



**TPC Electronic Industry Tariff Survey**  
**June 4, 2019**

# TPC Electronic Industry Tariff Survey Summary

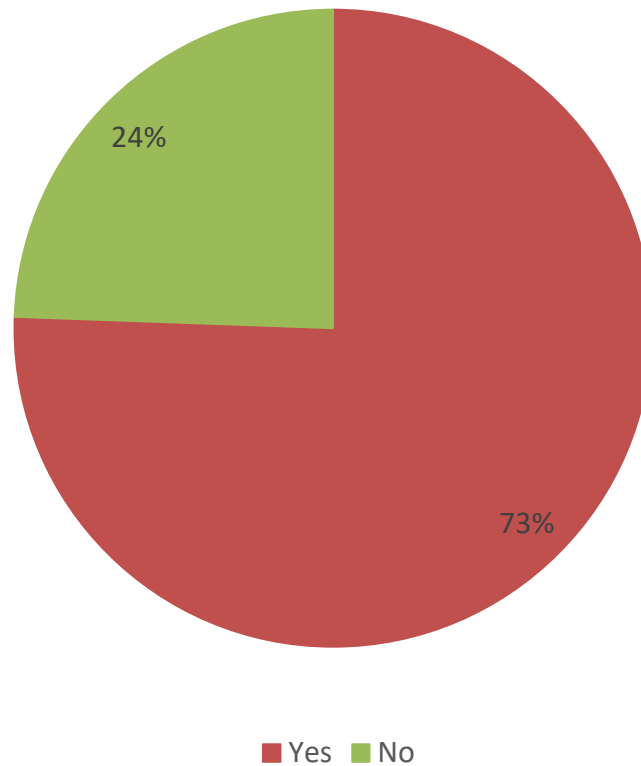
Respondents: ~1200 Location: Worldwide Who: Active Electronics Industry Professionals

We ran our 4th special survey on tariffs to a segment of our industry data base over the last week that focused on possible impact on the electronics supply chain and subsequent component demand from tariffs and subsequent trade issues. We have included our previous survey results for reference. Our key findings are:

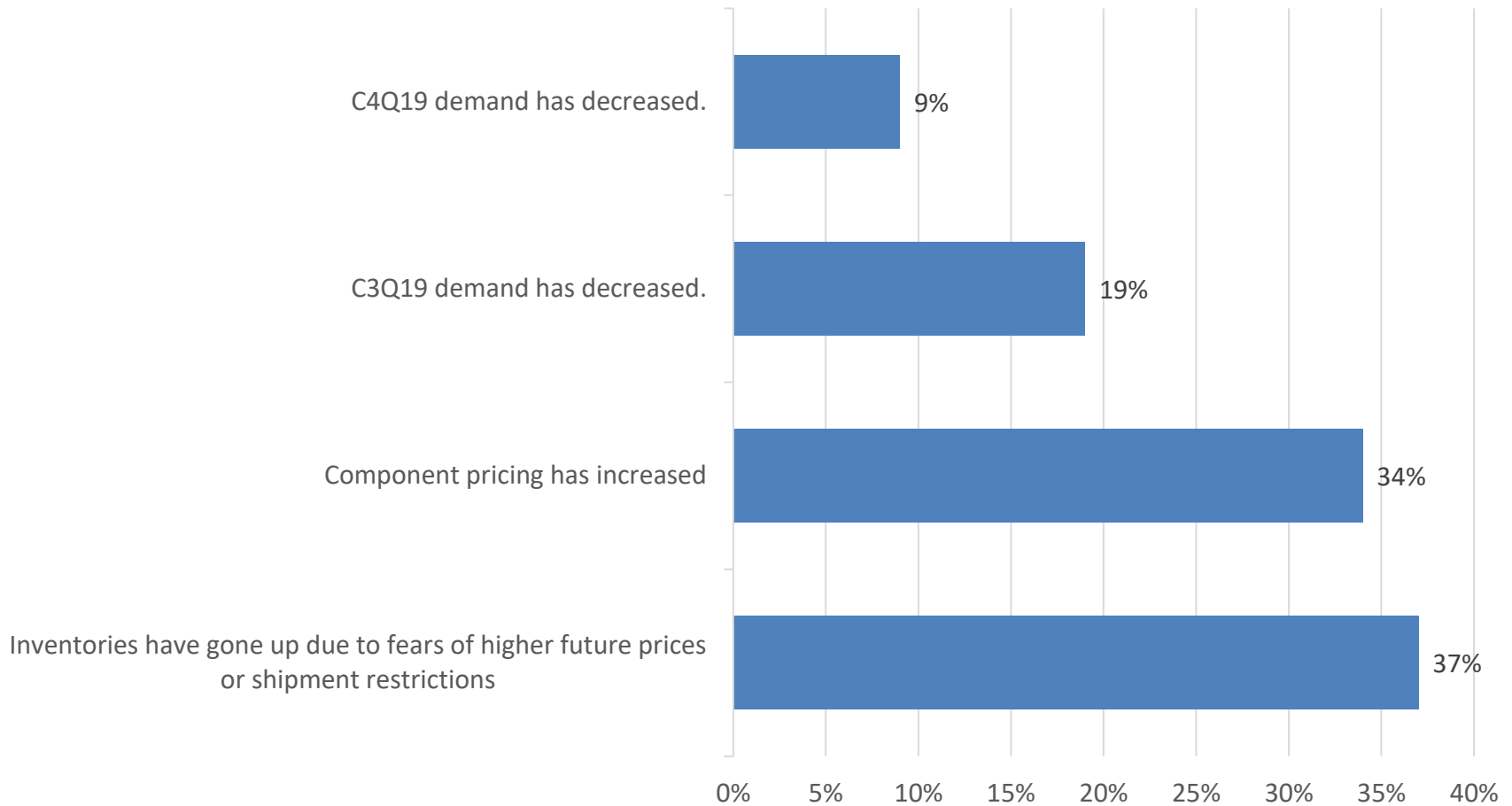
- 73% of the respondents are seeing INCREMENTAL NEGATIVE impact.
- 34% believe C2Q19 demand will be worse due to tariffs while only 12% believe it will be better.
- 19% are seeing C3Q19 demand decrease while 9% are seeing C4Q19 demand decrease.
- 34% are seeing increased pricing due to tariffs.
- 37% are seeing inventories increase due to fear of higher prices and shipment restrictions.
- 53% are not sure when the Huawei ban will end; while 30% believe it will end by the end of C3Q19.
- CPU/MCU's & NAND are viewed as the most impacted sectors with DRAM's and FPGA's the least.

Over the last month, have you or are you seeing any additional NEGATIVE impact in Component demand for C3Q19 or C4Q19 due to concerns over tariffs and the China/U.S. relationship?

June '19 Survey

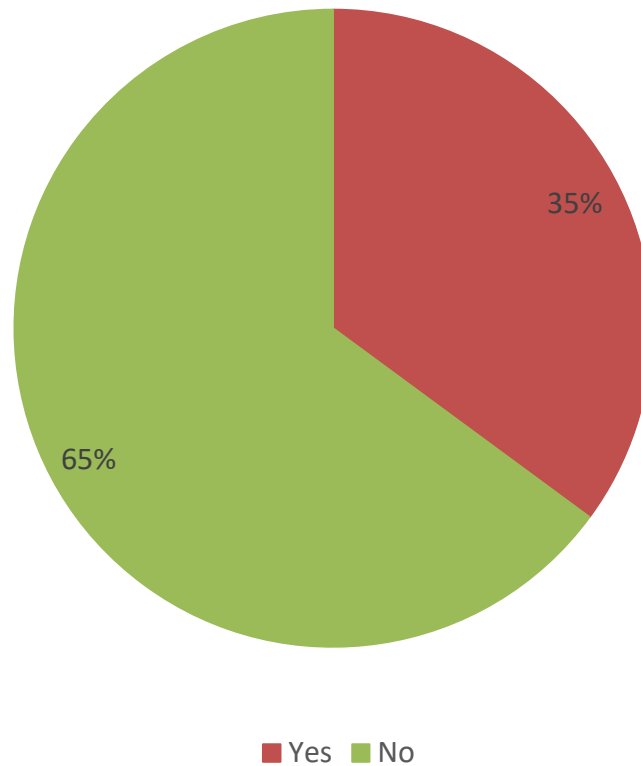


# If yes to previous question, what has been the impact? (multiple answers possible)



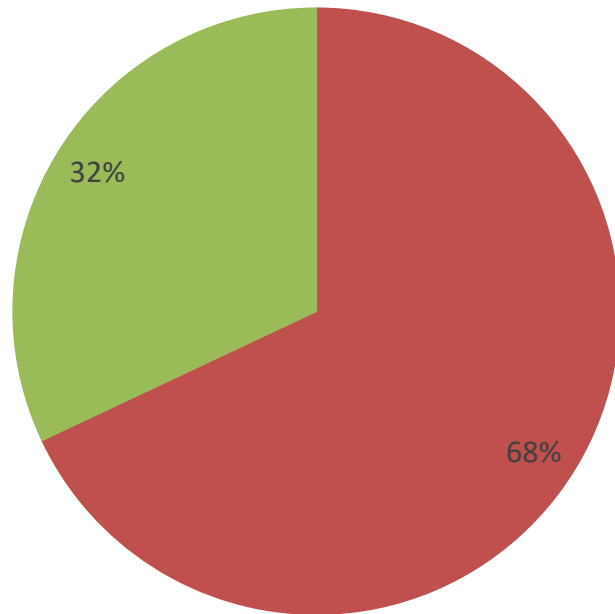
Over the last 2-4 weeks, have you seen any additional NEGATIVE impact in Component demand in C4Q18, C1Q19, or C2Q19 due to concerns?

Previous December '18 Survey



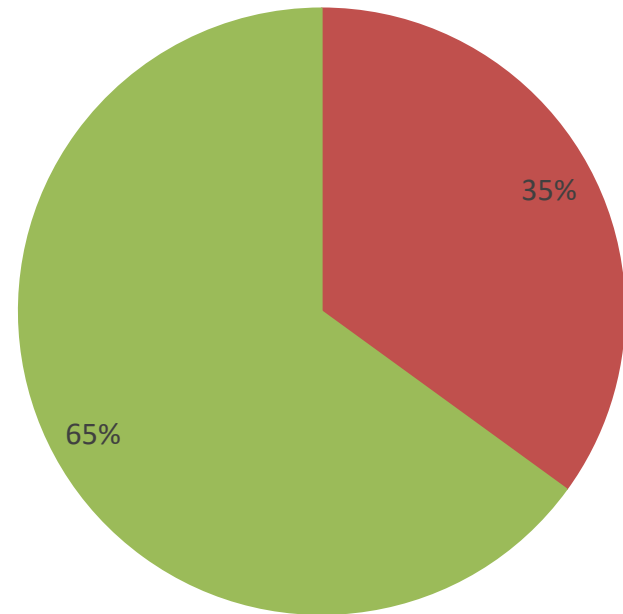
# Have you or are you seeing any impact in Component demand in C3Q18, C4Q18, or C1Q19 due to increasing tariffs?

## Previous October '18 Survey



■ Yes ■ No

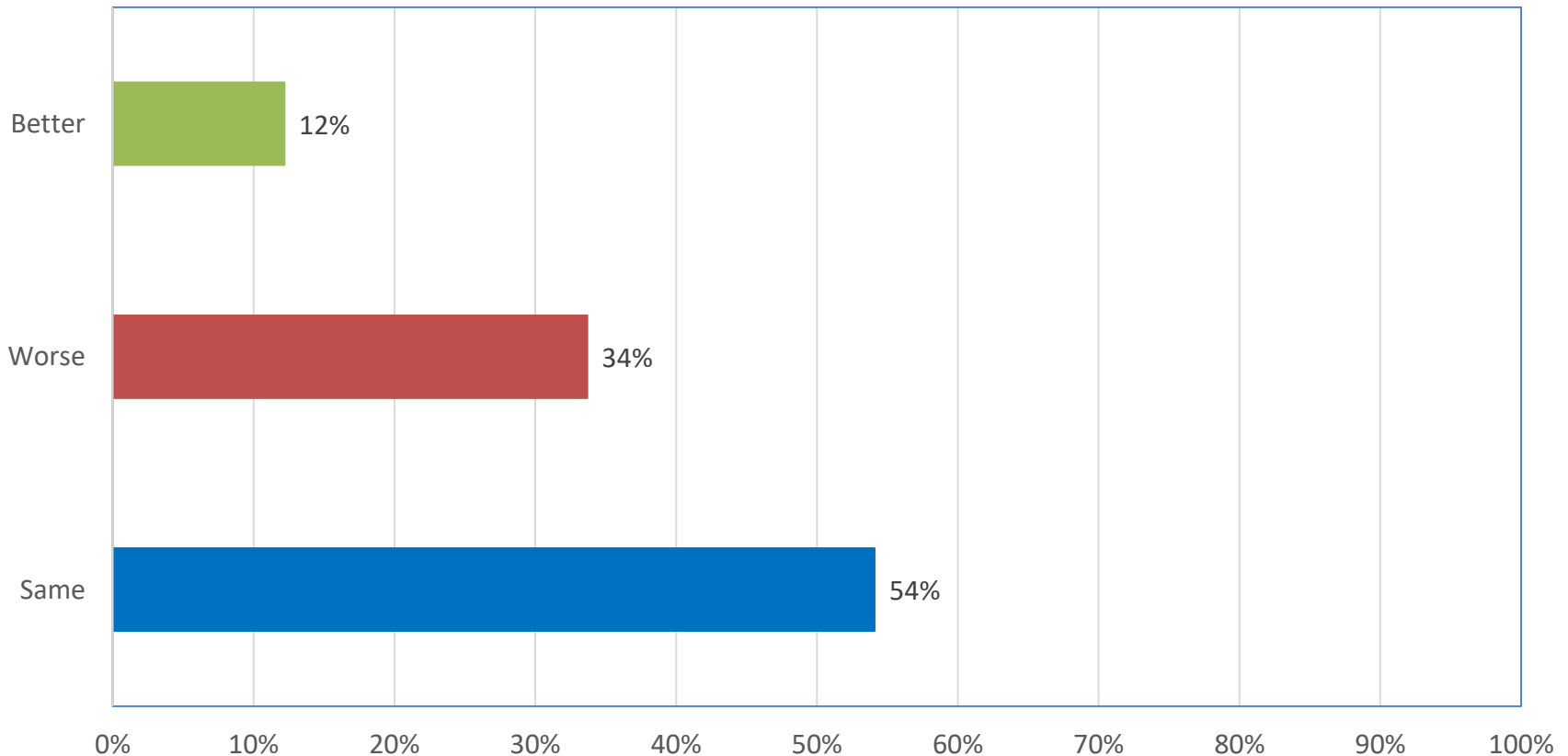
## Previous August '18 Survey



■ Yes ■ No

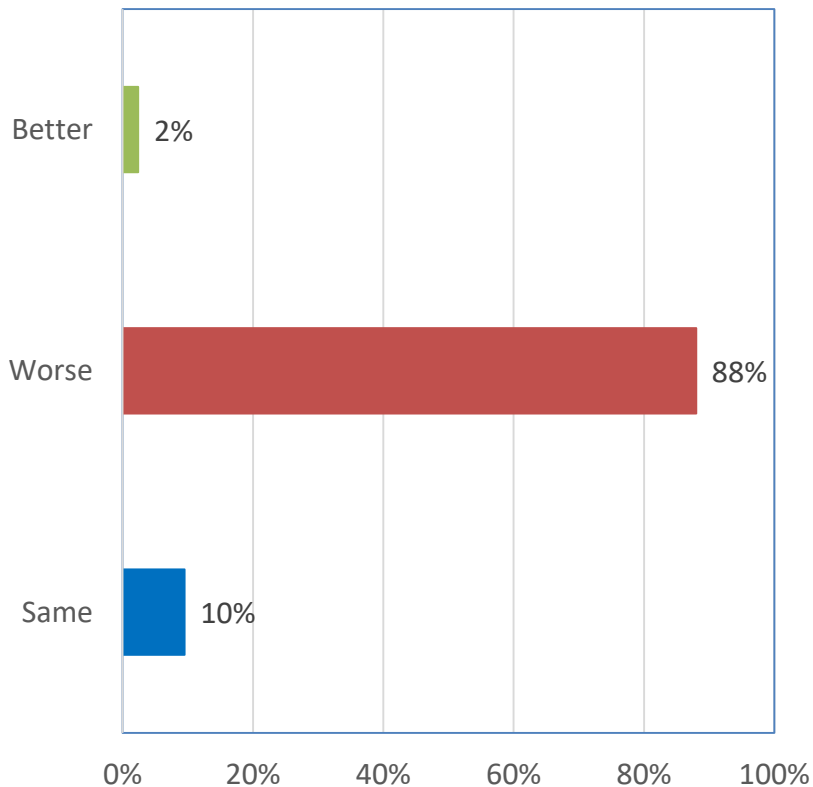
# Do you think component demand for C2Q19 will be better, worse or the same due to tariffs?

June '19 Survey

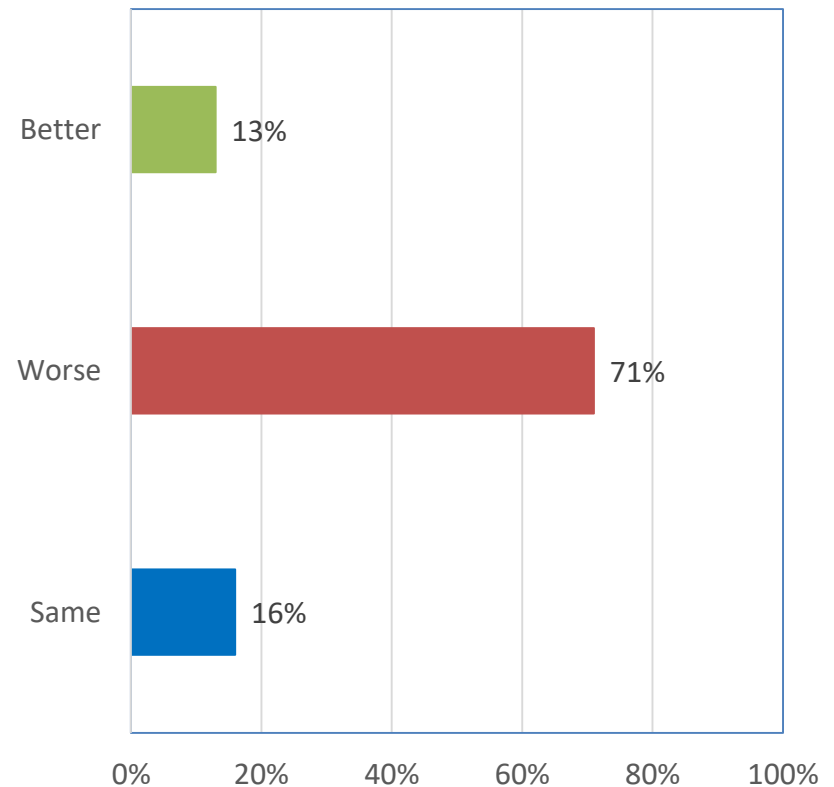


# Do you think component demand for C1Q19 will be better, worse or the same due to potential tariffs?

Previous December '18 Survey



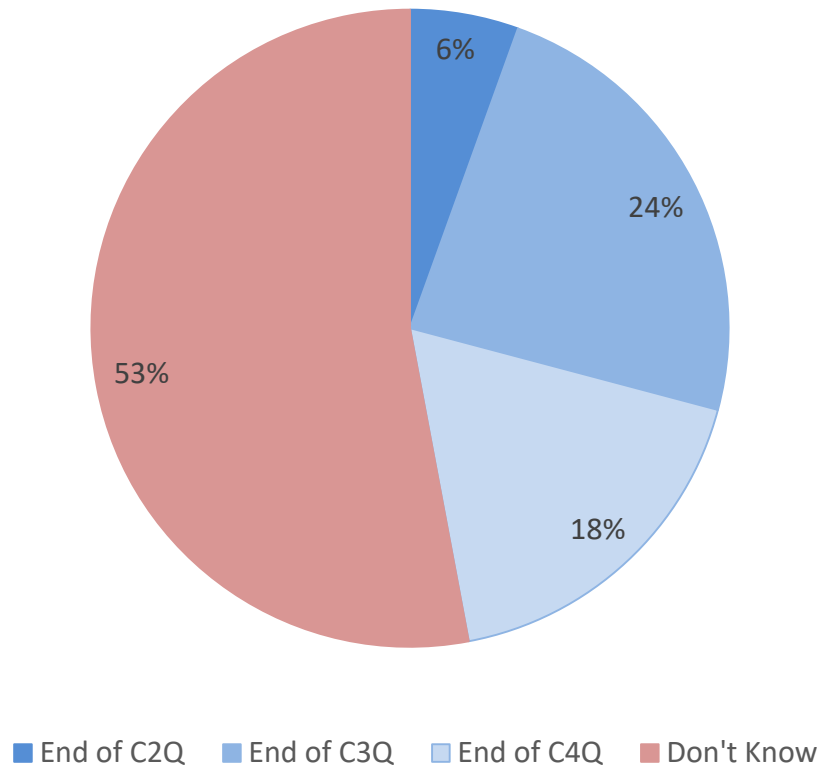
Previous October '18 Survey





# How long do you think the Huawei ban will last?

June '19 Survey



On a scale of most impacted to least impacted, please rate the following sectors for demand impact due to tariffs:

Scale	Sector Rank Jun '19	Sector Rank Dec '18	Sector Rank Oct '18
Most Impacted	CPU/MCU's	Analog	CPU's
	NAND	CPU's	Analog
	RF/Wireless	MCU's	MCU's
	Analog	NAND	NAND
	DRAM	RF/Wireless	RF/Wireless
Least Impacted	FPGA	DRAM	DRAM