



ITOHAM YONEKYU HOLDINGS INC.
(TSE Prime : 2296)

FY2026 Q1 Financial Results

(Apr 1, 2026 – Jun 30, 2026)

August 03, 2026

**ITOHAM
YONEKYU
HOLDINGS**

Earnings Summary

Q1 Results for FY2026

Consolidated

- ✓ Lower Revenue, Flat Profit (Revenue: JPY281.1B (-5.4%), Ordinary Profit: 9.2B (-0.1%))
Processed Food Div. profit down; Meat Div. profit up in domestic and overseas markets on strong Market Conditions.
Growth in the Meat Div. offset lower profits in Processed Foods Div., keeping consolidated profit flat year on year.

Business Segment

- ✓ **[Processed Food Div.] - Lower Revenue, Lower Profit**
Profit declined as lower sales volumes and higher raw material and logistics costs outweighed price revision-driven gains in selling prices.
- ✓ **[Meat Div.] - Lower Revenue, Higher Profit**
ANZCO increased profit despite lower revenue due to the reactionary impact of the prior-year fiscal year-end change, supported by favorable market conditions. In Japan, imported chicken performed well.

Full-Year Forecast for FY2026

Consolidated

- ✓ Both the H1 and Full-Year forecasts remain unchanged from those announced on May 1, 2026.
(Revenue: JPY 1,040.0B (-2.9%), Ordinary Profit: 28.0B (-7.9%))

Business Segment

- ✓ **[Processed Food Div.] - Higher Revenue, Higher Profit**
We will offset cost increases, including those arising from geopolitical tensions in the Middle East, through price revisions and accelerate product portfolio renewal to get back on track to achieve our plan.
- ✓ **[Meat Div.] - Lower Revenue, Lower Profit**
H2 profit is expected to decline against a high comparison base, reflecting strong imported chicken and ANZCO business performance in the previous year.

FY2026 Q1 Topics

Processed Food Div.

✓ Productivity Improvement

TSUKUSHI FACTORY Closure

March 2026: Tsukushi Factory Closure and Production Consolidation

Number of Items
Reduced Through
the Tsukushi
Factory Closure

- 40 SKU

✓ Product Brand Enhancement

ALT BAYERN Product Renewal

Launched a New TV Commercial to Support the Product Refresh and Drive Consumer Trial



Revenue YoY
(FY2026 Q1)

+10%

あると?

バイエル

Meat Div.

✓ Strengthening Overseas Business

Acquire Greenlea Group Limited



Further Strengthening
Overseas Operations

NZ Beef

Processing Share

15% → **25%**

Expected Synergies

- Leveraging Greenlea's procurement capabilities in NZ's north island
- Leveraging ANZCO's sales network to create added value
- Middle- and Back-office integration

✓ Strengthening Domestic Business

Promoting Wagyu Exports

Towada Beef Plant to Commence Full-Scale Operations in FY2025



Expanding Wagyu Export Sales

Revenue (FY2026 Q1)

1.9 B JPY
(YoY +52.6%)

01 Earnings Results

• **FY2026 Q1 Results** **5**

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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]

FY2026 Q1 Results

Lower Revenue, Lower Profit

Sales : - 5.4%
Ordinary Profit : - 0.1%

FY2026 Q1 results billion yen

	Amount	% of sales	Year-on-Year Change	Change%
Sales	281.1	-	-16.0	-5.4%
Operating profit	9.1	3.3%	+0.0	+0.3%
Ordinary profit	9.2	3.3%	-0.0	-0.1%
Net income	6.1	2.2%	-0.2	-3.9%
EBITDA	12.4	4.4%	-0.3	-2.5%

[Consolidated]

FY2026 Q1 Results

YoY Variance Factors

Processed Food : - 0.9B
Meat : +1.2B



[Processed Food Division]

FY2026 Q1 Results

Lower Revenue, Lower Profit

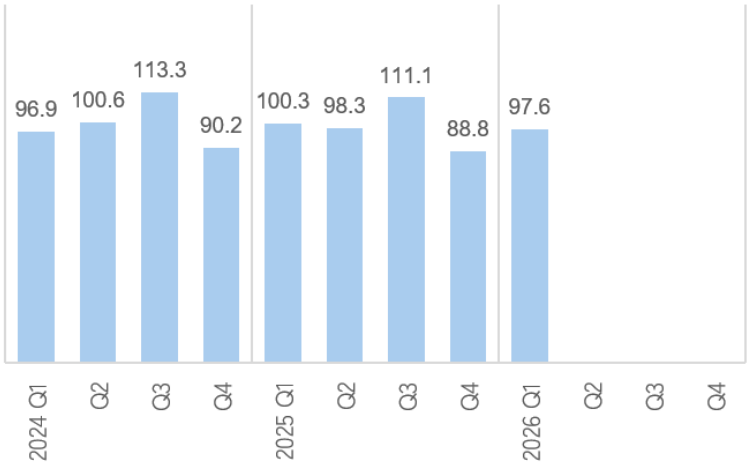
Sales : - 2.7B (- 2.6%)
Ordinary Profit : - 0.9B (- 39.4%)

Segment Info FY2026 Q1 results

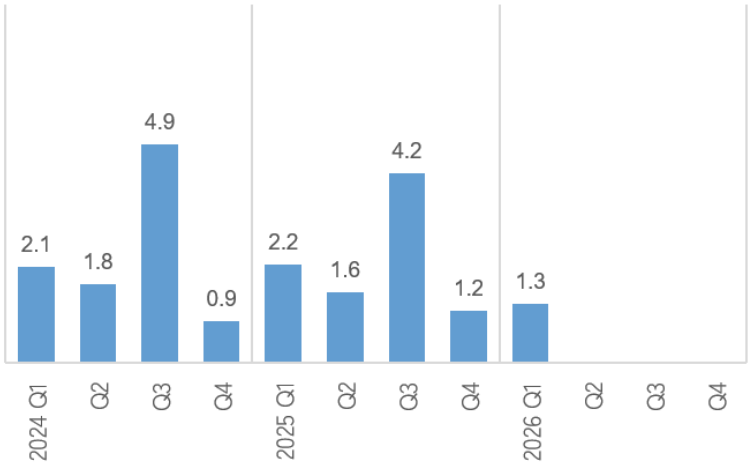
billion yen

	Amount	% of sales	Year-on-Year Change	Change%
Sales	97.6	-	-2.7	-2.6%
Operating profit	1.2	1.2%	-0.9	-41.8%
Ordinary profit	1.3	1.4%	-0.9	-39.4%
EBITDA	2.7	2.7%	-1.1	-29.0%

Sales



Ordinary profit



[Processed Food Division]

FY2026 Q1
Variance Analysis

(Ordinary Profit YoY : - 0.9B)
Internal : + 0.7 B
External : - 1.6 B
Non-operating & Other : ± 0.0 B

- Price revisions and internal improvements offset higher raw material costs, but lower sales volumes and higher logistics costs resulted in lower profit.
- Material cost increases driven by geopolitical tensions in the Middle East are starting to emerge.

Ordinary profit factors

	billion yen
	Q1 results
FY2025 Ordinary profit	2.2
Sales Volume	-0.6
Gross Margin,SG&A	+1.3
Ingredient,utility Costs	-1.1
Logistics cost impact	-0.5
Non-operating income and expenses	-0.0
Others	-0.0
FY2026 Ordinary profit	1.3

Main Factors
[Quantity] - Weak consumer demand continued, resulting in lower sales volumes. (Sales volume YoY) Ham & Sausage : -2.4% Processed Food : -3.8% Total : -3.1%
[Unit price] - Improved profitability through price revisions and internal improvements Ham & sausage : +0.7B Processed food : +0.6B
[Raw materials and utility costs] (YoY) Raw materials : -0.6B Subsidiary materials : -0.6B Utility costs, etc. : +0.1B
[Logistics unit price] - Charter freight rates rose.

01 Earnings Results (FY2026 Q1 Results)

[Processed Food Division]

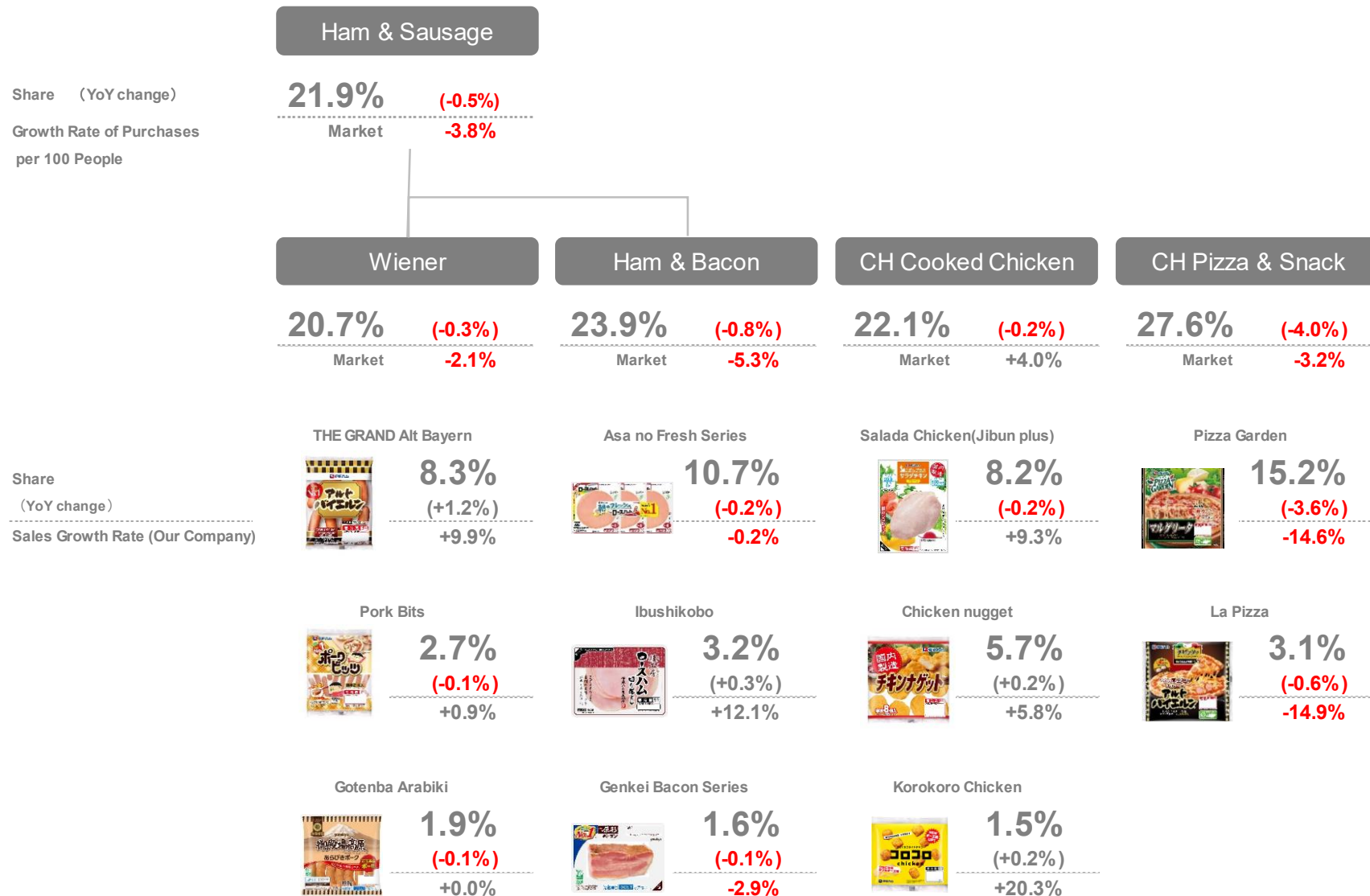
Growth rates by category and product for key household items

Our market share

Our sales growth rate

Market purchase value growth rate

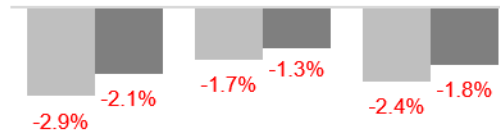
- Continuing promotional activities to further strengthen brand equity.



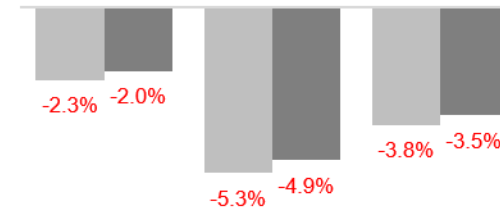
B2C / B2B (volume / amount)
External environment data

- Prepared foods sales lagged market growth, reflecting weak sales of retail pizza and foodservice deli products.

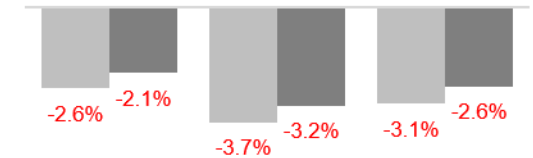
B2C		B2B		Total	
WT	¥	WT	¥	WT	¥



B2C		B2B		Total	
WT	¥	WT	¥	WT	¥

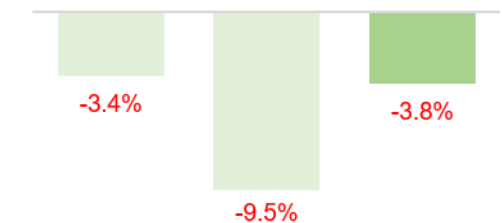


B2C		B2B		Total	
WT	¥	WT	¥	WT	¥



Ham & Sausage

Dom Prod Import Dom Distr



Ham		Sausage		Bacon		Total		Proc F	
WT	¥	WT	¥	WT	¥	WT	¥		¥

Sector	Percentage Change
Wholesale and retail trade	+0.0%
Accommodation and food service activities	+0.3%
Information and communication	+0.3%
Manufacturing	+1.4%
Health and social work	+7.1%
Education	-14.2%
Arts, sports and recreation	-6.2%
Other sectors	-2.1%

[Meat Division]

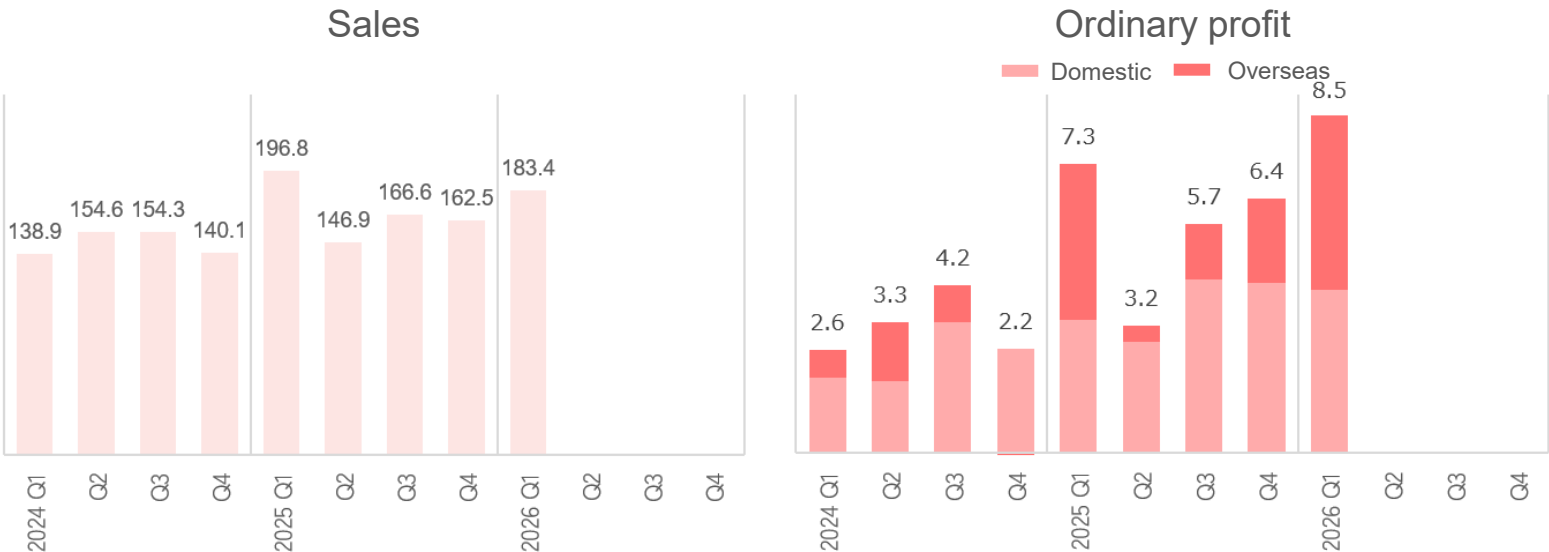
FY2026 Q1 Results

Lower Revenue, Higher Profit

Sales : -13.4B (- 6.8%)
Ordinary Profit : + 1.2B (+17.0%)

Segment Info FY2026 Q1 results billion yen

	Amount	% of sales	Year-on-Year Change	Change%
Sales	183.4	-	-13.4	-6.8%
Operating profit	8.6	4.7%	+1.1	+15.0%
Ordinary profit	8.5	4.6%	+1.2	+17.0%
EBITDA	9.8	5.4%	+1.0	+11.7%



[Meat Division]

FY2026 Q1
Variance Analysis

(Ordinary Profit YoY : +1.2B)
Domestic : + 0.7 B
Overseas : + 0.5 B
Non-operating & Other : + 0.1 B

- Continue rigorous position management.
- Profit increased, supported by solid profitability in the ANZCO business and imported chicken.

Ordinary profit factors

billion yen	
	Q1 results
FY2025 Ordinary profit	7.3
Sales Volume	-0.2
Gross Margin,SG&A	+1.0
Market and feed price (Farm cost)	+0.0
Logistics cost impact	-0.2
Overseas Operation	+0.5
Non-operating income and expenses	+0.1
Others	-0.0
FY2026 Ordinary profit	8.5

Main Factors
[Quantity] - Continue rigorous position management.
[Unit Price] - Imported chicken: Profit increased, supported by strong local market prices and favorable domestic supply-demand conditions. - Domestic beef: Profit declined due to higher Wagyu cattle prices.
[Logistics unit price] - Higher charter costs and warehousing fees
[Overseas business] (ANZCO) - Favorable business conditions continued, supported by higher beef export prices to North America and strong lamb sales in Europe and North America. - Profit increased by 0.8 B, more than offsetting the impact of the prior-year fiscal year-end change (1.1 B in Jan–Mar of the previous year).

[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.-May.)	
		Volume	Amount	Purchase QTY	Expenditure
Beef	Domestic	-6.2	+4.2	+1.5	+6.1
	Imported	+2.7	+11.9		
Pork	Domestic	-2.7	+2.8	+0.7	+4.5
	Imported	-7.5	-4.7		
Poultry	Domestic	+7.4	+11.4	-1.4	+6.4
	Imported	-3.2	+35.0		
Lamb & Others		-8.6	+18.2		

NZ Export Growth

Apr 26-Jun 26(3M)		
	NZ Export Results	
	Volume	Amount
Beef	+17.6	+42.3
Lamb	+11.1	+27.7

*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

Forecast Lower Revenue, Lower Profit

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

• No Changes from the Previous Forecast (Announced on May 1)

FY2026 full year financial earnings forecast

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

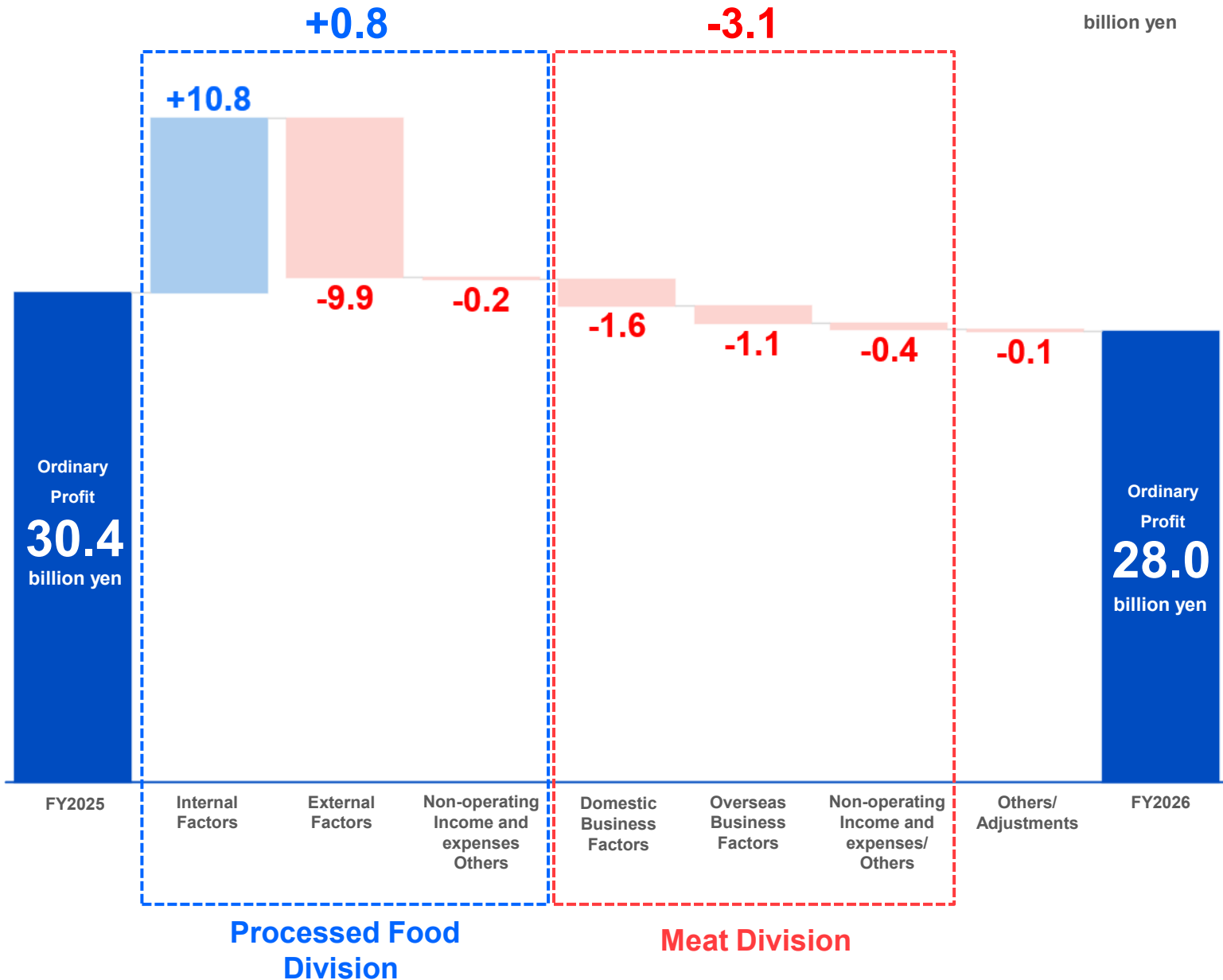
Change%		
ROE (%)	6.2%	▲ 0.8%
ROIC (%)	5.4%	▲ 0.8%

[Consolidated]

FY2026 Full-Year Forecast

YoY Variance Factors

Processed Food : +0.8B
Meat : - 3.1B



[Processed Food Division]

FY2026 Full-Year Forecast

Forecast Higher Revenue, Higher Profit

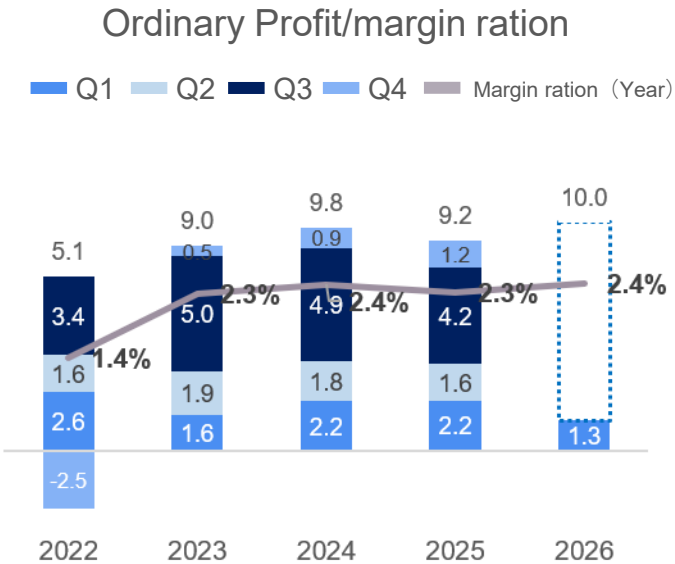
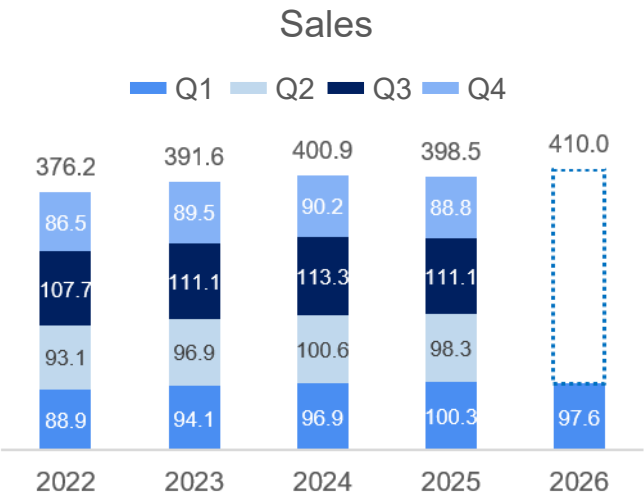
Sales : +11.5B (+ 2.9%)
Ordinary Profit : + 0.8B (+ 8.6%)

- No Changes from the Previous Forecast (Announced on May 1)

Segment Info FY2026 full year financial earnings forecast

billion yen

	Amount	% of sales	Year-on-Year Change	Year-on-Year Change%	Previous forecast Rev 1-May	Change
Sales	410.0	-	+11.5	+2.9%	410.0	-
Operating profit	9.7	2.4%	+1.0	+11.8%	9.7	-
Ordinary profit	10.0	2.4%	+0.8	+8.6%	10.0	-



[Processed Food Division]

Full-Year Forecast for
FY2026 – Variance Analysis

(Ordinary Profit YoY : + 0.8B)
Internal : +10.8 B
External : - 9.9 B
Non-operating & Other : - 0.2 B

- From Q2 onward, sales volumes are expected to remain flat year on year, as a rebound from the prior-year decline is offset by the impact of price revisions.
- Implementing price revisions to offset cost increases, including those arising from geopolitical tensions in the Middle East, while accelerating product portfolio renewal and other profitability improvement initiatives.

Ordinary profit factors

	billion yen			Year change from prev.
	H1 Forecast	H2 Forecast	Year Forecast	
FY2025 Ordinary profit	3.8	5.4	9.2	
Sales Volume	-0.6	-	-0.6	-0.9
Gross Margin,SG&A	+4.3	+7.1	+11.4	+0.4
Ingredient,utility Costs	-2.9	-5.6	-8.5	+0.6
Logistics cost impact	-0.7	-0.8	-1.4	-
Non-operating income and expenses	-0.0	-0.1	-0.1	+0.2
Others	+0.0	-0.1	-0.1	-0.3
FY2026 Ordinary profit	4.0	6.0	10.0	+0.0

Main Factors
[Quantity] - From Q2 onward, sales volumes are expected to remain flat year on year, as a rebound from the prior-year decline is offset by the impact of price revisions.
[Unit price] - Implementing price revisions (effective July 2026) to offset cost increases, including those arising from geopolitical tensions in the Middle East, while accelerating product portfolio renewal and other profitability improvement initiatives.
[Raw materials and utility costs] Raw materials - 4.3B (+0.6B vs. initial) Subsidiary materials - 3.3B (+0.2B vs. initial) Utility costs, etc. - 0.9B (- 0.2B vs. initial)
- Higher Raw Material Costs Due to Rising Pork, Beef and Chicken Prices
- Higher costs for sub. raw materials and utilities due to geopolitical tensions in the Middle East
[Logistics unit price] - Expected increase in charter freight costs.

[Meat Division]

FY2026 Full-Year Forecast

Forecast Lower Revenue, Lower Profit

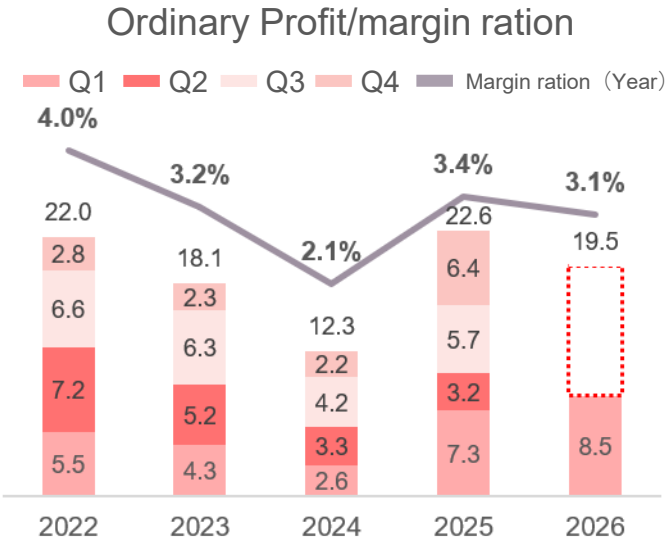
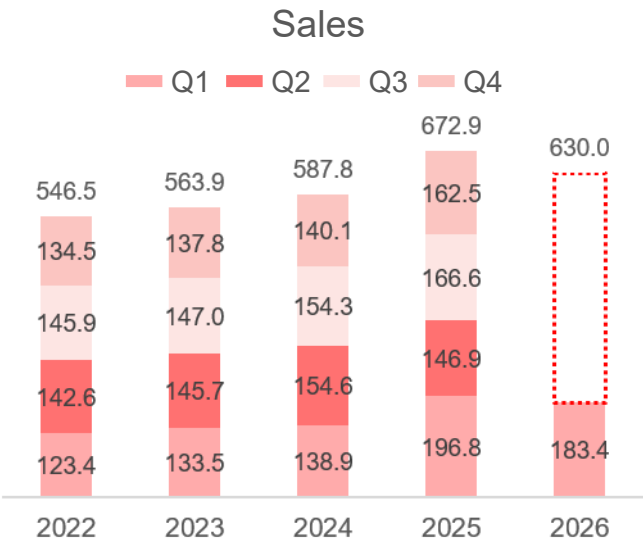
Sales : -42.9B(- 6.4%)
Ordinary profit : - 3.1B(-13.7%)

- No Changes from the Previous Forecast (Announced on May 1)

Segment Info FY2026 full year financial earnings forecast

	Amount	% of sales	Year-on-Year		Previous forecast Rev 1-May	Change
			Change	Change%		
Sales	630.0	-	-42.9	-6.4%	630.0	-
Operating profit	18.5	2.9%	-2.8	-13.3%	18.5	-
Ordinary profit	19.5	3.1%	-3.1	-13.7%	19.5	-

billion yen



[Meat Division]

Full-Year Forecast for
FY2026 – Variance Analysis

(Ordinary Profit YoY : - 3.1B)
Domestic : - 1.6 B
Overseas : - 1.1 B
Non-operating & Other : - 0.4 B

- Both domestic and overseas operations are progressing largely as planned, with H1 ordinary profit expected to be flat year on year.
- H2 profit is expected to decline due to the reactionary impact of the strong performance in imported chicken, domestic farming operations and ANZCO in the previous year (down 3.1 B YoY).

Ordinary profit factors

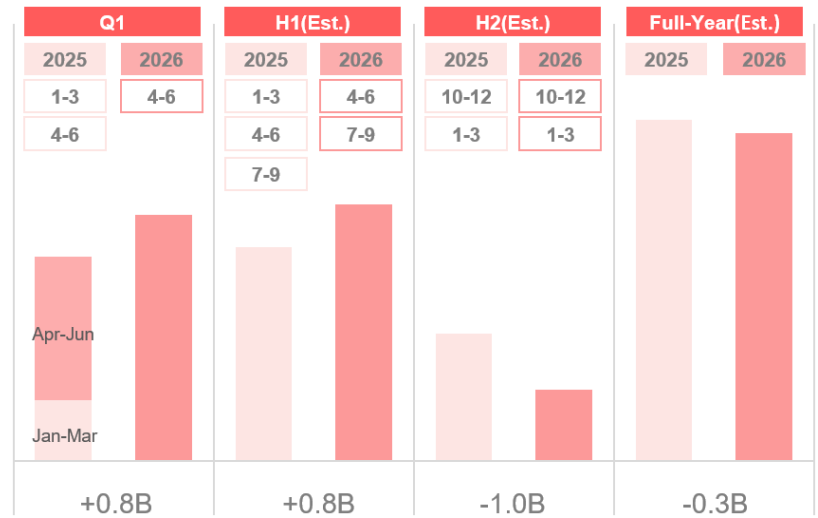
	billion yen			Year change from prev.
	H1 Forecast	H2 Forecast	Year Forecast	
FY2025 Ordinary profit	10.5	12.1	22.6	
Sales Volume	-0.4	-0.2	-0.6	-0.4
Gross Margin,SG&A	+1.2	-0.7	+0.5	-
Market and feed price (Farm cost)	-0.3	-0.3	-0.6	+0.3
Logistics cost impact	-0.6	-0.3	-0.9	-
Overseas Operation	+0.3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

Main Factors
[Quantity] - Continued strict position management.
[Unit price] - Imported Chicken: Profit Expected to Decline on a High Prior-Year Base in H2
[Domestic farming operation] - While domestic chicken prices remain firm, H2 profit is expected to decline due to a high prior-year base and higher feed costs.
[Logistics unit price] - Year-round increase in charter freight costs and warehousing fees.
[Overseas business] (ANZCO) - Sales to key export markets remain strong, but H2 profit is expected to decline on a high prior-year base.

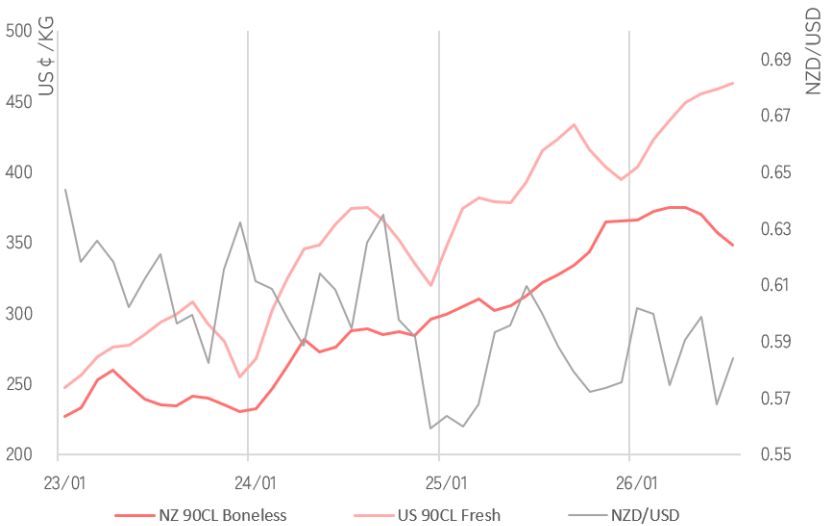
[Meat Division]

Market Trends (ANZCO)

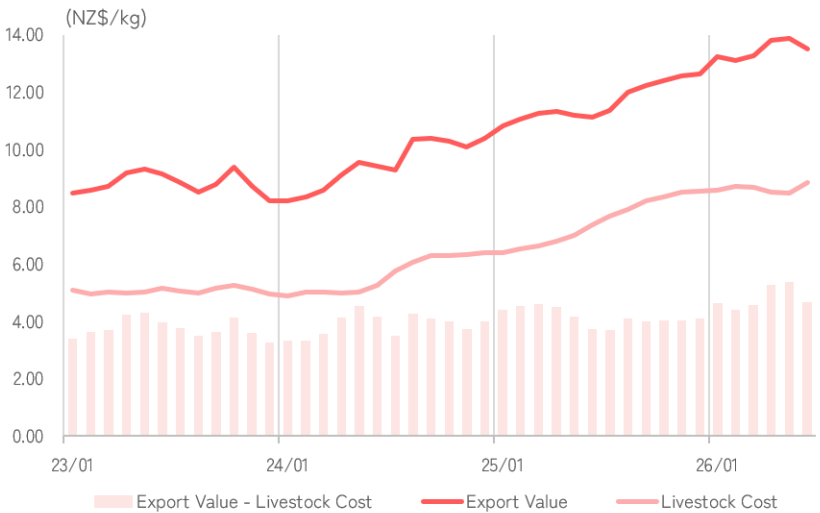
Comparison of the change in accounting period impact
(FY2025: Jan-Dec 2025 + Jan-Mar 2026, FY2026: Apr 2026 - Mar 2027)



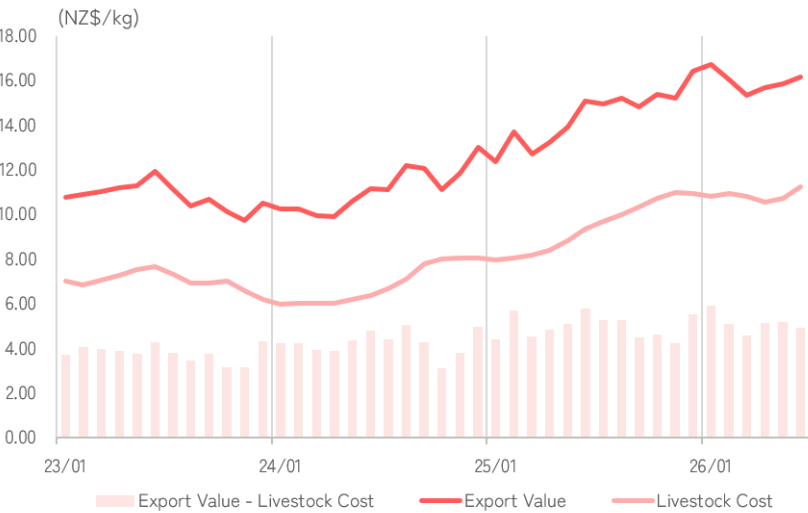
Transition of beef 90CL price : US and imported from NZ



Transition of beef FOB and procurement price in NZ



Transition of lamb FOB and procurement price in NZ

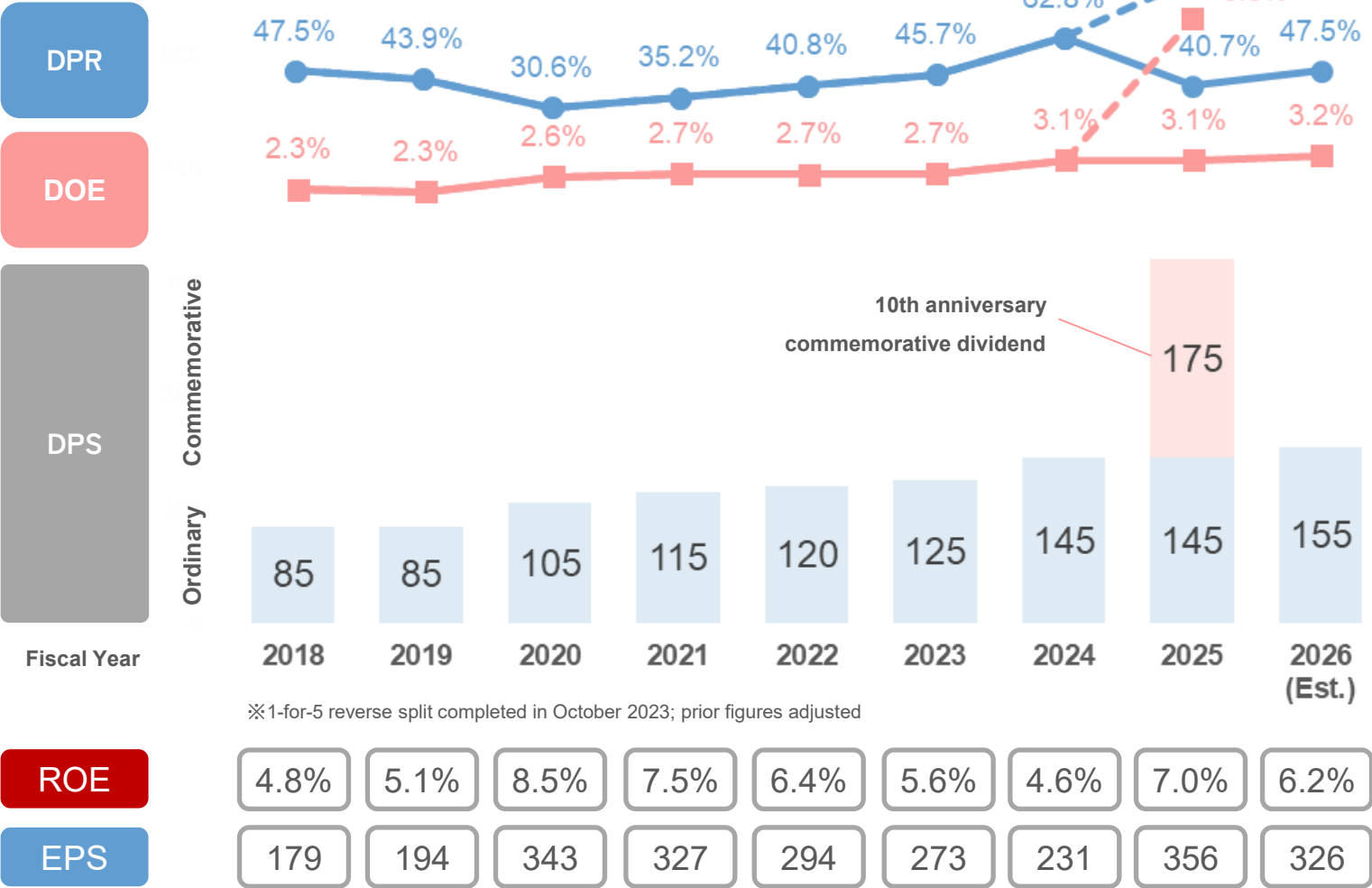


Shareholder Returns

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

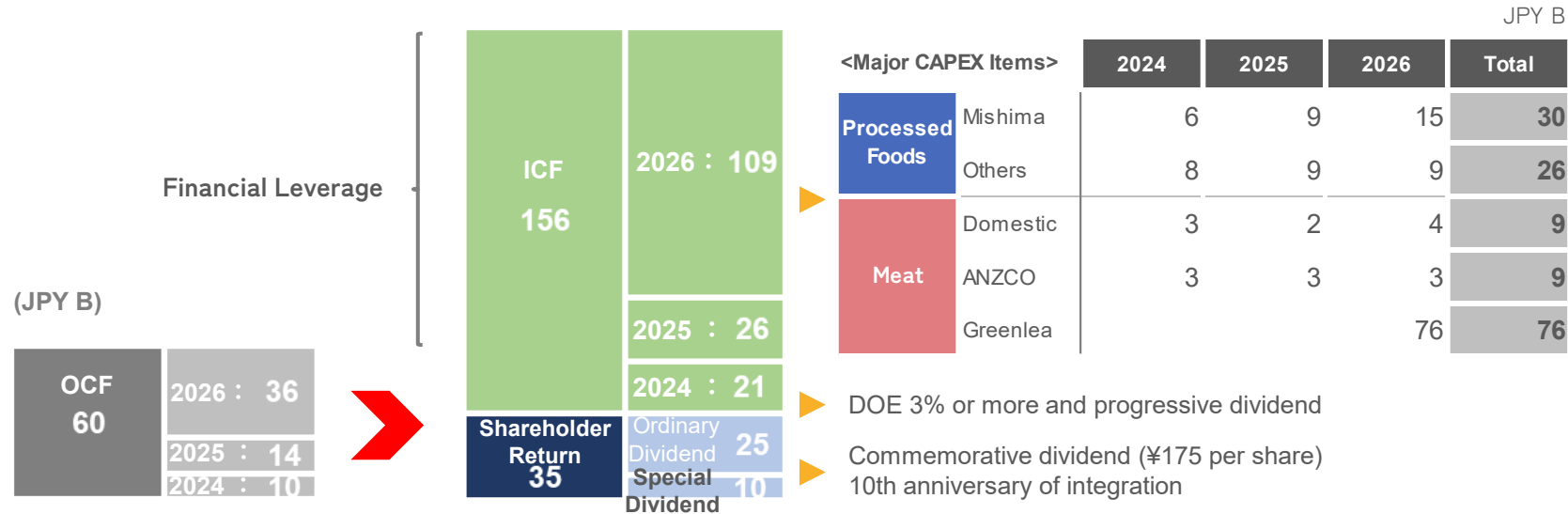
*Incl. commemorative dividend

Capital Allocation

- Leveraging financial leverage to strengthen growth investment and shareholder returns
- Invested capital increased due to plant restructuring and labor-saving investments in the Processed Food Div., as well as higher working capital requirements in the Meat Div.
- Strengthening the earnings base to restore ROE to 8% and ROIC to the 6% range at an early date

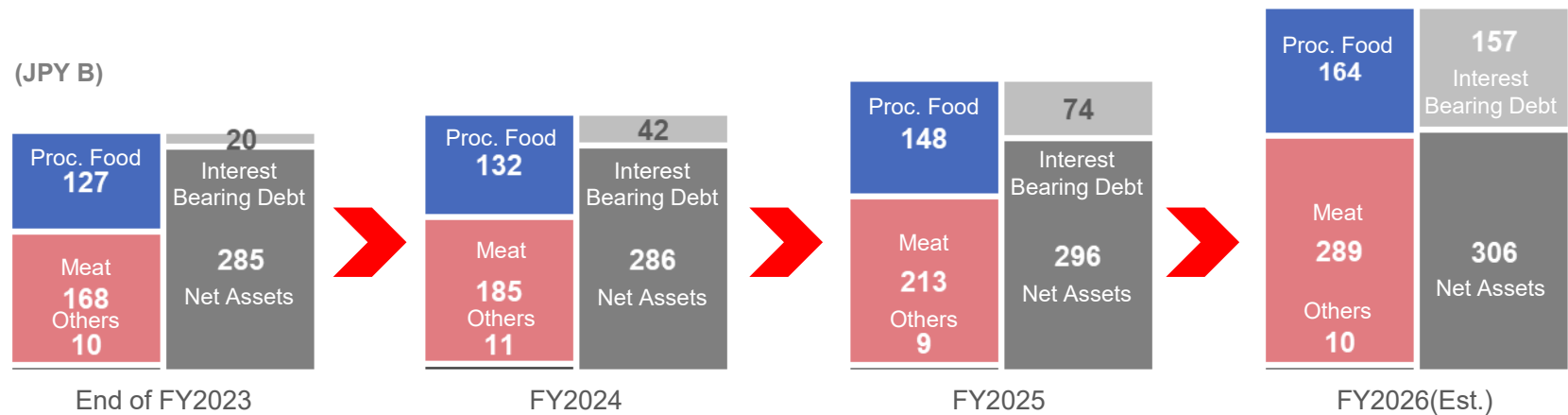
(Reiterated)
Reflects revisions announced with the Greenlea acquisition (June 18, 2026)

Cash Flow Plan (FY2024-FY2026 Cumulative)



Capital Investment Plan (FY2024-2026)

Mid - Long-Term Targets
ROE : 8% or More ROIC : 6% or More



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Income Statement

Results			
	billion yen		
	FY2025	FY2026	
	Q1	Q1	Change
Sales	297.1	281.1	-16.0
COGS	256.6	242.0	-14.6
Gross Profit	40.5	39.0	-1.5
(% of sales)	13.6	13.9	+0.3
Selling, General and Administrative Expenses	31.4	29.9	-1.5
(% of sales)	10.6	10.6	+0.1
Operating profit	9.1	9.1	+0.0
(% of sales)	3.1	3.3	+0.2
Non-operating Gain/Loss	0.0	0.0	-0.0
Ordinary profit	9.2	9.2	-0.0
(% of sales)	3.1	3.3	+0.2
Extra-ordinary Gain/Loss	-0.0	-0.1	-0.1
Income Before Taxes	9.1	9.1	-0.1
Net Income	6.4	6.1	-0.2
(% of sales)	2.1	2.2	+0.1

Sale of each country and region			
	billion yen		
	FY2025	FY2026	
	Q1	Q1	Change
Sales	297.1	281.1	-16.0
Japan	213.8	216.7	+2.9
Overseas Total	83.3	64.4	-19.0
(Overseas ratio%)	28.0	22.9	-5.1
Asia	16.8	14.0	-2.8
North America	31.0	26.2	-4.7
Oceania	18.1	11.8	-6.3
Europe	15.1	11.1	-4.0
others	2.4	1.2	-1.1

SG & A Expenses
Non-operational G/L

SG & A Expenses			
	FY2025	FY2026	
	Q1	Q1	Change
Sales	297.1	281.1	-16.0
Selling, General and Administrative	31.4	29.9	-1.5
% of Sales	10.6	10.6	+0.1
Labor Expenses	10.4	10.0	-0.5
Logistics Expenses	13.3	12.9	-0.4
Advertisement and sales promotion	1.4	1.2	-0.2
Packing	0.3	0.3	+0.0
Depreciation	0.5	0.5	+0.0
Other Expenses	5.6	5.1	-0.5

Non-operational Gain/Loss			
	FY2025	FY2026	
	Q1	Q1	Change
Non-Operational G/L	0.0	0.0	-0.0
Non-controlling interests	0.4	-0.1	-0.5
Financing	-0.7	-0.3	+0.4
Subsidy Income	0.1	0.2	+0.1
Insurance Claim Income	0.0	0.0	-0.0
Others	0.2	0.2	-0.1

Extraordinary Gain/Loss			
	FY2025	FY2026	
	Q1	Q1	Change
Extraordinary G/L	-0.0	-0.1	-0.1
Loss on retirement of non-current assets	-0.0	-0.1	-0.1
Others	0.0	0.0	-0.0

billion yen

549.2 (+24.5)

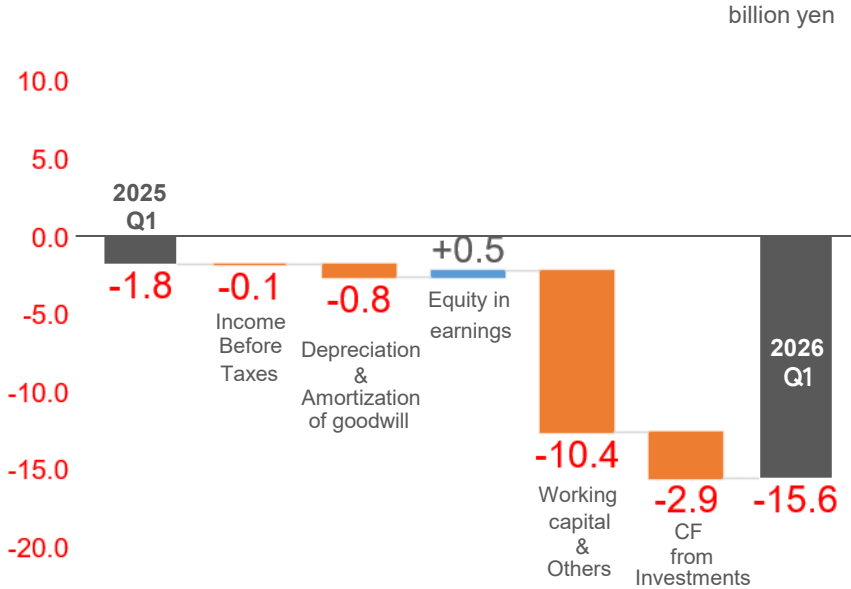
Net Debt with Interes	94.3	(+19.9)
Net D/E Ratio (%)	32.1	(+6.9)
Shareholder's equity	293.8	(-0.9)
Capital to Asset Ratio (%)	53.5	(-2.7)

*Changes are compared with the previous fiscal year-end.

Cash Flow Statement

	billion yen		
	FY2025	FY2026	
	Q1	Q1	Change
① Cash Flow from Operation	4.8	-6.0	-10.9
Income Before Taxes	9.1	9.1	-0.1
Depreciation & Amortization of goodwill	4.2	3.4	-0.8
Change in Receivables	-6.2	-5.7	+0.5
Change in Inventories	-15.1	-13.7	+1.4
Change in Payables	9.6	3.6	-6.0
Others	3.2	-2.6	-5.9
② Cash Flow from Investments	-6.6	-9.5	-2.9
③ Cash Flow from Financing	0.8	14.6	+13.8
④ Ending Cash and Securities	19.2	16.9	-2.3
①+② FCF	-1.8	-15.6	-13.8

Movements in free cash flow



	billion yen	
	FY2026 Q1 results	2.9B (3.7B)
Depreciation		
Capital Expenditure	FY2026 Q1 results	11.4B (3.9B)

※Results in parentheses are for the previous year

		billion yen							
	Consolidated			Processed Food Div.			Meat Div.		
	FY2025	FY2026		FY2025	FY2026		FY2025	FY2026	
	Q1	Q1	change	Q1	Q1	change	Q1	Q1	change
Sales	297.1	281.1	-16.0	100.3	97.6	-2.7	196.8	183.4	-13.4
Ham & Sausage	47.6	46.5	-1.1	43.6	42.8	-0.8	3.9	3.6	-0.3
Regular	47.6	46.5	-1.1	43.6	42.8	-0.8	3.9	3.6	-0.3
Gift	-	-	-	-	-	-	-	-	-
Cooked Foods	42.1	39.1	-3.1	33.8	32.6	-1.2	8.4	6.4	-1.9
Meat	195.0	185.8	-9.2	21.7	21.1	-0.6	173.3	164.7	-8.6
Beef	95.8	88.1	-7.7	9.9	9.7	-0.2	85.9	78.4	-7.5
Pork	49.2	48.5	-0.7	7.0	6.4	-0.6	42.2	42.1	-0.1
Chicken	24.9	29.0	+4.1	4.7	4.9	+0.1	20.2	24.1	+3.9
Lamb & Others	25.1	20.2	-4.9	0.1	0.1	+0.0	25.0	20.1	-4.9
Others	12.4	9.7	-2.6	1.1	1.1	-0.0	11.2	8.6	-2.6

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

		FY2025				FY2026			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Ham & Sausage	Share(%)	22.4	22.6	23.2	21.4	21.9			
	YoY	+0.4	+0.7	+0.6	-0.3	-0.5			
	Sales Growth Rate	+3.7	-0.5	-1.1	+0.2	-2.1			
Wiener	Share(%)	20.9	20.9	20.2	19.6	20.7			
	YoY	+0.3	+0.5	+0.3	-0.4	-0.3			
	Sales Growth Rate	+4.5	-1.7	+0.0	+2.8	-1.9			
The GRAND Alt Bayern	Share(%)	7.1	7.3	7.7	7.0	8.3			
	YoY	+0.3	+1.1	+0.8	+0.7	+1.2			
	Sales Growth Rate	+8.0	+3.6	+8.7	+12.9	+9.9			
Pork Bits	Share(%)	2.7	2.8	2.2	2.5	2.7			
	YoY	+0.3	+0.2	+0.0	+0.1	-0.1			
	Sales Growth Rate	+5.2	+4.0	-1.0	+0.3	+0.9			
Gotenba Arabiki	Share(%)	2.0	2.0	2.0	1.8	1.9			
	YoY	+0.1	+0.3	+0.0	-0.2	-0.1			
	Sales Growth Rate	+4.9	+6.5	+2.3	-5.5	+0.0			
Ham & Bacon	Share(%)	24.7	24.9	26.3	24.6	23.9			
	YoY	+0.6	+1.1	+1.2	+0.3	-0.8			
	Sales Growth Rate	+3.1	+1.4	+1.8	+3.0	-1.1			
Asa no Fresh	Share(%)	10.9	11.1	9.6	10.2	10.7			
	YoY	+0.7	+0.8	+1.1	+0.4	-0.2			
	Sales Growth Rate	+4.1	+4.7	+6.7	+2.1	-0.2			
Ibushikobo	Share(%)	3.0	3.3	2.9	3.2	3.2			
	YoY	+0.3	+0.2	+0.3	+0.3	+0.3			
	Sales Growth Rate	+11.8	+15.0	+9.8	+12.0	+12.1			
Genkei Bacon	Share(%)	1.7	1.5	1.7	2.0	1.6			
	YoY	+0.1	-0.0	-0.0	+0.0	-0.1			
	Sales Growth Rate	+0.9	+1.7	-2.7	-2.3	-2.9			
CH Cooked Chicken	Share(%)	22.3	20.5	22.4	20.8	22.1			
	YoY	+0.1	-0.1	-1.0	+0.1	-0.2			
	Sales Growth Rate	-3.9	-5.9	-4.2	+1.8	+5.7			
Salad Chicken	Share(%)	8.4	8.2	6.7	6.9	8.2			
	YoY	-0.2	+0.1	-0.1	-0.7	-0.2			
	Sales Growth Rate	-7.8	-1.9	+6.4	+10.5	+9.3			
Chicken Nugget	Share(%)	5.5	4.7	5.3	4.7	5.7			
	YoY	+0.5	+0.6	-0.3	+0.2	+0.2			
	Sales Growth Rate	+12.8	+3.3	-4.8	-5.2	+5.8			
CH Pizza & Snack	Share(%)	31.5	34.1	37.2	31.2	27.6			
	YoY	-0.9	+1.7	+0.5	-2.1	-4.0			
	Sales Growth Rate	-6.0	-8.0	+1.4	-3.9	-7.3			
Pizza Garden	Share(%)	18.7	18.9	16.9	15.7	15.2			
	YoY	-1.1	-1.7	+0.0	-2.4	-3.6			
	Sales Growth Rate	-5.4	-14.7	-5.7	-12.1	-14.6			
La Pizza	Share(%)	3.7	3.8	3.2	3.1	3.1			
	YoY	-1.5	-0.2	-0.3	-0.1	-0.6			
	Sales Growth Rate	-22.2	-16.8	+5.0	-11.3	-14.9			

FY2026
Quarterly Results
Details

billion yen

		Q1			Q2			Q3			Q4		
		Apr - Jun			Jul - Sep			Oct - Dec			Jan - Mar		
		FY2025 results	FY2026 results	Change	FY2025 results	FY2026 F'cast	Change	FY2025 results	FY2026 0	Change	FY2025 results	FY2026 0	Change
Consolidated	Sales	297.1	281.1	-16.0	245.3	228.9	-16.3	277.7			251.4		
	Operating profit	9.1	9.1	+0.0	4.0	4.7	+0.6	8.6			6.7		
	Operating profit margin %	3.1	3.3	+0.2	1.6	2.0	+0.4	3.1			2.7		
	Ordinary profit	9.2	9.2	-0.0	4.5	4.8	+0.4	9.7			7.0		
	Ordinary profit margin %	3.1	3.3	+0.2	1.8	2.1	+0.3	3.5			2.8		
Processed Food Div.	Sales	100.3	97.6	-2.7	98.3	107.4	+9.1	111.1			88.8		
	Operating profit	2.1	1.2	-0.9	1.5	2.8	+1.3	4.1			1.0		
	Operating profit margin %	2.1	1.2	-0.8	1.5	2.6	+1.0	3.7			1.1		
	Ordinary profit	2.2	1.3	-0.9	1.6	2.7	+1.1	4.2			1.2		
	Ordinary profit margin %	2.2	1.4	-0.8	1.6	2.5	+0.9	3.8			1.3		
Meat Div.	Sales	196.8	183.4	-13.4	146.9	121.6	-25.4	166.6			162.5		
	Operating profit	7.5	8.6	+1.1	2.9	1.7	-1.2	4.9			6.1		
	Operating profit margin %	3.8	4.7	+0.9	2.0	1.4	-0.6	2.9			3.7		
	Ordinary profit	7.3	8.5	+1.2	3.2	2.0	-1.2	5.7			6.4		
	Ordinary profit margin %	3.7	4.6	+0.9	2.2	1.7	-0.5	3.4			3.9		
Others • Adj	Sales	0.0	0.0	-	0.0	-0.0	-0.0	0.0			0.0		
	Operating profit	-0.4	-0.7	-0.2	-0.3	0.2	+0.6	-0.4			-0.4		
	Ordinary profit	-0.3	-0.7	-0.4	-0.3	0.2	+0.5	-0.3			-0.5		

FY2026
Forecast Details

		billion yen														
		H1					H2					Year				
		FY2025 results	FY2026 F'cast Rev 3-Aug	Change	Last F'cast Rev 1-May	Chage	FY2025 results	FY2026 F'cast Rev 3-Aug	Change	Last F'cast Rev 1-May	Chage	FY2025 results	FY2026 F'cast Rev 3-Aug	Change	Last F'cast Rev 1-May	Chage
Consolidated	Sales	542.4	510.0	-32.4	510.0	-	529.0	530.0	+1.0	530.0	-	1,071.4	1,040.0	-31.4	1,040.0	-
	Operating profit	13.2	13.8	+0.6	13.8	-	15.3	13.2	-2.2	13.2	-	28.5	27.0	-1.5	27.0	-
	Operating profit margin %	2.4	2.7	+0.3	2.7	-	2.9	2.5	-0.4	2.5	-	2.7	2.6	-0.1	2.6	-
	Ordinary profit	13.6	14.0	+0.4	14.0	-	16.8	14.0	-2.8	14.0	-	30.4	28.0	-2.4	28.0	-
	Ordinary profit margin %	2.5	2.7	+0.2	2.7	-	3.2	2.6	-0.5	2.6	-	2.8	2.7	-0.1	2.7	-
Processed Food Div.	Sales	198.6	205.0	+6.4	205.0	-	199.9	205.0	+5.1	205.0	-	398.5	410.0	+11.5	410.0	-
	Operating profit	3.6	4.0	+0.4	4.0	-	5.1	5.8	+0.6	5.8	-	8.7	9.7	+1.0	9.7	-
	Operating profit margin %	1.8	1.9	+0.1	1.9	-	2.6	2.8	+0.2	2.8	-	2.2	2.4	+0.2	2.4	-
	Ordinary profit	3.8	4.0	+0.2	4.0	-	5.4	6.0	+0.6	6.0	-	9.2	10.0	+0.8	10.0	-
	Ordinary profit margin %	1.9	2.0	+0.0	2.0	-	2.7	2.9	+0.2	2.9	-	2.3	2.4	+0.1	2.4	-
Meat Div.	Sales	343.8	305.0	-38.8	305.0	-	329.1	325.0	-4.1	325.0	-	672.9	630.0	-42.9	630.0	-
	Operating profit	10.4	10.3	-0.1	10.3	-	11.0	8.2	-2.8	8.2	-	21.3	18.5	-2.8	18.5	-
	Operating profit margin %	3.0	3.4	+0.4	3.4	-	3.3	2.5	-0.8	2.5	-	3.2	2.9	-0.2	2.9	-
	Ordinary profit	10.5	10.5	+0.0	10.5	-	12.1	9.0	-3.1	9.0	-	22.6	19.5	-3.1	19.5	-
	Ordinary profit margin %	3.0	3.4	+0.4	3.4	-	3.7	2.8	-0.9	2.8	-	3.4	3.1	-0.3	3.1	-
Others • Adj	Sales	0.0	0.0	-0.0	-	-	0.0	0.0	-0.0	-	-	0.0	0.0	-0.0	-	-
	Operating profit	-0.8	-0.5	+0.3	-0.5	-	-0.8	-0.8	-0.0	-0.8	-	-1.6	-1.3	+0.3	-1.3	-
	Ordinary profit	-0.6	-0.5	+0.1	-0.5	-	-0.8	-1.0	-0.2	-1.0	-	-1.4	-1.5	-0.1	-1.5	-

Profit Change
Analysis Trends

billion yen								
Processed Food Div.	Q1	Q2	H1		H2		Year	
	results	F'cast	Rev 1-May.	F'cast	Rev 1-May.	F'cast	Rev 1-May.	F'cast
FY2025 Ordinary profit	2.2	1.6	3.8	3.8	5.4	5.4	9.2	9.2
Sales Volume	-0.6	-	+0.3	-0.6	-	-	+0.3	-0.6
Gross Margin,SG&A	+1.3	+3.0	+3.9	+4.3	+7.1	+7.1	+11.0	+11.4
Ingredient,utility Costs	-1.1	-1.8	-3.2	-2.9	-5.8	-5.6	-9.0	-8.5
Logistics cost impact	-0.5	-0.2	-0.7	-0.7	-0.8	-0.8	-1.4	-1.4
Non-operating income and expenses	-0.0	+0.0	-0.2	-0.0	-0.1	-0.1	-0.3	-0.1
Others	-0.0	+0.0	+0.1	+0.0	+0.1	-0.1	+0.2	-0.1
FY2026 Ordinary profit	1.3	2.7	4.0	4.0	6.0	6.0	10.0	10.0

Meat Div.	Q1	Q2	H1		H2		Year	
	results	F'cast	Rev 1-May.	F'cast	Rev 1-May.	F'cast	Rev 1-May.	F'cast
FY2025 Ordinary profit	7.3	3.2	10.5	10.5	12.1	12.1	22.6	22.6
Sales Volume	-0.2	-0.2	-	-0.4	-0.2	-0.2	-0.2	-0.6
Gross Margin,SG&A	+1.0	+0.2	+1.2	+1.2	-0.7	-0.7	+0.5	+0.5
Market and feed price(Farm cost)	+0.0	-0.3	-0.6	-0.3	-0.3	-0.3	-0.9	-0.6
Logistics cost impact	-0.2	-0.5	-0.6	-0.6	-0.3	-0.3	-0.9	-0.9
Overseas Operation	+0.5	-0.2	+0.3	+0.3	-1.4	-1.4	-1.1	-1.1
Non-operating income and expenses	+0.1	-0.2	-0.3	-0.1	-0.2	-0.2	-0.4	-0.3
Others	-0.0	+0.0	-0.0	-0.0	-0.1	-0.1	-0.1	-0.1
FY2026 Ordinary profit	8.5	2.0	10.5	10.5	9.0	9.0	19.5	19.5

Others・Adj	Q1	Q2	H1		H2		Year	
	results	F'cast	Rev 1-May.	F'cast	Rev 1-May.	F'cast	Rev 1-May.	F'cast
FY2025 Ordinary profit	-0.3	-0.3	-0.6	-0.6	-0.8	-0.8	-1.4	-1.4
Non-operating income and expenses	-0.2	+0.5	+0.4	+0.3	+0.1	-0.0	+0.5	+0.3
Others	-0.1	-0.1	-0.3	-0.2	-0.3	-0.2	-0.6	-0.4
FY2026 Ordinary profit	-0.7	+0.2	-0.5	-0.5	-1.0	-1.0	-1.5	-1.5

01 Earnings Results

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02 Supplemental Data 25

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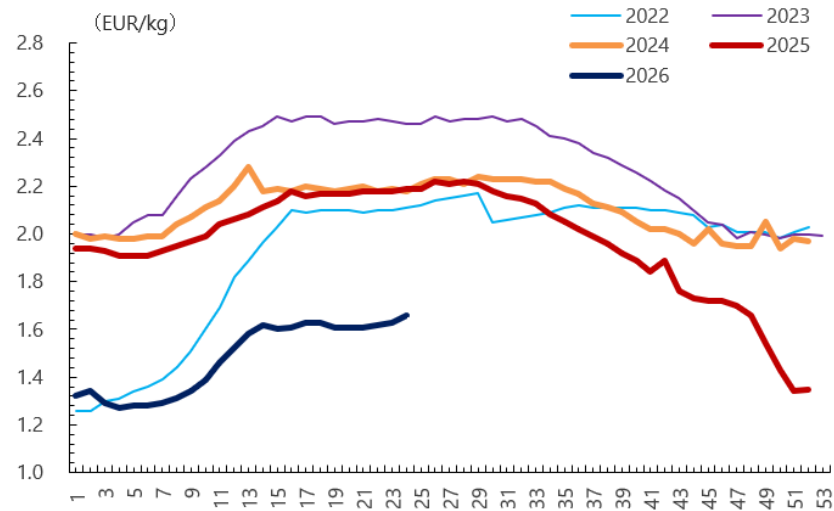
Note:

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.

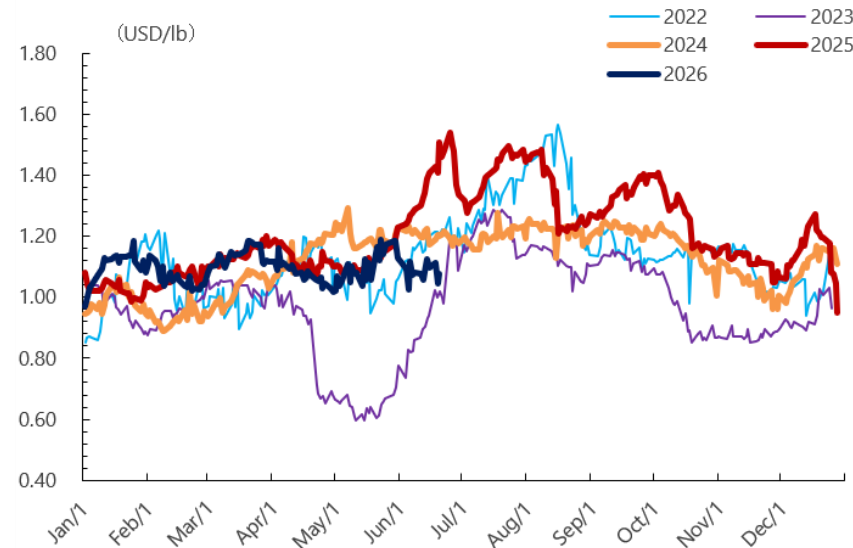
Overseas Markets



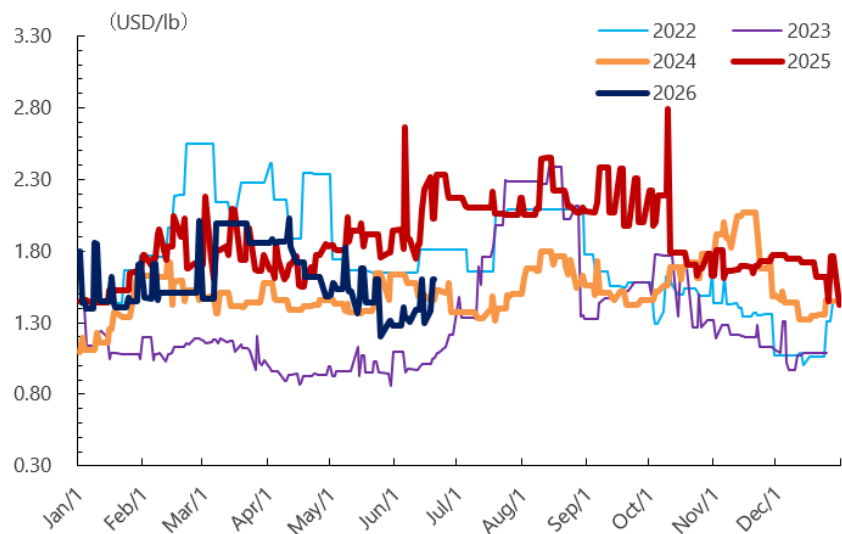
Pork Carcass - Spain



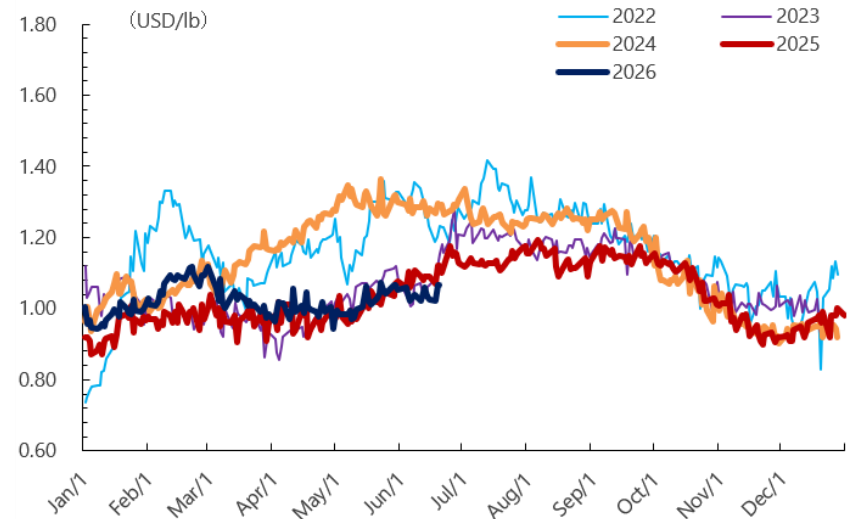
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Pork Bellies - USA



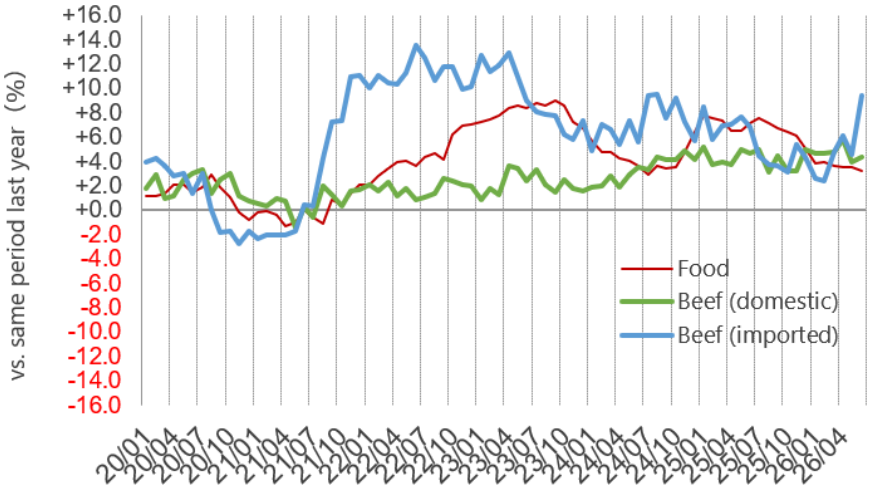
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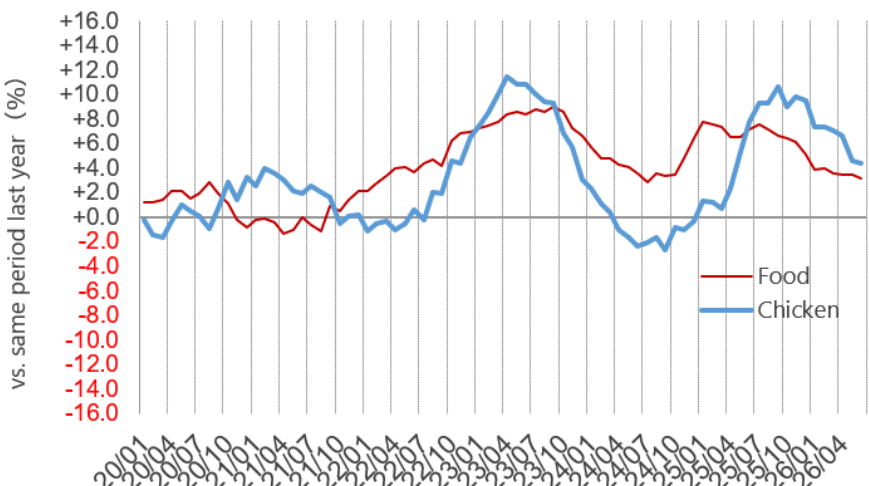
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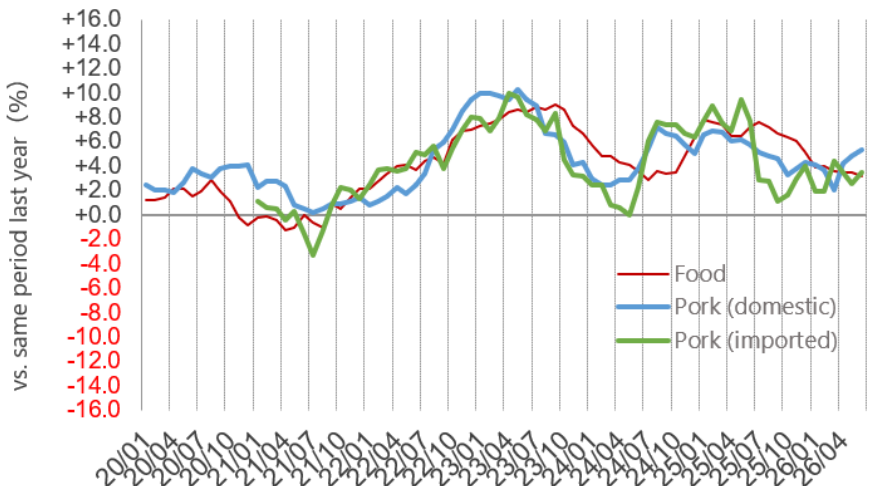
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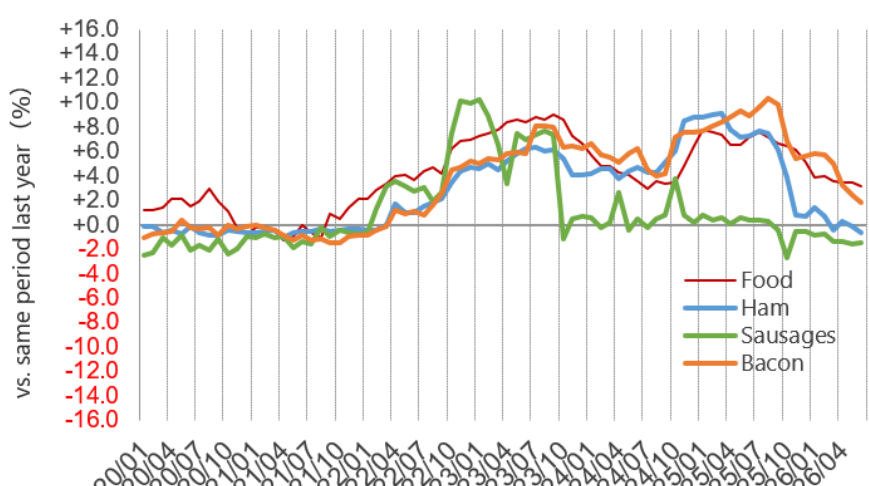
Chicken



Pork



Processed Meat



Ham & Sausage Supply

Apr.-May.

【Domestic】 YoY -3.4%

FY2025 84,487 ton

FY2026 81,590 ton

【Import】 YoY -9.5%

FY2025 5,863 ton

FY2026 5,307 ton

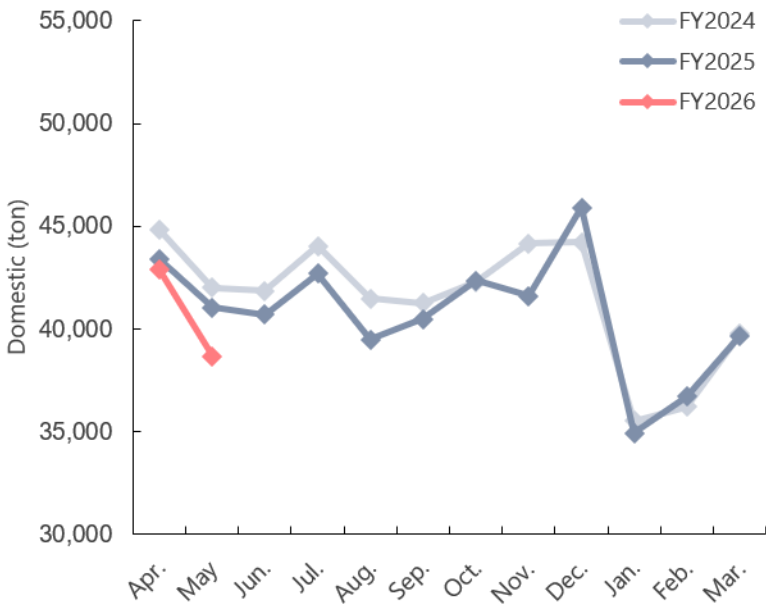
【Total】 YoY -3.8%

FY2025 90,350 ton

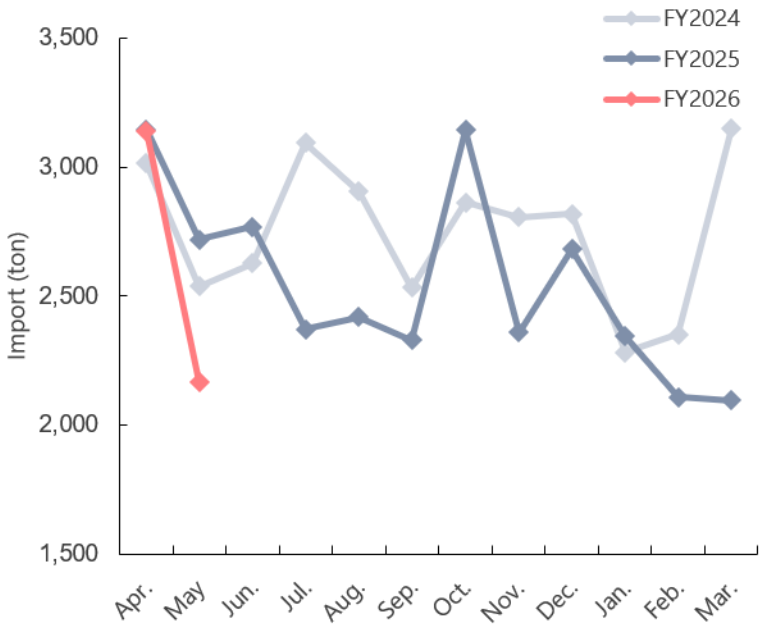
FY2026 86,897 ton



Domestic Production



Imports



			(ton)													
			Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Year	
Domestic	FY2025	Volume	43,426	41,061	40,704	42,687	39,497	40,498	42,361	41,622	45,916	34,930	36,703	39,682	489,086	
		(change%)	-3.2%	-2.3%	-2.8%	-3.1%	-4.8%	-1.8%	0.1%	-5.8%	3.8%	-1.7%	1.4%	-0.2%	-1.7%	
	FY2026	Volume	42,912	38,679											81,590	
		(change%)	-1.2%	-5.8%											-3.4%	
Import	FY2025	Volume	3,144	2,719	2,767	2,370	2,419	2,328	3,143	2,358	2,680	2,344	2,107	2,096	30,475	
		(change%)	4.3%	7.1%	5.4%	-23.4%	-16.7%	-8.1%	9.8%	-16.0%	-4.8%	2.7%	-10.4%	-33.5%	-7.6%	
	FY2026	Volume	3,141	2,166											5,307	
		(change%)	-0.1%	-20.3%											-9.5%	
Total	FY2025	Volume	46,571	43,780	43,472	45,057	41,915	42,826	45,503	43,980	48,597	37,274	38,810	41,778	519,561	
		(change%)	-2.7%	-1.7%	-2.3%	-4.4%	-5.6%	-2.2%	0.7%	-6.4%	3.3%	-1.4%	0.7%	-2.8%	-2.1%	
	FY2026	Volume	46,052	40,845											86,897	
		(change%)	-1.1%	-6.7%											-3.8%	

03 Appendix

Ham/Sausage Domestic Market Share

【 Share 】

Apr.-Jun.

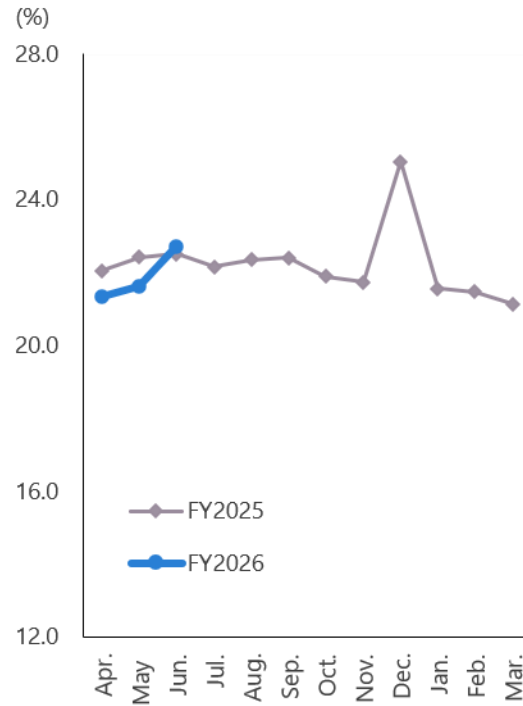
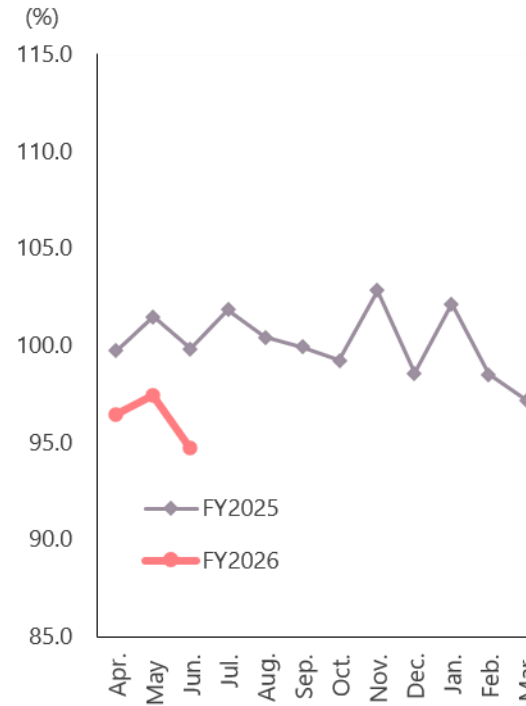
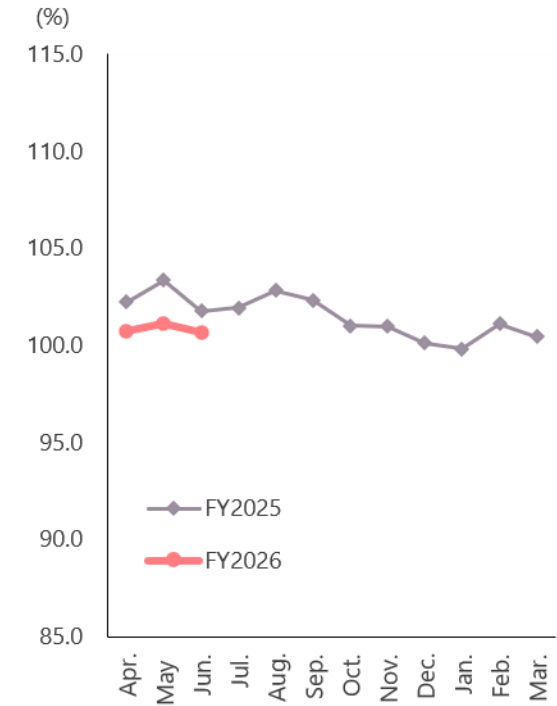
Last year 22.4%

This year 21.9%

YoY - 0.5%



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】													
FY2025	22.0	22.4	22.5	22.2	22.3	22.4	21.9	21.7	25.1	21.6	21.5	21.1	22.4
FY2026	21.3	21.6	22.7										21.9
【value per 100 monitors year-on-year】													
FY2025	99.7	101.5	99.8	101.8	100.4	99.9	99.2	102.8	98.6	102.1	98.5	97.2	100.1
FY2026	96.5	97.5	94.7										96.2
【Average price year-on-year】													
FY2025	102.2	103.3	101.8	101.9	102.8	102.3	101.0	101.0	100.1	99.8	101.1	100.4	101.4
FY2026	100.7	101.1	100.6										100.8

03 Appendix

Wiener Domestic Market Share

【 Share 】

Apr.-Jun.

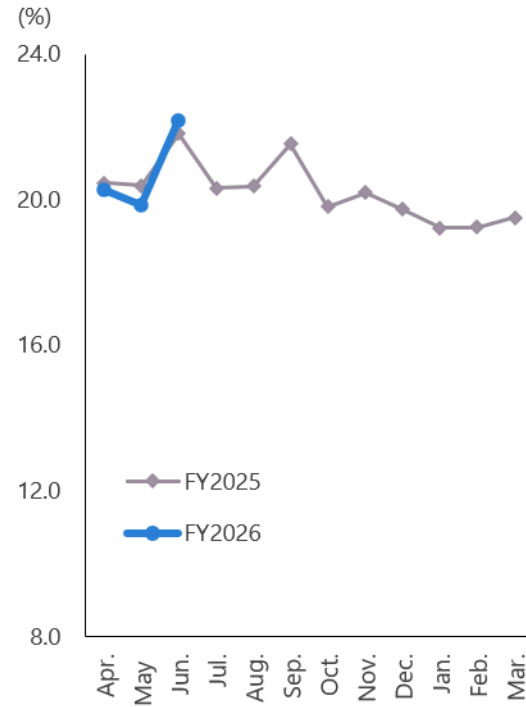
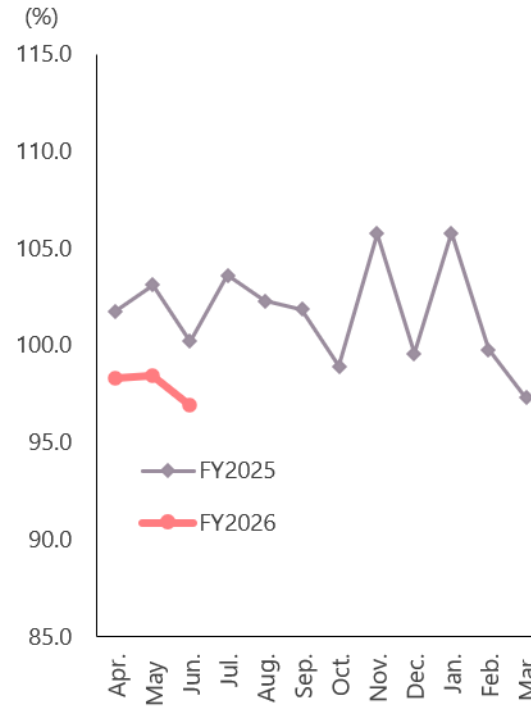
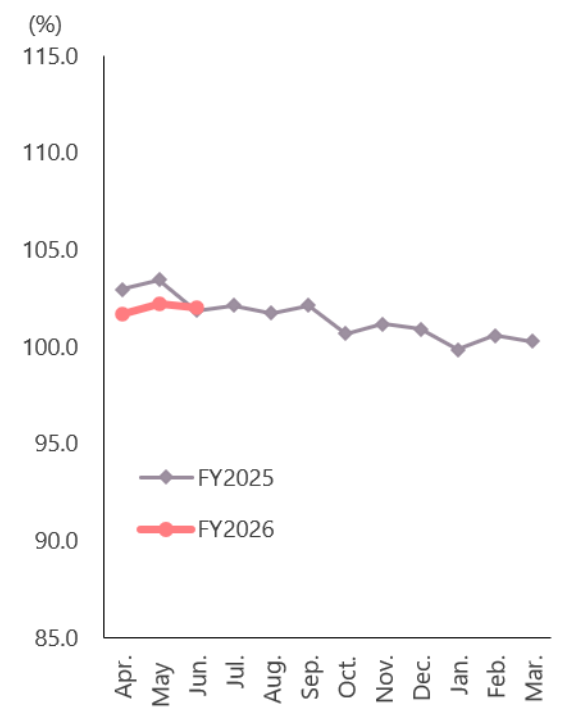
Last year 20.9%

This year 20.7%

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】													
FY2025	20.5	20.4	21.8	20.3	20.4	21.5	19.8	20.2	19.7	19.2	19.2	19.5	20.3
FY2026	20.3	19.8	22.2										20.7
【value per 100 monitors year-on-year】													
FY2025	101.8	103.1	100.2	103.6	102.3	101.9	98.9	105.8	99.6	105.8	99.8	97.3	101.4
FY2026	98.3	98.4	96.9										97.9
【Average price year-on-year】													
FY2025	103.0	103.5	101.9	102.1	101.7	102.2	100.7	101.2	100.9	99.9	100.6	100.3	101.3
FY2026	101.7	102.2	102.0										102.0

03 Appendix

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

【 Share 】

Apr.-Jun.

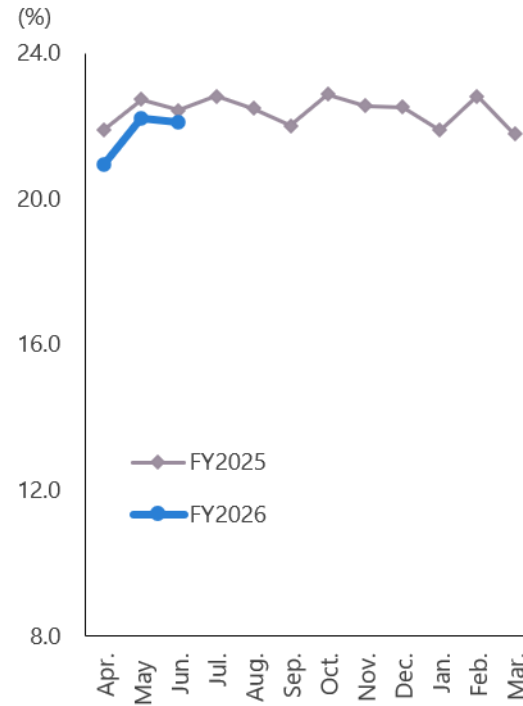
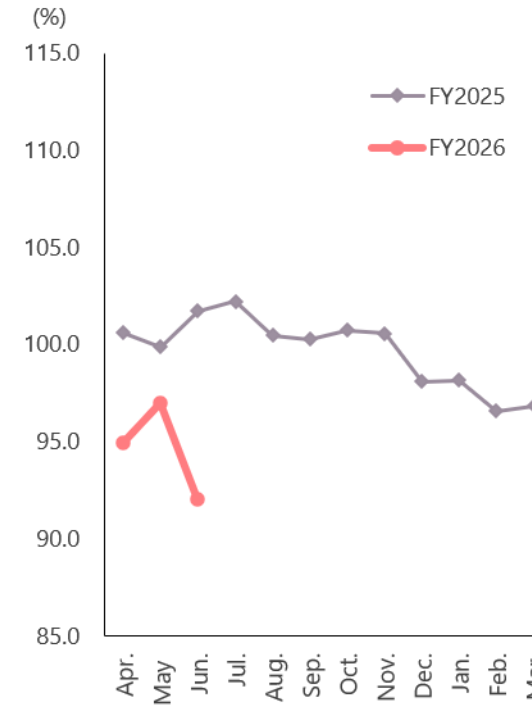
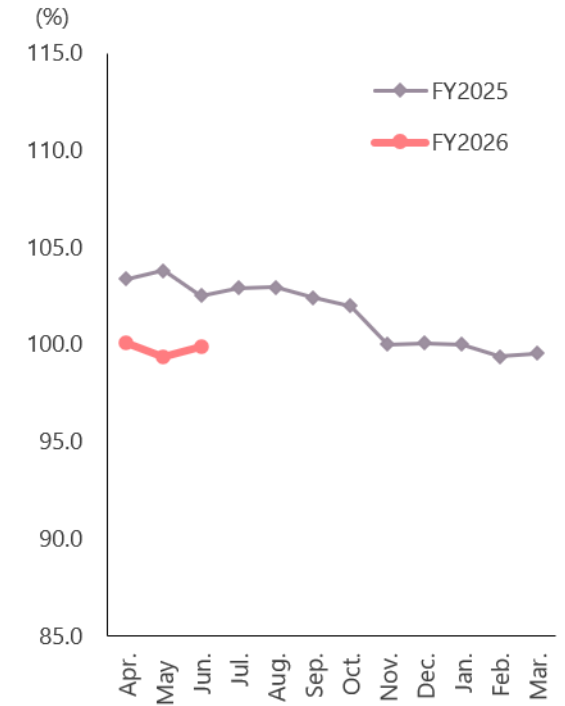
Last year 22.4%

This year 21.9%

YoY -0.6%



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】													
FY2025	21.9	22.7	22.4	22.8	22.5	22.0	22.9	22.5	22.5	21.9	22.8	21.8	22.4
FY2026	21.0	22.2	22.1										21.8
【value per 100 monitors year-on-year】													
FY2025	100.6	99.9	101.7	102.2	100.5	100.3	100.7	100.6	98.1	98.2	96.6	96.8	100.0
FY2026	94.9	97.0	92.0										94.6
【Average price year-on-year】													
FY2025	103.4	103.8	102.5	102.9	103.0	102.4	102.0	100.0	100.1	100.0	99.4	99.6	101.7
FY2026	100.1	99.4	99.9										99.8

03 Appendix

Pizza/Snacks Domestic Market Share

【 Share 】

Apr.-Jun.

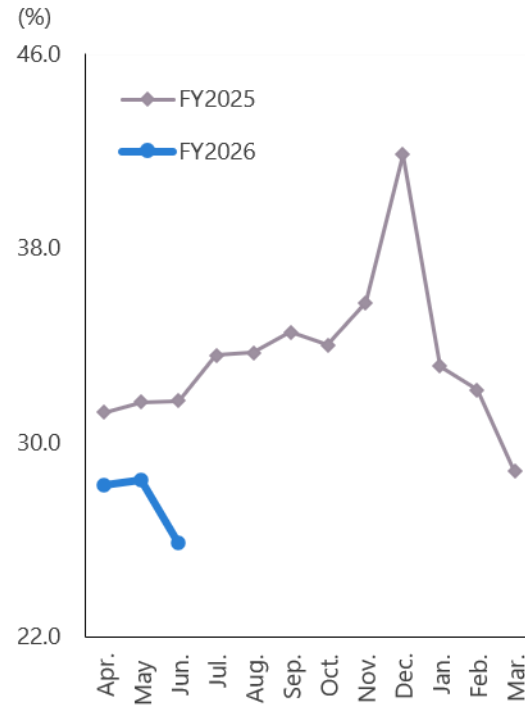
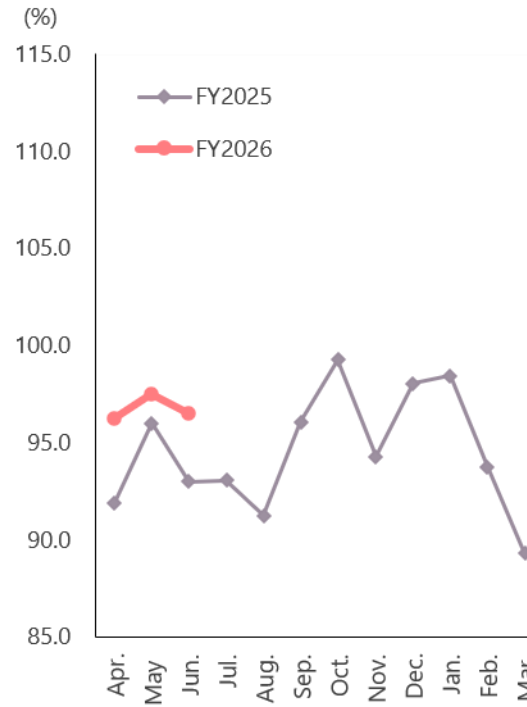
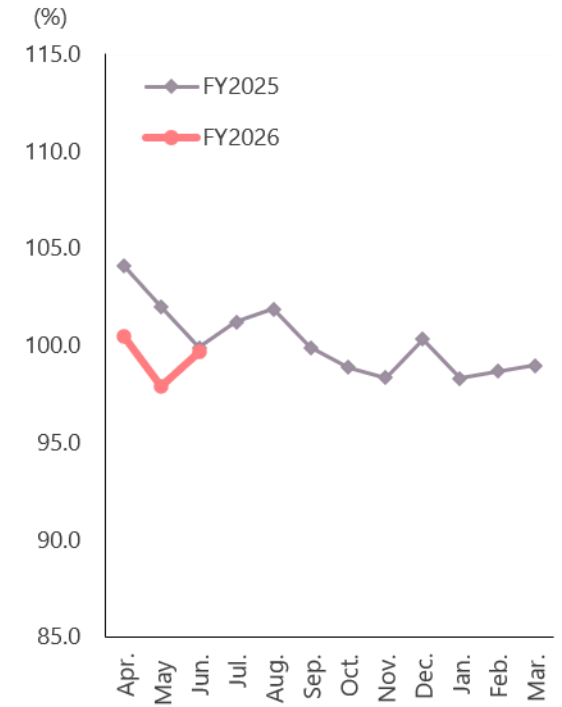
Last year 31.5%

This year 27.6%

YoY - 4.0%



Our share

Pizza/Snacks domestic market
Value per 100 monitors year-on-yearPizza/Snacks domestic market
Average price year-on-year

	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Year
【share】													
FY2025	31.3	31.7	31.7	33.6	33.7	34.5	34.0	35.8	41.9	33.1	32.2	28.8	33.6
FY2026	28.2	28.4	25.9										27.6
【value per 100 monitors year-on-year】													
FY2025	91.9	96.0	93.0	93.1	91.2	96.1	99.3	94.3	98.0	98.4	93.8	89.3	94.7
FY2026	96.3	97.5	96.5										96.8
【Average price year-on-year】													
FY2025	104.1	102.0	99.9	101.2	101.9	99.9	98.9	98.4	100.3	98.3	98.7	99.0	100.3
FY2026	100.5	97.9	99.7										99.2

03 Appendix

Hamburger steak/ Meatball Domestic Market Share

【 Share 】

Apr.-Jun.

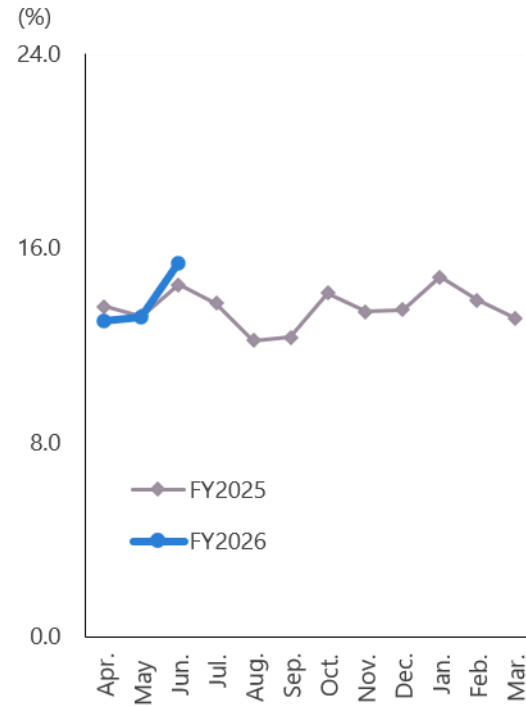
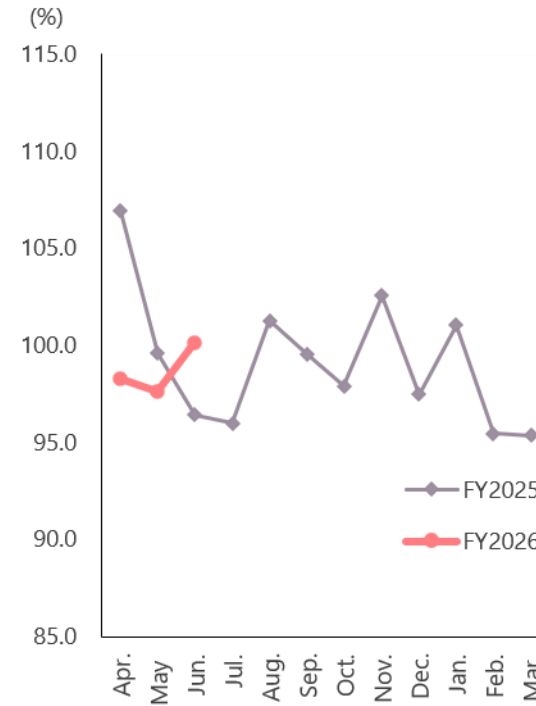
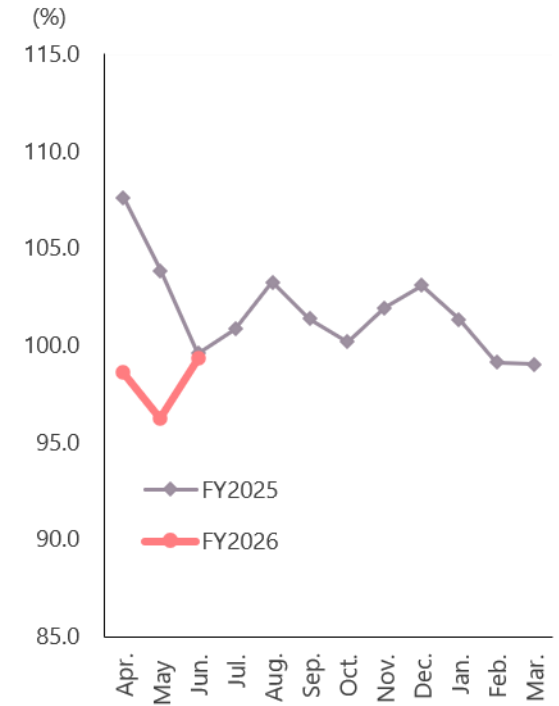
Last year 13.8%

This year 13.8%

YoY + 0.1%



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】													
FY2025	13.6	13.2	14.5	13.7	12.2	12.3	14.2	13.4	13.5	14.8	13.9	13.1	13.5
FY2026	13.0	13.1	15.4										13.8
【value per 100 monitors year-on-year】													
FY2025	106.9	99.6	96.4	96.0	101.3	99.6	97.9	102.6	97.5	101.0	95.5	95.4	99.6
FY2026	98.3	97.6	100.2										98.4
【Average price year-on-year】													
FY2025	107.6	103.8	99.6	100.9	103.3	101.4	100.2	101.9	103.1	101.3	99.1	99.0	101.7
FY2026	98.6	96.3	99.3										98.0

03 Appendix

Processed Chicken Food Domestic Market Share

【 Share 】

Apr.-Jun.

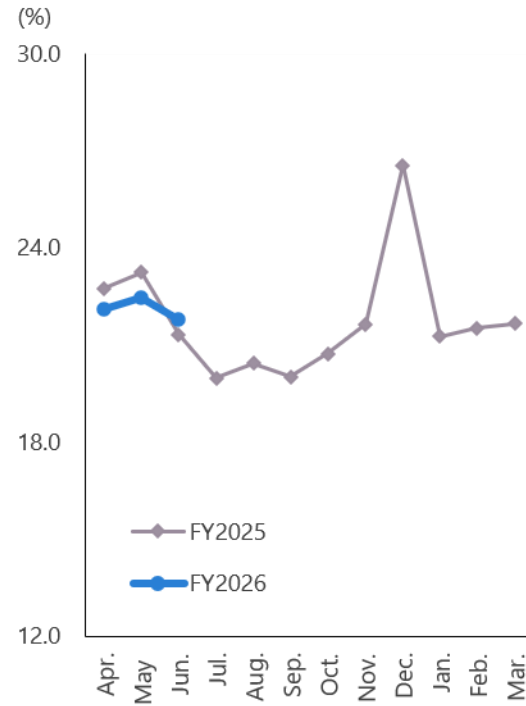
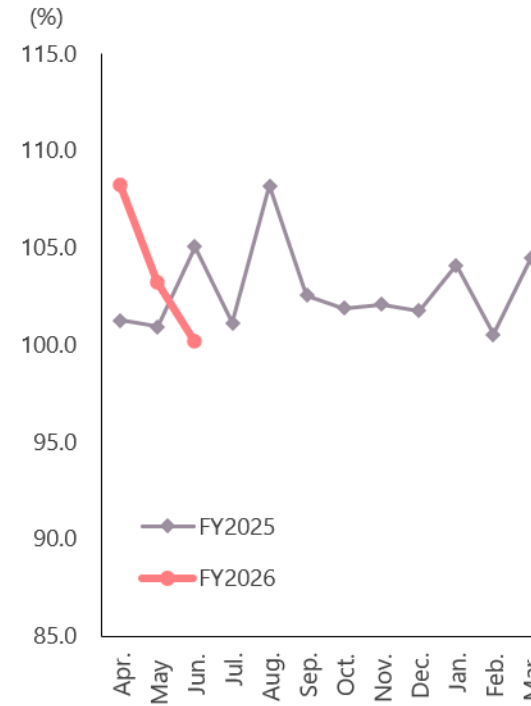
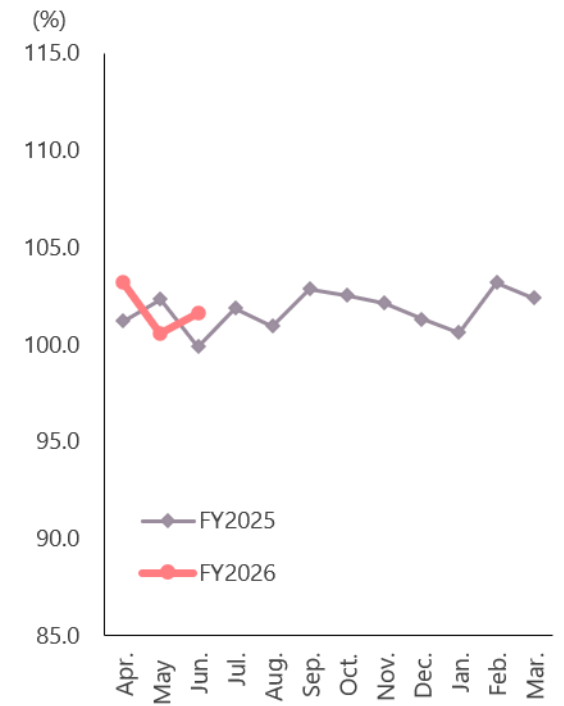
Last year 22.3%

This year 22.1%

YoY -0.2%

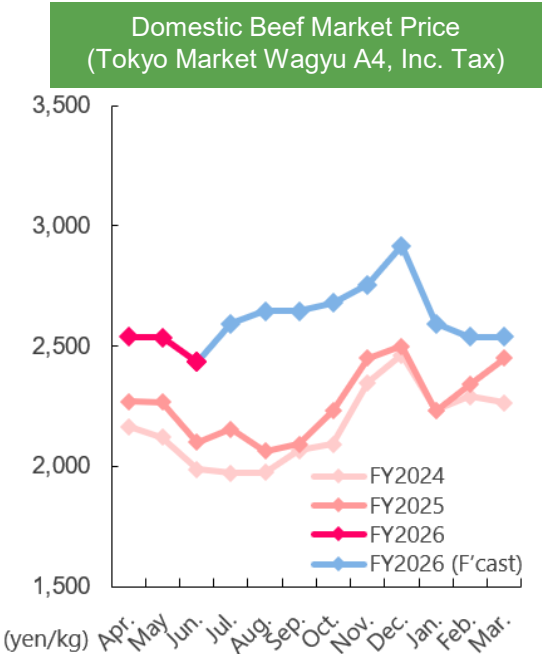
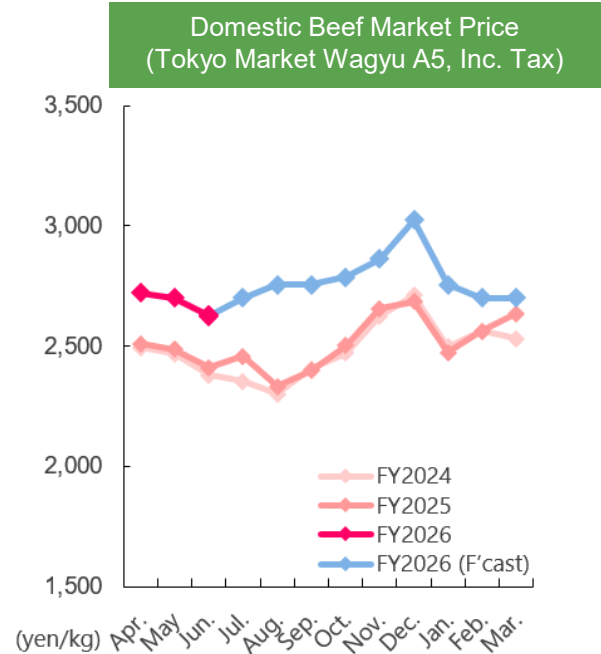
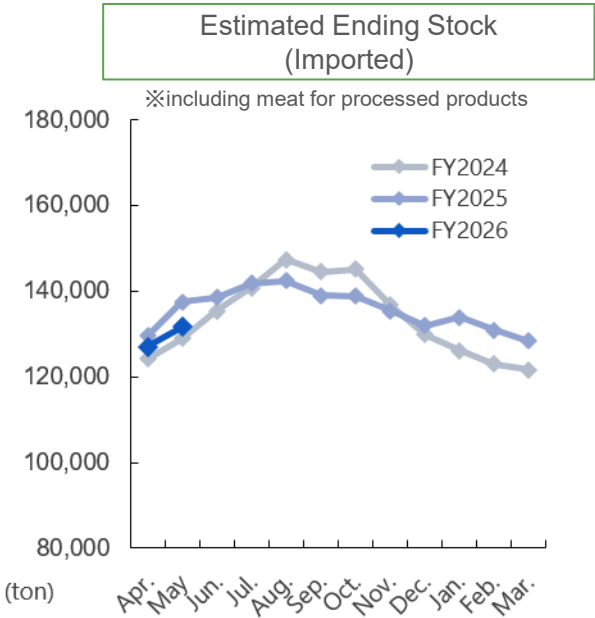
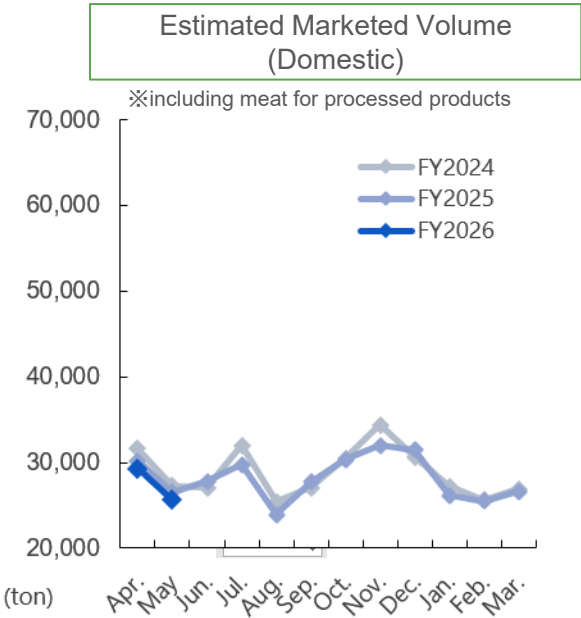
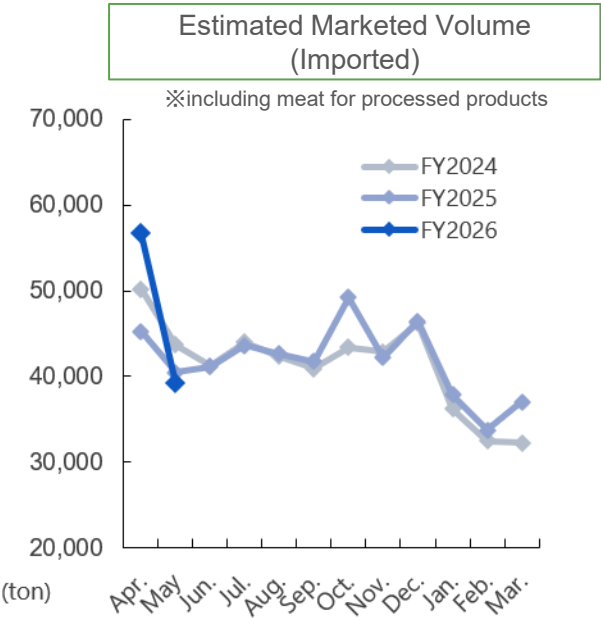


Our share

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】													
FY2025	22.7	23.2	21.3	20.0	20.4	20.0	20.7	21.6	26.5	21.3	21.5	21.7	21.6
FY2026	22.1	22.5	21.8										22.1
【value per 100 monitors year-on-year】													
FY2025	101.3	100.9	105.1	101.1	108.2	102.6	101.9	102.1	101.8	104.1	100.6	104.5	104.0
FY2026	108.2	103.2	100.2										103.8
【Average price year-on-year】													
FY2025	101.2	102.3	99.9	101.9	100.9	102.9	102.5	102.1	101.3	100.6	103.2	102.4	101.8
FY2026	103.2	100.6	101.6										101.8

Marketed Volume/
Ending Stock/
Market Price
(Beef)



※including meat for processed products

●Estimated Marketed Volume (Apr.- May.)

	%
Total	+ 5.9 %
Import	+ 11.9 %
Domestic	- 3.1 %

●May. Ending inventory (Y on Y)

	%	t
Import	- 4.3 %	(- 5,887 t)

●Market Price

Domestic Beef Prices (Apr.-Jun.)

(Tokyo Market Wagyu A5, Tax Included)

2,682 (+ 213) yen/kg

(Tokyo Market Wagyu A4, Tax Included)

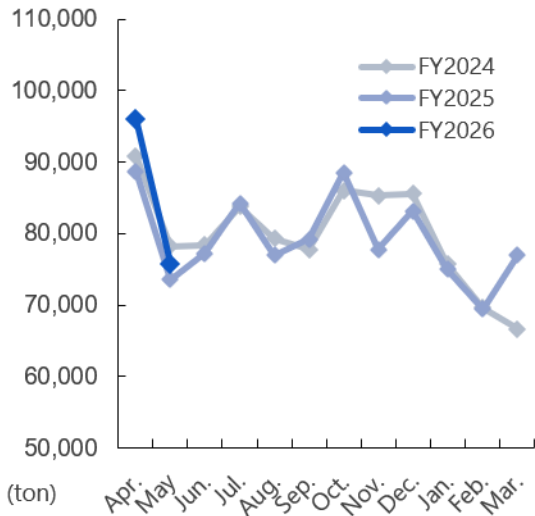
2,503 (+ 291) yen/kg

Marketed Volume/
Ending Stock/
Market Price
(Pork)



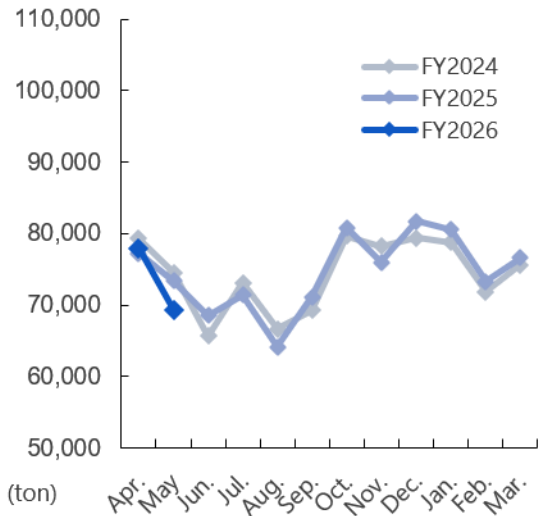
Estimated Marketed Volume
(Imported)

※including meat for processed products



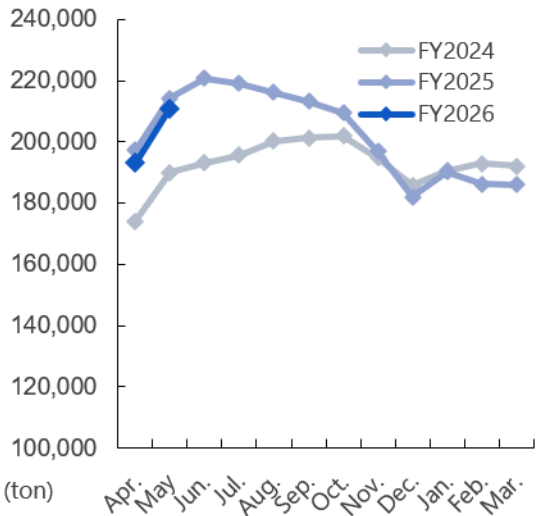
Estimated Marketed Volume
(Domestic)

※including meat for processed products

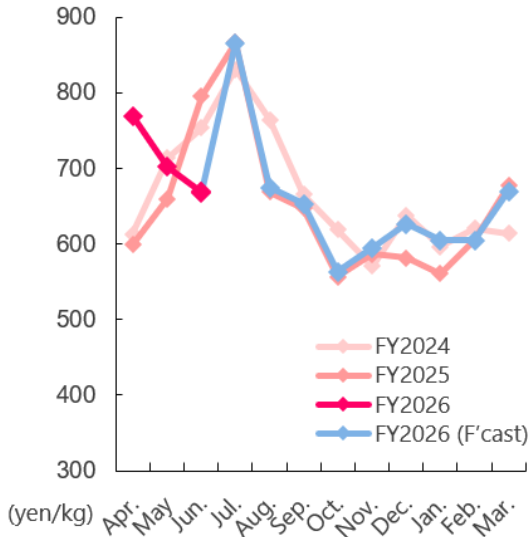


Estimated Ending Stock
(Imported)

※including meat for processed products



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



※including meat for processed products

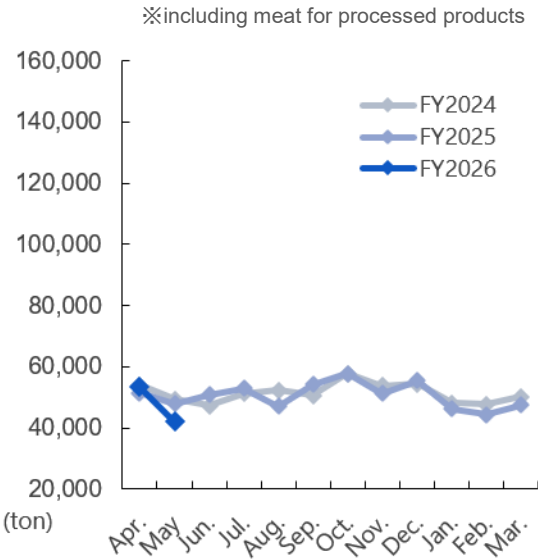
- Estimated Marketed Volume (Apr.- May.)
 - Total + 2.0 %
 - Import + 5.9 %
 - Domestic - 2.3 %
- May. Ending inventory (Y on Y)
 - Import - 1.5 % (- 3,190 t)
- Market Price
Domestic Pork Carcass Prices (Apr.- Jun.)
(Tokyo Market Excellent Grade, Tax Included) 713 (+ 29) yen/kg

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

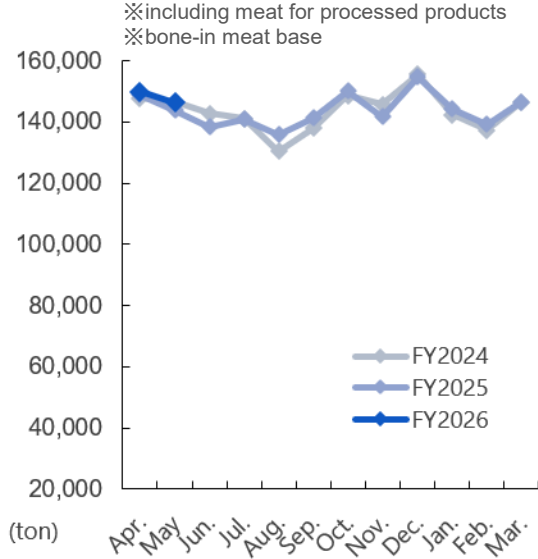
Marketed Volume/
Ending Stock/
Market Price
(Chicken)



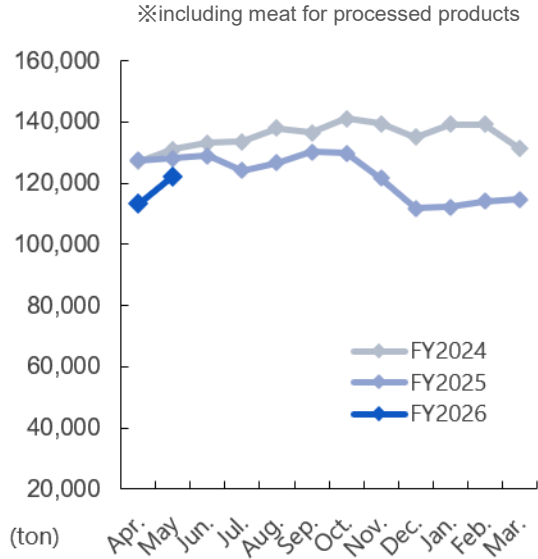
Estimated Marketed Volume
(Imported)



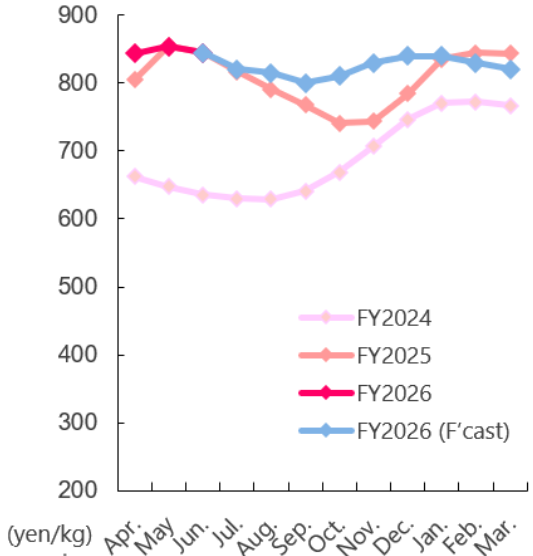
Estimated Marketed Volume
(Domestic)



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.-May.)	
Total	- 0.2 %
Import	- 4.1 %
Domestic	+ 1.2 %

● May. Ending inventory (Y on Y)	
Import	- 4.6 % (- 5,940 t)

● Market Price	
Domestic Chicken Thigh Meat (Apr.-Jun.)	
(Excluding tax)	847 (+ 12) yen/kg
Domestic Chicken Breast Meat (Apr.-Dec.)	
(Excluding tax)	494 (- 2) yen/kg



Upcoming
Disclosure

FY2026 H1 results

Scheduled Disclosure : Wed, Nov 4, 2026

Contact Information

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<https://www.itoham-yonekyu-holdings.com>

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