



THE MARKET

Australian owned and operated, Domino's Pizza Enterprises Limited ("Domino's") and its franchisees operate more than 660 stores across Australia, New Zealand, France, Belgium and the Netherlands. Across these markets, the Company and its franchisees employ more than 16,000 casual and full-time staff, making over 60 million pizzas each year.

Domino's operates within the Quick Service Restaurant (QSR) pizza segment of the fast food market. According to Euromonitor, the Australian fast food market grew from \$7,763 million in 2000 to an estimated \$9,030 million in 2004 and is estimated to grow to \$10,287 million by 2008.

Domino's estimates the value of the Australian pizza market, comprising QSR outlets, small chains and independents, at more than \$1.6 billion. The Australian QSR pizza market was estimated by BIS Shrapnel to be worth more than \$663 million in 2004, equating to approximately 40% of the Australian pizza market and approximately 7.3% of the total Australian fast food market.

Australia's only publicly-listed pizza chain, Domino's Pizza Enterprises Ltd is the largest



relationships among employees, customers and partners.

Partners Foundation

The Partners Foundation is the Company's internal charity, assisting team members in times of tragedy. The Foundation has donated more than \$240,000 to over 100 team members who have fallen on hard times. The Partners Foundation reflects Domino's culture of camaraderie, passion, and support.

Domino's Luv Lab

The Domino's Luv Lab is Australia's first dedicated pizza research and development kitchen. The Luv Lab specialises in designing systems, food and equipment, and ensures quality, consistency, efficiency and safety

across all stores by focusing on quality assurance and occupational health and safety.

Internet and Mobile Phone Ordering

Domino's launched mobile phone ordering in September 2005, allowing pizza lovers to order on the run. Shortly afterwards, it became the first major pizza chain to offer its customers nationally the convenience of ordering online. Customers can also watch the progress of their pizzas online in real time with a special "anticipation clock".

First Listed Pizza Maker

In May 2005, Domino's became the first Australian pizza maker to list on the Australian Stock Exchange. This move helped to spur Domino's' expansion into new markets, including New Zealand and Europe.



international franchisee for Domino's Pizza Inc; a global brand founded by Thomas and James Monaghan in 1960 in the United States. Domino's Pizza Inc is the recognised leader in pizza delivery, operating a network of over 8,000 stores in more than 50 countries.

ACHIEVEMENTS

Since its inception, Domino's has delivered a series of products and innovations which have revolutionised the Australian pizza industry.

Pizza Delivery

Domino's was the first in Australia to introduce home pizza delivery in 1980. This concept soon proved extremely popular, prompting competitors to follow suit.

Hot Cell Bags

Introduced in 2000, Domino's' Hot Cell bags were Australia's first electronic hot bags for pizza delivery. Using a patented state-of-the-art heating element and special insulation material, Domino's Hot Cell works like a portable oven ensuring pizza is delivered up to 20 per cent hotter.

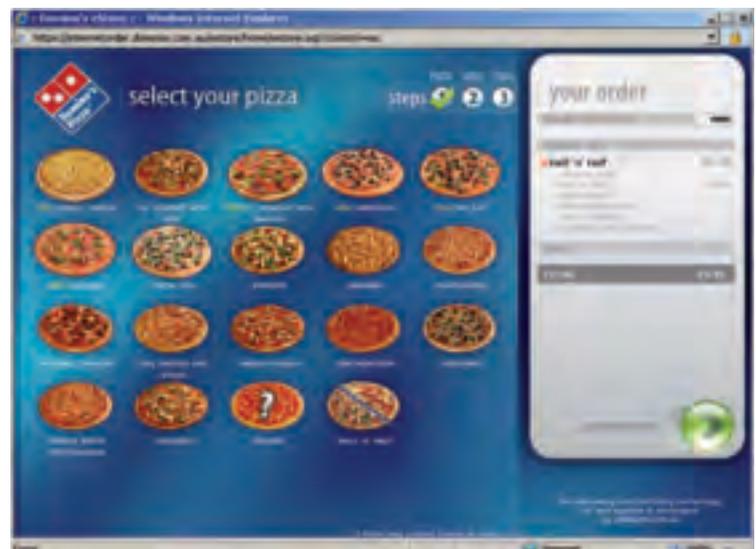
Classic Crust

Designed to fill the gap between Deep Pan and Thin 'n' Crispy bases, the Classic Crust was introduced in 2002 by Domino's CEO Don Meij.

The pizzeria-style crust now accounts for almost half of all Domino's sales.

Pizza College

Domino's has partnered with the Gold Coast Institute of TAFE and its corporate business division, OSR Business Solutions, to offer Domino's team members accredited training courses and nationally recognised qualifications. This initiative has been designed to drive performance, support personal and professional growth and enhance



HISTORY

The first Australian Domino's store opened in Springwood, Queensland on 27 December 1983. The brand quickly expanded throughout Brisbane, Sydney and Perth.

In 1993, Silvio's Dial-a-Pizza purchased the Australian and New Zealand master franchise, and between 1993 and 1995 the Domino's and Silvio's Dial-a-Pizza brands operated separately. In 1995, the decision was made to combine operations and convert the Silvio's Dial-a-Pizza stores to Domino's stores and they were progressively re-branded.

In 2001, the foundations of the current Senior Management Team came together when Don Meij and Grant Bourke, the two largest Domino's franchisees in Australia, merged their 25 franchised stores in return for a share in the company.

In 2003, Domino's expanded into the new markets of Victoria, Australia, and New Zealand. Two years later, in May 2005, Domino's became Australia's first publicly-listed pizza maker on the ASX. In July 2006, Domino's entered the European market.

Today, Domino's operates over 660 stores across five markets, with annual network sales of more than \$518 million*.

THE PRODUCT

Fresh ingredients and fresh ideas continue to set Domino's apart from its competitors. Great-tasting pizzas start with fresh quality ingredients. The new product team works hard to source farm-fresh, high-quality vegetables, herbs and choice cuts of meat from local farmers in each market.

All Domino's pizzas are made fresh to order, using the freshest ingredients and freshly-made classic and pan dough. This ensures that each pizza is customised the way customers like it.

The introduction of Awesome Extras: Homer Hudson Ice Cream, Jumbo Chicken Wings, Chicken Kickers, Brownies and Cheesy Garlic Bread offer customers a complete menu solution.

RECENT DEVELOPMENTS

2006-07 was a year of solid growth for Domino's. The Company added 225 stores to the network, bringing the total store number to 663 stores, a 51% increase in store numbers over the previous year*.

In July 2006, the Company secured a substantial platform for future growth with the acquisition of the master franchise for Domino's in Belgium,

France, the Netherlands and the Principality of Monaco. This acquisition gave the company an additional 155 stores and re-forecast its expansion target to more than 1,600 stores world-wide.

During the year same store sales grew 3%, including a 13.98% surge in European same store sales, while revenue climbed 33.1% to \$230.1 million.

As part of the Company's strategy of exploring opportunities for vertical integration, Domino's opened an in-house equipment maintenance and supply department, Domino's Service and Supply. The department works directly with manufacturers to develop equipment especially tailored for Domino's outlets. Operating from one central location has generated greater synergies of business efficiency and improved the Company's logistical advantage. It has also given Domino's better control over quality.

Domino's Image 2020 stores are currently being rolled out across Australia and New Zealand. These new look-stores feature a fresh, colourful and eye-catching design, with limited seating areas, better placement of menus, enhanced counters and the latest technology to help deliver quality products to pizza customers.

PROMOTION

Domino's is one of the most recognised brands in Australia. Its catchy tagline "I've got the hots for what's in the box with the dots" is firmly etched in the minds of Australian pizza lovers thanks to a series of television advertisements and local store marketing.

Eye-catching direct mail ensures that households are informed of new products and offers and that Domino's continually remains top of mind.

In order to continually build awareness and a loyal customer base, Domino's stores are involved with their local community through sponsorship programs and the employment of local people.

BRAND VALUES

Domino's remains the dominant pizza maker in Australia and one of the fastest growing pizza makers in New Zealand. Its pizzas are enjoyed by over 5% of Australian homes each week – that's upwards of 800,000 pizzas per week.

The Domino's brand is currently evolving with a new brand position - The Domino's Effect™.

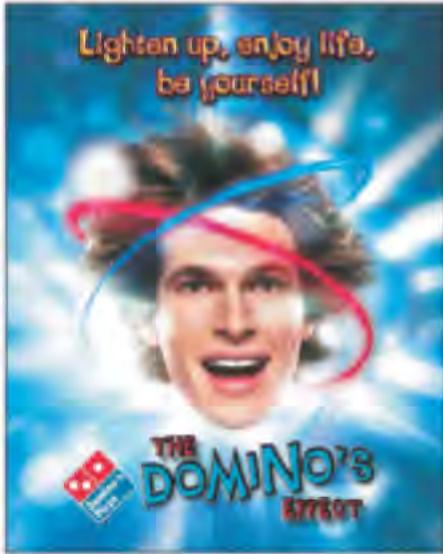
The Domino's Effect™ aims to encourage consumers to lighten up and enjoy life, through a

variety of consumer touch points including advertising, local store marketing, in-store communications, online and viral marketing, packaging, uniforms, customer activity, promotions and internal activity.

The underlying brand values; Fun, Youthful, Fresh, remain at the core of The Domino's Effect™.

The Domino's Effect™ firmly reflects the elements of connecting people in a fun way. Whether it is catching up with your mates or enjoying a meal with the family, Domino's offers a range of tasty treats to make every occasion fun and memorable.

*Current as at 23 August 2007



THINGS YOU DIDN'T KNOW ABOUT DOMINO'S

- Each year Domino's uses more than 4,500 tonnes of pizza sauce and 7,000 tonnes of cheese to cook about 50 million pizzas across Australia and New Zealand.
- The NRL State of Origin Final is one of the busiest nights of the year for Domino's with footy fans tucking into around 100,000 pizzas across Queensland and New South Wales.
- Orders from mobile phones now account for more than a fifth of total orders. Domino's introduced a special mobile phone ordering system in 2005 which allows customers to nominate their nearest store.
- Domino's drivers make over 92,000 pizza deliveries each week.
- Residents of the regional Queensland city of Bundaberg lay claim to eating the most Domino's pizzas in one day. On 10 December, 2005, Domino's Bundaberg store sold 5,382 pizzas – more than double what the average Domino's store sells in one week!
- Kincumber is home to Australia's fastest pizza makers. A team of four Kincumber Domino's team members won the 2007 National Pizza Make Competition after making six perfect pizzas in just 61.54 seconds.
- Australia's single largest pizza delivery occurred on 5 April 2007 in Adelaide when Domino's delivered 2,117 Hawaiian, Supreme and Vegorama pizzas to hungry workers at a local Holden factory.
- Pizza lovers across Australia raised almost \$120,000 for Australian Red Cross in a single weekend by ordering pizza from their local Domino's. During the Domino's Red Dot Weekend, \$1 from every order taken was donated to Australian Red Cross.
- Domino's was the first Australian pizza chain to enable its customers nationally to order online. The internet ordering capability also features an Anticipation Clock which gives customers a live update on the progress of their pizza.