

Press release

Le Bourget-du-Lac, October 8, 2026 - 6:00pm CEST



2026 HALF-YEAR RESULTS

- \ **Revenue growth: +77.5% to 4,286K€**
- \ **Net income nearly breaks-even: -82 K€ compared with -1,644K€ a year earlier**
- \ **Confirmed trajectory toward breakeven: EBITDA of -336K€ compared with -892 K€**
- \ **Stronger sales momentum and a promising second half of the year**

Roctool (Euronext Growth – FR0010523167 – ALROC), a specialist in mold heating and cooling technologies for plastics and composites, presents its results for the first half of 2026, consolidated as of June 30, 2026, and approved by the Board of Directors on October 8, 2026.

Following a transitional year in 2025, marked by a strategic refocus on the company's core technology business, rapid induction heating and cooling solutions for molds, the strengthening of its equity position and the 6€ million strategic order secured in the defense and aerospace sectors (press release dated December 11, 2025), the first half of 2026 confirms that these strategic actions are now translating into growth, as announced with the publication of the annual results on April 15, 2026.

Consolidated data (in K€)	S1 2026	S1 2025	Δ vs 25
Revenue	4 286	2 414	+77,5 %
EBITDA	(336)	(892)	+556 K€
<i>as a % of revenue</i>	<i>-7.8 %</i>	<i>-37.0 %</i>	<i>+ 29 pts</i>
EBIT (Operating Income)	(318)	(1 118)	+ 72%
Net Income	(82)	(1 644)	+95%



Business: 77.5% growth driven by several factors

Roctool reported consolidated revenue of 4,286K€ in the first half of 2026, compared with 2,414K€ in the first half of 2025, representing a 77.5% increase. This growth was driven by several factors: the delivery of strategic orders in the defense and aerospace sectors; new orders in the automotive sector, particularly in North America and Europe; and the launch of new projects with major clients in the beauty, sports and leisure, and consumer goods sectors.

Sales of goods totaled 3,406K€, compared with 1,603K€ in the first half of 2025, representing an increase of 112.5%. This reflects solutions currently being delivered in the aerospace and defense sectors, supplemented by new orders from other sectors. Revenue from services totaled 575 K€, compared to 810K€. This temporary decline is due to the progressive deployment of the strategic order, for which the services portion is concentrated in the second half of the year and early 2027. License and royalty revenue reached 305 K€, compared to 20K€ a year earlier.

EBITDA came in at -336 K€ in the first half of 2026, compared with -892K€ in the first half of 2025. The loss was reduced by 62%, and the EBITDA margin improved by 29 percentage points, from -37.0% to -7.8% of revenue. This improvement reflects both business growth and the continued cost discipline implemented by management since 2024, with operating expenses kept to 2,761K€ (+2%) despite the sharp increase in business activity. EBIT came in at -318K€, compared with -1,118K€. Net income was -82K€, compared with -1,644K€ a year earlier, representing a 95% improvement. **Roctool continues on its path towards breaking even.**



An international presence at the heart of the model

Roctool has historically been **strongly focused on international markets**, with a significant presence in Asia, North America, and Europe. This international dimension is a **distinctive strength**: it gives the company agility and close ties with its customers, enables it to create value in diverse markets, and reduces the business model's dependence on a single market or region.

Sector diversification is progressing and improving the visibility, recurring nature, and quality of Roctool's revenue. Beyond its traditional sectors, the first half of the year was marked by the company's entry into the defense and aerospace sectors, a new area for the company on this scale:

- Defense and Aerospace: First Major International Industrial Deployment
- Automotive: continued business momentum, driven by new orders and the gradual return of investment by automotive manufacturers.
- Beauty, sports and leisure, and consumer goods: numerous new projects have been launched with major industry leaders.



Cash position as of June 30

As of June 30, 2026, cash and cash equivalents totaled 1,310K€, compared with 480K€ a year earlier. Notably, this level was achieved after six months of sustained activity, even as the ramp-up of the strategic order automatically increased working capital requirements. The company continues to carefully manage its cash position in the second half of the year amid challenging conditions.

Mathieu Boulanger, CEO of Roctool, stated: *“These half-year results reflect the implementation of the three priorities announced in January. Our refocus on our core business, induction technologies that reduce cycle times, improve part quality, and eliminate secondary operations, is enabling us to bring new projects to fruition across several markets and geographic regions. Operational excellence is evident in the improvement in EBITDA, a net income close to break even, and cash reserves that have risen to €1.3 million. Supporting our customers is our top priority, and our teams will remain fully engaged with deliveries through the end of the year.*

Our presence at numerous international and strategic trade shows reinforces our commercial momentum and points to future opportunities for 2027. We are approaching the remainder of the fiscal year with ambition, to continue building the next stages of our development alongside our customers and partners.”



The second half of the year is well underway: the focus is on deliveries

The second half of the year started well. The order backlog is robust and provides good visibility into the continued momentum. Roctool's priority through the end of the year is to make scheduled deliveries to all customers, particularly those in the defense and aerospace sectors. The company has already begun discussions with its major customer regarding potential new programs for 2027. The second half of the year will also be focused on enhancing the visibility and value of the Company's service offering.

New projects are also under discussion for early 2027, primarily in the automotive, beauty, sports and leisure, and consumer goods sectors. Several major customers are also evaluating the combination of Roctool and Trexel technologies, which integrates rapid mold heating and cooling with microcellular foaming to produce lightweight plastic parts with high-quality surfaces, following the agreement announced at Chinaplas ([press release dated April 29, 2026](#)).

The management team and Board of Directors remain actively engaged in advancing Roctool's strategic development priorities. The Company will communicate further progress in due course.

Regarding the [Extraordinary General Meeting on October 22, 2026](#)

Roctool's shareholders are summoned to an Extraordinary General Meeting on October 22, 2026, at the company's headquarters. In accordance with Article L.225-248 of the Commercial Code, this meeting is called to decide on the continuation of the business, as shareholders' equity has fallen below half of the capital issued as a result of losses in previous fiscal years.

This is a technical and regulated legal procedure that every commercial company is required to initiate whenever the financial statements for the most recent approved fiscal year show that shareholders' equity has fallen below half of the issued capital. In this regard, we remind you that following the Ordinary General Meeting held on June 26, 2026, shareholders' equity amounted to 832,011 euros, with a share capital of 2,483,237.20, which explains why Roctool has initiated this mandatory procedure.

However, this does not jeopardize ongoing projects, nor does it affect the Company's governance or capital structure, and it does not directly result in any financial transaction or dilution.

The Board of Directors recommends continuing operations. The company will then have the statutory period to restore its equity, a process directly supported by the results of this first half year, marked by a return to growth and the near achievement of net breakeven. The meeting materials are available on the company's website.

The semi-annual financial report as of June 30, 2026, will soon be made available to the public and filed with the Autorité des Marchés Financiers. This document will be made available in accordance with applicable regulations and can be viewed on the [website](#).

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About Roctool: Roctool specializes in rapid heating and cooling technologies for plastic injection and composite molding. The processes developed by Roctool are in production in the following industries: automotive, electronics, consumer goods, renewable energy, luxury, beauty packaging, and medical. Roctool provides induction molding technologies for plastics, composites, and recycled materials. Roctool offers engineering services, induction generators, tooling equipment, and on-site support to manufacturers worldwide. Roctool technologies are renowned for eliminating secondary operations, allowing manufacturers to reduce the overall cost of parts produced, as well as their environmental impact. The head office is in Le Bourget-du-Lac (France). Roctool is present in North America, Europe & Asia. More information on: www.roctool.com