
# FNAC DARTY



# 9M 2025 REVENUE

OCTOBER 22, 2025

# 9M 2025 HIGHLIGHTS

**Revenue increase**

**+1.0%**

Like-for-like[1]

**Hardware**
**Back to growth**
During back-to-school

**Online sales**
**c. +8%**

**Services**
**Strong growth**

**Gross margin up**

**+50bps**

vs 9M 2024 comparable

**2025 guidance confirmed**

[1] Like-for-like: excludes exchange rate fluctuations. change in scope and opening and closing of directly owned stores. includes Unieuro and Ticketing deconsolidation.

# REVENUE & GROSS MARGIN INCREASE

| Q3 2025 Revenue | 9M 2025 Revenue | 9M 2025 gross margin |
|---|---|---|
| €2.5bn, +1.6% LFL[1] | €7.0bn, +1.0% LFL[1] | Up by +50bps |

**At the end of September 2025:**

- **By product category**:
  - **Editorial products:** strong gaming performance (Switch2 launch). Books: sluggish market.
  - **Services:** sound growth in most of geographies.
  - **Consumer electronics:** slight decrease despite a strong recovery in hardware sales in the third quarter.
  - **Domestic Appliances:** growth driven by small domestic appliances (new product innovation), slight decrease for large domestic appliances despite good momentum in air conditioning and refrigeration products.
- **By channel:**
  - 20% online sales
  - Of which c.50% C&C

[1] Like-for-like: excludes exchange rate fluctuations. change in scope and opening and closing of directly owned stores. includes Unieuro and Ticketing deconsolidation.

# SOLID SALES PERFORMANCE ACROSS EUROPE

| In €m | 9M 2025 | As a % of total Group revenue | % reported Change | % LFL[1] Change |
|---|---|---|---|---|
| **France** | **4,119** | **59%** | **+0.4%** | **+0.9%** |
| **Rest of Europe** | **2,848** | **41%** | **(0.1)%** | **+1.0%** |
| *Italy* | *1,737* | *25%* | *(0.6)%* | *(0.6)%* |
| *Belgium* | *439* | *6%* | *+0.9%* | *+0.9%* |
| *Portugal* | *344* | *5%* | *+5.1%* | *+6.5%* |
| *Spain* | *192* | *3%* | *(7.7)%* | *+6.2%* |
| *Switzerland* | *134* | *2%* | *+2.3%* | *+3.6%* |
| **TOTAL GROUP** | **6,968** | **100%** | **+0.2%** | **+1.0%** |

**At the end of September:**

- **France**: up thanks to a dynamic Q3. Still outperforming the market[2]
- **Rest of Europe**: increase with contrasted evolutions

**Italy**: web and services performing well. Appliances and TV impacted by high comp base in Q3 2024

**Belgium**: strong growth in Q3

**Portugal**: strong performance across the 2 brands

**Spain**: strong performance across all categories. Scope effect linked to temporary store closure

**Switzerland**: strong growth with sound performance on web and in services

[1] Like-for-like: excludes exchange rate fluctuations. change in scope and opening and closing of directly owned stores. Includes Unieuro and Ticketing deconsolidation.
[2] Banque de France, 21 October 2025

# DARTY BRAND LAUNCH IN PORTUGAL

# REPAIR & BEYOND

## 8TH AFTER SALES SERVICES BAROMETER


## NEW LOGISTIC & AFTER SALES PLATFORM


- Chilly Mazarin
- 6,500 sq.m
- After sales services
- Bulky products delivery

# BEYOND DIGITIZED OMNICHANNEL

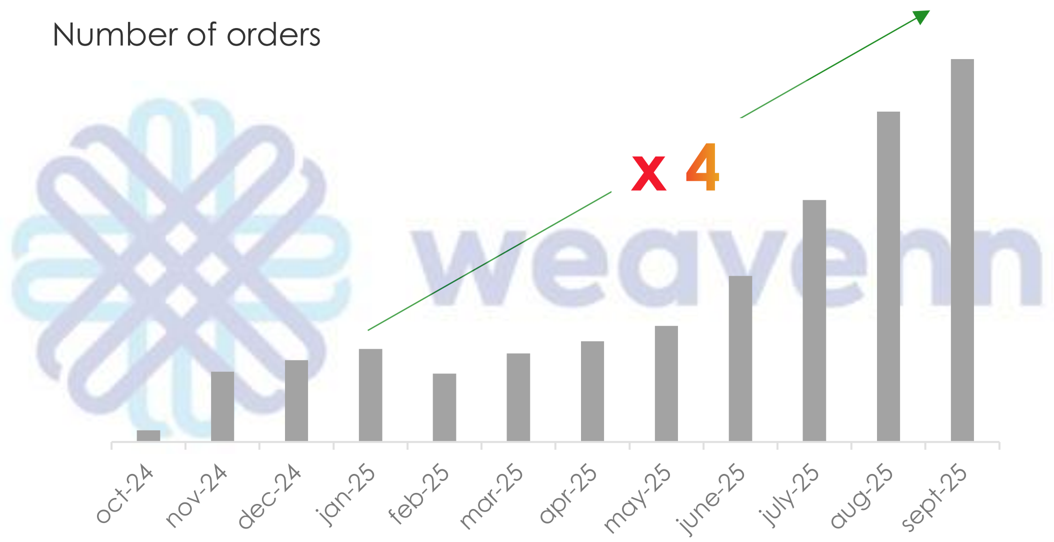
## New standards in customer experience

### DARTY ROUEN


### FNAC DIJON



### BODY & TECH CORNERS


> 130 vendors (vs. 5 in Q3 2024)

> 1,500 orders/day (vs. <100 in Q3 2024)

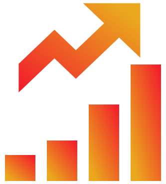
New: C&C delivery in Fnac stores

RETAILINK BY FNAC DARTY

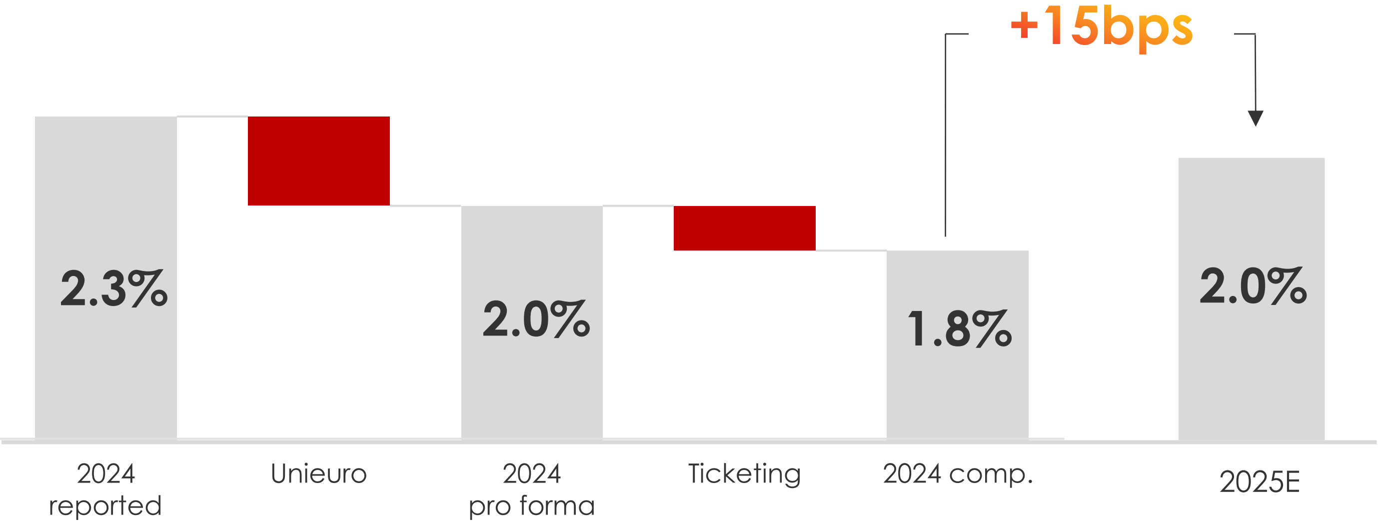
The first non-food retail media network **certified eRetail Data Trust by the CESP**[1]

[1] Centre d'Etude des Supports de Publicité.

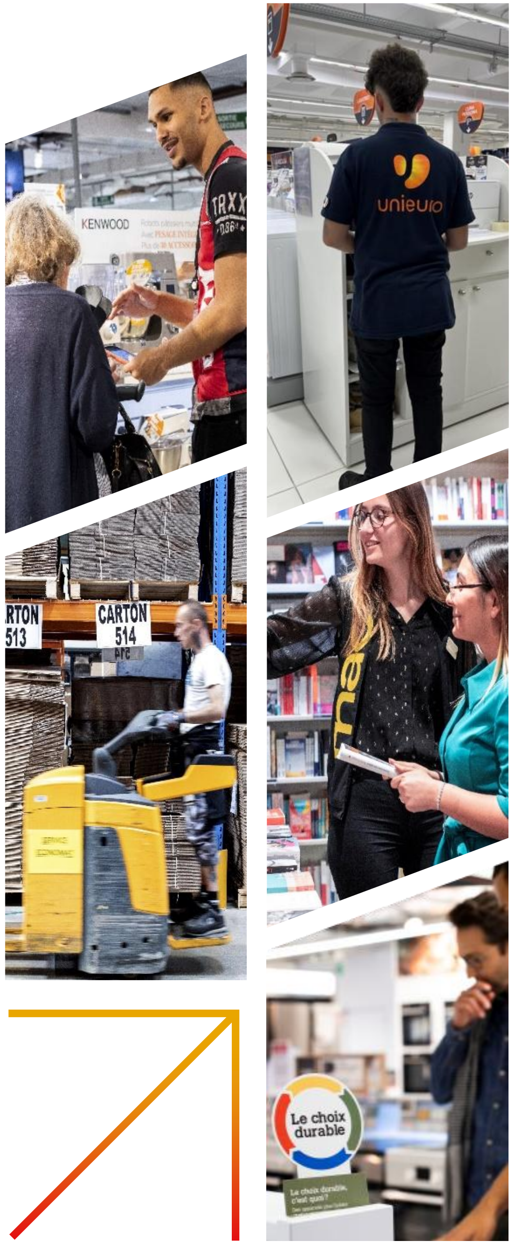
# 2025 OUTLOOK CONFIRMED



Current operating margin[1]




[1] Including Unieuro and excluding ticketing activities.




# Q&A

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KENWOOD
TRXX


CARTON
513
CARTON
514


Le choix
durable


unieuro

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