

Aker Solutions ASA: Third-Quarter Results 2025

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Aker Solutions has delivered strong growth and solid margins in the third quarter of 2025. Several milestones have been met on the project portfolio in the period. The company now expects revenues in 2025 to exceed NOK 60 billion.

3Q 2025 Financial Highlights

(excluding special items)

- Revenue NOK 17.0 billion
- EBITDA NOK 1.5 billion
- EBITDA margin 8.8 percent
- Earnings per share NOK 1.79
- Net cash position NOK 2.5 billion
- Order intake NOK 10.3 billion (0.6x book-to-bill)
- Order backlog NOK 61.7 billion

"In a period of sustained high activity, we continue to reach important milestones across a range of projects while delivering strong revenue growth. This is a clear testament to the expertise and commitment of our people," said Kjetel Digre, Chief Executive Officer at Aker Solutions.

"Looking ahead, we are preparing for changing market conditions by improving our own efficiency as well as working with partners to mature future prospects into commercially sound energy projects," said Digre.

Key Developments

Third-quarter revenue increased to NOK 17.0 billion from NOK 13.2 billion in the same period last year. This represents a 29 percent increase. EBITDA excluding special items was NOK 1.5 billion, up from NOK 1.2 billion one year ago. The financial results in the quarter were driven by solid operational performance across Aker Solutions' business segments and the contribution from the 20 percent ownership in SLB OneSubsea. The underlying EBITDA margin for the quarter was 8.8 percent, or 7.2 percent excluding net income from SLB OneSubsea.

Activity levels continue to be high across business segments and locations. During the quarter, Aker Solutions met all key milestones in the Aker BP project portfolio and celebrated the official opening of the Ormen Lange Phase 3 project, where SLB OneSubsea has delivered the subsea compression system.

Order intake for the quarter was NOK 10.3 billion, and the secured backlog at the end of the quarter stood at NOK 61.7 billion.

The net cash position increased to NOK 2.5 billion in the quarter. Working capital reversal represented a cash outflow of NOK 548 million in the quarter, while CAPEX was NOK 94 million. During the quarter, Aker Solutions received dividends from its 20 percent ownership in SLB OneSubsea of NOK 142 million.

In the Renewables and Field Development segment, revenues increased 36 percent to NOK 12.5 billion with an underlying EBITDA margin of 8.0 percent. The legacy lump-sum projects continued to be a drag on margins in the period and commercial discussions with clients and sub-contractors are ongoing on these projects. The second-generation renewables projects with balanced risk-reward profiles are progressing well with healthy margins.

The Life Cycle segment reported revenues of NOK 3.8 billion with an underlying EBITDA margin of 7.2 percent in the quarter, driven by solid performance on long-term frame agreements and modification projects.

SLB OneSubsea, where Aker Solutions owns 20 percent, reported revenues of NOK 9.9 billion with an underlying EBITDA margin of 18.4 percent in the quarter. In the first three quarters of 2025, revenue in SLB OneSubsea was NOK 30.3 billion with an underlying EBITDA margin of 19.9 percent. The company has a solid financial position and an attractive dividend policy with ambitions to distribute about USD 280 million to its shareholders in 2025.

Outlook and Guidance

Based on secured revenues and backlog for the remainder of the year, Aker Solutions expects full-year 2025 revenues to exceed NOK 60 billion. EBITDA margins, excluding net income from SLB OneSubsea, are expected to be between 7.0 and 7.5 percent for the full year 2025. At this early stage, Aker Solutions expects 2026 revenues to be around NOK 45 billion.

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