

Consolidated Financial Results for the First Half ended September 30, 2013 (Japanese Accounting Standard)

Company Name: LIXIL GROUP CORPORATION

Stock Listings: Tokyo, Nagoya

Code Number: 5938

URL: <http://www.lixil-group.co.jp/e/ir/default.htm>

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Scheduled date of issue of quarterly financial report: November 12, 2013

Date of scheduled payment of dividends: November 29, 2013

Preparation of supplementary materials for quarterly financial results: Yes

Information meeting for quarterly financial results to be held: Yes (For investment analysts and institutional investors)

(Amounts less than one million yen are omitted.)

1. Consolidated financial results for the 1H of FY Ending March 2014 (April 1, 2013 through September 30, 2013)

(1) Consolidated Operating Results (% indicate changes from the figures of corresponding period of the previous fiscal year)

| | Net sales | | Operating income | | Recurring profit | |
|-------------------|----------------|------------|------------------|-------------|------------------|--------------|
| | Million yen | % | Million yen | % | Million yen | % |
| FY 2014 1H | 741,512 | 8.6 | 25,966 | 88.7 | 28,951 | 132.0 |
| FY 2013 1H | 682,917 | 12.9 | 13,764 | - | 12,476 | - |

| | Net income | | Net income per share | |
|-------------------|---------------|---|----------------------|-----------------|
| | Million yen | % | -basic yen | -diluted yen |
| FY 2014 1H | 17,777 | - | 61.14 | 60.93 |
| FY 2013 1H | -10,380 | - | -35.70 | - |

(Note) Comprehensive income FY 2014 1H 36,438 million yen (-%)

FY 2013 1H -13,408 million yen (-%)

(2) Consolidated Financial Position

| | Total assets | Net assets | Capital adequacy ratio | Net assets per share |
|-------------------|------------------|----------------|------------------------|----------------------|
| | Million yen | Million yen | % | Yen |
| FY 2014 1H | 1,578,102 | 593,498 | 37.2 | 2,019.30 |
| FY 2013 | 1,465,689 | 566,312 | 38.3 | 1,930.02 |

(Reference) Equity capital at end of period

FY 2014 1H 587,104 million yen FY 2013 561,160 million yen

2. Cash dividends

| | Dividends per share | | | | |
|--------------------|---------------------|-----------|-----------|---------------|--------------|
| | End of Q1 | End of Q2 | End of Q3 | End of period | For the year |
| | Yen | Yen | Yen | Yen | Yen |
| FY 2013 | - | 20.00 | - | 20.00 | 40.00 |
| FY 2014 | - | 25.00 | | | |
| FY 2014 (forecast) | | | - | 25.00 | 50.00 |

(Note) Revision of cash dividend forecast from those announced recently: None

3. Consolidated forecast for the fiscal year ending March 2014 (April 1, 2013 through March 31, 2014)

(% indicate changes from the figures of corresponding period of the previous fiscal year)

| | Net sales | | Operating income | | Recurring profit | | Net income | | Net income per share |
|----------------|------------------|-------------|------------------|-------------|------------------|-------------|---------------|-------------|----------------------|
| | Million yen | % | Million yen | % | Million yen | % | Million yen | % | Yen |
| FY 2014 | 1,600,000 | 11.4 | 70,000 | 38.7 | 70,000 | 31.9 | 41,000 | 92.1 | 141.02 |

(Note) Revision of consolidated operating performance forecast from those announced recently: None

4. Others

(1) Changes in significant subsidiaries during this quarter: Yes

Newly consolidated company: 1 (Name of the company) ASD Americas Holding Corp.

Excluded company: None

(2) Application of special accounting methods for presenting quarterly consolidated financial statements: None

(3) Changes in accounting policies, accounting estimation and restatements

1. Changes due to revisions in accounting standards: None

2. Changes other than the above: Yes

3. Changes to accounting estimates: None

4. Restatement of accounts: None

(4) Outstanding shares (common shares)

i) Number of shares outstanding at end of period (including treasury stocks)

| | | | |
|-------------------------------------|--------------------|-------------------------|--------------------|
| Six months ended September 30, 2013 | 313,054,255 shares | FY ended March 31, 2013 | 313,054,255 shares |
|-------------------------------------|--------------------|-------------------------|--------------------|

ii) Number of treasury stock at end of period

| | | | |
|-------------------------------------|-------------------|-------------------------|-------------------|
| Six months ended September 30, 2013 | 22,308,338 shares | FY ended March 31, 2013 | 22,300,227 shares |
|-------------------------------------|-------------------|-------------------------|-------------------|

iii) Average number of shares outstanding during the period

| | |
|-------------------------------------|--------------------|
| Six months ended September 30, 2013 | 290,749,949 shares |
|-------------------------------------|--------------------|

| | |
|-------------------------------------|--------------------|
| Six months ended September 30, 2012 | 290,760,512 shares |
|-------------------------------------|--------------------|

Note: Indication of quarterly review procedures implementation status

This quarterly financial results report is exempt from quarterly review procedures under Japan's Financial Instruments an Exchange Law.

The review procedure is not completed at the time of disclosure of this report.

Note: Appropriate use of business forecasts and other special items

Performance forecast and other forward-looking statements contained in this report are based on information currently available and on certain assumptions deemed rational at the time of this report's release. Due to various circumstances, however, actual results may differ significantly from such statements.

Note: Regarding presentation material to supplement the financial results' announcement is posted at the website of the Company.

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1. Performance and financial position

(1) Qualitative information regarding consolidated operating results

Japanese economy for the first six months of the fiscal year ending March 2014 was on a moderate recovery trend due to the improvement in consumer spending and corporate sentiment, supported by the positive effects of monetary and fiscal policies implemented by the government. As for housing investment, detached housing starts resulted in 499 thousand units (up by 12.7% y/y) maintaining stable growth.

Under such environment, LIXIL Group drove various measures based on its Medium-Term Business Plan LIXIL G-15, such as Japan core business shift, global expansion, leverage of distribution scale, expansion of core adjacencies, and operational excellence to achieve profitable growth. As part of the above mentioned, the Group acquired total shares of ASD Americas Holding Corp. and entered into a stock sale and purchase agreement through joint investment to acquire shares of GROHE Group S.à r.l. in this 1H.

As a result, the Group increased its consolidated net sales of the 1H for the fiscal year ending March 2014 to 741,512 million yen (up by 8.6% y/y) due to the favorable market conditions. The Group also achieved high level in profits. Operating income increased to 25,966 million yen (up by 88.7% y/y) by increase in sales, recurring profit greatly increased to 28,951 million yen (up by 2.3 times y/y) due to occurrence of foreign exchange gains, and net profit increased to 17,777 million yen. Net loss of 10,380 million yen was recorded for the same period of the previous fiscal year since there were special factors such as early retirement related loss.

Results by business segments were as follows.

[Metal building material business]

Sales increased by 8.9% year-on-year to 333,504 million yen due to the absence of restriction of supply and the temporary cost burdens by the Thai floods in the same period of the previous year and the increase in overseas sales. For the same reasons, operating income increased to 13,498 million yen (up by 2.5 times y/y).

[Plumbing fixtures business]

With the sales activities of new products, sales increased by 6.9% year-on-year to 190,270 million yen, and operating income increased by 45.1% year-on-year to 7,456 million yen, offsetting the price decline caused by intensified market condition.

[Other building materials and equipment business]

Sales increased by 10.5% year-on-year to 98,441 million yen, and operating income increased by 28.9% year-on-year to 2,820 million yen. This is because of expansion of product-offerings, sales promotion activities and other efforts progressed successfully, offsetting the price hike of materials.

[Distribution and retail business]

With the efforts of enforcing the renovation business, continuously opening new stores, and improving store efficiency, sales increased by 7.8% year-on-year to 93,781 million yen, and operating income increased by 3 times year-on-year to 1,497 million yen.

[Housing, real estate, and other business]

Sales increased by 8.1% year-on-year to 30,850 million yen, and operating income increased by 31.1% year-on-year to 2,778 million yen due to enhanced order receiving and sales activities.

Figures for segment sales and operating income are calculated before eliminating intersegment transactions and corporate allocation. As a result, total consolidated net sales and operating income do not equal the sum of the respective segment figures.

(2) Qualitative information regarding the consolidated financial position

Total assets at September 30, 2013 increased by 112,413 million yen from the end of previous fiscal year to 1,578,102 million yen. This was due to effects from new consolidation, increase in accounts receivable from foreign exchange conversion, and an increase of inventories caused by the seasonal factors. Net assets were 593,498 million yen. The capital adequacy ratio was 37.2%.

Cash flow was as follows:

During the six months ended September 30, 2013, cash flows from operating activities amounted to an inflow of 29,071 million yen, an increase of 20,926 million yen year-on-year. This was due to the improvement of net income before income taxes and minority interests for the period. Also, there were accrued cost of early retirement benefits and decrease in provision for loss on disaster at the same period of the previous fiscal year.

Investing activities used net cash of 62,526 million yen due to capital expenditures and stock acquisition of subsidiaries with change in consolidation. Net outflow increased by 91,470 million yen compared to the same period of the previous fiscal year.

Financing activities provided net cash of 34,080 million yen as a result of dividend payment and repayment and rise of interest-bearing debt. Net inflow increased by 79,995 million yen compared to the same period of the previous fiscal year.

As a result, cash and cash equivalents including the impact from foreign exchange rate fluctuations for the six months ended September 30, 2013 increased by 3,532 million yen from the end of previous fiscal year to 118,194 million yen.

(3) Qualitative information regarding the forecast of consolidated operating performance

There is no change from the fiscal year forecast regarding "The revision of the forecast on business performance and dividend payment for the fiscal year ending March 2014" announced on October 21, 2013.

2. Others

(1) Changes in significant subsidiaries during this quarter:

Since total shares of ASD Americas Holding Corp. was acquired during 1H, the company and its 19 subsidiaries has been added to the scope of consolidation.

3. Consolidated financial statements**(1) Consolidated quarterly balance sheets**

(Unit: million yen)

| | End of previous FY As of March 31, 2013 | End of 1H (As of September 30, 2013) |
|--|--|---|
| Assets: | | |
| Current assets | Y 785,624 | Y 826,986 |
| Cash & deposits | 116,946 | 120,354 |
| Notes and accounts receivable-trade | 387,451 | 411,396 |
| Securities | 7,269 | 1,999 |
| Merchandise and finished goods | 115,143 | 139,264 |
| Work in process | 17,094 | 16,914 |
| Raw materials and supplies | 40,797 | 42,202 |
| Other inventories | 16,524 | 16,966 |
| Short-term loans receivable | 10,655 | 8,303 |
| Deferred tax assets | 24,293 | 25,853 |
| Other | 54,914 | 48,984 |
| Allowance for doubtful accounts | -5,468 | -5,254 |
| Noncurrent assets | 680,064 | 751,115 |
| Property, plant and equipment | 464,913 | 478,883 |
| Buildings & structures | 480,125 | 488,053 |
| Accumulated depreciation | -306,487 | -314,448 |
| Building and structures, net | 173,637 | 173,604 |
| Machinery, equipment and vehicles | 314,411 | 331,396 |
| Accumulated depreciation | -247,244 | -254,717 |
| Machinery, equipment and vehicles, net | 67,166 | 76,678 |
| Land | 188,802 | 189,333 |
| Lease assets | 15,759 | 17,291 |
| Accumulated depreciation | -7,791 | -9,154 |
| Lease assets, net | 7,967 | 8,137 |
| Construction in progress | 12,799 | 16,235 |
| Other | 92,052 | 94,826 |
| Accumulated depreciation | -77,511 | -79,932 |
| Other, net | 14,540 | 14,893 |
| Intangible assets | 79,840 | 129,965 |
| Goodwill | 34,588 | 75,435 |
| Other | 45,251 | 54,530 |
| Investments and other assets | 135,311 | 142,266 |
| Investment securities | 52,963 | 66,082 |
| Long-term loans receivable | 3,111 | 3,020 |
| Deferred tax assets | 32,927 | 30,382 |
| Other | 63,745 | 60,664 |
| Allowance for doubtful accounts | -17,436 | -17,883 |
| Total assets | Y 1,465,689 | Y 1,578,102 |

(Unit: million yen)

| | End of previous FY As of March 31, 2013 | End of 1H (As of September 30, 2013) |
|---|--|---|
| Liabilities: | | |
| Current liabilities | Y 551,108 | Y 628,176 |
| Notes and accounts payable - trade | 201,076 | 208,292 |
| Short-term loans payable | 91,778 | 168,866 |
| Current portion of bonds | 5,000 | 20,000 |
| Lease obligations | 3,428 | 3,250 |
| Accrued expenses | 70,330 | 73,161 |
| Income taxes payable | 7,612 | 6,859 |
| Provision for bonuses | 19,494 | 21,257 |
| Allowance for loss on factory restructuring | 372 | 665 |
| Reserve for loss on showroom integration | 1,540 | 1,046 |
| Asset retirement obligations | 689 | 339 |
| Other | 149,785 | 124,437 |
| Noncurrent liabilities | 348,268 | 356,426 |
| Bonds payable | 35,000 | 20,000 |
| Long-term loans payable | 226,209 | 233,432 |
| Lease obligations | 5,863 | 6,040 |
| Provision for retirement benefits | 12,749 | - |
| Provision for directors' retirement benefits | 276 | 203 |
| Net defined benefit liability | - | 24,619 |
| Deferred tax liabilities | 18,407 | 21,063 |
| Negative goodwill | 185 | 123 |
| Asset retirement obligations | 6,149 | 6,484 |
| Other | 43,427 | 44,459 |
| Total liabilities | 899,377 | 984,603 |
| Net assets: | | |
| Shareholders' equity | | |
| Capital stock | 68,121 | 68,121 |
| Capital surplus | 261,366 | 261,366 |
| Retained earnings | 259,851 | 266,674 |
| Treasury stock | -41,753 | -41,772 |
| Total shareholders' equity | 547,585 | 554,390 |
| Accumulated other comprehensive income | | |
| Valuation difference on available-for-sale securities | 11,009 | 16,391 |
| Deferred gains or losses on hedges | 714 | 873 |
| Foreign currency translation adjustment | 1,850 | 15,449 |
| Total accumulated other comprehensive income | 13,574 | 32,714 |
| Subscription rights to shares | 676 | 1,567 |
| Minority interests | 4,475 | 4,826 |
| Total net assets | 566,312 | 593,498 |
| Total liabilities and net assets | Y 1,465,689 | Y 1,578,102 |

(2) Consolidated quarterly statements of income
(Six-months results)

(Unit: million yen)

| | Six months ended September 30, 2012 | Six months ended September 30, 2013 |
|---|--|--|
| Net Sales | Y 682,917 | Y 741,512 |
| Cost of Sales | 491,489 | 535,114 |
| Gross profit | 191,428 | 206,398 |
| Selling, General & Administrative Expenses | 177,664 | 180,431 |
| Operating income | 13,764 | 25,966 |
| Non-Operating Income | 7,785 | 10,630 |
| Interest income | 956 | 895 |
| Dividends income | 560 | 804 |
| Rent income | 3,435 | 3,354 |
| Amortization of negative goodwill | 61 | 61 |
| Equity in earnings of affiliates | - | 143 |
| Foreign exchange gains | - | 2,255 |
| Other | 2,772 | 3,114 |
| Non-Operating Expenses | 9,073 | 7,645 |
| Interest expenses | 2,472 | 2,051 |
| Equity in losses of affiliates | 4 | - |
| Foreign exchange losses | 827 | - |
| Cost of lease revenue | 2,244 | 2,250 |
| Loss on valuation of derivatives | 70 | 53 |
| Other | 3,453 | 3,289 |
| Ordinary income | 12,476 | 28,951 |
| Extraordinary income | 12,265 | 73 |
| Gain on sales of noncurrent assets | 295 | 64 |
| Gain on sales of investment securities | 7 | 9 |
| Gain on sales of subsidiaries and affiliates' stocks | 2,338 | 0 |
| Gain on bargain purchase | 34 | - |
| Insurance income | 9,590 | - |
| Extraordinary Loss | 39,912 | 2,288 |
| Loss on sales and retirement of noncurrent assets | 2,140 | 850 |
| Loss on valuation of investment securities | 3 | - |
| Loss on valuation of stocks of subsidiaries and affiliates | 77 | - |
| Loss on factory restructurings | 247 | 423 |
| Loss on showroom integration | 918 | - |
| Impairment loss | 2,593 | 1,015 |
| Loss on disaster | 1,245 | - |
| Early retirement related loss | 32,684 | - |
| Income (loss) before income taxes and minority interests | -15,169 | 26,736 |
| Income taxes-current | 6,169 | 6,124 |
| Income taxes-deferred | -10,397 | 3,164 |
| Total income taxes | -4,228 | 9,289 |
| Income (loss) before minority interests | -10,941 | 17,447 |
| Minority interests in loss | -560 | -330 |
| Net income (loss) | -10,380 | 17,777 |

(3) Consolidated quarterly statements of comprehensive income
(Six-months results)

(Unit: million yen)

| | Six months ended September 30, 2012 | Six months ended September 30, 2013 |
|--|--|--|
| Income (loss) before minority interests | -10,941 | 17,447 |
| Other comprehensive income | | |
| Valuation difference on available-for-sale securities | -1,698 | 5,366 |
| Deferred gains or losses on hedges | -399 | 163 |
| Foreign currency translation adjustment | -367 | 13,444 |
| Share of other comprehensive income of associates accounted for using equity method | - | 15 |
| Total other comprehensive income | -2,466 | 18,990 |
| Comprehensive income | -13,408 | 36,438 |
| Comprehensive income attributable to owners of the parent | -12,816 | 36,278 |
| Comprehensive income attributable to minority interests | -591 | 159 |

(4) Consolidated quarterly statements of cash flows

(Unit: million yen)

| | Six months ended September 30, 2012 | Six months ended September 30, 2013 |
|---|--|--|
| Operating Activities: | | |
| Income (loss) before income taxes and minority interests | -Y 15,169 | Y 26,736 |
| Depreciation and amortization | 20,715 | 23,182 |
| Impairment loss | 2,593 | 1,015 |
| Amortization of negative goodwill | -61 | -61 |
| Gain on negative goodwill | -34 | - |
| Amortization of goodwill | 2,519 | 2,827 |
| Decrease in allowance for doubtful accounts | -1,177 | -302 |
| Increase (decrease) in allowance for loss on factory restructuring | -227 | 293 |
| Increase (decrease) in Reserve for Loss on showroom integration | 437 | -494 |
| Decrease in provision for loss on disaster | -8,995 | - |
| Decrease in provision for retirement benefits | -769 | - |
| Decrease in debt for retirement benefits | - | -355 |
| Decrease in prepaid pension costs | 512 | - |
| Increase in asset for retirement benefits | - | -342 |
| Insurance income | -9,590 | - |
| Interest and dividends income | -1,516 | -1,700 |
| Interest expenses | 2,472 | 2,051 |
| Foreign exchange losses (gains) | 126 | -10 |
| Equity in losses (earnings) of affiliates | 4 | -143 |
| Gain on sales and valuation of investment securities | -2,263 | -8 |
| Loss on sales and retirement of noncurrent assets | 1,844 | 786 |
| Decrease in notes and accounts receivable-trade | 18,347 | 7,809 |
| Increase in inventories | -8,031 | -10,562 |
| Decrease in notes and accounts payable-trade | -24,086 | -6,893 |
| Other, net | 36,862 | -12,300 |
| Subtotal | 14,509 | 31,525 |
| Proceeds from insurance income | 510 | 4,020 |
| Interest and dividends income received | 1,457 | 1,701 |
| Interest expenses paid | -2,424 | -2,081 |
| Income taxes paid | -5,906 | -6,093 |
| Net cash provided by operating activities | 8,145 | 29,071 |
| Investing Activities: | | |
| Decrease in time deposits | 45,705 | 407 |
| Purchase of securities | -208,421 | -98,997 |
| Proceeds from sales and redemption of securities | 208,922 | 104,421 |
| Purchase of property, plant and equipment and intangible assets | -30,507 | -34,838 |
| Proceeds from sales of property, plant and equipment and intangible assets | 1,072 | 374 |
| Purchase of investment securities | -1,430 | -5,104 |
| Proceeds from sales and redemption of investment securities | 172 | 24 |
| Proceeds from sales of investments in subsidiaries | 10,482 | - |
| Purchase of investments in subsidiaries resulting in change in scope of consolidation | - | -30,417 |
| Decrease in short-term loans receivable | 3,844 | 1,738 |
| Payments of long-term loans receivable | -276 | -161 |
| Collection of long-term loans receivable | 511 | 1,222 |
| Other payments | -1,676 | -1,535 |
| Other proceeds | 546 | 339 |
| Net cash provided by (used in) investing activities | 28,944 | -62,526 |

(Unit: million yen)

| | Six months ended September 30, 2012 | Six months ended September 30, 2013 |
|--|--|--|
| Financing Activities: | | |
| Increase (decrease) in short-term bank loans and commercial papers | -50,774 | 53,895 |
| Increase (decrease) in liquidation of receivables of trade among the consolidated companies | 1 | -18,998 |
| Repayment of long-term loans payable | -7,336 | -17,341 |
| Proceeds from long-term loans payable | 20,000 | 44,500 |
| Repayments of lease obligations | -1,909 | -2,470 |
| Redemption of bonds | -75 | -19,698 |
| Proceeds from stock issuance to minority shareholders | - | 26 |
| Proceeds from disposal of treasury stock | 0 | 0 |
| Purchase of treasury stock | -6 | -18 |
| Cash dividends paid | -5,815 | -5,815 |
| Cash dividends paid to minority shareholders | -0 | -0 |
| Net cash provided by (used in) financing activities | -45,915 | 34,080 |
| Effect of exchange rate change on cash and cash equivalents | -276 | 2,537 |
| Net increase (decrease) in cash and cash equivalents | -9,102 | 3,162 |
| Cash and cash equivalents at beginning of period | 127,350 | 114,661 |
| Increase in cash and cash equivalents from newly consolidated subsidiaries | 160 | 6 |
| Increase in cash and cash equivalents resulting from merger with unconsolidated subsidiaries | 7 | 371 |
| Decrease in cash and cash equivalents resulting from exclusion of subsidiaries from consolidation | - | -7 |
| Cash and cash equivalents at end of period | 118,416 | 118,194 |

(5) Notes on premise of going concern

Not applicable.

(6) Notes to significant changes in equity

Not applicable.

(7) Segment information

Business Segment Information

(Unit: million yen)

| | For the six months ended September 30, 2012 (April 1, 2012 through September 30, 2012) | | | | | | | |
|---|--|----------------------------|---|----------------------------------|----------------------------------|-----------|---------------------------|---------------|
| | Metal building material business | Plumbing fixtures business | Other building materials and equipment business | Distribution and retail business | Housing and real estate business | Total | Elimination or common use | Consolidation |
| I. Net sales | | | | | | | | |
| (1) Net sales to outside customers | Y 304,102 | Y 176,197 | Y 88,086 | Y 86,515 | Y 28,015 | Y 682,917 | - | Y 682,917 |
| (2) Inter-segment sales of products | 2,039 | 1,810 | 1,027 | 511 | 535 | 5,924 | -5,924 | - |
| Total | 306,142 | 178,008 | 89,113 | 87,026 | 28,551 | 688,841 | -5,924 | 682,917 |
| Segment income (loss)/ Operating income (loss) | 5,471 | 5,137 | 2,187 | 492 | 2,119 | 15,407 | -1,643 | 13,764 |

(Unit: million yen)

| | For the six months ended September 30, 2013 (April 1, 2013 through September 30, 2013) | | | | | | | |
|---|--|----------------------------|---|----------------------------------|----------------------------------|-----------|---------------------------|---------------|
| | Metal building material business | Plumbing fixtures business | Other building materials and equipment business | Distribution and retail business | Housing and real estate business | Total | Elimination or common use | Consolidation |
| I. Net sales | | | | | | | | |
| (1) Net sales to outside customers | Y 331,628 | Y 188,395 | Y 97,420 | Y 93,715 | Y 30,352 | Y 741,512 | - | Y 741,512 |
| (2) Inter-segment sales of products | 1,875 | 1,875 | 1,021 | 65 | 497 | 5,335 | -5,335 | - |
| Total | 333,504 | 190,270 | 98,441 | 93,781 | 30,850 | 746,847 | -5,335 | 741,512 |
| Segment income (loss)/ Operating income (loss) | 13,498 | 7,456 | 2,820 | 1,497 | 2,778 | 28,052 | -2,085 | 25,966 |