



SHINKA!-Advance 2016

SEKISUI CHEMICAL CO., LTD.

# Presentation of Financial Results for the Third Quarter of FY2016

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Director

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30 January, 2017

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## Results for 3Q FY2016 and Forecasts for FY2016

	FY2015				FY2016	3Q		4Q	
	1H	3Q	4Q	2H	1H	Plan (Oct. 2016)	Results	Plan (Oct. 2016)	Forecasts (Assumptions)
Forex Rate *Avg. rate for each term	¥122/US\$ ¥135/€	¥122/US\$ ¥133/€	¥115/US\$ ¥127/€	¥119/US\$ ¥130/€	¥105/US\$ ¥118/€	¥101/US\$ ¥113/€	¥109/US\$ ¥118/€	¥101/US\$ ¥113/€	¥113/US\$ ¥122/€

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## Overview of 3Q FY2016 Results

- Despite a decrease in net sales due mainly to movements in foreign currency exchange rates and the effects of business structural reform, substantial increase in operating income to a record high
- Net sales as well as each level of profit slightly in excess of plans

(Billions of yen)	First 9 months of FY2015	First 9 months of FY2016	Difference
Net Sales	799.7	766.2	-33.4
Operating Income	55.4	61.5	+6.1
Ordinary Income	54.4	63.7	+9.4
Net Income Attributable to Owners of Parent	40.5	39.9	-0.5

## 3Q FY2016 Results Net Sales and Operating Income by Divisional Company

- Increase in profit at all three divisional companies; HPP Company offset the negative impact of movements in foreign currency exchange rates (-7.8 billion yen); results largely driven by a substantial growth in profit at the UIEP Company (1-3Q)

(Billions of yen)	3Q FY2015		3Q FY2016		Difference		First 9 months of FY2015		First 9 months of FY2016		Difference	
	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income
HPP*	94.9	14.4	90.1	14.1	-4.8	-0.3	285.0	39.2	266.8	41.6	-18.2	+2.4
Housing*	102.6	2.9	103.5	2.4	+0.9	-0.4	336.5	19.1	341.2	19.6	+4.7	+0.5
UIEP*	58.2	0.8	58.7	3.5	+0.5	+2.7	165.7	0	170.7	6.7	+5.0	+6.7
Others	9.6	-1.2	0.6	-2.0	-9.0	-0.8	27.2	-2.8	1.9	-5.8	-25.3	-3.1
Eliminations or Unallocatable Accounts	-4.6	0.3	-4.5	-0.2	0	-0.5	-14.7	-0.1	-14.4	-0.6	+0.3	-0.5
<b>Total</b>	<b>260.8</b>	<b>17.2</b>	<b>248.4</b>	<b>17.9</b>	<b>-12.4</b>	<b>+0.7</b>	<b>799.7</b>	<b>55.4</b>	<b>766.2</b>	<b>61.5</b>	<b>-33.4</b>	<b>+6.1</b>

\*HPP: High Performance Plastics Company, Housing: Housing Company, UIEP: Urban Infrastructure & Environmental Products Company

## FY2016 Overview of Revised Plan

- Operating income and ordinary income plans upwardly revised owing to such factors as continued weakness in the yen
- Each of the operating income, ordinary income and bottom line profit levels expected to reach record highs

(Billions of yen)	FY2015 Results	FY2016 Revised Plan	Difference	FY2016 Plan (Oct. 2016)	Difference
	Net Sales	1,096.3	1,067.0	-29.3	1,066.0
Operating Income	89.8	96.0	+6.2	94.0	+2.0
Ordinary Income	81.2	92.0	+10.8	88.0	+4.0
Net Income Attributable to Owners of Parent	56.7	59.0	+2.3	59.0	0

## FY2016 Net Sales and Operating Income by Divisional Company

- HPP: Revised plans upwardly revised owing to such factors as continued weakness in the yen; expected to an increase in profit on a full fiscal year basis (record divisional company high)
- Housing: Increase in both 1H and 2H profit; projected to return to a profit growth trajectory on an annual basis
- UIEP: Projected to secure a substantial increase in profit due mainly to successful efforts aimed at reforming the portfolio (record high profit on a UIEP company basis)

(Billions of yen)	FY2015 Results		FY2016 Revised Plan		Difference		FY2016 Plan (Oct. 2016)		Difference	
	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income
HPP	378.6	53.4	356.0	54.0	-22.6	+0.6	352.0	52.0	+4.0	+2.0
Housing	473.4	36.4	486.0	38.0	+12.6	+1.6	487.0	38.0	-1.0	0
UIEP	226.3	3.6	242.0	12.0	+15.7	+8.4	244.0	12.0	-2.0	0
Others	38.3	-3.1	3.0	-7.0	-35.3	-3.9	3.0	-7.0	0	0
Eliminations or Unallocatable Accounts	-20.3	-0.5	-20.0	-1.0	+0.3	-0.5	-20.0	-1.0	0	0
Total	1,096.3	89.8	1,067.0	96.0	-29.3	+6.2	1,066.0	94.0	+1.0	+2.0

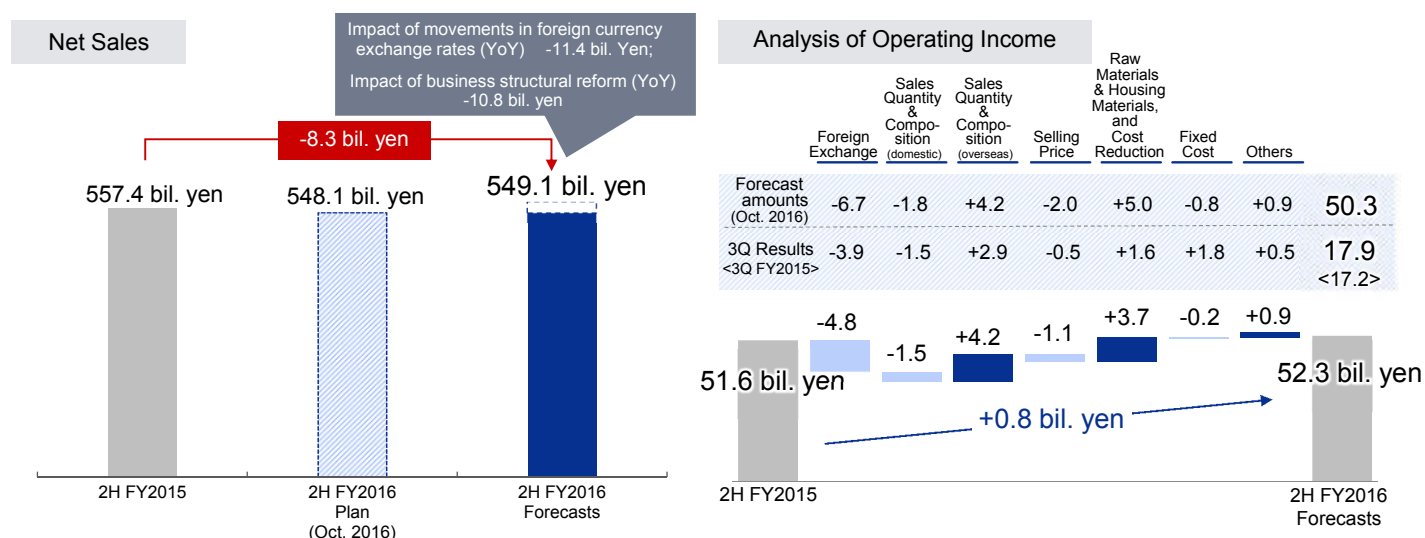
## 2H FY2016 Net Sales and Operating Income by Divisional Company

- Secure an increase in Group-wide profit following the upward revision of HPP Company operating income (Housing and UIEP Company forecasts in line with plans)

(Billions of yen)	2H FY2015 Results		2H FY2016 Revised Plan		Difference		2H FY2016 Plan (Oct. 2016)		Difference	
	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income	Net Sales	Operating Income
HPP	188.5	28.5	179.3	26.5	-9.2	-2.0	175.3	24.5	+4.0	+2.0
Housing	239.6	20.1	248.3	20.8	+8.7	+0.7	249.3	20.8	-1.0	0
UIEP	118.8	4.4	130.0	8.8	+11.2	+4.4	132.0	8.8	-2.0	0
Others	20.7	-1.5	1.7	-3.1	-19.0	-1.7	1.7	-3.1	0	0
Eliminations or Unallocatable Accounts	-10.1	-0.1	-10.1	-0.6	0	-0.6	-10.1	-0.6	0	0
<b>Total</b>	<b>557.4</b>	<b>51.6</b>	<b>549.1</b>	<b>52.3</b>	<b>-8.3</b>	<b>+0.8</b>	<b>548.1</b>	<b>50.3</b>	<b>+1.0</b>	<b>+2.0</b>

## 2H FY2016 Analysis of Net Sales and Operating Income

- Increase in net sales in real terms (+ 14.0 billion yen)
- Offset the negative impact of movements in foreign currency exchange rates (-4.8 billion yen) through a substantial increase in sales volume as well as significant improvement in the product mix overseas and upswing in the spread between selling prices and raw material costs



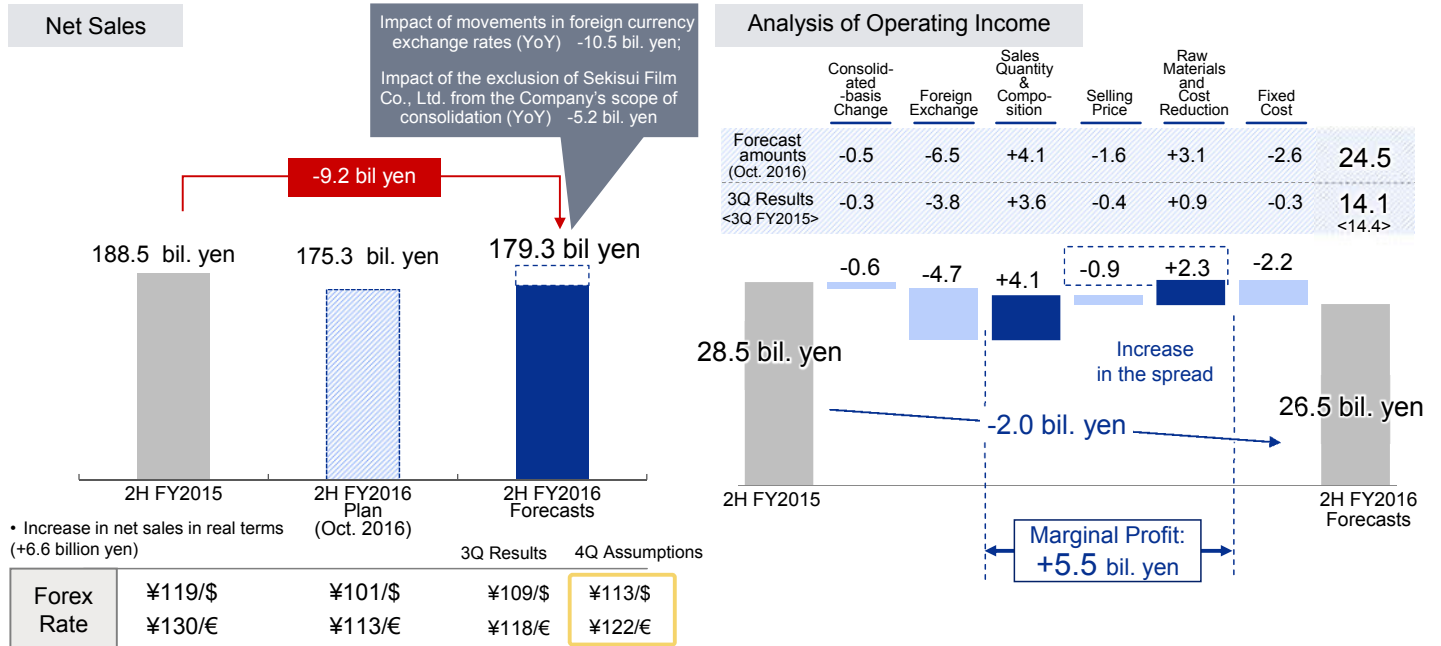
External Environment and Impact on Results	3Q Results/Forecasts	4Q Forecasts/Assumptions	Impact on Results
	Foreign Exchange	¥109/US\$, ¥118/€	¥113/US\$, ¥122/€
Resource Prices	Domestic naphtha price: ¥34,000/kiloliter	Domestic naphtha price: ¥42,000/kiloliter	Increase of ¥1,000/kiloliter decreases operating income by around ¥200 million per year.

# HPP Company: Forecasts for the 2H of FY2016

- Substantial increase in sales volumes and improvement in the product mix focusing mainly on four strategic fields\*; successful efforts to minimize the impact of movements in foreign currency exchange rates by improving the spread between selling prices and raw material costs

\*Four strategic fields; Electronics, Automobiles/Transportation, Building/Infrastructure, and Life Science Fields

## 2H FY2016 Forecasts



# HPP Company: Four Strategic Fields

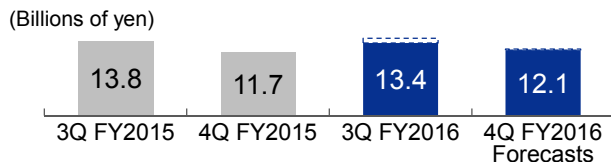
- Electronics field bottoming out; the three other strategic fields progressing in line with plans

## Trends in Net Sales in the Four Strategic Fields and Key Measures in the 2H

\*The area inside the dotted lines depicts foreign exchange rate effects versus the previous fiscal year level.

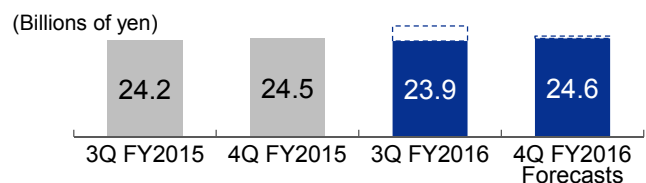
### Electronics

- While 3Q trends are in excess of plans, adjustments anticipated in the 4Q due to seasonal factors
- Robust thin foam application for mobile devices, firm trends in product for use in TVs
- Strengthen tape product lineup (address the growing trend toward narrower bezel and thinner body mobile devices and the increased use of OLEDs)



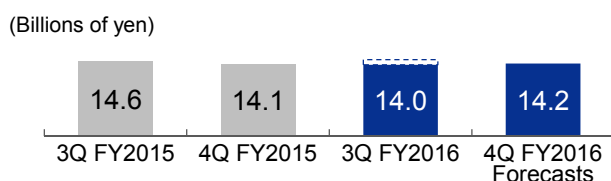
### Automobiles and Transportation

- Ongoing growth in high-performance product sales with application progressing steadily
- Capture demand associated with the trend toward luxury-grade Chinese vehicles



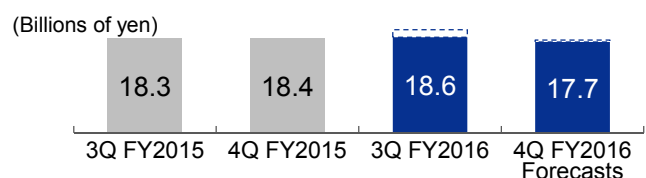
### Building and Infrastructure

- CPVC: While demand in the Middle East remains in the midst of a recovery, progress in cultivating customers in Asia
- Fire-resistant materials: Continued increase in sales on the back of firm construction investment and housing starts



### Life Science

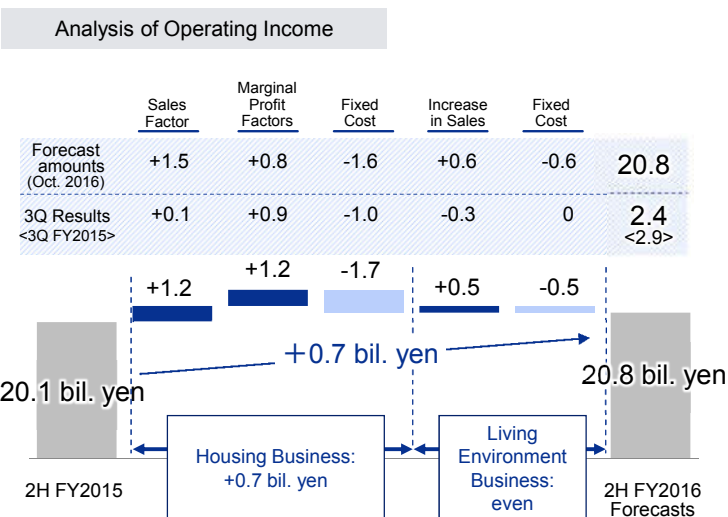
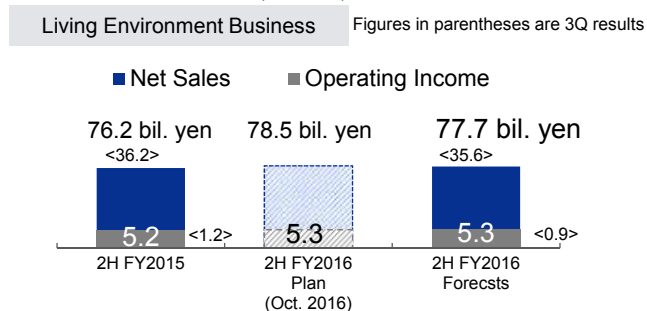
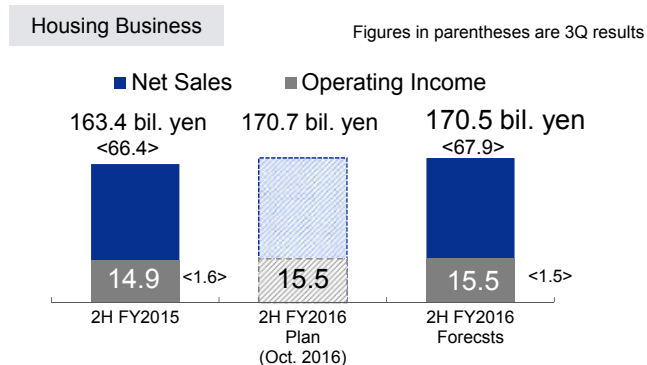
- Diagnostics business firm in Japan; growth overseas (especially in China)
- Progress in implementing initiatives aimed at realizing synergies with EIDIA



# Housing Company: Forecasts for the 2H of FY2016

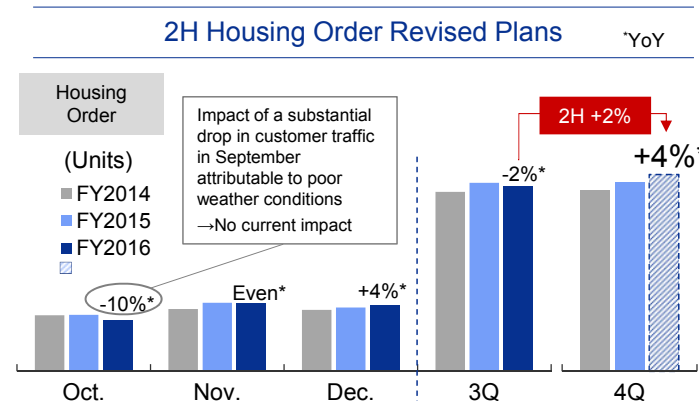
Both the Housing and Living Environment businesses progressing largely in line with plans; projected to achieve 2H operating income plans

- Progress in returning to the Company's original unit product approach (securing greater factory-built efficiency)
- Continued shortage of construction workers in the Kyushu area



# Housing Company: New Housing Orders

Gradual success in implementing various measures aimed at securing order in the 3Q; strengthen product as well as land and subdivision housing strategies in the 4Q



- Market Environment Outlook**
- Notwithstanding an outlook of higher interest rates, an upswing in share prices, continued uncertainty surrounding the market environment
    - Firm trends in demand for built-for-sale housing driven by first buyers
    - Increase in nationwide demand for one-story housing
- ➔ Maintain December performance trends (+4%); achieve 4Q plans

**Trends in 2H Initiatives Aimed at Securing Orders** YoY

	3Q	4Q
<b>Products Strategy</b>	<ul style="list-style-type: none"> <li>Steady increase in G Series orders in each of the urban and rebuilding markets</li> <li>Ongoing progressive renewal of G Series model home galleries</li> </ul>	<ul style="list-style-type: none"> <li>Launch of the self-sufficient, smart house-type flagship product SPS 100% Edition (equipped with the Company's Lib battery)</li> <li>Strengthen one-story housing-type variation</li> </ul>
<b>Land and Subdivision Housing Strategies</b>	<ul style="list-style-type: none"> <li>Nationwide sales of large-scale subdivisions; 12%* increase in subdivision lots as of the beginning of the 3Q compared with the corresponding period of the previous fiscal year</li> <li>Robust ready-built housing sales (3Q +34%*)</li> </ul>	<ul style="list-style-type: none"> <li>Further expand real estate for sale (19%* increase in subdivision lots as of the beginning of the 4Q compared with the corresponding period of the previous fiscal year; 5% compared with the beginning of the 3Q)</li> <li>Further strengthen ready-built housing (up 23% compared with the 3Q)</li> </ul>
<b>Customer Traffic and Increase in Customer Prospects</b>	<ul style="list-style-type: none"> <li>Continued improvements in customer traffic as well as overall ranking including negotiation prospects through simultaneous nationwide plant, construction site and completed home tours</li> </ul>	<ul style="list-style-type: none"> <li>Bolster customer traffic through other than model home galleries                             <ul style="list-style-type: none"> <li>Plant and construction site tours; open house; requests for documents</li> </ul> </li> </ul>

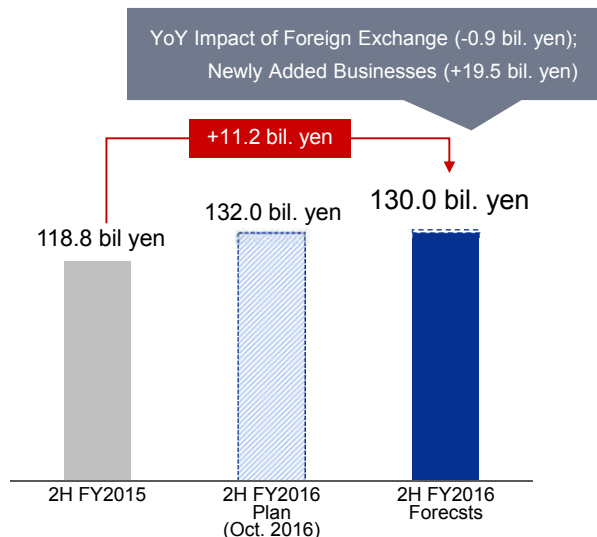


# UIEP Company: Forecasts for the 2H of FY2016

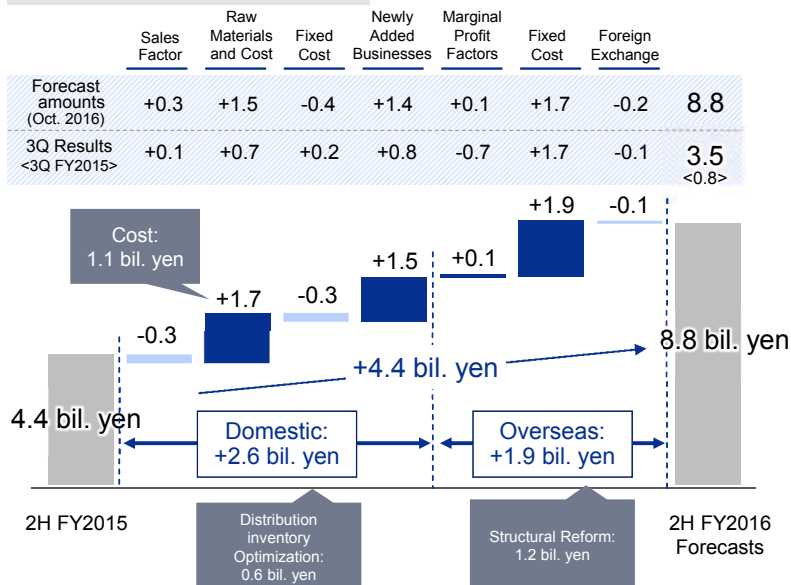
Improvements in profitability expected to progress in line with plans; projected to achieve record-high profit on a divisional company basis for the full fiscal year

- Domestic ▶ Results anticipated to progress in line with plans due to firm demand (new housing starts, etc.) and improvements in manufacturing costs
- Overseas ▶ The effects of structural reforms emerged in line with plans; continued growth in sales of high-value-added products (sheets, industrial piping materials, FFU, etc.)

## Net Sales



## Analysis of Operating Income



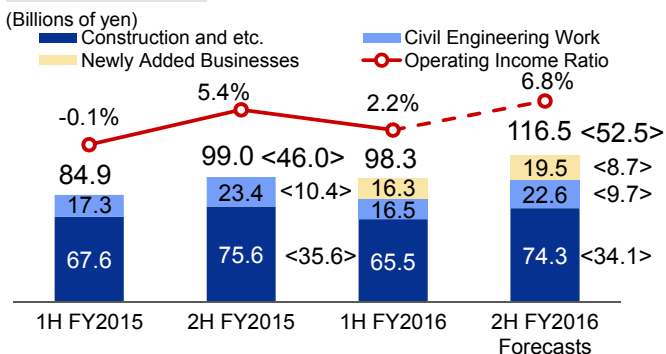
# UIEP Company: Progress regarding Key Measures in 2H FY2016

Firmly entrench portfolio reforms

1. Complete structural reforms, 2. Continue to improve profitability, 3. Expand sales of high-value-added products

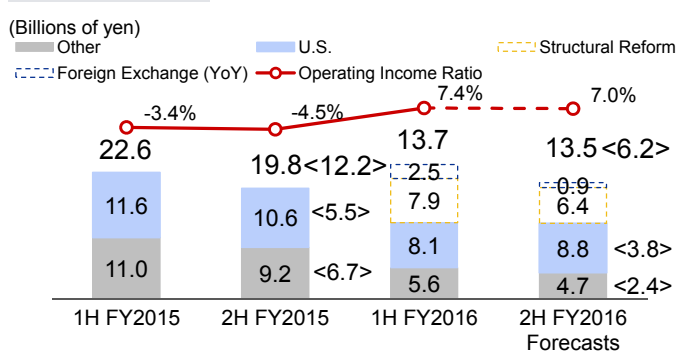
	Improvements in Profitability	Growth strategy
<b>Domestic</b>	<ul style="list-style-type: none"> <li>• Progress with respect to operating income plans: 41% (3Q/2H, previous fiscal year 25%)</li> <li>• Progress with respect to improving manufacturing costs by firmly establishing efforts aimed at leveling shipments</li> </ul>	<ul style="list-style-type: none"> <li>• Promote the continued shift of development man-hours to priority fields</li> <li>• Initiate collaboration with the HPP Company</li> </ul>
<b>Overseas</b>	<ul style="list-style-type: none"> <li>• Progress with respect to operating income plans: 42% (3Q/2H, operating loss in the previous year)</li> <li>• Progress with respect to improving mainstay industrial piping materials plant productivity</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure that the new aircraft sheet plant is operating at full capacity</li> <li>• Progress in the application of railway sleepers (FFU) in Europe and Australia</li> </ul>

## Domestic Sales



Figures in parentheses are 3Q results

## Overseas Sales



Figures in parentheses are 3Q results



## Financial Results for 3Q FY2016

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## Consolidated Companies

### Number of Consolidated Companies

	Mar. 31, 2016	Dec. 31, 2016	Difference
Consolidated Subsidiaries	155	145	Increased: 0 Subsidiaries Decreased: 10 Subsidiaries
Affiliates (Equity Method)	8	8	Increased: 1 Subsidiary Decreased: 1 Subsidiary

### Influence of Change in the Number of Consolidated Companies

	First 9 months of FY2016	Difference
Net Sales	-13.1 bil. yen	<ul style="list-style-type: none"><li>EIDIA*1,</li><li>Sekisui SPR Europe*2 and etc.</li><li>Sekisui Film*3 and etc.</li></ul>
Operating Income	+1.1 bil. yen	

\*1: Newly consolidated from 4Q FY2015

\*2: Removed from consolidation from 4Q FY2015

\*3: Removed from consolidation from 2Q FY2016



## Summary of Profit and Loss

(Billions of yen)		First 9 months of FY2015	First 9 months of FY2016	Difference	
Net Sales		799.7	766.2	-33.4	
Gross Profit		248.2	253.9	+5.7	
Gross Profit Rate		31.0%	33.1%	+2.1%	
Selling, Gen. and Admin. Expenses		192.8	192.4	-0.4	
Operating Income		55.4	61.5	+6.1	
Equity in Earnings of Affiliates		1.2	1.7	+0.5	
Other Non-operating Income and Expenses		-2.2	0.5	+2.8	Foreign exchange gain ▶ <b>0.6 bil. yen</b>
Ordinary Income		54.4	63.7	+9.4	
Extraordinary Income		10.8	6.9	-3.9	Gain on sales of securities
Extraordinary Loss		12.7	11.0	-1.6	Provision for loss on transfer of business, and etc.
Income before Income Taxes		52.4	59.6	+7.1	
Corporate Income Tax, etc.		11.3	18.2	+6.9	Tax effect on the previous fiscal year's loss on transfer of businesses Tax rate: 21.6%→30.6%
Net Income Attributable to Non-controlling Interests		0.7	1.4	+0.7	
Net Income Attributable to Owners of Parent		40.5	39.9	-0.5	
Foreign Exchange (Avg. rate)	1US\$	122 yen	107 yen	-15 yen	
	1€	134 yen	118 yen	-16 yen	

## Balance Sheets (Assets)

(Billions of yen)		Mar. 31, 2016	Dec. 31, 2016	Difference	
Cash and Deposits		68.0	74.4	+6.3	
Account Receivable on Sales		176.0	169.2	-6.8	
Inventories		150.8	168.7	+18.0	
Other Current Assets		39.7	46.3	+6.6	
Tangible Non-Current Assets		270.0	264.5	-5.4	
Intangible Non-Current Assets		43.7	41.3	-2.5	
Investments in Securities		168.3	159.3	-9.0	Sales, At fair value, and etc.
Investments & Other Assets		19.6	19.2	-0.4	
Total Assets		936.0	942.9	+6.9	Foreign exchange ▶ <b>-2.8 bil. yen</b>

## Balance Sheets (Liabilities & Net Assets)

(Billions of yen)	Mar. 31, 2016	Dec. 31, 2016	Difference	
Non-Interest-Bearing Liabilities	339.5	340.4	+0.8	
Interest-Bearing Liabilities	52.3	48.2	-4.1	
<b>Total Liabilities</b>	<b>391.9</b>	<b>388.6</b>	<b>-3.3</b>	
Capital Stock etc.	209.2	209.3	+0.1	
Retained Earning	295.7	320.0	+24.4	Net income ▶ <b>39.9 bil. yen</b>
Treasury Stock	-26.0	-41.4	-15.5	Dividends paid ▶ <b>-15.5 bil. yen</b>
Unrealized Holding Gain on Securities	40.1	41.9	+1.8	
Non-controlling Interests	20.6	21.3	+0.7	
Other Net Assets	4.6	3.3	-1.3	Purchases of treasury stock ▶ <b>-16.4 bil. yen</b>
<b>Total Net Assets</b>	<b>544.2</b>	<b>554.3</b>	<b>+10.2</b>	Foreign currency translation adjustment ▶ <b>-1.5 bil. yen</b>
<b>Total Liabilities, Net Assets</b>	<b>936.0</b>	<b>942.9</b>	<b>+6.9</b>	

## Consolidated Cash Flows

(Billions of yen)	First 9 months of FY2015	First 9 months of FY2016
Operating Activities Cash Flows	42.8	59.0
Investing Activities Cash Flows	-10.7 <sup>*</sup>	-14.8
Financing Activities Cash Flows	-22.4	-37.6
<b>Net Increase in Cash and Cash Equivalents</b>	<b>8.3</b>	<b>6.2</b>
<b>Cash and Cash Equivalents at the End of Term</b>	<b>72.4</b>	<b>73.3</b>
<b>Free Cash Flow</b> =Operating Activities Cash Flows+Investing Activities Cash Flows -Dividends Paid	<b>17.7</b>	<b>28.2</b>

<sup>\*</sup>Includes 23.4 billion yen in (net) proceeds from the withdrawal of time deposits and a decrease of 12.4 billion yen for the purchase of EIDIA Co., Ltd.

## Depreciation and Capital Expenditures

(Billions of yen)	First 9 months of FY2015	First 9 months of FY2016	Difference	FY2015	FY2016 Forecasts	Difference
Depreciation	25.8	25.7	-0.1	34.7	35.0	+0.3
Capital Expenditures	33.4	30.2	-3.2	49.7	43.0	-6.7

## FY2016 Revised Plan

(Billions of yen)	FY2015	FY2016 Revised Plan	Difference	FY2016 Plan (Oct. 2016)
Net Sales	1,096.3	1,067.0	-29.3	1,066.0
Operating Income	89.8	96.0	+6.2	94.0
Ordinary Income	81.2	92.0 *	+10.8	88.0
Net Income Attributable to Owners of Parent	56.7	59.0	+2.3	59.0
Dividend per Share (Yen)	30	32	+2	32

\*Forex rate assumptions for 4Q FY2016 forecasts are ¥113/US\$ and ¥122/€.

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# Housing Company Results and Plan

1. Main data in Housing business		FY2016				FY2015				FY2014
		1H	3Q	2H (plan)	Annual (plan)	1H	3Q	2H	Annual	Annual
CONSOLIDATED	Net Sales (Billions of yen)	237.7	103.5	248.3	486.0	233.9	102.6	239.6	473.4	494.1
	Housing	162.3	67.9	170.5	332.8	157.8	66.4	163.4	321.2	342.3
	Houses	149.5	61.7	157.2	306.7	145.6	60.4	151.6	297.1	321.1
	Land	11.9	5.7	12.2	24.1	10.4	5.5	10.9	21.4	18.7
	Living Environment	75.5	35.6	77.7	153.2	76.0	36.2	76.2	152.2	151.8
	Refurbishing	48.3	22.3	49.7	98.0	50.2	23.8	50.2	100.4	105.9
	Interior-Exterior	2.7	1.2	2.9	5.6	2.9	1.2	2.7	5.6	5.7
Real estate	22.7	11.2	23.3	46.0	21.2	10.4	21.6	42.8	38.8	
OTHERS	1.Number of houses sold (Housing units)	6,620	2,470	7,110	13,730	6,480	2,550	6,900	13,380	14,490
	Detached houses	4,740	2,030	4,850	9,590	4,630	1,980	4,780	9,410	10,120
	Heim	3,790	1,630	3,930	7,720	3,660	1,550	3,800	7,460	8,080
	Two-U	950	400	920	1,870	970	430	980	1,950	2,040
	Apartments (housing complex)	1,880	440	2,260	4,140	1,850	570	2,120	3,970	4,370
	2. Main data									
	Prices <Sales subsidiaries: Detached houses>/Unit (Millions of yen)	30.4	31.0	-	-	30.6	30.6	30.1	30.3	30.3
	Prices <Sales subsidiaries: Detached houses>/Tsubo (3.3 Square meter)(Thousands of yen)	818	828	-	-	805	810	809	806	794
	Floor space (Square meter)	122.7	123.5	-	-	125.4	124.6	122.8	124.1	125.9
	Exhibition places (Units)	412	416	-	416	425	414	-	413	425
Sales staff (Number of person)	2,522	2,431	-	2,383	2,503	2,446	-	2,395	2,488	
Rebuilding ratio (%)*	30%	30%	31%	31%	26%	27%	28%	27%	29%	
Referral sales ratio (%)*	37%	35%	35%	37%	39%	37%	37%	38%	38%	

\* Rebuilding ratio and Referral sales ratio are based on time of orders-received.

# Housing Company Results and Plan

2. Housing orders		FY2016				FY2015				FY2014		
(Millions of yen)		1H	3Q	2 H(Plan)	Annual (plan)	1H	3Q	2H	Annual	1H	2H	Annual
Year-start Backlog	205,500	207,500	207,500	-	204,300	205,500	205,500	-	232,000	222,400	-	-
Growth Rate	+1%	+1%	+1%	-	-12%	-8%	-8%	-	+10%	-9%	-	-
New Orders	202,457	93,917	208,752	411,210	199,914	97,564	204,391	404,304	209,943	195,011	404,954	
Growth Rate	+1%	-4%	+2%	+2%	-5%	+3%	+5%	±0%	-15%	-8%	-12%	
Sales of houses	200,457	85,217	209,752	410,210	198,714	85,464	204,391	403,104	219,543	213,111	432,654	
Growth Rate	+1%	±0%	+3%	+2%	-9%	-10%	-4%	-7%	+2%	-5%	-2%	
Balance at the end	207,500	216,200	206,500	-	205,500	217,600	205,500	-	222,400	204,300	-	-
Growth Rate	+1%	-1%	+1%	-	-8%	-2%	+1%	-	-9%	-12%	-	-

3. Housing starts		FY2016				FY2015				FY2014
(Units)		1H	3Q	2 H(Plan)	Annual (plan)	1H	3Q	2H	Annual	Annual
Housing starts*	500,000	242,000	449,000	949,000	471,845	233,450	448,692	920,537	880,470	
Privately-owned houses* (included in above)=A	153,000	74,500	136,000	289,000	148,339	73,940	136,102	284,441	278,221	
Sales by our company	6,620	2,470	7,110	13,730	6,480	2,550	6,900	13,380	14,490	
Detached house sales by our company=B	4,740	2,030	4,850	9,590	4,630	1,980	4,780	9,410	10,120	
Our share in Detached houses=B/A	3.1%	2.7%	3.6%	3.3%	3.1%	2.7%	3.5%	3.3%	3.6%	

\*\*The housing starts" and "Privately-owned houses" after 3Q of FY2016 are based on forecasts.

4.The ratio of the houses equipped with the high-performance specifications		FY2016				FY2015				FY2014
		1H	3Q	2 H(Plan)	Annual (plan)	1H	3Q	2H	Annual	Annual
Solar power generation systems installed	77%	78%	78%	78%	80%	80%	79%	79%	82%	
Tiled exterior walls (Heim type JX)	67%	68%	68%	67%	65%	66%	66%	66%	64%	
Storage battery installed	21%	24%	25%	23%	27%	21%	23%	25%	27%	
Comfortable Air System	73%	74%	74%	74%	67%	69%	73%	70%	68%	