IR DAY 2026 Q&A Summary

<President session>

The essence of "Profit Opportunities are Shifting Downstream“ (2) Data-driven Value Creation

Date： July 8, 2026 (Wed) 16:25-16:55

Presenter: Shunsuke Noda, Senior Managing Executive Officer, President, ICT & Financial Business Company; Deputy COO

Kensuke Hosomi, Managing Executive Officer, President, The 8th Company

Moderator: Kazunori Harada, General Manager, Investor Relations Division

Terminology: FM = FamilyMart

Q: Regarding the future strategy of the 8th Company, is the policy to expand business primarily around “digital,” while collaborating not only with FM but also with other segments? If there are any other strategic directions, please share them. Also, will FM remain the core of the growth strategy?

A: (Respondent: Hosomi, President of the 8th Company) FM is not only involved in the food business; it also has both physical and digital infrastructure and plays an important role in “display sales” at the full price. As seen in the case where Couche-Tard considered acquiring Seven & i Holdings, Japan’s retail market has been unified into a single “platform” through the convenience store system, making it easier for foreign capital to enter Japan’s retail infrastructure. Convenience stores are not merely the last remaining real infrastructure in food retail but also serve as infrastructure for tax collection. For example, FM alone collects more than ¥5 trillion in taxes annually, including tobacco tax and motor vehicle tax. Going forward, we intend to expand and diversify the business by applying these infrastructure functions more broadly.

That said, the 8th Company’s strategy is not necessarily centered solely on FM. We are building our strategy based on “data” and “media.” At Data One, about half of the data is acquired from sources outside of FM, in addition to data obtained from FM itself. We are currently examining how best to leverage this “data infrastructure” together with FM’s “store infrastructure” in an integrated manner.