

ANNUAL RESULTS FOR 2025

Consolidated turnover: €160.3M, +2.1% (at constant exchange rate: +3.0%)

EBITDA ⁽¹⁾ = €18.7M, +13.0%

Net Result = €6.8M, +11.8%

Dividend = €1.0 per share, +4.2%

Blagnac, France, March 11th, 2026, after closing of the Stock Market.

SOGECCLAIR, supplier of innovative solutions with high added value for a safer and less-consuming mobility publishes its financial results for the year ended December 31, 2025. SOGECCLAIR is listed on Euronext Growth in Paris.

The Board of Directors, which met on March 10th, 2026, has approved the financial statements for the year ended December 31, 2025. The audit procedures on the annual accounts have been carried out. All interim management figures improved, with EBITDA at 11.7% of turnover, increasing to €18.7 million, operating income at 6.4% of turnover, up significantly to €10.2 million, and net income at 4.3% of turnover, up to €6.8 million.

in €M	2025	2024	Variation 2025 / 2024
Turnover	160.3	157.0	+3.3M€
EBITDA ⁽¹⁾	18.7	16.6	+2.1M€
<i>As % of turnover</i>	11.7%	10.5%	
Operating income	10.2	7.1	+3.1M€
<i>As % of turnover</i>	6.4%	4.5%	
Net Result	6.8	6.1	+0.7M€
<i>Including group share</i>	5.7	4.4	+1.3M€

⁽¹⁾ Operating result – other operating income and charges + amortization expenses and operating provisions

HIGHLIGHTS OF THE YEAR

- ❖ The arrivals of a new President (Alexandre Robardey) and a new Chief Executive Officer (Philippe Brel) in January 2025. While ensuring continuity, the focus has been on profitability.
- ❖ The recruitment of a VP for BL Rail (end of September) and the commercial development of activities.
- ❖ The restructuring of the Group with the recruitment of a purchasing manager and a diversification manager for engineering activities.
- ❖ The Group continued to invest in its industrial activities, notably by increasing the production capacity of the thermoplastic composite plant and launching an additive manufacturing plant.
- ❖ While accelerating its digitalization efforts, the Group worked to maintain a high level of cybersecurity.

By geographical area

The performance measured below corresponds to the location of our subsidiaries by geographic area and not according to the geographic location of our customers.

in €M (evolution 25/24 in %)	Europe Africa	America	Asia Pacific	Holding
Turnover	120.6 (+8.6%)	36.0 (-11.9%)	3.7 (-27.4%)	0.0
EBITDA	12.9 (+40.0%)	2.9 (-47.6%)	-0.1 (-92.6%)	3.0
Operating income	7.8 (+66.4%)	2.4 (-39.3%)	-0.7 (-64.0%)	0.7

Differences are due to the rounding.

The Europe/Africa area (75.2% of turnover) saw strong growth in activity (+8.6%) across all BUs, as well as a sharp improvement in profitability (+40.0%). The year was marked by the implementation of strategic plans for the automotive and rail businesses.

The America area (22.4% of turnover) saw its profitability decline, mainly due to a deterioration in the currency effect (-€1.3 million over the financial year) and an unfavorable base effect for cabin interiors and R&D investments in the industrial segment.

The Asia-Pacific area (2.3% of turnover) began its recovery, marked by a significant reduction in losses. The decline in turnover is explained by a desire to refocus activities on intra-group business.

By Business Unit

in €M (evolution 25/24 in %)	Engineering	Solutions	Holding
Turnover	82.1 (+7.5%)	78.2 (-3.0%)	0.0
EBITDA	10.3 (+88.0%)	5.4 (-34.4%)	3.0
Operating income	9.2 (+108.8%)	0.4 (-84.5%)	0.7

Differences are due to the rounding.

BUSINESS REVIEW

Digitization efforts have focused on improving the performance of the entire Group and will be a differentiating factor in the future.

BU Engineering, expertise that drives the Group's profitability

Engineering BU leveraged its expertise to increase its market share.

Business Aviation, particularly in North America, performed well in 2025.

The Defense sector experienced strong growth thanks to support for aircraft in service and in production, as well as diversification with new customers.

Commercial Aviation returned to equilibrium, thanks in particular to better support for offshore companies and greater diversification with new customers.

BU Solutions, a year of investment despite an uncertain geopolitical and economic context

BU Solutions saw a slight decline in turnover due to the geopolitical context and experienced a drop in profitability linked in particular to currency fluctuations.

In 2025, investments in equipment (the development of a metal additive manufacturing plant, industrial improvements to the thermoplastic composite business, and R&D for the Aircraft Interior business) and currency fluctuations weighed on the profitability of the businesses but should bear fruit in 2026 at constant exchange rates.

Simulation activities are reducing losses. The cost reduction plan has begun to bear fruit. Commercial development has been penalized by the delay in public orders, but the rebuilding of the order book should enable better absorption of costs in the future. Efforts will continue in 2026 to return to profitability.

FINANCIAL STRUCTURE

Significant improvement in GEARING

With equity of €67.0 million, the financial structure is very solid.

Debt stands at -€4.7 million excluding IFRS 16 (down by €8.0 million vs. 2024), representing negative gearing of 6.96%.

This improvement is mainly due to:

- Debt repayment of €6.4 million, including state-guaranteed loans (€0.7 million remaining as of December 31, 2025),
- The reduction in working capital requirements to 69 days of turnover (down by €3.7 million)
- The reduction in inventories (down by €2.4 million over the financial year).

Available cash amounted to €23.2 million, an improvement of €3.6 million.
As a reminder, the Group does not monetize accounts receivables (€36.2 million at the end of 2025).

These figures give the Group significant investment capacity for the future.

DIVIDEND PROPOSAL: €1,0

On March 10, 2026, the Board of Directors decided to propose a dividend of €1.00 per share, an increase of 4.2%, to the Annual General Meeting of May 12th, 2026.

PERSPECTIVES

After a year in 2025 focused on assessing the current situation and improving existing operations, the new management team will update its strategic plan by the time the half-year results are presented.

The investments made in 2025 in the Solutions BU point to an improvement in operating performance in 2026.

However, the Group remains vigilant regarding the economic and geopolitical environment.

The metal additive manufacturing plant at the Toulouse industrial site will be inaugurated at the end of H1 2026.

Over the next few years, the Sogclair Group will continue to invest in the digitalization and automation of its processes. At the same time, the Group will work to maintain the highest standards in terms of cybersecurity and is committed to obtaining ISO 27001 certification.

Through the SOGECLAIR Academy, with its continuously expanding training base, the Group, which has been awarded the Happy Trainee label, affirms its desire to attract, develop, and retain the talent that drives its performance.

For several years, SOGECLAIR has been committed to implementing a Corporate Social Responsibility (CSR) approach that involves all teams. It is important to note in 2025 the creation of a dedicated committee within the Board of Directors and the structuring of governance.

To better control its emissions, the Group has now decided to internalize and carry out its carbon assessment across the entire Group. It will cover the entire turnover and will be published in the next Non-Financial Report in April 2026

NEXT PRESS RELEASE: turnover for Q1 2026, on April 29th, 2026, after closing of the Stock Market

About SOGECLAIR

Supplier of innovative high added-value solutions for safer and less-consuming mobility, SOGECLAIR brings its skills in high-quality engineering and production to a broad range of cutting-edge sectors notably aeronautics, space, vehicle, rail and defense. Supporting its customers and partners from the design and simulation stages through to the end of the product's lifetime, all along the production chain through to entry into service, the collaborators are working worldwide to offer a high-quality and proximity service to all its customers.

SOGECLAIR is listed on Euronext Growth Paris - Indice Euronext® Family Business -Code ISIN: FR0000065864 / (Reuters SCLR.PA – Bloomberg SOG.FP)

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