

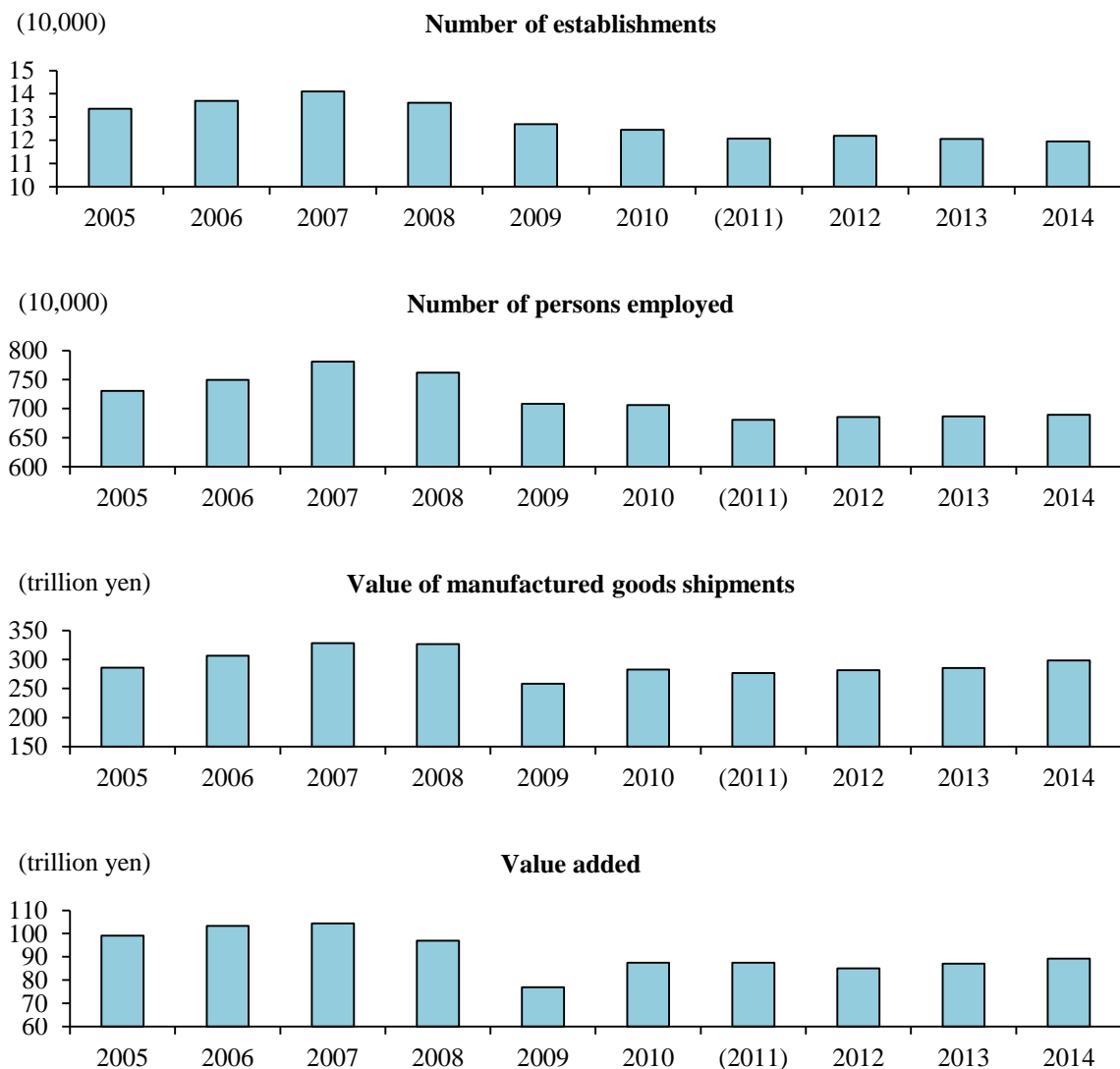
# Summary

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

— The number of establishments decreased for two consecutive years, while the number of persons employed and the value of manufactured goods shipments increased for three consecutive years, and the value added increased for two consecutive years. —

The number of establishments with 10 or more employees in 2014 was 119,484 (down 0.9% from the preceding year), showing a decrease for two consecutive years. The number of persons employed was 6,893,550 (up 0.4% id.) and the value of manufactured goods shipments was 298.2878 trillion yen (up 4.6% id.), both showing an increase for three consecutive years. Meanwhile, the value added was 89.2080 trillion yen (up 2.5% id.), showing an increase for two consecutive years (Table 1, Figure 1).

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



Note: Survey for 2011 was conducted in the Economic Census for Business Activity.

**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	
		(persons)	Y/Y (%)	(persons)	Y/Y (%)	(100 million yen)	Y/Y (%)	(100 million yen)	Y/Y (%)
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
2014		119,484	-0.9	6,893,550	0.4	2,982,878	4.6	892,080	2.5

Note:

1. The value added data on establishments with 10-29 employees represent gross value added.
2. As additional 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 these establishments additionally surveyed.
3. Due to changes in survey items, the value of manufactured goods shipments and value added for 2007 do not connect to those for 2006 and earlier.
4. As Japan Standard Industry Classification (JSIC) was revised in 2008, 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.

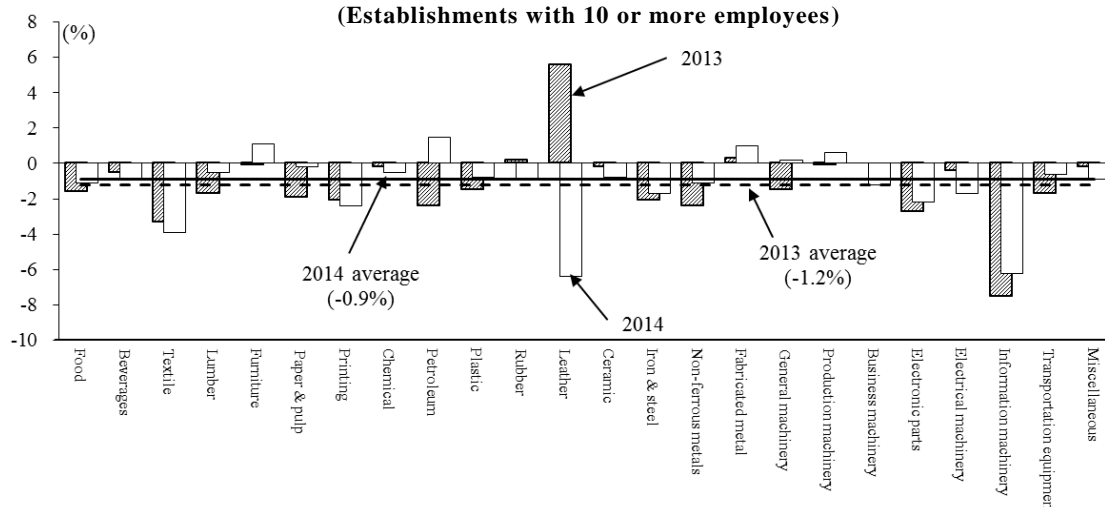
## 2. Situation by industry (Establishments with 10 or more employees)

### (1) Number of establishments: The number of establishments decreased for two consecutive years.

The number of establishments was 119,484 (down 0.9% from the preceding year), showing a decrease for two consecutive years (Table 1, Figure 1).

(i) Observing the number of establishments for 24 industry sectors on the year-on-year comparison basis (in order of the contribution degree\*), the number of establishments decreased in 19 industry sectors. These industry sectors include "Textile products" (down 3.9% from the preceding year), "Manufacture of food" (down 1.1% id.), and "Printing and allied industries" (down 2.4% id.). On the other hand, the number of establishments increased in 5 industry sectors, including "Manufacture of fabricated metal products" (up 1.0% id.), "Manufacture of production machinery" (up 0.6% id.), and "Manufacture of furniture and fixtures" (up 1.1% id.) (Table 2, Figure 2).

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



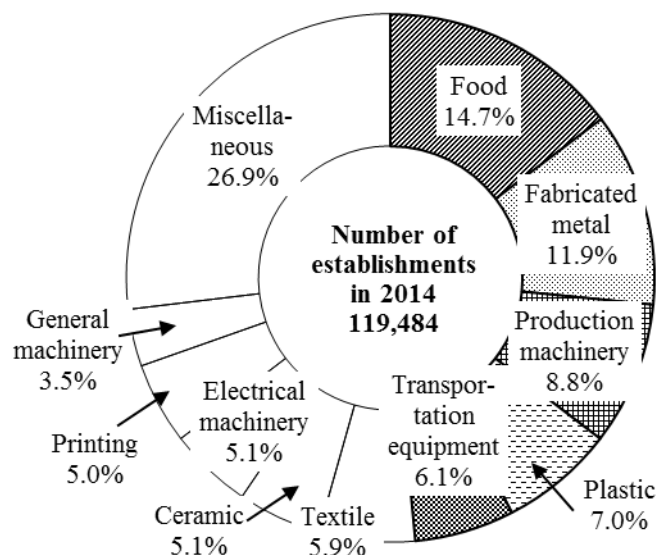
\* Industries exemplified for year-on-year changes in the text are listed in order of the contribution degree (excluding per establishment/per employee as well as by prefecture). Contribution degree indicates how much a change in each factor will contribute to overall changes (growth rate) and is expressed as follows: Contribution degree of Industry A = Year-on-year increase/decrease rate of Industry A × Percentage occupied by Industry A in the manufacturing industry in the preceding year.

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

Item	Number of establishments					
	2013			2014		
	Actual count	Y/Y (%)	Percentage (%)	Actual count	Y/Y (%)	Percentage (%)
Industry						
Total manufacturers	120,533	-1.2	100.0	119,484	-0.9	100.0
09 Food	17,737	-1.6	14.7	17,534	-1.1	14.7
10 Beverages, tobacco and feed	2,334	-0.5	1.9	2,314	-0.9	1.9
11 Textile products	7,278	-3.3	6.0	6,994	-3.9	5.9
12 Lumber and wood products	2,654	-1.7	2.2	2,640	-0.5	2.2
13 Furniture and fixtures	2,182	-0.1	1.8	2,205	1.1	1.8
14 Pulp, paper and paper products	3,844	-1.9	3.2	3,836	-0.2	3.2
15 Printing and allied industries	6,078	-2.1	5.0	5,934	-2.4	5.0
16 Chemical and allied products	3,788	-0.2	3.1	3,769	-0.5	3.2
17 Petroleum and coal products	411	-2.4	0.3	417	1.5	0.3
18 Plastic products	8,393	-1.5	7.0	8,330	-0.8	7.0
19 Rubber products	1,626	0.2	1.3	1,612	-0.9	1.3
20 Leather tanning, leather products and fur skins	675	5.6	0.6	632	-6.4	0.5
21 Ceramic, stone and clay products	6,122	-0.2	5.1	6,074	-0.8	5.1
22 Iron and steel	2,963	-2.1	2.5	2,912	-1.7	2.4
23 Non-ferrous metals and products	1,764	-2.4	1.5	1,745	-1.1	1.5
24 Fabricated metal products	14,132	0.3	11.7	14,267	1.0	11.9
25 General-purpose machinery	4,172	-1.5	3.5	4,182	0.2	3.5
26 Production machinery	10,398	-0.1	8.6	10,465	0.6	8.8
27 Business oriented machinery	2,725	0.0	2.3	2,693	-1.2	2.3
28 Electronic parts, devices and electronic circuits	3,296	-2.7	2.7	3,223	-2.2	2.7
29 Electrical machinery, equipment and supplies	6,139	-0.4	5.1	6,036	-1.7	5.1
30 Information and communication electronics equipment	1,250	-7.5	1.0	1,173	-6.2	1.0
31 Transportation equipment	7,350	-1.7	6.1	7,304	-0.6	6.1
32 Miscellaneous manufacturing industries	3,222	-0.2	2.7	3,193	-0.9	2.7

(ii) Observing the composition ratio of the number of establishments by industry, "Manufacture of food" accounted for the largest percentage of manufacturing establishments (17,534 manufacturing establishments or composition ratio of 14.7%), followed by "Manufacture of fabricated metal products" (14,267 manufacturing establishments or 11.9% id.), "Manufacture of production machinery" (10,465 manufacturing establishments or 8.8% id.), "Manufacture of plastic products, except otherwise classified" (8,330 manufacturing establishments or 7.0% id.), "Manufacture of transportation equipment" (7,304 manufacturing establishments or 6.1% id.), suggesting that these five industrial sectors occupied almost 50% of the total. Then, the list continues in descending order with "Manufacture of textile products" (5.9% id.), "Manufacture of ceramic, stone and clay products" (5.1% id.), "Manufacture of electrical machinery, equipment and supplies" (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)**

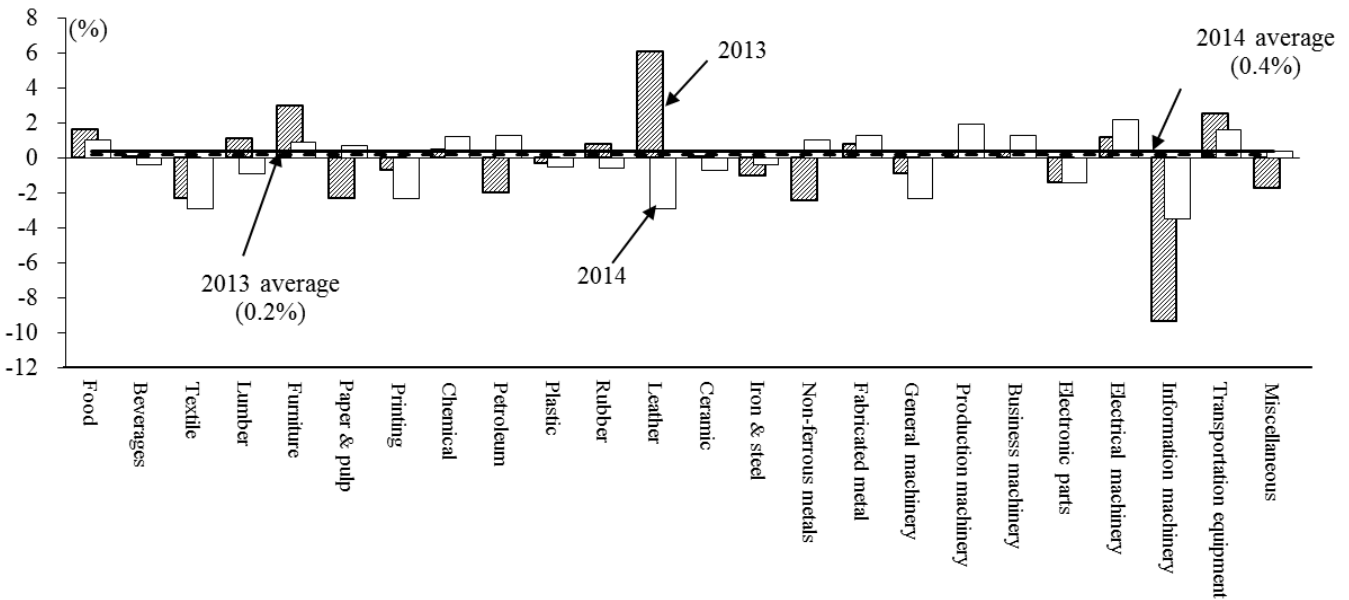


**(2) Number of persons employed: The number of persons employed increased for three consecutive years.**

The number of persons employed was 6,893,550 persons, up 0.4% from the preceding year, showing an increase for three consecutive years (Table 1, Figure 1).

(i) 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 increased in 12 industry sectors. These industry sectors include "Manufacture of transportation equipment" (up 1.6% from the preceding year), "Manufacture of food" (up 1.0% id.) and "Manufacture of electrical machinery, equipment and supplies" (up 2.2% id.). On the other hand, 12 industry sectors saw decreased employees, such as "Manufacture of textile mill products" (down 2.9% id.), "Manufacture of general-purpose machinery" (down 2.3%), and "Manufacture of information and communication electronics equipment" (down 3.5% id.) (Table 3, Figure 4).

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

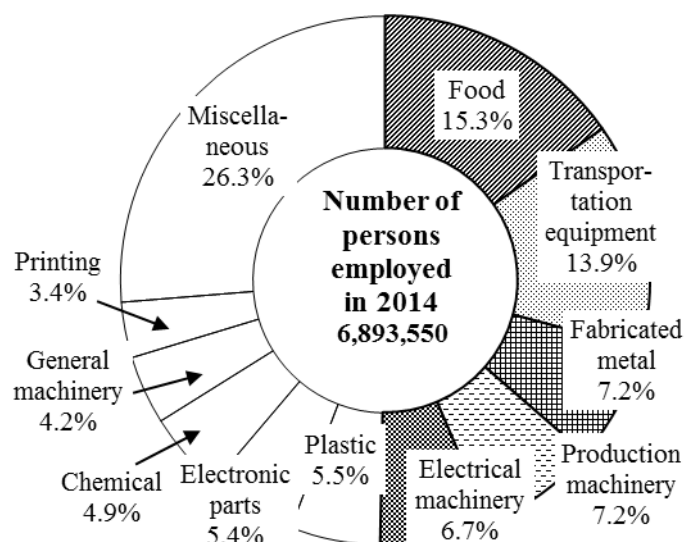


**Table 3: Number of Persons Employed by Industry**  
(Establishments with 10 or more employees)

Item Industry	Number of persons employed					
	2013			2014		
	Actual count (persons)	Y/Y (%)	Percentage (%)	Actual count (persons)	Y/Y (%)	Percentage (%)
Total manufacturers	6,868,748	0.2	100.0	6,893,550	0.4	100.0
09 Food	1,042,322	1.6	15.2	1,052,436	1.0	15.3
10 Beverages, tobacco and feed	88,533	0.1	1.3	88,135	-0.4	1.3
11 Textile products	235,524	-2.3	3.4	228,580	-2.9	3.3
12 Lumber and wood products	74,482	1.1	1.1	73,848	-0.9	1.1
13 Furniture and fixtures	76,624	3.0	1.1	77,280	0.9	1.1
14 Pulp, paper and paper products	167,580	-2.3	2.4	168,697	0.7	2.4
15 Printing and allied industries	240,503	-0.7	3.5	235,022	-2.3	3.4
16 Chemical and allied products	333,815	0.5	4.9	337,703	1.2	4.9
17 Petroleum and coal products	21,258	-2.0	0.3	21,527	1.3	0.3
18 Plastic products	379,116	-0.3	5.5	377,398	-0.5	5.5
19 Rubber products	105,915	0.8	1.5	105,283	-0.6	1.5
20 Leather tanning, leather products and fur skins	18,349	6.1	0.3	17,811	-2.9	0.3
21 Ceramic, stone and clay products	214,709	0.1	3.1	213,148	-0.7	3.1
22 Iron and steel	207,442	-1.0	3.0	206,636	-0.4	3.0
23 Non-ferrous metals and products	131,972	-2.4	1.9	133,345	1.0	1.9
24 Fabricated metal products	492,963	0.8	7.2	499,487	1.3	7.2
25 General-purpose machinery	297,249	-0.9	4.3	290,520	-2.3	4.2
26 Production machinery	488,838	0.4	7.1	498,227	1.9	7.2
27 Business oriented machinery	192,966	0.4	2.8	195,457	1.3	2.8
28 Electronic parts, devices and electronic circuits	380,936	-1.4	5.5	375,462	-1.4	5.4
29 Electrical machinery, equipment and supplies	453,678	1.2	6.6	463,711	2.2	6.7
30 Information and communication electronics equipment	155,251	-9.3	2.3	149,745	-3.5	2.2
31 Transportation equipment	946,053	2.5	13.8	960,897	1.6	13.9
32 Miscellaneous manufacturing industries	122,670	-1.7	1.8	123,195	0.4	1.8

(ii) Observing the composition ratio of the number of persons employed by industry, "Manufacture of food" accounted for the largest number of persons employed (1,052,436 persons or 15.3% of the total), followed by "Manufacture of transportation equipment" (960,897 persons or 13.9% id.), "Manufacture of fabricated metal products" (499,487 persons or 7.2% id.), "Manufacture of production machinery" (498,227 persons or 7.2% id.) and "Manufacture of electrical machinery, equipment and supplies" (463,711 persons or 6.7% id.). These five industry sectors accounted for over 50% of the total. Then, the list continues in descending order with "Manufacture of plastic products, except otherwise classified" (5.5% id.), "Manufacture of electronic parts, devices and electronic circuits" (5.4% id.), "Manufacture of chemical and allied products" (4.9% id.), "Manufacture of general-purpose machinery" (4.2% id.), and "Printing and allied industries" (3.4% id.) (Table 3, Figure 5).

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

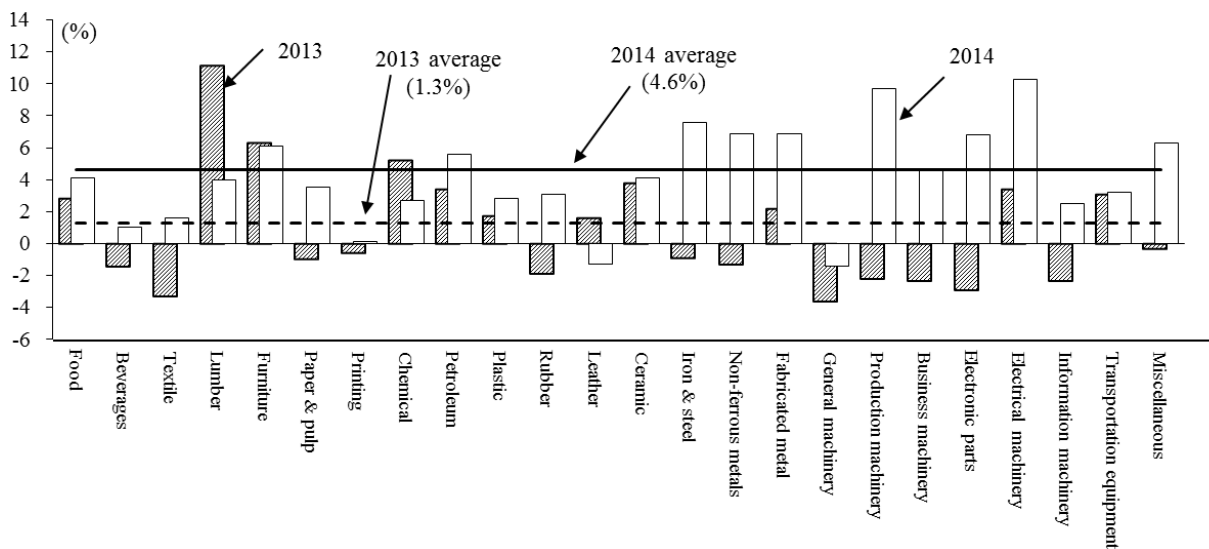


**(3) Value of manufactured goods shipments: The value of manufactured goods shipments increased for three consecutive years.**

The value of manufactured goods shipments was 298.2878 trillion yen, up 4.6% from the preceding year, rising for three consecutive years (Table 1, Figure 1).

(i) 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 increased in 22 industry sectors. These industry sectors include "Manufacture of transportation equipment" (up 3.2% from the preceding year), "Manufacture of electrical machinery, equipment and supplies" (up 10.3%), and "Manufacture of production machinery" (up 9.7% id.). On the other hand, the value decreased in 2 industry sectors, namely "Manufacture of general-purpose machinery" (down 1.4% id.) and "Manufacture of leather tanning, leather products and fur skins" (down 1.3% 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)**

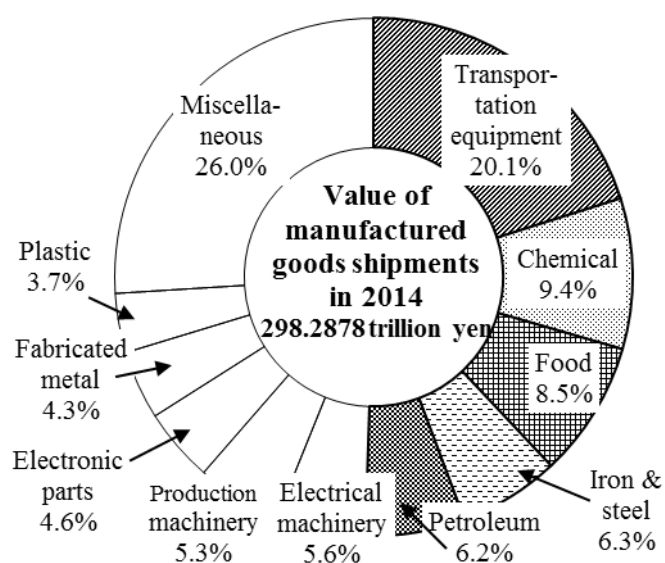


**Table 4: Value of Manufactured Goods Shipments by Industry**  
(Establishments with 10 or more employees)

Item Industry	Value of manufactured goods shipments					
	2013			2014		
	Value (million yen)	Y/Y (%)	Percentage (%)	Value (million yen)	Y/Y (%)	Percentage (%)
Total manufacturers	285,274,155	1.3	100.0	298,287,799	4.6	100.0
09 Food	24,337,473	2.8	8.5	25,345,282	4.1	8.5
10 Beverages, tobacco and feed	9,288,674	-1.4	3.3	9,377,122	1.0	3.1
11 Textile products	3,434,074	-3.3	1.2	3,490,029	1.6	1.2
12 Lumber and wood products	2,198,539	11.1	0.8	2,287,001	4.0	0.8
13 Furniture and fixtures	1,615,350	6.3	0.6	1,713,462	6.1	0.6
14 Pulp, paper and paper products	6,588,523	-1.0	2.3	6,821,637	3.5	2.3
15 Printing and allied industries	5,074,682	-0.6	1.8	5,080,706	0.1	1.7
16 Chemical and allied products	27,198,657	5.2	9.5	27,938,577	2.7	9.4
17 Petroleum and coal products	17,425,149	3.4	6.1	18,398,160	5.6	6.2
18 Plastic products	10,837,917	1.7	3.8	11,143,025	2.8	3.7
19 Rubber products	3,048,595	-1.9	1.1	3,144,041	3.1	1.1
20 Leather tanning, leather products and fur skins	298,667	1.6	0.1	294,811	-1.3	0.1
21 Ceramic, stone and clay products	6,498,966	3.8	2.3	6,764,592	4.1	2.3
22 Iron and steel	17,601,881	-0.9	6.2	18,933,816	7.6	6.3
23 Non-ferrous metals and products	8,709,353	-1.3	3.1	9,312,897	6.9	3.1
24 Fabricated metal products	12,106,391	2.2	4.2	12,940,331	6.9	4.3
25 General-purpose machinery	9,994,805	-3.6	3.5	9,850,307	-1.4	3.3
26 Production machinery	14,502,416	-2.2	5.1	15,910,705	9.7	5.3
27 Business oriented machinery	6,558,614	-2.3	2.3	6,866,305	4.7	2.3
28 Electronic parts, devices and electronic circuits	12,875,981	-2.9	4.5	13,746,946	6.8	4.6
29 Electrical machinery, equipment and supplies	15,247,565	3.4	5.3	16,815,415	10.3	5.6
30 Information and communication electronics equipment	8,399,050	-2.3	2.9	8,606,610	2.5	2.9
31 Transportation equipment	57,979,588	3.1	20.3	59,836,456	3.2	20.1
32 Miscellaneous manufacturing industries	3,453,248	-0.3	1.2	3,669,566	6.3	1.2

(ii) Observing the composition ratio of the value of manufactured goods shipments by industry, "Manufacture of transportation equipment" recorded the largest value of manufactured goods shipments at over 20% composition (59.8365 trillion yen or 20.1% of the total), followed by "Manufacture of chemical and allied products" (27.9386 trillion yen or 9.4% id.), "Manufacture of food" (25.3453 trillion yen or 8.5% id.), "Manufacture of iron and steel" (18.9338 trillion yen or 6.3% id.) and "Manufacture of petroleum and coal products" (18.3982 trillion yen or 6.2% id.). These five industry sectors accounted for approximately 50% of the total. Then, the list continues in descending order with "Manufacture of electrical machinery, equipment and supplies" (5.6% id.), "Manufacture of production machinery" (5.3% id.), "Manufacture of electronic parts, devices and electronic circuits" (4.6% id.), "Manufacture of fabricated metal products" (4.3% id.), and "Manufacture of plastic products, except otherwise classified" (3.7% id.) (Table 4, Figure 7).

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

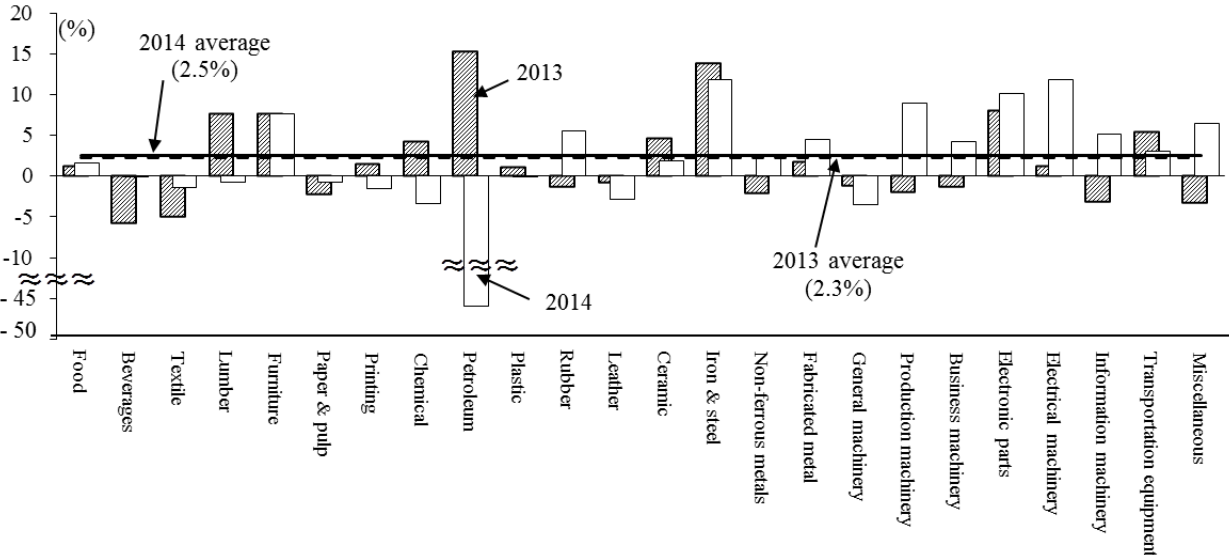


**(4) Value added (gross value added for manufacturing establishments with 29 or less employees): The value added increased for two consecutive years.**

The value added was 89.2080 trillion yen, up 2.5% from the preceding year, rising for two consecutive years (Table 1, Figure 1).

(i) 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 increased in 14 industry sectors. These industry sectors include "Manufacture of electrical machinery, equipment and supplies" (up 11.9% from the preceding year), "Manufacture of transportation equipment" (up 3.1% id.), and "Manufacture of production machinery" (up 9.0% id.). On the other hand, value added decreased in 10 industry sectors, such as "Manufacture of petroleum and coal products" (down 46.2%), "Manufacture of chemical and allied products" (down 3.4% id.), and "Manufacture of general-purpose machinery" (down 3.5% 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)**

Item	Value added					
	2013			2014		
	Value (million yen)	Y/Y (%)	Percentage (%)	Value (million yen)	Y/Y (%)	Percentage (%)
Total manufacturers	87,026,379	2.3	100.0	89,207,962	2.5	100.0
09 Food	8,398,170	1.2	9.7	8,533,136	1.6	9.6
10 Beverages, tobacco and feed	2,579,452	-5.8	3.0	2,575,625	-0.1	2.9
11 Textile products	1,315,409	-4.9	1.5	1,297,547	-1.4	1.5
12 Lumber and wood products	658,699	7.6	0.8	653,676	-0.8	0.7
13 Furniture and fixtures	579,373	7.6	0.7	624,161	7.7	0.7
14 Pulp, paper and paper products	2,009,494	-2.2	2.3	1,994,675	-0.7	2.2
15 Printing and allied industries	2,235,252	1.5	2.6	2,202,369	-1.5	2.5
16 Chemical and allied products	10,050,132	4.3	11.5	9,709,170	-3.4	10.9
17 Petroleum and coal products	1,108,509	15.3	1.3	596,085	-46.2	0.7
18 Plastic products	3,913,942	1.1	4.5	3,910,273	-0.1	4.4
19 Rubber products	1,229,284	-1.3	1.4	1,297,084	5.5	1.5
20 Leather tanning, leather products and fur skins	106,872	-0.7	0.1	103,793	-2.9	0.1
21 Ceramic, stone and clay products	2,652,477	4.6	3.0	2,701,857	1.9	3.0
22 Iron and steel	3,079,367	13.8	3.5	3,441,198	11.8	3.9
23 Non-ferrous metals and products	1,838,155	-2.1	2.1	1,888,164	2.7	2.1
24 Fabricated metal products	4,687,622	1.8	5.4	4,898,548	4.5	5.5
25 General-purpose machinery	3,765,612	-1.2	4.3	3,634,975	-3.5	4.1
26 Production machinery	5,299,623	-1.9	6.1	5,774,437	9.0	6.5
27 Business oriented machinery	2,546,641	-1.3	2.9	2,653,251	4.2	3.0
28 Electronic parts, devices and electronic circuits	4,386,399	8.1	5.0	4,830,549	10.1	5.4
29 Electrical machinery, equipment and supplies	5,106,237	1.2	5.9	5,711,650	11.9	6.4
30 Information and communication electronics equipment	2,057,976	-3.1	2.4	2,164,097	5.2	2.4
31 Transportation equipment	16,139,513	5.4	18.5	16,646,430	3.1	18.7
32 Miscellaneous manufacturing industries	1,282,170	-3.2	1.5	1,365,213	6.5	1.5

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

(ii) Observing the composition ratio of the value added by industry, "Manufacture of transportation equipment" recorded the largest value added (16.6464 trillion yen or 18.7% of the total), followed by "Manufacture of chemical and allied products" (9.7092 trillion yen or 10.9% id.), "Manufacture of food" (8.5331 trillion yen or 9.6% id.), "Manufacture of production machinery" (5.7744 trillion yen or 6.5% id.) and "Manufacture of electrical machinery, equipment and supplies" (5.7117 trillion yen or 6.4% id.). These five industry sectors accounted for over 50% of the total. Then, the list continues in descending order with "Manufacture of fabricated metal products" (5.5% id.), "Manufacture of electronic parts, devices and electronic circuits" (5.4% id.), "Manufacture of plastic products, except otherwise classified" (4.4% id.), "Manufacture of general-purpose machinery" (4.1% id.) and "Manufacture of iron and steel" (3.9% id.) (Table 5, Figure 9).

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

