UNITED STATES
SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

FORM 8-K

CURRENT REPORT
Pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934

Date of Report (Date of earliest event reported): June 27, 2025

Navitas Semiconductor Corporation

(Exact name of registrant as specified in its charter)

Delaware	**001-39755**	**85-2560226**
(State or other jurisdiction of incorporation)	(Commission File Number)	(IRS Employer Identification No.)

3520 Challenger Street, Torrance, California	**90503-1640**
(Address of principal executive offices)	(Zip Code)

Registrant's telephone number, including area code: **(844) 654-2642**

Check the appropriate box below if the Form 8-K filing is intended to simultaneously satisfy the filing obligations of the registrant under any of the following provisions:

☐ Written communications pursuant to Rule 425 under the Securities Act (17 CFR 230.425)
☐ Soliciting material pursuant to Rule 14a-12 under the Exchange Act (17 CFR 240.14a-12)
☐ Pre-commencement communications pursuant to Rule 14d-2(b) under the Exchange Act (17 CFR 240.14d-2(b))
☐ Pre-commencement communications pursuant to Rule 13e-4(c) under the Exchange Act (17 CFR 240.13e-4(c))

Securities registered pursuant to Section 12(b) of the Act:

Title of each class	Trading Symbol(s)	Name of each exchange on which registered
Class A Common Stock, par value $0.0001 per share	**NVTS**	**The Nasdaq Stock Market LLC**

Indicate by check mark whether the registrant is an emerging growth company as defined in Rule 405 of the Securities Act of 1933 (§230.405 of this chapter) or Rule 12b-2 of the Securities Exchange Act of 1934 (§240.12b-2 of this chapter).
Emerging growth company ☐

If an emerging growth company, indicate by check mark if the registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act. ☐

Item 7.01. Regulation FD Disclosure.

Navitas Semiconductor Corporation ("Navitas" or the "Company") will continue plans to diversify its sources of gallium nitride (GaN) wafers after being informed that Taiwan Semiconductor Manufacturing Company Limited ("TSMC"), the Company's sole source of GaN wafers, will end GaN production in July 2027. On July 1, 2025, Navitas announced developments in its ongoing collaboration for GaN wafer production with Powerchip Semiconductor Manufacturing Corporation ("PSMC" or "Powerchip"), with qualification of initial devices expected in the fourth quarter of 2025 and initial mass production of 100 V GaN products expected in the first half of 2026. Navitas expects to complete the transition of 650 V GaN devices from TSMC to Powerchip over the next approximately 12-24 months. The Company is engaged in identifying and qualifying additional potential suppliers and expects these plans will diversify its supply chain and enhance operational flexibility.

The press release announcing developments in the Company's collaboration with Powerchip is included as Exhibit 99.1 to this report and incorporated in this Item 7.01 by reference.

The information in this report, including Exhibit 99.1, is being furnished pursuant to Item 7.01 of Form 8-K and shall not be deemed "filed" for purposes of Section 18 of the Securities Exchange Act of 1934, as amended, or otherwise subject to the liabilities of that section. The information in this Item 7.01 shall not be incorporated by reference into any filing under the Securities Act of 1933 or the Securities Exchange Act of 1934, except as expressly set forth by specific reference in such a filing.

Forward-Looking Statements

Statements and information in this report that are not historical are forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995 and are made pursuant to the "safe harbor" provisions of such Act. Forward-looking statements may be identified by the use of words such as "we expect" or "are expected to be," "estimate," "plan," "project," "forecast," "intend," "anticipate," "believe," "seek," or other similar expressions that predict or indicate future events or trends or that are not statements of historical matters. Forward-looking statements are provided for illustrative purposes only and are not intended to serve as, and must not be relied on by any investor as, a guarantee, an assurance, a prediction or a definitive statement of fact or probability. Actual events and circumstances are difficult or impossible to predict and will differ from assumptions and expectations. The risks, uncertainties, assumptions and other factors that could cause actual events or results to differ from the events or results predicted or implied by our forward-looking statement include those risk factors discussed in our filings with the SEC, including those disclosed under the caption "Risk Factors" in our annual report on Form 10-K for the year ended December 31, 2024 and subsequent quarterly reports. Navitas may elect to update these forward-looking statements at some point in the future, but specifically disclaims any obligation to do so.

Item 9.01. Financial Statements and Exhibits.

(d) Exhibits.

Exhibit Number	Description
99.1	Press release dated July 1, 2025
104	Cover Page Interactive Data File (embedded within the Inline XBRL document)

SIGNATURES

Pursuant to the requirements of the Securities Exchange Act of 1934, the registrant has duly caused this report to be signed on its behalf by the undersigned hereunto duly authorized.

NAVITAS SEMICONDUCTOR CORPORATION

Dated: July 1, 2025

By: /s/ Gene Sheridan
Gene Sheridan
President and Chief Executive Officer

Navitas Announces Plans for 200mm GaN Production with PSMC

Next-phase strategy expected to strengthen supply chain, drive innovation, and improve cost efficiency—supporting GaN's ramp into AI data centers, EVs, solar, and home appliances.

TORRANCE, Calif., July 01, 2025 — Navitas Semiconductor (Nasdaq: NVTS), the industry leader in next-generation GaNFast™ gallium nitride (GaN) and GeneSiC™ silicon carbide (SiC) power semiconductors, today announced a strategic partnership with Powerchip Semiconductor Manufacturing Corporation (PSMC or Powerchip), to start production and continue development of best-in-class 200mm GaN-on-silicon technology.

Navitas' GaN IC portfolio is expected to use Powerchip's 200mm in Fab 8B, located in Hsinchu, Taiwan. The fab has been operational since 2019 and supports various high-volume manufacturing processes for GaN, ranging from micro-LEDs to RF GaN devices.

Powerchip's capabilities include an improved 180nm CMOS process, offering smaller and more advanced geometries, which bring improvements in performance, power efficiency, integration, and cost. "200mm GaN-on-silicon production on a 180nm process node enables us to continue innovating higher power density, faster, and more efficient devices while simultaneously improving cost, scale, and manufacturing yields", said Dr. Sid Sundaresan, SVP of WBG Technology Platforms at Navitas.

Powerchip is expected to manufacture Navitas' GaN portfolio with voltage ratings from 100V to 650V, supporting the growing demand for GaN for 48V infrastructure, including hyper-scale AI data centers and EVs. Qualification of initial devices is expected in Q4 2025. The 100V family is expected to start production first at Powerchip in 1H26, while the company expects 650V devices will transition from Navitas' existing supplier, TSMC, to Powerchip over the next 12-24 months.

Navitas recently made several announcements in the AI data center, EV, and solar markets, including its collaboration with NVIDIA to support GaN and SiC technologies for 800V HVDC architectures for 1 MW IT racks and beyond. Enphase announced that its next-generation IQ9 would include Navitas' 650 V bi-directional GaNFast ICs, and Changan Automobile announced its first commercial GaN-based OBC (on-board charger) using Navitas' GaNSafe technology.

"We are proud to partner with Powerchip to advance high-volume 200 mm GaN-on-silicon production and look forward to driving continued innovation together in the years ahead," said Gene Sheridan, CEO and co-founder of Navitas. "Through our partnership with Powerchip, we are well-positioned to drive sustained progress in product performance, technological evolution, and cost efficiency."

"Powerchip has collaborated with Navitas on GaN-on-Si technology for years, and we're thrilled to announce that product qualification is nearly complete - bringing us to the verge of mass production", said Martin Chu, President and Director at Powerchip. "Building on this strong partnership, Powerchip is committed to expanding our cooperation and continuously supporting Navitas in exploring and growing the GaN market."

About Powerchip Semiconductor Manufacturing Corporation

Powerchip Semiconductor Manufacturing Corporation (PSMC) is a Taiwanese semiconductor foundry that develops, manufactures, and distributes advanced memory components and other integrated

circuits. Founded in 1994, PSMC operates multiple 12-inch and 8-inch wafer fabs, offering foundry services, design, manufacturing, and testing services. They are recognized for their expertise in developing and manufacturing a range of semiconductor products, including power integrated circuits, discrete components, and image sensors.

About Navitas

Navitas Semiconductor (Nasdaq: NVTS) is the only pure-play, next-generation power-semiconductor company, celebrating 10 years of power innovation, founded in 2014. GaNFast™ power ICs integrate gallium nitride (GaN) power and drive, with control, sensing, and protection to enable faster charging, higher power density, and greater energy savings. Complementary GeneSiC™ power devices are optimized high-power, high-voltage, and high-reliability silicon carbide (SiC) solutions. Focus markets include AI data centers, EV, solar, energy storage, home appliance / industrial, mobile, and consumer. Over 300 Navitas patents are issued or pending, with the industry's first and only 20-year GaNFast warranty. Navitas was the world's first semiconductor company to be CarbonNeutral®-certified.

Forward-Looking Statements

Statements and information in this press release that are not historical are forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995 and are made pursuant to the "safe harbor" provisions of such Act. Forward-looking statements may be identified by the use of words such as "we expect" or "are expected to be," "estimate," "plan," "project," "forecast," "intend," "anticipate," "believe," "seek," or other similar expressions that predict or indicate future events or trends or that are not statements of historical matters. Forward-looking statements are provided for illustrative purposes only and are not intended to serve as, and must not be relied on by any investor as, a guarantee, an assurance, a prediction or a definitive statement of fact or probability. Actual events and circumstances are difficult or impossible to predict and will differ from assumptions and expectations.

The risks, uncertainties, assumptions and other factors that could cause actual events or results to differ from the events or results predicted or implied by our forward-looking statement include those risk factors discussed in our filings with the SEC, including those disclosed under the caption "Risk Factors" in our annual report on Form 10-K for the year ended December 31, 2024, our quarterly report on Form 10-Q for the quarter ended March 31, 2025 and subsequent quarterly reports. Navitas may elect to update these forward-looking statements at some point in the future, but specifically disclaims any obligation to do so.

Contact Information

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