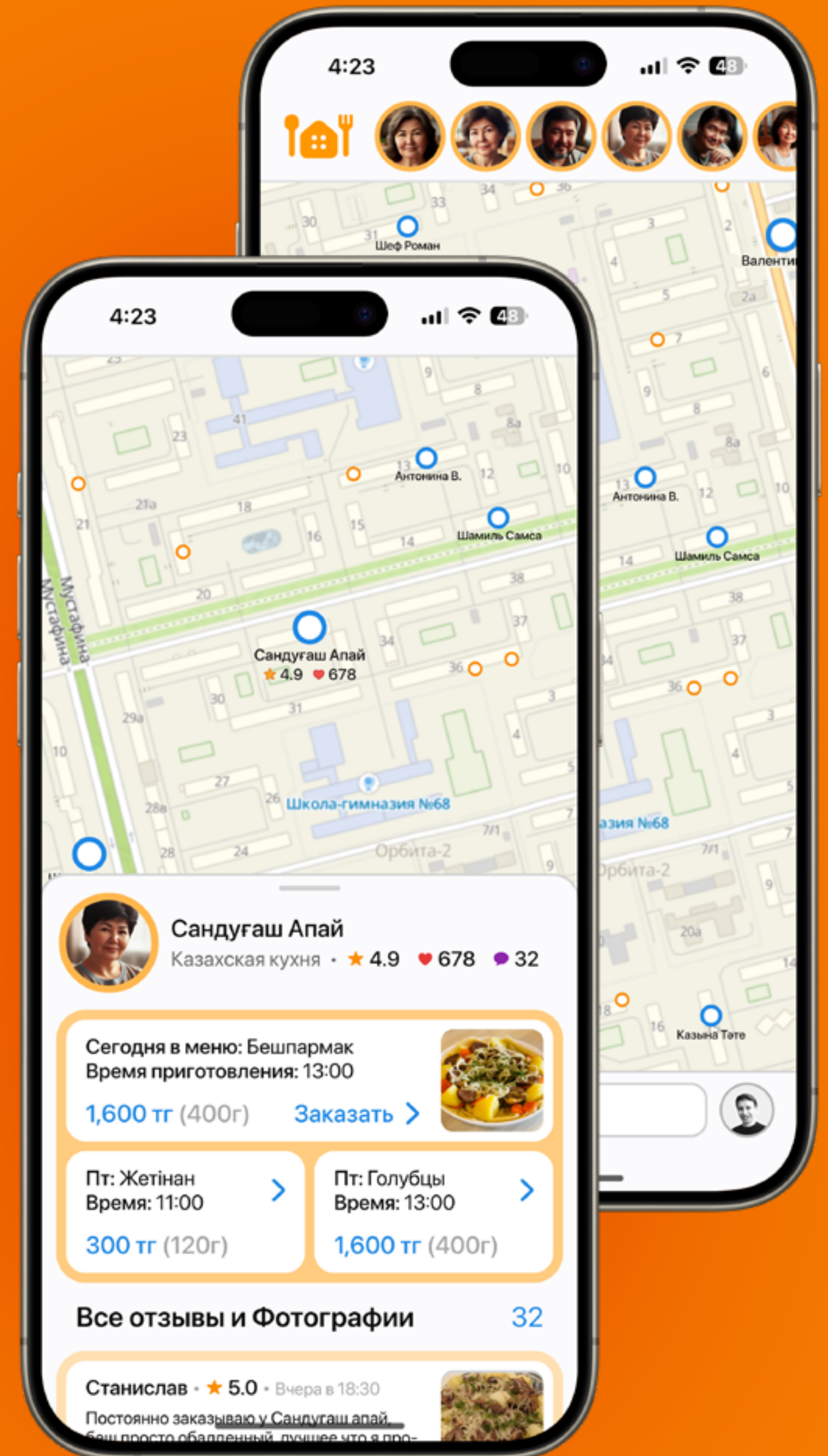


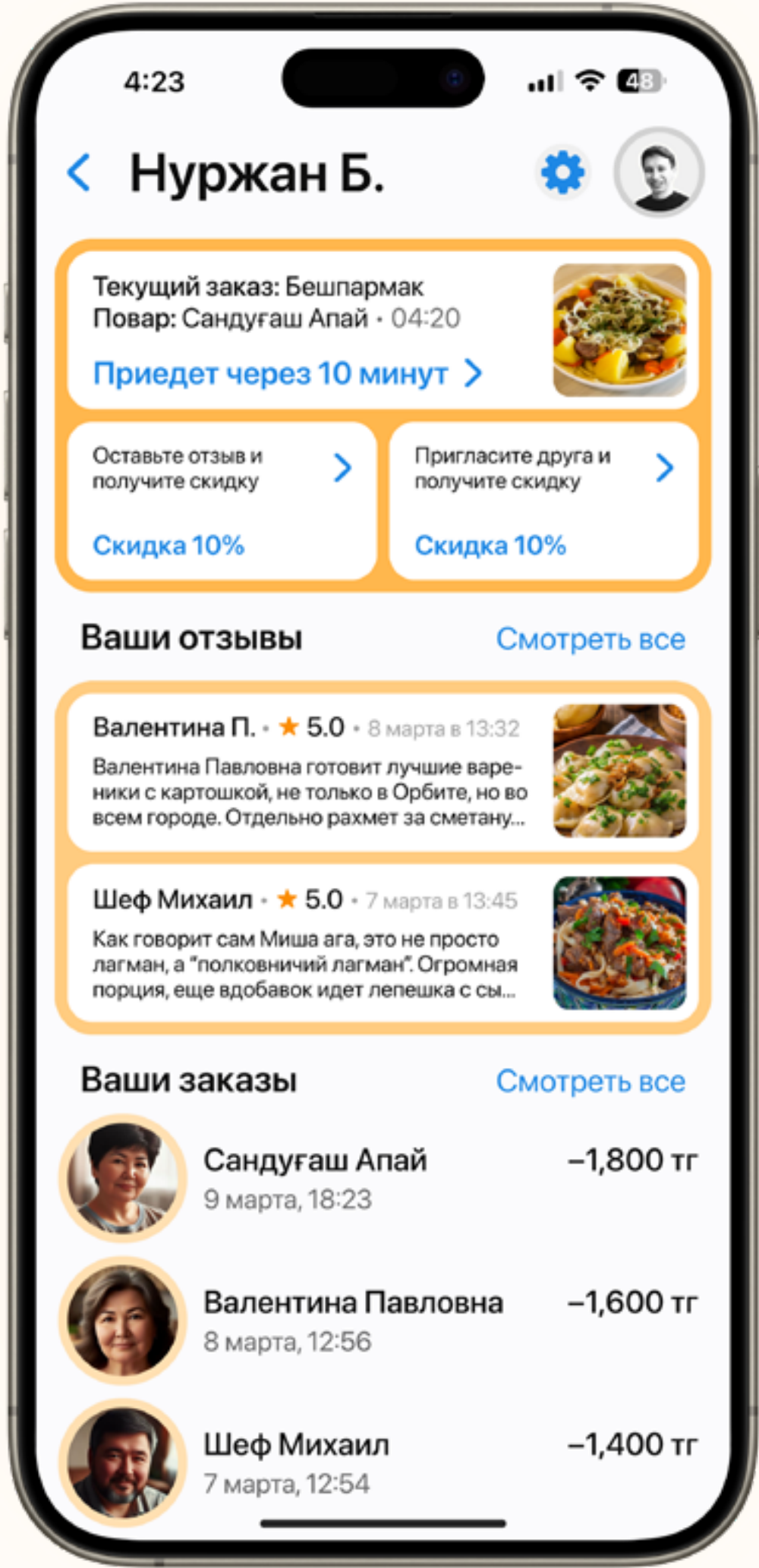
Where tamaq is always daiyn





For users

Experience
homemade food
for a good price



For home cooks

Prepare food
at home and sell
like a restaurant

Marketplace



Overall competitive landscape

	Full-service venues	Self-service venues	Canteens, Kiosks	Supermarkets, Grocery shops	Vending machines	Individuals
Red Ocean	<ul style="list-style-type: none">• Restaurants• Cafes• Full-service cafeterias	<ul style="list-style-type: none">• Fast food chains (KFC, Burger King, Popeyes, Degirmen, Dodo Pizza, etc)• Coffee shops (Kulikov, Starbucks, Urbo, Vanilla, etc)	<ul style="list-style-type: none">• Cafeterias in offices, schools, and universities• Doner & samsa kiosks (Mangal, etc)	<ul style="list-style-type: none">• Galmart• Magnum• Small• Toimart• Grocery shops• Fuel station shops	<ul style="list-style-type: none">• Vending machines in schools, offices, and universities	
Technology intermediaries	<ul style="list-style-type: none">• abr +• Glovo• Wolt• Yandex Еда	<ul style="list-style-type: none">• abr +• Glovo• Wolt• Yandex Еда		<ul style="list-style-type: none">• Airba Fresh• Arbuz• Choco Рядом• Magnum (Kaspi)• Yandex Лавка		
Blue Ocean						<ul style="list-style-type: none">• Home cooks
Technology intermediaries						<ul style="list-style-type: none">• Tamaq• Domfood• Yandex Еда (?)

Direct competitors

	Tamaq	Domfood	Yandex Еда (?)
Location	Almaty	Almaty	Almaty
Start Date	September 2025	September 2024	Potential future
1) Admissions for cooks	<ul style="list-style-type: none">• In person• Special admission team• We help with docs	<ul style="list-style-type: none">• Online — in the app• No help with docs	<ul style="list-style-type: none">• Online — in the app• No help with docs
2) Short training for cooks	<p>We explain:</p> <ul style="list-style-type: none">• sanitary norms• cooks have responsibility• good quality is good income	<ul style="list-style-type: none">• No training	<ul style="list-style-type: none">• No training
3) Nike strategy	<ul style="list-style-type: none">• Cooks can post <i>stories</i>• Cooks can become <i>popular</i>• We sign partnerships with popular cooks & remove commission	<ul style="list-style-type: none">• No <i>stories</i>, no audience engagement• No partnerships with popular cooks, always commission	<ul style="list-style-type: none">• No <i>stories</i>, no audience engagement• No partnerships with popular cooks, always commission

Cooks



534 000
TAM

21 300
SAM ~ 4% TAM

4 200
SOM ~ 20% SAM

Daily active cooks

Target users



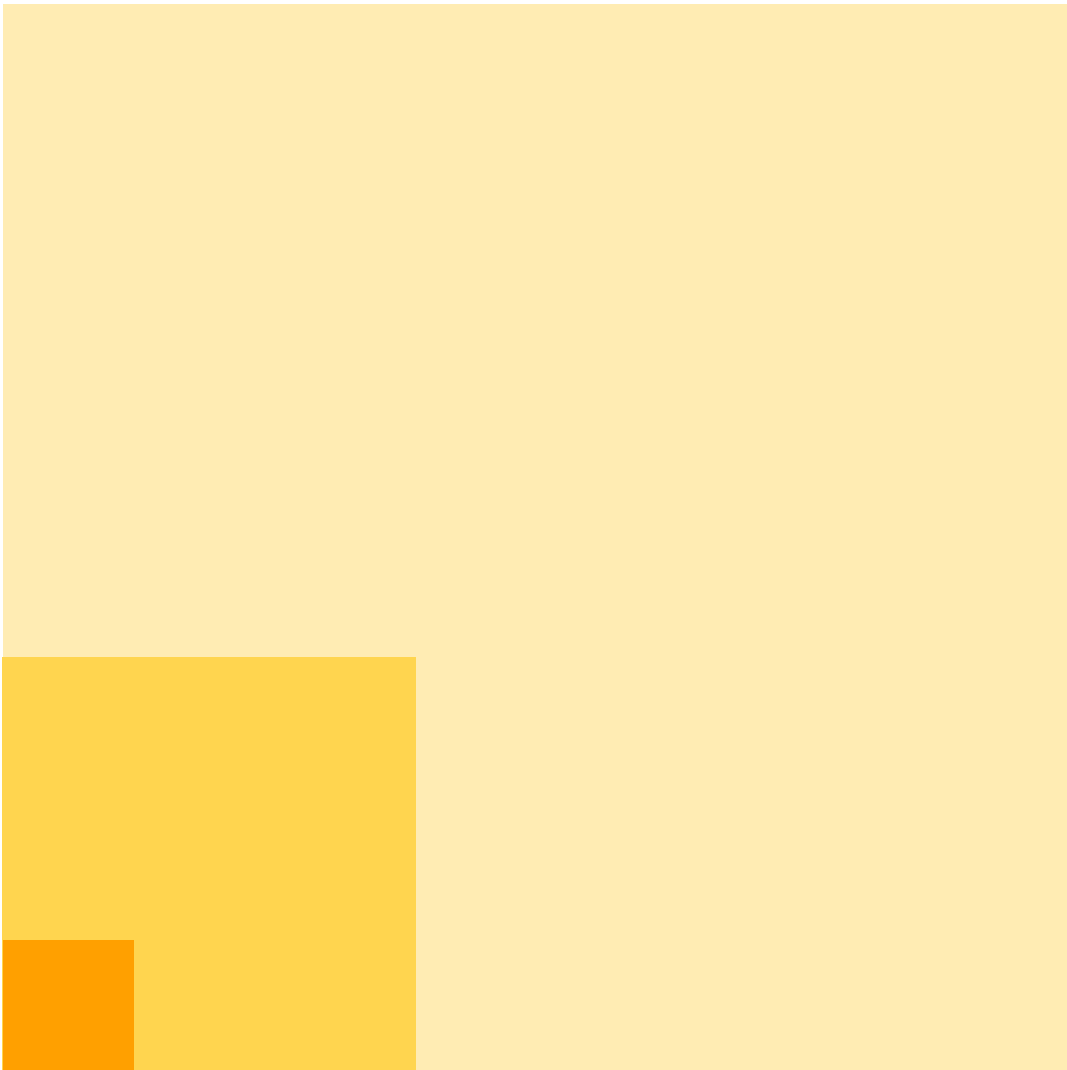
373 000
TAM

74 700
SAM ~ 20% TAM

14 900
SOM ~ 20% SAM

Daily active users

Food service industry



561 000 M
TAM (in KZT)

84 200 M
SAM ~ 15% TAM (in KZT)

8 400 M
SOM ~ 10% SAM (in KZT)

Potential annual sales

Retail sales of food products



838 000 M
TAM (in KZT)

83 800 M
SAM ~ 10% TAM (in KZT)

8 400 M
SOM ~ 10% SAM (in KZT)



2025

Q3

Q4

2026

Q1

Q2

Q3

Q4

2027

Q1

Q2

We start testing the service in July 2025

We start in Almaty in September, targeting 20 university dormitories & all business centers

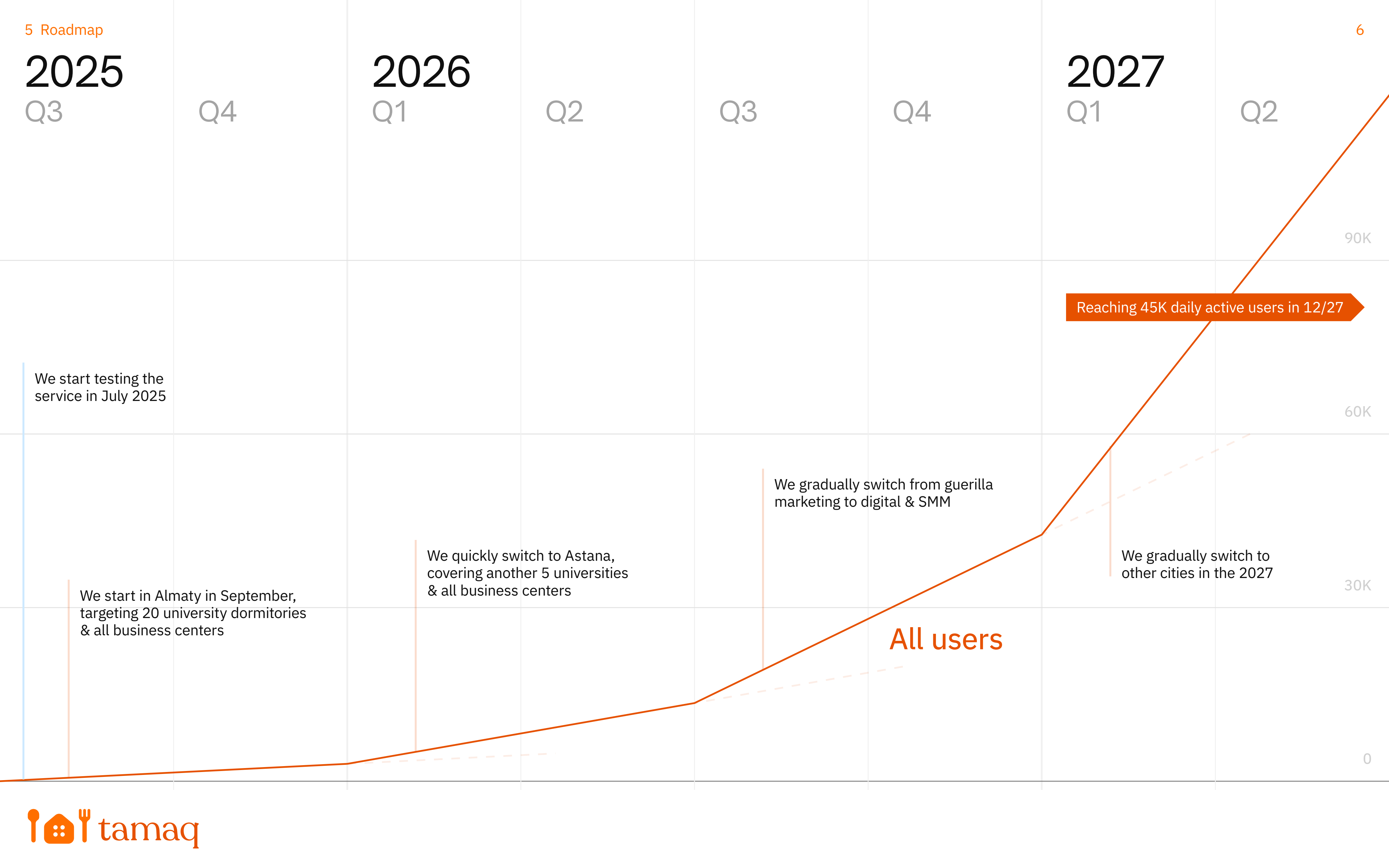
We quickly switch to Astana, covering another 5 universities & all business centers

We gradually switch from guerilla marketing to digital & SMM

We gradually switch to other cities in the 2027

Reaching 45K daily active users in 12/27

All users



2025

Q2

Q3

Q4

2026

Q1

Q2

Q3

System

Developing & Testing
3 months

Fundraising

Collecting data & improving
5 months

It's highly important to release
in August-September

Testing for scale
3 months

It's important to test before
scaling to other cities

Collecting data & improving

Almaty

Guerilla Marketing at dorms & BCs *
6 months

We talk with real users,
we gain real trust

We'll need 6 months to cover 20
universities & all business centers

Refocus to SMM & Digital Marketing

At this point we'll cover all target users
& refocus to traditional mass marketing

Astana

* Our strategic know-how is real-world
guerilla marketing at dorms & business
centers — where our target users.

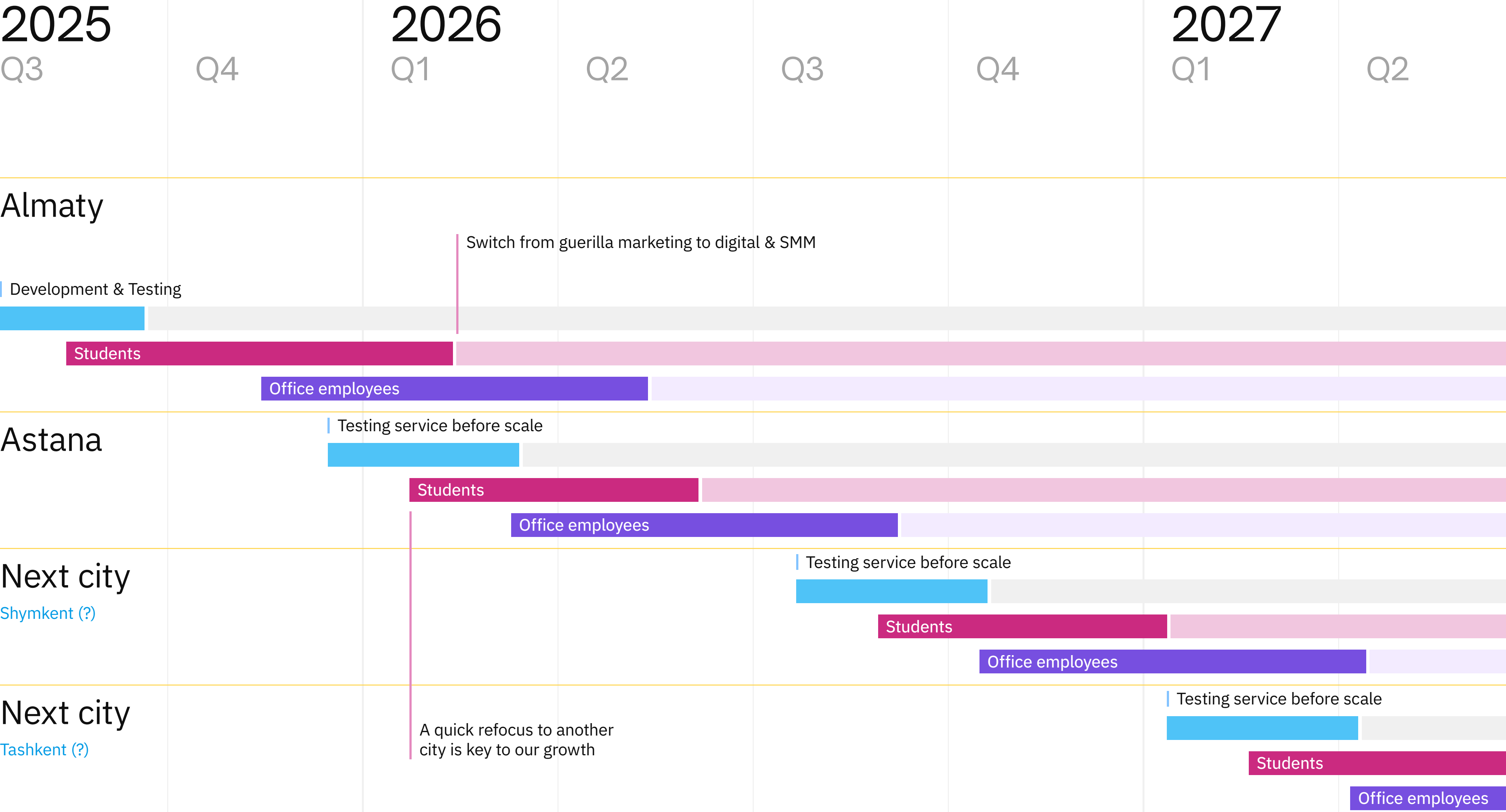
We leverage the density of locations &
word-of-mouth — achieving unmatched
network effects!

Guerilla Marketing
4 months

We'll need 4 months to cover 5
universities & all BCs in Astana

Refocus to SMM & Digital Marketing

At this point we'll cover all target users
& refocus to traditional mass marketing



2025

Q3

Q4

2026

Q1

Q2

Q3

Q4

2027

Q1

Q2

PRODUCT-MARKET FIT

GROWTH

Reaching KZT 1 Billion valuation in 2.5y

Almaty
Pre-seed KZT 35M ~ \$ 70K

By the end of 2027
Sales revenue ~ KZT 1,125 M
Net income ~ KZT 503 M

Astana

Sales revenue ~ KZT 124 M
Net income ~ KZT 16 M

Next city
Shymkent (?)

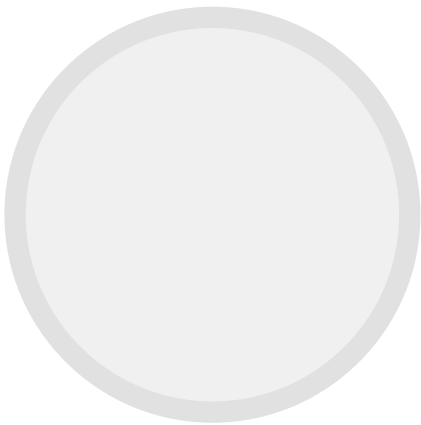
Sales revenue ~ KZT 403 M
Net income ~ KZT 127 M

Next city
Tashkent (?)

Sales revenue ~ KZT 476 M
Net income ~ KZT 215 M

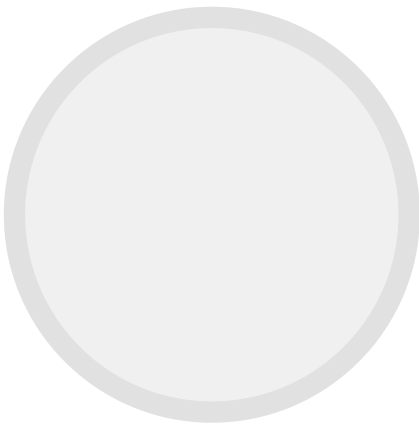


Advisors



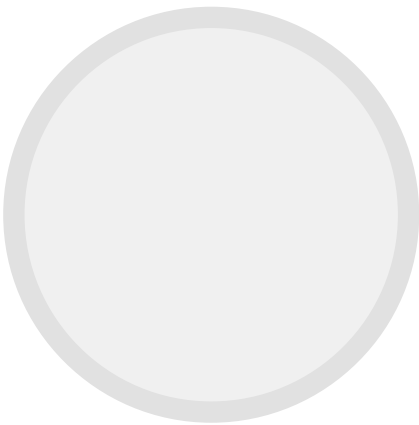
Name

Position
@ Company



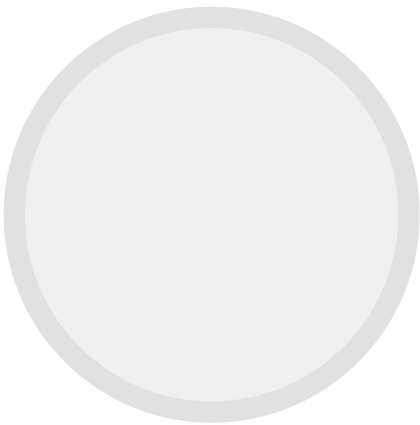
Name

Position
@ Company



Name

Position
@ Company



Name

Position
@ Company

Team



Nurzhan

Development & Design,
Marketing & Growth

Management @ KIMEP,
NURIS Incubator Alumni



Begimai

Users & Cooks Community,
Admissions & Support

Management @ KIMEP ,
KIMEP Dormitory Supervisor

