

Syslogic AG, Taefernstrasse 28, CH-5405 Baden-Daettwil

To our customers

5405 Baden-Daettwil, 17. September 2026

Electronics Supply Update: Impact on Lead Times - Order now

Dear clients

Since our customer update in March 2026, shortages of electronic components have intensified significantly. What started as a shortage of memory and other critical semiconductor components has now developed into a broader electronics supply-chain crisis.

Availability constraints increasingly affect a broad range of electronic components, including memory, high-performance computing components, semiconductors, passive components and PCBs. At the same time, lead times continue to increase and prices remain highly volatile.

The challenge is no longer limited to longer lead times and higher costs. **Obtaining the components needed for production is itself becoming increasingly difficult.**

How Syslogic is responding

We are taking several measures to reduce the impact on our customers:

- **Advance orders:** We order critical components well ahead of production needs to secure available capacity.
- **Buffer stock:** Where possible, we are building additional inventory of strategically important components.
- **Closer supplier coordination:** Our purchasing team continuously monitors availability, lead times and pricing and maintains close contact with key suppliers.
- **Alternative components:** Where technically feasible, we evaluate alternative components and suppliers to reduce dependency on individual sources.
- **Demand planning:** We align procurement closely with customer forecasts, orders and upcoming project demand to identify material needs early.

These measures improve our ability to secure material, but they cannot fully compensate for the current market-wide constraints.

Current lead times

Effective immediately, our standard lead times for small and medium-sized order quantities are:

NVIDIA-based embedded computers: 30 weeks; Intel-based embedded computers: 50 weeks

These lead times may increase further in the coming weeks. Actual delivery dates remain subject to material availability and order-specific confirmation.

Action required

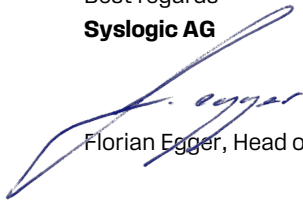
Please place your orders for upcoming demand now and coordinate quantities and requested delivery dates with your Syslogic sales contact.

Early ordering gives us more time to secure the necessary components and improves the chances of supply. However, it does not guarantee delivery in 2027 or 2028. Any further delay increases the risk that products cannot be supplied when needed.

We will continue to monitor the situation closely and take all reasonable measures to secure supply for our customers.

Best regards

Syslogic AG

A handwritten signature in blue ink, appearing to read 'F. Egger', is written over the printed name.

Florian Egger, Head of Sales