

Q3 2026 REVENUE



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Automotive market remains under pressure in Q3 2026



Global automotive production* in Q3 2026

22.0 m

vehicles

-1.9%

vs. Q3 2025



REGION	Q3 26 % of global automotive production	CHANGE vs. Q3 2025
China	36%	-5.6%
Rest of Asia	26%	+5.3%
Europe	17%	-0.2%
North America	16%	-5.0%

Regional trends



North America

Decreasing market

Softer demand with solid inventory levels in the US, and tariffs uncertainty continue to impact production



China

Domestic market declining

Persistent pressure from intense competition and weak demand, with automotive sales down -24%** , partially offset by higher exports



Europe

Continued production adjustments

Weaker demand drives production adjustments, particularly in Western Europe



Rest of Asia

Solid automotive production

Continuous strong growth momentum in India

Raw materials and components cost inflation,
and supply chain disruptions

Q3 2026 highlights

+2.8% Like-for-Like revenue growth

In a decreasing market

All segments are growing

US, Eastern Europe, South Korea and India are the main drivers

Strategic milestone in Lighting

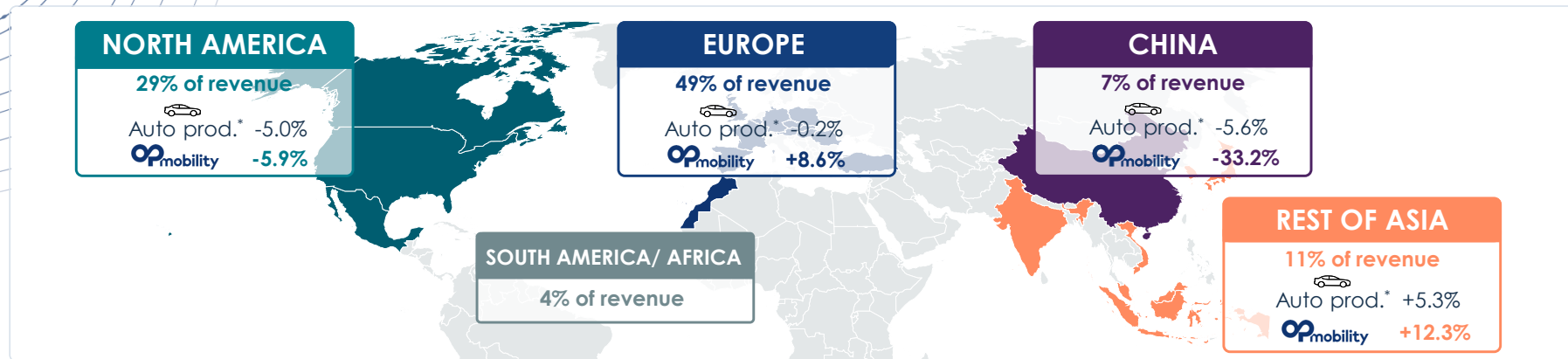
Agreement recently signed with Hyundai Mobis, with closing targeted in the second half of 2027

Fourth plant inaugurated in Morocco

To support increasing volume for Exterior



Our resilient performance in a regionally mixed market



North America

- **USA** remains the **top contributor** in Group's revenue
- **US revenue +4.9%**, strongly outperforming the market
- **Modules** activity supported by **higher volumes for a US OEM**
- **Lighting** benefiting from several **Mexico launches**

Europe

- **Eastern Europe** growth driven by **modules assembly** and **exterior systems**
- Announcements of volume cuts from European OEMs due to **weak demand**
- **Reinforcing competitiveness**

China

- **Exterior parts sales evolved broadly in line with the market**, while development revenues pace correlated to OEMs launches
- **Fuel tanks** volumes impacted by **powertrain electrification**
- **Strengthening partnerships** with **strategic local players** in and outside China

Rest of Asia

- **South Korea** led by **strong momentum** in **Modules** and **Fuel Systems**
- **Strong outperformance** in **India**, confirming a strong market position
- **New C-Power plant opening** by end 2026 in India

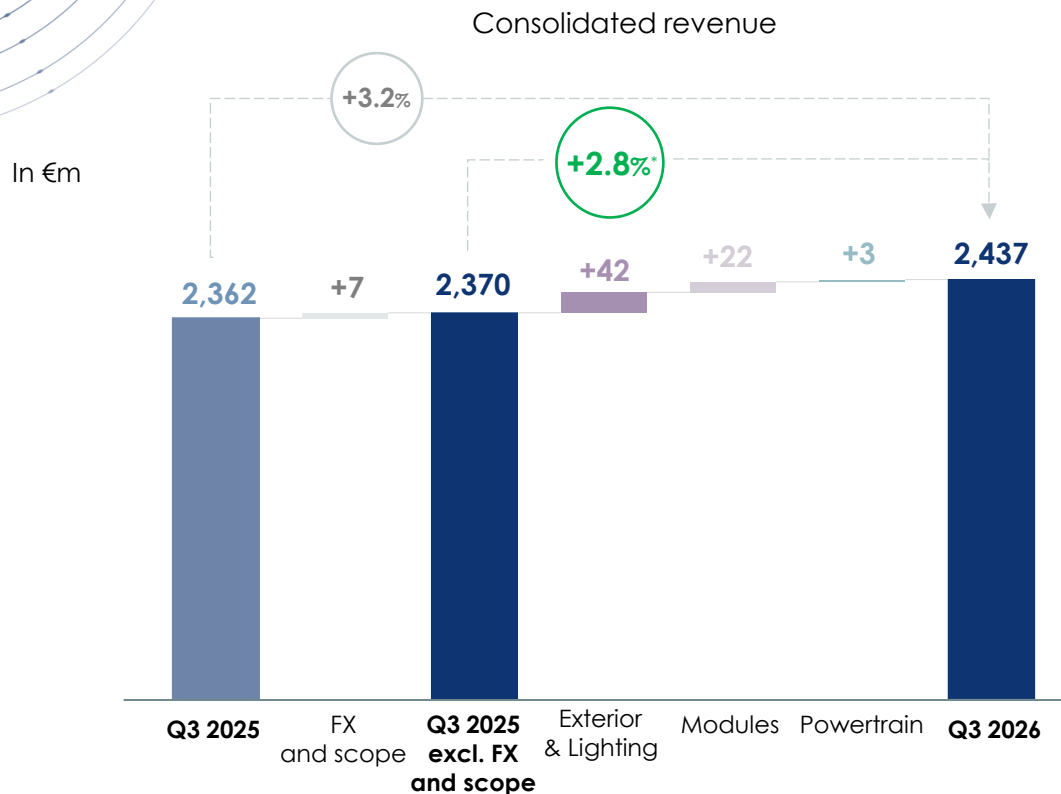


Q3 2026 Revenue

Stéphanie LAVAL, VP Strategic Planning & Investor Relations



Solid revenue growth LFL in Q3 2026



- **All segments** posted **revenue growth** vs. Q3 2025
- **Positive FX impact**, mainly linked to US dollar
- **No material scope impact** from the expansion of YFPO scope since 1st June 2026
- **Joint ventures revenue** reflecting decreasing production in China, partially offset by the growing activity in South Korea

Exterior solutions – Q3 2026 highlights



Exterior & Lighting

Exterior benefited from **several launches in USA** and **strong volumes in Eastern Europe**



Launch
BMW – X5
Bumpers



Launch
Volkswagen – Atlas
Bumpers



Launch
Skoda – Peaq
Bumpers

Continuous improvement in Lighting revenue, with several launches notably in Czech Republic



Launch
Skoda – Peaq
Headlamps, rear lamps



Launch
Renault – Megane
Rear lamps



Modules

Solid performance in **the US**, mainly driven by higher volumes for **a major US OEM**

Increasing activity in **Europe**, notably thanks to **major launches**



Launch
Skoda – Peaq
Front end modules

Continuous momentum in **Asia**



Launch
Jaeo – J5
Front end modules

Powertrain solutions – Q3 2026 highlights



Fuel systems & battery packs

High fuel systems volumes in the Americas



Award
Jeep – Grand Cherokee



Award
Volvo – XC90



Launch
Polaris – General

Strong fuel tank production in Asia, notably in India, and new award in battery packs for passenger cars



Award
Suzuki – Ertiga



Launch
Major Chinese OEM



Launch
Kia – Sorento



Award
Suzuki – Various vehicles
Battery packs

Solid fuel tank activity in Europe



Launch
Toyota – Hilux



Strategic Highlights

Félicie BURELLE, Chief Executive Officer

Strengthening our industrial capacities in Morocco



OPmobility in Morocco

Presence since **2013**

Three existing plants

Kenitra



Exterior
1 plant

+

Tangier



Lighting
1 plant



Fuel tanks
1 plant



STELLANTIS



Tangier

Kenitra



Inauguration of a new plant in Kenitra

Fourth plant in the country

A new plant for Exterior

Kenitra



Exterior
2 plants

+

Tangier



Lighting
1 plant



Fuel tanks
1 plant



To support higher demand from a major OEM in a growing Moroccan market* (+8% in 9M 2026)

Driving long-term value with Hyundai Mobis' lighting business



Key figures

- Enterprise value: KRW600bn*
- 2025 revenue: KRW2.5 trillion**
- Positive operating margin in 2025



Transaction perimeter

- Acquisition of 100% of Hyundai Mobis' lighting activity
- Including industrial, commercial and engineering capabilities



Financing

- No material impact on OPmobility deleveraging strategy



Agenda

- Subject to customary antitrust and regulatory approvals
- Closing expected in H2 2027



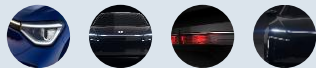
Accelerating our diversification strategy

Current Lighting business



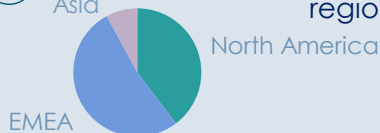
Technology

Rear lamps
focused
technology



Geography

Concentrated
regional mix



Main customers

Limited exposure to key Asian OEMs



Industrial footprint

9 plants



A Stronger Global Lighting Player combined with Hyundai Mobis



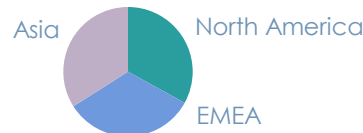
Fortifying our technological leadership

Broader product
and technology portfolio



Rebalancing our geographical mix*

More balanced
regional mix



Diversifying our customer portfolio

Western OEMs



Major Group customers



Expanding our presence in Asia

9 existing plants + 5 additional plants

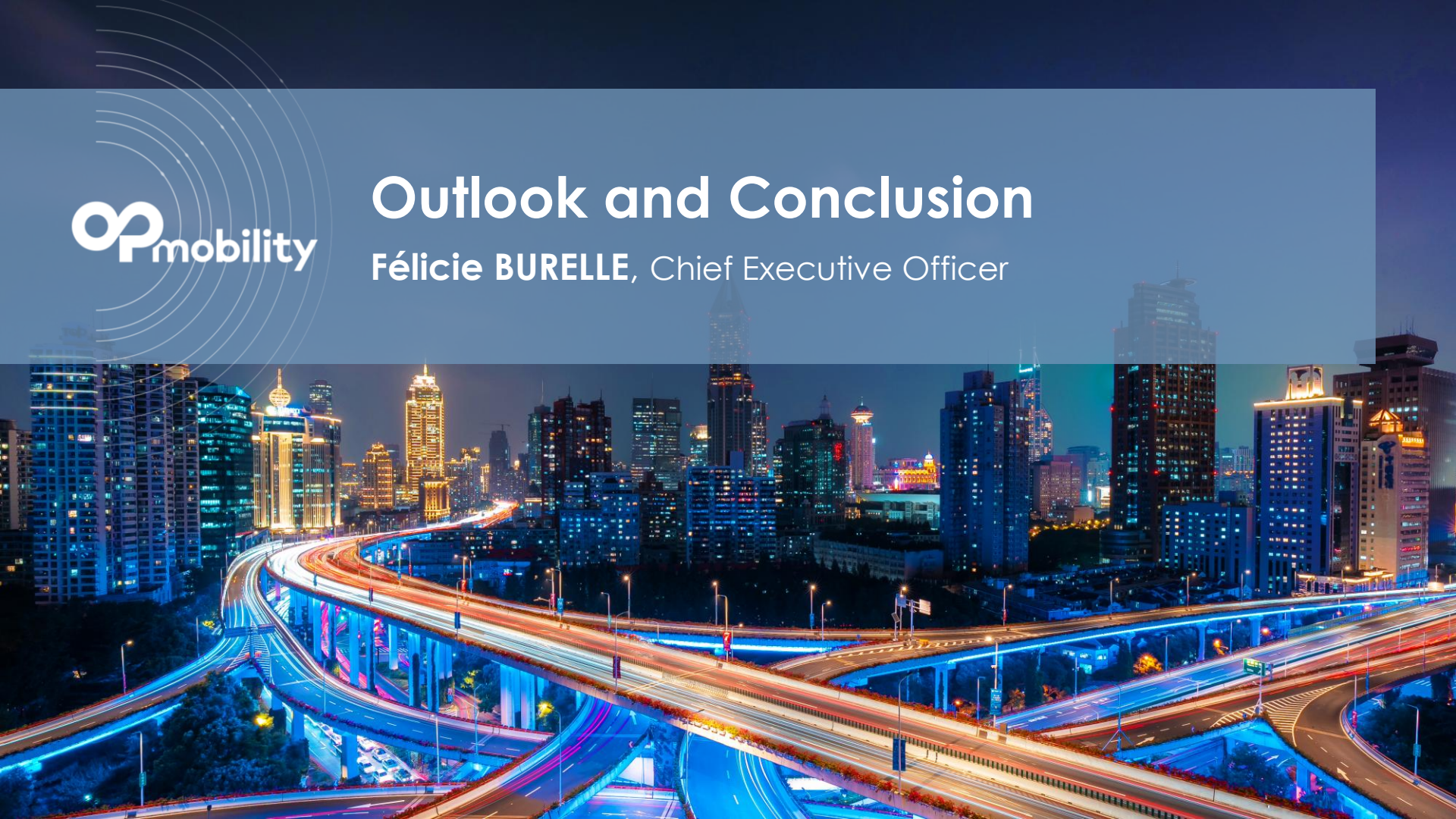


14 plants



Outlook and Conclusion

Félicie BURELLE, Chief Executive Officer



Addressing the transformation of the automotive market through targeted actions in Europe



Adapting industrial footprint in Germany

- ✓ Market with overcapacity
- ✓ Production transfer from an exterior plant to other sites
- ✓ Enhanced asset utilization



Optimizing R&D organization in France

- ✓ Lower development activity in Powertrain
- ✓ 2035 regulation on combustion engine vehicles and delays in the hydrogen mobility market



Restructuring costs

- ✓ Adaptation and competitiveness initiatives
- ✓ Between €120 million and €130 million for the full-year 2026



Reinforcing our operational competitiveness and creating value over the medium term

More pronounced deterioration of the market conditions

- Persistent volatility in the prices of raw materials and certain components
- Automotive production revised downwards, particularly in China
- Announcements of volume cuts from some customers

Full-year objectives aligned with market conditions

- Operating margin €430m – €450m
- Net result Group share Significant
- Free Cash Flow > €220m
- Net debt < Net debt end 2025



While maintaining strict financial discipline and selective allocation of resources

Questions & Answers



Appendix: glossary

- **Group segment reporting** breaks down as follows:
 - Exterior & Lighting, which includes exterior systems and lighting activities;
 - Modules, which comprises module design, development and assembly activities;
 - Powertrain, which brings together the C-Power (energy and emission reduction systems, and batteries and electrification systems) and H₂-Power (hydrogen activity) business groups.
- **Economic revenue** corresponds to consolidated revenue of the Group and the following joint ventures and associates consolidated at their percentage holding: BPO (50%) and YFPO (50%) for Exterior & Lighting, EKPO (40%) for Powertrain and SHB (50%) for Modules.
- **Consolidated revenue** does not include the Group's share of revenue from joint ventures, consolidated using the equity method, in accordance with IFRS 10-11-12.
- **Like-for-Like (LFL)**: at constant scope and exchange rates. The currency effect is calculated by applying the exchange rate of the current period to the revenue of the previous period.
- **Operating margin** includes the Group's share of income from companies consolidated using the equity method and amortization of intangible assets acquired, before other operating income and expense.
- **Free cash flow** corresponds to operating cash flow less expenditure on property, plant and equipment and intangible assets net of disposals, taxes and net interest paid, plus or minus the change in the working capital requirement (cash surplus from operating activities).
- **Net debt** includes all long-term borrowings, short-term loans, and bank overdrafts less loans, marketable debt instruments and other non-current financial assets, and cash and cash equivalents.
- **Global or regional automotive production data** refer to Mobility Global forecasts published in October 2026 (<3.5-ton passenger car segment and commercial light vehicles).

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