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Kalmar Q2 2026 pre-silent newsletter

With our silent period starting tomorrow on Wednesday 1 July, we would like to highlight some of the most notable events of the second quarter of 2026.

Our half-year financial report for January–June 2026 will be published on **Wednesday 22 July**.

IR recap

In April–June 2026, we hosted close to 30 events, meeting with more than 30 institutions in Frankfurt, London, Geneva, Zurich, Stockholm and Finland as well as online. In one-to-one and group sessions, the topics that the participants were most interested in were:

- Geopolitical situation and global economy: impact of tariffs and the Middle East crisis
- Market dynamics: the current market cycle, market position, competitive landscape, in particular the Chinese competition
- Services business: profitability, capture rates and strategies for growth and profitability improvement especially in the US market
- Electrification and automation: EV adoption and customer benefits, the future of automation
- Capital allocation strategy
- The upcoming CMD in November 2026

On 24 June, we had our pre-silent call for analysts. In case you missed the call, here is a link to the call recording and the presentation.

In 2026, we will continue the active dialogue with our investors. We are very excited to see you again in conferences, meetings and roadshows listed at the end of this newsletter.

Consensus overview

Please click here to view the latest consensus overview by VARA Research.

Announced orders in Q1 and Q2 2026

- 29 June 2026 (Q2 2026): 4 Kalmar electric reachstackers to customers in Inner Mongolia, Tianjin, Shanghai and Hong Kong, China
- 12 June 2026 (Q2 2026): 2 Kalmar electric reachstackers to C. Steinweg - Handelsveem B.V., in Rotterdam, the Netherlands
- 5 May 2026 (Q2 2026): Customised training simulator for heavy material handling to SSAB Special Steels in Oxelösund, Sweden
- 28 April 2026 (Q2 2026): 6 Kalmar electric empty container handlers to Lechman Terminais in Brazil
- 13 April 2026 (Q1 2026): 6 Kalmar hybrid straddle carriers and 1 Kalmar electric straddle carrier to Port of Tauranga in New Zealand
- 2 April 2026 (Q1 2026): 14 Kalmar hybrid straddle carriers to PSA Antwerp in Belgium

All releases

Other releases from Q2 2026

On 29 June 2026, Kalmar and Port of Helsingborg strengthen collaboration with frame agreement for electric reachstacker procurement. Kalmar has been selected by the Port of Helsingborg as the supplier of electric reachstackers under a six-year frame agreement covering the potential procurement of up to nine machines.

On 9 June 2026, we announced the partnership with Syncron to implement our parts planning solution. This collaboration supports our strategic pillar of Growing Services by improving parts availability and aftermarket performance as well as increasing dealer network effectiveness globally. We will go live with Syncron's system in October 2026.

On 4 June 2026, we published our updated Disclosure Policy. The Disclosure Policy has been updated to align with the amendments to the EU Market Abuse Regulation (EU) No 596/2014 applicable from 5 June 2026.

On 20 May 2026, we announced the completion of the expansion of our Shanghai manufacturing plant. The expansion improves operational efficiency by centralising post-assembly tasks and strengthens long-term flexibility with capacity for EV assembly and support for production growth.

On 19 May 2026, we announced the launch of the fully electric version of the Kalmar TT7 terminal tractor, the TT7 EV, in European markets.

On 13 May 2026, we introduced the upgraded Kalmar T2i Terminal Tractor designed to improve operational efficiency with enhanced modularity and superior ergonomics. The T2i Terminal Tractor is produced at our Shanghai facility and is specifically tailored for heavy industrial sites, ports, terminals and distribution hubs across the APAC, Middle East, Africa, and Latin America regions.

Changes in the Kalmar Leadership Team

On 28 April 2026, we announced that Tamara de Gruyter was appointed President of Services and member of the Kalmar Leadership Team as of 1 September 2026. She

will join Kalmar from Wärtsilä where she most recently served as President of Wärtsilä Energy Storage and a member of the Wärtsilä Board of Management. Thomas Malmborg will step down from the role of President of Services and member of the Kalmar Leadership Team on 1 September 2026. Thomas Malmborg will remain with Kalmar until the year end to ensure a smooth transition.

All releases

Upcoming activities in Q3–Q4 2026

- 22 July: Half-year financial report January–June 2026
- 12 August: Danske Bank Q2 results lunch
- 18 August: SEB Nordic Large Cap seminar, Stockholm
- 19 August: Nordea Small & Mid Cap Days, Stockholm
- 7-9 September: Q2 roadshow in Edinburgh, London and Oslo by Danske Bank
- 11 September: Inderes & Alma Media Stock Investor week (virtual)
- 14 September: Quo Vadis Industrials Virtual Event
- 24 September: DNB Carnegie Small & Mid Cap 1-1 Day, Helsinki
- 29 October: Interim report January–September 2026 and webcast
- 30 October: Nordea Q3 results lunch
- 2 November: Capital Markets Day – we will revert to the details during the summer, stay tuned for the official invitation!
- 4 November: Handelsbanken Nordic Insight Days, London
- 25 November: Danske Bank Winter Seminar, Copenhagen
- 26 November: Aktiespararna conference in Stockholm

Please note that the event schedule is preliminary and subject to change. You will always find an up-to-date listing of upcoming conferences and events in our investor calendar.

If you would like to schedule a meeting with Kalmar, please contact us at ir@kalmarglobal.com.

Investor calendar

Kalmar's IR team

Carina Geber-Teir – SVP, IR, Communications & Marketing, carina.geber-teir@kalmarglobal.com

Henna Hakala – IR coordinator, henna.hakala@kalmarglobal.com

Camilla Maikola – Director, Investor Relations, camilla.maikola@kalmarglobal.com (on maternity leave as of 14 November 2025)

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Best regards,

Carina and Henna from Kalmar's Investor Relations

Kalmar Corporation

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