

Earnings Call

4Q25

13/02/26

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

# Forward Looking Statements

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# Speakers



Carlos Rojas Aboumrad  
CEO



Andrés Pliego Rivero-Borrell  
CFO



01

4Q25  
Performance  
Overview

We are committed to what has always defined us:  
**Creating solutions that solve real water challenges and make a meaningful difference in people's lives.**



### External Factors

- Weak demand and hyperinflation in Argentina
- Heavy rainfall and soft construction activity in Mexico



### Our Response

- Strengthening the operating model
- Allocating capital to projects with higher return
- Simplifying processes and reducing SG&A

**By focusing on what we can control in 2025 we achieved...**

**EBITDA**

**+1%**

Despite 1% decline in sales

**Services Sales**

**+41%**

Representing 11% of the portfolio

**Operating Expense as % of Sales**  
**35%**

From 37% in 2024

**Decrease in Leverage**  
**2.7x**

Net debt/EBITDA  
 From 3.0x in 2024

# Business Priorities

## Profitable Growth and Core Expansion

- **Mexico:** Focused on **targeted commercial execution and pricing discipline** while maintaining strict cost control to protect margins.
- **U.S.:** Strengthened **productivity and pricing** across branches.
- **Peru:** **Upgraded manufacturing** with blow molding **technology**, lowering unit costs and improving competitiveness.

## Tech and Talent Enablement

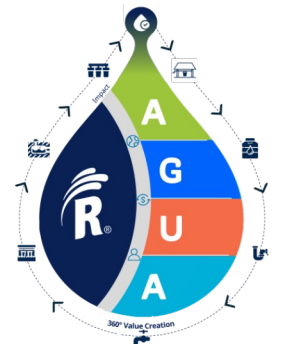
- Embedded **digital tools and AI** into daily workflows **across core functions**.
- **Automation** reduced friction and improved speed, accuracy, and decision-making.
- **Trained 1,500+** employees, delivering nearly 5,000 hours of **targeted upskilling**.

## Water Innovation and Market Disruption

- **Services** continued **scaling** through recurring models that increase revenue visibility.
- **bebbia expanded** its **subscriber base**, strengthening recurring demand and unit economics.
- **Water treatment and recycling plants secured long-term contracts**, building stable cash flows and customer relationships.

## Sustainability and Efficiency

- **Sustainability** embedded into operations, linking **efficiency improvements with lower environmental impact**.
- **Reduced Scope 1 and 2 carbon intensity 26%** year-over-year, 32% versus baseline.
- Launched the **evolution of our Sustainability Strategy: AGUA**





**Structural improvements & sharper execution**

**Service-oriented & disciplined growth**

**Strengthened foundation**

02

# Financial & Strategy Highlights

# P&L | Financial Highlights

Figures in million MXN

	4Q25	4Q24	Δ %/bps	2025	2024	Δ %/bps
Net Sales	2,829	2,723	4%	11,080	11,201	(1%)
COGS	1,746	1,823	(4%)	6,548	6,379	3%
<b>Gross Profit</b>	<b>1,083</b>	<b>900</b>	<b>20%</b>	<b>4,532</b>	<b>4,821</b>	<b>(6%)</b>
<i>Margin</i>	38%	33%	520 bp	41%	43%	(210) bp
SG&A	922	1,048	(12%)	3,898	4,153	(6%)
<b>Operating Income</b>	<b>161</b>	<b>(148)</b>	<b>NA</b>	<b>634</b>	<b>669</b>	<b>(5%)</b>
<i>Margin</i>	6%	(5%)	NA	6%	6%	(30) bp
Net Financing Cost	43	108	(60%)	667	547	22%
Taxes	27	(20)	NA	7	67	(90%)
<b>Net Result</b>	<b>91</b>	<b>(237)</b>	<b>NA</b>	<b>(42)</b>	<b>54</b>	<b>NA</b>
<i>Margin</i>	3%	(9%)	NA	(0%)	0%	(90) bp
<b>EBITDA</b>	<b>366</b>	<b>57</b>	<b>NA</b>	<b>1,320</b>	<b>1,310</b>	<b>1%</b>
<i>Margin</i>	13%	2%	NA	12%	12%	20 bp

## Efficiency Drivers

- Marketing optimization
- Budget control framework
- Strict control of travel expenses
- Optimization of digital and software-related expenses

## Sales | Per Country



	4Q25	2025
Δ Sales	16%	(0%)
EBITDA Margin	24%	20%

- Commercial strategy strengthened positioning and supported recovery.
- Services accelerated growth, expanding recurring revenues and increasing portfolio relevance.
- EBITDA expanded from efficiencies and strict expense control initiatives.



	4Q25	2025
Δ Sales	(29%)	(17%)
EBITDA Margin	(41%)	(14%)

- Construction market weakness pressured demand and reduced operating leverage absorption.
- EBITDA remained negative; working capital discipline preserved liquidity.



	4Q25	2025
Δ Sales	(0%)	8%
EBITDA Margin	6%	3%

- Industrial and chemical demand supported steady performance across diversified customer base.
- Pricing discipline and productivity enabled operational turnaround.
- EBITDA positive for third consecutive quarter.

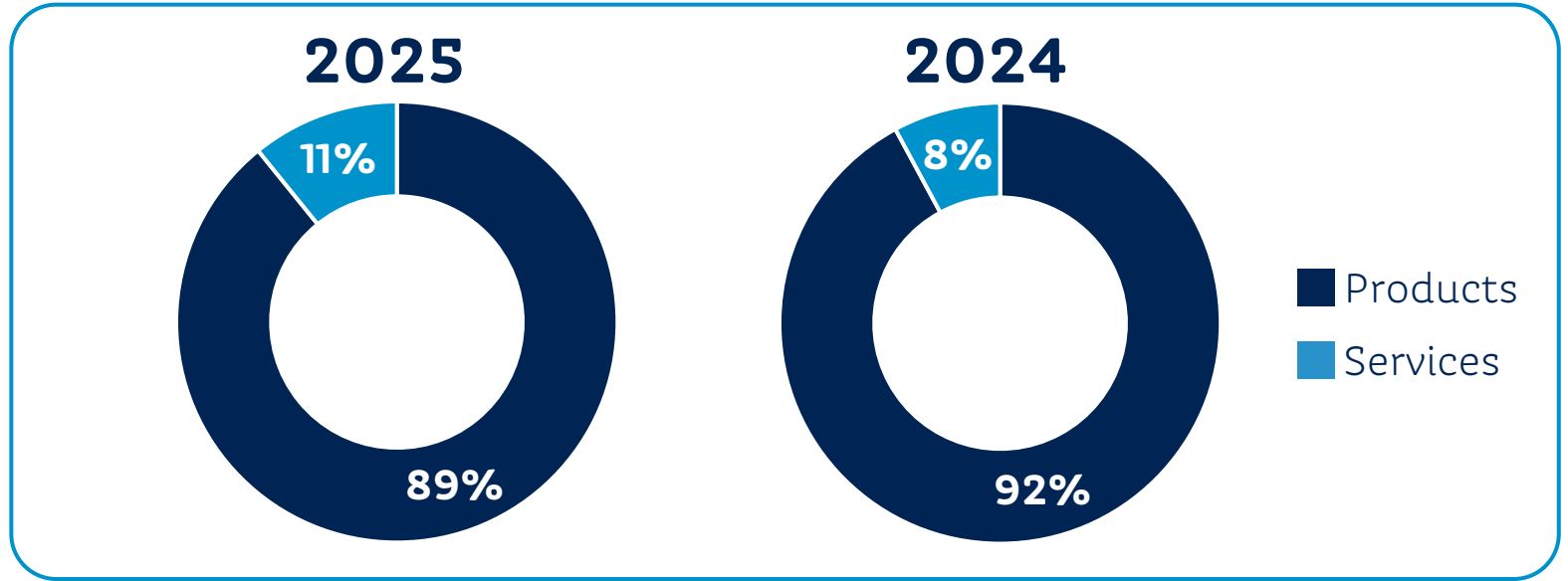


	4Q25	2025
Δ Sales	10%	17%
EBITDA Margin	24%	19%

- Peru:** Piping and heaters growth offset softer storage performance.
- Central America:** Regional expansion drove higher volumes across all product categories.
- Brazil:** Water treatment and recycling plants supported continued business development.

# Sales | Products & Services

Figures in million MXN



**+168,000 *bebbia* units**

**Products recovering** with improved execution across key markets.

**Services gaining scale** and improving profitability across the portfolio.

		4Q25	4Q24	%Δ	2025	2024	%Δ
<b>Products</b>	Sales	2,410	2,495	(3%)	9,840	10,318	(5%)
	EBITDA	344	158	NM	1,414	1,646	(14%)
	Margin %	14%	6%	790 bps	14%	16%	(160) bps
<b>Services</b>	Sales	419	229	83%	1,241	883	41%
	EBITDA	22	(101)	NM	(95)	(336)	(72%)
	Margin %	5%	(44%)	NM	(8%)	(38%)	NM
<b>Total</b>	Sales	2,829	2,723	4%	11,080	11,201	(1%)
	EBITDA	366	57	NM	1,320	1,310	1%
	Margin %	13%	2%	NM	12%	12%	20 bps

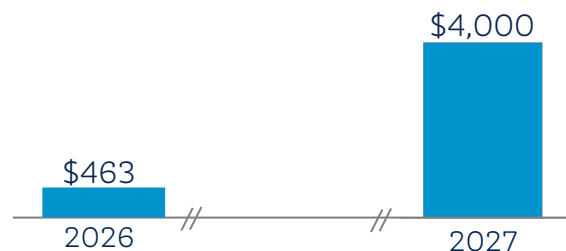
# Cash Position

Figures in million MXN

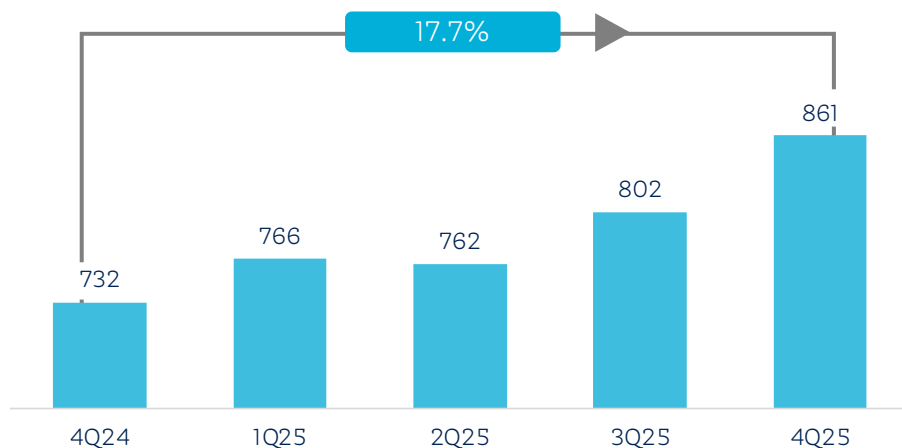
## Current Leverage

Balance Sheet	2025	2024	Δ %
Cash & Cash equivalents	861	732	17.7%
Total Financial Debt*	4,463	4,683	(4.7%)
Net Financial Debt*	3,601	3,951	(8.9%)
Net Financial Debt* / EBITDA	2.7x	3.0x	(0.3)x

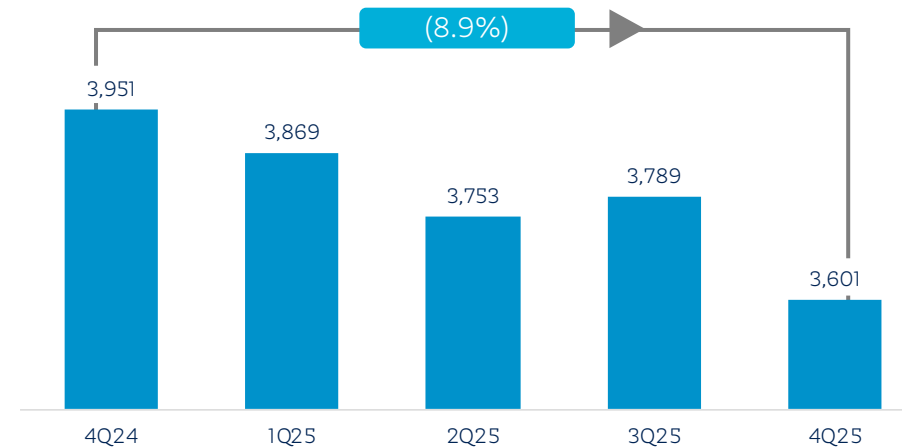
## Debt Maturity Profile



### CASH



### NET FINANCIAL DEBT\*

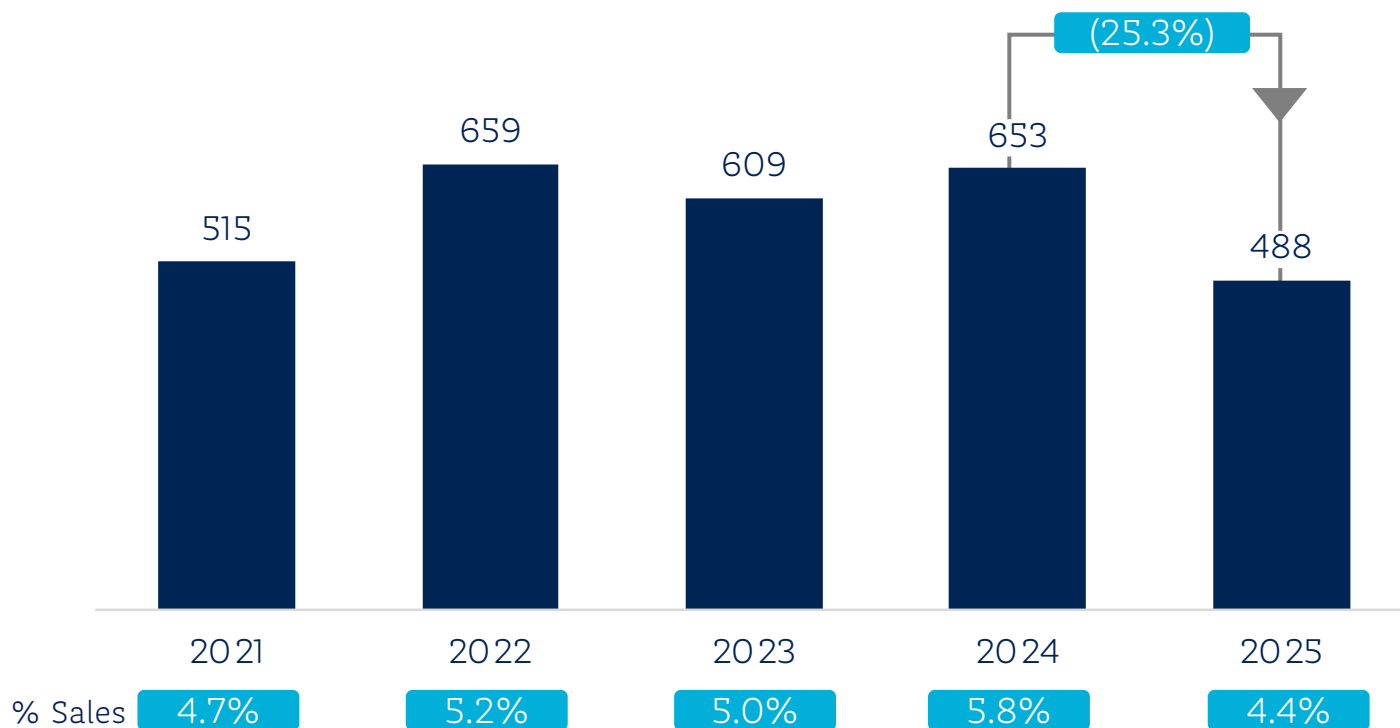


\*Net Financial Debt excludes leases

# Discipline in Capital Allocation

Figures in million MXN

## CAPEX



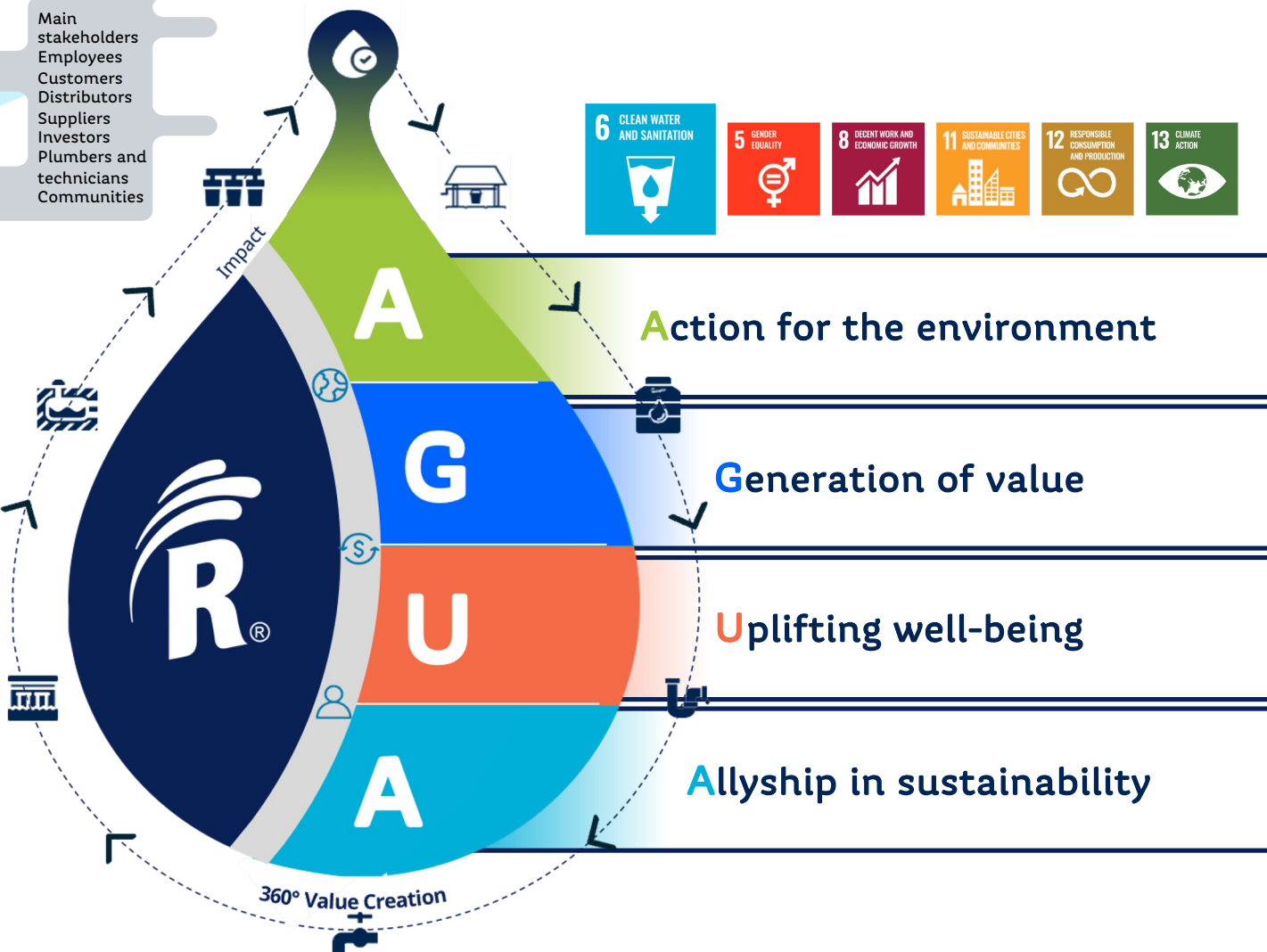
- **CapEx** was **4.4% of sales** for 2025.
- Focused on cash flow discipline and profitable service growth.
- +75% of total investment allocated to services.
- Maintenance CAPEX remained low.

# ESG Public Targets

	2024	2025	Target 2025
<b>Profit</b> Tier-1 critical suppliers evaluated with ESG criteria	76%	<b>98%</b>	100%
Customer satisfaction (NPS score)	80	<b>79</b>	80
<b>Planet</b> CO <sub>2</sub> intensity – Scopes 1 and 2 per ton of processed resin/metal	0.38	<b>0.28</b>	0.41
m <sup>3</sup> of water purified by our solutions	1.2M	<b>1.4M</b>	1.7M
<b>People</b> People with access to sanitation (cumulative since 2021)	1.1M	<b>1.2M</b>	1M
Women in the workforce	25.1%	<b>26.6%</b>	30%

# The evolution of Sustainability at Rotoplas 2025-2030

Main stakeholders  
Employees  
Customers  
Distributors  
Suppliers  
Investors  
Plumbers and technicians  
Communities



## Our latest Sustainability Achievements



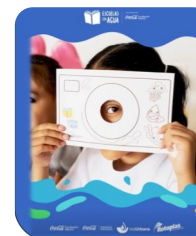
Entered the **“A” list in CDP** Climate Change, placing us among a very small group of companies in Mexico and globally.



Expanded **sustainability training** for distributors in Peru.

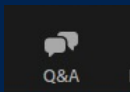


Strengthened community access to water in Mexico through the **Rotogotas de Ayuda** program.



**Escuelas con Agua:** +1,000 IoT rainwater harvesting systems benefitting +330K students. Partnership with Coca-Cola Foundation and others

# Thank you!



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

Please include:

\*Name

\*Fund or Company

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