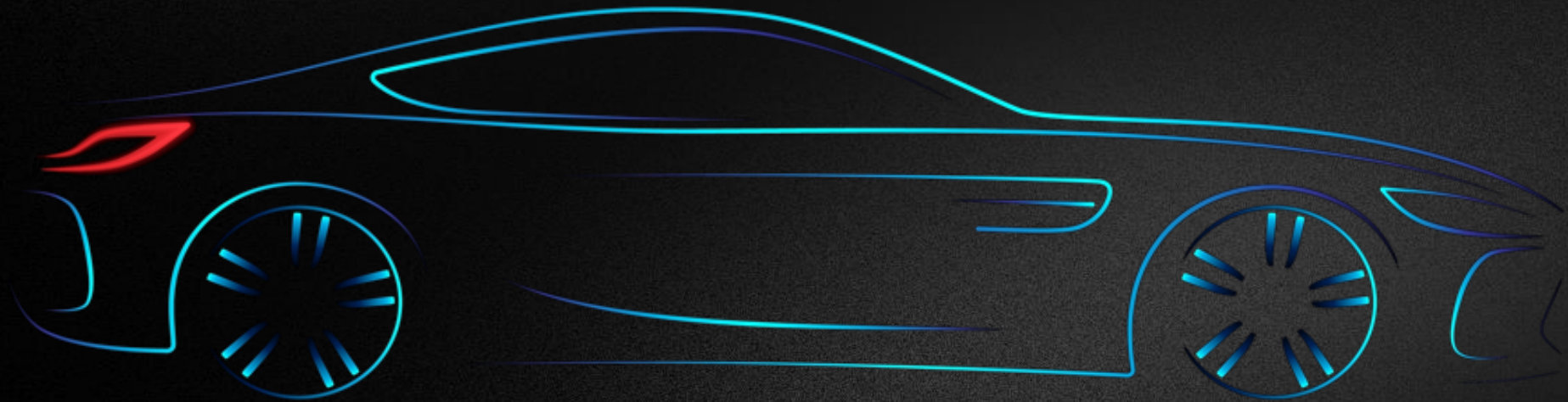


THE MOBILITY (R)EVOLUTION IMPACTING SUPPLY CHAINS

Fathi Tlatli

President Global Auto-Mobility sector, DHL



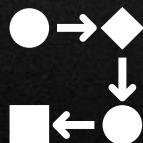
WE NEVER STOP DELIVERING EXCELLENCE TO THE AUTO-MOBILITY INDUSTRY

A tailored set of solutions developed to tackle challenges from planning to aftermarket returns



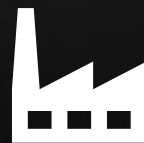
PLAN

- Supply Chain **consulting** solutions
- **Network** design
- **Inventory** management
- **Risk** management
- **Green logistics**
- New product launch logistics
- Lead logistics provider (LLP)



SOURCE

- Road freight solutions
- AFR / OFR solutions
- Multi-modal solutions
- Emergency solutions
- Customs
- Buyer's consolidation
- Off-Site warehousing
- Materials / supplier management
- Procurement & packaging services



MAKE

- Manufacturing logistics
- Sequencing
- Sub-assembly
- Line-feeding
- CKD solutions
- Near-site warehousing
- On-site / shuttle transport
- Supplier parks



SELL

- Marketing material
- Trade fair logistics
- E-commerce solutions
- Demo fleet solutions



DELIVER

- Fleet management
- Premium vehicle moves
- EU / CN rail car moves
- Finished vehicle LLP



SERVICE

- Distribution centers
- Direct-to-dealer services
- VOR services
- Repair and return
- Shared networks / DCs

Top Auto-Mobility trends impacting global Supply chains



1

Highly competitive industry under pressure

- **Reorganization** of global supply chains for **resilience**
- **Tier 1 suppliers** going through model and product **transition**

2

Electrification driving industry transformation

- **Battery value chain** growth
- **New entrants** challenging the rules

3

Sustainable industry development

- **New energy** partnerships
- **Sustainable** supply chains

4

New Mobility Models Shared & Digital

- **Software driven** industry
- Growing importance of **fleets**



HIGHLY COMPETITIVE INDUSTRY UNDER PRESSURE

Dynamic & global markets in action

New Auto-Mobility **powerhouses VS**
historical markets as global trade rules
evolve quickly

Tier 1 supplier reorganization

Significant **increase in M&A volume**
across the region New **technology leaders**
entering the Auto-Mobility arena

545k

Units sales in 2025 in
South Africa
(6% growth Vs 2024)



66%

Share of local vehicle
production exported
in 2023

SUPPLY CHAIN RISK INSIGHTS
FOR BUSINESS PLANNING

AI-powered predictive insights for intelligent end-to-end action



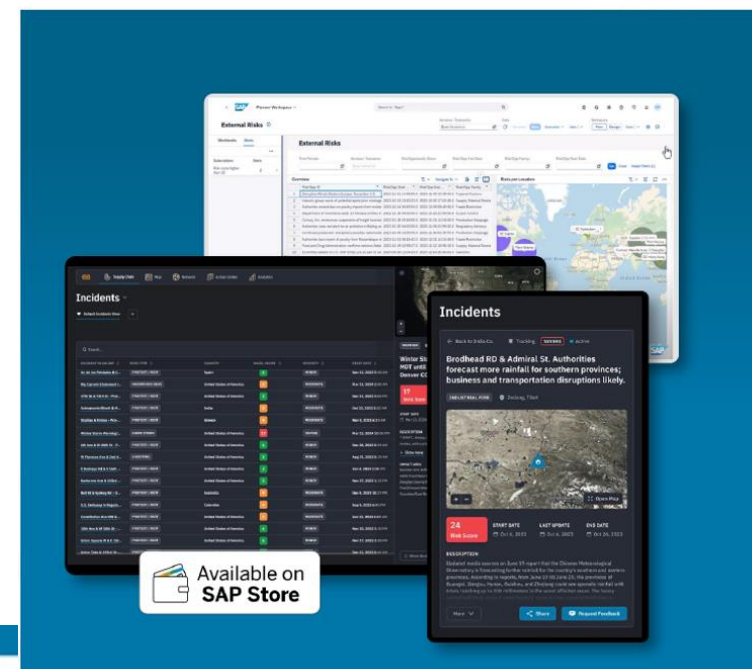
Advanced supply chain digital twin
and end-to-end visibility



Targeted risk intelligence in IBP to
protect and streamline material flow
and logistics

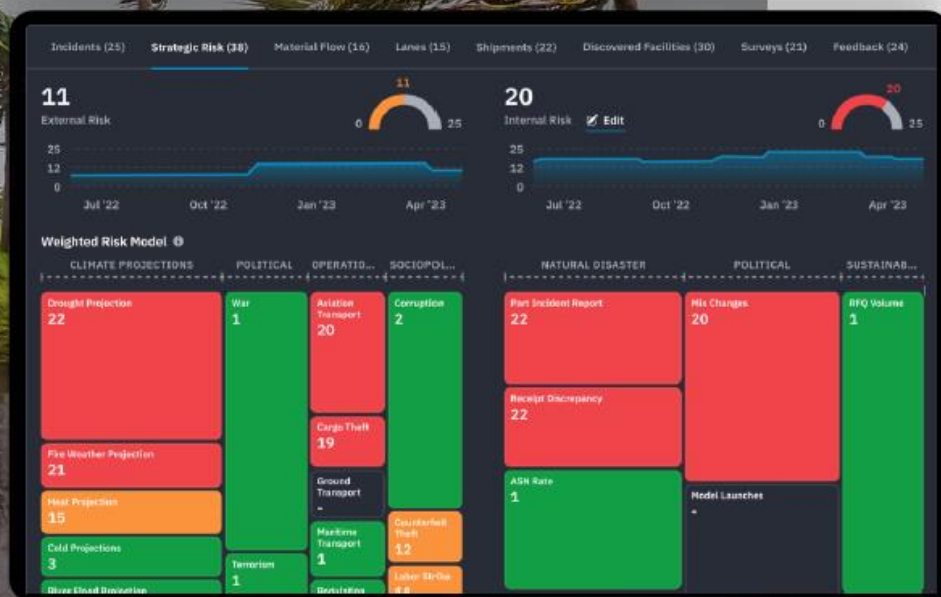


Optimized scenario planning for
enhanced value chain competitiveness



Climate Projection Risk Scores

Predict and quantify the impact of climate indicators on your specific network locations with strategic risk scoring



Categories:

Tropical Cyclone

River Flood

Sea Level Rise

Heat

Fire Weather

Cold

Drought

Precipitation



Quantify location climate impact with eight near-term climate indicator scores that reflect 2030 risk severity



Project risk impact to 2100 and visualize future severity levels based on multiple climate change pathways



Leverage advanced climate projection data from the Intergovernmental Panel on Climate Change (IPCC) and location-specific scoring algorithms for accuracy



Engage in climate risk-informed network planning, supplier selection, and facility development to build long-term resiliency

ELECTRIFICATION DRIVING INDUSTRY TRANSFORMATION

Battery industry growth

Gigafactories and EV assembly plants are popping up all around the world

Battery supply chain developing from **raw materials to recycling**

Rising stars are gaining market share

New players (e.g. from Asia) expanding overseas and technology leaders leveraging the mobility revolution



8.73%



**South Africa Automotive
EV market CAGR (2025-
2029)**

9%

**Of all passenger & light
commercial vehicles sold
in South Africa were from
Chinese brands in 2024**

DHL EVL VALUE PROPOSITION

EV Inbound-to-Manufacturing Logistics



- **Compliant & Safe** International Transport solutions for battery & raw materials
- **Condition monitoring / temperature control** for durability

EV Manufacturing Logistics



- **Compliant** pre-assembly battery warehousing & handling
- **Process adaptation** to “simpler” EV Manufacturing

Aftermarket & Battery Circularity



- **Shared warehousing & Distribution network**
- **Compliant return networks, testing, repair & recycling**

Charging Infrastructure Deployment



- **Installation & maintenance of private & public charging stations**
- **E-commerce** distribution for home chargers

Market leading EV expertise underpinning the end-to-end or modular process



Global Expertise & Local Knowhow, demonstrating thought leadership in EV Logistics



Knowledge sharing & events on all things EV



EV Workshops to enhance your supply chain leveraging latest **innovations**

EV COE DEVELOPMENT ACROSS REGIONS AND SOLUTION SETS



WHAT are the impacts on the South African value chain?



Implications of new trends on the industry

Car parts transform

- **New components**
- **Safety features** become more important as part of autonomous driving
- **New EV technology** developments make new components available



After-sales market changes

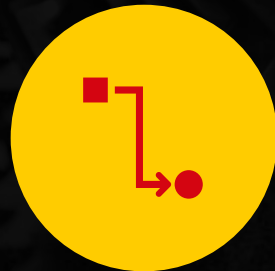
- **Software features** and over the air updates
- Increased **demand of spare parts** per car caused by **high utilized shared cars**
- **Reduced maintenance needs for EVs**

Company environment changes

- **New business opportunities**
- **Acquisitions and cooperation**
- **New players** with new competencies

Production is affected

- **Shorter development cycles**
- Increased **efficiency in production** due to Internet of Things & Industry 4.0
- **New countries** attracting investments



THANK YOU

❏ >>>> **Let's reinvent the future together!**

