

HARWIN

CONNECT TECHNOLOGY
WITH CONFIDENCE

CONNECTING WITH **EUROPE**

2026 EUROPEAN CONNECTOR
SPECIFIER AND BUYER SURVEY

WWW.HARWIN.COM

INTRODUCTION

2



Welcome to 'Connecting with Europe', Harwin's first annual survey of the European connectors market in which we explore the trends and technologies influencing this critical sector.

This survey provides insight from a broad cross-section of professionals involved in interconnect specification, design and procurement. Respondents included engineers, buyers and executive management in sectors ranging from aerospace and telecoms to industrial and automotive.

Through the survey we have examined the most important applications for connectors, the technologies being chosen and the criteria for making those choices in terms of both products and suppliers.



We also investigated the importance of online tools and advanced technologies such as AI and 3D printing, as well as the information sources that specifiers and buyers use to make effective connector choices.

What is clear is that connectors – and, not least, highly reliable connectors – remain absolutely fundamental to the successful design and manufacture of electronic products across industrial systems, telecoms & data and automotive / EV.

We hope you find this survey of interest. Should you have any questions or want to discuss any aspect of this report do not hesitate to contact us.

Peter Schneid, Vice President of Marketing

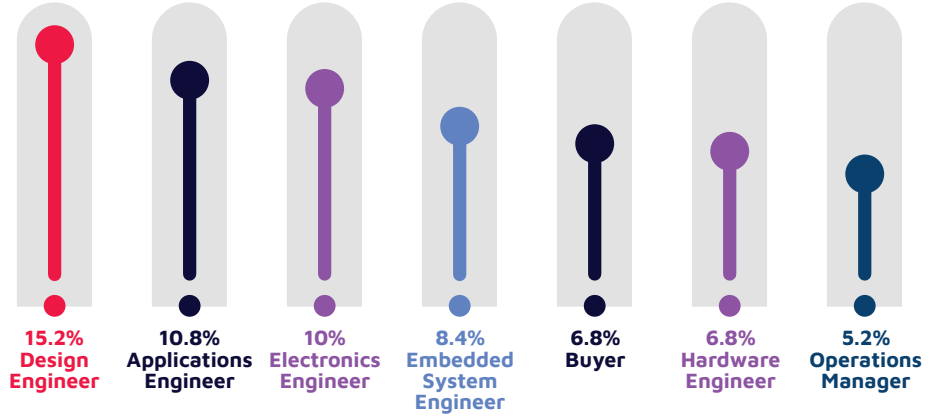


WHO RESPONDED?

Conducted during April 2026, the survey collated and analyzed responses from European professionals working across engineering, procurement and management.

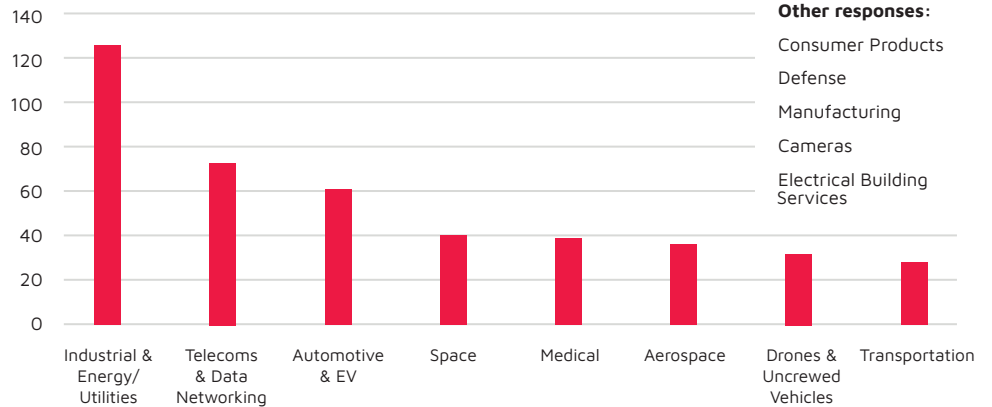
All of those who responded had connector specification or procurement within their remit, with over 40% stating it as their primary focus. More than 75% had been involved in the sourcing of connectors in the last six months and almost 90% within the last year.

TOP JOB ROLES

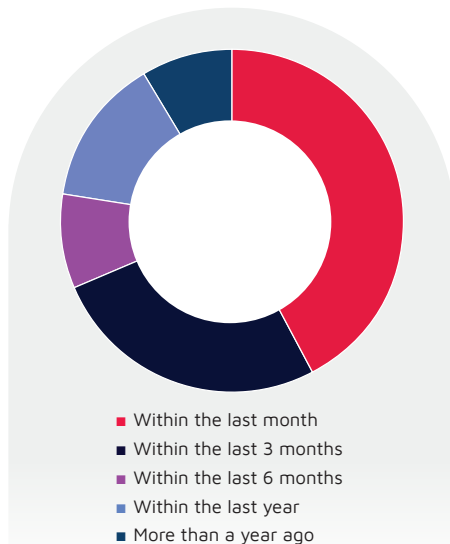


Respondents were involved in a diverse range of industries with industrial, telecoms and data networking the leading applications for connector design and specification.

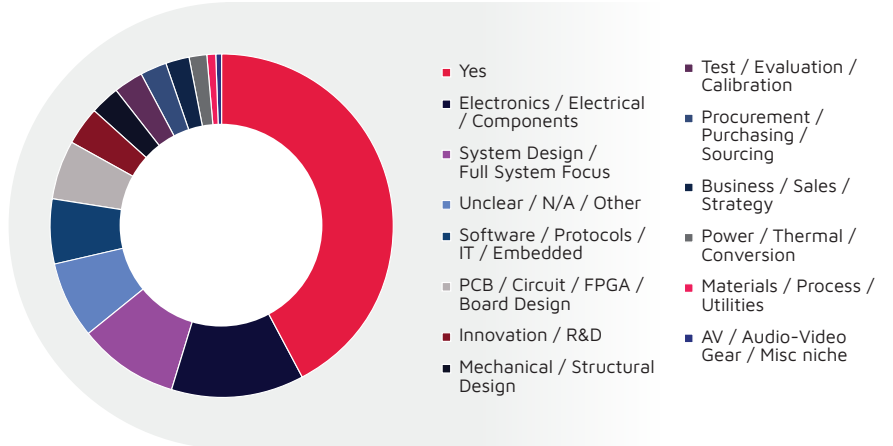
WHICH APPLICATIONS?



LAST BOUGHT CONNECTORS?



IS CONNECTOR SELECTION AND DESIGN-IN YOUR PRIMARY FOCUS? IF NO, WHAT IS YOUR PRIMARY FOCUS?



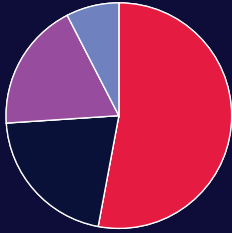
CHOOSING CONNECTORS AND SUPPLIERS

4

The survey considered the complete spectrum of connector types, with high-reliability connectors being seen as critical for the vast majority of respondents.

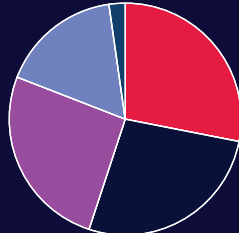
Connectors for power (low, medium and high) and data (low, mid and high) were the most specified or purchased by respondents.

POWER/CURRENT

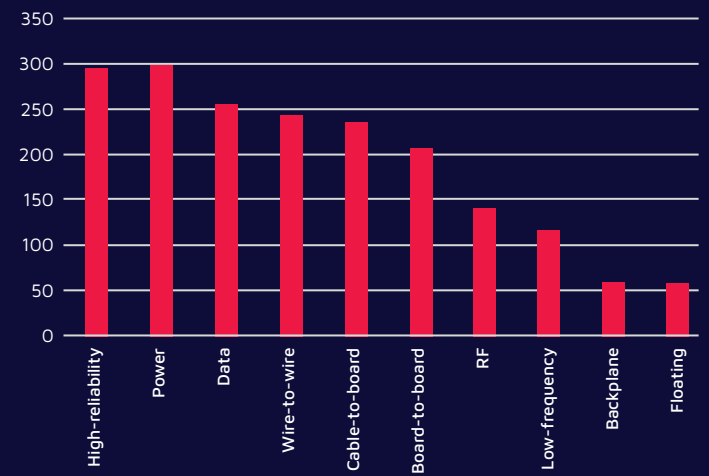


- Low Power (0-30A / under 100W)
- High Power (100A+ / 1kW+)
- Medium Power (30-100A / 100-1000W)
- Mixed / Ranges / Custom

DATA



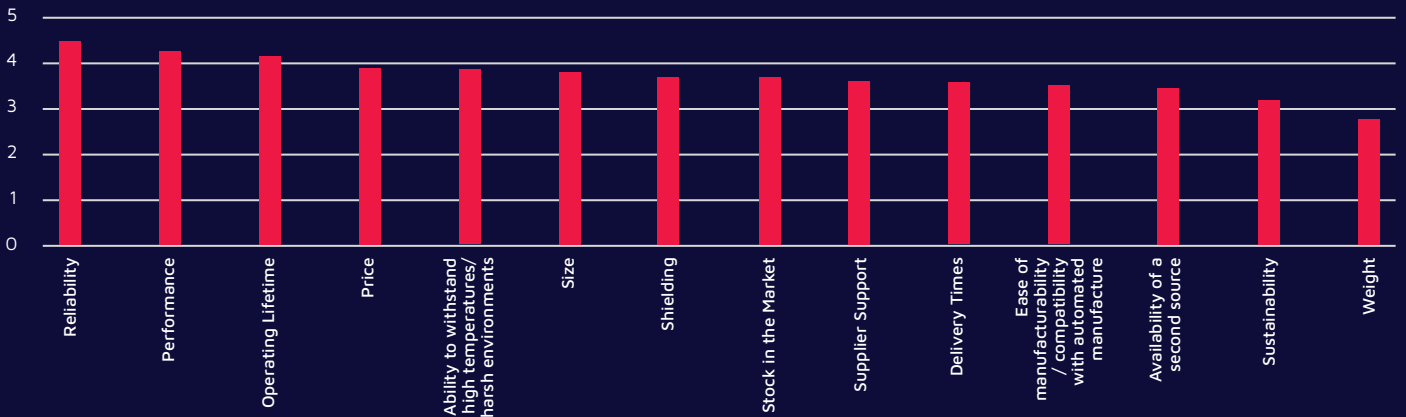
- Mid speed (Between 100 Mbps and 1 Gbps)
- Low speed (Below 100 Mbps, Kbps, Baud rates)
- High speed (Greater than 1 Gbps)
- Frequency based / GHz ranges
- Protocol / standard-based (USB, Ethernet, etc.)



When it comes to reliability, over 40% of the professionals surveyed expected their connectors to operate for more than ten years and a further 33% for between five and ten years.

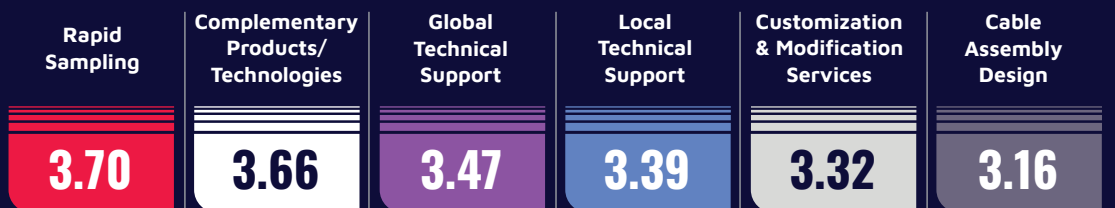
This focus on reliability was underlined when it comes to primary considerations for selecting and procuring connectors with reliability being the top criteria, closely followed by performance and operating life.

PRIMARY CONSIDERATIONS



MOST IMPORTANT CRITERIA?

In terms of selecting a supplier, rapid sampling was seen as particularly important, closely followed by availability of complementary products and global technical support.



(Average scores out of five)

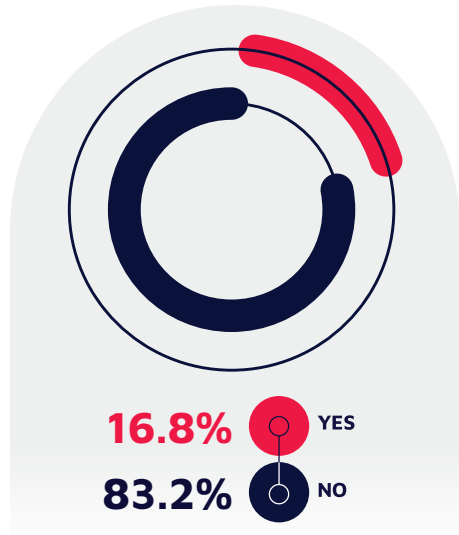


ONLINE TOOLS

Just over one third of respondents (36.8%) said that they currently use or plan to use online design tools as part of the selection and design-in process.

The most important factors when using such tools are the ability to download files for use in design software and the availability of resources for product comparison and selection. Online customization, configuration and simulation also ranked highly.

WHO USES AI AND SOLUTIONS SUCH AS 'DIGITAL TWINS' FOR DESIGN AND OPTIMIZATION?

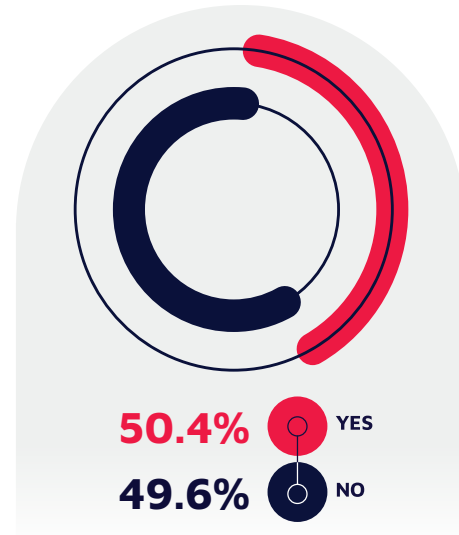


Our survey found that a number of professionals are now using Artificial Intelligence (AI) in their day-to-day work, though the majority are yet to deploy AI-based technologies for design and optimization.

Of those respondents that had adopted AI, the areas in which it was proving useful included:

- Early prediction of performance and reliability
- Simulation of connector and cable operation under various electrical, thermal, and mechanical conditions
- Optimizing PCB layout
- Automating test and speeding validation
- Increasing manufacturing throughput
- Predictive maintenance

DO YOU USE OR PLAN TO USE 3D PRINTING FOR PROTOTYPING OR PRODUCTION?



This year's survey found that over half of respondents use or plan to use 3D printing.

Among the reasons cited for adopting this technology are:

- Rapid prototyping (including housings, routing guides and enclosures)
- Accelerated design testing and verification
- Reduced customization times
- Testing fit, form and function
- Small-scale production

These results underline just how important it is that suppliers align their strategies to provide the tailored support that customers are coming to expect when deploying advanced digital technologies that speed design, testing and production.

KEY TAKEAWAYS

36.8% of specifiers and buyers in Europe report using online design tools, compared to 54% of users in North America (Harwin 'Connecting with North America' survey). Take-up of AI was also higher in North America, with 26.4% of respondents saying they were already using it for design and optimisation.

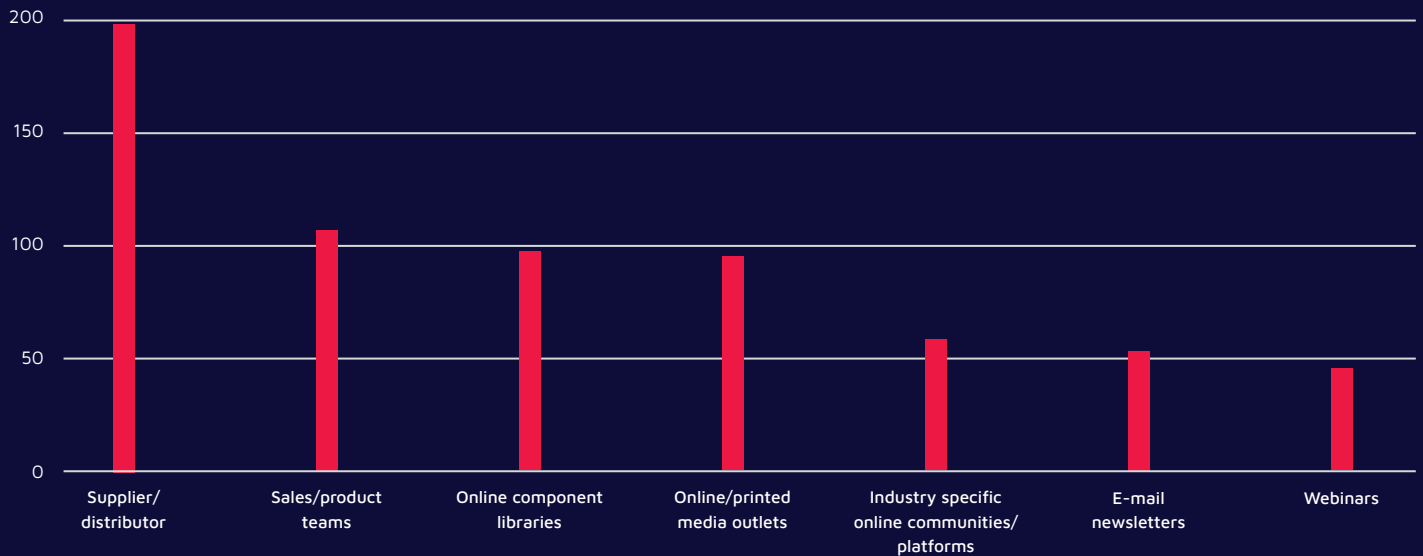
However, Europe appears to be ahead in 3D printing, with only 34% of North American respondents saying they use or plan to use it for prototyping or production.

SOURCING INFORMATION AND BUYING CONNECTORS

6

The survey indicates that the resources of connector manufacturers and their distribution partners continue to be key for information relating to product specification and ordering. This is followed by sales and product teams (who are often contacted after initial online research).

HOW DO YOU SOURCE INFORMATION FOR CONNECTION SPECIFICATION/ORDERING?



Given the increase in AI-driven search, we can realistically conclude that a growing number of manufacturer and distributor websites are being found via more sophisticated online searches - including those from users who are actively seeking solutions to design challenges rather than specific products.

With this in mind, it has never been more important for supplier and distributor websites to go beyond simply providing product data to including authoritative information, guidance and tools that simplify and speed identification, comparison, selection and ordering.

TOP DISTRIBUTORS

The survey identified the top three preferred distributors **Mouser**, **DigiKey** and **Farnell**.



SOME KEY CHALLENGES

Most respondents think their role will become more challenging in the future, with only around 12% believing their role will become easier.

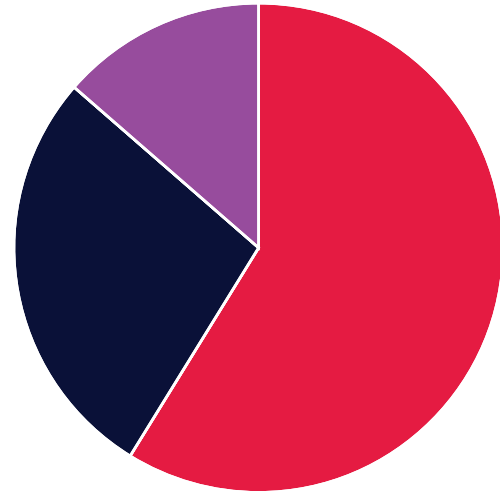
HOW DO YOU SEE YOUR ROLE CHANGING IN THE FUTURE?

For many, a significant challenge in modern engineering projects is sourcing connectors that meet both technical and commercial requirements. Here respondents referred to the need to balance electrical and mechanical performance, reliability and size while ensuring product availability.

Indeed, availability and lead times were a concern for a number of specifiers and purchasers due to the possibility of supply chain issues causing disruptions that necessitate re-designs or delays.

Another recurring theme was the challenge of delivering long-term reliability by selecting connectors that can withstand 'real-world' or harsh operating conditions (including vibration, heat, moisture and repeated mating) while still meeting space, performance, and cost constraints.

Miniaturization is another common challenge, not least when selecting connectors that must maintain signal integrity at higher data rates.



- More challenging
- No change
- Less challenging

RESPONDEE FEEDBACK

RELIABILITY PERFORMANCE COMPATIBILITY
MOISTURE **TEMPERATURE** MATING CYCLES
CHALLENGING ENVIRONMENTS **AVAILABILITY**
LEAD TIMES MINIATURIZATION

HARWIN

CONNECT TECHNOLOGY
WITH CONFIDENCE



HRI
RANGE



BBI
RANGE



Ezi
RANGE

FOR FURTHER INFORMATION PLEASE CONTACT:
SUPPORT@HARWIN.COM

—○ WWW.HARWIN.COM