INVESTOR INFORMATION
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AUSTRIAN POST IN H1 2026:
Revenue increase despite challenging market environment
Growth in e-commerce and declining mail business

Challenging geopolitical and economical market environment

- Cost pressure and digitisation initiatives among key customer groups
- E-commerce market continues to grow, letter mail volumes under pressure

H1 Group revenue +3.8 % to EUR 1,544.0m

- Revenue increase in E-Commerce & Logistics (+11.5 % to EUR 910.9m) supported by new e-commerce provider euShipments.com
- Mail, Branch & Services revenue of EUR 566.1m (–7.4 %) amid ongoing structural transformation in mail and realignment of the company's telecommunications business
- Bank division with net interest income of EUR 37.7m (+14.9 %)

Earnings in H1 below the prior-year level as expected; positive momentum in H2 expected

- EBITDA of EUR 187.7m (–5.9 %); EBIT of EUR 73.3m (–22.0 %)
- Momentum in H2 driven by product and pricing adjustments as well as e-commerce fulfilment

Strategy implementation with strong momentum

- Self-service expansion has created the densest postal network in Austrian Post's history, with 3,000 postal points throughout Austria
- bank99: product expansion and profitable growth trajectory
- Strong market launch of YELLLOW with solid customer acquisition in the initial months
- International expansion through acquisitions: growth in the parcel business in Serbia with D Express and strengthening of the fulfilment business through euShipments.com in Bulgaria

2026 outlook unchanged

- Slight revenue growth expected for the full year 2026
- Target to generate operating earnings in the range of previous years
- Uncertainty due to customs duties and fees in the e-commerce business

CHALLENGING MARKET ENVIRONMENT IMPACTS THE POSTAL SECTOR

Challenging geopolitical and economic environment prevails in 2026. This has consequences in terms of cost pressure and digitisation by business customers, public authorities and institutions as well as influences consumer purchasing behaviour. With this the profound change towards declining mail volumes continues while parcel volumes continue to increase. Austrian Post addresses these trends in Austria through an extensive service offering of postal, logistics and financial services as well as new internet and mobile phone services. In domestic and international e-commerce business, the focus on e-fulfilment is becoming increasingly significant. Furthermore, the market environment in the parcel business remains challenging and highly competitive.

REVENUE AND EARNINGS DEVELOPMENT IN LINE WITH EXPECTATIONS

Austrian Post generated revenue of EUR 1,544.0m in the first half of 2026, implying an increase of 3.8% from the previous year. The E-Commerce & Logistics division was the growth driver once again, benefitting from sustained momentum in online retail and a strong market position in Austria. Divisional revenue was up by 11.5% to EUR 910.9m. The company's parcel volumes in Austria increased by 9%, thus considerably outperforming the market. Additional momentum was provided by the e-commerce fulfilment business with the initial consolidation of the e-commerce provider euShipments.com, which has been part of Austrian Post Group since March 2026.
"Despite a challenging market environment, we were able to increase our revenue. At the same time, we are consistently driving forward the strategic transformation of our Group through investments in new business areas, international expansion and further development of our infrastructure," states Walter Oblin, CEO of Austrian Post.

As forecast, earnings for the first half of the year were below the prior-year level. EBITDA totalled EUR 187.7m (–5.9%), while earnings before interest and taxes (EBIT) was at EUR 73.3m (–22.0%). Earnings were particularly affected by the accelerated decline in mail business, the transformation of the telecommunications business and the fierce competition in international markets. Furthermore, regulatory measures impacted volume developments of Asian online retailers in the Turkish e-commerce market.

STRATEGIC DEVELOPMENTS: NEW BUSINESS AREAS AND EXPANSION STRENGTHEN AUSTRIAN POST

Strategic milestones in Austria in the first half-year 2026 included the successful launch of Austrian Post's own mobile phone brand YELLLOW and the ongoing positive development of bank99. bank99 generated EBIT of EUR 4.2m in the first half of 2026 and started its securities custody business in July 2026. Since its market launch in April, the mobile phone brand YELLLOW has achieved a very good customer ramp-up. The company is consistently investing in service quality and infrastructure in its Austrian domestic market. The 3,000th postal point in Austria was opened in the first half of the year, and the network will grow further to more than 3,100 locations by the end of 2026. Usage of self-service postal stations continues to achieve dynamic growth, underlining the high level of acceptance of modern, 24/7 services. "Austrian Post considers itself to be a reliable provider of essential everyday services, even in a changing market environment," says CEO Walter Oblin. "With bank99, we have succeeded in becoming a recognised and profitable financial services provider in just five years," he adds.

Austrian Post is also consistently pursuing its growth strategy internationally. The takeover of Serbian parcel service provider D Express was formally signed at the end of July. This acquisition enables Austrian Post to strengthen its market position in Southeast and Eastern Europe and strategically expand its international parcel network. In its Logistics Solution business, Austrian Post is expanding its integrated service offering along the entire e-commerce value chain through its investment in the e-commerce provider euShipments.com, which was fully consolidated on 6 March 2026. The offering ranges from fulfilment and storage logistics to cross-border transport solutions and last mile delivery. This enables shippers to access even more comprehensive logistics and fulfilment services from a single source in future.

INVESTMENTS AND NEW GROWTH DRIVERS STRENGTHEN THE OUTLOOK

Austrian Post reconfirms its outlook for the 2026 financial year despite the challenging conditions in the mail and parcel markets. The company continues to expect a slight revenue increase for the entire year 2026. Upper single digit growth in the parcel business is predicted. However, a slowdown in the development of the cross-border e-commerce business is expected in the second half of the year due to numerous national and international customs duties and fees. Revenue in the letter mail and direct mail business is likely to continue declining in the mid-single digit range. A slight rise in revenue is expected in the financial services business (Bank division), driven by an expanded product portfolio. The base case EBIT assumption remains unchanged to achieve operating earnings in the range of recent years. Positive momentum is anticipated in the second half of 2026, especially from product and price adjustments as well as the increased focus on e-commerce fulfilment.

Investments (CAPEX) are still expected to range between EUR 140m and EUR 160m in 2026. Key areas of investment include the modernisation and expansion of logistics facilities, the continued rollout of the parcel locker network in Southeast and Eastern Europe, and electrification of the delivery fleet.

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CONTACTS

Austrian Post
Press-Team
Tel.: +43 (0) 57767-32010
presse@post.at

Austrian Post
Harald Hagenauer, Head of Investor Relations
Tel.: +43 (0) 57767-30400
investor@post.at

KEY FIGURES

EUR m	H1 2025[1]	H1 2026	Change %	Change EUR m	Q2 2025[1]	Q2 2026
Revenue	**1,488.1**	**1,544.0**	**3.8%**	**55.9**	**724.6**	**773.3**
Mail, Branch & Services	611.0	566.1	-7.4%	-44.9	297.3	276.1
E-Commerce & Logistics	817.0	910.9	11.5%	93.9	398.7	463.5
Bank	73.3	71.3	-2.7%	-2.0	35.1	36.0
Corporate/Consolidation	-13.2	-4.3	67.7%	8.9	-6.5	-2.3
Other operating income	60.1	65.3	8.7%	5.2	28.1	33.3
Raw materials, consumables and services used	-429.5	-478.3	-11.4%	-48.8	-207.5	-243.4
Expenses from financial services	-22.6	-17.4	22.7%	5.1	-9.7	-8.8
Staff costs	-699.0	-723.2	-3.5%	-24.1	-338.8	-355.4
Other operating expenses	-202.8	-210.1	-3.6%	-7.3	-100.2	-108.0
Results from financial assets accounted for using the equity method	1.9	1.3	-30.7%	-0.6	0.9	0.0
Net monetary gain	3.2	6.1	89.6%	2.9	0.4	2.8
EBITDA	**199.4**	**187.7**	**-5.9%**	**-11.7**	**97.8**	**93.9**
Depreciation, amortisation and impairment losses	-105.4	-114.4	-8.6%	-9.0	-52.2	-57.4
EBIT	**94.0**	**73.3**	**-22.0%**	**-20.7**	**45.6**	**36.5**
Mail, Branch & Services	69.8	48.7	-30.3%	-21.1	32.4	21.1
E-Commerce & Logistics	32.1	27.5	-14.3%	-4.6	13.5	15.1
Bank	1.8	4.2	>100%	2.4	2.4	1.6
Corporate/Consolidation[2]	-9.7	-7.1	27.0%	2.6	-2.7	-1.4
Financial result	-1.8	-32.2	<-100%	-30.4	-4.1	-18.0
Financial result excl. valuation of put-option liabilities[3]	*-5.2*	*-10.0*	*-92.6%*	*-4.8*	*-3.1*	*-4.8*
Profit before tax	**92.2**	**41.1**	**-55.4%**	**-51.1**	**41.5**	**18.5**
Income tax	-23.8	-18.3	23.2%	5.5	-12.7	-11.0
Profit for the period	**68.4**	**22.8**	**-66.7%**	**-45.6**	**28.8**	**7.5**
Earnings per share (EUR)[4]	**0.99**	**0.32**	**-67.4%**	**-0.67**	**0.43**	**0.10**
Earnings per share excl. valuation of put-option liabilities (EUR)[3,4]	***0.94***	***0.65***	***-30.6%***	***-0.29***	***0.44***	***0.30***
Gross cash flow	**158.3**	**139.0**	**-12.2%**	**-19.3**	**76.9**	**68.3**
Cash flow from operating activities	**28.6**	**10.8**	**-62.4%**	**-17.9**	**-35.4**	**-126.9**
CAPEX	41.3	44.7	8.3%	3.4	16.5	24.2
Free cash flow	**29.6**	**-31.7**	**<-100%**	**-61.3**	**-15.6**	**-59.5**
Operating free cash flow[5]	**150.1**	**116.6**	**-22.3%**	**-33.5**	**33.4**	**43.2**

[1] Adjusted to reflect the new segment structure effective 1 January 2026
[2] Includes the intra-Group cost allocation procedure
[3] Valuation of financial parameters of 20% put-option for Aras Kargo, 30% put-option for euShipments.com, 20% put-option for Agile Actors
[4] Undiluted earnings per share in relation to 67,552,638 shares
[5] Free cash flow before acquisitions, money market investments, growth CAPEX, CBA and cash held temporarily