

ValuingTools

Teaser

Professional Apparel Company

Company specialized in integrated professional apparel solutions

B2B platform with consolidated experience, personalized development and comprehensive customer support.

Appreciation

Enterprise value	+ 525k €
Net financial debt	- 304k €
Cash and other balances	+ 187k €
Equity value	= 408k €
EBITDA Multiple	3.6x

KPIs

Turnover	827k €
EBITDA	145k €
Liquid result	89k €

2026E



- ❑ It develops and supplies custom professional apparel, combining functionality, durability and aesthetics with the identity and operational requirements of each organization.
- ❑ The offer is aimed at business clients from different sectors, with a special presence in the hotel industry, complemented by projects in the areas of health, corporate services, industry, tourism and catering.
- ❑ It fully accompanies each project, from the survey of needs, design and selection of materials to production, customization, quality control, delivery and subsequent replacements.

Identity and function in each uniform.



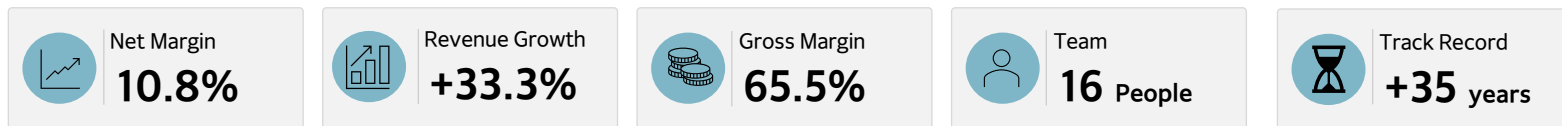


1. Investment thesis

- ✓ With almost four decades of activity, the company brings together technical knowledge, product development capacity and long-standing business relationships in different sectors.
- ✓ The activity has a relevant recurring component, with approximately 82% of revenues generated by existing customers between January and May 2026, supported by replacement needs, new hires and image renewal.
- ✓ After the reorganization carried out in 2025, the company entered a new phase of development, projecting a growth of 33.3% in turnover in 2026 and already registering around 5% of sales in international markets.



2. Other indicators 2026E



Note: The values presented were prepared based on the information provided by the company, and may reflect final or provisional data at the time of their sharing.



3. Opportunity

The company already has a consolidated brand, team, development capacity, production and commercial relationships, but maintains a still reduced presence in digital channels and international markets. An acquirer with greater commercial capacity and access to new markets will be able to accelerate these aspects, expand its presence in sectors with greater margin and take advantage of the existing structure to develop the business without having to build a specialized platform from scratch.

Income statement estimated (€)

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	2026E	2027E	2028E	2029E	2030E
Revenue	827,032	889,059	933,512	980,188	1,029,197
<i>growth (%)</i>	<i>33.3%</i>	<i>7.5%</i>	<i>5.0%</i>	<i>5.0%</i>	<i>5.0%</i>
Cost of goods sold	-285,326	-306,725	-322,062	-338,165	-355,073
Gross profit	541,706	582,334	611,451	642,023	674,124
<i>Gross margin %</i>	<i>65.5%</i>	<i>65.5%</i>	<i>65.5%</i>	<i>65.5%</i>	<i>65.5%</i>
Payroll expenses	-256,804	-269,644	-283,126	-297,282	-312,146
Supplies and external services	-138,941	-149,362	-156,830	-164,672	-172,905
Other operating income	827	889	934	980	1,029
Other operating expenses	-1,654	-1,778	-1,867	-1,960	-2,058
EBITDA	145,134	162,439	170,561	179,089	188,044
<i>EBITDA margin %</i>	<i>17.5%</i>	<i>18.3%</i>	<i>18.3%</i>	<i>18.3%</i>	<i>18.3%</i>
Depreciation & amortization expenses	-37,593	-41,443	-45,293	-27,601	-17,325
EBIT	107,541	120,996	125,268	151,488	170,719
<i>EBIT margin %</i>	<i>13.0%</i>	<i>13.6%</i>	<i>13.4%</i>	<i>15.5%</i>	<i>16.6%</i>
Financial expense	-18,092	-12,024	-6,674	-952	0

Income statement estimated (€)

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	2026E	2027E	2028E	2029E	2030E
EBT	89,448	108,973	118,594	150,536	170,719
<i>EBT margin %</i>	<i>10.8%</i>	<i>12.3%</i>	<i>12.7%</i>	<i>15.4%</i>	<i>16.6%</i>
Tax expense	0	0	0	0	0
Net Income	89,448	108,972	118,594	150,536	170,719
<i>Net income margin %</i>	<i>10.8%</i>	<i>12.3%</i>	<i>12.7%</i>	<i>15.4%</i>	<i>16.6%</i>

Cash-flow statement estimated (€)

	2026E	2027E	2028E	2029E	2030E
Net income	89,448	108,972	118,594	150,536	170,719
(+) Depreciation & amortization expenses	37,593	41,443	45,293	27,601	17,325
Δ to net working capital	20,330	-15,949	-22,738	-11,288	2,133
Operational cash-flow	147,372	134,466	141,150	166,849	190,177
Δ other liabilities	0	0	0	0	0
Δ long-term financial investment	0	0	0	0	0
CAPEX	-38,500	-38,500	-38,500	-38,500	-38,500
Cash-flow after investment	108,872	95,966	102,650	128,349	151,677
Δ short-term debt	-108,872	-95,966	-102,650	-17,076	0
Δ equity	0	0	0	0	0
Cash-flow after financing	0	0	0	111,274	151,677
Cash balance	9,335	9,335	9,335	120,609	272,286

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