

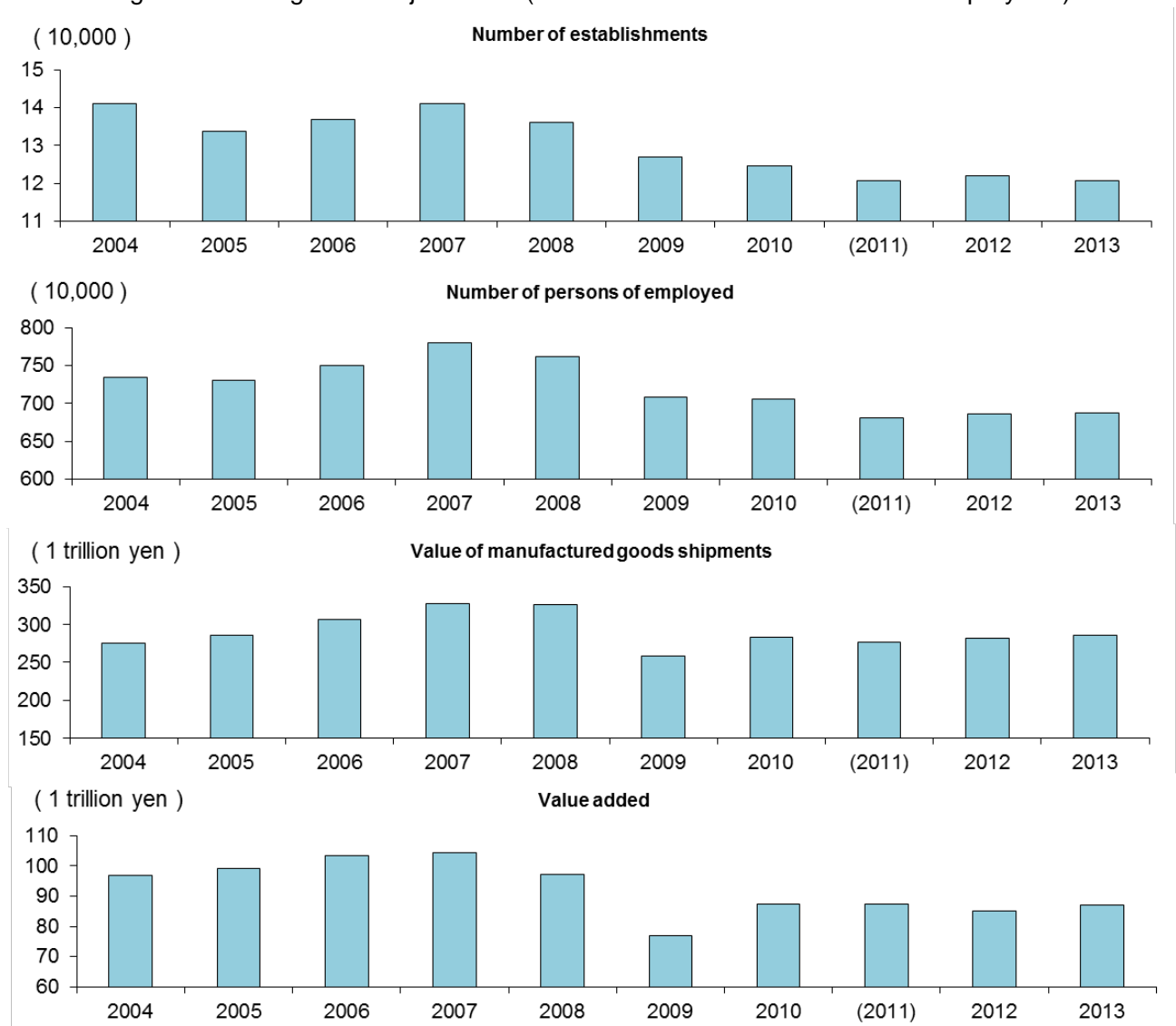
# Summary

## 1. Trends in establishments with 10 or more employees

— The number of establishments decreased for the first time in these two years, the number of persons employed increased for two consecutive years, and the value of manufactured goods shipments also increased for two consecutive years, while the value added increased for the first time in three years —

The number of establishments with 10 or more employees in 2013 is 120,533 (down 1.2% from the preceding year) showing a decrease for the first time in these two years. The number of persons employed is 6,868,748 (up 0.2% id.) and the value of manufactured goods shipments is 285.2742 trillion yen (up 1.3% id.), both showing an increase for two consecutive years. Meanwhile, the value added is 87.0264 trillion yen (up 2.3% id.) showing an increase for the first time in three years (Table 1, Figure 1).

Figure 1: Changes in Major Items (Establishments with 10 or more employees)



**Table 1: Changes in Major Items**  
(Establishments with 10 or more employees)

Year \ Item	Number of establishments		Number of persons employed		Value of manufactured goods shipments		Value added	
		Y/Y (%)	(persons)	Y/Y (%)	(100 million yen)	Y/Y (%)	(100 million yen)	Y/Y (%)
2004	141,046	-1.6	7,338,250	-0.1	2,750,796	4.1	968,199	3.2
2005	133,621	-5.3	7,305,133	-0.5	2,860,630	4.0	991,246	2.4
2006	136,917	2.5	7,494,312	2.6	3,064,740	7.1	1,032,929	4.2
2007	140,973	-2.7	7,806,315	0.9	3,280,069	-	1,043,345	-
2008	136,097	-3.5	7,618,941	-2.4	3,267,264	-0.4	970,203	-7.0
2009	127,004	-6.7	7,085,735	-7.0	2,581,545	-21.0	769,071	-20.7
2010	124,520	-2.0	7,061,000	-0.3	2,824,241	9.4	874,555	13.7
2011	120,723	-3.0	6,807,864	-3.6	2,765,669	-2.1	874,416	0.0
2012	121,942	1.0	6,854,404	0.7	2,815,983	1.8	850,320	-2.8
2013	120,533	-1.2	6,868,748	0.2	2,852,742	1.3	870,264	2.3

Note:

1. The value added data on establishments that have 10-29 employees represent gross value added.
2. The data for 2004 incorporate the survey results from the "2004 Census of Manufacture Fact-finding Survey accompanied with Niigata-Chuetsu Earthquake"(includes estimated figures).
3. As establishments were surveyed for the 2007 Census, year-on-year data on the number of establishments and the Number of persons employed have been calculated by taking time series factors into account and excluding the establishments surveyed.
4. As Japan Standard Industry Classification (JSIC) was revised, the year-on-year comparison data for 2008 are calculated after recounting the 2007 data based on the classification in 2008
5. Survey for 2011 was conducted in the Economic Census for Business Activity.

## 2. Situation by industry (Establishments with 10 or more employees)

### (1) Number of establishments: The number of establishments decreased for the first time in two years.

The number of establishments is 120,533 (down 1.2% from the preceding year) showing a decrease for the first time in two years (Table 1, Figure 1).

- ① Observing the number of establishments for 24 industry sectors on the year-on-year comparison basis (in order of the contribution degree\*1), the number of establishments has decreased in 20 industry sectors out of the total 24. These industry categories include "Manufacture of food" (down 1.6% id.), "Textile mill products" (down 3.3% id.) and "Transportation equipment" (down 1.7% id.). On the other hand, it has increased in 3 industry categories out of the total 24: "Fabricated metal products" (up 0.3% id.), "Leather tanning, leather products and fur skins" (up 5.6% id.), and "Rubber products" (up 0.2% id.) and has remained unchanged in "Business oriented machinery". (Table 2, Figure 2).

\*1 Industries exemplified for year-on-year changes in the text are listed in order of the contribution degree (excluding per establishment/per employees as well as by prefecture).

Contribution degree indicates how much a change in each factor will contribute to overall changes (Growth rate). It is expressed as follows: Contribution degree of Industry A = Year-on-year increase/decrease rate of Industry A x How much percentage Industry A occupies in the manufacturing industry in the preceding year.

Figure 2: Year-on-Year Comparison of Number of Establishments by Industry  
(Establishments with 10 or more employees)

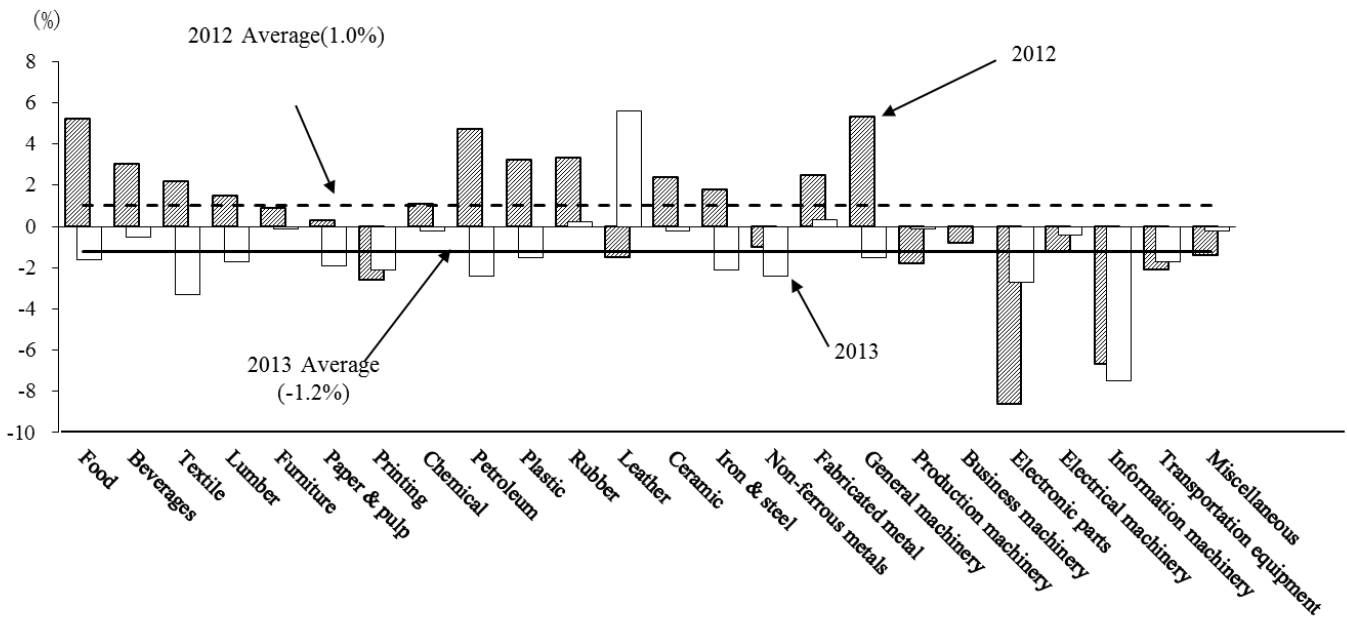
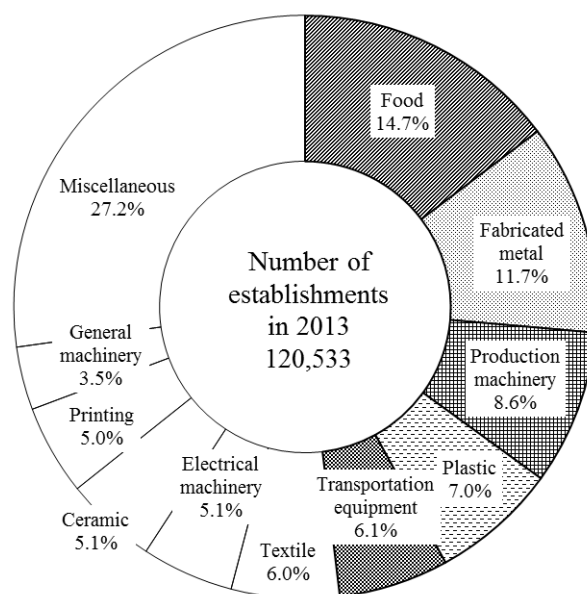


Table 2: Number of Establishments by Industry  
(Establishments with 10 or more employees)

Item Industry	Number of establishments					
	2012			2013		
	Actual count	Y/Y (%)	Percentage (%)	Actual count	Y/Y (%)	Percentage (%)
Total manufacturers	121,942	1.0	100.0	120,533	-1.2	100.0
09 Food	18,028	5.2	14.8	17,737	-1.6	14.7
10 Beverages, tobacco and feed	2,346	3.0	1.9	2,334	-0.5	1.9
11 Textile mill products	7,525	2.2	6.2	7,278	-3.3	6.0
12 Lumber and wood products	2,700	1.5	2.2	2,654	-1.7	2.2
13 Furniture and fixtures	2,184	0.9	1.8	2,182	-0.1	1.8
14 Pulp, paper and paper products	3,917	0.3	3.2	3,844	-1.9	3.2
15 Printing and allied industries	6,206	-2.6	5.1	6,078	-2.1	5.0
16 Chemical and allied products	3,797	1.1	3.1	3,788	-0.2	3.1
17 Petroleum and coal products	421	4.7	0.3	411	-2.4	0.3
18 Plastic products	8,517	3.2	7.0	8,393	-1.5	7.0
19 Rubber products	1,623	3.3	1.3	1,626	0.2	1.3
20 Leather tanning, leather products and fur skins	639	-1.5	0.5	675	5.6	0.6
21 Ceramic, stone and clay products	6,132	2.4	5.0	6,122	-0.2	5.1
22 Iron and steel	3,027	1.8	2.5	2,963	-2.1	2.5
23 Non-ferrous metals and products	1,807	-1.0	1.5	1,764	-2.4	1.5
24 Fabricated metal products	14,088	2.5	11.6	14,132	0.3	11.7
25 General-purpose machinery	4,234	5.3	3.5	4,172	-1.5	3.5
26 Production machinery	10,413	-1.8	8.5	10,398	-0.1	8.6
27 Business oriented machinery	2,726	-0.8	2.2	2,725	0.0	2.3
28 Electronic parts, devices and electronic circuits	3,389	-8.6	2.8	3,296	-2.7	2.7
29 Electrical machinery, equipment and supplies	6,164	-1.2	5.1	6,139	-0.4	5.1
30 Information and communication electronics equipment	1,351	-6.7	1.1	1,250	-7.5	1.0
31 Transportation equipment	7,479	-2.1	6.1	7,350	-1.7	6.1
32 Miscellaneous manufacturing industries	3,229	-1.4	2.6	3,222	-0.2	2.7

② Observing the composition of the number of establishments by industry, “Manufacture of food” accounts for the largest percentage of manufacturing establishments (17,737 manufacturing establishments or composition ratio of 14.7%), followed by “Manufacture of fabricated metal products” (14,132 manufacturing establishments or 11.7% id.), “Manufacture of production machinery” (10,398 manufacturing establishments or 8.6% id.), “Manufacture of plastic products, except otherwise classified” (8,393 manufacturing establishments or 7.0% id.), “Manufacture of transportation equipment” (7,350 manufacturing establishments or 6.1% id.), suggesting that these five industrial sectors occupy almost 50% of the total. Then, the list continues in descending order with “Manufacture of textile mill products” (6.0% id.), “Manufacture of electrical machinery, equipment and supplies” (5.1% id.), “Manufacture of ceramic, stone and clay products” (5.1% id.), “Printing and allied industries” (5.0% id.) and “Manufacture of general-purpose machinery” (3.5% id.) (Table 2, Figure 3).

Figure 3: Breakdown of Number of Establishments by Industry (Establishments with 10 or more employees)



**(2) Number of persons employed: The number of persons employed increases for two consecutive years.**

The number of persons employed is 6,868,748 persons, up 0.2% from the preceding year, showing an increase for two consecutive years (Table 1, Figure 1).

① Observing the number of persons employed for 24 industry sectors on the year-on-year comparison basis (in order of the contribution degree), the number of persons employed has increased in 13 industry sectors out of the total 24. These industry sectors include “Manufacture of transportation equipment” (up 2.5% from the preceding year), “Manufacture of food” (up 1.6% id.) and “Manufacture of electrical machinery, equipment and supplies” (up 1.2% id.). On the other hand, 11 industry sectors see decreased employees, such as “Manufacture of information and communication electronics equipment” (down 9.3% id.), “Manufacture of textile mill products” (down 2.3% id.), “Electronic parts, devices and electronic circuits” (down 1.4% id.) (Table 3, Figure 4).

Figure 4: Year-on-Year Comparison of Number of Persons Employed by Industry  
(Establishments with 10 or more employees)

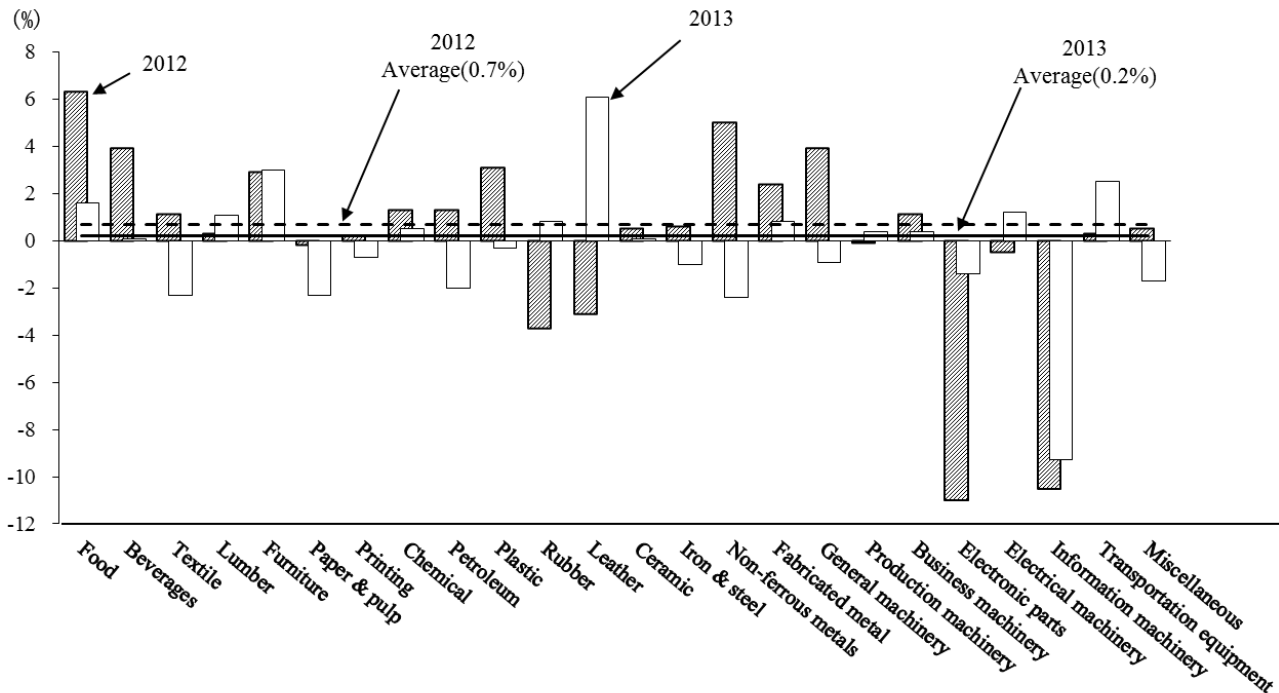
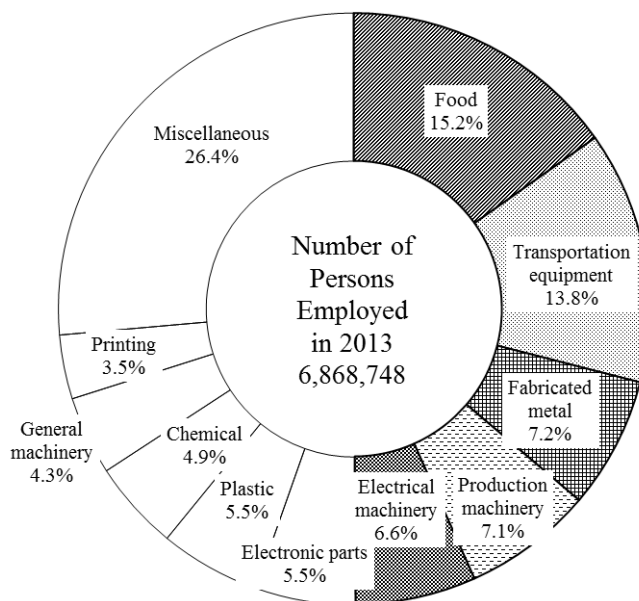


Table 3: Number of Persons Employed by Industry  
(Establishments with 10 or more employees)

Industry	Item	Number of persons employed					
		2012			2013		
		Actual count (persons)	Y/Y (%)	Percentage (%)	Actual count (persons)	Y/Y (%)	Percentage (%)
Total manufacturers		6,854,404	0.7	100.0	6,868,748	0.2	100.0
09 Food		1,025,835	6.3	15.0	1,042,322	1.6	15.2
10 Beverages, tobacco and feed		88,444	3.9	1.3	88,533	0.1	1.3
11 Textile mill products		241,103	1.1	3.5	235,524	-2.3	3.4
12 Lumber and wood products		73,662	0.3	1.1	74,482	1.1	1.1
13 Furniture and fixtures		74,376	2.9	1.1	76,624	3.0	1.1
14 Pulp, paper and paper products		171,517	-0.2	2.5	167,580	-2.3	2.4
15 Printing and allied industries		242,233	0.2	3.5	240,503	-0.7	3.5
16 Chemical and allied products		332,024	1.3	4.8	333,815	0.5	4.9
17 Petroleum and coal products		21,697	1.3	0.3	21,258	-2.0	0.3
18 Plastic products		380,273	3.1	5.5	379,116	-0.3	5.5
19 Rubber products		105,096	-3.7	1.5	105,915	0.8	1.5
20 Leather tanning, leather products and fur skins		17,299	-3.1	0.3	18,349	6.1	0.3
21 Ceramic, stone and clay products		214,550	0.5	3.1	214,709	0.1	3.1
22 Iron and steel		209,612	0.6	3.1	207,442	-1.0	3.0
23 Non-ferrous metals and products		135,236	5.0	2.0	131,972	-2.4	1.9
24 Fabricated metal products		488,968	2.4	7.1	492,963	0.8	7.2
25 General-purpose machinery		299,834	3.9	4.4	297,249	-0.9	4.3
26 Production machinery		486,682	-0.1	7.1	488,838	0.4	7.1
27 Business oriented machinery		192,150	1.1	2.8	192,966	0.4	2.8
28 Electronic parts, devices and electronic circuits		386,244	-11.0	5.6	380,936	-1.4	5.5
29 Electrical machinery, equipment and supplies		448,259	-0.5	6.5	453,678	1.2	6.6
30 Information and communication electronics equipment		171,245	-10.5	2.5	155,251	-9.3	2.3
31 Transportation equipment		923,243	0.3	13.5	946,053	2.5	13.8
32 Miscellaneous manufacturing industries		124,822	0.5	1.8	122,670	-1.7	1.8

② Observing the composition ratio of the number of persons employed by industry, “Manufacture of food” accounts for the largest number of persons employed (1,042,322 persons or 15.2% of the total), followed by “Manufacture of transportation equipment” (946,053 persons or 13.8% id.), “Manufacture of fabricated metal products” (492,963 persons or 7.2% id.), “Manufacture of production machinery” (488,838 persons or 7.1% id.) and “Manufacture of electrical machinery, equipment and supplies” (453,678 persons or 6.6% id.). These five industry sectors account for almost 50% of the total. Then, the list continues in descending order with “Electronic parts, devices and electronic circuits” (5.5% id.), “Manufacture of plastic products, except otherwise classified” (5.5% id.), “Manufacture of chemical and allied products” (4.9% id.), “Manufacture of general-purpose machinery” (4.3% id.), “Printing and allied industries” (3.5% id.) (Table 3, Figure 5).

Figure 5: Breakdown of the Number of Persons Employed by Industry (Establishments with 10 or more employees)



**(3) Value of manufactured goods shipments: The value of manufactured goods shipments has increased for two consecutive years-**

The value of manufactured goods shipments is 285.2742 trillion yen, up 1.3% from the preceding year, rising for two consecutive years (Table 1, Figure 1).

① When looking at the value of manufactured goods shipments for 24 industry sectors on the year-on-year comparison basis (in order of the contribution degree), the value of manufactured goods shipments has increased in 11 industry sectors out of the total 24. These industry sectors include “Manufacture of transportation equipment” (up 3.1% from the preceding year), “Manufacture of chemical and allied products” (up 5.2% id.) and “Manufacture of food” (up 2.8% id.). On the other hand, it has decreased in 13 industry sectors, such as “Electronic parts, devices and electronic circuits” (down 2.9% id.), “Manufacture of general-purpose machinery” (down 3.6% id.) and “Manufacture of production machinery” (down 2.2% id.) (Table 4, Figure 6).

Figure 6: Year-on-Year Comparison of Value of Manufactured Goods Shipments by Industry  
(Establishments with 10 or more employees)

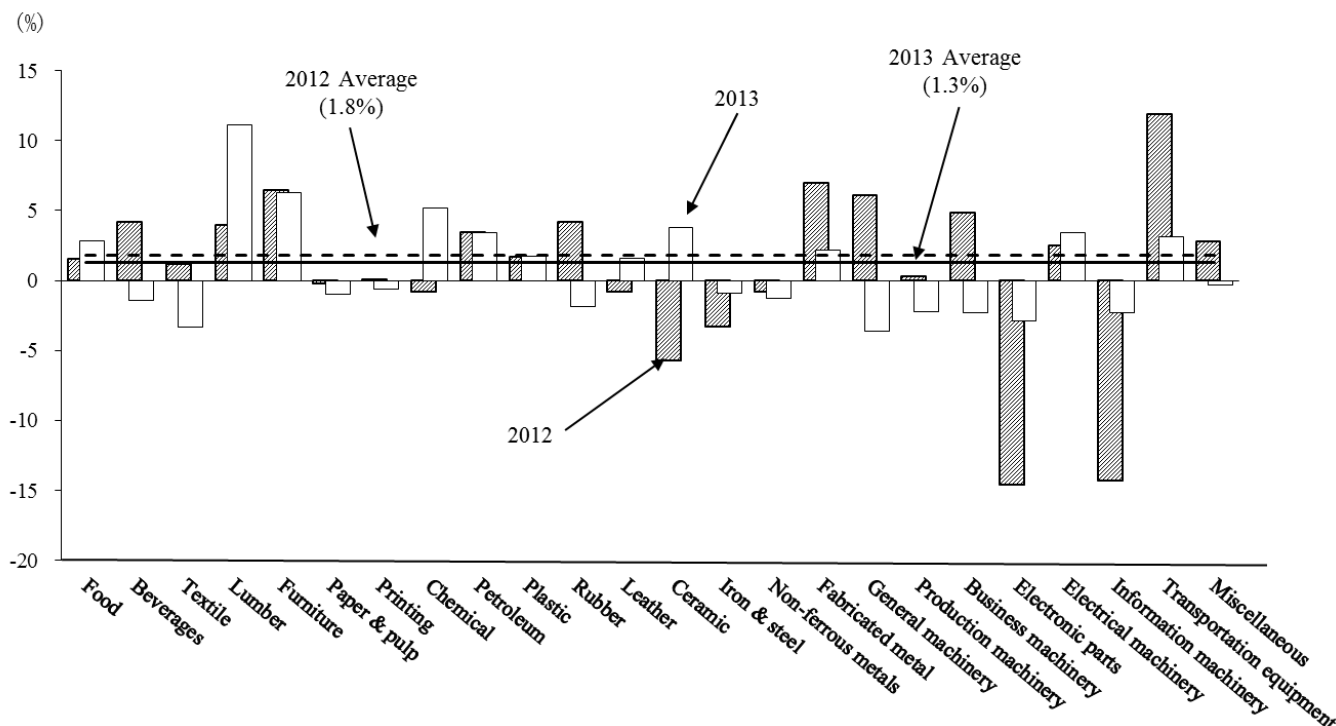
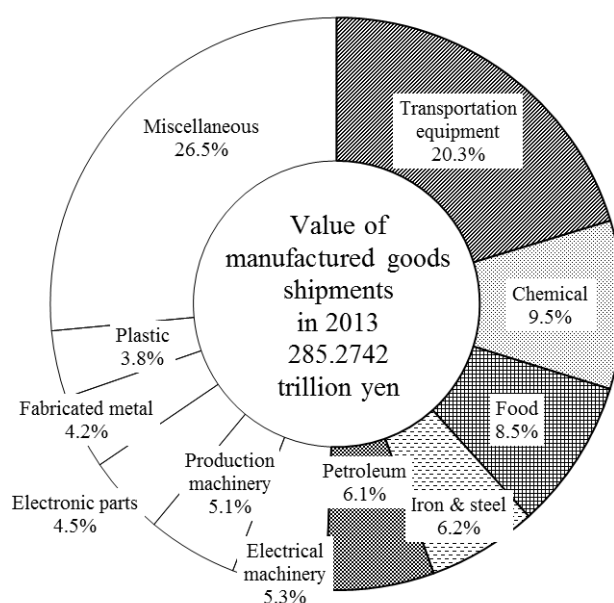


Table 4: Value of Manufactured Goods Shipments by Industry  
(Establishments with 10 or more employees)

Industry	Item	Value of manufactured goods shipments					
		2012			2013		
		Value (million yen)	Y/Y (%)	Percentage (%)	Value (million yen)	Y/Y (%)	Percentage (%)
Total manufacturers		281,598,314	1.8	100.0	285,274,155	1.3	100.0
09 Food		23,670,882	1.6	8.4	24,337,473	2.8	8.5
10 Beverages, tobacco and feed		9,420,516	4.2	3.3	9,288,674	-1.4	3.3
11 Textile mill products		3,552,146	1.2	1.3	3,434,074	-3.3	1.2
12 Lumber and wood products		1,978,490	4.0	0.7	2,198,539	11.1	0.8
13 Furniture and fixtures		1,519,099	6.5	0.5	1,615,350	6.3	0.6
14 Pulp, paper and paper products		6,651,855	-0.2	2.4	6,588,523	-1.0	2.3
15 Printing and allied industries		5,104,802	0.1	1.8	5,074,682	-0.6	1.8
16 Chemical and allied products		25,861,485	-0.8	9.2	27,198,657	5.2	9.5
17 Petroleum and coal products		16,849,302	3.5	6.0	17,425,149	3.4	6.1
18 Plastic products		10,655,943	1.7	3.8	10,837,917	1.7	3.8
19 Rubber products		3,109,191	4.2	1.1	3,048,595	-1.9	1.1
20 Leather tanning, leather products and fur skins		293,903	-0.8	0.1	298,667	1.6	0.1
21 Ceramic, stone and clay products		6,260,259	-5.7	2.2	6,498,966	3.8	2.3
22 Iron and steel		17,761,767	-3.3	6.3	17,601,881	-0.9	6.2
23 Non-ferrous metals and products		8,822,292	-0.8	3.1	8,709,353	-1.3	3.1
24 Fabricated metal products		11,849,437	7.0	4.2	12,106,391	2.2	4.2
25 General-purpose machinery		10,365,179	6.1	3.7	9,994,805	-3.6	3.5
26 Production machinery		14,831,404	0.3	5.3	14,502,416	-2.2	5.1
27 Business oriented machinery		6,713,401	4.9	2.4	6,558,614	-2.3	2.3
28 Electronic parts, devices and electronic circuits		13,259,018	-14.6	4.7	12,875,981	-2.9	4.5
29 Electrical machinery, equipment and supplies		14,751,659	2.5	5.2	15,247,565	3.4	5.3
30 Information and communication electronics equipment		8,598,296	-14.3	3.1	8,399,050	-2.3	2.9
31 Transportation equipment		56,253,394	11.9	20.0	57,979,588	3.1	20.3
32 Miscellaneous manufacturing industries		3,464,594	2.8	1.2	3,453,248	-0.3	1.2

② Observing the composition ratio of the value of manufactured goods shipments by industry, “Manufacture of transportation equipment” records the largest value of manufactured goods shipments at over 20% composition (57.9796 trillion yen or 20.3% of the total), followed by “Manufacture of chemical and allied products” (27.1987 trillion yen or 9.5% id.), “Manufacture of food” (24.3375 trillion yen or 8.5% id.), “Manufacture of iron and steel” (17.6019 trillion yen or 6.2% id.) and “Manufacture of petroleum and coal products” (17.4251 trillion yen or 6.1% id.).

Figure 7: Breakdown of Manufactured Goods Shipments Value by Industry (Establishments with 10 or more employees)



These five industry sectors account for approximately 50% of the total. Then, the list continues in descending order with “Manufacture of electrical machinery, equipment and supplies” (5.3% id.), “Manufacture of production machinery” (5.1% id.), “Electronic parts, devices and electronic circuits” (4.5% id.), “Manufacture of fabricated metal products” (4.2% id.) and “Manufacture of plastic products, except otherwise classified” (3.8% id.) (Table 4, Figure 7).

**(4) Value added (Gross value added for manufacturing establishments with 29 or less employees) — The value added increases for the first time in three years.**

The value added is 87.0264 trillion yen, up 2.3% from the preceding year, rising for the first time in three years. (Table 1, Figure 1)

① When looking at the value added for 24 industry sectors on the year-on-year comparison basis (in order of the contribution degree), value added has increased in 13 industry sectors out of the total 24. These industry sectors include “Manufacture of transportation equipment” (up 5.4% from the preceding year), “Manufacture of chemical and allied products” (up 4.3% id.) and “Manufacture of iron and steel” (up 13.8% id.). On the other hand, it has decreased in 11 industry sectors, such as “Manufacture of beverages, tobacco and feed” (down 5.8% id.), “Manufacture of production machinery” (down 1.9% id.) and “Manufacture of textile mill products” (down 4.9% id.) (Table 5, Figure 8).



Figure 8: Year-on-Year Comparison of Value Added by Industry  
(Establishments with 10 or more employees)

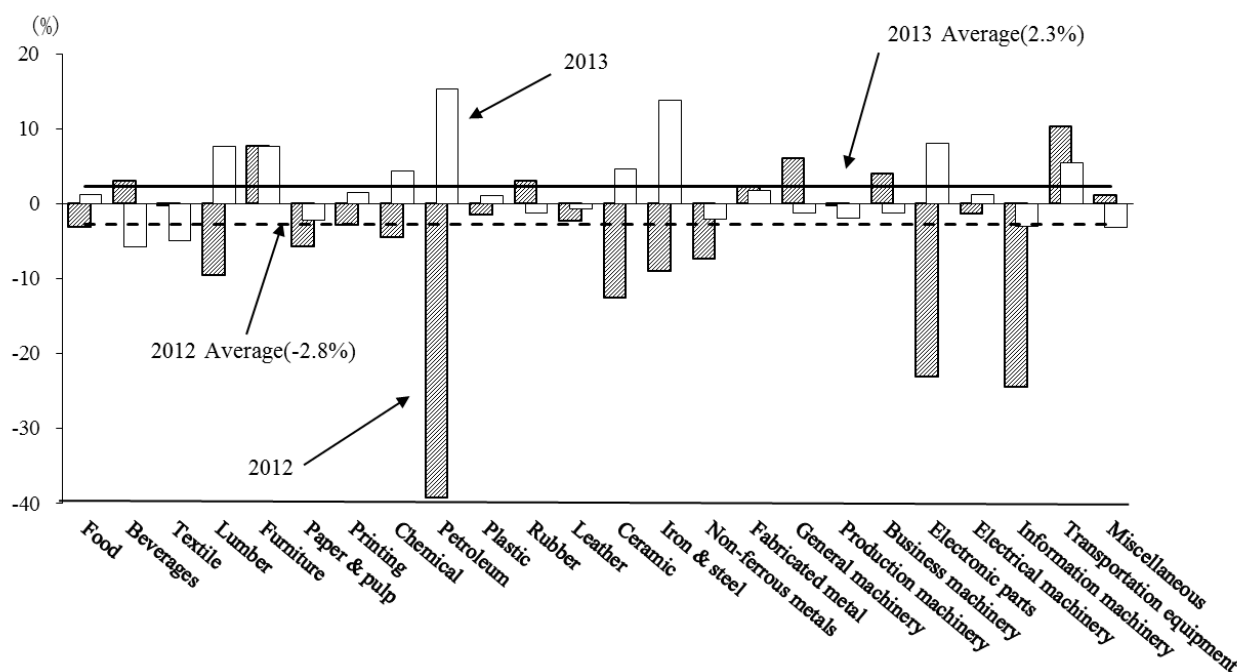


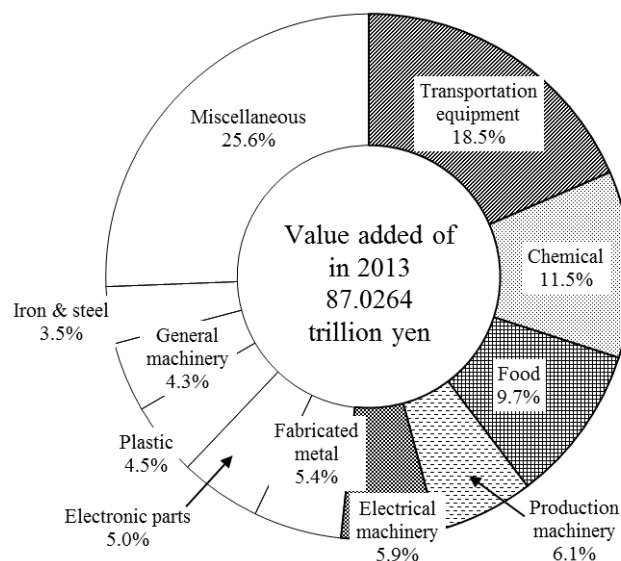
Table 5: Value Added by Industry  
(Establishments with 10 or more employees)

Industry	Item	Value added					
		2012			2013		
		Value (million yen)	Y/Y (%)	Percentage (%)	Value (million yen)	Y/Y (%)	Percentage (%)
Total manufacturers		85,031,960	-2.8	100.0	87,026,379	2.3	100.0
09 Food		8,299,049	-3.1	9.8	8,398,170	1.2	9.7
10 Beverages, tobacco and feed		2,738,694	3.0	3.2	2,579,452	-5.8	3.0
11 Textile mill products		1,383,459	-0.3	1.6	1,315,409	-4.9	1.5
12 Lumber and wood products		611,963	-9.5	0.7	658,699	7.6	0.8
13 Furniture and fixtures		538,238	7.7	0.6	579,373	7.6	0.7
14 Pulp, paper and paper products		2,055,256	-5.7	2.4	2,009,494	-2.2	2.3
15 Printing and allied industries		2,201,508	-2.9	2.6	2,235,252	1.5	2.6
16 Chemical and allied products		9,633,933	-4.5	11.3	10,050,132	4.3	11.5
17 Petroleum and coal products		961,498	-39.2	1.1	1,108,509	15.3	1.3
18 Plastic products		3,869,999	-1.5	4.6	3,913,942	1.1	4.5
19 Rubber products		1,245,370	3.1	1.5	1,229,284	-1.3	1.4
20 Leather tanning, leather products and fur skins		107,598	-2.3	0.1	106,872	-0.7	0.1
21 Ceramic, stone and clay products		2,536,518	-12.5	3.0	2,652,477	4.6	3.0
22 Iron and steel		2,706,720	-9.0	3.2	3,079,367	13.8	3.5
23 Non-ferrous metals and products		1,876,779	-7.3	2.2	1,838,155	-2.1	2.1
24 Fabricated metal products		4,605,670	2.2	5.4	4,687,622	1.8	5.4
25 General-purpose machinery		3,810,267	6.1	4.5	3,765,612	-1.2	4.3
26 Production machinery		5,400,082	-0.3	6.4	5,299,623	-1.9	6.1
27 Business oriented machinery		2,579,581	4.0	3.0	2,546,641	-1.3	2.9
28 Electronic parts, devices and electronic circuits		4,056,200	-23.1	4.8	4,386,399	8.1	5.0
29 Electrical machinery, equipment and supplies		5,047,474	-1.3	5.9	5,106,237	1.2	5.9
30 Information and communication electronics equipment		2,123,267	-24.4	2.5	2,057,976	-3.1	2.4
31 Transportation equipment		15,317,865	10.3	18.0	16,139,513	5.4	18.5
32 Miscellaneous manufacturing industries		1,324,972	1.1	1.6	1,282,170	-3.2	1.5

Note: The value added data on establishments with 10-29 employees represent gross value added.

② Observing the composition ratio of the value added by industry, “Manufacture of transportation equipment” records the largest value added (16.1395 trillion yen or 18.5% of the total), followed by “Manufacture of chemical and allied products” (10.0501 trillion yen or 11.5% id.), “Manufacture of food” (8.3982 trillion yen or 9.7% id.), “Manufacture of production machinery” (5.2996 trillion yen or 6.1% id.) and “Manufacture of

Figure 9: Breakdown of Value Added by Industry (Establishments with 10 or more employees)



electrical machinery, equipment and supplies” (5.1062 trillion yen or 5.9% id.). These five industry sectors account for over 50% of the total. Then, the list continues in descending order with “Manufacture of fabricated metal products” (5.4% id.), “Electronic parts, devices and electronic circuits” (5.0% id.), “Manufacture of plastic products, except otherwise classified” (4.5% id.), “Manufacture of general-purpose machinery” (4.3% id.) and “Manufacture of iron and steel” (3.5% id.) (Table 5, Figure 9).