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Bayerische Motoren Werke Aktiengesellschaft: Adjustment of 2026 Guidance

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Today, the Board of Management of Bayerische Motoren Werke Aktiengesellschaft (BMW AG) has changed the outlook for the 2026 financial year as follows:

- Deliveries Segment Automotive: slight decrease versus previous year (before: at previous year's level)

- EBIT Margin Segment Automotive: in the corridor 1-3% (before: in the corridor 4-6%)

- RoCE Segment Automotive: in the corridor 1-5% (before: in the corridor 6-10%)

- Group Profit before Tax: significant decrease versus previous year (before: moderate decrease)

- CO_2e Emissions Scope 3: at previous year's level (before: slight increase)

The BMW Group expects the Automotive Free Cashflow to be above €2.5 billion. The dividend payout ratio of 30-40% of net income attributable to BMW AG shareholders and the third share buyback program that is currently running both remain unchanged.

The negative development in the Chinese automotive market further accelerated in the second quarter. The China Passenger Car Association has made a significant downward revision to their full-year forecast for the total market once again. This has resulted in a more intense competitive environment in China and in other countries in the Asia Pacific region. The BMW Group cannot operate in isolation of this situation. Positive volume developments in Europe and the USA cannot compensate for the sales decline in China and Asia Pacific.

Furthermore, the impacts of the Middle East conflict have extended beyond our original assumptions. On the one hand, energy prices remain elevated and weigh on the cost structures in our company; on the other hand, the lack of stability due to the conflict is negatively impacting consumer sentiment across markets around the world.

The effects outlined above contribute to a significant decline in profit and free cashflow in the second quarter versus previous year.

The BMW Group will expand the current 2026 cost reduction initiative by intensifying and accelerating structure and efficiency measures. The benefits will be visible in the following years. These additional measures will have a one-time negative impact in the second half of 2026.

The Half Year Report will be published on 30th July 2026. The definitions of the KPIs can be found in the Glossary of the BMW Group Report 2025 on pages 429 to 431.

(end)

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