FY2026 Q1 FAQ

Oisix Inc.

August 13, 2026

Summary

OISIX

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Impact of Consumption Tax Reduction on Food Products (1/2)

OISIX

Q What is the impact on the Company accompanying a consumption tax reduction on food products?

A We recognize that a consumption tax reduction would serve as a significant tailwind for our B2C (food delivery) business.

Our services are positioned in a price range centered on high-value-added, safe, and reliable agricultural products and meal kits. Consequently, a lower tax rate would lead to a relatively large reduction in the total amount paid by customers, which we expect will lower their barrier to purchasing. Beyond improving marketing efficiency in acquiring new subscribers, this is also expected to boost ARPU among existing subscribers through additional orders and increased purchasing frequency.

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Impact of Consumption Tax Reduction on Food Products (2/2)

OISIX

Q

What is the impact on the Company accompanying a consumption tax reduction on food products?

A

Furthermore, we anticipate that this shift in consumer behavior will drive increased demand for "premium meal solutions for dining at home or eating prepared foods at home," as customers seek convenient ways to enjoy high-quality meals. We expect products such as "Kit Oisix" and "Deli Oisix" to serve as effective offerings to meet this demand.

In addition, easing the monthly household financial burden associated with subscription delivery services will serve as a strong incentive for continued usage. Coupled with maintaining service satisfaction, lower churn rates will enhance customer lifetime value (LTV), contributing significantly to the stability and growth of our business results. While one-time costs such as system modifications will be incurred, we aim to leverage this opportunity to expand business opportunities that far outweigh these costs.

Upward Revision of Parent Net Income and Dividend Increase（1/3）

OISIX

Q

What is the background behind the upward revision of parent net income and the dividend increase disclosed on August 3?

A

As announced in the "Notice Regarding Revisions to Financial Forecasts and Dividend Forecast (Dividend Increase)" dated August 3, 2026, we have decided on an upward revision to parent net income and an increase in dividends.

For the Group‘s performance in FY26, despite the negative impact on net sales and profits resulting from the divestiture of the Vehicle Operation and Other Businesses, operating profit is expected to increase by 18.5% YoY, driven by a substantial profit gain in the B2B business (food service business).

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Upward Revision of Parent Net Income and Dividend Increase（2/3）

OISIX

Q What is the background behind the upward revision of parent net income and the dividend increase disclosed on August 3?

A In the B2B business, following the complete acquisition of SHiDAX as a wholly owned subsidiary in September 2025, we have been sequentially implementing organizational restructuring. Consequently, the effective tax rate burden will be structurally optimized from Q2 onward, and is expected to stabilize at an appropriate level in the 30% range over the medium to long term.

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Upward Revision of Parent Net Income and Dividend Increase（3/3）

OISIX

Q

What is the background behind the upward revision of parent net income and the dividend increase disclosed on August 3?

A

In addition to fundamental improvements in earnings power within the B2B business, structural reforms achieved through organizational restructuring have led to a forecast where parent net income is also expected to increase by 15.1% YoY.

Going forward, we remain committed to pursuing both business growth and the maximization of shareholder value through sustainable EPS expansion—driven by business growth centered on the B2B segment as well as structural reforms—along with active shareholder returns.

EBITDA and Operating Profit

OISIX

Q What are the details regarding EBITDA and operating profit?

A In Q1 of FY26, as differences between EBITDA and operating profit (1,102 million yen), amortization of goodwill was recorded at 121 million yen, and depreciation and amortization was recorded at 981 million yen (of which 191 million yen was related to customer-related assets).

In Q1 of FY25, as differences between EBITDA and operating profit (1,521 million yen), amortization of goodwill was recorded at 347 million yen, and depreciation and amortization was recorded at 1,173 million yen (of which 313 million yen was related to customer-related assets).

Regarding the YoY trend from Q1 of FY25 to Q1 of FY26, amortization of goodwill and depreciation and amortization decreased slightly due to factors such as the divestiture of the Vehicle Operation and Other Businesses.

Operating Profit and Parent Net Income (1/2)

OISIX

Q What is the difference between operating profit and parent net income?

A The difference between these profit measures is comprised of four elements: non-operating income/expenses, extraordinary income/losses, income taxes, and profit attributable to non-controlling interests. For FY26, the impacts of extraordinary income/losses and profit attributable to non-controlling interests are expected to be limited.

As a main item within non-operating income/expenses, interest expenses of 131 million yen were recorded. Investment gain/loss on equity method fluctuates depending on quarterly performance progress. While base interest rates are rising due to changes in the macroeconomic environment, interest expenses for FY26 are expected to decrease compared with FY25, driven by a reduction in the outstanding balance of borrowings.

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Operating Profit and Parent Net Income (2/2)

OISIX

Q What is the difference between operating profit and parent net income?

A The effective tax rate after applying tax effect accounting, which takes into account the statutory effective tax rate (30.6%) as well as the impact of goodwill amortization and other factors, was 38.1% for FY25. For FY26, the effective tax rate is expected to be around 40%, reflecting the reduction in amortization of goodwill and the organizational restructuring of the B2B business.

PMI of SHiDAX (1/4)

OISIX

Q What is the progress phase of the PMI (post-merger integration) since making SHiDAX a subsidiary in January 2024?

A Since SHiDAX joined the Group in January 2024, the PMI has been progressing steadily, with its momentum accelerating particularly after making the B2B business a wholly owned subsidiary in September 2025. Overall, we have outlined a roadmap in which integration synergies will materialize in the sequence of corporate functions, systems, logistics, and manufacturing. Currently, our phase is steadily transitioning from "defensive PMI"—focusing primarily on cost reductions—to "offensive PMI," aiming for structural profitability improvements and top-line growth.

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PMI of SHiDAX (2/4)

OISIX

Q

What is the progress phase of the PMI (post-merger integration) since making SHiDAX a subsidiary in January 2024?

A

Following the complete acquisition in September 2025, we sequentially executed an organizational restructuring of the B2B business, including absorption-type mergers between subsidiaries, aimed at maximizing Group-wide synergies and operational efficiency.

In conjunction with this, we revamped the organizational structure and integrated offices, fostering a mindset shift toward prioritizing profitability across the entire company. As a result, in addition to faster and smoother decision-making, we established a solid management foundation through strengthened financial standing and tax optimization, which led to the upward revision of parent net income announced on August 3, 2026.

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PMI of SHiDAX (3/4)

OISIX

Q What is the progress phase of the PMI (post-merger integration) since making SHiDAX a subsidiary in January 2024?

A The ongoing integration of corporate and IT departments is advancing the consolidation of Group-wide shared functions, integration of core IT systems, and establishment of operational processes, with cost reductions amounting to hundreds of millions of yen expected to be completed during FY26. Furthermore, we have initiated efforts to boost productivity by driving digital transformation (DX) in analog management and to nurture next-generation leaders through active personnel exchange, thereby laying the foundation for sustainable business growth across the Group.

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PMI of SHiDAX (4/4)

OISIX

Q

What is the progress phase of the PMI (post-merger integration) since making SHiDAX a subsidiary in January 2024?

A

Going forward, we will pivot toward structural reforms in the logistics and manufacturing domains as our top priority, along with creating synergies associated with top-line growth. At present, we are already reviewing cost synergies such as sharing delivery routes, operating new depots, and reducing costs through the effective utilization of in-house manufacturing plants. Furthermore, by jointly advancing the development of key products driving top-line growth—such as "Deli Oisix" and "Genki Gohan"—we will achieve sustainable growth for the entire Group.

OISIX

Q What is an update on the companies that have joined our group so far?

A Since 2016, we have acquired about 20 companies. Beyond the four companies already disclosed in our earnings reports (Radish Boya, Daichi wo Mamoru Kai, Purple Carrot, and SHiDAX), four additional companies—Bondish, Agrigate, HiOLI, Toyosu Gyosho Sanchoku Ichiba—contribute over 1 billion yen each to our consolidated sales.

As for Purple Carrot (U.S.), we began rightsizing its business scale in FY25 to adapt to the current vegan meal kit market in light of the challenging environment surrounding the vegan meal kit delivery business. In FY26, we are continuing these efforts, focusing on reducing fixed costs to lower the break-even point. Furthermore, as announced in April 2026, we acquired the Washoku business (airline catering business) from BentOn in the U.S. Moving forward, we will enter the U.S. B2B Washoku market and aim to achieve profitability for the entire U.S. business.

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M&A (2/4)

OISIX

Q What is your M&A policy?

A Previously, we have proceeded with grouping companies in the B2C business that share similar corporate philosophies and business models. Going forward, we will consider companies that contribute to expanding our lineup of attractive products, such as "Toyosu Gyosho Sanchoku Ichiba“, while actively pursuing M&A opportunities centered on the B2B (food service business).

In the B2B business, the performance of food service providers has deteriorated, and some have gone bankrupt due to soaring food and labor costs and a shortage of human resources. This has accelerated industry consolidation, with the entry of companies from other industries.

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Q What is your M&A policy?

A Taking advantage of this market environment, we aim to establish a "time-efficient food service model" by leveraging our B2C expertise to solve long-standing market issues, and to pursue M&A to lead industry restructuring.

We utilize the EV/EBITDA multiple as our primary benchmark for investment appraisals. Our policy is to limit acquisition prices to levels comparable to our own valuation, including synergy effects. We do not inflate acquisition costs by overvaluing uncertain synergies. Rather, we remain committed to a disciplined investment approach, focusing exclusively on opportunities that generate returns above the cost of capital.

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M&A (4/4)

OISIX

Q What is your M&A policy?

A Furthermore, in addition to major financial risks like goodwill and financial leverage, we will establish appropriate management systems for operational risks—such as diversification of management resources, organizational bloat, and legal/compliance risks—and systematically execute PMI.

(Oisix) ARPU/LTV (1/2)

OISIX

Q What is your outlook for Oisix's ARPU and LTV?

A We position ARPU and LTV as key metrics for evaluating the healthy growth of our subscription model. We anticipate continuous improvement in these metrics by simultaneously expanding our high-value-added product lineup tailored to diversifying customer life stages and optimizing the customer experience (UX).

Regarding the improvement of ARPU, we will enhance our AI-driven recommendation engine to provide optimal suggestions based on individual customer's usage and the number of items purchased. We will strengthen initiatives that naturally encourage "add-on purchases," such as offering discounts based on the number of items per order, while maintaining profit margins. Additionally, we aim to increase the number of items per purchase by expanding the "Tasudake" (Just add) series, which meets the needs of families with growing children as well as larger-capacity formats for meat and deli dishes.
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(Oisix) ARPU/LTV (2/2)

OISIX

Q What is your outlook for Oisix's ARPU and LTV?

A To maximize LTV (Lifetime Value), we will focus on improving retention rates in addition to increasing ARPU. We will build a UI that allows each customer to intuitively select the most suitable products, providing a stress-free shopping experience. This will support customers in “onboarding“ (mastering) the service during their initial period of membership, preventing early churn and encouraging habituation.

Furthermore, we will expand our product range to address evolving needs across various life stages—from childbirth to the completion of child-rearing. This includes the "Cho-Raku (Super easy) Kit" and "Deli Oisix," which reduce the cooking burden during busy times, and the "Tasudake" series, which addresses the issue of insufficient meal volume for growing children. By continuously introducing limited-edition products, such as collaborations with popular brands, we will foster customer loyalty and enhance long-term intent to continue using our services.

(Oisix) Marketing Policy

OISIX

Q What is your marketing policy for Oisix?

A To ensure healthy business growth, we have set unit economics (LTV/CAC) and the investment payback period as key indicators. Specifically, we execute disciplined marketing investments benchmarked against the standards of a high-quality subscription model: "LTV of 3 times CAC" and "payback period within one year.“

In our future marketing, we will focus on maximizing LTV by encouraging customers to continue using our services longer, rather than simply expanding the number of subscribers. Specifically, we will strictly select channels with an emphasis on LTV, such as reducing our dependency on performance advertising and investing in channels where high retention rates are expected.

Furthermore, we will further enhance the accuracy of investment decisions to ensure alignment with company-wide profit targets, balancing flexible investment for future growth with disciplined management focused on capital efficiency.

(B2B) Competitive Advantages (1/4)

OISIX

Q What are your competitive advantages in food services for senior care facilities?

A In our B2B business for senior care facilities, we have achieved a balance between efficiency and labor savings through fully prepared meals and high added value—two factors traditionally considered a trade-off. Specifically, by combining Oisix's product development capabilities (the joy of eating and deliciousness, low-volume high-calorie options, and maintenance of bodily functions) with SHiDAX's expertise in facility operations, we help solve labor shortages and rising costs on the facility side while providing residents with the pleasure of eating.

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(B2B) Competitive Advantages (2/4)

OISIX

Q What are your competitive advantages in food services for senior care facilities?

A 1. Fully Prepared Meals That Never Compromise on Deliciousness and Added Value

While the market was divided between high-cost on-site cooking and efficient but lower-quality prepared meals, we differentiate ourselves by delivering high added value—such as deliciousness and functional maintenance—without sacrificing the convenience of fully prepared meals, avoiding simple price competition.

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(B2B) Competitive Advantages (3/4)

OISIX

Q What are your competitive advantages in food services for senior care facilities?

A 2. Product Development Capabilities Born from Oisix’s B2C Expertise
Leveraging the know-how cultivated through developing meal kits for Oisix subscription members, our technology enables anyone to consistently reproduce delicious flavors, eliminating taste inconsistencies caused by kitchen staff variations.

- Full-Plate Colorful Soft Meals & Smooth Colorful Pureed Food: Proprietary technology like plant enzymes enables swallowable, tongue-crushable soft textures while preserving original appearance and flavor to stimulate appetite.

- Low-Volume, High-Nutrition Food ("Sugo-Calo Series"): Product that provides 100% of required calories at 80% of standard portion size, helping seniors who struggle to finish full meals.

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(B2B) Competitive Advantages (4/4)

OISIX

Q What are your competitive advantages in food services for senior care facilities?

A 3. Simultaneous Realization of Time and Cost Efficiency
Leveraging SHiDAX's operational expertise, we assist facilities in resolving severe labor shortages and soaring costs.

- Time Efficiency (On-Site Labor Savings): Consolidating food textures into three categories (regular, soft, pureed) eliminates complex on-site prep, enabling operation with minimum part-time staff without relying on hard-to-recruit dietitians or chefs.
- Cost Efficiency (Sustainable Pricing): Our data-driven 45-day menu cycle minimizes food loss, delivering predictable, sustainable pricing starting from 1,550 yen per person for three daily meals.

Synergies between B2C and B2B (Logistics)

OISIX

Q How are the logistics frameworks for B2C and B2B businesses performing?

A In our B2C business, we are working to minimize costs by maximizing logistics efficiency. This is achieved by consolidating our primary domestic logistics hubs into two of the largest facilities in Japan—Ebina (refrigerated) and Atsugi (frozen)—and driving improvements in packing efficiency through advanced automation and DX (Digital Transformation). In our B2B segment, our subsidiary, SLOGIX, manages centralized logistics for contracted facilities nationwide.

Looking ahead, we intend to expand our proprietary delivery network beyond the Group to establish it as a "common industry delivery infrastructure." Specifically, we will adapt to the evolving last-mile landscape by promoting collaborative delivery with other companies. Furthermore, by building a delivery monitoring system utilizing dynamic management and cargo visualization, we aim to improve loading efficiency and delivery density. Through these initiatives, we will reduce our logistics cost ratio and establish an even more robust management foundation.

Synergies between B2C and B2B (Manufacturing)

OISIX

Q How are the manufacturing frameworks for B2C and B2B businesses performing?

A In our B2C business, our Ebina facility serves as the primary production hub, specializing in our flagship "Kit Oisix." We are driving down costs by designing proprietary automated lines tailored for Kit production and by expanding the scope of in-house raw material processing. Meanwhile, our B2B business operates a production base in Kyoto, equipped with advanced freezing technology and versatile cooking capabilities. Recently, the facility in Kyoto has also begun producing pre-cut ingredients for our B2C business.

Looking ahead, we aim to increase the in-house production ratio for products such as B2C's "Deli Oisix" and B2B's "Genki Gohan." By thoroughly promoting the mutual utilization of ingredients and integrating production bases and operations, we enhance customer satisfaction while optimizing Group-wide FL costs (food and labor). These initiatives will be central to our ongoing efforts to improve cost efficiency.

Synergies between B2C and B2B (Procurement)

OISIX

Q How are the procurement frameworks for B2C and B2B businesses performing?

A Our B2C business is built upon a direct network of approximately 4,000 producers nationwide. By leveraging high-precision demand forecasting inherent to the subscription model, we provide flexible menu suggestions to balance supply and demand. This allows us to maintain an exceptionally low food loss rate while establishing a procurement system based on stable pricing. In our B2B business, our subsidiary SLOGIX leads the integration of procurement functions, striving to reduce costs by maximizing economies of scale through bulk purchasing.

Moving forward, we will fully promote joint procurement utilizing the assets of both businesses to further strengthen our cost competitiveness. Specifically, in addition to strengthening purchasing power through joint procurement of raw materials and product integration, we will establish a scheme to utilize high-quality but non-standard ingredients that do not meet B2C standards at B2B cooking sites (such as for pre-cut vegetables and processed items), thereby balancing food waste reduction with cost improvement.

B2C (Food Delivery Market) (1/2)

OISIX

Q

What is your outlook on the food delivery market, and what is your strategy to differentiate your services from those of other companies?

A

The domestic food delivery market is worth approximately 3 trillion yen and is expected to continue growing at an annual rate of approximately 3%, indicating steady expansion. While our market share remains in the low single digits, we believe we can continue to grow in the domestic market, based on the experience of other global companies.

In addition, the ratio of e-commerce in the overall food market is only about 4%, which means it is still a niche market. The market, including other companies' services, is expected to become more active.

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B2C (Food Delivery Market) (2/2)

OISIX

Q

What is your outlook on the food delivery market, and what is your strategy to differentiate your services from those of other companies?

A

We provide specialized subscription services. We have established high barriers to entry in this field through our direct network of contract producers who produce high-value-added products and our service development skills based on customer insights. As a result, we have established ourselves as the No. 1 company in this field based on total sales.

Currently, approximately 40% of Oisix customers are concentrated in the Greater Tokyo Area (Tokyo and three neighboring prefectures). Going forward, we aim to expand our service user base and improve profitability beyond the Greater Tokyo Area.

B2B (Food Service Market) (1/2)

OISIX

Q

What is your outlook on the food service market, and what is your strategy to differentiate your services from those of other companies?

A

The domestic food service market is extremely large, worth approximately 5 trillion yen, with elderly care facilities accounting for roughly 1 trillion yen of that total, and is stable. Food service providers are experiencing deteriorating performance and even bankruptcy due to concerns about declining meal quality from recent labor shortages and pressure on profits from increased ingredient and labor costs.

By applying the know-how we have cultivated in B2C business to our food service business, we aim to establish and introduce a "time-efficient food service model" that achieves both labor savings and high added value.

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B2B (Food Service Market) (2/2)

OISIX

Q What is your outlook on the food service market, and what is your strategy to differentiate your services from those of other companies?

A We will also actively pursue M&A opportunities with the aim of becoming a top player in the food service industry.

Currently, approximately 40% of our contracted facilities are concentrated in the Greater Tokyo Area. Going forward, we aim to expand the number of facilities nationwide and improve profitability, not just in the Greater Tokyo Area.

Macro Environment (Food Costs) (1/2)

Oisix

Q What is your view on the soaring prices of ingredients such as vegetables and rice?

A We leverage our ability to procure products through a direct network of contract producers, enabling us to enter into contracts in advance and purchase directly.

Therefore, our B2C business like Oisix is able to mitigate the impact of rising raw material prices compared to traditional distribution channels that rely on wholesalers. Additionally, we offer organic and low-pesticide vegetables and additive-free processed foods, which are generally higher-priced than standard products. As a result, the price gap with general retailers is expected to narrow in relative terms in an inflationary environment.

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Macro Environment (Food Costs) (2/2)

OISIX

Q What is your view on the soaring prices of ingredients such as vegetables and rice?

A Additionally, we purchase non-standard and unused fresh produce and use it as raw ingredients for processed products, primarily meal kits. Going forward, we plan to implement measures to achieve both price normalization and reduced product costs. The B2B business involves many traditional distribution channels through wholesalers and is a business model easily affected by market prices. In FY26, we have responded to soaring market prices by optimizing our prices. However, in the future, our profit margins may be affected by a time lag between food price increases and price optimization.

Recently, disruptions in logistics networks against the backdrop of the Strait of Hormuz issue and associated procurement risks have materialized. There is a possibility that procurement costs may soar, reflecting rising fuel prices in Southeast Asia, which is one of our procurement regions. We will focus on building a resilient profit base that can withstand changes in the external environment by diversifying procurement routes and flexibly adjusting menu compositions.

Macro Environment (Labor Costs) (1/2)

OISIX

Q What is your view on the soaring labor costs caused by the tight labor market?

A In recent years, with a tight labor market and increases in the minimum wage as a backdrop, labor costs have steadily risen across the industry, including ours. We expect labor shortages to continue to worsen and upward pressure on wages due to legal regulations to persist in the future.

Particularly in our B2B business, where we are accelerating business expansion, the demand for human resources is rising while securing personnel across the industry has entered a more difficult phase. Most recently, the hurdles to securing a stable workforce have risen further due to intensifying competition for talent with other industries, including revisions to the operation of the Specified Skilled Worker system that supports the utilization of foreign personnel.

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Macro Environment (Labor Costs) (2/2)

OISIX

Q What is your view on the soaring labor costs caused by the tight labor market?

A Given these circumstances, we believe the labor shortage that has long plagued the food service market will worsen in the future. We see this situation as an opportunity to provide high value while reducing labor costs, and we plan to develop and introduce a "time-efficient food service model."

Through this model, we aim to help solve the labor shortage and improve operational efficiency across the food service industry.

Macro Environment (Shipping Costs)

OISIX

Q What is your view on the soaring delivery costs caused by rising fuel costs and labor shortages?

A B2C logistics can be broadly divided into delivery from producers to our logistics center and last-mile delivery from our logistics center to customers.

Of these, last-mile delivery from our distribution centers to customers, which has a significant impact, is primarily outsourced to YAMATO TRANSPORT. Therefore, given the current situation in the logistics industry—including legal revisions and soaring crude oil prices—requests for delivery fee increases could negatively impact our business performance.

On the other hand, we have continued to build a good business relationship with YAMATO TRANSPORT through initiatives such as optimizing cargo sorting and delivery operations at our distribution centers. At present, we expect that the impact on our business results will be minimal.

Macro Environment (Monetary Policy)

OISIX

Q What is your view on the macroeconomic financial situation, including the Strait of Hormuz issue?

A In addition to recent international instability, the outlook for interest rates and foreign exchange rates remains uncertain due to factors such as fluctuations in monetary policies and economic indicators of major countries, as well as concerns over rising energy prices resulting from heightened tensions in the Strait of Hormuz.

Even in this environment, considering our current balance of borrowings (approximately 20 billion yen) and interest rate levels (1% to 2%), we anticipate that the direct impact of the macroeconomic environment on our interest burden will be limited. Regarding the impact of exchange rate fluctuations and tariffs, while some impact on certain US dollar-denominated system-related expenses is recognized, we consider it to be minimal at this time.

We will continue to monitor the impact of the financial environment on our business and take appropriate measures as necessary.

New Lease Accounting Standard

OISIX

Q What is the impact of the application of the new lease accounting standard from FY27?

A We anticipate that the impact of the new lease accounting standard, scheduled for adoption from FY27, on our financial statements will be limited.

On the balance sheet, we expect total assets to increase slightly due to the recognition of right-of-use assets and lease liabilities. On the income statement, although depreciation and interest expenses will increase, rent expenses will decrease. Therefore, we believe the impact on net income will be minimal.

We will continue to monitor the impact of changes in accounting standards on our business and take appropriate measures as necessary.

Reference: Oisix Subscription Course

Kit Oisix Course

Meal kit with a cooking time starting from 10 minutes

Seasonal Fresh Produce Course

Selected seasonal ingredients from across Japan

Cook Box

3 or 5 days of meal kit with recipes

Deli Oisix Course

Ready-to-heat deli dishes

Health Care Course

Calorie- and sodium-conscious meal kits and products

Baby&Kids Course

Seasonal produce ideal for babies and children under 3

Disclaimers

OISIX

This document contains forward-looking statements about the Company such as forecasts, outlooks, targets, and plans. These statements are based on forecasts made at the time of the preparation of this document using information currently available to the Company. In addition, certain assumptions are used for such statements. These statements or assumptions are subjective and may prove inaccurate in the future or may not be realized, due to a variety of inherent risks and uncertainties. The forward-looking information contained in this document is current as of the date of this document, and the Company is under no obligation and has no policy of regularly updating this information.

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