

Press release

Le Bourget-du-Lac, 15 April 2026 at 6:00 p.m. CET



Annual Results 2025

Roctool (Euronext Growth – FR0010523167 – ALROC), specialists in induction technologies and innovative molding solutions, approved the consolidated financial statements for the year ended 31 December 2025. In a market environment that remains hesitant, the Group reported 2025 revenue of **€4.5m** and demonstrated genuine resilience, driven by the ramp-up of its cost-reduction plan and the strengthening of its strategic alliances.

 **Mathieu Boulanger, Chief Executive Officer of Roctool:**

"2025 was a demanding transition year, marked by an activity level that remained down, but also by structuring advances for Roctool. We continued, with discipline, to implement our cost-reduction plan, strengthened our cash position and consolidated our commercial and industrial growth drivers. The signals observed since the end of 2025 confirm a more favorable momentum, driven in particular by our strategic partnerships. 2026 begins with a clear ambition: to turn these foundations into tangible growth and accelerate the industrial deployment of our technologies."

In K€ - Consolidated data	2025	2024
Revenue	4 511	6 250
EBITDA*	(1 922)	(1 607)
EBIT (Operating income)	(2 310)	(2 376)
Net income from fully consolidated companies	(2 792)	(2 576)

2025 revenue amounted to €4.5m, down 28% compared with 2024 (€6.3m), in an industrial environment still affected by slow investment decision-making and a wait-and-see attitude due to the economic climate. Product sales came to **€3.1m**, services to **€1.4m**, while licences and royalties normalised to **€56k** after a 2024 year marked by the signing of a major agreement (€1.3m).

Gross margin came to €3.0m, representing 66% of revenue, reflecting the robustness of Roctool's technology model despite the contraction in activity volumes.

Key highlight of the year: structural costs stood at **-€5.1m versus -€6.4m in 2024**, i.e. a reduction of **€1.3m**. The cost-reduction plan launched in mid-2024 delivered its full effects, in line with the commitments made, with a positive contribution over the full year.

As a result, EBITDA remained under control at -€1.9m (vs -€1.6m in 2024) and EBIT came to -€2.3m, an improvement of €66k compared with the previous year (-€2.4m). This level reflects the first tangible effects of the optimization plan implemented, despite lower activity over the year.

Strengthened financial structure at end of 2025

Available cash stood at €2.2m as of 31 December 2025, compared with only €487k a year earlier. This improvement reflects the combined effects of the capital increase completed last November, initial orders secured for 2026, budget discipline, and rigorous cash management.

Equity attributable to owners of the parent amounted to €1.5m. Financial debt was kept under control at €1.5m, mainly comprising government-guaranteed loans (PGE), with no material deterioration compared with the previous year.

High-performance solutions for advanced manufacturing

Roctool also reaffirms the **strength of its patent portfolio**, built up over more than two decades, combined with **deep expertise** in applications across heating and cooling technologies, surface quality control and advanced processing of plastics and composites.

This intellectual property and know-how form the foundation of Roctool's ability to deliver **differentiated solutions proven in production**, such as the new RTF™ (Roctool Thermal Fusion™) technology presented at JEC World, the composites trade show, in March 2026. Roctool thus reaffirms its ambition to shape the next generation of thermoplastic composite manufacturing, enabling the **industrial-scale creation of composite structures that are lighter, stronger, more integrated and more sustainable**.

Strengthening of strategic alliances

The 2025 financial year was marked by the ramp-up of the partnerships formed in 2024. The framework agreement signed with Compose MFG, a leading Asian industrial player in thermoplastic composites, delivered its first commercial effects, helping to strengthen Roctool's presence in Asia in the electronics, sports and leisure, and aeronautics sectors.

The partnership with ENRX, a shareholder since 2024, represents a major strategic lever to accelerate the global rollout of Roctool technologies, in particular for the supply of induction systems.

These partnerships are structuring the evolution of Roctool's model towards a technology platform approach, enabling faster industrial deployment worldwide.

Outlook and focus for 2026

Recovery signals observed at the end of 2024 in the automotive sector gradually strengthened in 2025, without, however, reaching a level sufficient to fully offset the decline in industrial investment. The aerospace, defense, electronics and sports and leisure sectors are showing more favorable momentum and are priority growth drivers for Roctool. At the start of 2026, Roctool, together with its partners, is benefiting from improved commercial visibility, a significant pipeline of opportunities at an advanced stage, and renewed momentum.

The Company intends to build on its strong strategic alliances to accelerate the deployment of its technologies, convert its commercial opportunities and strengthen its presence in its priority markets.

Roctool is confident in the long-term relevance of its business model and in its ability to return to a path of profitable growth as market conditions normalise.

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About Roctool: Roctool, specializes in rapid heat and cool technologies for plastic injection and composite molding. The processes developed by Roctool are in production in the following industries: automotive, electronics, consumer products, renewable energy, beauty packaging and medical. Roctool is an induction molding technology, working with plastic and composite including recycled materials. Roctool offers Engineering services, induction generators, tooling hardware and on-site support to manufacturers around the globe. Roctool technologies are well known for removing secondary operations which enable manufacturers to reduce the overall cost of the parts produced, as well as their environmental impact. Headquarters are found in Le Bourget-du-Lac (France), Roctool is present in the USA, China, Japan and Germany. For more information: www.roctool.com