

Roca Group

BRIC's International Logistics

Jan 2012



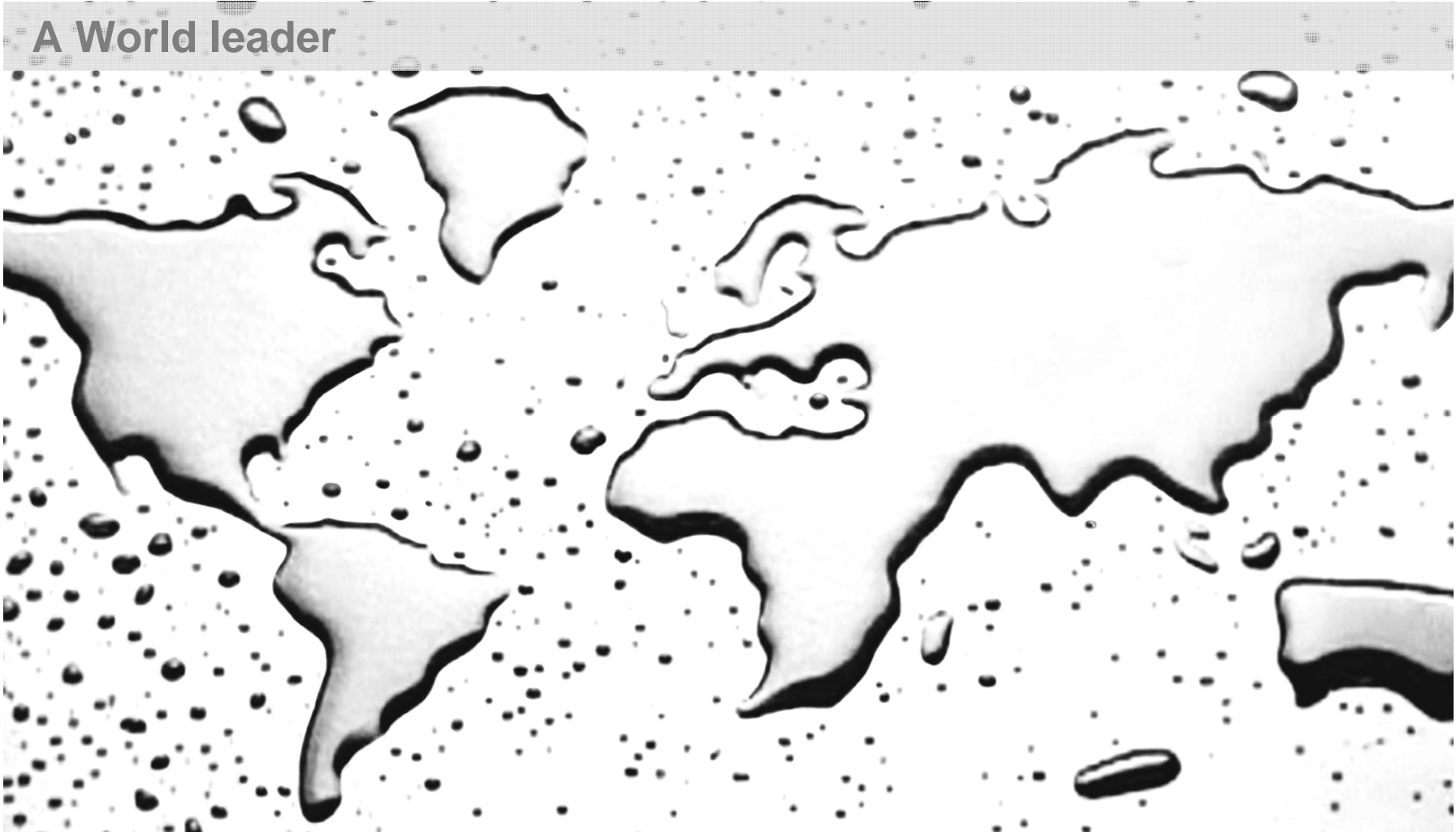
THE LEADING GLOBAL
BATHROOM BRAND
www.roca.com

Agenda

- a. The Group Today
- b. Business Areas
- d. Worldwide presence
- e. Brazil
- f. Russia
- g. India
- h. China

a. The Group today

A World leader



a. The Group today

World leader in the sanitaryware sector.

Active in 135 markets around the globe.

Leader in Europe, Latin America, India and Russia.

Strong presence in China, Middle East, Asia, Australia and Africa.

Currently focusing on the USA.

Turnover in 2011: €1,551 million.

Directly employs 21,000 people worldwide.



c. Business Areas

World leader in the sanitaryware sector



c. Business Areas

Vitreous china



Roca provides everything needed to fit out a complete bathroom.

c. Business Areas

Bathubs, Shower Trays, Spas ...



c. Business Areas

Faucets, cabins and columns, Shower screens



c. Business Areas

Furniture



c. Business Areas

Shower toilets



c. Business Areas

Ceramic tiles for indoor and outdoor use.



Roca has ceramic tile factories in Spain, Brazil and China



c. Business Areas

Kitchen. Sinks and faucets



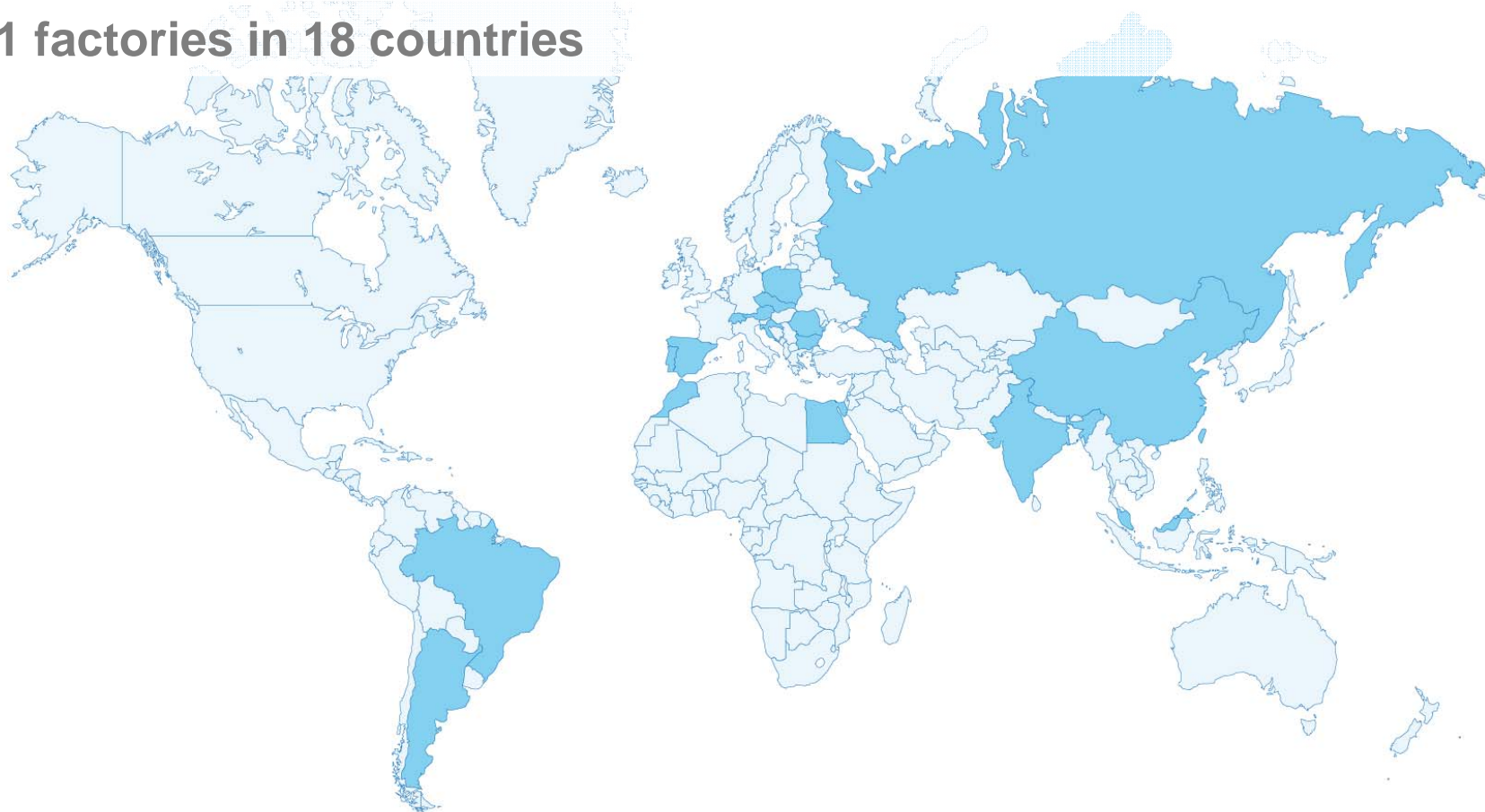
d. Worldwide

Our products are sold in more than 135 countries



d. Worldwide

71 factories in 18 countries



d. Worldwide

Our factories locations



Europa – África (44)



Asia (17)



Latin America (10)



d. Worldwide

Europe - Africa

RUSSIA	6
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Roca	
Tosno	1
Santeri	
Ugrakeram	1
Keramika	
Cheboksari	3
Akvaton	
Davidovo	1

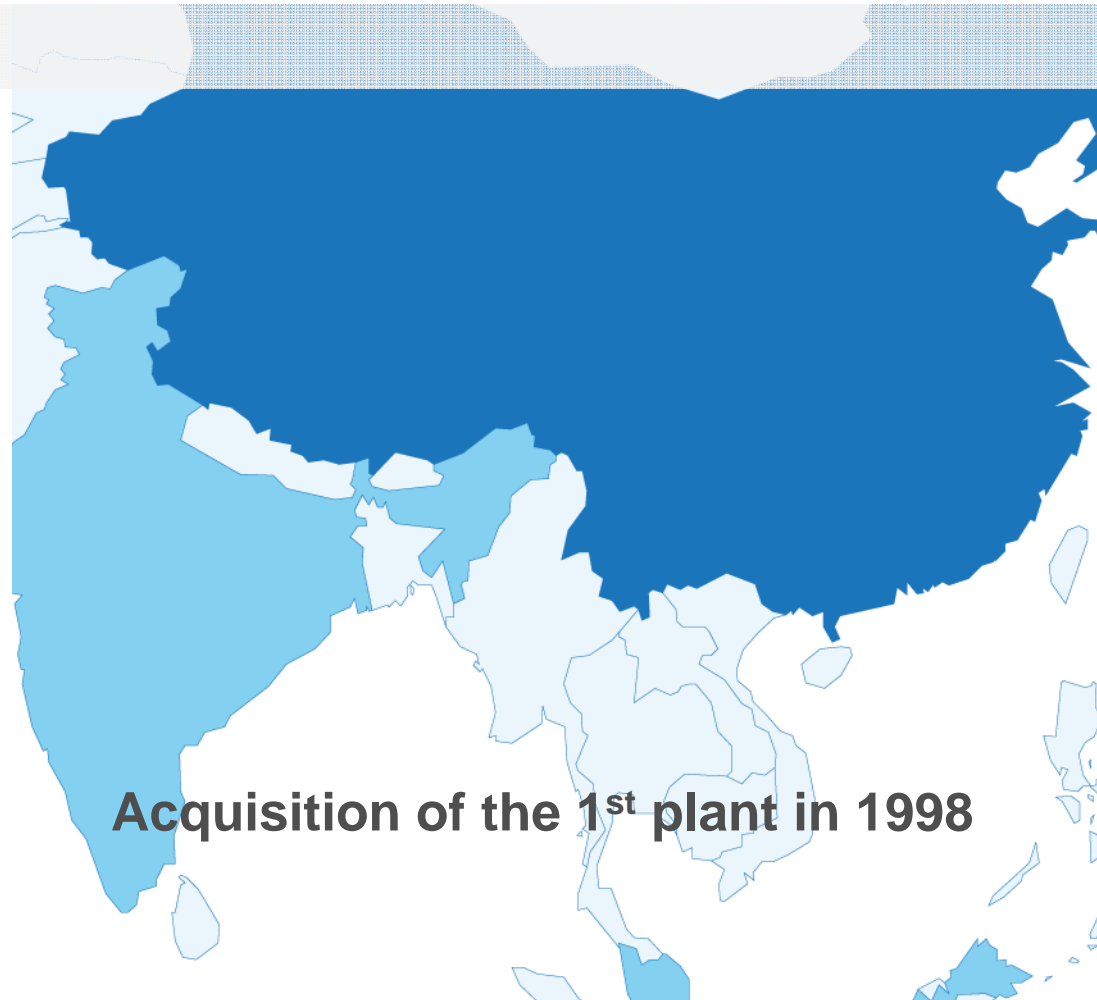
Greenfield plant in 2005

d. Worldwide

Asia

CHINA 10

Roca	
Foshan	2
Roca Suzhou	
Suzhou	3
Ying	
Foshan	1
Jiangmen	1
Tangshan	2
Cosmic	
Guangdong	1



Acquisition of the 1st plant in 1998

d. Worldwide

Asia

INDIA

5

Parryware Roca

Ranipet

1

Dewas

1

Alwar

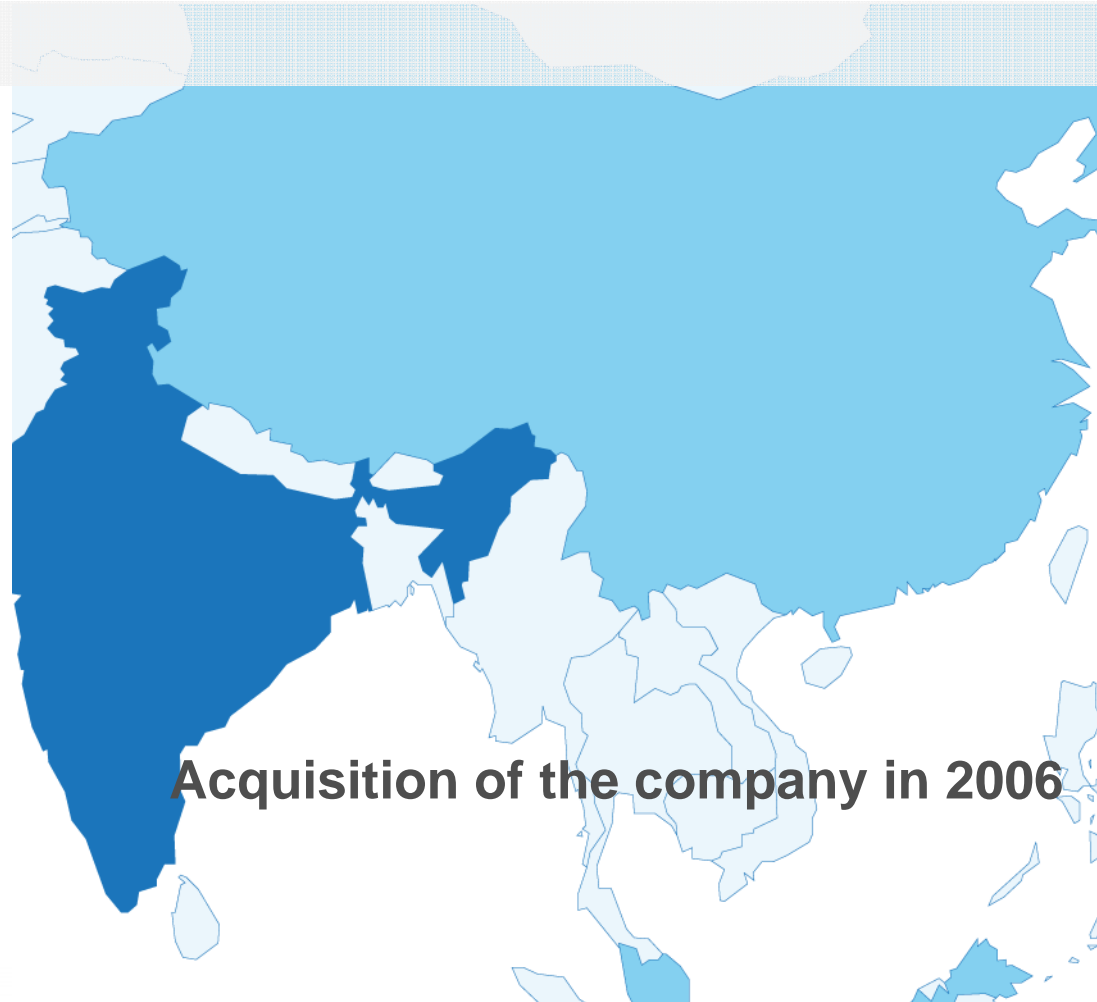
1

Perundurai

1

Bhiwadi

1



Acquisition of the company in 2006



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d. Worldwide

Latin America

BRAZIL 8

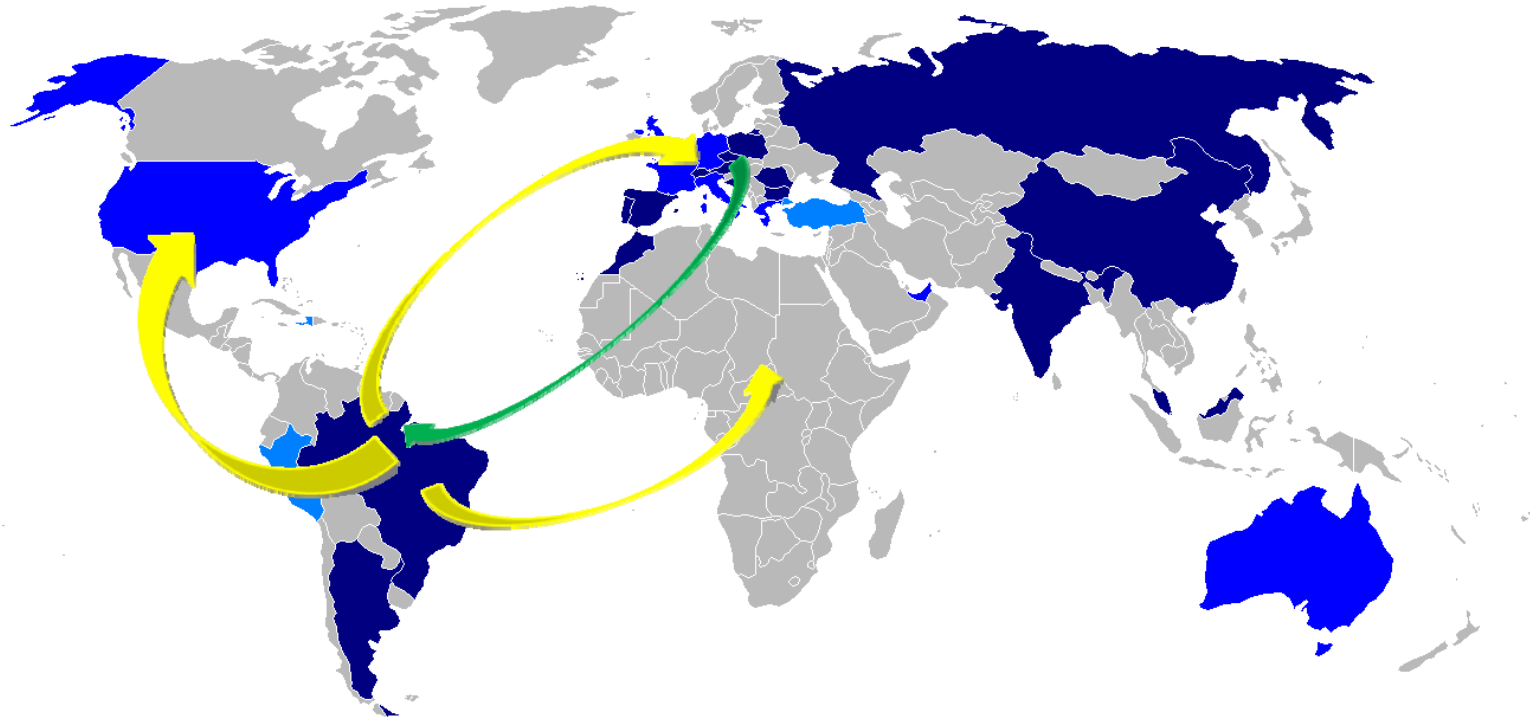
Roca	
Jundiai	2
Recife	1
Serra	1
Sta Luzia	1
Incepa	
San Mateo	1
Campo Largo	2



Acquisition of the company in 1999

e. EXPORT / IMPORT – BRAZIL

BRAZIL



e. EXPORT / IMPORT – BRAZIL

BRAZIL

comments & trends

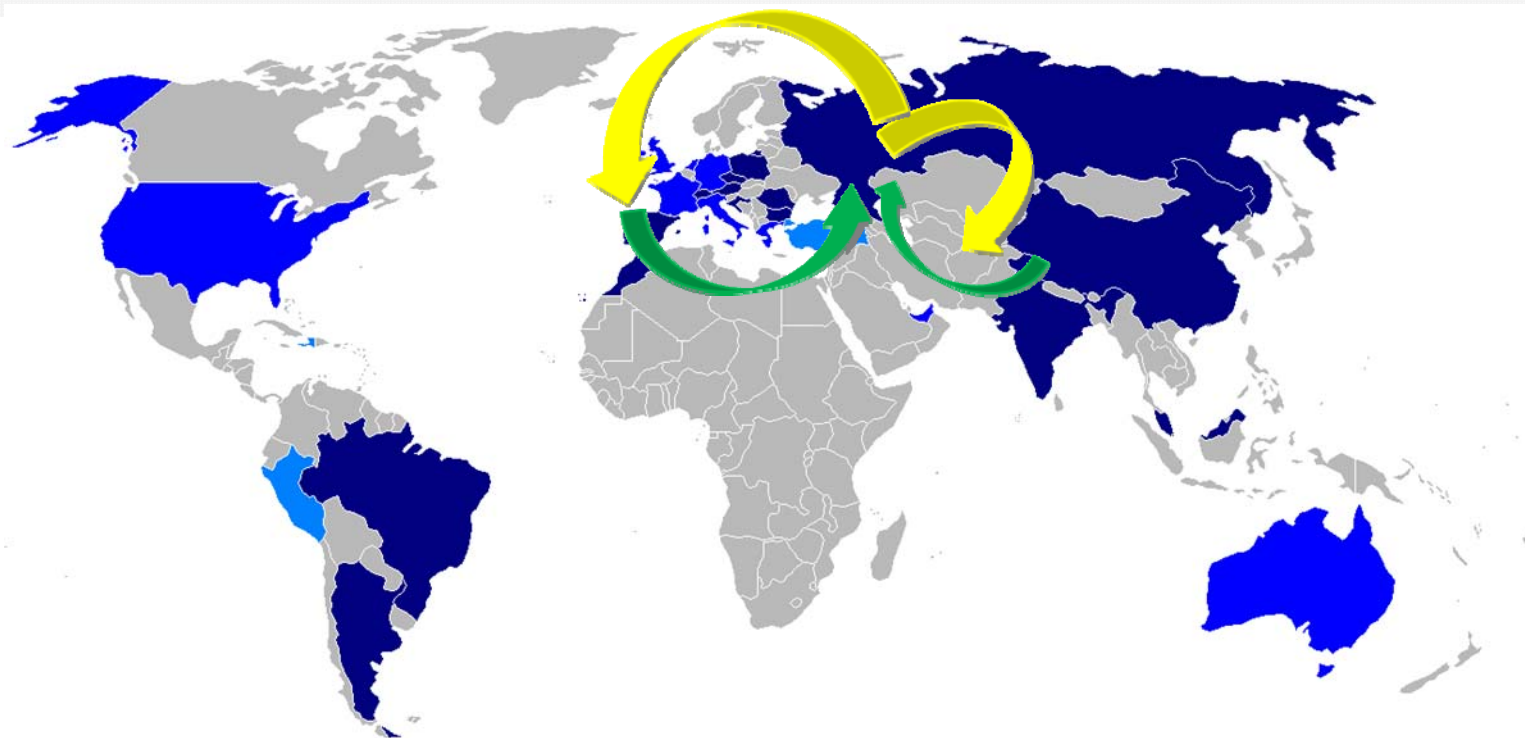
- ✓ **Strong import taxes.**
- ✓ **Particular norms acting as a technical barriers.**
- ✓ **Strong internal demands for services and goods.**
- ✓ **Brazil is one of the biggest raw materials exporter.**
- ✓ **Only export to Brazil, top products**
- ✓ **Rest, try to develop locally if possible**

TRANSPORT COSTS	FREIGHT	TRANSIT TIME	CUSTOM DUTIES
EUROPE - BRAZIL	1.275 €	15 Days	18,0%
BRAZIL - EUROPE	1.750 €	25 Days	7,0%



f. EXPORT / IMPORT – RUSSIA

RUSSIA



f. EXPORT / IMPORT – RUSSIA

RUSSIA

comments & trends

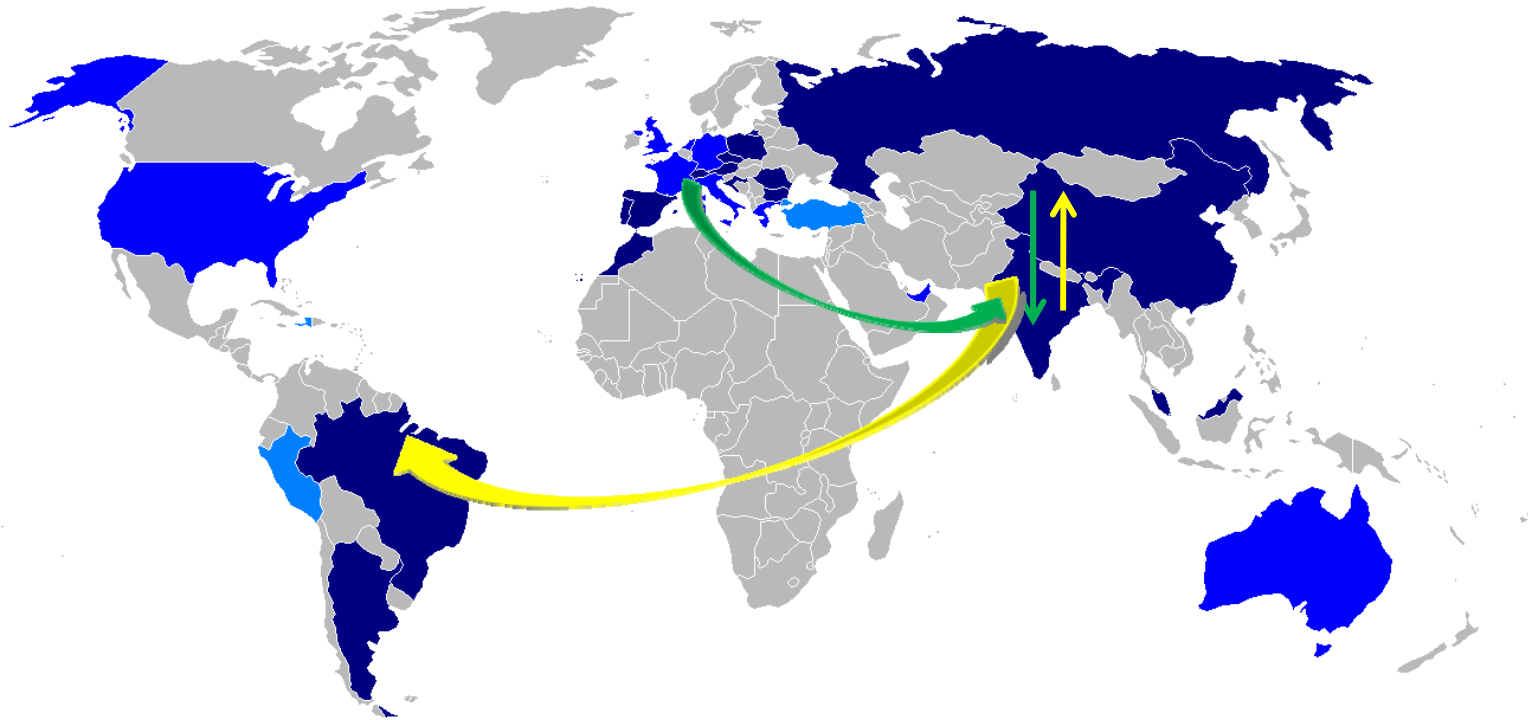
- ✓ **Strong import taxes.**
- ✓ **Particular norms acting as a technical barriers.**
- ✓ **Strong internal demands for services and goods.**
- ✓ **Russia is one of the biggest exporters of energy & RM.**
- ✓ **Try to develop locally if possible**

TRANSPORT COSTS	FREIGHT	TRANSIT TIME	CUSTOM DUTIES
EUROPE - RUSSIA	1.700 €	11 Days	15,0%
RUSSIA - EUROPE	850 €	8 Days	7,0%



g. EXPORT / IMPORT – INDIA

INDIA



g. EXPORT / IMPORT – INDIA

INDIA

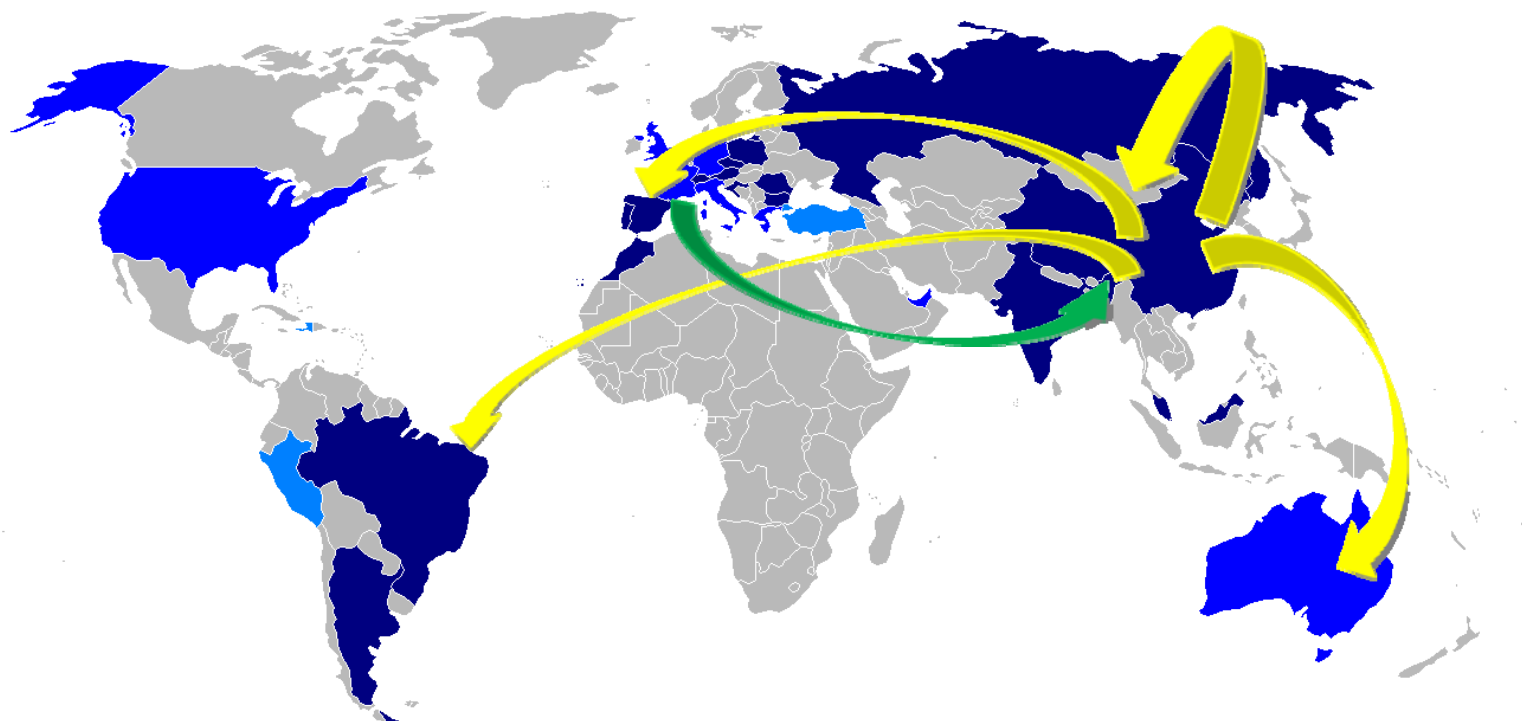
comments & trends

- ✓ **Strong import taxes.**
- ✓ **Particular norms acting as a technical barriers.**
- ✓ **Strong internal demands for services and goods.**
- ✓ **India is one of the biggest exporters of IT services.**
- ✓ **Try to develop locally if possible**

TRANSPORT COSTS	FREIGHT	TRANSIT TIME	CUSTOM DUTIES
EUROPE - INDIA	687 €	23 Days	10,0%
INDIA - EUROPE	1.450 €	29 Days	7,0%

h. EXPORT / IMPORT – CHINA

CHINA



h. EXPORT / IMPORT – CHINA

CHINA

comments & trends

- ✓ Import taxes decreasing, economy very regulated.
- ✓ Great domestic market with strong competition.
- ✓ Local producers moving from ..

No-BRAND → OEM → BRAND

- ✓ China is the factory of the world.
- ✓ Few import barriers, only import luxury products.

TRANSPORT COSTS	FREIGHT	TRANSIT TIME	CUSTOM DUTIES
EUROPE - CHINA	395 €	26 Days	10,0%
CHINA - EUROPE	2.500 €	26 Days	7,0%

Thank you



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