

Summary

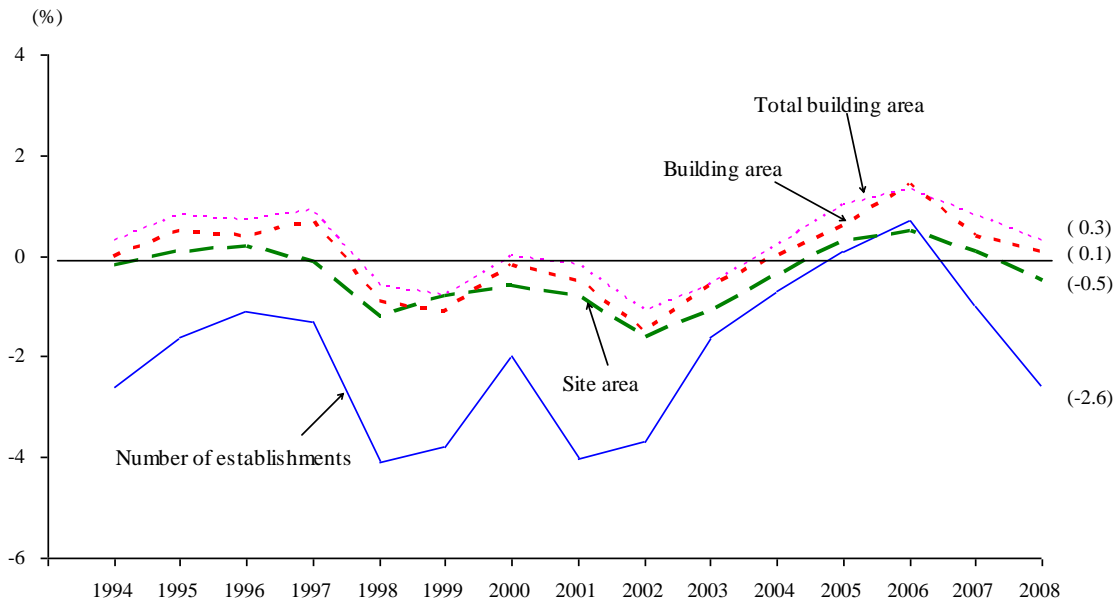
I. Land for industrial use

The number of manufacturing establishments with 30 or more employees in 2008 was 46,455, down by 2.6% compared to the previous year, down for the second consecutive year.

The site area of establishments was 1,424.15 million m² (down by 0.5% compared to the previous year), down for the first time in four years. The building area was 390.91 million m² (up by 0.1% id.), up for the fourth consecutive year and the total building area was 528.94 million m² (up by 0.3% id.), up for the fifth consecutive year. Also the value of product shipments per 1,000 m² of total building area was 561.88 million yen (down by 0.7% id.). (Table 1, Figure 1)

In additional, the site area per establishment was 30,656 m² (up by 2.2% id.) on average across all the manufacturing industries.

Figure 1: Changes in Major Items of Land for Industrial Use
(Establishments with 30 or more employees)



Note: The figures in parentheses represent year-on-year comparison in 2008.

Table 1: Changes in Major Items of Land for Industrial Use
(Establishments with 30 or more employees)

Year	Number of establishments		Site area		Building area		Total building area		Shipment value per 1,000 m ² of total building area	
		Y/Y (%)	(1,000 m ²)	Y/Y (%)	(1,000 m ²)	Y/Y (%)	(1,000 m ²)	Y/Y (%)	(10,000 yen)	Y/Y (%)
1999	52,469	-3.8	1,462,761	-0.8	386,057	-1.1	514,749	-0.8	48,286	-3.2
2000	51,434	-2.0	1,453,612	-0.6	385,355	-0.2	514,995	0.0	50,098	3.8
2001	49,364	-4.0	1,442,586	-0.8	383,510	-0.5	513,982	-0.2	48,010	-4.2
2002	47,046	-3.7	1,418,233	-1.6	377,166	-1.5	505,230	-1.1	46,164	-2.7
2003	46,283	-1.6	1,403,172	-1.1	374,852	-0.6	502,214	-0.6	47,367	2.6
2004	45,970	-0.7	1,397,011	-0.4	374,978	0.0	503,110	0.2	49,387	4.3
2005	46,029	0.1	1,400,963	0.3	377,311	0.6	508,147	1.0	51,098	3.5
2006	46,366	0.7	1,407,682	0.5	382,765	1.4	514,687	1.3	54,244	6.2
2007	47,682	-1.0	1,430,605	0.1	390,400	0.4	527,125	0.8	56,583	-
2008	46,455	-2.6	1,424,146	-0.5	390,905	0.1	528,943	0.3	56,188	-0.7

- Notes: 1. Because of the revision of the Japan Standard Industrial Classification in the 2002 Survey, the year-on-year comparisons have been computed by reclassifying the 2001 classification.
2. The year-on-year comparisons in 2004 have been computed while taking into account the establishments excluded due to the "Niigata-Chuetsu Earthquake."
3. As a survey on establishments was conducted as part of the 2007 Survey, year-on-year comparisons have been computed by taking time series into account and excluding the establishments surveyed.
4. As survey items were changed in the 2007 Survey, the value of product shipments per 1,000 m² of total building area in 2007 is not related to that in the previous year.

1. Situation by industry

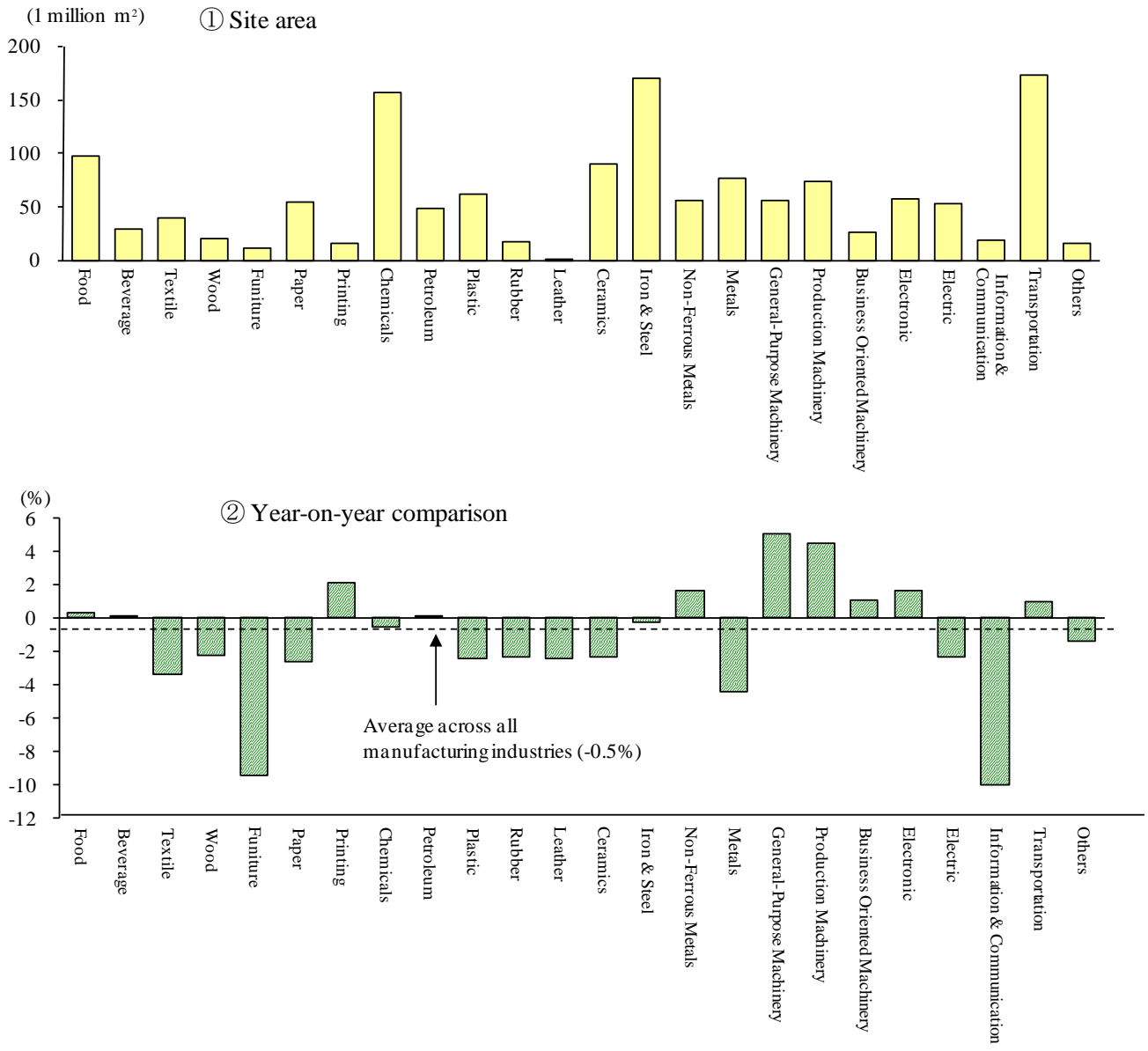
(1) Site area

- ① The site area of establishments was 1,424.15 million m² (down by 0.5% compared to the previous year), down for the first time in four years.

By industry, those with a large site area were "Manufacture of transportation equipment" (173.99 million m², composition ratio of 12.2%), "Manufacture of iron and steel" (169.99 million m², 11.9% id.), "Manufacture of chemical and allied products" (157.05 million m², 11.0% id.), "Manufacture of food" (97.20 million m², 6.8% id.), "Manufacture of ceramic, stone and products" (90.49 million m², 6.4% id.), "Manufacture of fabricated metal products" (76.73 million m², 5.4% id.) and "Manufacture of production machinery" (73.77 million m², 5.2% id.).

On a year-on-year basis, decreases were observed in 14 industries, including "Manufacture of information and communication electronics equipment" (down by 10.1% compared to the previous year), "Manufacture of furniture and fixtures" (down by 9.5% id.), "Manufacture of fabricated metal products" (down by 4.4% id.), "Manufacture of textile mill products" (down by 3.4% id.) and "Manufacture of pulp, paper and paper products" (down by 2.6% id.). In the meantime, increases were observed in 10 industries, including "Manufacture of general-purpose machinery" (up by 5.1% id.), "Manufacture of production machinery" (up by 4.5% id.) and "Printing and allied industries" (up by 2.1% id.). (Figure 2)

Figure 2: Site Area by Industry
(Establishments with 30 or more employees)

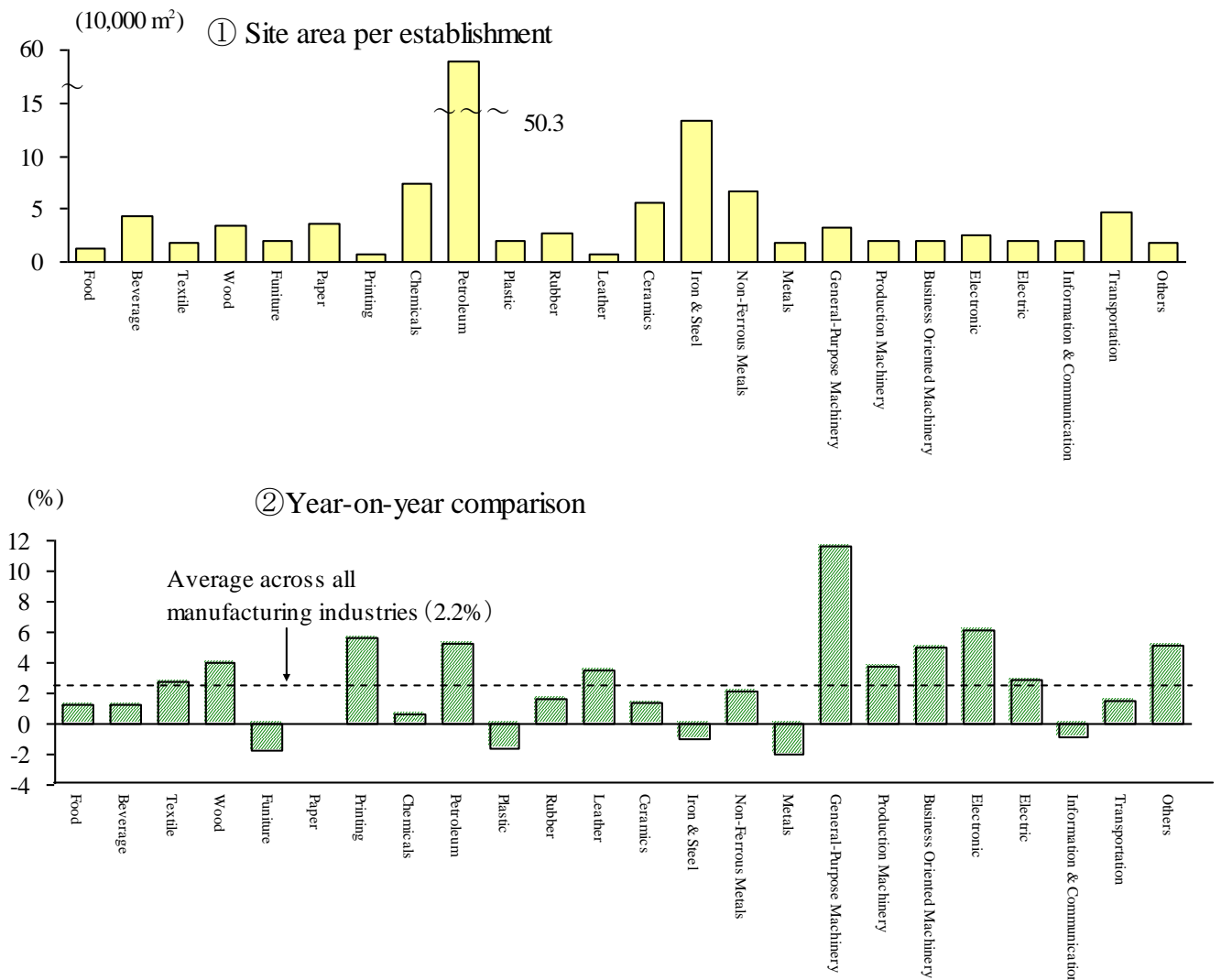


② The site area per establishment was 30,656 m², down by 2.2% from the previous year .

By industry, "Manufacture of petroleum and coal products" (502,642 m²) was the largest by far, followed by "Manufacture of iron and steel" (133,639 m²), "Manufacture of chemical and allied products" (73,014 m²) and "Manufacture of non-ferrous metals and products" (67,134 m²), placing equipment-related industries in top-ranking positions. There were no changes in orders from the previous year or in trends so far.

On a year-on-year basis, increases were observed in 18 industries, including "Manufacture of general-purpose machinery" (up by 11.6% compared to the previous year), "Manufacture of electronic parts, devices and electronic circuits" (up by 6.2% id.), "Printing and allied industries" (up by 5.6% id.), and "Manufacture of petroleum and coal products" (up by 5.3% id.). In the meantime, decreases were observed in five industries, including "Manufacture of fabricated metal products" (down by 2.0% id.), "Manufacture of furniture and fixtures" (down by 1.8% id.), and "Manufacture of plastic products, except otherwise classified" (down by 1.6% id.). "Manufacture of pulp, paper and paper products" remained flat. (Figure 3)

Figure 3: Site Area per Establishment by Industry
(Establishments with 30 or more employees)



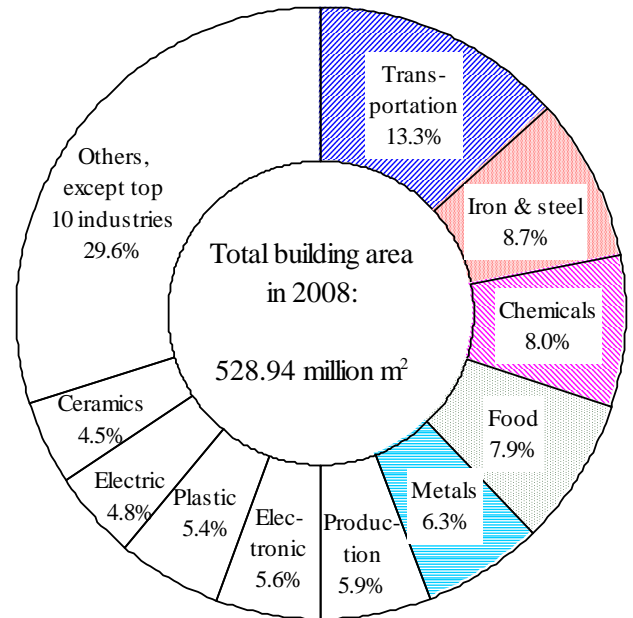
(2) Total building area

The total building area was 528.94 million m², up by 0.3% compared to the previous year, up for the fifth consecutive year.

By industry, those with a large site area were "Manufacture of transportation equipment" (70.23 m², composition ratio of 13.3%), "Manufacture of Iron and steel" (45.92 million m², 8.7% id.), "Manufacture of chemical and allied products" (42.12 million m², 8.0% id.), "Manufacture of food" (41.67 million m², 7.9% id.), "Manufacture of fabricated metal products" (33.28 million m², 6.3% id.) and "Manufacture of production machinery" (31.12 million m², 5.9% id.).

On a year-on-year basis, increases were observed in 12 industries, including "Manufacture of general-purpose machinery" (up by 5.7% compared to the previous year), "Manufacture of production machinery" (up by 4.7% id.), "Manufacture of business oriented machinery" (up by 3.1% id.) and "Manufacture of electronic parts, devices and electronic circuits" (up by 2.9% id.). In the meantime, decreases were observed in 12 industries, including "Manufacture of furniture and fixtures" (down by 9.4% id.), "Manufacture of information and communication electronics equipment" (down by 8.6% id.), and "Manufacture of leather tanning, leather products and fur skins" (down by 4.6% id.). (Figure 4)

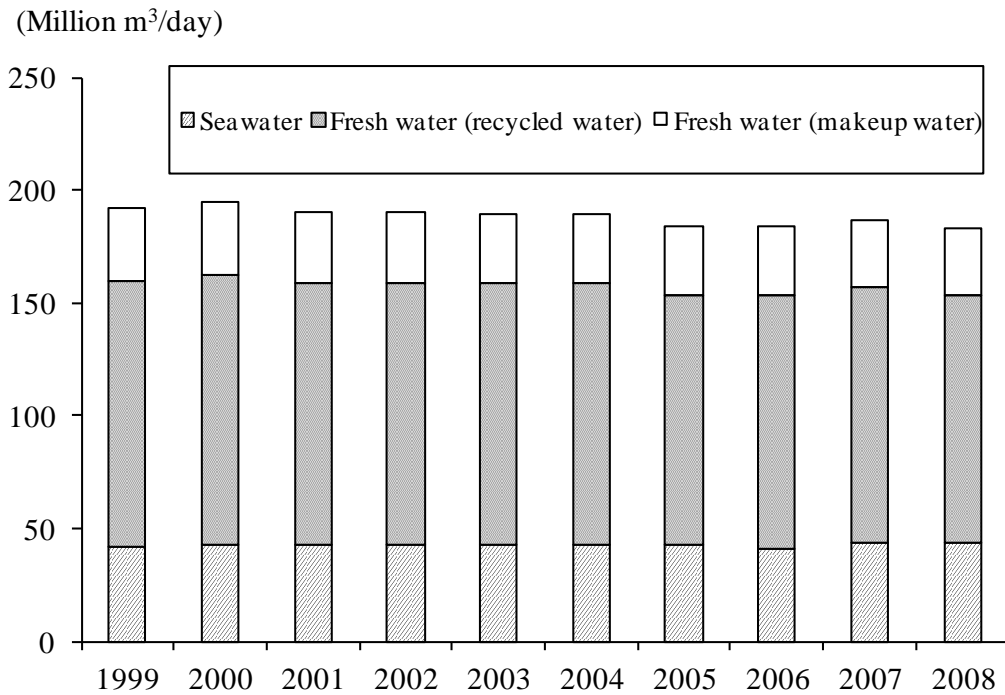
Figure 4: Breakdown of the Total Building Area by Industry
(Establishments with 30 or more employees)



II. Industrial water

The industrial water requirement per day at manufacturing establishments with 30 or more employees in 2008 (hereinafter referred to as "water requirement") was 182.77 million m³ (down by 2.2% compared to the previous year), of which fresh water was 139.54 million m³ (down by 2.6% id., composition ratio of 76.3%) and seawater was 43.23 million m³ (down by 1.1% id., 23.7% id.). (Figure 5)

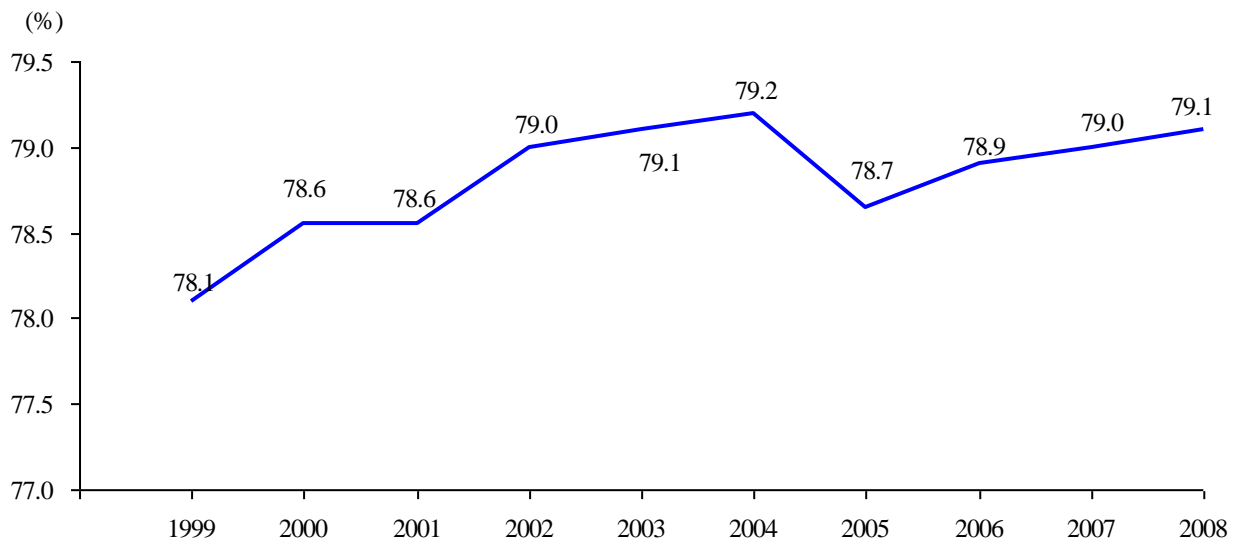
Figure 5: Changes in Industrial Water Requirement per Day
(Establishments with 30 or more employees)



Note: "Fresh water (makeup water)" is the total of "fresh water" other than "recycled water," i.e. "public water works," "well water," and "other fresh water."

In addition, the recycle rate of fresh water (the ratio of recycled water to the total volume of fresh water) was 79.1% in the total manufacturing industries, up slightly by 0.1 % compared to the previous year, up for the third consecutive year. (Figure 6)

Figure 6: Changes in Recycle Rate of Fresh Water
(Establishments with 30 or more employees)



**Table 2: Changes in Industrial Water Requirement and Fresh Water Requirement
by Source and by Use
(Establishments with 30 or more employees)**

Year	Number of establishments		Water requirement									
			Total		Total fresh water			Recycle rate of fresh water		Total seawater		
	Y/Y (%)	Y/Y (%)	Y/Y (%)	Y/Y (%)	Y/Y (%)	Percentage (%)	Recycle rate (%)	Difference from the previous year (Point)	Y/Y (%)	Percentage (%)		
											(1000 m ³ /day)	(1000 m ³ /day)
1999	52,469	-3.8	192,244	-0.8	150,277	-0.6	78.2	78.1	0.1	41,967	-1.6	21.8
2000	51,434	-2.0	194,952	1.4	151,965	1.1	77.9	78.6	0.5	42,988	9.6	22.1
2001	49,364	-4.0	190,547	-2.3	147,978	-2.6	77.7	78.6	0.0	42,569	-1.0	22.3
2002	47,046	-3.7	189,774	-0.3	147,021	-0.5	77.5	79.0	0.4	42,753	0.0	22.5
2003	46,283	-1.6	188,888	-0.5	145,742	-0.9	77.2	79.1	0.1	43,146	0.9	22.8
2004	45,970	-0.7	188,968	0.0	145,937	0.1	77.2	79.2	0.1	43,031	-0.3	22.8
2005	46,029	0.1	183,710	-2.8	141,437	-3.1	77.0	78.7	-0.5	42,273	-1.8	23.0
2006	46,366	0.7	183,463	-0.1	142,614	0.8	77.7	78.9	0.2	40,849	-3.4	22.3
2007	47,682	-1.0	186,936	1.7	143,227	0.1	76.6	79.0	0.1	43,709	7.0	23.4
2008	46,455	-2.6	182,767	-2.2	139,542	-2.6	76.3	79.1	0.1	43,225	-1.1	23.7

1. Situation by industry

(1) Total water requirement

① Observing water requirement by industry, the top two industries, "Manufacture of chemical and allied products" (61.13 million m³, composition ratio of 33.4%) and "Manufacture of iron and steel" (55.36 million m³, 30.3% id.), account for more than 60%, followed by "Manufacture of petroleum and coal products" (15.54 million m³, 8.5% id.), "Manufacture of pulp, paper and paper products" (14.26 million m³, 7.8% (id.)), and "Manufacture of transportation equipment" (8.98 million m³, 4.9% (id.)). These five industries account for more than 80% of the total water requirement.

Industries which use a lot of fresh water were "Manufacture of chemical and allied products" (45.09 million m³, composition ratio in fresh water of 32.3%), "Manufacture of iron and steel" (38.70 million m³, 27.7% id.), "Manufacture of pulp, paper and paper products" (14.23 million m³, 10.2% id.), "Manufacture of transportation equipment" (8.95 million m³, 6.4% id.) and "Manufacture of petroleum and coal products" (8.31 million m³, 6.0% id.).

The three industries using the most seawater were "Manufacture of iron and steel" (16.66 million m³, composition ratio in seawater of 38.5%), "Manufacture of chemical and allied products" (16.04 million m³, 37.1% id.) and "Manufacture of petroleum and coal products" (7.23 million m³, 16.7% id.). These top three industries used more than 90% of the total. (Table 2, Figure 7)

Figure 7: Breakdown of Water Requirement by Industry
 (Establishments with 30 or more employees)

