FEBRUARY 2021

UPDATE - CURRENT STATUS OF THE PRICE AND DELIVERY SITUATION

MEETING THE CHALLENGES TOGETHER

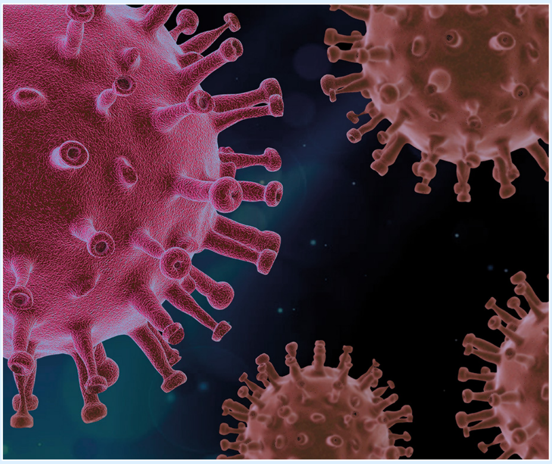
Dear Business Partners,

In October 2020 we informed you about the mounting supply shortages in the semiconductor market. Now it is February 2021 and we can clearly see, based among other things on official statements reaching us from our suppliers, that the situation is far from having reached its peak. Wafer manufacturers worldwide can no longer cope with the constantly growing demand, and production capacities of a few large chip manufacturers are already reserved for the entire year 2021. As a result, TSMC's resources, for example, are already nearly 100% booked for 2021, and that's just one example of many.

What impact does this have on our business?

All sectors of the semiconductor industry are now affected by this development, including display and touch technologies. Whereas three months ago delivery times were still at 16-20 weeks, we now have to assume that they will continue to rise.

Like last October, we can only continue to appeal to you: the only chance to meet demand and thus production goals is, if we work together on long-term planning. Orders placed at short notice will be difficult to fulfill on time, so we'd recommend placing demands at least four months in advance. You, as our customer, and we, as your distributor, need to work as closely as possible with our manufacturers to best accommodate the situation. Orders that have already been placed may also be affected. For the existing backlog, we are working closely with the wafer suppliers.



What you should do now:

- Provide us with an accurate forecast of your demand, allowing for possible spikes.
- Please allocate your existing blanket orders as early as possible.
- Try to plan your requirements long term and place firm call-off orders which we can feed into our manufacturer's production and purchasing schedules.

In all probability, the price situation will also continue to worsen. We are regularly hearing about price increases. As far as we can, we will try to cushion these or mitigate them through appropriate negotiations with our manufacturers, but this is only possible to a certain extent. This may mean that prices, even for current blanket orders, might also have to be adjusted, to help secure available components and raw materials.

We look forward to your call or e-mail.

Your ACTRON-Team

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ACTRON

THE FACE OF YOUR PRODUCT

28.01.2021

STATUS OF THE PRICE AND DELIVERY SITUATION

MANUFACTURER	ALLOCATION	PRODUCT/TECHNOLOGY	CURRENT DELIVERY TIMES	PREISE
Yeebo Display Ltd.	no	TFT/LCD	depending on the number of pieces	increasing
Powertip Powertip Technology Corp.	no	TFT	min. 20 weeks, tendency: increasing	rapidly increasing
Salt International Corp.	no	Touch	min. 12-16 weeks, tendency: increasing	increasing
Nely Co. LTD	no	Monochrome Displays	min. 12 weeks	increasing
Powertip Powertip Technology Corp.	no	Monochrome Displays	min. 12 weeks	increasing
Wha Lee Industrial Corp.	no	TFT	min. 12 weeks	rapidly increasing
WiseChip Semiconductor Inc.	no	OLED	min. 20-30 weeks	solid
NVD NewVisionDisplay	no	TFT	min. 22 weeks, tendency: increasing	solid
GOOD DISPLAY CO.	no	E-Paper	min. 12-16 weeks, tendency: increasing	solid

FROM NOW ON, WE WILL INFORM YOU ON OUR HOMEPAGE ABOUT THE LATEST INFORMATION FROM OUR MANUFACTURERS REGARDING THE INCREASING PRICE AND DELIVERY TIMES.

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