

Coronavirus Survey – Update 1

Results of Manufacturer & Distributor Survey Ended Feb 21, 2020

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Introduction

As the impact of the Coronavirus continues to grow in China and around the world there is a need to provide visibility on how this crisis is impacting the electronics components industry and the supply chain. (See Figure 1) In order to provide important visibility, ECIA conducted an initial survey of member manufacturing and distributor companies to gain an understanding of this fluid situation. ECIA published the results of the survey which ended February 7, 2020 in a report released on February 11th.

The results in the first report revealed that most companies were still struggling to gain visibility on their supply chains and did not know the expected impact from this crisis. As a result, ECIA has conducted a second survey which concluded February 21, 2020. The results for this second survey are presented in this follow-up report.

The results of the second survey reveal a much stronger level of visibility on the supply chain in the Electro-Mechanical and Passive component segments. The good news is that in these segments most respondents expect the impact to be minimal to moderate. However, as a point of concern, most expect the crisis to add more than 2 weeks lead time to component supply in these segments. Visibility in the semiconductor segment continues to be poor. For those providing some guidance, it is expected that the semiconductor segment will not be impacted.

The data presented here is based on the aggregated results of the survey. It was necessary to combine the results from the distributor and manufacturer surveys to capture enough data to provide valid results.

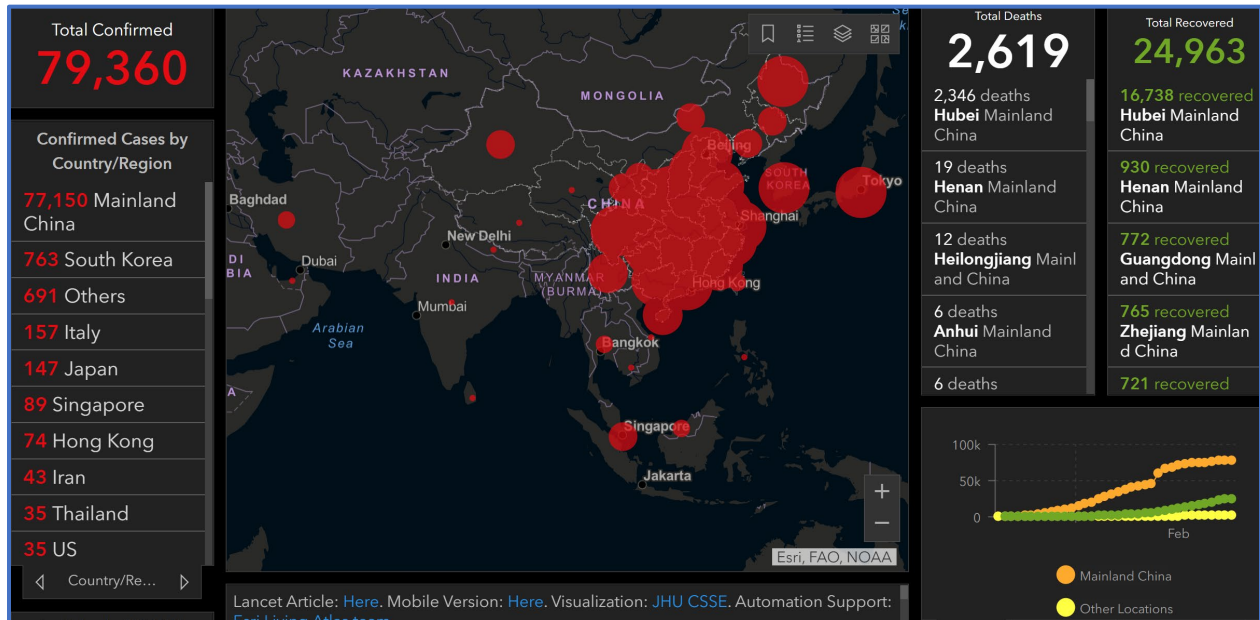
Detailed data by component type is provided for the major categories of:

- Electro-Mechanical
- Passives
- Semiconductors

A top-level average of each of these categories is provided in the overview at the beginning of the report.

Figure 1 – Wuhan Coronavirus (2019-nCoV) Global Cases

The following link provides access to this application that provides live updates on the spread of the Coronavirus - [“Wuhan Coronavirus \(2019-nCoV\) Global Cases”](#)



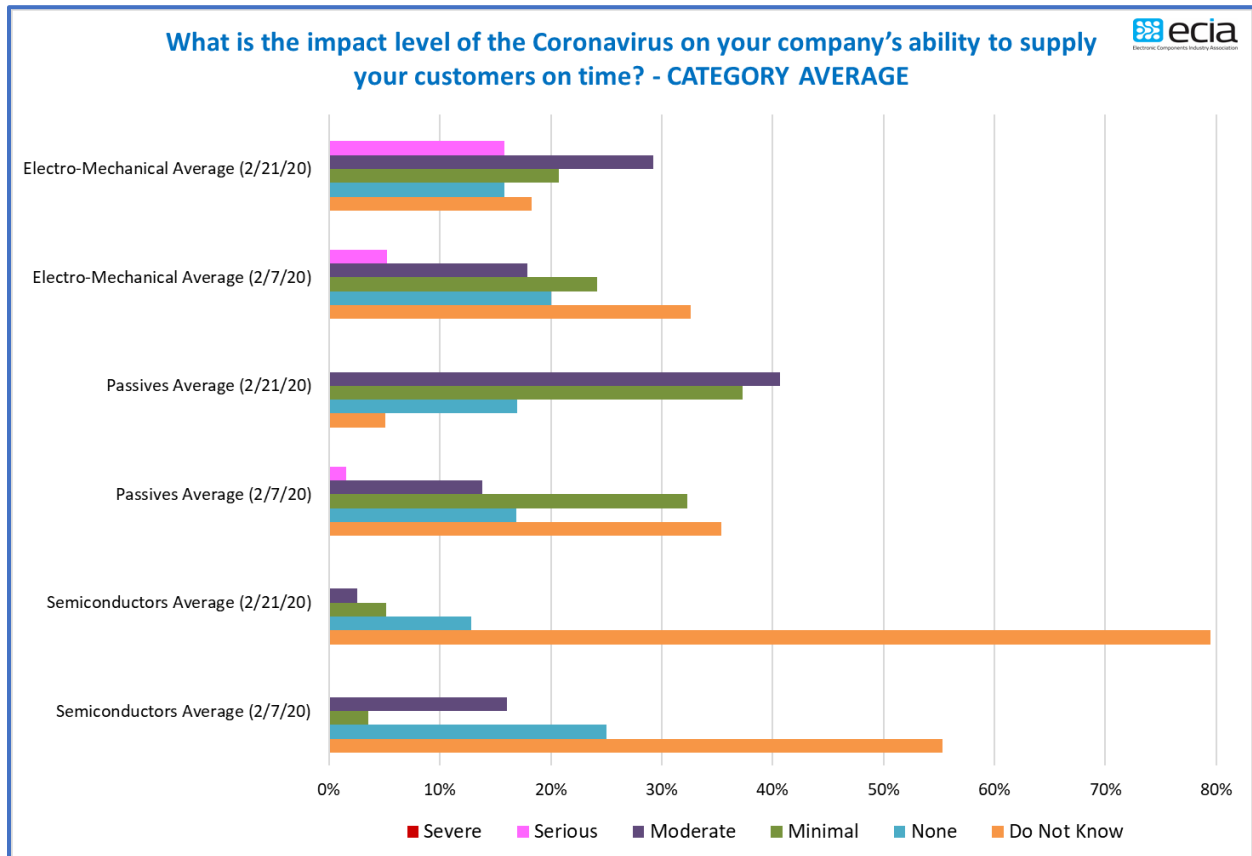
Top Level Averages

Even though the industry has previous experience with the disruptive SARS epidemic, the regional distribution of electronics production and structure of supply chains has changed significantly in the intervening years. In this follow-on to the initial ECIA survey, many more respondents were able to share that they were gaining visibility on the impact of this crisis on their supply chains. Encouragingly, in the Electro-Mechanical and Passive segments the anticipated impact is expected to be moderate to minimal in most cases. However, the impact is expected to add 1 and 2+ weeks lead time to component supply.

The semiconductor industry continues to struggle with the poorest visibility.

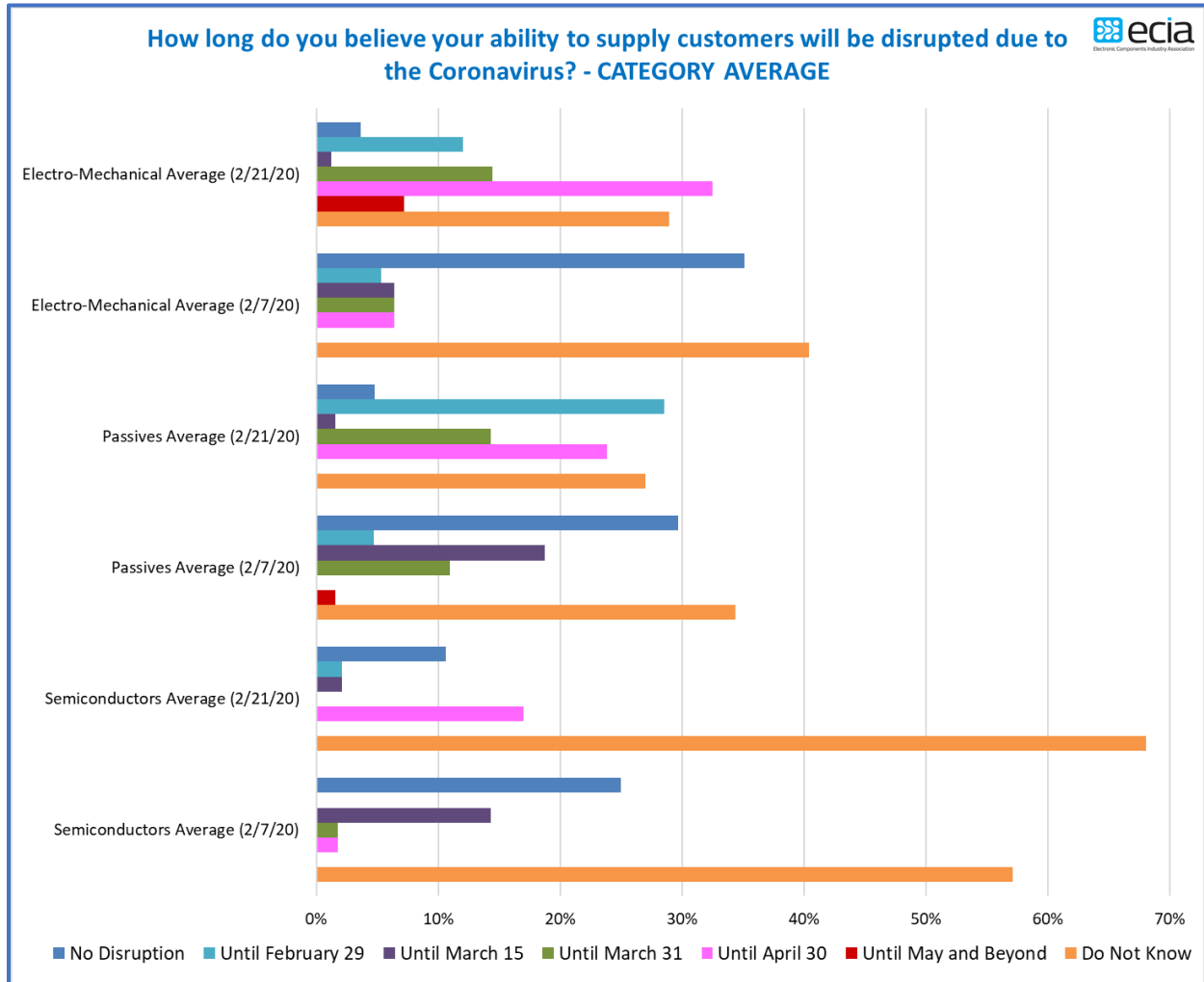
Analysis of the survey results points to the need for continued research as companies continue to improve their understanding of how the Coronavirus is/will impact their supply chains.

Figure 2 – On Time Supply Impact Average on Top Level Categories



Source: ECIA

Figure 3 – Supply Disruption Recovery Average on Top Level Categories



Source: ECIA