

EDA State of the Sector Survey Manufacturer Feedback: Q2 2026 (April 2026)





State of the Sector Survey Manufacturer Feedback: Q2 2026

Introduction

These are the results of the Q2 2026 EDA State of the Sector Survey with Manufacturer responses.

There is a separate survey for EDA Wholesalers.

This survey attracted 41 responses, a 35% response rate. On 1 April 2026 the EDA had 118 manufacturer affiliates.

A summary of wholesaler and manufacturer feedback was shared at our Talking Shop Live Online on Friday 24 April 2026.

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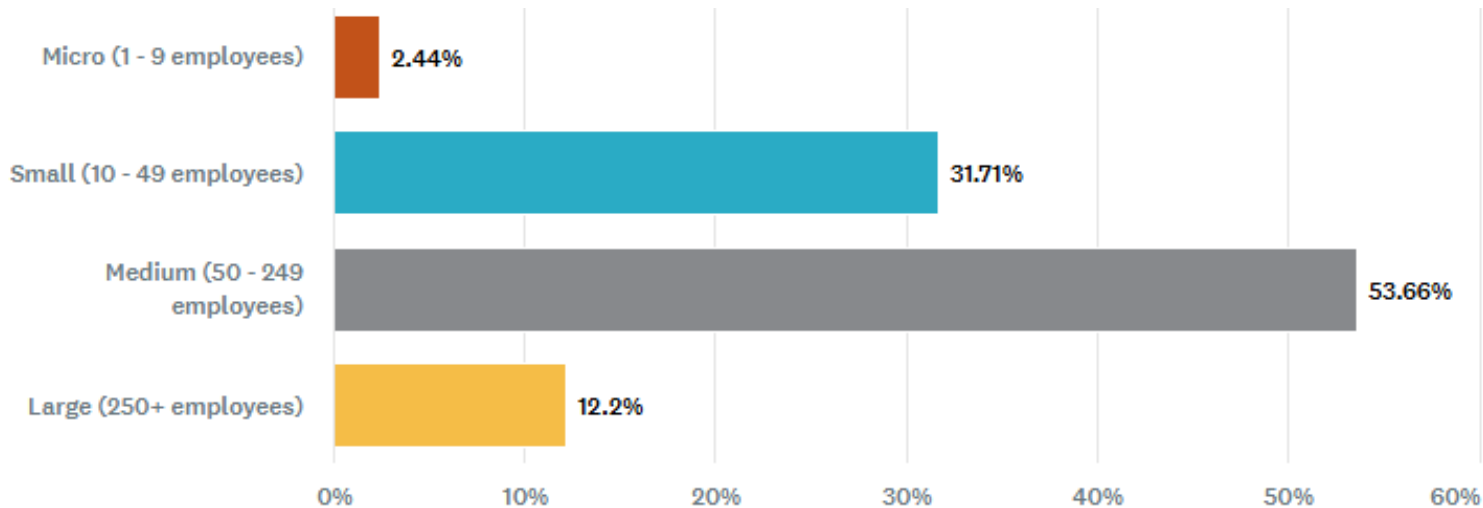
[Q24: Comments on product supply.](#)

[Q25: How to you anticipate sales volumes \(like for like sales\) will change during Q2 2026?](#)

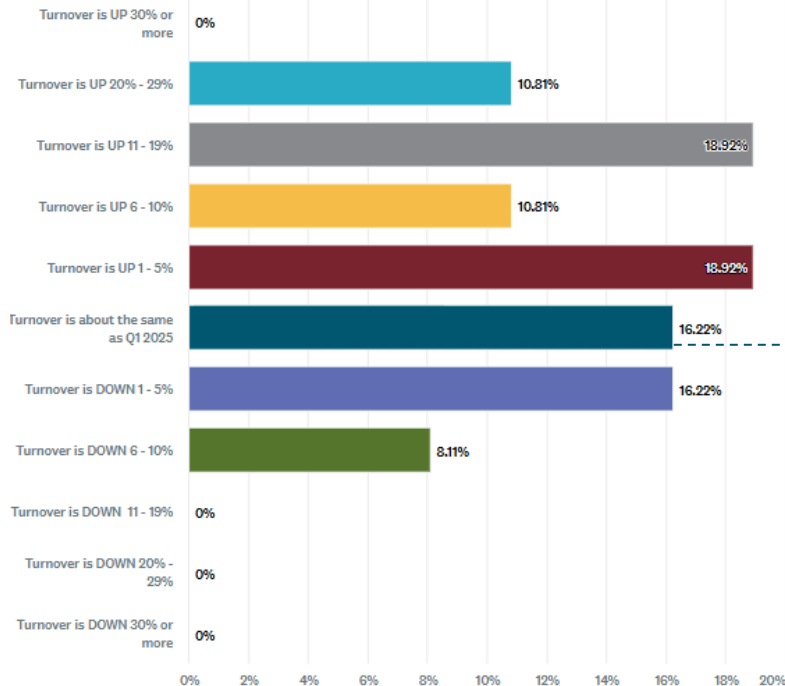
[Q26: How to you anticipate sales volumes \(like for like sales\) will change during 2026?](#)



Q1: Please tell us the size of your business



Q2: Please tell us how your turnover in Q1 2026 compares with turnover in Q1 2025.



30% said t/o up 11% or more
(previous survey: 27%)

59% said t/o up
(previous survey: 66%)

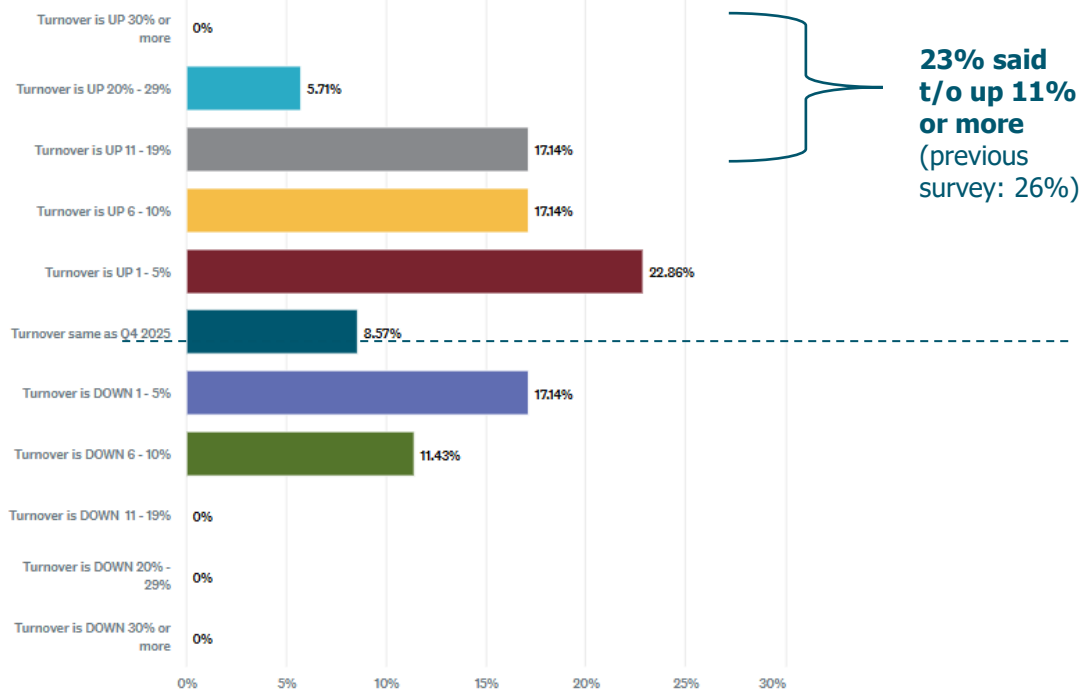
24% said t/o down
(previous survey: 22%)

“2026 has closed as a Record Q1”

“Poor January, business improved in February and March. Concerned about April due to consumer confidence.”



Q3: Please tell us how your turnover in Q1 2026 compares with turnover in Q4 2025.



23% said t/o up 11% or more (previous survey: 26%)

63% said t/o up (previous survey: 66%)

“We don't compare. This include no account of reasonability and would be misleading.”

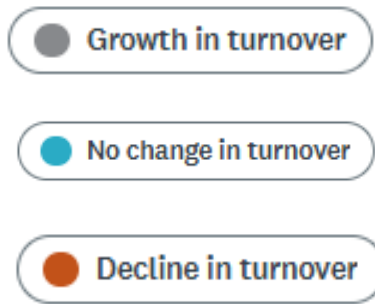
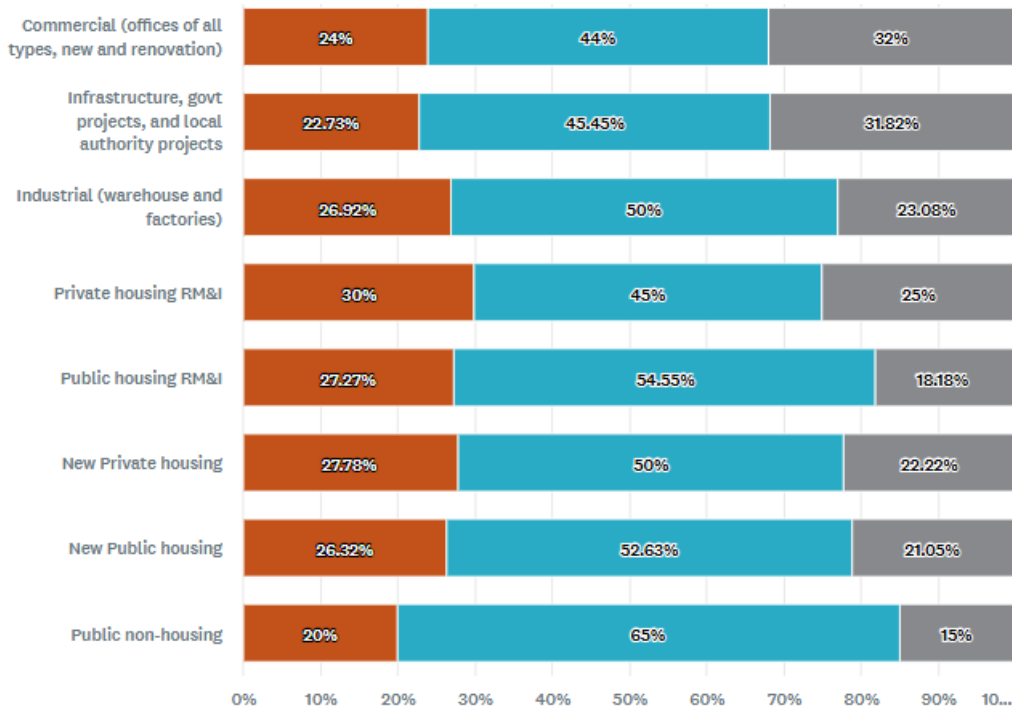
29% said t/o down (previous survey: 22%)

“This is a typical year on year trend for our business.”

“Q4 is our busiest period due to seasonality.”



Q4: Have you experienced a change in turnover in Q1 2026 compared to Q4 2025 for the following sectors? Ranked by growth (grey band).





Q4: Comments on particular areas of growth

“Generally we are informed that the sectors we interact with are down. If we grow sales in a period our concern is we are overstocking our customers leading to future slow sales months.”

“Renewables.”

“Data centres continue to grow, both in the UK & Globally.”

“Due to a bulk stock order that we are up.”

Q5: Your Operational Challenges: from a prompted list please tell us which 5 operational challenges are your most pressing at this time?

	January 2025	April 2025	July 2025	October 2025	January 2026
1	Inflation in business overheads and passing these on to customers	Upward pressure on all wages driven by the increases in National Living Wage and National Minimum Wage on my overall wage bill	Slowdown in the start of projects + Upward pressure on all wages driven by the increases in National Living Wage and National Minimum Wage on my overall wage bill	Increasing business overheads + Delays to project starts	Increasing business overheads
2	Upward pressure on all wages driven by the increases in National Living Wage and National Minimum Wage on my overall wage bill + A general downturn in demand	The slowdown in my traditional market segments	Inflation in business overheads	Downturn in market demand	Downturn in market demand
3	Product price deflation	Inflation in business overheads	The slowdown in my traditional market segments	Difficulties attracting, recruiting or retaining staff	Delays to project starts + The slowdown in my traditional market segments
4			Transport and logistics costs + Difficulties attracting and recruiting staff	The slowdown in my traditional market segments	Difficulties attracting, recruiting or retaining staff
5			Product price deflation	New competitors entering the market	New competitors entering the market

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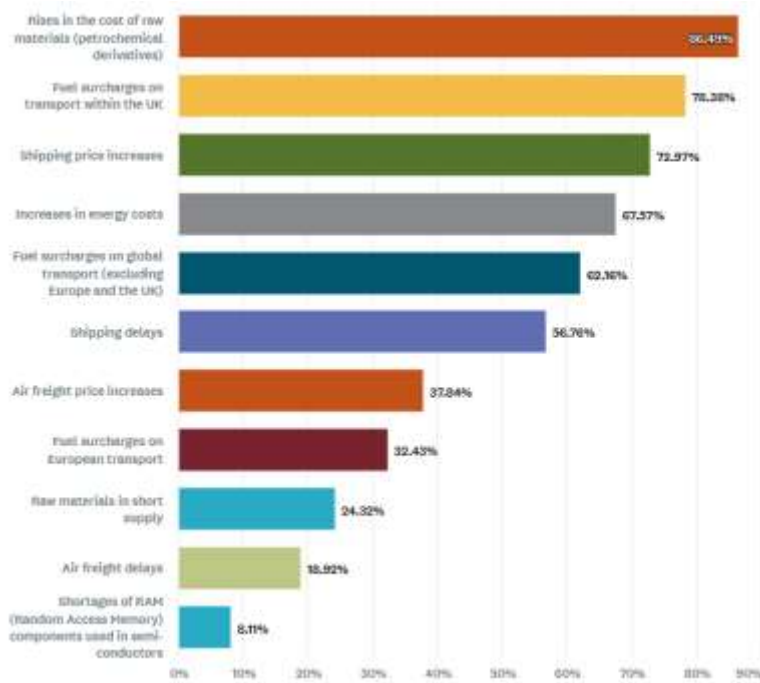




Q5: Comments on operational challenges

“We are concerned about customer debt, even if we are paid this does lead to de-stocking. Project delays can always be an issue.”

Q6: As a result of the Middle East conflict, which of the following have you experienced? Please tick all that apply.



“Just adds more uncertainty to an already fragile level of investor confidence.”

“Customer confidence.”

“Lowering of consumer confidence.”

“Uncertainty with customers.”

“Travel to FE is more difficult.”

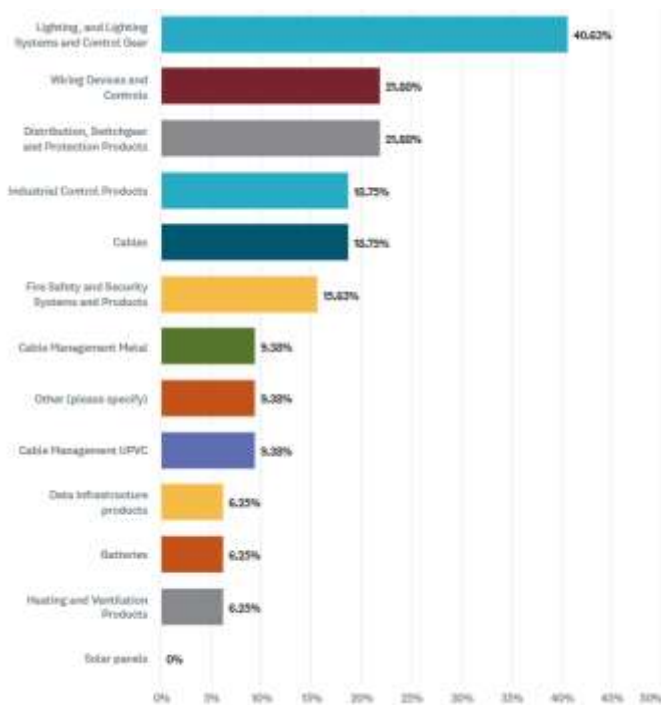


Q7: What raw materials are most at risk or are already in short supply?

- Steel
- Electronics
- Oil is a key component in the production of PVC / Plastics (multiple responses)
- Metal die casting
- Precious metals
- **Tungsten** is where we are seeing significant increases
- Electronic components supply was already under pressure. Whether the conflict is used as an excuse for further delays remains to be seen.
- European copper lead times increasing weekly, all now 26wk
- Resins
- Aluminium

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Q8: Which of your product types are most likely to be impacted by the conflict in the Middle East? Please tick all that apply?



“The majority of our products use electronic components.”

“Raw materials”

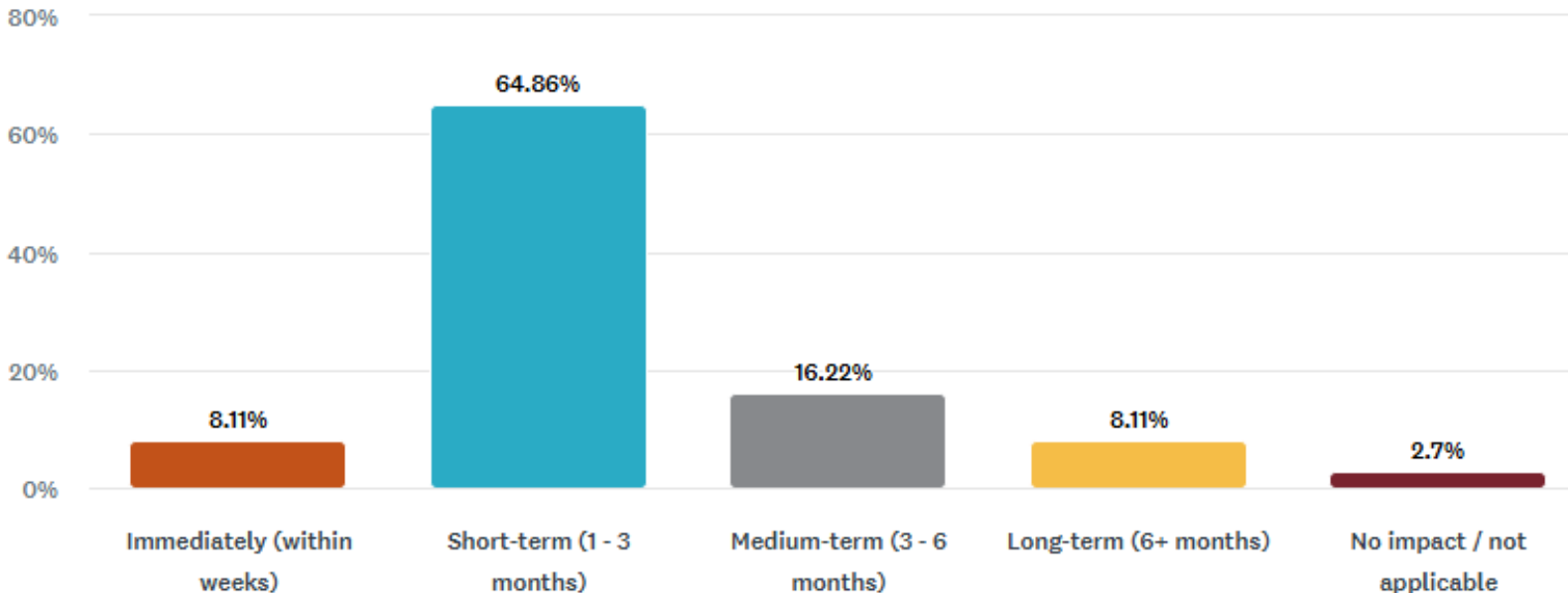
“All of them!”

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Electrical Distributors' Association Rotherwick House, 3 Thomas More Street, St Katharine's and Wapping, London E1W 1YZ • T: 020 3141 7350 • E: info@eda.org.uk • www.eda.org.uk



Q9: How quickly do oil price changes feed into your production costs?

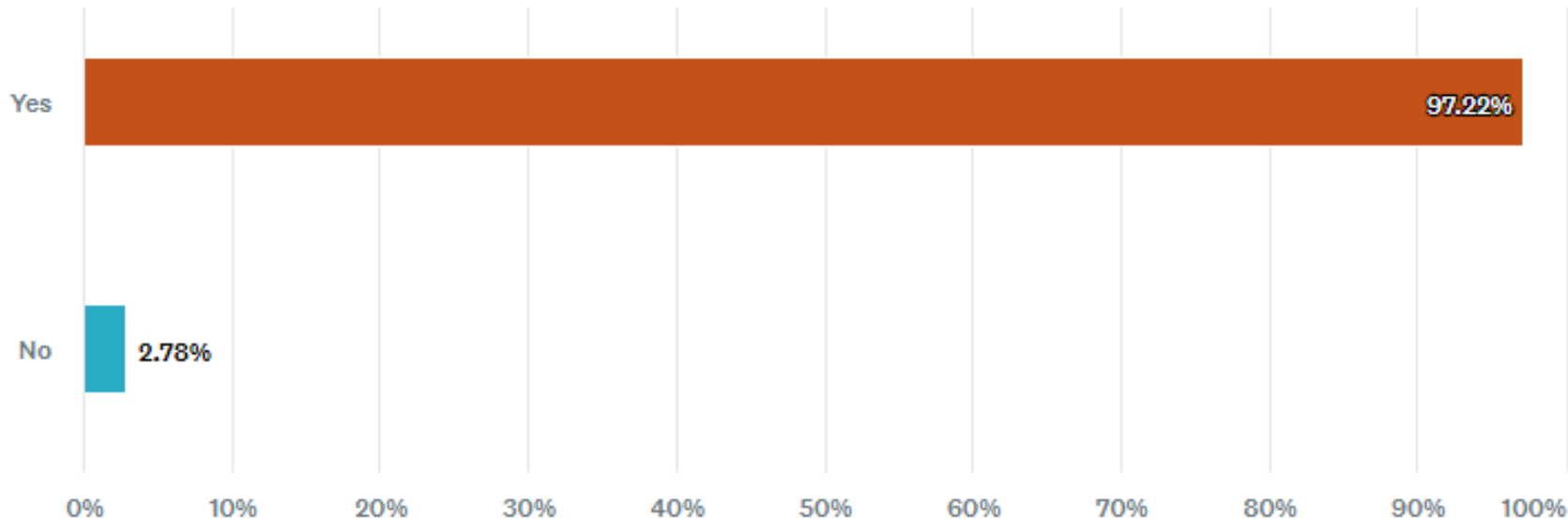


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Q10: Have any of your suppliers already notified you that they will be introducing price increases?



Q10: Comments about your suppliers and the topic of price increases.

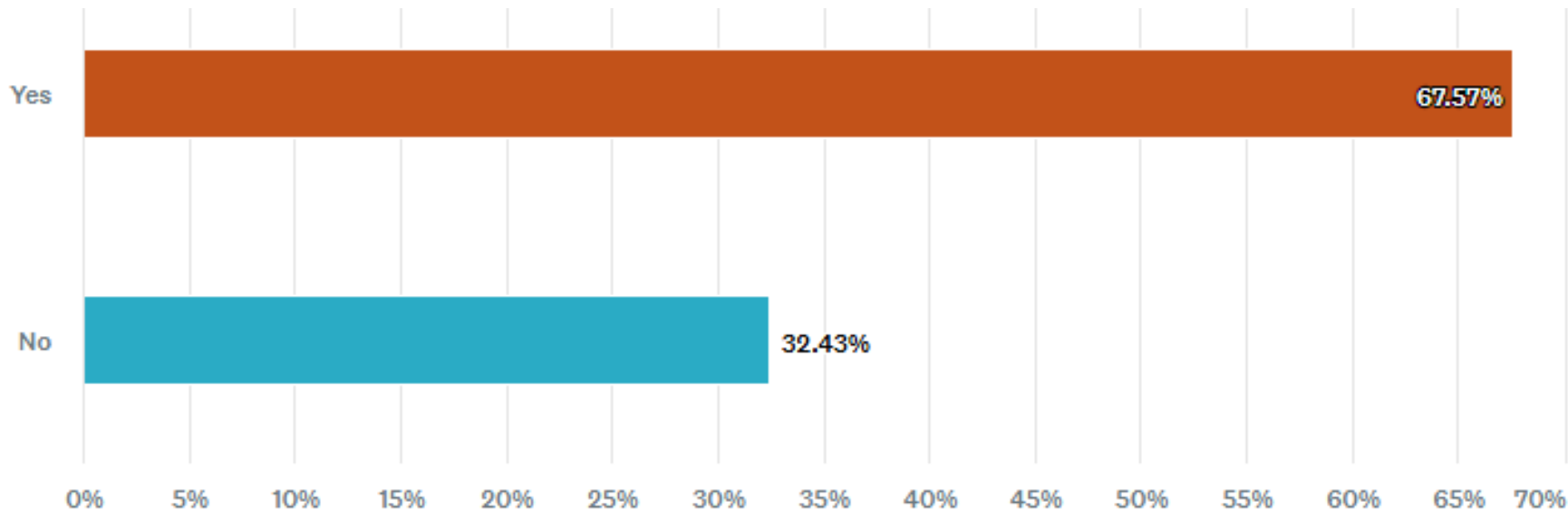
- Silver and copper is constantly being reviewed
- There was already discussion about price increases and the ME conflict just added to the pressure
- Expect the costs to continue to soar as the impact of oil price and supply challenges on China continue to grow.
- Typically 3-5% currently
- Plastics / Price increases of 10%+ in plastics
- Nearly every supplier, or our own factories, have price increases. We are shouldering some of these, our price increase to the Wholesale market does not cover them all
- It is mostly transportation suppliers, but products containing **tungsten** and shortly other metals as well, are seeing increases (whether the latter is due to Middle East I'm not sure)
- Price increases vary based on the amount of copper or plastic they contain.
- We are being advised of increases in excess of 20%
- Copper pricing volatile, 44% increase since the start of the year

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Q11: Do you have a contingency plan in place for dealing with the volatility of costs which may result from the ongoing Middle East crisis?





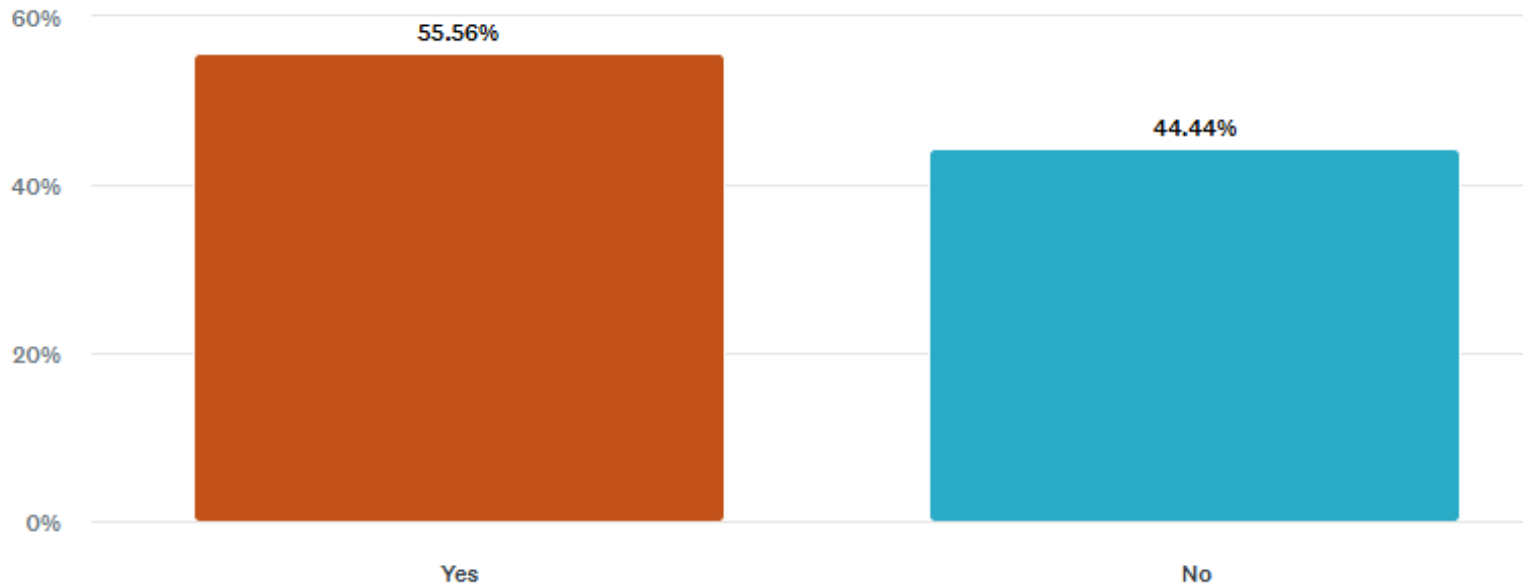
Q11: If applicable, what does that contingency planning involve?

- Increasing our sales prices accordingly / Putting up prices
- Re-routing supply
- Purchasing 6 months stock in March at original prices
- Introduced solar panels to deal with local energy costs - other than that may have to consider further price rises
- Some contingency is safety stock levels
- Alternative supply chain options
- Stock levels, hedged supply pricing
- Alternative sourcing where appropriate.
- Price increase deferments, which is only delaying the inevitable.
- Longer lead times, drawing stocks from parent company
- We generally hold around 6 months of raw materials, so impact may be avoided IF there is a swift resolution, confidence not high on that one
- How can you plan for something like this!

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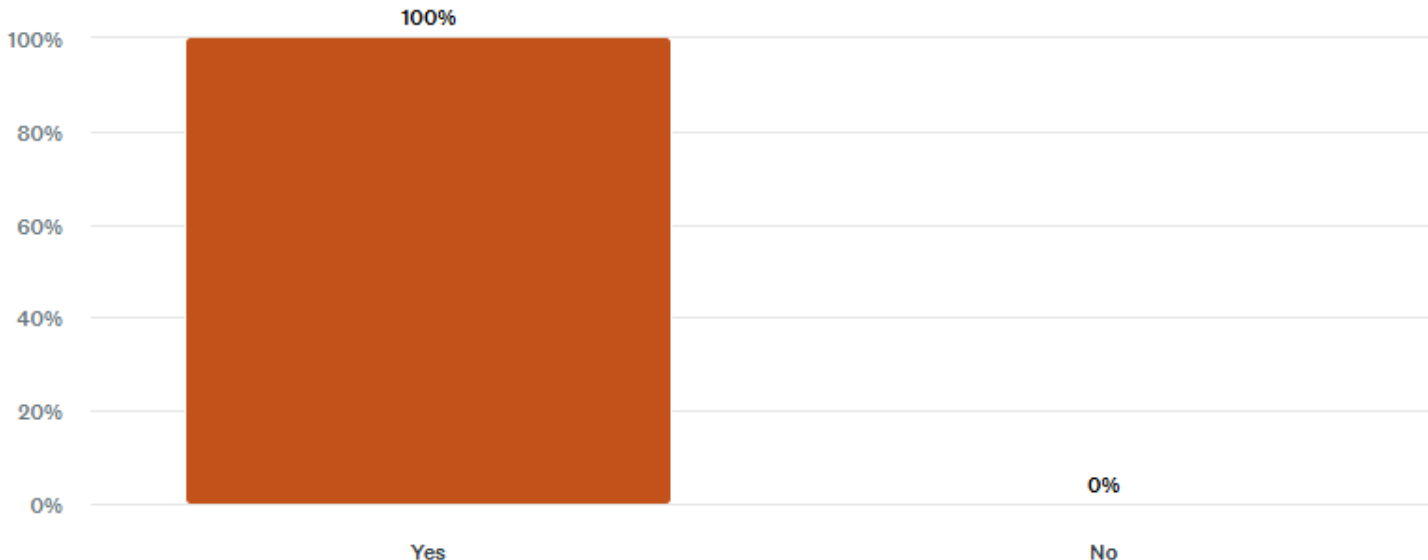


Q12: As at end March 2026, had you already implemented a price increase this year?



Q13: To those that had not implemented a price increase as at end March 2026 we asked...

Are you planning a price increase (or more than one) in 2026?

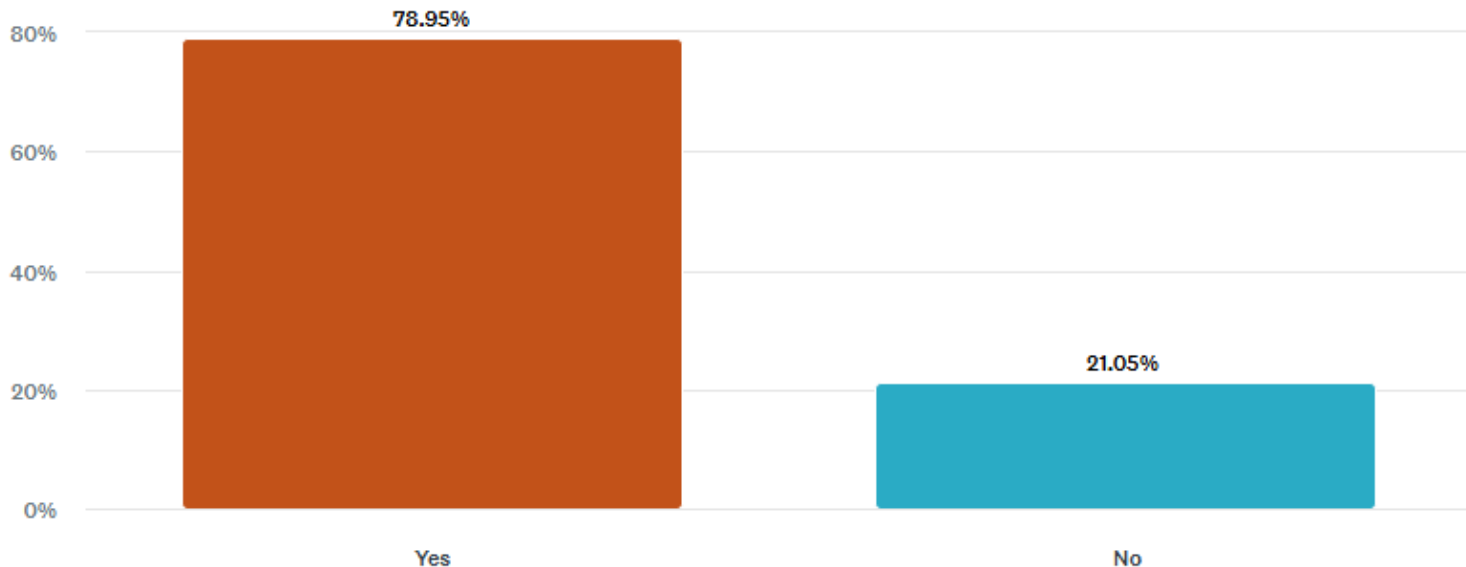


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Q14: To those answering YES, as at end March 2026 we had already implemented a price increase this year, we asked...

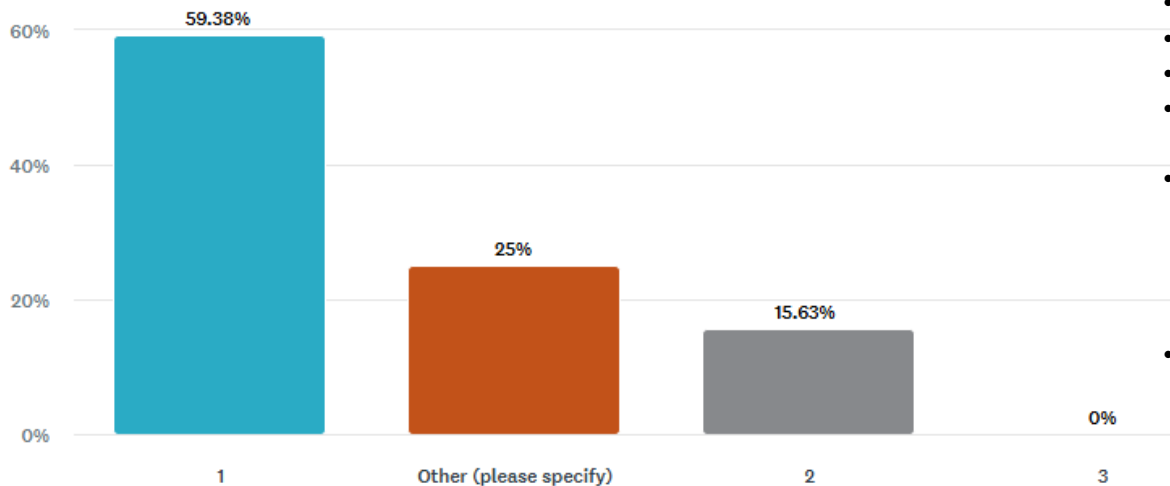
Are you planning a further price increase (or more than one) in 2026?



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Q15: From 1 April 2026, how many price increases do you anticipate your business will introduce in the remainder of the year?

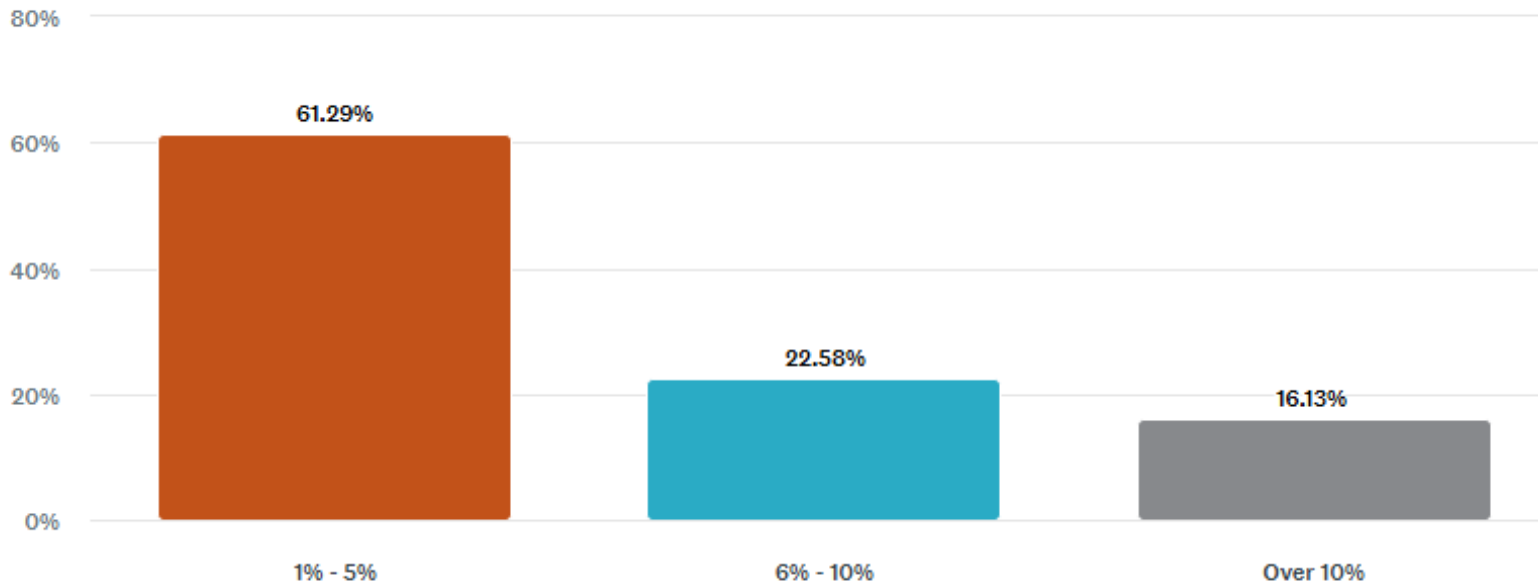


Those choosing "Other" said:

- Will depend on the developing situation
- One in November if we can wait
- very fluid
- Unclear yet. Depends on many factors including competitors / market.
- The reality is we do not know. We are planning for a July 1st increase and are monitoring costs to decide what this increase should be. The question below is range dependent.
- This is a global economic and geopolitical issue, it is evolving and as it does, this will impact costs and market conditions. So price increase assumptions cannot be made and will be reactive based its impact on global supply, demand and energy availability.
- It is very difficult to comment due to the volatility of the market
- Multiple

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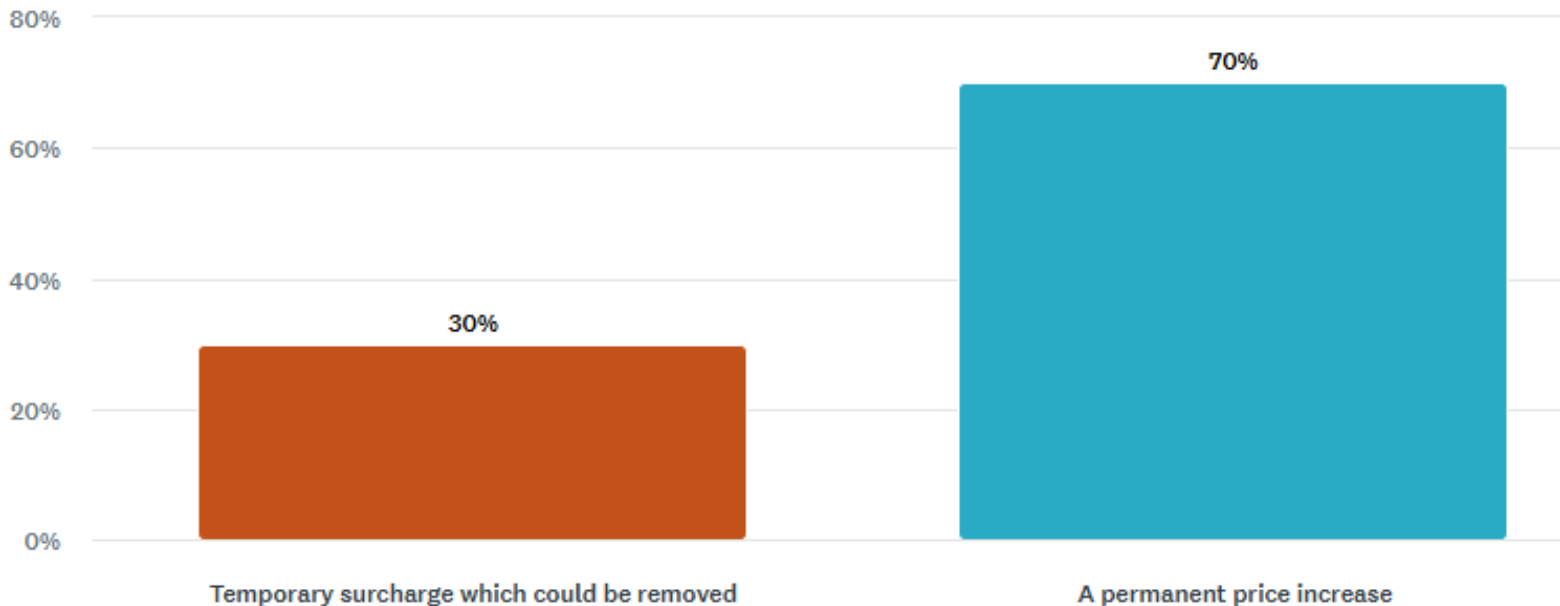
Q16: What level of price increase do you anticipate implementing for your products in the next cycle?



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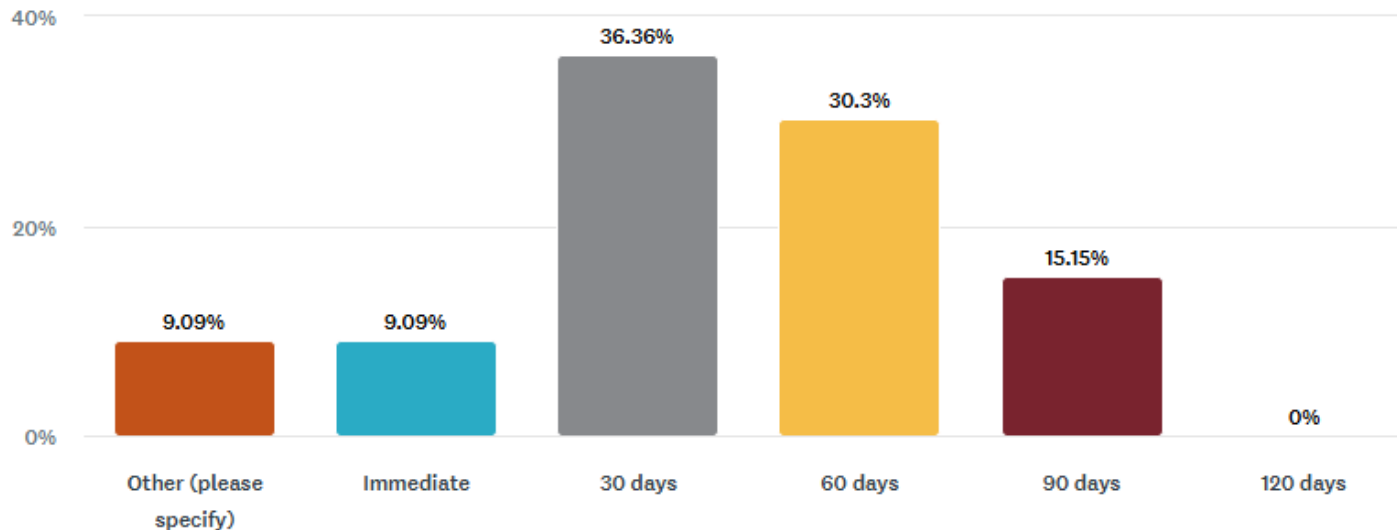
Q17: Will the increase be a temporary surcharge which could be removed, or a permanent price increase?



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Q18: Will the increase be a temporary surcharge which could be removed, or a permanent price increase?



“Some customers require longer notice. We have warned these customers of an impending increase, this actually happened prior to the conflict due to copper, plastic and component cost increases, we are now monitoring if the conflict will leave long term product cost increases.”

“Based on changes in stock costs”

Q19: As the Middle East crisis unfolds, where do you see the biggest risk for your business? 1 of 2



Rising Costs & Pricing Pressure

- Cost of product / goods
- Cost of materials
- Ongoing price increases
- Increased material, manufacturing, and distribution costs as well as slower production causing bottle neck delays to distribution.
- Materials Cost & Availability
- Price rises
- Cost of energy, transport costs
- Manufacturing and shipping costs as well as market uncertainty
- Increasing costs of transportation and raw material
- Rising costs & margin pressures
- Oil prices and raw materials
- Inflation and costs increasing, quickly

Supply Chain & Availability Issues

- Supply of product
- Extended delivery - having to increase UK stock holding
- Shipping. We have secured the products at pre conflict prices so we just need to get it to the UK
- Continuity of supply in the medium long term at a cost/price that the market will accept
- Supply of key materials
- Raw material deliveries
- Fuel Prices and Freight disruption plus Currency.
- continued rising costs along with delay in RM
- Raw material supply disruption and volatile pricing

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Q19: As the Middle East crisis unfolds, where do you see the biggest risk for your business? 2 of 2

Market Demand & Customer Behaviour

- Lack of public confidence
- Consumer confidence = less spending on RMI and potential interest rate disruption.
- Demand decrease amid inflation and uncertainty
- Production increases outstripping what the market is prepared to pay for our goods leading to customers finding cheaper alternatives (which may be of a lower quality).
- Confidence
- Market inertia, inflation = Loss of business investment and confidence spending power

Economic Conditions

- Impact on economy
- Further negativity for growth in the UK market

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Q20: As the Middle East crisis unfolds... how will this impact your wholesaler customers?



Price Increases & Cost Pressures

- Rising costs & margin pressures
- Prices will increase / Potential price increases (multiple responses)
- Some of the increases will need to be passed on
- No further planned increases at this time but this is monitored on weekly basis due to rising material costs.
- Will have to accept price increases and pass them on to their customer base - distributors might hold higher stocks in anticipation of further price increases and possible issues
- Costs will have to be passed on but we are building increased stock to hopefully negate availability issues.
- Will mean price increase but if they pass on will result in a positive impact on revenues.
- Supply will continue, Pricing will be come more of an issue, especially with long term projects
- Increase in prices, greater scrutiny of relationships that are adding value

Stock Availability & Supply Chain Issues

- Erratic supply of goods and price uncertainty
- Stocking of product
- Possible stock shortages waiting for stock to arrive
- Due to the recent economic state we have seen a general reduction in stock held at wholesalers.
- Reluctant to commit to stocking

Demand & Business Activity Decline

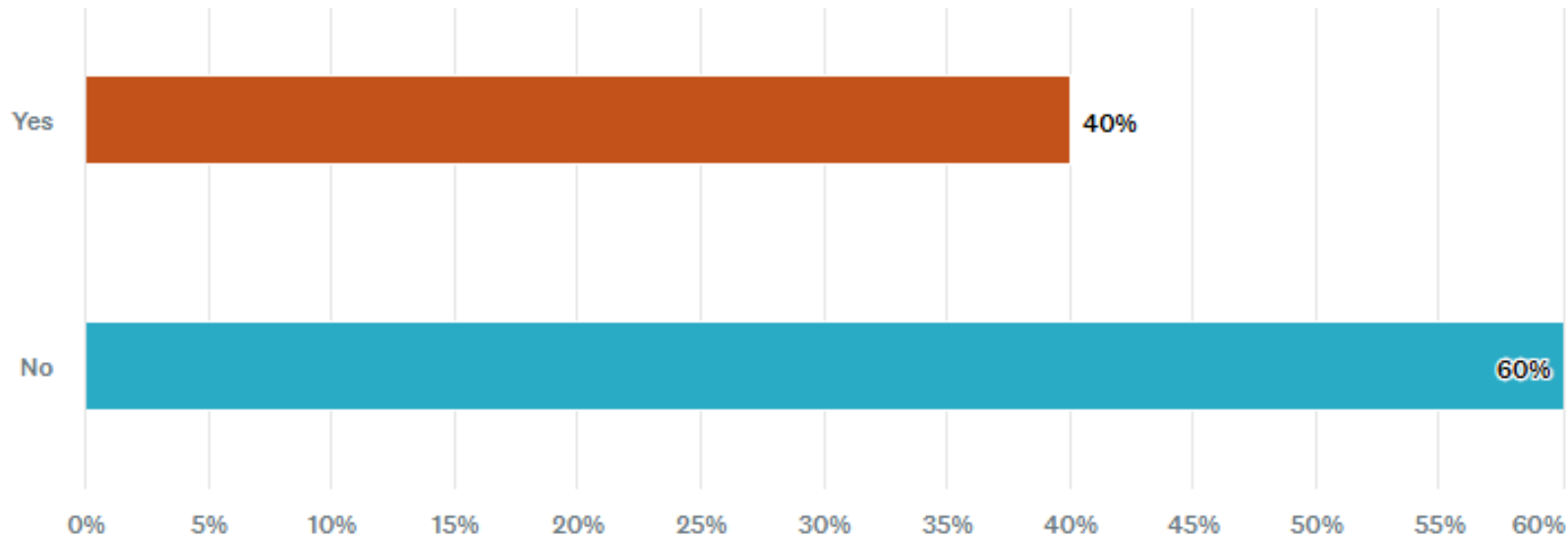
- Contractor demand and bad deb risk
- Less contract and domestic business
- Less business
- No enquiries

Project Delays and Lead times

- Increased lead times on projects

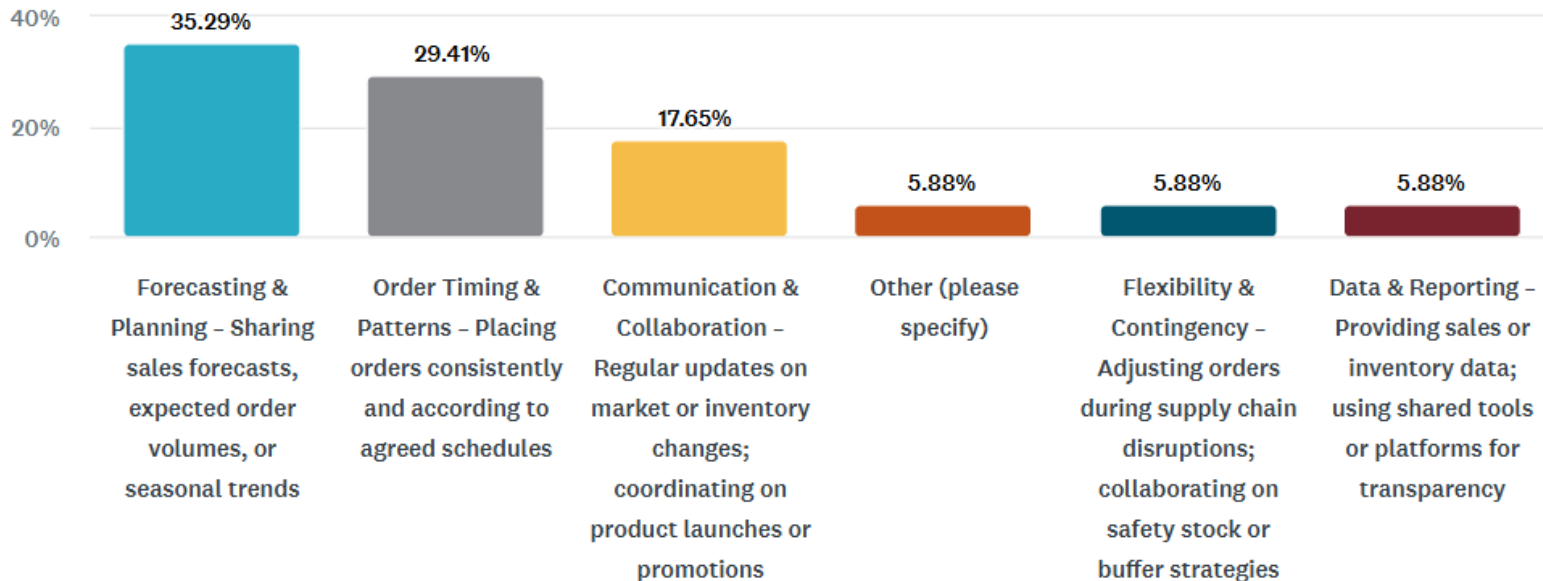
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Q21: Since the Middle East crisis began, are you receiving more enquiries from your wholesaler customers regarding product supply and cost?




Q22: What actions, if any, could your wholesaler customers take to help you plan demand more effectively? Please select all that apply.

"All of them"



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Q22: What actions, if any, could your wholesaler customers take to help you plan demand more effectively? Please select all that apply.

“Wholesalers advising their customers to plan/order in advance as last minute orders are more likely to be the ones that will be harder to fulfil. Plan - Communicate – Collaborate”

“Without seeming critical, with a few exceptions our customer base seems very reactive to contractor orders not general stock (this is a general statement there are exceptions).”

Q23: Given the fluid situation, what additional steps are you taking to manage expectations within your wholesaler customer base?



Customer Communication & Transparency

- Reminding them of our current availability and service, plus the fact we have not increased our price as yet
- We have notified of a potential increase, but are waiting to see if we have to implement. At the moment we are absorbing increased costs
- Regular dialogue with key partners / Better conversations
- Official letters, updates on our situation
- We are communicating through our extensive external sales team
- Where possible we are warning customers that prices will rise
- Soft Messaging
- Given this is global issue, one would hope they are well versed on the wider impact of the conflict, to both our industry but the wider global economic and political instability, threat and impact on global inflation.
- Keeping them informed
- Transparent conversations
- Regular dialogue, assurance of current manufactured stock levels with transparency in any factors changing the daily situation

Data & Monitoring

- Regular data flows

Pricing Strategy & Cost Management

- Minimising any increases applied at production

Supply Chain & Sourcing Adjustments

- Sourcing from alternative locations
- Increase in supply
- Bought additional stock lines and secured better shipping services

Inventory & Stock Management

- Just managing our stock levels
- Increasing stock levels

Order & Demand Management

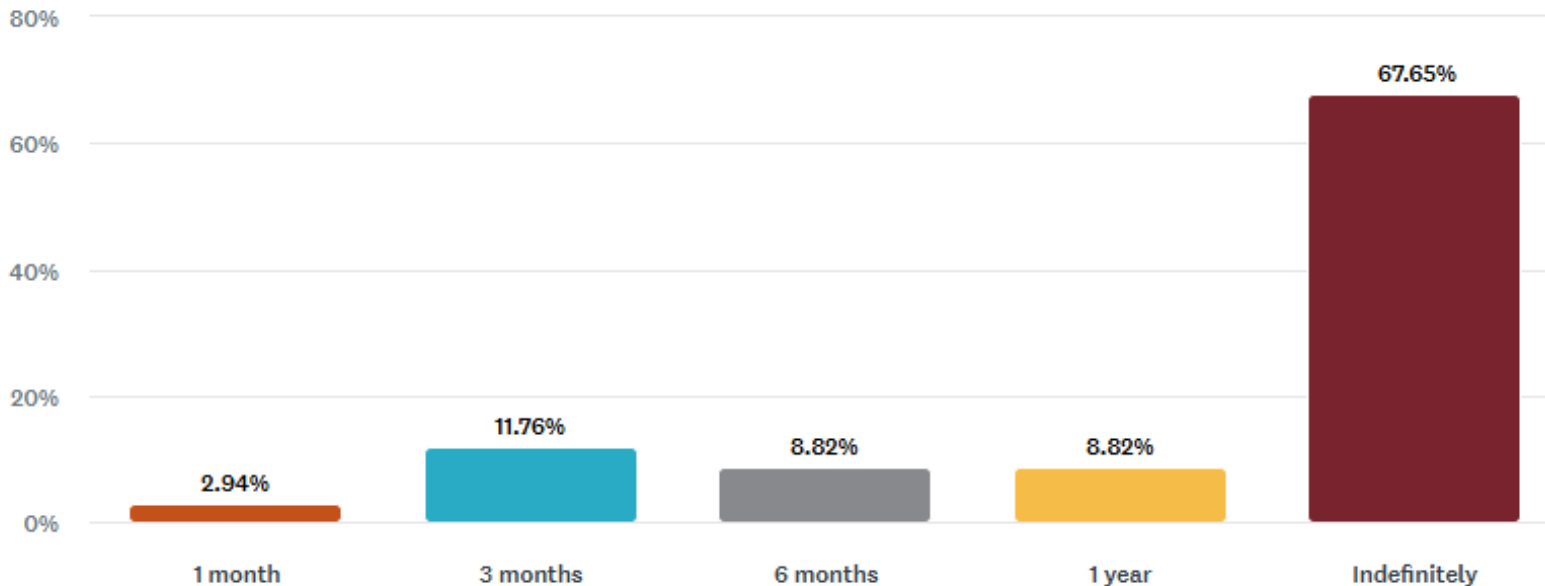
- Asking them to place call off orders
- Ensuring we can sustain the supply for our 'supporters' and whilst being more selective on one-off enquiries.

Product Strategy & Substitution

- Offering to substitute better products where applicable

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Q24: If the conflict were to continue to the end of 2026, how long would you be able to assure continuity of supply?



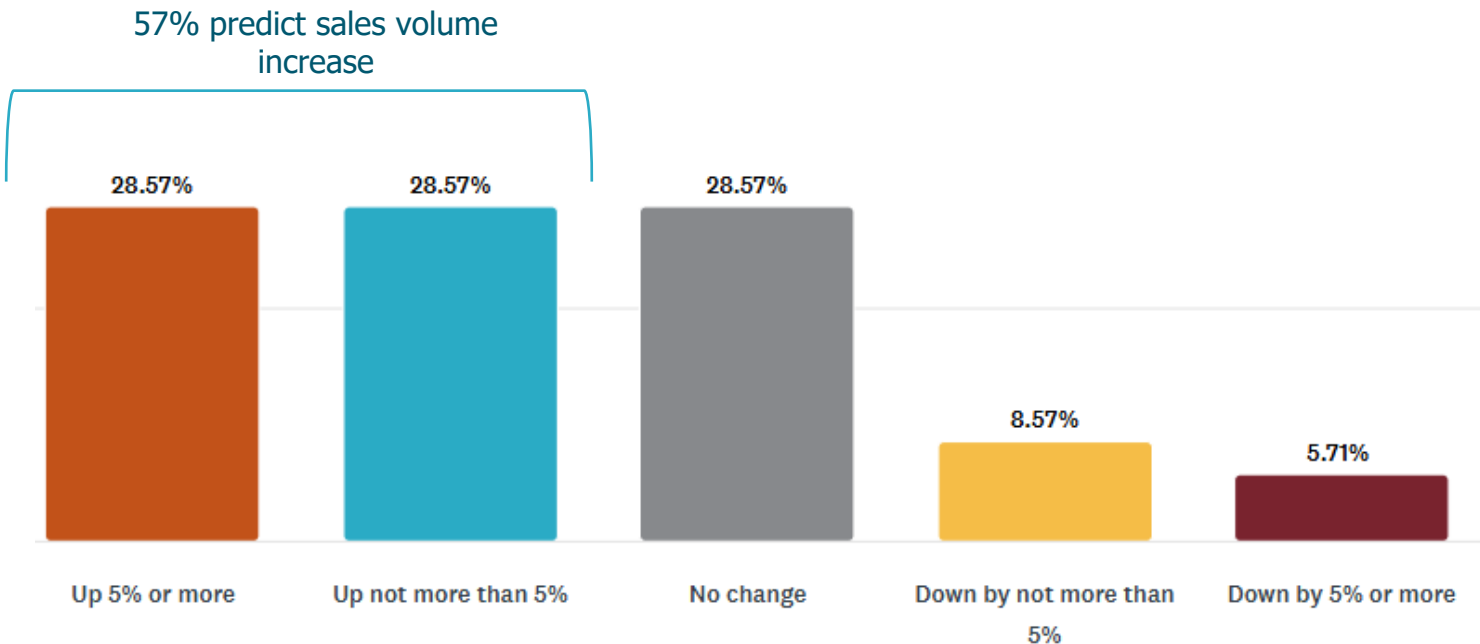
Q24: Comments on product supply.

- We have secured stock until Q1 2027
- Product manufacture is unlikely to be affected the logistical problem grows ie Getting to and around UK
- Generally supply unaffected, just pricing
- I don't see our product availability being cut to zero at all, though there might be some interruption to supply due to longer transit times.
- We currently hold around 5 months stock based on individual product forecast, with supply which is already in the water we could supply 6-8 months if production stopped immediately (this comment is a based on current forecasts).
- The majority of our product is from Mainland Europe
- Depends on the war and shortages that may occur for components over this period
- Unknown

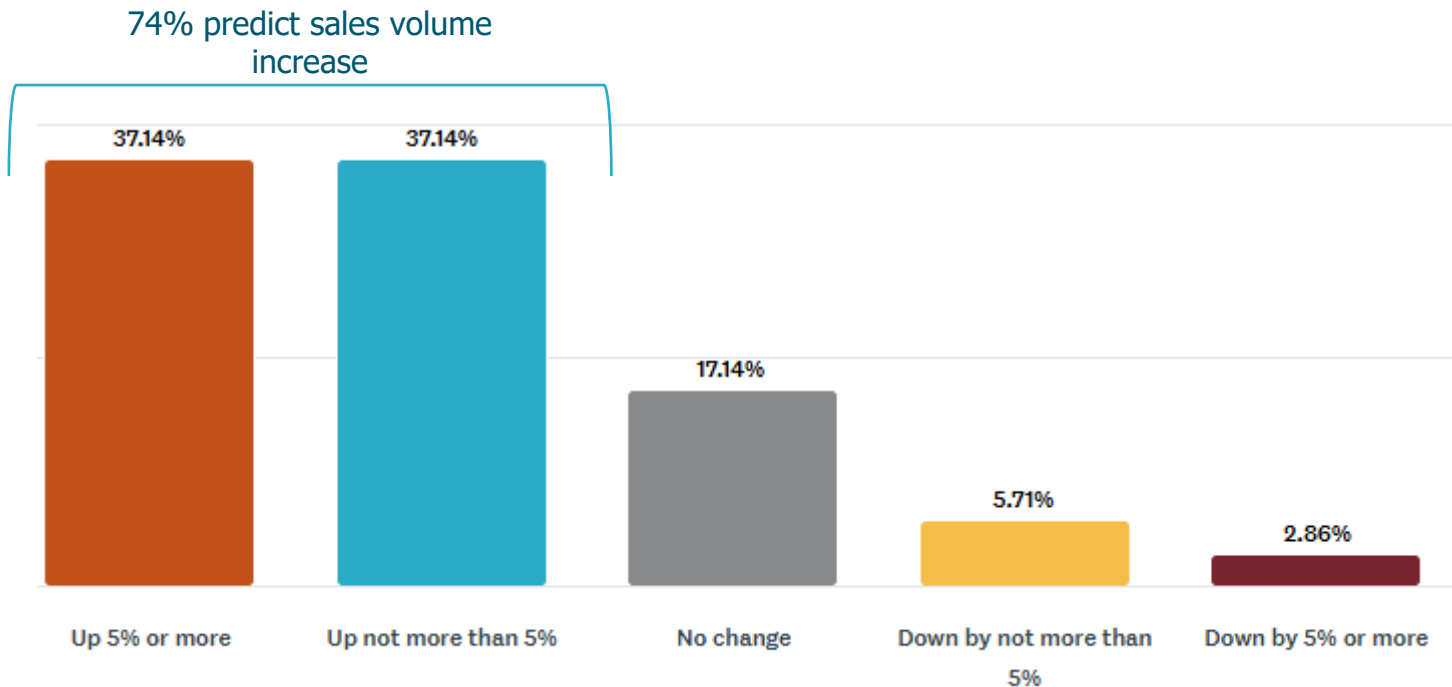
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Q25: How do you anticipate sales volumes (like for like sales) will change during Q2 2026?



Q26: How to you anticipate sales volumes (like for like sales) will change during 2026?



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