



2017年2月期

第1四半期決算補足資料（第92期）

Brief Summary

1st Quarter of the Fiscal Year Ending Feb. 28, 2017

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- II. 事業別セグメント情報 (Business Segment Information)
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各連結子会社の開示日時が異なる為、IVとVについては、7月7日以降、下記のウェブサイトにて開示します。

(As the financial result disclosures date and time differs for each consolidated company, for IV and V, the information will be disclosed at the website below on or after July 7.)

URL: <http://www.aeon.info/ir/library/report.html>

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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.

I.連結決算概況 (Consolidated Financial Highlights)

1.決算概要 (Financial Highlights)

百万円(Millions of Yen)

		2012/5	2013/5	2014/5	2015/5	2016/5	前年同期比 YoY
営業収益	Operating Revenue	1,330,517	1,461,680	1,713,032	2,019,417	2,046,142	+1.3%
営業利益	Operating Income	31,625	34,723	22,471	34,913	32,873	-5.8%
経常利益	Ordinary Income	36,433	38,141	25,167	35,784	34,679	-3.1%
税金等調整前四半期純利益	Income before Taxes and Minority Interests	35,978	36,989	23,941	39,628	29,465	-25.6%
親会社株主に帰属する四半期純利益	Profit (Loss) Attributable to Owners of Parent	13,069	13,170	1,310	5,020	-6,254	-
1株当たり当期純利益 (円)	EPS (Yen)	16.99	16.59	1.56	6.01	-7.47	-
期中平均株式数 (千株)	Average number of Shares Outstanding (Share in thousands)	769,381	793,899	838,036	835,551	836,856	+0.2%
総資産	Total Assets	4,268,002	6,232,836	7,000,710	8,203,572	8,410,808	+2.5%
純資産	Net Assets	1,273,557	1,497,138	1,669,312	1,871,801	1,807,446	-3.4%
非支配株主持分	Non-controlling Interests	338,700	431,403	556,255	660,340	680,251	+3.0%
営業活動によるキャッシュフロー	Cash Flow from Operating Activities	162,018	173,418	50,672	-67,914	-24,611	-
減価償却費	Depreciation	35,725	41,372	45,691	52,536	57,020	+8.5%
投資活動によるキャッシュフロー	Cash Flow from Investing Activities	-51,350	-130,520	-83,643	-139,155	-50,160	-
財務活動によるキャッシュフロー	Cash Flow from Financing Activities	7,113	982	-8,714	103,739	24,479	-76.4%

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

百万円(Millions of Yen)

		2012/5	2013/5	2014/5	2015/5	2016/5	前年同期比 YoY
人件費	Personnel Expenses	185,067	202,692	241,931	281,967	295,642	+4.8%
販売促進費	Advertising and Selling Expenses	46,644	51,786	71,749	73,599	74,471	+1.2%
販促費	Advertising Expenses	28,521	33,013	45,012	46,293	47,980	+3.6%
販売費	Selling Expenses	18,123	18,773	26,736	27,305	26,491	-3.0%
設備費	Facilities Expenses	150,511	163,234	201,082	230,398	235,322	+2.1%
一般費	General Expenses	46,418	55,628	66,252	78,621	82,355	+4.7%
合計	Total	428,643	473,342	581,015	664,588	687,792	+3.5%

I. 連結決算概況 (Consolidated Financial Highlights)

3. 金融収支 (Financial Position)

百万円(Millions of Yen)

		2012/5	2013/5	2014/5	2015/5	2016/5	前年同期比 YoY
受取利息	Interest Income	729	942	748	856	577	-32.5%
受取配当金	Dividends Income	245	524	312	257	250	-2.6%
小計 (A)	Financial Income (A)	974	1,466	1,060	1,114	828	-25.6%
支払利息	Interest Expenses	2,001	2,466	2,094	2,790	2,672	-4.2%
社債利息	Interest on Bonds	794	930	846	740	750	+1.3%
コマーシャルペーパー支払利息	Interest on Commercial Paper	7	20	0	25	3	-87.5%
小計 (B)	Financial Expenses (B)	2,803	3,418	2,941	3,555	3,425	-3.7%
金融収支 (A) - (B)	Net Financial Charge (A)-(B)	-1,829	-1,952	-1,880	-2,441	-2,597	-

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

百万円(Millions of Yen)

		2012/5	2013/5	2014/5	2015/5	2016/5	前年同期比 YoY
固定資産売却益	Gain on Sale of Fixed Assets	-	-	-	59	154	
事業分離における移転利益	Profit Shifting due to Business Divestitures	-	-	-	-	469	
段階取得に係る差益	Gain on Accordance with the step Acquisition	-	-	-	7,473	-	
その他特別利益	Other Extraordinary Income	2,535	1,953	2,486	1,819	109	
特別利益合計	Total Extraordinary Income	2,535	1,953	2,486	9,352	733	-92.2%
減損損失	Impairment Loss	1,466	480	1,499	1,908	896	
災害による損失	Loss due to Disaster	-	-	-	-	1,936	
その他特別損失	Provision for Loss on Store Closing	1,523	2,625	2,211	3,599	3,114	
特別損失合計	Total Extraordinary Loss	2,990	3,105	3,711	5,507	5,947	

※当期損益計算書の開示項目に分類しております。過年度のうち該当期間の決算において重要性の観点から非開示としていた項目は、上記分類に係わらず「その他」に含めております。

(The disclosure items are based on the consolidated statements of income for this term. The nondisclosure items of past fiscal year, will be included in "Other Extraordinary Income/Loss" regardless of the above classification.)

I. 連結決算概況 (Consolidated Financial Highlights)

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

百万円(Millions of Yen)

		2013/2	2014/2	2015/2	2016/2	2016/5	前期末比 Change from '16/2
長期借入金 (*1)	Long-term Debt (*1)	936,802	1,012,261	1,143,186	1,255,717	1,223,183	-2.6%
短期借入金	Short-term Debt	262,858	259,064	232,167	328,570	374,125	+13.9%
コマーシャルペーパー	Commercial Paper	48,942	10,000	63,000	115,500	122,970	+6.5%
借入金 計	Debts Subtotal	1,248,604	1,281,325	1,438,353	1,699,787	1,720,279	+1.2%
社債 (*1)	Corporate Bonds (*1)	281,838	246,253	337,427	389,579	398,144	+2.2%
新株予約権付社債 (*1)	Convertible Bonds with Stock Acquisition Rights (*1)	79,958	3,910	90	50	50	+0.0%
社債 計	Bonds Subtotal	361,796	250,163	337,517	389,629	398,194	+2.2%
リース債務 (*1)	Lease Obligations (*1)	23,099	35,153	54,205	66,433	65,756	-1.0%
割賦長期設備未払金 (*1)	Accounts Payable for Capital Expenditures Installment (*1)	5,548	8,249	14,955	14,950	15,402	+3.0%
その他 計	Others Subtotal	28,647	43,402	69,161	81,383	81,158	-0.3%
合計	Total	1,639,048	1,574,892	1,845,032	2,170,800	2,199,632	+1.3%

*1: 1年以内返済・償還予定分を含む。(Repayable within one year.)

参考) 有利子負債残高 ((Ref.) Balance of Interest-bearing Debt)

百万円(Millions of Yen)

		2013/2	2014/2	2015/2	2016/2	2016/5	前期末比 Change from '16/2
連結有利子負債	Consolidated Interest-bearing Debt	1,639,048	1,574,892	1,845,032	2,170,800	2,199,632	+1.3%
総合金融事業除く有利子負債	Excluding Financial Services Business	920,972	941,522	1,125,728	1,374,351	1,420,205	+3.3%
総合金融事業有利子負債	Financial Services Business	718,075	633,369	719,303	796,448	779,427	-2.1%

参考) イオン株式会社発行の社債明細 ((Ref.) Outstanding Corporate Bonds of AEON Co., Ltd.)

百万円(Millions of Yen)

		2016/2 Outstanding	2016/5 Outstanding	発行日 Date of Issue	利率 Coupon	償還期限 Maturity Date
第13回無担保社債	#13 Unsecured Straight Bond	15,000	15,000	2005/6/22	2.590%	2025/6/20
第16回無担保社債	#16 Unsecured Straight Bond	20,000	20,000	2011/11/21	1.010%	2018/11/21
第17回無担保社債	#17 Unsecured Straight Bond	20,000	20,000	2012/8/9	0.720%	2019/8/9
第18回無担保社債	#18 Unsecured Straight Bond	20,000	20,000	2012/8/9	1.150%	2022/8/9
第19回無担保社債	#19 Unsecured Straight Bond	10,000	10,000	2014/6/30	0.462%	2021/6/30
第20回無担保社債	#20 Unsecured Straight Bond	25,000	25,000	2014/6/30	0.820%	2024/6/28
第21回無担保社債	#21 Unsecured Straight Bond	15,000	15,000	2015/7/2	0.472%	2020/7/2
第22回無担保社債	#22 Unsecured Straight Bond	10,000	10,000	2015/7/2	0.749%	2022/7/1
第23回無担保社債	#23 Unsecured Straight Bond	10,000	10,000	2015/7/2	1.073%	2025/7/2
第2回(劣後特約付)無担保社債	#2 Subordinated Bond	26,500	26,500	2006/9/29	(※)	2056/9/29
合計	Total	171,500	171,500			

※ 2016年9月29日まで6ヶ月ユーロ円LIBOR+1.40%、2016年9月29日の翌日以降は6ヶ月ユーロ円LIBOR+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 the following day of Sep. 29, 2016.)

I.連結決算概況 (Consolidated Financial Highlights)

6.設備投資額 (CAPEX)

百万円(Millions of Yen)

		2012/5	2013/5	2014/5	2015/5	2016/5	前年同期差 Inc./dec.
設備投資	CAPEX	64,395	126,876	110,432	152,253	129,100	-23,152
株式投資	Investment in Equity	-	31,078	211	-	-	-

※株式投資：投資先企業の現預金等を差し引いた純投資額。(Investment in Equity: The amount after deducted the cash and cash equivalent of the investment companies.)

7. 主要な連結指標等の推移 (Major Financial Indicators)

		2012/5	2013/5	2014/5	2015/5	2016/5
営業収益営業利益率	Operating Profit Margin	2.4%	2.4%	1.3%	1.7%	1.6%
営業収益経常利益率	Ordinary Profit Margin	2.7%	2.6%	1.5%	1.8%	1.7%
自己資本当期純利益率	Return on Equity (ROE)	1.4%	1.3%	0.1%	0.4%	-0.6%
投下資本利益率	Return on Invested Capital (ROIC)	0.8%	0.8%	0.5%	0.8%	0.7%
総資産経常利益率	Ordinary Income to Total Assets Ratio	0.9%	0.6%	0.4%	0.4%	0.4%
総資産当期純利益率	Net Income to Total Assets Ratio	0.3%	0.2%	0.0%	0.1%	-0.1%
1株当たり純資産(円)	Net Assets per Share (Yen)	1,213.07	1,317.94	1,325.56	1,447.05	1,343.93
自己資本比率	Shareholder's Equity Ratio	21.9%	17.1%	15.9%	14.7%	13.4%
D/Eレシオ (金融除く) (倍)	Debt Equity Ratio (excl. Financial Services Business) (Times)	0.9	1.0	0.8	1.0	1.3
D/Eレシオ (金融含む) (倍)	Debt Equity Ratio (incl. Financial Services Business) (Times)	1.5	1.6	1.4	1.6	2.0

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

億円(Hundred Million of Yen)

		2012/5	2013/5	2014/5	2015/5	2016/5	前年同期比 YoY
トップバリュ売上 グループ計	Total TOPVALU Sales of Aeon Group	1,524	1,739	1,938	1,911	1,820	-4.8%

Ⅱ.事業別セグメント情報 (Business Segment Information)

8. セグメント別収益状況と設備投資 (Operating Revenue, Operating Income and CAPEX by Business Segment)

百万円(Millions of Yen)

		営業収益 Operating Revenue			営業利益 Operating Income			設備投資 CAPEX		
		2015/5	2016/5	前年同期比 YoY	2015/5	2016/5	前年同期比 YoY	2015/5	2016/5	前年同期差 Inc./dec.
GMS事業	General Merchandise Store Business	662,811	745,159	+12.4%	-4,790	-9,322	-	11,776	18,707	+6,930
SM・DS事業	Supermarket & Discount Store Business	767,692	716,352	-6.7%	2,965	5,500	+85.5%	41,388	18,126	-23,262
小型店事業	Small-sized Store Business	84,331	92,779	+10.0%	221	-35	-	5,212	5,640	+427
ドラッグ・ファーマシー事業	Drugstore & Pharmacy Business	143,680	153,857	+7.1%	3,384	3,944	+16.5%	4,117	4,430	+312
総合金融事業	Financial Services Business	84,618	89,635	+5.9%	12,455	13,696	+10.0%	7,961	12,444	+4,483
ディベロッパー事業	Shopping Center Development Business	66,350	78,116	+17.7%	11,340	11,636	+2.6%	57,157	47,927	-9,229
サービス・専門店事業	Service & Specialty Store Business	186,516	196,954	+5.6%	7,776	7,802	+0.3%	6,961	7,010	+48
国際事業	International Business	117,438	111,329	-5.2%	744	-1,348	-	14,634	11,239	-3,394
その他事業	Others Business	2,725	3,035	+11.4%	-909	-1,006	-	77	424	+347
調整額	Adjustments	-96,747	-141,077	-	1,724	2,005	+16.3%	2,966	3,150	+184
連結合計	Consolidated Total	2,019,417	2,046,142	+1.3%	34,913	32,873	-5.8%	152,253	129,100	-23,152

Ⅲ. 地域別の状況 (Segment Information by Region)

9. 地域別実績 (Information by Region)

1) 地域別収益状況 (Segment Information by Region)

百万円(Millions of Yen)

			2012/5	2013/5	2014/5	2015/5	2016/5	前年同期比 YoY	
日本	Japan	営業収益	Operating Revenue	1,251,473	1,347,096	1,574,491	1,840,483	1,868,071	+1.5%
		営業利益	Operating Income	27,302	30,824	19,394	30,226	31,384	+3.8%
アセアン	ASEAN	営業収益	Operating Revenue	33,720	60,345	71,027	91,901	82,371	-10.4%
		営業利益	Operating Income	3,506	5,559	5,157	6,644	4,546	-31.6%
中国	China	営業収益	Operating Revenue	33,390	39,181	49,692	62,734	67,781	+8.0%
		営業利益	Operating Income	941	-1,496	-1,764	-2,361	-3,006	-
その他	Others	営業収益	Operating Revenue	11,932	15,056	17,821	24,297	27,918	+14.9%
		営業利益	Operating Income	-124	-164	-316	404	-50	-
合計	Total	営業収益	Operating Revenue	1,330,517	1,461,680	1,713,032	2,019,417	2,046,142	+1.3%
		営業利益	Operating Income	31,625	34,723	22,471	34,913	32,873	-5.8%

参考) 国内外比率 ((Ref.) Ratio of Japan & Overseas)

			2012/5	2013/5	2014/5	2015/5	2016/5	前年同期差 Inc./dec.	
営業収益	Operating Revenue	国内	Japan	94.1%	92.2%	91.9%	91.1%	91.3%	+0.2 pts.
		海外	Overseas	5.9%	7.8%	8.1%	8.9%	8.7%	-0.2 pts.
営業利益	Operating Income	国内	Japan	86.3%	88.8%	86.3%	86.6%	95.5%	+8.9 pts.
		海外	Overseas	13.7%	11.2%	13.7%	13.4%	4.5%	-8.9 pts.

2) 地域別設備投資実績 (CAPEX by Region)

百万円(Millions of Yen)

			2012/5	2013/5	2014/5	2015/5	2016/5	前年同期差 Inc./dec.
日本	Japan	/		117,296	88,003	120,941	100,772	-20,169
アセアン	ASEAN			6,198	14,518	19,944	12,339	-7,604
中国	China			2,799	6,364	9,815	14,127	+4,312
その他	Others			581	1,545	1,551	1,862	+310
合計	Total			126,876	110,432	152,253	129,100	-23,152

参考) 国内外比率 ((Ref.) Ratio of Japan & Overseas)

			2012/5	2013/5	2014/5	2015/5	2016/5	前年同期差 Inc./dec.
国内	Japan	/		92.5%	79.7%	79.4%	78.1%	-1.4 pts.
海外	Overseas			7.5%	20.3%	20.6%	21.9%	+1.4 pts.

※設備投資は固定資産取得による支出及び差入保証金の支出合計となります。(Capital expenditure will be summed up by the expenses of buying fixed asset and the expenses of fixed leasehold deposits to lessors.)