

Aker Solutions ASA: Fourth-quarter and full-year 2025 results

06.02.2026 | [PR Newswire](#)

Aker Solutions delivered solid financial results in a period of record-high activity. The net cash position increased to NOK 3.7 billion, driven by strong cash generation and dividends from the company's 20 percent ownership in SLB OneSubsea. Aker Solutions intends to pay out dividends of NOK 3.60 per share for 2025.

2025 Full-year financial highlights (excluding special items)

- Revenue NOK 63.2 billion
- EBITDA NOK 5.3 billion
- EBITDA margin 8.4 percent
- Earnings per share NOK 6.10
- Order intake NOK 66.4 billion (1.1x book-to-bill)
- Board of Directors will propose dividend of NOK 3.60 per share for 2025

4Q 2025 Financial highlights (excluding special items)

- Revenue NOK 16.7 billion
- EBITDA NOK 1.3 billion
- EBITDA margin 7.9 percent
- Earnings per share NOK 1.50
- Order intake NOK 19.6 billion (1.2x book-to-bill)
- Order backlog NOK 64.8 billion

"Our results for the quarter and the full year demonstrate that we have delivered on the ambitious targets set back in 2024, reflecting solid project execution and continuous innovation across the organization," said Kjetel Digre, Chief Executive Officer of Aker Solutions.

"I am also encouraged by the way we are positioning our company for markets beyond the current project horizon, strengthening our offerings and broadening our offerings to support long-term value creation," said Digre.

Key developments

In the fourth quarter, revenue increased to NOK 16.7 billion from NOK 15.7 billion in the same period last year, representing a 6 percent increase. EBITDA excluding special items was NOK 1.3 billion with a margin of 7.9 percent.

For the full year, revenues increased to NOK 63.2 billion, a year-on-year growth of 19 percent. EBITDA excluding special items for the full year was NOK 5.3 billion or 8.4 percent. The underlying EBITDA-margin for 2025 excluding net income from SLB OneSubsea was 7.3 percent, in line with guiding.

Order intake in the quarter was NOK 19.6 billion, representing a book-to-bill ratio of 1.2x for the period. The total order backlog at the end of 2025 was NOK 66.4 billion. The secured backlog at the end of the year was NOK 64.8 billion.

Net cash position at year-end was NOK 3.7 billion. During the quarter, Aker Solutions received a dividend of NOK 402 million from its 20 percent ownership of SLB OneSubsea. For the full year of 2025, Aker Solutions has received a total dividend of NOK 1.6 billion from SLB OneSubsea.

Outlook

Aker Solutions expects revenues in 2026 to be between NOK 45 and 50 billion. Actions are being taken to adjust capacity costs for the expected activity levels. EBITDA-margins excluding net income from SLB OneSubsea are expected to be 7.0 and 7.5 percent in 2026.

The company continues to have a solid order backlog and high activity within tenders and early-phase studies. Life Cycle secured several important long-term frame agreements for maintenance and modifications services, enabling good visibility activity levels over the next 5-10 years.

Aker Solutions is also expanding its customer network through engineering and consultancy studies, leveraging its 5,000 engineering organization, powered by innovative digital solutions and artificial intelligence, to solve global energy challenges for future generations.

SLB OneSubsea is an important contributor to value creation in Aker Solutions, through its 20 percent ownership. This subsea company delivered revenues of USD 3.8 billion with an EBITDA-margin of 19.4 percent in 2025. Going forward OneSubsea has an ambition to secure new orders of more than USD 9 billion over the next two years, positioning for growth from 2027 onwards. At year-end, it had a net cash position of USD 567 million after dividend payments.

Capital allocation and dividend

Based on Aker Solutions' financial position and outlook, the Board of Directors will propose a dividend of NOK 3.60 per share for the fiscal year 2025, to be paid in 2026, pending approval in the Annual General Meeting on April 16, 2026. The dividend payment represents approximately 60 percent of net income excluding special items, in line with the ordinary dividend policy.

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