

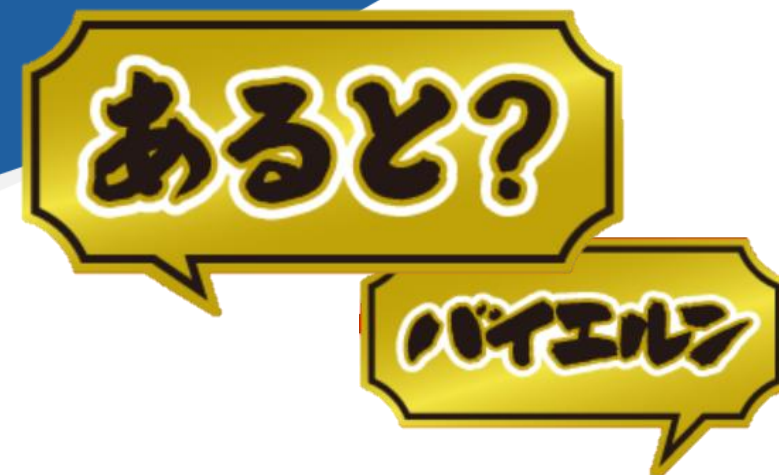
ITOHAM YONEKYU HOLDINGS INC.

(TSE Prime : 2296)

FY2025 Full-Year Financial Results

(Apr 1, 2025 – Mar 31, 2026)

May 01, 2026



Earnings Summary

Full-year results for FY2025

Consolidated

- ✓ Revenue and profit growth (Revenue: JPY1,071.4B (+8.4%) Ordinary Profit: 30.4B (+46.5%))
- ✓ Mid-Term Plan Targets Achieved One Year Early (Ordinary Profit 30.4B | ROE 7.0% | ROIC 6.2%)
Mid-Term Plan Targets: Ordinary Profit ¥30.0bn | ROE 6.2% | ROIC 5.9%

Business Segment

- ✓ **[Processed Food Div.] - Decline in revenue and profit**
Profit declined as higher raw material and logistics costs were not fully offset by price increases and product renewal amid weak demand and lower volumes.
- ✓ **[Meat Div.] - Revenue and profit growth**
Profit increased in both domestic and overseas businesses, driven by improved profitability in domestic farming business and a recovery in earnings at ANZCO.

Full-year forecast for FY2026

Consolidated

- ✓ Forecast Decline in Revenue and Profit (Revenue: JPY 1,040.0B (−2.9%), Ordinary Profit: 28.0B (−7.9%))

Business Segment

- ✓ **[Processed Food Div.] - Revenue and profit growth**
Raw material and logistics costs are expected to continue rising; however, we will improve unit prices, streamline product specifications, and accelerate product renewal.
- ✓ **[Meat Div.] - Decline in revenue and profit**
Profit decreased, reflecting a pullback from last year's strong imported chicken performance and the year-on-year impact of ANZCO's fiscal year change.

Shareholder Returns

- ✓ FY2026 Plan : 155 yen per share for FY2026. DOE 3.2%, Progressive dividend(JPY +10)

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Note:

The financial information disclosed by Japanese GAAP and FY2026 shows from Apr 1, 2026 to March 31, 2027.

This material is rounded off to second decimal places. Therefore, sums and differences of figures may not equal totals.

[Consolidated]

FY2025 Results

Revenue and profit growth

Sales : +8.4%
Ordinary Profit : +46.5%

FY2025 full year result

billion yen

	Amount	% of sales	Year-on-Year Change		Previous forecast Rev 5-Feb	Change
			Change	Change%		
Sales	1,071.4	-	+82.6	+8.4%	1,050.0	+21.4
Operating profit	28.5	2.7%	+8.9	+45.4%	27.5	+1.0
Ordinary profit	30.4	2.8%	+9.6	+46.5%	28.5	+1.9
Net income	20.2	1.9%	+7.1	+54.4%	18.5	+1.7

		Change%	Change
ROE (%)	7.0%	+2.4%	-
ROIC (%)	6.2%	+1.6%	-
EPS (yen)	356.4	-	+126
DPS (yen) *	320.0	-	+175
DOE (%) *	6.8%	+3.7%	-

*Includes a commemorative dividend of 175 yen

[Consolidated]

FY2025 Results

YoY Variance Factors

Processed Food : - 0.3B
Meat : + 10.3B

Change from Previous Forecast
Processed Food : - 0.6B
Meat : + 2.6B



[Processed Food Division]

FY2025 Results

Decline in revenue and profit

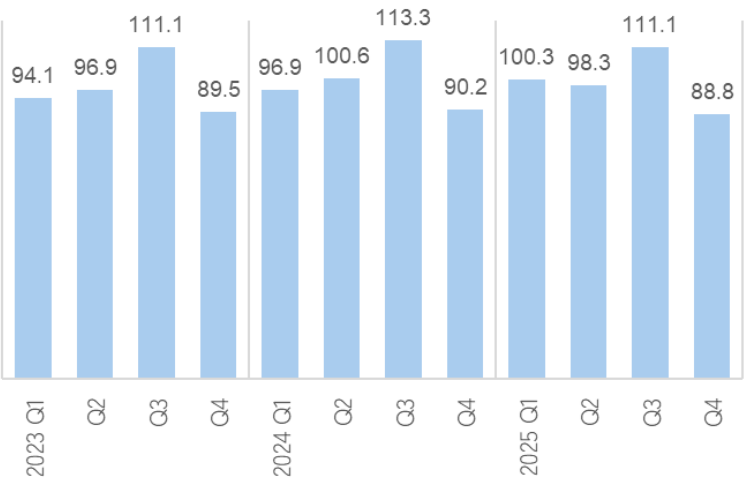
Sales : - 2.3B (- 0.6%)
Ordinary Profit : - 0.3B (- 3.1%)

Segment Info FY2025 full year results

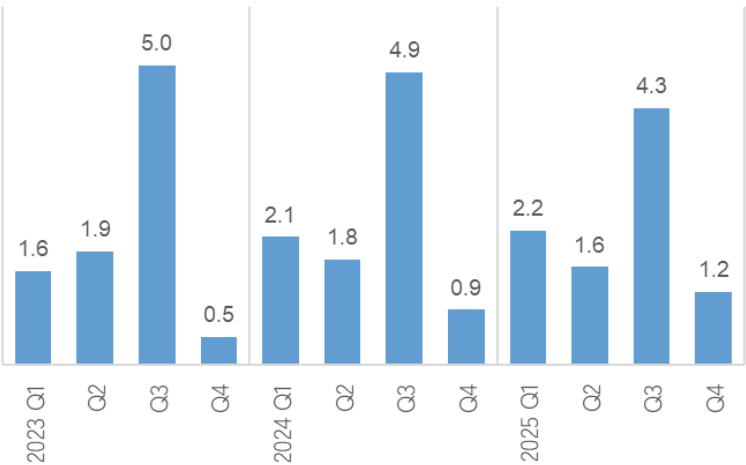
billion yen

		Amount	% of sales	Year-on-Year Change		Previous forecast Rev 5-Feb	Change
Processed Food Division	Sales	398.6	-	-2.3	-0.6%	404.0	-5.4
	Operating profit	8.9	2.2%	-0.2	-2.6%	9.6	-0.7
	Ordinary profit	9.4	2.4%	-0.3	-3.1%	10.0	-0.6

Sales



Ordinary profit



[Processed Food Division]

FY2025 Variance Analysis

(Ordinary Profit: YoY - 0.3B)
Despite efforts to accelerate product renewal and reduce costs, profit declined due to weak consumer demand and higher raw material and logistics unit costs.

Ordinary profit factors

	billion yen			Year change from prev.
	Q3(YTD) results	Q4 results	Year results	
FY2024 Ordinary profit	8.8	0.9	9.7	
Sales Volume	-2.2	-0.4	-2.6	-0.7
Gross Margin,SG&A	+6.1	+1.0	+7.0	+0.2
Ingredient,utility Costs	-3.1	+0.4	-2.8	+0.2
Logistics cost impact	-1.3	-0.6	-1.9	-0.2
Non-operating income and expenses	-0.1	-0.0	-0.1	-0.1
Others	+0.0	-0.0	-0.0	-0.1
FY2025 Ordinary profit	8.2	1.2	9.4	-0.6

Main Factors

- [Quantity]**

 - Sales volume declined due to weak consumer demand. (Sales volume YoY)
 - Ham & sausage : -1.9% (Q4 : -1.1%)
 - Processed food : -4.0% (Q4 : -3.8%)
 - Sales volume of winter gift items declined -6.1% YoY (by weight).
- [Unit price]**

 - Price revisions and internal improvements enhanced profitability.
 - Ham & sausage : +3.8B
 - Processed food : +2.6B
- [Raw materials and utility costs]** (YoY)

 - Raw materials : -3.1B (Change from prev. : +0.1B)
 - Subsidiary materials : -0.0B (Change from prev. : +0.2B)
 - Utility costs, etc. : +0.3B (Change from prev. : ±0.0B)
- [Logistics unit price]**

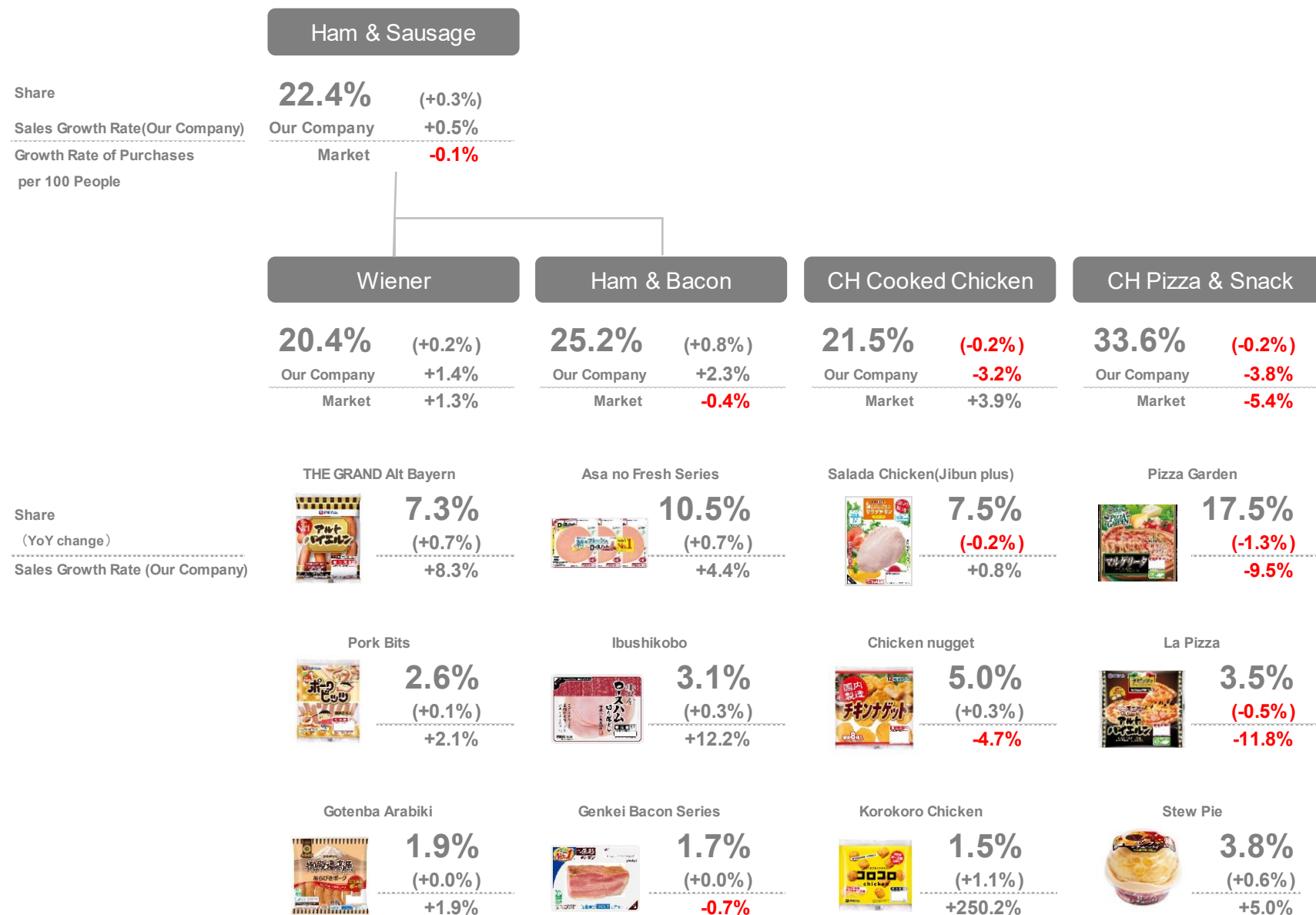
 - Charter freight rates rose.

01 Earnings Results (FY2025 Results)

[Processed Food Division]

Growth rates by category and product for key household items

- Our market share
- Our sales growth rate
- Market purchase value growth rate

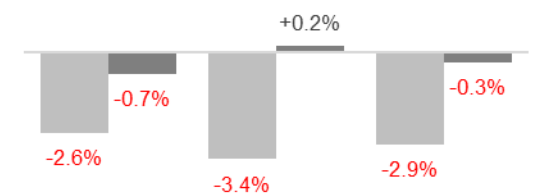


[Processed Food Division]

- **B2C / B2B (volume / amount)**
- **External environment data**

Total

B2C		B2B		Total	
WT	¥	WT	¥	WT	¥



Company	Percentage Change
Company 1	-1.9%
Company 2	-4.9%
Company 3	-2.1%

Category	Percentage Change
Decrease	-4.0%
Increase	+0.4%
Increase	+0.6%
Increase	+1.3%
Decrease	-5.6%
Increase	+0.2%
Decrease	-1.5%
Increase	+0.8%
Increase	+0.8%

[Meat Division]

FY2025 Results

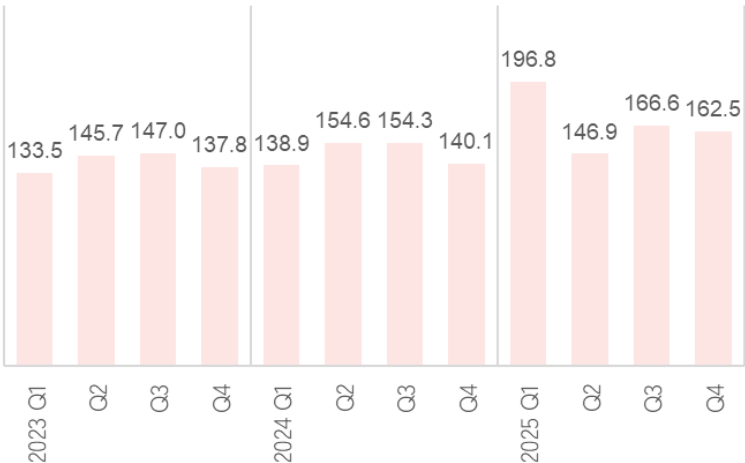
Revenue and profit growth

- Sales : +84.9B (+14.4%)
- Ordinary Profit : +10.3B (+84.3%)

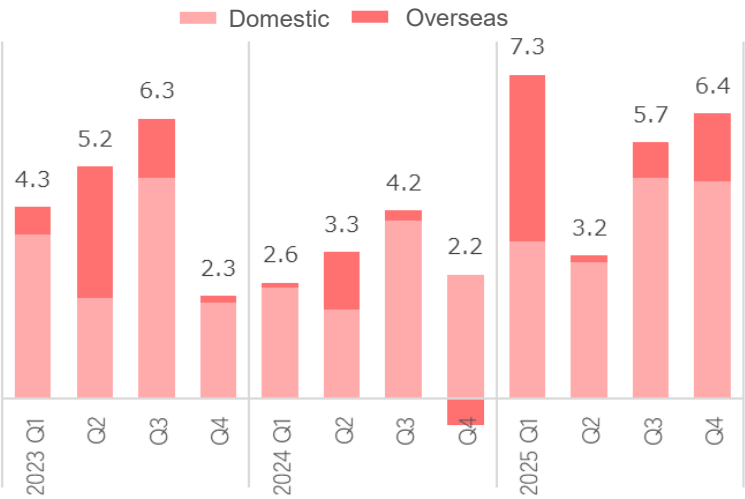
Segment Info FY2025 full year results billion yen

		Amount	% of sales	Year-on-Year Change		Previous forecast Rev 5-Feb	Change
				Change	Change%		
Meat Division	Sales	672.8	-	+84.9	+14.4%	646.0	+26.8
	Operating profit	21.4	3.2%	+9.2	+75.9%	19.4	+2.0
	Ordinary profit	22.6	3.4%	+10.3	+84.3%	20.0	+2.6

Sales



Ordinary profit



[Meat Division]

FY2025 Variance Analysis

(Ordinary Profit YoY : +10.3B)
Profit increased in both domestic and overseas businesses, driven by improved profitability in the Domestic farming business and an earnings recovery at ANZCO.

Ordinary profit factors

	billion yen			Year change from prev.
	Q3(YTD) results	Q4 results	Year results	
FY2024 Ordinary profit	10.1	2.2	12.3	
Sales Volume	+0.1	+0.1	+0.1	+0.1
Gross Margin,SG&A	+1.0	+1.6	+2.5	+1.6
Market and feed price (Farm cost)	+2.2	+0.5	+2.6	-
Logistics cost impact	-0.4	-	-0.4	+0.2
Overseas Operation	+3.1	+2.2	+5.2	+0.6
Non-operating income and expenses	+0.4	-	+0.4	+0.2
Others	-0.0	-	-	+0.1
FY2025 Ordinary profit	16.2	6.4	22.6	+2.6

Main Factors
[Unit Price] <ul style="list-style-type: none">- Domestic pork: Improved profitability through enhanced risk management.- Imported chicken: Higher local prices and tighter domestic supply-demand conditions drove earnings growth.
[Domestic farming business] <ul style="list-style-type: none">- Contribution from Steady Domestic Chicken Market Conditions. [Wholesale Price (Tokyo) YoY (Apr-Mar. Ave.)] Thigh JPY +116/kg, Breast +151/kg
[Logistics unit price] <ul style="list-style-type: none">- Charter freight and storage costs increased in the domestic business.
[Overseas business] (ANZCO) <ul style="list-style-type: none">- Business Conditions Remain Favorable Earnings improved, supported by higher beef export prices to North America and continued strong sales of lamb to Europe and North America.- Fiscal year change resulted in a 15-month reporting period (Jan 2025–Mar 2026). Ordinary Profit impact: JPY1.1B (Jan–Mar 2025)

[Meat Division]

Sales Performance

- Growth rate by livestock category (volume and value)
- External environment data

Domestic/Imported Growth rate

		Results(excl. ANZCO)		MIC Survey(Apr.-Feb.)	
		Volume	Amount	Purchase QTY	Expenditure
Beef	Domestic	-2.0	+2.7	-1.5	+0.7
	Imported	-1.2	+0.1		
Pork	Domestic	-2.2	+0.0	+3.7	+6.1
	Imported	+3.5	+2.6		
Poultry	Domestic	+7.1	+24.8	+0.0	+7.3
	Imported	+2.0	+18.7		
Lamb & Others		+7.0	+19.9		

NZ Export Growth

Jan 25-Mar 26(15M)		
	NZ Export Results	
	Volume	Amount
Beef	-6.7	+13.8
Lamb	-2.2	+25.9

*Stats NZ

Beef Market Reference Data (External Environment)						
	Production YoY			Export YoY		
	FY2024	FY2025	FY2026 (Fcst.)	FY2024	FY2025	FY2026 (Fcst.)
U.S.	+0.0	-3.7	-0.8	-1.0	-14.3	-8.2
Brazil	+8.2	+6.4	-1.9	+25.6	+20.4	-2.4
Australia	+16.1	+11.7	-1.2	+21.7	+16.3	-2.2

* USDA

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[Consolidated]

FY2026 Full-Year Forecast

Decline in revenue and profit

Sales : -31.4B
Ordinary Profit : - 2.4B
Net Income : - 1.7B

FY2026 full year financial earnings forecast billion yen

	Amount	% of sales	Year-on-Year Change	Change%
Sales	1,040.0	-	-31.4	-2.9%
Operating profit	27.0	2.6%	-1.5	-5.1%
Ordinary profit	28.0	2.7%	-2.4	-7.9%
Net income	18.5	1.8%	-1.7	-8.5%

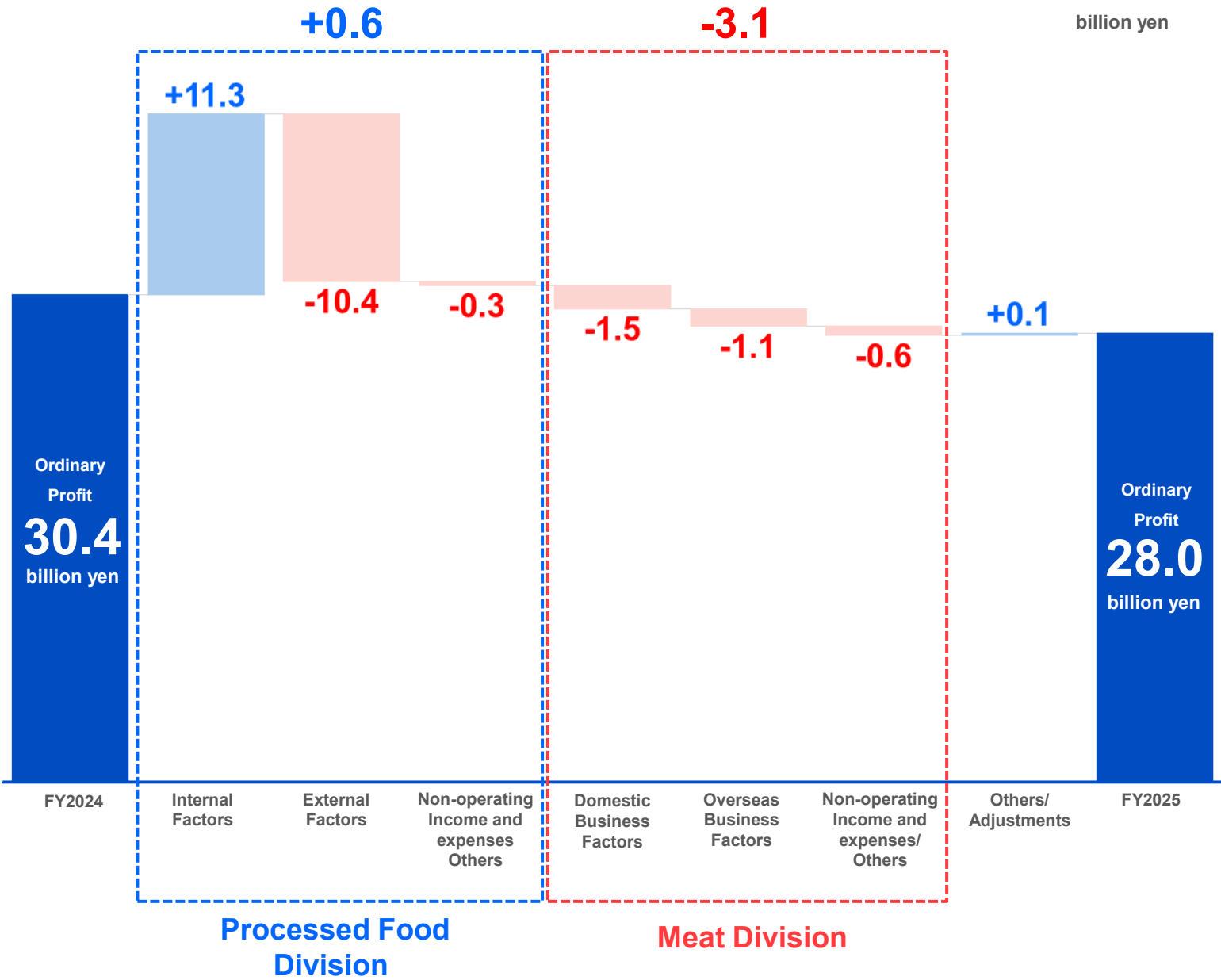
	Change%
ROE (%)	6.2% ▲0.8%
ROIC (%)	5.4% ▲0.8%

[Consolidated]

FY2026 Full-Year Forecast

YoY Variance Factors

Processed Food : +0.6B
Meat : - 3.1B



[Processed Food Division]

FY2026 Full-Year Forecast

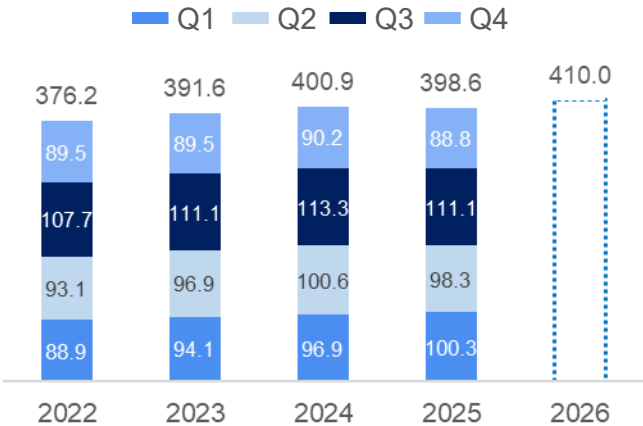
Forecast Revenue and Profit Growth

Sales : +11.4B (+ 2.9%)
Ordinary Profit : + 0.6B (+ 6.3%)

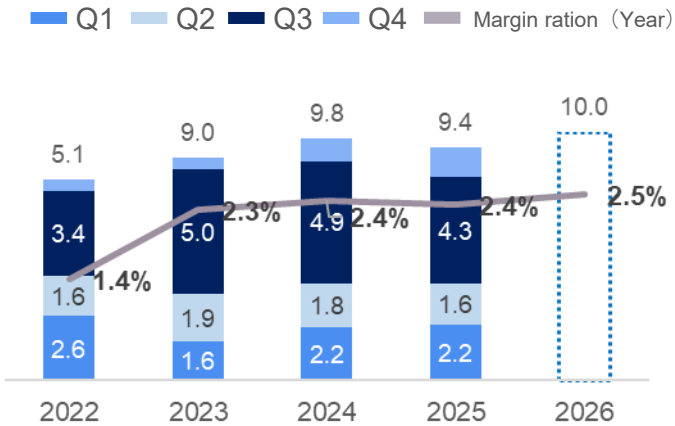
Segment Info FY2026 full year financial earnings forecast billion yen

		Amount	% of sales	Year-on-Year Change	Change%
Processed Food Division	Sales	410.0	-	+11.4	+2.9%
	Operating profit	9.7	2.4%	+0.8	+9.3%
	Ordinary profit	10.0	2.4%	+0.6	+6.3%

Sales



Ordinary Profit/margin ration



[Processed Food Division]

Full-Year Forecast for FY2026 – Variance Analysis

- Although raw material, utility, and logistics costs are expected to increase in FY2026, we aims to cover these increases through unit price improvements and product renewal initiatives.
- we have incorporated, to a reasonable extent, currently foreseeable cost impacts related to the situation in the Middle East.

Ordinary profit factors

	billion yen		
	H1	H2	Year
	Forecast	Forecast	Forecast
FY2025 Ordinary profit	3.9	5.5	9.4
Sales Volume	+0.3	-	+0.3
Gross Margin, SG&A	+3.9	+7.1	+11.0
Ingredient, utility Costs	-3.2	-5.8	-9.0
Logistics cost impact	-0.7	-0.8	-1.4
Non-operating income and expenses	-0.2	-0.1	-0.3
Others	+0.0	+0.0	+0.0
FY2026 Ordinary profit	4.0	6.0	10.0

Main Factors
[Quantity] - A rebound from last year’s volume decline, with a focus on restoring sales volumes.
[Unit price] - Plans include unit price improvements, consolidation of product specifications, and accelerated product renewal initiatives.
[Raw materials and utility costs] Raw materials - 4.9B Subsidiary materials - 3.5B Utility costs, etc. - 0.7B - Higher procurement costs driven by raw material price increases. - Costs for auxiliary materials and utilities increased amid the situation in the Middle East
[Logistics unit price] - Expected increase in charter freight costs.

[Meat Division]

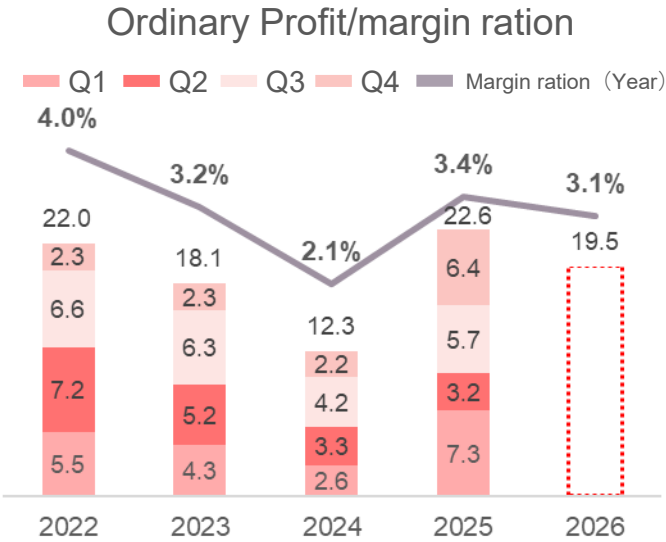
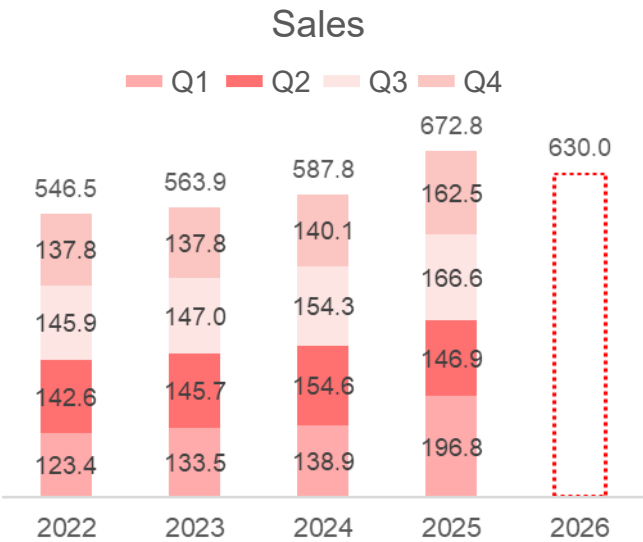
FY2026 Full-Year Forecast

Decline in revenue and profit

Sales : -42.8B(- 6.4%)
Ordinary profit : - 3.1B(-13.8%)

Segment Info FY2026 full year financial earnings forecast billion yen

		Amount	% of sales	Year-on-Year Change	Change%
Meat Division	Sales	630.0	-	-42.8	-6.4%
	Operating profit	18.5	2.9%	-2.9	-13.5%
	Ordinary profit	19.5	3.1%	-3.1	-13.8%



[Meat Division]

Full-Year Forecast for
FY2026 – Variance Analysis

Domestic business: -1.5B

Overseas business: -1.1B

Ordinary profit factors

	billion yen		
	H1	H2	Year
	Forecast	Forecast	Forecast
FY2025 Ordinary profit	10.5	12.1	22.6
Sales Volume	-	-0.2	-0.2
Gross Margin,SG&A	+1.2	-0.7	+0.5
Market and feed price (Farm cost)	-0.6	-0.3	-0.9
Logistics cost impact	-0.6	-0.3	-0.9
Overseas Operation	+0.3	-1.4	-1.1
Non-operating income and expenses	-0.3	-0.2	-0.4
Others	-0.0	-0.1	-0.2
FY2026 Ordinary profit	10.5	9.0	19.5

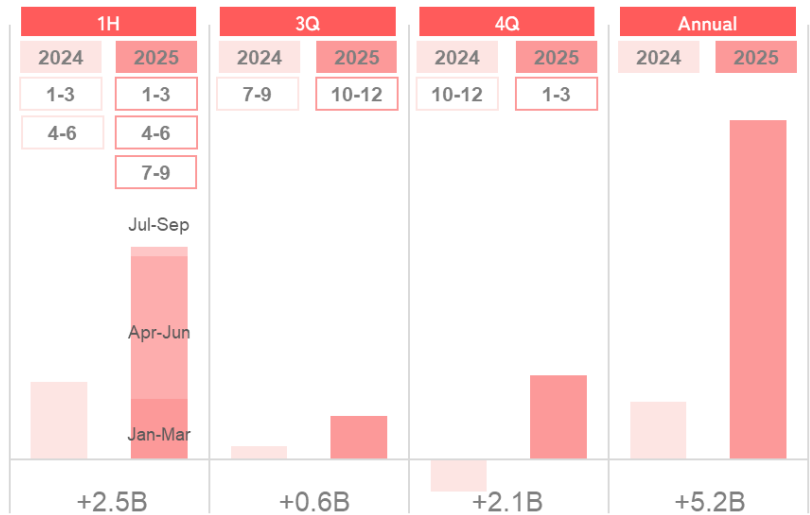
Main Factors

- [Quantity]**
- Continued strict position management.
- [Unit price]**
- (H2) YoY pullback in imported chicken.
- [Domestic farming business]**
- Chicken market prices are expected to stay elevated. However, a YoY pullback is anticipated, reflecting the rebound from last year's price increase.
 - Negative impact from higher feed prices.
- [Logistics unit price]**
- Year-round increase in charter freight costs.
- [Overseas business]**
(ANZCO)
- Sales of beef to North America and lamb to Europe and North America are expected to remain solid.
 - YoY impact from prior fiscal year-end change: JPY-1.1B (Prior fiscal year covered 15 months)

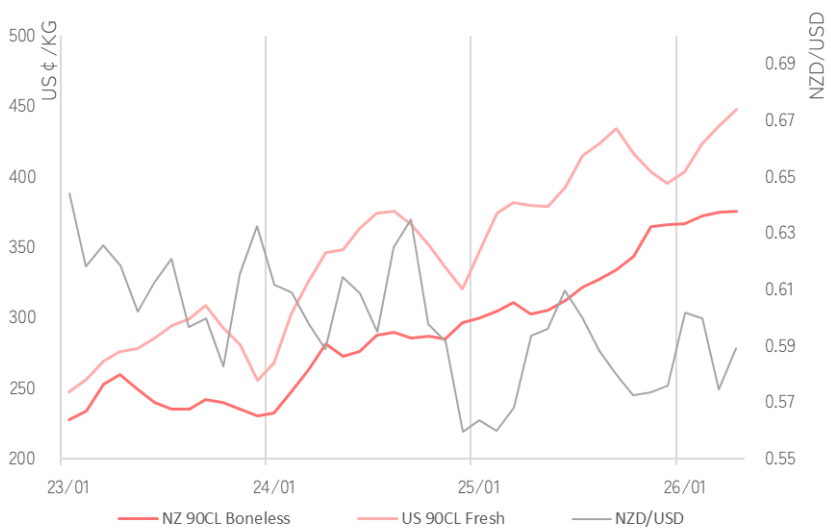
[Meat Division]

Market Trends (ANZCO)

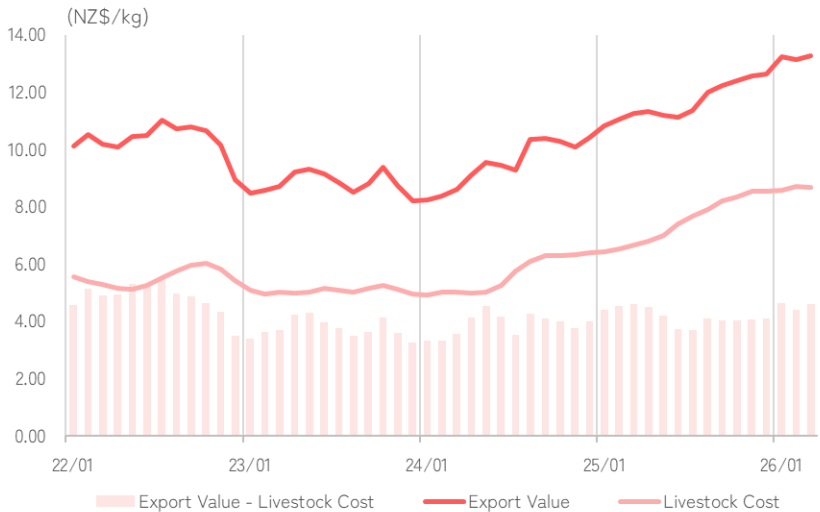
Comparison of the change in accounting period impact
(FY2024: Jan-Dec 2024 , FY2025: Jan-Dec 2025 + Jan-Mar 2026)



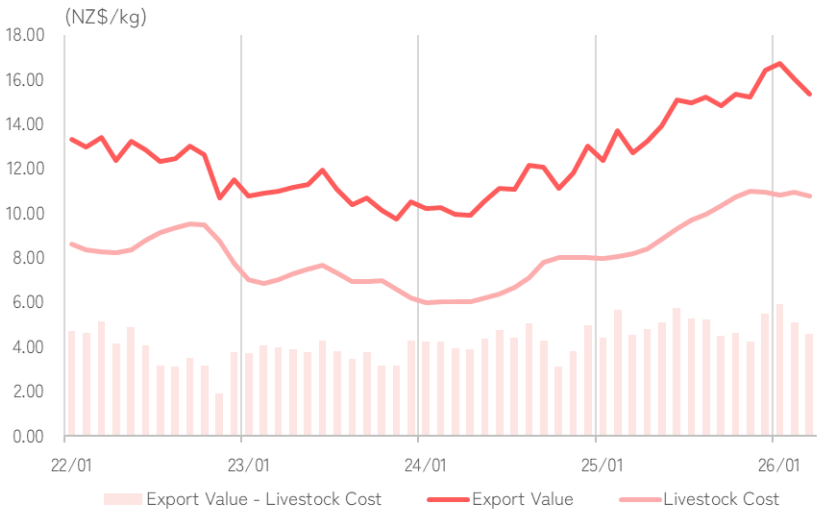
Transition of beef 90CL price : US and imported from NZ



Transition of beef FOB and procurement price in NZ



Transition of lamb FOB and procurement price in NZ

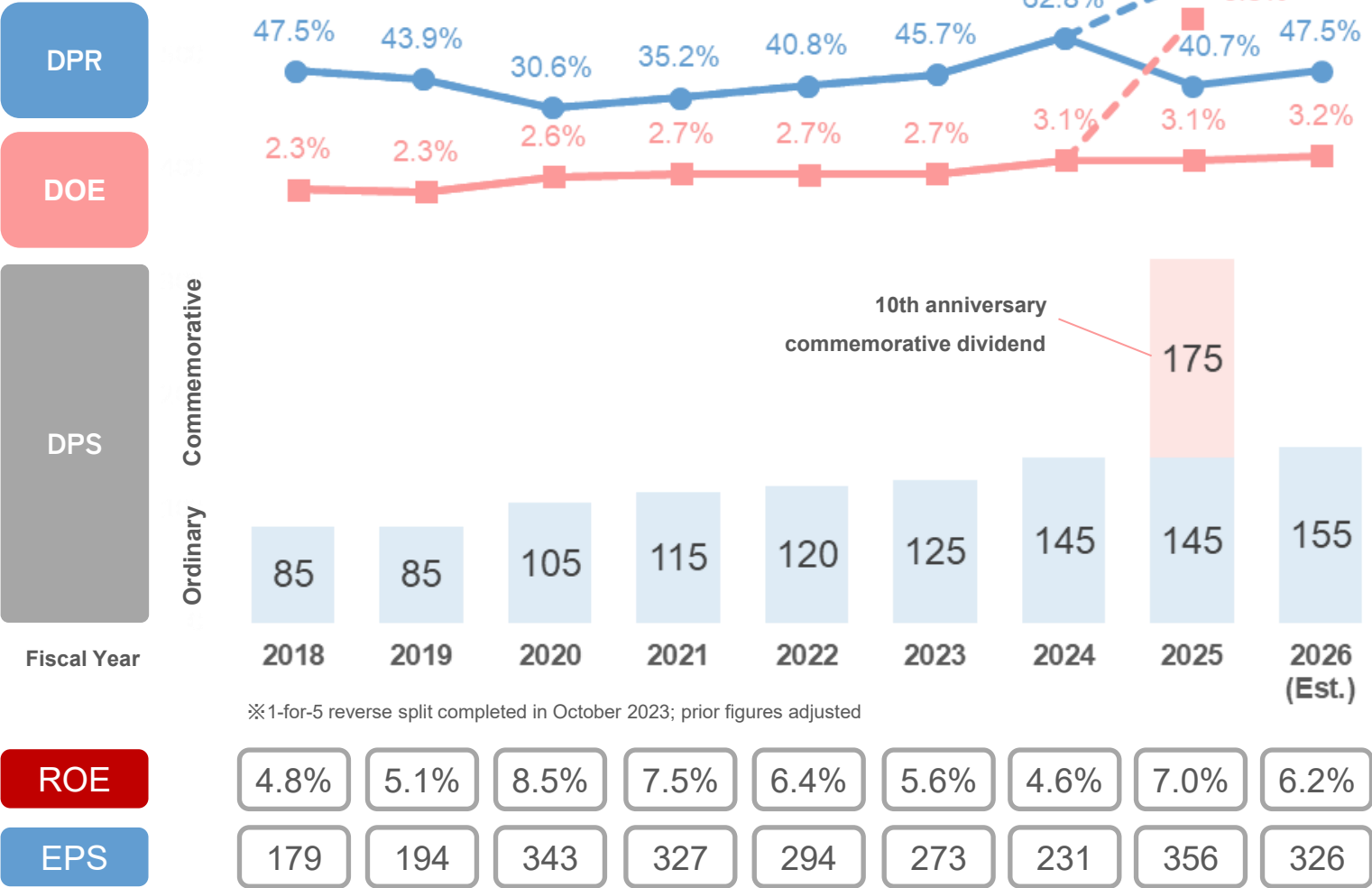


Shareholder Returns

Shareholder Returns

FY2026 (Forecast)
DPS: JPY155
(Interim :75, Year-end dividend: 80)

DOE 3.2% and
Progressive dividend (+¥10)



Under Med-T Plan 2026, we prioritize stable shareholder returns and adopt DOE as our dividend benchmark to reduce sensitivity to earnings volatility

DOE ≥3% and Progressive dividend

DOE = ROE × DPR

*Subject: Ordinary dividend

We base dividends on ROE and payout ratio

*Incl. commemorative dividend

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Income Statement

Results			
	FY2024	FY2025	
	Q4	Q4	Change
Sales	988.8	1,071.4	+82.6
COGS	855.5	924.9	+69.4
Gross Profit	133.3	146.5	+13.2
(% of sales)	13.5	13.7	+0.2
Selling, General and Administrative Expenses	113.7	118.0	+4.3
(% of sales)	11.5	11.0	-0.5
Operating profit	19.6	28.5	+8.9
(% of sales)	2.0	2.7	+0.7
Non-operating Gain/Loss	1.2	1.9	+0.8
Ordinary profit	20.8	30.4	+9.6
(% of sales)	2.1	2.8	+0.7
Extra-ordinary Gain/Loss	-1.5	-0.8	+0.7
Income Before Taxes	19.3	29.6	+10.3
Net Income	13.1	20.2	+7.1
(% of sales)	1.3	1.9	+0.6

Sale of each country and region			
	FY2024	FY2025	
	Q4	Q4	Change
Sales	988.8	1,071.4	+82.6
Japan	839.9	858.7	+18.9
Overseas Total	148.9	212.6	+63.8
(Overseas ratio%)	15.1	19.8	+4.8
Asia	34.4	42.7	+8.3
North America	48.7	76.4	+27.7
Oceania	35.6	49.0	+13.3
Europe	25.7	38.8	+13.1
others	4.4	5.8	+1.4

SG & A Expenses
Non-operational G/L

SG & A Expenses			
	billion yen		
	FY2024	FY2025	
	Q4	Q4	Change
Sales	988.8	1,071.4	+82.6
Selling, General and Administrative	113.7	118.0	+4.3
% of Sales	11.5	11.0	-0.5
Labor Expenses	36.3	38.5	+2.2
Logistics Expenses	50.4	51.7	+1.4
Advertisement and sales promotion	4.6	5.0	+0.4
Packing	1.6	1.6	+0.0
Depreciation	1.7	1.8	+0.0
Other Expenses	19.1	19.4	+0.3

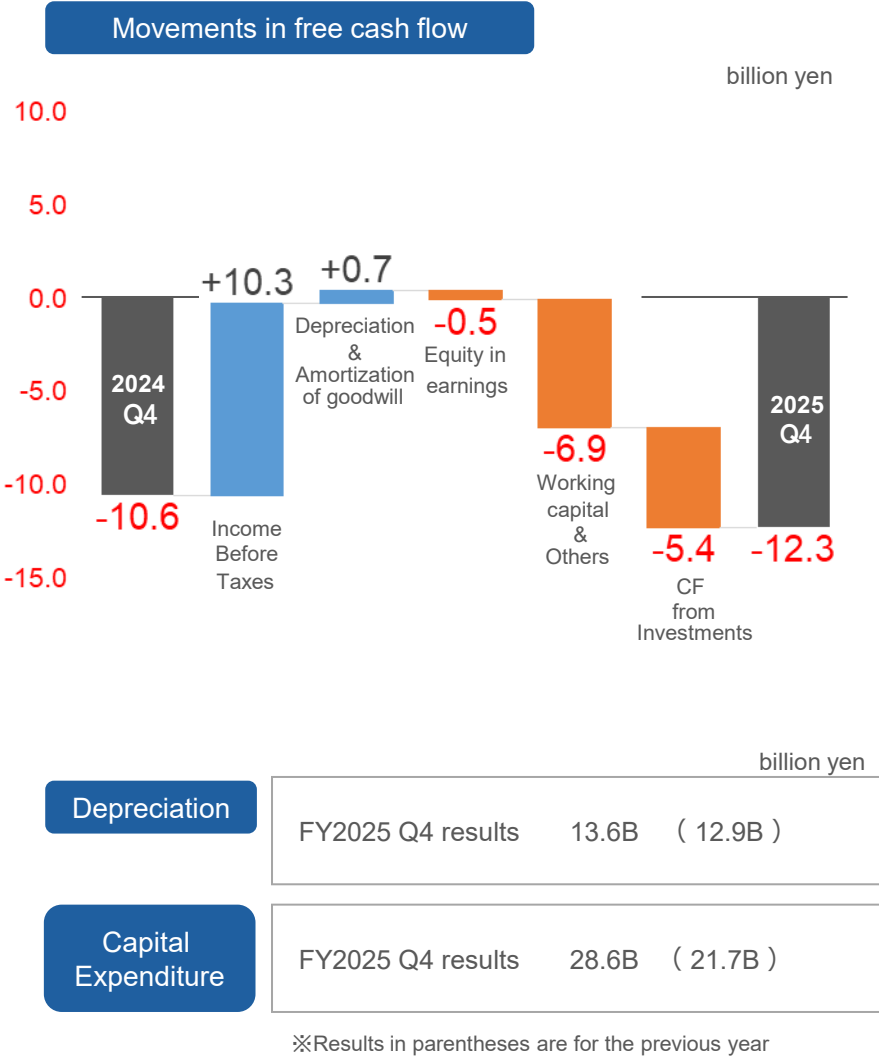
Non-operational Gain/Loss			
	billion yen		
	FY2024	FY2025	
	Q4	Q4	Change
Non-Operational G/L	1.2	1.9	+0.8
Non-controlling interests	1.2	1.7	+0.5
Financing	-1.6	-1.8	-0.2
Subsidy Income	0.5	0.8	+0.3
Insurance Claim Income	0.2	0.2	+0.0
Others	0.9	1.1	+0.1

Extraordinary Gain/Loss			
	billion yen		
	FY2024	FY2025	
	Q4	Q4	Change
Extraordinary G/L	-1.5	-0.8	+0.7
Gain on sale of investment securities	0.3	0.3	-0.0
Loss on retirement of non-current assets	-0.4	-0.3	+0.0
Impairment loss	-1.6	-0.6	+1.0
Others	0.1	-0.2	-0.3



Cash Flow Statement

	billion yen		
	FY2024	FY2025	
	Q4	Q4	Change
①Cash Flow from Operation	10.0	13.7	+3.6
Income Before Taxes	19.3	29.6	+10.3
Depreciation & Amortization of goodw ill	14.6	15.3	+0.7
Change in Recievables	7.8	-8.4	-16.2
Change in Inventories	-18.1	-27.3	-9.3
Change in Payables	-9.0	8.0	+17.0
Others	-4.6	-3.5	+1.1
②Cash Flow from Investments	-20.6	-26.0	-5.4
③Cash Flow from Financing	7.5	8.5	+1.1
④Ending Cash and Securities	20.6	17.6	-3.0
①+②FCF	-10.6	-12.3	-1.7



	Consolidated			Processed Food Div.			Meat Div.		
	FY2024	FY2025		FY2024	FY2025		FY2024	FY2025	
	Q4	Q4	change	Q4	Q4	change	Q4	Q4	change
Sales	988.8	1,071.4	+82.6	400.9	398.6	-2.3	587.9	672.8	+84.9
Ham & Sausage	187.6	187.5	-0.1	174.8	175.5	+0.7	12.7	12.0	-0.8
Regular	177.0	177.9	+0.9	164.2	165.9	+1.7	12.7	12.0	-0.8
Gift	10.6	9.6	-1.0	10.6	9.6	-1.0	-	-	-
Cooked Foods	162.5	166.0	+3.5	140.4	138.7	-1.7	22.1	27.3	+5.2
Meat	608.7	682.9	+74.2	81.0	80.0	-1.0	527.7	602.9	+75.2
Beef	281.9	313.3	+31.4	34.8	35.6	+0.8	247.1	277.7	+30.6
Pork	193.5	195.6	+2.1	26.9	27.2	+0.4	166.6	168.3	+1.7
Chicken	89.6	103.4	+13.8	19.0	16.8	-2.2	70.7	86.6	+16.0
Lamb & Others	43.7	70.7	+27.0	0.4	0.4	-0.0	43.3	70.3	+27.0
Others	29.9	34.9	+5.0	4.6	4.3	-0.3	25.3	30.6	+5.2

02 Supplemental Data

Growth rates by category and product for key household items (Quarterly Trends)

- Our market share
- Our sales growth rate
- Market purchase value growth rate

		FY2024				FY2025			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Ham & Sausage	Share(%)	22.0	21.9	22.6	21.7	22.5	22.4	23.2	21.4
	YoY	+1.0	+1.2	+0.4	+0.4	+0.5	+0.6	+0.6	-0.3
	Sales Growth Rate	+1.4	+3.1	+0.3	+1.8	+3.2	-0.0	-1.1	+0.2
Wiener	Share(%)	20.6	20.4	19.9	19.9	21.0	20.8	20.2	19.6
	YoY	+0.4	+0.7	+0.8	+0.7	+0.4	+0.4	+0.3	-0.4
	Sales Growth Rate	-1.9	+1.8	+1.1	+1.6	+3.5	-0.6	+0.0	+2.8
The GRAND Alt Bayern	Share(%)	6.8	6.2	6.8	6.3	7.2	7.3	7.7	7.0
	YoY	+0.3	+0.2	+0.3	-0.0	+0.4	+1.0	+0.8	+0.7
	Sales Growth Rate	-1.7	+3.3	-1.9	-3.7	+8.0	+3.6	+8.7	+12.9
Pork Bits	Share(%)	2.5	2.6	2.2	2.5	2.8	2.7	2.2	2.5
	YoY	+0.1	+0.1	+0.0	+0.1	+0.3	+0.1	+0.0	+0.1
	Sales Growth Rate	+5.0	+4.4	+4.5	+2.5	+5.2	+4.0	-1.0	+0.3
Gotenba Arabiki	Share(%)	1.9	1.7	2.0	2.0	2.0	2.0	2.0	1.8
	YoY	+0.2	-0.2	+0.1	+0.2	+0.1	+0.3	+0.0	-0.2
	Sales Growth Rate	+14.4	+8.5	+8.3	+7.1	+4.9	+6.5	+2.3	-5.5
Ham & Bacon	Share(%)	24.0	23.9	25.1	24.2	24.8	24.8	26.3	24.6
	YoY	+2.0	+1.7	+0.0	-0.1	+0.8	+0.9	+1.2	+0.3
	Sales Growth Rate	+3.3	+4.1	+1.0	+1.6	+2.1	+2.3	+1.8	+3.0
Asa no Fresh	Share(%)	10.2	10.3	8.5	9.9	11.0	11.0	9.6	10.2
	YoY	+1.1	+1.5	+0.1	+0.1	+0.8	+0.7	+1.1	+0.4
	Sales Growth Rate	+12.1	+13.7	+1.0	+2.1	+4.1	+4.7	+6.7	+2.1
Ibushikobo	Share(%)	2.6	3.1	2.6	2.8	3.0	3.2	2.9	3.2
	YoY	+0.2	+0.3	+0.1	+0.1	+0.3	+0.2	+0.3	+0.3
	Sales Growth Rate	+18.8	+18.8	+21.9	+16.8	+11.8	+15.0	+9.8	+12.0
Genkei Bacon	Share(%)	1.6	1.5	1.7	2.0	1.7	1.5	1.7	2.0
	YoY	-0.0	-0.1	-0.2	+0.2	+0.1	-0.0	-0.0	+0.0
	Sales Growth Rate	+2.9	+3.9	+4.0	+0.3	+0.9	+1.7	-2.7	-2.3
CH Cooked Chicken	Share(%)	22.2	20.6	23.4	20.7	22.4	20.4	22.4	20.8
	YoY	-0.0	-1.5	-1.1	-2.4	+0.2	-0.2	-1.0	+0.1
	Sales Growth Rate	-6.3	-11.4	-6.0	-8.3	-3.8	-5.9	-4.2	+1.8
Salad Chicken	Share(%)	8.7	8.1	6.8	7.6	8.5	8.1	6.7	6.9
	YoY	-0.0	-1.0	-1.5	-0.8	-0.1	-0.0	-0.1	-0.7
	Sales Growth Rate	+2.2	-6.7	-5.8	-8.0	-7.8	-1.8	+6.4	+10.5
Chicken Nugget	Share(%)	5.0	4.1	5.6	4.5	5.6	4.6	5.3	4.7
	YoY	+0.5	+0.2	+0.6	-0.8	+0.6	+0.6	-0.3	+0.2
	Sales Growth Rate	+1.9	+2.5	+2.5	-10.5	+4.6	-7.0	-10.0	-6.1
CH Pizza & Snack	Share(%)	32.5	32.4	36.7	33.3	31.7	33.9	37.2	31.2
	YoY	+2.9	+2.5	-0.1	-0.8	-0.7	+1.5	+0.5	-2.1
	Sales Growth Rate	+12.8	+11.2	-5.1	-4.4	-6.0	-8.0	+1.4	-3.9
Pizza Garden	Share(%)	19.9	20.6	16.9	18.1	19.0	18.6	16.9	15.7
	YoY	+5.5	+5.4	+1.5	+1.6	-0.9	-2.0	+0.0	-2.4
	Sales Growth Rate	+37.2	+36.4	+9.3	+3.2	-5.5	-14.7	-5.7	-12.1
La Pizza	Share(%)	5.2	4.0	3.5	3.3	3.8	3.8	3.2	3.1
	YoY	-2.3	-3.0	-3.6	-3.6	-1.5	-0.2	-0.3	-0.1
	Sales Growth Rate	-25.0	-31.9	-43.9	-42.5	-22.3	-16.8	+5.0	-11.3

FY2025
Quarterly Results
Details

billion yen

		Q1			Q2			Q3			Q4		
		Apr - Jun			Jul - Sep			Oct - Dec			Jan - Mar		
		FY2024 results	FY2025 results	Change	FY2024 results	FY2025 results	Change	FY2024 results	FY2025 results	Change	FY2024 results	FY2025 results	Change
Consolidated	Sales	235.8	297.1	+61.3	255.1	245.3	-9.9	267.6	277.7	+10.1	230.3	251.4	+21.1
	Operating profit	3.9	9.1	+5.2	4.9	4.0	-0.8	8.4	8.6	+0.3	2.4	6.7	+4.3
	Operating profit margin %	1.7	3.1	+1.4	1.9	1.6	-0.3	3.1	3.1	-0.0	1.0	2.7	+1.6
	Ordinary profit	4.4	9.2	+4.8	4.7	4.5	-0.2	9.0	9.7	+0.8	2.8	7.0	+4.3
	Ordinary profit margin %	1.9	3.1	+1.2	1.8	1.8	-0.0	3.3	3.5	+0.2	1.2	2.8	+1.6
Processed Food Div.	Sales	96.9	100.3	+3.4	100.6	98.3	-2.2	113.3	111.1	-2.2	90.2	88.8	-1.3
	Operating profit	2.0	2.1	+0.1	1.6	1.5	-0.0	4.8	4.2	-0.6	0.8	1.1	+0.3
	Operating profit margin %	2.0	2.1	+0.1	1.6	1.6	-0.0	4.2	3.7	-0.5	0.9	1.2	+0.3
	Ordinary profit	2.1	2.2	+0.1	1.8	1.6	-0.1	4.9	4.3	-0.6	0.9	1.2	+0.3
	Ordinary profit margin %	2.2	2.2	+0.0	1.7	1.7	-0.1	4.3	3.9	-0.5	1.0	1.4	+0.4
Meat Div.	Sales	138.9	196.8	+57.9	154.6	146.9	-7.7	154.3	166.6	+12.3	140.1	162.5	+22.4
	Operating profit	2.5	7.5	+5.0	3.7	2.9	-0.8	3.9	4.9	+1.0	2.0	6.1	+4.1
	Operating profit margin %	1.8	3.8	+2.0	2.4	2.0	-0.4	2.6	2.9	+0.4	1.4	3.7	+2.3
	Ordinary profit	2.6	7.3	+4.7	3.3	3.2	-0.1	4.2	5.7	+1.5	2.2	6.4	+4.2
	Ordinary profit margin %	1.9	3.7	+1.8	2.1	2.2	+0.1	2.7	3.4	+0.7	1.6	3.9	+2.4
Others • Adj	Sales	0.0	0.0	-0.0	0.0	0.0	-0.0	0.0	0.0	-0.0	0.0	0.0	+0.0
	Operating profit	-0.6	-0.5	+0.1	-0.4	-0.4	+0.0	-0.3	-0.4	-0.1	-0.3	-0.5	-0.2
	Ordinary profit	-0.4	-0.4	+0.0	-0.4	-0.4	-0.0	-0.2	-0.3	-0.2	-0.3	-0.6	-0.2

Profit Change
Analysis Trends

billion yen

Processed Food Div.	H1	H2			Year		
	results	Rev 4-Nov.	Rev 5-Feb.	results	Rev 4-Nov.	Rev 5-Feb.	results
FY2024 Ordinary profit	3.9	5.8	5.8	5.8	9.7	9.7	9.7
Sales Volume	-1.4	-	-0.5	-1.2	-1.4	-1.9	-2.6
Gross Margin,SG&A	+5.3	+1.2	+1.6	+1.8	+6.5	+6.9	+7.0
Ingredient,utility Costs	-3.0	-0.5	-0.0	+0.2	-3.5	-3.0	-2.8
Logistics cost impact	-0.8	-0.5	-0.9	-1.1	-1.3	-1.7	-1.9
Non-operating income and expenses	-0.1	-0.1	+0.1	-0.0	-0.2	-0.0	-0.1
Others	-0.0	+0.2	+0.1	+0.0	+0.2	+0.1	-0.0
FY2025 Ordinary profit	3.9	6.1	6.1	5.5	10.0	10.0	9.4

Meat Div.	H1	H2			Year		
	results	Rev 4-Nov.	Rev 5-Feb.	results	Rev 4-Nov.	Rev 5-Feb.	results
FY2024 Ordinary profit	5.9	6.4	6.4	6.4	12.3	12.3	12.3
Sales Volume	+0.1	-	-	+0.1	+0.1	+0.1	+0.1
Gross Margin,SG&A	+0.5	+0.4	+0.5	+2.0	+0.9	+1.0	+2.5
Market and feed price(Farm cost)	+1.6	+1.3	+1.0	+1.0	+2.9	+2.6	+2.6
Logistics cost impact	-0.3	-0.5	-0.3	-0.1	-0.8	-0.6	-0.4
Overseas Operation	+2.5	+1.6	+2.2	+2.7	+4.1	+4.7	+5.2
Non-operating income and expenses	+0.2	-0.2	-	+0.1	+0.1	+0.2	+0.4
Others	+0.0	+0.1	-0.2	-0.0	+0.1	-0.1	-0.0
FY2025 Ordinary profit	10.5	9.0	9.5	12.1	19.5	20.0	22.6

Others・Adj	H1	H2			Year		
	results	Rev 4-Nov.	Rev 5-Feb.	results	Rev 4-Nov.	Rev 5-Feb.	results
FY2024 Ordinary profit	-0.7	-0.5	-0.5	-0.5	-1.2	-1.2	-1.2
Non-operating income and expenses	-0.1	-0.3	-0.3	-0.2	-0.4	-0.4	-0.3
Others	+0.1	+0.1	+0.1	-0.2	+0.2	+0.2	-0.1
FY2025 Ordinary profit	-0.7	-0.8	-0.8	-0.9	-1.5	-1.5	-1.6

FY2026
Forecast Details

		billion yen								
		H1			H2			Year		
		FY2025 results	FY2026 F'cast	Change	FY2025 results	FY2026 F'cast	Change	FY2025 results	FY2026 F'cast	Change
			Rev 1-May			Rev 1-May			Rev 1-May	
Consolidated	Sales	542.4	510.0	-32.4	529.0	530.0	+1.0	1,071.4	1,040.0	-31.4
	Operating profit	13.2	13.8	+0.6	15.3	13.2	-2.1	28.5	27.0	-1.5
	Operating profit margin %	2.4	2.7	+0.3	2.9	2.5	-0.4	2.7	2.6	-0.1
	Ordinary profit	13.6	14.0	+0.4	16.8	14.0	-2.8	30.4	28.0	-2.4
	Ordinary profit margin %	2.5	2.7	+0.2	3.2	2.6	-0.5	2.8	2.7	-0.1
Processed Food Div.	Sales	198.6	205.0	+6.4	199.9	205.0	+5.1	398.6	410.0	+11.4
	Operating profit	3.7	4.0	+0.3	5.2	5.8	+0.6	8.9	9.8	+0.9
	Operating profit margin %	1.8	1.9	+0.1	2.6	2.8	+0.2	2.2	2.4	+0.2
	Ordinary profit	3.9	4.0	+0.1	5.5	6.0	+0.5	9.4	10.0	+0.6
	Ordinary profit margin %	2.0	2.0	-0.0	2.8	2.9	+0.2	2.4	2.4	+0.1
Meat Div.	Sales	343.7	305.0	-38.7	329.1	325.0	-4.1	672.8	630.0	-42.8
	Operating profit	10.4	10.3	-0.1	11.0	8.2	-2.8	21.4	18.5	-2.9
	Operating profit margin %	3.0	3.4	+0.4	3.3	2.5	-0.8	3.2	2.9	-0.2
	Ordinary profit	10.5	10.5	+0.0	12.1	9.0	-3.1	22.6	19.5	-3.1
	Ordinary profit margin %	3.0	3.4	+0.4	3.7	2.8	-0.9	3.4	3.1	-0.3
Others - Adj	Sales	0.0	0.0	-0.0	0.0	0.0	-0.0	0.0	0.0	-0.0
	Operating profit	-0.9	-0.5	+0.4	-0.9	-0.8	+0.1	-1.8	-1.3	+0.5
	Ordinary profit	-0.7	-0.5	+0.2	-0.9	-1.0	-0.1	-1.6	-1.5	+0.1

01 Earnings Results

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02 Supplemental Data 23

03 Appendix 33

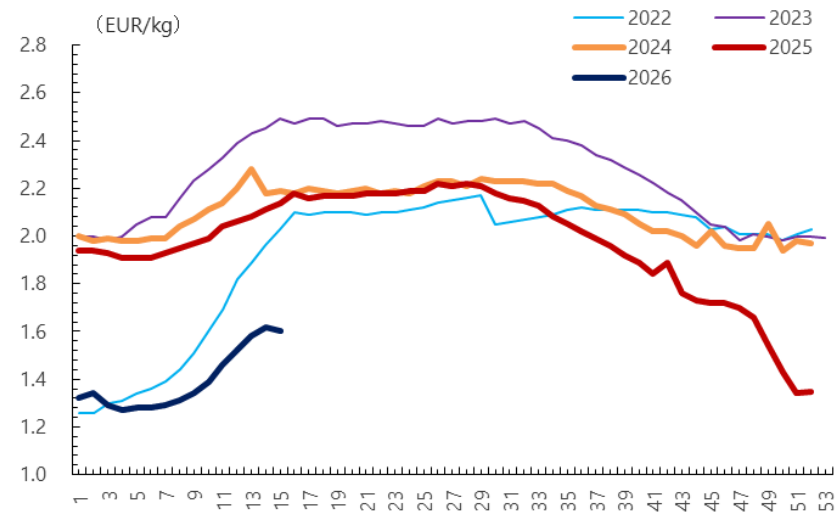
Note:

The financial information disclosed by Japanese GAAP and FY2026 shows from Apr 1, 2026 to March 31, 2027.
This material is rounded off to second decimal places. Therefore, sums and differences of figures may not equal totals.

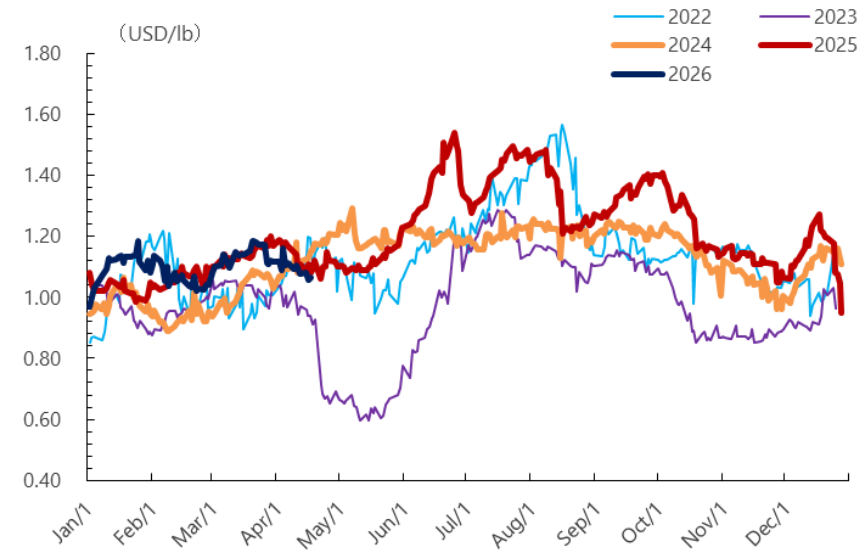
Overseas Markets



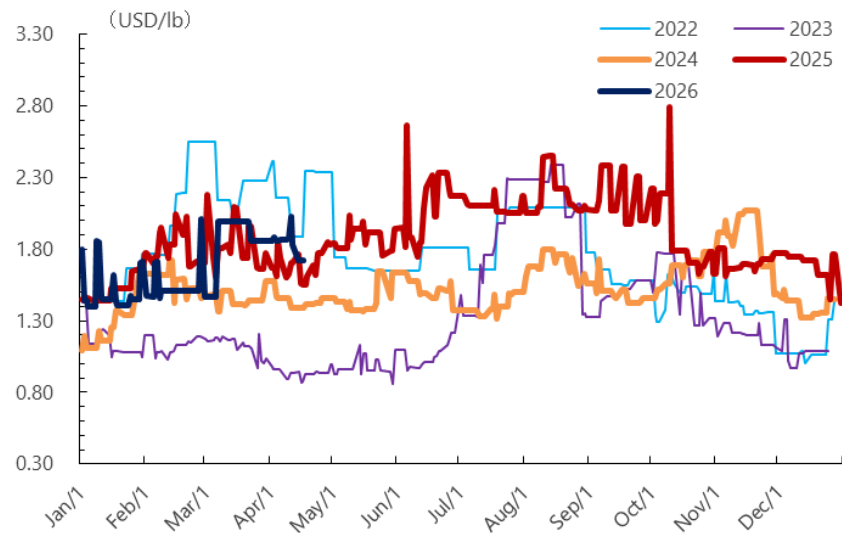
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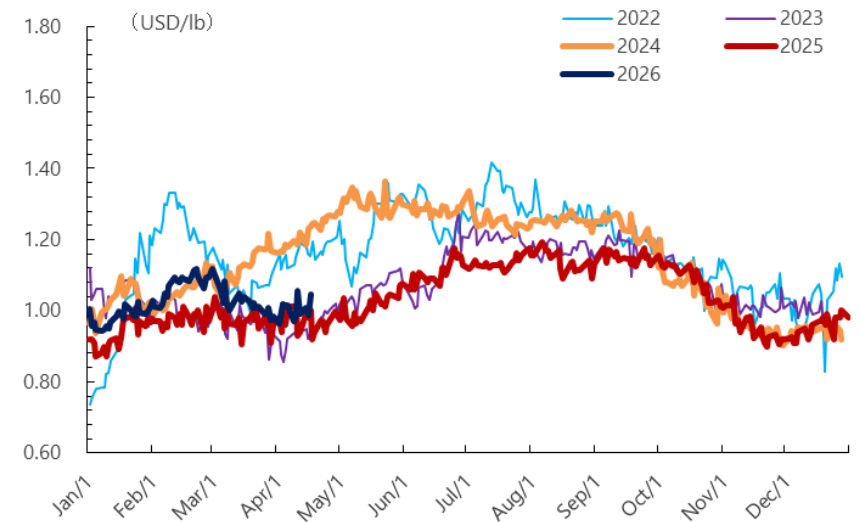
Picnic - USA



Pork Bellies - USA



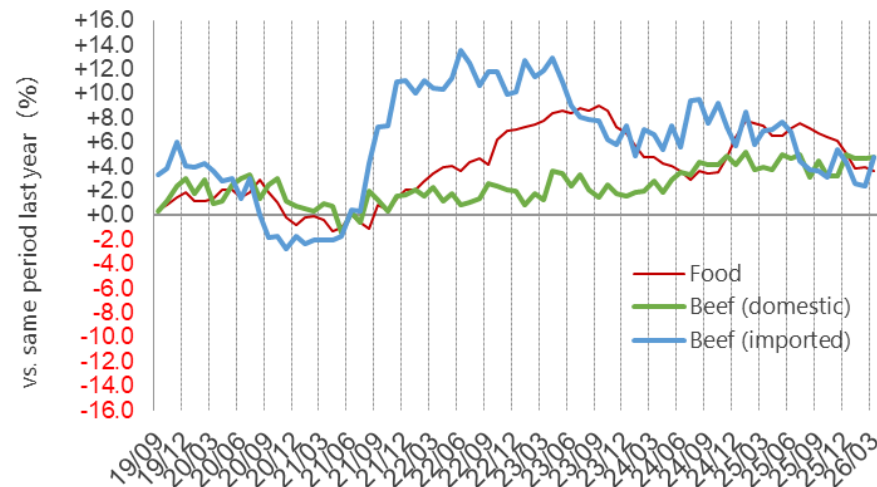
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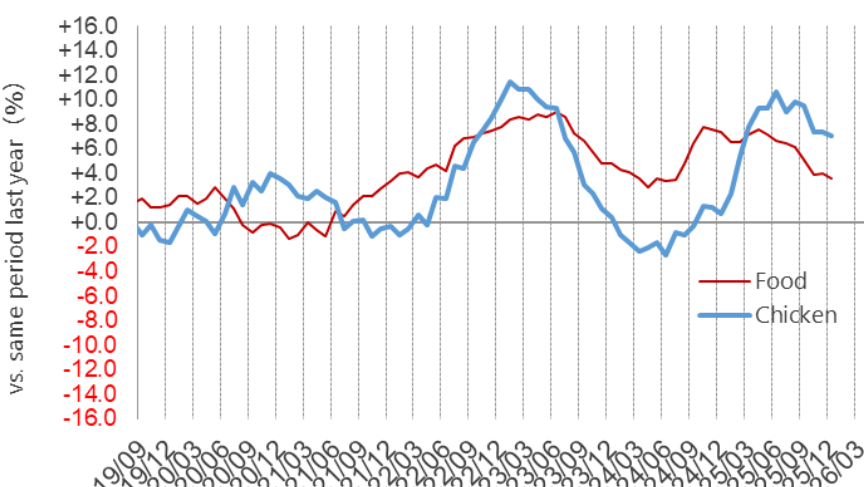
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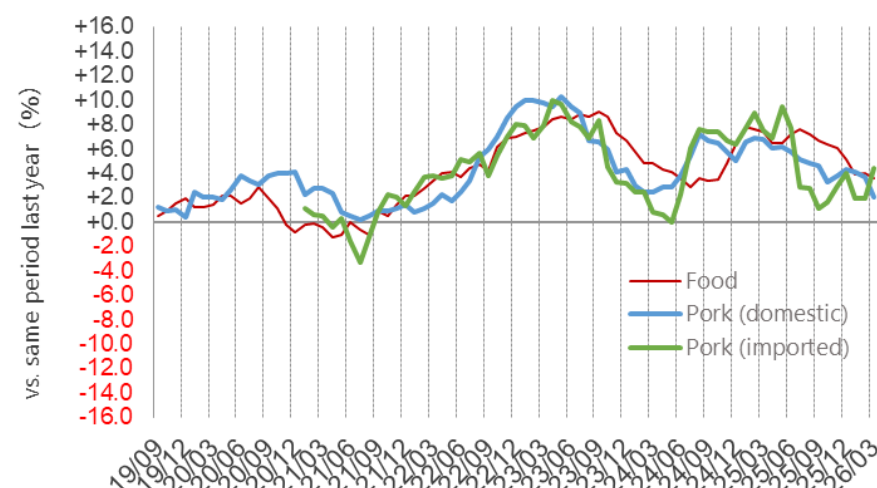
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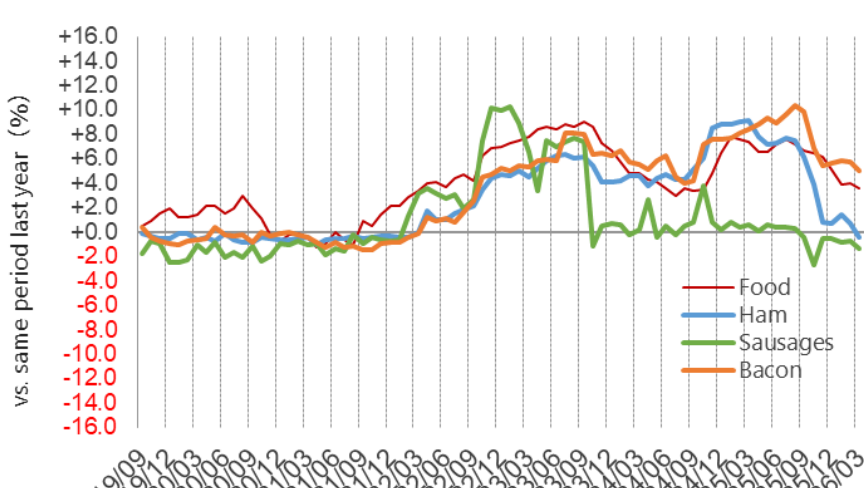
Chicken



Pork



Processed Meat



Ham & Sausage Supply

Apr.-Feb.

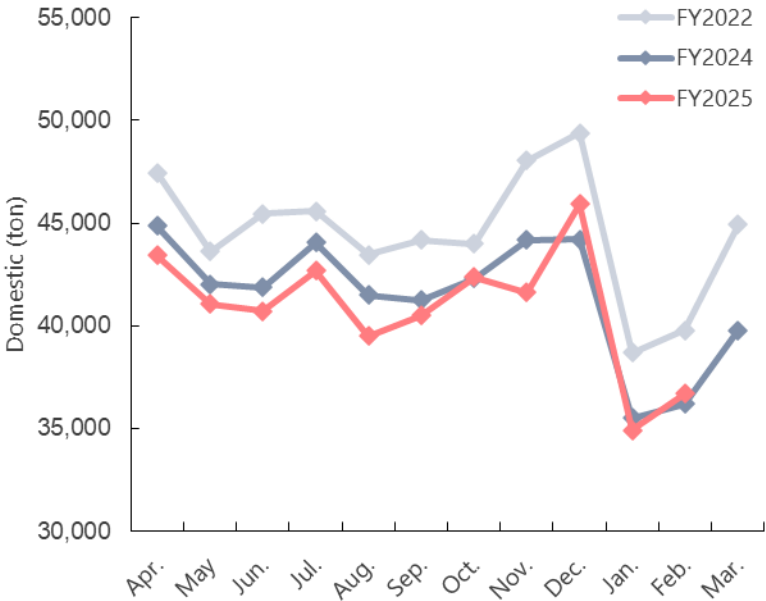
【Domestic】 YoY -1.9%
FY2024 457,967 ton
FY2025 449,375 ton

【Import】 YoY -4.9%
FY2024 29,826 ton
FY2025 28,379 ton

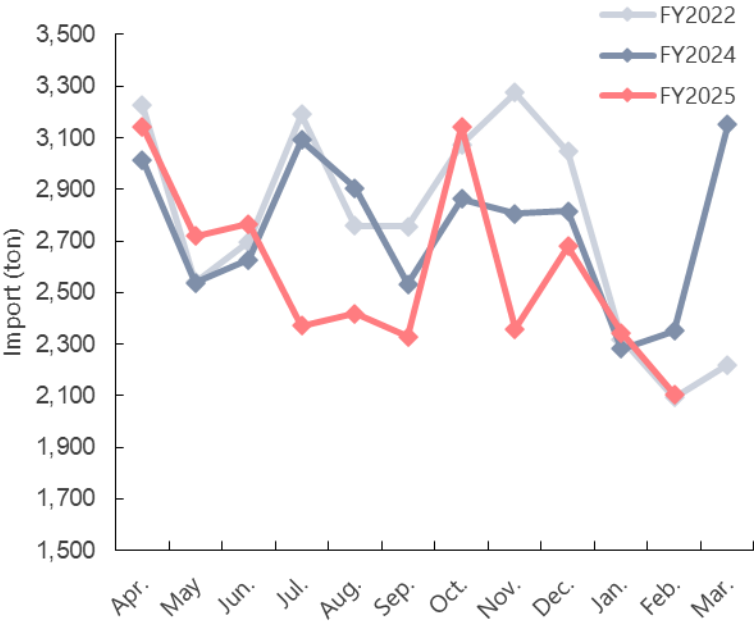
【Total】 YoY -2.1%
FY2024 487,793 ton
FY2025 477,753 ton



Domestic Production



Imports



			(ton)												
			Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Year
Domestic	FY2024	Volume	44,867	42,018	41,873	44,046	41,485	41,252	42,311	44,167	44,220	35,518	36,210	39,779	497,746
		(change%)	-1.6%	-3.8%	-8.3%	-0.9%	-4.7%	-3.1%	-3.7%	-4.4%	-5.7%	-3.5%	-8.0%	-7.3%	-4.6%
	FY2025	Volume	43,426	41,061	40,704	42,678	39,497	40,498	42,361	41,622	45,916	34,917	36,695		449,375
		(change%)	-3.2%	-2.3%	-2.8%	-3.1%	-4.8%	-1.8%	0.1%	-5.8%	3.8%	-1.7%	1.3%		-1.9%
Import	FY2024	Volume	3,015	2,538	2,626	3,093	2,905	2,533	2,862	2,806	2,817	2,282	2,351	3,151	32,977
		(change%)	-0.2%	14.9%	-5.8%	6.4%	-3.2%	-1.6%	9.8%	6.6%	5.1%	22.5%	13.3%	38.9%	7.7%
	FY2025	Volume	3,144	2,719	2,767	2,370	2,419	2,328	3,143	2,358	2,680	2,344	2,107		28,379
		(change%)	4.3%	7.1%	5.4%	-23.4%	-16.7%	-8.1%	9.8%	-16.0%	-4.8%	2.7%	-10.4%		-4.9%
Total	FY2024	Volume	47,881	44,556	44,499	47,139	44,390	43,785	45,173	46,973	47,036	37,800	38,561	42,930	530,723
		(change%)	-1.6%	-2.9%	-8.2%	-0.4%	-4.6%	-3.1%	-3.0%	-3.8%	-5.1%	-2.2%	-6.9%	-5.0%	-3.9%
	FY2025	Volume	46,571	43,780	43,472	45,048	41,915	42,826	45,503	43,980	48,597	37,261	38,802		477,753
		(change%)	-2.7%	-1.7%	-2.3%	-4.4%	-5.6%	-2.2%	0.7%	-6.4%	3.3%	-1.4%	0.6%		-2.1%

03 Appendix

Ham/Sausage Domestic Market Share

【 Share 】

Apr.-Mar.

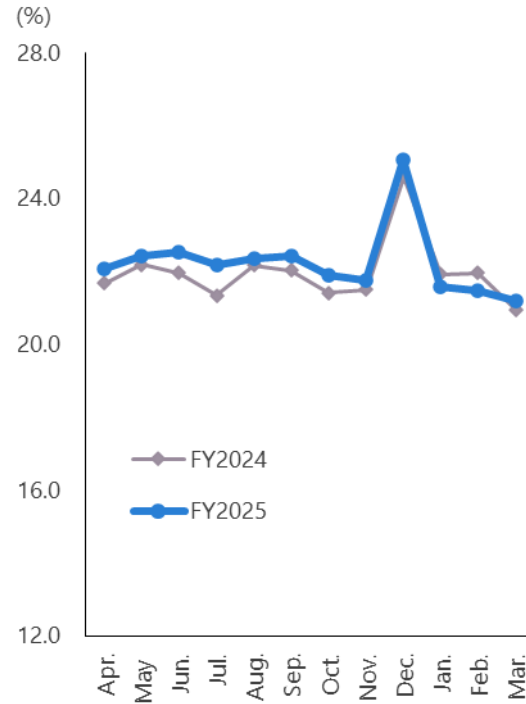
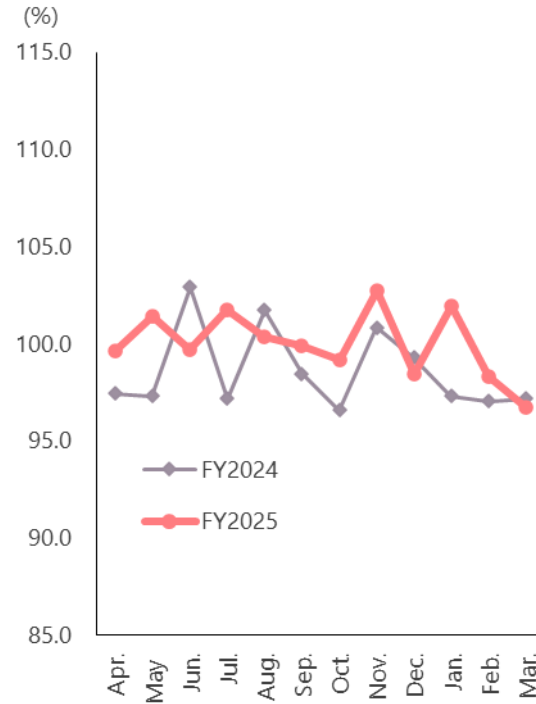
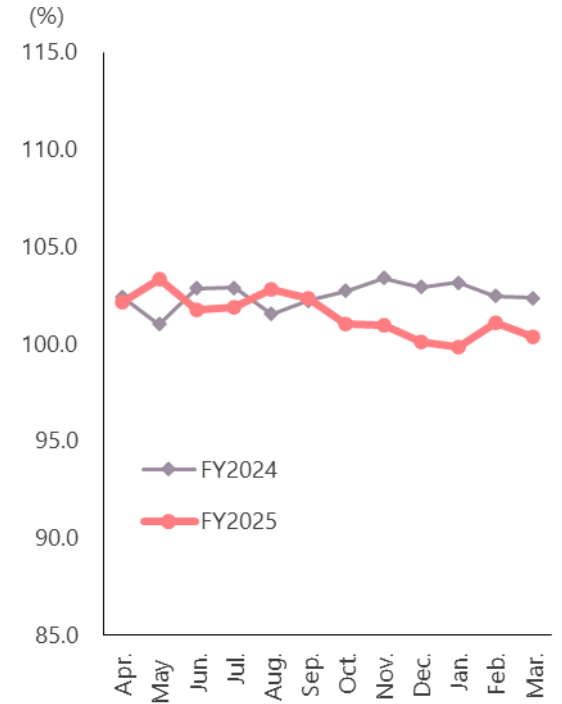
Last year 22.1%

This year 22.4%

YoY +0.3%



Our share

ham/sausage domestic market
Value per 100 monitors year-on-yearham/sausage domestic market
Average price year-on-year

	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Year
【share】													
FY2024	21.7	22.2	22.0	21.3	22.2	22.0	21.4	21.5	24.6	21.9	22.0	21.0	22.1
FY2025	22.1	22.4	22.5	22.2	22.4	22.4	21.9	21.8	25.1	21.6	21.5	21.2	22.4
【value per 100 monitors year-on-year】													
FY2024	97.5	97.3	102.9	97.2	101.7	98.5	96.6	100.8	99.3	97.3	97.1	97.2	99.0
FY2025	99.6	101.4	99.7	101.8	100.4	99.9	99.2	102.7	98.5	102.0	98.3	96.7	99.9
【Average price year-on-year】													
FY2024	102.4	101.0	102.9	102.9	101.5	102.2	102.7	103.4	102.9	103.2	102.5	102.4	102.6
FY2025	102.2	103.3	101.8	101.9	102.8	102.3	101.0	101.0	100.1	99.8	101.1	100.3	101.4

03 Appendix

Wiener Domestic Market Share

【 Share 】

Apr.-Mar.

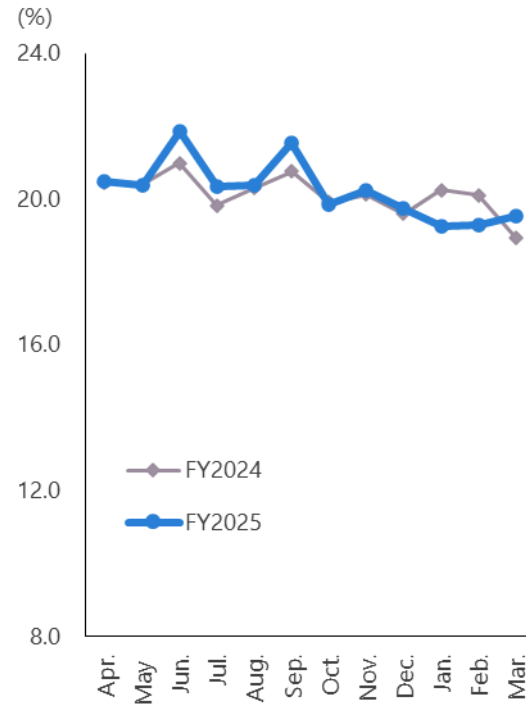
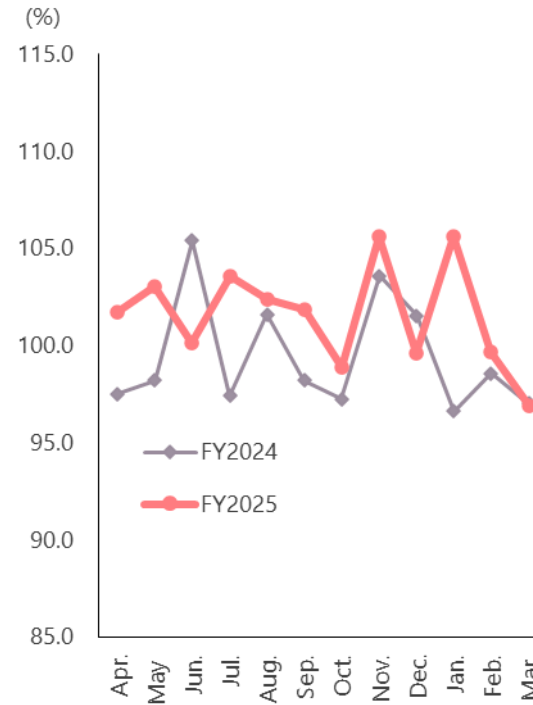
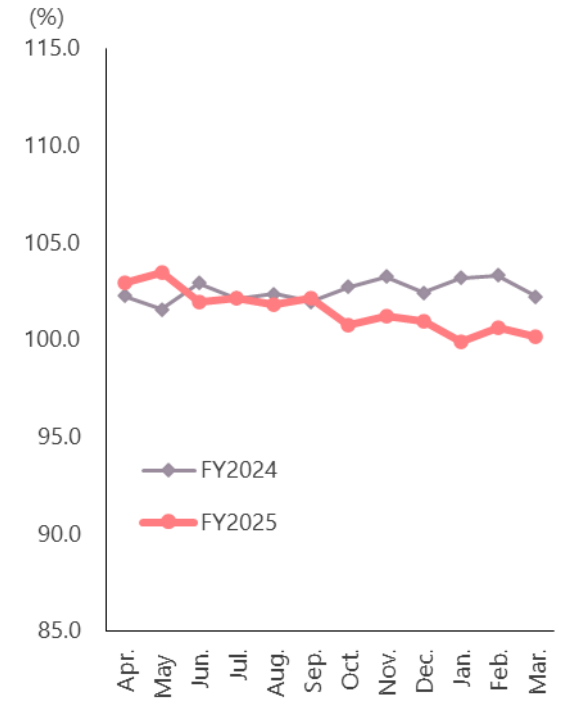
Last year 20.2%

This year 20.4%

YoY +0.2%



Our share

Wiener domestic market
Value per 100 monitors year-on-yearWiener domestic market
Average price year-on-year

	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Year
【share】													
FY2024	20.4	20.4	21.0	19.8	20.3	20.8	19.9	20.1	19.6	20.3	20.1	18.9	20.2
FY2025	20.5	20.4	21.9	20.3	20.4	21.5	19.8	20.2	19.8	19.2	19.3	19.5	20.4
【value per 100 monitors year-on-year】													
FY2024	97.5	98.2	105.4	97.4	101.6	98.2	97.2	103.6	101.5	96.6	98.6	97.0	99.8
FY2025	101.7	103.0	100.1	103.6	102.4	101.9	98.9	105.6	99.6	105.6	99.7	96.9	101.3
【Average price year-on-year】													
FY2024	102.3	101.6	102.9	102.1	102.3	101.9	102.7	103.2	102.4	103.2	103.3	102.2	102.5
FY2025	102.9	103.4	101.9	102.1	101.8	102.1	100.8	101.2	100.9	99.9	100.6	100.1	101.3

03 Appendix

Slice Pack of Ham, Bacon, etc. Domestic Market Share

【 Share 】

Apr.-Mar.

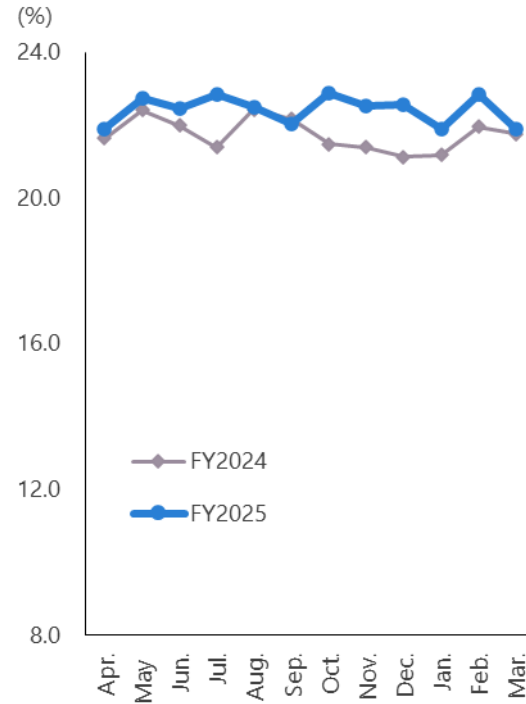
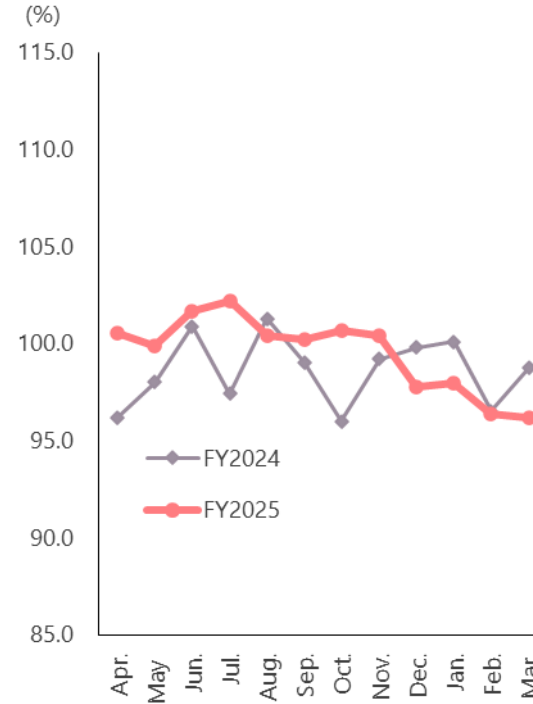
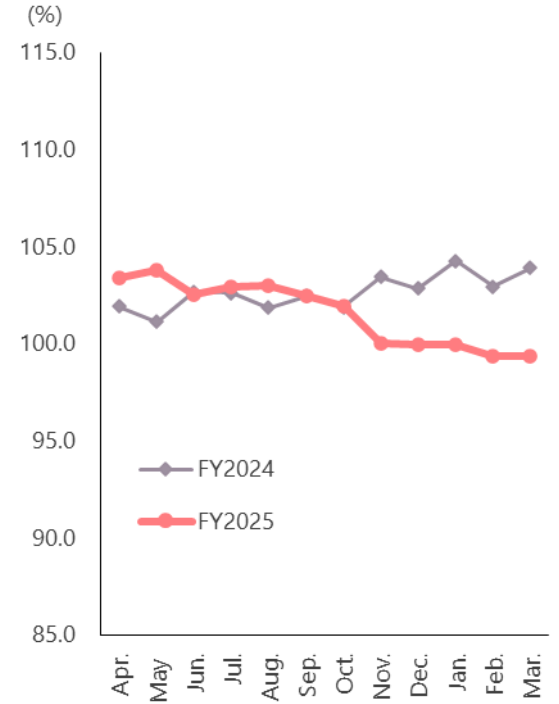
Last year 21.8%

This year 22.5%

YoY +0.7%



Our share

Slice pack of ham, bacon, etc. domestic market
Value per 100 monitors year-on-yearSlice pack of ham, bacon, etc. domestic market
Average price year-on-year

	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Year
【share】													
FY2024	21.6	22.4	22.0	21.4	22.4	22.2	21.5	21.4	21.1	21.2	22.0	21.8	21.8
FY2025	21.9	22.7	22.5	22.8	22.5	22.0	22.9	22.5	22.6	21.9	22.9	21.9	22.5
【value per 100 monitors year-on-year】													
FY2024	96.2	98.0	100.9	97.4	101.3	99.0	96.0	99.2	99.8	100.1	96.6	98.7	98.7
FY2025	100.6	99.9	101.7	102.2	100.4	100.2	100.7	100.4	97.8	98.0	96.4	96.2	99.9
【Average price year-on-year】													
FY2024	101.9	101.1	102.7	102.6	101.9	102.4	101.9	103.4	102.8	104.3	102.9	103.9	102.6
FY2025	103.4	103.8	102.5	102.9	103.0	102.4	102.0	100.0	100.0	100.0	99.3	99.4	101.6

03 Appendix

Pizza/Snacks Domestic Market Share

【 Share 】

Apr.-Mar.

Last year

33.8%

This year

33.6%

YoY

-0.2%



03 Appendix

Hamburger steak/ Meatball Domestic Market Share

【 Share 】

Apr.-Mar.

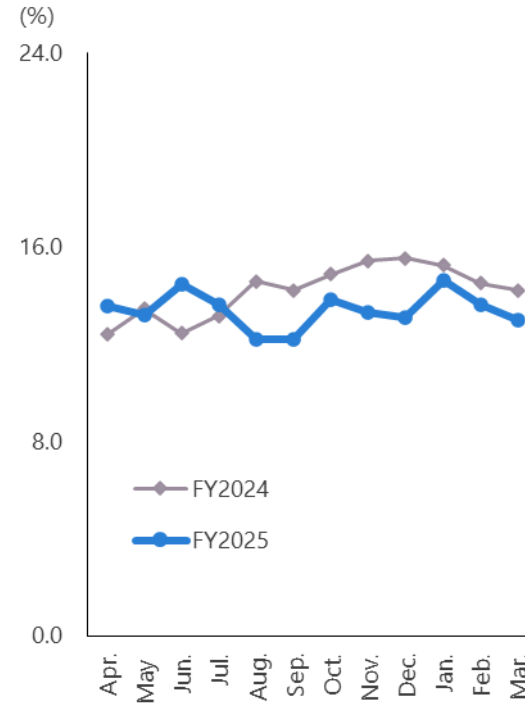
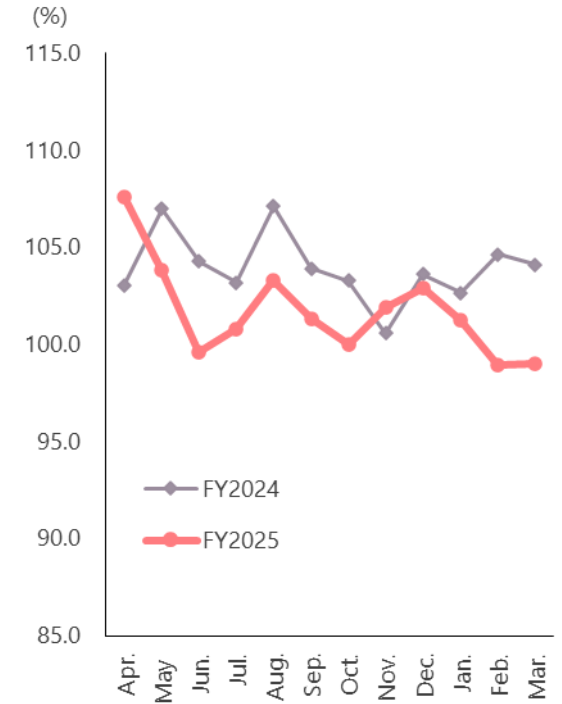
Last year 14.2%

This year 13.4%

YoY -0.8%



Our share

Hamburger steak/Meatball domestic market
Value per 100 monitors year-on-yearHamburger steak/Meatball domestic market
Average price year-on-year

	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Year
【share】													
FY2024	12.4	13.5	12.5	13.2	14.6	14.2	14.9	15.4	15.6	15.3	14.5	14.2	14.2
FY2025	13.6	13.2	14.5	13.7	12.2	12.2	13.9	13.3	13.1	14.7	13.6	13.0	13.4
【value per 100 monitors year-on-year】													
FY2024	99.7	108.8	108.8	105.6	111.7	103.5	103.3	100.6	109.6	100.5	106.8	103.7	105.6
FY2025	106.9	99.6	96.4	96.0	101.2	99.4	97.6	102.4	97.0	100.8	95.2	94.7	99.4
【Average price year-on-year】													
FY2024	103.0	107.0	104.3	103.2	107.1	103.9	103.3	100.6	103.6	102.7	104.6	104.1	103.8
FY2025	107.6	103.9	99.6	100.8	103.3	101.3	100.0	101.9	102.9	101.2	99.0	99.0	101.6

03 Appendix

Processed Chicken Food Domestic Market Share

【 Share 】

Apr.-Mar.

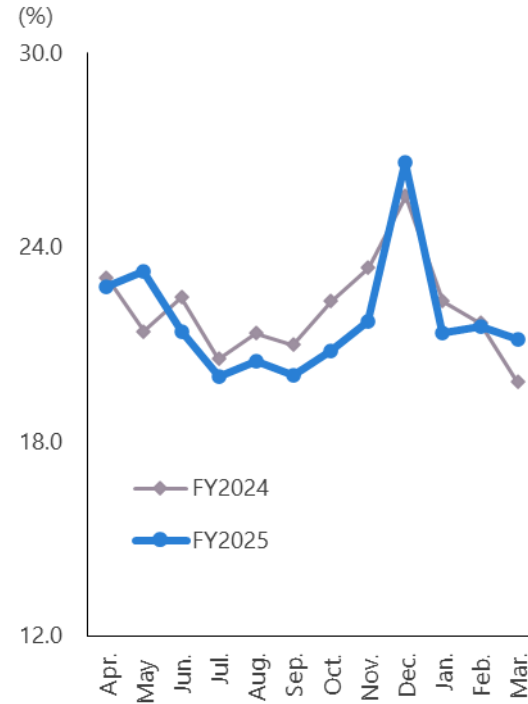
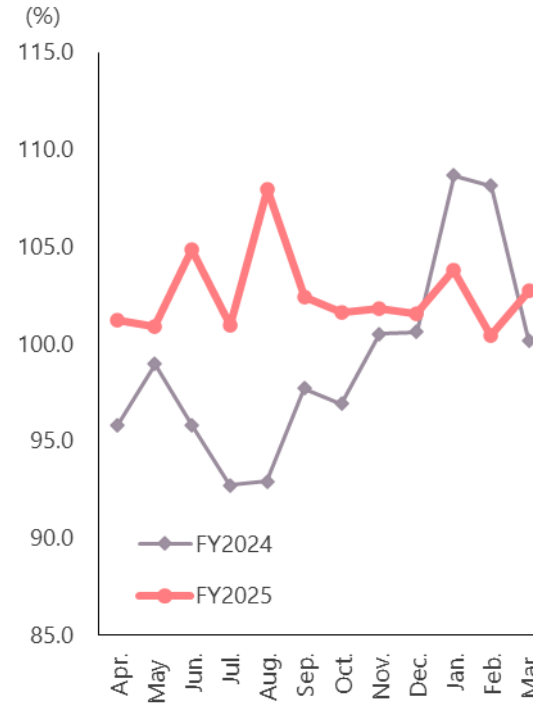
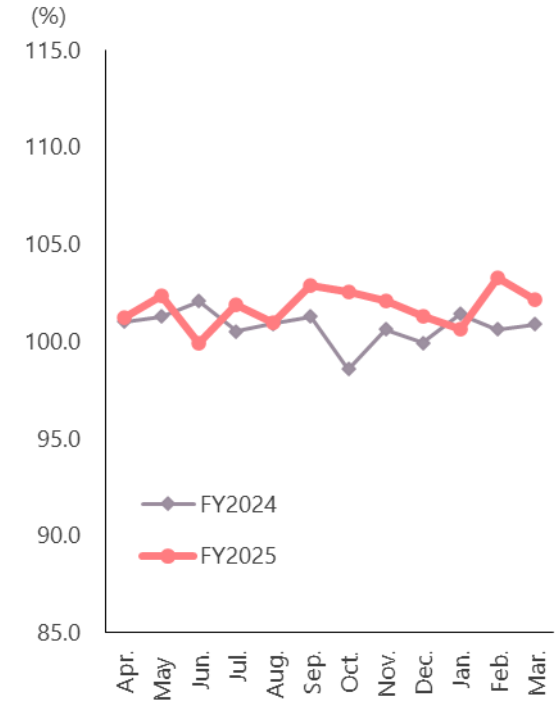
Last year 21.9%

This year 21.6%

YoY -0.2%



Our share

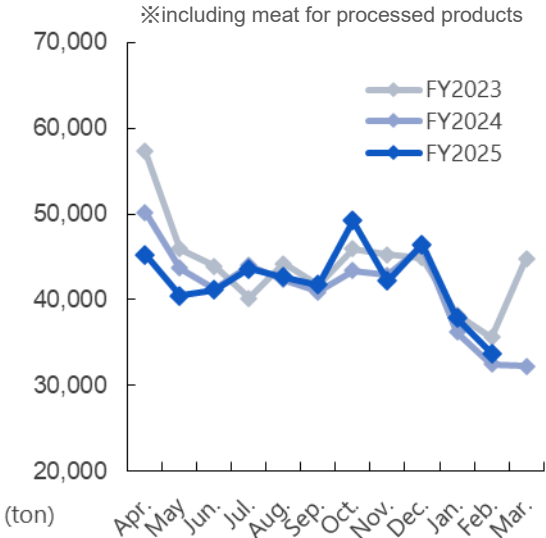
Processed chicken food domestic market
Value per 100 monitors year-on-yearProcessed chicken food domestic market
Average price year-on-year

	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Year
【share】													
FY2024	23.1	21.4	22.5	20.6	21.3	21.0	22.3	23.4	25.6	22.3	21.7	19.8	21.9
FY2025	22.8	23.2	21.4	20.0	20.5	20.0	20.8	21.7	26.6	21.3	21.6	21.2	21.6
【value per 100 monitors year-on-year】													
FY2024	95.8	99.0	95.8	92.7	92.9	97.7	96.9	100.5	100.6	108.7	108.1	100.2	98.9
FY2025	101.2	100.9	104.9	100.9	108.0	102.4	101.6	101.8	101.6	103.8	100.4	102.8	103.7
【Average price year-on-year】													
FY2024	101.0	101.3	102.1	100.5	100.9	101.3	98.6	100.6	99.9	101.4	100.6	100.9	100.8
FY2025	101.2	102.3	99.9	101.9	101.0	102.9	102.6	102.1	101.3	100.6	103.3	102.2	101.8

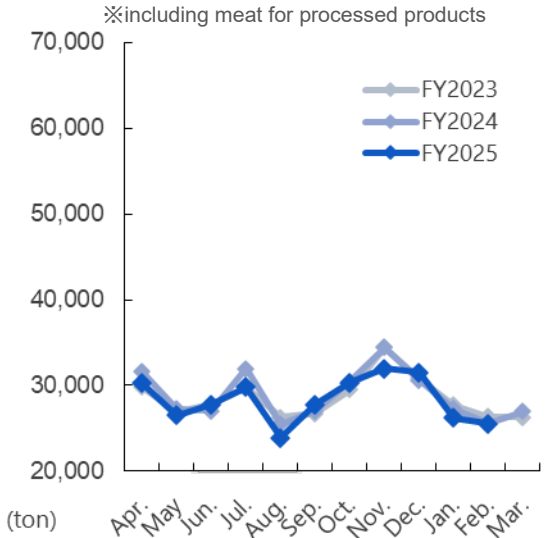
Marketed Volume/
Ending Stock/
Market Price
(Beef)



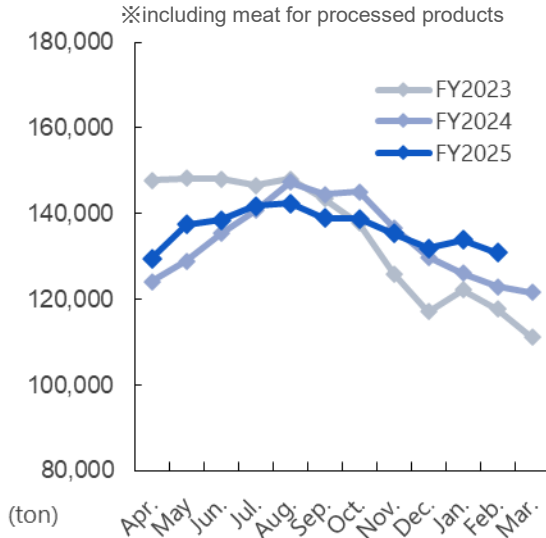
Estimated Marketed Volume
(Imported)



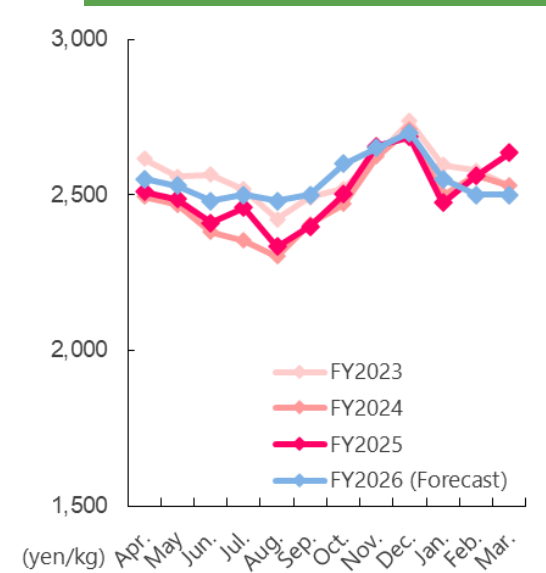
Estimated Marketed Volume
(Domestic)



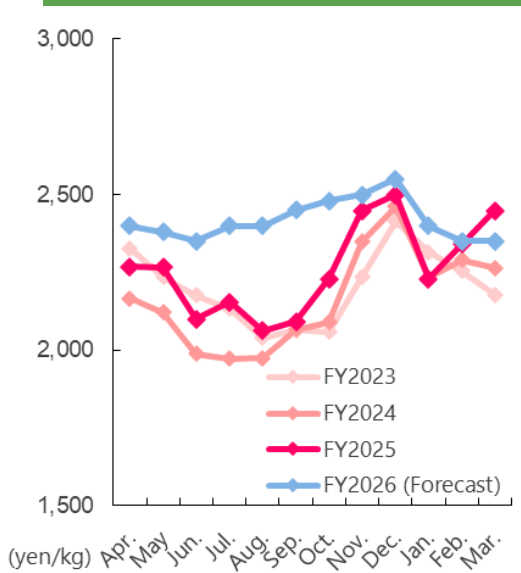
Estimated Ending Stock
(Imported)



Domestic Beef Market Price
(Tokyo Market Wagyu A5, Inc. Tax)



Domestic Beef Market Price
(Tokyo Market Wagyu A4, Inc. Tax)



※including meat for processed products

●Estimated Marketed Volume (Apr.- Feb.)
Total - 0.8 %
Import + 0.2 %
Domestic - 2.3 %

●Feb. Ending inventory (Y on Y)
Import + 6.4 % (+ 7,890 t)

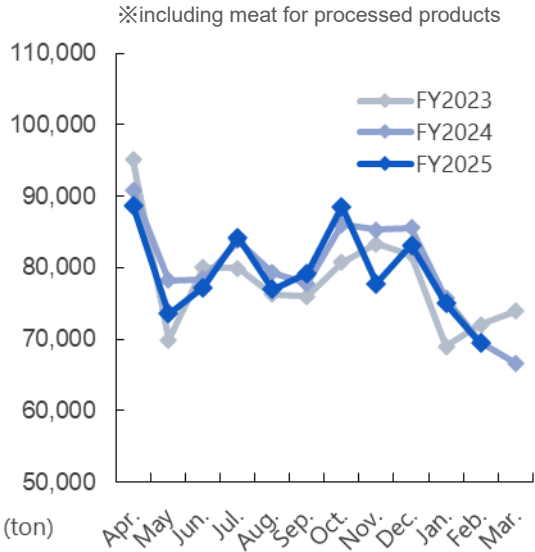
●Market Price
Domestic Beef Prices (Apr.-Mar.)
(Tokyo Market Wagyu A5, Tax Included)
2,509 (+ 26) yen/kg
(Tokyo Market Wagyu A4, Tax Included)
2,262 (+ 97) yen/kg

Data : Ministry of Agriculture, Fishery and Forestry, Ministry of Finance

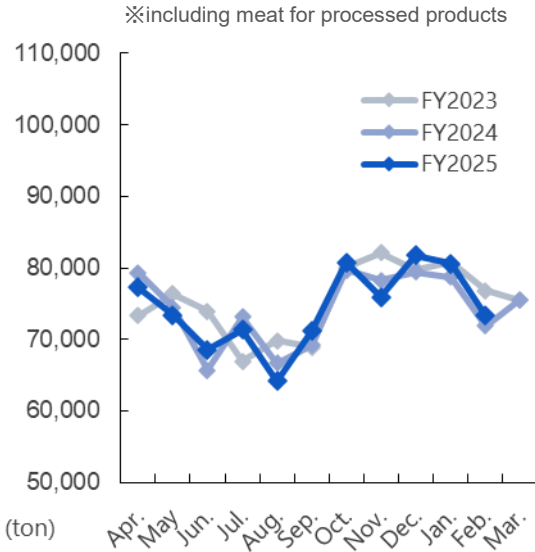
Marketed Volume/
Ending Stock/
Market Price
(Pork)



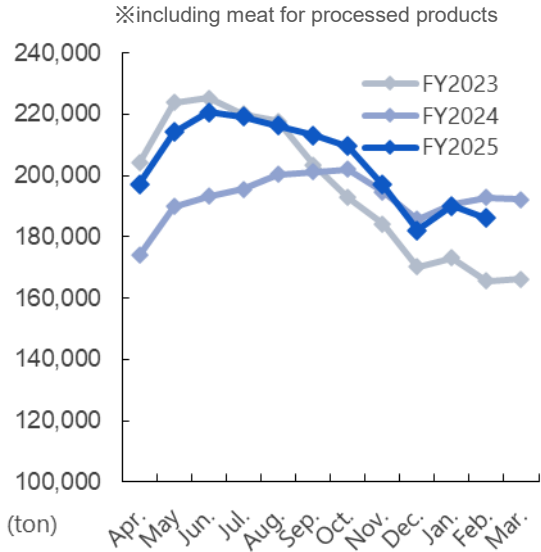
Estimated Marketed Volume
(Imported)



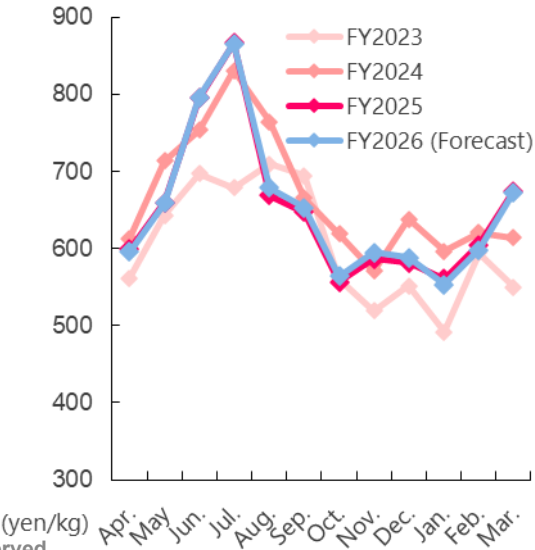
Estimated Marketed Volume
(Domestic)



Estimated Ending Stock
(Imported)



Domestic Pork Carcass Prices
(Tokyo Market EX Grade, Inc. Tax)



※including meat for processed products

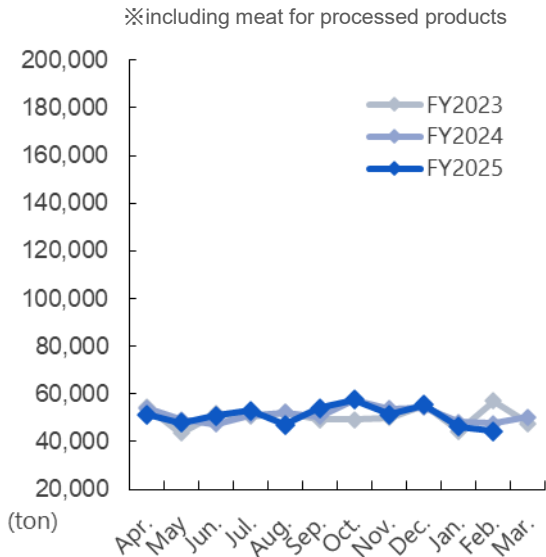
- Estimated Marketed Volume (Apr.- Feb.)
 - Total - 0.9 %
 - Import - 1.9 %
 - Domestic + 0.2 %
- Feb. Ending inventory (Y on Y)
 - Import - 3.4 % (- 6,625 t)
- Market Price
Domestic Pork Carcass Prices (Apr.- Mar.)
(Tokyo Market Excellent Grade, Tax Included) 650 (- 17) yen/kg

Data : Ministry of Agriculture, Fishery and Forestry, Ministry of Finance

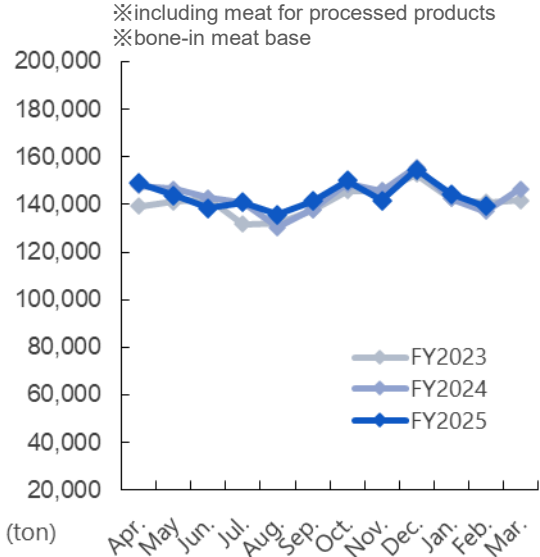
Marketed Volume/
Ending Stock/
Market Price
(Chicken)



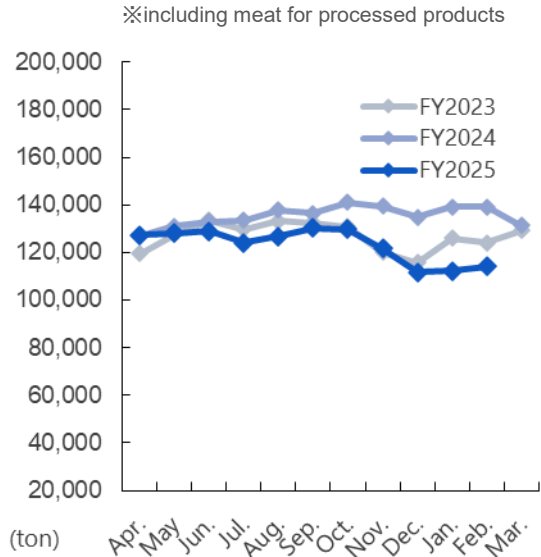
Estimated Marketed Volume
(Imported)



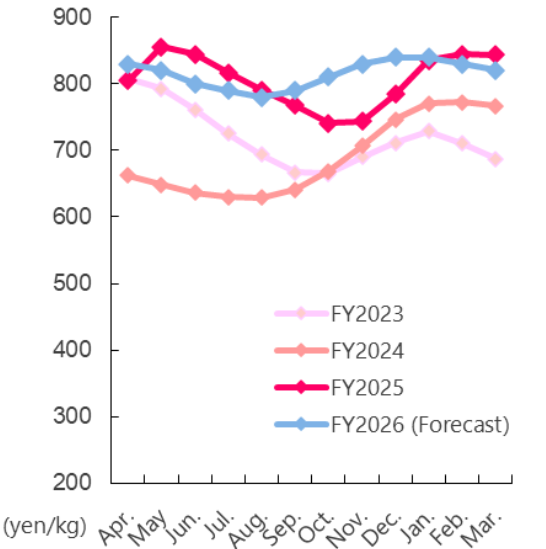
Estimated Marketed Volume
(Domestic)



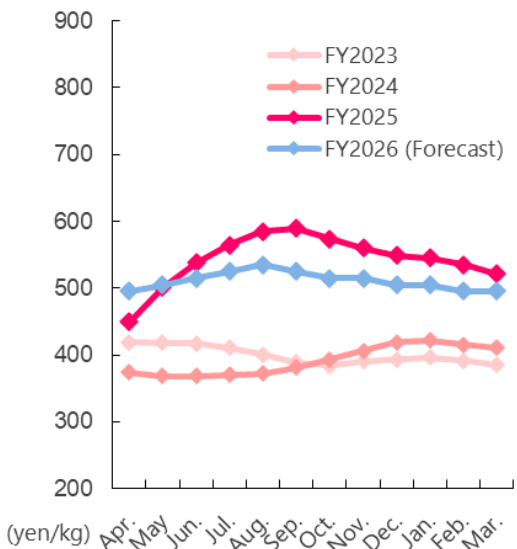
Estimated Ending Stock
(Imported)



Domestic Chicken Market Price
(Tokyo Market Thigh Excl. Tax)



Domestic Chicken Market Price
(Tokyo Market Breast Excl. Tax)



※including meat for processed products

● Estimated Marketed Volume (Apr.-Feb.)	
Total	- 0.2 %
Import	- 1.2 %
Domestic	+ 0.2 %
● Feb. Ending inventory (Y on Y)	
Import	- 18.0 % (- 25,101 t)
● Market Price	
Domestic Chicken Thigh Meat (Apr.-Mar.)	
(Excluding tax)	806 (+ 116) yen/kg
Domestic Chicken Breast Meat (Apr.-Dec.)	
(Excluding tax)	543 (+ 151) yen/kg



**Upcoming
Disclosure**

FY2026 Q1 results
Scheduled Disclosure : Mon, Aug 3, 2026

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