



# DRIVING INNOVATION, SHAPING A SUSTAINABLE FUTURE.

FOR GROWTH THAT MATTERS

MARCH 2026

**ANDRITZ**

# WHAT WE DO



Pioneer in delivering large-scale industrial technology solutions

Developing large-scale, state-of-the-art engineering and service solutions



Elevating customer operations with advanced technologies



Ensuring long-term asset performance through lifecycle services



Enabling customers to decarbonize and transform their operations at scale

# KEY FINANCIAL FIGURES 2025



Strong order intake and stable profitability

ORDER INTAKE

**8.9 billion EUR**

(2024: 8.3 billion EUR / +8%)

REVENUE

**7.9 billion EUR**

(2024: 8.3 billion EUR / -5%)

ORDER BACKLOG

**10.5 billion EUR**

(2024: 9.7 billion EUR / +7%)

Comparable EBITA |

Comparable EBITA MARGIN

**698 MEUR | 8.9%**

(2024: 743 MEUR / -6% | 8.9%)

EBITA | EBITA MARGIN

**648 MEUR | 8.2%**

(2024: 713 MEUR / -9% | 8.6%)

NET INCOME

incl. non-controlling interests

**457 MEUR**

(2024: 497 MEUR / -8%)

# WORLD MARKET LEADER WITH FOUR BUSINESS AREAS



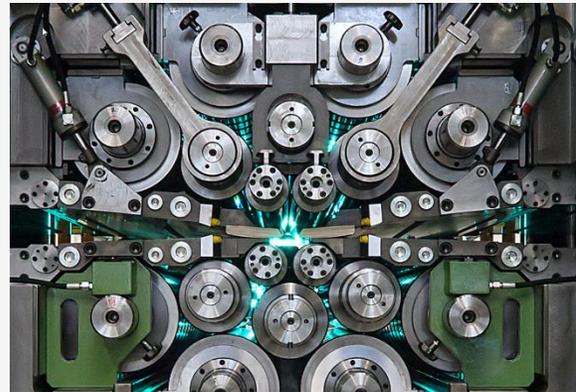
## PULP & PAPER



38%\*

Pulp: #1  
Paper: #3

## METALS



21%\*

Forming: #1  
Processing: #1-2

## HYDROPOWER



22%\*

#1-2

## ENVIRONMENT & ENERGY



19%\*

#1-3

\* Share of total group revenue 2025

# Global market position, estimated by ANDRITZ

# CLOSE TO OUR CUSTOMERS



# COMPETENCE, COMMITMENT, PASSION – THE WHOLE TEAM STANDS FOR OUR SUCCESS



**+30,000**  
employees

64% white-collar and  
36% blue-collar

Over 32% of employees  
work in engineering,  
technology, or project  
management.



# 174 YEARS



## Journey from a foundry to global technology leadership

<b>1852</b>	<b>1922</b>	<b>1948</b>	<b>1951</b>	<b>1997</b>	<b>2000</b>	<b>2001</b>	<b>2006</b>	<b>2013</b>	<b>2018</b>	<b>2022</b>
Established by Josef Körösi as a foundry and machine works	Foundation of ANDRITZ apprentice workshop	Expansion into big turbines (Escher-Wyss)	Start of manufacturing of complete paper machines	Foundation of ANDRITZ China	Pulp technology (Ahlström Machinery)	Foundation of ANDRITZ Brazil	Hydropower (VA TECH Hydro)	Advanced metals technology (Schuler Group)	Fabrics and Rolls (Xerium Technologies)	Battery production (Sovema)
										

### OWNERSHIP

<b>1852</b>	<b>1900</b>	<b>1938-1949</b>	<b>1950</b>	<b>1987</b>	<b>1999</b>	<b>2001</b>	<b>2003</b>	<b>2026</b>
▼	▼	▼	▼	▼	▼	▼	▼	▼
Established by Josef Körösi	Gutmann Group	Expropriation	Creditanstalt-Bankverein	AGIV AG	Financial investors and the Custos private foundation	IPO – Listing on the Vienna Stock Exchange	 Wolfgang Leitner, former CEO of ANDRITZ	Custos private foundation increased its stake to 30%
								25 years listed on the Vienna Stock Exchange

# WE EXPAND OUR PORTFOLIO IN ALL BUSINESS AREAS



## Acquisitions by business area since 2005

### PULP & PAPER

2005	Cybermetrics	2018	Novimpianti
2005	Universal Dynamics Group	2018	Diatec
2006	Küstern	2018	Xerium
2006	Carbona	2019	Kempulp
2006	Pilão	2020	Enviroburners
2007	Bachofen + Meier	2021	Laroche
2007	Sindus	2022	Bonetti Group
2008	Kufferath	2022	ĐURO ĐAKOVIĆ TEP
2009	Rollteck	2023	Dan-Web
2010	Rieter Perfojet	2023	SciTech Service
2010	DMT/Biax	2023	Imagine That Inc.
2011	AE&E Austria (Boiler)	2024	NAF
2011	Iggesund Tools	2024	Procemex
2011	Tristar Industries	2024	PulpEye
2011	Asselin-Thibeau	2024	ATN Engineering
2012	AES	2025	A.Celli Paper
2013	MeWa	2025	Diamond Power
2016	SHW CastingTech	2025	Allen-Shermann-Hoff
2017	Paperchine	2025	Parts of Wehrle

### METALS

2005	Lynson
2008	Maerz
2012	Bricmont
2012	Soutec
2013	Schuler
2013	FBB Engineering
2014	Herr-Voss Stamco
2016	Yadon
2016	AWEBA
2018	Farina Presse
2018	ASKO
2022	Sovema Group
2024	Wuhan Arrows Creation
2024	INTEA
2025	Salico Group
2025	Sanzheng

### HYDROPOWER

2006	VA TECH HYDRO
2007	Tigép
2008	GE Hydro business
2010	GEHI (JV)
2010	Precision Machine
2010	Hammerfest Strøm
2011	Hemicycle Controls
2018	HMI

### ENVIRONMENT & ENERGY

2005	Lenser Filtration
2006	CONTEC Decanter
2009	Delkor Capital Equipment
2010	KMPT
2010	Ritz
2011	AE&E Austria (Clean Air Technologies)
2012	Gouda
2013	Shende Machinery
2015	Euroslot
2016	ANBO
2021	GE Steam Power
2022	J. Parpala
2023	Dedert
2025	LDX Solutions



# OUR STRATEGY: LONG-TERM PROFITABLE GROWTH



**DECARBONIZATION**



**DIGITALIZATION**



**CUSTOMER SERVICE**

## LONG-TERM PROFITABLE GROWTH

- Grow revenue
- Grow profitability
- Grow service share





# DECARBONIZATION: WE ENABLE THE GREEN TRANSITION

- Developing economically viable key technologies for the green transition
- Providing full lifecycle services from project development to operation and maintenance
- Offering solutions for
  - carbon capture
  - production of green hydrogen
  - production of renewable fuels
  - battery production for e-mobility
  - textile recycling



# DIGITALIZATION: SUPPORTING CUSTOMERS THROUGHOUT PLANT LIFE CYCLE



## PROCESS OPTIMIZATION



Maximize plant process performance

## PLANT MANAGEMENT



Maximize the value of data – from raw data to plant insights

## ASSET OPTIMIZATION



Maximize productivity, efficiency, and availability for all assets

## CYBER SECURITY



Proactively manage digital security risks

## TRAINING



Boost customer expertise and reduce risk to people, plant, and investment

# CUSTOMER SERVICE: SUCCESS THROUGH OUR LIFE CYCLE SOLUTIONS



Around **10,000**  
service employees

In more than **180**  
locations worldwide



# INDUSTRIAL-SCALE GREEN HYDROGEN FOR GREEN STEEL MAKING



First step in  
**SALCOS®**  
transformation  
program

**200,000 t**  
CO<sub>2</sub> reduction per year

ANDRITZ delivers a green hydrogen plant to Salzgitter Flachstahl GmbH, Germany.



**100 MW**  
alkaline  
electrolyzer  
capacity  
Start-up: 2027  
Project status:  
in execution

**9,000 t/y**  
green hydrogen



**SALZGITTER  
FLACHSTAHL**  
Ein Unternehmen der Salzgitter Gruppe

# INDUSTRIAL CARBON CAPTURE PLANTS FOR HARD-TO-ABATE INDUSTRIES



**In operation  
since 2022**

**2 t/day**

**food grade CO<sub>2</sub>  
for industrial reuse**

Rohrdorfer, Germany



**Germany's  
first  
industrial  
carbon  
capture plant  
in the cement  
industry**

**Fully automated,  
continuous operation**

# 1.5-GIGAWATT BATTERY CELL FORMATION LINE



**Production start: 2026**

**Industrial-scale, fully automated battery cell formation line**

Leading battery producer in southern Germany



**Booster batteries for a renowned German car manufacturer**

**Designed for fast and energy-efficient charge-discharge cycles**

# INDUSTRIAL-SCALE TEXTILE RECYCLING – AUTOMATED SORTING



**Foundation  
for fiber-to-  
fiber  
recycling**

**Automated sorting of  
post-consumer textiles**  
Capacity: 5,000 t/y  
Start-up: 2023

Nouvelles Fibres Textiles,  
France



**AI-based  
material and  
color  
identification**

**Contaminant removal  
enabling high-purity  
recycling streams**

# NUMBER ONE RENEWABLE ENERGY SOURCE TO POWER THE GREEN TRANSITION

In full  
operation  
since 2023

## 8,600+ GWh

Enough annual energy for  
about eight million households



Laúca, Angola:  
Largest hydroelectric  
power plant in Angola

Backbone of  
modern grid  
regulation in  
Angola

Total capacity: 2,070 MW  
6x 338 MW main, 1x 42 MW eco

# REDEFINING THE FUTURE: UNLEASHING OUR INNOVATION ENGINE



~ 3%

of revenue invested  
in R&D in 2025



451

new patent  
applications in 2025



6,270

patent  
protection rights

## FOCUS AREAS

### **Decarbonization:**

Supporting customers in reducing emissions and advancing sustainability goals

### **Digitalization:**

Using advanced technologies to increase productivity, reduce costs, and improve process performance

### **Energy and material efficiency:**

Improving resource efficiency across industrial processes and value chains





# OUR PERFORMANCE IS EXTERNALLY RECOGNIZED

We achieved Gold in EcoVadis and Prime in ISS ESG. Our climate targets are validated by the SBTi.

<p>GOLD TOP 5%</p> 	<p>RATING PRIME</p> 	<p>RATING ESG SCORE 53</p> 
<p>RATING MEDIUM RISK (9/2025: SCORE 20.5)</p> 	<p>RATING BBB</p> 	<p>RATING B</p> 



SCIENCE  
BASED  
TARGETS

DRIVING AMBITIOUS CORPORATE CLIMATE ACTION

ANDRITZ commits to reduce absolute Scope 1 and Scope 2 GHG emissions by 42% by 2030 from a 2023 base year. ANDRITZ also commits to reduce absolute Scope 3 GHG emissions by 25% by 2030 from a 2023 base year.

# THE MAJORITY OF OUR 2025 TARGETS WERE MET – SEVERAL OF THEM EVEN AHEAD OF SCHEDULE



(Status at the end of 2025)

ENVIRONMENT	
	<p><b>47%</b> share of revenue from sustainable solutions and products**</p> <p>2025 target: &gt;50%</p>
	<p><b>59%</b> reduction in greenhouse gas emissions (Scope 1+2)</p> <p>2025 target: 50%* ✓</p>
	<p><b>16%</b> reduction in water consumption</p> <p>2025 target: 10%* ✓ Revised 2025 target: 18%***</p>
	<p><b>37%</b> reduction in waste volume</p> <p>2025 target: 10%* ✓ Revised 2025 target: 40%***</p>

SOCIAL	
	<p><b>45%</b> reduction in the annual injury frequency rate (&gt;1 day of absence) y/y</p> <p>y/y target: 30% ✓</p>
	<p><b>17.4%</b> share of women in the workforce</p> <p>2025 target: 20%</p>
	<p><b>4.0%</b> annual fluctuation rate due to voluntary resignations</p> <p>2025 target: &lt;4.5% ✓</p>

GOVERNANCE	
	<p><b>90.4%</b> procurement volume covered by assessed suppliers</p> <p>2025 target: 85% ✓</p>
	<p><b>0</b> no infringements, achieved by implementing the highest corporate compliance standards</p> <p>y/y target: 0 ✓</p>
	<p><b>0</b> no event-driven profit warnings, achieved by detecting company risks at an early stage</p> <p>y/y target: 0 ✓</p>

# OUR NEW SUSTAINABILITY PROGRAM 2026-2030



Shaping a more sustainable future with our ESG commitment and new KPIs



 ENVIRONMENT

**Enabling the green transition**

We provide INNOVATIVE, RESOURCE-EFFICIENT solutions for our customers and reduce the environmental footprint of our own operations.

 SOCIAL

**Supporting people to grow**

We create a SAFE AND FAIR work environment that promotes equal opportunities and personal development.

 GOVERNANCE

**Governing with integrity**

We uphold HIGH ETHICAL STANDARDS and responsible business practices across our operations and value chain.



# TRACKING OUR ESG COMMITMENT THROUGH THE 2030 KPIs



Base year 2023

<b>ENVIRONMENT</b>		E-impact revenue	GHG emissions, absolute (SBTi)	GHG emissions, relative	Water use in water-stressed areas*	Waste to landfill
		<b>&gt; 50%</b>	Own operations <b>-42%</b> Value chain <b>-25%</b>	Own operations <b>18 → 10 t/MEUR</b>	<b>-25%</b>	<b>-25%</b>
		<hr/>				
		<hr/>				
<b>SOCIAL</b>		LTIFR	Women in people leadership positions	Voluntary employee turnover	Employee engagement index	<p>* Water-stressed areas as defined in WRI Aqueduct</p> <p>** Total external purchasing volume from suppliers with an annual spend exceeding 250,000 EUR in the past two years, and from new suppliers with spend exceeding 25,000 EUR in the current year</p>
		<b>&lt; 1</b>	<b>&gt; 15%</b>	<b>&lt; 4%</b>	<b>&gt; 75</b>	
<b>GOVERNANCE</b>		Supplier prequalification**	Supplier social audits	Sustainability-rated suppliers***	Certified sustainability management index****	<p>*** External ESG rating integrated into Supply Chain IT tools</p> <p>**** Index covers key sustainability-related ISO standards for environment, energy, OHS, quality, and compliance management</p>
		<b>&gt; 90%</b>	<b>&gt; 100</b> in total	<b>20,000</b> suppliers rated by third party	<b>100</b> of the set 2030 target	

# OUR GOAL IS ZERO OCCUPATIONAL INJURIES AND ILLNESSES

We continuously strengthen workplace safety across all operations:

- A safe, healthy, and supportive working environment is provided for everyone involved in our projects.
- All employees operate under ISO 45001-certified safety management systems.
- LTIFR\* improved from 9.18 (2016) to 1.19 (2025) through systematic safety improvements.



Committed to  
**NO HARM**

\*LTIFR = Number of injuries causing more than one day of absence per one million working hours

# Creating Growth that Matters





# FLAT PRODUCT PROCESSING

ANDRITZ METALS

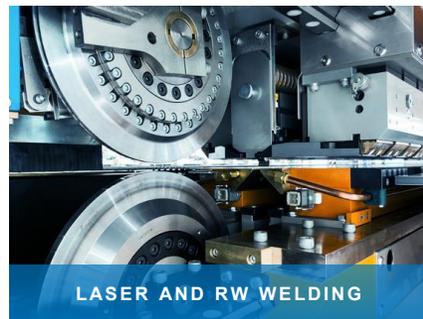
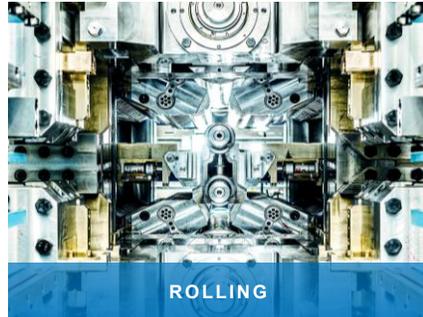
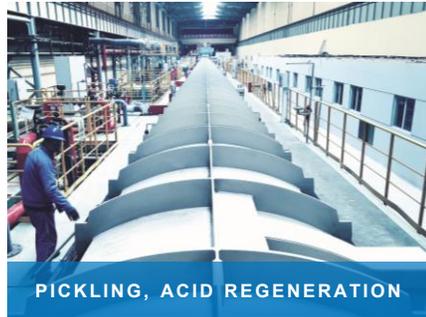
March 2026

**ANDRITZ**

# ANDRITZ METALS



Carbon and stainless steel, aluminum and copper



# FUNDAMENTALS OF OUR EXCELLENCE



ANDRITZ

Soutec AG  
Schuler AG  
Selas France SA  
Thermtec  
FBB GmbH  
Salico  
Lynson  
United Utilities  
ASKO  
Sundwiger Eisenhütte Maschinenfabrik  
Herr-Voss Stamco  
MAERZ-Gautschi Industrieofenanlagen GmbH  
Davy-Swindell  
Otto Kaiser GmbH  
HITEQ  
Ruthner AG  
Bricmont Inc.  
Sanzheng  
Nisterhammer

# ANDRITZ METALS CAPABILITIES



FINDING SOLUTIONS TO ANY CHALLENGE!

A reliable partner for the production and processing of stainless steel, carbon steel and non-ferrous metals with strong focus on

- Health, Safety and Environment
- Sustainability
- Research and development
- Project and site management
- Manufacturing and engineering
- Automation and digitalization
- Life-cycle full service



# ANDRITZ METALS HEALTH, SAFETY AND ENVIRONMENT



- All locations of ANDRITZ Metals are already part of matrix certification, for the integrated QHSE Management System acc. to ISO 9001, ISO 14001 and ISO 45001.



# ANDRITZ METALS

## HEALTH, SAFETY AND ENVIRONMENT



- When it comes to workplace safety, our goal is simple – **we do not want injuries or accidents at any time**
- **Safety begins with each individual employee.** We never take risks that could endanger ourselves or others during our jobs
- **We strive to eliminate accidents in all of our facilities** by ensuring a safe and healthy work environment and by looking for ways to continuously improve
- We comply with all safety laws and believe that **safety comes before anything else**



# ANDRITZ METALS “SAFETY FIRST” PROGRAM



ANDRITZ "Safety First" program implemented at site

- Strong cooperation between all contractors at site
- High management commitment
- Strict control of site works to increase installation quality, safety and health of on-site staff
- Permanent high management compliance workgroup
- Extremely good safety numbers during the projects



# SUSTAINABILITY - VISION

Sustainability is the main driver for innovation.

## Strategic Focus:

- CO<sub>2</sub> emission reduction
- NO<sub>x</sub> reduction
- Digitalization



Sustainability and customer focused service and technology leader for flat product processing

**smarter  
cleaner  
greener**

# ANDRITZ METALS RESEARCH AND DEVELOPMENT



Our innovation portfolio is based on the following focus areas:

- Environmentally sustainable production, circular economy: solutions for recycling waste acid and waste water, reducing CO<sub>2</sub> and NO<sub>x</sub> emission and contributing to a toxic free environment
- Lightweight material for the automotive industry: new process technologies to produce also future generations of AHSS, TWBs and aluminum grades
- Digitalization: We combine domain know-how with automation and digitalization expertise! The four main pillars are increase asset value, increase product quality, improve production performance and secure sustainable production.



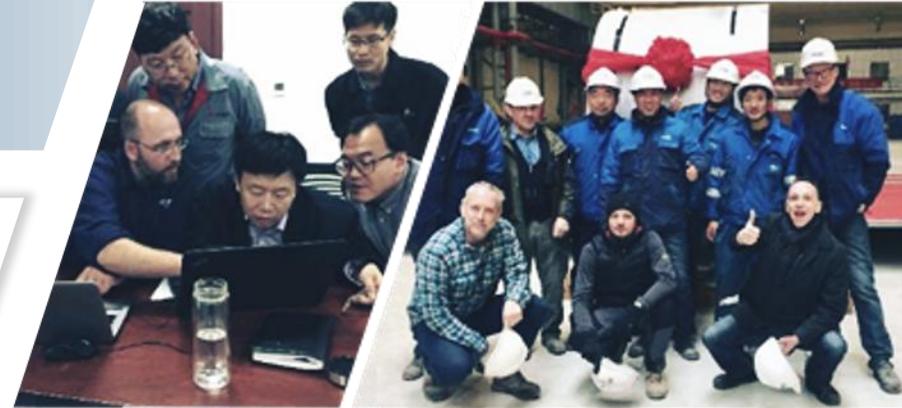
7 R&D centers in Europe and USA

# ANDRITZ METALS PROJECT AND SITE MANAGEMENT



## PROJECT MANAGEMENT

- Project set up with interdisciplinary international teams led by experienced project managers
- Coordination of design engineering and interfaces with customer and suppliers
- Effective communication with all involved parties and project stakeholders
- Professional document management
- Time scheduling and progress reporting for on-time delivery
- Efficient installation, commissioning and start-up



# ANDRITZ METALS PROJECT AND SITE MANAGEMENT



## SITE MANAGEMENT

- Wide range of site jobs ranging from very small field service orders to large scale full installation contracts
- Most capital contracts include:
  - Only supervision service
  - Installation in customer scope
- Couple of full installation / EPC contracts
- Typical large capital project:
  - Approx. 5000 SV man-days
  - Approx. MEUR 10-20 installation costs
- 100 specialized site supervisors globally



# ANDRITZ METALS MANUFACTURING AND ENGINEERING



## BENEFIT FROM OUR MANUFACTURING CAPABILITIES!

- Consistent technological development
- Consistent improvement of reliability
- Quality
- Service (upgrades, rebuilds, spare & wear parts)

## STRATEGY

- Production of key components
- High- and consistent quality due to ANDRITZ manufacturing standard
- Excellent in engineering, design and planning



# ANDRITZ METALS AUTOMATION



THE RIGHT CLICK FOR YOUR PLANT!

Functional, reliable and safety Electric and Automation systems from in-house automation know-how combined with expertise in process and mechanical design.

- Complete automation solutions from one source
- State of the art and consistent
- Short start-up times
- Smooth operations of ANDRITZ plants and technologies
- Supported by simulation models, digital twins, advanced process control technologies, and special sensors.
- Comprehensive lifetime services
- Global services network
- **Industry 4.0 READY**





# ANDRITZ METALS AUTOMATION

LEVEL 3 (ERP)



LEVEL 2  
(MES/AFC)



LEVEL 1  
(PLC/OCS)



LEVEL 0  
(Field)



# ENGINEERED SUCCESS FOR FLAT PRODUCT PROCESSING

ANDRITZ combines domain know-how with automation and digitalization expertise!

## Domain know-how

150+ years experience with more than 1040 processing lines, 342 rolling mills, 330 furnaces in the carbon steel, stainless steel, aluminum, welding and stamping industry.



## Automation

Integrated technology solutions for our domain products with more than 35 years of experience in using automation software independent of the automation hardware supplier, e.g. Siemens, ABB, Rockwell, Yokogawa, and many more.



## Digitalization

Metis UX platform with more than 50 apps for optimizing the quality and performance of our customers production with more than 50 reference



# INTELLIGENT FLAT PRODUCT PROCESSING

For a world-class, flat steel producer who delivers the product exactly as requested, on time and with consistent quality

## Increase asset value



- Risk-based maintenance
- Condition monitoring
- Anomaly detection
- Process change tracking
- Logbook
- Digital twin

**Increase asset availability by up to 25%**

> 50 references, thereof  
> 15 in Metals

## Increase product quality



- Intelligent CGL
- Coil quality mgmt.
- Data analytics
- Advanced furnace control
- Process model (picking, annealing)
- Intelligent rolling mill optimization
- Control performance assessment (CPA)

**Minimize yield losses by up to 5%**

> 60 references, thereof  
> 45 in Metals

## Improve production performance



- Manufacturing execution system (MES)
- Overall equipment efficiency (OEE)
- Cost/resource management
- Statistical process control (SPC)
- Plant floor management
- Alarm management
- Control performance assessment (CPA)
- Production information (PID)

**Increase production output by up to 15%**

> 40 references, thereof  
> 20 in Metals

## Secure sustainable production



- Utility and energy consumption
- Emission reduction (CO<sub>2</sub>, NO<sub>x</sub>)
- Intelligent acid management
- Cyber security

**CO<sub>2</sub> reduction by up to 25%**

> 30 references, thereof  
> 15 in Metals

# ANDRITZ METALS LIFE CYCLE FULL SERVICE

## SERVICE ABILITY

- Outstanding service product portfolio - from spare parts to mill-wide maintenance outsourcing agreements
- Close cooperation with the mill's and service center operation and maintenance personnel
- Contribute to improved reliability, availability, and production while reducing overall operating costs

## Service products and solutions

- Automation & control
- Engineered wear products
- Mill improvement
- Studies & field services
- Mill maintenance
- Remote Assistance
- Spare & replacement parts
- Upgrades & modernizations
- Rebuild & Retrofits
- Tooling



# ANDRITZ METALS WORLDWIDE



**1,400**  
EMPLOYEES

**150+**  
YEARS  
EXPERIENCE

**6**  
INNOVATION  
CENTERS

**400**  
EMPLOYEES  
IN SERVICE



# ANDRITZ METALS NEWS



2026/02/18

## ANDRITZ to supply precision cold rolling mill for titanium processing in China

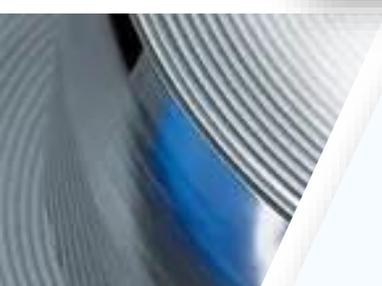
A leading company in China's titanium industry has placed an order with international technology group ANDRITZ for a precision 20-high reversing cold rolling mill. [Read more](#)



2026/01/16

## ANDRITZ acquires induction heating specialist Sanzheng

International technology group ANDRITZ has acquired a 51% stake in Baoding Sanzheng Electrical Equipment Co., Ltd., a China-based provider of advanced industrial induction heating systems. [Read more](#)



2025/12/09

## Tata Steel awards ANDRITZ order for acid regeneration plant

Tata Steel has awarded international technology group ANDRITZ an order to supply an acid regeneration plant for its steel production facility at Port Talbot Works, Wales, UK. [Read more](#)

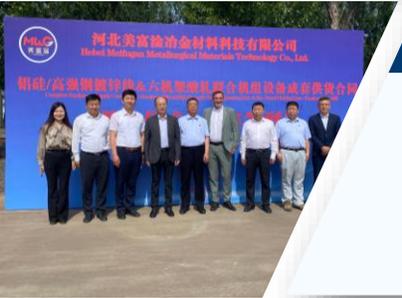
# ANDRITZ METALS NEWS



2025/11/12

**Henan Mingtai, China, places two orders with ANDRITZ in the aluminum furnace sector**

Henan Mingtai Aluminum Industrial Co., Ltd. has awarded two orders to international technology group ANDRITZ. [Read more](#)



2025/07/17

**CERI Technology Company awards annealing furnace contract to ANDRITZ**

CERI Technology Company Limited has awarded a contract to international technology group ANDRITZ to supply an annealing furnace for a continuous galvanizing line for Hebei MFG Metallurgical Materials Technology Co., Ltd.. [Read more](#)



2025/07/10

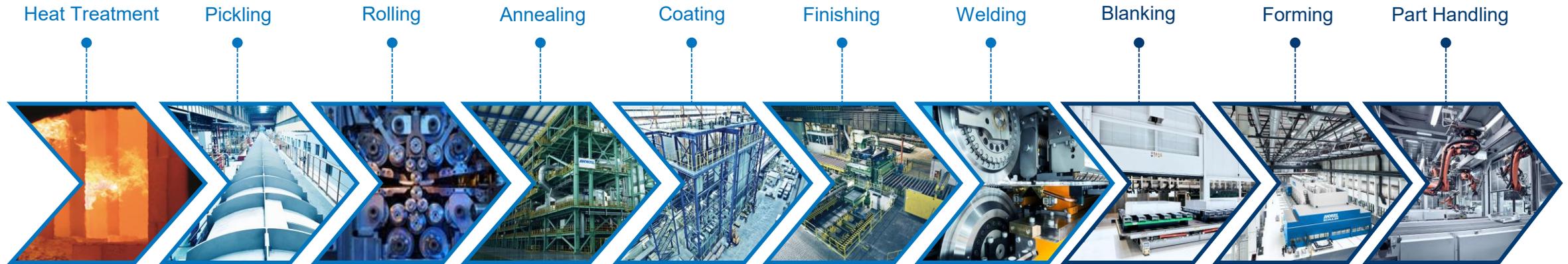
**ArcelorMittal/China Oriental Group JV orders high-end silicon steel processing plant from ANDRITZ**

The joint venture between ArcelorMittal and China Oriental Group has selected international technology group ANDRITZ to supply silicon steel processing lines and a rolling mill for a major project in Changzhou, Jiangsu Province, China. [Read more](#)



# ANDRITZ METALS

Entire process chain from hot rolled strip to finished parts



## Metals Processing core competences

Processing lines steel and aluminum strips, industrial furnace systems, and welding systems

## Metals Forming core competences

Press shop solutions



**ANDRITZ.  
FOR GROWTH  
THAT MATTERS.**

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