



Unmatched Quality Tiles

# CORPORATE BRIEFING SESSION

## 2021

SATURDAY, NOVEMBER 13, 2021 AT 3 PM



SHABBIR TILES AND CERAMICS LIMITED



# About Stile



- Stile was founded by the "House of Habib" in 1978 which is one of the largest groups of Pakistan.
- House of Habib is a reputable group with market reputable names like;



- First private sector enterprise & Market Leader in the Ceramic and Porcelain Tiles industry of Pakistan.
- We were incorporated in Pakistan as a Public Limited company and listed on the Pakistan Stock Exchange Limited.
- We have Latest state of the art plants producing tiles for every market segment.
- ISO 9001:2015 certified from Lloyd Quality Assurance.



## Why Stile?

- We are committed to provide the Best Quality products to our customers.
- Stile is the only Brand in Pakistan certified on ISO standards by Centro Ceramico, Italy.
- Stile is also the only brand making Real Porcelain Tiles in Pakistan of water absorption less than 0.5%
- We have acquired Latest European technology to produce best quality tiles.
- Stile is the first brand in Pakistan which introduced digital printing in the year 2013.
- Research & development is the backbone of Stile where we invest heavily.
- Development of Human resource is our success.
- Our strength is our Huge dealership network which has spread over to 300 plus dealers from Karachi to Gilgit.
- We are the only vertically integrated tiles manufacturer. Having retail presence with 15 company operated retail outlets currently operating in Karachi, Hyderabad, Lahore, Faisalabad, Multan, Peshawar, Rawalpindi and counting.



# TESTED & CERTIFIED QUALITY STANDARDS BY CENTRO CERAMICO



## **Centro Ceramica – Bologna, Italy**

Centro Ceramico is a Research and Experimentation Center for the Ceramics Industry, founded in 1976 and managed by a University Consortium which includes:

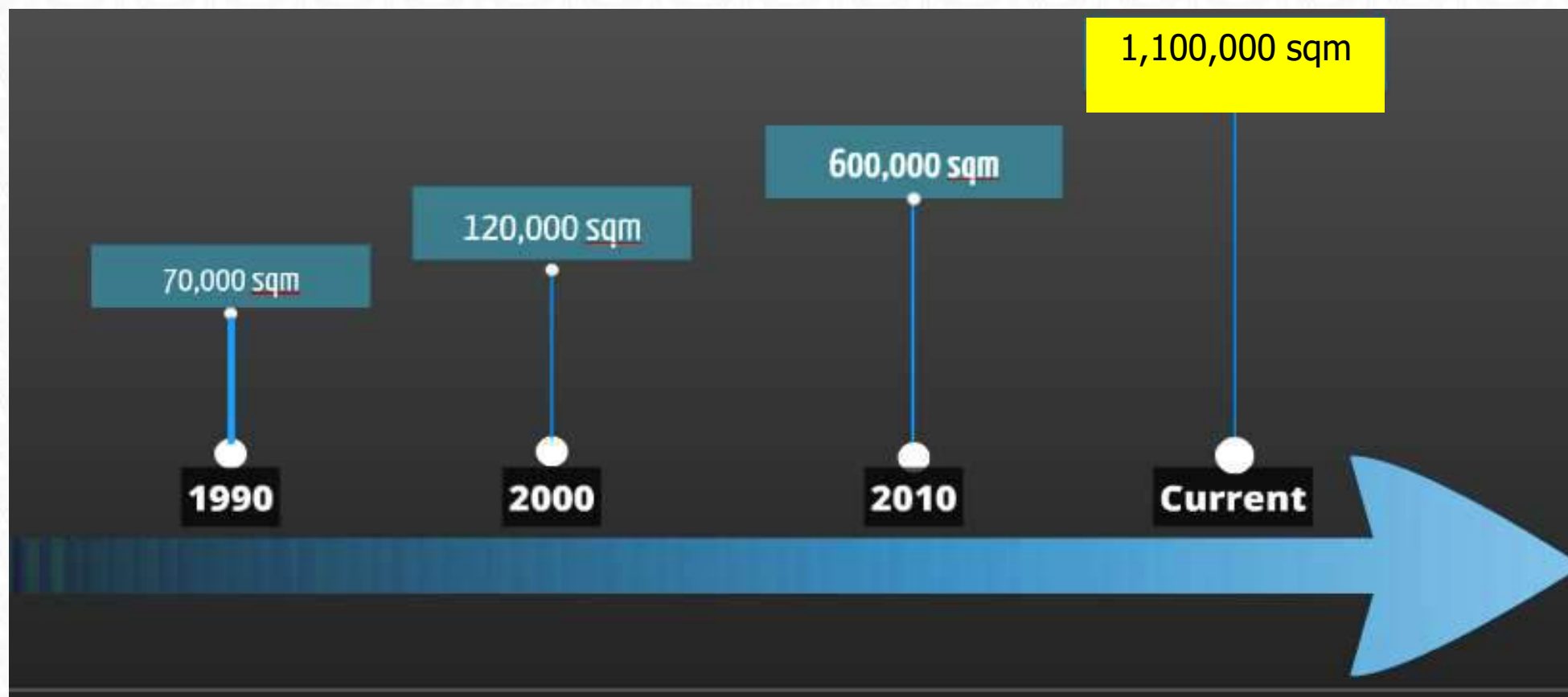
- Alma Mater Studiorum University of Bologna
- Confindustria Ceramica
- ANCPL Emilia Romagna.

## **Specialties**

- Research and technology transfer,
- Testing and analysis of ceramic materials,
- Services and technical assistance for the ceramics industry,
- Support and development of technical regulations,
- Advanced training, and Design skills - European / National / Regional Band



## Average Production (Monthly)<sub>approx.</sub>





# Product Portfolio

## CERAMIC TILES

## PRODUCTS RANGE



BATHROOM TILES



KITCHEN TILES

## PORCELAIN TILES



NANO POLISH



GLAZED POLISH



GLAZED MATT

## VITRIFIED TILES



OUTDOOR TILES



WOODEN PLANKS





24 x 48 | ELT – Stoneage Dunes





6 x 37 | E-WP-003 | WOODEN PLANKS





24 x 24 | E-SC-LP-004 | LAPPATO



24 x 24 | E-SC-MI-002 DARK BROWN MATT | MICA







## BUILDING MATERIAL PRODUCTS

Stile Bond  
Grout  
Latex 73  
and  
Epoxy Flooring



# Stile Emporium & Design Studio



**BAHAWALPUR EMPORIUM**



# BAHAWALPUR EMPORIUM

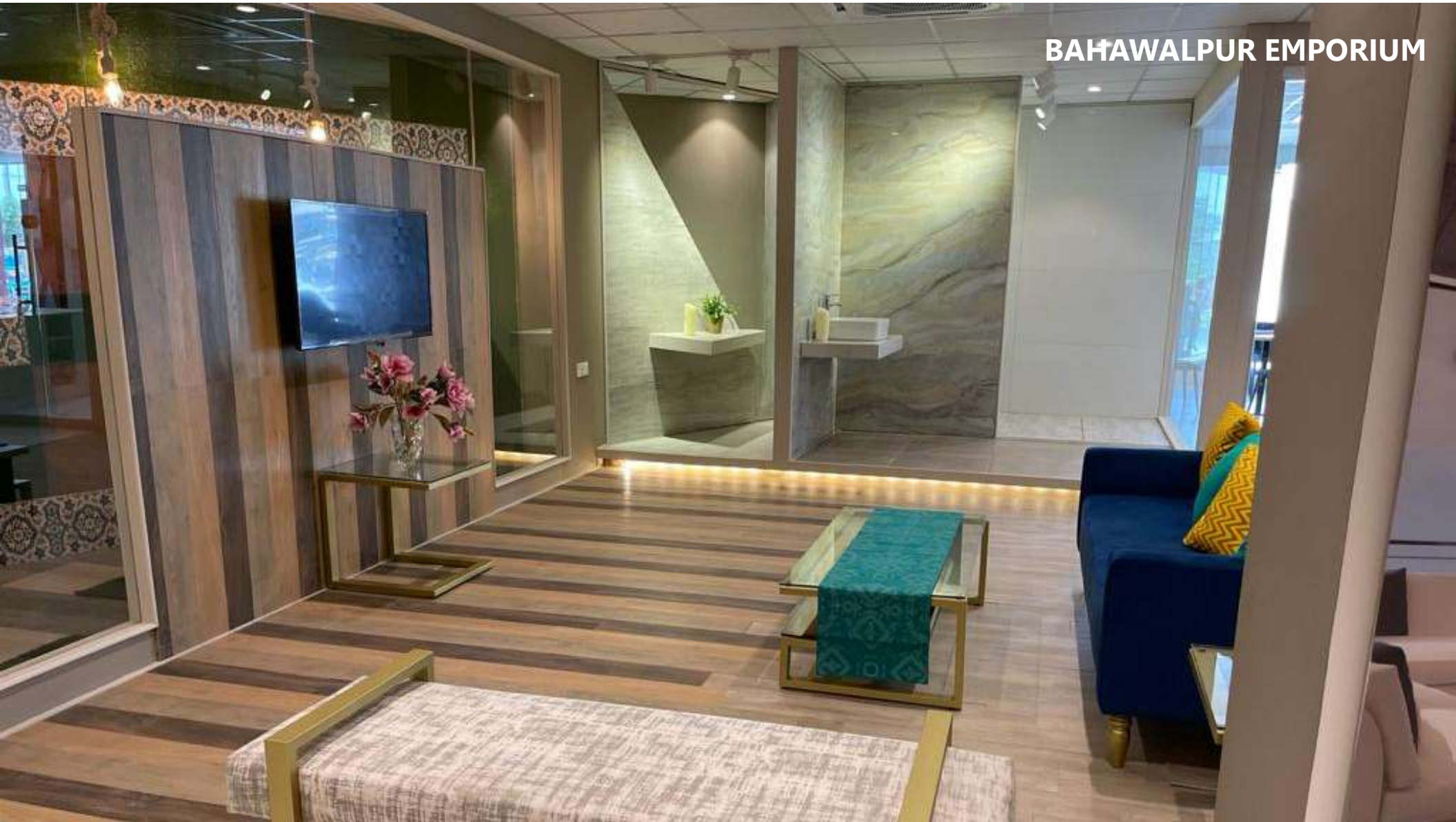




# BAHAWALPUR EMPORIUM

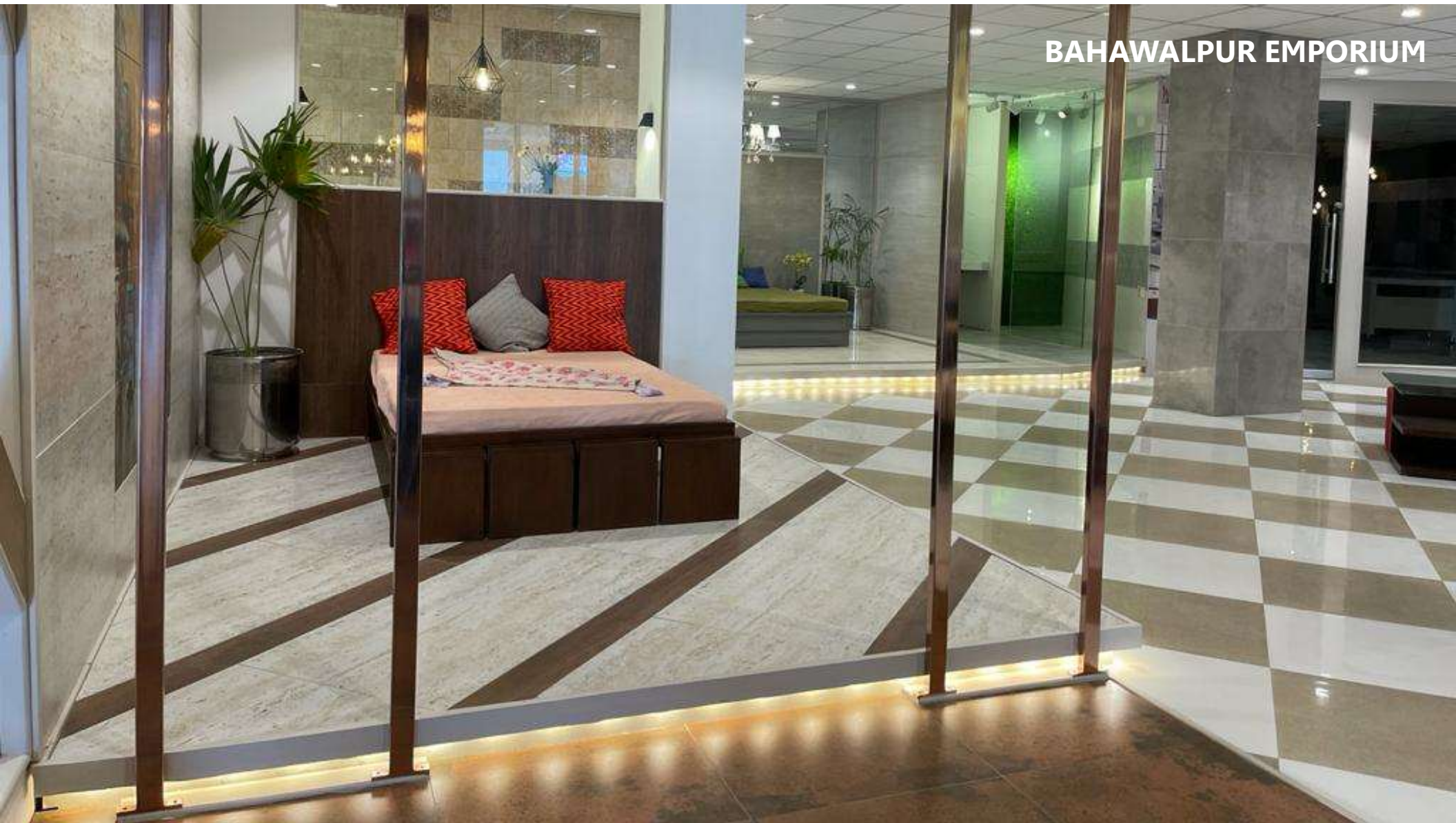


BAHAWALPUR EMPORIUM





**BAHAWALPUR EMPORIUM**

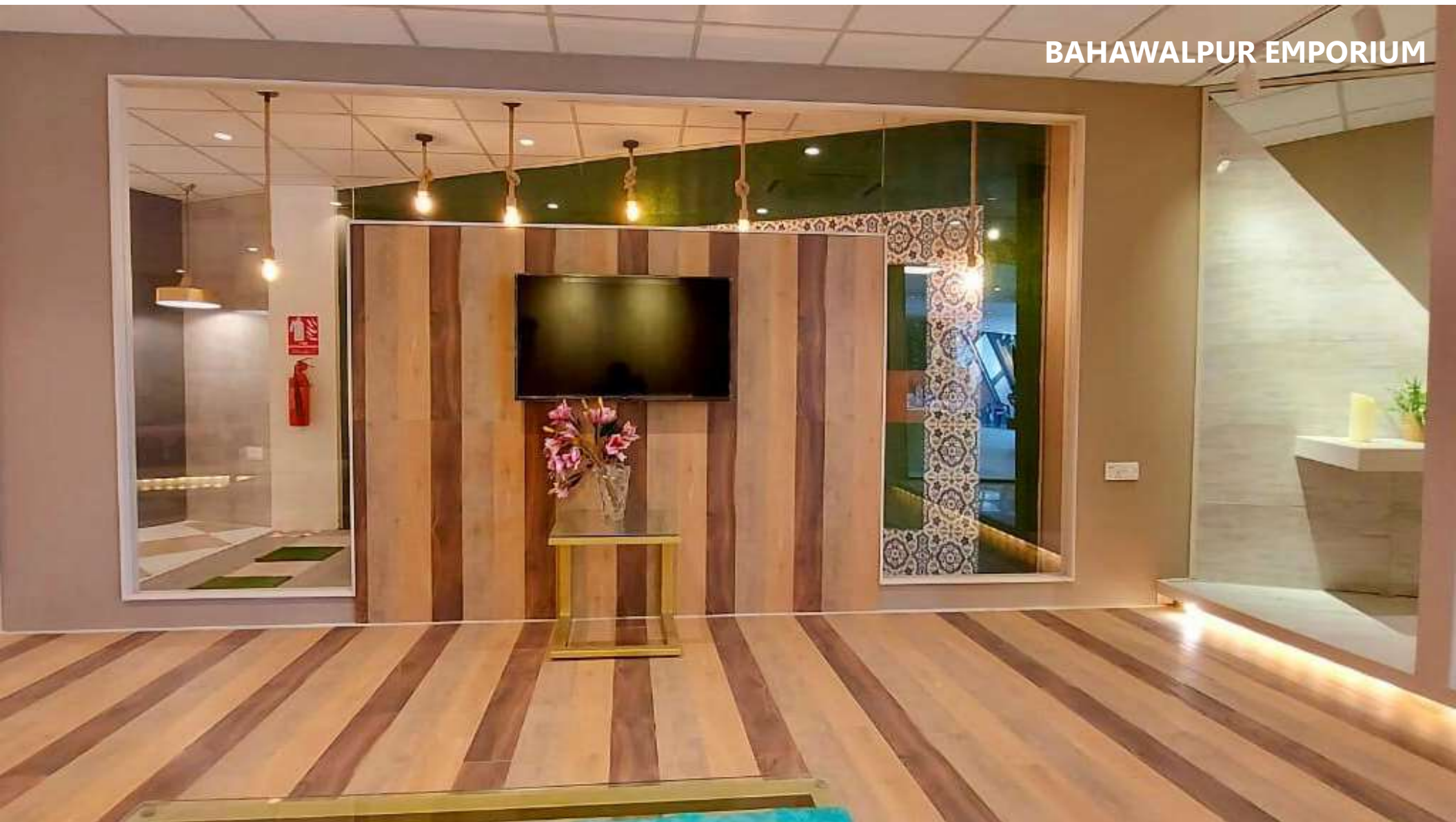




**BAHAWALPUR EMPORIUM**

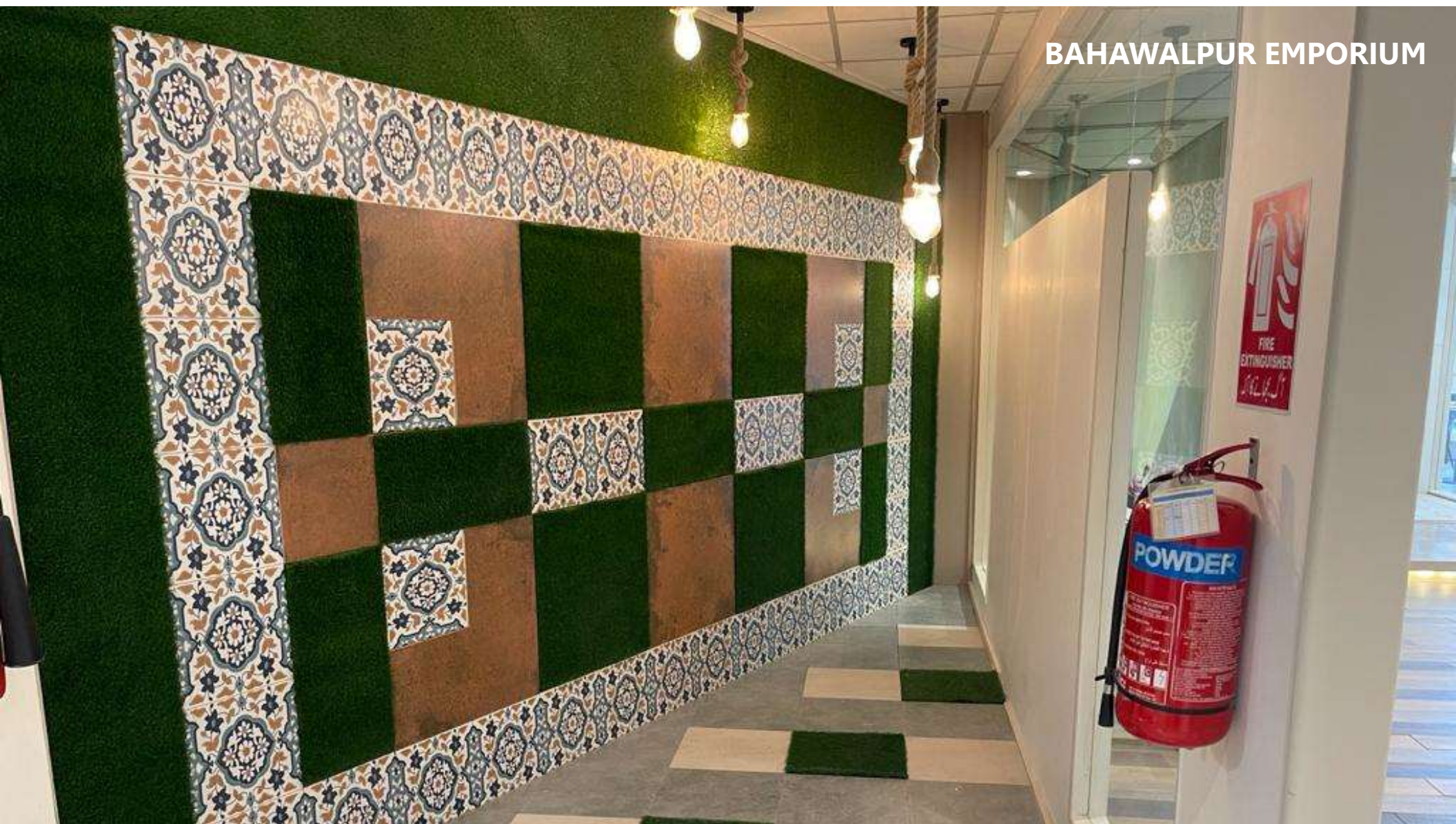


# BAHAWALPUR EMPORIUM





# BAHAWALPUR EMPORIUM





# MULTAN EMPORIUM







## PESHAWAR EMPORIUM







**DHA BUKHARI – KARACHI EMPORIUM**





VISIT OUR SAFE  
**STILE EMPORIUM & DESIGN STUDIO**  
WITH YOUR FAMILY  
&  
UPGRADE YOUR LIFESTYLE WITH STILE TILES

PROVIDING YOU WITH  
A SAFE SHOPPING ENVIRONMENT

THERMAL SCANNING



MANDATORY WEARING OF MASK



SANITISING STATION



FREQUENT EMPORIUM CLEANING  
AND DISPLAY SANITISATION





INTRODUCING FOR THE  
**FIRST TIME IN PAKISTAN**  
STILE ONLINE EMPORIUM



# DIGITAL TRANSFORMATION

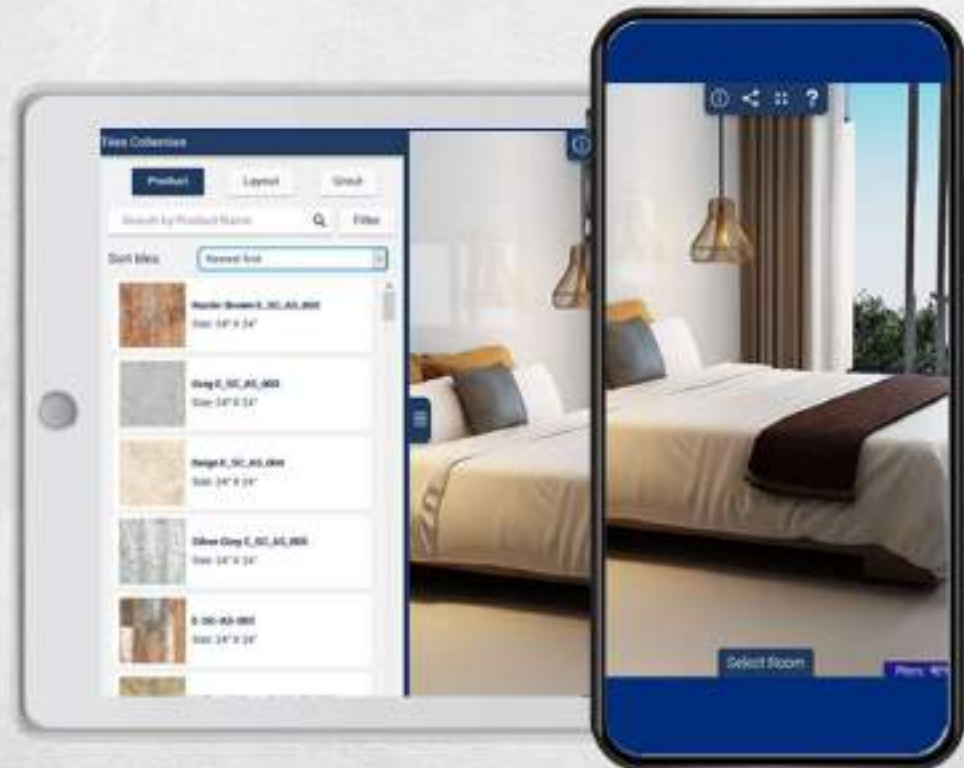


# VISUALIZER

## STILE TILE VISUALISER

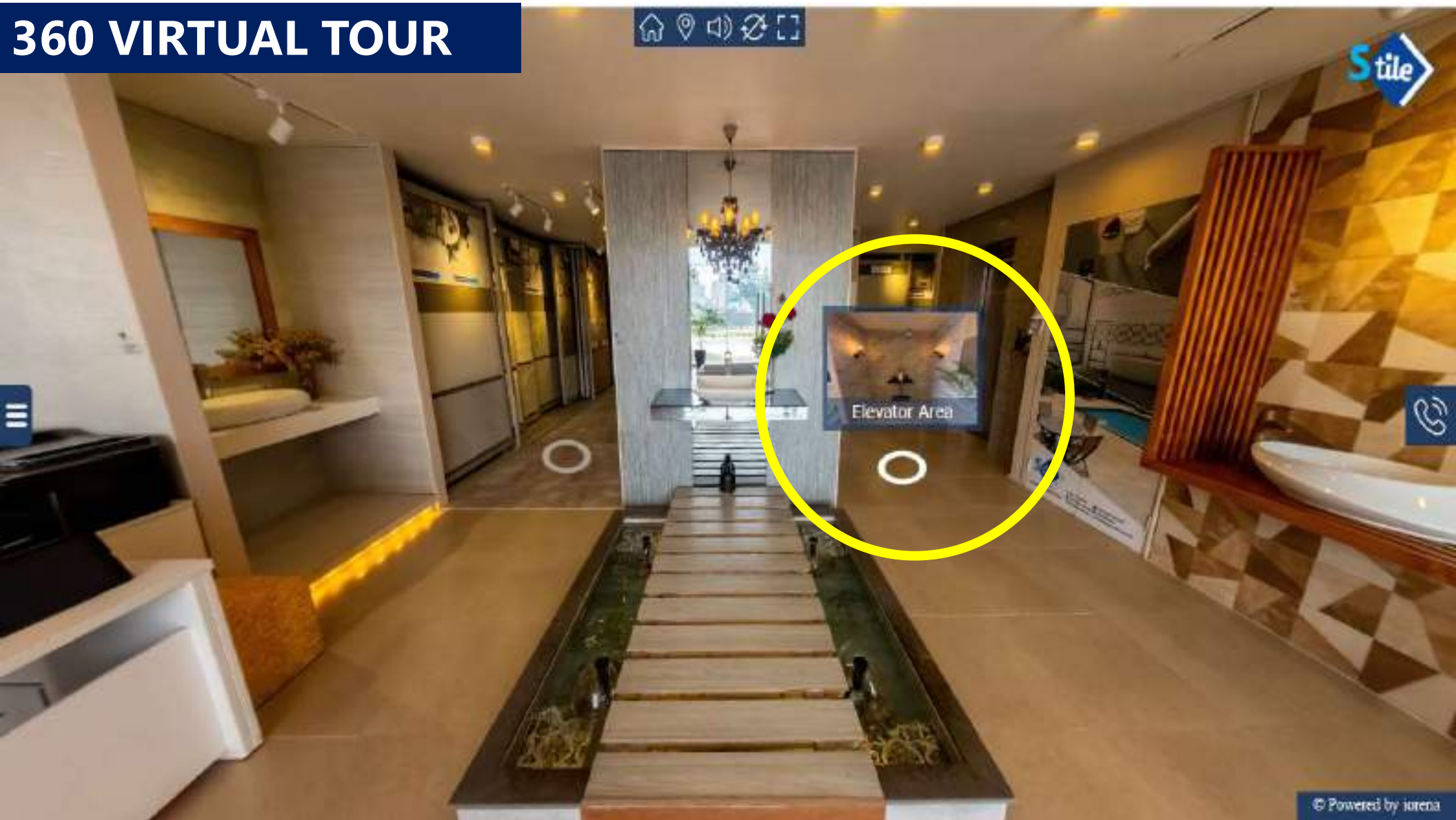
NOW CONVERT YOUR  
INSPIRATION INTO

# REALITY!





# 360 VIRTUAL TOUR



# 360 VIRTUAL TOUR





# ARCHITECTS USING VISUALIZER







# SOCIAL MEDIA PRESENCE

8.2M

People reached

▲ 70.3% from previous 345 days

18.1K

Net followers

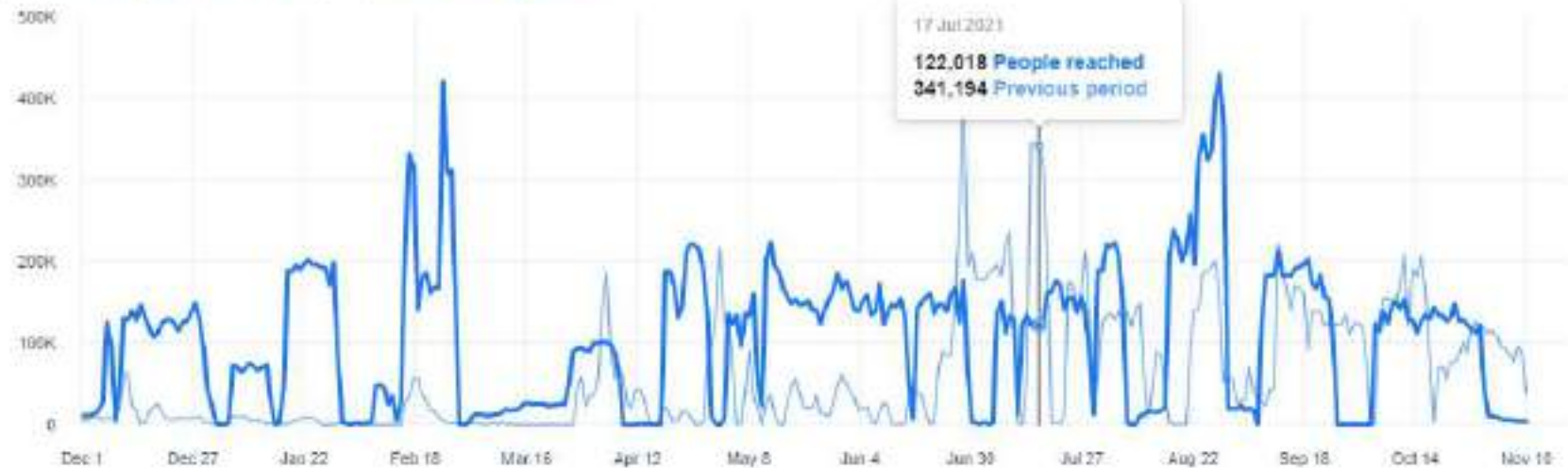
▲ 25.3% from previous 345 days

facebook

## People reached

1 Dec 2020 - 10 Nov 2021

8,223,001 People reached 4,827,713 Previous period





stiletilesceramic

Edit Profile



365 posts

4,729 followers

1 following

Stile Tiles &amp; Ceramics Ltd.

The Leading Brand of Porcelain, Vitrified &amp; Ceramic Tiles that empowers people to redefine lifestyle choices of their living spaces.

[www.stile.com.pk](http://www.stile.com.pk)[www.stile.com.pk/emporium-locator](http://www.stile.com.pk/emporium-locator)

Emperiums



Archi Talks



kStile



Stile at DMC



StilexShani...



The Design...

POSTS

VIDEOS

SAVED

TAGGED







# ENGAGEMENT WITH ARCHITECTS RECOMMENDING STILE PRODUCTS



Renowned architect, Nayyar Ali Dada shares his idea and inspiration towards making a better Pakistan with Stile.

He is one of the most celebrated architects in Pakistan. He has received the Pride of Performance Award, Sitara-e-Imtiaz and Hilal-e-Imtiaz and is the pioneer in revolutionizing the field of architecture in our country.

Pakistan  
ka  
Stile



Nayyar Ali Dada  
ARCHITECT



Unmatched Quality Tiles

Renowned Pakistani Architect,  
Mr. Shahid Abdulla shares his ideas and  
inspirations towards making a better  
Pakistan with Stile Tiles & Ceramics Ltd.

Shahid Abdulla has excelled at the  
Architecture and Interior Design for many  
notable projects. He is also one of the  
founding members of The Citizens  
Foundation (TCF), The Hunar Foundation  
(THF), The Indus Valley School of Art and  
Architecture and The Institute of Interior  
Designers. Relocating the 100-year-old  
Nusserwanjee building was also one of  
his feats.

Pakistan  
ka  
Stile



**Shahid Abdulla**  
ARCHITECT





Unmatched Quality Tiles

Renowned Pakistani Architect, Yasmeen Lari shares her idea and inspiration towards making a better Pakistan with Stile Tiles & Ceramics Ltd.

She is the first female architect of Pakistan, receiver of Sitara-i-Imtiaz and Founder of the Heritage Foundation, Pakistan. She has excelled at the architecture and interior design of many notable projects including the PSO House and FTC Building.

Pakistan  
ka  
stile



**Yasmeen Lari**  
ARCHITECT



Unmatched Quality Tiles

Renowned Pakistani Architect,  
Mr. Akeel Bilgrami shares his idea and  
inspiration towards making a better  
Pakistan with Stile Tiles & Ceramics Ltd.

He is one of the founders of the Indus  
Valley School of Art & Architecture (IVS),  
Karachi. Throughout his architectural  
practice, he has promoted sustainable  
design solutions.

His projects have been showcased in  
national and international architecture  
journals and on the electronic media.

Pakistan  
ka  
Stile



Akeel Bilgrami  
ARCHITECT

## **FOCUS AREAS – WAY FORWARD**

### **DIRECT SALES**

**Business expansion  
of emporiums and  
direct sales to  
projects**

### **PRODUCT MIX**

**Improve product  
mix to improve  
overall margins**

### **EFFICIENCY**

**Bring in cost  
efficiency to offset  
inflation**

### **VOLUMES**

**Sustain the  
Optimized volumes**

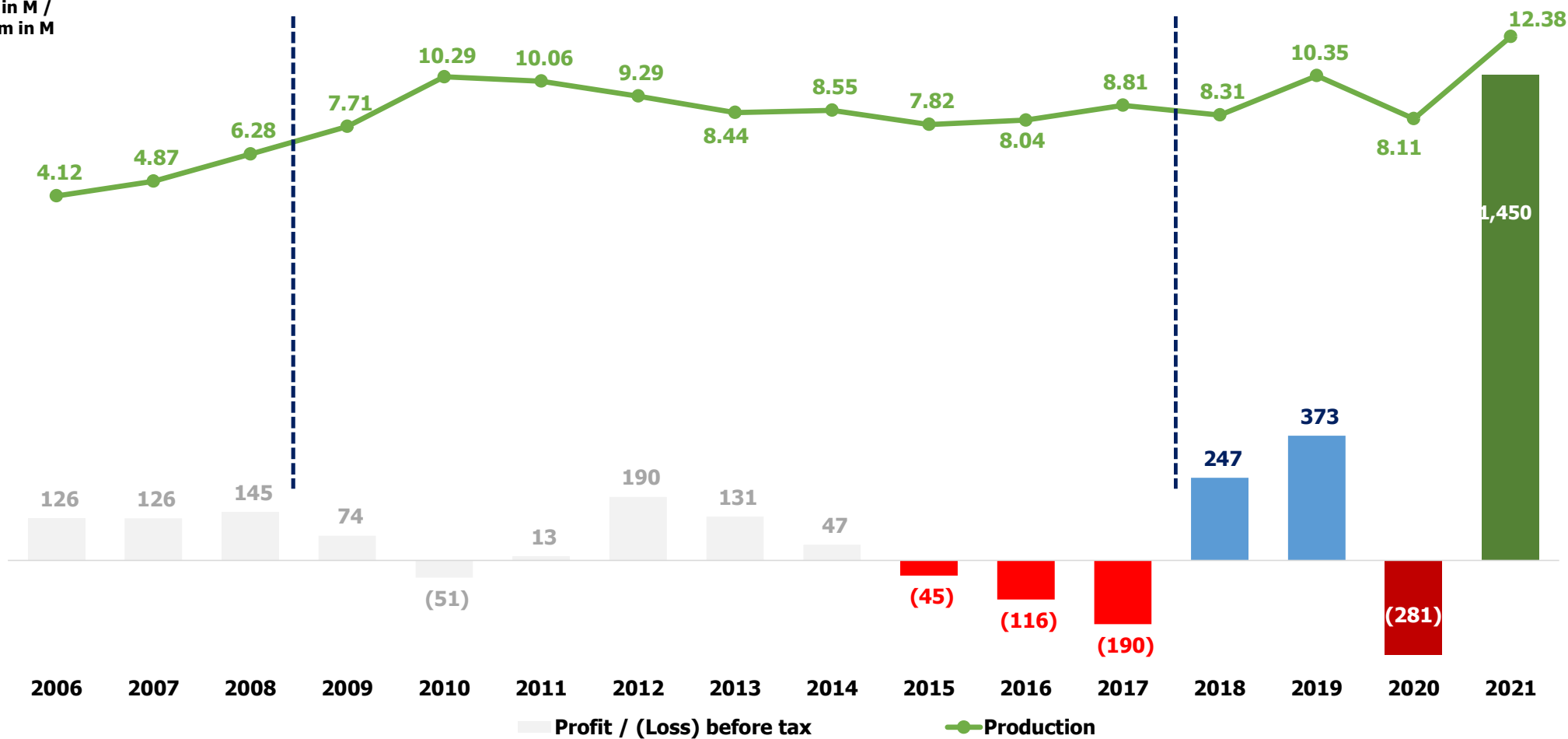


# **FINANCIAL HIGHLIGHTS**



## STILE EVOLUTION

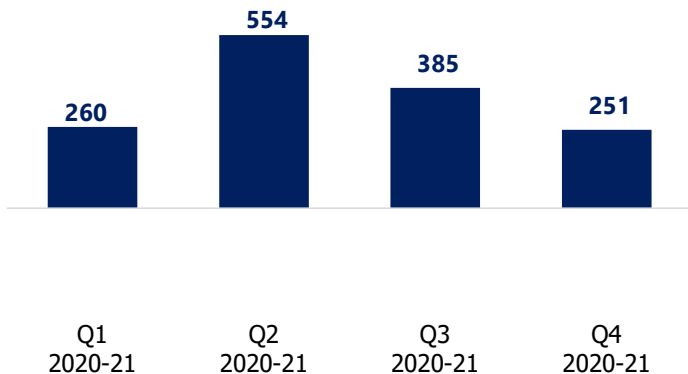
Rs in M /  
Sqm in M



## KEY HIGHLIGHTS

FY 2020-21

Rs in Million



**PROFIT  
BEFORE  
TAX**

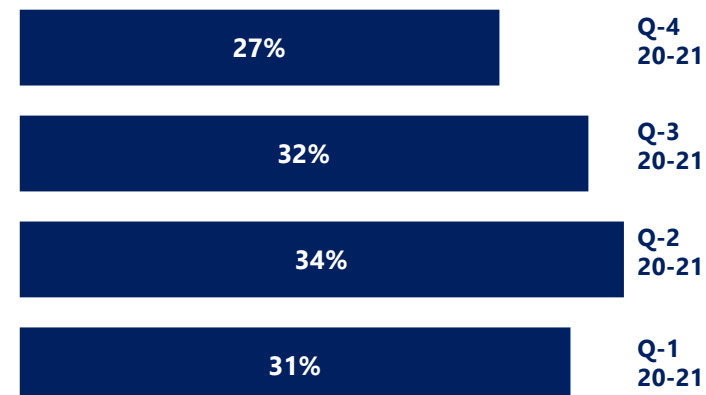
Y-T-D

**Rs. 1,450  
Million**

**GROSS  
MARGIN**

Y-T-D

Act : 31%  
Last : 17%



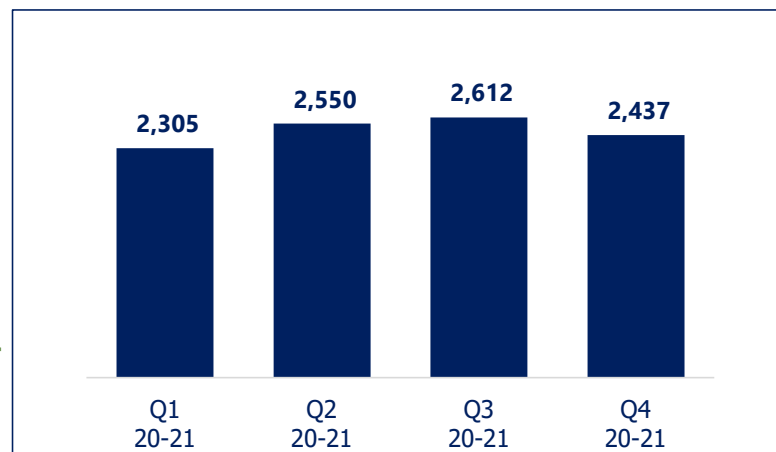
**Gross  
Revenue**

Rs in Million

Y-T-D

**Rs. 11,883  
million**

↑  
**52%**  
Last year





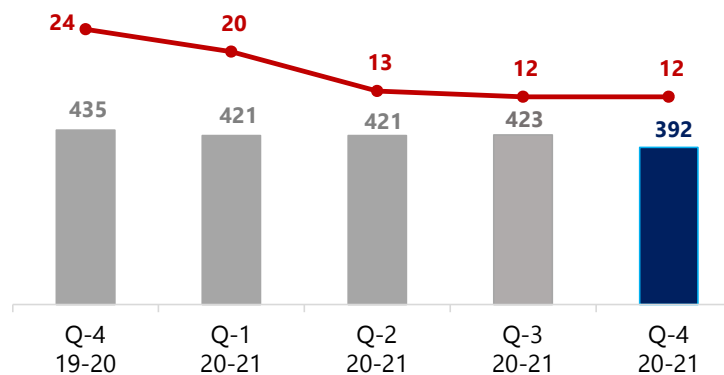
## KEY HIGHLIGHTS

2020-21

### DEBTORS

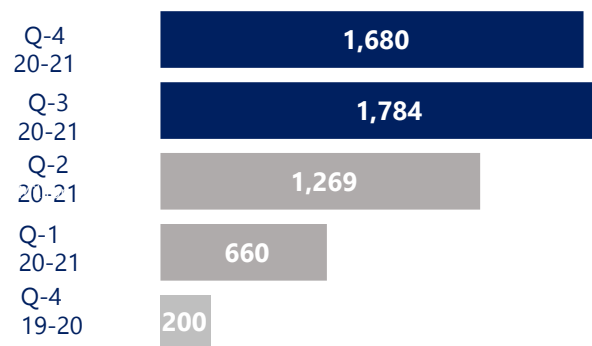
Rs in Million and  
No of Days

Rs in Million



### SHORT TERM INVESTMENT

Rs in Million

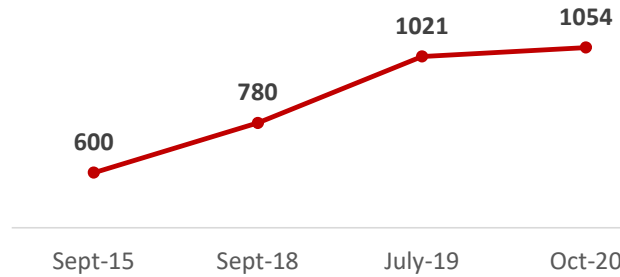


# **KEY CHALLENGES**

## KEY CHALLENGES

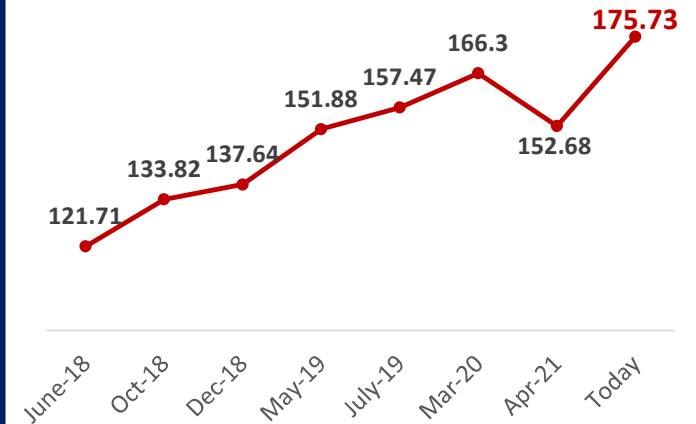
### GAS TARIFF

Rs./MMBTU



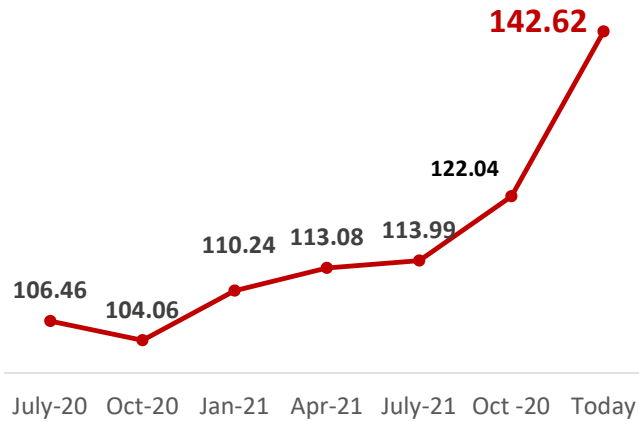
### RUPEE DEVALUATION

Rs./USD



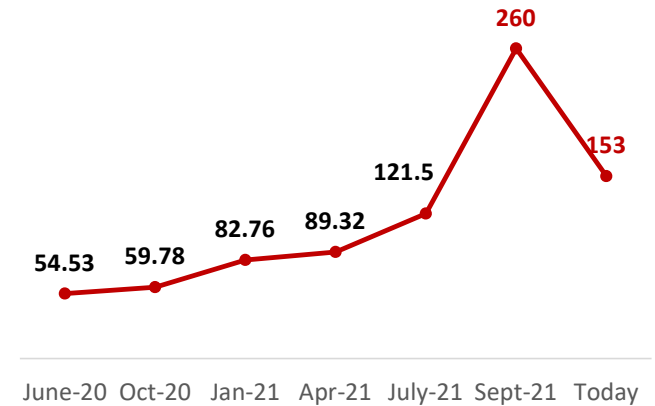
### DIESEL PRICE TREND

Rs./USD



### COAL PRICE TREND

Rs./USD





# KEY CHALLENGES – 2021-22



## **1. MARKET CHALLENGES**

- REQUIREMENT OF GETTING DEALERS TO BE REGISTERED UNDER SALES TAX ACT 1990
- NO SALES BEYOND Rs. 10 MILLION PER MONTH / Rs. 100 MILLION PER MONTH TO UNREGISTERED PERSON
- IMPACT OF 108B OF INCOME TAX ORDINANCE 2001
- NEW LOCAL ENTRANTS WITH UNETHICAL MARKET PRACTICES
- RELUCTANCE ON PROVIDING CNICs.

## **2. COST IMPACTS:**

- VULNERABLE EXCHANGE RATE PARITY
- CONTINUOUS INCREASE IN COST OF ALTERNATE ENERGY (COAL/LPG/LNG)
- INCREASE IN ENERGY PRICES
- UNSTABLE GAS PRESSURES
- NON-AVAILABILITY OF VESSELS AT INTERNATIONAL PORTS RESULTING IN INCREASED OCEAN FREIGHT
- GIDC – UNCERTAINTY

## **3. COMPETITION**

- NO LEVEL PLAYING FIELD FOR ALREADY ESTABLISHED TILES MANUFACTURERS (Facilitation to new industries establishing in SEZs)
- BUSINESS PRACTICES OF LOCAL COMPETITION – DEALING WITH UNDOCUMENTED ECONOMY
- SMUGGLING FROM NEIGHBOURING COUNTRIES
- LOW ITPs OF TILES IMPORTED FROM ALL ORIGINS



Q&A

THANK YOU!