Gestamp

Second Quarter 2013 Results

September 5, 2013

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Presentation of Second Quarter 2013 Results

Francisco J. Riberas Mera, President & CEO
Francisco López-Peña, Vice President & CFO
Richard Egües, Director of International Financing

Key Events - Highlights

Gestamp continues to execute according to plan, achieving targeted milestones and demonstrating good results despite a soft market in Europe

- Mitsui transaction has closed, with subscription occurring end of June and funding of the € 297 million equity investment received in the first week of July
- Second quarter revenue and EBITDA demonstrated increases vs. Q2 2012, within expectations and reflecting:
  - Evidence of market stabilization in Europe
  - Healthy market dynamics in many other geographies
- Sound results despite the dragging effect of several plants which are in ramp-up phase or under construction
  - Construction on Puebla II in Mexico and Dongguan in China progressing according to plan (Dongguan already beginning to produce)
  - Ramp up continuing as expected in West Virginia, Shenyang, Chongqing, Santa Isabel in Brazil, Louny in the Czech Republic, Chennai in India, Kaluga II in Russia, and now in Edscha Kunshan (Edscha's new plant in China was inaugurated on August 30, 2013)
- Expectation is for subsequent quarters to reflect continued stabilization in Europe

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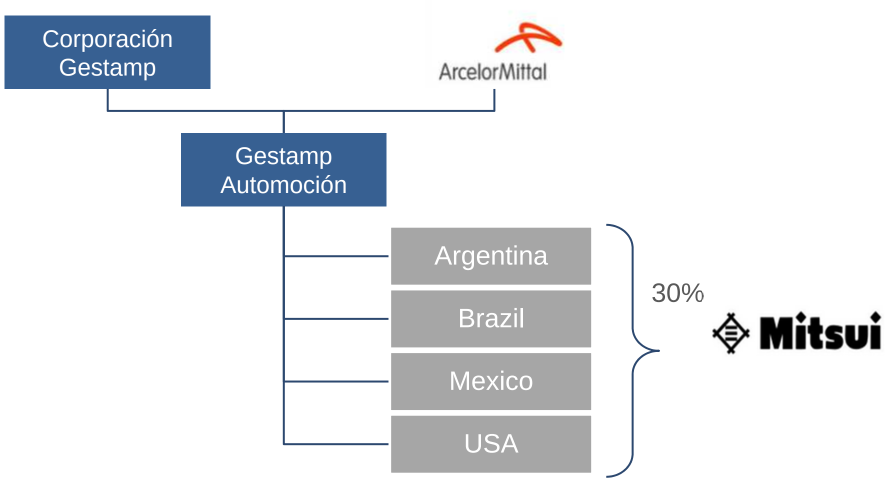
Recent corporate developments

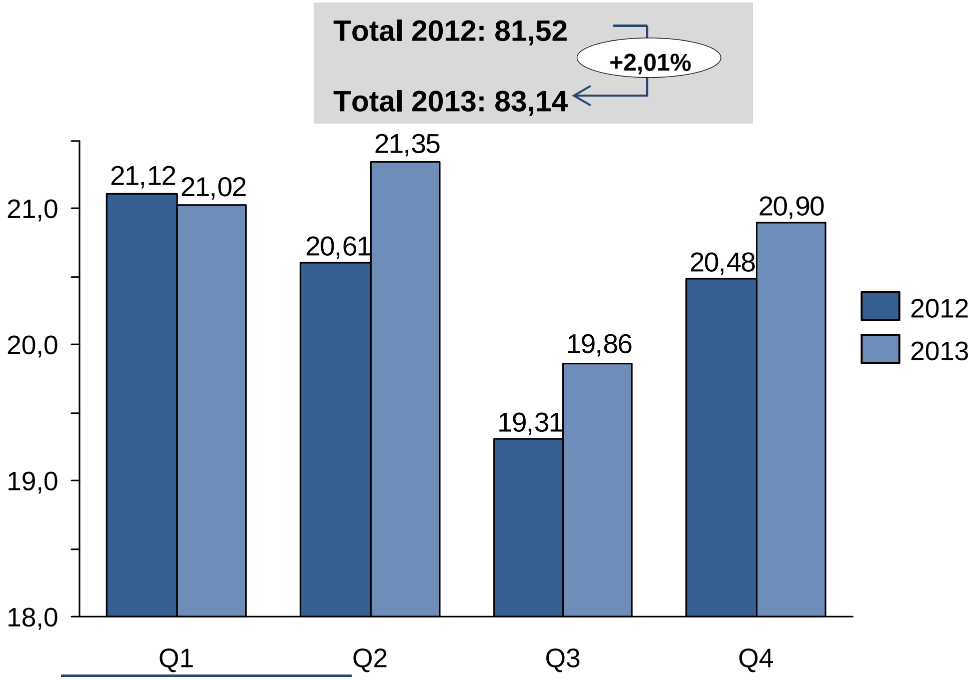
- Mitsui transaction has closed, with subscription occurring end of June and funding of the € 297 million equity investment received in the first week of July
  - € 297 million in liquidity has entered the group from the sale to Mitsui of a 30% stake in each of our American subgroups by way of a capital increase
  - Strategic collaboration vis-à-vis Japanese OEMs has begun and is expected to boost Gestamp's already promising advances in our Japanese OEM strategy



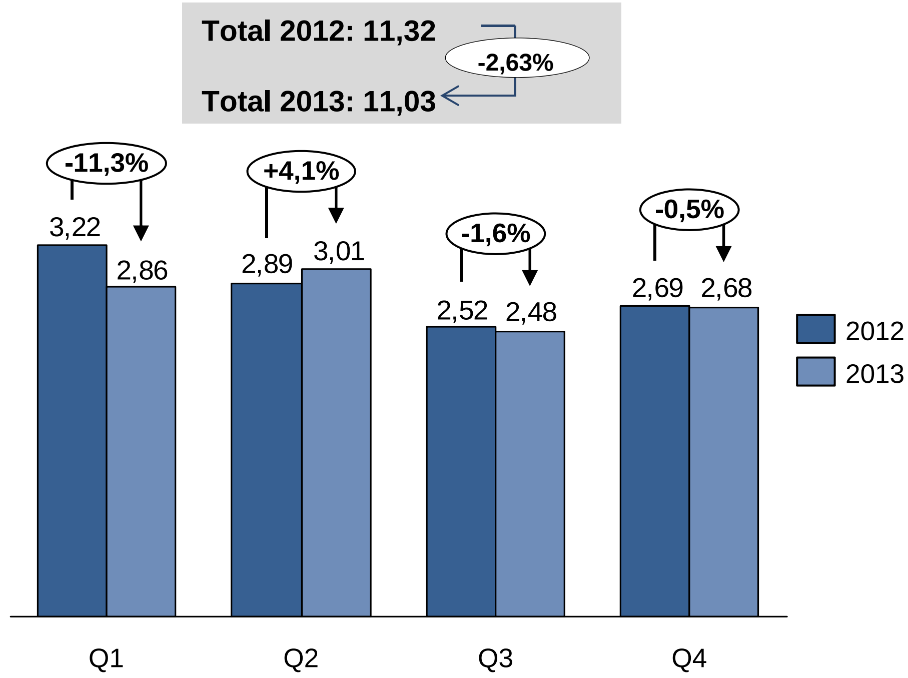
- In June, Gestamp repurchased the minority stake held by Cofides in our Mexican operations
- As previously indicated, on June 14 we agreed to exercise our call option to purchase the 49.06% minority stake in GMF Holding for € 104 million (the "Liberty Option"); today we are effecting the purchase, also as indicated previously

Industry Production Volumes

Global Production



Western European Production (*)



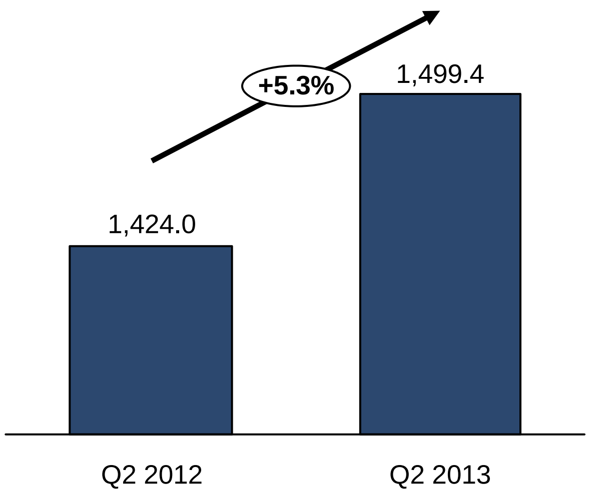
Source: Independent third party

(*) In Gestamp countries of operations

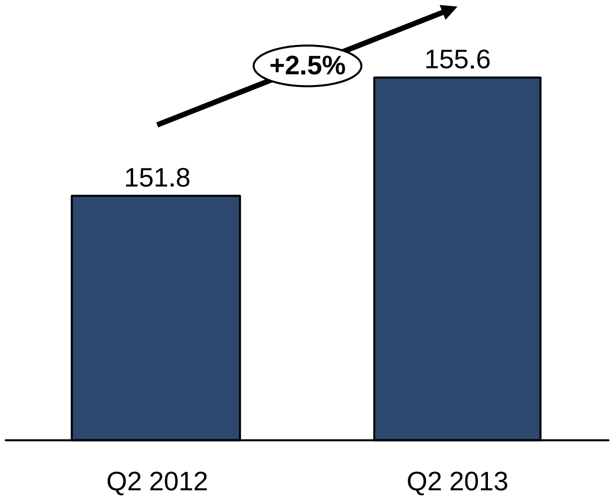
- Market volumes in Western Europe for the second quarter of 2013 were higher than in Q2 2012
  - After the marked decline of the first quarter, the market stabilized somewhat in Q2 2013.
  - Market data point to continued stabilization in the remaining half of 2013
- Production volumes in other regions, on the other hand, were more robust in Q2 and market data point to a continuing trend during the remaining quarters of 2013

Revenue and EBITDA growth

Revenue



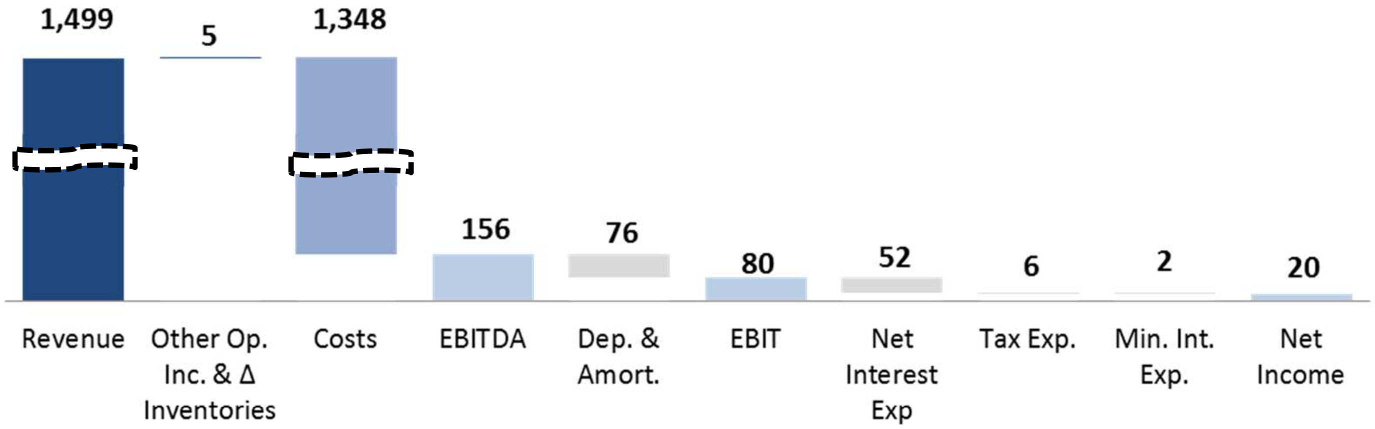
EBITDA



- Revenue increased vs the comparable quarter in 2012 primarily due to increased sales in Europe, in the Americas and in China, while sales in other regions were at levels similar to the prior year
- EBITDA for the quarter was 2.5% higher than Q2 2012, driven by higher sales but reflecting the negative impact of the high number of projects in ramp up
  - Plants in ramp-up phase and under construction affect EBITDA margin, given the front-ending of costs as revenues ramp up to achieve full production
- Results were in line with budget, although EBITDA was negatively impacted by approximately € 2.75 million in comparison with Q2 2012 due to the strong Euro, with net adverse movements in exchange rates principally vs. the Brazilian Reais, the Argentinian Peso and Sterling

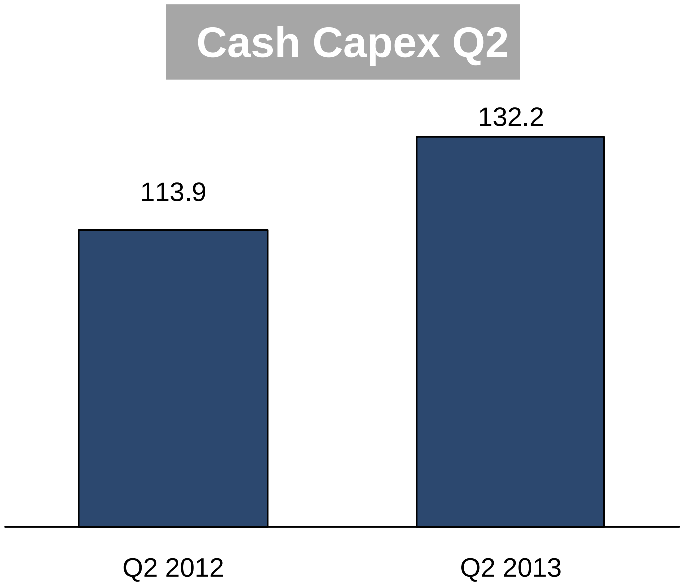
Performance in Q2 2013

Breakdown of P&L, second quarter of 2013



- Revenue of € 1.5 billion generated EBITDA of € 155.6 million, EBIT of € 79.6 million and a net income of € 19.8 million for the quarter
- Costs reflect increased personnel expenses largely due to increases in the Americas and in Asia – regions which experienced both growth in production volume as well as the effects of additions to personnel during the ramping up of activity in new production sites
- Financial expenses reflect not only an increase in average net debt in the second quarter of 2013 compared to the second quarter of 2012, but also extraordinary expenses arising from the early repayment and restructuring of existing financing facilities (e.g., unwinding of upfront financing fees which had been capitalized)

Capital Expenditure



- Net payments on investments, or cash capital expenditure, reflect actual cash outlays for fixed assets, taking into account among other things increases and decreases in payables to our suppliers of fixed assets
- Capex programs for 2013 will be relatively front-ended compared with 2012, and are primarily dedicated to new client orders, new projects in growth markets, and investment in hot stamping projects
- Full year cash capex is expected to remain in line with our budget

Net Debt

	As of	
	31 Dec 2012	**30 Jun 2013**
	(Millions of Euros)	
Interest bearing loans and borrowings	1,378.1	1,718.5
Financial leasing	25.1	24.8
Borrowings from associated companies	121.5	118.0
Loans from the Ministry of Science and Technology	34.5	38.3
Other interest bearing loans	39.5	35.0
Total financial debt	**1,598.8**	**1,934.6**
Cash, cash equivalents and current financial assets	301.0	588.6
Net financial debt	**1,297.8**	**1,346.0**

- Increase in net debt reflects our capital investment in expansion and growth projects related to new client orders, as well as seasonal working capital effects and is in line with plan
- Cash, cash equivalents and current financial assets includes cash and cash equivalents as of June 30, 2013 of € 219.1 million and current financial assets as of June 30, 2013 of € 369.5 million (including Mitsui's equity investment of € 297 million in our American operations, payment of which was received during the first week of July)

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