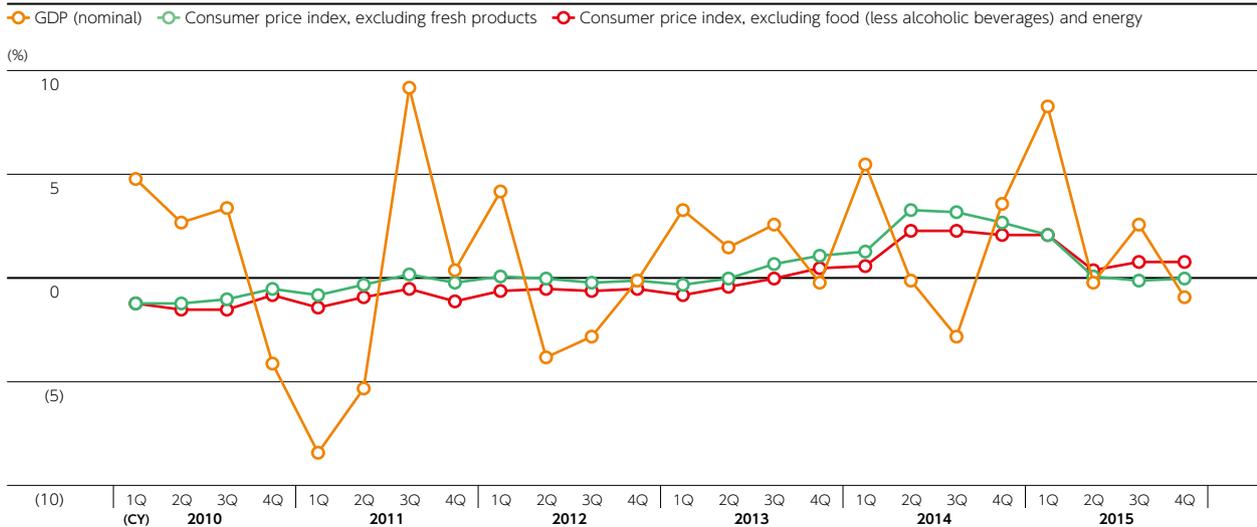


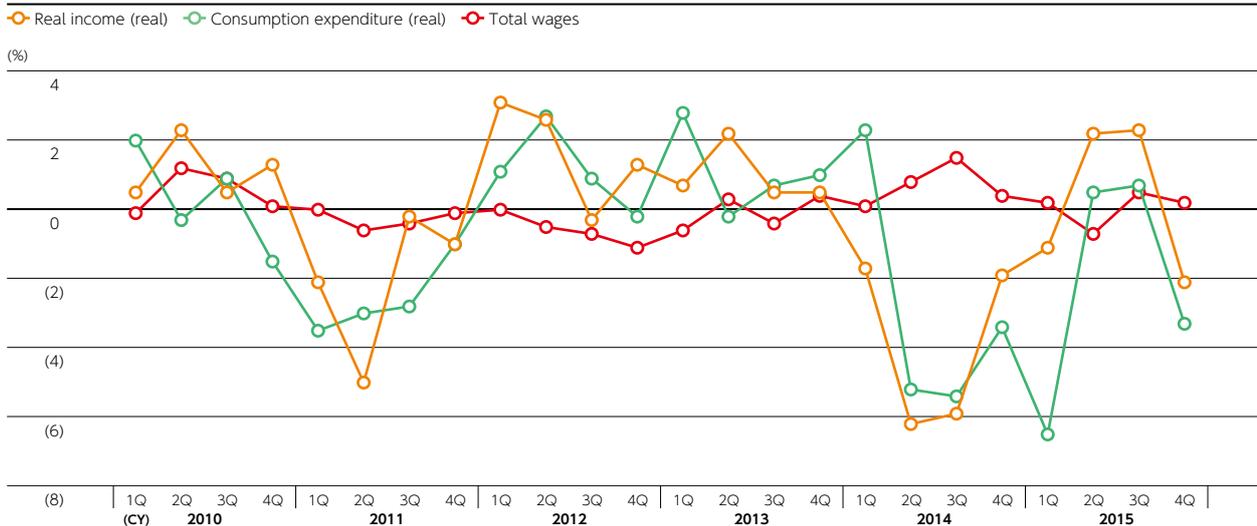
Consumer Environment

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



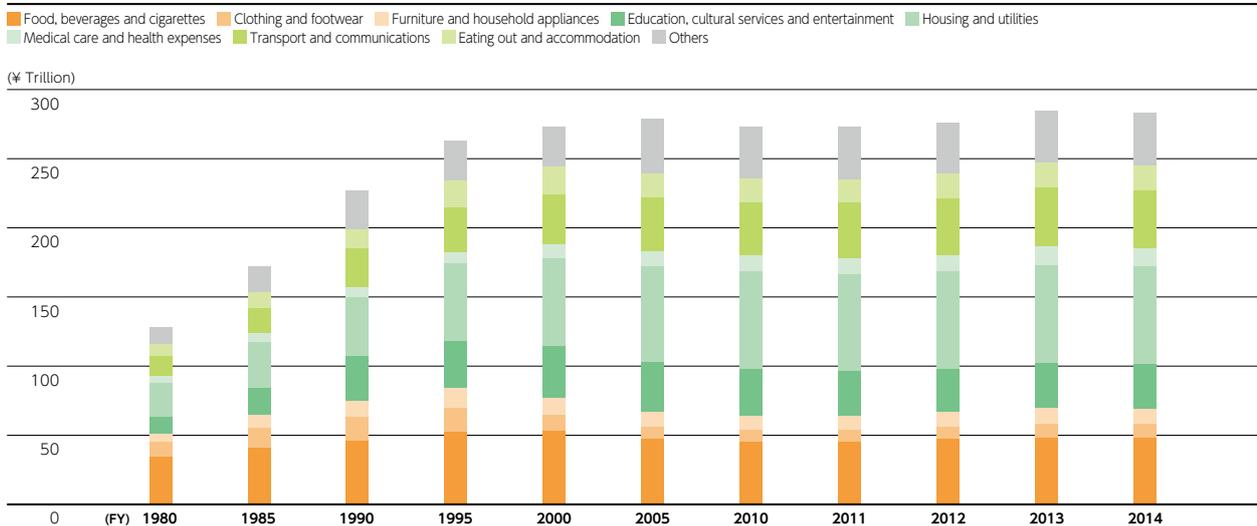
Sources: National Accounts (Economic and Social Research Institute, Cabinet Office) and Consumer Price Index (Ministry of Internal Affairs and Communications)

YEAR-ON-YEAR COMPARISON OF HOUSEHOLD CONSUMPTION INDICES OVER FOUR QUARTERS



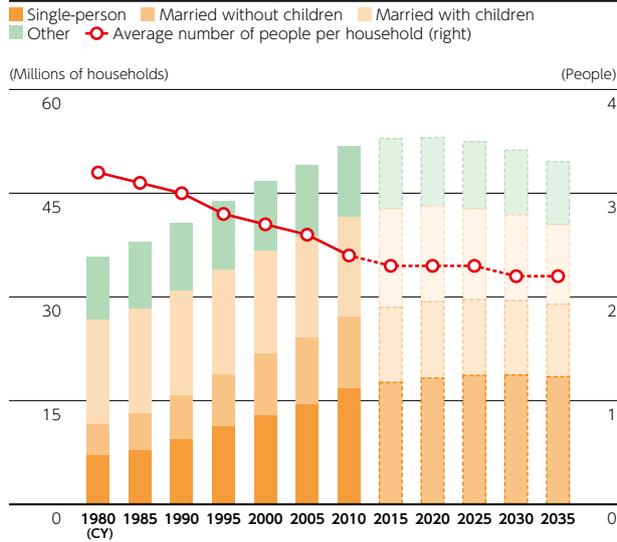
Sources: Family Income and Expenditure Survey (Ministry of Internal Affairs and Communications) and Monthly Labour Survey (Ministry of Health, Labour and Welfare)

DOMESTIC FINAL CONSUMPTION EXPENDITURE OF HOUSEHOLDS



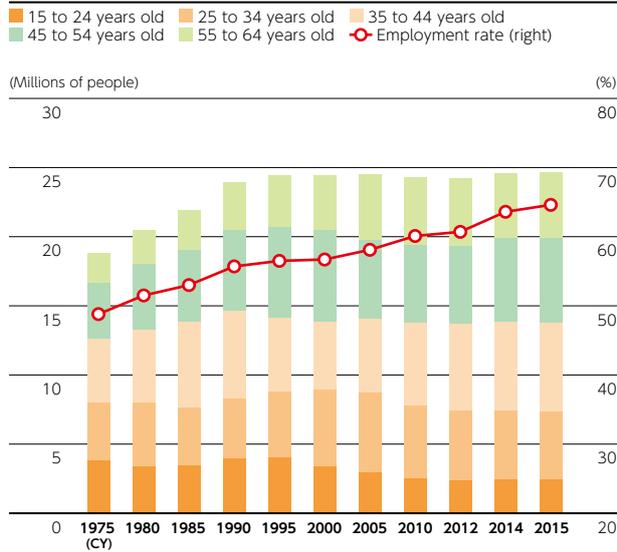
Note: The figures before 2000 are based on an old standard.
 Source: National Accounts (Economic and Social Research Institute, Cabinet Office)

CHANGES IN THE NUMBER OF HOUSEHOLDS



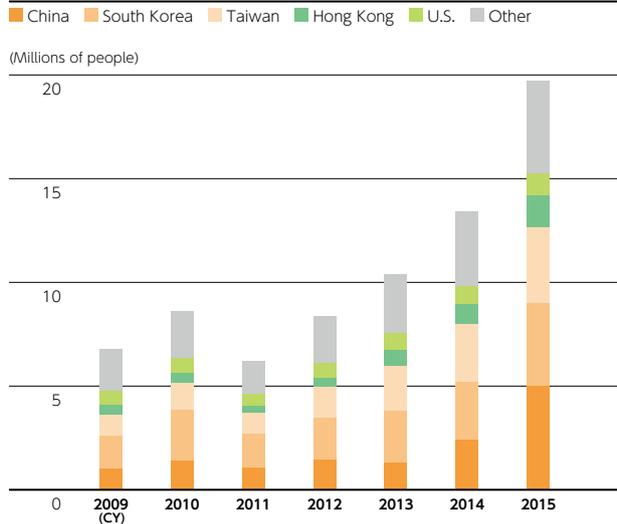
Source: National Institute of Population and Social Security Research

THE NUMBER OF FEMALE WORKERS AND THEIR EMPLOYMENT RATE



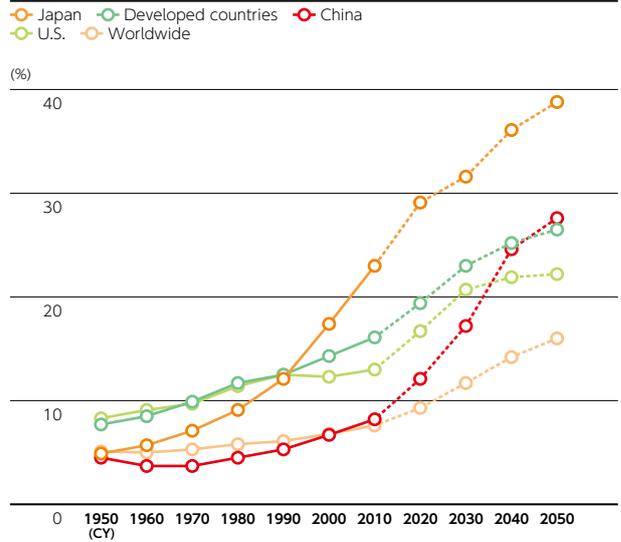
Source: Labour Force Survey (Ministry of Internal Affairs and Communications)

THE NUMBER OF FOREIGN TOURISTS



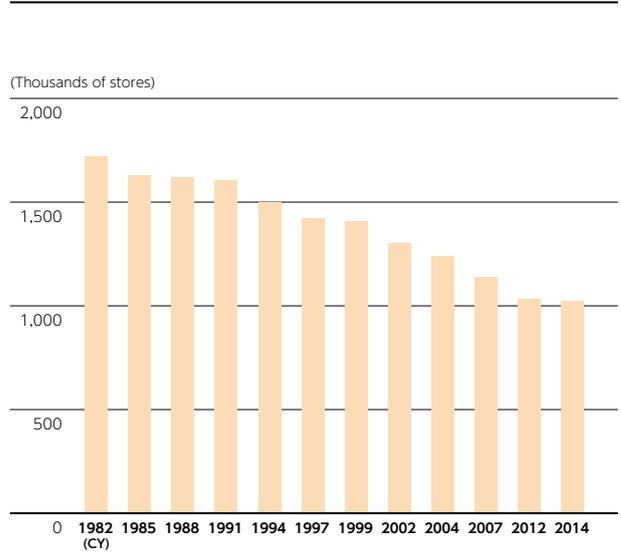
Source: Japan National Tourism Organization

CHANGES IN THE POPULATION OF THOSE AGED OVER 65



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

TREND IN THE NUMBER OF RETAIL STORES



Source: The Census of Commerce

Profile

Performance Overview

Global Retail Industry Data

Retail Environment in Japan

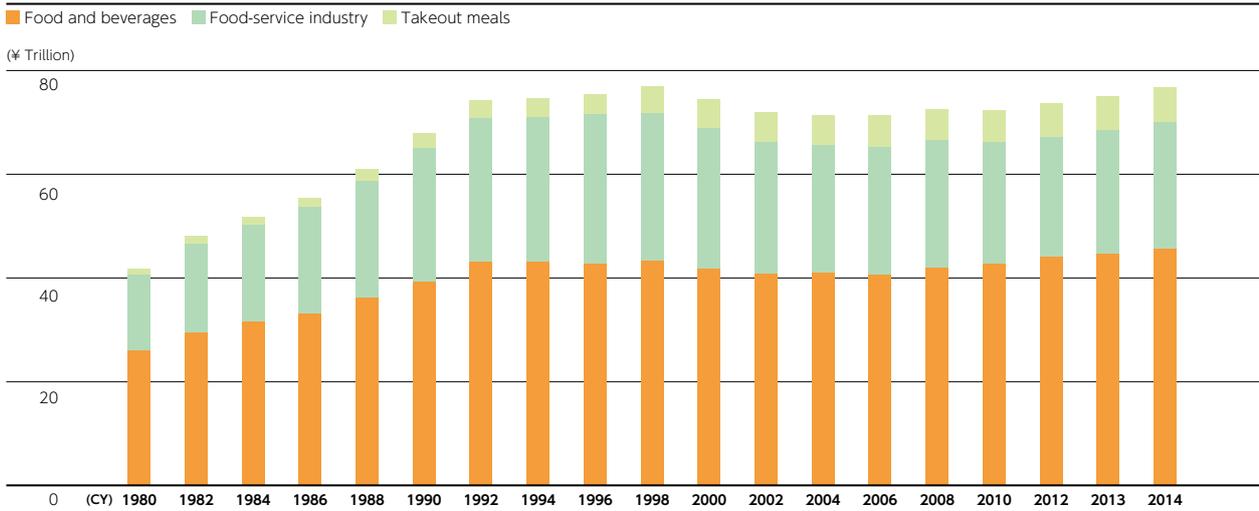
Group Business Strategy

Major Group Companies' Data

Corporate Data

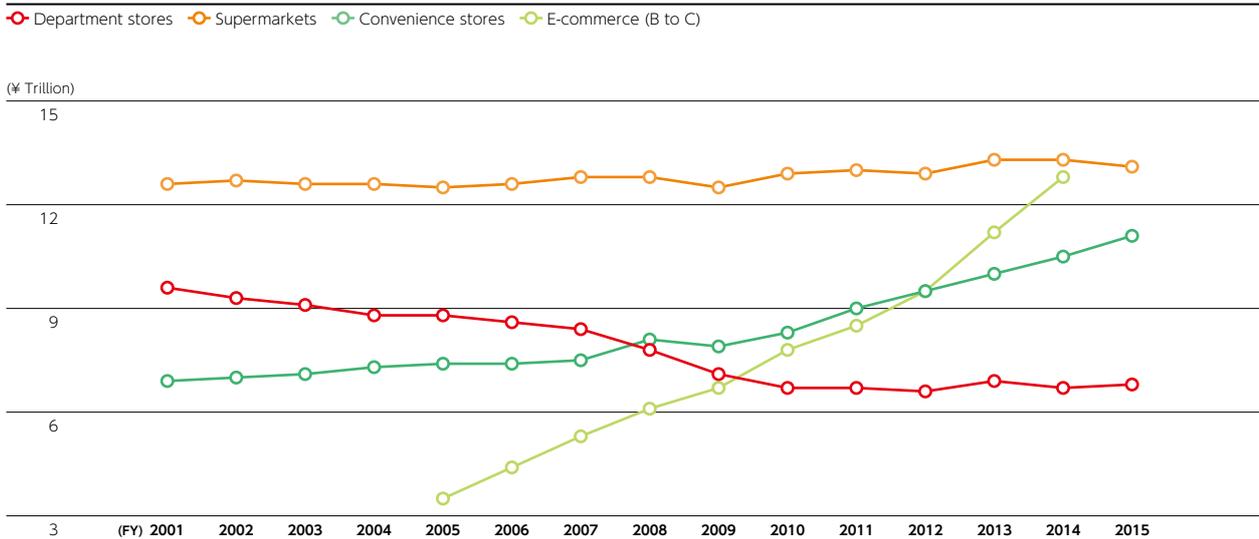
Environment of the Retail Industry

TRENDS IN THE SCALE OF THE FOOD MARKET



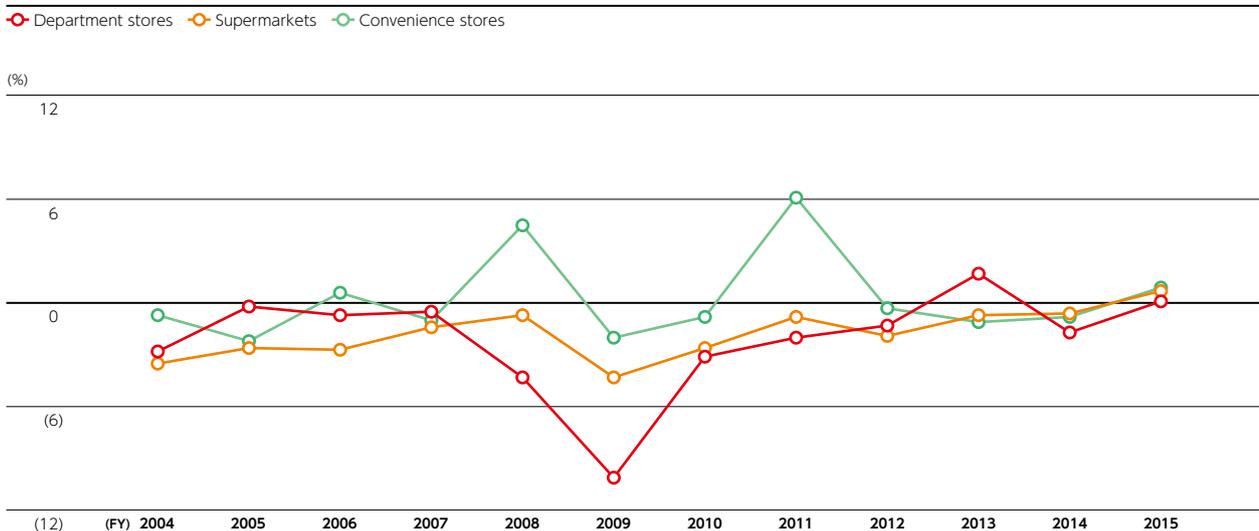
Sources: Current Survey of Commerce (Ministry of Economy, Trade and Industry) and the Foodservice Industry Research Institute

TREND IN NET SALES AT MAJOR STORE FORMATS



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

YEAR-ON-YEAR COMPARISON OF GROWTH IN EXISTING-STORE SALES AT MAJOR STORE FORMATS



Sources: Japan Department Stores Association, Japan Chain Stores Association and Japan Franchise Association

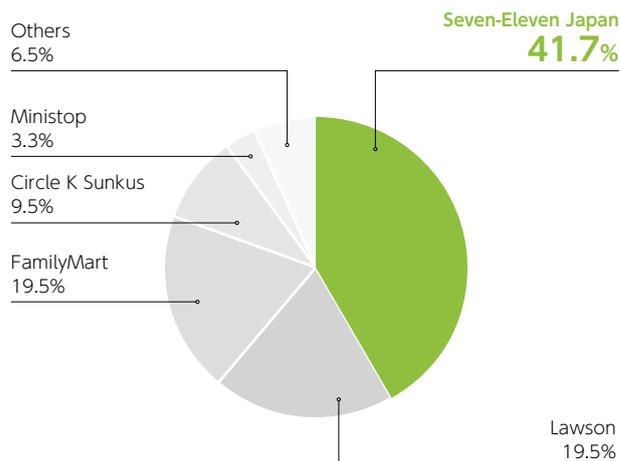
Major Group Companies' Market Share in Japan (Nonconsolidated)

AMONG TOP FIVE FOR TOTAL STORE SALES AT CONVENIENCE STORES

	FY2016 (¥ Billion)	Share (%)
Convenience stores total market*1	10,281.0	100.0
1 Seven-Eleven Japan	4,291.0	41.7
2 Lawson*2	2,006.1	19.5
3 FamilyMart	2,005.5	19.5
4 Circle K Sunkus*2	974.5	9.5
5 Ministop	336.3	3.3
Others	667.4	6.5
Top five combined	9,613.6	93.5

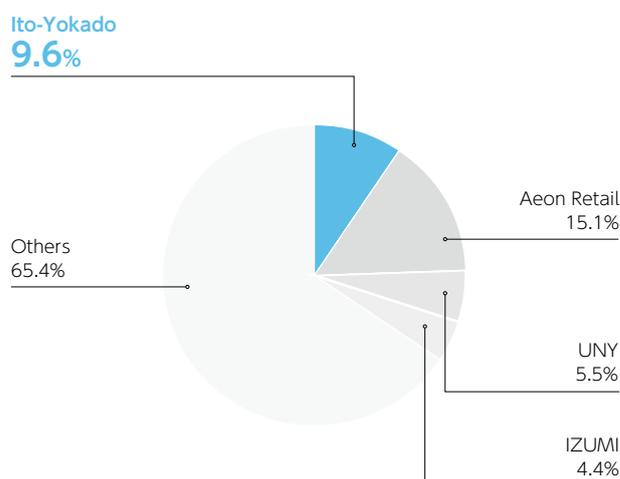
*1 Figures for convenience stores and chain stores are simple sums of sales from March 2015 to February 2016, according to the Japan Franchise Association's Convenience Store Statistics Investigation Monthly Report.

*2 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 their domestic convenience store subsidiaries.



AMONG TOP FOUR FOR NET SALES AT SUPERSTORES

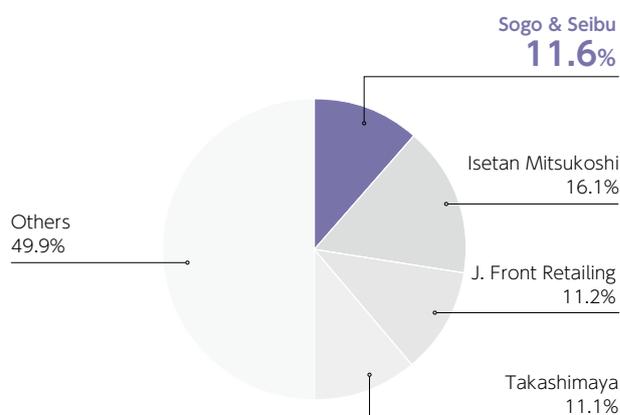
	FY2016 (¥ Billion)	Share (%)
Superstores total market	13,147.3	100.0
1 Aeon Retail	1,990.5	15.1
2 Ito-Yokado	1,255.6	9.6
3 UNY	716.9	5.5
4 IZUMI	580.5	4.4
Others	8,603.6	65.4
Top four combined	4,543.6	34.6
<Reference>		
York-Benimaru	406.2	3.1
York Mart	140.1	1.1



AMONG TOP FOUR FOR NET SALES AT DEPARTMENT STORES

	FY2016 (¥ Billion)	Share (%)
Department stores total market	6,792.2	100.0
1 Isetan Mitsukoshi	1,094.4	16.1
2 Sogo & Seibu	790.7	11.6
3 J. Front Retailing	763.2	11.2
4 Takashimaya	755.0	11.1
Others	3,388.8	49.9
Top four combined	3,403.4	50.1

Note: Net sales of Isetan Mitsukoshi, J. Front Retailing and Takashimaya represent simplified sums 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

Profile

Performance Overview

Global Retail Industry Data

Retail Environment in Japan

Group Business Strategy

Major Group Companies' Data

Corporate Data