

# AUSTRIAN POST Investor Presentation

August 2025





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## 1. Highlights and Overview



2. Strategy Implementation
3. Group Results H1 2025
4. Outlook 2025

# AUSTRIAN POST AT A GLANCE



## Mail

- Letter Mail
- Direct Mail
- Newspapers & Magazines

**Revenue 2024:**  
EUR 1,240m



## Parcel & Logistics

- Parcels & Express
- Fulfilment & Cash Transport
- E-Commerce Services

**Revenue 2024:**  
EUR 1,713m



## Retail & Bank

- Branch & Financial Services
- Customer Services

**Revenue 2024:**  
EUR 202m



## Group

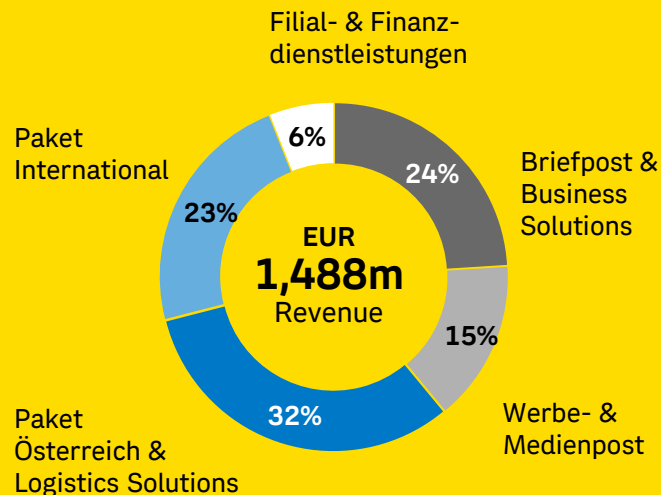
**Revenue 2024:** EUR 3,123m

**EBITDA 2024:** EUR 423m

**EBIT 2024:** EUR 207m

## Revenue mix H1 2025

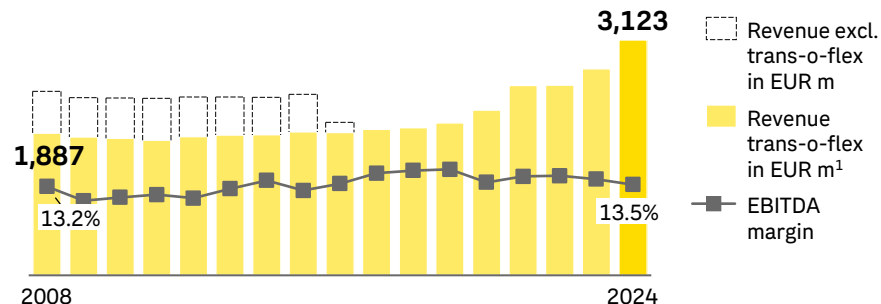
Parcel share at 55% of product mix



# CONTINUATION OF CLEAR CAPITAL MARKET POSITIONING

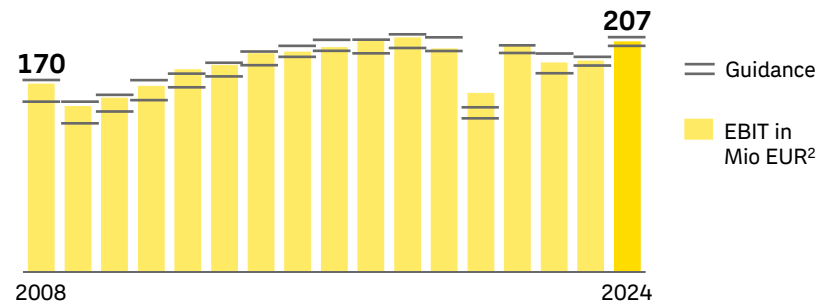


## 1 Profitable growth business model



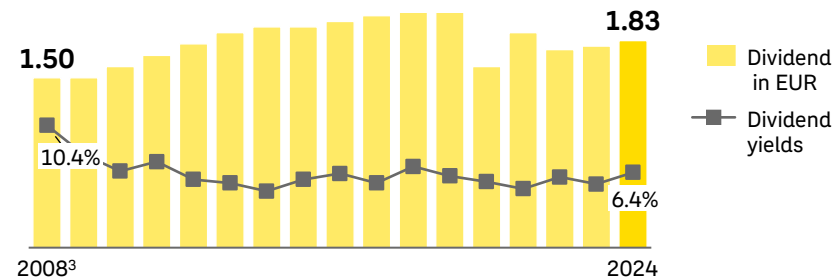
<sup>1</sup> 2014: Adjusted reporting of revenue

## 2 Reliability ("Promise & Deliver")



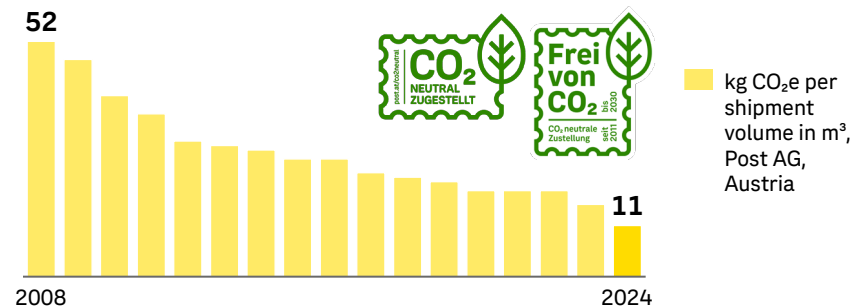
<sup>2</sup> 2015: EBIT adjusted for special effects

## 3 Attractive dividend policy

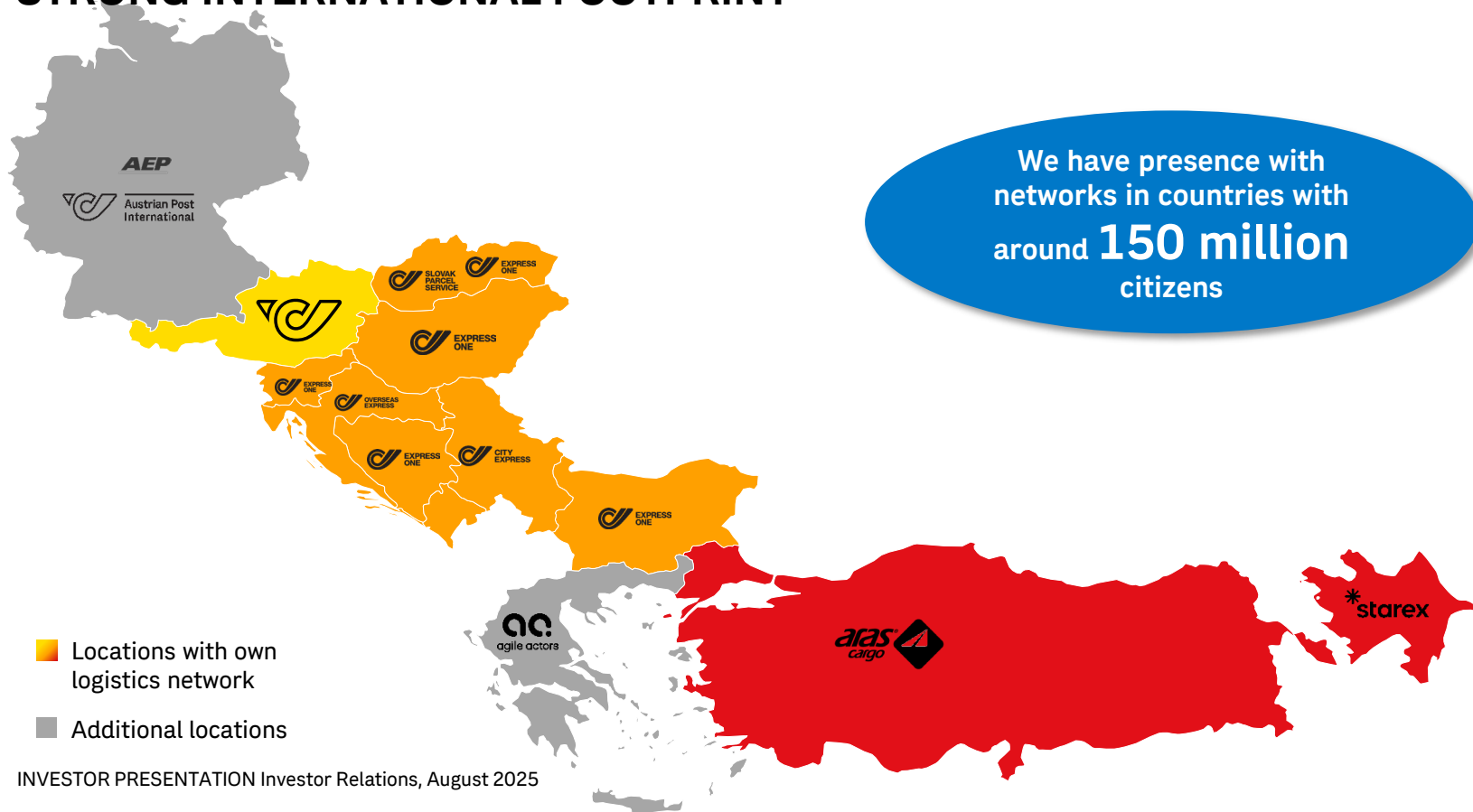


<sup>3</sup> excl. EUR 1.00 special dividend

## 4 Decarbonisation of logistics



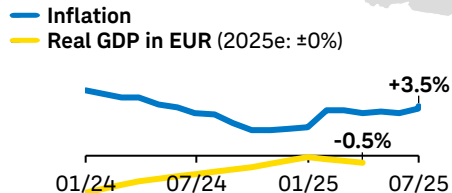
# STRONG INTERNATIONAL FOOTPRINT



# DIFFICULT ECONOMIC ENVIRONMENT IN THE GLOBAL POSTAL MARKET

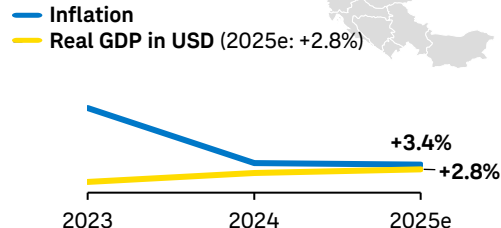


## Austria



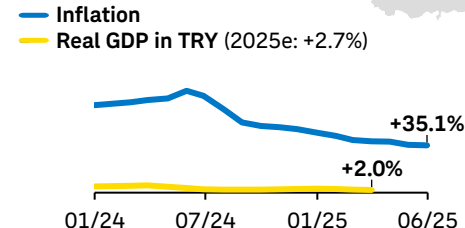
Source: Statistics Austria (Status: August 2025), Basis 2015=100, ACB (Status June 2025), estimate 2025e: WIFO (Status: June 2025)

## CEE/SEE



Source: IMF (July 2025), USD adjusted purchasing power)

## Türkiye



Source Central Bank of the Republic of Türkiye (Status: July 2025), Basis 2003=100, IMF (Status: July 2025), Turkish Statistical Institute (Status July 2025), estimate 2025e: IMF (July 2025)

- Further digitalisation initiatives at important customer groups (banks, insurance, telecom)
- Cost pressure in the public sector (federal government, provinces, municipalities)
- Market consolidation in stationary trade
- Restrained investment climate and lower corporate advertising expenditures



**Further decline in letter and direct mail volumes**

- International trade conflicts leading to uncertainty and investment restraint
- Changed purchasing power and consumer behaviour
- Increasing market concentration of major e-commerce players
- Insourcing ambitions of international e-commerce platforms



**Subdued growth in parcel volumes**

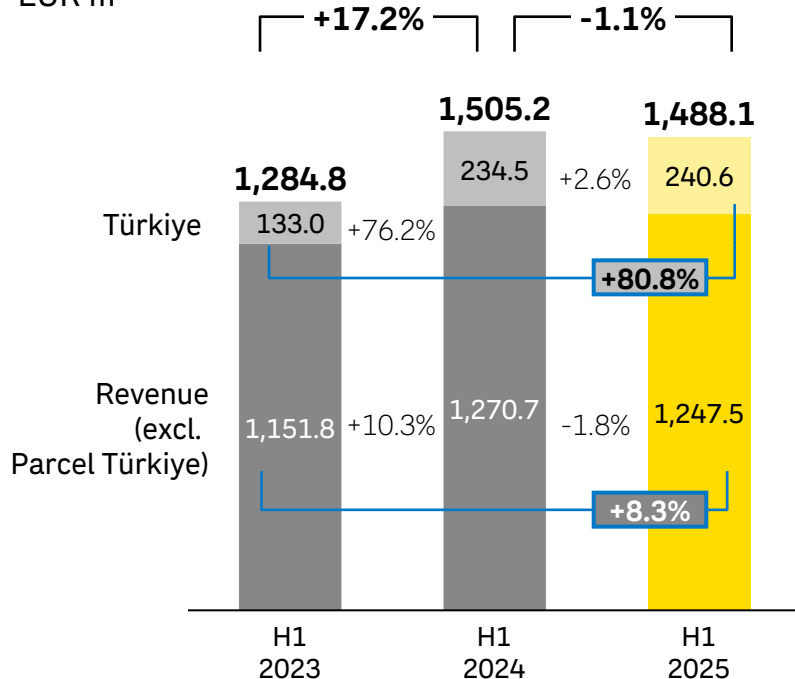


# SOLID REVENUE AND EARNINGS DEVELOPMENT FOLLOWING HIGH PRIOR-YEAR LEVEL



## Revenue development

EUR m



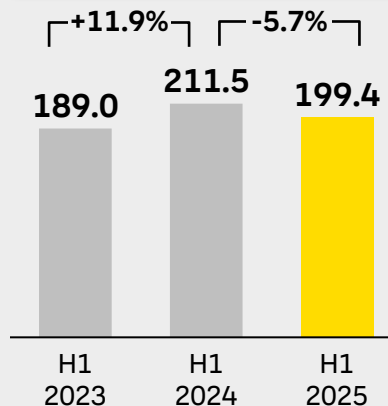
## Revenue comparison is impacted by elections and currency (2025 below 2024 but above the 2023 level)

Special effects in 2024:

- About EUR 20m related to elections in H1 2024
- Revenue development in Türkiye strongly impacted by inflation and the exchange rate (positive special effect of approx. EUR 65m in H1 2024)

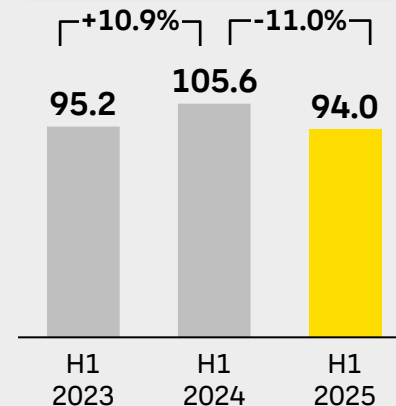
## EBITDA

(EUR m)



## EBIT

(EUR m)



# TOP PRIORITIES TO SUPPORT EARNINGS IN 2025/2026



## Sales campaign

- Group-wide intensification of international customer relationships – **Competence Centre for E-Commerce Platforms**
- Customer acquisition and existing customer development based on **growing out-of-home offering** in the CEE/SEE region: +10,000 lockers over the next three years
- Strengthening of the **market position in Slovakia** through the acquisition of the customer base of Quality Delivery Logistics
- Strengthening of the **market position in Türkiye** based on a national sales campaign and expansion in Azerbaijan, Georgia and Uzbekistan



## Efficiency & costs

- Cost reduction in operating areas by optimising the product mix (**Eco as standard** as of 1 May 2025) as well as the efficient and flexible deployment of staff
- Leveraging of synergies through the **integration of affiliates** into the parent company Österreichische Post AG
- Expansion of cooperation with external logistics partners and other cost reduction through a **quality drive implemented by Aras Kargo** (project to reduce damages and losses)
- **Group-wide cost optimisation** in administrative areas (focus on costs, terms and conditions)





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1. Highlights and Overview



**2. Strategy Implementation**

3. Group Results H1 2025

4. Outlook 2025

# AMBITION 2030: LEADING LOGISTICS & SERVICES GROUP REACHING MORE THAN 150M PEOPLE IN AUSTRIA, CEE/SEE, TÜRKIYE & BEYOND

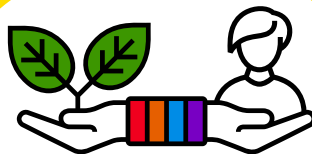


1



## POST & BEYOND IN AUSTRIA

Leading provider of  
key services –  
post, bank & more



**SUSTAINABILITY,  
CUSTOMER & CULTURE**  
Sustainability-oriented,  
customer-driven,  
and people-focused  
company

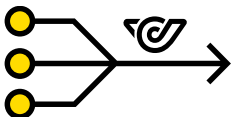
2



## INTERNATIONAL E-COMMERCE

Leading e-commerce  
partner in Austria, CEE/SEE,  
Türkiye & beyond to reach  
more than 150m people

3

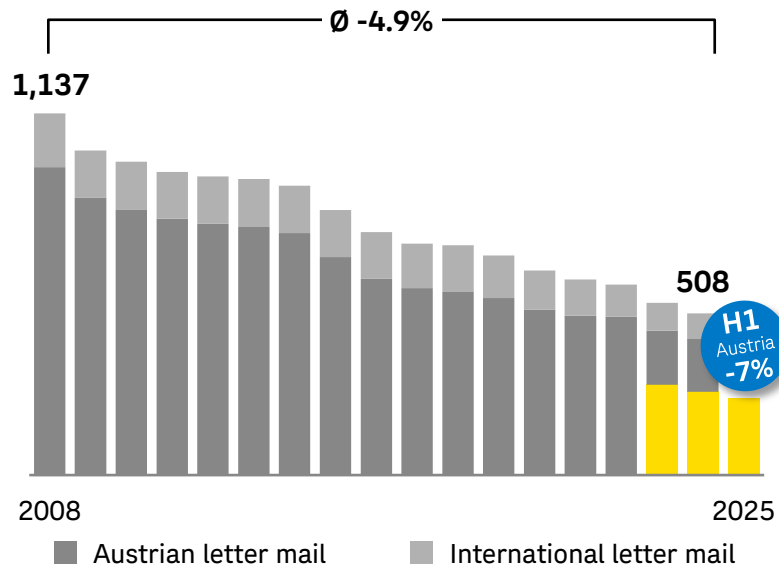


**ONE GROUP – OPERATIONALLY EXCELLENT**  
Efficiency- and technology-focused integrated group

# 1 LETTER MAIL

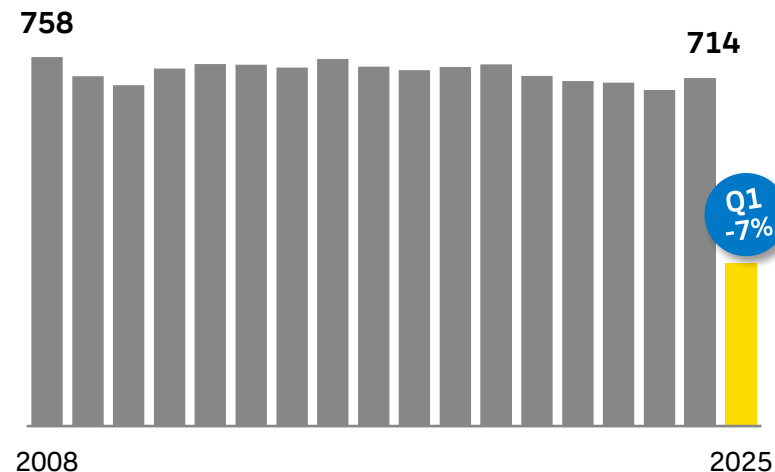


**Austrian and International Letter Mail volumes**  
millions of shipments



Volumes adjusted on a daily basis (124 working days in H1 2024 vs. 122 working days in H1 2025)

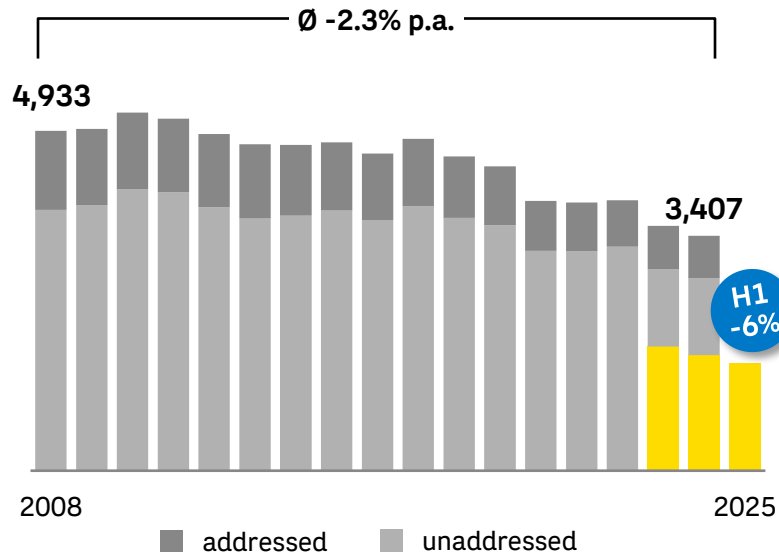
**Revenue**  
EUR m



# 1 DIRECT MAIL/MEDIA POST IN AUSTRIA

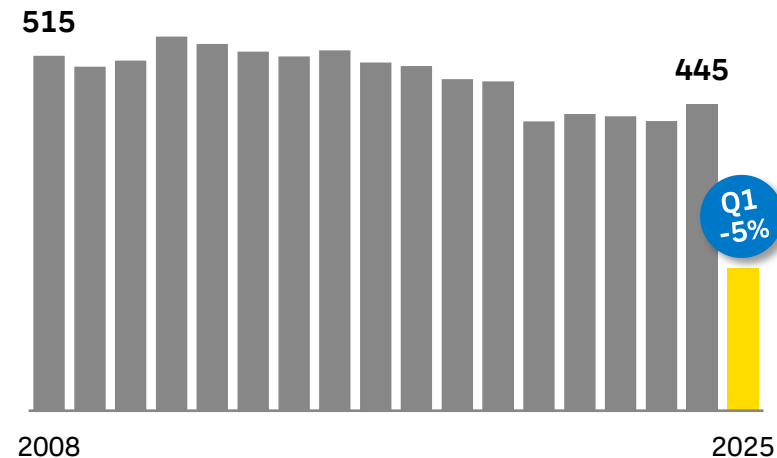


Direct Mail/Media Post volumes  
millions of shipments



Volumes adjusted on a daily basis (124 working days in H1 2024 vs. 122 working days in H1 2025)

Revenue  
EUR m



# 1 AUSTRIA IN THE LOWER THIRD IN EUROPE FOR POSTAGE RATES



since 1.5.2025

Postage rate adjustments as of 1.5.2025		Old rates	New rates
National letter (formerly ECO)	Letter S	0.95	1.00
	Letter M	1.50	1.55
	Parcel S	3.00	3.10
	Parcel M	4.50	4.65
Letter additional Premium service (formerly PRIO)	Letter S	1.20	+0.30
	Letter M	1.65	
	Parcel S	3.30	
	Parcel M	4.75	

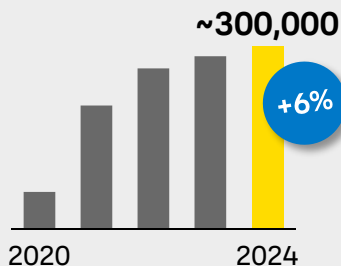
# 1 BANK99 ON TRACK, H1 2025 WITH POSITIVE EARNINGS

bank  
99

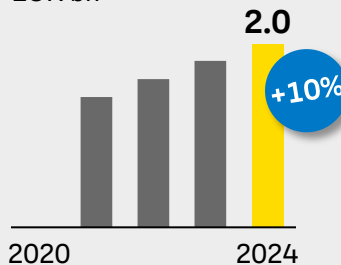


2024 vs. 2023

## Customers Number

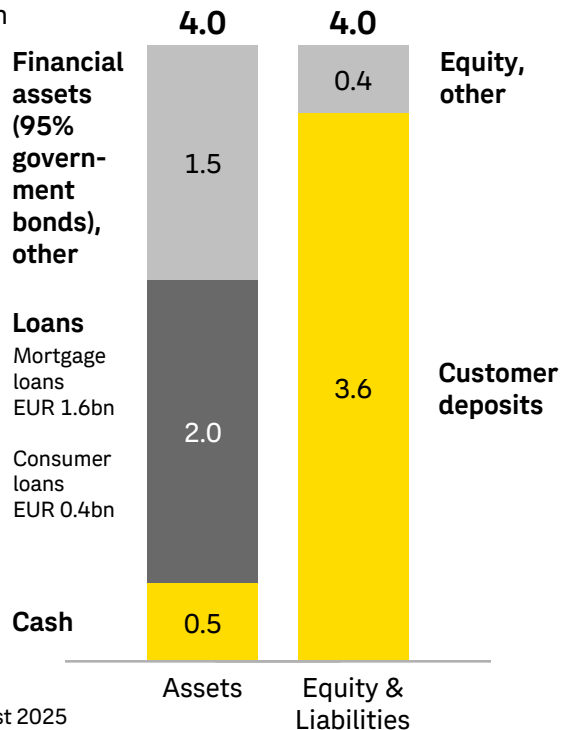


## Loan volume EUR bn



## bank99 balance sheet total as at 30.06.2025

EUR bn



bank99 offers extensive savings and loan products



Positive operational development after successful core banking migration



Positive earnings in H1 2025



Solid market position due to high level of transparency and quality of banking advice

# 1 24/7 SELF-SERVICE SOLUTIONS ARE VERY POPULAR WITH CUSTOMERS IN AUSTRIA

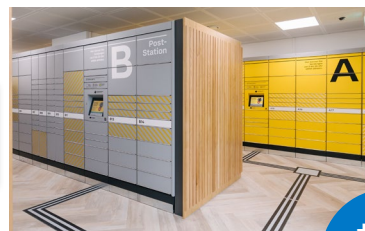
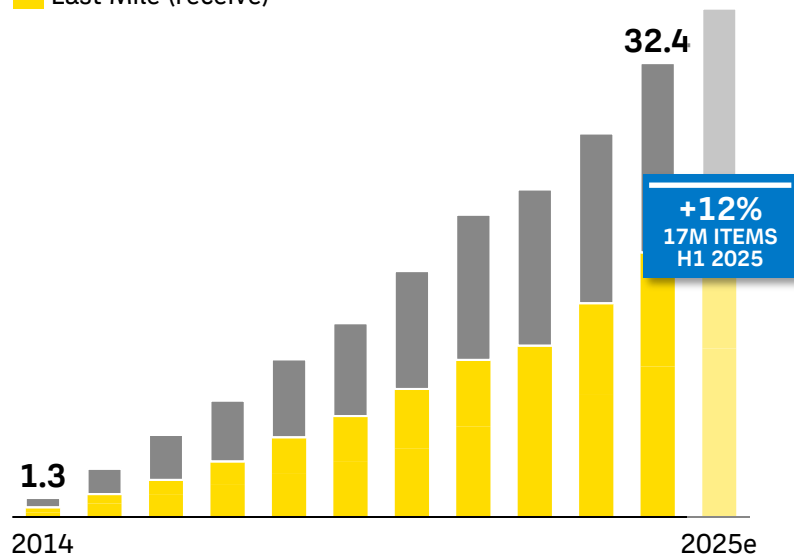


## Volumes

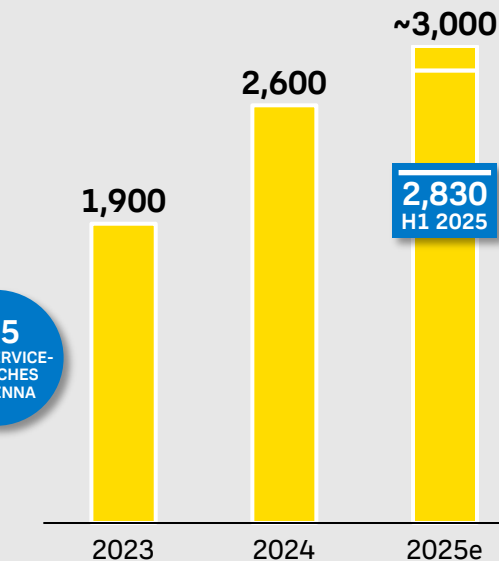
(millions of items)

■ First Mile (send, return)

■ Last Mile (receive)



## Expansion of the Austrian-wide network (out-of-home locations)





# 1 DEVELOPMENT OF A PROPRIETARY MOBILE PHONE OFFERING



**Future cooperation with A1 on a new level**



**Austrian Post as a Mobile  
Virtual Network Operator  
(MVNO) in the A1 network**

**Attractive mobile phone and  
internet offering at all  
post offices**

**A1 products available at post  
offices before the end of 2025**

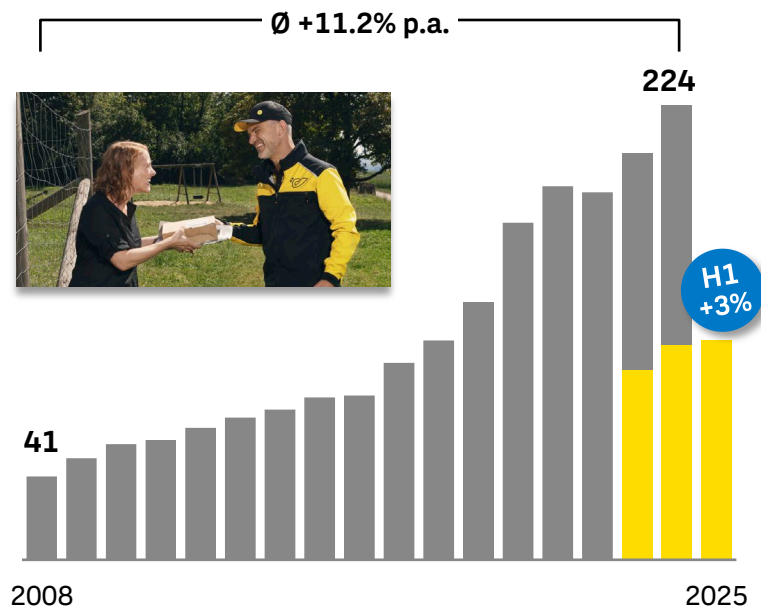
**Launch in April 2026**



## 2 PARCEL AUSTRIA WITH FURTHER GROWTH



Parcel volumes  
millions of items



Volumes adjusted on a daily basis (124 working days in H1 2024 vs. 122 working days in H1 2025)

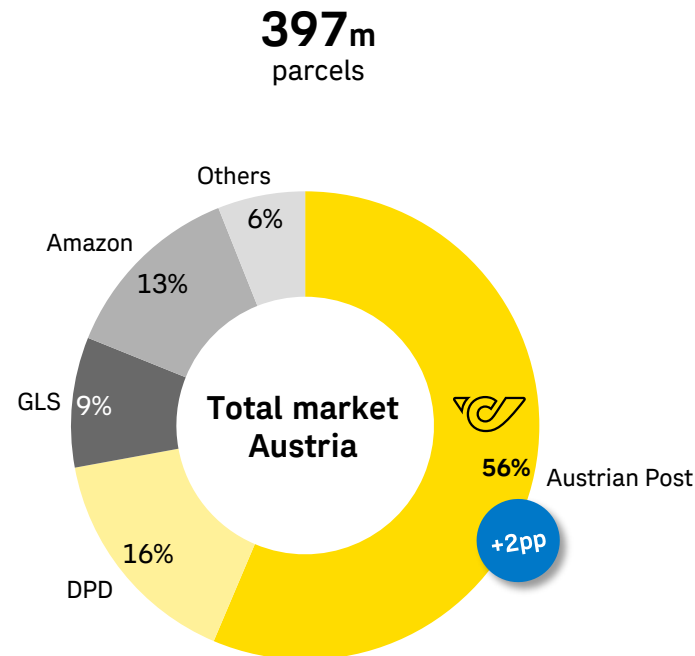
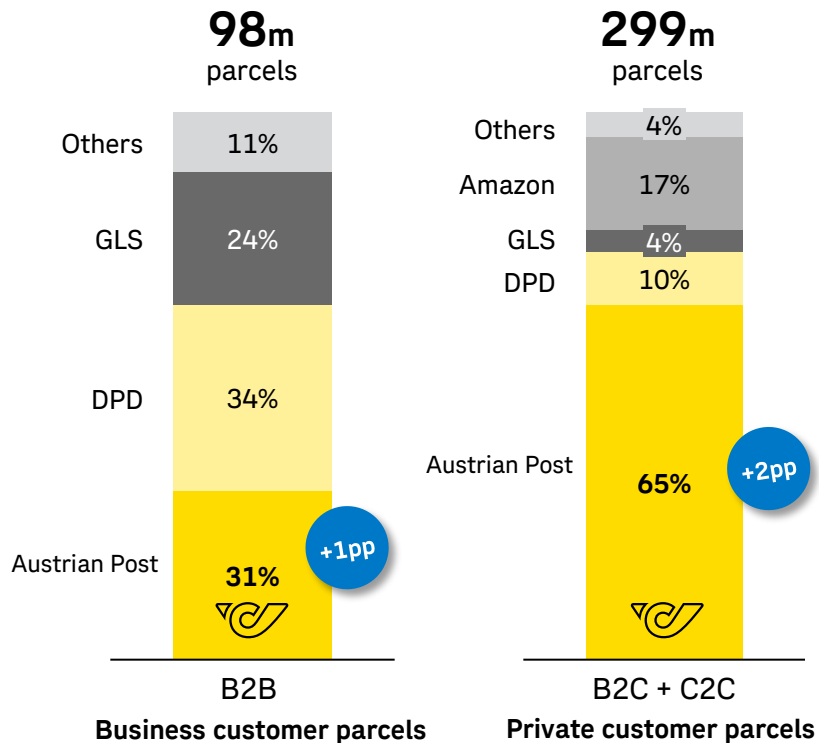
Revenue  
EUR m



## 2 2024 AUSTRIAN PARCEL MARKET



### Market shares by volume

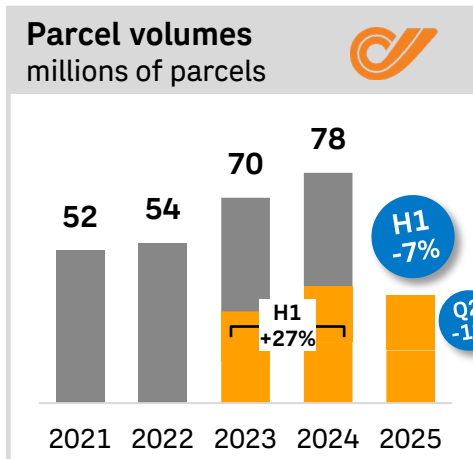


Source: BRANCHENRADAR.com Marktanalyse GmbH, February 2025

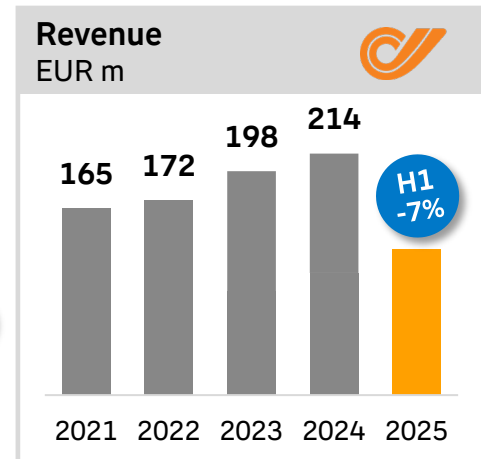
INVESTOR PRESENTATION Investor Relations, August 2025

2024 vs. 2023

## 2 CEE/SEE: RECOVERY OF PARCEL VOLUMES IN Q2 2025



● Volumes adjusted on a daily basis

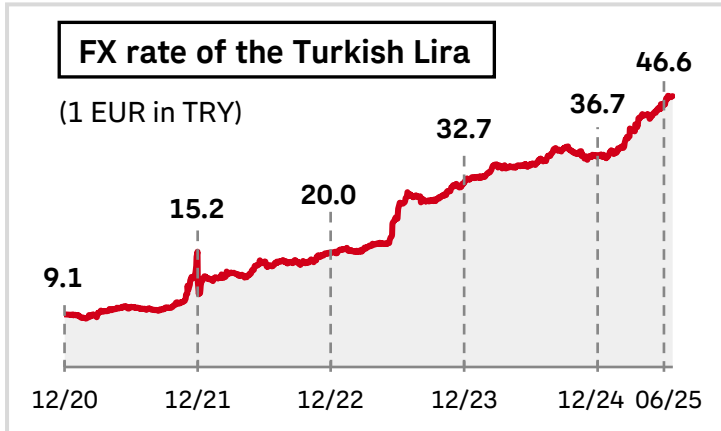


- 7% volume decrease in H1 2025 after parcel boom from Asia in the prior-year period (H1 2024: +27%)
- Recovery in Q2 2025 parcel volume: decrease of only 1% yoy vs 13% decline yoy in Q1 2025

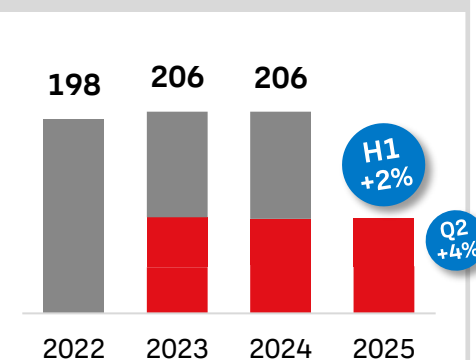
## 2 TÜRKIYE+: POSITIVE PARCEL GROWTH OF 4% IN Q2



- Revenue affected by inflation and exchange rate
- 0.4% volume decline in Q1 2025 vs. 4% rise in Q2 2025
- H1 2025 revenue of EUR 236.6m (+1.4%)
- Expansion of parcel logistics following our customers to Azerbaijan, Georgia and Uzbekistan
- Stable ownership structure: Baran Aras remains 20% minority shareholder (at least until 2035)

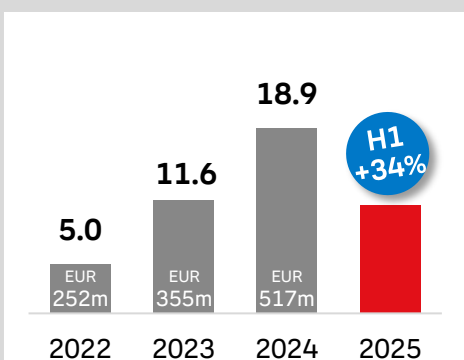


### Parcels & documents millions of items



Volumes adjusted on a daily basis

### Revenue TRY bn

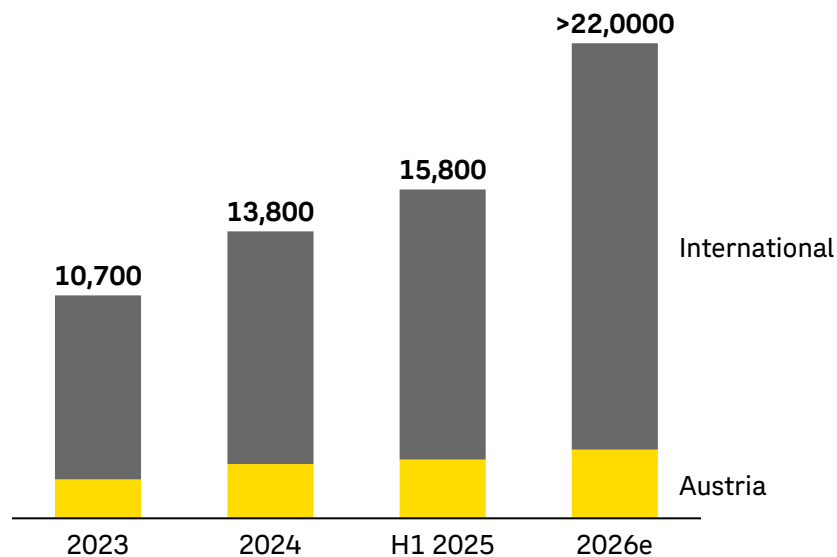


## 2 STRONG GROWTH OF OUT-OF-HOME NETWORK



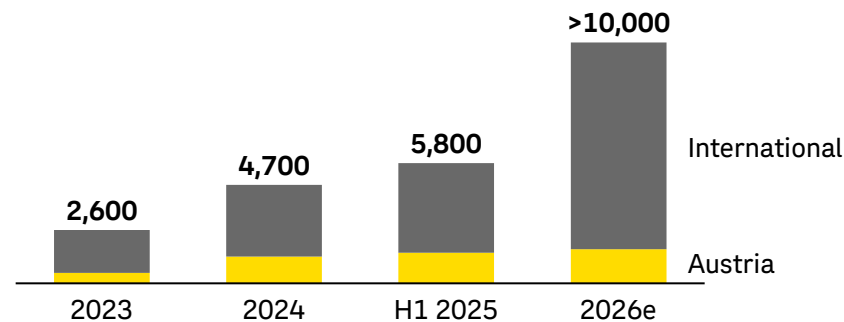
### Out-of-home points

Number of locations



### Of which postal stations / parcel machines

Number of locations<sup>1</sup>

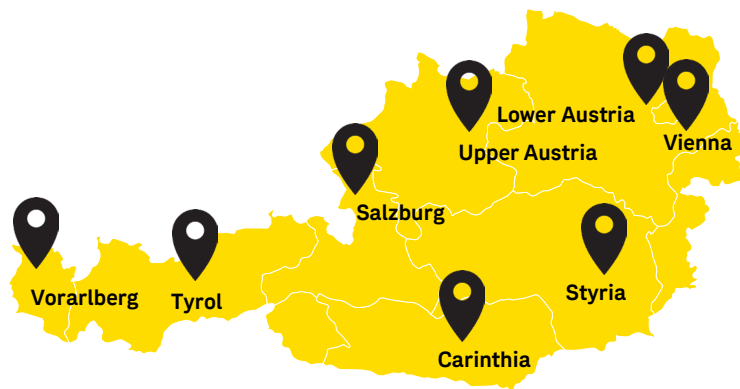


<sup>1</sup> Own and external locations

### 3 FINALISATION OF LOGISTICS EXPANSION IN AUSTRIA AND STRONGER INTERNATIONAL FOCUS

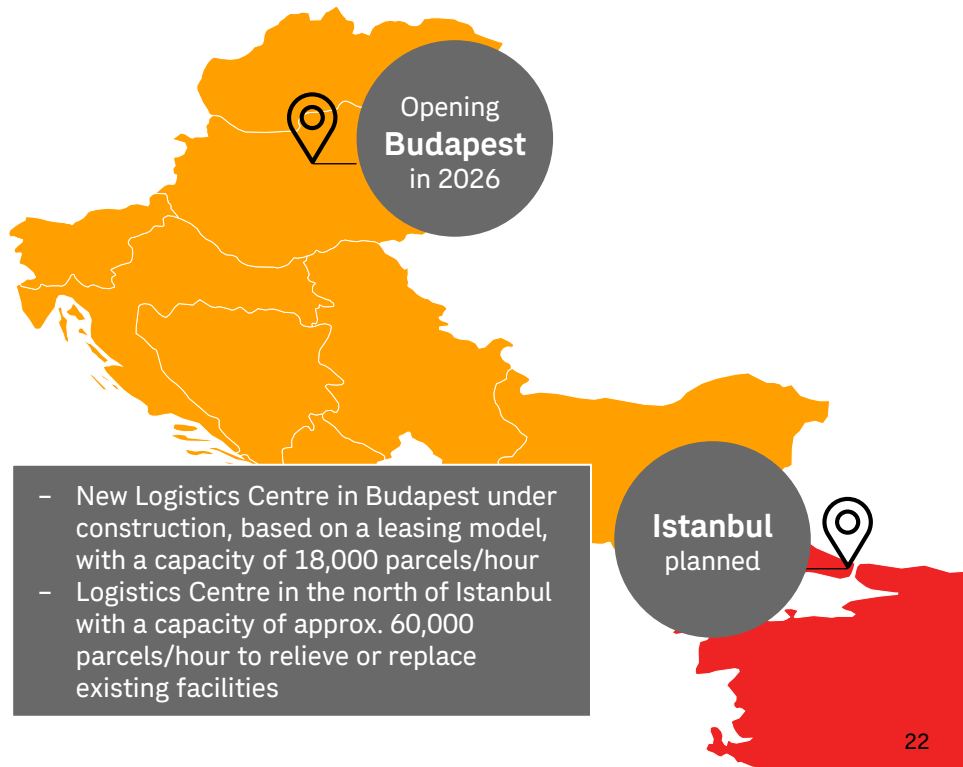


#### Austria



- Expansion programme largely completed
- Sorting capacity of 143,000 parcels/hour
- Planned enlargement of the Salzburg Logistics Centre in 2026/27

#### International



- New Logistics Centre in Budapest under construction, based on a leasing model, with a capacity of 18,000 parcels/hour
- Logistics Centre in the north of Istanbul with a capacity of approx. 60,000 parcels/hour to relieve or replace existing facilities



### 3 USE OF MODERN TECHNOLOGIES AND INFRASTRUCTURE



Next generation:  
**Handhelds**



Parcel robot "Robin" sorts  
more than **1m parcels** per year



Highly efficient, automated  
**storage and order  
picking system**



# ► MASTERPLAN SUSTAINABILITY 2030



## TARGET PICTURE & GUIDING PRINCIPLE

## STRATEGIC DIRECTION

### ENVIRONMENT

We are striving to continuously and economically viably decarbonise our services, thereby offer ecological solutions and secure our future as a successful company.

- 1 Decarbonisation of logistics
- 2 Decarbonisation of the infrastructure
- 3 Resource-efficient processes
- 4 Circular economy

### SOCIAL

We want to be a top employer and attract the best employees, and focus on corporate culture, diversity and equal opportunities, health and safety, and fair working conditions.

- 5 Corporate culture
- 6 Integrated diversity management
- 7 Occupational health and safety
- 8 Fair working conditions

### GOVERNANCE

We aim to be the preferred partner for our customers connecting people, markets, and companies. We create value for our customers and stakeholder in the short, medium and long term on the foundation of our responsible structures and processes.

- 9 Sustainable governance & compliance
- 10 Sustainable procurement
- 11 Digital responsibility
- 12 Customer & stakeholder value



# ➤ VIENNA: POSTAL DELIVERIES EXCLUSIVELY WITH ELECTRIC VEHICLES BY THE END OF THE YEAR

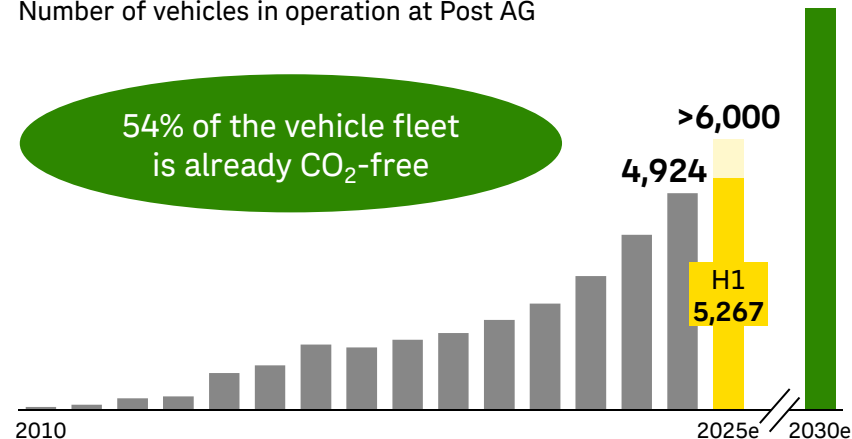


700 electric-powered CO<sub>2</sub>-free vehicles are already in use. Vienna is a pioneer among European cities.



## E-vehicle fleet ramp up curve

Number of vehicles in operation at Post AG



# AUSTRIAN POST GROUP – ON THE ROAD TO PARIS

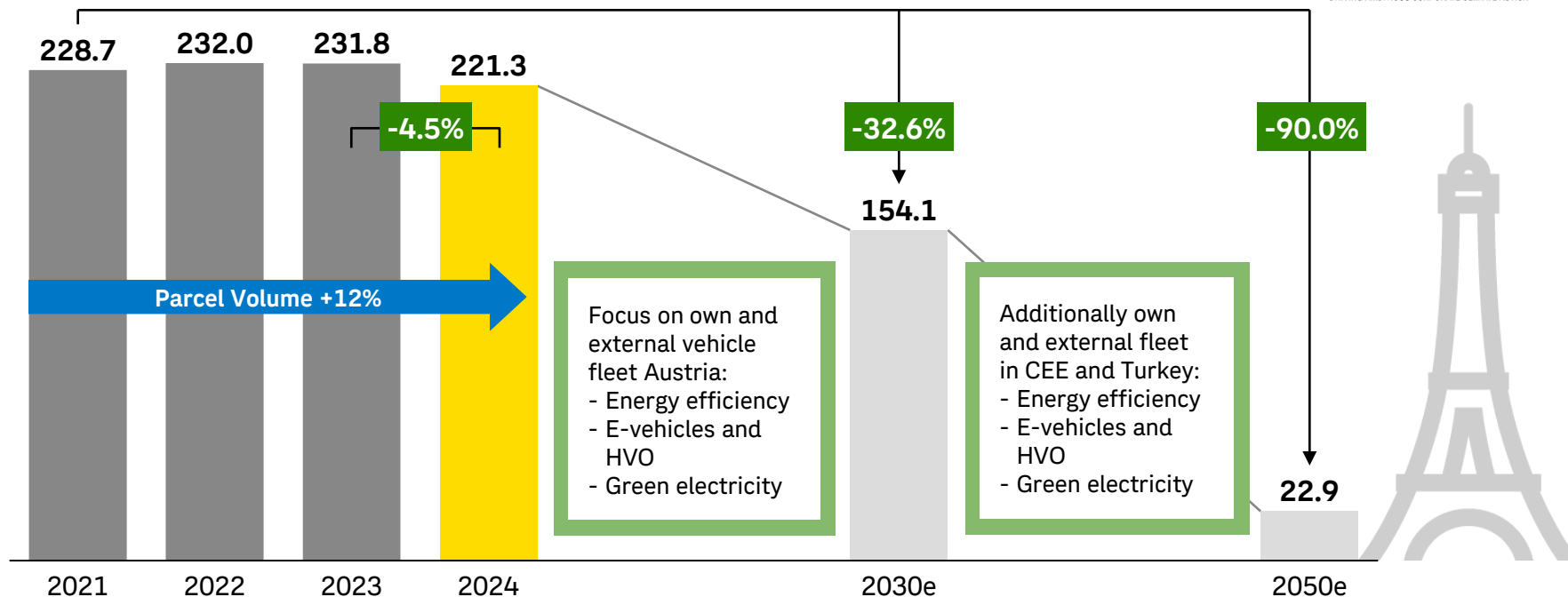


## Logistics-related Decarbonisation plan Austrian Post Group

Scope 1–3, thousand tonnes



DRIVING AMBITIOUS CORPORATE CLIMATE ACTION

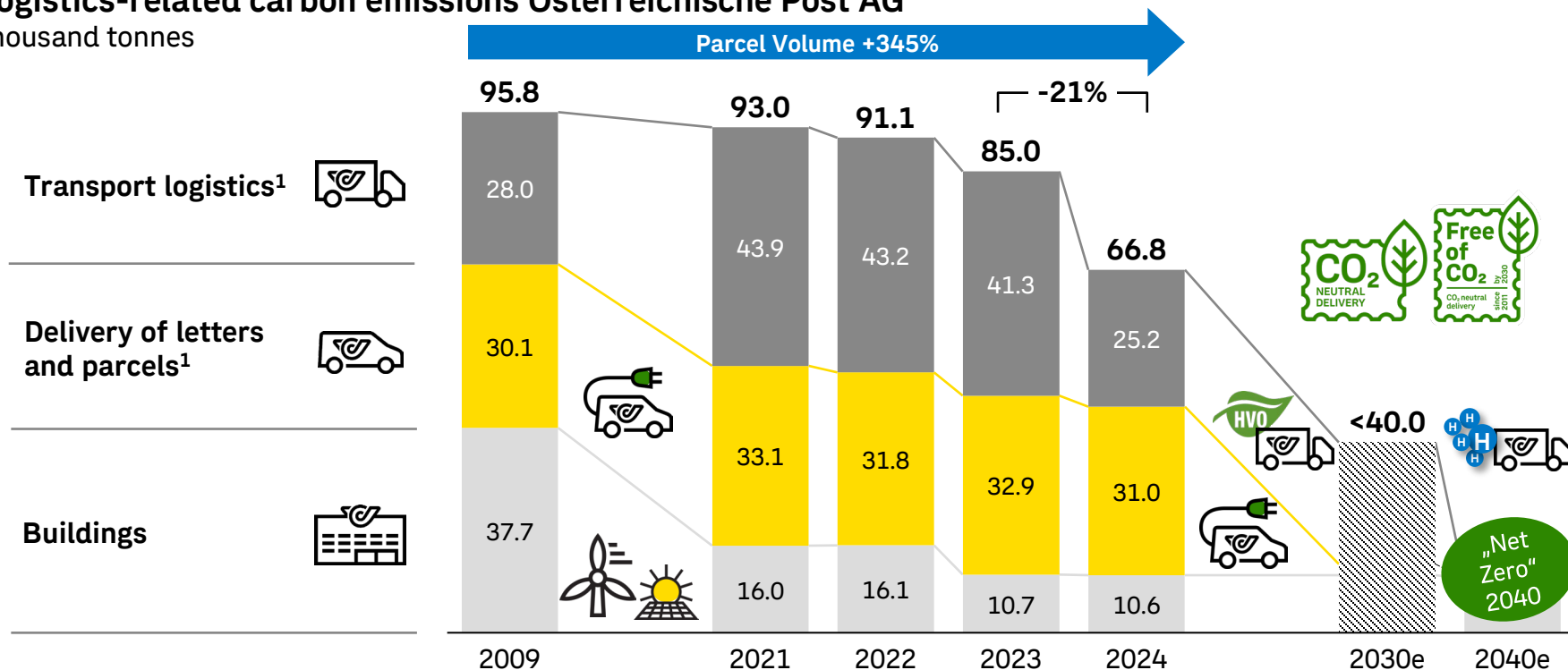


# DECARBONISATION – ROADMAP AUSTRIA



## Logistics-related carbon emissions Österreichische Post AG

thousand tonnes

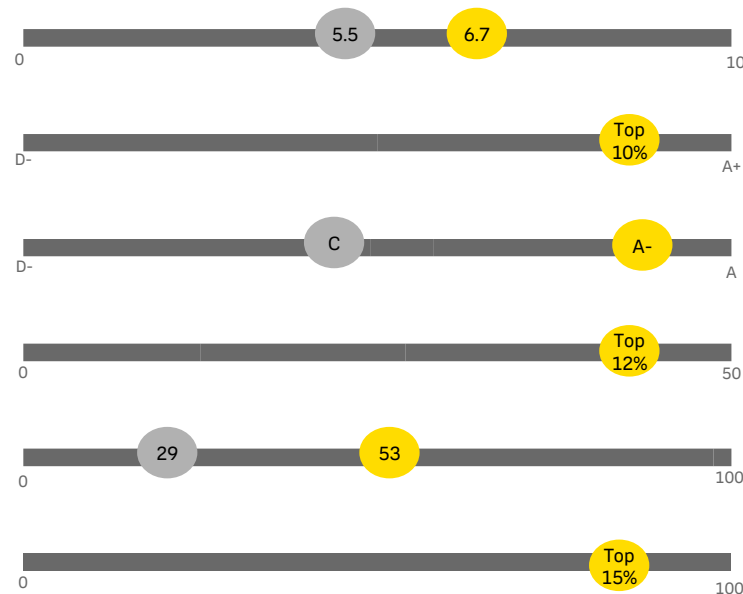


<sup>1</sup> Own and external vehicle fleet

# ➤ AUSTRIAN POST'S ESG RATINGS CONSISTENTLY AT A HIGH LEVEL



	AAA (range from AAA to CCC)
	Prime Status, Rating C+ (range from A+ to D-)
	A- (range from A to D-)
	Low Risk (16.3) (range from 0 to 50)
	53 out of 100 points
	Silver (68 out of 100 points)



# ➤ KEY FIGURES IN ACCORDANCE WITH THE EU TAXONOMY REGULATION

● Eligibility (%)  
● Alignment (%)

## Revenue EUR m

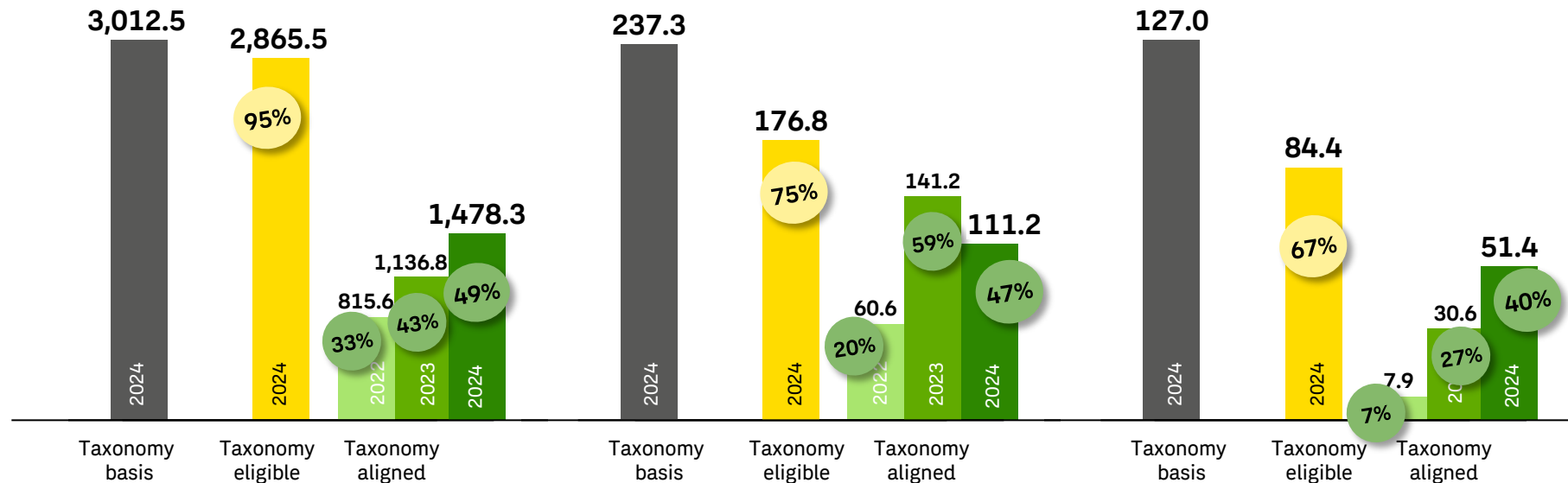
- Increase: primarily through compliant e-vehicles
- Potential: expansion of e-mobility in own and external vehicle fleet

## CapEX EUR m

- Decrease due to: Completion of investment programme and lower IFRS 16 long-term rents
- Potential: logistics buildings abroad

## OpEx EUR m

- Increase: mainly due to maintenance of buildings and vehicles







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# FINANCIAL OVERVIEW



**Revenue**  
EUR 1.5bn

-1.1% vs. H1 2024

2024 impacted by  
positive special effects

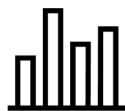
+15.8% vs. H1 2023



**EBIT**  
EUR 94m

-11.0% vs. H1 2024

At the level of H1 2023



**Balance sheet**  
EUR 6.2bn

Solid balance sheet structure with low level of debt  
(Financial debt to EBITDA<sub>12m</sub> of 0.5x)

Logistics equity ratio of 28%



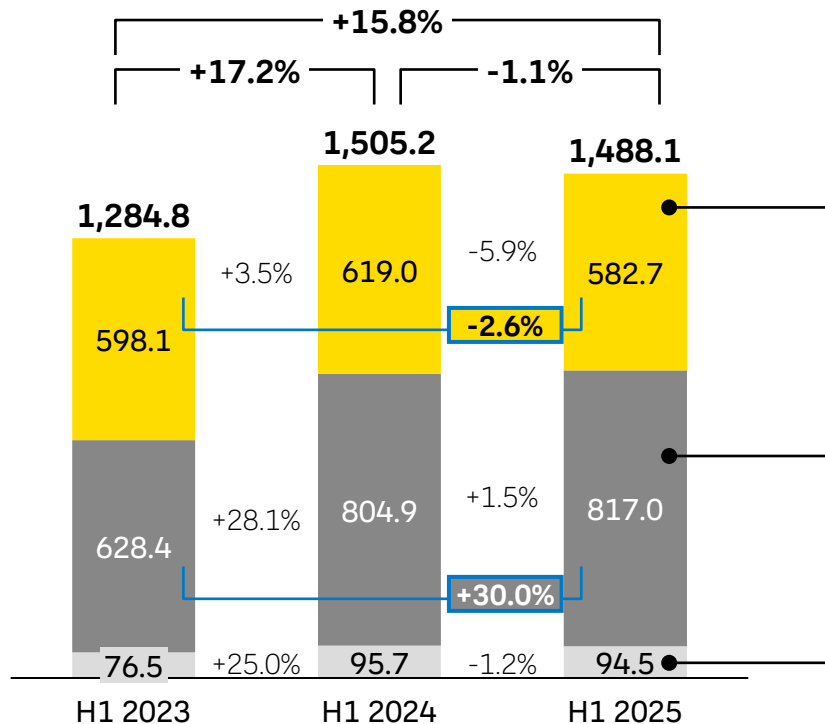
**Cash flow**  
EUR 161m

Operating free cash flow higher than in recent years

# REVENUE SLIGHTLY BELOW H1 2024 BUT 15.8% HIGHER THAN H1 2023



## Revenue development EUR m



### Mail

- H1 2025 revenue down by 5.9% from H1 2024 and 2.6% below H1 2023
- H1 2024 was impacted by positive special effects of about EUR 20m for letter mail and direct mail volumes

### Parcel & Logistics

- H1 2025 revenue up by 1.5% (+2.5% before reporting change in Logistics Solutions) and 30.0% above H1 2023
- Parcel Austria: +5.2% in H1 2025
- Parcel Türkiye+: +2.6% in H1 2025 (+80.8% vs. H1 2023)
- Parcel CEE/SEE: -7.1% in H1 2025 (volatile volumes from Asian suppliers)

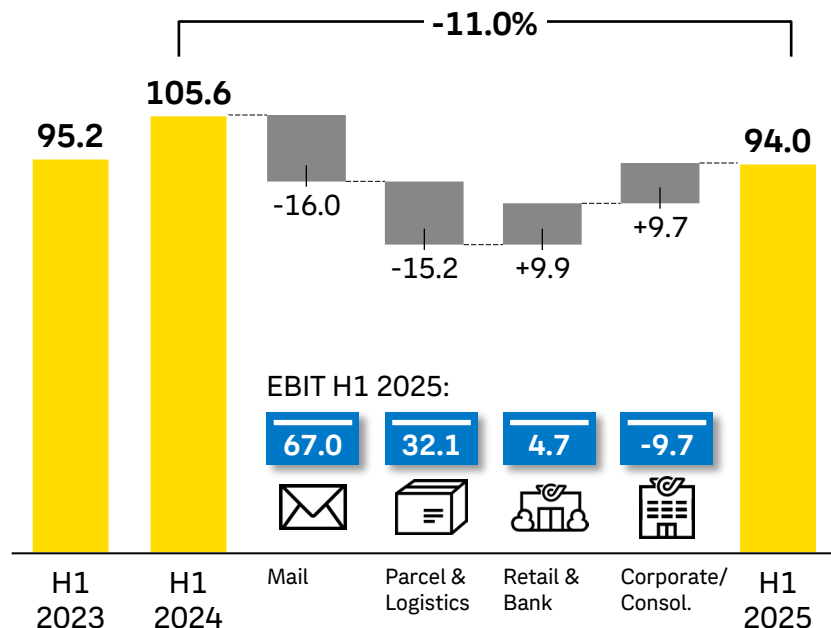
### Retail & Bank

- Revenue in H1 2025 down by 1.2%
- Income from Financial Services below the prior-year level due to the low interest rate environment

# H1 2025 EARNINGS OF EUR 94M – POSITIVE SPECIAL EFFECTS (ELECTIONS AND CURRENCY) IN THE PREVIOUS YEAR



EBIT development  
EUR m



## Mail

- Volume decline and positive special effects in the previous year negatively impact earnings
- H1 2025 -19.3% to EUR 67.0m



## Parcel & Logistics

- Divisional earnings show reduced profitability in Türkiye and CEE/SEE
- H1 2025 -32.1% to EUR 32.1m



## Retail & Bank

- Earnings increase based on positive contribution of bank99 and the branch network
- H1 2025 of EUR 4.7m from minus EUR 5.3m in the previous year

# KEY INCOME STATEMENT INDICATORS



EUR m	H1 2023	H1 2024	H1 2025	Δ 24/25	Q2 2023	Q2 2024	Q2 2025	
<b>Revenue</b>	<b>1,284.8</b>	<b>1,505.2</b>	<b>1,488.1</b>	<b>-1.1%</b>	<b>620.2</b>	<b>746.6</b>	<b>724.6</b>	Mail -5.9% Parcel & Logistics +1.5% (+2.5% excl. reporting change) Retail & Bank -1.2% (-2 working days vs. 2024)
Other operating income	38.0	47.8	60.1	25.6%	19.4	24.3	28.1	
Raw materials, consumables and services used	-374.7	-433.9	-429.5	1.0%	-177.1	-209.6	-207.5	
Expenses for financial services	-5.8	-23.7	-22.6	4.6%	-3.9	-12.4	-9.7	Other operating income proceed from property sales as well as indexation of rents and leases
Staff costs	-579.2	-692.7	-699.0	-0.9%	-279.4	-350.9	-338.8	
Other operating costs	-177.9	-196.2	-202.8	-3.4%	-86.6	-92.4	-100.2	Salary increases mandated by collective agreements:
At equity consolidation	0.8	1.3	1.9	41.3%	0.8	0.8	0.9	- as of 1/1/2025: +6.45%
Net monetary gain	3.1	3.6	3.2	-10.6%	0.7	1.7	0.4	- as of 1/7/2025: +2.80%
<b>EBITDA</b>	<b>189.0</b>	<b>211.5</b>	<b>199.4</b>	<b>-5.7%</b>	<b>93.9</b>	<b>108.1</b>	<b>97.8</b>	
<i>EBITDA margin</i>	<i>14.7%</i>	<i>14.1%</i>	<i>13.4%</i>	-	<i>15.1%</i>	<i>14.5%</i>	<i>13.5%</i>	
Depreciation, amortisation and impairment	-93.8	-105.9	-105.4	0.5%	-45.7	-54.9	-52.2	
<b>EBIT</b>	<b>95.2</b>	<b>105.6</b>	<b>94.0</b>	<b>-11.0%</b>	<b>48.2</b>	<b>53.2</b>	<b>45.6</b>	Prior-year earnings impacted by major elections and currency effects
<i>EBIT margin</i>	<i>7.4%</i>	<i>7.0%</i>	<i>6.3%</i>	-	<i>7.8%</i>	<i>7.1%</i>	<i>6.3%</i>	
Financial result	5.7	-1.6	-1.8	-11.3%	9.1	-2.9	-4.1	
Income tax	-22.3	-25.5	-23.8	6.7%	-10.6	-13.5	-12.7	
<b>Profit for the period</b>	<b>78.6</b>	<b>78.5</b>	<b>68.4</b>	<b>-12.8%</b>	<b>46.6</b>	<b>36.8</b>	<b>28.8</b>	Earnings per share down from EUR 1.12 to EUR 0.99
Earnings per share (EUR)	1.13	1.12	0.99	-11.3%	0.67	0.53	0.43	



# MAIL DIVISION: KEY INCOME STATEMENT INDICATORS



EUR m	H1 2023	H1 2024	H1 2025	Δ 24/25	Q2 2023	Q2 2024	Q2 2025	
<b>Revenue</b>	<b>598.1</b>	<b>619.0</b>	<b>582.7</b>	<b>-5.9%</b>	<b>289.5</b>	<b>303.5</b>	<b>283.2</b>	Revenue decrease of 5.9% yoy; 2.6% below H1 2023
• Letter Mail & Business Solutions	378.7	389.3	365.5	-6.1%	180.6	188.7	174.0	
• Direct Mail	155.3	160.9	151.2	-6.0%	76.1	79.6	75.2	Positive special effects of about EUR 20m from major elections in H1 2024
• Media Post	64.1	68.8	66.0	-4.1%	32.8	35.2	34.1	
Revenue intra-Group	2.3	2.1	2.5	17.4%	1.2	1.1	1.2	
Total revenue	600.4	621.2	585.2	-5.8%	290.7	304.6	284.4	
<b>EBIT</b>	<b>77.6</b>	<b>83.0</b>	<b>67.0</b>	<b>-19.3%</b>	<b>36.7</b>	<b>40.7</b>	<b>29.1</b>	Reduced profitability related to strong volume decline
<i>EBIT margin<sup>1</sup></i>	<i>12.9%</i>	<i>13.4%</i>	<i>11.4%</i>	-	<i>12.6%</i>	<i>13.4%</i>	<i>10.2%</i>	

<sup>1</sup> EBIT margin in relation to total revenue



# PARCEL & LOGISTICS DIVISION: KEY INCOME STATEMENT INDICATORS



EUR m	H1 2023	H1 2024	H1 2025	Δ 24/25	Q2 2023	Q2 2024	Q2 2025	
<b>Revenue</b>	<b>628.4</b>	<b>804.9</b>	<b>817.0</b>	<b>1.5%</b>	<b>301.3</b>	<b>402.0</b>	<b>398.7</b>	Revenue +1.5% or +2.5% before reporting change in Logistics Solutions (about EUR 8m attributed to Logistics Solutions in 2024 is now reported as intra-Group revenue)
• Parcel Austria	373.9	434.8	457.2	5.2%	188.8	219.3	228.0	
• Parcel Türkiye+	133.0	234.5	240.6	2.6%	49.5	116.3	109.5	
• Parcel CEE/SEE	91.7	107.9	100.2	-7.1%	48.3	52.3	51.2	
• Logistics Solutions	33.5	34.1	26.7	-21.6%	16.7	17.3	13.7	Türkiye up by 2.6% after positive currency exchange effects in 2024: +76.2% in H1 and +135.0% in Q2 2024
• Consolidation	-3.7	-6.3	-7.7	-22.3%	-2.0	-3.2	-3.6	
Revenue intra-Group	0.3	0.4	8.9	>100%	0.2	0.2	4.5	
Total revenue	628.8	805.3	825.9	2.6%	301.5	402.2	403.2	
<b>EBIT</b>	<b>36.3</b>	<b>47.3</b>	<b>32.1</b>	<b>-32.1%</b>	<b>19.7</b>	<b>23.1</b>	<b>13.5</b>	EBIT shows reduced profitability in Türkiye and in CEE/SEE
<i>EBIT margin<sup>1</sup></i>	<i>5.8%</i>	<i>5.9%</i>	<i>3.9%</i>	-	<i>6.5%</i>	<i>5.7%</i>	<i>3.4%</i>	

<sup>1</sup> EBIT margin in relation to total revenue





## RETAIL & BANK DIVISION: KEY INCOME STATEMENT INDICATORS



EUR m	H1 2023	H1 2024	H1 2025	Δ 24/25	Q2 2023	Q2 2024	Q2 2025	
<b>Revenue</b>	<b>76.5</b>	<b>95.7</b>	<b>94.5</b>	<b>-1.2%</b>	<b>39.1</b>	<b>48.4</b>	<b>45.8</b>	Revenue -1.2% vs H1 2024 but +23.4% vs. H1 2023
• Income from Financial Services	56.6	75.2	73.3	-2.6%	29.1	37.9	35.1	
• Branch Services	19.9	20.5	21.2	3.8%	10.0	10.5	10.7	
Revenue intra-Group	94.5	101.0	102.4	1.3%	47.1	50.5	50.8	
Total revenue	171.1	196.7	196.9	0.1%	86.2	98.9	96.6	
<b>EBIT</b>	<b>1.1</b>	<b>-5.3</b>	<b>4.7</b>	<b>&gt;100%</b>	<b>0.3</b>	<b>-2.6</b>	<b>5.7</b>	Earnings increase based on positive contribution of bank99 and the branch network
<i>EBIT margin<sup>1</sup></i>	<i>0.7%</i>	<i>-</i>	<i>2.4%</i>	<i>-</i>	<i>0.3%</i>	<i>-</i>	<i>5.9%</i>	

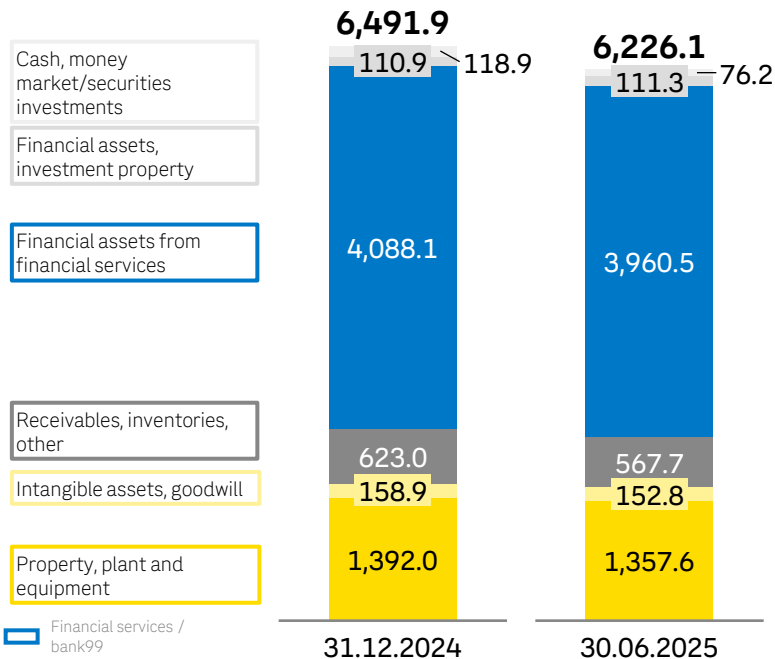
<sup>1</sup> EBIT margin in relation to total revenue

# SOLID BALANCE SHEET AND FINANCING STRUCTURE



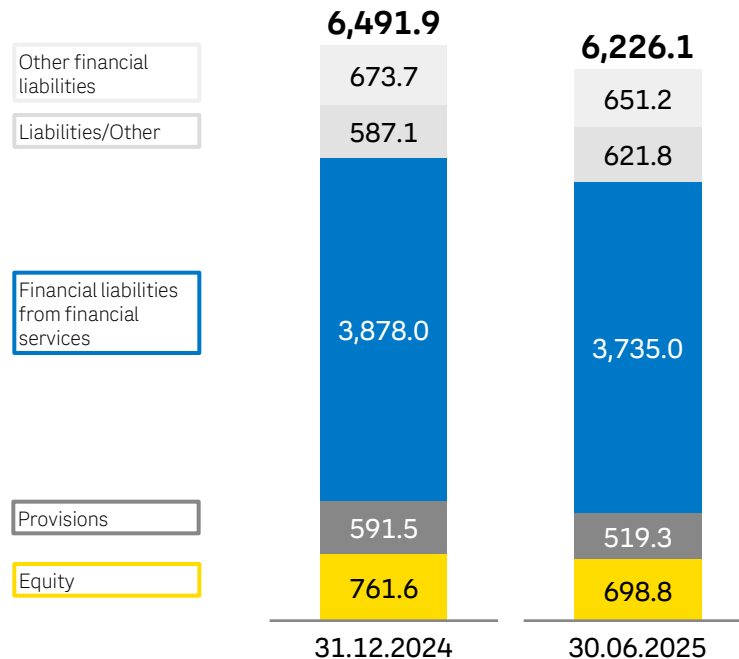
## ASSETS

EUR m



## EQUITY & LIABILITIES

EUR m

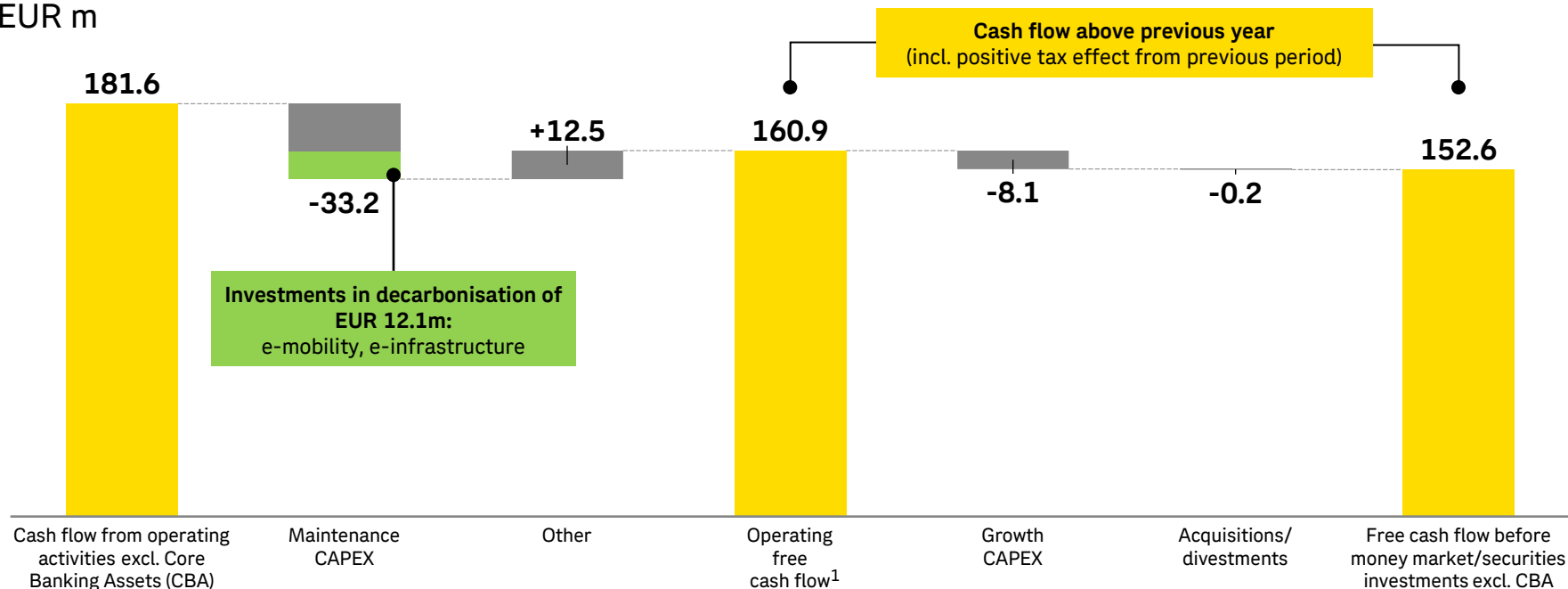


Financial debt	EUR 207.5m
Financial debt incl. IFRS 16	EUR 575.0m
Financial debt/EBITDA <sub>12m</sub>	0.5x
Financial debt incl. IFRS 16/EBITDA <sub>12m</sub>	1.4x

# H1 2025 OPERATING FREE CASH FLOW OF EUR 161M



EUR m



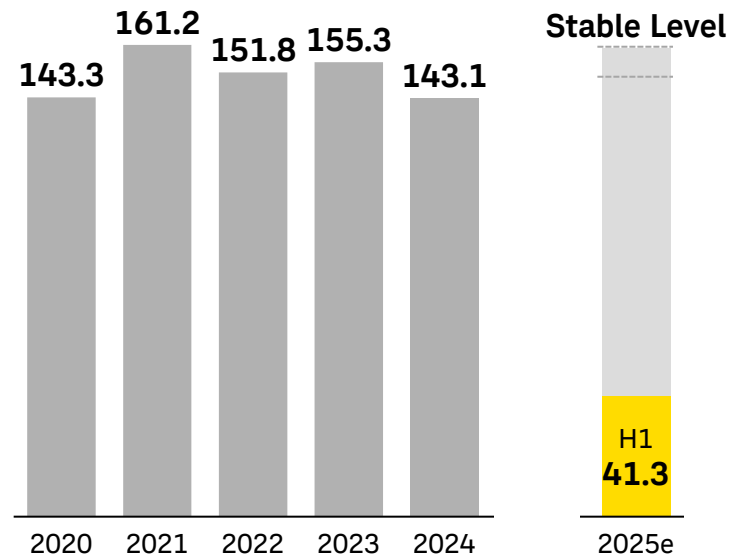
	H1 2024						
	175.2	-36.0	+7.9	147.1	-10.3	-3.2	133.6

<sup>1</sup> Free cash flow before acquisitions/securities/money market investments, growth CAPEX and core banking assets (CBA)

# AUSTRIAN POST'S INVESTMENT PROGRAMME



CAPEX  
EUR m

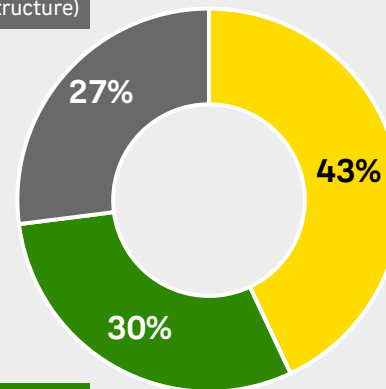


INVESTOR PRESENTATION Investor Relations, August 2025

CAPEX mix 2022–2024


Growth Capex  
(Growth - Infrastructure)

Decarbonisation



Maintenance  
CAPEX  
(Technology and  
Automation)



- 
- 
1. Highlights and Overview
  2. Strategy Implementation
  3. Group Results H1 2025
  - 4. Outlook 2025**

# OUTLOOK 2025



## Market environment



- Weak economic growth accelerates cost pressure and digitalisation by private and public sector customers → decline in letter and direct mail volumes
- Parcel markets with increasing e-commerce and cautious consumption → moderate parcel growth

## Revenue



- 2025 revenue targeted at the prior-year level (sharp increase of 13.9% in 2024 related to positive election and currency effects)
  - Mail: Expected revenue decline
  - Parcel & Logistics: Further growth anticipated in the parcel business (depending on the TRY/EUR exchange rate)
  - Retail & Bank: Revenue in the order of the previous year
- Assumption:
  - No negative impact related to trade conflicts or lack of economic momentum
  - Impact of TRY/EUR exchange rate by  $\pm 3\%$  on revenue forecast accuracy

## Investments



- Total CAPEX 2025 at the same level as in recent years (EUR 150m -160m)
- This includes maintenance investments, decarbonisation of logistics investments and growth investments

## Earnings



- Cost discipline and efficiency to ensure stability
- Target unchanged: Earnings (EBIT) in the order of EUR 200m in 2025

# EUR 4BN IN REVENUE TARGETED FOR 2030



A profitable growth with an EBIT margin of >6% is the targeted goal

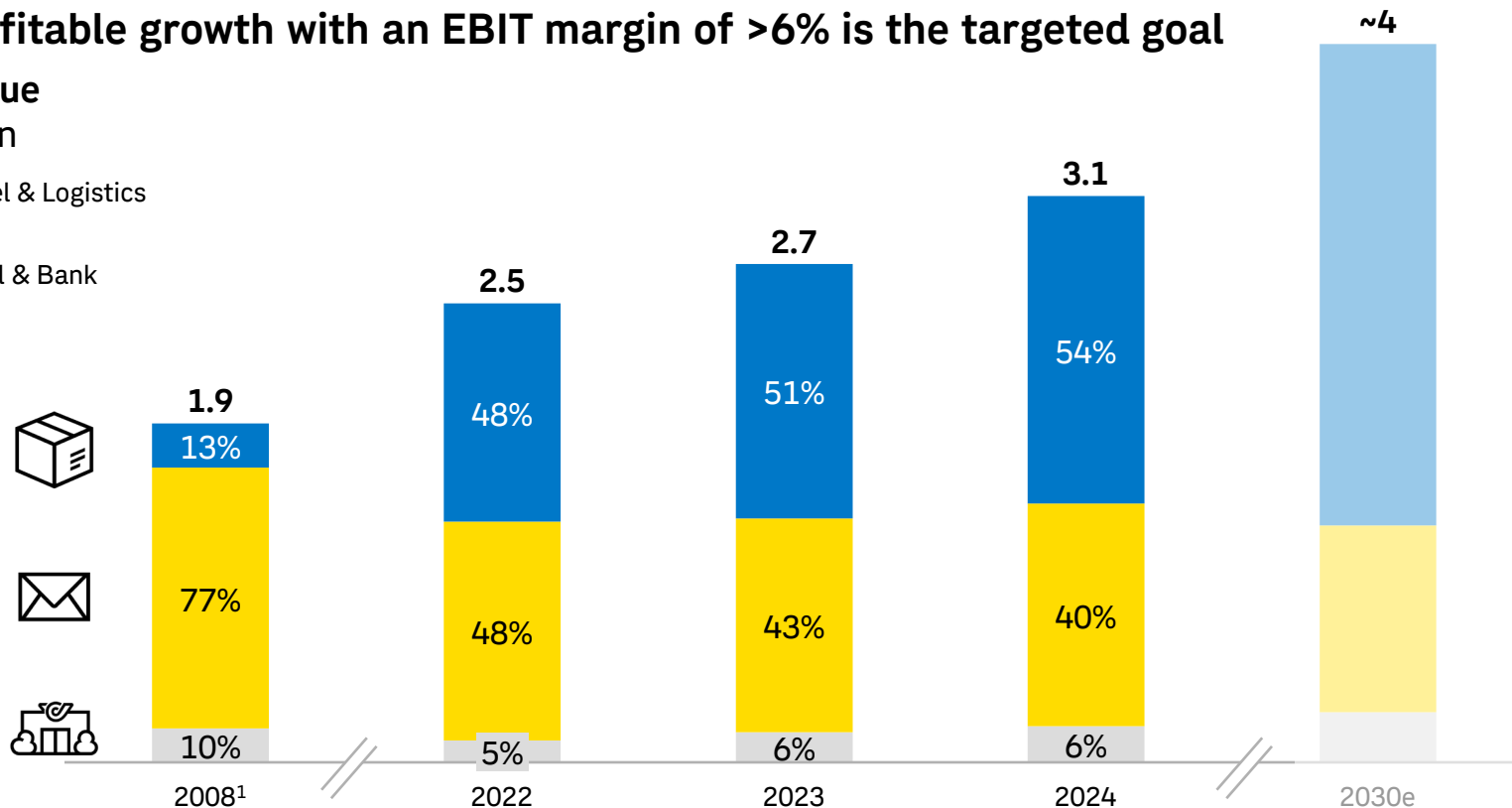
## Revenue

EUR bn

Parcel & Logistics

Mail

Retail & Bank



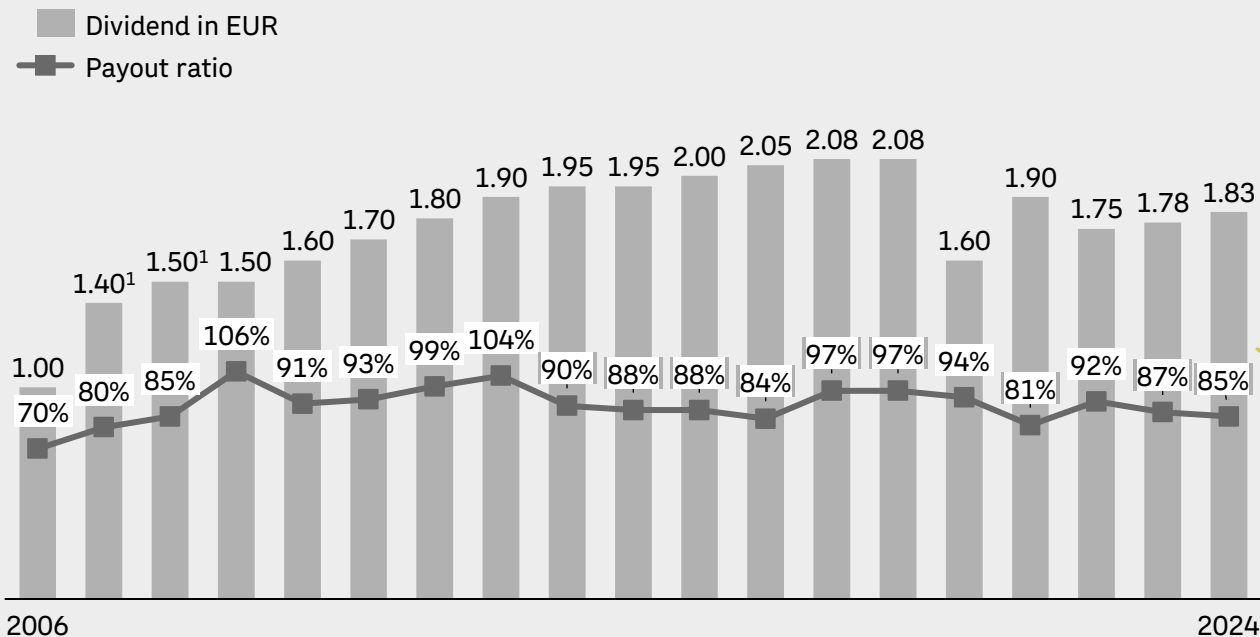
<sup>1</sup>Adjusted presentation – excl. trans-o-flex

# DIVIDEND POLICY



## Continuation of attractive and predictable dividend policy

### Dividends since IPO



<sup>1</sup> Excl. EUR 1.00 special dividend

**Reliable dividend policy**  
Distribution of at least 75%  
of the Group net profit





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## Financial calendar 2025/2026

12 November 2025	Interim Report Q1-3 2025
12 March 2026	Annual Report 2025
15 April 2026	Annual General Meeting
24/29 April 2026	Ex-day/Dividend payment day
08 May 2026	Interim Report Q1 2026
07 August 2026	Half-Year Report 2026
12 November 2026	Interim Report Q1-3 2026

### Disclaimer

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