

Market Data

Growth in the Express Home Delivery Market

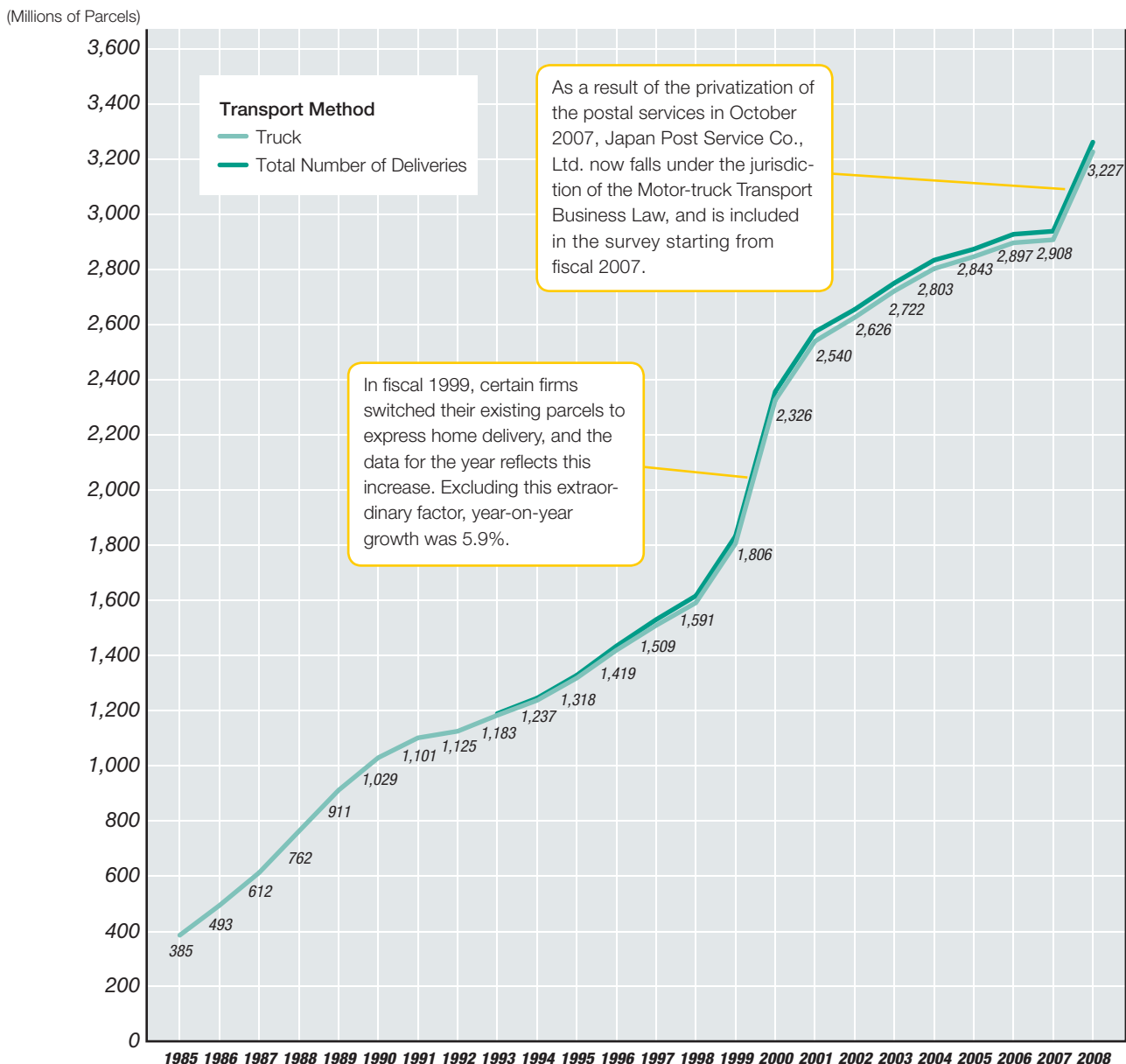
Trends in Parcel Delivery Volume

This survey uses company-reported parcel delivery volume data compiled by the Ministry of Land, Infrastructure, Transport and Tourism.

In the data, “parcels” denotes individual packages weighing less than 30 kg, irrespective of the type of delivery (C2C, B2C, or B2B).

However, lots in which multiple packages are sent together and parcels that do not require a signature on delivery are not counted as “parcels” for the purposes of the survey.

Trends in Delivery Volume



Note: “Total Number of Deliveries” includes express home delivery services involving transport by truck, air, and other methods.

Source: Statistical survey from the Ministry of Land, Infrastructure, Transport and Tourism.

Growth of Takkyubin

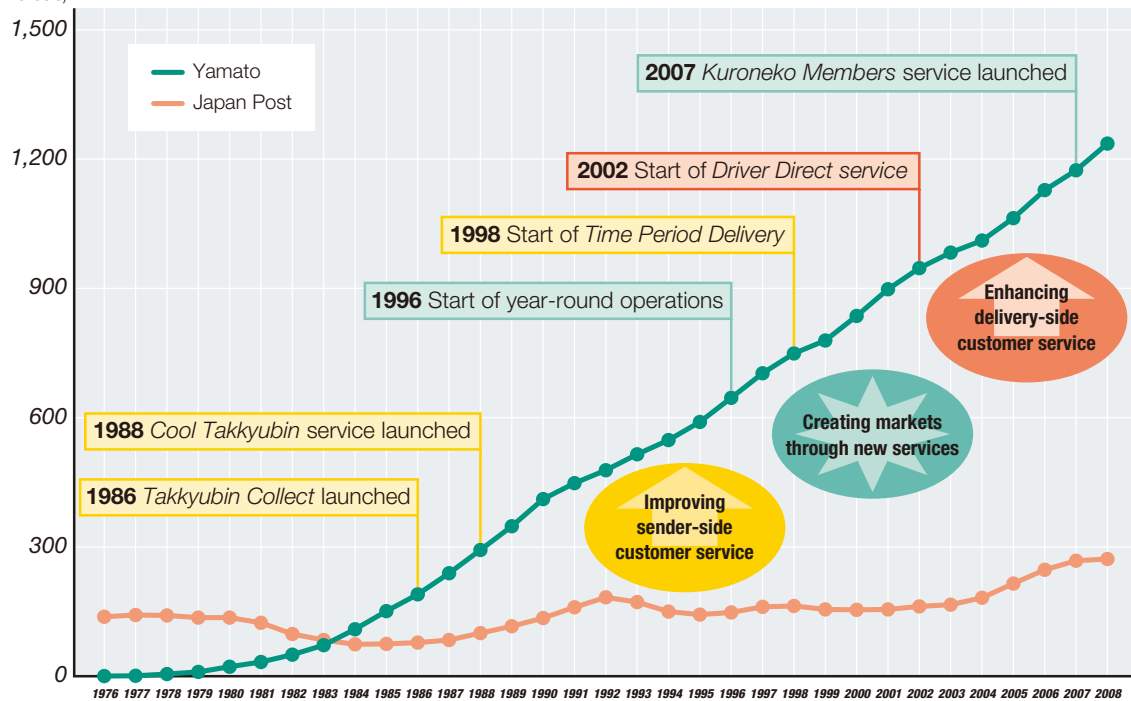
Takkyubin is the Yamato Group's flagship service offering. Since its launch in 1976, we have pursued a strategy of differentiation based on development of additional strategic offerings such as *Cool Takkyubin* and *Takkyubin Collect*, and

improvement of delivery quality, including enhanced features such as *Time Period Delivery* and *Driver Direct* services.

As a result of these efforts, the Yamato Group outperformed the growth in the express home delivery market as a whole, and we are steadily expanding our market share.

Timeline of New Product Development

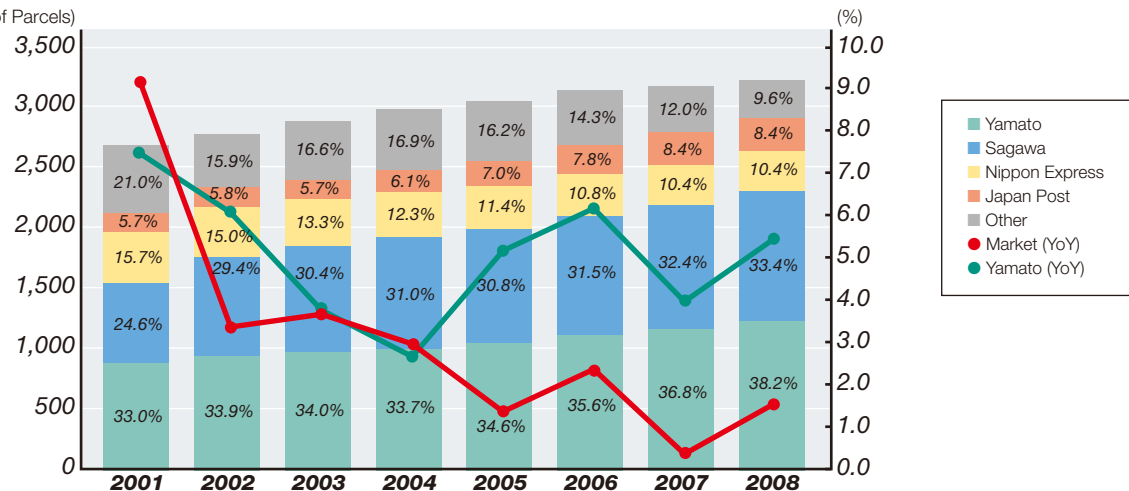
(Millions of Parcels)



Source: Japan Post Holdings Co., Ltd.

Market Share

(Millions of Parcels)



Sources: Ministry of Land, Infrastructure, Transport and Tourism and Japan Post Holdings Co., Ltd.