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 5th special survey. The survey had ~7200 respondents with ~85% located in China. Our key findings along with our supporting on the ground checks are as follows:

• Only 23% of the respondents are seeing an incremental negative impact over the past 4 weeks to demand and/or production from the virus; vs. 28% last month and 31% in April.
• 93% of the respondents see production down only 5% or less for C2Q due to the virus’ impact.
• Now 14% think the production shortfall in C1Q & early C2Q will be made up in C2Q while 67% believe it will be made up in C3Q (up from 59%).
• 7% are saying the production shortfall will never be fully made up vs. 1% in the May survey.
• Regarding the shortfall, ~51% of these responses believe the virus will not be contained enough to make up the production deficit. this is the #1 reason now and a significant shift in what the supply chains are thinking will hamper the recovery.
• 26% (vs. 35% in May) believe there will not be enough components available in to make up the shortfall.
• Now 73% (vs. 63% in May & 58% in April) of the respondents see 5% or less demand destruction; while only 11% see >10% demand destruction.
• The weighted average of this survey’s demand destruction due to COVID-19 is ~4-5%.
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%
Jun 67%

Mar 36%
Apr 34%
May 42%
Jun 26%

Mar 14%
Apr 6%
May 11%
Jun 6%

Mar 7%
Apr 3%
May 2%
Jun 1%

No Impact
Down 1-5%
Down 6-10%
Down >10%

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

June 2020 COVID-19 Impact Survey

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

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<th>% Responses</th>
<th>February</th>
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How much demand destruction (if any) do you think we will see due to COVID-19?

May
- 30% None
- 46% 0-5%
- 17% >15%

June
- 52% None
- 21% 0-5%
- 17% >15%
- 10% 6-10%
- 1% 11-15%