Rompetrol Rafinare S.A. (symbols, Bucharest Stock Exchange: RRC, Reuters: ROMP.BX, Bloomberg: RRC RO) has released today its second quarter and first semester 2025 financial and operational unaudited results. The figures include unaudited consolidated financial statements for this period prepared by the company in accordance with International Financial Reporting Standards („IFRS").

Consolidated financial statements of Rompetrol Rafinare include the results of the parent company Rompetrol Rafinare S.A and its subsidiaries Rompetrol Downstream S.R.L, Rompetrol Gas S.R.L, Rompetrol Quality Control S.R.L, Rom Oil SA, Rompetrol Logistics S.R.L and Rompetrol Petrochemicals S.R.L.

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HIGHLIGHTS – CONSOLIDATED

		Q2 2025	Q2 2024	%	H1 2025	H1 2024	%
Financial							
Gross Revenues	USD	1,476,939,627	1,019,794,632	45%	2,799,494,022	2,113,346,130	32%
Net Revenues	USD	1,072,200,107	746,226,077	44%	2,067,728,166	1,583,480,138	31%
EBITDA	USD	54,764,702	11,716,155	367%	77,586,067	44,922,722	73%
EBITDA margin	%	5.1%	1.6%		3.8%	2.8%	
EBIT	USD	32,607,959	(30,983,615)	N/A	24,753,831	(22,933,701)	N/A
Net profit / (loss)	USD	(15,862,822)	(51,351,162)	-69%	(53,189,115)	(75,171,660)	-29%
Net Profit / (loss) margin	%	-1.5%	-6.9%		-2.6%	-4.7%	

Rompetrol Rafinare S.A. consolidated gross revenues reached approximately USD 1.5 billion in Q2 2025, respectively USD 2.8 billion for the first 6 months of 2025, higher by 45% and by 32% as against same periods last year. The 2024 reference periods were influenced by the scheduled two-month general turnaround of Petromidia refinery.

The results have been supported by an increase in the volume of processed raw materials and of the petroleum products sold, as well as by the increase in net refining margin (26.5 USD/to in H1 2025 as against 19.7 USD/to in H1 2024).

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ECONOMIC ENVIRONMENT*

		Q2 2025	Q2 2024	%	H1 2025	H1 2024	%
Brent Dated	USD/bbl	67.9	85.0	-20%	71.9	84.1	-15%
CPC Blend CIF	USD/bbl	64.5	82.0	-21%	68.3	80.4	-15%
Brent-CPC Differential	USD/bbl	3.3	2.9	14%	3.6	3.7	-2%
Premium Unleaded 10 ppm FOB Med	USD/ton	683	864	-21%	700	846	-17%
Diesel ULSD 10 ppm FOB Med	USD/ton	633	769	-18%	663	793	-16%
RON/USD Average exchange rate		4.44	4.62	-4%	4.58	4.60	0%
RON/USD Closing exchange rate		4.33	4.65	-7%	4.33	4.65	-7%
RON/EURO Average exchange rate		5.03	4.98	1%	5.00	4.97	1%
RON/EURO Closing exchange rate		5.08	4.98	2%	5.08	4.98	2%
USD/EURO Closing rate		1.17	1.07	9%	1.17	1.07	9%
Inflation in Romania		0.97%	0.21%	364%	3.08%	2.57%	20%

Source: Platts, INSSE (Inflation in Romania is calculated based on CPI - i.e. Consumer Price Index)

In Q2 and H1 2025 the average price of **Dated Brent** crude oil was 67.9 $/bbl. and 71.9 $/bbl., respectively - reflecting a decline of 17.1$/bbl. (-20%) for Q2 2025 and of 12.2 $/bbl. (-15%) for the first 6 months of 2025 compared to the same periods in 2024.

Similarly, the average **CPC** crude quotation for Q2 2025 was 64.5 $/bbl. and 68.3 $/bbl. for H1 2025, representing a drop of 17.5 $/bbl. (-21%), respectively 12.1 $/bbl. (-15%), year-on-year.

In January, Dated Brent price increased from 76 to 83$/bbl. This increase was driven by tighter sanctions on Russian and Iranian oil which raised concerns about potential supply disruptions. Also, a North American cold snap boosted demand and refinery activity pushing refinery runs to their highest levels in five years.

However, by the end of February, most of these gains were reversed, with Brent falling to $73 per barrel. The decline was influenced by supply disruptions due to cold weather in North America and outages in Nigeria and Libya. Additionally, new US tariffs affected the global economic sentiment, while crude inventories dropped significantly, especially in China.

In March, Dated Brent prices continued to fall nearing 70$/bbl., a three-year low. This drop was driven by worsening macroeconomic conditions and rising trade tensions that impacted demand expectations. At the same time, OPEC+ signaled intentions to phase out voluntary production cuts starting in April, rising expectations of increased supply. Despite rising OPEC+'s output, refinery runs dropped, and stocks recovered.

In Q2 2025, Brent continued to decline, reaching a four-year low of around 60 USD/bbl in early May. The fall was caused by a combination of higher OPEC+ output, renewed global trade uncertainty, and weaker demand projections.
From mid-June, the market experienced a partial recovery with Brent prices rising about 33% to approximately 80$/bbl. due to amplified Middle East tensions, tighter U.S. crude inventories, stronger U.S. demand, and optimism in U.S. - China trade talks.
Despite this recovery, the extensive outlook remains cautious. Forecasts from Morgan Stanley and Barclays point to a potential return to oversupply, tempered demand and Brent prices stabilizing around 60$/bbl. by early next year.

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European refinery margins decreased in Q2 2025 by 3.4 $/MT (-4.6%), averaging at 69.8 $/MT and for H1 2025 decreased by 23.2 $/MT (-25.9%) compared to the same period in 2024, and settled at an average of 66.6 $/MT.

European refinery margins displayed a volatile pattern throughout the first half of 2025.
Early in the year, margins rose steadily until mid-February, supported by strong cracks for diesel and gasoline, seasonal winter demand, and reduced product availability due to maintenance shutdowns. A second upward phase occurred from early April to mid-May, driven by solid gasoline crack spreads and lower crude oil prices.
Mid-Q2, margins came under pressure due to increased refinery activity, weaker diesel demand, and growing competition from product exports out of Asia and the Middle East.
By late June, margins began to recover, influenced by stronger demand for gasoline and jet fuel, combined with tighter product supply across the region.

Gasoline cracks remained one of the most resilient elements throughout H1 2025. They started Q1 relatively stable to slightly bullish, supported by low stock levels and preparation for seasonal export demand. Toward the end of the quarter, gasoline cracks fluctuated but remained moderately strong, helped by robust transatlantic exports to the US and Canada, and improving European domestic consumption. In Q2, cracks remained firm in the early weeks driven by seasonal factors and export demand. However, mid-quarter saw a decline due to stock builds and reduced arbitrage opportunities. By June cracks stabilized again, supported by increased consumption during the peak driving season.

Diesel cracks were strong early in Q1 due to low inventories and stable winter heating demand across Europe. However, cracks softened slightly toward the end of the quarter as the economic outlook worsened, with several major institutions downgrading GDP growth forecasts. Diesel demand remained stable short-term, but supply pressure expanded as Saudi Arabia and Russia ramped up exports after earlier disruptions. The combination of macroeconomic fears and recovering supply capped diesel crack strength by March. Diesel cracks remained weak throughout Q2, pressured by high imports, soft industrial demand, and macroeconomic uncertainty. Minor support emerged in late June from improved inland demand and tighter supply, but levels stayed low.

Jet fuel cracks held firm during the first half of Q1, underpinned by low inventories, relatively stable European travel demand, and limited imports from Asia. In the latter part of the quarter, jet cracks became more mixed, although European jet demand increased (adding around 120K b/d in April projections), growing jet fuel surpluses in the Middle East and India put pressure on global flows. Nevertheless, seasonal demand gains helped keep the European jet positive, in dollar per barrel terms, through the end of March. Jet cracks were stable in early Q2, supported by seasonal travel. They softened mid-quarter amid global oversupply - especially from the Middle East and India - but recovered slightly by end of June as summer air traffic increased and supply segment eased.

Looking ahead, European refining margins will face continued pressure in H2 2025 from weak diesel, global oversupply, and economic uncertainty. While gasoline and jet demand may offer seasonal support, margins are likely to remain volatile, with limited positive aspect unless supply tightens, or macroeconomic conditions improve.

Against this background, internally, the RON/EUR exchange rate witnessed fluctuations on the higher pillar in Q1 2025, showing an average level of 4.9764. At the beginning of May 2025, the RON/EUR exchange rate jumped over the threshold of 5 RON/EUR and averaged in Q2 2025 at the level of 5.0317, reflecting the very high uncertainties triggered worldwide and on the international financial market.

The RON/USD rate in Q1 2025 was marked by increased volatility and pronounced fluctuations. The average rate was 4.7264 for Q1 2025, with notable peaks occurring in the first half of January (4.8734 on January 13, 2025). For Q2 2025, the RON/USD exchange rate saw a reversed trend and strengthened significantly with an average of 4.4385 and 6 months minimum of 4.3254 reached at the end of the quarter on June 26, 2025.

**The information is based on analysis provided by JBC Energy GmbH, OPEC and National Bank of Romania*

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REFINING SEGMENT

		Q2 2025	Q2 2024	%	H1 2025	H1 2024	%
Financial							
Gross Revenues	USD	1,276,670,817	796,139,020	60%	2,381,507,455	1,733,855,652	37%
Net Revenues	USD	929,875,323	590,655,967	57%	1,775,290,301	1,312,442,302	35%
EBITDA	USD	44,083,924	5,380,203	719%	61,239,054	33,890,150	81%
EBITDA margin	%	4.7%	0.9%		3.4%	2.6%	
EBIT	USD	31,383,795	(22,340,275)	N/A	24,325,058	(2,600,434)	N/A
Net profit / (loss)	USD	(14,369,987)	(42,560,099)	-66%	(48,907,832)	(47,326,517)	3%
Net profit / (loss) margin	%	-1.5%	-7.2%		-2.8%	-3.6%	
Gross cash refinery margin/ton (Petromidia)	USD/ton	74.0	72.3	2%	69.4	79.4	-13%
Gross cash refinery margin/bbl (Petromidia)	USD/bbl	10.2	10.0	2%	9.6	10.9	-13%
Net cash refinery margin/ton (Petromidia)	USD/ton	33.9	3.2	956%	26.5	19.7	34%
Net cash refinery margin/bbl (Petromidia)	USD/bbl	4.7	0.4	956%	3.6	2.7	34%
Operational							
Feedstock processed in Petromidia refinery	thousand tons	1,451	788	84%	2,789	1,731	61%
Feedstock processed in Vega refinery	thousand tons	105	56	87%	181	117	54%
Gasoline produced	thousand tons	432	146	195%	845	421	101%
Diesel & jet fuel produced	thousand tons	780	458	70%	1,443	966	49%
Motor fuels sales - domestic	thousand tons	686	491	40%	1,210	973	24%
Motor fuels sales - export	thousand tons	476	110	333%	963	361	167%
Export	%	41%	18%		44%	27%	
Domestic	%	59%	82%		56%	73%	

Refining segment comprises the results of the company Rompetrol Rafinare related to Petromidia and Vega refineries.
Rompetrol Rafinare computes Gross refinery margin as follows - (Oil Product Sales – Cost of Feedstock) / Quantity of sales.
Net Refinery margin is the EBITDA divided by quantity of sales.

Petromidia refinery is one of the most modern in the Black Sea region and represents approximately 40% of the refining capacity in Romania. The unit located in Navodari city has a stable flow of raw materials, mainly thanks to deliveries of Kazakh crude oil made with the support of KazMunayGas, the national oil and gas company of Kazakhstan.

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Gross revenues of the refining segment reached over USD 1.2 billion in Q2 2025 and over USD 2.3 billion in H1 2025, showing a 60% and respectively 37% increase as against same periods last year, as a result of an increase in sales volume levels.

In Q2 2025 the total throughput for Petromidia refinery was 1.45 million tons, higher by 84% as against same period last year, when the total throughput was 0.79 million tons. In Q2 2025, the total refinery throughput reached the level of 15.94 ktons per day of operation, based on crude availability (54% KEBCO, 46% a mix of sweet crude) and constant and continue units' operation.

Regarding the first half of 2025, the total throughput for Petromidia refinery was 2.79 million tons, up by 61% compared to the first half of 2024. This significant increase reflects the impact of the scheduled general turnaround carried out in H1 2024, which led to approximately two months of halted operations.

In Q2 2025 and H1 2025 the refining capacity utilization in Petromidia refinery was 98.72% and 95.52%, reflecting optimal crude availability, continuous high-capacity operation and strong market demand.

Petromidia refinery managed to achieve in H1 2025 a very good refining operational performance for the main operational parameters, such as:

- **White finished products yield** of 87.7%wt, exceeding the previous year by **0.7 percentage points**. This was supported by using lighter crude oil and the consumption of unfinished product stock accumulated at the start of the year;
- **Jet Fuel Production** set a record with **277 thousand tons** produced in H1 2025, representing **10.5%** of total crude processed – an increase of **153 thousand tons** compared to H1 2024. The refinery achieved a monthly record in **May 2025** with **50.6 thousand tons** of jet fuel produced. This performance was driven by increased Jet Fuel demand and strategic adjustments to maximize Jet production;
- **Technological loss** of 0.85%wt, reflecting stable operations and process control;
- **Energy Intensity Index (EII)** recorded a new low of 92.6%, an improvement of **15 points** versus the same period last year. This performance underlines the refinery's continued focus on energy efficiency and process optimization.

In respect of Vega refinery (the only domestic producer of bitumen and hexane), the total throughput was 105,467 tons in Q2 2025 and 180,575 tons in H1 2025, higher by 87.26%, respectively 53.77%, compared with the same periods last year when the total throughput was 56,322 tons in Q2 2024 and 117,434 tons for the first 6 months of 2024.

In the first 6 months of 2025 the refining capacity utilization for Vega refinery was higher by 59.57% compared with the same period last year.

Vega refinery also managed to achieve in H1 2025 good refining performance results, of which the following are emphasized:

- **Technological loss** of 0.69%;
- **Energy consumption** of 2.65 GJ/t.

The financial results of the refining segment have been supported by an increase in the volume of processed raw materials and of the petroleum products sold, as well as by the increase in net refining margin (26.5 USD/to in H1 2025 as against 19.7 USD/to in H1 2024).

Rompetrol Rafinare S.A. continued to be an important contributor to Romania's fiscal budget with approximately USD 400 million in Q2 2025 and over USD 771 million in H1 2025.

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PETROCHEMICALS SEGMENT

		Q2 2025	Q2 2024	%	H1 2025	H1 2024	%
Financial							
Revenues	USD	23,203,194	6,655,240	249%	45,848,485	34,119,299	34%
EBITDA	USD	(12,726,176)	(7,646,481)	66%	(29,701,250)	(23,932,396)	24%
EBIT	USD	(12,988,666)	(10,297,490)	26%	(27,473,616)	(29,436,708)	-7%
Net profit / (loss)	USD	(4,932,387)	(9,420,788)	-48%	(14,106,523)	(29,021,895)	-51%
Operational							
Propylene processed	thousand tons	19	11	73%	40	33	18%
Ethylene processed	thousand tons	13	-	N/A	13	-	N/A
Total polymers production	thousand tons	24	8	190%	40	24	63%
Sold from own production	thousand tons	20	6	258%	41	31	35%
Sold from trading	thousand tons	-	-	N/A	-	0.0	N/A
Total sold	thousand tons	20	6	258%	41	31	35%
Export	%	33%	44%		42%	44%	
Domestic	%	67%	56%		58%	56%	

Petrochemicals segment comprises the petrochemicals activity from Rompetrol Rafinare and the activity of Rompetrol Petrochemicals SRL

The polypropylene (PP) plant operates using raw material produced and supplied internally by the Petromidia refinery, while the low-density polyethylene (LDPE) plant relies on imported ethylene.

In Q2 2025 the total production of polymers in petrochemical division was 24 thousand tons, a significant increase compared to the similar period of last year when it produced 8 thousand tons in Q2 2024.

Similarly, in H1 2025 the total production of polymers in petrochemical division was 40 thousand tons, higher compared to H1 2024 when it produced 24 thousand tons.

The increase in total polymer production in the petrochemical segment was mainly caused by the continuous operation of both the PP and LDPE units. The LDPE unit was successfully restarted on April 30, 2025, contributing to the improved output in Q2.

The petrochemical segment is the only producer of polypropylene and polyethylene in Romania, with the ability to regain its competitive position on the domestic and regional market, once the profile market stabilizes.

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MARKETING SEGMENT

		Q2 2025	Q2 2024	%	H1 2025	H1 2024	%
Financial							
Gross Revenues	USD	898,409,127	786,125,117	14%	1,649,734,876	1,545,228,268	7%
EBITDA	USD	26,540,064	15,135,099	75%	46,422,888	39,634,743	17%
EBIT	USD	18,117,191	3,558,079	409%	29,819,761	15,275,797	95%
Net profit / (loss)	USD	8,588,987	2,565,215	235%	12,988,951	7,381,853	76%
Operational							
Fuels quantities sold in retail	thousand tons	294	309	-5%	553	578	-4%
Fuels quantities sold in wholesale	thousand tons	201	122	65%	349	263	33%
LPG quantities sold	thousand tons	68	44	55%	133	94	41%

Marketing segment includes the results of Rompetrol Downstream, Rom Oil, Rompetrol Quality Control, Rompetrol Logistics and Rompetrol Gas

In Q2 and H1 2025 the marketing segment had a turnover of over USD 898 million, respectively USD 1.65 billion, higher by 14% and 7% as against same periods last year, mainly due to the increase in quantities sold. A significant increase in wholesale sales can be observed, by 65% in Q2 2025 compared to Q2 2024, respectively by 33% in H1 2025 compared to H1 2024, and a slight decrease in retail sales, of only -5% and -4% in Q2 2025 and H1 2025, compared to similar periods of last year.

The decrease in retail sales volumes is partly attributed to a general decline in fuel demand. Meanwhile, the substantial increase in volumes sold on wholesale sales channels highlights Rompetrol's strategic effort to strengthen its market position.

Regarding the financial indicator EBITDA, it increased by 75% in Q2 2025 compared to Q2 2024 and by 17% in H1 2025 compared to the same period last year. This significant increase in EBITDA (+75%/+17%) compared to the increase in turnover (+14%/+7%) suggests increased operational efficiency and better management of direct and indirect costs. Among the most important factors that contributed to the positive variation in EBITDA are the increase in sales and profitability of non-petroleum products sold at fuel distribution stations, the increase in volumes sold through wholesale channels and the increase in the profitability of volumes sold through retail sales channels.

Overall, the distribution segment delivered a positive performance in the first half of 2025, with significant improvements in profitability, despite a moderate increase in turnover.

At the end of June 2025, Rompetrol Downstream's distribution segment contained 1,202 operative points of sale, including the network of owned stations, partner stations and mobile stations: expres, cuves and internal bases.

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APPENDIX 1 – CONSOLIDATED INCOME STATEMENT Q2 AND H1 2025, UNAUDITED

Amounts in USD

	Q2 2025	Q2 2024	%	H1 2025	H1 2024	%
Gross Revenues	1,476,939,627	1,019,794,632	45%	2,799,494,022	2,113,346,130	32%
Sales taxes and discounts	(404,739,520)	(273,568,555)	48%	(731,765,856)	(529,865,992)	38%
Net revenues	**1,072,200,107**	**746,226,077**	**44%**	**2,067,728,166**	**1,583,480,138**	**31%**
Cost of sales	(971,702,138)	(668,326,164)	45%	(1,897,725,474)	(1,428,146,472)	33%
Gross margin	**100,497,969**	**77,899,913**	**29%**	**170,002,692**	**155,333,666**	**9%**
Selling, general and administration	(77,858,838)	(99,207,867)	-22%	(148,530,932)	(176,595,800)	-16%
Other expenses, net	9,968,828	(9,675,661)	N/A	3,282,071	(1,671,567)	N/A
EBIT	**32,607,959**	**(30,983,615)**	**N/A**	**24,753,831**	**(22,933,701)**	**N/A**
Finance, net	(18,478,007)	(24,438,846)	-24%	(39,293,740)	(49,943,877)	-21%
Net foreign exchange gains / (losses)	(26,945,491)	1,228,883	N/A	(33,807,674)	3,742,872	N/A
EBT	**(12,815,539)**	**(54,193,578)**	**-76%**	**(48,347,583)**	**(69,134,706)**	**-30%**
Profit tax	(3,047,283)	2,842,416	N/A	(4,841,532)	(6,036,954)	-20%
Net result	**(15,862,822)**	**(51,351,162)**	**-69%**	**(53,189,115)**	**(75,171,660)**	**-29%**
EBITDA	**54,764,702**	**11,716,155**	**367%**	**77,586,067**	**44,922,722**	**73%**

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APPENDIX 2 – CONSOLIDATED BALANCE SHEET JUNE 30, 2025, UNAUDITED

Amounts in USD

	June 30, 2025	December 31, 2024	%
Assets			
Non-current assets			
Intangible assets	17,726,823	17,333,185	2%
Goodwill	82,871,706	82,871,706	0%
Property, plant and equipment	848,939,629	891,996,177	-5%
Right of use assets	272,932,580	276,551,758	-1%
Financial assets and other	16,201,890	7,838,702	107%
Deferred tax asset	21,306,903	21,306,903	0%
Total Non Current Assets	**1,259,979,531**	**1,297,898,431**	**-3%**
Current assets			
Inventories	287,728,501	428,898,189	-33%
Trade and other receivables	726,743,112	518,697,141	40%
Derivative financial Instruments	3,076,059	-	N/A
Cash and cash equivalents	211,671,619	94,030,970	125%
Total current assets	**1,229,219,291**	**1,041,626,300**	**18%**
Total assets	**2,489,198,822**	**2,339,524,731**	**6%**
Equity and liabilities			
Total Equity	**158,110,861**	**216,929,247**	**-27%**
Non-current liabilities			
Long-term debt	-	275,900,000	-100%
Provisions	114,506,094	110,055,666	4%
Obligations under lease agreements	294,694,045	268,112,687	10%
Other	21,171,612	16,329,235	30%
Total non-current liabilities	**430,371,751**	**670,397,588**	**-36%**
Current Liabilities			
Trade and other payables	1,502,937,202	1,326,932,258	13%
Contract liabilities	55,843,732	62,467,369	-11%
Derivative financial instruments	9,523,904	4,519,724	111%
Obligations under lease agreements	11,244,744	9,797,590	15%
Short-term debt	317,848,415	45,838,959	593%
Profit tax payable	3,318,213	2,641,996	26%
Total current liabilities	**1,900,716,210**	**1,452,197,896**	**31%**
Total equity and liabilities	**2,489,198,822**	**2,339,524,731**	**6%**

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The financial figures are extracted from Company's consolidated unaudited IFRS financial report as of 30 June 2025.

General Manager	**Finance Manager**
Sorin Graure	**Alexandru Stavarache**

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