

ValuingTools

Teaser

Specialist Company in Quality of Consumer
Products

Technical expertise at the service of the home care universe

With an approach based on rigor, accumulated experience and high analytical demands, it develops specialized technical activity in a segment with increasing quality and compliance requirements.



Appreciation		KPIs		2024
Enterprise value	+ 170,000 €	Turnover		295,000 €
Net financial debt	-12,131 €	EBITDA		50,000 €
Equity value	= 157,869 €	Net income		30,000 €

- ❑ It operates in the area of technical validation of personal hygiene products, cosmetics and household cleaning solutions, ensuring an integrated set of laboratory services and specialized support. Its offer includes physicochemical and microbiological tests, stability studies, performance evaluation and technical support in regulatory matters, positioning itself as a relevant partner for operators who require reliability, competence and procedural rigor.

- ❑ **Technical rigor, regulatory security and focus on product appreciation.**



Income statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Revenue	310,417	325,938	342,235	359,347	377,314
<i>growth (%)</i>	<i>5.0%</i>	<i>5.0%</i>	<i>5.0%</i>	<i>5.0%</i>	<i>5.0%</i>
Cost of goods sold	-7,760	-8,148	-8,556	-8,984	-9,433
Gross profit	302,657	317,789	333,679	350,363	367,881
<i>Gross margin %</i>	<i>97.5%</i>	<i>97.5%</i>	<i>97.5%</i>	<i>97.5%</i>	<i>97.5%</i>
Operating grants	0	0	0	0	0
Payroll expenses	-125,576	-131,855	-138,448	-145,370	-152,639
Supplies and external services	-114,854	-120,597	-126,627	-132,958	-139,606
Other operating income	0	0	0	0	0
Other operating expenses	-8,692	-9,126	-9,583	-10,062	-10,565
EBITDA	53,535	56,211	59,022	61,973	65,072
<i>EBITDA margin %</i>	<i>17.2%</i>	<i>17.2%</i>	<i>17.2%</i>	<i>17.2%</i>	<i>17.2%</i>
Depreciation & amortization expenses	-6,403	-7,403	-8,403	-9,403	-10,403
EBIT	47,131	48,808	50,619	52,570	54,668
<i>EBIT margin %</i>	<i>15.2%</i>	<i>15.0%</i>	<i>14.8%</i>	<i>14.6%</i>	<i>14.5%</i>

Income statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Financial income	900	900	900	900	900
EBT	48,032	49,708	51,519	53,470	55,569
<i>EBT margin %</i>	<i>15.5%</i>	<i>15.3%</i>	<i>15.1%</i>	<i>14.9%</i>	<i>14.7%</i>
Tax expense	-10,087	-10,439	-10,819	-11,229	-11,669
Net Income	37,945	39,270	40,700	42,241	43,899
<i>Net income margin %</i>	<i>12.2%</i>	<i>12.0%</i>	<i>11.9%</i>	<i>11.8%</i>	<i>11.6%</i>

Balance sheet estimated (€)

	2026E	2027E	2028E	2029E	2030E
Cash and equivalents	43,731	71,093	103,175	131,458	163,182
Operating accounts receivable	65,485	75,903	84,387	98,451	113,711
Government receivables	133	140	147	154	162
Accruals and deferrals	0	0	0	0	0
Other receivables	2,596	2,726	2,862	3,005	3,155
Total current assets	111,945	149,862	190,571	233,068	280,210
Fixed operating assets	35,267	37,864	39,461	40,058	39,655
Long-term financial assets	1,289	1,289	1,289	1,289	1,289
Total non-current assets	36,556	39,153	40,750	41,346	40,943
Total assets	148,501	189,015	231,320	274,414	321,153
Accounts payable	24,187	23,985	24,074	23,333	24,500
Government payable	18,793	19,733	20,719	21,755	22,843
Accruals and deferrals	0	0	0	0	0
Other payable	10,111	10,616	11,147	11,704	12,290
Total current liabilities	53,091	54,334	55,940	56,793	59,632

Balance sheet estimated (€)

	2026E	2027E	2028E	2029E	2030E
Long-term debt	0	0	0	0	0
Other non-current liabilities	57,169	57,169	57,169	57,169	57,169
Total non-current liabilities	57,169	57,169	57,169	57,169	57,169
Total liabilities	110,260	111,504	113,109	113,962	116,801
Common stock	1,000	1,000	1,000	1,000	1,000
Retained earnings	-904	37,041	76,311	117,011	159,252
Other equity items	200	200	200	200	200
Net income	37,945	39,270	40,700	42,241	43,899
Total equity	38,241	77,511	118,211	160,452	204,352
Total liabilities + equity	148,501	189,015	231,320	274,414	321,153

Cash-flow statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Net income	37,945	39,270	40,700	42,241	43,899
(+) Depreciation & amortization expenses	6,403	7,403	8,403	9,403	10,403
Δ to net working capital	-8,487	-9,311	-7,021	-13,362	-12,578
Operational cash-flow	35,862	37,362	42,082	38,282	41,724
Δ other liabilities	0	0	0	0	0
Δ long-term financial investment	0	0	0	0	0
CAPEX	-10,000	-10,000	-10,000	-10,000	-10,000
Cash-flow after investment	25,862	27,362	32,082	28,282	31,724
Δ long-term debt	-93	0	0	0	0
Δ equity	0	0	0	0	0
Cash-flow after financing	25,768	27,362	32,082	28,282	31,724
Cash balance	43,731	71,093	103,175	131,458	163,182

