



**TPC Electronic Industry  
Coronavirus (COVID-19) Impact Survey  
March 9, 2020**

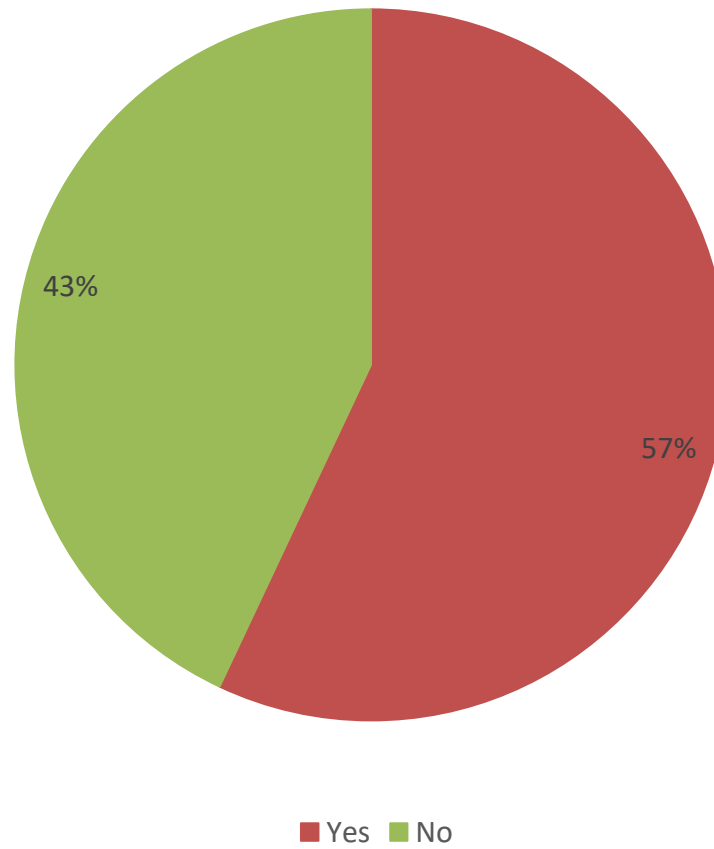
# TPC Electronic Industry COVID-19 Impact Survey

Survey Date: March 5-8 Respondents: ~4000 Location: Worldwide/China focus (~85% China) Who: Active Electronics Industry Professionals

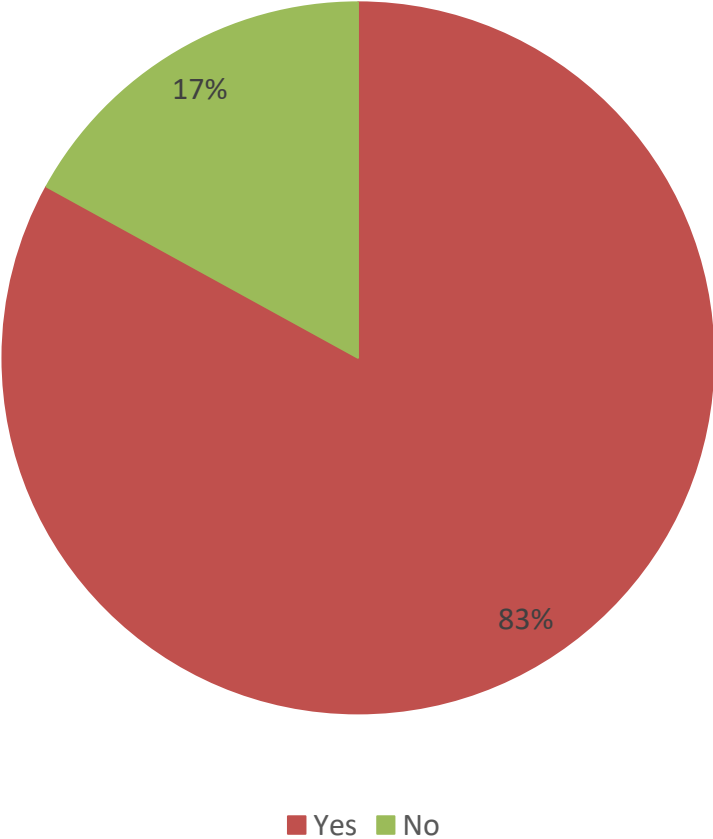
As a follow up to our ongoing research on the impact to the electronics supply chain in China from the COVID-19; we did our 2nd special survey. The survey had ~4000 respondents with ~85% located in China. Our key findings along with our supporting on the ground checks are as follows:

- 57% of the respondents are seeing an incremental negative impact over the past 2 weeks to demand and/or production from the virus; vs. 83% previously.
- Roughly one-third of the respondents see production down more than 10% for C1Q due to the virus' impact which is down vs. 48% from our February survey. Another 47% see it down 6-10% vs. previous production plans.
- Only 16% think this shortfall in C1Q will be made up in C2Q which is down from 44% in last month's survey.
- 28% are saying the production shortfall will never be fully made up.
- Regarding the C2Q shortfall, ~19% (vs. 70% previously) of these responses believe there will not be enough workers back by C2Q to make up the C1Q production deficit; while ~51% (vs. 65% previously) believe there will not be enough components available in C2Q to make up the shortfall.
- Only ~7% (vs. 25% previously) see any demand being destructed in C2Q because of production shortfalls in C1Q.
- 28% of the respondents see 5% or less demand destruction from the virus while 45% see 6-10% demand destruction.

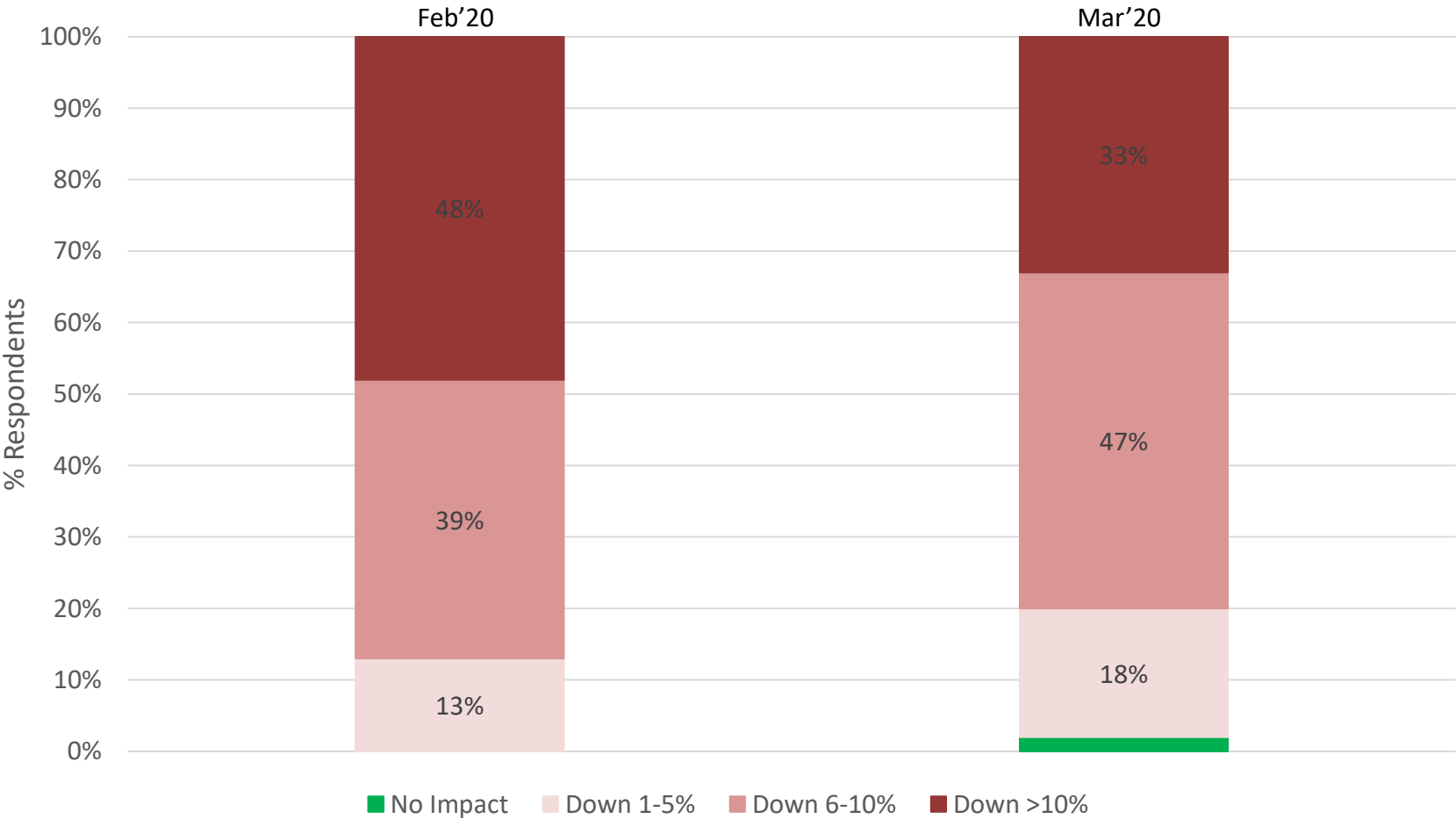
Have you seen any additional negative impact to component demand and/or production due to the COVID-19 over the last 2 weeks?



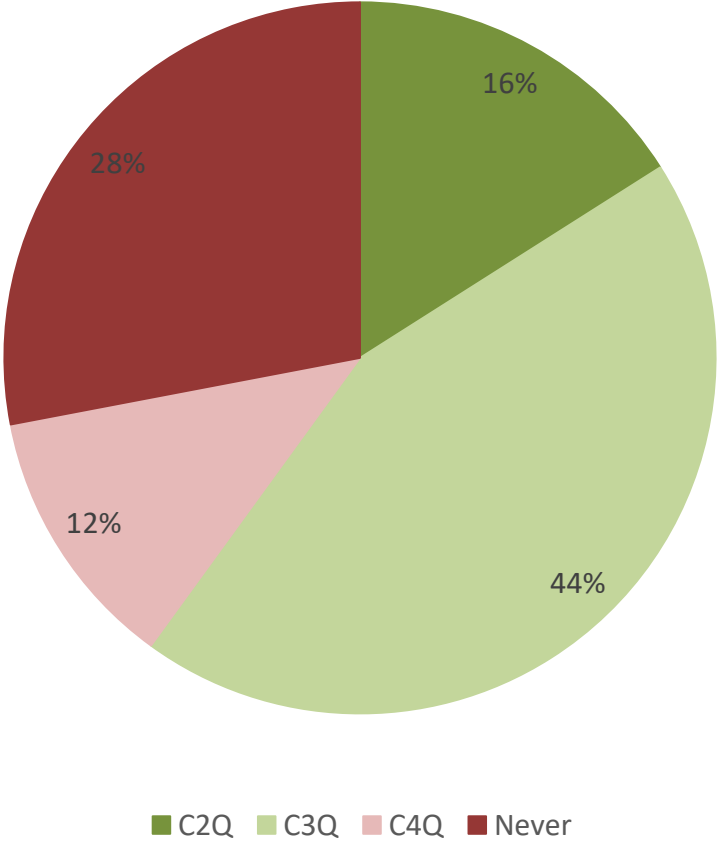
# February Survey: Have you seen a negative impact to component demand and/or production due to the COVID-19?



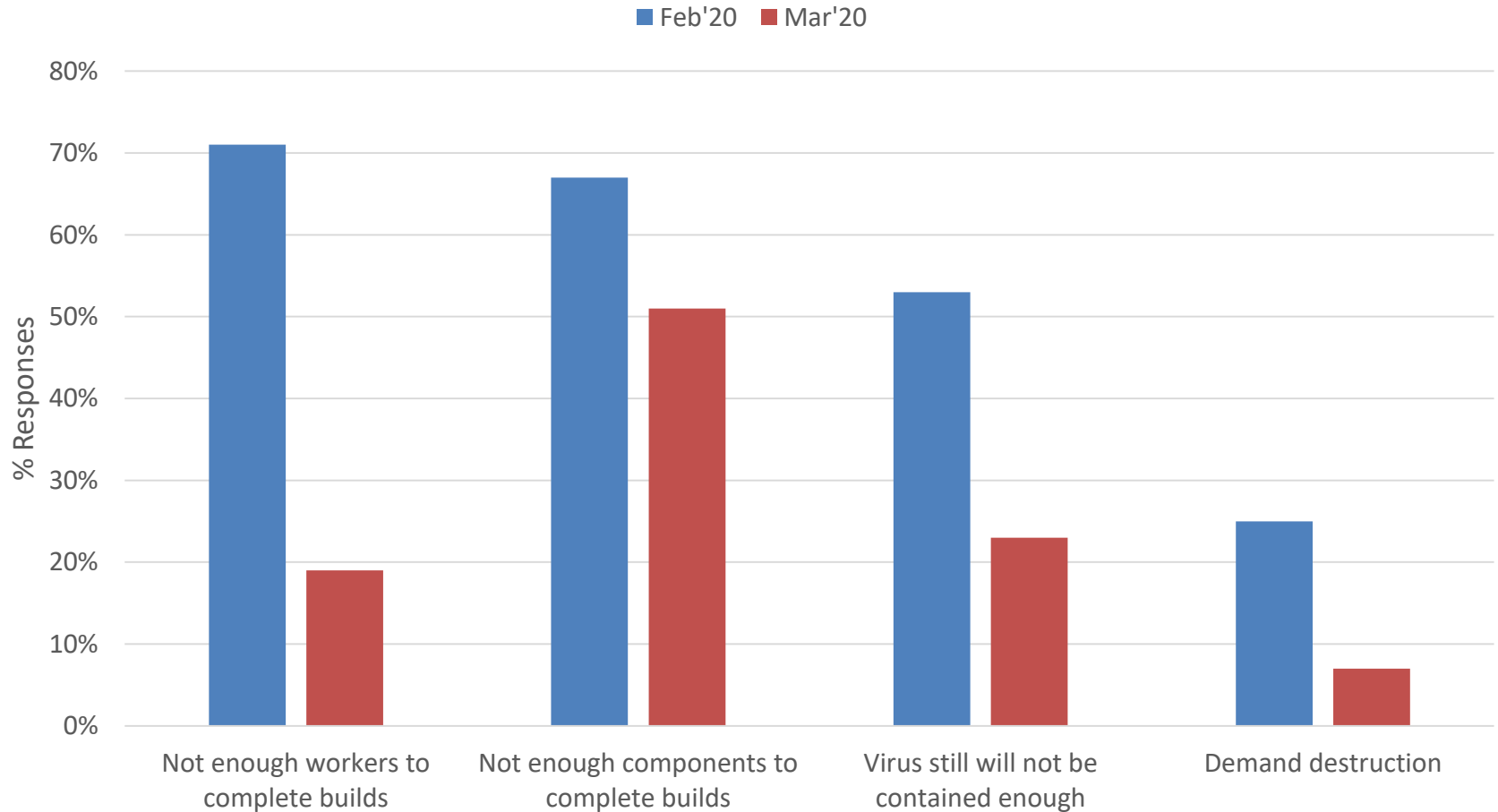
# What % do you think this will impact C1Q's electronics production vs. previous plans?



# When do you think this shortfall in production delta will be made up?



# If production delta will not be recovered in C2Q, why? (multiple answers OK)



# How much demand destruction (if any) do you think we will see due to the virus?

