

# Full-Year Results Fiscal Year 2025

June 4, 2026, Winterthur, Switzerland

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# Agenda



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# Key Highlights and Market Developments

Fabrice Billard

CEO

# Sustained value creation in a disrupted market environment

## Financials (in mn CHF)

**Order intake** reflects  
market disruptions

FY 2025	<b>784.3</b>
FY 2024	<b>1'151.2</b>

**-31.9%**

**Sales** supported by  
delivery of order backlog

FY 2025	<b>1'057.1</b>
FY 2024	<b>1'095.6</b>

**-3.5%**

**EBIT margin**  
further improved

FY 2025	<b>13.3%</b>
FY 2024	<b>12.9%</b>

**+0.4pp**

**Net income**  
new record year

FY 2025	<b>110.1</b>
FY 2024	<b>105.6</b>

**+4.3%**

**RONOA**  
further enhanced

FY 2025	<b>40.4%</b>
FY 2024	<b>32.6%</b>

**+7.8pp**

**FY 2026  
guidance**

Sales ~CHF 900-1'000

EBIT margin ~12%

**Stronger H2  
expected**

**MRP guidance  
2027**

Sales ~CHF 1'200

EBIT margin 12-15%

**Delayed**

# Macroeconomic environment reflects twin impact of US tariffs and Middle East conflict

## Market environment

### Macro-economic backdrop

### Impact across divisions

## Overall impact

- Rising costs and supply chain disruptions impacting GDP growth
- Higher input costs (freight and logistics)
- Significant Swiss Franc appreciation vs relevant currencies in FY 2025:
  - 9.4% vs USD, 17.4% vs INR, 4.7% vs CNY
  - FX translation effects on sales mitigated at EBIT level due to equal effects on local costs

### Systems division

- Most regions and segments negatively affected by deferred investment decisions
- Petrochemical segment most affected, esp. in China, with tariff uncertainties for feedstock and petrochemical products
- Middle East projects across all segments not expected to recover before end FY 2026







### Services division

- Customers protecting cash and profit. Spare parts procurement/compressor upgrade projects paused
- Lower compressor utilization as security/logistics constraints halt operations
- Europe subdued due to high energy prices and tariff-related uncertainty in Petrochemical segment
- US market developing well, supported by energy demand and export

# Most markets negatively affected by global geopolitics and US tariffs

## FY 2025 market trends

### Trends across segments and regions

 <p>Petrochemical/ Chemical Industry</p>	 <p>Gas Transport &amp; Storage</p>	 <p>H<sub>2</sub> Mobility &amp; Energy</p>	 <p>Industrial Gas</p>	 <p>Refinery</p>	 <p>Gas Gathering &amp; Processing</p>
<p>China facing overcapacity &amp; tariff uncertainty for imports &amp; exports</p> <p>Deferred decisions on new EVA/LDPE plants in China &amp; Middle East projects, partially offset by increased activity in India</p>	<p>Pipeline lively for LNG tankers &amp; bunker vessels, albeit some decisions deferred. High vs low pressure uncertainty remains</p> <p>Continuous activity across LNG import terminals</p> <p>LPG tankers remain at good level, albeit lower vs record previous year</p>	<p>Decline in the USA following the phase-out of supportive government measures</p> <p>European regulations on green H<sub>2</sub>-based energy carriers and derivatives slow, but starting to gain momentum, esp. in Germany and Finland</p> <p>China maintaining positive momentum</p>	<p>Deferred project decisions globally</p> <p>No new polysilicon plant due to remaining overcapacity, mainly impacting China</p>	<p>SAF &amp; e-fuels gaining momentum</p> <p>Moderate investments in new conventional refineries and in capacity expansions</p>	<p>Biogas applications gaining traction</p> <p>Good development of traditional upstream applications in US, Middle East and Africa</p> <p>CCUS project pipeline further developing but at slow pace for API618 compressors</p>

# Resilient setup and order backlog provide a solid foundation

## Evolution of key indicators over the past 8 years

**FY 2018 to FY 2025 evolution**

**Broader portfolio:**

- Marine
- Hydrogen
- High-speed
- Diaphragm
- Digital services
- Etc.

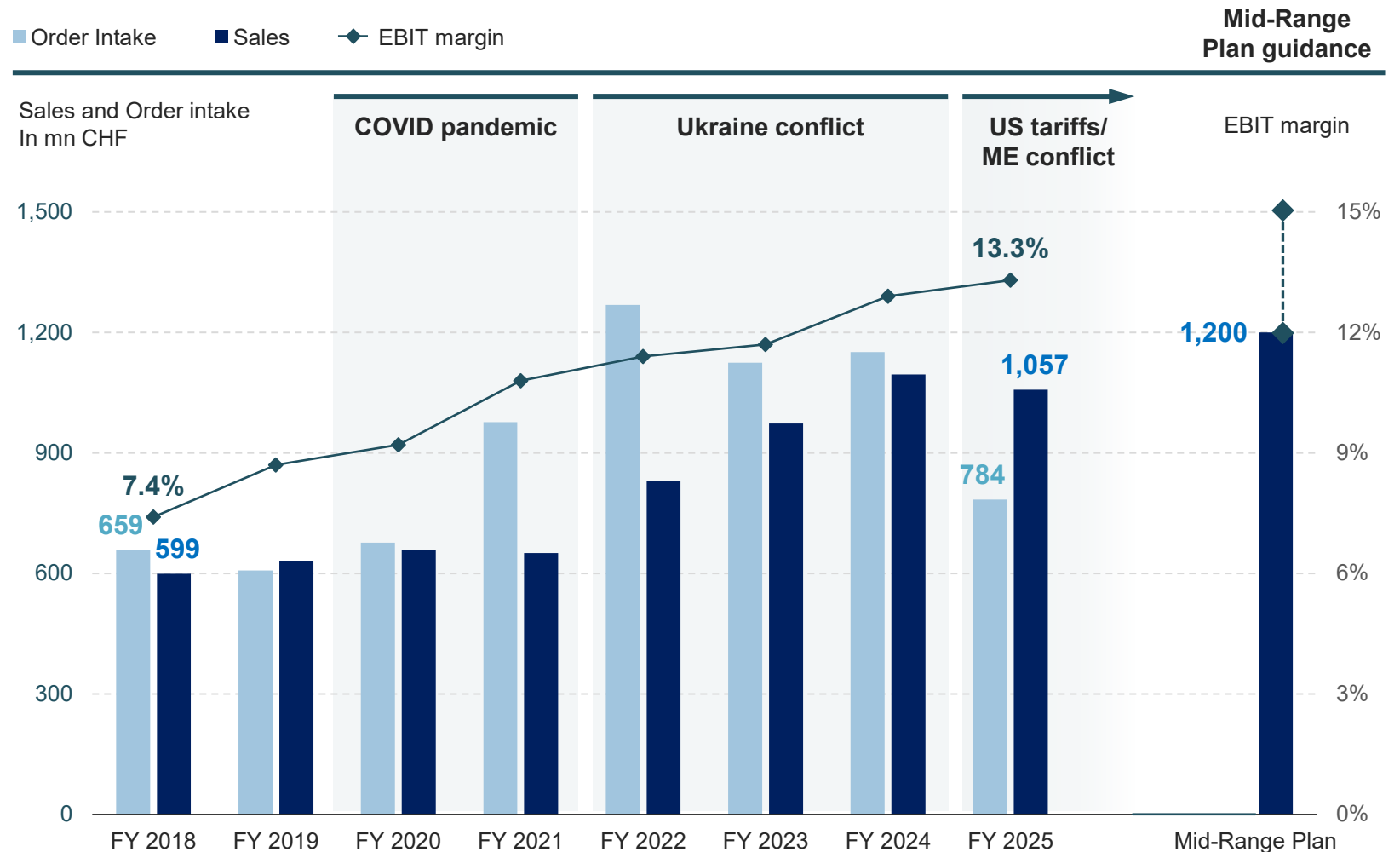
**Enhanced footprint & supply chain:**

- USA Service
- China
- India and others

**Sales CAGR:**

- 6.5% in CHF
- 8.5% in local currency

**EBIT CAGR: 13.7%**



# Mitigating actions implemented and underway to adapt to lower sales level

## Resilient set-up

- Sizeable order backlog
- Diverse end markets
- Hedge between “new” and “old” energies
- Resilient Service business with increasing installed base
- Regional supply chains
- Global footprint with local value-added

## Acceleration of MRP initiatives in FY 2024

- Operational excellence, e.g., Fit4Growth
- Value engineering
- Increase of local value-added
- Growth initiatives

## Additional measures implemented in FY 2025

- Targeted cost reduction measures in certain countries and functions
- Workload-based reduction of external & temporary workers
- Global restrictions for new hires
- Simplification of global functions in Systems Division
- Increase of EU outsourcing in Switzerland to save costs and reduce dependence on CHF

## Additional measures ongoing/planned in FY 2026

- New measures similar to FY 2025 to adapt to the lower Order Intake and ongoing market disruptions

# Driving efficiency gains with supply-chain and manufacturing optimization

## Fit4Growth program in Switzerland



### Strengthen supply chain



#### **Clear Make-or-Buy** with portfolio for in-house and outsourced technologies

- Increased competitiveness, with 5 to 20% savings for outsourced parts
- Reduced dependence on CHF cost base

#### **Disciplined dual-sourcing model**

- Increased supply chain resilience – Improved negotiation power

### Secure in-house core competences



#### **Critical technologies** to remain in-house

- Safeguarding know-how and innovation capabilities

#### **Several machines to be replaced to modernize park**

- Reducing downtime and machine lifecycle cost

### Improve K-Laby<sup>1</sup> assembly



#### **Improved flowline and automation**

- 30%+ expected reduction in lead time and labor costs
- 10% expected reduction in footprint
- Ability to ramp-up production capacity with demand

# Major order for next-generation LNG carriers with new compressor

## Reinforcing our position in the marine market



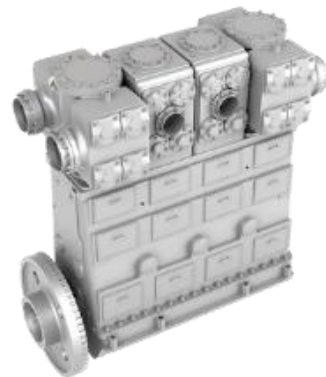
Assembly of a Laby®-GI compressor

### Largest ever Marine order

- Hanwha Ocean as customer
- 14 large compressors for boil-off gas and fuel-gas injection
- For seven next-generation 174'000 m<sup>3</sup> LNG carriers

### New compressor platform

- Designed for the latest LNG tank technologies, with lower boil-off rate
- Increased discharge pressure of 330 bar, for higher energy efficiency and lower emissions



x14

Next generation compressor 6LP165E for high-pressure ME-GI engines

Partnership with

**Everllence**

New compressor parameters defined in close partnership with Everllence to optimize overall high-pressure ME-GI propulsion technology

ME-GI delivers superior performance and significantly reduced environmental impact by virtually eliminating methane slip and reducing greenhouse gas emissions

# Nine new service locations to continue our expansion toward our key customers

## New Services locations in FY 2025



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### Improved downstream footprint in USA

- Relocated our Northeast workshop to Pottstown; closer to our key customers
- Acquired ACT, adding 2 locations in Batavia (IL) and in Pasadena (TX)

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### Expanded in our white spots

- New Service Center in Ho Chi Minh City (Vietnam, via local partnership), Sarnia (Canada), Bahia (Brazil), and Hiroshima (Japan, via local partnership)
- New local agent in Walvis Bay (Namibia)

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### Building spare part manufacturing center in India

- Initiated the construction of a new global factory in Vadodara
- Focus on valves, rings, and packings

# Elevating data analysis, knowledge management, and data-driven decision-making with Artificial Intelligence

## UP! Solutions

Advanced digital capabilities to monitor and **improve availability and efficiency** of compressors.

**AI models embedded across the UP! Solutions portfolio** to supercharge insights into critical component behavior, provide fast actionable recommendations, resolve issues quicker, and improve operations with data-driven decisions.



### Customer upside

Early failure detection, optimal availability, safer operations and lower maintenance costs

## BC ACTIVATE

Compressor diagnostic to obtain **guidance on enhancing reliability and sustainability**.

**Recommendations now augmented by AI** for accuracy, implementation speed, and deep personalization, leveraging the global expertise available within the BC Group.



### Customer upside

Boost reliability, reduce energy use, accommodate changes in process and improve sustainability

Leveraging AI to turn data and knowledge into scalable performance improvements and better outcomes for customers

# Share Purchase Agreement signed with Italian manufacturer with configurable solutions for the biogas and biomethane markets



Sales in 2025: CHF ~40 mn

Installed compressors: ~3'000

Employees: ~120

Location: Northern Italy

## Fornovo Gas offering

### Bare-shaft reciprocating compressors



### Container systems



### Skids



### Spare parts & services



# Fornovo Gas enhances our position in the biogas and biomethane markets

## Supporting energy security and energy transition in Europe and other regions

Reinforcing presence in fast-growing biogas and biomethane markets



### Acquisition rationale

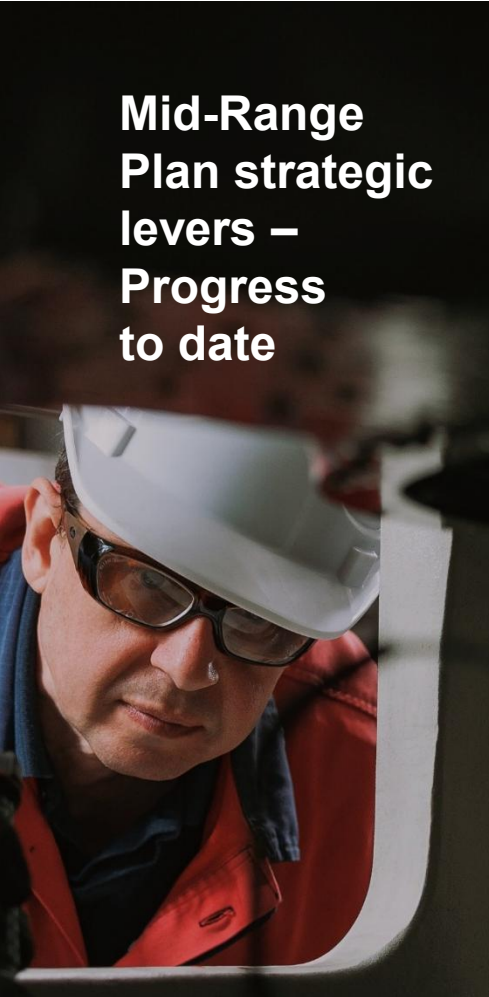
- Unlock growth in biogas and biomethane, a growing application which supports Europe's energy security
- Strengthen our position in Europe, where Fornovo Gas has a strong customer base and reputation
- Expand configure-to-order capabilities through an established platform with standardized processes
- Complement compressor portfolio of Standard High Pressure and high-speed reciprocating compressors
- Leverage our global sales network to further develop Fornovo Gas beyond Europe

# Progress on Mid-Range Plan













Fabrice Billard  
CEO

# Strategy based on four pillars, as detailed at CMD in November 2022

Further progress in FY 2025



**Mid-Range  
Plan strategic  
levers –  
Progress  
to date**

<p><b>Strengthen core business</b></p>	<p> Consolidate market share in traditional SYST markets. Focus: China, USA, PCI, LNG, Solar</p>	<p> Grow SERV as full-service provider. Focus: coverage of installed base, USA &amp; Marine</p>	
<p><b>Operational excellence</b></p>	<p> Improve product competitiveness</p>	<p> Increase efficiency via automation and digital processes</p>	<p> Leverage current footprint and SG&amp;A</p>
<p><b>Transform/build new growth avenues</b></p>	<p> Develop best combined SYST &amp; SERV offering for HME</p>	<p> Develop modular suite of digital customer offerings</p>	<p> Leverage potential from internal digitization across functions</p>
<p><b>Enhance business foundations</b></p>	<p> Embrace BC purpose and further develop our culture</p>	<p> Further develop attractive employer brand and customer experience</p>	<p> Increase sustainability of operations and supply chain</p> <p> Streamline IT and data platform</p>

# Systems Division: Systematic progress on all four pillars



Progress towards our strategic objectives

Strengthen core business



- Strengthening competitive position for Hyper Compressors with partial localization in China
- Intensified sales coverage in Western Europe, USA, Middle East
- Extended product offering in Marine

Operational excellence



- Enhancing competitiveness and resilience with Fit4Growth program in CH
- Value engineering program delivering product cost reductions
- Expanded Global Service Center in India to >300 FTE

Transform & build new growth avenues



- First references won for Ammonia bunker ship
- Geographical coverage expanded, e.g., Oman, Saudi, the Caribbean, Indonesia and South America
- Reinforcing position in biomethane market with Fornovo Gas acquisition

Enhance business foundations



- Enhanced global standards for safety rolled out
- Reinforced quality organization and processes
- Strengthened process ownership and management

# Services Division: Systematic progress on all four pillars



Progress towards our strategic objectives

**Strengthen core business**



- Acquisition of ACT in USA, reinforcing local manufacturing and service capabilities
- Nine new service locations in North America, South America, Asia and Africa
- 1'000 compressors assembled in FY 2025, with future revenue potential

**Operational excellence**



- Successful production of first additively manufactured parts (3D printing)
- Improved spare parts performance via the global manufacturing footprint
- Groundbreaking of global spare parts production center in Vadodara (India)

**Transform & build new growth avenues**



- First orders for newly launched AI-enhanced digital products Up! Solutions
- Launch of AI-based Predictive Intelligence module with Prognost NT®
- BC ACTIVATE surveys expanded and strengthened with AI
- Development of a CO<sub>2</sub> savings calculator for compressor upgrades

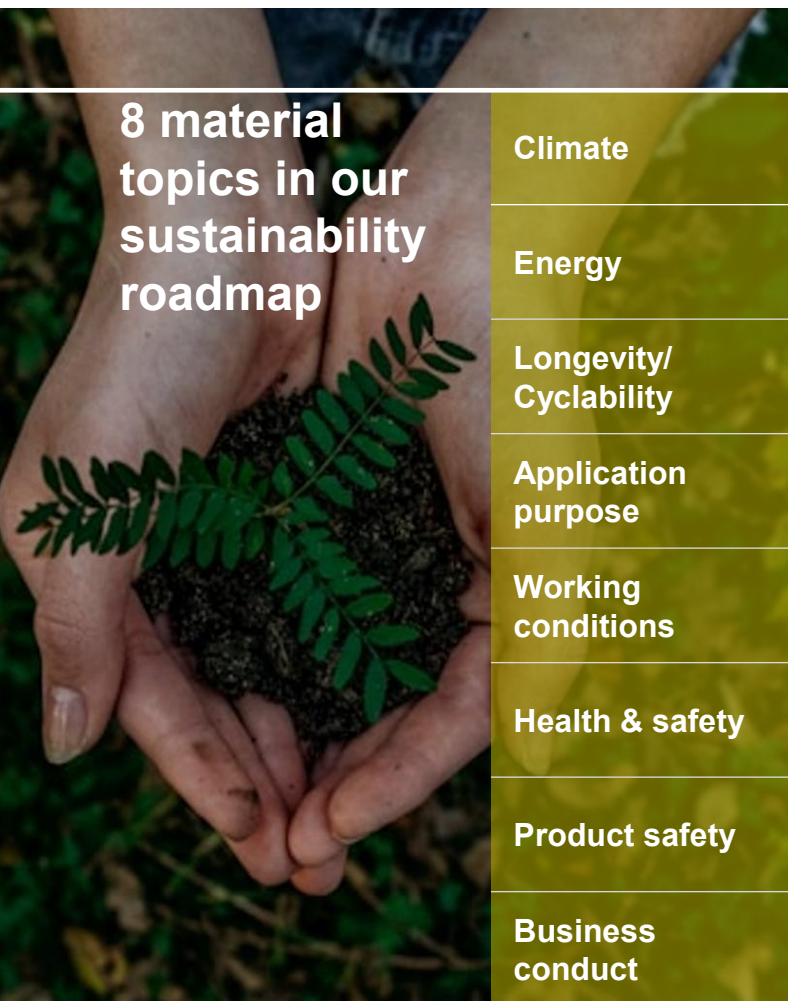
**Enhance business foundations**



- Continued to increase safety culture awareness with global standards
- Roll out of global CRM and SAP for all locations in Europe improving intercompany operations and preparing foundation for AI enablement

# Further progress in FY 2025 and well on track to reach FY 2027 targets

## Sustainability roadmap



	FY 2027 target	Status	Progress in FY 2025
Climate	<b>-50%</b> CO <sub>2</sub> emission intensity <sup>1,2</sup>	<b>-55%</b> Achieved for FY 2025	<ul style="list-style-type: none"> <li>Fuel emissions reduction through fleet optimization</li> <li>-6.5% absolute energy consumption through efficiency</li> </ul>
Energy	<b>&gt;75%</b> renewable electricity <sup>1</sup>	<b>80%</b> Achieved for FY 2025	<ul style="list-style-type: none"> <li>New solar capacities completed in service sites</li> <li>Renewable electricity purchasing roadmap for each site</li> </ul>
Longevity/Cyclability	<b>+100%</b> revamp/upgrade growth <sup>1</sup>	<b>+54%</b> On track	<ul style="list-style-type: none"> <li>Strengthened repair, refurbishment and revamp capacity through acquisition of ACT</li> </ul>
Application purpose	<b>40%</b> OI supporting energy transition	<b>37%</b> On track	<ul style="list-style-type: none"> <li>LNGM dual-fuel application remains strong</li> <li>Expanded project portfolio in low-carbon applications</li> </ul>
Working conditions	<b>&gt;4.0</b> engagement score	<b>4.2</b> Achieved for FY 2025	<ul style="list-style-type: none"> <li>Increased manager's ownership of employee engagement</li> <li>Rolled-out management-employee dialog framework</li> </ul>
Health & safety	<b>&lt;0.7</b> LTIR	<b>0.3</b> Achieved for FY 2025	<ul style="list-style-type: none"> <li>Implementation of global minimum standards</li> <li>Launched safety app for Field Service Representatives</li> </ul>
Product safety	<b>0</b> incidents	<b>0</b> Achieved for FY 2025	<ul style="list-style-type: none"> <li>Refined pre-order risk assessment and mitigation</li> <li>Rollout of process failure modes and effects analysis</li> </ul>
Business conduct	<b>0</b> incidents	<b>0</b> Achieved for FY 2025	<ul style="list-style-type: none"> <li>Training emphasis on anti-bribery and anti-corruption</li> <li>Awareness campaign for Speak Up platform</li> </ul>

<sup>1</sup> vs 2021 baseline

<sup>2</sup> Excl. Shenyang foundry, where we rely on renewable grid electricity or technological developments to achieve our ambitions.

# Financial Review

Rolf Braendli  
CFO

# Group financials

## Lower order intake, similar sales, increased profitability

### Reported results

In mn CHF	FY 2025	FY 2024	Change
Order intake	784.3	1'151.2	-31.9%
Sales	1'057.1	1'095.6	-3.5%
Gross profit	304.9	306.3	-0.4%
In % of sales	28.8%	28.0%	+0.8pp
SG&A expenses	-128.3	-129.9	-1.2%
R&D expenses	-29.8	-30.1	-1.0%
Other operating income	-5.8	-5.6	-4.1%
EBIT	141.0	140.8	+0.2%
In % of sales	13.3%	12.9%	+0.4pp
EBT	138.2	137.5	+0.5%
Income tax expenses	-28.0	-31.8	-12.0%
Net income incl. minorities	110.1	105.6	+4.3%
<i>Thereof minorities</i>	0.0	0.0	
EPS	32.60	31.20	+4.5%

- Order intake down 31.9% (-27.2% net of FX translation effects)
  - Amid market disruptions and stronger Swiss Franc
- Sales down 3.5% (+1.3% net of FX translation effects)
  - Driven by high order backlog, but slowed due to market uncertainties
- Gross margin increased by 0.8pp
  - Mainly driven by more favorable product mix in Systems Division
- SG&A at 12.1% of sales (FY 2024: 11.9%)
  - Continued cost discipline and effectiveness of SG&A spending
- R&D 2.8% of sales (FY 2024: 2.7%)
  - Focus on new applications and AI-supported Digital Solutions
- Higher EBIT margin (+0.4pp) despite lower sales
  - Mainly driven by high-capacity utilization and favorable product mix in the Systems Division
- Net Income up 4.3%
  - Lower financial expenses
  - Tax rate at 20.3% (FY 2024: 23.2%)

# Systems Division

## Significantly lower order intake, similar sales, double-digit EBIT margin

### Key figures - Systems Division

In mn CHF	FY 2025	FY 2024	Change
Order intake	476.1	825.4	-42.3%
Sales	738.6	748.8	-1.4%
Gross profit	156.1	142.8	+9.3%
In % of sales	21.1%	19.1%	+2.0pp
EBIT	79.2	67.9	+16.6%
In % of sales	10.7%	9.1%	+1.6pp

- Order intake down 42.3% (-38.2% net of FX translation effects)
  - Market uncertainty, mainly driven by US tariffs and conflict in Middle East
- Sales down 1.4% (+2.9% net of FX translation effects)
  - Continued strong operational delivery of the order backlog following high order volumes in past three years
- Gross profit up 9.3%
  - Favorable product mix vs FY 2024
  - High-capacity utilization
- EBIT up 16.6%
  - Supported by the higher gross margin
  - Strict cost management
  - Double-digit EBIT margin for the first time since creation of the Systems Division in 2016

# Services Division

## Lower order intake, sales and EBIT, EBIT margin broadly stable year-on-year

### Key figures - Services Division

In mn CHF	FY 2025	FY 2024	Change
Order intake	308.2	325.8	-5.4%
Sales	318.5	346.8	-8.2%
Gross profit	148.9	163.5	-8.9%
In % of sales	46.7%	47.1%	-0.4pp
EBIT	77.7	85.7	-9.3%
In % of sales	24.4%	24.7%	-0.3pp

- Order intake down by 5.4% (-0.5% net of FX translation effects and ACT acquisition)
  - Global uncertainties triggered by US tariffs in Q1 and Middle East conflict in Q4
  - Europe and Asia subdued driven by high energy prices & US tariffs
  - Positive momentum in US business, driven by energy needs for data centers and LNG exports to Europe
  - Full year effect of closure of 3 service centers in US in prev. year
  - Further growth in Marine, driven by growing installed based and development of a specific offering
- Sales decreased by 8.2% (-3.6% net of FX translation effects and ACT acquisition)
  - Following lower Order Intake
- Gross margin down 0.4pp
  - Reduced capacity utilization
- EBIT margin down 0.3pp
  - Lower gross margin
  - Partially mitigated by strict cost management and lower SG&A costs

# Group financials

## Strong operating cash flow - Positive net financial position

### Cash flow statement

In mn CHF	FY 2025	FY 2024
<b>Cash at beginning of period</b>	<b>222.9</b>	<b>107.2</b>
Cash Flow from Operating Activities (CFO)	149.4	212.8
Cash Flow from Investing Activities (CFI)	-29.8	-17.2
Cash Flow from Financing Activities (CFF)	-65.9	-73.5
Currency translation differences	-13.6	-6.4
<b>Cash at end of period</b>	<b>263.0</b>	<b>222.9</b>
Borrowings	-152.2	-153.3
<b>Net financial position</b>	<b>+110.8</b>	<b>+69.6</b>

- CFO at CHF 149.4 mn
  - Positive development in A/R due to strong cash collection and a further increase in advance payments from customers
- CFI at CHF -29.8 mn
  - Maintenance CAPEX and IT investments
  - Acquisition of ACT in USA
- CFF at CHF -65.9 mn
  - Dividend paid FY 2025 (CHF -60.9 mn) vs FY 2024 (CHF -52.5 mn)
- Currency translation differences at CHF -13.6 mn
  - Significant currency translation effects on cash positions in subsidiaries in China and other locations outside Switzerland
- Borrowings stable and include a Bond of CHF 150 mn with a term until September 2028

# Group financials

## Robust balance sheet

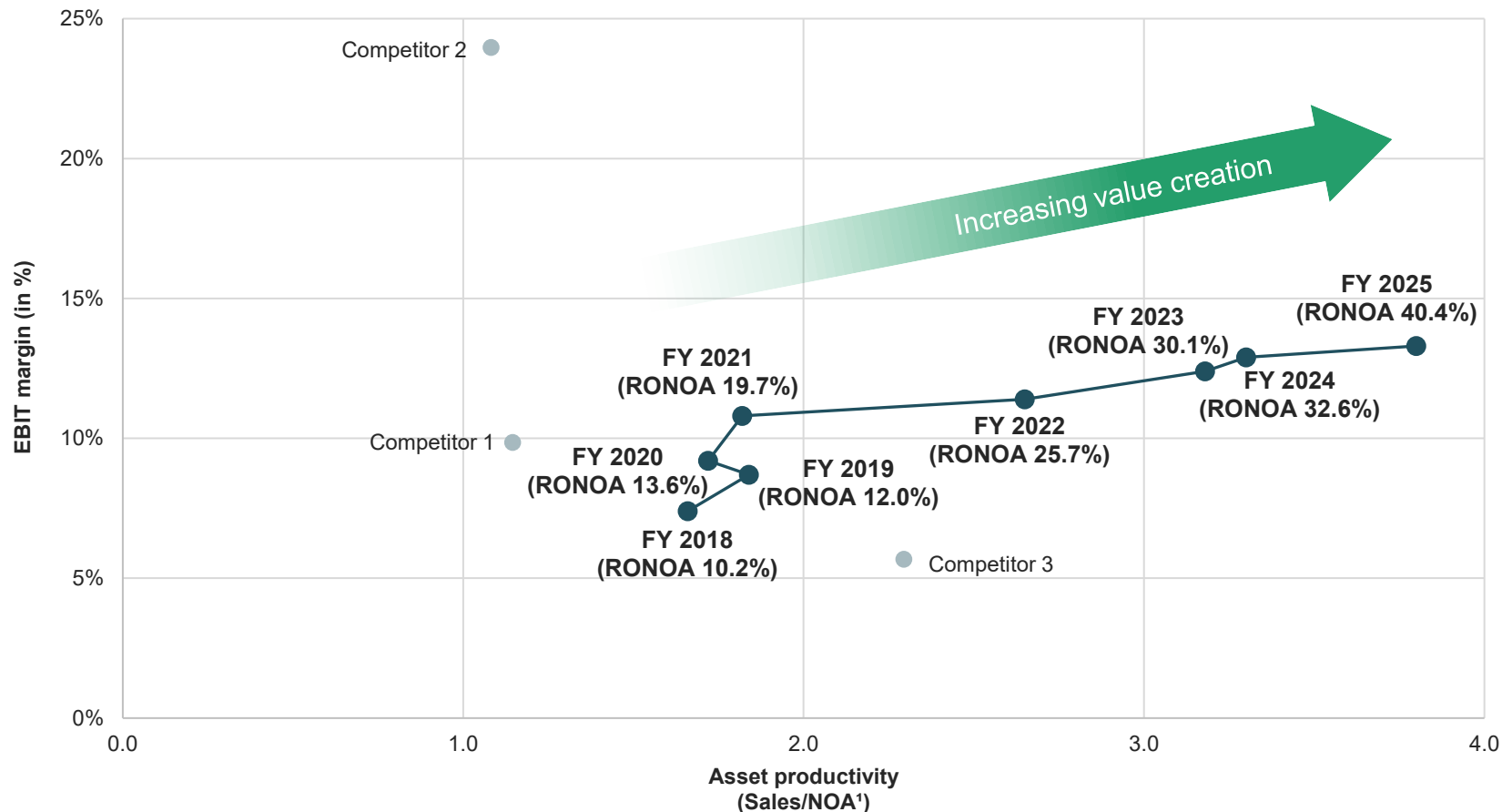
### Balance sheet

In mn CHF	FY 2025	FY 2024
Property, plant & equipment	172.6	172.8
Inventories	385.1	301.6
• Thereof WIP	187.3	133.3
• Thereof adv. payments to suppliers	74.5	47.9
Trade receivables	253.7	356.1
Trade payables	170.3	148.5
Adv. payments from customers	284.9	252.8
Shareholders equity	361.6	340.2
<i>Shareholders equity in % of balance sheet total</i>	<i>30.7%</i>	<i>29.1%</i>
Balance sheet total	1'176.6	1'167.3

- Property, Plant and Equipment stable
- Positive balance between advance payments from customers, work in progress (WIP) and advance payments to suppliers at CHF +18.5 mn, but below the exceptionally high previous-year level (FY 2024: CHF +67.7 mn)
- Trade receivables significantly reduced compared to FY 2024, despite stable sales
  - Collection of CHF ~100 mn y-o-y
  - 36.4% of trade receivables overdue more than 90 days (FY 2024: 24.2%), absolute amount stable on high level
- Total equity increased to CHF 361.6 mn (CHF +21.4 mn)
- Equity ratio surpassing the 30% ambition level, despite higher dividends paid in FY 2025 and significant negative FX translation effects on investments in subsidiaries

# Strong value creation thanks to further increase in profitability and asset productivity

RONOA has increased by +30.2pp over the past 8 years



- **EBIT margin**

- Continuous profitability improvement from 7.4% (FY 2018) to 13.3% (FY 2025)

- **Asset productivity**

- More than doubled since FY 2018
- Leveraging of existing factory network with debottlenecking CAPEX and operational excellence
- Business model of Systems Division leveraging asset base of auxiliary suppliers (e.g., motors, coolers, instruments, etc.)

- **RONOA**

- Increased almost fourfold since FY 2018
- Increase driven by EBIT-margin expansion, strong NWC management and disciplined approach to capital allocation

# Dividend per share of CHF 18.00 proposed, same as in the previous year

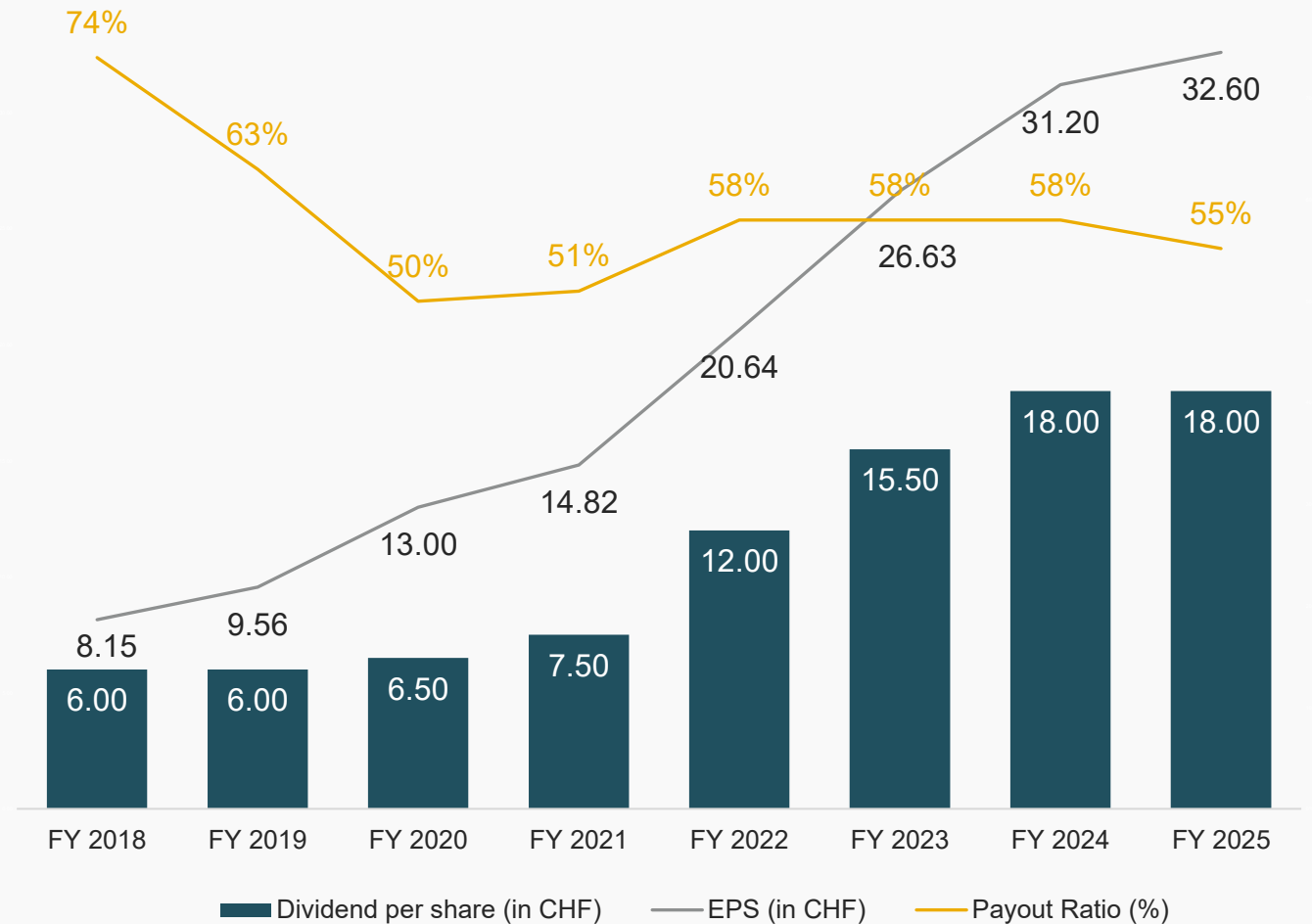
## Dividend, earnings per share, and payout ratio

### EPS

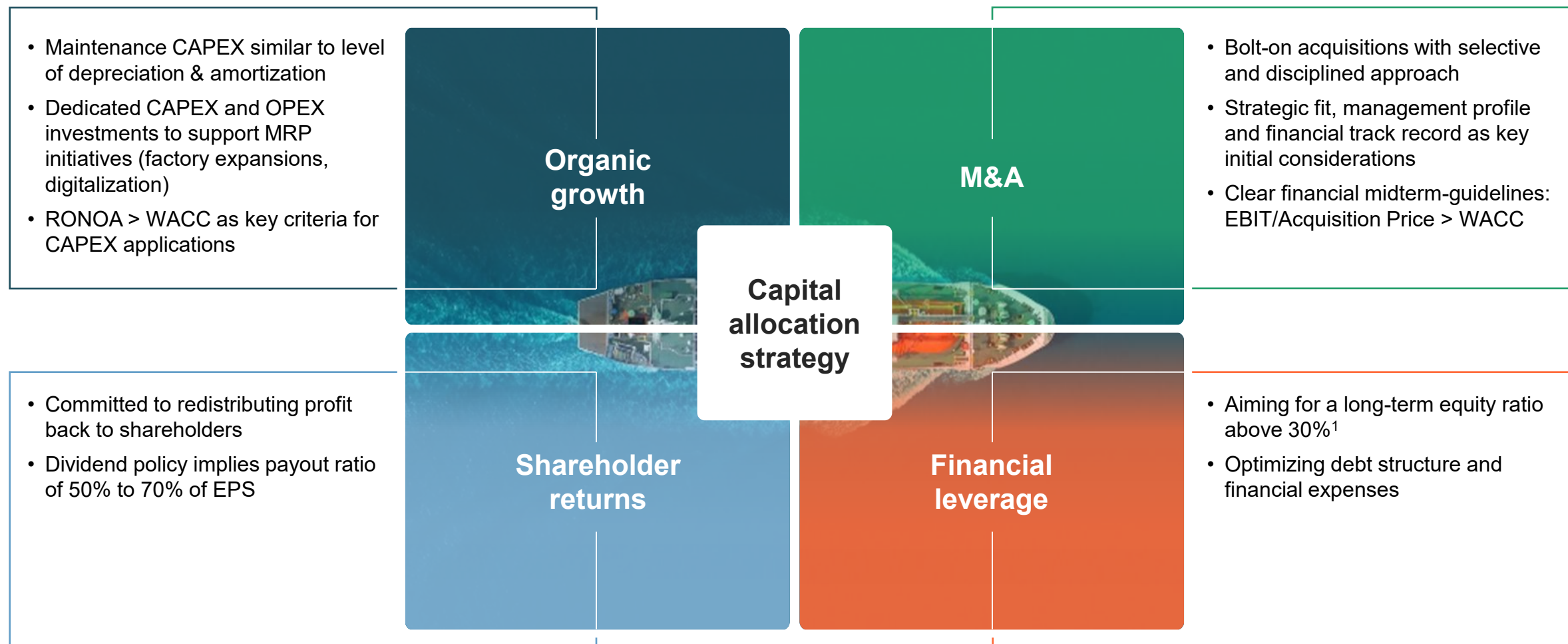
- 21.9% annual earnings per share (EPS) growth since FY 2018

### Dividend

- Paid every year since IPO in 2006
- Dividend of CHF 18.00 (proposal to the AGM)
- Same as in the previous year
- Payout ratio during MRP 2023-27 within range of 50-70%



# Disciplined and balanced approach to capital allocation with focus on RONOA



# Outlook

Fabrice Billard  
CEO

# FY 2026 outlook

## Slight sales and profitability decrease due to ongoing market disruptions

### FY 2026 Guidance

Market disruptions  
expected to continue  
in H1 FY 2026

Order backlog  
provides visibility

Mitigation measures  
to adapt to market  
conditions

Contribution of  
Fornovo Gas and ACT

Continued progress on  
strategic objectives

### FY 2026

Sales (CHF)

**900 mn to 1'000 mn**  
Stronger H2 vs H1

EBIT margin

**~12%**

### Assumptions

Global GDP:

~3% growth

Swiss Franc:

Stable

Middle East conflict:

Getting back to normal in H2

Other:

No new market disruptions

# Mid-Range Plan 2027 target achievement delayed amid ongoing market disruptions

## Mid-Range Plan

**Sales**  
CHF ~1.2 bn

**EBIT margin**  
12 to 15%

**New timing will be communicated when market visibility improves**

### Key external parameters:

- Middle-East conflict
- Catch-up in investment decisions
- LNG and LPG markets
- Global megatrends

# Mid-term outlook

## Global megatrends continue to underpin our Mid-Range Plan trajectory

### Growing global population<sup>1</sup>



- Increased demand for chemical products, polymers and industrial gases
- Rising transport and global trade leading to growing fuel requirements



### Energy security



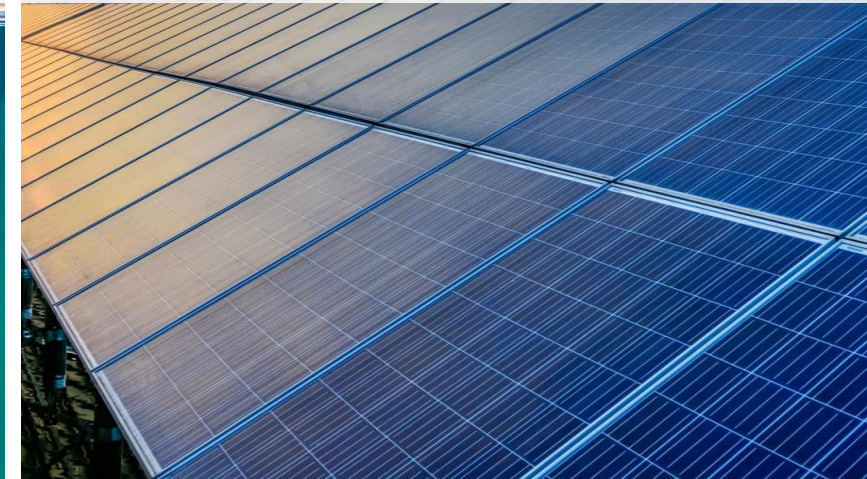
- Additional infrastructure required to ensure energy availability (e.g. storage)
- Increased requirements for locally-produced energy
- Investment to transport and trade energy



### Energy transition



- Growing share of natural gas in energy mix
- New sustainable energy infrastructure
- Monitoring and upgrade of older installations





# **Burckhardt Compression**

Compressors for a Lifetime

# Glossary

- ACT Advanced Compressor Technology
- AI Artificial intelligence
- BC Burckhardt Compression
- BOG Boil-off gas
- CCUS Carbon capture, utilization, and storage
- CMD Capital markets day
- CRM Customer relationship management
- ERP Enterprise resource planning
- EVA Ethylene-vinyl acetate
- FTE Full-time employee
- FY Fiscal year
- HME Hydrogen mobility and energy
- LDPE Low-density polyethylene
- LNG Liquefied natural gas
- LPG Liquefied petroleum gas
- MRP Mid-Range Plan
- OBC Other brand compressor
- OEM Original equipment manufacturer
- PCI Petrochemical industry
- PE Polyethylene
- PP Polypropylene
- RONOA Return on net operating assets
- SAF Sustainable aviation fuel
- SAP Systemanalyse Programmentwicklung
- SERV Services Division
- SYST Systems Division