

2025年3月期第2Q
(2024.4.1~2024.9.30)

決算 補足資料

Financial results supplementary materials



株式会社コメリ
KOMERI Co., Ltd

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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2Q 2022.4.1～2022.9.30 | | 2024年3月期第2Q 2023.4.1～2023.9.30 | | 2025年3月期第2Q 2024.4.1～2024.9.30 | |
|--|-----------------------------------|------------------|-----------------------------------|------------------|-----------------------------------|------------------|
| | 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 | 197,888 | 100.5% | 194,277 | 98.2% | 198,804 | 102.3% |
| 売上高 Net Sales | 190,890 | 100.5% | 187,262 | 98.1% | 191,739 | 102.4% |
| 営業収入 Real estate lease revenue, etc. | 6,998 | 100.9% | 7,015 | 100.3% | 7,065 | 100.7% |
| 営業総利益 Operating gross profit | 69,853 | 99.7% | 66,517 | 95.2% | 68,434 | 102.9% |
| 営業総利益率 Operating gross margin ratio | 35.3% | △0.3 | 34.2% | △1.1 | 34.4% | +0.2 |
| 売上総利益 Gross profit | 62,855 | 99.6% | 59,501 | 94.7% | 61,369 | 103.1% |
| 売上総利益率 Gross margin ratio | 32.9% | △0.3 | 31.8% | △1.1 | 32.0% | +0.2 |
| 販売費及び一般管理費 Selling, general and administrative expenses | 52,777 | 100.9% | 52,689 | 99.8% | 53,617 | 101.8% |
| 人件費 Labor expenses | 23,584 | 97.7% | 23,388 | 99.2% | 23,860 | 102.0% |
| 販売費 Selling expenses | 6,918 | 103.6% | 6,584 | 95.2% | 6,436 | 97.7% |
| 設備費 Equipment expenses | 16,916 | 104.0% | 17,262 | 102.0% | 17,834 | 103.3% |
| その他経費 Other | 5,357 | 102.8% | 5,454 | 101.8% | 5,487 | 100.6% |
| 販管比率 SG&A expenses to operating revenue | 26.7% | +0.1 | 27.1% | +0.4 | 27.0% | △0.1 |
| 営業利益 Operating profit | 17,076 | 96.2% | 13,827 | 81.0% | 14,816 | 107.2% |
| 営業利益率 Operating profit ratio | 8.6% | △0.4 | 7.1% | △1.5 | 7.5% | +0.4 |
| 経常利益 Ordinary profit | 16,508 | 92.4% | 13,817 | 83.7% | 14,563 | 105.4% |
| 経常利益率 Ordinary profit ratio | 8.3% | △0.8 | 7.1% | △1.2 | 7.3% | +0.2 |
| 親会社株主に帰属する四半期純利益 Profit attributable to owners of parent | 11,302 | 94.0% | 9,242 | 81.8% | 9,562 | 103.5% |
| 親会社株主に帰属する四半期純利益率 Profit ratio attributable to owners of parent | 5.7% | △0.4 | 4.8% | △0.9 | 4.8% | +0.0 |

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% | 91,354 | 101.3% | - | - | - | - |
| 売上高 Net Sales | 103,825 | 103.4% | 87,914 | 101.3% | - | - | - | - |
| 営業収入 Real estate lease revenue, etc. | 3,624 | 100.2% | 3,440 | 101.2% | - | - | - | - |
| 営業総利益 Operating gross profit | 36,158 | 104.5% | 32,275 | 101.1% | - | - | - | - |
| 営業総利益率 Operating gross margin ratio | 33.7% | +0.5 | 35.3% | △0.1 | - | - | - | - |
| 売上総利益 Gross profit | 32,534 | 105.0% | 28,834 | 101.1% | - | - | - | - |
| 売上総利益率 Gross margin ratio | 31.3% | +0.5 | 32.8% | +0.0 | - | - | - | - |
| 販売費及び一般管理費 Selling, general and administrative expenses | 26,696 | 102.0% | 26,921 | 101.5% | - | - | - | - |
| 人件費 Labor expenses | 11,853 | 102.3% | 12,006 | 101.7% | - | - | - | - |
| 販売費 Selling expenses | 3,334 | 96.5% | 3,101 | 99.2% | - | - | - | - |
| 設備費 Equipment expenses | 8,724 | 103.7% | 9,110 | 102.9% | - | - | - | - |
| その他経費 Other | 2,784 | 102.8% | 2,702 | 98.5% | - | - | - | - |
| 販管比率 SG&A expenses to operating revenue | 24.8% | △0.3 | 29.5% | +0.1 | - | - | - | - |
| 営業利益 Operating profit | 9,462 | 112.1% | 5,354 | 99.4% | - | - | - | - |
| 営業利益率 Operating profit ratio | 8.8% | +0.7 | 5.9% | △0.1 | - | - | - | - |
| 経常利益 Ordinary profit | 9,659 | 115.0% | 4,904 | 90.5% | - | - | - | - |
| 経常利益率 Ordinary profit ratio | 9.0% | +0.9 | 5.4% | △0.6 | - | - | - | - |
| 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% | 2,999 | 83.6% | - | - | - | - |
| 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 | 3.3% | △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2Q 2022.4.1～2022.9.30 | | 2024年3月期第2Q 2023.4.1～2023.9.30 | | 2025年3月期第2Q 2024.4.1～2024.9.30 | |
|---|-----------------------------------|------------|-----------------------------------|------------|-----------------------------------|------------|
| | 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 | 354,238 | 101.0% | 357,707 | 101.0% | 367,611 | 102.8% |
| 純資産 Net assets | 222,576 | 105.2% | 233,038 | 104.7% | 242,591 | 104.1% |
| 自己資本比率 Equity ratio | 62.8% | +2.5 | 65.1% | +2.3 | 66.0% | +0.9 |
| 有利子負債 Interest-bearing liability | 28,218 | 67.9% | 25,236 | 89.4% | 26,142 | 103.6% |
| うち、リース債務 inside, Lease obligations | 4,587 | 103.6% | 4,936 | 107.6% | 4,918 | 99.6% |
| 減価償却費 Depreciation expense | 5,800 | 100.1% | 6,021 | 103.8% | 6,234 | 103.5% |
| 営業キャッシュ・フロー Cash flows from operating activities | 16,324 | 98.4% | 15,649 | 95.9% | 14,065 | 89.9% |
| 投資キャッシュ・フロー Cash flows from investing activities | △5,817 | 132.8% | △8,815 | 151.5% | △7,285 | 82.6% |
| 財務キャッシュ・フロー Cash flows from financing activities | △11,738 | 224.0% | △8,478 | +72.2 | △10,673 | 125.9% |
| 総資産経常利益率 ROA | 7.6% | △0.3 | 6.5% | △1.1 | 6.3% | △0.2 |
| 自己資本当期純利益率 ROE | 7.9% | △1.1 | 6.6% | △1.3 | 5.9% | △0.7 |
| 1株当たり当期純利益 Earnings per share | 232.33円 | △9.55円 | 192.40円 | △39.93円 | 201.29円 | +8.89円 |
| 1株当たり純資産 Net assets per share | 4,584.18円 | +332.46円 | 4,875.19円 | +291.01円 | 5,120.18円 | +244.99円 |
| 出退店数(4～9月) Number of stores opened and closed | 店数 Stores | - | 店数 Stores | - | 店数 Stores | - |
| 出店数(4～9月) Number of store openings | 3店 | - | 6店 | - | 8店 | - |
| 閉店数(4～9月) Number of stores closed | 4店 | - | 3店 | - | 6店 | - |
| 期末店舗数 Number of stores at the end of the period | 1,213店 | - | 1,217店 | - | 1,222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2Q 2023.4.1～2023.9.30 | | 2025年3月期第2Q 2024.4.1～2024.9.30 | | |
|--|-----------------------------------|--------------|-----------------------------------|--------------|------------|
| | 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 | 34,147 | 17.6% | 35,428 | 17.8% | 103.8% |
| リフォーム資材・エクステリア用品 Exterior goods and goods for remodeling | 28,358 | 14.6% | 28,604 | 14.4% | 100.9% |
| 園芸・農業・ペット用品 Gardening and agricultural and pet supplies | 67,882 | 34.9% | 69,211 | 34.8% | 102.0% |
| 日用品・家電・カー・レジャー用品 Commodities and appliances and outdoor goods | 35,905 | 18.5% | 37,879 | 19.1% | 105.5% |
| インテリア・家庭・オフィス用品 Interior goods and cleaning supplies | 17,104 | 8.8% | 16,884 | 8.5% | 98.7% |
| 燃料他 Fuel,etc | 1,868 | 1.0% | 1,701 | 0.9% | 91.1% |
| その他 Real estate lease revenue,etc. | 7,006 | 3.6% | 7,054 | 3.5% | 100.7% |
| ホームセンター事業計 Homecenter business total sales | 192,272 | 99.0% | 196,765 | 99.0% | 102.3% |
| その他事業 Other business | 2,005 | 1.0% | 2,039 | 1.0% | 101.7% |
| 営業収益 Operating revenue | 194,277 | 100.0% | 198,804 | 100.0% | 102.3% |

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2Q 2023.4.1～2023.9.30 | | 2025年3月期第2Q 2024.4.1～2024.9.30 | | |
|--|-----------------------------------|--------------|-----------------------------------|------------|--------------|
| | 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 | 14,410 | 42.2% | 15,042 | 104.4% | 42.5% |
| リフォーム資材・エクステリア用品 Exterior goods and goods for remodeling | 8,038 | 28.3% | 8,229 | 102.4% | 28.8% |
| 園芸・農業・ペット用品 Gardening and agricultural and pet supplies | 20,308 | 29.9% | 20,982 | 103.3% | 30.3% |
| 日用品・家電・カー・レジャー用品 Commodities and appliances and outdoor goods | 9,080 | 25.3% | 9,701 | 106.8% | 25.6% |
| インテリア・家庭・オフィス用品 Interior goods and cleaning supplies | 6,781 | 39.6% | 6,613 | 97.5% | 39.2% |
| 燃料他 Fuel,etc | 254 | 13.6% | 196 | 77.1% | 11.5% |
| その他 Real estate lease revenue,etc. | 7,006 | 100.0% | 7,054 | 100.7% | 100.0% |
| ホームセンター事業計 Homecenter business gross profit | 65,880 | 34.3% | 67,821 | 102.9% | 34.5% |
| その他事業 Other business | 636 | 31.8% | 613 | 96.3% | 30.1% |
| 営業総利益 Operating gross profit | 66,517 | 34.2% | 68,434 | 102.9% | 34.4% |

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

| | | 2023年3月期第2Q 2022.4.1～2022.9.30 | | 2024年3月期第2Q 2023.4.1～2023.9.30 | | 2025年3月期第2Q 2024.4.1～2024.9.30 | |
|-----|--|-----------------------------------|--------------------|-----------------------------------|--------------------|-----------------------------------|--------------------|
| | | 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 | 101.5% | 98.5% | 99.3% | 98.3% | 103.4% | 101.6% |
| | 客数前年比 Number of customers YoY | 96.6% | 95.9% | 95.3% | 94.5% | 99.5% | 97.9% |
| | 客単価前年比 Customer unit price YoY | 105.1% | 104.8% | 104.2% | 104.0% | 104.0% | 103.8% |
| PRO | 売上高前年比 Sales YoY | 150.4% | 105.5% | 120.4% | 108.0% | 140.3% | 108.2% |
| | 客数前年比 Number of customers YoY | 141.5% | 95.9% | 114.7% | 100.8% | 138.7% | 103.7% |
| | 客単価前年比 Customer unit price YoY | 106.3% | 110.1% | 105.1% | 107.2% | 101.1% | 104.4% |
| H&G | 売上高前年比 Sales YoY | 99.5% | 99.4% | 97.5% | 97.0% | 101.2% | 100.8% |
| | 客数前年比 Number of customers YoY | 93.9% | 93.9% | 93.3% | 93.0% | 97.1% | 96.9% |
| | 客単価前年比 Customer unit price YoY | 106.0% | 105.8% | 104.5% | 104.3% | 104.2% | 104.1% |
| 合計 | 売上高前年比 Sales YoY | 100.4% | 99.1% | 98.2% | 97.5% | 102.4% | 101.2% |
| | 灯油除く売上高前年比 Sales excluding kerosene YoY | 100.3% | 99.0% | 98.3% | 97.6% | 102.5% | 101.3% |
| | 客数前年比 Number of customers YoY | 94.7% | 94.0% | 93.8% | 93.4% | 98.0% | 97.2% |
| | 客単価前年比 Customer unit price YoY | 106.0% | 105.5% | 104.6% | 104.4% | 104.5% | 104.1% |

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

2024年9月30日現在

As of September 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 | 3 | | 18 | | 21 | 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 | 2 | 11 | | 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 | 2 | | 38 | | 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 | 106 | 17 | 1,095 | 4 | 1,222 |

※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)