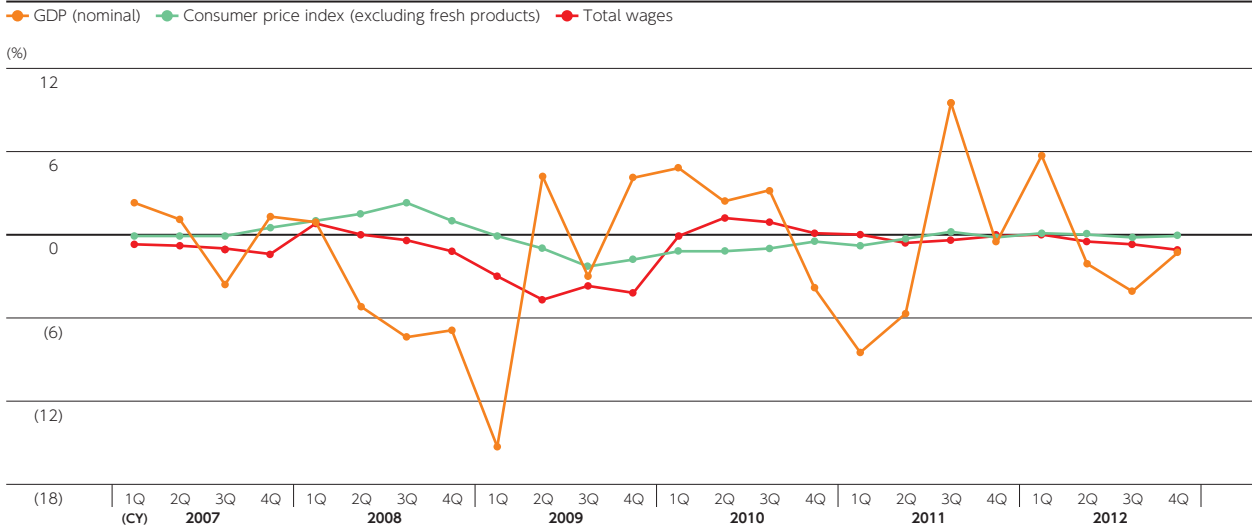


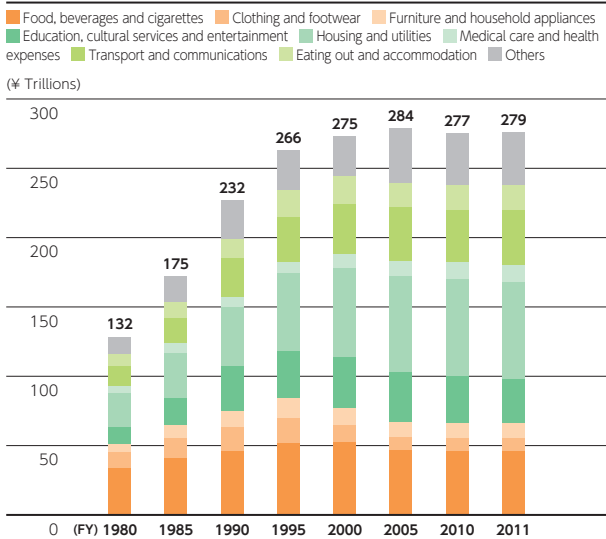
Consumer Environment

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



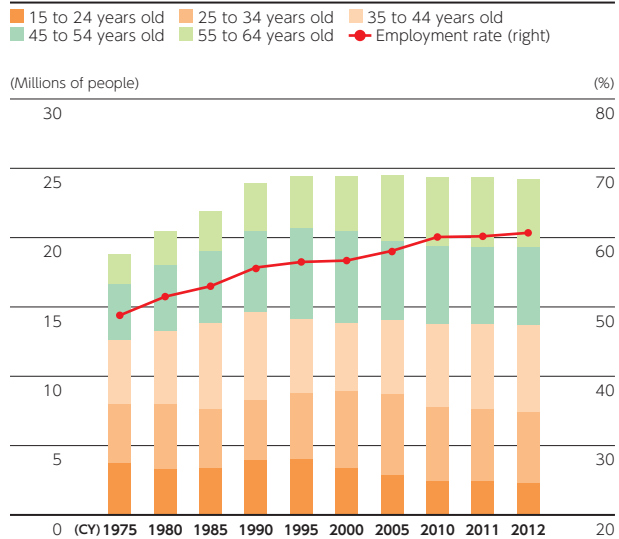
Source: National Accounts (Economic and Social Research Institute, Cabinet Office), Consumer Price Index (Ministry of Internal Affairs and Communications), Monthly Labour Survey (Ministry of Health, Labour and Welfare)

DOMESTIC FINAL CONSUMPTION EXPENDITURE OF HOUSEHOLD



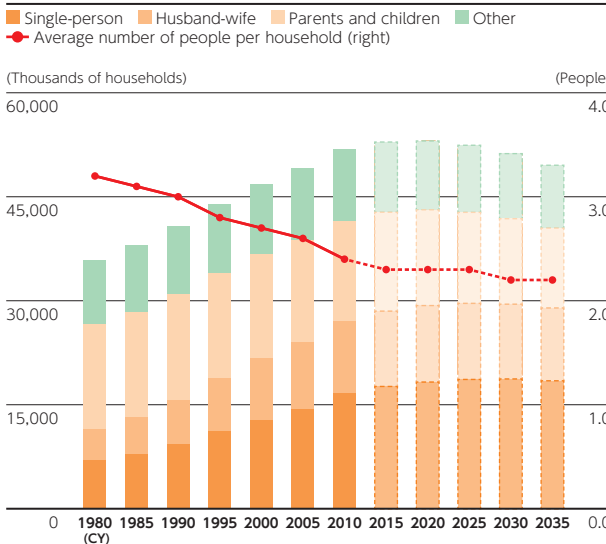
Source: National Accounts (Economic and Social Research Institute, Cabinet Office)
Note: The figures before 2000 are based on an old standard.

THE NUMBER OF FEMALE WORKERS AND THEIR EMPLOYMENT RATE



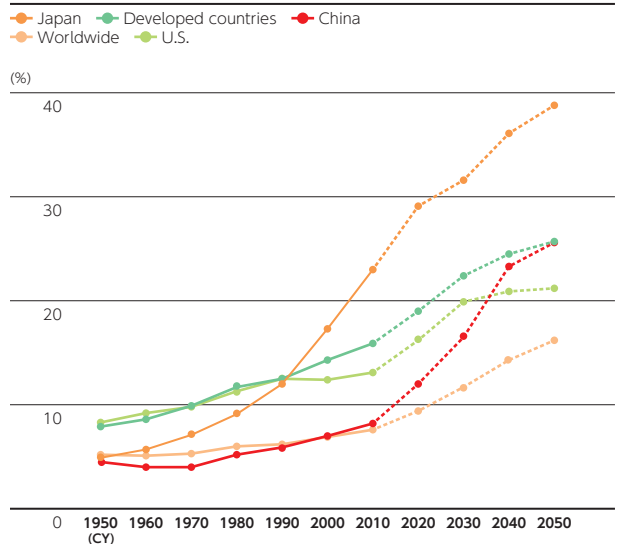
Source: Labour Force Survey (Ministry of Internal Affairs and Communications)

CHANGES IN THE NUMBER OF HOUSEHOLDS



Source: National Institute of Population and Social Security Research

CHANGES IN THE POPULATION OF THOSE AGED OVER 65



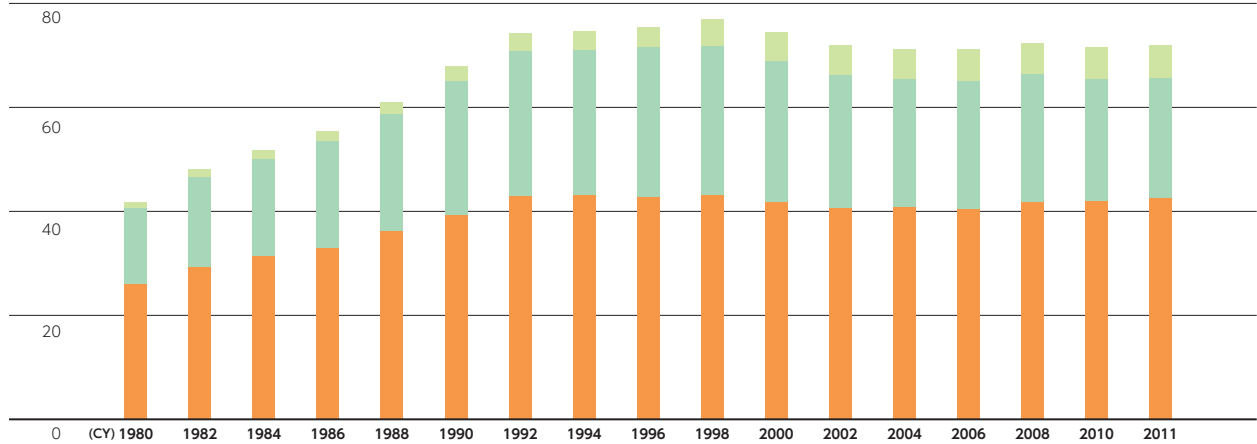
Source: Statistical Handbook of the World (Ministry of Internal Affairs and Communications)

Environment of Retail Industry

TRENDS IN THE SCALE OF THE FOOD MARKET

Food and beverages Food-service industry Takeout meals

(¥ Trillion)



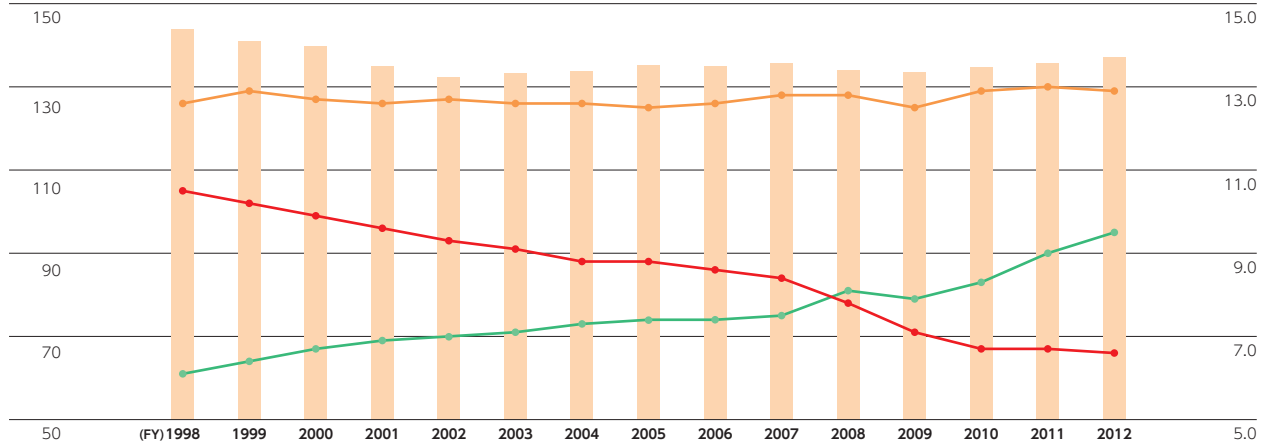
Source: Current Survey of Commerce (Ministry of Economy, Trade and Industry), Foodservice Industry Research Institute

TREND IN NET SALES AT MAJOR STORE FORMATS

Japan's retail industry total (left) Department stores (right) Supermarkets (right) Convenience stores (right)

(¥ Trillion)

(¥ Trillion)



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

YEAR-ON-YEAR COMPARISON OF EXISTING-STORE SALES AT MAJOR STORE FORMATS OVER FOUR QUARTERS

Department stores Supermarkets Convenience stores

(%)



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

Profile

Performance Overview

Global Retail Industry Data

Retail Environment in Japan

Group Business Strategy

Major Group Companies' Data

Corporate Data

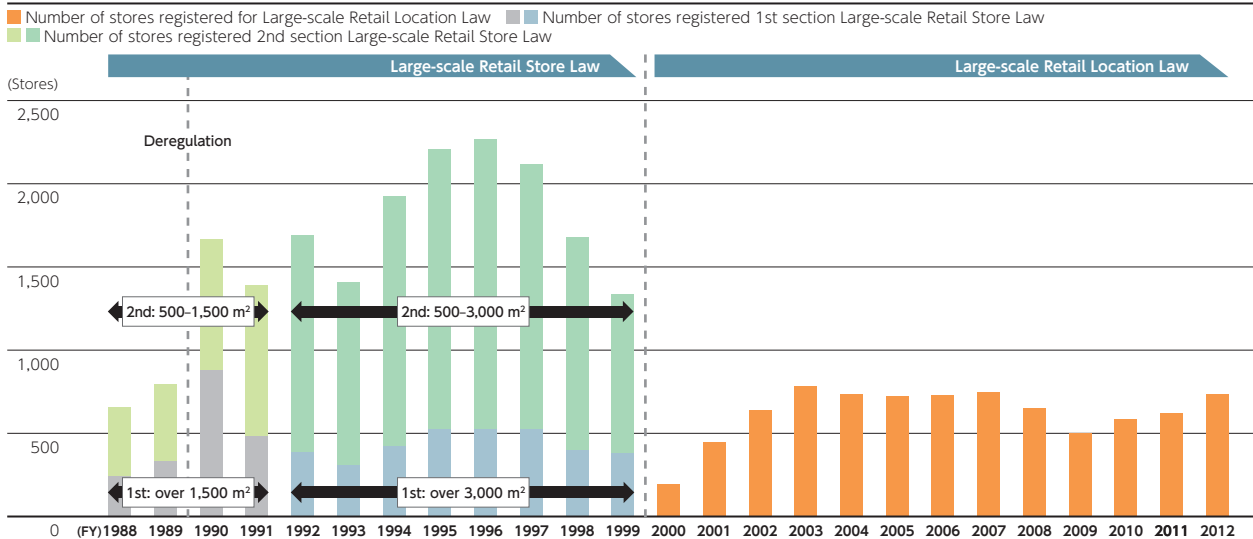
Environment of Retail Industry

TREND IN NUMBER OF STORES BY STRATUM OF NUMBER OF EMPLOYEES



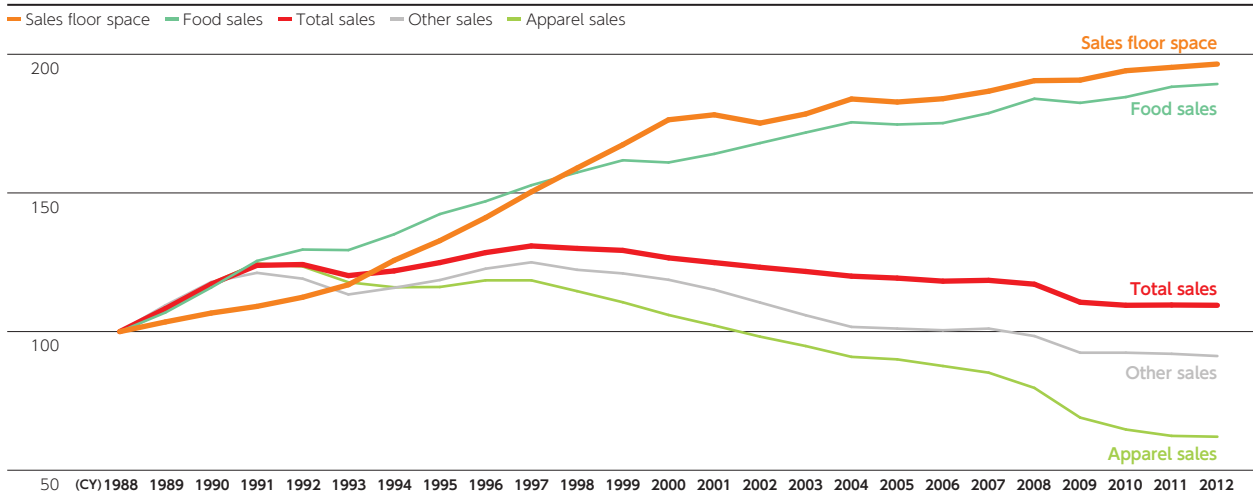
Source: The Census of Commerce (Ministry of Economy, Trade and Industry)

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 (Indices: Results of 1988=100)



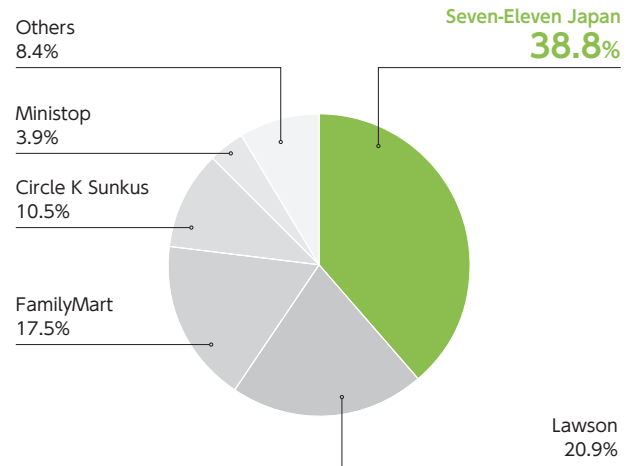
Source: Current Survey of Commerce (Ministry of Economy, Trade and Industry)

Major Group Companies' Market Share in Japan (Nonconsolidated)

AMONG TOP FIVE FOR TOTAL STORE SALES AT CONVENIENCE STORES

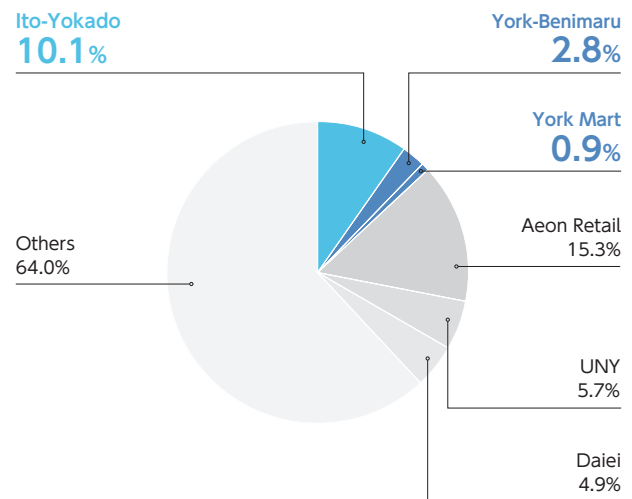
	FY2013 (¥ Billion)	Share (%)
Convenience stores total market	9,048.6	100.0
1 Seven-Eleven Japan	3,508.4	38.8
2 Lawson	1,894.6	20.9
3 FamilyMart	1,584.5	17.5
4 Circle K Sunkus	946.7	10.5
5 Ministop	352.6	3.9
Others	761.5	8.4
Top Five Combined	8,287.0	91.6

Note: Total store sales of Lawson and Circle K Sunkus represent the respective simple sums of the nonconsolidated net sales of each company and the net sales of its domestic convenience store subsidiaries.



AMONG TOP FOUR FOR NET SALES AT SUPERSTORES

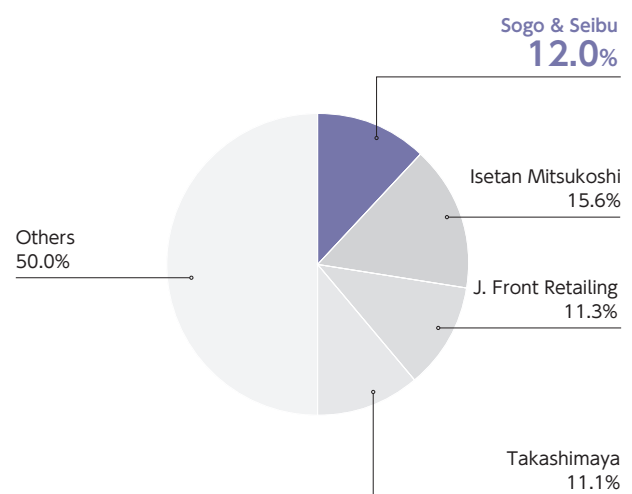
	FY2013 (¥ Billion)	Share (%)
Superstores total market	12,905.7	100.0
1 Aeon Retail	1,978.9	15.3
2 Ito-Yokado	1,302.9	10.1
3 UNY	730.2	5.7
4 Daiei	632.0	4.9
Others	8,261.6	64.0
Top Four Combined	4,644.1	36.0
York-Benimaru	358.0	2.8
York Mart	121.6	0.9



AMONG TOP FOUR FOR NET SALES AT DEPARTMENT STORES

	FY2013 (¥ Billion)	Share (%)
Department stores total market	6,649.3	100.0
1 Isetan Mitsukoshi	1,039.5	15.6
2 Sogo & Seibu	798.4	12.0
3 J. Front Retailing	750.3	11.3
4 Takashimaya	735.3	11.1
Others	3,325.6	50.0
Top Four Combined	3,323.6	50.0

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



Sources: Published material from the Current Survey of Commerce (Ministry of Economy, Trade and Industry) and the Japan Franchise Association's Convenience Store Statistics Investigation Monthly Report

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