



2015年2月期

第1四半期決算補足資料（第90期）

Brief Summary

First Quarter of the Fiscal Year Ending Feb. 28, 2015

イオン株式会社
AEON CO., LTD.

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* 金額については百万円未満を切り捨てとしています。
(Figures are rounded down in millions.)

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イオンリテール株式会社 (AEON Retail Co., Ltd.)

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The information presented in these materials represents Aeon's views at the time of the release of its financial results, and Aeon makes no guarantees, warranties, or representations as to the accuracy or completeness of the information. Further, these materials contain forward-looking statements including projections based on assumptions, forecasts, and future plans. Actual results may differ from expectations and the projections presented in these materials due to certain risks and uncertainties, including, but not limited to, changes in the global economy and fluctuations in foreign currency exchange rates and so on. Please refer to these materials in conjunction with Aeon's earnings reports and other disclosure documents.

連結 (CONSOLIDATED RESULTS)

連結 (CONSOLIDATED RESULTS)

1. 決算概要 (Financial Highlights)

百万円(Millions of Yen)

| | 2013/5 | | 2014/5 | | 2015/2 予想(Forecast) | |
|--|------------------------------------|----------------------|------------------------------------|----------------------|---------------------|----------------------|
| | 金額 Amount | 前年同期増減 YoY Change | 金額 Amount | 前年同期増減 YoY Change | 金額 Amount | 前年同期増減 YoY Change |
| 営業収益 Operating Revenue | 1,461,680 | +9.9% | 1,713,032 | +17.2% | 7,000,000 | +9.5% |
| 営業利益 Operating Income | 34,723 | +9.8% | 22,471 | ▲35.3% | 200,000 ~210,000 | +16.7% ~+22.5% |
| 経常利益 Ordinary Income | 38,141 | +4.7% | 25,167 | ▲34.0% | 200,000 ~210,000 | +13.1% ~+18.7% |
| 税金等調整前当期純利益 Income before Income Taxes and Minority Interests | 36,989 | +2.8% | 23,941 | ▲35.3% | - | - |
| 四半期(または通期)純利益 Net Income | 13,170 | +0.8% | 1,310 | ▲90.1% | 48,000 | +5.3% |
| 1株当り当期純利益 EPS | 円(Yen) 16.59 | ▲2.4% | 円(Yen) 1.56 | ▲90.6% | 円(Yen) 57.29 | |
| 期中平均株式数 Average Number of Shares Outstanding | 千株(Shares in thousands) 793,899 | +3.2% | 千株(Shares in thousands) 838,036 | +5.6% | | |
| 総資産 Total Assets | 6,232,836 | +46.0% | 7,000,710 | +12.3% | | |
| 純資産 Net Assets | 1,497,138 | +17.6% | 1,669,312 | +11.5% | | |
| 連結有利子負債 Consolidated Interest-bearing Debt | 1,676,112 | +21.5% | 1,585,581 | ▲5.4% | | |
| (総合金融事業有利子負債) Financial Services Business | (609,867) | +12.7% | (643,745) | +5.6% | | |
| (総合金融事業除く有利子負債) Excl. Financial Services Business | (1,066,245) | +27.3% | (941,836) | ▲11.7% | | |

2. 経費明細 (Selling, General and Administrative Expenses)

百万円(Millions of Yen)

| | 2013/5 | | | 2014/5 | | |
|--|--------------|---------------------------------|----------------------|--------------|---------------------------------|----------------------|
| | 金額 Amount | 営業収益比 % of Operating Revenue | 前年同期増減 YoY Change | 金額 Amount | 営業収益比 % of Operating Revenue | 前年同期増減 YoY Change |
| 人件費 Personnel Costs | 202,692 | 13.9% | +9.5% | 241,931 | 14.1% | +19.4% |
| 販促費 Advertising Costs | 33,013 | 2.3% | +15.7% | 45,012 | 2.6% | +36.3% |
| 販売費 Selling Costs | 18,773 | 1.3% | +3.6% | 26,736 | 1.6% | +42.4% |
| 販売促進費 Advertising and Selling Costs | 51,786 | 3.5% | +11.0% | 71,749 | 4.2% | +38.5% |
| 設備費 Facilities Costs | 163,234 | 11.2% | +8.5% | 201,082 | 11.7% | +23.2% |
| 一般費 General Costs | 55,628 | 3.8% | +19.8% | 66,252 | 3.9% | +19.1% |
| 合計 Total | 473,342 | 32.4% | +10.4% | 581,015 | 33.9% | +22.7% |

連結 (CONSOLIDATED RESULTS)

3. 金融収支の状況 (Financial Position)

百万円(Millions of Yen)

| | 2013/5 | | 2014/5 | |
|--|--------------|----------------------|--------------|----------------------|
| | 金額 Amount | 前年同期増減 YoY Change | 金額 Amount | 前年同期増減 YoY Change |
| 受取利息 Interest Income | 942 | +29.2% | 748 | ▲20.5% |
| 受取配当金 Dividends Income | 524 | +113.9% | 312 | ▲40.5% |
| 小計 (A) Financial Income | 1,466 | +50.5% | 1,060 | ▲27.7% |
| 支払利息 Interest Expenses | 2,466 | +23.2% | 2,094 | ▲15.1% |
| 社債利息 Interest on Bonds | 930 | +17.1% | 846 | ▲9.1% |
| コマーシャルペーパー支払利息 Interest on Commercial Paper | 20 | +169.0% | 0 | ▲97.5% |
| 小計 (B) Financial Expenses | 3,418 | +21.9% | 2,941 | ▲13.9% |
| 金融収支 (A) - (B) Net Financial Charges | ▲1,952 | - | ▲1,880 | - |

4. 特別利益・特別損失 (Extraordinary Income and Loss)

百万円(Millions of Yen)

| | 2013/5 | | 2014/5 | |
|--|--------------|----------------------|--------------|----------------------|
| | 金額 Amount | 前年同期増減 YoY Change | 金額 Amount | 前年同期増減 YoY Change |
| 持分変動利益 Gain on Change in Equity | 1,383 | / | 444 | / |
| 店舗閉鎖損失引当金戻入額 Reversal of Provision for Loss on Store Closing | - | | 1,219 | |
| その他特別利益 Other Extraordinary Income | 569 | | 822 | |
| 特別利益合計 Total Extraordinary Income | 1,953 | ▲22.9% | 2,486 | +27.3% |
| 減損損失 Impairment Loss | 480 | / | 1,499 | / |
| 店舗閉鎖損失引当金繰入額 Provision for Loss on Store Closing | 197 | | 972 | |
| 総合金融事業における経営統合費用 Management Integration Expenses from Financial Services Business | 728 | | - | |
| その他特別損失 Other Extraordinary Losses | 1,700 | | 1,239 | |
| 特別損失合計 Total Extraordinary Losses | 3,105 | +3.9% | 3,711 | +19.5% |

連結 (CONSOLIDATED RESULTS)

5. 連結有利子負債の状況 (Consolidated Interest-bearing Debt)

百万円(Millions of Yen)

| | 2013/5 | | 2014/5 | |
|--|--------------|----------------------|--------------|----------------------|
| | 金額 Amount | 前年同期増減 YoY Change | 金額 Amount | 前年同期増減 YoY Change |
| 長期借入金(1年以内返済予定分を含む) Long-term Debt | 1,011,987 | +18.3% | 1,005,950 | ▲0.6% |
| 短期借入金 Short-term Debt | 225,208 | +115.8% | 204,827 | ▲9.0% |
| コマーシャル・ペーパー Commercial Paper | 62,500 | +88.2% | - | ▲100.0% |
| 借入金 計 Subtotal | 1,299,695 | +30.9% | 1,210,778 | ▲6.8% |
| 社債(1年以内償還予定分を含む) Corporate Bonds | 284,231 | +4.9% | 329,060 | +15.8% |
| 新株予約権付社債(1年以内償還予定分を含む) Convertible Bonds with Stock Acquisition Rights | 61,294 | ▲36.3% | 2,820 | ▲95.4% |
| 社債 計 Subtotal | 345,525 | ▲5.9% | 331,880 | ▲3.9% |
| リース債務(1年以内返済予定分を含む) Lease Obligations | 23,952 | +27.9% | 32,210 | +34.5% |
| 割賦長期設備未払金(割賦設備未払金を含む) Accounts Payable for Capital Expenditures Installment | 6,938 | - | 10,711 | +54.4% |
| その他 計 Subtotal | 30,890 | +64.9% | 42,922 | +38.9% |
| 合 計 Total | 1,676,112 | +21.5% | 1,585,581 | ▲5.4% |

〔ご参考〕 イオン株式会社発行の社債明細 (Outstanding Corporate Bonds of AEON CO., LTD.)

百万円(Millions of Yen)

| | 利率 Coupon | 償還日 Maturity Date | 2014/2 Outstanding | 2014/5 Outstanding |
|--|--------------|----------------------|-----------------------|-----------------------|
| 第13回無担保社債 #13 Unsecured Straight Bond | 2.590% | 2025/6/20 | 15,000 | 15,000 |
| 第14回無担保社債 #14 Unsecured Straight Bond | 1.600% | 2015/6/22 | 20,000 | 20,000 |
| 第15回無担保社債 #15 Unsecured Straight Bond | 1.590% | 2014/6/30 | 34,000 | 34,000 |
| 第16回無担保社債 #16 Unsecured Straight Bond | 1.010% | 2018/11/21 | 20,000 | 20,000 |
| 第17回無担保社債 #17 Unsecured Straight Bond | 0.720% | 2019/8/9 | 20,000 | 20,000 |
| 第18回無担保社債 #18 Unsecured Straight Bond | 1.150% | 2022/8/9 | 20,000 | 20,000 |
| 第2回(劣後特約付)無担保社債 #2 Subordinated Bond | (※) | 2056/9/29 | 26,500 | 26,500 |
| 合計 Total | | | 155,500 | 155,500 |

※ 2016年9月29日まで6ヶ月ユーロ円ライボ+1.40%、2016年9月29日の翌日以降は6ヶ月ユーロ円ライボ+2.40%。

Coupon: 6-Month Euro Yen LIBOR plus 1.40% per annum until Sep. 29, 2016 and 6-Month Euro Yen LIBOR plus 2.40% after Sep. 30, 2016.

連結 (CONSOLIDATED RESULTS)

6. 連結キャッシュ・フロー計算書 (Consolidated Cash Flow Statement)

億円 (Hundred Millions of Yen)

| 主要項目のみ表示 Condensed | 2013/5 | 2014/5 | 前年同期増減 YoY Change | 備考 Comment |
|---|--------|--------|----------------------|-------------------------------|
| 営業活動によるキャッシュフロー Cash Flow from Operating Activities | 1,734 | 506 | ▲1,227 | |
| 税金等調整前四半期純利益 Income before Income Taxes and Minority Interests | 369 | 239 | ▲130 | |
| 減価償却費 Depreciations and Amortization | 413 | 456 | +43 | |
| 運転資金の増減 Change in Working Capital | 303 | 480 | +176 | 売上債権、棚卸資産、営業貸付金、仕入債務の増減 |
| 銀行業における預金・貸出金増減 Change in Deposit and Loans for Banking Business | 341 | ▲1,124 | ▲1,465 | 預金の減少 ▲2,945 貸出金の減少 ▲1,480 |
| 法人税等の支払額 Income Taxes Paid | ▲406 | ▲501 | ▲94 | |
| その他 Others | 712 | 956 | +243 | 前払費用、未払金、未払費用、前受金、預り金等の増減 |
| 投資活動によるキャッシュフロー Cash Flow from Investing Activities | ▲1,305 | ▲836 | +468 | |
| 設備投資 CAPEX | ▲1,268 | ▲1,104 | +164 | 有形固定資産取得、差入保証金差入 |
| 株式投資 Stock Investment | ▲310 | ▲2 | +308 | |
| その他 Others | 274 | 270 | ▲4 | |
| 財務活動によるキャッシュフロー Cash Flow from Financing Activities | 9 | ▲87 | ▲96 | |
| 現金及び現金同等物の増減額 Cash and Cash Equivalents at the end of period | 529 | ▲459 | ▲989 | |

7. トップバリュ売上実績 (Sales Results of TOPVALU)

億円 (Hundred Millions of Yen)

| | 2013/5 | | 2014/5 | |
|---|-------------|----------------------|-------------|----------------------|
| | 売上 Sales | 前年同期増減 YoY Change | 売上 Sales | 前年同期増減 YoY Change |
| トップバリュ グループ計 Total TOPVALU Sales of Aeon Group | 1,739 | +14.1% | 1,938 | +11.4% |

連結 (CONSOLIDATED RESULTS)

8. セグメント情報 (Segment Information)

(1) 事業の種類別セグメント情報 (Business Segment Information)

百万円(Millions of Yen)

| | | 2013/5 | | | 2014/5 | | |
|--|--------------------------|--------------|----------------------|--------------|--------------|----------------------|--------------|
| | | 金額 Amount | 前年同期増減 YoY Change | 構成比 Share | 金額 Amount | 前年同期増減 YoY Change | 構成比 Share |
| GMS事業 | 営業収益 (Operating Revenue) | 651,051 | +4.1% | 44.5% | 843,223 | +29.5% | 49.2% |
| General Merchandise Store Business | 営業利益 (Operating Income) | 3,520 | +106.8% | 10.1% | ▲ 3,804 | - | ▲ 16.9% |
| SM・DS・小型店事業 | 営業収益 (Operating Revenue) | 468,766 | - | 32.1% | 507,008 | +8.2% | 29.6% |
| Supermarket・Discount Store・Small Size Store Business | 営業利益 (Operating Income) | 479 | - | 1.4% | ▲ 2,253 | - | ▲ 10.0% |
| 総合金融事業 | 営業収益 (Operating Revenue) | 62,926 | +44.7% | 4.3% | 74,283 | +18.0% | 4.4% |
| Financial Services Business | 営業利益 (Operating Income) | 8,490 | +33.8% | 24.5% | 9,730 | +14.6% | 43.3% |
| ディベロッパー事業 | 営業収益 (Operating Revenue) | 53,257 | +9.1% | 3.7% | 60,198 | +13.0% | 3.5% |
| SC Development Business | 営業利益 (Operating Income) | 11,092 | +7.5% | 31.9% | 10,009 | ▲9.8% | 44.5% |
| サービス・専門店事業 | 営業収益 (Operating Revenue) | 177,380 | - | 12.1% | 182,989 | +3.2% | 10.7% |
| Service・Specialty Store Business | 営業利益 (Operating Income) | 6,851 | - | 19.7% | 7,534 | +10.0% | 33.5% |
| アセアン事業 | 営業収益 (Operating Revenue) | 43,127 | +90.8% | 3.0% | 50,257 | +16.5% | 2.9% |
| ASEAN Business | 営業利益 (Operating Income) | 1,584 | +15.1% | 4.6% | 964 | ▲39.2% | 4.3% |
| 中国事業 | 営業収益 (Operating Revenue) | 34,111 | +15.4% | 2.3% | 42,259 | +23.9% | 2.5% |
| China Business | 営業利益 (Operating Income) | ▲ 832 | - | ▲ 2.4% | ▲ 712 | - | ▲ 3.2% |
| その他 | 営業収益 (Operating Revenue) | 40,079 | - | 2.7% | 43,370 | +8.2% | 2.5% |
| Others | 営業利益 (Operating Income) | 254 | - | 0.7% | 35 | ▲86.1% | 0.2% |
| 調整額 | 営業収益 (Operating Revenue) | ▲ 69,017 | - | ▲ 4.7% | ▲ 90,556 | - | ▲ 5.3% |
| Adjustments | 営業利益 (Operating Income) | 3,281 | - | 9.5% | 969 | ▲70.5% | 4.3% |
| 合計 | 営業収益 (Operating Revenue) | 1,461,680 | +9.9% | 100.0% | 1,713,032 | +17.2% | 100.0% |
| Total | 営業利益 (Operating Income) | 34,723 | +9.8% | 100.0% | 22,471 | ▲35.3% | 100.0% |

※調整額には商品機能、全社、消去等の数値が含まれています。

Adjustments include figures of shared function companies, corporate and eliminations.

(2) 事業セグメント別設備投資実績 (CAPEX by Business Segments)

百万円(Millions of Yen)

| | 2013/5 | 2014/5 | 前年同期増減 YoY Change |
|--|---------|---------|----------------------|
| GMS事業 | 23,814 | 22,873 | ▲941 |
| General Merchandise Store Business | | | |
| SM・DS・小型店事業 | 14,532 | 14,056 | ▲476 |
| Supermarket・Discount Store・Small Size Store Business | | | |
| 総合金融事業 | 9,293 | 7,928 | ▲1,364 |
| Financial Services Business | | | |
| ディベロッパー事業 | 62,656 | 48,074 | ▲14,581 |
| SC Development Business | | | |
| サービス・専門店事業 | 5,553 | 6,267 | +713 |
| Service・Specialty Store Business | | | |
| アセアン事業 | 5,287 | 6,130 | +843 |
| ASEAN Business | | | |
| 中国事業 | 903 | 1,062 | +158 |
| China Business | | | |
| その他 | 4,835 | 4,039 | ▲795 |
| Others | | | |
| 連結設備投資合計 | 126,876 | 110,432 | ▲16,443 |
| Capex Total | | | |
| ※株式投資 | 31,078 | 211 | ▲30,867 |
| Equity Investment | | | |
| 連結投資合計 | 157,955 | 110,644 | ▲47,310 |
| Investment Total | | | |

※株式投資は株式取得額より株式取得会社の保有現預金を差し引いた金額を記載しています。

The amounts of "Equity investment" is calculated as follows: Acquisition costs minus "Cash and Cash equivalent" held by acquired company.

連結 (CONSOLIDATED RESULTS)

(3) 地域ごとの情報 (Geographical Segment Information)

百万円(Millions of Yen)

| | | 2013/5 | | | 2014/5 | | |
|--------|--------------------------|--------------|----------------------|--------------|--------------|----------------------|--------------|
| | | 金額 Amount | 前年同期増減 YoY Change | 構成比 Share | 金額 Amount | 前年同期増減 YoY Change | 構成比 Share |
| 日本 | 営業収益 (Operating Revenue) | 1,347,096 | +7.6% | 92.2% | 1,574,491 | +16.9% | 91.9% |
| Japan | 営業利益 (Operating Income) | 30,824 | +12.9% | 88.8% | 19,394 | ▲37.1% | 86.3% |
| アセアン | 営業収益 (Operating Revenue) | 60,345 | +79.0% | 4.1% | 71,027 | +17.7% | 4.2% |
| ASEAN | 営業利益 (Operating Income) | 5,559 | +58.6% | 16.0% | 5,157 | ▲7.2% | 23.0% |
| 中国 | 営業収益 (Operating Revenue) | 39,181 | +17.3% | 2.7% | 49,692 | +26.8% | 2.9% |
| China | 営業利益 (Operating Income) | ▲1,496 | - | ▲4.3% | ▲1,764 | - | ▲7.9% |
| その他 | 営業収益 (Operating Revenue) | 15,056 | +26.2% | 1.0% | 17,821 | +18.4% | 1.0% |
| Others | 営業利益 (Operating Income) | ▲164 | - | ▲0.5% | ▲316 | - | ▲1.4% |
| 合計 | 営業収益 (Operating Revenue) | 1,461,680 | +9.9% | 100.0% | 1,713,032 | +17.2% | 100.0% |
| Total | 営業利益 (Operating Income) | 34,723 | +9.8% | 100.0% | 22,471 | ▲35.3% | 100.0% |

※営業利益については、地域を報告セグメントとした場合の数値(参考値)を記載しております。

Operating incomes here are just for reference.

(4) 地域ごとの設備投資実績 (CAPEX by Geographic Segments)

百万円(Millions of Yen)

| | 2013/5 | 2014/5 | 前年同期増減 YoY Change |
|--------|---------|---------|----------------------|
| 日本 | 117,296 | 88,003 | ▲29,293 |
| Japan | | | |
| アセアン | 6,198 | 14,518 | +8,319 |
| ASEAN | | | |
| 中国 | 2,799 | 6,364 | +3,565 |
| China | | | |
| その他 | 581 | 1,545 | +964 |
| Others | | | |
| 合計 | 126,876 | 110,432 | ▲16,443 |
| Total | | | |

連結 (CONSOLIDATED RESULTS)

9. 事業別明細 (Breakdown by Operating Segment)

※各事業の合計は、マネジメント・アプローチに基づく数値です。複数事業を営む事業会社は、それぞれが主要とする事業に属します。

Figures of Business total based on management approach. Companies operating plural operations belong to the business segment where the company has its main operation.

百万円(Millions of Yen)

| | 営業収益 Operating Revenue | | | 営業利益 Operating Income | | | 経常利益 Ordinary Income | | | 四半期純利益 Net Income | | | 総資産 Total Assets | 持分比率 % of Shareholding |
|---|---------------------------|------------------|----------------------|--------------------------|----------------|--------------|-------------------------|----------------|--------------|----------------------|----------------|--------------|---------------------|---------------------------|
| | 2013/5 | 2014/5 | 前年同期増減 YoY Change | 2013/5 | 2014/5 | 増減 Change | 2013/5 | 2014/5 | 増減 Change | 2013/5 | 2014/5 | 増減 Change | | |
| イオンリテール(株) AEON Retail Co., Ltd. | 521,335 | 531,747 | +2.0% | 2,053 | ▲ 2,090 | ▲4,144 | 3,832 | ▲ 835 | ▲4,668 | 4,213 | ▲ 1,347 | ▲5,561 | 1,175,751 | 100.00 |
| (株)ダイエー [連結] (※1) The Dai-ichi, Inc. [Consolidated] | - | 191,734 | - | - | ▲ 3,982 | - | - | ▲ 4,137 | - | - | ▲ 3,231 | - | 331,718 | 44.19 |
| イオン北海道(株) AEON Hokkaido Corporation | 39,197 | 40,007 | +2.1% | 2,297 | 2,276 | ▲21 | 2,231 | 2,226 | ▲5 | 1,342 | 1,316 | ▲26 | 88,717 | 70.37 |
| (株)サンデー [連結] SUNDAY CO., LTD. [Consolidated] | 11,823 | 12,748 | +7.8% | 194 | 480 | +266 | 195 | 474 | +278 | 119 | 286 | +166 | 31,397 | 77.04 |
| イオン九州(株) AEON KYUSHU CO., LTD. | 59,856 | 60,130 | +0.5% | ▲ 388 | ▲ 1,332 | ▲944 | ▲ 166 | ▲ 802 | ▲636 | ▲ 151 | ▲ 607 | ▲456 | 112,854 | 69.81 |
| GMS事業 General Merchandise Store Business | 651,051 | 843,223 | +29.5% | 3,520 | ▲ 3,804 | ▲7,325 | - | - | - | - | - | - | - | - |
| マックスバリュ北海道(株) Maxvalu Hokkaido Co., Ltd. | 21,859 | 24,021 | +9.9% | 43 | 104 | +61 | 56 | 130 | +74 | 36 | 58 | +21 | 28,208 | 61.22 |
| マックスバリュ東北(株) Maxvalu Tohoku Co., Ltd. | 23,938 | 27,986 | +16.9% | 180 | 47 | ▲133 | 208 | 43 | ▲165 | 103 | ▲ 25 | ▲129 | 26,895 | 71.10 |
| マックスバリュ東海(株) [連結] Maxvalu Tokai Co., Ltd. [Consolidated] | 49,611 | 51,526 | +3.9% | 460 | 557 | +97 | 457 | 547 | +90 | 303 | 234 | ▲69 | 70,703 | 69.73 |
| マックスバリュ西日本(株) [連結] Maxvalu Nishinippon Co., Ltd. [Consolidated] | 64,567 | 66,221 | +2.6% | ▲ 14 | ▲ 77 | ▲63 | 28 | ▲ 37 | ▲65 | ▲135 | ▲ 182 | ▲47 | 90,674 | 61.82 |
| マックスバリュ中部(株) [連結] Maxvalu Chubu Co., Ltd. [Consolidated] | 37,395 | 39,602 | +5.9% | 23 | ▲ 422 | ▲446 | 35 | ▲ 415 | ▲450 | 202 | ▲ 377 | ▲580 | 48,574 | 66.77 |
| マックスバリュ九州(株) [連結] Maxvalu Kyushu Co., Ltd. [Consolidated] | - | 35,616 | - | - | ▲ 14 | - | - | ▲ 1 | - | - | ▲ 63 | - | 34,519 | 78.10 |
| ミニストップ(株) [連結] MINISTOP CO., LTD. [Consolidated] | 33,307 | 36,842 | +10.6% | 240 | ▲ 232 | ▲472 | 563 | 58 | ▲505 | 113 | ▲ 225 | ▲338 | 132,179 | 51.68 |
| SM・DS・小型店事業 Supermarket・Discount Store・Small Size Store Business | 468,766 | 507,008 | +8.2% | 479 | ▲ 2,253 | ▲2,732 | - | - | - | - | - | - | - | - |
| 総合金融事業 (※2) Financial Services Business | 62,926 | 74,283 | +18.0% | 8,490 | 9,730 | +1,240 | - | - | - | - | - | - | - | - |
| イオンモール(株) [連結] AEON Mall Co., Ltd. [Consolidated] | 42,753 | 48,995 | +14.6% | 10,939 | 9,958 | ▲981 | 10,717 | 9,628 | ▲1,089 | 6,254 | 5,575 | ▲679 | 804,046 | 49.65 |
| デベロッパー事業 SC Development Business | 53,257 | 60,198 | +13.0% | 11,092 | 10,009 | ▲1,083 | - | - | - | - | - | - | - | - |
| イオンデライト(株) [連結] AEON DELIGHT CO., LTD. [Consolidated] | 66,711 | 66,475 | ▲0.4% | 3,390 | 3,540 | +150 | 3,403 | 3,558 | +155 | 1,858 | 2,015 | +157 | 116,532 | 62.70 |
| (株)イオンファンタジー [連結] AEON Fantasy Co., Ltd. [Consolidated] | 11,398 | 11,425 | +0.2% | 377 | 522 | +144 | 422 | 479 | +57 | 148 | 184 | +35 | 26,916 | 65.36 |
| (株)ツヴァイ [連結] ZWEI CO., LTD. [Consolidated] | 1,025 | 945 | ▲7.8% | 2 | ▲ 6 | ▲9 | 19 | 10 | ▲8 | 18 | 0 | ▲18 | 4,919 | 67.44 |
| (株)ジーフット GFOOT CO., LTD. | 26,244 | 29,422 | +12.1% | 1,334 | 1,933 | +599 | 1,328 | 1,930 | +602 | 716 | 1,123 | +407 | 60,148 | 73.96 |
| (株)コックス [連結] COX CO., LTD. [Consolidated] | 5,728 | 5,714 | ▲0.2% | ▲ 230 | 100 | +330 | ▲ 164 | 149 | +314 | ▲ 222 | 76 | +299 | 20,962 | 68.79 |
| サービス・専門店事業 Service・Specialty Store Business | 177,380 | 182,989 | +3.2% | 6,851 | 7,534 | +682 | - | - | - | - | - | - | - | - |
| アセアン事業 (※3) ASEAN Business | 43,127 | 50,257 | +16.5% | 1,584 | 964 | ▲620 | - | - | - | - | - | - | - | - |
| 中国事業 China Business | 34,111 | 42,259 | +23.9% | ▲ 832 | ▲ 712 | +119 | - | - | - | - | - | - | - | - |
| (株)CFSコーポレーション CFS Corporation | 28,876 | 30,643 | +6.1% | 397 | 619 | +222 | 429 | 645 | +216 | 222 | 284 | +62 | 45,283 | 50.07 |
| その他の事業 Other Business | 40,079 | 43,370 | +8.2% | 254 | 35 | ▲219 | - | - | - | - | - | - | - | - |
| 調整額 Adjustments | ▲ 69,017 | ▲ 90,556 | - | 3,281 | 969 | ▲2,312 | - | - | - | - | - | - | - | - |
| 連結 Total | 1,461,680 | 1,713,032 | +17.2% | 34,723 | 22,471 | ▲12,251 | 38,141 | 25,167 | ▲12,973 | 13,170 | 1,310 | ▲11,859 | 7,000,710 | - |

営業収益欄の斜体数値は、売上高です。Italic numbers are sales figures.

(※1) (株)ダイエーは2013年8月27日付でイオン(株)の連結子会社になったため、前期実績については記載していません。

As The Dai-ichi, Inc. became Aeon Co., Ltd.'s consolidated subsidiary on Aug. 27th 2013 the figures for the period between Mar. 1st, 2013 and Mar. 31st 2013 are not indicated.

(※2) 総合金融事業においては、イオン連結期間(3月1日から翌年2月末日)に合わせ、イオンフィナンシャルサービス(株)の業績数値を取り込んでおります。従って、同社が公表する業績数値(4月1日から翌年3月末日)とは異なります。

In Financial Services Business, Aeon Co., Ltd. consolidates Aeon Financial Service Co., Ltd.'s financial results from Mar. 1st to the end of Feb. to meet the fiscal year of the Aeon Co., Ltd. Therefore, these figures do not match the numbers of financial statement reported by Aeon Financial Service Co., Ltd. whose fiscal year is from Apr. 1st to the end of Mar.

(※3) [イオンマレーシア連結業績] 営業収益: 29,651百万円、四半期純利益: 1,470百万円 (会計期間: 2014/1/1~2014/3/31)

Operating revenue and net income of consolidated Aeon Co.(M) Bhd. for the period between Jan. 1st, 2014 and Mar. 31st, 2014 were ¥29,651million and ¥1,470million respectively.

| 為替換算レート(Exchange rates) | 通貨 Currency | 2013/5 期中平均 (Average for FY2013,1Q) | 2014/5 期中平均 (Average for FY2014,1Q) |
|----------------------------|------------------|--|--|
| イオンマレーシア(AEON Co.(M) Bhd.) | 1マレーシアリンギット(MYR) | 29.55円(JPY) | 31.36円(JPY) |

〔ご参考〕 要約連結貸借対照表 (Summary of Consolidated Balance Sheets)

◇要約連結貸借対照表 (Summary of Consolidated Balance Sheets)

百万円(Millions of Yen)

| | 2014/2 | 2014/5 |
|---|-----------|-----------|
| 現金及び預金 Cash and time deposits | 653,984 | 616,884 |
| 受取手形及び売掛金 Notes and accounts receivable - trade | 894,882 | 970,662 |
| 有価証券 Marketable securities | 169,628 | 172,467 |
| たな卸資産 Merchandise inventories | 468,499 | 468,083 |
| 営業貸付金 Financial loan | 302,471 | 301,100 |
| 銀行業における貸出金 Loans and bills discounted for banking business | 900,998 | 980,262 |
| その他 Other | 222,313 | 242,399 |
| 流動資産合計 Total current assets | 3,612,778 | 3,751,860 |
| 有形固定資産 Property, buildings and equipment | 2,182,809 | 2,236,861 |
| 無形固定資産 Intangible fixed assets | 230,467 | 237,853 |
| 投資その他の資産 Investments and other assets | 789,186 | 774,134 |
| 固定資産合計 Total fixed assets | 3,202,463 | 3,248,849 |
| 資産合計 Total assets | 6,815,241 | 7,000,710 |
| 支払手形及び買掛金 Notes and accounts payable - trade | 742,967 | 869,869 |
| 銀行業における預金 Deposits for banking business | 1,701,326 | 1,670,952 |
| 有利子負債 Interest-bearing debt | 535,688 | 485,006 |
| その他 Other | 685,264 | 778,795 |
| 流動負債合計 Total current liabilities | 3,665,246 | 3,804,624 |
| 有利子負債 Interest-bearing debt | 1,039,204 | 1,100,574 |
| 長期預り保証金 Lease deposits from lessees | 250,810 | 251,826 |
| その他 Other | 175,411 | 174,372 |
| 固定負債合計 Total long-term liabilities | 1,465,426 | 1,526,773 |
| 負債合計 Total liabilities | 5,130,672 | 5,331,397 |
| 純資産合計 Total net assets | 1,684,569 | 1,669,312 |
| 負債純資産合計 Total net assets and liabilities | 6,815,241 | 7,000,710 |

◇総合金融事業を除く要約貸借対照表 (Summary of Balance Sheets excluding Financial Services Business)

百万円(Millions of Yen)

| | 2014/2 | 2014/5 |
|--|-----------|-----------|
| 現金及び預金 Cash and time deposits | 242,026 | 299,080 |
| 受取手形及び売掛金 Notes and accounts receivable - trade | 57,534 | 64,274 |
| 有価証券 Marketable securities | 46 | 56 |
| たな卸資産 Merchandise inventories | 466,521 | 466,084 |
| その他 Other | 285,258 | 470,646 |
| 流動資産合計 Total current assets | 1,051,387 | 1,300,142 |
| 有形固定資産 Property, buildings and equipment | 2,153,661 | 2,205,826 |
| 無形固定資産 Intangible fixed assets | 170,419 | 170,248 |
| 投資その他の資産 Investments and other assets | 832,092 | 818,370 |
| 固定資産合計 Total fixed assets | 3,156,173 | 3,194,445 |
| 資産合計 Total assets | 4,207,561 | 4,494,588 |
| 支払手形及び買掛金 Notes and accounts payable - trade | 664,697 | 750,936 |
| 有利子負債 Interest-bearing debt | 297,984 | 283,290 |
| その他 Other | 541,502 | 769,559 |
| 流動負債合計 Total current liabilities | 1,504,184 | 1,803,786 |
| 有利子負債 Interest-bearing debt | 684,977 | 699,331 |
| 長期預り保証金 Lease deposits from lessees | 251,233 | 252,275 |
| その他 Other | 167,595 | 166,429 |
| 固定負債合計 Total long-term liabilities | 1,103,806 | 1,118,035 |
| 負債合計 Total liabilities | 2,607,991 | 2,921,821 |
| 純資産合計 Total net assets | 1,599,570 | 1,572,766 |
| 負債純資産合計 Total net assets and liabilities | 4,207,561 | 4,494,588 |

◇総合金融事業の要約貸借対照表 (Summary of Balance Sheets of Financial Services Business)

百万円(Millions of Yen)

| | 2014/2 | 2014/5 |
|---|-----------|-----------|
| 現金及び預金 Cash and time deposits | 414,639 | 322,819 |
| 受取手形及び売掛金 Notes and accounts receivable - trade | 842,977 | 914,002 |
| 有価証券 Marketable securities | 169,582 | 172,410 |
| 営業貸付金 Financial loan | 302,471 | 301,100 |
| 銀行業における貸出金 Loans and bills discounted for banking business | 942,236 | 1,020,862 |
| その他 Other | 64,497 | 53,924 |
| 流動資産合計 Total current assets | 2,736,404 | 2,785,120 |
| 有形固定資産 Property, buildings and equipment | 29,578 | 31,465 |
| 無形固定資産 Intangible fixed assets | 60,118 | 67,676 |
| 投資その他の資産 Investments and other assets | 54,666 | 52,046 |
| 固定資産合計 Total fixed assets | 144,363 | 151,188 |
| 資産合計 Total assets | 2,880,768 | 2,936,308 |
| 支払手形及び買掛金 Notes and accounts payable - trade | 109,211 | 178,437 |
| 銀行業における預金 Deposits for banking business | 1,704,008 | 1,675,968 |
| 有利子負債 Interest-bearing debt | 279,019 | 242,392 |
| その他 Other | 139,047 | 124,529 |
| 流動負債合計 Total current liabilities | 2,231,286 | 2,221,329 |
| 有利子負債 Interest-bearing debt | 354,349 | 401,352 |
| その他 Other | 14,777 | 15,142 |
| 固定負債合計 Total long-term liabilities | 369,126 | 416,494 |
| 負債合計 Total liabilities | 2,600,412 | 2,637,823 |
| 純資産合計 Total net assets | 280,355 | 298,485 |
| 負債純資産合計 Total net assets and liabilities | 2,880,768 | 2,936,308 |

〔ご参考〕 要約連結損益計算書 (Summary of Consolidated Statements of Income)

◇要約連結損益計算書 (Summary of Consolidated Statements of Income)

百万円(Millions of Yen)

| | 2013/5 | 2014/5 |
|---|-----------|-----------|
| 営業収益 Operating revenue | 1,461,680 | 1,713,032 |
| 営業原価 Cost of sales | 953,615 | 1,109,544 |
| 営業総利益 Gross profit | 508,065 | 603,487 |
| 販売費及び一般管理費 Selling, general and administrative expenses | 473,342 | 581,015 |
| 営業利益 Operating income | 34,723 | 22,471 |
| 経常利益 Ordinary income | 38,141 | 25,167 |
| 税金等調整前四半期純利益 Income before income taxes and minority interests | 36,989 | 23,941 |
| 四半期純利益 Net income | 13,170 | 1,310 |

◇総合金融事業を除く要約損益計算書

(Summary of Statements of Income excluding Financial Services Business)

百万円(Millions of Yen)

| | 2013/5 | 2014/5 |
|---|-----------|-----------|
| 営業収益 Operating revenue | 1,410,363 | 1,649,715 |
| 営業原価 Cost of sales | 948,557 | 1,099,582 |
| 営業総利益 Gross profit | 461,804 | 550,132 |
| 販売費及び一般管理費 Selling, general and administrative expenses | 435,933 | 537,334 |
| 営業利益 Operating income | 25,870 | 12,798 |
| 経常利益 Ordinary income | 29,811 | 15,327 |
| 税金等調整前四半期純利益 Income before income taxes and minority interests | 29,722 | 14,009 |
| 四半期純利益 Net income | 11,077 | △603 |

◇総合金融事業の要約損益計算書

(Summary of Statements of Income of Financial Services Business)

百万円(Millions of Yen)

| | 2013/5 | 2014/5 |
|---|--------|--------|
| 営業収益 Operating revenue | 62,926 | 74,283 |
| 営業原価 Cost of sales | 5,801 | 6,147 |
| 営業総利益 Gross profit | 57,124 | 68,135 |
| 販売費及び一般管理費 Selling, general and administrative expenses | 48,634 | 58,404 |
| 営業利益 Operating income | 8,490 | 9,730 |
| 経常利益 Ordinary income | 8,451 | 9,960 |
| 税金等調整前四半期純利益 Income before income taxes and minority interests | 7,589 | 9,931 |
| 四半期純利益 Net income | 2,509 | 1,913 |

イオンリテール株式会社 (AEON Retail Co., Ltd.)

1. 決算概要 (Financial Highlights)

億円 (Hundred Millions of Yen)

| | 2013/5 | 2014/5 | 前年同期増減 YoY Change |
|------------------------------|--------------|--------------|----------------------|
| | 金額 Amount | 金額 Amount | |
| 売上高 Net Sales | 4,781 | 4,862 | 81 |
| その他の営業収入 Other Revenues | 431 | 454 | 22 |
| 営業収益 Operating Revenue | 5,213 | 5,317 | 104 |
| 営業総利益 Gross Profit | 1,697 | 1,733 | 36 |
| 販売管理費合計 SG&A | 1,676 | 1,754 | 78 |
| 営業利益 Operating Income | 20 | ▲ 20 | ▲ 41 |
| 経常利益 Ordinary Income | 38 | ▲ 8 | ▲ 46 |
| 特別利益 Extraordinary Income | 0 | 1 | 1 |
| 特別損失 Extraordinary Loss | 4 | 12 | 8 |
| 四半期純利益 Net Income | 42 | ▲ 13 | ▲ 55 |

億円 (Hundred Millions of Yen)

| | 2013/5 | 2014/5 | 前年同期増減 YoY Change |
|---|--------------|--------------|----------------------|
| | 金額 Amount | 金額 Amount | |
| 総資産 Total Assets | 12,805 | 11,757 | ▲ 1,048 |
| 流動資産 Current Assets | 3,247 | 3,256 | 8 |
| 有形固定資産 Property, Buildings and Equipment | 6,873 | 5,876 | ▲ 997 |
| 無形固定資産 Intangible Fixed Assets | 12 | 10 | ▲ 2 |
| 投資その他の資産 Investment and Other Assets | 2,671 | 2,615 | ▲ 56 |
| 固定資産 Fixed Assets | 9,557 | 8,501 | ▲ 1,056 |
| 流動負債 Current Liabilities | 8,249 | 7,290 | ▲ 958 |
| 固定負債 Long-term Liabilities | 1,130 | 1,070 | ▲ 59 |
| 純資産 Net Assets | 3,426 | 3,396 | ▲ 30 |

2. 経費明細 (Selling, General and Administrative Expenses)

億円 (Hundred Millions of Yen)

| | 2014/5 | | | 2014/5 GMS既存比 Per Comp. GMS Stores |
|--|--------------|---------------------------------|-------------------------|--|
| | 金額 Amount | 営業収益比 % of Operating Revenue | 既存比 Per Comp. Stores | |
| 人件費 Personnel Costs | 679 | 12.8% | +2.4% | +4.3% |
| 販促費 Advertising Costs | 135 | 2.6% | +1.1% | +2.5% |
| 販売費 Selling Costs | 119 | 2.2% | +5.2% | +5.2% |
| 販売促進費 Advertising and Selling Costs | 254 | 4.8% | +2.7% | +3.7% |
| 設備費 Facilities Costs | 667 | 12.6% | +1.8% | +0.3% |
| 一般費 General Costs | 152 | 2.9% | +6.3% | ▲3.5% |
| 合計 Total | 1,754 | 33.0% | +2.4% | +2.3% |

3. 設備投資額 (Capital Expenditures)

億円 (Hundred Millions of Yen)

| | 2013/5 | 2014/5 |
|---|--------|--------|
| 新店投資 (先行投資分含む) New Stores (Incl. Prior Investment) | 81 | 88 |
| 既存店投資 Store Renovation | 165 | 98 |
| 設備投資額計 Total Capital Expenditure | 246 | 186 |

4. 部門別売上高構成比・荒利益率 (Share of Sales and Gross Margin Ratio by Product Category)

億円 (Hundred Millions of Yen)

| | 2014/5 | | | | GMS | | |
|--|--------------|--------------|-------------------------|--------------|-------------------------|--------|---------------------------------|
| | 売上高 Sales | 構成比 Share | 既存比 Per Comp. Stores | 荒利益率 GPM | 売上高 | | 荒利益率増減 GPM Change (Point) |
| | | | | 構成比 Share | 既存比 Per Comp. Stores | | |
| 衣料 Clothing | 941 | 19.6% | ▲2.1% | 36.1% | 19.0% | ▲2.1% | ▲1.3 |
| 食品 Food | 2,651 | 55.0% | ▲0.6% | 23.7% | 56.6% | ▲0.7% | 0.1 |
| 住居余暇 Home, Digital, Sports and H&BC | 1,141 | 23.7% | +3.4% | 26.2% | 24.4% | +3.5% | 0.4 |
| その他 Others | 81 | 1.7% | ▲10.0% | 14.3% | 0.0% | +11.6% | ▲1.6 |
| 直営合計 Total | 4,815 | 100.0% | ▲0.1% | 26.6% | 100.0% | +0.0% | ▲0.1 |

5.GMS既存店売上高・客数・客単価伸び率

(Per Comparable GMS Stores: Sales Growth, Change in Customer Traffic and Average Transaction)

| | 既存比 Per Comparable Stores | | | | | | | FY2013 | FY2014 1Q |
|----------------------------|------------------------------|-------|-------|-------|-------|-------|-------|--------|--------------|
| | 1Q | 2Q | 1H | 3Q | 4Q | 2H | | | |
| 売上高伸び率 Sales Growth | +0.7% | +1.2% | +1.0% | ▲1.3% | ▲0.7% | ▲1.0% | ▲0.0% | +0.0% | |
| 客数 Customer Traffic | +0.1% | ▲0.2% | ▲0.1% | ▲3.3% | ▲3.0% | ▲3.2% | ▲1.6% | ▲3.4% | |
| 客単価 Average Transaction | +0.6% | +1.4% | +1.0% | +2.0% | +2.4% | +2.2% | +1.6% | +3.5% | |

6. 在庫とロス率の状況 (Inventory Position and Loss Ratios)

| | | 2013/5 | 2014/5 | |
|---|--|--|--------|-------|
| 衣料 Clothing | 既存店在庫高伸び率 Inventory Growth Ratio of Comparable Stores | +1.3% | +2.5% | |
| | 在庫回転率(回) Inventory Turnover (times) | 1.1 | 1.0 | |
| | ロス率 Loss Ratio | 23.5% | 30.5% | |
| | 食品 Food | 既存店在庫高伸び率 Inventory Growth Ratio of Comparable Stores | +16.4% | +4.8% |
| 食品 Food | 在庫回転率(回) Inventory Turnover (times) | 10.4 | 10.2 | |
| | ロス率 Loss Ratio | 5.5% | 6.2% | |
| | 住居余暇 Home, Digital, Sports and H&BC | 既存店在庫高伸び率 Inventory Growth Ratio of Comparable Stores | +6.2% | +1.1% |
| 住居余暇 Home, Digital, Sports and H&BC | 在庫回転率(回) Inventory Turnover (times) | 1.2 | 1.3 | |
| | ロス率 Loss Ratio | 12.1% | 12.0% | |
| | 合計 Total | 既存店在庫高伸び率 Inventory Growth Ratio of Comparable Stores | +5.0% | +2.3% |
| | | 在庫回転率(回) Inventory Turnover (times) | 2.4 | 2.4 |
| ロス率 Loss Ratio | | 10.7% | 12.5% | |

※商品在庫高伸び率は、期末在庫(原価ベース)にて算出。

Inventory growth ratio: Calculated by the ending balance of inventories (at cost)

※在庫回転率は、平均在庫(原価ベース)にて算出。

Inventory turnover: Calculated by the average balance of inventories (at cost)

7. GMSカンパニー別売上高構成比 (Sales Share by GMS Regional Companies)

| | 2013/5 | 2014/5 |
|--|--------------|--------------|
| | 構成比 Share | 構成比 Share |
| 東北カンパニー Tohoku Regional Company | 9.4% | 9.5% |
| 北関東・新潟カンパニー Kita Kanto・Niigata Regional Company | 15.0% | 14.9% |
| 南関東カンパニー Minami Kanto Regional Company | 21.8% | 21.9% |
| 東海・長野カンパニー Tokai・Nagano Regional Company | 19.7% | 19.7% |
| 近畿・北陸カンパニー Kinki・Hokuriku Regional Company | 25.9% | 26.0% |
| 中四国カンパニー Chu Shikoku Regional Company | 8.2% | 8.1% |
| 合計 Total | 100.0% | 100.0% |

8. 従業員数 (Number of Employees)

| | 2013/5 | | 2014/5 | |
|---------------------------|--------------|--------------|--------------|--------------|
| | 人数 Number | 構成比 Share | 人数 Number | 構成比 Share |
| 社員 Full-time Employees | 16,282 | 19.8% | 16,508 | 20.0% |
| コミュニティ社員 Part-timers | 66,088 | 80.2% | 66,174 | 80.0% |
| 合計 Total | 82,370 | 100.0% | 82,682 | 100.0% |

※従業員数は期末ベース、コミュニティ社員(有期契約)は月間160時間換算。社員は、他社への出向者を除き、受入出向者を含む勤務者です。
The number of employees is calculated at the term-end. Full-time employees include seconded staff but exclude those loaned to other companies. The number of part-timers is calculated by dividing the total working hours by 160 hours per month.

9. 面積・従業員1人当りの売上高 (Sales per m² and per Employee)

| | 千円 (Thousands of Yen) | |
|--|-----------------------|--------|
| | 2013/5 | 2014/5 |
| 1m ² 当り売上高 (※1) Sales per m ² | 112 | 116 |
| 従業員1人当り売上高 (※2) Sales per Employee | 5,867 | 5,859 |

- (※1) 直営売上高 ÷ 加重平均直営面積
Directly operated sales divided by weighted average sales floor space
(※2) 直営売上高 ÷ 加重平均従業員数
Directly operated sales divided by weighted average number of employees