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USAC.N - Q1 2026 USA Compression Partners LP Earnings Call

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PRESENTATION

Operator

Good morning. Welcome to USA Compression Partners' First Quarter 2026 Earnings Conference Call.

(Operator Instructions)

Thank you. And this conference is being recorded today, May 5th, 2026.

I would now like to turn the call over to Clint Green, President and CEO. You may begin.

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Good morning, everyone, and thank you for joining us. With me today is Chris Paulson, Senior Vice President and CFO Chris Wauson, Senior Vice President and COO. And other members of our leadership team. This morning, we released our operational and financial results for quarter ending March 31st, 2026.

Today's call will contain forward-looking statements based on our current beliefs and certain non-GAAP measures. Please refer to our earnings release and SEC filings for reconciliations and definitions of non-GAAP measures and related risk factors. As we discussed performance, please note that JW acquisition closed on January and therefore, Q1 earnings excludes the impact of revenues and expenses for JW Power for the first 11 days of the quarter.

Before we get into the quarter, I want to take a moment to recognize our team on safety.

Our people go to work in the field every day, working around complex equipment, driving millions of miles a month, and the way they return to their family matters more than any financial metric we report. In 2025, our combined TR/IR finished at a 0.39, a 50% reduction from 2024, and well below the BLS industry average of 0.70, a benchmark we have now beaten for 12 consecutive years. We are proud of these results, and we remain committed to continuous improvement.

Moving to the quarter, which included two integrations that established upward momentum for the company. First, we kicked off the integration of JW Power at the time when horsepower lead times continued to extend customer discussions commenced immediately upon closing, starting the process of onboarding new customers to the USAFE compression platform.

As of early March, we have integrated the combined operations organization and established a new reporting structure. Second, on February 1st, our integration of legacy USA compression data into a new ERP system was completed.

Our respective integration teams work long hours to enable a smooth transition of both, and I can't be more appreciative of their efforts. Throughout it all, we have maintained our operational momentum while delivering DCF and leverage metrics that show meaningful year-over-year improvement to our unitholders.

The company is now broadly diversified across every major basin, horsepower class, and customer type. In the last few months, we have contracted over 90% of our 2026 horsepower, which will more than double the new horsepower deployed in 2025.

Additionally, we have continued the momentum in our small horsepower class, with utilization up nearly 10% year-over-year.

The introduction of JW Power's manufacturing capabilities is enabling us to manage a dynamic compression market differently than in the past. Certain new engine lead times have recently tripled from 50 weeks to approximately 150 weeks. And while historically we might hesitate to commit to the full horsepower cost that far in advance, we are now able to directly acquire highly marketable engines with optionality to package for our own internal contract compression needs or future resale to third parties.

Engine costs represent approximately 25% to 40% of the total skid cost, with just a fraction of that cost provided as a deposit.

In the event of an unexpected contract compression market shift over the next several years, we believe we could also divest those engines for other use cases, further reducing any unlikely downside exposure.

Additionally, the diversity of our manufactured compression products, including mid-size, large horsepower, electric and high-pressure gas. Gas lift supports more competitive pricing for our customers, while enabling us to adapt to the ever-changing marketplace.

So far, the oil-directed rig count remains flat this year, but producers are showing more optimism looking out over a 12-month horizon than we have seen for some time, reflecting a much-improved commodity backdrop.

The 12-month oil strip has significantly lagged physical spot prices and arguably is underpriced for an immediate and permanent ceasefire, much less a long-term.

We believe spot natural gas prices do not reflect the LNG risk associated with the Strait of Hormuz.

Finally, Waha pricing is anticipated to materially improve with export capacities increasing in Q4 of 2026.

I will now turn the call over to Chris Wauson, our Chief Operating Officer, who will provide additional insights to our current operations and our out-year growth plan.

Christopher Wauson - *USA Compression Partners LLC - Chief Operating Officer*

Thanks, Clint. As of today, the operations and commercial organizations have been integrated with both JW employees and legacy USA employees under new reporting structures consistent with a best-in-class approach.

The longer-term result will be streamlined route optimization, customer contracts, vendors, inventory, safety protocols, and systems data.

As discussed in the prior quarter, we expect approximately $10 million to $20 million of annual run rate synergies by year-end 2027, and we are still tracking towards those estimates.

The current new compression lead times have presented a new challenge for near-term business continuity and long-term planning for both contract compression and manufacturing. As a result, we have already placed orders for engines and packaged components for 2027 and engines for 2028 and a portion of 2029.

Packaged component lead times remain well inside of engine lead times, but we'll continue to monitor and place these orders when needed.

These advanced planning efforts should enable new contract compression growth to stay largely consistent with 2026, in excess of 100,000 horsepower each year. As far as our manufacturing book is concerned, we have some specialty horsepower slated for refill, but the vast majority is expected to go into our fleet.

Our 2028 orders are nearly entirely weighted to large 3,600 series engines, which are the most desired by our compression customers while also having substantial optionality for sale should the market shift.

We continue to have robust conversations across our diverse customer portfolio, and as Clint mentioned, we have contracted more than 90% of nearly 110,000 new horsepower expected to be added to the fleet in 2026, and are presently. Middle of multi-year strategic planning discussions with some of our strongest customers to shore up our 2027 book.

Notably, we experienced lower churn rates than expected in Q1, which is a reflection of the tightness in the current market. This backdrop, coupled with the idle units acquired from JW, positions us for outside horsepower growth in the back half of the year and into early 2027.

Finally, while oil prices have moved up significantly in the last month, we are focused on minimizing cost increases tied to lubricants. If oil prices were to remain at current levels, we would expect much of that increase to show up in the second-half of the year as our lubricant contracts renew.

I will now turn the call over to Chris Paulson to discuss our financial results in detail.

Christopher Paulsen - *USA Compression Partners LLC - Vice President, Chief Financial Officer and Treasurer*

Thanks, Chris. For basis of comparison, our quarter and year-ago financials exclude the benefit of JW that closed on January 12th.

For Q1 2026, our income statement reflects the results of JW's contributions for 79 days in the quarter, and therefore our non-GAAP financial numbers, including EBITDA and DCF, reflect the same.

By contrast, our non-GAAP operating metrics tied to horsepower, including utilization, average revenue per horsepower per month, and average active horsepower are calculated based on month-end, and therefore fully reflect JW's horsepower contribution for the quarter.

As we highlighted in our December 1st deal announcement, while JW provides meaningful near-term accretion and immediate deleveraging, the company in aggregate also has lower gross margin than our legacy asset base, in part due to the manufacturing and AMS operations that contributed approximately 10% of legacy EBITDA.

Turning the page to Q1 results, we increased pricing to an all-time high, averaging $22.73 per horsepower, a 5% increase in sequential quarters, and an 8% increase compared to a year ago.

Average active horsepower ended at $4.438 million. Our first-quarter adjusted gross margins came in at 64.4%.

Regarding the consolidated financial results, our first quarter 2026 net income was $38.3 million, operating income was $91.4 million, net cash provided by operating activities was $86.1 million and cash interest expense net was $47.1 million.

Our leverage ratio at the end of the first quarter was 3.74 times.

Turning to operational results, our total fleet horsepower at the end of the quarter was approximately 4.931 million horsepower, adding approximately 1.037 million horsepower as compared to the prior quarter, largely tied to the JW acquisition.

Our average utilization for the first quarter was 91.9%, a decrease compared to the prior quarter after incorporating JW.

First quarter 2026 expansion capital expenditures were $26.4 million, and our maintenance capital expenditures were $9.2 million.

Expansion capital spending in Q1 primarily consisted of new units, while maintenance capital activity was deferred for a few weeks in February due to the implementation of SAP on February 1st.

For the remainder of the year, most growth capital will be focused on new horsepower and reconfigurations, while maintenance capital will normalize towards our full-year projections.

We continue to maintain our full-year adjusted EBITDA range of $770 million to $800 million, distributable cash flow range of $480 million to $510 million, maintenance capital range of $60 million to $70 million, and expansion capital range of $230 million to $250 million.

As Chris Wauson noted, we are nearly fully contracted for 2026 and are placing advanced orders to maintain full utilization of our manufacturing complex for several years.

As stated in February, our near-term target is to maintain a 3.75 times debt-to-EBITDA, and we made significant progress toward this goal in Q1.

While we hit this target for the quarter, we anticipate it will tick higher in Q2 as we take delivery of new horsepower, the trend back lower by year-end.

The energy high-yield market has remained open and very resilient throughout the Iran conflict. Our improved leverage metrics put the company in a strong position to access capital markets later this year to the extent we want to provide more consistency in our debt tranche sizing and duration.

This quarter was a whirlwind of activity for our operations and finance teams as we implemented new systems with new assets and new faces. The execution was nothing short of exceptional as we laid the foundation for more acquisition opportunities to come.

We will stay disciplined and evaluate opportunities that fit with our financial goals and core competencies.

In the near term, our business will be improved through a gross margin push, working to improve structural cost and the efficiency of the JW organization in the face of an inflationary oil environment.

And with that, I'll turn the call back to Clint for concluding remarks.

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Thanks, Chris. This business demands that we stay close to our customers every single day, understanding their needs, anticipating where they're headed, and making sure we're ready when they call. The discipline doesn't change with the commodity cycle. What is changing is the opportunity in front of us, the demand for natural gas, both to move it and to power the infrastructure around it, continues to grow, and we feel very good about our position in that story. The relationships we've built with our suppliers.

Aligned with our manufacturing capabilities, gives us a real advantage in an environment where equipment lead times remain extended.

We intend to use that advantage. We're bullish on contract compression overall, and I'm excited about where we're headed. I will now open up the call to questions.

QUESTIONS AND ANSWERS

Operator

Thank you.

(Operator Instructions)

Nate Pendelson, Texas Capital. Please go ahead.

Nate Pendleton - *Texas Capital - Analyst*

Good morning, and congrats on the record results.

So you had a really strong quarter across the board. Can you talk for a moment how this compared to your internal expectations following the JW integration and then maybe your decision to keep the guidance the same here in lieu of those results?

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Yeah, Nate, thank you for that.

Yeah, I mean, I feel like we're in line with where we thought we would be. As we put this model together late last year and decided to move forward with the acquisition.

We're working through -- we've already worked through some of the operational changes and the structure.

We're working hard on, our routing and ways to save going forward. But we're -- overall, we're really happy with where we're at in the process and excited about where we're headed by year-end and then through the future.

Nate Pendleton - *Texas Capital - Analyst*

Got it. Thanks, Clint. And there's my follow-up maybe for Chris. I believe last call you talked about looking for distribution coverage expanding beyond the 1.6 times marker and sparking some conversations. With coverage now over 1.7 times, can you talk about how you weigh adding to an already strong distribution versus other uses of capital?

Christopher Wauson - *USA Compression Partners LLC - Chief Operating Officer*

Sure, Nate.

Just before that, just to add a little bit to Clint's comments as it relates to JW transactions as well. I think we mentioned this before, but I think we've been generally very pleased with the sophistication of their operations. As we start to embark upon another SAP implementation for their operations in particular, we're seeing some things that we want to adopt in our own, which is fantastic, and which is probably expected from a company that's been doing it for 60 years. So. There are areas of manufacturing that are done exceptionally well, areas as it relates to customer interaction and outreach that have been done exceptionally well, the retail side of the business. So I'll just point to that as well.

But as it relates to your distribution question, we were pleased to see that number take up to 1.72 times.

Part of that relates to the fact that we kind of had a bit of a partial quarter.

We ultimately had lower maintenance expenditures. That was part -- that was due to the SAP implementation itself. We did a couple of weeks of paper stacking as it related to the transition.

We really had kind of a quiet period for about a week and a half where we really told our folks to limit their maintenance expenditures. And so as a result, our maintenance expenditures were down, and therefore DCF ticked up. Now, that being said, we also did not account for the DCF over those 11 days while fully accounting for maintenance capital. So I think net-net, we feel really good about setting up for a durable and really a disciplined approach to distribution over time and our distribution policy.

We want to see something sustained for a period of time and continue to hit both our financial metrics in terms of leverage, but also continue to see and repeat kind of these type of numbers before I think we would begin to approach the conversation about any change in distribution policy.

Nate Pendleton - *Texas Capital - Analyst*

Understood. I really appreciate all the detail. Congrats again.

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Thanks, Nate.

Operator

Jim Rollyson, Raymond James. Please go ahead.

Jim Rollyson - *Raymond James - Analyst*

Hey, good morning, gentlemen.

Clint, you talked about lead time stretching out. Again, it's pretty remarkable to see how quickly that has spread to numbers we've never seen before. And it seems to be you guys are pretty well ahead of the game by placing orders for engines out multiple years. I'm curious how you're seeing your customers and maybe even competitors.

In terms of how they are set for planning out this far in advance, because it wasn't long ago that customers were kind of caught by surprise. When, a couple of years ago, lead times were beyond a year and now we're, almost three years. And so I'm just kind of curious how you think the customer base and the industry is set for planning on these extended time horizons?

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Yeah, it was a little bit of a surprise at one point of the lead times, we were running around 55 to 70 weeks, just depending on the day. And then overnight Cat went to 100 weeks or 108 weeks. And that's when we got in gear pretty quickly to try and figure out, how we were going to cover that. So we got creative for 27 and we're able to pull some stuff in. And then 28, we decided to go ahead and make that engine order for 28.

The customers, I think they're dealing with it just like we are.

Thankfully, we're able to provide for our customers with our plans for the future.

And competition, I haven't really heard what they're doing on any front.

I'm sure they're trying to figure it out just like we are. I think our capital program has gone from a one-year program to probably a three-year outlook and taking pieces of it at a time as we have to order engines. Now.

A lot of it is driven by the generation. It's the generator orders, because you see that aerial and cooler manufacturers, those lead times are still at 25 to 30 weeks. They're not stretched way out. So I think everybody's taking it in stride, and we're trying to make sure our customers are taken care of.

Jim Rollyson - *Raymond James - Analyst*

Yeah, well, kudos for being ahead of the game. And then I guess there's a follow-up.

Maybe you guys, Chris, you talked about OpEx or mainly higher oil prices that will drive lube oil and fuel costs up to some extent in the second half if oil prices stay up here. Curious how you think about your ability to pass that on, given how tight the market is and maybe the lag effect of being able to price that on. Obviously, you didn't change your guidance, so it's not impacting your margins at this point, but just kind of curious how you're all thinking about that.

Christopher Wauson - *USA Compression Partners LLC - Chief Operating Officer*

Yeah, no, thanks for that, it's Chris Wauson, one thing with inflation, with oil prices, everything, all of our costs are going up, so we're continuing to drive efficiencies in the organization to protect that margin, and as contracts expire and renewals come up, we do plan to address that accordingly. So, it's kind of two-fold. So we're going to manage it as best we can and continue to drive for efficiency. That's the biggest win here.

Jim Rollyson - *Raymond James - Analyst*

Appreciate the color, guys. Thanks.

Christopher Wauson - *USA Compression Partners LLC - Chief Operating Officer*

Thank you.

Operator

Eli Jossen, JP Morgan.

Eli Jossen - *JP Morgan - Analyst*

Hey, good morning. Just wanted to start on the outlook for new unit procurement. It seems like you've got orders placed for the next several years. So how should we think about the cadence of unit additions over these next couple of years? I know some of your peers have given an outlook through the decade, but just curious how we should think about new units in the fleet. Thanks.

Christopher Wauson - *USA Compression Partners LLC - Chief Operating Officer*

One thing we're trying to do is stick to that 100,000-ish horsepower of growth year over year. So with maybe even up to 125, just depends on how things shake out. But that's the beauty of our manufacturing business. So we can control that a whole lot better now. It's a lot more optionality. It enables us to really make those decisions and do what's best for our customers and the organization.

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Yeah. Hey, it's Clint. I want to add on that. I talked about a three-year capital program, and we're really only talking about the cost of the engine for that three years. We have the engines ordered, but we will wait until -- and we'll monitor lead times on compressors and coolers. And that way we can order those, with 40 weeks or something like that to have them in time for the engines to arrive. So I want to make sure we're not committed -- everybody understands we're not committed to the full compressor. Cost going out three years. It's just a deposit on the engine so far.

Eli Jossen - *JP Morgan - Analyst*

Got it. That's a helpful clarification. And then maybe shifting over to some of the stronger pricing we saw this quarter, as well as the utilization noise from the JW integration, can we help frame run rate levels on both of those metrics going forward? Should we expect continued pricing growth? And how will fleet utilization, you think, ultimately shake out once you're fully integrated?

Christopher Paulsen - *USA Compression Partners LLC - Vice President, Chief Financial Officer and Treasurer*

Hey, Eli, Chris Paulsen. So as it relates to the first part of that question on the utilization front, the utilization is reflective of the fact that we brought in over 1 million horsepower and essentially got that optionality, I think, on the Cheap. As we mentioned in our acquisition call, we noted that we felt like there were 900,000-plus readily deployable. We've taken the initial pass-through. That fleet, and that's why you see the over 1 million horsepower that's within our total count. We'll continue to review that and look more deeply into that total capacity. And part of that will be, as we continue to increase orders, increase our small horsepower utilization, as we noted, we increased it over 10% year-over-year, we see that potential to improve from here.

And those are some of those units that we'll evaluate. So presently, the horsepower utilization that you see, I think, is a baseline for a new run rate.

And I think it can only improve from here, both in terms of small horsepower utilization, but also as we dig deeper into some of that capacity. We may ultimately decide that that capacity is no longer deployable within our operations, but can be used on other operations elsewhere. As it relates to the revenue side of the question, the revenue, it's continued to improve, as we noted, 5% and 8% in terms of revenue relative improvement. We see that continuing to improve consistent kind of with the way in which we've approached in the past. I think as we see cost increase, many of our contracts and I should say most are CPIU-based, we've seen CPIU tick up almost 100 bps.

From not very long ago. So one, we'll have the CPIU support as it relates to revenue, but two, we are partnering with our upstream and midstream companies. We always do just that. And so they understand through any cycle that there's a give and take, and we recognize that too, and it's partnered as it relates to the business and would anticipate that as our cost increase, that there will be some relative cost increase on the other side of that and just need to have constructive conversations. And that's a big part of having great relationships within the business and being around since '98 and having, nearly two decades of relationships with our TOP10 customers.

Eli Jossen - *JP Morgan - Analyst*

Got it. Super helpful. Leave it there. Thanks.

Operator

(Operator Instruction)

Doug Irwin, Citi. Please go ahead.

Doug Irwin - *Citi - Analyst*

Thank you. Thanks for the question. Maybe one on JW Power here. It sounds like the manufacturing business is already maybe changing the way you approach your growth backlog a little bit.

Just curious now that you've had a bit more time with these assets under your belt, if there may have been any other opportunities or surprises you've been able to uncover with regard to synergy opportunities that maybe you haven't fully appreciated beforehand.

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Yeah, this is Clint, Doug. Thanks for your question. Yeah, I mean, we fully expect to, or we hope to find some diamonds in the rough, that we weren't expecting.

Definitely, the manufacturing business, the capacity there is between 100,000 and 125,000 horsepower in that facility, which is kind of what we expect to grow or plan to grow and maybe a little north of that over the next few years. So we feel like that will give us a lot of flexibility. The operation side of it being in every basin now.

And having facilities that are that are across the road from each other in several spots, there may be some synergy opportunity there. We think there's more to come. We're just trying to dig through the dig through the all the all the the opportunities and figure out which ones really come to life. Got it.

That makes sense. And then maybe just a higher level one as a follow-up.

Doug Irwin - *Citi - Analyst*

Looking at Slide 4 here in your slide deck, you caught the need for over $10 million incremental horsepower by 2030, which is obviously a huge number. Just curious what you see as your role in meeting that demand here moving forward. Do you potentially see a need to lean even further into growth kind of relative to what you already messaged here over the next couple of years? And then if you can maybe talk about maybe what basins on that map you see yourself as having the biggest advantage in.

Christopher Wauson - *USA Compression Partners LLC - Chief Operating Officer*

Yeah, this is Chris. Great question. So as it relates to that, part of it is what is that right forecast? And so we are always -- we're actively reviewing kind of the overall forecast for natural gas, understanding the LNG markets, the data center markets. They're exceptionally fluid, as you well know. I think ultimately we feel really good about kind of the forecast that was put forth on that particular slide. And the forecast as it relates to those basins. And I think it's all related to the relative natural gas price as well. Ultimately, I think the Rockies, for instance, is an area that we would say, at a higher gas price, that would probably most certainly be kind of a flattish range, whereas I think those rest of those areas are well-established in terms of their growth trajectories.

At current pricing, if not above. And so ultimately, as we think about our place in this trajectory, I mean, we want to be in a position to maintain our current standing and our current market share, if you will.

We know that in areas like the Northeast, we have an outsized market share, and it's an area that has returned to growth, and there's really fundamentally sound measures that support that 5% to 7% BCF. I think if we see coal gas switching, that number increases from here. And that's really based on announced projects. I mean, and there's still probably more to come there as it relates to the Gulf Coast and the Permian that are going to make up more than half of that.

We're well situated there. We're a big player in the Permian. We're a huge player in the Gulf Coast and Mid-Con, and we want to maintain our market share if not grow it in those respective areas as well.

Awesome. Thanks for your time. Thank you.

Operator

Selman Akyol, Stifel. Please go ahead.

Selman Akyol - *Stifel - Analyst*

Thank you. I just kind of wanted to follow-up on that last question. And, listening to the energy transfer call, they're certainly talking about the U.S. when everything settles out from the Middle East War. The U.S. becomes certainly a preferred supplier to the global outlook. And so as you think about that, should we expect to see an acceleration of your business?

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

We fully expect so. This is Clint, I'm sorry. If you look at the whole, the market, there's 15% to 20% of the LNG capacity locked in the Strait of Hormuz, locked in because of the Strait of Hormuz right now.

JKM prices are -- yesterday, they were at $16, and U.S. gas prices are at, $280 to $3. If you back up to March, January and March -- or January and February of this year, JKM was, $9 to $10, and U.S., Henry Huff pricing was $280 to $320. So we haven't -- even though JKM has gone up, we haven't seen the pricing increase here. The U.S. Part of that is takeaway capacity, right? I guess the major driver of it is, but by the end of the year, we're going to have a lot more capacity coming out of the Permian. There's.

There's several LNG facilities either expanding now under construction or, completely being built under construction. But if you look at the U.S. Department of Energy's website, they show five of those facilities will be online within the next 24 months. So with all that said, if Gas Takeaway is able to get out of the Permian and get to the facilities on the Gulf Coast or -- and.

Are able to get on boats and go across the ocean, the demand for U.S. natural gas is going to go up. we couldn't be more excited about the natural gas story right now, whether it's dry basin or the Permian or wherever. And any of that growth with us being in all the basins means that we have to grow with it. So we're super excited about the prospects of the future here.

Selman Akyol - *Stifel - Analyst*

All right.

Appreciate that. And then let me just ask you about the extended lead times. And I guess when you look at the 3600s you're talking, I believe 2,500 horsepower and up, is that all just being driven by, I guess, sort of AI backup power or primary power, and so you're competing against that? Is that what's really taking lead time's up, or is it something else?

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Well, it's both. It's natural gas driven engines that are generators that are driving, that market has increased extremely, right? So a lot of people ordering generation, and then you have folks ordering natural gas compression engines to supply the gas to the generators.

And CAT really doesn't have a lot of big plans to expand the manufacturing facility in the near future for the 3,600 series, which is the 2000, 2,500 up to 5,000 horsepower. So those are the drivers behind it. I mean, I think we're to the point now where we're starting to look at other engine manufacturers as options, whether it's domestic or international, because I believe there's a hole that we've got to start filling in the future. This is going to continue out.

Operator

Thank you. And there are no further questions at this time. I would like to turn it back to Clint Green for closing remarks.

Clint Green - *USA Compression Partners LLC - President and Chief Executive Officer*

Yeah, thank you all for joining our call today. As always, we're deeply appreciative of our employees and the stakeholders that enable us to conduct our business every day. With that, we want you all to have a great day.

Thank you for joining, and see you next time.

Operator

Thank you, ladies and gentlemen. This concludes today's conference call. You may now disconnect.
