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May 23, 2025

Subject: China Export License Requirements – Supply Impact & Next Steps

To our valued customers:

On April 4, 2025, the Ministry of Commerce of the People's Republic of China announced the implementation of a mandatory export licensing process for items classified as sensitive or dual-use technologies, including those containing rare-earth metals. This regulation applies to all relevant exports from China and is expected to have a broad impact across global supply chains.

These new and unforeseen export restrictions (the "Constraints") have caused and will continue to cause unforeseeable delays in delivery of products shipped from China. Littelfuse is and has been diligent in exercising all reasonable efforts to deliver customer shipments on time. Littelfuse and its suppliers have already submitted the required export license application for the affected product lines. The officially stated processing time is up to 45 working days, but we have been informed that it is likely to be longer, and it is important to note that a positive decision is not guaranteed.

In parallel with our license application, we are conducting an active second-source evaluation to diversify our supply chain and minimize long-term risks.

Despite our early action, the Constraints threaten on-time delivery of our customers' orders. Despite our diligent efforts, the severity of the Constraints and lack of information on when they may be resolved have frustrated the fundamental purpose of Littelfuse's orders and rendered Littelfuse's full, timely performance of its orders impossible and commercially impracticable. Additionally, the Constraints constitute a Force Majeure under all applicable orders and agreements between Littelfuse and its customers.

Accordingly, Littelfuse reserves all its rights and remedies under all applicable orders and agreements and under applicable law. Littelfuse shall not be responsible for any costs or charges related to the delays caused by the Constraints. Any penalties for late deliveries of products impacted by the Constraints during the period of this declaration, including without limitation any "line down" charges are expressly disclaimed, and any attempts to setoff such penalties against amounts due to Littelfuse may result in accounts being placed on credit hold. This declaration applies to all existing and future orders until the impossibility/impracticability/Force Majeure no longer exists.

The existence of an impossibility, impracticability, and/or Force Majeure is temporary. It does not necessarily mean that Littelfuse will be unable to deliver any product at all, nor does it mean that Littelfuse intends not to fulfill its orders. Rather, it means that our ability to meet scheduled delivery dates will be restricted until such time as any required licenses are issued or an alternative source can be qualified.

We will continue to keep you informed as new information becomes available, both regarding the status of the license and our sourcing efforts. If you have questions or need support with planning, please do not hesitate to contact us.

We appreciate your cooperation.

Bruno Prevot

VP Business, General Manager
Electronics Business Unit, Switch & Magnetic Sensor
Littelfuse, Inc

A handwritten signature in black ink, appearing to be 'B. Prevot', with a stylized 'B' and a horizontal line through it.

Best regards,