Fourth Quarter & Full-Year 2025 Earnings Presentation

February 17, 2026

Safe Harbor Statement

FORWARD-LOOKING STATEMENTS: Some statements in this presentation, as well as in other materials the company files with the Securities and Exchange Commission (SEC), release to the public, or make available on the company's website, constitute forward-looking statements that are subject to the safe harbor provisions of the Private Securities Litigation Reform Act of 1995. All statements in the future tense and all statements accompanied by words such as “expect,” “likely,” “outlook,” “forecast,” “preliminary,” “would,” “could,” “should,” “position,” “will,” “project,” “intend,” “plan,” “on track,” “anticipate,” “to come,” “may,” “possible,” “assume,” or similar expressions are intended to identify such forward-looking statements. These forward-looking statements include the company's view of business and economic trends for the coming year and the company's expectations regarding its ability to capitalize on these business and economic trends; the company's full-year 2026 outlook and the company's ability to successfully execute on its strategic priorities, including the company’s anticipated separation of Global Automotive and Global Industrial into two independent, publicly traded companies. Senior officers may also make verbal statements to analysts, investors, the media and others that are forward-looking. The company cautions you that all forward-looking statements involve risks and uncertainties, and while the company believes its expectations for the future are reasonable in view of currently available information, you are cautioned not to place undue reliance on the company's forward-looking statements. Actual results or events may differ materially from those indicated as a result of various important factors. Such factors may include, among other things, changes in general economic conditions, including persistent inflation (including the direct and indirect impact of tariffs and retaliatory tariffs) or deflation, geopolitical uncertainty and unrest and declining consumer confidence; the company’s ability to successfully implement the separation of Global Automotive and Global Industrial and achieve the anticipated benefits of such transaction; volatility in oil prices; significant costs, such as elevated fuel and freight expenses; the company's ability to maintain compliance with its debt covenants; its ability to successfully integrate acquired businesses into its operations and to realize the anticipated synergies and benefits; its ability to successfully implement its business initiatives in its three business segments; slowing demand for its products; the ability to maintain favorable supplier arrangements and relationships; changes in national and international legislation or government regulations or policies, including changes to global trade regulations, environmental and social policy, infrastructure programs and privacy legislation, and their impact to us, the company's suppliers and customers; changes in tax policies including those included in the One Big Beautiful Bill Act; volatile exchange rates; the company's ability to successfully attract and retain employees in the current labor market; uncertain credit markets and other macroeconomic conditions; competitive product, service and pricing pressures; failure or weakness in its disclosure controls and procedures and internal controls over financial reporting, including as a result of the work from home environment; the uncertainties and costs of litigation; public health emergencies, including the effects on the financial health of the company's business partners and customers, on supply chains and its suppliers, on vehicle miles driven as well as other metrics that affect the company's business, and on access to capital and liquidity provided by the financial and capital markets; disruptions caused by a failure or breach of the company's information systems; the success of its global restructuring efforts and the annualized cost savings arising therefrom, as well as other risks and uncertainties discussed in the company's Annual Report on Form 10-K and from time to time in its subsequent filings with the SEC. Forward-looking statements speak only as of the date they are made, and the company undertakes no duty to update any forward-looking statements except as required by law. You are advised, however, to review any further disclosures the company makes on related subjects in subsequent Forms 10-K, 10-Q, 8-K and other reports filed with the SEC.

NON-GAAP MEASURES: This presentation contains certain financial information not derived in accordance with United States (“U.S.”) generally accepted accounting principles (“GAAP”). These items include adjusted gross profit, adjusted selling, administrative and other expenses, adjusted EBITDA, adjusted EBITDA margin, adjusted net income, adjusted diluted net income per common share and free cash flow. The company believes that the presentation of adjusted gross profit, adjusted selling, administrative and other expenses, adjusted EBITDA, adjusted EBITDA margin, adjusted net income, adjusted diluted net income per common share and free cash flow, when considered together with the corresponding GAAP financial measures and the reconciliations to those measures, provide meaningful supplemental information to both management and investors that is indicative of the company's core operations. The company considers these metrics useful to investors because they provide greater transparency into management’s view and assessment of the company’s ongoing operating performance by removing items management believes are not representative of the company’s continuing operations and may distort the company’s longer-term operating trends. The company believes these measures are useful and enhance the comparability of results from period to period and with competitors, as well as show ongoing results from operations distinct from items that are infrequent or not associated with the company’s core operations. The company does not, nor does it suggest investors should, consider such non-GAAP financial measures as superior to, in isolation from, or as a substitute for, GAAP financial information. The company has included a reconciliation of this additional information to the most comparable GAAP measure following the financial statements below. The company does not provide forward-looking guidance for certain financial measures on a GAAP basis because the company is unable to predict certain items contained in the GAAP measures without unreasonable efforts. These items may include acquisition-related costs, litigation charges or settlements, impairment charges, restructuring costs and certain other unusual adjustments.

GPC Snapshot (as of 12/31/2025)

Key Statistics

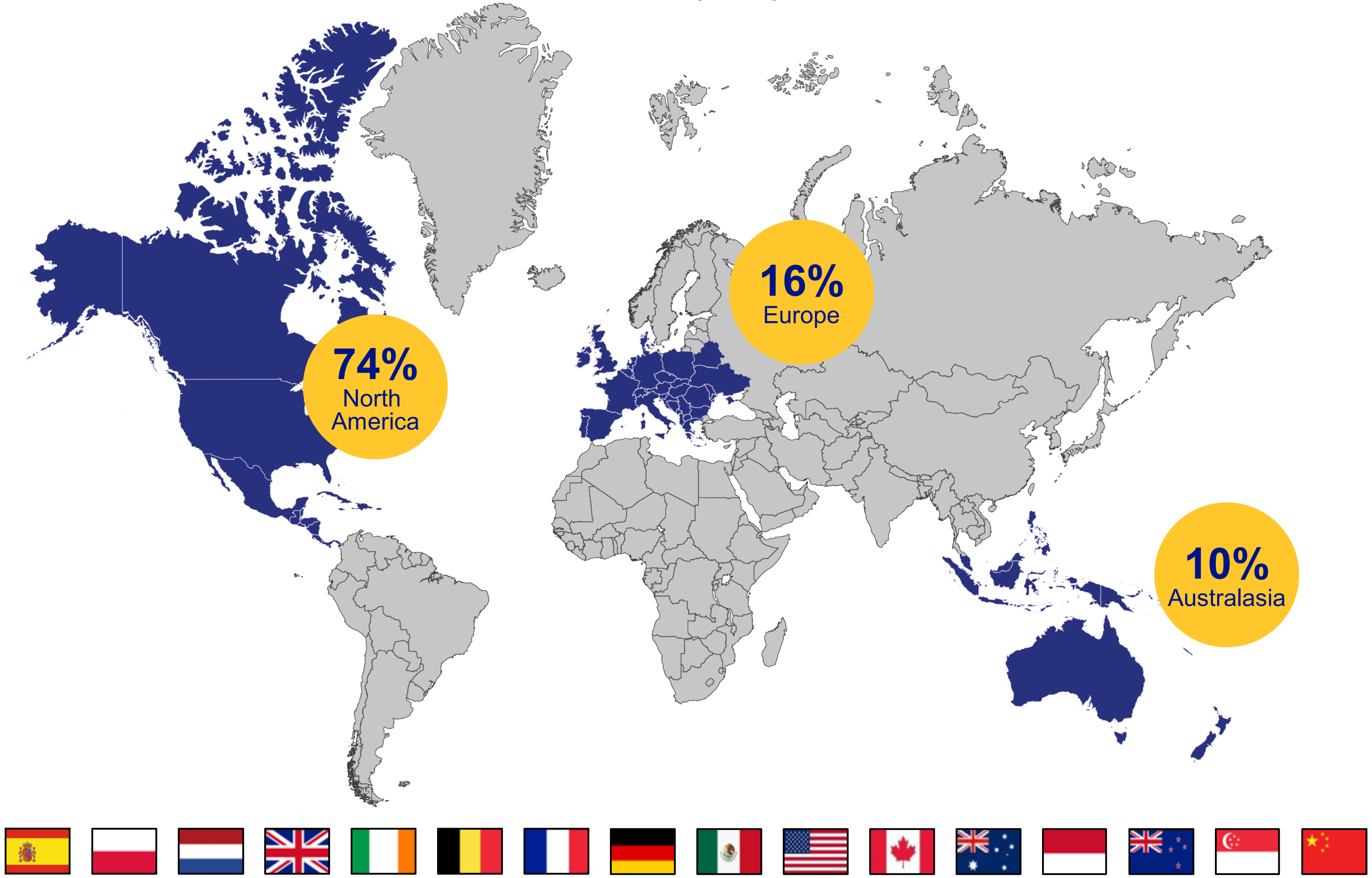
Founded	**1928**
Headquarters	**Atlanta, GA**
Countries Served	**17**
Locations	**~10,815**
• Distribution Centers	~195
• Branches/Service Centers	~720
• Retail (Owned/Independent)	~9,900
Employees	**65,000+**

2025 Financial Highlights

Revenue	**$24.3B**
• North America Automotive	39%
• International Automotive	24%
• Industrial	37%
Adj. EBITDA Margin[1]	**8.3%**
Dividend Yield[2]	**3.4%**

Global Footprint

2025 Revenue by Region



Leading Global Distributor and Solutions Provider in Diversified "Break Fix" End Markets

[1]See Appendix B [2]Calculated based on annual dividend per share divided by share price as of 12/31/25

Key Messages

- ✓ We want to **thank our GPC teammates across the globe** for their **dedication and commitment to serving our customers**
- ✓ Full-year results came in below our expectations, **due to softer than expected sales in the fourth quarter** which impacted profit
- ✓ We **advanced our strategy and delivered growth, expanded gross margins, took proactive action to offset cost inflation and invested in strategic capabilities** while navigating another dynamic year
- ✓ Our Board approved the **70th consecutive annual increase to the GPC dividend**
- ✓ Announces plan to separate **automotive and industrial businesses into two industry-leading public companies**

Better Positioning Our Businesses for an Even Stronger Future

FY'25 Performance: GPC Executive Summary

GPC	Global Sales **$24.3B** Increased 3.5%	Adj Gross Margin[1] **37.5%** Improved 90 bps	Adj EBITDA[1] **$2.0B** Increased 0.5%	Adj EBITDA Margin[1] **8.3%** Decreased 20 bps	Adj Diluted EPS[1] **$7.37** Decreased 9.7%

Industrial	Total Sales **$8.9B** Increased 2.3%	Comp Sales[2] **+1.5%**	Segment EBITDA[1] **$1.1B** Increased 4.0%	Segment EBITDA Margin[1] **12.9%** Improved 30 bps
N. America Automotive	Total Sales **$9.5B** Increased 3.3%	Comp Sales[2] **+0.6%**	Segment EBITDA[1] **$672M** Decreased 6.1%	Segment EBITDA Margin[1] **7.1%** Decreased 70 bps
International Automotive	Total Sales **$5.9B** Increased 5.4%	Comp Sales[2] **+0.2%**	Segment EBITDA[1] **$544M** Decreased 4.2%	Segment EBITDA Margin[1] **9.3%** Decreased 90 bps

All comparisons are YoY unless otherwise stated [1]Non-GAAP financial measures reconciled in Appendix B [2]See Appendix A

Q4'25 Performance: GPC Executive Summary

Global Sales	Adj Gross Margin[1]	Adj EBITDA[1]	Adj EBITDA Margin[1]	Adj Diluted EPS[1]
$6.0B	**37.6%**	**$459M**	**7.6%**	**$1.55**
Increased 4.1%	Improved 70 bps	Increased 5.7%	Improved 10 bps	Decreased 3.7%

During 2025

Cash From Operations

$891M

As of December 31, 2025

Working Capital[2]

$777M

Capital Structure

2.4x

Total Debt to Adj EBITDA[1]

Ample Liquidity

$1.5B

Financial Strength and Flexibility to Drive Growth

Softer Than Expected Sales Led to Lower Profit Dollars

All comparisons are YoY unless otherwise stated [1] Non-GAAP financial measures reconciled in Appendix B [2] Working capital is defined as current assets less current liabilities

Q4’25 Performance: Industrial

Total Sales	Comp Sales[1]	Segment EBITDA[2]	Segment EBITDA Margin[2]
$2.2B	**+3.4%**	**$295M**	**13.4%**
Increased 4.6%		Increased 8.7%	Improved 50 bps

Market	Total Sales[3]
North America	+4.9%
Australasia	(0.6%)

2025 Accomplishments:

- ✓ Grew in excess of the market in 2025 despite a sluggish industrial and manufacturing economy
- ✓ Saw growth in 7 of 14 end markets during the year, up from 4 in 2024
- ✓ MRO business grew over 3% during the year, with shared strength in both local and corporate account customers
- ✓ E-Commerce represented ~45% of sales, up over 800 bps from 2024, as we continue to integrate more closely with our customers via technology

Profitable Growth Despite Soft Demand Environment & Persistent Cost Inflation

[1]See Appendix A; [2]See Appendix B; [3]Local Currency; All comparisons are YoY unless otherwise stated

Q4'25 Performance: Automotive

	Total Sales	Comp Sales[1]	Segment EBITDA[2]	Segment EBITDA Margin[2]
N. America Automotive	**$2.3B** Increased 2.4%	**+1.7%**	**$129M** Decreased 14.0%	**5.5%** Decreased 110 bps
International Automotive	**$1.5B** Increased 6.4%	**-0.9%**	**$129M** Decreased 4.3%	**8.7%** Decreased 100 bps

Market	Total Sales[3]	Comp Sales[1,3]
U.S.	+1.8%	+1.9%
Canada	+5.5%	+0.7%
Europe	(1.9%)	(3.1%)
Australasia	+5.2%	+4.6%

2025 Accomplishments:

- ✓ U.S. saw strong sales growth from company-owned stores
- ✓ Closed competitive acquisition in Canada that adds talent, store footprint in priority markets and a diversified product offering
- ✓ Europe continues to see growth with key account customers and further expansion of the NAPA brand despite soft market conditions
- ✓ Australasia delivered double-digit growth in local currency in 2025, further establishing GPC Asia Pacific as the market leader

GPC

Diversified Global Sales Growth in Dynamic, Inflationary Environment

[1]See Appendix A; [2]See Appendix B; [3]Local Currency; All comparisons are YoY unless otherwise stated

Strategic Investment Priorities

Talent & Culture

Develop high-potential talent and infuse capabilities into the organization to build diverse, high-performing teams

Sales Effectiveness

Utilize data and analytics to understand our customer segments and drive solution-based sales and commercial strategies

Supply Chain

Modernize operations to increase productivity and efficiency across inventory, facilities and logistics capabilities

Emerging Technology

Lead in emerging technologies and leverage our unique positioning, global scale and One GPC team approach

Technology

Enhance data and digital capabilities to deliver a best-in-class customer experience, profitable growth and operational productivity

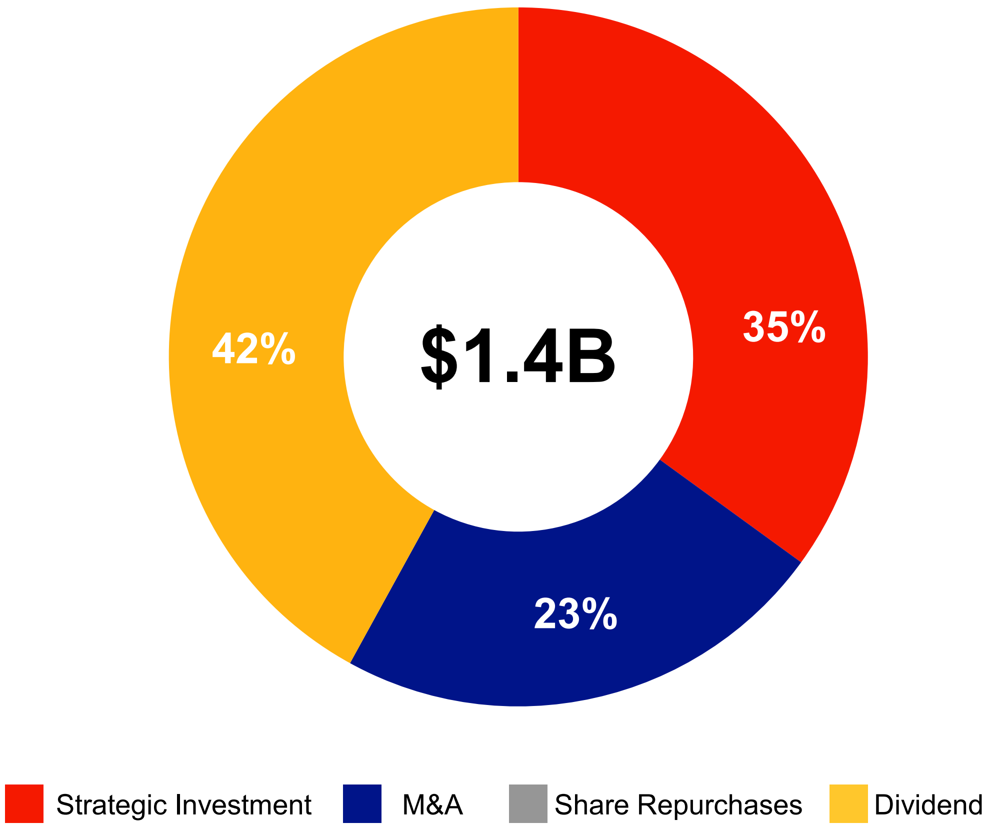
Mergers & Acquisitions

Acquire strategic assets and create value via scale, footprint, customer relationships, products and services and technology

Investing in Existing and New Capabilities to Create a Better Customer Experience

GPC Capital Allocation: 2025 and 2026 Outlook

2025 Capital Deployment



Key Priorities

Strategic Investments

- ✓ **$470M FY'25 Capital Expenditures**
- Estimated $450M – $500M FY'26 Capital Expenditures

M&A

- ✓ **$318M FY'25 Capital Deployed**
- Estimated $300M – $350M FY'26 M&A Capital Outlay

Share Repurchases

- ✓ ~7.5 million shares remain available for repurchase

Dividend

- ✓ **$564M FY'25 Cash Dividends Paid**
- ✓ **FY'26 Cash Dividend of $4.25 Per Share, +3.2% From 2025**
  - **70th consecutive year** of increased dividends paid to our shareholders

Disciplined and Consistent Approach to Strategic Capital Allocation

GPC 2026 Outlook: Total GPC[1]

Total Sales Growth	**3% to 5.5%**
Comp Sales Growth	2% to 4.5%
Adj Gross Margin[2]	+40 bps to +60 bps
Adj SG&A as a % of Sales[2]	(50) bps to (30) bps
Adj EBITDA[2]	$2.0B to $2.2B
Adj EBITDA Growth[2]	2% to 9%
Diluted EPS	$6.10 to $6.60
Adj Diluted EPS[2]	**$7.50 to $8.00**
Adj EPS Growth[2]	2% to 9%
Cash From Operations	**$1.0B to $1.2B**
Free Cash Flow[2]	$550M to $700M
Other	
• Capex	$450M to $500M
• Depreciation & Amortization	$515M to $540M
• Interest Expense	$180M to $190M
• Corporate EBITDA as a % of Sales[2]	1.5% to 2%
• Tax Rate	~24%

[1] Our guidance considers several factors, including recent business trends and financial results, current growth plans, strategic initiatives, global economic outlook, current trade environment and geopolitical conflicts and the potential impact these factors may have on results. [2] A non-GAAP measure (See Appendix B)

GPC 2026 Outlook: By Segment[1]

Automotive

North America Automotive	
Total Sales Growth	3% to 5%
Comp Sales Growth	1.5% to 3.5%
EBITDA[2]	\$700M to \$730M
EBITDA Growth[2]	5% to 9%

International Automotive	
Total Sales Growth	3% to 6%
Comp Sales Growth	1.5% to 3.5%
EBITDA[2]	\$560M to \$600M
EBITDA Growth[2]	4% to 10%

Global Automotive	
Total Sales Growth	3% to 5%
Comp Sales Growth	1.5% to 3.5%
EBITDA[2]	\$1.26B to \$1.33B
EBITDA Growth[2]	4% to 9%

Industrial

Industrial	
Total Sales Growth	3% to 6%
Comp Sales Growth	3% to 6%
EBITDA[2]	\$1.22B to \$1.28B
EBITDA Growth[2]	7% to 12%

[1] Our guidance considers several factors, including recent business trends and financial results, current growth plans, strategic initiatives, global economic outlook, current trade environment and geopolitical conflicts and the potential impact these factors may have on results. [2] A non-GAAP measure (See Appendix B)

GPC 2026 Outlook: U.S. Business Days

U.S. Business Days*	Q1	Q2	Q3	Q4	FY
2026	63	64	64	63	254
2025	63	64	64	63	254
Difference	0	0	0	0	0

**Our calculation of comparable sales is computed using total business days for the period, not calendar days. We believe a business day approach is a better representation given the fluctuations of weekend operating hours, particularly at our Motion facilities and independently owned NAPA stores in the U.S.*

FY'26 Outlook: Number of U.S. Business Days in 2026 Unchanged from 2025

Appendix

Other Information

Comparable Sales: Comparable sales or “comp sales” is a key metric that refers to period-over-period comparisons of the company’s net sales excluding the impact of acquisitions, foreign currency and other. The company’s calculation of comparable sales is computed using total business days for the period and is inclusive of sales from company-owned stores and sales into independent stores. The company considers this metric useful to investors because it provides greater transparency into management’s view and assessment of the company’s core ongoing operations. This is a metric that is widely used by analysts, investors and competitors, however the company’s calculation of the metric may not be comparable to similar measures disclosed by other companies, because not all companies and analysts calculate this metric in the same manner.

Daily Sales: Daily sales represents the amounts invoiced to the company's customers each day. Daily sales do not represent GAAP-based sales because, among other things, invoices are not always generated at the same time goods and services are delivered to customers and the amounts do not include adjustments for estimates of returns, rebates or other forms of variable consideration. Management uses this metric to monitor demand trends at each of its subsidiaries throughout each month for the purposes of monitoring performance against forecasts and to make operational decisions. The company considers this metric useful to investors because it provides greater transparency into management’s view and assessment of the company’s core ongoing operations. The calculation of this metric may not be comparable to similar measures disclosed by other companies, because not all companies and analysts calculate this metric in the same manner.

Segment Data

Appendix B

Reconciliation of EBITDA to Net Income (Loss)

	2025	2025				2024			
(in thousands)	Full Year	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Net sales:									
North America Automotive	$ 9,520,042	$ 2,264,781	$ 2,444,377	$ 2,484,591	$ 2,326,293	$ 2,196,890	$ 2,352,254	$ 2,390,463	$ 2,272,631
International Automotive	5,858,566	1,400,107	1,467,904	1,505,197	1,485,358	1,377,130	1,374,737	1,409,326	1,395,702
Industrial	8,921,533	2,201,181	2,252,144	2,270,444	2,197,764	2,209,611	2,235,576	2,170,409	2,101,840
Segment EBITDA:									
North America Automotive	672,182	146,995	196,500	199,626	129,061	152,368	215,290	197,873	149,999
International Automotive	544,173	138,512	141,492	135,078	129,091	167,308	147,579	118,269	134,845
Industrial	1,146,422	278,711	288,138	285,015	294,558	278,987	284,960	267,287	270,954
Corporate EBITDA	(357,175)	(91,125)	(78,632)	(93,374)	(94,044)	(82,140)	(78,480)	(106,686)	(121,911)
Interest expense, net	(163,506)	(37,216)	(40,211)	(40,342)	(45,737)	(17,690)	(21,921)	(27,818)	(29,398)
Depreciation and amortization	(538,023)	(115,435)	(123,018)	(127,475)	(172,095)	(90,610)	(99,202)	(106,036)	(112,130)
Other unallocated costs	(1,251,905)	(68,805)	(45,712)	(66,835)	(1,070,553)	(83,042)	(62,025)	(45,296)	(125,366)
Income (loss) before income taxes	52,168	251,637	338,557	291,693	(829,719)	325,181	386,201	297,593	166,993
Income taxes benefit (expense)	13,777	(57,245)	(83,677)	(65,522)	220,221	(76,287)	(90,657)	(71,011)	(33,937)
Net income (loss)	$ 65,945	$ 194,392	$ 254,880	$ 226,171	$ (609,498)	$ 248,894	$ 295,544	$ 226,582	$ 133,056
Segment EBITDA margin:									
North America Automotive	7.1%	6.5%	8.0%	8.0%	5.5%	6.9%	9.2%	8.3%	6.6%
International Automotive	9.3%	9.9%	9.6%	9.0%	8.7%	12.1%	10.7%	8.4%	9.7%
Industrial	12.9%	12.7%	12.8%	12.6%	13.4%	12.6%	12.7%	12.3%	12.9%
Total adj EBITDA margin	8.3%	8.1%	8.9%	8.4%	7.6%	8.9%	9.5%	8.0%	7.5%

Reconciliation of Non-GAAP Financial Measures

Appendix B

Reconciliation of Net Income (Loss) to Adj EBITDA

	2025	2025				2024			
(in thousands)	Full Year	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
GAAP net income	$ 65,945	$ 194,392	$ 254,880	$ 226,171	$ (609,498)	$ 248,894	$ 295,544	$ 226,582	$ 133,056
Depreciation and amortization	538,023	115,435	123,018	127,475	172,095	90,610	99,202	106,036	112,130
Interest expense, net	163,506	37,216	40,211	40,342	45,737	17,690	21,921	27,818	29,398
Income taxes (benefit)	(13,777)	57,245	83,677	65,522	(220,221)	76,287	90,657	71,011	33,937
EBITDA:	753,697	404,288	501,786	459,510	(611,887)	433,481	507,324	431,447	308,521
Restructuring and other costs (1)	253,961	54,770	45,712	66,835	86,644	83,042	37,247	41,023	59,695
Acquisition and integration related costs and other (2)	14,035	14,035	—	—	—	—	24,778	4,273	4,075
Inventory rebranding strategic initiative (3)	—	—	—	—	—	—	—	—	61,596
Asbestos-related product liability (4)	103,352	—	—	—	103,352	—	—	—	—
Pension settlement (5)	741,967	—	—	—	741,967	—	—	—	—
First Brands credit loss allowance (6)	150,500	—	—	—	150,500	—	—	—	—
Retirement obligation and other (7)	(11,910)	—	—	—	(11,910)	—	—	—	—
Adjusted EBITDA	$ 2,005,602	$ 473,093	$ 547,498	$ 526,345	$ 458,666	$ 516,523	$ 569,349	$ 476,743	$ 433,887

Refer to Explanation of Adjustments for further information

Reconciliation of Non-GAAP Financial Measures (Cont.) Appendix B

Reconciliation of Net Income (Loss) to Adj Net Income

(in thousands)	2025 Full Year	2025 Q1	2025 Q2	2025 Q3	2025 Q4	2024 Q1	2024 Q2	2024 Q3	2024 Q4
GAAP net income (loss)	$ 65,945	$ 194,392	$ 254,880	$ 226,171	$ (609,498)	$ 248,894	$ 295,544	$ 226,582	$ 133,056
Adjustments:									
Restructuring and other costs (1)	253,961	54,770	45,712	66,835	86,644	83,042	37,247	41,023	59,695
Acquisition and integration related costs and other (2)	14,035	14,035	—	—	—	—	24,778	4,273	4,075
Inventory rebranding strategic initiative (3)	—	—	—	—	—	—	—	—	61,596
Asbestos-related product liability (4)	103,352	—	—	—	103,352	—	—	—	—
Pension settlement (5)	741,967	—	—	—	741,967	—	—	—	—
First Brands credit loss allowance (6)	150,500	—	—	—	150,500	—	—	—	—
Retirement obligation and other (7)	30,111	—	—	—	30,111	—	—	—	—
Total adjustments	1,293,926	68,805	45,712	66,835	1,112,574	83,042	62,025	45,296	125,366
Tax impact of adjustments	(333,450)	(20,124)	(8,805)	(17,411)	(287,110)	(21,038)	(16,008)	(8,865)	(34,053)
Adjusted net income	$ 1,026,421	$ 243,073	$ 291,787	$ 275,595	$ 215,966	$ 310,898	$ 341,561	$ 263,013	$ 224,369

Refer to Explanation of Adjustments for further information; Figures may not foot due to rounding

Reconciliation of Non-GAAP Financial Measures (Cont.)

Appendix B

Reconciliation of Diluted Net Income (Loss) Per Common Share to Adj Diluted Net Income Per Common Share

	2025	2025				2024			
(in thousands, except per share data)	Full Year	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
GAAP diluted net income (loss) per common share	$ 0.47	$ 1.40	$ 1.83	$ 1.62	$ (4.39)	$ 1.78	$ 2.11	$ 1.62	$ 0.96
Adjustments:									
Restructuring and other costs (1)	1.82	0.39	0.33	0.48	0.62	0.59	0.27	0.29	0.43
Acquisition and integration related costs and other (2)	0.10	0.10	—	—	—	—	0.17	0.03	0.03
Inventory rebranding strategic initiative (3)	—	—	—	—	—	—	—	—	0.44
Asbestos-related product liability (4)	0.74	—	—	—	0.74	—	—	—	—
Pension settlement (5)	5.33	—	—	—	5.34	—	—	—	—
First Brands credit loss allowance (6)	1.08	—	—	—	1.08	—	—	—	—
Retirement obligation and other (7)	0.22	—	—	—	0.22	—	—	—	—
Total adjustments	9.29	0.49	0.33	0.48	8.00	0.59	0.44	0.32	0.90
Tax impact of adjustments	(2.39)	(0.14)	(0.06)	(0.12)	(2.06)	(0.15)	(0.11)	(0.06)	(0.25)
Adjusted diluted net income per common share	$ 7.37	$ 1.75	$ 2.10	$ 1.98	$ 1.55	$ 2.22	$ 2.44	$ 1.88	$ 1.61
Weighted average common shares outstanding — assuming dilution	139,250	139,200	139,244	139,406	138,903	140,096	139,829	139,599	139,272

Refer to Explanation of Adjustments for further information; Figures may not foot due to rounding

Reconciliation of Non-GAAP Financial Measures (Cont.) Appendix B

Reconciliation of Gross Profit to Adj Gross Profit

(in thousands)	Three Months Ended December 31, 2025	Three Months Ended December 31, 2024	Twelve Months Ended December 31, 2025	Twelve Months Ended December 31, 2024
GAAP gross profit	$ 2,101,224	$ 2,070,216	$ 8,940,698	$ 8,523,615
Adjustments:				
Restructuring and other costs (1)	—	—	—	7,487
Inventory rebranding strategic initiative (3)	—	61,596	—	61,596
First Brands credit loss allowance (6)	150,500	—	150,500	—
Retirement obligation and other (7)	9,700	—	9,700	—
Total adjustments	160,200	61,596	160,200	69,083
Adjusted gross profit	$ 2,261,424	$ 2,131,812	$ 9,100,898	$ 8,592,698
Net Sales	$ 6,009,415	$ 5,770,173	$ 24,300,141	$ 23,486,569
Gross profit as a percent of net sales	35.0%	35.9%	36.8%	36.3%
Adjusted gross profit as a percent of net sales	37.6%	36.9%	37.5%	36.6%

Refer to Explanation of Adjustments for further information

Reconciliation of Non-GAAP Financial Measures (Cont.)

Reconciliation of Selling, Administrative & Other Expenses to Adj Selling, Administrative & Other Expenses

(in thousands)	Three Months Ended December 31, 2025	Three Months Ended December 31, 2024	Twelve Months Ended December 31, 2025	Twelve Months Ended December 31, 2024
GAAP selling, administrative and other expenses	$ 1,864,241	$ 1,698,117	$ 7,151,043	$ 6,642,900
Adjustments:				
Acquisition and integration related costs and other (2)	—	(4,075)	(14,035)	(33,126)
Asbestos-related product liability (4)	(103,352)	—	(103,352)	—
Retirement obligation and other (7)	21,610	—	21,610	—
Total adjustments	(81,742)	(4,075)	(95,777)	(33,126)
Adjusted selling, administrative and other expenses	$ 1,782,499	$ 1,694,042	$ 7,055,266	$ 6,609,774
Net Sales	$ 6,009,415	$ 5,770,173	$ 24,300,141	$ 23,486,569
GAAP SG&A expenses as a percent of net sales	31.0%	29.4%	29.4%	28.3%
Adjusted SG&A expenses as a percent of net sales	29.7%	29.4%	29.0%	28.1%

Refer to Explanation of Adjustments for further information

Reconciliation of Non-GAAP Financial Measures (Cont.) Appendix B

Reconciliation of Net Cash Provided by Operating Activities to Free Cash Flow

(in thousands)	Twelve Months Ended December 31, 2025
Net cash provided by operating activities	$ 890,762
Purchases of property, plant and equipment	(469,838)
Free cash flow	$ 420,924

Outlook

(in thousands)	For the Year Ending December, 31 2026
Net cash provided by operating activities	$1.0 billion to $1.2 billion
Purchases of property, plant and equipment	$450 million to $500 million
Free Cash Flow	$550 million to $700 million

Explanation of Adjustments

Appendix B

(1) **Restructuring and other costs:** Adjustment reflects costs related to the company's global restructuring initiative which includes a voluntary retirement offer in the U.S. in 2024, and rationalization and optimization of certain distribution centers, stores and other facilities.

(2) **Acquisition and integration related costs and other:** Adjustment primarily reflects lease and other exit costs related to the integration of acquired independent automotive stores.

(3) **Inventory rebranding strategic initiative:** Adjustment reflects a charge to write down certain existing inventory associated with a new global rebranding and relaunch of a key tool and equipment offering. The existing inventory that will be liquidated is comprised of otherwise saleable inventory, and the liquidation does not arise from the company's normal, recurring operational activities.

(4) **Asbestos-related product liability:** Adjustment reflects a remeasurement of the company's asbestos-related product liability for a revised estimate of the number of claims to be incurred in future periods based on adverse current year changes in the claims environment, among other assumptions.

(5) **Pension settlement:** Adjustment reflects a pension charge related to the settlement of the company's U.S. qualified defined benefit plan (U.S. pension plan).

(6) **First Brand credit loss allowance:** Adjustment reflects a charge for expected credit losses on volume purchase rebates and other amounts due from First Brands, a key automotive parts supplier who filed for Chapter 11 bankruptcy.

(7) **Retirement obligation and other:** Adjustment reflects certain nonroutine charges recorded during the quarter ended December 31, 2025, including a charge related to certain asset retirement obligations.

Business Separation Announcement

Genuine Parts Company Announces Plan to Separate Automotive and Industrial Businesses Into Two Industry-Leading Public Companies

February 17, 2026

Safe Harbor Statement

FORWARD-LOOKING STATEMENTS: Certain statements in this presentation that are not historical facts constitute forward-looking statements that are subject to the safe harbor provisions of the Private Securities Litigation Reform Act of 1995. Such forward-looking statements generally can be identified by the use of forward-looking terminology, such as “intended,” “targeted,” “expected,” “planned,” “positioned,” "will,” and similar terminology. While the company believes expectations for the future are reasonable in view of currently available information, these forward-looking statements involve risks and uncertainties that could cause actual results or events to differ materially from those contained in the forward-looking statements. These risks and uncertainties include factors such as (a) uncertainties as to the timing of the separation and whether it will be completed; (b) the possibility that various closing conditions for the separation may not be satisfied; (c) failure of the separation to qualify for the expected tax treatment; (d) the risk that Global Automotive and Global Industrial will not be separated successfully or such separation may be more difficult, time-consuming and/or costly than expected; (e) the possibility that the strategic, operational and financial opportunities from the separation may not be achieved; and (f) the other risks, uncertainties and other factors discussed under "Risk Factors" discussed in the company’s Annual Report on Form 10-K for the year ended December 31, 2024, Quarterly Report on Form 10-Q for the quarter ended March 31, 2025 and from time to time in the company’s subsequent filings with the Securities and Exchange Commission. Statements in this presentation that are "forward-looking" include, without limitation, statements regarding the planned separation of Global Automotive and Global Industrial, the timing of any such separation, the expected benefits of the separation, and the future performance of Global Automotive and Global Industrial if the separation is completed. You are cautioned not to place undue reliance on these forward-looking statements, which speak only as of the date of this presentation. The company undertakes no duty to update any forward-looking statements except as required by law. You are advised, however, to review any further disclosures on related subjects in the company’s subsequent Forms 10-K, 10-Q, 8-K and other reports filed with the Securities and Exchange Commission.

NON-GAAP MEASURES: This presentation contains certain financial information not derived in accordance with United States (“U.S.”) generally accepted accounting principles ("GAAP"). These items include EBITDA and adjusted EBITDA. The company believes that the presentation of these non-GAAP measures when considered together with the corresponding GAAP financial measures and the reconciliations to those measures, provide meaningful supplemental information to both management and investors that is indicative of the company’s core operations. The company considers these metrics useful to investors because they provide greater transparency into management’s view and assessment of the company’s ongoing operating performance by removing items management believes are not representative of the company’s operations and may distort the company’s longer-term operating trends. The company believes these measures are useful and enhance the comparability of the results from period to period and with the company’s competitors, as well as show ongoing results from operations distinct from items that are infrequent or not associated with the company’s core operations. The company does not, nor does it suggest investors should, consider such non-GAAP financial measures as superior to, in isolation from, or as a substitute for, GAAP financial information. The company has included reconciliations of this additional information to the most comparable GAAP measure in the appendix of this presentation. The company does not provide forward-looking guidance for certain financial measures on a GAAP basis because the company is unable to predict certain items contained in the GAAP measures without unreasonable efforts. These items may include acquisition-related costs, litigation charges or settlements, impairment charges, and certain other unusual adjustments.

GPC Made Meaningful Progress Over the Past 10 Years…

- Grew **Revenue From $15B to $24B** With **Adjusted EBITDA Growing Over $700M to ~$2.0B**[1,2]
- **Simplified Business Mix** From Four Segments **to Two Leadership Platforms**
- Established a **Global Footprint in Europe, U.K., Canada, Australasia**
- Added to **Industry-Leading Scale in Global Industrial With KDG Acquisition**
- **Invested Over $3B**[3] to Modernize Sales, Technology and Supply Chain Offerings to Create Leadership Platforms Positioned for Success
- **Invested in Talent to Evolve Culture,** Capabilities and Governance
- **Returned ~$7B of Capital** to Shareholders With Dividend and Repurchases[4]

Global Automotive

$15.4B Sales, $1.2B EBITDA[2,5]
in FY'25

Global Industrial

$8.9B Sales, $1.1B EBITDA[2,5]
in FY'25

Source: Company filings

Note: [1] Revenue growth based on 2025 vs. 2015; [2] See Appendix; [3] Based on total capital expenditures from 2015 – 2025; [4] Based on total dividends and share repurchases from 2015 – 2025; [5] Excludes corporate expense

… to Transform and Create Leading Automotive and Industrial Distribution Platforms

The Separation of Two Businesses Unlocks Value…

Following a comprehensive strategic and operational review, GPC's Board of Directors has concluded that the separation of Global Automotive and Global Industrial is expected to unlock long-term value for shareholders

Why Now?

Allows Global Automotive to focus on **operational transformation initiatives** to accelerate growth and margin expansion and Global Industrial to **expand its market leadership** as the market recovers

Operating Clarity

Creates dedicated platforms that **improve operating clarity and execution speed** at each company to **deliver greater customer value and long-term shareholder returns**

Customer-Led Decision Focus

Establishes **separate management teams with tailored expertise, strategies and decision-making authority** to better address customer needs

Financial Flexibility

Provides **enhanced financial flexibility to enable strategic investments that accelerate profitable growth, improve productivity and extend market leadership** positions

Tailored Capital Allocation

Allows **each business to design capital structures and capital allocation strategies aligned with specific business objectives**, while **targeting investment-grade credit metrics at each** company

Focused Investor Message

Enables **each business to attract a long-term investor base through a clear, compelling and differentiated investment profile**

… by Creating Clarity and Better Positioning Each Business to Execute Its Strategy

Creating Two Focused, Independent Companies...

Global Automotive

NAPA · ALLIANCE AUTOMOTIVE GROUP · Repco · UAP

$15.4B FY'25 Sales

$1.2B FY'25 EBITDA[1]

- **The Largest Global Automotive Aftermarket Parts and Solutions Provider** With Leading Commercial 'Do-It-For-Me' ("DIFM") Expertise and Unparalleled Footprint
- **Scaled Leadership Position in Large, Highly Fragmented Markets** With Non-Discretionary Demand Drivers

- **Investments in Commercial Excellence** and Expansion of Private Label Across New and Existing Markets
- **Technology and Supply Chain Investments** Expected to Reduce Costs and Drive Operational Efficiencies

- **Targeting to Maintain Investment-Grade Credit Metrics**, With a Tailored Capital Structure Designed to Support Investment Priorities
- **Prioritizing Organic Investments and Accretive Bolt-on Acquisitions** With a **Balanced Capital Return Program**

Scaled Financial Profiles

Market-Leading Strategic Positions

Compelling Growth Strategies

Focused Capital Structures & Financial Policies

Global Industrial

MOTION

$8.9B FY'25 Sales

$1.1B FY'25 EBITDA[1]

- A **Diversified, Best-in-Class** Industrial Parts and Solutions Provider
- Premier Strategic Partner in a **Large, Highly Fragmented ~$150B Total Addressable Market ("TAM")**
- **Largest National Provider** of Value-Added Solutions

- **Strengthen Core Market Presence** and Pursue Leadership Across High-Growth Segments and Value-Added Solutions
- **Consolidation Leader** Across a Highly Fragmented Industrial Distribution Landscape

- **Targeting to Maintain Investment-Grade Credit Metrics**, With Capital Allocation Prioritizing Investments in the Customer Experience
- Motion will Continue to **Pursue Strategic Acquisitions** and a **Balanced Capital Return Program**

GPC

… With Attractive Business Strategies, Capital Priorities and Value Drivers

[1] See Appendix

The Largest Global Automotive Aftermarket Solutions Provider…

Global Automotive

NAPA

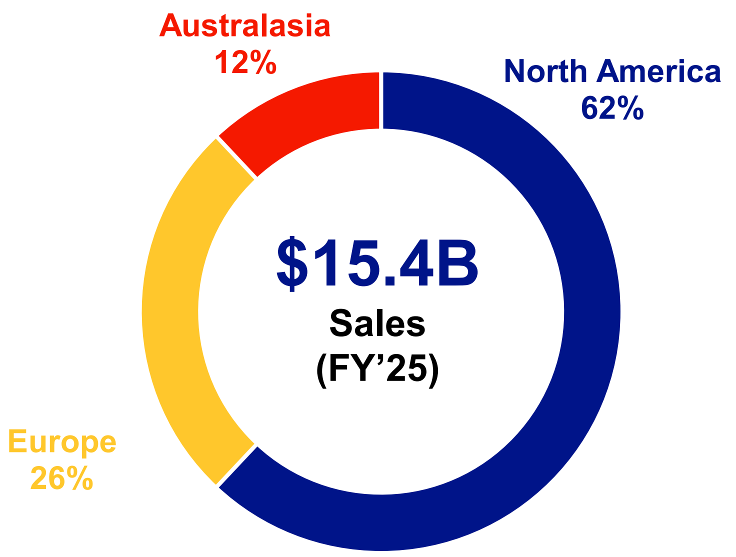
1. **Largest Global Network of Automotive Parts and Auto Care Repair Centers** Spanning North America, Europe, U.K. and Australasia
2. Leading Presence in **Resilient and Growing Commercial 'Do-It-For-Me' (DIFM) Markets**
3. **Iconic Brands With Century-Long Legacies** of Customer Loyalty and Trusted Quality
4. Global Business Benefits From **Scale, Distribution Footprint, Centralized Operations, Strategic Sourcing and Shared Expertise**
5. Ongoing **Technology and Supply Chain Transformation Initiatives** Expected to Deliver **Growth, Margin Expansion and Higher Returns**
6. Expects to **Complement Its Strategic Investments With a Balanced Capital Return Program**

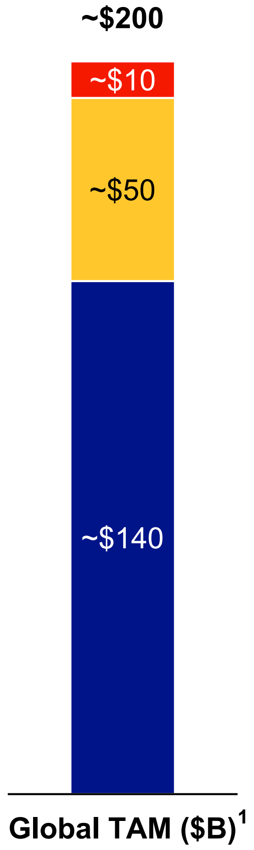
… With Leading DIFM Expertise and Unparalleled Footprint

Global Automotive "At a Glance" (1 of 2)

Strategic Global Position

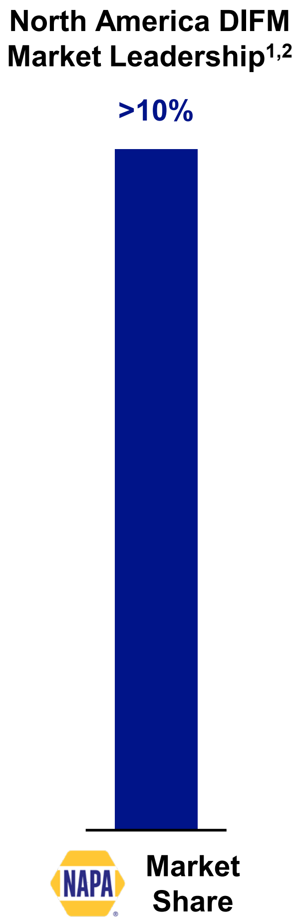
Across Attractive Geographies With Significant TAMs

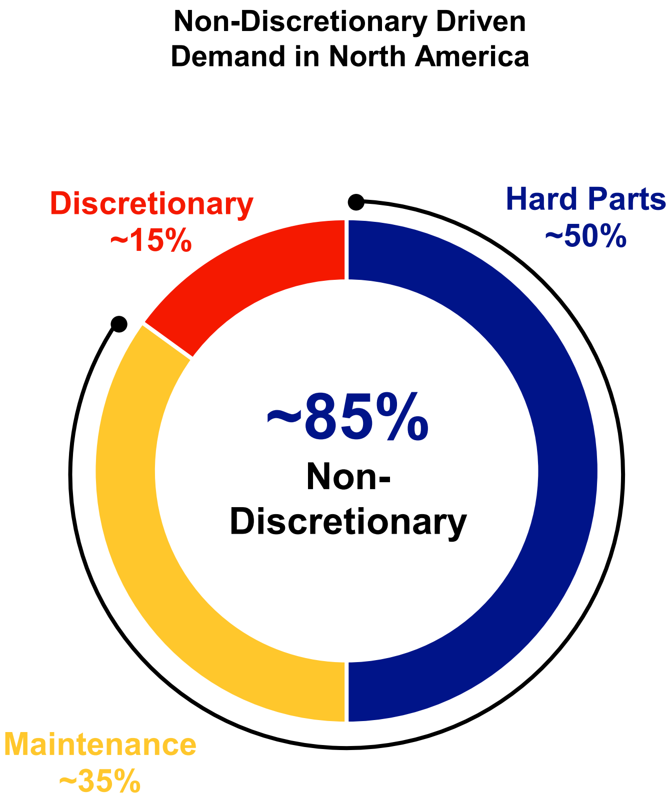




North America DIFM Leader

Serving Non-Discretionary Vehicle Maintenance Demand





Size, Scale, End Markets, Geographies, Brands and Investments for the Future

[1] Company estimate; [2] Based on North America sales from both company-owned and independently-owned locations

Global Automotive "At a Glance" (2 of 2)

Scaled Global Leader
With Unmatched Reach

6,800+
North American Locations


2,600+
European Locations

570+
Australasian Locations

20,000+
Repair Center Partnerships

Growth and Margin Expansion Opportunity
Balanced Operational Initiatives and Levers to Unlock Growth and Margin Expansion

Sales Effectiveness

Gross Margin Initiatives

SG&A Productivity

More Details to Come at Global Automotive Investor Day in 2H'26

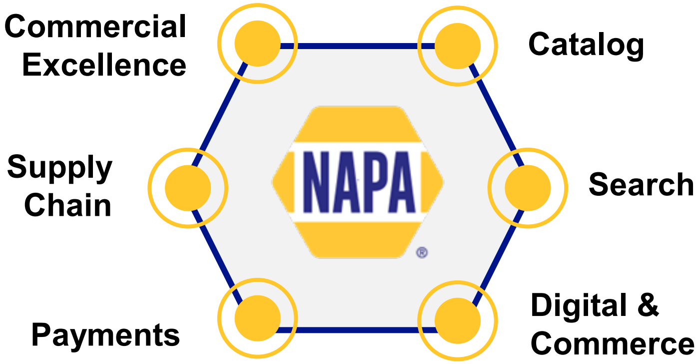
Fit-for-Purpose Business Models
Tailored to Diverse Markets and Needs

Company-Owned Stores

Independent Store Owners

- ✓ Scale and density paired with local market knowledge
- ✓ Capital-efficient model via independent stores
- ✓ Diverse network and footprint leveraging inventory availability and delivery speed
- ✓ Centralized operational framework and brand usage

Strategic Investments Have Laid the Foundation
for Years of Growth Ahead



Size, Scale, End Markets, Geographies, Brands and Investments for the Future

A Diversified, Best-in-Class Industrial Solutions Provider…

Global Industrial

MOTION

1. Leading Industrial Distributor With the **Largest Offering of Mission Critical Industrial Maintenance and Repair ("MRO") and Technical, Value-Added Solutions**
2. **Long-Term Secular Tailwinds** of Re-Shoring and Near-Shoring Initiatives, Automation and Robotics, Artificial Intelligence Buildout and Scarcity of Skilled Manufacturing Labor
3. Operates ~720 Branches and Service Centers, Providing **Comprehensive Coverage and Localized Fulfillment Across a Vast Network**
4. Differentiated, **Omni-Channel** Go-to-Market Strategy and **Strategic Supplier Relationship Network**
5. Diversified Business Mix of **14 End Markets Across Critical Manufacturing Sectors**
6. Will Continue to Pursue **Strategic Acquisitions and a Balanced Capital Return Program**

GPC

… in a Large, Highly-Fragmented Market, Driven by Non-Discretionary Spending

Global Industrial "At a Glance" (1 of 2)

Positioned to Benefit from
Durable, Long-Term Secular Tailwinds

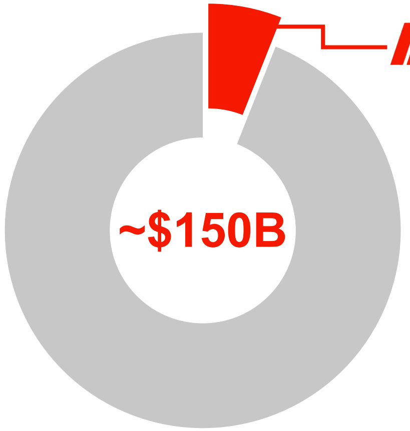
Capital Deployment Into **Advanced Automation and Robotics Solutions**

Scarcity of **Specialized Technical Labor**

Emerging **Data Center Infrastructure** Opportunity

Re-Shoring and Near-Shoring Initiatives
Boosting Domestic Manufacturing

Large and Highly Fragmented TAM
with Significant Consolidation Runway



MiMOTION
SHARE:
~6%

Diverse Portfolio of End Markets[1]
With Further Opportunities to Expand Customer Base

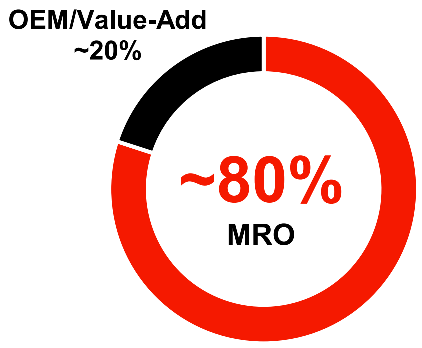
Equipment & Machinery	Food Products	Pulp & Paper
Iron & Steel	Automotive	Chemicals
Aggregate & Cement	Mining	Lumber & Wood

Leading Distribution Strength and Differentiated Value-Added Solutions

[1] Represents 9 of 14 end markets in North America

Global Industrial "At a Glance" (2 of 2)

Mission-Critical Channel Partner
for Both Suppliers and Customers

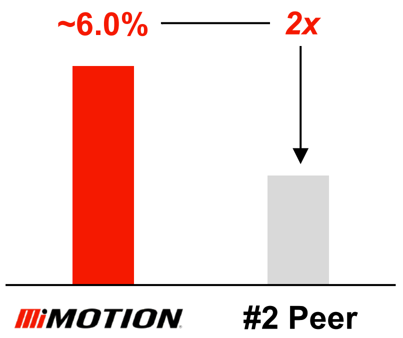


~720
Branches & Service Centers

180,000+
Customers

Undisputed Market Leader
With Double the Scale of the Rest of the Market

Estimated Share of ~$150B Market



#1 in Motion Control

#1 in Fluid Power

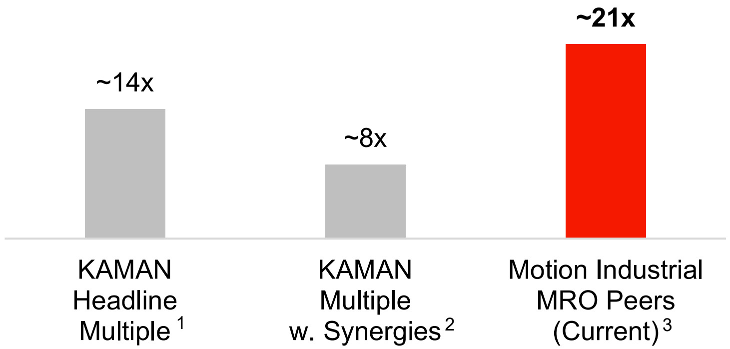
#1 in Automation

Deep Technical Expertise
and Value-Added Solutions

Automation	Conveyance	Fluid Power
Repair & Services	Motion Control	Energy Services
Safety Services	Onsite Solutions	Training

Proven Ability to Consolidate
Case Study: 2022 KAMAN Distribution Group Acquisition

EV / NTM EBITDA Multiple



Leveraging Scale Benefits

- ✓ National footprint with advantaged cost to serve
- ✓ Scale affords cost of capital advantage for inventory / sourcing
- ✓ Acquisition broadens technical capabilities and category breadth

Leading Distribution Strength and Differentiated Value-Added Solutions

[1] Represents EV / FY2022 multiple for KAMAN; [2] Synergies based on realized synergies; [3] Represents average multiple of W.W. Grainger, Fastenal Company, Applied Industrial Technology

The Transaction has Limited Operational Complexity…

- ✓ **Customer Facing Roles and Relationships are Independent and Geography Specific**
- ✓ **Operational Locations and Distribution Centers are Independent and Geography Specific**
- ✓ **Overlapping Direct Suppliers are Limited and Manageable** Given Strategic and Long-Standing Relationships
- ✓ Existing **Cloud IT Infrastructure Allows for an Easier Separation**
- ✓ Certain **Indirect Sourcing and Back-Office Processes (A/P, A/R, Employee Service Center) are Shared** With a **Path to Establishing Independent Operations and Vendor Arrangements**
- ✓ **Transition Services Agreements will be in Place**, as Needed, to Support Both Organizations and Minimize Disruption
- ✓ **Dis-Synergies Expected to be Manageable** With Opportunities to Mitigate a Substantial Portion in the Medium-Term

GPC

… and Manageable Dis-Synergies

Work to Execute the Transaction is Underway…

Structure	Process	Next Steps
✓ Intended to Qualify as a **Tax-Free Transaction for U.S. Federal Tax Purposes**	✓ Targeting to be **Completed in the First Quarter of 2027**	✓ **Leadership and Board Planning** Ongoing
✓ Both Companies to **Design Capital Structures Aligned With Specific Business Objectives,** With Each **Targeting Investment-Grade Credit Metrics**	✓ **Proceed With SEC Regulatory Requirements**	✓ Continue to **Advance Separation Planning and Execution** via Project Management Office
	✓ Subject to Customary Conditions Including **Form 10** Registration, **Receipt of Tax Opinion** and **Final BOD Approval**	✓ Finalize **Capital Structures, Financings and Capital Return** Strategies
	✓ **Investor Days for Global Automotive and Global Industrial to be Held** Prior to Separation	✓ **Progress Updates to be Provided as Planning Continues**

… and is Targeting to be Finalized in the First Quarter of 2027 Subject to Customary Conditions

GPC is Executing a Proactive Strategy…

- ✓ GPC Made Meaningful **Progress Over Past 10 Years to Transform and Create Leading Distribution Platforms in Global Automotive and Global Industrial**
- ✓ Today, **Both Companies are Scaled With Leadership Positions in Large and Fragmented Markets with Non-Discretionary Demand**
- ✓ **Creating Two Public Companies Unlocks Value and Better Positions Each Company to Execute its Strategy**
  - Global Automotive: Operational initiatives to unlock growth acceleration and margin expansion
  - Global Industrial: Expanding market leadership position through accretive organic and inorganic investments
- ✓ The **Business Strategies and Investment Priorities are Defined and Each Offer a Compelling Long-Term Investment Opportunity** for Shareholders
- ✓ The **Transaction is Expected to Have Limited Operational Entanglement and Manageable Dis-Synergies**
- ✓ Work to Execute **the Transaction is In-Flight and Targeting to be Finalized in the First Quarter of 2027,** Subject to Customary Conditions

… to Unlock Shareholder Value and Position Leading Platforms for Future Success

Appendix

Reconciliation of Non-GAAP Financial Measures

Reconciliation of Net Income to Adj EBITDA

	2015	2025
(in thousands)	Full Year	Full Year
GAAP net income	$ 705,672	$ 65,945
Depreciation and amortization	141,675	538,023
Interest expense, net	21,662	163,506
Income taxes (benefit)	418,009	(13,777)
EBITDA:	$ 1,287,018	$ 753,697
Restructuring and other costs	—	253,961
Acquisition and integration related costs and other	—	14,035
Inventory rebranding strategic initiative	—	—
Asbestos-related product liability	—	103,352
Pension settlement	—	741,967
First Brands credit loss allowance	—	150,500
Retirement obligation and other	—	(11,910)
Adjusted EBITDA	$ 1,287,018	$ 2,005,602

Reconciliation of Non-GAAP Financial Measures

Reconciliation of EBITDA to Net Income (Loss)

	2025	2025				2024			
(in thousands)	Full Year	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Net sales:									
North America Automotive	$ 9,520,042	$ 2,264,781	$ 2,444,377	$ 2,484,591	$ 2,326,293	$ 2,196,890	$ 2,352,254	$ 2,390,463	$ 2,272,631
International Automotive	5,858,566	1,400,107	1,467,904	1,505,197	1,485,358	1,377,130	1,374,737	1,409,326	1,395,702
Industrial	8,921,533	2,201,181	2,252,144	2,270,444	2,197,764	2,209,611	2,235,576	2,170,409	2,101,840
Segment EBITDA:									
North America Automotive	672,182	146,995	196,500	199,626	129,061	152,368	215,290	197,873	149,999
International Automotive	544,173	138,512	141,492	135,078	129,091	167,308	147,579	118,269	134,845
Industrial	1,146,422	278,711	288,138	285,015	294,558	278,987	284,960	267,287	270,954
Corporate EBITDA	(357,175)	(91,125)	(78,632)	(93,374)	(94,044)	(82,140)	(78,480)	(106,686)	(121,911)
Interest expense, net	(163,506)	(37,216)	(40,211)	(40,342)	(45,737)	(17,690)	(21,921)	(27,818)	(29,398)
Depreciation and amortization	(538,023)	(115,435)	(123,018)	(127,475)	(172,095)	(90,610)	(99,202)	(106,036)	(112,130)
Other unallocated costs	(1,251,905)	(68,805)	(45,712)	(66,835)	(1,070,553)	(83,042)	(62,025)	(45,296)	(125,366)
Income (loss) before income taxes	52,168	251,637	338,557	291,693	(829,719)	325,181	386,201	297,593	166,993
Income taxes benefit (expense)	13,777	(57,245)	(83,677)	(65,522)	220,221	(76,287)	(90,657)	(71,011)	(33,937)
Net income (loss)	$ 65,945	$ 194,392	$ 254,880	$ 226,171	$ (609,498)	$ 248,894	$ 295,544	$ 226,582	$ 133,056
Segment EBITDA margin:									
North America Automotive	7.1%	6.5%	8.0%	8.0%	5.5%	6.9%	9.2%	8.3%	6.6%
International Automotive	9.3%	9.9%	9.6%	9.0%	8.7%	12.1%	10.7%	8.4%	9.7%
Industrial	12.9%	12.7%	12.8%	12.6%	13.4%	12.6%	12.7%	12.3%	12.9%
Total adj EBITDA margin	8.3%	8.1%	8.9%	8.4%	7.6%	8.9%	9.5%	8.0%	7.5%