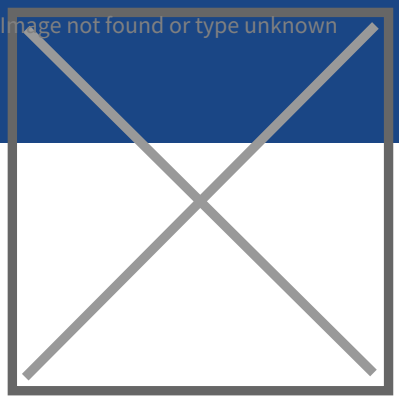
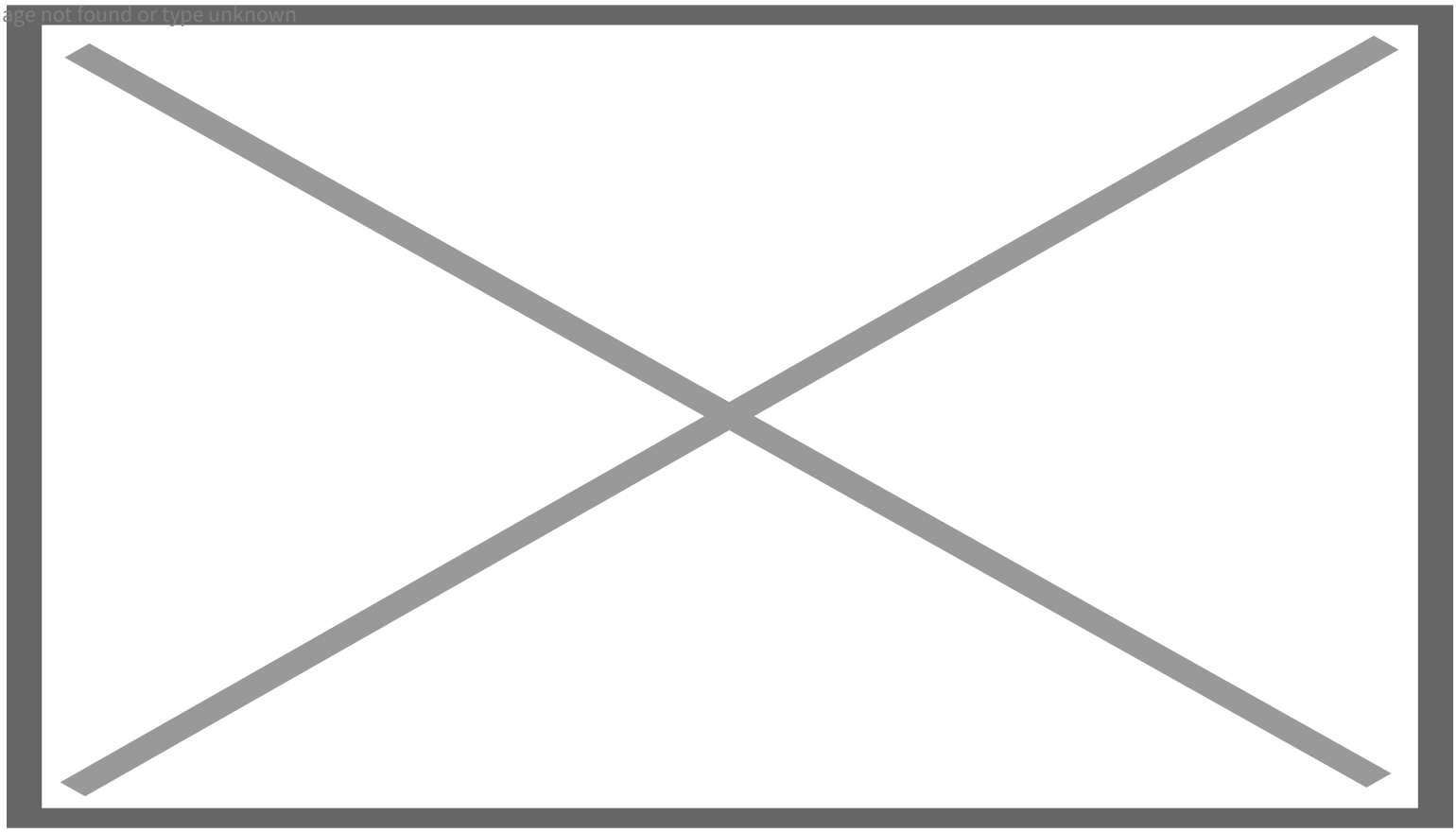
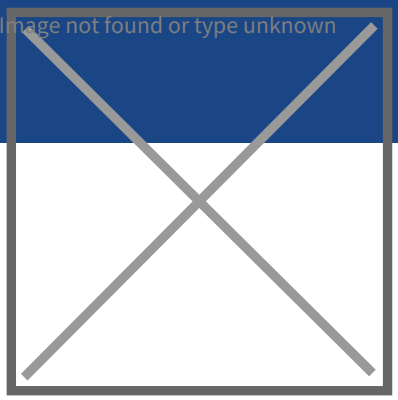


意大利奢侈品集团女鞋鞋



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MERGERSCORP



TARGET PRICE

$ 39,000,000

GROSS REVENUE

$ 40,000,000

EBITDA

$ 5,000,000

BUSINESS TYPE

制造业 - 纺织、服装与消费品

COUNTRY

意大利

BUSINESS ID

L#20251060

此次战略收购为收购位于意大利托斯卡纳中心地带的一个全面整合、高产能的
提供了一个难得的机会。
此次收购包括由五个实体组成的协同集群，旨在成为全球奢侈品牌的无缝高端生产引擎
。

此次收购是一个 “即插即用 “的解决方案，包括

- 3 以 “意大利制造
  “的卓越品质而闻名，专门为全球顶级奢侈品公司生产复杂结构的女式鞋面和成品鞋。
- 2
- 1 提供结构精密的专有技术组件。
  - 1 确保对鞋底的垂直控制。

该平台的定位是私募股权公司或大型奢侈品集团的理想
项目，它们希望通过垂直整合确保供应链安全并提高利润率。

- 该平台可立即过渡，即时提高生产能力和技术 “技能”。
- 位于世界一流的制鞋区，拥有专业的劳动力和深厚的本地原材料供应商网络。
- 通过同时控制鞋面制造和基本鞋底/鞋垫组件，买方消除了第三方瓶颈，并确保在整个生产周期内进行严格的质量控制。
- 将意大利传统工艺与现代工业效率相结合，符合现代奢侈品集团所要求的严格 ESG 和质量标准。

1

公司位于最重要的鞋区之一的中心地带，专门为一些最知名的国际时尚品牌生产奢侈女鞋。
该公司在制鞋业拥有二十多年的经验，在研究、款式和技术开发方面都处于领先地位。

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这种广泛的专业技能促成了许多著名的合作，不断证实了其产品的卓越品质。

业务由三个独立但地理位置相近的设施开展，总面积约为 3,650 平方米。
其中包括：一个总部、办公室和生产基地；一个仓储和物流基地；以及一个专门从事切割和上部组装的基地（tomaificio）。

设施

生产设施配备了最先进的机械设备，包括最近安装的垂直自动仓库，以确保效率、精度和高质量标准。

生产区的组织确保了生产过程中每个阶段的效率和精确度。
它包括一条设备齐全的生产线，配有先进的装配和持久（曲柄）系统，确保了生产的一致性、灵活性和高质量。
专门的精加工和手工处理部门对细节一丝不苟，使每件产品都能达到最高的奢华标准。

这些设施还配备了最近安装的现代化垂直自动仓库，可优化库存管理、提高工作流程效率并确保准确的材料处理。
切割和拼接（上部组装）作业由一个专门部门负责，该部门配备了先进的机器和熟练的工艺，以确保所有生产阶段的精度、质量和无缝集成。

交易机会

- 希望的交易：出售大部分股权，公司内部继续运营。
- 该物业希望成为更大发展项目的一部分，因此欢迎提供再投资机会
  由买方负责，并可陪同买方一起支持业务发展

所有权

- 财产由单一成员全资拥有

财务要点

2020 2021 2022 2023 2024 2025F

销售额 13,610 16,570 18,630 26,140 20,570 22,800

销售额同比 增长 + 16.9% + 21.7% + 12.4% + 40.3% – 21.3% + 10.8%

Ebitda 1,890 2,350 2,490 3,250 2,850 3,010

息税折旧摊销前利润率 + 13.9% + 14.2% + 13.4% + 12.4% + 13.9% + 13.2

2

公司位于意大利中部，专门生产奢侈鞋类的鞋垫和鞋底，为一些最知名的时尚品牌供货。
通过与顶尖时装设计师的长期合作，公司开发并制造出与最终产品完美结合的高品质组件。
其现代化的生产设施配备了先进的机器和内部实验室，再加上技术熟练的员工队伍的专

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业知识和工艺，自 2019 年以来取得了显著增长。 公司经营的物业占地约 900
平方米，共两层，毗邻的 1 100 平方米土地包括约 500 平方米的可建筑面积和 600
平方米的停车位。

2020 2021 2022 2023 2024 2025F

销售额 1,100 1,320 1,985 2,897 1,787 2,500

Ebitda 90 115 90 160 130 200

3

公司位于意大利中部，专门为全球知名高级时装品牌生产奢侈鞋垫。 公司自 1985
年开始运营以来，不断适应不断变化的市场需求，实现自我更新。
如今，通过将先进技术与丰富经验相结合，该公司能够以 “意大利制造
“的优质、精密和精致产品满足客户的需求。 目前的生产设施占地约 1,000
平方米，包括 600 平方米的生产空间和 400 平方米的停车场。 目前正在修建一座 700
平方米的新楼，使总面积达到约 1 700 平方米。
此外，公司最近还投资购买了新的凸轮设备，大大提高了高跟鞋部件的精度和质量。

2021 2022 2023 2024 2025F

销售 1,280 2,400 2,491 1,490 2,050

除税前利润 85 429 545 151 310

4

公司位于意大利中部，专门为国际奢侈品牌生产鞋面。 它几乎只与 LVMH
集团合作，同时也为集团旗下的其他公司生产鞋面。
公司深深扎根于当地，体现了家族第一代和第二代人的专业技能，他们在该行业建立了
良好的声誉，并被公认为是上层生产领域的佼佼者。
如今，集团在塞尔维亚拥有四家生产工厂，分别生产特定的鞋类产品，员工总数超过
850 人。

2021 2022 2023 2024 2025F

销售额 535 665 720 1 200 1 400

Ebitda 35 40 110 160 300

5

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公司生产优雅的女鞋，在意大利中部运营，为 Miu Miu 和 Prada 等著名品牌提供服务。
该公司通过完全集成的流程开发产品，提供端到端的服务，包括设计支持、原型设计、开发、生产以及最终包装和交付给最终客户。
家族还控制着一家意大利鞋面制造公司，其收入约为 110 万欧元，主要为 LVMH 集团旗下的公司和其他国际奢侈品牌供货。
公司目前正处于收购一家鞋类制造企业的后期阶段，该企业将成为公司生产能力的真正延伸，特别是在运动鞋等其他产品类别方面。
该公司在当地保持着强大的影响力，并与其客户保持着稳固、长期的合作关系，这得益于其始终如一的高质量产品。

	2021	2022	2023	2024	2025F
销售额	6,130	14,290	14,480	11,135	14,780
EBITDA Adj	101	1,170	1,210	475	1,125

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