



BUILT IN THE FIELD. PROVEN EVERY DAY.

2025 Sustainability Report



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TO OUR STAKEHOLDERS,

We measure success by how we perform, how we operate, and how we support our people, customers, and communities. In 2025, that mindset drove one of the strongest years in Kodiak's history.

We delivered record financial and operating performance while continuing to strengthen the foundation of our business. Revenue reached approximately \$1.3 billion, and disciplined execution across our operations helped generate approximately \$715 million in adjusted EBITDA.⁽¹⁾ Contract Services adjusted gross margin percentage reached a record 68.4%,⁽¹⁾ reflecting the strength of our operating model. Fleet utilization reached 97.7%, reflecting strong customer demand, efficient asset deployment, and the consistency of our field execution.

We also strengthened our balance sheet, improved our leverage profile, and returned approximately \$263 million to shareholders through dividends and share repurchases. In August 2025, Kodiak was added to the S&P SmallCap 600 index, further reflecting the company's growth and market recognition.

These results were not driven by a single initiative. They are the result of disciplined maintenance, investment in technology, and a well-trained workforce. When equipment operates as designed, variability declines, efficiency improves, and both safety and environmental performance are strengthened.

That operating model defines how we support our customers. Reliable compression is critical to our customers' operations, and dependable performance allows them to plan, execute, and grow with confidence. By focusing on execution in the field rather than reacting to outcomes, we deliver performance that supports both operational and commercial success.

Safety remains fundamental to how we operate and one of the responsibilities we take most seriously as a company. The work our teams perform every day carries real risk, and protecting our people will always come before any operational or financial objective. In 2025, Kodiak achieved a TRIR of 0.46, completed more than 150 engine conversions with zero injuries, and continued to strengthen participation in our Behavior-Based Safety program. These results reflect the accountability, preparation, and commitment our employees bring to the field every day.

We also continued to invest in technology and strengthen the systems and tools that support our operations. During the year, we implemented an enterprise resource planning system. We expanded our use of advanced analytics, predictive maintenance, and real-time monitoring tools, improving visibility, coordination, and execution across the fleet.

Our people remain the foundation of our success. From field technicians to employees supporting operations and corporate functions, Kodiak's workforce demonstrates a daily commitment to doing the job the right way.

That same commitment extends beyond our operations. Employees support the communities where they live and work through volunteerism, charitable giving, and active engagement in causes that matter to them.

As we look ahead, demand for reliable, large horsepower compression remains strong. With the acquisition of Distributed Power Solutions, LLC in the first quarter of 2026, we are expanding into distributed power generation in a way that complements our compression platform and aligns with growing power demand.

Our focus remains clear: operate with discipline, invest where it matters, support our customers, and continue building a business that delivers long-term value.

Sincerely,



Mickey McKee

President and Chief Executive Officer
Kodiak Gas Services



"Our people remain the foundation of our success. From field technicians to employees supporting operations and corporate functions, Kodiak's workforce demonstrates a daily commitment to doing the job the right way."

Mickey McKee

President and Chief Executive Officer
Kodiak Gas Services

⁽¹⁾Adjusted EBITDA and adjusted gross margin percentage are non-GAAP financial measures. We define adjusted EBITDA as defined net income (loss) before interest expense, income tax expense, and depreciation and amortization, plus (i) impairment of long-lived assets; (ii) loss (gain) on derivatives; (iii) equity compensation expense; (iv) severance expenses; (v) transaction expenses; (vi) sales tax reserve; (vii) loss (gain) on disposal of business; and (viii) loss (gain) on sale of assets. We define adjusted gross margin as revenue less cost of operations, exclusive of depreciation and amortization expense. We define adjusted gross margin percentage as adjusted gross margin divided by total revenues. See "Non-GAAP Financial Measures" in our earnings release furnished as exhibit 99.1 to the Current Report on Form 8-K filed with the U.S. Securities and Exchange Commission on August 6, 2026, for additional information on adjusted EBITDA and adjusted gross margin, including reconciliations to the most directly comparable financial measures under U.S. GAAP.

A MESSAGE FROM OUR CHIEF OPERATIONS OFFICER

Built in the Field. Proven Every Day.

Our business is built on the men and women who show up every day to keep equipment running, support our customers, and deliver on our commitments.

That foundation has not changed. What continues to evolve is how we support our teams, how we operate, and how we execute across the fleet.

In 2025, the focus was straightforward: do the work the right way, every time.

That means operating with discipline, maintaining equipment to a high standard, and making improvements that may not always be visible but directly impact performance. From planned maintenance to targeted upgrades, our teams remained focused on reducing risk, improving reliability, and strengthening how our equipment performs in the field.

Safety leads how work is done. It is not separate from operations; it is part of every job we plan, every asset we maintain, and every decision we make. That mindset ensures our people are protected and able to go home safely at the end of the day. It also drives how we maintain and improve our equipment over time.

Reliability is what our customers expect, and it is something we take personally. Keeping units online, minimizing disruptions, and delivering dependable performance requires more than quality equipment. It requires disciplined execution, clear communication, and a team that takes ownership of outcomes. Our field teams continue to raise the standard in each of these areas.

What stands out most is how our teams approach improvement. There is a shared expectation to do the job right, support one another, and take ownership of results. Whether performing upgrades, executing overhauls, or identifying better ways to operate, that mindset is consistent across the organization.

As the company continues to grow, the priority remains supporting the people who make the business work. That includes investing in training, strengthening leadership in the field, and providing teams with the tools and support needed to succeed. When the workforce is prepared and supported, performance follows.

Success is not defined by a single metric. It reflects how people, equipment, and execution come together. That is what sets Kodiak apart and will continue to drive performance going forward.

I am proud of our team and the work they deliver every day.

Chad Lenamon
Chief Operations Officer
Kodiak Gas Services



“From planned maintenance to targeted upgrades, our teams remained focused on reducing risk, improving reliability, and strengthening how our equipment performs in the field.”

Chad Lenamon
Chief Operations Officer
Kodiak Gas Services

OUR BUSINESS

Kodiak Gas Services, Inc. (Kodiak) is a leading provider and operator of large horsepower contract compression infrastructure in the United States, supporting the critical movement and processing of natural gas across key production regions. Our Contract Services and related services are critical to our customers' ability to reliably produce, gather, and transport natural gas and oil. We are a market leader in the Permian Basin, which is the largest producing natural gas and oil basin in the U.S. We operate our large horsepower compression units primarily under fixed-revenue contracts with many blue-chip upstream and midstream customers. Our compression assets have long useful lives consistent with the expected production lives of the key regions where we operate. We believe our customer-centric business model positions us as the preferred contract compression operator for our customers and creates long-standing relationships. We strategically invest in the training, development, and retention of our highly skilled and dedicated employees and believe their expertise and commitment to excellence enhances and differentiates our business model.



2025 HIGHLIGHTS

2025 was defined by disciplined execution across the business. Performance is driven by execution in the field and how effectively the fleet is operated and maintained.

Operational and Financial Performance

- Approximately \$1.3 billion in revenue
- Approximately 4.5 million horsepower deployed
- Contract Services adjusted gross margin of 68.4%⁽¹⁾
- Approximately \$715 million in adjusted EBITDA⁽¹⁾
- Year-end fleet utilization of 97.7%
- Approximately \$263 million returned to shareholders
- Inclusion in the S&P SmallCap 600 Index

Operational Execution

- Completed targeted fleet upgrades to improve reliability and extend equipment life
- Improved equipment performance to reduce unplanned disruptions and strengthen runtime
- Implemented an enterprise resource planning (ERP) system to enhance coordination and data-driven decision making
- Expanded internal capabilities to support performance monitoring and continuous improvement

These efforts strengthened reliability, reduced failure risk, and improved overall fleet performance.

Fleet and Market Position

- Approximately 150,000 new horsepower placed into service
- Approximately 40% of new horsepower electric motor-driven
- Approximately 80% of the total horsepower is large horsepower
- Strong presence across U.S. shale gas basins
- Divestiture of international operations to focus on core U.S. compression business

Safety Performance

- Total Recordable Incident Rate (TRIR) of 0.46
- Increased participation in Behavior-Based Safety programs and safety engagement
- Approximately 32,633 hours of safety-specific training

Innovation and Systems

- More than 7,500 hours of workforce training to support the ERP implementation
- Expanded predictive maintenance and monitoring capabilities
- Initiated development of Kodi, an internal AI-enabled platform designed to enhance troubleshooting, improve access to operational data, and support decision making across the business

Strategic Positioning

- Continued focus on U.S. large horsepower compression
- Positioned to support long-term demand for large horsepower compression and related infrastructure

These results reflect execution across the business rather than isolated initiatives.

⁽¹⁾Adjusted EBITDA and adjusted gross margin percentage are non-GAAP financial measures. We define adjusted EBITDA as defined net income (loss) before interest expense; income tax expense; and depreciation and amortization; plus (i) impairment of long-lived assets; (ii) loss (gain) on derivatives; (iii) equity compensation expense; (iv) severance expenses; (v) transaction expenses; (vi) sales tax reserve; (vii) loss (gain) on disposal of business; and (viii) loss (gain) on sale of assets. We define adjusted gross margin as revenue less cost of operations, exclusive of depreciation and amortization expense. We define adjusted gross margin percentage as adjusted gross margin divided by total revenues. See "Non-GAAP Financial Measures" in our earnings release furnished as exhibit 99.1 to the Current Report on Form 8-K filed with the U.S. Securities and Exchange Commission on August 6, 2026. for additional information on adjusted EBITDA and adjusted gross margin, including reconciliations to the most directly comparable financial measures under U.S. GAAP.

THE KODIAK GREENPRINT

The Kodiak Greenprint defines how the company operates, allocates capital, and delivers performance.

It is not a separate framework or initiative. It is embedded in daily execution and guides how work is performed throughout the business.

The Greenprint is built on four strategic drivers:

- Service Amplified
- Smart Money
- Force Multiplier
- Extraordinary Together

These **Strategic Drivers** align with our Purpose, shape our direction, and guide our actions to achieve our goals and drive sustainable growth.

Sustainability at Kodiak is the result of operating under the Greenprint. Performance, safety, environmental outcomes, and community impact are all shaped by how work is executed across the organization.



ENVIRONMENTAL

**PERFORMANCE
REFLECTS
DISCIPLINED FIELD
OPERATIONS.**

HOW KODIAK OPERATES

Kodiak’s operating model is built on maintenance, engineering, training, and technology working together to ensure equipment operates as designed across all environments and customer requirements.

When equipment operates as designed:

- Safety risks are reduced
- Variability is minimized
- Efficiency improves
- Environmental outcomes are strengthened

Reliable operation is the foundation of performance across the fleet.

Operational Performance and Equipment Reliability

The effectiveness of this operating model is reflected in fleet performance.

In 2025:

- Average runtime across the fleet was approximately 99%

These results are supported by preventative maintenance, standardized processes, and a trained workforce executing to a reliable standard.

High runtime and uptime support dependable service, reduce the likelihood of unplanned events, and improve overall efficiency for customers.

Reducing variability remains a key driver of performance. Predictable operation improves planning, lowers risk, and strengthens outcomes across the business.

Contract Structure and Operational Stability

Kodiak’s contract compression model is supported by multi-year agreements that provide visibility into revenue and support stable fleet utilization.

These contracts typically include provisions related to equipment availability, cost recovery, and long-term customer relationships. This structure enables effective planning, disciplined capital allocation, and a focus on reliability.

Kodiak serves a diversified customer base of leading U.S. oil and gas producers and midstream customers. Long-term relationships and structured agreements support stability across operations.

The company maintains a disciplined capital allocation framework focused on protecting the balance sheet, supporting dividends, and funding growth.

Environmental Stewardship

Environmental performance is shaped by how equipment operates and how work is executed in the field.

Kodiak owns and operates compression equipment deployed at customer sites. The underlying facilities and associated air permits are owned and maintained by customers, who are responsible for emissions reporting under applicable regulatory frameworks.

As a result, Kodiak’s direct greenhouse gas emissions are primarily limited to company-owned vehicles and office operations. While this defines the boundary of regulatory responsibility, it does not fully reflect operational impact.

The performance of compression equipment directly influences runtime stability, maintenance frequency, and the likelihood of unplanned events. These factors can affect fuel use, efficiency, and emissions outcomes at customer sites.

Unplanned shutdowns, restarts, and mechanical failures can increase fuel consumption, reduce efficiency, and introduce emissions variability. Maintaining dependable operation reduces these events and establishes a more stable performance.

Kodiak focuses on the factors it can directly control:

- Preventive and scheduled maintenance designed to reduce equipment failures
- Proper equipment loading and operation designed to improve efficiency
- Fleet modernization and targeted upgrades to extend equipment life and lower emissions
- Predictive monitoring, telemetry, and early issue identification designed to detect wear or abnormal conditions before failures occur

In 2025, no environmental incidents resulted in a material regulatory impact.



Fleet Modernization and Electrification

Kodiak continues to modernize its fleet to support evolving operating conditions and customer needs.

In 2025:

- Kodiak invested approximately \$115 million in equipment overhauls, upgrades, and maintenance activities to improve reliability, enhance safety, and support more efficient fleet performance
- Approximately 150,000 new horsepower was placed into service
- Approximately 40% of new horsepower was electric motor-driven

Electric compression, where infrastructure is available, enhances Kodiak's ability to support customer operations with flexible compression solutions across a range of operating environments.

Innovation and Technology

Kodiak is focused on improving performance, strengthening reliability, and enhancing execution in the field through innovation.

Rather than pursuing standalone initiatives, systems, data, tools, and workforce capability are integrated directly into operations to improve how work is performed and how assets are managed over time.

Data and Digital Infrastructure

Kodiak continues to invest in systems and operational technology that provide visibility across the business.

These systems support real-time monitoring of equipment performance, operating conditions, and maintenance activity, enabling teams to make informed decisions and respond quickly to changing conditions.

The company's ERP platform and other internal systems improve coordination across operations, strengthen planning, and provide insight into fleet performance and maintenance trends.

This visibility allows for the earlier identification of potential issues and supports more effective execution across the organization.

Kodiak is also expanding its use of advanced analytics to support predictive maintenance and operational optimization.

Emerging technologies, including artificial intelligence, are being evaluated to enhance internal analysis and decision making. Adoption remains disciplined, with a focus on data integrity, cybersecurity, and human oversight.

Predictive Maintenance and Reliability

Data and continuous monitoring are used to improve maintenance planning and equipment reliability.

By analyzing real-time performance data, Kodiak can identify early signs of wear or abnormal conditions before they lead to failure. This allows maintenance to be planned proactively, reducing unplanned downtime and improving fleet performance.

These capabilities extend equipment life, improve utilization, and reduce the likelihood of unplanned events.

Technology in the Field

Technology is designed to support employees in the field and improve how work is done.

Telemetry, remote monitoring, and integrated data platforms provide continuous visibility into equipment condition, including pressure, temperature, vibration, and performance data. These tools allow teams to identify and address issues before they result in failures, shutdowns, or emissions-related events.

Improved visibility reduces reliance on reactive maintenance, minimizes unplanned callouts, and limits the need for overnight or higher-risk site visits.

Mobile tools and integrated systems provide technicians with information needed to assess equipment, plan work, and execute tasks effectively.



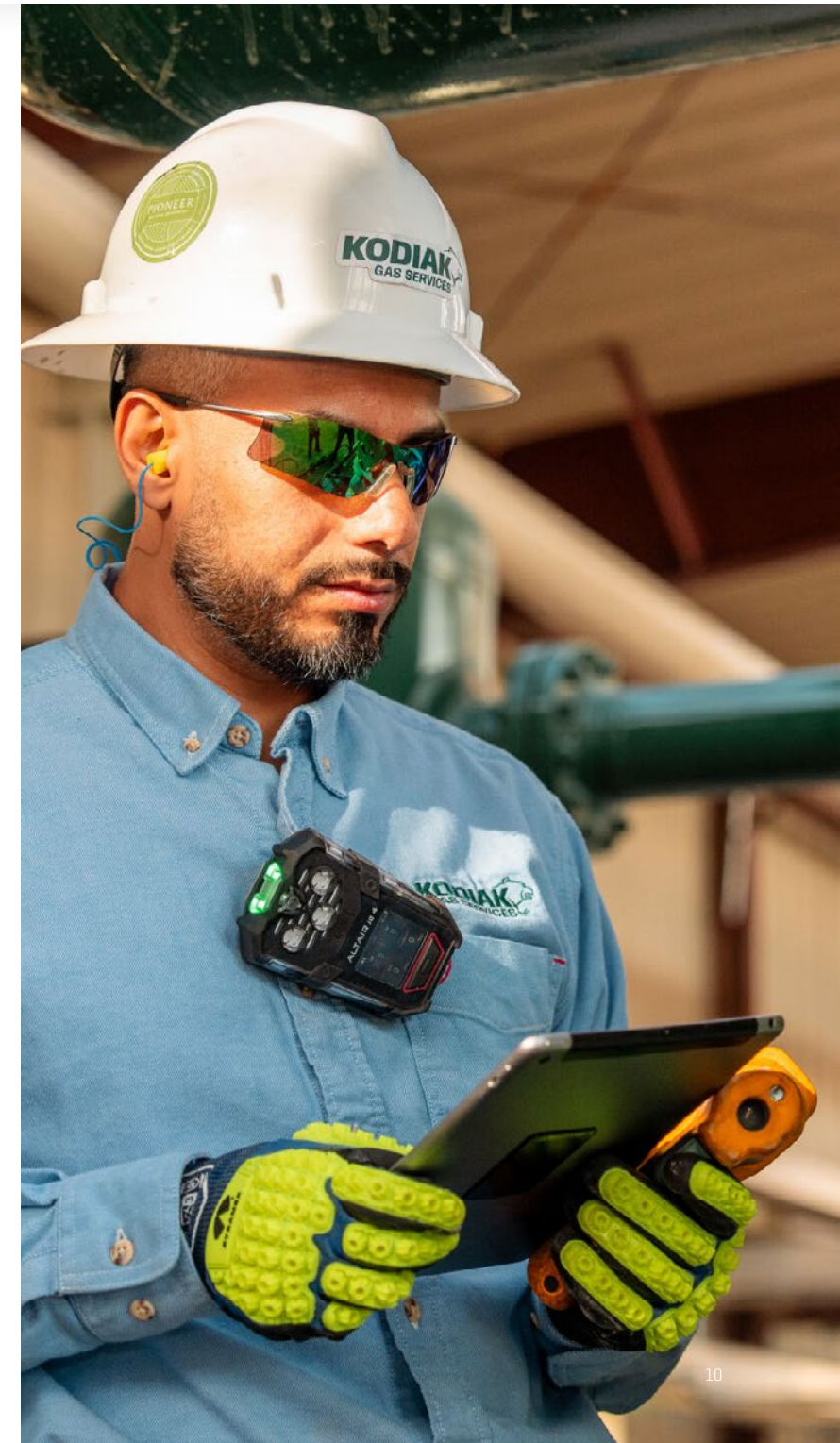
Kodiak is also deploying an internal platform, Kodi, designed to support field operations and enhance access to operational knowledge in real-time.

Kodi functions as an AI-enabled assistant that allows technicians to describe equipment conditions and receive guidance on troubleshooting, diagnostics, and next steps.

By integrating equipment data, maintenance history, and operational knowledge, Kodi helps our team members identify potential issues more quickly and determine appropriate actions in the field. The system is designed to streamline troubleshooting, reduce time to resolution, and improve overall equipment availability.

Kodi is currently in pilot deployment with a select group of field personnel, with initial use focused on troubleshooting support and real-time access to operational knowledge. As the platform continues to evolve, broader deployment across additional areas of the business is planned.

Tools like Kodi reinforce Kodiak's focus on combining technology and field execution to improve performance where it matters most.



SOCIAL

HEALTH, SAFETY AND OPERATIONAL DISCIPLINE

Safety is fundamental to how work is performed and a core expectation across the organization.

It is embedded in how operations are planned, executed, and evaluated in the field. Every employee is responsible for working safely, looking out for one another, and maintaining a high standard of execution. This shared responsibility reflects a culture where safety is personal and protecting people comes first.

Kodiak's approach to health and safety is grounded in operational discipline. Reliable operations begin with a workforce that is prepared, engaged, and empowered to make sound decisions in the moment.

Safety Management System

Kodiak maintains a structured safety management system designed to manage risk and guide how work is performed across operations.

A central component of this system is the Life Critical Risk (LCR) framework, which defines the highest-risk activities and establishes clear expectations for managing those risks in the field.



These elements provide a consistent foundation for planning work, strengthening hazard awareness, and improving decision making.

In 2025, the LCR framework was updated to further strengthen confined space safety, reflecting a continued focus on refining safety practices.

All employees are empowered and expected to exercise stop work authority. This ensures that any individual, regardless of role, can pause work if conditions are unsafe.

Risk Management and Safety Performance

Kodiak's performance reflects how effectively risk is managed in the field.

In 2025, Kodiak achieved:

- **TRIR:** 0.46
- **Lost Time Incident Rate (LTIR):** 0.10
- **Serious Injury and Fatality (SIF) events:** 0
- **Motor Vehicle Incident Rate (MVI):** 0.18

These results reflect strong execution and a continued focus on preventing serious incidents, including the achievement of zero fatalities.

Safety performance is reviewed regularly by leadership and incorporated into operational performance evaluations, reinforcing accountability across the organization.



External Recognition

Kodiak's safety performance and operational discipline were recognized externally in 2025, including recognition as an Avetta ESG Innovator.

Safety Training and Workforce Readiness

Kodiak invests in training to ensure employees are prepared to perform work safely and effectively.

Programs such as BEARS Academy, which provides technical training for gas compression mechanics, support workforce readiness by reinforcing technical capability, hazard recognition, and decision making in the field.

In 2025, Kodiak team members completed approximately 32,633 hours of safety training. This training is designed to strengthen hazard awareness and to prepare employees to execute work to company standards.

Training is aligned with the safety management system and LCR framework, ensuring expectations are clear and consistent across the organization.

Pre-job planning, job safety analyses (JSAs), and regular safety meetings across all locations reinforce safe work practices and support disciplined execution.

Workforce Engagement and Leading Indicators

Kodiak's safety culture is driven by active employee involvement.

Employees are expected to identify and report potential safety issues, provide observations, and take ownership of safe work practices. This approach supports early hazard identification and reinforces accountability.

In 2025, approximately 97% of employees participated in Behavior-Based Safety observations, a program designed for all Kodiak employees to identify and report both safe and unsafe behavior in the field, in the office, and in daily activities.

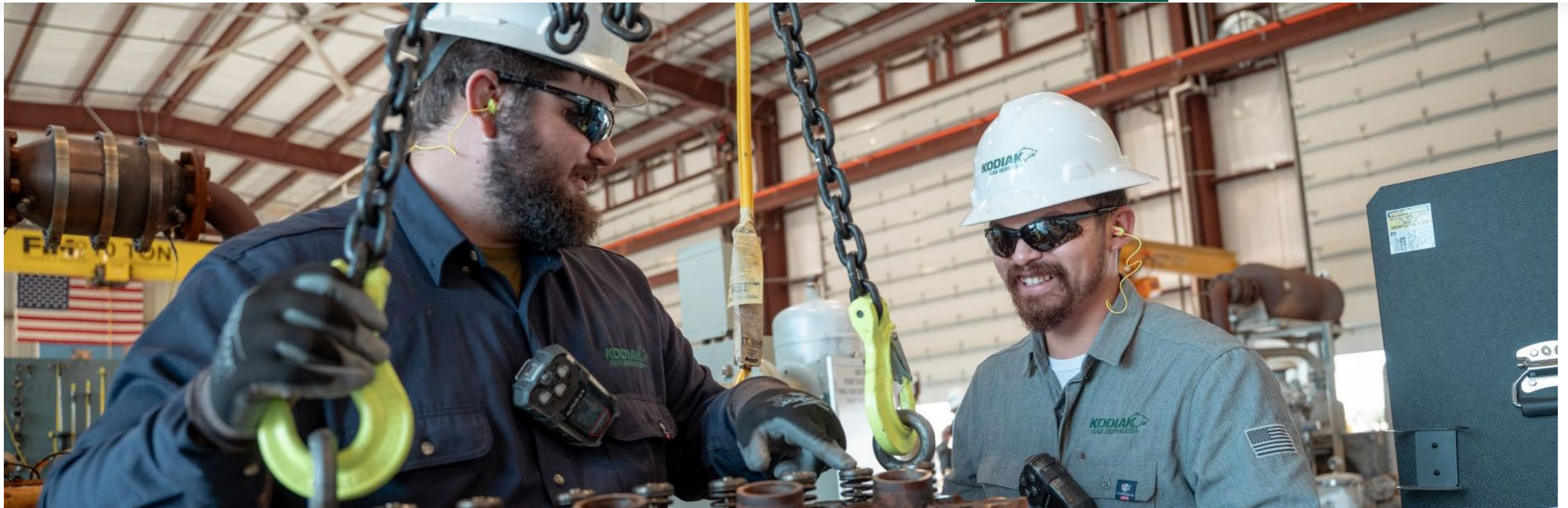
This level of engagement reflects a workforce actively identifying risks and helping prevent incidents before they occur. These leading indicators are a key part of maintaining safe operations.

Technology and Safety

Technology plays an important role in improving safety outcomes.

Telemetry, remote monitoring, and predictive maintenance tools provide visibility into equipment condition and operating performance. These tools enable earlier identification of potential issues and reduce the need for unplanned site visits, including overnight callouts.

By improving planning and reducing reactive work, Kodiak limits exposure to higher-risk situations and supports safer execution.



Fleet Operations and Safety

Fleet operations are a key component of Kodiak's safety approach.

Clear expectations for safe driving are reinforced through training, accountability, and leadership engagement. Employees are expected to operate vehicles responsibly and maintain focus while on the road.

Behavior-Based Safety principles are incorporated into driver training, emphasizing hazard awareness, defensive driving, and personal accountability.

Equipment condition is also closely managed. Units are regularly inspected, and potential hazards are addressed through repair, replacement, or upgrade.

This approach reduces exposure to unsafe conditions and helps maintain safe operations across the fleet.

Leadership Engagement and Safety Governance

Leadership plays a critical role in reinforcing safety expectations.

Leaders are actively engaged with field teams through site visits, coaching, and direct involvement in operations. Every company meeting, not just those in the field, is expected to start with a safety moment. This presence strengthens communication, reinforces expectations, and maintains accountability.

Safety performance is reviewed regularly as part of overall operational performance, providing visibility at all levels of the organization.

Continuous Improvement

Kodiak continuously evaluates its safety programs and practices to identify opportunities for improvement.

This includes reviewing safety processes, operational performance, and employee feedback to ensure alignment with company expectations and evolving operating conditions.

Through this approach, Kodiak maintains a safety program that continues to evolve and improve over time.

Workforce Capability and Training

Kodiak's approach to innovation extends beyond systems and technology to include how employees are trained and prepared to perform in the field.

BEARS Academy remains a foundational component of workforce development at Kodiak, providing hands-on technical training, simulation-based learning, and classroom instruction to prepare employees for field operations.

By providing structured, equipment-based training and simulated scenarios, employees develop technical skills and decision-making capability before performing work in the field. This reduces reliance on on-the-job learning and strengthens execution.

BEARS Academy reinforces standardized work practices, strengthens hazard recognition, and improves the ability to identify and address issues early. These capabilities improve reliability and support safer operations across the fleet.

Innovation Supporting Growth

Kodiak continues to expand its capabilities to support evolving customer needs and increasing energy demand.

The company is investing in infrastructure and capabilities, including distributed power solutions, to support dependable, on-site energy requirements. This includes growing demand associated with data center development and other power-intensive applications.

This expansion reflects a focus on combining operational expertise with technology and infrastructure to deliver reliable, scalable solutions.

Innovation in Practice

Innovation is measured by its impact on performance.

By integrating data, systems, tools, and workforce capability into daily operations, Kodiak improves reliability, reduces unplanned events, and enhances performance across the fleet.

People and Culture

Kodiak builds and maintains a workforce capable of delivering safe, consistent, and reliable operations at scale.

Across the organization, employees are responsible for operating, maintaining, and supporting the company's compression fleet. A well-trained and aligned workforce is essential to maintaining safe operations, reducing risk, and executing effectively across the business.

Kodiak's approach to people and culture is focused on building capability, strengthening leadership, and developing a workforce that can support long-term operational performance.

Workforce Overview

Kodiak monitors workforce metrics, including turnover, training participation, and internal mobility, to support workforce stability and long-term capability development.

■ Total headcount: 1,284

Kodiak's turnover rate is below typical industry ranges, reflecting a stable workforce and a focus on retention. Developing and advancing employees internally helps maintain continuity across operations and strengthens long-term workforce capability.



Building Capability and Technical Expertise

Kodiak invests in workforce development to build technical capability and support consistent execution across operations.

In 2025, Kodiak delivered approximately 92,342 hours of training across the organization, averaging approximately 57 hours per employee, exceeding the company's internal target of 40 hours per employee.

Training spans technical, safety, compliance, and leadership development and is aligned with operational requirements across the business. A trained workforce strengthens capability across operations.

Kodiak's development programs are designed to support employees at different stages of their careers and create a structured pipeline of talent across the organization.



- **BEARS Academy** provides hands-on technical training that reinforces operating standards and prepares employees to perform work safely and consistently in the field. In 2025, approximately 290 employees participated, with 255 completing the full program. This structured approach improves technical capability and reduces early-stage turnover by preparing employees before they enter field operations.



- **IGNITE Development Program** encourages early career development through technical school partnerships, providing a pipeline of entry-level field talent.
- **AMPED** is a rotational development program designed for early-career professionals. The program provides structured exposure across operations, field execution, engineering, commercial functions, and corporate support roles, developing a pipeline of future leaders with a comprehensive understanding of the business.
- **Master Mechanic Program** provides a dedicated career path for experienced technicians who choose to remain in technical roles.

Together, these programs build a more capable workforce, improve consistency in how work is performed, and support long-term operational performance.

Leadership Development and Talent Management

Kodiak continues to invest in leadership development through Kodiak University, a multi-year partnership with Texas A&M University focused on strengthening leadership capability, decision making, and organizational alignment across operations.

Kodiak's broader talent management system includes performance reviews, succession planning, and structured talent assessments.

This approach supports internal mobility, strengthens leadership pipelines, and ensures the organization is prepared to meet future operational demands.

Workforce Engagement and Retention

Kodiak's culture is reinforced through active employee engagement and a focus on connection across the workforce. Kodiak uses employee engagement surveys, including Gallup, to better understand workforce needs, strengthen leadership accountability, and identify opportunities to improve employee experience, retention, and organizational effectiveness.

Employee resource groups and engagement initiatives support retention, strengthen relationships, and contribute to a more connected organization.

- **K-VETS** supports veterans across the organization through community service and shared experience.
- **K-Kore** provides opportunities for networking, mentorship, and professional development for women across Kodiak.

These initiatives support employee engagement, strengthen retention, and contribute to a workforce that is aligned, supported, and committed to operational success.

Supporting Our Employees

Kodiak provides benefits and resources designed to support employee well-being, financial stability, and long-term career development.

The company offers healthcare coverage, retirement savings programs, and employee assistance resources to support employees and their families. Additional programs, including Genomic Life, provide employees with tools and information to better understand and manage their health.

In 2025, Kodiak introduced an Employee Stock Purchase Plan (ESPP), providing employees with the opportunity to purchase company stock through after-tax payroll contributions at a discounted rate. The program expands employee ownership and strengthens alignment with long-term company performance.

Together, these offerings support a stable workforce, reinforce financial well-being, and reflect Kodiak's commitment to its employees.

Leadership Engagement and Accountability

Leadership plays a critical role in reinforcing expectations and supporting execution across the organization.

Leaders remain actively engaged with field teams through site visits, coaching, and direct involvement in operations. This engagement strengthens alignment between expectations and performance and reinforces a culture of accountability.

Employees are expected to take ownership of their work, support one another, and maintain a consistent standard of execution across all operations.

Culture in Practice

Kodiak's culture is shaped by the Greenprint, its framework for how the company operates, and by an upside-down pyramid leadership model that emphasizes supporting employees closest to the work. Together, they guide how work gets done every day.

This approach helps build a disciplined, well-trained workforce that supports safe, consistent, and reliable operations across the fleet.

Kodiak's people bring this culture to life through how they work, lead, and support one another.

External Recognition

Kodiak's commitment to building a strong workplace culture has been recognized through multiple independent workplace awards.

In 2025, the company earned national recognition as a USA TODAY Top Workplace and continued to be recognized as a Top Workplace across several operating regions, including Houston, Oklahoma, New Mexico, and the Great Plains. Kodiak was also recognized as one of America's Top 100 Most Loved Workplaces and earned Most Loved Workplace certifications, including recognition for Career Advancement. These honors reflect the company's continued investment in its people, leadership, and workplace culture..



Community Impact and Kodiak Cares Foundation

Kodiak's approach to community impact is grounded in its people and the communities where they live and work.

Through the Kodiak Cares Foundation (Kodiak Cares), the company takes a structured approach to community investment, combining financial support, employee engagement, and long-term partnerships to create meaningful impact across its operating regions. Founded in 2021, Kodiak Cares was established to support employees, strengthen communities, and contribute to causes that align with the company's values. Kodiak Cares is governed by an employee board that helps guide its giving and community impact efforts.



Kodiak Cares in Action

Kodiak Cares brings together charitable giving, employee engagement, and support programs under a unified platform.

Its efforts are focused on key areas, including children and health, education, conservation, veteran support and community assistance, reflecting both company priorities and employee involvement.

Core programs include:

- **Kodiak Gives Back**, which provides grants, supports volunteerism, and strengthens community partnerships.
- **Scholarship Assistance Fund**, supporting educational advancement for Kodiak employees and their families.
- **Employee Assistance Fund**, providing financial support to employees during times of hardship.

This structure allows Kodiak to deliver consistent, scalable support across its operating regions while maintaining strong employee involvement.

Employees play an active role in these efforts, including nominating organizations and participating in community initiatives. This approach ensures that giving remains connected to the communities where Kodiak operates and aligns with the priorities of its workforce.

2025 Community Impact

In 2025, Kodiak Cares expanded its impact across the communities where employees live and work.

Through Kodiak Gives Back, the foundation provided 135 grants to more than 60 nonprofit organizations, contributing approximately \$2.0 million in support of community initiatives.

Additional programs included \$80,000 in scholarship assistance and \$90,000 provided through the Employee Assistance Fund, offering direct support to employees and their families during times of need.

Employees actively participate in volunteer efforts, charitable events, and community initiatives across all operating regions. Kodiak also organizes service initiatives, including Day of Service projects, which bring employees together to support local organizations through hands-on work.

In 2025, employees contributed nearly 3,000 volunteer hours across community initiatives, demonstrating a continued commitment to supporting communities through both time and resources.

Partnerships That Make a Difference

Kodiak Cares supports organizations and initiatives that align with its core focus areas and commitment to long-term impact.

In 2025, the foundation continued fulfilling its \$1 million commitment to Sky High for Kids, supporting pediatric cancer research and programs that assist families facing serious illness. Kodiak Cares

also maintained its partnership with Ducks Unlimited, supporting conservation and habitat restoration efforts across key operating regions.

Kodiak Cares supports these partnerships through both financial contributions and active employee engagement. Employees participate in hands-on initiatives, including supporting Make-A-Wish, serving military personnel through Warriors Table, and participating in service projects with organizations such as Santa Maria Hostel.

Kodiak Cares was recognized by Santa Maria Hostel as its 2025 Corporate Partner of the Year, reflecting ongoing financial support, volunteer engagement, and community involvement in recovery and rehabilitation programs for women and families.

These partnerships reflect a focus on sustained relationships and meaningful impact over time.

Community Impact in Practice

Community impact at Kodiak is an extension of its culture and values.

Through Kodiak Cares and the collective efforts of its employees, the company continues to support the communities where it operates, build long-term relationships, and contribute to causes that make a meaningful difference.

GOVERNANCE

DISCIPLINED GOVERNANCE AND OVERSIGHT



GOVERNANCE OVERVIEW

Kodiak's Board of Directors, through its Nominating, Governance and Sustainability Committee, provides oversight of the company's sustainability objectives. The Board, through its Personnel and Compensation Committee, provides oversight of human capital management. Management regularly reports on these matters to support alignment among operational execution, risk management, and long-term strategy.

Management also provides regular updates to the Board of Directors and its committees on key risk areas, including operational, environmental, and cybersecurity matters.

Kodiak maintains a governance framework grounded in accountability, transparency, and disciplined oversight.

Governance at Kodiak supports long-term value creation by aligning Board oversight, executive leadership, and operational execution with risk management, regulatory expectations, and shareholder interests. The Board actively oversees strategy, capital allocation, risk, and performance through defined structures that support independent judgment and informed decision making.

Governance Highlights

Kodiak's governance practices reflect a commitment to strong oversight and alignment with shareholders.

- Majority independent Board of Directors
- Fully independent Audit and Risk, Personnel and Compensation, and Nominating, Governance and Sustainability Committees

- Separate Chair and Chief Executive Officer roles
- Annual Board, committee, and director evaluations
- Stock ownership guidelines for executives and non-employee directors
- Prohibition on hedging and pledging transactions
- Clawback policy aligned with regulatory requirements
- Majority voting standard for director elections, as approved by Kodiak's Board and ratified by shareholders at the 2026 annual meeting
- Active shareholder engagement program
- Board declassification in process, as approved by Kodiak's Board and ratified by shareholders at the 2026 annual meeting

In 2025, the Board held 13 meetings. The Audit and Risk Committee, Personnel and Compensation Committee, and Nominating, Governance and Sustainability Committee held 13, five, and six meetings, respectively. Independent directors met in executive session at least ten times during the year.

Board Structure and Committees

Kodiak's Board operates through three standing committees, each composed entirely of independent directors. This structure supports focused oversight and clear accountability across key areas of the business.

The Audit and Risk Committee oversees financial reporting, internal controls, enterprise risk management, legal and regulatory compliance, and cybersecurity risk. The Nominating, Governance and Sustainability Committee oversees Board composition, governance practices, sustainability strategy, and director nominations, supporting alignment with stakeholder expectations and disclosure practices. The Personnel and Compensation Committee oversees executive compensation and human capital management, supporting alignment between pay, performance, and long-term shareholder value.

Board Composition and Ongoing Evaluation

Kodiak's Board is composed of individuals with experience aligned with the company's business and strategic priorities. Director expertise spans energy and midstream operations, financial and capital markets, accounting and audit, regulatory and legal matters, risk management, technology and cybersecurity, and human capital management.

The Board regularly evaluates its composition to ensure alignment with business needs, industry conditions, and shareholder expectations. Annual evaluations of the Board, its committees, and individual directors support continued effectiveness, refreshment, and succession planning.

Risk and Sustainability Oversight

Sustainability-related risks, including operational, environmental, and regulatory considerations, are integrated into Kodiak's enterprise risk management processes and evaluated alongside financial and operational risks.

Oversight of sustainability and enterprise risk is integrated into Kodiak's governance framework.

The Board, through the Nominating, Governance and Sustainability Committee, oversees sustainability strategy, disclosures, and alignment with stakeholder expectations. At the same time, enterprise risk management is incorporated into strategic planning and operational decision making, with regular review of operational, financial, regulatory, and cybersecurity risks.

This integrated approach strengthens the alignment between governance, operations, and long-term performance.

Ethics, Compliance, and Accountability

Kodiak maintains a strong control environment supported by policies, training, and accountability mechanisms designed to promote ethical conduct and regulatory compliance.

The company's Code of Conduct and related policies establish clear expectations for employees and leadership. Confidential reporting channels support a culture of accountability and responsible decision making across the organization.

Executive Compensation and Alignment

Kodiak's executive compensation programs are designed to attract and retain key executives, motivate them to achieve our short-term and long-term objectives without exposing us to excessive or unnecessary risk, and align their interest with our shareholders' interests.

Compensation structures incorporate a balance of short-term and long-term incentives tied to financial performance, operational execution, and strategic objectives, reinforcing accountability and alignment with shareholder interests.

Shareholder Rights and Governance Evolution

Kodiak maintains an active shareholder engagement program and continues to evaluate its governance practices in light of shareholder feedback, applicable public company requirements, and evolving governance standards.

Governance in Practice

Kodiak's governance extends beyond structure and policy. Clear oversight, disciplined execution, and defined accountability support a company focused on operational performance, effective risk management, and long-term value creation.

Cybersecurity and Data Protection

Cybersecurity is a critical component of Kodiak's operational integrity and risk management framework.

As a provider of essential compression services supporting energy infrastructure, operational continuity depends on the security and availability of systems, data, and operational technology. Cybersecurity is managed as both a governance priority and an operational requirement.

Governance and Oversight

Cybersecurity risk management is integrated into Kodiak's enterprise risk management framework and is discussed with the Board of Directors and the Audit and Risk Committee.

The Audit and Risk Committee receives updates on cyber risk exposures, monitoring activities, and mitigation efforts, providing visibility into evolving risks and program effectiveness.

Cybersecurity Program

Kodiak maintains a structured, risk-based cybersecurity program designed to identify, assess, manage, mitigate and respond to cyber threats, including risks associated with third-party vendors and suppliers.

The program is aligned with recognized industry standards, including the National Institute of Standards and Technology Cybersecurity Framework and ISO 27001 Information Security Management System requirements.





Management and Operational Execution

Kodiak's cybersecurity program is led by the Chief Information Officer, who is responsible for cybersecurity strategy, risk management, and program execution.

The internal cybersecurity team is supported by external cybersecurity firms and an outsourced cyber security operations center, providing continuous monitoring and supporting incident investigation and response activities.

Risk Management and Resilience

Kodiak conducts ongoing monitoring and periodic risk assessments to identify potential threats and strengthen system resilience.

In 2025:

- No cybersecurity incidents resulted in operational disruption or material impact
- The company completed an annual penetration test to evaluate system vulnerabilities
- A cybersecurity tabletop exercise was conducted to test incident response readiness

These activities reinforce readiness and strengthen the company's ability to respond to evolving cyber risks.

Training and Awareness

Employees play an important role in maintaining cybersecurity.

Kodiak reinforces workforce awareness through:

- cybersecurity training programs
- ongoing communication regarding emerging risks
- periodic phishing simulations

These efforts promote vigilance and responsible data handling across the organization.

Third-Party Risk Management

Cybersecurity considerations are incorporated into the evaluation and oversight of third-party service providers.

Kodiak engages external cybersecurity partners and evaluates vendor relationships with a focus on data protection, system security, and monitoring capabilities. Contractual expectations establish appropriate safeguards across the operating environment.

Continuous Improvement

Kodiak continues to evaluate and enhance its cybersecurity capabilities as the threat landscape evolves.

This includes:

- periodic assessment of program effectiveness
- engagement with external expertise
- continued investment in systems, processes, and training

Through this approach, Kodiak maintains a cybersecurity program that supports safe, reliable, and resilient operations.

Kodiak's cybersecurity program protects the systems, data, and operational technology that enable safe, efficient, and reliable operations across the fleet.

APPENDIX

ENVIRONMENTAL APPROACH AND REPORTING BOUNDARY





This section defines the boundary of Kodiak's environmental disclosures and provides context for how emissions are reported within the company's business model.

Kodiak owns and operates compression equipment deployed at customer sites; however, the underlying facilities and associated air permits are owned and maintained by customers.

Emissions from compression units are reported by customers under their respective regulatory frameworks. As a result, Kodiak's direct greenhouse gas emissions are primarily limited to company-owned vehicles and office operations.

Kodiak maintains limited permitted operations associated with company-controlled activities, such as a paint booth, which are limited in scope and managed in compliance with applicable regulatory requirements.

While this defines the company's reporting boundary, it does not fully represent operational impact. Equipment reliability, maintenance practices, and operational discipline influence runtime stability, efficiency, and the occurrence of unplanned events.

For this reason, Kodiak's environmental approach focuses on operational discipline, equipment reliability, reduction of unplanned events, and fleet modernization and electrification.

The SASB index that follows is intended to provide additional context for investors and other stakeholders regarding Kodiak's reporting boundary and the metrics most relevant to the business.

Report Metric	Unit	2025 Value/ Response	SASB Services	SASB Midstream	GRI Code
Financial					
Revenue	s million USD	\$1,308.1			201-1
Environmental					
Emissions					
Scope 1 Emissions Total	Metric tons CO ₂ e	36,056	EM-MD-110a.1		305-1
Scope 1 Emissions Intensity	Metric tons CO ₂ e/ s million revenue	27.6			305-4
Scope 1 Emissions: Carbon Dioxide	Metric tons CO ₂	35,177			305-1
Scope 1 Emissions: Methane	Metric tons CH ₄	129			305-1
Scope 1 Emissions: Nitrous Oxide	Metric tons N ₂ O	750			305-1
Percent Methane	Percentage (%)	0.40%	EM-MD-110a.1		
Scope 2 Emissions Total (Location-Based)	Metric tons CO ₂ e	1,104			305-2
Scope 2 Emissions Intensity	Metric tons CO ₂ e/ s million revenue	0.8			305-4
Scope 2 Emissions: Carbon Dioxide (Location-Based)	Metric tons CO ₂	1,099			305-2
Scope 2 Emissions: Methane (Location-Based)	Metric tons CH ₄	3			305-2
Scope 2 Emissions: Nitrous Oxide (Location-Based)	Metric tons N ₂ O	2			305-2
Scope 2 Emissions Total (Market-Based)	Metric tons CO ₂ e	0			305-2
Total GHG Emissions Scope 1 + Scope 2	Metric tons CO ₂ e	37,160			
Total GHG Intensity	Metric tons CO ₂ e/ s million revenue	28.4			305-4

Report Metric	Unit	2025 Value/ Response	SASB Services	SASB Midstream	GRI Code
Energy					
Total Energy Consumed	GJ	156,306	302-1		
Energy Intensity	GJ / \$ million revenue	119.5	302-3		
Renewable Energy Used	GJ	4,302			
Renewable Energy Used As % of Electricity	Percentage (%)	43.3%			
Electricity Used Total	GJ	9,935		302-1	
Electricity as % of Total Energy	Percentage (%)	6.4%			
Total Fuel Consumed	GJ	146,371	EM-SV-110a.1		
Diesel Consumed	GJ	81,900	EM-SV-110a.1		
Gasoline Consumed	GJ	64,471	EM-SV-110a.1		
Natural Gas Consumed	GJ	0	EM-SV-110a.1		
Percent of Fuel Used in On-Road Equipment	Percentage (%)	100.0%	EM-SV-110a.1		
Percent of Fuel Used in Off-Road Equipment	Percentage (%)	Not applicable	EM-SV-110a.1		
Environmental Impact					
Land Owned, Leased, or Operated Within Areas of Protected Conservation Status or Endangered Species Habitat	Percentage (%)	0.0%	EM-MD-160a.2		
Number of Hydrocarbon Spills	Number	0	EM-MD-160a.4		
Amount of Hydrocarbon Spills	Barrels	0	EM-MD-160a.4		
Volume of Spills Recovered	Barrels	0	EM-MD-160a.4		

Report Metric	Unit	2025 Value/ Response	SASB Services	SASB Midstream	GRI Code
Waste					
Waste Total	Metric tons	331			306-3
Waste Recycled	Percentage (%)	89%			
Waste Management Approach	Narrative	Kodiak uses approved vendors for the storage, transport, and disposal of operational waste generated through maintenance and field activities.			306-2
Water					
Total Water Use	Thousand cubic meters	7.2	EM-SV-140a.1		
Social					
Health and Safety					
Employee Total Recordable Incident Rate (TRIR)	Per 200,000 hours worked	0.46	EM-SV-320a.1		403-9
Employee Lost Time Incident Rate (LTIR)	Per 200,000 hours worked	0.10	EM-SV-320a.1		403-9
Employee Near Miss Frequency Rate (NMFR)	Per 200,000 hours worked	1.32	EM-SV-320a.1		403-9
Employee Fatalities	Number	0	EM-SV-320a.1		403-9
Employee Occupational Illness Rate	Rate	0	EM-SV-320a.1		

Report Metric	Unit	2025 Value/ Response	SASB Services	SASB Midstream	GRI Code
Total Preventable Vehicle Incident Rate	Rate	0.18	EM-SV-320a.1		
Accident Releases	Number	0		EM-MD-540a.3	
Non-Accident Releases (NARS)	Number	0		EM-MD-540a.3	
Total EH&S Training Hours	Hours	32,633			403-5
Human Capital Management					
Average Training Hours	Hours per employee	57	401-1		
Total Training Hours	Hours	92,342			404-1
Participation in Employee Engagement Survey	Percentage (%)	100%			
Total Employees	Number	1,284			2-7
Diversity and Inclusion					
Women Employees	Percentage (%)	9.64%			405-1
Women Managers	Percentage (%)	18.18%			405-1
Minority Group Employees	Percentage (%)	34.29%			405-1
Minority Group Managers	Percentage (%)	26.48%			405-1

Report Metric	Unit	2025 Value/ Response	SASB Services	SASB Midstream	GRI Code
Governance					
Board Composition					
Number of Directors	Number	9	2-9		
Board of Directors Who Are Women	Percentage (%)	33.3%	2-9		
Board of Directors Who Are Men	Percentage (%)	66.7%	2-9		
Independent Board of Directors	Percentage (%)	88.9%	2-9		
Racial or Ethnic Minorities on Board of Directors	Percentage (%)	22.20%	2-9		
Cybersecurity					
Amount of Fines for Data Breaches	S million USD	0			418-1

Cautionary Note Regarding Forward-Looking Statements

This Sustainability Report contains, and our officers and representatives may from time to time make, “forward-looking statements” within the meaning of the safe harbor provisions of the U.S. Private Securities Litigation Reform Act of 1995.

Forward-looking statements are not historical facts and are based on our current beliefs, expectations, and assumptions regarding future events.

Forward-looking statements may be identified by the use of words such as “anticipate,” “intend,” “plan,” “goal,” “seek,” “believe,” “estimate,” “expect,” “strategy,” “future,” “likely,” “may,” “should,” “will,” and similar expressions.

Examples of forward-looking statements in this report include, among others, statements regarding: expected operating and financial performance, industry conditions and demand for natural gas compression services, our ability to maintain and grow our market position, capital allocation and investment priorities, operational performance, including fleet utilization and maintenance strategies, customer demand and retention, and sustainability-related initiatives, including environmental performance and operational efficiency.

Because forward-looking statements relate to the future, they are subject to inherent risks, uncertainties, and changes in circumstances that are difficult to predict and many of which are outside of our control. Although we believe the expectations reflected in our forward-looking statements are reasonable and are based on reasonable assumptions, no assurance can be given that

such assumptions are accurate or that any of such expectations will be achieved (in full or at all) or will prove to have been correct. Actual results may differ materially from those expressed or implied in these forward-looking statements.

Factors that could cause actual results to differ materially include, among others: changes in demand for natural gas and oil, volatility in commodity prices, the financial condition and activity levels of our customers, nonpayment or nonperformance by customers, suppliers, or vendors, competitive pressures and market dynamics, changes in applicable laws, regulations, or regulatory interpretations, environmental and safety requirements, availability and cost of capital, operational risks, including equipment performance, failures, and maintenance requirements, cybersecurity risks and threats to information systems, and general economic, geopolitical, and market conditions.

Additional information regarding these risks and other factors is included in our most recent Annual Report on Form 10-K and subsequent filings with the U.S. Securities and Exchange Commission.

Sustainability and ESG-Related Statements

Statements in this report regarding sustainability, environmental performance, and other ESG-related matters may be based on evolving standards, internal methodologies, and assumptions that are subject to change.

Metrics, estimates, and targets may vary over time as data quality improves, processes evolve, and industry practices develop. These statements are not guarantees of future performance, and no

assurance can be given that any sustainability-related goals, targets, or initiatives will be achieved within expected timeframes or at all.

Our sustainability-related policies, procedures, and initiatives may change, be refined, or be discontinued based on cost, feasibility, regulatory developments, or other business considerations.

Additional Disclosures

Any forward-looking statement made in this Sustainability Report speaks only as of the date of this report and is based on information currently available to us. Except as required by applicable law, we undertake no obligation to publicly update or revise any forward-looking statements as a result of new information, future developments, or otherwise.

This Sustainability Report may include information obtained from third-party sources or public data that has not been independently verified by us. No representation or warranty is made as to the accuracy or completeness of such information.

Nothing in this report constitutes investment, legal, tax, or other advice, nor should it be relied upon in making investment or other decisions.

Unless otherwise provided, the information contained in this report is expressly not incorporated by reference into any filing of the Company made with the U.S. Securities and Exchange Commission or any other filing, report, application, or statement made by us to any federal, state, tribal, or local governmental authority.

