

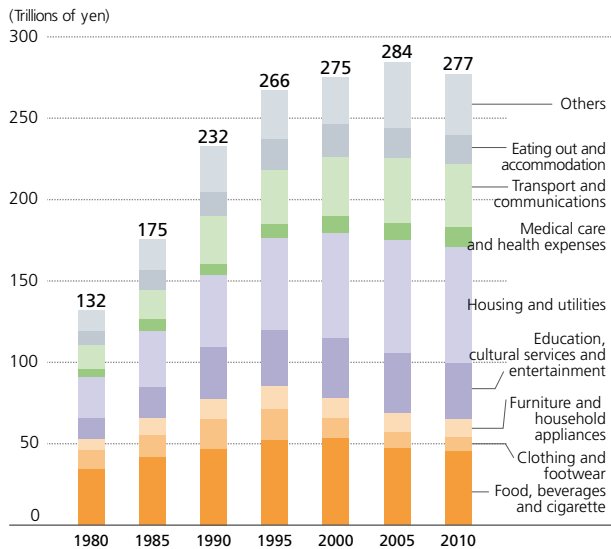
# The Consumer Environment

## YEAR-ON-YEAR COMPARISON OF ECONOMIC INDICES OVER FOUR QUARTERS



Source: National Accounts (Economic and Social Research Institute, Cabinet Office), Consumer Price Index (Ministry of Internal Affairs and Communications), Monthly Labour Survey (Ministry of Health, Labour and Welfare)

## DOMESTIC FINAL CONSUMPTION EXPENDITURE OF HOUSEHOLD



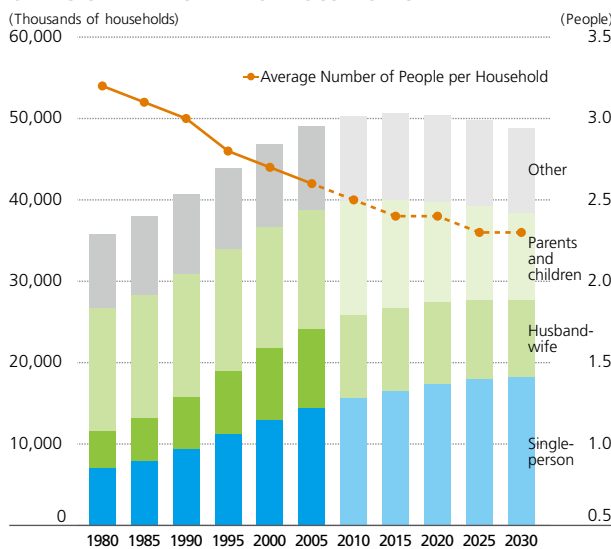
Source: National Accounts (Economic and Social Research Institute, Cabinet Office)  
Note: The figures before 2000 are based on old standard.

## THE NUMBER OF FEMALE WORKERS AND THEIR EMPLOYMENT RATE



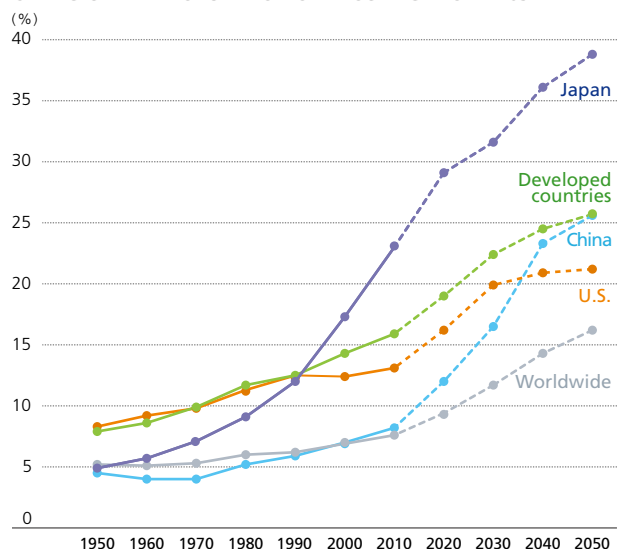
Source: Labour Force Survey (Ministry of Internal Affairs and Communications)

## CHANGES IN THE NUMBER OF HOUSEHOLDS



Source: National Institute of Population and Social Security Research

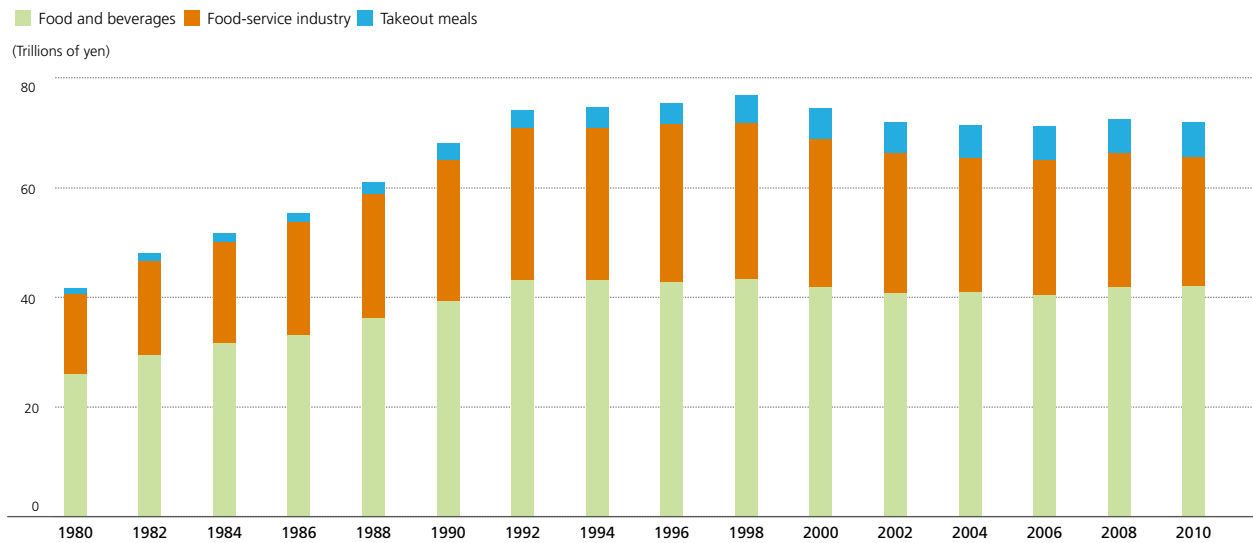
## CHANGES IN THE POPULATION OF THOSE AGED OVER 65



Source: Statistical Handbook of the World (Ministry of Internal Affairs and Communications)

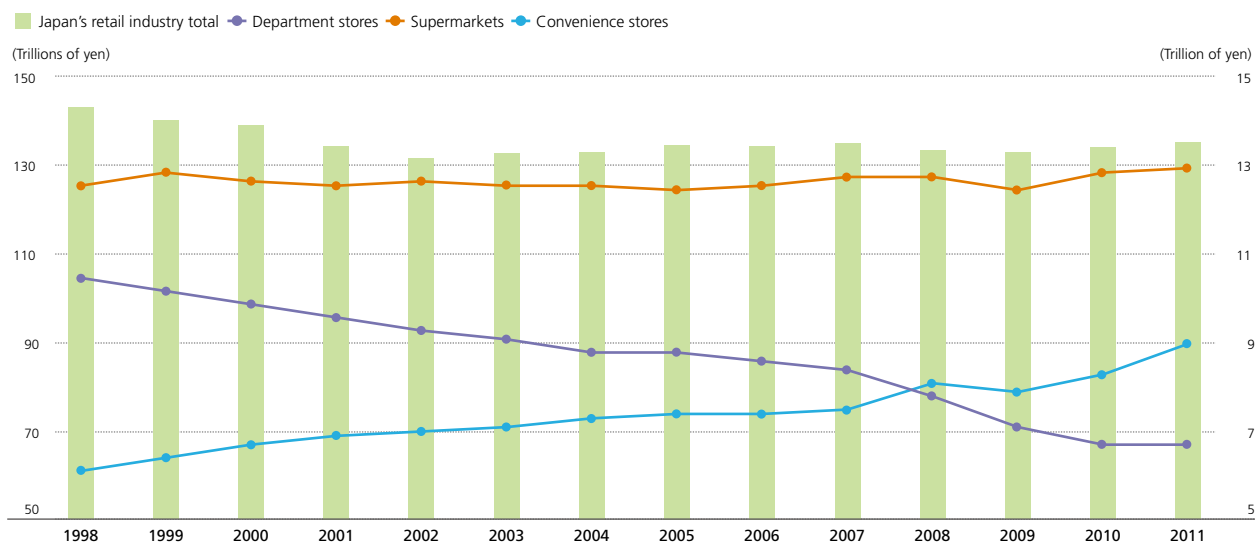
# Environment of Retail Industry

## TRENDS IN THE SCALE OF THE FOOD MARKET



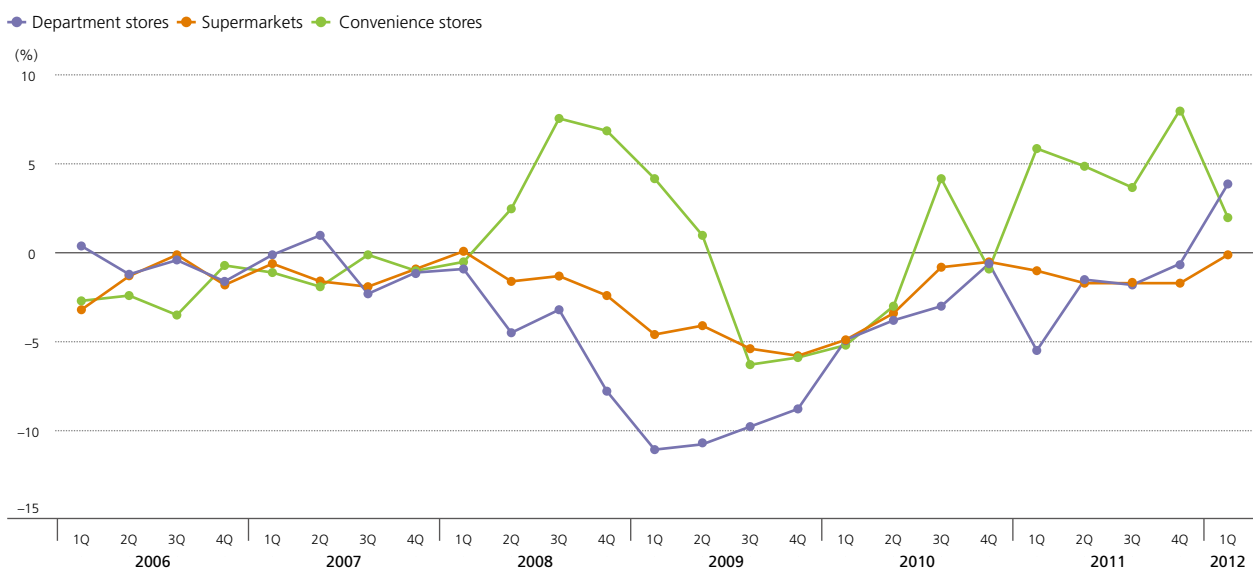
Source: Current Survey of Commerce (Ministry of Economy, Trade and Industry), Foodservice Industry Research Institute

## YEAR-ON-YEAR COMPARISON OF MAJOR STORE FORMATS OVER FOUR QUARTERS



Source: Current Survey of Commerce (Ministry of Economy, Trade and Industry)

## YEAR-ON-YEAR COMPARISON OF MAJOR STORE FORMATS OVER FOUR QUARTERS



Source: Current Survey of Commerce (Ministry of Economy, Trade and Industry)

Profile

Performance Overview

Retailers in the World

Domestic Retail Environment

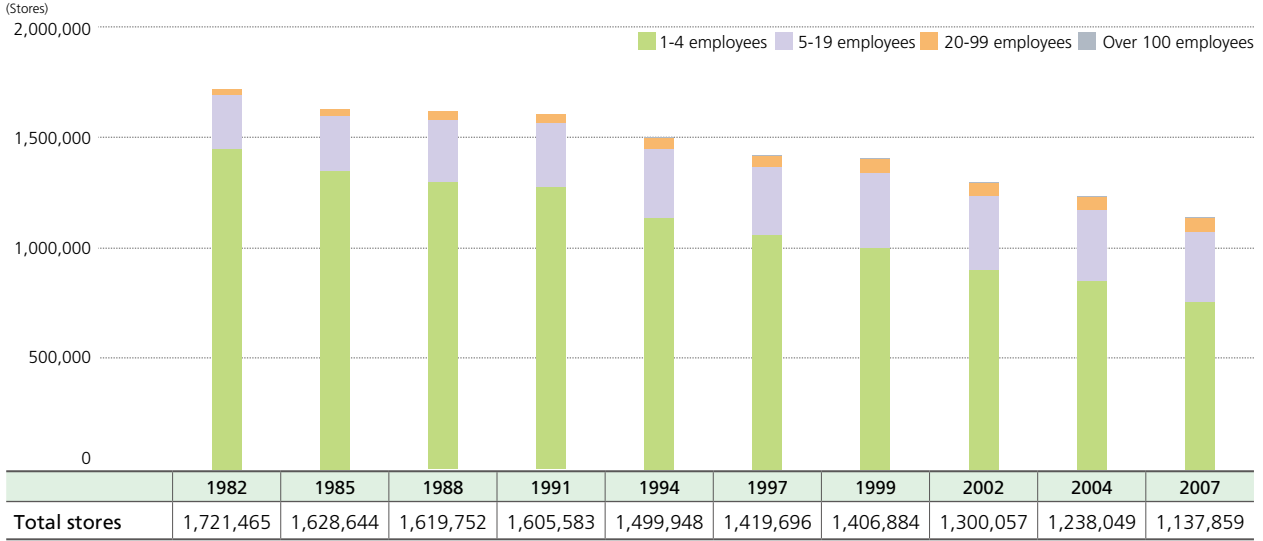
Group Business Strategy

Major Group Companies' Data

Corporate Data

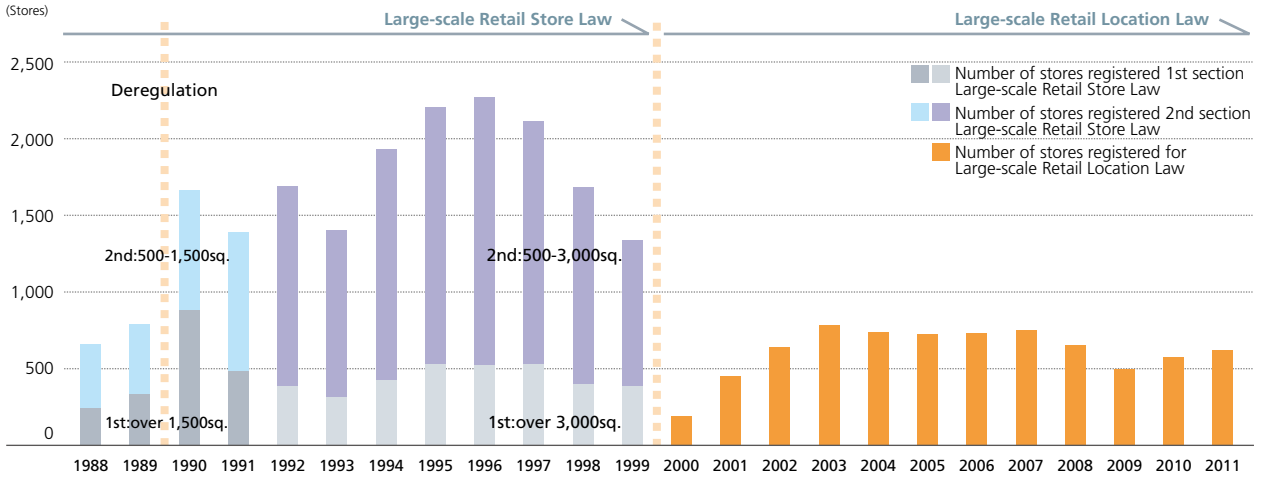
# Environment of Retail Industry

TREND IN NUMBER OF STORES BY STRATUM OF NUMBER OF EMPLOYEES



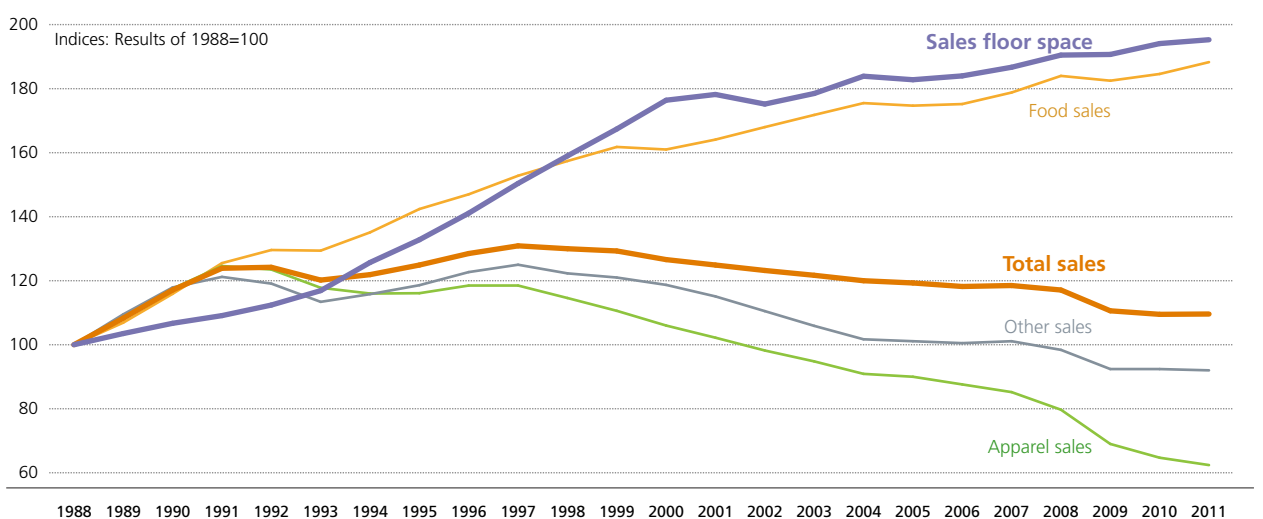
Source: The Census of Commerce (Ministry of Economy, Trade and Industry)

TREND IN NUMBER OF REGISTERED LARGE-SCALE RETAIL STORES



Source: Ministry of Economy, Trade and Industry

TREND IN SALES AND SALES FLOOR SPACE OF LARGE-SCALE RETAIL STORES



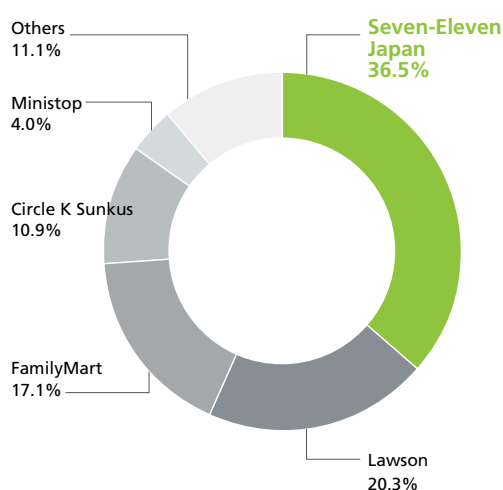
Source: Annual Report on the Current Survey of Commerce (Ministry of Economy, Trade and Industry)

# Major Group Companies' Market Share in Japan (Nonconsolidated)

## IN THE TOP 5 FOR TOTAL STORE SALES AT CONVENIENCE STORES

	FY2012 (Billion ¥)	Share (%)
Convenience stores total market	8,975.8	100.0
<b>1 Seven-Eleven Japan</b>	<b>3,280.5</b>	<b>36.5</b>
2 Lawson	1,825.2	20.3
3 FamilyMart	1,534.6	17.1
4 Circle K Sunkus	979.8	10.9
5 Ministop	355.5	4.0
Others	1,000.0	11.1
<b>Top 5 Combined</b>	<b>7,975.7</b>	<b>88.9</b>

Note: Total store sales of Lawson and Circle K Sunkus represent the simplified sum of their subsidiaries of domestic convenience stores.



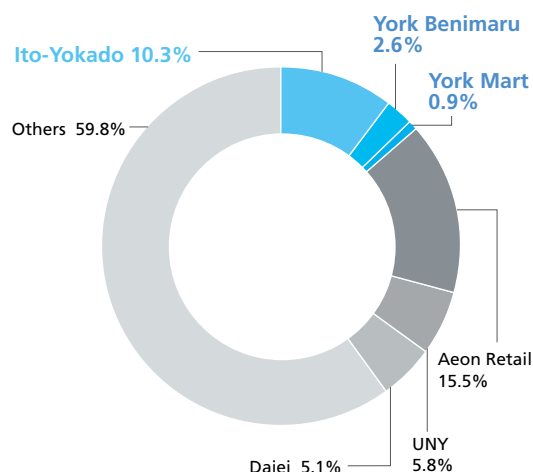
Profile

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Retailers in the World

## IN THE TOP 4 FOR NET SALES AT SUPERSTORES

	FY2012 (Billion ¥)	Share (%)
Superstores total market	12,977.7	100.0
1 Aeon Retail	2,017.3	15.5
<b>2 Ito-Yokado</b>	<b>1,334.2</b>	<b>10.3</b>
3 UNY	750.1	5.8
4 Daiei	656.9	5.1
Others	8,219.0	63.3
<b>Top 4 Combined</b>	<b>4,758.7</b>	<b>36.7</b>
<b>York-Benimaru</b>	<b>342.9</b>	<b>2.6</b>
<b>York Mart</b>	<b>118.4</b>	<b>0.9</b>



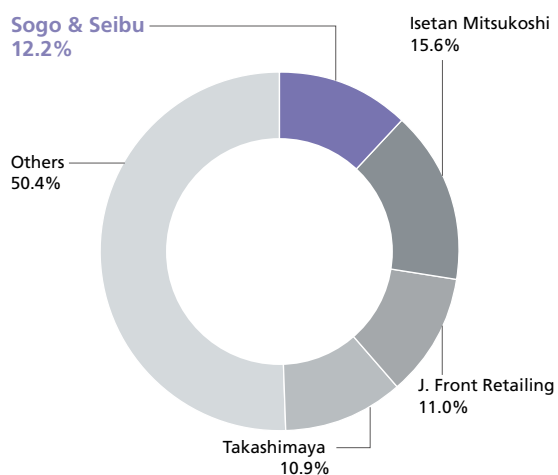
Domestic Retail Environment

Group Business Strategy

Major Group Companies' Data

## IN THE TOP 4 FOR NET SALES AT DEPARTMENT STORES

	FY2012 (Billion ¥)	Share (%)
Department stores total market	6,723.0	100.0
1 Isetan Mitsukoshi	1,051.2	15.6
<b>2 Sogo &amp; Seibu</b>	<b>817.9</b>	<b>12.2</b>
3 J. Front Retailing	736.9	11.0
4 Takashimaya	729.7	10.9
Others	3,387.2	50.4
<b>Top 4 Combined</b>	<b>3,335.8</b>	<b>49.6</b>



Corporate Data

Note: Net sales of Isetan Mitsukoshi, J. Front Retailing and Takashimaya represent simplified sum of their subsidiaries of domestic department stores.

Sources: 1. Current Survey of Commerce (Ministry of Economy, Trade and Industry)  
2. Public information from each company