



Learn about Seven & i Holdings

- Corporate Profile
- Seven & i Holdings in Numbers

Learn about the Market Environment

- Domestic Macroeconomic Environment**
- Domestic Environment of the Retail Industry
- U.S. Macroeconomic Environment and Environment of the Retail Industry
- Major Operating Companies' Market Share (Nonconsolidated)

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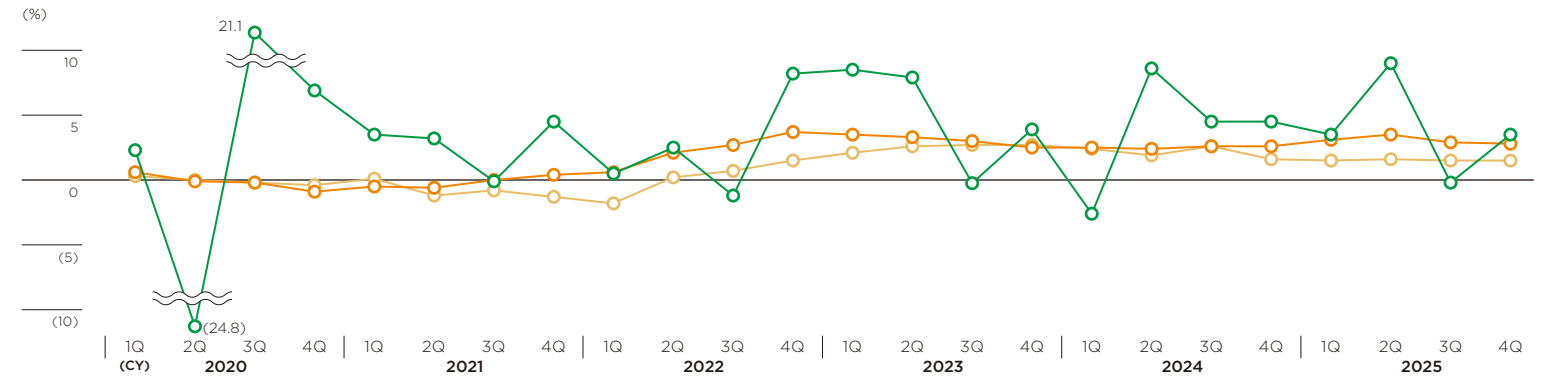
- Group History

Domestic Macroeconomic Environment

Year-on-year comparison of economic indices over quarters

- GDP (nominal)
- Consumer price index, All items excluding fresh food
- Consumer price index, All items excluding food (less alcoholic beverages) and energy

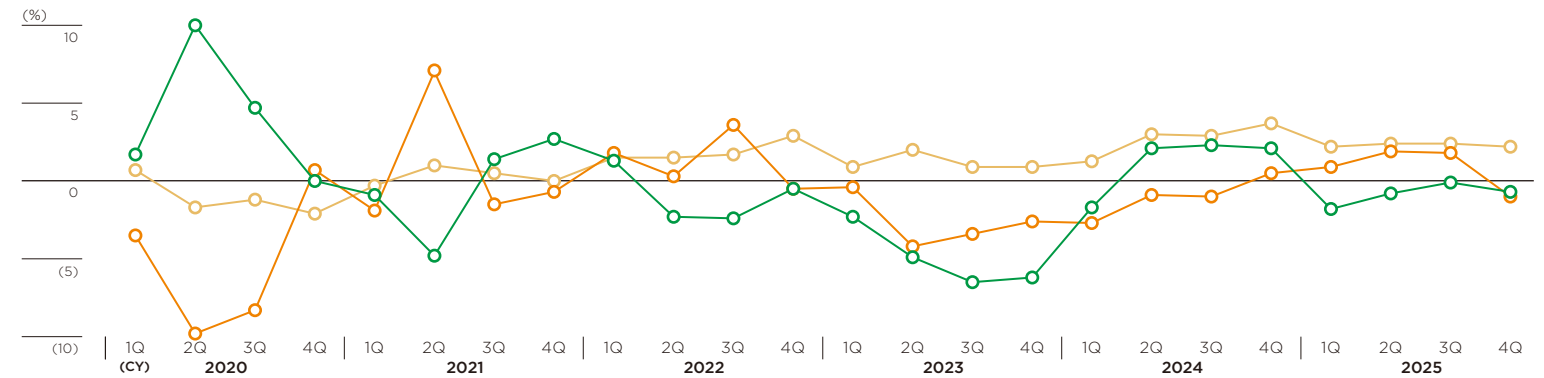
Sources: System of National Accounts (SNA) (Economic and Social Research Institute, Cabinet Office)
Consumer Price Index (Ministry of Internal Affairs and Communications)



Year-on-year comparison of household consumption indices over quarters

- Real income (real)
- Consumption expenditure (real)
- Total wages

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

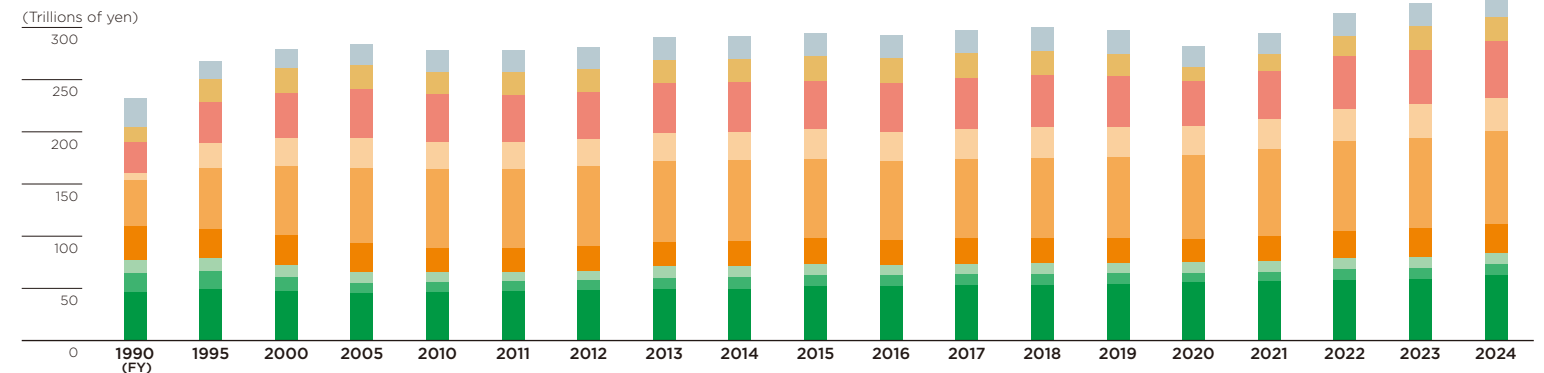


Domestic final consumption expenditure of households

- Food, beverages and cigarettes
- Clothing and footwear
- Furniture and household appliances
- Education, cultural services and entertainment
- Housing and utilities
- Medical care and health expenses
- Transport and communications
- Eating out and accommodation
- Others

Notes) 1. The figures before 2000 are based on an old standard.
2. Revised retroactively from 1994 (due to revision of estimation method)

Source: System of National Accounts (SNA) (Economic and Social Research Institute, Cabinet Office)





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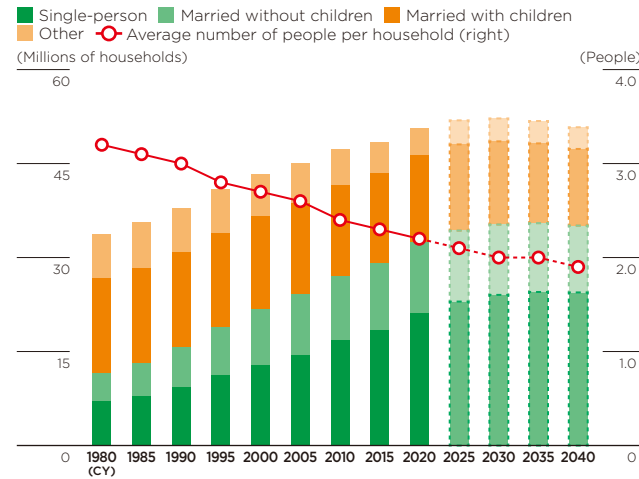
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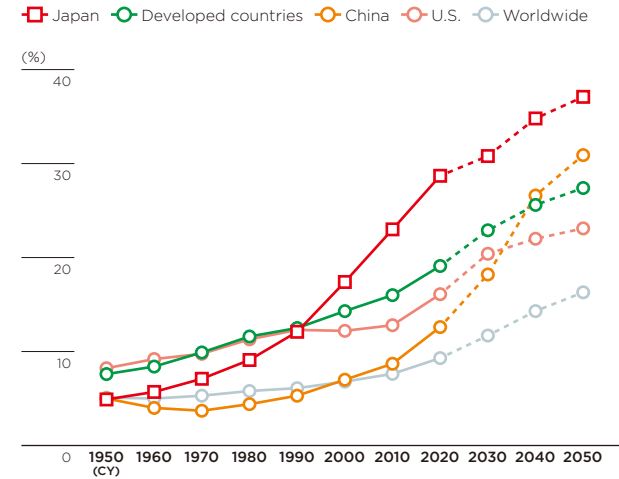
Domestic Macroeconomic Environment

Changes in the number of households



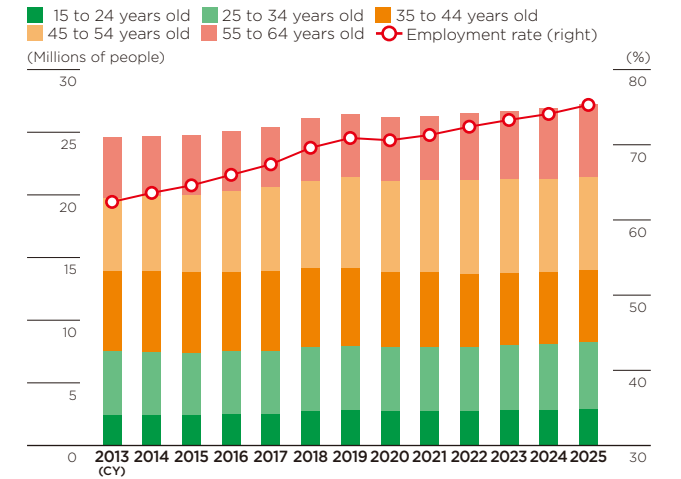
Note) The figures on 2025 and after.
Source: National Estimates, Population Projection for Japan (National Institute of Population and Social Security Research)

Changes in the population of those aged over 65



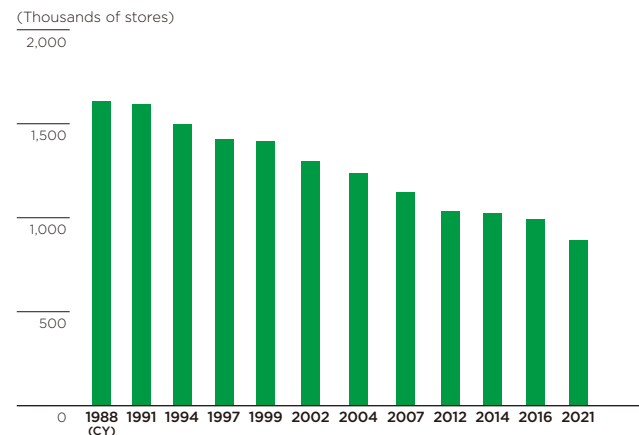
Note) The figures after 2025 are estimates.
Source: Statistical Handbook of the World (Ministry of Internal Affairs and Communications)

The number of female workers and their employment rate



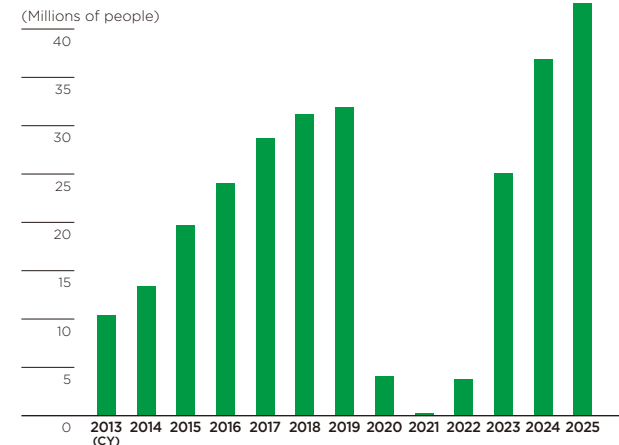
Source: Labour Force Survey (Ministry of Internal Affairs and Communications)

Trend in the number of retail stores



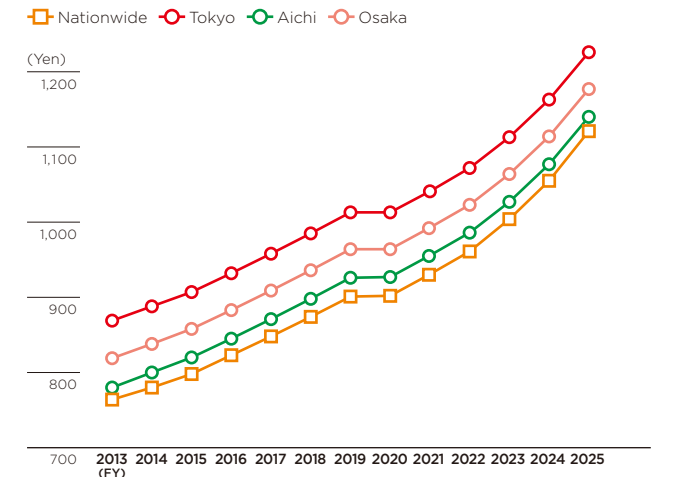
Sources: The Census of Commerce (Ministry of Economy, Trade and Industry) <until 2007>
Economic Census (Ministry of Economy, Trade and Industry; Ministry of Internal Affairs and Communications) <from 2012>

The number of tourists from overseas



Source: Japan National Tourism Organization

Minimum wage nationwide and in three main metropolitans



Note) Nationwide: Weighted average
Source: Revised List of Regional Minimum Wages (Ministry of Health, Labour and Welfare)



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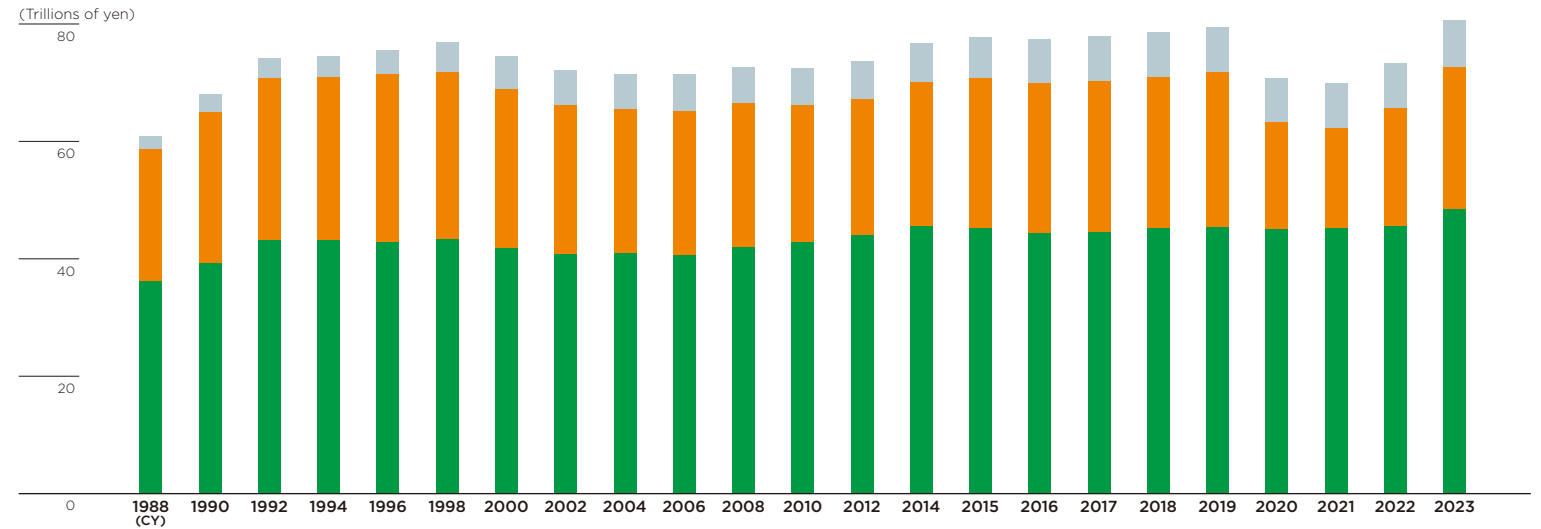
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Domestic Environment of the Retail Industry

Trends in the scale of the food market

- Food and beverage retailers
- Food-service industry
- Takeout meals industry

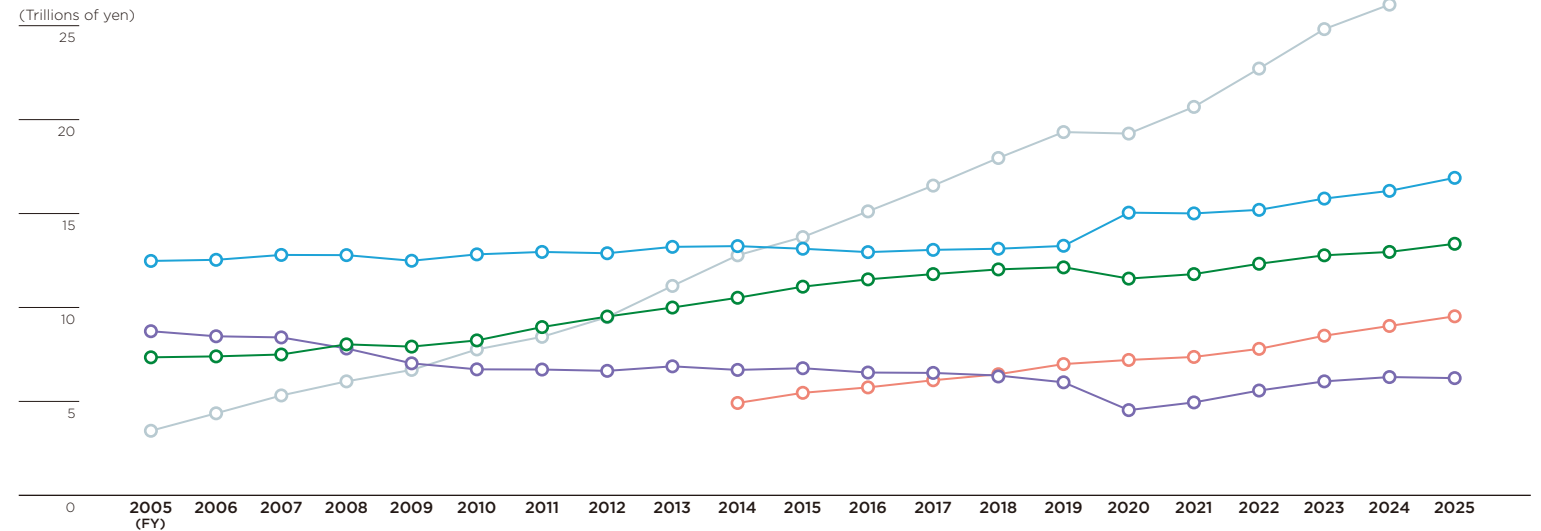
Sources: Current Survey of Commerce (Ministry of Economy, Trade and Industry)
Estimates in the Scale of the Food Market (Foodservice Industry Research Institute)



Trends in net sales at major store formats

- Convenience stores
- Supermarkets
- Department stores
- Drugstores
- E-commerce (B to C)

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





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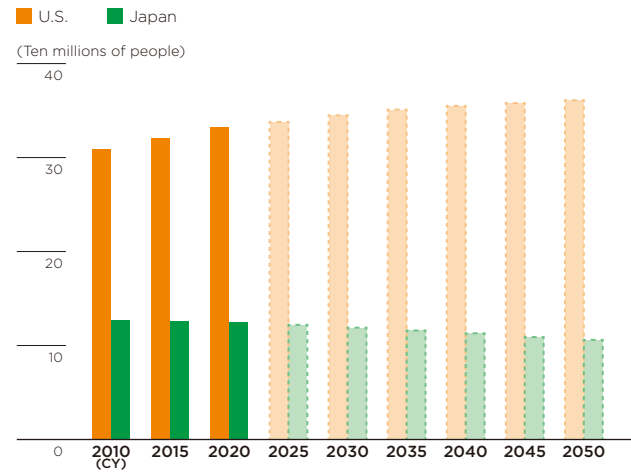
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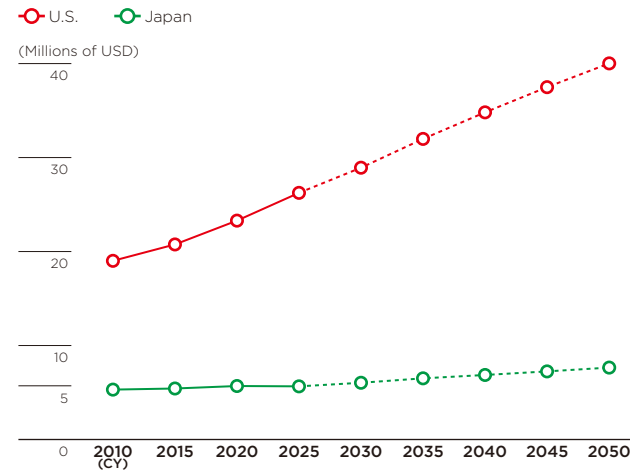
U.S. Macroeconomic Environment and Environment of the Retail Industry

Demographic forecast



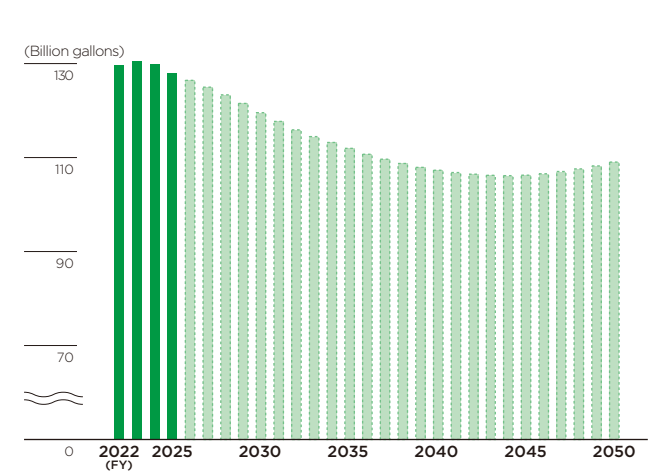
Note) The figures on 2025 and after are estimates.
Source: U.S. Census Bureau

Real GDP



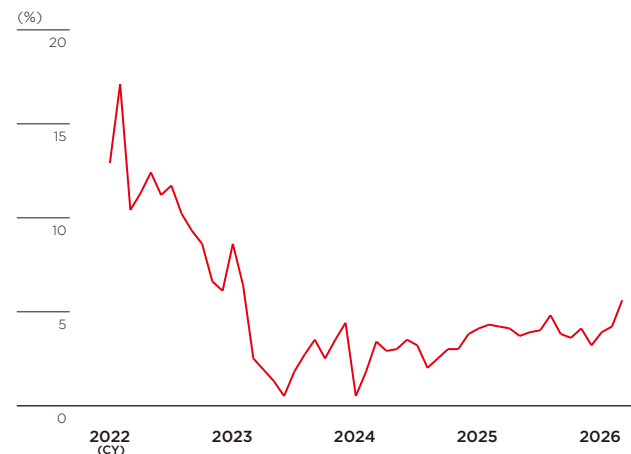
Note) The figures on 2025 and after are estimates.
Source: Organisation for Economic Co-operation and Development

Fuel consumption forecast



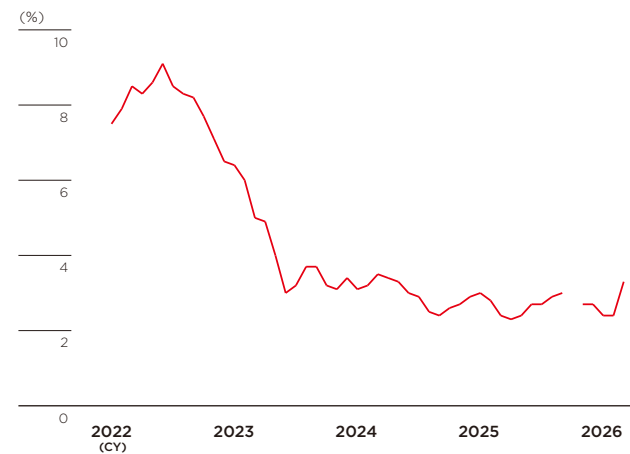
Source: U.S. Energy Information Administration

Growth in retail sales (excluding automobiles, seasonally adjusted)



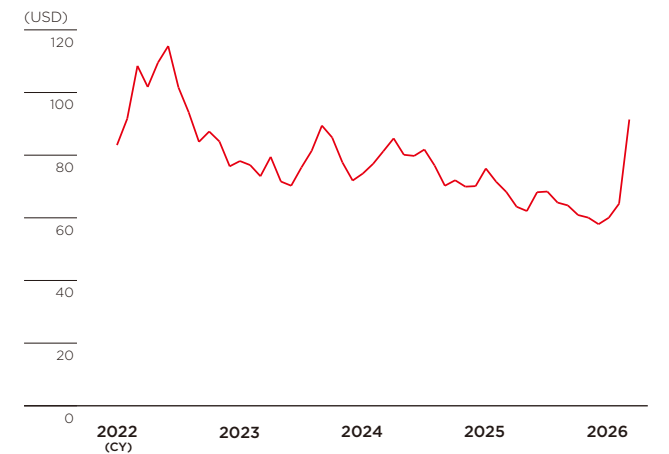
Source: U.S. Internal Revenue Service

Consumer price index (CPI)



Note) The Oct 2025 data values are not available due to the 2025 lapse in appropriations.
Source: U.S. Bureau of Labor Statistics

Crude oil price (WTI)



Source: U.S. Energy Information Administration



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Major Operating Companies' Market Share (Nonconsolidated)

Top 3 in gross total store sales at convenience stores

	FY2025 (Billions of yen)	Share (%)
Convenience stores total market*	12,091.9	100.0
1 Seven-Eleven Japan	5,490.3	45.4
2 FamilyMart	3,300.2	27.3
3 Lawson	2,625.4	21.7
Others	676.0	5.6
Top 3 combined	11,415.9	94.4

* The figure for convenience stores total market is the sum of sales from March 2025 to February 2026, according to the Japan Franchise Association's Convenience Store Statistics Investigation Monthly Report.

Top 3 convenience store market shares in the U.S.

	Share (%)
1 7-Eleven, Inc.	8.0
2 Alimentation Couche-Tard Inc.	4.0
3 Casey's General Stores Inc	1.9
Others	86.1
Top 3 combined	13.9

* As of December 31, 2025

Sources: Published material from the Current Survey of Commerce (Ministry of Economy, Trade and Industry)
Convenience Store Statistics Investigation Monthly Report (Japan Franchise Association)
Materials disclosed by individual companies
NACS

