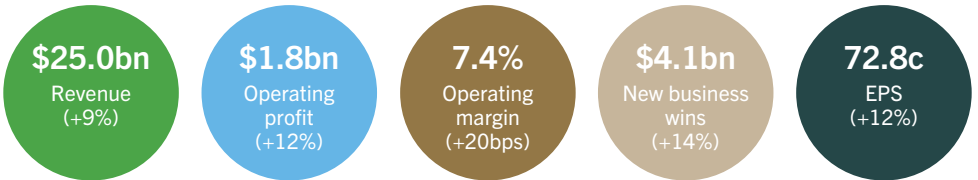


# A global leader in food services

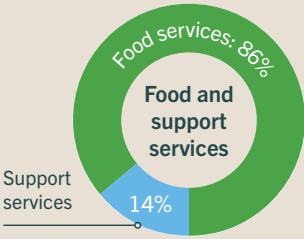
## Half Year 2026 Financial Highlights



We have a diverse portfolio of brands operating under five specialised sectors, allowing us to provide bespoke client offers

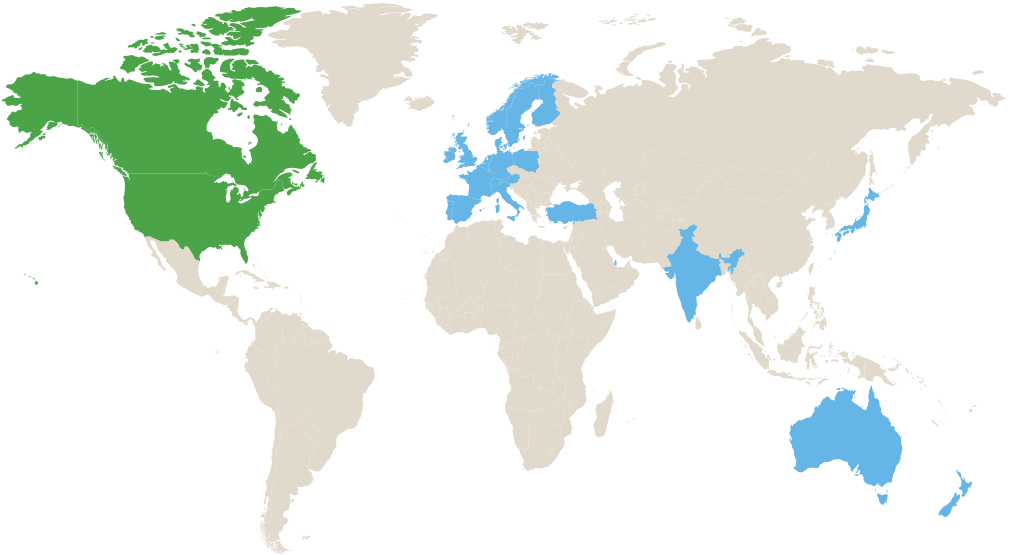


# We operate in over 25 countries in North America, Europe and Asia-Pacific



**Over 590,000**  
people employed  
(as of FY25)

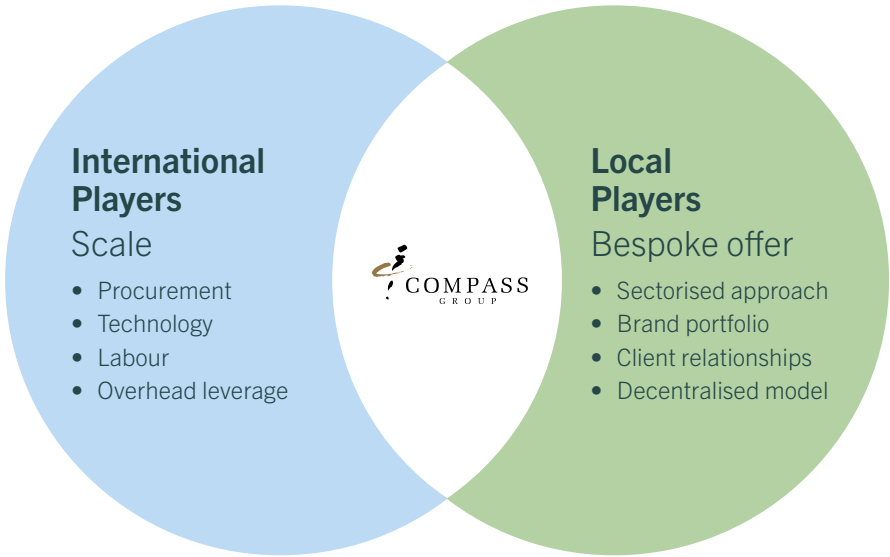
## Where we operate



North America	
Revenue	Underlying operating margin
\$16.7bn	8.4%
67% of Group revenue	

International	
Revenue	Underlying operating margin
\$8.3bn	6.1%
33% of Group revenue	

# We combine the best of both worlds: Local offers with scale



## Sector specialists

Each sector requires a unique approach to meet evolving client needs

### Business & Industry

- A long tail of local competitors
- Digital solutions, talent retention and focus on core business

### Healthcare & Senior Living

- Strong first-time outsourcing (FTO) opportunity
- Regulation, quality of care, cost pressures and staff shortages

### Education

- Mix of global, local, and self-operated
- Regulation, health and safety, differentiated proposition

### Sports & Leisure

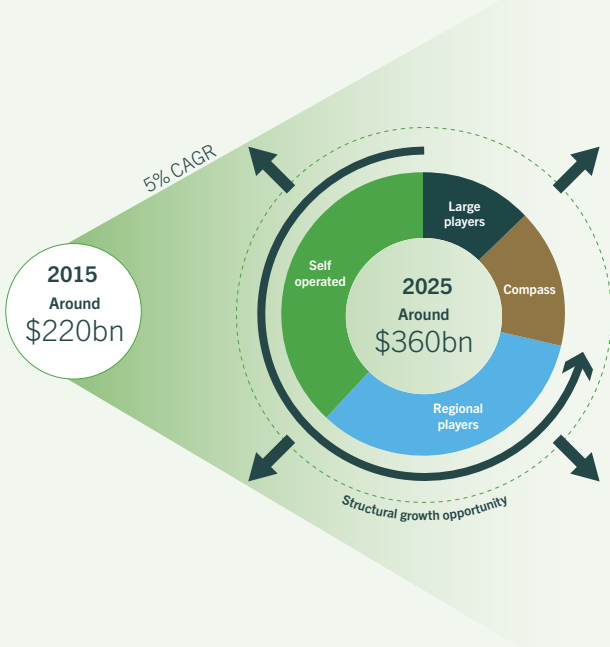
- Large proportion of first-time outsourcing
- Data and speed of service, brand impact and guest experience

### Defence, Offshore & Remote

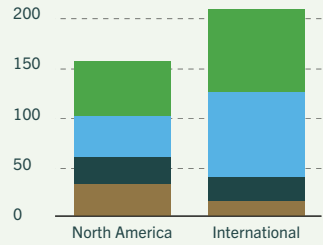
- Small number of operators
- Safety and continuity of service in remote and high-risk environments

# A significant and expanding market opportunity

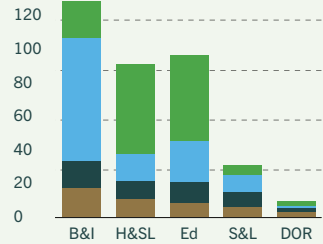
Our addressable market is growing at around 5% per annum and is now approximately \$360 billion, of which Compass has less than 15% market share



Food services market by region (\$bn)



Food services market by sector (\$bn)



## Our unique business model offers distinct competitive advantages



### People and culture

Energetic, ambitious and dedicated, our people are the heart of our business.



### Sectors and brands

Operating across five distinct sectors, our unique brand portfolio allows us to get closer to our clients and customers.



### Culinary and digital innovation

Greater choice, award-winning innovation and market-leading contemporary food offers.



### Procurement

Our scale enables us to offer better quality products at more attractive prices.



### Decentralised structure

An entrepreneurial approach empowers our local management teams to deliver bespoke solutions for our clients.



### Financial strength

Our strong balance sheet enables us to invest in growth, and our resilient operating model attracts new clients seeking stability.

# A strong track record of managing inflation

Based on our ability to mitigate costs and price appropriately

## 1. Start with mitigation

- Menu flexibility
- Operational changes
- Foodbuy scale
- Utilise data and tech

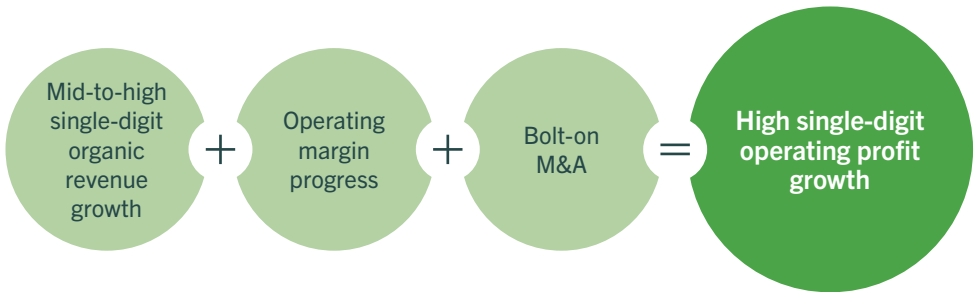
## 2. Contractual pricing

- 1/3 P&L & 1/3 Cost Plus: dynamic pricing
- 1/3 Fixed price: increased cadence
- Indexation clauses for food and labour

## 3. Value vs street pricing

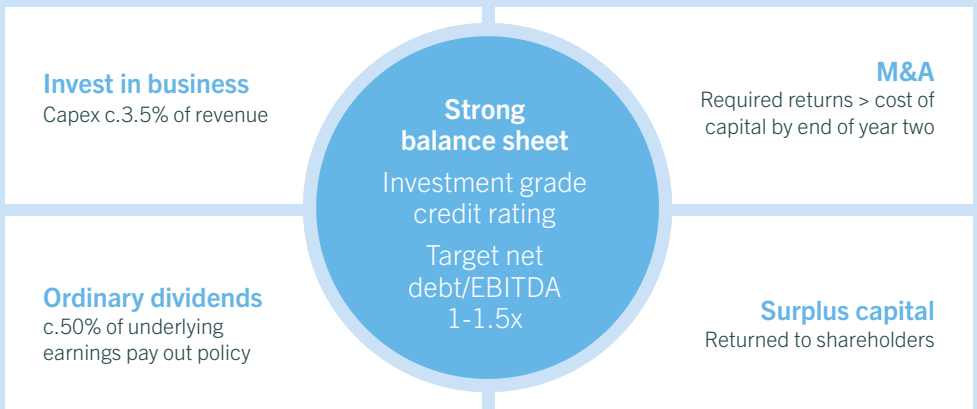
- Not liable for rent, rates or utilities
- Client subsidies
- Importance of food and collaboration

## A proven growth algorithm delivering long-term shareholder returns



## A clear and disciplined approach to capital allocation

Our capital allocation model remains unchanged



# Performance

## Geographic financials by region

<b>HY 2026 (\$m)</b>	<b>North America</b>	<b>International</b>	<b>Other<sup>1</sup></b>	<b>Total</b>
Revenue	16,719	8,264		24,983
Organic growth	7.2%	7.1%		7.2%
Operating profit	1,411	504	(76)	1,839
Margin	8.4%	6.1%		7.4%

<b>HY 2025 (\$m)</b>	<b>North America</b>	<b>International</b>	<b>Other<sup>1</sup></b>	<b>Total</b>
Revenue	15,444	7,124		22,568
Organic growth	8.6%	8.2%		8.5%
Operating profit	1,289	416	(78)	1,627
Margin	8.3%	5.8%		7.2%

1. Other operating profit represents unallocated overheads.

## Geographic financials by sector

<b>HY 2026</b>	<b>North America</b>	<b>International</b>
Business & Industry	36%	46%
Healthcare & Senior Living	27%	14%
Education	22%	13%
Sports & Leisure	14%	13%
Defence, Offshore & Remote	1%	14%
<b>Total</b>	<b>100%</b>	<b>100%</b>

**Note:**

Based on underlying performance at reported exchange rates unless indicated otherwise.

## Underlying cash flow

<b>\$m</b>	<b>HY26</b>
<b>Operating profit</b>	<b>1,839</b>
Depreciation and amortisation	751
<b>EBITDA</b>	<b>2,590</b>
Net capital expenditure	(838)
Trade working capital	(331)
Lease payments of principal	(161)
Other	64
<b>Operating cash flow</b>	<b>1,324</b>
Net interest	(126)
Net tax	(383)
Other	10
<b>Free cash flow</b>	<b>825</b>

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Compass Group stock tickers

LSE: CPG; OTCQX: CMPGY