

BIPROGY Group Retail Business Briefing

March 30, 2026
BIPROGY Inc.

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the Management Policies (2024-2026)

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Positioning of the Retail Area in light of the Management Policies (2024-2026)

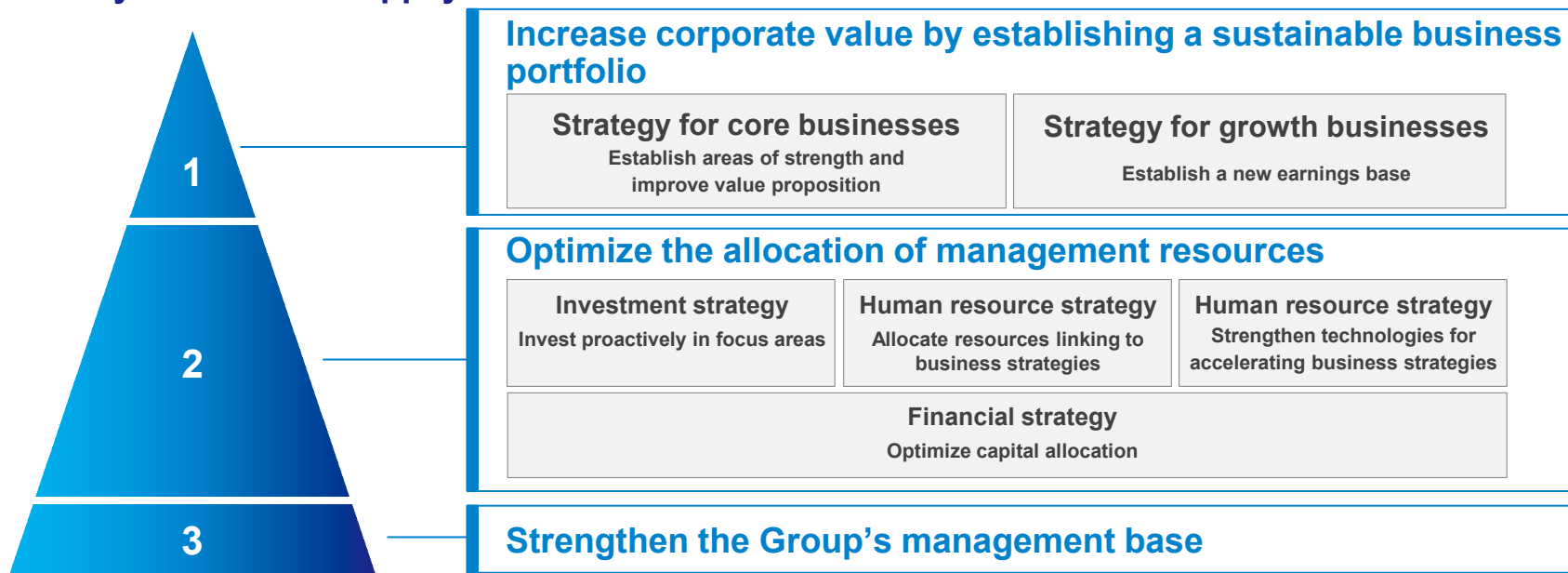
Koji Katsuya
Representative Director, Executive Corporate Officer
BIPROGY Inc.

Core Businesses and Growth Businesses under the Management Policies (2024–2026)

- ✓ We will work to realize Vision 2030 through three basic policies

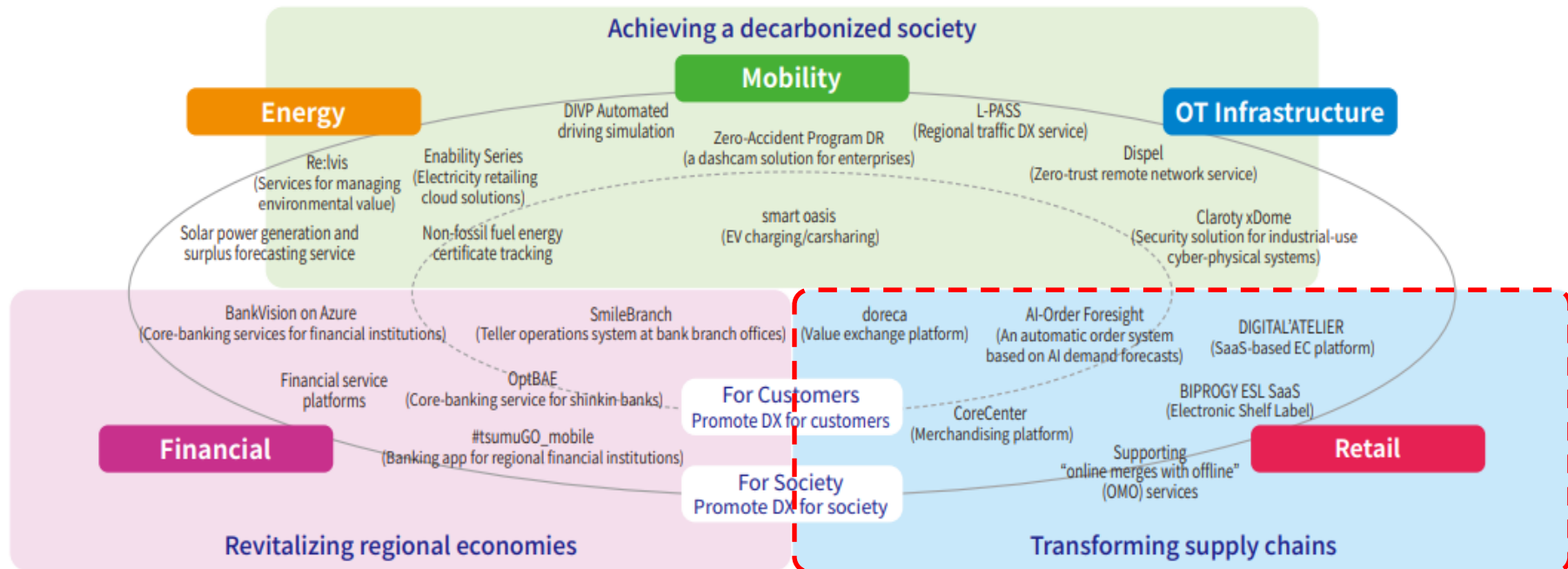
Vision2030

We will develop the Digital Commons which is a platform that helps create a society where everyone can live happily.



Positioning of the Retail area within the Core Businesses

- ✓ The retail area is one of the focus areas where the Group can leverage our excellent customer base and our thorough operational and customer knowledge. By concentrating management resources in this area, the Company aims to enhance profitability.



Our Initiatives in the Retail Area

**Akinobu Murakami
Corporate Officer
BIPROGY Inc.**



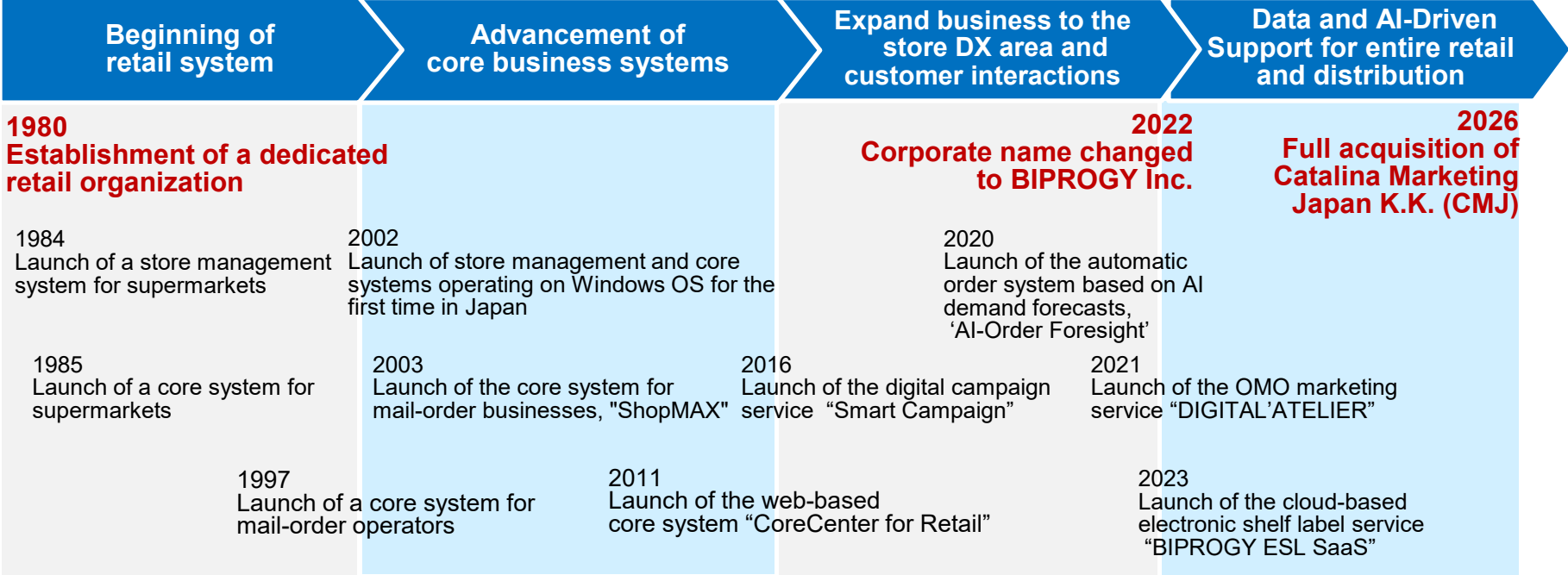
Akinobu Murakami
Corporate Officer

< Brief Profile >

- 1992 Joined the company
- 2017 Director, Retail Sales 1, Industry Market 1
Retail Services Business Plan (BP) Owner
- 2019 Director, Sales 1, Industry Market 2
- 2023 General Manager, Industry Market 1
Part-Time Director, Canal Payment Service, Ltd. (present)
- 2025 Corporate Officer
(Responsible for: Industry Market 1, Industry Market 2, Retail Area)
- 2026 Part-Time Director, Catalina Marketing Japan K.K. (present)

Business Strategies in the Retail Area: A Forty-year Legacy of Initiatives

For more than 40 years since 1980, we have expanded our initiatives beyond core systems to encompass store DX, D2C, and CX areas. We will enhance our future attempts in supporting the entire retail and distribution industry based on data and AI.

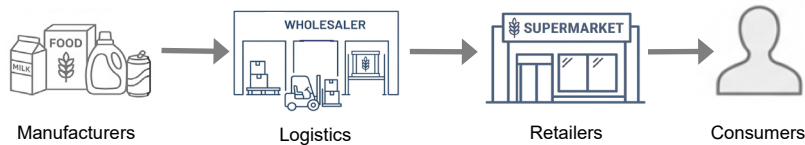


Business Strategies in the Retail Area: Direction of the Retail and Distribution Industry

As the advancement of DX has led to the digitization of consumer behavior and store information, the conventional supply chain is increasingly shifting toward a demand chain centered on consumers and local communities.

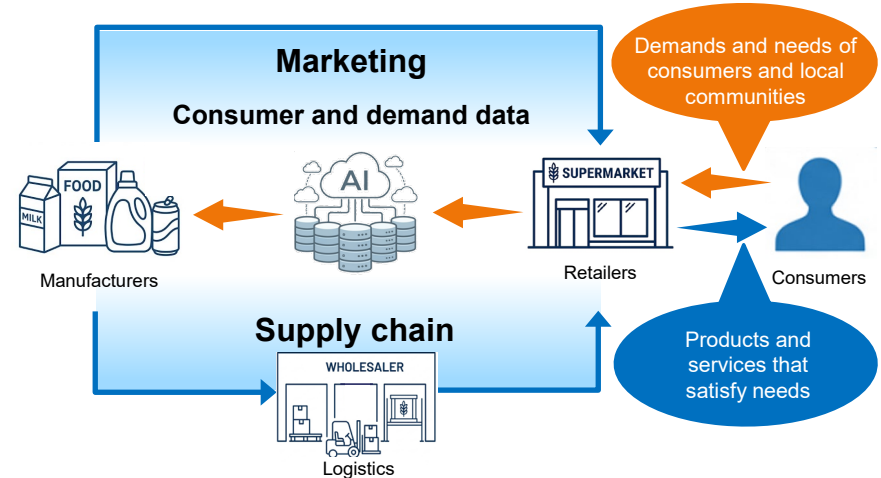
Conventional Supply Chain

A model in which manufacturers anticipate needs and demand and supply information and products accordingly



Retail and Distribution Demand Chain

A model in which the supply chain and marketing respond with the needs and demand of consumers and local communities as a starting point



Business Strategies in the Retail Area: Four Strategic Areas and Progresses

Through fiscal 2025, we focused on retail and primarily built up assets in "Store Digitalization", "D2C", and "CX", as well as "OMO", which connects them.

Store digitalization: physical store

Supporting retailers' headquarters and store operations through digitalization

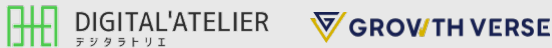
- "CoreCenter," that supports retailers' core businesses
- "AI-Order Foresight," automatic order system based on AI demand forecasts,
- "BIPROGY ESL SaaS", automatic price tag replacement



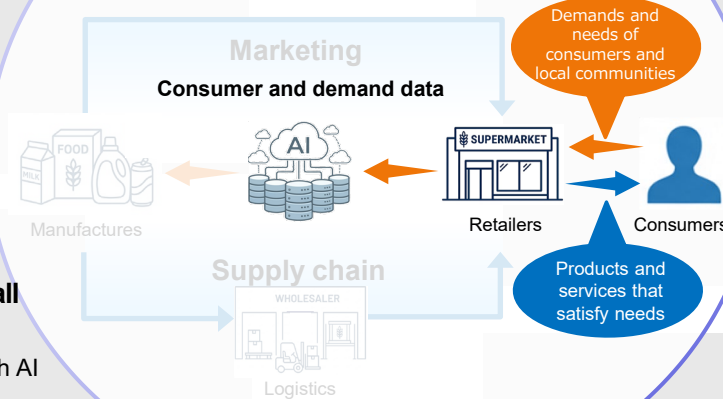
D2C: mail-order / EC

Support multi-channel sales from own company's website and online shopping mall

- "DIGITAL'ATELIER," an EC and OMO platform
- "GROWTH VERSE", deploying CRM, etc. through AI



Develop and enhance retail-focused assets by FY2025



CX: at points of contact with consumers

Support understandings of consumers and communications via optimum means

- "Needs Connect," that collects consumer needs via retail apps
- "Smart Campaign", enabling various app campaigns
- "Live kit", that support live communications



OMO: Data and service integration

Prepare and consolidate retail data for AI utilization and service integration



About Catalina Marketing Japan K.K. (CMJ)

Establishment, independence, and a new phase of growth

CATALINA[®]

**Business
Summary**

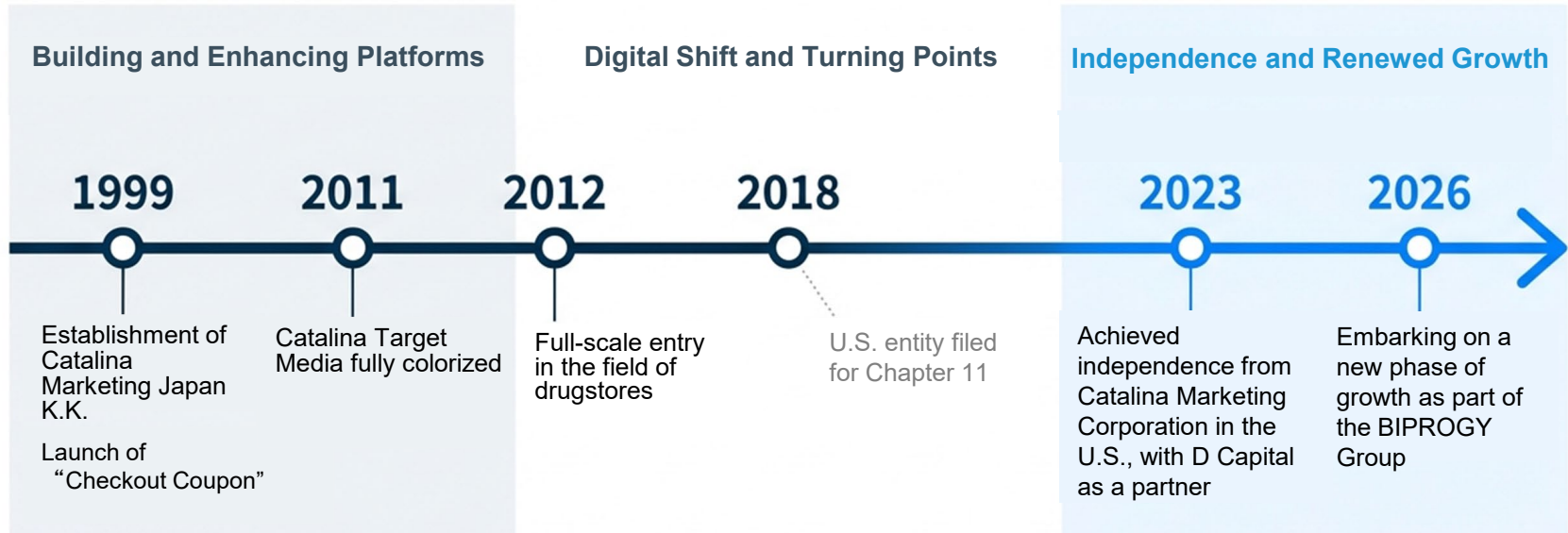
Various types of marketing support on the basis of actual purchase data

【Creating Marketing Strategies】

- Market survey
- Establishing marketing guidelines

【Creating Marketing Measures】

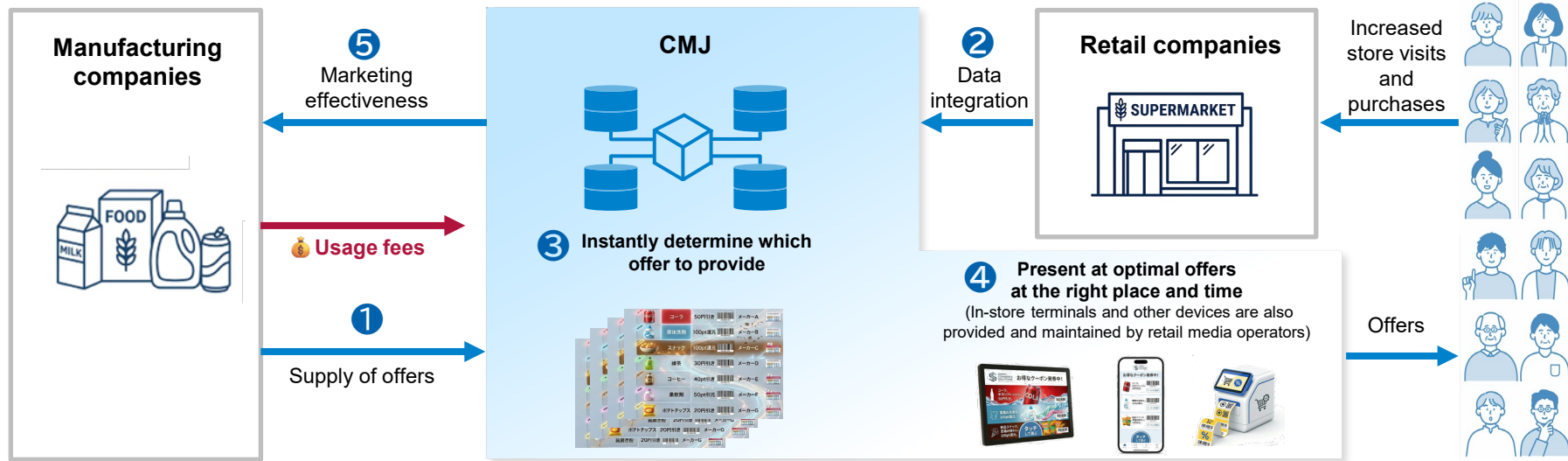
- In-store advertising, sales promotions
- Digital advertising



CMJ's Business Model

Business of implementing optimum marketing measures predicated upon retail purchase data, etc. on behalf of manufacturers

- 1 Receive consumer offers (such as discounts and sampling) from manufacturers based on their marketing plans
- 2 Purchase data is sent to CMJ the moment a purchase is made by consumers.
- 3 Instantly determine which offer to provide for each consumer.
- 4 Distribute offers through media developed in collaboration with retailers, including in-store channels, applications, and social media.
- 5 Demonstrate measurable effects extending to actual purchases and customer retention, which cannot be achieved through traditional advertising or web advertising.



CMJ's Business Model

AOUMI is CMJ's core business and one of the nation's largest retail media networks.

Manufacturers can implement marketing measures by leveraging retail revenue data amounting to **14 trillion yen** from **130 or more retailers** nationwide, representing **13,000 stores** and **150 million IDs**.

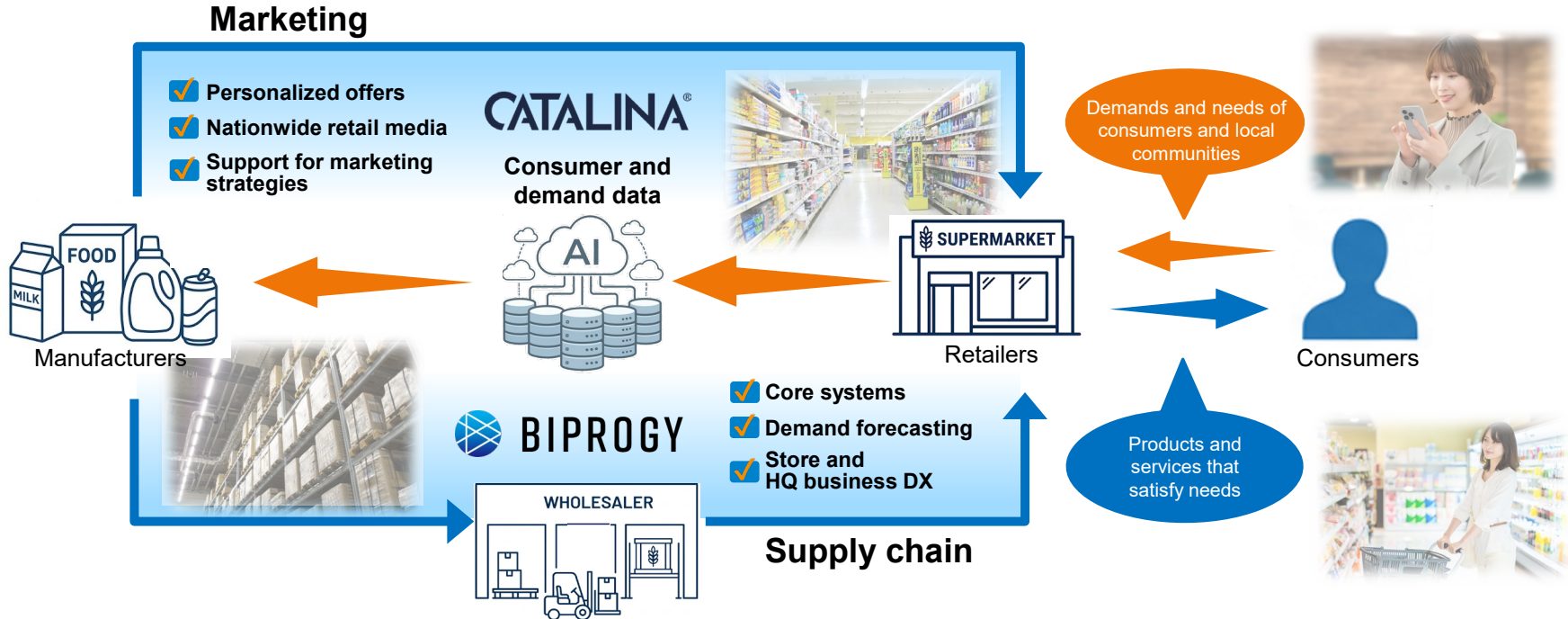
Note: Implementable marketing measures differ for each retailer.



90% or more of key consumer goods are purchased at physical stores in Japan. AOUMI captures more than approx. 55% of such purchases.

Challenge taken on by BIPROGY Group

Establish an industry-first platform business integrating marketing and the supply chain.



Growth of 'AOUMI', CMJ's Core Business

Supporting AOUMI's growth with BIPROGY's technology



**IT platform
technologies**

**Service
development
capabilities**

**AI
technologies**



- **Addressing a growing retail media market**
 - The market reaching 1,090.5 billion yen in value by 2035*
 - AOUMI rapidly expanding into drugstore market, etc.
 - ➔ **IT platform support provided by BIPROGY**
- **Strengthen service development capabilities to respond to markets**
 - Carving out from Catalina Marketing Corporation in the U.S. to agilely meet domestic demand
 - ➔ **Service development collaboration with BIPROGY**
- **Acceleration of AI use**
 - AI is undergoing rapid evolution
 - With data integrity ensured, embedding AI into services and operations
 - ➔ **Alignment with BIPROGY's AI investments**

Enhancement of Marketing Solutions for the BIPROGY Group

Integration of both companies' marketing solutions, covering the process from collecting consumer needs to delivering special offers

Digital Experience



Collect product reviews and customer requests



Special offers of personalized price discounts and free samples



A wide variety of offer variations, such as cashback, merchandise, and event invitations

Strategy to increase satisfaction of consumers



In-store Experience

Free Product Coupon



Special offers of personalized price discounts and free samples



Obtaining offers through in-store displays

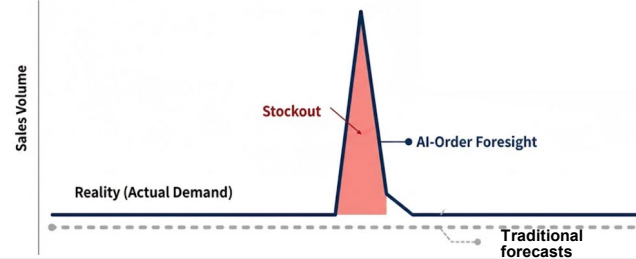
BIPROGY ESL SaaS

Integration of Marketing and Supply Chain by the BIPROGY Group

Integrate CMJ's marketing capabilities with BIPROGY's supply chain capabilities to create a new platform business

Reduce stockouts and overordering

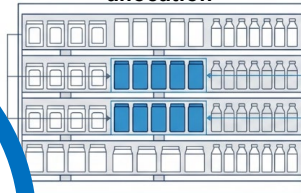
Avoid stockouts by importing CMJ's campaign plans into a demand forecast AI



In-store Optimization

CMJ's campaign plans synced with AI planogram and stocking support system

Optimize shelf allocation



Stocking support



Optimization of overstocking levels

Detect overstocking and implement campaigns for inventory optimization



Dynamic Creative

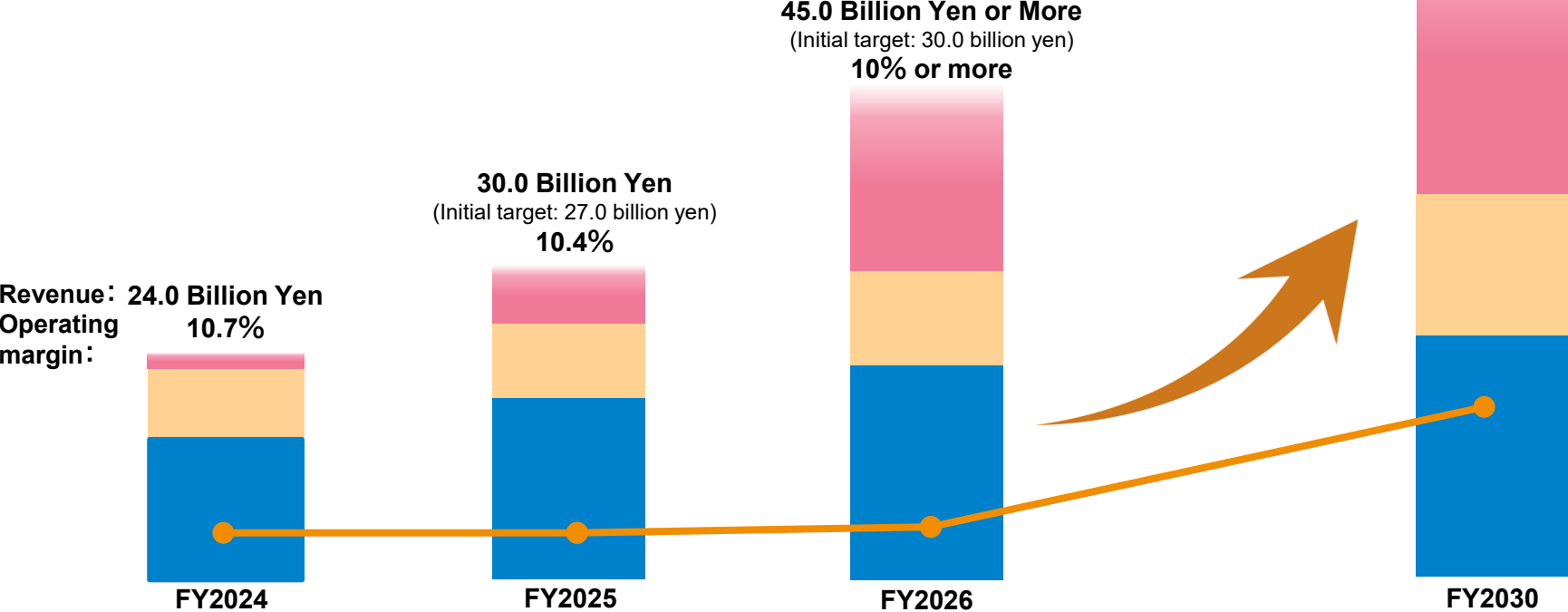
Dynamically adjust creative elements, such as ESLs, in line with visiting customer attributes



BIPROGY Group: Growth Vision for the Retail Area

Including synergies with CMJ, the Group aims to drive growth across four domains, namely “Store Digitalization,” which promotes DX in store operations, “D2C,” which supports e-commerce and mail-order businesses, and “CX” and “OMO,” which advance consumer touchpoints and data-driven businesses. Through growth in these four domains, the Group aims to achieve Revenue of approx. 60 billion yen in FY2030.

Revenue: 60.0 Billion Yen or More
 Operating margin: 20% or More



Appendix

Rapid Growth of the Retail Media Market

The retail media market will experience approx. tenfold growth by 2035.

Advertising and sales promotion spending is shifting toward higher-ROI marketing activities.

Rapid Market Growth Toward 2035

2035
1,090.5 billion yen

Approximately tenfold growth
is expected within the next ten years

2025
119.0 billion yen

Target budget of 3.8 trillion yen

Sales promotion
expenses of
2.2 trillion yen

Advertising
expenses of
1.6 trillion yen

Budget pool of
3.8
trillion yen

Shifting to retail media

- Coupon, Reward points
- Discounts
- Rebates
- Newspaper inserts

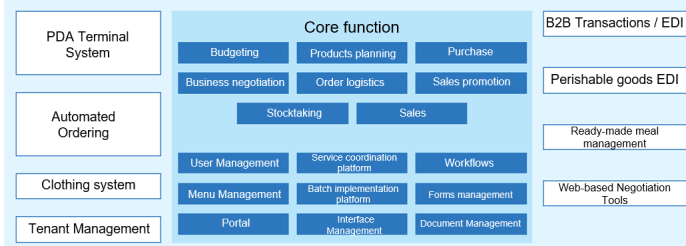
- Online advertising
- TV commercials
- Out-of-Home advertising

Key Topics of FY2025

CoreCenter for Retail

24
corporate customers

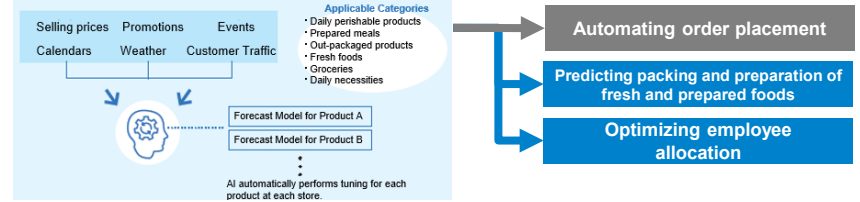
- We obtained customers comprising 8% of the supermarket and drugstore market during the current Management Policies period.
- We will expand our market share by securing key customers influencing M&A in the restructuring retail industry.



AI-Order Foresight

10
corporate customers

- Drive implementation by developing a suite of functionalities conducive to broadening the use of demand forecast data
 - ➔ The solution is used to predict production, packing, and stock replenishment of perishables and prepared meals, as well as to automate order placement.
 - ➔ Store-level demand forecasting data will be used for purposes such as optimizing employee allocation in the future.



BIPROGY ESL SaaS

14
corporate customers

- Following the implementation of ESL, progressively develop a range of ESL-based services to streamline store operations, thereby upgrading to an ESL solution.
 - ➔ Automate discount labeling operations, which account for more than 10% of tasks in fresh food and prepared meals operations, using ESLs.
 - ➔ By displaying order data from AOF on ESLs through system integration, duplicate orders are reduced.



Needs Connect

New

- 'Needs Connect', which enables retailers and manufacturers to gather consumer needs via an app, will begin serving two major retailers following its release in March 2026.





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(Note)

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