

Future Vision of Kikkoman Group  
「Global Vision 2020」

~ Making Kikkoman Soy Sauce a Truly Global Seasoning ~

Kikkoman Corporation

Updated in March, 2009

# What is Global Vision 2020?

In 2008, on the occasion of the 50th anniversary of its full-scale sales and marketing entry into the U.S. market, Kikkoman Corporation adopted “Global Vision 2020” as its vision for the future of the Kikkoman Group and the basic strategy for reaching those goals by 2020.

# Global Vision 2020 – Goals

## 1. Make Kikkoman soy sauce a truly global seasoning

Promote the use of soy sauce throughout the world, fusing it with food cultures in each region to create new and delicious flavors

## 2. Be a company that supports healthy lifestyles through food

Use the technology and know-how we have accumulated in brewing and selling soy sauce to promote a healthy lifestyle through food

## 3. Be a company whose existence is meaningful to the global society

Continue to be a company that people around the world want to see last forever

# Global Vision 2020 - Basic Strategy

## 1. Global Soy Sauce Strategy

Spread throughout the world Kikkoman's highly profitable overseas soy sauce business model.

## 2. Global Strategy for Oriental Food Wholesale

Strengthen Kikkoman's oriental food wholesale and distribution system, taking advantage of the Japanese-food boom overseas.

## 3. Del Monte Business Strategy

Strengthen Kikkoman's Del Monte business in Japan as well as in Asia\* and the Oceania region.  
*\*excluding the Philippines*

## 4. Health-related Business Strategy

Expand Kikkoman's health-related business through various measures like M&A.

# Basic Strategy (1) Global Soy Sauce Strategy

	2006	2020
Sales	115 billion yen	300 billion yen
Quantitative sales volume	450,000KL (6% share by volume)	1,000,000KL (12% share by volume)

No.1 Share by Value

### Europe

- continue double-digit growth
- stimulate new demand in existing major markets
- develop new markets in Russia and Central and Eastern Europe

### Japan

- mature phase
- promote high value-added products
- expand soy sauce derivative products

### North America

- a period of stable growth
- launch high value-added products
- develop foodservice and industrial markets

### Africa

- potential market

### Asia

- promote use of naturally brewed soy sauce
- develop markets in China and India

### South America

- potential market

# Expansion of Soy Sauce Manufacturing Centers (2020)

## Europe

- Establish a second plant in Europe
- Develop markets in Africa and Middle East

## North and South America

- Establish a third plant in the USA
- Establish a plant in South America

Europe (2nd Plant)

China

North America (3rd Plant)

Southeast Asia/Oceania

South America

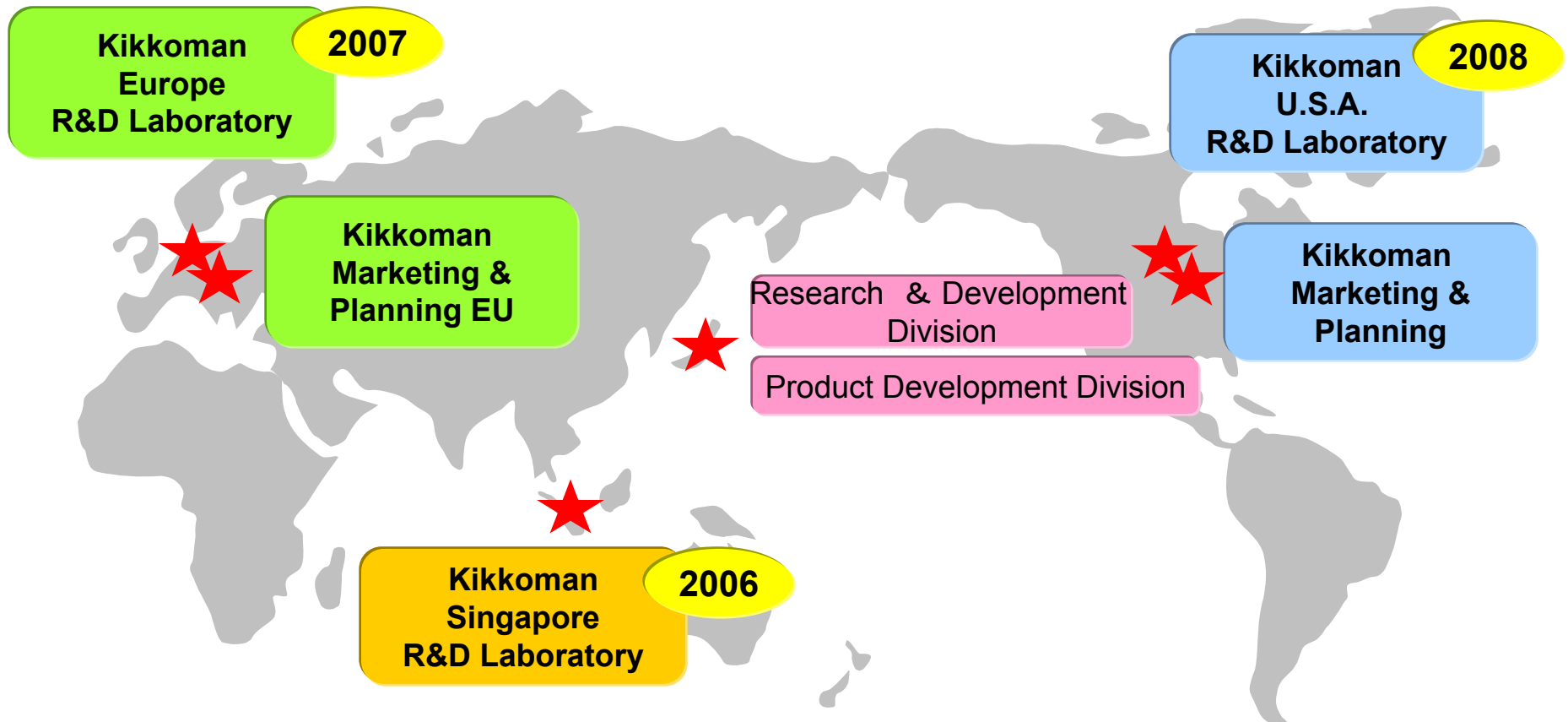
## Asia and Oceania

- Strengthen production capability including JV with local companies

● Existing Plants

□ Possible Sites

# Global R&D Network

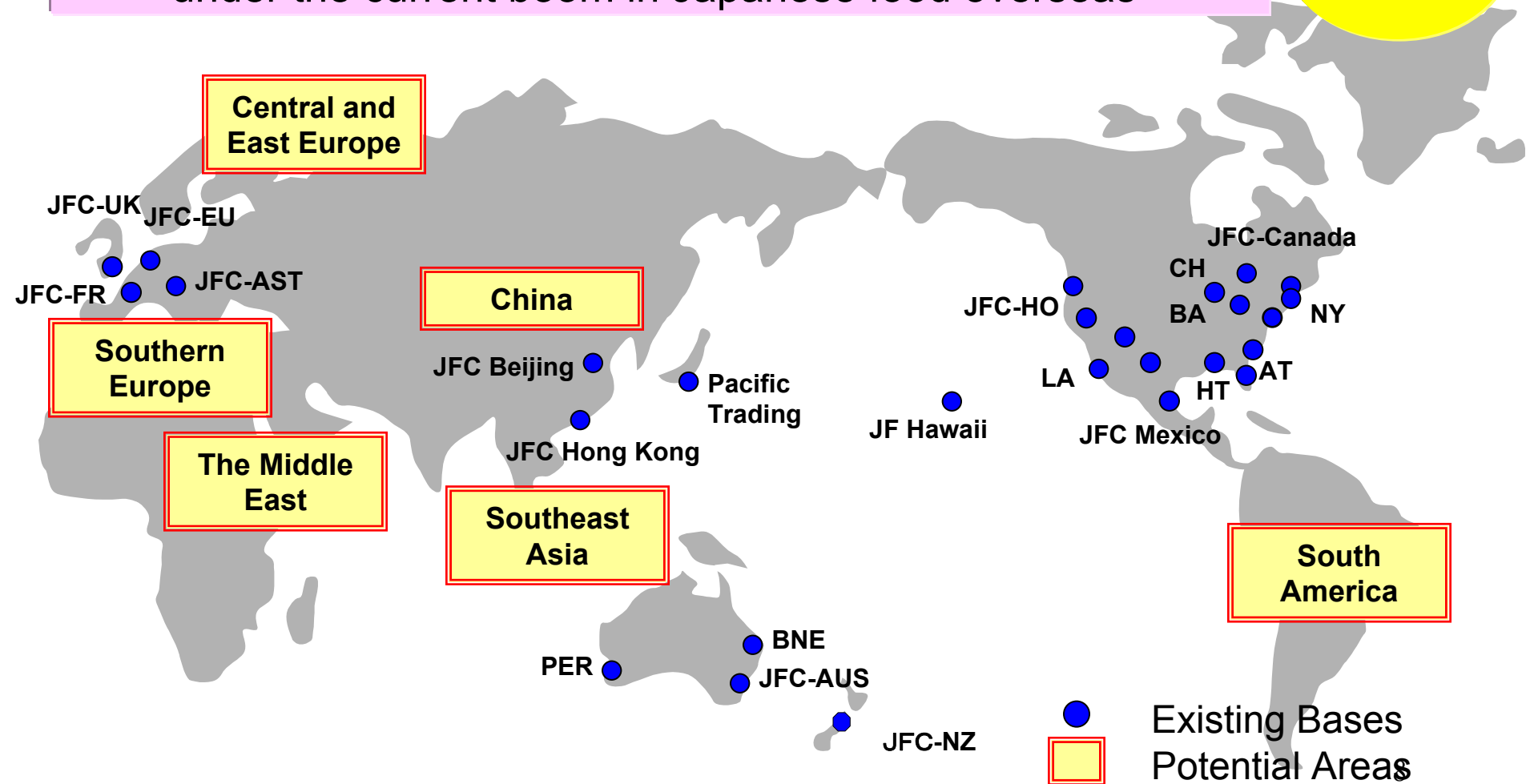


# Basic Strategy (2)

## Global Strategy for Oriental Food Wholesale

Expand global network  
under the current boom in Japanese food overseas

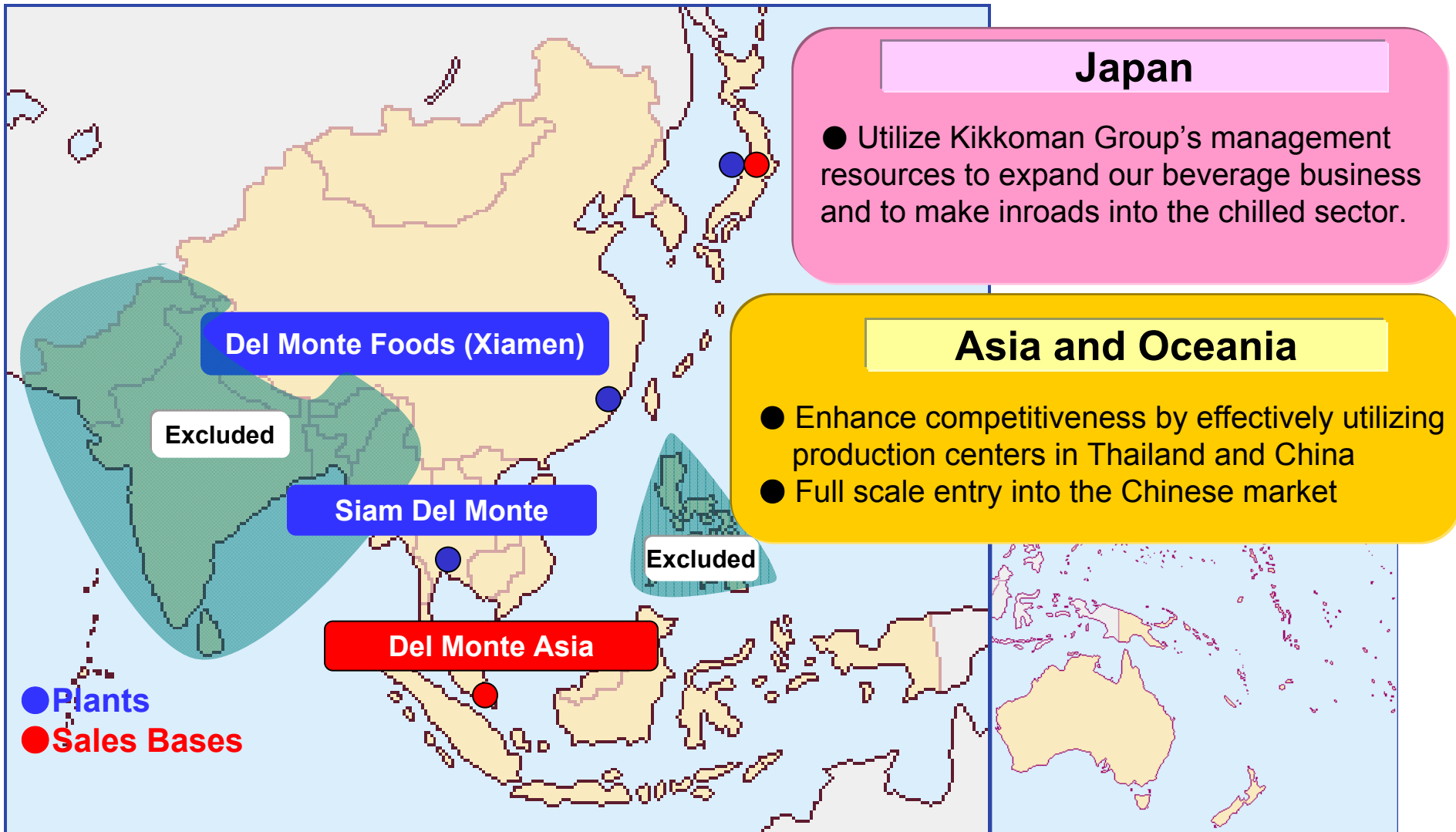
No.1 Oriental Food  
Wholesale



# Basic Strategy (3)

## Del Monte Business Strategy

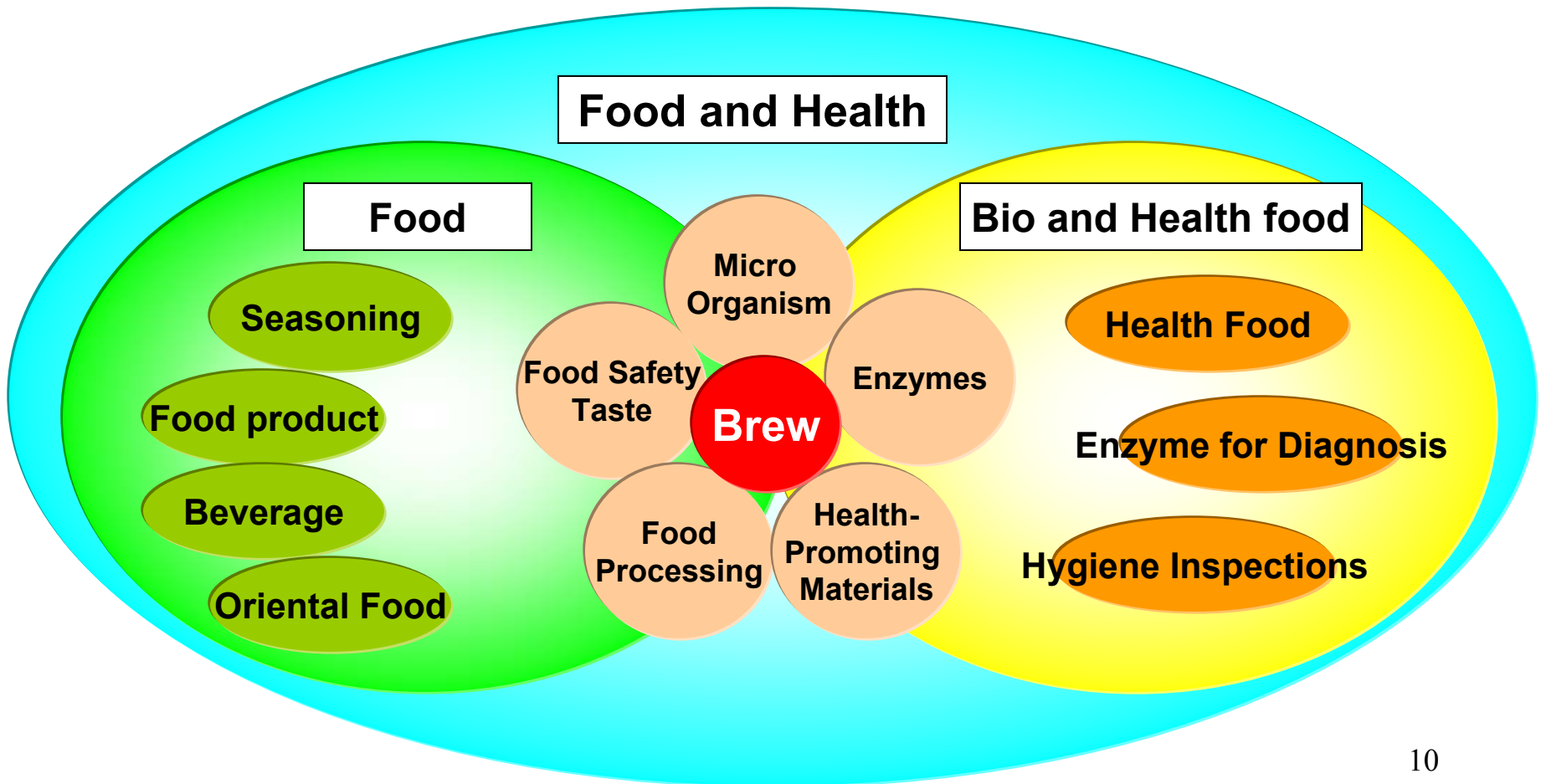
Expand the Del Monte business at home and in Asia & Oceania



# Basic Strategy (4)

## Health-related Business Strategy

Expand the biotechnology and health food businesses through M&A



# Global Vision 2020 - Concept

## Goals

**Make Kikkoman soy sauce a truly global seasoning**

**Be a company that supports healthy lifestyles through food**

**Be a company whose existence is meaningful to the global society**

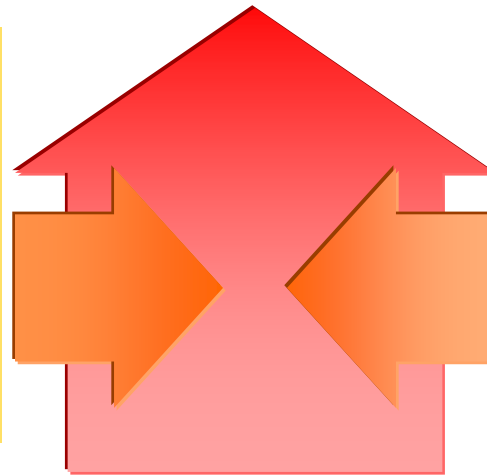
## Basic Strategy

**Global Soy Sauce Strategy**

**Global Strategy for  
Oriental Food Wholesale**

**Del Monte Business Strategy**

**Health-related Business Strategy**



## Organization/Structure

**Global HR strategy**

**Global financial strategy**

**Global R&D strategy**

## Sources of corporate value

**Overseas  
soy sauce  
business model**

**Global network**

**R&D and  
technological  
capabilities**

**Brand Strength**

**Corporate Social  
Responsibility**

Thank you