

Orgon, August 26, 2026 – 5:45 pm

## ID LOGISTICS: VERY STRONG PERFORMANCE IN THE FIRST HALF OF 2026

- Revenues: +18.3% to 2,084,6 million (+20.0% on a like-for-like basis)
- Underlying operating income: +23.3% to €81.1 million (margin +20 bps)
- Strong cash flow generation and pre-IFRS 16 debt leverage ratio down to 0.6x underlying EBITDA
- ID Logistics expands into its 20<sup>th</sup> country with its first operation in Australia

**ID Logistics, (ISIN: FR0010929125, Mnemo: IDL) European leader in contract logistics, announces today its results for the first half of 2026 with revenues up +18.3% to 2,084.6 million and underlying operating income up +23.3% to €81.1 million.**

Eric HÉMAR, Chairman and CEO of ID Logistics, commented: "ID Logistics posted a strong performance in the first half of 2026: revenues up 20%, an operating margin up 20 basis points, and very strong cash flow generation, all while continuing to invest in future growth. This double-digit growth in our key financial indicators demonstrates the robustness of our business model and the quality of our execution over the past 25 years. The diversity of our customer portfolio and the geographic balance of our operations are, now more than ever, key strengths that will enable us to continue on our strong growth trajectory."

| In €m                                                   | H1 2026 | H1 2025 | Change  |
|---------------------------------------------------------|---------|---------|---------|
| Revenues                                                | 2,084.6 | 1,761.7 | +18.3%  |
| Underlying EBITDA *                                     | 314.8   | 267.0   | +17.9%  |
| As a % of revenues                                      | 15.1%   | 15.2%   | -10 bps |
| Underlying operating income *                           | 81.1    | 65.8    | +23.3%  |
| As a % of revenues                                      | 3.9%    | 3.7%    | +20 bps |
| Cash flow from operations after operating investments * | 264.8   | 155.9   | +69.9%  |
| Net financial debt * / Underlying EBITDA <sup>(1)</sup> | 0.6x    | 0.9x    |         |

\* See definition in the notes

(1) Pre-IFRS 16

Orgon, August 26, 2026 – 5:45 pm

## REVENUES GROWTH OF +18.3% (+20.0% ON A LIKE-FOR-LIKE BASIS)

ID Logistics reported revenues of €2,084.6 million in the first half of 2026, up 18.3%. Adjusted for an overall unfavorable currency effect, growth was 20.0% on a like-for-like basis compared to the first half of 2025, which had already seen an increase of 16.5%.

During the first half of 2026, the following stood out in particular:

- Strong business activity in France, with revenues up 5.7% (24% of Group revenues);
- Strong revenues growth in Europe excluding France (47% of Group revenues), up +19.7% on a like-for-like basis;
- Very strong momentum in North America (21% of Group revenues), with revenue up +46.3% on a like-for-like basis;
- A +13.8% increase on a like-for-like basis for the rest of the world (8% of Group revenues), which now includes Australia - ID Logistics' 20<sup>th</sup> country - where operations began during the first half of the year.

During the first six months of 2026, the Group launched 17 new projects.

## UNDERLYING OPERATING INCOME UP 23.3% TO €81.1 MILLION (MARGIN UP 20 BPS)

This sharp increase in ID Logistics' business was accompanied by improved operating performance, driven in particular by rising productivity from projects launched in 2025 and effective cost control for new projects launched in the first half of 2026. As a result, recurring operating income rose by 23.3% to €81.1 million, growing at a faster rate than revenues. The underlying operating margin reached 3.9% in the first half of 2026, up 20 basis points.

## INCREASE IN NET INCOME ATTRIBUTABLE TO THE GROUP TO €26.2 MILLION (+17.0%)

Net income attributable to the Group totaled €26.2 million in the first half of 2026, up 17.0% compared with the first half of 2025. Net financing expenses totaled €15.1 million, an increase of €4.2 million compared to 2025. Other financial expenses consist of the portion of rent (IFRS 16) paid for warehouses and equipment that has been restated as a financial expense, amounting to €27.2 million, an increase in line with the Group's strong growth.

## STRONG CASH FLOW GENERATION AND SOLID INVESTMENT CAPACITY: DEBT TO EBITDA RATIO DOWN TO 0.6X PRE-IFRS 16 EBITDA

With underlying EBITDA up by €47.8 million and effective management of working capital requirements, ID Logistics' operations generated €264.8 million in cash flow during the first half of 2026, an increase of €108.9 million compared to the first half of 2025 including operational investments. These investments totaled €104.4 million, an increase of €25.2 million compared to the first half of 2025. More than 75% of these investments relate to the implementation of projects won and set to begin in 2026 and 2027, thereby laying the groundwork for the Group's future growth.

Effective management of the strong growth in business - both in terms of profitability and cash flow requirements - has enabled the Group to reduce its pre-IFRS 16 debt-to-EBITDA ratio to 0.6x underlying EBITDA as of June 30, 2026 (0.9x as of June 30, 2025).

Orgon, August 26, 2026 – 5:45 pm

## OUTLOOK

ID Logistics continues to strengthen its position as a preferred partner to major global clients through its understanding of their challenges, its commitment to operational excellence, and its responsiveness. The company is actively working to improve its profitability by optimizing costs, effectively managing project launches, and accelerating the adoption of AI through innovation and automation.

The Group is also expanding its growth drivers by developing its geographic presence, diversifying its customer base, and enhancing its technical expertise, whether through organic growth or acquisitions.

Finally, ID Logistics reminds that its business model is traditionally characterized by more favorable seasonality in the second half of the year, both in terms of profitability and cash flow generation.

*Additional note: The Board of Directors approved the half-year financial statements on August 26, 2026, and the review procedures for the consolidated financial statements have been completed. The limited review report will be issued after the procedures required for the publication of the Half-Year Financial Report have been finalized.*

## NEXT PUBLICATION

Revenues for the 3<sup>rd</sup> quarter of 2026: October 21, 2026, after market close.

## ABOUT ID LOGISTICS



ID Logistics, headed by Eric HÉMAR, is an international contract logistics Group with revenues of €3.7 billion in 2025. ID Logistics manages nearly 450 sites in 20 countries representing 10 million m<sup>2</sup> operated on all five continents with 55,000 employees. With a customer portfolio balanced between distribution, e-commerce, consumer goods, cosmetics and fashion, ID Logistics is characterized by offers involving a high level of technology. Since its creation in 2001, the Group has developed a social and environmental approach through a number of original projects, and is now firmly committed to an ambitious CSR policy. ID Logistics shares are listed on the Euronext regulated market in Paris and are included in the SBF 120 index (ISIN code: FR0010929125, Mnemo: IDL).

Orgon, August 26, 2026 – 5:45 pm

## APPENDIX

- Simplified Income Statement

| <i>In €m</i>                                | H1 2026        | H1 2025        |
|---------------------------------------------|----------------|----------------|
| International                               | 1,581.3        | 1,285.7        |
| France                                      | 503.3          | 476.0          |
| <b>Revenues</b>                             | <b>2,084.6</b> | <b>1,761.7</b> |
| International                               | 60.8           | 47.8           |
| France                                      | 20.3           | 18.0           |
| <b>Underlying operating income</b>          | <b>81.1</b>    | <b>65.8</b>    |
| Amortization of customer relationships      | (3.3)          | (3.4)          |
| Net financial expenses                      | (42.3)         | (32.1)         |
| <i>of which IFRS 16</i>                     | (27.2)         | (21.2)         |
| Income taxes                                | (9.7)          | (7.9)          |
| Associated companies                        | 0.7            | 0.9            |
| <b>Net income</b>                           | <b>26.5</b>    | <b>23.3</b>    |
| Minority interest                           | 0.3            | 0.9            |
| <b>Net income attributable to the Group</b> | <b>26.2</b>    | <b>22.4</b>    |

- Simplified cash flow

| <i>In €m</i>                                                           | H1 2026      | H1 2025       |
|------------------------------------------------------------------------|--------------|---------------|
| <b>Underlying EBITDA</b>                                               | <b>314.8</b> | <b>267.0</b>  |
| Change in WCR                                                          | 65.0         | (20.4)        |
| Other net changes from operations                                      | (10.6)       | (11.5)        |
| Net operating investments                                              | (104.4)      | (79.2)        |
| <b>Cash flow from operating activities after operating investments</b> | <b>264.8</b> | <b>155.9</b>  |
| Net financing expenses                                                 | (13.8)       | (10.8)        |
| Net debt issuances (repayments)                                        | (169.3)      | (144.9)       |
| <i>of which IFRS 16</i>                                                | (205.4)      | (188.3)       |
| Other changes                                                          | 1.5          | (19.3)        |
| <b>Change in cash and cash-equivalent</b>                              | <b>83.2</b>  | <b>(19.1)</b> |
| <b>Cash and cash equivalents at end-of-period</b>                      | <b>366.6</b> | <b>295.2</b>  |

Orgon, August 26, 2026 – 5:45 pm

## DEFINITIONS

- **Change on a comparable basis**

Changes in revenues on a like-for-like basis reflect the organic performance of the ID Logistics Group, excluding the impact of:

- changes in the scope of consolidation: the contribution to revenues of companies acquired during the period is excluded from this period, and the contribution to revenues of companies sold during the previous period is excluded from this period;
- changes in applicable accounting principles;
- variations in exchange rates, by calculating revenues for different periods on the basis of identical exchange rates: thus, published data for the previous period are converted using the exchange rate for the current period.

- **Underlying EBITDA and Underlying operating income**

| <i>In €m</i>                               | H1 2026      | H1 2025      |
|--------------------------------------------|--------------|--------------|
| Net income                                 | 26.5         | 23.3         |
| Associated companies                       | 0.7          | 0.9          |
| Income tax                                 | (9.7)        | (7.9)        |
| Net financial expenses                     | (42.3)       | (32.1)       |
| Operating income                           | 77.8         | 62.4         |
| Amort. of customer relationship acquired   | (3.3)        | (3.4)        |
| <b>Underlying operating income</b>         | <b>81.1</b>  | <b>65.8</b>  |
| Net depreciation and amortization expenses | (233.7)      | (201.2)      |
| <b>Underlying EBITDA</b>                   | <b>314.8</b> | <b>267.0</b> |

- **Cash flow from operating activities after operating investments**

| <i>In €m</i>                                                          | H1 2026      | H1 2025      |
|-----------------------------------------------------------------------|--------------|--------------|
| Cash flow from operating activities                                   | 369.2        | 235.1        |
| Net operating investments                                             | (104.4)      | (79.2)       |
| <b>Net cash from operating activities after operating investments</b> | <b>264.8</b> | <b>155.9</b> |

- **Net financial debt**

| <i>In €m</i>              | 06/30/26     | 12/31/25     |
|---------------------------|--------------|--------------|
| Cash and cash equivalents | 366.6        | 283.4        |
| Financial debt            | 521.9        | 483.5        |
| <b>Net financial debt</b> | <b>155.3</b> | <b>200.1</b> |

- **Net debt**

| <i>In €m</i>              | 06/30/26       | 12/31/25       |
|---------------------------|----------------|----------------|
| Net financial debt        | 155.3          | 200.1          |
| Lease liabilities IFRS 16 | 1,310.2        | 1,171.8        |
| <b>Net debt</b>           | <b>1,465.5</b> | <b>1,371.9</b> |