

## *I. Corporate Strategic Overview in Fiscal 2009*

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*Chairman and CEO*

## *Topics for This Presentation*

*1. Forecast for Fiscal 2009*

*2. Key Themes in Fiscal 2009*

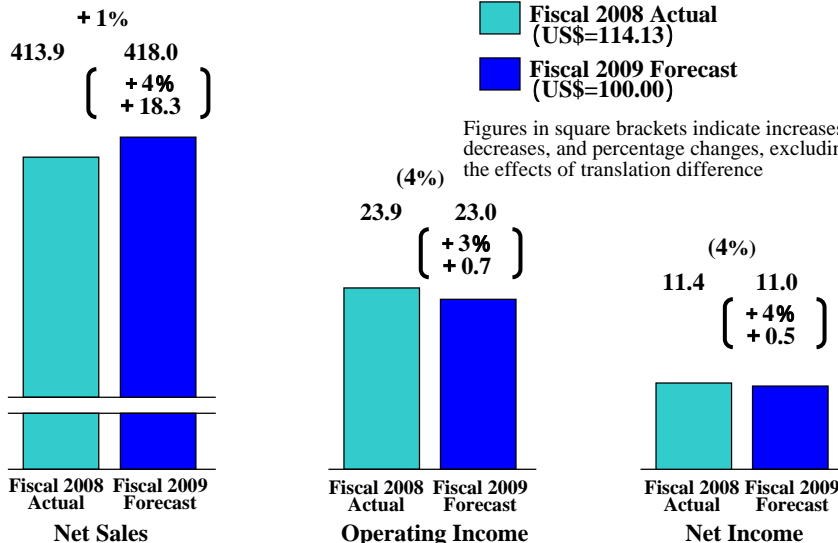
*3. Global Vision 2020 and New Corporate Brand*

# 1. Forecast for Fiscal 2009



## Consolidated Total

(unit: billions of yen)



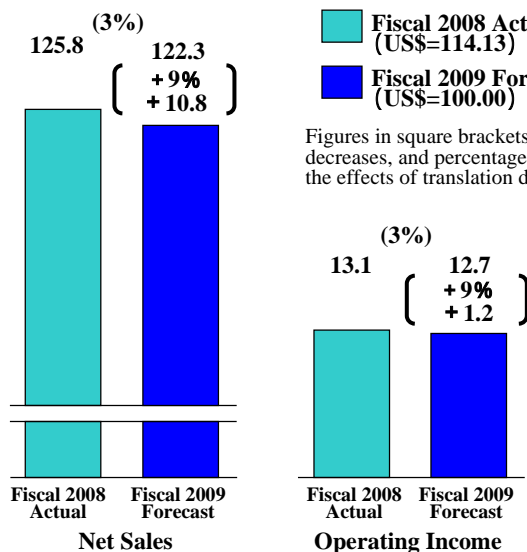
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# 1. Forecast for Fiscal 2009



## Overseas Total

(unit: billions of yen)

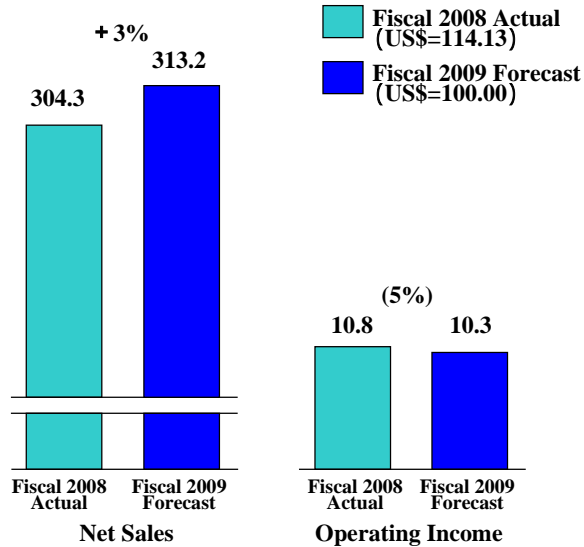


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# 1. Forecast for Fiscal 2009

## Japan Total

(unit: billions of yen)



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# 2. Key Themes in Fiscal 2009

## Key Themes of Kikkoman Group

- 1) *Cultivate Existing Markets and Develop New Markets Overseas*
- 2) *Increase Earnings in Domestic Businesses*
- 3) *Reform Business Structures*

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## 2-1) Cultivate Existing Markets and Develop New Markets overseas

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### (1) Expand Soy Sauce Business — North America

#### Continuing Stable Growth

##### **Home Use Market**

Expand sales of high value added soy sauce products,  
Takumi (premium types of teriyaki), etc.

##### **Food Service and Industrial Use Market**

Strengthen initiatives in high-growth sales channels



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## 2-1) Cultivate Existing Markets and Develop New Markets overseas

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### (1) Expand Soy Sauce Business — Europe

#### Continuing Double Digit Growth

##### **Existing Market (UK, Germany, Scandinavian Countries)**

###### **Home Use Market**

Cultivate soy sauce market and expand sales of high value added products

###### **Food Service Use Market**

Develop new markets by creating new recipes and menus

###### **Industrial Use Market**

Boost product development through effective use of European R&D base

##### **Growing Market (Central and Eastern Europe and Russia)**

###### **Home-Use Market**

Increase reach into home-use market with in-store food sample campaigns and recipe development



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## 2-1) Cultivate Existing Markets and Develop New Markets overseas

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### (1) Expand Soy Sauce Business — Asia & Oceania

#### Increase Reach and Promote Growth in ASEAN Market

##### Home-Use Market

Promote naturally brewed soy sauce in the ASEAN market

##### Food Service and Industrial-Use Market

Promote development of products matched to customer needs

#### Expand Into Key New Markets

**Penetrate Product Development Targeting Chinese and Indian Consumers**

**Continue to Expand Our Sales Channels in China**



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## 2-1) Cultivate Existing Markets and Develop New Markets overseas

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### (2) Expand Foods Wholesale Business

#### Expand Businesses on a Global Scale

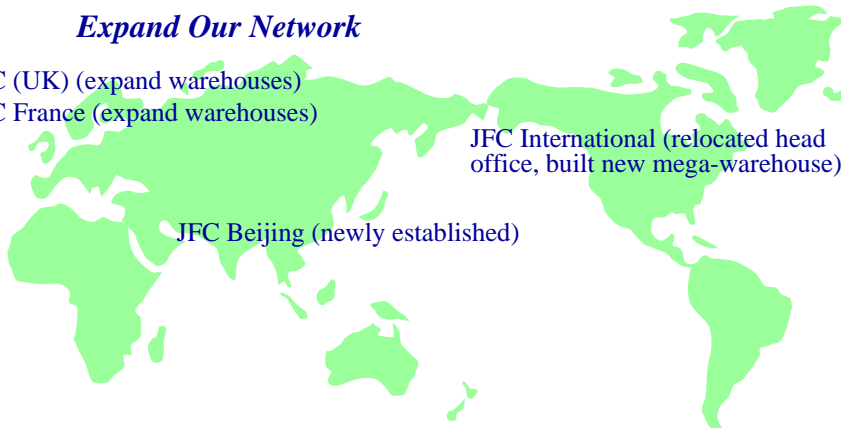
##### Expand Our Network

JFC (UK) (expand warehouses)

JFC France (expand warehouses)

JFC International (relocated head office, built new mega-warehouse)

JFC Beijing (newly established)



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## 2-2) Increase Earnings in Domestic Businesses

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### Strategy for Increasing Earnings

#### Change Focus From Quantity to Quality

*Soy Sauce:*

*Promote High Value Added Products*

*Soy Sauce Derivative Products:*

*Expand Sales of Tsuyu (Soy Sauce Soup Base),*

*Tare (Dipping and Marinade Sauces)*

*and Uchi-no-Gohan Series (Japanese-style Seasoning Mixes)*

*Del Monte:*

*Expand Sales of “Health-conscious Vegetable Drinks”*



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## 2-3) Reform Business Structures

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### (1) Plans for Kibun Food Chemifa Co., Ltd.

#### Kibun Food Chemifa to Become Wholly Owned Subsidiary This Coming August 2008

*Accelerate synergies with beverages and other areas*



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## 2-3) Reform Business Structures

### (2) Plans for the Coca-Cola Business



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## 3) Global Vision 2020 and New Corporate Brand

### (1) Global Vision 2020

#### **Defining a Vision for the Future of the Kikkoman Group**

- (i) *Make Kikkoman soy sauce a truly global seasonings*
- (ii) *Become a company that supports healthy lifestyle through food*
- (iii) *Become a company whose existence is meaningful to global society*

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### 3) Global Vision 2020 and New Corporate Brand

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#### (2) New Corporate Brand

Full-scale Introduction of New Brand Identity Starting June 2008

Japan

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おいしい記憶をつくりたい。

Overseas

kikkoman

seasoning your life

Brand Logos and Slogans

おいしいの、まんなか仁。



太陽を、おいしさに。



ひとつ上の、まごころ。



日本がおいしいくなるワイン。

