

CONFERENCE CALL PRELIMINARY RESULTS JAN. – JUNE 2019, REVISED OUTLOOK 2019

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www.durr-group.com





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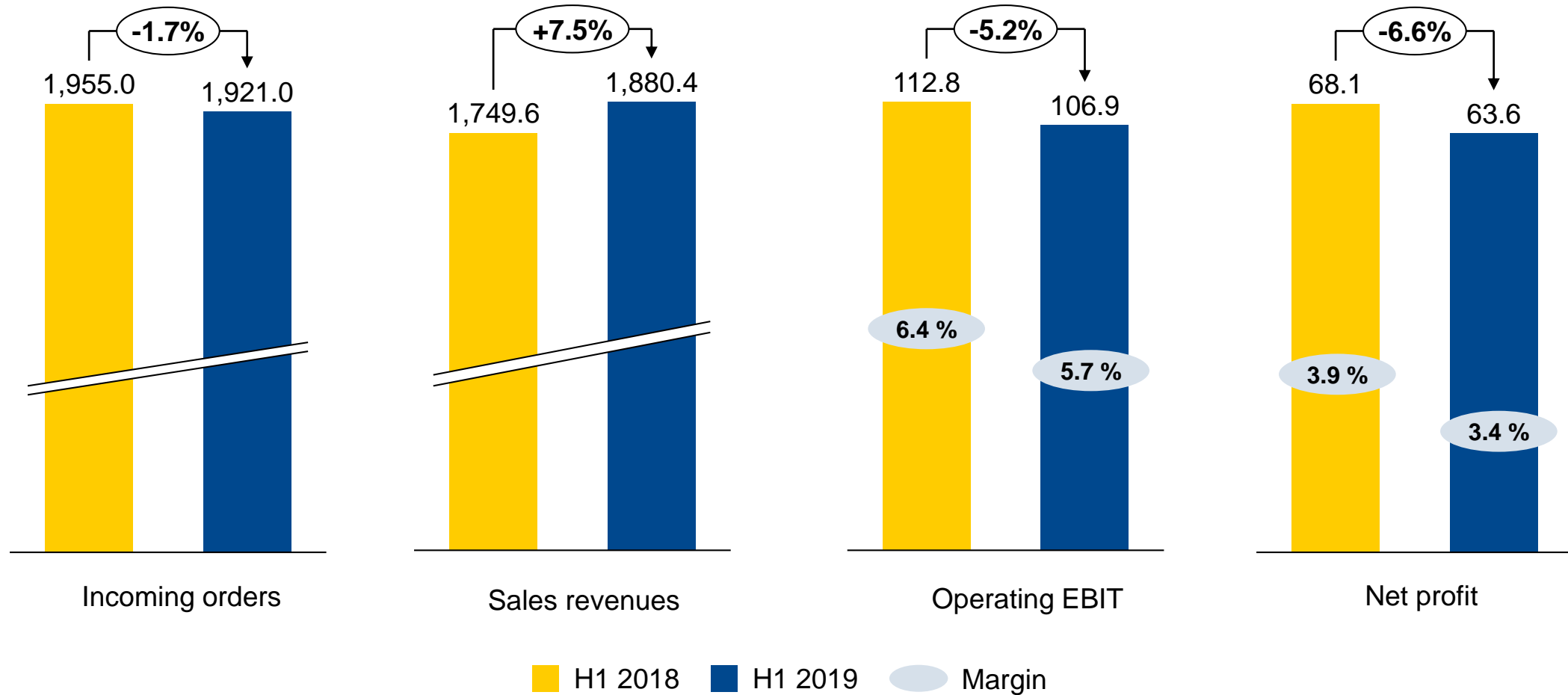
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- » Sales up 8% and incoming orders nearly unchanged in H1 2019 despite challenging market conditions
- » Book-to-bill at 1, order backlog at € 2.6 bn and slightly above the level of year end 2018
- » Service business (+15%) well on track
- » Moderate earnings development in H1 (EBIT -6%)
- » Increased competitive pressure in all divisions, but cost cutting measures, productivity improvements, and lower extraordinary costs will lead to an earnings improvement in H2 2019
- » Cash flow disappointing in H1 2019 mainly due to further delays in customer payments, but clear improvement in H2 2019 expected
- » Paint and Final Assembly Systems, Application Technology and Clean Technology Systems are well on track to reach their 2019 targets
- » Order intake at Measuring and Process Systems improved in H1 2019, this will lead to higher sales in H2 2019. But higher R&D costs, increased competition and weaker demand in the conventional powertrain business are weighing on results
- » Strong decline in HOMAG's high margin business in China for two years in a row. HOMAG's outlook reduced due to an unexpected lower business volume in H2 2019

OVERVIEW

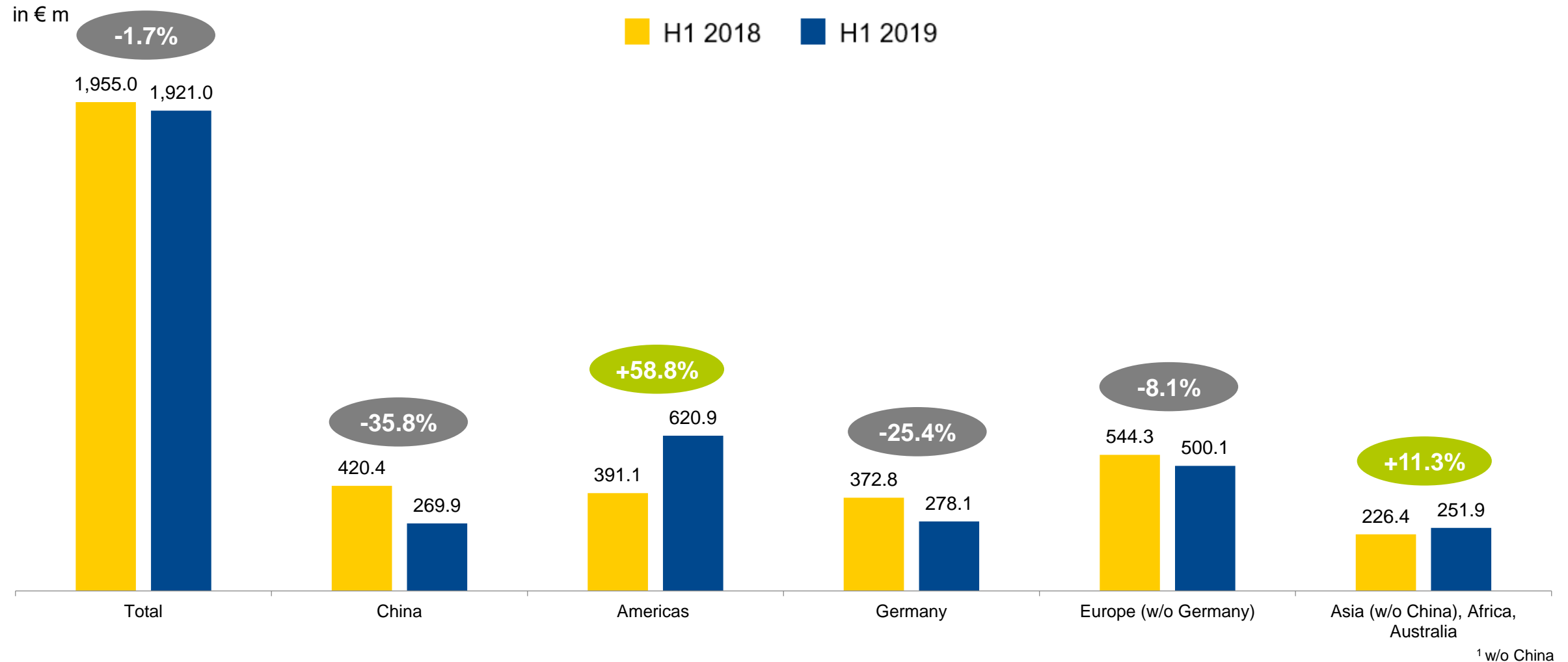
6 months 2019 vs. 6 months 2018

in € m



ORDER GROWTH IN NORTH AMERICA + EMERGING MARKETS¹

Declining demand in China only temporary, promising pipeline in H2 2019



H1 2019: SLIGHT INCREASE IN GROSS PROFIT

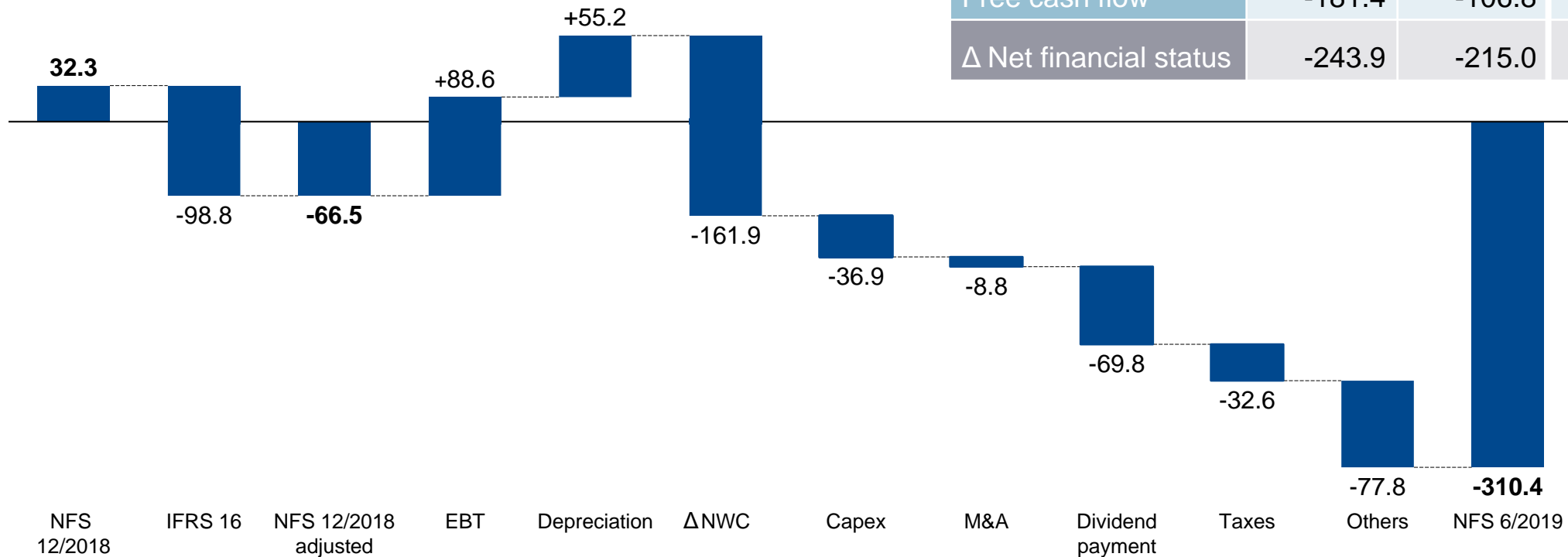
	H1 2019	H1 2018	Δ	Q2 2019	Q2 2018	Δ
Gross profit on sales in € m	414.1	404.1	2.5%	207.7	205.5	1.1%
Gross margin in %	22.0	23.1	-1.1 pts	22.3	22.6	-0.3 pts
EBITDA in € m	150.4	140.9	6.8%	74.7	69.8	7.0%
EBIT in € m	95.2	101.4	-6.1%	46.6	50.3	-7.4%
EBIT before extraordinary effects in € m	106.9	112.8	-5.2%	52.3	56.0	-6.5%
EBIT margin in %	5.1	5.8	-0.7 pts	5.0	5.5	-0.5 pts
EBIT margin before extraordinary effects in %	5.7	6.4	-0.7 pts	5.6	6.2	-0.6 pts
Net income in € m	63.6	68.1	-6.6%	30.6	33.6	-8.9%

- » Gross margin declined to 22.0% (H1 2018: 23.1%) due to higher production costs (e.g. wages, material costs) and increased competitive pressure
- » Extraordinary effects of € -11.7 m (H1 2018: € -11.4 m), thereof € -10.0 m purchase price allocation effects
- » Strong increase in selling expenses: +15% (e.g. various exhibitions such as Ligna, Open House); decline in H2 to be expected

6 MONTHS 2019 CASH EVOLUTION

Further delays in customer payments affecting NWC and NFS development.
Improvement in H2 2019 expected

in € m



in € m	H1 2019	H1 2018	Q2 2019	Q2 2018
Operating cash flow	-112.9	-59.1	-69.9	16.6
Free cash flow	-181.4	-106.8	-115.4	-10.4
Δ Net financial status	-243.9	-215.0	-174.7	-123.2

NWC: UNSATISFACTORY LEVEL IN H1

Inventories unchanged compared to 6/30/2018

in € m	06/30/2019	12/31/2018	06/30/2018
Materials and supplies (net)	238.5	230.2	226.4
+ Work in process from small series production	128.0	119.8	131.2
+ Finished goods and merchandise (net)	155.6	141.9	140.0
+ Prepayments to suppliers	43.0	43.5	73.7
= Inventories and prepayments	565.1	535.4	571.3
+ Total trade receivables	578.3	603.0	544.3
+ Total contract assets	504.3	478.3	505.9
- Trade payables (incl. liabilities from notes payable)	510.1	502.4	436.9
- Total contract liabilities	534.2	673.0	731.8
= Net working capital	603.4	441.4	452.9

included in total balance (total work in process less billings)

WORK IN PROCESS BALANCE

Shortfall in customer payments main cause for current NWC development

in € m	06/30/2019	12/31/2018	06/30/2018
Assets			
Total contract assets	504.3	478.3	505.9
Work in process from small series production	128.0	119.8	131.2
Liabilities			
Total contract liabilities	534.2	673.0	731.8
Total balance (Total work in process less billings)	98.1	-74.8	-94.6

» FY goal 2019 unchanged: Total balance between € 0 and -100 m

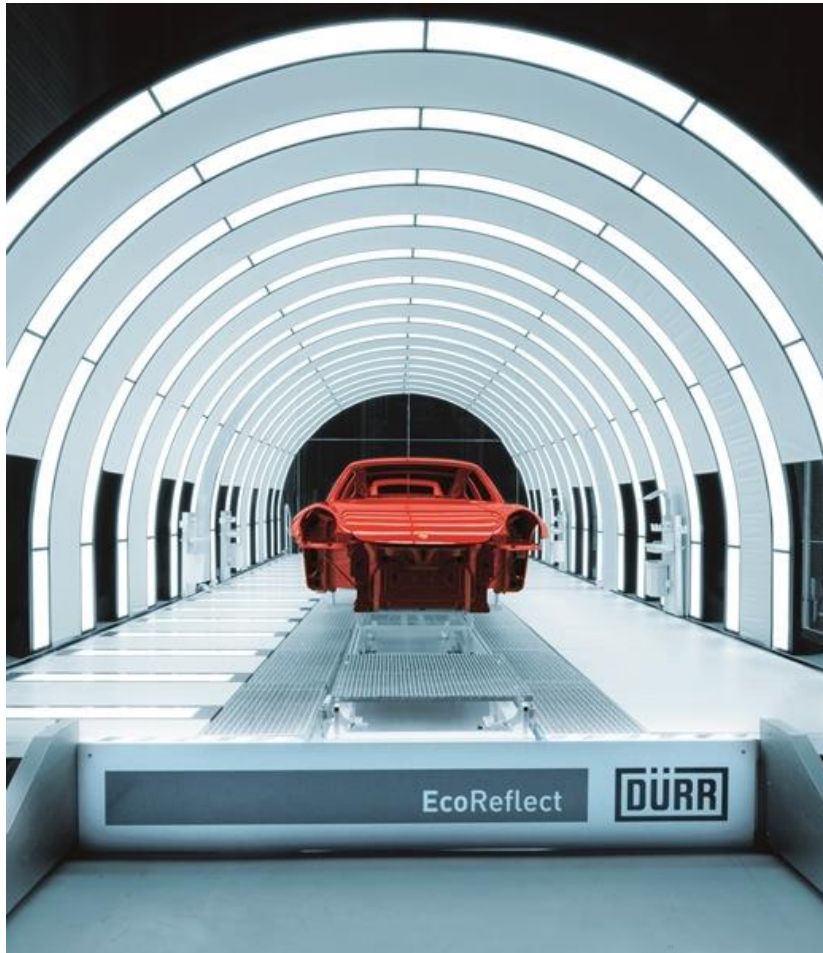
EQUITY RATIO GETTING CLOSER TO 30%

	06/30/2019	12/31/2018	06/30/2018
Equity in € m	987.8	992.2	886.8
Equity ratio in %	28.2	27.4	25.5
Net financial status in € m	-310.4	32.3	-38.7
Cash in € m	409.0	655.0	472.2
Gearing in %	23.9	-3.4	4.2
ROCE ¹ in %	14.5	24.0	21.6

- » Equity up 11% yoy
- » Net financial status expected to improve during the next quarters
- » ROCE expected between 15 and 20% in FY 2019, well above cost of capital

¹ annualized

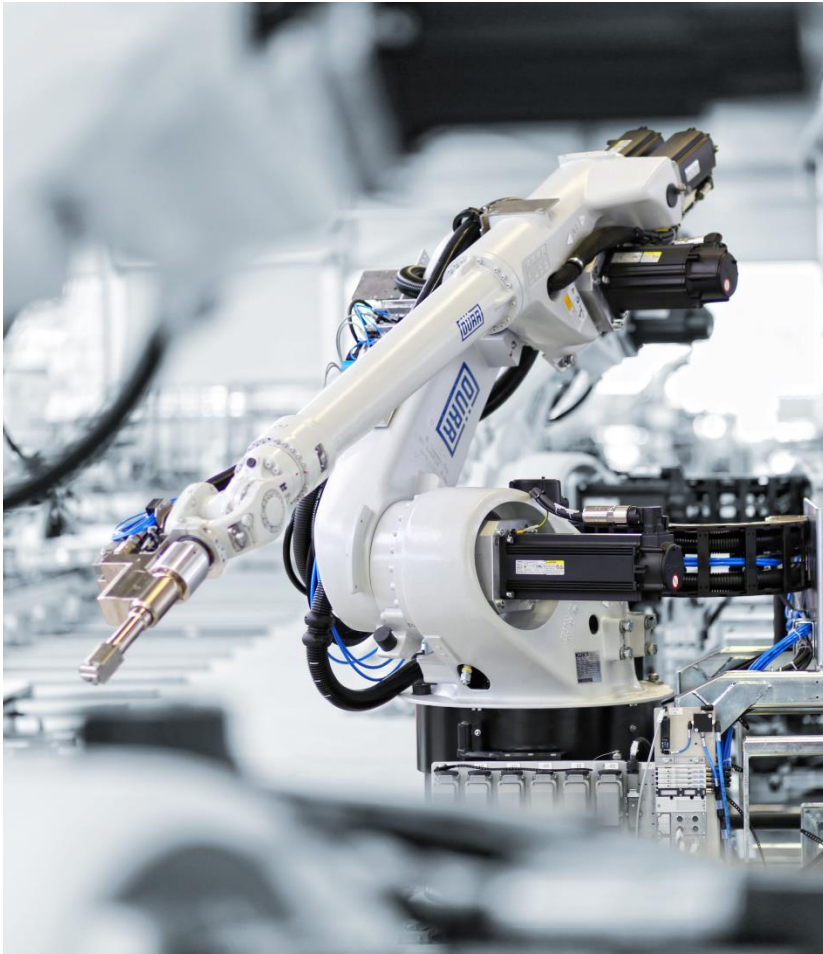
PAINT AND FINAL ASSEMBLY SYSTEMS



	H1 2019	H1 2018	Δ	Q2 2019	Q2 2018	Δ
Incoming orders in € m	588.5	577.5	1.9%	194.4	303.3	-35.9%
Sales revenues in € m	604.7	567.3	6.6%	293.6	297.1	-1.2%
EBIT in € m	24.6	24.9	-1.4%	11.9	12.5	-4.5%
EBIT margin in %	4.1	4.4	-0.3 ppts	4.1	4.2	-0.1 ppts
ROCE ¹ in %	28.1	83.7	-55.6 ppts	27.3	83.8	-56.5 ppts

- » Stable order intake in H1 (e.g. Mexico, India), project pipeline unchanged at a good level
- » Ongoing improvement in order intake margin due to improved cost position (FOCUS 2.0)
- » EBIT at previous year level; EBIT margin decline due to billing of elder low margin orders
- » Unchanged outlook due to billing of higher margin orders in H2 2019

¹ annualized



	H1 2019	H1 2018	Δ	Q2 2019	Q2 2018	Δ
Incoming orders in € m	305.0	345.1	-11.6%	145.5	176.6	-17.6%
Sales revenues in € m	271.7	298.0	-8.8%	132.3	152.5	-13.3%
EBIT in € m	27.8	30.7	-9.5%	13.2	15.5	-15.2%
EBIT margin in %	10.2	10.3	-0.1 pts	10.0	10.2	-0.2 pts
ROCE ¹ in %	17.2	24.3	-7.1 pts	16.3	24.6	-8.3 pts

- » Moderate start in H1, but healthy project pipeline
- » Weaker growth in service business due to lower utilization of automotive factories, but higher margins in incoming orders
- » EBIT margin at 10.2% despite sales decline
- » Book-to-bill at 1.1

¹ annualized



	H1 2019	H1 2018	Δ	Q2 2019	Q2 2018	Δ
Incoming orders in € m	208.0	116.5	78.6%	95.5	58.8	62.3%
Sales revenues in € m	180.3	65.0	177.4%	92.1	34.7	165.0%
EBIT in € m	0.7	-2.5	-	1.4	-1.6	-
EBIT margin in %	0.4	-3.9	4.3 ppts	1.5	-4.5	6.0 ppts
ROCE ¹ in %	0.8	-7.1	7.9 ppts	3.3	-8.8	12.1 ppts

- » H1 figures influenced by consolidation of Megtec/Universal
- » Sales nearly tripled
- » Book-to-bill at 1.2
- » Q2 earnings strongly improved
- » Successful integration of Megtec/Universal progressing as planned

¹ annualized

MEASURING AND PROCESS SYSTEMS



	H1 2019	H1 2018	Δ	Q2 2019	Q2 2018	Δ
Incoming orders in € m	228.6	214.6	6.5%	123.5	111.1	11.1%
Sales revenues in € m	186.9	213.5	-12.5%	95.1	114.2	-16.7%
EBIT in € m	12.8	23.9	-46.3%	6.0	13.5	-55.5%
EBIT margin in %	6.9	11.2	-4.3 pts	6.3	11.8	-5.5 pts
ROCE ¹ in %	8.9	18.0	-9.1 pts	8.3	20.3	-12.0 pts

- » Order intake in Q2 11% above previous year's level
- » Sales decline due to weaker incoming orders in H2 2018
- » Strong decline in conventional powertrain business (e.g. turbochargers, crankshafts)
- » Earnings affected by sales decline and higher R&D costs (digital innovations)
- » Sales and earnings improvement expected in H2 2019 due to high order backlog

¹ annualized



	H1 2019	H1 2018	Δ	Q2 2019	Q2 2018	Δ
Incoming orders in € m	590.8	701.3	-15.8%	256.2	286.1	-10.4%
Sales revenues in € m	636.8	605.7	5.1%	317.5	311.1	2.1%
EBIT in € m	35.0	37.2	-5.8%	16.7	17.4	-4.5%
EBIT margin in %	5.5	6.1	-0.6 pts	5.2	5.6	-0.4 pts
ROCE ¹ in %	14.0	16.3	-2.3 pts	13.3	15.3	-2.0 pts

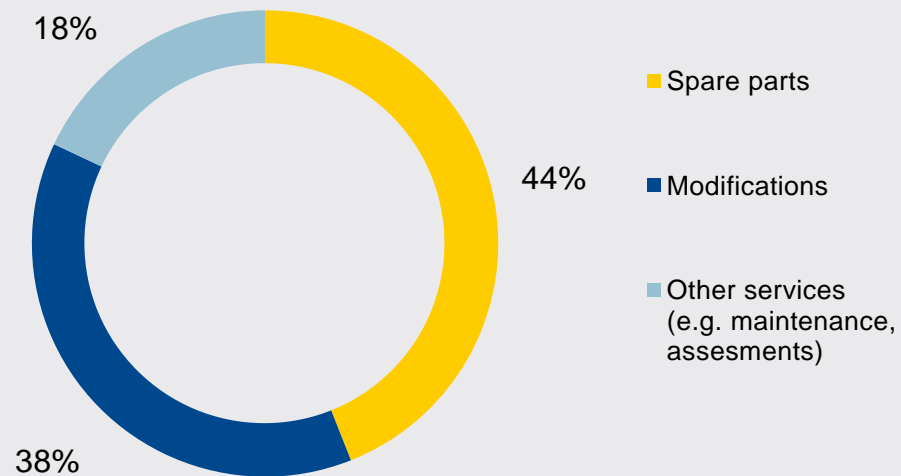
- » Order intake 16% below record level of H1 2018; Q2 weaker than expected
- » High margin business in China significantly declining: sales halved to € 48 m
- » Earnings decline due to stronger price competition, underutilization at some locations and higher production costs (e.g. wages, material costs)
- » Cost reduction program intensified, cost situation to improve in H2

¹ annualized

SERVICE BUSINESS: STRONG EXPANSION OF 15%

All divisions posting sales growth

Service mix 6 months 2019



	H1 2019	H1 2018	Δ
Sales revenues in € m	527.2	460.5	14.5%
% of group sales	28.0	26.3	1.7 ppts

- » Margin level slightly declined but still very healthy
- » Service business expected to expand steadily during the next quarters
- » Exceptional growth rate in H1

TARGETS 2019

Sales and order intake outlook unchanged; new operating margin guidance on the safe side

	Actual 2018	Target 2019 old	Target 2019 new
Incoming orders in € m	3,930.9	3,800 - 4,100	3,800 - 4,100
Orders on hand in € m (12/31)	2,577.2	2,400 - 2,900	2,400 - 2,900
Sales revenues in € m	3,869.8	3,900 - 4,100	3,900 - 4,100
EBIT margin in %	6.0	6.5 - 7.0	5.5 - 6.0
EBIT margin before extraordinary effects in %	7.1	7.0 - 7.5	6.0 - 6.5
ROCE in %	24.0	20 - 30	15 - 20
Net finance expense in € m	-13.8	deterioration	deterioration
Tax rate in %	25.6	27 - 28	27 - 28
Earnings after tax in € m	163.5	175 - 190	145 - 160
Cash flow from operating activities in € m	162.3	up on the previous year	down on the previous year
Free cash flow in € m	78.4	up on the previous year	down on the previous year
Net financial status ¹ in € m (12/31)	32.3	-60 - -20	-180 - -130
Liquidity in € m (12/31)	655.0	660 - 700	740 - 790
Capital expenditure ² in € m	74.4	80 - 90	80 - 90

¹ Due to the first-time application of IFRS 16 "Leases", we expect a negative effect of around € 100 m on net financial status in 2019.

² in property, plant and equipment and intangible assets (excluding acquisitions)

TARGETS DIVISIONS 2019

	Order intake (in € m)			Sales (in € m)			EBIT margin (in %)		
	2018	Target old 2019	Target new 2019	2018	Target old 2019	Target new 2019	2018	Target old 2019	Target new 2019
Paint and Final Assembly Systems	1,300.4	1,100 - 1,300	1,100 - 1,300	1,235.7	1,200 - 1,300	1,200 - 1,300	4.5	4.6 - 5.5	4.6 - 5.5
Application Technology	632.4	620 - 670	620 - 670	652.6	630 - 680	630 - 680	10.4	10.0 - 11.0	10.0 - 11.0
Clean Technology Systems	258.2	400 - 450 ¹	400 - 450 ¹	226.7	400 - 450 ¹	400 - 450 ¹	-6.6	2.0 - 3.0 ¹	2.0 - 3.0 ¹
Measuring and Process Systems	403.3	400 - 450	400 - 450	456.5	400 - 450	400 - 450	13.1	11.5 - 12.5	10.0 - 11.0
Woodworking Machinery and Systems	1,336.8	1,250 - 1,450	1,100 - 1,300	1,298.3	1,280 - 1,380	1,200 - 1,300	6.6	6.7 - 7.5	5.5 - 6.3

¹ Consolidation of Megtec/Universal for 12 months

Appendix

BALANCE SHEET HIGHLIGHTS (1/2)

Assets in € m	06/30/2019	12/31/2018	06/30/2018
Non-current assets	1,303.0	1,244.3	1,112.3
of which goodwill & intangibles	645.2	651.3	586.2
of which property, plant and equipment	516.6	433.8	410.2
of which investment & financial assets	70.1	65.1	65.8
Current assets	2,201.3	2,370.1	2,360.5
of which inventories and prepayments	565.1	535.4	571.3
of which contract assets	504.3	478.3	505.9
of which trade receivables	564.9	566.7	540.9
of which sundry financial assets	52.4	52.4	159.7
of which cash and cash equivalents	409.0	655.0	472.2
Total assets Dürr Group	3,504.4	3,614.4	3,472.9

BALANCE SHEET HIGHLIGHTS (2/2)

Equity and liabilities in € m	06/30/2019	12/31/2018	06/30/2018
Total equity	987.8	992.2	886.8
of which non-controlling interests	14.2	14.9	13.9
Non-current liabilities	855.2	786.1	784.1
of which provisions	72.5	69.1	69.5
of which bond and bonded loan	598.3	598.0	597.6
of which other financial liabilities	80.6	12.8	11.8
of which deferred taxes	90.4	91.9	86.8
Current liabilities	1,661.3	1,836.2	1,802.0
of which other provisions	118.3	130.7	135.6
of which contract liabilities	532.1	670.8	727.9
of which trade payables	509.4	501.4	435.7
of which sundry financial liabilities	294.6	347.7	321.7
of which other liabilities	135.9	142.3	140.6
Total equity and liabilities Dürr Group	3,504.4	3,614.4	3,472.9

P&L IN DETAIL

in € m	H1 2019	H1 2018	Δ	Q2 2019	Q2 2018	Δ
Sales revenues	1,880.4	1,749.6	7.5%	930.5	909.5	2.3%
Cost of sales	-1,466.3	-1,345.5	9.0%	-722.8	-704.1	2.7%
Gross profit on sales	414.1	404.1	2.5%	207.7	205.5	1.1%
Selling expenses	-169.1	-147.2	14.9%	-86.6	-76.2	13.6%
General administrative expenses	-92.6	-90.1	2.8%	-45.6	-46.3	-1.4%
Research and development costs	-58.3	-61.3	-4.9%	-29.2	-30.4	-4.1%
Other operating income	12.0	17.3	-30.6%	4.3	7.5	-42.1%
Other operating expenses	-11.0	-21.5	-48.7%	-4.0	-9.7	-58.4%
Earnings before investment income, interest and income taxes	95.2	101.4	-6.1%	46.6	50.3	-7.4%
Investment income	2.8	3.6	-21.1%	0.9	3.0	-71.0%
Interest and similar income	3.2	3.3	-2.6%	1.6	0.7	114.2%
Interest and similar expenses	-12.7	-14.0	-9.5%	-6.3	-7.5	-15.8%
Earnings before income taxes	88.6	94.3	-6.1%	42.7	46.5	-8.3%
Income taxes	-25.0	-26.2	-4.6%	-12.1	-12.9	-6.7%
Profit of the Dürr Group	63.6	68.1	-6.6%	30.6	33.6	-8.9%
Attributable to:						
Non-controlling interests	3.0	2.4	21.5%	1.1	1.5	-24.0%
Shareholders of Dürr Aktiengesellschaft	60.7	65.7	-7.7%	29.5	32.2	-8.2%
Number of shares issued in thousands	69,202.1	69,202.1	-	69,202.1	69,202.1	-
Earnings per share in € (basic and diluted)	0.9	1.0	-7.4%	0.4	0.5	-6.5%

CASH FLOW

in € m	H1 2019	H1 2018	Q2 2019	Q2 2018
EBT	88.6	94.3	42.7	46.5
Depreciation and amortization of non-current assets	55.2	39.5	28.1	19.5
Interest result	9.5	10.7	4.8	6.8
Income taxes paid	-32.6	-49.0	-22.9	-26.6
Δ Provisions	-10.2	-14.8	-5.7	-5.7
Δ Net working capital	-161.9	-82.3	-74.6	17.3
Other	-61.5	-57.4	-42.3	-41.3
Operating cash flow	-112.9	-59.1	-69.9	16.6
Interest paid (net)	-18.3	-13.0	-18.6	-5.0
Repayment lease liabilities	-13.3	-0.7	-7.4	-0.7
Capital expenditures	-36.9	-34.1	-19.5	-21.2
Free cash flow	-181.4	-106.8	-115.4	-10.4
Others (e.g. currency effects, dividends)	-62.4	-108.2	-59.3	-112.9
Change net financial status	-243.9	-215.0	-174.7	-123.2

OVERVIEW: FINANCIAL FIGURES BY DIVISION (1/2)

		2019					2018					2017				
		Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total
PFS	Incoming orders in € m	394.1	194.4			588.5	274.2	303.3	187.9	534.9	1,300.4	268.3	377.3	181.0	315.8	1,142.3
	Sales revenues in € m	311.1	293.6			604.7	270.2	297.1	311.2	357.1	1,235.7	275.4	256.4	284.5	358.9	1,175.2
	Order backlog in € m	1,321.6	1,203.9				1,150.1	1,164.5	1,033.9	1,216.4		1,242.0	1,329.6	1,211.2	1,148.4	
	EBIT in € m	12.7	11.9			24.6	12.4	12.5	14.0	17.0	56.0	17.0	13.9	16.0	23.4	70.4
	Employees	3,514	3,542				3,435	3,405	3,447	3,472		3,367	3,384	3,463	3,457	
APT	Incoming orders in € m	159.6	145.5			305.0	168.6	176.6	141.2	146.0	632.4	157.1	168.3	134.8	126.4	586.5
	Sales revenues in € m	139.4	132.3			271.7	145.5	152.5	174.1	180.5	652.6	134.2	152.7	160.4	175.1	622.4
	Order backlog in € m	391.5	400.7				407.3	433.0	398.3	366.5		461.3	467.7	436.9	384.2	
	EBIT in € m	14.6	13.2			27.8	15.2	15.5	17.4	19.9	68.0	13.9	15.5	17.2	18.2	64.8
	Employees	2,271	2,251				2,112	2,154	2,230	2,246		1,953	1,985	2,024	2,063	
CTS	Incoming orders in € m	112.6	95.5			208.0	57.6	58.8	36.3	105.3	258.2	56.6	38.6	27.8	41.9	164.9
	Sales revenues in € m	88.3	92.1			180.3	30.3	34.7	54.9	106.8	226.7	38.6	47.7	45.3	54.1	185.6
	Order backlog in € m	217.8	217.1				125.7	151.3	130.8	191.3		142.9	128.8	110.1	98.3	
	EBIT in € m	-0.7	1.4			0.7	-1.0	-1.6	-11.7	-0.7	-15.0	0.4	1.2	0.3	1.5	3.3
	Employees	1,443	1,427				601	600	612	1,472		573	586	596	603	
MPS	Incoming orders in € m	105.1	123.5			228.6	103.4	111.1	93.2	95.6	403.3	161.7	117.1	139.4	124.9	543.0
	Sales revenues in € m	91.9	95.1			186.9	99.4	114.2	112.6	130.4	456.5	145.4	105.2	131.1	129.4	511.1
	Order backlog in € m	217.0	242.9				260.0	258.1	236.0	201.5		256.4	262.1	269.1	257.6	
	EBIT in € m	6.8	6.0			12.8	10.4	13.5	14.1	21.8	59.7	14.4	15.7	17.6	16.7	64.3
	Employees	2,306	2,309				2,317	2,303	2,325	2,279		2,224	2,244	2,280	2,279	

OVERVIEW: FINANCIAL FIGURES BY DIVISION (2/2)

		2019					2018					2017				
		Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total
WMS	Incoming orders in € m	334.6	256.2			590.8	415.2	286.1	339.6	295.9	1,336.8	400.9	332.6	345.4	287.3	1,366.3
	Sales revenues in € m	319.2	317.5			636.8	294.6	311.1	331.6	361.0	1,298.3	296.8	301.2	305.8	315.0	1,218.8
	Order backlog in € m	622.0	557.6				676.4	657.6	666.3	601.6		534.0	555.8	591.0	560.9	
	EBIT in € m	18.4	16.7			35.0	19.7	17.4	21.5	27.6	86.2	20.3	23.4	22.1	17.2	83.0
	Employees	6,633	6,592				6,484	6,567	6,605	6,593		6,083	6,149	6,316	6,371	
CC / Cons.	Incoming orders in € m	0.0	0.0			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Sales revenues in € m	0.0	0.0			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
	Order backlog in € m	0.0	0.0				0.1	0.0	0.0	0.0		0.1	0.1	0.1	0.1	
	EBIT in € m	-3.1	-2.5			-5.6	-5.7	-7.0	-3.3	-5.4	-21.4	20.2	-8.8	-5.5	-4.7	1.2
	Employees	248	263				204	207	242	250		193	197	197	201	
Group	Incoming orders in € m	1,105.9	815.1			1,921.0	1,019.1	935.9	798.2	1,177.7	3,930.9	1,044.5	1,033.9	828.3	896.4	3,803.0
	Sales revenues in € m	949.9	930.5			1,880.4	840.1	909.5	984.5	1,135.8	3,869.8	890.3	863.2	927.1	1,032.5	3,713.2
	Order backlog in € m	2,769.8	2,622.2				2,619.6	2,664.6	2,465.4	2,577.2		2,636.7	2,744.2	2,618.3	2,449.4	
	EBIT in € m	48.6	46.6			95.2	51.1	50.3	51.9	80.2	233.5	86.2	60.9	67.7	72.2	287.0
	Employees	16,415	16,384				15,153	15,236	15,461	16,312		14,393	14,545	14,876	14,974	

OVERVIEW: EXTRAORDINARY EFFECTS

in € m

	2019					2018					2017				
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total
PFS	-1.0	-0.5			-1.5	-0.5	-0.5	-0.5	-0.5	-2.2	-0.5	-0.5	-0.5	-0.5	-2.2
APT	-0.1	0.0			-0.2	-0.1	-0.1	0.0	0.0	-0.2	-0.1	-0.1	-0.1	-0.2	-0.5
CTS	-1.9	-2.7			-4.6	-0.2	-0.2	-13.7	-6.1	-20.1	-0.2	-0.2	-0.2	-0.2	-0.7
MPS	-0.4	-0.3			-0.7	-0.5	-0.3	-0.4	-0.4	-1.5	-0.3	-0.3	-0.3	-1.4	-2.4
WMS	-2.2	-2.2			-4.3	-2.2	-2.2	-2.2	-2.2	-8.7	-2.2	-2.2	-2.2	-2.2	-8.7
CC	-0.3	0.0			-0.4	-2.3	-2.4	-0.5	-3.5	-8.7	22.7	-3.4	-0.9	-0.7	17.7
Total	-6.0	-5.7			-11.7	-5.7	-5.7	-17.3	-12.8	-41.4	19.4	-6.7	-4.2	-5.1	3.3

4. FINANCIAL CALENDAR

- » 08/07/2019 Interim statement 6 months 2019
- » 08/22/2019 Montega Investorentag, Hamburg
- » 08/28/2019 Commerzbank Sector Conference, Frankfurt
- » 09/06/2019 Morgan Stanley Industrial CEOs unplugged, London
- » 09/24/2019 Berenberg and Goldman Sachs German Corporate Conference, Munich
- » 09/25/2019 Baader Investment Conference, Munich
- » 11/07/2019 Interim statement 9 months 2019: Analysts/investors call

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CONFERENCE CALL PRELIMINARY RESULTS JAN. – JUNE 2019, REVISED OUTLOOK 2019

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Bietigheim-Bissingen, July 23, 2019

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