



PASSION CREATES INNOVATION

POLYTEC GROUP

Results H1 2025

Hörsching, 14 August 2025



AGENDA

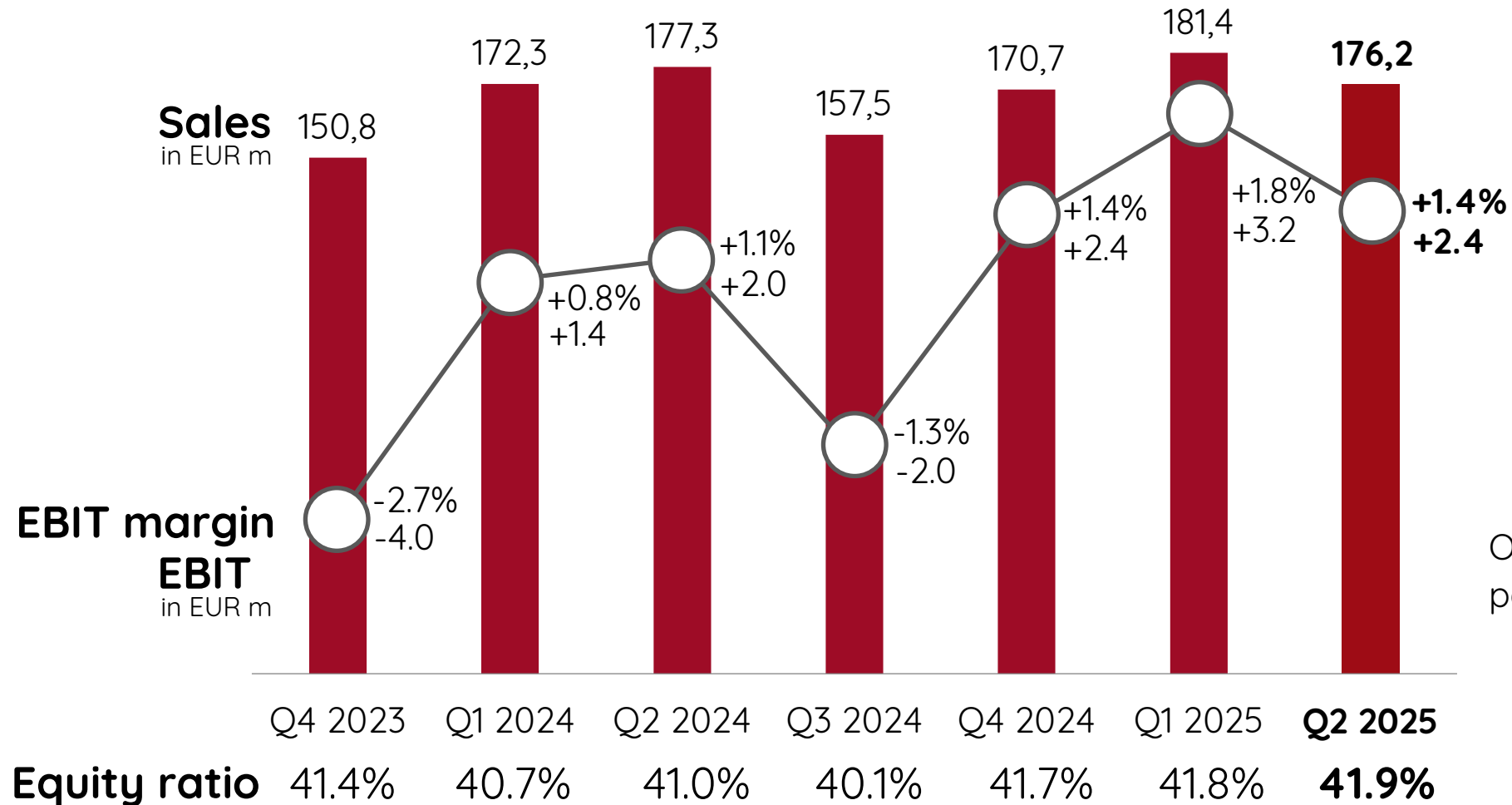
- Financials H1 2025 & Outlook 2025 FY
- Navigating change. Unlocking Potential.
- Appendix
 - Financial figures H1 2025 in detail
 - Automotive Market January to June 2025
 - POLYTEC at a glance

KEY FIGURES H1 2025

- **Group sales revenues amounted to EUR 357.6 million**
(H1 2024: EUR 349.6 million)
- **EBITDA amounted to EUR 21.1 million**
(H1 2024: EUR 19.1 million)
- **EBITDA margin 5.9%**
(H1 2024: 5.5%)
- **EBIT totalled EUR 5.6 million**
(H1 2024: EUR 3.5 million)
- **EBIT margin 1.6%**
(H1 2024: 1.0%)

- **Financial result minus EUR 4.8 million**
(H1 2024: minus EUR 5.8 million)
- **Earnings after tax EUR 1.4 million**
(H1 2024: minus EUR 2.7 million)
- **Earnings per share EUR 0.06**
(H1 2024: minus EUR 0.11)
- **Equity ratio at 41.9%**
(31.12.2024: 41.7%)
- **Employees** (incl. leasing personnel, FTE as at 30.06.2025): **3,606**
(30.06.2024: 3,906)
- One-offs for reduction of personnel included in Q2

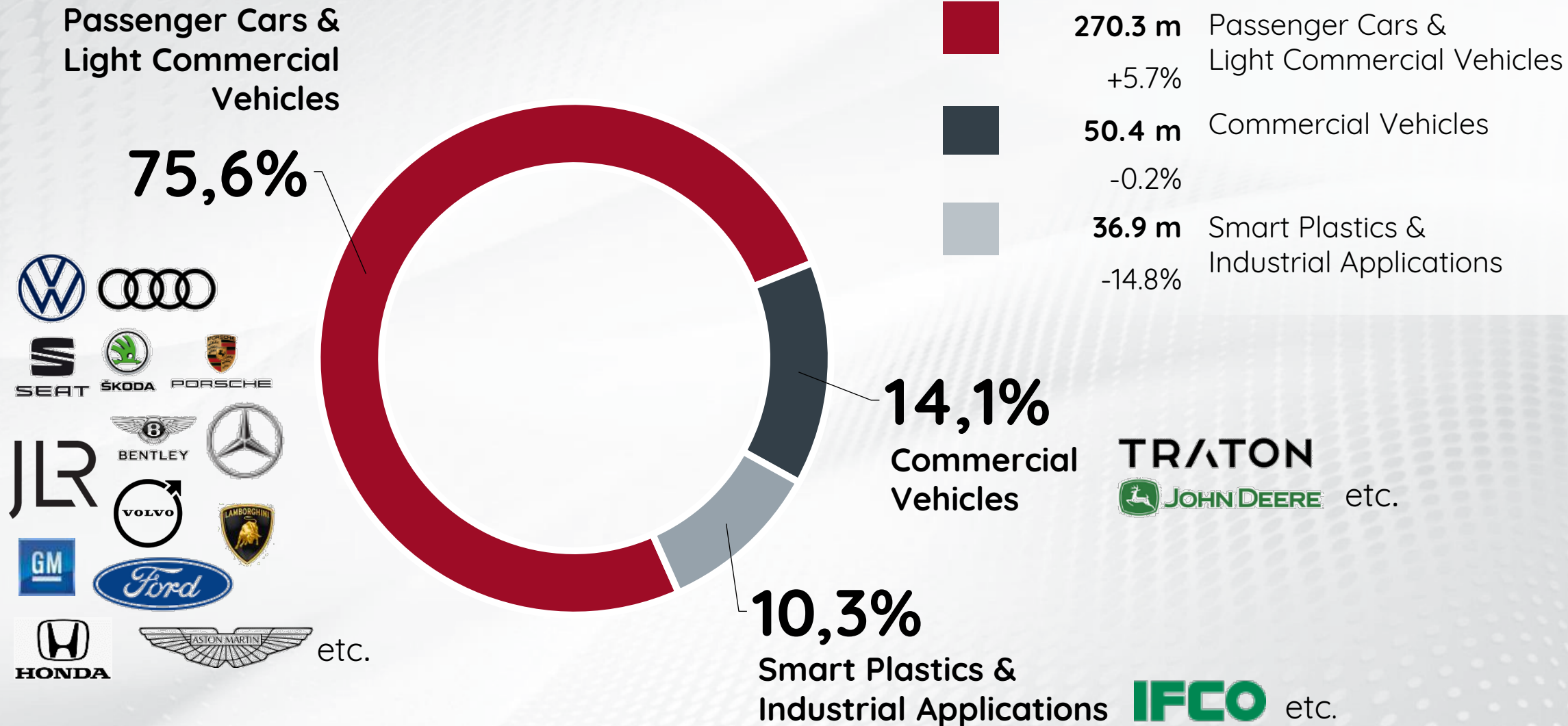
SALES REVENUES, EBIT, EBIT MARGIN, EQUITY RATIO – QUARTERLY



One-offs for reduction of personnel included in Q2

SALES REVENUES BY MARKET AREA

Group Sales: EUR m 357.6



NAVIGATING
CHANGE.
UNLOCKING
POTENTIAL.

PASSION CREATES INNOVATION

NAVIGATING CHANGE.

Persistent uncertainties

MARKT



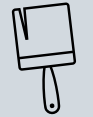
Further decline in car production in Europe of -3% forecast FY2025 vs. FY 2024

(FY 2024 already -6% vs. FY 2023)

'New normality' expected in production figures with approx. 15-16 million vehicles per year in Europe



→ **Overcapacities** at OEMs and suppliers



Painted Exterior segment undergoing major changes

Overcapacities lead to price pressure

Large-scale suppliers are pushing into mid-size niches



Unsteady development especially of electromobility → complicates capacity & investment planning

Reduced quantities, project postponements & cancellations at OEMs



Current customs dispute & geopolitical situation lead to distortions on the financial markets and cause uncertainty among consumers and companies



Interest rates stabilise at a moderate level

NAVIGATING CHANGE

Smart Adaptability

POLYTEC



POLYTEC Group's Sales Revenues H1 25 slightly above H1 24 at 2.3%, driven by tool sales

'Painted exterior' business area requires a disproportionately high capital investment, complexity of niche business leads to disproportionate overhead costs

Work on adjustment of the current product and service portfolio is ongoing to improve strategic orientation and future economic performance.

→ e.g. Local sourcing vs. inhouse production results in significant CAPEX reduction in the UK

→ Weierbach plant: operational turnaround successful at the end of 2024, but no viable continuation scenario can be presented due to market situation.

Therefore, closure of Weierbach plant decided for 1st half of 2026.

No significant commercial impact in 2025, avoidance of future loss situation.



Delay in electromobility, but higher volumes for combustion engines and lifetime extensions

→ less problematic for POLYTEC thanks to cautious investment policy

→ POLYTEC is prepared for a renewed acceleration towards e-mobility

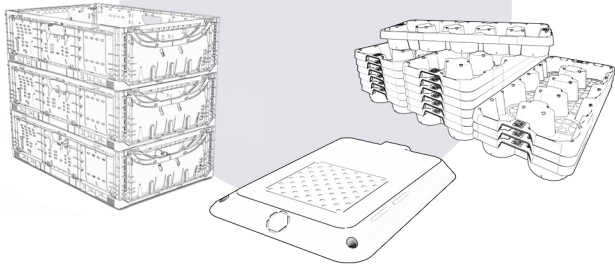


Working Capital increased due to controlled inventory build-up for one specific customer and tooling progress.

PRODUCT LINES

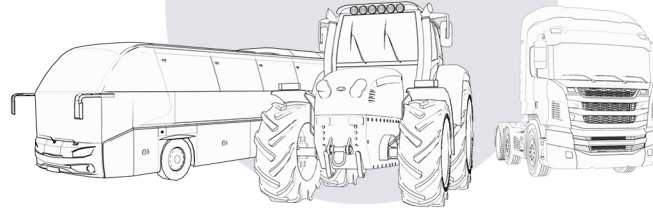
1

SMART PLASTICS &
NEW MOBILITY



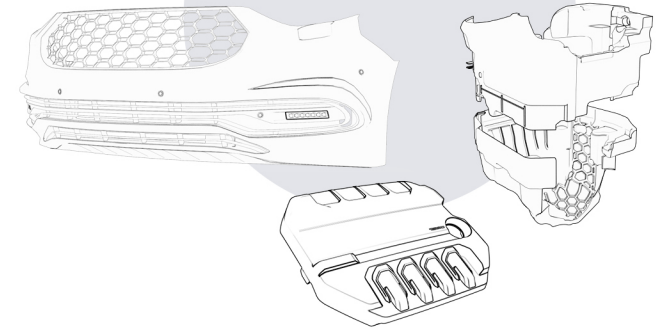
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TRUCK, BUS &
AGRICULTURAL
APPLICATIONS



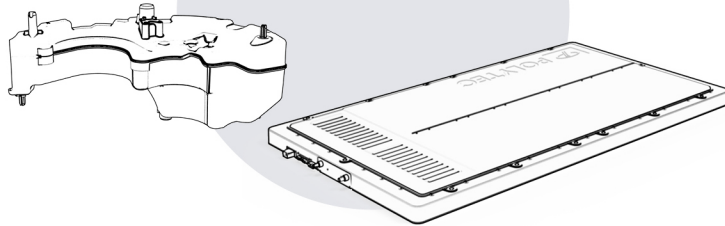
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PAINTED EXTERIOR &
ACOUSTIC SOLUTIONS



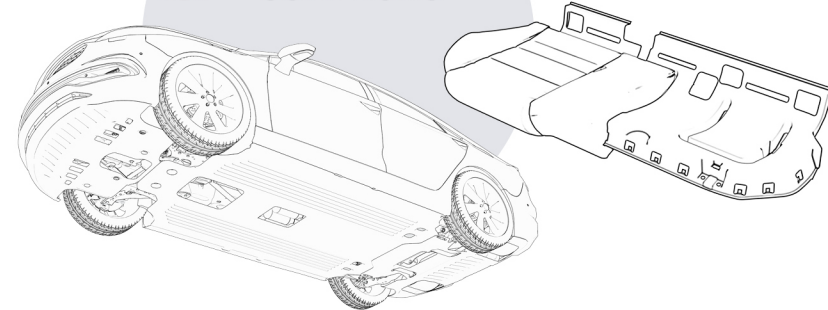
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POWERTRAIN &
BATTERY SOLUTIONS



5

UNDERBODY
SOLUTIONS

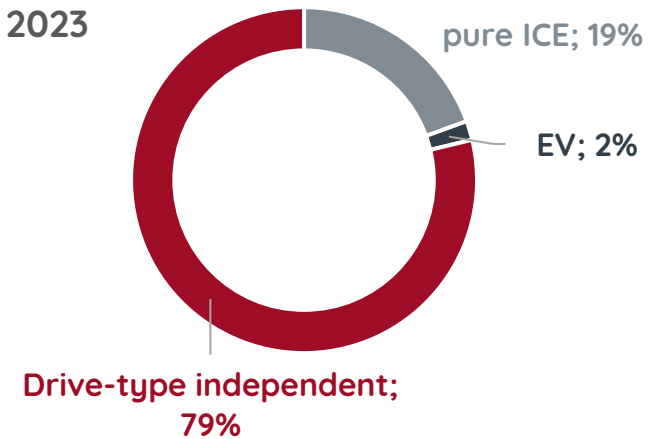


UNLOCKING POTENTIAL

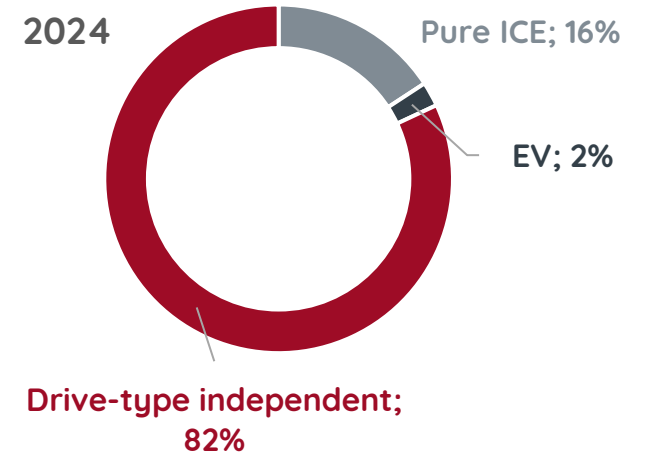
Balanced portfolio, well prepared for electromobility

The current delay in electromobility is having less of a negative impact on POLYTEC due to its **very balanced and largely drive-independent product portfolio**.

2023



2024



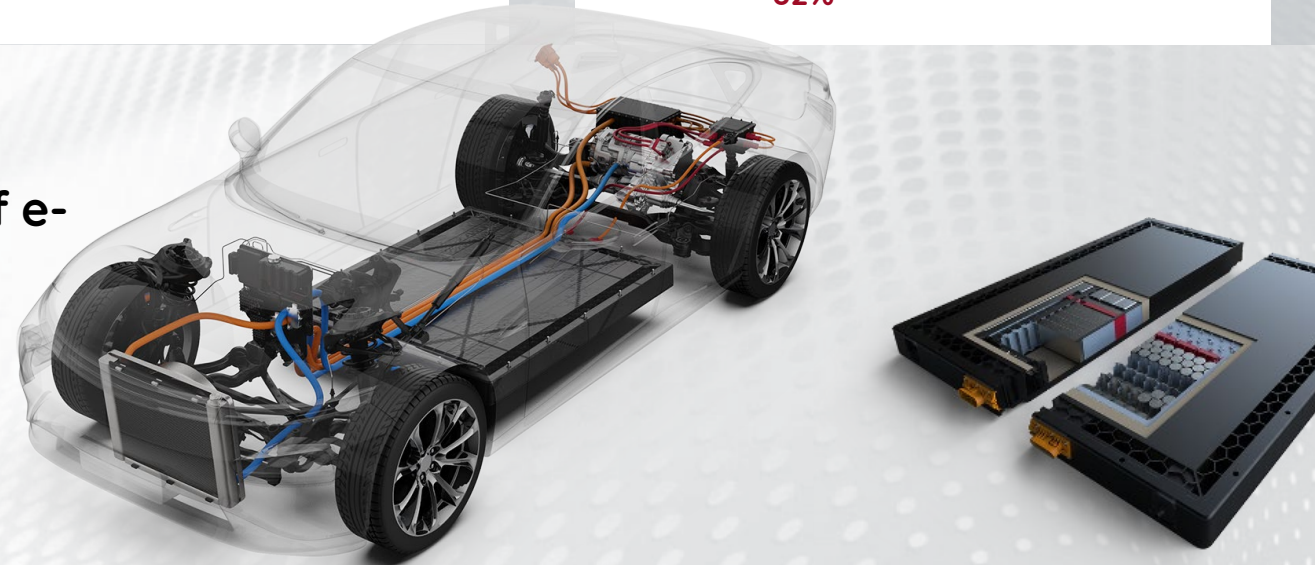
POLYTEC SOLUTION FORCE

POLYTEC is well prepared for the new start of e-mobility with innovative products:

Thermal Management

High Voltage Battery Housing

Underbody Solutions



UNLOCKING POTENTIAL

Beyond Automotive – Confirming Smart Plastic Applications approach



Increasingly important pillar for POLYTEC:
Growth of over 60% vs 2023

Long-term target 30% share of group sales

Zukunftsorientierte Produktsegmente:

Reusable transport packaging

Components for energy storage & energy transfer



BOARD OF DIRECTORS – SINCE 7 JULY 2025



MARKUS HUEMER

CEO

Chairman of the Board

Corporate Strategy, Investment Management, Legal Affairs, IT, Corporate Communications, Sustainability, Sales, Human Resources, Marketing



MARTIN RESCH

COO

Member of the Board

Operations, Program Management, Operations Services, Engineering



MARKUS MÜHLBÖCK

CFO

Member of the Board

Finance, Controlling, Treasury, Accounting, Investor Relations, Purchasing

SUPERVISORY BOARD – SINCE 10 JUNE 2025

Terms of office last until AGM for 2027 FY



FRIEDRICH HUEMER

Chairman
of the Supervisory Board



GÜNTHER APFALTER

Deputy Chairman
of the Supervisory Board



VIKTORIA KICKINGER

Member
of the Supervisory Board



FRED DUSWALD

Member
of the Supervisory Board



BERNHARD MATZNER

Member
of the Supervisory Board

FINANCIAL MARKET

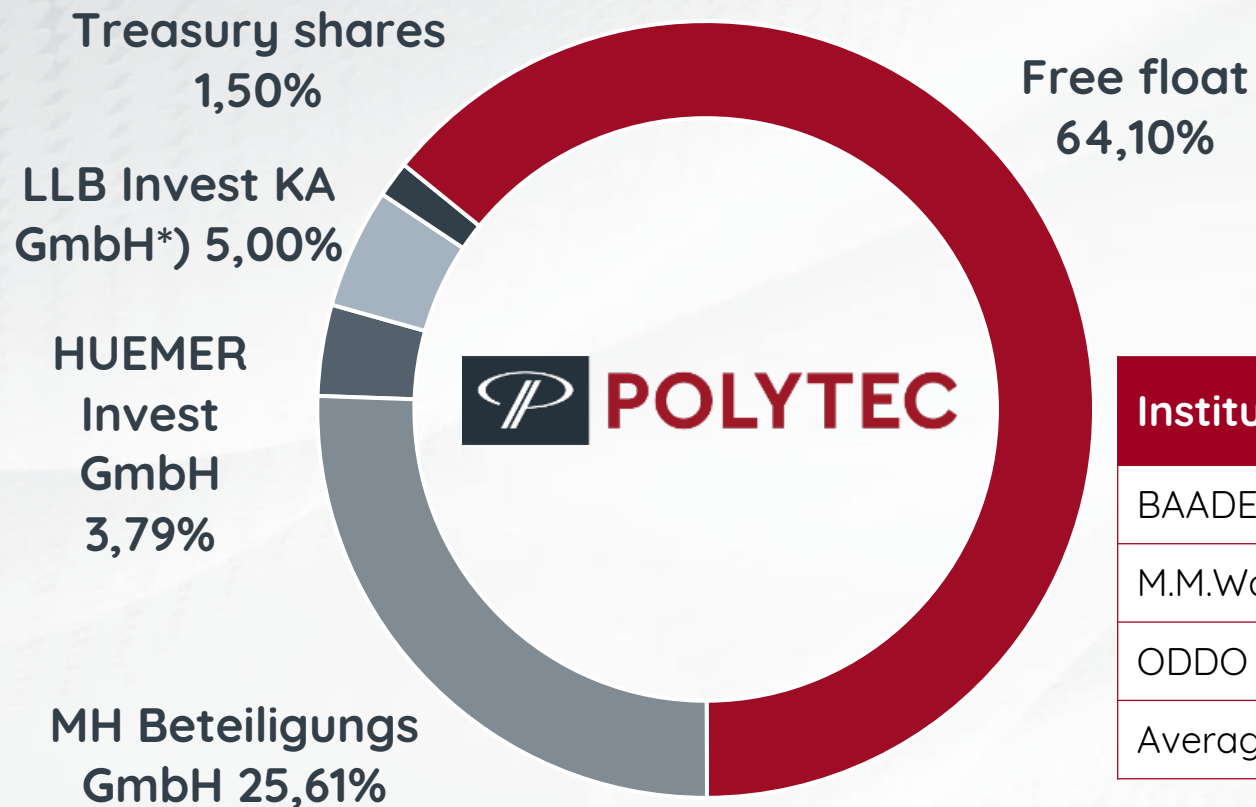


POLYTEC SHARE PRICE PERFORMANCE 2025, YTD 8 AUG. 2025



SHAREHOLDER STRUCTURE SINCE 21 JANUARY 2025

RESEARCH COVERAGE



Institute (last update July 2025)	Rating	Price target
BAADER Research, Munich	Buy	EUR 4.00
M.M.Warburg Research, Hamburg	Buy	EUR 4.90
ODDO BHF SCA Research, Vienna	Outperform	EUR 3.60
Average price target		EUR 4.17

*) Voting rights of 5.00% are indirectly attributable to LLB Invest Kapitalanlagegesellschaft m.b.H. via its funds in accordance with the Austrian Stock Exchange Act 2018.

ROADSHOWS AND INVESTOR CONFERENCES H2-2025



Date

Event

10 September 2025

Presentation at Vienna Stock Exchange Info Day, Vienna

23 September 2025

Attendance on Baader Investment Conference, Munich

25 November 2025

Attendance on German Stock Exchange Equity Forum, Frankfurt

BOOK VALUE EXCEEDING MARKET CAPITALISATION

Market capitalisation:

(as at 08.08.2025)

~ EUR 72 million

MCap/equity:

(as at 08.08.2025/30.06.2025)

~ 34%

Balance sheet total:

501 EUR million

Shareholders' equity:

210 EUR million

Equity ratio:

41.9%

Tangible assets:

222 EUR million

Interest bearing liabilities:

133 EUR million

(as at 30.06.2025)

THE EQUITY STORY OF THE POLYTEC GROUP



OUTLOOK 2025 FY – UNCHANGED

From today's perspective, the management of POLYTEC Holding AG expects planned consolidated sales revenues in the range of EUR 650 million to EUR 700 million for the 2025 financial year and is targeting an EBIT margin of around 2% to 3%.

The measures introduced in previous periods to increase operational efficiency are showing improvements and are expected to take full effect in the course of the year.

In order to optimise the strategic orientation and future economic performance of the POLYTEC GROUP, work is being done to adapt the current production and service portfolio. As a result, the earnings situation is expected to improve further in the medium term.

Due to the significant reduction in net debt and improvement in the financial result in conjunction with an assumed further decline in interest rates, a positive result after tax is targeted for the 2025 financial year.

However, achieving this outlook is subject to uncertainty. The automotive industry continues to be characterised by a volatile market environment, uncertain development of demand and the faltering transformation towards e-mobility.

The POLYTEC GROUP has a strong market position within and outside the automotive sector and is confident for the future.

APPENDIX

PASSION CREATES INNOVATION



FINANCIALS H1 2025 IN DETAIL

KEY FIGURES QUARTERLY – FROM Q2 2024 TO Q2 2025

Key figures quarterly	Unit	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
Sales revenues	EUR m	177.3	157.5	170.7	181.4	176.2
EBITDA	EUR m	10.0	5.7	10.8	10.8	10.3
EBITDA margin (EBITDA/ sales revenues)	%	5.6%	3.6%	6.3%	6.0%	5.8%
EBIT	EUR m	2.0	-2.0	2.4	3.2	2.4
EBIT margin (EBIT/sales revenues)	%	1.1%	-1.3%	1.4%	1.8%	1.4%
Earnings after tax	EUR m	-1.3	-4.6	0.5	1.0	0.4
Earnings per share	EUR	-0.04	-0.21	0.03	0.04	0.01
Investments in fixed assets	EUR m	6.9	5.3	7.9	4.3	6.3
Equity ratio (equity/balance sheet total)	%	41.0%	40.1%	41.7%	41.8%	41.9%
Net working capital (NWC)	EUR m	69.5	64.6	23.0	64.2	42.6
Average capital employed	EUR m	306.7	302.9	288.1	279.2	267.1
Net debt (+)/assets (-)	EUR m	71.1	68.5	42.4	74.0	52.1
Employees (incl. leasing personnel) end of period	FTE	3,906	3,865	3,678	3,709	3,606

CONS. INCOME STATEMENT H1, Q2 2025 VS H1, Q2 2024

in EUR k	01.01. - 30.06.		01.04. - 30.06.	
	2025	2024	2025	2024
Sales revenues	357,627	349,617	176,179	177,338
Other operating income	3,047	2,648	1,405	964
Changes in inventory of finished and unfinished goods	-144	280	-344	-71
Other own work capitalised	262	93	131	64
Expenses for materials and services received	-189,390	-179,072	-90,641	-90,777
Personnel expenses	-118,731	-121,758	-60,104	-60,931
Other operating expenses	-31,563	-31,946	-16,338	-15,893
Deconsolidation result	0	-723	0	-723
Earnings before interest, taxes and depreciation (EBITDA)	21,108	19,139	10,287	9,971
Depreciation	-15,493	-15,672	-7,860	-7,937
Earnings before interest and taxes = operating result (EBIT)	5,616	3,467	2,428	2,034
Interest expense	-4,312	-6,125	-2,178	-3,429
Interest and other financial revenue	189	303	144	217
Financial result	-4,124	-5,822	-2,033	-3,213
Earnings before tax	1,492	-2,355	394	-1,178
Income tax expenses	-123	-364	-30	-92
Earnings after tax	1,369	-2,718	364	-1,270
thereof result of non-controlling interests	113	-370	57	-425
thereof result of the parent company	1,256	-2,348	307	-846
undiluted earnings per share in EUR	0.06	-0.11	0.01	-0.04

CONS. BALANCE SHEET 30.06.2025 VS 31.12.2024

ASSETS

in EUR k	30.06.2025	31.12.2024
A. Non-current assets		
I. Intangible assets	5,900	6,148
II. Goodwill	0	0
III. Tangible assets	221,926	225,877
IV. Non-current financial assets	113	88
V. Contract assets from contracts with customers	27,493	27,250
VI. Deferred tax assets	13,881	12,698
	269,314	272,060
B. Current assets		
I. Inventories	40,614	39,114
II. Trade accounts receivable	61,064	54,299
III. Contract assets from contracts with customers	69,601	58,905
IV. Other current non-financial receivables and assets	8,755	5,977
V. Income tax receivables	1,758	2,325
VI. Other current financial assets	7,961	8,795
VII. Cash and cash equivalents	41,978	66,013
	231,730	235,427
	501,044	507,488

CONS. BALANCE SHEET 30.06.2025 VS 31.12.2024

EQUITY & LIABILITIES

in EUR k	30.06.2025	31.12.2024
A. Shareholders' equity		
I. Share capital	22,330	22,330
II. Capital reserves	37,563	37,563
III. Treasury stock	-1,855	-1,855
IV. Retained earnings	159,603	158,347
V. Other reserves	-9,786	-6,519
	207,854	209,867
VI. Non-controlling interests	1,988	1,875
	209,842	211,742
B. Non-current liabilities		
I. Non-current, interest-bearing liabilities	78,506	91,265
II. Provision for deferred taxes	953	952
III. Provisions for employees	21,457	21,554
	100,916	113,771
C. Current liabilities		
I. Current interest-bearing liabilities	54,194	55,351
II. Liabilities on income taxes	770	517
III. Advance payments received on orders	182	179
IV. Trade accounts payable	63,591	63,389
V. Contract liabilities from contracts with customers	40	1,669
VI. Other current liabilities	55,994	48,335
VII. Current provisions	15,516	12,536
	190,286	181,975
	501,044	507,488

CONS. CASH FLOW STATEMENT H1 2025 VS H1 2024 –

PART 1

in EUR k	01.01. - 30.06.	
	2025	2024
Earnings before tax	1,492	-2,355
+ Depreciation on non-current assets	15,493	15,672
- Non-cash income from deconsolidation	0	723
-(+) Interest result	4,124	5,822
+(-) Other non-cash expenses and income	-3,307	1,933
+(-) Increase (decrease) in non-current provisions for employees	-219	78
-(+) Profit (loss) from fixed asset disposals	-70	-753
-(+) Increase (decrease) in inventories	-2,303	-495
-(+) Increase (decrease) in trade and other receivables and contract assets	-20,496	-18,855
+(-) Increase (decrease) in trade accounts payables, other liabilities and contract liabilities	7,497	7,182
+(-) Increase (decrease) in current provisions	3,027	6,616
= Consolidated cash flow from current activities	5,237	15,569
- Taxes paid	-469	-536
= Consolidated cash flow from operating activities	4,768	15,033
- Investments in fixed assets	-10,616	-12,002
+ Disposal of subsidiaries less discontinued cash and cash equivalents	0	19,643
+ Inflows from the disposal of intangible and tangible assets	385	6,669
+ Interest received	44	303
= Consolidated cash flow from investing activities	-10,187	14,613

CONS. CASH FLOW STATEMENT H1 2025 VS H1 2024 –

PART 2

in EUR k	01.01. - 30.06.	
	2025	2024
+ Inflows from loan financing	2,532	0
- Repayments of loan financing	-5,406	-44,069
+ Inflows from acquisition financing	0	25,000
- Repayments of acquisition financing	-7,500	0
- Repayments of real estate loan borrowings	-539	-958
- Outflows from lease agreements	-5,346	-3,277
-(+) Change in current financial liabilities (current accounts)	-4	-2,233
- Interest paid	-2,144	-6,744
- Dividends	0	-392
= Consolidated cash flow from financing activities	-18,407	-32,673
+(-) Consolidated cash flow from operating activities	4,768	15,033
+(-) Consolidated cash flow from investing activities	-10,187	14,613
+(-) Consolidated cash flow from financing activities	-18,407	-32,673
= Change in cash and cash equivalents	-23,826	-3,027
+(-) Effect from currency translations	-209	7
+ Opening balance of cash and cash equivalents	66,013	49,610
= Closing balance of cash and cash equivalents	41,978	46,589

POLYTEC SHARE KEY FIGURES

30.06.2025 VS PREVIOUS YEARS

POLYTEC Share (AT0000A00XX9)	Unit	H1 2025	H1 2024	Change	H1 2023	H1 2022
Closing price last trading day of period	EUR	3.28	3.34	-1.8%	4.72	6.00
Highest closing price during period (on 30.05.2025)	EUR	3.60	3.82	-5.8%	5.28	8.30
Average closing price during period	EUR	2.78	3.51	-20.8%	4.84	6.83
Lowest closing price during period (on 02.01.2025)	EUR	2.14	3.25	-34.2%	4.45	5.60
Market capitalisation last trading day of period	EUR m	73.2	74.6	-1.8%	105.4	134.0
Vienna Stock Exchange money turnover (double counting)	EUR m	13.7	13.5	1.5%	20.6	63.7
Vienna Stock Exchange share turnover (double counting)	Shares m	4.9	3.9	25.6%	4.2	9.0
Share turnover (daily average, double counting)	Shares	39,371	31,082	26.7%	33,396	71,340


Source: Vienna Stock Exchange

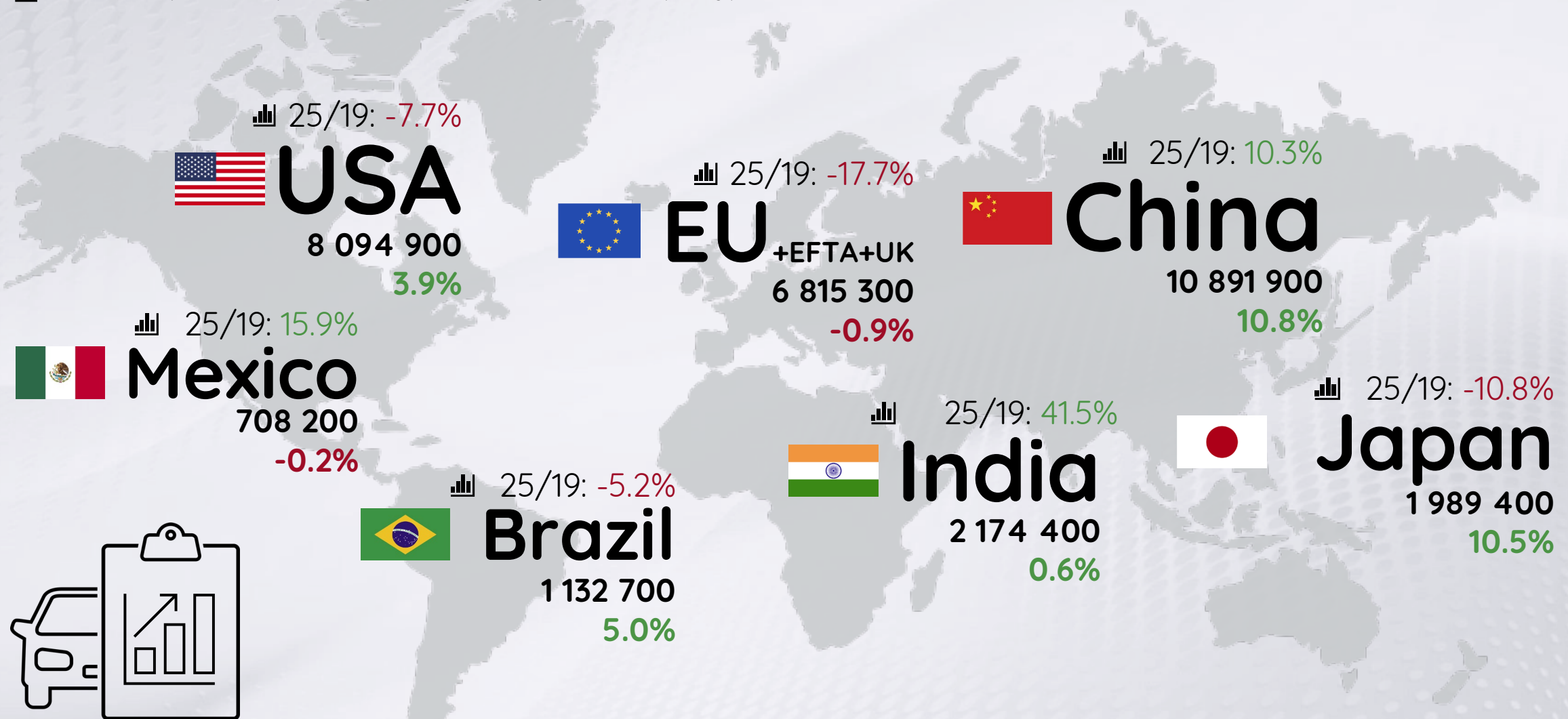
A hand is shown interacting with a large, futuristic infotainment screen inside a car. The screen displays a green-themed interface with icons for solar panels, wind turbines, a leaf, a gear, and a lightning bolt. The background of the image shows a blurred view of a road and distant mountains, suggesting motion.

AUTOMOTIVE MARKET

JAN – JUN 2025


NEW PASSENGER CAR REGISTRATIONS, MAJOR MARKETS – YTD JUNE 2025

 Full Year Comparison with pre-crisis year 2019, figures beyond current reporting period based on estimates




Source: VDA, S&P | Compared to the same period of the previous year


NEW PASSENGER CAR PRODUCTION, MAJOR MARKETS – FY FORECAST 2025

 Full Year Comparison with pre-crisis year 2019, figures beyond current reporting period based on estimates

 25/19: -9.0%
North America
14 850 000
-3.9%



 25/19: -20.7%
EU +EFTA+UK
15 220 000
-3.0%

 25/19: 26.8%
**China**
30 970 000
3.9%

 25/19: -3.1%
South America
3 170 000
7.1%

 25/19: 41.4%
**India**
5 940 000
5.0%

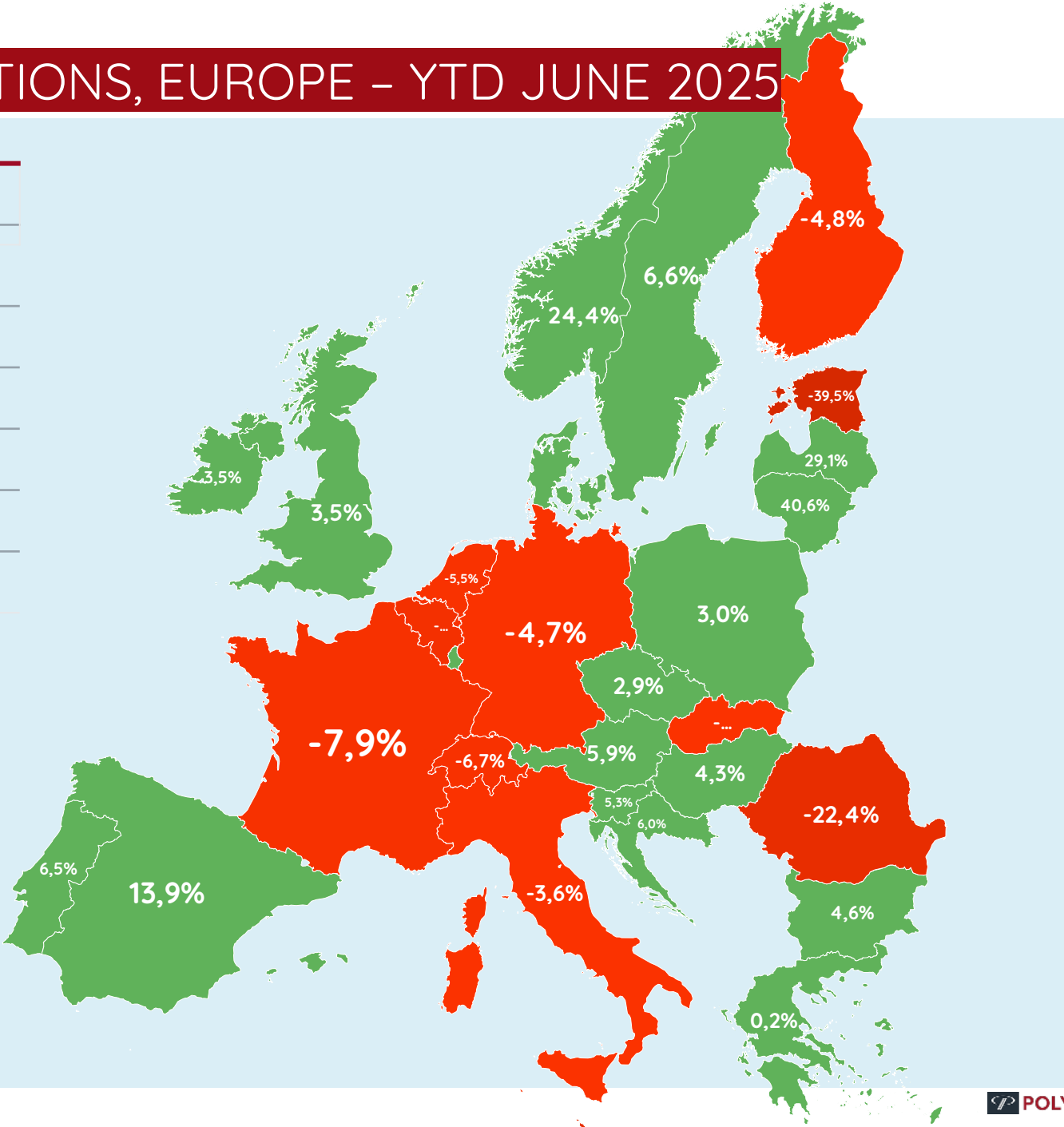
 25/19: -14.2%
**Japan**
7 900 000
0.1%

Source: S&P | Compared to the previous full year

NEW PASSENGER CAR REGISTRATIONS, EUROPE – YTD JUNE 2025

„BIG 5“	YTD	YOY %
Germany	1 402 789	-4.7%
UK	1 042 219	3.5%
France	842 204	-7.9%
Italy	855 028	-3.6%
Spain	609 801	13.9%
EU + EFTA + UK	6 815 320	-0.9%

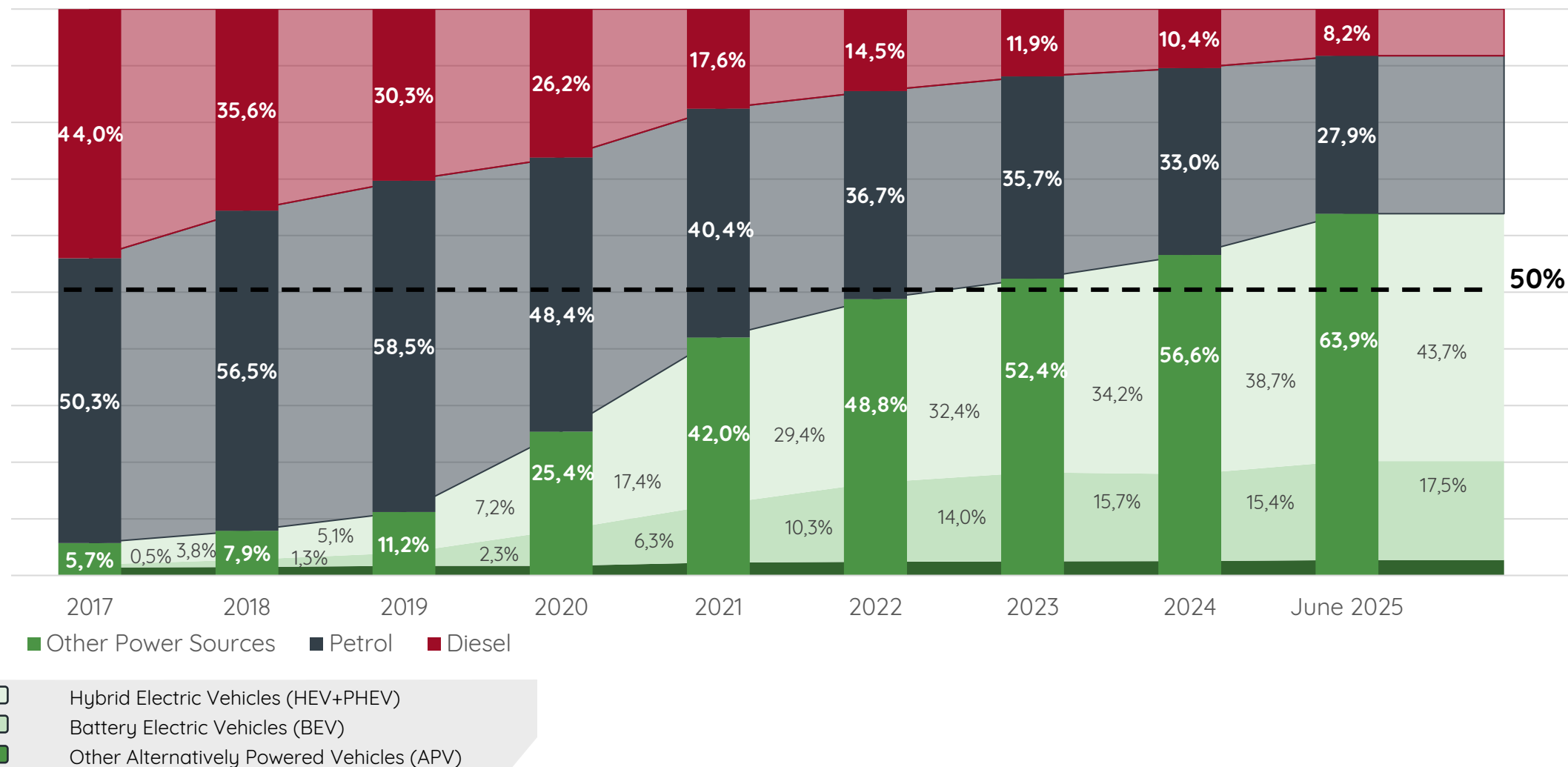
June 2025 (YoY June 2024)	
Germany	-13.8%
UK	6.7%
France	-6.7%
Italy	-17.4%
Spain	15.2%
EU + EFTA + UK	-5.1%



Source: ACEA | Compared to the same period/month of the previous year

NEW PASSENGER CAR REGISTRATIONS, EU+EFTA+UK – BY POWER SOURCE

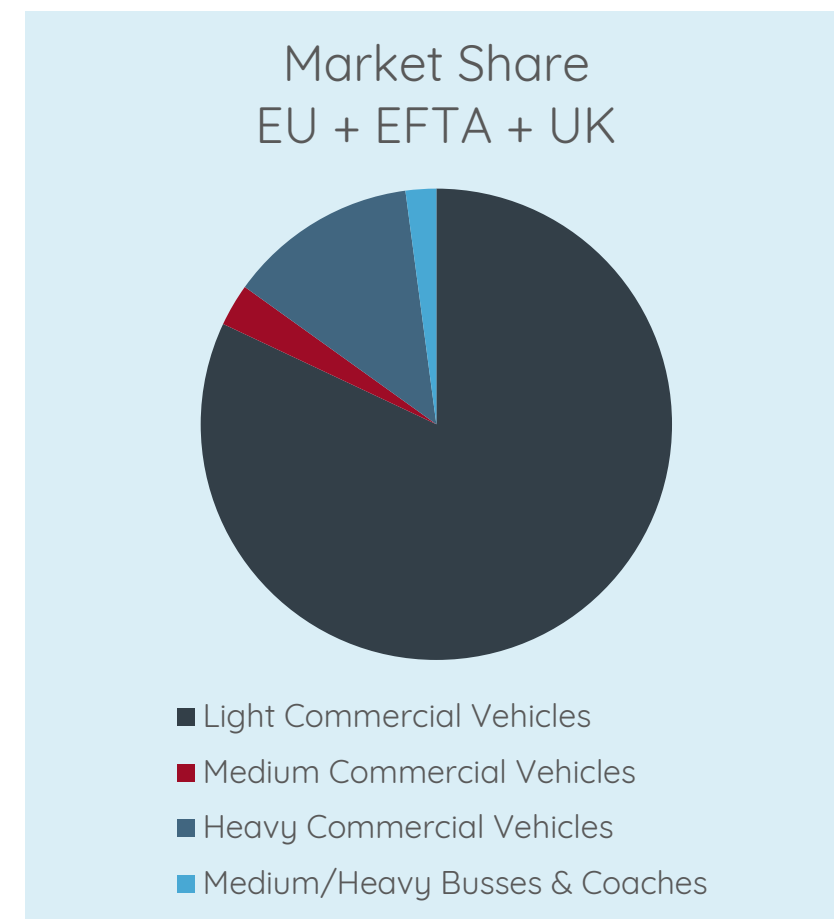
2017 – JUNE 2025



*Slight blurring in the separation of BEV and hybrid due to repeated changes in the systematics on the part of ACEA.

NEW COMMERCIAL VEHICLES REGISTRATIONS, EUROPE – Q1 - 2025

	Light Commercial Vehicles ≤3.5 t	Medium Commercial Vehicles >3.5 t to <16 t	Heavy Commercial Vehicles ≥16 t	Medium and Heavy Buses and Coaches >3.5 t	EU + EFTA + UK
Units	449 566	15 692	71 528	11 658	548 444
Change	-12.1%	-11.0%	-16.0%	5.7%	-12.3%
Market Share	82.0%	2.9%	13.0%	2.1%	100%



Source: ACEA | Compared to the same period of the previous year

POLYTEC AT A GLANCE



~3,700
EMPLOYEES



678 MIO
SALES
REVENUES



>38 YEARS
OF EXPERIENCE



Technology-independent
developer and manufacturer of
high-quality plastic solutions

Automotive and
non-automotive industry

TECHNOLOGICAL DIVERSITY AND PRODUCTION EXPERTISE



THERMOPLASTICS



Multi-component injection moulding
Assembly injection moulding
WIT (water injection technology)
GIT (gas injection technology)
PIT (projectile injection technology)
In-Mould-Decoration
Injection-Moulding-Compounding
High-gloss technology

Up to 4000 tons clamping force



COMPOSITES



Production of glass fibre SMC
Production of carbon fibre SMC
SMC/LFT/GMT compression moulding
UD-Tape application
Hybrid compression moulding (LWRT-LFT)
Wet pressing
In-Mould-Coating

Up to 4300 tons clamping force



POLYURETHANE



PUR RRIM / RRIM lightweight
PUR rigid / semi-rigid
Blow moulding

Up to 630 tons clamping force



PRE- & POST-PROCESSING



Toolmaking
Trimming & cutting (water jet, laser, milling)
Joining technologies (ultrasonic, hot gas, etc)
Testing & validation
Class A painting
Metal & stainless-steel processing
Assembly

Just-in-sequence delivery

LOCATIONS

19x in Europe

1x in Asia

1x in America

1x in Africa



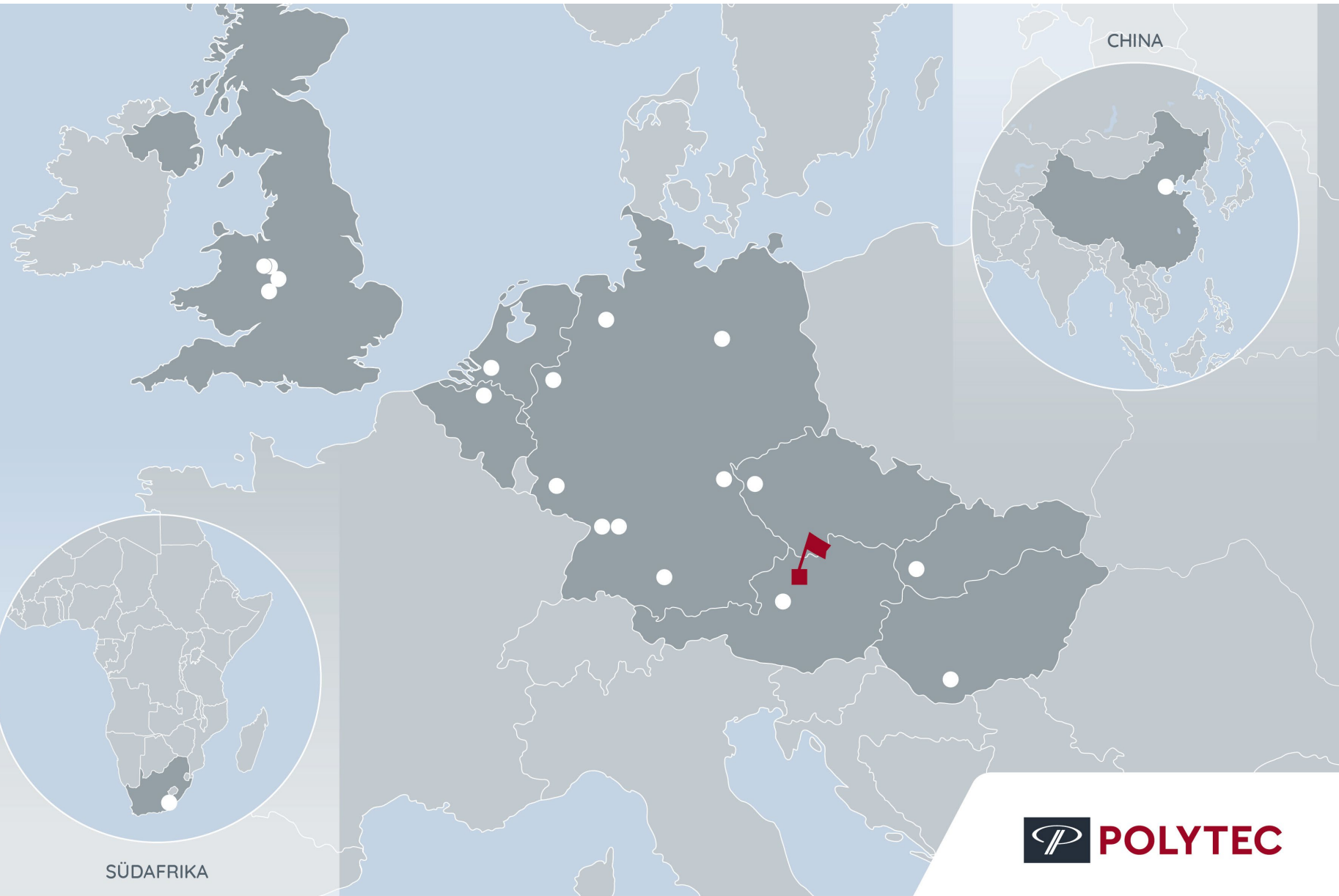
USA



SÜDAFRIKA



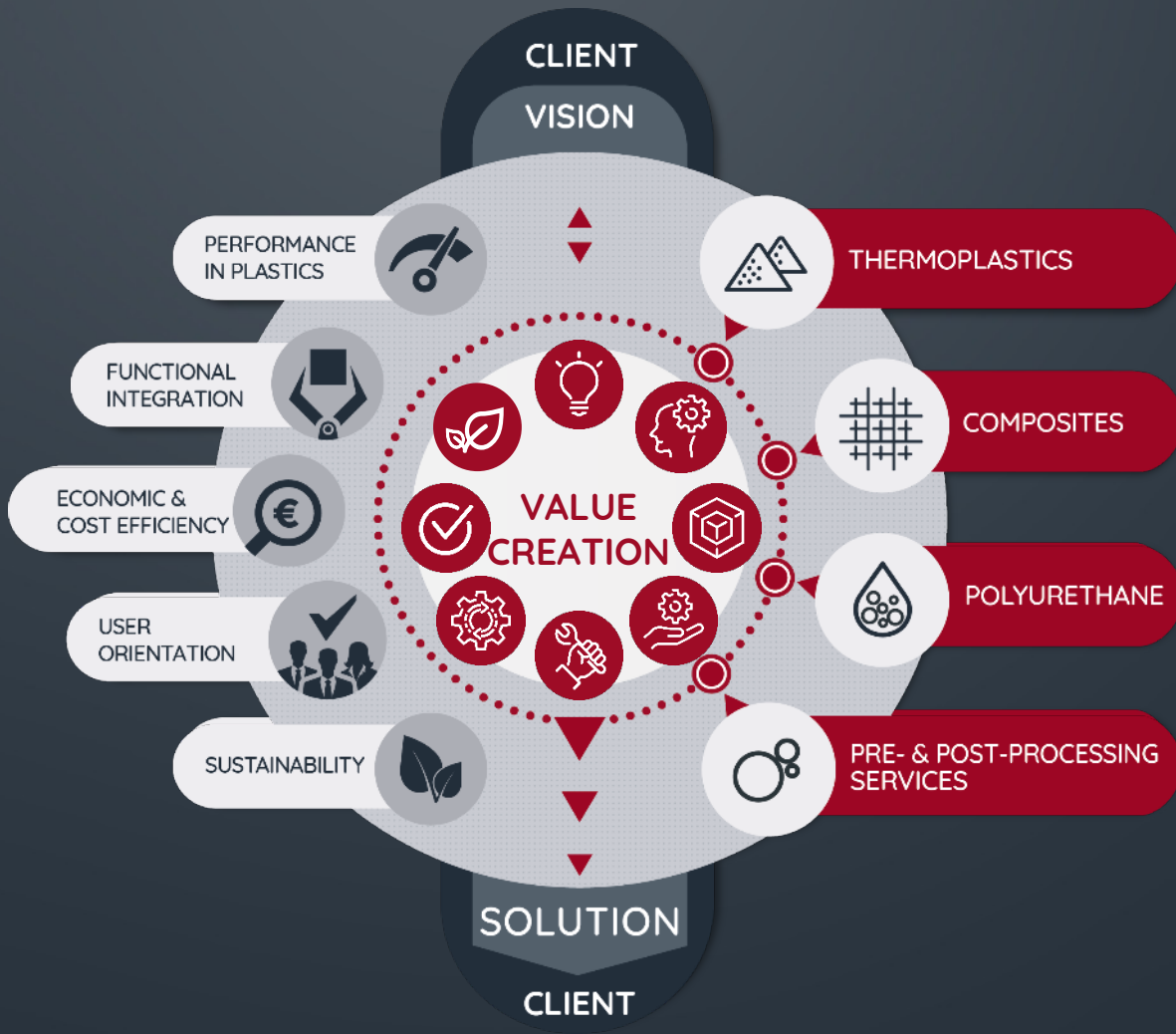
CHINA












 **POLYTEC**



WE CREATE ADDED VALUE FOR OUR CUSTOMERS



-  Design & technical concept
-  Development of material
-  Simulation
-  Construction & prototyping
-  Tooling
-  Testing & validation
-  Industrialising
-  Quality assurance
-  Life cycle assessment

IR CONTACT:

POLYTEC Holding AG

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CFO Markus Mühlböck (left) manages the IR agendas jointly with Investor Relations Manager **Paul Rettenbacher** (right).

PASSION CREATES INNOVATION

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