

DMP EUROPE STRATEGY DAYS

Hamburg / Paris
27/28th May, 2024



INTRODUCTION

André ten Wolde
Europe CEO



PRESENTERS AND Q&A



MISJA VROOM
Benelux



**ALEXANDER
TAUER**
Germany



**JOEL
TISSIER**
France
(Tomorrow)

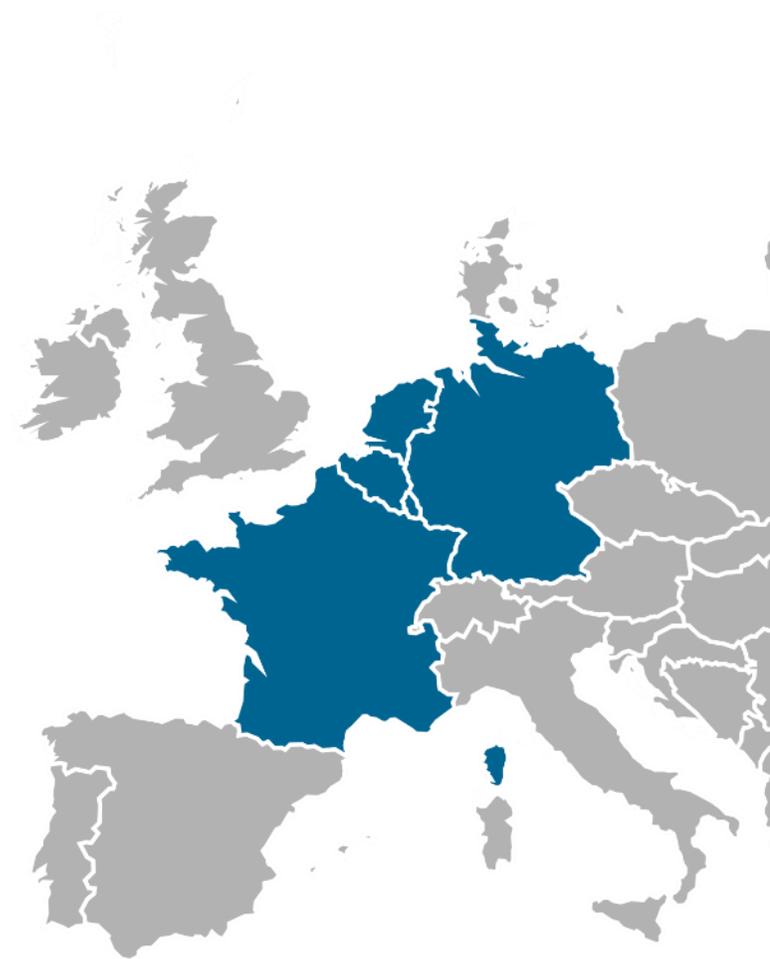


PRESENTATIONS

- **A HISTORY OF HOW WE GOT TO OUR CURRENT, PIZZA MARKET-LEADING POSITION**
- **THE SIZE OF DOMINO'S OPPORTUNITY IN OUR EUROPEAN MARKETS**
- **APPLYING A GLOBAL BRAND AND STRATEGY – WITH LOCAL NUANCE**
- **EUROPEAN LEADERSHIP: TECHNOLOGY AND OPERATIONS, FOOD, AND AGGREGATOR PLATFORMS**

FOLLOWED BY MARKET PRESENTATIONS BY BENELUX, GERMANY AND FRANCE CEOS:

- **SUCCESSFUL STRATEGIES WHERE DOMINO'S IS 'LEANING IN' TO CAPTURE OUR SHARE OF PIZZA, DELIVERY AND QSR**
- **INITIATIVES TO LIFT FRANCHISE PARTNER ENGAGEMENT AND BUY-IN ON PROVEN BUSINESS STRATEGIES AND PROGRAMS TO GROW SALES AND PROFITS**



A QUICK HISTORY LESSON – ACQUIRING BELGIUM, NETHERLANDS, FRANCE

- **JULY 2006: DOMINO'S PIZZA ANZ (DMP) ACQUIRED THE DOMINO'S OPERATIONS IN FRANCE, THE NETHERLANDS AND BELGIUM FROM DOMINO'S PIZZA INTERNATIONAL (DPI)**
- **Purchase price of €8.9m (A\$14.8m), Net assets of €7.2m and a 4 year expansion plan to spend a minimum of €10m (A\$16.6m)**
- **DOMINO'S EUROPE HAD:**
 - **153 stores (France 90, Netherlands 60, Belgium 3)**
 - **Network sales of A\$110m**
 - **A potential of > 1000 stores**
- **LOCAL MARKETS HAD BEEN OPENED BY A LOCAL OPERATOR, BUT HAD FAILED TO GROW, BEFORE BEING REPURCHASED BY DOMINO'S PIZZA INC. (DPZ)**
- **THESE MARKETS WERE LOSS MAKING ON DPE'S ACQUISITION FROM DPZ**

Implement DMP systems and processes to improve operating margins

Potential upside from targeted marketing (currently no TV)

Fast food remains a highly fragmented market

Fast food chains bring the following to a fragmented market

- Value pricing
- Strong branding/presence
- Economies of scale for purchasing and advertisement
- Flexibility to adapt to different markets

Source: Market presentation: Domino's Pizza Australia New Zealand Limited ("DMP") expands into European market. 1st May, 2006



A QUICK HISTORY LESSON – ACQUIRING GERMANY

- **FEBRUARY 2016: DOMINO'S PIZZA ENTERPRISES ENTERS GERMAN MARKET IN JV WITH DOMINO'S PIZZA GROUP (DPG) AND ACQUIRES JOEY'S PIZZA**
- **Purchase price of up to €25m (rights to Domino's Pizza brand) + € 2-3m (Domino's stores) and up to €79m (Joey's Pizza)**
- **DOMINO'S GERMANY + JOEY'S PIZZA HAD COMBINED:**
 - **232 stores (212 Joey's stores + 20 Domino's stores)***
 - **Network sales of A\$219m**
- **The prior German Domino's business (20 stores) had failed to reach scale and was not profitable**

IN EACH EUROPEAN MARKET, DMP ACQUIRED A SUBSCALE BUSINESS THAT WAS NOT THE #1 PIZZA CHAIN AND STRUGGLED TO REACH CRITICAL MASS

1. Conversion phase (0-2 years)
 - Focus on the brand conversion
 - Many areas in which Joey's Pizza does well and it wants to ensure that its customer insights and the best of its skills and culture are retained
2. Test phase (years 1-3)
 - Better understand the German market and learn how to execute DPE's strategic growth initiatives
3. Growth phase (thereafter)
 - Focus on store rollouts and initiatives to increase sales
 - Fully leverage the expertise and infrastructure of DPE's other regional markets

Source: DPE Market announcement, 16 December 2015



Note: DPE announced it would acquire 10-15 of the 20 stores operated by Domino's Pizza Group on forming the original JV

TODAY DOMINO'S EUROPE IS EXECUTING ON OUR OPPORTUNITY



1403
STORES

Incl. 990 stores in three original markets (vs 1000 target)



A\$1.59B
NETWORK SALES

FY23



\$52.9M
EBIT

FY23

Execution of the opportunity

DMP to employ a 'high volume mentality' like Australia and New Zealand with focus on:

1. Stores

- Develop network size to get to TV
- Open in A-grade locations with high impact signage

2. Sales

- Simple menu & value pricing
- More people and training
- Develop delivery & carry-out market
- Extend trading hours

3. Development and leverage of centralized infrastructure

- Marketing and advertising
- Consumer research & product development
- Europe wide buying power

Source: ASX announcement May 2006



DOMINO'S EUROPE IS EXECUTING ON OUR OPPORTUNITY

WE HAVE HAD SHORT-TERM CHALLENGES

- Global conflict on our doorstep
- COVID: not a benefit for some high carry-out order markets
- >20% cost inflation in Germany
- An acquisition in Denmark with brand damage from previous owners

BUT WE HAVE ALSO HAD NUMEROUS SUCCESSES

- Building sustainable and profitable markets where others had failed
- Producing a generation of successful franchise partners
- Integrating acquisitions and brands to build a stronger Domino's
- Growing to the largest pizza chain in each of our markets

WE HAVE A TRACK RECORD OF SUCCESS AND A PLAN FOR CONTINUED GROWTH



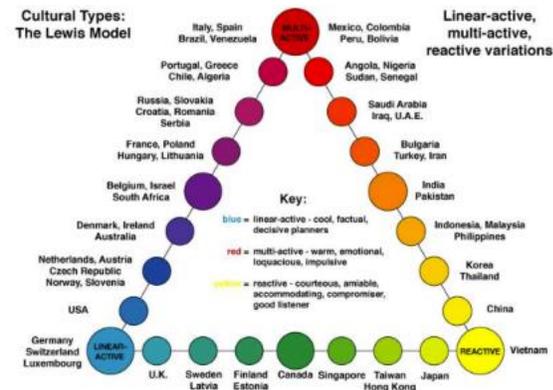
LOOKING BACK, WHAT HAVE WE PRESENTED BEFORE

- **CULTURE OF EUROPE**
HOW WE NEGOTIATE, COOPERATE AND MAKE DECISIONS
- **THE SIMILARITIES AND DIFFERENCES OF OUR CUSTOMERS' TASTE PREFERENCES**
- **NETWORK PENETRATION**
INCLUDING COMPARISONS BETWEEN DPE MARKETS AND QSR COMPETITORS

ONE EUROPE?

Culture is important as it decides:

- How opinions are formed and decisions are taken
- How people negotiate, deal with conflicts or problems
- How people co-operate and communicate



Source: 2021 Investor Presentation

OUR LONG-TERM VISION FOR THE POTENTIAL OF OUR MARKETS REMAINS CLEAR



LOOKING AT EUROPE THROUGH AN 'AUSSIE' LENS

MYTHS

FACTS

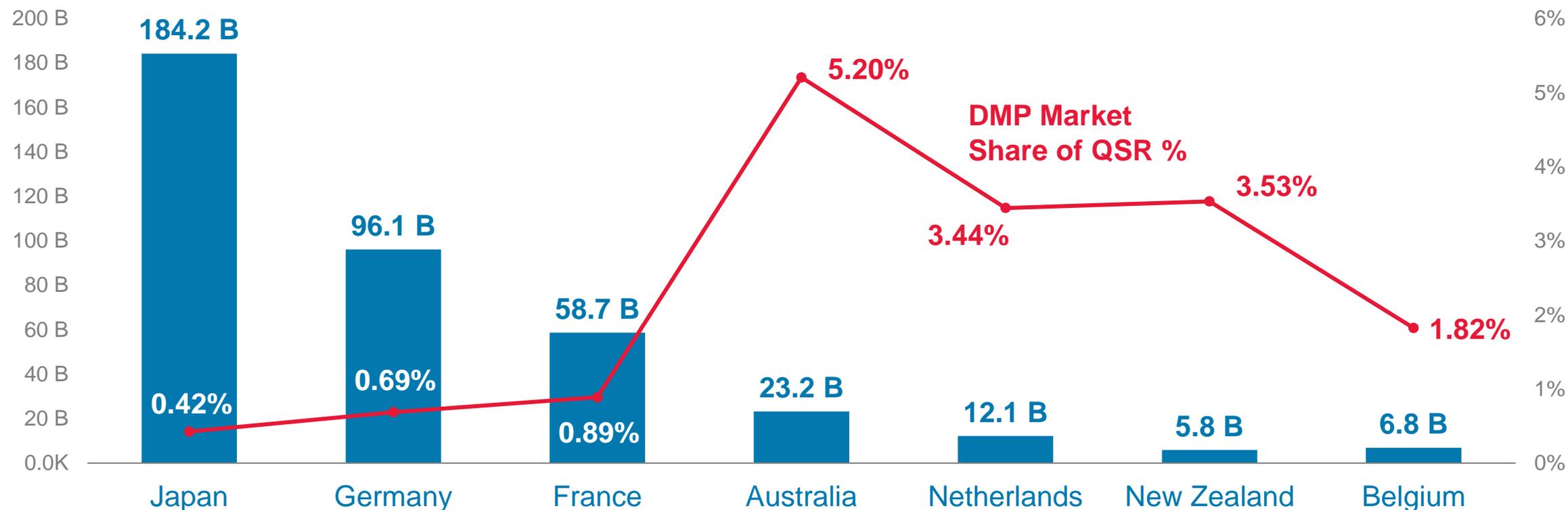
- Europeans are some of the largest pizza consumers in the world
- Europe has a vibrant QSR landscape, with the largest American brands competing with home-grown brands and local favourites
- Successful brands can tailor their offering to meet local flavour preferences
- Domino's Pizza Enterprises Ltd has proven our ability to build thriving businesses where others could not

- Europeans don't eat pizza
- Europeans don't like 'fast food'
- Europeans don't like 'American brands'
- Pizza can't be adapted to meet local taste preferences
- It's too difficult to do business in Europe



SIZE OF THE PRIZE

Total Market Size of QSR (billion AUD) 2023



WE ARE A SMALL COMPONENT OF A LARGE AND GROWING QSR MARKET



IF WE MATCHED OTHER MARKETS



ROOM TO GROW



Market	Store Count	Population	Population/store
Australia long-term outlook	1000	26.0 million	26,000
Benelux long-term outlook	900	30 million	33,300
Australia (current)	750	26.0 million	34,666
New South Wales (current)	201	8.17 million	40,626
Netherlands (current)	373	17.9 million	48,117
Benelux (current)	512	30.0 million	58,593
Europe long-term outlook	2900	182 million	62,771
France long-term outlook	1000	68.4 million	68,400
Germany long-term outlook	1000	83.8 million	83,800
France (current)	482	68.4 million	141,908
Germany (current)	409	83.8 million	205,392

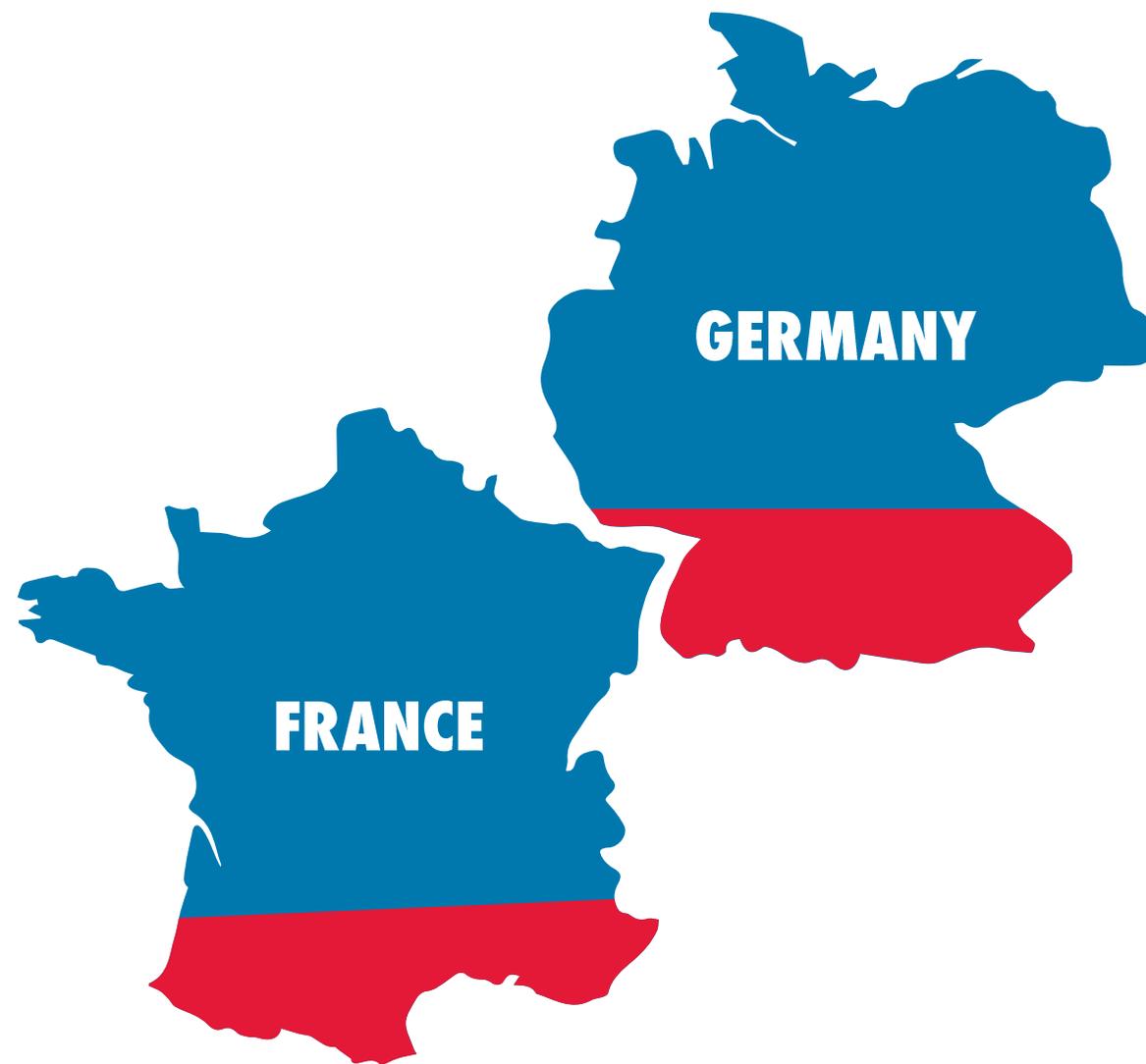
WE DON'T NEED TO REACH AUSTRALIAN LEVELS OF CUSTOMER FREQUENCY OR STORE PENETRATION TO REACH OUR POTENTIAL

WE HAVE ALREADY DEMONSTRATED IN THE BENELUX OUR LONG-TERM STORE ROLL-OUT IS ACHIEVABLE, IN A LOWER FREQUENCY MARKET



**IN SOME OF OUR BIGGEST
OPPORTUNITY MARKETS
GERMANY AND FRANCE,
WE CURRENTLY COVER JUST**

30%
OF THE COUNTRY

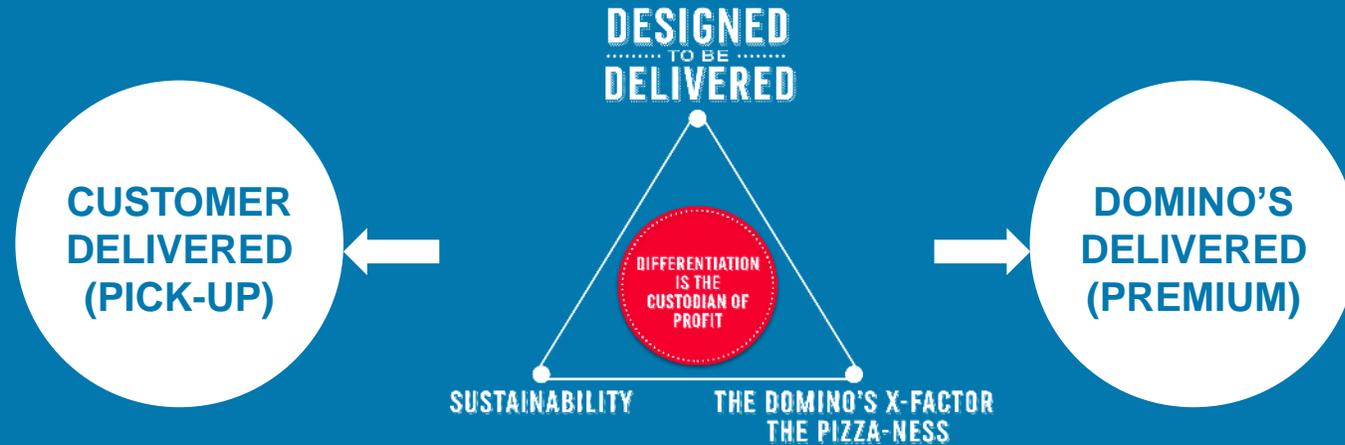


THE DOMINANT SUSTAINABLE DELIVERY QSR IN EVERY MARKET BY 2030

Mission

Inspired Products & Services

Designed for Delivery



That are high quality and delivered quickly for an affordable price

$$\text{Value} = (\text{Product} + \text{Service} + \text{Image}) / \text{Price}$$

PRODUCT QUALITY: 4.5 DELIVERY: 18 MINS. NET PROMOTER SCORE

LUNCH: MY BOX SNACKING: MELTZZ BUNDLES

For all meal occasions

LATE NIGHT DRINKS



DIFFERENCES vs SIMILARITIES ACROSS EUROPE

DIFFERENCES

- LANGUAGES
- CULTURES
- FLAVOUR PREFERENCES
- LEGAL REQUIREMENTS
- COMMUNICATIONS STYLES
- CARRY-OUT VS. DELIVERY SHARE

SIMILARITIES

- PRODUCT QUALITY MATTERS
- DELIVERY TIME MATTERS
- FORTRESSING
- AGGREGATORS ARE INCREMENTAL
- VALUE EQUATION:
Product + Service + Image / €



APPLYING BEST PRACTICE TO ALL MARKETS

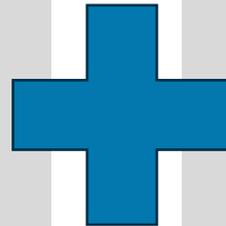
BEST PRACTICE

CENTERS OF EXPERTISE

- Develop and share best practice
- CoEs are well progressed in ANZ
- Global contracts with international partners (e.g. Uber)
- Examples include aggregator marketing, operational standards and talent development

GLOBAL SHARED SERVICES

- Providing back-of-house support functions across all markets
- Progressing support centres in Asia and Europe
- Examples include Finance, Customer Feedback



LOCAL OWNERSHIP

LOCAL CEOS AND LEADERSHIP

- Franchise partner engagement
- Execution of Company strategy
- Building high-performing teams to deliver growth
- Implementing and translating global best practice and systems with local cultural applications



A GLOBAL STRATEGY WITH LOCAL NUANCE

GLOBAL

- Brand, operations and safety standards consistent globally
- Business strategy and standards
- Digital infrastructure: OneDigital online ordering, Mobile APP, Snowflake data lake, sales polling, Pulse Point Of Sale
- Financial controls
- Brand custodianship

REGIONAL

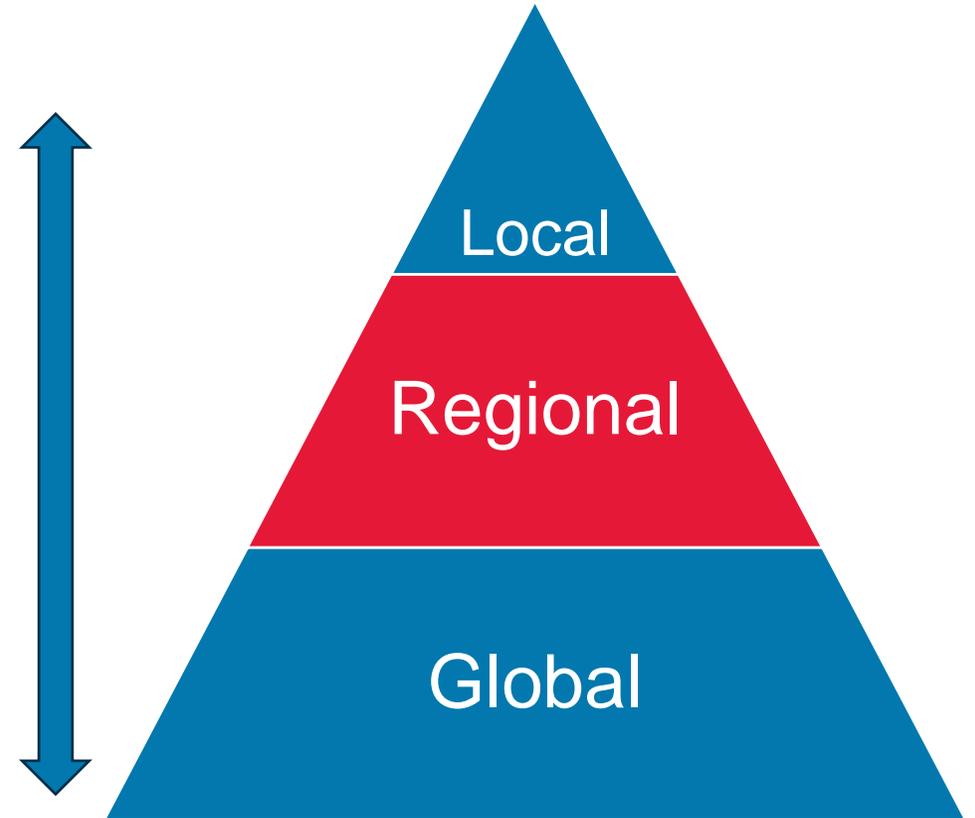
- Procurement of key ingredients: European cheese contract, tomatoes for pizza sauce and flour for dough
- Regionally specific customer facing technology: in-store kiosks, Loyalty program (built onto OneDigital)
- Marketing structure: including media mix modelling and electronic Direct Mail

LOCAL (meeting global standards, implemented locally)

- Local interpretation of global brand
- Store development, and operations
- Menu development catering to specific customer preferences and business requirements, & procurement to supply this
- Locally relevant marketing built on regional and global technology, in local languages and cultures

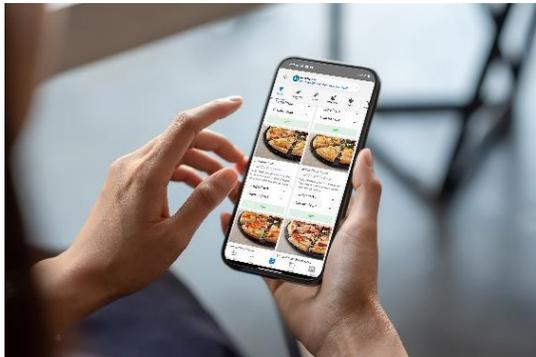
Locally developed and successful operations, technology, and food innovation can also be applied across the region, and the globe.

e.g Aggregator strategy, loyalty program, eBike delivery, cheese & garlic scrolls, Golf (efficient dough shipping)



BRAND

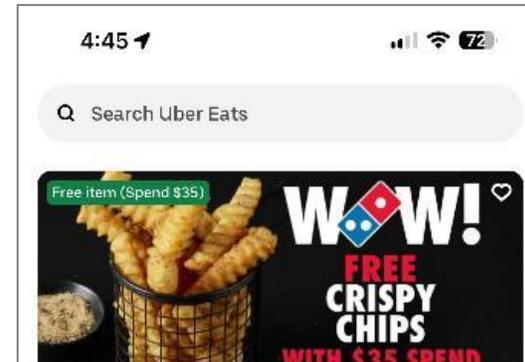
GROWING THE DOMINO'S BRAND IN ALL MARKETS THROUGH INSPIRED PRODUCTS AND SERVICE



**Leveraging our
Technology and
Operations**



**Marketing Products
that Inspire**



**Playing to win inside
aggregators**



**Our world-class
delivery team; in
branded uniforms
and vehicles**

AND LEVERAGING IT TO WIN IN ALL CHANNELS



EUROPE HAS FREQUENTLY SHOWN THE WAY

PRODUCT

- Pizza-dogs
- Loaded fries
- Dutch Pancakes
- Scrolls

OPERATIONS

- The building blocks of Domino's 3TEN including Ebike delivery
- 1845 (fast delivery + high PQ)
- Kiosk ordering
- Loyalty
- Priority ordering
- Order Anywhere

PEOPLE

- CEOs (Japan, SE Asia)
- Digital
- Data (S&I)
- ESG

AGGREGATORS

The digital food court for incremental customers ready to eat NOW



MARKETING PRODUCTS THAT INSPIRE



DOMINO'S EUROPE HAS CREATED SOME OF THE BEST INSPIRED NEW PRODUCTS, FLAVOURS AND TECHNOLOGY IN THE DOMINO'S WORLD*

FROM DUTCH PANCAKES AND GARLIC SCROLLS TO ORDER ANYWHERE, THESE INSPIRED PRODUCTS AND SERVICES HAVE BEEN LOVED BY CUSTOMERS AROUND THE WORLD

ONE OF THE MANY STRENGTHS OF THE DOMINO'S SYSTEM IS WE CAN CREATE AND SHARE NEW FOOD IDEAS, DESIGNED TO BE DELIVERED, DESPITE USING DIFFERENT CORE INGREDIENTS

***Note: we accept we may be biased, but we're very proud of them**



LEVERAGING OUR TECHNOLOGY AND OPERATIONS

OUR EUROPEAN OPERATIONS HAVE TRADITIONALLY LED THE DOMINO'S WORLD (NOT JUST DPE) ON FAST DELIVERY TIMES

A BIKE-CENTRIC CULTURE SHOWED OTHER MARKETS WHAT WAS POSSIBLE THROUGH EBIKE DELIVERIES:

FASTER, SAFE DELIVERIES + IMPROVED PRODUCT QUALITY AT A LOWER COST

EUROPE HAS ALSO BUILT ON GLOBAL TECH INFRASTRUCTURE TO LAUNCH LOCALLY-RELEVANT TECHNOLOGIES (INCLUDING LOYALTY PROGRAMS AND IN-STORE KIOSKS), WHICH HAVE BEEN TESTED AND/OR IMPLEMENTED IN OTHER MARKETS



Domino's Club



Erstelle einen Account und sammle Punkte für eine Gratispizza.

[Account erstellen](#)

Du hast bereits einen Account? [Anmelden](#)

Domino's Club



BEI JEDER BESTELLUNG ÜBER 10€ WIRST DU BELOHNT
60 PUNKTE



1 Gratispizza Coupon verfügbar

[Jetzt einlösen](#)



WE ARE LEADING THROUGH DELIVERY

DURING COVID, DOMINO'S EUROPE LIFTED TO MEET THE DEMAND FOR DELIVERED FOOD, AS CARRY-OUT DECLINED

DOMINO'S DEMONSTRATED OUR DELIVERY EXPERTISE, AND SUSTAINABLE MODEL: PROFITABLE FOR FRANCHISE PARTNERS AND VALUE FOR CUSTOMERS

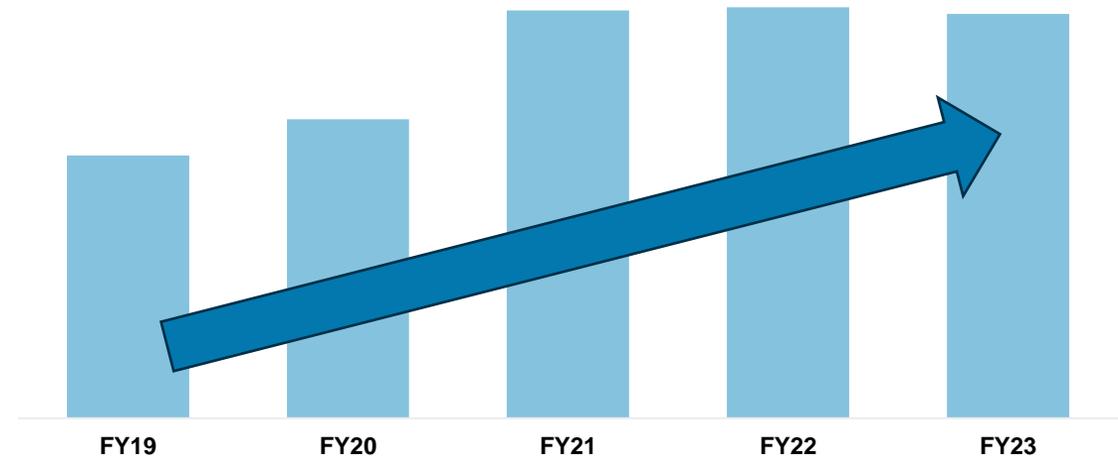
THIS EXPERIENCE ENSURED POST-COVID WE RETAINED THE MAJORITY OF THESE CUSTOMERS, SALES AND ORDERS

DOMINO'S OUTPERFORMED COMPETITORS, WITH ORDER COUNTS HIGHER THAN PRE-COVID IN ALL MARKETS

WE ARE NOW REBUILDING ORDER COUNTS CHALLENGED BY INFLATIONARY PRESSURES

EUROPE DELIVERY SALES PRE- AND POST-COVID

+54%



EUROPE LED THE DOMINO'S WORLD ON AGGREGATORS

- EUROPE HAS 20+ YEARS EXPERIENCE WORKING WITH ORDER AGGREGATORS. Our initial Netherlands orders were all via aggregators
- THE DATA IS CLEAR: AGGREGATOR CUSTOMERS ARE A DIFFERENT CUSTOMER: INCREMENTAL AND PROFITABLE
- THESE PLATFORMS ARE A MASSIVE ONLINE FOOD COURT FOR NEW CUSTOMERS
- BY USING OUR OWN, BRANDED DELIVERY FLEET, WE FULFIL AGGREGATOR CUSTOMERS YEAR-ROUND, AND OUTPERFORM DURING PERIODS OF ADVERSE WEATHER AND HIGH DEMAND, WHERE CONTRACTORS SUPPORTING COMPETITORS ARE UNABLE TO MEET THE MOMENT
- AGGREGATOR PLATFORMS ARE 'WINNER TAKES MOST' WITH THOSE RANKING HIGHLY WINNING MOST OF THE SALES
- WE DELIVER – OUR FEES TO AGGREGATORS ARE LOWER, WITH A LOWER COST DELIVERY FLEET
- WE ARE TRIALLING 3RD PARTY DELIVERY IN NON-CORE TIMES TO GROW HIGHLY PROFITABLE INCREMENTAL SALES



PLAYING TO WIN INSIDE AGGREGATORS

THERE IS A DIFFERENCE BETWEEN BEING 'ON' THE AGGREGATORS, AND BEING 'ALL IN'
FRANCHISE PARTNER ENGAGEMENT IS CRUCIAL TO TAKE SHARE AND GROW SALES ON THESE IMPORTANT PLATFORMS

INVEST IN
VISIBILITY
ON THE PLATFORMS &
ON THE STREET

PROMOTE
PRODUCT & VALUE
FOR CONVERSION

BUILD
INFRASTRUCTURE
FOR FLAWLESS
OPERATIONS FROM ORDER
TO THE FRONT DOOR

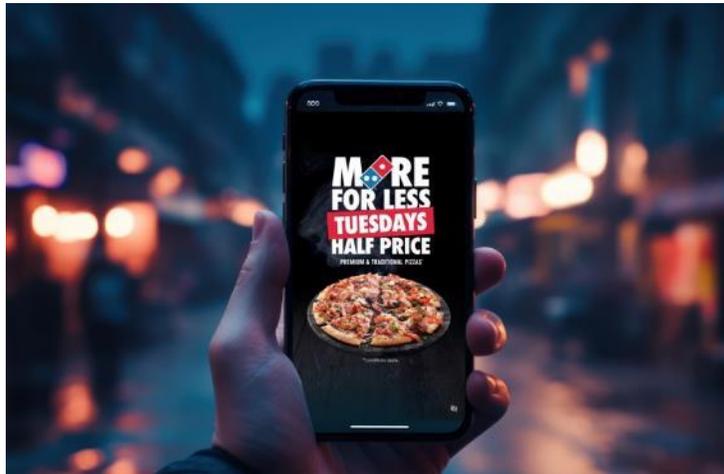
**TO BE THE DOMINANT, SUSTAINABLE DELIVERY QSR
WE HAVE TO BE THE DOMINANT PLAYER INSIDE THE AGGREGATORS**



MARKETS IN FOCUS - ANZ & GERMANY



Strong growth in aggregators



Improved use of media \$\$\$



Inspired product launches



MARKETS IN FOCUS – FRANCE AND JAPAN

Successful approaches from other markets are being applied – but more time is required

Inspired
new
product

Consistent
pricing with
lower entry
point

Wider
adoption of
proven
promotions

Winning
inside
Aggregators

France

- Products including Burger Pizza range resonate locally
- My Domino's Box allows a low-entry point for customers
- Franchisee engagement, including aligning on marketing and pricing, does require more time

Japan

- Inspired new products have been well received
- Low order frequency takes time to gain traction with customers
- A barbell menu remains essential, particularly for carry-out

An uplift in average weekly order counts is needed to rebuild unit economics, and this work is ongoing



OUR FUTURE

- **WE HAVE SIGNIFICANT ROOM TO GROW IN ALL MARKETS, WITH OUR SUCCESS IN MARKET PENETRATION IN THE BENELUX (A LOWER-FREQUENCY MARKET) DEMONSTRATING WHAT IS POSSIBLE**
- **DOMINO'S IN EUROPE HAS A LONG TRACK RECORD OF SUCCESS IN BUILDING TO A MARKET-LEADING POSITION IN ALL COUNTRIES**
- **OUR TEAMS HAVE EXTENSIVE DOMINO'S, EUROPEAN, AND COUNTRY EXPERIENCE TO EXECUTE ON OUR PLANS**
- **CENTRAL TO OUR SUCCESS IS APPLYING A GLOBAL STRATEGY (AND SUPPORTING INFRASTRUCTURE) AND TAILORING TO LOCAL NUANCES AND PREFERENCES**
- **WE ARE OVERCOMING SHORT-TERM HEADWINDS AND INTEND TO DELIVER ON OUR LONG-TERM OPPORTUNITY**



**WE ARE
THE DOMINANT
SUSTAINABLE
DELIVERY QSR**

**IN EVERY
MARKET BY**

2030



Benelux

Misja Vroom

CEO Domino's Benelux

Anneke de Groot

CEO Belgium & Luxembourg



EXECUTIVE SUMMARY

- **DOMINO'S NETHERLANDS WAS THE 2ND LARGEST PIZZA CHAIN (AND BELGIUM HAD ONLY THREE STORES) WHEN ACQUIRED BY DPE – THE BENELUX HAS SINCE DEVELOPED A TRACK RECORD OF MARKET-LEADING SUCCESS**
- **WORLD-CLASS OPERATIONS, INSPIRED MENU INNOVATION, PIONEERING TECHNOLOGY – THE BENELUX HAS SHARED SUCCESSES WITH OTHER DPE MARKETS**
- **RECENT LABOUR INCREASES IN THE NETHERLANDS HAVE BEEN A HEADWIND FOR SHORT-TERM SALES GROWTH, BUT THE TEAM ARE APPLYING PROVEN STRATEGIES TO GROW SALES AND PROFITS FOR FRANCHISE PARTNERS**
- **DESPITE DOMINO'S MARKET-LEADING POSITION IN PIZZA, WE ARE STILL A SMALL PART OF A LARGE QSR MARKET WITH ROOM TO GROW**



DOMINO'S NETHERLANDS & BELUX MANAGEMENT TEAM



MISJA VROOM
CEO BENELUX
30 YEARS AT DOMINO'S

Misja started at a young age as a store manager at Domino's and quickly grew within the organization. Not only has he gained broad experience within operations and contributed to the success and growth within the Belgian market, he has also been a Franchise Partner himself. With his knowledge and experience, he now leads the Benelux market for many years.



ANNEKE DE GROOT
CEO BELGIUM, LUXEMBOURG
12 YEARS AT DOMINO'S

Starting as a franchise recruiter in the Dutch market, Anneke quickly progressed to work for the Belgian market as well. After several years as Head of Development in the Netherlands, she has been responsible for the countries Belgium and Luxembourg for 2 years now. With her command of the French language, she knows how to build bridges within the bilingual Belgian landscape of Franchise partners and customers.



CASPER MOOYMAN
CMO BENELUX
9 YEARS AT DOMINO'S

Casper is a passionate and all-round marketing professional with digital marketing and eCommerce as a solid base. With his broad knowledge of (digital) marketing, his strength is to translate business and brand objectives into strategy and execution. He demonstrates this in his management of marketing within the Benelux market



BRAM VERHOEVE
COO BENELUX
13 YEARS AT DOMINO'S

Bram started delivering pizzas as a side job. He enjoyed it so much that he stayed another 10 years to learn and seize every opportunity in a fast-growing franchise organization. He then continued to develop his career in other, international organizations and became a senior executive with extensive knowledge and experience in the world of retail and franchising. He returned to Domino's in 2021 and has since then been operations director for Benelux.



RICHARD DE GRUIJTER
CFO EUROPE + BENELUX
17 YEARS AT DOMINO'S

As Chief Financial Officer Europe, Richard is responsible for the Finance departments in our European market and the roll-out of our new shared service roles. He is responsible for the financial operations of our markets, covering financial accounting, planning and reporting, balance sheet and tax. Richard has a Master of Business Economics and over 20 years of experience in senior finance positions in food, non-food and retail organizations such as McDonalds and Vodafone.



SABINE KRIJNEN
HEAD OF LEGAL BENELUX
11 YEARS AT DOMINO'S

With an extensive knowledge of international and European law, as well as social and political law, Sabine is a strong advisor in the field of legal. Within Domino's she has demonstrated her extensive in the legal field and today she directs her team of legal professionals within the Benelux.



LEA RUIJSDAM
HR BUSINESS PARTNER BENELUX
20 YEARS AT DOMINO'S

Lea is the expert on human resources within our market. In addition to her commitment to HR duties, she is known as a very people-oriented manager, whose work also focuses on employee satisfaction, employer branding and strengthening our precious Domino's culture



MANON STOUTJESDIJK
HEAD OF COMMUNICATIONS BENELUX
3 YEARS AT DOMINO'S

Manon is the Head of Communications for Domino's Pizza Benelux. She joined Domino's in 2021 and has more than 7 years' experience in communications, public relations and corporate affairs. In her role, she is responsible for managing corporate communications and issues management, consumer public relations and corporate social responsibility.



DOMINO'S NETHERLANDS & BELUX MANAGEMENT TEAM



SANDER WAIJERS
CORPORATE OPS NL
22 YEARS AT DOMINO'S

Sander started at a young age as a delivery driver at Domino's and then held various positions within our company until 2013. He then owned his own lunch and catering business. Since 2023 he's back at Domino's. After fulfilling the role of Operations Manager, he has been Head of Corporate Stores since January, using his extensive operational knowledge and background as an entrepreneur.



ELVIS HUSKIC
HEAD OF PARTNERSHIPS NL
18 YEARS AT DOMINO'S

Elvis started at Domino's with a side job in Warehouse and dough production. He developed himself within Domino's and began leading the Transportation, Warehouse and Production departments. From 2016 to 2018, he worked for Domino's Pizza International as an International Supply chain consultant. In 2018 he returned to Domino's Netherlands as Head of Commissary and in 2023 he started the role as Head of Partnerships where he's responsible for our Benelux partnerships.



ARJAN VERWER
HEAD OF DEVELOPMENT NL
26 YEARS AT DOMINO'S

Arjan started as a pizza delivery driver more than 25 years ago and progressed to store manager and franchise consultant. He worked for Domino's Pizza International for several years as a Business Consultant and then returned to DPNL as Head of Corporate Stores. He is now in charge of the Development Department for almost two years and his responsibilities include building and opening new stores and identifying franchise partners.



MARC PEERAER
HEAD OF DEVELOPMENT BELUX
11 YEARS AT DOMINO'S

Marc has extensive knowledge of food, hospitality and franchising and has been working for Domino's Belgium for over 11 years. He has been Operations Consultant and Head of Operations and is now responsible for the Development department. In his role he focuses on continuing the growth of our store network and identifying franchise partners for our Belgian market.



SOFYAN AL IBRAHIMI
HEAD OF OPERATIONS BELUX
5 YEARS AT DOMINO'S

Sofyan joined Domino's in 2019 after extensive experience in the pizza industry. He started his Domino's career as a Franchise consultant and worked his way up to Head of Operations BELUX. His outstanding knowledge in product quality and service, and his good relationship with our Franchise Partners earned him the title of MVP in 2021.



YAHRI TILLEMANS
MARKETING MANAGER
BENELUX
AT DOMINO'S SINCE 2024

As Marketing Manager Benelux, Yahri is responsible for rolling out the marketing strategy in our markets. With her 5+ years as Head of Marketing within the fashion industry and her knowledge of the complex Belgian landscape she's a valuable addition to the Domino's LT.



The Netherlands

1989 – First Domino's store in NL

**2006 – Acquired by Domino's
Pizza Enterprises Ltd** (60 stores vs NY
Pizza 73 stores)

2018 – 250 stores in NL



Country overview Netherlands

Area	Population	Store count	Population per store
Benelux long-term outlook	30.000.000	900	33,300
Groningen	601.510	16	37.594
New South Wales (Australia)	8.170.000	201	40.626
Noord-Brabant	2.644.872	63	41.982
Overijssel	1.189.079	26	45.734
Drenthe	504.116	11	45.829
Netherlands (current)	17.900.000	373	47,989
Gelderland	2.149.057	44	48.842
Zeeland	391.657	8	48.957
Zuid-Holland	3.840.662	78	49.239
Limburg	1.133.174	23	49.268
Flevoland	450.920	9	50.102
Friesland	661.956	13	50.920
Utrecht	1.400.187	27	51.859
Noord-Holland	2.980.494	55	54.190



COUNTRY POPULATION: 17.9 MILLION

AVERAGE OF 47,989 PEOPLE PER 1 STORE



QSR MARKET OVERVIEW NETHERLANDS



- Domino's has the largest number of stores in the QSR Market in NL (373) and is bigger than McDonalds by store count
- The Netherlands is a leading example of our fortressing strategy – winning share through superior delivery times and brand awareness
- When DPE acquired the market, New York Pizza was the largest pizza chain
- QSR's like Subway, Bakker Bart and Papa Johns are getting smaller.
- The main focus is to grow brand consideration (Domino's brand awareness is already on 95%), and market share.



PIZZA MARKET OVERVIEW NETHERLANDS

WE ARE MAINTAINING SHARE IN A GROWING PIZZA MARKET

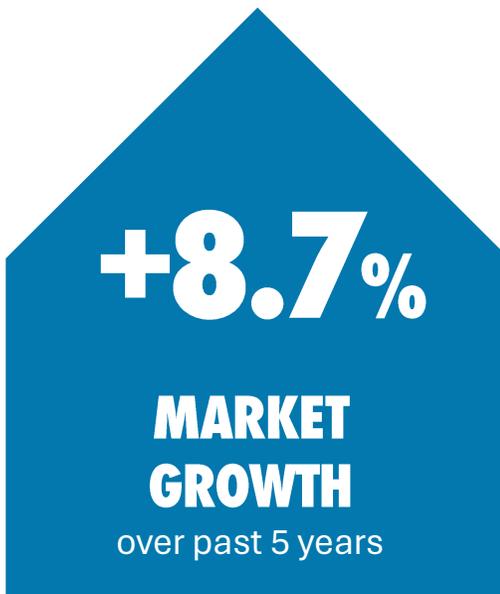
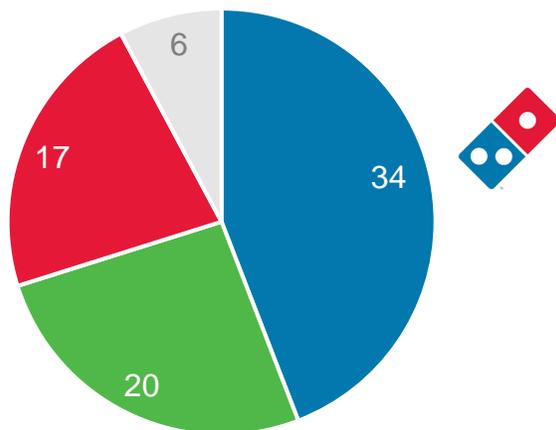
373 stores

293 stores

38 stores



Market share % (sales)



■ Domino's ■ New York Pizza ■ Other within fastfood/cafetaria ■ Other



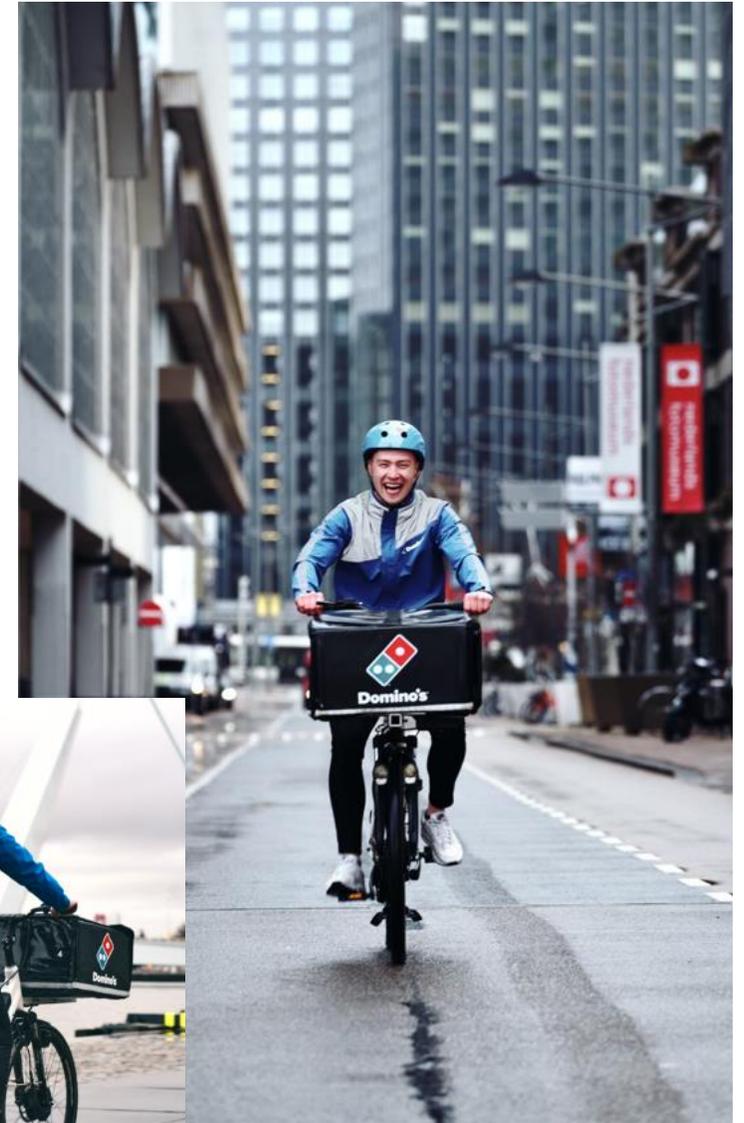
A TYPICAL CITY - Rotterdam

Rotterdam is a dynamic city known for its modern architecture and the biggest harbour of Europe. Although the city is only a fraction smaller than Amsterdam, it has a completely different look and feel than the capital. The city is characterised by an imposing skyline of skyscrapers and modern design.

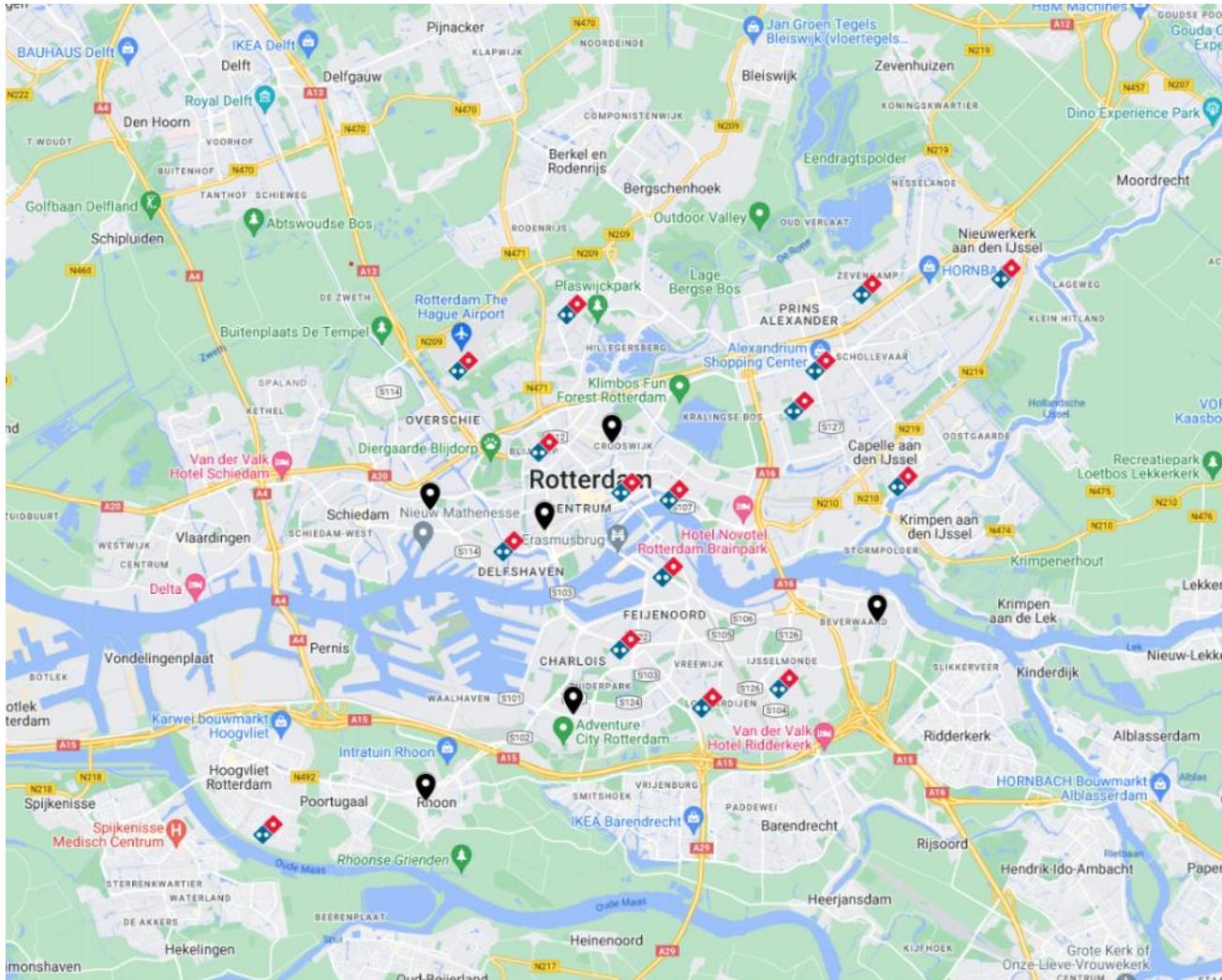
With an impressive number of 16 Domino's locations in Rotterdam, you can't visit the city without seeing a Domino's store or one of our drivers.

Domino's for Good (DFG) fact: Almost 100% of our deliveries in Rotterdam takes place on an electric vehicle.

DFG fact: Last year our drivers delivered a healthy breakfast at schools in Rotterdam, contributing to equal opportunities for all.



A TYPICAL CITY - Rotterdam



City	Population / stores
Groningen	27.092 (+ 1 potential store)
Benelux (long-term outlook)	33.300
Eindhoven	35.206 (+ 2 potential stores)
Delft	36.524 (+ 1 potential store)
Rotterdam	41.945 (+ 6 potential stores)
Vlissingen	45.410 (+ 2 potential stores)
Netherlands (current)	47.989
Utrecht	62.401 (+ 4 potential stores)
Weesp	22.080 / 0 stores

Total store count Rotterdam: 16 stores with a targeted six additional stores

Note: colour shadings are for visual representation only, and do not represent the potential or unit economics of individual cities or regions. They are also not comparable across markets.



DOMINATING DELIVERY

- DOMINO'S BENELUX HAS A PROVEN TRACK RECORD OF CONSISTENT GROWTH IN DELIVERY SALES (€) AND CUSTOMER COUNTS
- FOLLOWING COVID PEAKS, THE BENELUX RETAINED ALMOST 100% OF DELIVERY SALES (€) DRIVEN THROUGH HIGHER TICKET
- OUR FOCUS IS ON GROWING SALES AND CUSTOMER COUNTS

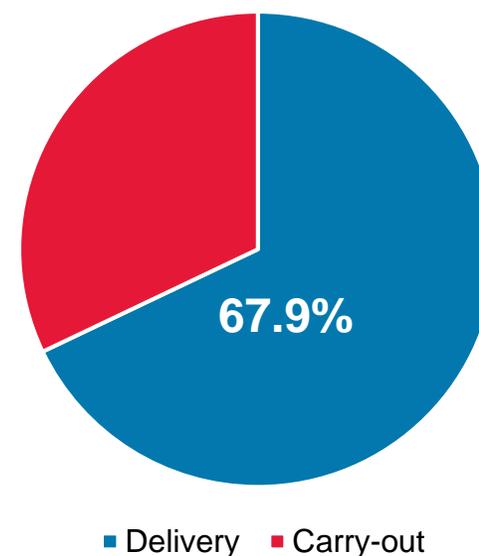
**DELIVERY SALES
GROWTH (€)**
(pre-COVID to post-COVID)

+58%
(FY19-FY23)

**Delivery
SHARE**
(pre-COVID to post-COVID)

+200bps
(FY19-FY24 YTD)

SALES BY SERVICE METHOD FY24



Dominating Delivery NL

Aggregators are an important **INCREMENTAL** sales platform

Total aggregator share of digital sales: 27%

Aggregators in NL:

1. JustEat/TakeAway

Dominant *order* aggregator

Active for Domino's: +/- 20 years

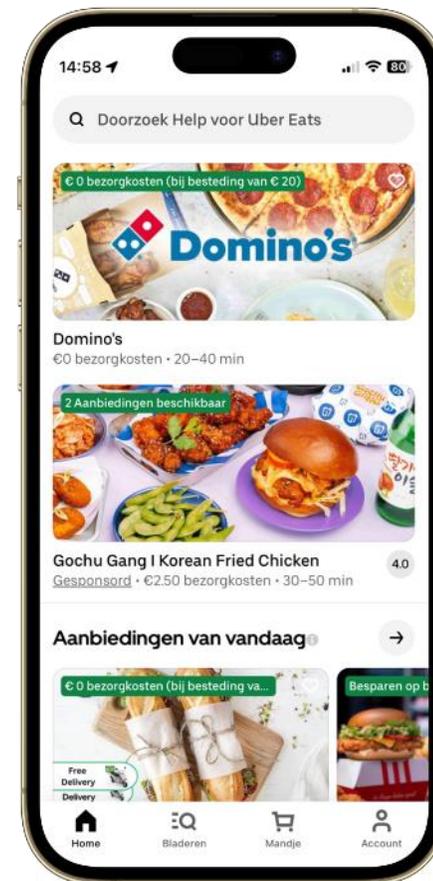
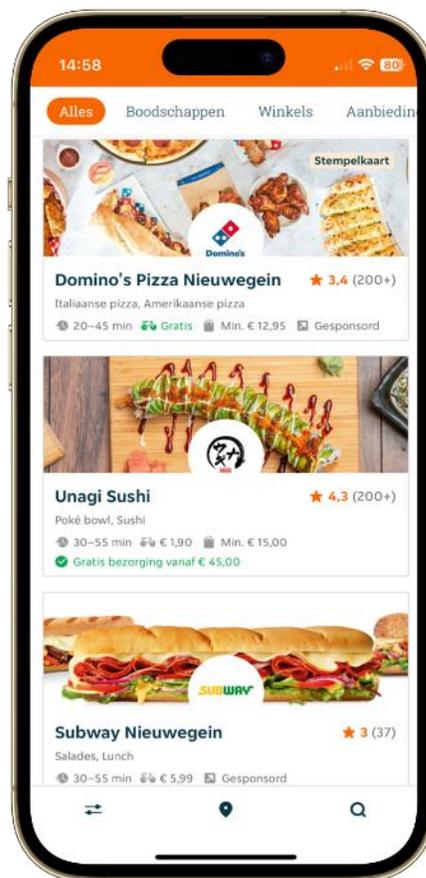
Order share from digital sales: 23%

2. UberEats

Dominant *delivery* aggregator

Active for Domino's since: 2022

Order share from digital sales: 4,5%



Uber Eats



Dominating Delivery NL

Aggregators are an important INCREMENTAL sales platform

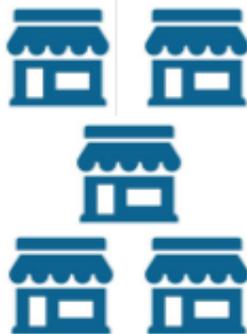
Right now, we are focusing on onboarding more stores to Uber Eats due to the opportunity to reach more customers.

More stores on aggregators = more incremental orders.

The Netherlands has led the way in aggregator strategy, showing these are a market place court for additional customers



January '24
35 stores on
Uber Eats



May '24
203 stores on
Uber Eats



Uber Eats



Dominating Delivery

The 'Flitsbezorgers' (flash delivery companies) who grew fast in the Netherlands in recent years have almost all left the market.

They were successful and innovative during COVID-19 but higher costs, slowing economic growth, and more cautious consumer behavior led to worse results.

Domino's have shown that we are experts in the delivery market with a sustainable delivery model

With the exit of Deliveroo, Getir, Gorillas and Zapp, only Flink is left.

We see opportunities to further strengthen our dominance in delivery.

This also provides opportunities to recruit new drivers to meet delivery demand.



▲ De flits- en boodschappenbezorger Deliveroo vertrekt waarschijnlijk eind dit jaar uit Nederland. © ANP / ANP

Maaltijdbezorger Deliveroo wil eind dit jaar weg uit Nederland

UPDATE De Britse maaltijd- en boodschappenbezorger Deliveroo vertrekt waarschijnlijk eind dit jaar uit Nederland. Het platform zegt dat het vindt dat het zelf niet groot genoeg is in het land om voldoende winst te maken.

NOS Nieuws - Gisteren, 17:12

Zo snel als de flitsbezorgers kwamen, zo snel knijpen ze in de remmen



Belgium & Luxembourg

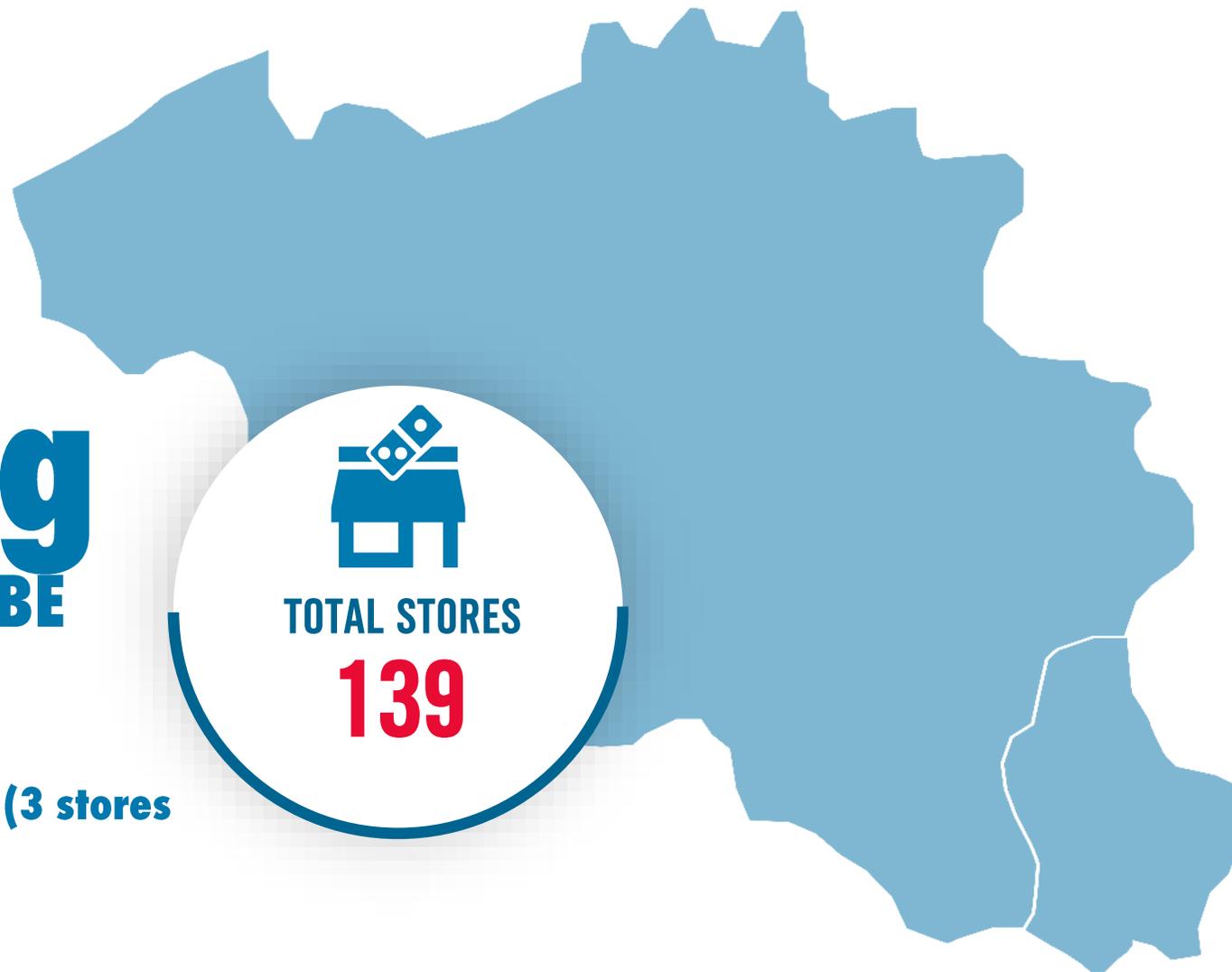
1994 – First Domino's store in BE

**2006 – Belgium acquired by
Domino's Pizza Enterprises Ltd (3 stores
vs Pizza Hut 74 stores)**

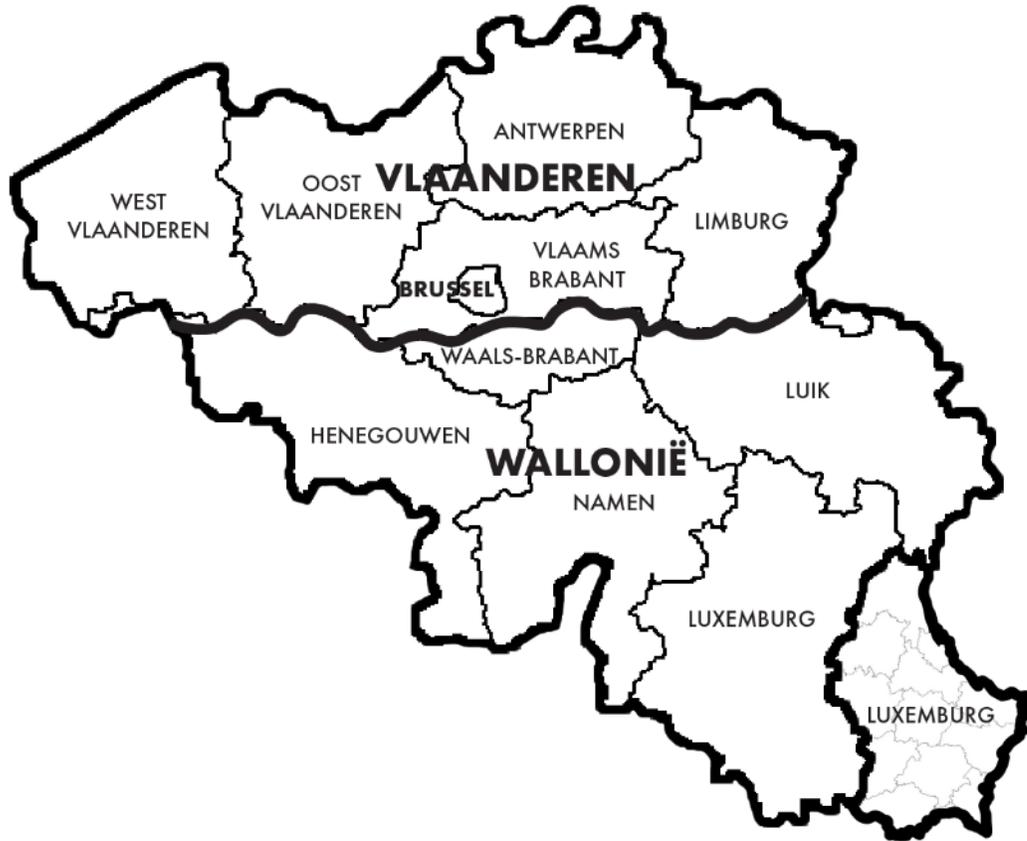
2017 – 50 stores

2024 – Over 130 stores

The BELUX is an important supplementary market to the Netherlands



Country overview BELUX



Area	Population	Store count	Population per store
Vlaams Brabant	1.173.440	28	41.909
Limburg	885.951	17	52.115
Waals-Brabant	409.782	6	68.297
Antwerpen	1.886.609	27	69.874
West-Vlaanderen	1.209.011	17	71.118
Oost-Vlaanderen	1.543.856	17	90.815
Henegouwen	1.351.127	14	96.509
Luxembourg -BE	291.143	2	145.572
Luik	1.110.989	3	370.330
Namen	499.454	1	499.454

Area	Population	Store count	Population per store
Luxembourg	653.103	4	163.103

TOTAL POPULATION BELGIUM: 11.7 MILLION

AVERAGE OF 86,667 PEOPLE PER 1 STORE

TOTAL POPULATION LUXEMBOURG: 653.103

AVERAGE OF 163.257 PEOPLE PER 1 STORE



QSR MARKET OVERVIEW BELGIUM

5500 stores



135 stores



116 stores



110 stores



77 stores



55 stores



42 stores



15 stores



The Belgian QSR market is dominated by 'frites' (fries), mostly independent owned.

Belgium considers itself the home of frites, and the world's best maker, with many Belgians having a weekly ritual of enjoying their favourite frites, usually from a small kiosk store.



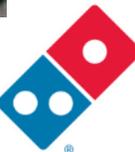
QSR MARKET OVERVIEW BELGIUM

	Market share
Fry shops	25%
McDonald's	10%
Pizza Hut	7%
Quick	6%
Domino's	5%
Burger King	5%



Note: Pizza Hut operate predominantly restaurants, accounting for higher volumes

Source: Q4 2023, by DVJ Research.



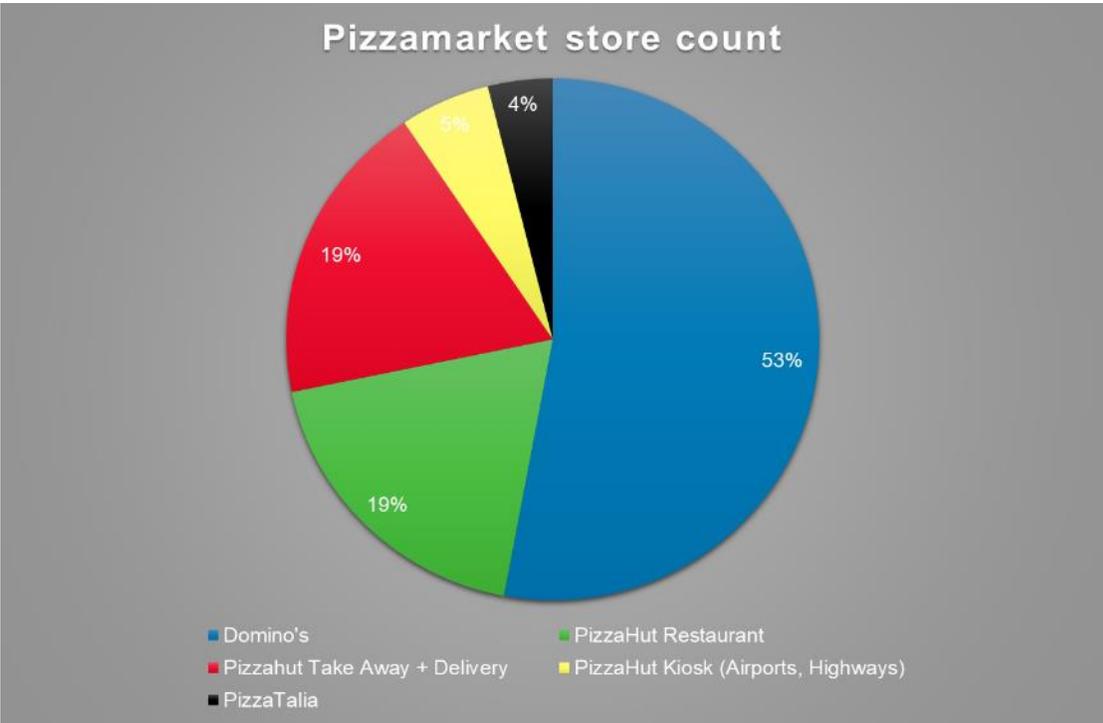
PIZZA MARKET OVERVIEW BELGIUM

135 stores

110 stores
(incl. restaurants)

10 stores

0 stores



Source: Public websites.
NB: Graph represents share of store count, not market share.

A TYPICAL CITY - Brussels

Brussels is the administrative, commercial, and financial heart of Belgium, and the majority of services and institutions of national importance are based in the city. Brussels is also a major European tourist and cultural attraction, functioning simultaneously as a regional metropolis and an international centre.

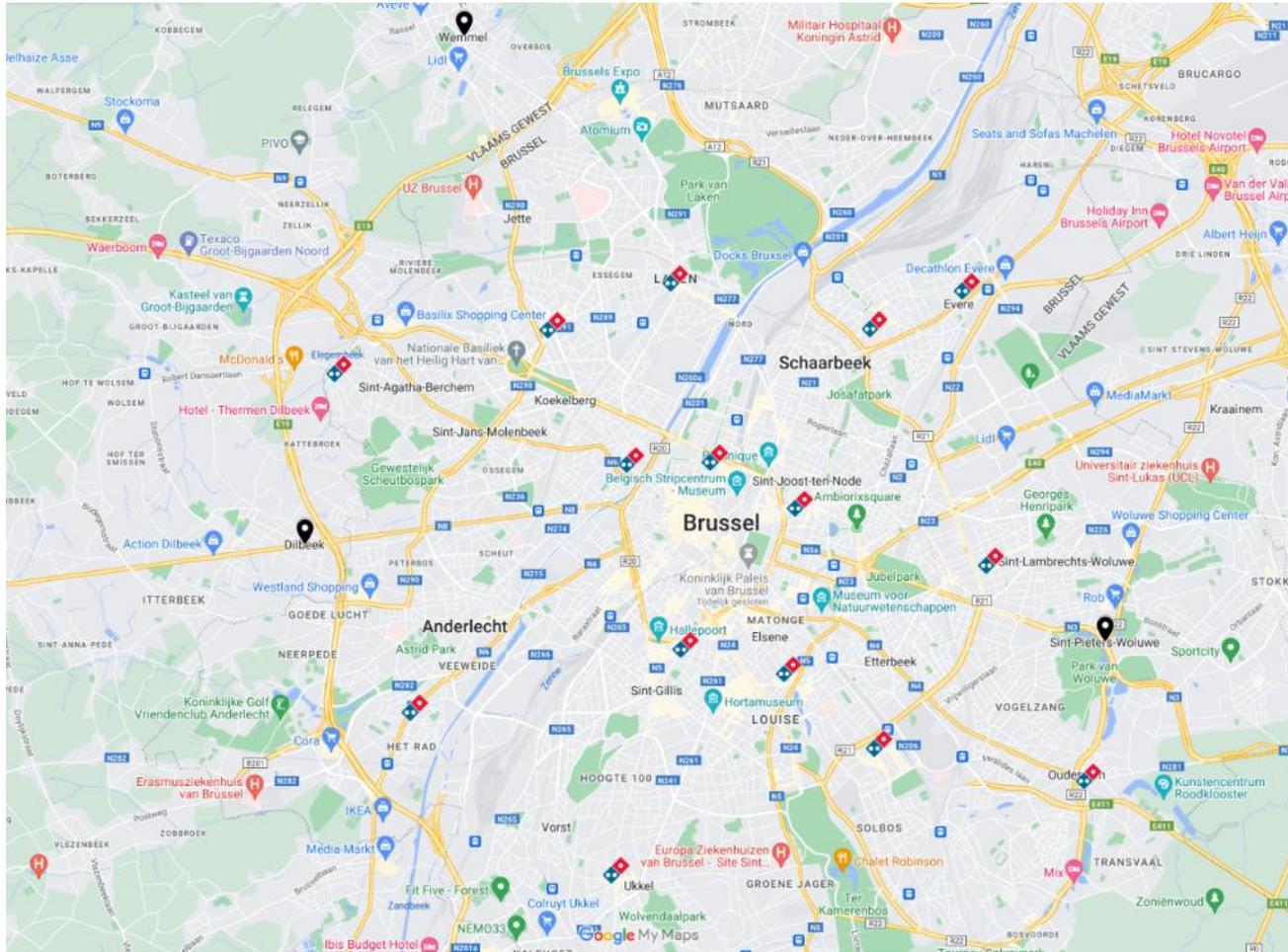
The city lies just a few miles north of the invisible “language boundary” separating Belgium’s Flemish-speaking region of Flanders in the north from the southern, French-speaking Walloon Region. Brussels is thus surrounded by Flemish territory. Although historically it was a predominantly Flemish-speaking city, at present the majority of residents in Brussels speak French

Fun fact: our Domino’s store in Brussels, Jette was the first Domino’s in Belgium in 1993.

Fun fact: The Brussels Capital Region consists of 19 municipalities and 118 districts.



A TYPICAL CITY - Brussels



City	Population / stores
Leuven	30.964 (+3 potential stores)
Gent	57.873 (+4 potential stores)
Luik	65.115 (+4 potential stores)
Antwerpen	65.686 (+9 potential stores)
Brussels	67.935 (+3 potential stores)
Namen	113.286 (+4 potential stores)
Hoei	21.238 / 0 stores

Total store count Brussels: 15 stores + potential for 3 more stores

Note: colour shadings are for visual representation only, and do not represent the potential or unit economics of individual cities or regions. They are also not comparable across markets.



Dominating Delivery

Aggregators are an important **INCREMENTAL** sales platform

Total aggregator share from digital sales: 25%

Aggregators in BE:

1. JustEat/TakeAway

Active for Domino's since: unknown

Order share from digital sales: 20,5%

2. UberEats

Active for Domino's since: 2022

Order share from digital sales: 5%

3. Deliveroo

No partnership (yet)

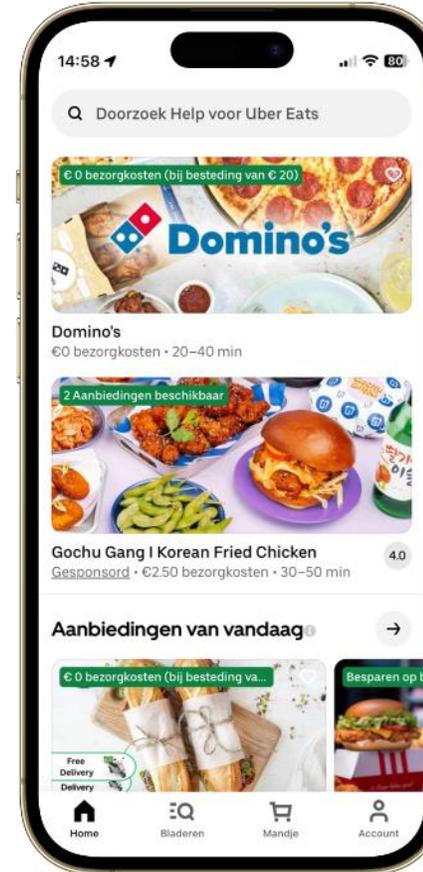
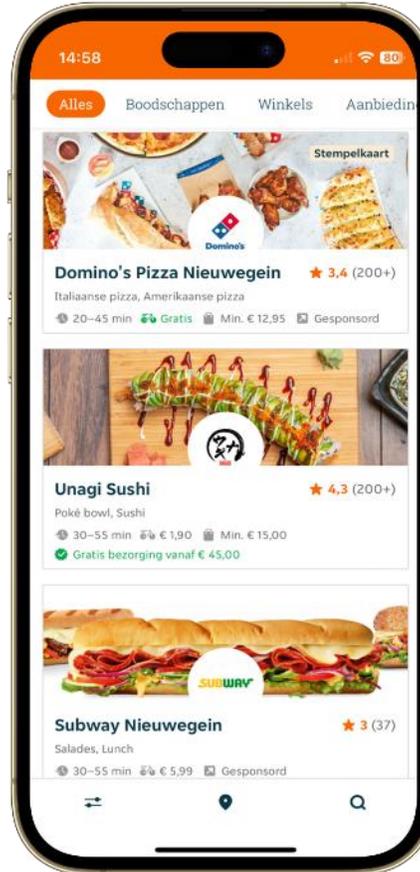
Aggregators in LUX:

1. JustEat/TakeAway

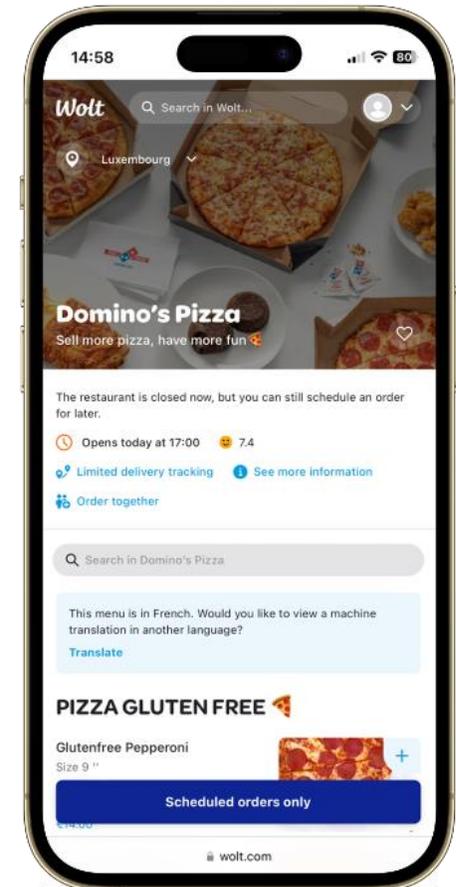
Active for Domino's since: unknown

2. Wolt

Active for Domino's since: April 2024



Uber Eats

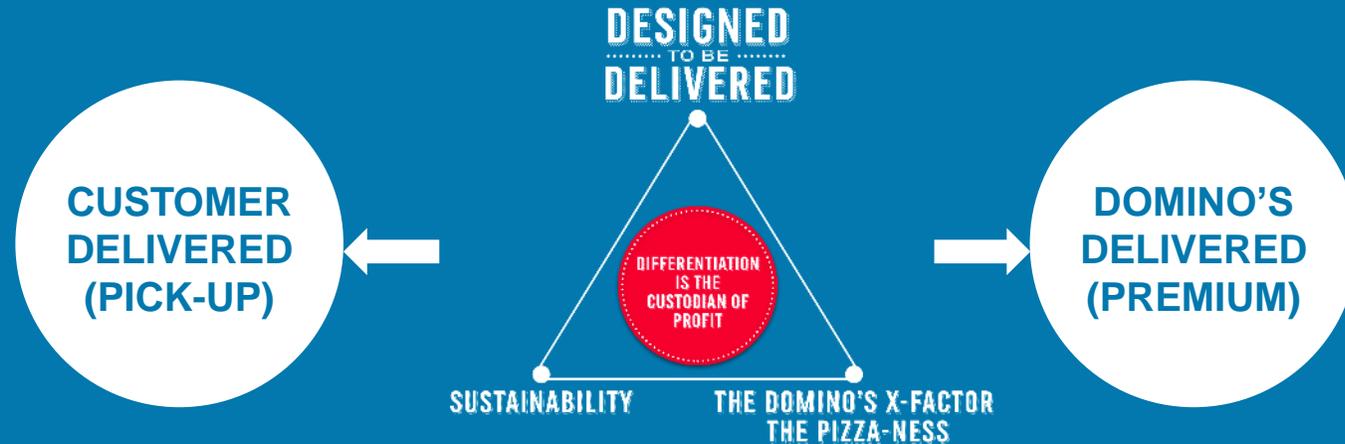


THE DOMINANT SUSTAINABLE DELIVERY QSR IN EVERY MARKET BY 2030

Mission

Inspired Products & Services

Designed for Delivery



That are high quality and delivered quickly for an affordable price

$$\text{Value} = (\text{Product} + \text{Service} + \text{Image}) / \text{Price}$$



Products that break through in a crowded QSR landscape with inspired performance



**GROWING CUSTOMERS IN THE BENELUX
THROUGH A NEW BRAND STRATEGY.**

LAUNCH IN SEPTEMBER.....



INSPIRED NEW PRODUCTS

GROWING CUSTOMERS – TACKLING NEW OCCASIONS AND EXPANDING RELEVANCE



Focus on other moments (lunch) and one-person households



Offering variety and choice, anticipating changes in society



Focus on other moments (lunch) and Eatertainment



Introducing Belgian most popular product (Fries) – to be the QSR one stop shop for everyone



Eatertainment

GROWING CUSTOMERS – INSPIRED PRODUCTS ON MORE OCCASSIONS



Jump on National Holidays – season related limited editions and Eatertainment



New desserts with existing ingredients



Brand new menu items with low food cost



Bringing back unique national favorites to the menu (Bicky in Belgium)



The traditional favourites

GROWING CUSTOMERS – REFRESHING THE CORE



New pizza crust for all of our pizza's



Using the My Domino's Box for special snack boxes (EURO 2024) and dessert boxes



Bring back our Greatest Of All Time Pizza's on our menu



A dessert pizza – need we say more?





**We help our
people grow and
prosper**



We help our people grow and prosper

From driver to Franchise partner/Support office

More than 90% of our Franchise Partners started their Domino's career as a driver or pizza maker

Fun fact: in 2023, Domino's ranked 8th in the Top 50 - Best parttime jobs for young people

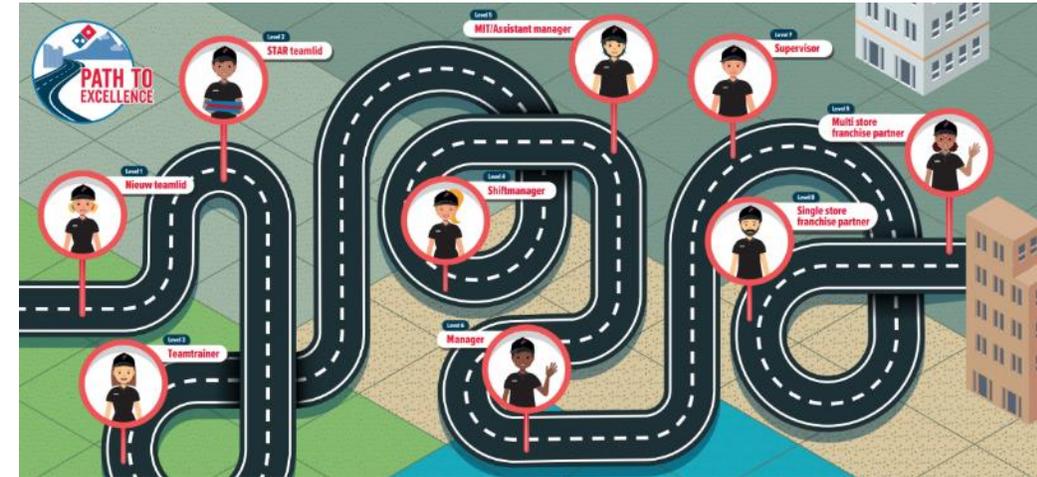
Training opportunities

We offer many training opportunities to help our people grow and prosper. For example our online Path to Excellence program

Events

Alongside our annual Rally's we also host a special Managers' Rally every year. During event we inform and inspire our store managers with workshops on food safety, local store marketing, operations and reputation.

We have also organized several network events in The Netherlands to foster a group for young managers, which has developed several new female franchise partners.



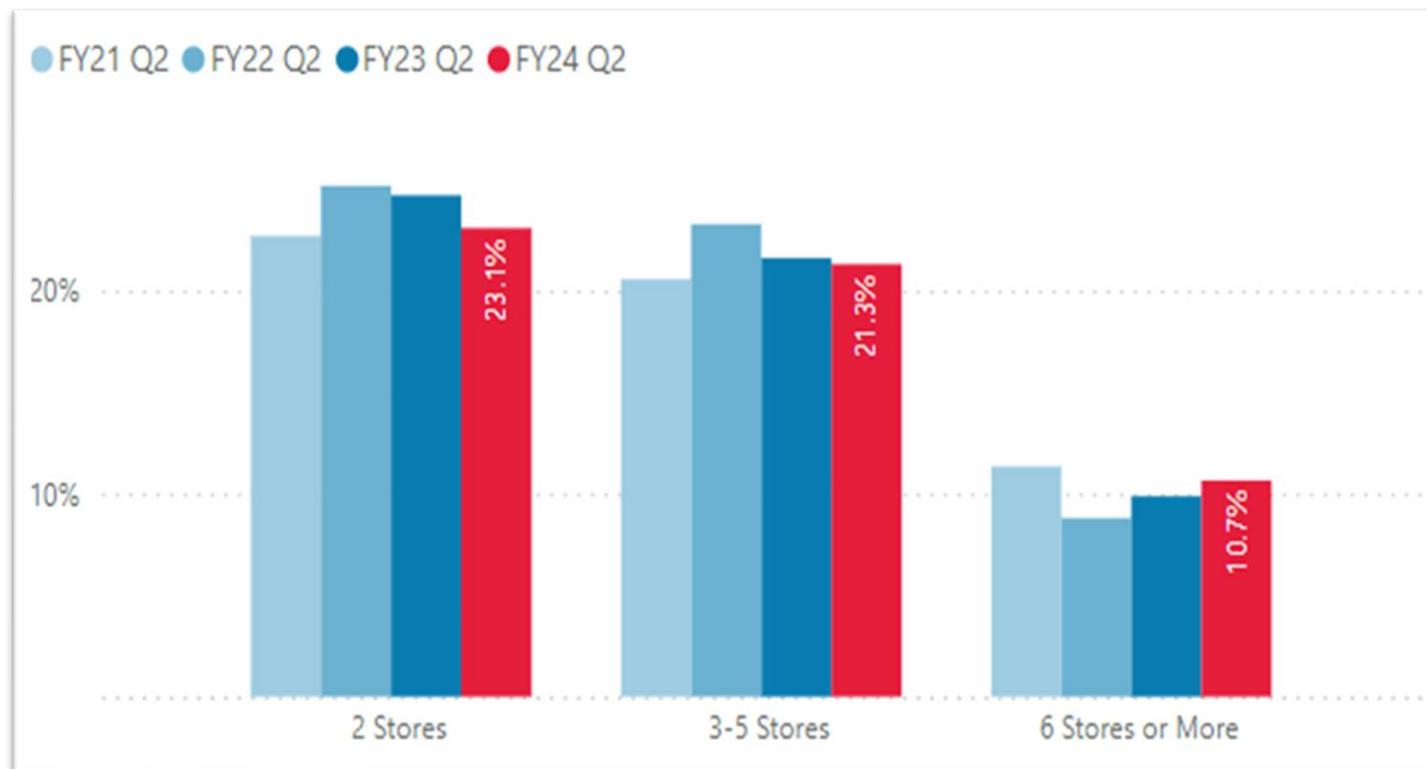
Winner FPMC NL + Europe @ WWR 2024



OUR FRANCHISE PARTNERS HAVE A TRACK RECORD OF SUCCESS

MULTI-UNIT OPERATORS, WHO HAVE GROWN UP IN THE BUSINESS

NUMBER OF STORES PER FRANCHISEE



141 → 169



2.7 → 2.6



RE-ENGAGING FRANCHISE PARTNERS

Domino's NL is focused on lifting unit economics after labour increases in January

Some franchise partners chose to respond by lifting prices above recommended levels, which has reduced customer counts.

We are focused on re-engaging all franchise partners, and growing sustainably stronger unit economics, with higher customer counts. Menu development is at the centre:

- Inspired new products with lower food costs
- Targeting new occasions where Domino's under-indexes, to grow total customer counts and leverage fixed costs
- This has allowed less discounting throughout the week

This approach is working: 86% of Franchise Partners (NL) have re-aligned to our recommended pricing tiers

DOMINO'S BENELUX HAS A TRACK RECORD OF SUCCESS, AND EXPECTS TO DELIVER ON THIS OPPORTUNITY IN THE NEAR-TERM



Franchise partner roadshows have been well attended, with leaders communicating Domino's sustainable growth strategy





Domino's for Good – The Netherlands

Our people:

At Domino's we help our people Grow and Prosper. We are very proud of initiatives including the Domino's Next Talent Network (DNTN) that motivate women to become Franchise Partners.

Domino's Pizza Inc awarded a Golden Franny, the top award, for the outstanding performance of our partners.

Safety campaigns

Bodycams, Blinky project – to reduce team member injuries

Our communities:

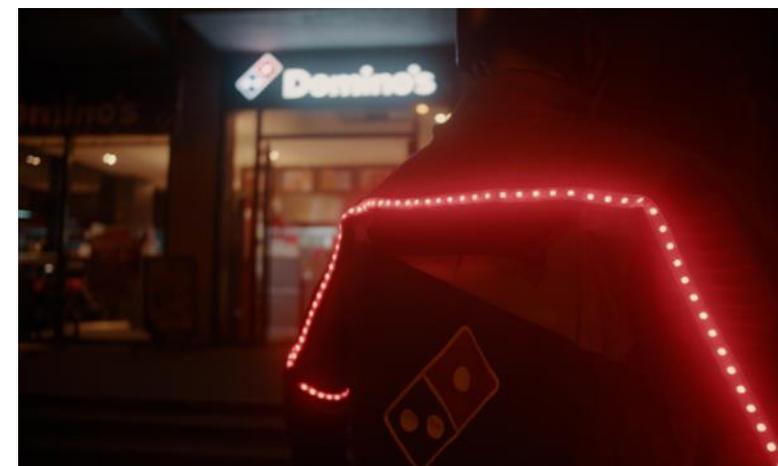
Partnership with JINC

Contributing to a society where someone's background doesn't determine their future: internships in stores, job training at schools, sharing knowledge and donations to the JINC Foundation

Our environment:

Plastic reduction in our packaging

95% of our packaging is free of plastic. Where avoiding plastic is not currently possible (e.g. sauce cups) we make a contribution to the Plastic Soup Foundation.



Domino's for Good - BELUX

Our People

Sharing the success stories of our Franchise Partners and team members, providing opportunities to join Domino's and prosper

Our Communities

Partnership with JINC

Contribute to a society where someone's background doesn't determine their future: internships in stores, job training at schools, sharing knowledge and donations to the JINC Foundation

'Cheesy Donations' – we donated €2 for every Cheesybread sold during 'The Warmste Week' for Bednet, a charity that strives for a future where everyone can grow up without worries.



🕒 1 december 2023 • CORPORATE NIEUWS

Het ondernemersverhaal van Huseyin Mavili: "Het teamgevoel is erg belangrijk. Je moet elkaar altijd supporten."

Van pizzamaker tot eigenaar van 8 Domino's vestigingen: het succesverhaal van Hussein Mamlouk

In 2008 startte Hussein Mamlouk als pizzamaker bij Domino's. Vijftien jaar later is hij naast een toegewijde partner en vader van twee jonge kinderen ook eigenaar van acht succesvolle Domino's vestigingen. Deze groei ging gepaard met hard werken en een sterke focus op uitstekende klantentoevloed en het bieden van goede service. Hij deelt meer over zijn ontsteking binnen Domino's en hoe hij dit succes verder voortzet.

Huseyin werd al snel enthousiast over Domino's en haar formule. In slechts een jaar tijd groeide hij door van pizzamaker naar assistent-manager van de winkel waar hij werkte. In 2010 kon hij als winkelmanager in een Domino's vestiging in Antwerpen aan de slag en in 2013, vijf jaar na zijn start bij Domino's, opende hij zijn eerste eigen vestiging in Gent. Het meest trots is Hussein op het succes dat hij van deze winkel heeft gemaakt: "Dit eerste winkel was geen gewone winkel om over te nemen. Dit waren grote uitdagingen op me te wachten. Ik ben met veel enthousiasme en op gedisciplineerde wijze te werk gegaan om van deze winkel een groot succes te maken." En dat is gelukt: op basis van het succes van zijn eerste winkel, heeft Hussein steeds gebouwd aan zijn rol als franchisee bij Domino's.



Domino's for Good - BENELUX

Our Environment

Under Project Golf (applying learnings from France), new trays have been developed to fit 80% more dough balls per tray, reducing the number of deliveries required to 500 Domino's stores in the region.

In addition to reducing the number of deliveries, approximately 10% of these trips will now be conducted via 100% electric trucks.

Our Food:

Our dough is completely vegan and our menu is almost completely free of artificial additives. We offer a menu full of choice and variety, that allows everyone to come to us for a surprising eatertainment experience.



LONG TERM OUTLOOK - BENELUX

DOMINO'S BENELUX IS WORKING THROUGH LARGE LABOUR INCREASES – AND NOT FOR THE FIRST TIME IN OUR HISTORY

DOMINO'S HAS THE BRAND, MENU OFFERING, TECHNOLOGY AND OPERATIONS TO BUILD SALES AND ORDER COUNTS

OUR EXPERIENCED FRANCHISEES HAVE DEMONSTRATED THEY WILL ENGAGE WITH THIS APPROACH IN THE NEAR TERM

GROWING ORDER COUNTS ARE AN INTEGRAL PART OF OUR STRATEGY TO LIFT UNIT ECONOMICS, AND INCENTIVISE FRANCHISE PARTNERS TO EXPAND THEIR BUSINESSES

WE HAVE THE TRACK RECORD TO DEMONSTRATE WE WILL DELIVER ON THE OPPORTUNITY FOR THE BENELUX



FUTURE STORE OUTLOOK

900 (+75%)



DMP EUROPE STRATEGY DAYS - GERMANY

27th May, 2024



EXECUTIVE SUMMARY

- **WELCOME TO GERMANY, ONE OF THE LARGEST PIZZA MARKETS IN THE WORLD**
- **HISTORY: PRIOR TO DOMINO'S PIZZA ENTERPRISES LTD, GERMANY HAD INSUFFICIENT RESOURCES AND SCALE TO GROW**
- **NOW: DOMINO'S IS WINNING, ESPECIALLY THROUGH DELIVERY**
- **WE HAVE THE RIGHT STRATEGY AND THE DEMONSTRATED ABILITY TO WIN SHARE AND GROW**
- **POTENTIAL: WE ARE SIGNIFICANTLY UNDER PENETRATED AND HAVE FORTRESSING AND WHITESPACE OPPORTUNITIES**
- **WE HAVE THE AMBITION TO BE THE BIGGEST DPE MARKET**



GERMANY

1979 – Domino's first established

2015 – Acquired by Domino's Pizza Enterprises Ltd (20 stores)

Acquired Joey's Pizza (212 stores)

2018 – Acquired Hallo Pizza (170 stores)

2023 – 100% ownership



CEO, Domino's Pizza Germany: Alexander Tauer



- Joined Domino's Pizza Germany in 2012
- Supported the development of franchise partners as Head of Franchise Operations until 2015
- Left the Domino's business to take on management and consulting roles in the food industry
- Returned to Domino's in 2020
- Under Alex's leadership as Development Director, Domino's broke its store growth record twice, with +86 stores in two years
- Appointed Domino's COO, and subsequently CEO since 2023



DOMINO'S PIZZA GERMANY MANAGEMENT TEAM



**ALEXANDER
TAUER**
CEO GERMANY

Alexander Tauer has been the CEO of Domino's Pizza Germany since December 2023. He joined Domino's in 2012 as an external consultant – before he subsequently led the day-to-day operations as Chief Operating Officer and then CEO.



HANNAH SCHMIDT
CBO GERMANY

Hannah joined Domino's Pizza in 2016. Following various roles within the German Development department, she headed up Franchise Development before participating in the High Leadership Mentality program. After stages with DP Netherlands and DP France, she returned to the German market as Chief Business Officer.



**NATHAN
WINSTANLEY**
CMO GERMANY

Nathan as Germany's CMO, oversees brand building marketing for 400+ stores. He's driven by short-term retail marketing and long-term brand-building, stabilizing traffic growth despite challenges. Utilizing Domino's platforms and partnerships, he ensures Domino's Germany maintains technology and digital ordering leadership.



TOM ANDERSON
CFO GERMANY

Tom joined Dominos in 2016 as ANZ Tax Manager, later becoming Group Tax Manager. He then served as interim CFO in Germany from 2021 to 2022 and interim French CFO from 2022 to 2023 before resuming his role as German CFO in late 2023. Leveraging his extensive experience with multinationals, PwC, and Dominos, Tom aims to offer financial insights and drive value across the organization.



PHILIPP SERVO
DIRECTOR CORPORATE
STORES GERMANY

Philipp Servo's journey with Domino's began unexpectedly when Domino's acquired the Joey's pizza chain where he was a successful franchisee. Despite the change, Philipp swiftly climbed the ranks from delivery driver to franchisee and multi-unit owner, doubling his business in just a few years and now, as Director Corporate Stores, manages 21 stores.



KATHRIN REZAC
CCO EUROPE, HEAD OF
COMMUNICATIONS GERMANY

As Chief Communications & Corporate Affairs Officer for Europe Kathrin is responsible for developing and driving internal and external communications strategies aligned with the Company's short and long-term business goals. She joined Domino's in 2021 and has more than 10 years' experience in communications, public relations, and corporate affairs.



QSR MARKET OVERVIEW GERMANY

WE HAVE GROWN TO 4TH LARGEST BRANDED QSR IN A HIGHLY FRAGMENTED MARKET

1.386 units



760 units



670 units



409 units



295 units



**WITH LESS THAN 5% OF THE TOP 10 QSR MARKET
DOMINO'S GERMANY HAS ROOM TO GROW**



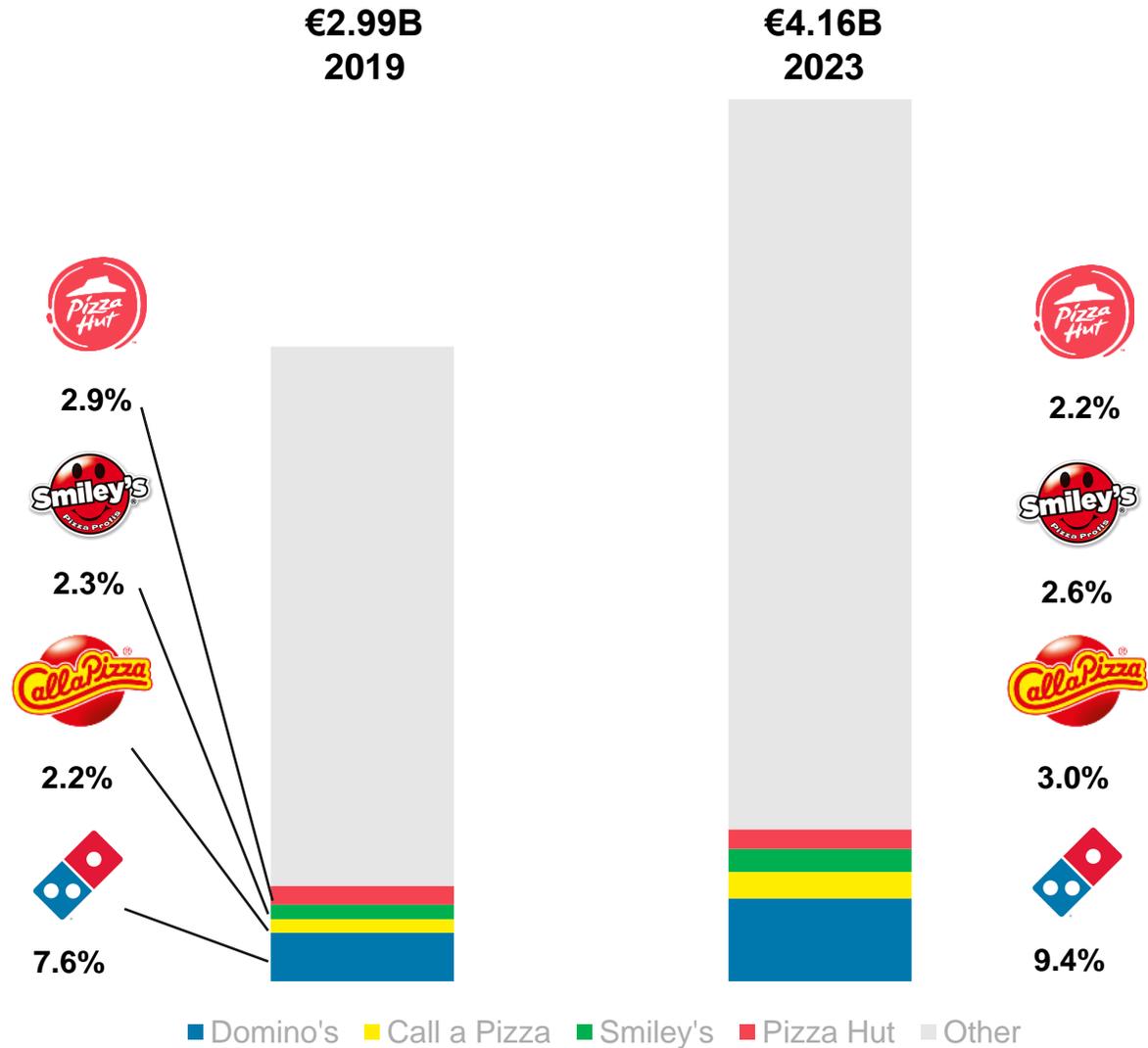
QSR PIZZA MARKET OVERVIEW IN GERMANY

THE PIZZA MARKET IS GROWING, AND WE ARE WINNING SHARE


+39%
MARKET GROWTH
over past 5 years


+180 BPS
SHARE OF MARKET
over past 5 years

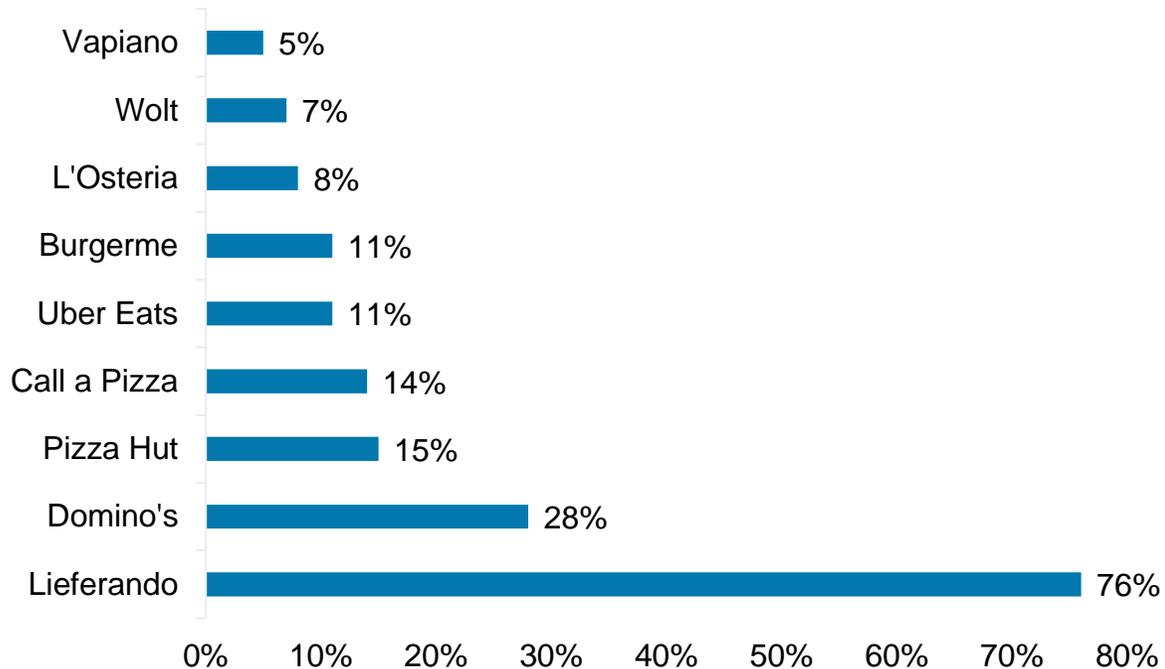
QSR Pizza Market



DOMINO'S GERMANY IS KNOWN FOR OUR DELIVERY EXPERTISE

GERMAN CONSUMERS RECOGNISE DOMINO'S AS THEIR FAVOURITE DELIVERY COMPANY MORE THAN ANY OTHER QSR

Most popular online delivery services – measured by customer recall (2023)



DOMINATING DELIVERY

- DOMINO'S GERMANY IS UNIQUE WITH SALES HIGHLY SKEWED TO DELIVERY
- GERMANY HAS THE HIGHEST DELIVERY WEEKLY ORDER COUNT IN ALL DPE MARKETS
- THIS HAS PROVEN TO BE A STRENGTH, AND AN OPPORTUNITY TO GROW CARRY-OUT

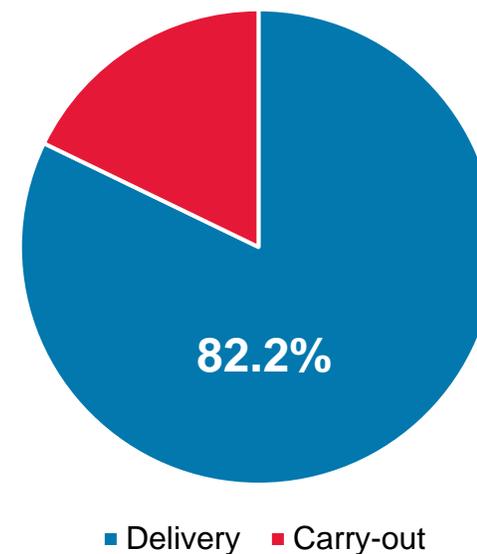
**DELIVERY SALES
GROWTH (€)**
(pre-COVID to post-COVID)

+89%
(FY19-FY23)

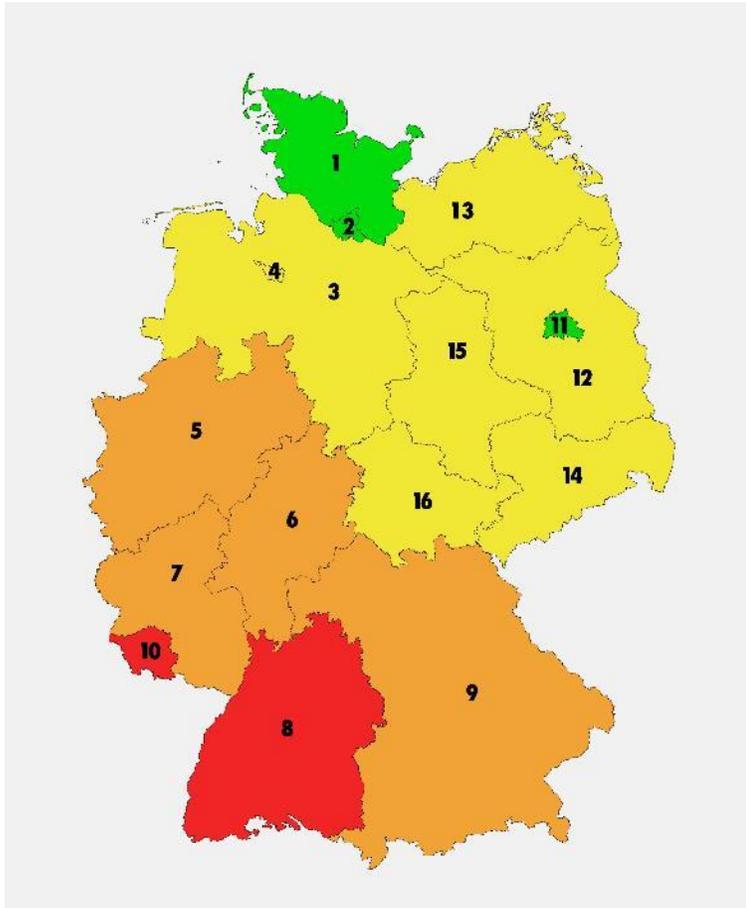
**CARRY-OUT
SHARE**
(pre-COVID to post-COVID)

+208bps
(FY19-FY24)

SALES BY SERVICE METHOD FY24



Country overview Germany

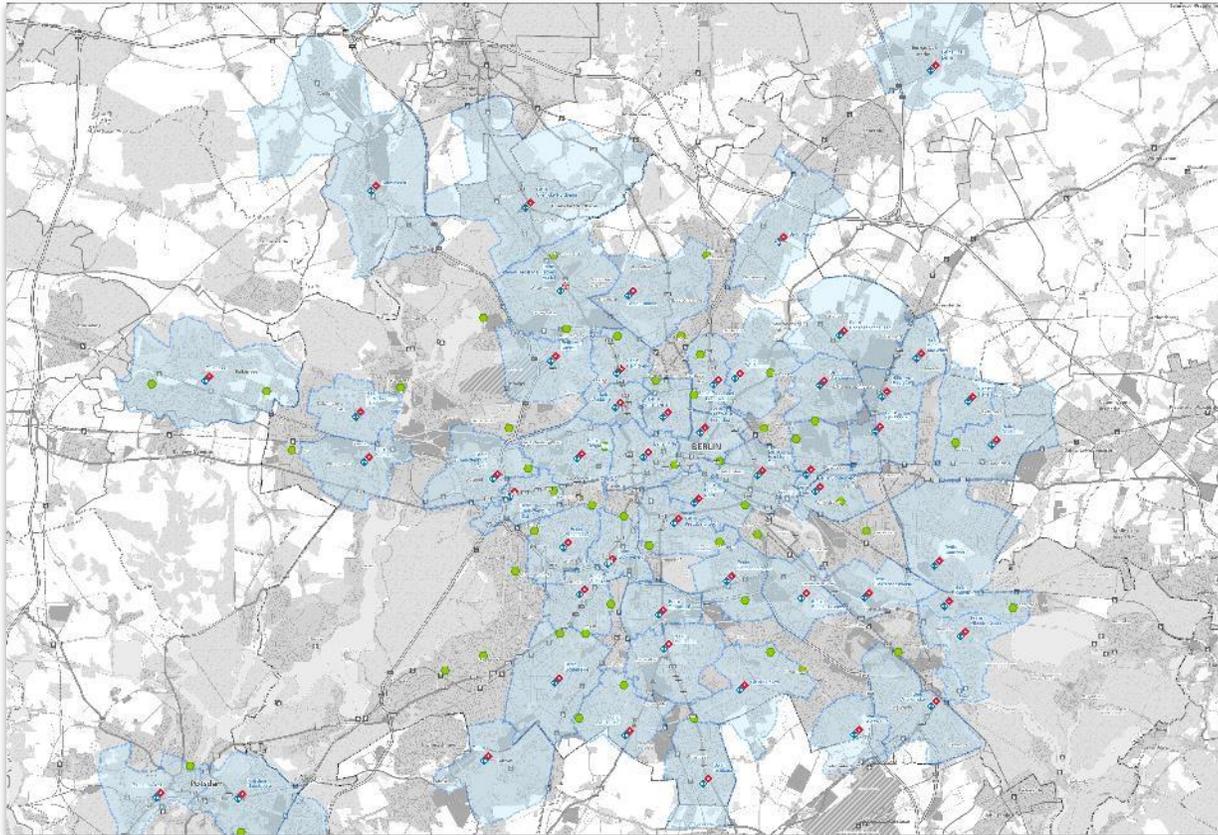


Key	Region	Population	Store Count	Population / Store
	New South Wales (Australia)	8.166.000	201	40.626
2	Hamburg	1.847.253	39	47.365
	Current Netherlands store count	17.900.000	373	48.117
11	Berlin	3.669.491	45	83.398
	Germany long-term outlook	83.800.000	1.000	83.800
1	Schleswig-Holstein	2.903.773	30	96.792
12	Brandenburg	2.521.893	23	109.648
14	Sachsen	4.071.971	37	110.053
3	Niedersachsen	7.993.608	49	163.135
	Current German store count	83,800,000	409	205.392
5	Nordrhein-Westfalen	17.947.221	64	280.425
6	Hessen	6.288.080	17	369.887
9	Bayern	13.124.737	27	486.101
8	Baden-Württemberg	11.100.394	17	652.964
10	Saarland	986.887	1	986.887

- **83,8 MILLION POPULATION**
- **205.000 PEOPLE PER STORE**



A TYPICAL CITY - Berlin



City	Population / Store
Hamburg	47.365
Berlin	83.398
Dresden	50.616
Germany long-term outlook	83.000
Köln	217.573
München	148.423
Düsseldorf	124.375
Stuttgart	635.911
Dortmund	588.250
Duisburg	498.686 / 0 Stores
Mainz	218.578 / 0 Stores

Berlin is Germany's largest city and the country's capital, with a population of 3.669.491. Domino's currently has 45 stores.

Fact: Prior to 2018 there were only 17 stores, 14 were added with the Hallo Pizza Conversion and 13 grew organically in the past 3 years.

Still **only 80% of the city can access Domino's delivery.**

And more store fortressing will occur to reduce delivery costs and improve customers' experience through lower delivery times



WE HAVE A FRANCHISE PARTNER BASE BUILT FROM ACQUISITION (JOEY'S AND HALLO) AND WITHIN

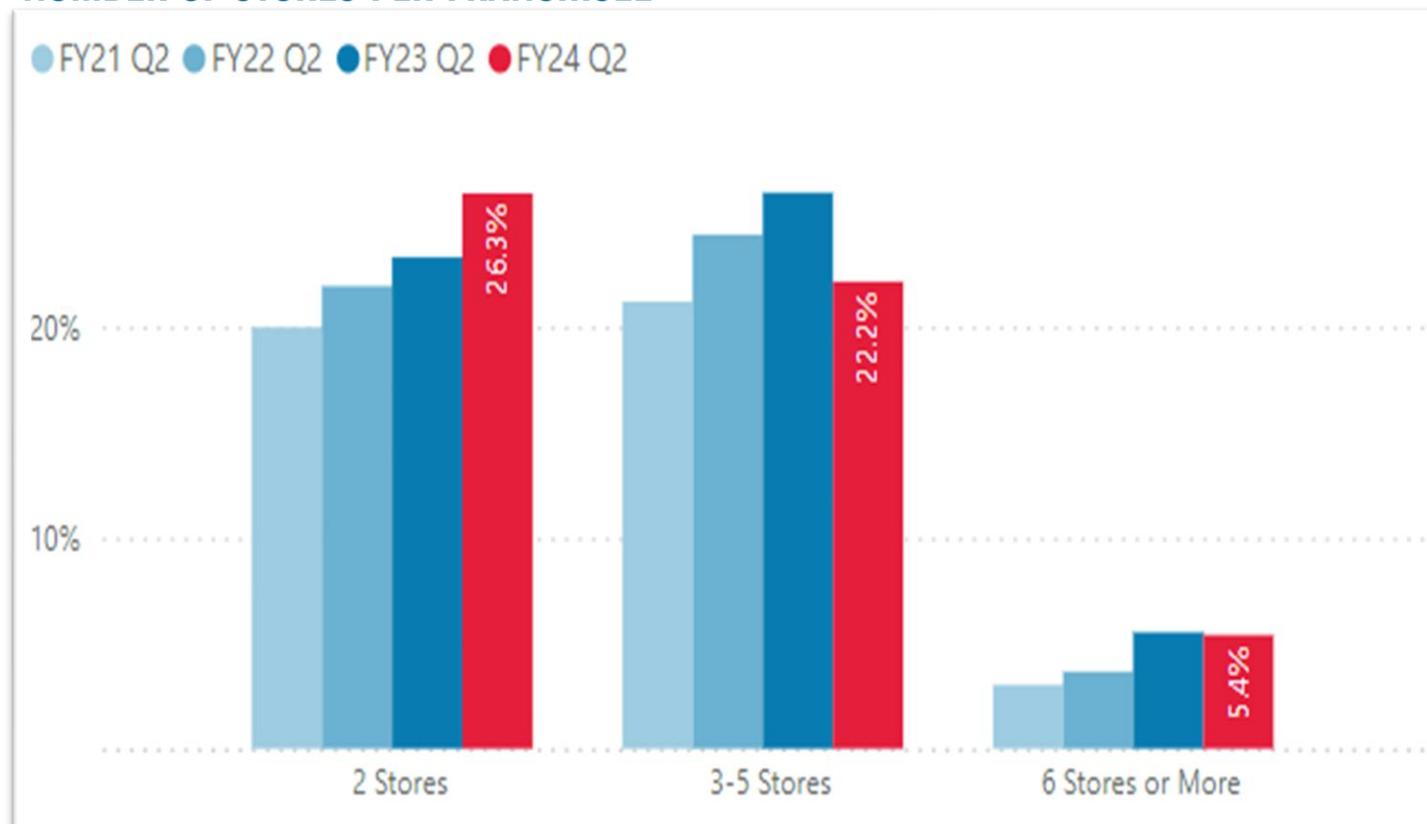


165 → 167



2.0 → 2.3

NUMBER OF STORES PER FRANCHISEE



OUR FOCUS IS ON GROWTH

Three key areas we are focused on



**STRONG GROWTH IN
AGGREGATORS**



**IMPROVED USE OF
MEDIA \$\$\$**



**INSPIRED PRODUCT
LAUNCHES**

and how these all build the foundations for our future growth.



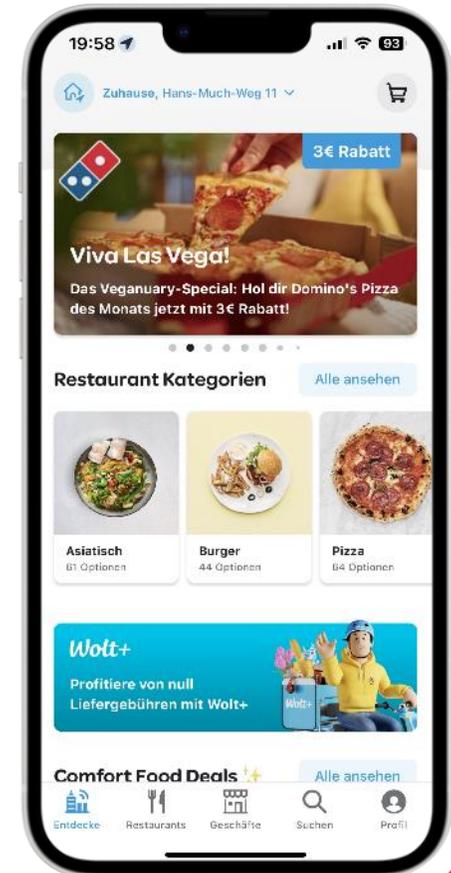
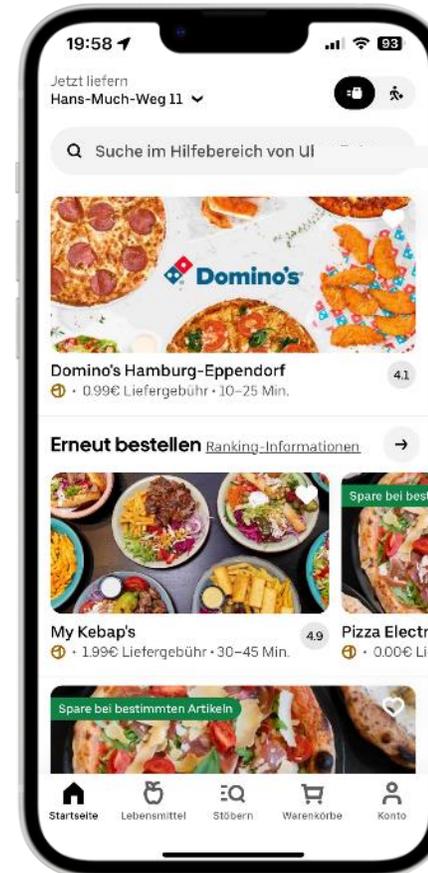
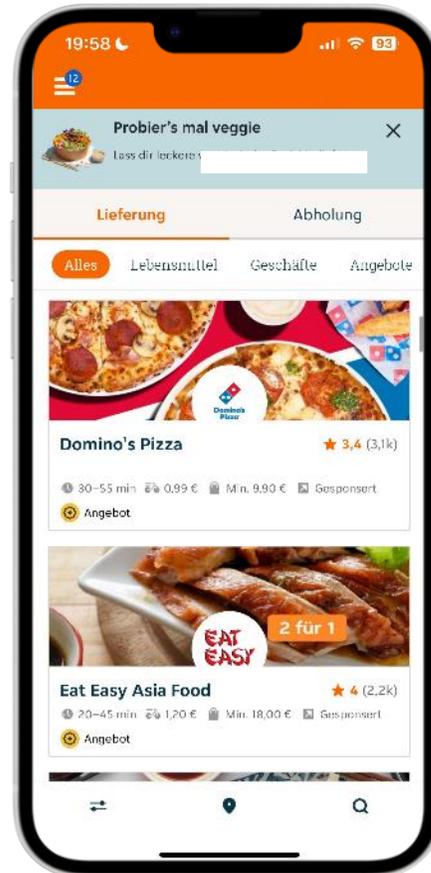
STRONG GROWTH IN AGGREGATORS - PARTNERSHIPS

Aggregators are an important **INCREMENTAL** sales platform

36% of Digital Sales

Domino's has recently added two new platforms:

- **Lieferando, 2017**
- **Wolt, 2022**
- **Uber Eats, 2022**



DOMINO'S IS WINNING INSIDE AGGREGATORS

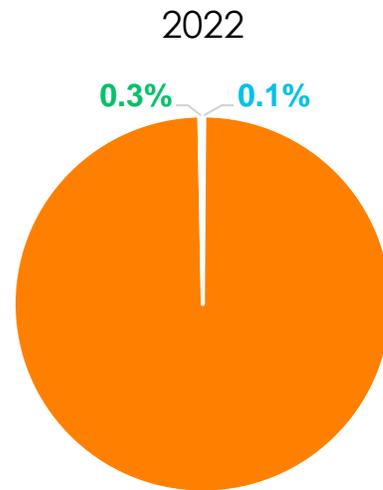
+13%

SALES YEAR ON YEAR

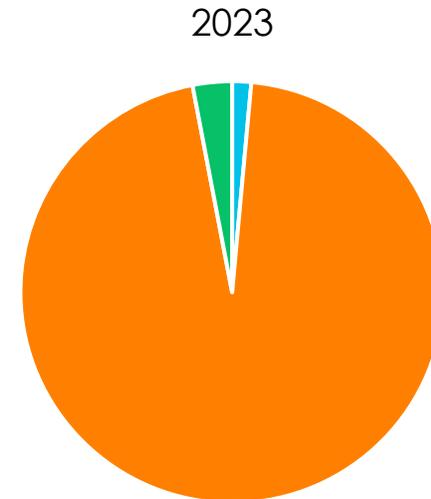
GROWING SALES THROUGH:

- **MORE CUSTOMERS**
- **LARGER BASKETS**
- **ON ALL PARTNERS**

We are in the early days of growing share in two new aggregators



■ Wolt ■ Lieferando ■ Uber Eats



■ Wolt ■ Lieferando ■ Uber Eats



IMPROVED USE OF MEDIA SPEND



OWNED CHANNELS

We have an extensive database of customers opted in to receive targeted campaigns

Our loyalty club is an important base and we intend to do more to build an ongoing, rewarding relationship with our regular customers

TV-RADIO

We have sufficient scale to advertise on TV/radio – but national broadcasts means not everyone can access us

We have moved spend from TV/Radio to other channels

DIGITAL MEDIA

Our modelling shows digital channels delivers a high ROI for our paid media.

Platforms including Instagram, YouTube and Tiktok are showcases for eatertainment





BEEF.

THE DOMINANT SUSTAINABLE DELIVERY QSR IN EVERY MARKET BY 2030

Mission

Inspired Products & Services

Designed for Delivery



That are high quality and delivered quickly for an affordable price

$$\text{Value} = (\text{Product} + \text{Service} + \text{Image}) / \text{Price}$$

PRODUCT QUALITY: 4.5 DELIVERY: 18 MINS. NET PROMOTER SCORE

DOMINO'S BOX CHICKEN DÖNER PIZZA PRIME BURGER PIZZA

NEW PIZZA BRÖTCHEN

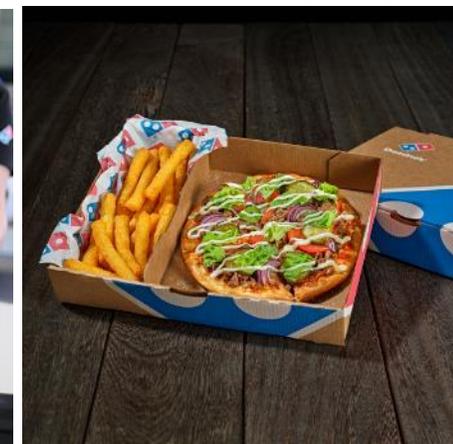
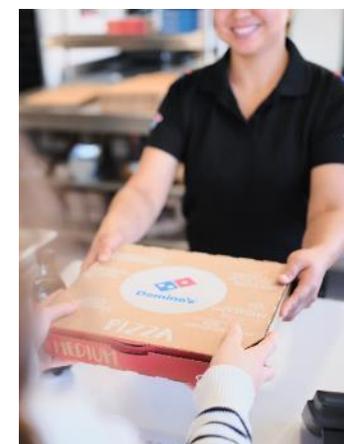
CHEESECAKE PIZZA

Products that break through in a crowded QSR landscape with inspired performance



GROWING CUSTOMERS

INSPIRED PRODUCTS ON MORE OCCASIONS



EATERTAINMENT

Chicken Döner Pizza
(June 2023)
&
Prime Burger Pizza
(April 2024)

REFRESHING THE CORE

Regular updates to
popular products
VALUE IN – COST OUT
New dessert range

TACKLING NEW OCCASIONS

Grab & Go carry-out
&
My Domino's Box





We believe in a better slice for everyone

We believe in our people



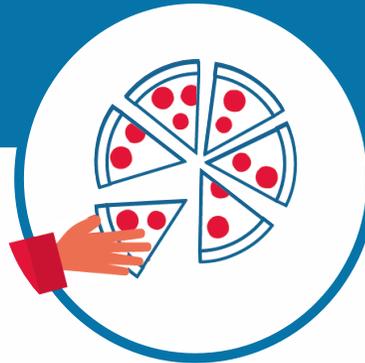
Our aim:
Our peoples' experience at Domino's makes them better

We are serious about our food



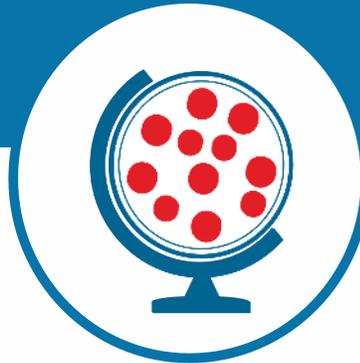
What people put into their bodies matters.
Rich flavours do not have to be at the expense of health or quality

We cherish our customers



We cater diverse options to individual tastes while upholding our unwavering commitment to quality

We are mindful of the environment



Companies are increasingly expected to play a leading role in tackling climate change. We are committed to science-based targets

We take care of our communities



The success of our business depends largely on the role we play in the communities in which we operate.



We believe in a better slice for everyone

2024



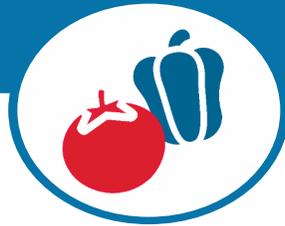
DiversiTeam Expansion



Supply Chain



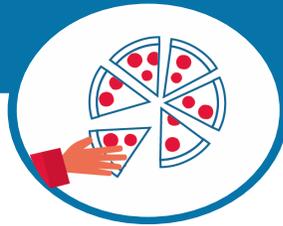
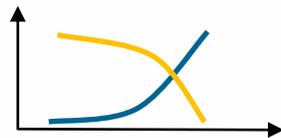
Workplace Safety



Vegan Choices

VEGANUARY 

Vegan / Veggie Tracker



Food Waste



Too Good To Go

Domino's Dairy Initiative



Energy Monitoring



OFF: Zero Fossil Fuels



Waste & Packaging



Vytal



Charity



HELPING PARTNERS GET THE INFORMATION THEY NEED TO SUCCEED

Partners Foundation



Feed the Need



LONG TERM OUTLOOK - Germany

DOMINO'S GERMANY HAS OVERCOME RECORD INFLATION BY APPLYING PROVEN STRATEGIES TO BUILD SALES AND ORDER COUNTS

OUR FRANCHISE PARTNERS ARE WINNING WITH THIS APPROACH – LIFTING UNIT ECONOMICS AND REDUCING STORE PAYBACK

WE INTEND TO RETURN TO GROWTH IN THE NEAR-TERM, AND DELIVER ON OUR LONG-TERM OPPORTUNITY



DMP EUROPE STRATEGY DAYS - FRANCE

28th May, 2024



Executive Summary

- **FRANCE IS THE MARKET OF GOURMET FOOD, BUT ALSO ONE OF THE LARGEST QSR MARKETS**
- **THIS 'FRENCH PARADOX' IS A HUGE OPPORTUNITY FOR DOMINO'S**

- **WE HAVE NOT ALWAYS HAD THE RIGHT APPROACH TO SECURE ENGAGEMENT AND WIDESPREAD ADOPTION BY FRANCHISE PARTNERS: AND WE ARE APPLYING A NEW APPROACH**

- **THE NEAR-TERM SITUATION IS STILL CHALLENGING POST-INFLATION AS OUR MODEL IS IN REBUILD:**
 - **IMPROVEMENT ON AUDITS AND CUSTOMER CARE**
 - **ONE SYSTEM: ALIGNMENT ACROSS THE MARKET**
 - **TAKING OUR SHARE IN THE AGGREGATOR SPACE**
 - **VALUE EQUATION: PROVIDING CUSTOMERS OPTIONS THAT ARE IN LINE WITH THEIR EXPECTATIONS**

- **OUR FOCUS IS CLEAR: OUR EXECUTION WILL LEAD TO FRANCE BEING RECOGNISED AS A SUCCESSFUL PILLAR OF DPE**



FRANCE

1989 – Domino's first established

2006 – Acquired by Domino's Pizza Enterprises Ltd (90 stores vs Pizza Hut 120 stores)

2010 – 180 stores

2019 – 400 stores



TOTAL STORES

482



CEO, Domino's Pizza France: Joël Tissier



Joël Tissier was appointed Domino's Pizza France CEO in January 2023.

Joël has been working for Domino's Pizza France for almost nine years.

He started his journey in 2009 and stayed almost four years in the financial department where he successfully learned and supported the company's growth. In 2019, he returned as Business Development Director, focusing on increasing the number of stores during and after COVID19.

In 2021 Joel was appointed COO because of his extensive knowledge of the food industry, Domino's experience and empathy with franchise partners.



DOMINO'S PIZZA FRANCE LEADERSHIP TEAM



GARY LEPINOIS
COO FRANCE

Gary Lepinois is the Chief Operating Officer for Domino's in France. He's been working for Domino's for 8 years.

He started in 2016 in France as business consultant before becoming head of Corporate stores. Gary worked as COO for Domino's in Switzerland for 2 years and returned to France as COO in January 2023.

He supports the daily operations for the market and corporate stores.



CÉLINE FOURY
CLO FRANCE

Céline is the Head of Legal for France & Head of EU Privacy. She's been working for Domino's Pizza for 12 years.

With the support of her team, she oversees legal affairs, advises on compliance, risks, contracts and litigations for the French market.

Céline also manages privacy compliance for Europe.



DJAMEL TAREK
CIO FRANCE

Djamel is the Head of IT for France.

He's been working for Domino's Pizza for 5 years and joined the leadership team in September 2023.

His role is to ensure safety in the organization, monitor and manage the company's IT systems for France, while complying with the objectives set by its management.



AMBRE ATTAL
CFO FRANCE

Ambre is the Finance Director for France. She has been working for Domino's for 2 years and joined the Leadership Team in October 2023.

She is in charge of tracking the financial performance of the business for both the franchisor (DPF) and franchise partners, as well as building budget and forecast and running financial projects.

Ambre also ensures that processes and internal control are in line with Group policies.



JEAN-FRANÇOIS RINALDI
DEV DIRECTOR FRANCE

Jean-François oversees the expansion and construction department for France.

He has been working in the real estate field for over 20 years and he joined Domino's in 2023.

With the support of his team, he oversees new store openings and works for both new store construction and renovation. He also contributes to the brand's evolution in France by modernising stores.



CAPUCINE GAGNEZ
CMO FRANCE

Capucine is the Head of Marketing for France. She joined Domino's in May 2024, with extensive experience in Consumer goods, e-commerce, retail and more recently QSR, as Marketing Director for Pitaya Thai Street Food.

With the support of her team, Capucine oversees brand building, the digital strategy and manages the marketing budget for 482 stores.



ALBAN AUFFRAY
HR DIRECTOR FRANCE

Alban is the Head of People & Culture for France. He recently joined Domino's to oversee the people agenda with a business growth-oriented mindset.

Prior to Domino's, Alban worked for 18 years for Mars Confectionery. In 2019 he created his own HR Consultancy company delivering HR services in Paris, Berlin and Lisbon.

He's passionate about Global brands and a fan of Domino's since his student years.



QSR MARKET OVERVIEW IN FRANCE

1.485 stores



500 stores



482 stores



400 stores



363 stores



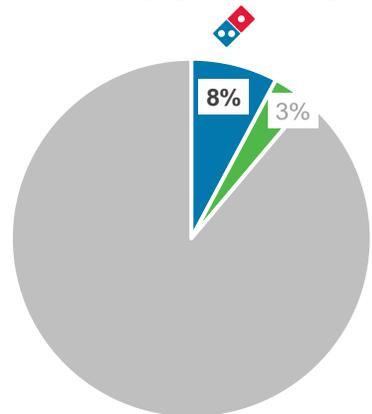
2024 FRENCH QSR COMPETITIVE LANDSCAPE (POINTS OF SALE)



Image source: https://www.linkedin.com/posts/fcharpy_qsr-foodservice-frenchmarket-activity-7049764353004195840-9QfL/

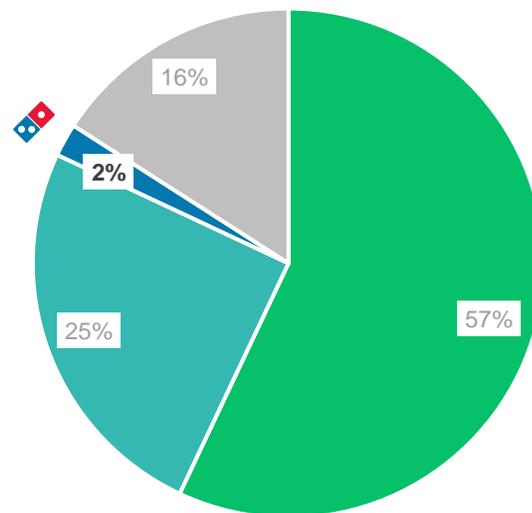
THE SIZE OF THE PRIZE

Pizzas - 4B€



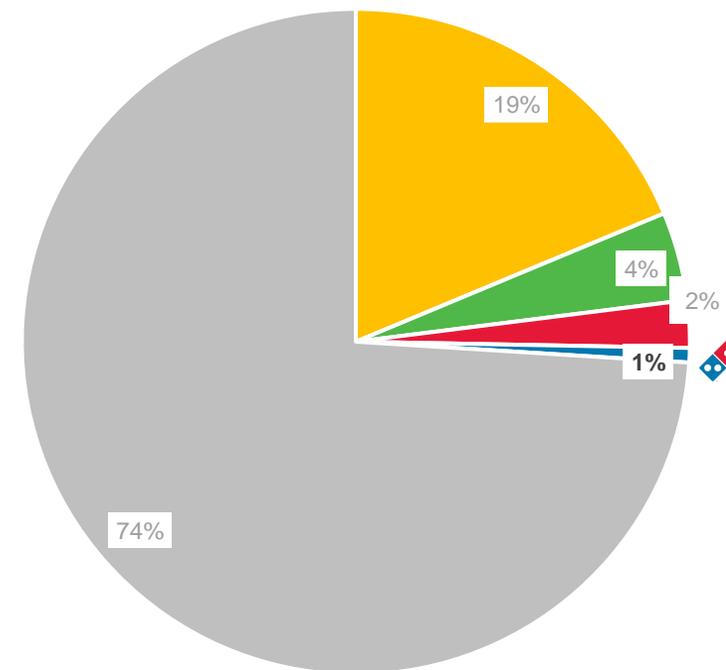
■ Domino's ■ Pizza Hut ■ Other

Delivery - 7B€



■ Uber Eats ■ Deliveroo ■ Domino's ■ Other

QSR - 44B€



■ McDonald's ■ Burger King ■ KFC ■ Domino's ■ Other

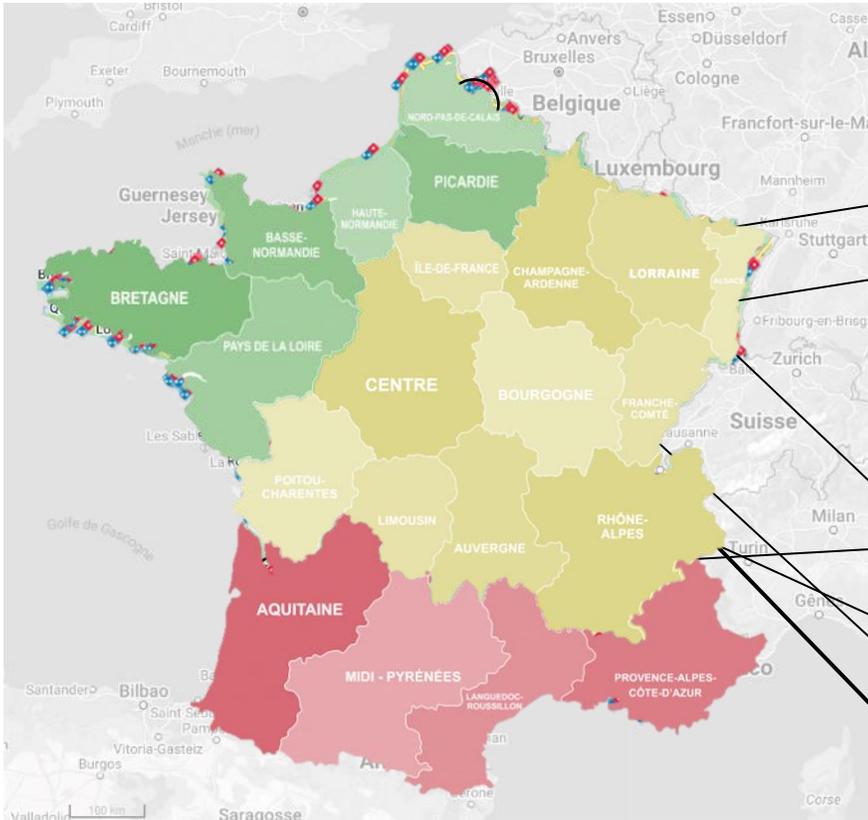
WE ARE THE LARGEST PIZZA CHAIN IN ONE OF THE BIGGEST PIZZA MARKETS IN THE WORLD

AND STILL WITH ROOM TO GROW: IN PIZZA, IN DELIVERY AND IN QSR



Source: Company Data, Crest for Pizza category and QSR market, and Fox for Delivery category.

COUNTRY OVERVIEW FRANCE



BIGGEST REGIONS / AGGLOMERATIONS (CITY + URBAN AREAS)

Agglomeration / Region	Store Count	Population	Population/store . ▲
Rennes (plus urban areas)	22	462 000	21,000
Nantes (plus urban areas)	11	323 000	29,363
New South Wales (Australia)	201	8.17 millions	40.626
Netherlands (current)	373	17.9 millions	48,117
France (long term outlook)	1000	68.4 millions	68,400
Bordeaux (plus urban areas)	11	831 000	75,545
Lille (plus urban areas)	13	1,18 million	90,769
Lyon (plus urban areas)	11	1,77 million	106,900
Inner-Paris	20	2,14 millions	109,000
Paris / IDF Region	108	12 millions+	111,000
France (current)	482	68.4 millions	141,900

68,4 MILLION POPULATION

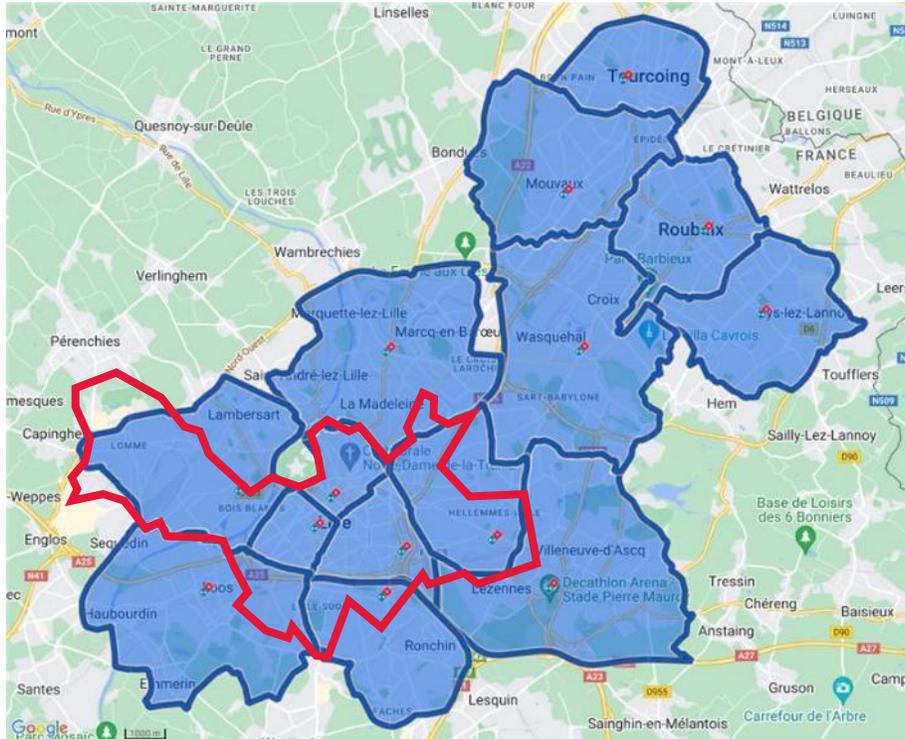
AMONG THE HIGHEST PIZZA CONSUMPTION GLOBALLY (1)

1) Reference: **The French are the biggest pizza eaters in the world:** <https://www.rtl.fr/actu/economie-consommation/info-rtl-les-francais-sont-les-plus-gros-mangeurs-de-pizzas-au-monde-7900342021>

Note: colour shadings are for visual representation only, and do not represent the potential or unit economics of individual cities or regions. They are also not comparable across markets.



A TYPICAL CITY – LILLE (North)



Lille is France's 5th largest city with its urban areas, with a population of 1.058.439.

The inner-city (borders in red) has 5 stores and it's the 10th most populated city in the territory.

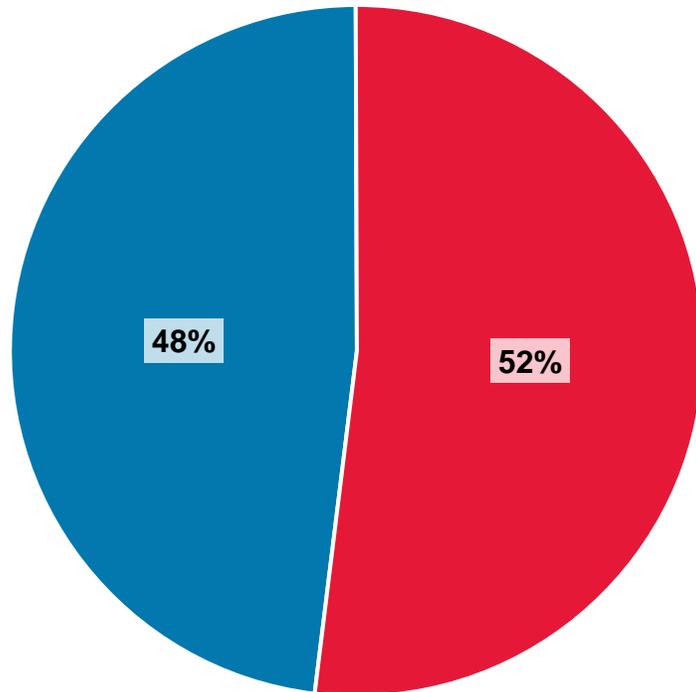
Fact: the 5 stores in the center city are corporate stores

Lille has the best population / store rate among the larger cities in France

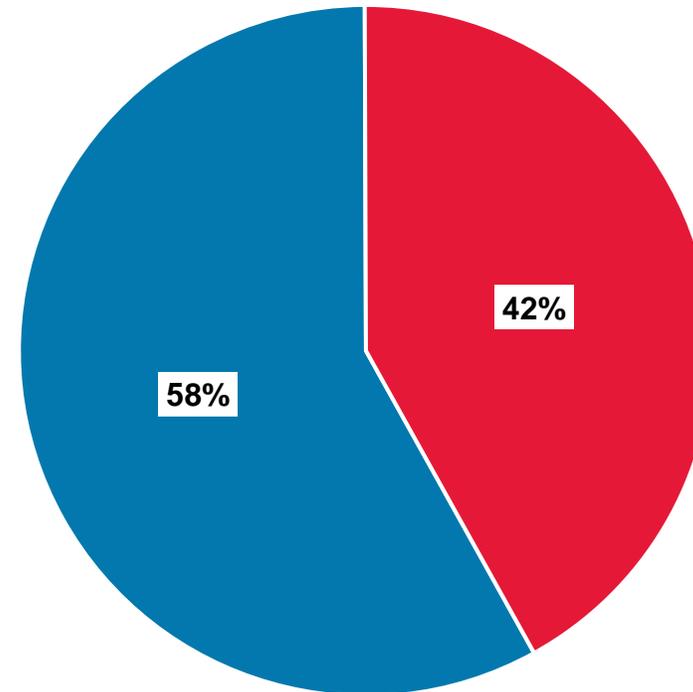
City (city centres minus urban areas)	Population	Stores	Population / Store ▲
Rotterdam (NL)	671.120	16	41.945
Lille	236.706	5	47.341
Rennes	225.000	4	56.250
France (long term outlook)	68,400,000	1.000	68.400
Montpellier	303.283	4	75.820
Lyon	537.000	7	76.714
Bordeaux	250.000	3	83.333
Toulouse	503.481	6	83.913
Strasbourg	290.576	3	96.858
Paris	2.145.906	20	107.295
Nantes	324.580	3	108.193
France (current)	68.4 millions	482	141.900
Nice	342.669	2	171.334
Marseille	873.000	3	291.000



We have a significant opportunity to grow delivery, and digital sales



■ Delivery ■ Pickup



■ Online ■ Offline

The shift will come from incremental sales, not channel switching



CONSISTENT FOCUS TO DELIVER

Successful approaches from other markets are being applied – but more time is required



France

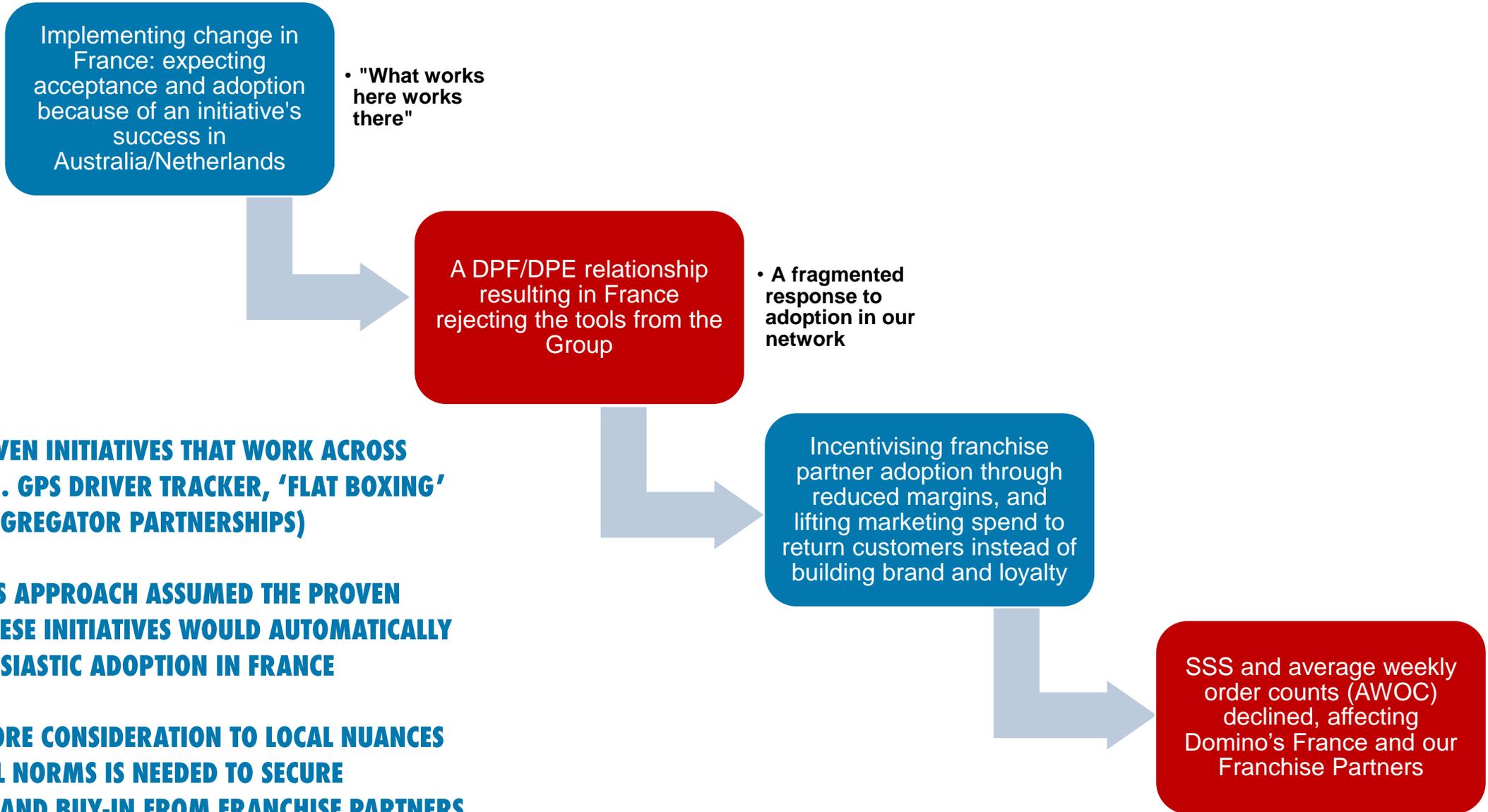
- Products including Burger Pizza range resonate locally
- My Domino's Box allows a low-entry point for customers
- Franchisee engagement, including aligning on marketing and pricing, does require more time

DPE H1 24 Market Presentation p22
"Markets in Focus – France and Japan"
Published February 2024

An uplift in average weekly order counts is needed to rebuild unit economics, and this work is ongoing



THE OLD APPROACH: WHERE WERE WE WRONG?



WE HAVE PROVEN INITIATIVES THAT WORK ACROSS MARKETS (E.G. GPS DRIVER TRACKER, 'FLAT BOXING' IN STORES, AGGREGATOR PARTNERSHIPS)

OUR PREVIOUS APPROACH ASSUMED THE PROVEN SUCCESS OF THESE INITIATIVES WOULD AUTOMATICALLY SECURE ENTHUSIASTIC ADOPTION IN FRANCE

HOWEVER, MORE CONSIDERATION TO LOCAL NUANCES AND CULTURAL NORMS IS NEEDED TO SECURE ENGAGEMENT AND BUY-IN FROM FRANCHISE PARTNERS



THE NEW APPROACH: WHAT ARE WE CHANGING?

WE WILL CONTINUE TO APPLY A PROVEN GLOBAL STRATEGY, ADAPTED LOCALLY

BUT WE WILL ENAGE OUR CAPABLE FRANCHISE PARTNERS BY BEING FIRM, FAIR AND FRENCH

THROUGH IMPROVED ENGAGEMENT WE ANTICIPATE WIDER FRANCHISE PARTNER ADOPTION OF THIS STRATEGY AND FLOW-THROUGH BENEFITS TO THEIR BUSINESSES

French Management empowered and trusted

- We absorb the global **philosophy** and proven strategies to adapt locally

One system, Food Safety improvement, Customer focus

- We apply leadership being **Firm, Fair and French**

Focus to drive change:
France leading trials in the Aggregator space;
Implementing our strategy to match the French market

We expect a near-term increase in SSS and AWOC



PROVEN PROMOTIONS

Menu pricing vs coupons = value vs 'cheap'

Les Menus

 <p>2 PIZZAS</p> <p>2 Pizzas à partir de 12,95€ (parmi une sélection de produits)</p> <p>Ajouter</p>	 <p>3 PIZZAS</p> <p>3 Pizzas à partir de 19,95€ (parmi une sélection de produits)</p> <p>Ajouter</p>	 <p>4 PIZZAS</p> <p>4 Pizzas à partir de 26,95€ (parmi une sélection de produits)</p> <p>Ajouter</p>	 <p>1 PIZZA + 1 ACCOMPAGNEMENT</p> <p>1 pizza + 1 accompagnement à partir de 9,95€</p> <p>Ajouter</p>	 <p>2 PIZZAS + 2 ACCOMPAGNEMENTS</p> <p>2 pizzas + 2 accompagnements à partir de 17,95€</p> <p>Ajouter</p>
--	--	--	--	--

FRENCH CUSTOMERS ATTUNED TO A MENU OFFERING IN CAFES, RESTAURANTS AND OTHER QSRs, CONSIDER A 'BUNDLE' OFFERING AS A VALUE PROPOSITION.

THE PRICING OF THESE MENU/BUNDLE OFFERS IS 'VALUE' FOR OUR CUSTOMERS



COUPONS, OR DISCOUNTS OFF INDIVIDUAL PRODUCTS, CAN BE PERCEIVED AS 'CHEAP'



Crazy days & lunch sales

“Mardis & Jeudis Fous” a brand within the brand



Attractivity, coherence between offer and profitability

Lunch Sales the right deal



Finding the right offer for the right audience.

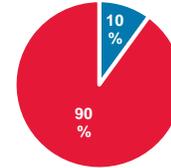


CONSISTENT PRICING

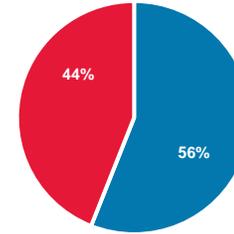
including a lower entry price

Franchise partners are increasingly aligning on five recommended pricing grids/tiers

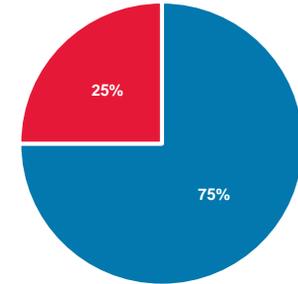
- YES
- NO



Before



Now



Target

Stores % aligned with the 5 recommended pricing grids – “Yes” represented in blue and “No” represented in red

Bringing in the Value Snacking range (4€)



The 5€ value proposition to fight the QSR



THIS IS NOT DISCOUNTING, BUT DELIVERING NEW CUSTOMERS ON NEW OCCASIONS AT HEALTHY MARGINS



THE DOMINANT SUSTAINABLE DELIVERY QSR IN EVERY MARKET BY 2030

Mission

Inspired Products & Services

Designed for Delivery



That are high quality and delivered quickly for an affordable price

$$\text{Value} = (\text{Product} + \text{Service} + \text{Image}) / \text{Price}$$

PRODUCT QUALITY: 4.5 DELIVERY: 18 MINS. NET PROMOTER SCORE

For all meal occasions

LUNCH: DOMINO'S BOX SNACKING: CALZ FAMILY BUNDLES/MENU
 DESSERTS: COOKIMINO'S FOOTBALL + PIZZAS



GROWING CUSTOMERS

INSPIRED PRODUCTS ON MORE OCCASIONS

Work on the “Domino’s Classics/Iconic” on differentiation



GROWING CUSTOMERS

INSPIRED PRODUCTS ON MORE OCCASIONS

INSPIRING PRODUCTS



NEW DELIGHTS



MENU DEALS & SNACKING OPTIONS



LEVERAGING COLLABORATIONS



STRONG GROWTH IN AGGREGATORS - PARTNERSHIPS

HISTORICALLY FRANCE (LIKE ANZ) HAS UNDER INDEXED ON AGGREGATORS VS OTHER EUROPEAN MARKETS

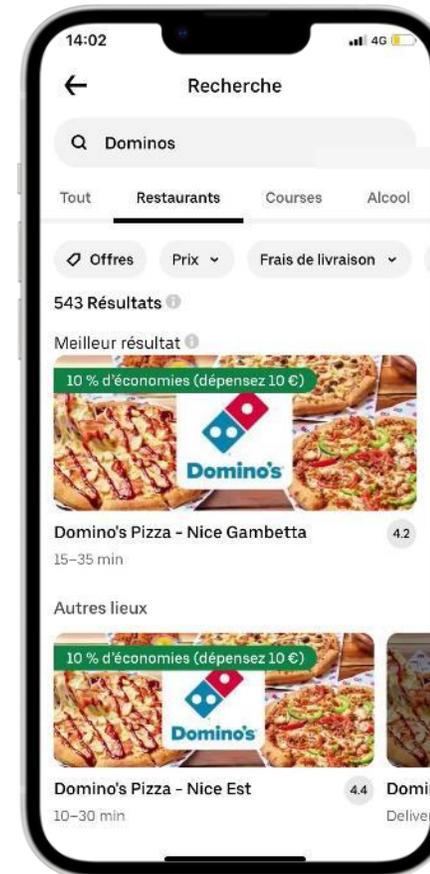
Aggregators are a key incremental growth opportunity

**10% of Digital Sales
(+80bps calendar ytd)**

Domino's has been on aggregators, but has stepped up engagement on these platforms:

- **Uber Eats**
- **Deliveroo**

We will soon connect the Uber API to OneDigital in France



DOMINO'S IS WINNING INSIDE AGGREGATORS THROUGH MORE ENGAGEMENT BY FRANCHISE PARTNERS

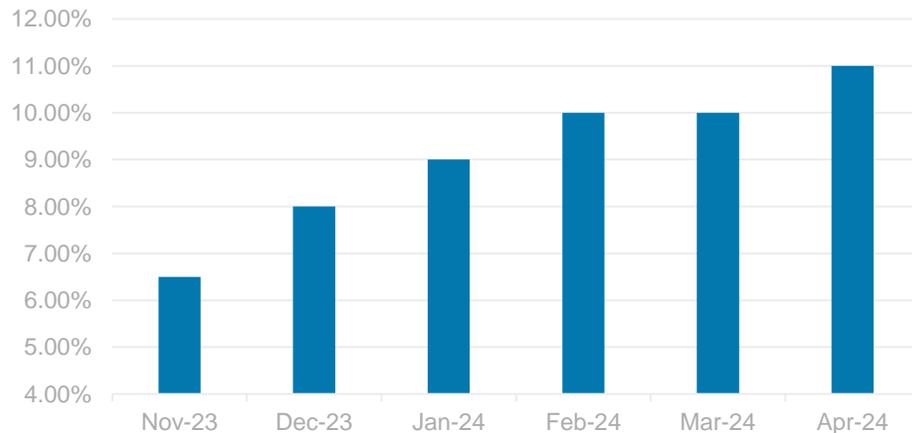
- **WINNING PIZZA SHARE**
- **GROWING CUSTOMER COUNTS**
- **BUILDING NEW OCCASIONS (INCLUDING THROUGH 3rd PARTY DELIVERY TRIALS)**

UBER ORDERS

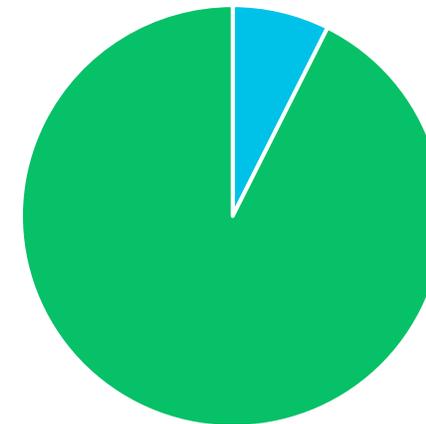
+40%

CALENDAR YEAR-TO-DATE

Market Share - Pizza Category (All Aggregators)



2024



■ Deliveroo ■ Uber Eats



Franchise partner engagement



WE HAVE HIGHLY EXPERIENCED FRANCHISE PARTNERS WHO HAVE THE DRIVE TO BUILD THEIR BUSINESSES

NUMBER OF STORES PER FRANCHISEE



FRANCHISE PARTNERS
+14

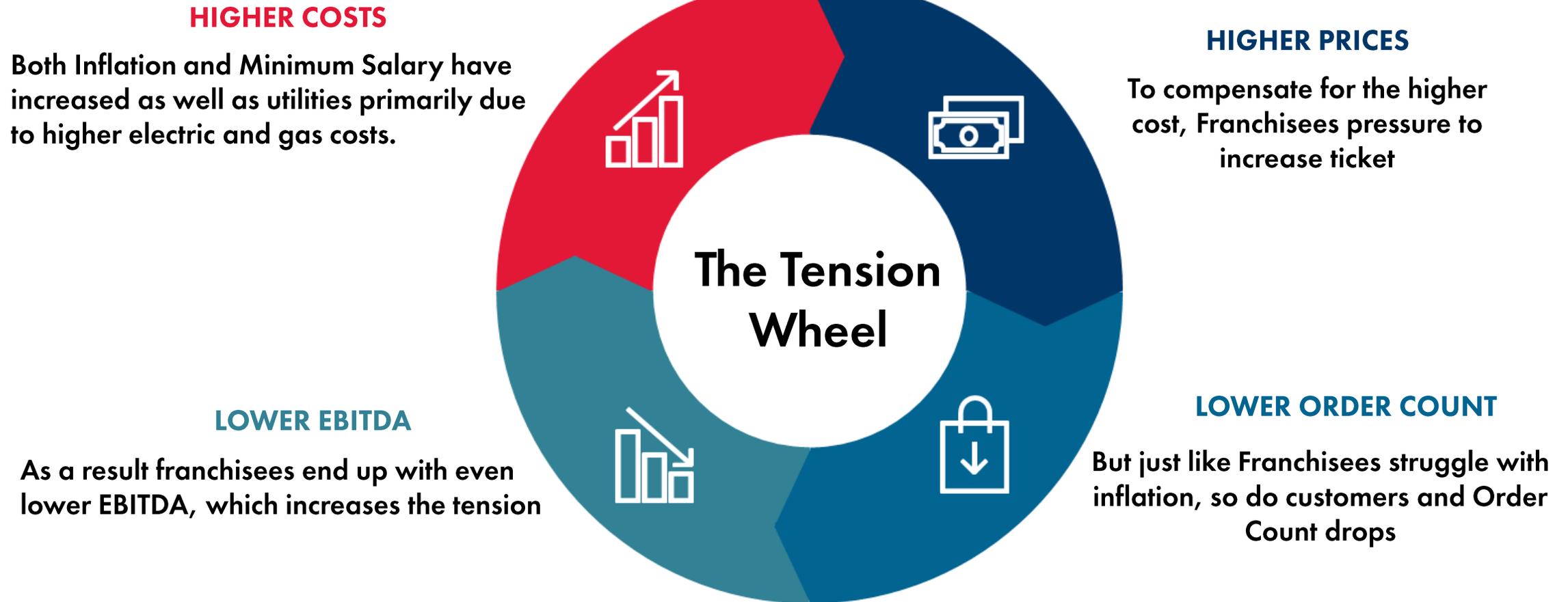
132 → 146

STORES PER FRANCHISE PARTNER
3



FRANCHISE PARTNER ENGAGEMENT & TRUST

Breaking the Tension Wheel



FRANCHISE PARTNER ENGAGEMENT & TRUST

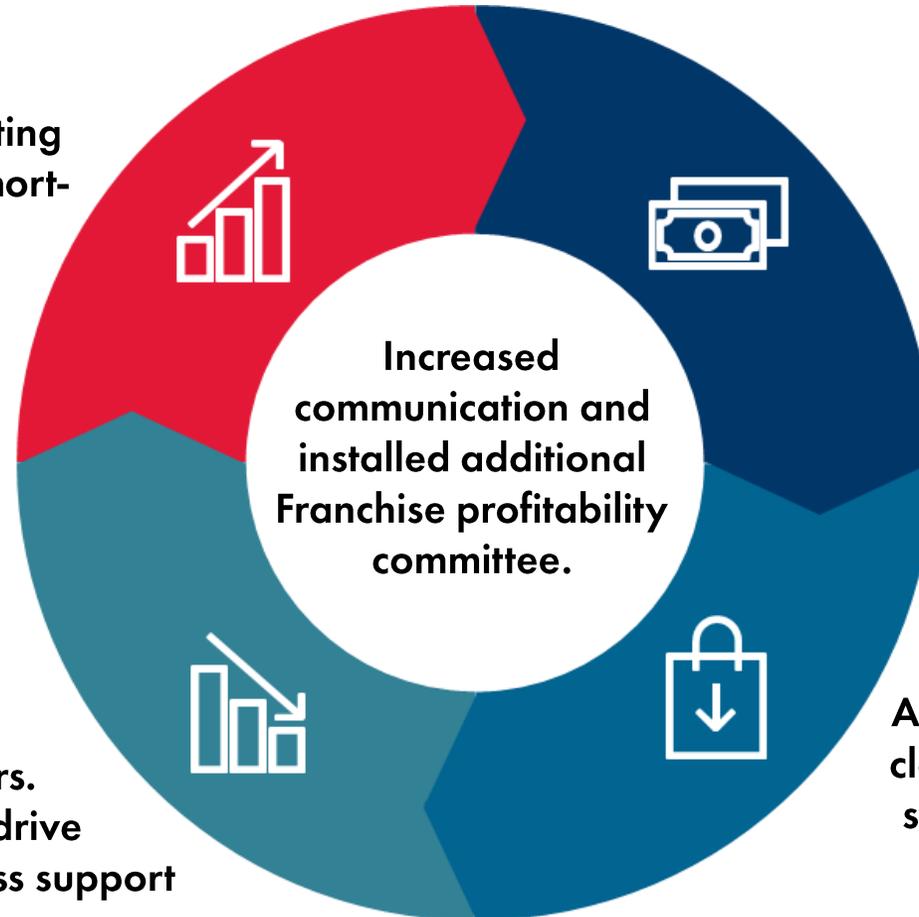
We can reverse this: delivering for customers and franchise partners

REDUCE COSTS

Put in a food-rebate program, reinvesting from savings initiatives, to help with short-term profitability, conditional on operational performance.

HIGHER EBITDA

A firmer stance on operations has seen the exit of some franchise partners. Improved execution, balanced prices drive order counts, lift profits and require less support



BALANCED PRICES

High level of engagement with new, consistent pricing tiers, which deliver margin for franchise partners, and value for customers

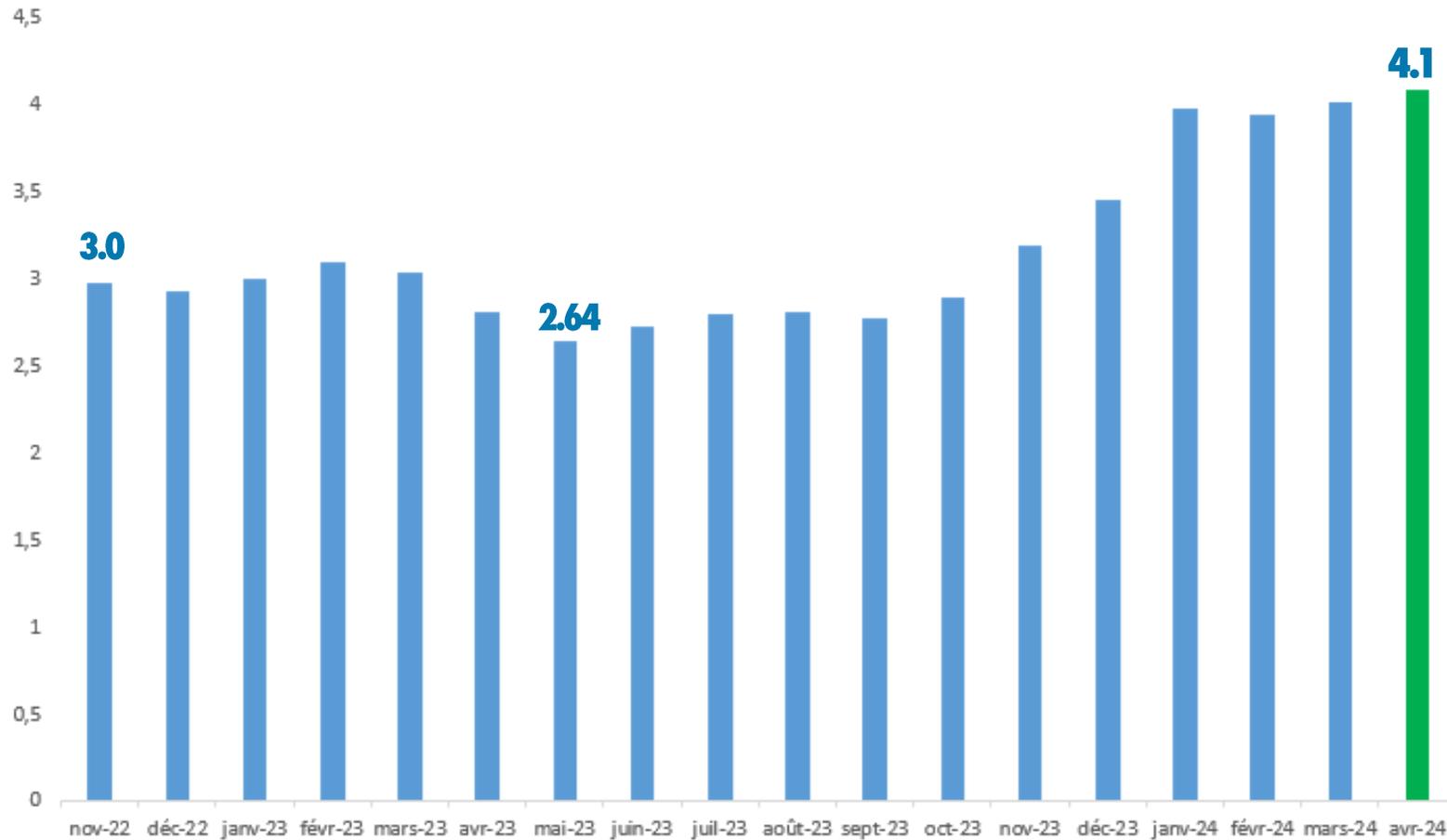
LIFT ORDER COUNT

A roll-out of 3rd party delivery in currently closed hours (e.g. after lunch) will be ONE sales driver, at high contribution margins



CUSTOMERS RECOGNISE OUR IMPROVEMENT

Customer relationship rating



+37%
CUSTOMER
SATISFACTION
VS LAST YEAR



WE ARE NOT STOPPING HERE – DEVELOPING OUR FRANCHISE PARTNERS¹⁵

INSTORE RECRUITMENT AND TRAINING

- New training department formed
- Upgraded and standardised job advertisements
- Launching training for instore recruitment
- In-store class training
- **Path to Excellence roll-out**
 - Renewed road safety training
 - Modernising learning material



Franchise Partners training program – improve knowledge of existing or new daily useful tools



FRANCHISE PARTNER DEVELOPMENT

- Lifting operational expectations of all franchise partners
- Extending product testing with regular Operational Evaluations (OER)
- Working in partnership to lift product quality scores to 4.5
- Building new local store marketing training program
- Launched new franchisee training program, targeting managers => franchise partners
 - Two-day workshop
 - Covering Domino's and partner platforms
 - Learning from experts including other franchise partners







Fondation Domino's

Abritée par la Fondation de France

- **Charity created in 2021**
- **Hosted in "Fondation de France"**
- **2 associations financially supported**
- **5 DPF staff, 2 Franchise partners (to be renewed) and 4 external experts composing the executive board**
- **Focusing on School inclusion and equal opportunities, and orientation for children with a disability and young teenagers (mainly by developing materials adapted to their situation)**
- **DPF engagement to Charity : 200K€ in 5 years**
- **National campaigns to raise donations + Round up for charity all year on OLO order**

10,284 €

LAST 6 MONTHS OLO ROUND UP

OUR CUSTOMERS CARE

18,626 €

2 NATIONAL CAMPAIGNS

FRANCHISE PARTNERS ENGAGEMENT

37,000 €

WORLD PIZZA DAY

DPE WORLDWIDE INITIATIVE

Amount of donations transferred to the "Fondation Domino's"

Roundup on OLO shows engagement from our customers and national or international campaigns supported by our Franchise Partners and Domino's Pizza France





Nord collèges
le Département est là
Arthur-Rimbaud
VILLENEUVE D'ASCQ



LONG TERM OUTLOOK - France

DOMINO'S IS ONE OF THE FIVE LARGEST QSR BUSINESSES IN FRANCE – WITH ROOM TO GROW

THE QSR AND DELIVERY MARKETS ARE SUBSTANTIAL, WE INTEND TO EARN OUR SHARE

HIGHER SALES WILL LIFT PROFITS FOR FRANCHISE PARTNERS AND DOMINO'S

OUR CHANGED ENGAGEMENT APPROACH WITH FRANCHISE PARTNERS IS SHOWING EARLY SIGNS OF PROMISE

WE HAVE THE FRANCHISE PARTNERS, MENU, TECHNOLOGY AND CUSTOMER VALUE TO GROW

WE INTEND TO BE RECOGNISED AS A PILLAR OF SUCCESS IN DOMINO'S PIZZA ENTERPRISES LTD



CURRENT STORE COUNT

482

FUTURE STORE OUTLOOK

1,000 (+107%)





DESIGNED TO DELIVER.