



February 18, 2026

Subject: Supply Chain Update and Planning Alignment

Dear Valued Customer and Partner,

We are writing to provide a proactive update on current semiconductor market conditions and to ensure continued alignment as we work together to protect your supply continuity.

Global semiconductor supply is becoming more constrained, with extending lead times and rising input costs. To maintain uninterrupted production, clear visibility into your demand and proactive planning are essential.

We recommend the following to mitigate supply risk to your business:

- Provide firm order coverage aligned to published lead times
- Maintain a minimum on-hand buffer of 12 weeks
- Share rolling full-year forecasts with your NXP team.

NXP is committed to supporting your business. We continue to monitor global supply chains, maintain appropriate inventory levels, and provide transparent forecasts to secure capacity and materials. We are also investing in expanded manufacturing capabilities through long-term foundry partnerships and strategic joint ventures. Despite these efforts, certain challenges, such as late orders placed within manufacturing cycle times and shortages of critical raw materials, cannot be fully offset.

Close, timely communication remains critical. We value our partnership and will continue to provide clear updates as conditions evolve.

Best regards,
NXP Semiconductors