



24 OCTOBER 2024 MEMO

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### **Boeing Order Updates - Supplier Communications**

As TRIUMPH has communicated, we continue to follow the Boeing Strike situation and with yesterday's rejection of Boeing's latest contract proposal to the IAM Union, the impacts will continue to affect both our supply chain and operational planning for FY25. Boeing has announced 10% reduction in staffing and further delays to the 777X platform, as well as a predicted delay to the 787 ramp rates.

TRIUMPH have already sent the 30-day extensions to impacted suppliers on the Boeing 737, 767, 777 and 777X programs and this remains in place until you are notified via Purchase Order updates. We will continue to evaluate our order book as we understand the impact of the prolonged strike and await further notifications from Boeing.

While TRIUMPH work to provide reschedules and required deferrals where appropriate, we are also adjusting production rates with several customers, and we are looking for continued support from the supply base in adhering to our demand signals. This demand realignment is a necessary step to level load our operational planning which will result in more predictable operating rhythm for our supplier partners.

Additionally, we require our suppliers to adhere to TRIUMPH's shipping guidelines, which include accepting shipments within a tight shipping window, typically seven (7) days earlier than the PO due date for most of our sites. We have seen a growing number of early receipts this year, some more than 14-29 days earlier than PO need dates, which we will not be able to accept as we look to optimize our annual operating plan for the balance of our fiscal year. Early shipments outside the early shipment window will only be accepted by exception after coordination with your Purchasing representative

We ask suppliers to continue to review compliance to long term agreements with sufficient buffer/safety stock levels, as well as exploring innovative distribution and stocking solutions.

Thank you for your continued partnership as we work through this period of uneven demand together.

A handwritten signature in blue ink that reads "Michael Boland".

Michael Boland  
Chief Operating Officer