Gestamp

H1 2026

RESULTS PRESENTATION

JULY 30TH, 2026

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KEY HIGHLIGHTS OF H1 2026

REVENUES
€5,794m

Auto Revenue Growth at FX constant (1)

+2.9%	+1.3%
Q2 2026	H1 2026

EBITDA (2)
€651m

EBITDA Margin(2)

11.6%	11.2%
Q2 2026	H1 2026

FCF (3)
Positive

FCF Generation

€86m
H1 2026

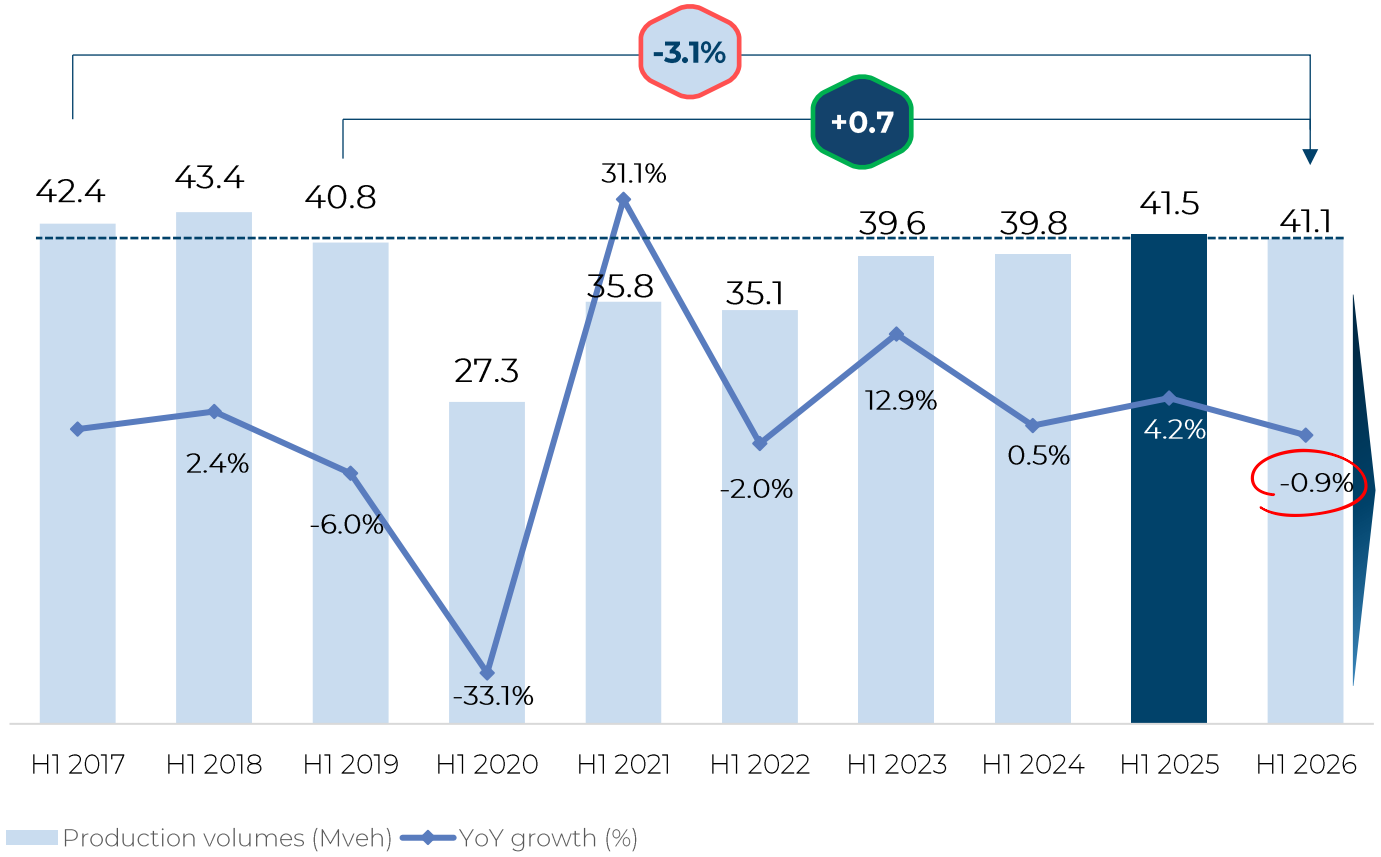
Strong results performance in H1 2026 driving FY 2026 visibility

1. Growth rates related to the Auto business (excluding Gescrap)
2. Excluding Phoenix Plan impact on P&L of €7.5m in Q2 2026 and of €10.9m in H1 2026. Reported EBITDA in H1 2026 is €640m and in Q2 2026 is €337m
3. FCF calculated as change in net debt excluding acquisitions, dividends, share repurchases and a neutral forex (calculated by including exchange gains and losses, hyperinflation effect and certain translation differences with equity impact). Excluding Phoenix Plan impact on P&L of €10.9m & CAPEX of €9.6m in H1 2026

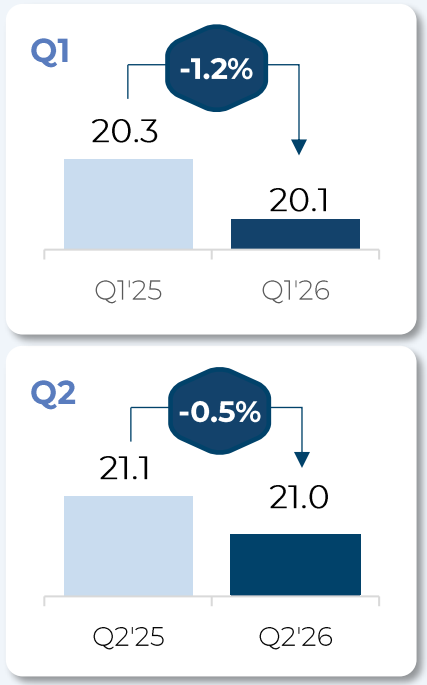
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H1'26 AUTO PRODUCTION STALLS ACROSS KEY REGIONS

Light Vehicle Production Volumes[1]



Gestamp Footprint
H1 2026 Production Volumes



Mveh % — H1 2026 vs H1 2025

China	Western Europe [2]	Eastern Europe	North America
-0.79 (-5.3%)	-0.10 (-1.9%)	-0.04 (-1.3%)	-0.00 (-0.0%)

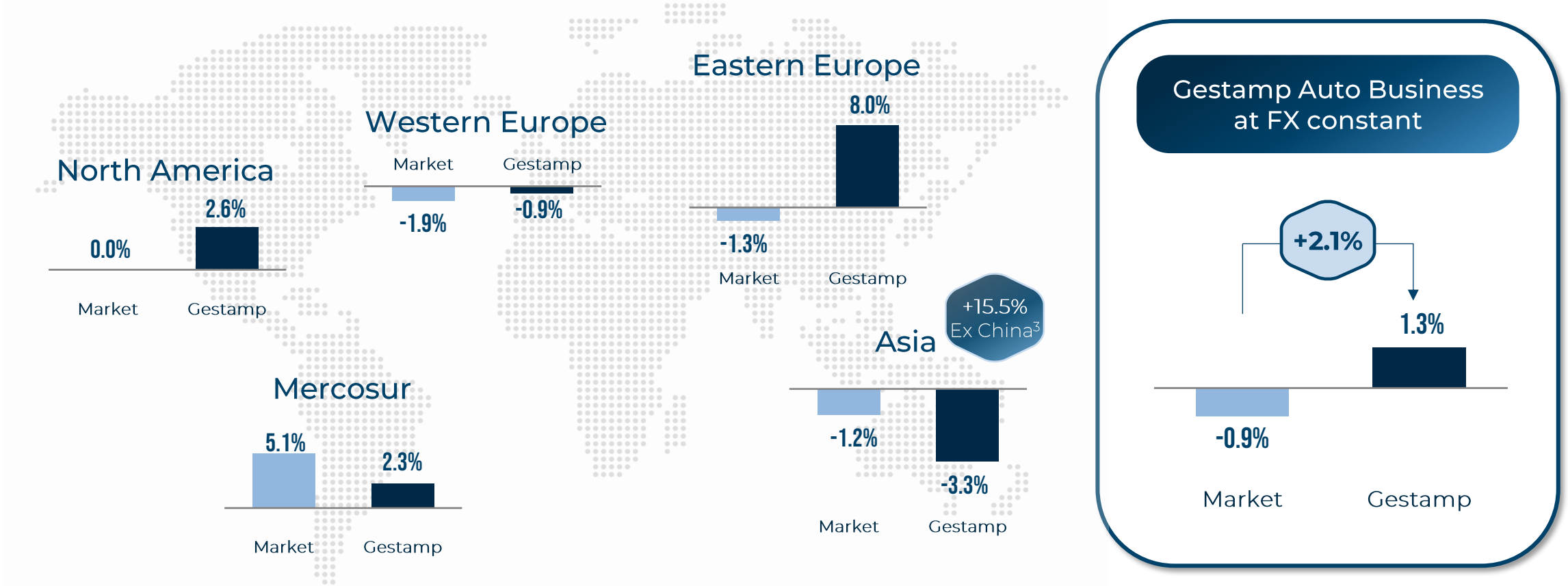
Limited growth in key regions, with challenging year-over-year comparisons in China impacting global production

1. Production volumes in Gestamp's footprint according to S&P Global Mobility data as of July 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M07]. All rights reserved
2. Western Europe data includes Morocco in line with our reporting

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GESTAMP REVENUES PERFORMANCE COMPARED TO THE MARKET

H1 2026 Gestamp Auto Business Revenue Growth at FX Constant[1] vs. Market Production Growth in Gestamp Footprint



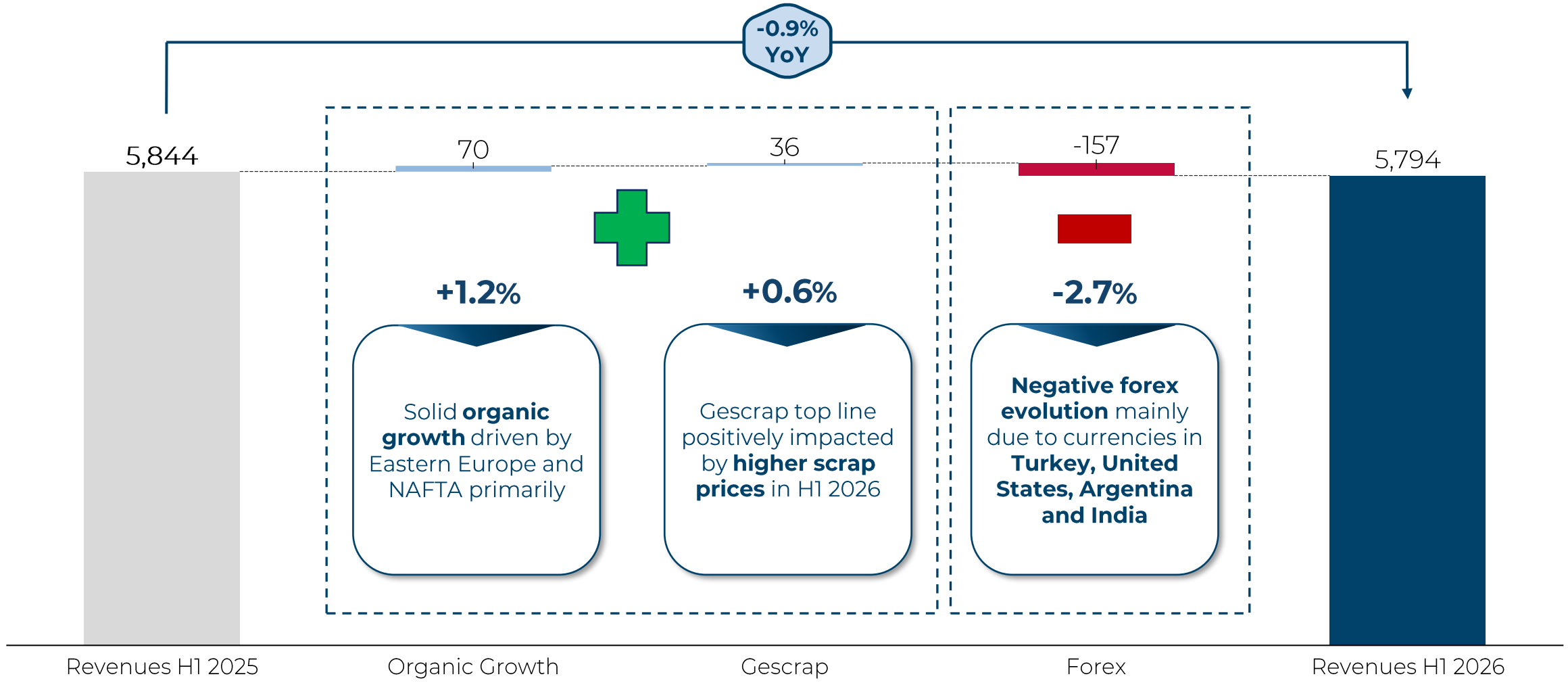
Outperformance of **+2.0 p.p. on a weighted basis**[2] at FX constant in H1 2026

1. Gestamp's organic growth (excluding Gescrap) at FX constant used for comparability with production volumes. Production volumes in Gestamp's footprint as of July 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M07]. All rights reserved. Western Europe data includes Morocco in line with our reporting
2. Market and Gestamp weighted growth measured with H1 2025 geographical weights as a base
3. Outperformance calculated excluding China

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SOLID ORGANIC GROWTH DESPITE A SUBDUED MARKET ENVIRONMENT

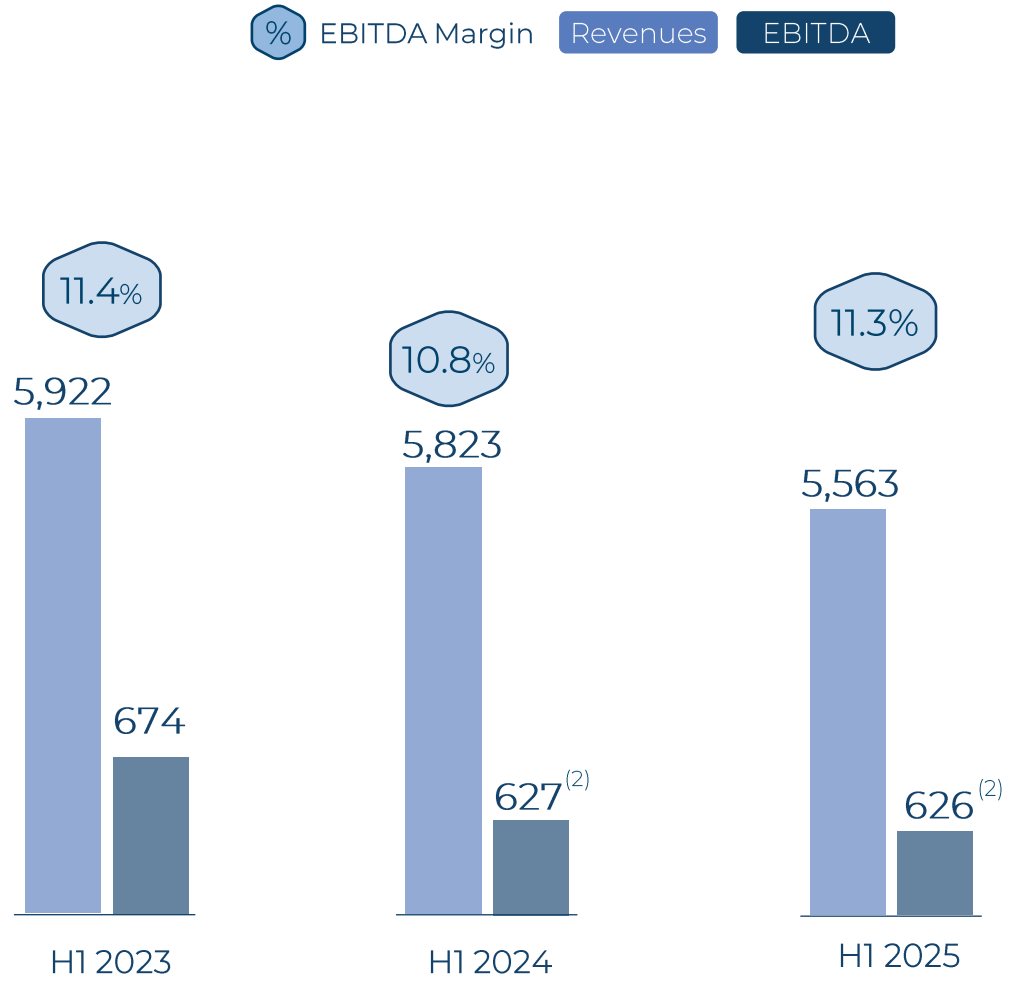
YoY Reported Revenue (€m) Bridge Chart



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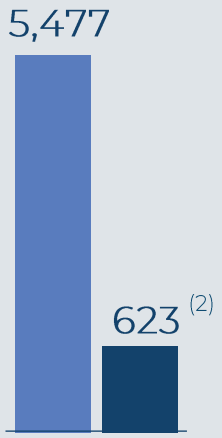
AUTO BUSINESS: FOCUS ON PROFITABILITY IMPROVEMENT AS KEY LEVER

Auto Business Revenues & EBITDA YoY - excluding Phoenix Extraordinary Cost[1]



11.4%

+11bps YoY



H1 2026

On track for the execution of the FY 2026 guidance **>11.9%**

Short-term actions to improve profitability back to peak levels

- ✓ Cost reduction initiatives
- ✓ Flexibility measures
- ✓ Constructive customer's negotiation
- ✓ Delivery on PHOENIX Plan

1. Excluding Phoenix Plan impact on H1 2024 (€12.0m), H1 2025 (€9.5m) and H1 2026 (€10.9m)

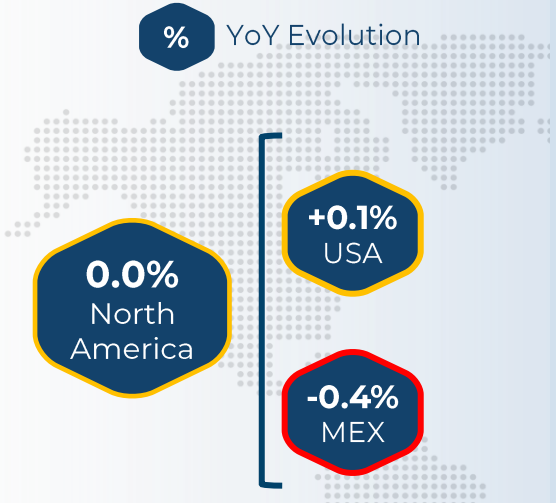
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CONTINUE DELIVERING ON THE PHOENIX PLAN AS A KEY PRIORITY

In a low-growth market Environment

Production volumes in North America [1]

% YoY Evolution



H1 2026

North America excluding Phoenix Extraordinary Plan

Revenues | EBITDA | % EBITDA Margin

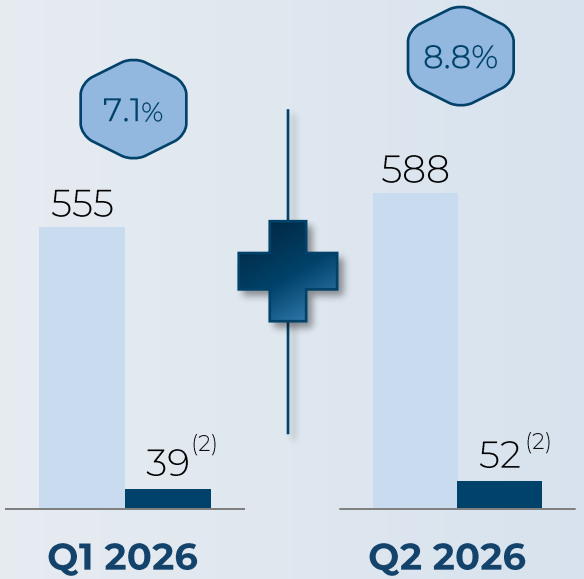
H1 2026 Extraordinary impacts

P&L	€10.9m
CAPEX	€9.6m

c.**50%** Incurred of Total 2026 Impacts

Sequential EBITDA Margin improvement

quarter-on-quarter in 2026



>10%

FY 2026E EBITDA Margin

Committed to deliver on our 2026 target



Strong **profitability momentum** with a clear path to achieve PHOENIX restructuring targets

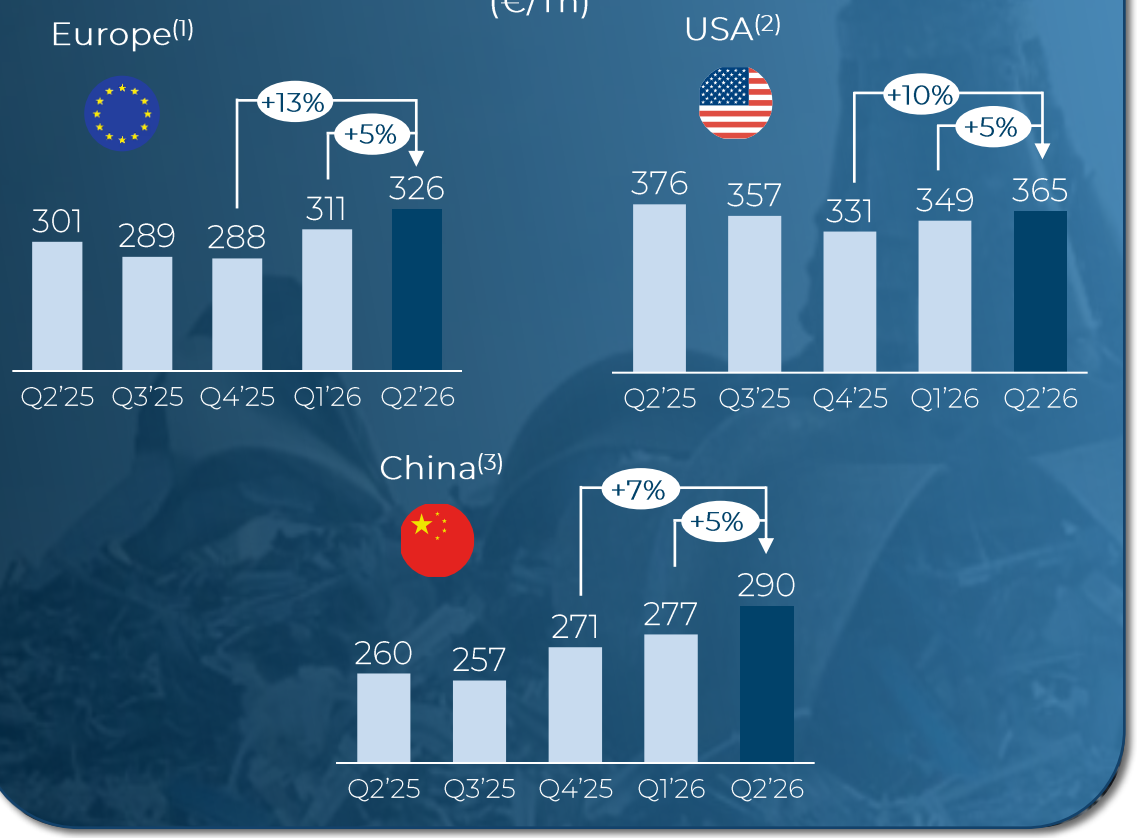
1. Production volumes in Gestamp's footprint according to S&P Global Mobility data as of July 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M07]. All rights reserved
2. Excluding Phoenix Plan impact on P&L of €3.4m in Q1 2026 and of €7.5m in Q2 2026. Impact on P&L of €9.5m in H1 2025 and €10.9m in H1 2026

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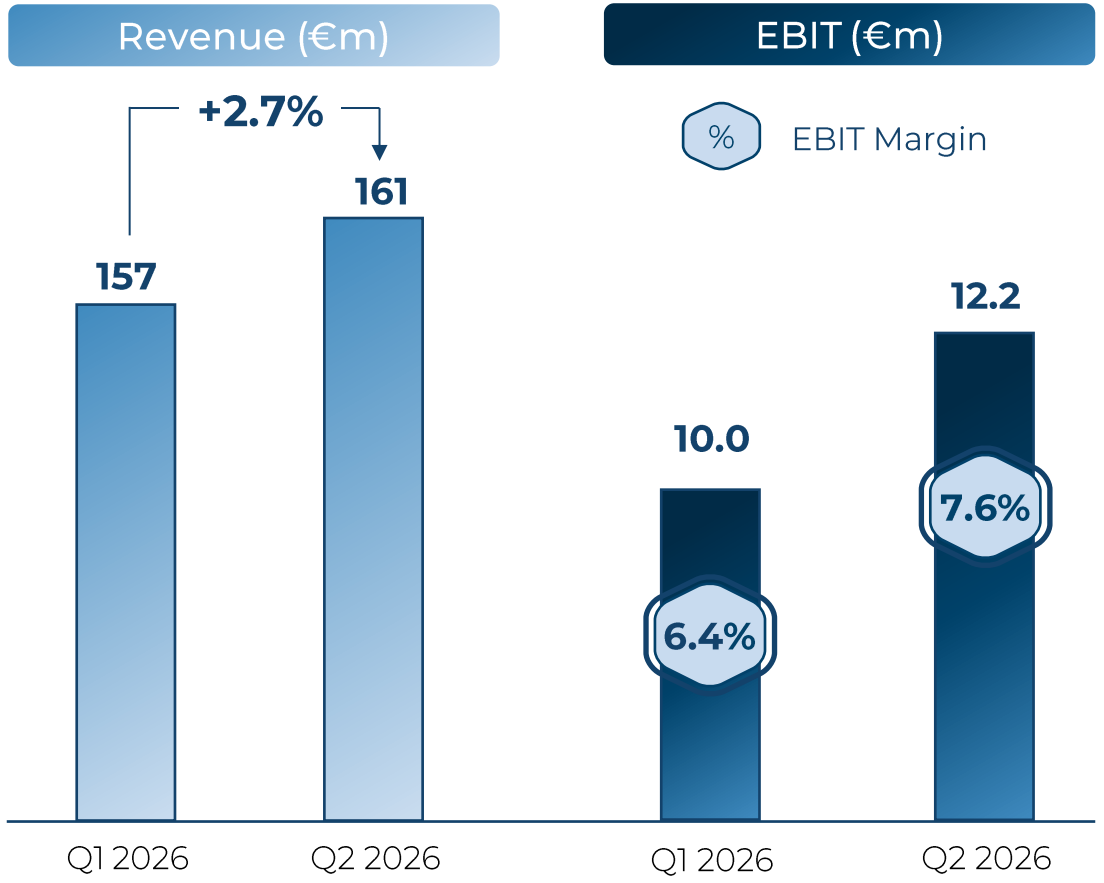
GESCRAP: POSITIVE MOMENTUM AS SCRAP PRICES RECOVER

Scrap prices are progressively recovering from extraordinary negative performance in H2 2025

(€/Tn)



Improving market conditions driving to a significant performance improvement and providing good visibility to achieve YE targets



Source: Bloomberg as of July 2026

1. Figures taken from an average between Turkey Steel Scrap (HMS 1/2 80:20) Spot CFR Index and Germany Steel Demolition Scrap (E3) Spot Ex-Works Index
2. North America Steel #1 Busheling Scrap Spot Index
3. China Heavy Steel Scrap Over 8mm Shanghai Price Index

Note: Tons of scrap managed by Gescrap in the half 1,240k Tons as of H1 2026 and 1,140kTons as of H1 2025

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FINANCIAL PERFORMANCE IN H1 2026

(In €m)	H1 2025 Reported	H1 2026 Reported	H1 2025 Excluding Phoenix(2)	H1 2026 Excluding Phoenix(2)
Total Revenue	5,844	5,794	5,844	5,794
EBITDA	641	640	651	651
EBITDA margin (%)	11.0%	11.1%	11.1%	11.2%
EBIT	286	265	295	276
EBIT margin (%)	4.9%	4.6%	5.0%	4.8%
Net Income	75	110		
FCF(1)	85	65	99	86
Net Debt	2,141	1,771		

Reported revenues have decreased by -0.9%(3) YoY in H1 2026
Reported EBITDA has decreased by -0.1% YoY

Note: All figures including IFRS 16

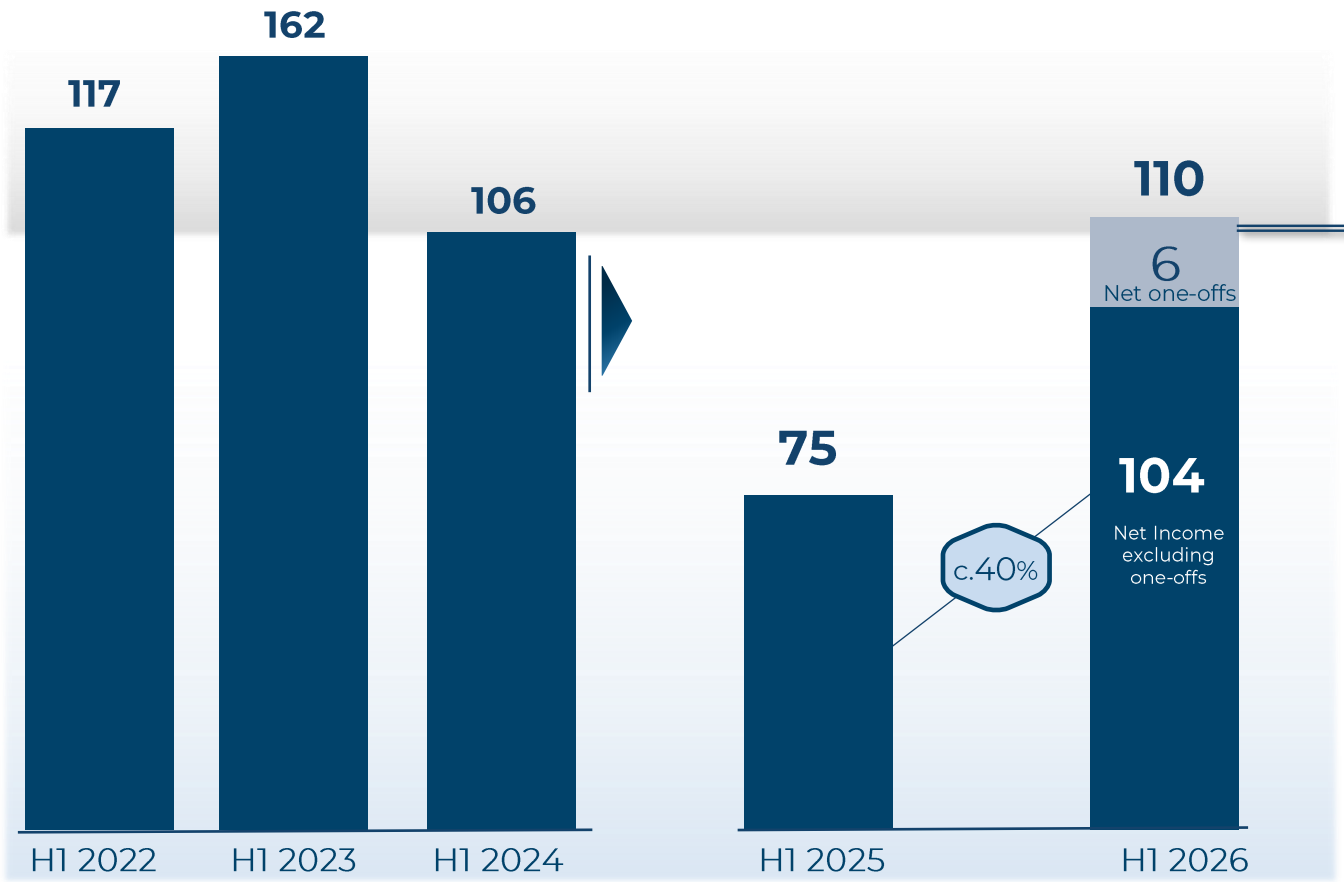
1. FCF calculated as change in net debt excluding acquisitions, dividends, share repurchases and a neutral forex (calculated by including exchange gains and losses, hyperinflation effect and certain translation differences with equity impact)
2. Phoenix Plan impact in H1 2026 on P&L of c.€10.9m & CAPEX of c.€9.6m and in H1 2025 on P&L of c.€9.5m & CAPEX of c.€5.0m related to restructuring of NAFTA business announced in FY 2023
3. Revenues for the Auto Business (excluding Gescrap) at FX constant have increased by +1.3% YoY in H1 2026

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STRONG NET INCOME IMPROVEMENT YEAR-ON-YEAR

Reported Net Income

(In €m)



Non-cash one-off impacts

− €15m of write-downs linked to the extraordinary actions to realign EV exposure initiated in H2 2025, in line with our customers strategy

+ €23m accounting impact at financial income arising from the €1.7bn[1] SFA amend, and extension (IFRS 9) closed in January

= As a result, there is an €8m positive impact at EBT level or €6m net of taxes at net profit

STRONG NET PROFIT IMPROVEMENT EXCLUDING ONE-OFFS

1. SFA amendment closed as of January 8th. €1.7bn includes €500m of revolving credit facility that remains undrawn

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GEOGRAPHIC DIVERSIFICATION SUPPORTING PERFORMANCE

	Revenues (€m)			EBITDA (€m)			EBITDA Margin (%)	
	H1 2025	H1 2026	VAR. (%)	H1 2025	H1 2026	VAR. (%)	H1 2025	H1 2026
Western Europe	2,117	2,090	-1.3%	217	209	-3.9%	10.3	10.0
Eastern Europe	999	1,002	+0.3%	153	151	-1.4%	15.3	15.1
North America[1]	1,149	1,143	-0.5%	81	91	+12.3%	7.1	8.0
Mercosur	394	402	+2.2%	43	52	+21.1%	10.8	12.8
Asia	904	838	-7.2%	132	120	-8.9%	14.6	14.3
Gescrap	281	317	+12.9%	24	28	+16.6%	8.6	8.9
Gestamp	5,844	5,794	-0.9%	651	651	+0.1%	11.1	11.2

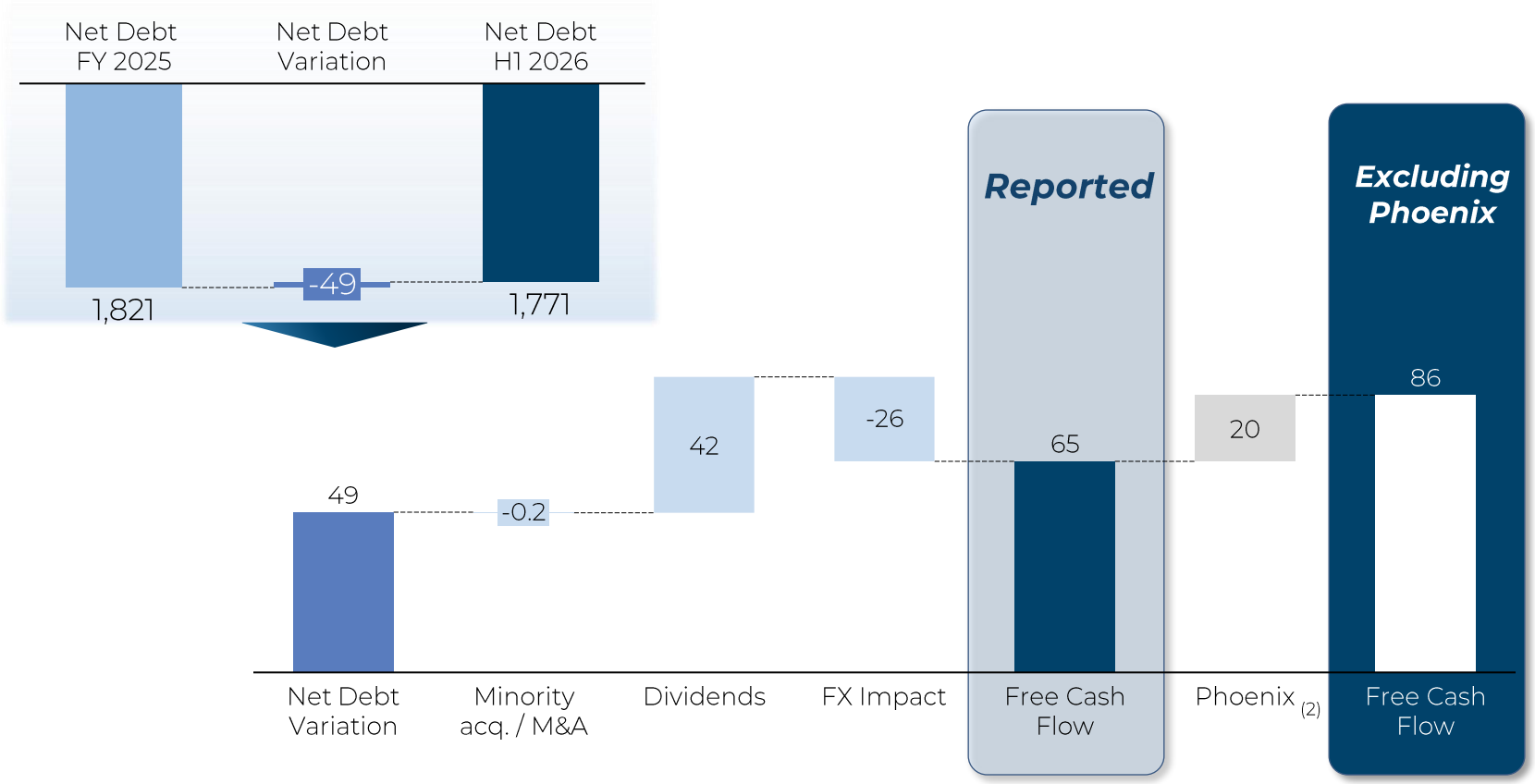
1. NAFTA excluding Phoenix Plan impact on P&L of €10.9m in H1 2026 and of c.€9.5m in H1 2025

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SUSTAINED STRENGTH IN CASH FLOW GENERATION

FCF[1] Generation of 86€m[1,2] in H1 2026

(In €m)



H1 2026 Group Operating Cash Flow Conversion[3]

c.36%

Committed with FY 2026 Guidance of a 35% range

Strong positive FCF[1] generation in Q2 offsetting a negative Q1 due to business seasonality

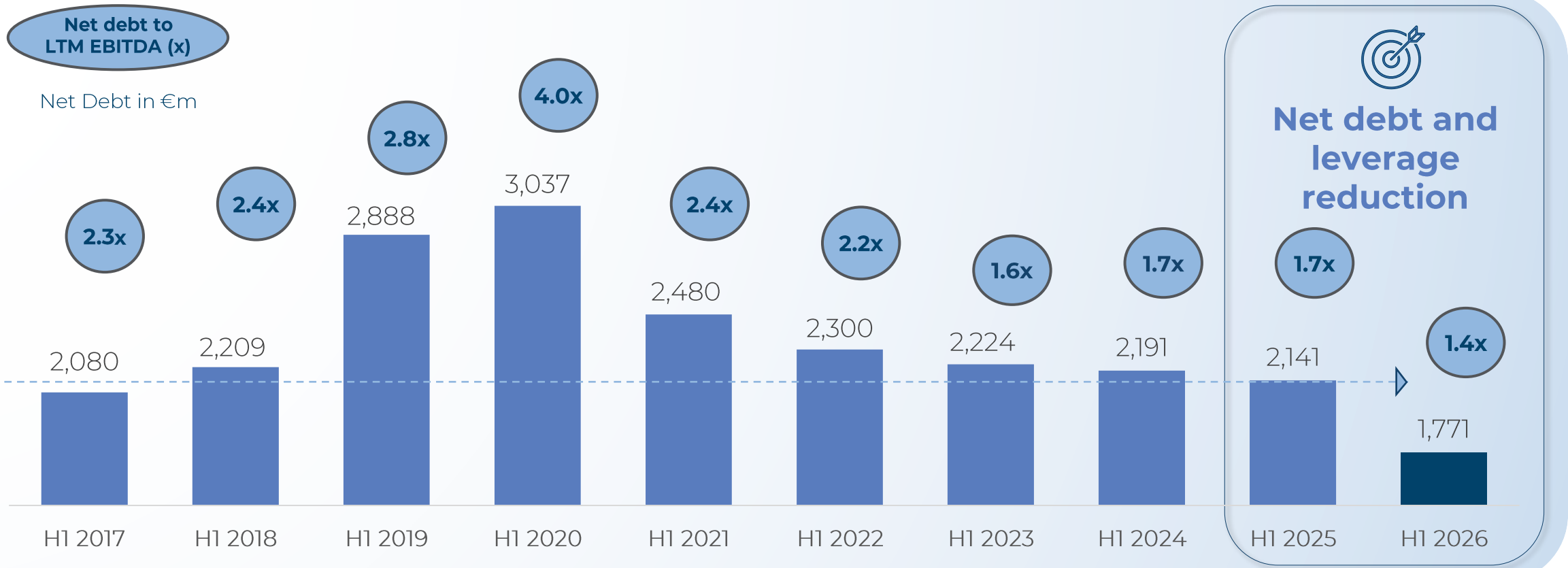
Note: All figures including IFRS 16

1. FCF calculated as change in net debt excluding acquisitions, dividends, share repurchases and a neutral forex (calculated by including exchange gains and losses, hyperinflation effect and certain translation differences with equity impact)
2. Phoenix Plan impact on P&L of c.€7.5m and CAPEX of c.€7.1m in Q2 2026 and in H1 2026 on P&L of c.€10.9m and on CAPEX of c.€9.6m
3. Operating cash flow defined as reported EBITDA minus net cash capex (investment minus asset disposals). Group operating cash flow conversion defined as operating cash flow over EBITDA

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PRESERVING A STRONG FINANCIAL PROFILE

Maintaining First Half Deleverage Path



Lowest Net Debt Figure for a First Half

Note: 2017 & 2018 figures pre-IFRS 16 implementation. Reported net debt including Phoenix impact

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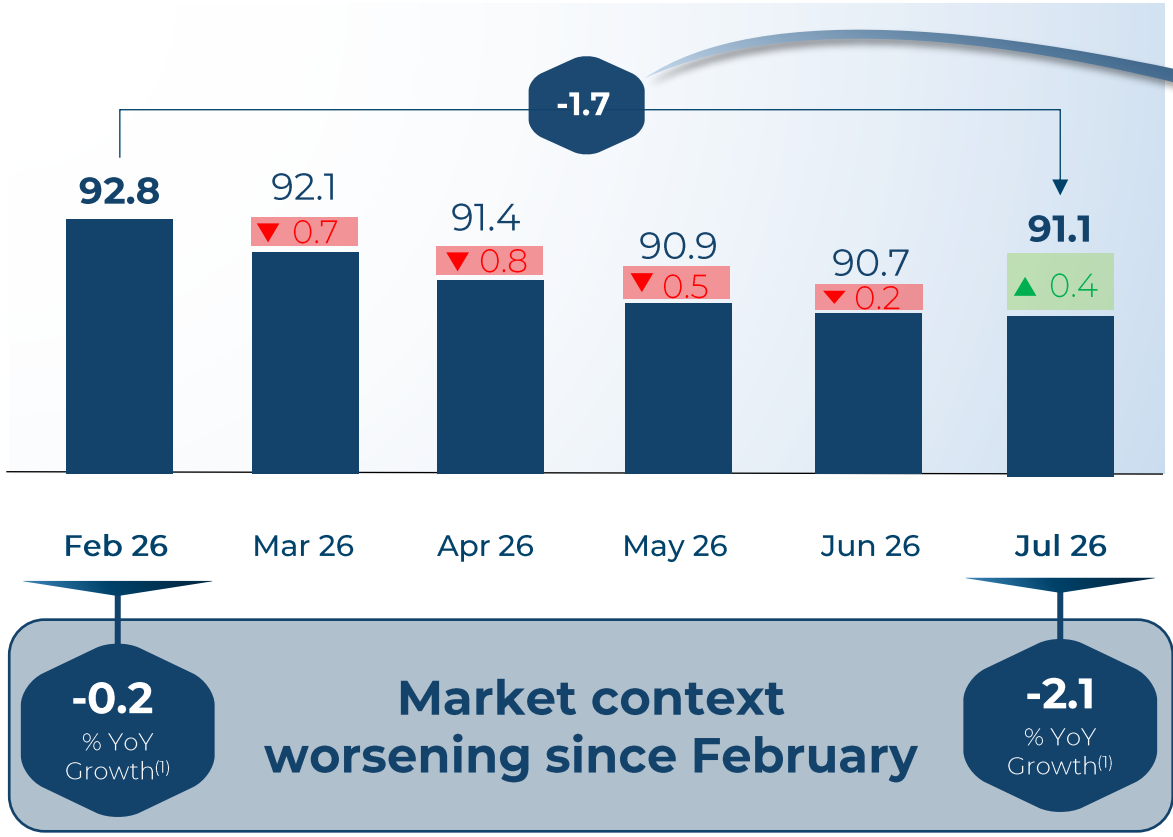
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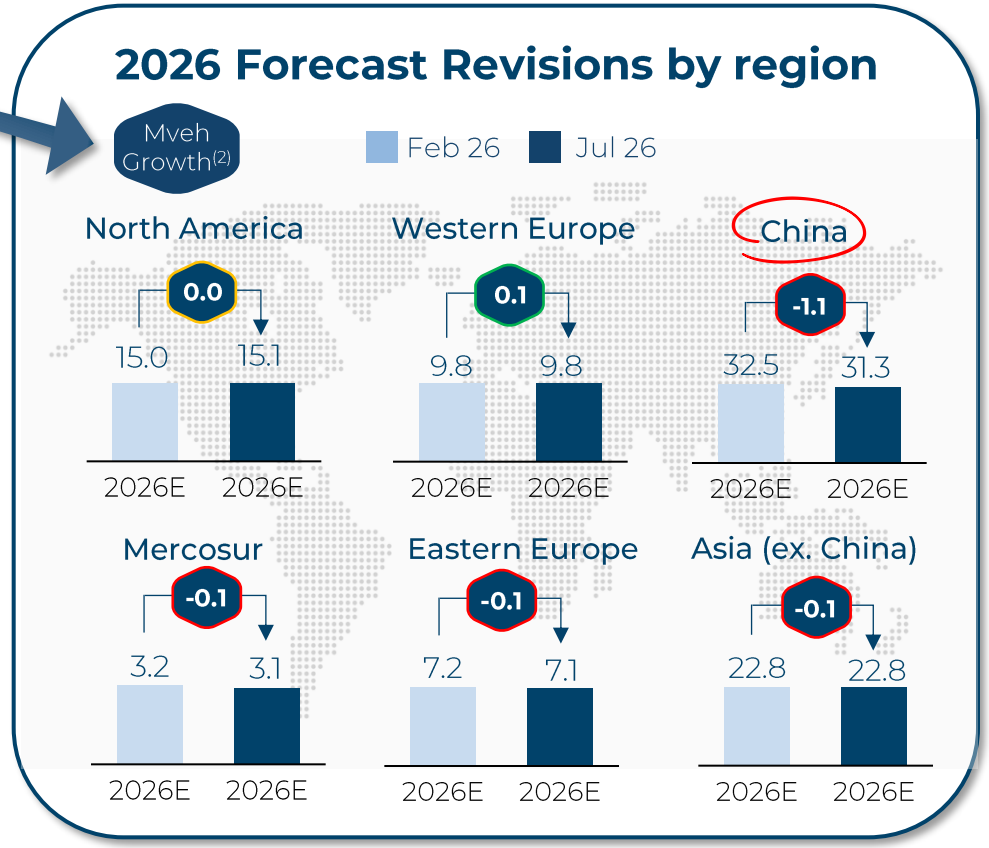
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H1 2026 UPDATES MARKED BY A WEAKENING PRODUCTION OUTLOOK

Auto Production Volumes Revisions in 2026

LV Production[1] in S&P Global Mobility Geographies (Mveh)





July seems to stabilize the yearly outlook after a streak of downward adjustments since February

1. Production volumes according to S&P Global Mobility data as of July 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M07]. All rights reserved
2. Production volumes by geographies according to S&P Global Mobility definition, data as of July 2026

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BALANCE SHEET STRENGTH DRIVING LEADERSHIP AMBITION

AMERICA



BRAZIL

NEW PLANT IN PIRACICABA (SAO PAOLO)

#8TH PLANT IN THE COUNTRY

LOW GROWTH MARKETS

FOCUS ON "RIGHTSIZING"

1. FIXED COST CONTROL
2. REVALUATING CAPACITY TO BECOME MORE FLEXIBLE

HIGH GROWTH REGIONS

SELECTIVE INVESTMENTS WITH A FOCUS ON:

1. ADDING CAPACITY TO CAPTURE GROWTH
2. BROADER CUSTOMER DIVERSIFICATION
3. BECOMING MORE "LOCAL"

SUSTAINABLE VALUE CREATION

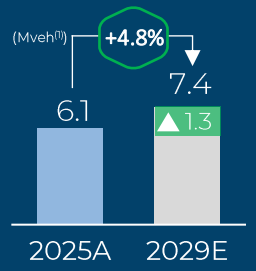
ASIA



INDIA

NEW PLANT IN GUJARAT

#5TH PLANT IN THE COUNTRY



1. Production volumes according to S&P Global Mobility data as of July 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M07]. All rights reserved

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GUIDANCE 2026

REITERATING OUR 2026 GUIDANCE

Group EBITDA Margin[1]

>11.7% at YE 2026

- Auto: **>11.9%** at YE 2026
- Gescrap: **>7.4%** at YE 2026

Group Operating Cash Flow Conversion[2]

in the 35% range at YE 2026

Operating cash flow defined as reported EBITDA minus net cash capex[2]

Note: All figures including IFRS 16 and based on current S&P Global Mobility estimated LV production as of February 2026 growth, at FX constant and extraordinary impacts not forecasted at the time of this release

1. Reported EBITDA margin excluding Phoenix impact of €15.9m on P&L and in the Auto business precisely
2. Operating cash flow defined as reported EBITDA minus net cash capex (investment minus asset disposals). Group operating cash flow conversion defined as operating cash flow over EBITDA

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CLOSING REMARKS

H1 2026 Solid Results

Strong visibility to deliver FY 2026 Guidance

PHOENIX



Phoenix plan as key company priority to reach EBITDA margin targets

Reinforcing our Financial Profile

Strong profitability and FCF generation in H1 2026 reinforcing our positioning

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FINANCIAL PERFORMANCE IN Q2 2026

(In €m)	Q2 2025 Reported	Q2 2026 Reported	Q2 2025 Excluding Phoenix[2]	Q2 2026 Excluding Phoenix[2]
Total Revenue	2,861	2,960	2,861	2,960
EBITDA	341	337	343	344
EBITDA margin (%)	11.9%	11.4%	12.0%	11.6%
EBIT	165	151	168	158
EBIT margin (%)	5.8%	5.1%	5.9%	5.3%
Net Income	48	61		
FCF[1]	176	207	182	222
Net Debt	2,141	1,771		

Reported revenues have increased by +3.5%[3] YoY in Q2 2026
Reported EBITDA has decreased by -1.1% YoY

Note: All figures including IFRS 16
1. FCF calculated as change in net debt excluding acquisitions, dividends, share repurchases and a neutral forex (calculated by including exchange gains and losses, hyperinflation effect and certain translation differences with equity impact)
2. Phoenix Plan impact in Q2 2026 on P&L of c.€7.5m & CAPEX of c.€7.1m and in Q2 2025 on P&L of c.€2.6m & CAPEX of c.€3.6m related to restructuring of NAFTA business announced in FY 2023
3. Revenues for the Auto Business (excluding Gescrap) at FX constant have increased by +2.9% YoY in Q2 2026

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APPENDIX – ALTERNATIVE PERFORMANCE MEASURES

*This results presentation and any related conference call or webcast (including any related question and answer session) (the "**Presentation**"), in addition to financial information detailed in the Gestamp Group's financial statements prepared in accordance with International Financial Reporting Standards, contains alternative performance measures ("**APMs**") as defined in the Guidelines on Alternative Performance Measures published by the European Securities and Markets Authority (ESMA) on October 5, 2015.*

A breakdown of the explanations and reconciliations of the APMs used in the Presentation, as well as further details about its definitions, can be found, as applicable, in Note 4.6. of the Notes to the Consolidated Financial Statements of the Gestamp Group as of December 31, 2025, in the Management Report of the Gestamp Group corresponding to the second quarter of 2026 as well as in the Presentation itself, available both on Gestamp's corporate website (https://gestamp.com/Investors-Shareholders/Economic-Financial-information) and on the website of the National Securities Market Commission (Comisión Nacional del Mercado de Valores) (www.cnmv.es).

Our APMs are described below:

- ***Outperformance:*** *Gestamp's organic growth at FX constant, compared to market production volume growth in Gestamp's production footprint according to IHS data for a given period*
- ***Weighted Outperformance:*** *Market and Gestamp weighted growth measured with Gestamp's previous year geographical weights as base for the given period*
- ***EBITDA:*** *Earnings before interests, taxes, depreciation and amortization*
- ***EBIT:*** *Earnings before interests and taxes*
- ***Capex:*** *Capital Expenditures calculated as sum of additions to other intangible assets and property, plant and equipment*
- ***FCF:*** *calculated as change in net debt excluding acquisitions, dividends, share repurchases and a neutral forex (calculated by including exchange gains and losses, hyperinflation effect and certain translation differences with equity impact)*
- ***Net Debt:*** *Total short-term and long-term debt, minus cash and equivalents*
- ***Backlog****: Represents sales of parts that the company expects to record including production and awarded business, over a period of time*
- ***Sales of Parts:*** *Revenues excluding revenues from Gescrap, as well as scrap and tooling prototypes*
- ***ROCE:*** *Return on capital employed calculated as EBIT divided by capital employed minus growth capex for the last 1.5 years*
- ***Capital Employed:*** *calculated by total assets adjusted for those balance sheet items that do not generate EBIT for the company and minus current liabilities*
- *Total Assets adjustments: Goodwill (excluding Gescrap Goodwill), Patents & Licences, Prepayment, Other NCA, Deferred Tax Liabilities, Other Receivables, Current Income Tax Assets, Receivables from Public Authorities, Cash and Cash Equivalents and Other Current Financial Assets*
- *Current Liabilities adjustments: Short Term debt, Current Tax Liabilities, Payables with Public Authorities, Other Short Term Financial Liabilities, Financial Debts with Associates and Dividends*
- ***EV (Electric Vehicle):*** *Includes battery electric vehicles (BEV), plug-in hybrid electric vehicles (PHEV), fuel cell electric vehicle (FCEV) & plug-in fuel cell electric vehicle (PFCEV)*

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