As a follow up to our ongoing research on the impact to the electronics supply chain in China from the Coronavirus (COVID-19); we did our 4th special survey. The survey had ~6700 respondents with ~85% located in China. Our key findings along with our supporting on the ground checks are as follows:

- Only 28% of the respondents are seeing an incremental negative impact over the past 4 weeks to demand and/or production from the virus; vs. 31% last month and 48% in March.
- Roughly 85% of the respondents see production down only 5% or less for C2Q due to the virus’ impact.
- Now 37% think the production shortfall in C1Q will be made up in C2Q while 59% believe it will be made up in C3Q.
- Less than 1% are saying the production shortfall will never be fully made up vs. 15% in the April survey.
- Regarding the C2Q shortfall, ~7% (vs. 14% previously) of these responses believe there will not be enough workers back by C2Q to make up the C1Q production deficit; while ~35% (vs. 37% in April & 47% in March) believe there will not be enough components available in C2Q to make up the shortfall.
- Now 63% (vs. 58% in March & 37% in April) of the respondents see 5% or less demand destruction; while only 7% see >10% demand destruction (vs. 10% in April & 24% in March).
- The weighted average of this survey’s demand destruction due to COVID-19 is ~4-5% vs. ~5-6% in the April survey and ~7-8% in the March survey.
Have you seen any additional negative impact to component demand and/or production due to COVID-19 over the last 4 weeks?
What % of C2Q’s electronics production do you think this will impact vs. previous plans?

Mar, 43%
Apr, 57%
May, 45%

Mar, 36%
Apr, 34%
May, 42%

Mar, 14%
Apr, 6%
May, 11%

Mar, 7%
Apr, 3%
May, 2%

Mar, 7%
Apr, 3%
May, 2%

June 2020 COVID-19 Impact Survey

TPC Proprietary
When do you think the production shortfall from COVID-19 will be made up?
If production delta will not be recovered by C2Q, why? (multiple answers OK)

- Not enough workers to complete builds
- Not enough components to complete builds
- Virus still will not be contained enough
- Demand destruction

% Responses

Feb  
Mar  
Apr  
May

June 2020 COVID-19 Impact Survey  
TPC Proprietary
How much demand destruction (if any) do you think we will see due to COVID-19?
How much demand destruction (if any) do you think we will see due to COVID-19?

June 2020 COVID-19 Impact Survey

TPC Proprietary