



FY 2025

RESULTS PRESENTATION

FEBRUARY 26TH, 2026



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KEY HIGHLIGHTS FOR FY 2025

FINANCIAL OVERVIEW

OUTLOOK AND REMARKS

2025 A YEAR MARKED BY

A MARKET CONTEXT OF

A global tariff war

Regulatory changes in key geographies

Major OEMs realigning their strategies to a slower EV adoption

Limited volume growth outside Asia

WITH GESTAMP FOCUSING ON

Delivering strong FY 2025 results

Taking extraordinary strategic actions to realign EV exposure

Enhancing our balance sheet profile to gain flexibility and optionality

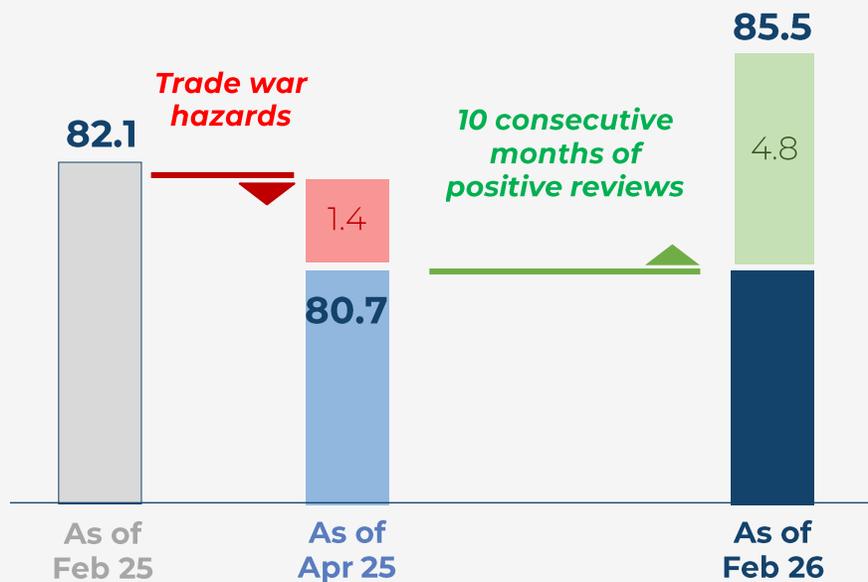
Once more, delivering on PHOENIX

2025: A MUCH BETTER YEAR THAN INITIALLY FORECASTED

Light Vehicle Production Volumes⁽¹⁾

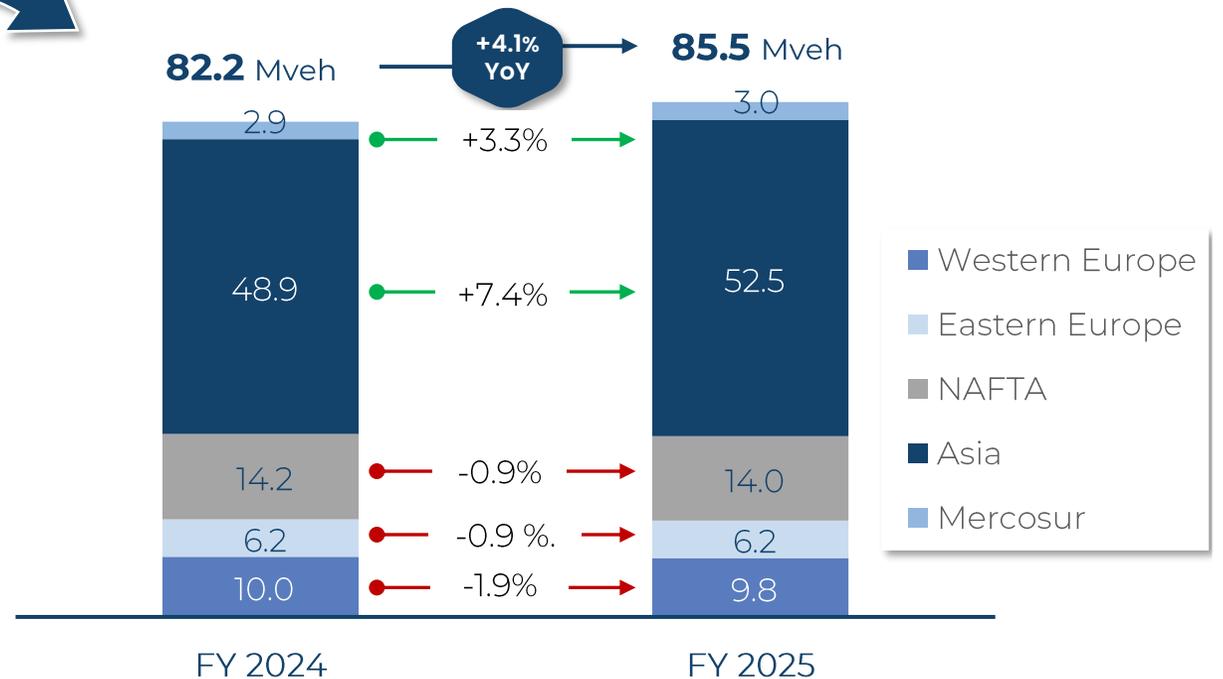
2025 with greater uncertainty & volatility than expected...

FY2025 Total Production Volumes Revision



...most of the growth is driven by Asia

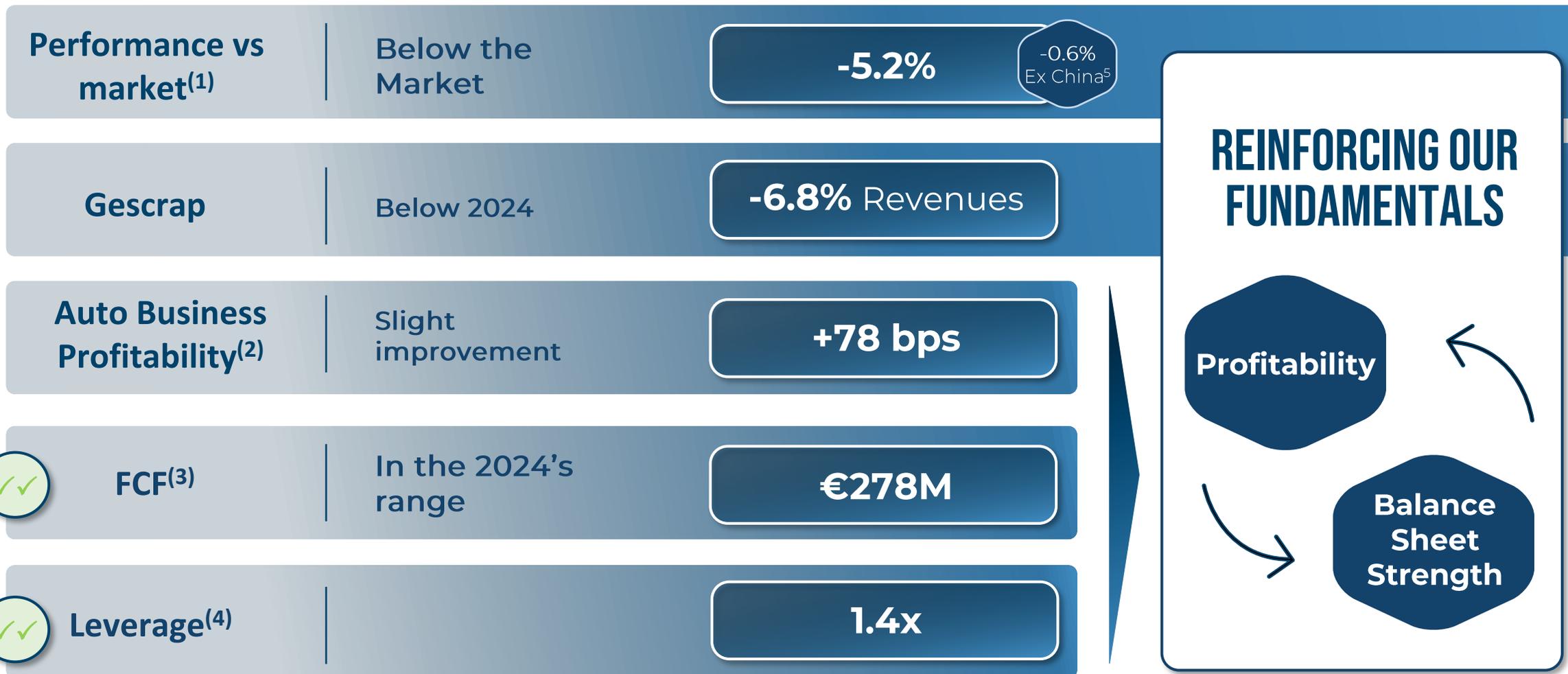
Total Production Volumes by Region



Higher volumes produced in China leading to an increase in Asia production volume

1. Production volumes in Gestamp geographies according to S&P Global Mobility data as of February 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M02]. All rights reserved

GESTAMP HAS MET ALL ITS 2025 UPDATED TARGETS



Note: All figures including IFRS 16. Updated guidance based on S&P Global Mobility estimated LV production as of February 2026

1. Based on current S&P Global Mobility estimated LV production as of February 2026 growth, at FX constant.

2. EBITDA Margin excluding Gescrap and Phoenix extraordinary costs

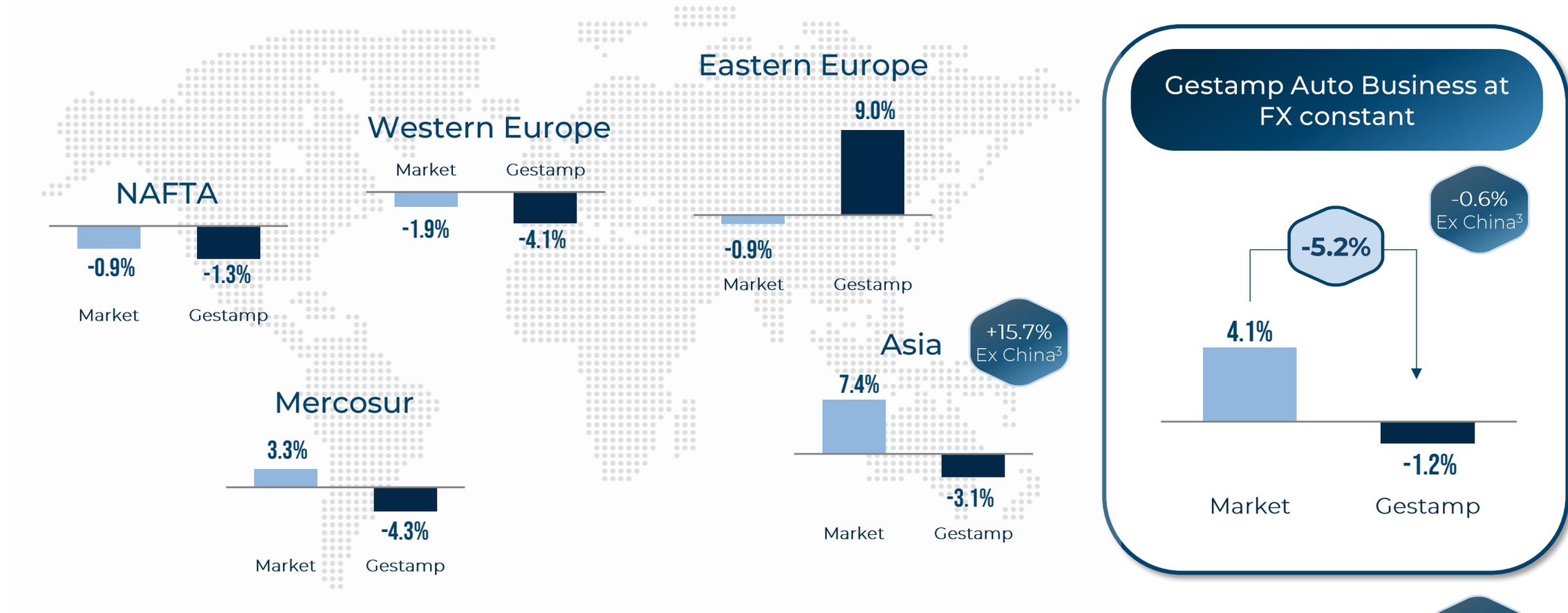
3. FCF calculated as change in net debt excluding acquisitions, dividends, share repurchases, a neutral forex (calculated by including exchange gains and losses, hyperinflation effect and certain translation differences with equity impact) and excluding Phoenix extraordinary costs

4. Leverage defined as Net Debt to LTM EBITDA excluding M&A and Phoenix extraordinary costs

5. Outperformance calculated excluding China

GESTAMP REVENUES PERFORMANCE COMPARED TO THE MARKET

FY 2025 Gestamp Auto Business Revenue Growth at FX Constant⁽¹⁾ vs. Market Production Growth in Gestamp Footprint



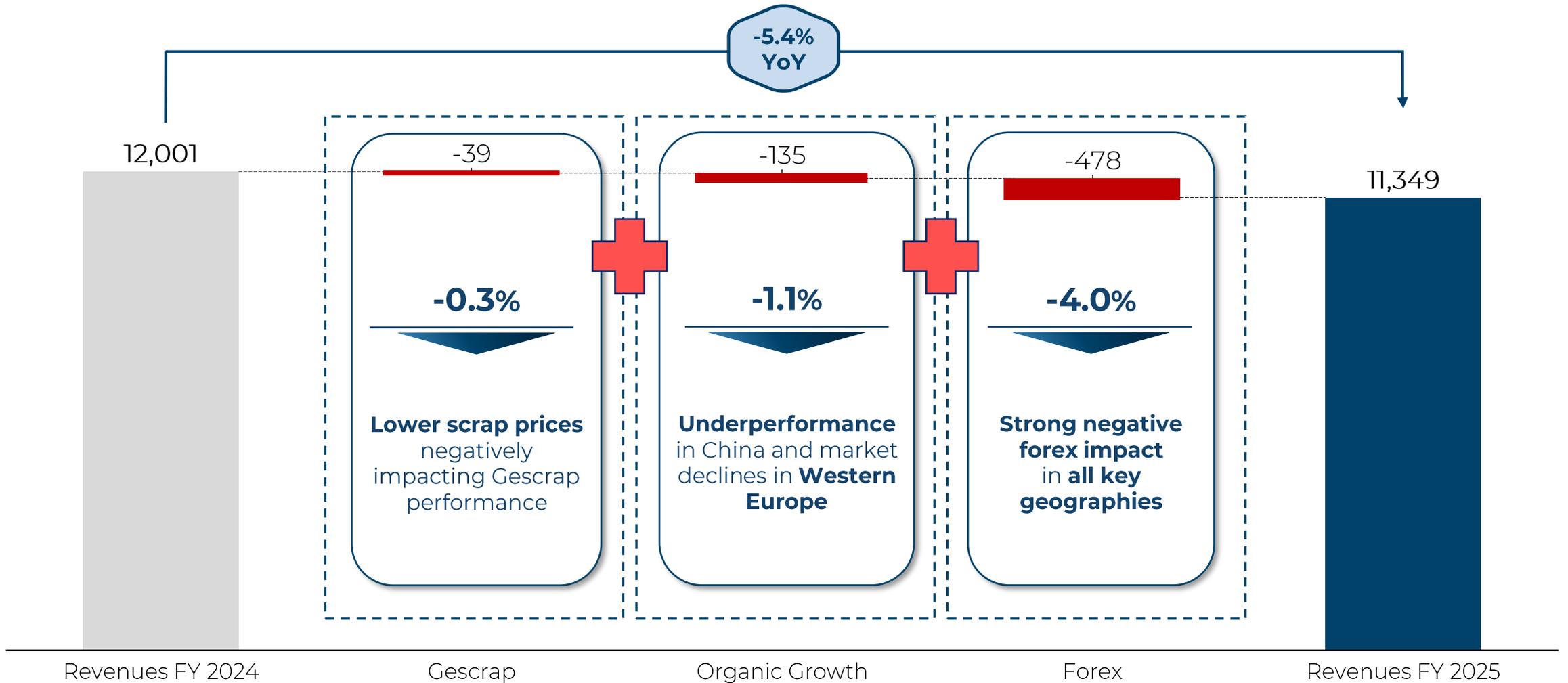
Underperformance of **-1.7 p.p. on a weighted basis⁽²⁾** at FX constant in FY 2025

+0.7%
Ex China³

1. Gestamp's organic growth (excluding Gescrap) at FX constant used for comparability with production volumes. Production volumes in Gestamp's footprint as of February 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M02]. All rights reserved. Western Europe data includes Morocco in line with our reporting
 2. Market and Gestamp weighted growth measured with FY 2024 geographical weights as a base
 3. Outperformance calculated excluding China

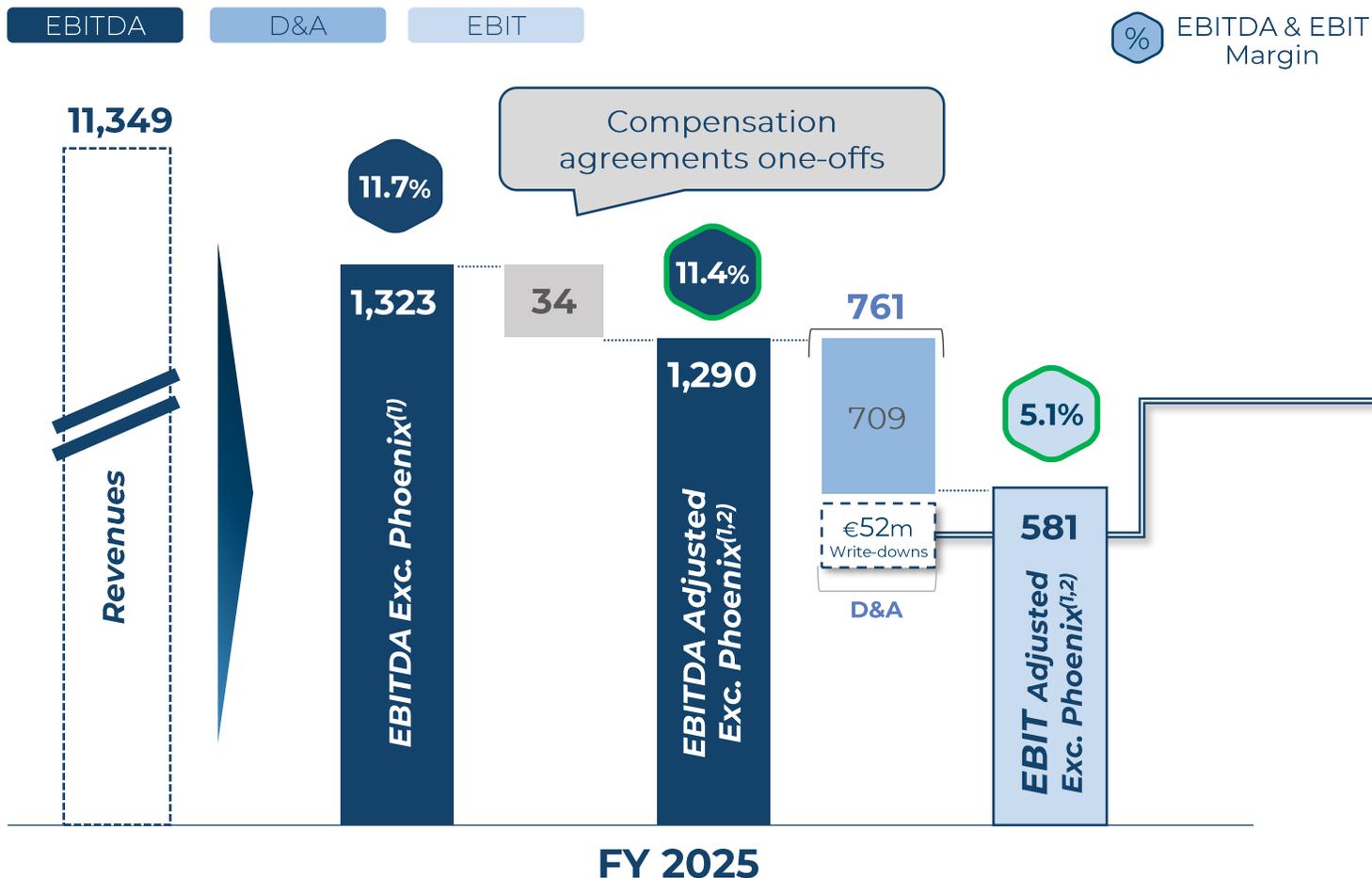
REVENUES STRONGLY IMPACTED BY NEGATIVE FOREX EVOLUTION

YoY Reported Revenue (€m) Bridge Chart



EXTRAORDINARY ACTIONS TO REALIGN EV EXPOSURE

EBITDA and EBIT bridge excluding one-offs impacts

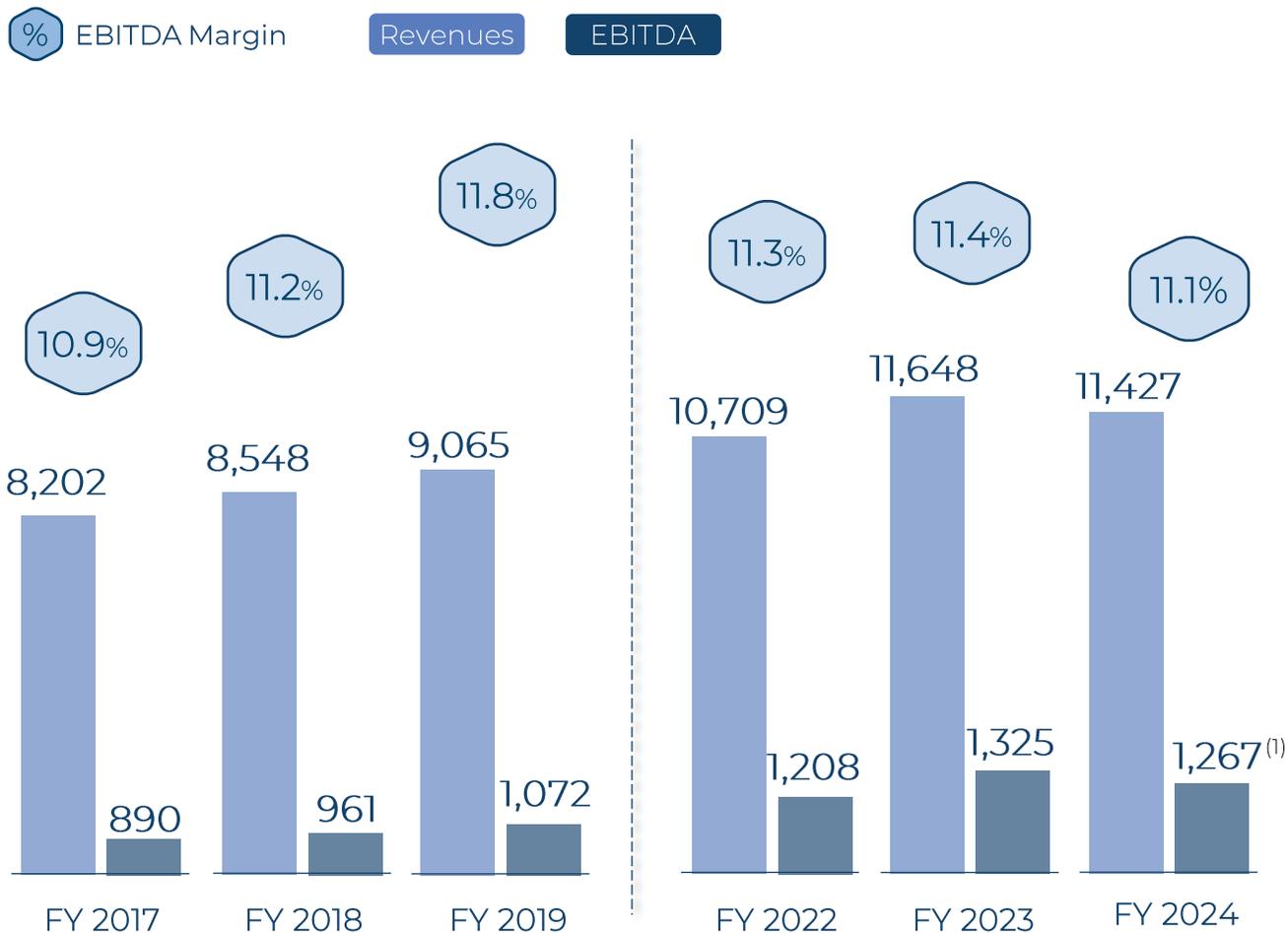


- ❖ During FY 2025, Gestamp entered into compensation agreements with certain customers, resulting in two primary P&L impacts in Q4 2025:
 - ❖ An around €34m positive accounting impact at the EBITDA level
 - ❖ Asset write-downs totaling €52m
 - ❖ Overall, these items generated a net €19m negative impact at the EBIT level
- ❖ These effects are linked to the “realignment” strategies announced by several OEMs, largely driven by a slowdown in their EV rollout plans
- ❖ The settlements fall within the framework of Gestamp’s ongoing constructive negotiations with its customers

1. Excluding Phoenix Plan impact on P&L of €15.9m in FY 2025 & of €24.9m in FY 2024
 2. Adjusted calculated excluding extraordinary compensation one-offs impacts at EBITDA and EBIT level

PROVEN IMPROVEMENT IN SUSTAINABLE PROFITABILITY

Auto Business Revenues & EBITDA YoY - excluding Phoenix Extraordinary Cost⁽¹⁾



11.9%
+78bps YoY

10,814
1,284⁽¹⁾

FY 2025

FY 2025 Profitability Target Achieved

Short-term actions to improve profitability levels

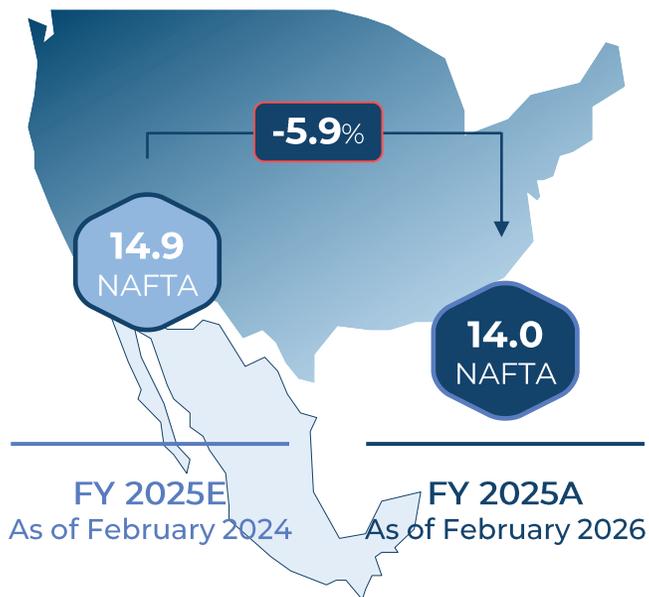
- ✓ Cost reduction initiatives
- ✓ Flexibility measures
- ✓ Constructive customer's negotiation
- ✓ Delivery on **PHOENIX** Plan

1. Excluding Phoenix Plan impact on P&L of €15.9m in FY 2025 & of €24.9m in FY 2024
 2. Excluding extraordinary compensation one-offs impacts in EBITDA

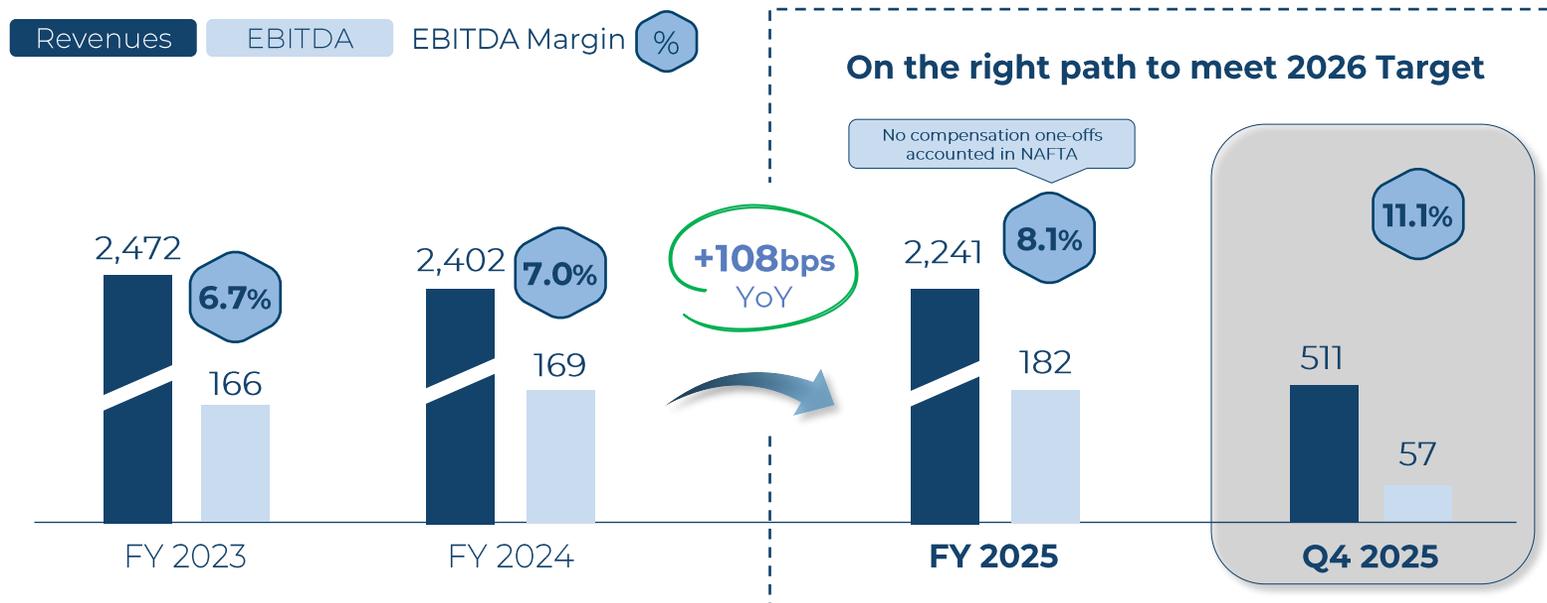
PHOENIX PLAN: 2025 TARGET ACHIEVED

FY 2025 Production volumes evolution in NAFTA⁽¹⁾

Mveh as of February 2024 vs February 2026



NAFTA excluding Phoenix Extraordinary Plan⁽²⁾



Extraordinary Phoenix Costs

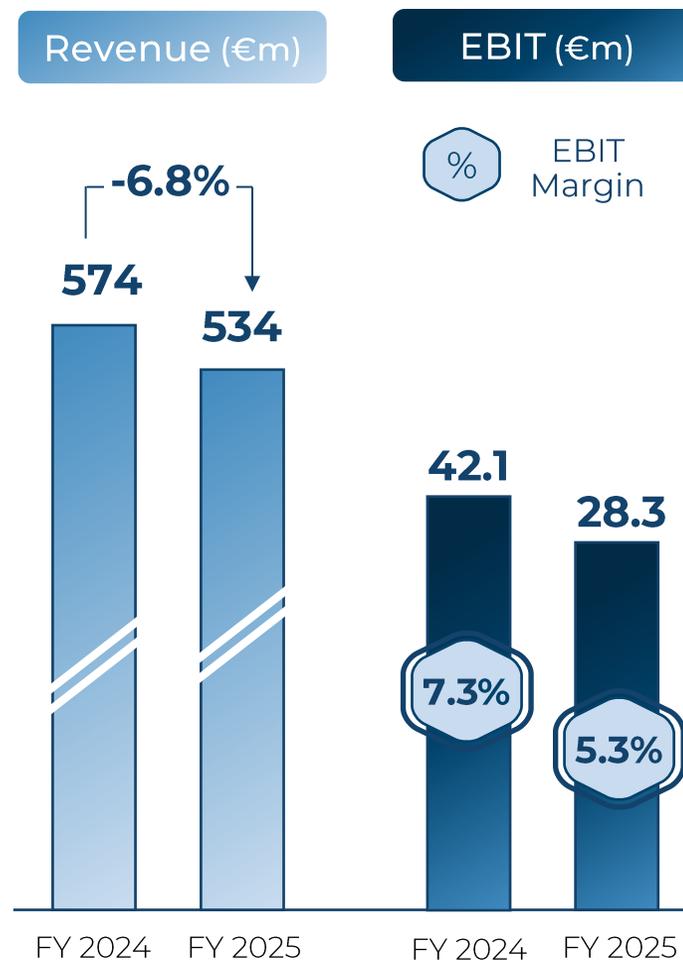
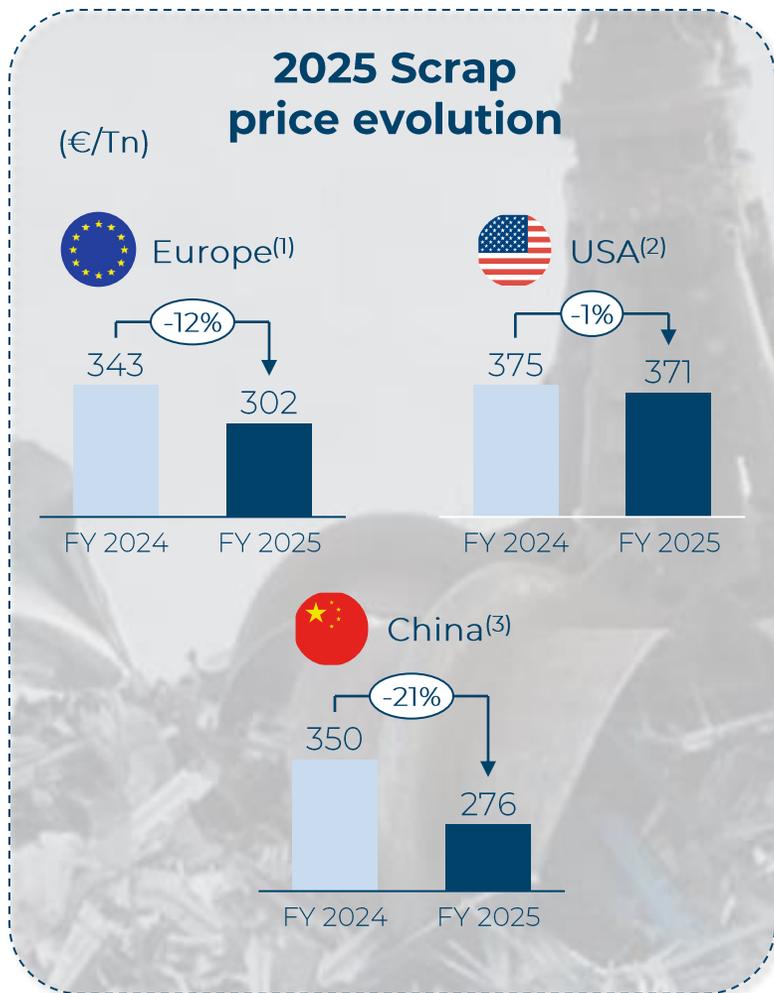
(€m)	FY 2025
P&L	16
CAPEX	13

All Expenses and Investments not committed in 2025 rolled forward to 2026

1. Production volumes in Gestamp geographies according to S&P Global Mobility data as of February 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M02]. All rights reserved

2. Excluding Phoenix Plan impact on P&L of €15.9m in FY 2025 and of €24.9m in FY 2024. Impact on P&L of €3.8m in Q4 2025

GESCRAP: PERFORMANCE IMPACTED BY SCRAP PRICES EVOLUTION



2025 marked by sustained decline in scrap prices throughout the year

CONSOLIDATING ITS POSITIONING

- ❖ In Q2 Gescrap closed the acquisition of Industrias López Soriano in Spain
- ❖ With this acquisition Gescrap consolidates its leading position in Spain while diversifies its technologies and subproducts offered by entering:
 - ❖ Shredding
 - ❖ Recycling of waste electrical and electronic equipment (WEEE)

Source: Bloomberg as of February 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

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KEY HIGHLIGHTS FOR FY 2025

FINANCIAL OVERVIEW

OUTLOOK AND REMARKS

FINANCIAL PERFORMANCE IN FY 2025

(In €m)	FY 2024 Reported	FY 2025 Reported	FY 2024 Excluding Phoenix ⁽²⁾	FY 2025 Excluding Phoenix ⁽²⁾
Total Revenue	12,001	11,349	12,001	11,349
EBITDA	1,294	1,307	1,319	1,323
EBITDA margin (%)	10.8%	11.5%	11.0%	11.7%
EBIT	582	546	607	562
EBIT margin (%)	4.9%	4.8%	5.1%	5.0%
Net Income	188	152		
FCF⁽¹⁾	147	249	178	278
Net Debt	2,097	1,821		

Reported revenues have decreased by -5.4%⁽³⁾ YoY in FY 2025
 Reported EBITDA has increased by +1.0% 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). The reported 2024 FCF of €103m did not include the forex impact. The figure has been restated solely for comparability purposes.
2. Phoenix Plan impact in FY 2025 on P&L of €15.9m & CAPEX of €12.8m and in FY 2024 on P&L of €24.9m & CAPEX of €6.2m related to restructuring of NAFTA business announced in FY 2023
3. Revenues for the Auto Business (excluding Gescrap) at FX constant have declined by -1.2% YoY in FY 2025

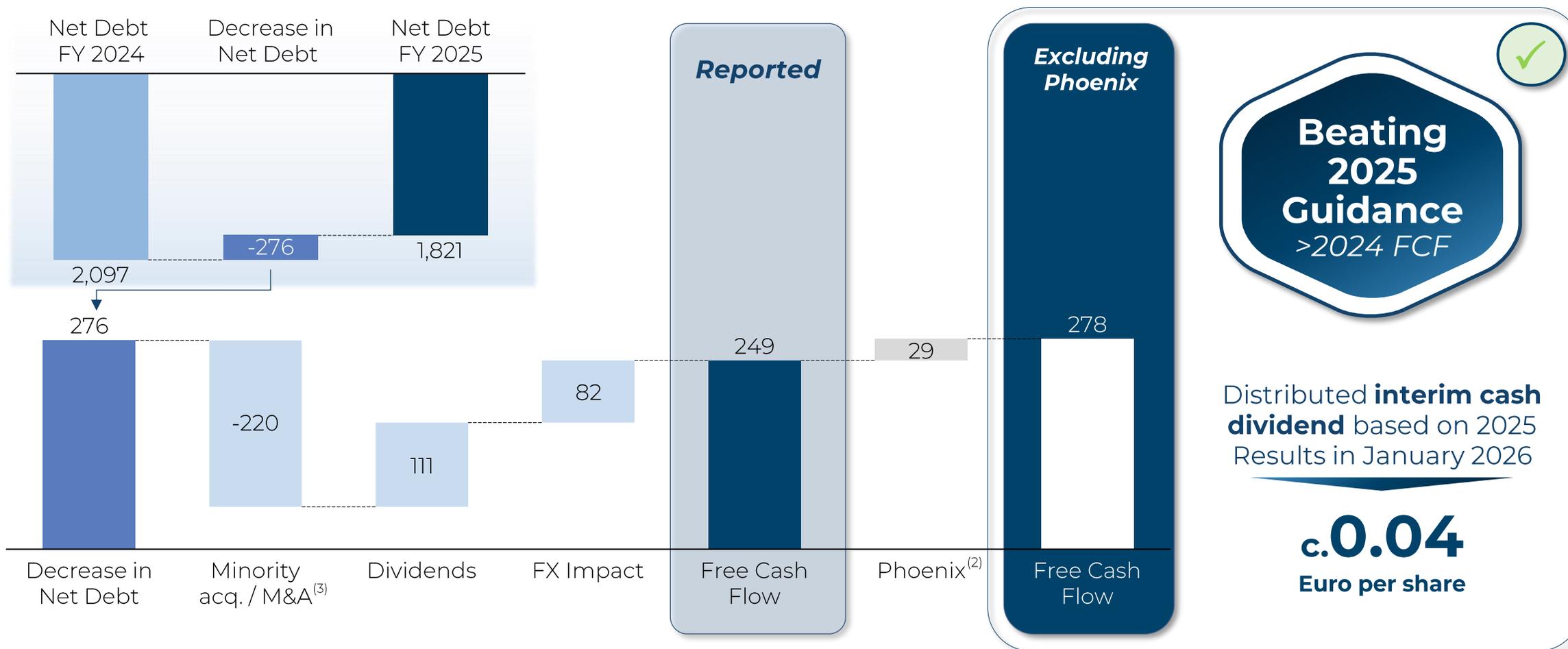
GEOGRAPHIC DIVERSIFICATION SUPPORTING 2025 PERFORMANCE

	Revenues (€m)			EBITDA (€m)			EBITDA Margin (%)	
	FY 2024	FY 2025	VAR. (%)	FY 2024	FY 2025	VAR. (%)	FY 2024	FY 2025
Western Europe	4,219	4,042	-4.2%	480	453	-5.7%	11.4	11.2
Eastern Europe	1,902	1,925	+1.2%	254	293	+15.4%	13.3	15.2
NAFTA ⁽¹⁾	2,402	2,241	-6.7%	169	182	+7.8%	7.0	8.1
Mercosur	928	782	-15.7%	88	92	+4.9%	9.4	11.8
Asia	1,976	1,823	-7.7%	277	264	-4.6%	14.0	14.5
Gescrap	574	534	-6.8%	52	39	-23.5%	9.0	7.4
Gestamp	12,001	11,349	-5.4%	1,319	1,323	+0.3%	11.0	11.7

1. NAFTA excluding Phoenix Plan impact on P&L of €15.9m in FY 2025 and of €24.9m in FY 2024

RECORD FCF GENERATION SINCE IPO

Total FCF⁽¹⁾ generation of €278m^(1,2) in 2025



Note: All figures including IFRS 16

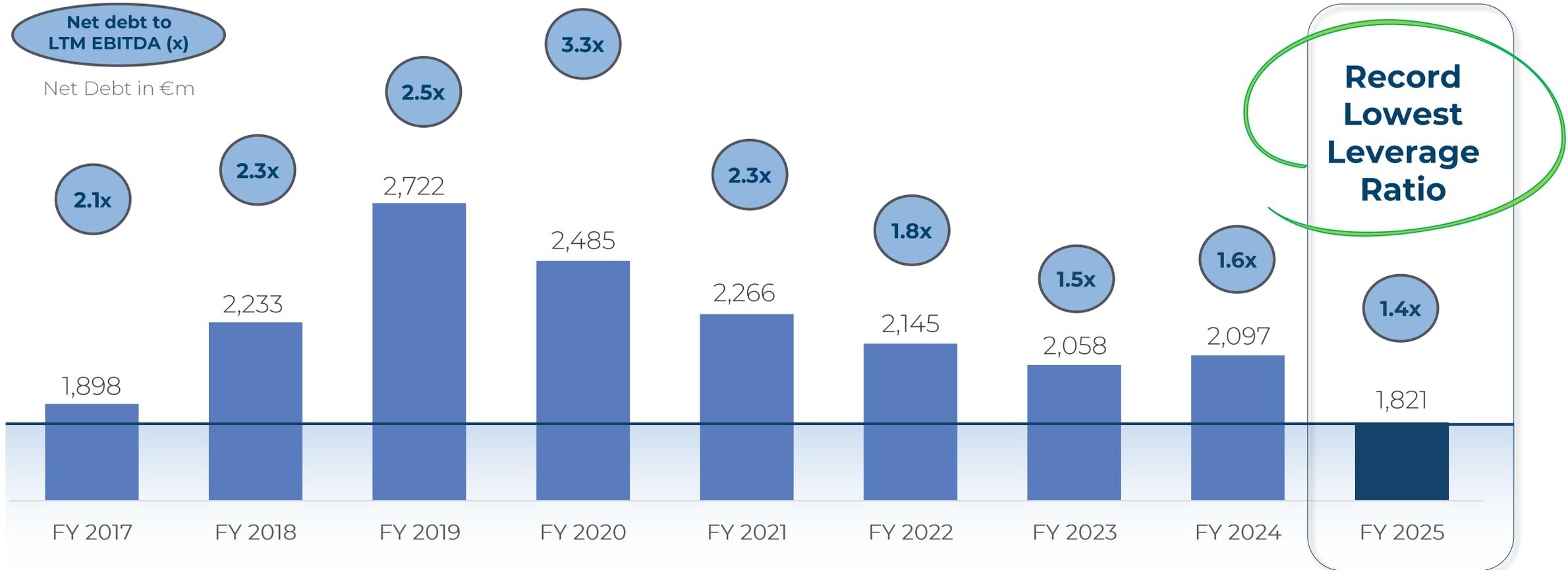
1. FCF calculated as change in net debt excluding acquisitions, dividends, share repurchases and a neutral forex (calculated by including exchange gains and losses, hyperinflation effect and certain translation differences with equity impact)

2. Phoenix Plan impact in FY 2025 on P&L of €15.9m and on CAPEX of €12.8m

3. Includes minorities' acquisitions, M&A and equity contributions (Partial sale and leased-back signed as of September 2025 with €246m capital injection)

FOCUS ON MAINTAINING THE DELEVERAGE PATH

Leverage and Net Debt Evolution

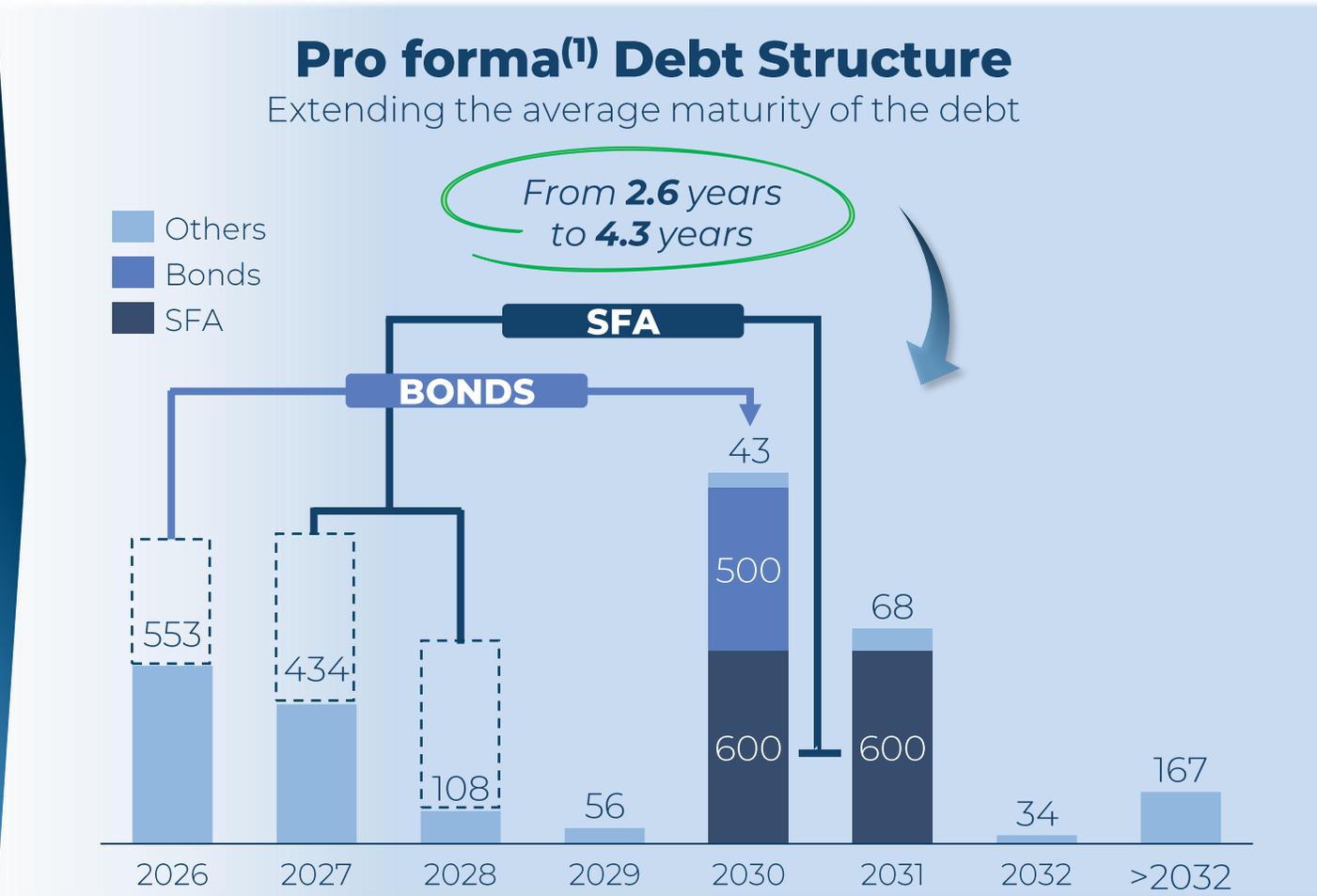


Reaching our 1.0-1.5x Net Debt to EBITDA target

Note: 2017 & 2018 figures pre-IFRS 16 implementation

ENHANCING OUR BALANCE SHEET PROFILE IN 2025

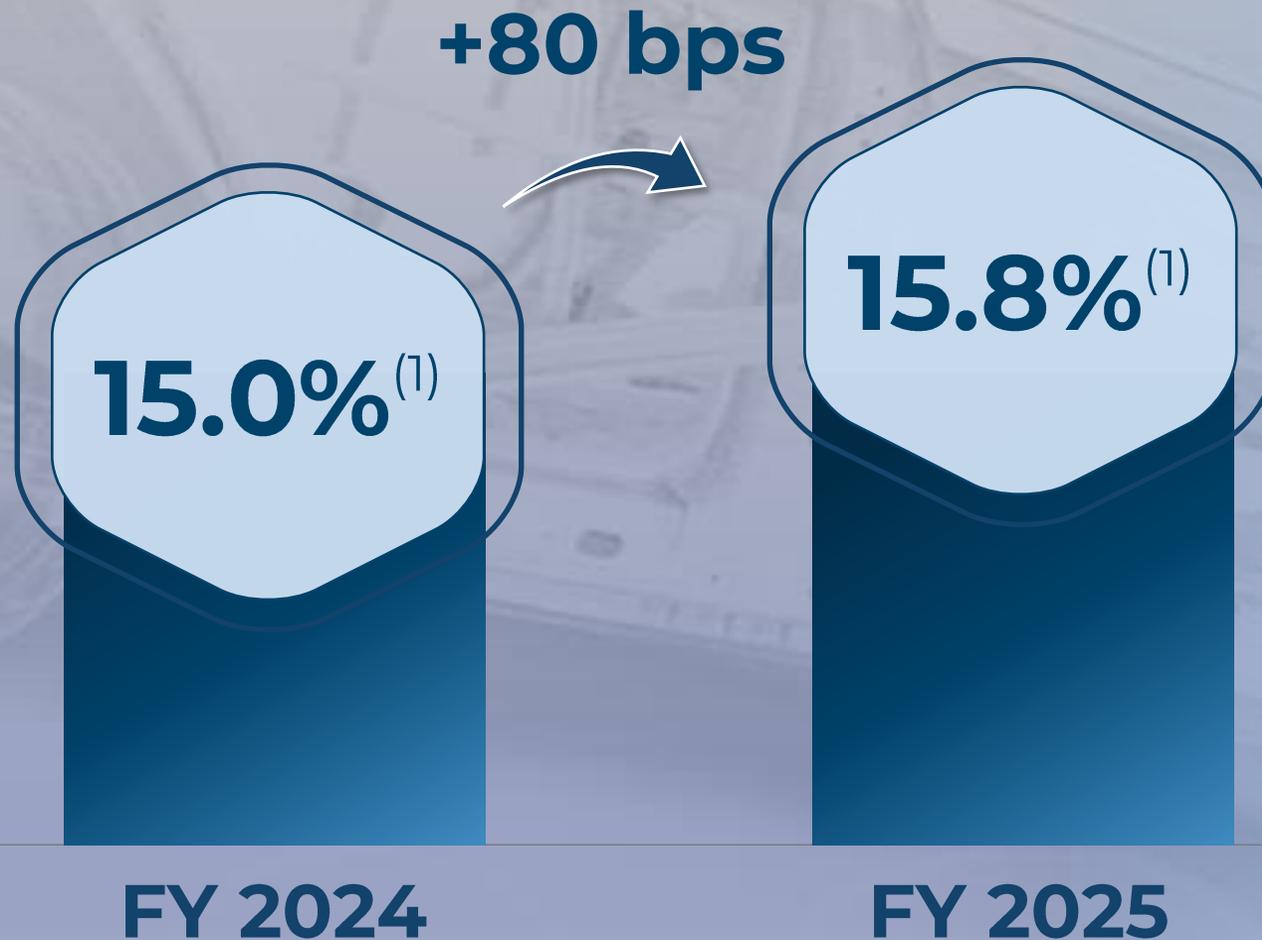
- ✔ **Partial Real Estate Sale & Lease Back Agreement in Spain** **Value of €246m**
- ✔ **New Senior Secured Bonds Issuance** **Offering of €500m**
- ✔ **Amendment agreement to the SFA + RCF⁽²⁾** **Extension of €1,700m**



Improving balance sheet **flexibility** while gaining **optionality**

1. SFA closing as of 8th January 2026
 2. Revolving Credit Facility of €500m remaining 100% undrawn as of the date of this release

ROCE IMPROVEMENT IN 2025



GESTAMP AIMS AT REMAINING DISCIPLINED ON CAPEX INVESTMENTS AND IMPROVE PROFITABILITY TO DRIVE VALUE TO ITS SHAREHOLDERS

Note: ROCE defined as: EBIT (excluding extraordinary impacts) / (Capital Employed – Growth Capex last 1.5 years)

1. Excluding Phoenix Plan impact in FY 2024 (P&L of €24.9m and CAPEX of €6.2m) and in FY 2025 (P&L of €15.9m and CAPEX of €12.8m), M&A and extraordinary impacts

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KEY HIGHLIGHTS FOR FY 2025

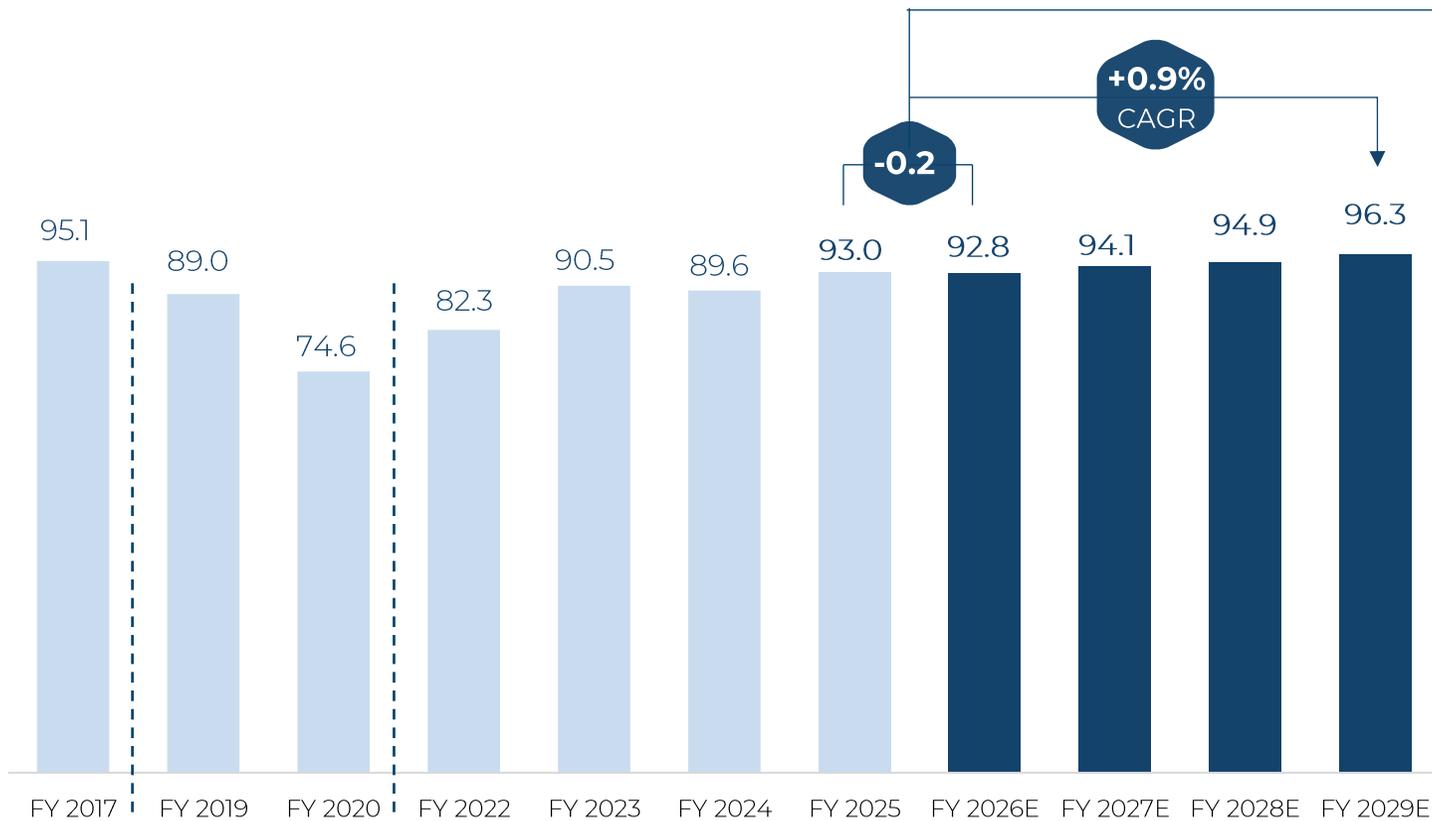
FINANCIAL OVERVIEW

OUTLOOK AND REMARKS

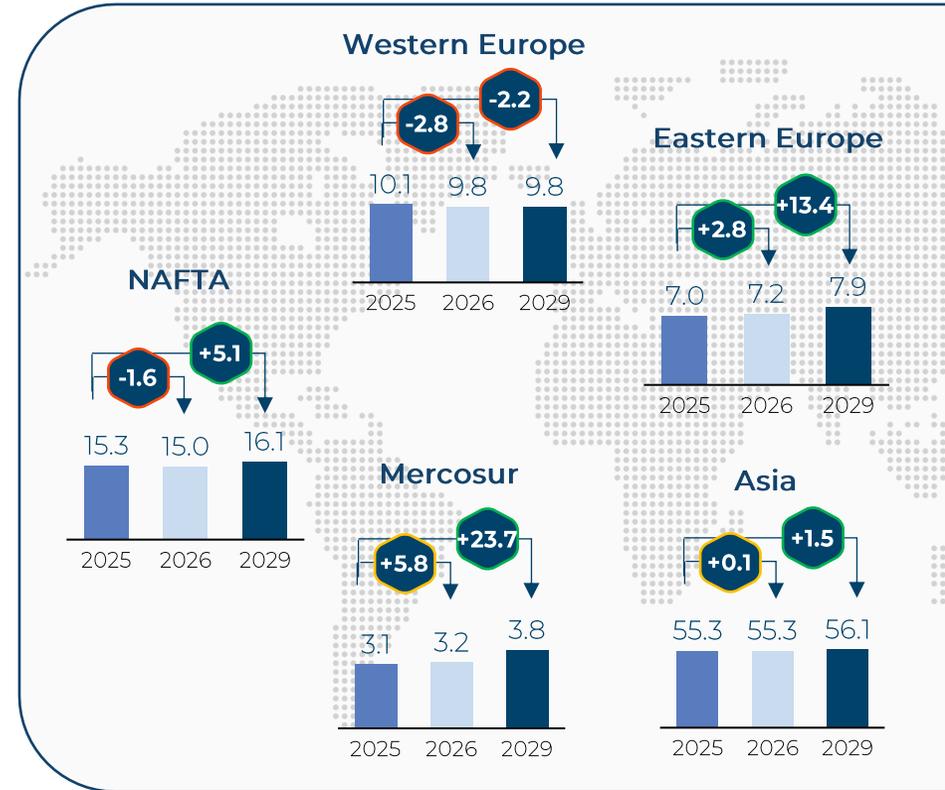
FOLLOWING UPWARD REVISIONS IN 2025... 2026 EXPECTED TO BE FLAT Gestamp

S&P does not forecast market growth for 2026. Nevertheless, macro context remains highly uncertain with key regulation expected to be approved within the coming months in Europe and NAFTA which could change medium-term outlook

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



Market dynamics are expected to continue **different** in each region...



1. Production volumes in IHS geographies according to S&P Global Mobility data as of February 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M02]. All rights reserved

2026 EXPECTED TO BE VERY SIMILAR TO 2025

2026 NOT BRINGING TOO MANY CHANGES TO THE CONTEXT

1. Limited volume growth in key geographies
2. Major regulatory changes expected to be announced in NAFTA and Europe
3. Cost pressure expected
4. Slower EV adoption...though with less volatility

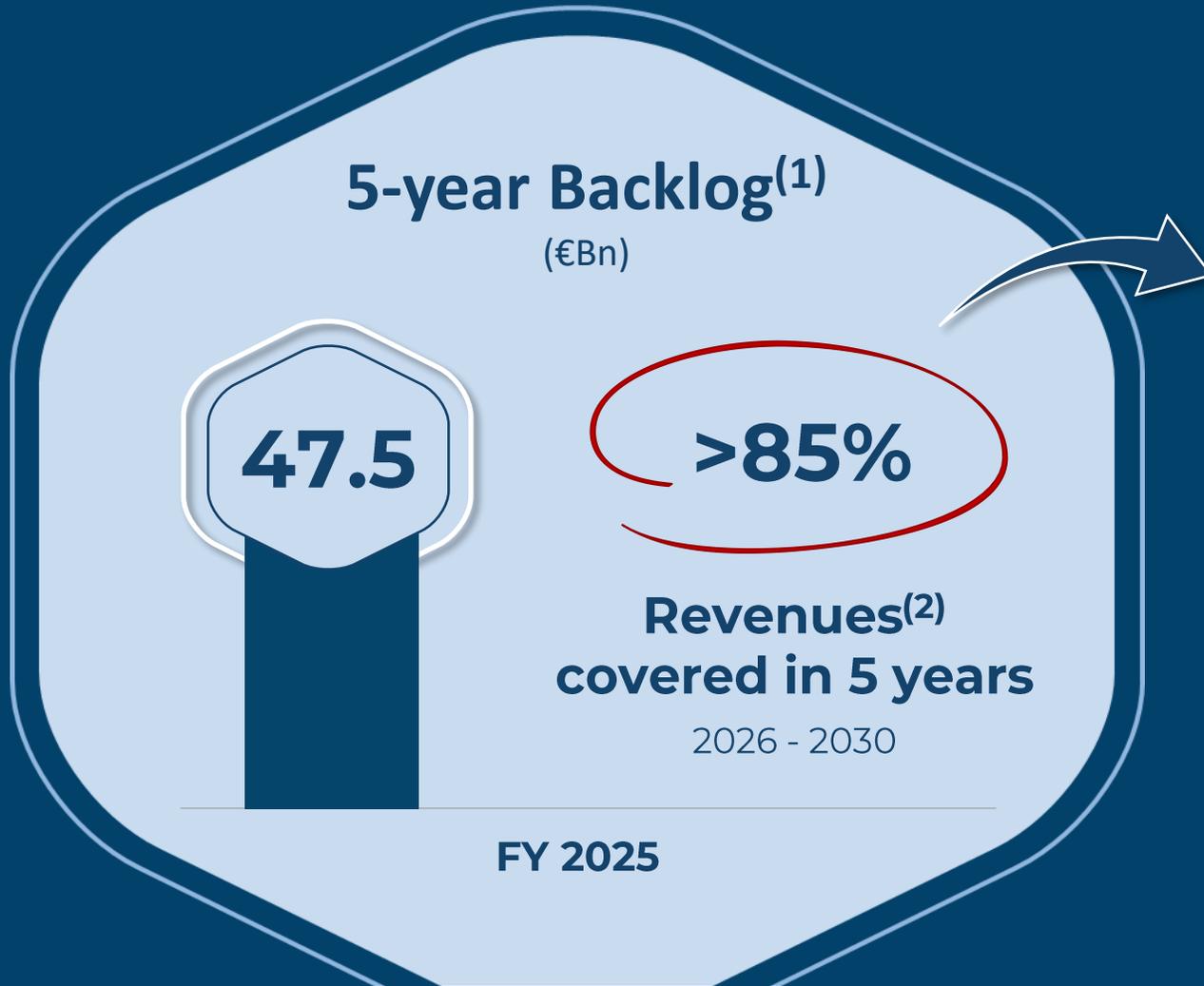
1 SOLID BACKLOG EXECUTION

2 FOCUSING ON IMPROVING PROFITABILITY DESPITE VOLUME PRESSURE

3 BALANCE SHEET STRENGTH AND FLEXIBILITY

4 MEETING FULL YEAR 2026 GUIDANCE

A SOLID 5-YEAR BACKLOG



5 YEAR BACKLOG MARKED BY

-  Volume pressure in certain key geographies
-  Certain OEMs rethinking their strategies, particularly around pace of EV adoption
-  Negative Forex assumption

CHANGE IN MIX

**INCREASING WEIGHT OF
CARRYOVERS WITH A LESS CAPITAL-INTENSIVE
PROFILE**

**CONSERVATIVE
APPROACH**

**ENSURING PROFITABILITY TO
MITIGATE RISKS**

**CLIENT & FOOTPRINT
DIVERSIFICATION**

**SECURING BUSINESS WITH
NEW OEMS**

1. Represents sales of parts that the company expects to record, including production and awarded business, over the period

2. Revenues excluding revenues from Gescrap, as well as scrap, tooling and prototypes

TO CONTINUE WORKING ON PROFITABILITY WITH A CLEAR ROADMAP

In an environment of limited market growth ENSURING PROFITABILITY TO MITIGATE RISKS

EFFICIENCY

Fixed costs control at all levels (corporate, division...) ensuring profitability

FLEXIBILITY

Rightsizing operations and reevaluating capacity to become more flexible

Constructive Client negotiations in all Gestamp regions

NEGOTIATIONS

RIGHTSIZING



PHOENIX

A dynamic and consistent plan to structurally improved profitability levels in our NAFTA region

Positive FCF generation

Every year between 2020 -2025⁽¹⁾



Leverage Ratio

1.4x

Net Debt to EBITDA

Strong Balance Sheet

Granting flexibility and optionality going forward



1. Excluding Phoenix Plan impact on P&L of €15.9m & CAPEX of €12.8m in FY 2025 and impact on P&L of €24.9m & CAPEX of €6.2m in FY 2024

ENSURING PROFITABILITY TO MITIGATE RISKS

Focus on strategic actions to mitigate limited volume growth

Group EBITDA Margin ⁽¹⁾

>11.7% at YE 2026

Auto
>11.9%
at YE 2026

Gescrap
>7.4%
at YE 2026

A LESS CAPITAL-INTENSIVE BUSINESS PROFILE

A clear roadmap to ensure a well balance equilibrium between profitability and investing for growth

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

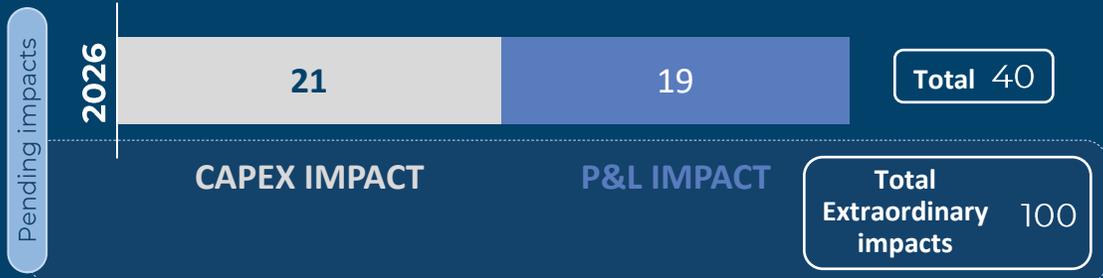
2. Operating cash flow defined as reported EBITDA minus net cash capex (investment minus asset disposals). Group operating cash flow conversion defined as operating cash flow over EBITDA

PHOENIX

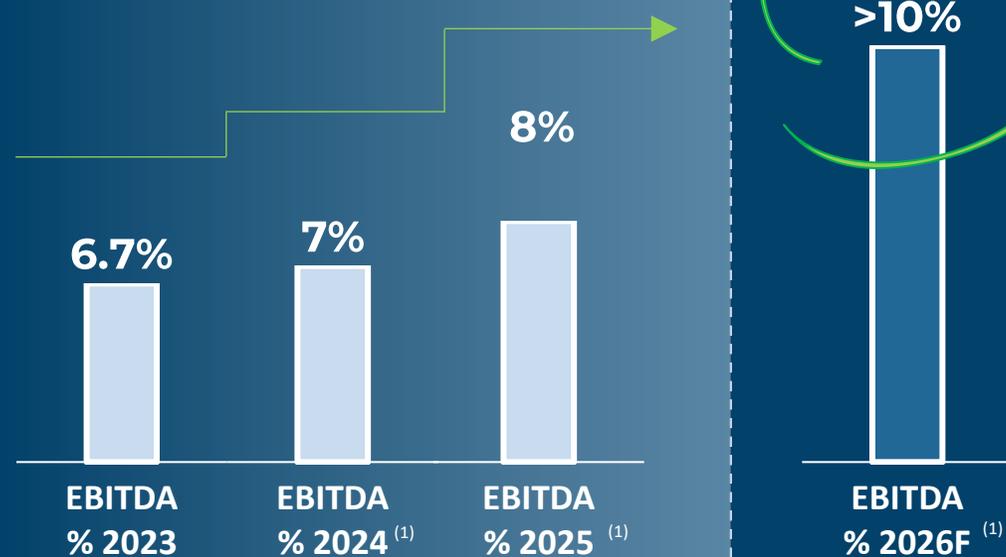
2026 TARGET

FOR 2026, THE FOCUS IS ON COMPLETING THE PLAN AND CONSOLIDATING ALL IMPLEMENTED KEY INITIATIVES

2026 Extraordinary Phoenix Costs (In €m)



Strong Track Record



1. Excluding Phoenix costs related to P&L impact

CLOSING REMARKS



2026

PHOENIX

FY 2025

Solid results: achieving targets for the year

With a clear roadmap to reinforce our positioning

360° Plan on track on a complex market environment

GESTAMP

THE PARTNER SUPPLIER



www.gestamp.com



FINANCIAL PERFORMANCE IN Q4 2025

(In €m)	Q4 2024 Reported	Q4 2025 Reported	Q4 2024 Excluding Phoenix ⁽²⁾	Q4 2025 Excluding Phoenix ⁽²⁾
Total Revenue	3,074	2,863	3,074	2,863
EBITDA	358	382	367	386
EBITDA margin (%)	11.7%	13.4%	11.9%	13.5%
EBIT	177	148	185	151
EBIT margin (%)	5.7%	5.2%	6.0%	5.3%
Net Income	62	48		
FCF⁽¹⁾	338	313	348	320
Net Debt	2,097	1,821		

Reported revenues have decreased by -6.9%⁽³⁾ YoY in Q4 2025
Reported EBITDA has increased by +6.6% 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 Q4 2025 on P&L of €3.8m & CAPEX of €2.6m and in Q4 2024 on P&L of €8.1m & CAPEX of €2.4m related to restructuring of NAFTA business announced in FY 2023
3. Revenues for the Auto Business (excluding Gescrap) at FX constant have declined by -2.4% YoY in Q4 2025

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, 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 and share repurchases
- **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 (excluding extraordinary impacts) 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)
- **Operating cash flow:** defined as reported EBITDA minus net cash capex (defined as gross capex minus cash collected from asset disposals)
- **Net cash capex:** investments in fixed assets, plus capitalized R&D minus asset disposals
- **Operating cash flow: conversion:** defined as operating cash flow over EBITDA