

Earnings Call

3Q25

23/10/25



## Forward Looking Statements

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# Speakers



Carlos Rojas Aboumrad  
CEO



Andrés Pliego Rivero-Borrell  
CFO



# 01

## 3Q25 Performance Overview



**We remained focused on the variables within our control, demonstrating our ability to protect profitability**

Market volatility, cost pressure and adverse weather conditions

Need to Protect Liquidity

Complex Argentina Environment

**Headwinds**

Disciplined Cost Control leading to Significant EBITDA Growth & Margin Expansion

Strategic 'Defense Play' resulting in a Fortified Balance Sheet & increased cash

Focus on Self-Sufficiency achieving an Internally Funded Operation.

Despite the top-line contraction, our disciplined execution delivered positive results across all other key financial metrics proving our resilience in a complex environment

**Our Reponse**

# Business Priorities

## Sustainable growth of the core business



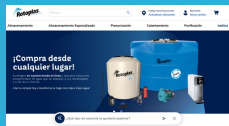
- **Mexico:** Operational agility resulted in stable margins. Continued to launch new solutions.
- **U.S.:** Delivered positive EBITDA for the second consecutive quarter, driven by gross margin expansion.
- **Argentina:** Achieved financial self-sufficiency; operation is sustained with its own internal resources.

## Growth and Development of New Businesses



- The **services** pillar continues its strong trajectory, with sales growth validating our recurring revenue strategy.
- Launched new technology platforms to enhance operational capabilities and prepare for future acceleration in **bebbia**.
- **Water treatment** businesses in **Mexico** and **Brazil** delivered a strong performance, building a solid commercial pipeline.

## Digital Transformation



- Advancing the consolidation of **B2B and B2C e-commerce** platforms to improve the customer experience.
- Launched new **conversational AI agents** to provide instant, automated support to clients and distributors.

## Sustainability and Stakeholder Commitment



- Achieved 71 points in the **S&P Global Corporate Sustainability Assessment**.
- Recognized by **CONAGUA** as the first "**Water-Responsible Company**" in Mexico.
- **HSBC** granted Grupo Rotoplas the **2025 ELIS Award**, completing its recognition across all ESG dimensions.
- Included for the first time in **Newsweek's "World's Most Trustworthy Companies 2025"**.



## **We are...**

- **Enhancing operational efficiency to capture market recovery and margin improvement.**
- **Validating our diversification strategy through strong growth in Services.**
- **Building a more resilient company, ready to create long-term, sustainable value.**

# 02

## Financial & Strategy Highlights



# P&L | Financial Highlights

Figures in million MXN

	3Q25	3Q24	Δ %/bps	9M25	9M24	Δ %/bps
Net Sales	2,671	2,838	(6%)	8,251	8,477	(3%)
COGS	1,555	1,658	(6%)	4,802	4,556	5%
Gross Profit	1,116	1,179	(5%)	3,449	3,921	(12%)
Margin	42%	42%	20 bp	42%	46%	(450) bp
SG&A	989	1,091	(9%)	2,976	3,105	(4%)
Operating Income	127	89	44%	473	817	(42%)
Margin	5%	3%	170 bp	6%	10%	(390) bp
Net Financing Cost	354	189	87%	625	439	42%
Taxes	(29)	(27)	(6%)	(20)	86	NA
Net Result	(198)	(73)	NA	(133)	291	NA
Margin	(7%)	(3%)	NA	(2%)	3%	(500) bp
EBITDA	285	247	15%	954	1,253	(24%)
Margin	11%	9%	200 bp	12%	15%	(320) bp

## 3Q25 Performance ex. Argentina

- Sales Growth: +3%
- EBITDA Growth: +40%
- EBITDA Margin: 15%

## 3Q25 Highlights

- Cost of Sales & SG&A decreased
- +15% increase in EBITDA



\*In 2025, EBITDA for the quarter includes \$0.1 million in donations, and \$2.2 million on a cumulative basis. By comparison, in 2024, \$4.0 million were considered in the quarter and \$5.0 million on a cumulative basis for the same period.

# Sales | Per Country



	3Q25	9M25
Δ Sales	2%	(5%)
EBITDA Margin	15%	18%

- Heavy rains impacted product sales, offset by growth in services.
- EBITDA impacted by lower product volumes, partially offset by strict expense control.
- Cumulative sales reflect high comparison base from 2024 drought.



	3Q25	9M25
Δ Sales	(32%)	(13%)
EBITDA Margin	(8%)	(7%)

- Sales decline reflects low market demand and heightened competition.
- Negative EBITDA driven by loss of scale, impacting cost and SG&A efficiency.
- Achieved financial self-sufficiency, sustained by internal resources.



	3Q25	9M25
Δ Sales	(8%)	11%
EBITDA Margin	5%	2%

- Sales impacted by customer/vendor delays; orders and backlog remains strong.
- EBITDA positive for second consecutive quarter.
- Margin expansion from supply chain efficiencies and streamlined operations.



	3Q25	9M25
Δ Sales	22%	19%
EBITDA Margin	20%	17%

- Peru: Growth driven by water flow categories and commercial initiatives.
- Central America: Growth supported by higher sales volumes and regional expansion strategy.
- Brazil: Continued sales expansion in water treatment plants.

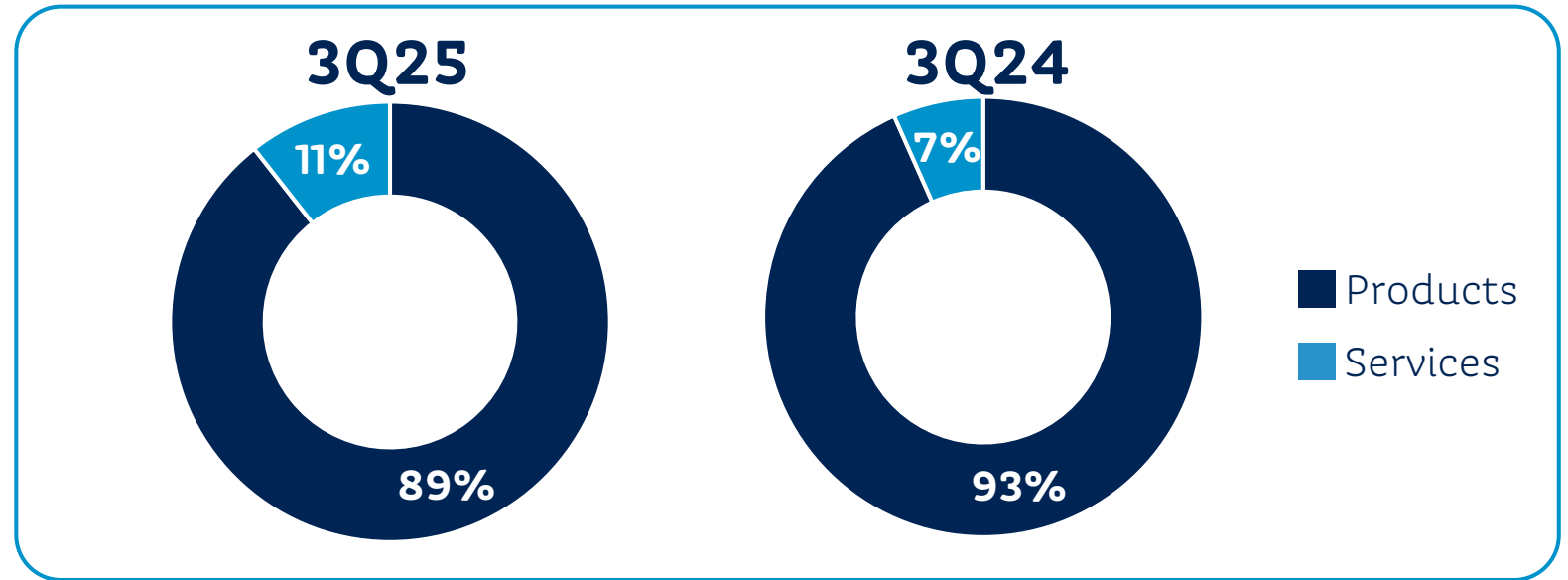


# Sales | Products & Services

Figures in million MXN

**+159,000 *bebbia*** subscribers

**Services** continue with **strong traction**



		3Q25	3Q24	%Δ	9M25	9M24	%Δ
<b>Products</b>	Sales	2,388	2,649	(10%)	7,429	7,823	(5%)
	EBITDA	348	352	(1%)	1,071	1,488	(28%)
	Margin %	15%	13%	130 bp	14%	19%	(460) bps
<b>Services</b>	Sales	283	189	50%	822	654	26%
	EBITDA	(63)	(105)	(40%)	(117)	(235)	(50%)
	Margin %	(22%)	(56%)	NM	(14%)	(36%)	NM
<b>Total</b>	Sales	2,671	2,838	(6%)	8,251	8,477	(3%)
	EBITDA	285	247	15%	954	1,253	(24%)
	Margin %	11%	9%	200 bps	12%	15%	(320) bps

# Cash Position

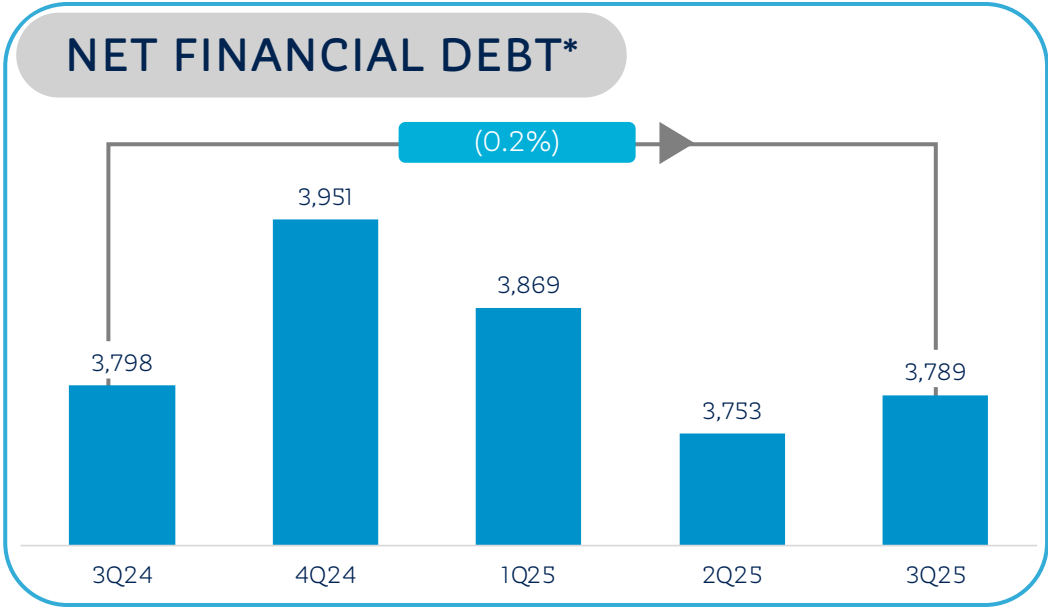
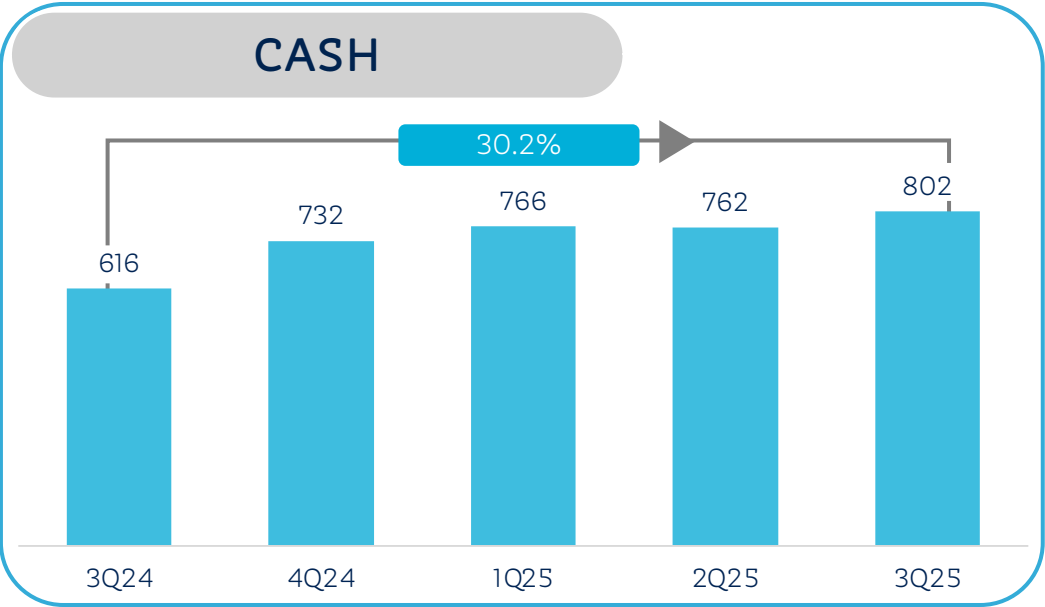
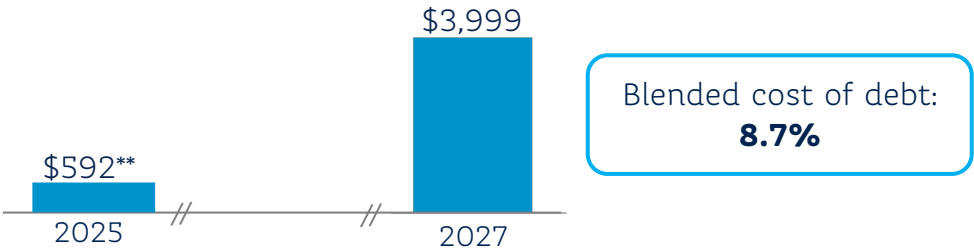
Figures in million MXN



## Current Leverage

Balance Sheet	2025	2024	Δ %
Cash & Cash equivalents	802	616	30.2%
Total Financial Debt	4,591	4,414	4.0%
Net Financial Debt*	3,789	3,798	(0.2%)
Net Financial Debt* / EBITDA	3.18x	2.10x	1.1x

## Debt Maturity Profile



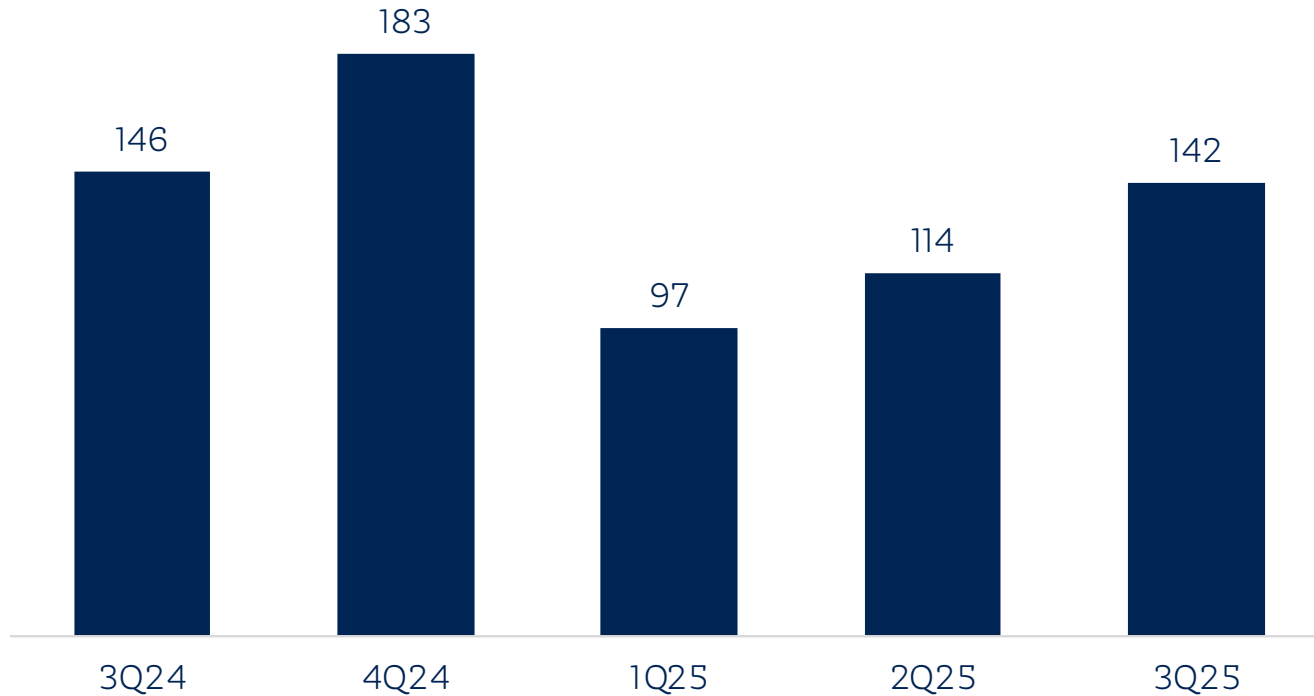
\*Net Financial Debt excludes leases  
\*\* Includes \$101 million in interest payable.



# Discipline in Capital Allocation

Figures in million MXN

## CAPEX

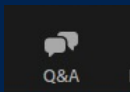


- **CapEx** was **4.3% of sales** for 9M25
- Focused on cash flow discipline and service growth
- Maintenance CAPEX remained low

- **We remain focused on controlling what is within our reach and navigating uncertainty with discipline.**
- **Continued progress toward a leaner, more efficient organization that enhances profitability and strengthens the balance sheet.**
- **Committed to staying true to our purpose while building long-term sustainable value.**



# Thank you!



You can submit a question by pressing the “Q&A” button.

Please include:

\*Name

\*Fund or Company

 **Rotoplas**<sup>®</sup>  
más y mejor agua