

Mobility Solutions

Each sector shapes the future, much like the instruments in an orchestra.

Mobility solutions, like the steady rhythm of drums, leads global smart transportation with seamless systems. It is innovation and our global reach that will drive mobility forward.



Every 2 Seconds

1 Tire Production

830,000

Vehicles Tracked by Arvento

68%

FX Revenue Share

24

Models of Commercial Vehicle Production

Mobility Solutions

One of the cornerstones of Sabancı Holding's broad vision, Mobility Solutions brings together commercial vehicle and tire manufacturing and mobility services.

100%
Brisa's Mobility Solutions revenue grew 100% in USD terms in four years.

Temsa increased its commercial vehicle export revenues **3.5-fold** in USD terms in five years.

Sabancı Holding's Mobility Solutions Strategic Business Unit (SBU) is shaping the future of mobility, driven by a vision of commercialized innovation, sustainability, and operational excellence. A key pillar of Sabancı Holding's broader vision, the Mobility Solutions SBU integrates commercial vehicles and tire production and mobility solutions. This comprehensive approach drives scalable and digital advancements within the global mobility landscape. Represented by Brisa, the Sabancı Group's tire company, and Temsa, its commercial vehicles company, Sabancı Holding strengthens its position as a leader in sustainable end-to-end mobility solutions.

2024 Highlights

In 2024, geopolitical tensions and macroeconomic uncertainties shaped global and local markets, creating both challenges and opportunities for growth and innovation. Against this backdrop, Sabancı Holding the Mobility Solutions SBU showed remarkable results by leveraging its strategic agility and strong operational performance. Over 45% of the Mobility Solutions SBU's total revenue originates from foreign currency generated across 80 countries.

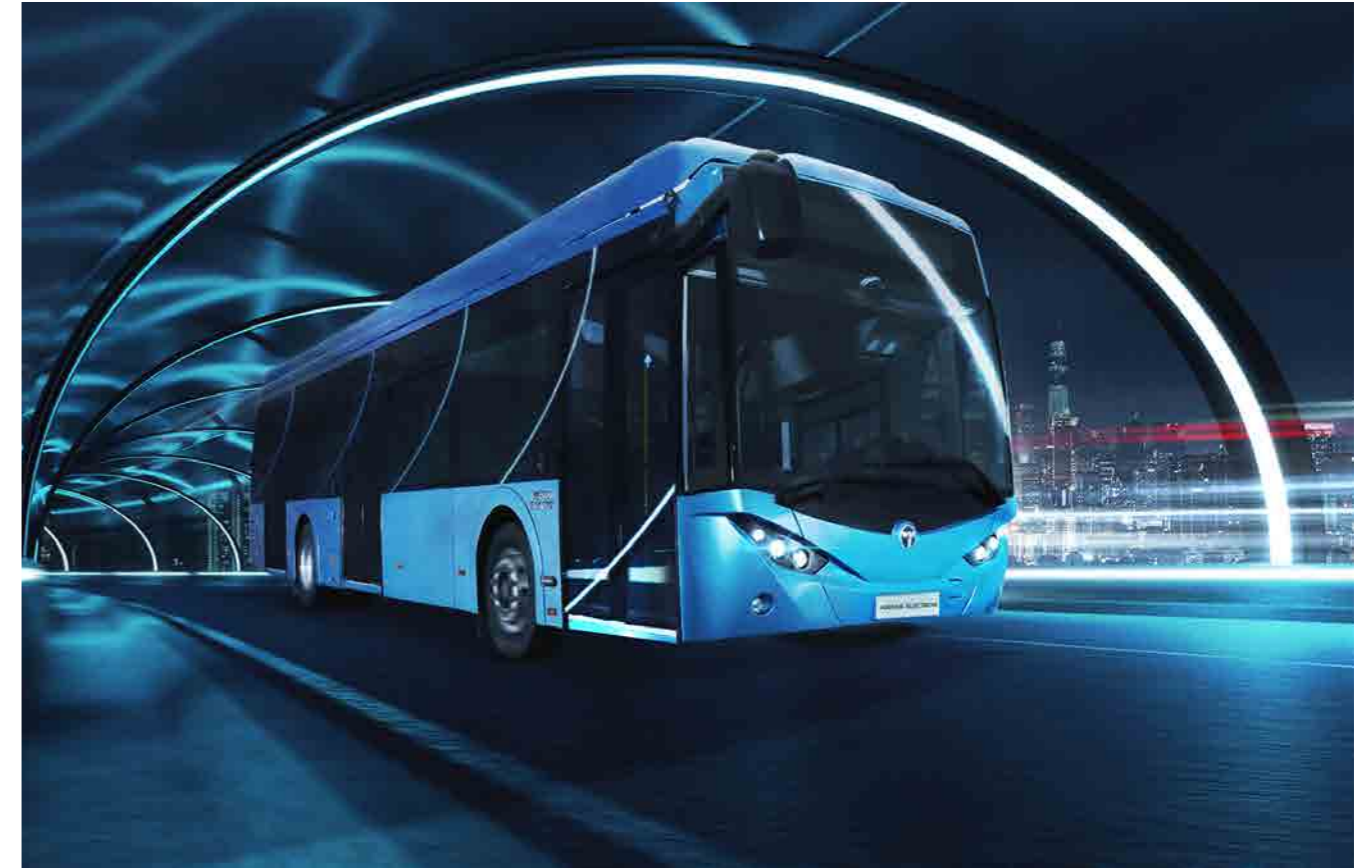
The Mobility Solutions SBU delivered historically strong financial results in commercial vehicles this reporting year. The SBU also expanded its international reach and improved new energy vehicle (NEV) capabilities. Temsa increased its commercial vehicle export revenues 3.5-fold in USD terms in five years.

In North America, Temsa achieved a notable market share of 16% in the private coach segment, while ranking third in Spain's coach market. This growth resulted in prestigious accolades recognizing the company's strong performance.

Temsa's ability to secure strategic financing and invest in transformative initiatives further demonstrated operational strength. Temsa continued to excel in operational efficiency, achieving top margins among benchmark global commercial vehicle manufacturers.

In tire and mobility services, the Mobility Solutions SBU remained the tire sector leader in Türkiye and key export markets. Brisa maintained market share leadership in a contracting tire market while achieving growth in the consumer and commercial replacement segments. Despite this challenging market environment, demand for high-performance tires remained strong and Brisa was effectively positioned to meet the demand for high-performance tires. With substantial export growth and operations spanning over 70 markets, the SBU's tire company deftly navigated geopolitical challenges, further solidifying its position as a global industry player.

Brisa's focus on premium products drove growth in key segments, with high-performance tire sales reaching a record-breaking 20% of total revenue. The company's financial performance reflected improved cash management and lower debt compared to local competitors.



Driving Growth through Commercialized Innovation and Strong International Network

In 2024, the Mobility Solutions SBU prioritized commercializing innovation to meet evolving customer needs. In commercial vehicles, leveraging its strengthened international network, the SBU advanced its electric bus strategy by providing 11 zero-emission models – nine electric and two hydrogen-powered – to the US, France, Sweden, and other major European markets. The SBU's commercial vehicle company achieved notable North American market share in this highly competitive market. Building on this momentum, Temsa increased its vehicle presence in France to 6,000 units, making the country the largest market for Temsa-branded vehicles outside Türkiye. The eQuad, a micromobility vehicle developed with Fernhay Solutions, showcased Temsa's forward-looking approach to urban transport and last mile solutions.

Launching over 148 new products, the Mobility Solutions SBU's tire company advances next generation, high-technology tires in its R&D center. Brisa's sustainable EV-compatible tires, Bridgestone Enliten and Lassa Revola, have seen strong market adoption. Otopratik and Propratik service points – leading domestic fast-service brands serving over 1 million vehicles across 149 locations in 58 cities in Türkiye – provide EV charging services via 72 stations in 36 cities. These offerings demonstrate Brisa's leadership in addressing emerging trends like EV adoption and sustainability.

Sustainable Mobility for a Greener Future

The Mobility Solutions SBU's commercial vehicles company broadened its sustainability focus beyond traditional mobility. The Avenue EV bus – Türkiye's first domestically produced electric bus – exemplified the company's dedication to innovation and sustainability in public transportation. With the Marine Electrification project, Temsa electrified Istanbul's hybrid sea taxis, while the Agricultural Battery initiative developed specialized battery packs for tractors, reducing agricultural diesel consumption. These projects demonstrate Temsa's commitment to leveraging electrification for environmental and economic value across diverse sectors. The SBU's tire company furthered its decarbonization efforts by adding solar energy capacity to its advanced Aksaray facility, moving toward 100% renewable energy use. Brisa also launched its domestically produced retreading brand, addressing a significant market need in circular economy and driving substantial growth in retreading volume across 20 facilities.

Mobility Solutions

Digitalization, sustainability and scalable growth remained central to 2024 strategy of the Mobility Solutions SBU.



The Mobility Solutions SBU's sustainability leadership garnered global recognition in 2024. Brisa received a prestigious "A List" ranking in both Climate Change and Water Security under the Carbon Disclosure Project (CDP), the only global tire company to achieve this distinction. Temsa also secured an "A List" ranking for Climate Change and Supplier Engagement Ratings (SER) in the 2023 CDP evaluations. These accolades affirm the SBU's unwavering commitment to global sustainability standards and leadership in climate action.

Investing in Digital Solutions for Enhanced Mobility Experiences

The Mobility Solutions SBU's scalable approach was evident in its battery technology capabilities. From marine electrification to refrigeration, Temsa's battery management systems have demonstrated versatility and innovation. The company also secured a club loan for growth, technology, and sustainability projects, underscoring its financial commitment to long-term scalability and exited from Financial Restructuring Agreement signed in 2020.



Digitalization, sustainability and scalable growth remained central to 2024 strategy of the Mobility Solutions SBU. During the year, the SBU enhanced digital capabilities through Arvento's advanced telematics, now tracking over 830,000 vehicles and providing predictive analytics via Bluetooth Low Energy sensors for commercial vehicles. Brisa combined digital solutions with tire and fleet services to create seamless, integrated mobility experiences. Separately, Brisa participated in the EU's Digital Europe cybersecurity program, enhancing its Industry 4.0 capabilities in manufacturing.

Shaping the Future of Mobility

The Mobility Solutions SBU aims to advance its vision of integrated mobility solutions and become a new energy vehicle manufacturing hub by growing and transforming.

The SBU plans to expand its high-performance and EV-compatible tire portfolio while further investing in scalable, digital, and sustainable initiatives, such as Arvento, retreading, and fast-fit services. The tire company will focus on emerging markets to drive growth and bolster its global position.

Building on its success in bus and light truck manufacturing and advanced battery technologies, the Mobility Solutions SBU aims to explore new collaborative business models to support its modular manufacturing hub ambition. Leveraging existing competencies and expanding into transformative areas, Temsa is strategically positioned to lead mobility electrification.

Sabancı Holding's Mobility Solutions SBU remains at the forefront of the global mobility industry. Embracing digital transformation and fostering scalable growth, the SBU is poised to shape the future of mobility, creating stakeholder value, and setting new industry benchmarks.