

2012年2月期 決算補足資料(連結)

**Explanatory Information**

**for the fiscal year 2012**

株式会社スリーエフ

**Three F Co.,Ltd.**

1. 業績概要〔連結〕  
Financial Summary〔Consolidated〕

(百万円/Millions of yen)

	2010/2	対前年同期 増減率	2011/2	対前年同期 増減率	2012/2	対前年同期 増減率	2013/2予想	対前年同期 増減率
	Fiscal year ended	% of change from the same period of previous year	Fiscal year ended	% of change from the same period of previous year	Fiscal year ended	% of change from the same period of previous year	Fiscal year ended (Forecast)	% of change from the same period of previous year
チェーン全店売上高 Sales at all stores in chain	106,281	△ 5.5%	103,414	△ 2.7%	106,355	2.8%	107,000	0.6%
営業総収入 Gross operating receipts	26,461	△ 8.4%	26,991	2.0%	26,908	△ 0.3%	26,950	0.2%
営業利益 Operating income	253	△ 72.8%	566	123.8%	767	35.5%	800	4.2%
経常利益 Ordinary income	356	△ 64.7%	669	88.1%	840	25.6%	850	1.1%
当期純利益 Net income	△ 283	—	337	—	△ 201	—	220	—
1株当たり利益 Earnings per share	△ 37.35円		44.55円		△ 26.61円		29.04円	
1株当たり配当金 Dividend per share	12.00円		13.00円		13.00円		13.00円	
純資産 Total net assets	5,843		6,087		5,795		—	
総資産 Total assets	18,003		16,554		17,202		—	
自己資本比率 Equity ratio	31.7%		35.9%		32.8%		—	
1株当たり純資産 Book value per share	752.20円		784.13円		745.36円		—	

連結貸借対照表主要項目 Summary of interim consolidated balance sheets

(百万円/Millions of yen)

	2011/2		2012/2		増減率 % of change from the same period of previous year	増減要因
	Fiscal year ended	構成比 Proportion	Fiscal year ended	構成比 Proportion		
資産合計 Total assets	16,554	100.0%	17,202	100.0%	3.9%	
流動資産 Current assets	4,232	25.6%	4,856	28.2%	14.8%	
現金預金 Cash and deposits	1,062	6.4%	1,903	11.1%	79.1%	
加盟店貸勘定 Franchised stores credit accounts	1,029	6.2%	1,017	5.9%	△1.1%	
商品 Merchandise	378	2.3%	336	2.0%	△11.2%	
未収入金 Accounts receivable	753	4.6%	806	4.7%	7.0%	
固定資産 Fixed assets	12,322	74.4%	12,346	71.8%	0.2%	
有形固定資産 Tangible fixed assets	4,001	24.2%	4,077	23.7%	1.9%	
建物及び構築物 Buildings and structures	2,359	14.3%	2,293	13.3%	△2.8%	
リース資産 Lease assets	761	4.6%	905	5.3%	18.9%	リース資産 2012/2 取得344百万円 償却△198百万円 除却△1百万円
無形固定資産 Intangible fixed assets	1,126	6.8%	824	4.8%	△26.8%	
ソフトウェア Software	1,049	6.3%	756	4.4%	△27.9%	ソフトウェア 2012/2 取得158百万円 償却△451百万円
投資その他の資産 Investments and other assets	7,194	43.5%	7,444	43.3%	3.5%	
敷金及び保証金 Lease and guarantee deposits	6,929	41.9%	6,948	40.4%	0.3%	
負債合計 Total liabilities	10,466	63.2%	11,407	66.3%	9.0%	
流動負債 Current liabilities	9,044	54.6%	8,926	51.9%	△1.3%	
買掛金 Trade payable	565	3.4%	494	2.9%	△12.6%	直営店 70店 → 67店
加盟店買掛金 Accounts payable of franchised stores	4,048	24.5%	4,103	23.9%	1.4%	
短期借入金 Loans payable	199	1.2%	-	-	△100.0%	
一年以内返済予定長期借入金 Current portion long-term payable	210	1.3%	-	-	△100.0%	
リース債務 Lease obligations	162	1.0%	233	1.4%	44.0%	
未払金 Accounts payable-other	865	5.2%	852	5.0%	△1.5%	
預り金 Deposits received	2,308	13.9%	2,478	14.4%	7.4%	収納代行預り金 2,272百万円 → 2,438百万円
固定負債 Fixed liabilities	1,422	8.6%	2,481	14.4%	74.5%	
リース債務 Lease obligations	611	3.7%	740	4.3%	21.0%	
資産除去債務 Asset retirement obligations	-	-	933	5.4%	-	資産除去債務会計基準の 適用開始による期首増加額 910百万円
長期預り保証金 Long-term guarantee deposited	778	4.5%	780	4.5%	0.3%	
純資産合計 Total net assets	6,087	35.4%	5,795	33.7%	△4.8%	
株主資本 Shareholder's equity	5,936	34.5%	5,636	32.8%	△5.1%	
その他包括利益累計額 Other comprehensive income	3	0.0%	10	0.1%	172.2%	
少数株主持分 Minority interests	148	0.9%	149	0.9%	0.8%	

連結損益計算書主要項目 Summary of interim consolidated statements of income

(百万円/Millions of yen)

	2011/2		2012/2		増減率 % of change from the same period of previous year	増減要因
	Fiscal year ended	売上比 Ratio to gross operating receipts	Fiscal year ended	売上比 Ratio to gross operating receipts		
営業総収入 Gross operating receipts	26,991	100.0%	26,908	100.0%	△0.3%	
営業収入 Operating revenues	14,740	54.6%	15,546	57.8%	5.5%	
加盟店からの収入 Income from franchised stores	11,676	43.3%	11,745	43.7%	0.6%	期中平均加盟店 559店 → 567店
その他の営業収入 Other operating revenue	3,064	11.4%	3,801	14.1%	24.0%	
売上高 Sales	12,250	45.4% (100.0%)	11,361	42.2% (100.0%)	△7.3%	期中平均直営店 79店 → 71店
売上原価 Cost of sales	9,010	(73.5%)	8,404	(74.0%)	△6.7%	
営業総利益 Total operating profit	17,981	66.6%	18,504	68.8%	2.9%	
販売費及び一般管理費 Selling, general and administrative expenses	17,414	64.5%	17,736	65.9%	1.8%	
従業員給料及び賞与 Employees' salaries and bonuses	2,557		2,492			従業員数 469人 → 453人
賃借料 Rental cost	4,599		4,679			期中平均直営店及びCタイプ店 494店 → 497店
運送費及び保管費 Transportation and warehousing expenses	2,396		3,074			物流共配事業経費 (2010/6~)
営業利益 Operating income	566	2.1%	767	2.9%	35.5%	
営業外収益 Non-operating income	135	0.5%	111	0.4%	△17.9%	
受取利息 Interest received	84		83		△1.2%	
営業外費用 Non-operating expenses	32	0.1%	37	0.1%	18.1%	
支払利息 Interest expenses	27		22			
経常利益 Ordinary income	669	2.5%	840	3.1%	25.6%	
特別利益 Special gains	334	1.2%	18	0.1%	△94.4%	(主要特別利益 内訳) 2011/2 2012/2 受取補償金 204百万円 —
特別損失 Special losses	352	1.3%	1,054	3.9%	199.2%	賃貸借契約 解約損修正益 120百万円 14百万円
固定資産除却損 Loss from disposal of fixed assets	119		56			
投資有価証券評価損 Loss on valuation of investment securities	-		50			
賃貸借契約解約損 Loss on cancellation of leasehold contracts	55		36			
減損損失 Loss of impairment assets	168		203			
資産除去債務会計基準 の適用に伴う影響額 Loss on adjustment for changes of accounting standard for asset retirement obligations	-		688			(主要特別損失 内訳) 2011/2 2012/2 閉店 28店 12店 226百万円 98百万円
法人税、住民税及び事業税 Corporation, inhabitants and enterprise taxes	86	0.3%	282	1.0%	224.4%	
法人税等調整額 Income taxes-deferred	224	0.8%	△277	△1.0%	—	
少数株主利益 Minority interests in net income	3	0.0%	2	0.0%	△28.1%	
当期純利益 Net income	337	1.3%	△201	△0.7%	—	
1株当たり純利益 Earnings per share		44.55円		△26.61円		

## 2. 店舗の状況 Store Count

### (1) 運営形態別店舗内訳 Store count by style of operation

(単位：店)

	2010/2 Fiscal year ended	2011/2 Fiscal year ended	2012/2 Fiscal year ended	2013/2予想 Fiscal year ended (Forecast)
Aタイプ Franchised stores whose premises are owned by franchisees	148	136	132	132
Cタイプ Franchised stores whose premises are owned by Three F	412	428 (3)	440 (11)	460 (15)
加盟店 Franchised stores	560	564 (3)	572 (11)	592 (15)
直営店 Directly-owned stores	86 (19)	70 (17)	67 (9)	63 (5)
合計 Total	646 (19)	634 (20)	639 (20)	655 (20)

※ ( ) 内の数字はFF・FDバランス型店舗の店舗数であります。

(2) 地域別店舗内訳 Store count by region

(単位：店)

	2010/2 Fiscal year ended	2011/2 Fiscal year ended	2012/2 Fiscal year ended
神奈川県 Kanagawa	298 (15)	292 (14)	295 (14)
東京都 Tokyo	182 (4)	178 (6)	179 (6)
千葉県 Chiba	106	105	106
埼玉県 Saitama	60	59	59
合計 Total	646 (19)	634 (20)	639 (20)

※ ( ) 内の数字はFF・FDバランス型店舗の店舗数であります。

(3) 免許品取扱い店舗数、24時間営業店舗数 Number of stores selling alcohol, tobacco and open 24 hours

(単位：店)

	2010/2	構成比	2011/2	構成比	2012/2	構成比
	Fiscal year ended	Proportion	Fiscal year ended	Proportion	Fiscal year ended	Proportion
酒有り店 Stores selling alcohol	637 (19)	98.6%	625 (20)	98.6%	627 (20)	98.1%
たばこ有り店 Stores selling tobacco	523 (10)	81.0%	539 (11)	85.0%	551 (12)	86.2%
24時間営業店 Stores open 24 hours	619 (17)	95.8%	611 (18)	96.4%	617 (18)	96.6%

※ ( ) 内の数字はFF・FDバランス型店舗の店舗数であります。

### 3. 営業の状況 Business Performance

#### (1) 商品別売上高 Sales by product category

(百万円/Millions of yen)

	2010/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2011/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2012/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2013/2予想 Fiscal year ended (Forecast)	対前年同期増減率 % of change from the same period of previous year
加工食品 Processed foods	33,873	△ 6.8%	32,136	△ 5.1%	30,933	△ 3.7%	31,500	1.8%
ファストフード Fast foods	24,151	△ 11.3%	23,842	△ 1.3%	24,150	1.3%	24,600	1.9%
デイリー食品 Fresh foods	9,709	△ 5.7%	9,395	△ 3.2%	8,683	△ 7.6%	9,200	6.0%
非食品 Non-consumables	26,918	2.2%	27,347	1.6%	32,225	17.8%	31,500	△ 2.3%
本・サービス Books and services	11,629	△ 4.8%	10,692	△ 8.1%	10,362	△ 3.1%	10,200	△ 1.6%
合計 Total	106,281	△ 5.5%	103,414	△ 2.7%	106,355	2.8%	107,000	0.6%

#### (2) 地域別売上高 Sales by region

(百万円/Millions of yen)

	2010/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2011/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2012/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year
神奈川県 Kanagawa	51,106	△ 5.8%	49,106	△ 3.9%	50,151	2.1%
東京都 Tokyo	28,273	△ 8.9%	28,469	0.7%	29,070	2.1%
千葉県 Chiba	17,718	△ 0.2%	16,698	△ 5.8%	17,523	4.9%
埼玉県 Saitama	9,182	△ 2.0%	9,140	△ 0.5%	9,610	5.1%
合計 Total	106,281	△ 5.5%	103,414	△ 2.7%	106,355	2.8%

#### (3) 平均日販 Average daily sales

(千円/Thousands of yen)

	2010/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2011/2 Fiscal year ended	対前年同期増減率 (伸長率) % of change from the same period of previous year	2012/2 Fiscal year ended	対前年同期増減率 (伸長率) % of change from the same period of previous year	2013/2予想 Fiscal year ended (Forecast)	対前年同期増減率 (伸長率) % of change from the same period of previous year
既存店 平均日販 Average daily sales at existing-stores	447	(△ 5.7%)	443	(△ 2.1%)	455	(1.9%)	454	(△ 1.0%)
全店 平均日販 Average daily sales at all stores in chain	445	△ 4.7%	441	△ 0.8%	454	2.9%	453	△ 0.2%

※ FF・FDバランス型店舗の数値は含んでおりません。

(4) 客数及び客単価 Number of customers per day and Sales per customer

	2010/2	対前年同期 増減率	2011/2	対前年同期 増減率 (伸長率)	2012/2	対前年同期 増減率 (伸長率)
	Fiscal year ended	% of change from the same period of previous year	Fiscal year ended	% of change from the same period of previous year	Fiscal year ended	% of change from the same period of previous year
既存店 平均客数 (人) Number of customers per day at existing-stores	835	(△ 2.9%)	822	(△ 2.4%)	809	(△ 2.2%)
全 店 平均客数 (人) Number of customers per day at all stores in chain	829	△ 2.2%	818	△ 1.3%	808	△ 1.3%
既存店 平均客単価 Sales per customer at existing-stores	¥536	(△ 2.7%)	¥539	(0.4%)	¥562	(4.1%)
全 店 平均客単価 Sales per customer at all stores in chain	¥536	△ 2.6%	¥539	0.6%	¥562	4.2%

※ FF・FDバランス型店舗の数値は含んでおりません。

(5) 平均在庫 Average inventory at year-end

(千円/Thousands of yen)

	2010/2	対前年同期 増減率	2011/2	対前年同期 増減率	2012/2	対前年同期 増減率
	Fiscal year ended	% of change from the same	Fiscal year ended	% of change from the same	Fiscal year ended	% of change from the same
1店舗当たり期末平均在庫 Average inventory	5,455	△ 6.3%	6,128	12.3%	5,885	△ 4.0%
B o o k 併 設 店 at stores with book store attached	19,672	△ 7.5%	19,799	0.6%	16,990	△ 14.2%
そ の 他 at other stores	5,109	△ 6.2%	5,763	12.8%	5,590	△ 3.0%

※ FF・FDバランス型店舗の数値は含んでおりません。

(6) 加盟店貸借勘定 Financial position of franchised stores at year-end

(千円/Thousands of yen)

	2010/2 Fiscal year ended	2011/2 Fiscal year ended	2012/2 Fiscal year ended
1店舗当たり加盟店貸勘定 Average franchised stores credit accounts	2,221	2,100	2,051
B o o k 併 設 店 at stores with book store attached	7,731	5,236	4,733
そ の 他 at other stores	2,101	2,034	2,000
1店舗当たり加盟店借勘定 Average franchised stores debit accounts	31	266	392
B o o k 併 設 店 at stores with book store attached	—	852	683
そ の 他 at other stores	32	250	380

※ FF・FDバランス型店舗の数値は含んでおりません。

(7) 売上総利益率の状況 Ratio of gross profit to net sales at all stores in chain

	2010/2 Fiscal year ended	2011/2 Fiscal year ended	2012/2 Fiscal year ended	2013/2予想 Fiscal year ended (Forecast)
加 工 食 品 Processed foods	33.7%	34.5%	34.8%	34.8%
フ ァ ス ト フ ード Fast foods	32.8%	33.1%	32.5%	33.3%
デ イ リ ー 食 品 Fresh foods	33.7%	33.7%	34.2%	34.3%
非 食 品 Non-consumables	14.8%	14.6%	14.1%	14.2%
本 ・ サ ー ビ ス Books and services	24.5%	24.1%	23.2%	23.5%
合 計 Total	27.9%	28.1%	27.1%	27.5%

※ FF・FDバランス型店舗の数値は含んでおりません。

#### 4. 設備投資の状況 Capital expenditure

(百万円/Millions of yen)

	2010/2 Fiscal year ended	2011/2 Fiscal year ended	2012/2 Fiscal year ended	2013/2予想 Fiscal year ended (Forecast)
店 舗 投 資 Stores	1,250	792	929	1,771
本 部 関 連 投 資 Head office facilities	433	180	215	419
合 計 Total	1,683	972	1,145	2,190

#### 5. 減価償却費の状況 Depreciation

(百万円/Millions of yen)

	2010/2 Fiscal year ended	2011/2 Fiscal year ended	2012/2 Fiscal year ended	2013/2予想 Fiscal year ended (Forecast)
店 舗 投 資 Stores	535	543	593	682
本 部 関 連 投 資 Head office facilities	518	438	451	518
合 計 Total	1,054	981	1,045	1,200