



Strategic
Investment
Opportunity

The Broken Market & Our Opportunity



Corporate food services are fragmented, manual, and ripe for disruption.

The Pain Points



Billing Chaos

Companies manage dozens of invoices from different restaurants manually.



Limited Variety

Employees get bored with repetitive meal options from single vendors.



Quality Control

No centralized vetting process for hygiene and reliability.

The Market Opportunity

15 Billion SAR

Total Addressable Market (TAM) in KSA

50,000+

Corporate Companies in Target Cities

TAM 15B

Total Market

SAM 3B

Serviceable

SOM 300M

Target Share

The Strategic Pivot: B2C vs. B2B



Why we shifted focus to where the real value lies.

Old Model (B2C)

Avg. Order Value	152 SAR
Retention (3mo)	30%
LTV	600 SAR
Net Margin	-20% (Loss)
CAC	High



New Model (B2B)

Avg. Order Value	3,449 SAR
Retention (Annual)	85% +
LTV	124,000 SAR
Net Margin Potential	56% - 68%
Revenue Stability	

22x Value Unlock



Scalable Platform Economics



High-margin revenue streams driven by superior unit economics.

📈 Commission (Primary)

15% take rate on every order. Industry standard, competitive with aggregators.

🔄 Subscriptions (Future)

Recurring revenue from premium features for corporate clients (analytics, priority).

👑 Value-Added Services

High-margin upsells: Nutrition consulting, white-label solutions.

↑ Low Marginal Cost

🧩 Network Effects

⚙️ Operational Leverage

Unit Economics (Per Client)

Avg. Monthly GMV	90,000 SAR
Our Revenue (15%)	13,500 SAR/mo
Annual Revenue	162,000 SAR
CAC	450 SAR
Payback Period	< 1 Month

275x

LTV / CAC Ratio



Why We Win: The B2B Infrastructure Moat



Building barriers to entry through quality, technology, and relationships.



Curated Kitchen Network

We prioritize **Quality over Quantity**. Vetted, certified kitchens ensure reliability and hygiene, unlike open marketplaces.



Corporate-Grade Tech

Built for B2B: Multi-user dashboards, automated invoicing, and AI-driven menu planning that saves companies **10+ hours/month**.



First-Mover Advantage

Established relationships with **38 companies** while competitors are still fighting for low-margin B2C users.



Founder-Market Fit

15+ years combined experience in F&B and Enterprise SaaS. We understand the pain points of both kitchens and corporates.

Company Valuation Methodologies

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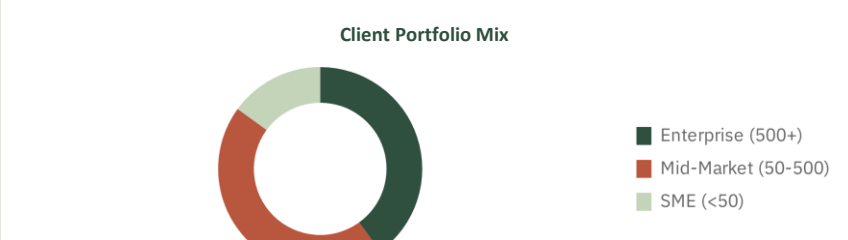
Our Infrastructure-First approach creates a defensible position in the market.

Early Traction & Validation



Strong momentum since pivoting to B2B platform model.

50% MoM Growth Last 3 Months Average	38 Active B2B Clients 78% of Total Revenue	95% Retention Rate Sticky Annual Contracts
381K Total GMV (SAR) Nov 2024 - Jan 2026	73.6K Jan '26 GMV (SAR) Record Monthly High	162K Avg. Contract Value Per Client / Year



Geographic Presence	
Riyadh (HQ)	95%
Qassem	5%
Dammam	0%

2026: Path to Profitability



Clear trajectory to break-even in May 2026 and profitability thereafter.

Total GMV 2026

7.45M SAR

Conservative Target

Revenue (15%)

1.12M SAR

Platform Fees

Net Income

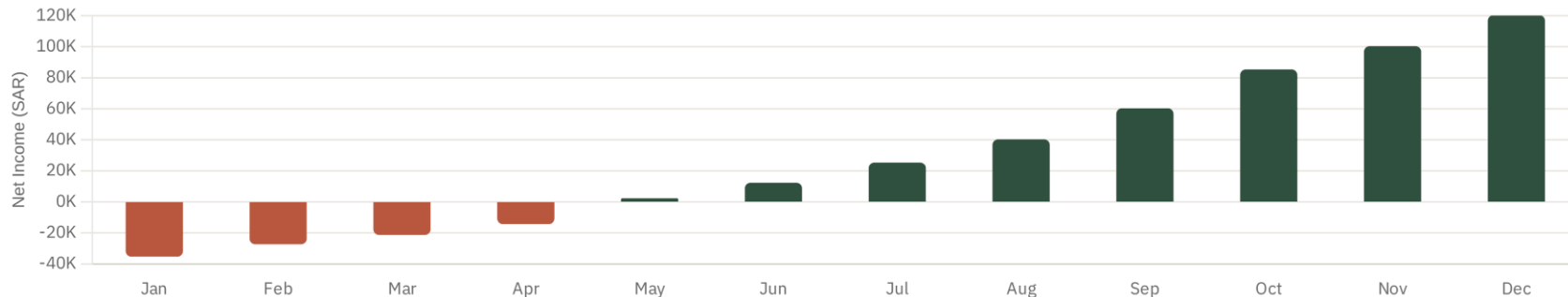
634K SAR

Full Year Profit

Break-Even

May 2026

Month 5



Assumption 1: 8 new B2B clients acquired per month

Assumption 2: 5% Annual Churn Rate

Assumption 3: 10% MoM GMV growth per client

2027: High-Margin Growth



Operational leverage drives 56% Net Margins as tech scales.

Total GMV

33.1M

SAR (+344% YoY)

Revenue

4.96M

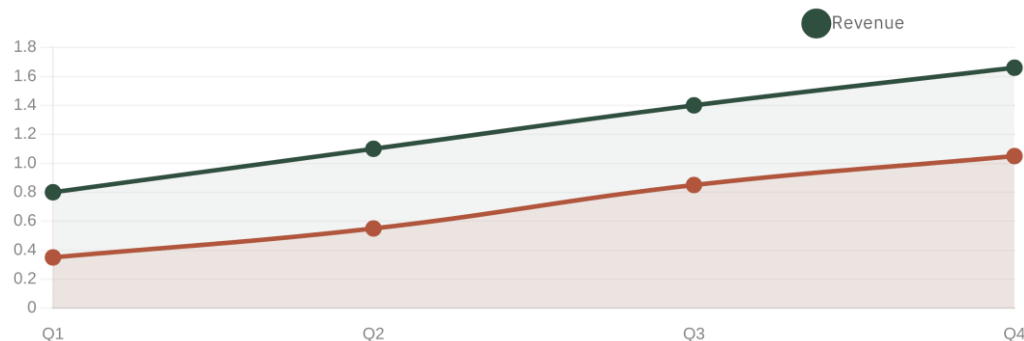
SAR (15% Take Rate)

Net Income

2.80M

SAR (56.5% Margin)

Revenue vs. Net Income Trajectory (SAR Millions)



Fixed Costs Stabilize

Platform architecture allows scaling 3x volume without proportional cost increase.

AI Automation

Automated matching & logistics dispatch reduces manual operations by 60%.

2028: Scale-Up & Market Leadership



The inflection point: 68% Net Margins and 8.2M SAR Profit.

Total GMV

80.3M SAR

+142% YoY Growth

Revenue

12.0M SAR

Platform Fees + Subs

Net Income

8.2M SAR

Pure Profit

Net Margin

68.4%

SaaS-like Economics

Growth Drivers



Market Leadership

Capturing 5% market share in target cities with 385 active B2B clients.



Premium Subscriptions

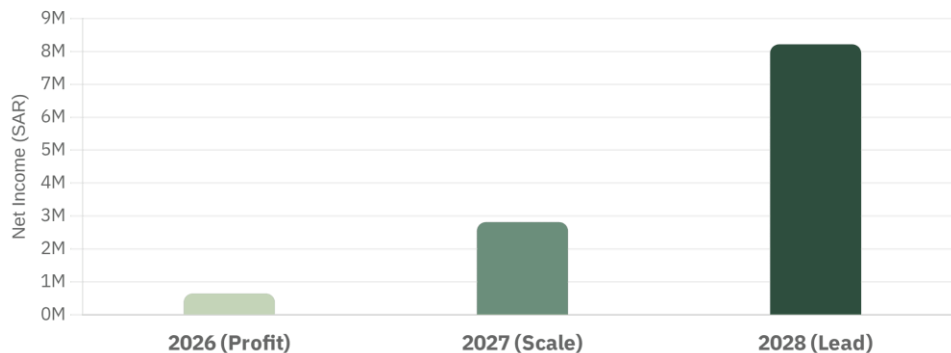
Launching 'Cloud Chefs Pro' adds 10% recurring revenue to the top line.



Regional Expansion

Entering 3 new cities: Mecca, Medina, and Khobar.

Net Income Trajectory (3-Year Outlook)



Valuation: Fair & Conservative



A weighted average approach grounded in realistic multiples.

Methodology	Result	Weight	Weighted Value
Revenue Multiple 1.7x on 2027 Revenue (4.96M)	8.5M SAR	30%	2.5M SAR
EBITDA Multiple 3.2x on 2027 EBITDA (2.9M)	9.2M SAR	30%	2.8M SAR
DCF (3-Year) NPV of 2026-2028 Cash Flows	11.8M SAR	40%	4.7M SAR
Total Weighted Valuation		100%	10.0M SAR

Why Conservative?

- Revenue Multiple (1.7x): Well below industry average to account for pre-scale stage.

Comparables

- Kitopi: ~3x Revenue • Mumzworld: ~2.5x Revenue • Cloud Chefs: asking 1.7x forward revenue.

Pre-Money Valuation

10,000,000 SAR

The Ask: Fueling the Next Phase



Investment required to scale technology and capture market share.

Investment Ask

3.0M SAR

Post-Seed Round

Equity Offered

23%

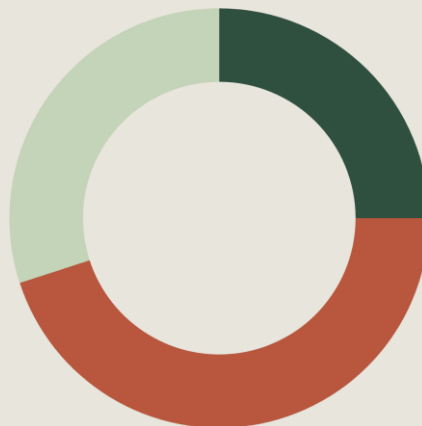
Preferred Shares

Valuation

10.0M SAR

Pre-Money Valuation

Use of Funds Allocation



● Technology & Product (25%)

AI demand forecasting, Employee App, Enterprise Integrations (SAP/Oracle).

● Sales & Expansion (45%)

B2B Sales Team, Marketing, Expansion to Jeddah & Dammam.

● Operations (30%)

Key Hires (COO), Customer Success, Kitchen Network Growth.



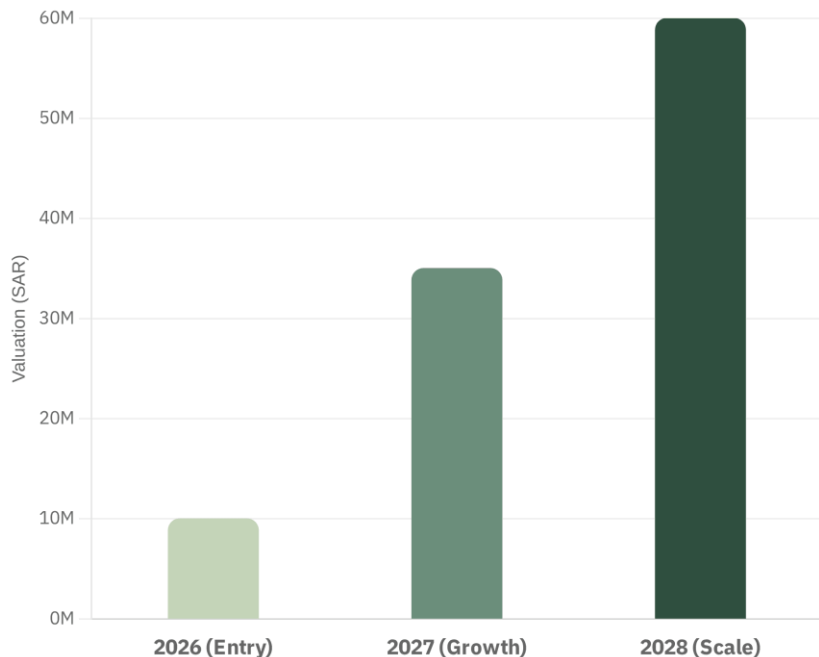
18-Month Runway: Sufficient capital to reach profitability (May 2026) and scale to 100+ clients. Includes 2-month contingency buffer.

ROI & Exit Strategy



Clear path to liquidity with 3-5x potential returns by 2028.

Projected Valuation Growth (SAR)



Primary Path



Strategic Acquisition

Acquisition by major food aggregators or logistics players looking to enter the B2B corporate catering market.

Jahez

HungerStation

LogiPoint

Sustainable Income



Dividend Distribution

Generating consistent cash flow for investors through profit sharing, targeting 60-70% payout ratio from 2028 onwards.

Target: 2028

Yield: 15-20%

Partner with Cloud Chefs



Seize the opportunity to redefine corporate catering in KSA.



Proven B2B Model

High retention, recurring revenue, and strong unit economics.



Clear Path to Profitability

Break-even by May 2026 with disciplined growth.



Scalable Technology

AI-driven platform ready for multi-city expansion.



Attractive Valuation

Entering at 10M SAR valuation with 3-5x potential ROI.

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Let's discuss the future of food.