Gestamp

9M 2026

RESULTS PRESENTATION

NOVEMBER 04TH, 2026

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KEY HIGHLIGHTS OF 9M 2026

REVENUES

€8,432m

Flat Organic Growth

EBITDA[1]

€954m

11.3%[1] Margin

(+27bps YoY)

LEVERAGE

1.4x

Ensuring Balance Sheet strength

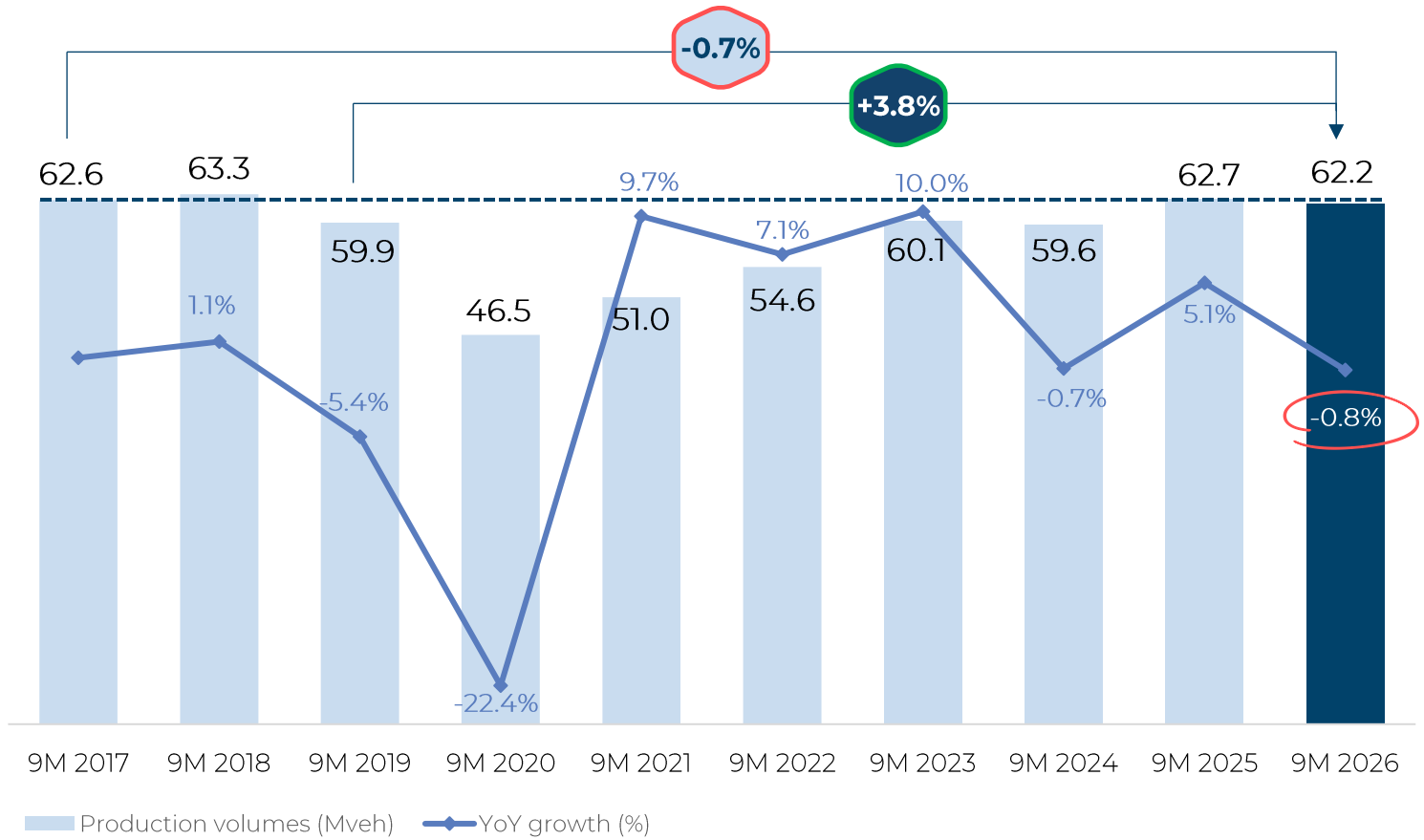
Solid 9M 2026 results providing strong visibility for the year

1. Excluding Phoenix Plan impact on P&L of €17.9m in 9M 2026 and of €12.2m in 9M 2025

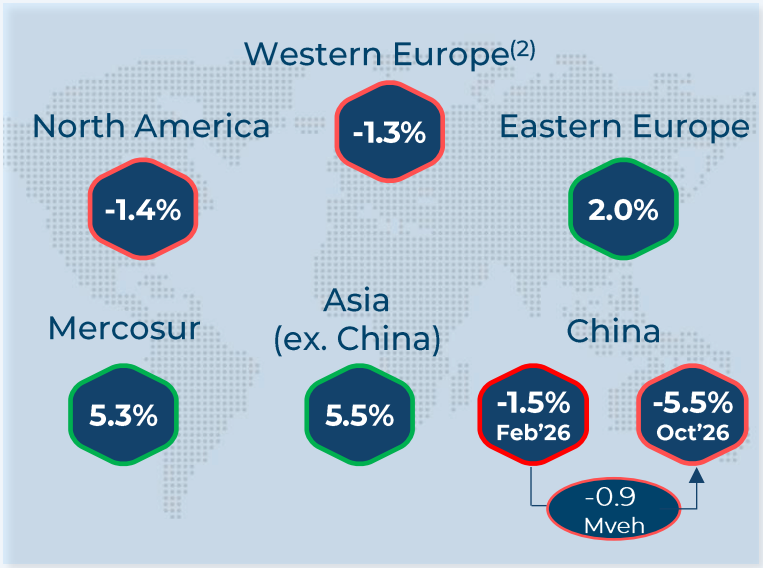
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SLIGHT DECREASE IN 9M 2026 AUTO PRODUCTION

Light Vehicle Production Volumes[1]



9M 2026 by Region – YoY Evolution



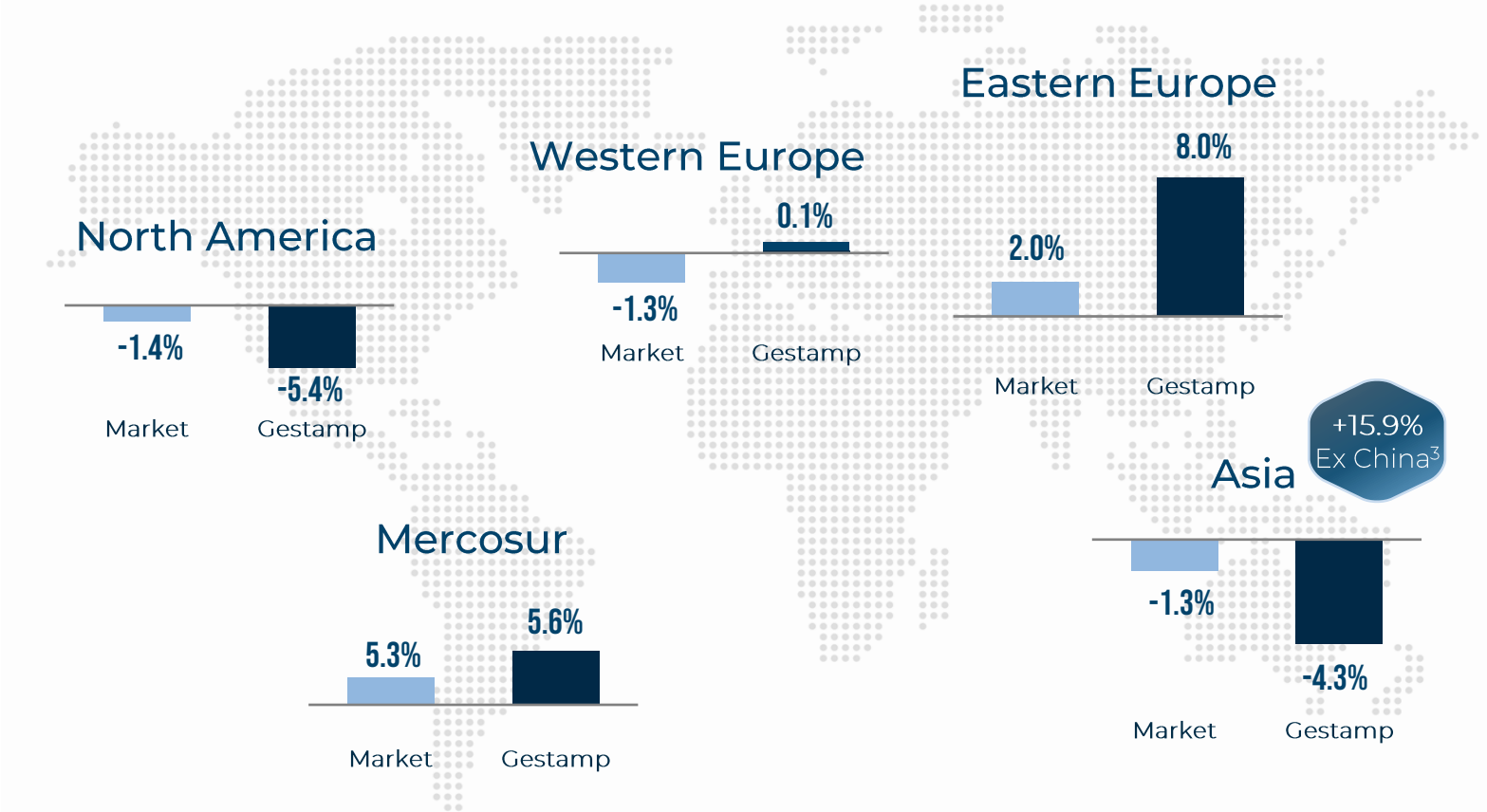
Market volumes slightly down YoY in 9M 2026 with mixed regional dynamics

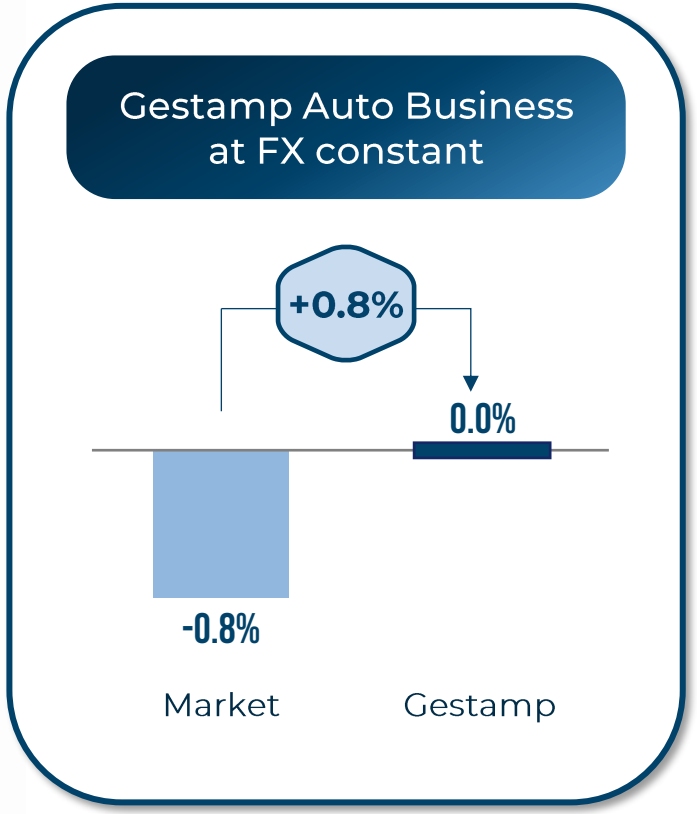
1. Production volumes in Gestamp's footprint according to S&P Global Mobility data as of October 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M10]. All rights reserved
2. Western Europe data includes Morocco in line with our reporting

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GESTAMP REVENUES PERFORMANCE COMPARED TO THE MARKET

9M 2026 Gestamp Auto Business Revenue Growth at FX Constant[1] vs. Market Production Growth in Gestamp Footprint





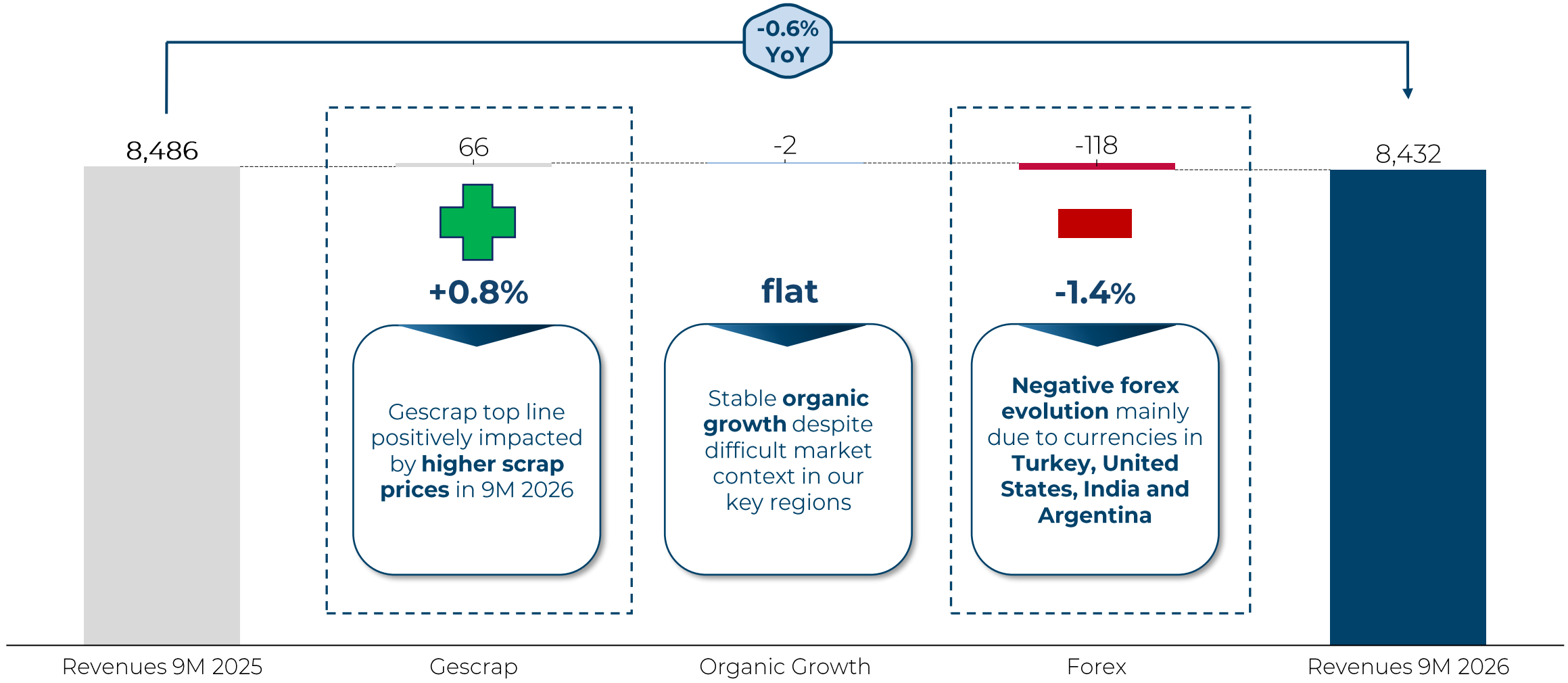
Outperformance of **+0.2 p.p. on a weighted basis**[2] at FX constant in 9M 2026

1. Gestamp's organic growth (excluding Gescrap) at FX constant used for comparability with production volumes. Production volumes in Gestamp's footprint as of October 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M10]. All rights reserved. Western Europe data includes Morocco in line with our reporting
2. Market and Gestamp weighted growth measured with 9M 2025 geographical weights as a base
3. Outperformance calculated excluding China

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POSITIVE BUSINESS PERFORMANCE

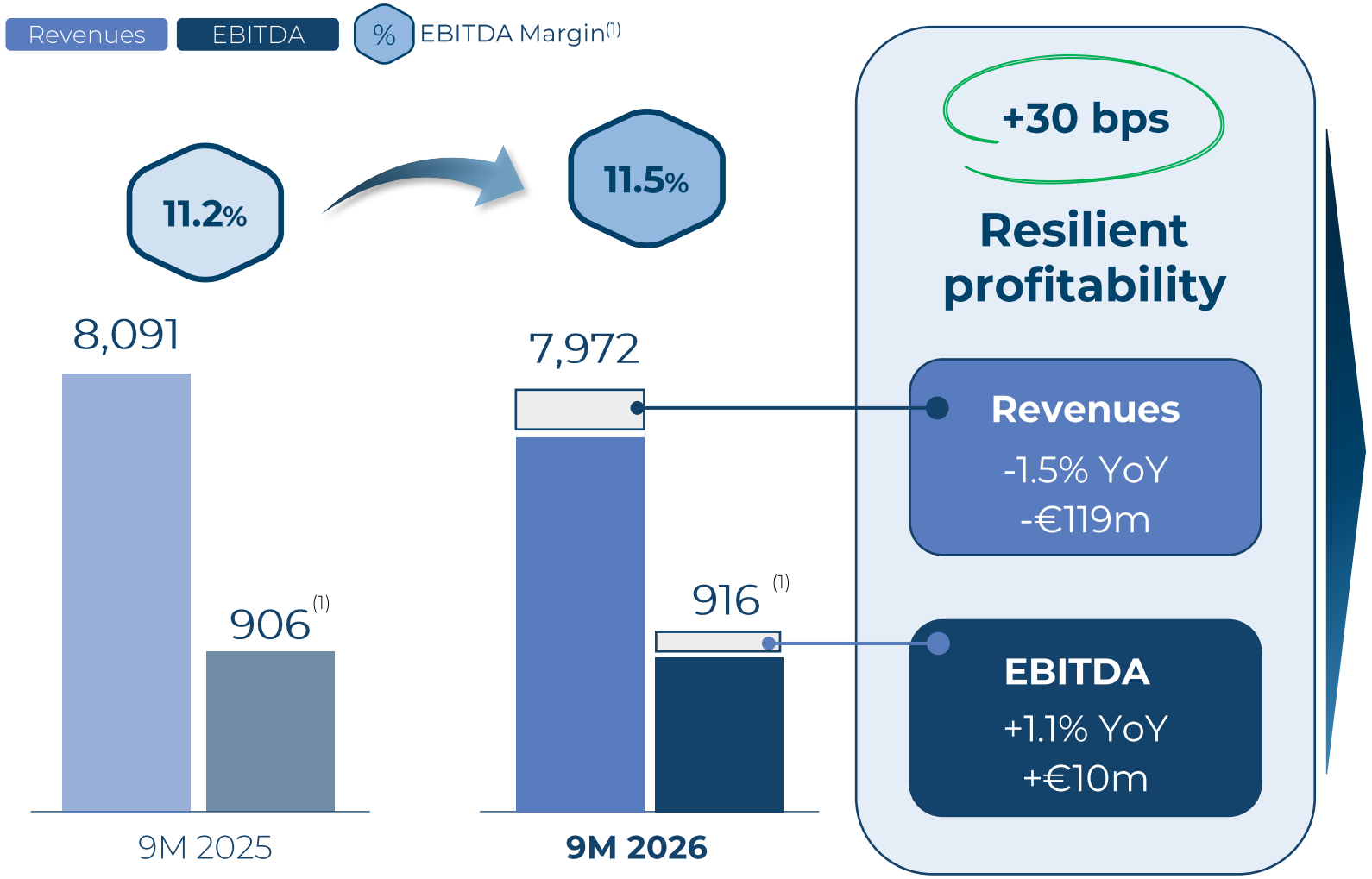
YoY Reported Revenue (€m) Bridge Chart



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BUSINESS RESILIENCE SUPPORTING PROFITABILITY GROWTH

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



Further margin improvement despite challenging market conditions

- **Rightsizing** operations and reevaluating capacity to become more **flexible**
- Continued execution of **cost reduction**, **efficiency** measures and **productivity** initiatives
- Constructive **customer negotiations**
- Delivering on PHOENIX turnaround

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

1. Excluding Phoenix Plan impact on P&L of €17.9m in 9M 2026 and of €12.2m in 9M 2025

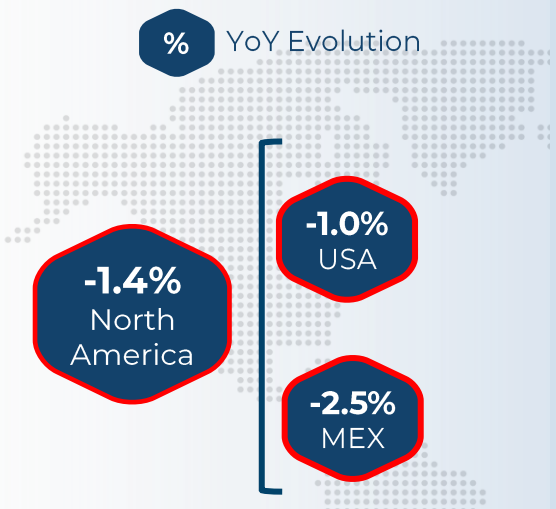
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PHOENIX PLAN BRINGING VISIBILITY TO REACH 2026 GUIDANCE

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In a low-growth market Environment

Production volumes in North America [1]



9M 2026

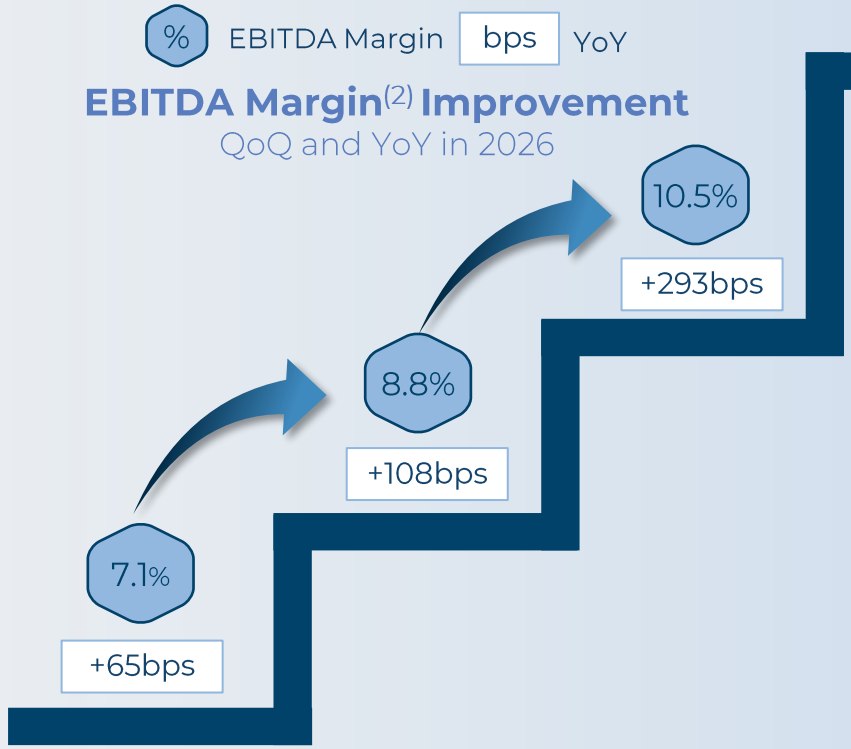
North America excluding Phoenix Extraordinary Plan

9M 2026 Extraordinary impacts

P&L	€17.9m
CAPEX	€13.7m

c.**80%** Incurred of Total 2026 Impacts

EBITDA Margin[2] Improvement
QoQ and YoY in 2026



FY 2026

>10%

FY 2026E EBITDA Margin

Committed to deliver on our 2026 target



Sequential and YoY Margin improvement along the year; on track to achieve FY guidance on Q4 seasonal strength

1. Production volumes in Gestamp's footprint according to S&P Global Mobility data as of October 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M10]. All rights reserved
2. Excluding Phoenix Plan impact on P&L of €3.4m in Q1 2026, €7.5m in Q2 2026 and of €7.0m in Q3 2026

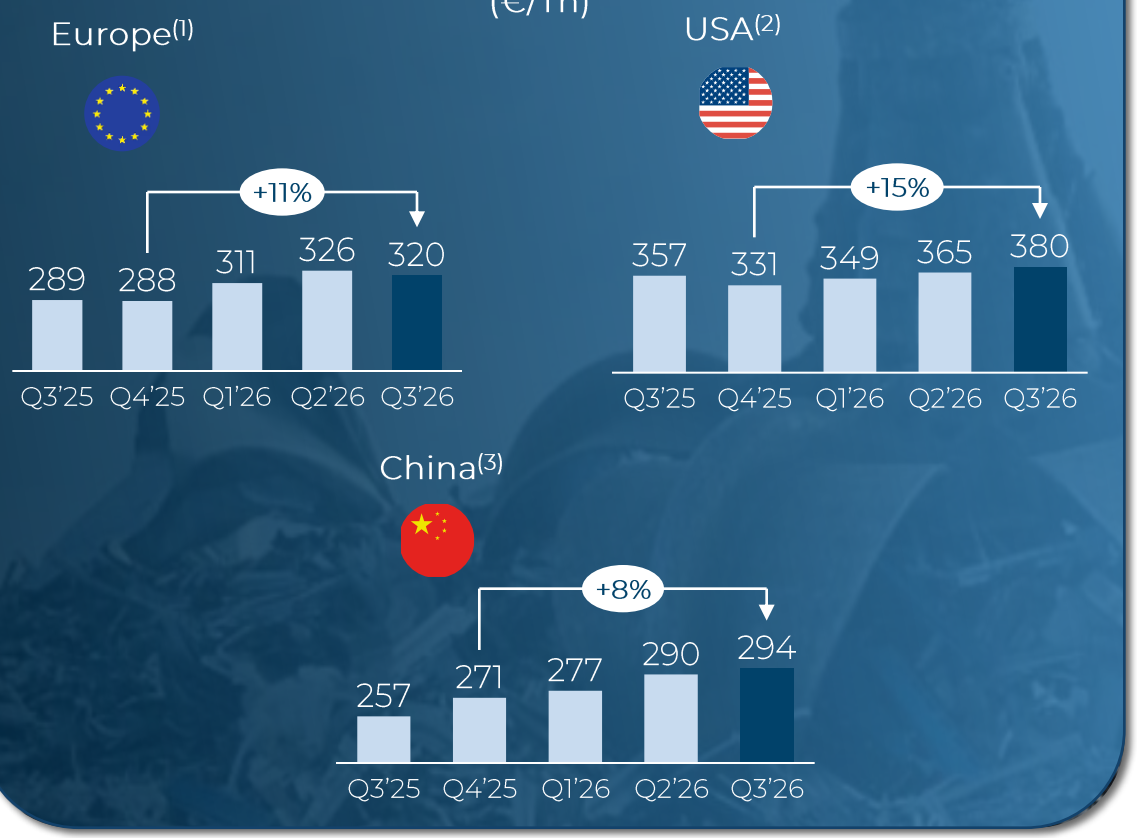
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GESCRAP: IMPROVING MARKET CONDITIONS DRIVING STRONG PERFORMANCE

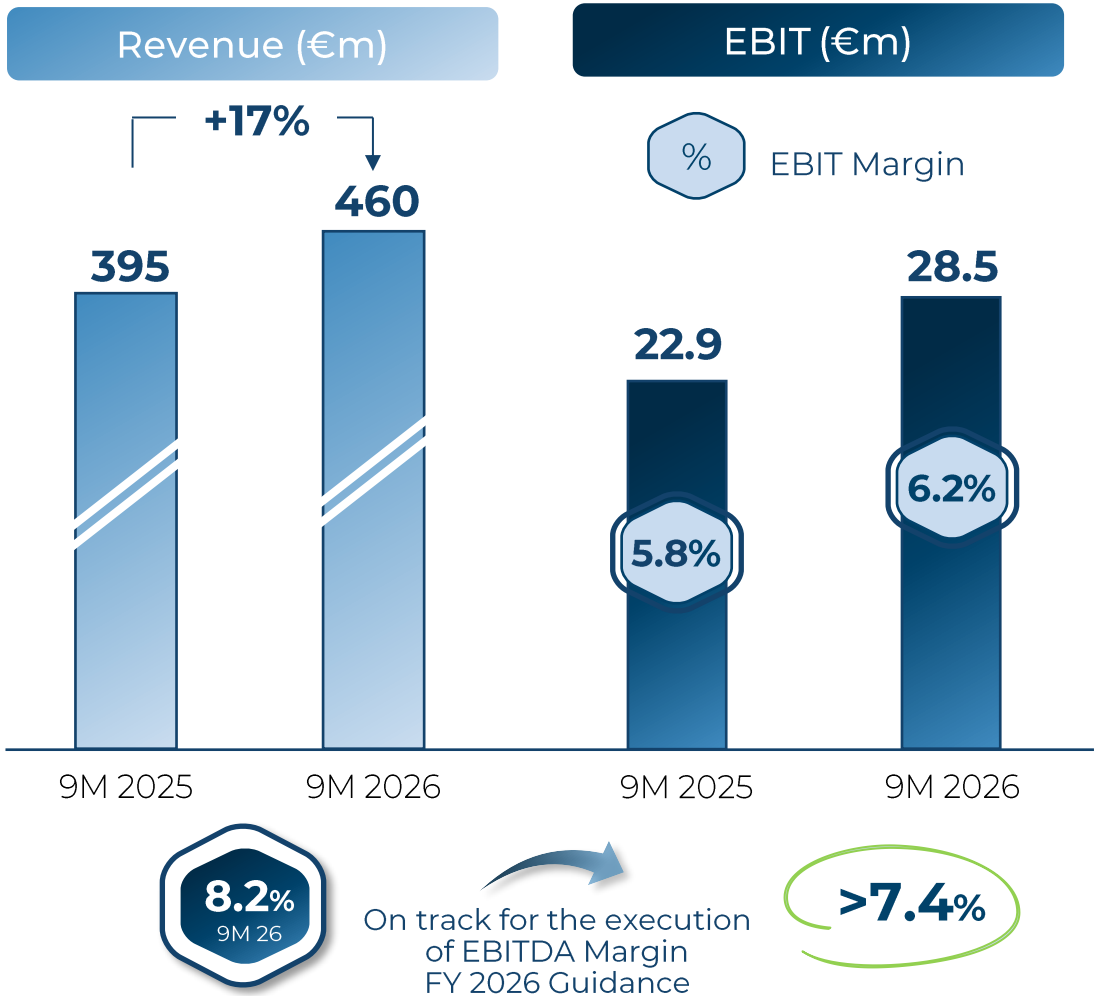
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Scrap prices have increased substantially compared to year-end 2025 levels

(€/Tn)



Improving market conditions driving to a significant performance improvement



Source: Bloomberg as of October 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 of 1,783k Tons as of 9M 2026 and 1,626kTons as of 9M 2025

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FINANCIAL PERFORMANCE IN 9M 2026

(In €m)	9M 2025 Reported	9M 2026 Reported	9M 2025 Excluding Phoenix[2]	9M 2026 Excluding Phoenix[2]
Total Revenue	8,486	8,432	8,486	8,432
EBITDA	925	936	937	954
EBITDA margin (%)	10.9%	11.1%	11.0%	11.3%
EBIT	399	382	411	400
EBIT margin (%)	4.7%	4.5%	4.8%	4.7%
Net Income	104	141		
FCF[1]	-64	-15	-41	17
Net Debt	2,107	1,908		

Reported revenues have decreased by -0.6%[3] YoY in 9M 2026
Reported EBITDA has increased by +1.2% YoY

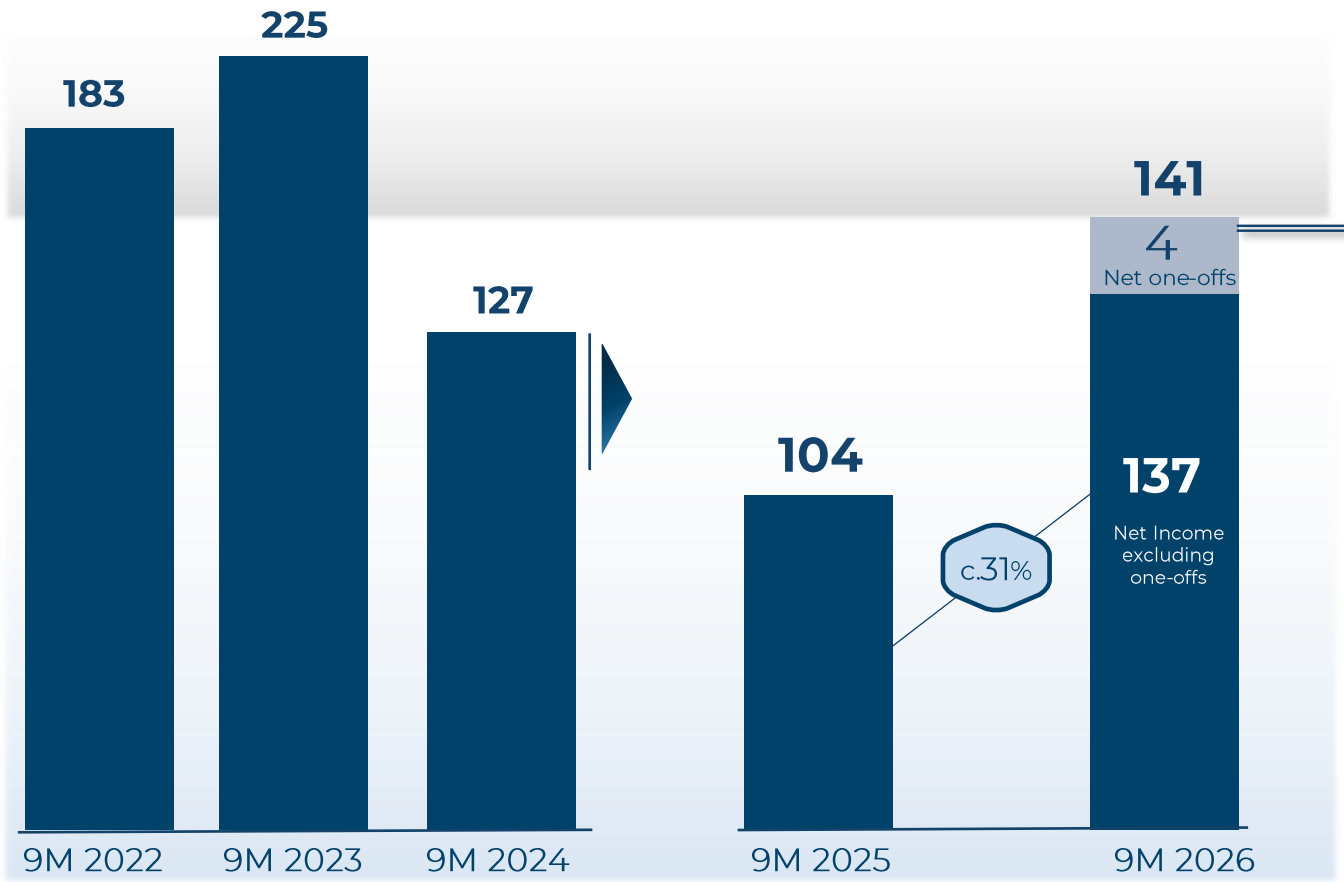
Note: All figures including IFRS 16
1. FCF calculated as change in net debt excluding acquisitions, dividends, share repurchases and a neutral forex (calculated by including exchange gains and losses, hyperinflation effect and certain translation differences with equity impact)
2. Phoenix Plan impact in 9M 2026 on P&L of €17.9m & CAPEX of €13.7m and in 9M 2025 on P&L of €12.2m & CAPEX of €10.2m related to restructuring of North America business announced in FY 2023
3. Revenues for the Auto Business (excluding Gescrap) at FX constant are stable (0.0% YoY) in 9M 2026

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SIGNIFICANT 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

+ €20m 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 a €5m positive impact at EBT level or €4m 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 (%)	
	9M 2025	9M 2026	VAR. (%)	9M 2025	9M 2026	VAR. (%)	9M 2025	9M 2026
Western Europe	3,001	2,997	-0.1%	298	298	0.0%	9.9	9.9
Eastern Europe	1,418	1,437	+1.3%	216	220	+2.0%	15.2	15.3
North America[1]	1,730	1,625	-6.1%	125	142	+13.2%	7.2	8.7
Mercosur	604	649	+7.6%	74	83	+13.0%	12.2	12.8
Asia	1,338	1,264	-5.6%	194	174	-10.3%	14.5	13.8
Gescrap	395	460	+16.7%	31	38	+21.0%	7.9	8.2
Gestamp	8,486	8,432	-0.6%	937	954	+1.8%	11.0	11.3

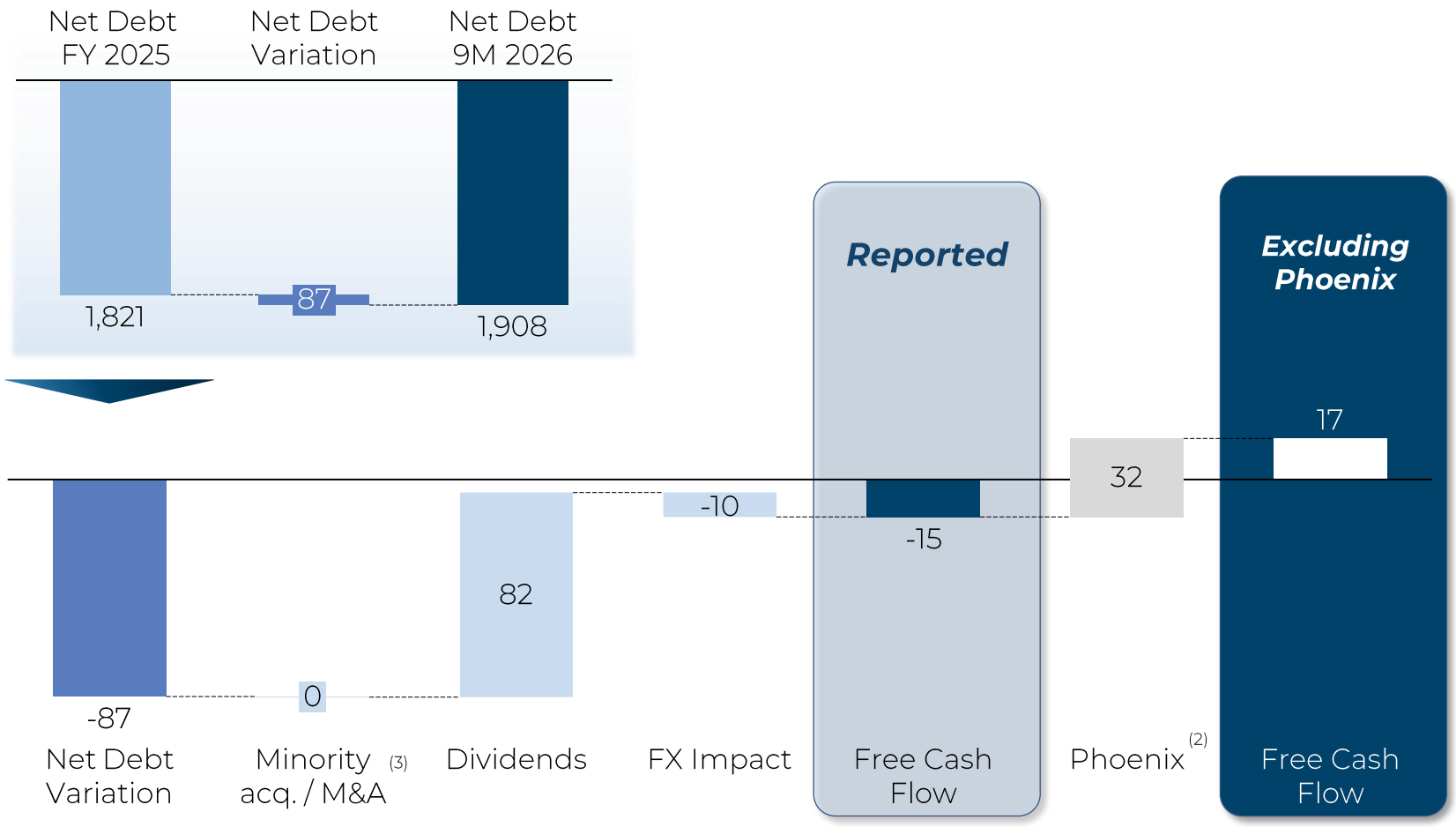
1. North America excluding Phoenix Plan impact on P&L of €17.9m in 9M 2026 and of €12.2m in 9M 2025

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FREE CASH FLOW EVOLUTION IN 9M 2026

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FCF(1) generation of €17m(1,2) in nine month despite third quarter negative business seasonality



Positive FCF generation maintained in 9M 2026

- ❖ Positive FCF achieved in 9M 2026 despite the temporary impact of Q3 seasonality
- ❖ Q3 working capital negative effect due to regular seasonal business dynamics
- ❖ Strong FCF expected in Q4, reversing the temporary Q3 effect

9M 2026 Group Operating Cash Flow Conversion(3)

34%

On track for the execution of the FY 2026 Guidance

c.35%

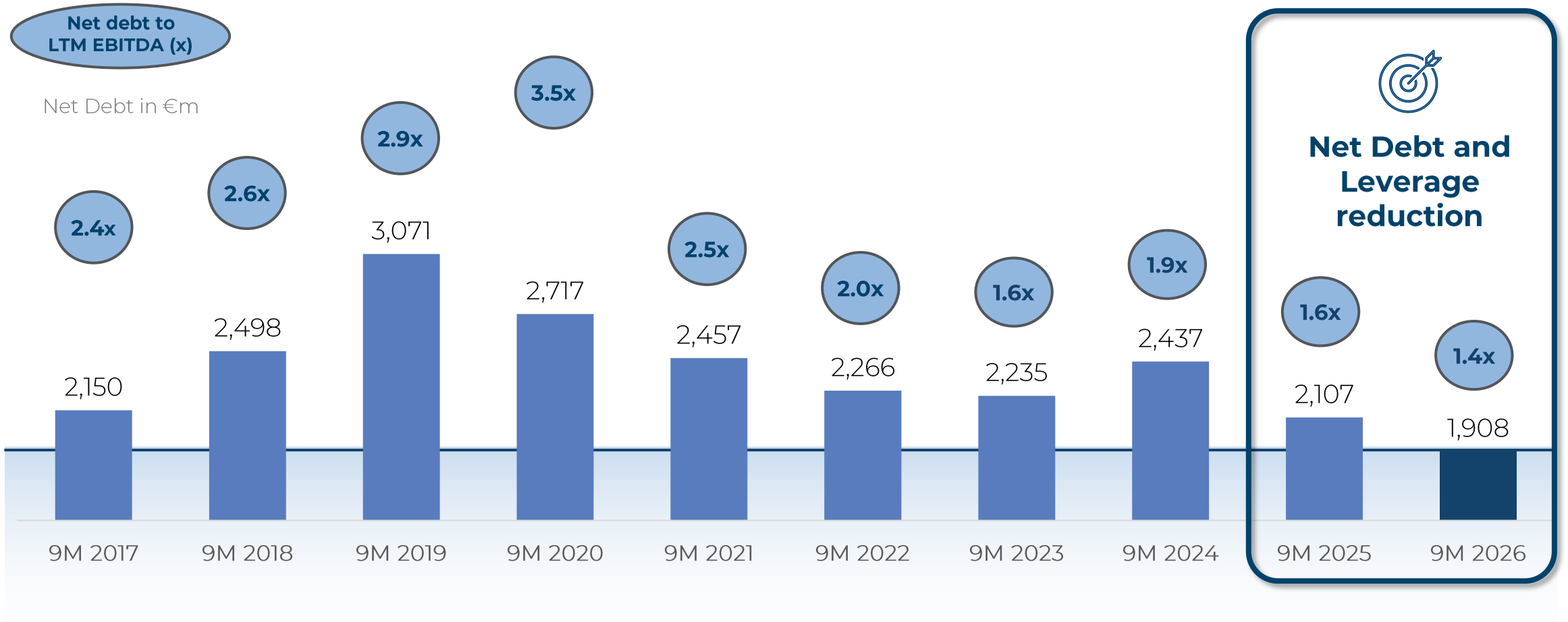
Note: All figures including IFRS 16

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 9M 2026 on P&L of €17.9m and on CAPEX of €13.7m
3. Includes minorities' acquisitions, M&A and equity contributions (Santander partnership signed as of September 2025 with €246m capital injection)

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PRIORITY IS TO PRESERVE OUR FINANCIAL STRENGTH

Maintaining Deleverage Path



Lowest reported Net Debt in a nine-month period since IPO

Note: 2017 & 2018 figures pre-IFRS 16 implementation

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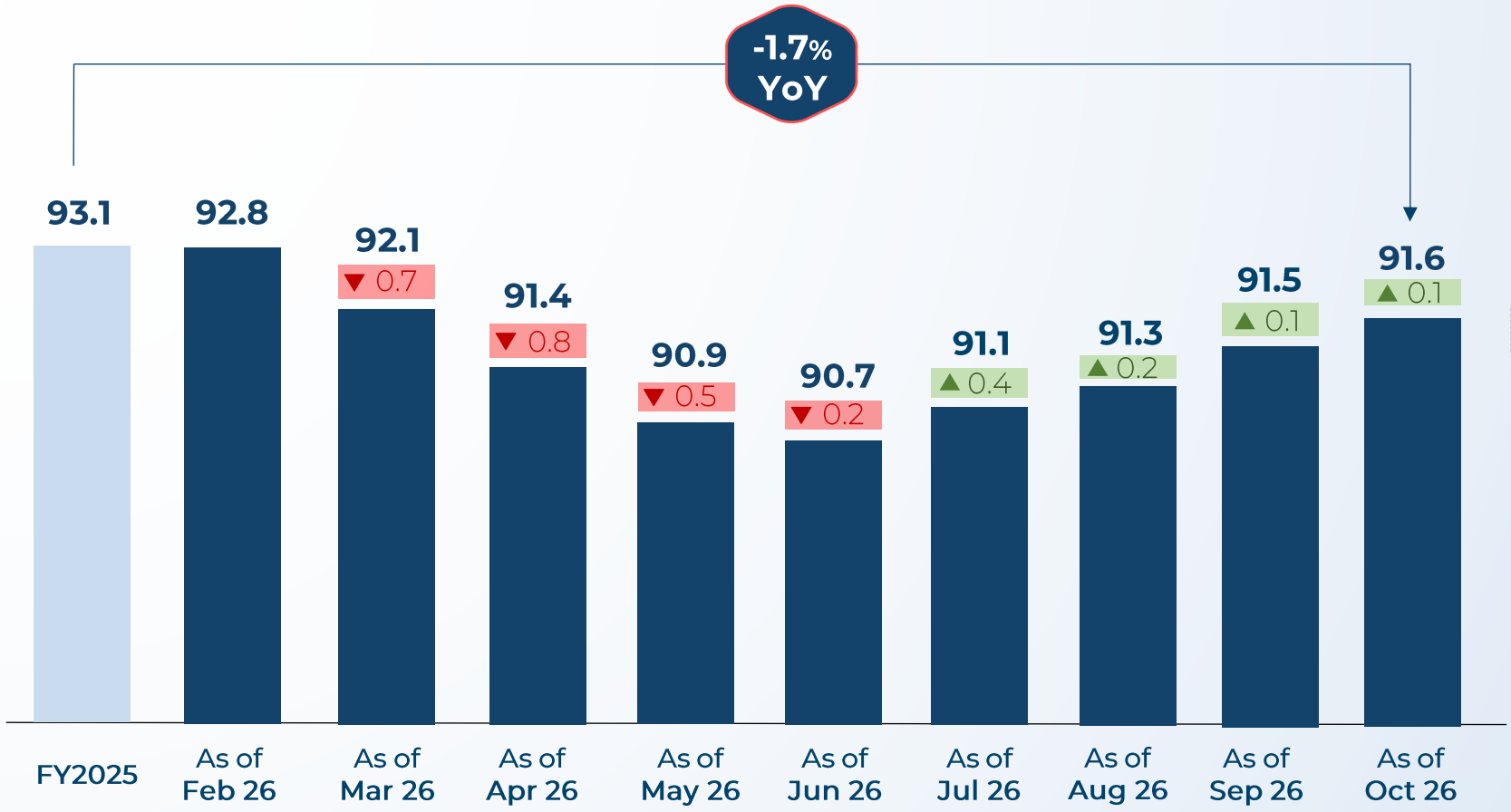
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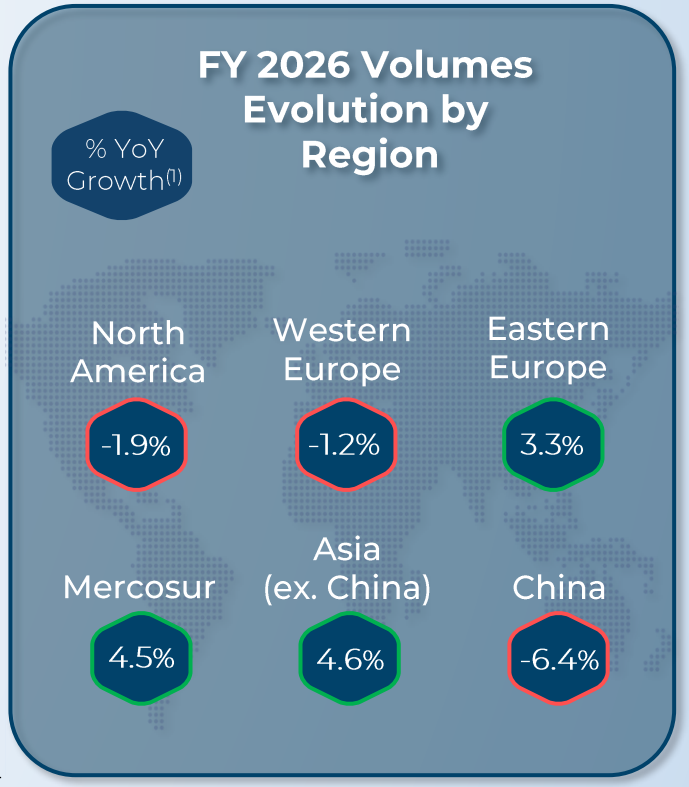
2026 RECOVERY BUT YET TO REACH INITIAL YEAR EXPECTATIONS

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Gradual recovery since June, yet 2026 volumes remain below the 2025 forecast and the early initial expectations

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





1. Production volumes according to S&P Global Mobility data as of October 2026. Includes content supplied by S&P Global Mobility Copyright © [IHS_LV_Production_Bodystyle_Global_2026M10]. All rights reserved

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REINFORCED MARKET POSITIONING AND FINANCIAL PROFILE

Market Context

- Limited Market growth
- Inflationary Pressures
- Regulatory Uncertainty
- Geopolitical Turmoils

PROFITABILITY IMPROVEMENT

- ✓ Operational efficiencies supporting Group margin expansion
- ✓ Delivering on PHOENIX plan
- ✓ Profitable and cash-generative Gescrap business

BALANCE SHEET STRENGTH

- ✓ Positive cash flow generation
- ✓ Low leverage ratio providing financial flexibility and optionality

DIVERSIFIED PORTFOLIO ASSETS

- ✓ Market outperformance amidst mixed auto volumes dynamics
- ✓ Flexible Strategy Across Low- and High-Growth Regions
- ✓ New plants driving a more diversified footprint

Well positioned to navigate uncertainty and capture opportunities

- **Regulatory developments creating potential opportunities**
- **Benefiting from structural industry trends**
- **Financial flexibility supporting strategic optionality**

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GUIDANCE 2026

REITERATING OUR 2026 GUIDANCE

Group EBITDA Margin[1]

>11.7% at YE 2026

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

Delivering on our commitments despite a challenging environment

9M 2026
Solid Performance

Phoenix Plan
Delivering Results

FY 2026
On-track

Balance Sheet
Strong and Flexible

Well positioned to navigate all market scenarios and capture opportunities

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CLEAR ROADMAP FOR THE LONG RUN...



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FINANCIAL PERFORMANCE IN Q3 2026

(In €m)	Q3 2025 Reported	Q3 2026 Reported	Q3 2025 Excluding Phoenix(2)	Q3 2026 Excluding Phoenix(2)
Total Revenue	2,642	2,638	2,642	2,638
EBITDA	284	296	287	303
EBITDA margin (%)	10.7%	11.2%	10.8%	11.5%
EBIT	113	117	116	124
EBIT margin (%)	4.3%	4.4%	4.4%	4.7%
Net Income	30	31		
FCF(1)	-148	-81	-141	-70
Net Debt	2,107	1,908		

Reported revenues have decreased by -0.1%(3) YoY in Q3 2026
Reported EBITDA has increased by 4.2% 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 Q3 2026 on P&L of €7.0m & CAPEX of €4.1m and in Q3 2025 on P&L of €2.7m & CAPEX of €5.2m related to restructuring of North America business announced in FY 2023
3. Revenues for the Auto Business (excluding Gescrap) at FX constant have declined by -2.8% YoY in Q3 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 third 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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