

Coronavirus Survey

Results of Manufacturer & Distributor Survey Ended Feb 7, 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 a survey of member manufacturing and distributor companies to gain an understanding of this fluid situation. This report provides the results of the survey which ended February 7, 2020.

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. Given current expectations that this crisis will continue to evolve over the coming weeks ECIA will survey members again this week. ECIA members are encouraged to support this survey in order to enhance industry understanding of impact of the Coronavirus on the electronics components supply chain.

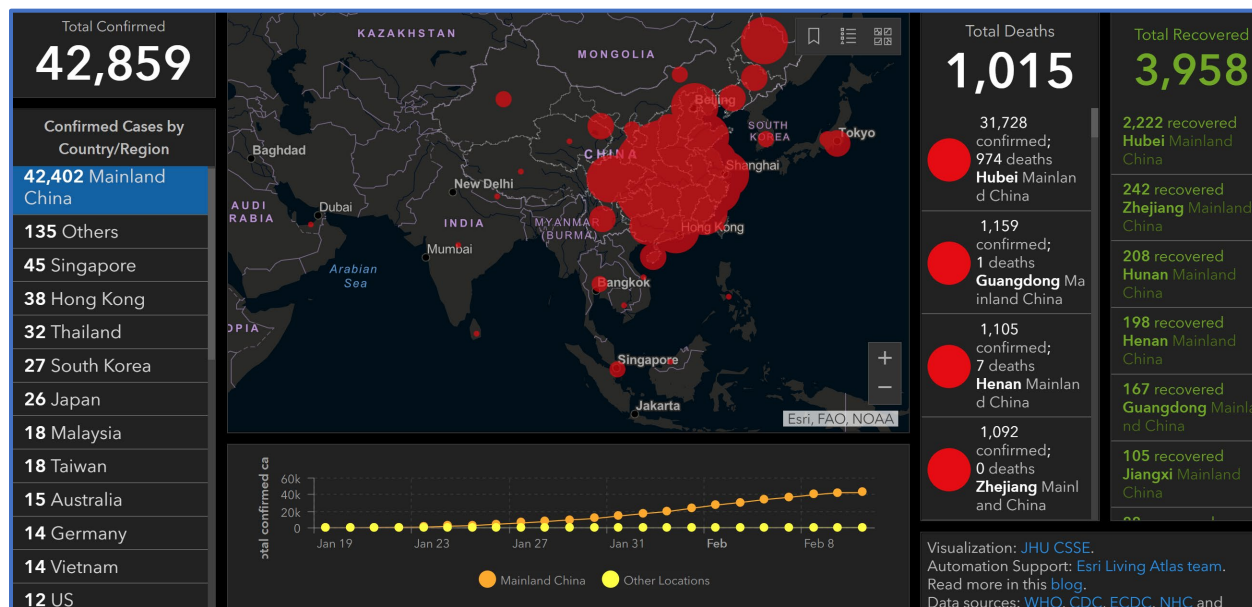
Detailed data by component type is provided for the major categories of:

- 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”](#)



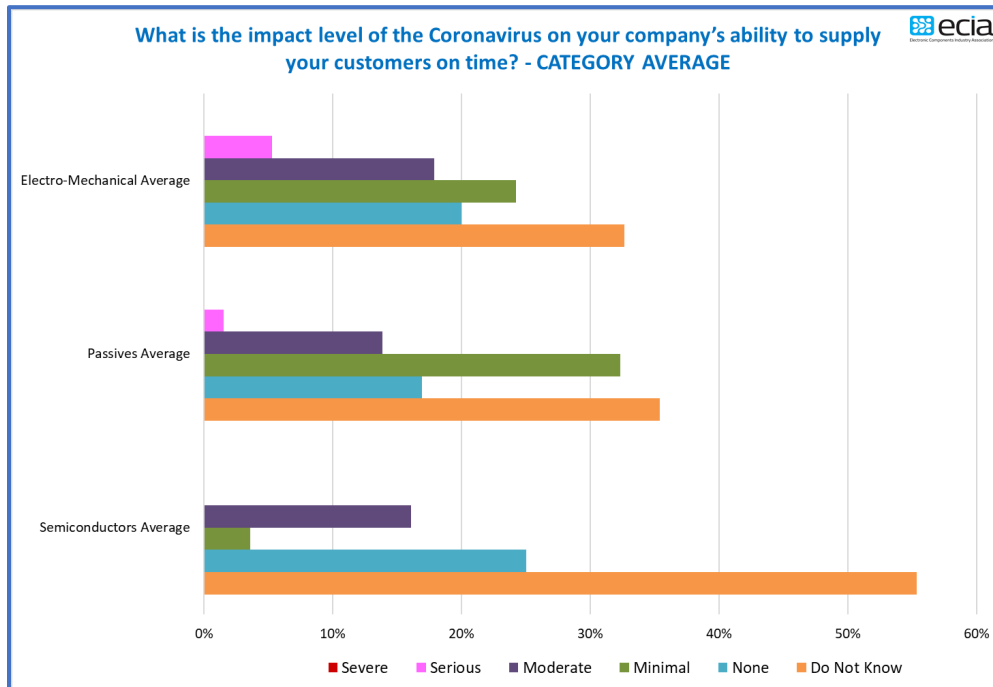
Top Level Averages

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. The most notable result from the surveys is that many, if not most, companies do not understand how their supply chains and customers will be impacted by this crisis. The semiconductor industry appears to struggle with the poorest visibility.

While the survey results show that most companies expect no or minimal impact, there are still a significant number that believe the disruption will last for a month or more. More surprising is the number of companies that believe the crisis will result in lead times extending by an addition two weeks or more.

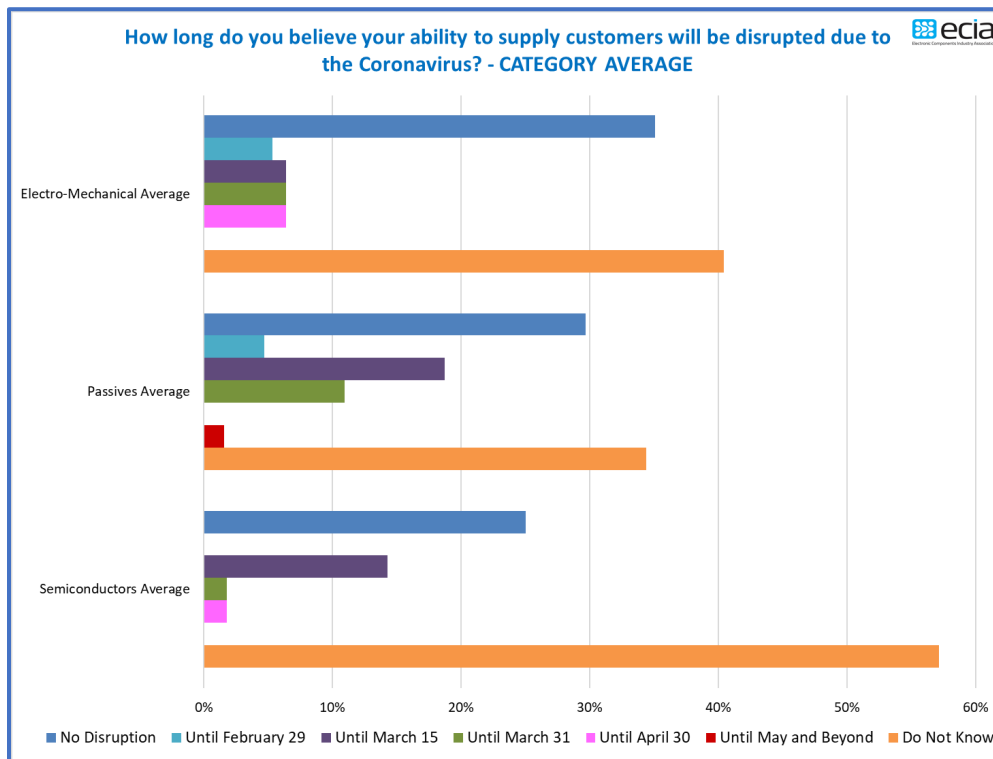
Brief analysis of the survey results point to the need for continued research as companies work to improve their understanding of how the Coronavirus is/will impact their supply chains.

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



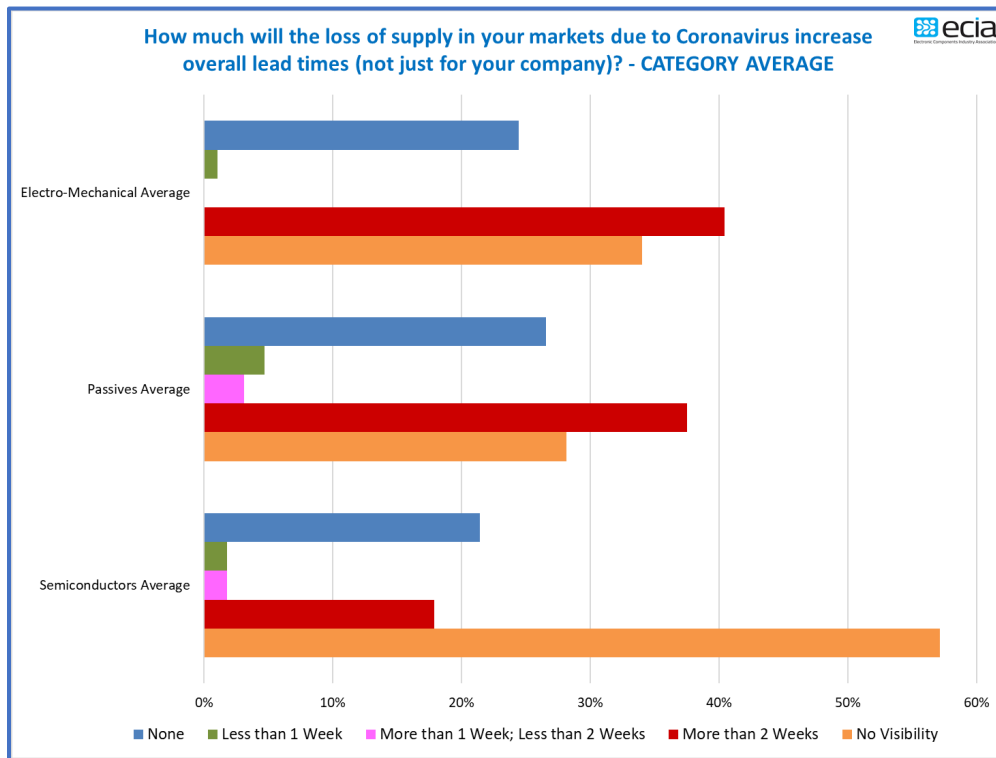
Source: ECIA

Figure 3 – Supply Disruption Recovery Average on Top Level Categories



Source: ECIA

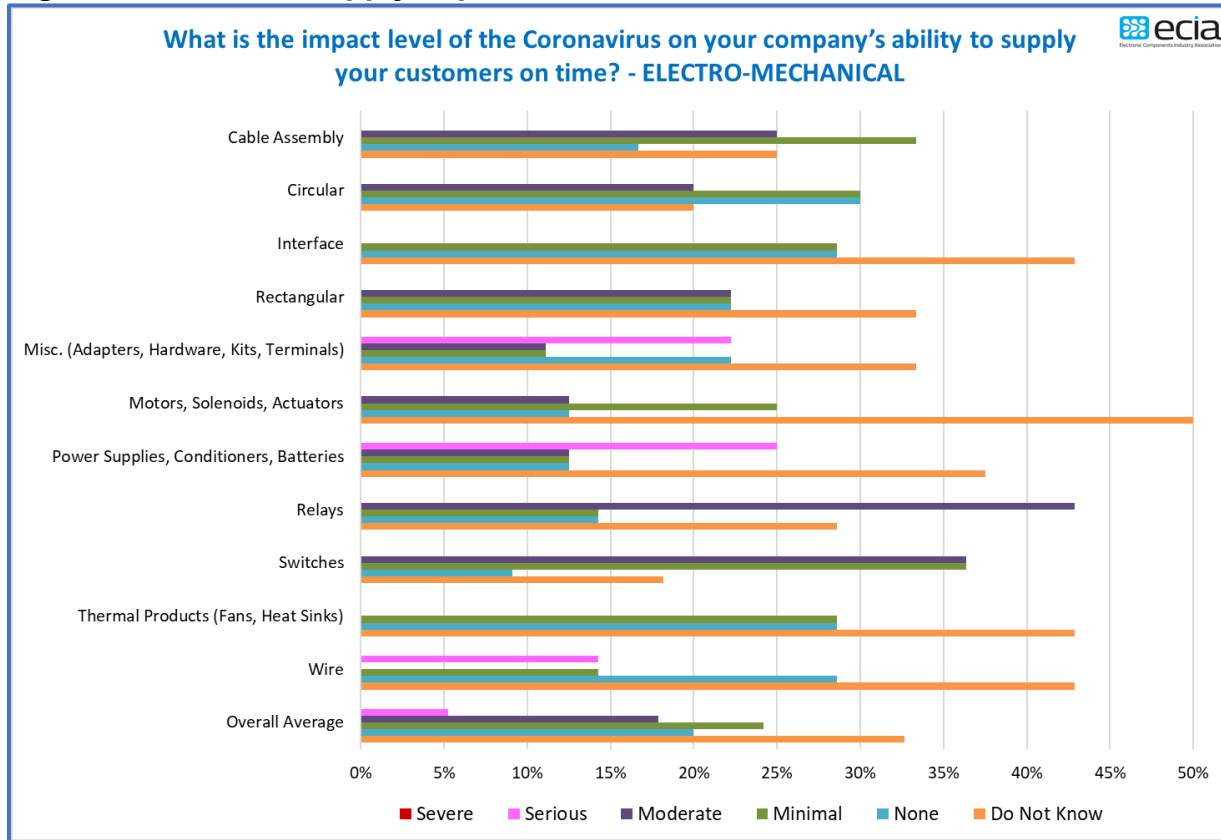
Figure 4 – Lead Time Impact Average on Top Level Categories



Source: ECIA

Electro-Mechanical Survey Results

Figure 5 – On Time Supply Impact – Electro-Mechanical



Source: ECIA

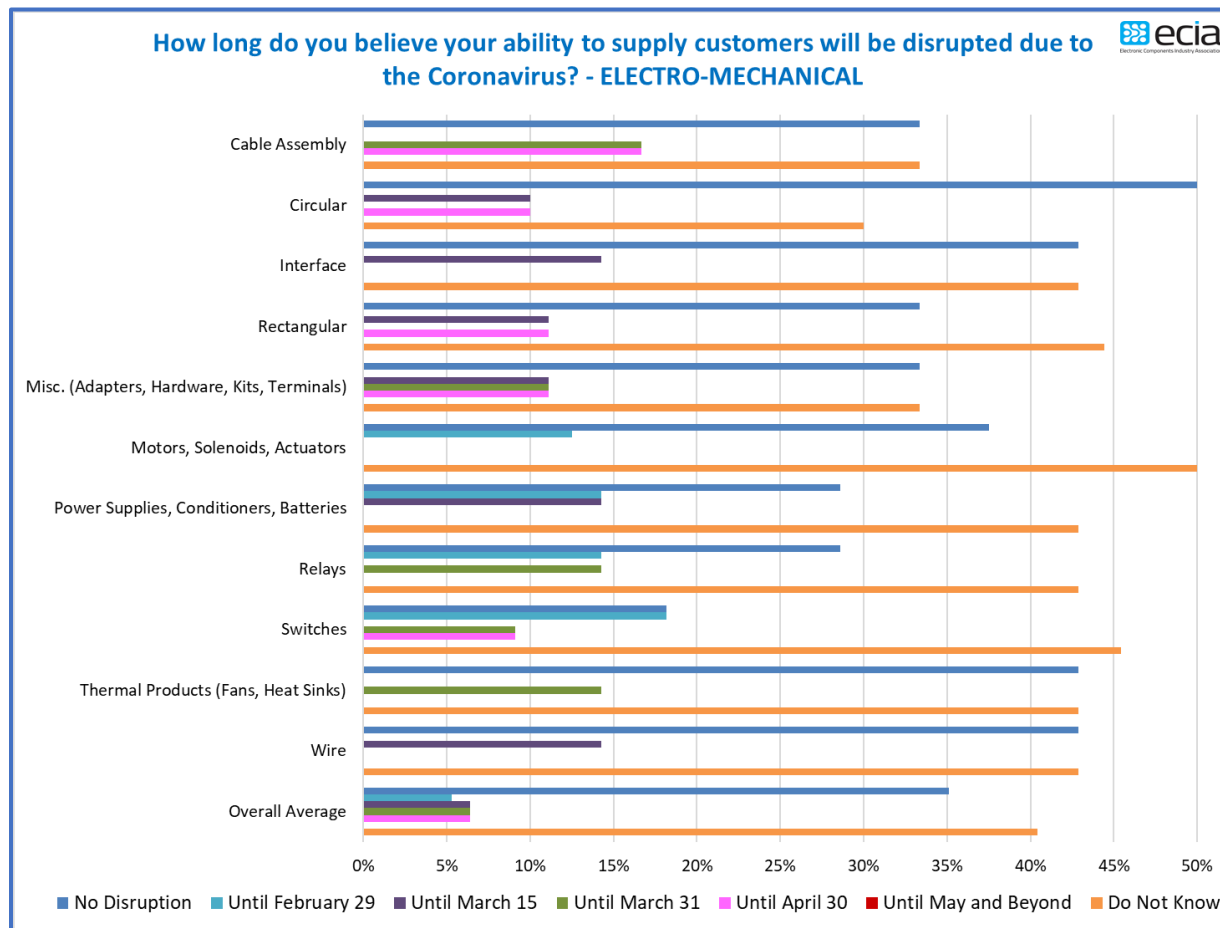
Table 1 – On Time Supply Impact – Electro-Mechanical

What is the impact level of the Coronavirus on your company's ability to supply your customers on time?

COMPONENT	Severe	Serious	Moderate	Minimal	None	Do Not Know
Cable Assembly	0%	0%	25%	33%	17%	25%
Circular	0%	0%	20%	30%	30%	20%
Interface	0%	0%	0%	29%	29%	43%
Rectangular	0%	0%	22%	22%	22%	33%
Misc. (Adapters, Hardware, Kits, Terminals)	0%	22%	11%	11%	22%	33%
Motors, Solenoids, Actuators	0%	0%	13%	25%	13%	50%
Power Supplies, Conditioners, Batteries	0%	25%	13%	13%	13%	38%
Relays	0%	0%	43%	14%	14%	29%
Switches	0%	0%	36%	36%	9%	18%
Thermal Products (Fans, Heat Sinks)	0%	0%	0%	29%	29%	43%
Wire	0%	14%	0%	14%	29%	43%
Overall Average	0%	5%	18%	24%	20%	33%

Source: ECIA

Figure 6 –Supply Disruption Recovery – Electro-Mechanical



Source: ECIA

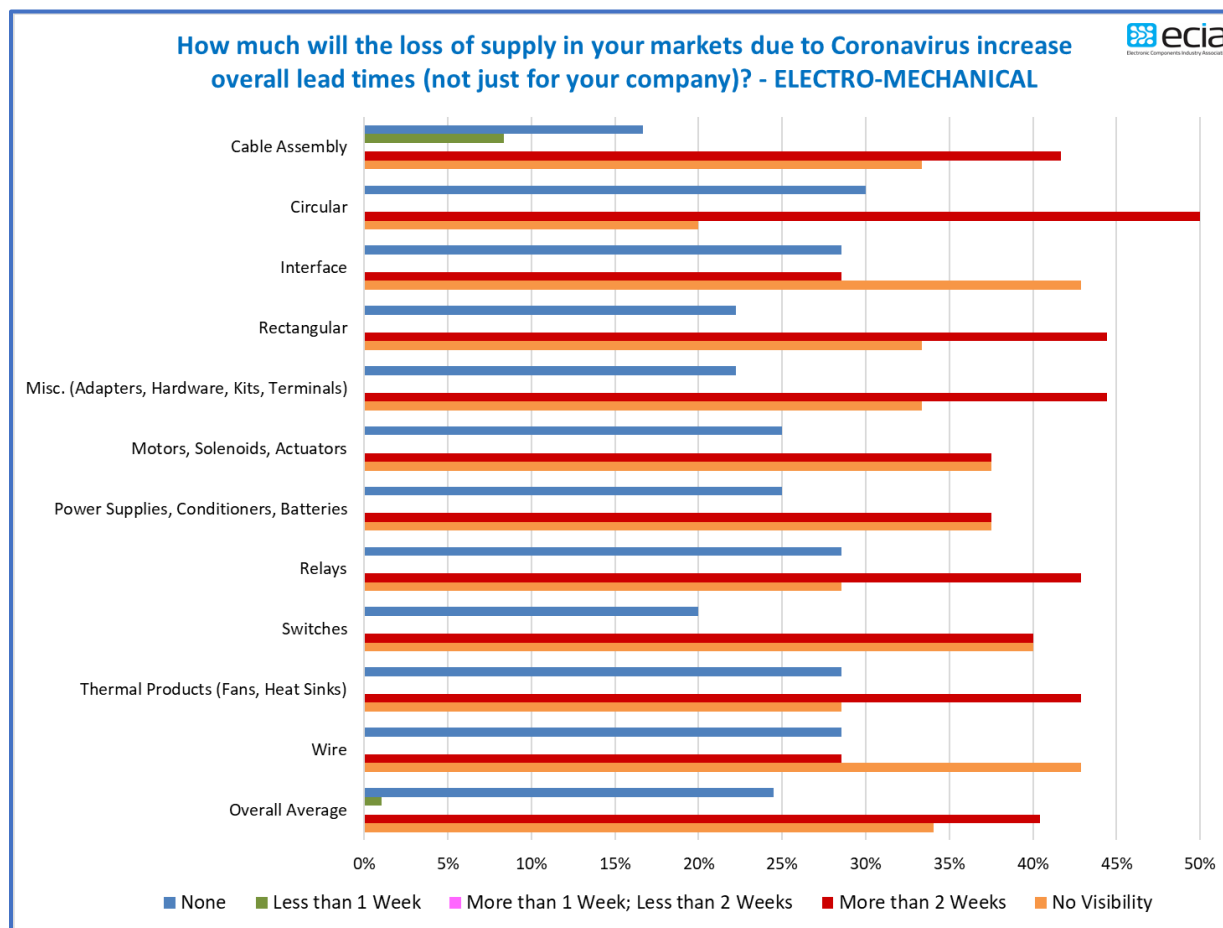
Table 2 –Supply Disruption Recovery – Electro-Mechanical

How long do you believe your ability to supply customers will be disrupted due to the Coronavirus?

COMPONENT	Until February 29					Until May and Beyond		Do Not Know
	No Disruption	29	Until March 15	Until March 31	Until April 30	Beyond		
Cable Assembly	33%	0%	0%	17%	17%	0%	33%	
Circular	50%	0%	10%	0%	10%	0%	30%	
Interface	43%	0%	14%	0%	0%	0%	43%	
Rectangular	33%	0%	11%	0%	11%	0%	44%	
Misc. (Adapters, Hardware, Kits, Terminals)	33%	0%	11%	11%	11%	0%	33%	
Motors, Solenoids, Actuators	38%	13%	0%	0%	0%	0%	50%	
Power Supplies, Conditioners, Batteries	29%	14%	14%	0%	0%	0%	43%	
Relays	29%	14%	0%	14%	0%	0%	43%	
Switches	18%	18%	0%	9%	9%	0%	45%	
Thermal Products (Fans, Heat Sinks)	43%	0%	0%	14%	0%	0%	43%	
Wire	43%	0%	14%	0%	0%	0%	43%	
Overall Average	35%	5%	6%	6%	6%	0%	40%	

Source: ECIA

Figure 7 – Lead Time Impact Average – Electro-Mechanical



Source: ECIA

Table 3 – Lead Time Impact Average – Electro-Mechanical

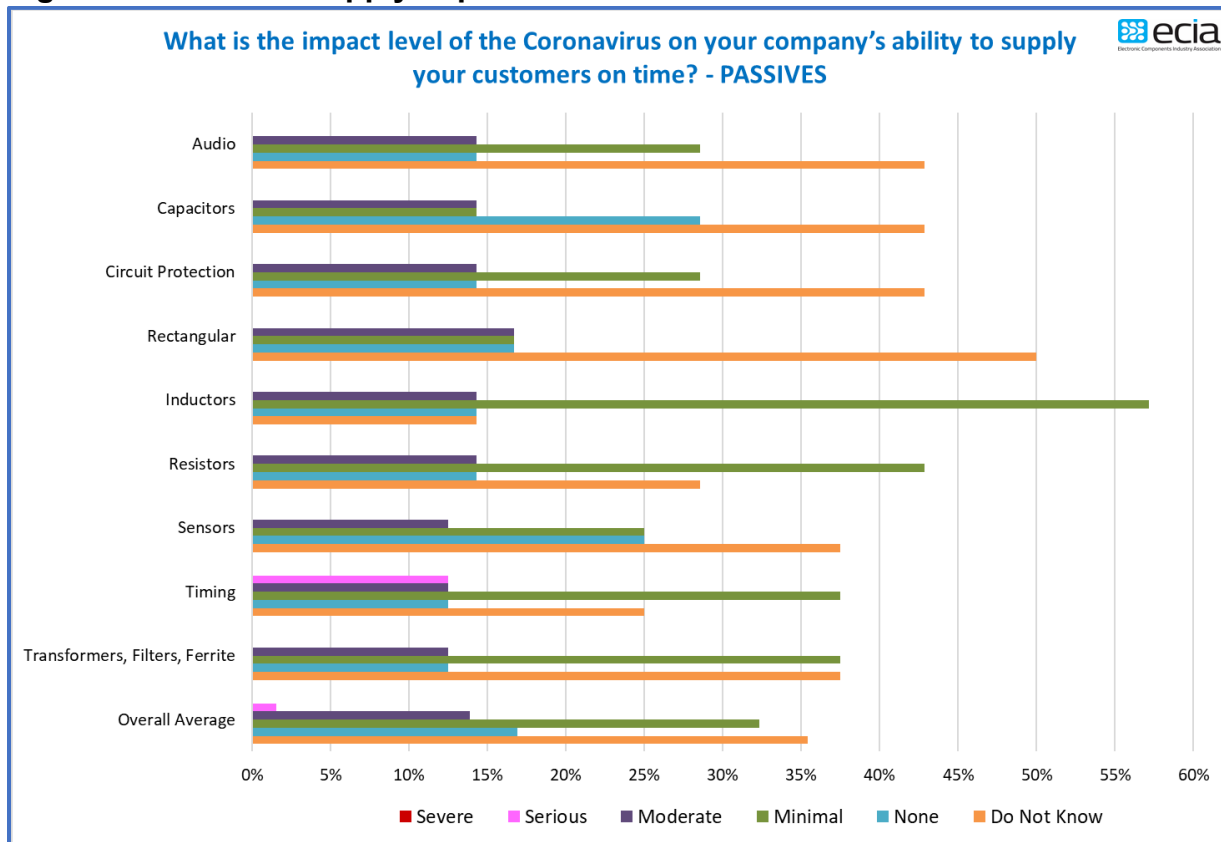
How much will the loss of supply in your markets due to Coronavirus increase overall lead times (not just for your company)?

COMPONENT	None	Less than 1 Week	More than 1 Week; Less than 2 Weeks	More than 2 Weeks	No Visibility
Cable Assembly	17%	8%	0%	42%	33%
Circular	30%	0%	0%	50%	20%
Interface	29%	0%	0%	29%	43%
Rectangular	22%	0%	0%	44%	33%
Misc. (Adapters, Hardware, Kits, Terminals)	22%	0%	0%	44%	33%
Motors, Solenoids, Actuators	25%	0%	0%	38%	38%
Power Supplies, Conditioners, Batteries	25%	0%	0%	38%	38%
Relays	29%	0%	0%	43%	29%
Switches	20%	0%	0%	40%	40%
Thermal Products (Fans, Heat Sinks)	29%	0%	0%	43%	29%
Wire	29%	0%	0%	29%	43%
Overall Average	24%	1%	0%	40%	34%

Source: ECIA

Passives Survey Results

Figure 8 – On Time Supply Impact – Passives



Source: ECIA

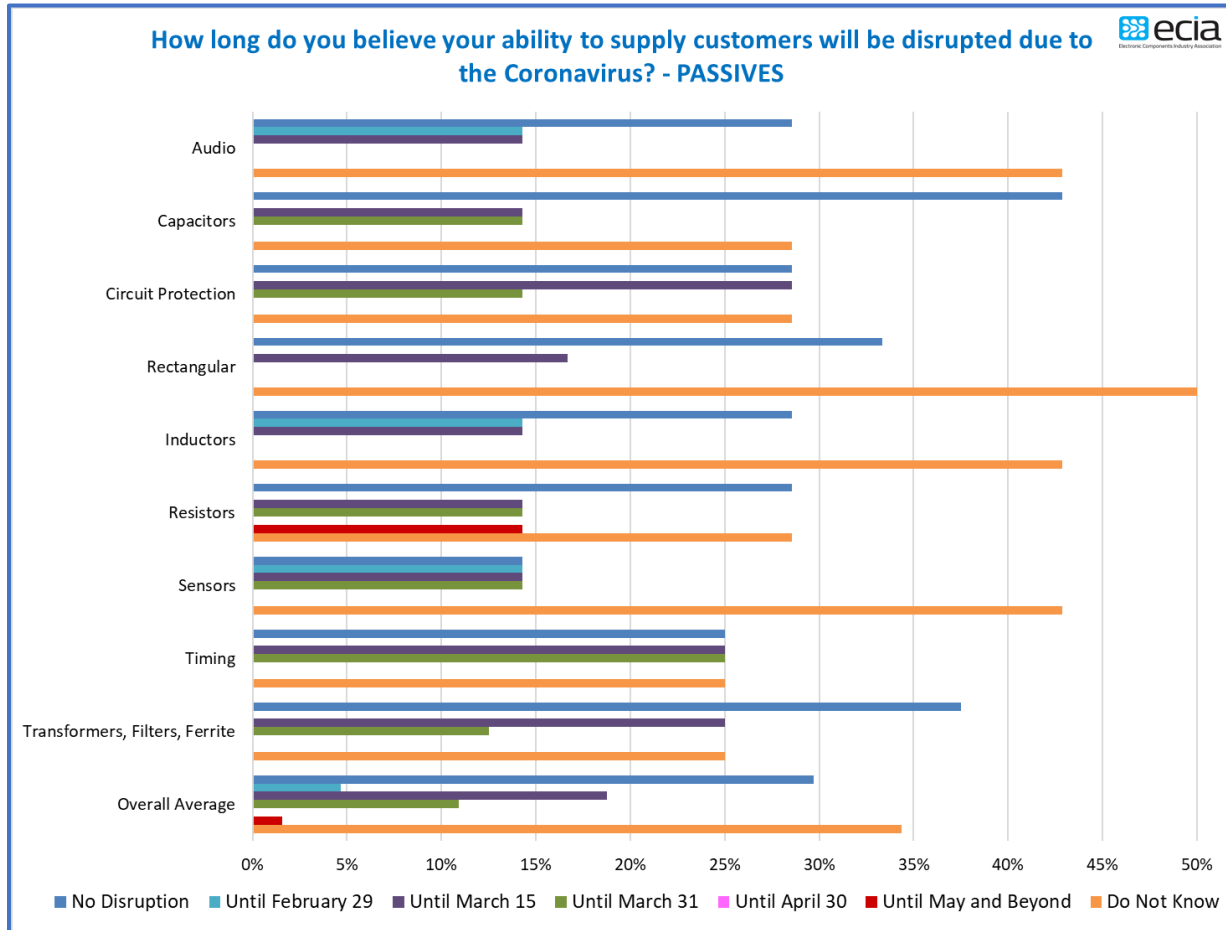
Table 4 – On Time Supply Impact – Passives

What is the impact level of the Coronavirus on your company's ability to supply your customers on time?

COMPONENT	Severe	Serious	Moderate	Minimal	None	Do Not Know
Audio	0%	0%	14%	29%	14%	43%
Capacitors	0%	0%	14%	14%	29%	43%
Circuit Protection	0%	0%	14%	29%	14%	43%
Rectangular	0%	0%	17%	17%	17%	50%
Inductors	0%	0%	14%	57%	14%	14%
Resistors	0%	0%	14%	43%	14%	29%
Sensors	0%	0%	13%	25%	25%	38%
Timing	0%	13%	13%	38%	13%	25%
Transformers, Filters, Ferrite	0%	0%	13%	38%	13%	38%
Overall Average	0%	2%	14%	32%	17%	35%

Source: ECIA

Figure 9 –Supply Disruption Recovery – Passives



Source: ECIA

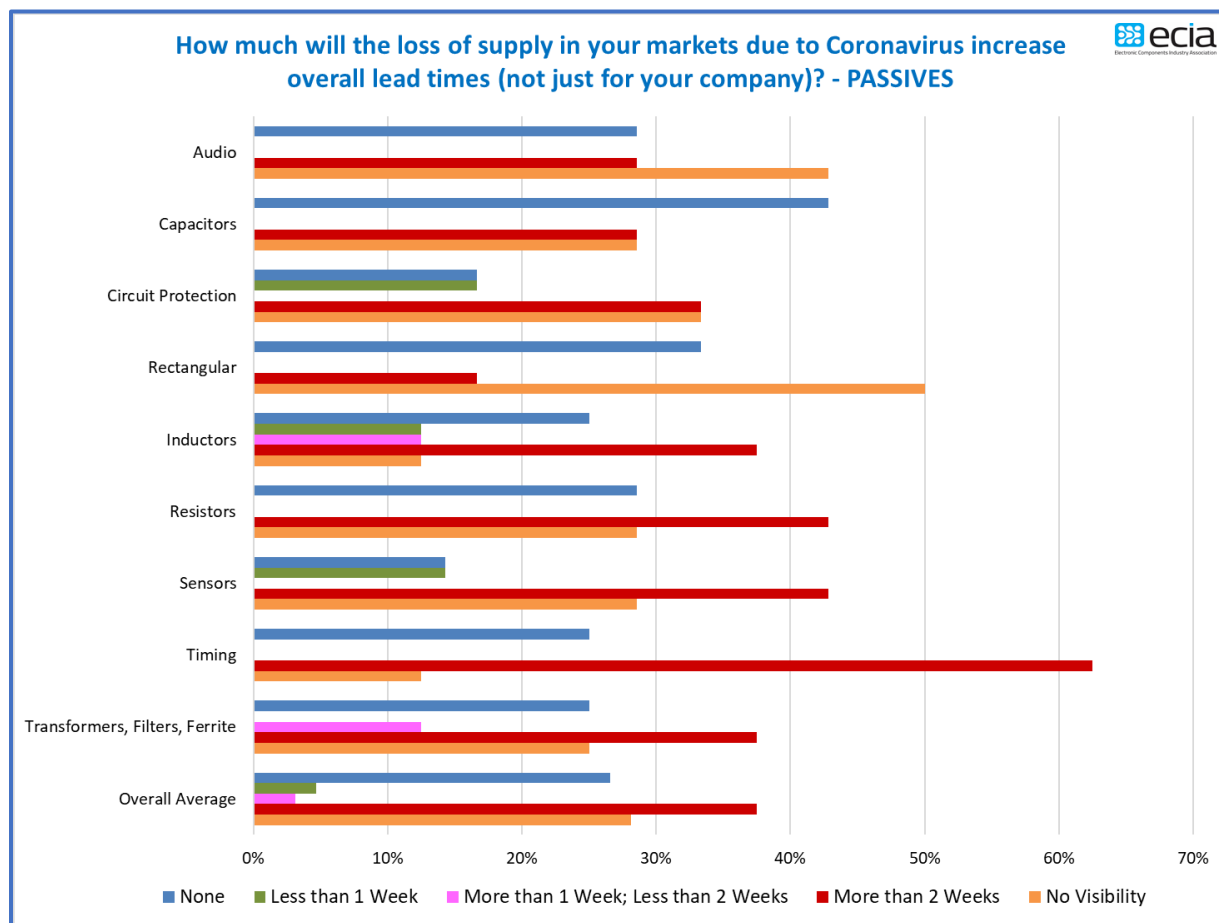
Table 5 –Supply Disruption Recovery – Passives

How long do you believe your ability to supply customers will be disrupted due to the Coronavirus?

COMPONENT	Until February 29						Until May and Beyond	Do Not Know
	No Disruption	29	Until March 15	Until March 31	Until April 30			
Audio	29%	14%	14%	0%	0%	0%	0%	43%
Capacitors	43%	0%	14%	14%	0%	0%	0%	29%
Circuit Protection	29%	0%	29%	14%	0%	0%	0%	29%
Rectangular	33%	0%	17%	0%	0%	0%	0%	50%
Inductors	29%	14%	14%	0%	0%	0%	0%	43%
Resistors	29%	0%	14%	14%	0%	14%	0%	29%
Sensors	14%	14%	14%	14%	0%	0%	0%	43%
Timing	25%	0%	25%	25%	0%	0%	0%	25%
Transformers, Filters, Ferrite	38%	0%	25%	13%	0%	0%	0%	25%
Overall Average	30%	5%	19%	11%	0%	2%	0%	34%

Source: ECIA

Figure 10 – Lead Time Impact Average – Passives



Source: ECIA

Table 6 – Lead Time Impact Average – Passives

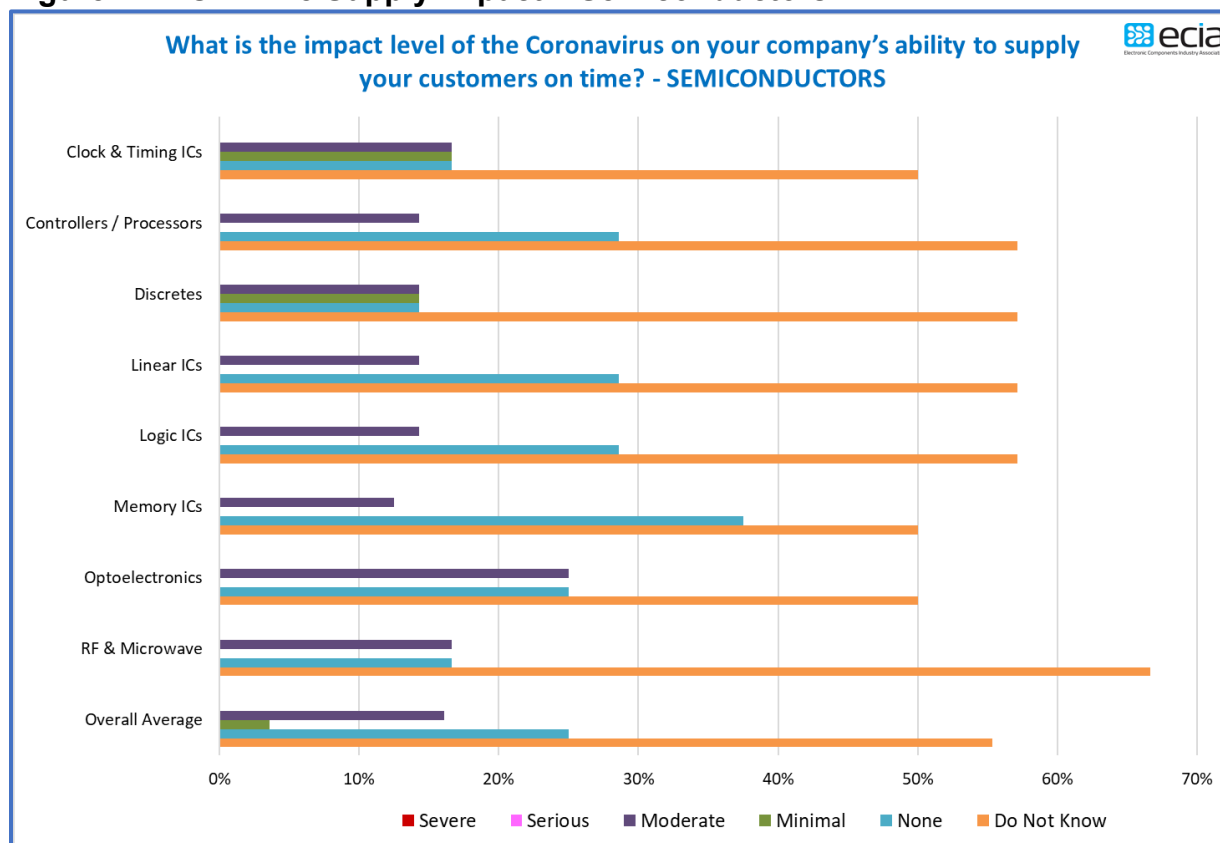
How much will the loss of supply in your markets due to Coronavirus increase overall lead times (not just for your company)?

COMPONENT	None	Less than 1 Week	More than 1 Week; Less than 2 Weeks	More than 2 Weeks	No Visibility
Audio	29%	0%	0%	29%	43%
Capacitors	43%	0%	0%	29%	29%
Circuit Protection	17%	17%	0%	33%	33%
Rectangular	33%	0%	0%	17%	50%
Inductors	25%	13%	13%	38%	13%
Resistors	29%	0%	0%	43%	29%
Sensors	14%	14%	0%	43%	29%
Timing	25%	0%	0%	63%	13%
Transformers, Filters, Ferrite	25%	0%	13%	38%	25%
Overall Average	27%	5%	3%	38%	28%

Source: ECIA

Semiconductors Survey Results

Figure 11 – On Time Supply Impact – Semiconductors



Source: ECIA

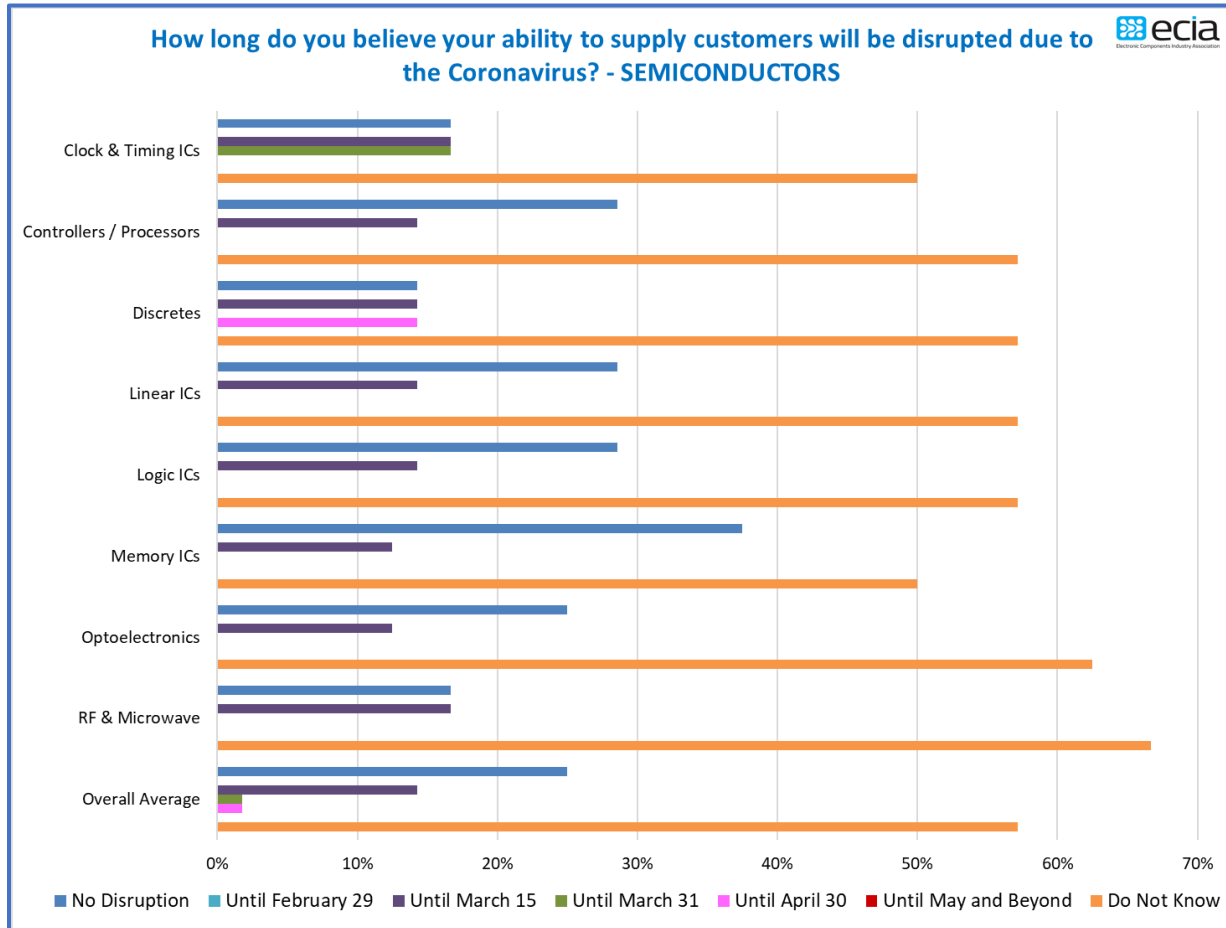
Table 7 – On Time Supply Impact – Semiconductors

What is the impact level of the Coronavirus on your company's ability to supply your customers on time?

COMPONENT	Severe	Serious	Moderate	Minimal	None	Do Not Know
Clock & Timing ICs	0%	0%	17%	17%	17%	50%
Controllers / Processors	0%	0%	14%	0%	29%	57%
Discretes	0%	0%	14%	14%	14%	57%
Linear ICs	0%	0%	14%	0%	29%	57%
Logic ICs	0%	0%	14%	0%	29%	57%
Memory ICs	0%	0%	13%	0%	38%	50%
Optoelectronics	0%	0%	25%	0%	25%	50%
RF & Microwave	0%	0%	17%	0%	17%	67%
Overall Average	0%	0%	16%	4%	25%	55%

Source: ECIA

Figure 12 –Supply Disruption Recovery – Semiconductors



Source: ECIA

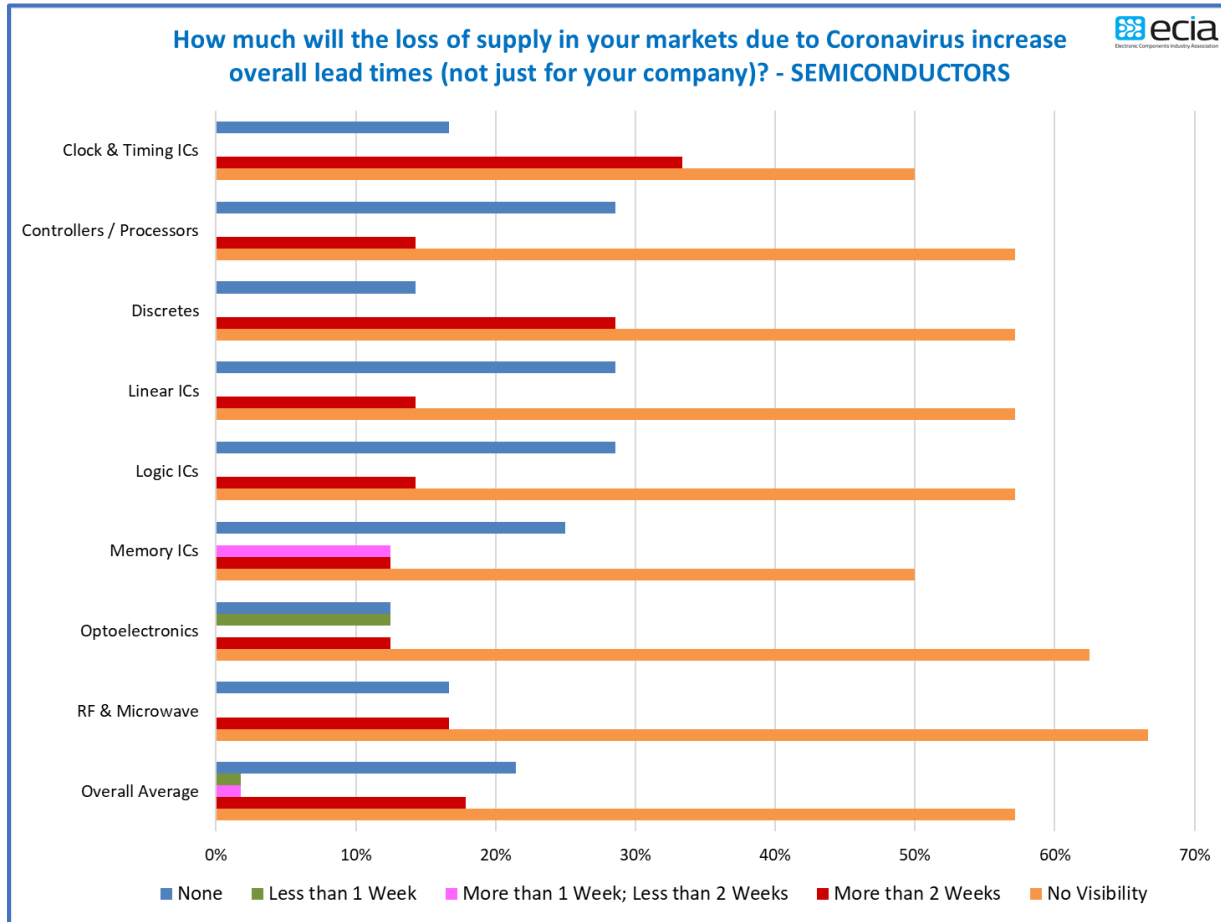
Table 8 –Supply Disruption Recovery – Semiconductors

How long do you believe your ability to supply customers will be disrupted due to the Coronavirus?

COMPONENT	Until February 29						Do Not Know
	No Disruption	Until February 29	Until March 15	Until March 31	Until April 30	Until May and Beyond	
Clock & Timing ICs	17%	0%	17%	17%	0%	0%	50%
Controllers / Processors	29%	0%	14%	0%	0%	0%	57%
Discretes	14%	0%	14%	0%	14%	0%	57%
Linear ICs	29%	0%	14%	0%	0%	0%	57%
Logic ICs	29%	0%	14%	0%	0%	0%	57%
Memory ICs	38%	0%	13%	0%	0%	0%	50%
Optoelectronics	25%	0%	13%	0%	0%	0%	63%
RF & Microwave	17%	0%	17%	0%	0%	0%	67%
Overall Average	25%	0%	14%	2%	2%	0%	57%

Source: ECIA

Figure 13 – Lead Time Impact Average – Semiconductors



Source: ECIA

Table 9 – Lead Time Impact Average – Semiconductors

How much will the loss of supply in your markets due to Coronavirus increase overall lead times (not just for your company)?

COMPONENT	None	Less than 1 Week	More than 1 Week; Less than 2 Weeks	More than 2 Weeks	No Visibility
Clock & Timing ICs	17%	0%	0%	33%	50%
Controllers / Processors	29%	0%	0%	14%	57%
Discretes	14%	0%	0%	29%	57%
Linear ICs	29%	0%	0%	14%	57%
Logic ICs	29%	0%	0%	14%	57%
Memory ICs	25%	0%	13%	13%	50%
Optoelectronics	13%	13%	0%	13%	63%
RF & Microwave	17%	0%	0%	17%	67%
Overall Average	21%	2%	2%	18%	57%

Source: ECIA