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To Whom It May Concern

Kremsmünster, 6 March 2026

Customer Information: Impact of the Middle East Situation on Supply and Pricing

Dear valued partner,

We would like to update you on the current situation in the Middle East and its effects on global raw material and logistics markets. Our goal is to provide you with transparent and timely information about any potential implications for your supply chain.

At present, our raw material volumes with European suppliers remain stable, and we do not expect interruption to your deliveries. We are closely monitoring the situation and have taken proactive measures together with our key suppliers to safeguard supply availability.

The restrictions on shipping activity in the Strait of Hormuz are contributing to rising freight and insurance costs as well as longer transit times, particularly for goods originating from the Middle East and parts of Asia. While these developments do not currently affect our ability to supply you, they are increasing market volatility on a global scale.

In addition, the combination of logistical constraints, higher crude prices and elevated energy costs is putting upward pressure on polymer prices across all major material groups. Energy and freight costs are also trending upward, which means that price adjustments may become necessary depending on further market movements.

For customers located in the affected region, please note that the closure of the Strait of Hormuz has significantly limited the ability to transport shipping containers to destination ports. As a result, certain containers scheduled for current deliveries have been impacted. Furthermore, several shipping lines have suspended vessel loading to the region, adding further complexity to supply arrangements.

Air freight options are also currently constrained due to airport restrictions and substantially higher transportation costs. Our Commercial Operations teams remain available to provide real-time shipment updates and will continue to keep you informed of the latest developments across both sea and air freight logistics.

We remain in continuous dialogue with our suppliers, logistics partners and market analysts to mitigate impacts wherever possible, and we will keep you proactively informed should relevant changes occur.

Thank you for your trust and for the continued partnership.

Best regards



Wilfried Stock

Vice President Global Commercial Operations and IKAM