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| Company name   | AEON CO., LTD.                                                    |
| Listings       | TSE PRIME of Tokyo Stock Exchange                                 |
| Security code  | 8267                                                              |
| URL            | <a href="https://www.aeon.info/en/">https://www.aeon.info/en/</a> |
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AEON Monthly Operating Performance of Major Consolidated Companies in July 2026

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| <b>July Sales Trends:</b><br>•We would like to express our heartfelt sympathies to all those affected by the 2026 Kumamoto Earthquake that occurred on July 28. We would also like to express our deepest condolences to those who lost their lives in the explosion accident at AEON Mall Kumamoto and the ceiling collapse accident at AEON Mall Uki, and sincerely apologize to the bereaved families and to those who were injured. Currently, some facilities and stores are temporarily closed or operating with revised business hours. For further details, please refer to the websites listed in Note 1. We are currently assessing the impact on our financial results, and if any matter requiring disclosure arises, we will promptly disclose it.<br>•In July, temperatures across Japan remained above seasonal norms. In conjunction with seasonal events such as fireworks displays and summer festivals held nationwide, the Group expanded assortments of products designed to address extreme heat and summer leisure demand. In TOPVALU, reflecting the abundant supply of glass eels, prices of products including TOPVALU Grilled Eel were revised for the Day of the Ox and offered at more attractive price points. The Group also strengthened offerings of products that allowed customers to enjoy different eel flavors and preparations, including shirayaki and tasting sets featuring both kabayaki and shirayaki, successfully capturing seasonal demand.<br>•In the Developer and Entertainment Business, AEON Mall strengthened customer traffic initiatives during the summer holiday period amid extreme heat conditions, resulting in same-store specialty store sales growth of 104.9% year on year. In addition, AEON Mall opened AEON Mall Da Nang Thanh Khe in Da Nang, Vietnam, on July 3 and continues to accelerate expansion in growth markets. AEON Entertainment also established a local subsidiary in Indonesia following Vietnam and commenced business operations centered on the distribution of Japanese content.<br>•In the General Merchandise Store Business at AEON Retail, large-scale promotional campaigns featuring value-added volume offers on daily necessities, expanded sales of e-commerce exclusive products, and large-format merchandise performed well, and same-store sales exceeded the previous year's level. In Food, fresh produce, livestock products, and seafood remained solid and continued to contribute to increased customer visit frequency and differentiation. In Home and Leisure, air conditioners, electric fans, and other products designed to address extreme summer temperatures performed strongly. In Health & Beauty Care, prescription dispensing services and insect repellents, together with expanded assortments of sunscreen and heatstroke-prevention products, drove sales growth.<br>•In the Supermarket Business, while same-store sales were affected by the absence of the boost from stockpiled rice sales recorded in the previous year, sales of fresh foods and deli products remained solid. MaxValu Tokai opened three urban small-format stores in Nagoya City, bringing the cumulative total to 12 locations and further strengthening its dominant-area strategy. AEON Food Style opened Food Style Funabori, its first large-format store in Tokyo, where deli sections featuring popular products from U.S.M.H. Group companies were well received by customers.<br>•In the Discount Store Business, AEON BIG opened The Big Konandai Store, its first location in Yokohama City. In an area where many price-oriented retail chains are concentrated, The Big Konandai Store has leveraged The Big's private-brand products, competitively priced fresh foods and deli offerings, and a broad merchandise assortment. Since opening, the store has continued to generate sales above plan. |
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(Note1) AEON CO., LTD website: <https://www.aeon.info/en/ir/>, AEON KYUSHU CO., LTD.website: <https://www.aeon-kyushu.info/> (only Japanese) (Unit : %)

| FY2026                    | YoY sales   | March | April | May   | June  | July  | August | September | October | November | December | January | February |
|---------------------------|-------------|-------|-------|-------|-------|-------|--------|-----------|---------|----------|----------|---------|----------|
| AEON RETAIL CO., LTD.     | All stores  | 102.6 | 102.8 | 107.3 | 96.2  | 103.2 |        |           |         |          |          |         |          |
|                           | Same stores | 100.5 | 100.9 | 105.9 | 94.8  | 101.5 |        |           |         |          |          |         |          |
| AEON MALL CO., LTD.       | All stores  | 105.9 | 107.6 | 113.5 | 99.7  | 106.2 |        |           |         |          |          |         |          |
|                           | Same stores | 104.6 | 106.5 | 112.5 | 98.6  | 104.9 |        |           |         |          |          |         |          |
| AEON Hokkaido Corporation | All stores  | 102.2 | 100.9 | 103.8 | 99.4  | 100.6 |        |           |         |          |          |         |          |
|                           | Same stores | 102.6 | 101.4 | 104.3 | 99.8  | 101.0 |        |           |         |          |          |         |          |
| AEON KYUSHU CO., LTD.     | All stores  | 101.7 | 101.5 | 104.8 | 98.5  | 101.6 |        |           |         |          |          |         |          |
|                           | Same stores | 100.8 | 100.2 | 103.4 | 96.8  | 100.4 |        |           |         |          |          |         |          |
| CAN DO CO., LTD.          | All stores  | 103.6 | 103.4 | 104.3 | 101.0 | 101.2 |        |           |         |          |          |         |          |
|                           | Same stores | 101.8 | 103.9 | 106.0 | 100.5 | 102.9 |        |           |         |          |          |         |          |
| Maxvalu Tokai Co., Ltd.   | All stores  | 100.4 | 98.3  | 102.5 | 100.8 | 100.2 |        |           |         |          |          |         |          |
|                           | Same stores | 99.7  | 97.2  | 101.2 | 99.3  | 98.8  |        |           |         |          |          |         |          |
| FUJI CO.,LTD              | All stores  | 97.1  | 95.7  | 99.9  | 94.2  | 95.8  |        |           |         |          |          |         |          |
|                           | Same stores | 99.5  | 98.8  | 103.3 | 97.5  | 99.3  |        |           |         |          |          |         |          |
| MINISTOP CO., LTD.        | All stores  | 93.5  | 89.6  | 93.7  | 89.2  | 92.4  |        |           |         |          |          |         |          |
|                           | Same stores | 95.9  | 92.2  | 96.8  | 91.6  | 95.5  |        |           |         |          |          |         |          |
| COX CO., LTD.             | All stores  | 100.2 | 99.1  | 103.9 | 85.3  | 96.8  |        |           |         |          |          |         |          |
|                           | Same stores | 97.7  | 96.8  | 103.4 | 83.0  | 93.8  |        |           |         |          |          |         |          |

- \*Figures above are based on each company's disclosure policy.
- \*1. All-store and same-store year-on-year sales of the above companies were calculated excluding the impact of the application of “Accounting Standard for Revenue Recognition (ASBJ Statement No. 29)”
- \*2. For CAN DO CO., Ltd., both all-store and same-store sales YoY comparisons are computed after applying the revenue recognition standard mentioned above.
- \*3. AEON KYUSHU CO., LTD. merged with Joyful Sun Co., Ltd. effective March 1, 2026.
- \*4. MV Kanto, a subsidiary of United Super Markets Holdings Inc. acquired the Kanto business of Daiei, Inc. through an absorption-type company split and merged with AEON MARKET CO., LTD. effective March 1, 2026.
- \*5. The results of United Super Markets Holdings Inc. and AEON Fantasy Co., LTD. and TSURUHA HOLDINGS INC.will be announced on the AEON website at a later date. <https://www.aeon.info/ir/library/monthly/>
- \*6. The figures for AEON MALL CO., LTD. represent the sales performance of tenants operating within the shopping centers.
- «Year-over-year weekday rotation»
- ① Weekends:Sat. ±0day, Sun ±0day. National holidays: This year; July 20th (Mon.) , Last year; July 21th (Mon.).
- ② Customer gratitude day: This year ; July 20th (Mon.), 30th (Thu.) , Last year ; July 20th (Sun.), 30th (Wed.).

<Reference material: Segment information (preliminary version)> (Unit : %)

| FY2026                                       | YoY sales/Number of customers | March | April | May   | June | July | August | September | October | November | December | January | February |
|----------------------------------------------|-------------------------------|-------|-------|-------|------|------|--------|-----------|---------|----------|----------|---------|----------|
| The General Merchandise Store (GMS) Business | Same stores                   | 100.8 | 100.9 | 105.2 | 95.9 |      |        |           |         |          |          |         |          |
|                                              | Number of customers           | 100.4 | 99.4  | 102.6 | 96.5 |      |        |           |         |          |          |         |          |
| The Supermarket Business                     | Same stores                   | 99.8  | 98.7  | 101.6 | 98.0 |      |        |           |         |          |          |         |          |
|                                              | Number of customers           | 99.6  | 97.9  | 100.1 | 96.3 |      |        |           |         |          |          |         |          |
| The Discount Store Business                  | Same stores                   | 97.2  | 99.0  | 101.7 | 95.5 |      |        |           |         |          |          |         |          |
|                                              | Number of customers           | 100.0 | 100.5 | 101.6 | 96.4 |      |        |           |         |          |          |         |          |
| The Health and Wellness Business             | Same stores                   | 103.6 | 106.2 | 105.8 | 99.0 |      |        |           |         |          |          |         |          |
|                                              | Number of customers           | 100.7 | 103.4 | 104.7 | 95.9 |      |        |           |         |          |          |         |          |
| Shopping Center Development Business         | Same stores                   | 104.5 | 106.3 | 112.4 | 98.2 |      |        |           |         |          |          |         |          |
|                                              | Number of customers           | 101.9 | 103.3 | 107.7 | 97.8 |      |        |           |         |          |          |         |          |
| Entertainment Business                       | Same stores                   | 113.9 | 117.8 | 113.6 | 94.3 |      |        |           |         |          |          |         |          |
|                                              | Number of customers           | 118.2 | 115.8 | 111.2 | 79.8 |      |        |           |         |          |          |         |          |
| Services & the Specialty Store Business      | Same stores                   | 99.2  | 101.3 | 107.5 | 96.4 |      |        |           |         |          |          |         |          |
|                                              | Number of customers           | 97.8  | 101.0 | 106.3 | 97.4 |      |        |           |         |          |          |         |          |

- \*7. The figures for the General Merchandise Store (GMS) Business are sourced from the results of 12 companies, including AEON RETAIL CO., LTD., AEON Hokkaido Corporation, and AEON KYUSHU CO., LTD., among others.
- \*8. The figures for the Supermarket Business are sourced from the results of 13 companies, including The Maruetsu, Inc., KASUMI CO., LTD, Inageya Co., Ltd., MaxValu Tokai Co., Ltd., and FUJI CO., LTD., among others.
- \*9. The figures for the Discount Store Business are sourced from the results of 3 companies, including AEON BIG CO., LTD. and BIG-A CO., LTD., and another company.
- \*10. The figures for the Health and Wellness Business are sourced from the results of 3 companies, WELCIA YAKKYOKU CO., LTD., and others.
- \*11. The figures for the Shopping Center Development Businesss are sourced from the results of specialty store sales in mall-type DV operations of AEON MALL CO., LTD., AEON RETAIL CO., LTD., and AEON Tohoku CO., LTD.
- \*12. The figures for the Services Business (Entertainment Business) are sourced from the results of 5 companies, AEON Fantasy Co., LTD., AEON ENTERTAINMENT CO., LTD., among others.
- Notably, AEON DELIGHT CO., LTD. is excluded from the dataset.The Services & Specialty Store Business and Entertainment Business are now presented separately, with figures from March onward revised accordingly.
- \*13. The figures for Specialty Store Business are sourced from the results of 7 companies including COX CO., LTD., GFOOT CO., LTD., AEON PET CO.,LTD., and Mega Sports Co., LTD. among others.
- \*14. The results of July will be announced on the AEON website at a later date.