AROMAZZA'S

Increasing the Size of the Pie

Earnest and Young-ish

EY

Meet The Team

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ExtravaganZZa

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Pacific Veggie

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Buffalo Chicken

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Memphis BBQ

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Ultimate Pepperoni

Executive Summary

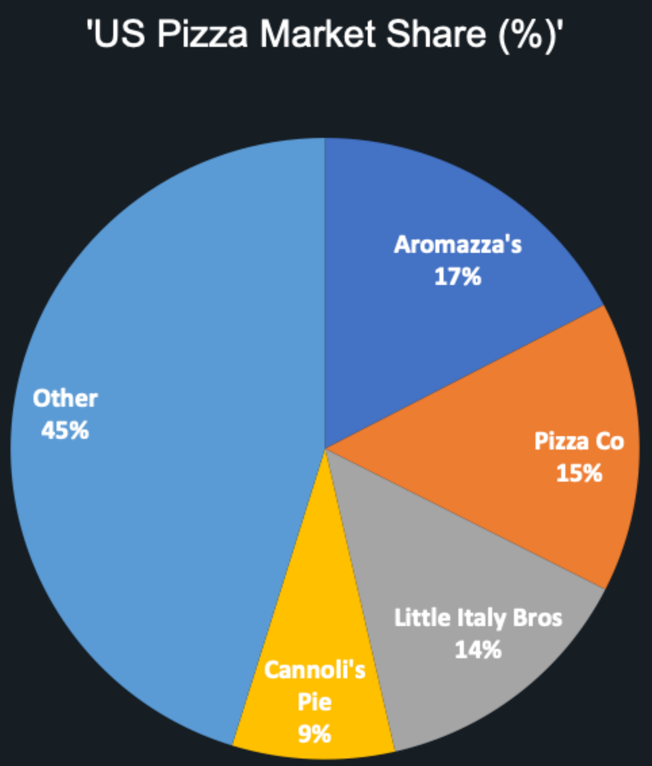
Helping you keep your eye on the pie

Increase revenue by leveraging 3rd-party delivery partners to keep up with changing customer presence

Mitigate labor issues related to delivery drivers by utilizing hybrid model for small percentage of deliveries when drivers unavailable

Improve customer satisfaction by renegotiating contracts with suppliers for major recipe ingredients

Industry Overview



US Pizza Market Size – 22.7 Bn USD

Avg. Profit Margin – 14%

Mature Industry

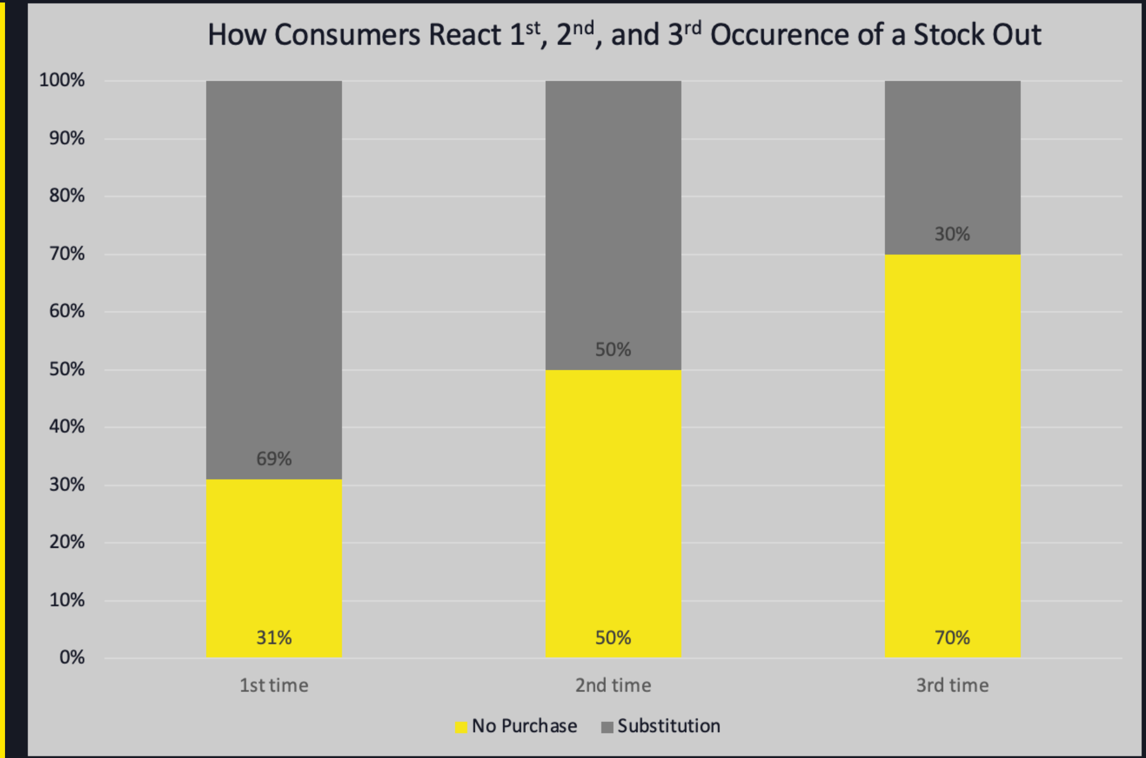
Identifying Supply Chain Bottlenecks

Supplier Side Dependencies

Concentrated Suppliers

1. Single supplier for cheese
2. Concern for quality control
3. Single meat supplier and no meatless options

- Costs
- Availability
- Decreased options



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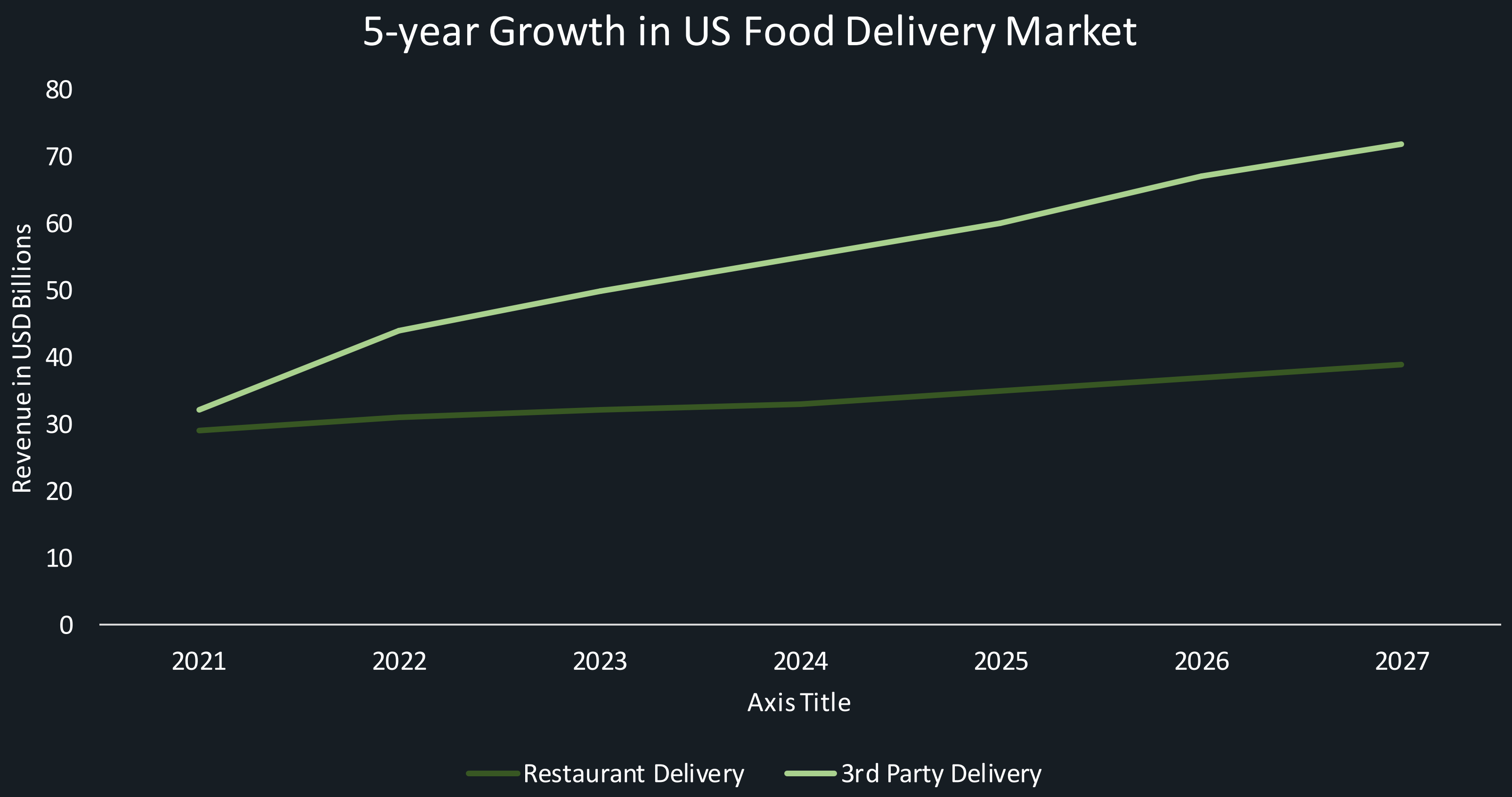
Tapping Unmet Potential

Leveraging 3rd-party delivery apps



- **100% increase in 3rd party delivery**
- **30% increase in restaurant delivery**

Recommendations

Creative, but not pie in the sky

Third Party Partnership Model – Two Tiers

	Store-front Partner	**Service Partner**
Platform partner value-add	Listing	Hybrid
Delivery fulfilled by		
Commission to platform partner	5%	8.5%

Customer Conversion Strategy

Price incentives

Flat 10% off on all orders in Aromazza's App + Free Pizza for sign-up

Tracking conversion

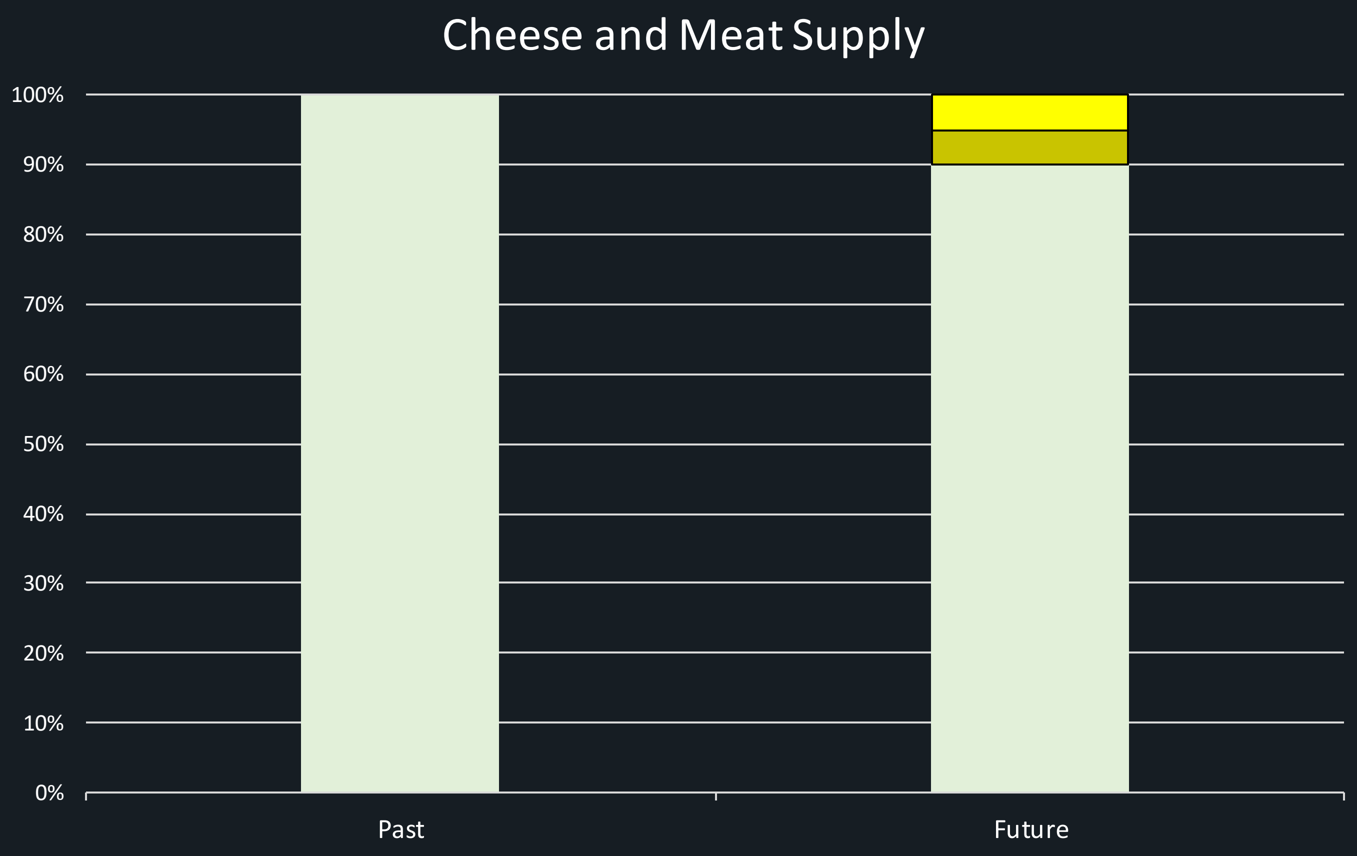
Unique sign-up QR code on each box + testing through owned stores

Loyalty Program

Pilot free product based on in-app order frequency

Building Resilient Supply Chain

- Diversify suppliers
- Maintain relationship with WisconQueso and Osconi at *same* volume.
- Hedge against WisconQueso and Osconi's shortage possibility by asking them to cover the spread



Implementation

1

1. Negotiate contracts with Door Dash to utilize service in a hybrid model
2. Research due diligence, supplier capabilities, and potential supplier contracts to evaluate diversification
3. Sign a new contracts with Wiscon Queso, Osconi, and other suppliers

2

1. Build out and analyze a database from door dash orders
2. Analyze quality control quantitatively and qualitatively
3. Implement targeted marketing campaigns to convert customers to our platform

3

1. Re-evaluate need for contracts with 3rd party
2. Evaluate financials and capabilities for backward vertical integration of food supplies
3. Evaluate expanding market segment into food trucks and grocers

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Risks

Platform Partnership	Customer data being collected by platform that can be used against us	Partial loss of control over delivery could risk customer satisfaction	Customers looking for Aromazza on platform might purchase form competitor
Supply Chain	Diversifying suppliers can lead to difference in tastes	Can lead to conflict with current suppliers	Diversified model still has systemic reliance risks

Mitigation

Supply chain:

- Modify inventory and management strategy real-time to assess problems before they become issues
- Do periodic taste tastings for products to ensure consistent quality

Delivery quality control:

- Maintain control over the delivery experience
- With the hybrid model during delivery constraints we could use specialized packaging to help retain heat and separate hot from cold items
- Include survey for diners with a negative experience and provide remediation

QUESTIONS?

$ in 000's

Projected Statement of Income- Before third party recommendation

Horizontal Analysis

Particulars	2021	2022	2023	2024	YOY%-2021-22	YOY%-2022-23	YOY%-2023-24
Net sales	$ **3,941,244**	$ **4,098,894**	$ **4,221,861**	$ **4,348,516**	4.00%	3.00%	3.00%
Cost of goods sold	**2,414,229**	2,522,220	2,597,887	2,675,824	4.47%	3.00%	3.00%
Gross profit	1,527,015	1,576,673	1,623,973	1,672,693	**3.25%**	**3.00%**	**3.00%**
Operating expense	**821,136**	867,941	893,979	920,798	5.70%	3.00%	3.00%
Operating profit	**705,879**	**708,732**	729,994	751,894	**0.40%**	**3.00%**	**3.00%**
Finance Costs	**173,177**	171,926	177,084	182,396	-0.72%	3.00%	3.00%
Other income	**33,247**						
Income before income taxes	**565,949**	**536,806**	**552,911**	**569,498**	**-5.15%**	**3.00%**	**3.00%**
Tax	**104,233**	86,198	88,784	91,447	-17.30%	3.00%	3.00%
Net income including noncontrolling interests	**461,716**	**450,608**	**464,127**	**478,050**	**-2.41%**	**3.00%**	**3.00%**
Less: Net income attributable to noncontrolling interests	**0**	0	0	0			
Net income attributable to common stakeholders	**461,716**	**450,608**	**464,127**	**478,050**	**-2.41%**	**3.00%**	**3.00%**

$ in 000's

Projected Statement of Income- After third party recommendation

Horizontal Analysis

Particulars	2021	2022	2023	2024	YOY%-2021-22	YOY%-2022-23	YOY%-2023-24
Net sales	$ **3,941,244**	$ **4,098,894**	$ **4,590,761**	$ **5,279,375**	4.00%	12.00%	15.00%
Cost of goods sold	**2,414,229**	2,522,220	2,824,887	3,248,620	4.47%	12.00%	15.00%
Gross profit	1,527,015	1,576,673	1,765,874	2,030,755	**3.25%**	**12.00%**	**15.00%**
Operating expense	**821,136**	867,941	972,094	1,117,908	5.70%	12.00%	15.00%
Operating profit	**705,879**	**708,732**	793,780	912,847	**0.40%**	**12.00%**	**15.00%**
Finance Costs	**173,177**	171,926	192,557	221,441	-0.72%	12.00%	15.00%
Other income	**33,247**						
Income before income taxes	**565,949**	**536,806**	**601,223**	**691,407**	**-5.15%**	**12.00%**	**15.00%**
Tax	**104,233**	86,198	96,542	111,023	-17.30%	12.00%	15.00%
Net income including noncontrolling interests	**461,716**	**450,608**	**504,681**	**580,384**	**-2.41%**	**12.00%**	**15.00%**
Less: Net income attributable to noncontrolling interests	**0**	0	0	0			
Net income attributable to common stakeholders	**461,716**	**450,608**	**504,681**	**580,384**	**-2.41%**	**12.00%**	**15.00%**

(A) The case facts indicated that the growth rate for 2022 was expected to be 4%. Additionally, they state they expect a 25% drop in revenue growth for the next fiscal year, or 3%. We assume the rate remains flat if we follow the same business model. Therefore, considered the 4% & 3% rates for projecting revenue before recommendations.

(B) However, we assume that if we utilize the third-party model we are actually able to increase our exposure to users outside of our traditional markets and increase sales incrementally via the third-party delivery app. In addition, we assume we are able to convert some users over to our website via consumer conversion plan and thus are able to increase our annual year over year sales by 12% begining in 2023 and 15% in 2024.

(C) The total revenue generated from third-party vendors was calculated based on estimates obtained from industry data based on Pizza Hut which is assumed to be a comparable entity.

(D) Average %'s of 2021, 2020, 2019 & 2018 are considered as the basis for

$ in 000's

Statement of position

HORIZONTAL ANALYSIS

ASSETS	2021	2020	2019	2018
TOTAL ASSETS	1,512,157	1,339,928	1,243,883	820,730

LIABILITIES AND SHAREHOLDER'S EQUITY	2019	2018	2017	2016
TOTAL LIABILITIES	5,319,683	4,161,775	4,318,066	3,570,338
TOTAL EQUITY	(3,807,525)	(2,821,847)	(3,074,183)	(2,749,609)
TOTAL LIABILITIES AND EQUITY	$ 1,512,158	$ 1,339,928	$ 1,243,883	$ 820,729

ASSETS	YOY%-2020-21	YOY%-2019-20	YOY%-2018-19
TOTAL ASSETS	12.85%	7.72%	51.56%

LIABILITIES AND SHAREHOLDER'S EQUITY	YOY%-2018-19	YOY%-2017-18	YOY%-2016-17
TOTAL LIABILITIES	27.82%	-3.62%	20.94%
TOTAL EQUITY	34.93%	-8.21%	11.80%
TOTAL LIABILITIES AND EQUITY	12.85%	7.72%	51.56%

VERTICAL ANALYSIS

ASSETS	2021	2020	2019	2018
TOTAL ASSETS	100.00%	100.00%	100.00%	100.00%

TOTAL LIABILITIES	351.79%	310.60%	347.14%	435.02%
TOTAL EQUITY	-251.79%	-210.60%	-247.14%	-335.02%
TOTAL LIABILITIES AND EQUITY	100.0%	100.0%	100.0%	100.0%

$ in 000's

Consolidated Statement of Income

Horizontal Analysis

Particulars	2021	2020	2019	2018	YOY%-2020-21	YOY%-2019-20	YOY%-2018-19
Net sales	**$ 3,941,244**	**$ 3,520,387**	**$ 3,256,897**	**$ 3,089,580**	11.95%	8.09%	5.42%
Cost of goods sold	**2,414,229**	2,157,095	1,994,648	1,926,755	11.92%	8.14%	3.52%
Gross profit	1,527,015	1,363,292	1,262,249	1,162,825	**12.01%**	**8.00%**	**8.55%**
Operating expense	**821,136**	742,868	695,783	661,180	10.54%	6.77%	5.23%
Operating profit	**705,879**	**620,424**	566,466	501,645	**13.77%**	**9.53%**	**12.92%**
Finance Costs	**173,177**	145,788	132,093	129,354	18.79%	10.37%	2.12%
Other income	**33,247**						
Income before income taxes	**565,949**	**474,636**	**434,373**	**372,291**	**19.24%**	**9.27%**	**16.68%**
Tax	**104,233**	54,578	73,735	60,335	90.98%	-25.98%	22.21%
Net income including noncontrolling interests	**461,716**	**420,058**	**360,638**	**311,956**	**9.92%**	**16.48%**	**15.61%**
Less: Net income attributable to noncontrolling interests	**0**	0	0	0	0.00%	0.00%	0.00%
Net income attributable to common stakeholders	**461,716**	**420,058**	**360,638**	**311,956**	**9.92%**	**16.48%**	**15.61%**

VERTICAL ANALYSIS

Particulars	2021	2020	2019	2018
Net sales	100.00%	100.00%	100.00%	100.00%
Cost of goods sold	61.26%	61.27%	61.24%	62.36%
Gross profit	**38.74%**	**38.73%**	**38.76%**	**37.64%**
Operating expense	20.83%	21.10%	21.36%	21.40%
Operating profit	**17.91%**	**17.62%**	**17.39%**	**16.24%**
Finance Costs	4.39%	4.14%	4.06%	4.19%
Other income	0.84%	0.00%	0.00%	0.00%
Income before income taxes	**14.36%**	**13.48%**	**13.34%**	**12.05%**
Tax	2.64%	1.55%	2.26%	1.95%
Net income including noncontrolling interests	**11.71%**	**11.93%**	**11.07%**	**10.10%**
Less: Net income attributable to noncontrolling interests	0.00%	0.00%	0.00%	0.00%
Net income attributable to common stakeholders	**11.71%**	**11.93%**	**11.07%**	**10.10%**

Financial Ratio Analysis

Ratios	Formulas
Liquidity Ratios	
1. Asset Turnover Ratio =	Net Sales / Average Total Assets
Profitability & Growth Ratios	
1. Revenue Growth	Revenue(Net sales) of Current Year / Revenue(Net Sales) of Previous Year - 1
2. Gross Profit (GP) / Margin	Gross Profit / Revenue
3. Operating Profit Margin (EBIT) =	EBIT / Revenue
4. Net Profit Margin (Net Income) =	Net Income / Revenue
5. Return on Assets (ROA) =	Net Income / Average Total Assets
6. Return on Equity (ROE) =	Net Income /Average shreholder's Equity (Or [ROA * (Total Assets / Equity) * (Net Income / EBIT)])
7. Profit Before Tax (PBT) =	Profit Before Tax/Revenue
Leverage/Solvency Ratios	
1. Debt Ratio =	Total Liabilities / Total Assets
2. Debt to Equity Ratio =	Total Liabilities / Equity
5. Interest Coverage Ratio (ICR) =	EBIT/Interest Expense

Ratios	FY21	FY20	FY19
Liquidity Ratios			
Asset Turnover Ratio	2.61x	2.63x	2.62x
Profitability & Growth Ratios	**FY21**	**FY20**	**FY19**
Growth %	11.95%	8.09%	5.42%
Overall GP%	38.74%	38.73%	38.76%
Operating Profit (Loss) Margin	18.75%	17.62%	17.39%
Net Profit (Loss) Margin	11.71%	11.93%	11.07%
ROA	30.53%	31.35%	28.99%
ROE	-12.13%	-14.89%	-11.73%
PBT (Loss) Margin	14.36%	13.48%	13.34%
Leverage/Solvency Ratios			
Debt Ratio	3.52	3.11	3.47
Debt to Equity Ratio	-1.40	-1.47	-1.40
Interest Coverage Ratio (ICR)	4.27	4.26	4.29

Summary of Cashflows

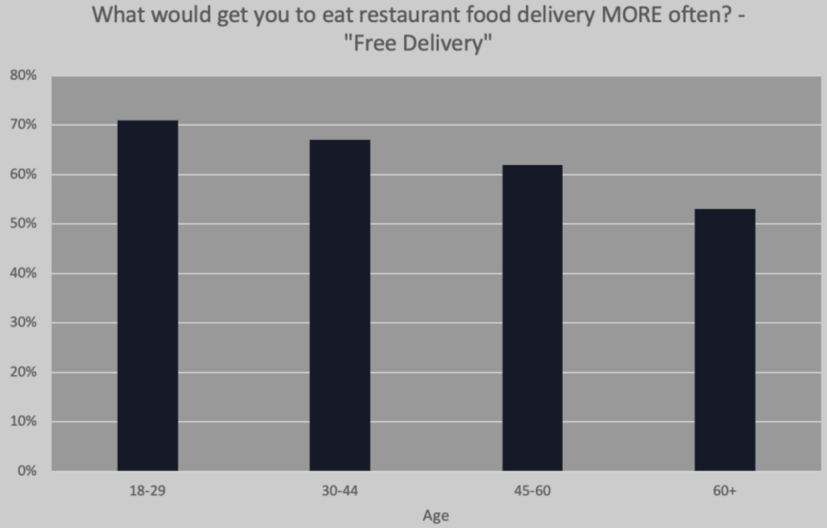
Particulars (Numbers in '000's)	12/31/2021	12/31/2020	12/31/2019	12/31/2018
Cash Flow from Operating Activities	597,661	457,422	447,255	360,102
Cash Flow from Investing Activities	(130,387)	(99,485)	(25,069)	(80,628)
Cash Flow from Financing Activities	(477,644)	(344,463)	(200,513)	(294,903)
Beginning Cash Position	154,230	147,086	213,677	232,819
Other cash adjustment outside change in cash	(8,218)	(30,877)		
Effect of exchange rate changes	(288)	587	181	(491)
End Cash Position	135,354	130,270	435,531	216,899

Supplemental Questions:

How can Aromazza's address softening demand when food delivery apps increase competition for delivered meals?

Delivery Fees:

- Free delivery is the #1 way to increase delivery orders across every age and delivery frequency level [1]
- Reducing delivery costs, special discounts and loyalty points/rewards as top factors that would get them to order delivery more (65% free delivery, 40% special discounts, 38% loyalty points/rewards)[1]



Third-Party Partnership Risks:

What are risks of partnering with third-party platforms?

- Third-party platforms own the customer data through their platforms – NOT the restaurants, underscoring the importance for restaurants to integrate delivery through their own branded websites/apps
- Data is arguably the most important element of increased digital utilization (including delivery) to better forecast demand, personalize offers, segment customers and influence behavior
- Most significant risk: third-party platforms use the rich customer data to launch their own food offerings based on demand & trends
    - Increasing availability of turnkey solutions (virtual & ghost kitchens), reducing capital requirements and barriers to entry

As restaurants partner with third-party providers and encourage customers to order through the platforms, they are also shifting their own customers

– Introduces customers to competitors on the platform

– Lose access to valuable customer data

– Platforms don’t necessarily have restaurants’ best interest in mind

– Delivery provider is last customer touchpoint, and could have implications for quality of food delivered and overall experience

Third-Party Partnership Risks (2):

Quality Control in Delivery

- Certain cuisines may not travel well, which could impact the experience for the customer
- Transport of food by third party could have food safety implications

Third-Party Partnership Risks (3):

Delivery Channel Increases Operational Complexity

- Addition of new ordering channels increases restaurant complexity
  - Lack of POS integration creates inefficiencies
    - Many restaurants require multiple tablets to key in orders if lacking POS integration
  - Could result in slower service times for in-store customers
- Requires changes in both back & front of house layouts to address potentially increased congestion and capacity requirements
- Restaurants adding designated pickup areas for digital/delivery orders, modifying back of house and front of house layouts and considering digital/delivery channels in future prototypes

Third party market share

3rd party download trends to inform market share trending

- Although app download trends understandably do not necessarily inform us on overall market share, they do point to where market share trends may be changing

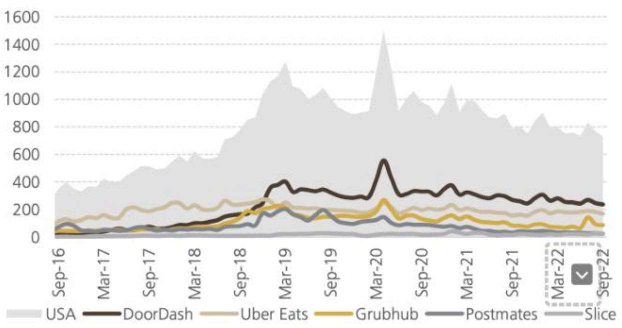
Share of app download (% of downloaded apps)

DATES	GRUBHUB	UBEREATS	DOORDASH
	14%	21%	28%
JAN 21	14%	21%	7%
FEB 21	15%	21%	-21%
MAR 21	13%	20%	-44%
APR 21	12%	20%	-32%
MAY 21	12%	21%	-9%
JUN 21	12%	20% 19%	-3%
JUL 21 AUG'21	12%	21%	-12%
SEP 21	11%	21%	-19%
OCT 21	10%	21%	-21%
NOV 21	9%	22%	-19%
DEC 21	11%	22%	-19%
JAN 22	10%	22%	-18%
FEB 22	10%	23%	-14%
MAR 22	9%	24%	-14%
APR 22	9%	23%	-17%
MAY 22	10%	25%	-13%
JUN-22	9%	23%	-14%
JUL-22	17%	24%	-11%
AUG-22	12%	23%	-17%
SEP-22	12%		-12%

Third party market share

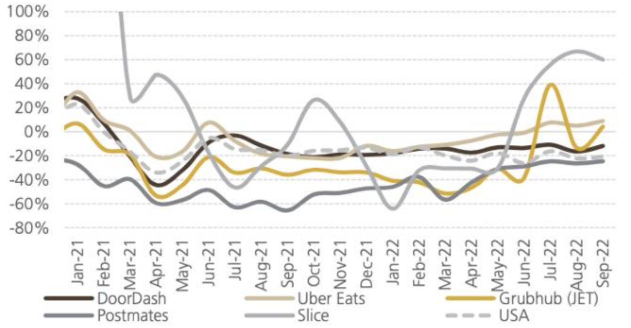
US

Figure 26: # Food Delivery App downloads index



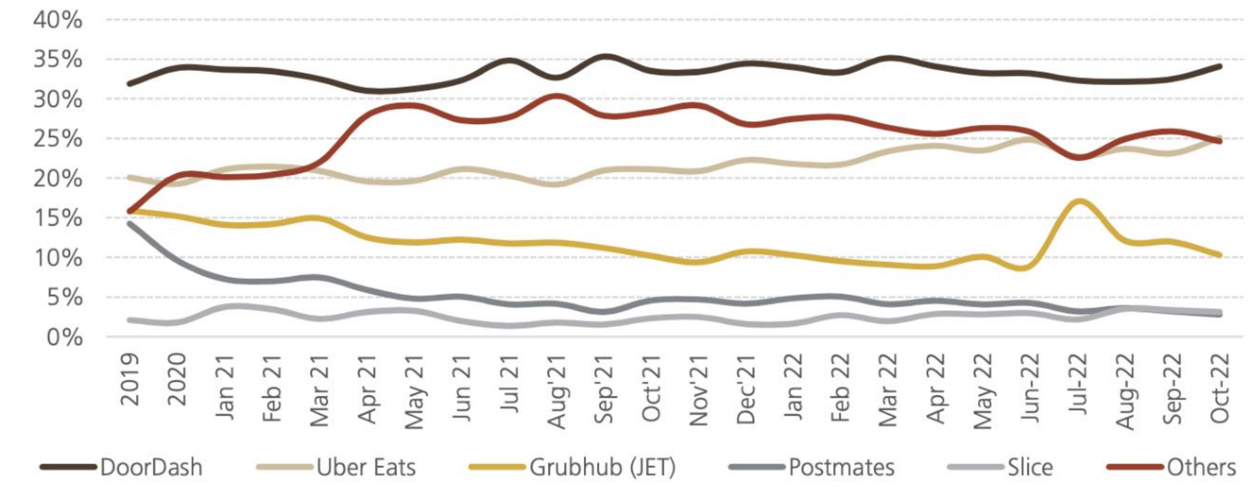
Source: UBS Evidence Lab (>Access Dataset)

Figure 27: % Growth of app download - US



Source: UBS Evidence Lab (>Access Dataset)

Figure 28: Share of app download - US (% of downloaded apps)

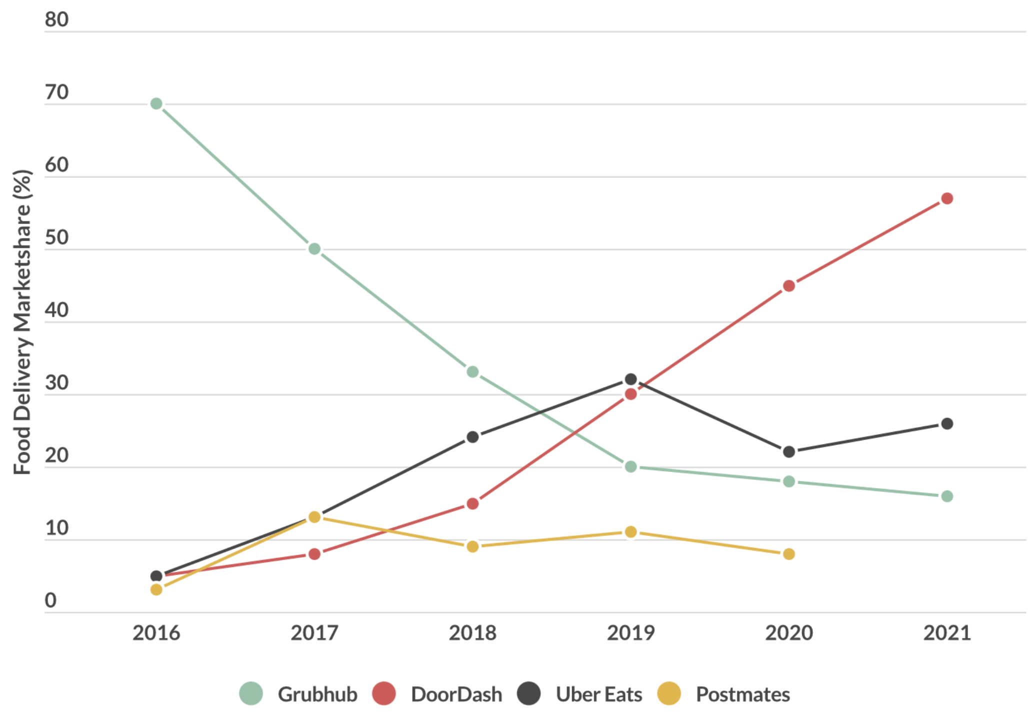


Source: UBS Evidence Lab (>Access Dataset) Note: Latest data as of 09 Oct 2022

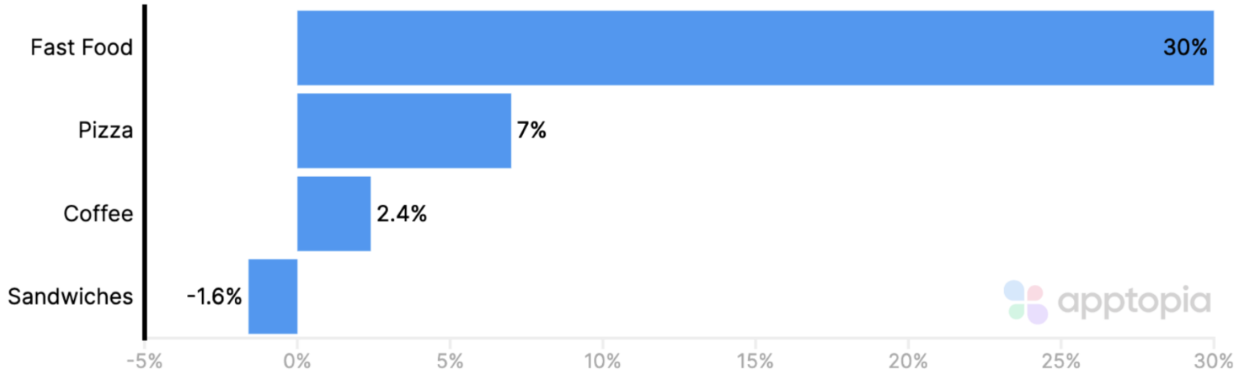
Third party market share

Sources: [CNBC](), Company data

DoorDash US market share vs competitors



Growth of QSR submarkets by MAU YTD (Jan - Sep), YOY



We broke quick service down into some of its segments and determined fast-food apps are growing the fastest and by a substantial margin. This is likely through a combination of running more "food for download" promotions than industry peers and the current economic conditions, where consumers expect lower prices with fast food providers compared with other meal options

***Adam Blacker** is the VP of Insights at Apptopia, the leader in real-time competitive intelligence. Brands use the platform to generate insights across mobile apps and connected devices. They rely on Apptopia to better understand consumer behavior and intent across app-based devices to gain a competitive advantage.*

Door Dash Financials:

DoorDash annual net income/loss 2018 to 2021 ($mm)

Year	Net Income/Loss ($mm)
2018	-204
2019	-667
2020	-461
2021	-468

Sources: Company data [The Information]

DoorDash profit

DoorDash reported an annual net loss of $468 million in 2021, $7 million more than the previous year.

DoorDash annual net income/loss 2018 to 2021 ($mm)

Year	Net Income/Loss ($mm)
2018	-204
2019	-667
2020	-461
2021	-468

Sources: Company data [The Information]

Third-Party Partnership Mitigating Factors:

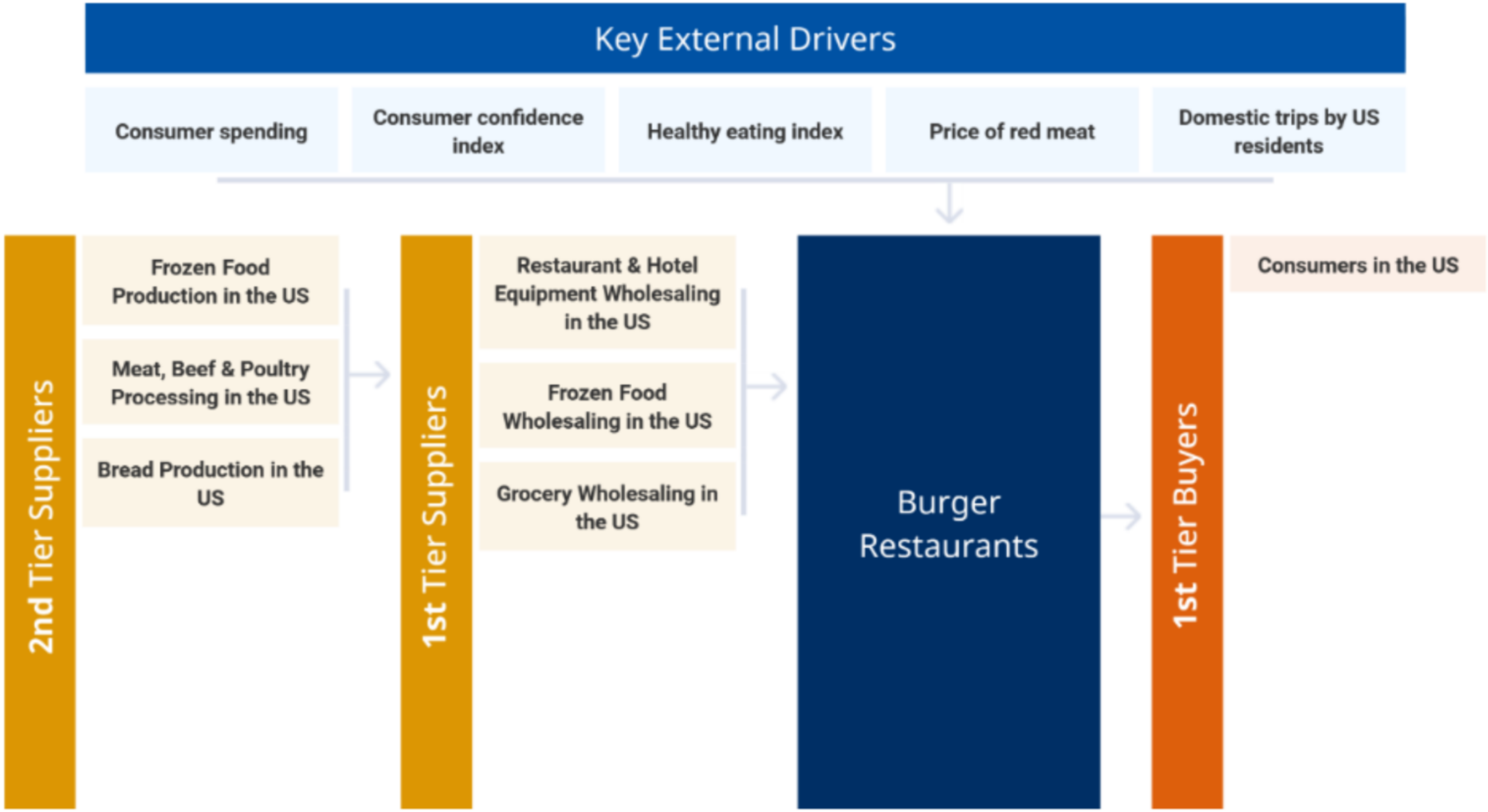
- Restaurants can enter customer consideration sets and increase awareness of delivery availability with platform presence
- Based on commentary from restaurant companies, presence across multiple platforms is also complementary
- There is relatively limited overlap between users of the largest delivery platforms and the largest pizza chains, suggesting opportunity for pizza chains to benefit from incrementality on platforms

Pizza Restaurants & Delivery Platforms Overlap

	Domino's	Pizza Hut	Papa John's
Uber Eats	21%	16%	10%
Grubhub	17%	12%	8%
DoorDash	17%	12%	9%
Postmates	21%	14%	9%

**Read starting from left column. Example: 21% of Uber Eats users engage with Domino's digitally, 16% of Uber Eats users use Pizza Hut and 10% of Uber Eats users also use Papa John's.*

Source: comScore, Credit Suisse estimates


Key External Drivers
Consumer spending
Consumer confidence index
Healthy eating index
Price of red meat
Domestic trips by US residents
2nd Tier Suppliers
Frozen Food Production in the US
Meat, Beef & Poultry Processing in the US
Bread Production in the US
1st Tier Suppliers
Restaurant & Hotel Equipment Wholesaling in the US
Frozen Food Wholesaling in the US
Grocery Wholesaling in the US
Burger Restaurants
1st Tier Buyers
Consumers in the US

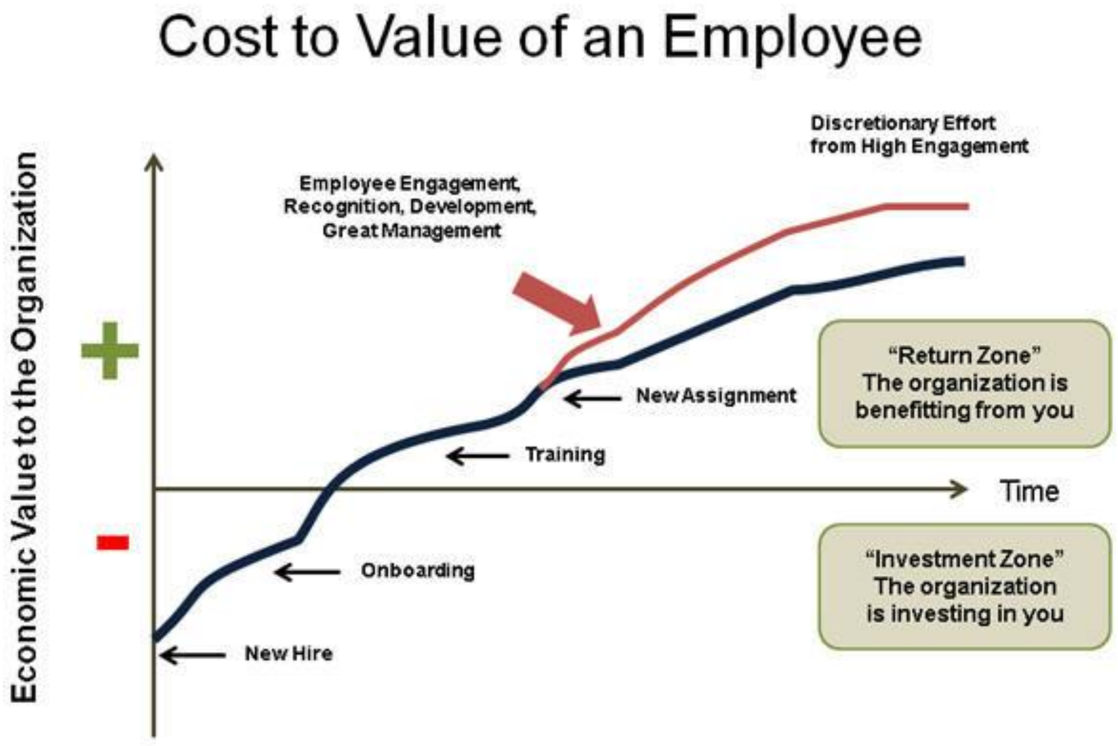
Customer Satisfaction: Branding

- Customer satisfaction is declining due to increased delivery wait times, smaller delivery windows, and fewer topping options, so the way to improve customer satisfaction is to:
- Focus on efforts to increase branding strength to align with employees and increase the customer base, which will drive growth
  - Using purpose branding to increase customer base:
    - Ads that focused on values earned the highest marks among consumers.
    - Brands with a high sense of purpose have experienced a brand valuation increase of 175% over the past 12 years, compared to the median growth rate of 86% and the 70% growth rate for brands with a low sense of purpose
    - Nearly two-thirds of millennials and Gen Z express a preference for brands that have a point of view and stand for something, the report found.
    - purpose gives brands a long-term competitive advantage, with the brands that consumers see as having a positive impact growing at 2x the rate of other brands.
      - https://www.marketingdive.com/news/study-brands-with-a-purpose-grow-2x-faster-than-others/521693/

Customer Satisfaction: Branding

- Using branding to increase employee acquisition and retention will reduce overall company VCs and increase revenue by having the workforce capabilities to decrease customer wait times and lengthen delivery window times.
  - Employees want to work for a company with purpose and values, and they want those purposes and values to be integrated in the workplace
    - According to McKinsey employers do not understand why employees are leaving: employees rate being valued by the company, valued by management, and sense of belonging as most important while employers view these factors as least important.
      - https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/great-attrition-or-great-attraction-the-choice-is-yours

Customer Satisfaction: Branding



Customer Satisfaction: Branding

- Employee turnover is extremely costly so reducing turnover will decrease variable costs
  - $1,500 for hourly employees
  - For a manager making $60,000 a year, that's $30,000 to $45,000 in recruiting and training expenses.
  - https://mnwi.usi.com/Resources/Resource-Library/Resource-Library-Article/ArtMID/666/ArticleID/782/Cost-of-employee-turnover#:~:text=The%20Society%20for%20Human%20Resource,in%20recruiting%20and%20training%20costs
  - Many studies show that the total cost of losing an employee can range from tens of thousands of dollars to 1.5-2X annual salary.
  - Consider the real "total cost" of losing an employee:
    - Cost of hiring a new person (advertising, interviewing, screening, hiring)
    - Cost of onboarding a new person (training, management time)
    - Lost productivity (a new person may take 1-2 years to reach the productivity of an existing person)
    - Lost engagement (other employees who see high turnover disengage and lose productivity)
    - Customer service and errors (new employees take longer and are often less adept at solving problems). In healthcare this may result in much higher error rates, illness, and other very expensive costs (which are not seen by HR)
    - Training cost (over 2-3 years you likely invest 10-20% of an employee's salary or more in training, that is gone)
    - Cultural impact (whenever someone leaves others take time to ask "why?").

    - https://www.linkedin.com/pulse/20130816200159-131079-employee-retention-now-a-big-issue-why-the-tide-has-turned/

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