

2025年3月期第1Q
(2024.4.1~2024.6.30)

決算 補足資料

Financial results supplementary materials



株式会社コメリ
KOMERI Co., Ltd

| |
|------------------------|
| 目次 (Table of contents) |
|------------------------|

| | | |
|--|-----|----|
| 1、連結業績の概要 | ... | P1 |
| Summary of consolidated results | | |
| 2、連結四半期業績の概要 | ... | P2 |
| Summary of consolidated quarterly results | | |
| 3、連結財政状況等 | ... | P3 |
| Consolidated financial situation | | |
| 4、商品別連結売上高、荒利益高の状況 | ... | P4 |
| Status of consolidated sales and gross profit by product | | |
| 5、業態別売上高の状況 | ... | P5 |
| Status of sales by Format | | |
| 6、都道府県別店舗数 | ... | P6 |
| Number of stores by prefecture | | |

1、連結業績の概要 (Summary of consolidated results) 単位: 百万円 (Millions of yen)

| | 2023年3月期第1Q 2022.4.1～2022.6.30 | | 2024年3月期第1Q 2023.4.1～2023.6.30 | | 2025年3月期第1Q 2024.4.1～2024.6.30 | |
|--|-----------------------------------|------------------|-----------------------------------|------------------|-----------------------------------|------------------|
| | 金額 Actural result | 前年 同期比 YoY | 金額 Actural result | 前年 同期比 YoY | 金額 Actural result | 前年 同期比 YoY |
| 営業収益 Operating revenue | 107,595 | 101.1% | 104,074 | 96.7% | 107,449 | 103.2% |
| 売上高 Net Sales | 103,945 | 101.1% | 100,458 | 96.6% | 103,825 | 103.4% |
| 営業収入 Real estate lease revenue, etc. | 3,649 | 99.7% | 3,615 | 99.1% | 3,624 | 100.2% |
| 営業総利益 Operating gross profit | 37,032 | 100.5% | 34,603 | 93.4% | 36,158 | 104.5% |
| 営業総利益率 Operating gross margin ratio | 34.4% | △0.2 | 33.2% | △1.2 | 33.7% | +0.5 |
| 売上総利益 Gross profit | 33,382 | 100.5% | 30,988 | 92.8% | 32,534 | 105.0% |
| 売上総利益率 Gross margin ratio | 32.1% | △0.2 | 30.8% | △1.3 | 31.3% | +0.5 |
| 販売費及び一般管理費 Selling, general and administrative expenses | 26,436 | 99.9% | 26,163 | 99.0% | 26,696 | 102.0% |
| 人件費 Labor expenses | 11,818 | 96.8% | 11,586 | 98.0% | 11,853 | 102.3% |
| 販売費 Selling expenses | 3,719 | 103.6% | 3,456 | 92.9% | 3,334 | 96.5% |
| 設備費 Equipment expenses | 8,229 | 102.3% | 8,409 | 102.2% | 8,724 | 103.7% |
| その他経費 Other | 2,670 | 101.7% | 2,709 | 101.5% | 2,784 | 102.8% |
| 販管比率 SG&A expenses to operating revenue | 24.6% | △0.3 | 25.1% | +0.5 | 24.8% | △0.3 |
| 営業利益 Operating profit | 10,595 | 101.9% | 8,440 | 79.7% | 9,462 | 112.1% |
| 営業利益率 Operating profit ratio | 9.8% | +0.0 | 8.1% | △1.7 | 8.8% | +0.7 |
| 経常利益 Ordinary profit | 10,199 | 97.8% | 8,399 | 82.4% | 9,659 | 115.0% |
| 経常利益率 Ordinary profit ratio | 9.5% | △0.3 | 8.1% | △1.4 | 9.0% | +0.9 |
| 親会社株主に帰属する四半期純利益 Profit attributable to owners of parent | 6,916 | 98.9% | 5,654 | 81.8% | 6,562 | 116.1% |
| 親会社株主に帰属する四半期純利益率 Profit ratio attributable to owners of parent | 6.4% | △0.2 | 5.4% | △1.0 | 6.1% | +0.7 |

2、連結四半期業績の概要 (Summary of consolidated quarterly results)

単位：百万円 (Millions of yen)

| | 2025年3月期 第1Q 2024.4.1～6.30 | | 2025年3月期 第2Q 2024.7.1～9.30 | | 2025年3月期 第3Q 2024.10.1～12.31 | | 2025年3月期 第4Q 2025.1.1～3.31 | |
|--|-------------------------------|------------------|-------------------------------|------------------|---------------------------------|------------------|-------------------------------|------------------|
| | 金額 Actural result | 前年 同期比 YoY | 金額 Actural result | 前年 同期比 YoY | 金額 Actural result | 前年 同期比 YoY | 金額 Actural result | 前年 同期比 YoY |
| 営業収益 Operating revenue | 107,449 | 103.2% | - | - | - | - | - | - |
| 売上高 Net Sales | 103,825 | 103.4% | - | - | - | - | - | - |
| 営業収入 Real estate lease revenue, etc. | 3,624 | 100.2% | - | - | - | - | - | - |
| 営業総利益 Operating gross profit | 36,158 | 104.5% | - | - | - | - | - | - |
| 営業総利益率 Operating gross margin ratio | 33.7% | +0.5 | - | - | - | - | - | - |
| 売上総利益 Gross profit | 32,534 | 105.0% | - | - | - | - | - | - |
| 売上総利益率 Gross margin ratio | 31.3% | +0.5 | - | - | - | - | - | - |
| 販売費及び一般管理費 Selling, general and administrative expenses | 26,696 | 102.0% | - | - | - | - | - | - |
| 人件費 Labor expenses | 11,853 | 102.3% | - | - | - | - | - | - |
| 販売費 Selling expenses | 3,334 | 96.5% | - | - | - | - | - | - |
| 設備費 Equipment expenses | 8,724 | 103.7% | - | - | - | - | - | - |
| その他経費 Other | 2,784 | 102.8% | - | - | - | - | - | - |
| 販管比率 SG&A expenses to operating revenue | 24.8% | △0.3 | - | - | - | - | - | - |
| 営業利益 Operating profit | 9,462 | 112.1% | - | - | - | - | - | - |
| 営業利益率 Operating profit ratio | 8.8% | +0.7 | - | - | - | - | - | - |
| 経常利益 Ordinary profit | 9,659 | 115.0% | - | - | - | - | - | - |
| 経常利益率 Ordinary profit ratio | 9.0% | +0.9 | - | - | - | - | - | - |
| 親会社株主に帰属する四半期純利益 Profit attributable to owners of parent | 6,562 | 116.1% | - | - | - | - | - | - |
| 親会社株主に帰属する四半期純利益率 Profit ratio attributable to owners of parent | 6.1% | +0.7 | - | - | - | - | - | - |

3、連結財政状況等 (Consolidated financial situation) 単位: 百万円 (Millions of yen)

| | 2023年3月期第1Q 2022.4.1～2022.6.30 | | 2024年3月期第1Q 2023.4.1～2023.6.30 | | 2025年3月期第1Q 2024.4.1～2024.6.30 | |
|---|-----------------------------------|------------|-----------------------------------|------------|-----------------------------------|------------|
| | 金額 Actural result | 前期比 YoY | 金額 Actural result | 前期比 YoY | 金額 Actural result | 前期比 YoY |
| 総資産 Total assets | 363,268 | 102.2% | 364,268 | 100.3% | 378,490 | 103.9% |
| 純資産 Net assets | 218,088 | 105.7% | 229,314 | 105.1% | 239,572 | 104.5% |
| 自己資本比率 Equity ratio | 60.0% | +1.9 | 63.0% | +3.0 | 63.3% | +0.3 |
| 有利子負債 Interest-bearing liability | 35,955 | 81.1% | 28,668 | 79.7% | 32,157 | 112.2% |
| うち、リース債務 inside, Lease obligations | 4,617 | 103.9% | 4,956 | 107.3% | 5,120 | 103.3% |
| 減価償却費 Depreciation expense | 2,889 | 100.3% | 2,986 | 103.4% | 3,060 | 102.5% |
| 営業キャッシュ・フロー Cash flows from operating activities | 17,722 | 177.2% | 13,330 | 75.2% | 10,779 | 80.9% |
| 投資キャッシュ・フロー Cash flows from investing activities | △4,289 | 189.5% | △4,092 | 95.4% | △3,847 | 94.0% |
| 財務キャッシュ・フロー Cash flows from financing activities | △3,601 | 172.7% | △4,599 | +127.7 | △4,358 | 94.8% |
| 総資産経常利益率 ROA | 7.8% | △0.3 | 6.6% | △1.2 | 6.3% | △0.3 |
| 自己資本当期純利益率 ROE | 8.4% | △1.1 | 7.1% | △1.3 | 6.2% | △0.9 |
| 1株当たり当期純利益 Earnings per share | 141.84円 | +1.23円 | 117.10円 | △24.74円 | 137.75円 | +20.65円 |
| 1株当たり純資産 Net assets per share | 4,496.10円 | +347.18円 | 4,801.54円 | +305.44円 | 5,060.21円 | +258.67円 |
| 出退店数(4～6月) Number of stores opened and closed | 店数 Stores | - | 店数 Stores | - | 店数 Stores | - |
| 出店数(4～6月) Number of store openings | 2店 | - | 3店 | - | 4店 | - |
| 閉店数(4～6月) Number of stores closed | 2店 | - | 1店 | - | 3店 | - |
| 期末店舗数 Number of stores at the end of the period | 1,214店 | - | 1,216店 | - | 1,221店 | - |

4、(1) 商品別連結売上高の状況 (Status of consolidated sales by product)

単位：百万円 (Millions of yen)

| | 2024年3月期第1Q 2023.4.1～2023.6.30 | | 2025年3月期第1Q 2024.4.1～2024.6.30 | | |
|--|-----------------------------------|--------------|-----------------------------------|--------------|------------|
| | 金額 Actural result | 構成比 Share | 金額 Actural result | 構成比 Share | 前年比 YoY |
| 工具・金物・作業用品 Tools, hardware and workwear | 17,574 | 16.9% | 18,209 | 17.0% | 103.6% |
| リフォーム資材・エクステリア用品 Exterior goods and goods for remodeling | 15,195 | 14.6% | 15,364 | 14.3% | 101.1% |
| 園芸・農業・ペット用品 Gardening and agricultural and pet supplies | 40,384 | 38.8% | 41,833 | 38.9% | 103.6% |
| 日用品・家電・カー・レジャー用品 Commodities and appliances and outdoor goods | 16,562 | 15.9% | 17,871 | 16.6% | 107.9% |
| インテリア・家庭・オフィス用品 Interior goods and cleaning supplies | 8,450 | 8.1% | 8,370 | 7.8% | 99.1% |
| 燃料他 Fuel,etc | 1,251 | 1.2% | 1,113 | 1.0% | 89.0% |
| その他 Real estate lease revenue,etc. | 3,610 | 3.5% | 3,619 | 3.4% | 100.2% |
| ホームセンター事業計 Homecenter business total sales | 103,029 | 99.0% | 106,383 | 99.0% | 103.3% |
| その他事業 Other business | 1,044 | 1.0% | 1,066 | 1.0% | 102.1% |
| 営業収益 Operating revenue | 104,074 | 100.0% | 107,449 | 100.0% | 103.2% |

4、(2) 商品別連結荒利益高の状況 (Status of consolidated gross profit by product)

| | 2024年3月期第1Q 2023.4.1～2023.6.30 | | 2025年3月期第1Q 2024.4.1～2024.6.30 | | |
|--|-----------------------------------|--------------|-----------------------------------|------------|--------------|
| | 金額 Actural result | 荒利益率 GM % | 金額 Actural result | 前年比 YoY | 荒利益率 GM % |
| 工具・金物・作業用品 Tools, hardware and workwear | 7,571 | 43.1% | 7,795 | 103.0% | 42.8% |
| リフォーム資材・エクステリア用品 Exterior goods and goods for remodeling | 4,382 | 28.8% | 4,435 | 101.2% | 28.9% |
| 園芸・農業・ペット用品 Gardening and agricultural and pet supplies | 11,612 | 28.8% | 12,116 | 104.3% | 29.0% |
| 日用品・家電・カー・レジャー用品 Commodities and appliances and outdoor goods | 3,682 | 22.2% | 4,445 | 120.7% | 24.9% |
| インテリア・家庭・オフィス用品 Interior goods and cleaning supplies | 3,343 | 39.6% | 3,305 | 98.9% | 39.5% |
| 燃料他 Fuel,etc | 71 | 5.8% | 113 | 157.3% | 10.2% |
| その他 Real estate lease revenue,etc. | 3,610 | 100.0% | 3,619 | 100.2% | 100.0% |
| ホームセンター事業計 Homecenter business gross profit | 34,273 | 33.3% | 35,831 | 104.5% | 33.7% |
| その他事業 Other business | 330 | 31.6% | 327 | 99.3% | 30.7% |
| 営業総利益 Operating gross profit | 34,603 | 33.2% | 36,158 | 104.5% | 33.7% |

5、業態別売上高の状況 (Status of sales by Store Format)

| | | 2023年3月期第1Q 2022.4.1～2022.6.30 | | 2024年3月期第1Q 2023.4.1～2023.6.30 | | 2025年3月期第1Q 2024.4.1～2024.6.30 | |
|-----|--|-----------------------------------|--------------------|-----------------------------------|--------------------|-----------------------------------|--------------------|
| | | 全店 All stores | 既存店 Same stores | 全店 All stores | 既存店 Same stores | 全店 All stores | 既存店 Same stores |
| PW | 売上高前年比 Sales YoY | 102.6% | 99.2% | 97.8% | 97.0% | 104.2% | 102.5% |
| | 客数前年比 Number of customers YoY | 97.7% | 94.6% | 94.0% | 93.3% | 100.5% | 98.9% |
| | 客単価前年比 Customer unit price YoY | 105.0% | 104.8% | 104.1% | 104.0% | 103.8% | 103.7% |
| PRO | 売上高前年比 Sales YoY | 156.8% | 103.7% | 118.5% | 104.9% | 136.3% | 109.2% |
| | 客数前年比 Number of customers YoY | 148.5% | 94.4% | 114.9% | 98.9% | 134.8% | 103.8% |
| | 客単価前年比 Customer unit price YoY | 105.5% | 109.8% | 103.1% | 106.1% | 101.1% | 105.2% |
| H&G | 売上高前年比 Sales YoY | 100.0% | 99.9% | 96.0% | 95.7% | 102.4% | 101.8% |
| | 客数前年比 Number of customers YoY | 94.4% | 94.4% | 91.9% | 91.8% | 98.2% | 97.9% |
| | 客単価前年比 Customer unit price YoY | 105.9% | 105.7% | 104.5% | 104.3% | 104.3% | 104.0% |
| 合計 | 売上高前年比 Sales YoY | 101.1% | 99.7% | 96.7% | 96.2% | 103.4% | 102.1% |
| | 灯油除く売上高前年比 Sales excluding kerosene YoY | 100.9% | 99.6% | 96.9% | 96.3% | 103.5% | 102.3% |
| | 客数前年比 Number of customers YoY | 95.3% | 94.5% | 92.5% | 92.2% | 99.0% | 98.2% |
| | 客単価前年比 Customer unit price YoY | 106.0% | 105.5% | 104.6% | 104.3% | 104.4% | 104.1% |

6、都道府県別店舗数 (Number of stores by prefecture)

2024年6月30日現在
As of June 30, 2024

| 都道府県名 Prefecture | 店舗業態 (Store Format) [※] | | | | | 都道府県名 Prefecture | 店舗業態 (Store Format) [※] | | | | |
|---------------------|----------------------------------|-----|-----|----|-------------|---------------------|----------------------------------|-----|-------|----|-------------|
| | PW | PRO | H&G | AT | 合計 Total | | PW | PRO | H&G | AT | 合計 Total |
| 北海道 Hokkaido | 11 | | 14 | | 25 | 三重県 Mie | 4 | 6 | 38 | | 48 |
| 青森県 Aomori | 2 | | 18 | | 20 | 滋賀県 Shiga | 3 | | 25 | | 28 |
| 岩手県 Iwate | 3 | | 36 | | 39 | 京都府 Kyoto | | | 19 | | 19 |
| 宮城県 Miyagi | 1 | | 35 | | 36 | 大阪府 Osaka | | | 7 | | 7 |
| 秋田県 Akita | 5 | 1 | 33 | | 39 | 兵庫県 Hyogo | | | 30 | | 30 |
| 山形県 Yamagata | 4 | 3 | 20 | | 27 | 奈良県 Nara | 2 | 1 | 12 | | 15 |
| 福島県 Fukushima | 2 | | 50 | | 52 | 和歌山県 Wakayama | 7 | | 13 | | 20 |
| 茨城県 Ibaraki | 5 | | 41 | | 46 | 鳥取県 Tottori | | | 12 | | 12 |
| 栃木県 Tochigi | 2 | | 37 | | 39 | 島根県 Shimane | | | 8 | | 8 |
| 群馬県 Gunma | 1 | | 40 | | 41 | 岡山県 Okayama | 2 | | 27 | | 29 |
| 埼玉県 Saitama | | | 33 | | 33 | 広島県 Hiroshima | 1 | | 20 | | 21 |
| 千葉県 Chiba | 5 | | 47 | | 52 | 山口県 Yamaguchi | | | 16 | | 16 |
| 東京都 Tokyo | | | 10 | | 10 | 徳島県 Tokushima | | | 17 | | 17 |
| 神奈川県 Kanagawa | | | 7 | | 7 | 香川県 Kagawa | 1 | | 9 | | 10 |
| 新潟県 Niigata | 12 | 2 | 62 | 4 | 80 | 愛媛県 Ehime | 1 | | 9 | | 10 |
| 富山県 Toyama | 3 | 1 | 21 | | 25 | 高知県 Kochi | | | 12 | | 12 |
| 石川県 Ishikawa | 2 | 1 | 17 | | 20 | 福岡県 Fukuoka | 8 | | 19 | | 27 |
| 福井県 Fukui | 2 | | 18 | | 20 | 佐賀県 Saga | 2 | | 13 | | 15 |
| 山梨県 Yamanashi | | 1 | 19 | | 20 | 長崎県 Nagasaki | 2 | | 15 | | 17 |
| 長野県 Nagano | 3 | | 53 | | 56 | 熊本県 Kumamoto | 1 | | 39 | | 40 |
| 岐阜県 Gifu | | | 39 | | 39 | 大分県 Oita | | | 15 | | 15 |
| 静岡県 Shizuoka | 1 | | 21 | | 22 | 宮崎県 Miyazaki | 1 | | 20 | | 21 |
| 愛知県 Aichi | 2 | | 8 | | 10 | 鹿児島県 Kagoshima | 3 | | 23 | | 26 |
| | | | | | | 合計 Total | 104 | 16 | 1,097 | 4 | 1,221 |

※店舗業態 (Store Format) 表記は以下の通り

PW: パワー (Power)、PRO: プロ (PRO)、H&G: ハード & グリーン (Hard&Green)、AT: アテナ (Athena)