

## JFA Franchise Chain Annual Report(April 1, 2014-March 31, 2015)

### «Highlights»

Despite the newly applied increased consumption tax of April 1, the franchise industry has mostly shown a steady growth.

Number of CVS outlets exceeded 55,000, and the total sales amounted for over JPY10,000,000,000,000= 83 Billion Euros, thus CVSs are deemed to have become an essential means for Japanese living.

### «Overall Trend during this fiscal year»

- 1) Number of Franchise Chains in Japan: 1,321 (+1.3%,+17 new chains, increase observed for 5 consecutive years)
- 2) Total number of units(both those directly operated and franchisees): 259,124 units (+2.6%, +6,610 new units, increase observed for 6 consecutive years)
- 3) Total Sales: JPY 24,133,700,000,000= 201 Billion Euros (+2.8%, Increase for 5 consecutive years)
- 4) 1 Less Retail Franchise Chain. +4.1% in Number of Units(4,213) +3.0%(+JPY490,800,000,000 +4.09 Billion Euros)
- 5) Number of CVS chains remains the same.  
Sales:+5.4%(+JPY518,300,000,000 = 4.32 Billion Euros)
- 6) Number of Restaurant Chains: +12 chains, Number of Units:+2.1% in number of Units(+1,227 Units), Sales:+1.8%(+JPY71,600,000,000 = 600 Million Euros)
- 7) Service Sector:+6 Chains,+1.3% in Number of Units(+1,170 Units)  
Sales: +3.1%(JPY94,000,000,000 = 783 Million Euros)

2014-2015 JFA Members Data									
	# of Franchise Chains			# of Units			Sales(in Million Yen)		
	Total	JFA Members	SHARE	Total	JFA Members	SHARE	TOTAL	JFA MEMBERS	SHARE
TOTAL	1,321	302	22.9%	259,124	127,185	49.1%	24,133,693	14,001,155	58.0%
RETAIL	344	78	22.7%	105,873	63,977	60.4%	16,945,431	10,787,608	63.7%
(CVS AMONG RETAIL)	26	21	80.8%	55,774	54,453	97.6%	10,132,312	9,952,258	98.2%
RESTAURANT	562	140	24.9%	58,910	27,564	46.8%	4,104,539	2,055,319	50.1%
SERVICE	415	84	20.2%	94,341	35,644	37.8%	3,083,723	1,158,228	37.6%

### BRD Società Cooperativa

Sede legale Piazza Marconi, 11 – 02100 Rieti C.F./P.IVA 01093860573

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**2014-2015 JAPANESE FRANCHISE STATS  
BY SECTOR, #OF UNITS, SALES**

OCTOBER, 2015

(一社) 日本フランチャイズチェーン協会

	# OF FCHCHISE			# OF UNITS				SALES IN MILLION YEN			
	2013	2014	+/-	2013	2014	+/-	2014/2013	2013	2014	+/-	2014/2013
GRAND TOTAL (1) + (2) + (3)	1,304	1,321	17	252,514	259,124	6,610	102.6%	23,477,314	24,133,693	656,379	102.8%
<b>RETAIL TOTAL(1)</b>	345	344	-1	101,660	105,873	4,213	104.1%	16,454,616	16,945,431	490,815	103.0%
GMS	66	66	0	63,620	66,730	3,110	104.9%	11,291,502	11,888,918	597,416	105.3%
CVS	26	26	0	52,902	55,774	2,872	105.4%	9,613,971	10,132,312	518,341	105.4%
GENERAL STORES	26	26	0	8,508	8,560	52	100.6%	1,560,424	1,633,539	73,115	104.7%
HOME DELIVERY/CATALOG/ONLINE	14	14	0	2,210	2,396	186	108.4%	117,107	123,067	5,960	105.1%
CLOTHING, SHOES, ACCESSORIES	31	32	1	4,141	4,345	204	104.9%	168,509	177,350	8,841	105.2%
FOOD & BEVERAGE RETAIL	61	62	1	6,151	6,244	93	101.5%	414,979	435,107	20,128	104.9%
GROCERY	23	23	0	2,255	2,290	35	101.6%	253,836	263,759	9,923	103.9%
SWEETS, BREAD	38	39	1	3,896	3,954	58	101.5%	161,143	171,348	10,205	106.3%
AUTOMOBILE, BICYCLE	30	30	0	4,963	4,996	33	100.7%	627,489	587,778	-39,711	93.7%
HOME FURNITURE, APPLIANCES, GOODS	29	28	-1	4,346	4,430	84	101.9%	2,413,123	2,270,716	-142,407	94.1%
DRUGS, BOOKS, SPORTING GOODS, USED ITEMS	128	126	-2	18,439	19,128	689	103.7%	1,539,014	1,585,562	46,548	103.0%
<b>FOOD &amp; BEVERAGE TOTAL (2)</b>	550	562	12	57,683	58,910	1,227	102.1%	4,032,968	4,104,539	71,571	101.8%
FAST FOOD	239	243	4	32,462	33,080	618	101.9%	2,101,694	2,077,983	-23,711	98.9%
TAKEOUT SUSHI, BOXED MEALS	22	22	0	8,198	8,283	85	101.0%	399,430	398,661	-769	99.8%
RAMEN, CHINESE DUMPLING	95	95	0	4,824	5,053	229	104.7%	226,524	236,566	10,042	104.4%
CURRY, BEEF BOWL	18	20	2	4,119	4,392	273	106.6%	290,520	308,689	18,169	106.3%
HAMBURGER	8	8	0	5,555	5,439	-116	97.9%	660,308	604,333	-55,975	91.5%
ICE CREAM	8	8	0	1,502	1,522	20	101.3%	44,643	43,580	-1,063	97.6%
OTHER FAST FOOD	88	90	2	8,264	8,391	127	101.5%	480,269	486,154	5,885	101.2%
GENERAL RESTAURANT	172	175	3	13,234	13,640	406	103.1%	1,138,970	1,198,640	59,670	105.2%
JAPANESE & SUSHI	57	57	0	2,905	3,032	127	104.4%	198,112	202,686	4,574	102.3%
WESTERN, STEAK, PIZZA, PASTA	45	47	2	3,855	3,969	114	103.0%	324,361	337,695	13,334	104.1%
CHINESE	8	8	0	1,172	1,195	23	102.0%	121,818	128,157	6,339	105.2%
BBQ, OTHER RESTAURANTS	62	63	1	5,302	5,444	142	102.7%	494,679	530,102	35,423	107.2%

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TAVERN, PUB	98	102	4	6,595	6,649	54	100.8%	433,885	436,441	2,556	100.6%
COFFEE SHOP	41	42	1	5,392	5,541	149	102.8%	358,420	391,475	33,055	109.2%
<b>SERVICE SECTOR TOTAL(3)</b>	<b>409</b>	<b>415</b>	<b>6</b>	<b>93,171</b>	<b>94,341</b>	<b>1,170</b>	<b>101.3%</b>	<b>2,989,730</b>	<b>3,083,723</b>	<b>93,993</b>	<b>103.1%</b>
CLEANING SERVICE, LAUNDRY	26	27	1	5,575	5,678	103	101.8%	144,323	145,697	1,374	101.0%
BARBAR, BEAUTY	47	48	1	4,632	4,773	141	103.0%	108,265	108,444	179	100.2%
DPE/PRINTING/COPYING SERVICE	10	10	0	1,908	1,954	46	102.4%	70,514	74,397	3,883	105.5%
LEASURE SERVICE, HOSPITALITY	25	24	-1	1,167	1,133	-34	97.1%	212,686	209,673	-3,013	98.6%
AUTO SERVICE	9	9	0	1,709	1,731	22	101.3%	16,791	16,910	119	100.7%
LEASE/RENTAL SERVICE	29	29	0	13,057	13,102	45	100.3%	844,602	862,759	18,157	102.1%
TUTORING/CULTURE SCHOOL	88	90	2	32,054	32,274	220	100.7%	450,251	475,352	25,101	105.6%
HOME BUILDING,RENOVATION,BDG MAINTENANCE	58	59	1	8,794	9,048	254	102.9%	718,104	746,553	28,449	104.0%
OTHER SERVICES	117	119	2	24,275	24,648	373	101.5%	424,194	443,938	19,744	104.7%

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