

JFL/NSE-BSE/2024-25/79

February 27, 2025

**BSE Ltd.**  
P.J. Towers, Dalal Street  
Mumbai – 400001

**National Stock Exchange of India Limited**  
Exchange Plaza, Bandra Kurla Complex  
Bandra(E), Mumbai – 400051

**Scrip Code: 533155**

**Symbol: JUBLFOOD**

**Sub: Investor Day - Presentation**

**Ref: Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015 (“Listing Regulations”)**

Dear Sir/ Madam,

In continuation to our letter no. JFL/NSE-BSE/2024-25/66 dated January 27, 2025 regarding the Investor Day 2025 scheduled to be held later during the day i.e. Thursday, February 27, 2025, please find enclosed herewith the Presentation that will be discussed during the meet.

The above details will also be available on the Website of the Company at [www.jubilantfoodworks.com](http://www.jubilantfoodworks.com)

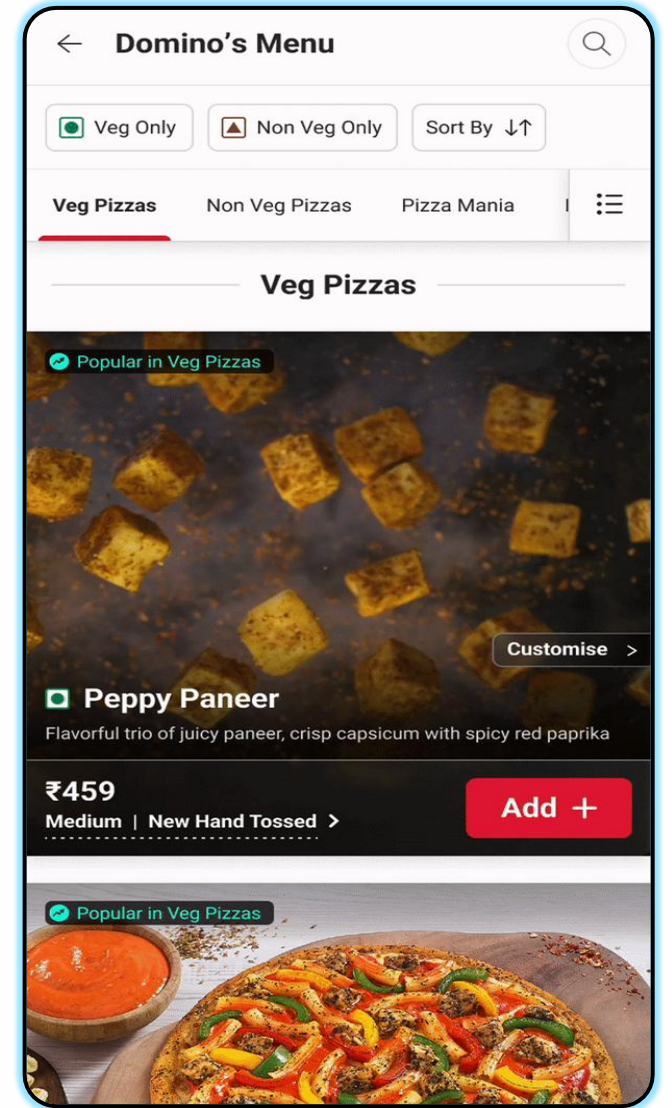
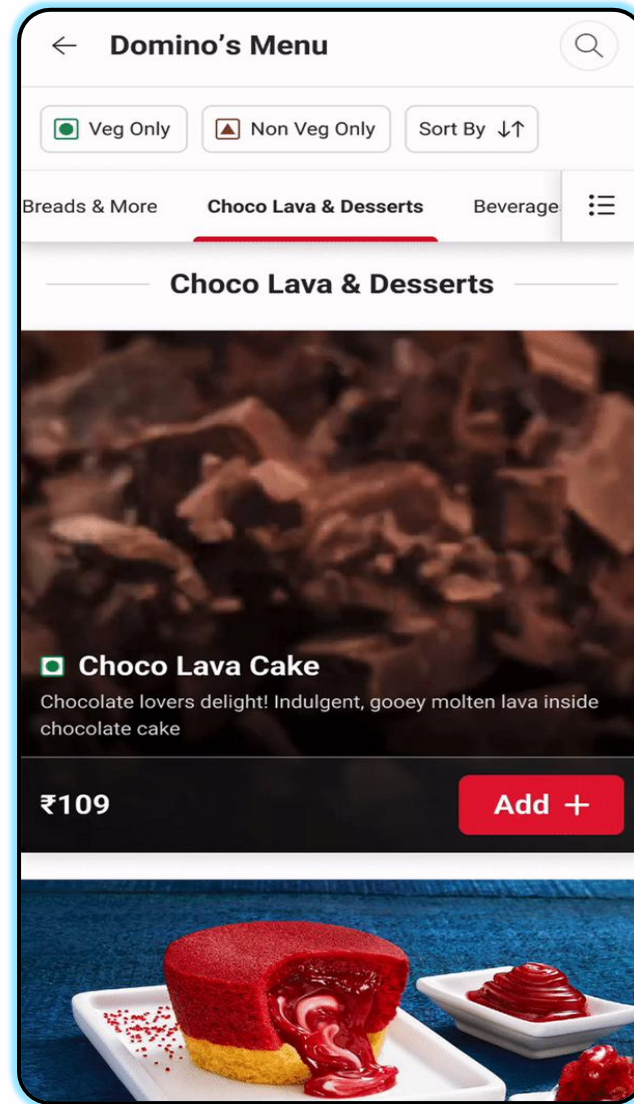
This is for your information and records.

Thanking you,  
For **Jubilant FoodWorks Limited**

**Mona Aggarwal**  
**Company Secretary and Compliance Officer**  
Investor E-mail id: [investor@jublfood.com](mailto:investor@jublfood.com)  
Encl: A/a



*Investor Meet  
2025*



*Wining with purpose, technology and food  
By Sameer Kheterpal*

## DISCLAIMER

*Statements in this document relating to future status, events, or circumstances, including but not limited to statements about plans and objectives, the progress and results of research and development, potential product characteristics and uses, product sales potential and target dates for product launch are forward looking statements based on estimates and the anticipated effects of future events on current and developing circumstances. Such statements are subject to numerous risks and uncertainties and are not necessarily predictive of future results. Actual results may differ materially from those anticipated in the forward-looking statements. Jubilant FoodWorks may, from time to time, make additional written and oral forward-looking statements, including statements contained in the company's filings with the regulatory bodies and our reports to shareholders. The Company assumes no obligation to update forward looking statements to reflect actual results, changed assumptions or other factors.*



OUR START

1996





Domino's 1st store opened  
in GK-1 New Delhi

# Unprecedented Store Expansion pace



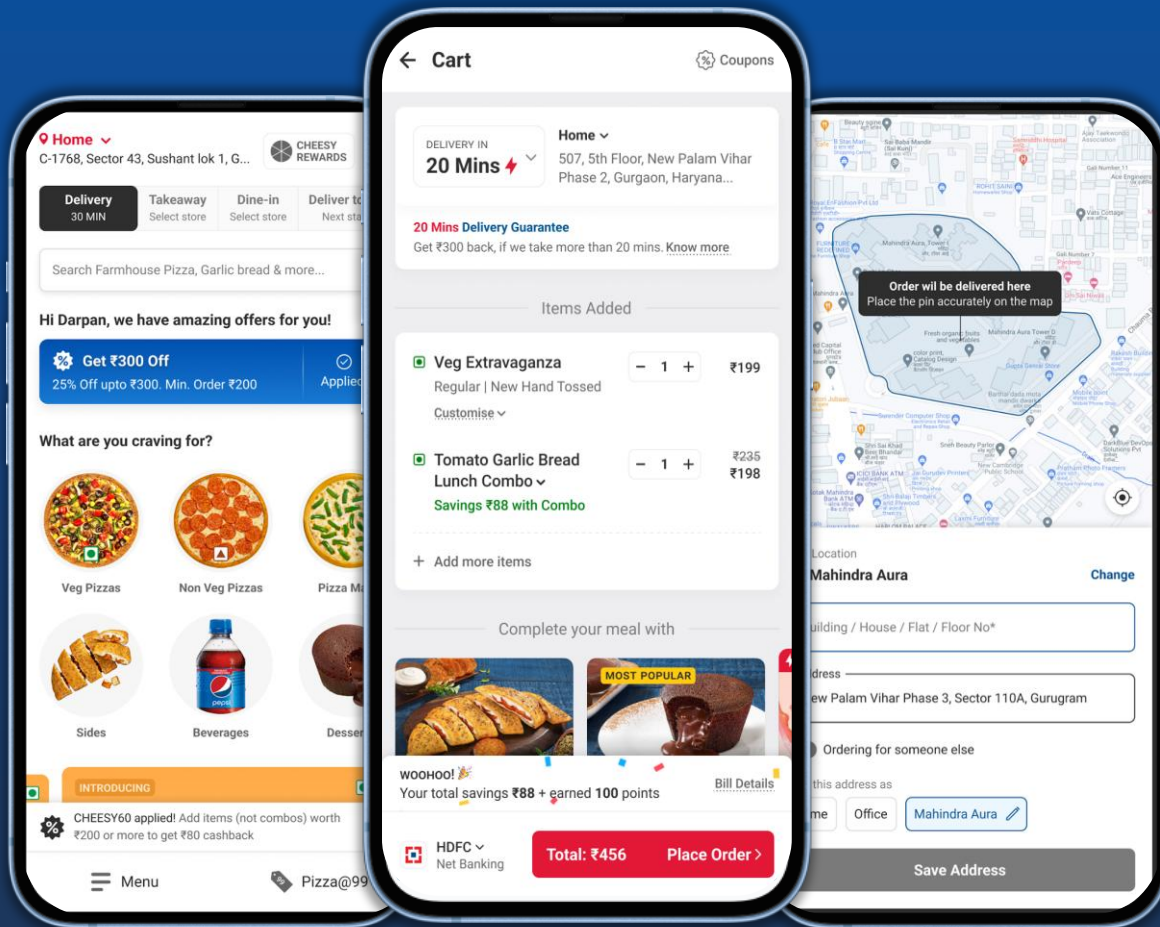
*2004: Pioneered 30 min delivery OR Free*



*Setting our own  
customer delivery  
promise*



# 2011 : First to launch "Own Mobile App" for ordering



# Majority

Orders via own app

# 12M+

App Downloads every quarter

# 5M+

Monthly Transacting Users (MTUs)

# 30M+

Loyalty program enrollments

# Owning “farm to fork” gives us highest margins in Industry

1



+

2



+

3



+

4



Backward integrated  
farm sourcing

Inhouse  
Manufacturing

8 own Apps for  
customer orders

45,000+ riders  
delivering in 20 mins

# Industry leading margins

# JFL is a Multi-brand Food-tech company

## Five Brands



#1 in Pizza Globally

**POPEYES**

#2 in Chicken Globally

**COFFY**

Fast growing  
Café Brand



First Indo-Chinese  
QSR Brand

**DUNKIN'**

#1 Coffee & Donuts  
Brand in USA

## Serving 22% world population



**INR 57B**

FY'24 Revenue

**3,000+**

Stores

**15M+**

Monthly Active  
Users on App

**45,000+**

Own Rider fleet

**34,000+**

People Employed

JFL's purpose: We serve Joy



**B**REAKTHROUGH TECHNOLOGY

**O**PERATE WITH EXCELLENCE

**L**EAD WITH PURPOSE

**D**ELICIOUS FOOD

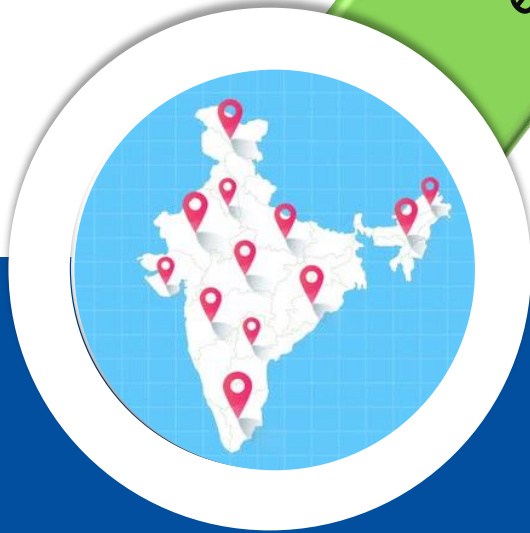
# BREAKTHROUGH TECHNOLOGY

OLD



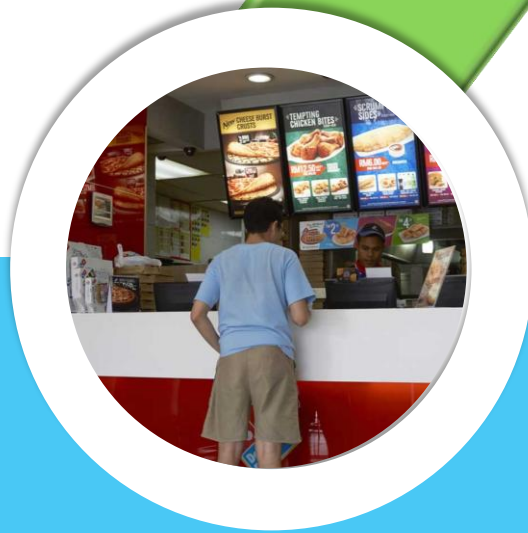
# Breakthrough Technology embedded across touchpoints

Network expansion



1000 high priority locations

Revenue per store



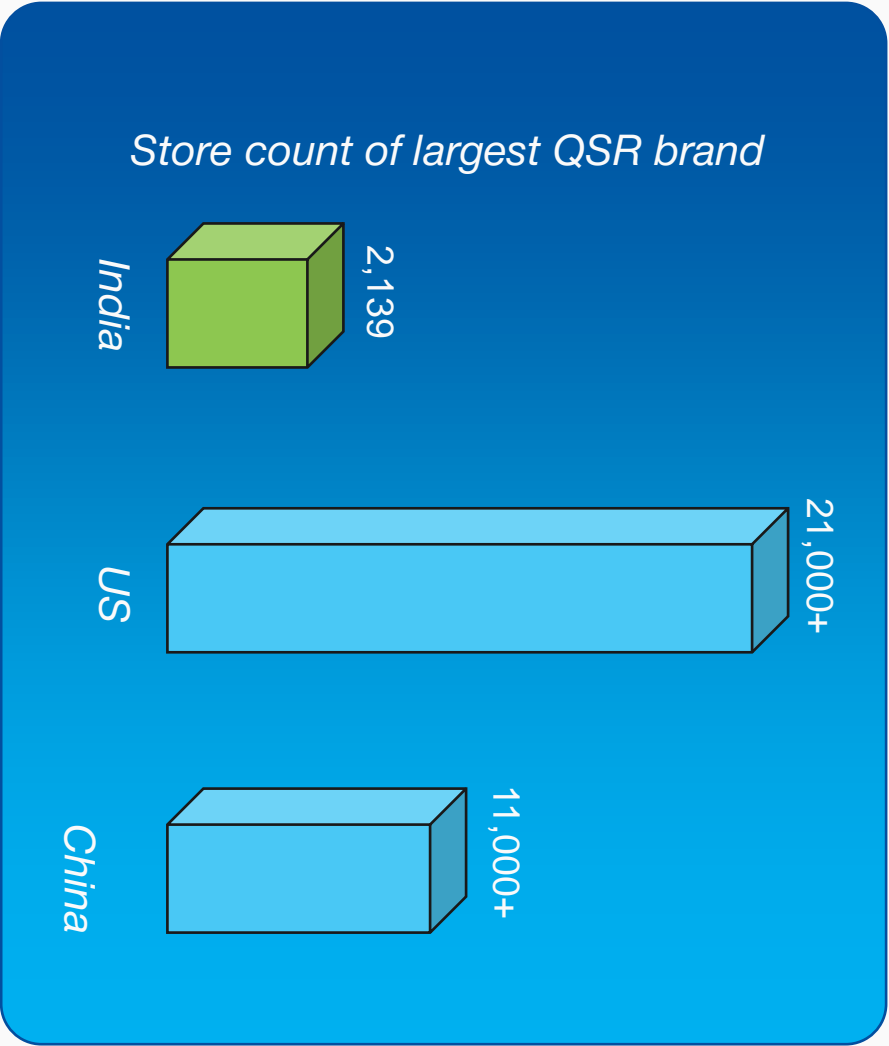
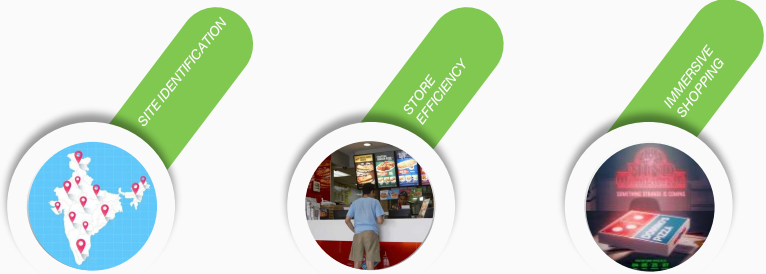
>25% improvement in store throughput

Immersive food-first experiences



2x loyalty through proprietary data

# Utilize Proprietary Location.AI for site identification



*A lot remains to be done*

*Access to 1000+ prioritized sites*

# Make stores smarter with Store.AI

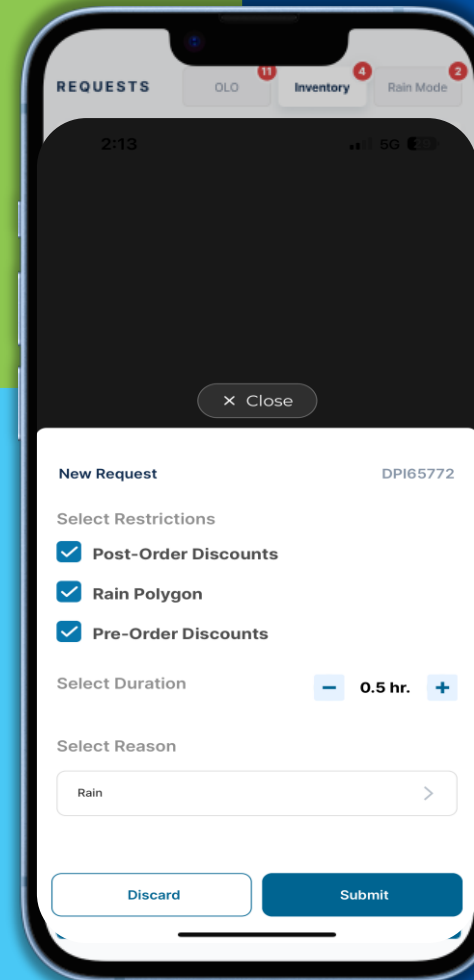
## 1 Next Gen inventory Management



## 2 Advanced Surveillance



## 3 Restaurant Co-pilot



Manage App Traffic

Rain-mode

Optimize Discounts

One-click KPI tracking

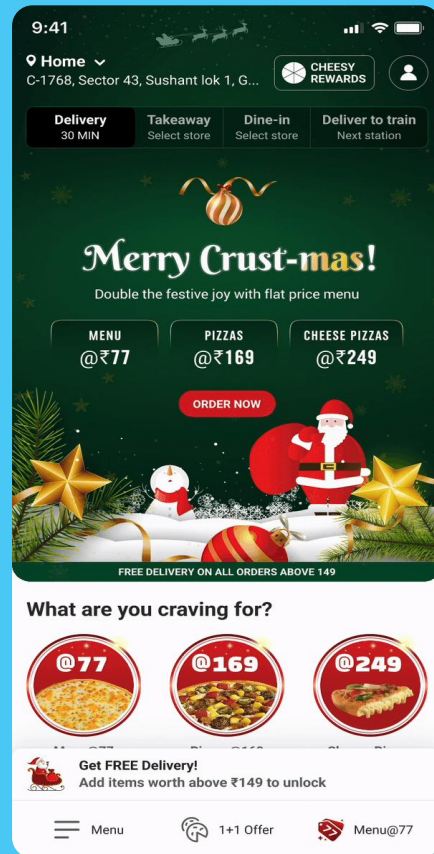
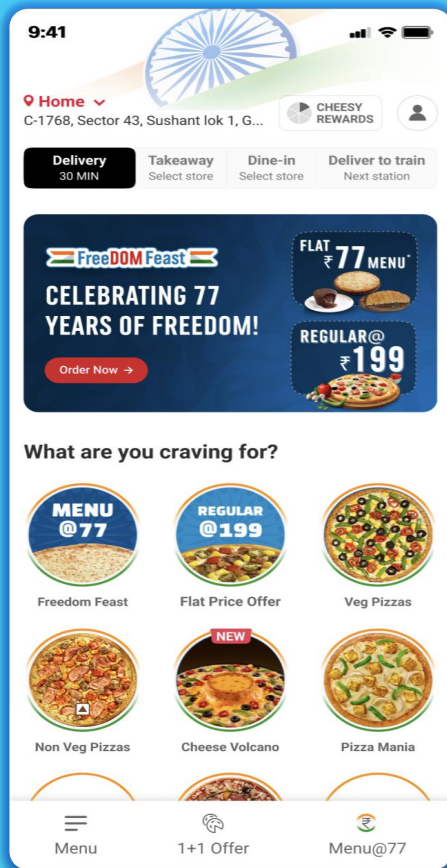
Rider attendance & tracking

BE THE  
**BOLD**

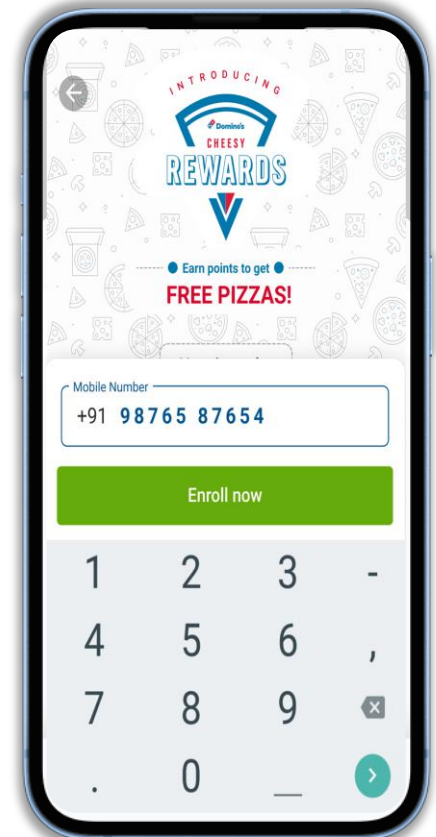
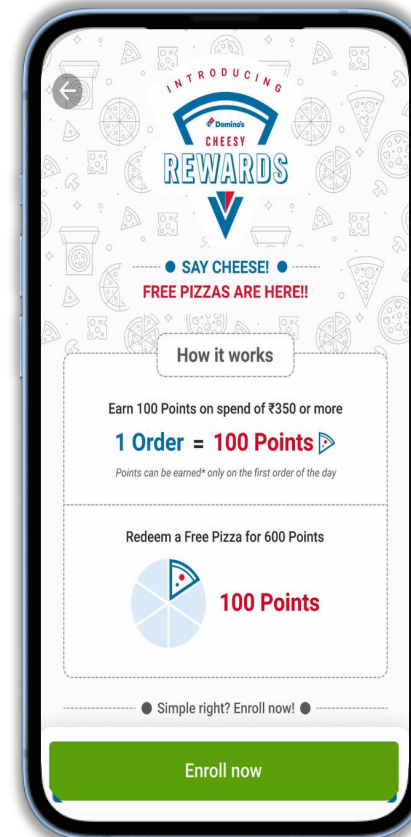


# Give Immersive & delightful Customer shopping

## Hyper personalized Apps



## Loyalty 2.0 program





BE THE  
**BOLD**

**B**  
**O**perate with Excellence  
**L**  
**D**



# Bangalore Food Park

ONE-OF-ITS-KIND; Commenced operations on 9<sup>th</sup> November 2023

Multi-category processing

*Dough*

*Chicken*

*Seasoning*



Multi-temperature warehouses

*Frozen*

*Chilled*

*Ambient*

Cold chain transport

275+ multi-compartment trucks  
RFID tagged reverse logistics

***Lowest recipe cost & high fill rates to stores***

*Marinated Chicken*

*Pizza Dough*

*Seasoning*



BE THE  
**BOLD**

# Investing in 4 more Commissaries





# *Freshest Pizza delivered Fastest*



**DELIVERY GUARANTEE \***

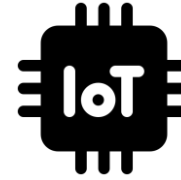


*Serving 7 million+ orders within 20 mins every month*

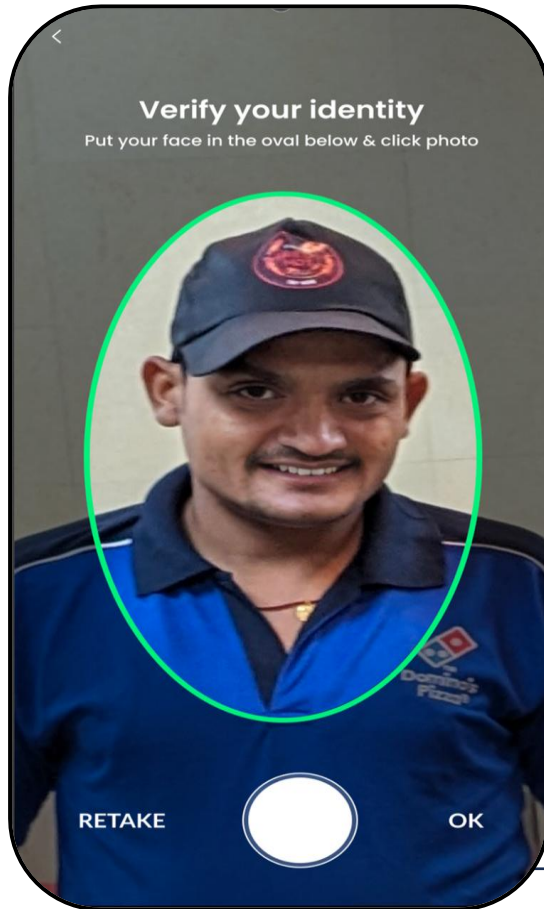
# Enabled via Propriety Last Mile Platforms



*Delivery Management System*



*iOT driven governace*



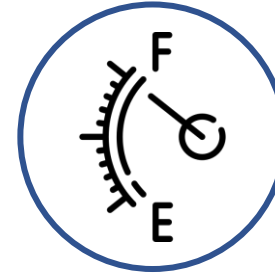
*Selfie Validation*

*Shift rostering*

*Last Mile Delivery*

*Society App Collaboration*

*Earnings & Incentives*



*Higher fuel efficiency*

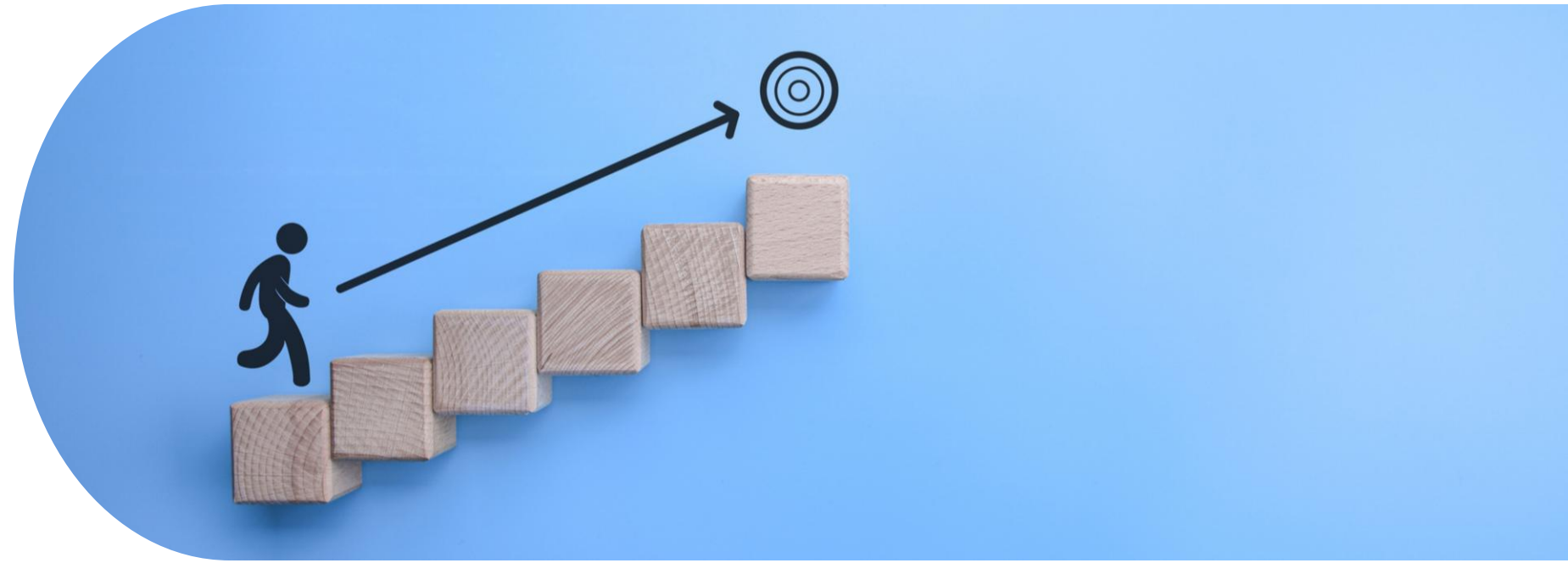


*Optimal bike utilization*



*Behavior Compliance*

B  
O



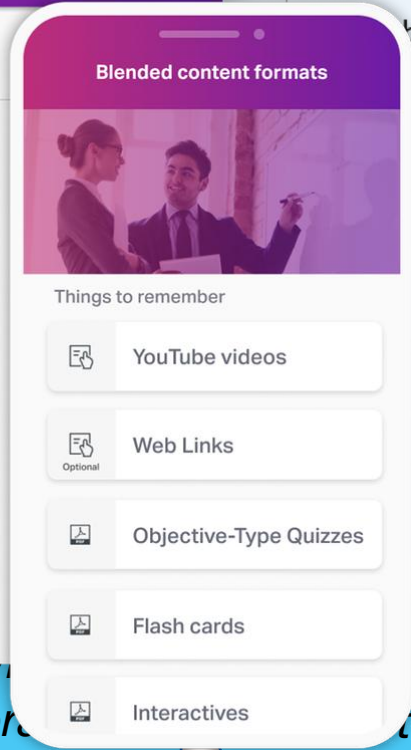
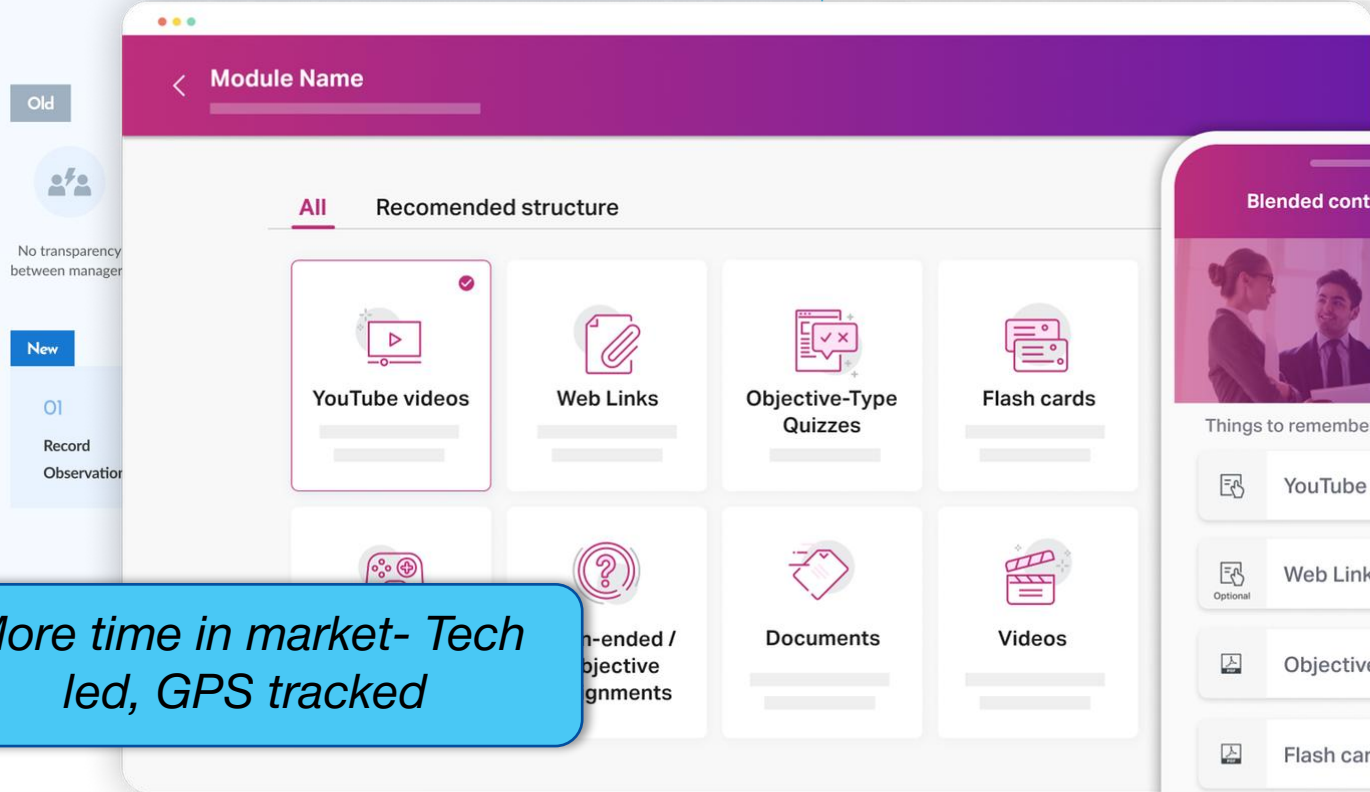
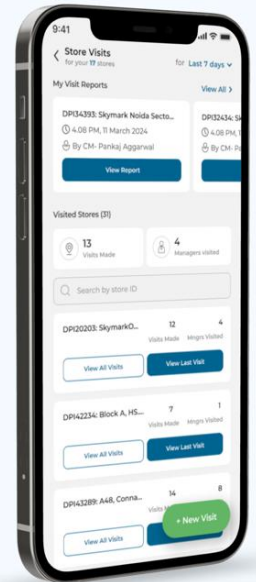
L ead with Purpose

D



# Our Team ensures that every store delivers

Top store sales in circle



Tools

High frequency trainings

More time in market- Tech led, GPS tracked

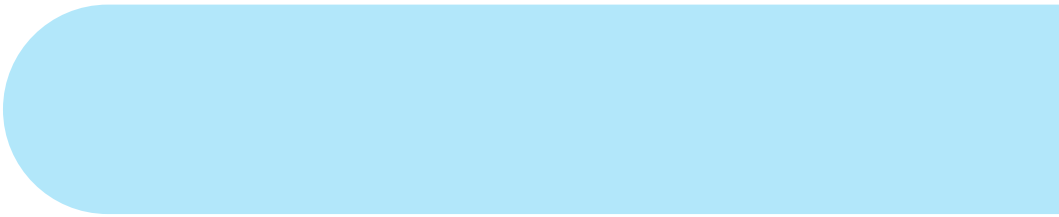
"Zero defect tool" that gives capsule sized trainings

Time on insights vs data automated dashboards

B  
O

L

**D**elicious Food



BE THE  
**BOLD**

# More Platforms coming in future

## Big Big Pizza





# More Platforms coming in future



Cheesy Rice





# More Platforms coming in future



Big Big Pizza



Cheesy Rice

## New Value Range



Korean bun



Cheese tart



Wraps



Keema egg

# Our Strategy: "BE THE BOLD"

*Breakthrough technology*



- *Identified 1000 priority sites with Location.AI*
- *Immersive, engaging, vertical-apps: 2x the loyalty*
- *Restaurant Co-pilot : breaking the EBITDA barrier*

*Operate with Excellence*



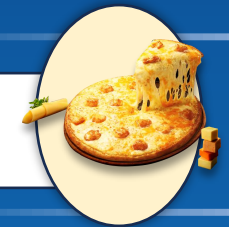
- *Reach customers in <20 mins in seven metros*
- *Regional but integrated supply chain with insourcing of critical ingredients (e.g., sauces, seasoning)*

*Lead with Purpose*



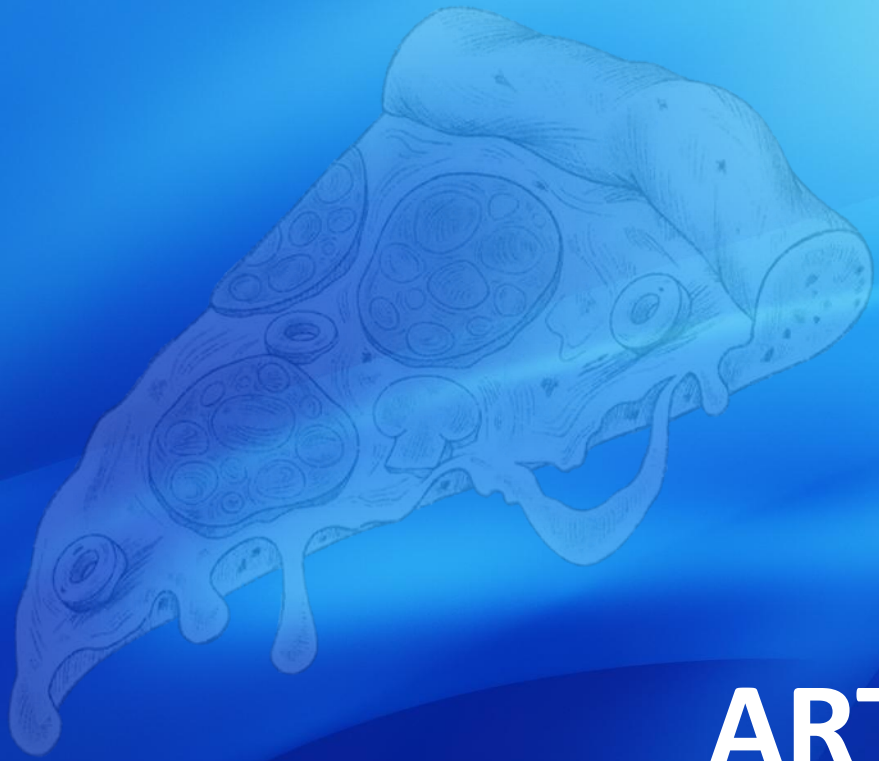
- *Embed JFL values; be the top employer of choice*
- *Hustle mindfully to have the highest throughput per store in the world*

*Delicious Food*



- *Build food-platforms of Rs.10 billion in annual sales*





# ART OF FRANCHISING

**ASLAN SARANGA**

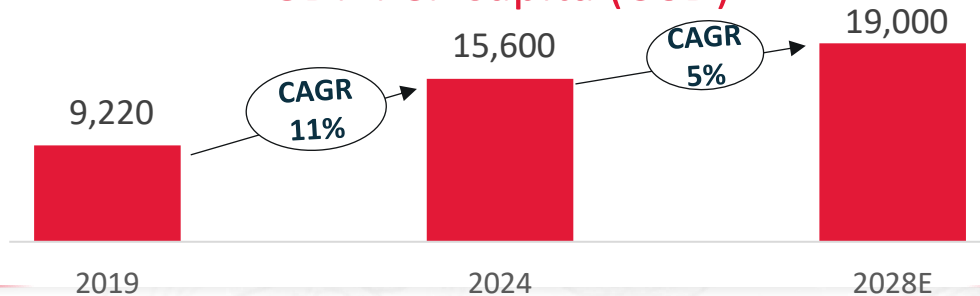
# OUR JOURNEY BEGAN IN 1996



# THE FAST GROWING QSR MARKET

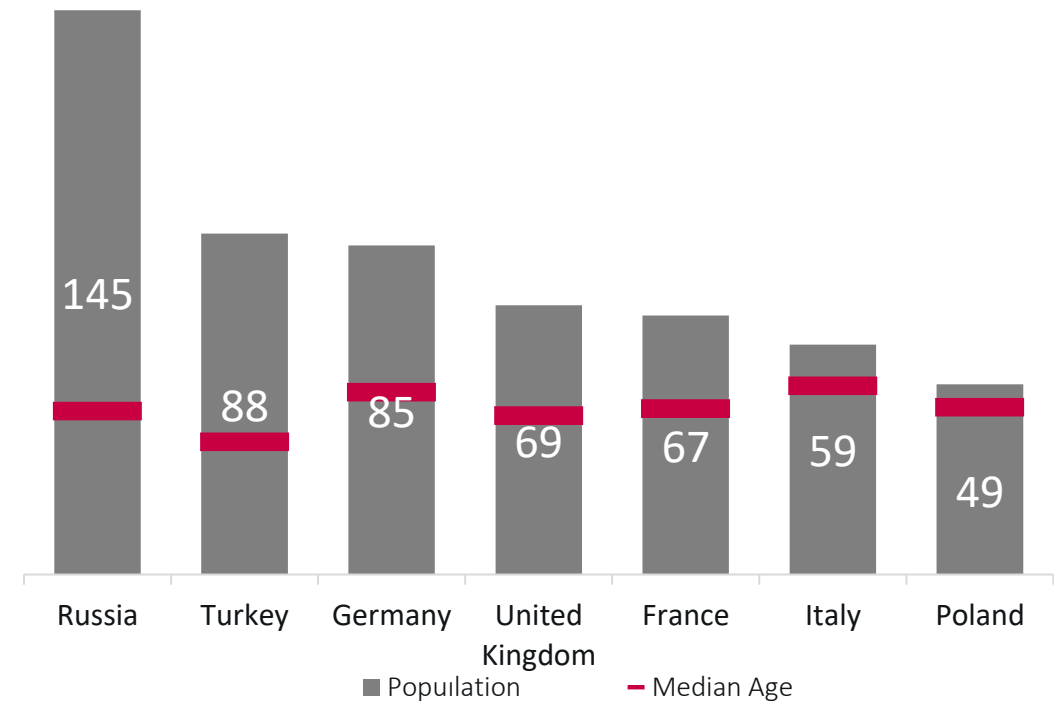
## High Growth Market

### GDP Per Capita (USD)



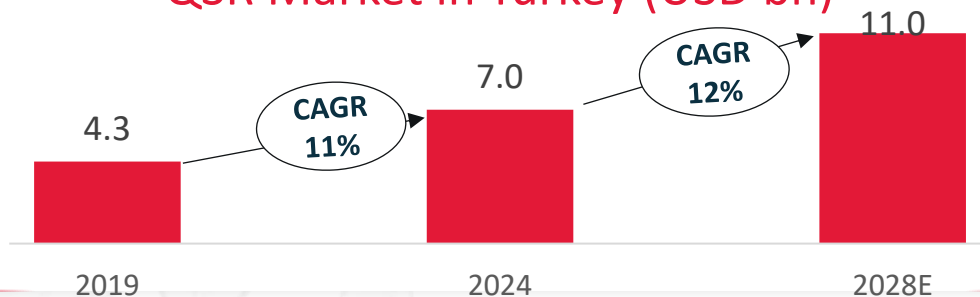
## Largest and Youngest Population

### Demographics in Turkey

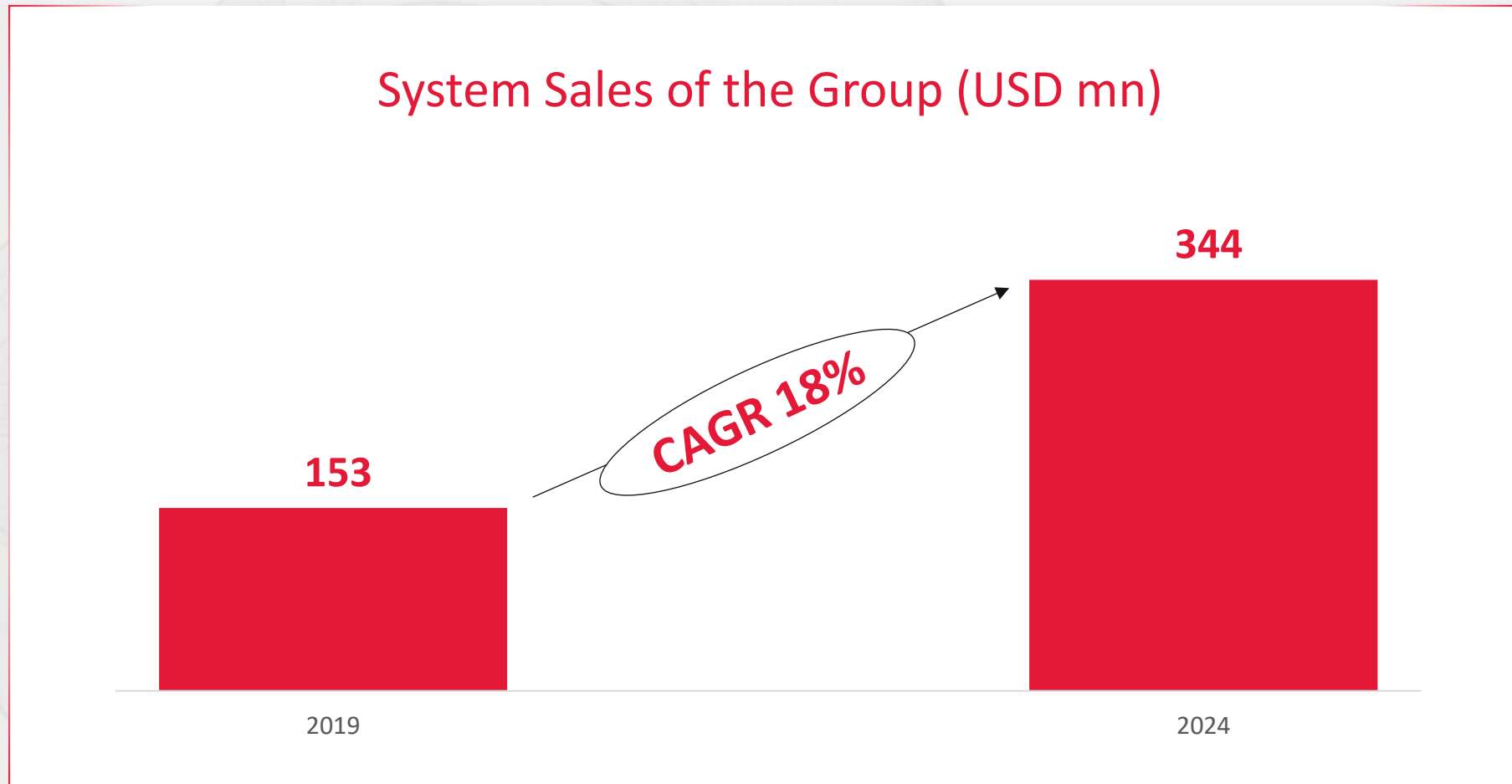


## Fast Growing QSR Market

### QSR Market in Turkey (USD bn)

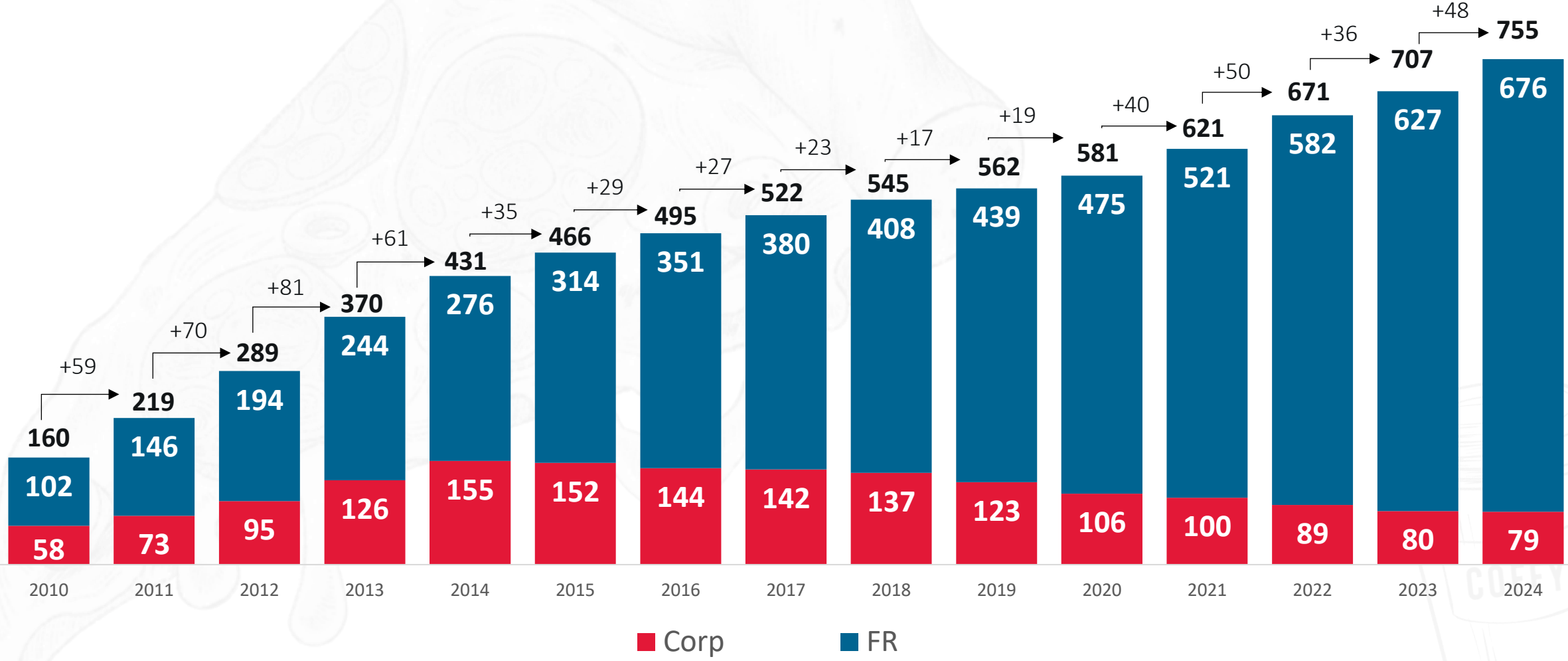


# GROWING FASTER THAN THE MARKET





# FRANCHISE-LED SUSTAINABLE GROWTH



\*The franchise store figures incorporate the counts from Turkey, with an additional 10 branches in Azerbaijan and 7 branches in Georgia



# KEY ENABLERS OF INFLATION-BEATING STRONG LFL GROWTH...

## GOOD VALUE AND DYNAMIC PRICING



## PRODUCT INNOVATION



## DIGITAL INNOVATION



## EXCELLENCE IN DELIVERY

EDT 20min.

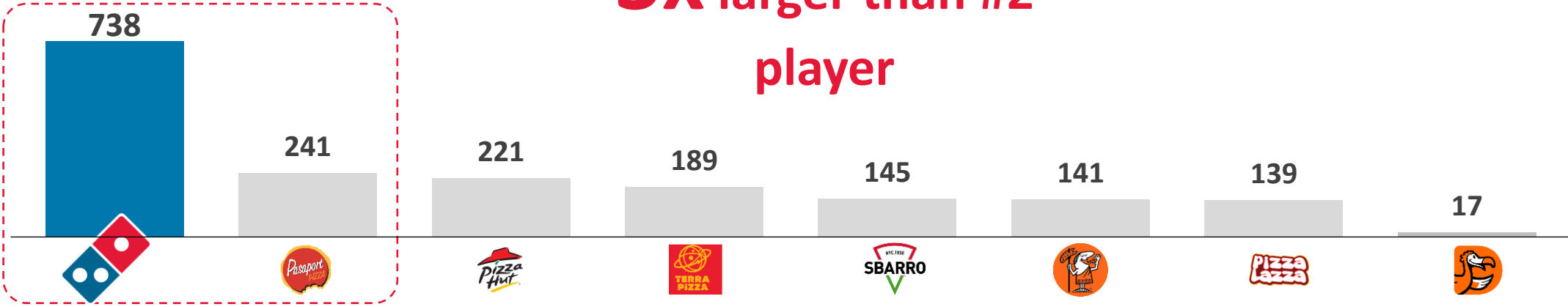


# NUMBER 1 IN PIZZA MARKET

#1 in pizza market,

Chained pizza in Turkey, number of stores, FY 2024

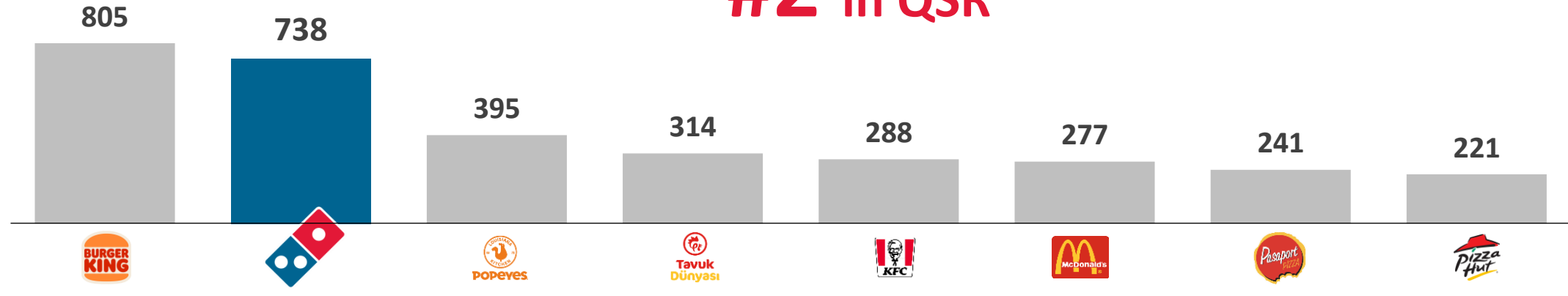
3X larger than #2 player



... is #2 player in the fast food market...

Number of stores, FY 2024

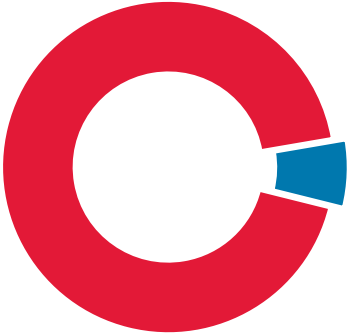
#2 in QSR



# NUMBER 1 IN PIZZA MARKET

Total F&B Market

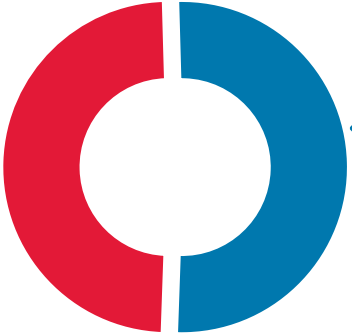
2024  
16.3b  
USD



2024  
1.2b  
USD  
Pizza Market

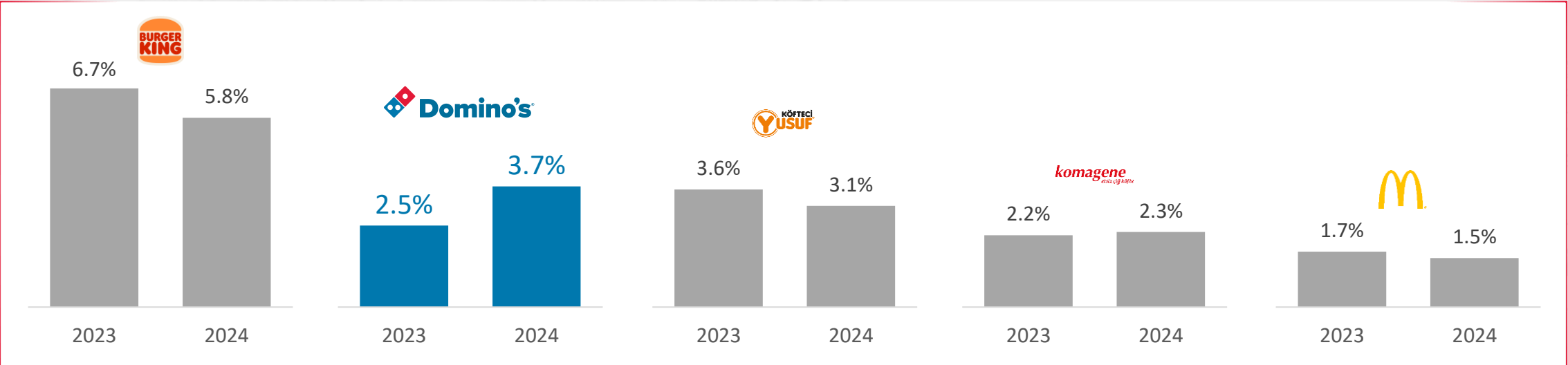
Pizza Market

Others  
%49



**Domino's**  
%51

## DOMINO'S MARKET SHARE





# CROSS-BORDER OPERATIONS



## AZERBAIJAN

- Market Entry: 2015
- 10 STORES
- Population: Azerbaijan: 10,2m
- GDP per capita: 6.830 USD (IMF 2022)

## GEORGIA

- Market Entry: 2015
- 7 STORES
- Population: Georgia: 3,71m
- GDP per capita: 6.670 USD (IMF 2022)



# STRONG BRAND EQUITY

STRONG

POPULAR

RESPECTED

DISTINGUISHED

EXPERT



BRAND  
AWARENESS

99%



COFFY

# FOUNDER – LED, EXPERIENCED MANAGEMENT TEAM



**Aslan Saranga**

Founder Group CEO of DPEU



15-time Gold  
Franny Winner

Best Master Franchisee for  
operational excellence,  
revenue increase and growth.



**Neval Korucu Alpagut**

Group CFO  
18 years at DPEU



**Kerem Ciritçi**

Dominos CEO  
18 years at DPEU



**Muhsin Emre Cevlik**

Coffy COO  
13 years at DPEU



**Ege Hanoğlu**

Group CTO  
2 years at DPEU



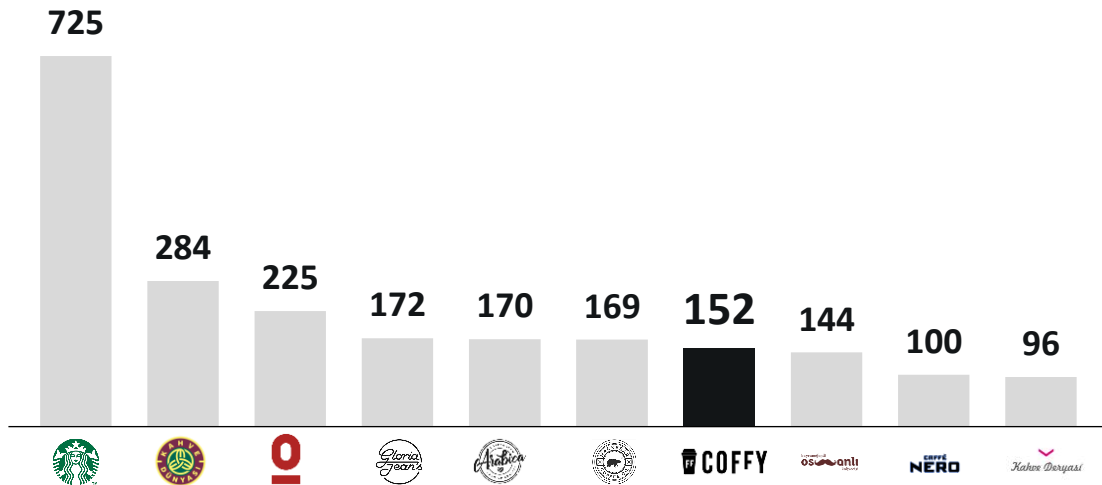
# COFFY 1<sup>ST</sup> STORE OPENING



# COFFY'S RAPID RISE in the TURKISH COFFEE MARKET

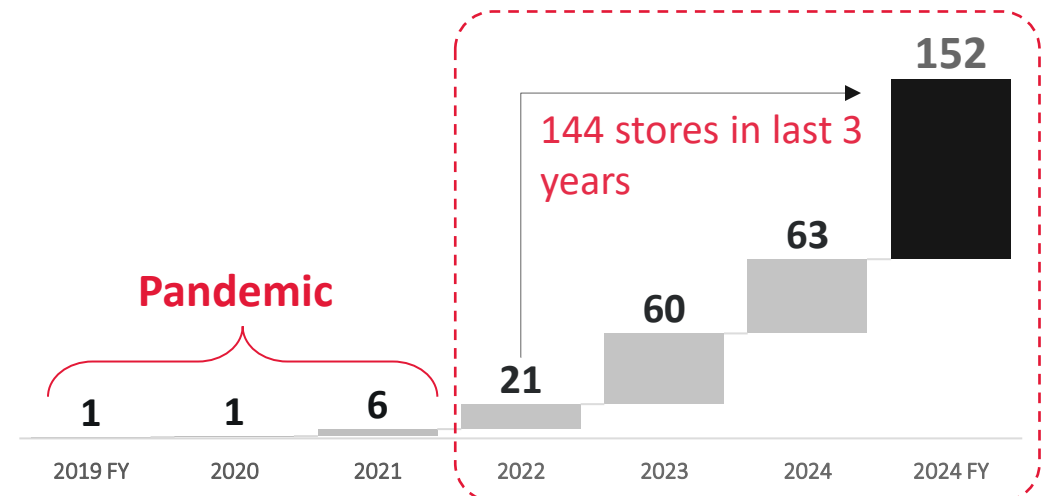
## Chained coffee market

Chained coffee in Turkey, number of stores, FY 2024



## Store growth...

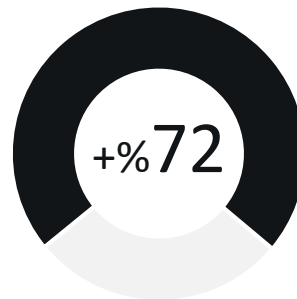
Net store addition, 2019 to FY 2024



## Specialist Coffee & Tea Shops Market Value

Disrupting the Coffee Market with 36 months ROI

2023  
755m USD



2028  
1,3b USD



# OUR VALUE PROMISE

## 1. Simplicity

Single Price for all drinks



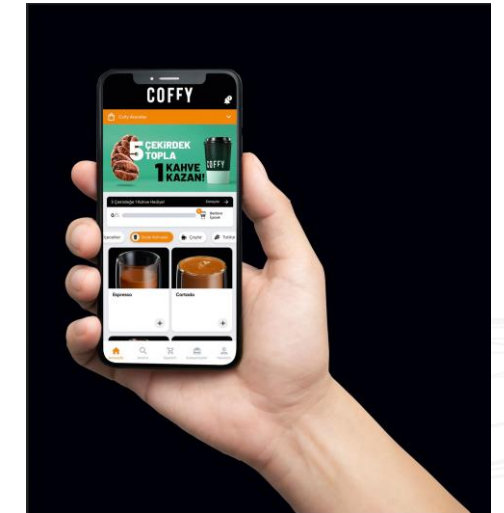
## 2. Value for Money

Attractive Pricing



## 3. Digital Coffee Chain

App Ordering



BE THE  
**BOLD**

**B**reakthrough Technology

**O**

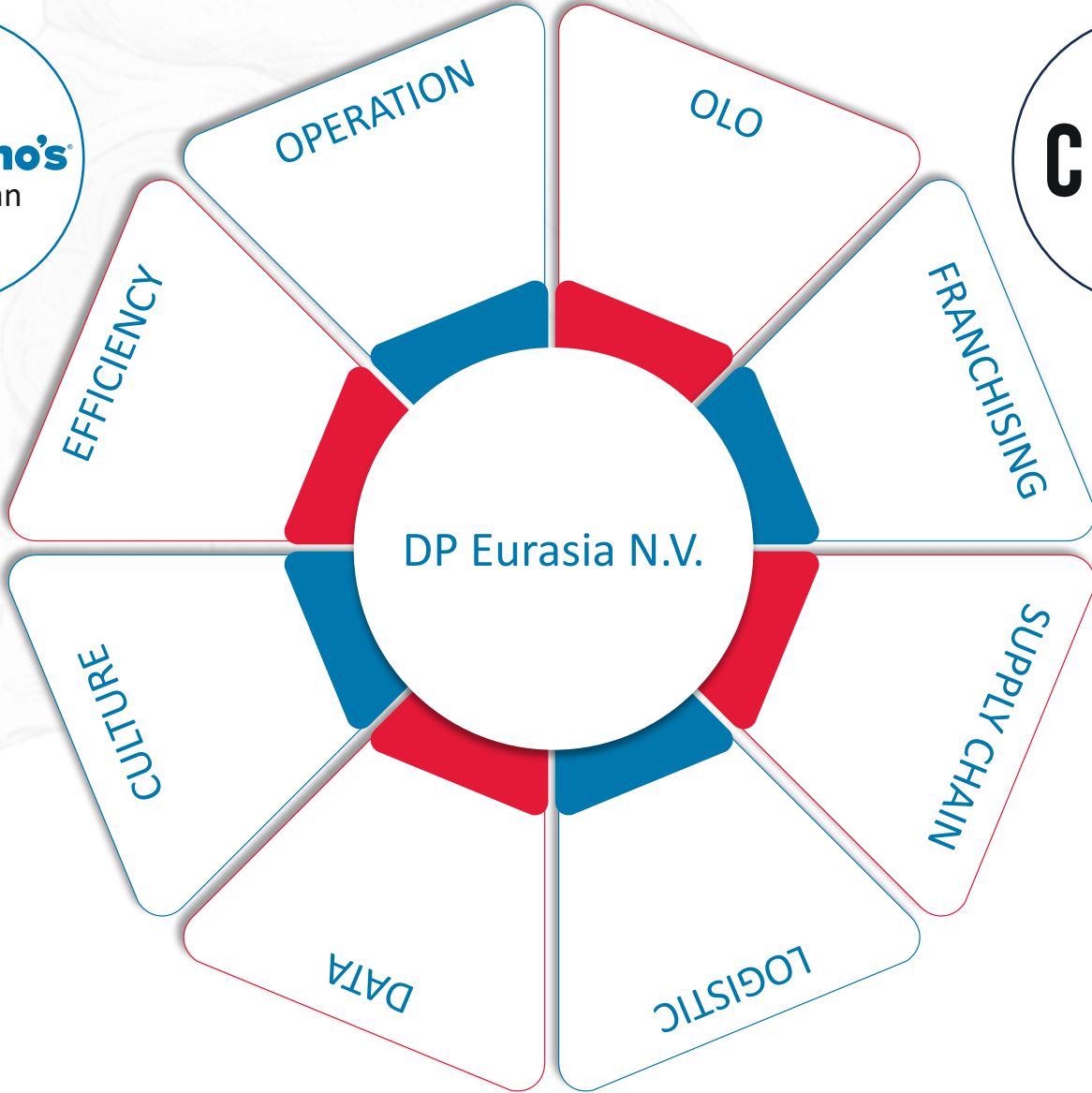
**L**

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# FOODTECH VISION / ROAD TO NUMBER 1 IN QSR

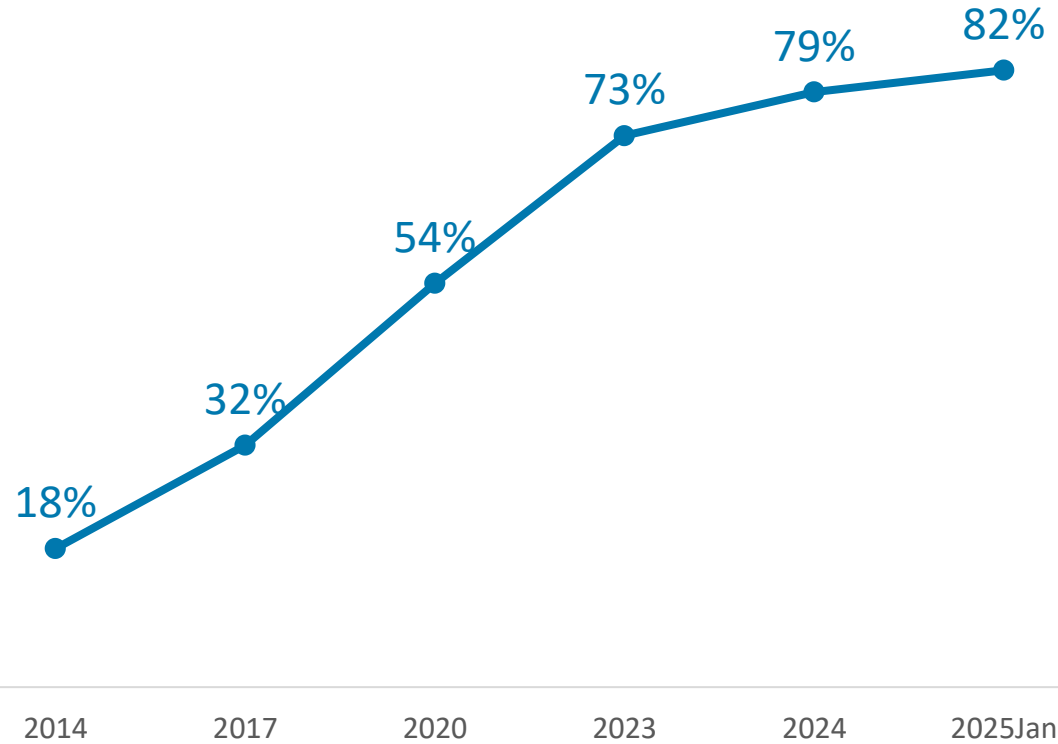


# UNLOCKING GROWTH WITH DIGITAL TRANSFORMATION

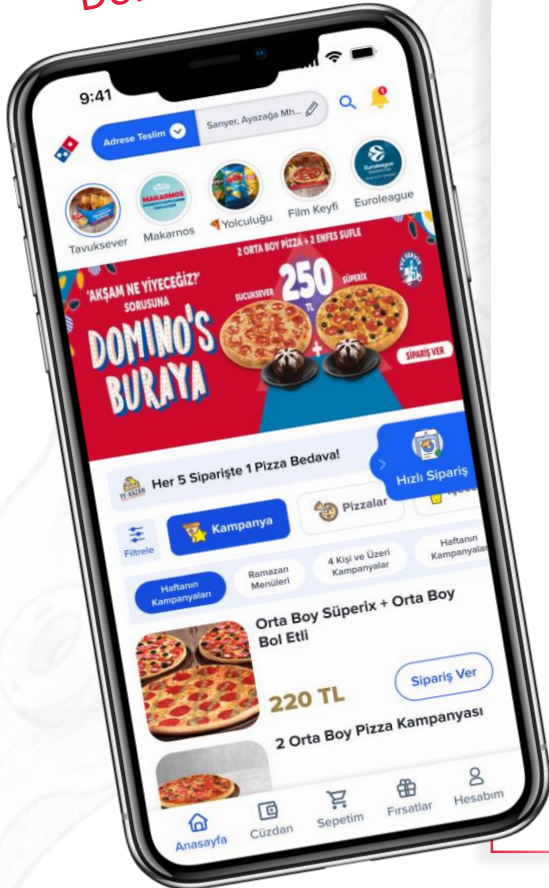


# SCALE UP WITH DIGITAL

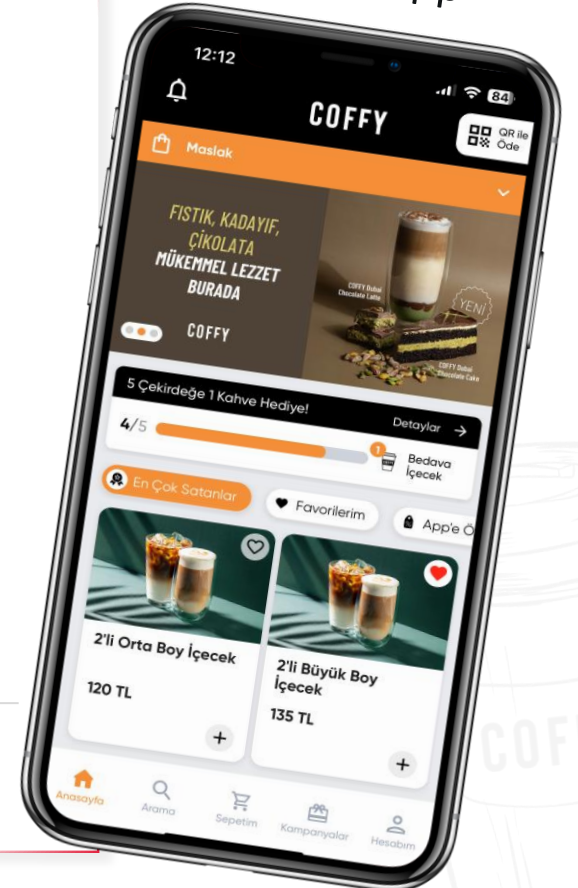
Total in Digital Share %



Domino's App



SuperApp



# SCALE UP WITH DIGITAL

## SALES

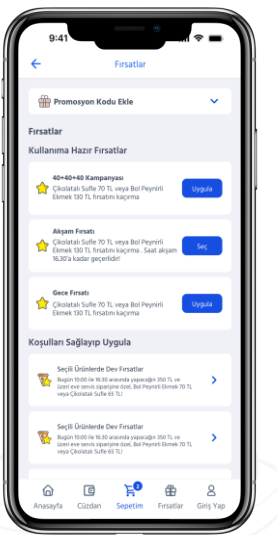
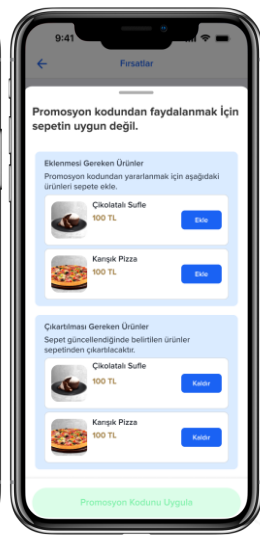
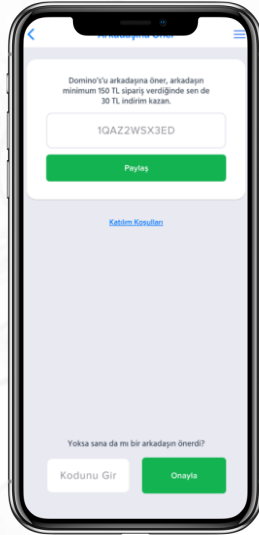
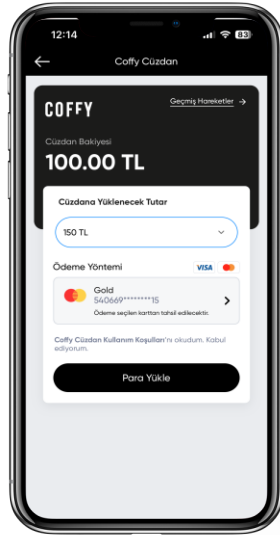
## FREQUENCY

### Wallet

### New Loyalty

### Refer a Friend

### Personalization



## SEAMLESS & DELIGHTFUL

## CUSTOMER PURCHASE JOURNEY



# TOOLKIT for FRANCHISEE MANAGEMENT

## SALES & GROWTH

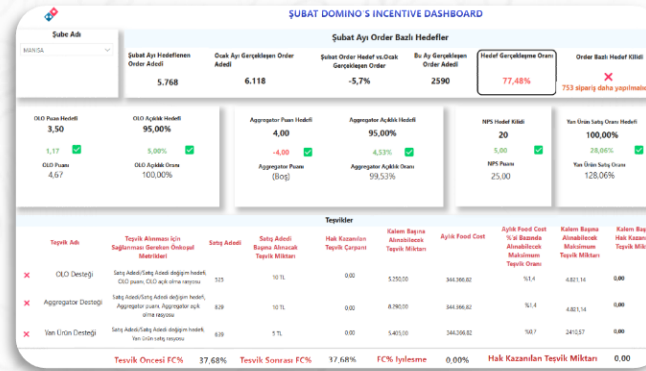
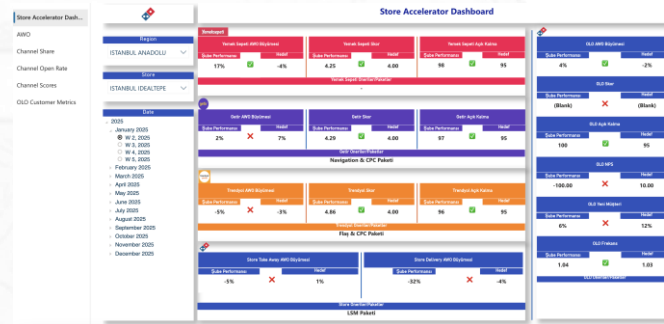
Store Accelerator Tool

Franchise Incentive Model

Site Selection Model

Power BI

Franchise P&L Monitoring and Benchmarking



## OPERATIONAL EXCELLENCE

Franchise Survey

Temperature Monitoring System

Automatic Ordering System

iUGO

Domino's Support Portal

My Domino's

BE THE  
**BOLD**

**B**

**O**perational Excellence

**L**

**D**



# The POWER of FRANCHISEE-LED GROWTH

"a low-risk, high reward strategy"

**LOW CAPEX**

**RAPID & SUSTAINABLE  
EXPANSION**

**STRONG PAYBACK and  
PROFITABILITY**

**SHARED RISK & LOWER  
CORPORATE LIABILITY**

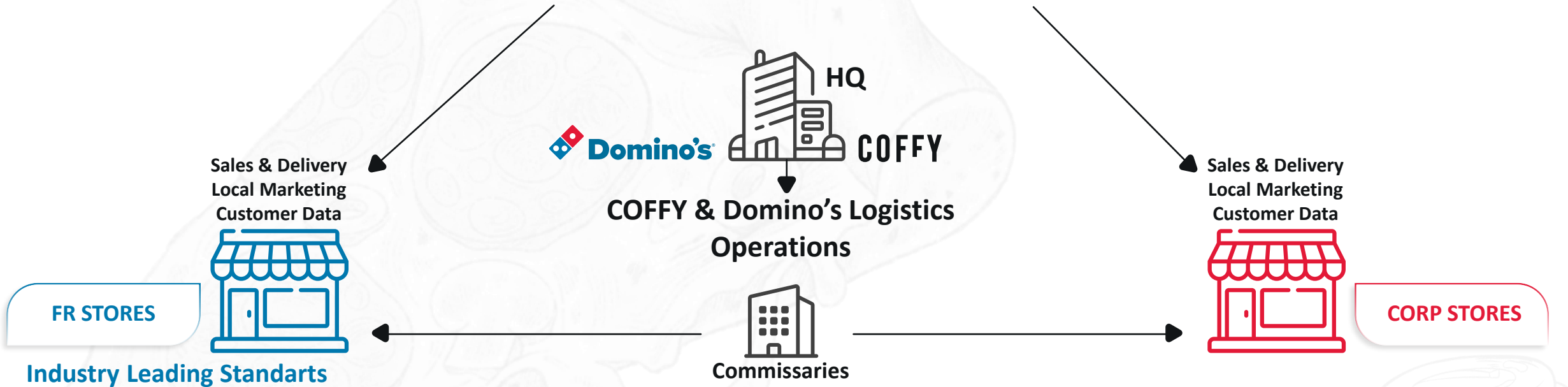
**PERFORMANCE -DRIVEN  
GROWTH**

**BRAND GROWTH & MARKET  
PENETRATION**

**LOCAL KNOWLEDGE & OPERATIONAL  
EFFICIENCY**

# FRANCHISE BUSINESS MODEL

## Centralized Strategy, Marketing & IT



**SCALABLE** 

**WINNING CULTURE** 

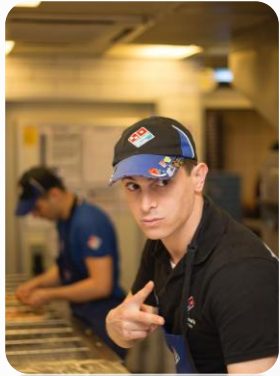
**TECHNOLOGY** 



# SCALING THROUGH STRATEGIC FRANCHISE MODELS

Expanding across 80 cities in Turkey with diverse franchise models, driving nationwide growth

## OPERATOR



Murathan YILMAZ  
1 Store

## HOMEGROWN

96 Homegrown FR  
193 Stores



Ilhan UZUN

FROM BEING a DRIVER to  
BEING the BIGGEST  
FRANCHISEE in the SYSTEM

19 Stores

## INVESTOR OPERATOR



Erhan YORGUN  
18 Stores



## WOMEN

75 Women Franchisees



Serpil ÖZDEN

11 stores

## JOINT VENTURE



David MADEN &  
Region Mng.  
Erkin AYDIN

9 Stores

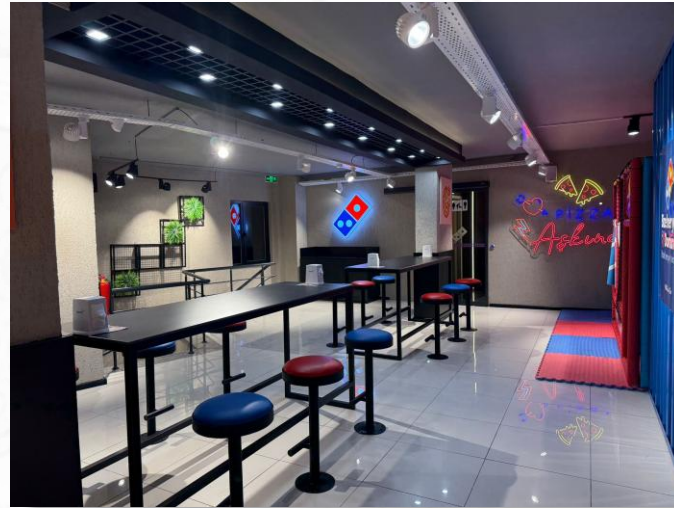
## 2nd GENERATION



Adnan DEMİR &  
Efe DEMİR  
9 Stores



# DOMINO'S KAIZEN+ STORE CONCEPT

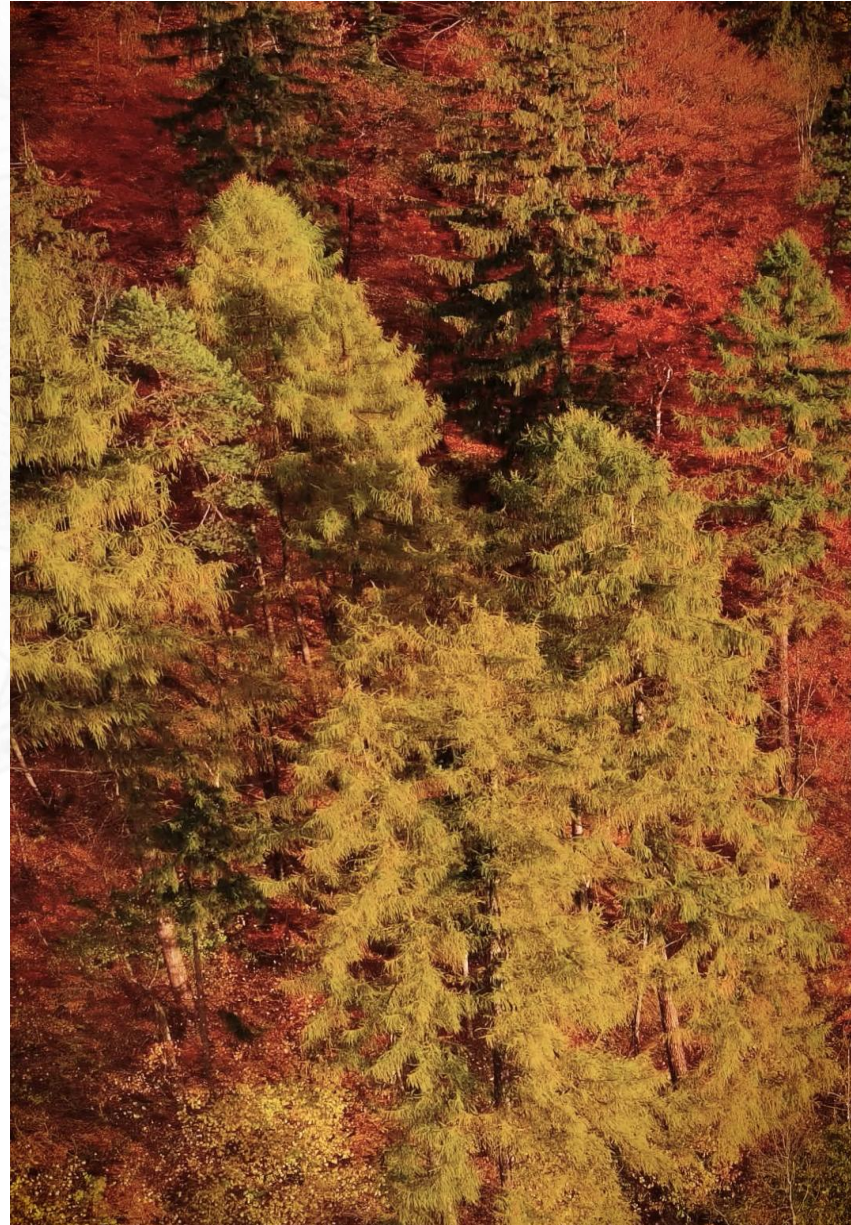




# COFFY STORE CONCEPT



# COFFY STORE CONCEPT





BE THE  
**BOLD**

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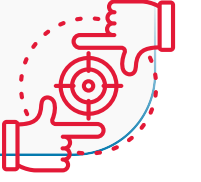
**L** ead With Purpose

**D**

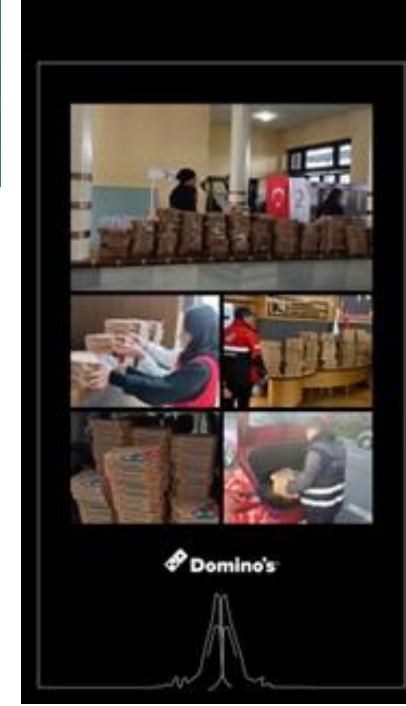




# PURPOSE: GIVING BACK TO THE SOCIETY



DP Eurasia places “value” creation at the heart of all its operations and upholds its responsibility to give back to society what it receives.





# YOUR NEIGHBORHOOD PIZZERIA IS ALWAYS WITH YOU

## During crises (earthquake)



## As a child transforms, so does the world!



TÜRKİYE EĞİTİM GÖNÜLLÜLERİ VAKFI

DP Eurasia Group's value proposition is built on fostering shared experiences, standing in solidarity, and creating lasting moments of happiness.

Domino's invests not only in today's society but also in the society of the future.

**Great  
Place  
To  
Work.®**

**Certified**

**DEC 2024-DEC 2025**

**TÜRKİYE**

**TM**

*Congratulations*  
**DP EURASIA**



BE THE  
**BOLD**

**B**

**O**

**L**

**Delicious Food**





COFFY

# TASTE DELICIOUS FOOD FROM TURKEY





# PRODUCT INNOVATION STRATEGY

## Maximize Domino's Potential

### Hero Products



**Bol Malzemos**



**Extra Cheese Bread**

### Lots of Topping Series



**Dopdolu Extra**

Number of toppings: 16



**Extravaganzza**

Number of toppings: 9



**Karışık**

Number of toppings: 5

### Differentiate from Competition



**Dom Dom**



**Volkano**



**Pan Pizza**

### Local Flavors



**Souffle**



**Ocakbaşı**



**Alaturko**

# PRODUCT INNOVATION STRATEGY

## Introduce “Good Value” and Market Share Generator Products in QSR

### Good Value



Pizzetta



Pizza XL

### Variety Products



Sandwich & Wrap

### QSR Market Share Generator



Chicken



Sauce



COFFY

# WIDE VARIETY WITH SIMPLE PRICING



Küçük Boy  
İçecekler

70 TL



Orta Boy  
İçecekler

80 TL



Büyük Boy  
İçecekler

90 TL



Orta Boy  
Soğuk İçecekler

80 TL



Büyük Boy  
Soğuk İçecekler

90 TL

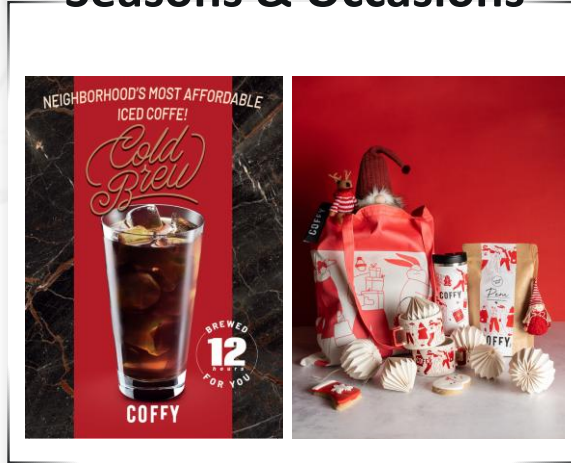


## COFFY Menu Strategy

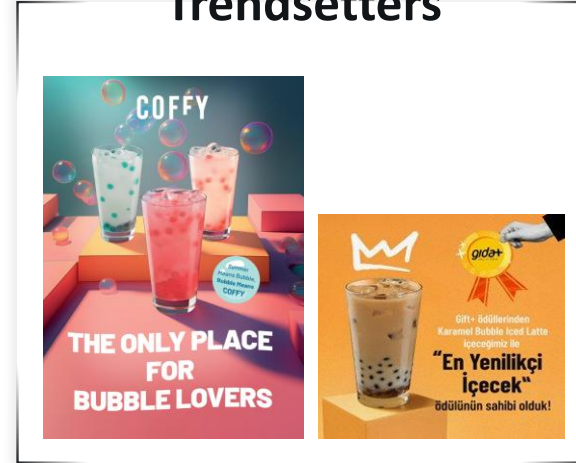
### Must-haves



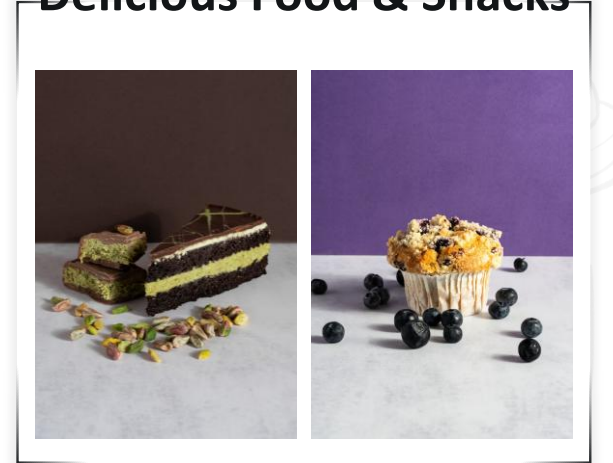
### Seasons & Occasions



### Trendsetters



### Delicious Food & Snacks





# Our Strategy: “BE THE BOLD”

Breakthrough technology



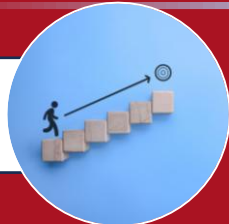
- Show Like for like growth via digital innovations
- Strengthen toolkit for franchise management

Operate with Excellence



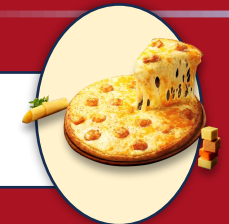
- Strong Franchise Relations to further grow in whitespaces
- Leverage scale advantage to further improve profitability
- Build on new store concepts as growth pillar

Lead with Purpose



- Grow by giving back to society & be an employer of choice

Delicious Food



- Strong Product innovations building future platforms
- Wide variety with Simple pricing

**1000+ Dominos Store**

**Top 3**  
Coffee chains in Turkey

# Immersive Food Ordering

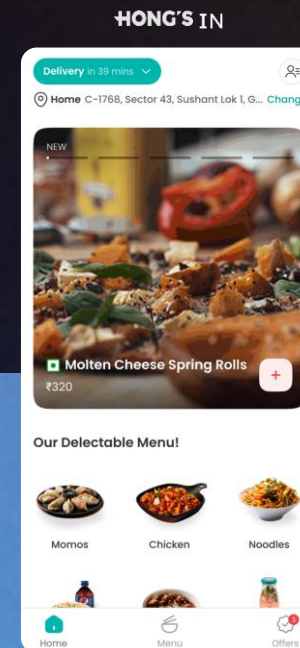
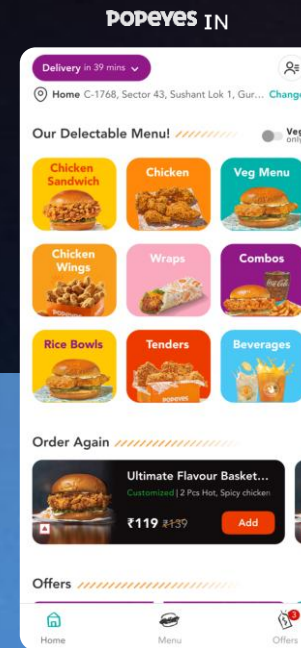
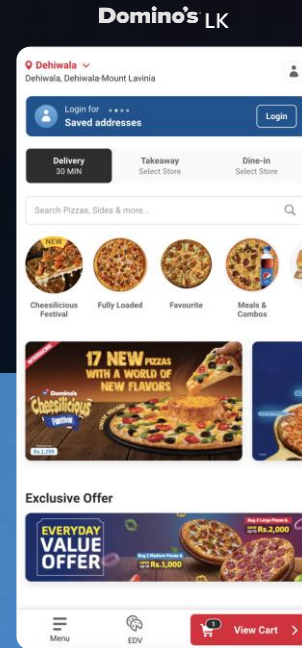
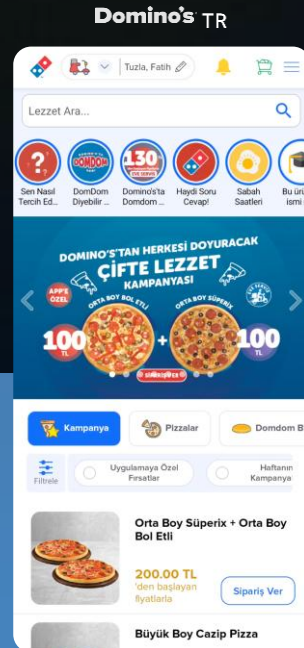
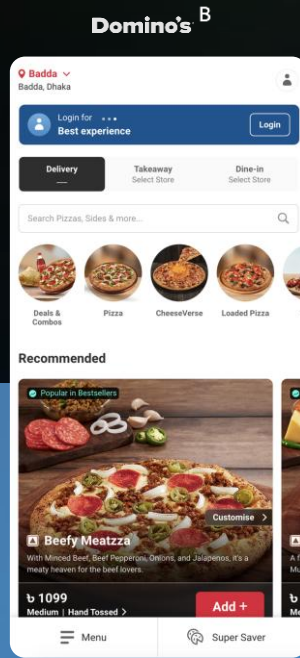
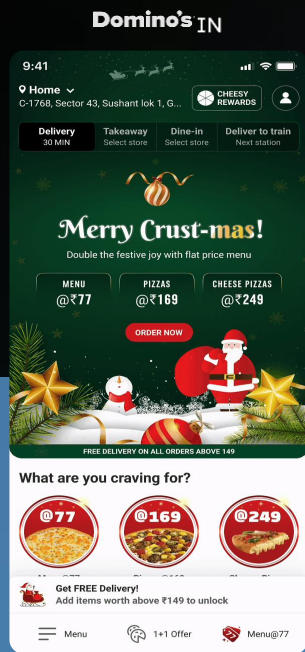
## -By Vaneet Singla

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# Immersive Food Ordering @ JFL

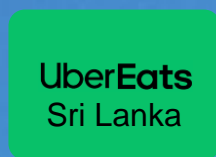
JFL is a house of brands, and has a dedicated app for each business

Brand Apps



And we have integrated with a bunch of aggregators

Aggregators





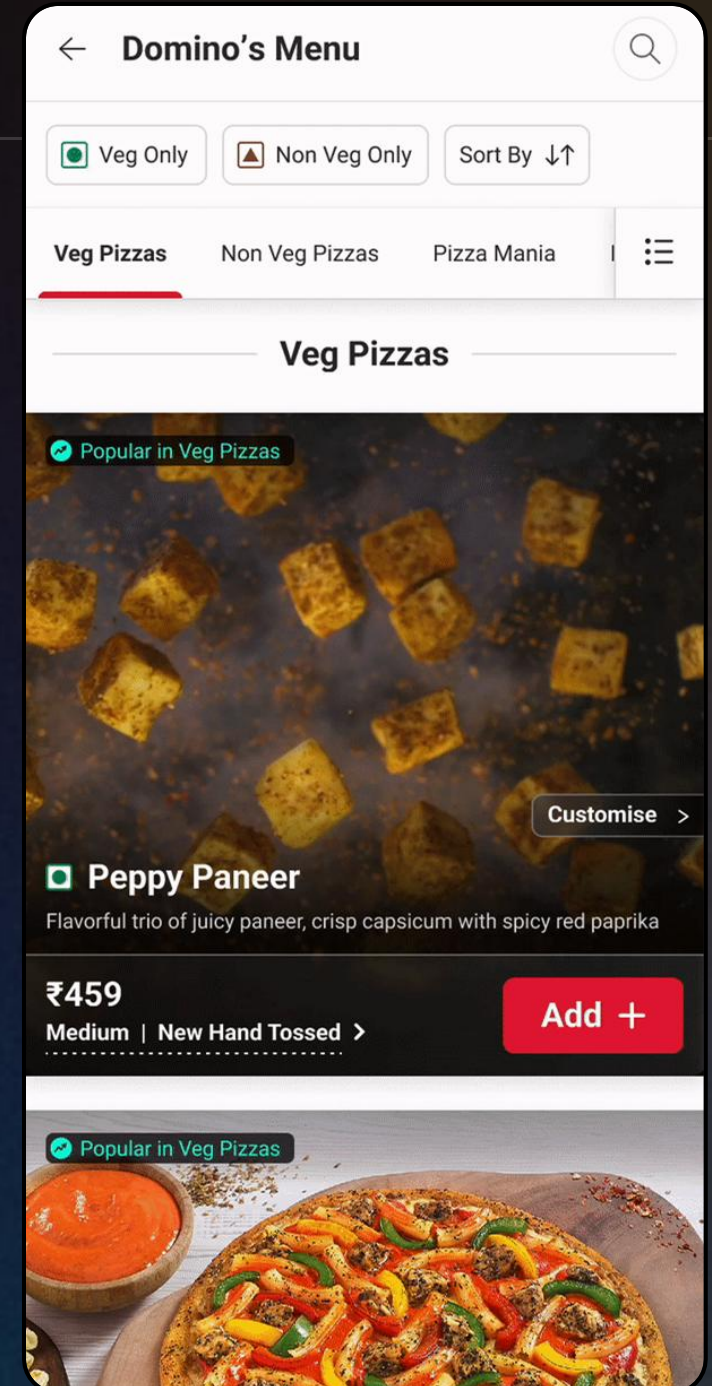
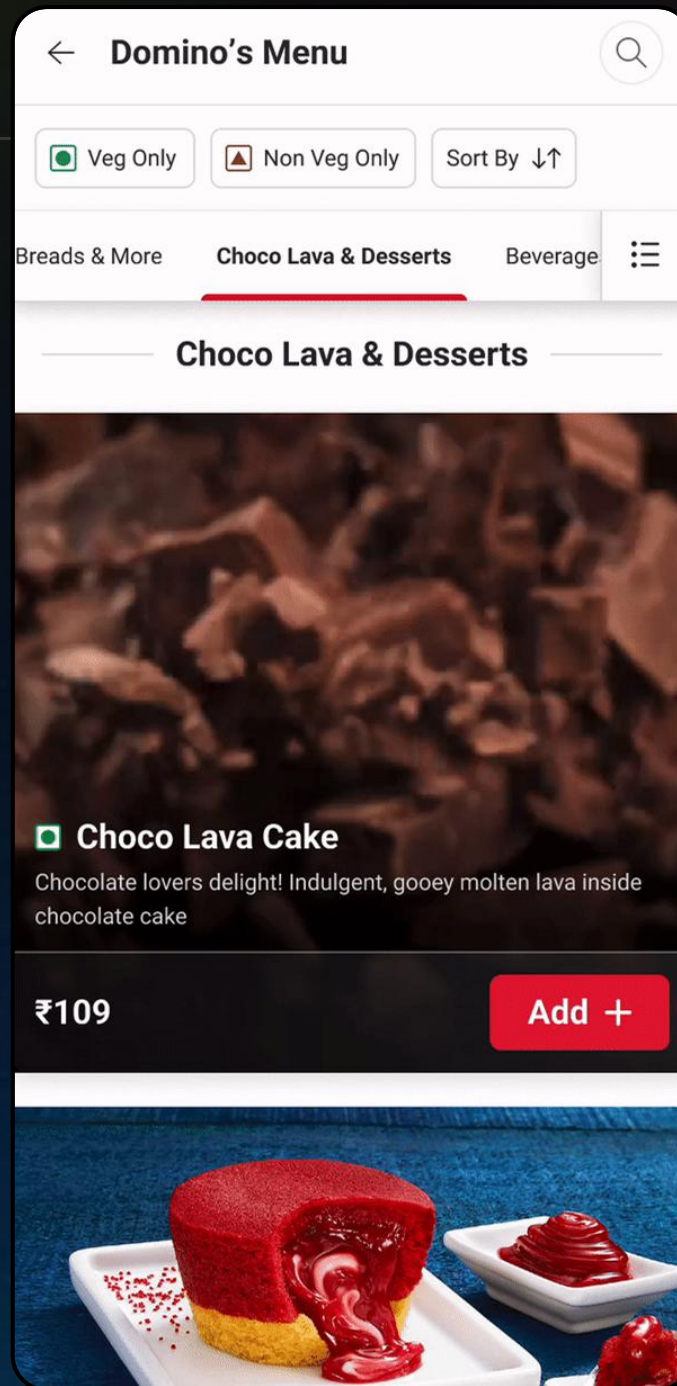
# #1: Food First Approach

Heavy focus on Images and Videos

Intent is to evoke Hunger Pangs

Every session drives positive emotion

Strategic Moat

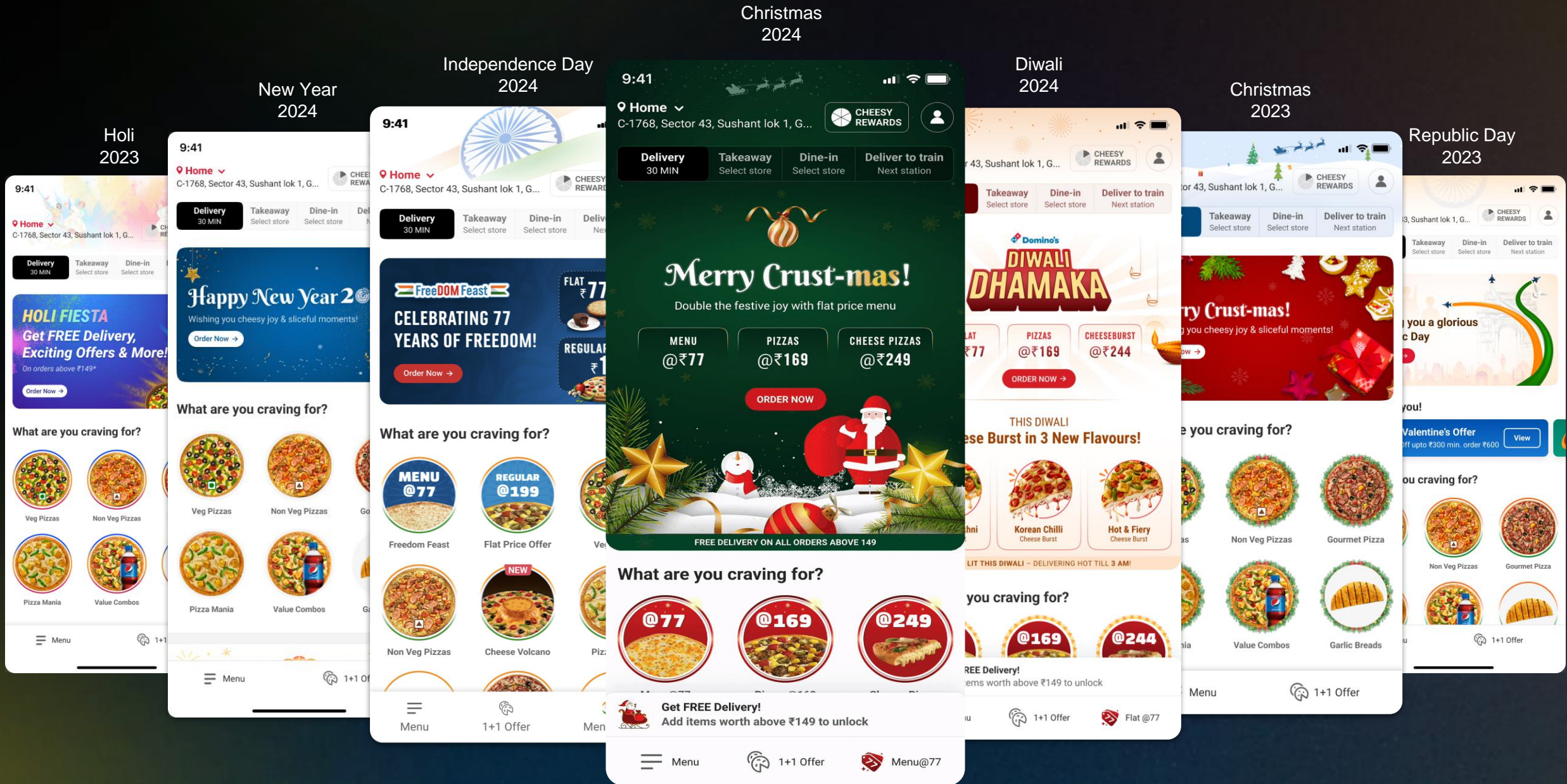




# #2: Our App is Topical & Dynamic

App looks different on each Festival

Builds long term emotional associations



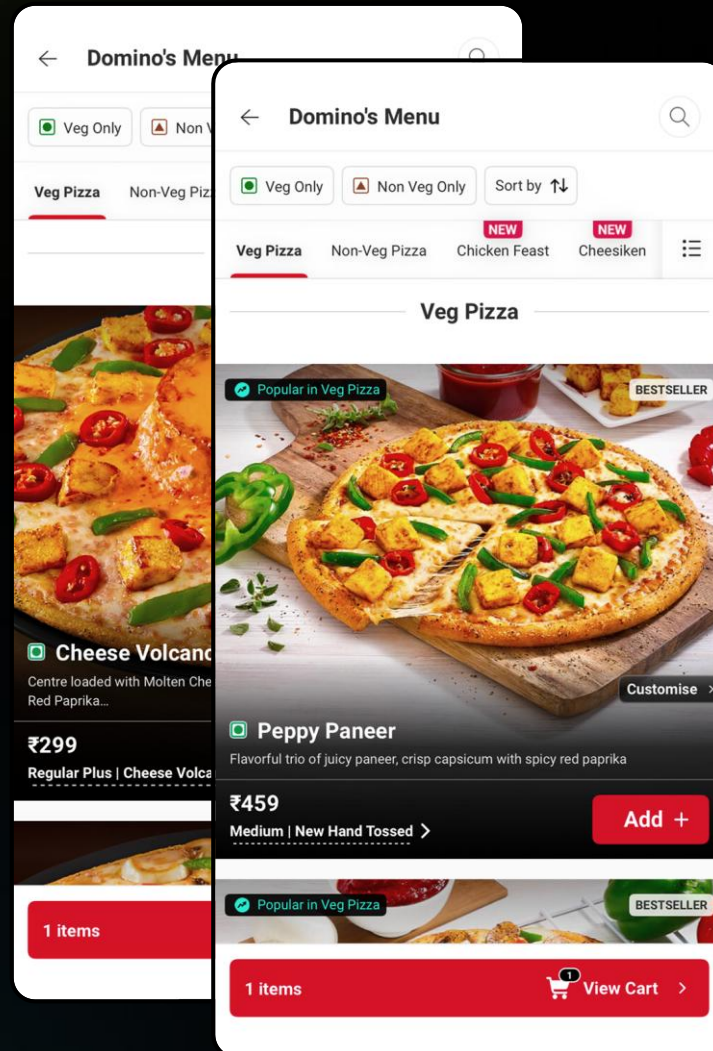
# #3: Heavy Use of Personalization driven by self-learning Data Science Models

Different Home Page at City - Store Level

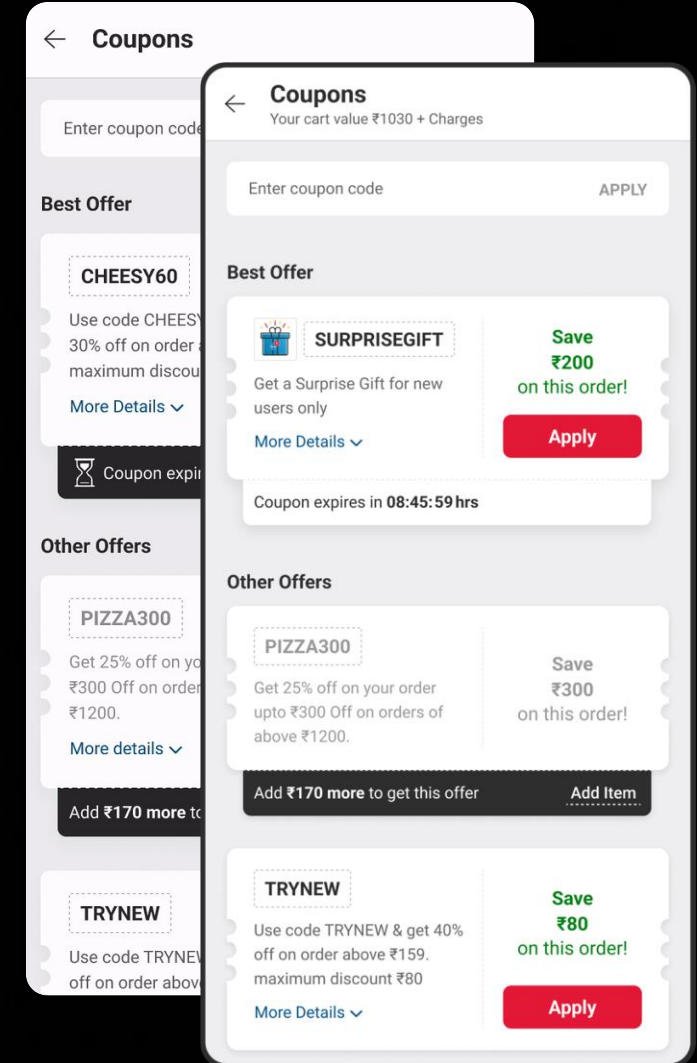
Menu Page Sequencing is personalized basis Machine Learning Models

Real time discount affinity models to optimize spends

Menu Sequence varies for each user



Offers vary basis discount affinity





# #4: India's largest Loyalty Program

31 Million Loyalty Members

75% orders from Loyalty Members



Reduced Churn



Higher Order Frequency



Higher Lifetime Value

INTRODUCING  
Domino's  
CHEESY  
REWARDS

● SAY CHEESE! ●  
FREE PIZZAS ARE HERE!!


How it works

Earn 100 Points on spend of ₹350 or more

**1 Order = 100 Points**

Points can be earned\* only on the first order of the day

Redeem a Free Pizza for 600 Points

 **100 Points**

● Simple right? Enroll now! ●

Enroll Now

INTRODUCING  
Domino's  
CHEESY  
REWARDS

● Earn points to get ●  
FREE PIZZAS!

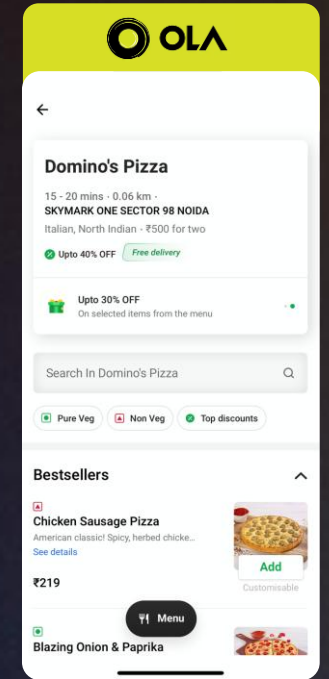
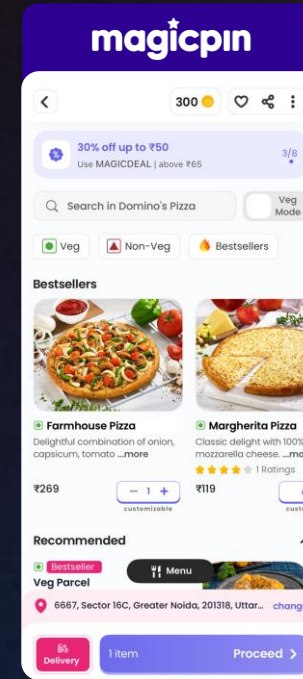
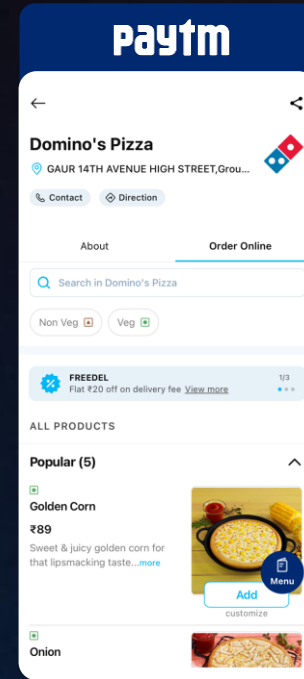
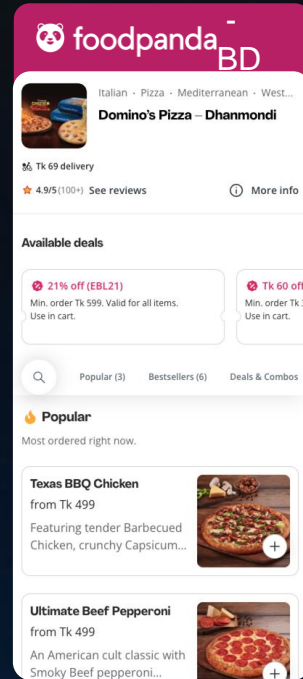
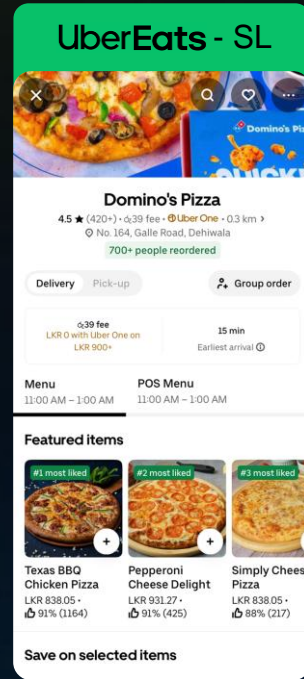
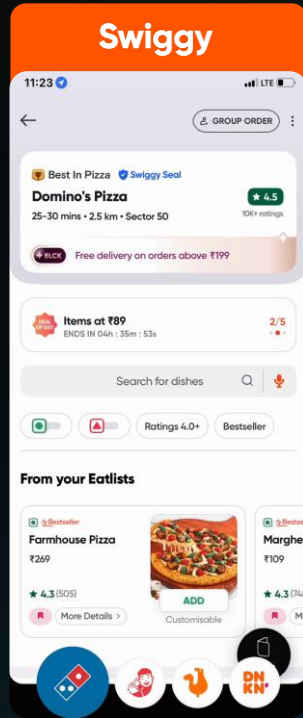
Mobile Number

+91 98765 87654

Enroll Now

1 2 3 -  
4 5 6 ,  
7 8 9 ×  
. 0 \_ >

# #5: We are where our customers are

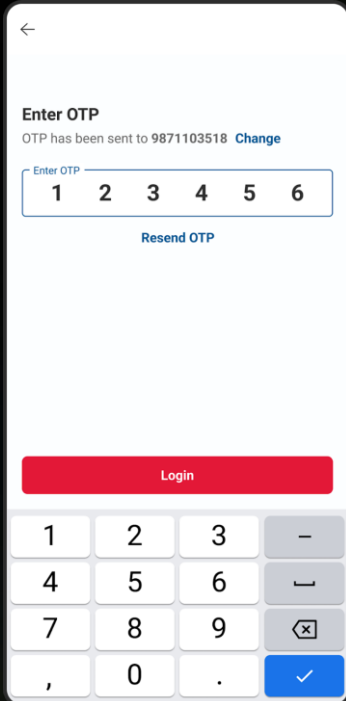


Deep integrations with all Ecosystem Players

First Food Brand to integrate directly with ONDC

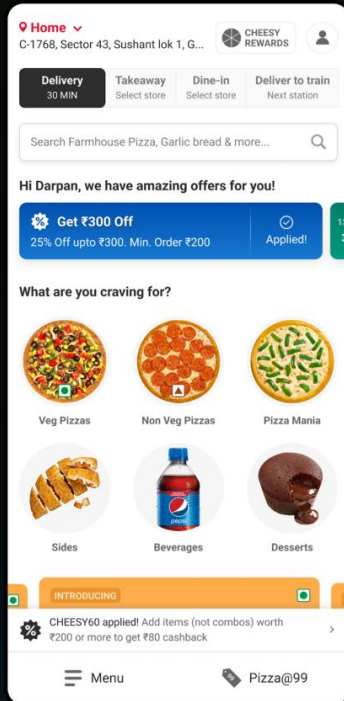


# #6: 36 Months to build the Next Gen Customer Platform



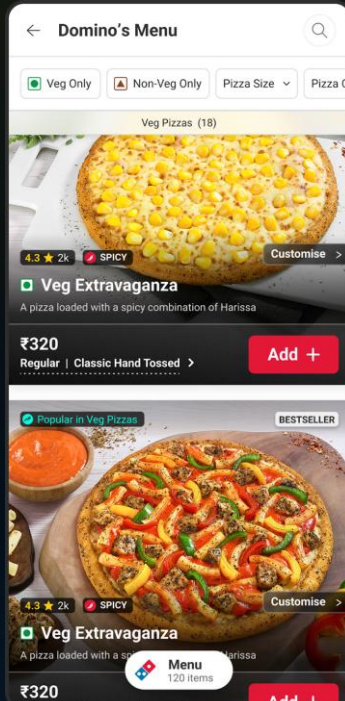
1 Click Onboarding

Single Sign On



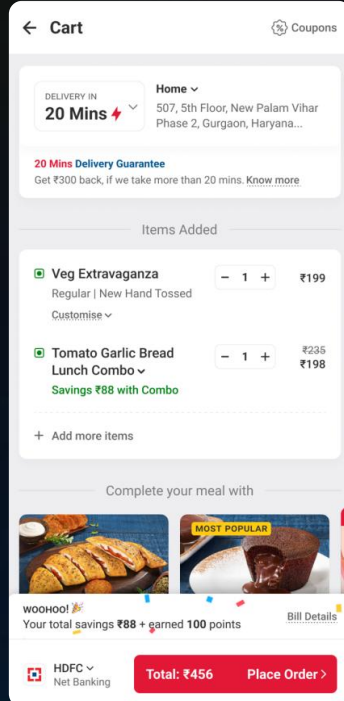
Intuitive Home

Smart Home CMS



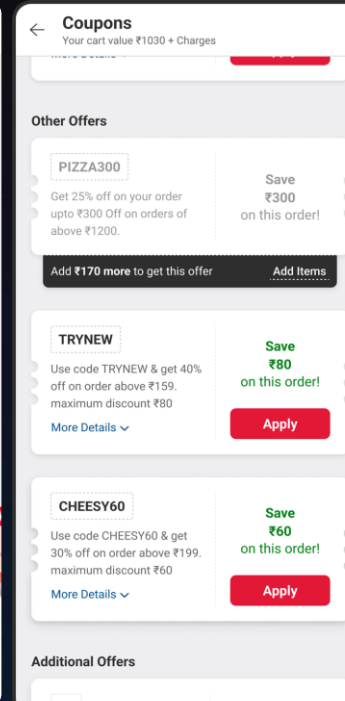
Food First Menu

Next Gen Catalog



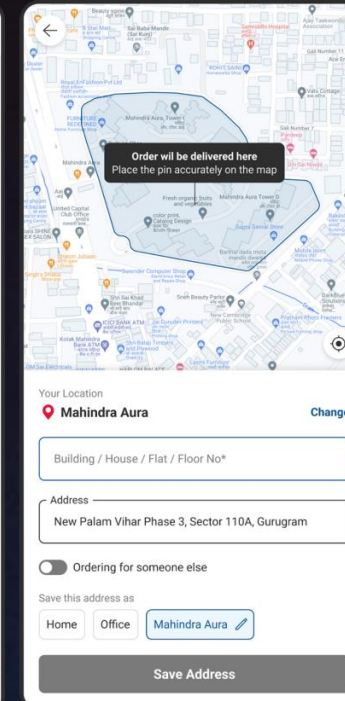
Next Gen Cart

Cart CMS



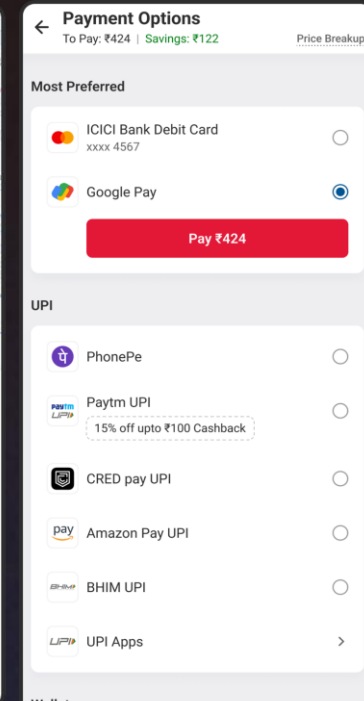
Next Gen Offers

Promo Engine



Next Gen Address

Smart Location API



Next Gen Payments

Unified Payment

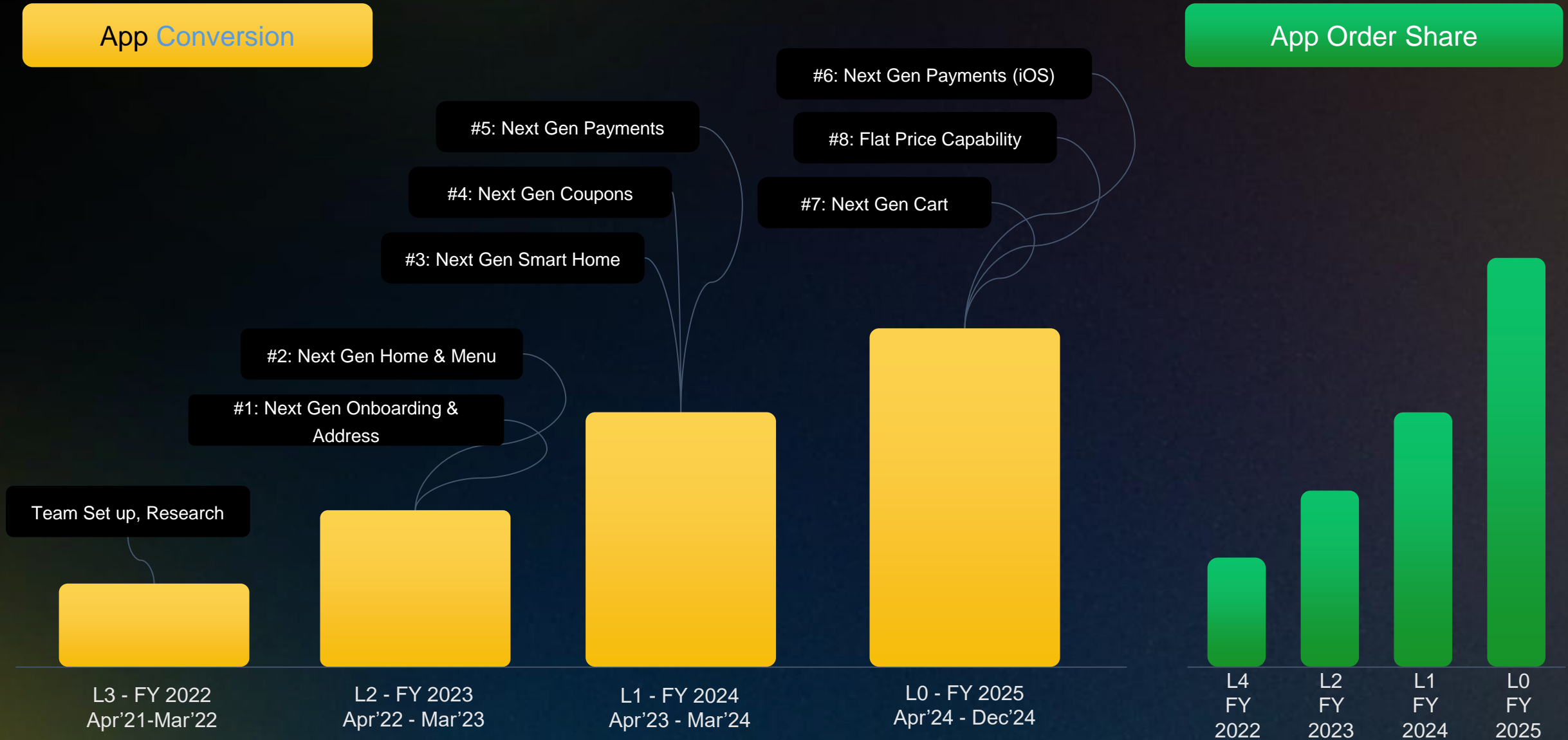
**Low Friction & Food-First UX**  
for every single touch point

**3 Weeks**  
to launch a new Brand App

**4 Weeks**  
to onboard a new Aggregator



# #7: Significant Business Benefits Accruing Already




# #8: Our apps get a lot of Customer Love

4 Million+  
Downloads per month

 Life's of Hasi Khushi

★★★★★ 29 January 2025

Every time I order I really feel good most probably some other apps come up with some consequences sometimes but ordering here always makes me comfortable and the delivery time is superb sometimes sneaking food helps me 🐱. The delivery guys are comfortable indeed.. Thanks for making us comfortable... Love it Domino's Pizza 🍕🍕

 Kushagra Gupta

★★★★★ 12 January 2025

"The Domino's app is a game-changer! The interface is user-friendly, and I can customize my pizzas exactly how I like them. The tracker feature is awesome – I know exactly when my order will arrive. Plus, the deals and coupons are unbeatable. 10/10!"

 iOS



**Domino's Pizza**  
Food & Drink

★ 4.7



**Popeyes India**  
Food & Drink

★ 4.7




**Zomato**  
Food Delivery & Dining

★ 4.7



**Swiggy**  
Food, Grocery & Dining...

★ 4.5

 Android



**Domino's Pizza**  
Food & Drink

★ 4.7



**Popeyes India**  
Food & Drink

★ 4.6



**Zomato**  
Food Delivery & Dining

★ 4.5

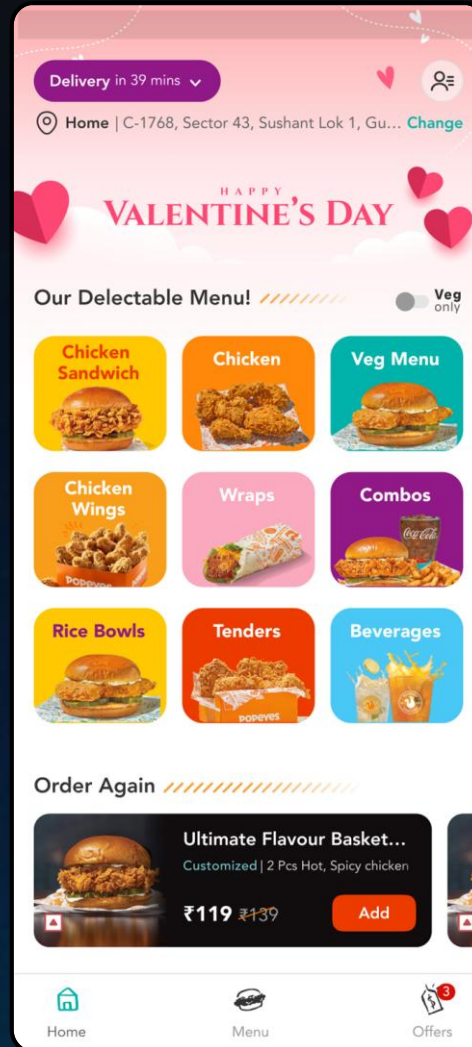
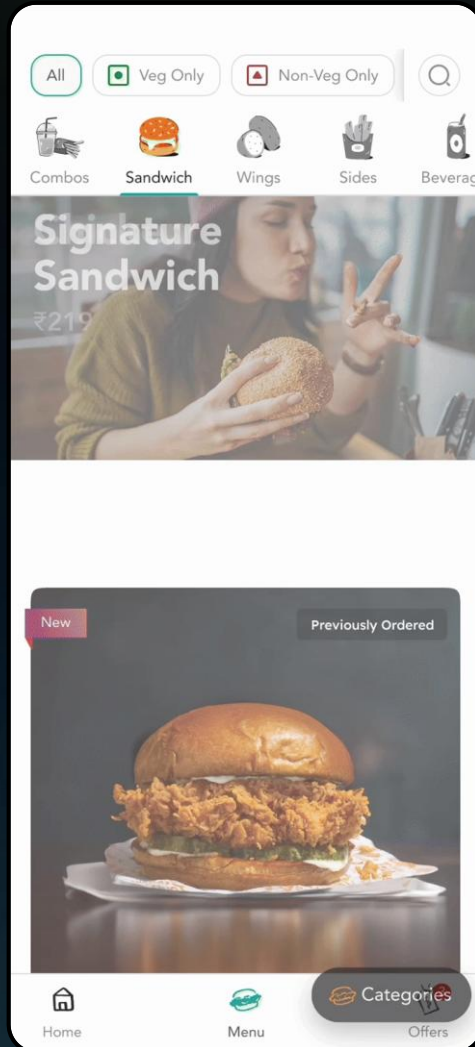
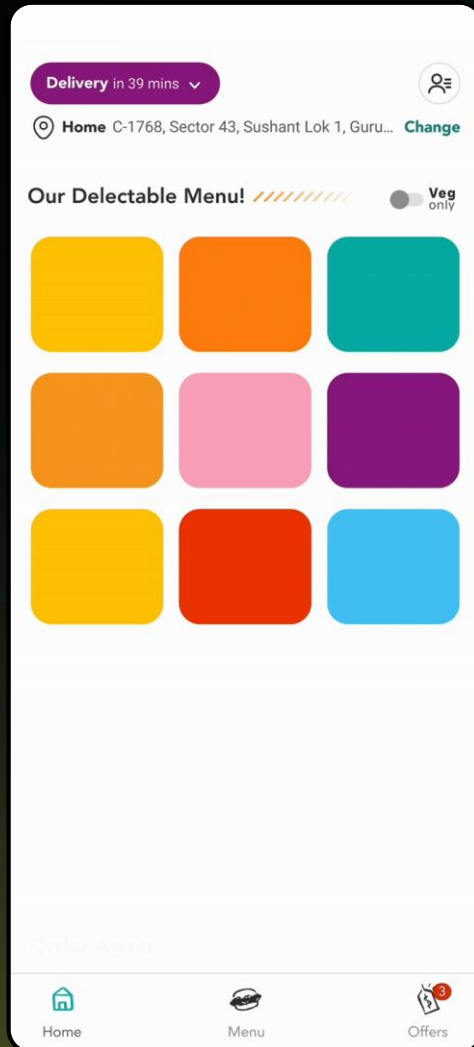


**Swiggy**  
Food, Grocery & Dining...

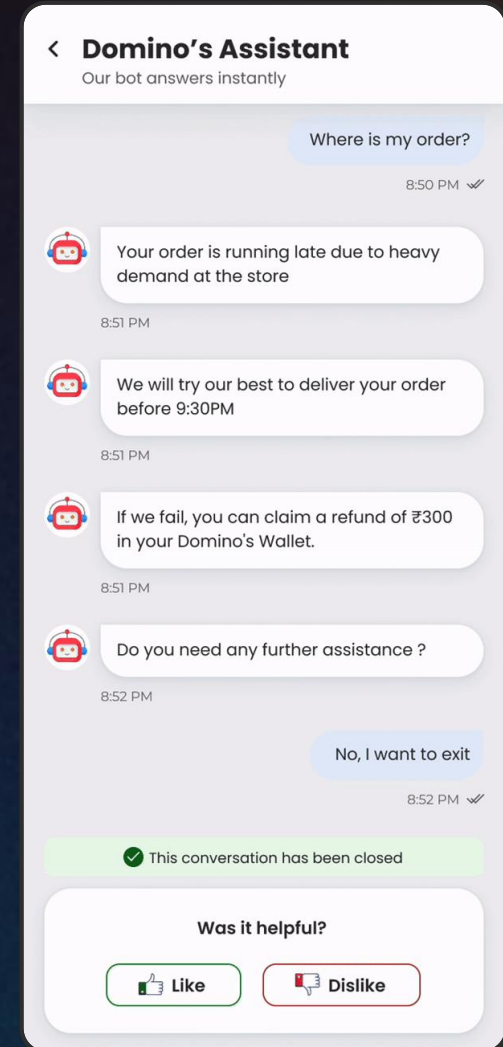
★ 4.5

# #9: Coming Soon: Next Gen Popeyes & AI Chatbot

## Popeyes Next Gen App 2.0



## AI Chat Bot





# #10: Team that made it Possible

Dedicated Product, Design, Data Science & Engineering Teams

**250+ People**

Only QSR in india to have a dedicated Product, Design, Engineering, Analytics & Data Science team

Tech Native talent, best in class processes that enable tech DNA

Companies that we exchange talent with

practo

yatra

amazon

make my trip

olx

snapdeal

airtel

INTUIT

naukri

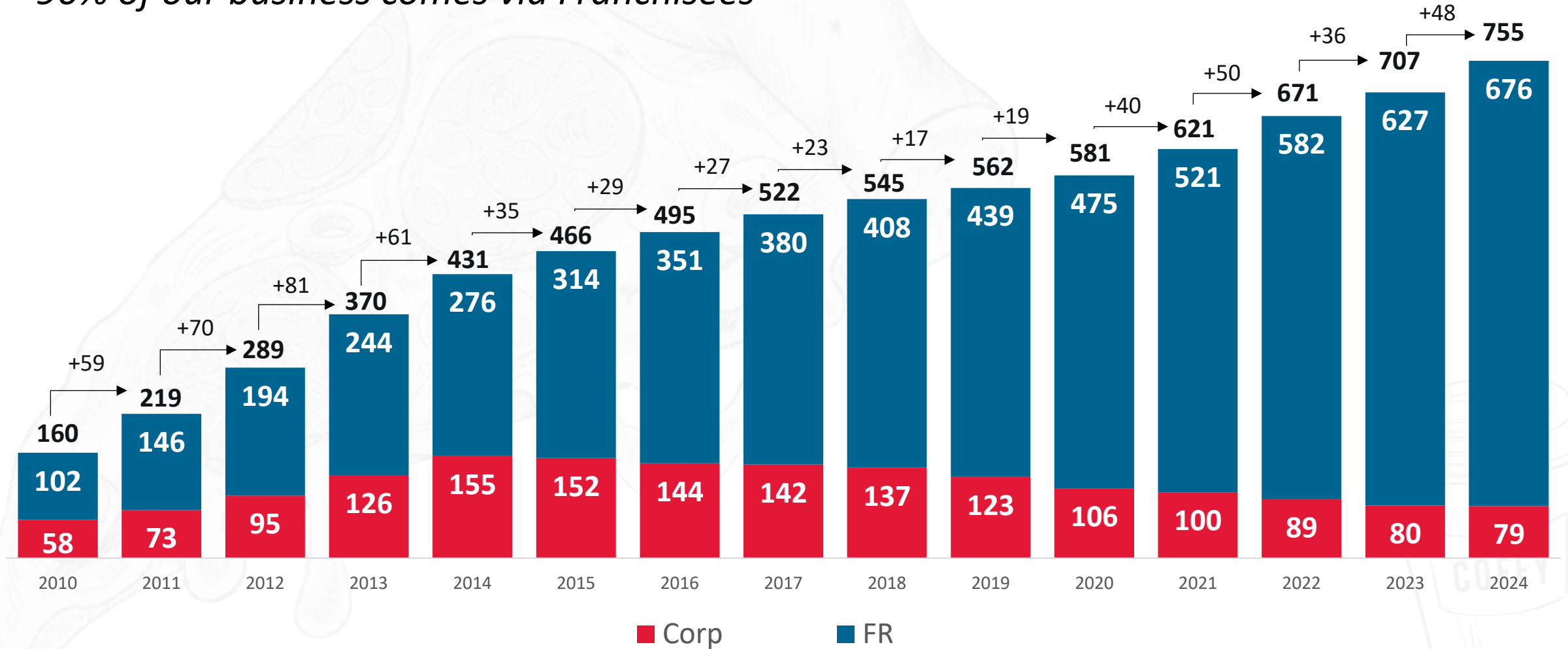


# HUNGRY FOR MORE DOMINOS TURKEY

**ASLAN SARANGA**

# RECAP: FRANCHISE-LED SUSTAINABLE GROWTH

*90% of our business comes via Franchisees*



**Domino's**

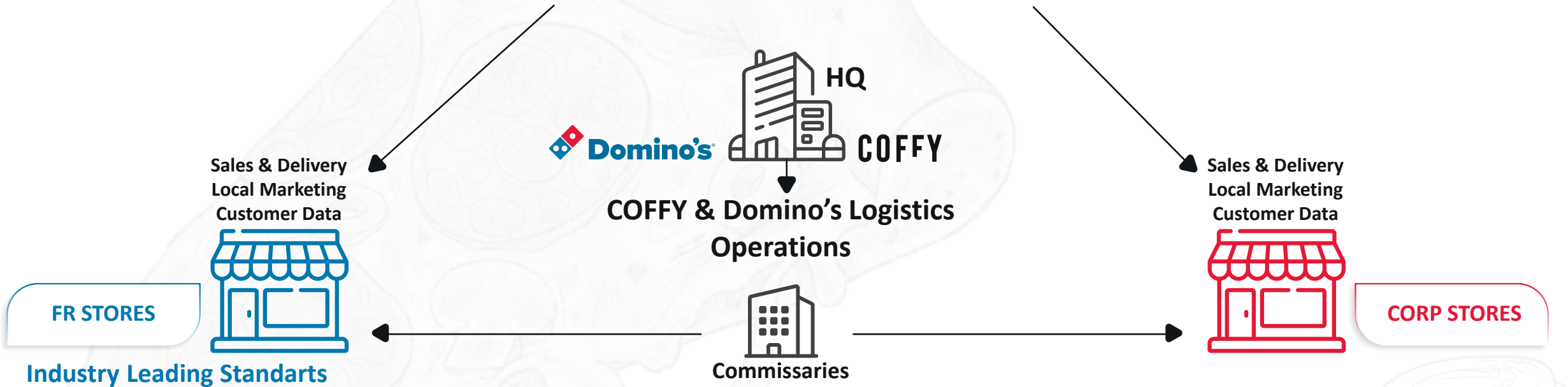
\*The franchise store figures incorporate the counts from Turkey, with an additional 10 branches in Azerbaijan and 7 branches in Georgia

**COFFY**



# FRANCHISE BUSINESS MODEL

## Centralized Strategy, Marketing & IT



**SCALABLE**



**WINNING CULTURE**



**TECHNOLOGY**



# STRONG SELECTION & PARTNERSHIP PROCESS



# TOOLS FOR ONBOARDING PARTNERS

Initial training Program

Pulse Training (Domino's only)

Local Store Marketing Support

Franchise Business Consultant Support



**COFFY**

Marketing and Brand Guidelines

Performance Review and Feedback

Continuous Training and Dev. Programs

Access to Franchise Portal



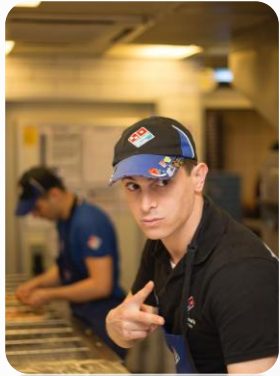
**COFFY**



# SCALING THROUGH STRATEGIC FRANCHISE MODELS

Expanding across 80 cities in Turkey with diverse franchise models, driving nationwide growth

## OPERATOR



Murathan YILMAZ  
1 Store

## HOMEGROWN

96 Homegrown FR  
193 Stores



Ilhan UZUN

FROM BEING a DRIVER to  
BEING the BIGGEST  
FRANCHISEE in the SYSTEM

19 Stores

## INVESTOR OPERATOR



Erhan YORGUN  
18 Stores



## WOMEN

75 Women Franchisees



Serpil ÖZDEN

11 stores

## JOINT VENTURE



David MADEN &  
Region Mng.  
Erkin AYDIN

9 Stores

## 2nd GENERATION



Adnan DEMİR &  
Efe DEMİR  
9 Stores

# EMPOWERING FRANCHISEE COMMITTEES: DRIVING COLLABORATION & GROWTH



## COMMITTEES

OPERATIONS COMMITTEE

NAF COMMITTEE

PRODUCT COMMITTEE

MALL STORES  
COMMITTEE

OPERATIONS  
DEVELOPMENT  
COMMITTEE

CAMPAIGN COMMITTEE

CUSTOMER SATISFACTION  
COMMITTEE

FRANCHISE REGION  
MANAGERS COMMITTEE





**Domino's<sup>®</sup>**

**HUNGRY FOR MORE**

**TRIVIA**

**By Sameer Batra**





HUNGRY FOR **MORE**

# WHAT'S OUR TARGETED BRAND POWER GROWTH AMONG GEN-Z?

- A) +300 BPS**
- B) +400 BPS**
- C) +500 BPS**





HUNGRY FOR **MORE**

# WHAT'S OUR TARGETED BRAND POWER GROWTH AMONG GEN-Z?

A) +300 BPS

B) +400 BPS

**C) +500 BPS**





HUNGRY FOR **MORE**

**HOW MANY NEW FOOD PLATFORMS WILL  
WE BUILD IN THE COMING YEAR?**

**A) 5**

**B) 4**

**C) 2**





HUNGRY FOR **MORE**

**HOW MANY NEW FOOD PLATFORMS WILL  
WE BUILD IN THE COMING YEAR?**

**A) 5**

B) 4

C) 2





**HUNGRY FOR MORE**

**WHAT WILL BE OUR STORE COUNT IN INDIA  
BY FY'28?**

**A) 2800**

**B) 3000**

**C) 3100**





HUNGRY FOR **MORE**

**WHAT WILL BE OUR STORE COUNT IN INDIA  
BY FY'28?**

A) 2800

**B) 3000**

C) 3100





HUNGRY FOR **MORE**

**HOW MANY NEW TOWNS WILL WE BE  
PRESENT IN BY FY'28?**

**A) 700**

**B) 675**

**C) 650**





HUNGRY FOR **MORE**

**HOW MANY NEW TOWNS WILL WE BE  
PRESENT IN BY FY'28?**

**A) 700**

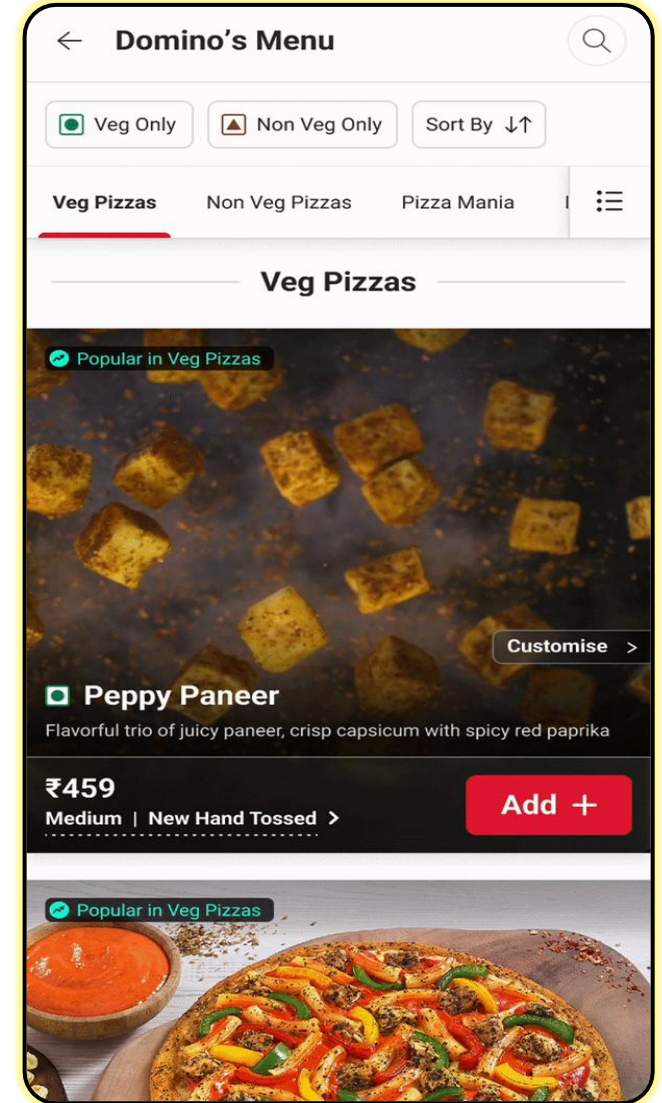
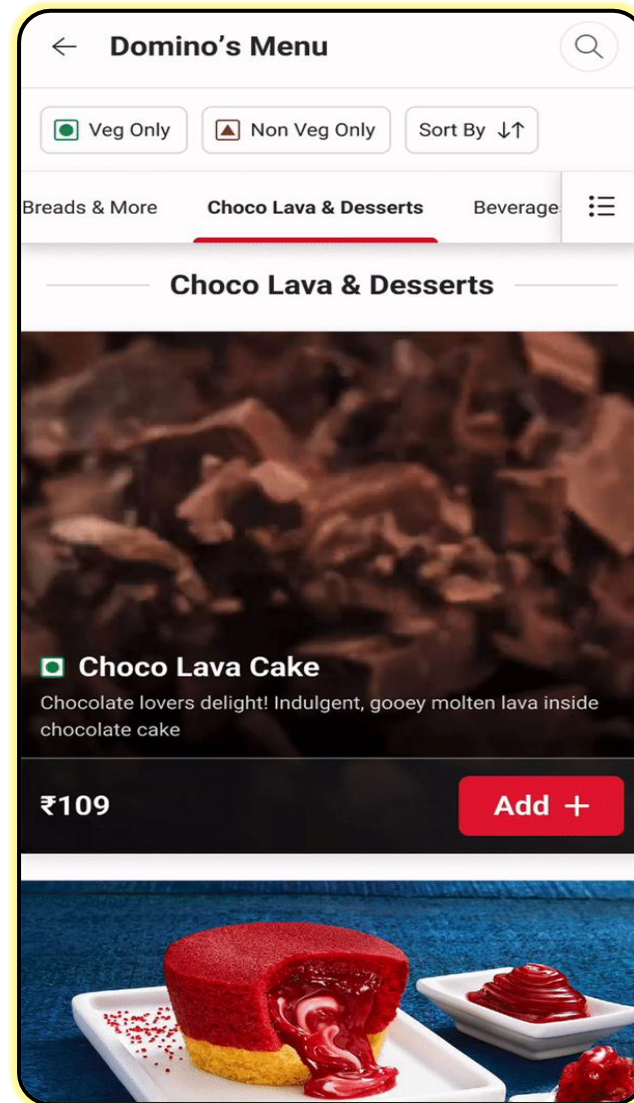
B) 675

C) 650



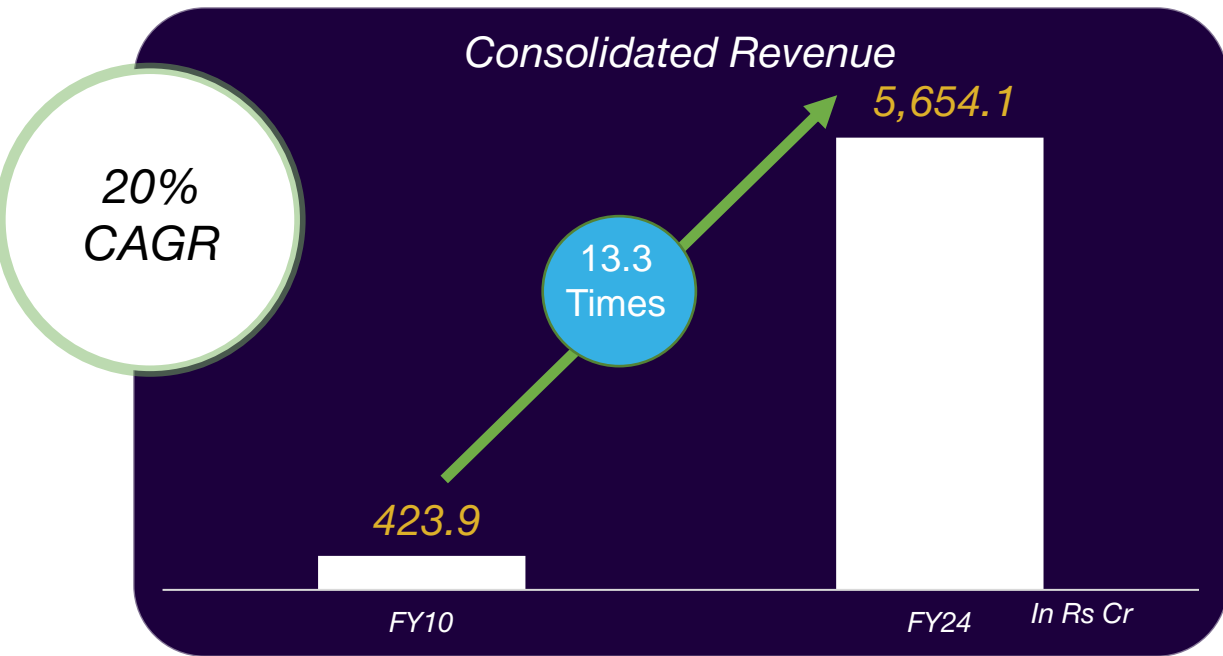


Investor Meet  
2025



STRATEGY : ACTION : IMPACT By Ms Suman Hegde

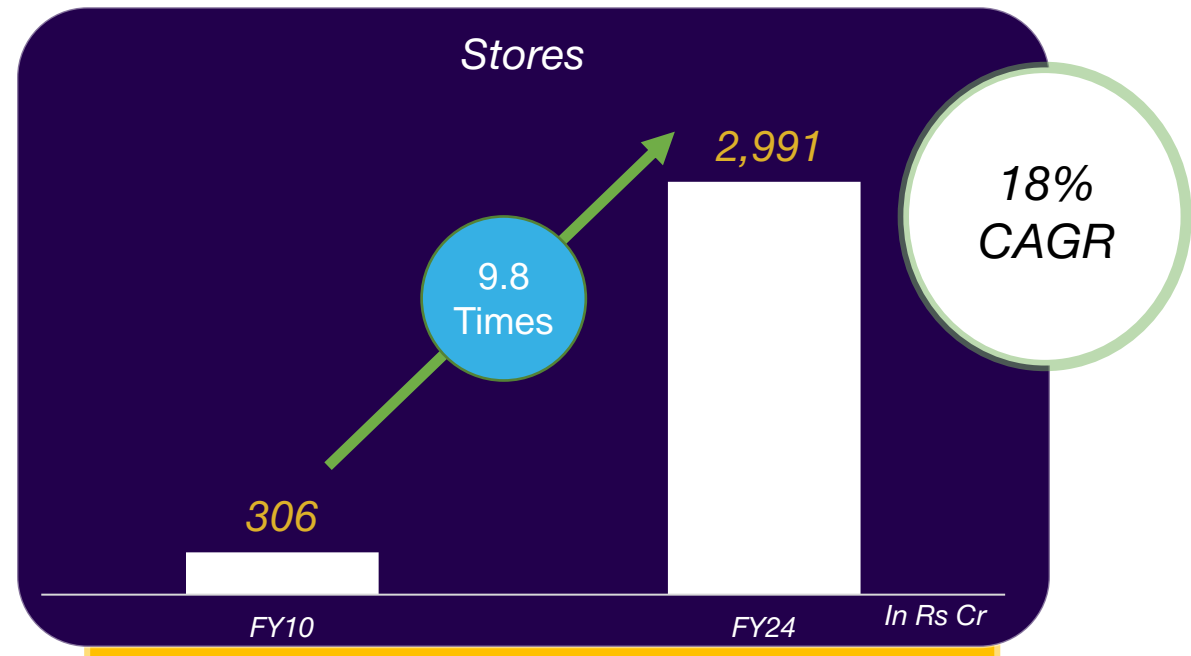




*Outpacing Competition (YTD FY25)*

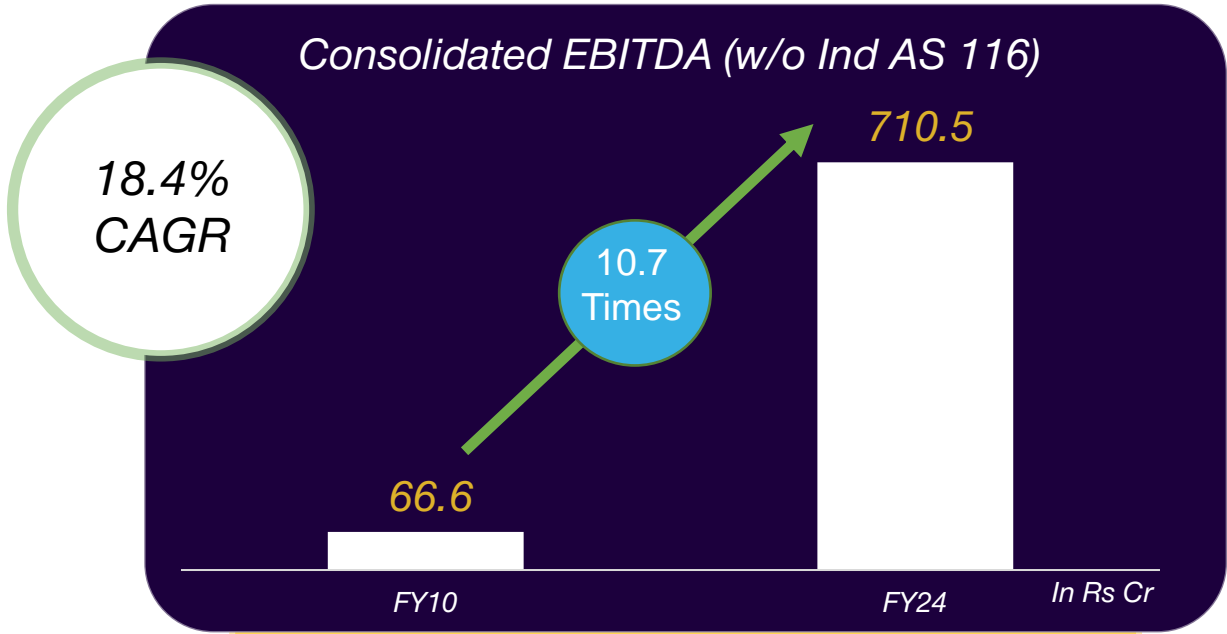
LFL at 12.5%

Standalone Revenue Growth at 13%

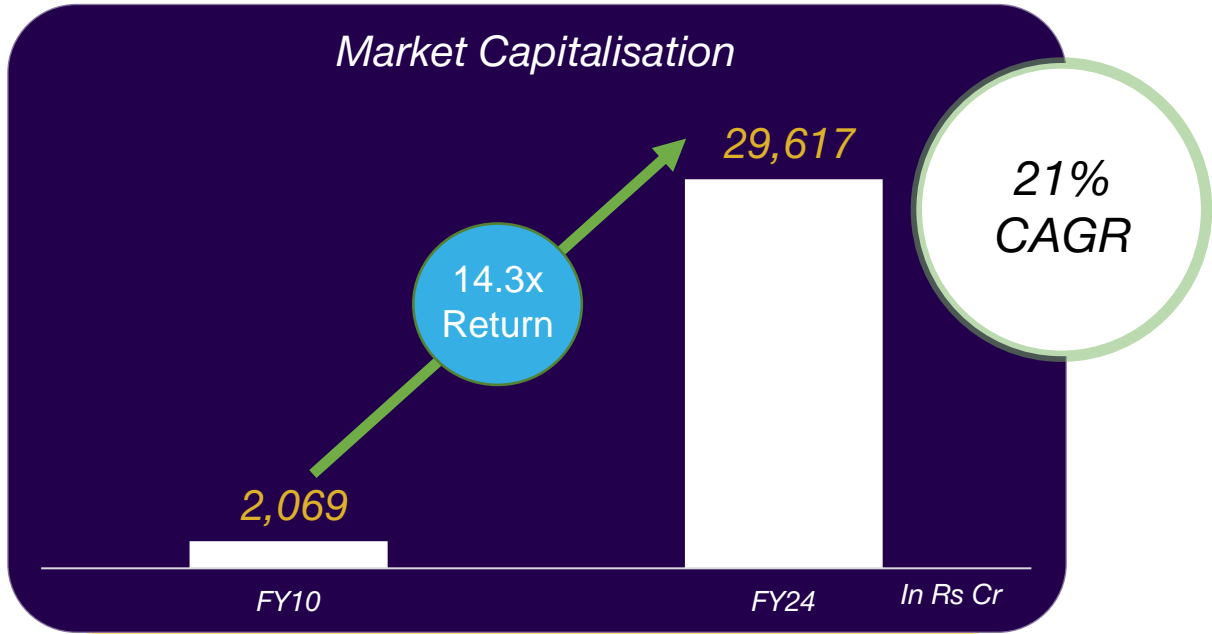


*Setting the Pace*

1st Market ex. US to cross 2000 stores  
+45 new cities in FY 25 & counting...



*Dominos India EBITDA margin highest in the Industry  
14.6%*



*Market Cap +15000 Cr. YTD  
> Market Returns in Yr.*

AI: Powering Operational Excellence



Doubling down on Dominos



Values drive Value



Integrated Supply Chain creating Value



Customer First Thinking



FOOD PLATFORMS  
Innovations – the secret sauce





*Market Beating Revenue  
Growth*



*GROWTH  
ACCELERATION*

*Drive Absolute Profit  
Growth*

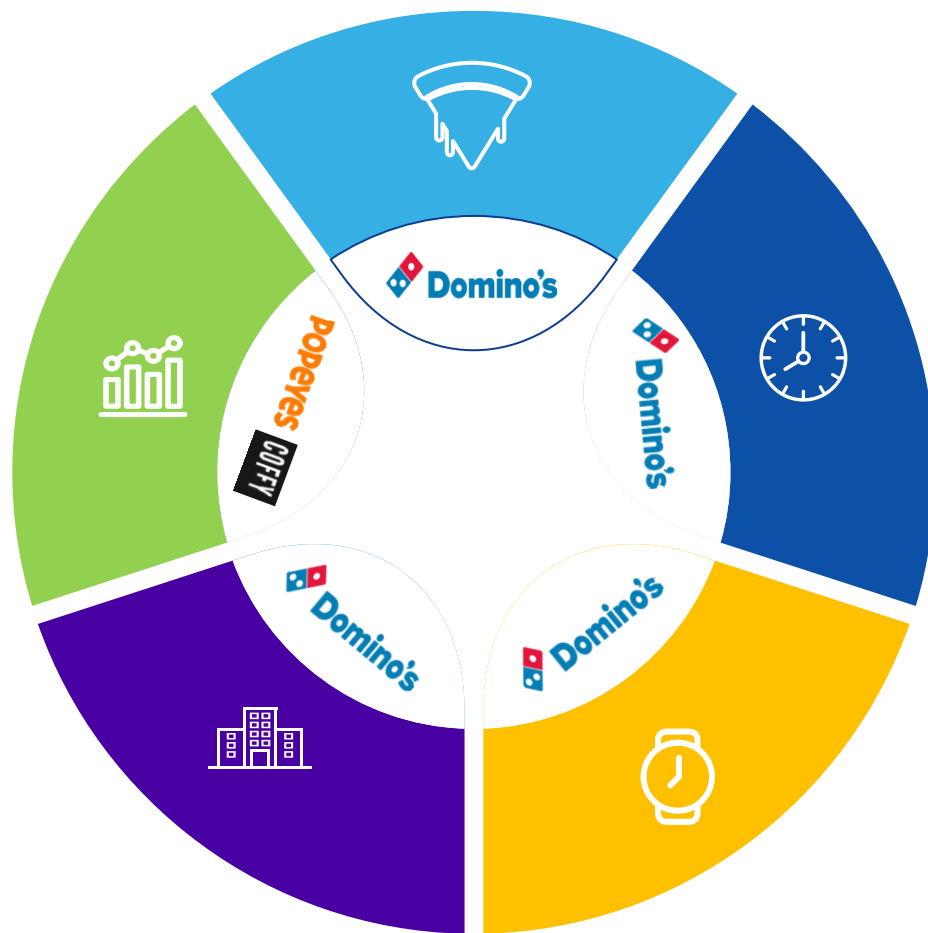


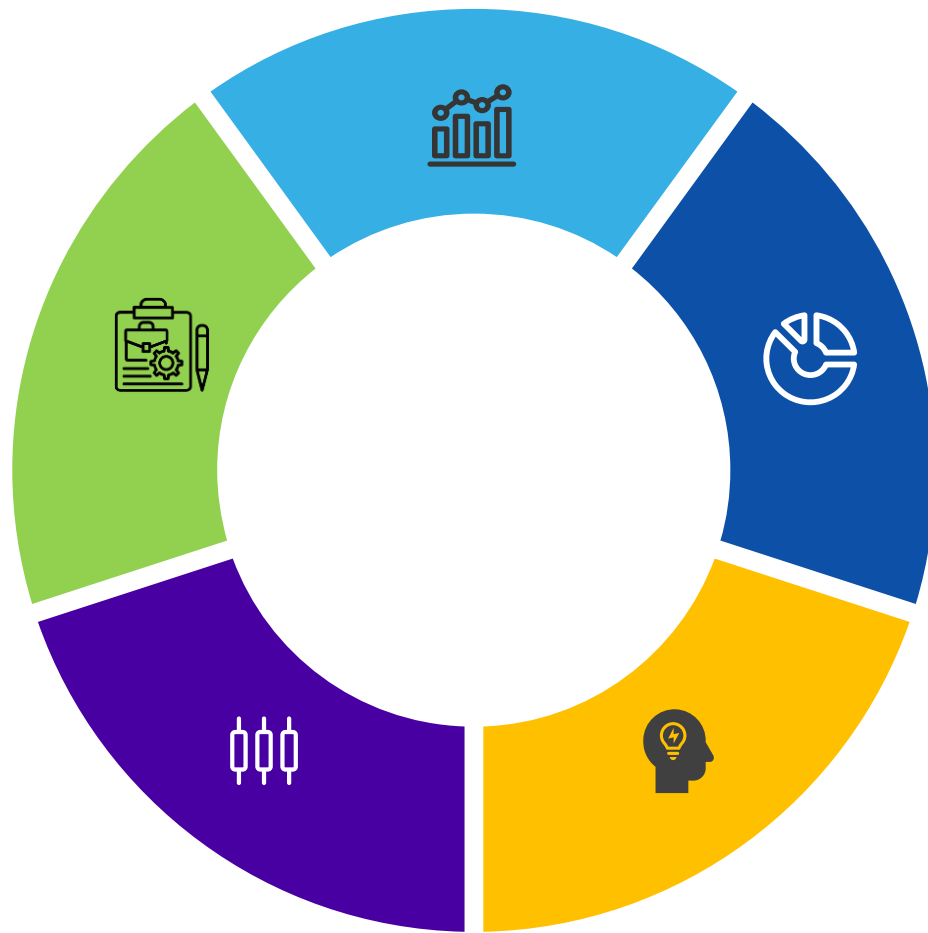
*PROFIT  
MAXIMISATION*

*Future – Fit  
Tech Investments*

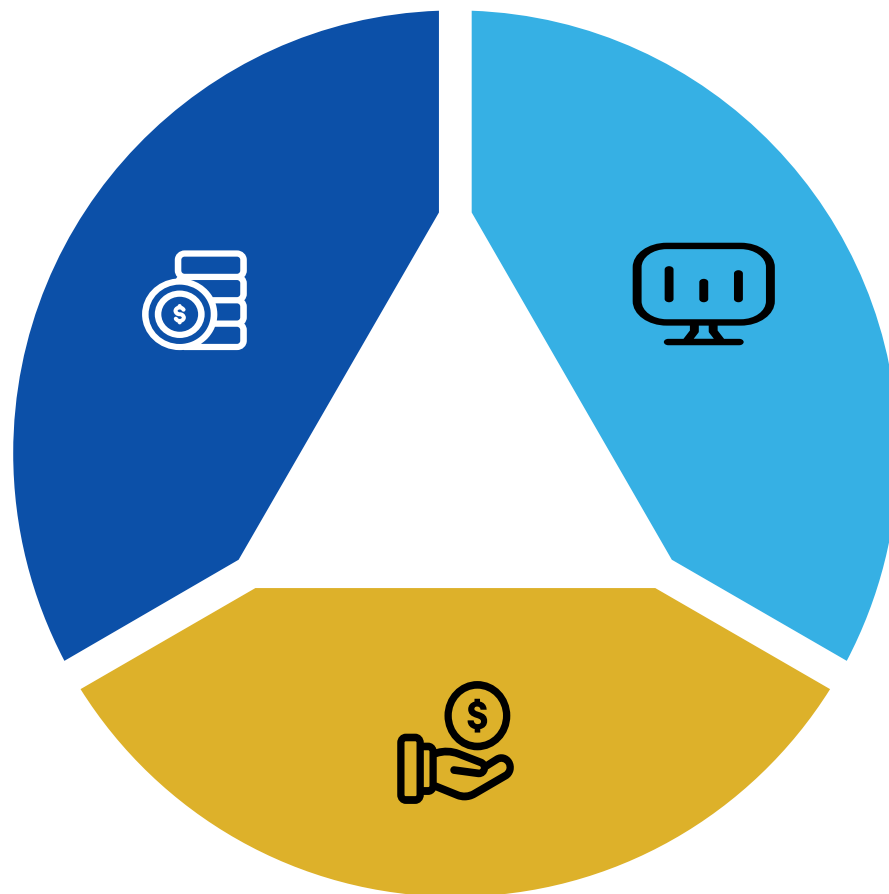


*SMART  
CAPITAL ALLOCATION*









*Market Beating Revenue  
Growth*

*Double Digit Revenue CAGR  
3000+ Dominos Stores*



**GROWTH  
ACCELERATION**

*Drive Absolute Profit  
Growth*

*Double Digit Profit CAGR  
+200 bps Margin Improvement*



**PROFIT  
MAXIMISATION**

*Future – Fit  
Tech Investments*

*Free Cash Flow  
Maximisation*



**SMART  
CAPITAL ALLOCATION**

Thank You