Vision for Reliable Semiconductor Distribution

Flip Electronics was founded in 2015 by Jason Murphy, a veteran in component distribution who recognized an underserved need in the market. When semiconductor parts reach the end of their lifecycle, both suppliers and customers face

significant challenges. Suppliers must phase out product lines efficiently while managing excess stock, while customers often require components for years beyond their official end-of-life, leaving them in a difficult position once the authorized supply runs out.

Traditionally, customers have had limited options, often turning to the gray market, which carries risks of counterfeit products and quality issues. Jason’s vision was to establish a distribution model that would work directly with suppliers to support post-end-of-life demand in an authorized, reliable manner. Flip Electronics bridges the gap between suppliers and customers, providing a structured, secure, and long-term solution for component obsolescence.

Expanding into Global Markets

Flip Electronics has expanded into the EMEA region, where OEMs in aerospace, medical, automotive, and industrial sectors are increasingly challenged by shrinking component lifespans. Our presence in these markets will provide critical support, ensuring access to obsolete and end-of-life semiconductors and electronic components directly from manufacturers or through licensing their manufacturing flow to continue ongoing production of the components, utilizing RMS.

This reinforces our position as a global leader in semiconductor

distribution and supply chain management leader. As we grow, we remain committed to exceptional service, anticipating and solving our customers’ evolving challenges. With our expertise, innovative solutions, and dedication, we will continue to be the trusted partner for companies navigating obsolescence in an ever-changing technological landscape.

Why Choose Flip Electronics?

At Flip Electronics, we offer more than just components—we provide certainty in an unpredictable market. By purchasing from an authorized source, you eliminate the risks of counterfeit parts and ensure you receive only authentic, high-quality semiconductors. We’ve made significant investments in inventory, so if authorized stock exists, there’s a strong chance it’s on our shelves, ready to support your needs.

While we don’t push customers toward next-generation components, we offer cross-referenced options with varying speed grades. If you’re searching for obsolete parts, we may have alternatives from the same era—also discontinued but still in stock—to help keep your systems running smoothly.

Ultimately, our commitment to lifecycle management benefits both customers and suppliers, ensuring long-term reliability and stability in an ever-changing industry.

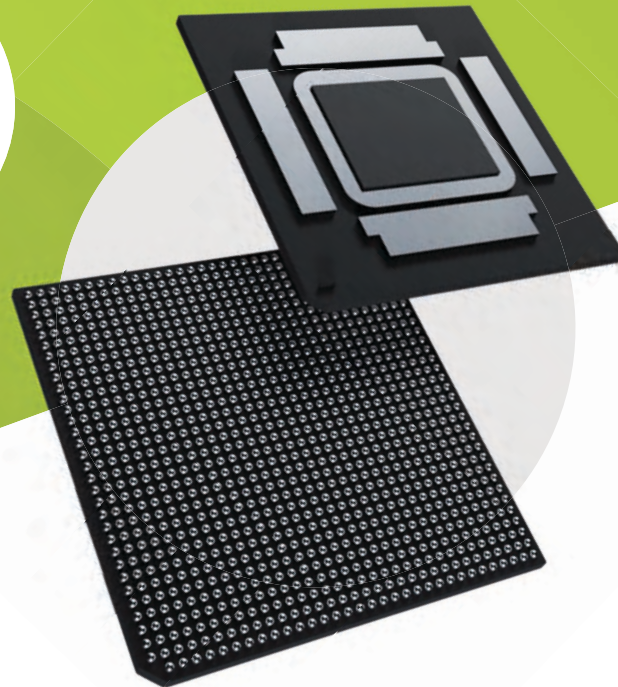
AUTHORIZED DISTRIBUTION

SIMPLIFYING PROCUREMENT, RESOLVING OBSOLESCENCE

For those seeking OEM-authorized components they can trust, the redesigned Flip Electronics e-commerce website streamlines procurement. Our global supplier partnerships ensure inventory of authorized parts, including those near end-of-life but still in demand.



**MILLIONS OF
COMPONENTS
IN STOCK**



**IN-STOCK ITEMS
SHIP SAME OR
NEXT DAY**



**BUY ONLINE AT
FLIPELECTRONICS.COM**

/ AVNET: WE'RE THERE FOR YOU

As a leading global technology distributor and solutions provider, Avnet has served customers and their evolving needs for more than a century.

We support customers at each stage of a product's lifecycle, from idea to design and from prototype to production. Our unique position at the center of the technology value chain enables us to accelerate the design and supply stages of product development so customers can realize revenue faster.

Avnet started as a radio components distributor, and we've adapted to wave after wave of technological change by expanding our capabilities to guide customers through the greatest technology advances of the last century. Today, we act as an extension of our customers' teams, and they can leverage our deep technical and supply chain expertise throughout the product lifecycle. This helps maximize their return on investment.

Avnet's regional and specialized businesses enable us to support customers and suppliers around the globe, at every stage of the product lifecycle. For example, Newark, an Avnet Company, is a global technology leader with over 80 years of high service distribution of products and technology for electronic and industrial system design, maintenance and repair.

Newark supports a broad customer base--from hobbyists to engineers, maintenance engineers and buyers--working with leading brands and start-ups to develop new products for market and supporting the industry as it seeks to develop the current and next generation of engineers. Together, Newark and Avnet can support customers across the entire product life cycle. Newark's extensive line card includes a roster of in-stock components alongside offerings to support prototype development as well as maintenance, repair and operations (MRO). In addition, Avnet delivers expertise in global component sourcing, supply chain management and inventory solutions.

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Avnet designs, makes, supplies and delivers technology solutions to customers of every size, in every corner of the world.



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Company locations:
250+



Employees:
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Units Shipped annually:
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Dayna Badhorn explains that “The possibilities for AI applications are endless, offering opportunities to enhance both internal efficiency and external customer responsiveness. By leveraging AI for customer service, product information, marketing and purchasing analytics, businesses can streamline operations and improve decision-making. Seamless connectivity with customers and supplier partners further enhances supply chain efficiency, effectiveness, and transparency, driving greater overall performance.

Badhorn shares a compelling, quantitative view of this topic from Avnet’s research. “Based on Avnet’s annual survey, Avnet Insights, Avnet found the top challenges engineers expect when considering integrating AI into their products include security and privacy concerns (37%) and data quality issues (31%). For about a quarter, integration with existing tools (25%) and high costs (24%) also are top-of-mind. Engineers also expect certain skills will help them capitalize on the immediate opportunity. The top skills engineers feel are most necessary to use AI effectively in product design include: data analysis and interpretation (16%), AI model optimization (16%), and problem-solving and critical thinking (16%).”

The holistic investment approach and whole of enterprise approach related to Artificial Intelligence at WESCO is described by Chris Wadsworth. “We have acquired dozens of companies over the last ten years. Our focus is investing in and completely connecting all of our disparate systems together to communicate across a wide range of functions that take the manual and non-value add work away and replace it with technological interfaces including cutting-edge

AI tools to bring the entire WESCO value proposition to all customers. The opportunity in the short term will be more accurate and robust supply chain data including accurate and real-time updates on dates in the product lifecycle, accurate ordering elements between the distributor and manufacturer, and automating price and availability to free up sales desks to drive customer

value. Distribution companies must manage the data across hundreds of manufactures and keeping the data fresh is a challenge to keep accurate. By having real time feeds updating the thousands of attributes will drive efficiency and the accuracy of the relationship. AI takes this effort to a new level by anticipating issues and challenges ahead of time and acting prior to an issue occurring. From



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The world’s largest continuous source of semiconductors.

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- Over 200,000 part numbers in stock
- Over 12 billion die in stock
- Over 20,000 device types manufactured
- Capability to manufacture over 70,000 device types



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Authorized Distribution | Licensed Manufacturing | Manufacturing Services

Continues on page 44



«

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Fast. Focused. Falcon.

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BEYOND CAPABLE

For over 30 years, Falcon has specialized in supporting the leaders that drive the aerospace, defense and space markets. Our extensive knowledge and proficiency with procurement processes, technical requirements, quality flow downs, and T&Cs – as well as all government procurement guidelines (FARs, DFARs, ECCNs, etc.) – is only surpassed by our focus on schedule commitment (OTD), quality (DPPM), and the highest levels of customer service.

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- Women Owned Small Business
- Aerospace Self-Release Programs – AS13001 - Certified Employees
- ESD Compliant Including Class Zero – JESD625 - Trained Operators
- Counterfeit Risk Mitigation – AS5553B Compliant
- Cyber Security – NIST SP 800-171 Compliant
 - CMMC Level 2 Certification in Process
- ECIA Member
- ITAR Registered
- AECA Compliant
- GIDEP Member
- DLA QSLD Certified

AUTHORIZED PRODUCT LINES



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a human capital standpoint, AI will drive basic information exchange between buyers and sellers by replacing the manual work that is in a system where today that work is most often achieved through manual exchanges between humans. Simple tasks, like price and availability and product substitutions and complimentary product suggestions will be driven heavily by AI, helping engineers come up with options for their designs. WESCO is committed to strategic investment in our technology stack, as we drive the best-in-class elements in our IT architecture.

Aiden Mitchell shares his observations related to AI in the following bullet points:

- “AI driven forecasting and demand planning, Enhanced supplier collaboration, supply chain visibility & transparency, dynamic pricing strategies & data analytics are all going to be key areas of focus.
- The use of AI in supply chain management is in its infancy.

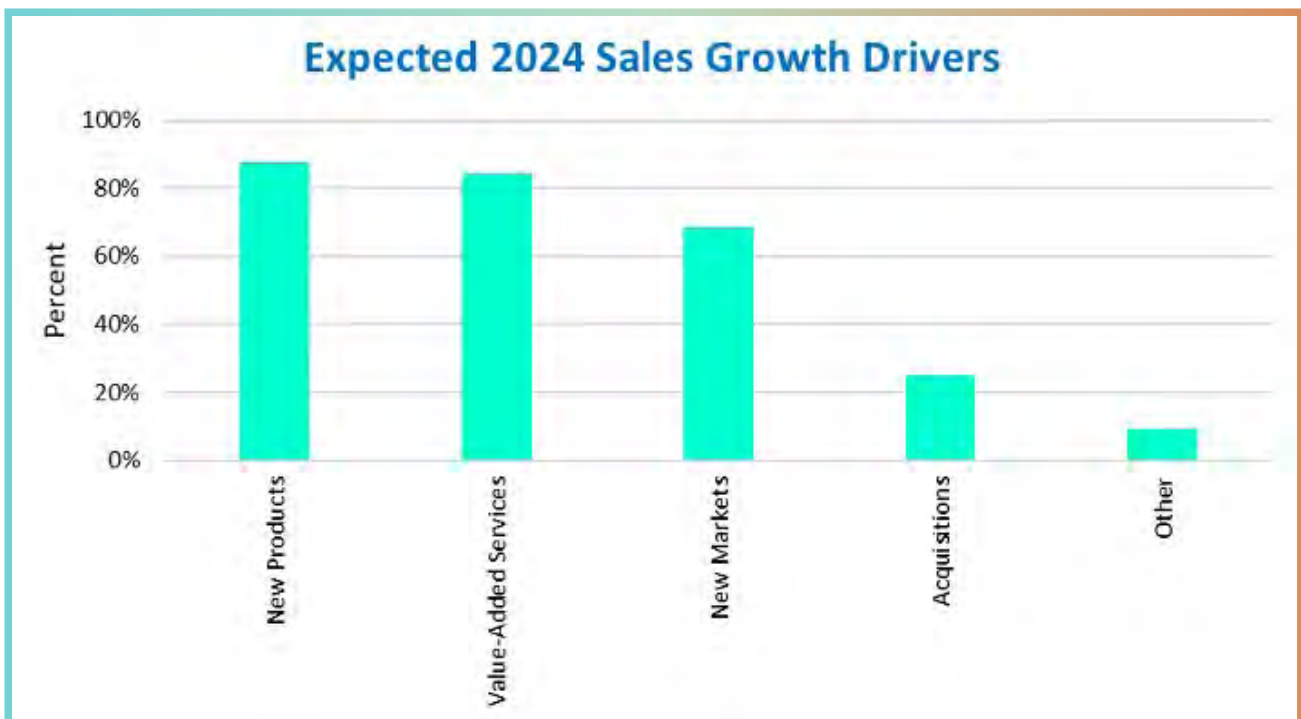
• Companies are in experimental mode locking down potential use cases.

• General themes are around automation and advanced analytics.

• Arrow is set up in many ways to help in the journey:

o Integrating data into AI processes via API or other means

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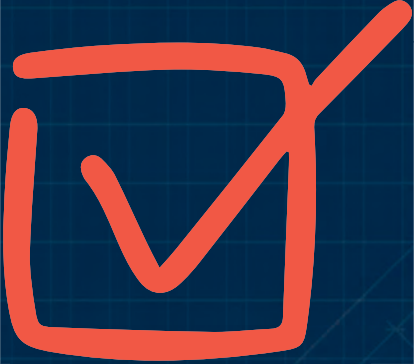
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☒ PROFICIENT

☒ RELIABLE

☒ SOLUTION-FOCUSED



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Continues on page 46

Automated order fulfillment.
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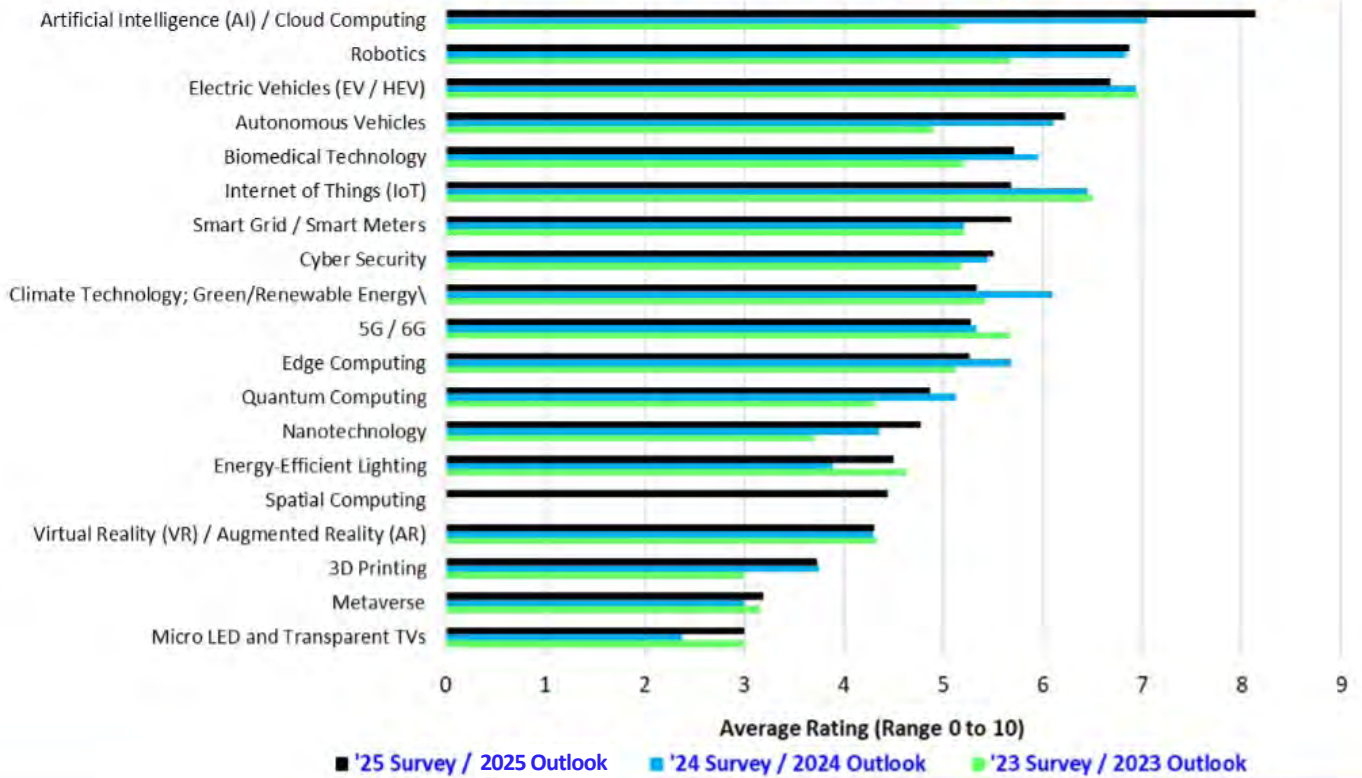
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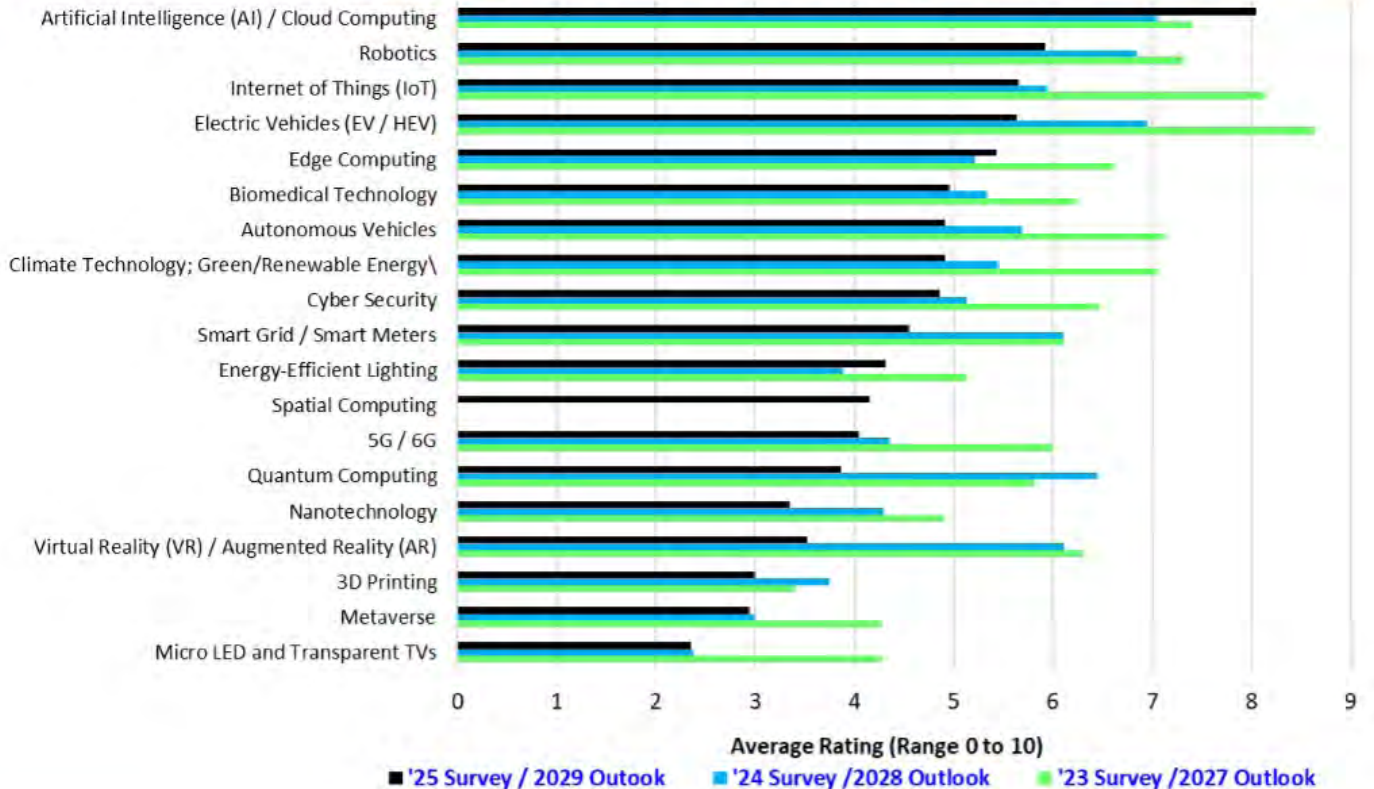
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ARROW
Five Years Out

Technology Sales Growth Driver Average Ratings - Near term Outlook



Technology Sales Growth Driver Average Ratings - Long Term Outlook



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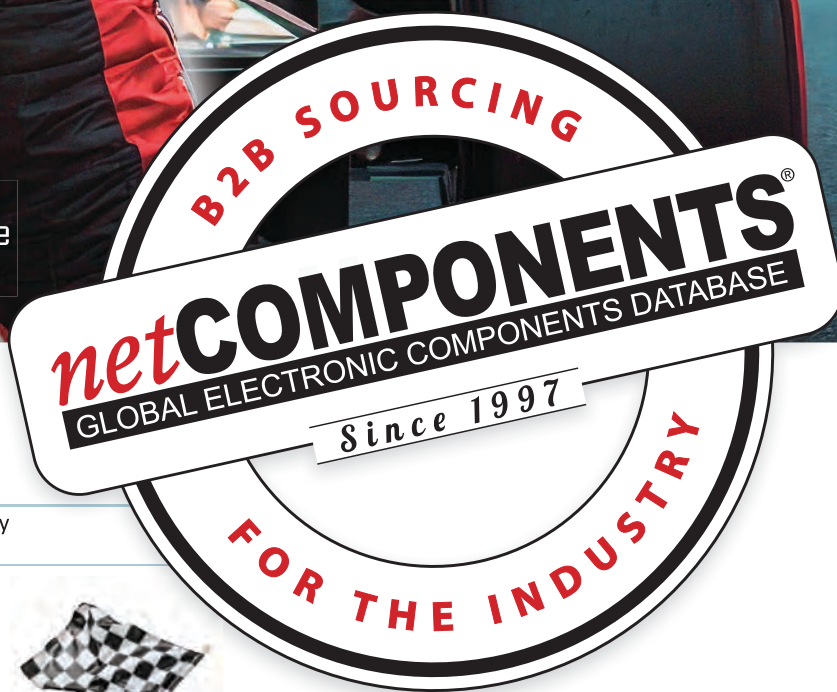
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netCOMPONENTS is a market leader in sourcing services for the worldwide electronic components industry.

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- Stocking distributors and other companies with inventory for sale are able to register and list their inventory.
- netCOMPONENTS offers a custom designed solution exclusively for component manufacturers that sell through authorized distribution called the Distributor Inventory Locator Program (DILPSM).

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bisco industries®



Company Overview

FOUNDED IN 1973

600+ EMPLOYEES

7 NORTH AMERICAN DISTRIBUTION CENTERS

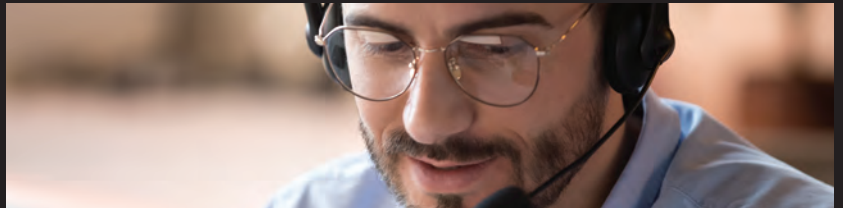
3.8 MILLION PRODUCTS

425+ SALES ACCOUNT MANAGERS

52 GLOBAL SALES OFFICES

AS9100 / AS9120 / ISO9001 CERTIFIED

bisco industries Headquarters: Anaheim, CA



History

Since 1973, bisco industries has been a premier distributor of Electronic Components and Fasteners used for production in the Aerospace, Communication, Computer, Fabrication, Industrial Equipment, Instrumentation, Marine, and Military Industries. The organization prides itself on its over 52 years of success in connecting the supply chain with excellence.



Supply Chain Resiliency

Customers depend on bisco's expert sales and supply chain teams to help mitigate risks in their production processes including material shortages and increased costs for raw goods. bisco's approach to supply chain management analyzes stock levels and usage trends to ensure strategic inventory in their 7 distribution centers, shorter lead times, and reduced costs to the entire chain. bisco's distribution centers have been tactically placed so customers have the inventory they need without the use of expedited shipping. These warehouses can be found in San Jose, CA, Anaheim, CA, Irving, TX, Chicago, IL, Atlanta, GA, Boston, MA and Toronto, Canada.

Unrivalled Support

bisco reduces customers' cost and increases efficiency in their supply chain by maintaining a local sales team, providing customized services, and housing robust inventory levels across thousands of product categories. Their team of 425 (and growing) sales representatives are located throughout 52 strategically placed offices throughout North America and internationally to best serve their local markets. Every inquiry is directed to a local sales professional, specialized in an industry vertical, who will be able to quote, provide feedback, or recommend an alternative item within four hours. When you contact bisco, you can count on speaking with a dedicated account manager who will assist you with anything from finding the right part number to tracking your order. That's the bisco difference!



A Partner for All Things Mil-Aero

Though bisco's broad catalog allows the company to serve many industries, one of its primary verticals is Aerospace and Defense. Much of the company's growth in recent months can be attributed to their ability and qualifications in catering to the stringent requirements of Aerospace and Defense customers. Their team speaks "Alpha-Bravo" with everything from MRO to large-sale-production requests and their commitment to continuous improvement has made them a staple in mil-aero procurement.



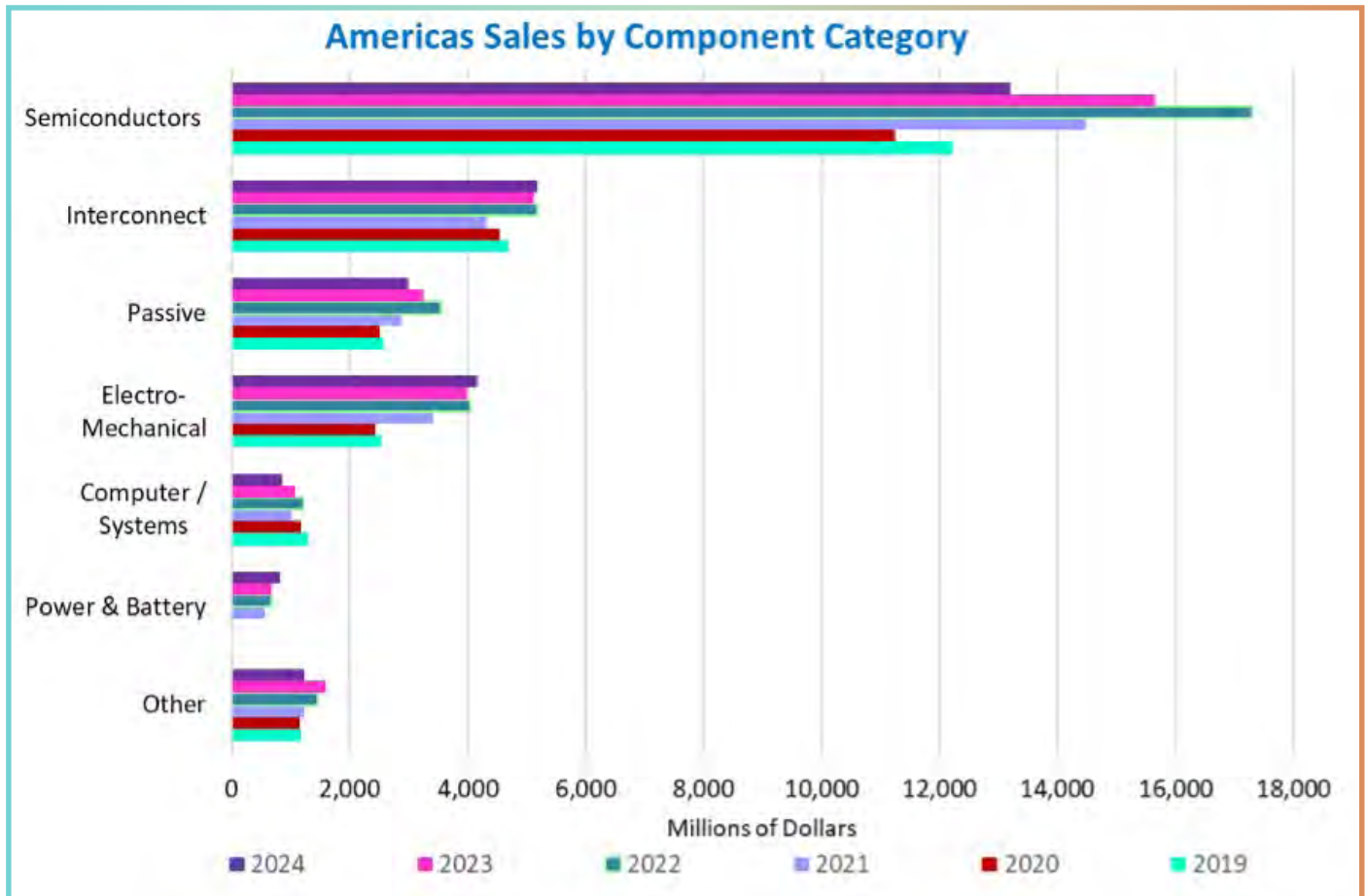
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o Proving concepts around using AI agents to support key supply chain workflows such as planning and procurement.”

Mike Slater explains how AI is core to their work. “AI is everywhere at DigiKey and we continue to stock more and more parts for AI development. We’re using AI to solve real business problems across almost every part of the company including pricing, procurement, accounting, warehousing and e-commerce. AI isn’t just a buzzword for us, it’s a core part of how we work, helping us scale, improve efficiency, and deliver a better experience for our customers.

Eco-Friendly Practices and the Supply Chain

Growing consumer and regulatory pressure for eco-friendly practices (e.g., ESG, RoHS, REACH, etc.)

demands that distributors adopt sustainable sourcing, reduce carbon footprints, and manage end-of-life components responsibly. Transitioning to green materials or recycling programs often incurs upfront costs. The growing demand for refurbished and recycled components opens new areas of opportunity and threats. The question posed to supply chain executives is, “How can distributors most effectively support eco-friendly practices with their partners in the supply chain?”

David Loftus shares this recommendation based on a key ECIA initiative, “One incredibly important opportunity is educating customers to adjust their obsolete opinion on component date codes. Many customers still cling to a 50-year-old standard that components should not be used more than two or three years after the manufacturer date code. This

creates significant waste in the supply chain, increases lead times, and snarls the supply chain. It often costs the customers significant amounts of money when they destroy perfectly good product that they deem past the usable date code. Modern electronics components in environmentally sealed packages are capable of being used indefinitely. Enlightening the extended supply chain will improve the environmental footprint and decrease costs across the supply chain.”

“While there is still much work to be done, many leaders and companies in the manufacturing industry are already collaborating and using their innovative technologies to leverage data, analytics and automation to help customers make more informed decisions, choose smarter products, implement sustainable practices, reduce greenhouse emissions and more” according to Mike Slater. He

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describes the operational practices that can make a major contribution to environmental improvements. “When considering how to optimize operations, it’s fundamental to begin by looking at material flow, industrial vision and automated robotic systems – key areas that are helping move the industry toward a more sustainable future. Optimizing material flow within and between facilities minimizes transportation distances, reduces fuel consumption and lowers emissions. In our warehouses, DigiKey uses automation to increase productivity, utilize space better and maintain inventory accuracy in our distribution center. We also bundle orders to save on packaging, space and freight costs when shipping products. Every sustainable action or practice put into action adds up from an environmental perspective.”

Adam Osmanec provides an excellent description of a comprehensive approach distributors can take to support environmentally friendly solutions in the supply chain. He outlines this approach below:

Promoting Product Transparency

- “Empowering our partners to understand the environmental impacts of the products that they purchase empowers those partners to factor things like product carbon footprint or recycled content into their purchasing decisions
 - Leveraging a robust supplier engagement program to collect product information – in addition to implementing sustainability questions within sourcing processes – is a highly effective tool in increasing the dialogue and, therefore, this product transparency
 - At Arrow, we also leverage our broad network of suppliers to inform things like our SiliconExpert database where we house information for millions of components, including things
- like carbon emissions related to the manufacturing of products
 - Distributors should also encourage partners to consider life cycle assessments (LCAs). These tools assess the environmental impact of a product across its lifespan from manufacturing to disposal
 - o Investments in LCAs can pinpoint products that require decarbonization or products that may be candidates for inclusion of recycled content

Decarbonizing the supply chain – from manufacturing through distribution and end-of-product life

- As a distributor, decarbonizing our own operations first demonstrates to our partners that this can be done and that we are joining them together on this environmental journey.
- We have focused on energy efficiency, electrification, and renewable electricity deployment within our own operations. We do this in a way that prioritizes environmental impact while leveraging cost-effective solutions
 - o Cost-effective solutions include prioritizing energy efficiency in high-cost electricity markets where the payback is short and electrifying assets at the end of their useful life
- We can leverage this playbook to support our partners as they do the same.
- Additionally, distributors should encourage partners to think about emissions - and costs - across the entire product life cycle
- As an example, recycling material can be energy-intensive and expensive, but may potentially be less energy intensive and expensive than sourcing and processing raw material, with

the added benefit of reducing the net environmental impact

- Distributors can play a key role in reducing transportation and distribution emissions through optimizing logistics using efficient warehousing, route planning, and consolidated shipments.

Supporting Infrastructure for Impactful Recycling

- Distributors can engage with suppliers and customers to understand which materials hold the highest value and/or present the greatest environmental risk
- Supporting consumer transparency around which materials or components are prioritized for recycling may change consumer preferences / habits
- Distributors, like Arrow, have the opportunity to create streamlined returns, and reverse logistics, channels that support e-waste and high impact material collection
- We also can promote the existing e-waste recycling, product buy-back, trade-in or hardware-as-a-service programs of our customers
- We also should prioritize logistics channels that are powered by low-emission modes of transportation, like EVs, ocean freight, or rail, to reduce the carbon footprint of e-waste recycling infrastructure
- Incorporating education and resources into supplier engagement programs to increase awareness of the financial and environmental opportunities of optimizing material recovery and extending product lifecycles.”

What Does the Global Market of the Future Look Like?

The volatile global trading environment and the threats

Continues on page 54

Transfer Multisort Elektronik is a multi-generational company, operating since 1989.

For more than 30 years, we have been growing steadily, gaining experience and becoming one of the most dynamic global distributors of electronic and electrotechnical components, workshop equipment and industrial automation solutions. Our offer includes a total of over 1 000 000 products, most of which are available immediately thanks to our excellent distribution center located in Poland.

TME's presence in North America

TME, headquartered in Poland, operates 11 foreign subsidiaries worldwide. In 2020, TME US, LLC commenced operations in Atlanta, bringing together the strengths of a dynamic, US-based team with the extensive expertise of a global distributor that has been a leader in the electronic components market for 35 years. We established our US office to ensure outstanding customer service despite the challenges posed by time zone differences.

Enhanced shopping experience

TME is more than just an online shop. We aim to be an efficient and helpful business partner for our customers, and to that end we offer a number of practical solutions.



Local office support

For local support, our American Sales Department is available 5 days a week.



Wide choice of electronic components

Our catalog features over 1 000 000 products.



Quality guarantee

We control the quality of the products in our stock regularly. The products which require special storage conditions are kept in areas with adequate protection.



Special offers

We accommodate the delivery of custom orders tailored to non-standard quantities or specific product parameters.



Fast Shipping

Our advanced logistics, cutting-edge packing systems, and top freight forwarders enable us to process and dispatch orders within 24 hours.



EDI, Punchout, API & Product Feed Integration

Integrate your corporate software with the TME platform to optimize and enhance your operational efficiency.



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We provide order consolidation services, ensuring your shipments are dispatched together either on your specified date or according to a pre-arranged delivery schedule.



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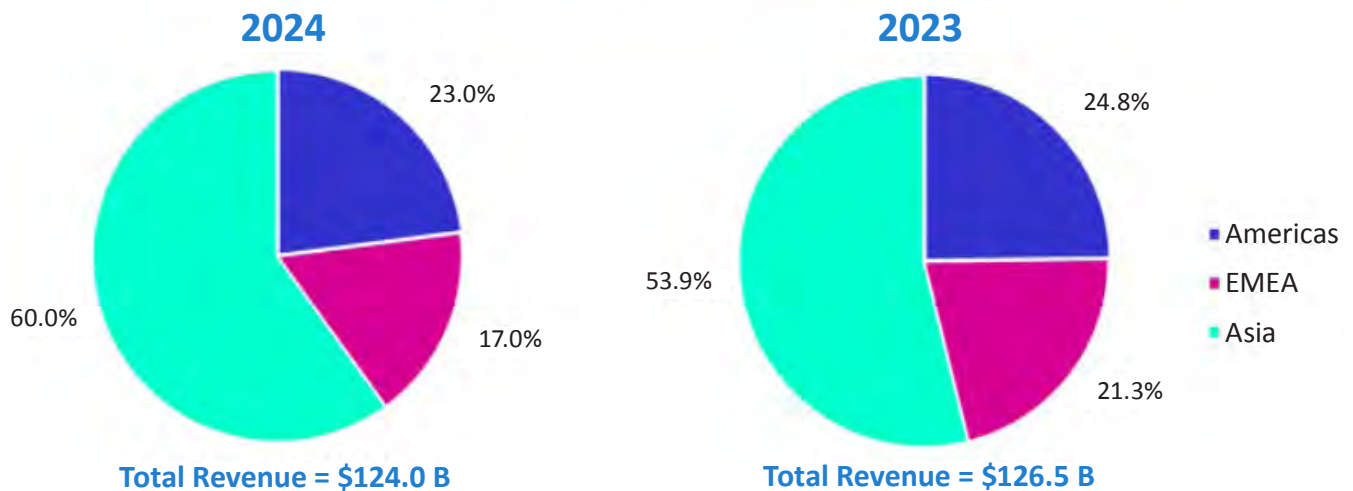
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Top 50 Total Revenue Share by Region



to the supply chain raises the following questions as the global “free trade” market is challenged. What types of opportunities are developing in “emerging” regional markets such as Latin America, Africa, and Asia? Is investment in these emerging markets worth the trade-off in diverting resources from larger markets in the U.S., Europe, China, Japan, and other developed Asian countries?

David Loftus cuts to key issues that must be assessed in answering these questions. “This is a risk/reward equation. Suppliers and distributors normally invest as demonstrated revenue grows. But with the imposition of tariffs creating an international trade war, pockets of opportunity will arise that can benefit the bold companies that invest ahead of the curve. The trick will be finding those countries that have the necessary infrastructure, resources, and personnel to increase their home-grown electronics businesses.”

Adam Osmanec points to one region of opportunity. “One exciting opportunity is the “Make in India” program which aims to promote indigenous manufacturing across sectors, including electronics. With a focus on reducing imports, boosting exports, and creating jobs, the initiative has brought strategic policy reforms and infrastructure development to support the electronics industry. We’ve seen more and more semiconductor suppliers establish design centers across the region as well as industrial OEM’s create outsourced design centers to leverage the opportunity as these engineering teams augment their onshore teams.”

Continues on page 58

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6 Ways Braemac Supports Your Engineering Journey

With 40 years of global expertise distributing semiconductor components and electronics systems, complemented by value-added services—Braemac, a Division of the Exponential Technology Group, Inc. (XTG), understands the challenges engineers face:

- Sourcing components
- Managing logistics
- Ensuring seamless integration

Offering a comprehensive design and supply-chain solution, Braemac's **value-added services aim** to streamline development, reduce costs, and accelerate time to market.

Our approach to value-added services:

- 1. Turnkey Design** – From initial schematics to final testing, our in-house engineering team delivers customized solutions to meet your project's specifications.
- 2. Kitting & Logistics** – Forget supply chain bottlenecks. We source your BOM and manage inventory to ensure on-time delivery.
- 3. Assembly & Sub-Assembly** – Regardless of whether you need a full turnkey solution or sub-assembly support, we integrate all electronics into enclosures, ready for deployment.
- 4. Programming** – We pre-program parts before shipment, enhancing security and simplifying high-volume production runs.
- 5. Customization** – We tailor components to fit your project's unique requirements.
- 6. Reballing** – Optimal for defense and aerospace applications, we will replace lead-free solder balls with leaded ones for precision Ball Grid Array, Chip Scale Packages, and similar packages.

Braemac is a **proud member of XTG**, operating within an ecosystem of specialty semiconductor distributors and engineering design services firms. XTG stands alongside Mouser Electronics and TTI IP&E as part of the TTI Family of Specialists. Our strategic positioning within

XTG further enables our ability to offer global distribution and value-added services—ensuring you have the expertise, resources, and supply chain reliability you need at every stage of your project.

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Contact Us 

ALL TECH ELECTRONICS

simplifying DISTRIBUTION

Named one of the Top 50 U.S. Electronics Distributors for four years running, All Tech Electronics celebrates more than 30 years of providing customers with mil spec high-reliability electronics for Defense, Aerospace and Satellite applications. Whether they are delivering off the shelf components to their customers or helping design solutions for non-standard or obsolete products, All Tech's management brings decades of experience into play.

The All Tech founders are all lifetime students of the electronics industries they serve, having witnessed always evolving innovations during the last 40 years. Their combined knowledge and key relationships with important suppliers have driven a successful business model in the DAS market they serve. Specialization and an experienced staff monitor key market metrics to assure All Tech's customers have a thorough understanding of current market trends.

A Franchised MBE Distributor

All Tech's unique position as a franchised distributor and a Minority Business Enterprise (MBE) affords their customers the ability to meet the requirements of their Small and Minority Business Enterprise goals. Customers utilizing All Tech to supply diodes, transistors, integrated circuits, MPU and memory products provides their customers with an MBE business partner that doesn't require them to compromise quality or price. Their products meet the highest reliability standards – M19500, JAN, JANTX, JANTXV, JANS, 38510 and 5962 managed in a fully compliant, audited ISO 9001 and AS9120 quality system further securing All Tech's place among the top U.S. electronics distributors.

Space Capabilities

With the explosion of manufacturing for space, All Tech has kept pace and supplies customers with packaged devices that are ideally suited to space and rad hard applications. While they have always supported JANS level diode and transistors as well as RF, Microwave and Power Magnetics products they have recently expanded their product portfolio. Included in that offering are logic, interface, and translation ICs, in all form factors up to and including 300 KRAD. Additionally, they have added MRAM products with space and military quality flows and leading-edge power solutions dedicated for high-reliability applications including Gallium Nitride (GaN) technology solutions. Their Point-of-Load (POL) products combine multiple load capabilities, outstanding radiation performance with high levels of integration and easy to use features.

Custom Packaging

Clients of All Tech Electronics can get parts exactly the way they want them without having to source from multiple providers. There may be cases, for instance, when an engineer wants the functionality that a standard part offers, but it just doesn't fit their application properly. That's where All Tech's engineering team comes in.

Obsolescence Management

Because it can be years from design to production, All Tech offers a full range of services to help clients minimize the impact that rapidly changing technology can have on their end products. As a full service DMS/Obsolescence solutions provider All Tech delivers all the necessary tools to solve and manage ongoing DMS challenges. Product packaging and assembly as well as die, wafer and package-level testing and up-screening are among the most-requested services. Full traceability and certification eliminate any concern of procuring counterfeit product.

Value Added Services

Component modification and testing needs vary widely. All Tech Electronics provides services to the highest standards: MIL-PRF-38534 & MIL-PRF-38535

For solder coverage:

- GEIA-STD-0006 – requirements for robotic solder finish on electronic components
- IPC/ANSI J-STD-001 – for trim and forming and hot solder dip
- IPC/ANSI J-STD-002 – for solderability test
- ANSI STANDARD EIA-481 – for tape and reeling

Material Management

Carrying a fully furnished inventory is often costly, but having to contend with a possible re-design can be much more expensive. All Tech offers their customers a continuing supply of diminishing manufacturing source (DMS) material through a number of managed Wafer and DIE banking arrangements.

Cybersecurity

All Tech Electronics supports and is compliant with the governing regulations and standards covering industry-wide cybersecurity protection. We are currently working toward CMMC compliance. Cybersecurity compliance including:

- DFARS 252.204-7012, Safeguarding Covered Defense Information and Cyber Incident Reporting
- NIST 800-171, Protecting Controlled Unclassified Information in Nonfederal Information Systems and Organizations.

All Tech Electronics can be reached at (914) 592-7726 or via their website: www.alltechelectronics.com

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simplifying DISTRIBUTION

30
YEARS

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- M19500 - JAN, JANTX, JANTXV, JANS SX, MX
- M38510, 883, DESC/SMD, 5962, Rad Tolerant, Space
- MIL-PRF-38534 & MIL-PRF-38535
- GEIA-STD-0006 — For robotic solder finish on electronic components
- IPC/ANSI J-STD-001 — For trim and forming and hot solder dip
- IPC/ANSI J-STD-002 — For Solderability Test
- ANSI STANDARD EIA-481 — For Tape and Reeling

All Tech Electronics Headquarters:
8 Skyline Drive, Suite 280
Hawthorne, NY 10532
(914) 592-7726

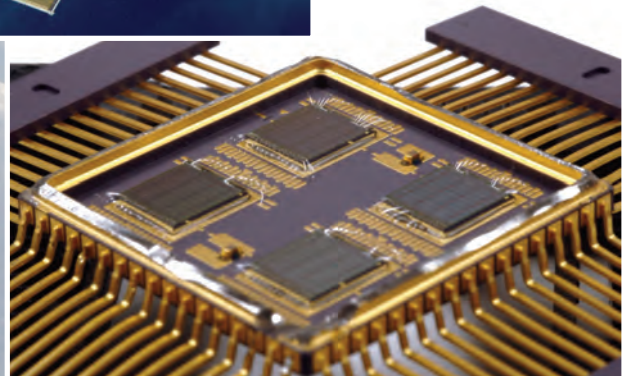
West Coast Office:
22800 Savi Ranch Pkwy, Suite 206
Yorba Linda, CA 92887
(714) 363-3608

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- DISTRIBUTION SERVICES
- CUSTOM PACKAGING
- OBSOLESCENCE MANAGEMENT
- VALUE ADDED SERVICES
- MATERIAL MANAGEMENT
- SPACE CAPABILITIES

Since its founding in 1993, All Tech has developed a diverse network of partners to give our customers the best of both worlds – access to the comprehensive resources they need combined with the flexibility and service only a small business can deliver.

Simplifying distribution.



JESD 31 AS9146
JESD 625 AS5553
AS6496

ECIA Top 50 Americas Authorized Distributors Report 2025

Mike Slater emphasizes localization efforts that will be important in the evolving global environment. “We’re seeing more manufacturers adopt a “China+1” strategy, increasing demand in Malaysia, Vietnam, and Thailand, so we’ve invested in localization efforts there. At the end of the day, our goal is simple: meet customers where they are and make it as easy as possible to do business with DigiKey.”

Seeking and Supporting Multi-Generational Talent

The never-ending challenge for all business is the cultivation of a motivated, productive team. This presents key questions such as How do you see successful labor management processes continuing to evolve? Is the challenge of new talent recruitment improving? How are companies successfully promulgating the company culture across an increasingly diverse and distributed workforce?

Dayna Badhorn emphasizes culture as fundamental. “Culture starts at the top, making it essential for management to align with the company’s core values and mission. This alignment should be consistently reinforced in meetings to ensure employees

understand these principles and their impact. Highlighting examples of employees embodying core values further reinforces their importance, bringing them to life through real-world actions.”

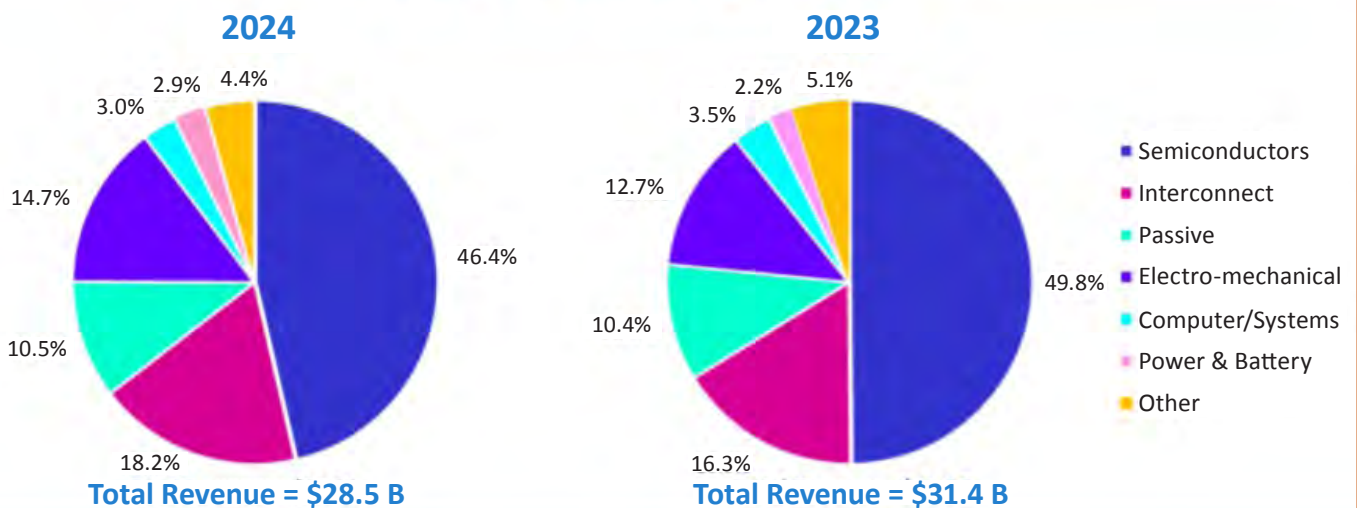
Mike Slater highlights strategies implemented at DigiKey as they support their teams with new technologies and encourage out-of-the-box thinking. “Since we’re based in Thief River Falls, a town of fewer than 10,000 people, we’re investing in innovative ways to scale, like:

- Warehouse efficiency: We’re working with suppliers on Advance Shipping Notices (ASNs) to speed up receiving and repositioning inventory so it can be picked and shipped faster.
- Call center improvements: We’re making it easier for customers to self-serve for things like schedules, backorders, and expediting while also ramping up API/EDI ordering and predictive messaging.
- Back-office automation: We just rolled out cutting-edge Oracle tools to modernize billing, accounts payable, and receivables, making these processes more seamless.”

Slater continues, “One of DigiKey’s core strategies is to be as localized as possible. We have dedicated regional teams in EMEA and APAC that manage performance in their markets and localize customer experience. In terms of company culture, we strive to create a culture where people feel encouraged to think differently, challenge assumptions, and experiment with new approaches. At DigiKey, we try to model innovative thinking in the following ways:

- Encouraging curiosity: We strive to foster a mindset where team members ask, ‘What if?’ and ‘Why not?’ instead of sticking to the status quo. This has been a significant part of DigiKey’s growth history and is part of what makes us an industry leader. Creating an environment where questions are welcomed allows new perspectives and creative solutions to emerge.
- Embracing smart risks: Innovation requires trying new things, even when the outcome isn’t guaranteed. DigiKey constantly experiments across all business units and levels of the organization. This mindset has helped us stay ahead in rapidly changing market conditions.

Americas Revenue Share by Component



ECIA Top 50 Americas Authorized Distributors Report 2025

- Collaborating across teams: This is the key attribute of innovative thinking. By breaking down silos and encouraging cross-functional teamwork, we create an environment that drives diversity in thinking to generate ideas and solve problems more effectively.

“Creating this type of environment as part of our everyday work has clear benefits. It leads to finding smarter, more efficient ways to serve our customers. Our environment also drives engagement, as team members feel empowered and motivated when they know their ideas matter.”

Aiden Mitchell breaks these questions down individually to address them:

- “How do you see successful labor management processes continuing to evolve?”
 - o Companies will have to become more people focused. Companies must truly be willing to invest in employees through career development, upskilling, and employee engagement. This will improve retention and productivity which will result in stronger teams and better output. AI and technology are evolving fast, which means job functions are shifting, and companies (leaders) must make sure employees feel valued and supported throughout a rapidly evolving tech landscape.
- Is the challenge of new talent recruitment improving?
 - o It’s still a challenge. AI and other tech advancements have helped recruiters by streamlining processes and improving the candidate experience, which in turn strengthens a company’s brand. But the competition for top talent is still fierce, and companies need to be proactive in setting themselves apart. People want to work for companies that offer competitive pay, flexibility,

career growth, a positive culture, and a strong brand - all these things come together to recruit and retain top talent.

- How are companies successfully promulgating the company culture across an increasingly diverse and distributed workforce?

- o It all starts with strong leadership. Employees need to see it to believe it. That’s why it’s so important for leaders to be collaborative, transparent, and genuinely respectful of everyone. Leaders who genuinely care about their team and the work their team is doing will reinforce the positive culture that is intended across a diverse population. Leaders should recognize individual contributions, team contributions, remove roadblocks and set people up for success and recognition. All of this contributes to a strong company culture across a distributed workforce.”

Chris Wadsworth describes the challenges they face in recruitment and the solutions they are pursuing. “Many companies have adopted creative programs to attract the generations post Gen X into their companies. The electrical and electronic industry provides very high growth prospects over the next ten plus years and younger people are starting to notice and come into our industry, but I would say we are still struggling to recruit the next generation at the same rate as the boomers are retiring. Some creative ideas include leadership development and mentoring programs as well as offering specialized business resource groups to serve outside of the normal day-to-day business in the communities around the country and then simple things like positive recognition. For example, one of our business groups is centered around training and attracting skilled employees that are either veterans or those with military backgrounds and we are seeing increased success year-over-year. A positive and winning

culture is the ultimate goal, and talent management is a core tenant to our long-term strategy at WESCO.”

2025: Year of Opportunity or Caution?

A recent article on the electronics industry proclaimed, “2025 is a year for caution.” Is this a year for caution or should players take the initiative in aggressively pursuing new opportunities?

David Loftus shares his opinion that “Most companies will wait until the dust settles on Trump administration decisions on tariffs. The back-and-forth with many countries on many technologies, the volatility of decisions that are changed on a day-to-day basis, will motivate most companies to be conservative until the world economic picture clears up a bit.”

“At DigiKey, we know 2025 will be a dynamic year, and while the market may be flat overall, we’re confident in our ability to navigate the challenges ahead” stated Mike Slater. “We’re making targeted investments in inventory, technology, and regional expansion to ensure we stay agile and continue delivering value to our customers. While there’s still some uncertainty in the market, our focus remains the same: providing the widest selection, the best service, and the smartest solutions to help our customers succeed, no matter what the year brings.”

Chris Wadsworth summarizes WESCO’s strategy in this environment. “Although 2025 started with a new political administration driving many changes, the secular trends driving the electrical and electronic industry are still in play and provide a very strong outlook over the next five to ten years. WESCO is taking the initiative to really lean into these secular trends (electrification, on shoring, alternative

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ECIA Top 50 Americas Authorized Distributors Report 2025

energy sources, grid modernization and AI, including data centers) and we see 2025 being a solid year for growth. Opportunities do need to be strategically vetted with the policy changes and inflationary characteristics, but the momentum of our strategic initiatives are focused on investment into growth. This growth will be enhanced by offering additional services and solutions to drive share across the existing and new customer base addressing the customer's individual growth goals, needs and expectations."

Aiden Mitchell states simply and bluntly, "Yes, we are aggressively pursuing new opportunities."

The Top 50 Americas Authorized Distributor survey results

Before presenting the results for 2024 (page 68) it is important to highlight key areas of methodology followed in preparing this report.

1. Only "Authorized Distributors" are included in the research and rankings. This is consistent with ECIA's mission to support the Authorized Channel. As a result, brokers and others are not included, and they have been replaced by authorized distributors in the Top 50 rankings.

2. The revenues reported for Arrow Electronics are limited to include only their revenues associated with electronic component distribution. For Arrow Electronics this corresponds to their "Electronic Components" division.

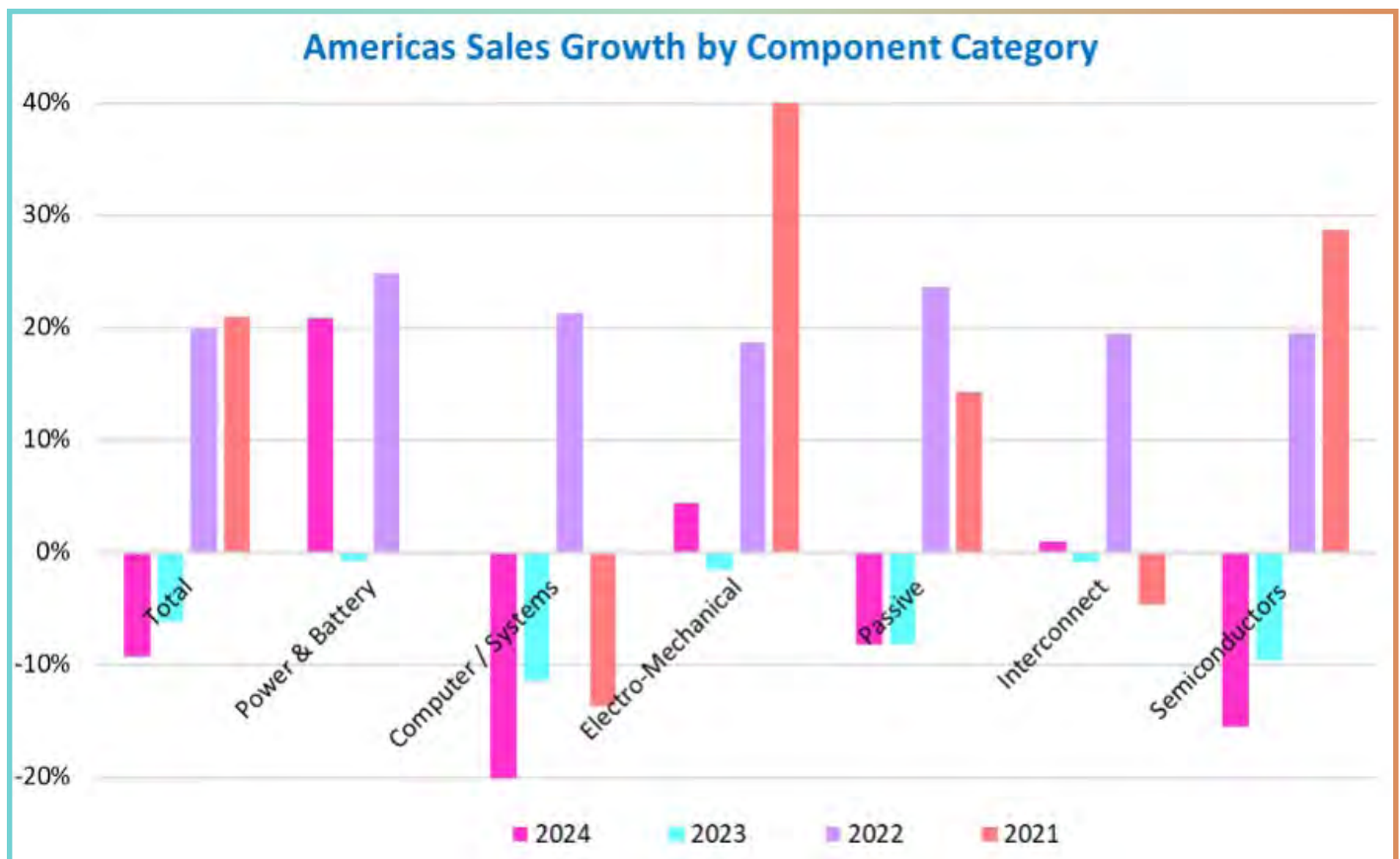
3. In some cases, companies have not provided inputs in all areas of the survey. Where companies did not provide inputs for Worldwide or Americas total revenues, estimates have been developed based on inputs from various sources. Where splits for revenues by component category or end market were not

provided, estimates were developed based on various inputs and models. The market share research is an ongoing work in process as feedback enables refined estimates.

Total Americas revenue for the Top 50 authorized distributors in 2024 declined by -9.3% to \$28.5 B from \$31.4 B. This same group of Top 50 companies saw their combined worldwide revenue fall by -2.0% from \$126.5 B to \$124.0 B between 2023 and 2024. Worldwide revenues were boosted by the Asia/Pacific region with a rebound in growth of 9.1%. On the other hand, EMEA revenue fell sharply by -21.7% last year. The Americas share of global revenues for these 50 companies fell from 24.8% in 2023 to 23.0% in 2024.

Americas revenues for the Top 50 distributors grew for three component

Continues on page 64



Cloud collaboration brings real-time intelligence to electronics sourcing

Altium's head of SaaS product marketing, Justin Sears, explains how together, Octopart and Altium 365 underpin strategic, prompt and compliant procurement

According to research by Levison Enterprises, 'more than 70 per cent of the electronic components used in printed circuit board assembly will become obsolete before the system is even installed'.

Part obsolescence hits hardest when sourcing teams become disconnected from the electronics development process. Innovation and complexity are accelerating, whether sourcing teams buy for the automotive industry, aerospace, medical devices or other industries.

However, buyers use technology that hasn't kept up, and they fear that old systems will delay product launches or cause them to buy sub-par components. Altium offers the Octopart electronic part search engine and Altium 365 electronics development platform. Together, they give sourcing teams the real-time intelligence they need.

Think about cost management strategically

Procurement leaders need to reduce the cost of each individual bill-of-materials (BoM), while also thinking strategically about cost efficiency across all projects—from prototype to production. This means constantly monitoring price changes, availability, distributors and end-of-life dates.

Without supply chain intelligence woven into the development process, events force reactive purchases. Clayton Christensen, author of

The Innovator's Dilemma, famously wrote: "Most people think of strategy as an event, but that's not the way the world works." With Octopart woven into a coherent product development and procurement strategy, buyers align to 'how the world works'.

One Octopart user describes its strategic value this way: "I have Octopart open all day, using it at least five times daily to check stock, costs, alternative packaging and datasheets. When lead times are tight, Octopart is a lifesaver, helping me quickly find alternates available for immediate procurement."

'Shift left' to prepare for supply chain uncertainty

In 2023, more than 111,000 electronic parts went obsolete without a PCN number (according to Converge, an Arrow Company). Coined by software engineers, the term 'shift left' means starting as many tasks (like user acceptance testing) as early in the development process as possible. Octopart helps buyers act with more agility as they 'shift left' their purchase processes and make decisions earlier.

The following infographic shows stages where earlier supply chain visibility with Octopart and Altium 365 helps protect teams from PCB respins, rushed purchases or choosing parts with higher fraud risk.

Future of procurement is data-driven and agile

Remember the goal. Purchasers need laser-like supply chain vision that penetrates schematics, PCB designs, mechanical enclosures and PDFs to see every part.

Octopart is the electronic part search engine that gives procurement professionals laser-vision and a superb user experience. When users load their BoM to the Octopart BoM Tool, it analyzes their component selection for cost, availability and lifecycle targets. Cloud-based access to verified supplier information, compliance data and alternate parts dramatically improves users' supply chain intelligence. Explore how Octopart and Altium 365 can make electronic purchasing teams data-driven and agile.

www.octopart.com





The industry leading search engine for electronic components

More than 20 million annual users trust Octopart to find, compare and select components.

- Real-time stock and pricing information
- Lead-time, lifecycle status and package information
- Inventory history
- Stock alerts
- Intelligent BOM tool

The largest component database from 679 distributors and 11,130

AVAILABILITY:
10,486 IN STOCK

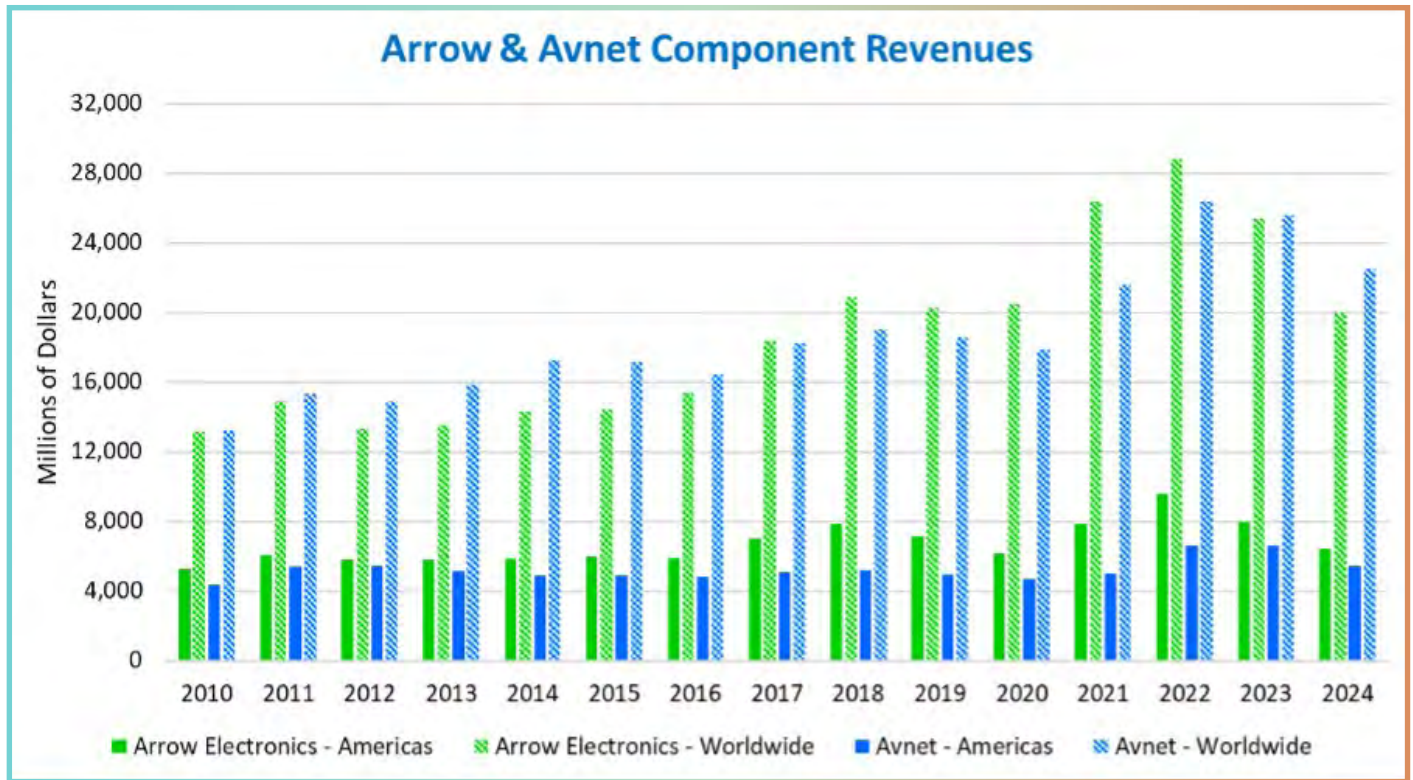


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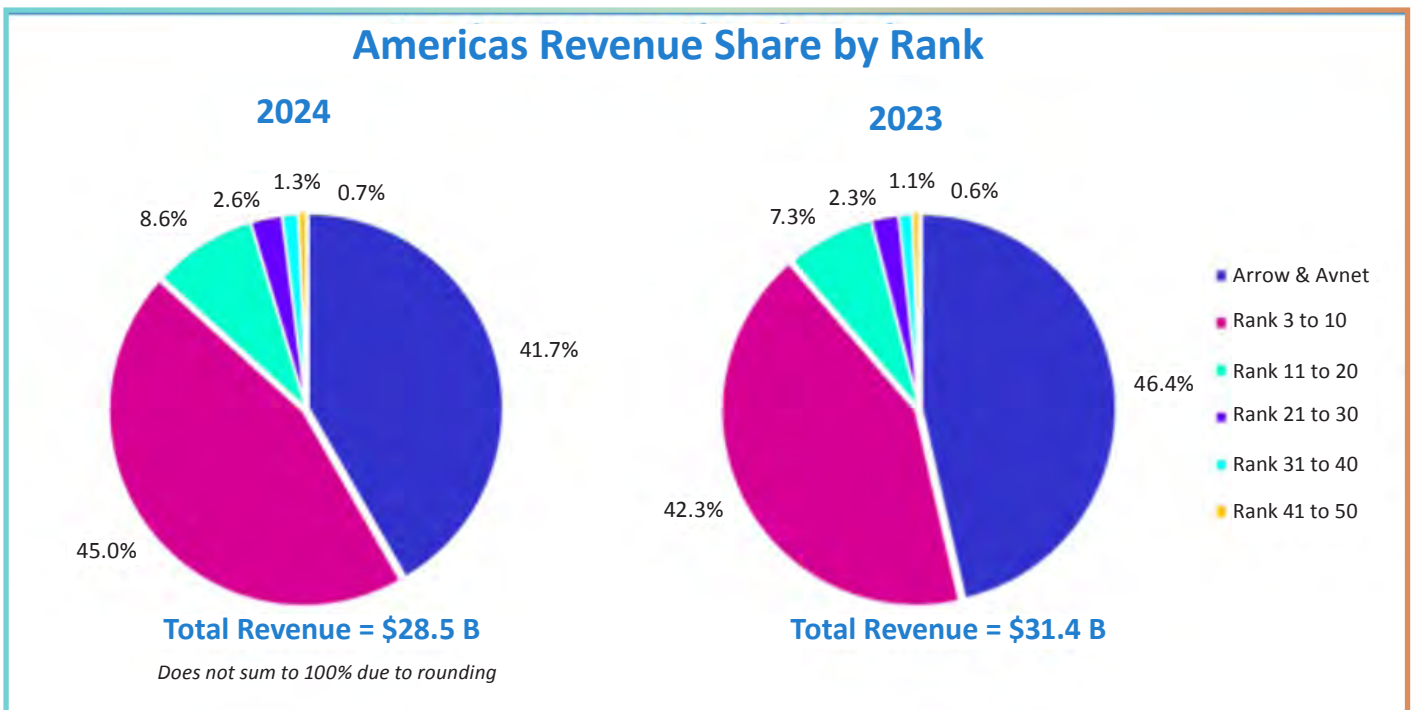
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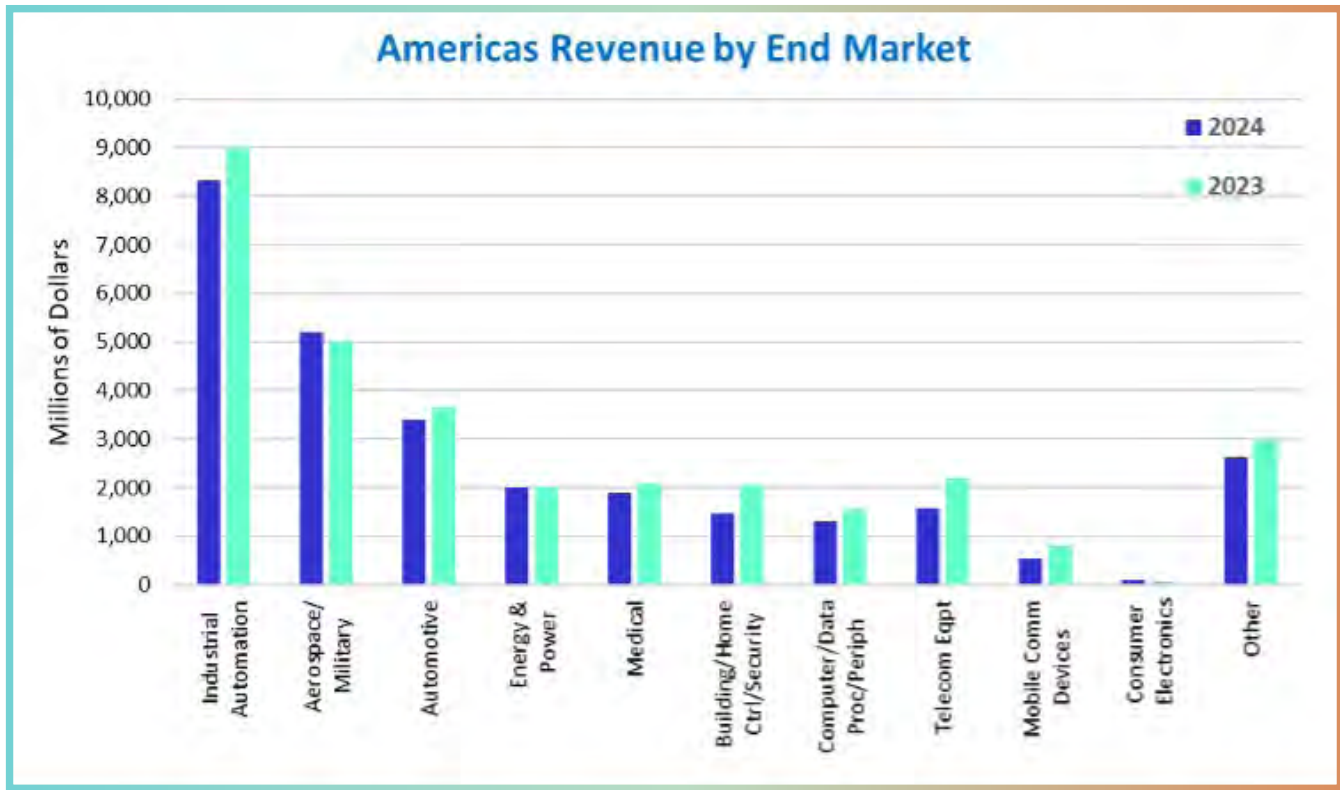
categories in 2024 lead by Power & Battery, once again, with 20.8% growth followed by Electro-Mechanical Components with 4.4% growth and

Interconnect Components at 0.9% growth. The largest component category, semiconductors, saw its share of the total Americas market

slip again from 49.8% to 46.4%. Over the five-year period from 2019 to 2024 total Americas distribution revenue grew by 3.1% Compound Annual



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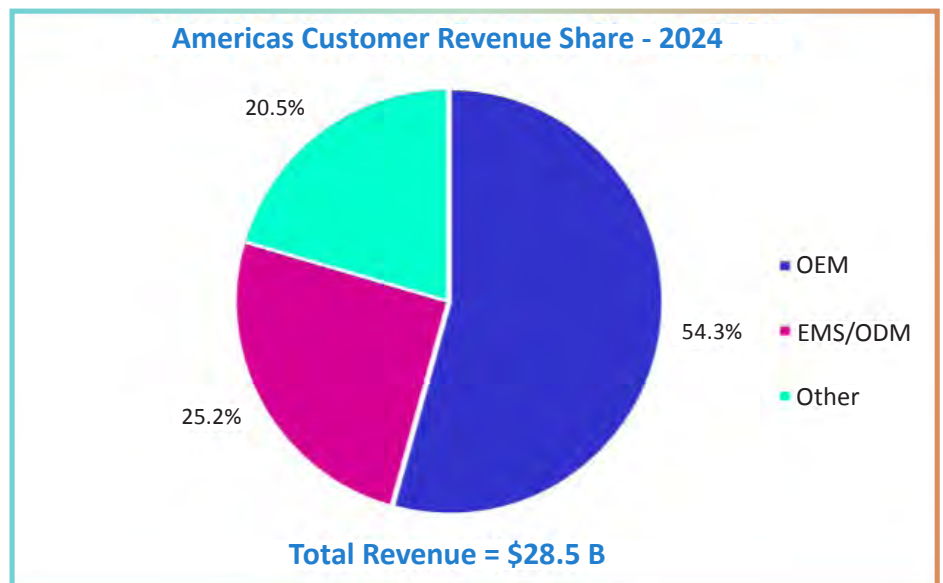
Growth Rate (CAGR) with Electro-Mechanical components leading the way followed by Passive Components at 10.4% and 3.1% CAGR, respectively. Semiconductors grew by 1.6% CAGR and Interconnect components achieved 2.0% CAGR growth. Power & Battery was added as a separate category for the first time in 2021.

average revenue for companies ranked 11 through 50 was \$95 M. Once again, the largest end-market segments for Americas distributors in 2024 were Industrial Automation, Aerospace/Military, and Automotive, accounting for 29.3%, 18.3%, and 11.9% of the market, respectively. However, the market is fairly diversified with

even the smallest segment, Consumer Electronics, driving \$106 M in revenues in 2024. OEMs continued to be the largest customers of distributors with 54.3% of total Americas revenue.

Continues on page 68

The top two North America Distributors, Arrow Electronics and Avnet both saw significant declines in their Americas revenues in 2024. Arrow Electronics sales fell by -19.4% while Avnet's fell by -17.5%. Both Avnet and Arrow experienced revenue declines on the global stage also. Avnet saw their worldwide revenue decline by -12.1% and Arrow Electronics fell by -21.4%. The Top 10 companies in 2024 with revenues of \$24.7 B and a combined revenue share of 86.7% saw their revenues shrink by 11.3%. By comparison, companies ranked between 11 and 50 with combined revenues of \$3.8 B and combined market share of 13.3% saw their revenues grow by 6.4%. Average 2024 revenue for the Top 10 companies was \$2.5 B while



The Value of Specialization in RF & Microwave Distribution: RFMW's Highly Skilled, Technical Sales & Marketing Team

Teaming up with an organization that features a highly skilled, experienced, and technical sales and marketing team is essential for sourcing optimal components and reducing operational costs and time to market.

Today's buyers and engineering teams are faced with a complex set of obstacles that must be addressed to achieve innovation. From supply chain disruptions, component availability, quality control and component reliability, price volatility, and sourcing the right parts, industry professionals are met with seemingly insurmountable challenges.

At RFMW, we're a specialized partner with thorough knowledge of the industry's complexities. We leverage decades of experience, applications know-how, and an unparalleled team of technical experts to deliver substantial value to our customers.

The Impact of RFMW's Specialized Expertise

Successfully supporting RF & Microwave components and power conversion & management solutions demands specialized technical expertise, comprehensive inventory, and extensive market knowledge.

RFMW is far more than just a distributor—we're a strategic partner for customers, offering:

Technical Sales Expertise: RFMW's team of sales experts understands

the complex performance trade-offs of RF & microwave and power components. Our team ensures optimal solutions for customers for their unique requirements and applications.

Design & Application Support: From component engineering to design-in support, RFMW provides hands-on technical assistance that accelerates time-to-market for innovation. Our knowledgeable applications engineering team guides engineers in finding optimal design solutions by carefully matching specifications and ensuring product compatibility.

Robust Portfolio of Best-In-Class Solutions: With heavy investment in a comprehensive portfolio of RF and microwave components and power solutions, RFMW enables next-gen development for a wide variety of industrial, commercial, military, and consumer applications.

Logistics Support: RFMW's broad and deep inventory of high-value RF & microwave components enables streamlined logistics through just-in-time delivery and supply chain risk minimization.

Culture & Infrastructure: Backed by a team of expert sales, engineering, and logistics professionals, RFMW delivers unmatched customer support.

Conclusion

For the RF & microwave and power management industry, the value of



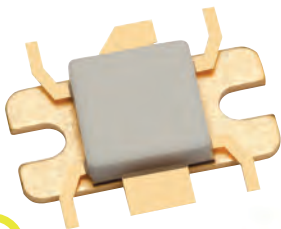
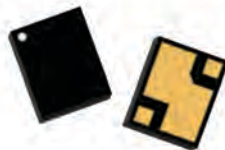
RFMW's President and
CEO, Joel Levine

partnering with RFMW extends far beyond simple product fulfillment. Our extensive portfolio and brand promise ensures quality and reliability of sourced components, while our specialized sales team provides unsurpassed customer service to customers. From introduction to production, our team of experts is your procurement solution.

www.rfmw.com



From **Introduction to Production**



Strategically Aligned Distribution

RFMW partners with world-leading manufacturers in RF, microwave, and power technologies to deliver strategically driven distribution services. Our highly-skilled, technical sales and marketing team supports customers worldwide with tailored solutions and expert guidance.

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The Top 50 Americas Authorized Distributors

The final tables of this report present the complete list of Top 50 Americas Authorized Distributors for 2024 along with Top 10 rankings for individual component categories, top sales growth, and top revenue per employee.

2024 Rank	2023 Rank	Company	2024 Americas Sales (\$ Thousands)	Growth 2023/2024 (%)	Share of Top 50 Total Sales (%)	Americas Sales Share of Worldwide (%)	Distributor Type*	Sales Breakdown by Percent							Total Americas Employees	Sales per Employee (\$ Millions)
								Semiconductor (Active)	Passive Component	Electro-Mechanical	Interconnect	Computer/Systems	Power & Battery	Other		
1	1	Arrow Electronics, Inc. ⁽²⁾	6,411,701	-19.4	22.52	32.1	1	71.0	6.9	5.2	5.4	7.0	-	4.5	5,850	1.10
2	2	Avnet ⁽²⁾	5,456,682	-17.5	19.17	24.3	1	75.2	5.9	3.9	8.0	3.0	-	4.0	4,700	1.16
3	3	TTI, Inc., Consolidated*	4,335,000	-2.4	15.23	55.2	2	17.0	28.0	11.0	36.0	2.0	5.0	1.0	5,000	0.87
4	4	DigiKey	2,100,000	-12.5	7.38	60.0	3	31.1	19.2	16.0	23.4	2.8	7.2	0.3	4,030	0.52
5	5	Future, a WT Microelectronics company ⁽¹⁾	1,800,000	-10.0	6.32	37.9	1	74.9	9.0	8.0	5.3	-	2.8	-	1,875	0.96
6	6	WESCO	1,600,000	0.6	5.62	100.0	1	-	-	80.0	10.0	-	10.0	-	700	2.29
7	7	RS Group	1,100,000	0.0	3.86	31.1	1	1.0	1.0	35.0	16.0	2.0	12.0	33.0	1,650	0.67
8	8	Heilind Electronics	924,824	-0.8	3.25	80.7	2	-	5.0	10.0	85.0	-	-	-	1,340	0.69
9	10	WPG Americas Inc.	515,000	30.4	1.81	1.9	2	75.0	-	-	-	5.0	15.0	5.0	90	5.72
10	9	Master Electronics ⁽¹⁾	444,750	10.6	1.56	75.0	1	10.5	16.9	26.1	39.0	4.7	-	2.8	500	0.89
11	11	FDH Electronics	379,000	8.1	1.33	89.6	2	-	-	49.1	50.9	-	-	-	675	0.56
12	12	Bisco Industries	358,400	13.3	1.26	95.4	1	1.0	20.0	40.0	20.0	1.0	2.0	16.0	580	0.62
13	13	Nexty Electronics ⁽¹⁾	307,580	7.9	1.08	6.5	1	85.0	4.0	3.0	5.0	1.0	-	2.0	130	2.37
14	15	Supreme Electronics ⁽¹⁾	295,181	22.5	1.04	4.0	1	96.2	0.9	2.9	-	-	-	-	175	1.69
15	14	Powell Electronics	280,357	8.9	0.98	93.2	1	-	-	11.0	89.0	-	-	-	242	1.16
16	16	Macnica	274,365	34.1	0.96	4.8	1	99.7	-	-	-	-	-	0.3	108	2.54
17	18	PEI-Genesis ⁽¹⁾	177,937	-5.4	0.63	64.4	1	-	-	-	100.0	-	-	-	330	0.54
18	17	Galco Industrial Electronics	168,286	-11.0	0.59	100.0	2	1.0	12.0	11.0	7.0	1.0	-	68.0	232	0.73
19	20	Hughes-Peters	113,000	-6.6	0.40	100.0	1	3.0	25.0	45.0	25.0	-	-	2.0	160	0.71
20	19	Richardson Electronics ⁽¹⁾	103,510	-26.6	0.36	51.0	2	69.0	12.0	1.0	4.0	-	5.0	9.0	350	0.30
21	21	Flame Enterprises	100,000	2.0	0.35	83.3	2	-	-	98.0	2.0	-	-	-	62	1.61
22	23	Marsh Electronics	98,466	15.8	0.35	100.0	1	0.3	39.5	24.9	6.1	-	4.7	24.5	138	0.71
23	25	All Tech Electronics, Inc.	85,310	15.4	0.30	100.0	2	90.0	5.0	5.0	-	-	-	-	35	2.44
24	22	Steven Engineering	79,736	-11.5	0.28	90.0	2	-	-	35.0	35.0	7.0	2.0	21.0	119	0.67
25	26	Brevan Electronics	78,300	8.0	0.28	100.0	1	30.0	35.0	20.0	5.0	2.0	3.0	5.0	63	1.24
26	24	SIIX ⁽¹⁾	73,133	-8.6	0.26	9.5	1	95.0	-	-	-	-	-	5.0	60	1.22
27	27	Peerless Electronics ⁽¹⁾	62,800	3.0	0.22	100.0	1	4.5	3.5	75.2	7.8	-	-	9.0	105	0.60
28	31	Falcon Electronics	62,000	33.3	0.22	98.9	2	100.0	-	-	-	-	-	-	19	3.26
29	29	Flip Electronics	57,200	4.2	0.20	59.2	2	100.0	-	-	-	-	-	-	88	0.65
30	28	Area51 Electronics	55,768	-7.1	0.20	99.2	1	4.0	17.0	32.0	19.0	5.0	1.0	22.0	61	0.91
31	30	Rutronik Elektronische Bauelemente GmbH	55,000	10.0	0.19	5.1	1	50.0	41.0	7.0	-	2.0	-	-	50	1.10
32	35	NASCO AEROSPACE & ELECTRONICS	53,074	41.8	0.19	100.0	1	25.0	5.0	25.0	25.0	10.0	5.0	5.0	29	1.83
33	32	EDOM Technology Co., Ltd.	49,082	12.8	0.17	1.4	1	100.0	-	-	-	-	-	-	-	NA
34	33	Beyond Components ⁽¹⁾	41,000	4.1	0.14	100.0	1	4.2	3.8	74.8	7.2	-	-	10.0	70	0.59
35	34	Edge Electronics, Inc. ⁽¹⁾	40,000	2.3	0.14	85.6	1	52.4	1.8	1.0	1.8	21.0	3.0	19.0	35	1.14
36	36	CDM Electronics ⁽¹⁾	33,800	5.3	0.12	92.3	1	-	-	6.0	94.0	-	-	-	120	0.28
37	37	Diverse Electronics	30,800	-2.5	0.11	87.0	1	15.0	12.0	18.0	30.0	2.0	22.0	1.0	45	0.68
38	39	March Electronics ⁽¹⁾	27,600	4.9	0.10	100.0	2	-	-	-	100.0	-	-	-	35	0.79
39	40	Sherburn Electronics ⁽¹⁾	27,000	3.8	0.09	100.0	2	10.0	20.0	35.0	25.0	10.0	-	-	11	2.45
40	41	NEP Electronics ⁽¹⁾	25,200	2.9	0.09	100.0	1	10.0	10.0	60.0	10.0	-	-	10.0	125	0.20
41	42	World Micro Components / MIT Distributors ⁽¹⁾	25,000	4.2	0.09	91.9	2	50.0	14.0	8.0	11.0	-	10.0	7.0	45	0.56
42	44	Bluff City Electronics	24,000	14.3	0.08	100.0	1	5.0	10.0	70.0	-	5.0	-	10.0	35	0.69
43	43	Microwave Components LLC	23,775	12.7	0.08	97.1	2	-	4.2	8.4	87.4	-	-	-	25	0.95
44	38	Ryoden ⁽¹⁾	22,110	-19.0	0.08	2.2	1	87.6	12.4	-	-	-	-	-	10	2.21
45	45	Benchmark Connector Corporation ⁽¹⁾	20,000	8.1	0.07	94.7	2	-	-	-	100.0	-	-	-	56	0.36
46	46	Kensington Electronics Inc	19,420	-2.9	0.07	97.9	1	-	93.0	-	5.0	-	-	2.0	24	0.81
47	48	S.A.S. Dragon ⁽¹⁾	17,686	12.6	0.06	0.5	1	90.0	4.1	5.5	-	-	-	0.4	10	1.78
48	47	Projections Unlimited, Inc. (PUI)	14,106	-21.2	0.05	91.4	1	13.0	22.0	54.0	11.0	-	-	-	30	0.47
49	49	Inductors Inc ⁽¹⁾	12,980	6.8	0.05	90.1	2	4.0	95.0	1.0	-	-	-	-	16	0.81
50	50	Transfer Multisort Elektronik (TME)	8,745	4.9	0.03	2.9	3	5.4	4.9	9.2	19.3	2.0	3.0	56.3	10	0.87
TOTAL TOP 50			28,468,663	-9.3	100.00	23.0		46.4	10.5	14.7	18.2	3.0	2.9	4.4	30,248	0.94

*Type of Distributor: 1 = Broadline; 2 = Specialized; 3 = High Service/E-Catalog

Notes: ⁽¹⁾ ECIA Estimate for Total North America Sales and Sales Breakdown ⁽²⁾ ECIA Estimate for Sales Breakdown ⁽³⁾ ECIA Estimate for Total North America Sales

*TTI Consolidated includes: TTI, Mouser, Sager, RFMW & Symmetry

ECIA Top 50 Americas Authorized Distributors Report 2025

Top 10 semiconductor (active) sales

Rank 2024	Company	2024 Americas Sales (\$ Millions)	Share of Top 50 Total Sales (Percent)
1	Arrow Electronics, Inc. ⁽¹⁾	4,552.3	34.47
2	Avnet ⁽¹⁾	4,103.4	31.07
3	Future, a WT Microelectronics company ⁽¹⁾	1,348.2	10.21
4	TTI, Inc., Consolidated*	737.0	5.58
5	DigiKey	653.1	4.95
6	WPG Americas Inc.	386.3	2.92
7	Supreme Electronics ⁽¹⁾	284.0	2.15
8	Macnica	273.6	2.07
9	Nexty Electronics ⁽¹⁾	261.4	1.98
10	All Tech Electronics, Inc.	76.8	0.58
	Others	529.5	4.01
	TOTAL TOP 50	13,205.5	100.00

Top 10 electro-mechanical sales

Rank 2024	Company	2024 Americas Sales (\$ Millions)	Share of Top 50 Total Sales (Percent)
1	WESCO	1,280.0	30.68
2	TTI, Inc., Consolidated*	476.9	11.43
3	RS Group	385.0	9.23
4	DigiKey	336.1	8.06
5	Arrow Electronics, Inc. ⁽¹⁾	333.4	7.99
6	Avnet ⁽¹⁾	212.8	5.10
7	FDH Electronics	186.3	4.46
8	Future, a WT Microelectronics company ⁽¹⁾	144.0	3.45
9	Bisco Industries	143.4	3.44
10	Master Electronics ⁽¹⁾	116.1	2.78
	Others	557.6	13.37
	TOTAL TOP 50	4,171.5	100.00

Top 10 computer/system product sales

Rank 2024	Company	2024 Americas Sales (\$ Millions)	Share of Top 50 Total Sales (Percent)
1	Arrow Electronics, Inc. ⁽¹⁾	448.8	51.94
2	Avnet ⁽¹⁾	163.7	18.94
3	TTI, Inc., Consolidated*	86.7	10.03
4	DigiKey	58.5	6.77
5	WPG Americas Inc.	25.8	2.98
6	RS Group	22.0	2.55
7	Master Electronics (1)	20.9	2.42
8	Edge Electronics, Inc. ⁽¹⁾	8.4	0.97
9	Steven Engineering	5.6	0.65
10	NASCO AEROSPACE & ELECTRONICS	5.3	0.61
	Others	18.5	2.14
	TOTAL TOP 50	864.2	100.00

Top 10 distributors by sales growth

Rank 2024	Company	Sales Growth 2023/2024 (Percentage)	2024 Americas Sales (\$ Millions)	2023 Americas Sales (\$ Millions)
1	NASCO AEROSPACE & ELECTRONICS	41.8	53.1	37.4
2	Macnica	34.1	274.4	204.6
3	Falcon Electronics	33.3	62.0	46.5
4	WPG Americas Inc.	30.4	515.0	395.0
5	Supreme Electronics ⁽¹⁾	22.5	295.2	240.9
6	Marsh Electronics	15.8	98.5	85.1
7	All Tech Electronics, Inc.	15.4	85.3	73.9
8	Bluff City Electronics	14.3	24.0	21.0
9	Bisco Industries	13.3	358.4	316.2
10	EDOM Technology Co., Ltd.	12.8	17.8	15.7
	Others	-10.9	26,685.1	29,941.6
	TOTAL TOP 50	-9.3	28,468.7	31,377.9

Note = (1) ECIA Estimate

Top 10 passive component sales

Rank 2024	Company	2024 Americas Sales (\$ Millions)	Share of Top 50 Total Sales (Percent)
1	TTI, Inc., Consolidated*	1,213.8	40.60
2	Arrow Electronics, Inc. ⁽¹⁾	442.4	14.80
3	DigiKey	403.9	13.51
4	Avnet ⁽¹⁾	321.9	10.77
5	Future, a WT Microelectronics company ⁽¹⁾	162.0	5.42
6	Master Electronics ⁽¹⁾	75.2	2.51
7	Bisco Industries	71.7	2.40
8	Heilind Electronics	46.2	1.55
9	Marsh Electronics	38.9	1.30
10	Hughes-Peters	28.3	0.94
	Others	185.3	6.20
	TOTAL TOP 50	2,989.6	100.00

Top 10 interconnect sales

Rank 2024	Company	2024 Americas Sales (\$ Millions)	Share of Top 50 Total Sales (Percent)
1	TTI, Inc., Consolidated*	1,560.6	30.15
2	Heilind Electronics	786.1	15.19
3	DigiKey	491.9	9.50
4	Avnet ⁽¹⁾	436.5	8.43
5	Arrow Electronics, Inc. ⁽¹⁾	346.2	6.69
6	Powell Electronics	249.5	4.82
7	FDH Electronics	192.7	3.72
8	PEI-Genesis ⁽¹⁾	177.9	3.44
9	RS Group	176.0	3.40
10	Master Electronics ⁽¹⁾	173.5	3.35
	Others	584.5	11.29
	TOTAL TOP 50	5,175.5	100.00

Top 10 power & battery sales

Rank 2024	Company	2024 Americas Sales (\$ Millions)	Share of Top 50 Total Sales (Percent)
1	TTI, Inc., Consolidated*	216.8	25.97
2	WESCO	160.0	19.17
3	DigiKey	150.8	18.06
4	RS Group	132.0	15.82
5	WPG Americas Inc.	77.3	9.26
6	Future, a WT Microelectronics company ⁽¹⁾	50.4	6.04
7	Bisco Industries	7.2	0.86
8	Diverse Electronics	6.8	0.81
9	Richardson Electronics ⁽¹⁾	5.2	0.62
10	Marsh Electronics	4.6	0.55
	Others	23.7	2.84
	TOTAL TOP 50	834.6	100.00

Top 10 sales per Americas employee

Rank 2024	Company	2024 Americas Sales (\$ Millions)	Americas Employees	Sales per Employee (\$ Millions)
1	WPG Americas Inc.	515.0	90	5.72
2	Falcon Electronics	62.0	19	3.26
3	Macnica	274.4	108	2.54
4	Sherburn Electronics ⁽¹⁾	27.0	11	2.45
5	EDOM Technology Co., Ltd.	49.1	20	2.45
6	All Tech Electronics, Inc.	85.3	35	2.44
7	Nexty Electronics ⁽¹⁾	307.6	130	2.37
8	WESCO	1,600.0	700	2.29
9	Ryoden ⁽¹⁾	22.1	10	2.21
10	NASCO AEROSPACE & ELECTRONICS	53.1	29	1.83
	Others	25,473.1	29,116	0.87
	TOTAL TOP 50	28,468.7	30,268	0.94



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AMERICAS INDEPENDENT
DISTRIBUTORS REPORT 2025

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Turbulent times and tariffs

In this Top 6 Independent Distributor Report, *Electronics Sourcing's* data and software analyst, Thomas Smart, talks quantum computing, supply chain resilience and more



Thomas Smart
Data & Software Analyst
Electronics Sourcing

This year's report comes in the wake of significant market volatility, resulting in only six independent distributors contributing.

2024's choppy waters are slowly receding, to be replaced by unprecedented tariffs. At the time of writing, President Trump has imposed retaliatory increases to the reciprocal tariffs of host nations, further raising the stakes. Market confidence is low and reluctance to invest points towards recession.

The US holds the mantle of being the largest import market at 3.17 trillion USD in 2023. If the US continues down this isolationist path, pressure will mount on export nations to seek business elsewhere or suffer a knock to GDP. Ultimately a de-escalation of retaliatory tariffs is critical for global market confidence.

Preparing for a quantum future

First on the list of potential sales drivers for 2025 is quantum computing. Component distributors will naturally play an important role in the future of quantum computing. Quantum chips represent leading edge technology but still require an array of traditional parts to function as a system. Researchers and

developers rely on distributors for small order sizes, development tools and fast delivery. While some highly specialized quantum parts, such as cryogenic cooling are currently sourced from smaller, specialised companies, distribution is an obvious channel as volume increases.

“The global semiconductor shortage, triggered by the pandemic, demonstrated how fragile these critical supply chains can become”

From kits to custom cables, distributors are here to help. Likewise, thanks to distributors' global reach, they have the capacity and capability of helping more people, in more places, access quantum technology.

Second on the potential sales drivers list is AI. Third and fourth places go to EVs and energy/power infrastructure, driven by the push towards net zero

and environmental legislation. Datacentres round out the top five.

The rapid development of new tech encourages distributors to remain agile and explore new technologies and emerging markets. Those hitting the ground running are set to secure the next frontier of electronic component distribution.

Bolstering resilience

During these turbulent times, the resilience of electronic component supply chains holds a unique and vital significance. Products from smartphones and laptops, to medical devices and EVs, form the backbone of modern society. However, the concentrated nature of their production and distribution makes these supply chains susceptible to disruptions. The global semiconductor shortage, triggered by the pandemic, demonstrated how fragile these critical supply chains can become.

The task of bolstering resilience goes beyond individual business interests and directly impacts global competitiveness, innovation and economic growth.

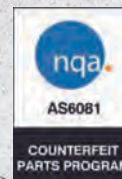
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page 76



HAVING A HARD TIME SOLVING THE 2025 SUPPLY CHAIN PUZZLE?



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The Top 6 Americas Independent Distributors

Rank	Company	2024 Americas Revenues	Share of Top 6 Total Sales (%)	Americas Sales Share of Global (%)	2024 Global Revenues	Type*	Total Employees	Sales per Employee
1	NewPower Worldwide	\$1,788,000,000	53%	79%	\$2,255,000,000	1	155	\$14,548,387
2	Smith	\$1,222,000,000 ⁽³⁾	36%	47% ⁽³⁾	\$2,600,000,000	1	900	\$2,888,889
3	WIN SOURCE ELECTRONICS	\$238,000,000	7%	42%	\$568,000,000	1	318	\$1,786,164
4	Quiksol International Components	\$101,000,000	3%	32%	\$320,000,000	1	180	\$1,777,778
5	Freedom USA	\$39,840,000 ⁽³⁾	1%	83% ⁽³⁾	\$48,000,000	1	51	\$941,176
6	4 Star Electronics, Inc.	\$10,500,000	<1%	70%	\$15,000,000	1	35	\$428,571

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*Type of Distributor:

1 = Broadline
2 = Specialized

⁽³⁾ = Electronics Sourcing estimate

TOP 50 Executive Insight 2025

Playing it safe isn't safe anymore

ChipStock explores the role of distribution in these uncertain times, where partnerships, transparency, flexibility and trust underpin success now and in the future



Dustin Osborne,
President, **ChipStock**

2025 is a year to move forward with purpose. While there are still economic uncertainties, waiting for perfect conditions often means missing out. Innovation is moving fast. The companies investing in digital tools, building stronger supply chains and staying close to customers will stay ahead.

Playing it safe isn't really safe anymore. Demand is shifting quickly, with growth in areas like AI, EV, medical and industrial. That creates opportunities for distributors to step up, solve challenges and deliver value.

By building smarter, moving faster and focusing on long-term

partnerships, distribution can help shape the industry's future.

Tariffs and export controls have re-emerged as critical challenges. Uncertainty around tariffs has resulted in a significant increase in risk throughout the supply chain. How can distributors support their partners in managing this uncertain climate?

These challenges are real. Distributors need to show up not just as vendors, but partners who can help customers navigate this complexity.

It starts with transparency. Customers need to know what's happening and why, whether it's changes in trade policy or shifts

in sourcing. Distributors need to share updates, offer alternative solutions and help customers make informed decisions quickly.

Flexibility means building regional supply options, having contingency plans in place and staying agile to adapt when things shift unexpectedly.

Mostly it's about trust. Partners need to know we're in it with them, reducing friction, cutting through the noise and delivering reliable support: that's how we bring real value.

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What Quiksol Does

Quiksol specializes in providing tailored supply chain solutions that help businesses optimize their procurement processes and avoid delays. Their services include:

- **Material Cost Reduction:** Helping businesses reduce procurement costs without compromising quality.
- **Excess Inventory Management:** Tailored strategies to handle surplus stock, using programs like Line Buys, Lot Buys, and Consignment.
- **Supply Continuity Solutions:** Ensuring a steady supply of components to keep production schedules on track.
- **Long-Term Schedule Support:** Providing the reliability needed to meet long-term production timelines.
- **MRP Inventory Management:** Aligning inventory levels with

demand to prevent shortages and optimize stock.

- **End-of-Life (EOL) Parts Solutions:** Sourcing discontinued or hard-to-find components to avoid costly redesigns.

- **Material Shortage Solutions:** Securing essential components through Quiksol's global network, even in times of market volatility.

Key Achievements

- Over 20 years of experience in the global electronics distribution industry.
- Strong relationships with key manufacturers across the globe.
- Known for reliability and flexibility, ensuring that clients meet their production schedules without disruption.

Quiksol continues to focus on building lasting partnerships,

providing the support businesses need to stay competitive in the electronics market.

“

“We solve supply chain challenges by delivering the right components and support at the right time; whether it’s cutting costs, managing excess inventory, or securing hard-to-find parts. What sets us apart is our ability to offer customized solutions with a personal touch across the global market.”

Brian Ellison,
President

”



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A2 Global views every customer as a partner, building relationships rooted in communication, trust, and accountability—so you have a team aligned with your goals and ready to support you.

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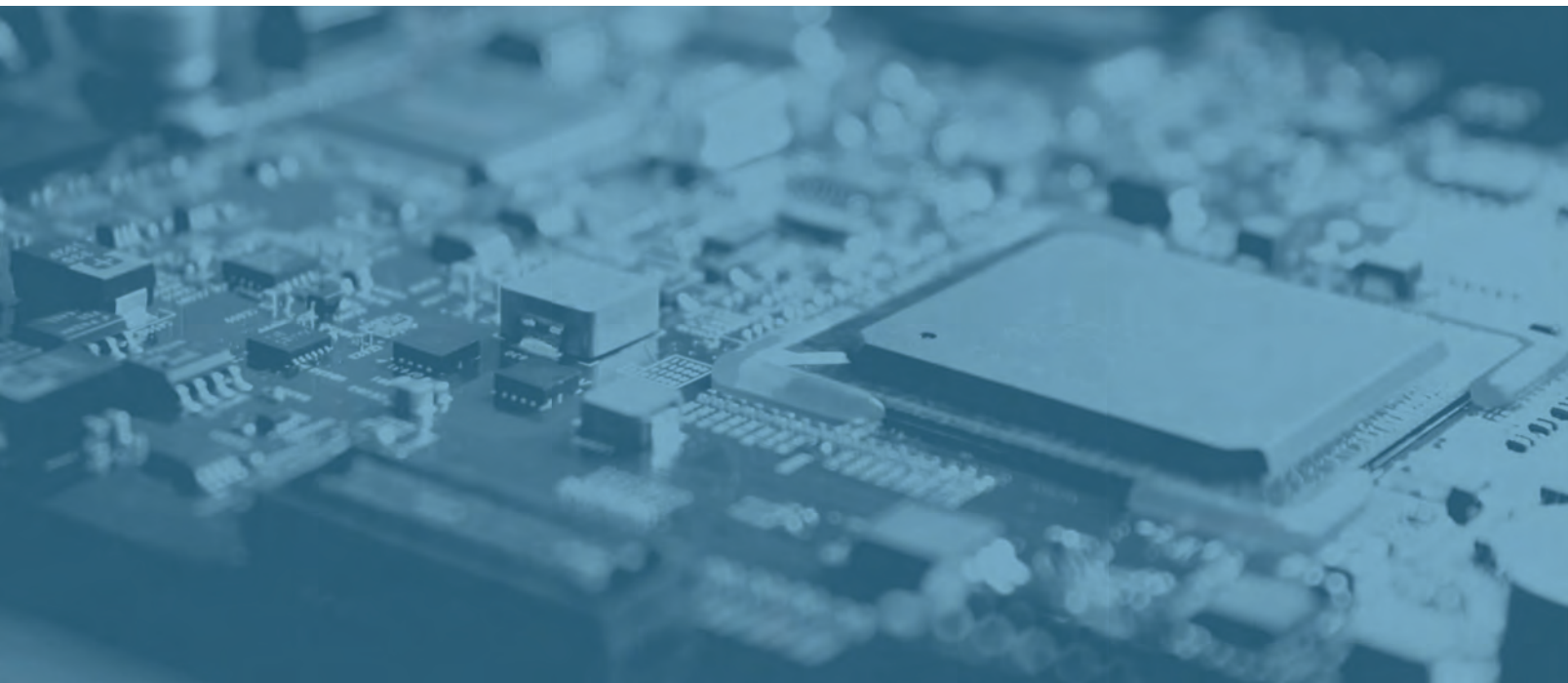
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Sustaining growth in a changing market

Electronics Sourcing asked NewPower Worldwide's CEO, Carleton Dufoe, for 2025's distribution outlook and how businesses can navigate opportunities and challenges



**Carleton Dufoe, CEO,
NewPower Worldwide**

2025 presents a complex landscape for the electronics distribution industry, with significant opportunities and challenges. Demand across key sectors continues to climb and, by mid-year, we anticipate demand for certain critical products and manufacturers will exceed supply. This growing imbalance highlights the market's accelerating pace and need for businesses to remain agile and prepared for what lies ahead.

This strong demand is being fueled by transformative advancements in artificial intelligence, high-performance computing, data centers, automotive innovation and telecommunications. The global semiconductor industry is projected to reach \$700 billion in 2025 (a new record) and keep the industry on track to achieve \$1 trillion in sales by 2030. This growth is primarily driven by AI-powered applications, edge computing and the increasing sophistication of automotive technologies. These trends are reshaping industries and creating unprecedented opportunities for growth and innovation.

The semiconductor industry is experiencing a remarkable period of expansion, with sales expected to grow by 15 percent in 2025. This growth is largely attributed to increasing demand for high-end logic process chips and high bandwidth memory (HBM) required for AI applications. The memory segment is forecasted to surge by more than 25 percent, driven by the adoption of advanced products like HBM3 and HBM3E for AI accelerators.

“Geopolitical tensions, cybersecurity threats and economic uncertainty remain top concerns, while supply chain volatility continues to test businesses’ resilience”

In the automotive sector, semiconductor chips are playing a crucial role in enabling smarter, more connected and autonomous vehicles. Companies like Tesla, Qualcomm and Infineon are at the forefront of integrating advanced semiconductor solutions into next-generation automobiles, enhancing capabilities such as full self-driving, advanced driver assistance systems and improved energy efficiency in electric vehicles.

However, alongside this promise of growth are substantial risks. Geopolitical tensions, cybersecurity

threats and economic uncertainty remain top concerns, while supply chain volatility continues to test businesses’ resilience. In this complex environment, success demands bold, forward-thinking strategies and a proactive approach to mitigating risks and ensuring adaptability.

Strategic partnerships will play a pivotal role in overcoming these challenges. The right partner can provide the expertise, global reach and innovative tools necessary to navigate uncertainty, maintain operational flexibility and stay focused on long-term goals. Collaboration is no longer just an option—it’s a critical component of thriving in today’s dynamic landscape.

NewPower Worldwide understands these complexities and is dedicated to helping its customers succeed. As a leading global independent distributor, the company offers tailored solutions such as inventory management, strategic sourcing and excess material strategies. These services empower businesses to not only address immediate challenges but also position themselves for sustainable growth in an ever-changing industry.

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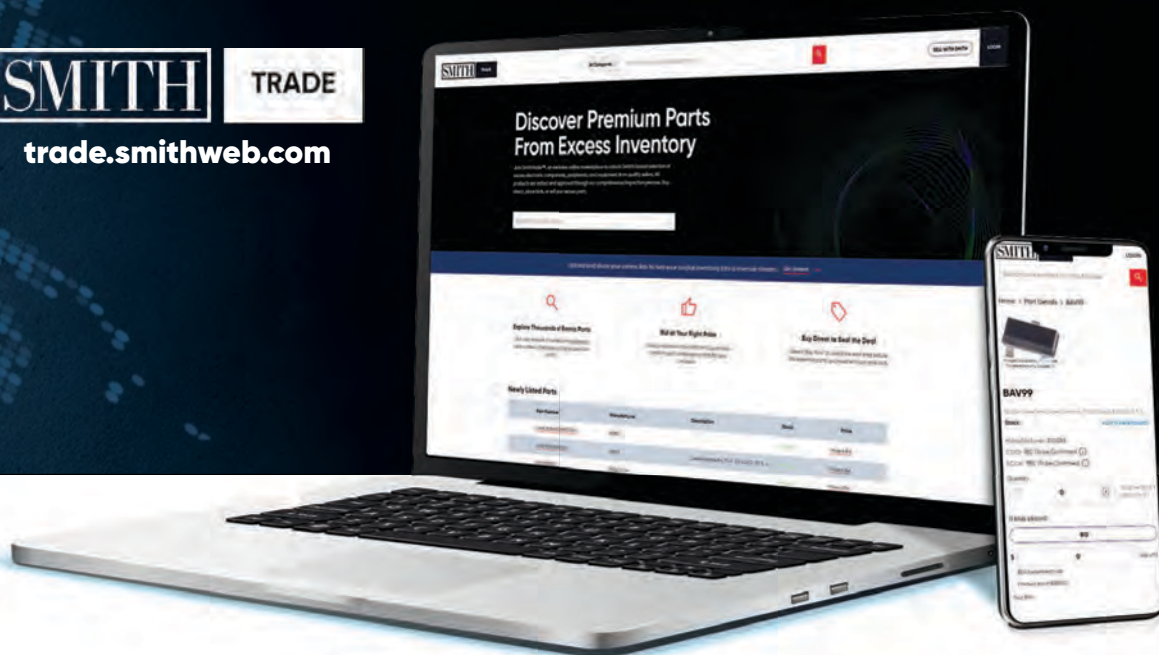
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Market Intelligence

Follow Smith online and stay up to date on the latest market trends to inform your decision making.

Quality Assurance

Smith's stringent supplier-approval process ensures high-quality products from thoroughly vetted and approved vendors.

Secure Deals

Conduct all transactions through the SmithTrade™ platform, backed by Smith's Terms & Conditions.

Get in touch with your Smith representative or visit **smithweb.com** to learn more about turning your excess components into a profitable and environmentally friendly new revenue stream.





Sourcing what keeps you moving.

Don't let market uncertainty wreak havoc on your carefully laid plans. Streamline your supply chain with end-to-end distribution services and expertly designed digital tools.





Sourceability delivers what matters most — seamless distribution that keeps production on track. With Sourcengine and Datalynq, you get the visibility and tools to plan smarter and move faster.



Founded with a mission to bring transparency to the unpredictable electronic components distribution market, Sourceability® has established itself as a trusted global distributor and strategic sourcing partner for businesses worldwide.

Streamline the complex procurement process with our sourcing expertise and end-to-end digital tools. Secure cost-savings and supply chain transparency with Sourcengine™, our flagship e-commerce platform. Sourcengine connects you with over 3,500 traceable and vetted suppliers through a user-friendly interface, API integrations, and real-time inventory updates.

Leverage advanced market insights on supply chain disruptions and inventory availability with Sourceability's premier market intelligence tool, Datalynq™. Datalynq provides deep insights into component availability, supply chain risks, and lifecycle status. Armed with proactive case management capabilities, tackle challenges like obsolescence while adhering to stringent industry standards.

Optimize your procurement strategies with reliable support and authentic, high-quality components. We offer competitive pricing and expert design assistance through our strategic partnerships with leading manufacturers. Our commitment to quality guarantees that you are equipped with the most effective and scalable solutions available.

Receive timely deliveries across a wide range of components—even during supply chain disruptions—through our robust logistics and distribution network. Our comprehensive supplier verification processes and certifications keep counterfeits out and high-quality components in when you purchase through Sourceability.

WHAT'S NEXT: As the semiconductor industry evolves, we will continue to expand our technological capabilities and global reach. We aim to empower companies to confidently navigate the complexities of today's semiconductor supply chain with our deep industry expertise and forward-looking approach. By integrating advanced technology with strategic sourcing, we help you stay ahead of disruptions and meet the demands of an ever-changing global market.

Secure high-quality components with a seamless procurement strategy. [Connect with us today!](#)

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Differentiate and emerge stronger

Electronics Sourcing North America asked 4 Star Electronics whether 2025 is a year for caution or a year to take the initiative in aggressively pursuing new opportunities?



Scott McKee,
Director of Operations,
4 Star Electronics

After a tumultuous few years, 2025 is a time for distributors to pause to assess the market and look for new opportunities. There's no point standing still and wishing for widespread shortages to come back; there is still excess stock in the supply chain and uncertain demand due to global economic conditions, geopolitical tensions and trade disruptions such as tariffs and export restrictions.

Industry has little control over these issues, but distributors can strengthen themselves for the future. The following are pointers.

Take advantage of the current market. There are still shortages of MLCCs, power semiconductors and CPUs/GPUs. Even without economic recovery, these categories are showing high demand.

Be prepared. If there is a significant recovery and associated increase in demand, distributors must be ready to respond quickly since manufacturing capacity has not increased substantially and a return of widespread shortages is possible.

Consider new supply chain strategies to build stronger supplier networks.

Counterfeit components continue to be a risk, so take steps to build inspection and testing capacity.

Be strategic with technology investments to help gain real-time insights into market trends and forecasting to ensure future efficiency.

Optimize inventory management. There will continue to be tremendous opportunities to buy and stock excess inventory now, helping smooth future supply fluctuations.

www.4starelectronics.com

Managing risk and ensuring component flow

Sourceability explains how its global network of sourcing professionals and digital tools help manufacturers secure their supply chains against geopolitical changes and tariffs



Rob Picken,
SVP, Digital Transformation,
Sourceability

Over recent years, geopolitical tensions have been rising, including export bans and restrictions placed on everything from advanced semiconductor manufacturing equipment to raw materials critical in chip fabrication. Thus, managing risk and ensuring component flow is more crucial than ever. Distributors can provide proactive solutions while mitigating unavailability challenges.

Distributors can help by providing early warnings about potential disruptions. This can be accomplished by identifying which components are at greater risk of unavailability caused by tariffs or export controls. By staying informed of trade policies and communicating risks to

partners, organizations can adjust their strategies and plan for potential delays or cost increases. This proactive approach helps businesses avoid costly surprises and maintain smoother operations.

Additionally, having access to a diverse network of suppliers is paramount. These alternative sourcing options allow organizations to mitigate the effects of tariffs and export restrictions. By offering flexible and strategic sourcing solutions, distributors ensure that companies can continue accessing the components they need, even in the face of unforeseen challenges.

Ultimately, distributors can support their partners by leveraging both sourcing

expertise and technology to manage supply chain risks. By offering alternative sourcing strategies and maintaining open communication, they help promote greater transparency across the supply chain. This lets companies stay agile and resilient in the face of uncertainty. Sourceability leverages a global network of sourcing professionals and well-designed digital tools to help organizations secure their lines against disruptions, including those caused by geopolitical changes or tariffs.

www.sourceability.com

Component distribution at its best

In this article, Freedom explains why it sees 2025 as a year of expansion with investments in staffing, programs, customer engagement and facilities.

As Q1 2025 closes, Freedom is extremely optimistic about the market ahead and its customer opportunity. Progress in 2024 has led to solid organic growth from new and existing customers. OEMs and contract manufacturers continue to share feedback about vital needs that will help them manage their supply chains more efficiently and effectively in support of their end customers.

Freedom is well positioned to offer customer specific services that

provide increased ROI and cash to cash improvement that helps our partners manage their component spend. Although headwinds exist in the global market, many of these challenges are shared across the entire distributor network attempting to do business in the Americas.

Freedom sees its model as a strategic advantage at a time when flexibility and speed of execution are real differentiators. Core markets, including medical, industrial, data center, power, IOT and communications, have many

viable companies competing well in their markets and they are looking for partners that complement their efforts.

In addition, Freedom is expanding into other market segments that match its service offering well and will offer new revenue streams that will only further solidify our business, including A&D as we are now a DLA certified distributor. Freedom believes it is component distribution at its best and can be a valuable piece in any supply chain.

www.freedomusa.com



John Magee, President of Sales & Operations, Freedom USA

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Making growth happen

Quiksol reminds purchasing professionals that the keys to turning opportunities into lasting growth in 2025 include open communication, forward planning and bold decisions

After an unprecedented shortage market, 2025 needs to be the turning point for recovery and stability. Customers and suppliers are ready to move forward, making bold decisions for growth while remembering the lessons learned from the past. The hesitation that marked the previous years must give way to decisive action.

The dynamics of the electronics supply chain have shifted, and these changes are only going to accelerate. Product lifecycles are evolving faster than ever, and this speed will bring both new challenges and opportunities. As an industry, we must embrace

these changes and pursue new opportunities aggressively, with the understanding that quick action and flexibility are key to staying ahead.

Staying informed and adaptable is vital in a market shaped by unpredictable global factors, including geopolitical shifts. Knowledge, communication and transparency between customers and suppliers have always been important, but now they're essential. They are no longer just marketing buzzwords; they are paramount for surviving and thriving in this new environment.

Choosing the right supply chain partner is more important than ever. It's about being able to communicate openly,

plan ahead and work together toward long-term goals. The saying 'success is defined by getting up one more time than you fall down' has never felt more relevant. 2025 is the time for those who are ready to make bold decisions, move quickly and work with trusted partners to turn opportunities into lasting growth.

www.quiksol.com



**Brian Ellison, President,
Quiksol Americas**

Distribution: strategic partners in managing tariffs

A2 Global Electronics highlights how—in today's unpredictable trade landscape—distributors are more than just suppliers, they are risk mitigation partners

The recent resurgence of tariffs and export controls in the United States introduces new risks and complexities across the global electronics supply chain. As trade regulations evolve, procurement professionals face increasing pressure to maintain compliance, manage costs and ensure supply chain continuity. In this dynamic environment, distributors play a critical role in helping businesses navigate shifting regulations and mitigate disruptions.

Traceability is fundamental to tariff compliance. Distributors with advanced tracking capabilities provide a strategic

advantage by maintaining detailed records of country-of-origin data, tariff classifications and regulatory updates. These capabilities empower customers to make informed sourcing decisions, avoid costly penalties and maintain uninterrupted operations.

Diversified sourcing is another key strategy. Distributors with a global reach provide alternative procurement options, reducing exposure to tariff-driven cost increases and supply shortages. This flexibility ensures a stable and reliable component supply, even in the face of shifting trade policies.

Beyond logistics, distributors serve as trusted advisors, helping businesses stay ahead of regulatory changes. By delivering real-time insights into trade policies, export controls and tariff exemptions, they enable procurement teams to proactively adjust their strategies, ensuring ongoing compliance and operational efficiency.

By combining compliance expertise, supply chain agility and up-to-the-minute intelligence, distributors help businesses navigate uncertainty with confidence, ensuring long-term supply chain resilience.

www.a2globalelectronics.com



**Frank Cavallaro, CEO,
A2 Global Electronics**

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Velocity Electronics is more than a supplier of electronic components. We are your trusted partner in building the future of electronic distribution — providing you with tailored solutions to streamline your operations, reduce costs, and ensure you have exactly the parts you need, when you need them.



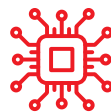
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Access to Velocity's in-stock inventory, globally qualified suppliers, and industry leading software provides our business partners with speed and accuracy of current market availability.



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Velocity leverages its existing regional Inspection and Distribution Centers (IDCs) in Austin, Amsterdam, and Singapore to provide solutions in all major manufacturing regions.



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Consignment

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LTB/EOL
Inspection

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MCU Vendors Broaden Offerings as Edge AI Push Intensifies

MCUs are the workhorses of the semiconductor industry, infusing life into devices across multiple markets. With Edge AI proliferating, suppliers see bigger sales opportunities ahead

Microcontrollers are the unsung heroes of the electronics equipment world. Without them, the market as it is today will come to a halt, according to researchers at the Yole Group, a France-based semiconductor consultancy. MCUs touch almost all segments of the global economy, flourishing and believed to be critical components in markets as varied as farming, medical, aerospace, manufacturing, automobiles and defense. Any major disruptions to the global supply of MCUs could prove catastrophic to OEMs and even national economies, as witnessed immediately after the end of the recent Covid 19 pandemic when automakers faced intense component shortages and halted production. "Many an automobile sat on a warehouse lot waiting for a 'golden chip,' said Tom Hackenberg, principal analyst, computing and software at Yole, in a report. "MCUs are also critical in other ways. Safety and security are key functions for MCUs. While a complex vision/AI platform may be key to the next generation of self-driving vehicles, vehicle design today – and probably for generations to come – will rely on MCUs to control critical safety and engine systems as well as secure the network communications throughout the vehicle."

Even this glowing assessment of MCUs may be incomplete. As many as 4 out of 5 processors shipped in the electronics industry today are MCUs with the number continuing to inch higher. The advent of artificial intelligence will only further enhance the



"The fact that we have strengthened our position is proof of our superior product portfolio, software and easy-to-use development tools that exceed our customers' expectations,"

Andreas Urschitz, CMO, Infineon

usage of MCUs, observers said. Microcontroller suppliers have gained greater relevance and focus than even in the past, seeing opportunities in the growing demand for artificial intelligence devices, from data center equipment and especially from devices that have the capability to generate and process information at the source rather than in the cloud. Edge AI – one of its various appellations – represents the greatest opportunity in decades for microcontroller suppliers to widen their revenue streams. This was evident at the 2025 Embedded World Exhibition held in Nuremberg, Germany, in March. While most of the exhibitors demonstrated their AI-related offerings, MCU vendors led the charge. Everyone had Edge AI offerings, either hardware or software related. Press releases touting Edge AI MCUs kept flowing through the 3-day event, in addition to multiple demonstrations showing the products and the applications.

"We've gone beyond talking about Edge AI to showing devices and software programs supporting it" said Rich Simoncic, chief operating officer at Microchip Technology Inc., in an interview, during which he talked about the company's MPLAB AI coding assistant, a free tool the company is offering design engineers to support their product development activities. The Microchip tool is an interactive chatbot that the company said can trim product development time by 40 percent through code suggestions, assessment and tests. It can also connect



"We've gone beyond talking about Edge AI to showing devices and software programs supporting it"

Rich Simoncic, COO, Microchip Inc.

designers directly with additional resources and human support if required, Simoncic said. Microchip itself has been proactive in introducing AI to its workforce and has used it extensively internally resulting in most of its production activities now auto scheduled. "AI is so pervasive within Microchip now that we're starting to offer it to our distribution channels and customers on a website for coding improvements," Simoncic said.

Market share battle

Forecasters say demand for MCUs will grow at a low double-digit compounded annual rate over the next five years. MCU sales will rise to \$57 billion by 2030, from a projected \$35 billion for this year, according to Mordor Intelligence. As a result of projections like this, the battle for leadership of the MCU market has grown fierce with the top 3 vendors accounting for more than half of shipment and all jostling for leadership of the sector. The leadership of the segment changed late in 2024 with Infineon Technologies claiming the title of No. 1 for the first time, having slipped past fellow European vendor STMicroelectronics after the Geneva-based company's sales dropped on inventory correction. Infineon's MCU business has outperformed the market for many years, increasing 13 percent annually between 2015 and 2024, the Munich-based company said, in a report.

Citing Omdia, Infineon said its market share rose to 21.3 percent in 2024, from 17.8 percent, in the previous year. "The fact that we have strengthened our position is proof of our superior product portfolio, software and easy-to-use development tools that exceed our customers' expectations," said Andreas Urschitz, chief marketing officer and member of the management board of Infineon, in a statement. "Over the past decade, we have repeatedly outgrown the total market and gained market share by offering our customers highly functional

and efficient system solutions that are at the heart of many innovations that drive decarbonization and digitalization."

The microcontroller market has faced some turbulence in recent years due to weakening demand and inventory oversupply. Sales in the sector declined over the last several years due to reduced demand from the automotive and industrial sectors. Companies like Microchip and ST experienced double-digit sales declines and are still working on reducing inventories that had piled up on a surge in orders after the end of the Covid-19 pandemic. Infineon was also impacted but it avoided the worst of the storms because its exposure to the affected markets was not as deep. It was also shielded by its widening sales of microcontrollers outside of the automotive market to consumer, IoT and industrial OEMs. No supplier is immune from the vagaries of the market, though, which is why all microcontroller vendors are avidly exploring Edge AI opportunities.

Edge AI will give microcontroller suppliers even better insulation against the any future market weaknesses because their devices are finding a home in many more OEM equipment and in more segments of the electronics industry as well as in markets they already support. It will also help them avoid the conundrum of product commoditization as Chinese vendors enter the market, they said. "Over a third (38%) of all MCUs were shipped to Mainland China for assembly into a wide variety of electronic devices or subsystems before being shipped around the globe," said Hackenberg at Yole. "There has recently been a strong drive supported by China's government to decrease its dependence on foreign sources of critical semiconductor components, spawned by US trade sanctions on semiconductors and semiconductor manufacturing that could be used for advanced military applications."

2023 MICROCONTROLLER (MCU) DESIGNER RANKING

Source: Status of the Microcontroller Industry report, Yole Intelligence, 2024



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Buyers benefit from acquisition

In this article, Galco's president and CEO, Allison Sabia, explains the customer benefits emerging from the company's recent acquisition of Brozelco



Galco's president and CEO,
Allison Sabia

Q: How does the acquisition of Brozelco benefit electronics purchasing professionals?

» This acquisition enhances Galco's ability to strengthen relationships with strategic suppliers, while also providing comprehensive access to the combined product portfolios of both companies.

Each acquisition is approached uniquely to preserve existing value while uncovering new opportunities for both organizations

Q: Will this move also help buyers reduce lead times when ordering products?

» Galco maintains over 75,000 SKUs across its distribution centers. This robust stocking strategy lets the organization significantly reduce lead times by facilitating same-day order processing and shipment for in-stock items.

Q: Will the Brozelco brand remain in place?

» At this time, there are no plans to retire the Brozelco brand. Each acquisition is approached uniquely to preserve existing value while uncovering new opportunities for both organizations.

Q: Does the acquisition offer the opportunity to grow in new sectors?

» Brozelco is actively engaged in several sectors with significant growth potential, including rock quarry automation, mining, and utility switchyard refurbishment. These industries represent promising areas for continued expansion and strategic development.

www.galco.com
www.brozelco.com

Buyers' Guide

Manufacturer	Distributor	Telephone	Website	Franchised Distributor (Y/N/M)	No. of Lines for Principle	Stock Value for Principle	Minimum Order Value	% Lead Free for Principle Range	No. of Technical Support Staff	Total No. of Staff	Pack and Hold
CABLE & WIRING											
3M	Mouser Electronics	800-346-6873	www.mouser.com	Y	23,235	N/A	\$0	0.46	50	1,000+	Y
Alpha Wire	Mouser Electronics	800-346-6873	www.mouser.com	Y	8,106	N/A	\$0	93%	50	1,000+	Y
Belden Wire & Cable	Mouser Electronics	800-346-6874	www.mouser.com	Y	5,863	N/A	\$0	97%	50	1,000+	Y
Molex	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
TE Connectivity	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
CIRCUIT PROTECTION											
Bourns	Mouser Electronics	800-346-6873	www.mouser.com	Y	4,462	N/A	\$0	68%	50	1,000+	Y
Eaton	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
EPCOS	Mouser Electronics	800-346-6873	www.mouser.com	Y	3,487	N/A	\$0	100%	50	1,000+	Y
KYOCERA AVX	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
KYOCERA AVX	Digi-Key	800-344-4539	www.digikey.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
Littelfuse	Mouser Electronics	800-346-6873	www.mouser.com	Y	28,790	N/A	\$0	67%	50	1,000+	Y
Schurter	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Vishay	Mouser Electronics	800-346-6873	www.mouser.com	Y	31,445	N/A	\$0	68%	50	1,000+	Y
DISPLAYS & LEDs											
BIVAR	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Broadcom	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Cree LED	Mouser Electronics	800-346-6873	www.mouser.com	Y	12,390	N/A	\$0	99%	50	1,000+	Y
Dialight	Mouser Electronics	800-346-6873	www.mouser.com	Y	6,179	N/A	\$0	84%	50	1,000+	Y
Displaytech	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Hantronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Kingbright Company, LLC	Mouser Electronics	800-346-6873	www.mouser.com	Y	301	N/A	\$0	100%	50	1,000+	Y
Lumileds	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Luminus	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Newhaven Display	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
ams OSRAM	Mouser Electronics	800-346-6873	www.mouser.com	Y	1,690	N/A	\$0	100%	50	1,000+	Y
Tianma	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
ELECTROMECHANICAL											
ALPS	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Apem, Inc.	Mouser Electronics	800-346-6873	www.mouser.com	Y	4,326	N/A	\$0	83%	50	1,000+	Y
E-Switch	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Grayhill	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Honeywell	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Keystone Electronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Littelfuse	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Littelfuse	TME	678-691-2347 678-691-5147	tme.com	Y	8,520	N/A	\$0	N/A	N/A	1,500	Y
Nidec	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
NKK Switches	Mouser Electronics	800-346-6873	www.mouser.com	Y	13,976	N/A	\$0	86%	50	1,000+	Y
Omron	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Panasonic	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Phoenix Contact	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
PUI Audio	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Schneider Electric	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Sensata	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
TE Connectivity	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Teledyne Relays	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
ENCLOSURES											
Bud Industries	Mouser Electronics	800-346-6873	www.mouser.com	Y	1,325	N/A	\$0	80%	50	1,000+	Y
Hammond Manufacturing	Mouser Electronics	800-346-6873	www.mouser.com	Y	2,839	N/A	\$0	82%	50	1,000+	Y
METCASE Enclosures	OKW Enclosures, Inc.	(800) 965-9872	www.metcaseusa.com		322	N/A	\$0	N/A	10	20	Y
New Age Enclosures	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
OKW Gehäusesysteme GmbH	OKW Enclosures, Inc.	(800) 965-9872	www.okwenclosures.com		2,450	N/A	\$0	N/A	10	20	Y
ROLEC Gehäuse-Systeme GmbH	ROLEC Enclosures Inc	(888) 658-5774	www.rolec-usa.com		1,960	N/A	\$0	N/A	4	6	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
FREQUENCY MANAGEMENT											
Abrakon Corporation	Mouser Electronics	800-346-6873	www.mouser.com	Y	1,780	N/A	\$0	100%	50	1,000+	Y
CTS Electronic Components	Mouser Electronics	800-346-6873	www.mouser.com	Y	3,889	N/A	\$0	100%	50	1,000+	Y
ECS Inc	Mouser Electronics	800-346-6873	www.mouser.com	Y	2,070	N/A	\$0	100%	50	1,000+	Y
Epson Toyocom	Mouser Electronics	800-346-6873	www.mouser.com	Y	178	N/A	\$0	100%	50	1,000+	Y
IQD Frequency Products	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
KYOCERA AVX	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y

Buyers' Guide

Manufacturer	Distributor	Telephone	Website	Franchised Distributor (Y/N)	No. of Lines for Principle	Stock Value for Principle	Minimum Order Value	% Lead Free for Principle Range	No. of Technical Support Staff	Total No. of Staff	Pack and Hold
KYOCERA AVX	Digi-Key	800-344-4539	www.digikey.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
SiTime	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
ICs & SEMICONDUCTORS											
Analog Devices, Inc	Mouser Electronics	800-346-6873	www.mouser.com	Y	18,749	N/A	\$0	95%	50	1,000+	Y
Broadcom Limited	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Central Semiconductor	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Central Semiconductor Corp.	Future Electronics	(800) 675-1619	www.futureelectronics.com	Y	N/A	N/A	N/A	N/A	N/A	N/A	Y
Digi International	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Diodes Incorporated	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
FTDI Chip	Mouser Electronics	800-346-6873	www.mouser.com	Y	94	N/A	\$0	100%	50	1,000+	Y
Infineon	Mouser Electronics	800-346-6873	www.mouser.com	Y	1,580	N/A	\$0	63%	50	1,000+	Y
Intel	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
ISSI	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Lattice	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Littelfuse	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
MACOM	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Maxim Integrated	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Microchip	Mouser Electronics	800-346-6873	www.mouser.com	Y	5,800	N/A	\$0	100%	50	1,000+	Y
Microchip	TME	678-691-2347 678-691-5147	tme.com	Y	632	N/A	\$0	N/A	N/A	1500	Y
Monolithic Power Systems (MPS)	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Nexperia	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
NXP	Mouser Electronics	800-346-6873	www.mouser.com	Y	7,205	N/A	\$0	100%	50	1,000+	Y
onsemi	Mouser Electronics	800-346-6873	www.mouser.com	Y	7,486	N/A	\$0	96%	50	1,000+	Y
Power Integrations	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Qorvo	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Renesas Electronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
ROHM Semiconductor	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Silicon Laboratories Inc	Mouser Electronics	800-346-6873	www.mouser.com	Y	1,141	N/A	\$0	100%	50	1,000+	Y
Skyworks	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
ST Microelectronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	8,145	N/A	\$0	96%	50	1,000+	Y
Swissbit	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Texas Instruments	Mouser Electronics	800-346-6873	www.mouser.com	Y	29,676	N/A	\$0	94%	50	1,000+	Y
Toshiba	Mouser Electronics	800-346-6873	www.mouser.com	Y	800	N/A	N/A	N/A	N/A	N/A	Y
Vishay	Mouser Electronics	800-346-6873	www.mouser.com	Y	53,781	N/A	\$0	77%	50	1,000+	Y
Wolfspeed	Mouser Electronics	800-346-6873	www.mouser.com	Y	53,781	N/A	\$0	77%	50	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
INTERCONNECTION											
3M	Mouser Electronics	800-346-6873	www.mouser.com	Y	23,235	N/A	\$0	46%	50	1,000+	Y
Amphenol	Mouser Electronics	800-346-6873	www.mouser.com	Y	165,853	N/A	\$0	31%	50	1,000+	Y
Anderson Power Products	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Apvite (Delphi)	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Cinch Connectivity/Bel	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Eaton	Mouser Electronics	800-346-6873	www.mouser.com	Y	10,744	N/A	\$0	27%	50	1,000+	Y
ERNI Electronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Glenair	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Harting	Mouser Electronics	800-346-6873	www.mouser.com	Y	2,160	N/A	\$0	51%	50	1,000+	Y
Harwin	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Hirose Electric	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
ITT Cannon	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
JAE Electronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	6,02	N/A	\$0	100%	N/A	N/A	Y
JST	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
KYOCERA AVX	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
KYOCERA AVX	Digi-Key	800-344-4539	www.digikey.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
LEMO	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Mill-Max	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Molex	Mouser Electronics	800-346-6873	www.mouser.com	Y	85,634	N/A	\$0	89%	50	1,000+	Y
Neutrik	Mouser Electronics	800-346-6873	www.mouser.com	Y	1,563	N/A	\$0	100%	50	1,000+	Y
NorComp	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Phoenix Contact	Mouser Electronics	800-346-6873	www.mouser.com	Y	30,044	N/A	\$0	77%	50	1,000+	Y
Radiall	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Samtec	Mouser Electronics	800-346-6873	www.mouser.com	Y	123,613	N/A	\$0	69%	50	1,000+	Y
Switchcraft Corporation	Mouser Electronics	800-346-6873	www.mouser.com	Y	300	N/A	\$0	55%	50	1,000+	Y
TE Connectivity	Mouser Electronics	800-346-6873	www.mouser.com	Y	123,613	N/A	\$0	69%	50	1,000+	Y
OBsolescence / Hard to Find											
	Lansdale	602-438-0123	lansdale.com	Y							
	Rochester Electronics	978-462-9332	www.rocelec.com	Y		N/A	\$250		10	800+	Y

Buyers' Guide

Manufacturer	Distributor	Telephone	Website	Franchised Distributor (Y/N/M)	No. of Lines for Principle	Stock Value for Principle	Minimum Order Value	% Lead Free for Principle Range	No. of Technical Support Staff	Total No. of Staff	Pack and Hold
OPTO ELECTRONICS											
Broadcom	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Cree LED	Mouser Electronics	800-346-6873	www.mouser.com	Y	582	N/A	\$0	99%	50	1,000+	Y
Finisar	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
ams OSRAM	Mouser Electronics	800-346-6873	www.mouser.com	Y	1,927	N/A	\$0	99%	50	1,000+	Y
ROHM Semiconductor	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Vishay	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
PASSIVES											
ABRACON	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Bourns	Mouser Electronics	800-346-6873	www.mouser.com	Y	38	N/A	\$0	78%	50	1,000+	Y
Cornell Dubilier	Mouser Electronics	800-346-6873	www.mouser.com	Y	24,145	N/A	\$0	71%	50	1,000+	Y
Coilcraft	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
EPCOS	Mouser Electronics	800-346-6873	www.mouser.com	Y	26,533	N/A	\$0	98%	50	1,000+	Y
Fair-Rite	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
KEMET	Mouser Electronics	800-346-6873	www.mouser.com	Y	77,568	N/A	\$0	66%	50	1,000+	Y
KOA Speer	Mouser Electronics	800-346-6873	www.mouser.com	Y	34,078	N/A	\$0	58%	50	1,000+	Y
KYOCERA AVX	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
KYOCERA AVX	Digi-Key	800-344-4539	www.digikey.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
Murata	Mouser Electronics	800-346-6873	www.mouser.com	Y	33,780	N/A	\$0	99%	50	1,000+	Y
Murata	TME	678-691-2347	www.tme.com	Y	39,115	N/A	\$0	N/A	N/A	1,500	Y
Nichicon	Mouser Electronics	800-346-6873	www.mouser.com	Y	20,389	N/A	\$0	84%	50	1,000+	Y
Ohmite	Mouser Electronics	800-346-6873	www.mouser.com	Y	14,293	N/A	\$0	55%	50	1,000+	Y
Panasonic Electronic Components	Mouser Electronics	800-346-6873	www.mouser.com	Y	14,948	N/A	\$0	100%	50	1,000+	Y
Taiyo Yuden	Mouser Electronics	800-346-6873	www.mouser.com	Y	4,620	N/A	\$0	98%	50	1,000+	Y
TE Connectivity	Mouser Electronics	800-346-6873	www.mouser.com	Y	6,663	N/A	\$0	100%	50	1,000+	Y
TDK	Mouser Electronics	800-346-6873	www.mouser.com	Y	6,663	N/A	\$0	100%	50	1,000+	Y
TT Electronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
United Chemi-Con (UCC)	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Vishay	Mouser Electronics	800-346-6873	www.mouser.com	Y	102,917	N/A	\$0	64%	50	1,000+	Y
Würth	Mouser Electronics	800-346-6873	www.mouser.com	Y	934	N/A	\$0	99%	50	1,000+	Y
Yageo Corporation	Mouser Electronics	800-346-6873	www.mouser.com	Y	18,246	N/A	\$0	100%	50	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
POWER & BATTERIES											
Artesyn Embedded Technologies	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
B&K Precision	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Cincon	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Cosel	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
CUI Inc.	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Delta Electronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
MEAN WELL	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Murata	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Phihong	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Phoenix Contact	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
RECOM	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Schaffner	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
SL Power	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Texas Instruments	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
TDK Lambda	Mouser Electronics	800-346-6873	www.mouser.com	Y	405	N/A	\$0	80%	N/A	N/A	Y
TRACO Power	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Vicor	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
XP Power	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
SENSORS											
ams OSRAM	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Amphenol	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Analog Devices Inc.	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Bosch	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Honeywell	Mouser Electronics	800-346-6873	www.mouser.com	Y	12,059	N/A	\$0	64%	50	1,000+	Y
KYOCERA AVX	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
KYOCERA AVX	Digi-Key	800-344-4539	www.digikey.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
Littlefuse	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Melexis	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Microchip	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
NXP	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
onsemi	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Omron	Mouser Electronics	800-346-6873	www.mouser.com	Y	4,915	N/A	\$0	59%	50	1,000+	Y
Renesas	Mouser Electronics	800-346-6873	www.mouser.com	Y	4,915	N/A	\$0	59%	50	1,000+	Y
Sensirion	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
STMicroelectronics	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
TDK	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y

Manufacturer	Distributor	Telephone	Website	Franchised Distributor (Y/N/M)	No. of Lines for Principle	Stock Value for Principle	Minimum Order Value	% Lead Free for Principle Range	No. of Technical Support Staff	Total No. of Staff	Pack and Hold
TE Connectivity	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Texas Instruments	Mouser Electronics	800-346-6873	www.mouser.com	Y	914	N/A	\$0	65%	50	1,000+	Y
Vishay	Mouser Electronics	800-346-6873	www.mouser.com	Y	914	N/A	\$0	65%	50	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
SWITCHES & KEYBOARDS											
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
TEST & MEASUREMENT											
B&K Precision	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Fluke	Mouser Electronics	800-346-6873	www.mouser.com	Y	1,008	N/A	\$0	94%	50	1,000+	Y
Keysight	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Lascar Electronics		814-835-0621	www.lascarelectronics.com	Y	130	\$602,000	\$0	100%	10	175	Y
Tektronix	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50	1,000+	Y
Teledyne LeCroy	Mouser Electronics	800-346-6873	www.mouser.com	Y	194	N/A	\$0	96%	50	1,000+	Y
THERMAL MANAGEMENT											
ebm-papst	Mouser Electronics	800-346-6873	www.mouser.com	Y	194	N/A	\$0	96%	50	1,000+	Y
Sanyo Denki	Mouser Electronics	800-346-6873	www.mouser.com	Y	194	N/A	\$0	96%	50	1,000+	Y
CUI Devices	Mouser Electronics	800-346-6873	www.mouser.com	Y	194	N/A	\$0	96%	50	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	
WIRELESS SOLUTIONS											
KYOCERA AVX	Mouser Electronics	800-346-6873	www.mouser.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
KYOCERA AVX	Digi-Key	800-344-4539	www.digikey.com	Y	N/A	N/A	\$0	N/A	50+	1,000+	Y
	TME	+48 42 645 55 55	www.tme.com				-			1,400	

Contract Manufacturers Buyers' Guide

Manufacturer	Telephone	Website	Turnover	Location	Employees	Number of Surface Mount Lines	Approvals	BGA Capacity	Lead Free Manufacturer	Prototyping	Design Capability	Full Turnkey	Cables and Harnessing
Alan Anderson Manufacturing Ltd	+44 (0) 333 322 7222	www.aa-manufacturing.co.uk	£21m	Hertfordshire UK	40	2	ISO9001:2015 ,IPC-A-610	Y	Y	Y	Y	Y	Y



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- Diamond Award, Americas
- Best Quality, Americas

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Award Winners

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RAB4 – RTK

Rutronik Adapter Board for absolute and relative distance measurements

RAB 1 – Sensor Fusion

Intelligent sensor fusion for measuring physical environmental variables based on machine learning



RAB2 – CO2 sensing

Evaluation of CO2 sensors for relative humidity and temperature measurements