2007年2月期　中間決算補足資料（連結）

Explanatory Information

for the first half of the fiscal year 2007

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）

	2005/8 Six months ended	対前年同期増減率 % of change from the same period of previous year	2006/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2006/8 Six months ended	対前年同期増減率 % of change from the same period of previous year	2007/2予想 Fiscal year ended (Forecast)	対前年同期増減率 % of change from the same period of previous year
チェーン全店売上高 Sales at all stores in chain	56,058	△ 1.1%	108,424	△ 1.5%	55,287	△ 1.4%	110,000	1.5%
営業総収入 Gross operating receipts	13,981	△ 8.9%	27,345	△ 4.9%	15,421	10.3%	30,600	11.9%
営業利益 Operating income	914	△ 30.5%	820	△ 52.7%	699	△ 23.5%	970	18.3%
経常利益 Ordinary income	928	△ 32.9%	853	△ 53.2%	728	△ 21.5%	1,000	17.1%
中間（当期）純利益 Interim／Net income	434	△ 10.5%	407	△ 43.4%	54	△ 87.5%	100	△ 75.5%
1株当たり利益 Earnings per share	56.52円		51.90円		7.09円		13.00円	
純資産 Total net assets	6,380		6,283		6,244		—	
総資産 Total assets	19,486		17,901		20,996		—	
自己資本比率 Equity ratio	32.1%		34.1%		29.1%		—	
1株当たり純資産 Book value per share	829.38円		816.78円		811.83円		—	

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

（百万円／Millions of yen）

	2005/8	構成比 Proportion	2006/8	構成比 Proportion	増減率 % of change from the same period of previous year	増減要因
資産合計 Total assets	19,486	100.0%	20,996	100.0%	7.8%	
流動資産 Current assets	6,312	32.4%	7,467	35.6%	18.3%	
現金預金 Cash and deposits	4,013	20.6%	4,880	23.2%	21.6%	
加盟店貸勘定 Franchised stores credit accounts	535	2.7%	563	2.7%	5.3%	
棚卸資産 Inventories	355	1.8%	494	2.4%	39.3%	直営店　８９店 → １２０店
未収入金 Accounts receivable	214	1.1%	241	1.1%	12.6%	
固定資産 Fixed assets	13,173	67.6%	13,529	64.4%	2.7%	
有形固定資産 Tangeble fixed assets	4,742	24.3%	4,683	22.3%	△1.2%	
自社有形固定資産 Company-held tangeble fixed assets	1,606	8.2%	1,803	8.6%	12.2%	
建物及び構築物 Buildings and sutructures	847	4.3%	1,254	6.0%	48.1%	
貸与有形固定資産 Loaned tangeble fixed assets	3,135	16.1%	2,880	13.7%	△8.1%	
建物及び構築物 Buildings and sutructures	2,560	13.1%	2,306	11.0%	△9.9%	
無形固定資産 Intangeble fixed assets	1,102	5.7%	1,328	6.3%	20.5%	
ソフトウェア Software	1,033	5.3%	1,262	6.0%	22.2%	2006/8 取得　747百万円　償却　518百万円
投資その他の資産 Investments and other assets	7,328	37.6%	7,516	35.8%	2.6%	
敷金・保証金 Fixed leasehold deposits	7,024	36.0%	7,206	34.3%	2.6%	
負債合計 Total liabilities	13,106	67.3%	14,751	70.3%	12.6%	
流動負債 Current liabilities	10,637	54.6%	11,550	55.0%	8.6%	
買掛金 Trade payable	896	5.0%	1,220	5.8%	36.2%	直営店　８９店 → １２０店
加盟店買掛金 Accounts payable of franchised stores	5,229	26.8%	5,071	24.2%	△3.0%	加盟店　５４７店 → ５３３店
未払金 Accounts payable-other	977	5.0%	1,116	5.3%	14.2%	
預り金 Deposits received	2,232	11.5%	2,462	11.7%	10.3%	収納代行預り金　2,168百万円 → 2,398百万円 取扱件数　5,025千件 → 5,446千件
固定負債 Fixed liabilities	2,468	12.7%	3,201	15.3%	29.7%	
社債 Bonds	1,000	5.1%	—	—	—	
長期借入金 Long-term debt	637	3.3%	2,351	11.2%	269.1%	
預り保証金 Guaranty deposits received	732	3.8%	750	3.6%	2.4%	
純資産合計 Total net assets	6,380	32.7%	6,244	29.7%	△2.1%	
株主資本 Shareholders' equity	6,236	32.0%	6,086	29.0%	△2.4%	
評価・換算差額等 Total valuation and translationn adjustment	21	0.1%	27	0.1%	30.3%	
少数株主持分 Minority interests	122	0.6%	131	0.6%	7.2%	
有利子負債 Interest bearing debts	1,958	10.0%	3,193	15.2%	63.1%	

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

（百万円／Millions of yen）

	2005/8	売上比 Ratio to gross operating receipts	2006/8	売上比 Ratio to gross operating receipts	増減率 % of change from the same period of previous year	増減要因
営業総収入 Gross operating receipts	13,981	100.0%	15,421	100.0%	10.3%	
営業収入 Operating revenues	7,221	51.6%	6,779	44.0%	△6.1%	
加盟店からの収入 Income from franchised stores	6,776	48.5%	6,412	41.6%	△5.4%	期中平均加盟店　５４４店 → ５３３店
その他の営業収入 Other operating revenue	444	3.2%	366	2.4%	△17.6%	
売上高 Sales	6,760	48.4% (100.0%)	8,642	56.0% (100.0%)	27.8%	期中平均直営店　９１店 → １１９店
売上原価 Cost of sales	4,996	(73.9%)	6,485	(75.0%)	29.8%	
営業総利益 Total operating profit	8,984	64.3%	8,935	57.9%	△0.5%	
販売費及び一般管理費 Selling, general and administrative expenses	8,070	57.8%	8,236	53.4%	2.1%	
従業員給与・賞与 Employees' salaries and bonuses	1,056		1,094			従業員数　４６０人 → ４８８人
賃借料 Rental cost	1,913		2,070			期中平均直営店及びCタイプ店 ４３２店 → ４６２店
リース料 Lease expenses	1,229		902			期中平均店舗数 ６３４店 → ６５３店
営業利益 Operating income	914	6.5%	699	4.5%	△23.5%	
営業外収益 Non-operating income	31	0.2%	51	0.3%	62.8%	
受取利息 Interest received	19		23		15.8%	
営業外費用 Non-operating expenses	17	0.1%	22	0.1%	28.2%	
支払利息 Interest expenses	14		17			
経常利益 Ordinary income	928	6.6%	728	4.7%	△21.5%	
特別利益 Special gains	5	0.0%	72	0.5%	1179.2%	
特別損失 Special losses	130	0.9%	632	4.1%	383.7%	（主要特別損失 内訳）
固定資産除却損 Loss from disposal of fixed assets	77		155			２００５/８　２００６/８
リース解約損 Loss on lease cancellations	39		75			閉店　９店　２１店 １２４百万円　３４１百万円
賃貸借契約解約損 Loss on lease cancellations	11		111			ﾘﾆｭｰｱﾙ　７店　５店 ４百万円　２百万円
減損損失 Loss of impairmennt assets	—		289			減損損失　—　２８９百万円
法人税、住民税及び事業税 Corporation, inhabitants and enterprise taxes	384	2.7%	225	1.5%	△41.4%	
法人税等調整額 Income taxes-deferred	△ 20	△0.1%	△115	△0.7%	453.7%	
少数株主利益 Minority interests in net income	4	0.0%	3	0.0%	△23.4%	
当期純利益 Net income	434	3.1%	54	0.4%	△87.5%	
１株当たり純利益 Earnings per share		56.52円		7.09円		

1．業績概要
Financial Summary 〔non-consolidated〕

（百万円／Millions of yen）

	2005/8 Six months ended	対前年同期増減率 % of change from the same period of previous year	2006/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2006/8 Six months ended	対前年同期増減率 % of change from the same period of previous year	2007/2予想 Fiscal year ended (Forecast)	対前年同期増減率 % of change from the same period of previous year
チェーン全店売上高 Sales at all stores in chain	56,058	△ 1.1%	108,424	△ 1.5%	55,287	△ 1.4%	110,000	1.5%
営業総収入 Gross operating receipts	13,964	△ 8.9%	27,306	△ 4.9%	15,410	10.4%	30,550	11.9%
営業利益 Operating income	895	△ 31.3%	775	△ 54.1%	685	△ 23.5%	940	21.1%
経常利益 Ordinary income	910	△ 33.6%	811	△ 54.4%	716	△ 21.4%	970	19.6%
中間（当期）純利益 Interim／Net income	430	△ 10.9%	395	△ 44.1%	51	△ 88.1%	95	△ 76.0%
1株当たり利益 Earnings per share	55.92円		50.31円		6.68円		12.35円	
1株当たり配当金 Dividend per share	11.00円		11.00円		11.00円		11.00円	
	22.00円				22.00円			
純資産 Total net assets	6,217		6,106		6,063		—	
総資産 Total assets	19,306		17,709		20,803		—	
自己資本比率 Equity ratio	32.2%		34.5%		29.1%		—	
1株当たり純資産 Book value per share	808.30円		793.88円		788.19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）

	2005/8	2006/2	2006/8	2007/2予想 (Forecast)
Ａタイプ Franchised stores whose premises are owned by franchisees	203	195	188	188
Ｃタイプ Franchised stores whose premises are owned by Three F	347	343	345	384
加盟店 Franchised stores	550	538	533	572
直営店（社員） Stores managed by employees of Three F	76 (9)	97 (27)	103 (28)	107 (29)
FC移行中委託店 Stores converting into franchised stores	10	14	17	―
直営店 Directly-owned stores	86 (9)	111 (27)	120 (28)	107 (29)
合計 Total	636 (9)	649 (27)	653 (28)	679 (29)

※　（　　）内の数字はＦＤ商品販売強化店の店舗数であります。

（２）地域別店舗内訳　Store count by region

（単位：店）

	2005/8	2006/2	2006/8
神奈川県 Kanagawa	283 (8)	295 (21)	297 (22)
東京都 Tokyo	177 (1)	181 (6)	186 (6)
千葉県 Chiba	120	116	112
埼玉県 Saitama	56	57	58
合計 Total	636 (9)	649 (27)	653 (28)

※　（　　）内の数字はＦＤ商品販売強化店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, tabacco and open 24 hours

（単位：店）

	2005/8	構成比 Proportion	2006/2	構成比 Proportion	2006/8	構成比 Proportion
酒有り店 Stores selling alcohol	561 (7)	88.2%	565 (18)	87.1%	564 (16)	86.4%
たばこ有り店 Stores selling tabacco	452 (1)	71.1%	456 (11)	70.3%	459 (7)	70.3%
24時間営業店 Stores open 24 hours	608 (8)	95.6%	623 (26)	96.0%	625 (24)	95.7%

※　（　　）内の数字はＦＤ商品販売強化店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）

	2005/8 Six months ended	対前年同期増減率 % of change from the same period of previous year	2006/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2006/8 Six months ended	対前年同期増減率 % of change from the same period of previous year	2007/2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	18,868	△ 3.8%	36,282	△2.9%	18,879	0.1%	37,560	3.5%
ファストフード Fast foods	14,724	0.3%	28,618	0.1%	14,485	△ 1.6%	28,820	0.7%
デイリー食品 Fresh foods	4,995	1.3%	9,743	1.7%	5,380	7.7%	10,310	5.8%
非食品 Non-consumables	10,552	1.5%	20,521	0.4%	10,644	0.9%	21,180	3.2%
本・サービス Books and services	6,916	△ 2.0%	13,259	△6.2%	5,897	△ 14.7%	12,130	△ 8.5%
合計 Total	56,058	△ 1.1%	108,424	△1.5%	55,287	△ 1.4%	110,000	1.5%

（２）地域別売上高　Sales by region

（百万円／Millions of yen）

	2005/8 Six months ended	対前年同期増減率 % of change from the same period of previous year	2006/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2006/8 Six months ended	対前年同期増減率 % of change from the same period of previous year
神奈川県 Kanagawa	26,399	△ 2.1%	51,329	△ 1.8%	26,632	0.9%
東京都 Tokyo	15,135	△ 1.4%	29,345	△ 1.6%	15,034	△ 0.7%
千葉県 Chiba	9,890	△ 0.6%	18,891	△ 2.6%	9,137	△ 7.6%
埼玉県 Saitama	4,633	5.1%	8,859	2.5%	4,482	△ 3.2%
合計 Total	56,058	△ 1.1%	108,424	△ 1.5%	55,287	△ 1.4%

（３）平均日販　Average daily sales

（千円／Thousands of yen）

	2005/8 Six months ended	対前年同期増減率（伸長率） % of change from the same period of previous year	2006/2 Fiscal year ended	対前年同期増減率（伸長率） % of change from the same period of previous year	2006/8 Six months ended	対前年同期増減率（伸長率） % of change from the same period of previous year	2007/2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	482	(△2.7%)	467	(△3.8%)	464	(△4.9%)	456	(△3.4%)
全店 平均日販 Average daily sales at all stores in chain	480	△ 1.6%	466	△ 2.7%	461	△ 4.1%	454	△ 2.6%

※　ＦＤ商品販売強化店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

	2005/8 Six months ended	対前年同期増減率（伸長率） % of change from the same period of previous year	2006/2 Fiscal year ended	対前年同期増減率（伸長率） % of change from the same period of previous year	2006/8 Six months ended	対前年同期増減率（伸長率） % of change from the same period of previous year
既存店平均客数（人） Number of customers per day at existing-stores	866	(△ 2.1%)	842	(2.5%)	847	(△ 3.5%)
全店平均客数（人） Number of customers per day at all stores in chain	865	△ 1.1%	842	△ 1.3%	845	△ 2.3%
既存店平均客単価 Sales per customer at existing-stores	¥557	(△ 0.5%)	¥554	(△ 1.4%)	¥547	(△ 1.4%)
全店平均客単価 Sales per customer at all stores in chain	¥555	△ 0.6%	¥554	△ 1.4%	¥545	△ 1.8%

※　ＦＤ商品販売強化店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）

	2005/8 Six months ended	対前年同期増減率 % of change from the same period of previous year	2006/2 Fiscal year ended	対前年同期増減率 % of change from the same period of previous year	2006/8 Six months ended	対前年同期増減率 % of change from the same period of previous year
1店舗当たり期末平均在庫 Average inventory	5,534	0.5%	5,404	△ 1.5%	5,646	2.0%
Ｂｏｏｋ併設店 at stores with book store attached	20,822	△ 4.0%	21,756	△ 0.4%	21,475	3.1%
その他 at other stores	5,106	0.9%	5,001	△ 0.6%	5,258	3.0%

※　ＦＤ商品販売強化店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）

	2005/8	2006/2	2006/8
１店舗当たり加盟店貸勘定 Average franchised stores credit accounts	873	1,109	951
Ｂｏｏｋ併設店 at stores with book store attached	4,488	5,320	4,451
その他 at other stores	785	1,004	864
１店舗当たり加盟店借勘定 Average franchised stores debit accounts	256	94	186
Ｂｏｏｋ併設店 at stores with book store attached	506	35	605
その他 at other stores	249	95	176

※　ＦＤ商品販売強化店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

	2005/8 Six months ended	2006/2 Fiscal year ended	2006/8 Six months ended	2007/2予想 Fiscal year ended (Forecast)
加工食品 Processed foods	33.0%	32.8%	32.9%	32.8%
ファストフード Fast foods	33.1%	32.8%	33.1%	32.7%
デイリー食品 Fresh foods	34.0%	33.9%	34.1%	33.9%
非食品 Non-consumables	17.5%	17.5%	17.1%	17.1%
本・サービス Books and services	24.5%	24.9%	27.0%	26.2%
合計 Total	29.3%	29.2%	29.6%	29.2%

※　ＦＤ商品販売強化店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）

	2005/8 Six months ended	2006/2 Fiscal year ended	2006/8 Six months ended	2007/2予想 Fiscal year ended (Forecast)
店　舗　投　資 Stores	397	1,055	655	1,673
本部関連投資 Head office facilities	157	486	334	1,504
合　計 Total	555	1,541	990	3,177

５．減価償却費の状況　Depreciation

（百万円／Millions of yen）

	2005/8 Six months ended	2006/2 Fiscal year ended	2006/8 Six months ended	2007/2予想 Fiscal year ended (Forecast)
店　舗　投　資 Stores	258	542	258	517
本部関連投資 Head office facilities	299	608	210	428
合　計 Total	558	1,150	468	946

貸借対照表主要項目　Summary of interim non-consolidated balance sheets

（百万円／Millions of yen）

	2005/8	構成比 Proportion	2006/8	構成比 Proportion	増減率 % of change from the same period of previous year	増減要因
資産合計 Total assets	19,306	100.0%	20,803	100.0%	7.8%	
流動資産 Current assets	6,035	31.3%	7,174	34.5%	18.9%	
現金預金 Cash and deposits	3,737	19.4%	4,587	22.1%	22.7%	
加盟店貸勘定 Franchised stores credit accounts	535	2.8%	563	2.7%	5.3%	
棚卸資産 Inventories	355	1.8%	494	2.4%	39.3%	直営店　８９店 → １２０店
未収入金 Accounts receivable	213	1.1%	241	1.2%	12.9%	
固定資産 Fixed assets	13,270	68.7%	13,629	65.5%	2.7%	
有形固定資産 Tangeble fixed assets	4,742	24.6%	4,683	22.5%	△1.2%	
自社有形固定資産 Company-held tangeble fixed assets	1,606	8.3%	1,803	8.7%	12.2%	
建物 Buildings	825	4.3%	1,242	6.0%	50.5%	
土地 Land	737	3.8%	497	2.4%	△32.6%	
貸与有形固定資産 Loaned tangeble fixed assets	3,135	16.3%	2,880	13.8%	△8.1%	
建物 Buildings	2,406	12.5%	2,164	10.4%	△10.0%	
土地 Land	563	2.9%	563	2.7%	—	
無形固定資産 Intangeble fixed assets	1,089	5.6%	1,319	6.3%	21.1%	
ソフトウェア Software	1,020	5.3%	1,252	6.0%	22.7%	2006/8 取得　747百万円　償却　515百万円
投資その他の資産 Investments and other assets	7,438	38.5%	7,626	36.7%	2.5%	
敷金・保証金 Fixed leasehold deposits	7,024	36.4%	7,206	34.6%	2.6%	
負債合計 Total liabilities	13,088	67.8%	14,740	70.9%	12.6%	
流動負債 Current liabilities	10,619	55.0%	11,539	55.5%	8.7%	
買掛金 Trade payable	896	4.6%	1,220	5.9%	36.2%	直営店　８９店 → １２０店
加盟店買掛金 Accounts payable of franchised stores	5,229	27.1%	5,071	24.4%	△3.0%	加盟店　５４７店 → ５３３店
未払金 Accounts payable-other	975	5.1%	1,115	5.4%	14.3%	
預り金 Deposits received	2,231	11.6%	2,460	11.8%	10.3%	収納代行預り金　2,168百万円 → 2,398百万円 取扱件数　5,025千件 → 5,446千件
固定負債 Fixed liabilities	2,468	12.8%	3,201	15.4%	29.7%	
社債 Bonds	1,000	5.2%	—	—	—	
長期借入金 Long-term debt	637	3.3%	2,351	11.3%	269.1%	
預り保証金 Guaranty deposits received	732	3.8%	750	3.6%	2.4%	
純資産合計 Total net assets	6,217	32.2%	6,063	29.1%	△2.5%	
株主資本 Shareholders' equity	6,196	32.1%	6,035	29.0%	△2.6%	
評価・換算差額等 Total valuation and translationn adjustment	21	0.1%	27	0.1%	30.3%	
有利子負債 Interest bearing debts	1,958	10.1%	3,193	15.4%	63.1%	

損益計算書主要項目　Summary of interim non-consolitated statements of income

（百万円／Millions of yen）

	2005/8	売上比 Ratio to gross operating receipts	2006/8	売上比 Ratio to gross operating receipts	増減率 % of change from the same period of previous year	増減要因
営業総収入 Gross operating receipts	13,964	100.0%	15,410	100.0%	10.4%	
営業収入 Operating revenues	7,203	51.6%	6,768	43.9%	△6.0%	
売上高 Sales	6,760	48.4% (100.0%)	8,642	56.1% (100.0%)	27.8%	期中平均直営店　９１店　→　１１９店
売上原価 Cost of sales	4,996	(73.9%)	6,485	(75.0%)	29.8%	
営業総利益 Total operating profit	8,967	64.2%	8,925	57.9%	△0.5%	
販売費及び一般管理費 Selling, general and administrative expenses	8,072	57.8%	8,240	53.5%	2.1%	
従業員給与・賞与 Employees' salaries and bonuses	1,051		1,089			従業員数　４６０人　→　４８８人
賃借料 Rental cost	1,913		2,070			期中平均直営店及びCタイプ店 ４３２店　→　４６２店
リース料 Lease expenses	1,225		900			期中平均店舗数 ６３４店　→　６５３店
営業利益 Operating income	895	6.4%	685	4.4%	△23.5%	
営業外収益 Non-operating income	33	0.2%	53	0.3%	59.9%	
受取利息 Interest received	19		23			
営業外費用 Non-operating expenses	17	0.1%	22	0.1%	28.2%	
支払利息 Interest expenses	8		11			
経常利益 Ordinary income	910	6.5%	716	4.6%	△21.4%	
特別利益 Special gains	5	0.0%	72	0.5%	1179.2%	
特別損失 Special losses	130	0.9%	632	4.1%	383.7%	（主要特別損失 内訳）
固定資産除却損 Loss from disposal of fixed assets	77		155			２００５/８　２００６/８
リース解約損 Loss on lease cancellations	39		75			閉店　９店　２１店 １２４百万円　３４１百万円
賃貸借契約解約損 Loss on lease cancellations	11		111			ﾘﾆｭｰｱﾙ　７店　５店 ４百万円　２百万円
減損損失 Loss of impairmennt assets	―		289			減損損失　―　２８９百万円
法人税、住民税及び事業税 Corporation, inhabitants and enterprise taxes	376	2.7%	219	1.4%	△41.5%	
法人税等調整額 Income taxes-deferred	△ 20	△0.1%	△115	△0.7%	460.7%	
中間純利益 Net income	430	3.1%	51	0.3%	△88.1%	
１株当たり中間純利益 Earnings per share		55.92円		6.68円		
１株当たり中間配当金 Dividend per share		11円		11円		