

Bernhard Wiehl, CFO

IR Presentation, April 2023



Autoneum. Mastering sound and heat.

Agenda

- 1. About Autoneum**
- 2. Results Full-Year 2022**
- 3. Acquisition of Borgers Automotive**
- 4. Outlook**
- 5. Technology trends**
- 6. Corporate Responsibility**

About Autoneum

At a glance

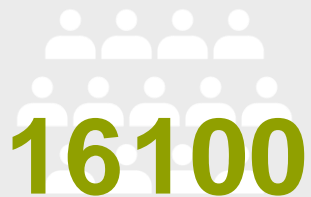
autoneum



Stock-listed company
(SIX Swiss Exchange)



Represented in 24
countries



employees



67 production facilities
worldwide

2022 in review



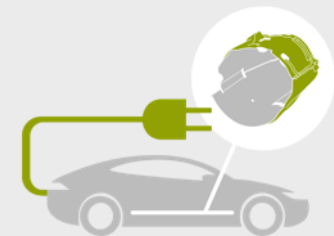
Commitment to ambitious science-
based emission reduction targets



Receipt of numerous
customer awards



Sustainability in focus:
Fully recyclable carpet systems
made of 100% polyester



Proven concepts for noise protection
extended to new applications related
to electric drives

Key financials

1 804.5

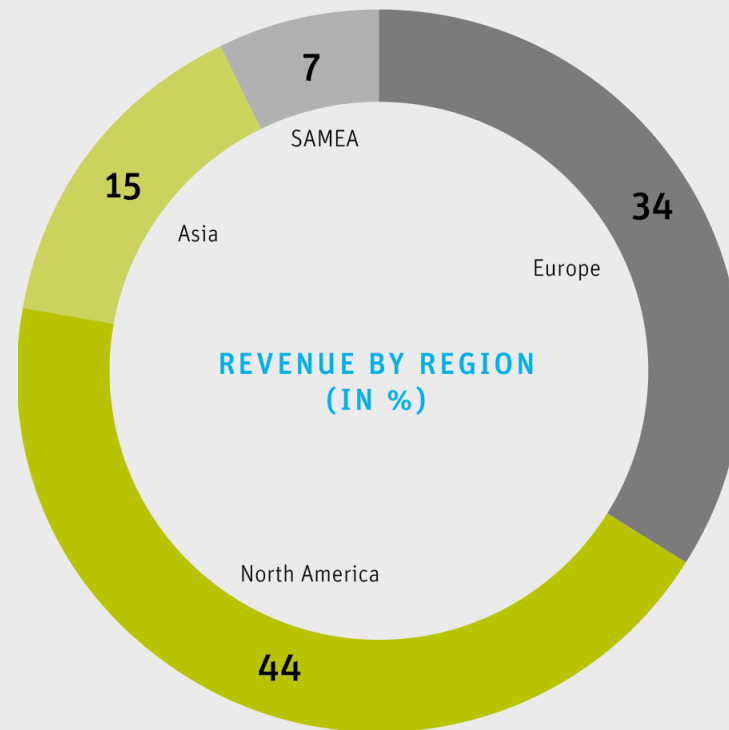
CHF million
Revenue

2.0%

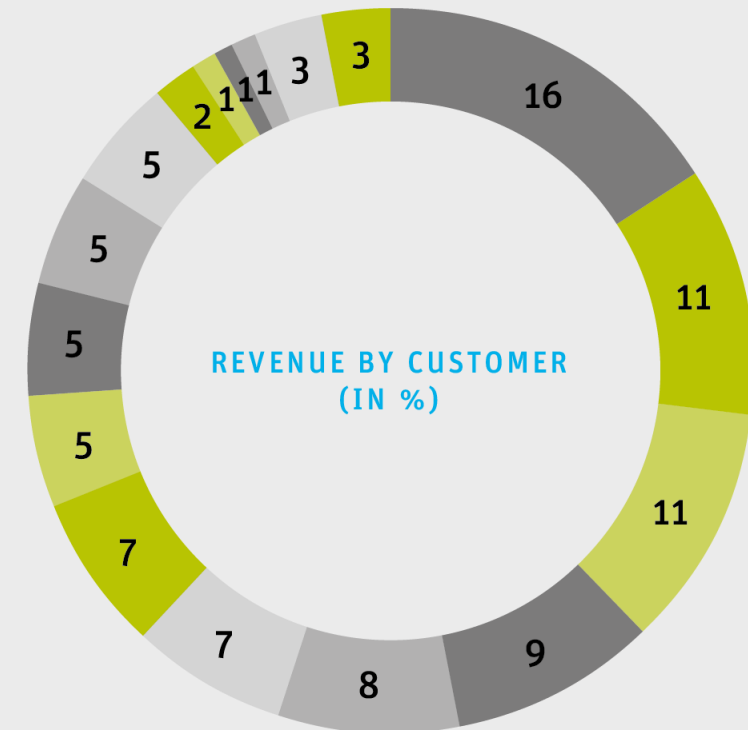
EBIT margin

10.9

CHF million
Net profit



Share of BG North America increased from 40% to 44%
Share of BG Europe decreased from 38% to 34%



Well-balanced customer portfolio

Group Executive Board



Eelco Spoelder

CEO



Bernhard Wiehl

CFO



**Dr. Alexandra
Bendler**

**Head
BG Europe**



Greg Sibley

**Head
BG North America**



Andreas Kolf

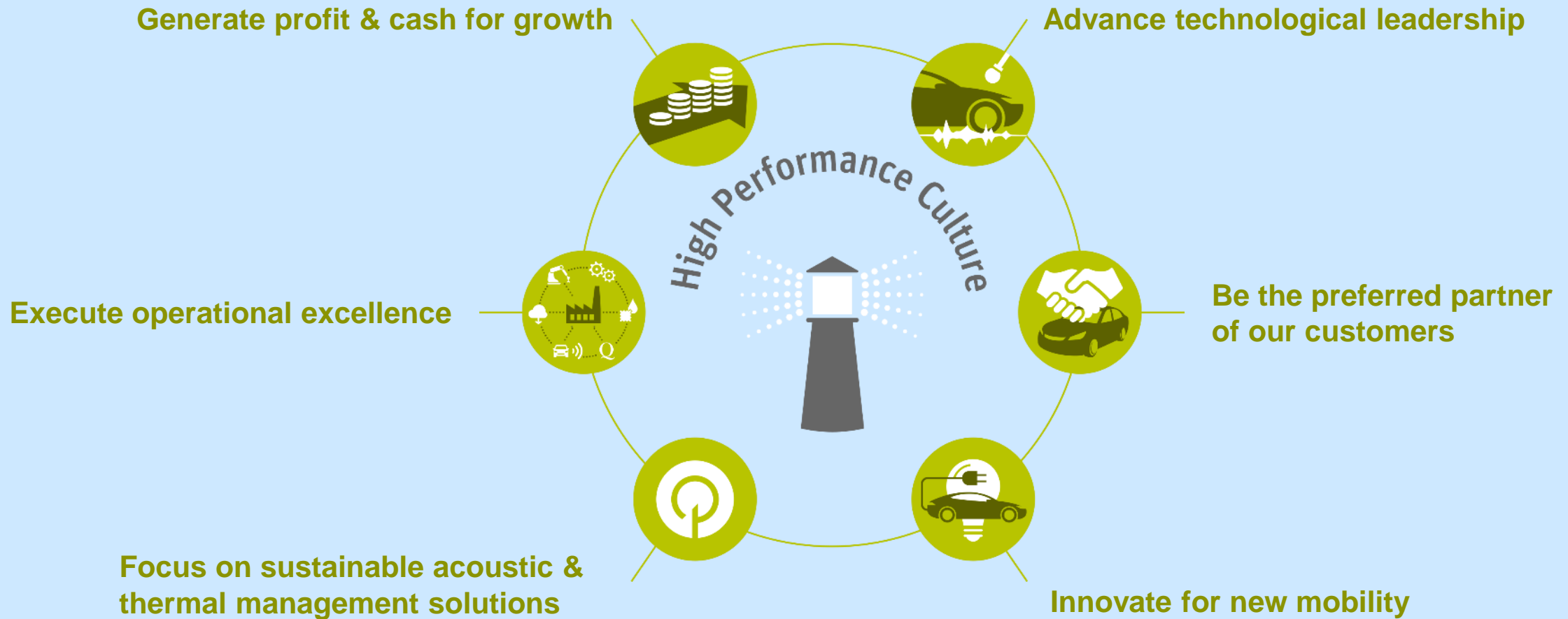
**Head
BG Asia**



Fausto Bigi

**Head
BG SAMEA**

Our six strategic priorities



Further expansion of market and innovation leadership

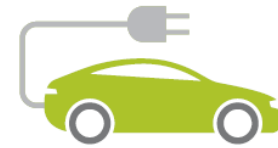
Six strategic priorities



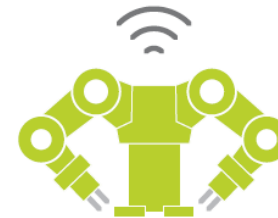
Strategic focus areas 2025



Grow Asia



Innovate for New Mobility



Drive Digitalization



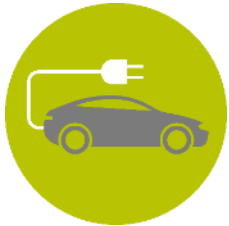
Advance Sustainability

Main levers for growth



Grow Asia to 20% of revenue

- China single largest automobile market worldwide
- Well-established footprint of Business Group Asia across the region
- Unexploited potential for new business in main market China



Innovate for new mobility

- Accelerating shift to electric vehicles
- As of 2025, most OEMs to build vehicle fleet around EV platform
- Potential to grow with both existing products and innovations targeted at electric vehicles



Advance sustainability

- New requirements and regulations, e.g. Paris Climate Agreement
- Increased sustainability targets and requirements from OEMs
- Continued focus on sustainable products and processes as a competitive factor

Our products

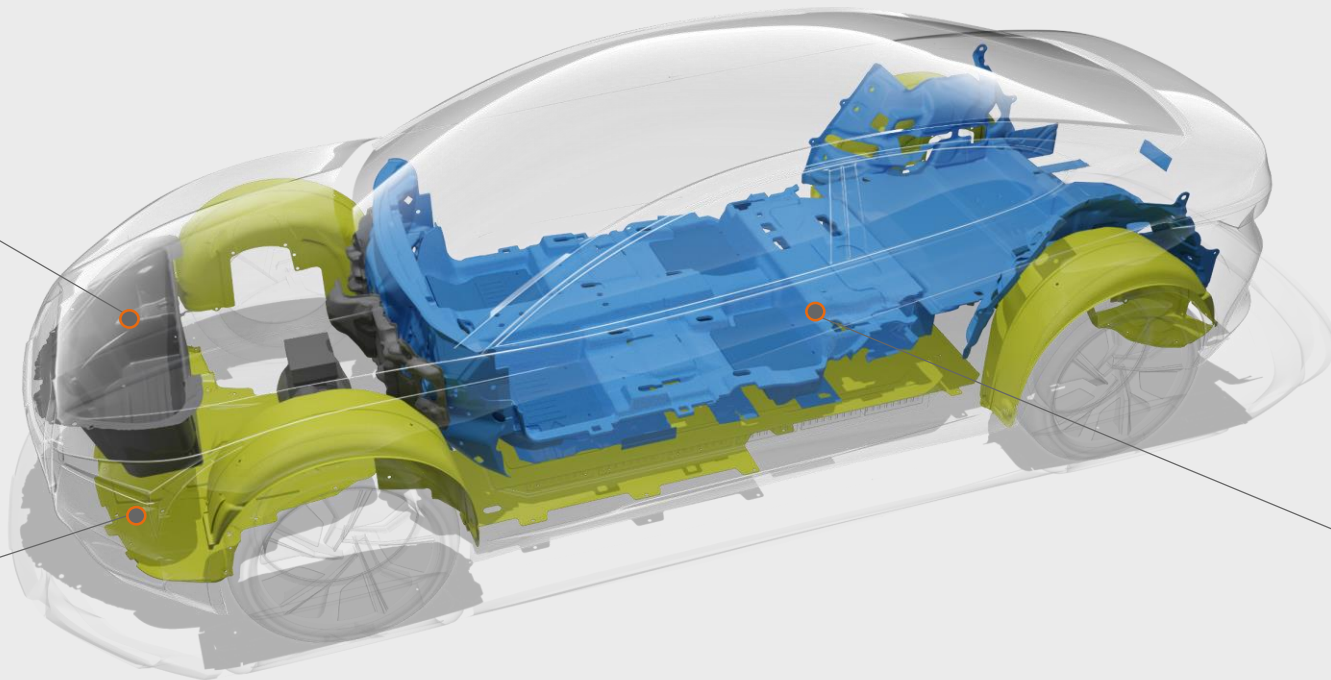
Exterior

Engine Bay

- Frunk
- Engine* and E-Motor Encapsulations
- Outer Dashes
- Outer Trunk Floor Insulators
- Hoodliners
- Engine Top Covers*

Underbody

- Under Floor and Under Engine Shields
- Under Battery Shields
- Wheelhouse Outer Liners
- Outer Tunnel Insulators*
- Heatshields*
- Battery Electromagnetic Shields



Interior

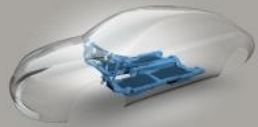



Interior Floor

- Inner Dashes
- Needlepoint Carpets
- Tufted Carpets
- Floor Insulators
- Inner Wheelhouse Insulators
- Floor Mats
- Dampers
- Inner Trunk Floor Insulators
- Trunk Trims

* Components specifically for vehicles with combustion drive.

2022 revenue split by product line

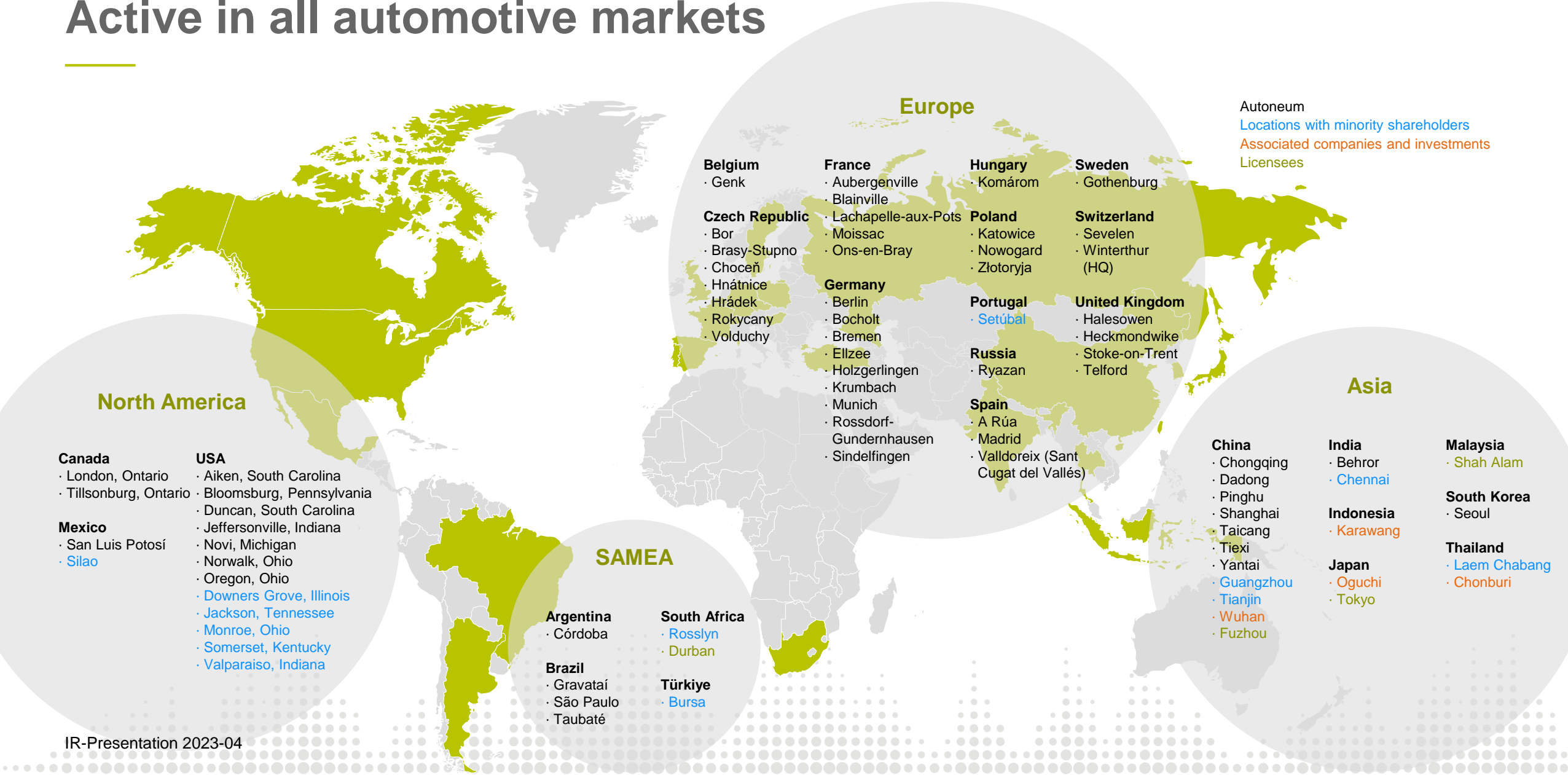
Interior floor with highest share of Group revenue

	Interior floor  <ul style="list-style-type: none"> • Non-woven carpets • Tufted carpets • Inner dashes • Floor insulator • Floor mats • Spacers/crash pads • Trunk parts 	Underbody  <ul style="list-style-type: none"> • Underbody shields • Floor pans • Heat shields • Wheelhouse outer liners 	Engine bay  <ul style="list-style-type: none"> • Engine and body mounted parts • Engine top cover • Hoodliners • Outer dashes • Water box shields • E-Motor treatment 	Body treatment  <ul style="list-style-type: none"> • Dampers/stiffeners • Other acoustic parts 	Other <ul style="list-style-type: none"> • Interior trim parts • Truck parts
BG Europe	17%	10%	4%	1%	1%
BG North America	32%	8%	4%	0%	0%
BG Asia	10%	4%	2%	1%	0%
BG SAMEA	3%	2%	1%	0%	0%
	62%	24%	10%	2%	1%

Global presence

autoneum

Active in all automotive markets



Most car manufacturers worldwide

Light vehicles



Commercial vehicles



Proximity to customers

Research and Technology Center / Global Product Management	Regional acoustic and Development Centers	Customer interface / Customer Business Units	Vehicle manufacturers
Winterthur, Switzerland <ul style="list-style-type: none"> Acoustics and thermal management testing and simulation Engineering services and sales of measurement systems Research in core technologies Intellectual property management Innovation projects management Global product management interior and exterior Business development new mobility 	 Europe Aubergenville, France Katowice, Poland Gundernhausen, Germany Sevelen, Switzerland		
	 North America Novi (MI), USA Downers Grove (IL), USA (UGN)		
	 Asia Shanghai, China Tokyo, Japan (Nittoku) Shizuoka, Japan (Nittoku) Aichi, Japan (ATN)		
	 SAMEA São Paulo, Brazil		

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2022: Year in review



Financials

- In 2022, revenue increased by 6.1% from CHF 1.7 to CHF 1.8 billion, driven by inflation compensation
- EBIT margin decreased from 3.4% to 2.0% due to higher costs in energy and materials, negative currency effects as well as lower production volumes in Europe and China
- Positive net result of CHF 10.9 million despite challenges and high inflation
- Free cash flow of CHF 57.3 million
- Waiver of dividend for 2022 proposed in view of the low net result



Market

- Global automotive production volumes* grew by 6.7%
 - Europe: -0.7%
 - North America: +9.7%
 - Asia: +8.2%
 - SAMEA (South America, Middle East and Africa): +7.7%
- In Europe, Asia and North America, Autoneum's production volumes developed below market due to an unfavorable model mix effect
- Autoneum's revenue in local currencies increased by +8.5%, mainly due to inflation-related price increases



Strategy

- Acquisition of competitor Borgers
- High level of customer awards with BEVs
- Introduction of fully recyclable 100% polyester carpet systems, already awarded by two key customers
- New modern cold chamber for testing entire vehicles, supporting the development of products for the thermal management of BEVs
- Continued progress on sustainability:
 - Autoneum submitted ambitious targets to reduce CO₂ emissions to the Science Based Targets initiative
 - More than 210 sustainability projects worldwide focusing on waste, energy and water efficiency

*Source: S&P Global Light Vehicle Production Forecasts of February 16, 2023

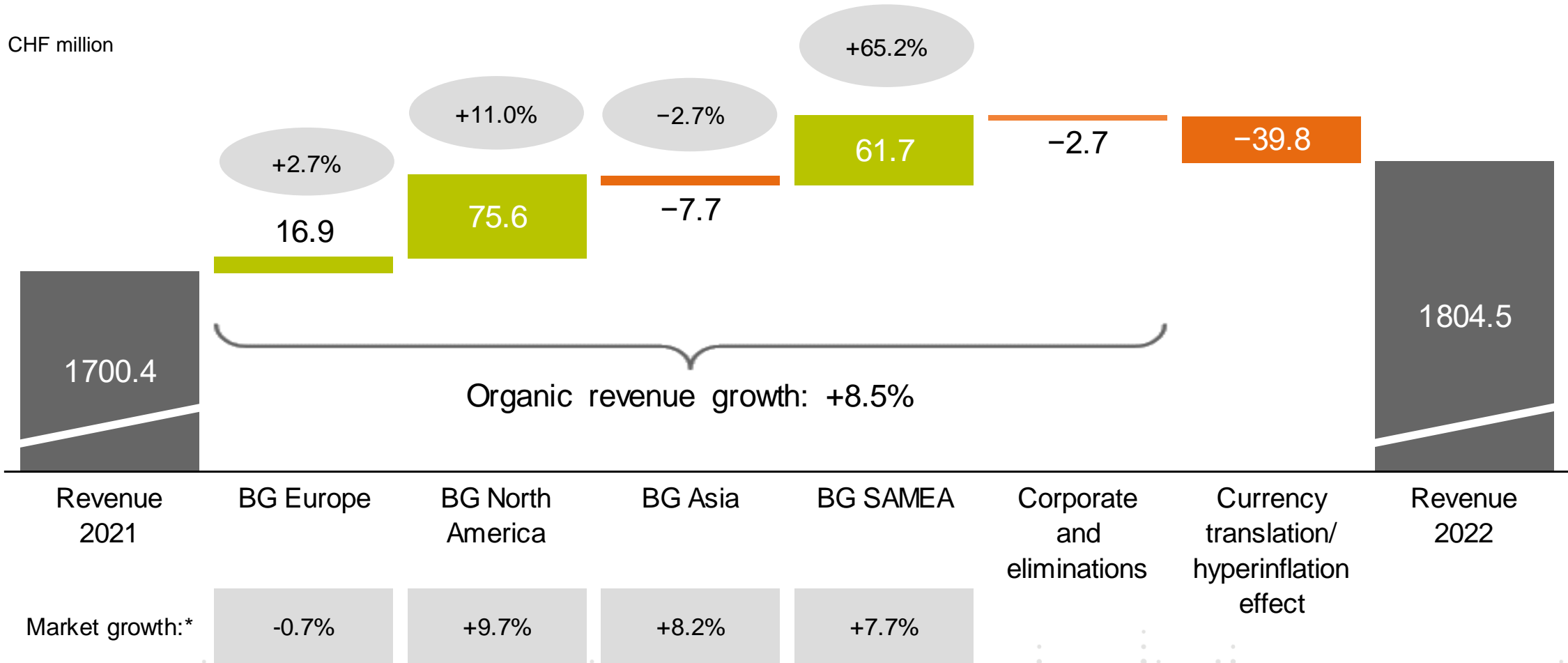
Key figures Overview

CHF million	2021	2022	Change
Revenue	1 700.4	1 804.5	104.1
EBITDA	179.8	152.1	−27.7
<i>in % of revenue (change in pp)</i>	10.6%	8.4%	−2.1
EBIT	57.5	35.4	−22.2
<i>in % of revenue (change in pp)</i>	3.4%	2.0%	−1.4
Net result	30.1	10.9	−19.2
Investments in tangible assets	34.1	39.7	5.5
Free cash flow	71.1	57.3	−13.8
Basic earnings per share (EPS) in CHF	4.91	−0.49	−5.40

Revenue development

Increase in revenue due to inflation compensation

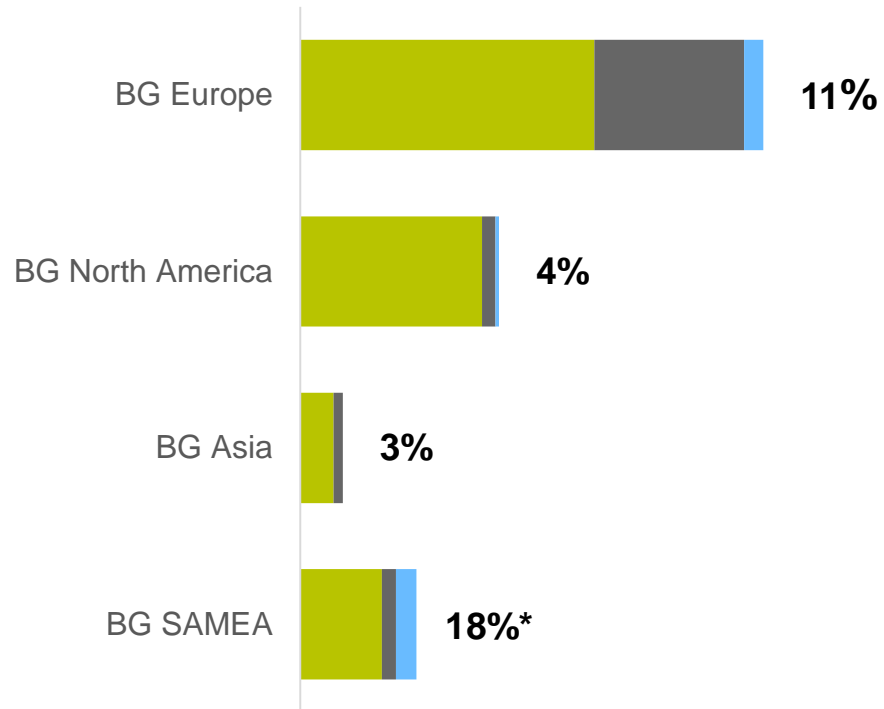
CHF million



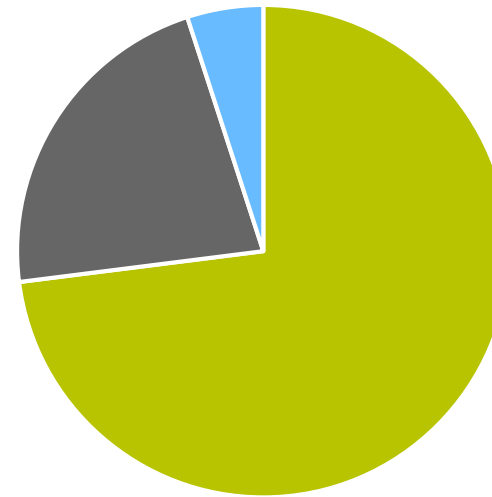
Key challenge inflation

Profitability impacted by inflationary environment

Inflation 2022 in % of revenue by Business Group



Breakdown of total inflation 2022 by cost element



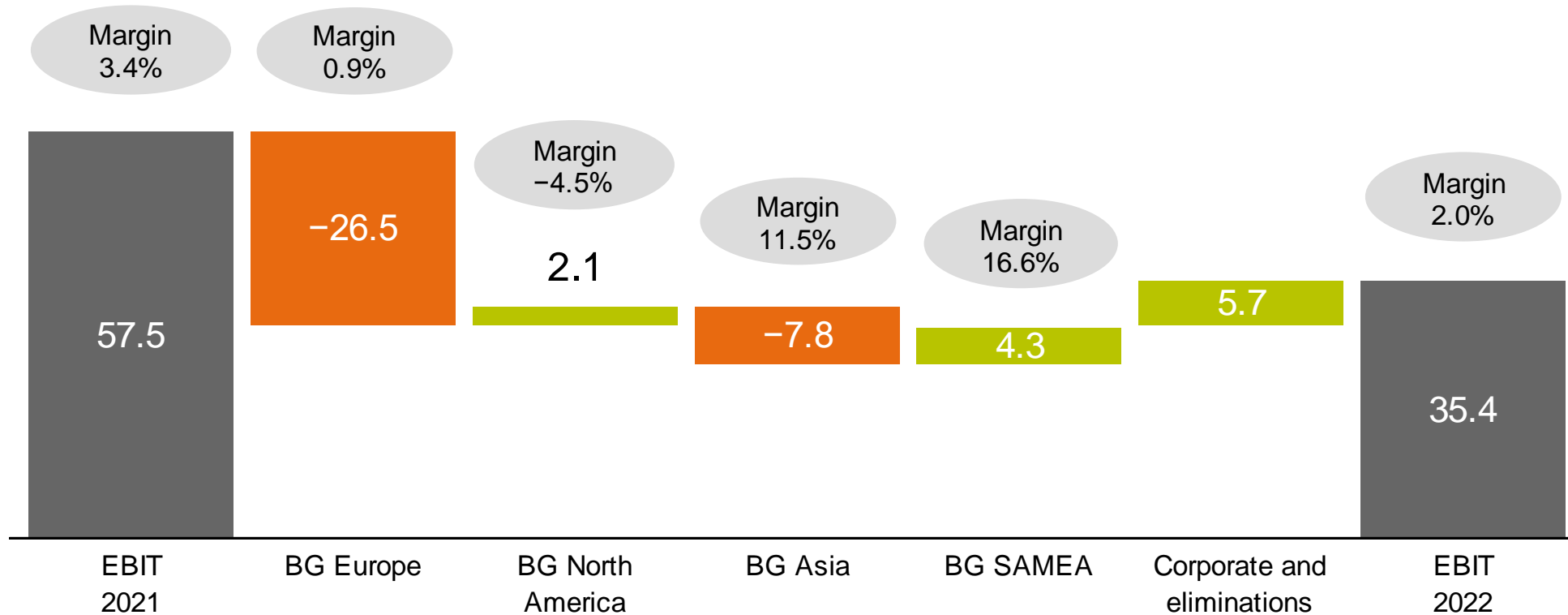
Raw materials > 90% compensated in 2022
Energy > 80% compensated in 2022
Labor compensation part of pricing 2023

* Including transactional currency effects

EBIT development

Lower EBIT contributions from BG Europe and BG Asia

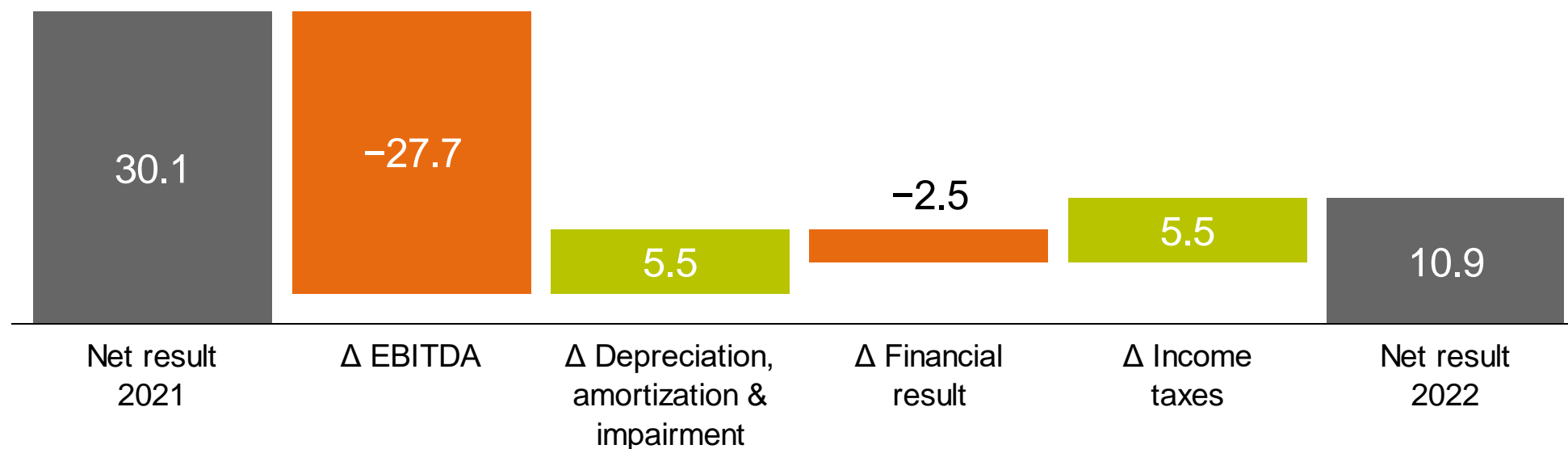
CHF million



Net result

Positive net result despite difficult conditions

CHF million



Net debt and equity ratio at stable level

CHF million	31.12.2021	31.12.2022	Change
Total assets	1 502.0	1 471.9	–30.0
Non-current assets (excl. leased assets)	681.2	626.6	–54.6
Leased assets	260.9	239.8	–21.1
Net working capital (NWC)	107.2	133.3	26.1
Cash and cash equivalents	103.7	123.6	19.9
Borrowings (excl. lease liabilities)	355.1	375.9	20.8
Lease liabilities	282.3	263.0	–19.4
Net debt (excl. lease liabilities)	251.4	252.2	0.8
Shareholders' equity	451.2	432.0	–19.2
<i>in % of total assets (change in pp)</i>	30.0%	29.4%	–0.7

- Negative currency translation effect on total assets of CHF 31.4 million
- Net working capital level increased mainly due to ongoing stop-and-go production at vehicle manufacturers
- Net debt remained almost unchanged
- Slight decrease in equity ratio due to lower net profit, dividend payments and negative currency translation effects

Cash flow statement

Solid FCF despite decrease in volumes and inflation

CHF million	2021	2022	Change
EBITDA	179.8	152.1	−27.7
Cash flows from operating activities	100.4	94.5	−5.9
Cash flows used in investing activities	−29.3	−37.2	−7.9
Free cash flow	71.1	57.3	−13.8
Cash flows used in financing activities	−288.6	−30.4	258.2
Cash and cash equivalents at the end of the period	103.7	123.6	19.9

- Decrease in EBITDA was the main factor for the reduced cash flow from operating activities
- Positive effects resulted from a reduced increase in cash spending for net working capital of CHF 23.1 million and income taxes of CHF 7.5 million
- Investments in tangible assets increased slightly by CHF 5.5 million versus prior year
- Free cash flow used for repayment of lease liabilities of CHF 27.5 million and dividend payments of CHF 19.7 million

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Aligned with strategic priorities

Borgers acquisition builds on Autoneum's communicated strategic priorities

- Borgers' wheelhouse outer liner and trunk product lines as well as their truck business optimally complement Autoneum's product and technology portfolio
- Borgers' product range is distinguished by sustainable and fully recyclable products
- The acquired product portfolio adds to the sales potential for profitable growth in the medium term outside Europe and provides additional innovation capabilities to address new mobility
- Negotiated commercial agreements with customers aimed at sustained profitability as of closing, supporting the further development of product and process technologies in both the short and long term
- Purchase price of EUR 117 million financed by a new credit facility in addition to syndicated loan and to be refinanced via a capital increase of around CHF 100 million, anchored by Artemis Beteiligungen I AG and PCS Holding AG in proportion to their current shareholding



Acquisition of Borgers Automotive

autoneum

Autoneum expands global market and technical leadership

autoneum

Global leader of **acoustic and thermal management solutions** for vehicles, represented in **24 countries** with **53 production facilities** worldwide

autoneum  **BORGERS**

Global leader of **sustainable acoustic and thermal management solutions**

CHF 2.5 billion

revenue 2022¹

~16100

employees 2022

67

production facilities

 **BORGERS**

Manufacturer of **acoustically effective components** for motor vehicles, operating in **8 countries** with **18 locations** worldwide

Revenue 2022

CHF 1.8 billion

Employees 2022

11 622

Production facilities

53

Revenue 2022²

EUR ~700 million

Employees 2022²

~4460

Production facilities²

14

13.2% 78.6% 8.2%

¹ unaudited and based on average exchange rate 2022 (EUR/CHF 1.01)

² unaudited and including joint ventures in China

Compelling transaction to deliver long-term shareholder value



- 1 Strengthens Autoneum's position as the global market leader in acoustic and thermal management solutions
- 2 Highly complementary product, technology and customer portfolios with additional upside from strengthened geographic presence
- 3 Strengthen ESG with Borgers' longstanding expertise in sustainable and recycled materials
- 4 Improves position in EV product offering and enables to further benefit from automotive sector megatrends
- 5 Accretive deal supported by renegotiated OEM contracts, synergies and facilitated integration due to common language and heritage

The perfect complement

Product line	⊖ Autoneum ⊕	⊖ Borgers ⊕	⊖ Combined ⊕
Interior			
Underbody shields			
Wheelhouse outer liners			
Trunk trim			
Engine bay			
Truck			
Seat back trims			

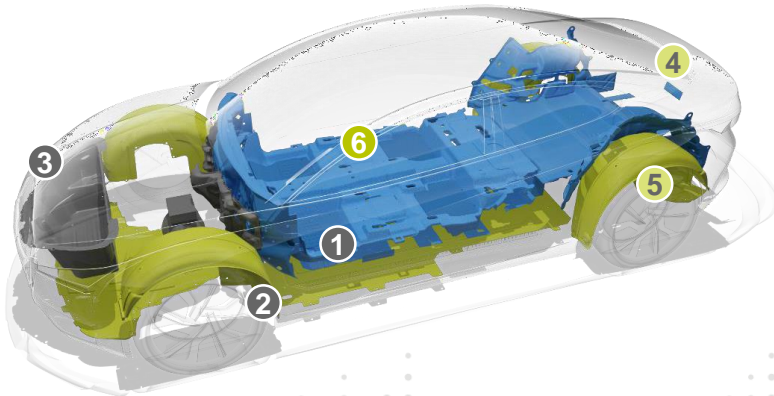
Legend:



Minimal overlap in products and technologies

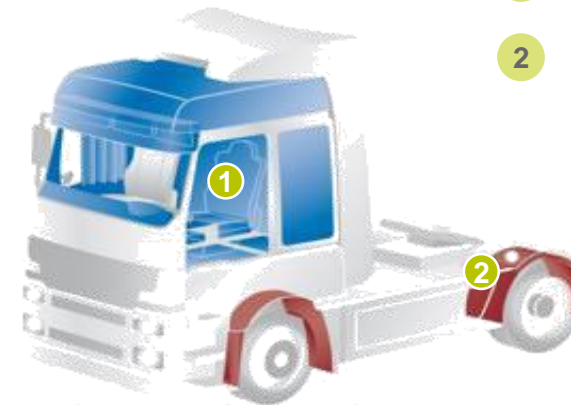
- Overlap in product portfolio estimated at ~25% of Borgers' revenue, Autoneum's global presence and customer base will unlock further growth potential in Borgers' product portfolio
- Customers will benefit from a stronger solutions portfolio, material technology capabilities as well as a more efficient and synergistic distribution network
- Autoneum poised to become a strong player in freight trucking leveraging on Borgers' capabilities

Car capabilities



- 1 Interior
- 2 Underbody shields
- 3 Engine Bay
- 4 Trunk Trim
- 5 Wheelhouse outer liners
- 6 Seat back trims

Truck capabilities



- 1 Passenger compartment
- 2 Exterior

● Strengthened product offering ● Highly complementary product offering ● New product offering

Borgers products and materials enhance ESG-focused offering

Selected ESG-focused Borgers products

Blue label wheelhouse outer liners



- World's first textile wheelhouse outer liner made from ocean plastic
- Waste-free production and suitable for End-of-Life recycling

Exterior



- Wheelhouse outer liners and underbody shields
- Sustainable and recyclable textile products

Luggage compartment



- Components made of Propylat and LowMass recycled cardboard honeycomb
- Weight reduction of up to 50%

Propylat – outstanding material concept for recycled nonwovens

- *Propylat* is consolidated by binding fibers (both synthetic and natural) without additional use of a chemical binder
- Thermoplastic bonded and recycled nonwovens in all variations since 1996
- Industry benchmark in the use of recycled fibers including reutilization of own production waste
- Innovative and environmentally friendly textile material used in the interior and exterior trim of vehicles
- Mixed densities lead to a combination of different characteristics such as sound absorption and inherent quality
- Adapted solutions for multiple applications: *Propylat^{TRIM}*, *Propylat^{NVH}* and *Propylat^{ISO FELT}*



Borgers has more than 150 years of experience in textile recycling and sustainable products and processes

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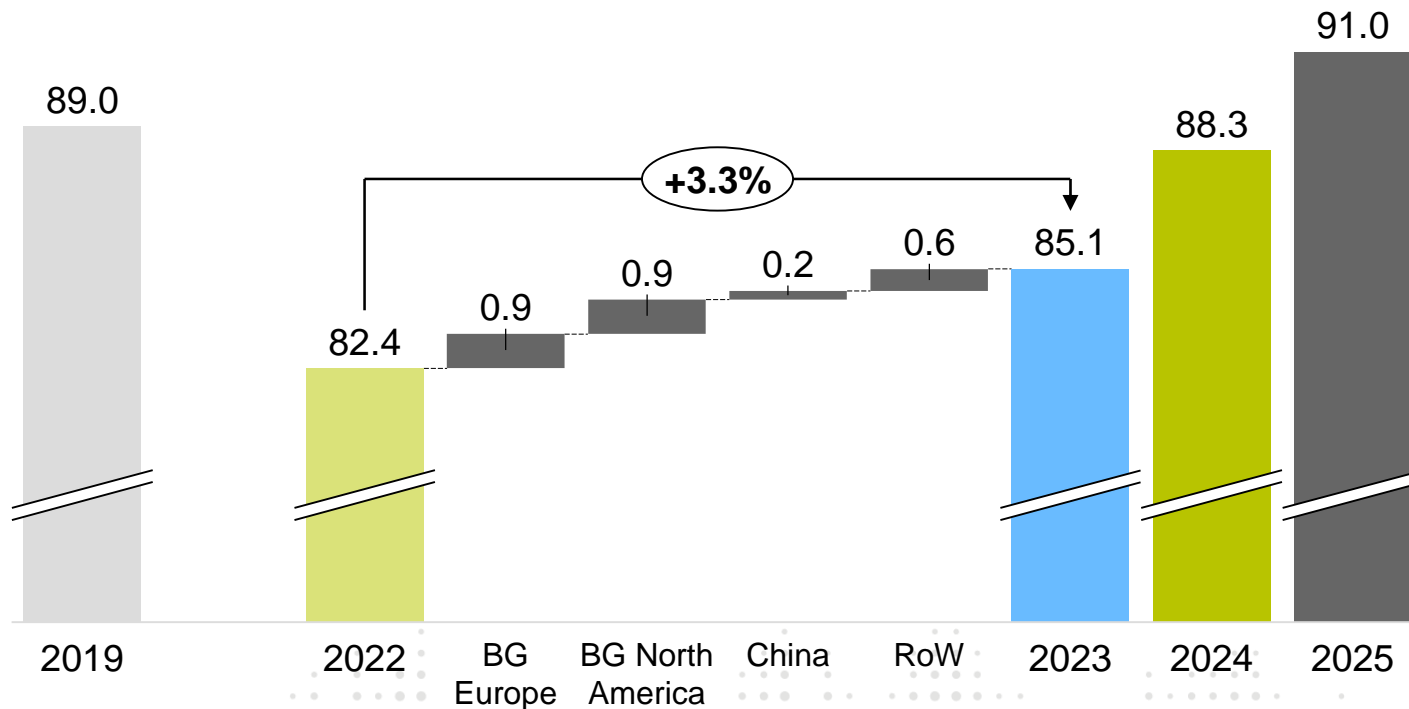
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Light vehicle production forecast

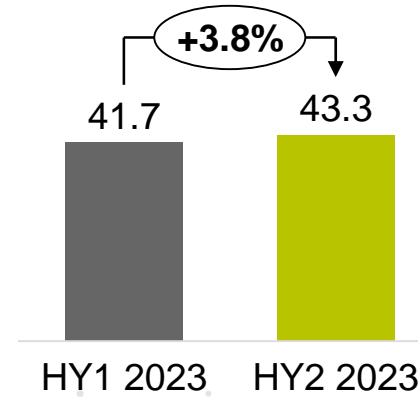
Moderate global growth of 3.3%* expected in 2023

Yearly global automobile production

million units



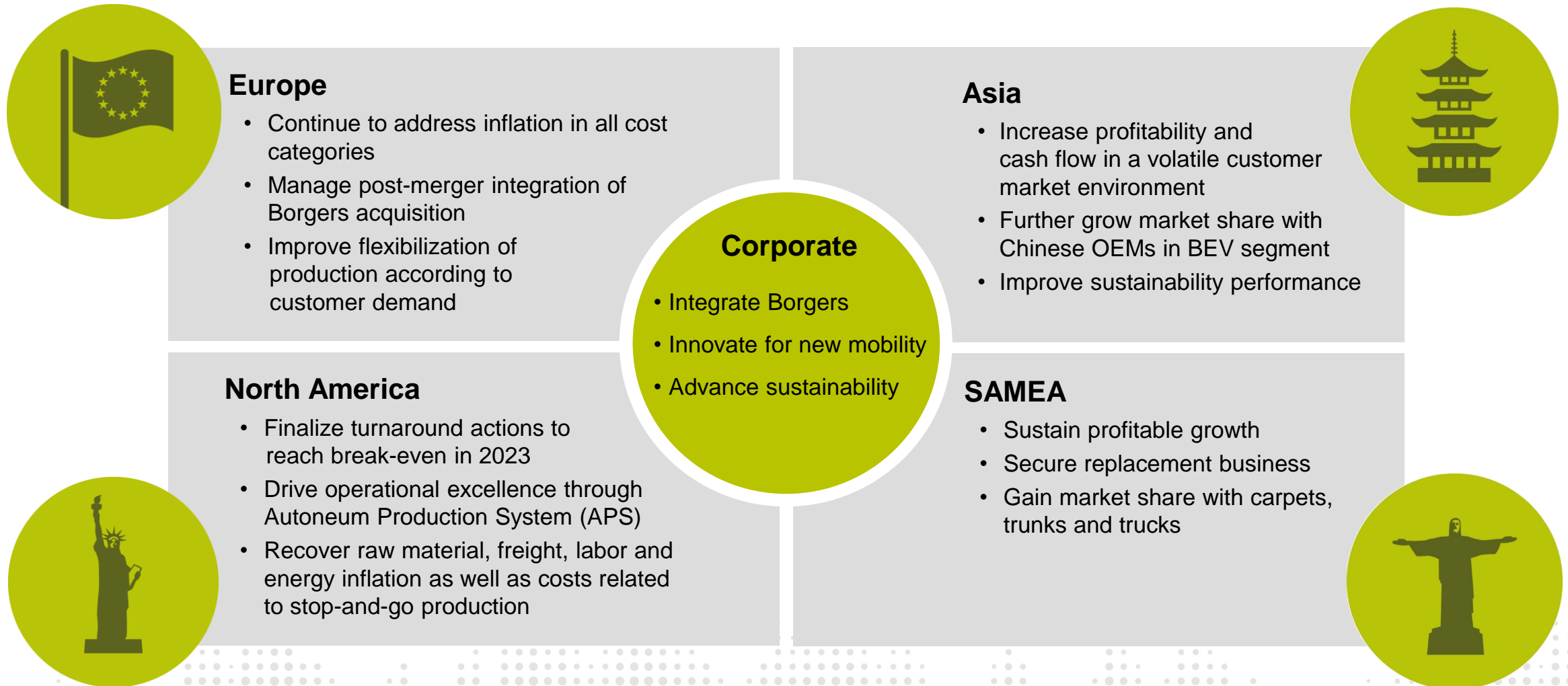
- Global production volumes are forecast to grow by 3.3%* in 2023
- Market growth driven by Europe and North America
- 2019 volumes could be exceeded by 2025
- Second half year is expected to be 3.8% higher than first half year of 2023



*Source: S&P Global Light Vehicle Production of February 16, 2023

Action plan 2023 per region

Focus on profitability, break-even at BG North America & Borgers integration



Guidance 2023



Market

Global automotive production is forecast to increase by 3.3%¹ in 2023 compared to 2022. Autoneum anticipates production volumes in the different regions to develop in line with S&P market forecasts.



Revenue

Based on the forecast market development¹ and a successful closing of the Borgers acquisition², Autoneum expects total revenue of CHF 2.4 to 2.5 billion for the financial year 2023.



Profitability and FCF

The Company expects an EBIT margin of 3.5 to 4.5%² and a free cash flow in the higher double-digit million range for 2023.

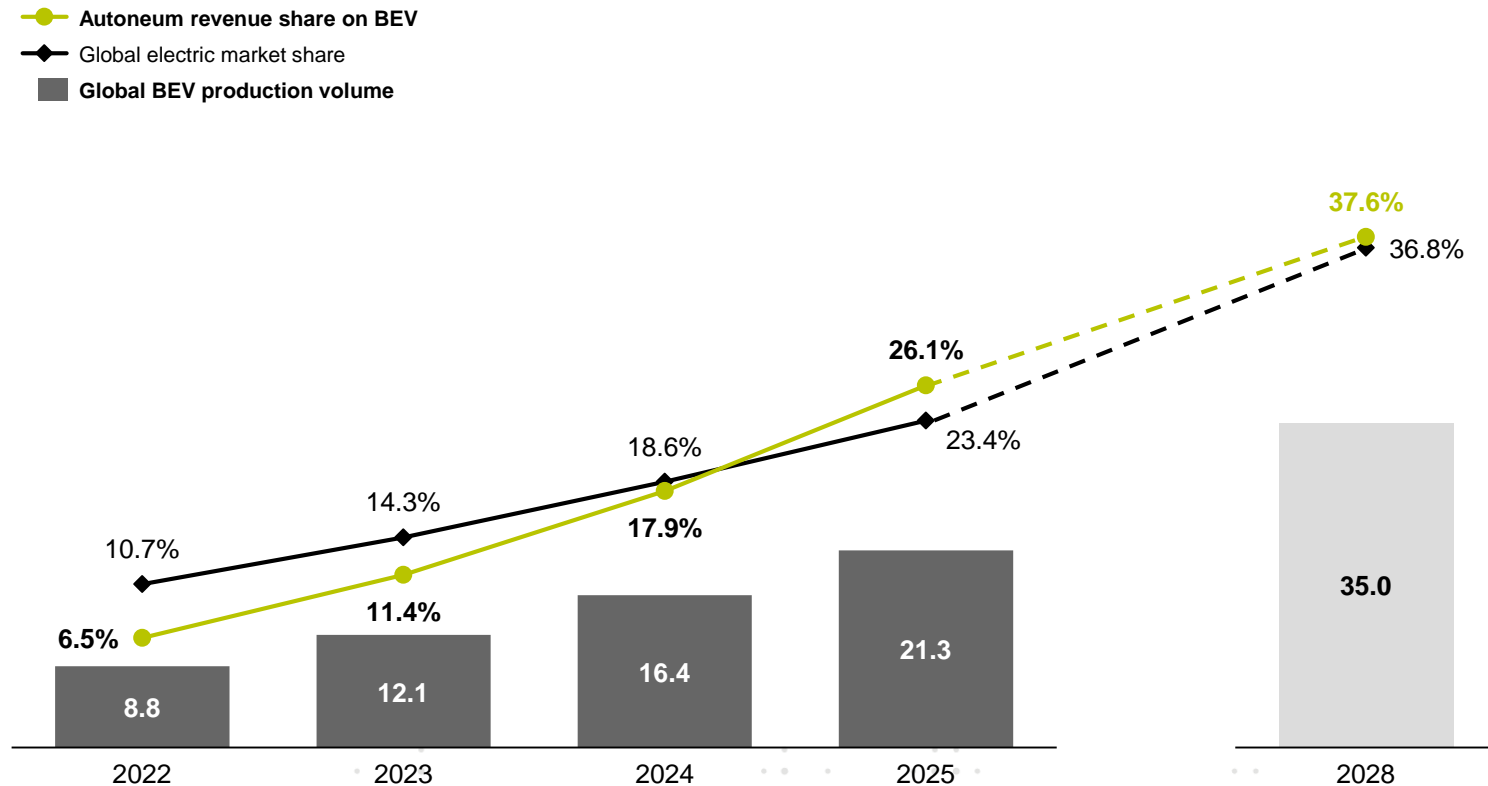
¹ Source: S&P Global Light Vehicle Production Forecast of February 16, 2023

² This guidance is based on a successful closing of the Borgers acquisition by the end of March 2023 and includes expected Borgers figures from April 1 to December 31, 2023.

Revenue with BEVs to outperform BEV market share

Global EV powertrain forecast*

2022 – 2028 (million units)

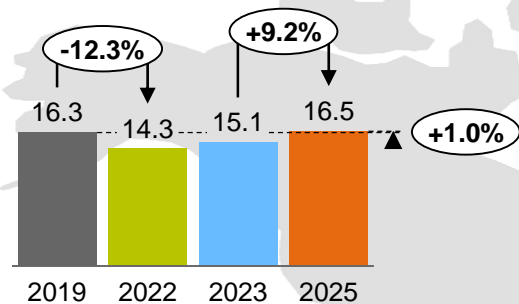


- **Current order intake with BEVs** is targeted to **increase significantly** by **2025**, with Interior business being the major driver.
- **Revenue with traditional Autoneum product portfolio** into BEVs growing **above EV market share** as of 2025

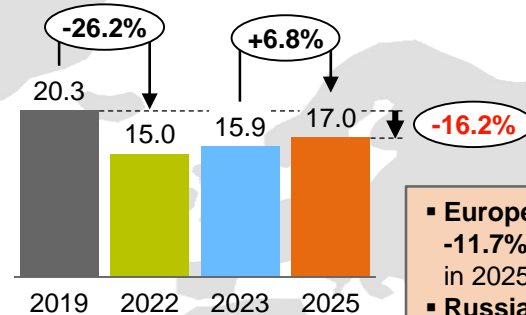
Light vehicle production by region

Global growth until 2025 mainly driven by China

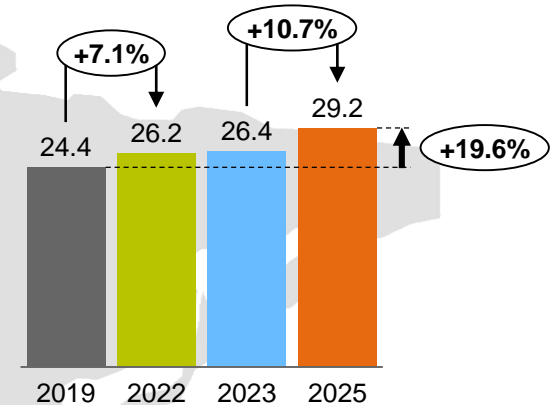
- 89.0 m units in Actuals 2019
- 82.4 m units in Actuals 2022 (-7.4%) vs. 2019
- 85.1 m units in Actuals 2023 (+3.3%) vs. 2022
- 91.0 m units in Forecast 2025 (+7.0%) vs. 2023



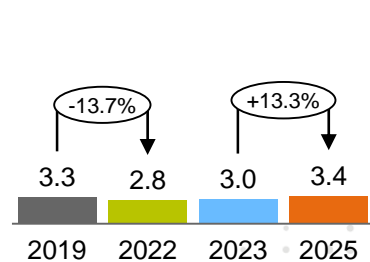
North America



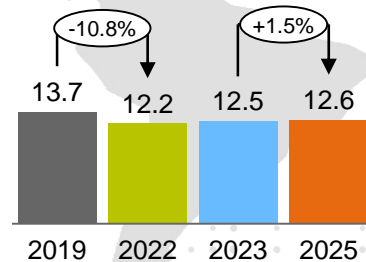
BG Europe



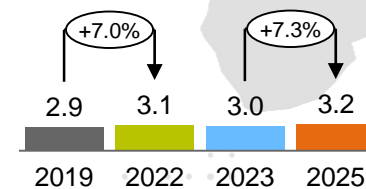
China



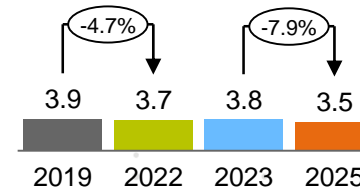
South America



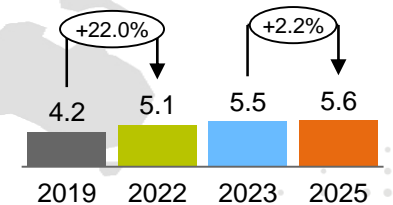
Rest of Asia



Rest of World



South Korea



India

- Europe excl. Russia to decline by -11.7% from 18.7m in 2019 to 16.5m in 2025 vs. -16.2% incl. Russia
- Russian production volume to decline by 1.1m from 1.6m in 2019 to around 0.5m in the foreseeable future

Medium-term financial targets

Revenue development in line with market

EBITDA margin of 13%

Free cash flow 6% of revenue

Equity ratio >35%

Dividend payout of at least 30% of net profit
attributable to shareholders of Autoneum Holding Ltd

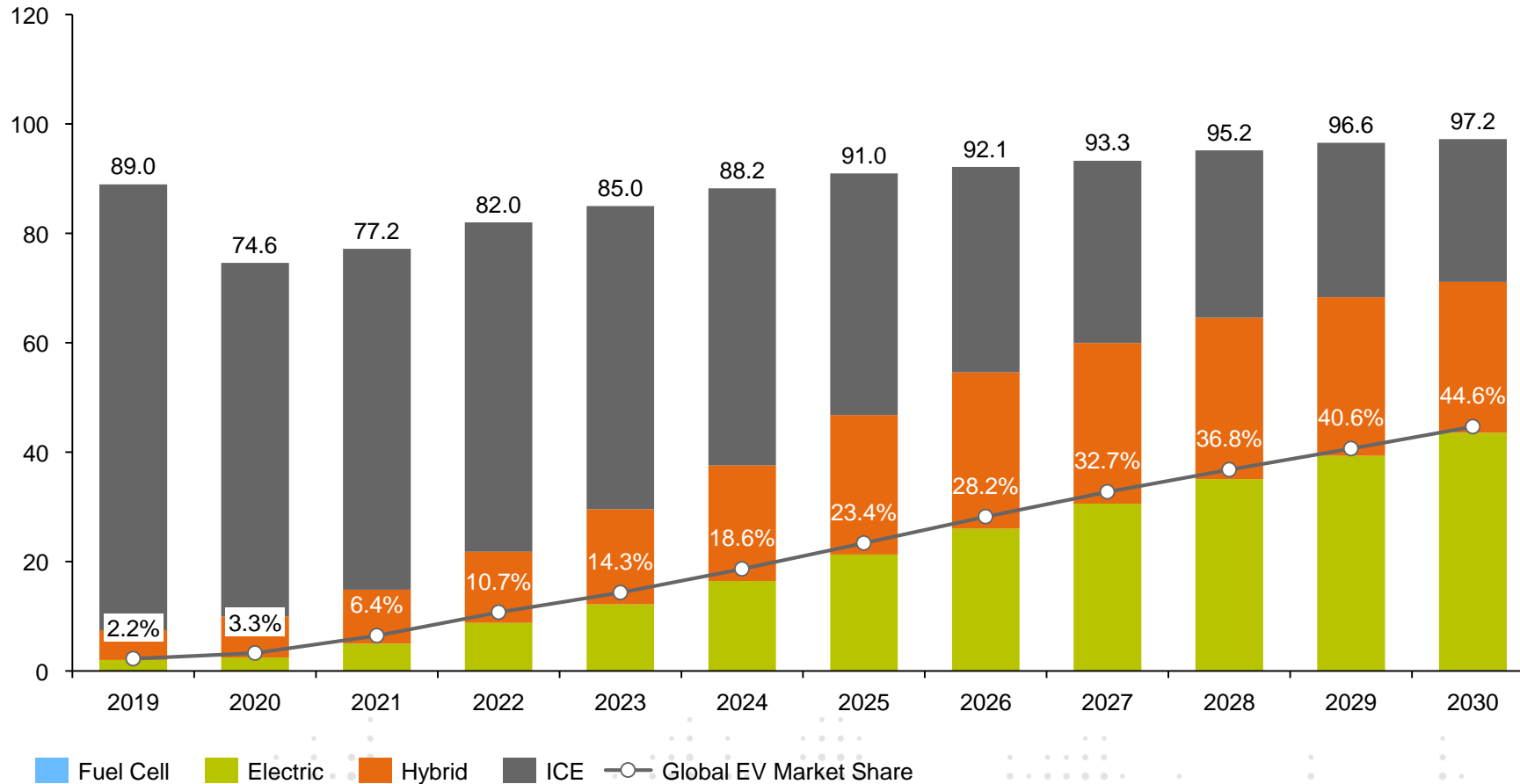


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Expected production volumes by drive type

million units



- Accelerating shift to electric vehicles: By 2030, more than 40% of light vehicles produced globally are expected to be BEVs.
- Revenue with traditional Autoneum product portfolio into BEVs expected to grow above electric vehicle market share as of 2025.
- In 2022, more than 55 electric models worldwide were equipped with Autoneum components.
- In 2022, more than half of Autoneum's new awards were for pure electric vehicles.

Traditional product portfolio position for BEVs

Products		ICEs	Hybrids	BEVs
Carpets		✓	✓	✓
Floor insulators		✓	✓	→
Inner dashes		✓	✓	→
Underbody systems		✓	✓	→
Wheelhouse outer liners (WOL)		✓	✓	→
Trunk (Trunk Side Trim)		✓	✓	→
Heatshields		✓	✓	✗
Engine bay		✓	✓	✓
Rear insulation		✓	✓	→

Connectivity

Autonomous

Shared

Electrification

Sustainability

New mobility trends

Topics	Opportunities
Missing heat source (engine)	Acoustic components with thermal properties
Reducing vehicle weight	Lightweight construction expertise and product portfolio
Aerodynamics	Expanding underbody business
Road noise more present	Insulation of exterior noise
Sustainable technologies	Recycled fibers
Powertrain noises	Tailored acoustic solutions, diagnostics and simulations
Aesthetics in the interior and trunk	Material innovations
Comfort in autonomous vehicles	New noise insulation requirements
Shared use	Cleanability and durability

Components

Inner dashes, carpet systems



Wheelhouse outer liners



Frunks

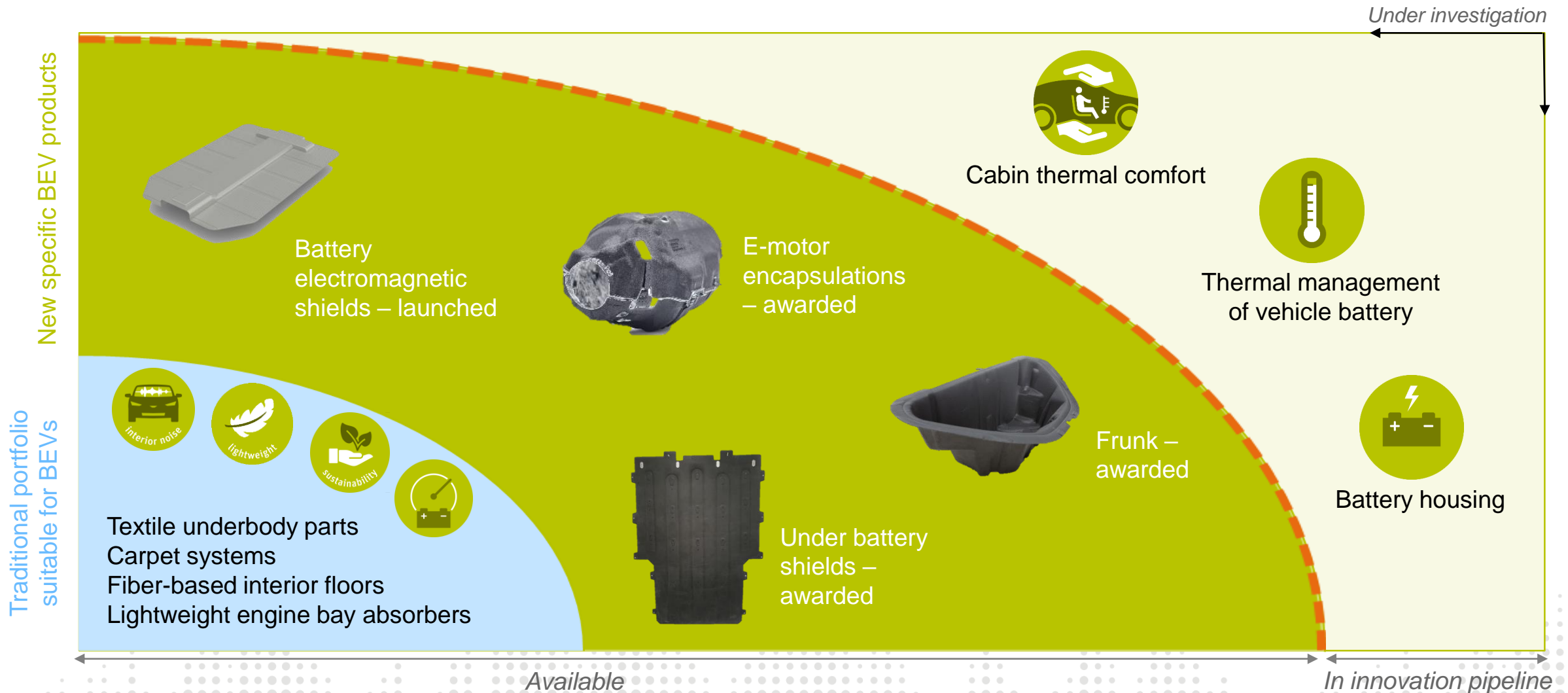


Underbody systems



Product innovations for electric vehicles

Development roadmap



Key takeaways



Electrification and sustainability are the key driving forces for future development.



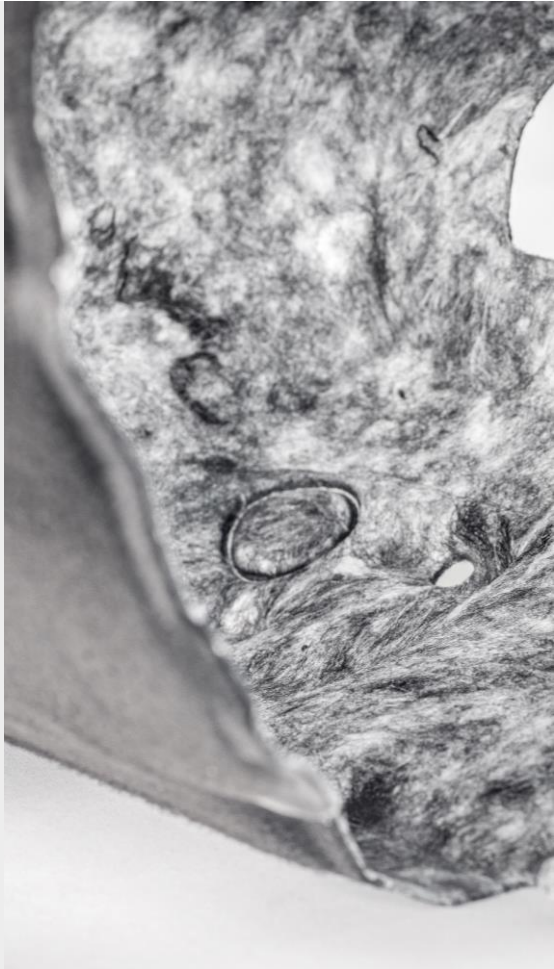
Autoneum has developed and successfully launched five new products for BEVs applying and optimizing existing technologies for new requirements of electric vehicles.



New products include vehicle components such as frunks and e-motor encapsulations as well as specific battery housing components.



Lightweight and thermal management remain key drivers for new products for future BEV generations.



Technology

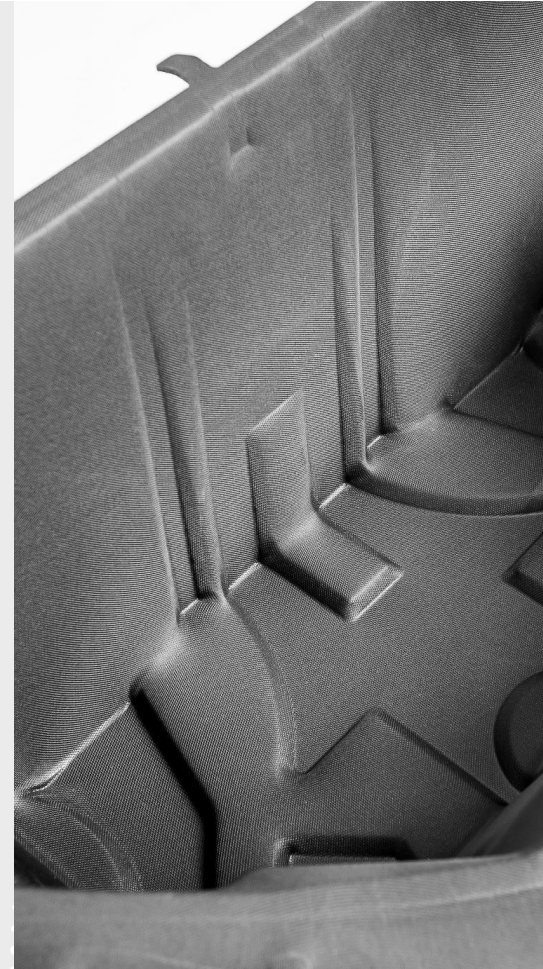
Hybrid-Acoustics PET

Application

- E-motor encapsulations

Advantages

- Contains up to 50% recycled fibers
- Made of 100% PET and thus fully recyclable at the end of the product life cycle
- Optimized noise protection at the source and at the same time 50% lighter than comparable standard solutions



Technology

Ultra-Silent

Application

- Frunk for electric vehicles
- Underbody systems

Advantages

- 50% lighter than plastic solutions common today
- Made from up to 70% recycled material
- Sound-absorbing textile material composition

Process

Alternative Backcoating (ABC)

Application

- Needlepunch carpets

Advantages

- Use of thermoplastic adhesive instead of latex
- Improved recyclability at the end of the product life cycle
- Manufacturing process requires no water and less energy than the production of latex-based backcoatings



Technology

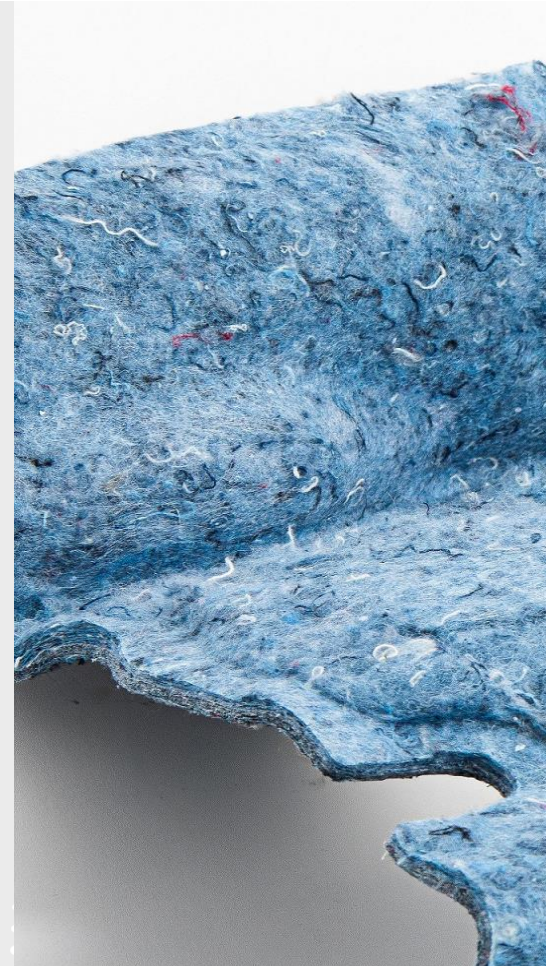
Flexi-Loft

Application

- Inner dashes
- Carpets

Advantages

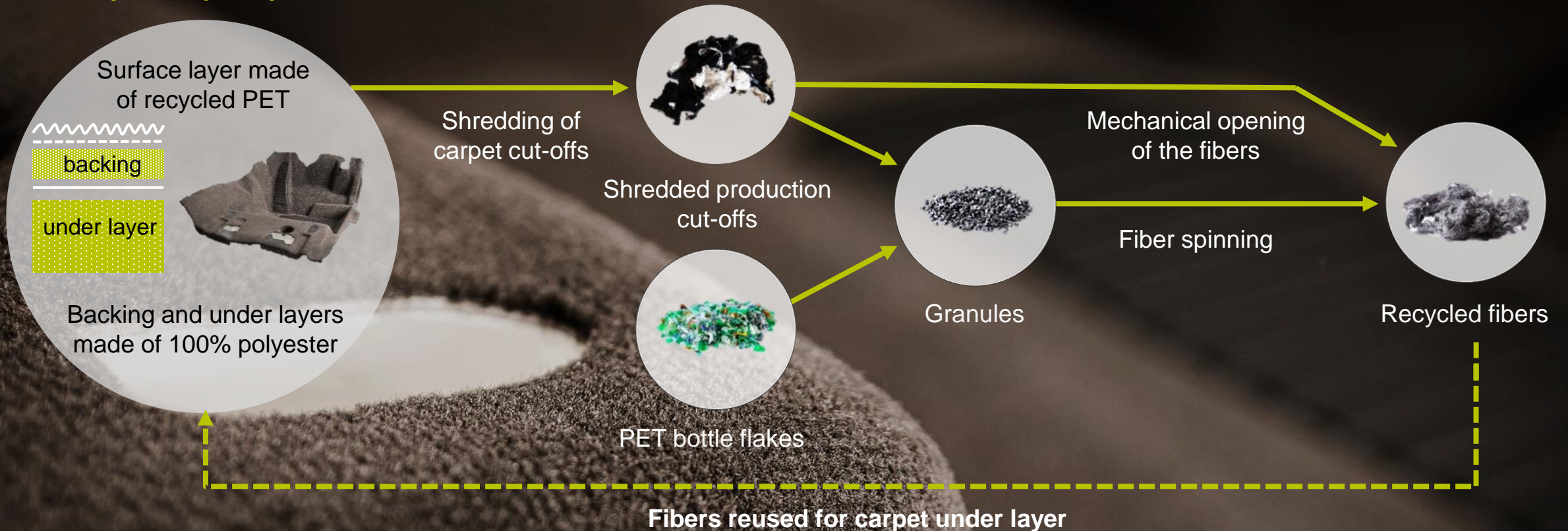
- Unique fiber blend increases sustainability geometrical adaptability of components
- Felt-based material made from at least 50% recycled cotton fibers
- Lightweight, versatile and sound-absorbing



Selected innovations

Fully recyclable carpet systems made of 100% polyester

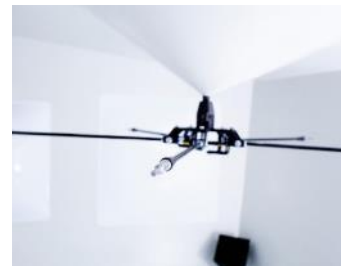
Multilayer carpet system



50 years of cutting-edge technology

Measurement systems

autoneum



Autoneum is leading provider of measurement systems for vehicle acoustics



Innovative systems for measuring NVH (noise, vibration, harshness) behavior



Global industry standard

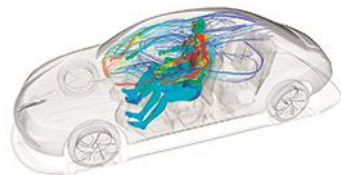
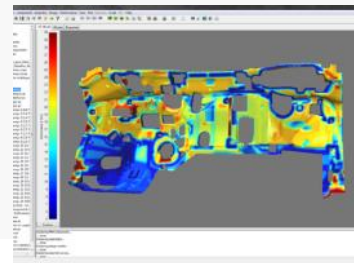
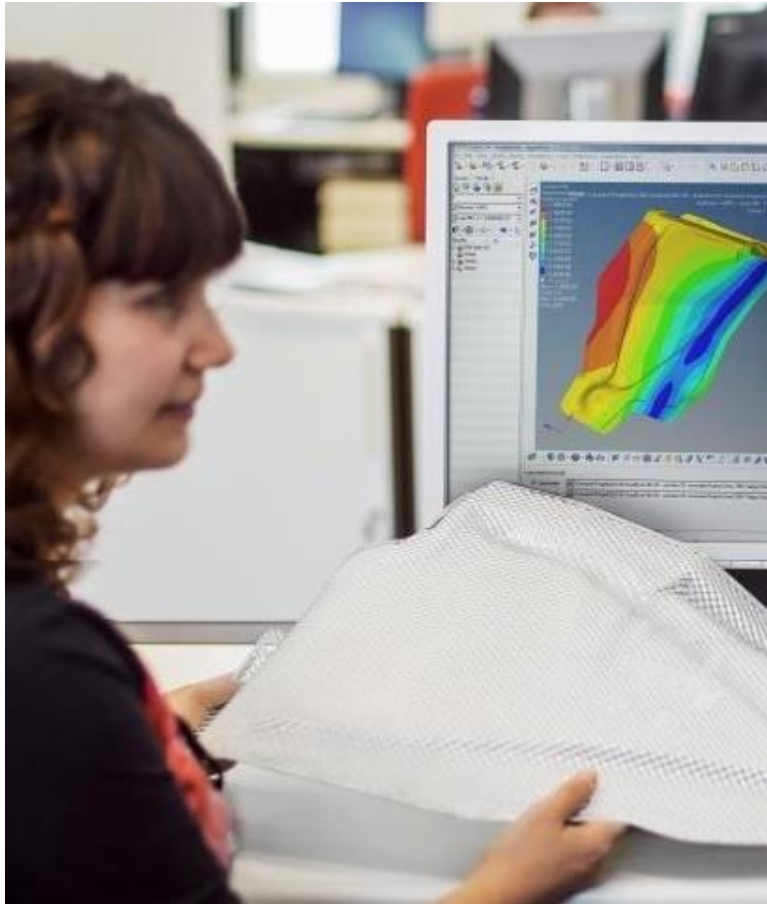


Used by automotive manufacturers, suppliers and laboratories

Software for component optimization

Simulation

autoneum



Acoustic Garage – first online configurator around noise protection in vehicles (acoustics.autoneum.com)



Programs developed in-house for optimizing vehicle NVH behavior



“Best in class” solutions for vehicle development and production



Tailored for vehicle manufacturers' individual requirements

Agenda

1. **About Autoneum**
2. **Results Full-Year 2022**
3. **Acquisition of Borgers Automotive**
4. **Outlook**
5. **Technology trends**
6. **Corporate Responsibility**

Sustainability in focus

Challenges and opportunities

Growing requirements from society, market and customers:

- Global fight against climate change and environmental pollution
- Targeted net zero emissions by 2050 (Paris Climate Agreement)
- Reduction of Scope 1, 2 and 3 emissions
- OEM sustainability targets to drive supplier actions:
 - Lower CO₂ emissions
 - Circular production processes
 - Reduce waste, water and energy consumption



Advance Sustainability Strategy




Key achievements in 2022

autoneum

With its **Advance Sustainability Strategy 2025**, Autoneum has defined an ambitious set of environmental, social and ethical targets.



214 eco-efficiency projects:

-  Waste reduction
-  Energy consumption
-  Water usage



Launch of the **Autoneum Women's Network** to foster a culture of Diversity & Inclusion

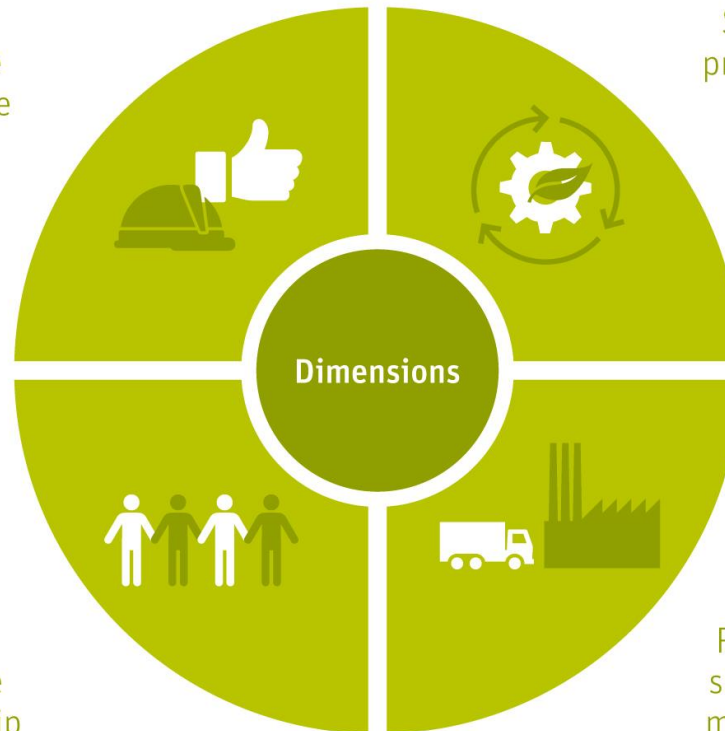


67
community projects
implemented globally

Ambitious targets in four dimensions

- Health & safety
- Fair working conditions
- Employee development
- Employee well-being
- Diversity & Inclusion

Fair and
attractive
workplace



Sustainable
products and
production
processes

- Sustainable innovations
- Eco-efficient processes
- Waste reduction & recycling
- Energy management
- Emission reduction

- Ethical business conduct
- Compliance
- Fair competition
- Corruption prevention
- Community engagement

Good
corporate
citizenship

Responsible
supply chain
management

- Human rights
- Labor rights
- Environmental protection
- Business ethics
- Material compliance

Vision 2027: Sustainable products & production processes



Continuous focus on

Sustainable innovations

Material waste reduction & increase of recycling capacities

Reduction of emissions, energy and water consumption

Building a culture of environmental sustainability

Impact and key levers for improvement

CO₂ emissions, waste and water

Sources of CO₂ emissions according to Greenhouse Gas Protocol



Scope 1 ~ 5%
Direct emissions from company-owned and controlled resources
Levers: steam loss, thermal insulation



Scope 2 ~ 10%
Indirect emissions from the generation of energy purchased from a utility provider
Levers: compressed air, lighting, renewable energy



Scope 3 ~ 85%
Indirect emissions in the value chain of the reporting company (upstream and downstream)
Levers: supply chain, transport, waste



Revised environmental operational targets 2027

Reduce Scope 1 & 2 emissions by **20%**

Increase the share of renewable electricity to **25%**

Reduce Scope 3 emissions from purchased goods and services by **20%**

Reduce total non-hazardous waste volume by **40%**

Reduce water consumption by **10%**

Sustainability label for products

Technologies with an excellent environmental performance throughout the entire product life cycle.



Partially or entirely made of recycled materials



Production cut-offs are reclaimed, processed and reused again



Significantly lighter than comparable standard components



Recyclable



Sustainability champions



Ultra-Silent

- Made of 100% PET with up to 70% recycled fibers
- 50% lighter than equivalent plastic parts
- Mono-material and fully recyclable
- Use: underbody systems and frunks



Relive-1

- Carpet yarns consisting of up to 97% recycled PET
- More robust and dirt-repellent than standard carpets
- PET cut-offs can be fully reclaimed and reused
- Use: tufted carpets



Prime-Light

- Made of more than 50% recycled cotton fibers
- Saves 7 kg of weight on a typical car
- Fully recyclable
- Use: inner dashes and floor insulators



Hybrid-Acoustics PET

- Made of 100% PET with up to 50% recycled fibers
- 40% lighter than alternative insulation products
- Mono-material and fully recyclable
- Use: e-motor encapsulations

Sustainability champions



Di-Light

- Made of up to 97% recycled PET
- 20% lighter than conventional needlepunch carpets
- Mono-material and fully recyclable
- Use: non-woven carpets



Mono-Liner

- Made of 100% PET with up to 70% recycled fibers
- Up to 50% lighter than corresponding plastic components
- Mono-material and fully recyclable
- Use: wheelhouse outer liners



IFP-R2

- Contains up to 80% recycled fibers depending on composition
- Significant weight saving compared to conventional solutions
- Fully recyclable
- Use: inner dashes and floor insulators

Contacts and Event Calendar

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The vehicle production figures for 2022 and forward looking are based on the latest estimates of S&P Global Mobility.

Autoneum. Mastering sound and heat.

