

A global leader in food services

Half Year 2026 Financial Highlights

$25.0bn Revenue (+9%)

$1.8bn Operating profit (+12%)

7.4% Operating margin (+20bps)

$4.1bn New business wins (+14%)

72.8c EPS (+12%)

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



Defence, Offshore & Remote 5%

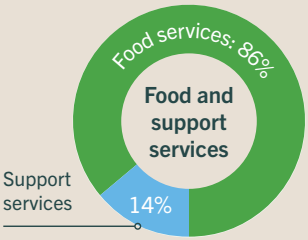
Sports & Leisure 13%

Education 19%

Healthcare & Senior Living 23%

Business & Industry 40%

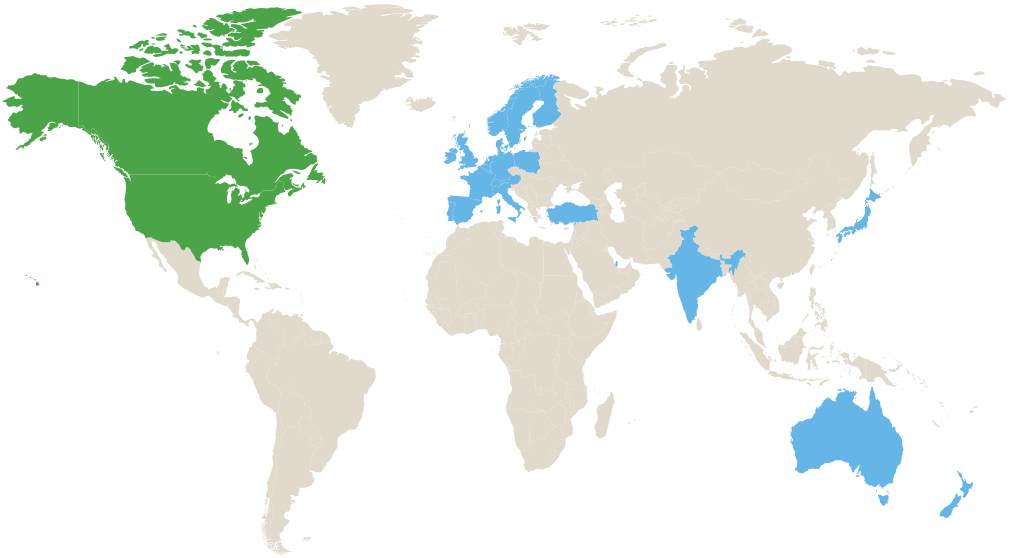
We operate in over 25 countries in North America, Europe and Asia-Pacific





Over 590,000
people employed
(as of FY25)

Where we operate



North America

Revenue
$16.7bn

Underlying operating margin
8.4%

67% of Group revenue

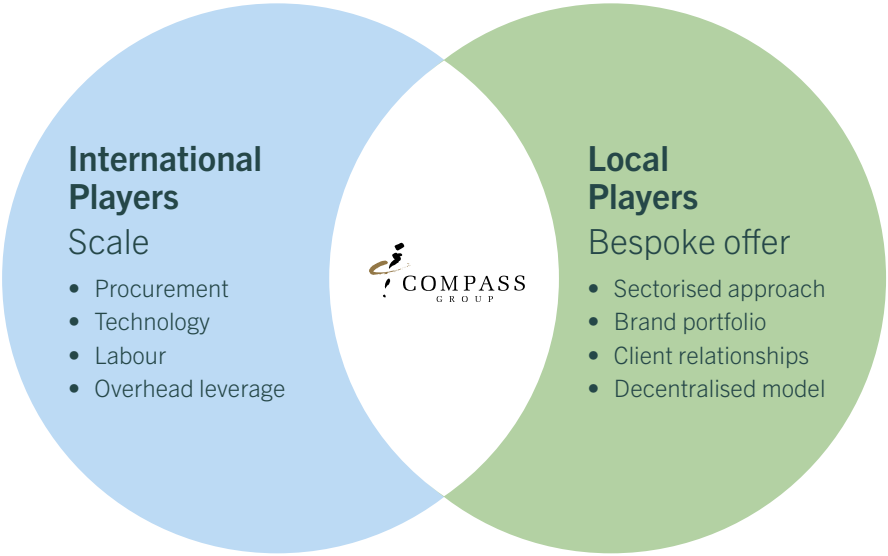
International

Revenue
$8.3bn

Underlying operating margin
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

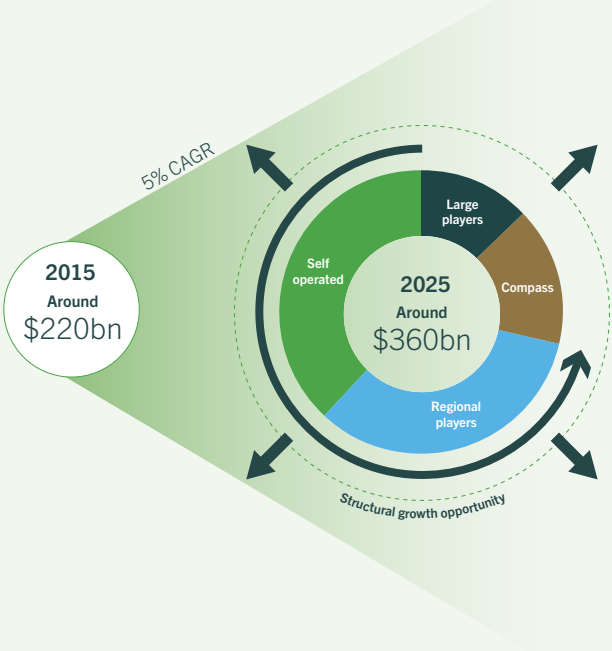
- Large proportion of first-time outsourcing
- Data and speed of service, brand impact and guest experience

Defence, Offshore & Remote

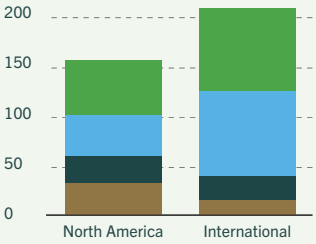
- Small number of operators
- Safety and continuity of service in remote and high-risk environments

A significant and expanding market opportunity

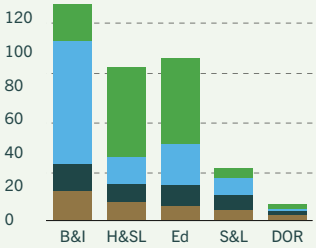
Our addressable market is growing at around 5% per annum and is now approximately $360 billion, of which Compass has less than 15% market share



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

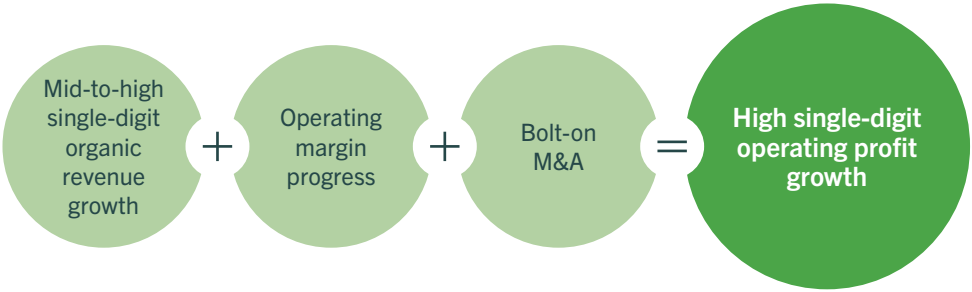
Our strong balance sheet enables us to invest in growth, and our resilient operating model attracts new clients seeking stability.

A strong track record of managing inflation

Based on our ability to mitigate costs and price appropriately

1. Start with mitigation	2. Contractual pricing	3. Value vs street pricing
• Menu flexibility • Operational changes • Foodbuy scale • Utilise data and tech	• 1/3 P&L & 1/3 Cost Plus: dynamic pricing • 1/3 Fixed price: increased cadence • Indexation clauses for food and labour	• 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

HY 2026 ($m)	North America	International	Other[1]	Total
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%*

HY 2025 ($m)	North America	International	Other[1]	Total
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

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

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

Underlying cash flow

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

Contact information

Head of Investor Relations
Agatha.Donnelly@compass-group.com

Investor Relations Director
Simon.Bielecki@compass-group.com

Corporate Access
Dana.Diver@compass-usa.com

Investor Relations
Investor.Relations@compass-group.com

Further information

Scan this QR code to view our investor page:
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Compass Group stock tickers
LSE: CPG; OTCQX: CMPGY