

DATE PLACEHOLDER

WE REINFORCE LIFE



Corporate Presentation

Presentation Title
Placeholder

Sabancı Holding – Diversified with Market Leading Positions



BANKING AND FINANCIAL SERVICES



ENERGY AND CLIMATE TECHNOLOGIES



MATERIAL TECHNOLOGIES



MOBILITY SOLUTIONS



DIGITAL



RETAIL



OTHER



Our Strategic Evolution



From local producer to global leader in reinforcement solutions

1973

Local Foundation

Established as a local tire cord fabric producer in Türkiye

1986

Integrated Scale

Backward integration into yarn production and strategic joint ventures

2001

Global Expansion

International growth through acquisitions and broader production footprint

2007

Technology at Core

Global Innovation Centers

2013

Diversification to Composites

New business units in composites reinforcement supported by R&D

2018-2019

US Expansion

Acquisition of Fabric Development Inc., Textile Products Inc., and Axiom Materials Inc.

2022

EU Expansion

Acquisition of Microtex Composites S.r.l.

Moving Ahead

A global reinforcement company focused on high performing and sustainable materials.

We Reinforce Life



We Simplify, Prioritize and Focus

Our Characteristics

Integrity

Accountability

Adaptability

Our Values

Passion

Respect

Trust

Back to Basics

We simplify, prioritize and focus

Reinforce Fundamentals

- Reliable in customer commitments
- Flexible to customer demand
- Operationally efficient

Value Creation through Differentiation

- Accelerate new approvals
- Develop tailored offerings in collaboration with customers

Enhance Financial Resilience

- Sustainable profitability
- Strengthen the balance sheet

Execution Culture

Engaged People

Sustainable

Global Presence, Grounded Locally

A global manufacturing and materials technology network built close to customers



3900+
Employees

6
Countries

2
Technical Centers

4
Continents

2
R&D Centers



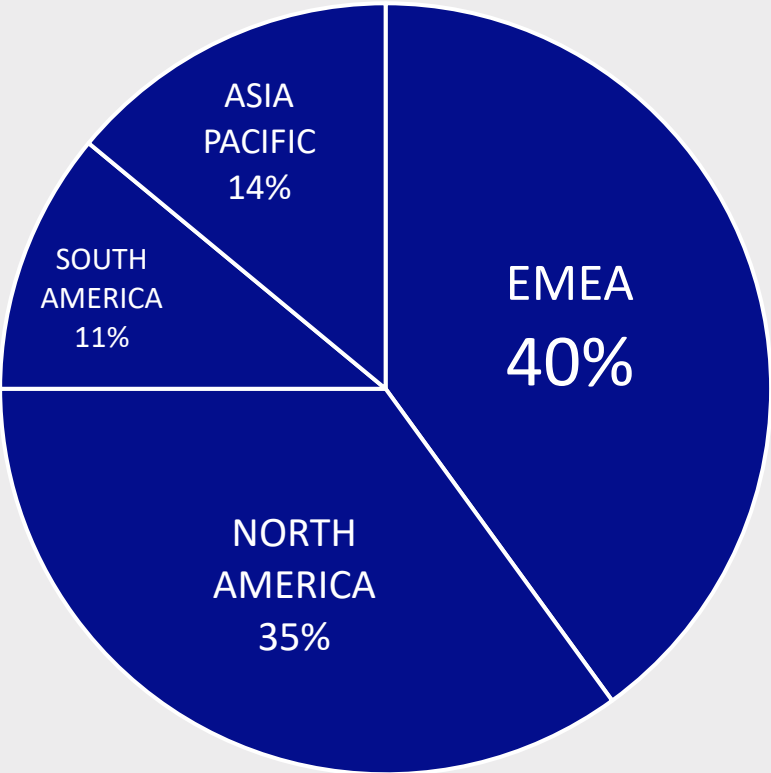
Financial Summary | 2025 Revenue Distribution (YE 2025)



Revenue Mix by Region and Business

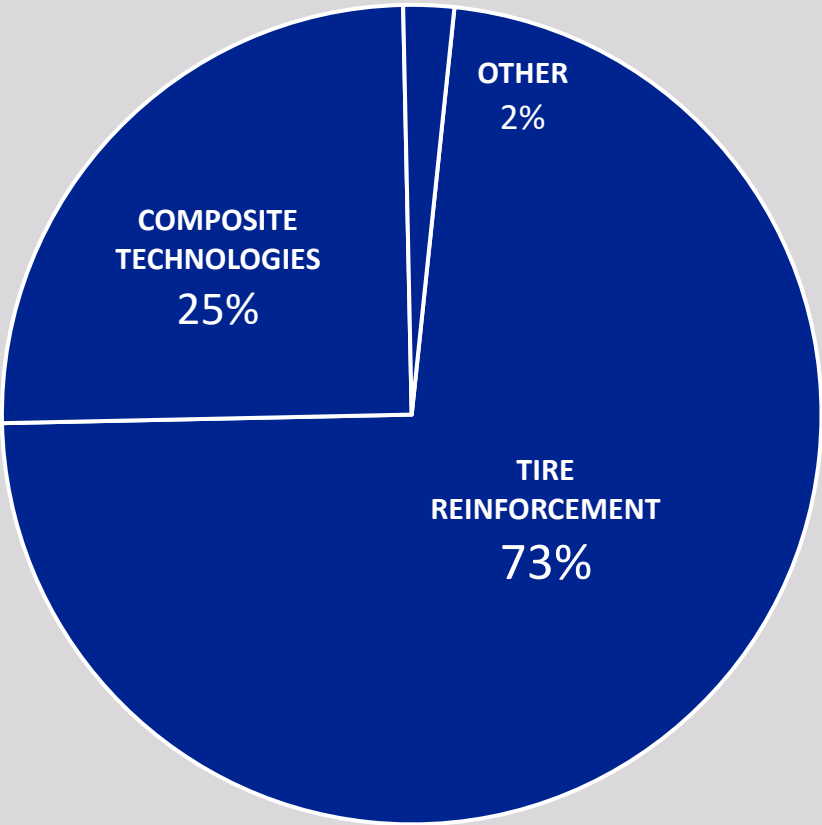
Diversified Geographic Revenue Base

Supporting long-term stability
across global markets



Balanced Business Portfolio

Reinforcement at the core,
composites driving growth



Technology & Innovation at Core

Where Reinforcement
Becomes Value

Global Innovation

90+

R&D Employees

1000+

Patent Applications

600+

Approved Patents

2008

**Kordsa – İzmit
R&D Center**

Tire reinforcement

2023

**Asia Pacific
Technical Center**

Tire reinforcement

2016

**Composite Technologies
Center of Excellence**

Composite technologies

2024

**Advanced Materials
Technical Center**

Composite technologies

KORDSA



The Architecture of Sustainable Impact



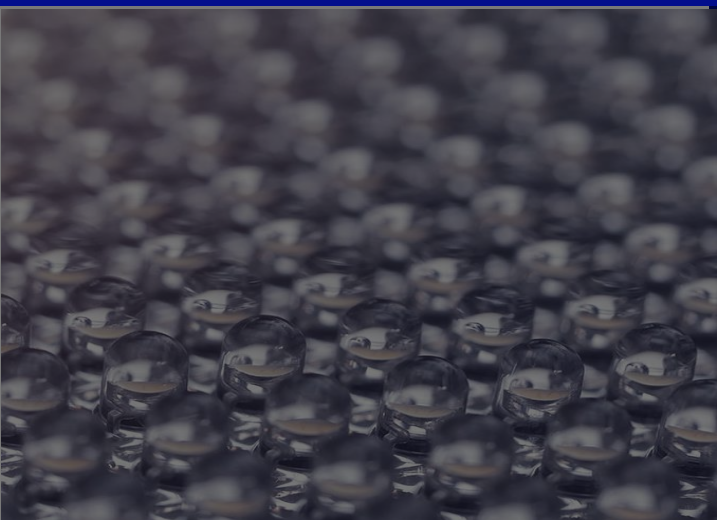
Tire Reinforcement

Lower tire rolling resistance for enhanced fuel economy and reduced emissions



Composite Reinforcement

Lightweight products to drive lower-carbon industrial outcomes



SCIENCE
BASED
TARGETS

DRIVING AMBITIOUS CORPORATE CLIMATE ACTION



ISCC+ Certified Plants:
Türkiye, Brazil, Indonesia

Sustainability Approach Driven by Measurable Targets

2030 Targets

46.2%

reduction in
Scope 1 and Scope 2 emissions

Base year: 2019

25%

reduction in
Scope 3 emissions

Base year: 2021

30%

reduction in
absolute water withdrawal

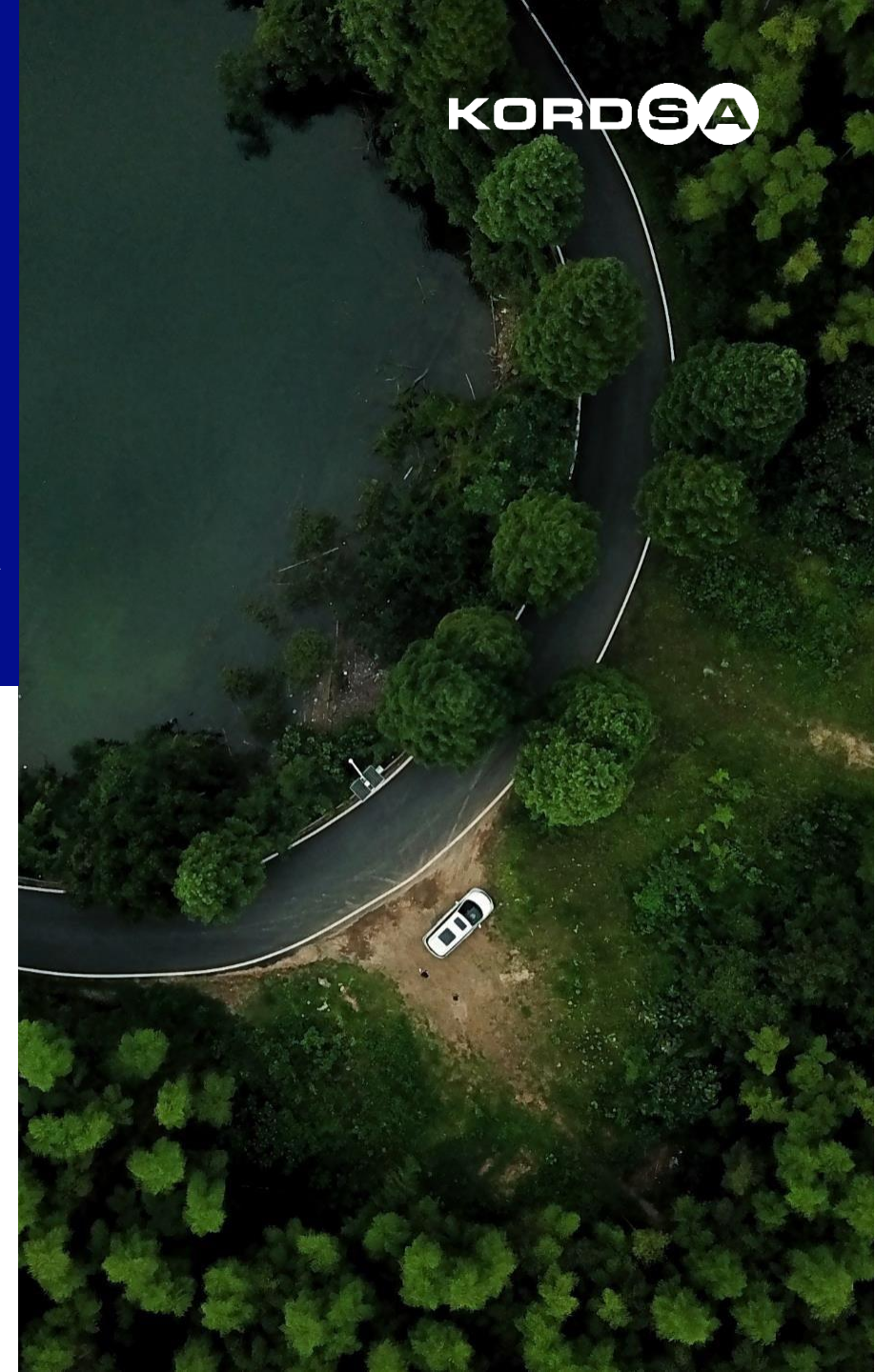
Base year: 2019

Core Pillars

- Business excellence
- Responsibility for people
- Innovation for sustainable materials

Key Commitments

- Net zero by 2050
- Science-based climate targets
- Responsible and ethical value chain



Tire Reinforcement

Global leader in the tire cord fabric market

How Tire Reinforcement Is Engineered



Textile reinforcements deliver performance, *safety*, and *durability* - *enabling next generation mobility*

MATERIAL LOGIC

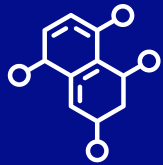
NYLON66

for cap ply

PET

for radial ply

From Raw
Materials to
Performance
Inside the Tire



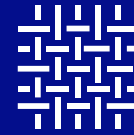
Polymers



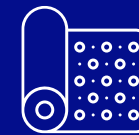
Yarn



**Twisted
Yarn**



**Woven
Fabric**



**Dipped
Fabric**



**Tire
Reinforcement**

This is how we turn polymers into
road-ready performance

Next-Gen Tire Reinforcement



NY66 Tire Cord

POSITION

Global **#1 Producer** & **#1 Supplier** for Aircraft Tire Textiles

USED FOR

Cap Ply & Specialty Tire Carcass Ply

ADDED VALUE

High Performance Solutions & Sustainable Nylon Using Recycled and Bio Based Materials

PET Tire Cord

POSITION

Global #3 with strength in Premium Segments

USED FOR

Carcass Ply in Radial Passenger Tires

ADDED VALUE

Next Generation PET for High Performance, Sustainable Polyester Using Recycled and Bio Based Materials

Hybrid Cord

POSITION

Technology & Market Leadership Through Proprietary Solutions

USED FOR

High Performance Tires & Smart Tires

ADDED VALUE

Product Expansion, Industry Partnerships & Licensing Models

Single End Cord

POSITION

Global Leader in the Automotive and Aircraft Tire Reinforcement Market

USED FOR

High Performance Tires & Mechanical Rubber Goods

ADDED VALUE

High-performance Single End cord Solutions Enabling Efficient Tire Manufacturing, Improved Structural Stability in Tires, and a Broad Product Portfolio Across Polyester, NY66, and Hybrid Materials

Smart Mobility - RFID

POSITION

Pioneering RFID Integration for Smart & Connected Tires

USED FOR

Embedded and Patch-Based Tire Identification, End-to-End Tracking from Production to End-of-Life

ADDED VALUE

Battery-Free RFID Applied Before Curing, Durable Tags for Extreme Conditions, Real-Time Visibility & Actionable Data Across the Tire Lifecycle

Reinforcing 1 of every 3 automobile tires, and 2 of every 3 aircraft tires



Differentiated Products



Single End Cord (SEC)



Hybrid Cord and Fabrics



Tire Cord Fabrics
for Aircraft Tires



Product Portfolio for
Electric Vehicle Tires



RFID (Enabler for the
Digital Product Passport)

Values Delivered



High durability



Material efficiency



Enhanced tire
safety



Digital tire
traceability

Composite Technologies

End-to-end customer solutions

Building a Global Composites Platform



2013



2016

Composite Technologies business unit established.

Composite Technologies Center of Excellence launched as a university and industry collaboration.



2018-2019

Aerospace market expansion with acquisition of Fabric Development Inc., Textile Products Inc., and Axiom Materials in the US.



2022

Acquisition of Microtex Composites S.r.l. in Italy expanded capabilities and strengthened automotive supply chain participation.

From Materials to Performance

Raw Materials



- Advanced Fibers
- Specialty Resins
- Structural Cores

Carbon, Aramid, Glass, Ceramics,
Thermoplastics, Thermosets,
Nomex

Engineered Intermediates



- Fabrics
- Prepregs & Resin Systems
- Honeycomb Cores and Face Sheets

Where Kordsa adds
engineering and IP

Composite Parts



- Aerospace
- Automotive & Mobility
- Industrial & Marine

Where customers
realize the value

Composite Technologies

End-to-end customer solutions



COMPOSITE TECHNOLOGIES
CENTER OF EXCELLENCE

A pioneering business model built on strong collaboration between academia and industry to research and address issues associated with composite product development and manufacturing.

An innovator in prepreg materials designed for out-of-autoclave curing, helping reduce emissions and energy use.



Over 50 years of experience in technical weaving including carbon fiber, aramids, ceramics, and quartz fabrics.

A leading supplier of advanced composite fabrics for the commercial aviation industry.

Manufactured the sponson (balloon) fabric for the Artemis mission, supporting the furthest-traveled crewed spacecraft to date.



More than 40 years of expertise in advanced technical fabric weaving. Serving diverse industries including Aviation, Aerospace, Automotive, Military, Infrastructure, Medical, and Ballistic markets.

Exclusive supplier of specialized lightning strike protection fabrics.



Established reputation for innovation and forward-thinking designs in specialty advanced composite solutions. Largest global producer of Ox-Ox Ceramic Matrix Composite materials on an industrial scale.

Experts in prepregs, adhesive films and honeycomb cores for high temperature and structural applications.



With textile roots that go back to the 1940s, Microtex specializes in both dry fabrics and prepreg advanced composite materials.

Vertically integrated operations spanning carbon fiber weaving, resin and prepreg development, and impregnation.

Known throughout Europe as a premium carbon fabric and prepreg supplier, products are used in structural and aesthetic applications for super-luxury automotive, motorsports, aerospace and marine industries.

Aerospace



Space



Industrial Applications



Automotive



Sports Equipments



Composite Technologies Full Portfolio Overview



Five material families. One integrated platform.
Engineered for the world's most demanding industries.

GLOBAL LEADERS

Fabrics

AS 9100 and EN 9100:18 production facilities capable of producing the most technically advanced fabrics in the world.

Experts in Carbon Fiber, Aramids, Fiberglass, Ceramic, and Quartz fabrics.

APPLICATIONS

Aerospace · Automotive
· Marine · Defense · Medical

PERFORMANCE EDGE

- High strength-to-weight ratio across fiber types
- Hybrid & custom weave configurations

HIGH-PERFORMANCE MATRIX

Thermoset Prepreg Systems

Epoxy-based prepreg systems for structural performance and safety.

APPLICATIONS

Aerospace · Automotive
· Wind Energy · Marine

PERFORMANCE EDGE

- Out-of-Autoclave (OOA) options available
- Low smoke & toxicity performance

SCALABLE & RECYCLABLE

Thermoplastic Composite Systems

Lightweight thermoplastic composites built for high-volume manufacturing.

APPLICATIONS

Automotive · Industrial
· Sports

PERFORMANCE EDGE

- Recyclable matrix
- 45–55% fiber volume

BIO-BASED SOLUTIONS

Natural Fiber Composites

Flax and hemp fibre composites with thermoplastic matrices.

APPLICATIONS

Automotive · Sports
· Industrial

PERFORMANCE EDGE

- Bio-based, lower carbon footprint
- Aesthetic surface finish

MATRIX INNOVATION

Advanced Resin Systems

High-performance resin matrices for aerospace, mobility and industrial use.

APPLICATIONS

Aerospace · Industrial
· Mobility

PERFORMANCE EDGE

- Tailored for complex thermal requirements
- Compatible with diverse fiber systems

Mission-Critical Composite Solutions



Four flagship solutions built for environments where standard materials reach their limits.

AEROSPACE & ENERGY EXCLUSIVE

Ceramic Matrix Composites (CMC) Prepregs

Defying Heat. Redefining Reliability.

APPLICATIONS

Aircraft Engine Surrounds · Aerospace Structures · High-Temp Industrial

PERFORMANCE EDGE

Up to 1200°C

Outlasts conventional composites in extreme thermal environments

Inherently Flame Retardant

Meets the strictest aerospace certification standards

Chemical Resistant

Stable in oxidative and corrosive conditions

SAFETY-CRITICAL APPLICATIONS

Flame-Retardant Epoxy Prepregs

Safety Engineered Into Every Layer.

APPLICATIONS

Aircraft Interiors · Rail & Transit · Industrial Fire Zones

PERFORMANCE EDGE

Low Smoke & Toxicity

Meets fire safety standards for confined, occupied spaces

Bio-Based Chemistry

Sustainable resins without compromising fire performance

OOA Processing

Lower energy and cost-efficient manufacturing

HIGH-PERFORMANCE STRUCTURES

Carbon-Reinforced Fabrics & Prepregs

Strength Without the Weight.

APPLICATIONS

Aerospace · Motorsport · Advanced Automotive · Sports Equipment

PERFORMANCE EDGE

Exceptional Stiffness

Best-in-class strength-to-weight for lighter, stronger structures

Class-A Surface Quality

Consistent finish for visible structural and exterior parts

Aerospace Qualified

OEM-approved with full qualification documentation

NEXT-GEN MOBILITY

Thermoplastic Automotive Prepregs

Mass Production Meets High Performance.

APPLICATIONS

Passenger & Commercial EVs · Automotive Body & Structural

PERFORMANCE EDGE

OEM-Ready at Scale

Fast cycle times and repeatable quality for high-volume lines

Fully Recyclable

Supports circular economy and OEM sustainability mandates

45–55% Fiber Volume

Superior flexural strength over conventional alternatives

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THANK YOU