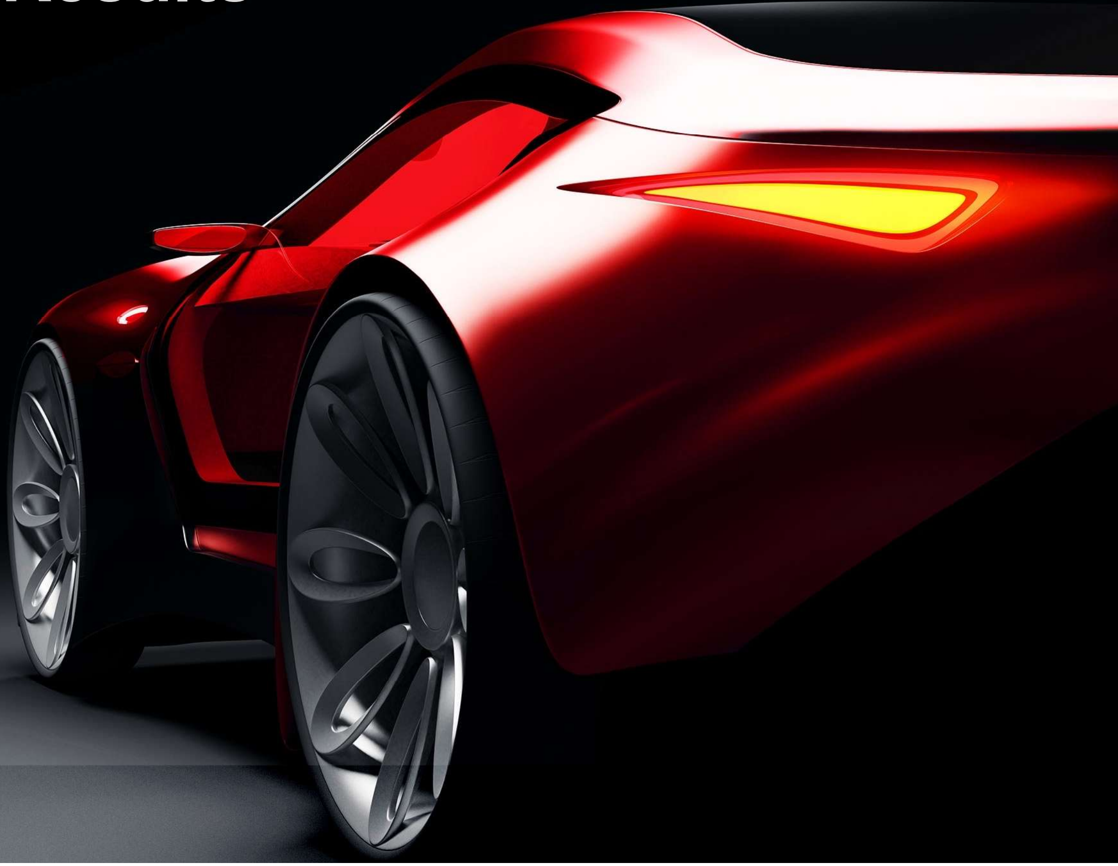
Auto Partner Group Financial Results

H1 2026



17 September 2026

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Agenda

1. **About the Auto Partner Group**
2. **Market environment**
3. **Financial results**
4. **Summary**

About the Auto Partner Group

Management Board

Aleksander Górecki
President of the
Management Board/Founder

Involved in the automotive industry since 1993, the year he founded Auto Partner. Major shareholder. Responsible for the company's development since its inception. His remit also covers managing relationships with key suppliers and business partners.

Andrzej Manowski
Vice President of the
Management Board

With the company since 1994, serving as Vice President of the Management Board since 2007. Responsible for the company's geographical expansion, including the development of export operations, as well as oversight of IT projects.

Piotr Janta
Vice President of the
Management Board

Joined the company in 2009 as Sales Director and has served as a member of its Management Board since December 2015. Oversees the development of the sales network and marketing communications. Active in the automotive sector since 2005.

Tomasz Werbiński
Member of the Management Board,
Chief Financial Officer

Chief Financial Officer since 2019 and a member of the Management Board since December 2022. Oversees the company's finances.

Auto Partner Group at a glance

One of the largest distributors of automotive parts in Poland, with a nearly **10% market share**

International markets accounting for **around 53% of sales**

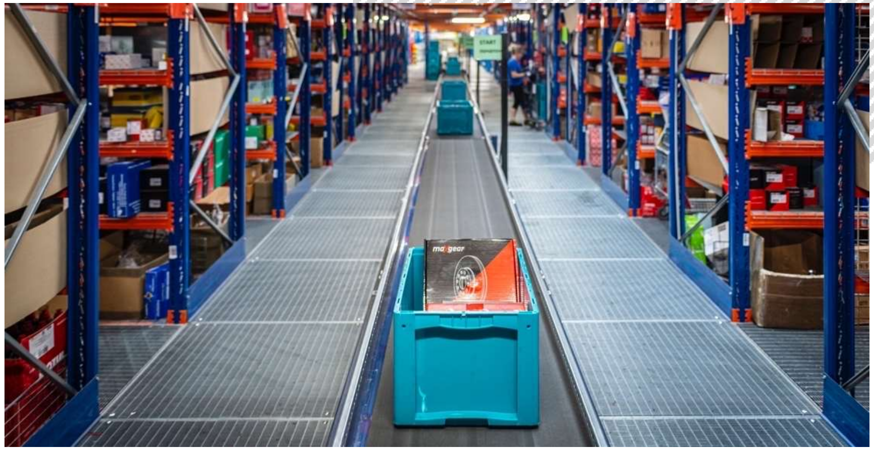
Over **350,000 product references** available

Expanding distribution network with nearly **200,000 m^2** of warehouse space

Strong private labels (including **maXgear**), contributing around 17% of sales

Network of over 560 **MaXserwis** affiliated workshops

Member of **GlobalOne** purchasing organisation



Successful business model – Poland

SUPPLIERS OF FINISHED PRODUCTS

private-label brands including **MaXgear**

other brands

broad product range
premium brands, private-label brands

AUTOPARTNER

human resources
almost 2,700 employees

sales

sales support

warehouse/logistics

IT

export

deliveries to branches

online orders

115 branch offices

local warehouse

deliveries to customers

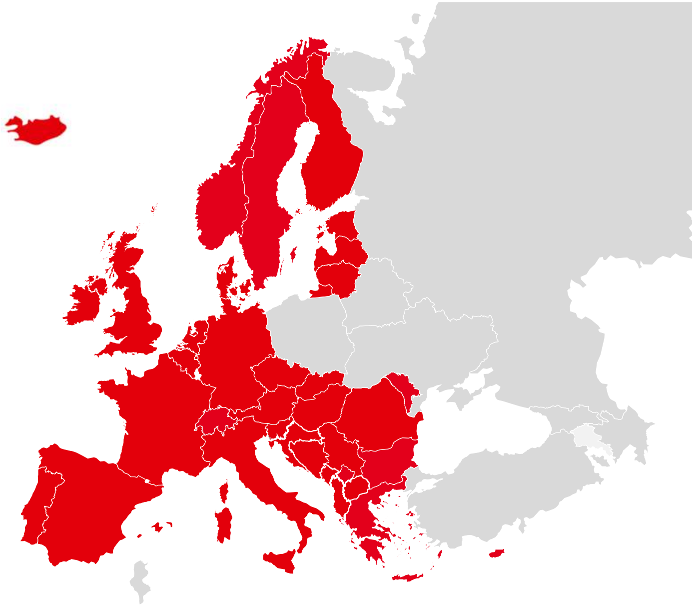
CUSTOMERS

Approximately 70% of orders in Poland placed online

Repair workshops	**61%**
Specialised stores	**32%**
Non-specialised repairers and retailers	**7%**

As at 30 June 2026

Successful business model – exports



SUPPLIERS OF FINISHED PRODUCTS

private-label brands including **MaXgear**

other brands

broad product range
premium brands, private-label brands

AUTOPARTNER

human resources
almost 2,700 employees

sales

sales support

warehouse/logistics

IT

online orders

Approximately 99% of international orders placed online

partnerships
and representative offices

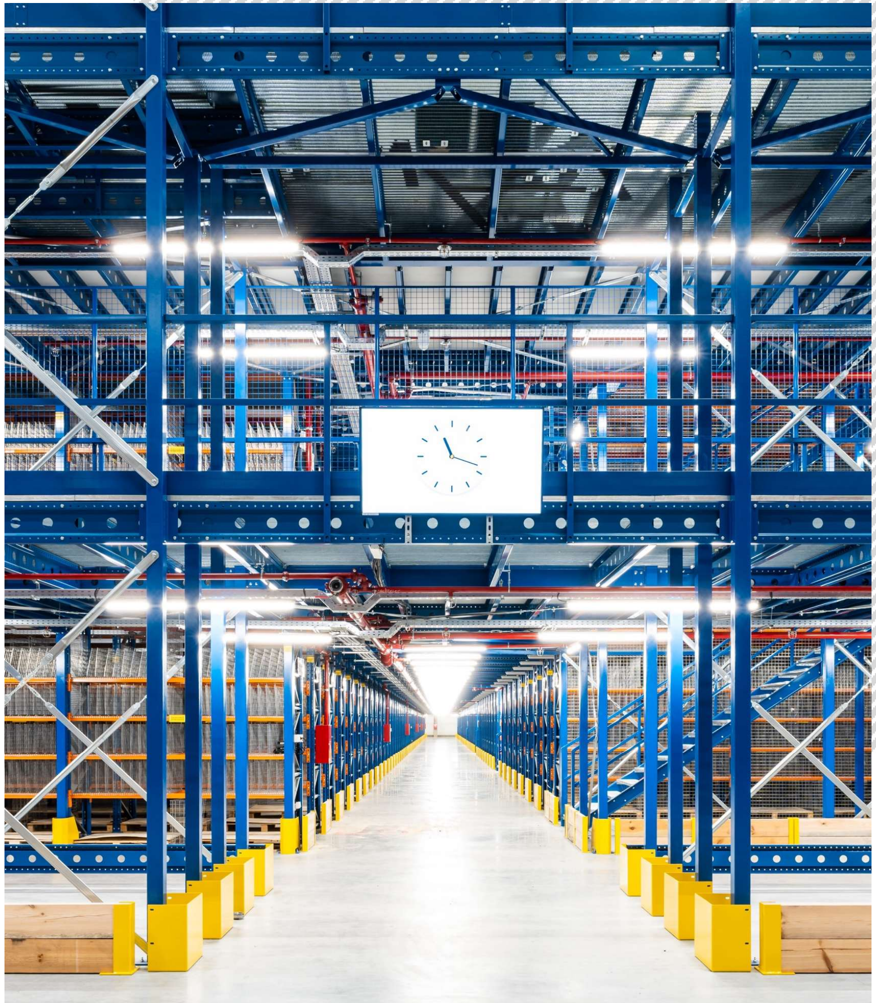
CUSTOMERS

Stores, wholesalers and distributors **100%**

As at 30 June 2026

Key developments in H1 2026

- **Sales up 11%** to nearly **PLN 2.46 billion**, with record first-half revenue
- **Growth** recorded both in Poland **(up 6.7%)** and in international markets **(up 15.2%)**
- **Solid profitability** and rapid business growth: gross profit margin of **28.6%** in H1 2026 and **29.3%** in Q2 2026
- **Continued international expansion**, with exports accounting for close to **53%** of total revenue
- **Zgorzelec** distribution centre now **fully operational**
- Agreement signed in September 2026 to establish a **logistics and warehousing centre in Germany**, offering approximately **24,300 m²** of space



Well-developed distribution network

IT-supported logistics, enabling just-in-time deliveries to geographically dispersed customers, with a frequency of

2–8 times per day

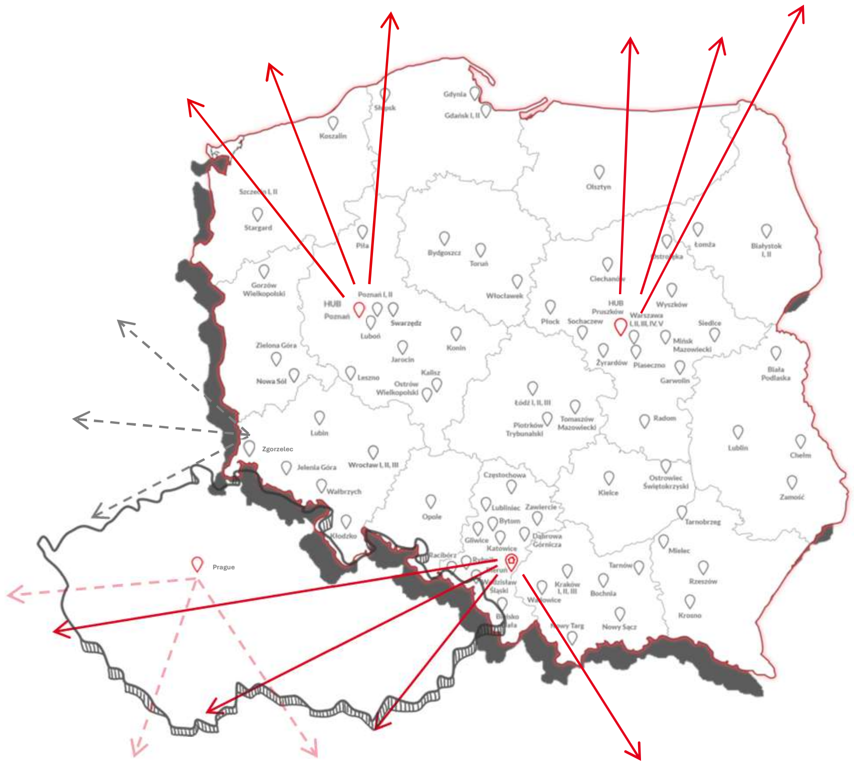
Domestic and export sales handled from the central warehouse in Bieruń, distribution centre in Pruszków and the Poznań HUB

Network of

115 branch offices

covering all regions of Poland

Subsidiary operating **two branch offices in the Czech Republic**



Expanding warehouse space

52,000 m²

Distribution centre in Bieruń

12,500 m²

Warehouse in Pruszków

13,500 m²

Logistics and distribution centre (HUB) in Poznań

5,000 m²

Warehouse in Germany

24,000 m²

Warehouse in Mysłowice

57,000 m²

Local warehouses within **115 branch offices**

33,000 m²

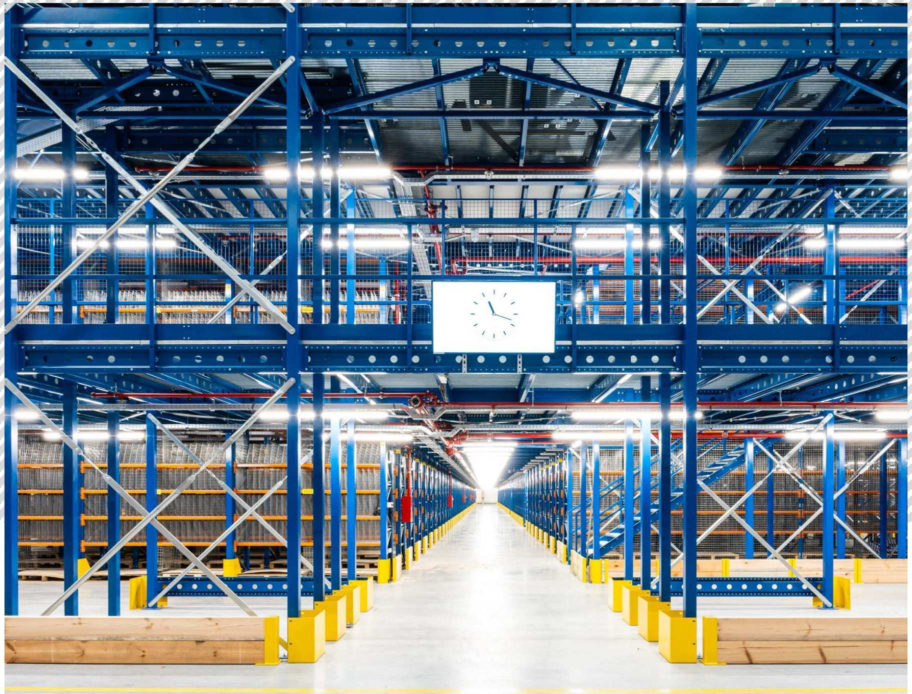
Distribution centre in Zgorzelec

1,200 m²

2 branch offices in Prague, Czech Republic

Zgorzelec distribution centre now fully operational

- Full operational readiness reached in Q2 2026
- The Group's second-largest and **most technologically advanced** logistics and warehouse facility
- The largest investment in the Group's history, adding **33,000 m²** of warehouse space – an increase of ca. **30%** (excluding local branch warehouses)
- **Strategic** location near the German border, **strengthening capacity for export sales** to Western European markets



Highly **automated logistics processes**

2 sorters, each with a maximum capacity of **3,500 parcels per hour**

Capacity to handle about **50 vehicles** simultaneously – dispatch of up to **200 pallets** at the same time

Private-label brands and exclusive brands contributing 17% of revenue

Private-label brands

maxgear

over **35,000**
reference products available

19
years of experience

80
product groups

Car and motorcycle parts

ROCKS

2,000
products available

10
years of experience

Workshop equipment: tools and power tools

Exclusive brands

quaro

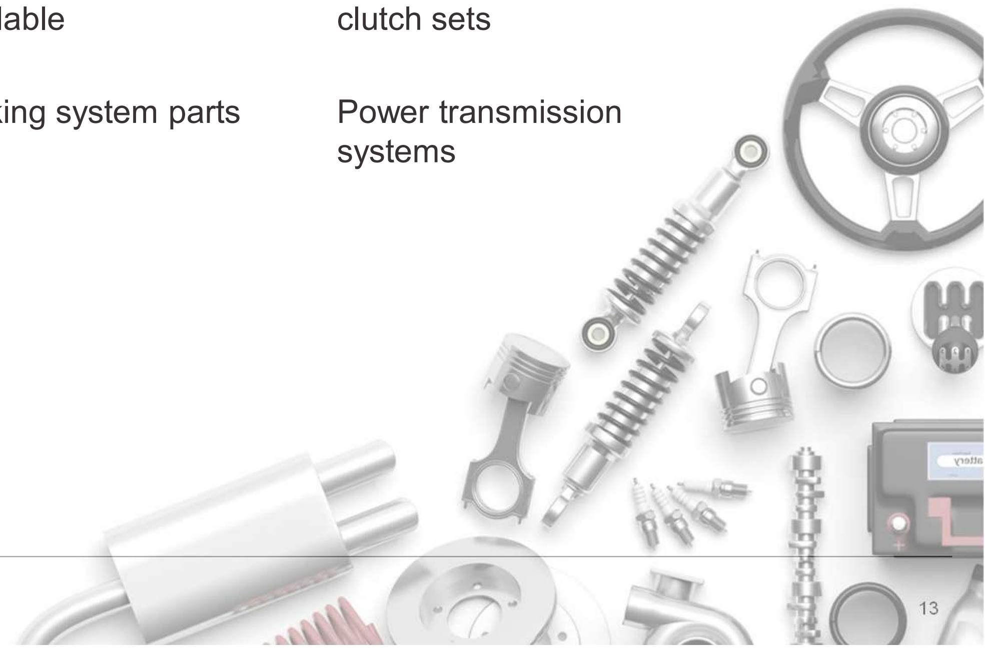
over **3,500**
reference products available

Braking system parts

RYMEC

over **2,000**
different applications for clutch sets

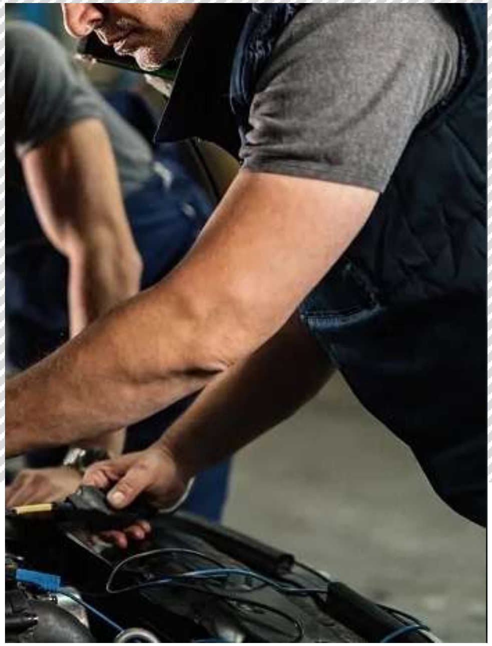
Power transmission systems



Expanding proprietary workshop network

Network of
over 560
MaXserwis
affiliated **workshops**

Plans of major
network
expansion
in 2026



Market environment

Market environment

POLAND

- **560** vehicles **per 1,000 inhabitants** in Poland (ACEA)
- In H1 2026, **the number of new passenger car registrations rose** by **9.4%** year on year (KPMG/PZPM)
- **Average age of a passenger car**: **15.2 years** (ACEA)
- In June 2026, the average price of used passenger cars was approximately PLN **50.7** (AAA Auto)
- **Unemployment rate recorded** at the end of June 2026: **5.8%** (Statistics Poland)
- **GDP in Q2 2026**: **3.9% year on year** (Statistics Poland)

EUROPE (European Union)

- **570** vehicles **per 1,000 inhabitants** in the European Union (ACEA)
- In H1 2026, **new car registrations in the EU increased** by **5.7%** (ACEA)
- According to ACEA, in H1 2026, **new electric vehicles accounted for 20.7%** of the total EU market
- **Average age of a passenger car in the EU**: **12.7 years** (ACEA)
- EU **unemployment rate** was **6%** in June 2026 (Eurostat)
- **EU's GDP in Q2 2026**: ca. **1.2% year on year** (Eurostat, estimated data)

Registered passenger cars

297,690,892

passenger cars registered in 29 European countries at the end of 2024

Source: Eurostat, 2024 data

Financial results

Strong H1 2026 results

REVENUE

2,458.9

PLN million

+11.0%

EBITDA

245.7

PLN million

+46.7%

EBIT

212.4

PLN million

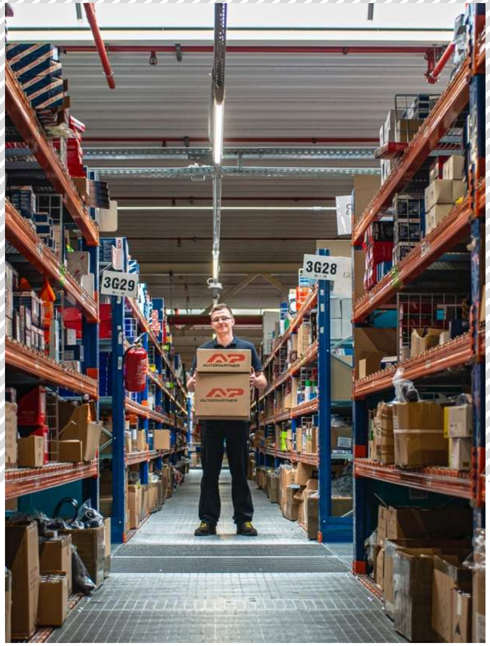
+53.5%

NET PROFIT

156.2

PLN million

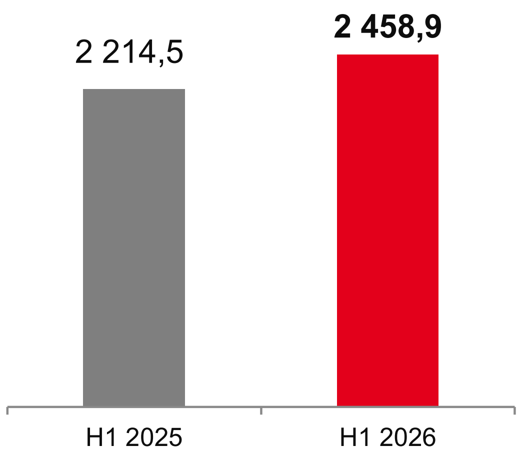
+60.8%



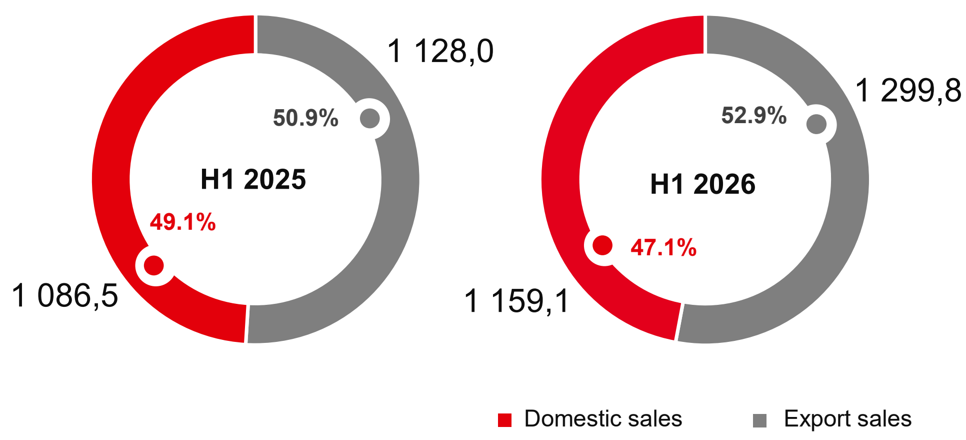
Strong sales growth in H1 2026

- Revenue **up 11.0% year on year**
- Export sales accounting for a larger share of total revenue than domestic sales
- Key drivers supporting sales growth:
  - effective pricing policy
  - product mix expansion
  - better alignment of the product mix with customer needs across different price segments
  - Zgorzelec distribution centre becoming fully operational

H1 2026 sales (PLN million)

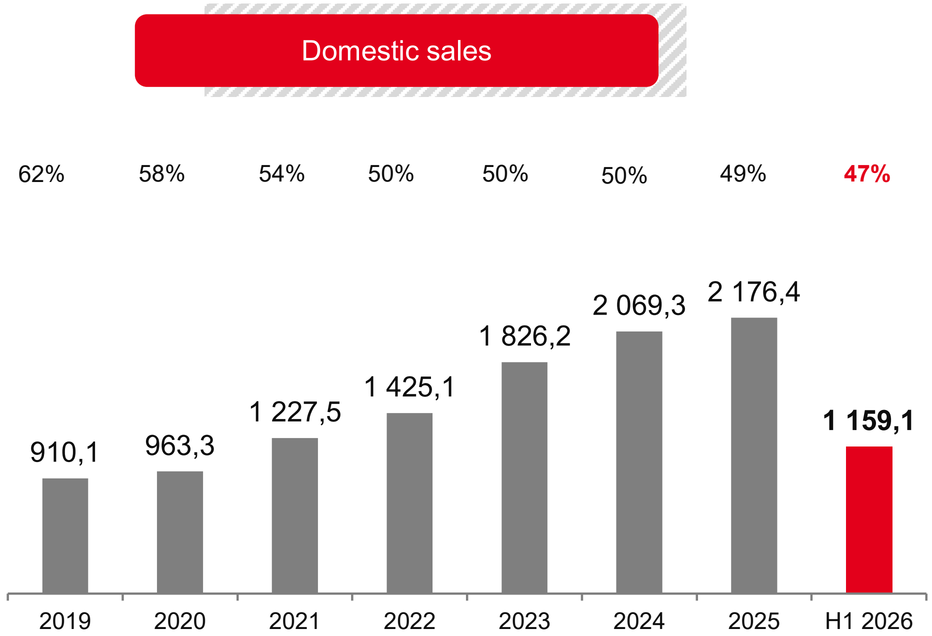


Sales by geography (PLN million)



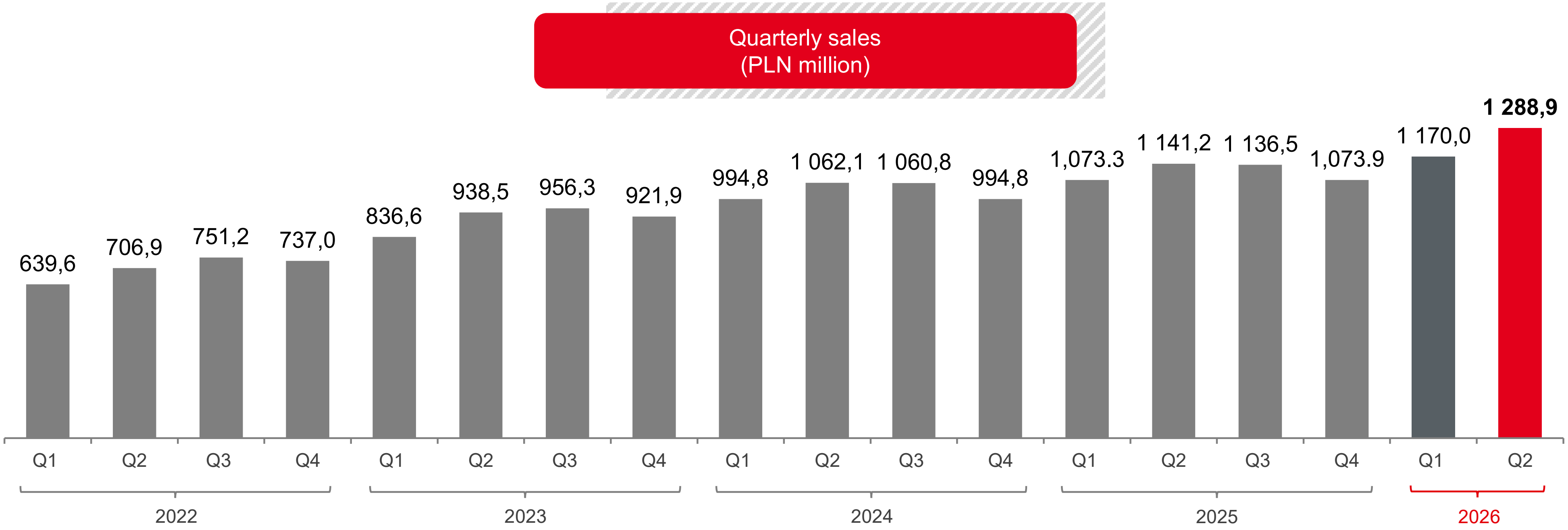
Strong domestic and export sales

- Export sales **up 15.2% year on year**
- Domestic sales **up 6.7% year on year**



Continued business expansion

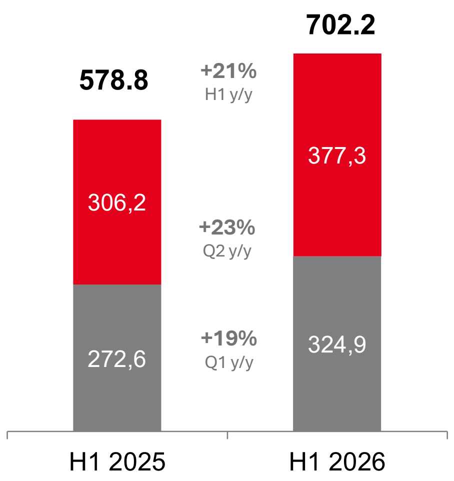
- Record revenue of nearly PLN 1.29 billion in Q2 2026 – **the strongest quarter in the Group's history**



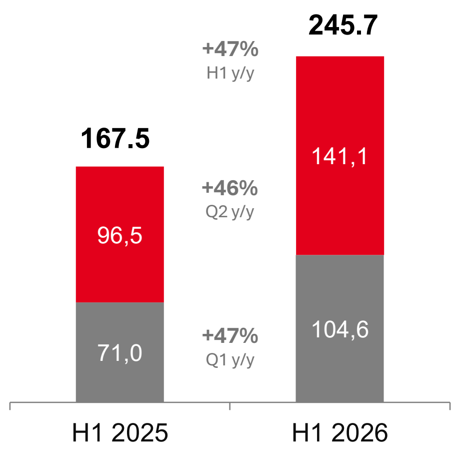
Solid profitability

- Gross profit margin rose significantly to 28.6% from 26.1%, driven by:
  - inflationary pressures, particularly those arising from the situation in the Strait of Hormuz, including significant price increases by suppliers of automotive oils
  - an increase in the average EUR/PLN exchange rate over the period
- Operating costs grew broadly in line with revenue growth, supported by strong cost discipline, efficient deployment of human resources and continued investment in process automation
- Net profit increased by 60.8%, additionally supported by lower finance costs following the year-on-year decline in WIBOR rates

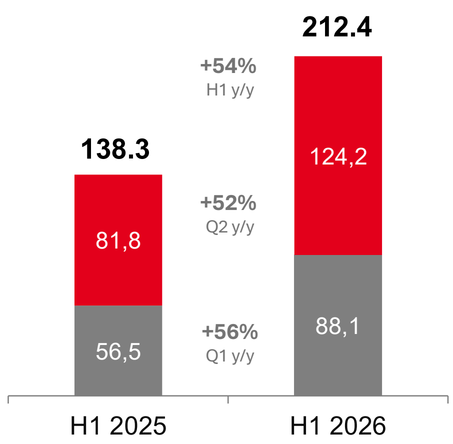
Gross profit (PLN million)



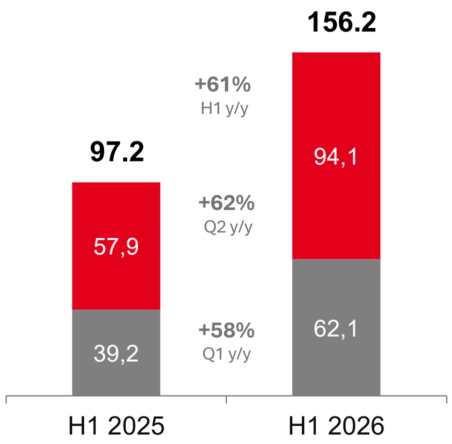
EBITDA (PLN million)



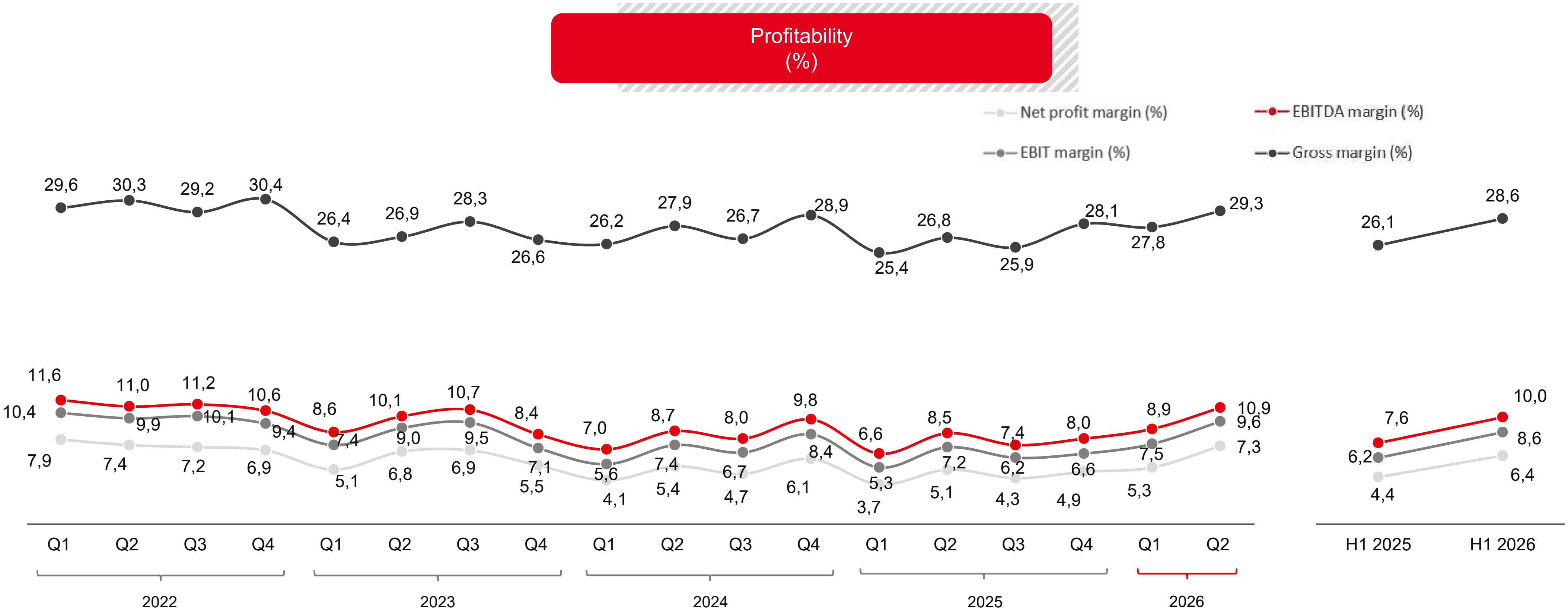
EBIT (PLN million)



Net profit (PLN million)

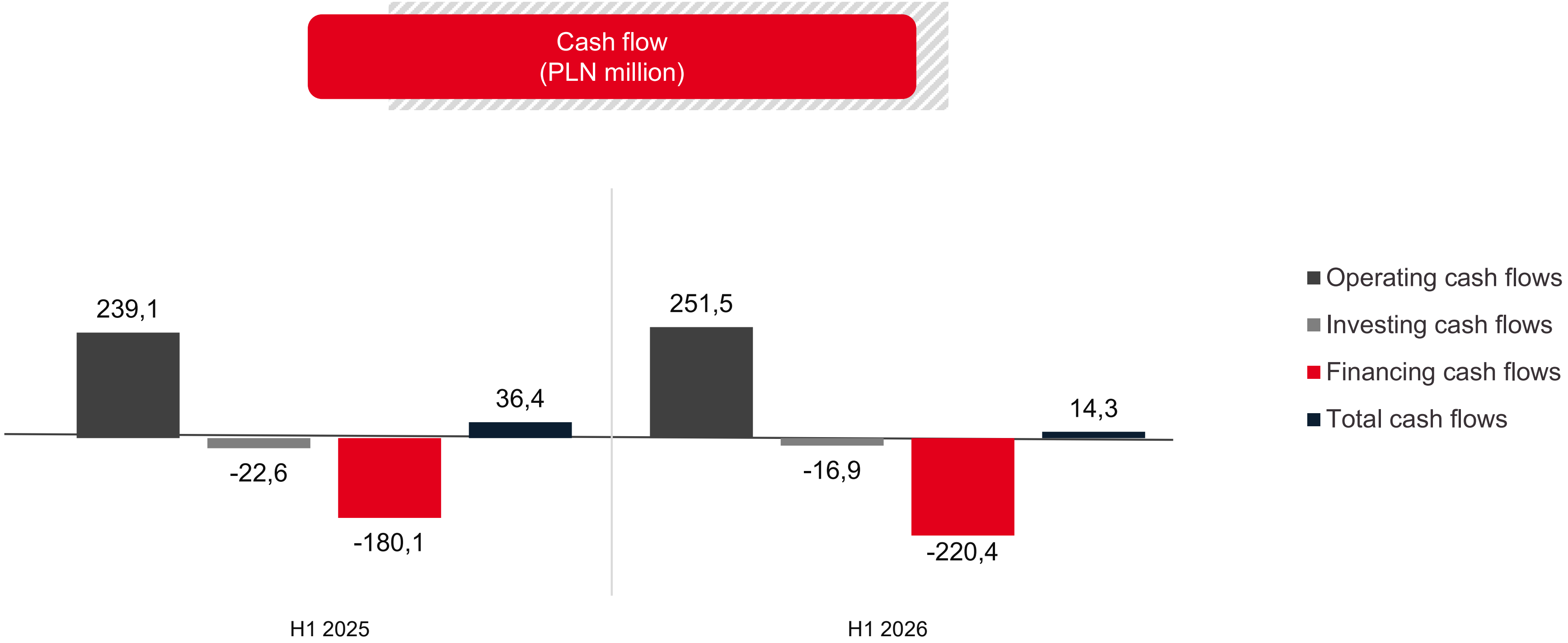


Profitability growth achieved in a volatile market environment



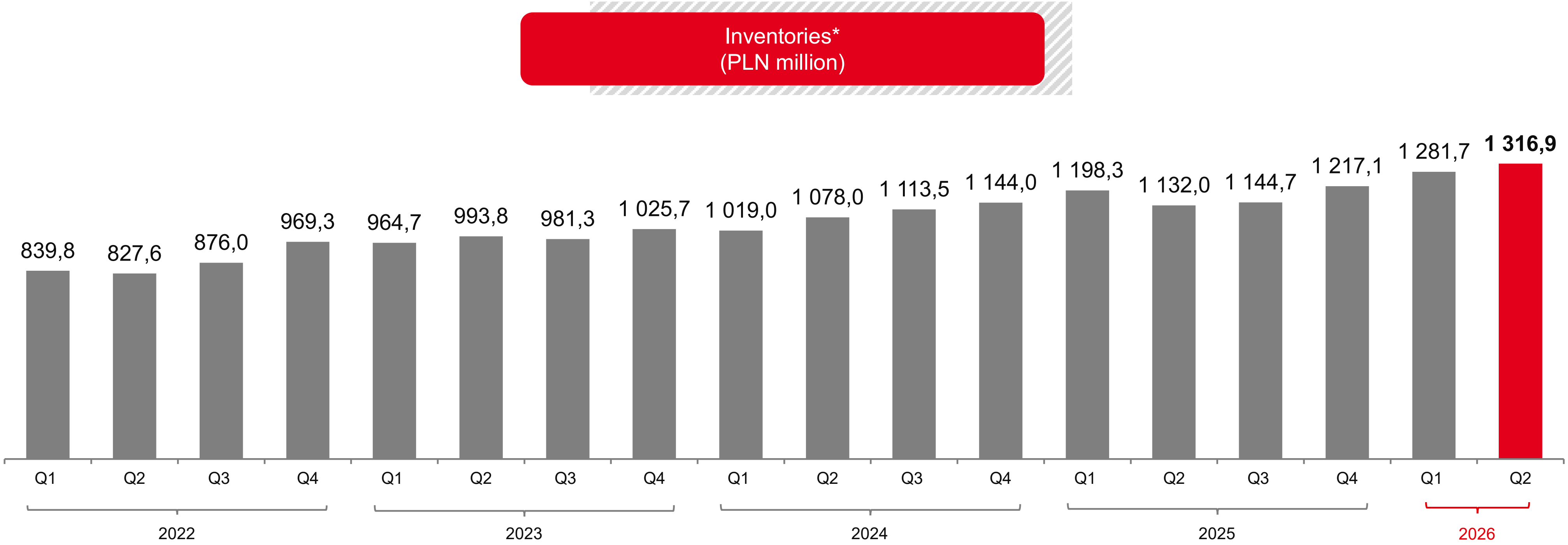
Cash flow

- Stable liquidity position of the Group



Stable inventory levels

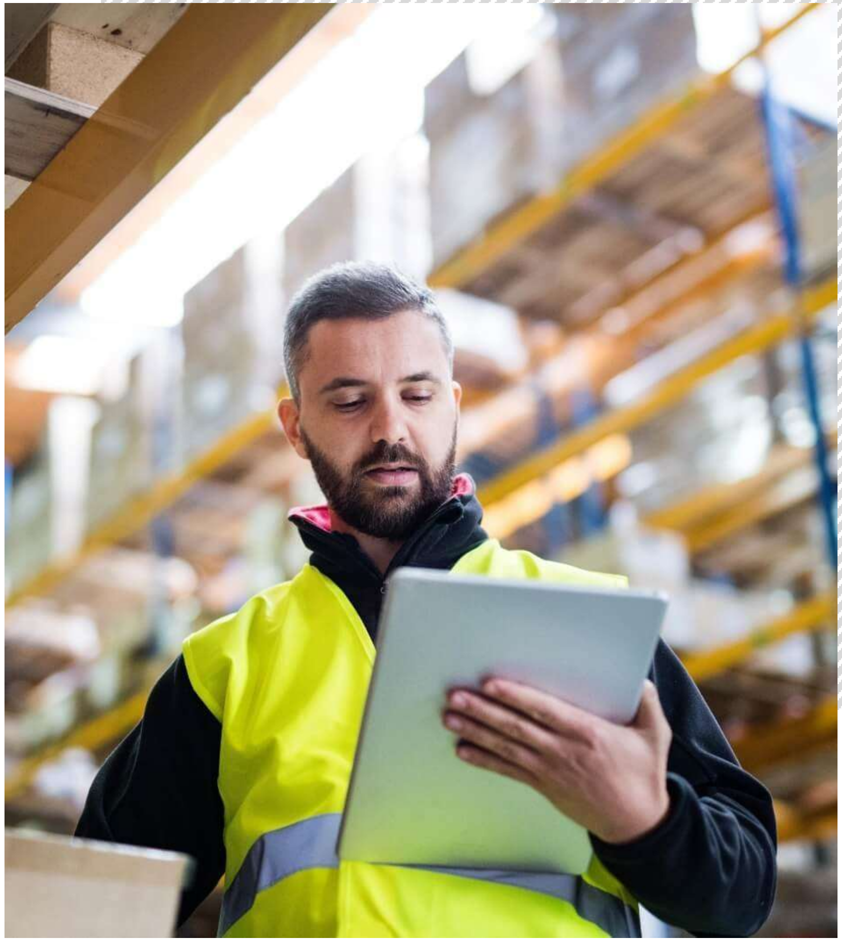
- Strong inventory turnover: **131 days** vs **126 days** the year before (as at 30 June 2026)



** Inventories and right of return assets*

Summary

Summary



- **Record** H1 2026 **revenue** of **PLN 2.46 billion**
- Significant **improvement in profitability**
- **Low debt** level (net debt / EBITDA = **0.9x**)
- **Positive outlook** for the automotive parts distribution market
- **Strong cost discipline** and investments in **process automation**
- **Continued business expansion**
- **Zgorzelec** distribution centre now **fully operational**
- Agreement signed in September 2026 to establish a **logistics and warehousing centre in Germany**, offering approximately **24,300 m²** of space

AUTOPARTNER

THANK YOU!

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