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Q4 and FY 2025 Schaeffler AG Pre-Close Call

January 29, 2026
Herzogenaurach

We pioneer motion

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Key aspects Q4 2025 and FY 2025

Schaeffler Group

	Q4 2024[3]	FY 2024[3]	Q3 2025	9M 2025	Key aspects
Sales in EUR bn	5,944	24,313	5,826	17,672	Q4: flattish quarter-over-quarter FY: lower than PY; within FY guidance range of EUR 23 to 25 bn
EBIT margin[1]	1.8%	3.5%	4.5%	4.2%	Q4: clearly higher than Q4 2024, but lower quarter-over-quarter FY: around the midpoint of the FY guidance of 3% to 5%
Free Cash Flow[2] in EUR mn	266	-694	175	47	Q4: another strong quarter FY: significant step-up vs. last year; around the upper end of the guidance range of EUR 0 to 200 mn

[1] Before special items | [2] Before cash in- and outflows for M&A activities | [3] Pro forma figures 2024

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Divisional aspects Q4 and FY 2025

E-Mobility

Market environment remains challenging especially in Americas

Sales

- Q4: slight growth year-over-year driven by ramp-ups
- FY: at lower end of FY guidance

EBIT margin[1]

- Q4: further improved year-over-year
- FY: comfortably reaching FY guidance range

Powertrain & Chassis

Overall soft market; in particular in Europe

Sales

- Q4: moderate decline year-over-year
- FY: strong decrease driven by phase-out businesses; around the low end of the guidance

EBIT margin[1]

- Q4: clearly lower than previous year due to lower volumes
- FY: within lower half of FY guidance range

Vehicle Lifetime Solutions

Robust demand in all regions

Sales

- Q4: mid single-digit growth year-over-year
- FY: mid single-digit growth year-over-year, at lower guidance band

EBIT margin[1]

- Q4: slightly up year-over-year
- FY: around midpoint of FY guidance range

Bearings & Industrial Solutions

No significant market recovery; flattish compared to PY

Sales

- Q4: slight decrease year-over-year
- FY: slightly lower than PY; well within guidance corridor

EBIT margin[1]

- Q4: clearly higher year-over-year
- FY: continuously improved margin profile; safely within adjusted FY guidance range

[1] Before special items

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FY 2025 Guidance

	Schaeffler Group	E-Mobility	Powertrain & Chassis	Vehicle Lifetime Solutions	Bearings & Industrial Solutions
Sales in EUR bn	23.0 to 25.0	5.0 to 5.5	9.0 to 9.5	3.0 to 3.25	6.0 to 6.75
EBIT margin[1]	3% to 5%	-17% to -14%	10% to 12%	14% to 16%	6% to 8%
Free Cash Flow[2] in EUR mn	0 to 200				

[1] Before special items | [2] Before cash in- and outflows for M&A activities

Mid-Term Targets 2028

	Group	E-Mobility	Powertrain & Chassis	Vehicle Lifetime Solutions	Bearings & Industrial Solutions
Sales	**EUR 27 to 29 bn** 2024: EUR 24.3 bn	**EUR 8.25 to 9 bn** 2024: EUR 4.8 bn	**EUR 8 to 8.75 bn** 2024: EUR 9.7 bn	**EUR 3.75 to 4.25 bn** 2024: EUR 3.0 bn	**EUR 6.75 to 7.25 bn** 2024: EUR 6.5 bn
EBIT[1] margin	**6% to 8%** 2024: 3.5%	**> 0%** 2024: -22.1%	**10% to 12%** 2024: 11.4%	**13.5% to 15.5%** 2024: 14.8%	**9% to 11%** 2024: 6.7%

Free Cash Flow[2]
EUR 400 to 600 mn
2024: EUR -694 mn

Reinvestment Rate[3]
~1.0x
2024: 1.1x

Leverage Ratio[4]
1.5x to 2.0x
H1 2025: 2.4x

Dividend Payout[5]
40% to 60%

Group Target | Group Additional Parameters | Divisional Target

[1] Before special items | [2] Before cash in- and outflows for M&A activities | [3] Investments/D&A (excl. depreciation for leasing) | [4] Net financial debt to EBITDA LTM ratio before special items | [5] In % of Net Income before special items, attributable to shareholders of the parent company

Q&A

Thank you

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Financial calendar 2026

March 3
Annual Press and Analyst Conference 2025

March 4
Analyst Breakfast London

March 4
Citi London Roadshow

April 23
Annual General Meeting 2026

May 5
Q1 2026 Earnings Release

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Key figures by division 2025

Group in EUR mn	Q1 25	Q2 25	Q3 25	9M 25
Sales	5,924	5,922	5,826	17,672
Sales growth[1]	*-2.9%*	*-2.2%*	*+1.3%*	*-1.3%*
EBIT[2]	276	205	264	746
EBIT margin[2]	4.7%	3.5%	4.5%	4.2%

VLS in EUR mn	Q1 25	Q2 25	Q3 25	9M 25
Sales	783	780	740	2,303
Sales growth[1]	*+10.7%*	*+2.3%*	*+2.3%*	*+5.0%*
EBIT[2]	123	112	113	348
EBIT margin[2]	15.7%	14.4%	15.3%	15.1%

E-Mob in EUR mn	Q1 25	Q2 25	Q3 25	9M 25
Sales	1,174	1,245	1,286	3,705
Sales growth[1]	*+9.6%*	*+9.7%*	*+4.7%*	*+7.9%*
EBIT[2]	-268	-192	-189	-650
EBIT margin[2]	-22.9%	-15.5%	-14.7%	-17.5%

B&IS In EUR mn	Q1 25	Q2 25	Q3 25	9M 25
Sales	1,627	1,614	1,570	4,811
Sales growth[1]	*-2.1%*	*-0.5%*	*+2.2%*	*-0.2%*
EBIT[2]	164	93	125	382
EBIT margin[2]	10.1%	5.8%	7.9%	7.9%

PTC in EUR mn	Q1 25	Q2 25	Q3 25	9M 25
Sales	2,302	2,245	2,194	6,741
Sales growth[1]	*-10.7%*	*-7.3%*	*-0.4%*	*-6.4%*
EBIT[2]	286	223	242	751
EBIT margin[2]	12.4%	9.9%	11.0%	11.1%

Others in EUR mn	Q1 25	Q2 25	Q3 25	9M 25
Sales	38	37	37	112
Sales growth[1]	*-55.3%*	*-67.7%*	*-43.4%*	*-57.8%*
EBIT[2]	-28	-31	-26	-85
EBIT margin[2]	-74.3%	-83.8%	-71.9%	-76.7%

[1] FX-adjusted | [2] Before special items

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Pro Forma 2024 figures by division

Group in EUR mn	Q1 24	Q2 24	Q3 24	Q4 24	FY 24
Sales	6,141	6,280	5,947	5,944	**24,313**
EBIT[1]	287	244	206	105	**842**
EBIT margin[1]	4.7%	3.9%	3.5%	1.8%	**3.5%**

VLS in EUR mn	Q1 24	Q2 24	Q3 24	Q4 24	FY 24
Sales	717	788	741	715	**2,961**
EBIT[1]	114	129	104	93	**440**
EBIT margin[1]	15.8%	16.4%	14.0%	13.0%	**14.8%**

E-Mob in EUR mn	Q1 24	Q2 24	Q3 24	Q4 24	FY 24
Sales	1,089	1,179	1,266	1,283	**4,816**
EBIT[1]	-324	-260	-214	-268	**-1,066**
EBIT margin[1]	-29.8%	-22.0%	-16.9%	-20.9%	**-22.1%**

B&IS In EUR mn	Q1 24	Q2 24	Q3 24	Q4 24	FY 24
Sales	1,662	1,679	1,599	1,585	**6,525**
EBIT[1]	190	74	104	68	**435**
EBIT margin[1]	11.4%	4.4%	6.5%	4.3%	**6.7%**

PTC in EUR mn	Q1 24	Q2 24	Q3 24	Q4 24	FY 24
Sales	2,588	2,515	2,275	2,278	**9,656**
EBIT[1]	328	320	225	228	**1,101**
EBIT margin[1]	12.7%	12.7%	9.9%	10.0%	**11.4%**

Others in EUR mn	Q1 24	Q2 24	Q3 24	Q4 24	FY 24
Sales	86	118	67	84	**355**
EBIT[1]	-20	-19	-12	-16	**-67**
EBIT margin[1]	-23.6%	-16.1%	-17.6%	-18.8%	**-18.9%**

[1] Before special items