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Results

<Consolidated>
Financial Results (Changes from FY2010 1Q)

100 million yen

	FY11 1Q	FY10 1Q	Change		Reference
Net sales	3,767	3,664	103	2.8%	City gas +57 (Decrease in Gas sales volume & Increase in Unit price, including Nijio+50), Other energy +88 (Electric power +74)
Operating income	166	415	-249	-60.0%	City gas -205, Other energy -6 (Energy services -7)
Ordinary income	163	414	-251	-60.5%	Non-operating income/loss -1 (Equity in earnings of affiliates -5, Foreign exchange profit and loss -2, Gain on interest-rate swaps +15)
Net Income	89	252	-163	-64.4%	

Total assets	17,747	18,296	-549	-3.0%	Current assets -436 (Accounts receivable-other -473), Property, plant and equipment & Intangible assets -80 (Capex +255, Amortization -356), Investment and other assets -33
Shareholders' equity	8,354	8,589	-235	-2.7%	Acquisition of treasury stock -210, Dividend payments -120, Valuation difference on stock -16, Net income +89, Foreign currency translation adjustment +28
Shareholders' equity ratio (%)	47.1%	46.9%	0.2	—	Ratio rose as decline in shareholders' equity (-2.7%) was less than decline in total assets (-3.0%)
Total assets turnover (times)	0.21	0.20	0.01	—	
Interest-bearing debt	6,166	5,841	325	5.6%	Tokyo Gas +216, Tokyo Gas Gorgon +83, Tokyo Gas Pluto +28
Net income	89	252	-163	-64.4%	
Depreciation and amortization (*2, 3)	356	352	4	1.3%	Ohgishima Power +3, Tokyo Gas +3
Operating cash flow (*1)	446	604	-158	-26.1%	
Capex (*2)	255	296	-41	-13.7%	Ohgishima Power -65, Tokyo Gas QCLNG +12, Tokyo Gas Gorgon +8, Tokyo Gas Pluto +7
EPS (¥/share)	3.38	9.41	-6.03	-64.1%	Decreased due to decrease in Net income (-163)
BPS (¥/share)	318.96	320.70	-1.74	-0.5%	

Scope of consolidation: 70 in FY11 1Q (Tokyo Gas + 64 subsidiaries + 5 affiliated companies accounted for by the equity-method); 67 in FY10 1Q (Tokyo Gas + 62 subsidiaries + 4 affiliated companies accounted for by the equity-method).

Figures in FY10 1Q show those for the corresponding period of the previous year (P/L items) or those as of the end of the previous period (B/S items).

(*1) Operating cash flow is calculated using the simplified accounting treatment of "Net income + Depreciation and amortization." (simplified accounting treatment; differs from amount in Consolidated Statement of Cash Flows)

(*2) Amounts for capex and depreciation and amortization are after offsetting of internal transactions.

(*3) Depreciation and amortization includes amortization of long-term prepaid expenses.

<Non-consolidated>
Financial Results (Changes from FY2010 1Q)

100 million yen

	FY11	FY10	Change	
Net Sales	3,256	3,177	79	2.5%
Operating income	94	339	-245	-72.0%
Ordinary income	164	407	-243	-59.6%
Net income	114	302	-188	-62.2%

100 million yen

Impact of Sliding System Time Lag

	FY11	FY10	Change
Revenue from sliding system	-6	-113	107
Increase in gas cost	230	7	223
Change	-236	-120	-116

Change from basic price

Economic Frame

	FY11	FY10	Change
JCC \$/bbl	114.96	81.30	33.66
Ex. rate ¥/\$	81.71	92.01	-10.30

100 million yen

	FY11	FY10	Change			
Gas sales	2,679	2,669	10	0.4%	Volume, Composition -94, Unit price +104	
Operating cost	Raw materials and supplies	1,547	1,373	174	12.7%	Volume, Composition -38, Unit price +212 (foreign exchange effect = -159, oil price effect = +258)
	(Gross profit)	(1,132)	(1,296)	(-164)	(-12.7%)	Volume, Composition -56, Unit price -108
	Personnel expenses	246	190	56	29.1%	Expenses from actuarial differences in pension accounting +55, etc.
	General expenses	551	539	12	2.3%	See below
	Depreciation & amortization	259	256	3	1.2%	
	LNG regasification	-11	-8	-3	-	
	Total	2,592	2,351	241	10.3%	
Installation work	Installation work	-5	-4	-1	-	
	Gas appliances	20	24	-4	-19.3%	Gas appliances revenue: fan heater -1, hot plate -1, etc.
Other operation income	15	20	-5	-26.1%		
Supplementary business income	-6	0	-6	-	LNG sales -4, Electric power sales -2, etc.	
Operating income	94	339	-245	-72.0%		
Non operating income	69	68	1	2.3%		
Ordinary income	164	407	-243	-59.6%		
Extraordinary income	-	36	-36	-	FY2010: Extrardinary income from the effect of merger of TG Enterprise Co., Ltd. +36	
Extraordinary loss	-	-	-	-		
Taxes	49	140	-91	-64.6%		
Net income	114	302	-188	-62.2%		

Breakdown of General Expenses 100 million yen

	FY11	FY10	Change		
Repair costs	79	75	4	4.6%	Repair costs for pipes and pipelines +1, Repair costs for production facilities +1, etc.
Expendable costs	33	33	0	0.3%	
Rent	46	50	-4	-7.5%	Rent of buildings and facilities -4, etc.
Consignment costs	157	150	7	4.8%	Pipeline security consignment costs +4, Sales-related consignment costs +1, etc.
Taxes	104	103	1	0.4%	
Marketing costs	47	48	-1	-1.8%	
Others	85	80	5	7.4%	

<Non-consolidated>

Key Indices of Business Activities (Changes from FY2010 1Q)

Number of Customers

Thousands

	FY11	FY10	Change	
Number of customers	10,460	10,354	106	1.0%
Number of new customers	30	35	-5	-15.6%

Non-consolidated Actual Gas Sales Volume

Mil. M3

	FY11	FY10	Change			
Residential vol. per meter (m3)	97.1	103.9	-6.8	-6.5%	Temp. effect -4.2m3 (-4.0%), No. of days +0.1m3 (+0.1%), Other -2.7m3 (-2.6%)	
Residential	858	911	-53	-5.8%	Temp. effect -37 mil.m3 (-4.0%), No. of days +1 mil.m3 (+0.1%), No. of contracts +7 mil.m3 (+0.7%), Other -24 mil.m3 (-2.6%)	
Commercial	Commercial	377	431	-54	-12.5%	
	Other	173	204	-31	-15.2%	
	Commercial total	550	635	-85	-13.3%	Temp. effect ±0 mil.m3 (±0%), Other -85 mil.m3 (-13.3%)
Industrial	Power gen.	541	489	52	10.7%	
	Other	735	732	3	0.4%	
	Industrial total	1,276	1,221	55	4.5%	
	Total	1,826	1,855	-29	-1.6%	
Wholesale	513	510	3	0.5%	Temp. effect -2 mil.m3 (-0.4%), Increase in volume of other gas companies +5 mil.m3 (+0.9%)	
Total	3,197	3,277	-80	-2.4%	Temp. effect -39m3 (-1.2%), Power generation +52 mil.m3 (+1.6%), Industrial (excl. power gen.) +3 mil.m3 (+0.1%), Wholesale (excl. temp. effect) +5 mil.m3 (+0.1%), Other -101 mil.m3 (-3.1%)	
(Large-volume gas demand)	1,514	1,501	13	0.9%		

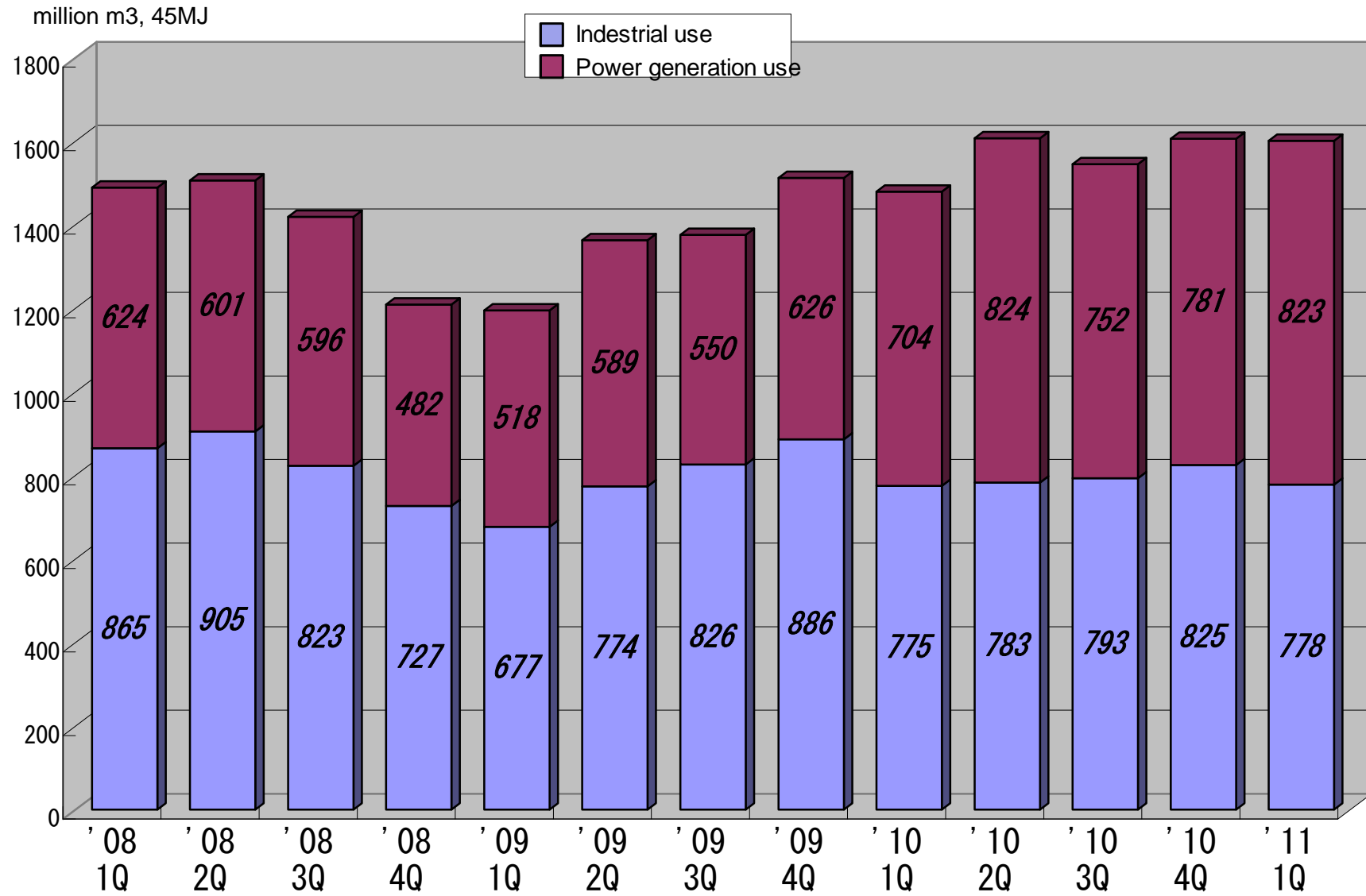
<Non-consolidated>

Trend in Industrial Use Sales Volume (by Industry)

Unit: 100 million m3 45MJ		FY2011 1Q (A)	FY2010 1Q (B)	Changes (A) - (B)	Changes (%)	FY2008 1Q (C)	Changes (A) - (C)	Changes (%)
Industrial use	Food	124	122	2	1.7%	140	-16	-11.9%
	Textile	10	10	0	-0.2%	9	1	4.1%
	Paper & Pulp	42	51	-9	-16.4%	63	-21	-32.2%
	Chemicals	166	167	-1	-0.5%	182	-16	-9.1%
	Glass & ceramics	47	43	4	7.1%	42	5	10.2%
	Steel	126	111	15	13.6%	147	-21	-14.5%
	Non-ferrous Metal	41	41	0	-0.3%	38	3	6.6%
	Metal machinery	74	100	-26	-26.1%	116	-42	-36.1%
	Others	104	88	16	20.5%	94	10	10.4%
Sub-total	734	732	2	0.3%	831	-97	-11.8%	
Power Generation	542	489	53	10.8%	590	-48	-8.0%	
Total	1,276	1,221	55	4.5%	1,422	-146	-10.3%	

Note: Some additions may conflict due to the round off.

<Consolidated> Trend in Industrial Use Sales Volume (Quarterly)



Forecasts

<Non-consolidated>

Oil Price and Currency Forecasts, Temperature and Their Impacts on Gross Profit

Economic Frame

	FY2011 Forecast (Current)			
	1st Half	2nd Half	Full-year	
JCC	112.48	110.00	111.24	\$/bbl
Ex. Rate	80.86	80.00	80.43	¥/\$
	FY2011 Initial Forecast as of Apr. 28			
	1st Half	2nd Half	Full-year	
JCC	112.50	120.00	116.25	\$/bbl
Ex. Rate	85.00	85.00	85.00	¥/\$
	Change			
	1st Half	2nd Half	Full-year	
JCC	-0.02	-10.00	-5.01	\$/bbl
Ex. Rate	-4.14	-5.00	-4.57	¥/\$

Profit Sensitivity to Changes in Oil Price

100 million yen

1\$/bbl	2Q	3Q	4Q	Full-year
Net sales	-13	-5	-2	-20
Gas resource cost	-14	-15	-4	-33
Gross profit	1	10	2	13

* Impact on profit by JCC decrease by \$1/bbl

Profit Sensitivity to Changes in EX Rate

100 million yen

¥1/\$	2Q	3Q	4Q	Full-year
Net sales	-21	-19	-6	-46
Gas resource cost	-20	-21	-21	-62
Gross profit	-1	2	15	16

* Impact on Profit by a 1-yen appreciation

<Consolidated> Financial Results Forecast (Current vs Initial Forecast)

Forecast for Full Year

100 million yen Forecast for 2Q

100 million yen

	Forecast for Full Year		Change		Reference	Forecast for 2Q		Change	
	FY11	FY11Initial				FY11	FY11Initial		
Net sales	17,050	17,520	-470	-2.7%	City gas -455 (Decrease in unit price due to gas rate adjustment system)	7,500	7,530	-30	-0.4%
Operating income	610	570	40	7.0%	Gain on city gas +51 (Decrease in resource costs, etc.)	20	90	-70	-77.8%
Ordinary income	580	520	60	11.5%	Non-operating income/loss +20 (Foreign exchange income, etc)	10	60	-50	-83.3%
Net Income	370	330	40	12.1%		-20	20	-40	-
Total assets	18,750	18,710	40	0.2%					
Shareholders' equity	8,370	8,330	40	0.5%	Increase in retained earnings +40 (Increase in net income)				
Shareholders' equity ratio (%)	44.6%	44.5%	0.1	-	Increased due to increase in shareholders' equity following increase in retained earnings				
Total assets turnover (times)	0.93	0.95	-0.02	-	Decreased due to decrease in net sales (-2.7%)				
ROA (*2) (%)	2.0%	1.8%	0.2	-	ROA increased due to increase in net income (+12.1%)				
ROE (*2) (%)	4.4%	3.9%	0.5	-	ROE increased due to increase in net income (+12.1%)				
Interest-bearing debt	6,120	6,160	-40	-0.6%	Tokyo Gas -25				
D/E ratio	0.73	0.74	-0.01	-					
Net income	370	330	40	12.1%					
Depreciation and amortization (*3, 4)	1,500	1,500	0	-					
Operating cash flow (*1)	1,870	1,830	40	2.2%					
Capex (*3)	1,600	1,670	-70	-4.2%	TGQCLNG -75				
TEP	-43	-82	39	-	Increased due to increase in ordinary income (+11.5%)				
(WACC)	3.2%	3.2%	-	-					
EPS (¥/share)	14.21	12.32	1.89	15.3%	Increased due to increase in net income (+12.1%)				
BPS (¥/share)	323.82	321.77	2.05	0.6%	Increased due to increase in shareholders' equity following increase in retained earnings				
Total payout ratio (*5) (%)	(*6) -	-	-	-					

Scope of consolidation: 70 in FY11 (Tokyo Gas + 64 subsidiaries + 5 affiliated companies accounted for by the equity-method)

(*1) Operating cash flow is calculated using the simplified accounting treatment of "Net income + Depreciation and amortization." (simplified accounting treatment; differs from amount in Consolidated Statement of Cash Flows)

(*2) Total assets and shareholders' equity used to calculate ROA and ROE are the average of the amount as of the end of the previous term and the amount as of the end of the current term.

(*3) Amounts for capex and depreciation and amortization are after offsetting of internal transactions.

(*4) Depreciation and amortization includes amortization of long-term prepaid expenses.

(*5) FYn Gross payout ratio = (FYn dividend amount on profit disposal basis) + (FYn+1 stock repurchases) / (FYn consolidated net income)

(*6) Gross payout ratio target set at 60% under current Medium-term Mgt. Plan (FY2009-FY2013).

<Non-consolidated>

Financial Results Forecast (Current vs Initial Forecast)

Forecast for 1st Half

100 million yen

	FY11	FY11Initial	Change	
Net Sales	6,530	6,580	-50	-0.8%
Operating income	-90	-10	-80	-
Ordinary income	-20	50	-70	-
Net income	-10	30	-40	-

100 million yen

Impact on Sliding System Time Lag

	FY11	FY11Initial	Change	
Revenue from sliding system	183	282	-99	
Increase in gas cost	603	688	-85	
Change	-420	-406	-14	

Economic Frame

	FY11	FY11Initial	Change	
JCC \$/bbl	112.48	112.5	-0.02	
Ex. rate ¥/\$	80.86	85.00	-4.14	

100 million yen

	FY11	FY11Initial	Change			
Gas sales	5,170	5,210	-40	-0.8%	Volume, Composition +57, Unit price -97	
Operating cost	Raw materials and supplies	3,193	3,219	-26	-0.8%	Volume, Composition +48, Unit price -74 (foreign exchange effect = -138, oil price effect = +71)
	(Gross profit)	(1,977)	(1,991)	(-14)	(-0.7%)	Volume, Composition +9, Unit price -23
	Personnel expenses	486	486	0	0.0%	
	General expenses	1,098	1,026	72	7.0%	See below
	Depreciation & amortization	525	525	0	0.0%	
	LNG regasification	-22	-20	-2	10.0%	
	Total	5,280	5,236	44	0.8%	
Installation work	-7	-6	-1	-		
Gas appliances	37	39	-2	-5.1%	Other miscellaneous, Decline in earnings from overcompensation -1, etc.	
Other operation income	30	33	-3	-9.1%		
Supplementary business income	-10	-17	7	-	Electric power sales +10, etc.	
Operating income	-90	-10	-80	-		
Non operating income	70	60	10	16.7%	Decrease in interest expenses +4, etc.	
Ordinary income	-20	50	-70	-		
Extraordinary income	-	-	-	-		
Extraordinary loss	-	-	-	-		
Taxes	-10	20	-30	-		
Net income	-10	30	-40	-		

Breakdown of General Expenses

	FY11	FY11Initial	Change		
Repair costs	166	151	15	9.9%	Repair costs for pipes and pipelines +6 (inflow from previous year caused by earthquake, restoration and repair), Repair costs for gas fixtures +4, etc.
Expendable costs	70	59	11	18.6%	Gas meters +9 (accelerated execution), etc.
Rent	90	89	1	1.1%	
Consignment costs	312	296	16	5.4%	System-related consignment costs (accelerated execution) +5
Taxes	205	205	0	0.0%	
Marketing costs	87	70	17	24.3%	Marketing commissions (safty patrols, etc.) +9, Event promotion costs (accelerated execution) +3, etc.
Others	168	156	12	7.7%	Asset retirement expenses for pipes (inflow from previous year caused by earthquake, restoration and repair) +3, Asset retirement expenses for supply pipes (debris inflow from earthquake, restoration and repair) +3, etc.

<Non-consolidated>

Key Indices of Business Activities (Current vs Initial Forecast)

Forecast for 1st Half

Number of Customers

Thousands

	FY11	FY11Initial	Change	
Number of customers	10,481	10,488	-7	-0.1%
Number of new customers	69	76	-7	-9.3%

Breakdown of Gas Sales Volume

Mil. m3

	FY11	FY11Initial	Change			
Residential vol. per meter (m3)	146.5	144.9	1.6	1.1%	Temp. effect +2.9m3 (+2.0%), No. of days -0.1m3 (-0.1%), Other -1.2m3 (-0.8%)	
Residential	1,297	1,285	12	0.9%	Temp. effect +26 mil.m3 (+2.0%), No. of days -1 mil.m3 (-0.1%), No. of contracts -1 mil.m3 (-0.1%), Other -12 mil.m3 (-0.9%)	
Commercial	Commercial	834	904	-70	-7.7%	
	Public & Medical	424	487	-63	-12.9%	
	Commercial total	1,258	1,391	-133	-9.6%	Temp. effect ±0 mil.m3 (±0%), Other -133 mil.m3 (-9.6%)
Industrial	Power gen.	1,153	940	213	22.6%	
	Other	1,526	1,477	49	3.3%	
	Industrial total	2,679	2,417	262	10.8%	
	Total	3,937	3,808	129	3.4%	
Wholesale	1,028	1,052	-24	-2.3%	Temp. effect -2m3 (-0.1%) , Increase in volume of other gas companies -22 mil.m3 (-2.2%)	
Total	6,262	6,144	118	1.9%	Temp. effect +24 mil.m3 (+0.4%), Power generation +213 mil.m3 (+3.4%), Industrial (excl. power gen.) +49 mil.m3 (+0.8%) , Wholesale (excl. temp. effect) -22 mil.m3 (-0.3%), Other -146 mil.m3 (-2.4%)	
(Large-volume gas demand)	3,274	3,085	190	6.1%		

<Non-consolidated>

Financial Results Forecast (Current vs Initial Forecast)

Forecast for Full Year

100 million yen

	FY11	FY11Initial	Change	
Net Sales	14,920	15,390	-470	-3.1%
Operating income	370	330	40	12.1%
Ordinary income	430	380	50	13.2%
Net income	300	270	30	11.1%

Impact of Sliding System Time Lag

	FY11	FY11Initial	Change
Revenue from sliding system	957	1,365	-408
Increase in gas cost	1,430	1,924	-494
Change	-473	-559	86

Economic Frame

	FY11	FY11Initial	Change
JCC \$/bbl	111.24	116.25	-5.01
Ex. rate ¥/\$	80.43	85.00	-4.57

Change from basic price

100 million yen

	FY11	FY11Initial	Change			
Gas sales	11,930	12,400	-470	-3.8%	Volume, Composition -56, Unit price -414	
Operating cost	Raw materials and supplies	7,189	7,704	-515	-6.7%	Volume, Composition -20, Unit price -495 (foreign exchange effect = -370, oil price effect = -143)
	(Gross profit)	(4,741)	(4,696)	(45)	(1.0%)	Volume, Composition -36, Unit price -81
	Personnel expenses	978	978	0	0.0%	
	General expenses	2,372	2,372	0	0.0%	See below
	Depreciation & amortization	1,096	1,096	0	0.0%	
	LNG regasification	-41	-40	-1	-	
	Total	11,594	12,110	-516	-4.3%	
Installation work	-4	-4	0	-		
Gas appliances	60	60	0	0.0%		
Other operation income	56	56	0	0.0%		
Supplementary business income	-22	-16	-6	-	LNG sales -3, etc.	
Operating income	370	330	40	12.1%		
Non operating income	60	50	10	20.0%	Decrease in interest expenses +4, etc.	
Ordinary income	430	380	50	13.2%		
Extraordinary income	-	-	-	-		
Extraordinary loss	-	-	-	-		
Taxes	130	110	20	18.2%		
Net income	300	270	30	11.1%		

Breakdown of General Expenses

	FY11	FY11Initial	Change		
Repair costs	349	343	6	1.7%	Repair costs for gas fixtures +6, etc.
Expendable costs	142	139	3	2.2%	
Rent	179	179	0	0.0%	
Consignment costs	639	643	-4	-0.6%	System-related -1
Taxes	430	427	3	0.7%	
Marketing costs	252	261	-9	-3.4%	Event promotion etc. -9, etc.
Others	381	380	1	0.3%	

<Non-consolidated>

Key Indices of Business Activities (Current vs Initial Forecast)

Forecast for Full Year

Number of Customers

Thousands

	FY11	FY11Initial	Change	
Number of customers	10,551	10,551	0	0.0%
Number of new customers	173	173	0	0.0%

Breakdown of Gas Sales Volume

Mil. m3

	FY11	FY11Initial	Change			
Residential vol. per meter (m3)	382.5	380.5	2.0	0.5%	Temp. effect +3.0m3 (+0.8%), No. of days -0.4m3 (-0.1%), Other -0.6m3 (-0.2%)	
Residential	3,391	3,378	13	0.4%	Temp. effect +26 mil.m3(+0.8%), No. of days -1 mil.m3 (-0.1%), No. of contracts -1 mil.m3 (-0.1%), Other -11 mil.m3 (-0.2%)	
Commercial	Commercial	1,679	1,813	-134	-7.4%	
	Public & Medical	857	956	-99	-10.4%	
	Commercial total	2,536	2,770	-234	-8.4%	Temp. effect ±0 mil.m3 (±0%), Other -234 mil.m3 (-8.4%)
Industrial	Power gen.	2,215	1,923	292	15.2%	
	Other	3,002	3,067	-65	-2.1%	
	Industrial total	5,217	4,990	227	4.5%	
	Total	7,753	7,760	-7	-0.1%	
Wholesale	2,204	2,233	-29	-1.3%	Temp. effect +3 mil.m3 (+0.1%), Increase in volume of other gas companies -32 mil.m3 (-1.4%)	
Total	13,348	13,371	-23	-0.2%	Temp. effect +29 mil.m3 (+0.2%), Power generation +292 mil.m3 (+2.2%), Industrial (excl. power gen.) -65 mil.m3 (-0.5%)	
(Large-volume gas demand)	4,788	6,262	-1,474	-23.5%	Wholesale (excl. temp. effect) -29 mil.m3 (-0.2%), Other -250 mil.m3 (-1.9%)	

<Non-consolidated> Breakdown of Operating Cash flows/CAPEX

Operating Cash Flows

Results (FY11 1Q vs. FY10 1Q)

100 million yen

	FY11	FY10	Change	
Net income (A)	114	302	-188	-62.2%
Depreciation (B)	270	267	3	1.1%
Operating Cash Flow (A+B)	384	569	-185	-32.5%

1H Forecast (FY11 vs. Initial forecast as of Apr. 28)

100 million yen

	FY11	As of Apr 28	Change	
Net income (A)	-10	30	-40	-133.3%
Depreciation (B)	545	545	0	0.0%
Operating Cash Flow (A+B)	535	575	-40	-7.0%

Fiscal Year Forecast (FY11 vs Initial forecast as of Apr. 28)

100 million yen

	FY11	As of Apr 28	Change	
Net income (A)	300	270	30	11.1%
Depreciation (B)	1,139	1,139	0	0.0%
Operating Cash Flow (A+B)	1,439	1,409	30	2.1%

Breakdown of Capex

Results (FY11 1Q vs. FY10 1Q)

100 million yen

	FY11	FY10	Change	
Production	24	14	10	66.3%
Supply	145	147	-2	-1.5%
Others	13	22	-9	-40.1%
Total	183	184	-1	-0.7%

Production facilities: Ohgishima Plant tank construction +12

Supply facilities: Marketing-related +6, Stable supply-related, etc. -8, etc.

Others: Other facilities, etc. -9

1H Forecast (FY11 vs. Initial forecast as of Apr. 28)

100 million yen

	FY11	As of Apr 28	Change	
Production	95	105	-10	-9.7%
Supply	312	300	12	4.0%
Others	88	87	0	0.5%
Total	495	495	0	0.0%

Production facilities: Other facilities, etc. -10

Supply facilities: Marketing-related, etc. +12

Fiscal Year Forecast (FY11 vs Initial forecast as of Apr. 28)

100 million yen

	FY11	As of Apr 28	Change	
Production	254	252	2	1.2%
Supply	717	702	15	2.1%
Others	252	269	-17	-6.6%
Total	1,223	1,223	0	0.0%

Production facilities: Other facilities, etc. +2

Supply facilities: Marketing-related, etc. +15

Others: Other facilities, etc. -17