cementirholding
CALTAGIRONE GROUP

# 2026 First Half Results

## Conference Call Presentation

ROME, 29 JULY 2026

# Key takeaways

- **Significant improvement in the second quarter despite a first quarter impacted by exceptionally adverse weather conditions.** At constant perimeter, Q2 cement volumes increased by 3.4%, non-GAAP revenue by 5.3% and EBITDA by 12.9%, confirming a positive reversal compared to the weak start of the year

- **Volume declined across all business lines**, with cement -2.9%, ready-mix concrete -10.9%, aggregates -2.6%. **At constant perimeter, excluding the disposal of Kars Cimento, cement volumes increased by 1.4% in H1 2026.** Positive trend in Belgium and Egypt, following the restart of the second kiln

- **Reported performance was affected by foreign exchange headwinds** mainly due to the depreciation of the Turkish lira and the US dollar. The negative impact amounted to 37.4 M€ on non-GAAP revenue and 2.6 M€ on non-GAAP EBITDA

- EBITDA was affected by lower volumes in Nordic & Baltic and Türkiye due to weather conditions, while Egypt, Belgium and North America improved year on year

- **Clear improvement in Q2 2026: No significant direct impact from geopolitical conflicts on operations**; energy cost volatility largely mitigated through a structured risk management approach and hedging, while some pressure persists on petcoke supply and logistics

- **FY 2026 guidance confirmed**, despite the uncertain macroeconomic and geopolitical environment

# 2026 First half results highlights*

**Revenue reached 798.1 M€ (+0.2% yoy); non-GAAP** Revenue reached 793.7 M€ (-1.7% yoy and -0.2% at constant perimeter)**

- 37.4 M€ negative FX impact, mainly due to TRY and USD depreciation
- Cement volumes decreased by 2.9%, due to exceptionally adverse weather conditions in Q1 in Nordic & Baltic and Türkiye. Positive performance in Egypt and Belgium. At constant perimeter volumes were + 1.4%. In Q2 volumes partially recovered
- RMC volumes declined by 10.9% and aggregates volumes -2.6% with weakness in Türkiye and Denmark, partially offset by Sweden, Belgium and new business in the US

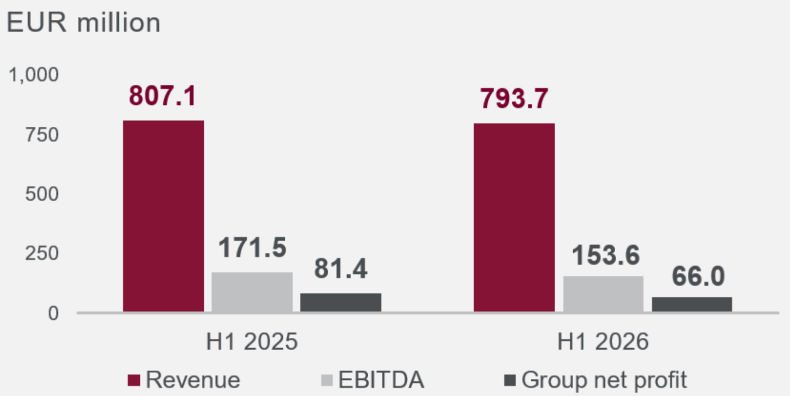
**EBITDA reached 163.9 M€ (-5.5% yoy); non-GAAP* EBITDA: 153.6 M€ (-10.4% yoy and -9.5% at constant perimeter)**

- EBITDA decline mainly driven by Nordic & Baltic and Türkiye (26.6 M€), lower volumes and negative FX impact of 2.6 M€
- Non-GAAP EBITDA Margin at 19.3% (21.2% in H1 2025)

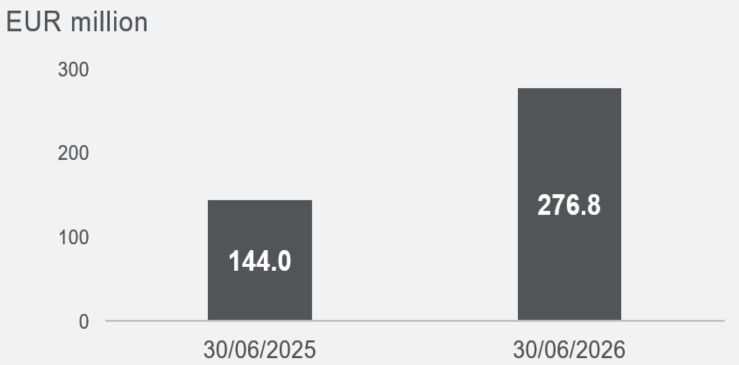
**Group net profit: 62.0 M€ (-15.7% yoy); non-GAAP* Group net profit: 66.0 M€ (-18.9% yoy)**

**Net cash: 276.8 M€**, an improvement of **132.8 M€** year on year, including 51.0 M€ Kars Cimento disposal, 19.7 M€ insurance proceeds, 18.6 M€ Just Transition Fund, and 54.9 M€ of dividend distribution

## Financial Highlights – Non GAAP**



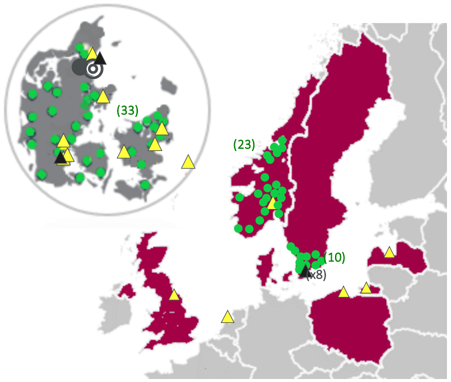

## Net Cash




** 2025 Figures include the contribution of Kars Cimento, which was sold on Dec. 1st, 2025*
*** Non-GAAP figures exclude the impact of hyperinflation and the valuation of non-industrial real estate in Türkiye.*

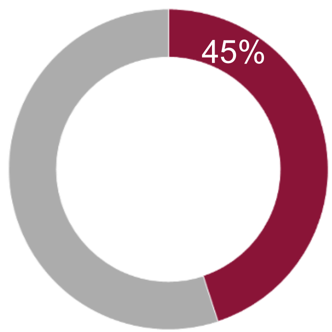
# Nordic & Baltic

## Asset overview




- Grey cement plant (1)
- White cement plant (1)
- RMC (66)
- Terminals (18)
- Quarries (8)

## Share of Group EBITDA




2026 H1 Non-GAAP

| EUR '000 | H1 2026 | H1 2025 | Chg % |
|---|---|---|---|
| Revenue | 321,066 | 316,157 | 1.6% |
| Denmark | 237,519 | 244,698 | (2.9%) |
| Norway / Sweden | 79,717 | 71,146 | 12.0% |
| Others (*) | 39,443 | 39,728 | (0.7%) |
| Eliminations | (35,613) | (39,415) | |
| EBITDA | 68,535 | 82,762 | (17.2%) |
| Denmark | 60,450 | 76,141 | (20.6%) |
| Norway / Sweden | 4,715 | 3,023 | 56.0% |
| Others (*) | 3,370 | 3,598 | (6.3%) |
| *EBITDA Margin %* | *21.3%* | *26.2%* | |

*(*) Others include: Iceland, Poland and white cement sales from Denmark to Belgium and France*

## DENMARK

- Construction market remained weak, especially residential, due to restrictive financing conditions, energy-cost uncertainty and project postponements
- Grey domestic cement volumes **-4%** yoy, impacted by exceptionally harsh winter weather and delays to the Fehmarn project, although deliveries improved during Q2. White cement up **12%,** supported by stronger demand
- Exports **-16%** due to lower deliveries to Norway and Iceland, partially offset by growth in the Poland, France and Finland
- RMC volumes **-11%**, aggregates volumes **-21%**
- EBITDA down **21%** yoy, impacted by lower volumes, higher $CO_2$ taxes, increased variable costs

## NORWAY

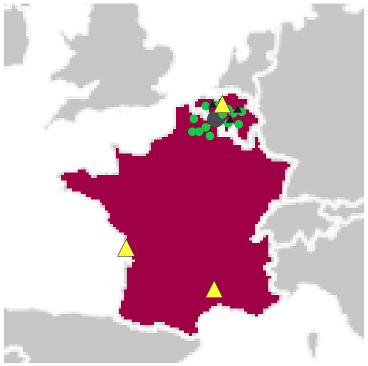
- RMC sales volumes **-5%** due to weak demand, lower activity on major projects and adverse weather. Market with overcapacity and price competition
- EBITDA increased driven by higher prices, partly offset by increased variable costs
- Norwegian Krone appreciated by **4.2%** vs. Euro average

## SWEDEN

- RMC sales volumes up **+10%** driven by the recovery from March, the restart of postponed projects and several new contracts; aggregates volumes up **24%** supported by new projects and temporary closure of a competitor's quarry
- EBITDA increased driven by higher volumes and prices, partly offset by increased variable costs
- Swedish Krona appreciated by **2.8%** vs. Euro average

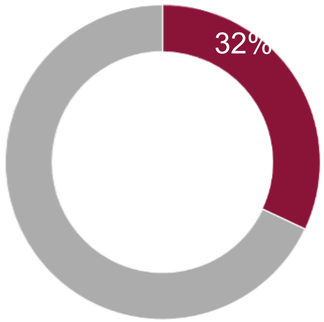
# Belgium and France*

## Asset overview



- Grey cement plant (1)
- RMC (12)
- Terminals (4)
- Quarries (3)

## Share of Group EBITDA




2026 H1 Non-GAAP

| EUR '000 | H1 2026 | H1 2025 | Chg % |
|---|---|---|---|
| Revenue | 173,908 | 164,377 | 5.8% |
| EBITDA | 49,263 | 46,113 | 6.8% |
| *EBITDA Margin %* | *28.3%* | *28.1%* | |

** Includes Compagnie des Ciments Belges S.A. results only*

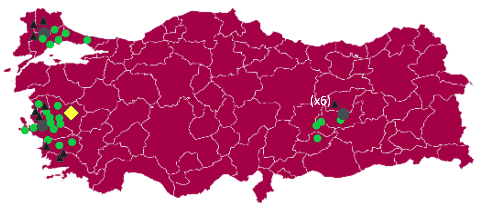
## BELGIUM AND FRANCE

- Domestic cement volumes were up **5%** supported by new customers and a major infrastructure project in the Antwerp area, despite adverse weather in the beginning of the year and unusually high temperatures in the second half of June
- Exports up **17%** to France and Netherlands driven by new customers and a major project in the Antwerp
- RMC volumes declined **6%**, mainly due to weaker performance in Belgium (-10%), affected by adverse weather conditions, Easter-related site shutdowns and a high comparison base in H1 2025. Volumes in France up **+3%**
- Aggregates volumes +**2%,** mainly in France and the Netherlands benefiting from stronger infrastructure and construction activity from March onwards
- EBITDA up **7%** reflecting higher cement volumes and lower raw material and $CO_2$ costs, partly offset by higher costs related to a different maintenance schedule, lower RMC volumes and higher variable costs

Views of the Company's cement plant in Gaurain, Belgium

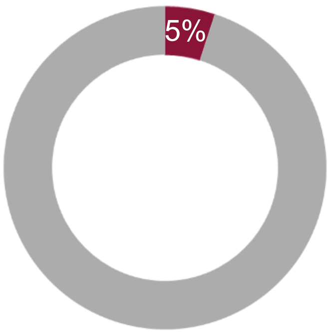
# Türkiye

## Asset overview




Grey cement plant (3)*
RMC (23)
Waste (1)
Quarries (18)

## Share of Group EBITDA




2026 H1 Non-GAAP

| EUR '000 | H1 2026 (Non-GAAP) | H1 2025 (Non-GAAP) | Chg % |
|---|---|---|---|
| Revenue | 133,882 | 165,021 | (18.9%) |
| EBITDA | 7,763 | 20,053 | (61.3%) |
| *EBITDA Margin %* | *5.8%* | *12.2%* | |

*From April 2022 Türkiye is considered "hyperinflationary". Reported figures are non-GAAP i.e. exclude the impacts of hyperinflation and the valuation of non-industrial property*

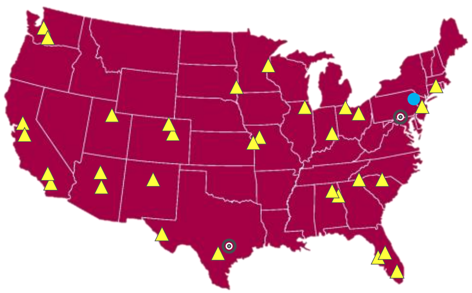
* *Kars was sold on December 1st, 2025*

## TÜRKIYE

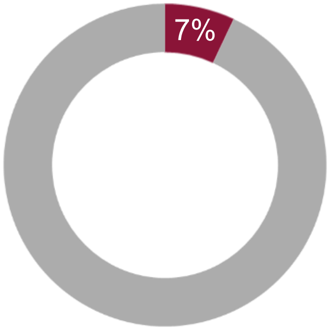
- Challenging operating environment, impacted by hyperinflation, high interest rates, exceptionally adverse weather in Q1 and weaker post-earthquake reconstruction demand
- Domestic cement volumes **-13%** yoy (**-2.2%** excluding the disposal of the Kars plant) affected by adverse weather conditions, gradual completion of major post-earthquake reconstruction projects and mixed regional trends (Aegean +15%, Marmara -2%, Eastern Anatolia -32%)
- Exports **+2%,** supported by deliveries to Mediterranean and Balkan countries
- RMC volumes **-15%** and aggregates volumes **-26%**, due to the slowdown in reconstruction activity, although June showed a strong recovery supported by a major infrastructure project in the Izmir area
- Revenues declined by **-19%** yoy impacted by TRY depreciation
- EBITDA declined reflecting lower volumes and higher variable and fixed costs, only partly offset by price increases
- Divestment of Kars Cimento completed on December 1st, 2025
- **27%** TRY devaluation vs. Euro average

# North America

## Asset overview



## Share of Group EBITDA




2026 H1 Non-GAAP

| EUR '000 | H1 2026 | H1 2025 | Chg % |
|---|---|---|---|
| Revenue | 88,220 | 90,741 | (2.8%) |
| EBITDA | 11,512 | 11,308 | 1.8% |
| *EBITDA Margin %* | *13.0%* | *12.5%* | |

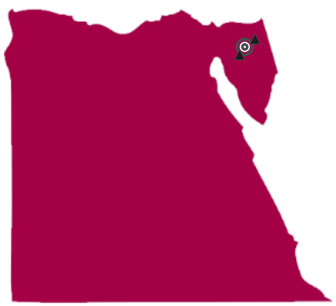
## UNITED STATES

- White cement volume were broadly **stable** yoy, demonstrating resilience despite a generally softer market environment and weak residential demand
- Florida recorded a **+10%** increase driven by demand from key customers
- In Texas volumes were down **-7%** due to a January snowstorm and competitive pressures from imports
- In California volumes were down **-9%** due to intense competition. The York region recorded a slight decline
- EBITDA was up **1.8%** with cement business impacted by higher variable costs, FX effect, only partly compensated by higher selling prices. Precast and aggregate businesses delivered higher EBITDA
- **6.8%** USD depreciated vs. Euro average

Views of the Company's cement plant in York, Pennsylvania

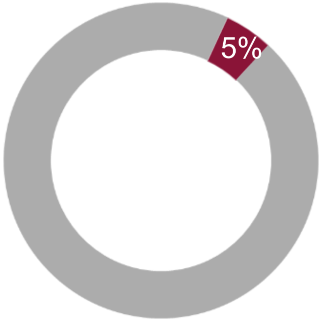
# Egypt

## Asset overview



◎ White cement plants (1)
▲ Quarries (2)

## Share of Group EBITDA




2026 H1 Non-GAAP

| EUR '000 | H1 2026 | H1 2025 | Chg % |
|---|---|---|---|
| Revenue | 32,761 | 20,912 | 56.7% |
| EBITDA | 7,277 | 5,088 | 43.0% |
| *EBITDA Margin %* | *22.2%* | *24.3%* | |

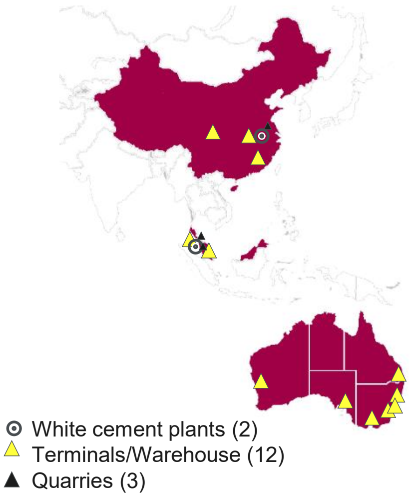
## EGYPT

- Revenues were up ~**57%** despite a **7.3%** depreciation of the Egyptian pound
- Macro context remains challenging with high inflation, currency volatility, rising energy costs
- Domestic cement volumes increased **31%** supported by stronger commercial positioning and market share gains
- Export volumes grew ~**78%**, benefiting from deferred shipments from Dec. 2025 and the resolution of technical issues following the restart of the second production line, particularly supporting sales to the United States.
- EBITDA was up **43%**, driven by higher volumes, and a more favorable geographic mix focused on higher-margin export destinations, more than offsetting higher energy and production costs
- **7.3%** EGP depreciation vs. Euro average

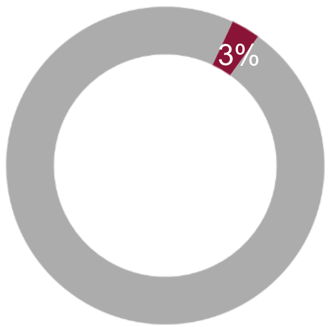

Views of the Company's cement plant at El Arish, Sinai pensinsula

# Asia Pacific

## Asset overview




## Share of Group EBITDA




2026 H1 Non-GAAP

| EUR '000 | H1 2026 | H1 2025 | Chg % |
|---|---|---|---|
| **Revenue** | **46,837** | **47,428** | **(1.2%)** |
| China | 21,005 | 23,482 | (10.5%) |
| Malaysia | 26,001 | 24,016 | 8.3% |
| Eliminations | (169) | (70) | |
| **EBITDA** | **4,378** | **6,858** | **(36.2%)** |
| China | 3,031 | 3,856 | (21.4%) |
| Malaysia | 1,347 | 3,002 | (55.1%) |
| *EBITDA Margin %* | *9.3%* | *14.5%* | |

## CHINA

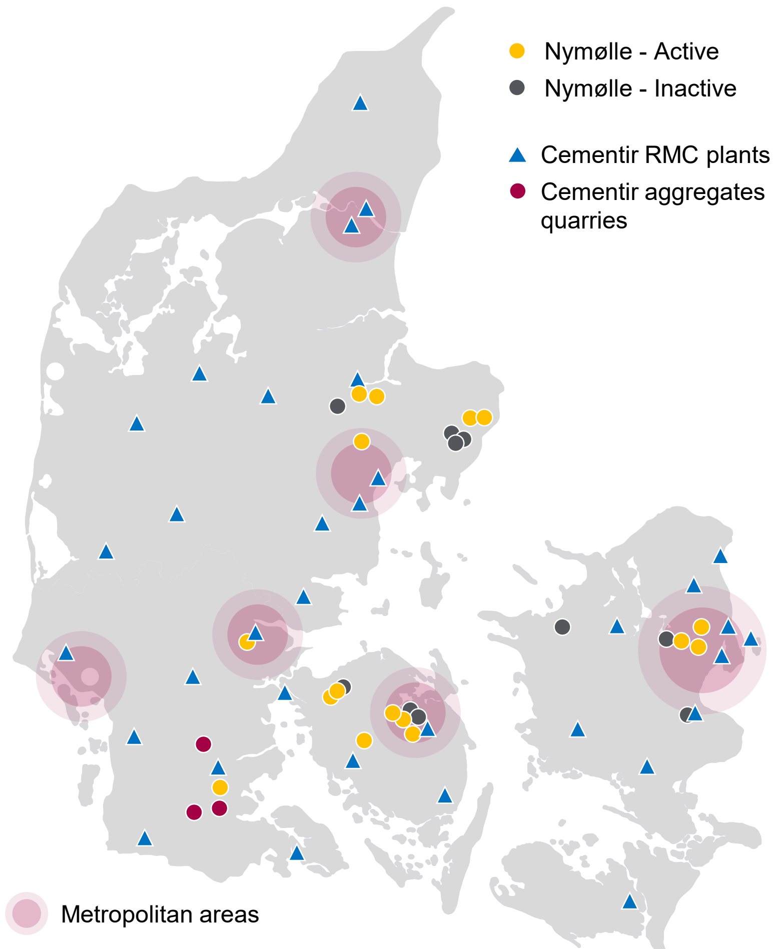
- Volumes **-6%** yoy, impacted by weak domestic demand, intense competition, adverse weather conditions in January, the slowdown around the Chinese New Year
- Market environment remains weak despite government stimulus
- Revenues decreased **-10.5%** yoy, reflecting lower volumes and selling prices
- EBITDA down **-21.4%** yoy, due to lower volumes and prices and higher fixed costs, partly offset by variable cost savings
- **1.1%** CNY depreciation vs. Euro average

## MALAYSIA

- Total volumes increased by ~**2%,** with domestic volumes, though marginal, declined by **11%** due to order timing effect and weaker retail demand following price increases
- Cement exports grew **+14%** supported by higher deliveries to Australia, the Philippines and Vietnam, while clinker exports decreased by 24%, mainly due to shipment timing differences to Australia
- Revenue up by **8.3%** supported by higher export volumes and a more favorable product mix, EBITDA **-55%** due to higher variable and fixed costs, particularly distribution and logistics expenses
- **2.8%** MYR appreciated vs. Euro average

# Nymølle acquisition: expanding in Danish aggregates

A bolt-on acquisition in the aggregates business, enhancing vertical integration and securing a stronger Nordic platform.




## NYMØLLE PROFILE

- The largest aggregates player* in Denmark, with around **10% market share**
- Operates **26 land-based aggregate quarries** across Denmark and holds a well-developed reserve base
- **FY ending April 2026:**
  - Revenues of DKK 230 M — approx. 30 M€
  - Pro-forma EBITDA of DKK 93 M — approx. EUR 12.5 M€

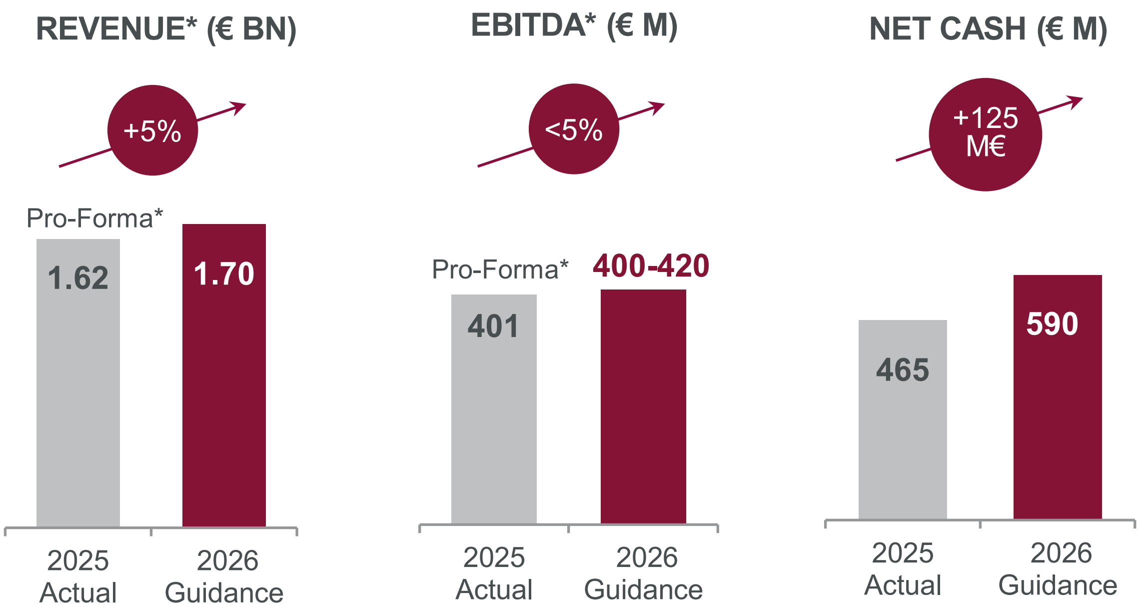
## TRANSACTION HIGHLIGHTS

- On July 1, 2026 completed acquisition of **100% of Nymølle Stenindustrier A/S**
- **Enterprise Value**: DKK 900 M (˜120 M€ on a cash and debt-free basis)
- **Expected synergies** of around DKK 30 M approx. **4 M€** within 24 months, through integration with existing Nordic & Baltic operations

* *Based on capacity*

# 2026 Guidance - confirmed

In light of the results achieved in H1 2026 and despite the uncertain macroeconomic and geopolitical environment we reiterate our full-year guidance




**Revenue ~ 1.7 BN€**

**EBITDA 400 - 420 M€**

**Net cash ~ 590 M€**

**Capex ~ 128 M€**

**Guidance refers to like-for-like ongoing operations, non-GAAP, excluding extraordinary items**

The above guidance excludes the negative repercussions of geopolitical shocks or other extraordinary events. As the expectations described above are based on certain preconditions and assumptions that are beyond management's control, actual results may deviate significantly from such expectations The foregoing exclusively reflects the point of view of the company's management, and does not represent a guarantee, a promise, an operational suggestion or even just an investment advice.

** 2025 pro-forma Revenue and EBITDA, excluding non-recurring items and the contribution of Kars Cimento, which was sold on Dec. 1st, 2025. 2026 figures exclude the contribution from Nymølle, whose acquisition was completed on July 1st, 2026.*

# 02 Appendix

GREEN BELT
BRIDGE, DENMARK

# Appendix – Consolidated Income Statement – H1 2026

| (EUR million) | H1 2026 | H1 2025 | Chg % | H1 2026 (Non-GAAP)* | H1 2025 (Non-GAAP)* | Chg % |
|---|---|---|---|---|---|---|
| **REVENUE FROM SALES AND SERVICES** | **798.1** | **796.7** | **0.2%** | **793.7** | **807.1** | **(1.7%)** |
| Change in inventories | (9.6) | (4.1) | 131.7% | (8.3) | (2.8) | 202.6% |
| Increase for internal work and other income | 24.5 | 13.0 | 88.3% | 9.0 | 4.8 | 85.4% |
| **TOTAL OPERATING REVENUE** | **813.0** | **805.6** | **0.9%** | **794.4** | **809.1** | **(1.8%)** |
| Raw materials costs | (331.2) | (325.8) | 1.7% | (325.3) | (328.3) | (0.9%) |
| Personnel costs | (115.1) | (112.0) | 2.7% | (114.3) | (113.1) | 1.0% |
| Other operating costs | (202.8) | (194.2) | 4.4% | (201.2) | (196.2) | 2.6% |
| **TOTAL OPERATING COSTS** | **(649.1)** | **(632.0)** | **2.7%** | **(640.8)** | **(637.7)** | **0.5%** |
| **EBITDA** | **163.9** | **173.5** | **(5.5%)** | **153.6** | **171.5** | **(10.4%)** |
| *EBITDA Margin %* | *20.5%* | *21.8%* | | *19.3%* | *21.2%* | |
| Amortisation, depreciation, impairment losses and provisions | (72.9) | (71.5) | 2.0% | (68.5) | (66.5) | 3.1% |
| **EBIT** | **91.0** | **102.0** | **(10.8%)** | **85.0** | **105.0** | **(19.0%)** |
| *EBIT Margin %* | *11.4%* | *12.8%* | | *10.7%* | *13.0%* | |
| **NET FINANCIAL INCOME (EXPENSE)** | **(2.1)** | **(1.5)** | **(38.8%)** | **1.6** | **2.7** | **(42.0%)** |
| **PROFIT BEFORE TAXES** | **88.8** | **100.5** | **(11.6%)** | **86.6** | **107.7** | **(19.6%)** |
| *Profit (loss) before taxes Margin %* | *11.1%* | *12.6%* | | *10.9%* | *13.3%* | |
| Income taxes | (27.2) | (26.7) | 1.7% | (21.8) | (26.0) | (16.2%) |
| **PROFIT FROM CONTINUING OPERATIONS** | **61.7** | **73.8** | **(16.4%)** | **64.8** | **81.6** | **(20.7%)** |
| **PROFIT FOR THE YEAR** | **61.7** | **73.8** | **(16.4%)** | **64.8** | **81.6** | **(20.7%)** |
| Non controlling interests | (0.3) | 0.3 | n.m. | (1.3) | 0.2 | n.m. |
| **GROUP NET PROFIT** | **62.0** | **73.5** | **(15.7%)** | **66.0** | **81.4** | **(18.9%)** |

*(*) Non-GAAP figures exclude the impact of hyperinflation and the valuation of non-industrial real estate in Türkiye.*

# Appendix – Consolidated Income Statement – Q2 2026

| (EUR million) | Q2 2026 | Q2 2025 | Chg % | Q2 2026 (Non-GAAP)* | Q2 2025 (Non-GAAP)* | Chg % |
|---|---|---|---|---|---|---|
| **REVENUE FROM SALES AND SERVICES** | **452.2** | **428.6** | **5.5%** | **449.7** | **436.5** | **3.0%** |
| Change in inventories | 2.2 | (1.9) | n.m. | 2.9 | (1.4) | n.m. |
| Increase for internal work and other income | 22.8 | 10.5 | 116.4% | 7.3 | 2.3 | 212.7% |
| **TOTAL OPERATING REVENUE** | **477.2** | **437.2** | **9.1%** | **459.8** | **437.4** | **5.1%** |
| Raw materials costs | (190.3) | (177.6) | 7.1% | (187.1) | (180.8) | 3.5% |
| Personnel costs | (58.0) | (56.1) | 3.4% | (57.5) | (56.9) | 1.1% |
| Other operating costs | (103.8) | (96.4) | 7.7% | (103.0) | (97.9) | 5.2% |
| **TOTAL OPERATING COSTS** | **(352.1)** | **(330.1)** | **6.6%** | **(347.6)** | **(335.6)** | **3.6%** |
| **EBITDA** | **125.1** | **107.1** | **16.8%** | **112.2** | **101.8** | **10.2%** |
| *EBITDA Margin %* | *27.7%* | *25.0%* | | *24.9%* | *23.3%* | |
| Amortisation, depreciation, impairment losses and provisions | (36.5) | (36.2) | 0.6% | (34.2) | (34.1) | 0.3% |
| **EBIT** | **88.7** | **70.9** | **25.1%** | **78.0** | **67.7** | **15.1%** |
| *EBIT Margin %* | *19.6%* | *16.5%* | | *17.3%* | *15.5%* | |
| **NET FINANCIAL INCOME (EXPENSE)** | **(7.2)** | **(0.7)** | **n.m.** | **(6.2)** | **0.2** | **n.m.** |
| **PROFIT BEFORE TAXES** | **81.5** | **70.2** | **16.1%** | **71.8** | **68.0** | **5.6%** |
| *Profit (loss) before taxes Margin %* | *18.0%* | *16.4%* | | *16.0%* | *15.6%* | |

*(*) Non-GAAP figures exclude the impact of hyperinflation and the valuation of non-industrial real estate in Türkiye.*

# M&A track record

## Since 2001 around EUR **2 billion** invested with no recourse to shareholder equity


**2001 - Cimentas AS and Cimbeton AS**
Entered the Turkish cement market with 2 plants

**2004 - Aalborg Portland A/S and Unicon A/S**
**Transforming deal:**

- **Product diversification** (new products: white cement and aggregates and strong position in ready-mix)
- **Geographical presence** (new countries: Denmark, Norway, Sweden, Egypt, Malaysia, China, US)

**2005**
**Edirne plant** in Türkiye
**Vianini Pipe Inc.** Concrete products in US

**2006**
**Elazig plant** in Türkiye

**2007 - Bolt-on acquisitions**
Sweden, Türkiye and minority stake in China

**2008 - Kudsk & Dahl A/S**
Aggregates in Denmark

**2009 – Sureko**
Entered the waste management in Türkiye

**2010 – Bolt-on acquisitions**
14 ready-mix plants in Italy

**2011 – Acquisition**
Urban waste in Türkiye

**2012 – NWM Holdings Ltd**
Entered the waste management in UK

**Jul. 2016 - Sacci**
Cement and ready-mix in Italy

**Oct 2016 - Compagnie des Ciments Belges (CCB)**

- Cement, aggregates and ready-mix in Belgium
- Ready-mix in France

**Jan. 2018 – Exit from Italy**
Disposal of cement and RMC businesses
315 M€ Cash inflow in January 2018

**Mar. 2018 – Acquisition of 38.75% stake in Lehigh White Cement Co.**

- Reached majority stake of 63.25%
- Largest player and sole manufacturer in the U.S. white cement market

**2021 – Ege Kirmatas AS**
Aggregates in Türkiye

**2023 – Casa Bayan Sdn Bhd**
Aggregates in Malaysia

**2024 – Bolt-on acquisitions**
Ready-mix business in Denmark

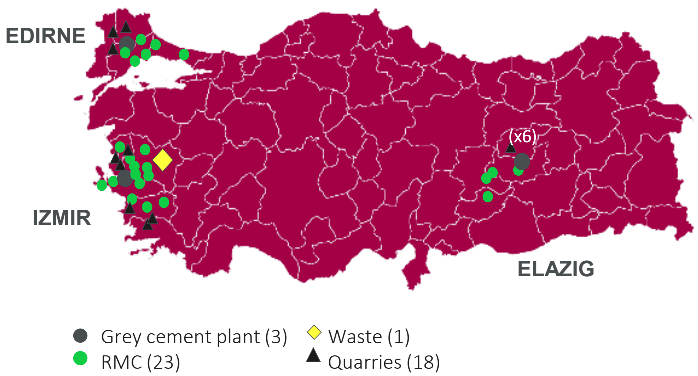
Acquisition of an additional 25.4% stake in Egypt

**2025 – Kars plant**
Sale of Kars cement plant in Türkiye

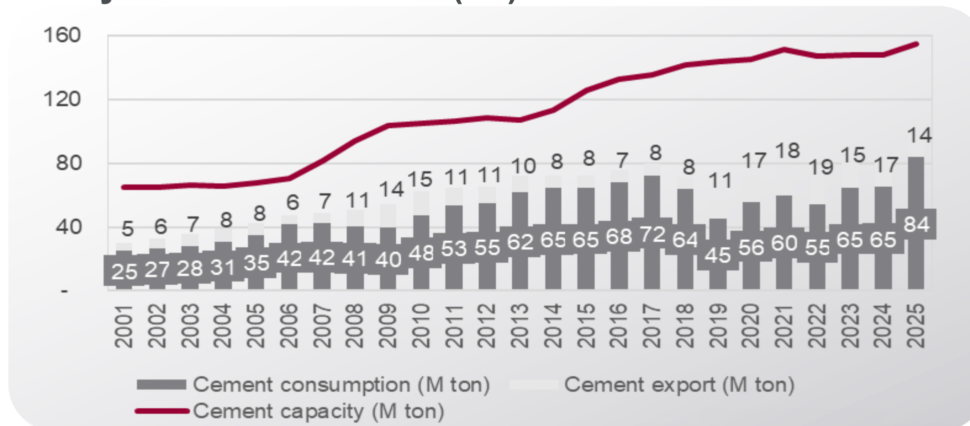
**2026 – Nymølle A/S**

Acquisition of the largest aggregate player in Denmark

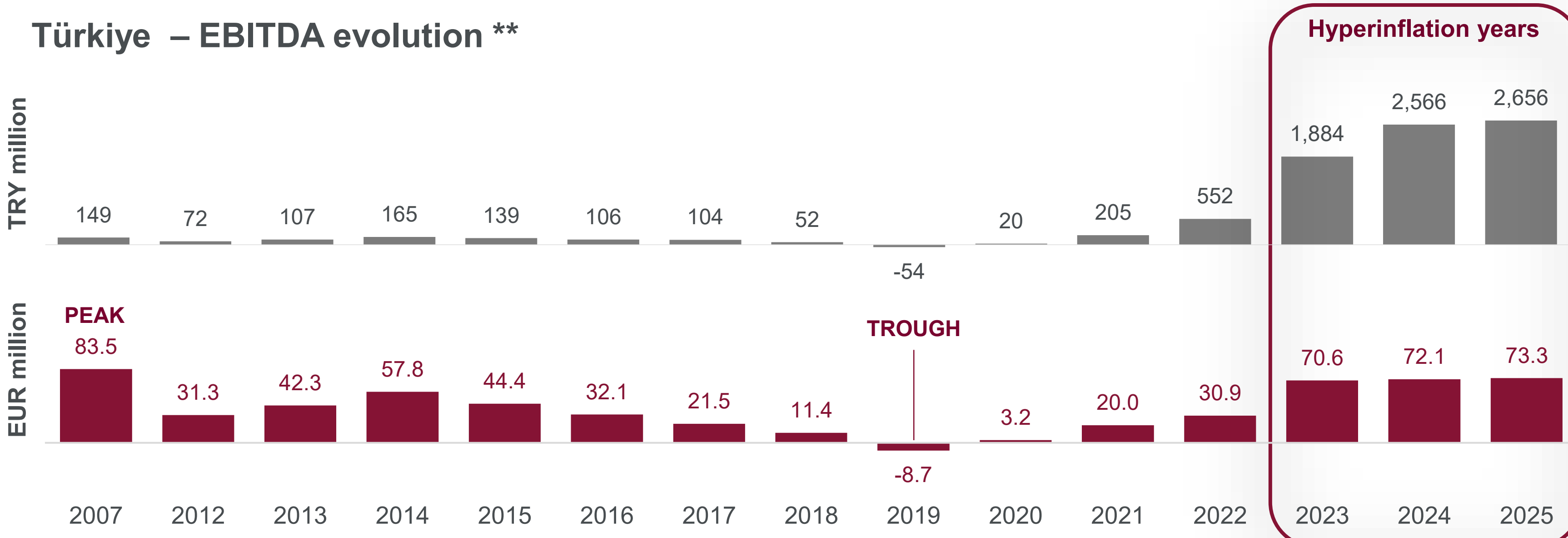
# Türkiye historical figures




## Türkiye - Cement Market (Mt) *




## Türkiye – EBITDA evolution **




** Source: Turkish Statistical Institute, Turkish Cement Manufacturers Association (TÇMB).*
*** Non-GAAP EBITDA, excluding non-recurring income*

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**2026 Financial Calendar:**

| | |
|---|---|
| **12 February** | **Preliminary 2025 Results and Industrial Plan 2026-2028 update** |
| **11 March** | **Full year 2025 Results** |
| **23 April** | **AGM** |
| **7 May** | **First Quarter Results** |
| **29 July** | **First Half Results** |
| **5 November** | **Nine Months Results** |

**Stock listing information:**

**Euronext Milan market, Euronext STAR Milan segment**

**Ticker: CEMI.IM (Reuters)**

**Ticker: CEM.IM (Bloomberg)**


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