Earnings Results Presentation

FY2026 2Q (113th term)

FUTABA



October, 2026

Futaba Industrial Co., Ltd.

Contents

1 . FY2026 2Q Financial Results

2 . FY2026 Forecast

3 . Appendix

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PL Summary

Unit: 100 Mill JPY

	FY2026 2Q	FY2025 2Q	Diff	Diff Ratio
Sales [Incl.DS]	3,515	3,294	+220	+6.7%
[Excl.DS]	2,240	2,189	+51	+2.4%
Operating Profit	78 (2.2%) (3.5%)	86 (2.6%) (3.9%)	▲7	▲8.6%
Ordinary Profit	69 (2.0%) (3.1%)	87 (2.7%) (4.0%)	▲18	▲20.6%
Profit attributable to owners of parent	45 (1.3%) (2.0%)	63 (1.9%) (2.9%)	▲18	▲28.8%
The figure in （） shows profit/sales ratio Upper row: Incl. DS Lower row: Excl. DS				
Exchange rate (1 USD)	159.4 JPY	146.0 JPY	+13.3 JPY	

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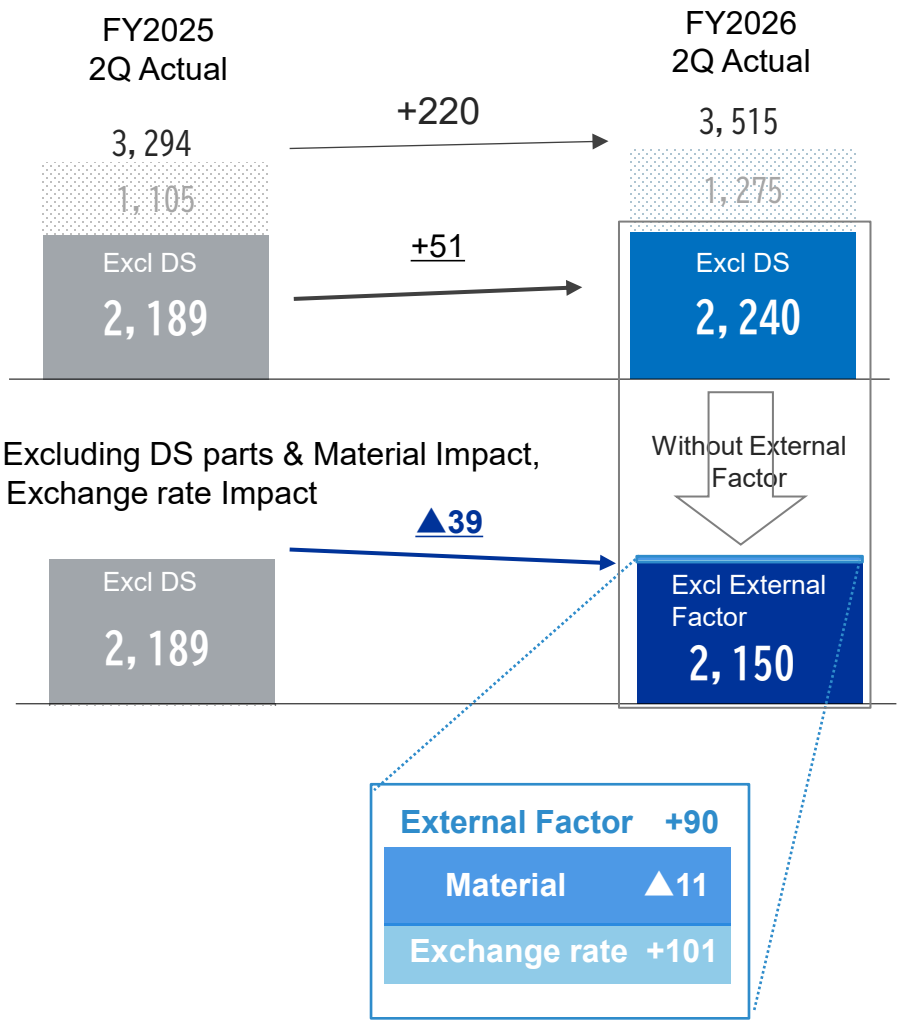
Sales detail: DS & Material, Exchange rate Impact

◆ Sales

Sales(Excl. DS)
DS amount

Unit：100 Mill JPY

■Excluding DS parts



- Sales including DS parts : +220
- Sales excluding DS parts : +51
- Sales excluding external factor(Material & Exchange Rate) : ▲39〈▲1.8%〉

- DS Parts?
  Direct Supply Parts. It is the parts supplied by customers. The selling price including DS parts includes values of parts supplied by customers. No Profit Impact
- Material Impact?
  Due to changes in market, Unit purchase prices of materials and material cost in sales prices fluctuate by the same amount. No Profit Impact
- Exchange rate Impact?
  When converting the financial figure of overseas subsidiaries into JPY, the differences in exchange rates between the previous year and the current year affects the sales amount.

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Sales & Operating Profit by segments Excl.DS

Unit：100 Mill JPY

		FY2026 2Q		FY2025 2Q		Diff	Diff Ratio
Japan	Sales [Excl.DS]	1,092		1,028		+63	+6.1%
	Operating Profit	34	(3.2%)	31	(3.1%)	+3	+9.6%
North America	Sales [Excl.DS]	747		678		+69	+10.3%
	Operating Profit	32	(4.3%)	29	(4.3%)	+2	+9.7%
Europe	Sales [Excl.DS]	193		187		+6	+3.6%
	Operating Profit	0	(0.3%)	6	(3.5%)	▲5	▲91.5%
China	Sales [Excl.DS]	171		258		▲87	▲33.7%
	Operating Profit	1	(1.1%)	15	(6.1%)	▲13	▲87.5%
Asia	Sales [Excl.DS]	96		86		+9	+10.8%
	Operating Profit	9	(10.3%)	3	(3.5%)	+6	+227.0%
Consolidated Adjustment	Sales [Excl.DS]	▲60		▲49		▲10	
	Operating Profit	▲0		▲0		▲0	
Total	Sales [Excl.DS]	2,240		2,189		+51	+2.4%
	Operating Profit	78	(3.5%)	86	(3.9%)	▲7	▲8.6%

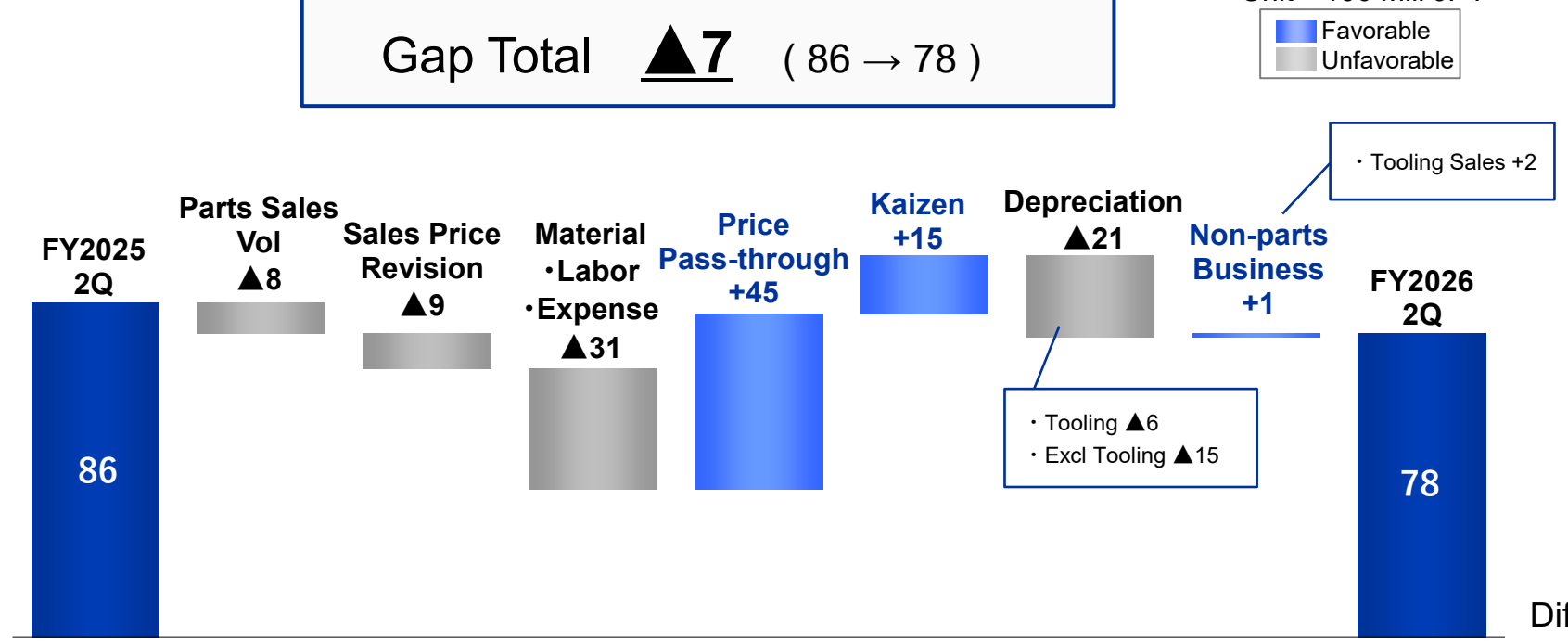
The figure in ( ) shows profit / sales ratio

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OP Flux Analysis FY25 2Q vs FY26 2Q

Gap Total ▲7 (86 → 78)

Unit：100 Mill JPY



	FY25 2Q	Parts Sales Vol	Sales Price Revision	Material・Labor・Expense	Price Pass-through	Kaizen	Depreciation	Non-parts Business	FY26 2Q	Diff
JPN	31	+10	▲3	▲22	+22	+8	▲17	+5	34	+3
NA	29	▲2	▲2	▲15	+23	+3	▲4	+0	32	+2
EUR	6	▲2	▲1	▲3	+0	+0	+0	+0	0	▲5
CHN	15	▲18	▲2	+5	+0	+4	+0	▲3	1	▲13
Asia	3	+4	▲1	+4	+0	+0	+0	▲1	9	+6
Adj	▲0						▲0	▲0	▲0	▲0
	86								78	▲7

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FY2026 Forecast

Net sales: Revised to reflect changes in material prices.
Operating profit and below: Revised downward, mainly due to reduced production in China and an updated assessment of the impact of downsizing production sites in Europe.

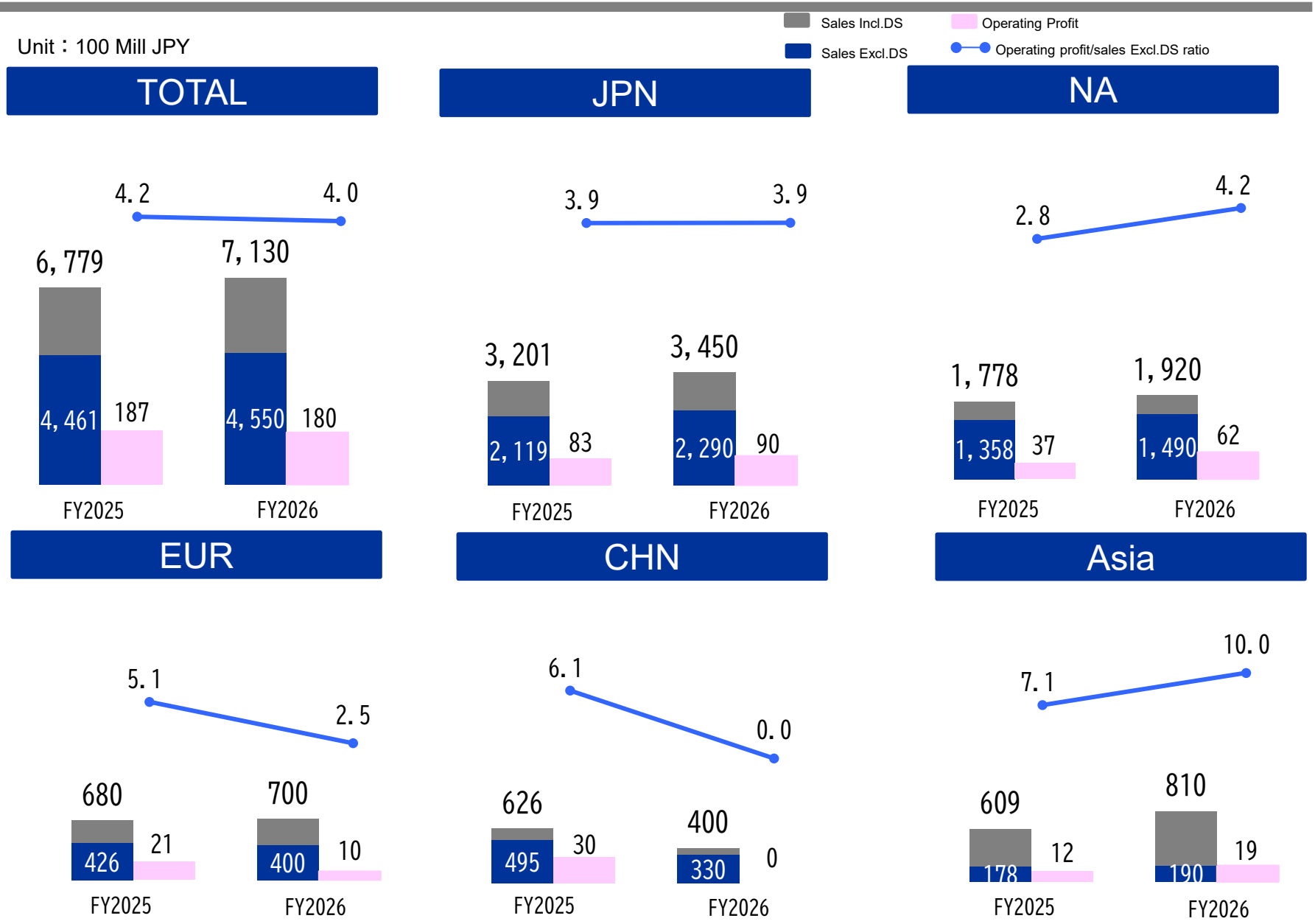
Unit： 100 Mill JPY

	FY2026 Revised Forecast	FY2026 Previous Forecast	Diff	Diff Ratio	FY2025 Actual	Diff
Sales [Incl.DS]	7,130	6,900	+230	+3.3%	6,779	+350
[Excl.DS]	4,550	4,460	+90	+2.0%	4,461	+88
Operating Profit	180 (2.5%) / (4.0%)	190 (2.8%) / (4.3%)	▲10	▲5.3%	187 (2.8%) / (4.2%)	▲7
Ordinary Profit	170 (2.4%) / (3.7%)	190 (2.8%) / (4.3%)	▲20	▲10.5%	208 (3.1%) / (4.7%)	▲38
Profit attributable to owners of parent	120 (1.7%) / (2.6%)	140 (2.0%) / (3.1%)	▲20	▲14.3%	160 (2.4%) / (3.6%)	▲40
The figure in （） shows profit/sales ratio Upper row: Incl. DS Lower row: Excl. DS						
Exchange rate (1 USD)	155 JPY	155 JPY			150 JPY	

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Sales & Operating Profit by segments FY2025 VS FY2026 Forecast

Unit：100 Mill JPY

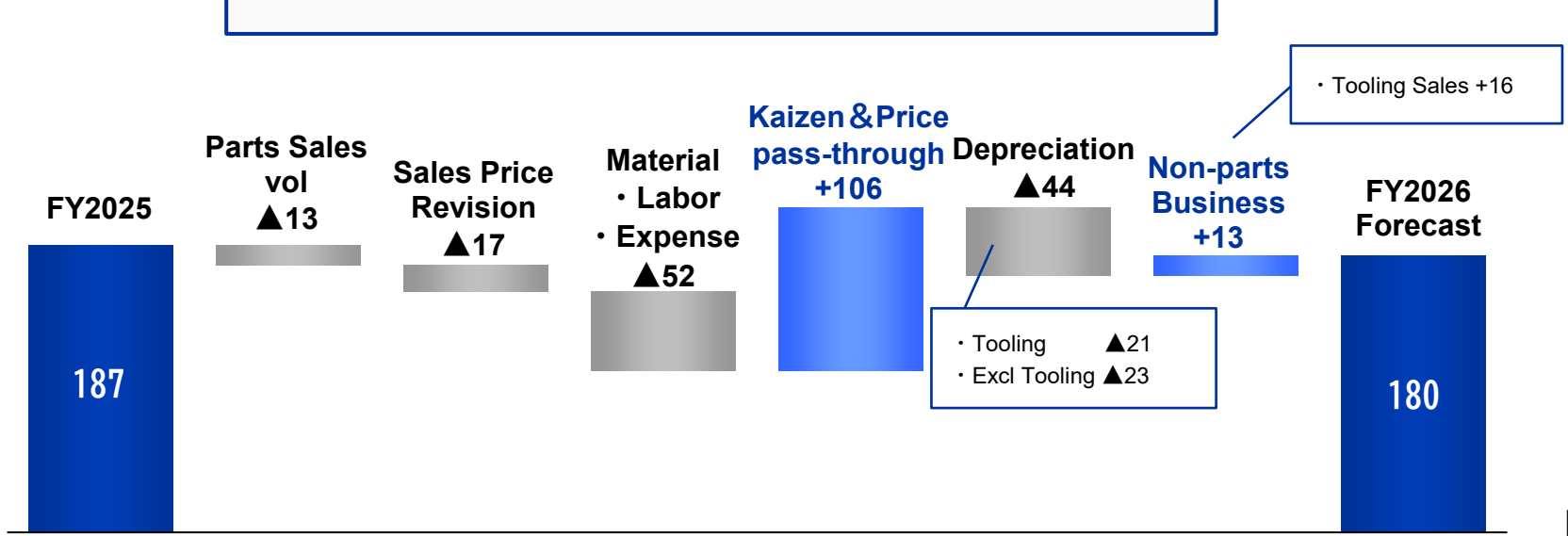


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OP Flux Analysis FY25 vs FY26 Forecast

Gap Total ▲7 (187 → 180)

Unit：100 Mill JPY



									Diff
JPN	83	+18	▲7	▲35	+47	▲36	+19	90	+6
NA	37	+2	▲2	▲14	+47	▲9	+0	62	+24
EUR	21	▲5	▲2	▲9	+4	+1	+0	10	▲11
CHN	30	▲36	▲4	+3	+8	+1	▲3	0	▲30
Asia	12	+8	▲2	+3	+0	+0	▲2	19	+6
Adj	1					▲1	▲1	▲1	▲2
	187							180	▲7

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Sales by customer

The figure in （） shows profit /sales ratio　Unit：100 Mill JPY

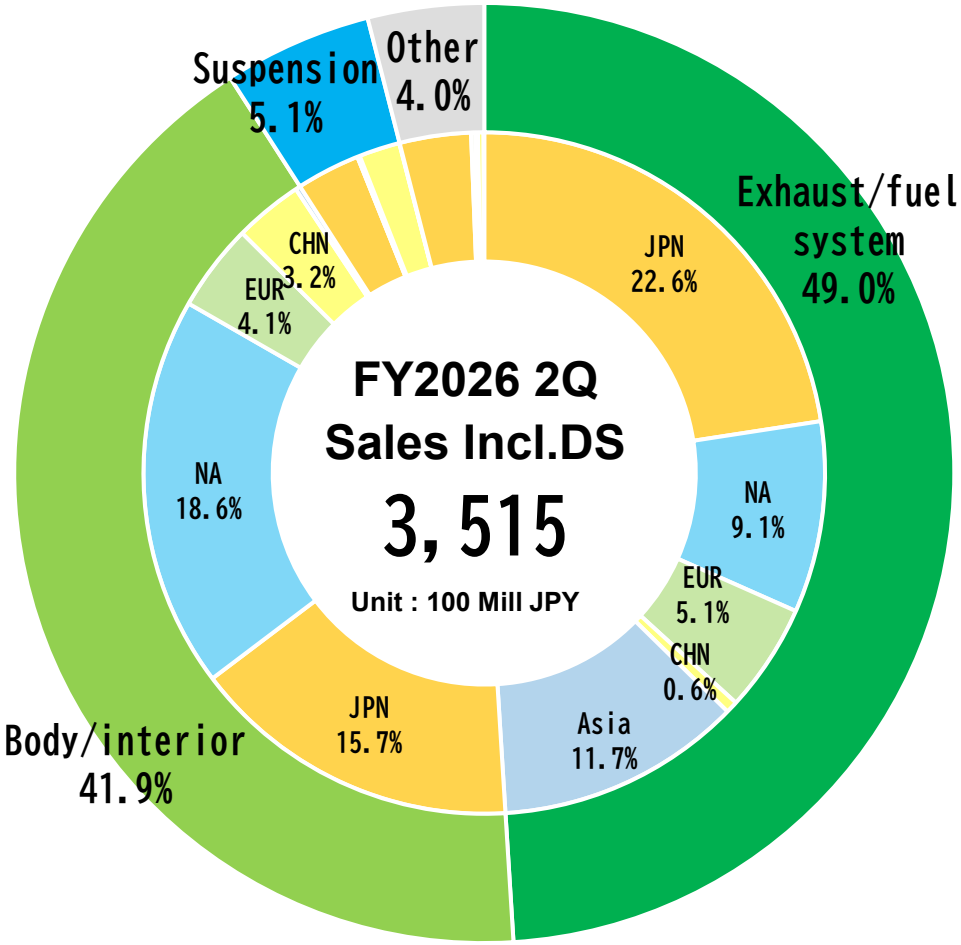
Incl.DS	FY2026 2Q		FY2025 2Q		Diff	Diff Ratio
Toyota Group※1	2,716	(77.3%)	2,707	(82.2%)	+8	+0.3%
Suzuki	408	(11.6%)	269	(8.2%)	+138	+51.5%
Mitsubishi Motors	132	(3.8%)	91	(2.8%)	+40	+44.0%
Nissan Group※2	56	(1.6%)	48	(1.5%)	+8	+17.5%
Honda	33	(1.0%)	39	(1.2%)	▲5	▲13.1%
Other	168	(4.7%)	139	(4.1%)	+29	+21.0%
Total	3,515	(100.0%)	3,294	(100.0%)	+220	+6.7%

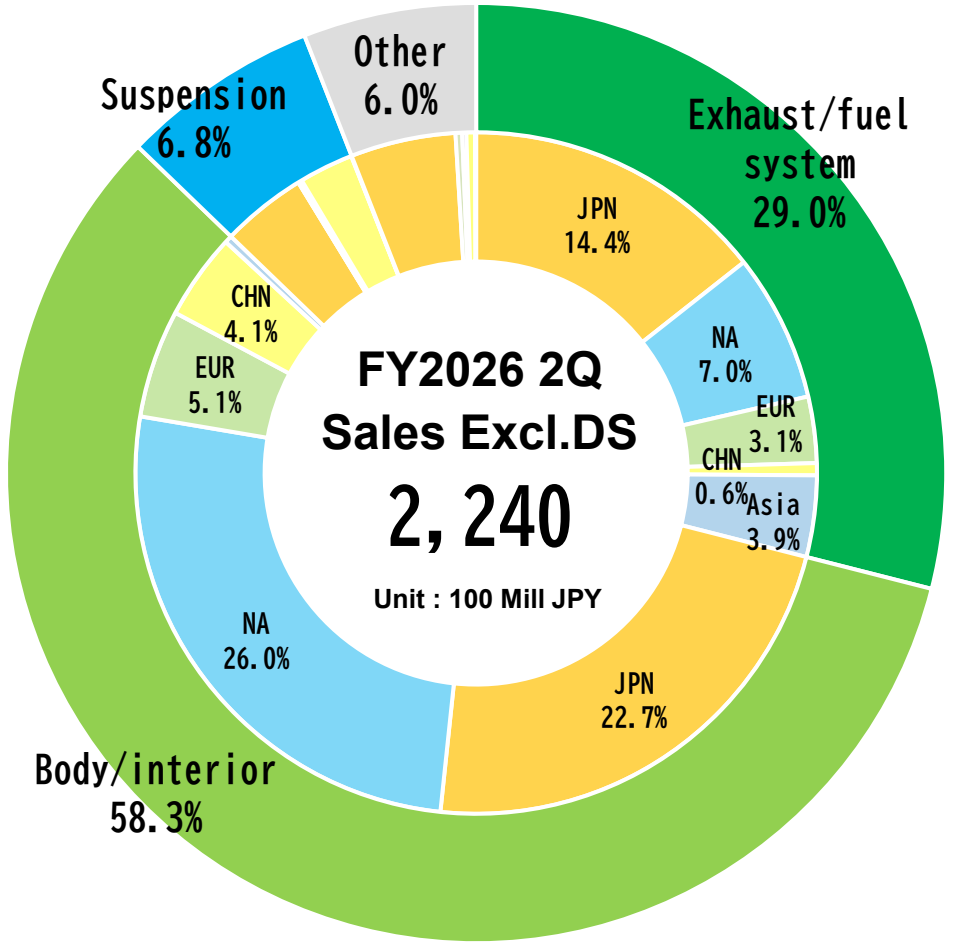
Excl.DS						
Toyota Group※1	1,901	(84.8%)	1,881	(86.0%)	+19	+1.0%
Suzuki	110	(4.9%)	102	(4.7%)	+7	+7.8%
Mitsubishi Motors	57	(2.5%)	51	(2.4%)	+5	+10.3%
Nissan Group※2	43	(1.9%)	35	(1.6%)	+7	+20.8%
Honda	29	(1.3%)	30	(1.4%)	▲1	▲5.1%
Other	100	(4.6%)	87	(3.9%)	+13	+15.1%
Total	2,240	(100.0%)	2,189	(100.0%)	+51	+2.4%

※1　Toyota Group includes Daihatsu , etc.　※2　Nissan Group includes Nissan Shatai

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Percentage of sales by Product Category





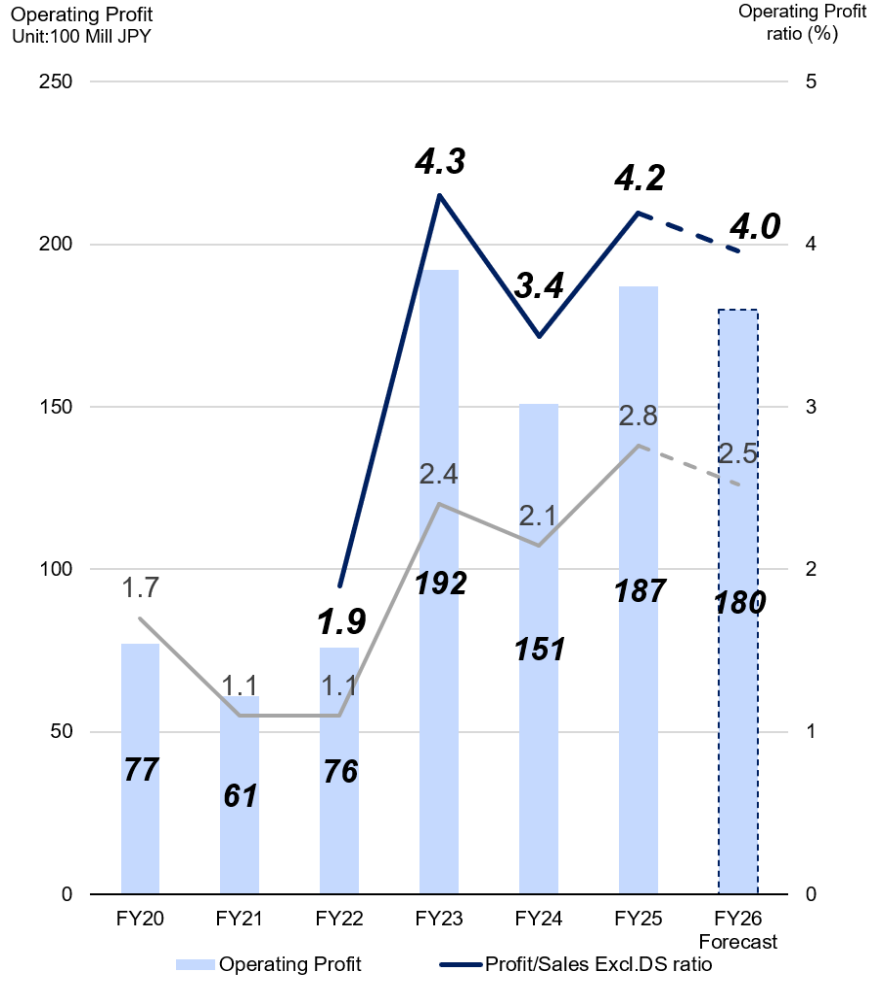
Compare Sales Incl.DS parts to Sales Excl.DS parts

Exhaust and fuel system parts 49.0%→29.0% (▲20.0pt)

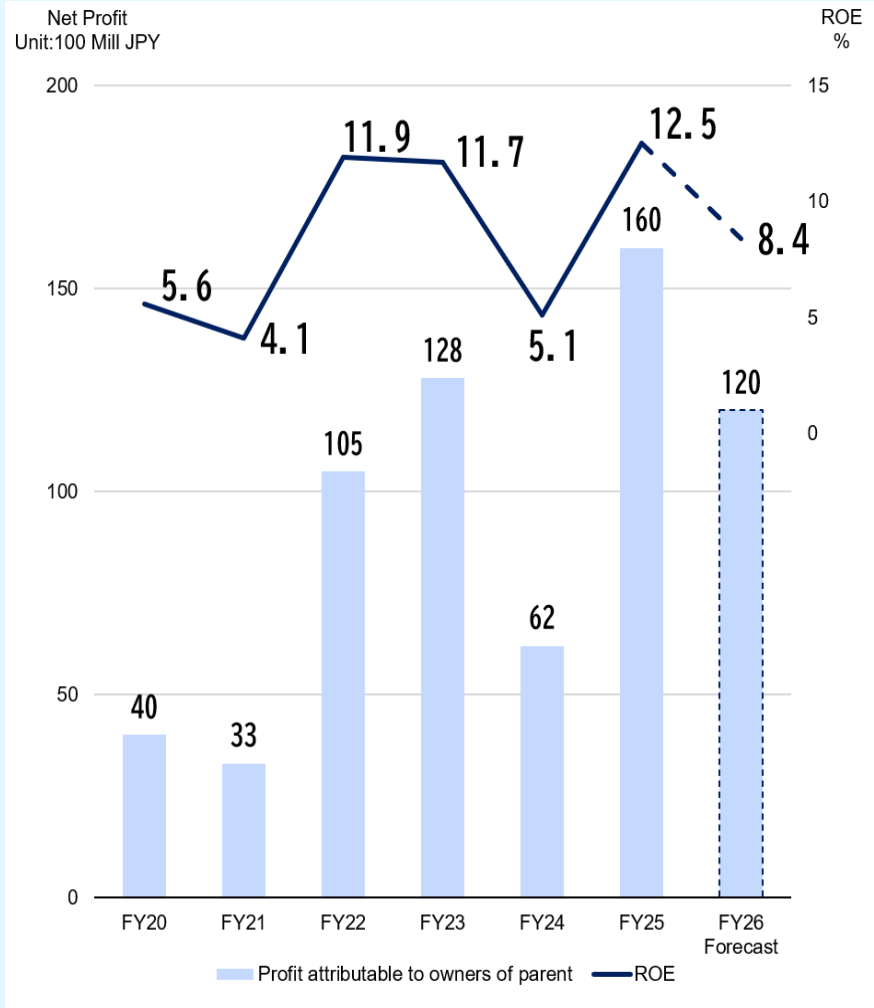
Body and Interior parts 41.9%→58.3% (+16.4pt)

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Operating Profit

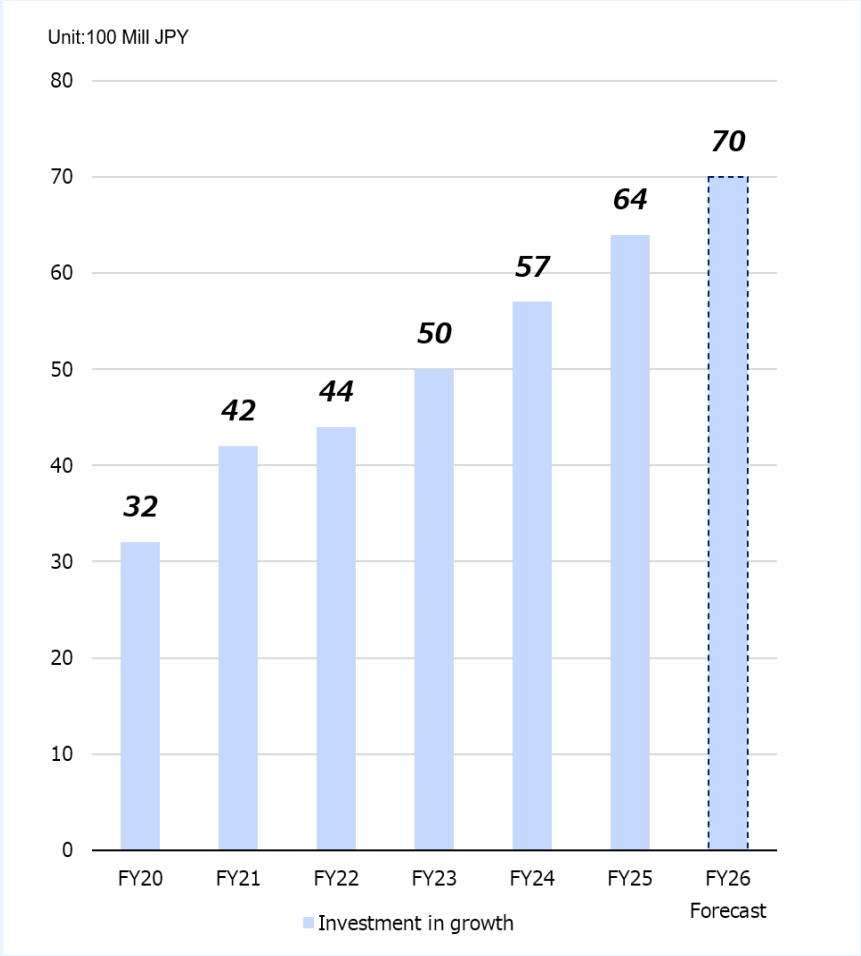


ROE

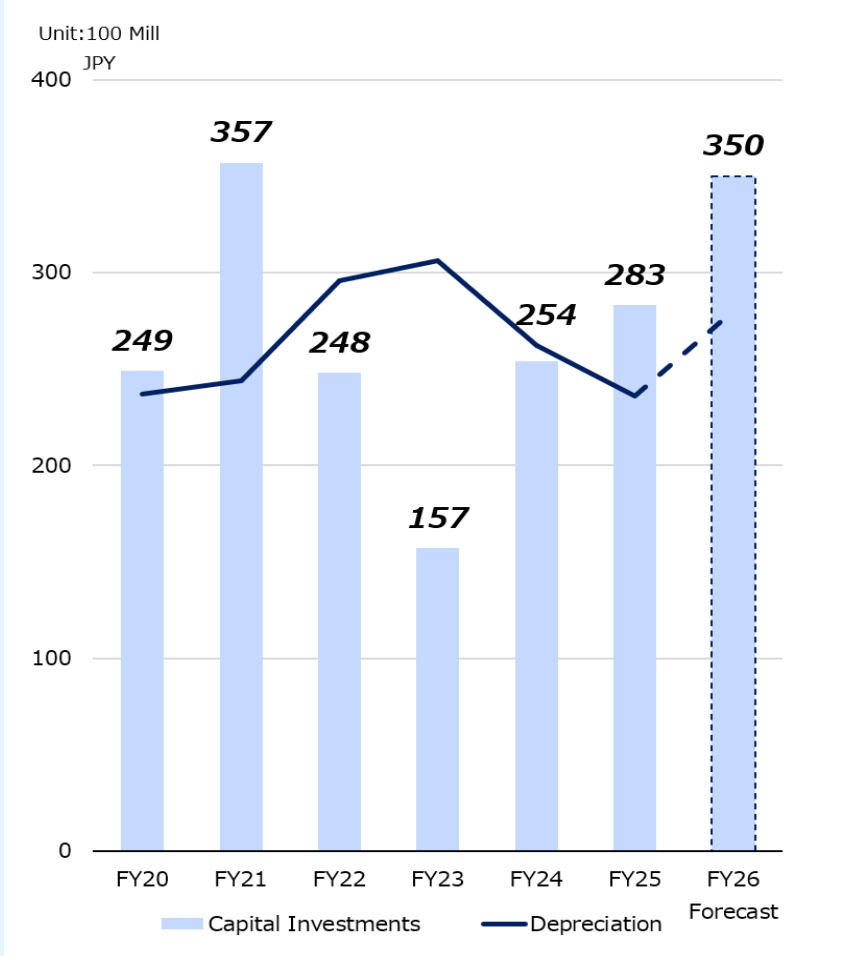


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Investment in growth

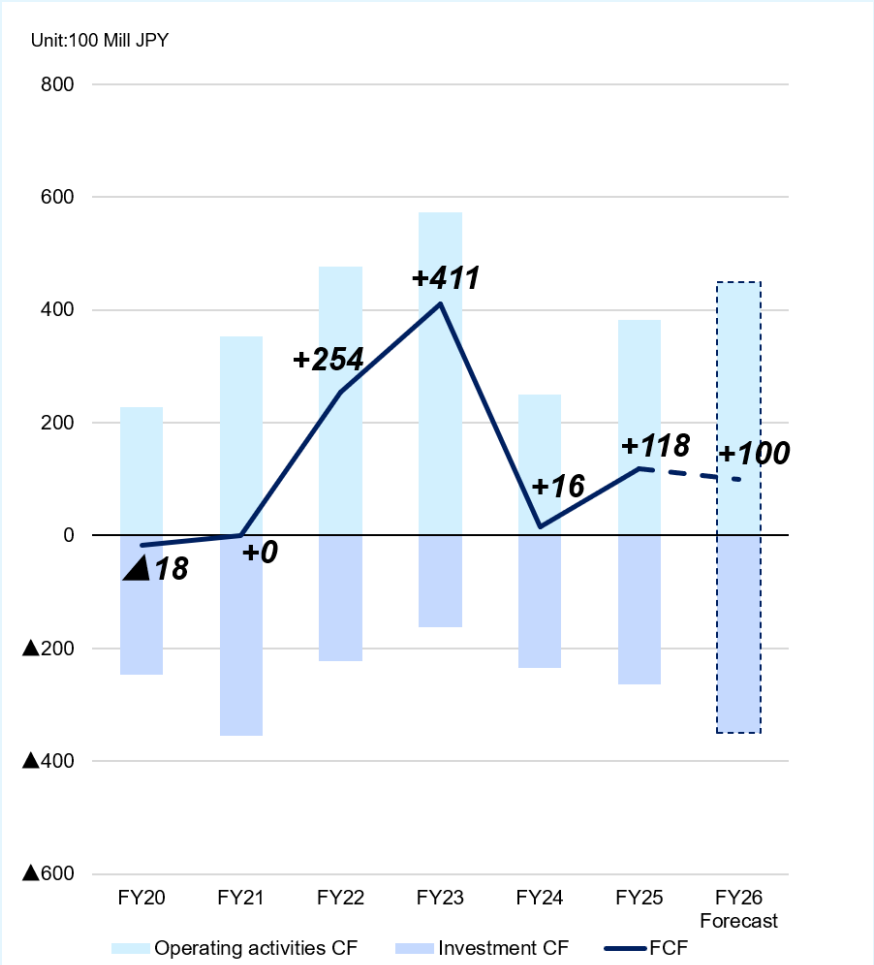


Capital investments

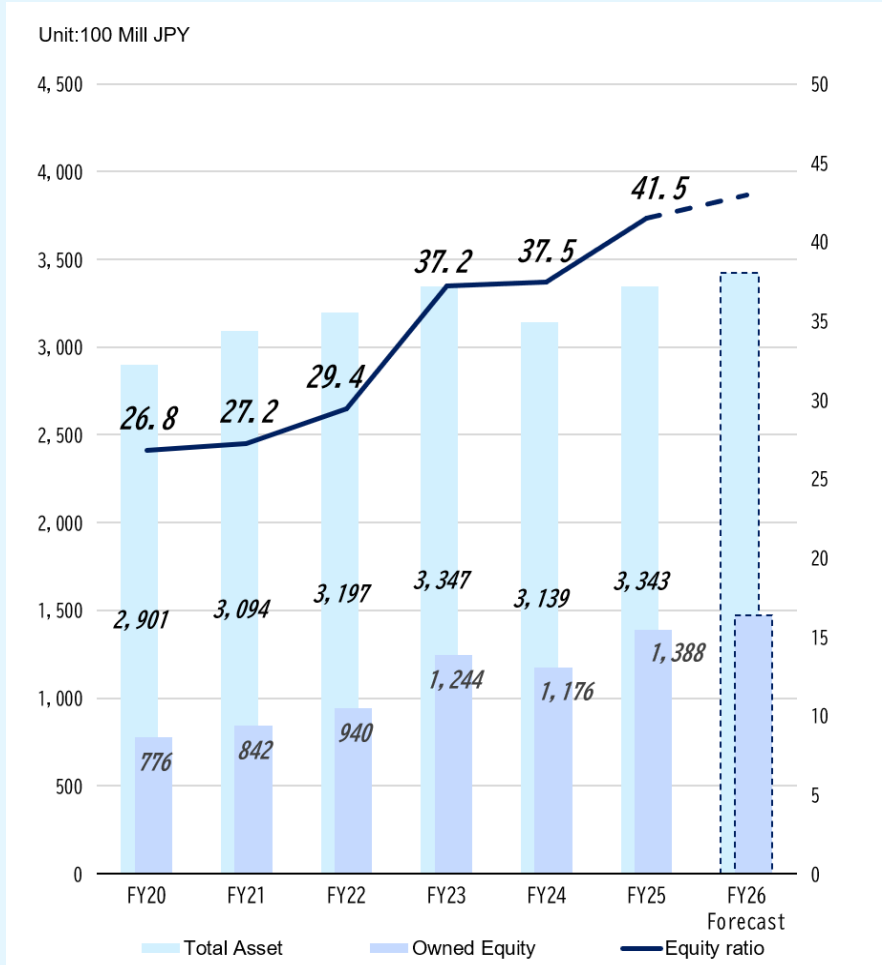


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Free・Cash・Flow(FCF)

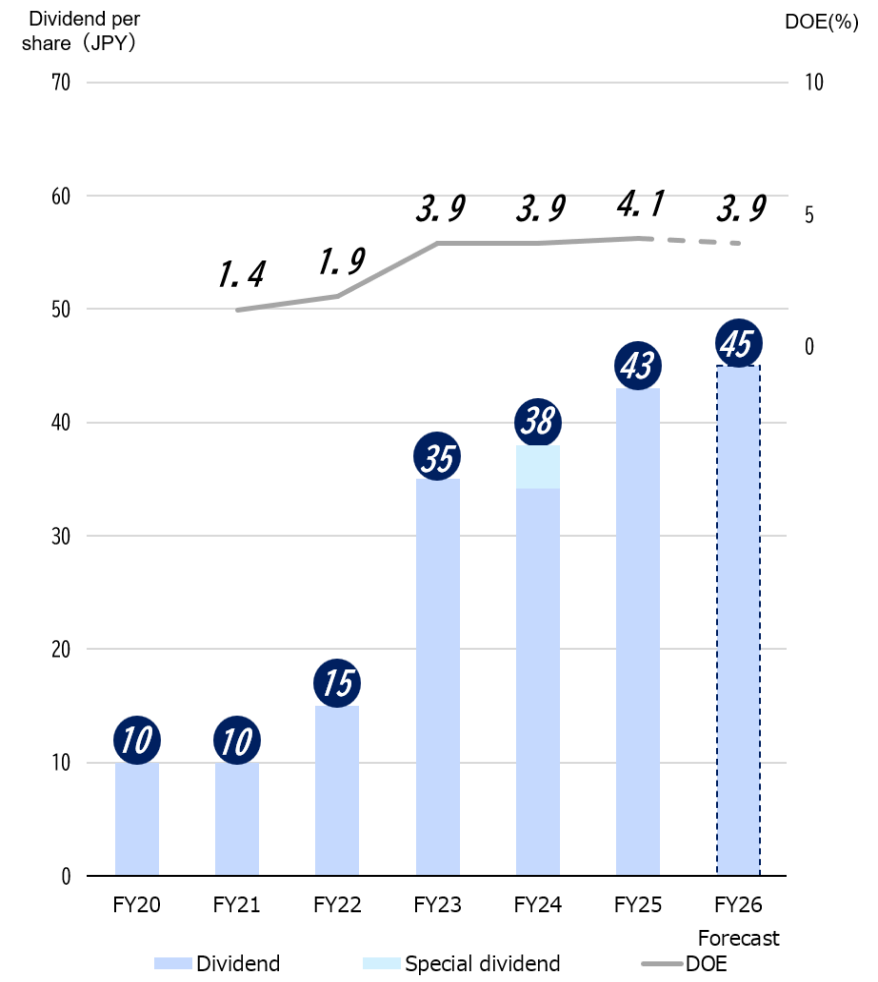


Equity ratio



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Shareholder Returns



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