



# Results Briefing Materials

FY03/2018 3Q Results

Oisix.daichi Inc.

# Farm for Tomorrow, Table for Tomorrow

We provide services that enable a better food life for more people.

We realize a society where good farmers are rewarded and proud.

We evolve continuously to deliver a sustainable framework that links farm and table.

We solve social issues related to food through business approaches.

We create and expand Tomorrow's Food.

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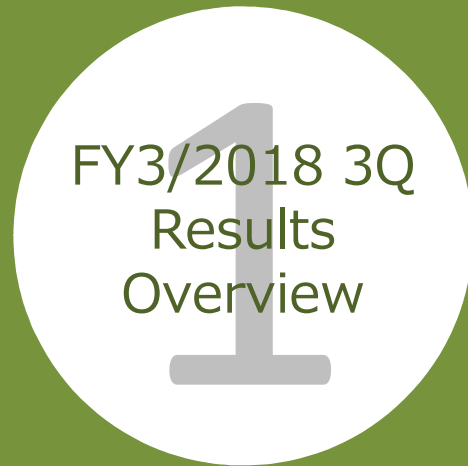
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## 1. Consolidated Results Overview

## 2. Results Overview by Segment

- **Summary**
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- **Daichi wo Mamoru Kai (DMK) KPI**

# 1. FY3/2018 3Q Results Overview

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# FY3/2018 3Q Results Overview

- With the addition this term of Daichi wo Mamoru Kai's (DMK) results, sales were up +75.3% YoY. Sales & earnings were ahead of plan, driven by *Osechi* sales & robust subscriber numbers.
- Achieved Operating Profit forecast for the year, EBITDA was up +58.3% YoY.

(Units: ¥mn)	FY3/2017 3Q Actual	FY3/2018 3Q Actual	FY3/2018 Plan	+/- YoY	YoY %	Plan Achievement Rate
<b>Sales</b>	17,113	<b>30,007</b>	38,000	12,894	175.3%	79.0%
<b>Operating profit</b>	625	<b>692</b>	670	67	110.7%	103.3%
<b>EBITA※1</b>	654	<b>981</b>	1,020	327	150.0%	96.2%
<b>EBITDA※2</b>	810	<b>1,282</b>	1,390	472	158.3%	92.2%
<b>Excluding extraordinary factors ※3</b>	-	<b>1,459</b>	1,570	-	-	92.9%
<b>EBITDA per share (¥)</b>	137.89	<b>160.22</b>	175.11	22.33	116.2%	91.5%

※1 EBITA = Operating profit + amortisation of goodwill

※2 EBITDA = Operating profit + depreciation + amortisation of goodwill

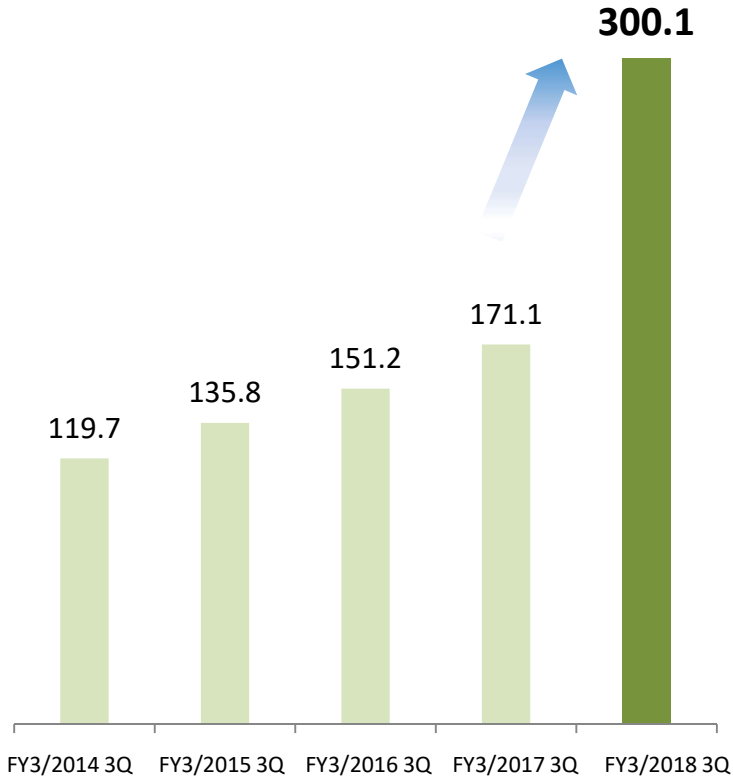
※3 Extraordinary factors = One-off merger-related costs (cost of moving HQ, etc.)

# Consolidated Sales & EBITDA Trends

Robust Oisix new subscriber acquisitions delivered +75.3% YoY growth in sales & +58.3% YoY growth in EBITDA

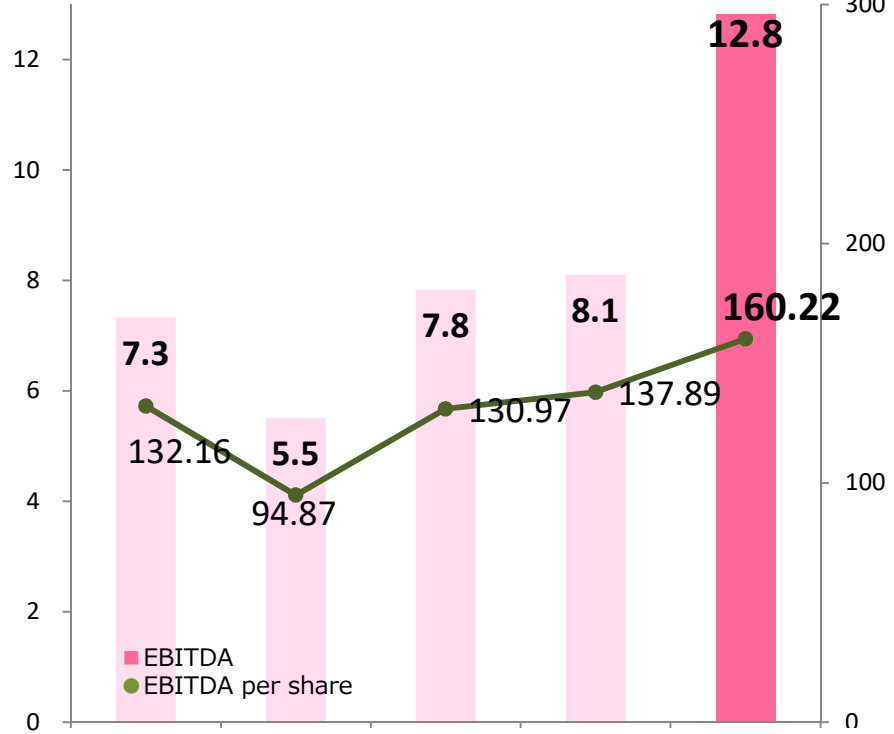
## Sales

FY3/2018 3Q YoY  
**¥30.01bn** **+75.3%** (¥'00mn)



## EBITDA/EBITDA per share

FY3/2018 3Q YoY  
**¥1.28bn** **+58.3%** (¥)



※ EBITDA = Operating Profit + depreciation + amortisation of goodwill



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# FY3/2018 3Q Results Overview by Segment

- Oisix: Sales above plan thanks to robust subscriber growth. Strength in new customer acquisitions saw an increase in sales of high CoGS trial boxes, which translated into slightly low marginal profits.
- DMK: Conservative forecasts translated into above plan sales & marginal profits.

	FY3/2018 3Q	Plan	Actual	Achievement rate
Home Delivery Business				
Oisix				
	Sales	23,988	18,481	77.0%
	Marginal profit	3,465	2,421	69.9%
	Margin (%)	14.4	13.1%	-
DMK				
	Sales	10,841	8,508	78.5%
	Marginal profit	2,039	1,650	80.9%
	Margin (%)	18.8	19.4%	-
Other Business				
	Sales	3,171	3,017	95.1%
	Marginal profit	629	571	90.8%
	Margin (%)	19.8	18.9%	-
Company total				
	Total sales	38,000	30,007	79.0%
	Marginal profit	6,133	4,644	75.7%
	Margin (%)	16.1	15.5%	-
	Fixed costs (※1 )	5,463	3,951	72.3%
	Operating profit	670	694	103.6%

※1 Includes amortisation of goodwill (included in each business segment in the *kessan tanshin* & quarterly reports)

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# Oisix: Subscriber Trends

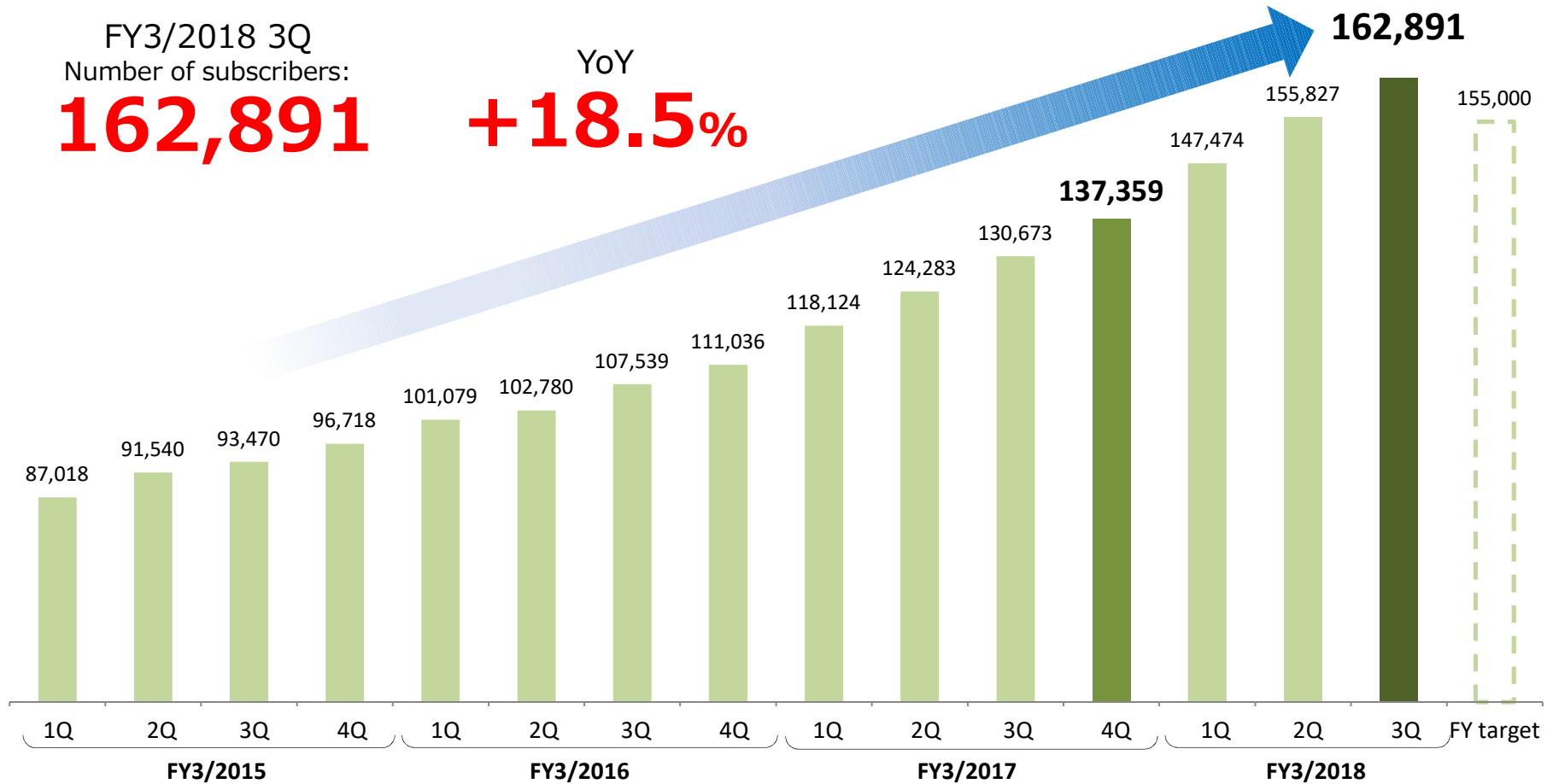
There was accelerated growth in subscriber numbers on the back of widening awareness of Kit courses via media exposure and the growing popularity of meal kits.

FY3/2018 3Q  
Number of subscribers:

**162,891**

YoY

**+18.5%**

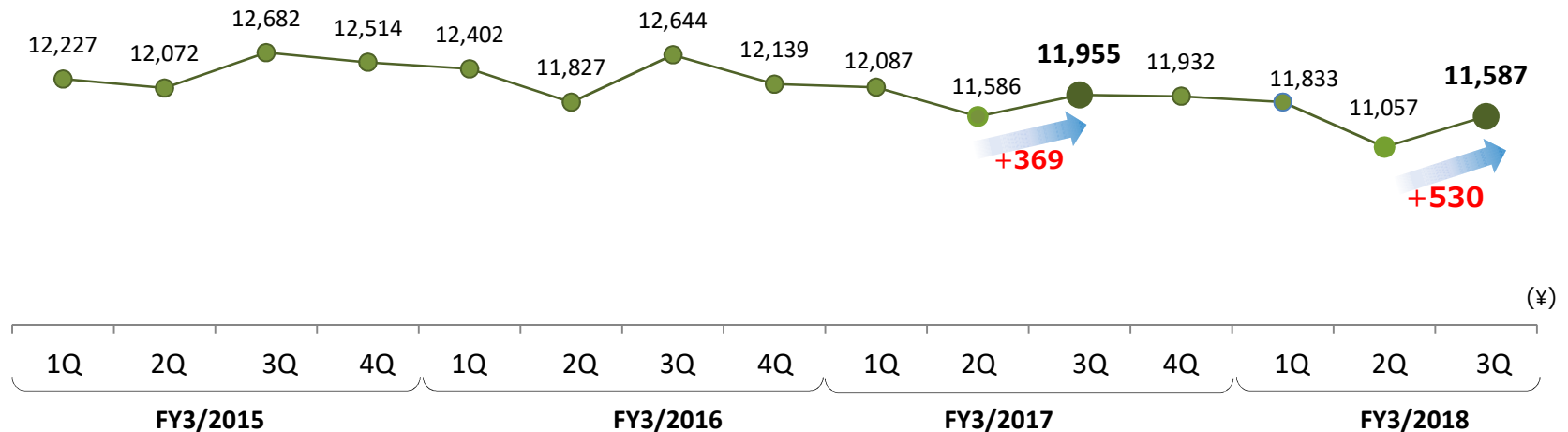
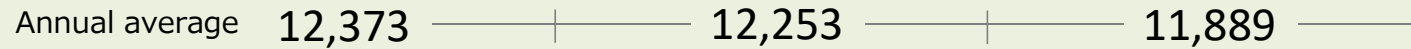


※ What are meal kits? : A meal package containing a recipe, pre-prepared ingredients & seasonings for a set number of people.

# Oisix: ARPU Trends

On strong year-end sales, QoQ ARPU expansion in 3Q saw improvement. But the healthy acquisition of new subscribers meant an increase in the weight of lower-value monthly orders typical of beginners. YoY contraction resulted.

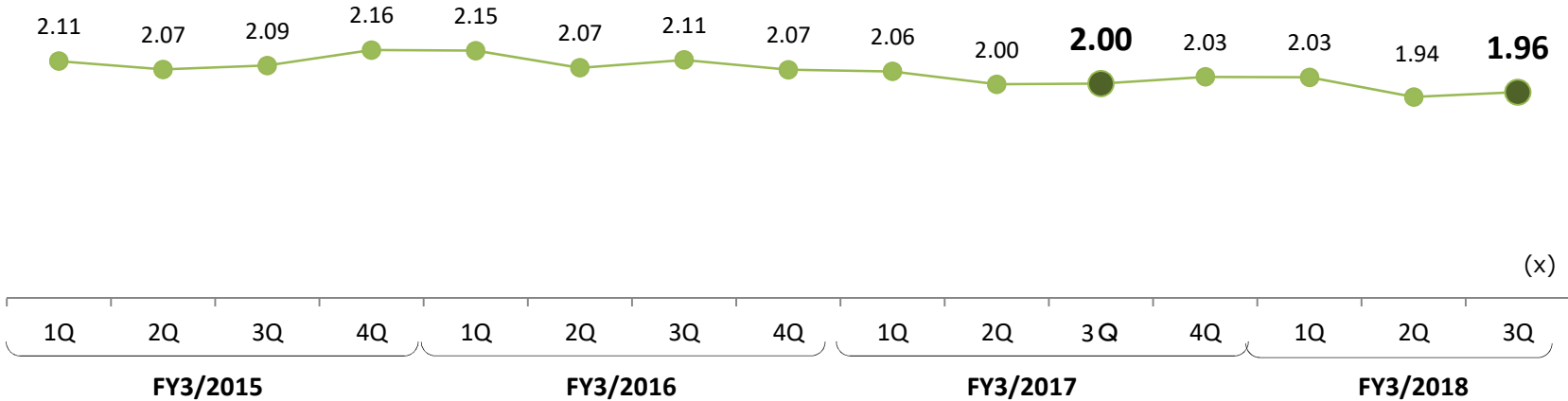
FY3/2018 3Q      YoY  
**¥11,587**    **96.9%**



※ARPU : Average Revenue Per User  
 ※Regular subscriber frequency of purchase x amount spent/purchase

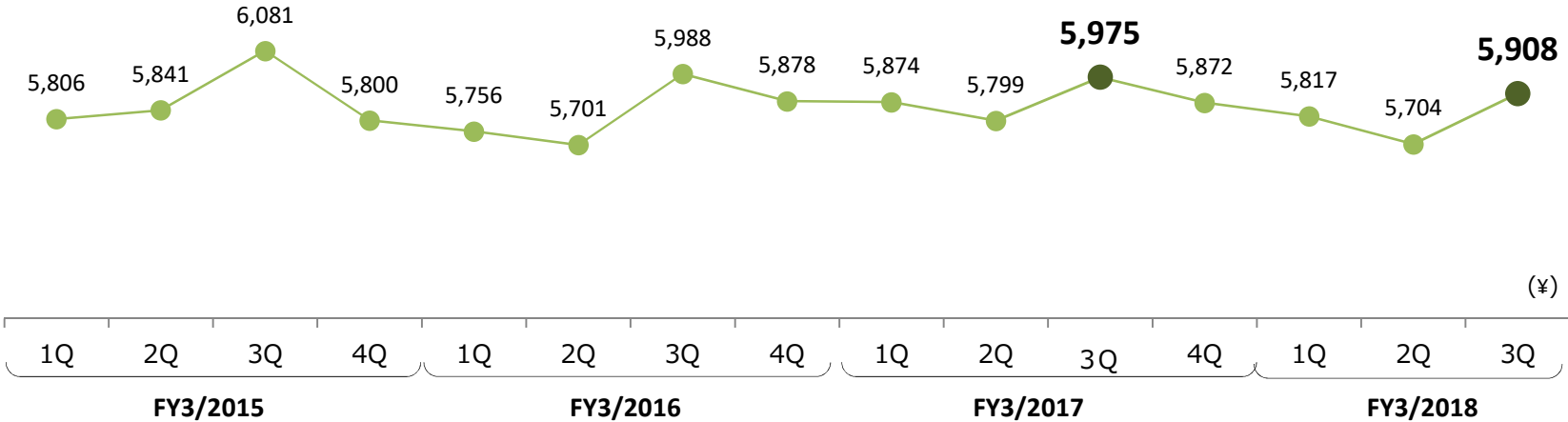
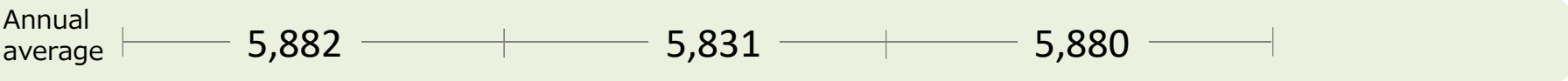
# Oisix: Frequency of Purchase (FoP) Trends

FY3/2018 3Q      YoY  
**1.96x**      **98.0%**



# Oisix: Average Customer Spend (Basket) Trends

FY3/2018 3Q      YoY  
**¥5,908**    **98.8%**



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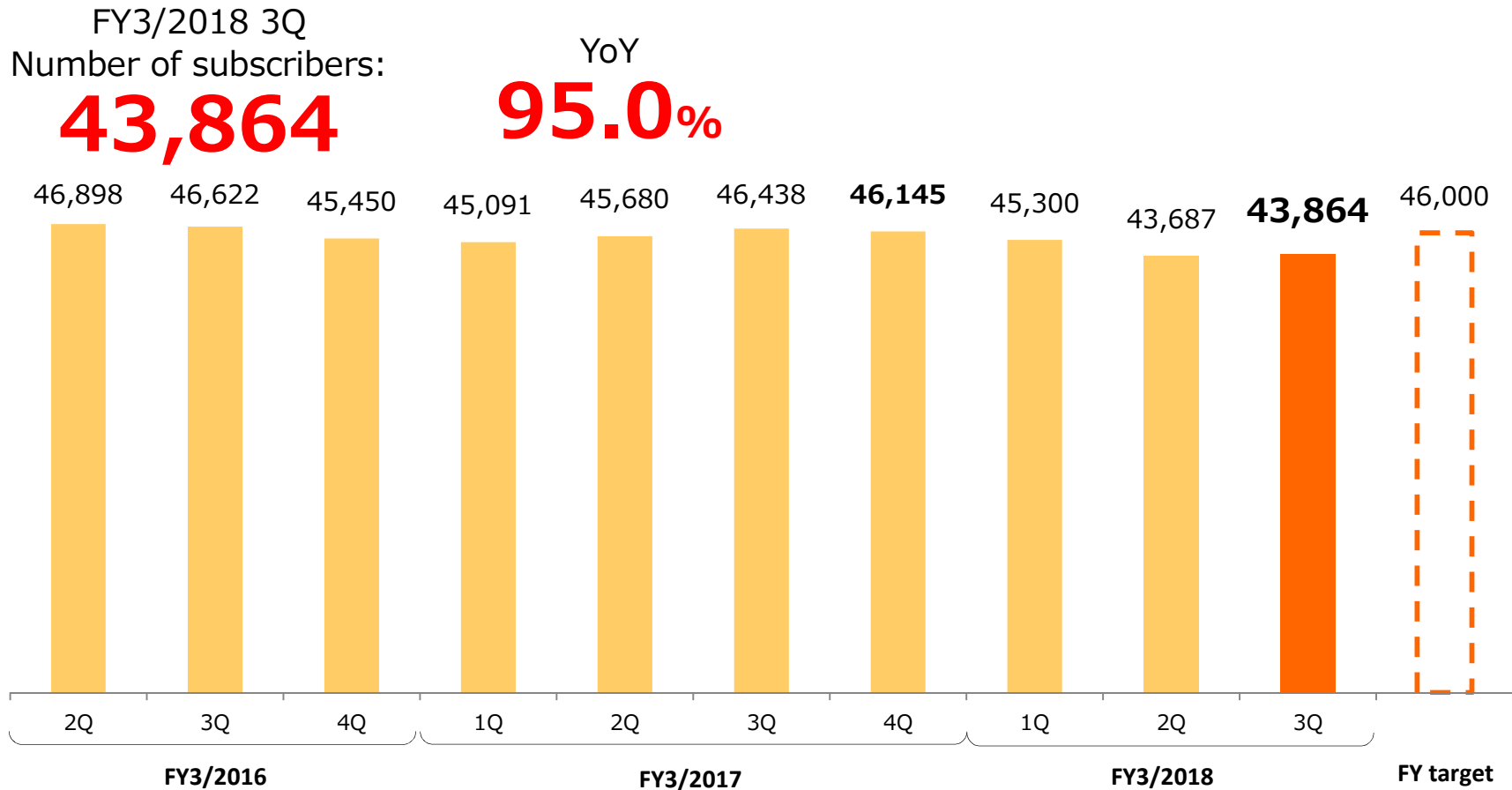
## 2. Results Overview by Segment

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- **Daichi wo Mamoru Kai (DMK) KPI**



# DMK: Subscriber Trends

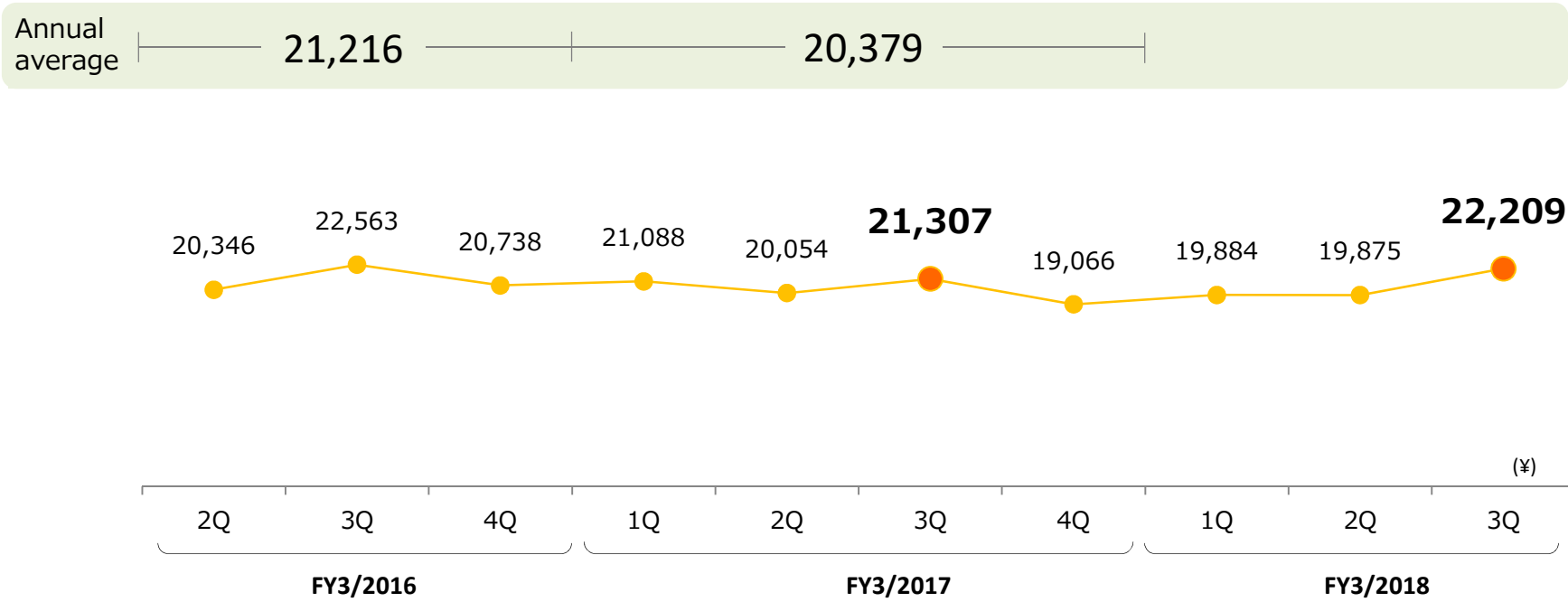
With unit acquisition costs coming under control, subscriber acquisition activity was reinitiated. Whilst slight, subscriber numbers have begun an upward trend.



# DMK: ARPU Trends

ARPU improved QoQ thanks to strong year-end sales. Improvement in the average customer spend has translated into a YoY ARPU improvement.

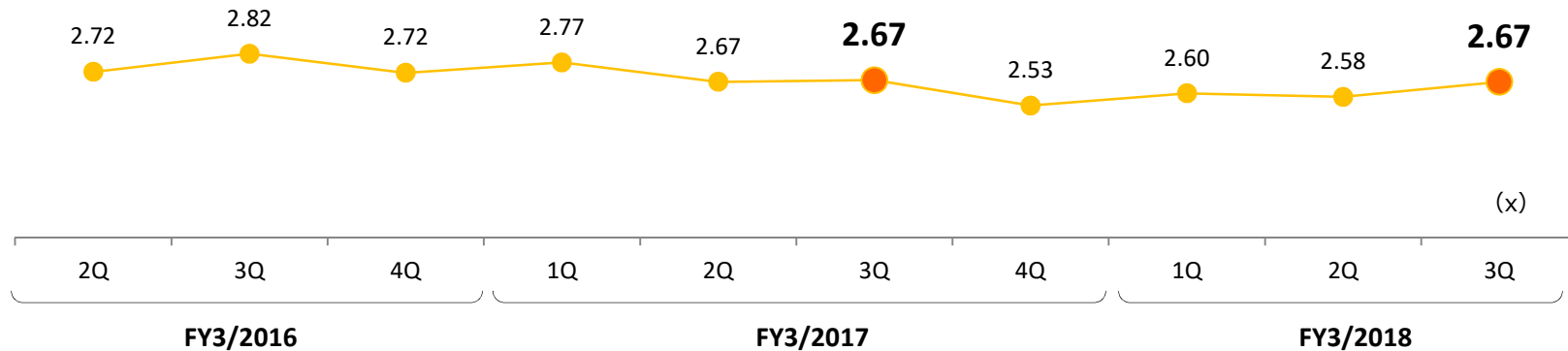
FY3/2018 3Q YoY  
**¥22,209 104.2%**



※ARPU : Average Revenue Per User  
 ※Regular subscriber frequency of purchase x amount spent/purchase

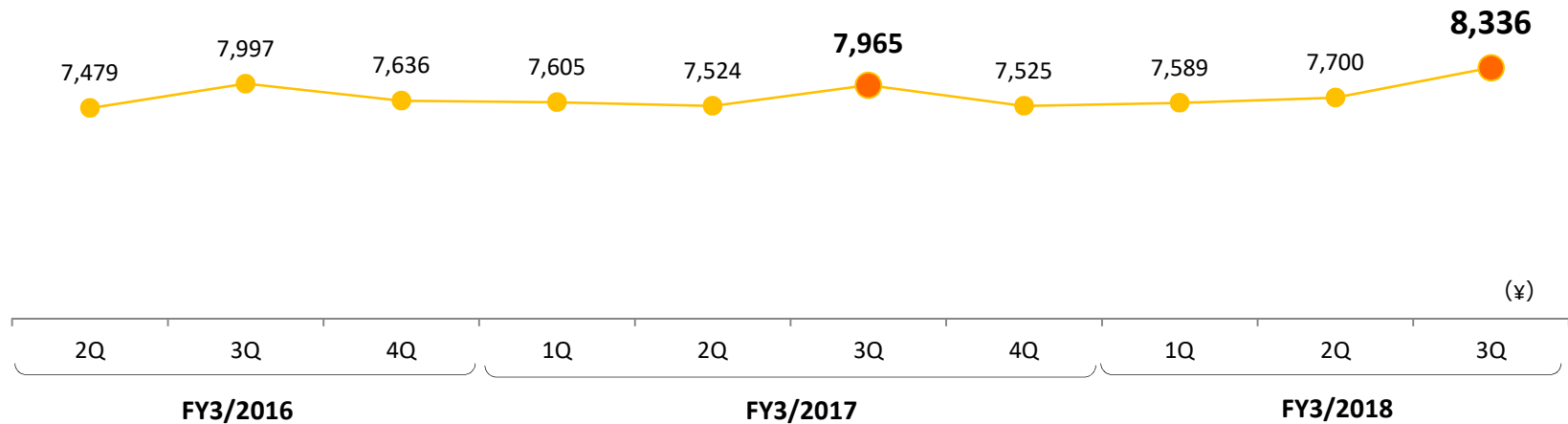
# DMK: Frequency of Purchase (FoP) Trends

FY3/2018 3Q YoY  
**2.67x** **100.0%**



# DMK: Average Customer Spend (Basket) Trends

FY3/2018 3Q YoY  
**¥8,336 104.6%**



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# TABLE FOR TWO (TFT)

Oisix donates 3% of revenue to TFT from the sale of TFT-accredited products purchased by our customers. The proceeds are used to fund meals and the construction of dining facilities for children in developing countries to eat.



TO DATE, OISIX HAS DELIVERED (AS AT END OF DECEMBER 2017)

**APPROX. 3.99 MILLION LUNCHES**

\*Cumulative 2009 – December 2017 1 lunch = ¥20



# Hosting of Tokyo Harvest 2017 !

Tokyo Harvest 2017, a harvest festival to express our thanks and respect to farmers, was hosted at the Roppongi Hills Arena. The event was covered by numerous TV & media companies, including NHK & TV Tokyo.



2017 was the event's fifth year. A variety of contests that involved eating, playing or learning about Japanese food culture were held for the enjoyment of all – from parents with small children to visitors from overseas. There were 30 stalls from which to buy food & ingredients.

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# FY3/2018 Strategy & Action

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- (1) Oisix : Strengthen value of *Premium Jitan*
- (2) *Osechi* sales
- (3) Daichi wo Mamoru Kai: Reform earnings structures

## **2. Action to Create Synergy**

## **3. Non-*takuhai* Business Growth Strategy**

- (1) Real retail (Physical Stores, Wholesale)
- (2) Overseas business
- (3) Novelty business

## **4. Tokushimaru**

# FY3/2018 Strategy & Action

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# (1) Oisix : Strengthen Value of *Premium Jitan*

## ■ What is Kit Oisix?

Recipes and ingredients for main and side dishes in just 20-minutes

*Kit Oisix*



※2013年7月～2017年12月上旬までの総出荷数

**point 1** Includes recipe for cooking main/side dishes in just 20-minutes.

**point 2** Have only what you need in optimal form! Lots of vegetables to boot!




**point 3** Encountering a new repertoire ... together.

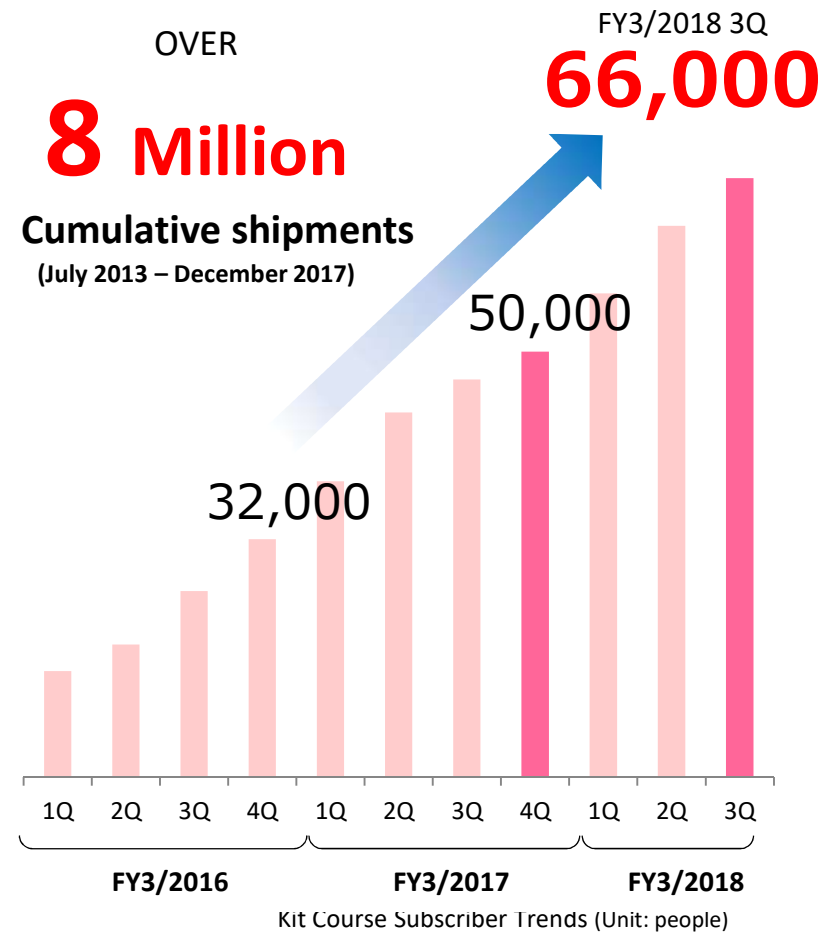
※ What is Premium Jitan? : Not only do Premium Jitan kits shorten cooking time, they also provide the reassurance, safety & deliciousness of Oisix standards, whilst resolving the stress associated with menu planning, buying ingredients, cooking, waste reduction, and tidying up. There is a top quality, large, and varied menu of time-saving Premium Jitan kits for more robust meals.

# (1) Oisix : Enhancing Value of *Premium Jitan*

Sales have continued to expand on strength of well received new menus. Course subscriber numbers hit the 66,000 mark, surpassing the seasonal *shun* course figure of roughly 61,000.

## Kit Oisix: Examples

 <p>一風堂監修! 野菜たっぷり豚骨スープ鍋</p> <p>クール グリーンチェック 到着日保証 1人分673kcal 七大アレルギー: 卵、乳、小麦</p> <p>2人前 1,940円(税抜) 定期ボックス限定 3人前 2,740円(税抜) 定期ボックス限定</p>	 <p>とうもろこしモッツアレラ入りオリーブ鍋</p> <p>クール グリーンチェック 到着日保証 1人分889kcal 七大アレルギー: 乳、小麦</p> <p>2人前 2,380円(税抜) 定期ボックス限定</p> <p>こちらの商品は2人前のみ販売</p>
 <p>[Kit]かぼちゃときのこのチーズクリームスープ</p> <p>クール グリーンチェック 到着日+2日保証 1人分218kcal 七大アレルギー: 乳、小麦</p> <p>2人前 650円(税抜) 定期ボックス限定</p> <p>こちらの商品は2人前のみ販売</p>	 <p>主菜: 便利な肉巻き豆腐のオイスター焼 副菜: スプーンでどうぞ味噌じゃががぼちゃ</p> <p>冷凍 グリーンチェック 到着日+7日保証 1人分642kcal 七大アレルギー: 小麦</p> <p>2人前 1,380円(税抜) 売り切れました 3人前 1,980円(税抜)</p> <p>🛒 入れる</p>





# (1) Oisix : Enhancing Value of *Premium Jitan*

Jitan Mama, a site that supports working mothers, has opened in a 5 company collaboration. We are hiring staff to monitor merchandise and services aimed at busy mothers (and/or fathers).



P. G. C. D.

洗顔石鹸とファンデ。  
人をキレイにするのは  
どちらだろう。



## (1) Oisix : Enhancing Value of *Premium Jitan*

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Produced under Ippudo supervision, the 'Ippudo Supervised! Yasai Tappuri Veggy-pota Ramen' meal kit sold out in less than 24 hours!



By popular demand, new shipment made available on January 25<sup>th</sup>!

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***Oisix.daichi***



# (1) Oisix : Enhancing Value of *Premium Jitan*

Second in the 'Kit Oisix: Cooking for Couples' series, a warming 'Hokkori Pork Stew', was launched. The series is supervised by Unjash's Ken Watanabe.

期間限定  
11/23(木)  
朝 10:00 まで

渡部建監修

2人で  
つくる

第2弾

Oisix

ミールキット

が食べられるおためしセット

渡部建が今話題のミールキット  
第二弾として「2人でつくるKi

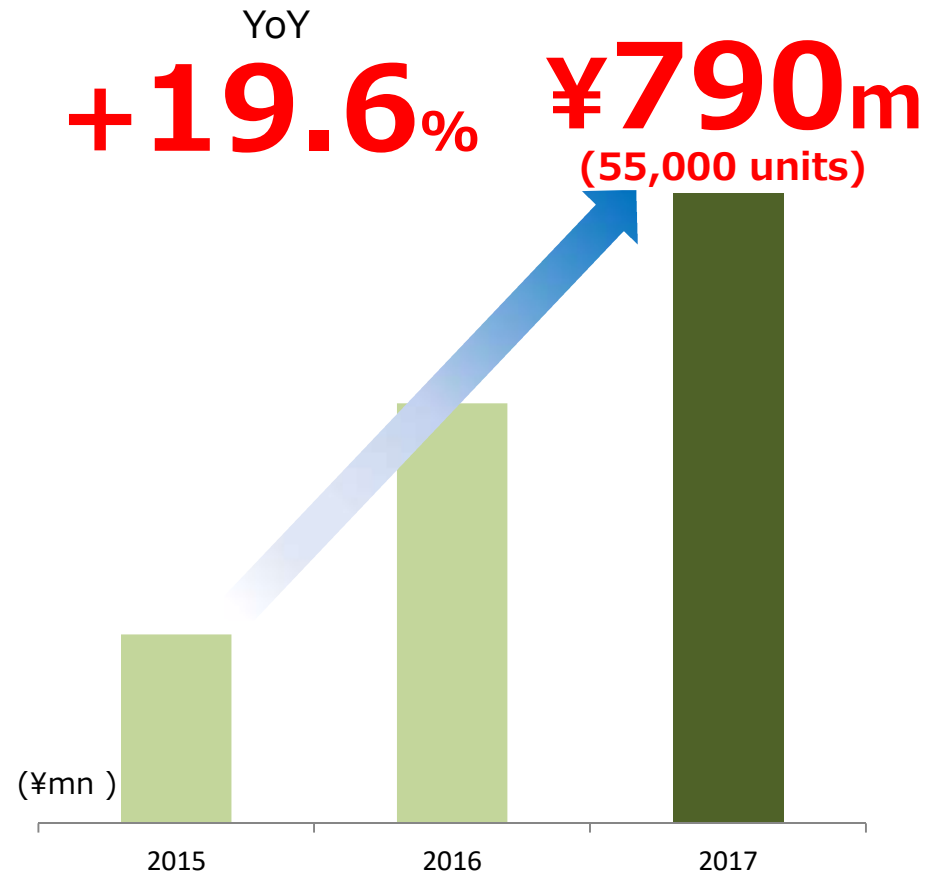


*Oisix.daichi*

## (2) Osechi Sales: Oisix

Initiatives including extension of selling period and LP\* improvements for higher CVR\*\* resulted in historical highs for unit volumes & sales (55,000 units & ¥790 million, respectively).

■ Takasago – No.1 for 4 years in a row



\*1 : LP . . . . Landing Page

\*\*2 : CVR . . . . Conversion Rate - indicator of proportion of purchases made or orders placed by visitors to the site.



## (2) Osechi Sales: DMK

Launched new 2-tier boxed product *Ayame* for two-person households.  
Posted historical highs for sales & unit volumes.

Sales **¥37million**  
(YoY +242%)

Units **1,600**



■ New product *Ayame*, aimed at two-person households. ■ No.1 seller *Houkasen*

# (3) DMK: Reform of Earnings Structures

## Undergoing Catalogue Renewal



Time taken to produce printed catalogue reduced to

**1/3**



Accelerated PDCA



Early discovery of successful patterns

**SALES UP**

# FY3/2018 Strategy & Action

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# Action to Create Synergy

Home Delivery Business	Synergy	Effect	Progress
<b>Marketing</b>	<ul style="list-style-type: none"> <li>Wider customer base &amp; enhanced customer acquisition</li> <li>Greater customer spend (baskets) with cross-selling of product</li> <li>Streamlined promotion through knowledge sharing</li> </ul>	<ul style="list-style-type: none"> <li>Improved Oisix ARPU</li> <li>Sales of DMK merchandise on Oisix's website</li> <li>Improved DMK subscriber acquisition</li> </ul>	<ul style="list-style-type: none"> <li>Completion of non-food merchandise menu this FY for full-fledged roll out next FY</li> <li>Launched April 2017, 2.7x sales since start</li> <li>Marginal profits improvement</li> </ul>
<b>Procurement &amp; Production</b>	<ul style="list-style-type: none"> <li>Expansion of supplier networks</li> <li>Internalization of production</li> </ul>	<ul style="list-style-type: none"> <li>Stabilization of supply</li> <li>Mitigation of growth bottlenecks.</li> <li>Improved costs from merging of manufacturing facilities &amp; increase in scale.</li> </ul>	<ul style="list-style-type: none"> <li>Realization in FY2017</li> <li>Ongoing process in facilities includes optimisation of logistics process</li> </ul>
<b>Distribution</b>	<ul style="list-style-type: none"> <li>Collaborative distribution using proprietary delivery trucks &amp; Yamato Transport</li> <li>Distribution diversification – e.g. non-face to face delivery</li> </ul>	<ul style="list-style-type: none"> <li>Increased convenience factor for customers to benefit subscriber numbers &amp; FoP*</li> </ul>	<ul style="list-style-type: none"> <li>Carrying out trials in FY17 to grasp customer needs &amp; optimize collaborative delivery routes for full-fledged roll out in FY2018.</li> </ul>
<b>Other Operations</b>	<ul style="list-style-type: none"> <li>Volume discounts with centralization of accounts</li> </ul>	<ul style="list-style-type: none"> <li>Reduced packaging material costs</li> <li>Reduced settlement &amp; other fees</li> </ul>	<ul style="list-style-type: none"> <li>FY2017 incremental results:               <ul style="list-style-type: none"> <li>- Material costs (¥20m)</li> <li>- Settlement related (¥30m)</li> <li>- Back office (¥10m)</li> </ul> </li> </ul>

\*FoP: Frequency of purchase

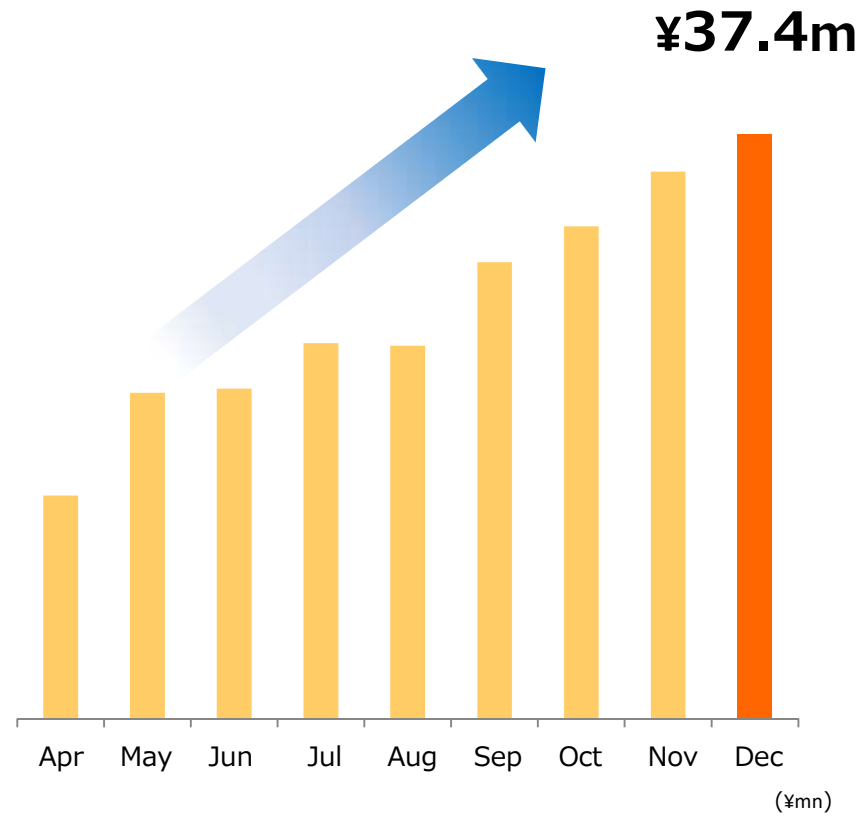
# Action to Create Synergy: Special DMK Site at Oisix.com

Introduction of recommended recipes & meal photographs to stimulate demand. Seeing healthy sales growth.

## ■ Designated DMK area on Oisix.com



## ■ Sales Trend Since Launch





# FY3/2018 Strategy & Action

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# (1) Real Retail (Physical Stores, Wholesale) : Shop in Shop

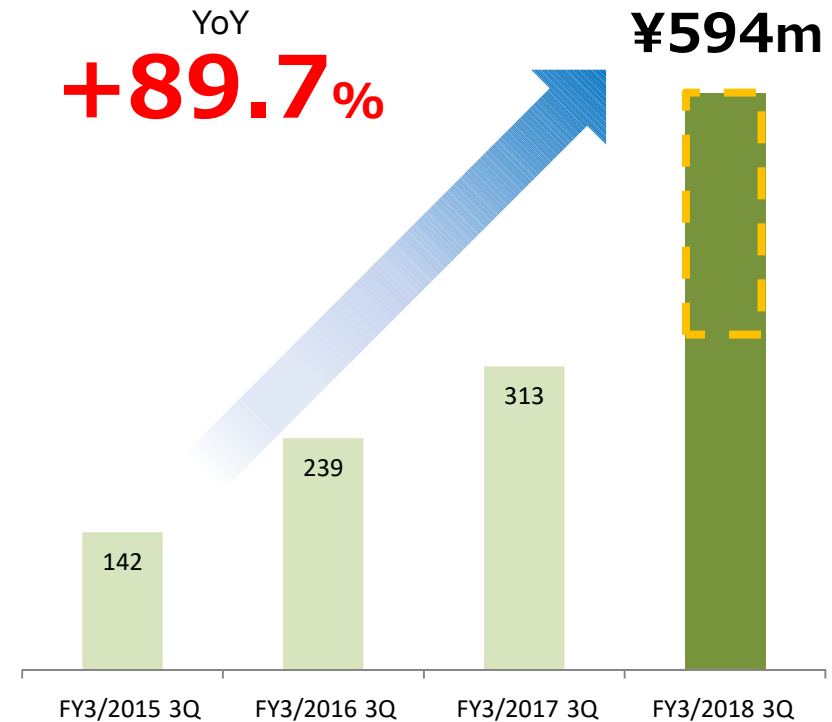
Boosted by the addition of DMK, sales were +89.7%YoY. Sales also benefited from exhibition events and the acquisition of new shop venues including the Miuraya & Inageya stores.

■ FY3/18 Activity example



Oisix corner: Inageya Hachioji Store

■ Sales trend (¥mn)



■ DMK wholesale business

# (1) Real Retail (Physical Stores, Wholesale) : Shop in Station

Oisix's new shop in-station format (Ecute Omiya): Altered layout maximizes Kit visibility and via POP, impart a sense of straight from the cooker pop & sizzle.

■ Shop layout changed from this...



...to this!



Weekly Kit sales have **doubled** since the change of layout!



## (2) Overseas Business

In September 2017, Oisix China was incorporated and established.  
Restricted services launched in Nov. Full-fledged roll out planned for FY2018.

### 1<sup>st</sup>: Limited Monitoring Sales to Japanese Expats

The screenshot shows the Oisix website interface for Japanese expats. The main banner features the Oisix logo and the text "モニター販売キャンペーン" (Monitoring Sales Campaign). Below this, it states "40セット限定販売" (Limited to 40 sets) and "12月21日(木) AM10:00迄" (Until 10:00 AM on December 21st, Thursday). A message in Japanese says: "多くの反響を頂いている、Oisix上海のモニター販売、この機会にぜひお求めください。" (We have received many responses, please take this opportunity to purchase Oisix Shanghai's monitoring sales.) It also includes a note: "※数日で売り切れてしまうため、お早めにご購入ください。" (Due to limited stock, please purchase early.) The product images include "黄金ジャガイモ" (Golden Potatoes), "自然な甘みと香りの人参" (Natural sweetness and aroma of carrots), and "甘みしっとり" (Sweet and moist).

### 2<sup>nd</sup>: Launch of Services to Chinese Locals (2018)

The screenshot shows the Oisix website interface for Chinese locals. The main banner features the Oisix logo and the text "再度限量登場 清甜爽口!" (Re-launching limited quantity, fresh and sweet!). Below this, it states "雪凍食! 宮崎金貨粟米" (Snow frozen food! Miyazaki Gold Medal Rice). A message in Chinese says: "粒粒服ト 粟米!" (Grain by grain, rice!). It also includes a note: "入貨機會來了! 上星期金貨粟米於山山內售罄, 很多顧客表示『想再買都無機會!』" (Inventory opportunity is here! Last week's gold medal rice was sold out in the mountains, many customers said 'I don't have a chance to buy again!'). The product images include "宮崎金貨粟米" (Miyazaki Gold Medal Rice), "夏日水果對決" (Summer Fruit Showdown), "父親節體面禮物" (Father's Day Dignified Gift), and "Oisix自信蔬菜" (Oisix Confidence Vegetables).

Email solicitation made to Japanese expats - 50 sets sold out in 2 days!

### (3) Novelty Business

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Carrying on from the summer, taking autumn orders for 'Kin Mugi 75% Sugar-off'. Campaigns to be repeated in 2018 summer & autumn. Foreseeable expansion could include Premium Malts, ALL-Free and other Suntory products.



Ran the first 'Kin Mugi 75% Sugar-off' autumn campaign

# FY3/2018 Strategy & Action

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# Tokushimaru: Expansion of Mobile Sales Infrastructure for “Shopping Refugees”

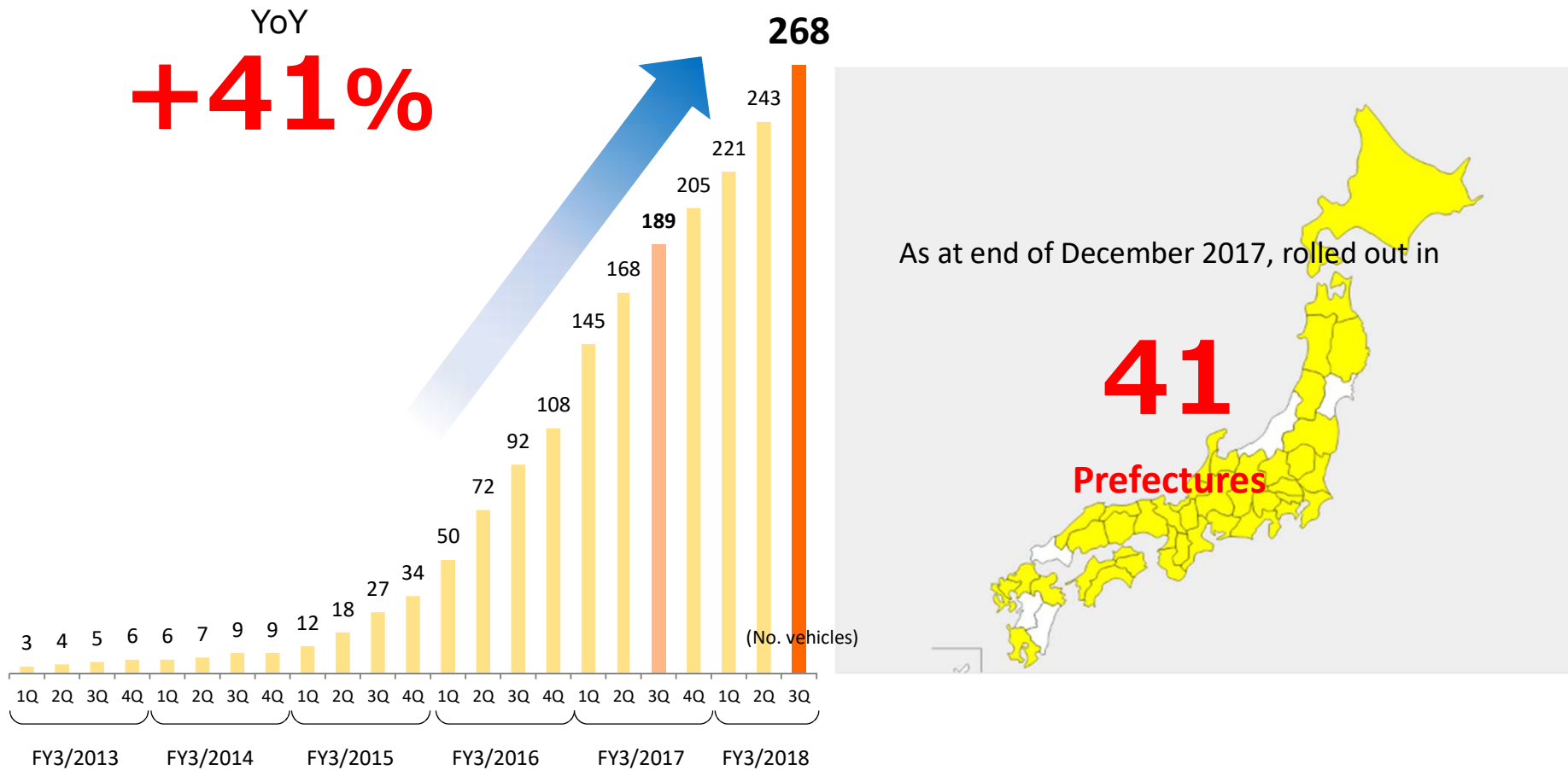
Alliances are underway with 12 supermarket operators including major operators Inageya & Comodi Iida. Together, they manage a total of 218 stores, mostly in the Kanto region.





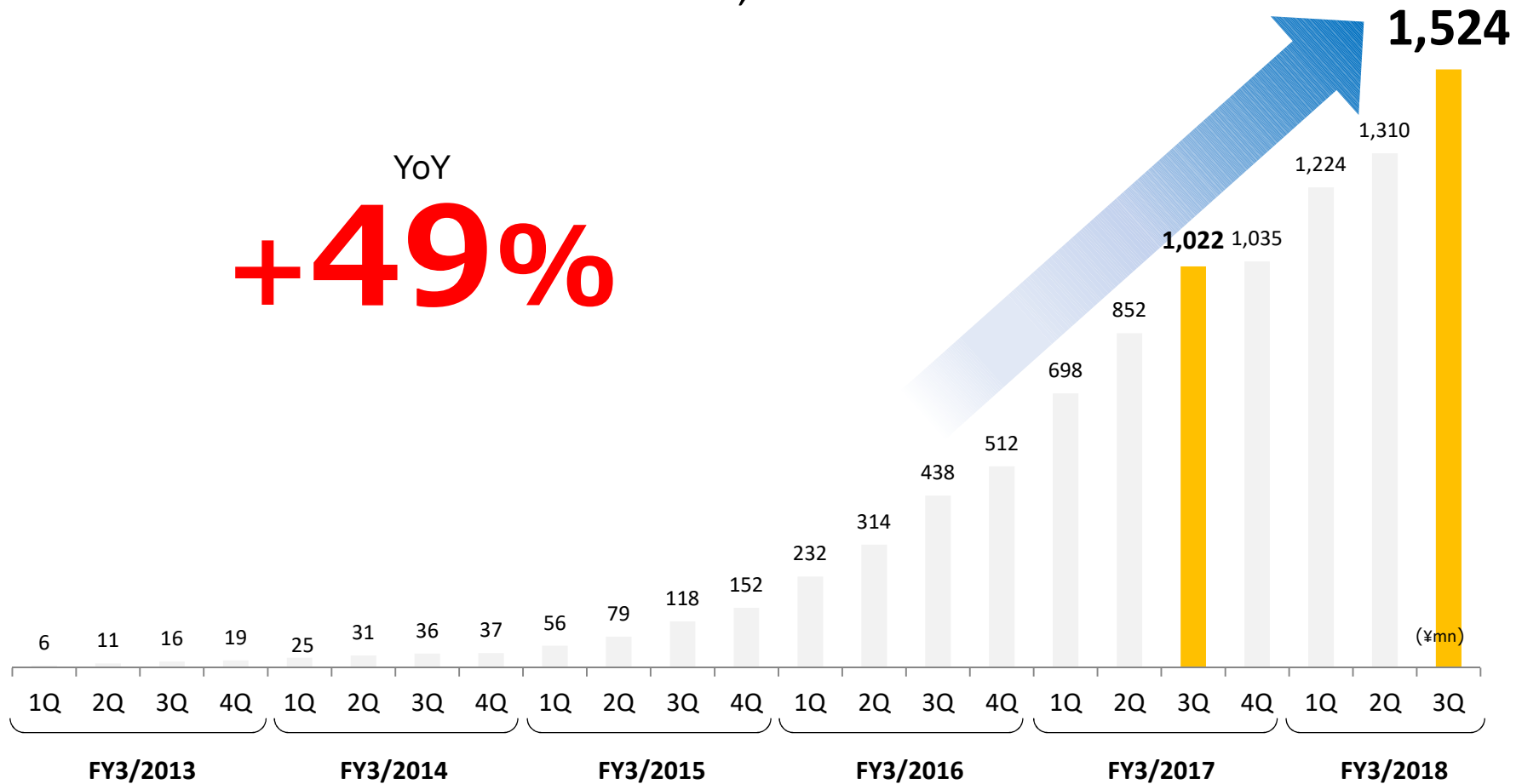
# Tokushimaru: Number of Vehicles in Operation

Positive effects of becoming a subsidiary – e.g., management support and stronger staffing - translated into +79 vehicles or **+41%** YoY growth.



# Tokushimaru : Total Transaction Value

A steady rise in the number of vehicles in operation saw FY3/18 3Q total transaction value\* increase to **Y1.52bn, +49%** YoY.



\*Total transaction value = Value of goods sold (Oisix.daichi revenue = royalties from each vehicle)

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- 2. Business Combination of Radishbo-ya Co., Ltd.**

# TOPICS

**1. Business and Capital Alliance with NTT DOCOMO**

2. Business Combination of Radishbo-ya Co., Ltd.

# 1. Business Alliance with NTT DOCOMO

## Food Home Delivery Market Strength

- The meal kit market, which is looking buoyant in the USA, is gaining traction in Japan (approx. Y200bn, source:Nikkei Trendy)
- Growth in home delivery market from further developments in women entering the work force (approx. Y2trn, source: Yano Research Institute)
- Possibility of further market expansion from the entry of traditional industry players and/or large capital-rich overseas players.

## DOCOMO assets

- Database of approx. 75 million customers
- Overwhelming brand power
- ABC Cooking Studio
- dPOINT Collaboration
- AI Agents to attract customers



## Oisix.daichi assets

- Network of excellent producers.
- Safe & secure brand
- Own food home delivery business infrastructure
  - 3 temperature zone warehousing
  - Production facilities
- No.1 in Meal Kits
- Network with home delivery major Yamato Transport

# 1. Capital Alliance with NTT DOCOMO

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Capital alliance with DOCOMO through 3<sup>rd</sup>-party allocation.

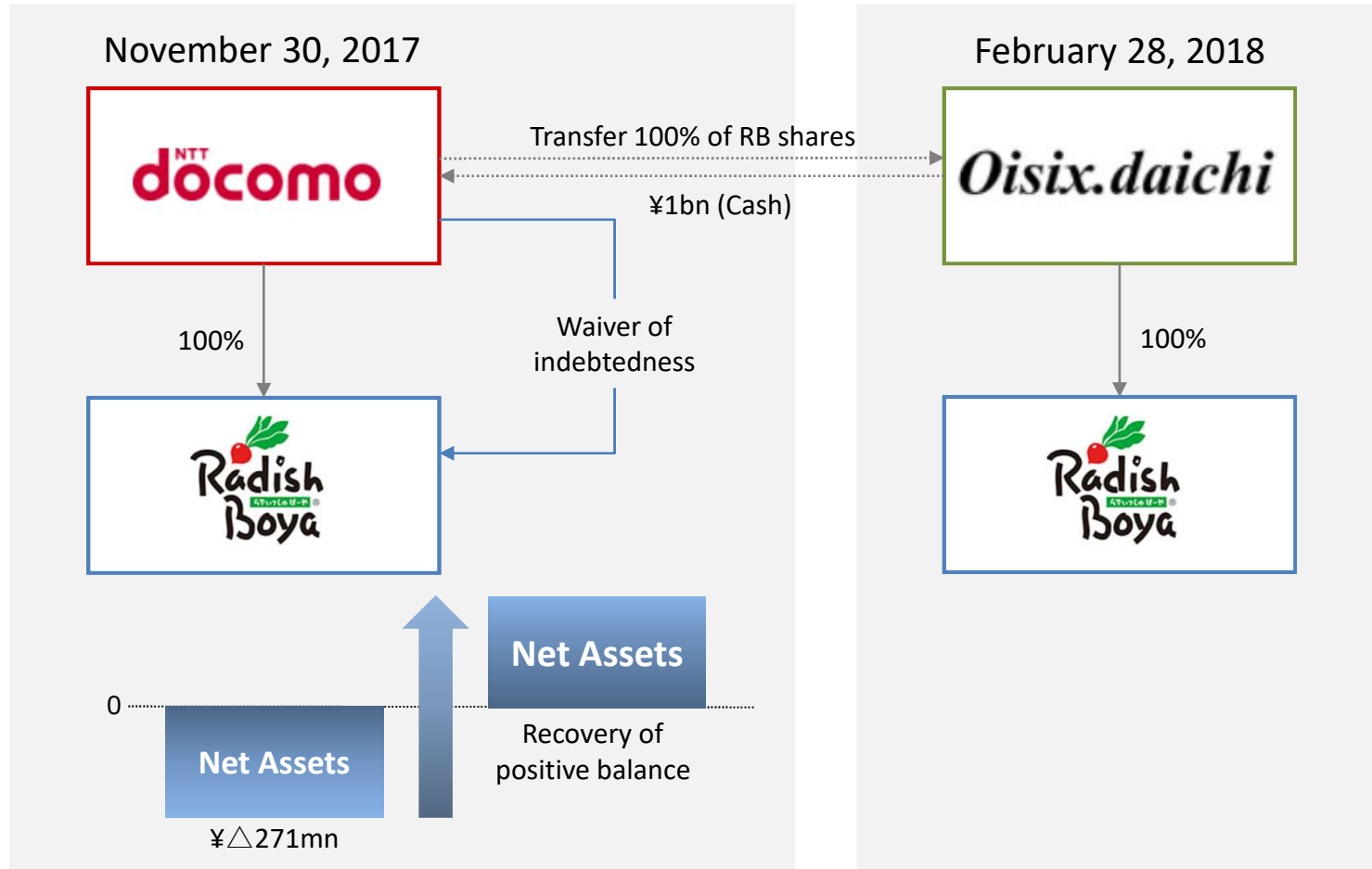


# TOPICS

1. Business and Capital Alliance with NTT DOCOMO
- 2. Business Combination of Radishbo-ya Co., Ltd.**

## 2. Business Combination of Radishbo-ya (RB)

DOCOMO transfers its 100% holding in RB to Oisix.daichi on February 28, 2018.



## 2. About Radishbo-ya

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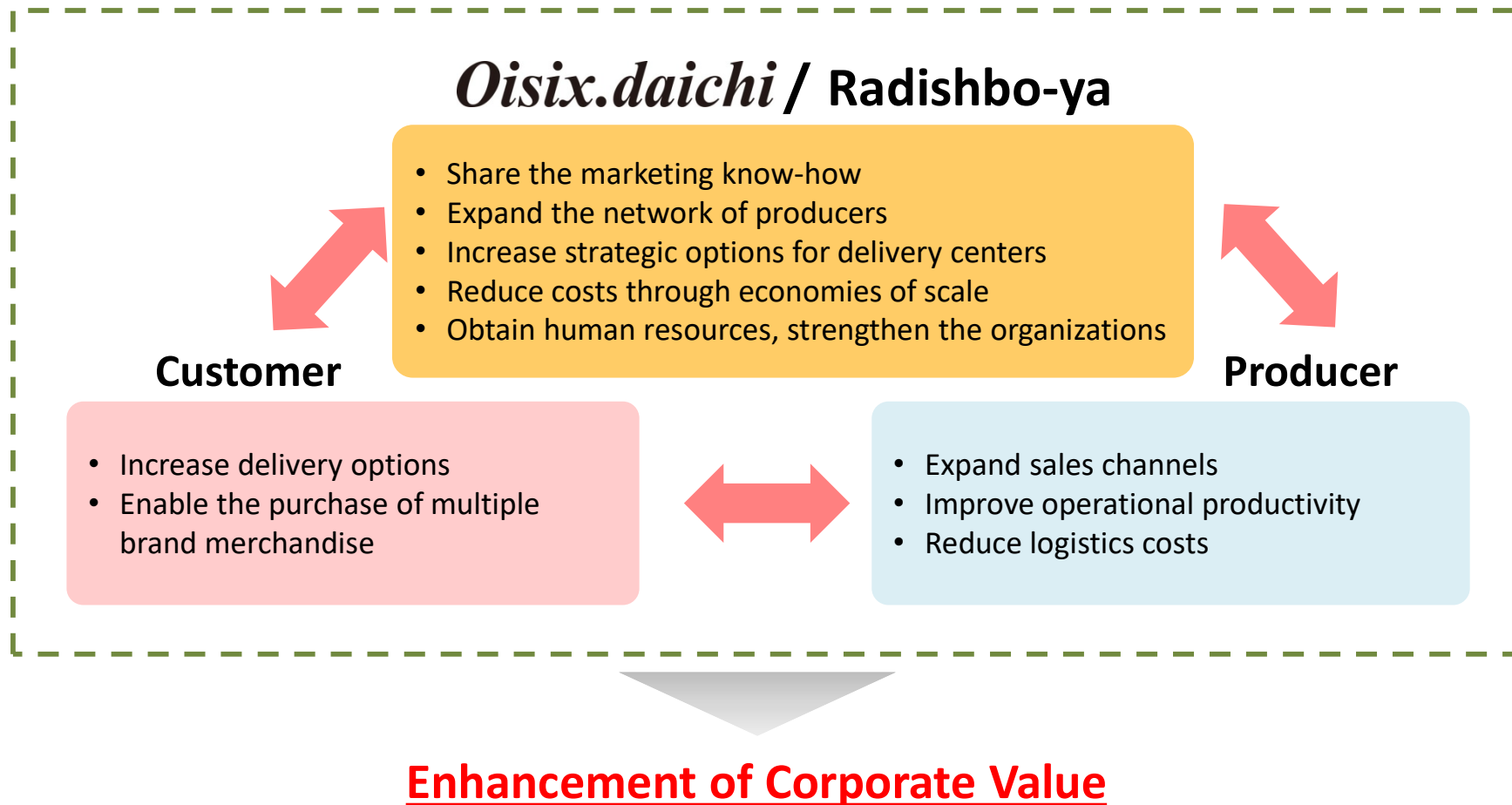
<b>Company name</b>	<b>Radishbo-ya Co., Ltd.</b>
Representative Director	Toshinari Kunieda (Representative Director & CEO)
Year of establishment	May 17, 1988
Major shareholders	NTT DOCOMO, Inc. 100%
Business Description	Delivery service of organic, low-chemical & non-additive foods.
Places of business	Headquarter (Tokyo), Hokkaido Center, Tohoku Center, Tokyo Area Center, Kanagawa Center, Chubu Center, Osaka Center
No. employees	Full time (including contractors) 240, part-time/temporary 162 ✕as at end March, 2017
No. farmers, etc.	Approx. 2,400



## 2. Aim of Business Combination of Radishbo-ya

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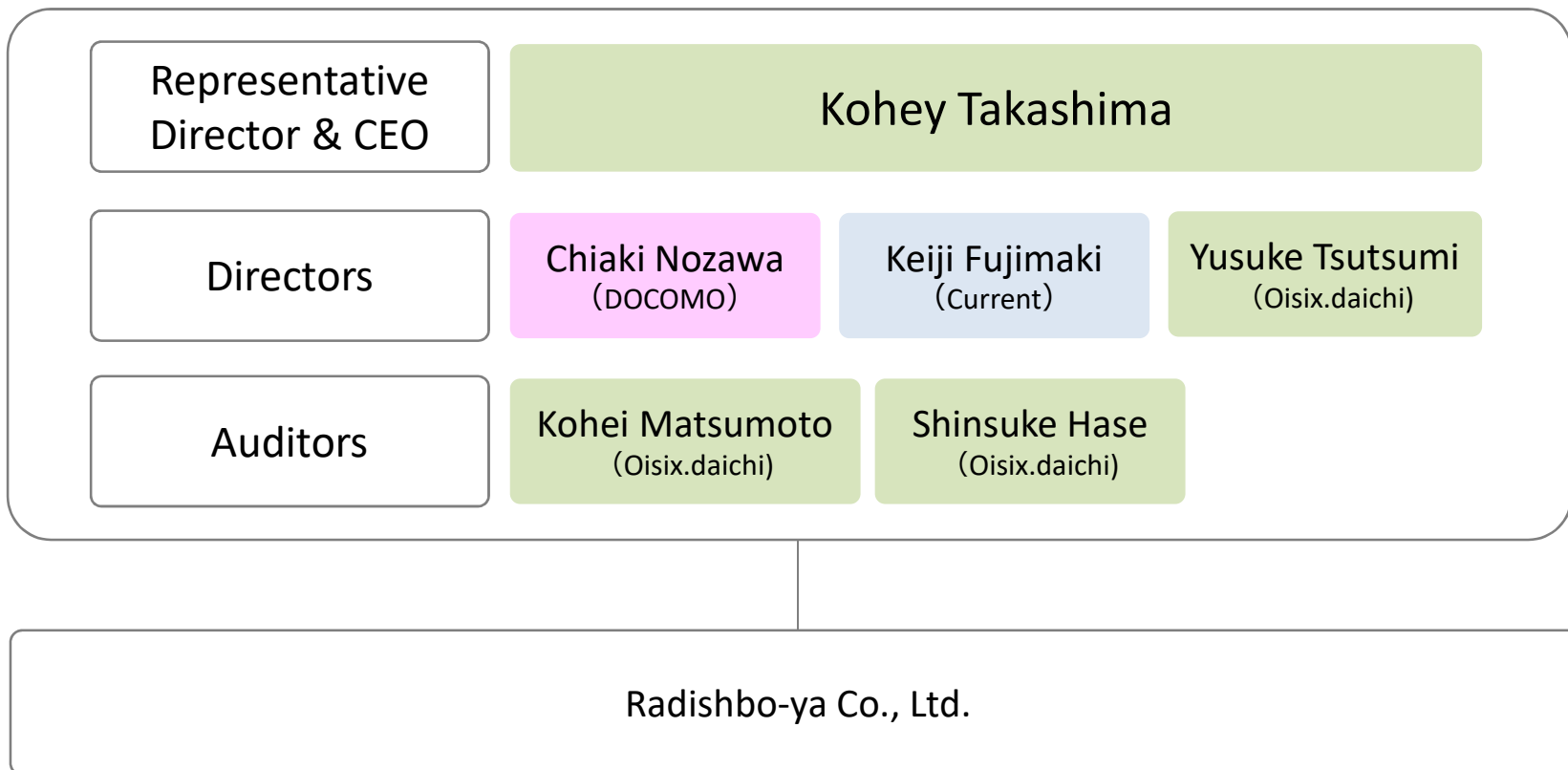
Aim to utilise and make efficient both parties' platforms to optimise stakeholder value & increase corporate value.



## 2. Radishbo-ya New Management Structure

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Kohey Takashima (Oisix.daichi CEO) to be appointed Representative Director and CEO at an extraordinary general shareholders' meeting on February 28, 2018.



## 2. Schedule of Business Combination of Radishbo-ya

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January 30, 2018	<ul style="list-style-type: none"><li>● Announcement of Business Combination</li></ul>
February 28, 2018	<ul style="list-style-type: none"><li>● 100% Share transfer from DOCOMO</li><li>● Radishbo-ya moves to new management structure</li></ul>
March 1, 2018~	<ul style="list-style-type: none"><li>● Consolidate Radishbo-ya's business results (FY3/2019)</li></ul>

# Contents

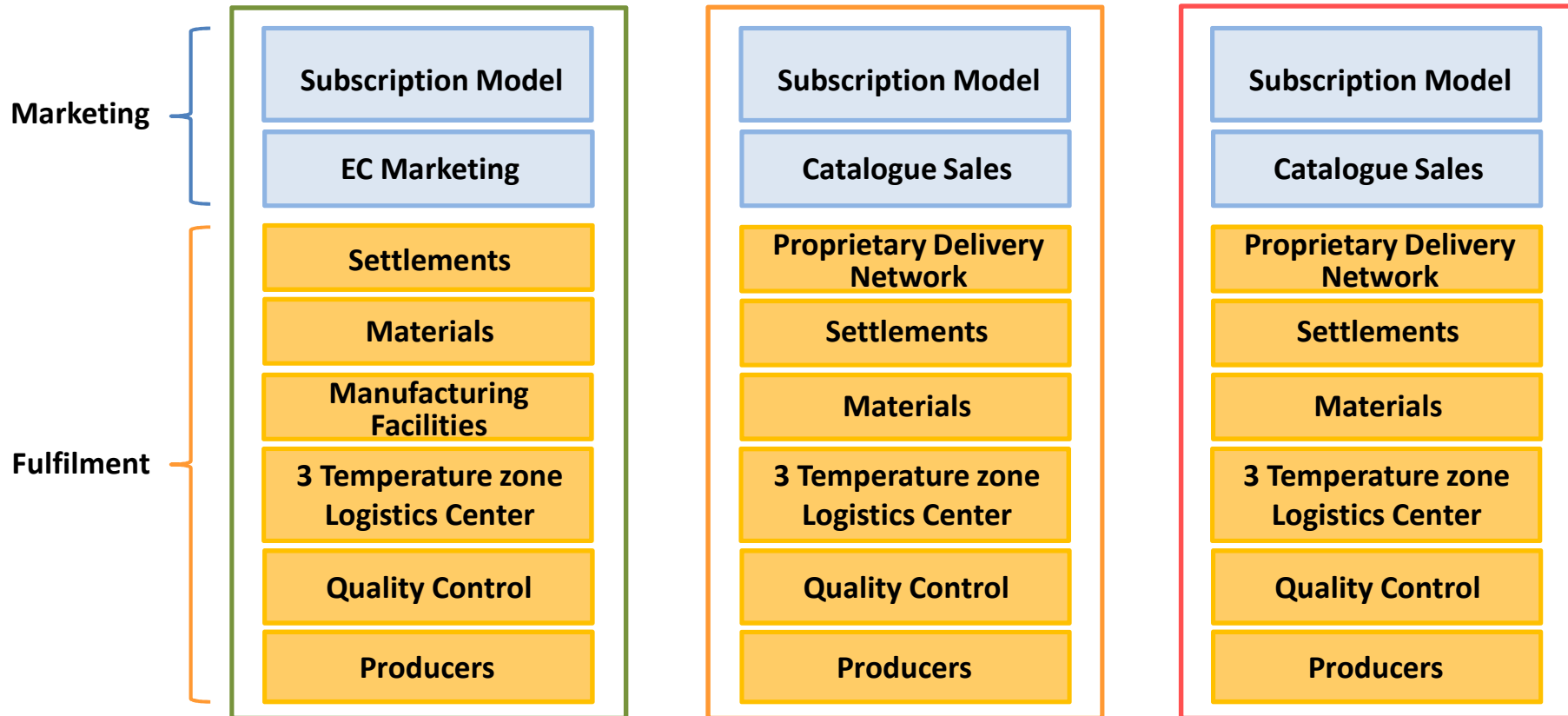


# Basic Policy for Future Growth Strategies

## **Food Delivery Business: Building the Platform for Growth**

# Conventional operations among each home delivery brand

Previously, each functions as its own home delivery brand and operates independently.



# Food Delivery Business: Building the Platform for Growth

Going forward, creation of individual platforms with unique/common functions allowing for knowhow & infrastructure sharing. Promotes rationalization/social problem-solving.



**Marketing Platform**

- Subscription
- CRM
- UI/UX
- Web promotion, etc.

**Fulfilment Platform**

- Producers
- 3 temperature logistics centers
- Food processing/manufacturing facilities
- Delivery network/facilities
- Quality control, etc.



# Benefits of Platform Approach

## Marketing Platform

### Subscription /Promotion

- Development of subscription model to create a solid customer base & stable income streams
- Repeat marketing using access logs, purchase analysis & improved UI/UX, etc.
- Improved customer acquisition rates through use/promotion of web marketing
- Optimisation of customer acquisition methods using catalogues

## Fulfilment Platform

### Procurement /Production

- Stabilised supply through expanded supplier network
- Increased productivity through sharing operational knowhow of 3 temperature-zone food centers
- Merged processing & production facilities for increased productivity, lower costs & improved quality

### Quality Control

- Unified product selection & quality checking functions to resolve differences in brand quality & reduce costs

### Materials

- Unification of packaging materials to reduce costs & improve quality

### Logistics

- Building of an effective delivery network using Yamato Transport, our own trucks & regional facilities
- Increased convenience for customers through delivery method diversification

### Settlement

- Unification of vendors for volume discounts

# Farm for Tomorrow, Table for Tomorrow

We provide services that enable a better food life for more people.

We realize a society where good farmers are rewarded and proud.

We evolve continuously to deliver a sustainable framework that links farm and table.

We solve social issues related to food through business approaches.

We create and expand Tomorrow's Food.

*Oisix.daichi*