



TPC Semiconductor Market Survey

June 20, 2022

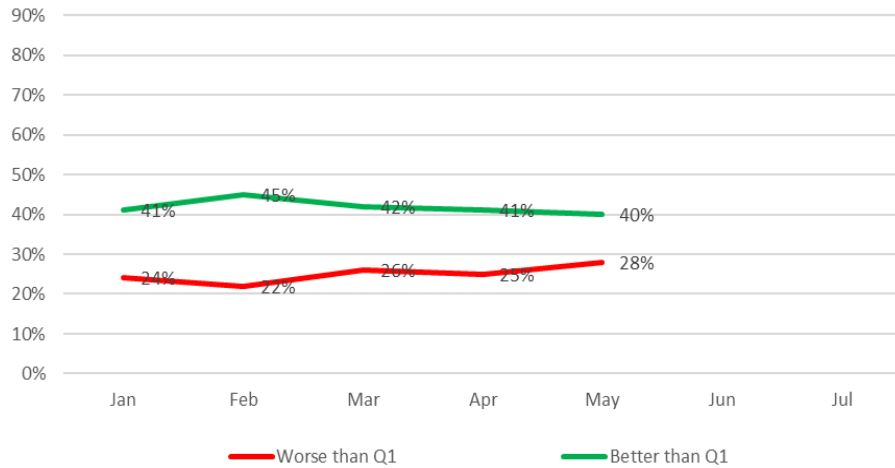
TPC May/June 2022 Survey Summary

*Survey Date: 6/3-10 Respondents: ~9,500 Location: Worldwide (~80% Asia) Who: Active Electronics Industry Professionals
Response Composition (multiple choices): Industrial 40%, Auto 21%, Comm 20%, Computing 18%, Mobile 31%, Data Ctr 20%, Other 15%*

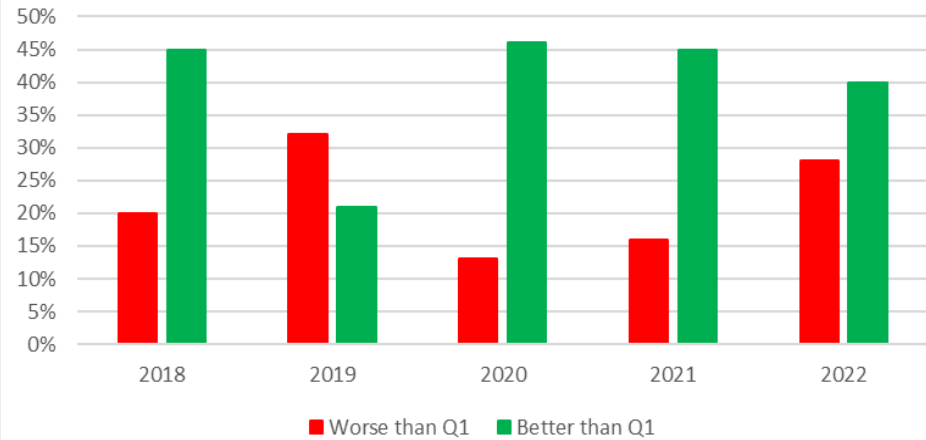
- We recently completed our monthly survey (~9,500 respondents) where we continue to see weakening across both C2Q22's and C3Q22's outlook for growth, seasonality, and bookings.
- Our C2Q22 outlook shows a return to more normal pre-COVID expectations, with seasonality roughly in line with CY19. However, the bookings outlook for C2Q22 is far weaker vs. previous years.
- Our C3Q22 outlook also shows a return to more normal pre-COVID seasonality, but again with the bookings outlook for C3Q22 far weaker.
- Backlog cancellation expectations (slide 7) continues to show negative trends.
- Key product inventory and availability (slide 8) showed improvement in availability across all key products and is now at or slightly above normal levels.
- Q/Q inventory growth (slide 9) continues with some supply chains starting to request for push outs. This is led by consumer, but we are also starting to see some automotive supply chains request order push outs.

Q/Q Demand Growth Outlook

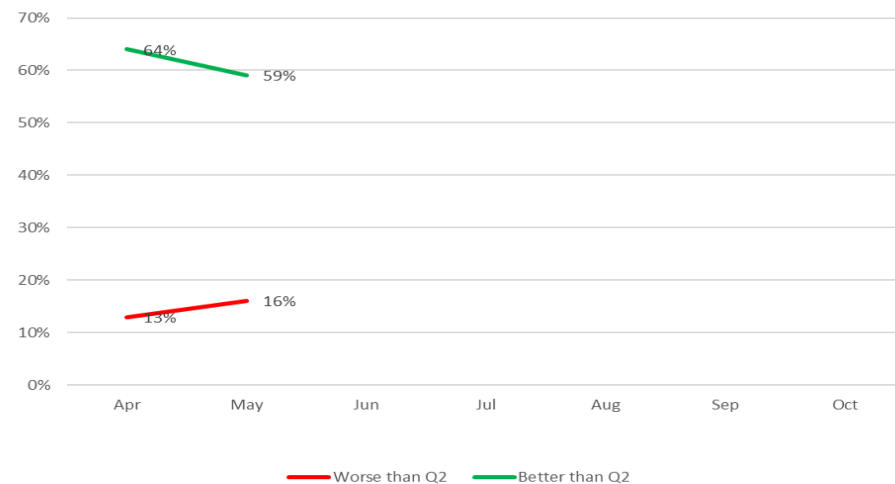
C2Q22 Growth Expectations



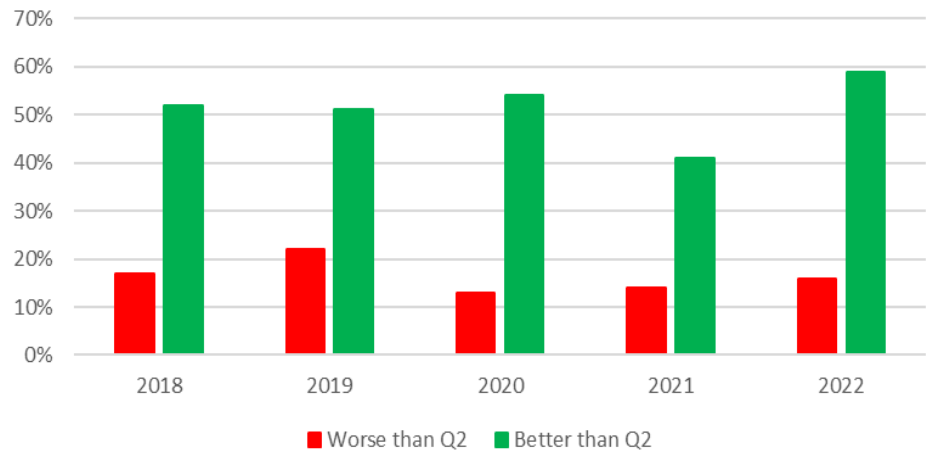
C2Q Growth Expectations vs. C1Q



C3Q22 Growth Expectations

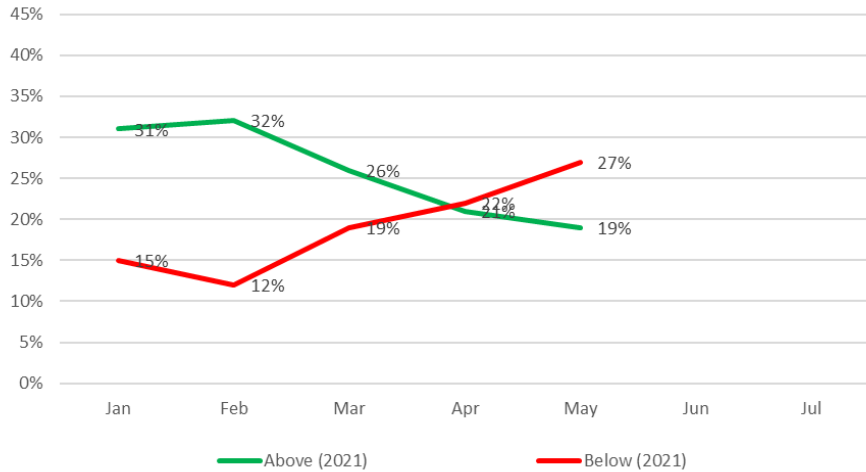


C3Q Growth Expectations vs. C2Q

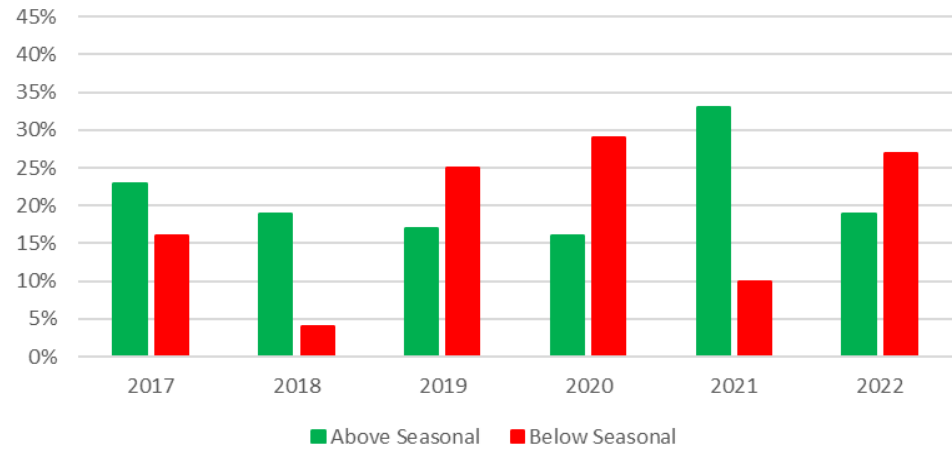


Q/Q Seasonality Expectations

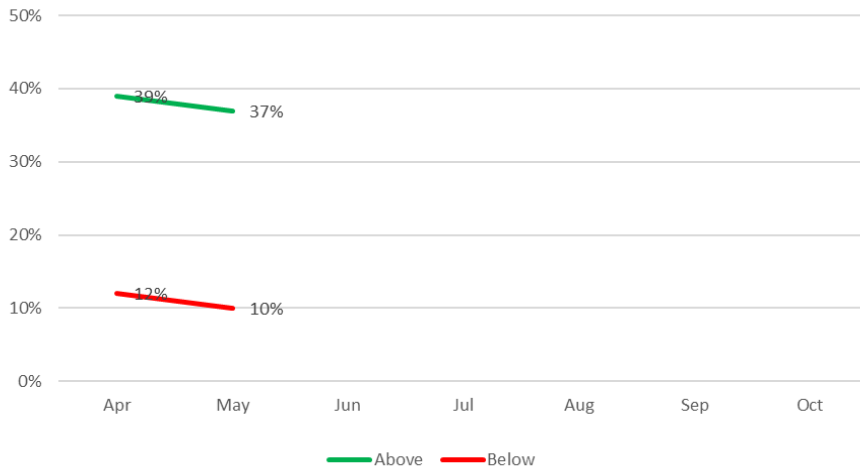
C2Q22 Seasonality Expectations



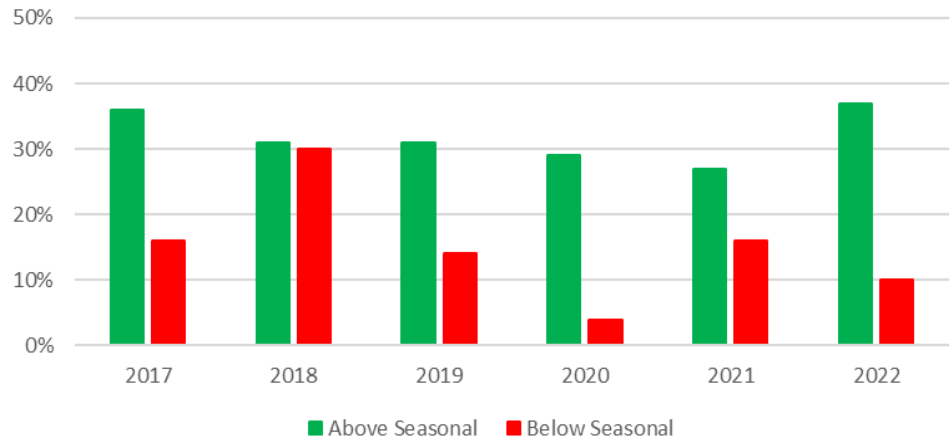
C2Q Seasonality Expectations



3Q22 Seasonality Expectations

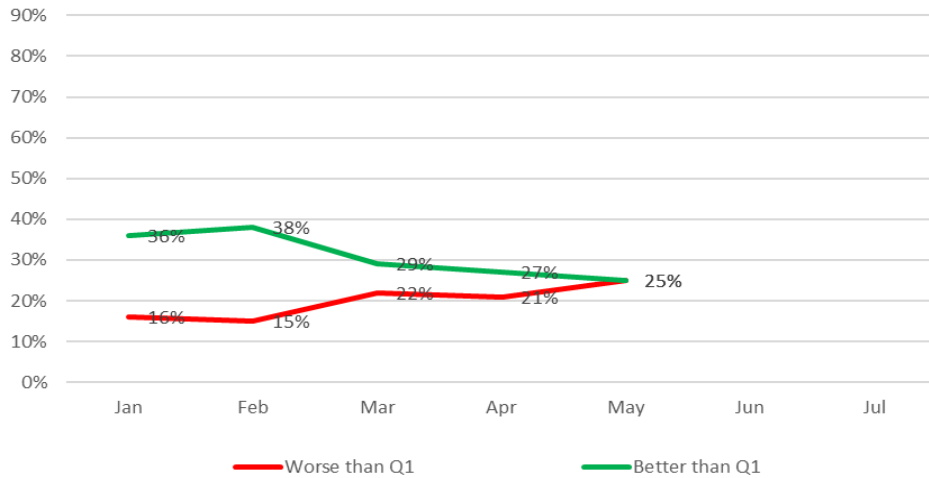


C3Q Seasonality Expectations

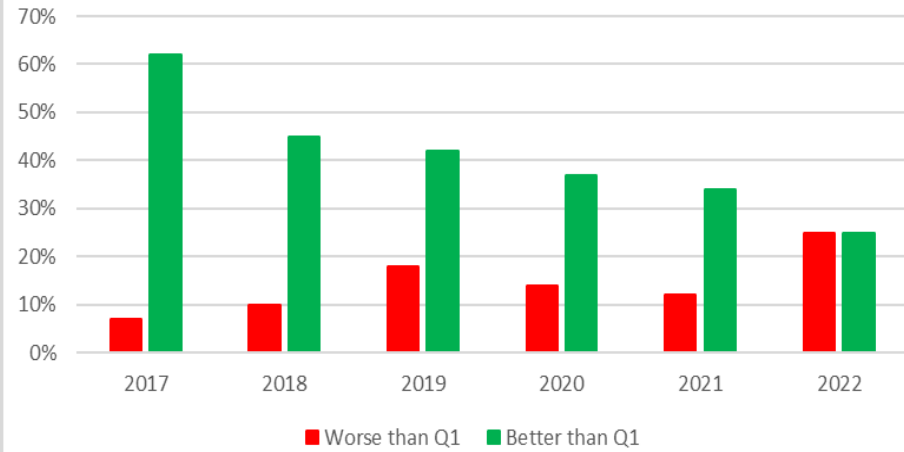


Q/Q Bookings Growth Expectations

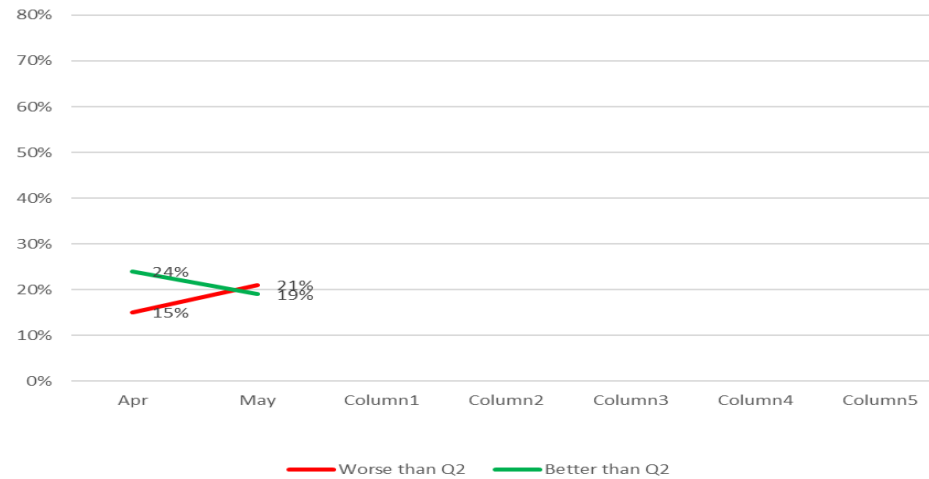
C2Q22 Bookings Expectations



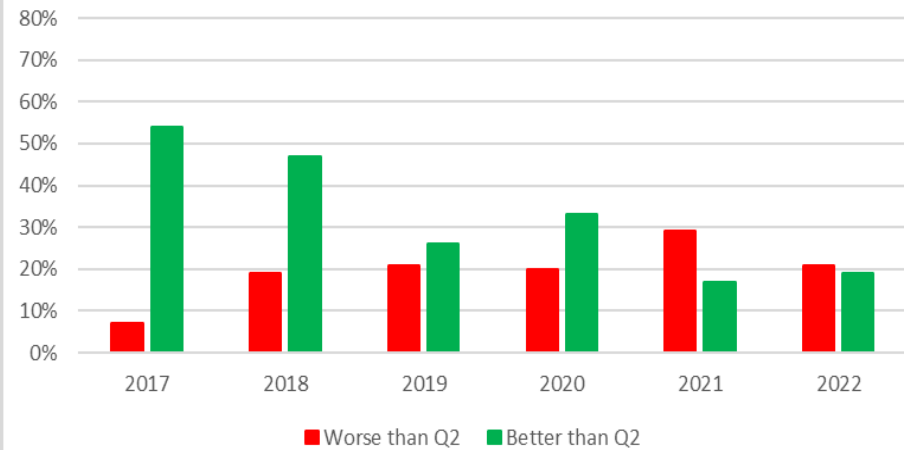
C2Q Bookings Expectations



C3Q22 Bookings Expectations

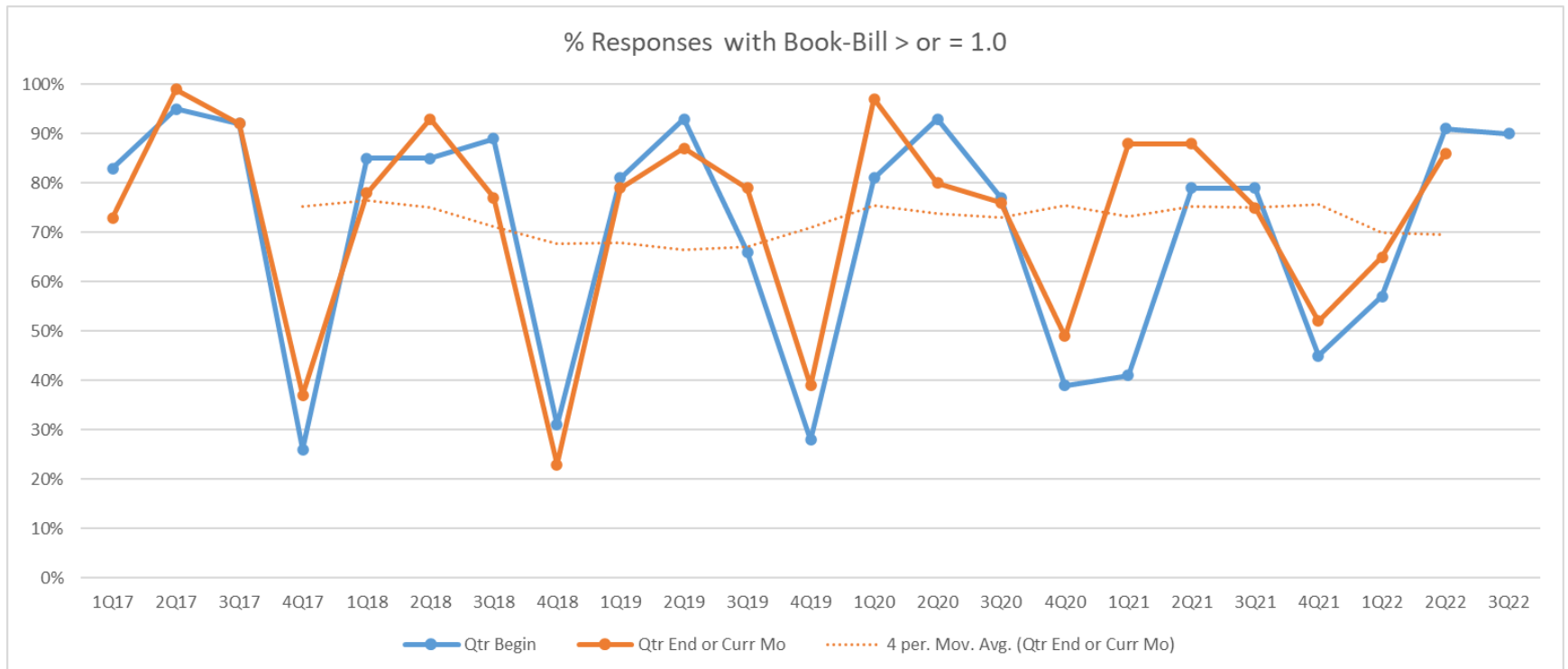


C3Q Bookings Expectations



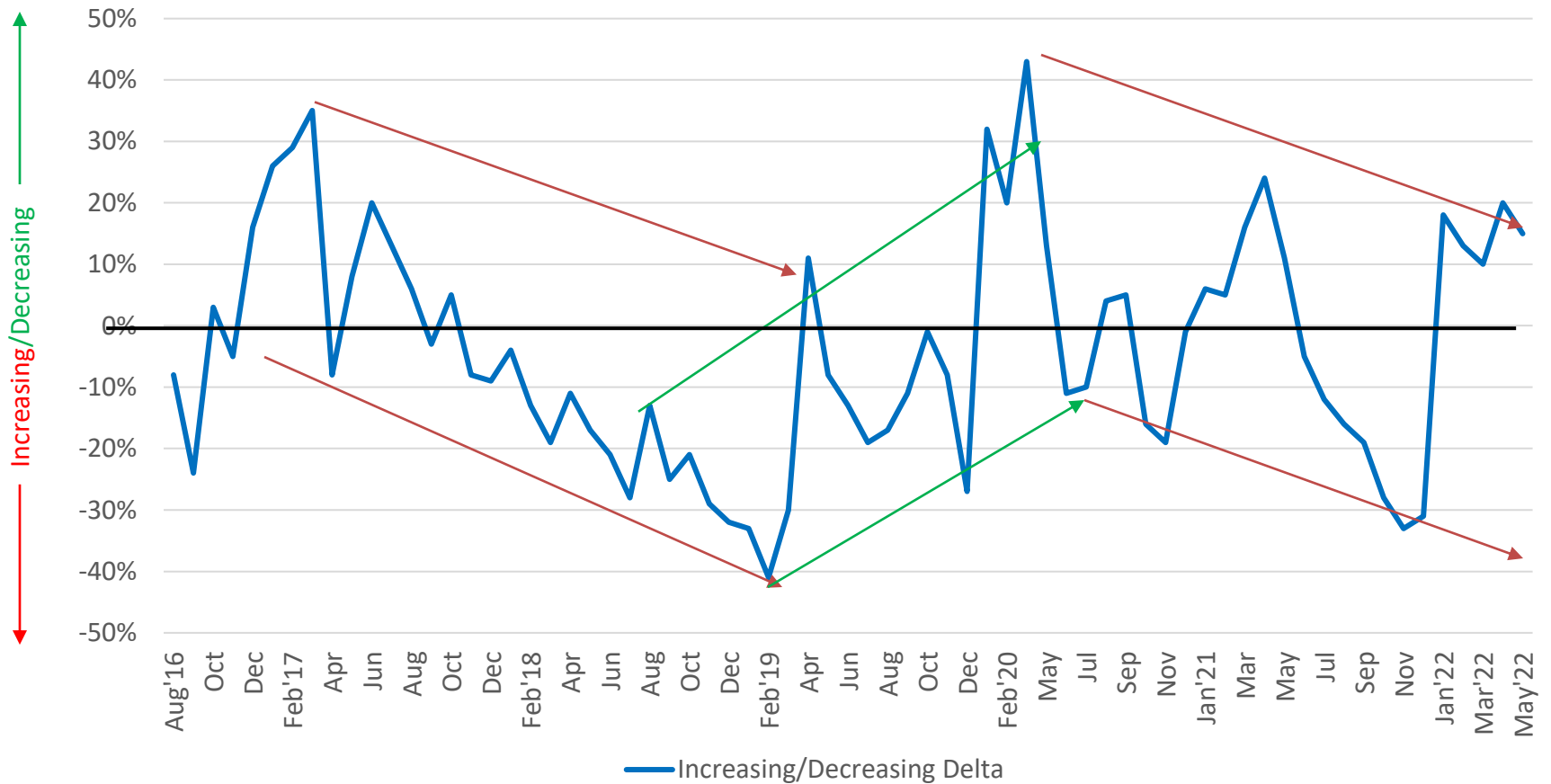
Book to Bill History & Trends

(Calendar quarters)



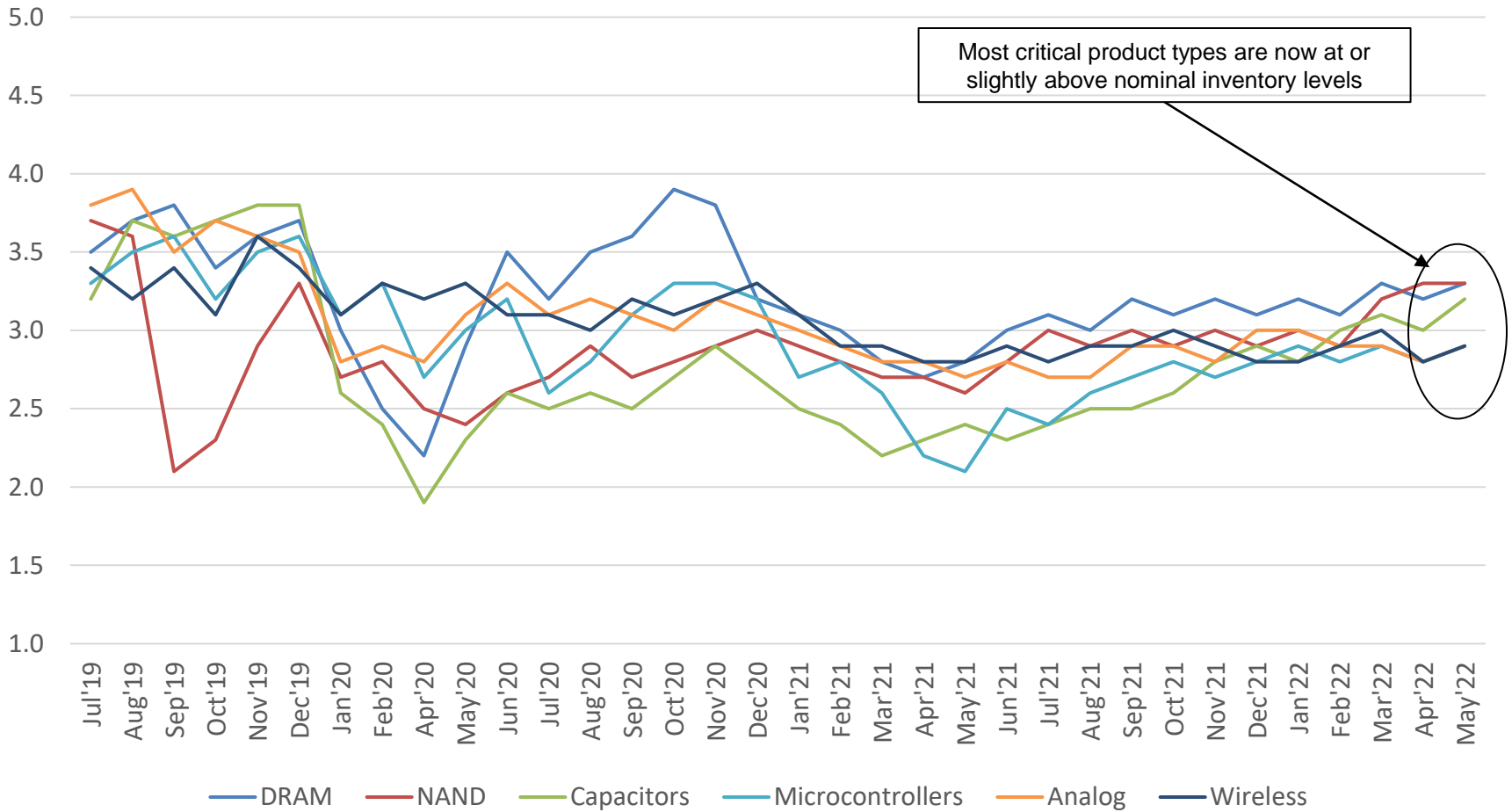
Backlog Order Push Outs/Cancellations vs. 30 Days Ago

(Delta between increasing and decreasing cancellations – Higher % is more positive)



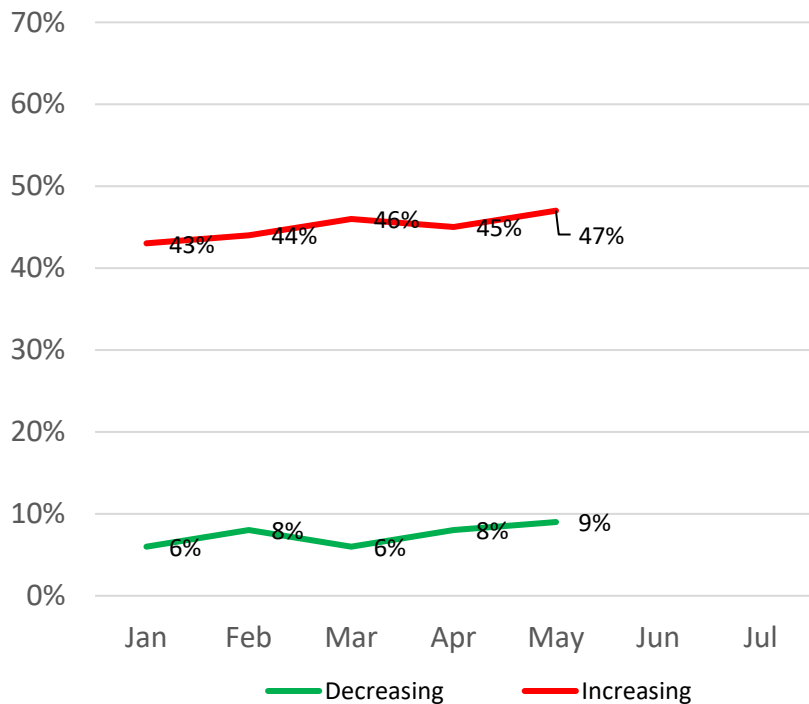
Inventory Status

(Using a scale of 1 to 5 with 1 being extremely low inventory, 3 being the normal amount, and 5 being extremely high; how do you view inventory levels for the following products?)

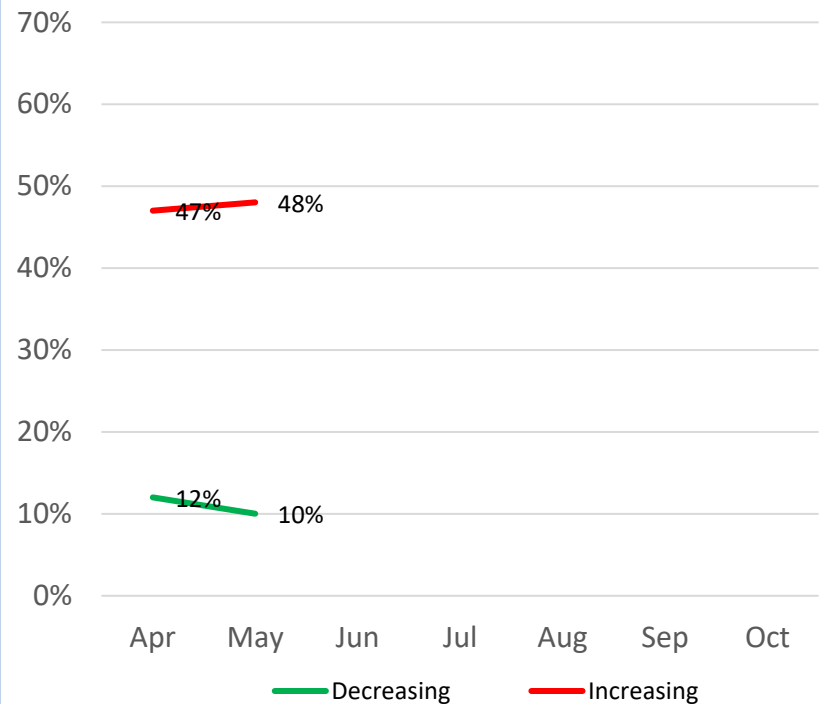


Q/Q Inventory Growth

C2Q22 Inventories vs. C1Q22

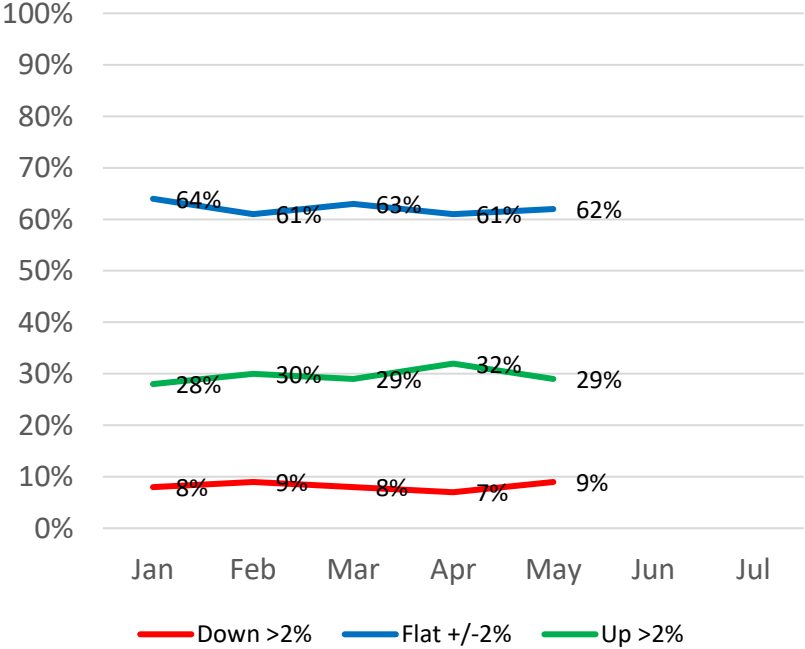


C3Q22 Inventories vs. C2Q22

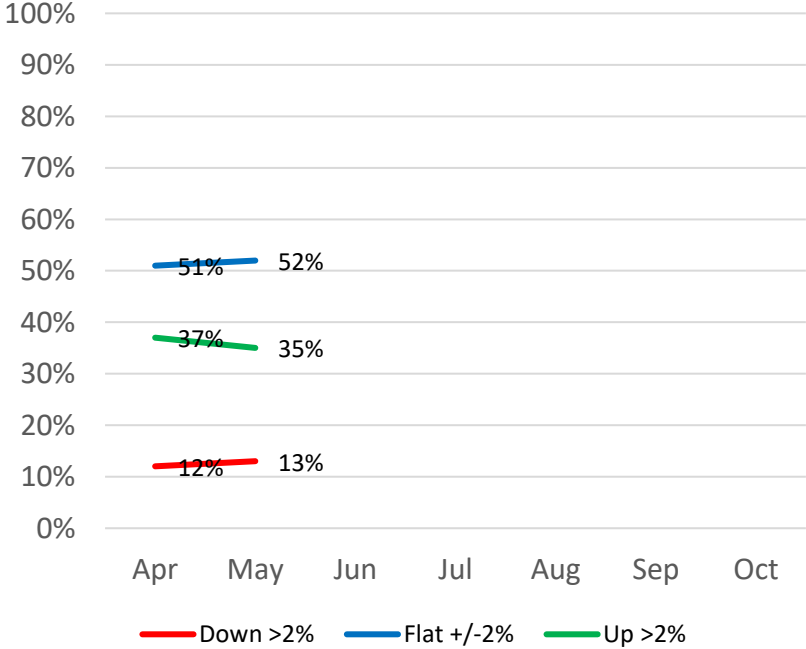


Q/Q Pricing Trends

C2Q22 Pricing vs. C1Q22



C3Q22 Pricing vs. C2Q22



Vertical Outlook

