

CONFERENCE CALL RESULTS JAN. – MAR. 2019

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Bietigheim-Bissingen, May 17, 2019

www.durr-group.com



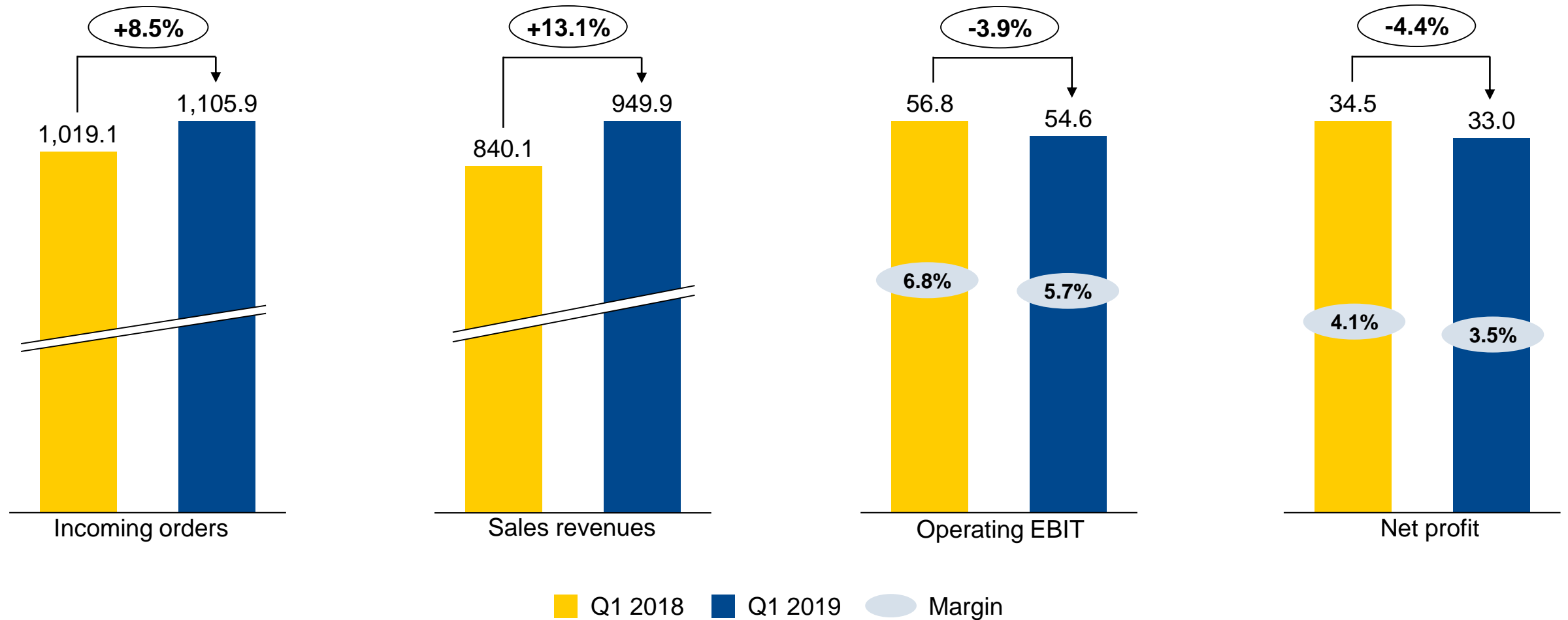


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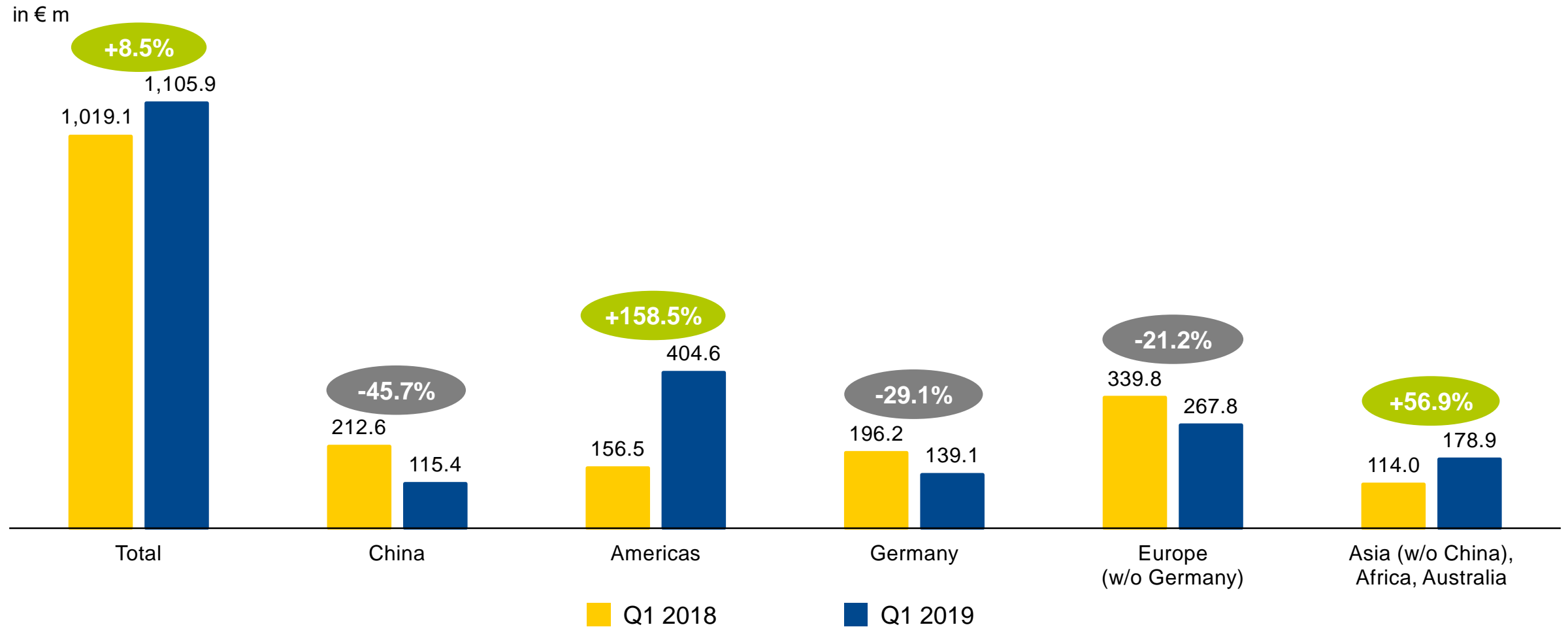
OVERVIEW: GROWTH IN ORDER INTAKE AND SALES

Q1 2019 vs. Q1 2018, in € m



ORDER GROWTH IN NORTH AMERICA + EMERGING MARKETS

Declining demand in China only temporary



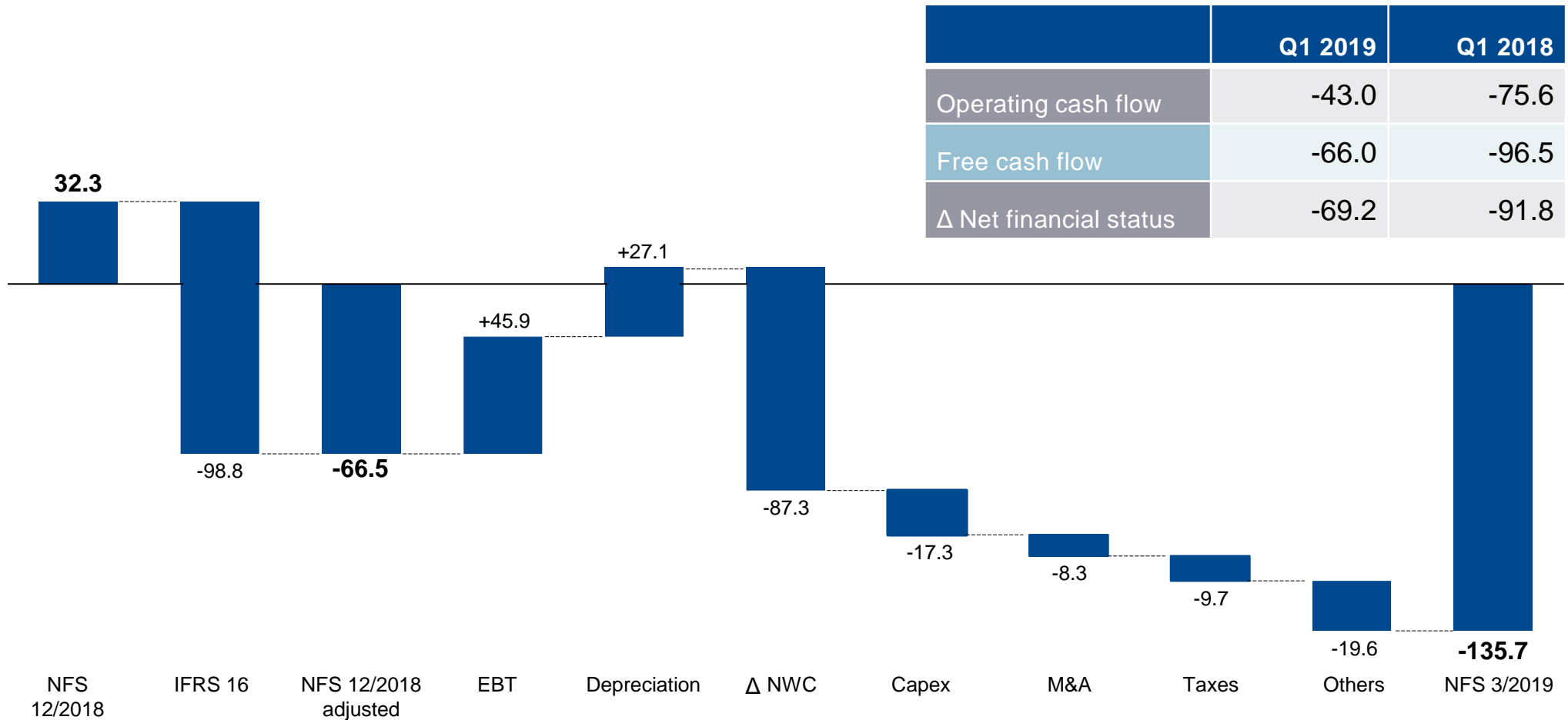
Q1 2019: SLIGHT INCREASE IN GROSS PROFIT

	Q1 2019	Q1 2018	Δ
Gross profit on sales in € m	206.4	198.6	3.9%
EBITDA in € m	75.7	71.1	6.5%
EBIT in € m	48.6	51.1	-4.8%
EBIT before extraordinary effects in € m	54.6	56.8	-3.9%
EBIT margin in %	5.1	6.1	-1.0 ppts
EBIT margin before extraordinary effects in %	5.7	6.8	-1.0 ppts
Net income in € m	33.0	34.5	-4.4%

- » Gross margin declined to 21.7% (Q1 2018: 23.6%) due to higher production costs (e.g. wages) and ongoing competitive pressure
- » Extraordinary effects of € -6.0 m in Q1 2019 (Q1 2018: € -5.7 m), thereof € -5.1 m purchase price allocation effects
- » Overhead costs (+9%) grew at a lower rate than sales (+13%)

Q1 2019 NET FINANCIAL STATUS (NFS) EVOLUTION

in € m



IFRS 16 „LEASES“ FIRST TIME APPLICATION → EFFECTS

in € m	Q1 2019	FY 2019e
Assets	+89	+89
Equity	-7	-7
Other liabilities	-3	-3
Financial liabilities	+99	+99
EBITDA	+7	+28
EBIT	+1	+3
Financial result	-1	-3
Operating cash flow	+6	+24
Free cash flow	0	0

NWC: UNSATISFACTORY LEVEL IN Q1, BUT DWC UNCHANGED

in € m	03/31/2019	12/31/2018	03/31/2018
Inventories and prepayments	556.0	535.4	530.6
+ Total trade receivables	605.1	603.0	508.3
+ Total contract assets	528.3	478.3	472.5
- Trade payables (incl. liabilities from notes payable)	546.3	502.4	388.1
- Total contract liabilities	612.7	673.0	653.8
= Net working capital	530.4	441.4	469.5
 DWC	 50.3	 41.1	 50.3

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

WORK IN PROCESS BALANCE: TEMPORARY SHORTFALL OF CUSTOMER PAYMENTS



in € m	03/31/2019	12/31/2018	03/31/2018
Assets			
Total contract assets	528.3	478.3	472.5
Work in process from small series production	125.0	119.8	122.3
Liabilities			
Total contract liabilities	-612.7	-673.0	-653.8
Total balance (Total work in process less billings)	40.5	-74.8	-59.0

» Total balance FY 2019e between € 0 and -100 m

ADJUSTED NET FINANCIAL STATUS



Strong improvement of NFS in Q1 on an adjusted basis

in € m	03/31/2019	12/31/2018	03/31/2018
Net financial status	-135.7	32.3	84.5
IFRS 16	-	-98.8	-98.8
Total balance (Total work in process less billings)	40.5	-74.8	-59.0
Adjusted net financial status	-95.2	-141.3	-73.3

- » Adjusted net financial status declined by € 22 m during the last 12 months
- » Without the outflow for acquisitions (€ 148 m) adjusted NFS would have improved by € 126 m in the last 12 months

FACTORING/FORFEITING: NEGATIVE IMPACT ON CASH FLOW IN Q1

Cash flow would have been € 16 m higher without reduction of forfeiting

in € m	03/31/2019	12/31/2018	12/31/2017
Factoring	0.0	0.0	0.0
Forfeiting	9.0	24.9	28.0
Total	9.0	24.9	28.0
Δ End of previous year	-15.9	-3.1	22.9

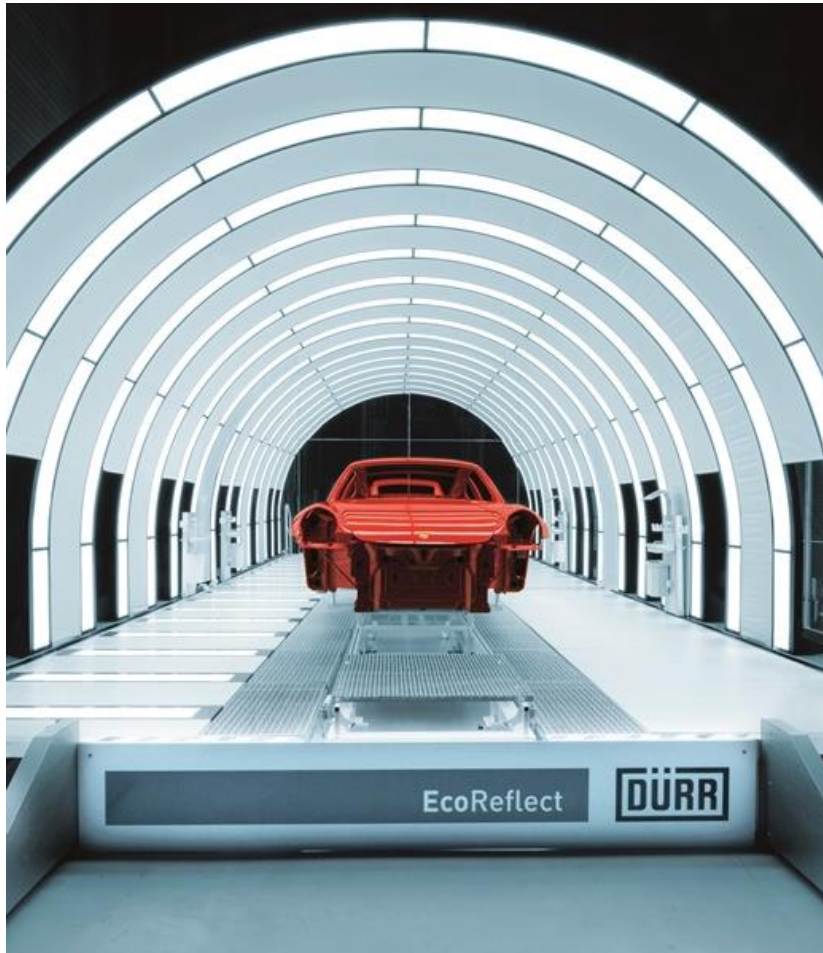
EQUITY RATIO GETTING CLOSER TO 30%

	03/31/2019	12/31/2018	03/31/2018
Equity in € m	1,034.3	992.2	931.5
Equity ratio in %	27.7	27.4	26.8
Net financial status in € m	-135.7	32.3	84.5
Cash in € m	589.2	655.0	558.6
Gearing in %	11.6	-3.4	-10.0
ROCE ¹ in %	16.5	24.0	23.7

- » Equity up 11% yoy
- » Net financial status expected to improve during the next quarters
- » ROCE expected between 20 and 30% in FY 2019

¹ annualized

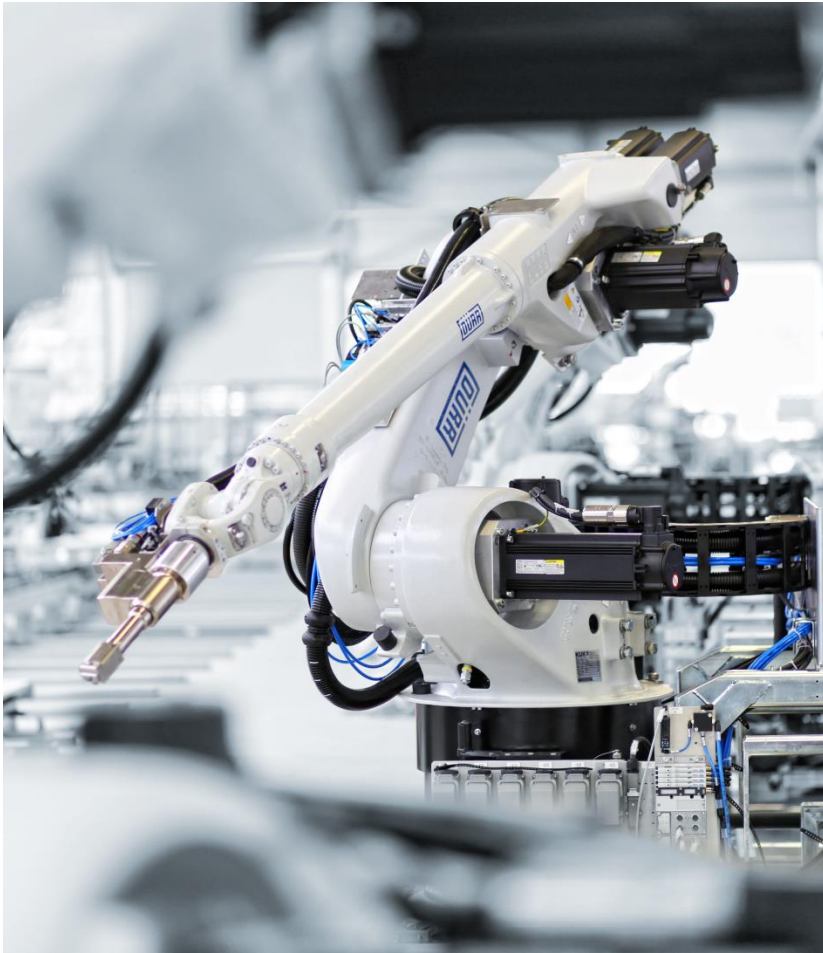
PAINT AND FINAL ASSEMBLY SYSTEMS



	Q1 2019	Q1 2018	Δ
Incoming orders in € m	394.1	274.2	43.7%
Sales revenues in € m	311.1	270.2	15.1%
EBIT in € m	12.7	12.4	1.7%
EBIT margin in %	4.1	4.6	-0.5 ppts
ROCE ¹ in %	55.3	44.7	10.5 ppts

- » Strong order intake in Q1 (e.g. Mexico, India), project pipeline unchanged at a satisfactory level
- » Q1 order intake margin improved yoy due to improved cost position (FOCUS 2.0)
- » EBIT increased slightly; EBIT margin decline due to billing of elder low margin orders
- » FOCUS 2.0 optimization program expected to generate margin improvements

¹ annualized



	Q1 2019	Q1 2018	Δ
Incoming orders in € m	159.6	168.6	-5.4%
Sales revenues in € m	139.4	145.5	-4.2%
EBIT in € m	14.6	15.2	-3.7%
EBIT margin in %	10.5	10.4	0.1 ppts
ROCE ¹ in %	19.8	25.2	-5.4 ppts

- » Moderate start in Q1, but healthy project pipeline
- » EBIT margin at 10.5% despite sales decline
- » Book-to-bill at 1.14
- » Market share stable between 45 and 50%

¹ annualized



	Q1 2019	Q1 2018	Δ
Incoming orders in € m	112.6	57.6	95.3%
Sales revenues in € m	88.3	30.3	>100%
EBIT in € m	-0.7	-1.0	-
EBIT margin in %	-0.8	-3.2	2.4 pts
ROCE ¹ in %	-1.6	-5.9	4.3 pts

- » Q1 figures influenced by consolidation of Megtec/Universal
- » Incoming orders nearly doubled
- » Sales tripled
- » Book-to-bill at 1.3
- » Earnings affected by weaker sales and underutilization in some areas, strong earnings improvement expected during the next quarters

¹ annualized



	Q1 2019	Q1 2018	Δ
Incoming orders in € m	105.1	103.4	1.6%
Sales revenues in € m	91.9	99.4	-7.5%
EBIT in € m	6.8	10.4	-34.5%
EBIT margin in %	7.4	10.5	-3.1 pts
ROCE ¹ in %	9.5	16.2	-6.7 pts

- » Order intake slightly above previous year's level
- » Sales decline due to weaker incoming orders in H2 2018
- » Earnings affected by sales decline and higher R&D costs (digital innovation)
- » Improvement of sales and earnings expected during the next quarters

¹ annualized



	Q1 2019	Q1 2018	Δ
Incoming orders in € m	334.6	415.2	-19.4%
Sales revenues in € m	319.2	294.6	8.3%
EBIT in € m	18.4	19.7	-6.9%
EBIT margin in %	5.8	6.7	-0.9 ppts
ROCE ¹ in %	14.6	19.8	-5.1 ppts

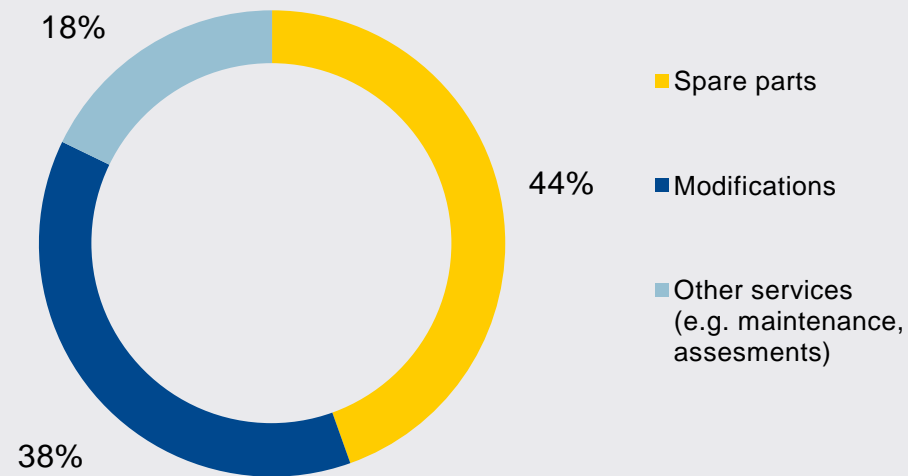
- » Order intake 19% below record level of Q1 2018
- » Q1 2018 impacted by a large order (approx. € 60 m), which was cancelled later by the customer and eliminated from WMS order book in Q2 and Q4 2018 respectively
- » Order intake in Q1 2019 on the average level of the previous quarters
- » Earnings decline due to stronger price competition, underutilization at some locations and higher production costs (e.g. wages)
- » Cost reduction program intensified in Q1

¹ annualized

SERVICE BUSINESS: STRONG EXPANSION OF 22%

All divisions with double digit sales growth rates

Service mix 3 months 2019

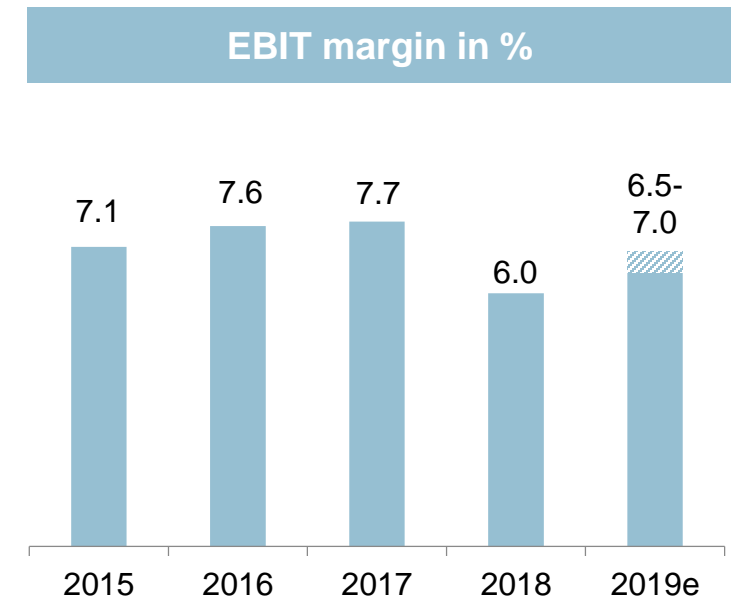
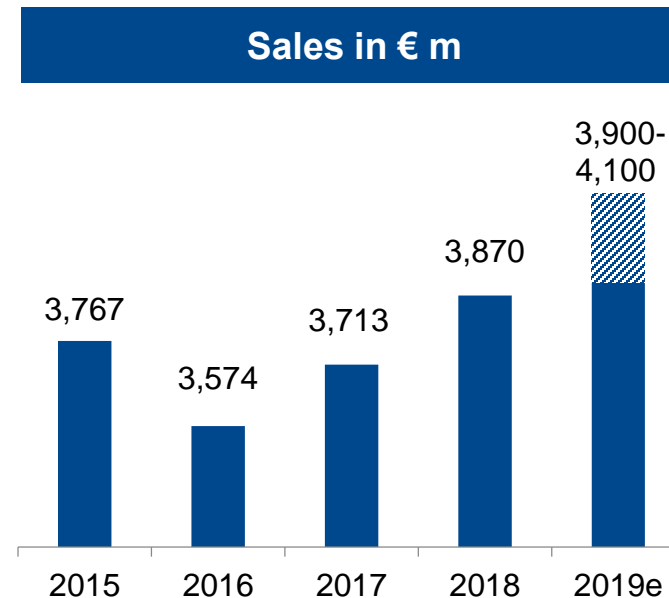
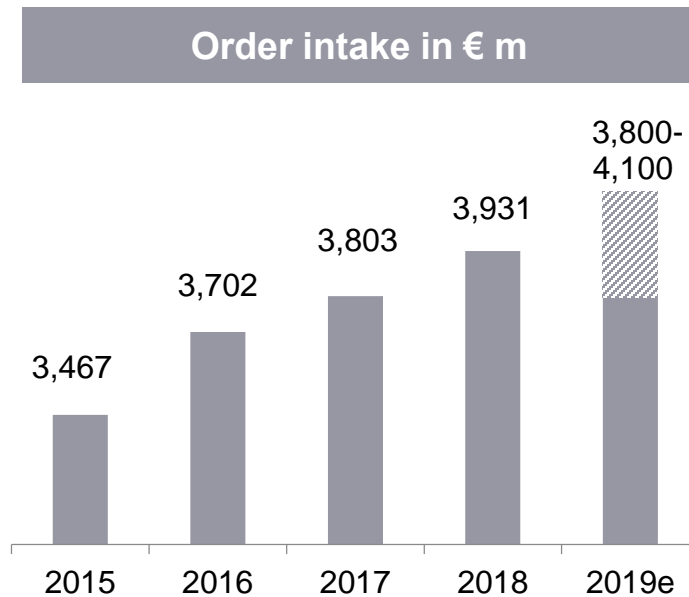


	Q1 2019	Q1 2018	Δ
Sales revenues in € m	272.8	224.4	21.6%
% of group sales	28.7	26.7	2.0 ppts

- » Margin level slightly declined but still very healthy
- » Service business expected to expand steadily during the next quarters; growth rate in Q1 was exceptional

OUTLOOK

Unchanged outlook: Growth in sales, earnings and cash flow expected



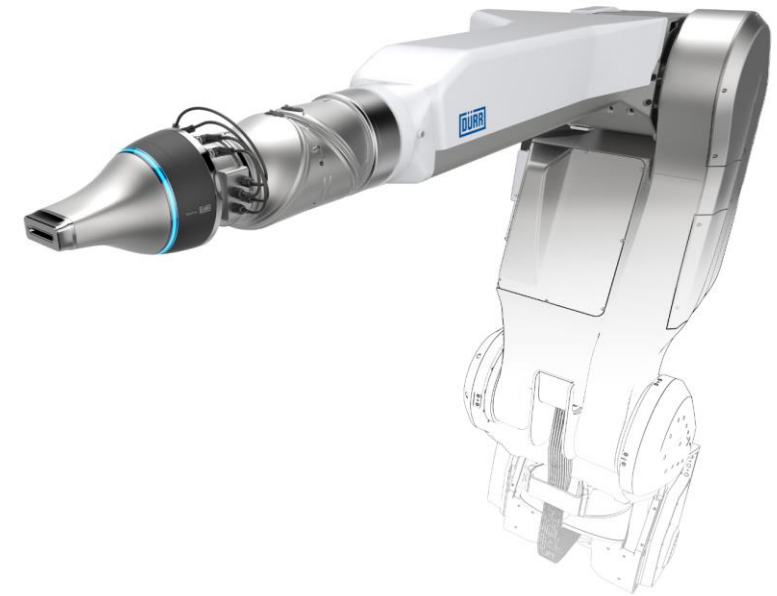
» EBIT margin before extraordinary effects slightly up (7.0 to 7.5%)

- » Strong business expansion despite challenging market conditions
- » Book-to-bill at 1.2, order backlog at € 2.8 bn
- » Moderate earnings development in Q1 (EBIT -5%), but improvement expected in the course of the year
- » Ongoing competitive pressure in all divisions, but cost cutting measures, productivity improvements, ceasing overload costs (2018) and lower extraordinary costs will lead to an earnings improvement in 2019
- » Cash flow improved in Q1 2019, NWC not satisfactory, DWC unchanged
- » Estimated IFRS 16 impact 2019: NFS: € 99 m decrease, EBITDA: + € 28 m, EBIT: + € 2.5 m, financial result: - € 2.5 m, operating cash flow + € 24 m, free cash flow: no influence
- » Clean Technology Systems: integration of Megtec/Universal progressing as planned
- » No guidance change for 2019

GUIDED TOUR: ECO PAINT JET

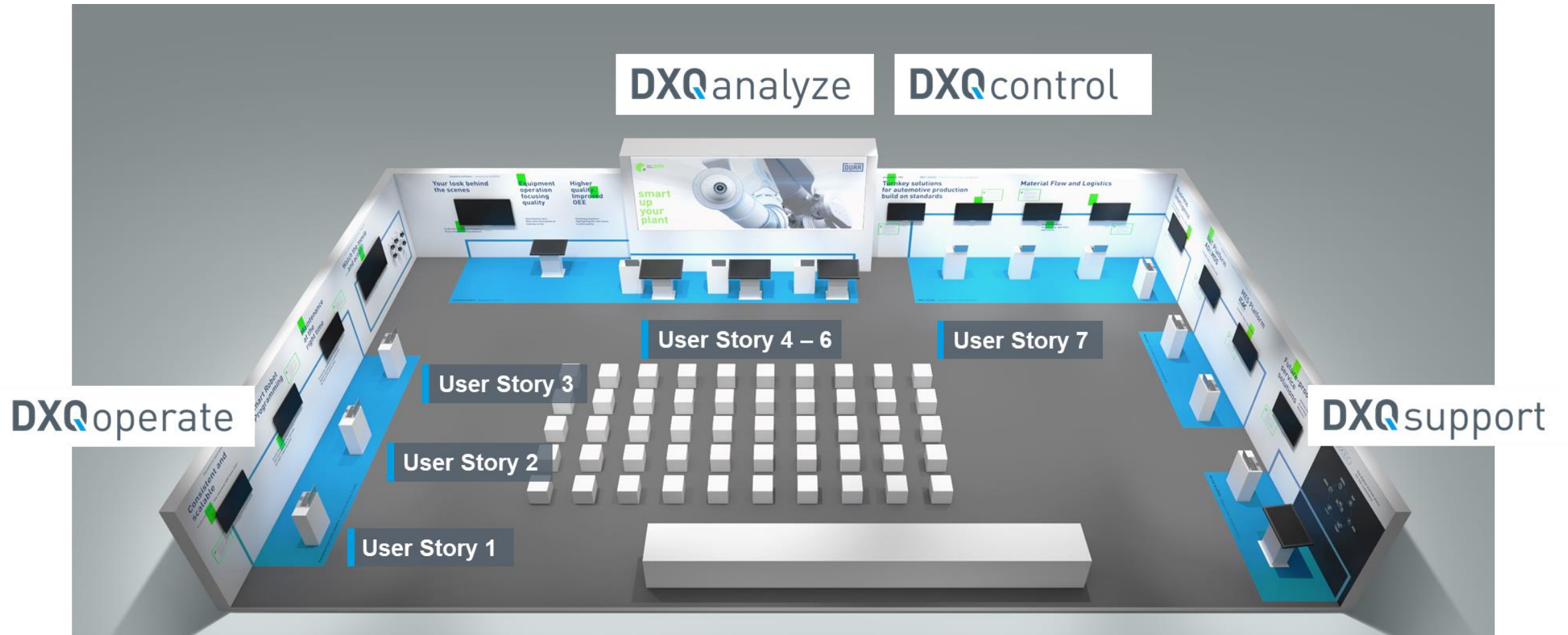
Overspray-free paint application, ground-breaking technology

- » Traditional application of paint generates overspray (paint particles which do not reach the surface)
- » Individualization trend: more two-tone painting required
- » “Old” process for two-tone painting (car roof)
 - » Manual masking of painted car and second run in painting line
 - » Much waste (masking material), high manual work load, painting line blocked for second run (loss of time)
- » New **EcoPaintJet**:
 - » Automated, highly accurate application
 - » No overspray (“printer like”)
 - » Boosting OEM production efficiency
- » Next step: **EcoPaintJet Pro**
 - » Overspray-free application like digital printing
- » Several OEM beta sites, market launch expected mid-2019



GUIDED TOUR: DIGITIZATION

Broad DXQ software spectrum, 7 user stories



GUIDED TOUR: DXQ SOFTWARE FAMILY

Smart & digital: software innovations straight from the Dürr Digital Factory

DXQoperate

- » Consistent and scalable: the common HMI (Human Machine Interface) from Dürr
- » Smart robot programming: the universal tool to program and parametrize the Dürr robot families
- » Maintenance at the right time: the digital maintenance management for the entire paint shop

DXQanalyze

- » Your look into the equipment: the IIoT solution that evaluates all equipment and process data
- » Equipment operation focusing on quality: the IIoT solution that enables real-time simulation of heat-up curves in the oven
- » Higher quality, improved Overall Equipment Efficiency: the IIoT solution that highlights the real issues in paint quality

DXQcontrol

- » Turnkey solutions for automotive production
- » Material flow and logistics: Planning. Operation. Control.
- » Business intelligence: more flexibility in analysis and reporting of production data

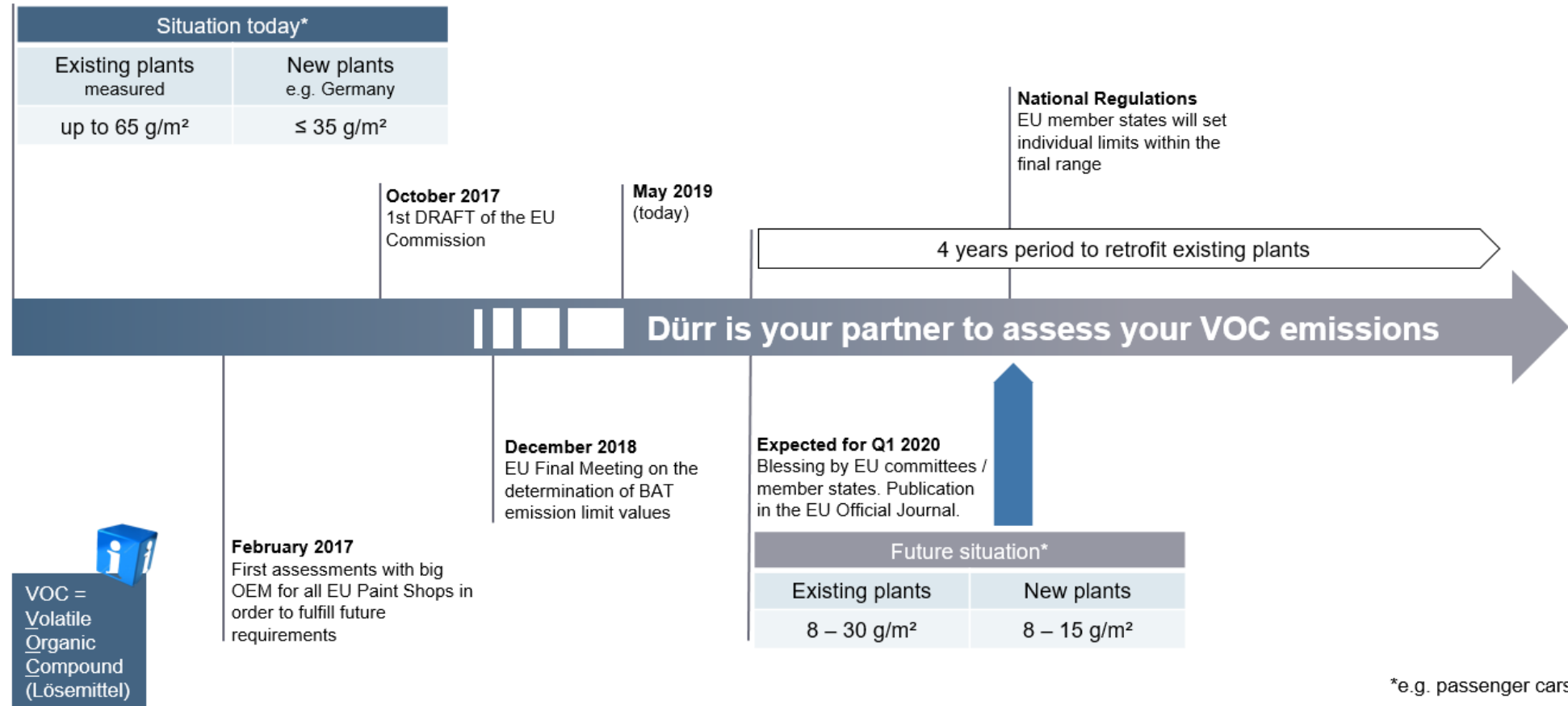
DXQsupport & LOXEO

- » Future-proof service solutions: hotline 24/7, eLearnings, webinars, trainings
- » LOXEO – the digital market place for our customers

GUIDED TOUR: ENVIRONMENTAL TECHNOLOGY

New EU-wide VOC regulations: broad opportunities in paint shop retrofitting

Total VOC down: Eco+Paintshop meets new regulations



GUIDED TOUR: ECO PRO FLEET AGV

Flexible material transport for the paint shop of the future

- » Paint shop of the future: Maximum efficiency, flexibility and productivity through process modularization and agile conveyor technology (AGVs)
- » Dürr produces own AGVs specific for the needs in a paint shop; no competitor offers a comparable flexible solution
- » First customer beta sites



Two drives per vehicle

Easy to clean

No pauses in operation

Low overall height

Paint and solvent resistant

Appendix

BALANCE SHEET HIGHLIGHTS (1/2)

	03/31/2019	12/31/2018	03/31/2018
Non-current assets	1,320.1	1,244.3	1,106.4
of which goodwill & intangibles	650.6	651.3	586.0
of which property, plant and equipment	522.5	433.8	405.0
of which investment & financial assets	68.8	65.1	62.4
Current assets	2,418.9	2,370.1	2,366.4
of which inventories and prepayments	556.0	535.4	530.6
of which contract assets	528.3	478.3	472.5
of which trade receivables	590.5	566.7	498.6
of which sundry financial assets	53.2	52.4	198.0
of which cash and cash equivalents	589.2	655.0	558.6
Total assets Dürr Group	3,739.0	3,614.4	3,472.8

BALANCE SHEET HIGHLIGHTS (2/2)

Equity and liabilities in € m	03/31/2019	12/31/2018	03/31/2018
Total equity	1,034.3	992.2	931.5
of which non-controlling interests	15.5	14.9	15.0
Non-current liabilities	857.9	786.1	791.1
of which provisions	69.4	69.1	68.6
of which bond and bonded loan	598.1	598.0	597.4
of which other financial liabilities	84.9	12.8	12.2
of which deferred taxes	90.7	91.9	94.4
Current liabilities	1,846.8	1,836.2	1,750.2
of which other provisions	127.1	130.7	141.3
of which contract liabilities	609.9	670.8	650.0
of which trade payables	545.4	501.4	387.2
of which sundry financial liabilities	349.0	347.7	390.1
of which other liabilities	135.8	142.3	137.4
Total equity and liabilities Dürr Group	3,739.0	3,614.4	3,472.8

P&L IN DETAIL

in € m	Q1 2019	Q1 2018	Δ
Sales revenues	949.9	840.1	13.1%
Cost of sales	-743.5	-641.4	-
Gross profit on sales	206.4	198.6	3.9%
Selling expenses	-82.5	-71.0	-
General administrative expenses	-46.9	-43.8	-
Research and development costs	-29.1	-30.9	-
Other operating income	7.7	9.9	-21.9%
Other operating expenses	-7.0	-11.8	-
Earnings before investment income, interest and income taxes	48.6	51.1	-4.8%
Investment income	2.0	0.6	241.5%
Interest and similar income	1.6	2.6	-36.4%
Interest and similar expenses	-6.3	-6.5	-
Earnings before income taxes	45.9	47.8	-3.9%
Income taxes	-12.9	-13.3	2.7%
Profit of the Dürr Group	33.0	34.5	-4.4%
Attributable to:			
Non-controlling interests	1.9	1.0	88.8%
Shareholders of Dürr Aktiengesellschaft	31.1	33.5	-7.2%
Number of shares issued in thousands	69,202.1	69,202.1	-
Earnings per share in € (basic and diluted)	0.45	0.48	-6.2%

CASH FLOW

in € m	Q1 2019	Q1 2018
EBT	45.9	47.8
Depreciation and amortization of non-current assets	27.1	20.0
Interest result	4.7	3.9
Income taxes paid	-9.7	-22.5
Δ Provisions	-4.4	-9.2
Δ Net working capital	-87.3	-99.6
Other	-19.2	-16.1
Operating cash flow	-43.0	-75.6
Interest paid (net)	0.2	-8.0
Repayment of lease liabilities	-5.9	-
Capital expenditures	-17.3	-12.8
Free cash flow	-66.0	-96.5
Others (e.g. currency effects)	-3.2	4.6
Change net financial status	-69.2	-91.8

OVERVIEW: FINANCIAL FIGURES BY DIVISION (1/2)

In € m

		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				394.1	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				311.1	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					1,150.1	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				12.7	12.4	12.5	14.0	17.0	56.0	17.0	13.9	16.0	23.4	70.4
	Employees	3,514					3,435	3,405	3,447	3,472		3,367	3,384	3,463	3,457	
APT	Incoming orders in € m	159.6				159.6	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				139.4	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					407.3	433.0	398.3	366.5		461.3	467.7	436.9	384.2	
	EBIT in € m	14.6				14.6	15.2	15.5	17.4	19.9	68.0	13.9	15.5	17.2	18.2	64.8
	Employees	2,271					2,112	2,154	2,230	2,246		1,953	1,985	2,024	2,063	
CTS	Incoming orders in € m	112.6				112.6	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				88.3	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					125.7	151.3	130.8	191.3		142.9	128.8	110.1	98.3	
	EBIT in € m	-0.7				-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					601	600	612	1,472		573	586	596	603	
MPS	Incoming orders in € m	105.1				105.1	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				91.9	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					260.0	258.1	236.0	201.5		256.4	262.1	269.1	257.6	
	EBIT in € m	6.8				6.8	10.4	13.5	14.1	21.8	59.7	14.4	15.7	17.6	16.7	64.3
	Employees	2,306					2,317	2,303	2,325	2,279		2,224	2,244	2,280	2,279	

OVERVIEW: FINANCIAL FIGURES BY DIVISION (2/2)

In € m

		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				334.6	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				319.2	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					676.4	657.6	666.3	601.6		534.0	555.8	591.0	560.9	
	EBIT in € m	18.4				18.4	19.7	17.4	21.5	27.6	86.2	20.3	23.4	22.1	17.2	83.0
	Employees	6,633					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
	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	0.1
	Order backlog in € m	0.0					0.1	0.0	0.0	0.0		0.1	0.1	0.1	0.1	
	EBIT in € m	-3.1				-3.1	-5.7	-7.0	-3.3	-5.4	-21.4	20.2	-8.8	-5.5	-4.7	1.2
	Employees	248					204	207	242	250		193	197	197	201	
Group	Incoming orders in € m	1,105.9				1,105.9	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				949.9	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					2,619.6	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				48.6	51.1	50.3	51.9	80.2	233.5	86.2	60.9	67.7	72.2	287.0
	Employees	16,415					15,153	15,236	15,461	16,312		14,393	14,545	14,876	14,974	

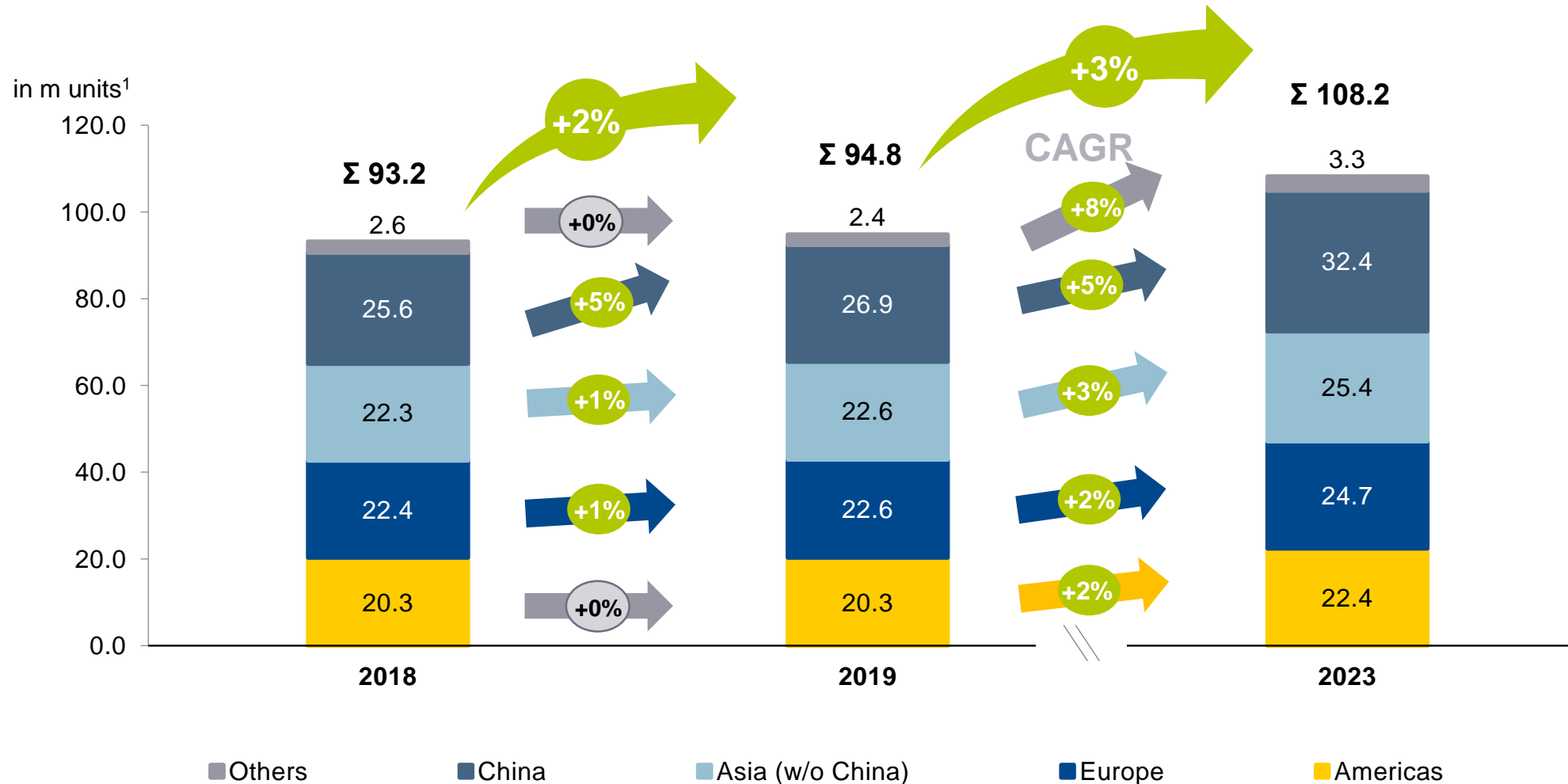
OVERVIEW: EXTRAORDINARY EFFECTS

In € m

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

FURTHER GROWTH OF CAR PRODUCTION

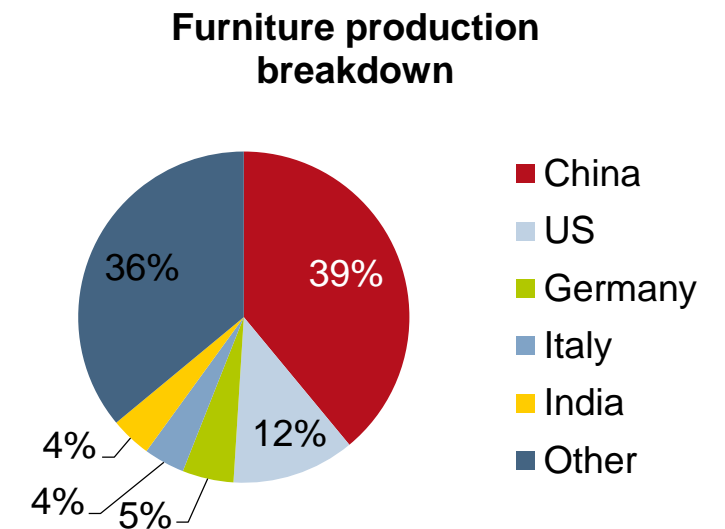
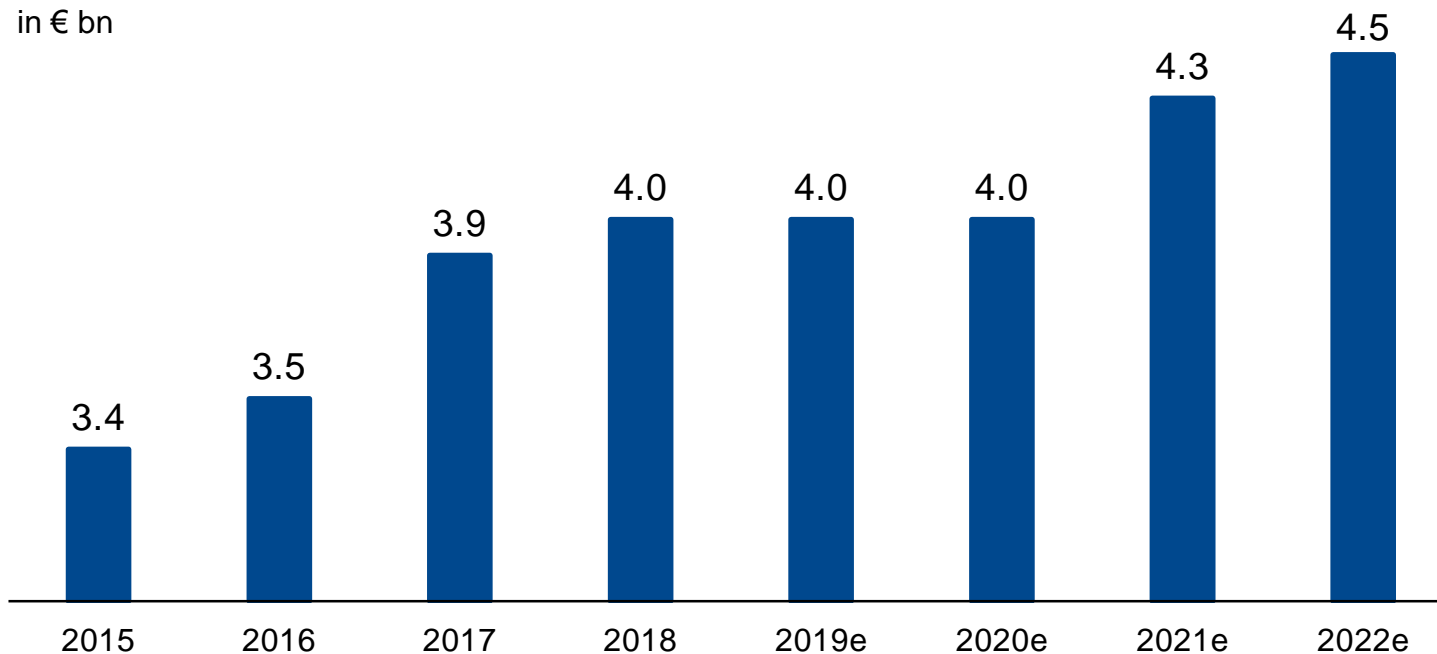
Growth drivers until 2023: China, India, South East Asia



¹ Light vehicles production
Source: PwC, Autofacts
Last update: April 2019

WOODWORKING MACHINERY MARKET

Woodworking machinery market stagnating in 2019



Sources: CSIL, Euroconstruct, Holzbauverband, competitor data, regional expert evaluation

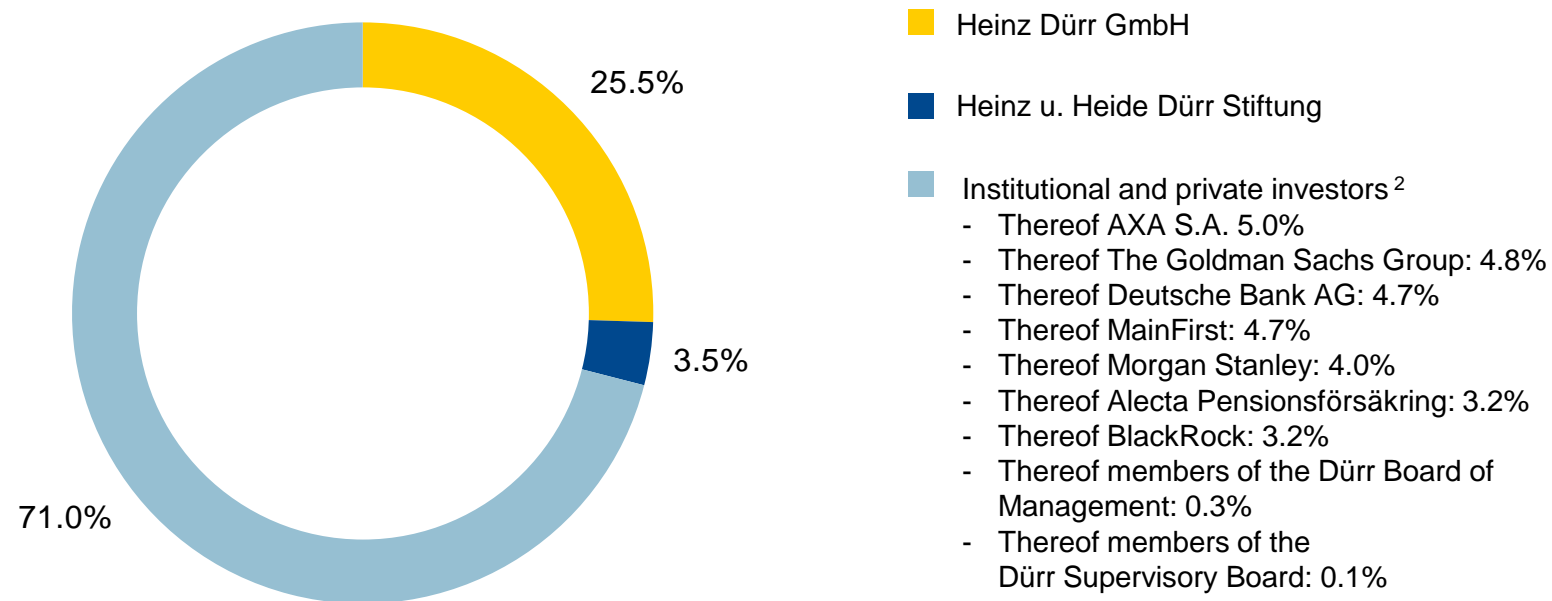
TARGETS FOR 2019

	Actual 2018	Target 2019
Incoming orders in € m	3,930.9	3,800 - 4,100
Orders on hand in € m (12/31)	2,577.2	2,400 - 2,900
Sales revenues in € m	3,869.8	3,900 - 4,100
EBIT margin in %	6.0	6.5 - 7.0
EBIT margin before extraordinary effects in %	7.1	7.0 - 7.5
ROCE in € m	24.0	20 - 30
Financial result in € m	-13.8	Deterioration
Tax rate in %	25.6	27 - 28
Earnings after tax in € m	163.5	175 -190
Operating cash flow in € m	162.3	Up on the previous year
Free cash flow in € m	78.4	Up on the previous year
Net financial status in € m (12/31)	32.3	-60 to -20
Liquidity in € m (12/31)	655.0	660 - 700
Capital expenditure in € m ¹	74.4	80 - 90

¹ on property, plant and equipment and on intangible assets (excluding acquisitions)

SHAREHOLDER STRUCTURE

Free float at 71.0%¹



¹ Free float calculated according to Deutsche Börse AG

² According to the relevant laws

4. FINANCIAL CALENDAR

- » 05/28/2019 Société Générale The Nice Conference, Nice
- » 06/05/2019 Deutsche Bank Berlin Conference, Berlin
- » 08/07/2019 Interim financial report H1 2019
- » 08/28/2019 Commerzbank Sector Conference, Frankfurt
- » 09/24/2019 Berenberg and Goldman Sachs German Corporate Conference, Munich
- » 09/25/2019 Baader Investment Conference, Munich

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CONFERENCE CALL RESULTS JAN. – MAR. 2019

Ralf W. Dieter, CEO | Carlo Crosetto, CFO

Bietigheim-Bissingen, May 17, 2019

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