

A global leader in food, hospitality and support services

Full Year 2026 Financial Highlights

$50.8bn	$3.7bn	7.4%	$4.4bn	148.0c
Revenue (+9.3%)	Operating profit (+12%)	Operating margin (+20bps)	New business wins (+16%)	EPS (+12%)

Compass Group is a family of brands

We organise our business around five sectors, with specialist teams, each with expert knowledge of their sector and a deep understanding of clients' needs and challenges.



Defence, Offshore & Remote
6%

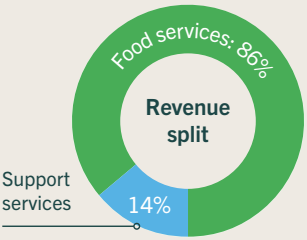
Sports & Leisure
15%

Education
17%

Healthcare & Senior Living
22%

Business & Industry
40%

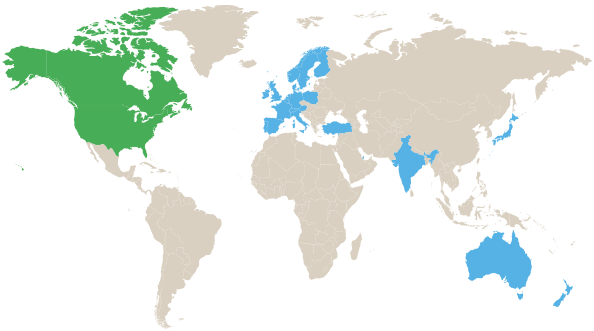
We operate in over 25 countries across North America, Europe and Asia-Pacific





Over 600,000
people employed

Where we operate



North America

Revenue
$34.1bn

Underlying operating margin
8.3%

67% of Group revenue

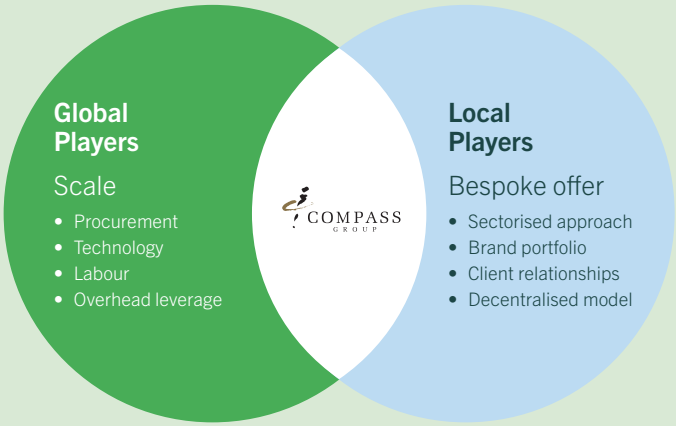
International

Revenue
$16.8bn

Underlying operating margin
6.4%

33% of Group revenue

We combine the best of both: Local offers with global scale



Our clients' complexities are increasing

And they are looking to Compass Group as a solutions provider

Increasing complexity

- Consumer expectations
- Labour & operations
- Technology & data
- Regulation & sustainability
- Cost pressures

Compass capabilities

- Culinary expertise & innovation
- Digital, data & insight
- Sector & operational expertise
- Procurement & supply chain
- Flexible, integrated solutions

Better outcomes

- Better consumer experience
- Increased participation
- Greater value
- Supply chain resilience
- Simpler, more efficient operations

Deeper client relationships | Broader partnerships | Trusted adviser

A strong track record of managing inflation value v high street pricing

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

Resuming share buyback programme

$8bn returned to shareholders since 2014

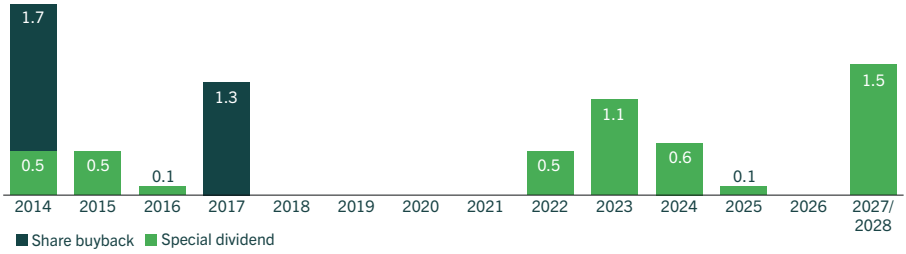
Consistent returns: buybacks & special dividends

Paused: higher M&A, then pandemic

Share buybacks resume

Strategic M&A

Returns resume as M&A moderates



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

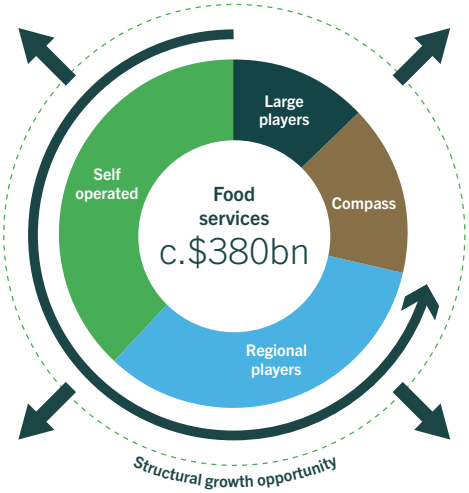
An entrepreneurial approach empowers our local management teams to deliver bespoke solutions for our clients.

Financial strength

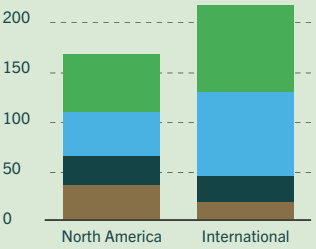
Our strong balance sheet enables us to invest in growth, and our resilient operating model attracts new clients seeking stability.

A significant and expanding market opportunity

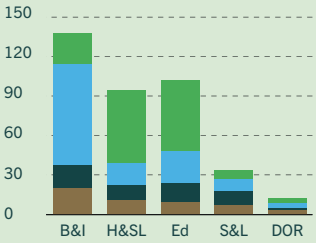
Our addressable market is growing at around 5% per annum and is now approximately $380 billion, of which Compass has around 13% market share



Food services market by region *($bn)*



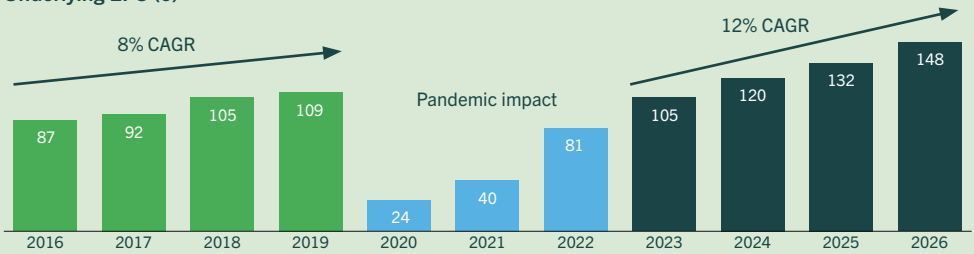
Food services market by sector *($bn)*



Significant improvement in EPS growth

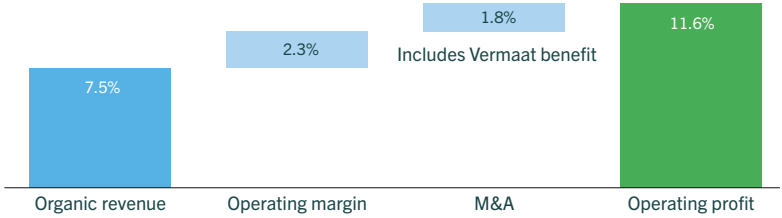
Enhanced by share buybacks

Underlying EPS (c)



Note:
EPS figures are translated at reported rates.

Stepping up our growth algorithm



Now	Mid-to-high single-digit	Ongoing progress	Bolt-on	High single-digit
Historic	4 – 6%	Flat	Bolt-on	Mid single-digit

A clear and disciplined approach to capital allocation

Invest in business
Capex c.3.5% of revenue

Ordinary dividends
c.50% of underlying earnings pay out policy

Strong balance sheet
Investment grade credit rating
Target net debt/EBITDA 1-1.5x

M&A
Required returns > cost of capital by end of year two

Surplus capital
Returned to shareholders

Performance

Geographic financials by region

FY 2026 ($m)	North America	International	Other[1]	Total
Revenue	34,067	16,781		50,848
Organic growth	*7.8%*	*6.8%*		*7.5%*
Operating profit	2,827	1,071	(152)	3,746
Margin	*8.3%*	*6.4%*		*7.4%*

FY 2025 ($m)	North America	International	Other[1]	Total
Revenue	31,398	14,672		46,070
Organic growth	*9.1%*	*7.7%*		*8.7%*
Operating profit	2,582	904	(151)	3,335
Margin	*8.2%*	*6.2%*		*7.2%*

1. Other operating profit represents unallocated overheads.

Geographic financials by sector

FY 2026	North America	International
Business & Industry	38%	46%
Healthcare & Senior Living	26%	14%
Education	20%	12%
Sports & Leisure	15%	14%
Defence, Offshore & Remote	1%	14%
Total	**100%**	**100%**

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

Underlying cash flow

$m	FY26
Operating profit	**3,746**
Depreciation and amortisation	1,539
EBITDA	**5,285**
Net capital expenditure	(1,927)
Trade working capital	7
Lease payments of principal	(333)
Other	45
Operating cash flow	**3,077**
Net interest	(309)
Net tax	(772)
Other	24
Free cash flow	**2,020**

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Compass Group stock tickers
LSE: CPG; OTCQX: CMPGY, CMPGF