

The 1–Minute Brief

# STMicroelectronics

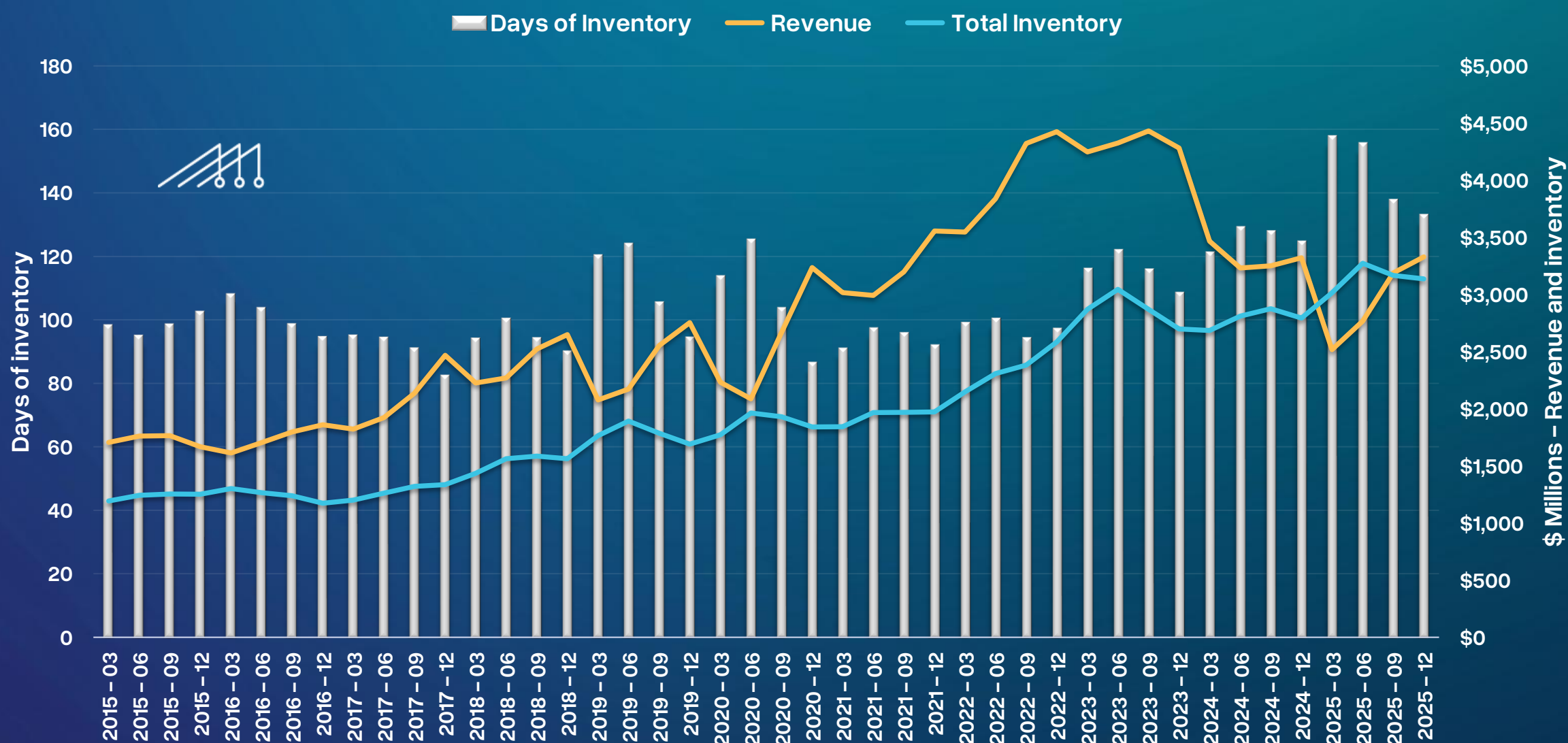
## Q4'25 & FY 2025

### Earnings

Announced on 29, Jan'26

# Key Takeaways

- FY25 revenue was \$11.8B, down 11% YoY, while Q4'25 revenue was \$3.3B, up 0.2% YoY and 4.5% QoQ, driven by growth in Personal Electronics and Industrial
- Total Inventory and DOI declined in Q4'25 as inventory normalized
- FY25 gross margin declined due to under-utilization and pricing/mix, while Q4'25 gross margin rose sequentially on favorable product mix



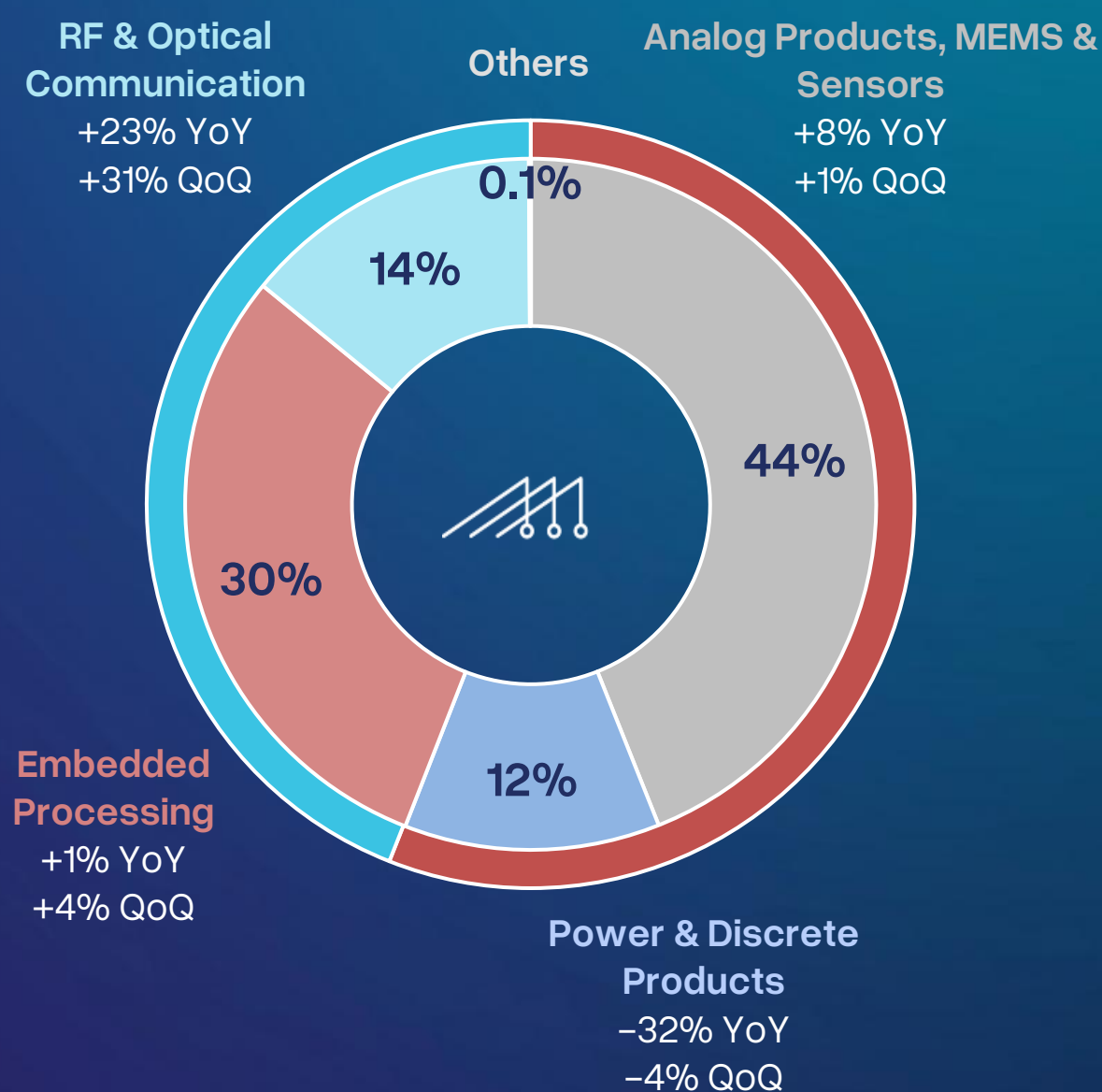
Gross Margin Trend



## Q4'25 Performance Breakdown

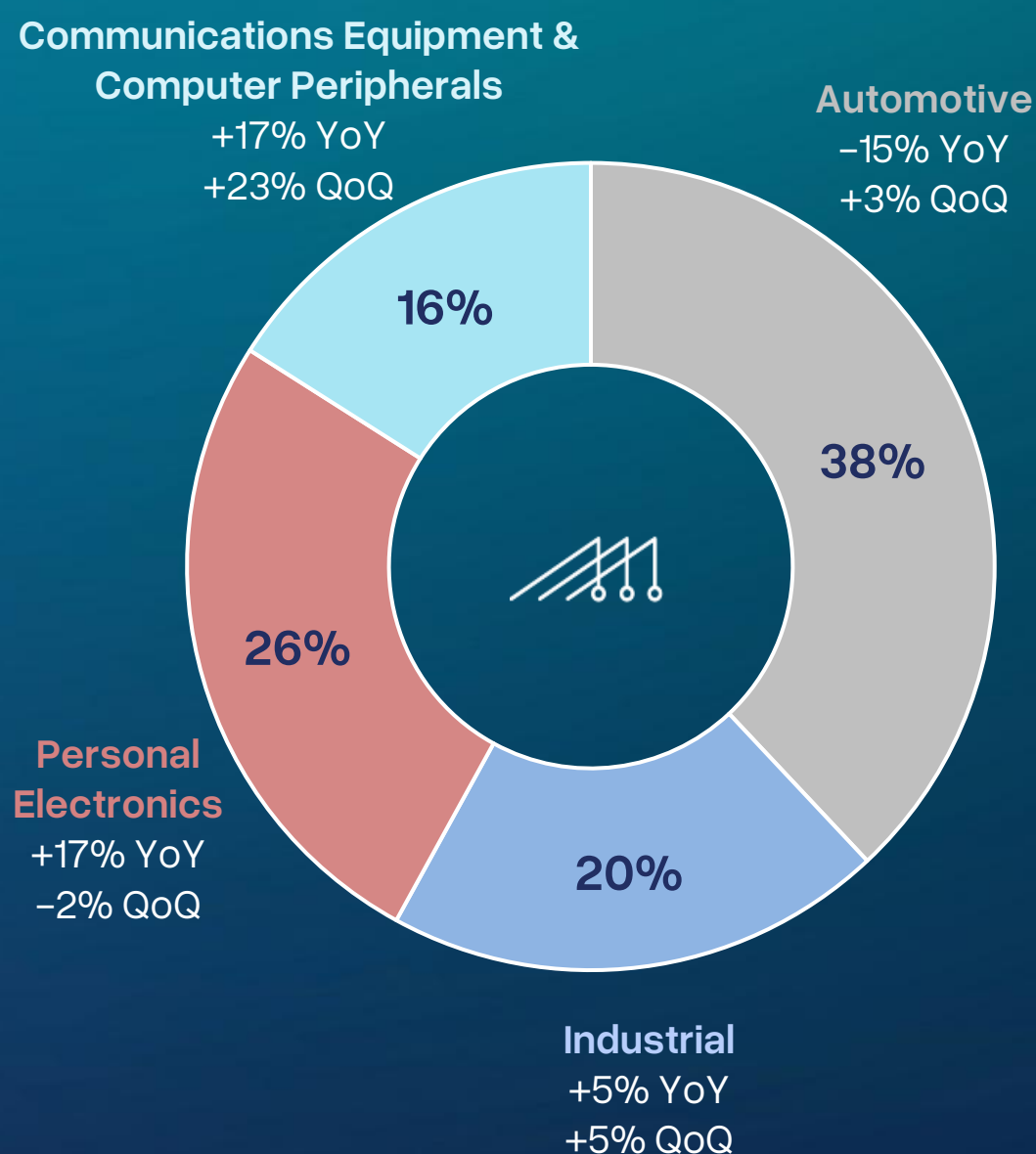
- **Automotive:** Despite YoY decline, sequential growth driven by design wins across EV and traditional domains, supported by OEM/Tier1 partnerships
- **Industrial:** Growth supported by normalized distribution inventories, strong design wins across automation, robotics, power, healthcare, and appliances
- **Personal Electronics:** QoQ down due to seasonality, while strengthening positions in mobile platforms and connected consumer devices
- **Comms Equipment & Computer Peripherals:** Sequential growth driven by AI/data center and optical demand

### Q4'25 % by Product Segment



- Analog, Power & Discrete, MEMS and Sensors (APMS)
- Microcontrollers, Digital ICs, and RF products (MDRF)

### Q4'25 % by End Market



# Outlook

- **Q1'26 quarter midpoint guidance:**  
+20.8% YoY (vs. Q1'25) and -8.7% QoQ (vs. Q4'25)
- Gross margin expected to bottom in Q1'26, about 33.7% and improve through the year

## 2026 Outlook:

- **Automotive & Industrial:** ADAS momentum, SiC power recovery, strong sensors demand, and MCU share gains drive multi-year growth
- **Personal Electronics:** Higher silicon content and engaged customer programs support sustained growth from 2026 onward
- **Comm, Computing & Peripherals:** AI data centers, cloud optical interconnect, and LEO satellites scale revenues to \$500M in 2026 and \$1B before 2030
- **Emerging:** Humanoid robotics adds long-term upside with a ~\$600 addressable BOM per system





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