OMV GROUP

Capital Market Story

MAY 2026

Disclaimer

This presentation contains forward-looking statements. forward-looking statements may be identified by the use of terms such as “outlook”, “believe”, “expect”, “anticipate”, “intend”, “plan”, “target”, “objective”, “estimate”, “goal”, “may”, “will” and similar terms, or by their context.

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Agenda

01 Group

02 Financial Framework

03 Energy

04 Fuels

05 Chemicals

06 Results, Governance, and Appendix

Three strong integrated pillars delivering long-term value

Energy

→ E&P
→ Gas Marketing & Power

Fuels

→ Refining
→ Marketing

Chemicals

→ Base chemicals
→ Polyolefins

Growth areas

Energy:
→ Gas (e.g. Neptun Deep)
→ Renewable power
→ Geothermal energy

Fuels:
→ Retail
→ Aviation and CRT
→ SAF and e-mobility

Chemicals:
→ Borouge International
→ ReOil®

Clean CCS ROACE ≥12%

Financial strength through the cycle

Agile transformation to a more sustainable company

Strong underlying core businesses generating high cash flows

Chemicals and Gas as primary growth drivers

Attractive shareholder distributions

Delivering strong progress since initial Strategy 2030 announcement

Energy

- Mega gas project **Neptun Deep** development on track
- Successful **diversification of gas supply**
- **Advanced OMV Petrom** towards becoming a leader in renewables in SEE
- Drilling and production test completed for **geothermal energy** in Vienna
- **Gas discovery** in Norway in 2024

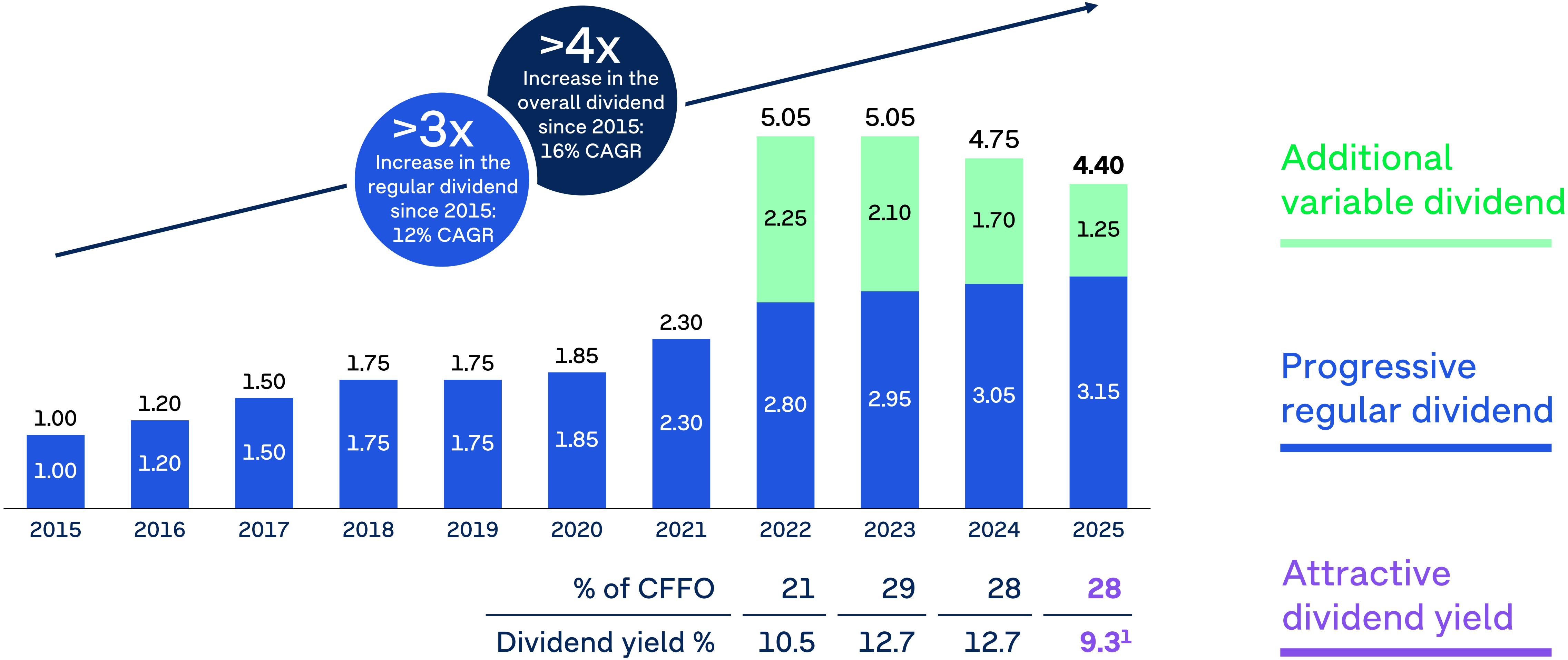
Fuels

- **Co-processing plant** in operation
- Petrobrazi **SAF/HVO plant** construction on track
- **~200 MW electrolyzer capacity** in Romania and Austria under construction (captive refinery demand)
- Doubled the **EV network**
- Rebranded retail stations

Chemicals

- Formed **Borouge International,** a global leading polyolefin company
- Progressing **significant growth projects** Kallo, Borouge 4 and Baystar
- Successfully started-up the chemical recycling plant **ReOil®** at Schwechat
- Significant progress in securing **recycling feedstock**

Attractive shareholder distributions through growing regular dividend plus additional variable dividend



	2022	2023	2024	2025
% of CFFO	21	29	28	**28**
Dividend yield %	10.5	12.7	12.7	**9.3**[1]

1 Based on share price as of Dec 31, 2025; as proposed by the Executive Board, subject to approval at the Annual General Meeting 2026

Absolute GHG emission reduction targets maintained

Absolute net GHG Scope

	2030	2040	2050
Scope 1&2 mt CO_2e	-30%	-60%	Net zero
Scope 3 mt CO_2e	-20%	-50%	Net zero
Carbon intensity gCO_2e/MJ	-10%	-25%	0%

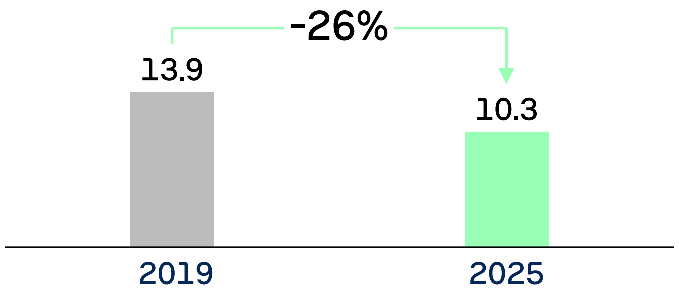
	2030
Routine flaring and venting	0%
Methane emissions	≤0.1%

Member of OGMP 2.0

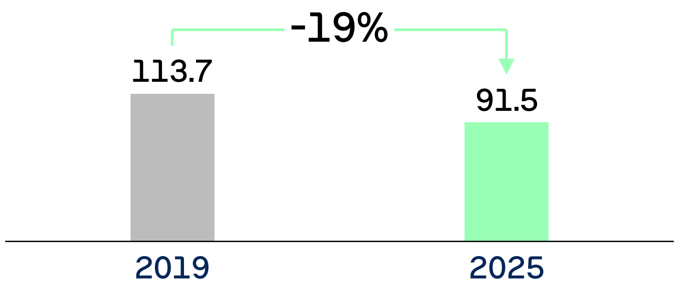
Note. Baseline of the targets is 2019. Excluding any impact of potential acquisitions.

Delivering on emission targets

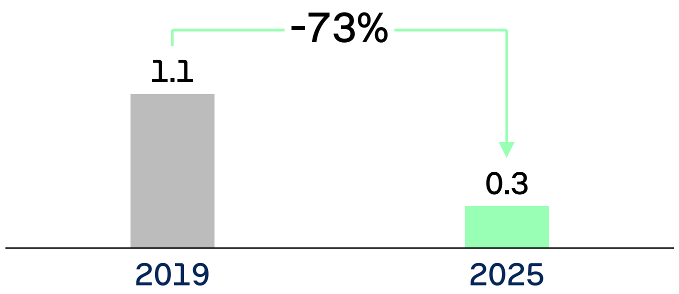
Absolute net Scope 1 & 2 GHG emissions
mn t CO_2e



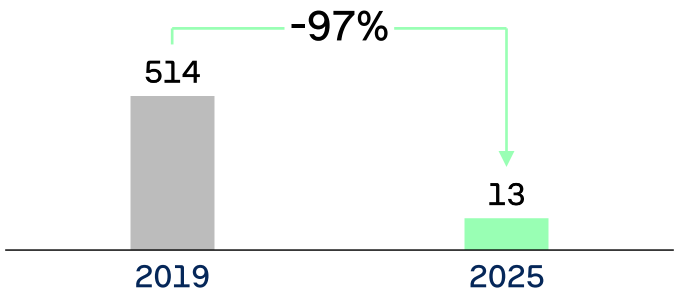
Absolute net Scope 3 GHG emissions
mn t CO_2e



Methane intensity
%



Flaring and venting
mn Sm^3



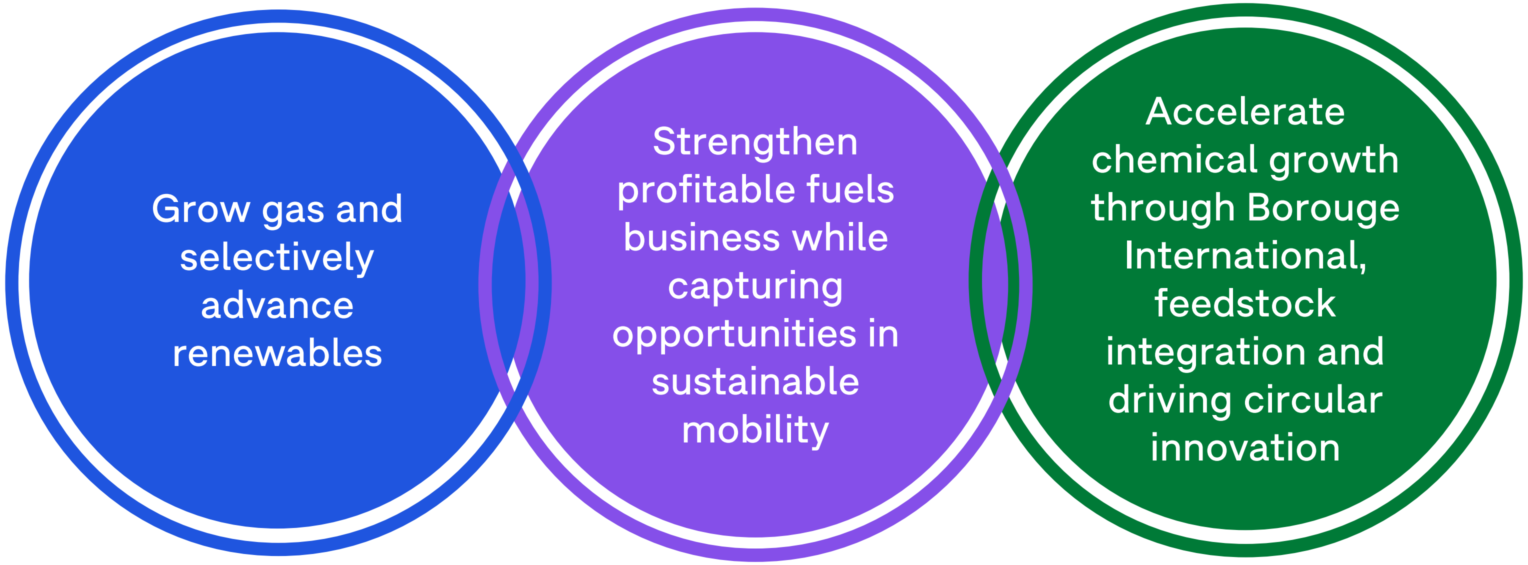
Improved energy and operational efficiency

Significant decrease in routine flaring and venting also led to a reduction in methane emissions

Scope 3 emissions reduction, primarily due to lower oil and gas sales as well as leveraging integration with chemicals business

We continue our transformation toward an integrated energy, fuels and chemicals company – with a strong focus on value

Net zero by 2050 in Scope 1, 2 and 3



High cash flow generation | Clear investment criteria | Attractive and reliable shareholder returns

Our 2030 Strategic Priorities

Energy

- Gas as a strategic growth engine
  - Deliver Neptun Deep and other organic projects
  - Increased investments in E&P
  - Cash flow accretive inorganic growth
- Adjust pace of renewable investments, while keeping the overall strategic direction unchanged

Fuels

- Optimize across the value chain and deepen chemical integration
- Deliver cost and margin efficiencies
- Grow retail and trading contribution
- Capture opportunities in renewable fuels, chemical feedstock and EV

Chemicals

- Drive growth through Borouge International
  - Successful merger and integration
  - Deliver organic growth projects, efficiencies and synergies
- Maximize utilization of OMV crackers
- Further optimize end-to-end integration across value chain
- Leverage technology and innovation for circular chemicals

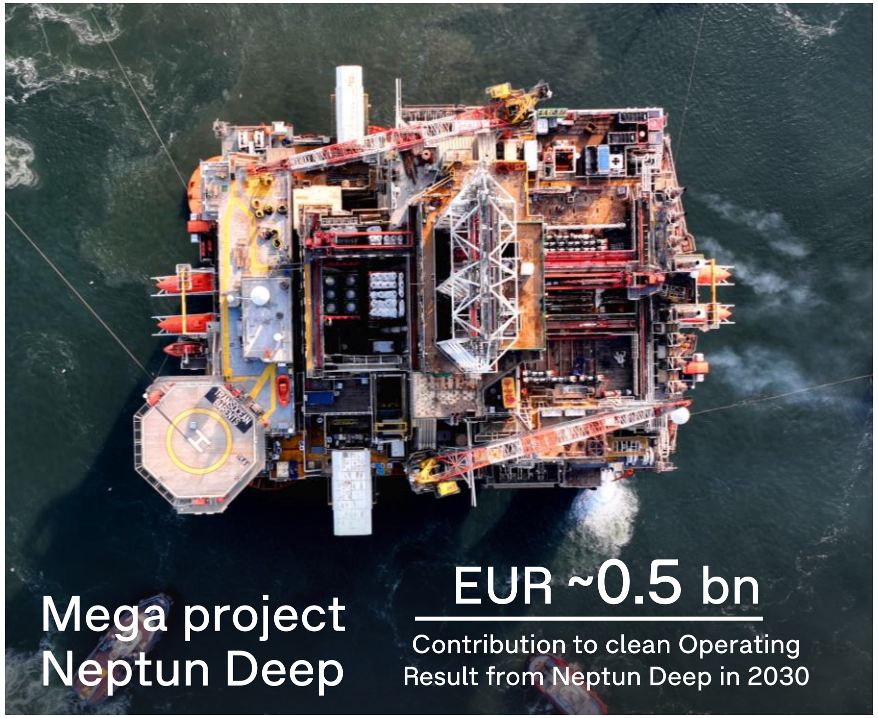
Extended group efficiency program until 2027

Gas is a key enabler of the energy transition and a long-term energy source

- Gas plays a **crucial role as bridging fuel in the energy transition** with low carbon footprint
- Gas-fired power generation will remain essential to **provide reliable supply,** in addition to renewables growth
- Existing infrastructure for both piped gas and LNG in place
- STEPS scenario indicates **until 2040** a robust European **demand** and a supply deficit estimate of around 300 bcm p.a.
- With **US LNG as a marginal price-setter**, prices in Europe set to remain high compared to the pre-COVID period and disconnected from oil prices

Significant gas growth from organic and inorganic opportunities

Organic growth



Inorganic growth

~400 kboe/d

Total oil and gas production in 2030

Fuels to grow cash generation by capturing market share and leveraging integrated value chain

- Ensure high asset utilization by leveraging direct sales channels and integration benefits
- Focus on profitable segments following societal trends
- Optimize asset portfolio and leverage integrated value chain
- Targeted investment in sustainable opportunities

>50%

2030 CFFO growth vs. 2024

Delivering the Strategy 2030 – OMV and XRG create Borouge International

- OMV and XRG announced on March 31, 2026, the successful **creation of the world's leading pure-play polyolefins company**
- **Fourth-largest polyolefins player globally**[1] with access to the largest, most attractive growth markets (Americas, Europe, Middle East, Asia)
- **OMV** and XRG hold a **50% stake** each as a result of OMV injecting EUR 1.5 bn cash into Borouge International to equalize ownership
- **Seasoned leadership team**, combining deep industry expertise with a proven track record of strategic execution
- Significant **platform for growth** with EBITDA expected to increase from a pro forma average of USD 4.5 bn in 2021–2025 to USD >7 bn through the cycle
- Substantial mid-term **synergies of EUR >500 mn** by 2030
- **Asset Usage Agreement** allows Borouge PLC to operate and market the volumes of **Borouge 4** while providing financial flexibility, with a recontribution of Borouge 4 not expected before 2029
- **Strong credit ratings** following the robust capital structure
  - S&P A (Negative)
  - Moody's Baa1 (Stable)
  - Fitch A– (Stable)

[1] As of 2026 and including Borouge 4 capacities

Three industry leaders create a global polyolefins champion

	BOREALIS	Borouge	NOVA Chemicals
Average EBITDA 2020-2024 in USD bn	1.1	2.4	1.1
Polyolefins capacity mn t pa	4.6[2]	6.4[3]	2.6
Market position in their respective region [1]	#2	#2	#5
	Innovative polyolefins producer with world class technology portfolio	World's largest single-site polyolefins complex[4], competitive feedstock and premium product offering	Feedstock-advantaged North American player with proprietary technologies

BOROUGE INTERNATIONAL

- Global scale and customer reach
- Advantaged cost position globally
- Proprietary technologies and premium products
- Growth platform
- Financial strength and synergies
- Well positioned for sustainability

1 Regional market position based on nameplate capacity
2 Borealis including 0.5 mtpa for Baystar capacities reflecting 50% stake
3 Borouge including 1.4 mtpa for Borouge 4 end of 2026
4 Post completion and recontribution of B4.

OMV's innovation is focused on unlocking new major market opportunities

ReOil® chemical recycling technology

Proprietary ReOil® technology

Patented technology with strong **monetization potential**

Sustainable fuels and feedstock

Flexible SAF and olefin production via synthetic and bio-based routes

Enable cost competitive bio- and waste-based feedstock

Leverage **advanced biotechnological processes** for unlocking access to new feedstock and for conversion flexibility

Decarbonization of Energy portfolio

Carbon Capture Innovation Center
Proprietary technology CoolSwingCC® for low- cost carbon capture pilot plant in Austria

Collaborations with geothermal technology leaders leveraging OMV´s subsurface and drilling expertise for industrialization

OMV Innovation 360

OMV Innovation Hub Schwechat

Strategic partnerships and collaborations

Network of company-wide innovators

OMV Strategy 2030

Value drivers today

Maximize cash generation

- Focus, high-grade and optimize E&P business
- Optimize margin delivery from refineries and retail
- Chemicals focus on integration efficiency
- Deliver Group efficiency program

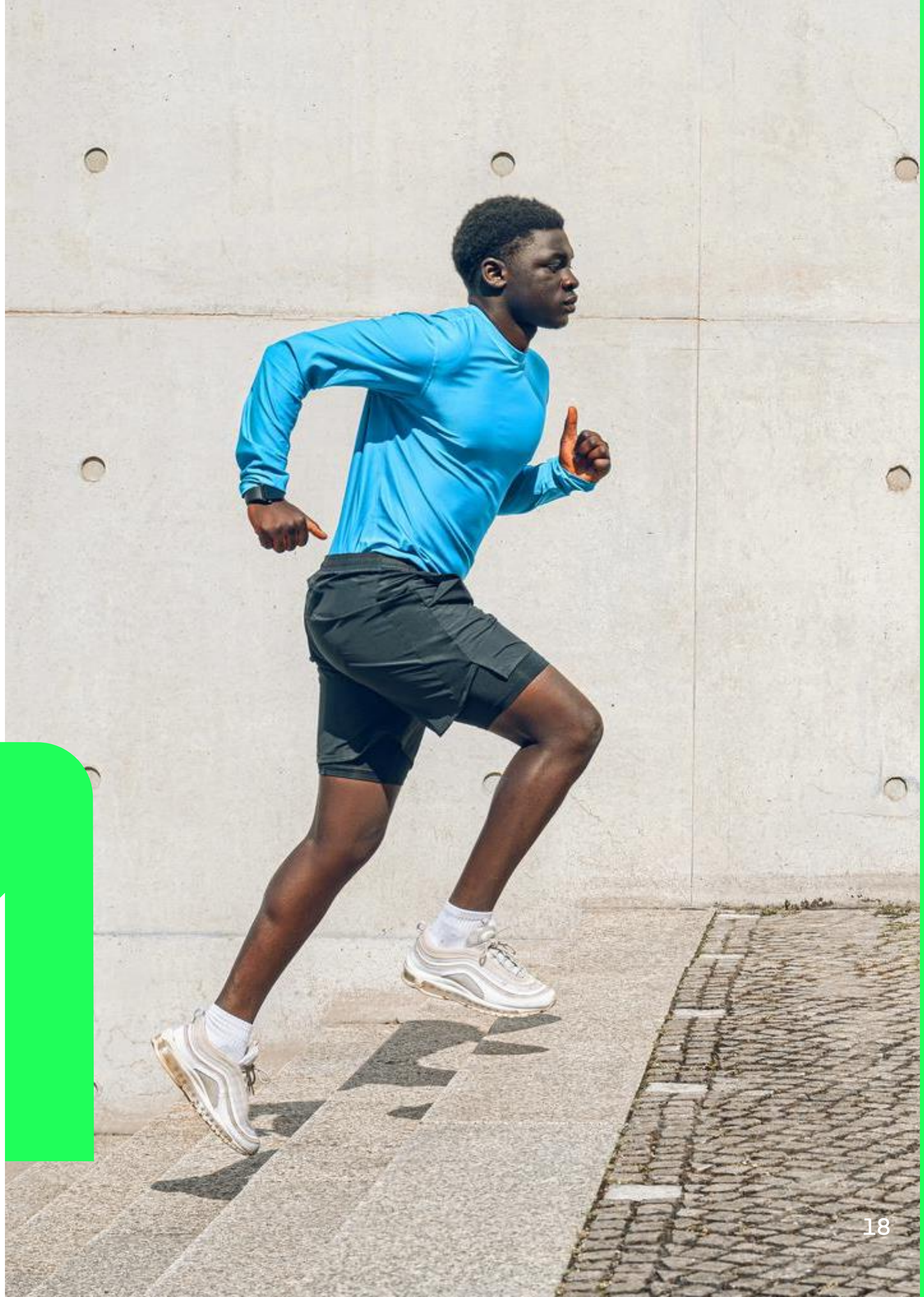
Future value drivers

- Neptun Deep and energy growth projects
- Drive chemicals growth through Borouge International
- OMV Petrom to develop into an energy transition leader in SEE
- Capture opportunities in sustainable mobility, in particular SAF and EV, and chemical feedstock
- Achieve net zero by 2050

Attractive shareholder distributions

OMV's investment case

- Drive **agile transformation** and pace investments in sustainable businesses in line with market demand
- Drive **growth** in **Energy, enhance value in Fuels**, and **build world-class position with Borouge International** in Chemicals
- Significant **increase of free cash flow by 2030**
- **Attractive and robust dividend policy**, thanks to integrated business model and substantial Borouge International dividends more resilient to commodity price volatility



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Successful performance and financial steering framework

Cash Flow

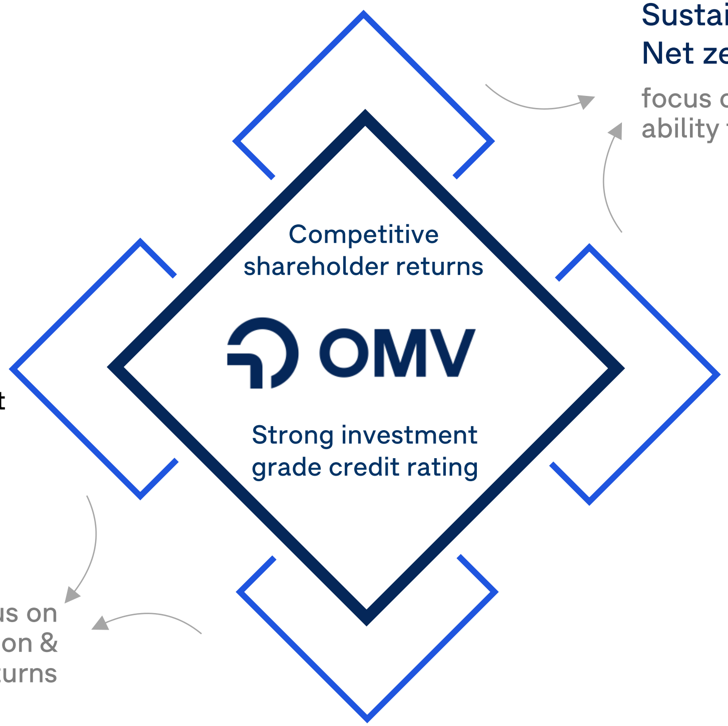
Strong OCF and Capex discipline to achieve positive (organic) free cash flow after dividends

Sustainability
Net zero 2050

focus on resilience & ability to transform

Profitability

Growing clean CCS net income attributable to stockholders / clean CCS EPS



Balance Sheet

Mid/Long-term: Leverage ratio <30%

focus on Value Creation & Shareholder Returns

Value

Clean CCS ROACE ≥12%

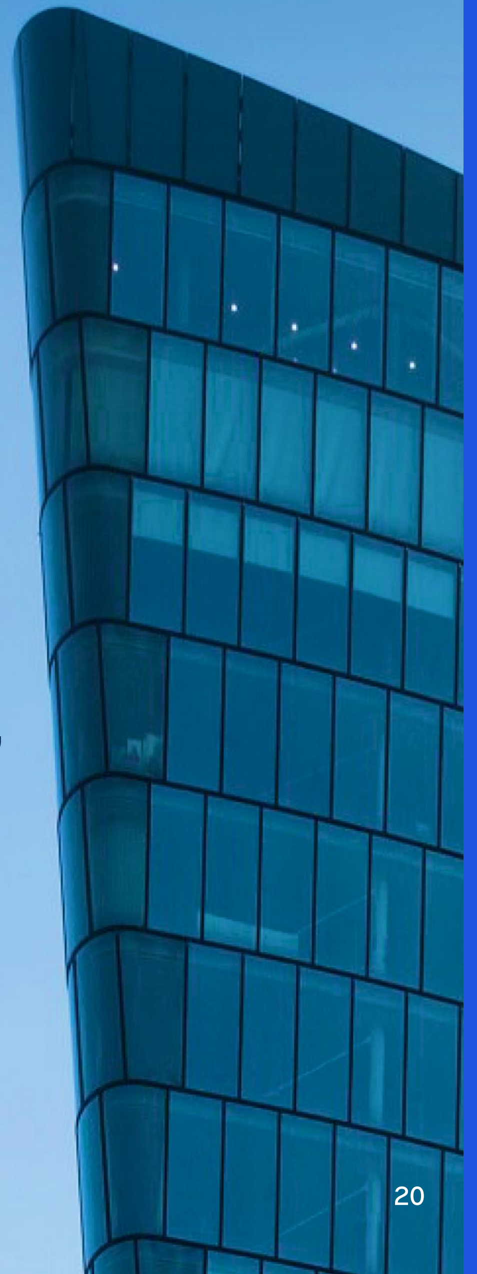
Value oriented financial steering framework

Strong results and cash generation

Strong balance sheet

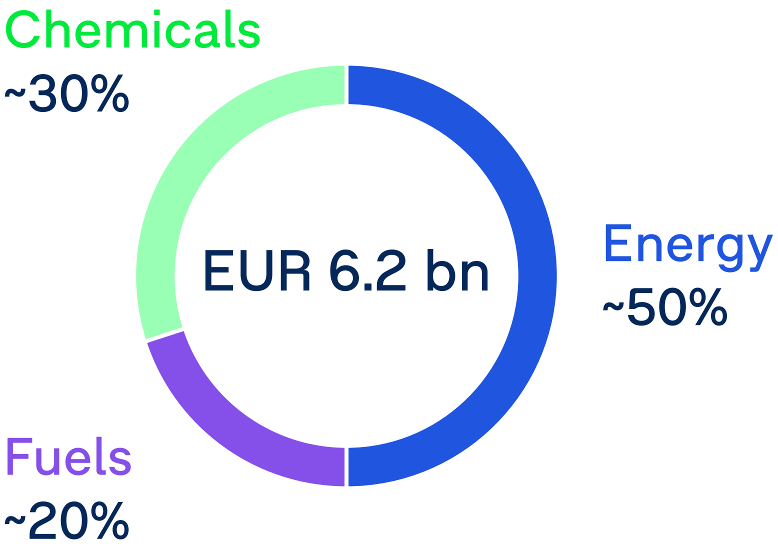
Investment grade credit rating: Fitch A-, Moody’s A3

Competitive shareholder returns

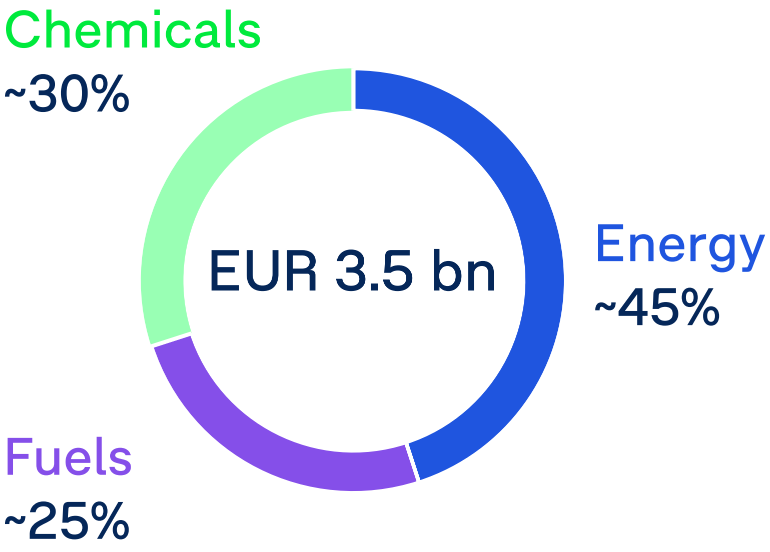


Integrated model delivering strong cash flow

Cash flow from operating activities 2021-2025 average[1]



Organic capex 2021-2025 average



13%

Clean CCS ROACE Average 2021-2025

+18%

Dividend per Share CAGR 2021-2025

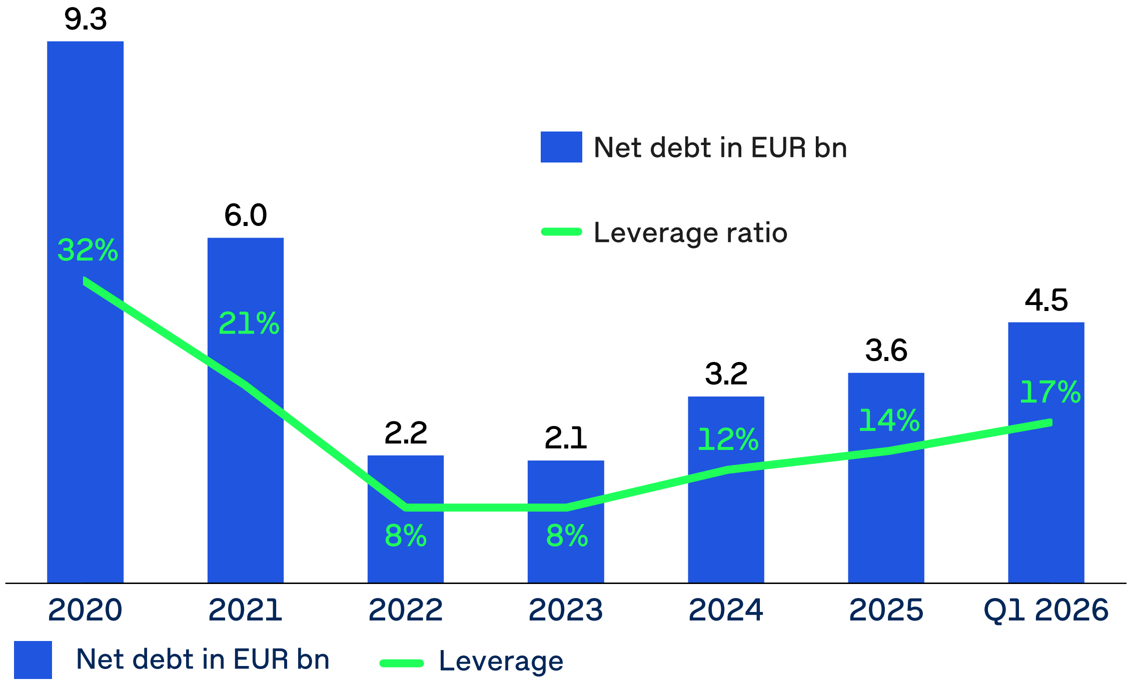
1 incl. NWC effects

Strong capital structure underpins growth, transformation and shareholder distribution

- Strength of balance sheet results in **ample financing capacities** and **growth headroom**
- **Disciplined spending approach** with clearly defined investment criteria
- Confirm commitment to maintain **investment grade credit ratings**
- Post Borouge International, leverage ratio impacted by **deconsolidation of Borealis'** equity and net debt, as well as the **EUR 1.5 bn capital injection**

MOODY'S	FitchRatings KNOW YOUR RISK
A3	A–
Outlook stable	Outlook stable
July 23, 2025	July 15, 2025

Healthy balance sheet
EUR bn, %



Note: Leverage ratio = Net Debt / (Equity + Net Debt)

Borouge International - Transaction overview

Transaction closed on March 31, 2026

All-share combination of Borouge and Borealis to create **Borouge International**

OMV injected **EUR 1.5 bn** cash into Borouge International to equalize ownership

Borouge International acquired NOVA Chemicals for an EV of **USD 13.4 bn**, funded through acquisition debt

Joint control - equal shareholding and joint governance between OMV and XRG

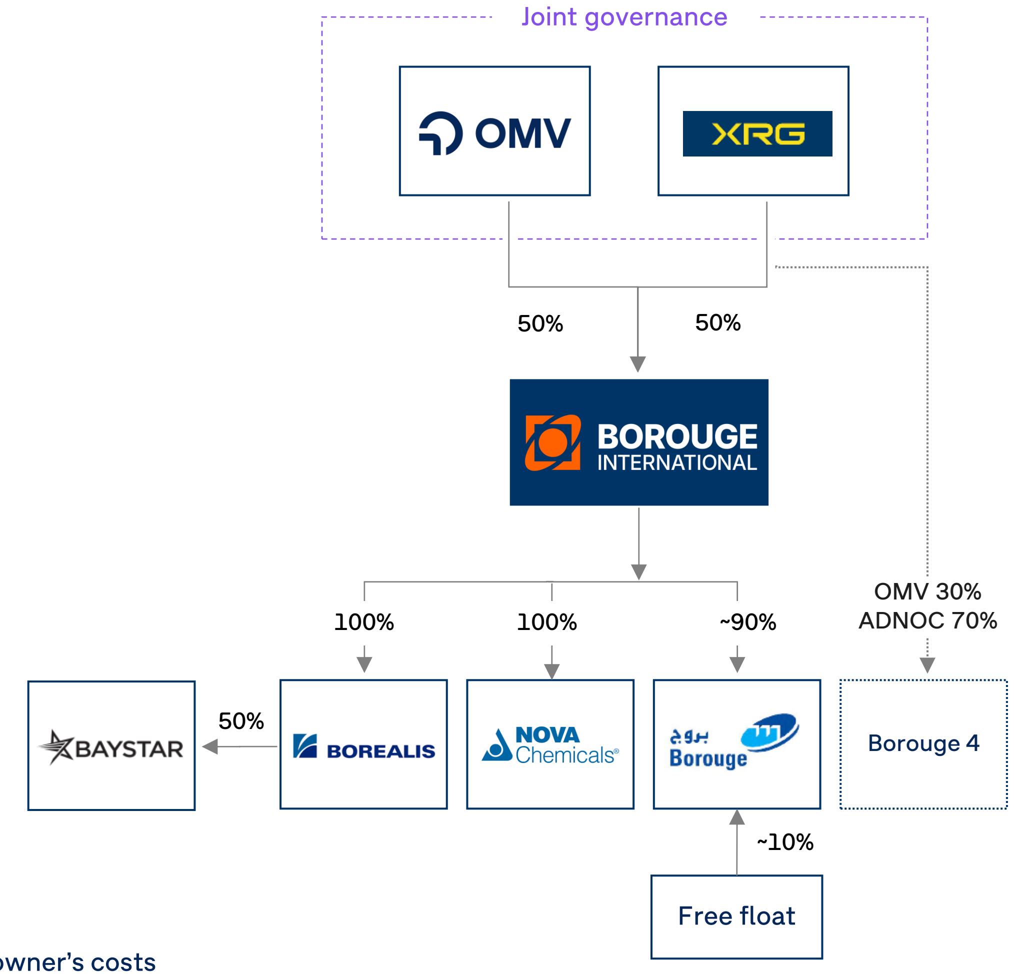
To be listed in Abu Dhabi with a future dual listing in Vienna

Cash capital increase by Borouge International for up to USD ~4 bn to augment investment grade credit rating and achieve inclusion in the MSCI index

Recontribution of Borouge 4 at cost[1], estimated of USD ~7.5 bn, **not before 2029.** Shareholders retain flexibility on the timing and funding mix

Borouge International ownership structure

As of May 2026



1 Cost is defined as adjusted net book value and includes aggregate expenses and investments, financing costs and owner's costs

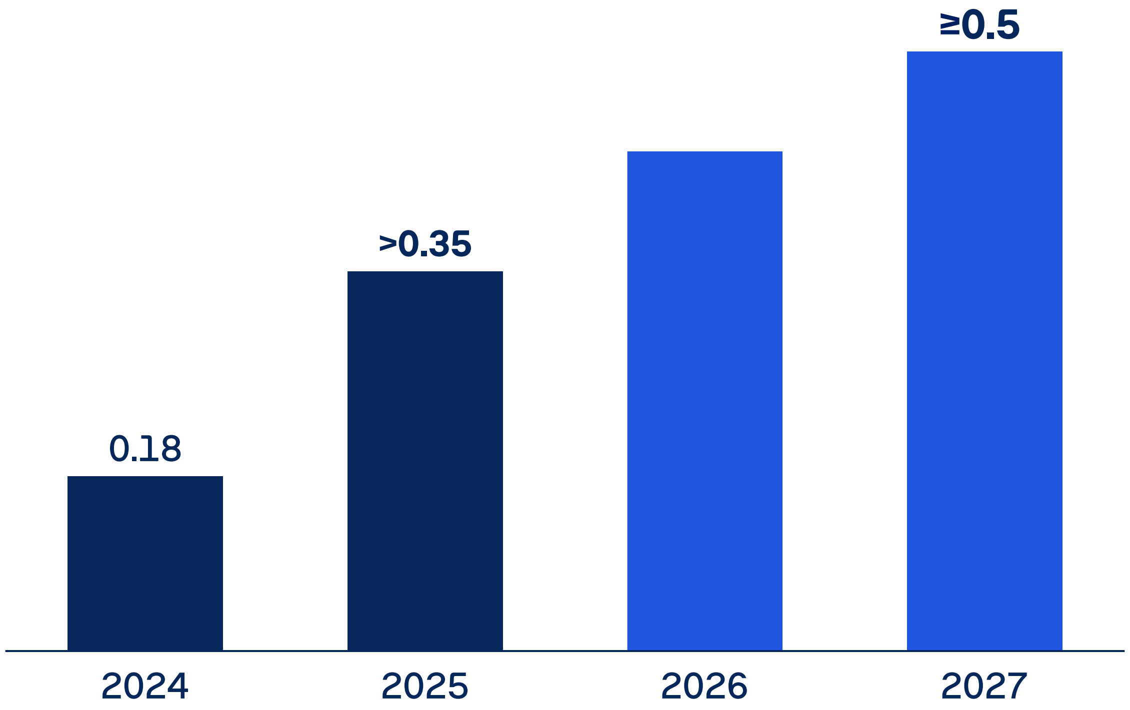
Impact of the Borouge International transaction on OMV's main financial indicators

	Pre-Borouge International	Post-Borouge International
Clean CCS Operating Result	100% Borealis clean CCS Operating Result 50% Baystar clean net income 36% Borouge PLC net income	50%[1] Borouge International clean net income
Operating cash flow	100% Borealis operating cash flow Borouge dividend net to OMV Baystar dividend net to OMV	Borouge International dividend net to OMV
Clean CCS EPS	75% Borealis clean CCS EPS 37.5% Baystar clean CCS EPS 27% Borouge PLC clean CCS EPS	50%[1] Borouge International clean EPS
Organic CAPEX	100% Borealis	Borouge International CAPEX not shown in OMV consolidated numbers
Balance sheet items	100% Borealis full consolidation Baystar and Borouge reflected in equity-accounted investments	50% of Borouge International investment value[2] reflected in equity-accounted investments

1 Before equity market capital increase
2 Investment value at initial recognition determined based on the sum of the fair value of Borealis (75%), equalization payment, transaction costs, and the previous 27% share in Borouge

Group-wide efficiency measures of EUR >350 mn delivered in 2025

Impact on cash flow from operating activities[1]
EUR bn



1 Compared to 2023

Main initiatives in 2025

- Additional oil volumes via technical improvements and optimization of gas flows
- Reduction of E&P cost base via maintenance optimization, shared logistics and active non operator role in technical studies and renegotiations
- Various margin improvement measures and refining optimization related to utilities, crude supply and energy efficiency as well as growth in aviation business

Financial targets with focus on value creation and shareholder returns while decreasing emissions

EUR >6.5bn
2030 clean CCS Operating Result

Clean CCS ROACE ≥12% in the mid-to long-term

EUR >6.0bn
2030 operating cash flow[1]

<30% Leverage ratio and a strong investment credit rating

>9.0EUR/share
2030 clean CCS Earnings per Share

Organic and inorganic growth guided by clearly defined investment criteria, maintaining leverage ratio <30%

EUR ~2.8 bn[2]
average organic CAPEX p.a. in 2026-2030, thereof 30% in sustainable projects

Progressive dividend policy and additional variable dividend framework

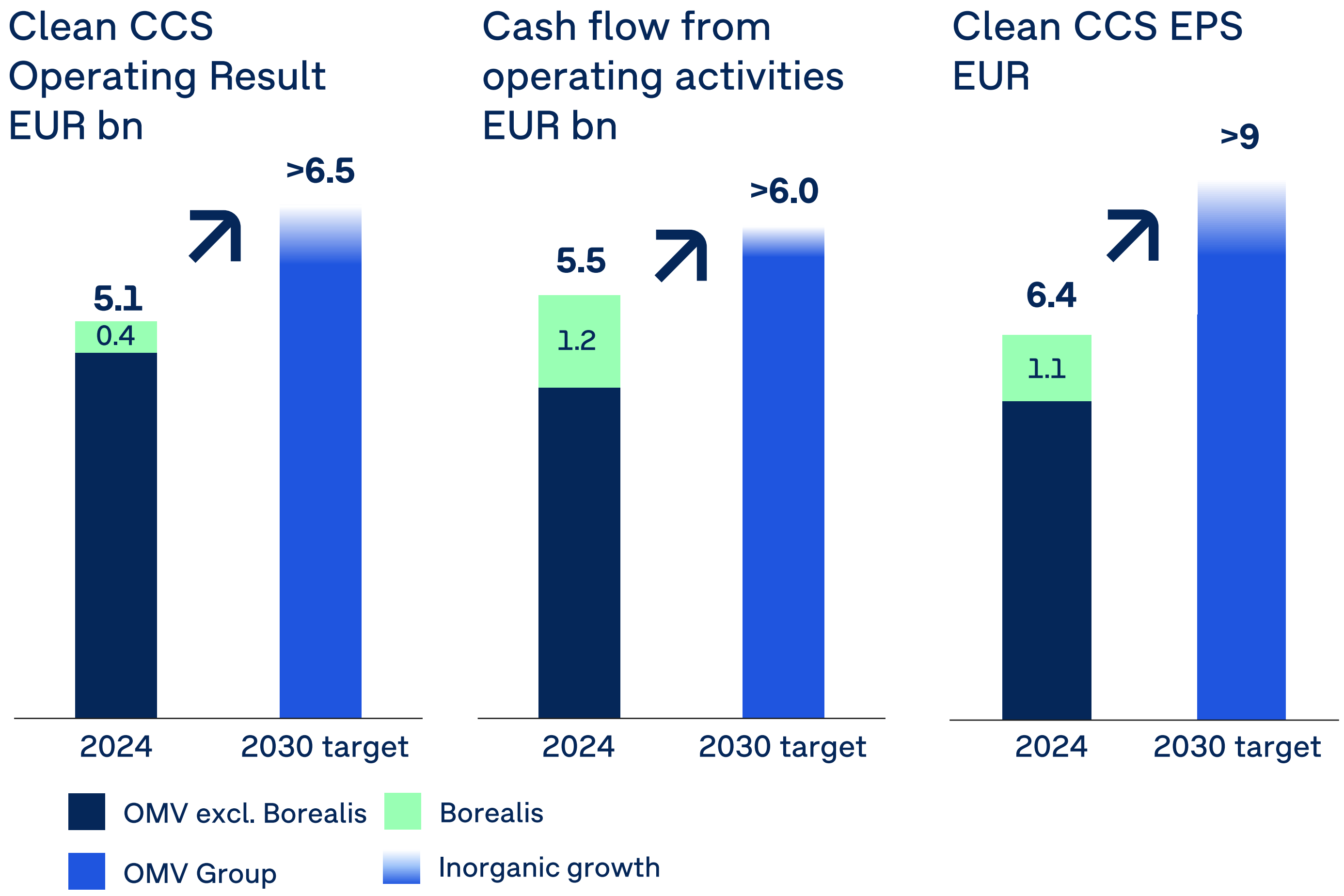
ESG (2030 vs 2019)

- -30% ↘ Scope 1&2 mt CO_2e
- -20% ↘ Scope 3 mt CO_2e
- -10% ↘ Carbon intensity gCO_2e/MJ

Targets updated to reflect Borouge International transaction, adjusted pace of sustainable investments, and revised market outlook.

1 incl. NWC 2 incl. non-cash effective CAPEX

Resilient, higher quality cash flow and growing earnings



2030 targets price assumptions: Brent at 75 USD/bbl; TTF at 25 EUR/MWh

2030 targets recalibrated to reflect strategic portfolio evolution and market dynamics:

- Borouge International deal: Borealis deconsolidation → Borouge International reflected via share of net income/dividend
- Updated Brent price assumptions
- De-risked transformation by aligning sustainable investments with market trends

Highly resilient operating cash flows:

+/- 10 USD/bbl Brent - +/-EUR 210 mn

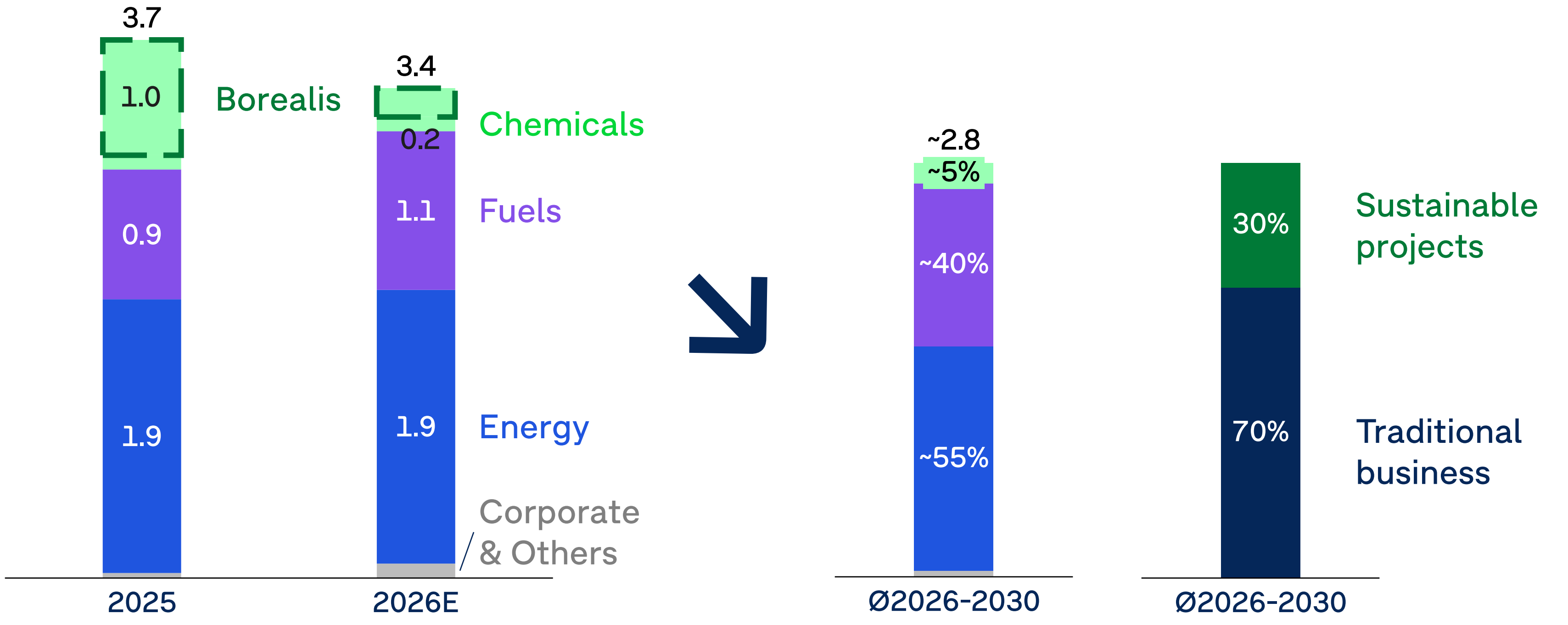
+/- 5 EUR /MWh THE - +/-EUR 260 mn

De-risked Chemicals operating cash flow through Borouge International dividends, which is free cash flow

Inorganic growth opportunities represent additional potential upside

CAPEX reduction until 2030 driven by Borouge International deal and enhanced discipline

Average annual organic CAPEX[1]
EUR bn



Note: Borealis is still included in the 2026E organic CAPEX for Q1/26 but will not be included anymore thereafter.
1 Incl. non-cash effective CAPEX related to leases;

2026 capex still elevated due to the Neptun Deep project

70% growth project share of average total group organic CAPEX

Organic and inorganic growth projects must meet strict investment criteria - min. required IRRs and payback periods

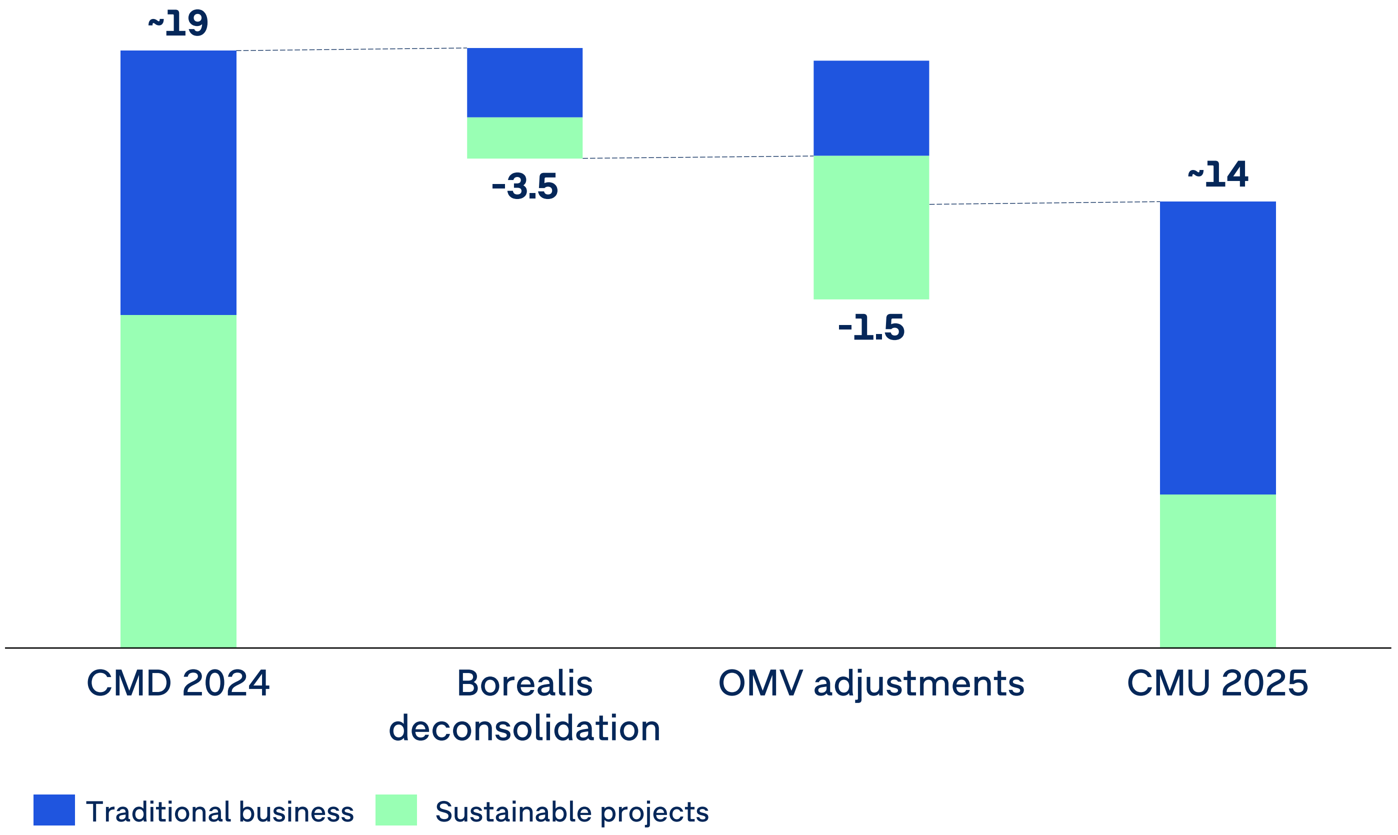
Sustainable capex: 75% Fuels and Chemicals and 25% Energy

Main Sustainable projects: Green hydrogen | SAF HVO | Geothermal | Renewable electricity

All sustainable projects must deliver double digit returns

De-risking transformation by adjusting pace of sustainable investments

Cumulative Organic Capex 2026-2030



Borealis deconsolidation due to formation of Borouge International

Pacing investments for sustainable projects until 2030 while keeping overall direction unchanged

Higher emphasis on traditional business with focus on strengthening of E&P project pipeline

Free cash flow maximization

Competitive sustainable projects rates along the traditional businesses

		Energy	Fuels	Chemicals	Sustainable projects (all segments)
IRR minimum (%)[1]	Investment grade countries	≥12	≥10	≥10.5	≥10
	Non-investment grade countries	≥16	≥13	≥13	≥12.5
Payback period (years)		<10	<10	<15	<15
Overall Group target	Clean CCS ROACE ≥12%				

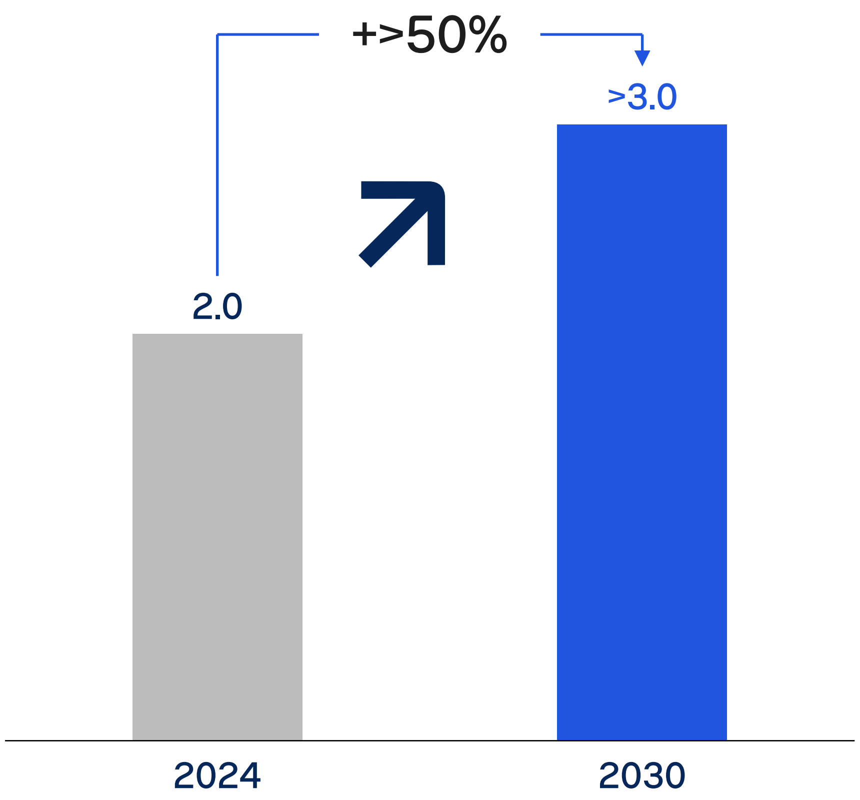
E&P development projects amortization requirements

- Liquids before 2040

1 Minimum IRR depends on the individual country WACC and can go above 20% for non-investment grade countries in the traditional Energy business

From investment to returns: Organic free cash flow to grow sharply

Organic free cash flow
EUR bn



- Capex to come down as of 2028 due to elevated investments in the short term
- Major organic growth projects become operational in the next 1-3 years
- Higher cash flows and lower capex leading to substantial free cash flow increase

Capital allocation priorities: stronger focus on shareholder returns

01
ORGANIC CAPEX

Balanced investment portfolio framed by strict capital discipline

02
ATTRACTIVE AND RELIABLE SHAREHOLDER RETURN

Competitive shareholder distributions via progressive regular dividend, plus an additional variable dividend when leverage ratio is below 30%, linked to operating cash flow and including a substantial share of Borouge International dividends attributable to OMV

03
M&A TO ACCELERATE GROWTH AND TRANSFORMATION

Further growth and value creation guided by strict investment criteria

04
DELEVERAGING

Mid/long-term target ratio below 30%; maintain investment grade credit rating

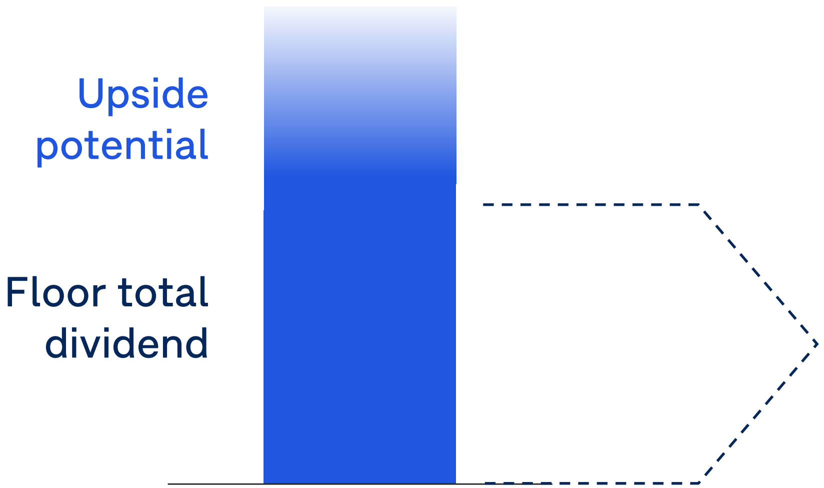
Upon completion of M&A in case leverage >30%

Dividend policy update integrating benefits from Borouge International transaction

- Principle of **progressive regular plus additional variable dividends maintained**, with adjusted distribution base
- OMV **aims to increase regular dividends every year** or at least to maintain the level of the respective previous year.
- Award additional variable dividends when leverage ratio is <30%
- Starting with the financial year 2026, **OMV will distribute 50% of Borouge International dividends attributable to OMV plus 20-30% of cash flow from operating activities excluding Borouge International dividends** attributable to OMV (paid in 2027)

OMV's shareholder distributions will be strengthened mid-term by substantial dividends

Total Borouge International dividend
USD bn



OMV

USD ~1.0 bn [3]

Net floor dividend to OMV

Floor USD 1 bn dividend stream for OMV, with substantial upside potential

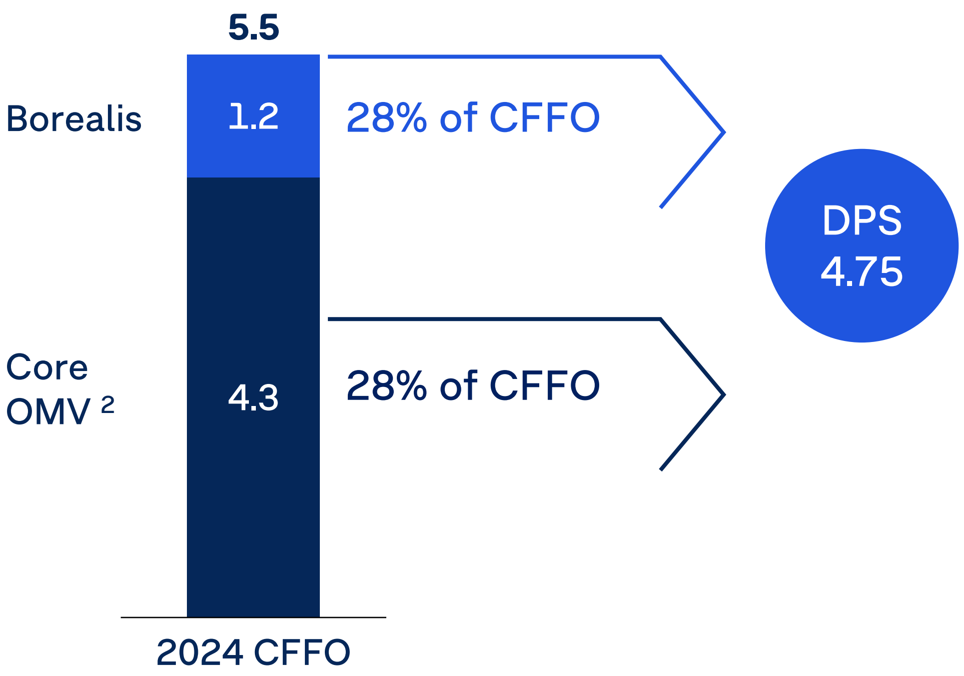
Borouge International dividend policy:

- 90% of net income[1]
- Upside based on free cash flow[2]

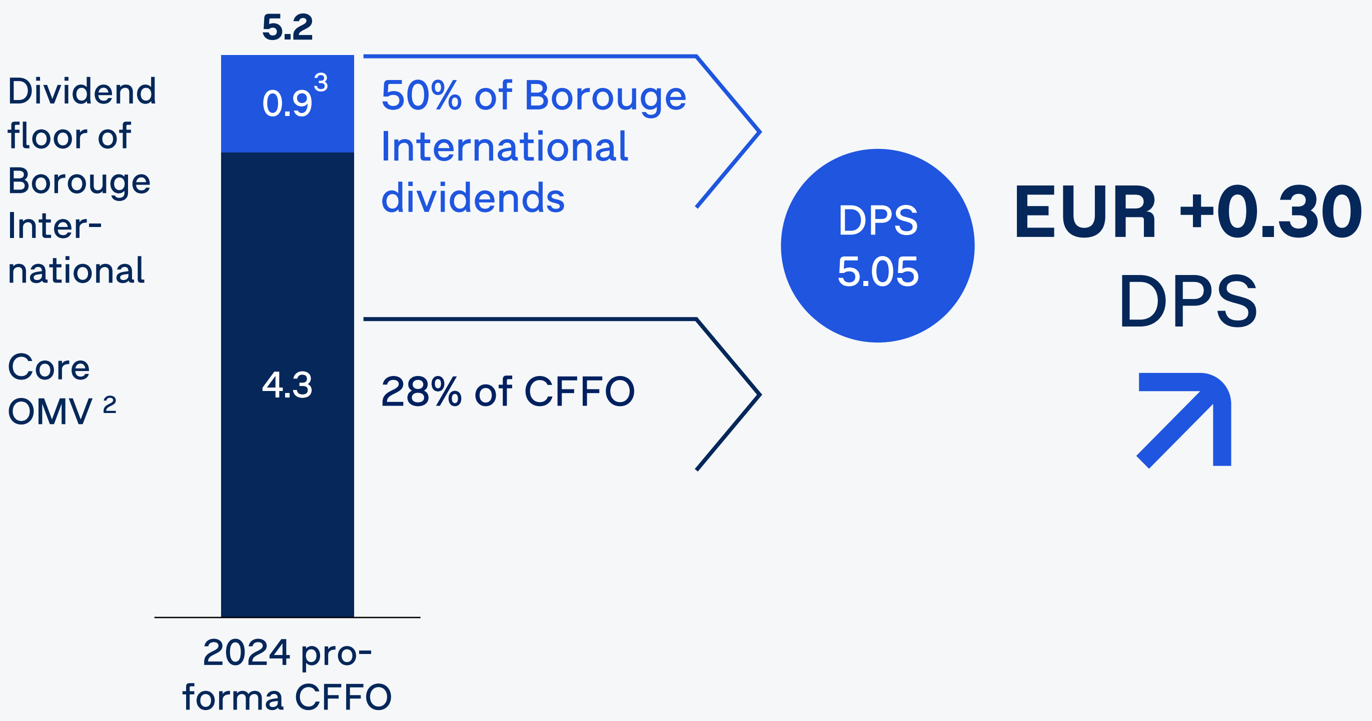
1 Calculated as reported net income and shall exclude costs and one-off effects (being positive or negative) including impairments and PPA effects associated with the transactions or future transactions from the calculation
2 Calculated as free cash flow post interest and working capital changes but before principal repayment costs
3 Dividend to OMV in 2026 was decreased to USD ~0.5 bn

Increased value for OMV shareholders mid-term through more robust and resilient dividend policy

Previous dividend policy[1]
EUR bn

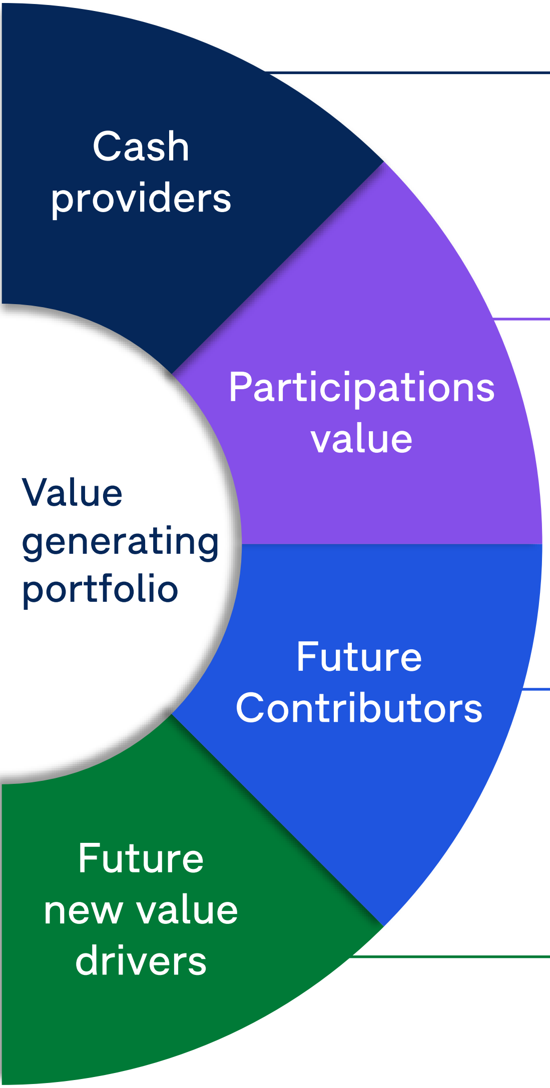


New dividend policy
EUR bn



1 OMV's previous dividend policy stated that 20–30% of CFFO will be distributed.
2 Core OMV includes OMV crackers, Fuels and Energy
3 Floor dividend net to OMV USD 1 bn; however, reduced in the first year to USD ~0.5 bn

OMV provides value generation in a future oriented portfolio



Integrated business covers 3 sectors

- Oil & gas E&P; gas marketing and power
- Refining and marketing
- OMV base chemicals and Borouge International

Stock listed participations

- OMV Petrom
  - Listed on BSE, fully consolidated
  - OMV share 51%
  - EUR 12 bn market cap (EUR 6.1 bn net to OMV)[1]
- **Planned: Borouge International incl Borouge 4 - to be ADX and ATX listed, at-equity consolidated**

Growth projects with expected near-term contribution

- Neptun Deep (50% OMV Petrom)
- Development projects in Austria, Norway, Middle East and North Africa
- Sustainable mobility: SAF/HVO in Romania and Austria
- Renewable power in Romania

Focused investments into projects with attractive returns

- Geothermal
- Circular Economy
- Future M&A / strategic investments

1 As of May 8, 2026

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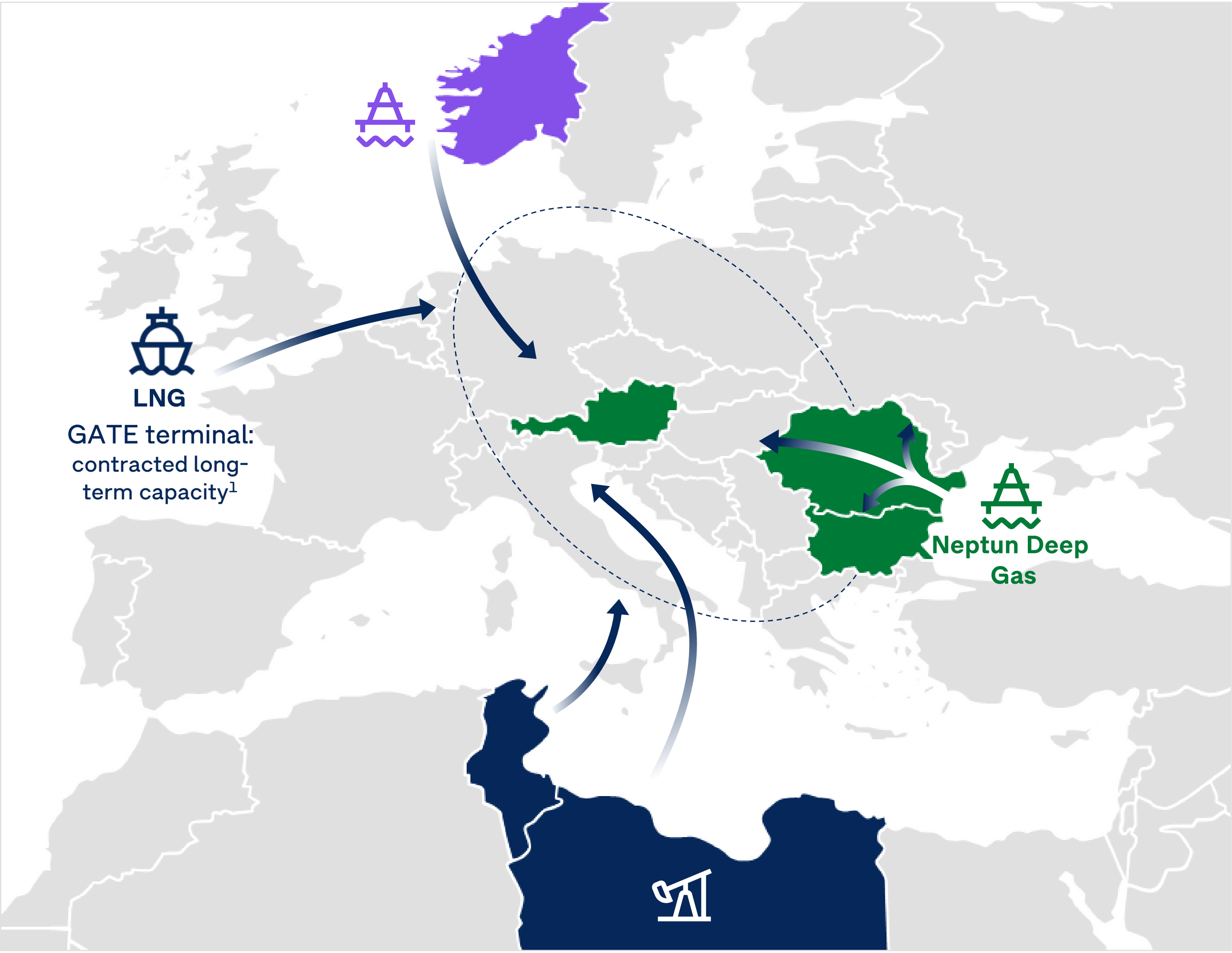
Grow gas and selectively advance renewables

Become a leading producer of gas for our European core markets

Adjust pace of renewable investments, while keeping the overall strategic direction unchanged

OMV to become a leading producer of gas for our core European markets



North

- High-grade portfolio with growing equity gas production
- Extend portfolio longevity and materiality
- Prioritize access to hub assets, as well as growth satellites

CEE

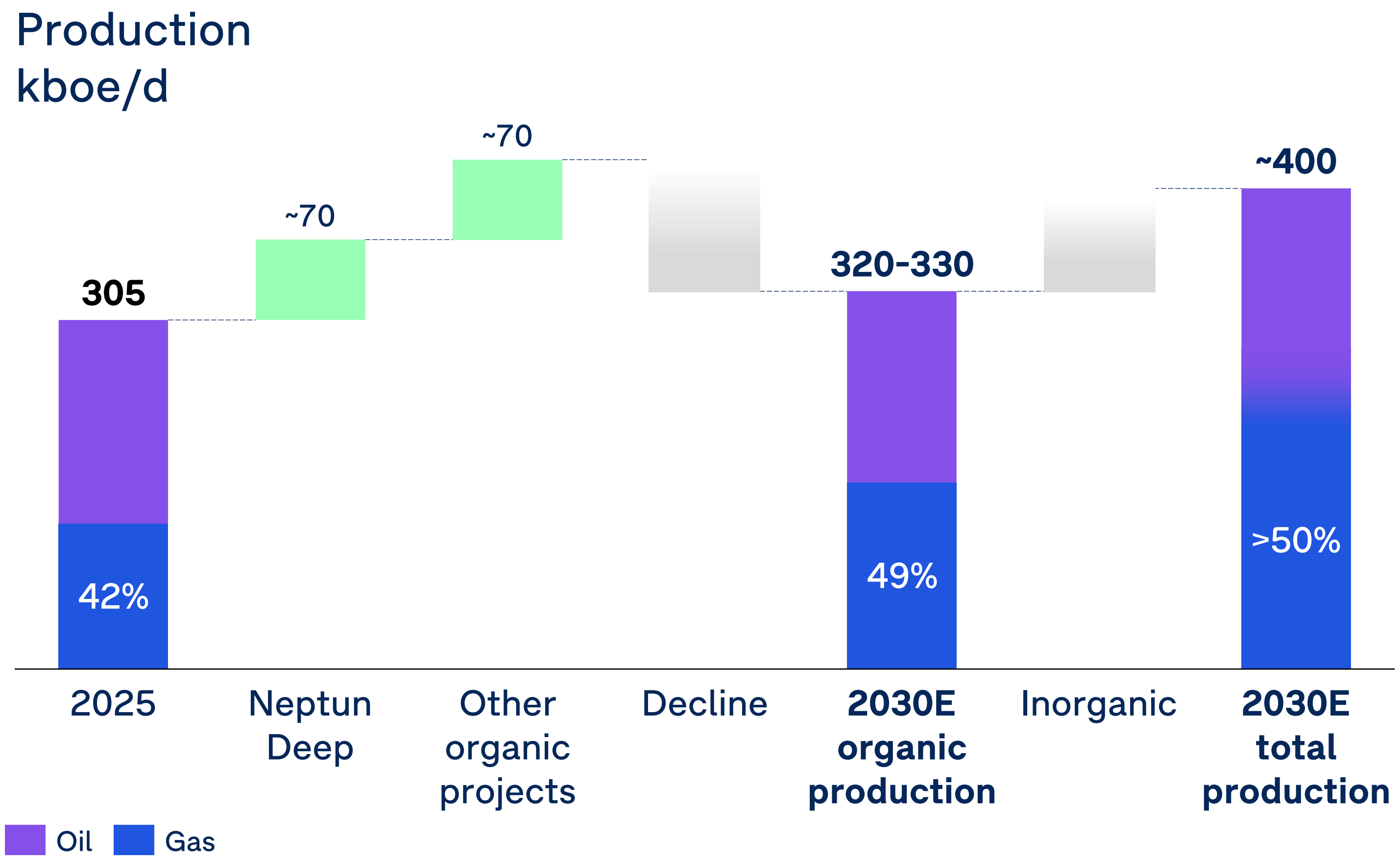
- Grow Black Sea production and resource base through exploration in Romania & Bulgaria

South

- Grow gas production and resource base in North Africa

1 OMV holds a contracted long-term annual capacity of 3 bcm at the GATE terminal in Rotterdam

Growth from significant organic projects complemented by potential inorganic opportunities



Organic growth

- Neptun Deep adding 70 kboe/d at plateau
- Increased pipeline of additional organic growth projects of ~70 kboe/d
- Natural decline partially offset by workovers and infill drilling
- Exploration activity with further upside in organic growth

Potential inorganic growth

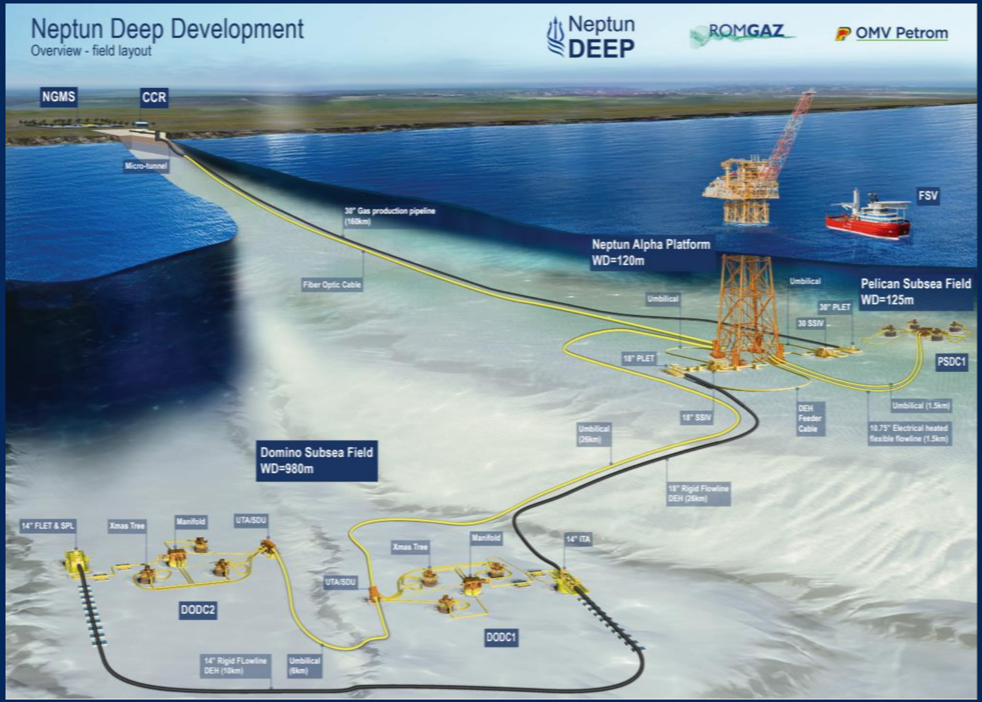
- Cash flow accretive assets with a focus on gas
- Value-driven
- Clear investment criteria

Neptun Deep, the largest offshore gas project in the EU

Operator: OMV Petrom (50%); Partner: Romgaz (50%)

Project Scope

- 10 subsea wells (3 drill centers) and 2 subsea umbilicals
- Shallow water platform with gas dehydration facilities
- 30+ km flow lines to tie-in wells with the platform
- 30” wide x 160 km long main export pipeline to shore
- Onshore metering & control station



~140 kboe/d	USD ~3/boe	up to EUR 4 bn	2.2 kg CO_2/boe
Gross production at plateau (8-10 years)	Production cost	Gross CAPEX	GHG emissions (significantly below global average of ~17)

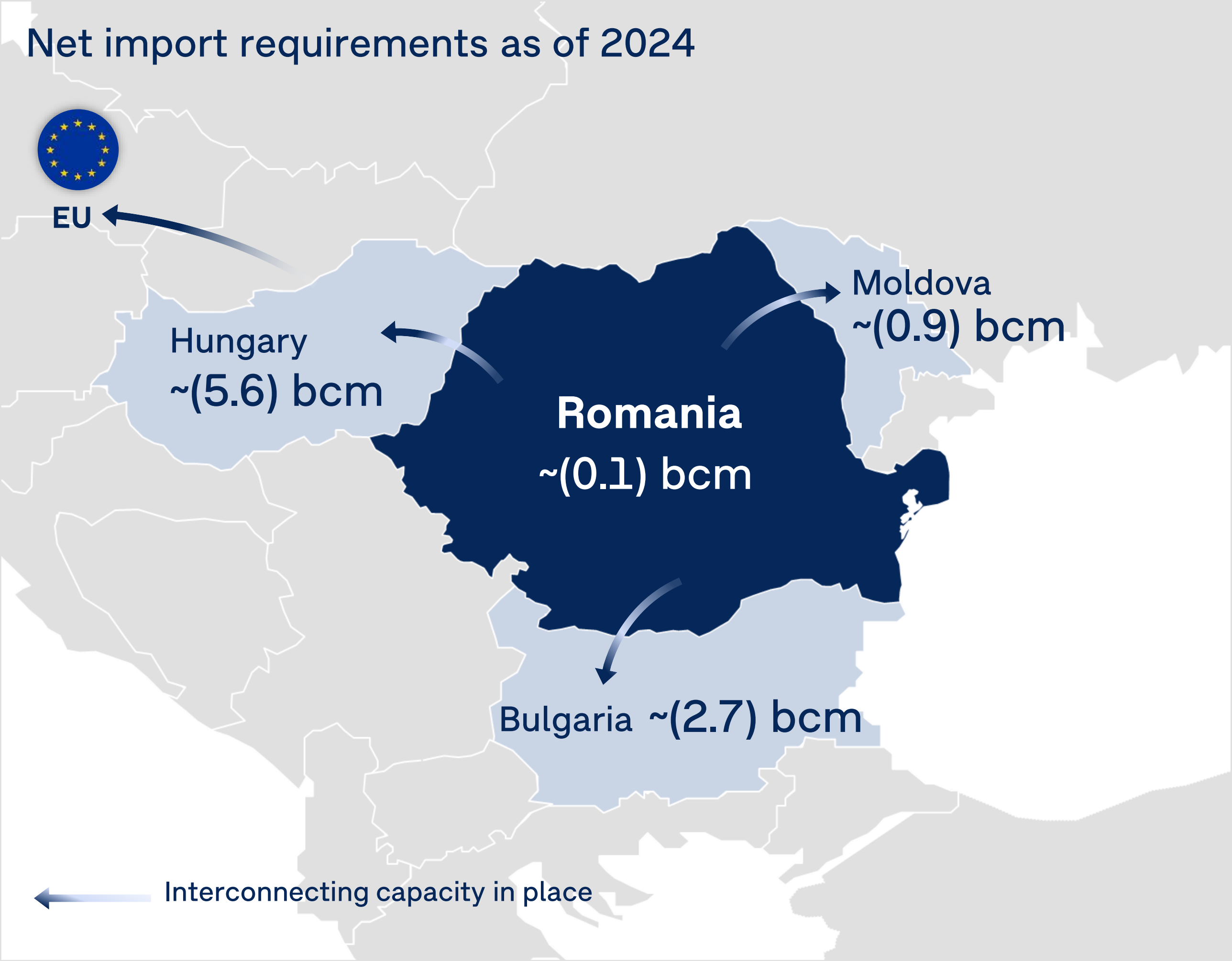
EUR ~0.5 bn

Expected Neptun Deep contribution to OMV Petrom Clean Operating Result in 2030

Neptun Deep Progress

- **06/2023** FID
- **12/2023** De-risked: 80%+ of budget awarded
- **Q4/2024** Drilling rig in Romania
- **12/2024** De-risked: >90%+ of budget awarded
- **03/2025** Spudding first well
- **05/2026: on track & budget** Completed the 4 Pelican South wells; Completed drilling the 6 Domino top holes
- **2027** First gas

Neptun Deep to double Romania's gas output and to enable exports



8 bcm p.a. Neptun Deep plateau production capacity[1]

[1] ~140 kboe/d

- Romania likely to become a net exporter
- Infrastructure in place to export to neighbouring countries and further on to other European countries
- Marketing activities ongoing
  - Signed contract with Uniper (Germany)
  - Signed contract with Energocom SA (Moldova)

Additional organic projects and workovers to manage natural decline until 2030

Selected development projects in addition to Neptun Deep

	Operated		Non-operated	
Gas	**Austria** Wittau		**Libya** Zueitina	
	Norway Berling		**Norway** Gudrun	 Source: Equinor
Oil	**Libya** Nafoora Growth		**UAE** Sarb and Umm Lulu	
Oil & gas	**Romania** by OMV Petrom			

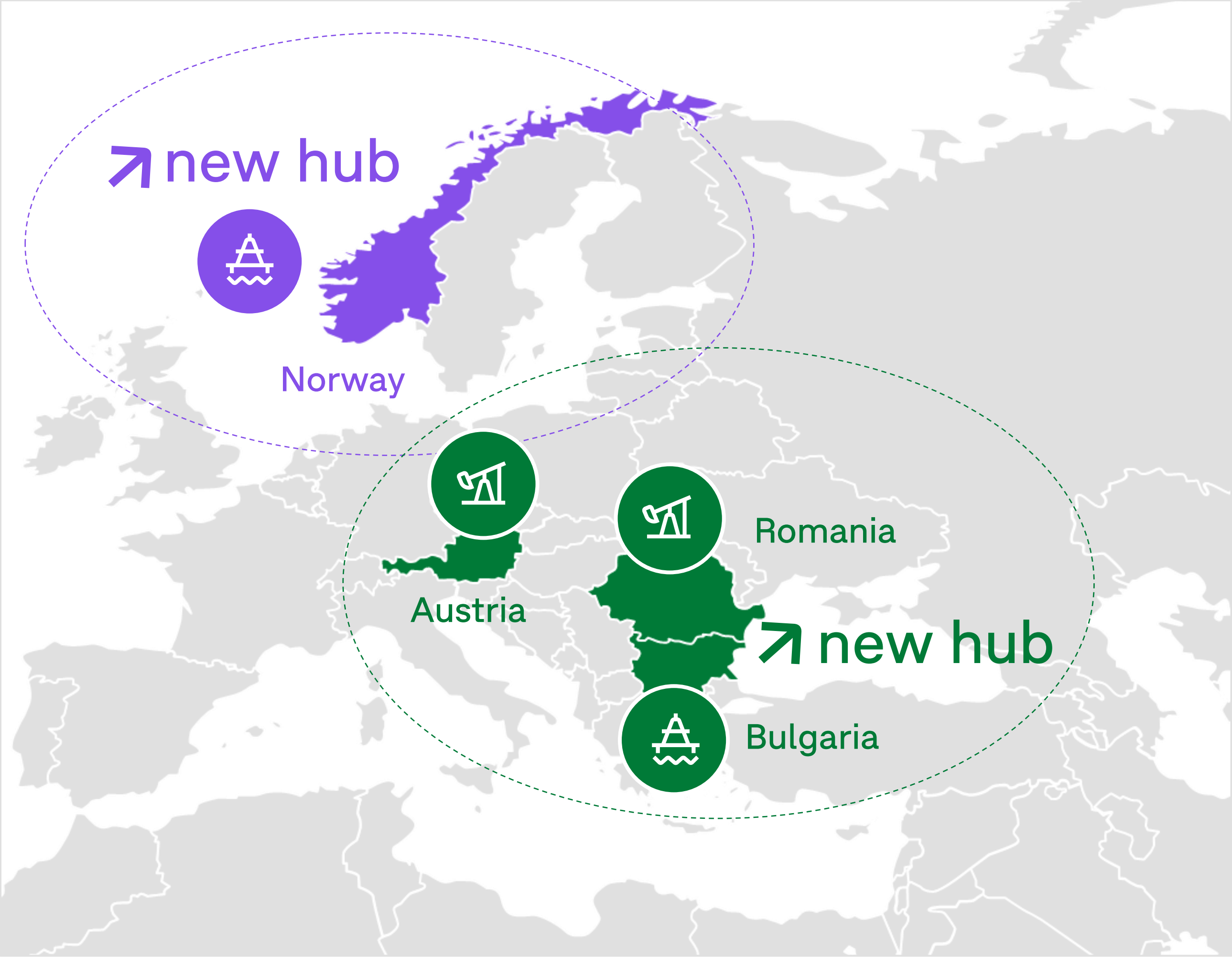
Additional organic production from development projects: ~70 kboe/d in 2030

Well workovers

Recovery maximization

stabilize production

Exploration activity with potential to add volumes by 2030, and further growth potential by 2035



300+
mn boe
risked resource

50+
wells

EUR ~200 mn
expenditure p.a.

- **Value-driven focus** on **infrastructure-led exploration (ILX)** next to existing fields
- **NCS:** The **Haydn/Monn** gas discovery in 2024 indicated significant potential in OMV's focus area, the Voring Basin
- **Black Sea has a significant gas growth potential** with low emissions

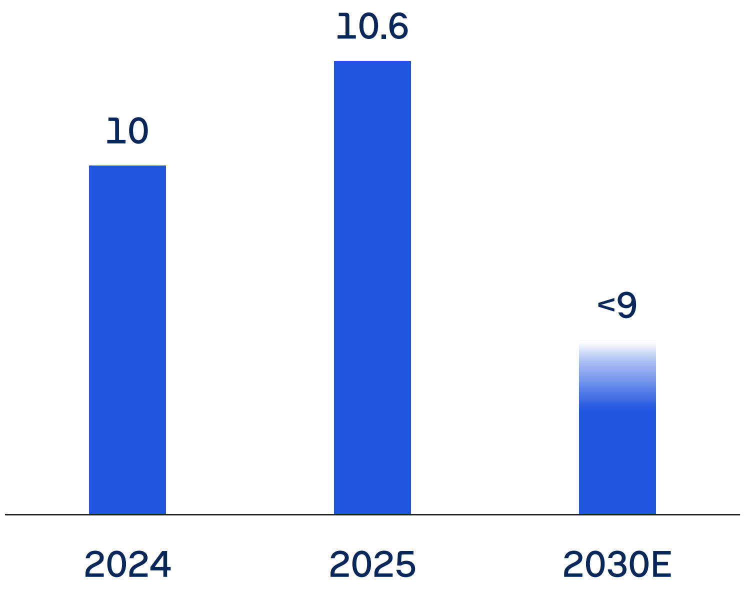
Inorganic growth – a potential upside in case of value accretive opportunities

Target profile

- **Cash-flow accretive assets** to sustain high cash flow generation
- Regional preference **in and around Europe**, focusing on opportunities with gas potential
- **Building on OMV's core strengths and unlocking synergies**
- Inorganic growth **only in case of value accretive opportunities** in a challenging M&A market
- **Potential inorganic growth will remain within the 30% leverage ratio target**

Focus on cost and high-grading of current portfolio

Organic unit cost[1]
USD/boe



<30 USD/boe

2030 Cash break-even

- Strong focus on cost
  - Achieved EUR 110 mn cash flow improvement in 2024 vs. 2023
  - Continue to reduce absolute cost base to offset declining production from mature assets
- Further high-grading the portfolio
  - Optimize Norwegian portfolio
  - Cost efficient decommissioning in New Zealand

1 Excluding SapuraOMV, UAE recycled gas

Gas Marketing and Power – a significant earnings contributor

Storage and LNG
~70 TWh
Storage capacities in Austria and Germany and LNG capacity

- Storage business is fully hedged; profitability is a function of **summer-winter spreads**
- **Signed LNG long-term contracts** with reliable returns

Gas sales
~130 TWh p.a.[1]

- Full diversification of supply sources, without Russian gas
- Strong **supply portfolio in Romania** with a ramp-up in equity gas volumes in 2027 (Neptun Deep)
- Profitability driven by optimization of sales channels

Optimization and Trading

- Supply, transport and storage optimization
- Profitability is a function of **market volatility** (time/location spread)
- Grow asset backed trading

Power production
>6 TWh p.a.[1]

- Benefits from **gas-electricity integration in Romania**
- Profitability driven by power margins and **spark spreads, upsides from balancing services and integration** with renewable power capacities

~300
EUR mn
Average 2026-2030

Clean Operating Result Gas Marketing & Power

1 2030 targets

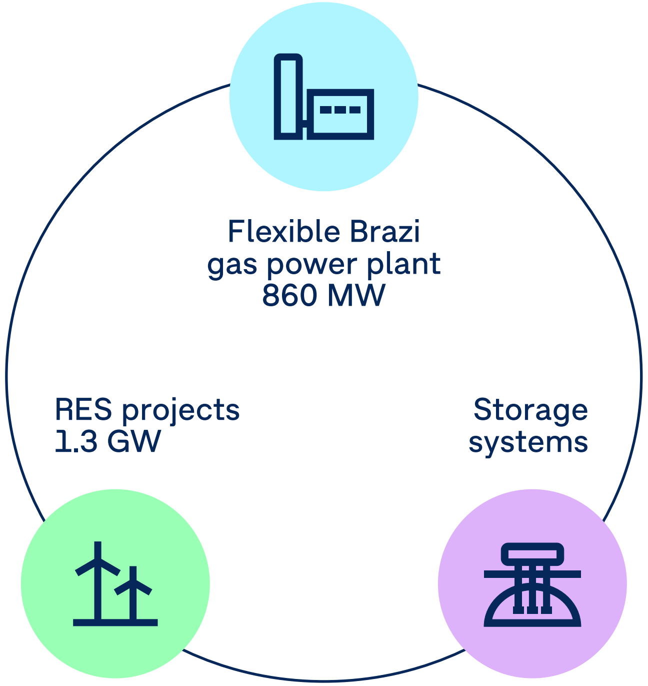
OMV Petrom to become a leading power market player in SEE

Integrated position in Romania

- Invest in renewable energy sources to leverage favorable wind and solar conditions and regulation
- Leverage existing 860 MW gas power plant to reduce variability of produced electricity
- Potentially explore power storage opportunities to further increase flexibility of electricity production
- Projects: CE Oltenia (50%), Teleorman (100%), Renovatio (50%), Isalnita (100%) totaling >2.4 TWh p.a.

Expand to Bulgaria

- Projects: Gabare (50%), ~0.3 TWh p.a.



>1.3 GW[1]

Wind and solar net production capacity p.a. by 2030

>2.4 TWh[2]

Net electrical output p.a. by 2030

~0.7 EUR bn

Total investments OMV Petrom[3] 2026-2030

≥10%

IRR

1 Gross (including partnerships) production capacity >2.5 GW
2 Gross (including partnerships) electrical output >4.7 TWh
3 Including equity injection, shareholder loans and grants

First geothermal plant to start in Vienna in 2028

Existing open loop technology
Vienna & Graz

Produce and recycle hot thermal water from aquifers
(“**we rely on natural reservoirs**”)

- **Vienna (deeep JV with Wien Energie)**
  - **Pilot plant** (20 MW) drilling finished, production tests completed, **start 2028**
  - **Second phase** (60 MW) drilling in 2026, **start 2030**
  - **Plan to scale up to 200 MW after 2030,** equivalent to supplying 200,000 households, around half of Vienna’s households that use district heating today
- **Graz** project – **exploration 2026**

Innovative closed loop technology
New projects

Circulate fluids through a series of closed loops, **potential for scalability**
(“**we create reservoirs**”)

- Exclusive agreements with Eavor as strategic investor
- Eavor is currently testing the commercial viability at the Geretsried site in Germany; electricity production targeted in 2025
- In negotiations with cities in Germany and in Romania
- **First production from OMV projects expected before 2030**

~1 TWh	EUR ~700 mn	≥10%
2030 net production output	OMV organic CAPEX 2026-2030	IRR

Energy – 2030 strategic ambitions

E&P

- Execute on increased pipeline of organic projects
- Focus on cost and efficiencies
- Pursue value-accretive inorganic opportunities that leverage OMV's strengths and unlock additional synergies

Gas Marketing & Power

- Unlock significant value by expanding trading and sales in Europe
- Strengthen profitability by leveraging a multi commodity trading platform – making gas a key enabler in the company's portfolio

Renewables

- Enable OMV Petrom to establish leadership in the power sector across SEE
- Adjust the pace of geothermal energy

~400 kboe/d	<30 USD/boe	<9 USD/boe
Oil & gas production by 2030	Oil & gas portfolio cash break-even by 2030	Organic unit production cost by 2030

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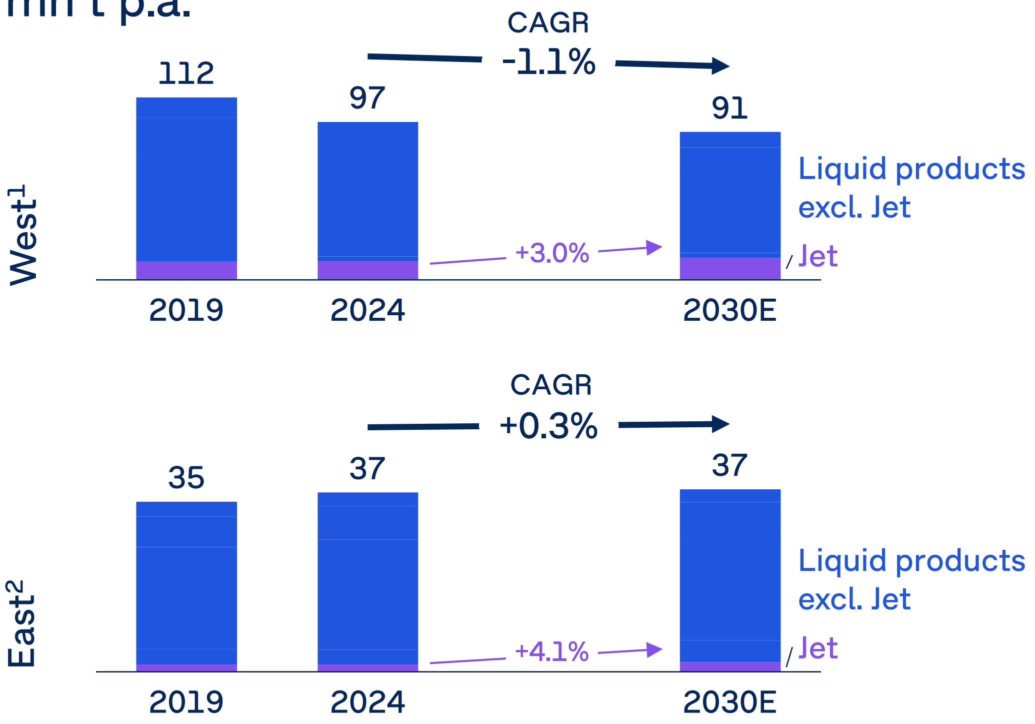
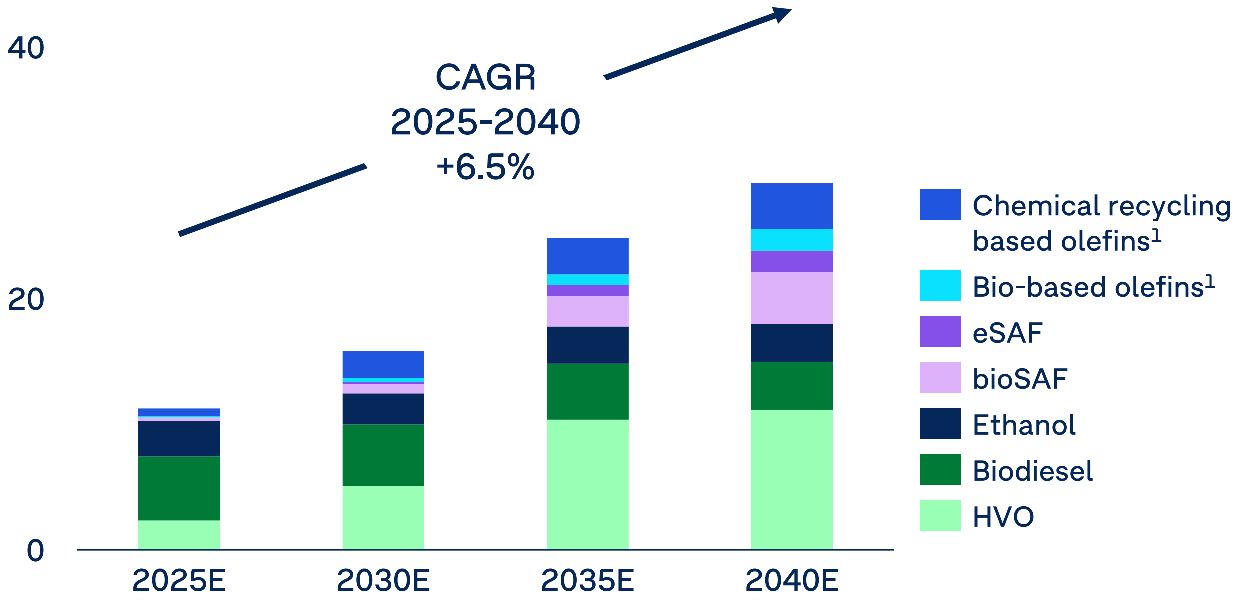
Ongoing sustainable transformation in European fuels and chemicals market

Liquids demand outlook in OMV Markets
mn t p.a.



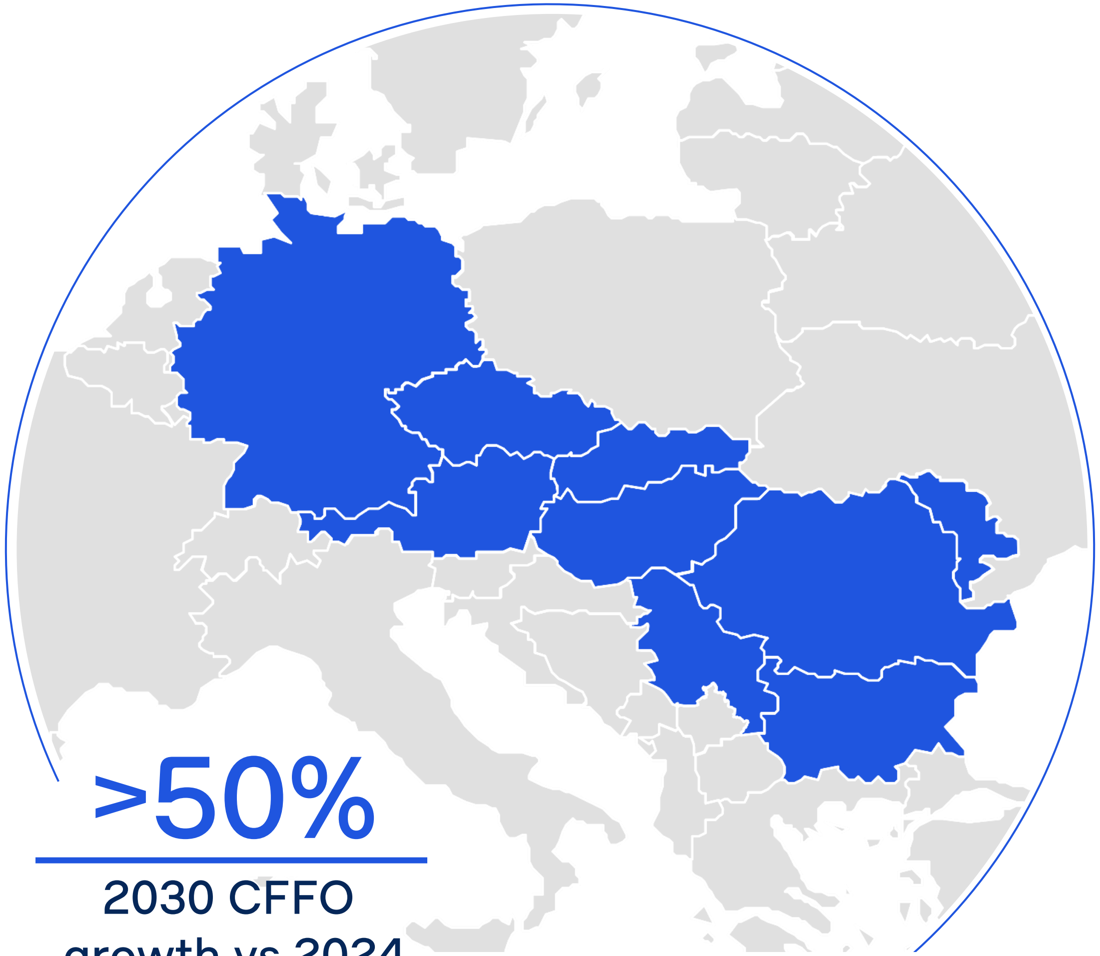
Source: OMV analysis
1 Austria, Germany
2 Czechia, Hungary, Slovakia, Romania, Bulgaria, Serbia, Moldova

Sustainable fuels and chemicals feedstock demand outlook in OMV markets
mn t p.a.



Source: OMV analysis
1 Ethylene and propylene

Strengthen Fuels profitability through integration and customer base expansion



>50%

2030 CFFO growth vs 2024

Maximize integrated margins across the entire value chain and deepen chemical integration

Grow retail contribution by focusing on premium fuels, non-fuel business and eMobility

Expand aviation footprint to new airports and regions to drive growth in jet fuel and SAF sales

Increase direct customer share in commercial road transport

Continue profitable growth in Retail with focus on non-fuel business

- **Multibrand strategy** covering broad range of customer needs from **high-end (OMV)** to **value-for-money (Petrom)** and **discount (Avanti)**
- Strong share of **premium fuels** and **industry leading overall margins**
- **Grow non-fuel business in 2030 by ~70%** vs 2021 through new partnership concept with **convenience retailers** (i.e. Auchan, Billa) and **via own brand** (VIVA)
- **Selective network optimization** via acquisitions and highway sites tenders

~500 EUR mn

Clean Operating Result p.a. average 2020-2024

~1,700

Retail sites in 8 countries

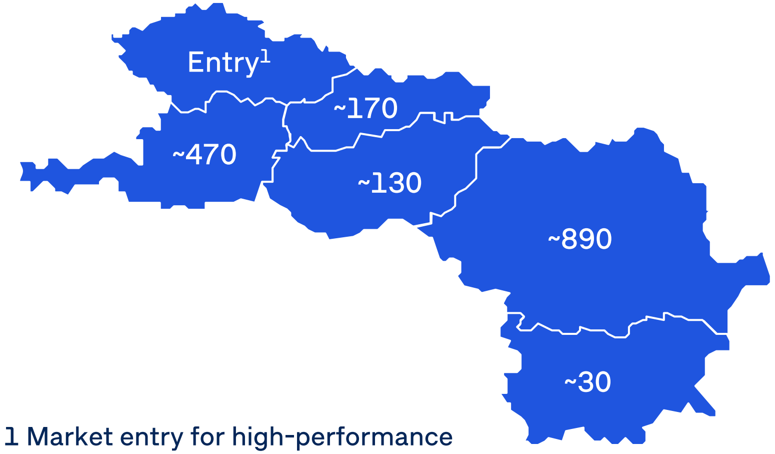
~4% CAGR

Clean Operating Result growth 2024-2030

Expand high-performance EV-charging in CEE region

~640	~1,800	~5,000
May 2024	March 2026	2030

High-performance charging points December 2025



1 Market entry for high-performance EV-charging in 2025

- **Become a top 3 player** in AT, HU, SK, CZ, and BG; leading player in Romania
- Paced ramp-up matching EV demand growth **ensures optimal asset utilization**
- Achieved **positive EBITDA contribution** in Austria; successfully progressing toward profitability in additional markets
- Grow **EV charging infrastructure for heavy-duty vehicles**; Established coverage of key Austrian routes; assessing further cross-sell and expansion opportunities

Grow commercial customer access to secure outlets

Commercial Road Transport

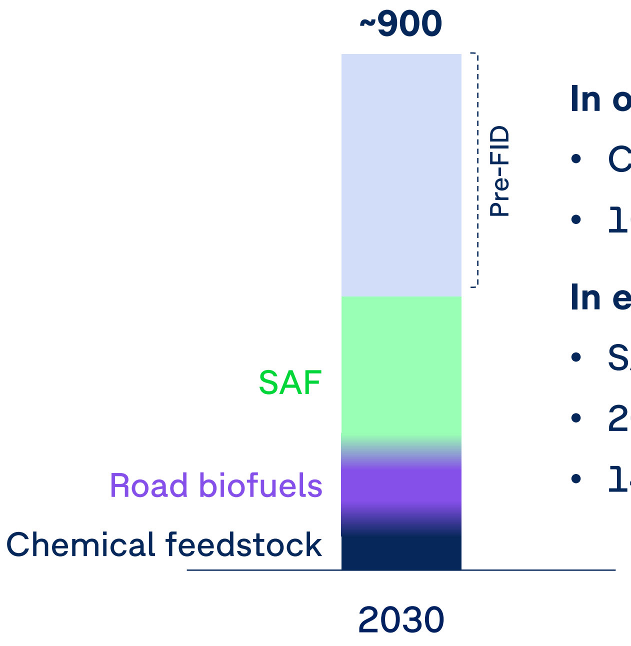
- Increase sales focus on direct customers
- Grow CRT volumes in 2030 by 25% vs 2024 through leveraging specialized network additions and current offerings via retail stations
- Grow direct customers with 360° mobility offer

Aviation

- Expanded aviation footprint to further capture growing jet demand
- Successful pre-marketing of SAF supports security of sustainable investment projects

Capture growth in renewable fuels and chemical feedstock market

Production capacity
kt



In operation

- Co-processing plant, Austria
- 10 MW green hydrogen, Austria

In execution

- SAF/HVO plant, Romania
- 20 & 35 MW green hydrogen, Romania
- 140 MW green hydrogen, Austria

High flexibility in project execution and yield optimization to support margin optimization

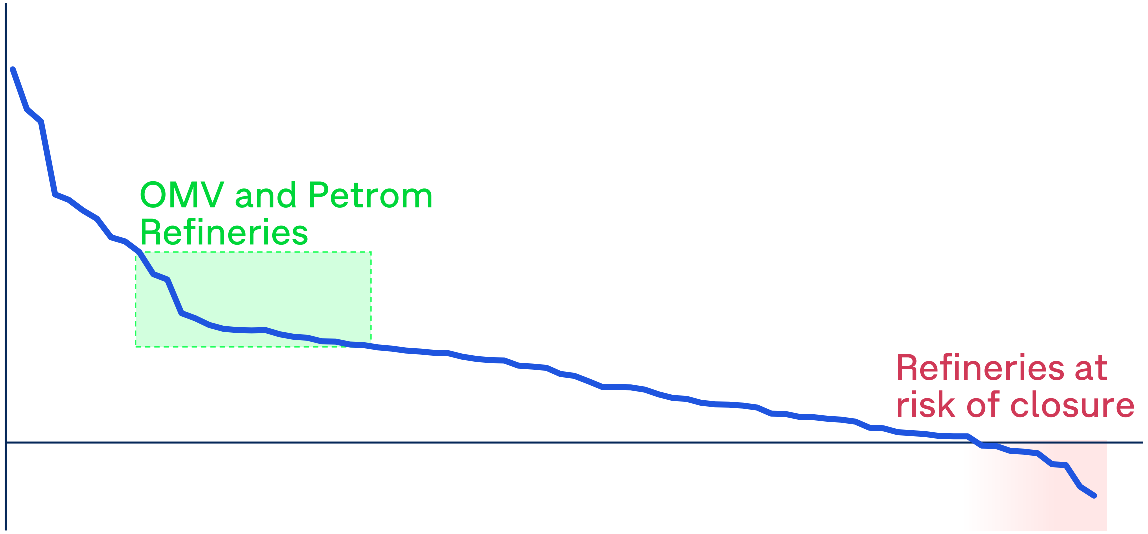
200–300 EUR mn

Clean CCS Operating Result
contribution target in 2030

- Projects need to be paced to reflect market development
- Flexibility in project timings enables potential to maximize market opportunities
- Explore inorganic growth opportunities and strengthen feedstock integration
- Mature technology and processes to benefit from synthetic fuels growth potential after 2030

Refineries consistently recognized as top performer in leading industry benchmarks

Integrated refinery net cash margin (NCM)[1]
NCM, USD/bbl



Source: OMV Analysis and Wood Mackenzie - Europe refinery infrastructure benchmarking August 2025

1 NCM is the difference between the market value of sold refined products and costs associated to refinery operations: crude costs including delivery and OPEX, including integrated chemicals effects.

- Drive **best-in-class integrated asset optimization** and further increase flexibility in supply chains
- **Maximize integrated margins** for traditional fuels across the entire value chain
- **Enhance trading capabilities** via strategic coastal storage positions and **growth in renewable feedstock trading** capabilities

Fuels – 2030 strategic ambitions

Fuels Value Chain

- Transformation in line with market demand and shift to more chemicals
- Maximize integrated margins for traditional fuels across the entire value chain

Marketing

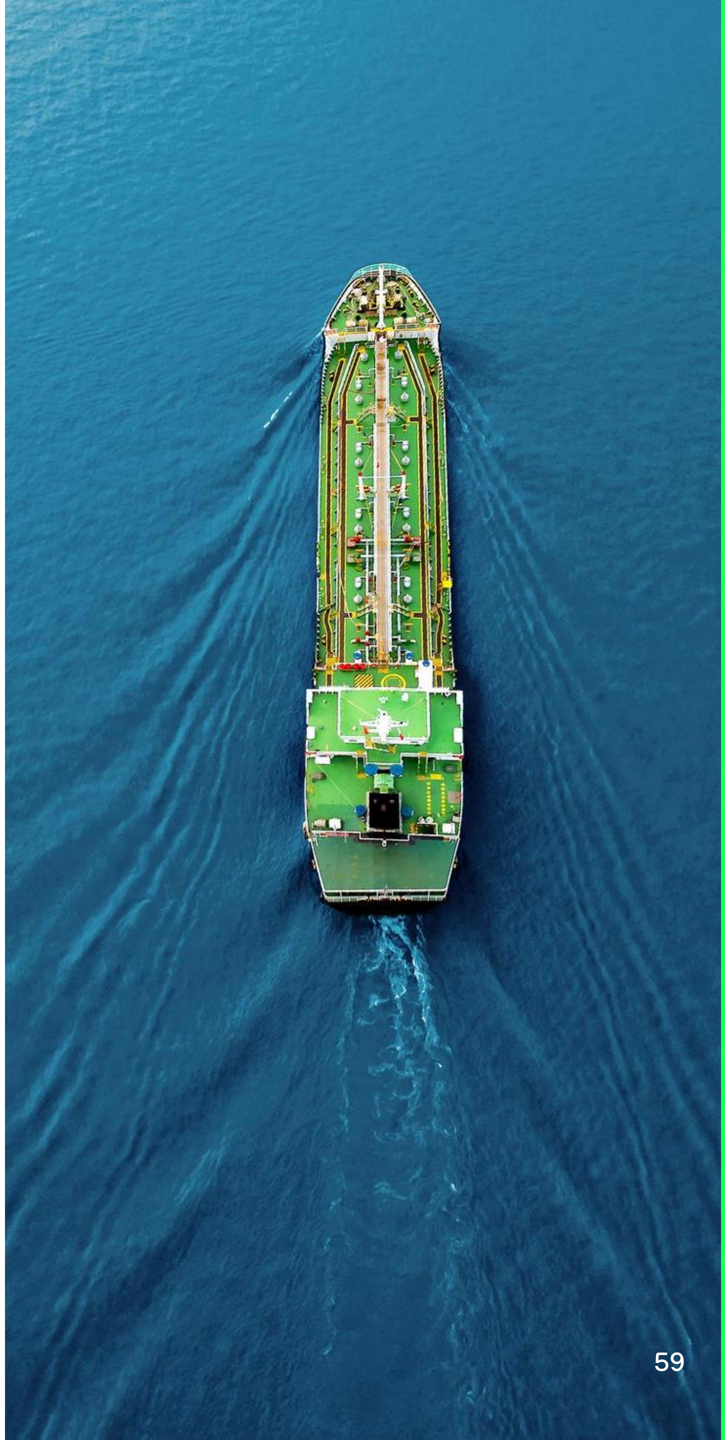
- Be the first mobility choice for retail customers, grow non-fuel business contribution and ramp-up EV capabilities
- Grow sales volumes in commercial road transport and expand aviation footprint

Renewable fuels and feedstocks

- Capture growth potential in renewable fuels and chemical feedstock markets

>50%	EUR ~600 mn	EUR 200–300 mn
2030 CFFO growth vs 2024	Retail	Renewable fuels and chemical feedstock

Clean CCS Operating Result contribution target in 2030



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Strategic cornerstones of Borouge International

Leading global integrated polyolefin company

A player of scale centered around value-add segments and high-growth markets

Platform through which OMV and XRG will pursue their **polyolefins growth strategy**

Innovation & Differentiation

Leader in technology, customer-centric innovation and **circular solutions** while **expanding in high-value segments** through premium and specialty products

Advantaged cost position

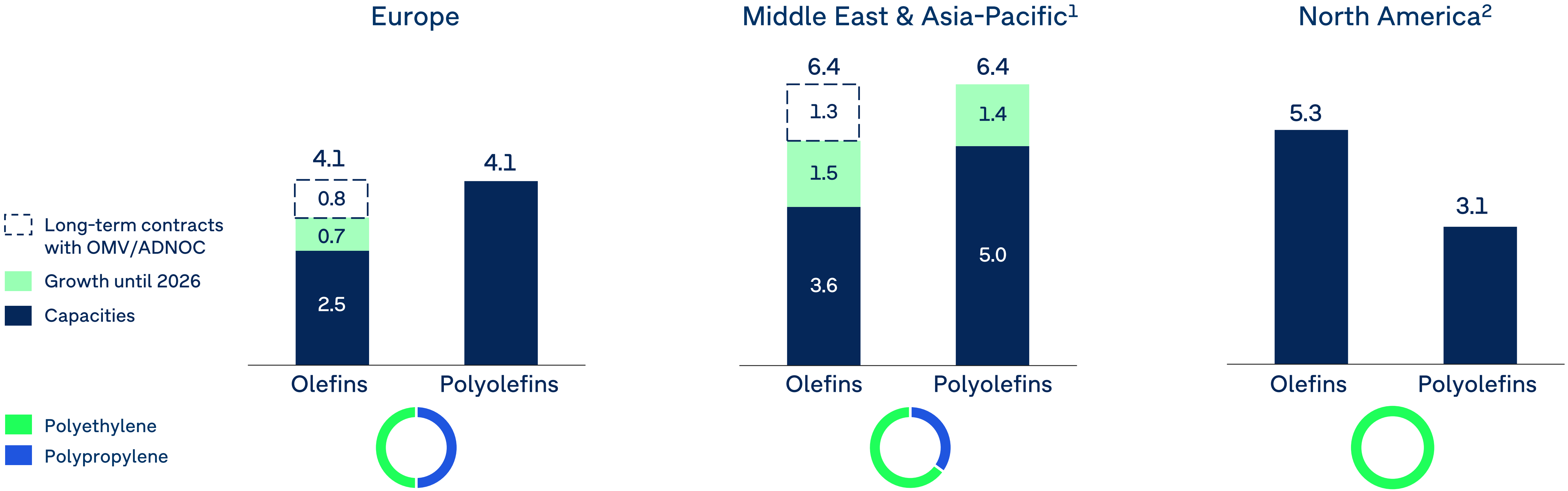
~70% of production in cost-advantaged feedstock regions, remainder benefitting from feedstock flexibility

Attractive shareholder returns

Well-positioned to generate **attractive shareholder returns** through the cycle

Borouge International: a global pure-play polyolefins leader, benefiting from a high level of integration

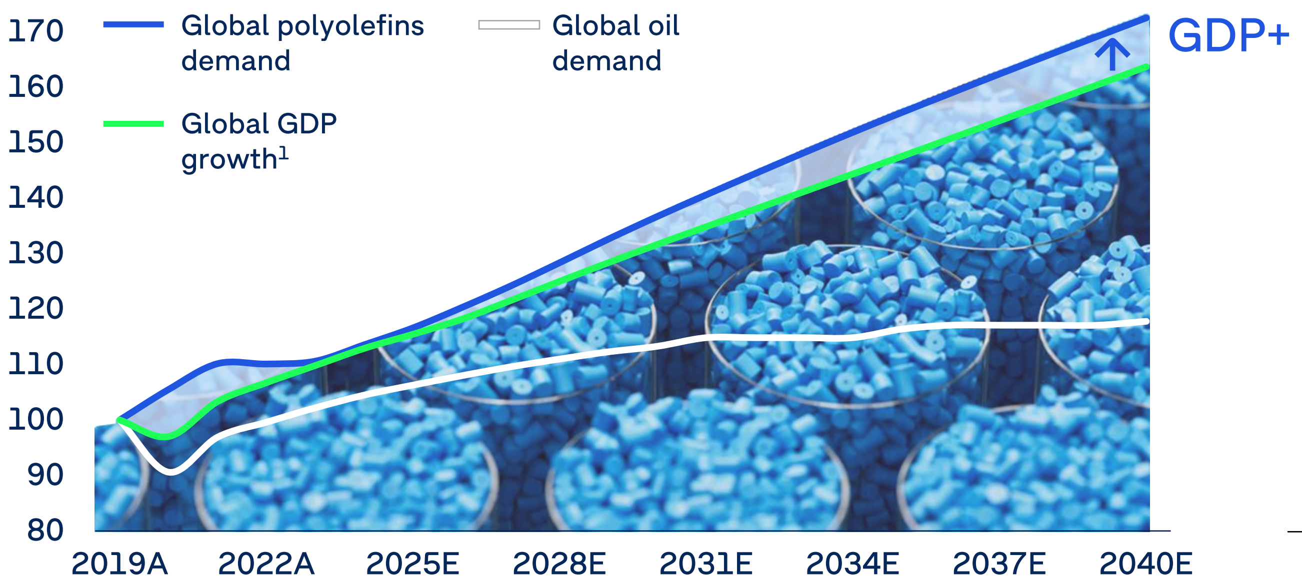
Production capacities per region
mn t pa



1 Borouge 4 capacities included
2 North America including Baystar capacities at 50% stake

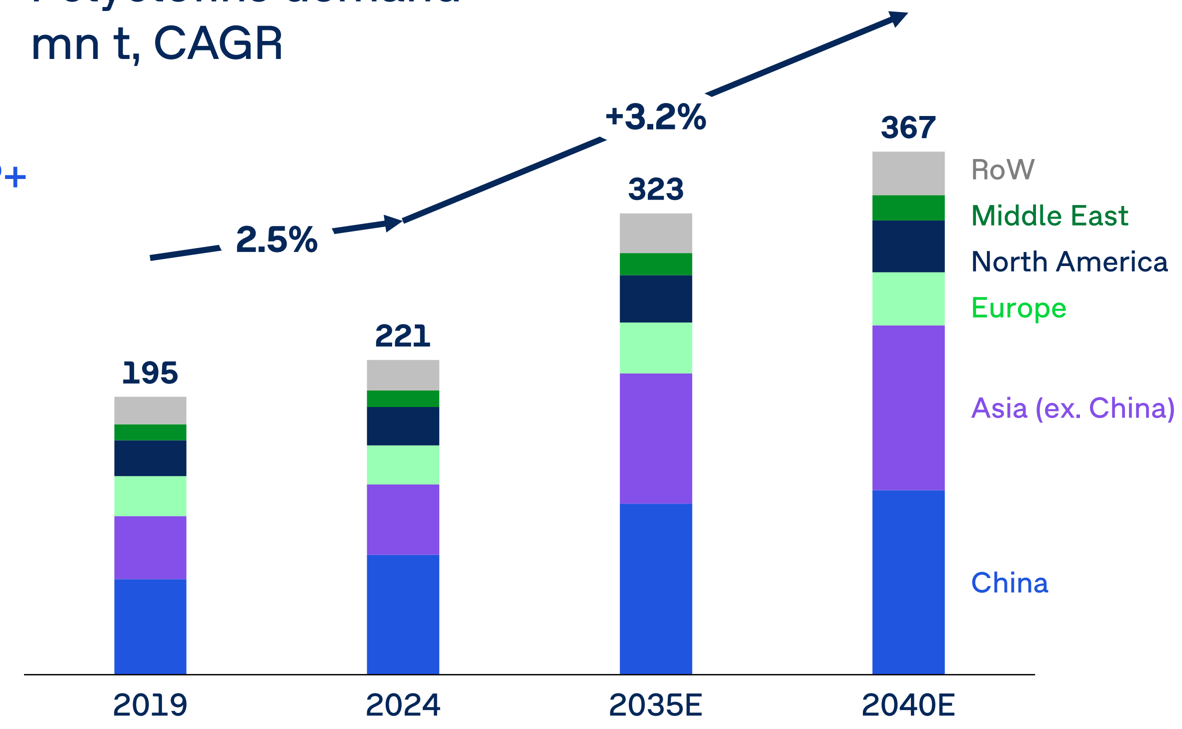
Long-term polyolefins demand growth expected to grow above global GDP

GDP, polyolefins and oil demand growth



1 GDP growth calculated based on CMA's forecasted PO demand growth and GDP elasticity

Polyolefins demand
mn t, CAGR



Source: Chemical Market Analytics by OPIS
Note: Polyolefins include polyethylene and polypropylene. Total demand includes virgin and recycled grades.

Portfolio benefits from leadership in high-value products and proprietary technologies

Key applications served

BOREALIS	Energy	Healthcare	Infra-structure	Mobility	Consumer Products	Polymer Solutions
بروج Borouge	Energy Solutions	Pipes & Fittings	Mono-material solutions	Water Solutions	Greenhouse Films	Sustainable Packaging
NOVA Chemicals®	Food Packaging	Rotomolded Products	Caps and Closures	Circular Solutions	Standard Rigid Packaging	Standard Flexible Packaging

Global leader: Energy (Borealis)
Regional leader: Healthcare, Infra-structure (Borealis); Energy Solutions, Pipes & Fittings (Borouge); Food Packaging, Rotomolded Products, Caps and Closures, Circular Solutions (NOVA Chemicals)
High-value products: Energy, Healthcare, Infra-structure, Mobility; Energy Solutions, Pipes & Fittings, Mono-material solutions, Water Solutions; Food Packaging, Rotomolded Products, Caps and Closures, Circular Solutions
Productivity products: Consumer Products, Polymer Solutions; Greenhouse Films, Sustainable Packaging; Standard Rigid Packaging, Standard Flexible Packaging

Global leader | Regional leader
High-value products | Productivity products

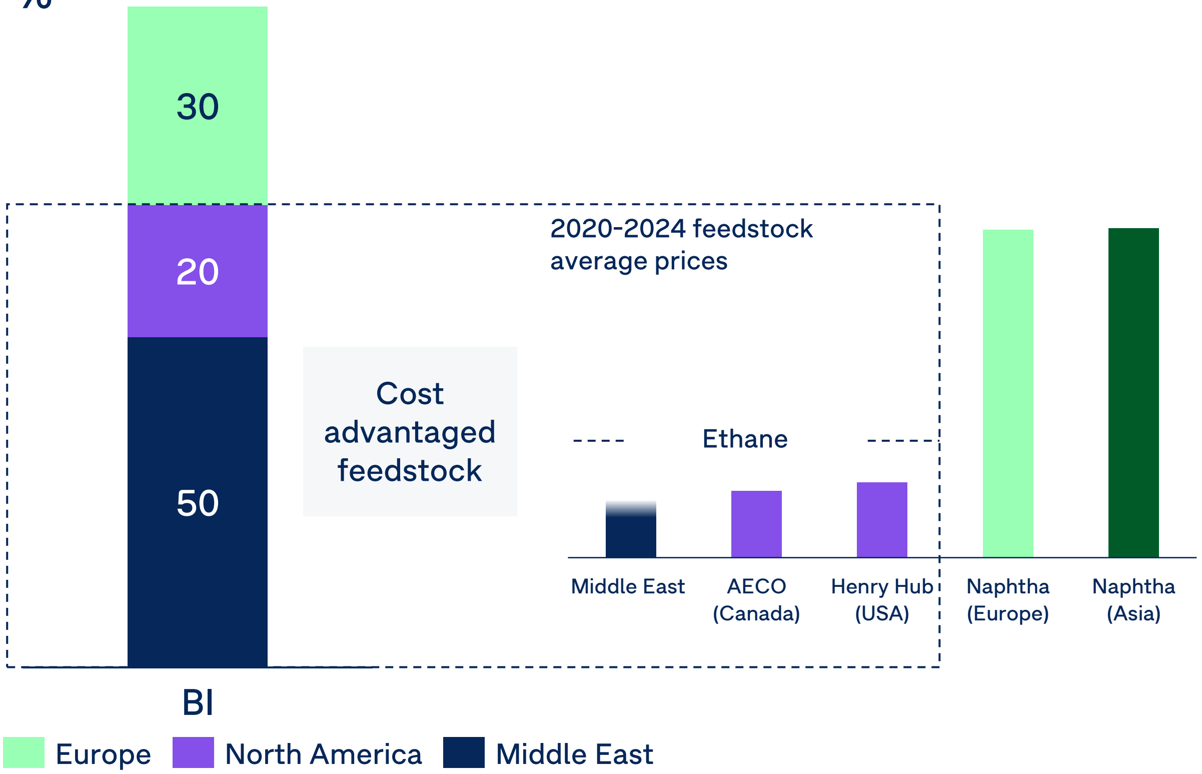
Increase in high-value products volumes






>70% of production with access to cost-advantaged feedstock

Borouge International polyolefin production capacities
%



1 Middle East post-deal includes Borouge 4 capacities

North America

- Low-cost feedstock access from strategic proximity to prolific shale basins and supporting infrastructure

Middle East

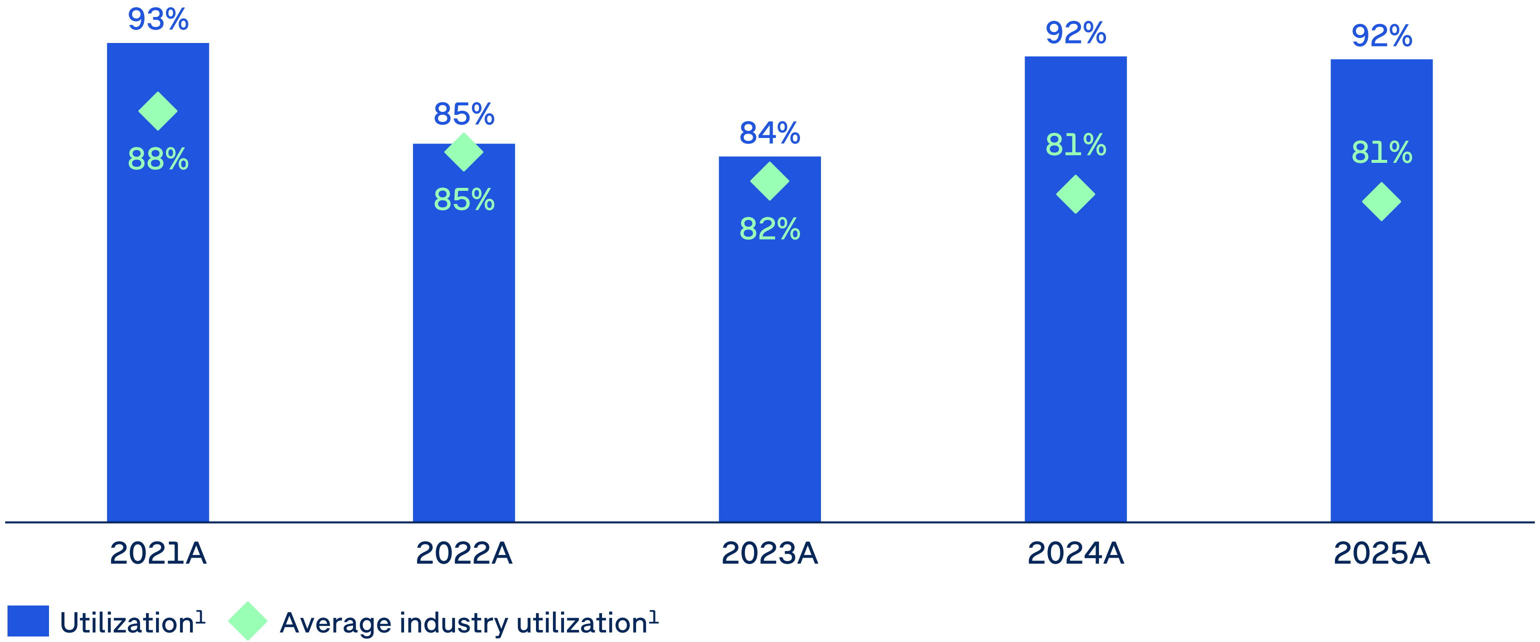
- Long-term secured ethane supply from ADNOC; assets will remain in the first quartile of global cost curve after price reset in 2027
- Half of propylene volumes supplied by ADNOC at lower than market benchmark and remaining volumes via Borouge assets

Europe

- High feedstock flexibility of Nordic crackers and access to light feedstock; ~45% linked to US light feedstock (e.g., ethane) pricing
- Ability to source and store low-cost ethane from US chartered vessels in Sweden and large cost-effective imports of butane and naphtha in caverns
- New PDH plant is based on best technology; ~ large storage allowing for US imports
- Deep integration with OMV refineries

Operational excellence underpins commercial profile

High uptime and asset availability drive excellent asset utilization



Source: Company information, FGE NexantECA

BOROUGE INTERNATIONAL

Getting the best out of the well-maintained and modern asset base

0.15
2025 TRIR[2]
Excellent HSE performance

+11%
L5Y volume growth
Consistent increase in annual production volumes

Industry-leading modern asset base (especially after Borouge 4)

Consistent improvement in energy efficiency

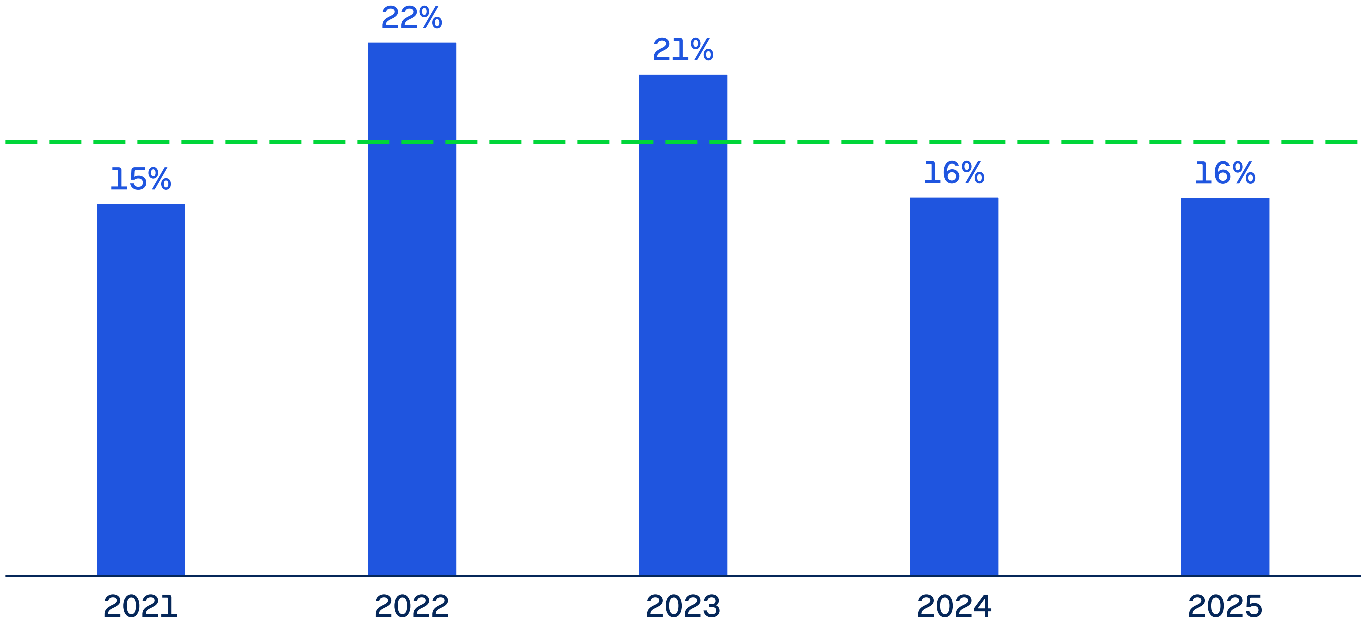
Focused approach to asset integrity and process safety management

Leveraging AI for autonomous operations and predictive maintenance

Note: Current and past statements about Borouge International relate to the individual companies Borouge, Borealis, and NOVA Chemicals and are pro forma figures.
1 Defined as polyolefin production volume (kt) to polyolefin production capacity (kt). Calculated as weighted average based on production volumes per company.
2 Total Reportable Injury Rate, defined as (Reported Injuries * 200,000) / Total Hours Worked

Superior product quality enables premium pricing

Weighted average PE selling price premiums vs. market benchmark[1], 2021–25



18%

Avg. premium over product benchmarks[1]

Source: Company information

BOROUGE INTERNATIONAL

Significant premium to benchmark pricing

Resilient margins from strong differentiated business

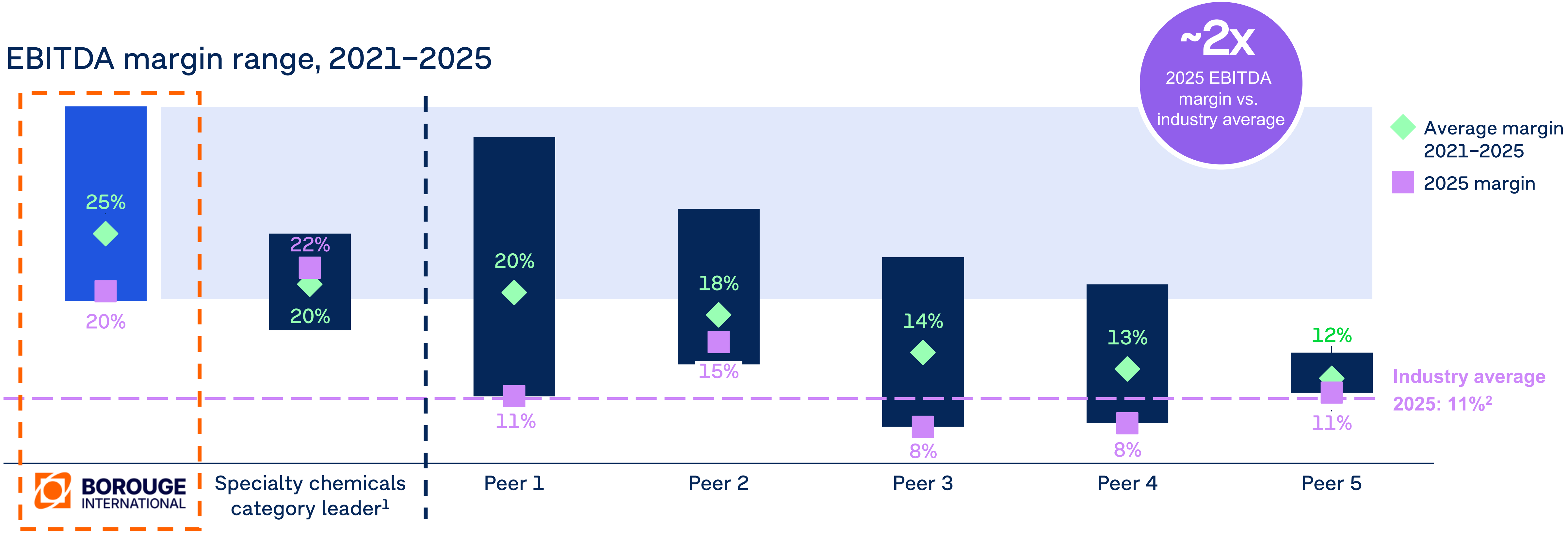
Premium sustained through the cycle

Supported by superior quality, deep supply chain integration, and customer intimacy

Note: Current and past statements about Borouge International relate to the individual companies Borouge, Borealis, and NOVA Chemicals and are pro forma figures.
1 Weighted average based on revenue. Premiums based on data as follows: Borouge vs. NEA HDPE Blow Molding; Borealis vs. WE HDPE Blow Molding; NOVA: AST1 average selling prices above North American LLDPE benchmark.

Outstanding historical earnings performance and resilience

EBITDA margin range, 2021–2025



Source: Company information, FactSet

Attractive margins in both up and down cycle – 2025 aggregated adjusted EBITDA margin twice as high as industry average margin

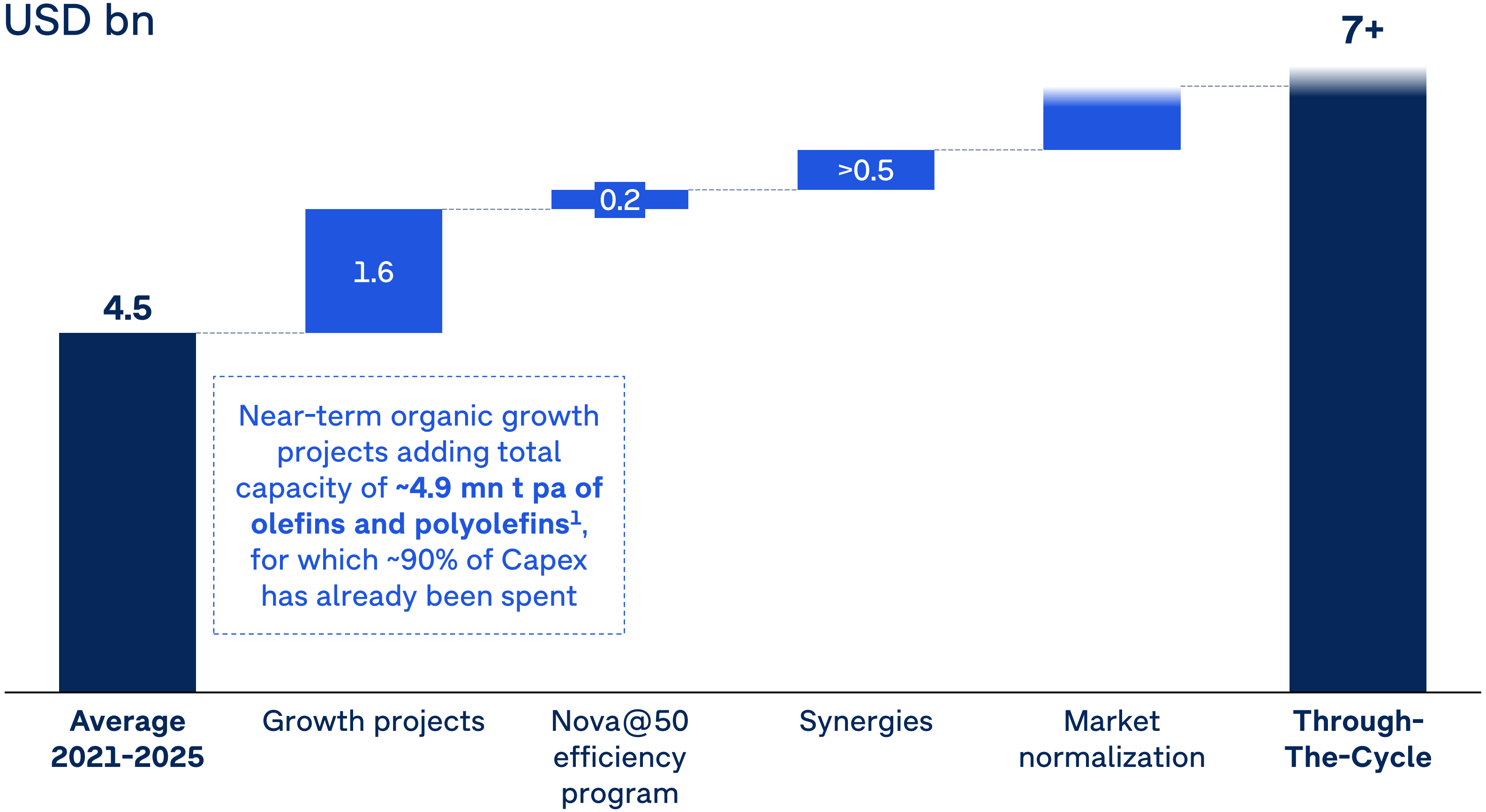
Note: Current and past statements about Borouge International relate to the individual companies Borouge, Borealis, and NOVA Chemicals and are pro forma figures. In the case of Borouge International, the EBITDA margin refers to the aggregated adjusted EBITDA margin.

1 Specialty chemicals category leader includes Sika, Ecolab, Sherwin Williams, and Givaudan

2 Average for global chemicals players: CP Chemicals, Sabic, Dow, LyondellBasell, BASF

EBITDA uplift from near-term growth projects and synergies

Borouge International EBITDA
USD bn



1 Including Borouge 4 and excluding equity accounted 50% stake in Baystar

Market development

Asia - positive impact expected from announced rationalization policies in China and South Korea, as well as delays in new capacity in China

Europe – ongoing capacity rationalization with a focus on polyethylene and non-integrated facilities

North America – local capacity additions expected in 2027-2030, with improved domestic market and exports

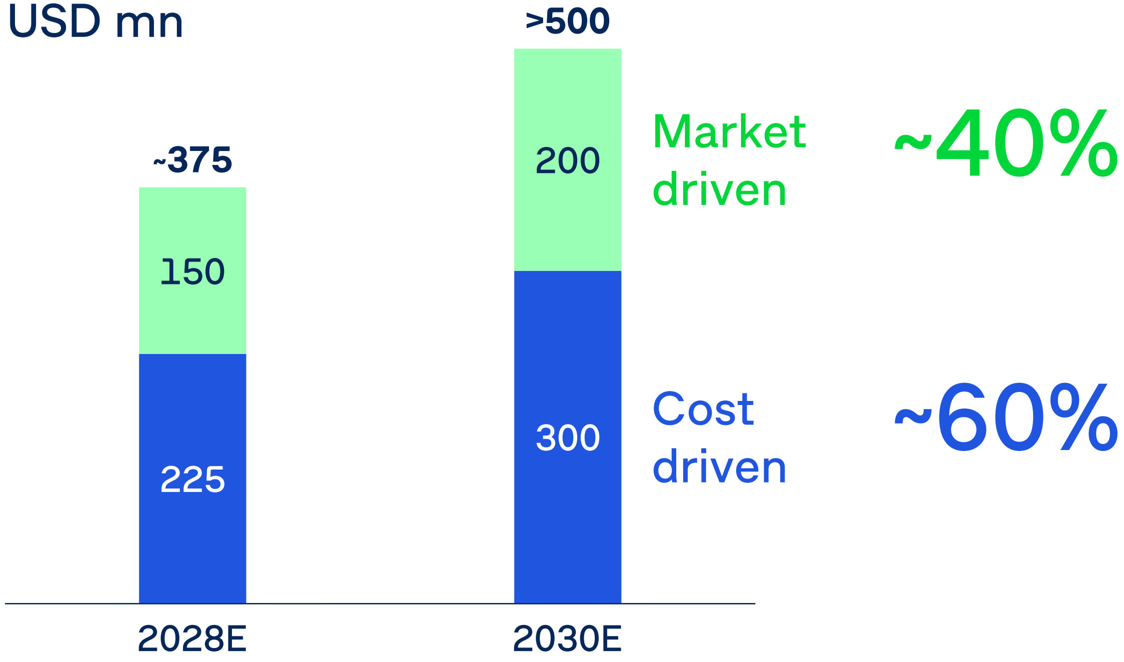
Borouge International – substantial near-term growth projects

	PDH Kallo	Baystar	AST 2	EU2 & PE 4/5	Borouge 4
		50% ownership, equity accounted			70% Adnoc, 30% OMV[1]
	• New world-scale propane dehydrogenation (PDH) plant • Capacity 740 kt p.a propylene	• New 625 ktpa PE plant (Bay 3) based on the latest Borstar® technology • Integrated 1 mtpa ethane-to-PE complex • Improved operational performance	• New 425 ktpa PE plant (AST2) based on Advanced Sclairtech® technology • Debottlenecked the cracker in Ontario by >50% to meet the demand of the AST2 plant • High utilization rate in 2025	• Debottlenecking projects • Increase PE production capacity by ~200 ktpa (PE4 & 5) – start-up planned in 2027 • Increase ethylene production capacity by 230 kt p.a. (EU2, pre-FID) – completion planned end-2028	• Ethane cracker (1.5 mt p.a.) and PE plants (1.4 mn p.a.) based on the latest Borstar® technology • **Gradual start-up**: end of 2025 to 2026 • **Borouge to act as sole marketing and distribution agent** before transfer; flexible timing of recontribution to BI
Project progress	95%	100%	100%	Early stage	>90%
TTC EBITDA	~EUR 200 mn	~USD 250 – 300 mn[2]	~USD 250 mn	~USD 200 mn	~USD 900 mn
Earnings Start	2026	2024	2025	2027-2028	2026

1 Borouge 4 to be recontributed to Borouge International at cost
2 50% view

Borouge International – substantial mid-term synergies

Anticipated annual run-rate EBITDA impact
USD mn



Key drivers of EBITDA synergies

- Improved market penetration
- Optimizing asset network
- Integrated and optimized sales and operations
- Technology spillovers

- Better procurement terms and supply chain
- Cost optimization
- Corporate-level benefits from global organization

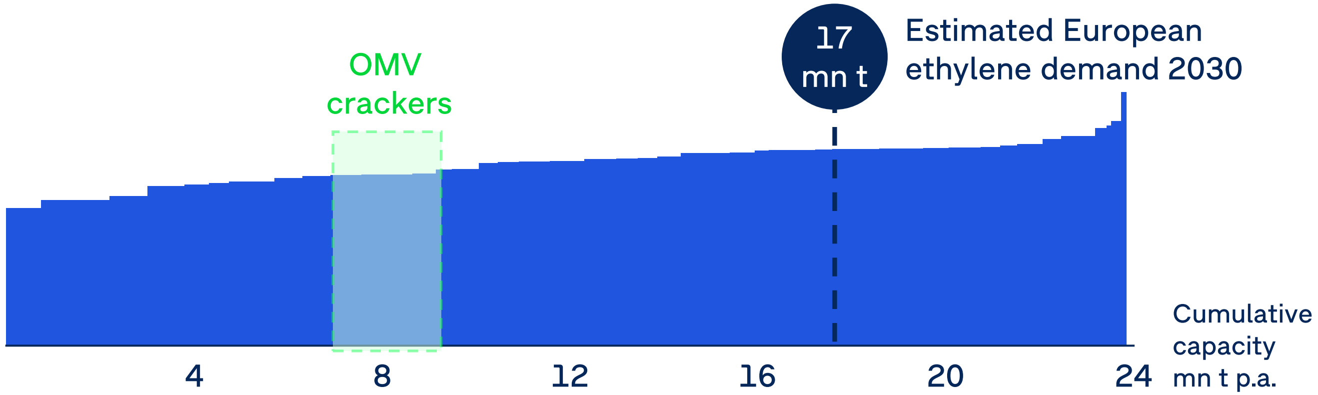
Implementation one-off costs of ~USD 150 mn

Source: OMV/ADNOC/Third-party consultant analysis

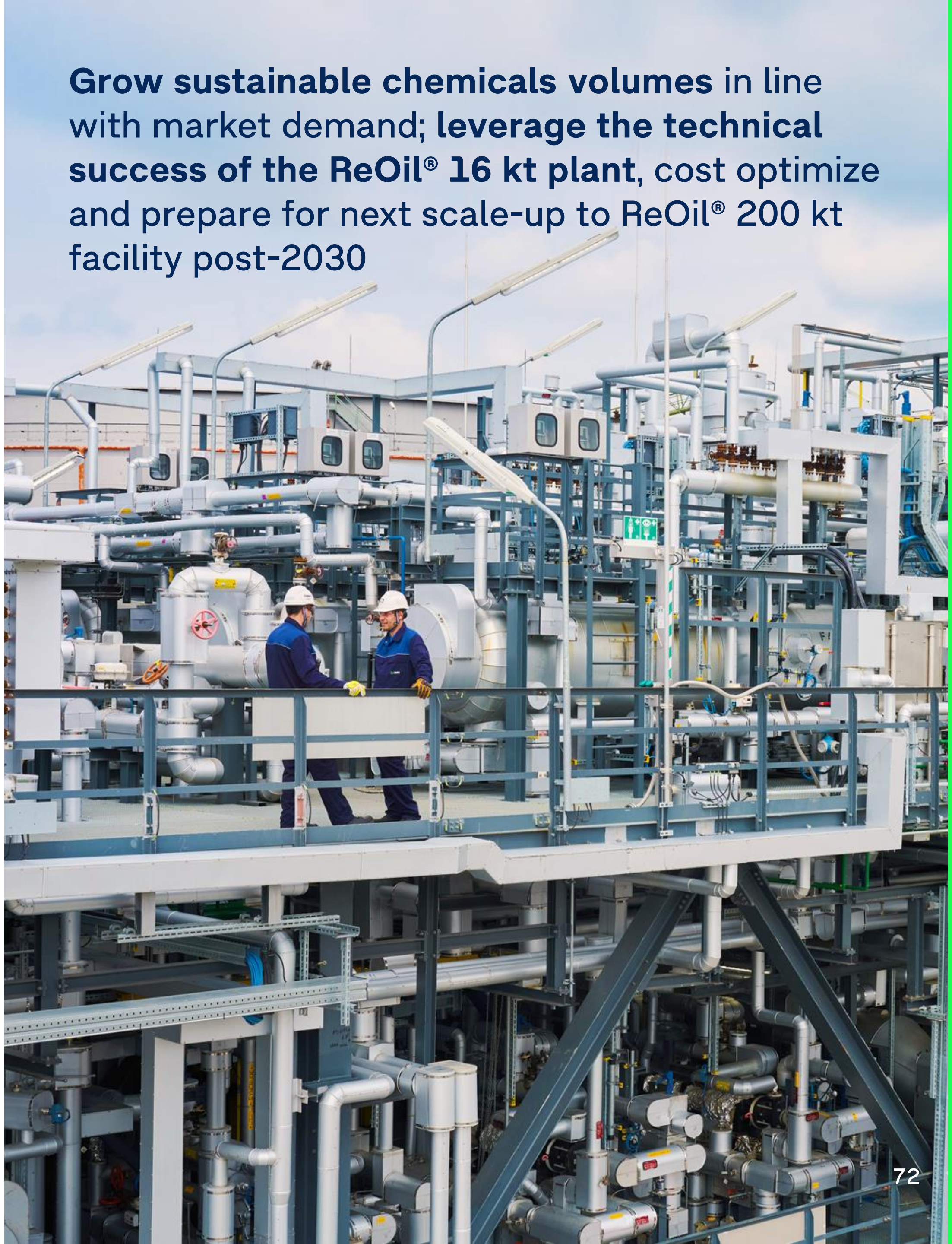
OMV chemicals to focus on cash delivery by increasing value chain integration

- OMV crackers are **competitive on the European cost curve** and benefit from **integration with refineries and Borouge International**
- **Long-term contracts with Borouge International** for ethylene and propylene supply from Burghausen and Schwechat
- **Increase utilization and feedstock flexibility** for the crackers
- Utilize refinery integration for **renewable feedstock**

Production cash cost vs. cumulative capacity



Grow sustainable chemicals volumes in line with market demand; **leverage the technical success of the ReOil® 16 kt plant**, cost optimize and prepare for next scale-up to ReOil® 200 kt facility post-2030



Source: OMV/Borealis analysis 2024

Chemicals – 2030 strategic ambitions

Borouge International

- Successful merger and integration
- Deliver organic growth projects, efficiencies and synergies

OMV base chemicals

- Maximize utilization of OMV crackers
- Further optimize end-to-end integration across value chain

Renewables

- Leverage technology and innovation for circular chemicals

USD >1 bn	>90%[1]	EUR ~200 mn
Borouge International floor dividend to OMV	Cracker utilization rate	OMV base chemicals contribution target to clean Operating Result in 2030

1 excluding turnarounds

Agenda

01 Group

02 Financial Framework

03 Energy

04 Fuels

05 Chemicals

06 Results, Governance, and Appendix

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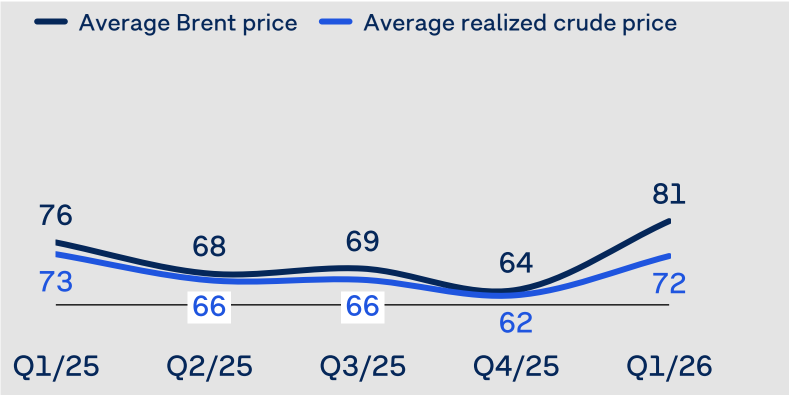
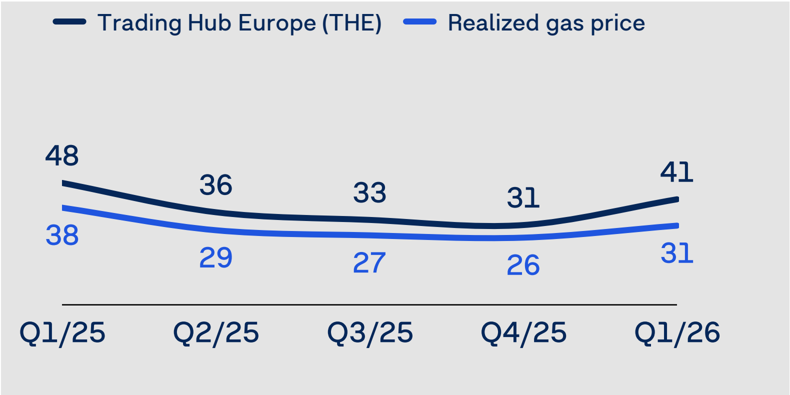
Latest financial results

Macro environment

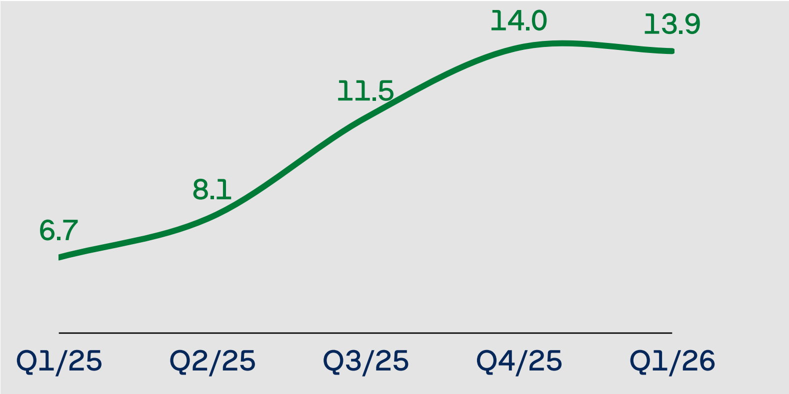
Oil prices
USD/bbl



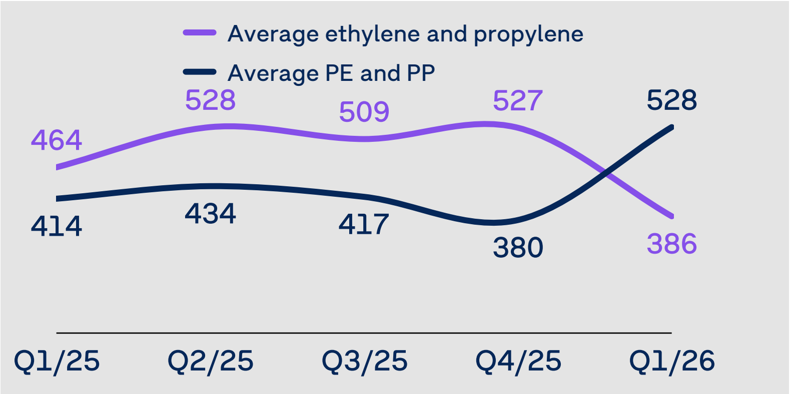
Gas prices
EUR/MWh



Refining indicator margin Europe
USD/bbl



Olefin and polyolefin indicator margins Europe
EUR/t

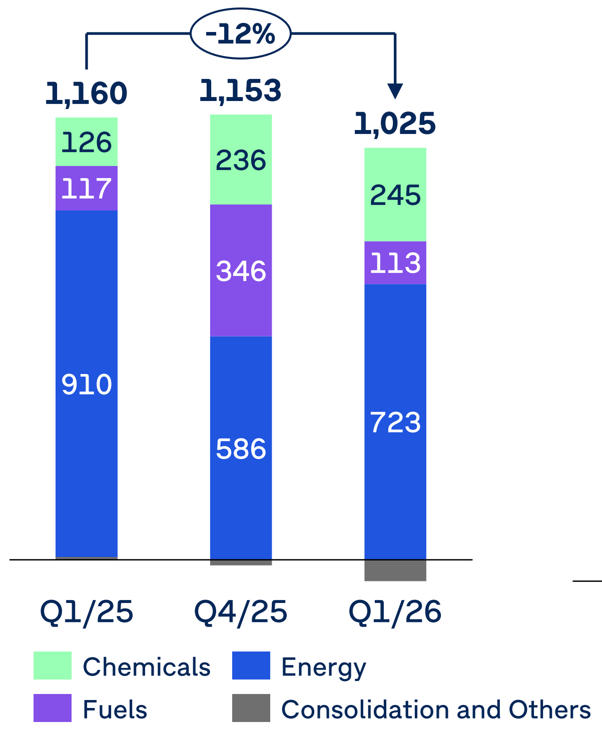


Q1 2026 vs. Q1 2025

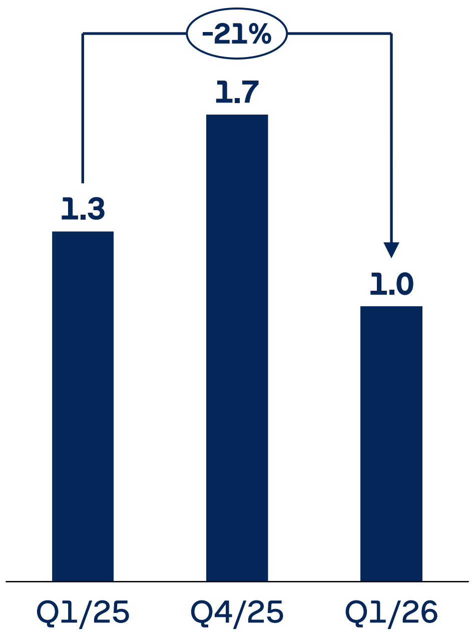
Brent oil	+7%
THE gas price	−13%
Europe refining indicator margin	+109%
Europe olefin indicator margin	−17%
Europe PE/PP indicator margin	+28%

Overview Q1 2026

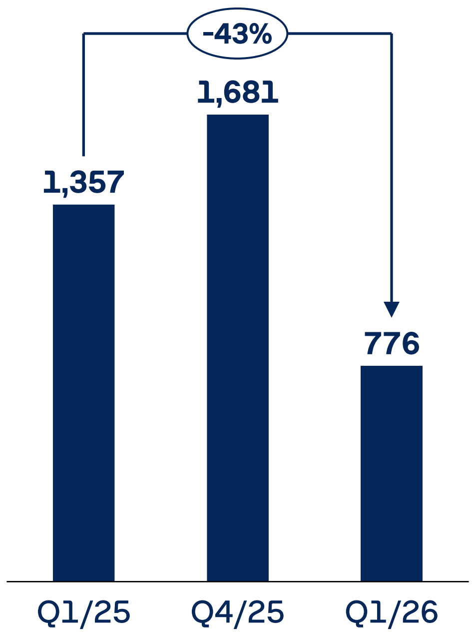
Clean CCS Operating Result EUR mn



Clean CCS EPS EUR



Cash flow from operating activities EUR mn



Operational performance
Q1 2026 vs. Q1 2025

Hydrocarbon production
−7%

Fuel sales volumes
+8%

Polyolefin sales volumes incl. JVs
−2%

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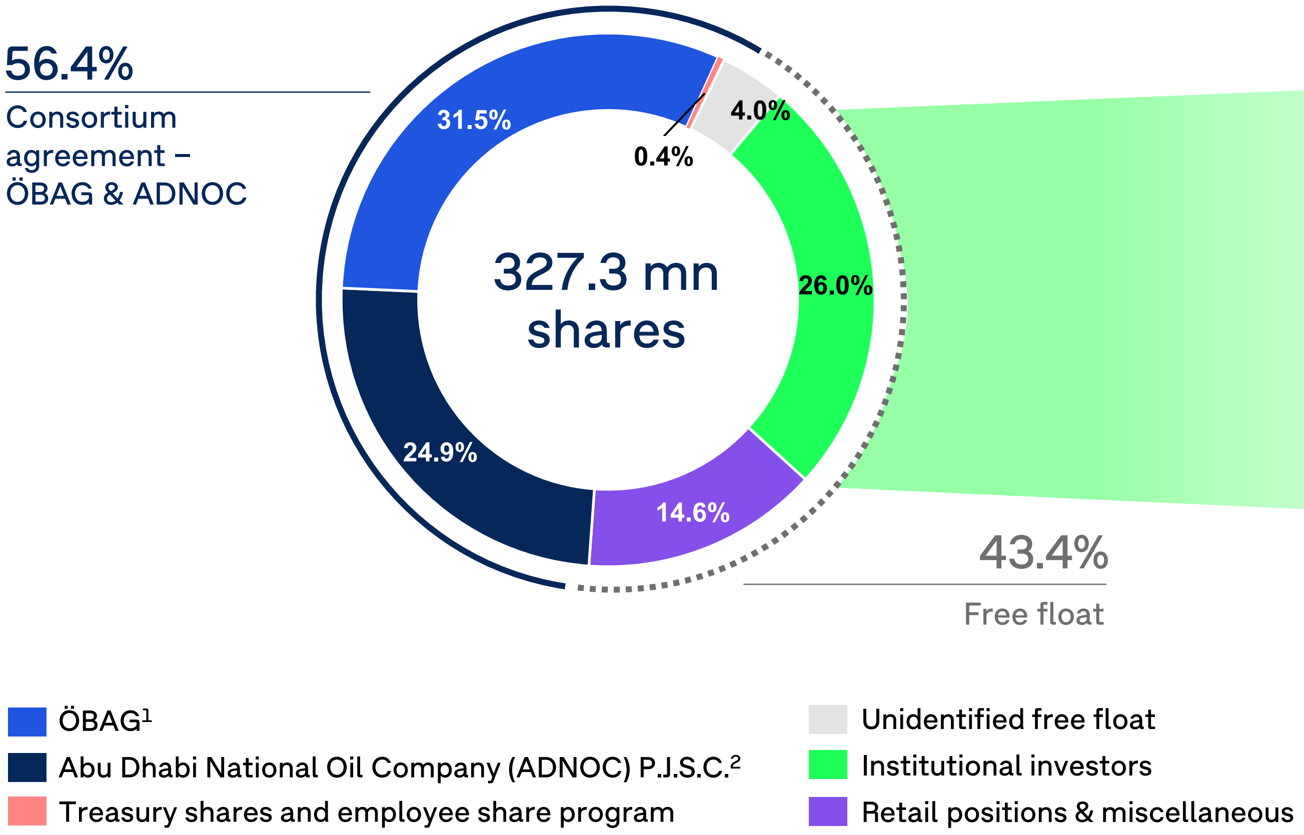
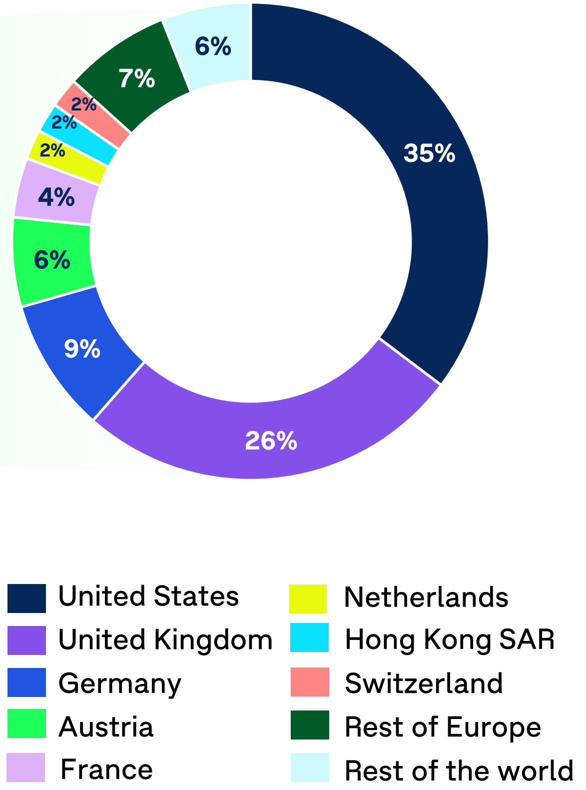
Governance

Diversified international shareholder base

Shareholder structure as of Q4/25

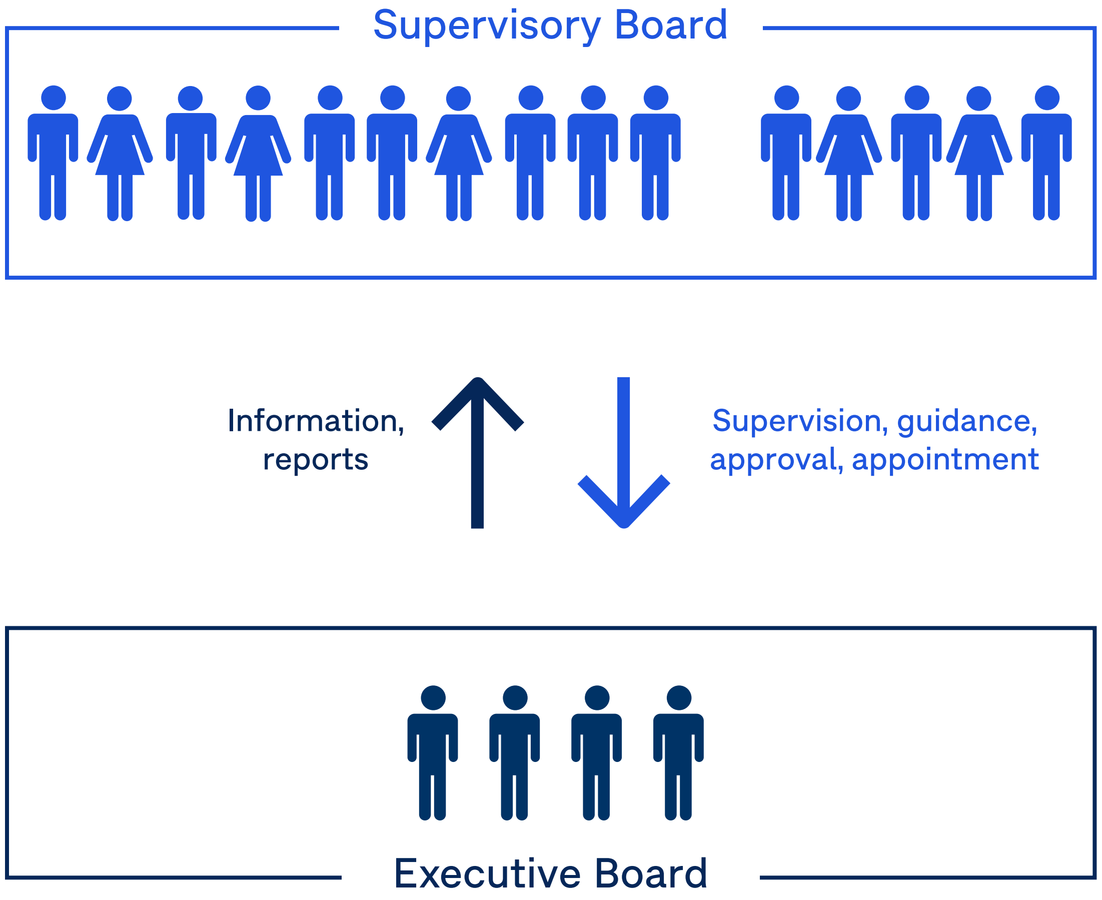


Geographical distribution of institutional investors as of Q4/25



1 ÖBAG (Österreichische Beteiligungs AG) is the Austrian state-owned holding company managing the investments of the Republic of Austria.
2 OMV has been informed by Abu Dhabi National Oil Company P.J.S.C. (ADNOC) of its intention to transfer its 24.9% shareholding in OMV AG (OMV) to XRG P.J.S.C (XRG), its wholly-owned international investment company. This transfer is subject to regulatory approvals.

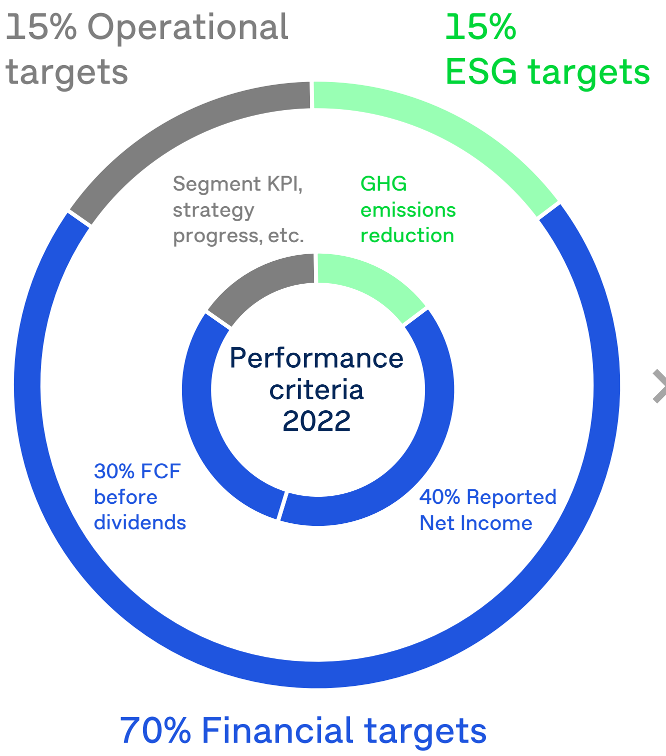
OMV has a two-tier Board structure



- Two boards with distinctive roles:
- Executive Board (EB) responsible for managing the company and representing it vis à vis third parties
- Supervisory Board responsible for monitoring and guiding the EB
- Supervisory Board elected by the General Assembly; EB appointed by the Supervisory Board
- 15 Supervisory Board members, thereof 10 shareholder and 5 employee representatives

Strong ESG weight in performance-related remuneration

Annual Bonus & Equity Deferral



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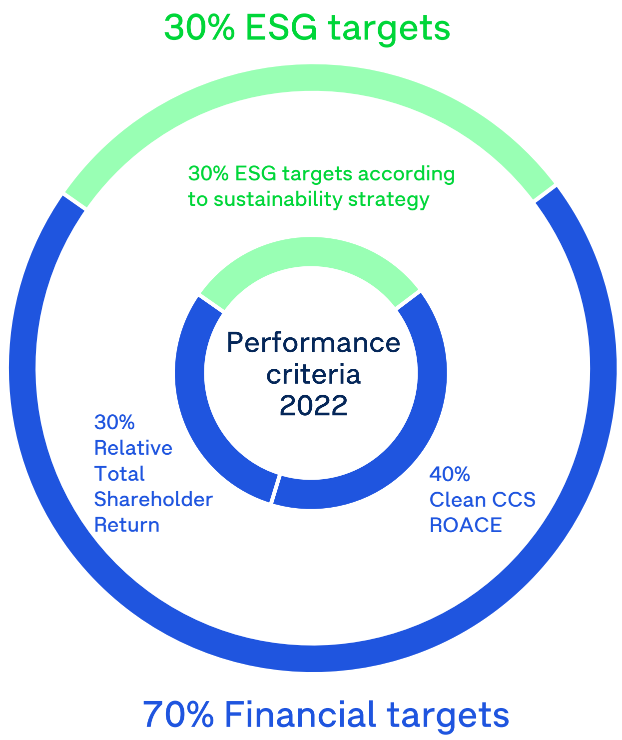
- Predefined criteria:
  - Fatalities
  - Total recordable incident rates
  - Process safety
  - etc.
- Compared to industry benchmarks
- Severe incidents: zero payout

Long-Term Incentive Plan (LTIP)



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- Predefined criteria:
  - Fatalities
  - Total recordable incident rates
  - Process safety
  - etc.
- Compared to industry benchmarks
- Severe incidents: zero payout

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Appendix

Strong ESG ratings for OMV among its peers

ESG ratings[1]	S&P Global Corporate Sustainability Assessment	MSCI ESG RATINGS	FTSE4Good	ecovadis	CDP	ISS ESG Corporate ESG Performance Prime	SUSTAINALYTICS
vs. Industry peers[2]	Top 9%	Top 7	Top 3%	Top 8%	Leading	Top 10%	Top 12%
SCORE	62	AA	4.3	73/100	B/B-/A[3]	B–	30.2

1 Publication dates of results: S&P CSA Jan 26, MSCI August 2025, FTSE4Good June 2025, EcoVadis April 2025, CDP March 2026, ISS–ESG Dec 25, Sustainalytics Nov 2025
2 Industry peers: S&P – Oil & Gas Upstream & Integrated; MSCI – Integrated Oil & Gas; ISS ESG – Integrated Oil & Gas; Sustainalytics – Integrated Oil & Gas; EcoVadis – all companies irrespective of sector; CDP – Oil & Gas sector (Average: Water C, Climate Change B, Supplier Engagement: one other peer company in A-list)
3 OMV: Water B, Climate Change B-, Supplier Engagement A

Pro forma OMV excl. Borealis/Borouge/Baystar for modelling purposes

No pro-forma equity contribution from the new Borouge International entity, which will include Borealis, Borouge, and NOVA, has been included for historical periods

In EUR mn	2024 reported	2024 pro forma	Δ	2025 reported	2025 Pro forma	Δ
Clean CCS Operating Result	5,141	4,714	−427	4,607	3,909	−689
Clean CCS net income attrib. to stockholders of the parent	2,090	1,718	−372	1,941	1,477	−464
Cash flow from operations excl. NWC	5,308	4,100	−1,208	4,494	3,614	−880
Cash flow from operations	5,456	4,341	−1,115	5,215	3,950	−1,265
Organic investing cash flow	3,470	2,778	−692	3,716	2,879	−837
Organic free cash flow	1,986	1,563	−423	1,499	1,072	−427
Organic CAPEX	3,710	2,865	−845	3,739	2,889	−849

Note: Pro forma information is presented for comparative purposes and reflects OMV excluding Borealis, Borouge (incl. Baystar) for all periods shown.

Sensitivities of OMV Group results in 2026

Annual impact excl. hedging EUR mn	Clean CCS Operating Result	Operating cash flow
Brent oil price (USD +1/bbl)	+50	+35
Realized gas price (EUR +1/MWh)	+45	+30
OMV refining indicator margin Europe (USD +1/bbl)	+110	+100
Ethylene/propylene indicator margin Europe (EUR +10/t)	+10	+5
EUR/USD (USD changes by +0.01)	+45	+35
CO_2 (EUR +5/t)	-5	-4

Note: Materially different Brent and FX levels (vs. current levels) would lead to different sensitivity results.
Operating cash flow excludes net working capital effects

Successful financing activities

Date of issue	Bond	Amount in EUR mn	Coupon in %	Maturity
December 2017	Eurobond (XS1734689620)	1,000	1.00 fixed	Dec. 14, 2026
September 2012	Eurobond (XS0834371469)	750	3.50 fixed	Sep. 27, 2027
April 2020	Eurobond (XS2154347707)	500	2.00 fixed	Apr. 9, 2028
December 2018	Eurobond (XS1917590959)	500	1.875 fixed	Dec. 4, 2028
June 2020	Eurobond (XS2189613982)	750	0.75 fixed	June 16, 2030
August 2024	Eurobond (XS2886118079)	500	3.25 fixed	Sep. 4, 2031
April 2020	Eurobond (XS2154348424)	750	2.375 fixed	April 9, 2032
November 2025	Eurobond (XS3225966699)	500	3.125 fixed	Nov. 10, 2033
July 2019	Eurobond (XS2022093517)	500	1.00 fixed	July 3, 2034
August 2024	Eurobond (XS2886118236)	500	3.75 fixed	Aug. 4, 2036
November 2025	Eurobond (XS3225966939)	500	3.875 fixed	Nov. 10, 2040
September 2020	Hybrid bond (XS2224439385)	750	2.50 fixed[1]	Perp-NC6
September 2020	Hybrid bond (XS2224439971)	500	2.875 fixed[1]	Perp-NC9
June 2025	Hybrid bond (XS3099092325)	750	4.3702 fixed[1]	Perp-NC5.5

1 Until first call date

Questions?

For further information

… have a look at our Online Report 2025

… or contact the OMV Investor Relations Team

investor.relations@omv.com

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