

## A NEW GENERATION OF MOBILITY

2024 INTEGRATED REPORT



THAT'S...  
**€11.6 bn**  
IN REVENUE



**38,900**  
EMPLOYEES



**28**  
COUNTRIES



**150**  
PLANTS



**40**  
R&D CENTERS

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# MESSAGE FROM LAURENT BURELLE

Chairman of the Board of Directors of OPmobility

**In 2024, OPmobility proved the merits and demonstrated the success of its long-term strategy** and developed a profitable growth model based on innovation, complementary expertise and the diversification of its international presence.

Once again, the Group improved all its results in 2024. To meet the needs of our long-standing customers and expand into new markets, we have considerably broadened our offerings in lighting, battery electric vehicles, hydrogen vehicles and on-board intelligence.

Underpinned by the dynamism of our long-standing activities, the development of these new growth drivers is a key part of our strategy, enabling us to support the major transformations of the mobility industry.

Over the last 80 years, the Group has always been known for its ability to adapt to a changing world. That's why we have fundamentally transformed from a diversified industrial Group to become a world leader in sustainable mobility in all its forms. That's what we chose to express by changing our name to OPmobility in early 2024. This name pays tribute to our past and our values, while looking to the future with our teams, our customers and our shareholders.

**"As a leader in sustainable mobility, OPmobility developed a profitable growth model and successfully pursued its transformation in 2024, enabling it to look to the future with confidence."**

With the support of our governance and its leadership and the dedication of our 39,000 employees around the world, we are looking to the future with confidence and determination as we pursue a long-term investment and innovation policy in response to current technological and geopolitical shifts.

Our strong and dedicated majority shareholder base supports this strategy.

# MESSAGES



**LAURENT FAVRE**

Chief Executive Officer  
of OPmobility

"In a market environment which continued to be challenging in 2024, we successfully combined performance and growth, without losing sight of our strategic focus."

In 2024, OPmobility confirmed its position as a leader in sustainable mobility.

Throughout the year, our Group reported **strong financial and operating performance**, in a difficult market, characterized by low production volumes within the automotive industry and lower-than-expected sales of electric vehicles. We outperformed the market in all the regions in which the Group operates, while continuing to pursue growth in all our activities.

**These figures are the result of the unwavering commitment of the Group's 38,900 employees and confirm the importance of our strategy, focused on the 3 pillars** of diversifying the Group's technologies, global presence and customers. With a stronger and diversified portfolio of products and technologies, we have accelerated our international development, primarily in the United States, which is now our biggest market, and Asia. New customers have trusted us with their business, from new players in electric and autonomous mobility to heavy and commercial mobility manufacturers.

These strategic successes are underpinned by **the operational and commercial successes of our Business Groups**. Exterior significantly increased its sales and received a considerable number of orders, particularly in the United States and China. Lighting finished the year with a full order book and plans to launch 60% more projects in 2025 than it did in 2024. The profitability of our Modules activity improved sharply in 2024, strengthening the activity for the coming years. C-Power, which produces fuel tanks, also had a good year, continuing to improve market share within the shrinking thermal vehicle market. Lastly, H<sub>2</sub>-Power, our hydrogen activity, enjoyed significant commercial success in 2024, particularly with trains and buses.

By demonstrating unprecedented adaptability and strengthening both our competitiveness and our operational excellence, we efficiently accelerated our transformation strategy to contribute to more sustainable mobility which is accessible to all.

**Just what we need to face the challenges of 2025 and beyond with confidence and enthusiasm!**



**FÉLICIE BURELLE**

Managing Director  
of OPmobility

"More than ever, innovation is the driving force behind the transformation of mobility. We must act quickly to provide our customers with increasingly disruptive solutions."

**In response to the large-scale and rapid transformation of our industry, we are focusing all our energy on turning these changes into opportunities which will benefit our customers, society and future generations.**

We are committed to innovation, because innovative solutions are essential if we are to rise to the formidable challenge of sustainable mobility, while continuing to offer products and solutions which are accessible to the widest possible audience. That's the objective behind our approach to innovation: sharing expertise between Business Groups, as we do at our Innovation Days, and working with an entire ecosystem of academic partnerships and start-ups.

We kicked off 2025 at the Consumer Electronics Show (CES) in Las Vegas, attending the event for the first time as OPmobility. At the heart of the world's most powerful innovation event, we confirmed our position as a major technology partner of a new generation of mobility.

Innovation also means being able to provide our customers with increasingly customized and differentiated solutions. That's the idea behind One4you, our integrated offer for vehicle exteriors which combines our expertise in exterior body parts, lighting, modules and software. With One4you, we are reinventing our relationships with our customers, providing customized and innovative technological solutions which will make them more competitive.

Lastly, we are more focused than ever on sustainable development because tomorrow's mobility must be more environmentally friendly for the planet and its inhabitants. Inspired by our purpose of "Driving a New Generation of Mobility", we have reached new milestones this year in terms of the energy transition, which are vital to ensure the future we all want. In 2025, OPmobility's operational activities will be carbon neutral. And we will continue to implement our roadmap to carbon neutrality to achieve our objectives across our entire value chain, providing a growing number of solutions for low-carbon powertrains and recycled materials.

# READY FOR NEW HORIZONS

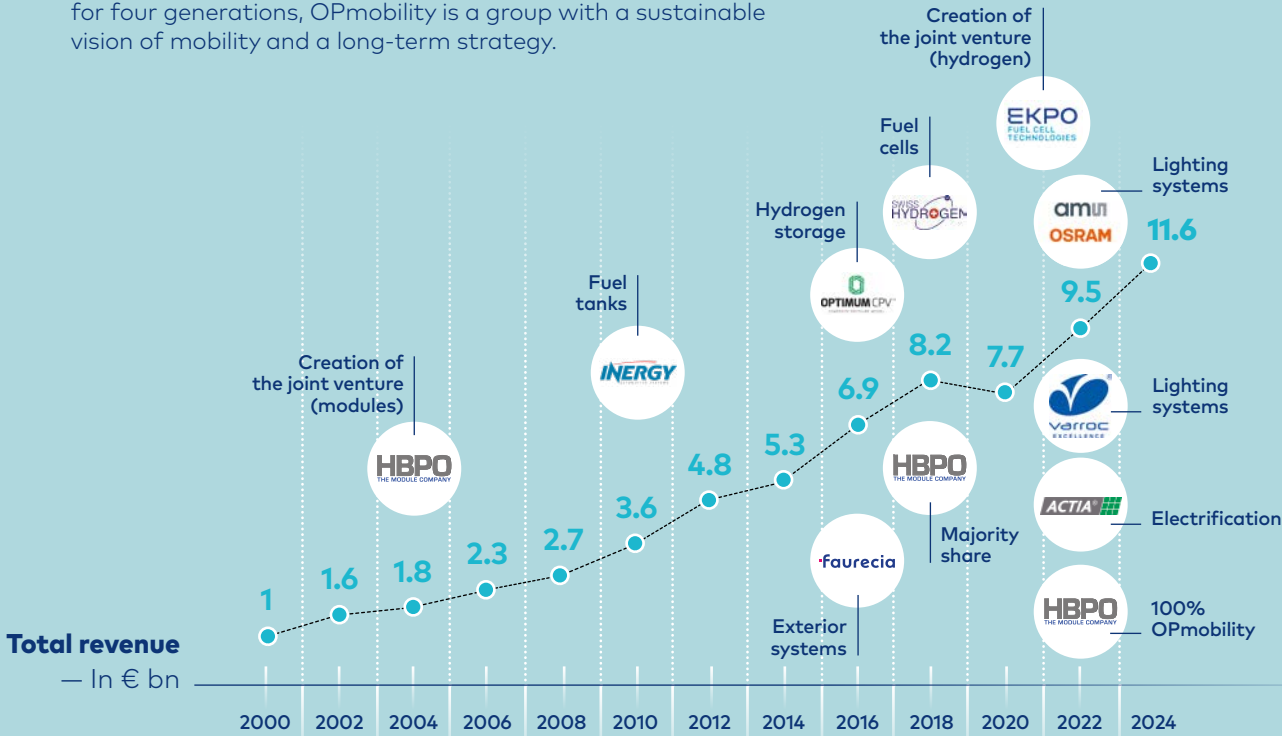
Almost 80 years after it was founded, OPmobility is accelerating with a new brand and new ambitions. With its new name, the OPmobility Group has embarked on a new chapter in its history, confirming its strategic transformation as a leader of sustainable and connected mobility. Today, with four Business Groups and a dedicated software activity, OPmobility is growing worldwide and expanding its customer portfolio to include all mobility players.

# OPMOBILITY, A WORLD LEADER IN SUSTAINABLE MOBILITY

In a world of profound transformation, in which the pace of change is accelerating and the challenges of climate change are influencing consumer habits and modes of transport, mobility is undergoing an unprecedented revolution. In keeping with its purpose of "Driving a New Generation of Mobility", OPmobility seeks to play a central role in this transformation of mobility and energy. The company continues to develop its technology offerings to become a major player in more sustainable and more connected mobility which is accessible to all.

## Continued growth, supported by the strategy of a family-run company

In just a few years, OPmobility has implemented an ambitious strategic roadmap which has resulted in diversification through major acquisitions and the expansion of both its customer portfolio and its global presence. The Group has enjoyed rapid growth, driven by organic development and successful acquisitions and joint ventures. As a family-run company for four generations, OPmobility is a group with a sustainable vision of mobility and a long-term strategy.



## A diversified and complementary technology portfolio

With an extensive and innovative range of technology offerings, divided into two main product lines, the Group has positioned itself as the leading technology partner for all forms of mobility around the world.

### EXTERIOR & LIGHTING



Exterior body systems and lighting

### Exterior solutions

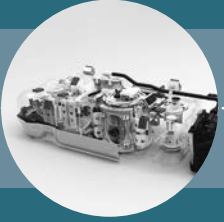
### MODULES



Module design, development and assembly

### Powertrain solutions

### C-POWER



Energy and pollution control systems, batteries and electrification systems

### H<sub>2</sub>-POWER



Hydrogen

(1) Since February 1, 2025, OPmobility is made up of 4 Business Groups: Exterior & Lighting, Modules, C-Power and H<sub>2</sub>-Power.

## A diversified customer portfolio, reflecting today's mobility

Over the last few years, the Group has undergone a major transformation by expanding its activities around the world and diversifying its customer portfolio, including new players in electric mobility. OPmobility is able to meet the needs of all types of mobility and is determined to support its customers in their transition to decarbonized mobility.

**Long-standing automotive manufacturers**  
Volkswagen Group, Stellantis, Mercedes-Benz Group, General Motors Group, BMW Group, Ford and more.

**New players in electric mobility**  
BYD, Nio and more.

**Looking beyond the automotive sector to key players in heavy and public mobility<sup>(1)</sup>** CRRC (China Railway Rolling Stock Corp.), Alstom, Stadler, Daimler Truck and more.

(1) Buses, trucks, trains.

# OUR GOVERNANCE

THE BOARD OF DIRECTORS protects the interests of the Group, its shareholders and its stakeholders, while ensuring an ethical and transparent approach. It is made up of a balanced group of representatives of the Burelle family and independent directors: 16 members with complementary managerial, industrial and financial skills. It establishes OPmobility's strategic priorities and oversees their implementation, with the support of 3 specialized committees: the Audit Committee, the Appointments and CSR Committee and the Compensation Committee.



**LAURENT BURELLE**  
Chairman of the Board of Directors of OPmobility SE  
*Director since 1981*



**LAURENT FAVRE**  
Chief Executive Officer of OPmobility SE  
*Director since 2020*



**FÉLICIE BURELLE**  
Managing Director of OPmobility SE  
*Director since 2017*



**GONZALVE BICH<sup>(1)</sup>**  
Member of the Compensation Committee  
*Director since 2023*



**AMANDINE CHAFFOIS**  
Member of the Compensation Committee  
*Director representing Group employees since 2019*



**ANNE-MARIE COUDERC**  
Member of the Appointments and CSR Committee  
Member of the Compensation Committee  
*Director since 2010*



**VIRGINIE FAUVEL<sup>(1)</sup>**  
Member of the Appointments and CSR Committee  
*Director since 2023*



**ALEXANDRE MÉRIEUX<sup>(1)</sup>**  
Chairman of the Compensation Committee  
*Director since 2018*



**CÉCILE MOUTET**  
*Director since 2017*



**MARTIN KRIVAN**  
*Director representing Group employees since June 20, 2024*



**VINCENT LABRUYÈRE**  
Member of the Audit Committee  
*Director since 2002*



**PAUL HENRY LEMARIÉ**  
Chairman of the Board of Directors of Burelle Participations  
*Director since 1987*



**LUCIE MAUREL AUBERT<sup>(1)</sup>**  
Chairwoman of the Appointments and CSR Committee  
Member of the Audit Committee  
*Director since 2015*



**ÉLISABETH OURLIAC<sup>(1)</sup>**  
Chairwoman of the Audit Committee  
*Director since 2022*



**JEAN BURELLE**  
Non-voting board member since February 17, 2021  
Honorary Chairman of Burelle SA  
Honorary Chairman of OPmobility SE  
*Director from 1970 to 2021*



**PROF. DR. BERND GOTTSCHALK**  
Non-voting board member since July 24, 2023  
*Director from 2009 to 2023*

50%  
women

Average age of  
58

42%  
independent  
directors

(1) Independent director.

# OUR GOVERNANCE

THE EXECUTIVE COMMITTEE assists with the implementation of the Group's strategy, oversees its transformation and manages its performance. It meets once a month to review the Group's activities, analyze its position and consider its options for the future.



THE EXECUTIVE COMMITTEE ON MARCH 14, 2025, FROM LEFT TO RIGHT:  
**CLARA CUNOT**, Senior VP, Communications – **DAMIEN DEGOS**, Senior VP, Purchasing Performance –  
**MARC PERRAUDIN**, Executive VP, President H<sub>2</sub>-Power Business Group – **CHRISTOPHE MARCEAU**, Executive VP,  
President Modules Business Group – **YOUSSEF SOUBA**, Executive VP, President C-Power Business Group –

**LAURENT FAVRE**, Chief Executive Officer – **HÉLÈNE DANTOINE**, Executive VP, General Counsel & Chief  
Compliance Officer – **FÉLICIE BURELLE**, Managing Director – **CHRISTIAN KOPP**, Senior Executive VP, President  
Exterior & Lighting Business Group – **DAVID MENESES**, Executive VP, People & Sustainability – **GÉRALD MENTIL**,  
Executive VP, Chief Performance Officer – **OLIVIER DABI**, Executive VP, Chief Financial Officer.

# CONSTANTLY EVOLVING MOBILITY

## An automotive market in an uncertain climate

TREND1

Between 2019 and 2022, the global automotive market was confronted with successive crises – the pandemic, a shortage of semi-conductors, geopolitical tensions, a slowdown in growth and inflation, leading to low volumes. The market was also affected by slower-than-expected electrification and consumer uncertainties about which technology to choose. After volumes rose in 2023, global automotive production amounted to 86.8 million vehicles in 2024.

### Cheaper vehicles

To respond to consumer demand, new mobility players are offering more affordable electric vehicles, particularly in China, while long-standing manufacturers are adapting their strategy to

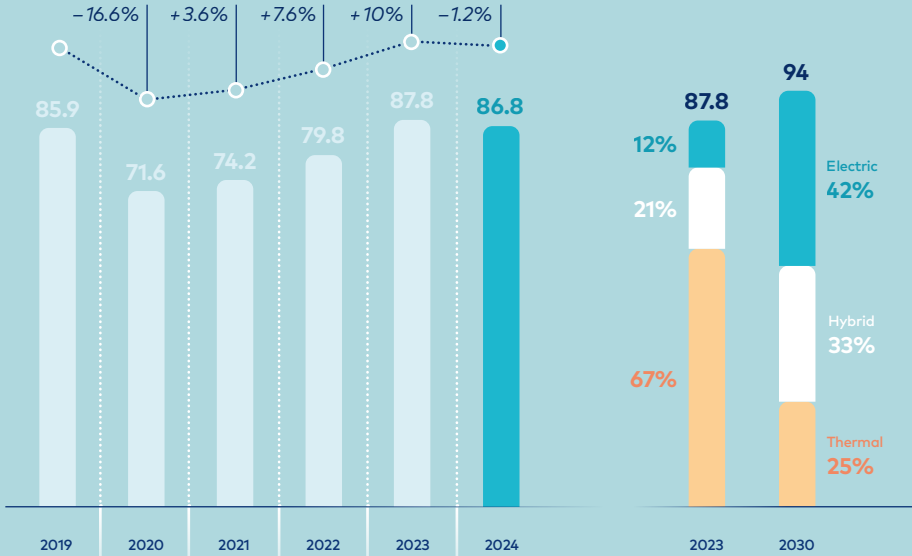
produce electric vehicles at lower prices, while reducing development time. Hybrid vehicles are proving very popular with consumers, particularly in the United States and China.

### Increasingly connected vehicles and autonomous mobility

Mobility is becoming increasingly connected and the industry is embarking on the era of the Software Defined Vehicle<sup>(1)</sup> and Artificial Intelligence. In China and the United States, level 4 autonomous mobility (self-driving vehicles in certain areas) is becoming a reality, while Europe is lagging behind.

(1) A vehicle with features and functions which are primarily enabled through software.

**The electrification of global automotive production is gathering pace in a declining market**  
— In millions of vehicles



Source: S&P Global Mobility, Vehicle Production, published in February 2025 – [0-3.5 t PC + LCV].

## The age of agility

TREND2

### An uncertain regulatory environment

In Europe, Germany stopped providing financial support for electric vehicle purchases in late 2023, France has reduced financial aid for the low-cost leasing of electric vehicles and there is no single Europe-wide approach to boost investment in the industry. However, regulations, particularly the CAFE\* standard, are forcing manufacturers to make ever greater efforts and investments, with a planned phase-out of combustion engines in 2035. In the United States, the Inflation Reduction Act boosted investment across the industry.

### A wide range of technologies

Traditional combustion engines, combustion engines powered by alternative fuels, battery vehicles, hydrogen-powered vehicles: manufacturers, consumers and governments are faced with different technologies which continue to coexist.

\*The European CAFE (Corporate Average Fuel Economy) standard aims to reduce the fuel consumption and carbon dioxide emissions (CO<sub>2</sub>) of motor vehicles. In 2025, the aim is to reduce the global average to 93.6 gCO<sub>2</sub>/km per new vehicle sold (electric, plug-in hybrid, hybrid, thermal).

## A hyper-competitive environment

### New players

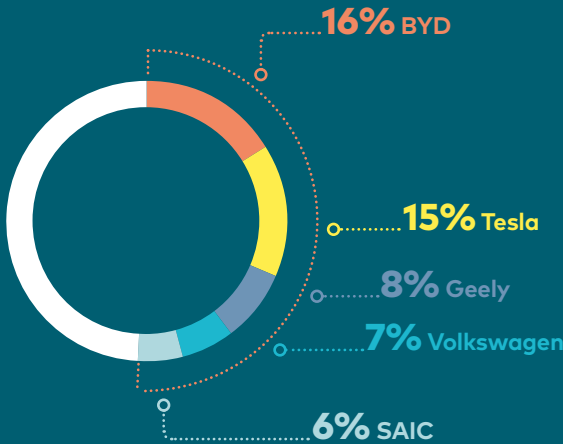
Long-standing automotive manufacturers are facing unprecedented disruption to the market and consumer habits. In this landscape, new players, driven by the development of electric vehicles, have emerged and are now well-positioned, with very short development cycles of between 18 and 24 months.

Today, China is the world's leading automotive manufacturer (29.6 million vehicles in 2024, all powertrains combined) and the leading manufacturer of battery electric vehicles (7.6 million vehicles in 2024). The country has wide-ranging expertise across the entire electric vehicle value chain, from the extraction and refining of critical raw materials to the production of batteries.

TREND3

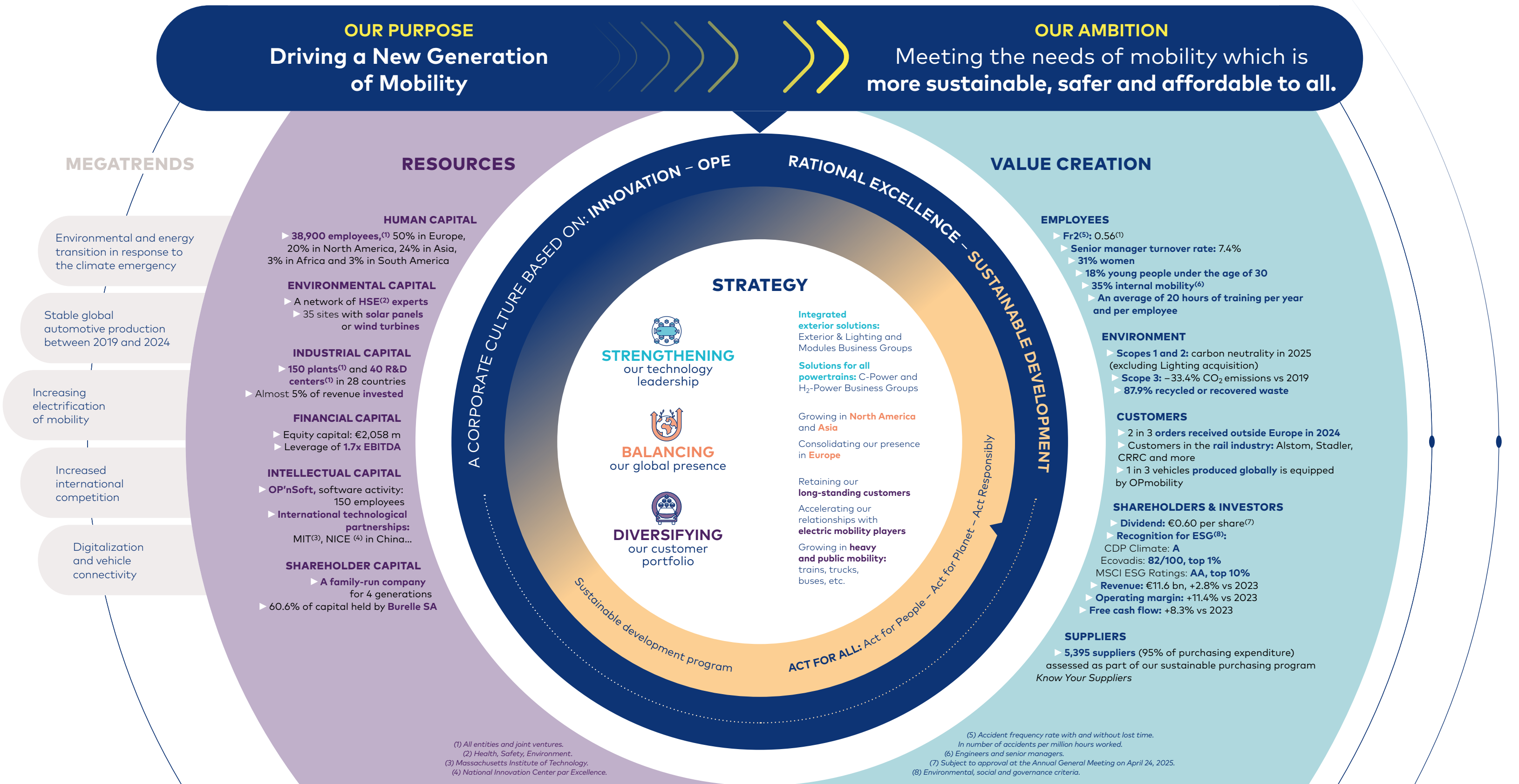
**The world's leading electric vehicle manufacturer is now BYD, a Chinese manufacturer which overtook the American company Tesla in late 2023**

**Top 5 electric manufacturers in 2024**  
— In automotive production market share



Source: S&P Global Powertrain, published in January 2025 – [0-3.5 t].

# OUR BUSINESS MODEL

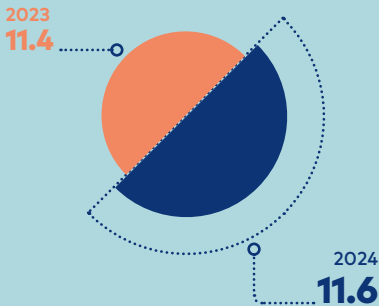


# OUR PERFORMANCE

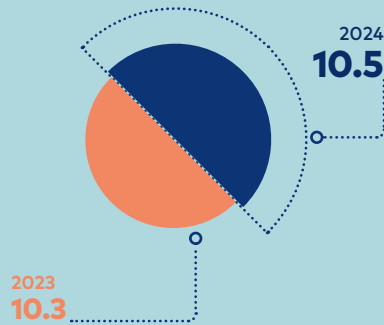
In 2024, the Group delivered a very solid performance, despite the automotive sector's highly complex context. With revenue of €11.6 billion, up +2.8%, OPmobility distinguished itself in a shrinking and particularly competitive market. The operating margin rose significantly by +11.4%, as did the net result, up +4.2%. With regard to extra-financial performance, the Group confirmed its decarbonization strategy and its aim to achieve carbon neutrality for scopes 1 & 2 emissions in 2025.

## Financial indicators

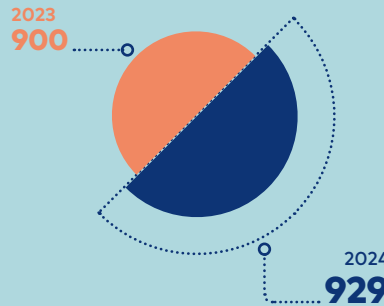
**Economic revenue**  
— In € bn



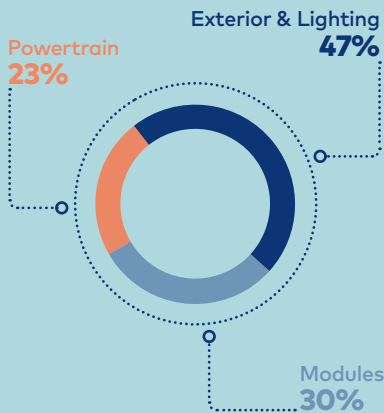
**Consolidated revenue**  
— In € bn



**EBITDA**  
— In € m



**Breakdown of 2024 consolidated revenue by segment**  
— In %



**Free cash flow**  
— In € m



**Net result Group share**  
— In € m



**Operating margin**  
— In %



**Net debt**  
— In € m



**Net debt/EBITDA**

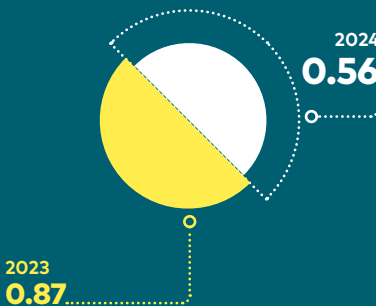


**Liquidity**  
— In € bn



## Extra-financial indicators

**SAFETY**  
Accident frequency rate with and without lost time (Fr2)<sup>(1)</sup>



**TRAINING**  
Average number of hours of training per year and per employee



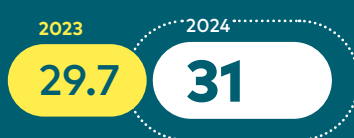
**Employees who completed ACT FOR ALL Climate School training<sup>(2)</sup>**



**CYBERSECURITY**  
Employees trained in cybersecurity



**DIVERSITY**  
Women in the Group — In %



**Female engineers and managers**  
— In %



**Women on the Board of Directors**  
— In %



**Employees with disabilities**



**Interns and apprentices**

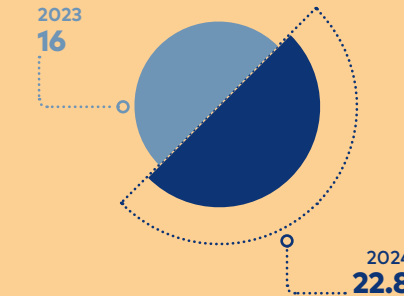


**Responsible procurement**  
Suppliers assessed as part of the Know Your Suppliers program<sup>(1)</sup>

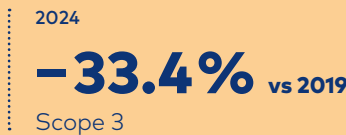
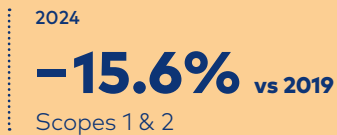


(1) A program to assess and support suppliers in their approach to sustainable development.

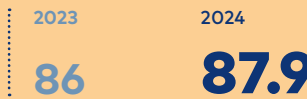
**Renewable energy produced on sites**  
— In GWh



**Carbon neutral plan**  
CO<sub>2</sub> emissions linked to operational activities



**Waste disposal**  
Recycled or recovered waste — In %



(1) In number of accidents per million hours worked. All entities and joint ventures.  
(2) Training which provides the necessary knowledge and tools to have a positive impact on the environment.

# OUR RISKS MANAGEMENT

OPmobility operates in a constantly changing environment, in terms of industry, economics, politics and regulations. The Group reviews and assesses the risks which could affect its activities. To protect against these risks and limit their potential consequences, OPmobility implements stringent internal controls.

## Main risk factors

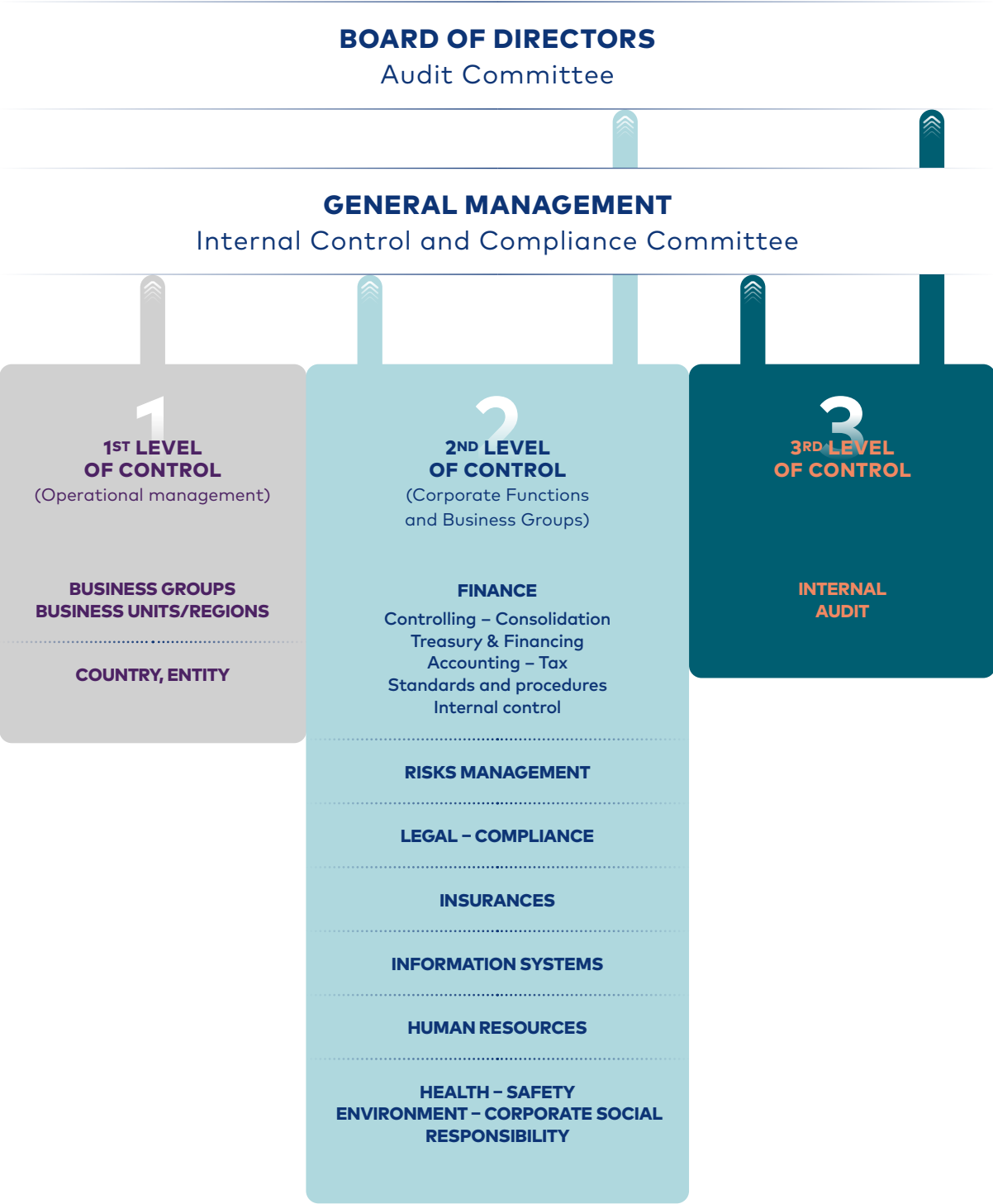
OPmobility's main risk factors are assessed on the basis of the probability of their occurrence and the estimated extent of their impact.

RISK CATEGORIES	Risk factors	Importance	Extra-financial risk
OPERATIONAL RISKS	Automotive programs	●●●	
	Quality of products and services sold	●●●	✓
	Shortage of raw materials or components	●●●	✓
	Health, safety and environment	●●	✓
	IT	●●	
STRATEGIC RISKS	Impact of climate change on the business model	●●●	✓
	Innovation	●●●	✓
	Acquisitions	●●●	
CREDIT AND/OR COUNTERPARTY RISKS	Customers	●●●	
	Suppliers	●●	✓
MARKET RISKS	Inflation	●●	
LEGAL RISKS	Business ethics	●●	✓
	Intellectual property	●●	

●●● High    ●● Moderate    ● Low

## Control activity

To ensure responsibility and independent judgment, OPmobility has a three-level structure which oversees its operations and risk management processes: Operational Departments, General Functions and Internal Audit.



# EMBRACING ALL FORMS OF MOBILITY

In a rapidly changing market, OPmobility has established a clear roadmap, focused on three key areas: diversifying its technologies, global presence and customers. The Group has opted for innovation, agility and proximity to seize all future opportunities and contribute to more sustainable, safer and more affordable mobility.



STRATEGIC PILLAR #1

# STRENGTHENING our technology leadership

The mobility of today and tomorrow is multi-faceted: OPMobility has therefore made technological diversification its first strategic pillar.

To seize opportunities and anticipate global market trends, the Group is expanding and strengthening its technology offerings. In this way, it can cater to the needs of end customers, whatever their choice of powertrain, whether electric (hydrogen or battery), hybrid or thermal. The objective? To develop our portfolio by strengthening our long-standing technology leadership in exterior body parts, fuel tanks and complex models and through targeted acquisitions to incorporate new areas of expertise. As such, over the last three years, the Group has made major acquisitions in lighting, hydrogen and batteries, sectors which are complementary to our long-standing activities.

To innovate in software, as vehicles become increasingly connected, the Group created OP'nSoft in 2023. Focused solely on on-board software, this entity provides integrated solutions and services with which to support our customers as they move towards the Software Defined Vehicle.

In addition to our efforts to strengthen our technology offerings, we have embarked on increasing digitalization across our sites, capitalizing on the power of Artificial Intelligence to improve our manufacturing processes. Modeling, simulation, image processing: by using AI, the Group can make the most of available data to monitor the quality of our parts and the quantity of material inputs as closely as possible during the manufacture of our products.



To find out more about OPMobility's latest technological innovations, presented at CES Las Vegas 2025.



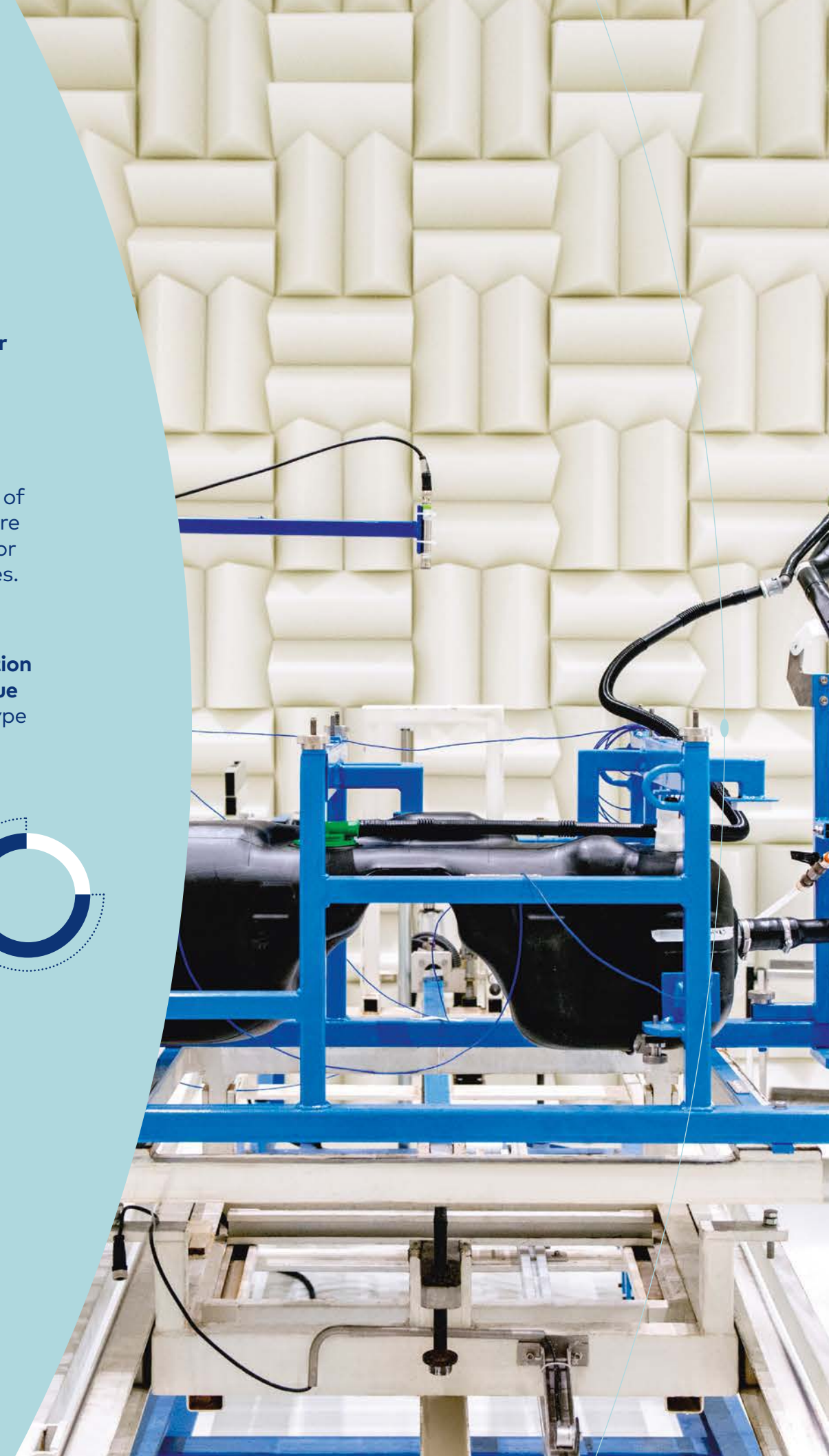
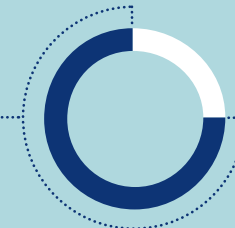
## NEED TO KNOW

A comprehensive range of solutions for all powertrains to seize new market opportunities, such as the acceleration of hybrid vehicles. In 2024, around 10% of C-Power's orders were linked to programs for plug-in hybrid vehicles.

A significant proportion of the Group's revenue is unrelated to the type of powertrain.

Breakdown  
of 2024 revenue  
— In %

More than **75%**  
generated  
by the Exterior  
& Lighting  
and Modules  
Business Groups

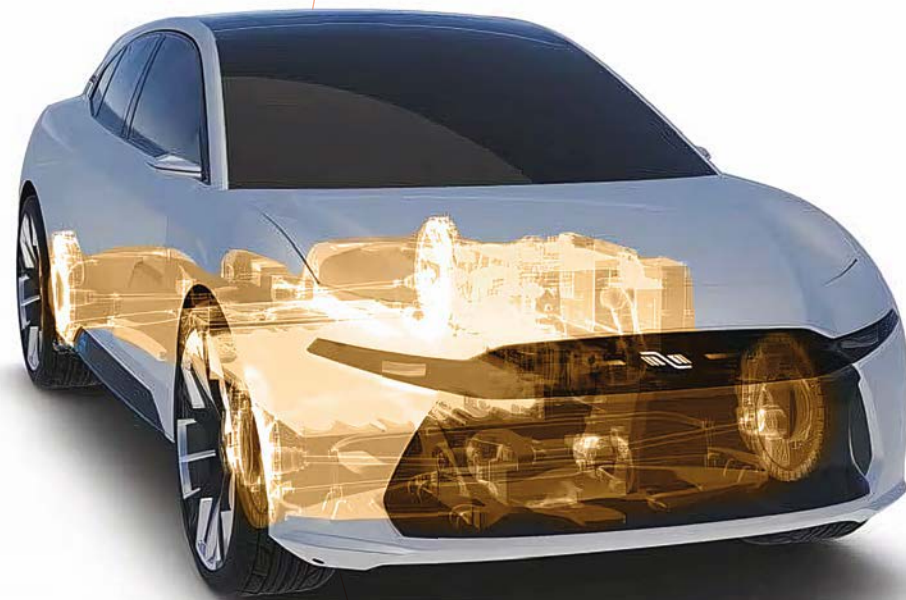




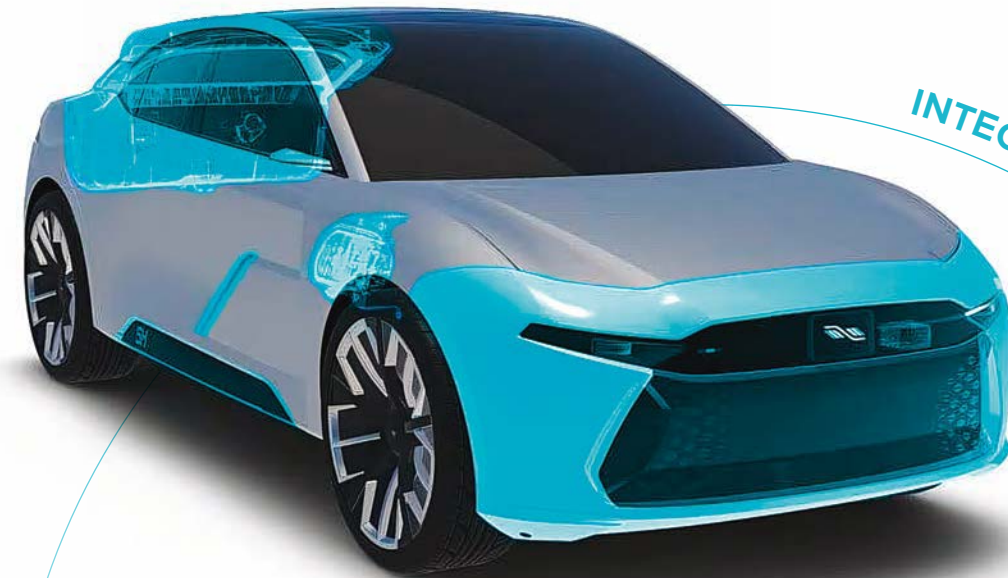
## OUR TECHNOLOGIES AND EXPERTISE FOR A NEW GENERATION OF MOBILITY

### SOLUTIONS FOR ALL POWERTRAINS

- Fuel vessels and pollution control systems
- High-pressure hydrogen tanks  
Fuel cells  
Integrated hydrogen systems
- Battery systems  
and electrification solutions



Find out from  
Laurent Favre how  
OPmobility's innovative  
solutions are contributing  
to tomorrow's mobility.



### INTEGRATED EXTERIOR SOLUTIONS

- One4you**  
Exterior systems:  
bumpers, tailgates, spoilers,  
fender flares, rocker panels,  
door trims
- Interior lighting  
Front and signal lighting  
Custom lighting  
Road surface light projection
- Front-end modules  
Cockpit modules

**1** in **3**  
vehicles produced globally  
is equipped by OPmobility

Source: S&P Global Mobility, Vehicle Production, published in January 2025 – [0-3.5 t PC + LCV].



By creating unprecedented synergies between its Exterior & Lighting and Modules Business Groups and its dedicated software activity, OPmobility provides innovative exterior solutions for both its long-standing customers and new mobility players.

## THE NEW One4you OFFER TO DEVELOP CUSTOMIZED AND DIFFERENTIATED SOLUTIONS

### New challenges

Vehicle electrification, changing regulations and new consumer habits have led to major changes in production processes. Vehicle contents have evolved considerably, with more and more sensors, electronics and communication systems, while the number of versions of vehicles' various exterior parts has also increased. The ability to integrate assembled solutions combining exterior parts, lighting and modules is becoming increasingly important for both new players and long-standing manufacturers. This is also an opportunity for more creativity and visual differentiation.



QUESTIONS FOR...



### CHRISTIAN KOPP

Executive Vice President of OPmobility,  
President of the Exterior & Lighting  
Business Group

#### Why a global offer like One4you and why now?

The automotive market is undergoing an unprecedented transformation, driven particularly by growing electrification. Both new players and long-standing manufacturers have changed the way in which they produce vehicles. They are increasingly looking to combine technologies and find production solutions which are optimized in terms of cost, simplicity and lead times. This is a new source of innovation and growth for OPmobility.

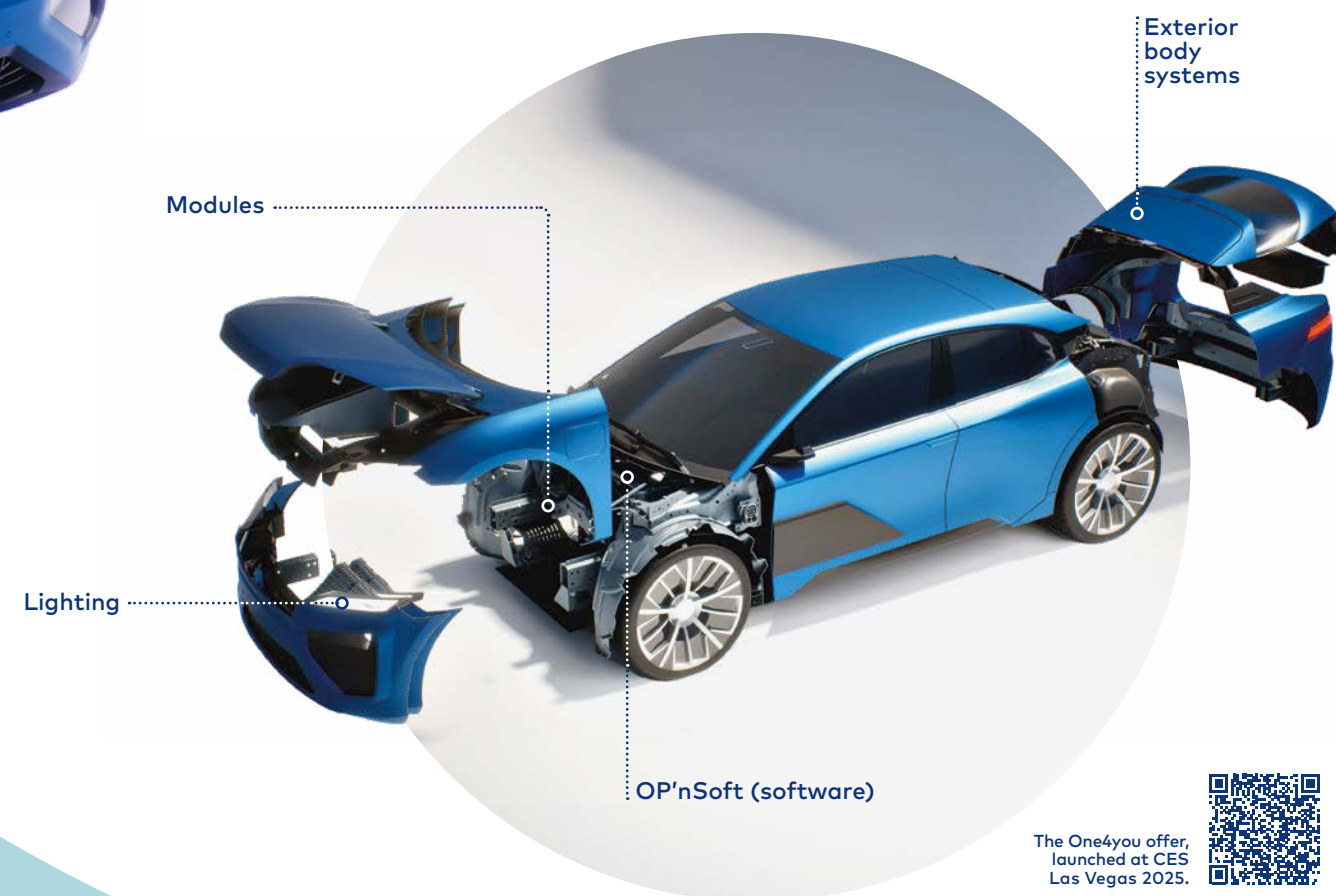
#### What is innovative about this offer?

One4you is of interest to manufacturers because this solution offers more than the sum of our

various parts. It enables us to work with our customers to develop creative, new and innovative solutions which make them more competitive. This all-in-one solution provides customized technological solutions with new design options, simplifying and accelerating our customers' production processes and ensuring operational efficiency and agility. Few companies are able to provide these kinds of solutions, both in terms of technologies and global presence.

#### What are the objectives?

One4you aims to increase the value per vehicle in the products we sell and secure new contracts, both with existing customers and new players. It brings us closer than ever to our customers.



The One4you offer,  
launched at CES  
Las Vegas 2025.



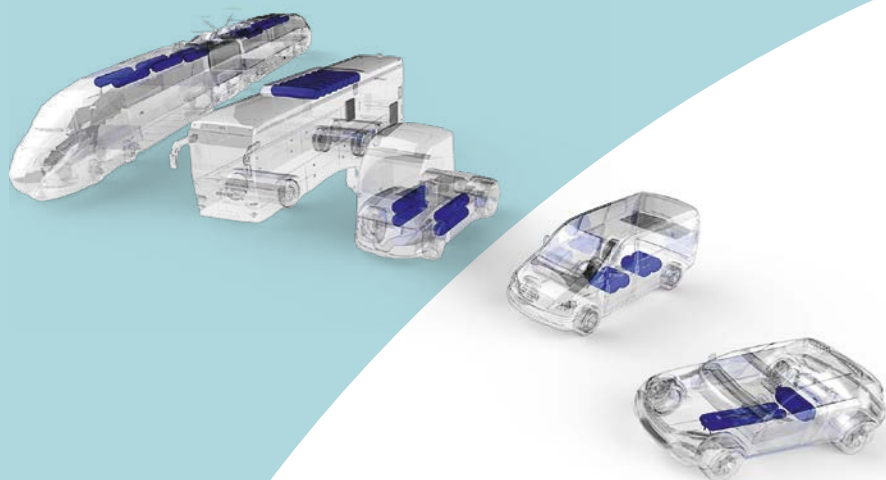


Thermal, battery electric, hydrogen:  
OPmobility's technology portfolio provides  
support for all mobility players.

## EXPERT UNDERSTANDING OF TECHNOLOGICAL DIVERSITY, A DISTINCTIVE ADVANTAGE

At OPmobility, we believe tomorrow's mobility will be multi-faceted and widely available, but only if all technological options are explored. What will the world's automotive fleet look like in 20 years? Although there will be lots more battery vehicles, we believe combustion engines will still be a reality, perhaps powered by alternative fuels. Hydrogen, which combines the advantages of an electric vehicle (no CO<sub>2</sub> emissions) and a combustion engine vehicle (extended range and rapid refueling), could therefore play an important role in the decarbonization of mobility, particularly heavy and commercial mobility.

The challenges of decarbonization require different approaches in different regions. OPmobility has therefore chosen to continue producing fuel tanks, maintaining its annual production of some 17 million parts for combustion engine, while investing in innovations for battery electric vehicles and hydrogen.



### New milestones for hydrogen in 2024: increased industrial capacities

OPmobility invested very early in hydrogen, beginning in 2015, and has adapted its solutions to the specificities of this promising energy carrier. In France and Europe, this strategy has enabled the Group to meet the needs of automotive manufacturers, including Stellantis and Hyundai Motor Company, and rail mobility players, such as Alstom and Stadler. The Group is responding to invitations to tender for heavy mobility in China and the United States, including invitations from Ford.

### Europe's biggest hydrogen vessels plant

In its brand new plant in Compiègne in France, the Group is launching production of high-pressure hydrogen storage systems for heavy and public mobility, near a former fuel tank. All employees on this historic site have been trained to manufacture hydrogen vessels. This is a wonderful example of a technological and people-centered transition. In 2025, OPmobility will launch production of high-pressure vessels for Hyundai in its South Korean plant in Wanjū.

x7  
between  
2026 and 2030:  
the expected  
growth of the  
global hydrogen  
mobility market

### The Last Man Standing strategy

In view of the decline of the combustion engine market, OPmobility is safeguarding its future with its Last Man Standing strategy: this positions the Group as a key partner for its customers, thanks to its expertise, its capacity, its operational excellence and its supply chain continuity. As such, in a consolidating market, the Group is adapting and plans to strengthen its position as the global leader by increasing its market share from 22% to 30% by the end of the decade.



New OPmobility plant to produce  
high-pressure hydrogen storage systems  
in Lachelle, France.



STRATEGIC PILLAR #2

# BALANCING our global presence

Today, Europe accounts for half the Group's revenue. While maintaining its long-standing European focus, OPmobility has committed to its international expansion by accelerating its development in North America and Asia. This is the second pillar of its strategy.

Within the new global landscape of mobility, OPmobility is strengthening its international presence in growing mobility markets, particularly the United States, China, India and South-East Asia.

In the United States, the Group has a network of 12 plants, the most recent of which was opened in Austin (Texas) in 2024; it supplies the leading electric vehicle manufacturer in America with front-end modules and cockpit modules.

With a well-established presence in China, including 37 plants and 5 R&D centers, the Group is ready to capitalize on opportunities with local partners, particularly in view of the growing momentum of the hydrogen sector. In India, a regional hub which brings together several of OPmobility's activities was opened in 2024 in Pune, in the state of Maharashtra, one of the country's biggest automotive hubs. Two new plants will also be added to the existing network.

OPmobility's strategy, focused on 3 pillars, including global diversification, presented in relation to the Group's annual results in 2024, by Laurent Favre.

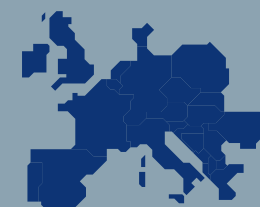


## NEED TO KNOW

The United States has become OPmobility's biggest market in terms of revenue. All Business Groups operate in the country.

A balanced  
order book

1 in 3  
orders received  
in Europe



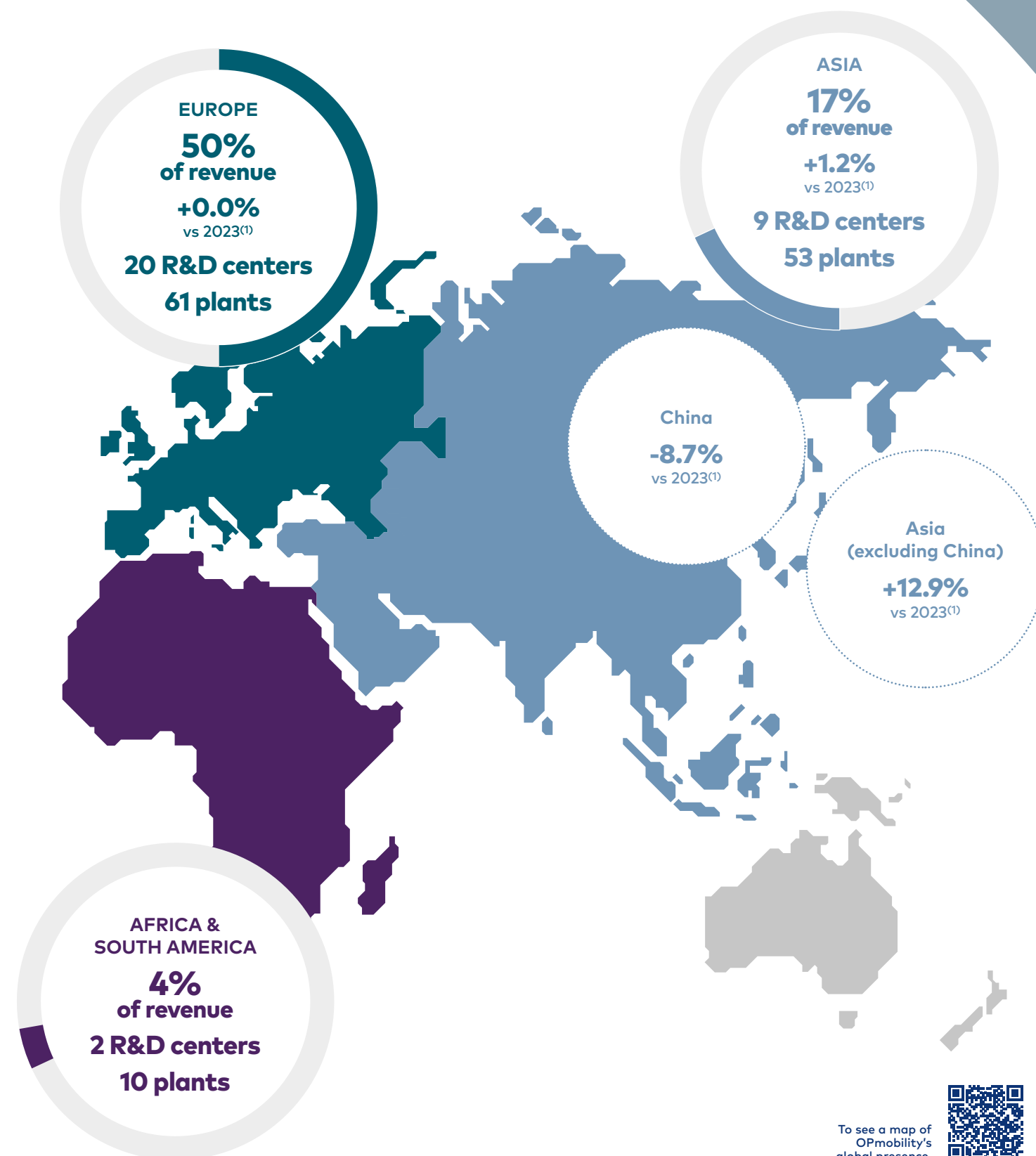
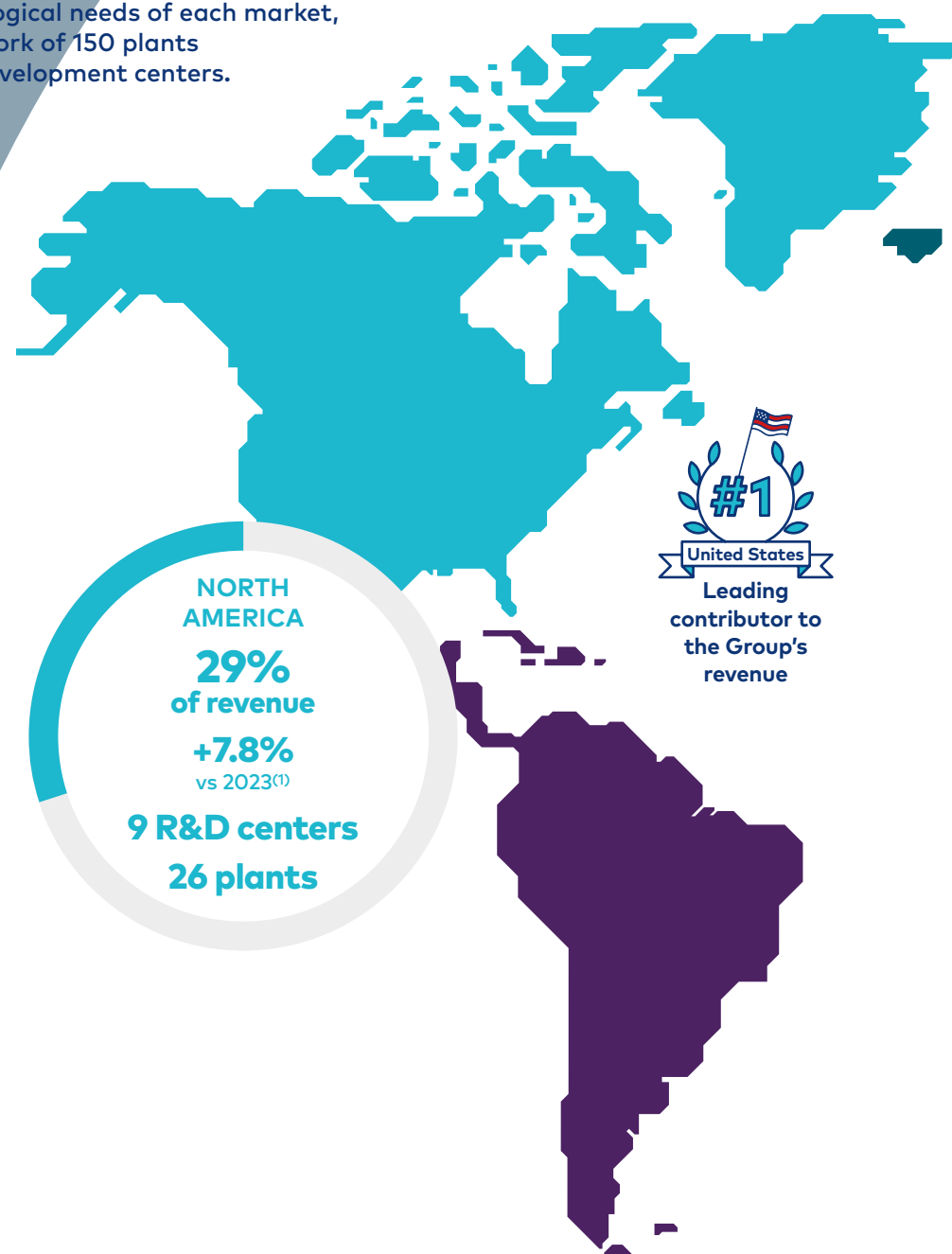
2 in 3  
orders received  
in the Americas  
and Asia





## OUR GLOBAL PRESENCE

OPmobility is a global group operating in 28 countries, at the heart of the world's major mobility markets. To support regional dynamics and meet the technological needs of each market, the Group has a network of 150 plants and 40 Research & Development centers.



(1) Constant scope and exchange rates

To see a map of  
OPmobility's  
global presence.





1/2

1 in 2 vehicles in India  
is equipped by  
OPmobility today

Operating in India since 2007, the Group continues to strengthen its local presence in this dynamic and promising country, which is both a global industrial player and a growing domestic market.

## TAKING ROOT IN INDIA WITH AN AMBITIOUS VISION TO SHAPE MOBILITY

As the world's third-largest automotive market and a growing industrial power, the Indian market offers exciting opportunities for growth, with GDP which grew by more than 7% in 2024 and a low level of individual vehicle ownership.

### One of OPmobility's leading regional hubs

To respond both to local demand and global market trends and support the development of automotive manufacturers operating in the country, OPmobility has already invested significantly in India, with 4 R&D centers and 4 plants in operation. In addition, we plan to open 2 other plants, including one in 2025. The opening of a new R&D center in Pune in 2024 was a milestone for the Group's operations in India. Pune is one of the Group's 3 existing regional hubs, along with Troy in the United States and Tangiers in Morocco, which bring together engineering teams from all 4 Business Groups at OPmobility.

### OPmobility in India



4 plants



2 plants under  
construction



4 R&D centers



More than  
**1,500** employees  
in the country's main  
automotive hubs

### A sustainable innovation hub

The Group's strategy in the country is supported by talented Indian engineers, growing demand and significant logistical capabilities. It is also aligned with the *Make in India* initiative launched by the Indian government, which aims to attract foreign investment and position the country as a leading industrial hub. The Group's ambition in India is not just to provide long-lasting, quality products to meet local needs, but also to improve our overall competitiveness in engineering and industrial production in all the Group's countries. The Group is confident that India will become a leading hub for technological innovation and sustainable mobility. In India, we want to develop hydrogen storage solutions, along with smart and lightweight materials, reflecting the country's commitment to more sustainable mobility. This strategy will make OPmobility a major player in the transformation of the Indian automotive industry.



### Two new state-of-the-art sites

The construction of a new 40,000 m<sup>2</sup> plant, the Group's biggest plant in the country, will make it possible to supply exterior body systems for the domestic automotive market. In total, nearly 500 new jobs will be created in one of the country's most important technological and industrial hubs. Opening in 2025, the site will eventually produce up to 1 million automotive parts every year. In addition, the new R&D center, designed for up to 600 engineers, is strengthening and combining the Group's research capabilities in lighting and exterior body systems.



In 2024, the United States became OPmobility's largest market and a key focus for the Group, which plans to double its revenue in the country by 2028, building on solid foundations.

## OPMOBILITY AT THE HEART OF AMERICA'S DYNAMIC MOBILITY MARKET

Having operated in the United States for almost 50 years, OPmobility is one of the country's leading mobility companies and has become a key partner of the "Big Three" (Ford, General Motors and Stellantis), for which it produces more than 50% of gasoline fuel tanks. The American market has evolved considerably and is very dynamic today. GDP per capita and the level of car ownership in the United States are almost double those of France. Focused on innovation, the United States is at the forefront of the mobility revolution, thanks to investors who are keen to support the increasing maturity of connected and autonomous vehicles.

In this competitive market, which is still dominated by combustion engines, OPmobility is able to support the development of all types of powertrain: thermal, hybrid, battery electric and hydrogen-powered. In addition, the majority of our activity, which is focused on exterior systems and models, is unaffected by changing trends in powertrains. With the opening of a new plant in Texas in 2024 to supply the country's leading electric vehicle manufacturer with modules, all the Group's Business Groups (Exterior & Lighting, Modules, C-Power and H<sub>2</sub>-Power) now operate on American soil. The Group therefore has the means to support its ambitious vision: OPmobility, which generates almost 16% of its revenue in the United States, aims to double its revenue in the country by the end of the decade. The Group intends to achieve this growth in the automotive sector and in other forms of mobility, including trucks and rail.

### OPmobility in the United States



12 plants



6 R&D centers



3,300 employees



16% of revenue

89%  
increase in GDP  
per capita in the  
United States,  
between 2014 and  
2024, compared  
to +46% in Europe



### In Austin, manufacturing excellence for the electric mobility sector

In 2024, OPmobility marked a major milestone in its American development with the opening of its first plant in Austin, Texas. This new module assembly plant was opened to fulfill a long-standing order with a major American player in electric mobility. Built in just a few months, the Texan site has already produced 100,000 modules since September 2023. With a capacity of 2.5 million modules (1.5 million front-end modules and 1 million cockpit modules) and more than 400 employees as of 2025, it will soon become the Group's largest plant in terms of revenue, expanding its activities to produce exterior body parts, such as tailgates.

QUESTIONS FOR...



### YOUSSEF SOUBA

Executive Vice President  
of OPmobility, President  
of the C-Power Business Group

#### What impact is electrification having on the Group's C-Power activity in the United States?

By 2030, electric vehicle penetration should reach 30%; this leaves a significant market share for combustion engines. At a time when our customers are reducing their gasoline engine engineering teams or redeploying them to focus on electric vehicles, we continue to offer a core range of key expertise in combustion engines which our customers are going to need. As such, we are ready to continue equipping thermal vehicles, including hybrid vehicles, while also targeting the electric market, via our e-Power battery activity.

"The combustion engine market still offers opportunities which we are ready to seize."

#### Are there any other opportunities?

Of course! The market is transforming and we are adapting, as we always have. For example, to equip hybrid vehicles, we are working on new concepts to create innovative pressurized tanks which are lighter and more competitive. And, to provide further opportunities for our manufacturing sites, we have also begun to diversify into new products, such as recreational vehicles, quads and underwater scooters, which operate with gasoline tanks. By 2027, this market alone will account for 500,000 vehicles.



# DIVERSIFYING our customer portfolio

In a mobility market undergoing a radical transformation, new players are emerging, notably in North America and Asia, and new opportunities are arising, particularly when it comes to decarbonized heavy and public mobility. OPmobility's third strategic pillar is focused on expanding the Group's customer portfolio to meet all mobility needs.

Today, long-standing manufacturers account for half of OPmobility's revenue. In a rapidly changing automotive market, the Group is implementing a strategy to provide an agile response to very wide-ranging customer needs. The challenge? Maintaining and developing our existing portfolio, while adapting our products and services to new players, particularly in North America and China, which are much more vertically integrated and which drive us to innovate, both in terms of our technologies and our practices. Moreover, OPmobility is looking beyond the automotive world to heavy mobility players, including leaders like Alstom and Siemens, and is developing battery electric and hydrogen solutions to support the sustainable transition of trains, tramways, trucks and buses.



OPmobility's strategy, focused on 3 pillars, including customer portfolio diversification, presented in relation to the Group's annual results in 2024, by Laurent Favre.



## NEED TO KNOW

**A strong portfolio  
of long-standing  
customers**

**Increased customer  
diversification**, including  
electric vehicle players  
in the United States  
and China

**Development in heavy,  
public and commercial  
mobility** (trucks,  
buses and trains)





In July 2024, Stadler chose OPmobility to equip its first hydrogen trains in Europe. This major contract, signed with one of the world's leading rail manufacturers, confirms OPmobility's technology leadership in a growth sector.

## LEADING RAIL COMPANIES ARE CHOOSING OPMOBILITY'S HYDROGEN SOLUTIONS

### The challenge of decarbonizing rail transport

Today, a large proportion of the world's rail networks are not electrified, including 95% of lines in the United States, 40% in Europe and 28% in China. At present, diesel-powered trains operate on these lines.

To decarbonize rail transport, operators are increasingly turning to hydrogen trains. Compatible with all kinds of lines, hydrogen trains do not require significant investments in infrastructure. And with considerable range and short refueling times, these trains are a powerful boost to the energy transition and offer major growth potential.

### OPmobility and hydrogen



**15** Stadler trains  
equipped by 2025



**8** 350 bar  
high-pressure storage  
systems per train,  
equivalent to  
**185 kg** of on-board  
hydrogen



### Combining energy storage and generation

In July 2024, OPmobility signed a contract with Stadler to equip 15 hydrogen-powered trains for use on regional lines in Italy. As a pioneer in hydrogen technologies, operating across the value chain of this energy source, the Group will also be responsible for the development and industrial production of 350 bar high-pressure hydrogen storage systems and 150 kW fuel cell systems. Featuring an optimized design, these compact systems include *NM12 Twin* fuel cell stacks from the joint venture EKPO<sup>(1)</sup>. To power the trains' electric motors, they will instantly generate electricity from hydrogen stored in the tanks and oxygen in the air. What's more, these hard-wearing systems will stand up to intensive use. This is just the beginning: in addition to the 15 trains which will be equipped by 2025, OPmobility plans to expand its deliveries in the coming years. With a strong order book and increased manufacturing capacity in Europe and Asia, we are ready to respond to our customers' growing needs which will characterize the transformations which lie ahead.

(1) EKPO Fuel Cell Technologies is a joint venture between ElringKlinger (60%) and OPmobility (40%).

### OPmobility hydrogen systems on board Chinese tramways

With its joint venture PO-Rein, OPmobility signed a contract in 2024 with the world's leading railway manufacturer, CRRC (China Railway Rolling Stock Corporation Limited), becoming the first technology partner to sell its high-pressure storage technology for rail mobility. The contract covers the delivery and commissioning of 76 type 4 high-pressure storage systems, a leading technology in terms of quality and performance. These systems will be used in the latest-generation smart tramways which provide public transport in the city of Kuching in Malaysia. These autonomous tramways can transport more than 300 passengers and do not require any specific infrastructure: they follow a route defined by a virtual track on the ground. Hydrogen-powered, they take just 10 minutes to refuel, have a range of 245 kilometers and can reach a top speed of 70 km/hour.



The latest trends and innovations at OPmobility in the rail market, presented at InnoTrans 2024.



# COMMITTED TO THE FUTURE OF MOBILITY

Tomorrow's mobility will be sustainable. In 2022, OPmobility merged its People and Sustainability departments, recognizing that new generations – from employees and customers to consumers and citizens – expect companies to take greater social, societal and environmental responsibility. As a company which is committed to and a firm believer in decarbonization, OPmobility works closely with its stakeholders and its employees.

# A COLLECTIVE COMMITMENT to ambitious sustainable development targets



OPmobility has organized its various commitments within a global program, ACT FOR ALL, which is central to the Group's performance and excellence. Designed to engage all stakeholders, this ambitious program is based around 3 strategic pillars: Act for People, Act for Planet and Act Responsibly. Performance indicators are monitored regularly and assessed annually, reflecting the Group's social, societal and environmental ambitions.

## OPmobility takes an active role to help its employees and its stakeholders



Safety, diversity and equal opportunities are priorities for the Group and it is committed to protecting the health and working conditions of its employees. This is reflected in various initiatives, including Top Safety Visits, which are key opportunities to talk with employees about their workstations to help identify potential inherent risks, and the 6 non-negotiables (6 essential safety rules). OPmobility is also committed to promoting diversity within its teams, including the recruitment of more young people and women. Lastly, the Group actively supports initiatives which benefit local communities; in December 2024, it provided financial support for the rebuilding of two schools in Valencia, Spain, after devastating local floods.



The Fr2<sup>(1)</sup> is **0.56**<sup>(2)</sup>



**148** OPmobility sites reported zero accidents in 2024



**+1,200** interns and apprentices

## OPmobility is a responsible company



As a responsible and locally involved company, OPmobility focuses on the fundamentals of ethics, human rights, the fight against corruption, a Code of Conduct and responsible procurement.



E-learning about the Code of Conduct



E-learning about anti-corruption

## OPmobility is committed to preserving the planet for future generations



OPmobility strives to reduce the environmental impact of its activities by implementing its roadmap to carbon neutrality and its Top Planet program. This includes improving the energy efficiency of its sites and producing and purchasing renewable energy. In 2024, OPmobility also launched its ACT FOR ALL Climate School, an internal training program on climate issues. In addition, the Group works actively to preserve biodiversity and ensure the environmentally friendly design and recyclability of its products.



**900** employees completed ACT FOR ALL Climate School training in 2024



## Recognition for ESG initiatives



**A**

Best score for the second year in a row



**82/100**

Among the top 1% of companies assessed



**AA**

Among the sector's top 10%



**C+**

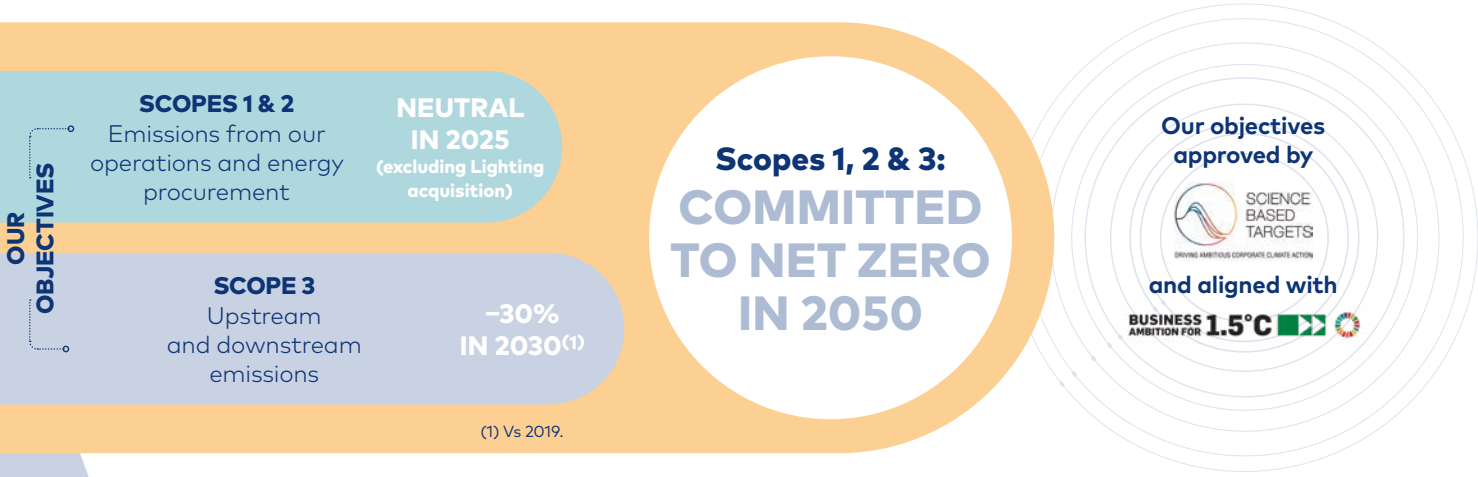
Among the sector's leaders

(1) Accident frequency rate with and without lost time. In number of accidents per million hours worked.  
(2) All entities and joint ventures.

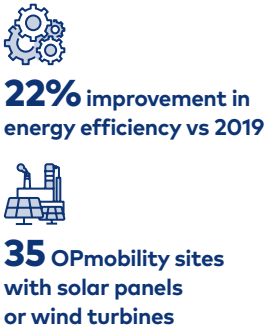
# DECARBONIZATION, ambitious objectives and a clear roadmap

Mobility produces more than 20% of global CO<sub>2</sub> emissions. OPmobility has a long-standing commitment to the proactive decarbonization of all its activities. Having set itself ambitious targets, the Group is continuing its efforts, balancing the challenges of transformation and the need to remain competitive, while involving all its stakeholders in this transition.

**OPmobility aims to be carbon neutral across its entire value chain by 2050.**



**Scopes 1 & 2 emissions**, which cover OPmobility's activities and for which the Group is directly responsible, account for approximately 1% of its CO<sub>2</sub> emissions. The objective? Reducing the use of fossil fuel energy with green energy and offsetting residual emissions. To do this, the Group's sites are working to improve their energy efficiency and produce renewable energy. Green energy supply contracts (PPAs<sup>(1)</sup>, VPPAs<sup>(2)</sup> and certificates) supplement our sites' decarbonized electricity requirements. Residual emissions are offset by carbon credits from certified projects. The Group's sites are committed to optimizing their processes; when possible, a part of the gas system is converted to an electric system. Sites can use self-generated renewable energy (solar or wind turbines) or purchase renewable electricity under long-term energy supply agreements, including PPAs.



(1) Power Purchase Agreement.  
(2) Virtual Power Purchase Agreement.

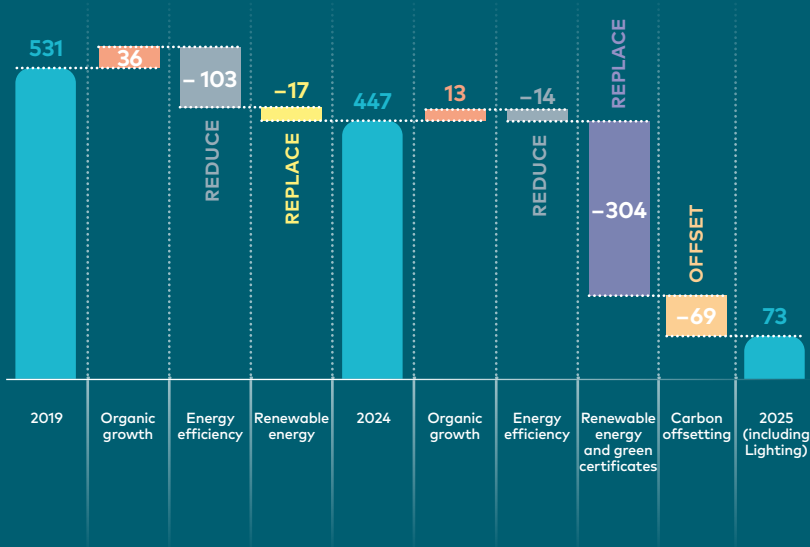


**Scope 3** emissions comprise upstream and downstream activities: upstream activities, including suppliers and the logistics chain, account for 12% of OPmobility's CO<sub>2</sub> emissions. Downstream activities, which cover emissions during product use and end-of-life, account for 87% of emissions. With regard to upstream activities, OPmobility has provided training for its suppliers on the issues around decarbonization and is committed to helping them decarbonize their activities. In 2024, 270 measures were identified to reduce the carbon footprint of the Group's suppliers. OPmobility's product strategy is to equip a growing number of low-carbon vehicles, which contributes to lower CO<sub>2</sub> emissions during their use. The Group's solutions for lighter, more aerodynamic and recyclable parts also contribute to the reduction of scope 3 emissions from downstream activities.

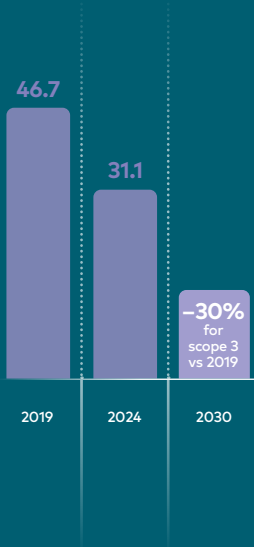
**Digitalization, certification, sharing best practices, innovation and circularity: the cornerstones of the Group's sustainable performance**

By implementing advanced digital solutions on its sites, OPmobility can accurately measure its energy consumption and constantly optimize performance. The Group is also actively working towards ISO 50001 certification which will ensure more efficient energy management and reduce the environmental impact of its plants. Sharing best practices plays a vital role in the transformation's acceleration. By pooling skills, expertise and innovations and by promoting a collaborative approach, the Group is accelerating the implementation of efficient solutions for a more sustainable industry. The Group's committed approach is also reflected in the design of its products. Vehicle aerodynamics are directly influenced by the parts used, particularly bumpers and tailgates. OPmobility has also integrated the circular economy into its activities by exploring the reuse of automotive plastics from end-of-life vehicles.

**SCOPES 1 & 2**  
Roadmap implementation 2019-2025  
— In ktCO<sub>2</sub>e



**SCOPE 3**  
Roadmap implementation 2019-2030  
— In MtCO<sub>2</sub>e



# AN OPTIMAL workplace environment

In the constantly changing mobility sector, the commitment and motivation of the Group's talented workforce are vital to ensure the success of its growth strategy. OPmobility has developed an ambitious Human Resources policy for its 38,900 employees.

## People and Culture: the values at the heart of our corporate culture

As a family-owned company for 80 years, OPmobility has developed a strong corporate culture which the Group shares with all its employees, all over the world. In 2023, the Group defined its Leadership Model, based on OPmobility's corporate culture and DNA. Organized around core skills and directly inspired by our corporate values, the Leadership Model was rolled out in 2024 among leaders and all managers and engineers.

## Human Resources: business partners

In the rapidly changing mobility sector, the Group's Human Resources teams work closely with our 4 Business Groups. This proximity to operational activities facilitates the development of rewarding career opportunities and makes it possible to anticipate the Group's future needs for skills, particularly when it comes to Artificial Intelligence and software. OPmobility has laid the foundations for its OPUniversity, organized around two main areas of focus: professions and departments on the one hand and geographic regions on the other, with OPUniversity sites planned in America, Europe and Asia.



An average of **20** hours  
of training per year and  
per employee



**25%** female  
engineers and managers



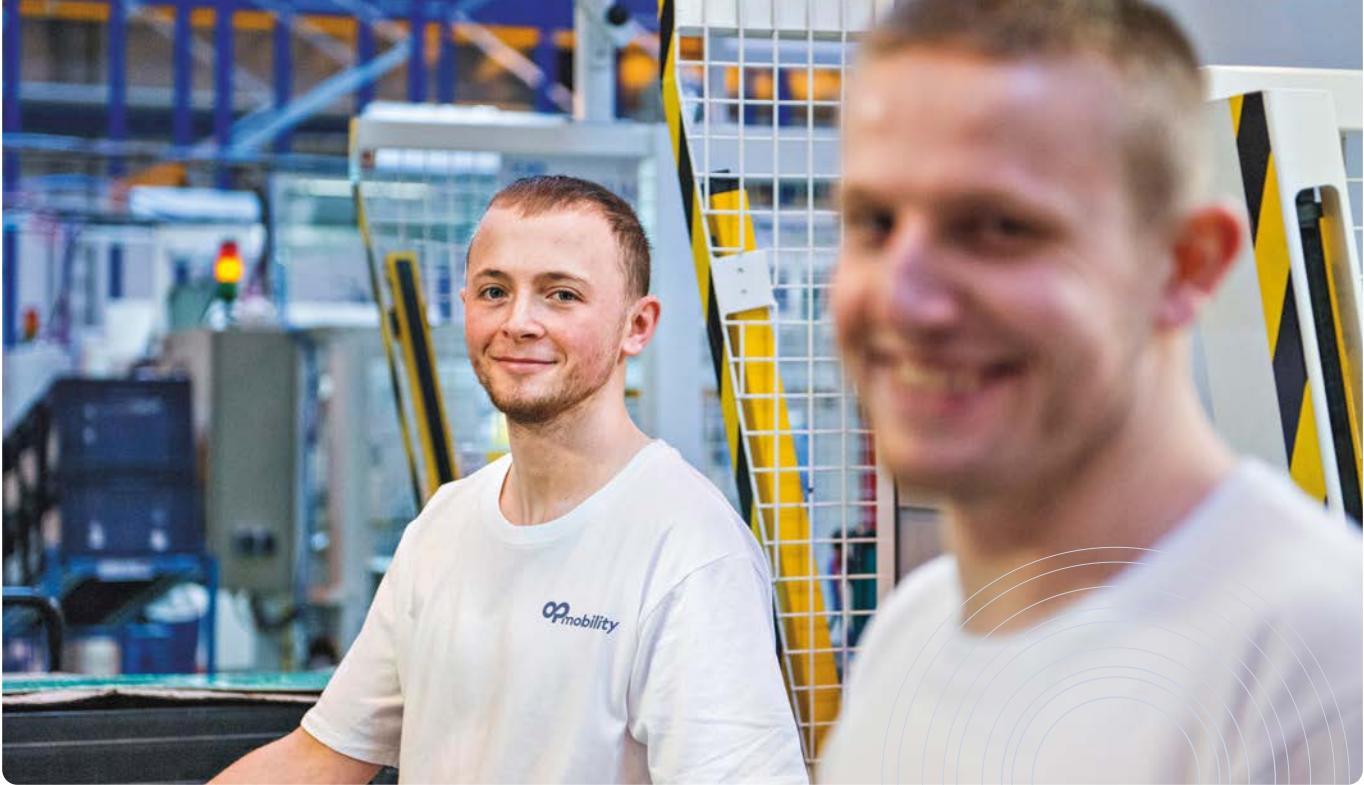
**31%** women in the  
Group's workforce



**1,288** interns,  
apprentices and VIE

### Powerful values behind our purpose

- ▶ We are passionate about what we do
- ▶ We feel responsible for future generations
- ▶ We dream big and deliver
- ▶ We trust each other
- ▶ We take risks to explore new opportunities



## An employee experience which builds loyalty

OPmobility offers its employees a unique experience, providing long-term skills development opportunities throughout their careers. On arrival, new employees are given a personalized digital induction. To encourage internal mobility, the Group standardizes job descriptions to facilitate career changes between its 4 Business Groups. The Group also offers attractive compensation and benefits, including its Group-wide maternity and parental leave policy. The maternity leave policy provides for a minimum of 16 weeks, while the parental leave policy provides for 5 weeks more than applicable local regulations.

## Digitalization and pooled resources to improve efficiency

Digitalization ensures the rapid and robust homogenization of relevant data for the Group's Human Resources teams, as they focus on front-line issues and employee needs. In addition, the Group has developed programs to centralize its support functions at national and regional levels for a cross-functional approach to benefit the Business Groups. When it comes to key areas such as training and recruitment, on-site Human Resources teams are therefore supported by regional expertise hubs.



**923**  
employees recruited  
in 2024



**35%**  
internal mobility



An average  
of **9.5** years  
of service



# SUPPORTING our workforce

International careers, skills development, diversity at all levels of the organization... OPmobility supports its workforce throughout their careers.

"OPmobility's CHARGER program is an excellent training course which is preparing me for future managerial roles."



**Sébastien Courtois**  
Sales Manager,  
H<sub>2</sub>-Power, France

**Having started at OPmobility in January 2018, I joined H<sub>2</sub>-Power,** the hydrogen-focused Business Group, as a Sales Manager in 2022. As a team, we develop hydrogen storage and conversion activities for several mobility applications, including buses, tow tractors and trains. I was delighted to join the CHARGER program, a training course which prepares managers for senior positions. The program is very diverse and comprehensive:

leadership, management, finance, communication, personal development and more. We covered a wide range of the company's different roles. Thanks to the program's unique exercises, I've strengthened my managerial skills, improved my ability to take a step back in complex situations and significantly expanded my internal network. All these insights and skills will help me better understand the intrinsic challenges of tomorrow's mobility."



**Mailys Le Tinier**  
CAPEX Buyer  
in VIE, C-Power,  
United States

**In May 2024, I moved to Detroit in the United States to work as a CAPEX Buyer for the C-Power Business Group.** I had thought about working abroad for several years: in the United States, I work in a genuinely multicultural environment, alongside colleagues from Argentina, Mexico, Brazil and Canada. Working near Detroit, the heartland of the automotive industry,

is an incredible adventure for me as a buyer: purchasing processes are vital in what is an extremely dynamic automotive sector. Today, it's my job to purchase the production machinery needed to manufacture fuel tanks in our American plants. In the future, I would be open to another role abroad, probably in Mexico!"

"My time in America has helped me grow professionally and broadened my horizons."



**Emma Jones**  
Quality Director,  
Exterior & Lighting,  
United Kingdom

**I began working as a quality engineer before being promoted to Quality Director** for Western Europe for the Exterior & Lighting Business Group. In practice, my role involves overseeing the quality of our operations, development and supply in several countries. I spent the last six years working for OPmobility in France, before returning to the United Kingdom, where I'm from. At every stage

of my career, I've seen how our teams' diversity has enabled us to identify risks much more accurately and make the right decisions as a result. That's absolutely vital in our industry, given the way in which mobility is transforming in response to the challenges of climate change."

**"Together, diversity makes us more efficient because it encourages creativity and opens up new perspectives."**



**Emma Jones**  
Quality Director,  
Exterior & Lighting,  
United Kingdom



**Rafael Sanjurjo**  
Project Manager,  
C-Power, Spain

**I'm a project manager at the Arevalo plant in Spain and I've spent my entire career at OPmobility:** 29 years in total. When I look back on the last 29 years, I realize how deeply I care about this Group: it has helped me grow professionally and supported me through the different stages of my career within the C-Power and Exterior Business Groups. Innovation and agility are probably the two

words which best describe OPmobility. They enable us to implement innovative projects, such as the installation of solar panels here at our plant, a team project I'm particularly proud of."



**"A 29-year career at OPmobility... dedicated to innovation and excellence."**

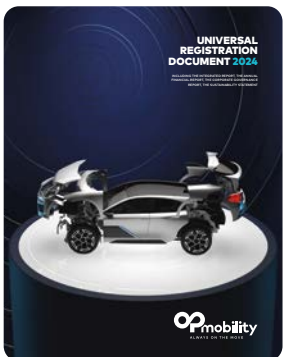
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Registration Document**



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LET'S SEE  
WHAT THE FUTURE HOLDS.



**Plastic Omnium** is now **OPmobility**. Mobility is central to our society. With innovative technological solutions, **OPmobility** is inventing a safer, more sustainable, more affordable and more engaging mobility. New energies, new expectations, new possibilities: tomorrow's challenges are real. **OPmobility** is here to meet them.

ALWAYS ON THE MOVE