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Oggetto : Consolidated 1H24 Financial Report

Testo del comunicato

Vedi allegato



PRESS RELEASE

Esautomotion approves the Consolidated 1H2025 Financial Report

1. **REVENUES:** € 15,220 thousand vs. € 14,096 thousand (+8.0%)
2. **EBITDA:** € 2,722 thousand vs. € 2,377 thousand (+14.6%)
3. **EBITDA: margin:** 17,9% vs. 16,9%
4. **EBIT:** €1,389 million vs. €1,287 million (+7.9%)
5. **NET PROFIT:** € 739 thousand vs. € 800 thousand (-7.6%) equal to 4,9% of revenues
6. **OPERATING CASH FLOW:** € 1,234 mila with a *cash conversion ratio* of 45.3%
7. **NET FINANCIAL POSITION:** € - 3.06 million (positive cash) vs. € -4.7 million at 31 December 2024, despite an investment of € 1.6 million in a new real estate complex.
8. **SHAREHOLDERS' EQUITY:** € 30,597 thousand, including the profit for the period of € 739 thousand.
9. **TREASURY SHARES HELD BY NO. 213,000**

Carpi, 18 September 2025

The Board of Directors of Esautomotion S.p.A. ("Esautomotion" or the "Company"), the operating *holding company* of the Esautomotion Group (the "**Group**"), active in the sector of high-precision mechatronic components for industrial machinery, today approved the Consolidated Half-Year Financial Report as at 30 June 2025 (the "**Report**").

REPORT: MAIN CONSOLIDATED RESULTS AS AT 30 JUNE 2025

Group REVENUES, amounting to € 15,220 thousand, recorded an increase of approximately +8.0% compared to the first half of 2024.

This positive result was achieved despite the persistence of global headwinds, including:

1. **High macroeconomic uncertainty**, which generated a negative economic situation in almost all markets, with a contraction in orders for durable goods and investments;
2. **An unstable and unpredictable geopolitical environment**, characterized by tensions in some areas, trade restrictions, potential effects of US tariffs and increasing competitive pressure from China.

These dynamics have led to a slowdown in the collection of orders from our historical customers – often leaders in their respective sectors and representative of the overall market trend –

which are showing signs of moderate recovery, while remaining on average below the production levels recorded in 2023.

The number of new customers acquired in the three-year period 2023-2025 is growing, and after the initial phase of adoption of Numerical Control technology (typically 1-3 years), they are now gradually becoming fully operational, contributing significantly to order intake and revenues, and will continue to support growth in the coming years.

EBITDA, amounting to € 2,722 thousand, increased by 14.6% compared to 1H2024.

The **EBITDA MARGIN**, at 17.9%, increased by 1.0 percentage points compared to 1H2024.

NET PROFIT, amounting to € 739 thousand, decreased by 7.6% compared to 1H2024.

The **NET FINANCIAL POSITION**, amounting to € -3.06 million (POSITIVE CASH), vs. € -4.7 million at 31 December 2024, includes the effects of an investment of € 1.6 million in a new real estate complex. The investment is aimed at replacing the current leased facility, with the aim of improving production processes and supporting future expansion of production capacity.

The share of *direct exports* is equal to 50%, to which must be added the part of products sold in Italy that are subsequently exported, making **the total export share estimated at 75%**.

The strategy of

1. Growth through external lines, seizing the opportunities generated by the current economic phase;
2. Investments in R&D aimed at the launch of new products;
3. Reduction of the cost of products by leveraging economies of scale and optimization of the supply chain;
4. Optimization of the use of working capital;
5. Enhancement of product performance, with particular focus on strategic applications (sheet metal, marble, wood processing);
6. Greater penetration with strategic customers, increasing market share compared to competitors;
7. Expansion of the offer towards complementary applications, including motors and drives;
8. Internationalization at a global level, with a focus on China, Turkey, Germany and North America.

R&D remains the Group's largest area of investment. Research and development activities continued in the first half of 2025, mainly aimed at integrating the following:

1. different mechatronic technologies; development of communication logics 4.0, 5.0 and *networking*;
2. increase in the flexibility characteristics of the product to react quickly to market fluctuations;
3. development and integration of new devices, sensors, components;
4. development of new *hardware* to deal with material *shortages* ;
5. improvement of energy efficiency;

6. study of 3D graphic elements;
7. hybrid technologies;
8. multifunction machines for increased productivity;
9. integrations with CAD/CAM programs.
10. integration of AI elements

These activities have allowed Esautomation to continue the development of *software* and new integrated devices according to the principles of *Industry 4.0*, *Industry 5.0* and *AI* as well as to consolidate the performance of existing products in new application sectors.

Outlook for the year: revenues after June and order flow continue to

show positive signs of growth. As regards the economic situation, it is not prudent to expect significant reversals in the short term.

The company has always reacted to possible fluctuations in demand by intensifying activities aimed at increasing market share, through:

1. technological innovation, to stimulate the renewal of the machine park in countries where automation is already consolidated and, at the same time, accelerate the transition to CNC machines in low-penetration markets, leveraging superior performance;
2. Ability to attract highly developed automation markets (China and Turkey in the first place, but also new emerging areas deriving from decoupling such as India and South America), thanks to a high level of service and strong competitiveness even in the less advanced but high-volume product ranges, considering the speed with which these markets tend to migrate, by emulation, towards more advanced technologies.
3. Development in potential areas of *reshoring*, particularly in the United States.
4. Expansion of the offer of products and services.
5. The acquisition of Sangalli Servomotori S.r.l completed in July 2023 and the strengthening of production capacity and efficiency, as well as integrating a strategic supplier (of which 32% of production was already destined for Esautomation), has opened the Group to new and promising market areas. After a 2024 in sharp decline compared to 2023, the company recorded an increase of 51% in 1H25 compared to 1H24.

Gianni Senzolo, CEO of Esautomation commented on the results: "*We have not lost any customers, and as in the post 2020, we expect to benefit from all the positive part of the cycle, as soon as it begins. We have never stopped acquiring new customers and we expect incremental growth from them in the coming years. The integration with the acquired company Sangalli Servomotori S.r.l. will allow us to strengthen our position in our markets and to expand Esautomation's growth horizon with new sectors.*"

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The Report, together with the certification of the independent auditors that will be issued in the coming days, will be made available to the public, in compliance with the terms provided for by law, on the [website http://www.esautomation.it](http://www.esautomation.it).

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With reference to the accounting data presented in this press release, it should be noted that these are data for which the statutory audit activity has not been completed by the independent auditors.

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Esautomotion Group results to the 30th June 2025 - Consolidated Income Statement IAS / IFRS

PROFIT & LOSS	30-jun-25		30-jun-24		Changes	
Thousands Euro						
Net Sales Revenues	15.092	99,2%	14.028	99,5%	1.064	7,6%
Other Revenues	128	0,8%	68	0,5%	60	89,6%
TURNOVER	15.220	100,0%	14.096	100,0%	1.124	8,0%
Cost of Goods Sold	(7.686)	(50,5%)	(6.691)	(47,5%)	(995)	14,9%
Personnel Costs	(2.260)	(14,8%)	(2.179)	(15,5%)	(81)	3,7%
Services	(2.419)	(15,9%)	(2.735)	(19,4%)	316	(11,6%)
Other Costs	(133)	(0,9%)	(114)	(0,8%)	(19)	17,2%
OPERATIVE COSTS	(12.498)	(82,1%)	(11.719)	(83,1%)	(779)	6,6%
Non recurring Costs	-		129			
EBITDA Adjusted	2.722	17,9%	2.248	15,9%	474	21,1%
EBITDA	2.722	17,9%	2.377	16,9%	345	14,5%
Depreciation and Amortization	(1.333)	(8,8%)	(1.090)	(7,7%)	(243)	22,3%
EBIT	1.389	9,1%	1.287	9,1%	102	7,9%
Financial Incomes (Costs)	(269)	(1,8%)	(136)	(1,0%)	(133)	97,4%
EBT	1.120	7,4%	1.151	8,2%	(31)	(2,7%)
Tax	(381)	(2,5%)	(351)	(2,5%)	(30)	8,5%
NET PROFIT (LOSS) Adjusted	739	4,9%	893	6,3%	(154)	(17,2%)
NET PROFIT (LOSS)	739	4,9%	800	5,7%	(61)	(7,6%)

Esautomotion Group results to the 30th June 2025 - Consolidated Balance Sheet IAS/IFRS

BALANCE SHEET		30-jun-25	31-dec-24	Changes
Thousands Euro				
	Goodwill	2.737	2.737	-
	Intangible Assets	2.439	2.543	(104)
	Tangible Assets	2.798	2.723	75
	Rights of use	2.042	929	1.113
	Other non current assets	1	1	-
A	Non Current Assets	10.017	8.933	1.084
	Inventory	11.602	12.273	(671)
	Trade Credits	9.240	8.757	483
	Accounts payable	(3.217)	(4.004)	787
	OPERATING WORKING CAPITAL	17.625	17.026	599
	Other current assets	1.602	941	661
	Other current debts	(1.285)	(1.021)	(264)
B	Net Working Capital	17.942	16.946	996
	Severance pay	(340)	(339)	(1)
	Funds for risk and charges	(87)	(87)	-
C	Total Funds	(427)	(426)	(1)
D=A+B+C	Net Invested Capital	27.532	25.453	2.079
E	Assets held for sale	-	-	-
F=D+E	Total Net Invested Capital	27.532	25.453	2.079
	Share Capital	2.000	2.000	-
	Accumulated profit and reserves	28.387	27.915	472
	Minority interest	210	216	(6)
G	Total Equity	30.597	30.131	466
	Long term financial Debts	5.440	4.198	1.242
	Short term financial Debts	423	506	(83)
	Cash, Bank Deposits and Financial credits	(8.928)	(9.382)	454
H	Net Financial Position	(3.065)	(4.678)	1.613
I=G+H	Total Sources	27.532	25.453	2.079

Esautomotion Group results to the 30th June 2025 - Consolidated Cash Flow Statement IAS/IFRS

CASH FLOW STATEMENT		30-jun-25	30-jun-24
		Thousands Euro	
Net Profit (Loss)		739	800
Corporate Income Taxes		381	351
Financial Costs (Income) & Exchange gains (losses)		268	136
Offset in working capital		248	13
Provisions		(3)	24
Depreciation		1.074	1.047
Cash flow from operation before changes in NWC		2.707	2.371
Changes in NWC		(1.473)	468
Cash flow after changes in NWC		1.234	2.840
Financial Costs paid		(7)	(12)
Taxes paid		(191)	(195)
Operating cash flow		1.036	2.633
CAPEX		(4.876)	(2.034)
Loan disbursement (repayment)		1.159	386
Increase in capital		-	-
Share Buyback		-	-
Changes in Equity		(273)	40
Dividends paid		-	(645)
Financial Changes		886	(219)
Changes in Liquidity		(2.954)	380
Cash beginning of the year		9.382	7.959
Cash at the end of the period		6.428	8.339

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Ticker: ESAU

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For more information

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