


連結ベース Consolidated basis

1. 業績の推移 Results and Forecast

 上段: 百万円、下段: 増減率
 Upper: Millions of yen, Lower: Y/Y

	2023/3	2024/3	2025/3			2026/3
	FY (22.4-23.3)	FY (23.4-24.3)	1H (24.4-9)	2H (24.10-25.3)	FY (24.4-25.3)	FY (25.4-26.3) Forecast
売上収益 Revenue	764,702 +3.4%	741,391 -3.0%	386,443 +4.5%	366,687 -1.4%	753,130 +1.6%	700,000 -7.1%
国内 (Domestic)	122,978 +4.2%	123,222 +0.2%	63,512 +3.4%	63,656 +3.1%	127,168 +3.2%	131,000 +3.0%
海外 (Overseas)	641,724 +3.3%	618,169 -3.7%	322,931 +4.8%	303,031 -2.2%	625,962 +1.3%	569,000 -9.1%
営業利益 Operating Profit	28,246 -69.2%	66,169 +134.3%	51,415 +61.9%	55,623 +61.7%	107,038 +61.8%	74,000 -30.9%
税引前利益 Profit before Income Taxes	23,887 -74.2%	64,017 +168.0%	51,323 +70.9%	57,154 +68.2%	108,477 +69.5%	74,000 -31.8%
親会社の所有者に 帰属する当期利益 Profit attributable to owners of the parent	11,705 -81.9%	43,691 +273.3%	38,200 +83.5%	41,138 +79.8%	79,338 +81.6%	54,000 -31.9%
1株当たり利益 EPS	円 Yen 43.11	円 Yen 162.13	円 Yen 141.99	円 Yen 152.91	円 Yen 294.90	円 Yen 200.71
株主資本利益率 (年率換算) ROE	1.5%	5.3%	8.8%	9.1%	8.8%	5.8%

売上計上為替レート Exchange rates

単位: 円 Yen

	2023/3	2024/3	2025/3			2026/3
	FY (22.4-23.3)	FY (23.4-24.3)	1H (24.4-9)	2H (24.10-25.3)	FY (24.4-25.3)	FY (25.4-26.3) Forecast
米ドル USD	135.50	144.59	152.78	152.46	152.62	140
ユーロ EUR	140.99	156.75	166.07	161.69	163.88	160
人民元 RMB	19.75	20.13	21.16	21.06	21.11	19.5

四半期 Quarterly

 上段: 百万円、下段: 増減率
 Upper: Millions of yen, Lower: Y/Y

	2024/3				2025/3			
	1Q (23.4-6)	2Q (23.7-9)	3Q (23.10-12)	4Q (24.1-3)	1Q (24.4-6)	2Q (24.7-9)	3Q (24.10-12)	4Q (25.1-3)
売上収益 Revenue	184,455 -5.6%	185,212 -5.5%	180,947 -4.2%	190,777 +3.4%	193,932 +5.1%	192,511 +3.9%	182,112 +0.6%	184,575 -3.3%
国内 (Domestic)	29,978 -4.6%	31,473 +3.5%	30,246 +4.4%	31,525 -2.0%	30,515 +1.8%	32,997 +4.8%	31,239 +3.3%	32,417 +2.8%
海外 (Overseas)	154,477 -5.8%	153,739 -7.1%	150,701 -5.8%	159,252 +4.6%	163,417 +5.8%	159,514 +3.8%	150,873 +0.1%	152,158 -4.5%
営業利益 Operating Profit	16,311 +7.1%	15,449 +130.9%	16,289 +210.9%	18,120 +1565.4%	21,344 +30.9%	30,071 +94.6%	30,919 +89.8%	24,704 +36.3%
税引前利益 Profit before Income Taxes	16,045 +2.1%	13,991 +455.6%	16,077 +107.0%	17,904 +946.5%	21,338 +33.0%	29,985 +114.3%	32,419 +101.6%	24,735 +38.2%
親会社の所有者に 帰属する当期利益 Profit attributable to owners of the parent	11,185 +5.9%	9,631 +1770.1%	11,821 +276.3%	11,054 +539.7%	16,010 +43.1%	22,190 +130.4%	23,643 +100.0%	17,495 +58.3%
1株当たり利益 EPS	円 Yen 41.30	円 Yen 35.81	円 Yen 43.93	円 Yen 41.09	円 Yen 59.51	円 Yen 82.48	円 Yen 87.89	円 Yen 65.02

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2. 地域別売上収益 Revenue by geographic area

 上段: 百万円、下段: 増減率
 Upper: Millions of yen, Lower: Y/Y

	2023/3	2024/3	2025/3			2026/3
	FY (22.4-23.3)	FY (23.4-24.3)	1H (24.4-9)	2H (24.10-25.3)	FY (24.4-25.3)	FY (25.4-26.3) Forecast
国内市場 Japan	122,978 +4.2%	123,222 +0.2%	63,512 +3.4%	63,656 +3.1%	127,168 +3.2%	131,000 +3.0%
欧州市場 Europe	348,994 -1.0%	356,491 +2.1%	193,973 +10.1%	177,825 -1.4%	371,798 +4.3%	351,000 -5.6%
北米市場 North America	119,064 +6.1%	93,677 -21.3%	45,313 -10.2%	38,606 -10.6%	83,919 -10.4%	54,000 -35.1%
アジア市場 Asia	53,276 +8.3%	46,133 -13.4%	21,846 -2.5%	23,185 -2.3%	45,031 -2.4%	41,500 -7.8%
中南米市場 Central and South America	47,256 +13.1%	49,697 +5.2%	25,672 +5.6%	25,015 -1.4%	50,687 +2.0%	49,000 -3.3%
オセアニア市場 Oceania	58,593 +13.6%	56,340 -3.8%	27,568 +0.3%	28,234 -2.2%	55,802 -1.0%	51,500 -7.7%
中近東・アフリカ市場 The Middle East/Africa	14,541 +4.2%	15,831 +8.9%	8,558 +16.1%	10,168 +20.2%	18,726 +18.3%	21,500 +14.8%
合計 Total	764,702 +3.4%	741,391 -3.0%	386,443 +4.5%	366,689 -1.4%	753,130 +1.6%	700,000 -7.1%

四半期 Quarterly

 上段: 百万円、下段: 増減率
 Upper: Millions of yen, Lower: Y/Y

	2024/3				2025/3			
	1Q (23.4-6)	2Q (23.7-9)	3Q (23.10-12)	4Q (24.1-3)	1Q (24.4-6)	2Q (24.7-9)	3Q (24.10-12)	4Q (25.1-3)
国内市場 Japan	29,978 -4.6%	31,473 +3.5%	30,246 +4.4%	31,525 -2.0%	30,515 +1.8%	32,997 +4.8%	31,239 +3.3%	32,417 +2.8%
欧州市場 Europe	89,249 -5.3%	86,915 +4.5%	85,134 -0.6%	95,193 +10.7%	98,379 +10.2%	95,594 +10.0%	86,621 +1.7%	91,204 -4.2%
北米市場 North America	24,822 -10.9%	25,663 -26.3%	22,705 -23.5%	20,487 -23.3%	21,644 -12.8%	23,669 -7.8%	20,832 -8.2%	17,774 -13.2%
アジア市場 Asia	11,115 -4.1%	11,292 -35.3%	12,043 -8.8%	11,683 +5.9%	10,752 -3.3%	11,094 -1.8%	11,595 -3.7%	11,590 -0.8%
中南米市場 Central and South America	11,209 -6.4%	13,108 +5.6%	12,820 +3.1%	12,560 +20.5%	12,774 +14.0%	12,898 -1.6%	13,009 +1.5%	12,006 -4.4%
オセアニア市場 Oceania	14,391 -3.9%	13,083 -7.6%	13,896 -7.8%	14,970 +4.1%	16,022 +11.3%	11,546 -11.7%	13,915 +0.1%	14,319 -4.3%
中近東・アフリカ市場 The Middle East/Africa	3,691 +10.5%	3,678 +4.4%	4,103 +3.5%	4,359 +17.3%	3,846 +4.2%	4,712 +28.1%	4,902 +19.5%	5,266 +20.8%
合計 Total	184,455 -5.6%	185,212 -5.5%	180,947 -4.2%	190,777 +3.4%	193,932 +5.1%	192,511 +3.9%	182,112 +0.6%	184,577 -3.2%

連結ベース

 Consolidated basis

3. 現地通貨四半期ベース売上動向 Revenue growth in local currency quarterly basis

	2023/3	2024/3	2025/3				
	FY (22.4-23.3)	FY (23.4-24.3)	1Q (24.4-6)	2Q (24.7-9)	3Q (24.10-12)	4Q (25.1-3)	FY (24.4-25.3)
国内市場 Japan	+4.2%	+0.2%	+1.8%	+4.8%	+3.3%	+2.8%	+3.2%
欧州市場 Europe	-10.4%	-4.3%	-0.8%	+4.7%	+0.2%	-4.6%	-0.2%
西欧市場 Western Europe	-13.2%	-2.7%	+0.3%	+4.4%	+1.8%	-1.4%	+1.2%
東欧市場 Eastern Europe	-5.9%	-6.6%	-2.2%	+5.1%	-2.4%	-10.5%	-2.5%
北米市場 North America	-11.5%	-26.1%	-22.9%	-11.2%	-10.4%	-14.3%	-14.8%
アジア市場 Asia	-5.6%	-17.2%	-11.6%	-4.8%	-5.4%	-2.2%	-6.0%
中南米市場 Central and South America	-2.6%	-0.8%	+3.3%	+4.1%	+12.0%	+7.2%	+6.7%
オセアニア市場 Oceania	+2.4%	-6.5%	-0.3%	-15.6%	-2.9%	-3.0%	-5.2%
中近東・アフリカ市場 The Middle East/Africa	-11.1%	+1.8%	-7.2%	+22.9%	+14.9%	+18.2%	+12.5%
海外合計 Overseas	-8.6%	-9.2%	-4.9%	-0.0%	-0.7%	-4.0%	-2.4%
合計 Total	-6.6%	-7.7%	-3.8%	+0.8%	-0.1%	-2.8%	-1.5%

4. 設備投資額・減価償却費・研究開発費・従業員数 Capex, Depreciation, R&D and Employees

単位: 百万円 Millions of yen

	2023/3	2024/3	2025/3			2026/3
	FY (22.4-23.3)	FY (23.4-24.3)	1H (24.4-9)	2H (24.10-25.3)	FY (24.4-25.3)	FY (25.4-26.3) Forecast
設備投資額 Capex	39,088	17,851	9,625	7,969	17,594	28,000
減価償却費 Depreciation	21,725	24,754	12,701	12,233	24,934	25,000
研究開発費 R&D	14,903	14,314	7,438	7,676	15,114	16,500
従業員数 Employees	18,804	17,669	17,591	-	17,641	-

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 Consolidated basis

5. 生産台数 Production

上段：万台、下段：構成比
Upper: 10 thousand of units, Lower: Composition

	2023/3	2024/3	2025/3			2026/3
	FY (22.4-23.3)	FY (23.4-24.3)	1H (24.4-9)	2H (24.10-25.3)	FY (24.4-25.3)	FY (25.4-26.3) Forecast
国 内 Japan	207 7.9%	194 8.3%	103 6.9%	113 7.8%	216 7.4%	210 7.4%
欧 州 Europe	509 19.4%	584 25.0%	362 24.3%	378 26.1%	740 25.2%	712 25.2%
北 米 North America	75 2.8%	52 2.2%	34 2.3%	32 2.2%	66 2.2%	61 2.2%
ア ジ ア Asia	1,743 66.1%	1,391 59.6%	907 61.1%	850 58.6%	1,757 59.8%	1,694 59.9%
中 南 米 Central and South America	101 3.8%	115 4.9%	80 5.4%	77 5.3%	157 5.4%	153 5.4%
海 外 工 場 計 Overseas	2,428 92.1%	2,142 91.7%	1,383 93.1%	1,337 92.2%	2,720 92.6%	2,620 92.6%
合 計 Total	2,635 100.0%	2,336 100.0%	1,486 100.0%	1,450 100.0%	2,936 100.0%	2,830 100.0%

四半期 Quarterly

上段：万台、下段：構成比
Upper: 10 thousand of units, Lower: Composition

	2024/3				2025/3			
	1Q (23.4-6)	2Q (23.7-9)	3Q (23.10-12)	4Q (24.1-3)	1Q (24.4-6)	2Q (24.7-9)	3Q (24.10-12)	4Q (25.1-3)
国 内 Japan	54 8.9%	47 8.3%	47 8.2%	46 7.9%	52 7.2%	51 6.7%	56 7.7%	57 7.9%
欧 州 Europe	138 23.0%	143 24.7%	140 24.4%	163 28.0%	173 23.8%	189 24.9%	183 25.3%	195 26.9%
北 米 North America	11 1.9%	11 1.9%	14 2.4%	16 2.7%	17 2.3%	17 2.2%	14 2.0%	18 2.4%
ア ジ ア Asia	370 61.8%	351 60.6%	344 60.1%	326 55.6%	446 61.3%	461 60.8%	431 59.6%	419 57.6%
中 南 米 Central and South America	26 4.4%	26 4.5%	29 4.9%	34 5.8%	39 5.4%	41 5.4%	39 5.4%	38 5.2%
海 外 工 場 計 Overseas	545 91.1%	531 91.7%	527 91.8%	539 92.1%	675 92.8%	708 93.3%	667 92.3%	670 92.1%
合 計 Total	599 100.0%	578 100.0%	574 100.0%	585 100.0%	727 100.0%	759 100.0%	723 100.0%	727 100.0%

(注) 上記の予想は現時点で入手可能な情報に基づき作成しており、不確実性が含まれています。実際の業績は予想とは異なる可能性があります。

Note: The above forecast is based on information as available at the present time, and includes uncertainties. A actual result may vary from the above forecast.