

## General Situation

The Census of Manufacture for 2003 as a complete enumeration was implemented on December 31, 2003. The survey results were as follows.

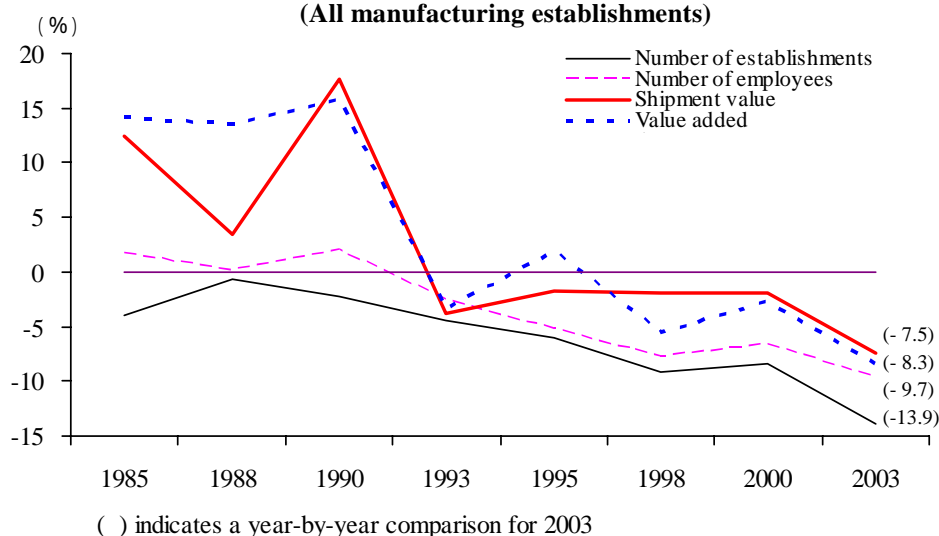
### I. Situation of All Manufacturing Establishments

The total number of manufacturing establishments hereinafter referred to as the “number of establishments” in 2003 was 504,530, a decrease of 13.9% compared to the previous complete enumeration year in 2000 (hereinafter referred to as the “previous survey”). Therefore, the number of establishments continued to decrease from the peak of 1983 (Table I-1, Figure I-1).

The number of employees was 8.66 million, a decrease of 9.7% compared to the previous survey for the fifth consecutive year.

The value of manufactured goods shipments (hereinafter referred to as the “shipment value”) was 276.2302 trillion yen, in a similar manner decreasing for the fifth consecutive year, down by 7.5% compared to the previous survey. The value added was 100.1143 trillion yen, down by 8.3% id. The value of total cash wages and salaries was 36.2020 trillion yen (down by 12.6% compared to the previous survey) and the value of raw materials consumed was 157.542 trillion yen (down by 6.9% id.). All major items decreased.

**Figure I-1: Change in Major Items Compared to the Previous Survey**  
(All manufacturing establishments)



**Table I-1: Change in Major Items**  
(All manufacturing establishments)

Year	Number of establishments		Number of employees		Shipment value		Value added <sup>(Note 3)</sup>		Value of cash wages and salaries		Value of raw materials consumed	
		Y/Y ( % )	(1,000 employees)	Y/Y ( % )	( billion yen )	Y/Y ( % )	( billion yen )	Y/Y ( % )	( billion yen )	Y/Y ( % )	( billion yen )	Y/Y ( % )
1983	780,280	6.2	11,347	3.8	238,688	11.2	80,900	13.5	31,662	19.0	147,445	6.5
1985	749,366	-4.0	11,543	1.7	268,476	12.5	92,317	14.1	35,157	11.0	164,329	11.5
1988	745,108	-0.6	11,554	0.1	277,835	3.5	104,752	13.5	38,305	9.0	159,889	-2.7
1990	728,853	-2.2	11,788	2.0	327,093	17.7	121,243	15.7	43,292	13.0	190,540	19.2
1993	696,090	-4.5	11,477	-2.6	314,787	-3.8	117,130	-3.4	46,392	7.2	177,714	-6.7
1995	654,436	-6.0	10,880	-5.2	309,437	-1.7	119,269	1.8	45,620	-1.7	172,156	-3.1
(Note 1) 1998	643,468	-9.2	10,399	-7.7	309,306	-1.9	115,280	-5.5	45,574	-2.5	173,349	-1.0
(Note 2) 2000	589,713	-8.4	9,700	-6.7	303,582	-1.9	112,112	-2.7	42,412	-6.9	170,945	-1.4
	(586,264)		(9,586)		(298,669)		(109,118)		(41,431)		(169,235)	
2003	504,530	-13.9	8,658	-9.7	276,230	-7.5	100,114	-8.3	36,202	-12.6	157,542	-6.9

Notes: 1. Because of the adjustment of establishment data in the 1998 survey, year-ago comparisons for 1998 are based on a time series.

2. Because of the revision of the Japan Standard Industrial Classification, the year-on-year comparisons for 2003 are calculated by incorporating the classification of 2000. Figures in parentheses are those following the incorporation of the classification.

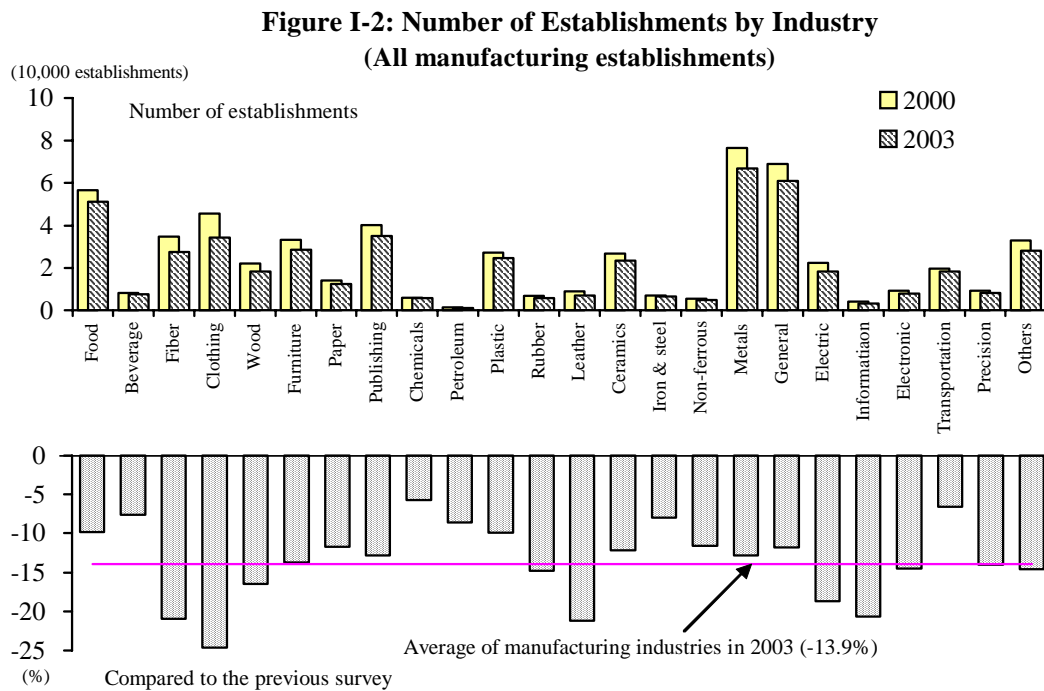
3. Value added for 2000: Establishments with 10 or more employees = Value added; Establishments with less than 10 employees = Gross value added  
Value added for 2003: Establishments with 30 or more employees = Value added; Establishments with less than 30 employees = Gross value added

## 1. Situation by industry

### (1) Number of establishments

(i) The number of establishments was 504,530, a decrease of 13.9% compared to the previous survey (Table I-2, Figure I-2).

(ii) Compared to the previous survey, a decrease was seen in all industries, particularly in industries such as apparel and other finished products (down by 24.6% compared to the previous survey), fabricated metal products (down by 12.8% id.), general machinery (down by 11.8% id.), textile mill products (down by 21.0% id.), and food (down by 9.8% id.).



Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, figures for 2000 and the year-on-year comparisons for 2003 are calculated by incorporating the classification.

(iii) The number of establishments was highest in the fabricated metal products industry (66,730 establishments, composition ratio of 13.2%), followed by the general machinery industry (60,892 establishments, 12.1% id.), the food industry (51,110 establishments, 10.1% id.), the publishing, printing and allied industries (34,940 establishments, 6.9% id.), and the apparel and other finished products industry (34,265 establishments, 6.8%).

(iv) Compared to the previous survey, the composition ratio increased in 10 industries: such as food (up by 0.4 point compared to the previous survey), general machinery (up by 0.3 point id.), and plastic products, fabricated metal products, and transportation equipment (up by 0.2 point id. respectively), and maintained the same level in 7 industries: such as furniture and fixtures, pulp, paper and paper products, and petroleum and coal products. Conversely, it decreased in 7 industries: such as textile mill products (down by 0.4 point id.), and lumber and wood products and electrical machinery, equipment and supplies (down by 0.2 point id. respectively).

**Table I-2: Statistical Table of Major Items by Industry**  
(All manufacturing establishments)

Industry	Number of establishments					Number of employees				
	2000 (Note 1)	2003				2000 (Note 1)	2003			
		Y/Y	Composition ratio	Point difference of composition ratio	Y/Y		Composition ratio	Point difference of composition ratio		
									(%)	(%)
						(persons)	(persons)			
00 Total manufactures	586,264	504,530	-13.9	100.0	0.0	9,586,115	8,658,392	-9.7	100.0	0.0
09 Food	56,640	51,110	-9.8	10.1	0.4	1,165,845	1,160,730	-0.4	13.4	1.2
10 Beverages, tobacco and feed	8,131	7,513	-7.6	1.5	0.1	118,424	112,870	-4.7	1.3	0.1
11 Textile mill products	34,817	27,498	-21.0	5.5	-0.4	229,742	184,362	-19.8	2.1	-0.3
12 Apparel and other finished products	45,461	34,265	-24.6	6.8	-1.0	432,685	318,559	-26.4	3.7	-0.8
13 Lumber and wood products	22,002	18,365	-16.5	3.6	-0.2	181,942	152,483	-16.2	1.8	-0.1
14 Furniture and fixtures	33,031	28,504	-13.7	5.6	0.0	204,138	171,707	-15.9	2.0	-0.1
15 Pulp, paper and paper products	13,902	12,278	-11.7	2.4	0.0	252,540	228,493	-9.5	2.6	0.0
16 Printing and allied industries	40,083	34,940	-12.8	6.9	0.1	428,309	393,221	-8.2	4.5	0.0
17 Chemical and allied products	5,943	5,606	-5.7	1.1	0.1	367,505	346,163	-5.8	4.0	0.2
18 Petroleum and coal products	1,312	1,199	-8.6	0.2	0.0	27,564	25,450	-7.7	0.3	0.0
19 Plastic products	27,110	24,433	-9.9	4.8	0.2	451,133	446,353	-1.1	5.2	0.5
20 Rubber products	6,763	5,763	-14.8	1.1	-0.1	136,897	126,019	-7.9	1.5	0.1
21 Leather tanning, leather products and fur skins	8,932	7,040	-21.2	1.4	-0.1	55,135	43,422	-21.2	0.5	-0.1
22 Ceramic, stone and clay products	26,768	23,505	-12.2	4.7	0.1	383,553	328,059	-14.5	3.8	-0.2
23 Iron and steel	6,905	6,353	-8.0	1.3	0.1	240,270	210,714	-12.3	2.4	-0.1
24 Non-ferrous metals and products	5,412	4,783	-11.6	0.9	0.0	145,782	133,725	-8.3	1.5	0.0
25 Fabricated metal products	76,504	66,730	-12.8	13.2	0.2	791,934	717,264	-9.4	8.3	0.0
26 General machinery	69,025	60,892	-11.8	12.1	0.3	1,097,446	989,310	-9.9	11.4	0.0
27 Electrical machinery, equipment and supplies	22,452	18,247	-18.7	3.6	-0.2	698,505	583,183	-16.5	6.7	-0.6
28 Information and communication electronics equipment	4,105	3,254	-20.7	0.6	-0.1	304,773	228,095	-25.2	2.6	-0.6
29 Electronic parts and devices	9,175	7,849	-14.5	1.6	0.0	588,675	503,013	-14.6	5.8	-0.3
30 Transportation equipment	19,696	18,388	-6.6	3.6	0.2	863,043	889,267	3.0	10.3	1.3
31 Precision instruments and machinery	9,279	7,978	-14.0	1.6	0.0	179,907	160,156	-11.0	1.8	-0.1
32 Miscellaneous manufacturing industries	32,816	28,037	-14.6	5.6	0.0	240,368	205,774	-14.4	2.4	-0.1

Industry	Shipment value					Value added (Note2)				
	2000 (Note 1)	2003				2000 (Note 1)	2003			
		Y/Y	Composition ratio	Point difference of composition ratio	Y/Y		Composition ratio	Point difference of composition ratio		
(million yen)	(million yen)	( % )	( % )	( % )	(million yen)	(million yen)	( % )	( % )	( % )	
00 Total manufactures	298,668,085	276,230,156	-7.5	100.0	0.0	109,117,961	100,114,254	-8.3	100.0	0.0
09 Food	24,080,249	22,918,126	-4.8	8.3	0.2	9,230,124	8,786,804	-4.8	8.8	0.3
10 Beverages, tobacco and feed	11,034,367	10,394,885	-5.8	3.8	0.1	3,482,343	3,109,321	-10.7	3.1	-0.1
11 Textile mill products	3,162,043	2,507,383	-20.7	0.9	-0.2	1,402,534	1,126,650	-19.7	1.1	-0.2
12 Apparel and other finished products	3,674,346	2,575,501	-29.9	0.9	-0.3	1,765,035	1,246,614	-29.4	1.2	-0.4
13 Lumber and wood products	3,311,573	2,707,889	-18.2	1.0	-0.1	1,252,132	1,032,238	-17.6	1.0	-0.1
14 Furniture and fixtures	2,919,798	2,424,835	-17.0	0.9	-0.1	1,319,190	1,084,237	-17.8	1.1	-0.1
15 Pulp, paper and paper products	7,985,840	7,135,060	-10.7	2.6	-0.1	3,008,832	2,684,942	-10.8	2.7	-0.1
16 Printing and allied industries	8,137,819	7,425,183	-8.8	2.7	0.0	3,799,079	3,488,477	-8.2	3.5	0.0
17 Chemical and allied products	23,799,380	23,369,088	-1.8	8.5	0.5	11,509,457	11,234,866	-2.4	11.2	0.7
18 Petroleum and coal products	9,456,813	9,935,145	5.1	3.6	0.4	714,395	680,121	-4.8	0.7	0.0
19 Plastic products	10,606,333	10,178,982	-4.0	3.7	0.1	4,321,545	4,182,534	-3.2	4.2	0.2
20 Rubber products	3,138,165	2,925,909	-6.8	1.1	0.0	1,462,546	1,352,336	-7.5	1.4	0.1
21 Leather tanning, leather products and fur skins	727,022	551,048	-24.2	0.2	0.0	290,271	222,793	-23.2	0.2	-0.1
22 Ceramic, stone and clay products	8,978,713	7,514,451	-16.3	2.7	-0.3	4,367,894	3,790,659	-13.2	3.8	-0.2
23 Iron and steel	11,962,966	11,935,509	-0.2	4.3	0.3	4,247,882	4,279,975	0.8	4.3	0.4
24 Non-ferrous metals and products	6,218,902	5,653,544	-9.1	2.0	-0.1	1,885,948	1,550,702	-17.8	1.5	-0.2
25 Fabricated metal products	15,586,811	13,608,759	-12.7	4.9	-0.3	7,049,685	6,204,866	-12.0	6.2	-0.3
26 General machinery	30,413,214	26,430,626	-13.1	9.6	-0.6	11,873,775	10,625,936	-10.5	10.6	-0.3
27 Electrical machinery, equipment and supplies	20,790,170	17,965,261	-13.6	6.5	-0.5	7,590,695	6,373,147	-16.0	6.4	-0.6
28 Information and communication electronics equipment	17,555,888	12,718,979	-27.6	4.6	-1.3	4,766,696	3,118,865	-34.6	3.1	-1.3
29 Electronic parts and devices	21,235,614	17,434,384	-17.9	6.3	-0.8	7,868,818	6,303,161	-19.9	6.3	-0.9
30 Transportation equipment	44,447,438	49,954,952	12.4	18.1	3.2	11,869,936	14,314,075	20.6	14.3	3.4
31 Precision instruments and machinery	4,118,869	3,627,983	-11.9	1.3	-0.1	1,802,718	1,583,301	-12.2	1.6	-0.1
32 Miscellaneous manufacturing industries	5,325,750	4,336,674	-18.6	1.6	-0.2	2,236,429	1,737,633	-22.3	1.7	-0.3

Industry	Value of total cash wages and salaries					Value of materials consumed				
	2000	2003				2000	2003			
	(Note 1)		Y/Y	Composition ratio	Point difference of composition ratio	(Note 1)		Y/Y	Composition ratio	Point difference of composition ratio
	(million yen)	(million yen)	( % )	( % )	( % )	(million yen)	(million yen)	( % )	( % )	( % )
00 Total manufactures	41,430,535	36,202,030	-12.6	100.0	0.0	169,235,383	157,541,973	-6.9	100.0	0.0
09 Food	3,385,345	3,140,307	-7.2	8.7	0.5	13,815,855	13,193,842	-4.5	8.4	0.2
10 Beverages, tobacco and feed	541,233	485,637	-10.3	1.3	0.0	3,791,713	3,519,644	-7.2	2.2	0.0
11 Textile mill products	690,774	521,425	-24.5	1.4	-0.3	1,591,866	1,264,703	-20.6	0.8	-0.1
12 Apparel and other finished products	917,665	629,700	-31.4	1.7	-0.5	1,775,060	1,237,692	-30.3	0.8	-0.2
13 Lumber and wood products	589,382	466,243	-20.9	1.3	-0.1	1,939,168	1,590,736	-18.0	1.0	-0.1
14 Furniture and fixtures	656,133	524,808	-20.0	1.4	-0.2	1,505,855	1,248,140	-17.1	0.8	-0.1
15 Pulp, paper and paper products	1,102,506	944,399	-14.3	2.6	-0.1	4,440,960	3,980,551	-10.4	2.5	-0.1
16 Printing and allied industries	1,797,733	1,543,311	-14.2	4.3	0.0	3,932,791	3,569,660	-9.2	2.3	0.0
17 Chemical and allied products	2,281,120	2,080,476	-8.8	5.7	0.2	10,758,864	10,669,590	-0.8	6.8	0.4
18 Petroleum and coal products	202,100	170,599	-15.6	0.5	0.0	5,982,932	6,434,560	7.5	4.1	0.6
19 Plastic products	1,751,286	1,642,486	-6.2	4.5	0.3	5,673,816	5,442,938	-4.1	3.5	0.1
20 Rubber products	592,380	527,459	-11.0	1.5	0.1	1,478,886	1,408,195	-4.8	0.9	0.0
21 Leather tanning, leather products and fur skins	140,251	102,908	-26.6	0.3	0.0	418,001	313,320	-25.0	0.2	0.0
22 Ceramic, stone and clay products	1,652,610	1,355,067	-18.0	3.7	-0.3	4,002,386	3,246,989	-18.9	2.1	-0.3
23 Iron and steel	1,439,268	1,209,869	-15.9	3.3	-0.2	6,845,434	6,906,656	0.9	4.4	0.4
24 Non-ferrous metals and products	756,010	660,108	-12.7	1.8	0.0	3,991,958	3,734,592	-6.4	2.4	0.0
25 Fabricated metal products	3,220,234	2,748,112	-14.7	7.6	-0.2	7,789,732	6,768,715	-13.1	4.3	-0.3
26 General machinery	5,512,658	4,817,537	-12.6	13.3	0.0	16,887,126	14,700,016	-13.0	9.3	-0.7
27 Electrical machinery, equipment and supplies	3,289,376	2,691,238	-18.2	7.4	-0.5	12,365,783	10,851,639	-12.2	6.9	-0.4
28 Information and communication electronics equipment	1,593,462	1,150,298	-27.8	3.2	-0.6	12,331,826	9,167,218	-25.7	5.8	-1.5
29 Electronic parts and devices	2,752,063	2,341,891	-14.9	6.5	-0.1	11,968,796	9,735,398	-18.7	6.2	-0.9
30 Transportation equipment	4,938,459	5,067,742	2.6	14.0	2.1	30,884,784	34,228,255	10.8	21.7	3.5
31 Precision instruments and machinery	781,195	691,433	-11.5	1.9	0.0	2,142,077	1,891,606	-11.7	1.2	-0.1
32 Miscellaneous manufacturing industries	847,294	688,976	-18.7	1.9	-0.1	2,919,714	2,437,318	-16.5	1.5	-0.2

Notes: 1. Because of the revision of the Japan Standard Industrial Classification, the classification of 2000 was incorporated into that of 2003.

Note that figures for 2000 do not always correspond with those in past statistics tables.

2. Value added for 2000: Establishments with 10 or more employees = Value added; Establishments with less than 10 employees = Gross value added

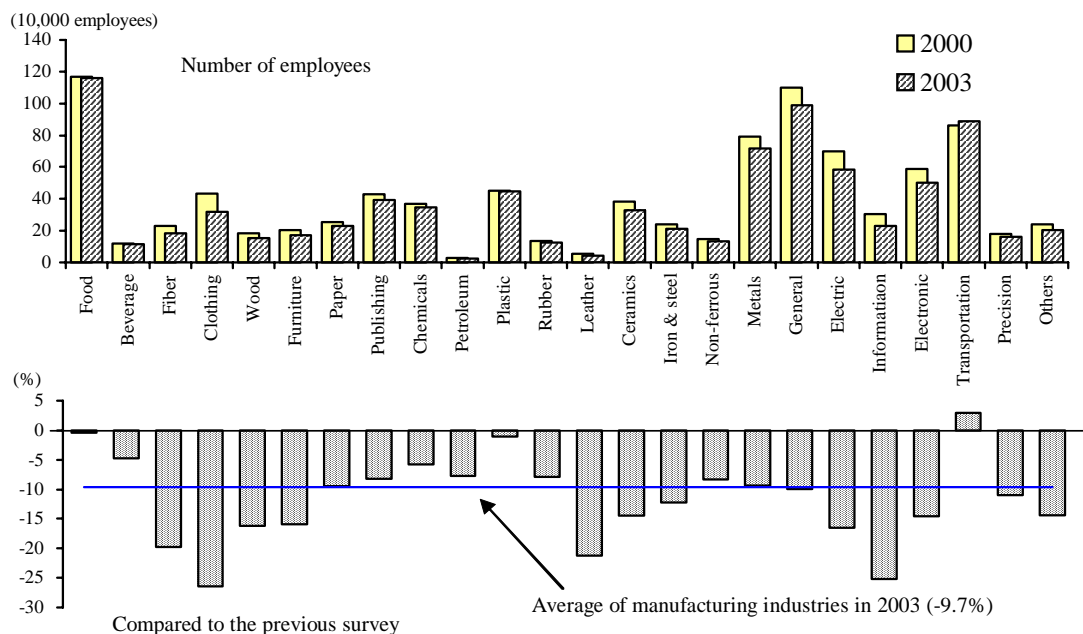
Value added for 2003: Establishments with 30 or more employees = Value added; Establishments with less than 30 employees = Gross value added

## (2) Number of employees

(i) The number of employees was 8,658,392, a decrease of 9.7% compared to the previous survey (Table I-2, Figure I-3).

(ii) Compared to the previous survey, although the number of employees increased in transportation equipment (up by 3.0% compared to the previous survey), it decreased in other industries, particularly in the following industries: electrical machinery, equipment and supplies (down by 16.5% id.), apparel and other finished products (down by 26.4 id.), general machinery (down by 9.9% id.), electronic parts and devices (down by 14.6% id.), and information and communication electronic equipment (down by 25.2% id.).

**Figure I-3: Number of Employees by Industry**  
(All manufacturing establishments)



Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, figures for 2000 and the year-on-year comparisons for 2003 are calculated by incorporating the classification.

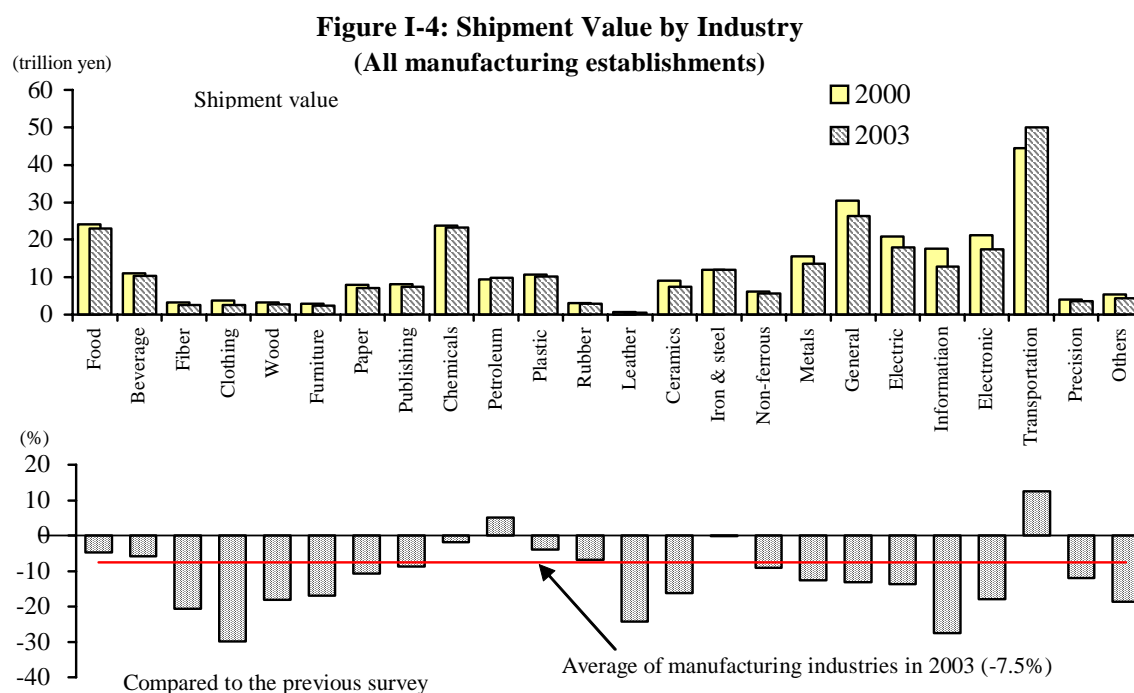
(iii) The number of employees was highest in the food industry (1,160,730 employees, composition ratio of 13.4%), followed by the general machinery industry (989,310 employees, 11.4% id.), the transportation equipment industry (889,267 employees, 10.3% id.), the fabricated metal products industry (717,264 employees, 8.3% id.), the electrical machinery, equipment and supplies industry (583,183 employees, 6.7% id.), and the electronic parts and devices industry (503,013 employees, 5.8% id.).

(iv) Compared to the previous survey, the composition ratio increased in 6 industries: such as transportation equipment (up by 1.3 point compared to the previous survey), food (up 1.2 point id.), plastic products (up by 0.5 point id.), and chemical and allied products (up by 0.2 point id.), and maintained the same level in 6 industries: such as pulp, paper, and paper products, publishing, printing and allied industries, and petroleum and coal products. Conversely, it decreased in 12 industries: such as apparel and other finished products (down by 0.8 point id.), electrical machinery, equipment and supplies and information and communication electronics equipment (down by 0.6 point id. respectively), and textile mill products and electronic parts and devices (down 0.3 point id. respectively).

### (3) Shipment value

(i) Shipment value was 276.2302 trillion yen, which decreased by 7.5% compared to the previous survey (Table I-2, Figure I-4).

(ii) Compared to the previous survey, shipment value decreased in 22 industries, including information and communication electronics equipment (down by 27.6% compared to the previous survey), general machinery (down by 13.1% id.), electronic parts and devices (down by 17.9% id.), electronic machinery (down by 13.6% id.) and fabricated metal products (down by 12.7% id.). Conversely, it increased in 2 industries: transportation equipment (up by 12.4% id.) and petroleum and coal products (up by 5.1% id.).



Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, figures for 2000 and the year-on-year comparisons for 2003 are calculated by incorporating the classification.

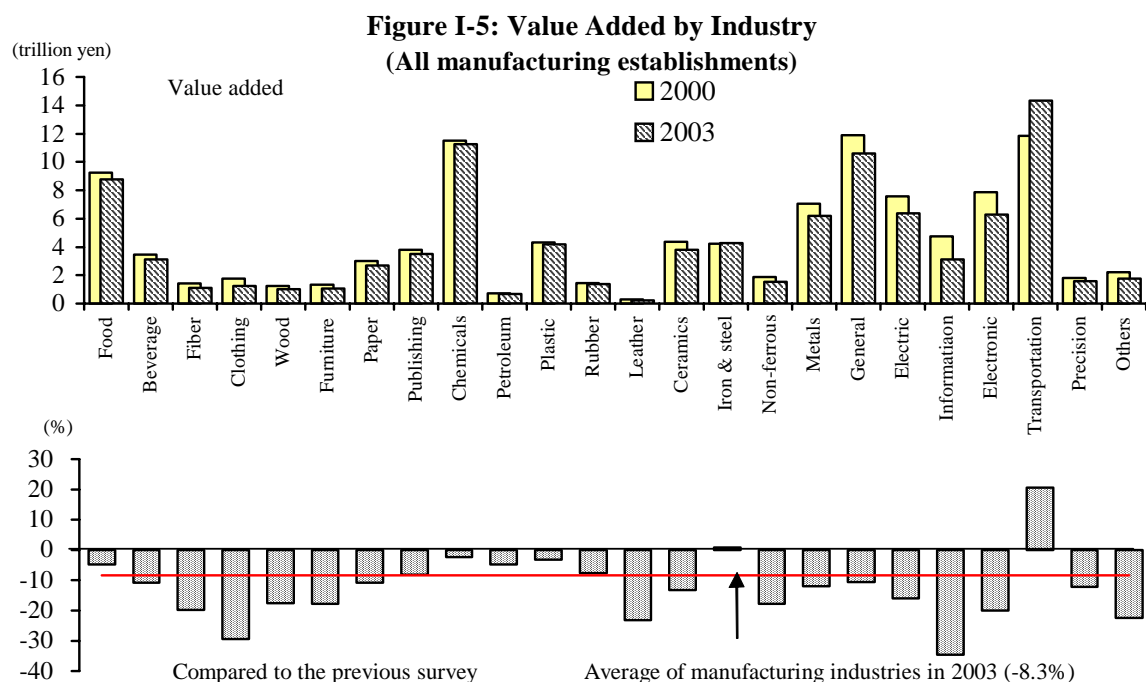
(iii) Shipment value was highest in the transportation equipment industry (49.9550 trillion yen, composition ratio of 18.1%), followed by the general machinery industry (26.4306 trillion yen, 9.6% id.), the chemical and allied products industry (23.3691 trillion yen, 8.5% id.), the food industry (22.9181 trillion yen, 8.3% id.), the electrical machinery, equipment and supplies industry (17.9653 trillion yen, 6.5% id.), and the electronic parts and devices industry (17.4344 trillion yen, 6.3% id.).

(iv) Compared to the previous survey, the composition ratio increased in 7 industries: such as transportation equipment (up by 3.2 point compared to the previous survey), chemical and allied products (up by 0.5 point id.), petroleum and coal products (up by 0.4 point id.), iron and steel (up by 0.3 point id.), while that of the publishing, printing and allied industries, rubber products, and leather tanning, leather products and fur skins maintained the same level. Conversely, it decreased in 14 industries: such as information and communication electronics equipment (down by 1.3 point id.), electronic parts and devices (down by 0.8 point id.), general machinery (down by 0.6 point id.), and electrical machinery, equipment and supplies (down by 0.5 point id.).

#### (4) Value added

(i) Value added was 100.1143 trillion yen, a decrease of 8.3% compared to the previous survey (Table I-2, Figure I-5).

(ii) Compared to the previous survey, value added decreased in 22 industries: such as information and communication electronics equipment (down by 34.6% compared to the previous survey), electronic parts and devices (down by 19.9% id.), general machinery (down by 10.5% id.), electrical machinery, equipment and supplies (down by 16.0% id.), and fabricated metal products (down by 12.0% id.), whereas it increased in 2 industries: transportation equipment (up by 20.6% id.), and iron and steel (up by 0.8% id.).



Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, figures for 2000 and the year-on-year comparisons for 2003 are calculated by incorporating the classification.

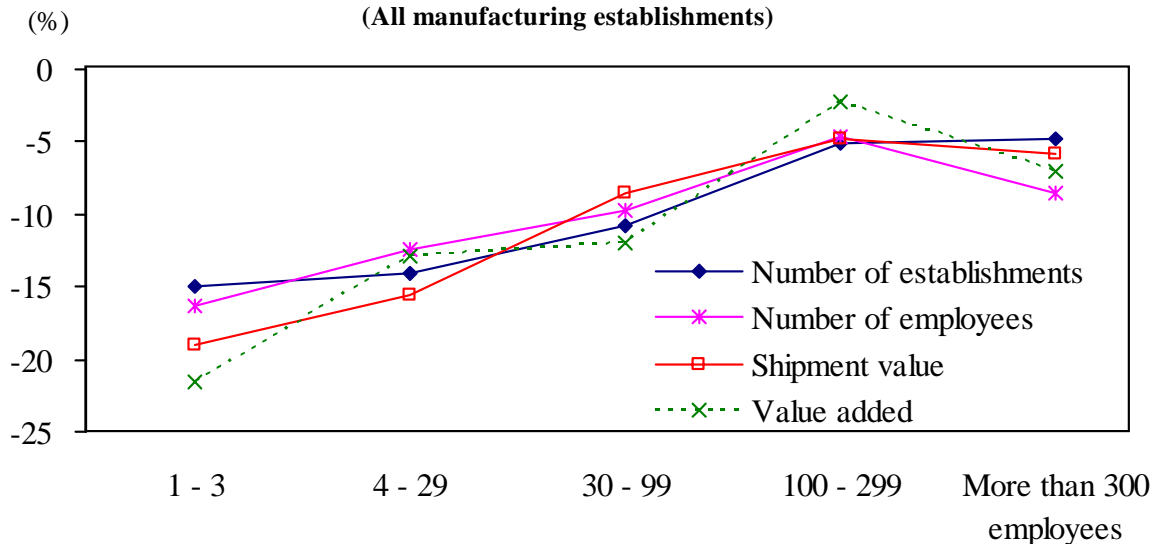
(iii) Value added was highest in the transportation equipment industry (14.3141 trillion yen, composition ratio of 14.3%), followed by the chemical and allied products industry (11.2349 trillion yen, 11.2% id.), the general machinery industry (10.6259 trillion yen, 10.6% id.), the food industry (8.7868 trillion yen, 8.8% id.), the electrical machinery, equipment and supplies industry (6.3731 trillion yen, 6.4% id.), the electronic parts and devices industry (6.3032 trillion yen, 6.3% id.), and the fabricated metal products industry (6.2049 trillion yen, 6.2% id.).

(iv) Compared to the previous survey, the composition ratio increased in 6 industries: such as transportation equipment (up by 3.4 points compared to the previous survey), chemical and allied products (up by 0.7 point id.), iron and steel (up by 0.4 point id.), and food (up by 0.3 point id.), while that of the publishing, printing and allied industries, and petroleum and coal products maintained the same level. Conversely, it decreased in 16 industries; such as information and communication electronics equipment (down by 1.3 point id.), electronic parts and devices (down by 0.9 point id.), electrical machinery, equipment and supplies (down by 0.6 point id.), apparel and other finished products (down by 0.4 points id.), and fabricated metal products, general machinery, and miscellaneous manufacturing industries (down by 0.3 point id. respectively).

## 2. Situation by size of workforce

Comparing major items by size of workforce to those in the previous survey, the figures decreased for all sizes and all major items. There was a trend of larger rates of decline for smaller workforce sizes (Figure I-8).

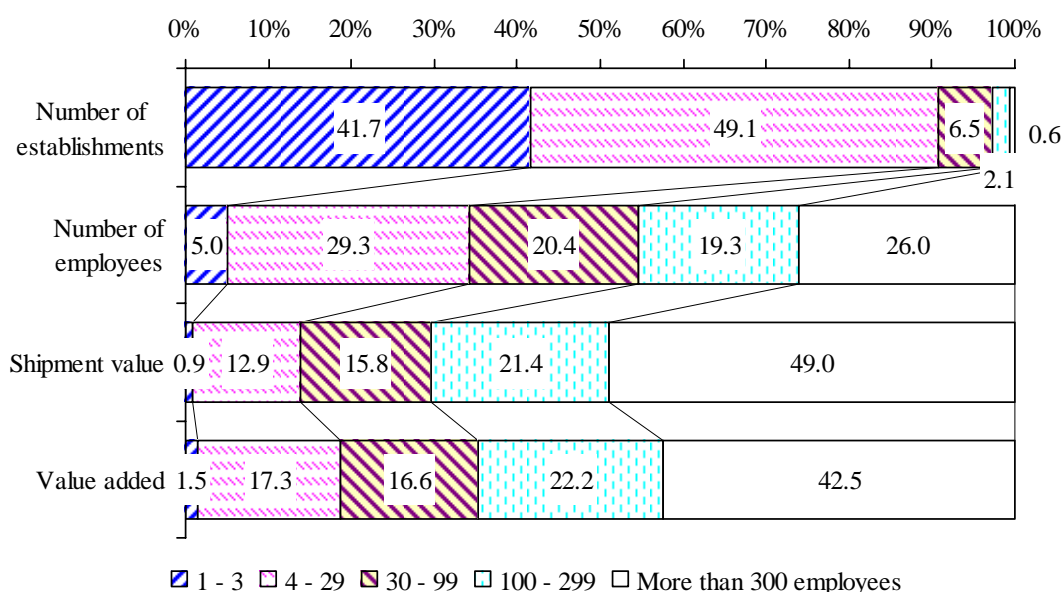
**Figure I-8: Major Items by Size of Workforce Compared to the Previous Survey (2003)**  
(All manufacturing establishments)



Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, figures for 2000 and the year-on-year comparisons in 2003 are calculated by incorporating the classification.

The ratio of manufacturing establishments with 4 to 29 employees accounted for 49.1%, followed by those with 1 to 3 employees (41.7% id.), making these two workforce sizes account for over 90% of manufacturing establishments. In terms of shipment value, the ratio of manufacturing establishments with more than 300 employees accounted for nearly half (49.0%), followed by those with 100 to 299 employees (21.4% id.) and those with 30 to 99 employees (15.8% id.) (Figure I-9).

**Figure I-9: Composition Ratio of Major Items by Size of Workforce (2003)**  
(All manufacturing establishments)





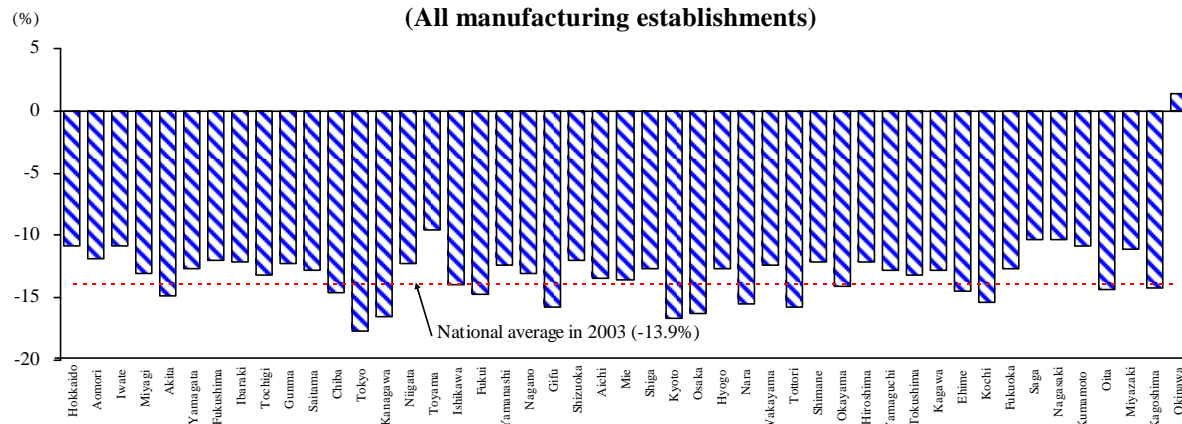
### 3. Situation by prefecture

#### (1) Number of establishments

The number of establishments decreased in all prefectures excluding Okayama. In particular, the decreases were significant in Tokyo (down by 17.7% compared to the previous survey), Kyoto (down by 16.6% id.), Kanagawa (down by 16.5% id.), Osaka (down by 16.3% id.), Gifu and Tottori (down by 15.8% id. respectively), and Nara (down by 15.5% id) (Table I-3, Figure I-10).

The number of manufacturing establishments was highest in Tokyo (49,580 establishments), Osaka (47,403), Aichi (42,281), Saitama (28,809), Shizuoka (22,593), Hyogo (19,859), Kanagawa (18,475), Gifu (17,084) and Kyoto (15,099).

**Figure I-10: Number of Establishments by Prefecture Compared to the Previous Survey (2003)**  
(All manufacturing establishments)



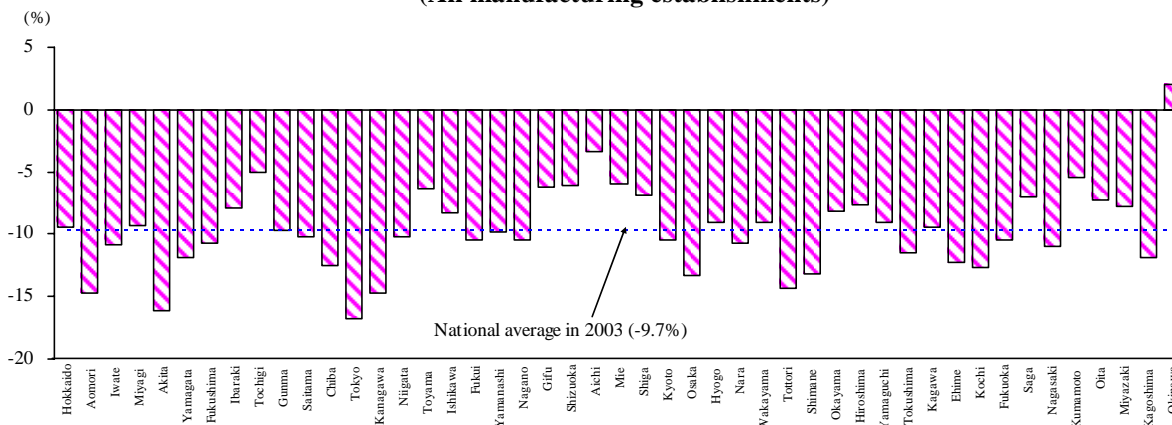
Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2003 are calculated by incorporating the classification.

#### (2) Number of employees

Compared to the previous survey, the number of employees decreased in all prefectures excluding Okayama. In particular, the decreases were significant in Tokyo (down by 16.8% compared to the previous survey), Akita (down by 16.1% id.), Aomori and Kanagawa (down by 14.7% id. respectively), Tottori (down by 14.3% id.), Osaka (down by 13.3% id.), and Shimane (down by 13.2% id.) (Table I-3, Figure I-11).

The number of employees was highest in Aichi (832,394 employees), Osaka (586,722), Tokyo (467,210), Saitama (454,996), Shizuoka (451,808), Kanagawa (446,190), Hyogo (380,146) and Ibaraki (271,566).

**Figure I-11: Number of Employees by Prefecture Compared to the Previous Survey (2003)**  
(All manufacturing establishments)



Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2003 are calculated by incorporating the classification.

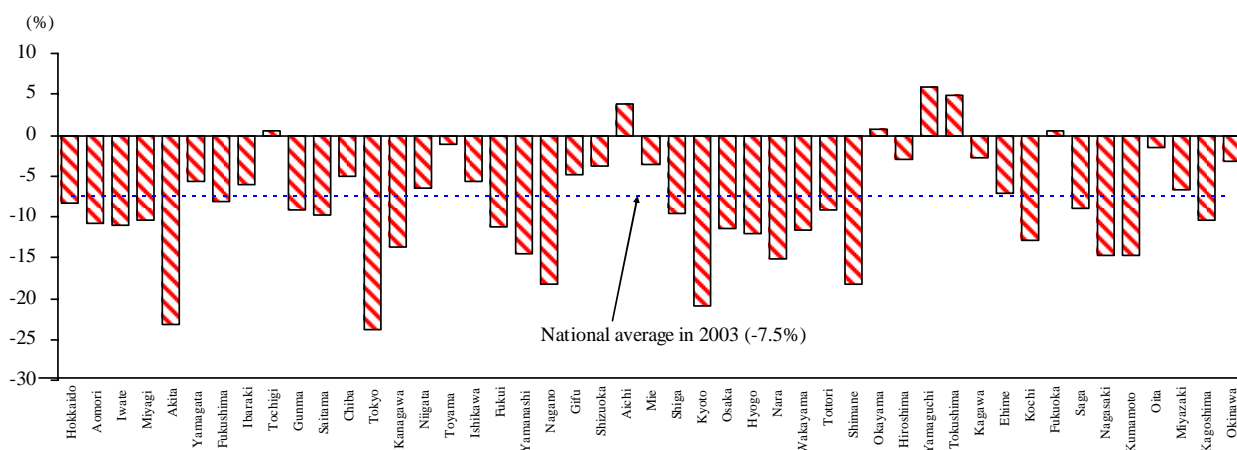


### (3) Shipment value

Compared to the previous survey, although shipment value increased in 6 prefectures: such as Yamaguchi (up by 5.9% compared to the previous survey), Tokushima (up by 4.8% id.), Aichi (up by 3.9% id.), Okayama (up by 0.8% id.), Tochigi (up by 0.6% id.), and Fukuoka (up by 0.5% id.), it decreased in 41 prefectures: such as Tokyo (down by 23.8% id.), Akita (down by 23.1% id.), Kyoto (down by 20.9% id.), Nagano and Shimane (down by 18.3% id. respectively), and Nara (down by 15.1% id.) (Table I-3, Figure I-12). An increase for the transportation equipment industry contributed significantly to increases for Yamaguchi, Aichi, Okayama, Tochigi, and Fukuoka. Shipment value was significantly affected by decreases for the information and communication electronics equipment industry, other machinery industries, and the printing and allied industries for Tokyo, decreases for the electronic parts and devices industry for Akita, and decreases for the electronic parts and devices industry and the transportation equipment industry for Kyoto.

Shipment value was highest in Aichi (35.7000 trillion yen), followed by Kanagawa (18.8586 trillion yen), Shizuoka (16.1013 trillion yen), Osaka (15.8222 trillion yen), Saitama (13.2220 trillion yen), Hyogo (12.4357 trillion yen), Tokyo (11.6259 trillion yen), Chiba (10.9352 trillion yen) and Ibaraki (10.1133 trillion yen).

**Figure I-12: Shipment Value by Prefecture Compared to the Previous Survey (2003)**  
(All manufacturing establishments)



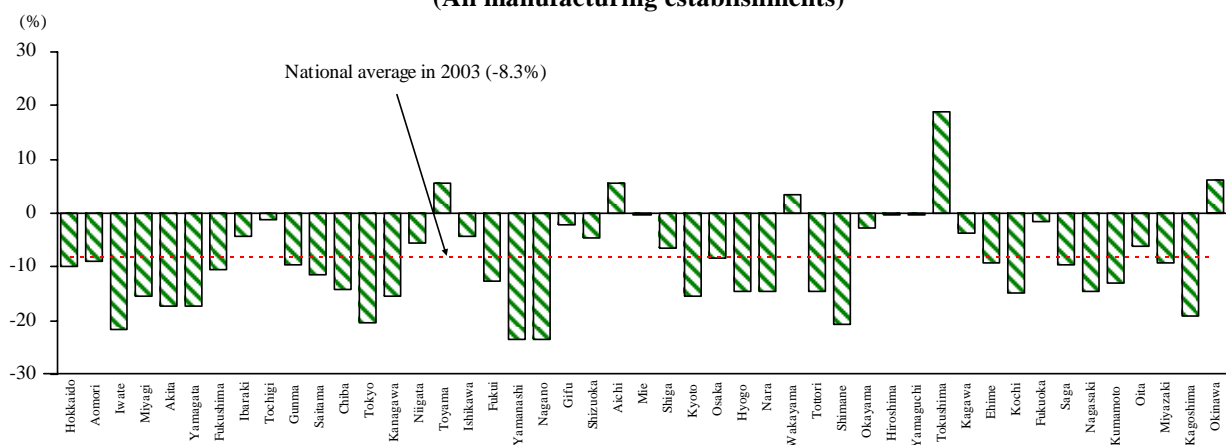
Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, the year-on-year comparisons in 2003 are calculated by incorporating the classification

#### (4) Value added

Compared to the previous survey, value added increased in 5 prefectures: Tokushima (up by 18.8% compared to the previous survey), Okinawa (up by 6.1% id.), Toyama (up by 5.7% id.), Aichi (up by 5.6% id.), and Wakayama (up by 3.3% id.), while it decreased in 42 prefectures: such as Yamanashi and Nagano (down by 23.4% id. respectively), Iwate (down by 21.8% id.), Shimane (down by 20.8% id.), Tokyo (down by 20.5% id.), Kagoshima (down by 19.2% id.), and Akita and Yamagata (down by 17.4% id. respectively) (Table I-3, Figure I-13).

Value added was highest in Aichi (11.2233 trillion yen), followed by Osaka (6.5871 trillion yen), Kanagawa (6.4843 trillion yen), Shizuoka (6.0051 trillion yen), Saitama (4.9134 trillion yen), Tokyo (4.8057 trillion yen), Hyogo (4.6417 trillion yen), Ibaraki (3.6315 trillion yen) and Chiba (3.4611 trillion yen).

**Figure I-13: Value Added by Prefecture Compared to the Previous Survey (2003)**  
(All manufacturing establishments)



Note: Because of the revision of the Japan Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2003 are calculated by incorporating the classification

**Table 1-3: Statistical Table of Major Items by Prefecture**  
(All manufacturing establishments)

Prefecture	Number of establishments				Number of employees				Shipment value			
	2000 (Note 1)	2003			2000 (Note 1)	2003			2000 (Note 1)	2003		
			Y/Y (%)	Composition ratio (%)			Y/Y (%)	Composition ratio (%)			Y/Y (%)	Composition ratio (%)
Total	586,264	504,530	-13.9	100.0	9,586,115	8,658,392	-9.7	100.0	298,668,085	276,230,156	-7.5	100.0
1 Hokkaido	11,953	10,668	-10.8	2.1	220,808	200,100	-9.4	2.3	5,857,274	5,373,667	-8.3	1.9
2 Aomori	3,618	3,188	-11.9	0.6	76,281	65,039	-14.7	0.8	1,369,673	1,221,634	-10.8	0.4
3 Iwate	4,624	4,126	-10.8	0.8	114,050	101,603	-10.9	1.2	2,449,948	2,178,065	-11.1	0.8
4 Miyagi	6,656	5,782	-13.1	1.1	147,040	133,327	-9.3	1.5	3,854,215	3,450,803	-10.5	1.2
5 Akita	4,845	4,130	-14.8	0.8	95,419	80,072	-16.1	0.9	1,708,029	1,313,836	-23.1	0.5
6 Yamagata	6,841	5,971	-12.7	1.2	133,798	117,905	-11.9	1.4	2,978,757	2,810,722	-5.6	1.0
7 Fukushima	9,651	8,494	-12.0	1.7	207,642	185,526	-10.7	2.1	5,720,480	5,252,497	-8.2	1.9
8 Ibaraki	12,691	11,160	-12.1	2.2	295,015	271,566	-7.9	3.1	10,770,869	10,113,292	-6.1	3.7
9 Tochigi	12,623	10,953	-13.2	2.2	226,649	215,211	-5.0	2.5	7,705,943	7,749,790	0.6	2.8
10 Gunma	14,711	12,898	-12.3	2.6	251,166	226,810	-9.7	2.6	8,080,852	7,345,426	-9.1	2.7
11 Saitama	33,048	28,809	-12.8	5.7	506,679	454,996	-10.2	5.3	14,648,120	13,222,039	-9.7	4.8
12 Chiba	12,674	10,820	-14.6	2.1	262,980	230,100	-12.5	2.7	11,510,025	10,935,248	-5.0	4.0
13 Tokyo	60,217	49,580	-17.7	9.8	561,763	467,210	-16.8	5.4	15,263,001	11,625,941	-23.8	4.2
14 Kanagawa	22,120	18,475	-16.5	3.7	522,920	446,190	-14.7	5.2	21,852,575	18,858,604	-13.7	6.8
15 Niigata	16,043	14,068	-12.3	2.8	240,904	216,298	-10.2	2.5	4,712,383	4,407,676	-6.5	1.6
16 Toyama	6,345	5,741	-9.5	1.1	138,373	129,532	-6.4	1.5	3,466,595	3,427,600	-1.1	1.2
17 Ishikawa	10,254	8,829	-13.9	1.7	115,868	106,203	-8.3	1.2	2,537,823	2,395,471	-5.6	0.9
18 Fukui	7,287	6,217	-14.7	1.2	93,704	83,873	-10.5	1.0	2,001,956	1,776,536	-11.3	0.6
19 Yamanashi	6,184	5,417	-12.4	1.1	89,020	80,277	-9.8	0.9	2,652,356	2,265,103	-14.6	0.8
20 Nagano	14,365	12,478	-13.1	2.5	249,429	223,115	-10.5	2.6	7,035,919	5,745,217	-18.3	2.1
21 Gifu	20,288	17,084	-15.8	3.4	232,442	218,032	-6.2	2.5	5,155,902	4,902,967	-4.9	1.8
22 Shizuoka	25,667	22,593	-12.0	4.5	481,013	451,808	-6.1	5.2	16,740,322	16,101,266	-3.8	5.8
23 Aichi	48,819	42,281	-13.4	8.4	861,552	832,394	-3.4	9.6	34,369,424	35,700,041	3.9	12.9
24 Mie	9,683	8,372	-13.5	1.7	203,368	191,429	-5.9	2.2	8,138,644	7,843,068	-3.6	2.8
25 Shiga	6,668	5,823	-12.7	1.2	160,327	149,253	-6.9	1.7	6,420,119	5,813,399	-9.5	2.1
26 Kyoto	18,102	15,099	-16.6	3.0	194,372	174,190	-10.4	2.0	5,919,017	4,683,369	-20.9	1.7
27 Osaka	56,613	47,403	-16.3	9.4	676,700	586,722	-13.3	6.8	17,861,959	15,822,171	-11.4	5.7
28 Hyogo	22,716	19,859	-12.6	3.9	418,241	380,146	-9.1	4.4	14,138,200	12,435,693	-12.0	4.5
29 Nara	6,576	5,559	-15.5	1.1	86,216	77,009	-10.7	0.9	2,449,368	2,078,413	-15.1	0.8
30 Wakayama	5,238	4,587	-12.4	0.9	64,090	58,299	-9.0	0.7	2,286,218	2,020,197	-11.6	0.7
31 Tottori	2,151	1,812	-15.8	0.4	48,173	41,271	-14.3	0.5	1,203,523	1,093,467	-9.1	0.4
32 Shimane	3,079	2,707	-12.1	0.5	54,433	47,251	-13.2	0.5	1,230,515	1,005,906	-18.3	0.4
33 Okayama	8,615	7,403	-14.1	1.5	171,268	157,153	-8.2	1.8	6,387,071	6,439,452	0.8	2.3
34 Hiroshima	11,951	10,505	-12.1	2.1	233,492	215,783	-7.6	2.5	7,238,279	7,022,404	-3.0	2.5
35 Yamaguchi	4,144	3,615	-12.8	0.7	108,971	99,075	-9.1	1.1	4,857,191	5,141,503	5.9	1.9
36 Tokushima	3,726	3,233	-13.2	0.6	60,583	53,606	-11.5	0.6	1,506,318	1,578,353	4.8	0.6
37 Kagawa	5,200	4,534	-12.8	0.9	80,473	72,927	-9.4	0.8	2,157,542	2,096,688	-2.8	0.8
38 Ehime	5,999	5,128	-14.5	1.0	104,569	91,689	-12.3	1.1	3,471,886	3,221,411	-7.2	1.2
39 Kochi	2,876	2,434	-15.4	0.5	35,083	30,619	-12.7	0.4	631,127	549,984	-12.9	0.2
40 Fukuoka	13,248	11,559	-12.7	2.3	258,457	231,330	-10.5	2.7	7,273,039	7,306,518	0.5	2.6
41 Saga	3,297	2,956	-10.3	0.6	65,649	61,040	-7.0	0.7	1,618,679	1,474,143	-8.9	0.5
42 Nagasaki	4,667	4,184	-10.3	0.8	72,800	64,785	-11.0	0.7	1,545,727	1,317,879	-14.7	0.5
43 Kumamoto	4,522	4,028	-10.9	0.8	103,808	98,203	-5.4	1.1	2,813,254	2,399,599	-14.7	0.9
44 Oita	3,442	2,951	-14.3	0.6	73,941	68,621	-7.2	0.8	3,086,568	3,040,728	-1.5	1.1
45 Miyazaki	3,315	2,946	-11.1	0.6	66,409	61,249	-7.8	0.7	1,323,249	1,236,266	-6.6	0.4
46 Kagoshima	6,183	5,304	-14.2	1.1	93,710	82,563	-11.9	1.0	2,037,068	1,825,525	-10.4	0.7
47 Okinawa	2,729	2,767	1.4	0.5	26,467	26,992	2.0	0.3	631,083	610,578	-3.2	0.2

Notes: 1. Because of the revision of the Japan Standard Industrial Classification, the classification of 2000 was incorporated into that of 2003.

Note that figures for 2000 do not always correspond with those in past statistics tables.

2. Value added for 2000: Establishments with 10 or more employees = Value added; Establishments with less than 10 employees = Gross value added

Value added for 2003: Establishments with 30 or more employees = Value added; Establishments with less than 30 employees = Gross value added

**Table 1-3: Statistical Table of Major Items by Prefecture (Continued)**  
(All manufacturing establishments)

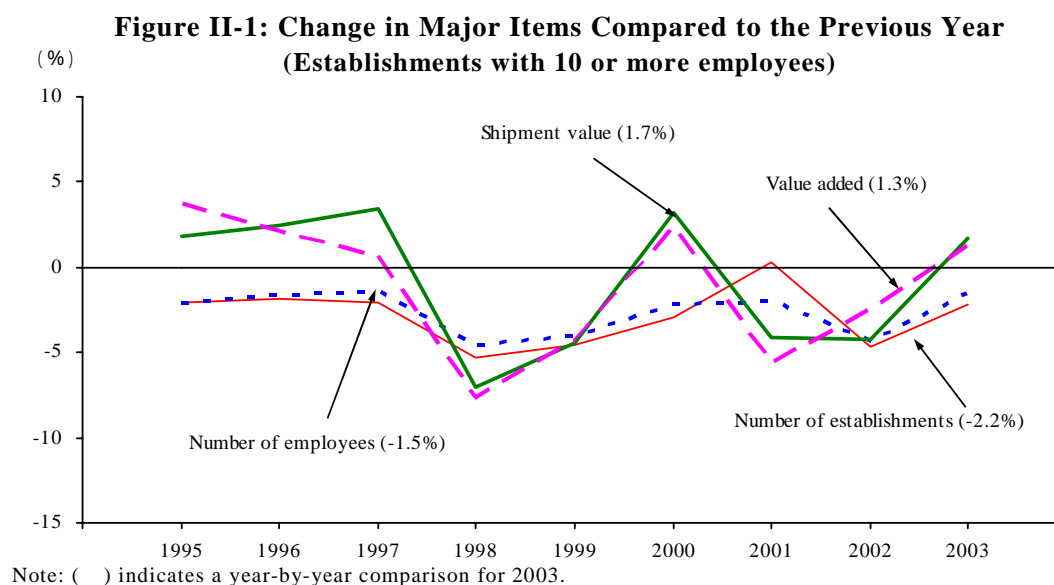
Prefecture	Value added (Note 2)				Value of total cash wages and salaries				Value of raw materials consumed			
	2000	2003			2000	2003			2000	2003		
	(Note 1) (million yen)	(million yen)	Y/Y (%)	Composition ratio (%)	(Note 1) (million yen)	(million yen)	Y/Y (%)	Composition ratio (%)	(Note 1) (million yen)	(million yen)	Y/Y (%)	Composition ratio (%)
Total	109,117,961	100,114,254	-8.3	100.0	41,430,535	36,202,030	-12.6	100.0	169,235,383	157,541,973	-6.9	100.0
1 Hokkaido	2,047,553	1,846,142	-9.8	1.8	774,860	671,643	-13.3	1.9	3,246,468	3,061,846	-5.7	1.9
2 Aomori	443,454	403,455	-9.0	0.4	213,654	185,039	-13.4	0.5	817,368	725,976	-11.2	0.5
3 Iwate	884,774	691,708	-21.8	0.7	374,437	334,478	-10.7	0.9	1,381,282	1,259,065	-8.8	0.8
4 Miyagi	1,340,837	1,132,394	-15.5	1.1	535,385	474,695	-11.3	1.3	2,151,535	2,013,379	-6.4	1.3
5 Akita	615,493	508,300	-17.4	0.5	293,302	231,889	-20.9	0.6	1,001,584	734,641	-26.7	0.5
6 Yamagata	1,082,214	893,661	-17.4	0.9	456,279	385,030	-15.6	1.1	1,745,200	1,783,814	2.2	1.1
7 Fukushima	2,234,027	1,996,185	-10.6	2.0	781,726	691,259	-11.6	1.9	2,996,463	2,785,080	-7.1	1.8
8 Ibaraki	3,798,205	3,631,512	-4.4	3.6	1,344,044	1,214,241	-9.7	3.4	6,191,244	5,755,206	-7.0	3.7
9 Tochigi	2,848,066	2,812,142	-1.3	2.8	1,012,791	945,366	-6.7	2.6	4,212,405	4,271,907	1.4	2.7
10 Gunma	2,920,747	2,637,974	-9.7	2.6	1,074,455	930,377	-13.4	2.6	4,742,643	4,307,758	-9.2	2.7
11 Saitama	5,541,886	4,913,365	-11.3	4.9	2,198,360	1,867,725	-15.0	5.2	8,420,590	7,745,077	-8.0	4.9
12 Chiba	4,030,311	3,461,085	-14.1	3.5	1,225,011	1,029,814	-15.9	2.8	6,487,146	6,476,943	-0.2	4.1
13 Tokyo	6,042,798	4,805,702	-20.5	4.8	2,612,355	2,041,588	-21.8	5.6	8,586,935	6,350,776	-26.0	4.0
14 Kanagawa	7,685,449	6,484,275	-15.6	6.5	2,862,729	2,364,383	-17.4	6.5	12,468,048	10,832,456	-13.1	6.9
15 Niigata	1,991,472	1,882,130	-5.5	1.9	844,265	745,765	-11.7	2.1	2,435,067	2,262,667	-7.1	1.4
16 Toyama	1,472,800	1,556,855	5.7	1.6	575,891	529,448	-8.1	1.5	1,748,150	1,659,668	-5.1	1.1
17 Ishikawa	957,855	915,936	-4.4	0.9	438,470	385,697	-12.0	1.1	1,400,471	1,254,312	-10.4	0.8
18 Fukui	832,160	727,724	-12.6	0.7	360,912	303,771	-15.8	0.8	1,074,050	950,816	-11.5	0.6
19 Yamanashi	1,057,204	810,126	-23.4	0.8	379,664	322,091	-15.2	0.9	1,502,729	1,337,575	-11.0	0.8
20 Nagano	2,762,580	2,117,036	-23.4	2.1	1,067,638	907,057	-15.0	2.5	3,948,528	3,272,797	-17.1	2.1
21 Gifu	2,014,008	1,967,175	-2.3	2.0	877,082	799,198	-8.9	2.2	2,870,154	2,710,349	-5.6	1.7
22 Shizuoka	6,297,741	6,005,051	-4.6	6.0	2,184,135	2,028,695	-7.1	5.6	9,413,899	9,142,535	-2.9	5.8
23 Aichi	10,625,080	11,223,252	5.6	11.2	4,256,253	4,076,442	-4.2	11.3	21,984,819	22,848,498	3.9	14.5
24 Mie	2,713,802	2,703,184	-0.4	2.7	944,656	877,630	-7.1	2.4	4,893,594	4,686,796	-4.2	3.0
25 Shiga	2,580,960	2,411,574	-6.6	2.4	776,987	695,090	-10.5	1.9	3,475,234	3,034,183	-12.7	1.9
26 Kyoto	2,383,507	2,017,152	-15.4	2.0	822,852	713,108	-13.3	2.0	3,068,234	2,200,531	-28.3	1.4
27 Osaka	7,192,332	6,587,088	-8.4	6.6	3,042,212	2,460,768	-19.1	6.8	9,544,663	8,102,366	-15.1	5.1
28 Hyogo	5,435,561	4,641,731	-14.6	4.6	1,949,609	1,690,547	-13.3	4.7	7,548,767	6,958,257	-7.8	4.4
29 Nara	940,874	805,343	-14.4	0.8	358,365	304,565	-15.0	0.8	1,408,441	1,156,047	-17.9	0.7
30 Wakayama	843,550	870,982	3.3	0.9	256,587	206,430	-19.5	0.6	1,155,615	935,325	-19.1	0.6
31 Tottori	379,873	324,898	-14.5	0.3	165,445	134,386	-18.8	0.4	677,661	641,626	-5.3	0.4
32 Shimane	429,168	339,894	-20.8	0.3	185,396	154,524	-16.7	0.4	746,762	620,752	-16.9	0.4
33 Okayama	2,047,306	1,992,490	-2.7	2.0	737,946	666,149	-9.7	1.8	3,768,131	3,911,844	3.8	2.5
34 Hiroshima	2,736,148	2,728,269	-0.3	2.7	1,057,325	938,748	-11.2	2.6	3,963,735	3,935,437	-0.7	2.5
35 Yamaguchi	1,711,246	1,705,004	-0.4	1.7	507,508	458,856	-9.6	1.3	2,670,840	2,984,412	11.7	1.9
36 Tokushima	629,764	748,289	18.8	0.7	234,420	215,455	-8.1	0.6	727,196	688,590	-5.3	0.4
37 Kagawa	698,218	671,777	-3.8	0.7	301,366	265,730	-11.8	0.7	1,227,097	1,193,021	-2.8	0.8
38 Ehime	1,117,105	1,014,186	-9.2	1.0	397,254	341,141	-14.1	0.9	2,031,580	1,918,408	-5.6	1.2
39 Kochi	302,017	256,922	-14.9	0.3	112,153	91,342	-18.6	0.3	293,518	266,061	-9.4	0.2
40 Fukuoka	2,683,241	2,638,301	-1.7	2.6	1,074,224	943,998	-12.1	2.6	4,023,669	4,081,902	1.4	2.6
41 Saga	630,179	569,910	-9.6	0.6	242,660	217,801	-10.2	0.6	901,048	826,038	-8.3	0.5
42 Nagasaki	511,147	436,347	-14.6	0.4	268,198	225,056	-16.1	0.6	858,694	804,963	-6.3	0.5
43 Kumamoto	1,033,618	898,311	-13.1	0.9	372,889	353,470	-5.2	1.0	1,605,978	1,335,093	-16.9	0.8
44 Oita	1,104,538	1,036,596	-6.2	1.0	284,098	258,026	-9.2	0.7	1,663,124	1,676,547	0.8	1.1
45 Miyazaki	491,926	445,828	-9.4	0.4	218,369	192,195	-12.0	0.5	734,196	707,661	-3.6	0.4
46 Kagoshima	824,560	666,041	-19.2	0.7	302,115	262,033	-13.3	0.7	1,040,912	984,468	-5.4	0.6
47 Okinawa	170,607	180,952	6.1	0.2	74,205	69,290	-6.6	0.2	379,915	348,506	-8.3	0.2

Notes: 1. Because of the revision of the Japan Standard Industrial Classification, the classification of 2000 was incorporated into that of 2003.  
Note that figures for 2000 do not always correspond with those in past statistics tables.  
2. Value added for 2000: Establishments with 10 or more employees = Value added; Establishments with less than 10 employees = Gross value added  
Value added for 2003: Establishments with 30 or more employees = Value added; Establishments with less than 30 employees = Gross value added

## II. Trend in Manufacturing Establishments with 10 or more Employees

– Shipment value and value added increased for the first time in three years,  
Value added per employee marked a record high. –

The number of establishments with 10 or more employees (hereinafter referred to as the “number of establishments”) in 2003 was 143,360, a decrease of 2.2% compared to the previous year, down for the second consecutive year. The number of employees was 7,349,539, a decrease of 1.5% id, down for the 12th consecutive year since 1992. The value of shipments of manufactured goods (hereinafter referred to as “shipment value”) was 264.6791 trillion yen, an increase of 1.7% id.; and value added was 93.8800 trillion yen, an increase of 1.3% id. They both increased for the first time in three years (Table II-1, Figure II-1).



**Table II-1: Change in Major Items**  
(Establishments with 10 or more employees)

Year	Number of establishments		Number of employees		Shipment value		Value added	
		Y/Y (%)	(persons)	Y/Y (%)	(100 million yen)	Y/Y (%)	(100 million yen)	Y/Y (%)
1995	174,418	-2.1	9,048,325	-2.1	2,922,796	1.8	1,098,820	3.8
1996	171,201	-1.8	8,903,872	-1.6	2,995,775	2.5	1,121,407	2.1
1997	167,606	-2.1	8,781,972	-1.4	3,096,722	3.4	1,128,015	0.6
(Note 1) 1998	166,905	-5.3	8,606,686	-4.5	2,921,176	-7.0	1,059,131	-7.7
1999	159,346	-4.5	8,258,337	-4.0	2,792,555	-4.4	1,013,726	-4.3
2000	154,723	-2.9	8,073,292	-2.2	2,882,798	3.2	1,037,118	2.3
2001	155,182	0.3	7,908,897	-2.0	2,764,170	-4.1	979,265	-5.6
(Note 2) 2002	146,632	-4.7	7,463,435	-4.3	2,602,587	-4.2	926,879	-2.5
2003	143,360	-2.2	7,349,539	-1.5	2,646,791	1.7	938,800	1.3

Notes: 1. Because of the adjustment of establishments in the 1998 survey, the year-on-year comparison is based on a time series.

2. Because of the revision of the Japan Standard Industrial Classification, the year-on-year comparison for 2002 is calculated by incorporating the classification of 2001.

Based on 2003 Census of Manufactures, the number of establishments with 4 or more employees was 293,911 (up by 1.1% compared to the previous year), the number of employees was 8,228,150 down by 1.1% id.), shipment value was 273.7344 trillion yen (up by 1.6% id.), and value added was 98.6578 trillion yen (up by 1.2% id.).

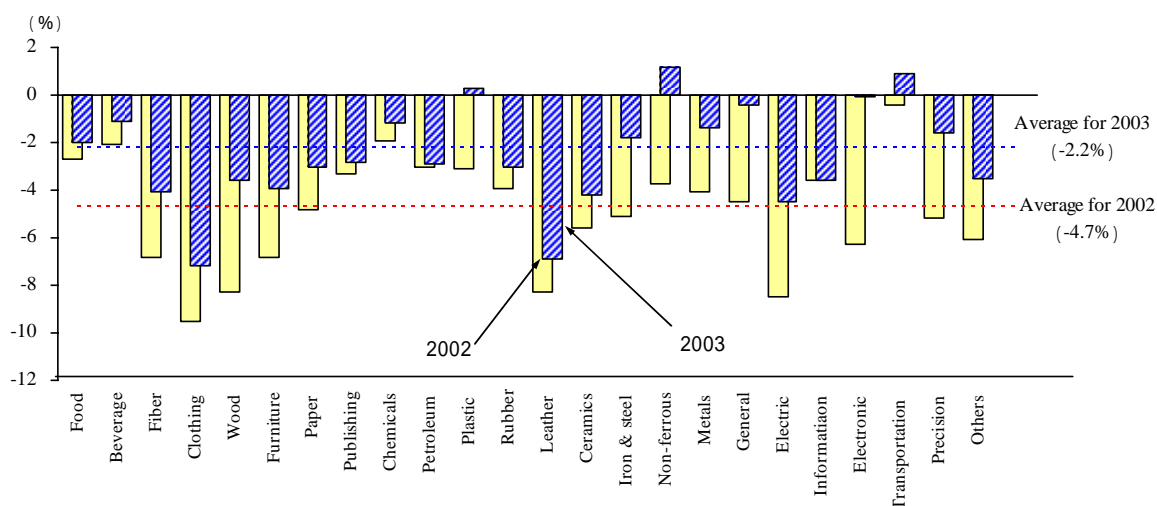
## 1. Situation by industry (Establishments with 10 or more employees)

### (1) Number of establishments – 2nd consecutive decrease –

(i) The number of establishments was 143,360, a decrease of 2.2% compared to the previous year, down for the second consecutive year (Tables II-1 and 2, Figures II-1 and 2).

By industry (Table II-2, Figure II-2), the number of establishments decreased in 21 industries: such as apparel and other finished products (down by 7.2% compared to the previous year), food (down by 2.0% id.), electrical machinery, equipment and supplies (down by 4.5% id.), ceramic, stone and clay products (down by 4.2% id.), printing and allied industries (down by 2.8% id.), and fabricated metal products (down by 1.4% id.). It increased in transportation equipment (up by 0.9% id.), plastic products (up by 0.3% id.), and non-ferrous metals and products (up by 1.2% id.).

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



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

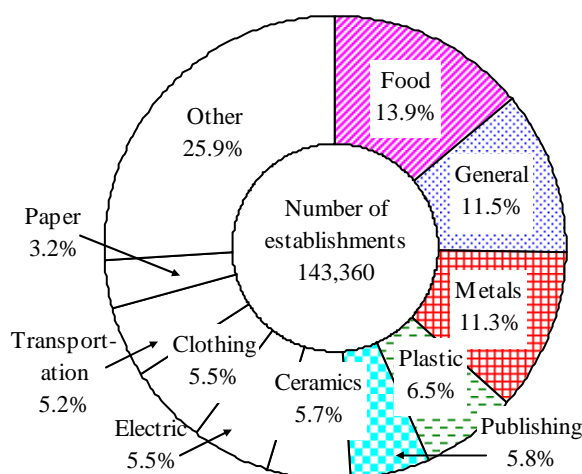
**Table II -2: Number of Establishments by Industry**  
(Establishments with 10 or more employees)

Item  Industry	Number of establishments					
	2002			2003		
	Real number	Y/Y ( % )	Composition ratio ( % )	Real number	Y/Y ( % )	Composition ratio ( % )
00 Total manufactures	146,632	-4.7	100.0	143,360	-2.2	100.0
09 Food	20,405	-2.7	13.9	19,987	-2.0	13.9
10 Beverages, tobacco and feed	2,468	-2.1	1.7	2,440	-1.1	1.7
11 Textile mill products	3,557	-6.8	2.4	3,410	-4.1	2.4
12 Apparel and other finished products	8,431	-9.5	5.7	7,825	-7.2	5.5
13 Lumber and wood products	3,994	-8.3	2.7	3,849	-3.6	2.7
14 Furniture and fixtures	3,296	-6.8	2.2	3,169	-3.9	2.2
15 Pulp, paper and paper products	4,731	-4.8	3.2	4,587	-3.0	3.2
16 Printing and allied industries	8,533	-3.3	5.8	8,293	-2.8	5.8
17 Chemical and allied products	3,949	-1.9	2.7	3,902	-1.2	2.7
18 Petroleum and coal products	419	-3.0	0.3	407	-2.9	0.3
19 Plastic products	9,247	-3.1	6.3	9,271	0.3	6.5
20 Rubber products	1,942	-3.9	1.3	1,884	-3.0	1.3
21 Leather tanning, leather products and fur skins	1,040	-8.3	0.7	968	-6.9	0.7
22 Ceramic, stone and clay products	8,572	-5.6	5.8	8,208	-4.2	5.7
23 Iron and steel	2,927	-5.1	2.0	2,873	-1.8	2.0
24 Non-ferrous metals and products	1,760	-3.7	1.2	1,781	1.2	1.2
25 Fabricated metal products	16,430	-4.1	11.2	16,195	-1.4	11.3
26 General machinery	16,536	-4.5	11.3	16,474	-0.4	11.5
27 Electrical machinery, equipment and supplies	8,280	-8.5	5.6	7,909	-4.5	5.5
28 Information and communication electronics equipment	2,115	-3.6	1.4	2,039	-3.6	1.4
29 Electronic parts and devices	4,230	-6.3	2.9	4,227	-0.1	2.9
30 Transportation equipment	7,392	-0.4	5.0	7,460	0.9	5.2
31 Precision instruments and machinery	2,415	-5.2	1.6	2,377	-1.6	1.7
32 Miscellaneous manufacturing industries	3,963	-6.1	2.7	3,825	-3.5	2.7

Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

(ii) Observing highest number of establishments (Table II-2, Figure II-3), figures exceeded 10% in the food industry (19,987 establishments, composition ratio of 13.9%), the general machinery industry (16,474, 11.5% id.), and the fabricated metal products industry (16,195, 11.3% id.), followed by the plastic products industry (9,271, 6.5% id.), the publishing, printing and allied industries (8,293, 5.8% id.), the ceramic, stone and clay products industry (8,208, 5.7% id.), the electrical machinery, equipment and supplies industry (7,909, 5.5% id.), the apparel and other finished products industry (7,825, 5.5% id.), the transportation equipment industry (7,460, 5.2% id.), and the pulp, paper and paper products industry (4,587, 3.2% id.).

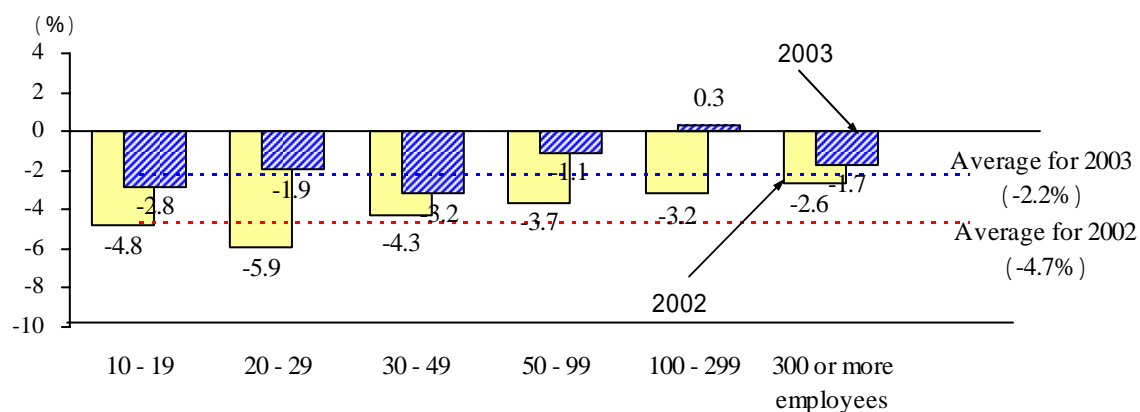
**Figure II-3: Composition Ratio of Number of Establishments by Industry**  
(Establishments with 10 or more employees)





(iii) The number of establishments by size of workforce increased slightly in establishments with 100 to 299 employees (up by 0.3% compared to the previous year). However, it decreased in other classes such as establishments with 10 to 19 employees (down by 2.8% id.), those with 20 to 29 employees (down by 1.9% id.), those with 30 to 29 employees (down by 1.9% id.), and those with 30 to 49 employees (down by 3.2% id.).

**Figure II-4: Year-by-Year Comparison of Number of Establishments by Size of Workforce**  
(Establishments with 10 or more employees)



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

## (2) Number of employees – Continued decrease –

The number of employees was 7,349,539, a decrease of 1.5% compared to the previous year, down for the 12th consecutive year since 1992 (Table II-1, Figure II-1).

(i) When viewing it by industry (Table II-3, Figure II-5), the number of employees decreased in 21 industries out of 24: such as electrical machinery, equipment and supplies (down by 4.8% compared to the previous year), apparel and other finished products (down by 8.5% id.), food (down by 1.3% id.), fabricated metals (down by 2.4% id.), and ceramic, stone and clay products (down by 4.1% id.). However, there were increases in transportation equipment (up by 2.7% id.), plastic products (up by 3.1% id.), and electronic parts and devices (up by 0.9% id.).

**Figure II-5: Year-by-Year Comparison of Number of Employees by Industry**  
(Establishments with 10 or more employees)



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

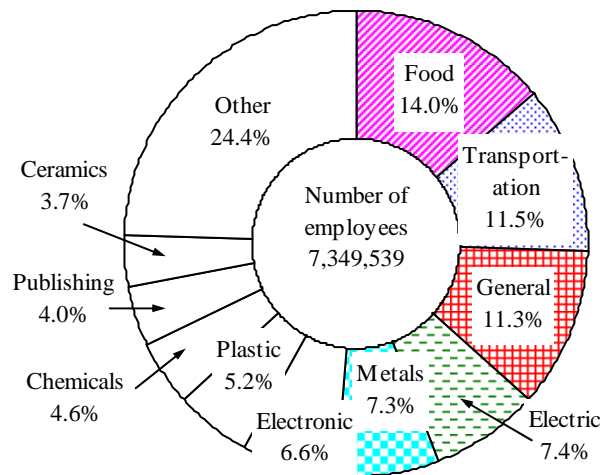
**Table II-3: Number of Employees by Industry**  
(Establishments with 10 or more employees)

Item Industry	Number of employees					
	2002			2003		
	Real number	Y/Y (%)	Composition ratio (%)	Real number	Y/Y (%)	Composition ratio (%)
00 Total manufactures	7,463,435	-4.3	100.0	7,349,539	-1.5	100.0
09 Food	1,044,113	-1.0	14.0	1,030,920	-1.3	14.0
10 Beverages, tobacco and feed	94,619	-1.7	1.3	92,333	-2.4	1.3
11 Textile mill products	122,719	-8.2	1.6	117,034	-4.6	1.6
12 Apparel and other finished products	248,306	-10.4	3.3	227,206	-8.5	3.1
13 Lumber and wood products	99,913	-7.5	1.3	97,383	-2.5	1.3
14 Furniture and fixtures	101,417	-7.7	1.4	96,933	-4.4	1.3
15 Pulp, paper and paper products	202,458	-4.3	2.7	197,561	-2.4	2.7
16 Printing and allied industries	303,109	-3.3	4.1	295,936	-2.4	4.0
17 Chemical and allied products	347,052	-2.8	4.7	337,847	-2.7	4.6
18 Petroleum and coal products	21,169	-4.5	0.3	21,123	-0.2	0.3
19 Plastic products	371,495	-1.8	5.0	382,953	3.1	5.2
20 Rubber products	111,644	-3.0	1.5	110,894	-0.7	1.5
21 Leather tanning, leather products and fur skins	26,130	-8.6	0.4	24,518	-6.2	0.3
22 Ceramic, stone and clay products	280,937	-7.5	3.8	269,538	-4.1	3.7
23 Iron and steel	198,762	-6.4	2.7	196,303	-1.2	2.7
24 Non-ferrous metals and products	125,880	0.6	1.7	122,055	-3.0	1.7
25 Fabricated metal products	547,255	-3.3	7.3	533,986	-2.4	7.3
26 General machinery	835,239	-5.1	11.2	827,178	-1.0	11.3
27 Electrical machinery, equipment and supplies	568,189	-6.8	7.6	540,864	-4.8	7.4
28 Information and communication electronics equipment	226,772	-16.4	3.0	222,773	-1.8	3.0
29 Electronic parts and devices	483,062	-6.5	6.5	487,360	0.9	6.6
30 Transportation equipment	823,833	1.2	11.0	846,131	2.7	11.5
31 Precision instruments and machinery	141,632	-5.8	1.9	140,009	-1.1	1.9
32 Miscellaneous manufacturing industries	137,730	-5.4	1.8	130,701	-5.1	1.8

Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

(ii) By industry (Table II-3, Figure II-6), the number of employees was highest in the food industry (1,030,920 employees, composition ratio of 14.0%), followed by the transportation equipment industry (846,131, 11.5% id.), the general machinery industry (827,178, 11.3% id.), the electrical machinery, equipment and supplies industry (540,864, 7.4% id.), and the fabricated metal products industry (533,986, 7.3% id.). These five industries accounted for more than half of the total. The number of employees was 487,360 (6.6% id.) in the electronic parts and devices industry, 382,953 (5.2%id.) in the plastic products industry, 337,847 (4.6% id.) in the chemical and allied products industry, 295,936 (4.0% id.) in the printing and allied industries, and 269,538 (3.7% id.) in the ceramic, stone and clay products industry. The general machinery industry, which was in the second place in the previous year, was replaced in that position by the transportation equipment industry.

**Figure II-6: Composition Ratio of Number of Employees by Industry**  
(Establishments with 10 or more employees)



### (3) Shipment value – Increase for the first time in three years –

Shipment value was 264.6791 trillion yen, an increase of 1.7% compared to the previous year, up for the first time in three years (Tables II-1, Figures II-1).

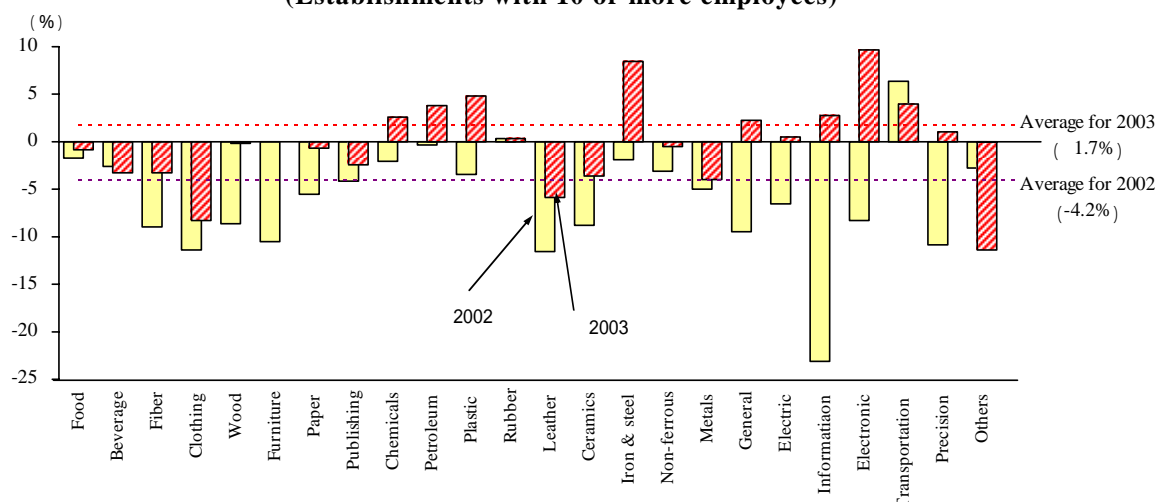
**Table II-4: Shipment Value by Industry  
(Establishments with 10 or more employees)**

Item  Industry	Shipment value					
	2002			2003		
	(million yen)	Y/Y ( % )	Composition ratio ( % )	(million yen)	Y/Y ( % )	Composition ratio ( % )
00 Total manufactures	260,258,709	-4.2	100.0	264,679,070	1.7	100.0
09 Food	22,188,074	-1.8	8.5	21,981,305	-0.9	8.3
10 Beverages, tobacco and feed	10,398,347	-2.5	4.0	10,069,360	-3.2	3.8
11 Textile mill products	2,208,360	-9.0	0.8	2,136,130	-3.3	0.8
12 Apparel and other finished products	2,279,760	-11.3	0.9	2,093,054	-8.2	0.8
13 Lumber and wood products	2,220,235	-8.6	0.9	2,214,858	-0.2	0.8
14 Furniture and fixtures	1,884,930	-10.6	0.7	1,885,222	0.0	0.7
15 Pulp, paper and paper products	6,934,759	-5.6	2.7	6,882,788	-0.7	2.6
16 Printing and allied industries	6,771,507	-4.1	2.6	6,609,366	-2.4	2.5
17 Chemical and allied products	22,570,034	-2.1	8.7	23,148,328	2.6	8.7
18 Petroleum and coal products	9,345,274	-0.3	3.6	9,696,483	3.8	3.7
19 Plastic products	9,153,428	-3.4	3.5	9,600,906	4.9	3.6
20 Rubber products	2,793,348	0.4	1.1	2,803,985	0.4	1.1
21 Leather tanning, leather products and fur skins	439,906	-11.6	0.2	414,582	-5.8	0.2
22 Ceramic, stone and clay products	7,031,971	-8.8	2.7	6,781,056	-3.6	2.6
23 Iron and steel	10,774,878	-1.9	4.1	11,689,380	8.5	4.4
24 Non-ferrous metals and products	5,558,656	-3.1	2.1	5,525,435	-0.6	2.1
25 Fabricated metal products	12,429,638	-5.0	4.8	11,936,932	-4.0	4.5
26 General machinery	24,266,141	-9.5	9.3	24,815,090	2.3	9.4
27 Electrical machinery, equipment and supplies	17,486,140	-6.6	6.7	17,596,923	0.6	6.6
28 Information and communication electronics equipment	12,329,788	-23.1	4.7	12,658,601	2.7	4.8
29 Electronic parts and devices	15,798,820	-8.3	6.1	17,322,855	9.6	6.5
30 Transportation equipment	47,702,905	6.4	18.3	49,572,518	3.9	18.7
31 Precision instruments and machinery	3,426,759	-10.9	1.3	3,462,628	1.0	1.3
32 Miscellaneous manufacturing industries	4,265,049	-2.8	1.6	3,781,284	-11.3	1.4

Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

(i) By industry (Table II-4, Figure II-7), shipment value increased in transportation equipment (an increase of 3.9% compared to the previous year, up for the fourth consecutive year), electronic parts and devices (up by 9.6% id.), iron and steel (up by 8.5% id.), chemical and allied products (up by 2.6% id.), general machinery (up by 2.3% id.), plastic products (up by 4.9% id.), petroleum and coal products (up by 3.8% id.), and information and communication electronics equipment (up by 2.7% id.). In contrast, it continued to decrease in 12 industries: such as miscellaneous manufacturing industries (down by 11.3% id.), fabricated metals (down by 4.0% id.), beverages, tobacco, and feed (down by 3.2% id.), food (down by 0.9% id.), ceramic, stone and clay products (down by 3.6% id.), apparel and other finished products (down by 8.2% id.), and printing and allied industries (down by 2.4% id.). It leveled off at 0.0% id. in furniture and fixtures.

**Figure II-7: Year-by-Year Comparison of Shipment Value by Industry**  
(Establishments with 10 or more employees)



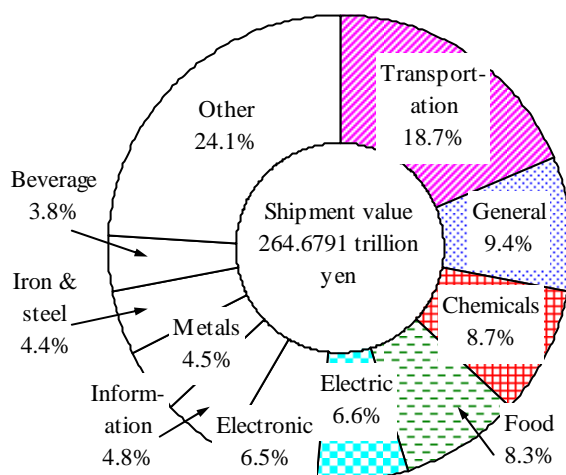
Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

Regarding the industries where shipment value increased, in the transportation equipment industry, shipment value increased due to increases both for ordinary passenger cars and automobile parts for domestic use and exports, increased demand for new trucks accompanied with introduction of the NOx/PM Act and regulations for diesel cars, and increased domestic and international orders for tankers. In the electronic parts and devices industry, although there were decreases in the areas of cathode-ray tubes and switching power sources, there were increases for liquid crystal elements for digital cameras, cellular telephones, personal computers, and liquid crystal TVs, and for semiconductor integrated circuits for digital cameras, and cellular telephones. In the iron and steel industry, strong demand for industrial machinery and automobiles contributed to increase. In the chemical and allied products industry, although there were decreases in agricultural chemicals and synthetic fibers, increases in medical products preparations and industrial organic chemicals mainly for exports contributed to increase. In the general machinery industry, exports of shovel excavators mainly to North America and China were brisk and domestic demand for renewal of those for lease and rental purposes was favorable. Semiconductor manufacturing equipment shipments also increased domestically and internationally due to favorable conditions of cellular telephones and digital appliances.

Regarding industries where shipment value decreased, shipment value in miscellaneous manufacturing industries decreased due to declines for household TV games and electronic toys using integrated circuits caused by an overseas production shift, although there were increases for safety protectors and life saving apparatus including safety belts, and unit housing that is energy saving and highly durable. In the fabricated metal products industry, shipment value decreased due to decreases for steelworks and bridges caused by a decline in public works.

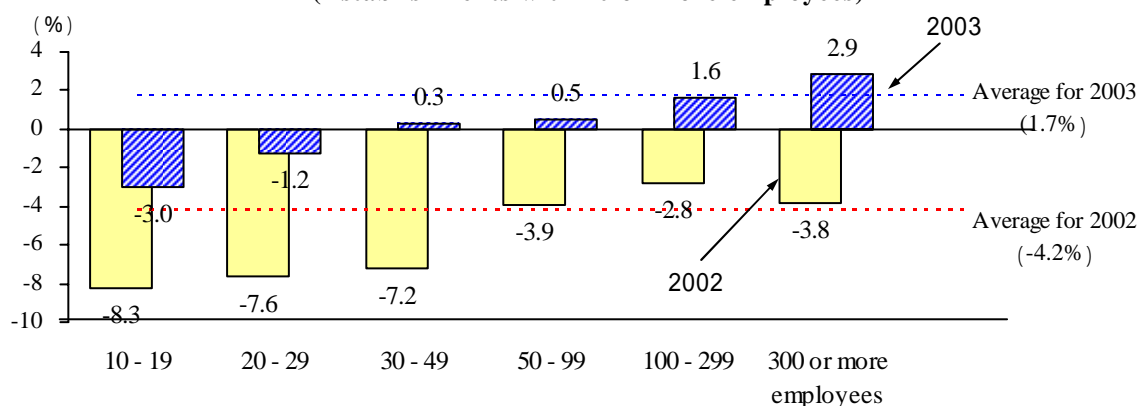
(ii) By industry (Table II-4, Figure II-8), shipment value was highest in the transportation equipment industry (49.5725 trillion yen, composition ratio of 18.7%), accounting for nearly 20%, followed by the general machinery industry (24.8151 trillion yen, 9.4% id.), the chemical and allied products industry (23.1483 trillion yen, 8.7% id.), the food industry (21.9813 trillion yen, 8.3% id.), and the electrical machinery, equipment and supplies industry (17.5969 trillion yen, 6.6% id.). The top 5 industries were ranked similarly to the previous year. Shipment value was 17.3229 trillion yen (6.5% id.) in the electronic parts and devices industry, 12.6586 trillion yen (4.8% id.) in the information and communication electronics equipment industry, 11.9369 trillion yen (4.5% id.) in the fabricated metal products industry, 11.6894 trillion yen (4.4% id.) in the iron and steel industry and 10.0694 trillion yen (3.8% id.) in the beverages, tobacco, and feed industry.

**Figure II-8: Composition Ratio of Shipment Value by Industry**  
(Establishments with 10 or more employees)



(iii) When viewing shipment value by size of workforce (Figure II-9), it increased in all establishments with more than 30 employees. The larger the size of workforce was, the larger the range of increase. However, it continued to decrease in establishments with 10 to 19 employees (down by 3.0% compared to the previous year) and those with 20 to 29 employees (down by 1.2% id.).

**Figure II-9: Year-by-Year Comparison of Shipment Value by Scale of Workforce**  
(Establishments with 10 or more employees)



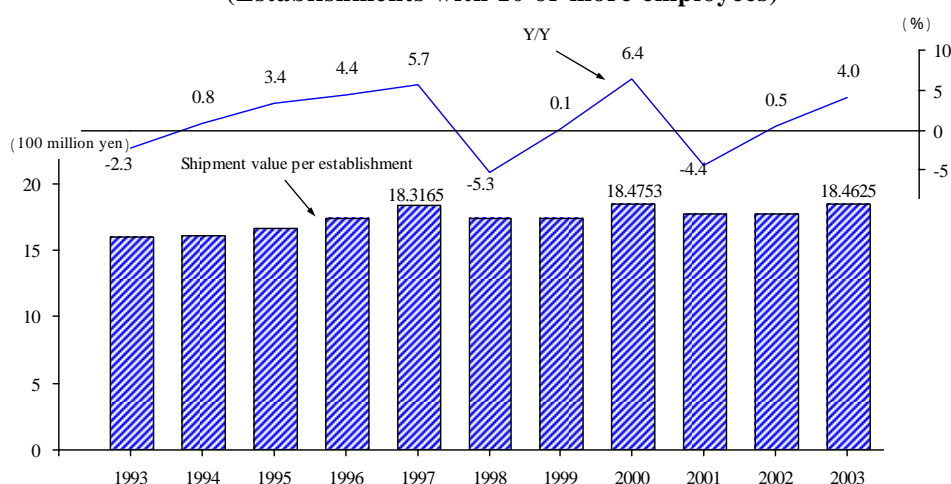
Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

(iv) Shipment value per establishment was 1846.25 million yen, an increase of 4.0% compared to the previous year, up for the second consecutive year. This was the second highest, following a record high in 2000 (1847.53 million yen) (Table II-5, Figure II-10).

Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, past figures have been recalculated.

By industry (Table II-5), shipment value increased in 19 industries: such as iron and steel (up by 10.5% compared to the previous year), electronic parts and devices (up by 9.7% id.), petroleum and coal products (up by 6.8% id.), information and communication electronics equipment (up by 6.5% id.), and electrical machinery, equipment and supplies (up by 5.4% id.), while it decreased in 5 industries: miscellaneous manufacturing industries (down by 8.1% id.), fabricated metal products (down by 2.6% id.), beverages, tobacco and feed (down by 2.1% id.), non-ferrous metals and products (down by 1.8% id.) and apparel and other finished products (down by 1.1% id.).

**Figure II-10: Change in Shipment Value per Establishment**  
(Establishments with 10 or more employees)



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, past figures have been recalculated.

**Table II-5: Shipment Value per Establishment by Industry**  
(Establishments with 10 or more employees)

Industry	Item	2002	2003	
		( 10,000 yen )	( 10,000 yen )	Y/Y ( % )
00 Total manufactures		177,491	184,625	4.0
09 Food		108,738	109,978	1.1
10 Beverages, tobacco and feed		421,327	412,679	-2.1
11 Textile mill products		62,085	62,643	0.9
12 Apparel and other finished products		27,040	26,748	-1.1
13 Lumber and wood products		55,589	57,544	3.5
14 Furniture and fixtures		57,188	59,489	4.0
15 Pulp, paper and paper products		146,581	150,050	2.4
16 Printing and allied industries		79,357	79,698	0.4
17 Chemical and allied products		571,538	593,243	3.8
18 Petroleum and coal products		2,230,376	2,382,428	6.8
19 Plastic products		98,988	103,558	4.6
20 Rubber products		143,839	148,831	3.5
21 Leather tanning, leather products and fur skins		42,299	42,829	1.3
22 Ceramic, stone and clay products		82,034	82,615	0.7
23 Iron and steel		368,120	406,870	10.5
24 Non-ferrous metals and products		315,833	310,243	-1.8
25 Fabricated metal products		75,652	73,708	-2.6
26 General machinery		146,747	150,632	2.6
27 Electrical machinery, equipment and supplies		211,185	222,492	5.4
28 Information and communication electronics equipment		582,969	620,824	6.5
29 Electronic parts and devices		373,495	409,814	9.7
30 Transportation equipment		645,332	664,511	3.0
31 Precision instruments and machinery		141,895	145,672	2.7
32 Miscellaneous manufacturing industries		107,622	98,857	-8.1

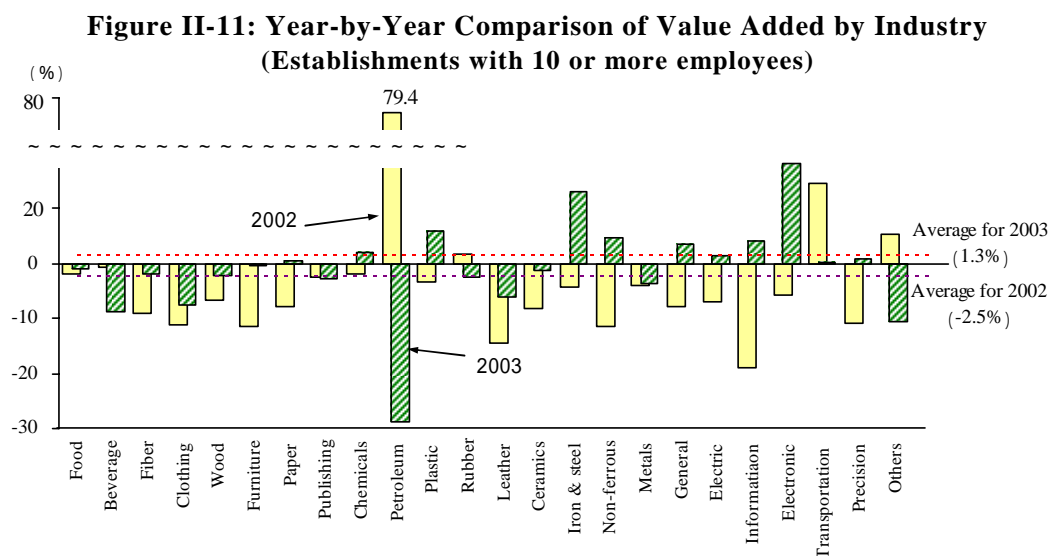


#### (4) Value added – Increase for the first time in three years –

Value added was 93.8800 trillion yen, an increased of 1.3% compared to the previous year, up for the first time in three years. However, it has remained below 100 trillion yen since 2001 (Tables II-1, Figures II-1).

(i) By industry (Table II-6, Figure II-11), value added increased in 11 industries: such as electronic parts and devices (up by 18.2% compared to the previous year), iron and steel (up by 12.9% id.), general machinery (up by 3.3% id.), plastic products (up by 5.7% id.), and chemical and allied products (up by 1.8% id.), and decreased in 13 industries: such as beverages, tobacco and feed (down by 8.7% id.), petroleum and coal products (down by 28.8% id.), fabricated metal products (down by 3.6% id.), miscellaneous manufacturing industries (down by 10.7% id.), printing and allied industries (down by 2.7% id.), and food (down by 1.0% id.).

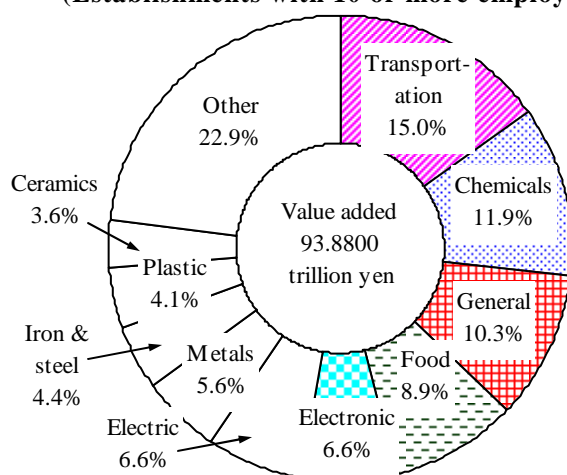
Regarding industries where value added increased, in the electronic parts and devices industry, shipments were favorable for digital cameras and cellular telephones, and in the iron and steel industry, shipment value for industrial machinery and automobiles increased. Both industries showed an increase for the first time in three years. In contrast, the beverages, tobacco and feed industry showed a decrease due to a declining demand for tobacco and beer caused by a cool summer. The petroleum and coal industry also showed a decrease due to the price increase for crude petroleum.



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001

(ii) Observing industries with high value added (Table II-6, Figure II-12), value added was highest in the transportation equipment industry (14.0916 trillion yen, composition ratio of 15.0%), followed by the chemical and allied products industry (11.1462 trillion yen, 11.9% id.), and the general machinery industry (9.6363 trillion yen, 10.3% id.). These three industries accounted for more than 10% respectively. Value added was 8.3457 trillion yen (8.9% id.) in the food industry, 6.2373 trillion yen (6.6% id.) in the electronic parts and devices industry, 6.1657 trillion yen (6.6% id.) in the electrical machinery, equipment and supplies industry, 5.2552 trillion yen (5.6% id.) in the fabricated metal products industry, and 4.1726 trillion yen (4.4% id.) in the iron and steel industry.

**Figure II-12: Composition Ratio of Value Added by Industry**  
(Establishments with 10 or more employees)



**Table II-6: Value Added by Industry**  
(Establishments with 10 or more employees)

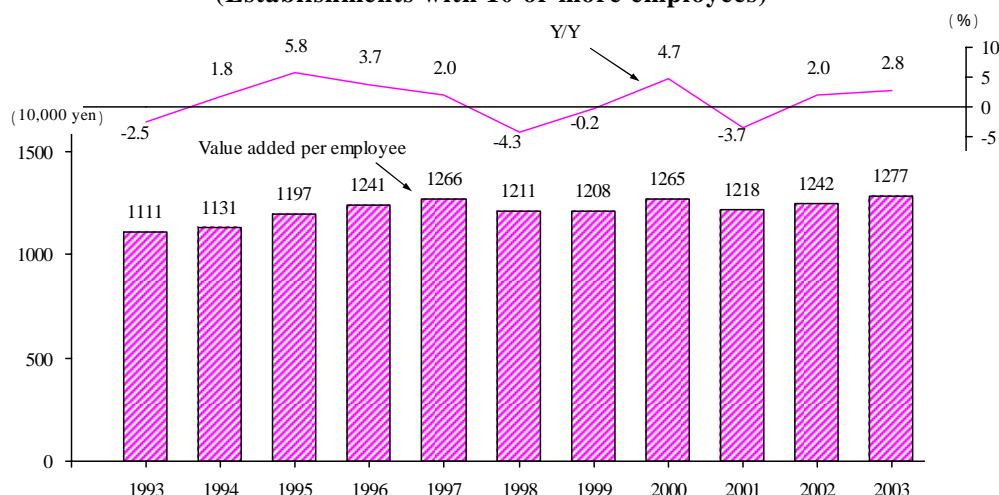
Item	Value added					
	2002			2003		
	(million yen)	Y/Y (%)	Composition ratio (%)	(million yen)	Y/Y (%)	Composition ratio (%)
Industry						
00 Total manufactures	92,687,916	-2.5	100.0	93,879,979	1.3	100.0
09 Food	8,431,364	-2.0	9.1	8,345,742	-1.0	8.9
10 Beverages, tobacco and feed	3,255,092	-0.8	3.5	2,972,912	-8.7	3.2
11 Textile mill products	936,281	-9.2	1.0	919,325	-1.8	1.0
12 Apparel and other finished products	1,064,233	-11.3	1.1	982,777	-7.7	1.0
13 Lumber and wood products	822,408	-6.7	0.9	803,386	-2.3	0.9
14 Furniture and fixtures	796,821	-11.6	0.9	793,052	-0.5	0.8
15 Pulp, paper and paper products	2,544,055	-7.8	2.7	2,552,076	0.3	2.7
16 Printing and allied industries	3,086,160	-2.6	3.3	3,003,050	-2.7	3.2
17 Chemical and allied products	10,951,842	-2.0	11.8	11,146,162	1.8	11.9
18 Petroleum and coal products	832,465	79.4	0.9	592,567	-28.8	0.6
19 Plastic products	3,663,386	-3.3	4.0	3,873,526	5.7	4.1
20 Rubber products	1,319,161	1.6	1.4	1,287,893	-2.4	1.4
21 Leather tanning, leather products and fur skins	167,470	-14.6	0.2	157,089	-6.2	0.2
22 Ceramic, stone and clay products	3,451,265	-8.2	3.7	3,410,547	-1.2	3.6
23 Iron and steel	3,696,068	-4.2	4.0	4,172,628	12.9	4.4
24 Non-ferrous metals and products	1,423,865	-11.6	1.5	1,487,589	4.5	1.6
25 Fabricated metal products	5,449,437	-4.1	5.9	5,255,166	-3.6	5.6
26 General machinery	9,325,794	-7.8	10.1	9,636,307	3.3	10.3
27 Electrical machinery, equipment and supplies	6,091,157	-7.0	6.6	6,165,697	1.2	6.6
28 Information and communication electronics equipment	2,972,191	-19.0	3.2	3,088,907	3.9	3.3
29 Electronic parts and devices	5,275,727	-5.8	5.7	6,237,261	18.2	6.6
30 Transportation equipment	14,066,920	14.5	15.2	14,091,576	0.2	15.0
31 Precision instruments and machinery	1,473,126	-10.9	1.6	1,483,653	0.7	1.6
32 Miscellaneous manufacturing industries	1,591,629	5.3	1.7	1,421,092	-10.7	1.5

Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001

(iii) The average value added per employee in all manufacturing industries was 12.77 million yen, an increase of 2.8% compared to the previous year, up for the second consecutive year, marking the highest level<sup>(Note)</sup> (Table II-7, Figure II-13).

Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, past figures have been recalculated.

**Figure II-13: Change in Value Added per Employee  
(Establishments with 10 or more employees)**



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, past figures have been recalculated.

By industry (Figure II-7), average value added per employee increased in 16 industries: such as electronic parts and devices (up by 16.9% compared to the previous year), iron and steel (up by 14.5% id.), non-ferrous metals and products (up by 7.3% id.), electrical machinery, equipment and supplies (up by 6.3% id.), information and communication electronics equipment (up by 5.8% id.), chemicals and allied products (up by 4.5% id.), and decreased in 8 industries: such as petroleum and coal products (down by 29.2% id.), beverages, tobacco and feed (down by 6.3% id.), miscellaneous manufacturing industries (down by 6.0% id.), rubber products (down by 1.8% id.), and transportation equipment (down by 1.5% id.).

**Table II-7: Value Added per Employee by Industry  
(Establishments with 10 or more employees)**

Item Industry	2002	2003	
	( 10,000 yen )	( 10,000 yen )	Y/Y ( % )
00 Total manufactures	1,242	1,277	2.8
09 Food	808	810	0.2
10 Beverages, tobacco and feed	3,440	3,220	-6.4
11 Textile mill products	763	786	3.0
12 Apparel and other finished products	429	433	0.9
13 Lumber and wood products	823	825	0.2
14 Furniture and fixtures	786	818	4.1
15 Pulp, paper and paper products	1,257	1,292	2.8
16 Printing and allied industries	1,018	1,015	-0.3
17 Chemical and allied products	3,156	3,299	4.5
18 Petroleum and coal products	3,932	2,805	-28.7
19 Plastic products	986	1,011	2.5
20 Rubber products	1,182	1,161	-1.8
21 Leather tanning, leather products and fur skins	641	641	0.0
22 Ceramic, stone and clay products	1,228	1,265	3.0
23 Iron and steel	1,860	2,126	14.3
24 Non-ferrous metals and products	1,131	1,219	7.8
25 Fabricated metal products	996	984	-1.2
26 General machinery	1,117	1,165	4.3
27 Electrical machinery, equipment and supplies	1,072	1,140	6.3
28 Information and communication electronics equipment	1,311	1,387	5.8
29 Electronic parts and devices	1,092	1,280	17.2
30 Transportation equipment	1,707	1,665	-2.5
31 Precision instruments and machinery	1,040	1,060	1.9
32 Miscellaneous manufacturing industries	1,156	1,087	-6.0

## (5) Year-end inventory (establishments with 30 or more employees)

### – 6th consecutive decrease –

The value of manufactured goods inventory and the value of semi-manufactured goods and work in progress was 17.4233 trillion yen, a decrease of 3.2% compared to the end of the previous year, down for the sixth consecutive year. (Table II-8)

**Table II-8: Change in Value of Manufactured Goods Inventory,  
Value of Semi-manufactured Goods and Work in Progress  
(Establishments with 30 or more employees)**

Item Year	Value of manufactured goods inventory and value of semi-manufactured goods and work in progress					
			Value of manufactured goods inventory		Value of semi-manufactured goods and work in progress	
	(100 million yen)	Y/Y ( % )	(100 million yen)	Y/Y ( % )	(100 million yen)	Y/Y ( % )
The end of 1995	219,395	2.9	92,672	2.8	126,723	3.0
The end of 1996	223,602	1.9	93,236	0.6	130,367	2.9
The end of 1997	231,791	3.7	96,812	3.8	134,980	3.5
The end of 1998	229,951	-1.3	94,610	-3.0	135,342	-0.2
The end of 1999	212,432	-7.6	84,999	-10.2	127,433	-5.8
The end of 2000	206,619	-2.7	82,377	-3.1	124,242	-2.5
The end of 2001	196,443	-4.9	82,016	-0.4	114,427	-7.9
The end of 2002	180,054	-7.3	73,118	-8.9	106,936	-6.2
The end of 2003	174,233	-3.2	71,180	-2.7	103,053	-3.6

Notes: 1. Because of the adjustment of establishments in the 1998 survey, the year-on-year comparisons are based on a time series.  
2. Because of the revision of the Japan Standard Industrial Classification, the year-on-year comparisons for 2002 are calculated by incorporating the classification of 2001.

When viewing value of inventory by type of inventory:

(i) Value of manufactured goods inventory was 7.1180 trillion yen, a decrease of 2.7% compared to the end of the previous year, down for the sixth consecutive year.

By industry, the value increased in 4 industries of petroleum and coal products (up by 11.3 % compared to the end of the previous year), transportation equipment (up by 5.4% id.), iron and steel (up by 0.3% id.), and plastic products (up by 0.2% id.). However, it decreased in 20 industries: such as information and communication electronics equipment (down by 14.8% id.), fabricated metal products and miscellaneous manufacturing industries (down by 10.9% id. respectively), general machinery (down by 7.1% id.), and ceramic, stone and clay products (down by 6.6% id.).

(ii) Value of semi-manufactured goods and work in progress was 10.3053 trillion yen, a decrease of 3.6% compared to the end of the previous year, down for the sixth consecutive year.

By industry, the value decreased in 16 industries: such as miscellaneous manufacturing industries (down by 57.7% id.), beverages, tobacco and feed (down by 18.2% id.), apparel and other finished products (down by 14.4% id.), leather tanning, leather products and fur skins (down by 13.7% id.), and fabricated metal products (down by 12.9% id.), and increased in 7 industries: such as plastic products (up by 8.4% id.), lumber and wood products (up by 5.2% id.), iron and steel (up by 3.9% id.), transportation equipment (up by 3.9% id.), rubber products (up by 3.4% id.). It leveled off in chemical and allied products (0.0% id.). Miscellaneous manufacturing industries saw a significant decrease because the industrial rating shifted from miscellaneous manufacturing industries to the transportation equipment industry and the information and communication electronics equipment industry due to a decrease in the weapons area.

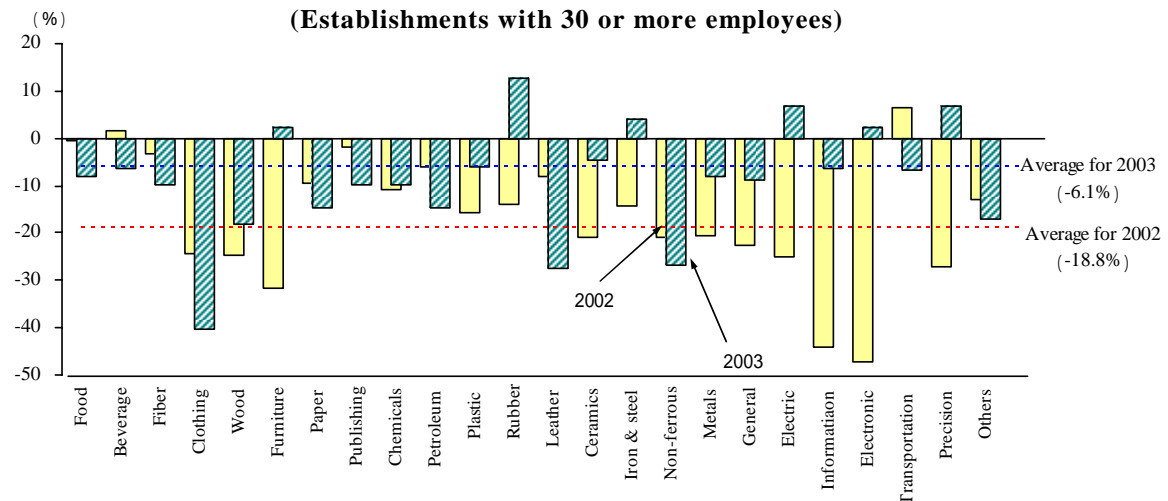
**(6) Total tangible fixed asset investment (including change in temporary construction account) (establishments with 30 or more employees)**

**– 2nd consecutive decrease –**

The total tangible fixed assets invested (including change in temporary construction account) was 8.9249 trillion yen, a decrease of 6.1% compared to the previous year, shown for the second consecutive year.

By industry (Figure II-14), the total amount decreased in 18 industries: such as non-ferrous metals and products (down by 26.9% compared to the previous year), chemical and allied products (down by 9.9% id.), transportation equipment (down by 6.6% id.), general machinery (down by 8.8% id.), and pulp, paper and paper products (down by 14.5% id.), and increased in 6 industries: such as electrical machinery, equipment and supplies (up by 6.8% id.), electronic parts and devices (up by 2.2% id.), iron and steel (up by 4.1% id.), rubber products (up by 12.7% id.) and precision instruments and machinery (up by 6.8% id.).

**Figure II-14: Year-by-Year Comparison of Total Tangible Fixed Asset Investment by Industry  
(Establishments with 30 or more employees)**



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001

**(7) Value of lease contracts and payments (establishments with 30 or more employees)**

**– Total value of lease payments decreased for the third consecutive year -**

The total value of lease contracts was 0.9957 trillion yen, a decrease of 4.6% compared to the previous year, down for the first time in two years. The total value of lease payments was 1.3286 trillion yen, a decrease of 0.7% id., down for the third consecutive year (Table II-9).

(i) The value of lease contracts decreased in 14 industries: such as electronics parts and devices (down by 26.2% compared to the previous year), food (down by 11.9% id.), general machinery (down by 7.8% id.), chemical and allied products (down by 15.5% id.), and non-ferrous metals and products (down by 36.6% id.), and increased in 10 industries: such as transportation equipment (up by 16.0% id.), information and communication electronics equipment (up by 59.1% id.), beverages, tobacco and feed (up by 108.7% id.), electrical machinery, equipment and supplies (up by 13.7% id.), and miscellaneous manufacturing industries (up by 32.5%).

(ii) The value of lease contracts was highest in the electronics parts and devices industry (composition ratio of 22.5%), followed by the transportation equipment industry (18.1% id.), the general machinery industry (8.6% id.), the electrical machinery, equipment and supplies industry (7.8% id.), the food industry (7.2% id.), the plastic products industry (5.0% id.), the publishing, printing and allied industries (4.1% id.), and the information and communication electronics equipment industry (4.1%). The top two industries accounted for nearly 40% of the total.

(iii) The value of lease payments decreased in 15 industries: such as fabricated metal products (down by 10.2% compared to the previous year), publishing, printing and allied industries (down by 5.7% id.), electrical machinery, equipment and supplies (down by 5.1% id.), food (down by 3.2% id.), and furniture and fixtures (down by 18.2% id.), and increased in 9 industries: such as electronics parts and devices (up by 2.6% id.), plastic products (up by 5.9% id.), chemical and allied products (up by 5.9% id.), transportation equipment (up by 1.6% id.), non-ferrous metals and products (up by 6.5% id.), and iron and steel (up by 4.0%).

(iv) The value of lease payments was highest in the electronics parts and devices industry (composition ratio of 19.4%), followed by the transportation equipment industry (15.5% id.), the general machinery industry (9.7%), the food industry (8.5% id.), the electrical machinery, equipment and supplies industry (6.0% id.), the publishing, printing and allied industries (5.2% id.) and the plastic products industry (5.1% id.). The top two industries accounted for 35% of the total.

**Table II-9: Value of Lease Contracts and Payments by Industry**  
**(Establishments with 30 or more employees)**

Item  Industry	Value of lease contracts				Value of lease payments			
	2002	2003	Y/Y ( % )	Composition ratio ( % )	2002	2003	Y/Y ( % )	Composition ratio ( % )
	(100 million yen)	(100 million yen)			(100 million yen)	(100 million yen)		
00 Total manufactures	10,439	9,957	-4.6	100.0	13,376	13,286	-0.7	100.0
09 Food	819	721	-11.9	7.2	1,172	1,135	-3.2	8.5
10 Beverages, tobacco and feed	110	229	108.7	2.3	258	244	-5.1	1.8
11 Textile mill products	55	42	-23.9	0.4	111	103	-6.8	0.8
12 Apparel and other finished products	38	39	2.6	0.4	96	81	-16.1	0.6
13 Lumber and wood products	51	51	-0.3	0.5	103	97	-5.6	0.7
14 Furniture and fixtures	64	36	-43.5	0.4	132	108	-18.2	0.8
15 Pulp, paper and paper products	171	171	-0.2	1.7	338	321	-5.2	2.4
16 Printing and allied industries	427	411	-3.8	4.1	735	693	-5.7	5.2
17 Chemical and allied products	455	384	-15.5	3.9	552	584	5.9	4.4
18 Petroleum and coal products	41	37	-10.3	0.4	25	30	18.3	0.2
19 Plastic products	473	495	4.8	5.0	641	679	5.9	5.1
20 Rubber products	39	51	29.8	0.5	93	90	-3.2	0.7
21 Leather tanning, leather products and fur skins	3	2	-24.1	0.0	9	7	-22.8	0.1
22 Ceramic, stone and clay products	323	310	-4.1	3.1	312	314	0.6	2.4
23 Iron and steel	231	230	-0.3	2.3	411	427	4.0	3.2
24 Non-ferrous metals and products	181	115	-36.6	1.2	249	265	6.5	2.0
25 Fabricated metal products	295	314	6.4	3.2	590	529	-10.2	4.0
26 General machinery	925	852	-7.8	8.6	1,307	1,289	-1.4	9.7
27 Electrical machinery, equipment and supplies	685	779	13.7	7.8	847	804	-5.1	6.0
28 Information and communication electronics equipment	256	408	59.1	4.1	479	494	3.2	3.7
29 Electronic parts and devices	3,036	2,239	-26.2	22.5	2,512	2,576	2.6	19.4
30 Transportation equipment	1,556	1,804	16.0	18.1	2,030	2,063	1.6	15.5
31 Precision instruments and machinery	126	128	1.9	1.3	219	209	-4.2	1.6
32 Miscellaneous manufacturing industries	82	109	32.5	1.1	158	144	-8.9	1.1



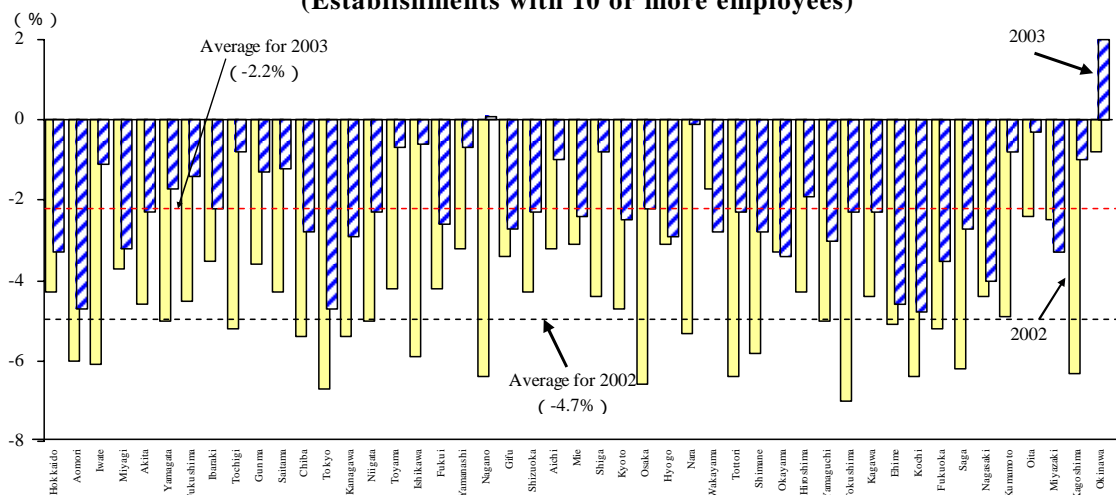
### III. Situation by prefecture (Establishments with 10 or more employees)

#### (1) Number of establishments – Decreased in all prefectures except Okinawa and Nagano –

The number of establishments was 143,360, a decrease of 2.2% compared to the previous year (Table II-10).

(i) By prefecture (Figure II-15), despite increases in Okinawa (up by 2.0% compared to the previous year), and Nagano (up by 0.1% id.), the number of employees decreased in other prefectures such as Kochi (down by 4.8% id.), Aomori (down by 4.7% id.), Tokyo (down by 4.7% id.), Aichi (down by 4.6% id.), Nagasaki (down by 4.0% id.), Fukuoka (down by 3.5% id.), Okayama (down by 3.4% id.), Hokkaido (down by 3.3% id.), and Miyazaki (down by 3.3% id.)

**Figure II-15: Year-by-Year Comparison of the Number of Establishments by Prefecture**  
(Establishments with 10 or more employees)



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

(ii) The number of establishments was highest (Table II-10) in Osaka (11,522 establishments, composition ratio of 8.0%), followed by Aichi (11,257, 7.9% id.), Tokyo (8,502, 5.9% id.), Saitama (7,935, 5.5% id.), Shizuoka (7,039, 4.9% id.), Kanagawa (6,010, 4.2% id.), Hyogo (5,863, 4.1% id.), and Hokkaido (4,274, 3.0% id.).

**Table II-10: Number of Establishments by Prefecture**  
(Establishments with 10 or more employees)

<div><div></div><div>Item</div></div>	2002	2003		<div><div></div><div>Item</div></div>	2002	2003			
		Y/Y ( % )	Composition ratio ( % )			Y/Y ( % )	Composition ratio ( % )		
Prefecture				Prefecture					
Total	146,632	143,360	-2.2	100.0	24 Mie	2,838	2,770	-2.4	1.9
1 Hokkaido	4,422	4,274	-3.3	3.0	25 Shiga	2,000	1,983	-0.8	1.4
2 Aomori	1,251	1,192	-4.7	0.8	26 Kyoto	2,957	2,883	-2.5	2.0
3 Iwate	1,813	1,793	-1.1	1.3	27 Osaka	11,781	11,522	-2.2	8.0
4 Miyagi	2,337	2,263	-3.2	1.6	28 Hyogo	6,035	5,863	-2.9	4.1
5 Akita	1,592	1,555	-2.3	1.1	29 Nara	1,372	1,371	-0.1	1.0
6 Yamagata	1,997	1,963	-1.7	1.4	30 Wakayama	1,237	1,202	-2.8	0.8
7 Fukushima	3,122	3,079	-1.4	2.1	31 Tottori	734	717	-2.3	0.5
8 Ibaraki	4,092	4,000	-2.2	2.8	32 Shimane	955	928	-2.8	0.6
9 Tochigi	3,100	3,076	-0.8	2.1	33 Okayama	2,675	2,583	-3.4	1.8
10 Gunma	3,718	3,668	-1.3	2.6	34 Hiroshima	3,591	3,523	-1.9	2.5
11 Saitama	8,033	7,935	-1.2	5.5	35 Yamaguchi	1,493	1,448	-3.0	1.0
12 Chiba	3,942	3,832	-2.8	2.7	36 Tokushima	1,009	986	-2.3	0.7
13 Tokyo	8,925	8,502	-4.7	5.9	37 Kagawa	1,417	1,384	-2.3	1.0
14 Kanagawa	6,189	6,010	-2.9	4.2	38 Ehime	1,730	1,650	-4.6	1.2
15 Niigata	4,020	3,927	-2.3	2.7	39 Kochi	730	695	-4.8	0.5
16 Toyama	2,079	2,064	-0.7	1.4	40 Fukuoka	4,137	3,992	-3.5	2.8
17 Ishikawa	1,870	1,859	-0.6	1.3	41 Saga	1,030	1,002	-2.7	0.7
18 Fukui	1,568	1,528	-2.6	1.1	42 Nagasaki	1,187	1,140	-4.0	0.8
19 Yamanashi	1,364	1,354	-0.7	0.9	43 Kumamoto	1,579	1,566	-0.8	1.1
20 Nagano	3,706	3,711	0.1	2.6	44 Oita	1,156	1,153	-0.3	0.8
21 Gifu	4,079	3,968	-2.7	2.8	45 Miyazaki	1,121	1,084	-3.3	0.8
22 Shizuoka	7,207	7,039	-2.3	4.9	46 Kagoshima	1,459	1,445	-1.0	1.0
23 Aichi	11,374	11,257	-1.0	7.9	47 Okinawa	609	621	2.0	0.4

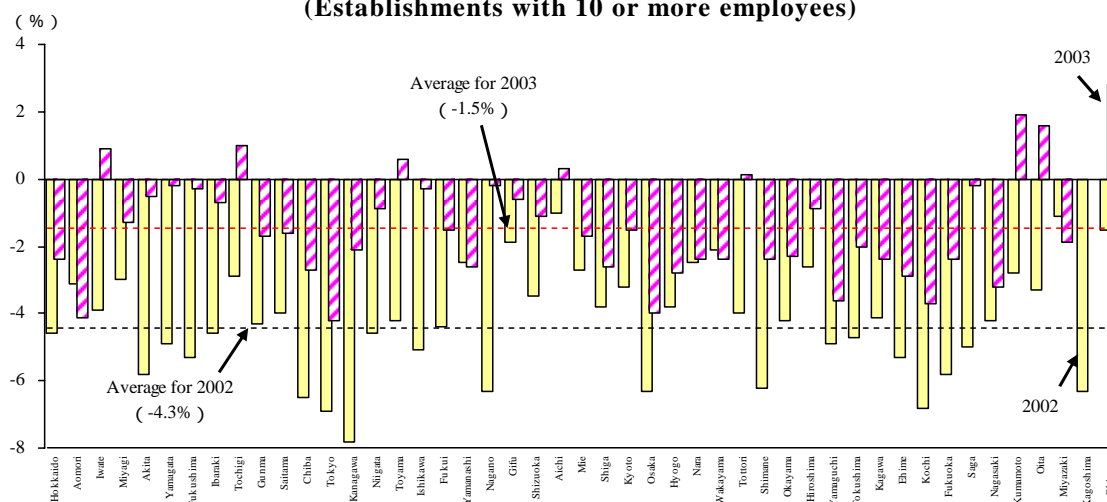
## (2) Number of employees

– Decrease in 38 prefectures, increase in 8 prefectures and virtually flat in one prefecture –

The number of employees was 7,349,539, a decrease of 1.5% compared to the previous year (Table II-11).

- (i) By prefecture (Figure II-16), the number of employees decreased in 38 prefectures: such as Tokyo (down by 4.2% compared to the previous year), Aomori (down by 4.1% id.), Osaka (down by 4.0% id.), Kochi (down by 3.7% id.), Yamaguchi (down by 3.6% id.), Nagasaki (down by 3.2% id.), and Aichi (down by 2.9% id.), and increased in 8 prefectures: such as Okinawa (up by 2.8% id.), Kumamoto (up by 1.9% id.), Oita (up by 1.6% id.), and Tochigi (up by 1.0% id.). Kagoshima maintained the same level as the previous year (0.0% id.).

**Figure II-16: Year-by-Year Comparison of Number of Employees by Prefecture**  
(Establishments with 10 or more employees)



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

- (ii) The number of employees was highest (Table II-11) in Aichi (717,430 employees, composition ratio of 9.8%), followed by Osaka (453,551, 6.2% id.), Kanagawa (398,180, 5.4% id.), Shizuoka (393,185, 5.3% id.), Saitama (379,341, 5.2% id.), Tokyo (328,964, 4.5% id.), Hyogo (327,082, 4.5 % id.), and Ibaraki (244,343, 3.3% id.).

**Table II-11: Number of Employees by Prefecture  
(Establishments with 10 or more employees)**

Item	2002	2003			Item	2002	2003		
Prefecture	(persons)	(persons)	Y/Y (%)	Composition ratio (%)	Prefecture	(persons)	(persons)	Y/Y (%)	Composition ratio (%)
Total	7,463,435	7,349,539	-1.5	100.0	24 Mie	173,047	170,067	-1.7	2.3
1 Hokkaido	177,417	173,184	-2.4	2.4	25 Shiga	138,889	135,304	-2.6	1.8
2 Aomori	60,195	57,699	-4.1	0.8	26 Kyoto	139,741	137,608	-1.5	1.9
3 Iwate	91,736	92,550	0.9	1.3	27 Osaka	472,336	453,551	-4.0	6.2
4 Miyagi	121,189	119,650	-1.3	1.6	28 Hyogo	336,401	327,082	-2.8	4.5
5 Akita	70,817	70,465	-0.5	1.0	29 Nara	63,660	62,101	-2.4	0.8
6 Yamagata	103,781	103,603	-0.2	1.4	30 Wakayama	46,880	45,761	-2.4	0.6
7 Fukushima	165,781	165,343	-0.3	2.2	31 Tottori	37,010	37,032	0.1	0.5
8 Ibaraki	245,999	244,343	-0.7	3.3	32 Shimane	41,201	40,227	-2.4	0.5
9 Tochigi	185,423	187,241	1.0	2.5	33 Okayama	142,279	139,047	-2.3	1.9
10 Gunma	197,863	194,430	-1.7	2.6	34 Hiroshima	190,826	189,069	-0.9	2.6
11 Saitama	385,626	379,341	-1.6	5.2	35 Yamaguchi	93,786	90,450	-3.6	1.2
12 Chiba	208,729	203,100	-2.7	2.8	36 Tokushima	46,172	45,234	-2.0	0.6
13 Tokyo	343,514	328,964	-4.2	4.5	37 Kagawa	62,682	61,203	-2.4	0.8
14 Kanagawa	406,632	398,180	-2.1	5.4	38 Ehime	80,474	78,129	-2.9	1.1
15 Niigata	184,040	182,302	-0.9	2.5	39 Kochi	25,198	24,255	-3.7	0.3
16 Toyama	114,793	115,520	0.6	1.6	40 Fukuoka	207,347	202,404	-2.4	2.8
17 Ishikawa	83,647	83,408	-0.3	1.1	41 Saga	53,763	53,653	-0.2	0.7
18 Fukui	68,538	67,486	-1.5	0.9	42 Nagasaki	55,037	53,303	-3.2	0.7
19 Yamanashi	68,898	67,103	-2.6	0.9	43 Kumamoto	86,934	88,585	1.9	1.2
20 Nagano	192,554	192,116	-0.2	2.6	44 Oita	60,475	61,462	1.6	0.8
21 Gifu	174,478	173,493	-0.6	2.4	45 Miyazaki	55,387	54,354	-1.9	0.7
22 Shizuoka	397,634	393,185	-1.1	5.3	46 Kagoshima	69,761	69,736	0.0	0.9
23 Aichi	715,609	717,430	0.3	9.8	47 Okinawa	19,256	19,786	2.8	0.3

### (3) Shipment value

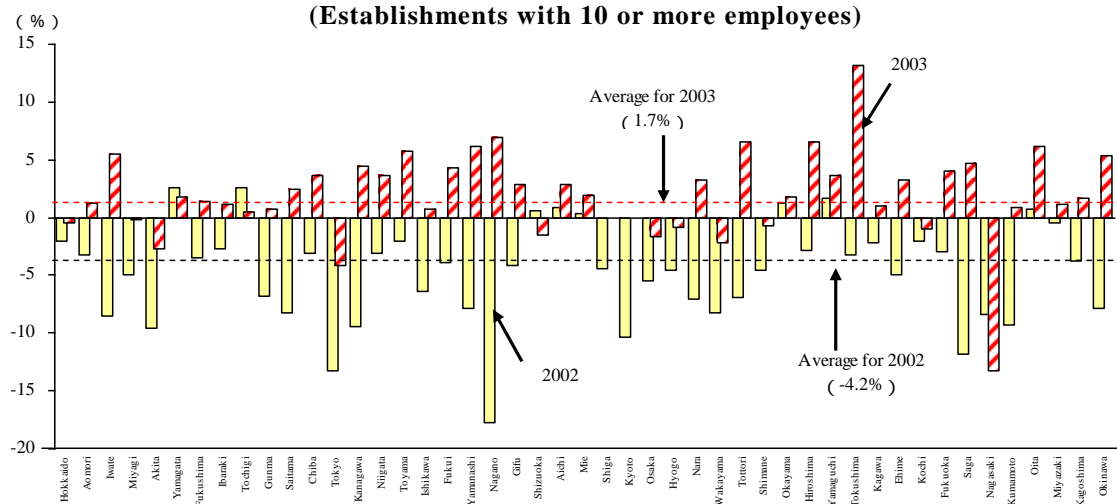
– Increase in 34 prefectures, decrease in 12 prefectures and virtually flat in one prefecture –

Shipment value was 264.6791 trillion yen, an increase of 1.7% compared to the previous year (Table II-12).

(i) By prefecture (Figure II-17), shipment value increased in 34 prefectures, including Tokushima (up by 13.1% compared to the previous year), Nagano (up by 6.9% id.), Tottori and Hiroshima (up by 6.5% id. respectively), Yamanashi and Oita (up by 6.2% id. respectively), Toyama (up by 5.7% id.) and Iwate (up by 5.5% id.), and decreased in 12 prefectures such as Nagasaki (down by 13.2% id.), Tokyo (down by 4.1% id.), Akita (down by 2.7% id.), and Wakayama (down by 2.2% id.). Kyoto maintained the same level as the previous year (0.0% id.).

Of the prefectures where shipment value increased, shipment value of storage batteries for digital appliances and light emitting diode increased in Tokushima, personal computers and printers in Nagano, numerical control equipment, injection molding equipment, and light emitting diode in Yamanashi, parts and accessories of office machines, digital cameras, and iron and steel products in Oita, and cellular telephones, oil hydraulic equipment and pneumatic equipment in Iwate. Shipment value decreased due to a decline for information and communication equipment (displays, etc.) caused by an overseas production shift for Nagasaki, declining demand for general-purpose computers and work stations and a decrease for personal computers caused by an overseas production shift for Tokyo, and a decrease in shipment value of cable broadcasting equipment for Akita.

**Figure II-17: Year-by-Year Comparison of Shipment Value by Prefecture**  
(Establishments with 10 or more employees)



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

- (ii) The value of shipment was highest (Table II-12) in Aichi (34.6428 trillion yen, composition ratio of 13.1%), followed by Kanagawa (18.3553 trillion yen, 6.9% id.), Shizuoka (15.5131 trillion yen, 5.9% id.), Osaka (14.5194 trillion yen, 5.5% id.), Saitama (12.5467 trillion yen, 4.7% id.), Hyogo (11.9758 trillion yen, 4.5% id.), Chiba (10.6720 trillion yen, 4.0% id.), Tokyo (10.3873 trillion yen, 3.9% id.), Ibaraki (9.8990 trillion yen, 3.7% id.).

**Table II-12: Shipment Value by Prefecture**  
(Establishments with 10 or more employees)

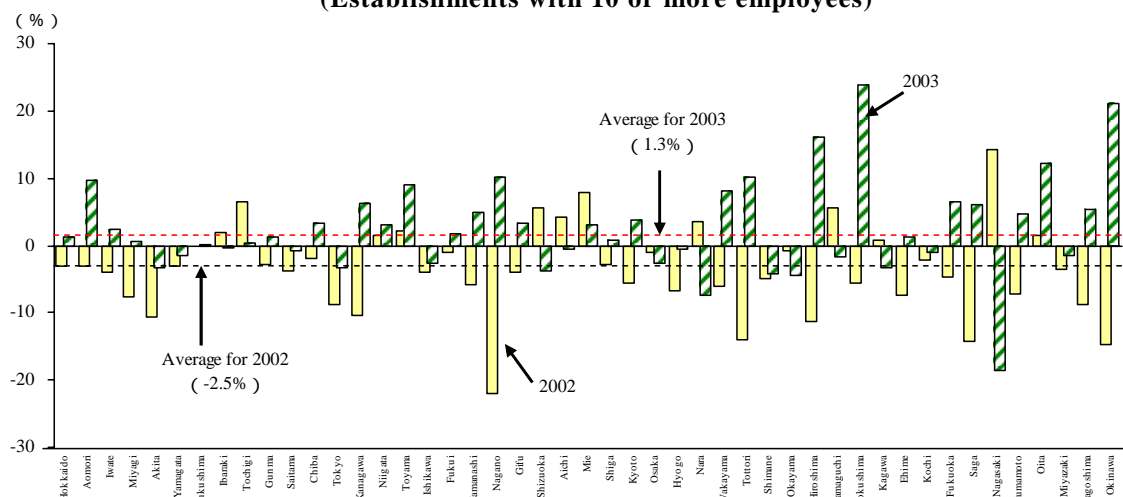
Item Prefecture	2002	2003		Composition ratio (%)	Item Prefecture	2002	2003		Composition ratio (%)
	(100 million yen)	(100 million yen)	Y/Y (%)			(100 million yen)	(100 million yen)	Y/Y (%)	
Total	2,602,587	2,646,791	1.7	100.0	24 Mie	75,112	76,513	1.9	2.9
1 Hokkaido	50,428	50,243	-0.4	1.9	25 Shiga	56,972	56,934	-0.1	2.2
2 Aomori	11,453	11,598	1.3	0.4	26 Kyoto	44,207	44,200	0.0	1.7
3 Iwate	19,911	21,012	5.5	0.8	27 Osaka	147,527	145,194	-1.6	5.5
4 Miyagi	33,323	33,268	-0.2	1.3	28 Hyogo	120,883	119,758	-0.9	4.5
5 Akita	12,807	12,466	-2.7	0.5	29 Nara	18,983	19,597	3.2	0.7
6 Yamagata	26,367	26,846	1.8	1.0	30 Wakayama	19,705	19,266	-2.2	0.7
7 Fukushima	50,311	51,015	1.4	1.9	31 Tottori	9,954	10,597	6.5	0.4
8 Ibaraki	97,909	98,990	1.1	3.7	32 Shimane	9,579	9,514	-0.7	0.4
9 Tochigi	74,970	75,376	0.5	2.8	33 Okayama	61,633	62,747	1.8	2.4
10 Gunma	70,402	70,891	0.7	2.7	34 Hiroshima	63,633	67,743	6.5	2.6
11 Saitama	122,393	125,467	2.5	4.7	35 Yamaguchi	48,844	50,594	3.6	1.9
12 Chiba	102,965	106,720	3.6	4.0	36 Tokushima	13,373	15,121	13.1	0.6
13 Tokyo	108,264	103,873	-4.1	3.9	37 Kagawa	19,797	20,003	1.0	0.8
14 Kanagawa	175,782	183,553	4.4	6.9	38 Ehime	30,175	31,157	3.3	1.2
15 Niigata	40,093	41,548	3.6	1.6	39 Kochi	5,062	5,012	-1.0	0.2
16 Toyama	31,261	33,047	5.7	1.2	40 Fukuoka	67,762	70,514	4.1	2.7
17 Ishikawa	22,052	22,236	0.8	0.8	41 Saga	13,506	14,142	4.7	0.5
18 Fukui	15,816	16,501	4.3	0.6	42 Nagasaki	14,350	12,449	-13.2	0.5
19 Yamanashi	20,292	21,557	6.2	0.8	43 Kumamoto	23,043	23,252	0.9	0.9
20 Nagano	51,268	54,798	6.9	2.1	44 Oita	27,909	29,629	6.2	1.1
21 Gifu	44,558	45,850	2.9	1.7	45 Miyazaki	11,698	11,826	1.1	0.4
22 Shizuoka	157,431	155,131	-1.5	5.9	46 Kagoshima	16,737	16,996	1.6	0.6
23 Aichi	336,751	346,428	2.9	13.1	47 Okinawa	5,336	5,618	5.3	0.2

#### (4) Value added – Increased in 29 prefectures and decreased in 18 prefectures –

Value added was 93.8800 trillion yen, an increase of 1.3% compared to the previous year (Table II-13).

(i) By prefecture (Figure II-18), value added increased in 29 prefectures such as Tokushima (up by 23.9% compared to the previous year), Okinawa (up by 21.1% id.), Hiroshima (up by 16.1% id.), Oita (up by 12.2% id.), Tottori (up by 10.2% id.), and Nagano (up by 10.1% id.), and decreased in 18 prefectures including Nagasaki (down by 18.6% id.), Nara (down by 7.5% id.), Okayama (down by 4.5% id.), Shimane (down by 4.3% id.), Shizuoka (down by 3.7% id.), and Akita and Kagawa (down by 3.3% id. respectively)

**Figure II-18: Year-by-Year Comparison of Value Added by Prefecture**  
(Establishments with 10 or more employees)



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the year-on-year comparisons for 2002 are calculated by incorporating the classification for 2001.

(ii) Value added was highest (Table II-13) in Aichi (10.6492 trillion yen, composition ratio of 11.3%), followed by Kanagawa (6.1998 trillion yen, 6.6% id.), Osaka (5.8686 trillion yen, 6.3% id.), Shizuoka (5.7089 trillion yen, 6.1% id.), Saitama (4.5219 trillion yen, 4.8% id.), Hyogo (4.3928 trillion yen, 4.7% id.), Tokyo (4.0956 trillion yen, 4.4% id.), Ibaraki (3.5124 trillion yen, 3.7% id.), Chiba (3.3292 trillion yen, 3.5% id.), and Tochigi (2.6922 trillion yen, 2.9% id.).

**Table II-13: Value Added by Prefecture  
(Establishments with 10 or more employees)**

Item Prefecture	2002	2003		Composition ratio (%)	Item Prefecture	2002	2003		Composition ratio (%)
	(100 million yen)	(100 million yen)	Y/Y (%)			(100 million yen)	(100 million yen)	Y/Y (%)	
Total	926,879	938,800	1.3	100.0	24 Mie	25,263	26,035	3.1	2.8
1 Hokkaido	16,613	16,818	1.2	1.8	25 Shiga	23,297	23,491	0.8	2.5
2 Aomori	3,410	3,741	9.7	0.4	26 Kyoto	17,992	18,660	3.7	2.0
3 Iwate	6,385	6,540	2.4	0.7	27 Osaka	60,332	58,686	-2.7	6.3
4 Miyagi	10,648	10,698	0.5	1.1	28 Hyogo	44,146	43,928	-0.5	4.7
5 Akita	4,885	4,722	-3.3	0.5	29 Nara	8,067	7,459	-7.5	0.8
6 Yamagata	8,416	8,290	-1.5	0.9	30 Wakayama	7,612	8,235	8.2	0.9
7 Fukushima	19,144	19,163	0.1	2.0	31 Tottori	2,785	3,069	10.2	0.3
8 Ibaraki	35,267	35,124	-0.4	3.7	32 Shimane	3,238	3,100	-4.3	0.3
9 Tochigi	26,815	26,922	0.4	2.9	33 Okayama	19,984	19,091	-4.5	2.0
10 Gunma	24,639	24,960	1.3	2.7	34 Hiroshima	22,360	25,955	16.1	2.8
11 Saitama	45,530	45,219	-0.7	4.8	35 Yamaguchi	16,922	16,650	-1.6	1.8
12 Chiba	32,216	33,292	3.3	3.5	36 Tokushima	5,760	7,139	23.9	0.8
13 Tokyo	42,314	40,956	-3.2	4.4	37 Kagawa	6,430	6,215	-3.3	0.7
14 Kanagawa	58,323	61,998	6.3	6.6	38 Ehime	9,470	9,580	1.2	1.0
15 Niigata	16,905	17,409	3.0	1.9	39 Kochi	2,356	2,330	-1.1	0.2
16 Toyama	13,690	14,925	9.0	1.6	40 Fukuoka	23,511	25,074	6.6	2.7
17 Ishikawa	8,404	8,187	-2.6	0.9	41 Saga	5,090	5,399	6.1	0.6
18 Fukui	6,465	6,577	1.7	0.7	42 Nagasaki	4,891	3,983	-18.6	0.4
19 Yamanashi	7,151	7,496	4.8	0.8	43 Kumamoto	8,224	8,604	4.6	0.9
20 Nagano	17,864	19,672	10.1	2.1	44 Oita	8,959	10,052	12.2	1.1
21 Gifu	17,326	17,903	3.3	1.9	45 Miyazaki	4,245	4,182	-1.5	0.4
22 Shizuoka	59,256	57,089	-3.7	6.1	46 Kagoshima	5,800	6,107	5.3	0.7
23 Aichi	107,175	106,492	-0.6	11.3	47 Okinawa	1,307	1,582	21.1	0.2

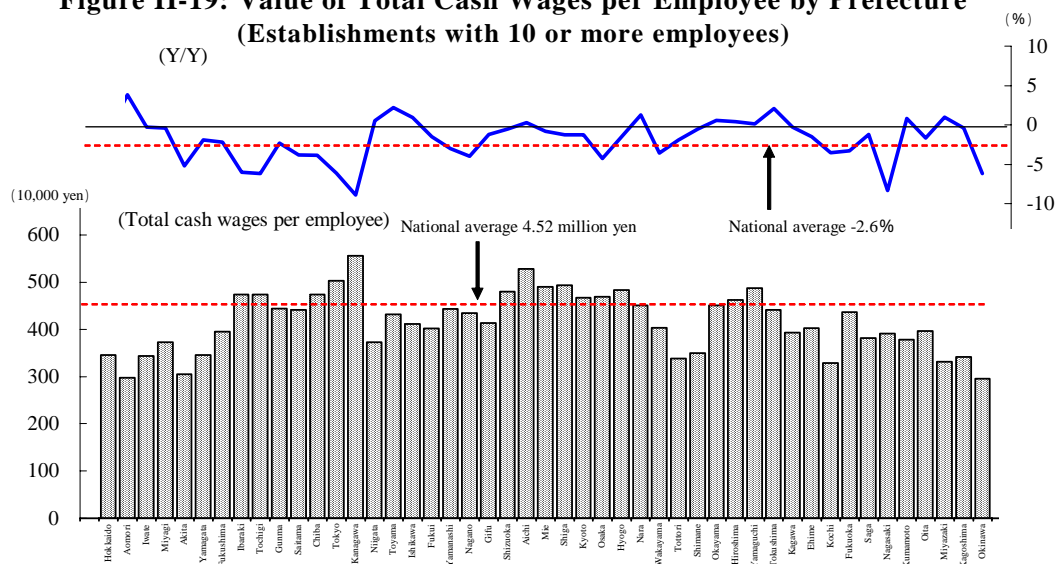
## (5) Value of total cash wages and salaries

The value of total cash wages and salaries per employee was 4.52 million yen, a decrease of 2.6% compared to the previous year (Table II-19).

(i) By prefecture, the value decreased in 35 prefectures including Kanagawa (down by 8.9% compared to the previous year), Nagasaki (down by 8.3% id.), Tochigi and Okinawa (down by 6.2% id. respectively), Tokyo (down by 6.1% id.), and Ibaraki (down by 6.0% id.), and increased in 12 prefectures such as Aomori (up by 3.8% id.), Toyama (up by 2.2% id.), Tokushima (up by 2.1% id.), Nara (up by 1.3% id.), and Miyazaki (up by 1.0% id.).

(ii) The value of total cash wages and salaries per employee was highest in Kanagawa (5.56 million yen), followed by Aichi (5.28 million yen), Tokyo (5.03 million yen), Shiga (4.93 million yen), Mie (4.90 million yen), Yamaguchi (4.87 million yen), Hyogo (4.83 million yen), and Shizuoka (4.79 million yen).

**Figure II-19: Value of Total Cash Wages per Employee by Prefecture  
(Establishments with 10 or more employees)**



## < TOPICS >

### I. Business starts, discontinuance and continuance of establishments (Establishments with 10 or more employees)

#### 1. Business start ratio, discontinuance ratio, and continuance of establishments

When viewing the survey results by establishment that started, discontinued, or continued operations, the number of establishments that have continued operations from 2002 to 2003 was 132,083. 92.1% of establishments with over 10 or more employees in 2003 continued operations. The number of establishments that started operations was 1,563 (business start ratio of 1.1%), and the number of establishments that discontinued business was 4,518 (discontinuance ratio of 3.1%).

On a shipment value basis, the ratio of continuance of establishments was 96.2% in 2003, which was larger than the ratio for the number of establishments. The business start ratio was 2.7%, and the discontinuance ratio was 3.5%.

#### Establishments with 10 or more employees

	1999		2000		2001		2002		2003	
	Number of establishments	Composition ratio (%)	Number of establishments	Composition ratio (%)	Number of establishments	Composition ratio (%)	Number of establishments	Composition ratio (%)	Number of establishments	Composition ratio (%)
Total	159,346	100.0	154,723	100.0	155,182	100.0	146,632	100.0	143,360	100.0
Business start (including transference in & business conversion)	1,506	0.9	1,712	1.1	1,961	1.3	1,604	1.1	1,563	1.1
Scale-up	8,999	5.6	9,315	6.0	15,546	10.0	9,434	6.4	9,714	6.8
Continuance	148,841	93.4	143,696	92.9	137,675	88.7	135,594	92.5	132,083	92.1
Scale-down	12,642	-	10,582	-	11,105	-	13,479	-	18,581	-
Discontinuance (including transference out & business conversion)	5,422	3.2	5,068	3.2	5,943	3.8	6,109	4.0	4,518	3.1

	1999		2000		2001		2002		2003	
	(100 million yen)	Composition ratio (%)	(100 million yen)	Composition ratio (%)	(100 million yen)	Composition ratio (%)	(100 million yen)	Composition ratio (%)	(100 million yen)	Composition ratio (%)
Total	2,792,555	100.0	2,882,798	100.0	2,764,170	100.0	2,602,587	100.0	2,646,791	100.0
Business start (including transference in & business conversion)	20,978	0.8	16,037	0.6	27,189	1.0	37,940	1.5	72,639	2.7
Scale-up	30,458	1.1	33,561	1.2	41,790	1.5	37,596	1.4	27,429	1.0
Continuance	2,741,120	98.2	2,833,199	98.3	2,695,191	97.5	2,527,052	97.1	2,546,722	96.2
Scale-down	38,903	-	32,413	-	39,812	-	32,001	-	23,120	-
Discontinuance (including transference out & business conversion)	50,510	1.7	43,324	1.6	58,510	2.0	87,181	3.2	90,242	3.5

Note: Business start ratio = the number of establishments of “business start, transference in & business conversion”/the total number of establishments x 100

Discontinuance ratio = the number of establishments of “business stop, transference out & business conversion”/the total number of establishments x 100

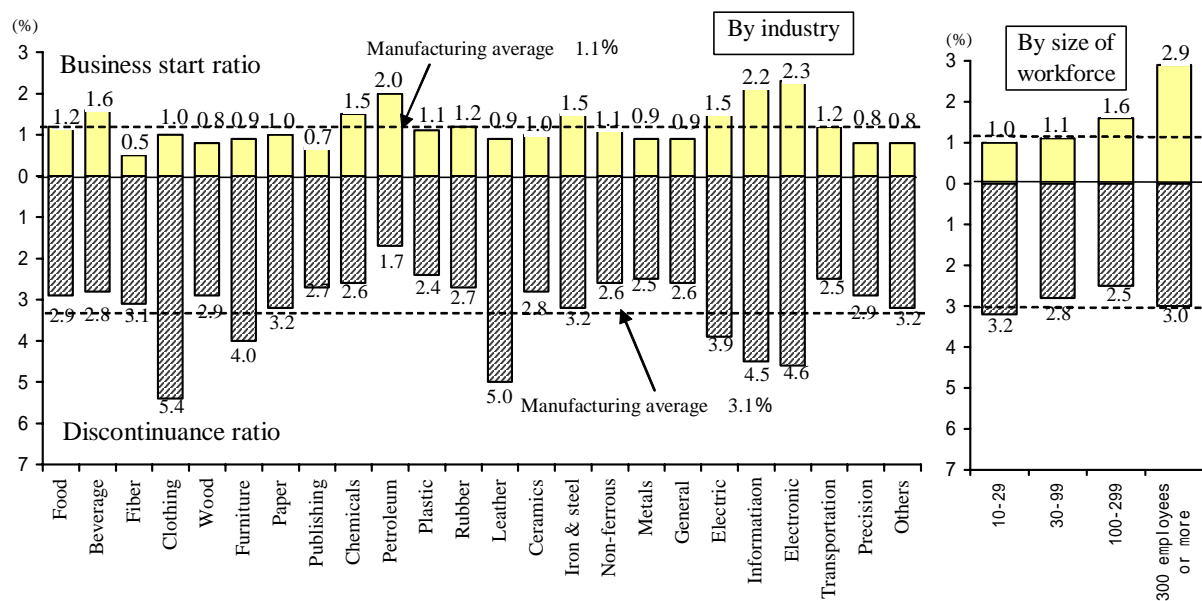
(Because of the revision of the Japan Standard Industrial Classification, the total number of establishments in the previous year for the 2002 discontinuance ratio is calculated by incorporating the classification of 2002.)



The business start ratio in the overall manufacturing area was 1.1%, maintaining the same level as the previous year.

When observing business start ratio by industry, the ratio was highest in the electronic parts and devices industry (2.3%), followed by the information and communication electronics equipment industry (2.2%), the petroleum and coal products industry (2.0%). By size of workforce, the ratio was highest in establishments with more than 300 employees (2.9%), followed by those with 100 to 299 employees (1.6%), those with 30 to 99 employees (1.1%), and those with 10 to 29 employees (1.0%)

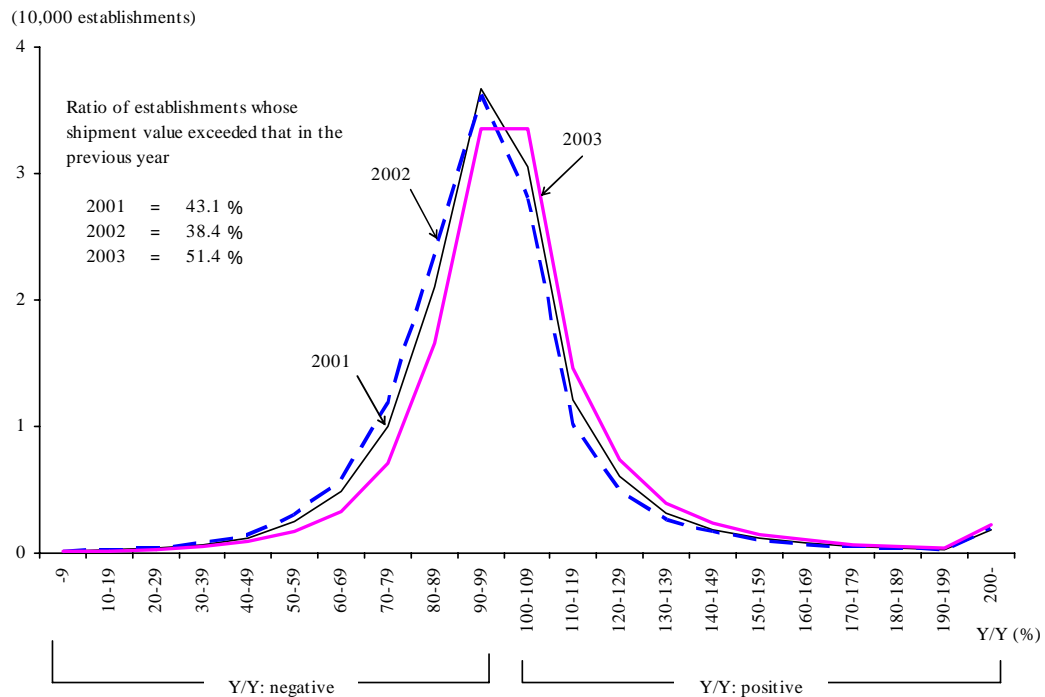
**Business Start Ratio and Discontinuance Ratio by Industry and Size of Workforce**  
(Establishments with 10 or more employees)



## 2. Distribution of year-by-year comparison of shipment value of continuing establishments

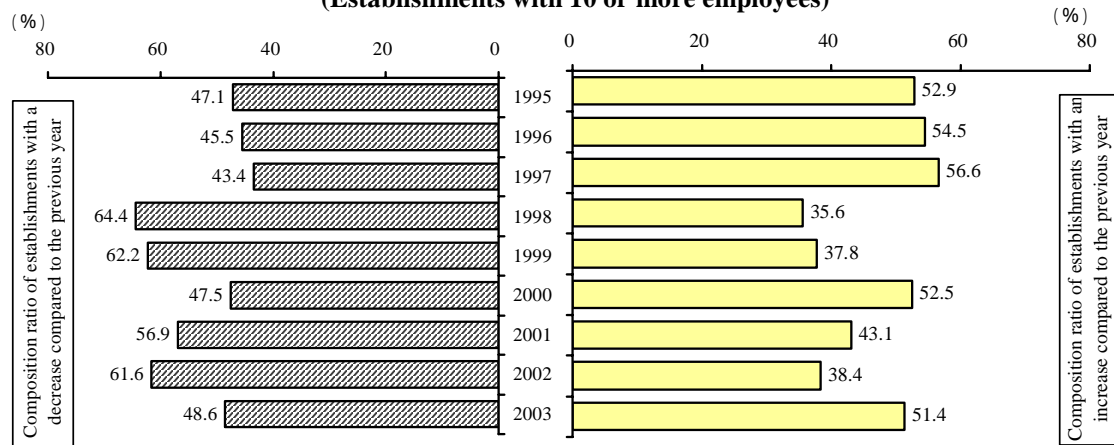
When viewing the distribution of the year-by-year comparison of shipment value of continuing establishments from 2002 to 2003, distribution shifted right when compared to 2002.

**Distribution of Year-by-Year Comparison of Shipment Value of Continuing Establishments**  
(Establishments with 10 or more employees)



The ratio of establishments whose shipment value rose compared to the previous year increased from 38.4% in 2002 to 51.4% in 2003, an increase of 13.0 points. The ratio exceeded 50% for the first time since 2000.

**Year-by-Year Comparison of Shipment Value**  
(Establishments with 10 or more employees)



Note: Because of the revision of the Japanese Standard Industrial Classification in the 2002 survey, the figures for before 2001 are calculated by incorporating the classification for 2002. Hereinafter the same.

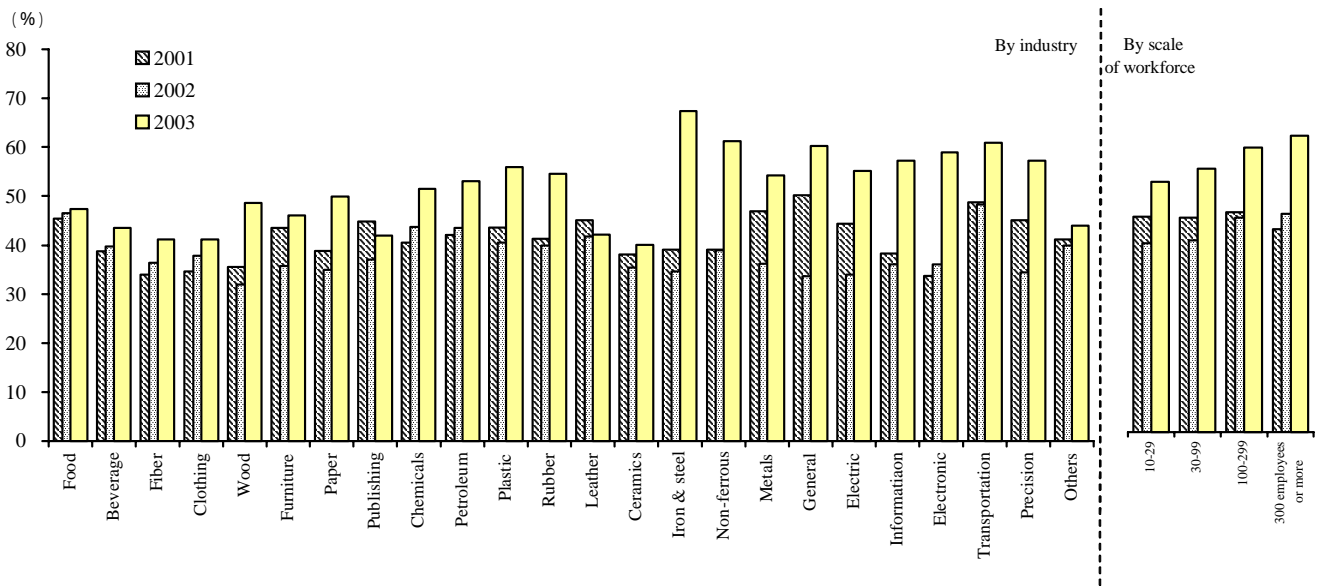
By industry, the value of shipment of continuing establishments increased from the previous year in all industries.

The increase rate was highest in iron and steel (up by 32.8 point compared to the previous year), general machinery (up by 26.7 point id.), precision instruments (up by 22.9 point id.), electronic parts and devices (up by 22.8 point id.), non-ferrous metals and products (up by 22.4 point id.), electrical machinery, equipment and supplies (up by 21.2 point id.), and information and communication electronics equipment (up by 21.1 point id.).

In addition, the ratio of establishments positive in a year-by-year comparison of shipment value was highest in iron and steel (composition ratio of 67.4%), non-ferrous metals and products (61.3% id.), transportation equipment (60.9% id.), general machinery (60.3% id.), electronic parts and devices (58.9% id.), precision instruments and machinery (57.3% id.), and information and communication electronics equipment (57.2% id.).

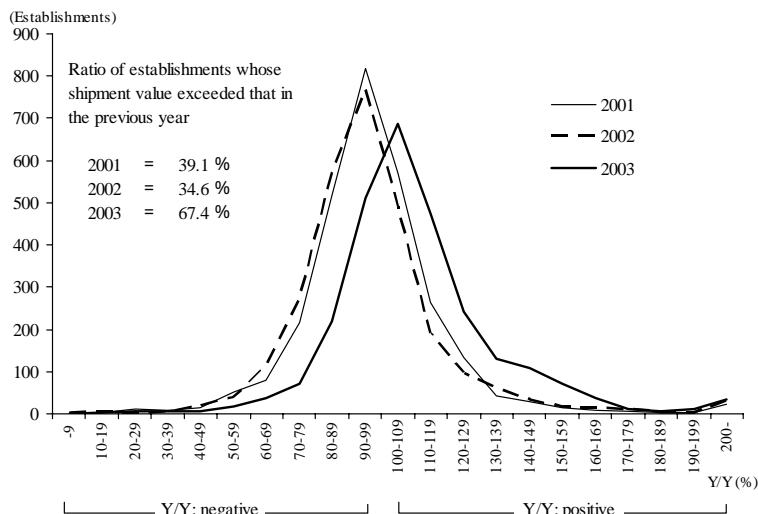
By size of workforce, the ratio of establishments positive in a year-by-year comparison of shipment value increased in all scales.

### Establishments with a Year-by-Year Shipment Value Increase by Industry and Size of Workforce (Establishments with 10 or more employees)

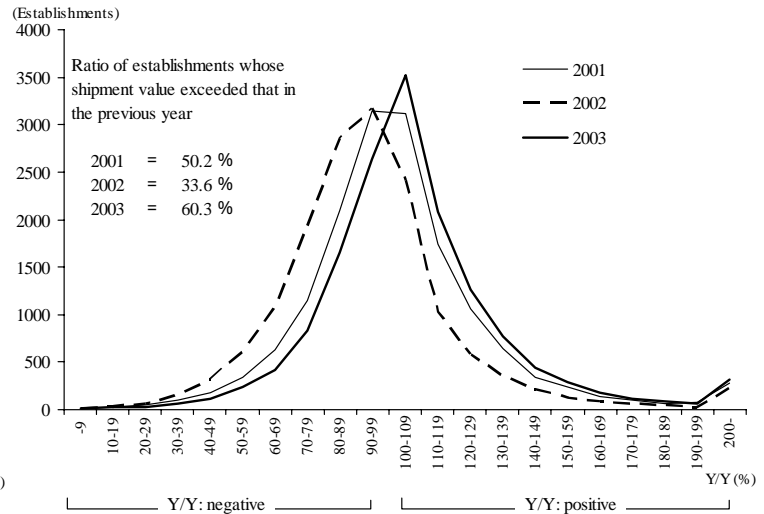


= Distribution of Year-by-Year Comparison of Shipment Value of Industries with Positive Ratio (Excerpt) =

#### Iron and steel

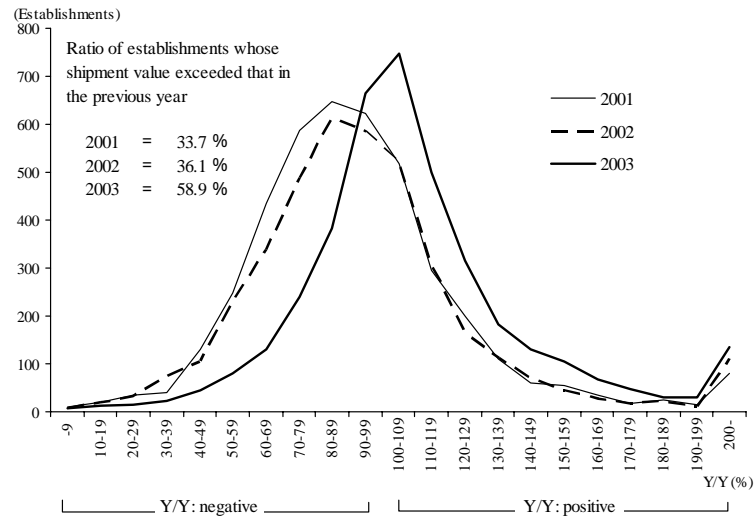
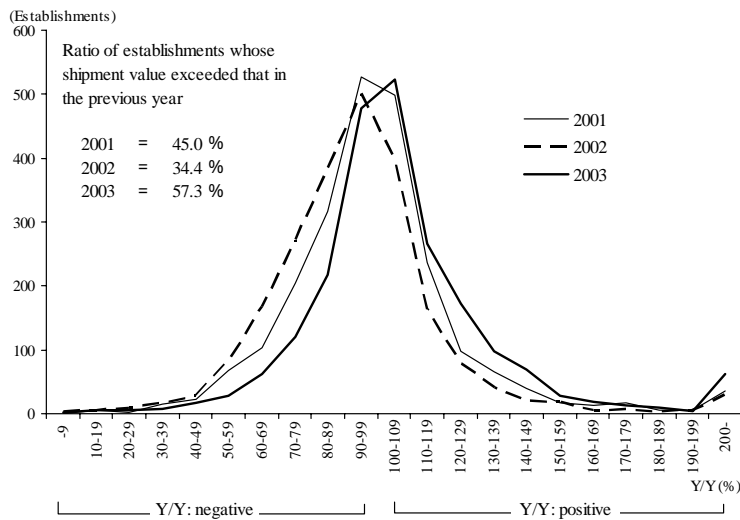


#### General machinery



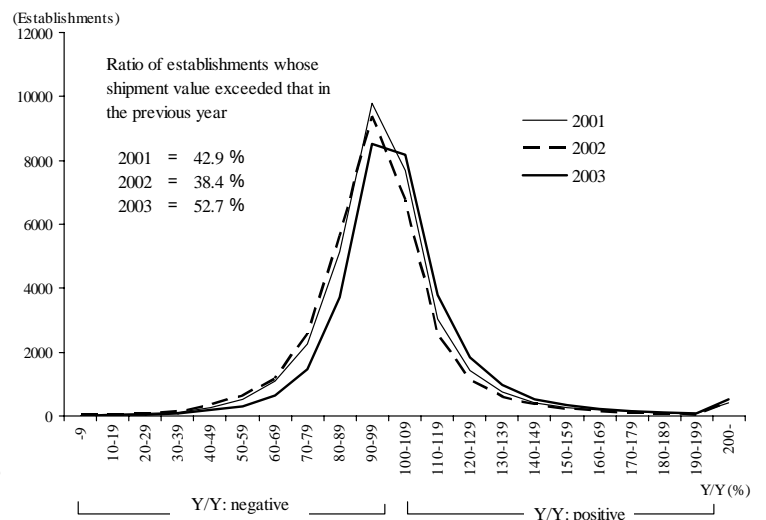
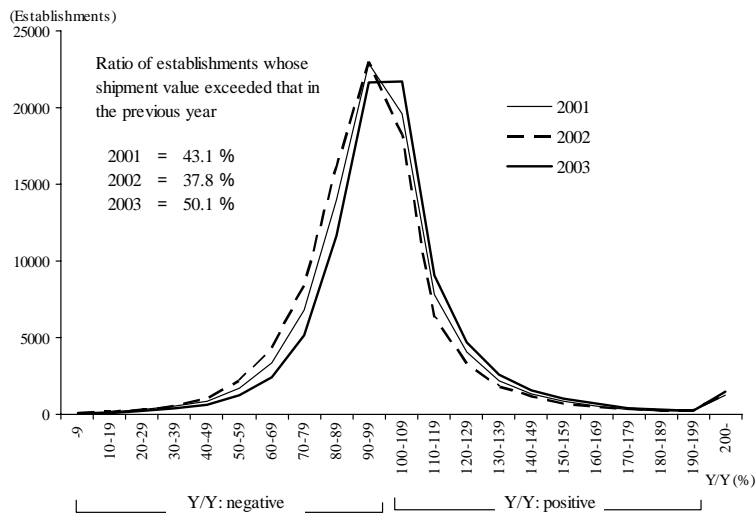
## = Distribution of Year-by-Year Comparison of Shipment Value of Industries with Positive Ratio (Excerpt) =

### Precision instruments and machinery      Electronic parts and devices

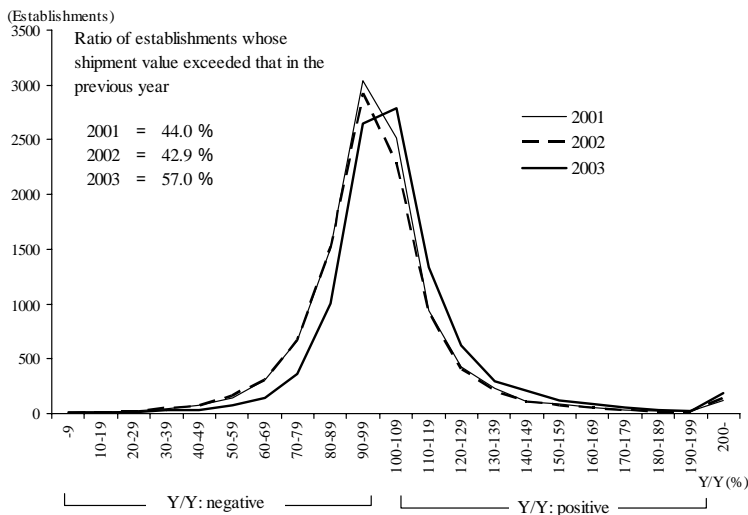


## = Distribution of Year-by-Year Comparison of Shipment Value of Industries by Size of Workforce =

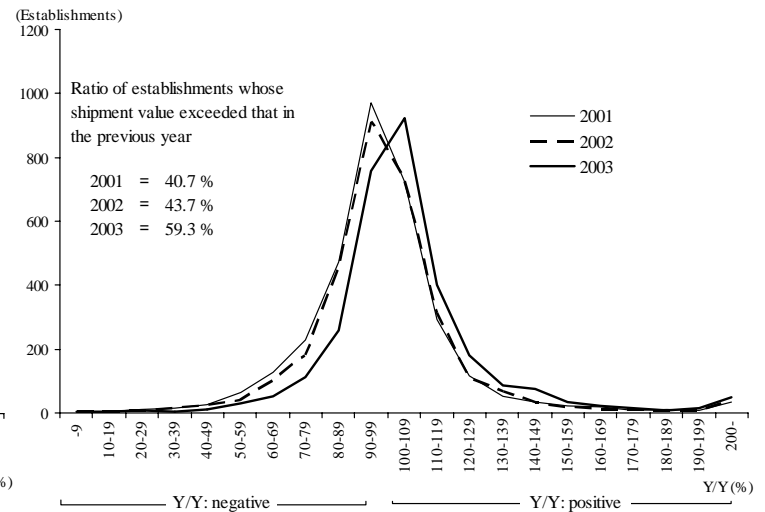
### Establishments with 10 to 29 employees      Establishments with 30 to 99 employees



### Establishments with 100 to 299 employees



### Establishments with 300 or more employees



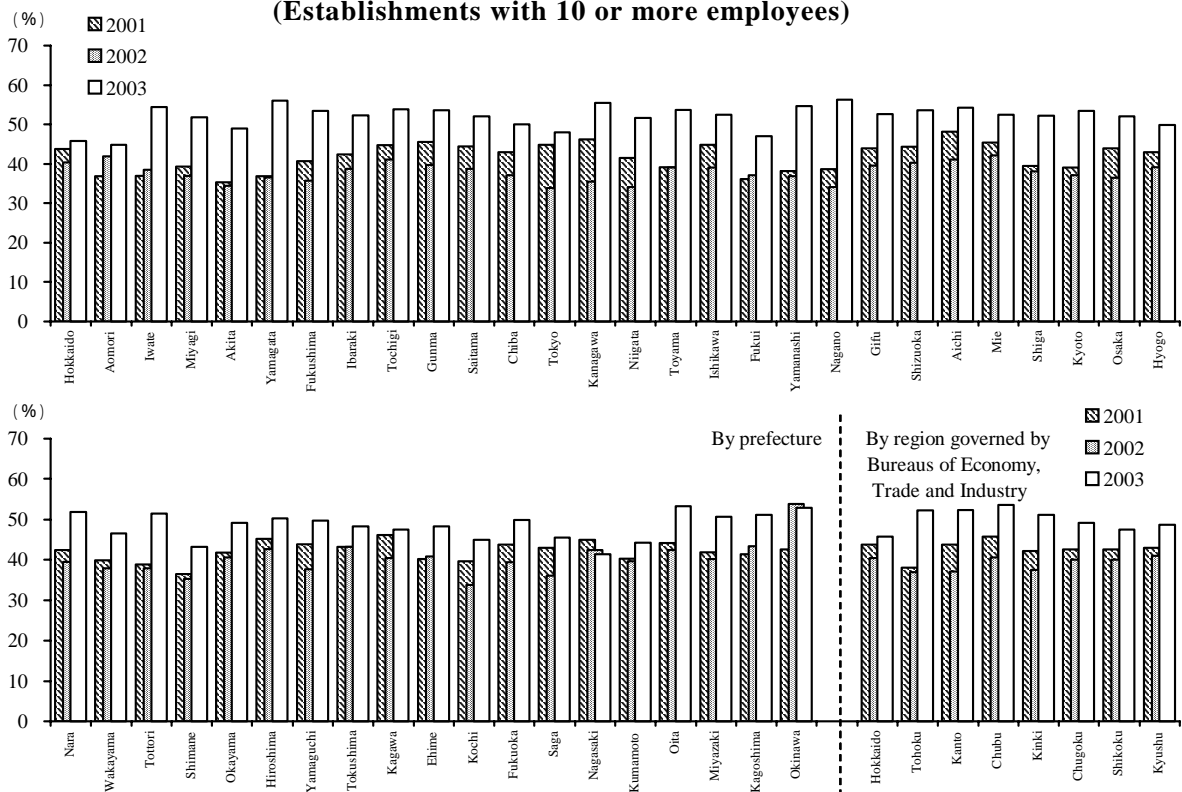
By prefecture, shipment value of continuing establishments increased from the previous year in all prefectures except for Nagasaki and Okinawa. The ratio increase was highest in Nagano, followed by Kanagawa, Yamagata, Yamanashi, Fukushima, and Niigata.

In addition, the ratio of establishments positive in a year-by-year comparison was highest in Nagano, followed by Yamagata, Kanagawa, Yamanashi, Iwate, Aichi, and Tochigi.

By region (districts governed by Bureaus of Economy, Trade and Industry), the ratio of establishments that was positive by year-by-year comparison increased. The range of the increase was largest in Kanto (up by 15.3 points compared to the previous year), followed by Tohoku (up by 15.2 points id.), Kinki (up by 13.7 points id.), and Chubu (up by 12.9 points id.).

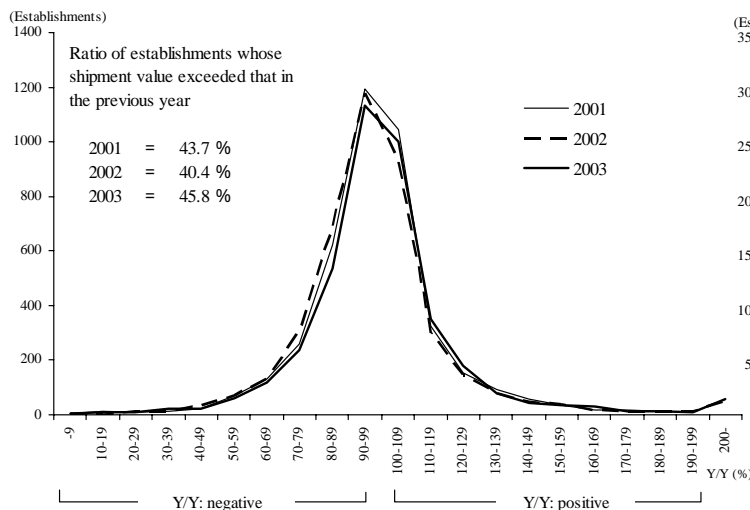
The ratio of establishments that was positive by year-by-year comparison was highest in Chubu, followed by Kanto and Tohoku.

**Establishments with a Year-by-Year Shipment Value Increase by Prefecture and Region**  
(Establishments with 10 or more employees)

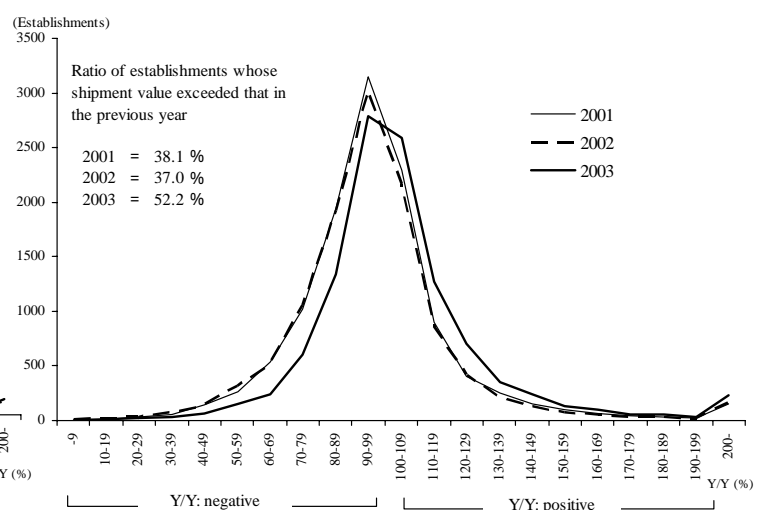


= Distribution of Year-by-Year Comparison of Shipment Value of Industries by Region =

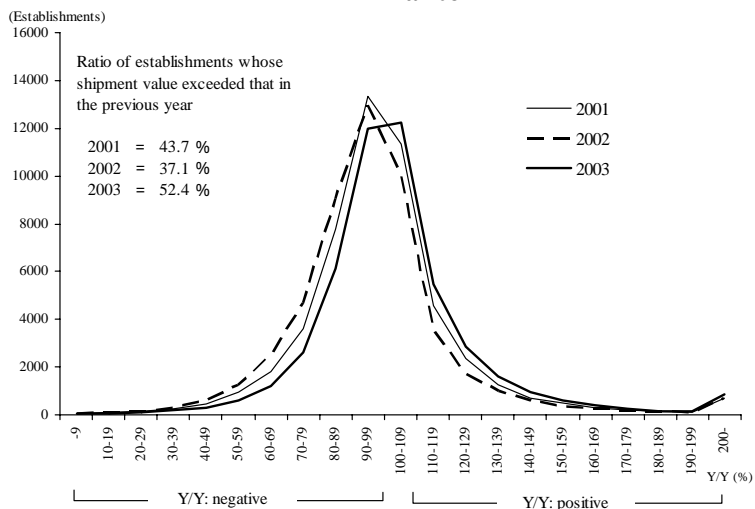
### Hokkaido



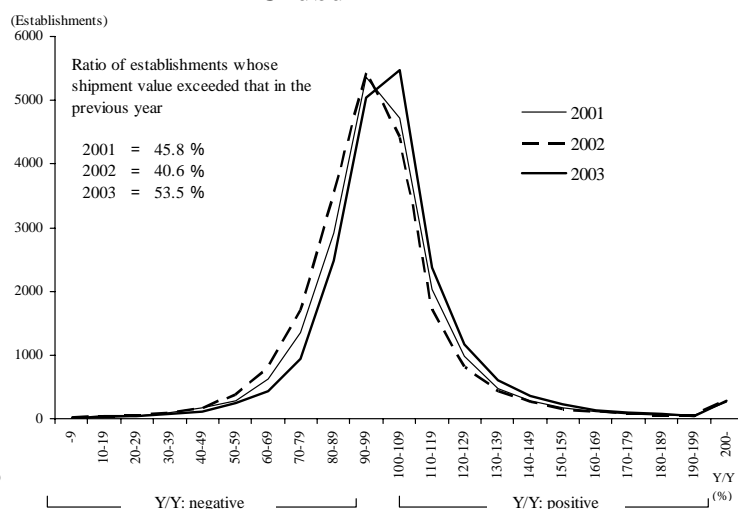
### Tohoku



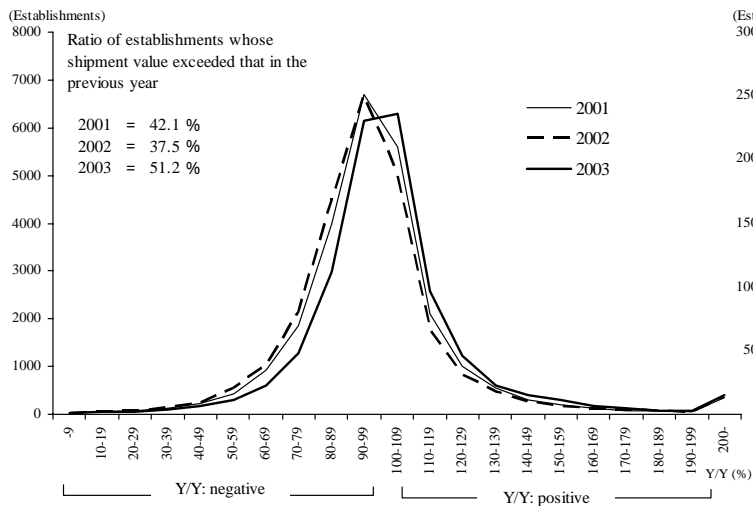
## Kanto



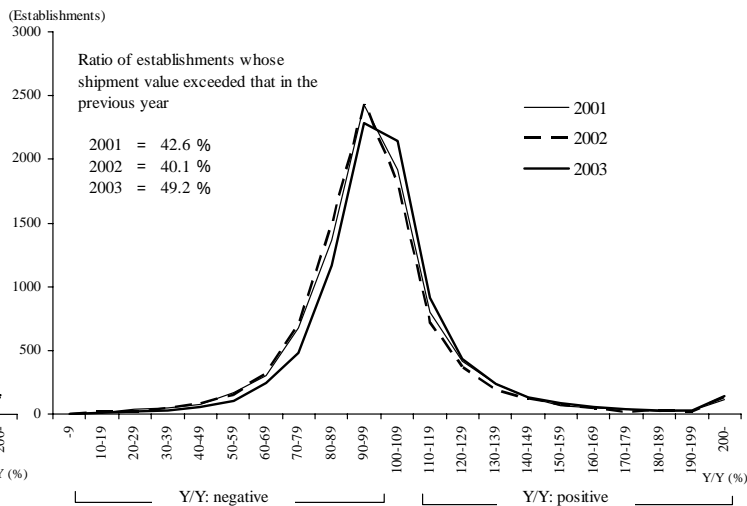
## Chubu



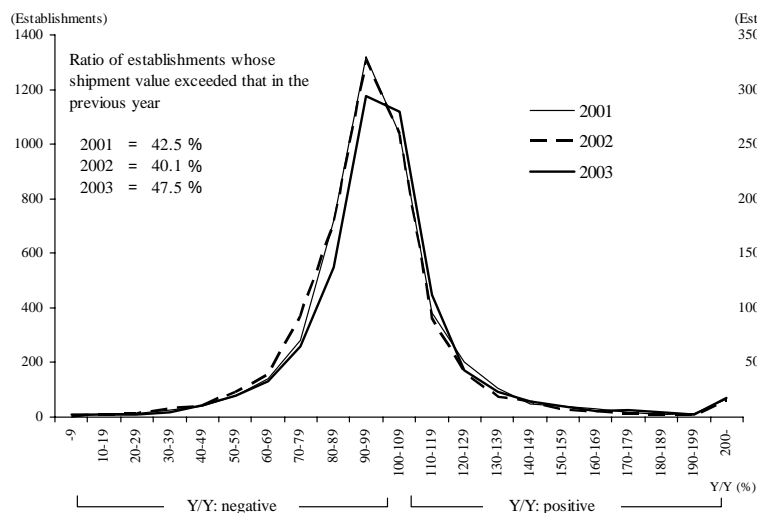
## Kinki



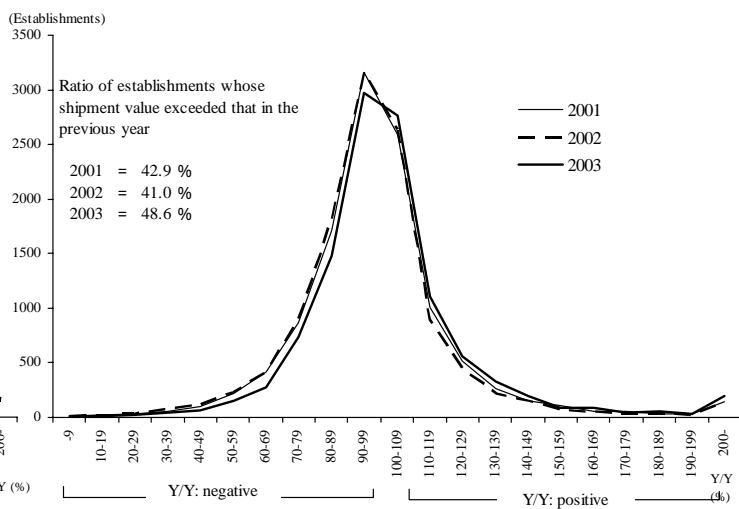
## Chugoku



## Shikoku



## Kyushu



Prefectures governed by each Bureau of Economy, Trade and Industry are as follows.

Regions governed by Bureaus of Economy, Trade and Industry	Prefectures
Hokkaido	Hokkaido
Tohoku	Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima
Kanto	Ibaraki, Tochigi, Gunma, Saitama, Chiba, Tokyo, Kanagawa, Niigata, Yamanashi, Nagano, Shizuoka
Chubu	Toyama, Ishikawa, Gifu, Aichi, Mie
Kinki	Fukui, Shiga, Kyoto, Osaka, Hyogo, Nara, Wakayama
Chugoku	Tottori, Shimane, Okayama, Hiroshima, Yamaguchi
Shikoku	Tokushima, Kagawa, Ehime, Kochi
Kyushu	Fukuoka, Saga, Nagasaki, Kumamoto, Oita, Miyazaki, Kagoshima, Okinawa

## II. Labor Productivity of the Japanese Manufacturing Industry (Establishments with 10 or more employees)

The Japanese manufacturing industry has seen a decrease both in the number of employees and value added, due to labor adjustments, an overseas production shift, and an increase in imported goods. However, value added per employee (establishments with 10 or more employees) has maintained a high level, marking a record high in 2003.

Therefore, we will look at labor productivity (hereinafter referred to as “productivity”) based on indices by industry, based on value added per employee at establishments with 10 or more employees since 1995.

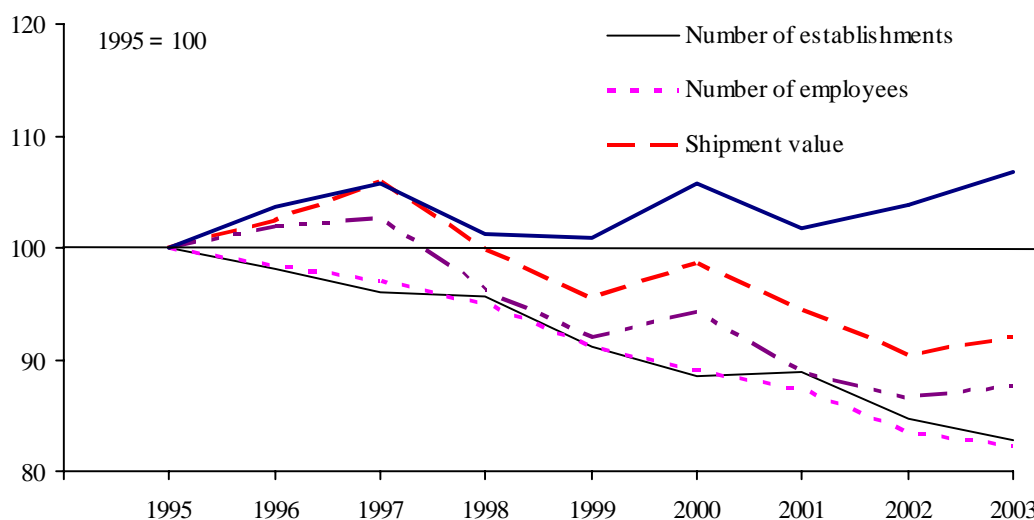
### 1. Change in major items

The Japanese economy in 1995 showed a recovery trend after hitting bottom in October 1993, but tread water until the middle of the year, affected by the Great Hanshin Awaji Earthquake, the sharp appreciation of the yen, and the slowdown of the US economy. However, responding to unprecedented economic policies and the reduction of the central bank rate, the economy picked up from the end of the year. The overall economy was generally weak throughout 1995.

Looking at major trends within the manufacturing industry, and given a base value of 100 for 1995, both the number of establishments and employees have been constantly decreasing, and were at just over 80% of the level of 1995 in 2003. Shipment value and value added declined after hitting a peak in 1997. Even with increases stemming from the IT bubble in 2000 and with digital appliances as the driving force in 2003, shipment value and value added remained below the 1995 level, and were at around 90% of that level in 2003.

In contrast, productivity fluctuated in line with value added, but its level has constantly exceeded the level of 1995, due to a decrease in the number of employees. Productivity rose irrespective of decreasing value added in 2002, and hit a record high in 2003, showing an upward trend.

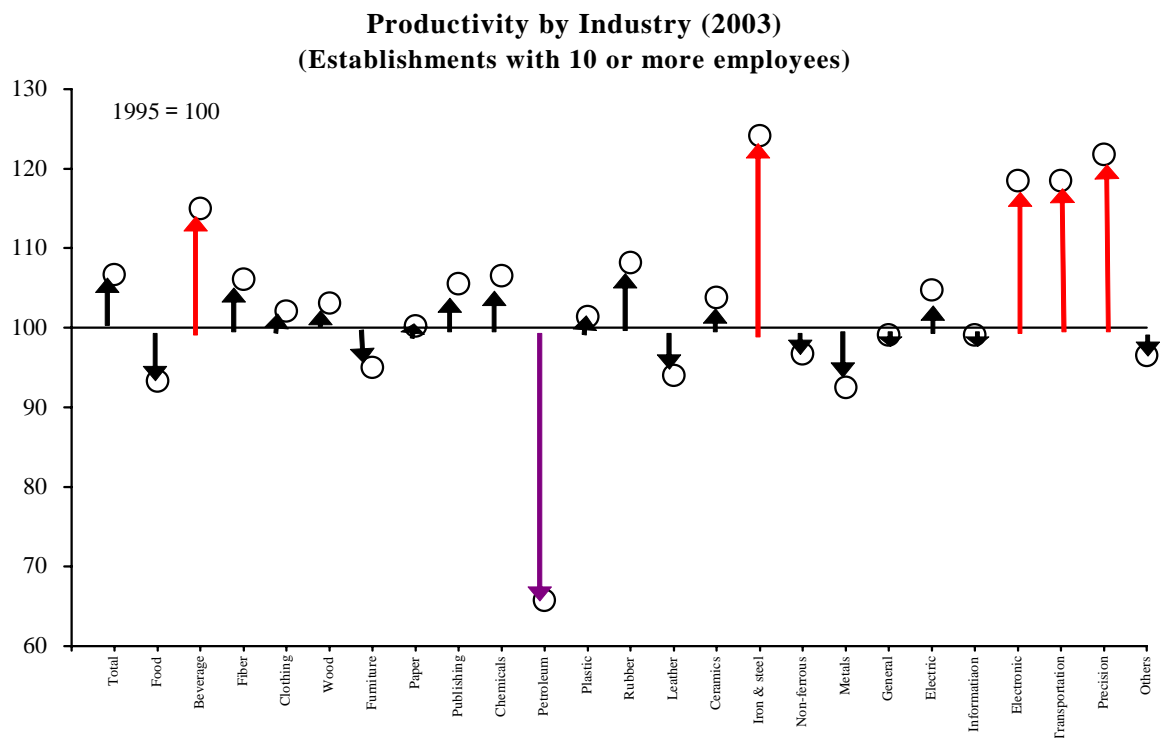
**Change in Major Items**  
(Establishments with 10 or more employees)





## 2. Labor productivity by industry

Productivity by industry exceeded the level of 1995 in the overall manufacturing industry, showing increases in 15 industries and decreases in 9 industries. The level was highest in the iron and steel industry and the precision instruments and machinery industry, rising to 1.2 times of the level of 1995. The level was lowest in the petroleum and coal products industry, staying at around 60% (id.) of the 1995 level due to the high price of crude oil. The fabricated metal products industry, the food industry, and the leather tanning, leather products and fur skins industry also saw a decline of nearly 10% compared to the level of 1995.



Secondly, we will look at changes in the number of employees and value added, classifying productivity characteristics into the following four groups.

- (i) Industries where productivity always exceeds 100 (1995 level)
- (ii) Industries where productivity is always below the average of the overall manufacturing industry
- (iii) Industries where productivity level changes significantly
- (iv) Industries where productivity remains almost the same

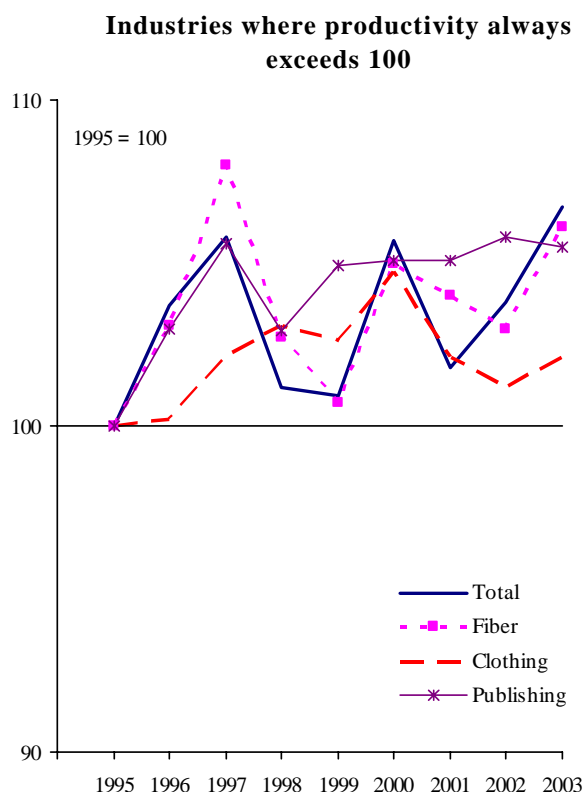
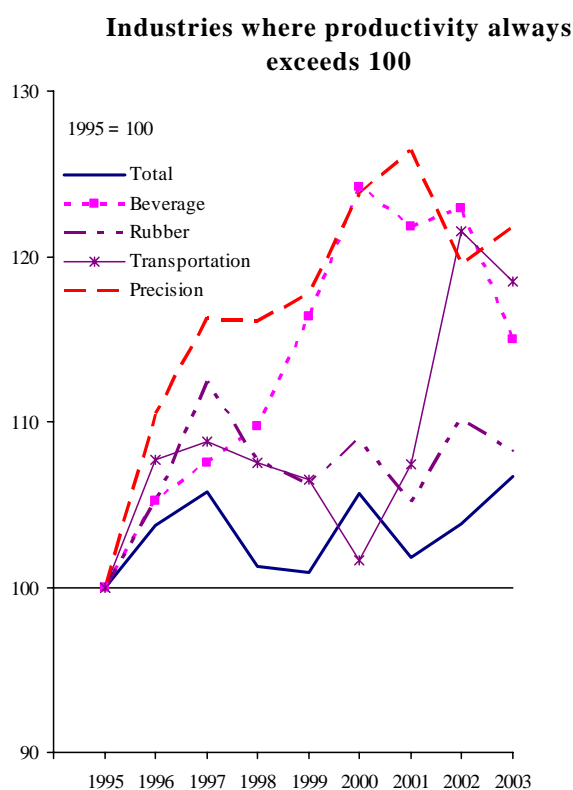
### (i) Industries where productivity always exceeds 100 (1995 level)

The beverages, tobacco, and feed industry and the transportation equipment industry saw shifts mainly in the second quadrant. The number of employees decreased only by 10% or so, and productivity improved significantly due to an increase in value added.

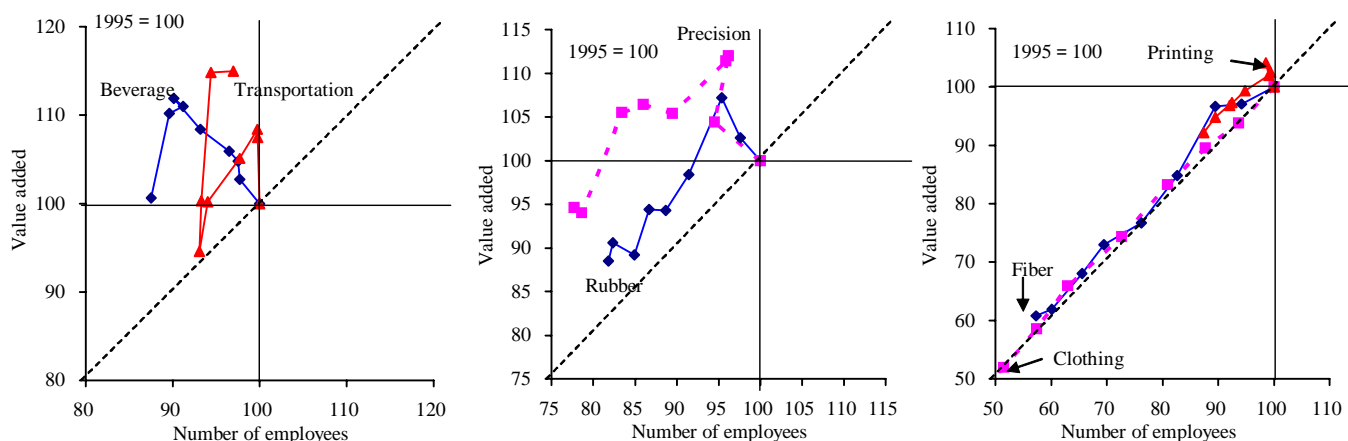
The rubber products industry and the precision instruments and machinery industry saw a sharp decline of around 20% in the number of employees, and productivity improved significantly.

In the textile mill products industry, the apparel and other finished products industry, and the printing and allied industries, both the number of employees and value added decreased but shifted slightly upper left of the 45 degree line. The level of productivity increased slightly. In particular, in the textile mill products industry, and the apparel and other finished products industry, the number of employees decreased significantly by 40% to 50%, which raised the level of productivity.

**Change in Productivity by Industry**  
(Establishments with 10 or more employees)



### Change in Number of Employees and Value Added by Industry (Establishments with 10 or more employees)

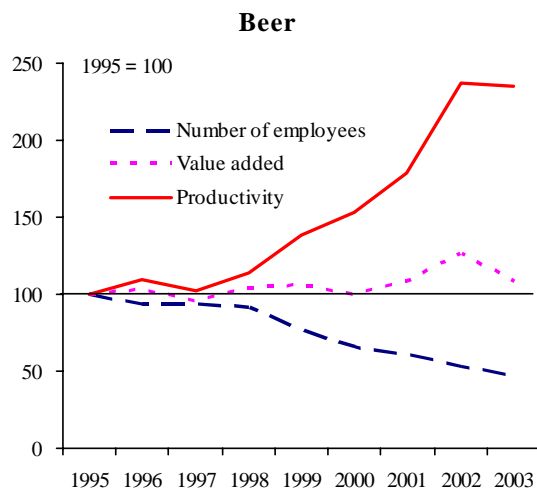


Looking at the breakdown of the beverages, tobacco, and feed industry<sup>(Note1)</sup>, “Beers” led productivity. For “Beers”, the number of employees decreased by nearly 60% compared to 1995, which raised the level of productivity significantly<sup>(Note2)</sup>.

(Note 1) Excluding the tobacco industry.

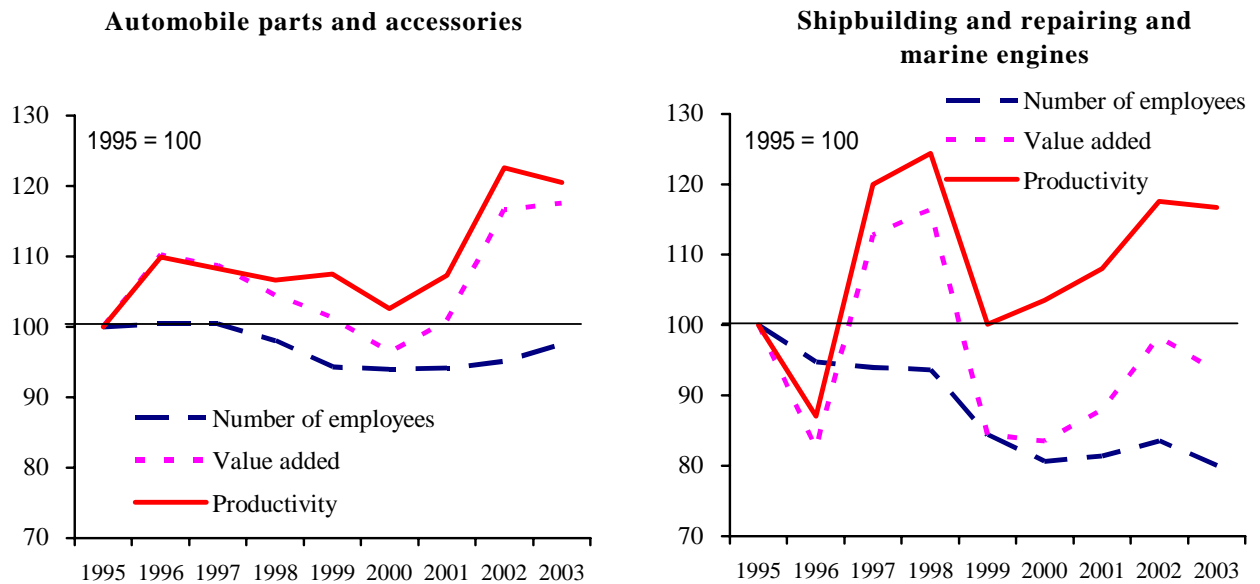
(Note 2) Although “Happoshu” is classified as “Distilled, rectified and blended liquors” in the Japan Standard Industrial Classification, establishments that produce both beer and “Happoshu” are classified into industries of higher shipment value.

### Change in Productivity of Beer Industry (Establishments with 10 or more employees)



Looking at the breakdown of the transportation equipment industry, “Automobile parts and accessories” and “Shipbuilding and repairing, and marine engines” led productivity trends. In “Shipbuilding and repairing, and marine engines”, the number of employees decreased by nearly 20% and productivity improved. In “Automobile parts and accessories”, productivity improved due to a rise in value added mainly for finished goods.

**Productivity Trend in Automobile Parts and Accessories Industry  
and Shipbuilding and Repairing and Marine Engines Industry  
(Establishments with 10 or more employees)**



**(ii) Industries where productivity is always below the average of the overall manufacturing industry**

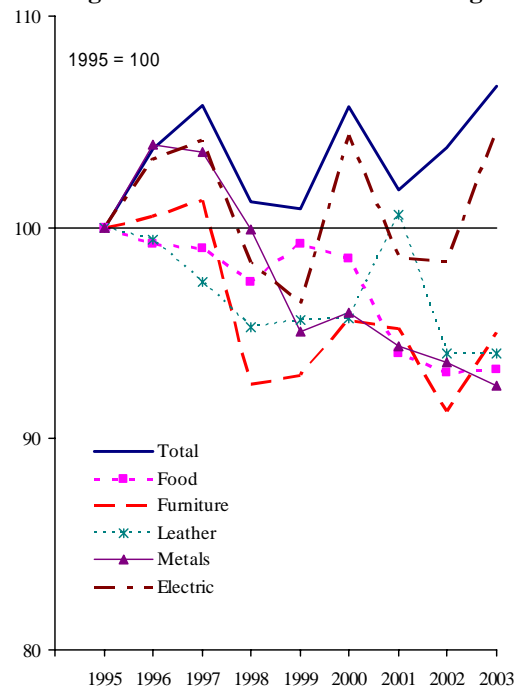
The electrical machinery, equipment, and supplies industry showed a sharp decline in the number of employees, and productivity has generally remained under the average for the overall manufacturing industry, although the level has surpassed 100 in certain individual years.

The food industry saw a shift mainly in the fourth quadrant. This is the only industry that showed an increase in the number of employees, but productivity has been on a declining trend.

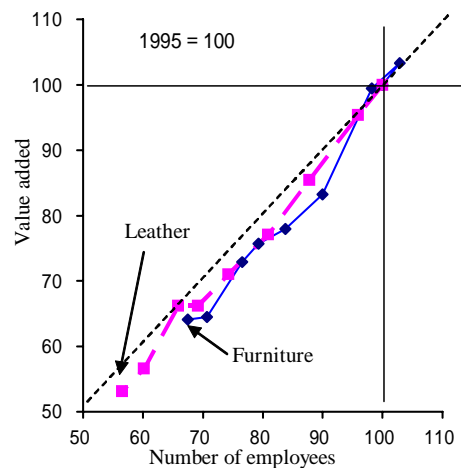
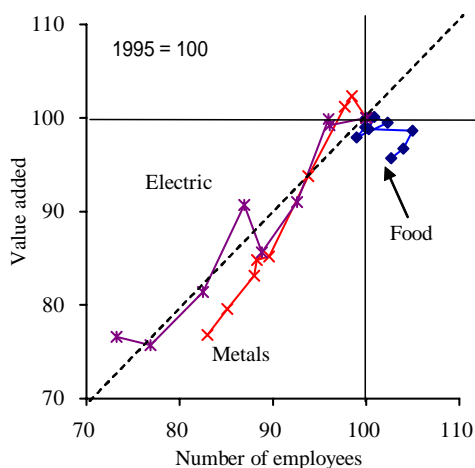
The furniture and fixtures industry, the leather tanning, leather products and fur skins industry, and the fabricated metal products industry saw a shift mainly lower right of the 45 degree line. Although the number of employees decreased significantly, productivity did not improve but further declined.

**Change in Productivity by Industry  
(Establishments with 10 or more employees)**

**Industries where productivity is always below the average of the overall manufacturing industry**

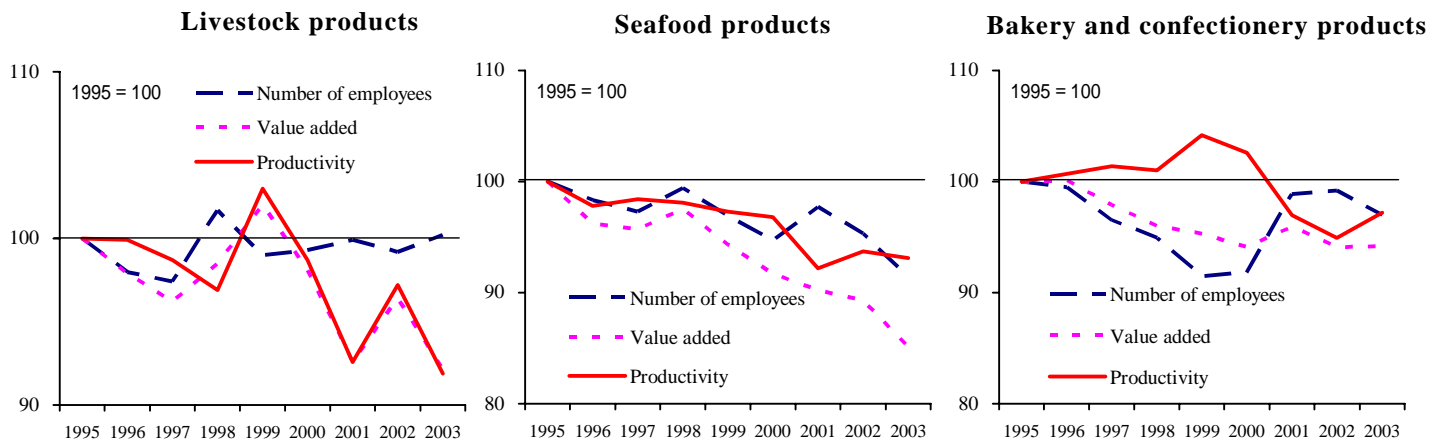


**Change in Number of Employees and Value Added by Industry  
(Establishments with 10 or more employees)**



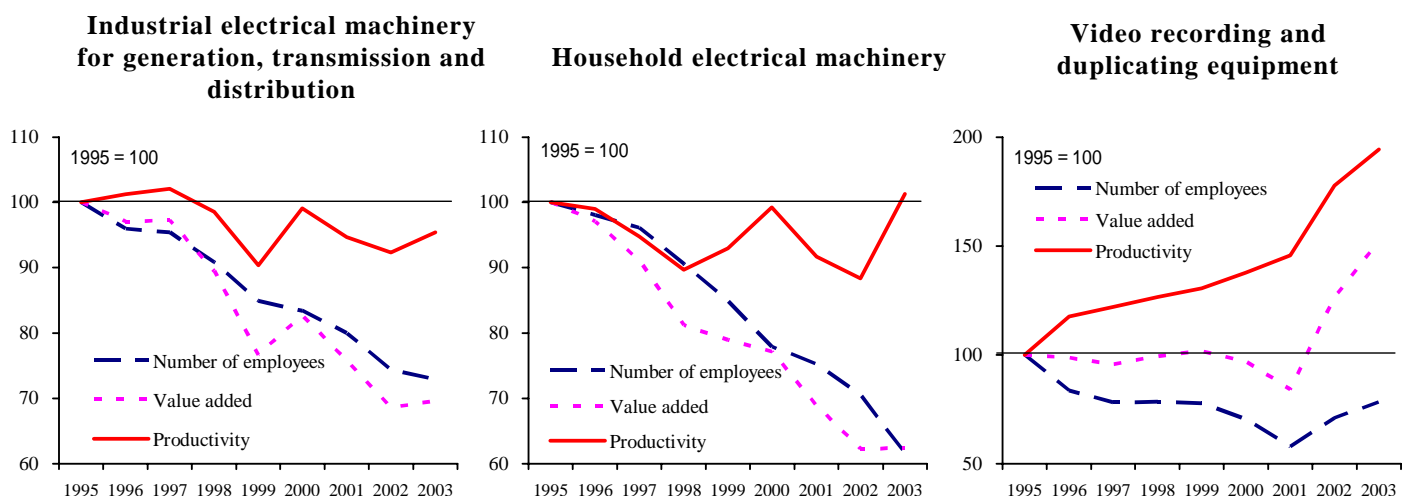
Looking at the breakdown of the food industry, “Livestock products”, “Seafood products” and “Bakery and confectionery products”, where the number of employees and value added are high, showed a decline in productivity, but the decrease in the number of employees was less than the average for the overall manufacturing industry.

**Productivity Trend in Livestock Products Industry, Seafood Products Industry,  
and Bakery and Confectionery Products Industry**  
(Establishments with 10 or more employees)



Looking at the breakdown of the electrical machinery, equipment, and supplies industry, the number of employees and value added both decreased in “Industrial electrical machinery for generation, transmission, and distribution” (so-called heavy electric machinery) and “Household electrical machinery” (so-called household appliances). These declines maintained the level of productivity. Due to favorable business conditions for digital cameras and videos with DVD/HDD, “Video recording and duplicating equipment” saw significant increases in the number of employees, value added, and productivity in 2002 and 2003.

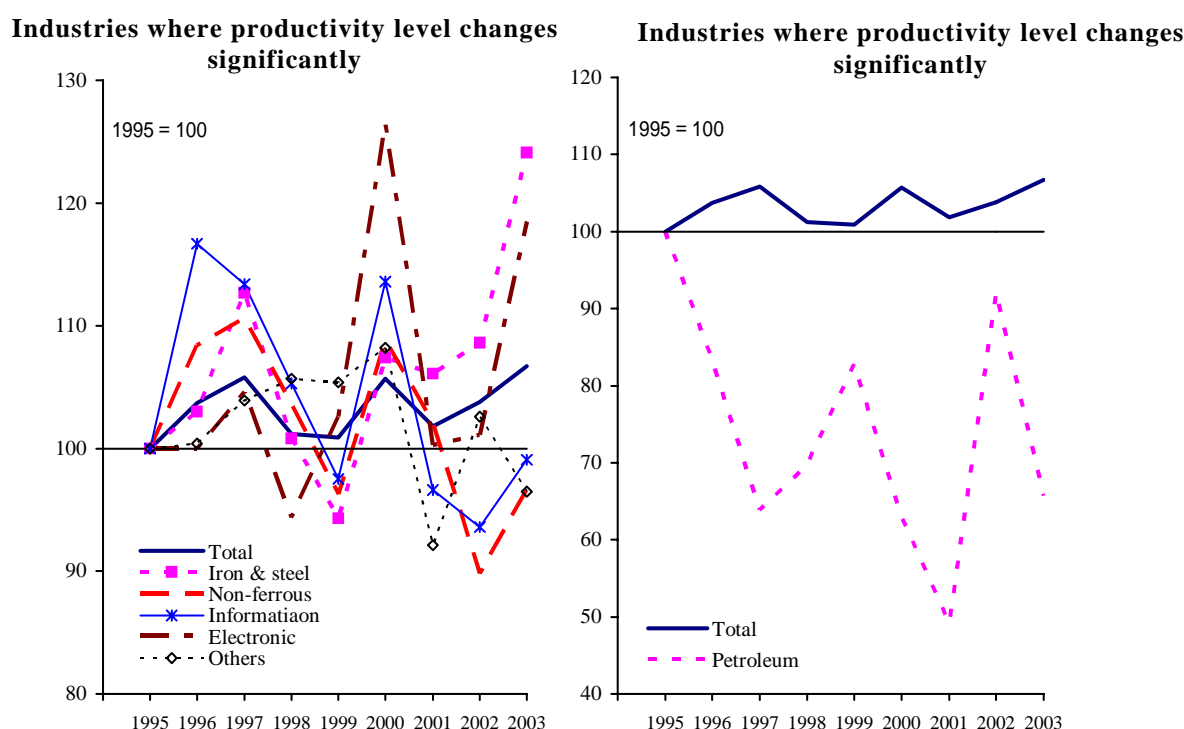
**Productivity Trend in Industrial Electrical Machinery for Generation, Transmission and  
Distribution Industry, Household Electrical Machinery Industry, and Video Recording and  
Duplicating Equipment Industry**  
(Establishments with 10 or more employees)



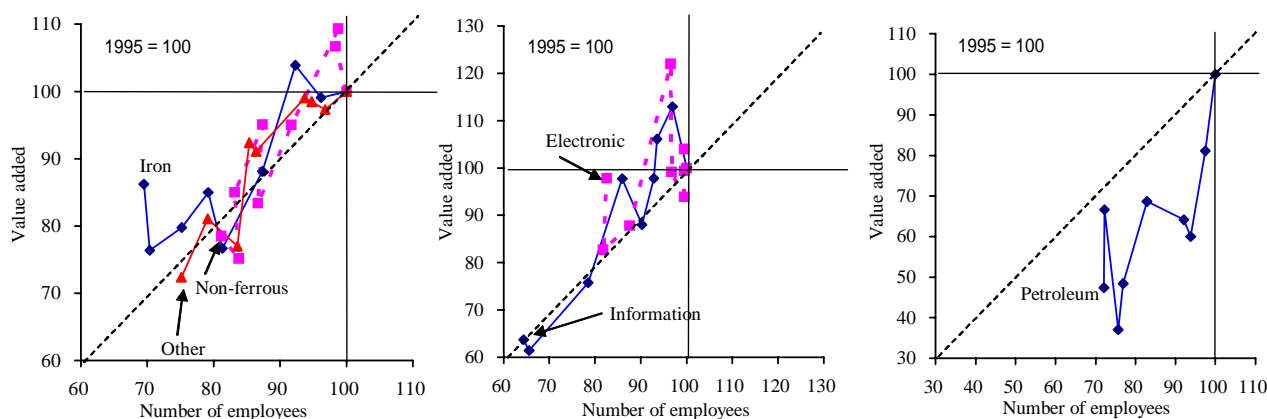
### (iii) Industries where productivity level changes significantly

In the iron and steel industry, the non-ferrous metals and products industry, the information and communication electronics equipment industry, and the electronic parts and devices industry, the number of employees has constantly decreased, but value added and productivity have showed large rises and falls. Productivity has been under 100 recently in the non-ferrous metals and products industry and the information and communication electronics equipment industry. In contrast, productivity has been over 100 in the iron and steel industry and the electronic parts and devices industry, improving significantly in 2003, with a large increase in value added due to increased demand. Significantly affected by prices of crude oil, the petroleum and coal products industry showed large rises and falls in productivity. As the oil price has been increasing, productivity has been under 100, in spite of a decrease in the number of employees.

**Change in Productivity by Industry**  
(Establishments with 10 or more employees)

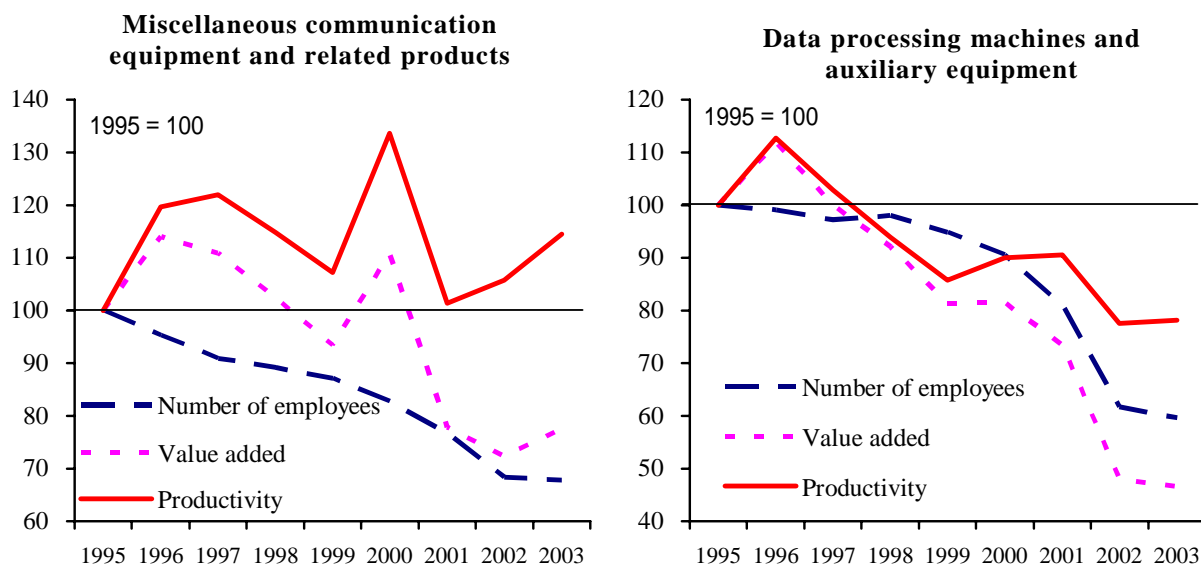


**Change in Number of Employees and Value Added by Industry**  
(Establishments with 10 or more employees)



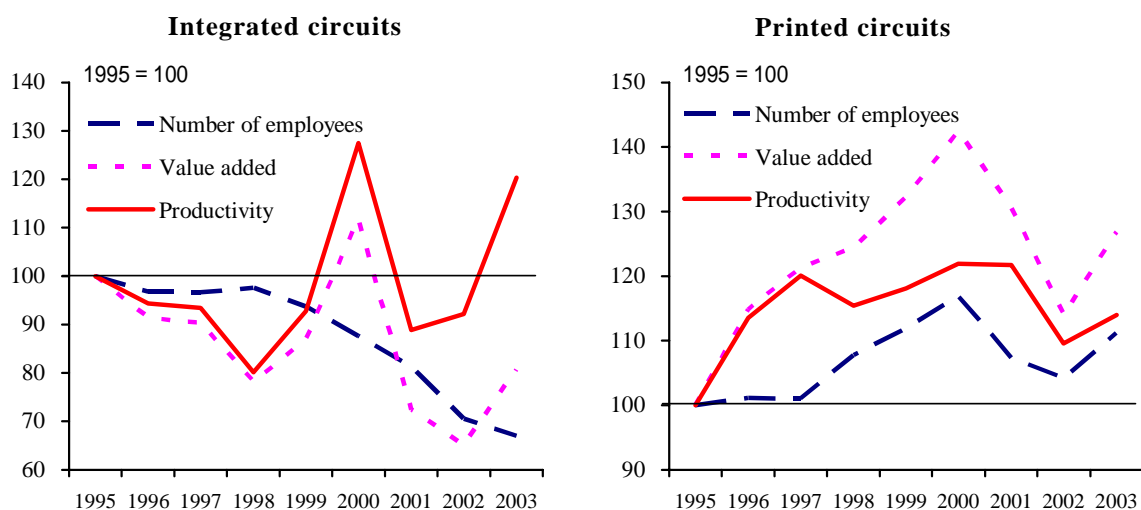
Looking at the breakdown of the information and communication electronics equipment industry, “Communication equipment” and “Data processing machines” both saw a sharp decline in the number of employees. In “Communication equipment”, value added and productivity rose in 2003 due to favorable business conditions for flat-panel TVs, such as LCD TVs. In contrast, in “Data processing machines”, value added and productivity both have been declining partly due to an overseas production shift for personal computers.

**Productivity Trend in Miscellaneous Communication Equipment and Related Products Industry and Data Processing Machines and Auxiliary Equipment Industry**  
(Establishments with 10 or more employees)



Looking at the breakdown of the electronic parts and devices industry, in the area of “Integrated circuits” with high value added, value added and productivity rose in 2003 backed by favorable business conditions for digital appliances, although the number of employees has been decreasing. In “Printed circuits”, productivity, value added, and the number of employees have all been over 100 due to an increasing demand for IT-related products and digital appliances.

**Productivity Trend in Integrated Circuits Industry and Printed Circuits Industry**  
(Establishments with 10 or more employees)



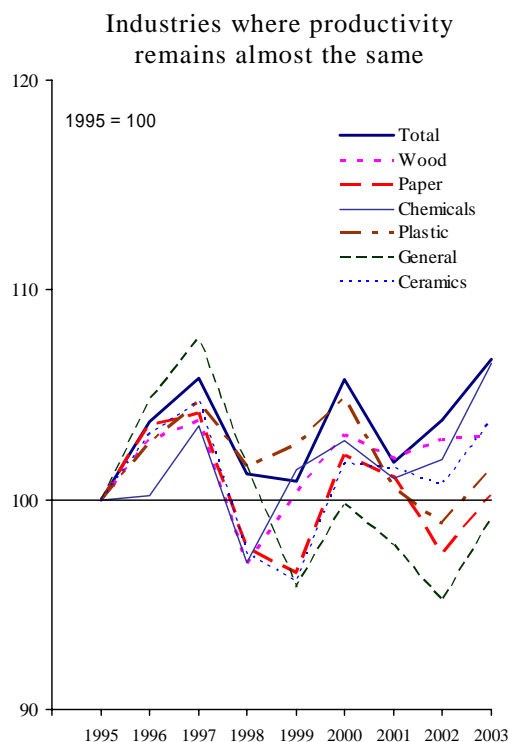


#### (iv) Industries where productivity remains almost the same

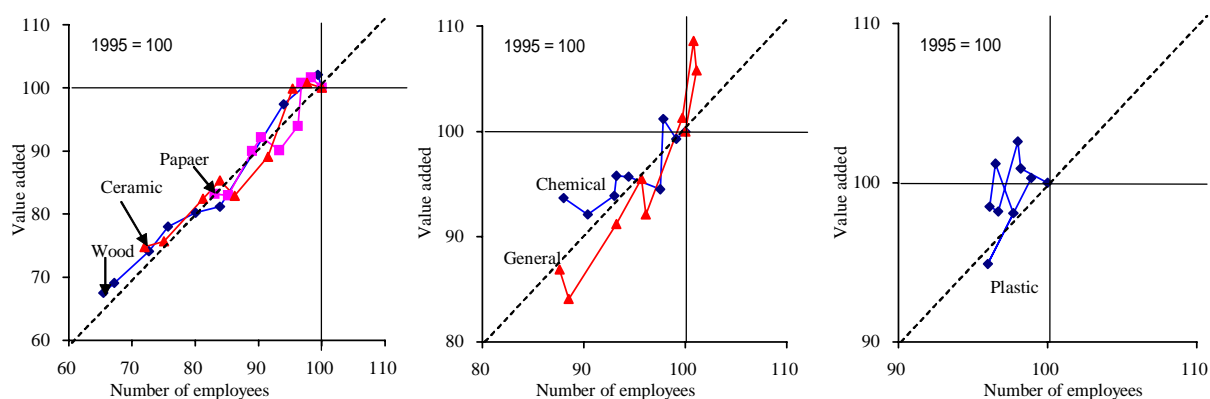
The lumber and wood products industry, the pulp, paper and paper products industry, and the ceramic, stone and clay products industry shifted around the 45 degree line. Although the number of employees has been decreasing, value added has also declined and there has been no significant improvement in productivity.

The chemical and allied products industry, the plastic products industry, and the general machinery industry showed smaller changes in the number of employees and value added, compared to other industries. Productivity has not improved significantly, either.

#### Change in Productivity by Industry (Establishments with 10 or more employees)

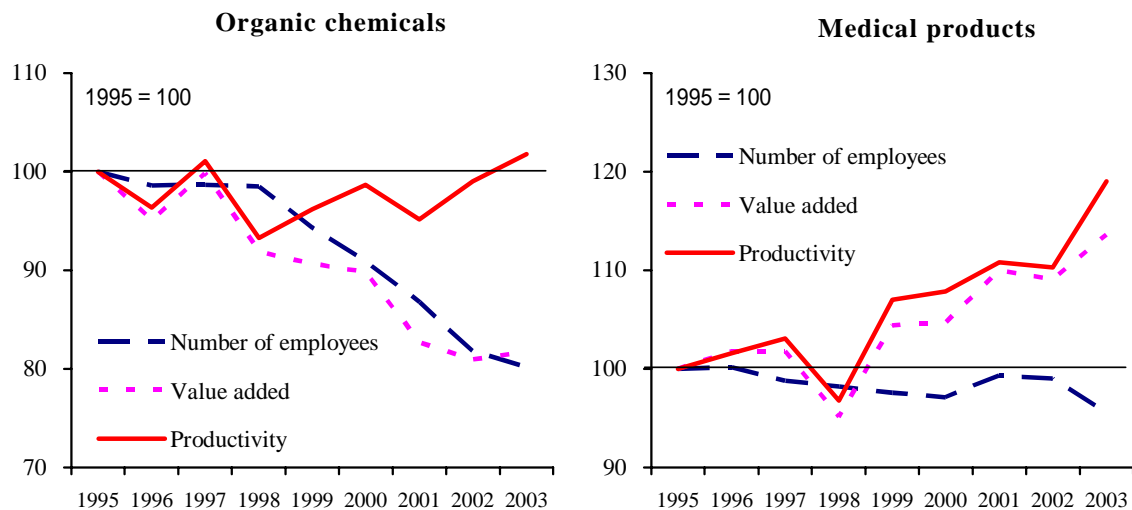


#### Change in Number of Employees and Value Added by Industry (Establishments with 10 or more employees)



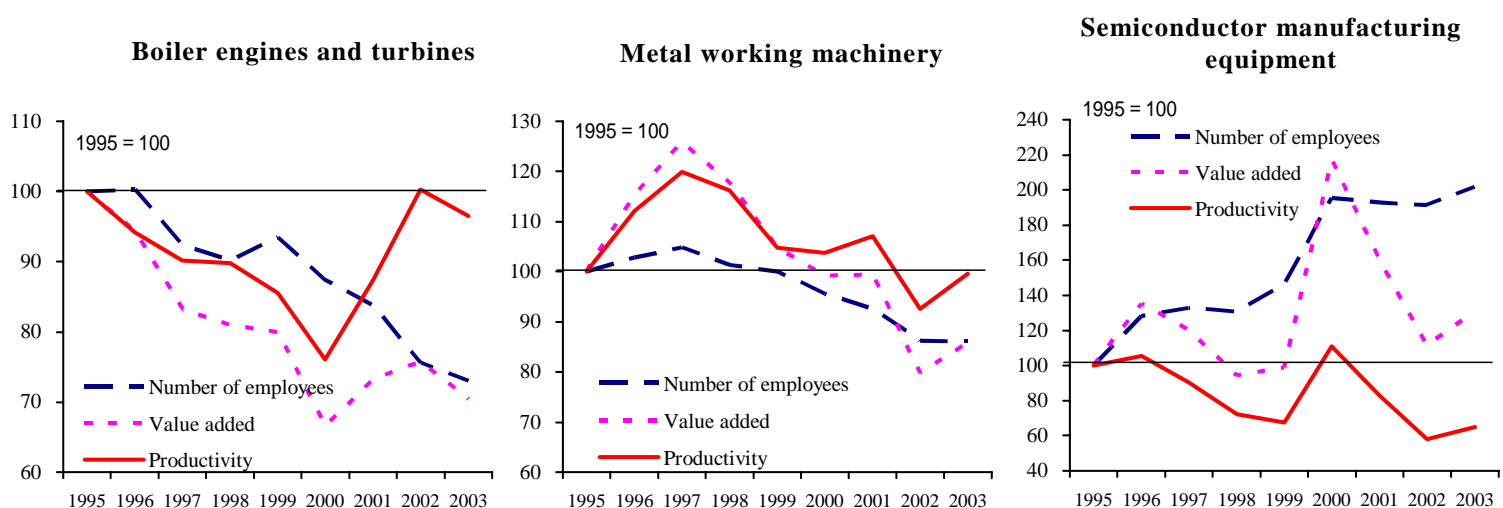
Looking at the breakdown of the chemical and allied products industry, in “Inorganic chemicals” and “Organic chemicals”, productivity has been maintained due to decreases in the number of employees and value added. In “Medical products”, productivity rose due to an increase in value added, without a sharp decrease in the number of employees.

**Productivity Trend in Organic Chemicals Industry and Medical Products Industry**  
(Establishments with 10 or more employees)



Looking at the breakdown of the general machinery industry, in “Boiler engines and turbines” and “Metal working machinery”, productivity has been maintained due to a declining trend in the number of employees and value added. In “Semiconductor manufacturing equipment”, productivity did not rise, although there has been an upward trend in the number of employees and value added.

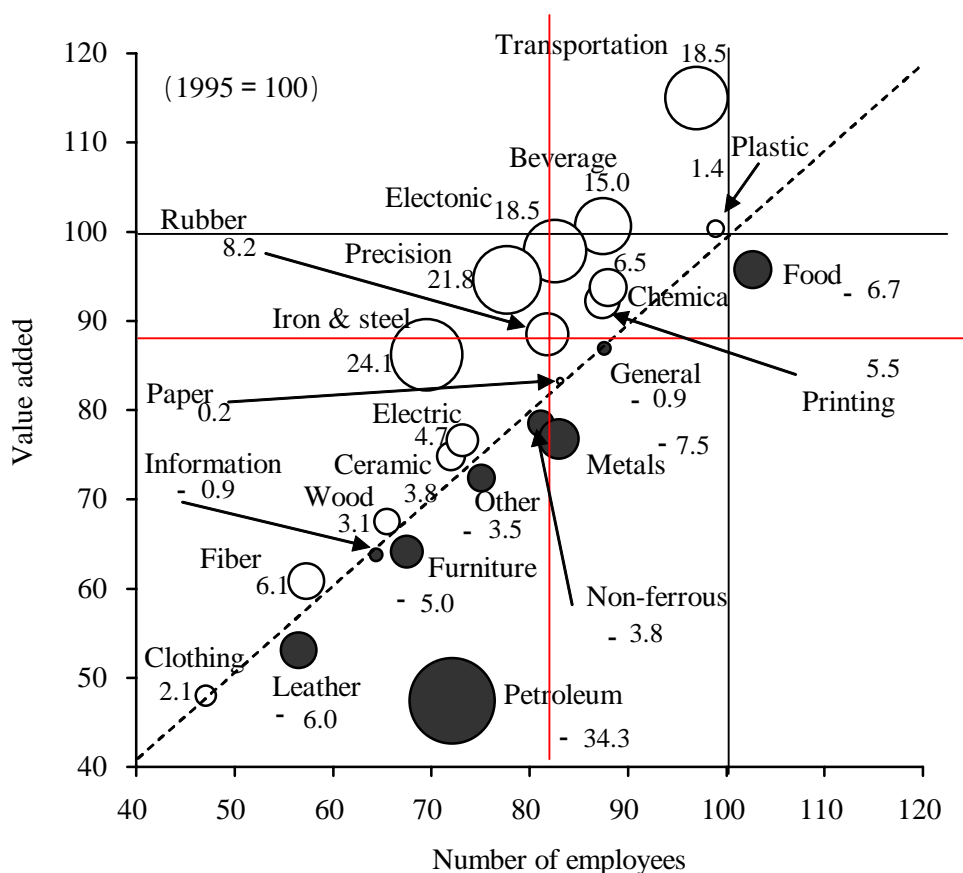
**Productivity Trend in Boiler Engines and Turbines Industry, Metal Working Machinery Industry, and Semiconductor Manufacturing Equipment Industry**  
(Establishments with 10 or more employees)



### 3. Conclusion

Productivity in the overall manufacturing industry has been on an upward trend, but improvements were mainly due to a decrease in the number of employees in many industries. However, there are some industries where the number of employees has been increasing at the same time as productivity being maintained. Productivity varies widely among industries; some industries have improved productivity and enhanced their competitiveness, while others have failed to improve productivity in spite of reducing the number of employees.

**Change in Productivity by Industry based on Number of Employees and Value Added (2003)**  
(Establishments with 10 or more employees)



\* In the graph, figures show changes in productivity (2003 – 1995), and circles show the scale of the changes.   
 indicates an increase, and indicates a decrease.

### III. Long-term Structural Changes in the Japanese Manufacturing Industries (All establishments)

We will look at the changes in the number of establishments, the number of employees, the value of manufactured goods shipments (hereinafter referred to as the “shipment value”), and industrial structures and regional structures, using the results of the survey conducted on all establishments for the first time in the period of three years following 2000.

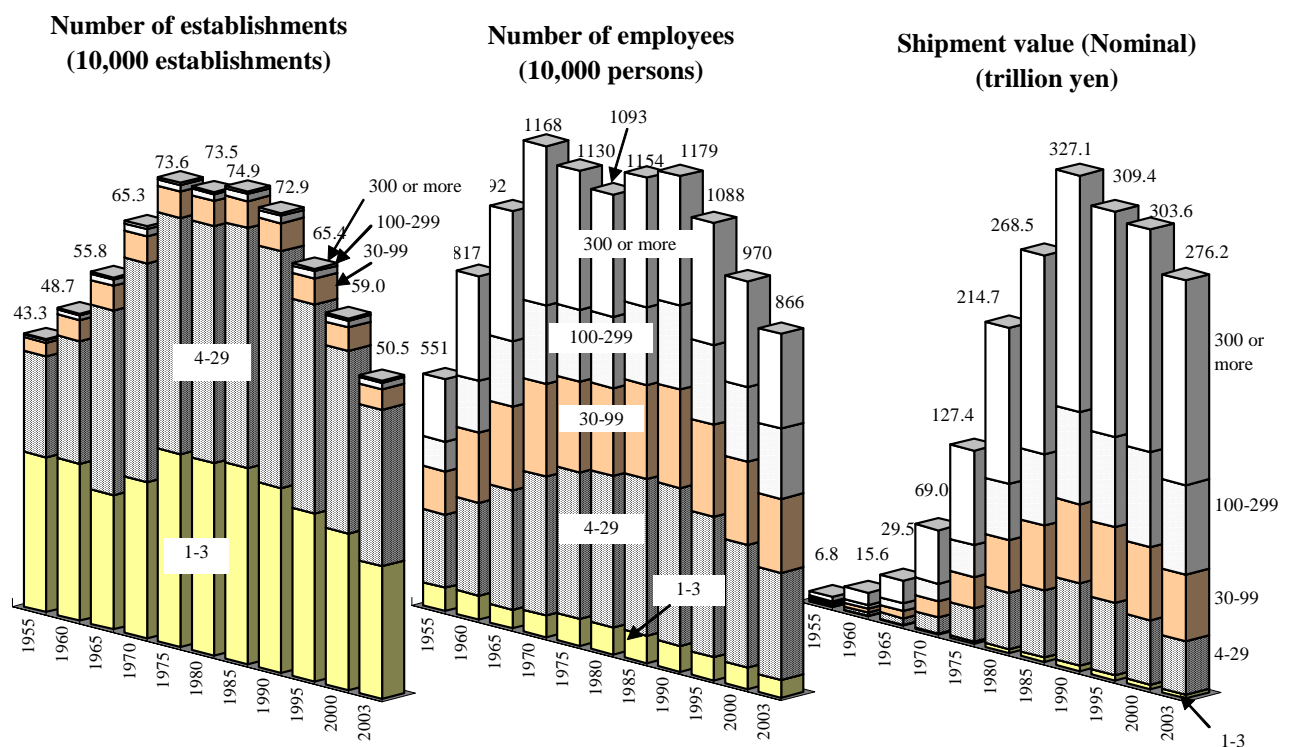
#### 1. Change in major items

The total number of manufacturing establishments was 505,000 in 2003, a decrease of 13.9%<sup>(Note1)</sup> compared to the previous survey conducted in 2000. The number of employees was 8.66 million, a decrease of 9.7% id., and shipment value was 276.2 trillion yen, a decrease of 7.5% id.

The number of establishments decreased after hitting a peak of 780,000 in 1983<sup>(Note2)</sup>. The number of employees continued to increase to 11.96 million until 1973, when the oil shock occurred, decreasing afterwards to hit bottom in 1979. After that, the number of employees rebounded, maintaining an upward trend until 1990 (11.79 million employees), and started to decrease again. Shipment value increased almost continuously, reaching 327.1 trillion yen in 1990 in the midst of the bubble economy, and then fell back.

We will look at the industrial structures of the manufacturing industries by industry and by region.

Change in Major Items (All establishments)



(Note1) Because of the revision of the Japan Standard Industrial Classification, the year-on-year comparisons are calculated by incorporating the data for 2000.

(Note2) Graphs show figures for every 5 years, but the surveys on all establishments were conducted every year from 1950 to 1985, and in years ending with 0, 3, 5, and 8 after that period. Because of the revision of the Japan Standard Industrial Classification, the newspaper industry and the printing industry were transferred to categories other than manufacturing (information and communications) after 2002, but data before 2002 include them.

## 2. By industry

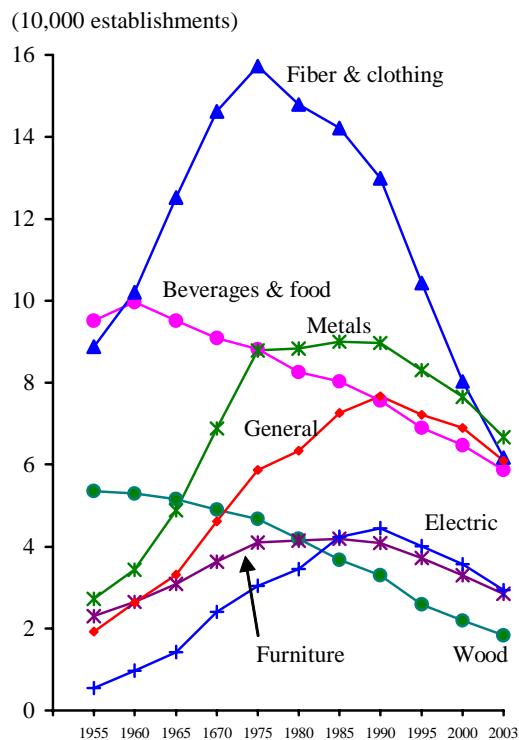
### (1) Number of establishments

By industry, the number of establishments decreased in all industries in 2003, compared to 2000.

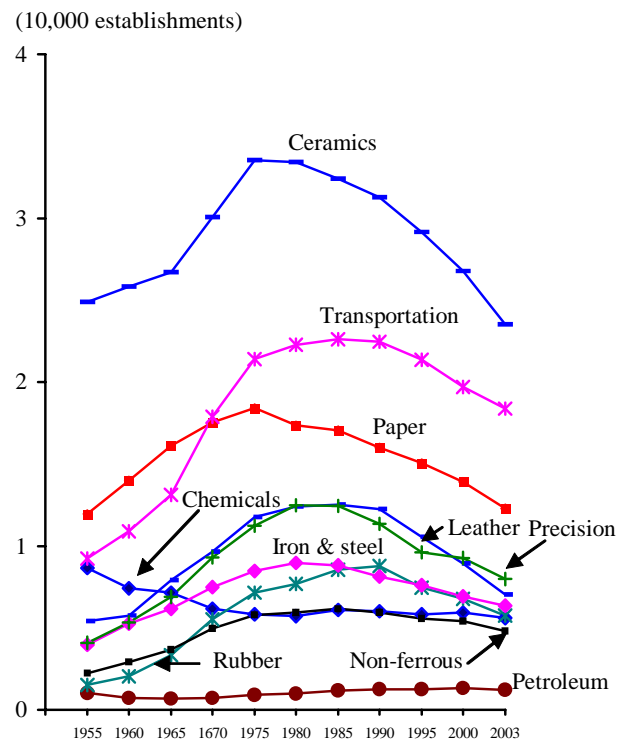
On a long-term basis, “Fibers and clothing” saw a significant decrease in the number of establishments, from 160,000 at the peak to 60,000 in 2003, a decrease of 100,000 establishments.

“Food and beverages”, “Lumber and wood products”, and “Chemical and allied products” have been on a declining trend since the war, processing industries such as “General machinery”, “Electrical machinery, equipment, and supplies”, and “Transportation equipment”, and “Fabricated metal products” decreased after hitting a peak around 1990.

**Number of Establishments by Industry 1**  
(All establishments)



**Number of Establishments by Industry 2**  
(All establishments)



Regarding long-term data on industries, industries are integrated and abbreviated as follows.

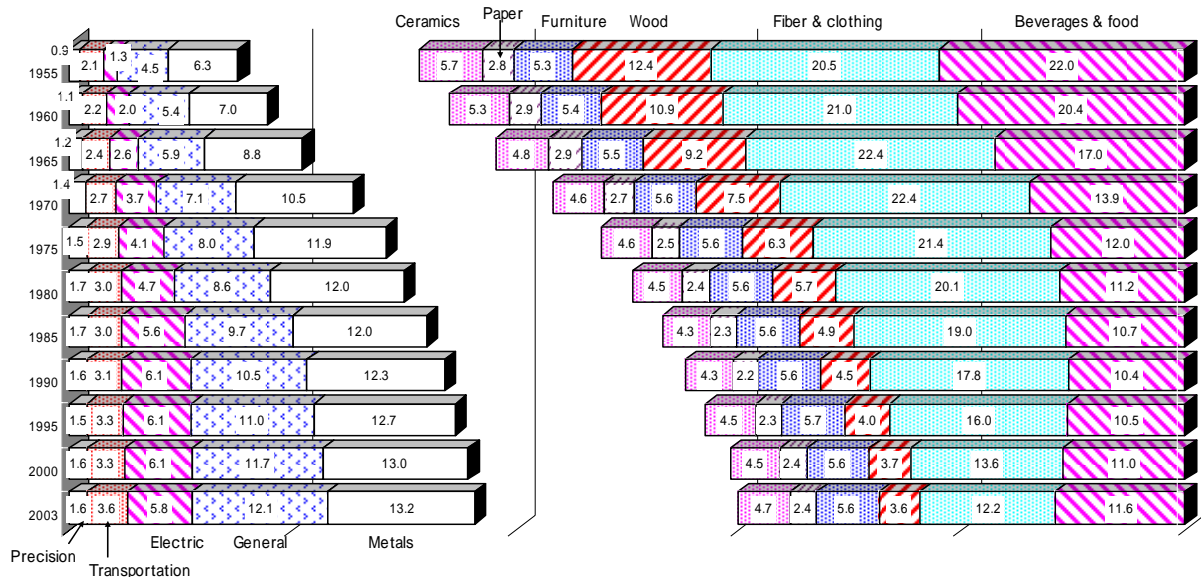
Classification	Abbreviation in text	Abbreviation in figures	Classification	Abbreviation in text	Abbreviation in figures
MANUFACTURE OF FOOD	Beverages and food	Beverages & food	MANUFACTURE OF CERAMIC, STONE AND CLAY PRODUCTS	Ceramic, stone and clay	Ceramics
MANUFACTURE OF BEVERAGES, TOBACCO AND FEED			MANUFACTURE OF IRON AND STEEL	Iron and steel	Iron & steel
MANUFACTURE OF TEXTILE MILL PRODUCTS, EXCEPT APPAREL AND OTHER FINISHED PRODUCTS MADE FROM FABRICS AND SIMILAR MATERIALS	Fiber and clothing	Fiber & clothing	MANUFACTURE OF NON-FERROUS METALS AND PRODUCTS	Non-ferrous metals and products	Non-ferrous
MANUFACTURE OF APPAREL AND OTHER FINISHED PRODUCTS MADE FROM FABRICS AND SIMILAR MATERIALS			MANUFACTURE OF FABRICATED METAL PRODUCTS	Fabricated metal products	Metals
MANUFACTURE OF LUMBER AND WOOD PRODUCTS, EXCEPT FURNITURE	Lumber and wood products	Wood	MANUFACTURE OF GENERAL MACHINERY(*)	General machinery(*)	General(*)
MANUFACTURE OF FURNITURE AND FIXTURES	Furniture and fixtures	Furniture	MANUFACTURE OF ELECTRICAL MACHINERY, EQUIPMENT AND SUPPLIES(*)	Electrical machinery, equipment and supplies(*)	Electric(*)
MANUFACTURE OF PULP, PAPER AND PAPER PRODUCTS	Pulp, paper and paper products	Paper	MANUFACTURE OF INFORMATION AND COMMUNICATION ELECTRONICS EQUIPMENT(*)		
MANUFACTURE OF CHEMICAL AND ALLIED PRODUCTS	Chemical and allied products	Chemicals	ELECTRONIC PARTS AND DEVICES(*)	Transportation equipment(*) Precision instruments and machinery(*)	Transportation (*) Precision(*)
MANUFACTURE OF PETROLEUM AND COAL PRODUCTS	Petroleum and coal products	Petroleum	MANUFACTURE OF TRANSPORTATION EQUIPMENT(*)		
MANUFACTURE OF RUBBER PRODUCTS	Rubber products	Rubber	MANUFACTURE OF PRECISION INSTRUMENTS AND MACHINERY(*)	-	-
MANUFACTURE OF LEATHER TANNING, LEATHER PRODUCTS AND FUR SKINS	Leather tanning, leather products and fur	Leather	MISCELLANEOUS MANUFACTURING INDUSTRIES(Note)		

(Note 1) "Plastic products" are included in "Miscellaneous manufacturing industries". "Publishing, printing, and allied industries" and "Printing and allied industries" are omitted.

(Note 2) (\*) indicates processing industries.

The composition ratio of the number of establishments by industry has been expanding in processing industries such as “General machinery”, “Electrical machinery, equipment and supplies”, “Transportation equipment” and “Fabricated metal products”, and has been declining significantly in “Fabric and clothing”, “Lumber and wood products” and “Beverages and food”.

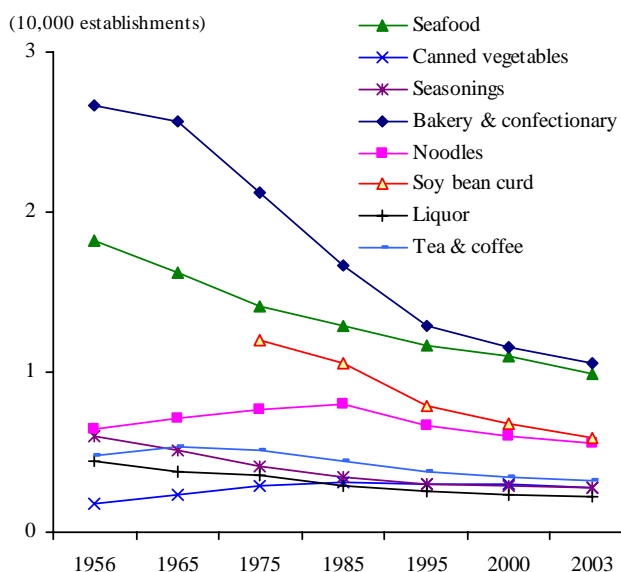
### Change in Composition Ratio of Number of Establishments by Industry (%) (All establishments)



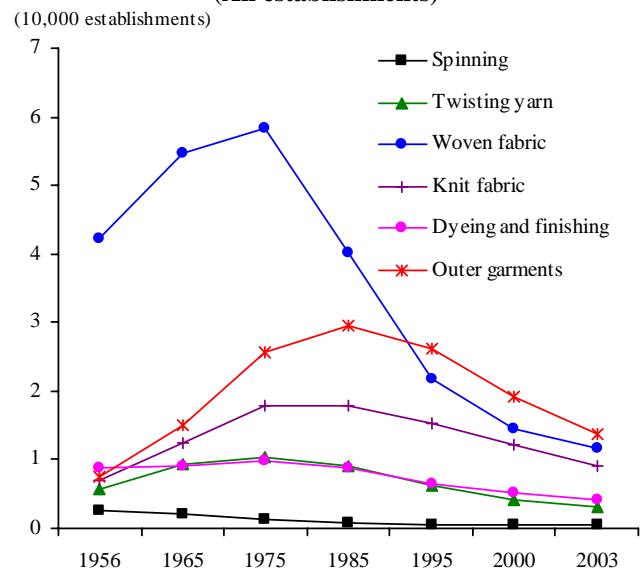
Looking at the breakdown of “Beverages and food”, the number of establishments was largest in “Bakery and confectionery products” and “Seafood products” during the 1955 to 1965 period, but decreased sharply afterwards. The number of establishments in “Noodles”, “Soy bean curd and fried bean curd” and “Liquor” has also been decreasing.

In “Fiber and clothing”, the number of establishments had been large in “Fabrics”, but has decreased significantly after hitting a peak in 1975.

### Change in Number of Establishments of Beverages and Food (All establishments)



### Change in Number of Establishments of Fiber and Clothing (All establishments)



Note: Some classifications of industries differ before and after 1955. Therefore, data for 1956 are used here. Hereinafter the same.

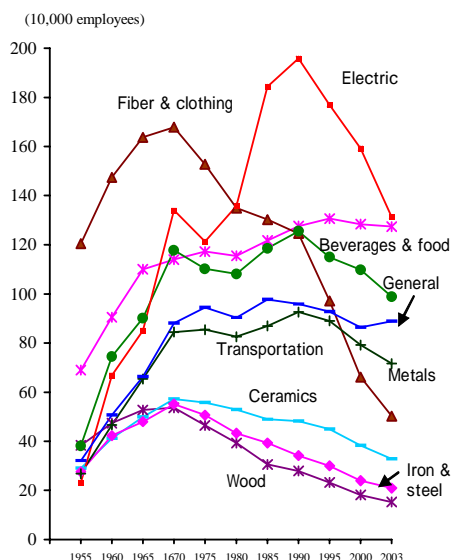
## (2) Number of employees

By industry, the number of employees decreased in all industries in 2003, compared to 2000.

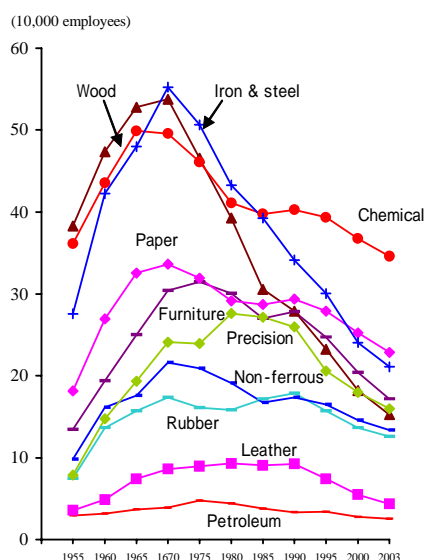
“Fibers and clothing”, which used to have the largest number of employees in the overall manufacturing industry (approximately 1.6 million employees at the peak), decreased significantly to under 600,000 in 2003. “Lumber and wood products”, “Iron and steel”, “Chemical and allied products”, “Pulp, paper, and paper products” and “Non-ferrous metals and products” also saw decreases after hitting a peak around 1970.

In contrast, “Electrical machinery, equipment, and supplies” and “General machinery” hit a peak around 1990. However, these industries also saw significant decreases recently due to increases in imported goods and an overseas production shift.

**Number of Employees by Industry 1  
(All establishments)**

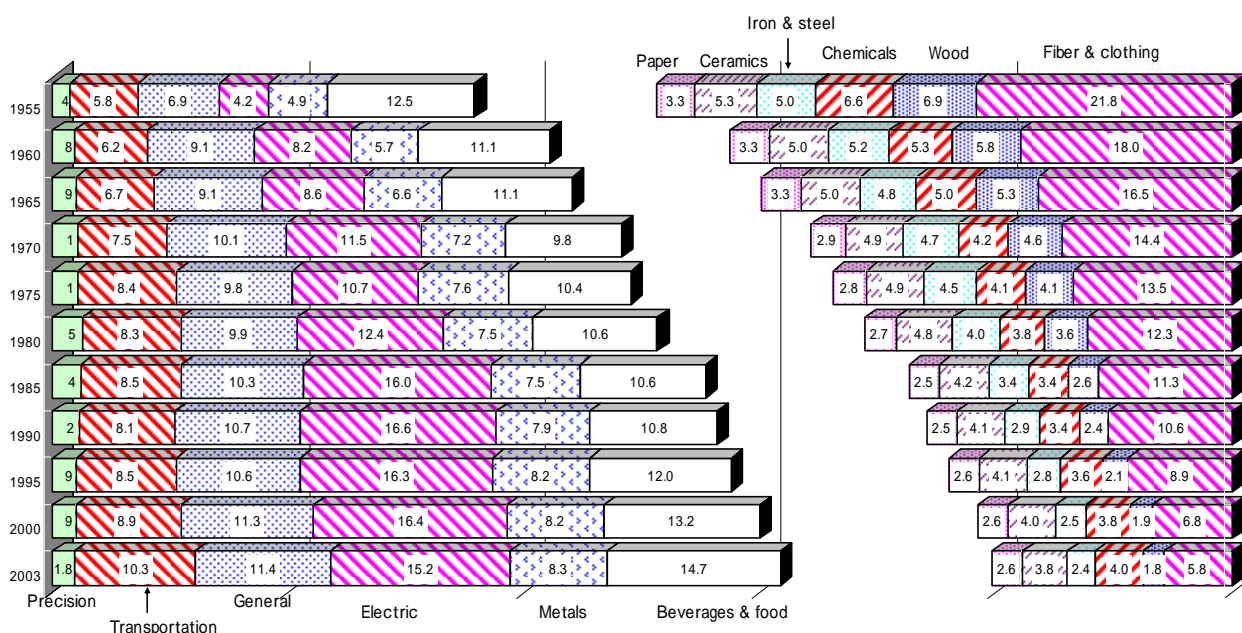


**Number of Employees by Industry 2  
(All establishments)**



The composition ratio of the number of employees by industry has been expanding in processing industries such as “General machinery”, “Transportation equipment”, “Electrical machinery, equipment and supplies”, and “Fabricated metal products”, and has been decreasing in “Fabric and clothing” and “Lumber and wood products”.

**Change in Composition Ratio of Number of Employees by Industry (%) (All establishments)**



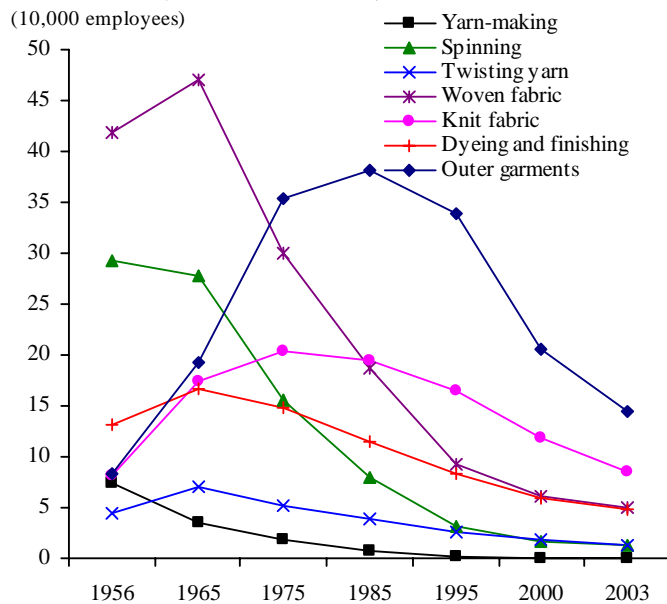
Note: Composition ratios up to 2000 include “Newspaper” and “Publishing”.



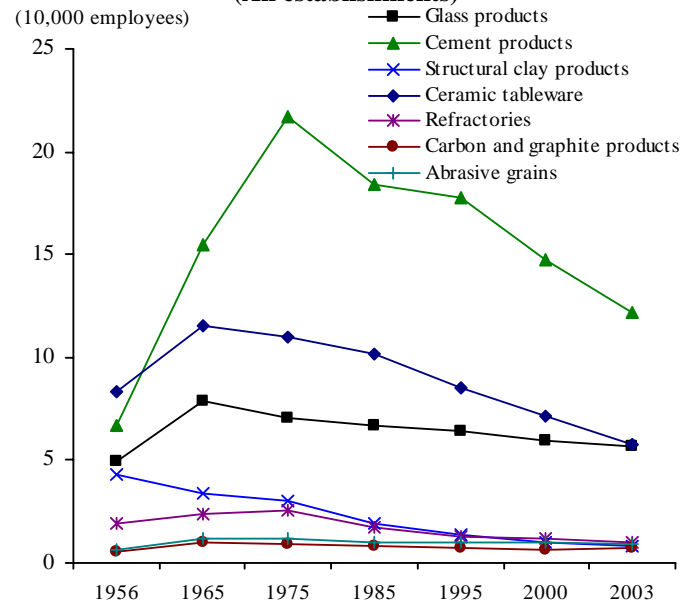
In “Fiber and clothing”, “Woven fabric” saw a decrease in the number of employees after hitting a peak in 1965, when “Outer garments” started to increase. However, “Outer garments” also decreased afterwards, after hitting a peak in 1985.

In “Ceramic, stone and clay products”, “Cement and cement products” showed a significant increase until 1975, but decreased afterwards.

**Change in Number of Employees of Fiber and Clothing Establishments (All establishments)**



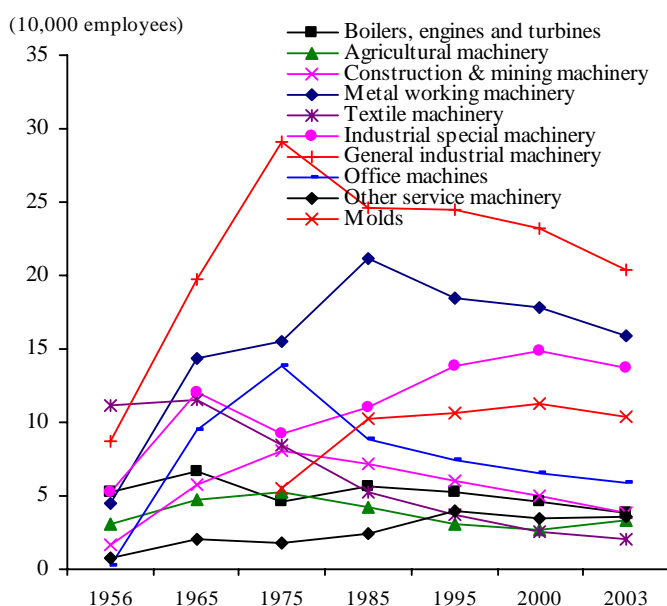
**Change in Number of Employees of Ceramic, Stone and Clay Products Establishments (All establishments)**



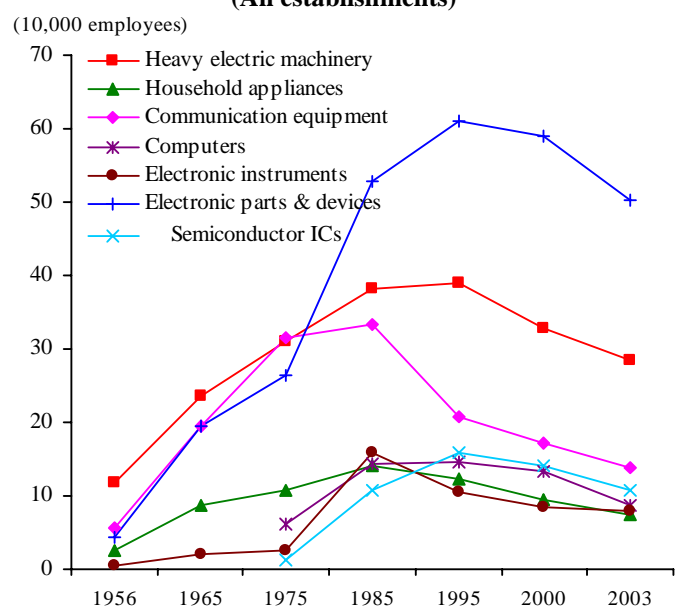
In “General machinery”, “Textile machinery” used to have the largest number of employees in 1956, but saw a declining trend afterwards. Meanwhile, “General industrial machinery” and “Metal working machinery” saw an increase.

In “Electrical machinery, equipment and supplies”, “Electronic parts and devices” saw a significant increase, due to development in micro electronics and expansion of exports from 1975 to 1984, and due to increases for IT-related products, such as cellular telephones and digital appliances, such as digital cameras, liquid crystal TVs, and DVD recorders in recent years.

**Change in Number of Employees of General Machinery (All establishments)**



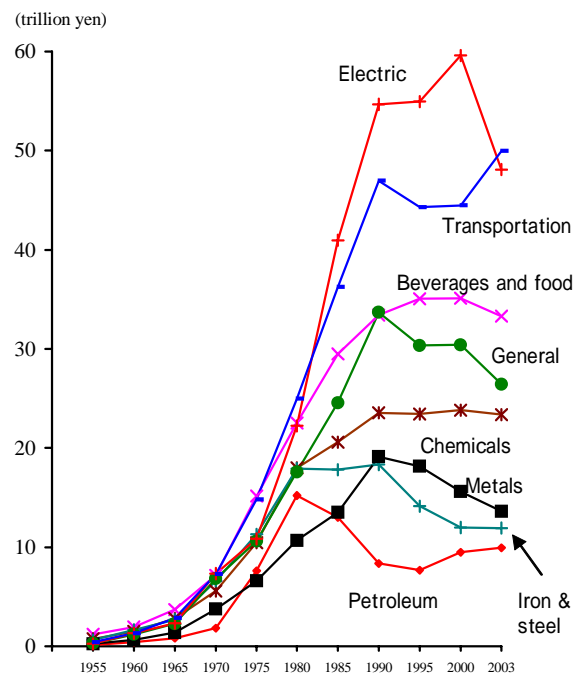
**Change in Number of Employees of Electrical Machinery, Equipment and Supplies (All establishments)**



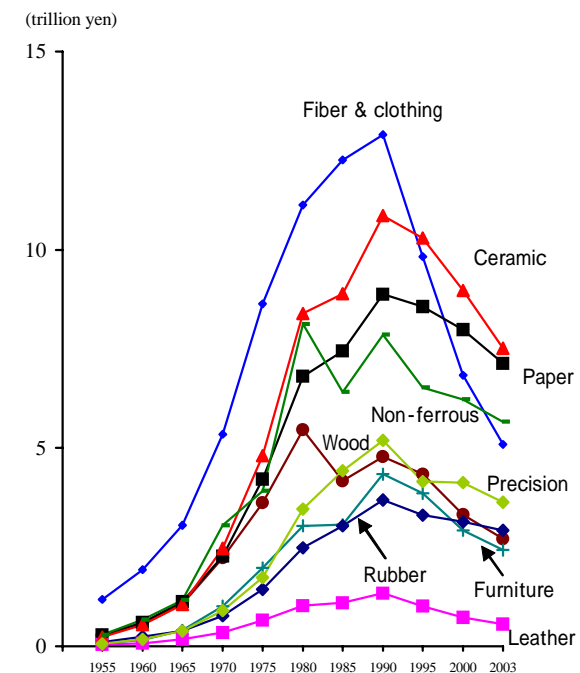
### (3) Shipment value

By industry, shipment value in the overall manufacturing industry has decreased since 1990, but there were increases in 2003 compared to 2000 for the two industries of “Transportation equipment” and “Petroleum and coal products”. The increase for “Transportation equipment” and “Petroleum and coal products” was due to rise in the oil price. In contrast, “Electrical machinery, equipment, and supplies” has seen decreases due to increases in imported goods and an overseas production shift, after hitting a peak in 2000.

**Number of Establishments by Industry 1  
(All establishments)**

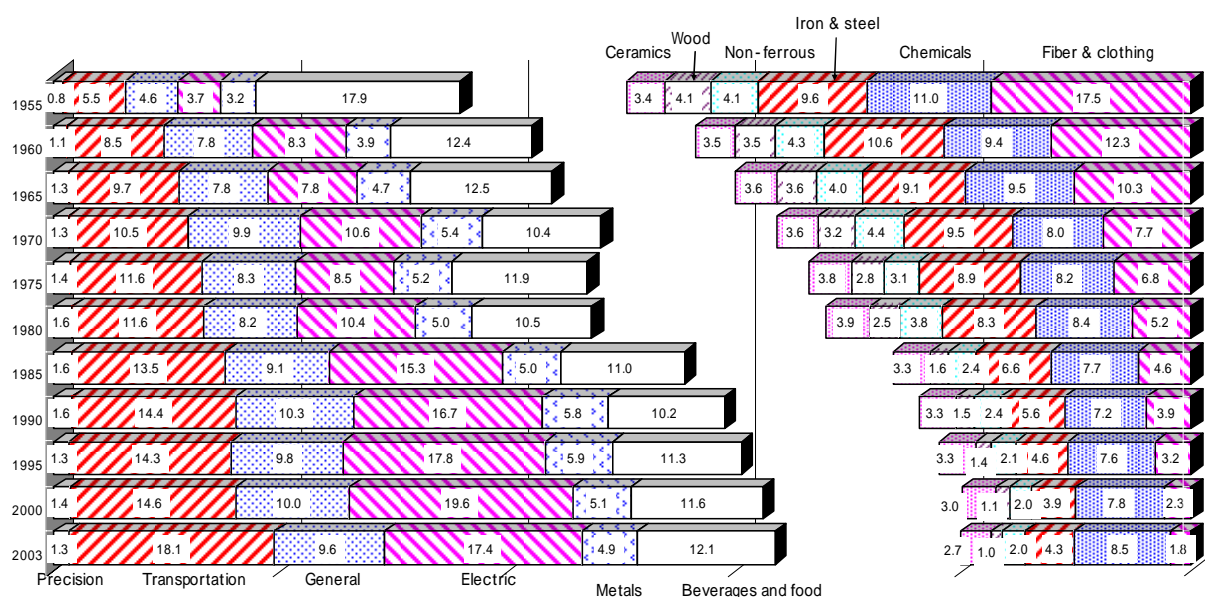


**Number of Establishments by Industry 2  
(All establishments)**



The composition ratio of shipment value by industry has been expanding in processing industries such as “General machinery”, “Electrical machinery, equipment and supplies”, and “Transportation equipment”, and has been decreasing in “Fabric and clothing”, “Lumber and wood products”, and “Iron and steel”.

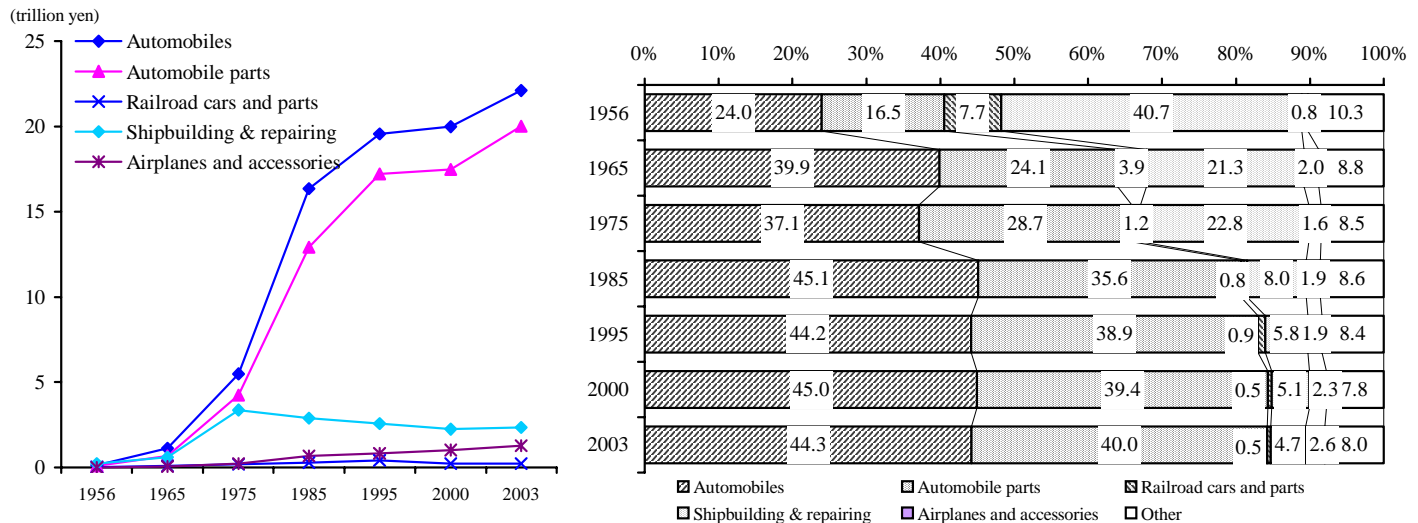
**Change in Composition Ratio of Number of Employees by Industry (%) (All establishments)**



Note: Composition ratios until 2000 include “Newspaper” and “Publishing”

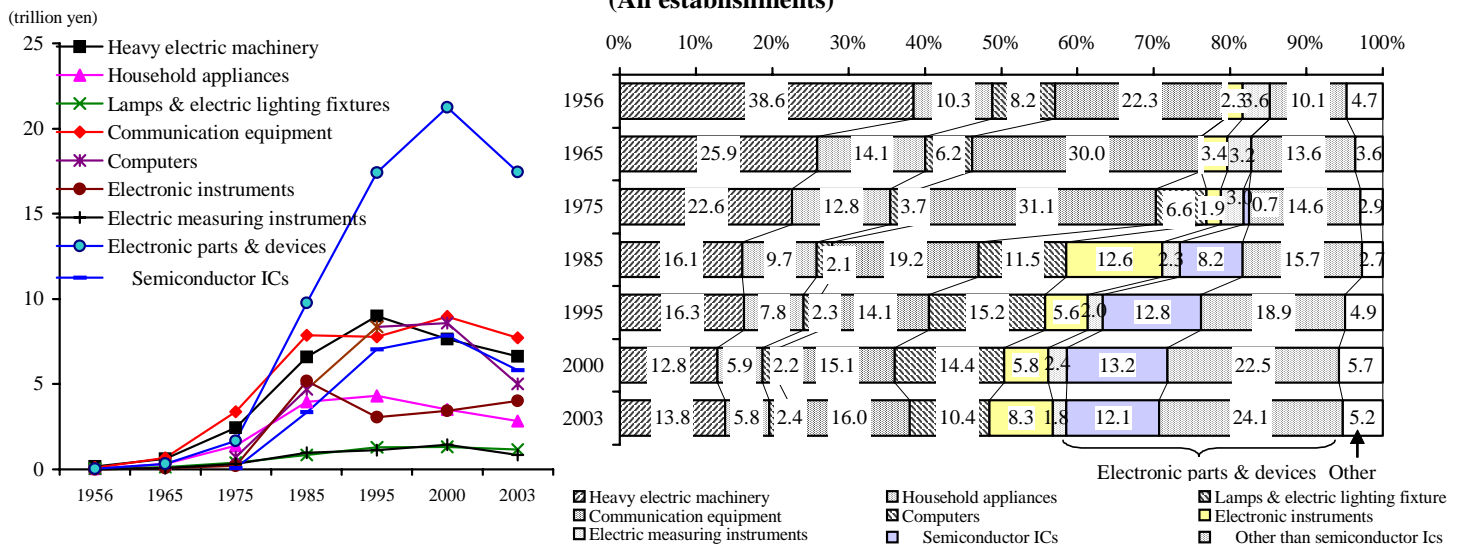
In “Transportation equipment”, the ratio of “Shipbuilding and repairing” was highest in 1956, but decreased significantly afterwards. In contrast, “Automobiles” and “Automobile parts” expanded greatly from 1965 to 1974, due to progress in the boom in private car ownership and motorization. From 1975 to 1984, “Automobiles” and “Automobile parts” increased their weight because exports to the U.S. and Europe increased, enjoying popularity as energy-saving economy cars.

### Change in Shipment Value and Composition Ratio of Transportation Equipment (All establishments)



In “Electrical machinery, equipment and supplies”, the ratio of “Heavy electric machinery” was highest in 1956, but the major commodities have changed in turn from household appliances to TVs and audio equipment, VTRs, computers, cellular telephones, and digital appliances. In 2003, “Electronic parts and devices” had the highest weight.

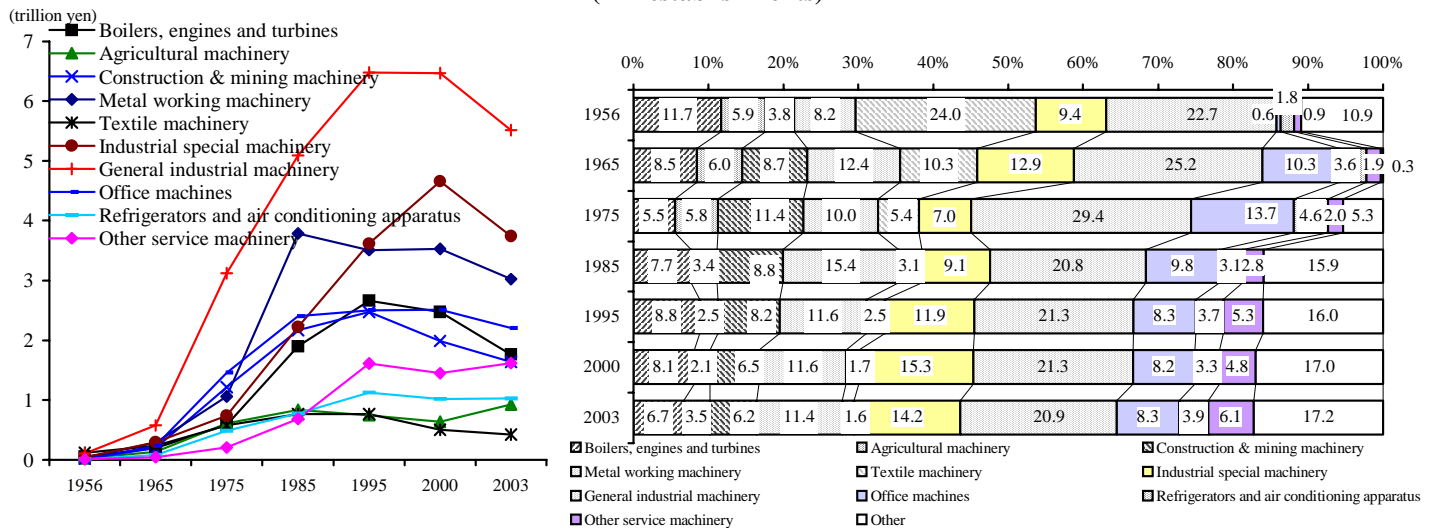
### Change in Shipment Value and Composition Ratio of Electric Machinery, Equipment and Supplies (All establishments)



Note: “TVs and audio equipment” is included in “Communication equipment”, and “VTRs” in “Electronic instruments”.

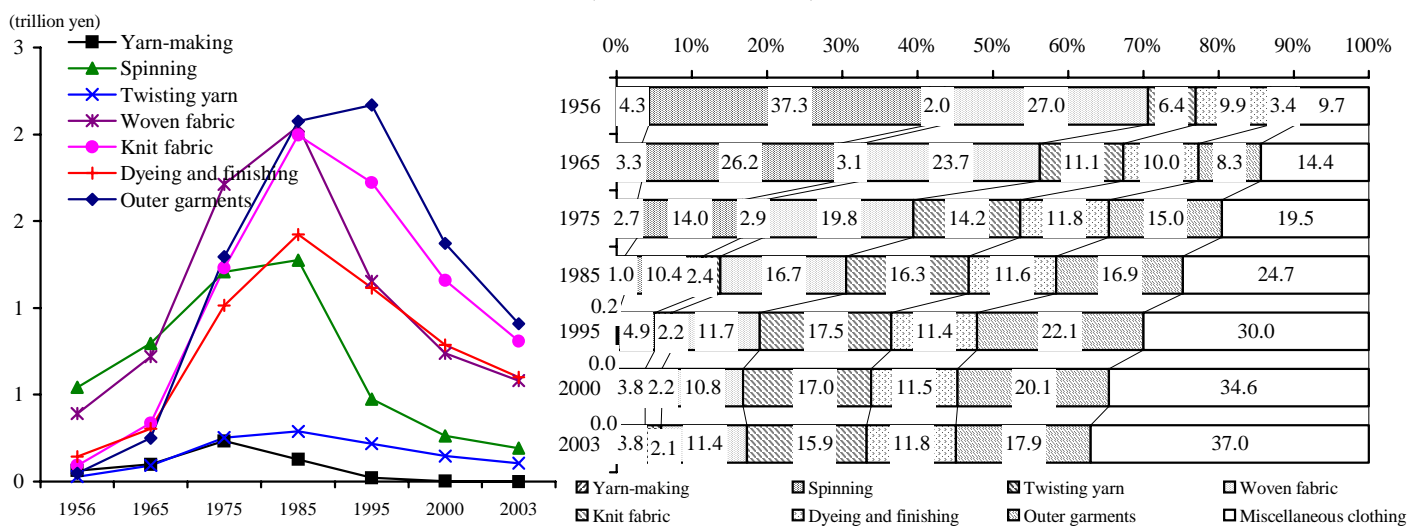
In the “General machinery” area, the ratio of “Textile machinery” was highest in 1956, but decreased significantly afterwards. Replacing the position of “Textile machinery”, the ratio expanded for “Metal processing machinery”, such as metal working machinery and “Machinery for construction”, and then for “Industrial special machinery” including semiconductor manufacturing equipment, and “Miscellaneous service machinery” including pachinko and slot machines.

**Change in Shipment Value and Composition Ratio of General Machinery**  
(All establishments)



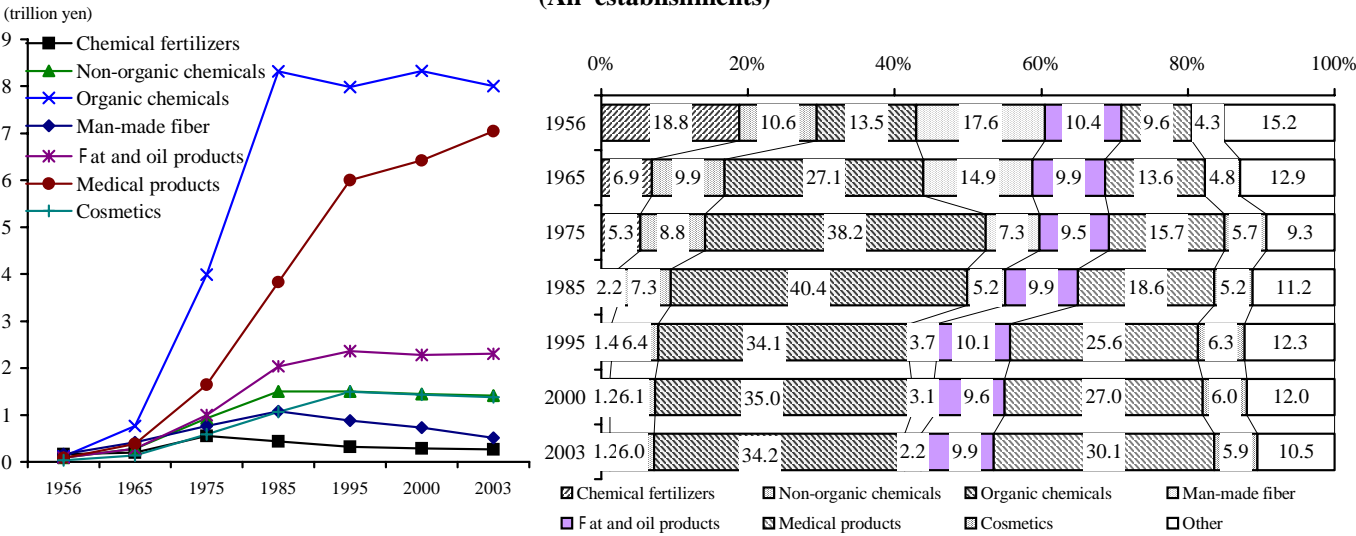
In “Fiber and clothing”, the composition ratio shifted from upstream (“Spinning” and “Woven fabric”) to downstream (“Outer garments” and “Miscellaneous clothing”).

**Change in Shipment Value and Composition Ratio of Fiber and Clothing**  
(All establishments)



In “Chemical and allied products”, the overall ratio has not changed so significantly compared to other industries. However, a high ratio shifted largely from industries such as “Chemical fertilizers” and “Man-made fiber”, to “Organic chemicals”, and then to “Medical products”.

Change in Shipment Value and Composition Ratio of Chemicals  
(All establishments)



### 3. By region

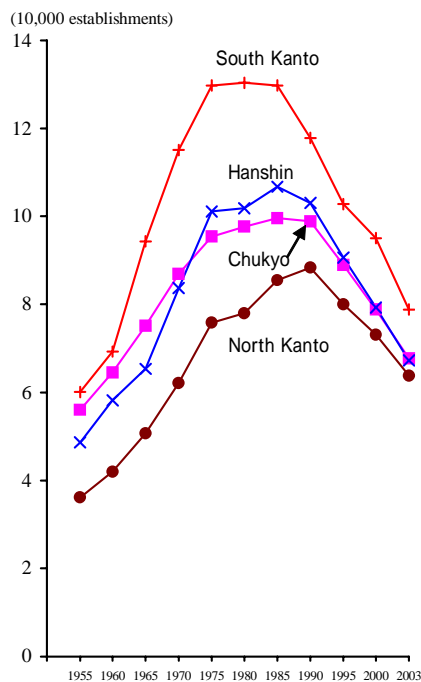
#### (1) Number of establishments

By region, the number of establishments decreased in all regions in 2003, compared to 2000.

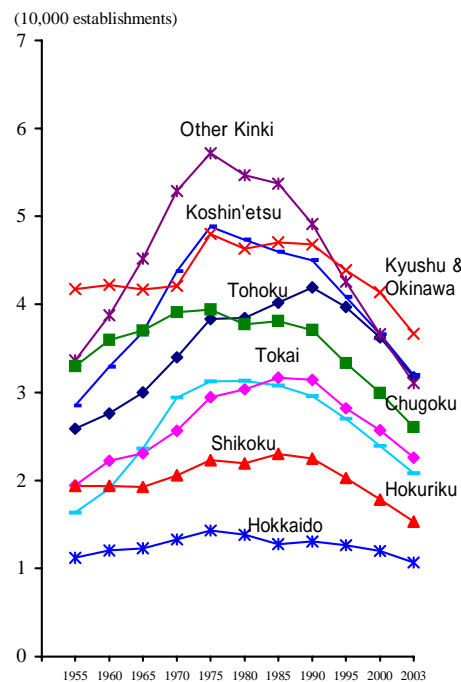
In particular, decreases were significant in regions including three major cities: “South Kanto”, “Hanshin” and “Chukyo”.

On a long-term basis, the composition ratio of “South Kanto” and “Hanshin” has been declining, while that of “Tohoku”, “North Kanto” and “Kyushu and Okinawa” has been expanding..

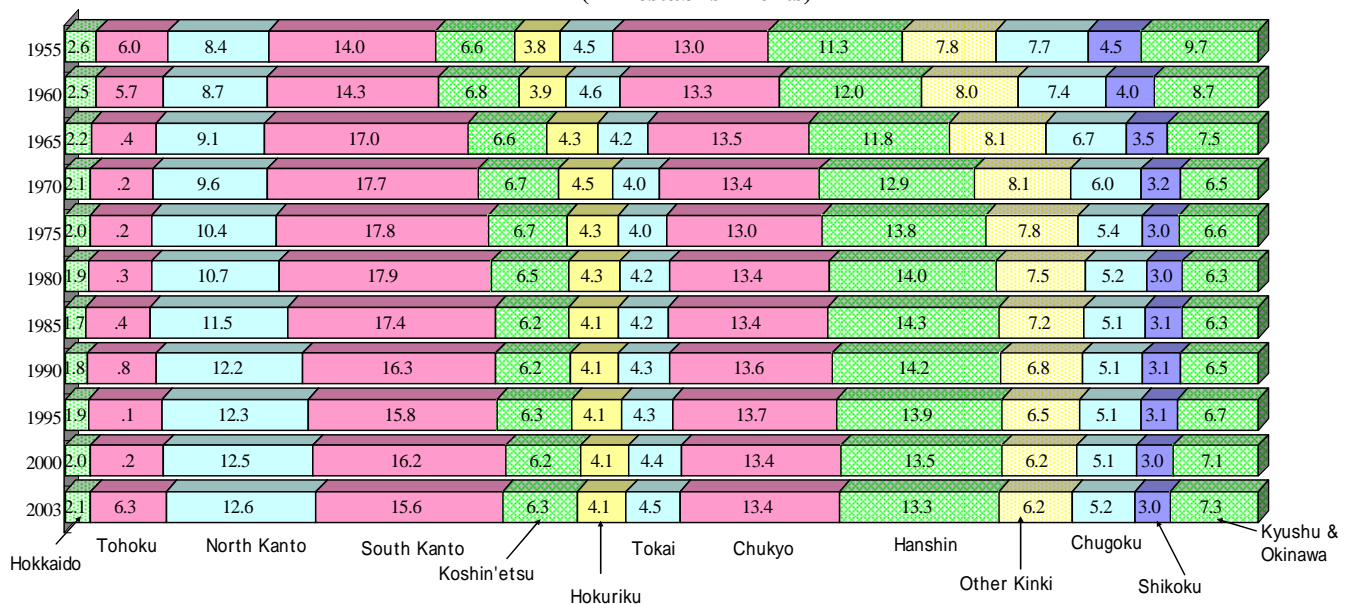
**Number of Establishments by Region 1  
(All establishments)**



**Number of Establishments by Region 2  
(All establishments)**



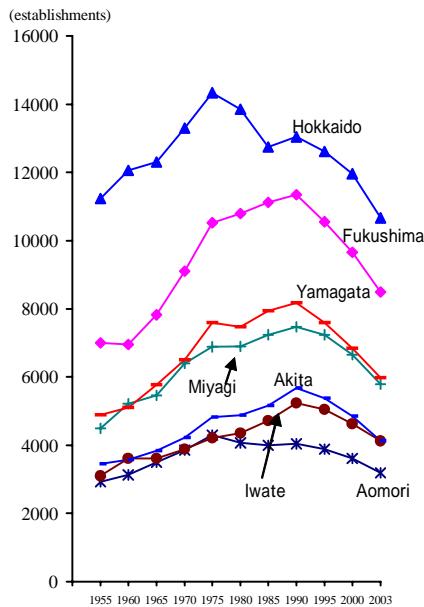
**Change in Composition Ratio of Number of Establishments by Region (%)  
(All establishments)**



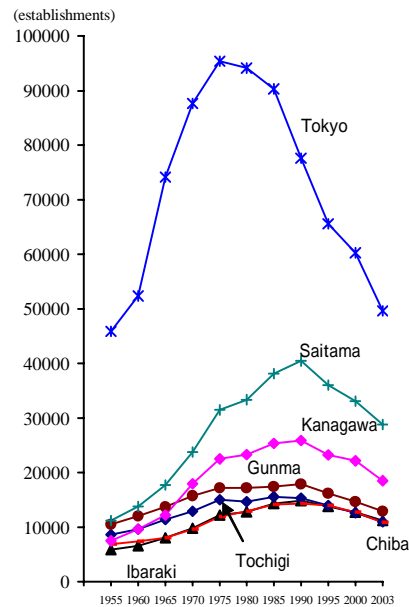
Hokkaido/ Tohoku (Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima)/ North Kanto (Ibaraki, Tochigi, Gunma, Saitama)/ South Kanto (Chiba, Tokyo, Kanagawa)/ Koshin'etsu (Yamanashi, Nagano, Niigata)/ Hokuriku (Toyama, Ishikawa, Fukui)/ Tokai (Shizuoka)/ Chukyo (Gifu, Aichi, Mie)/ Hanshin (Osaka, Hyogo)/ Other Kinki (Shiga, Kyoto, Nara, Wakayama)/ Chugoku (Tottori, Shimane, Okayama, Hiroshima, Yamaguchi)/ Shikoku (Tokushima, Kagawa, Ehime, Kochi)/ Kyushu & Okinawa (Fukuoka, Saga, Nagasaki, Kumamoto, Oita, Miyazaki, Kagoshima, Okinawa)

## Change in Number of Establishments by Prefecture (All establishments)

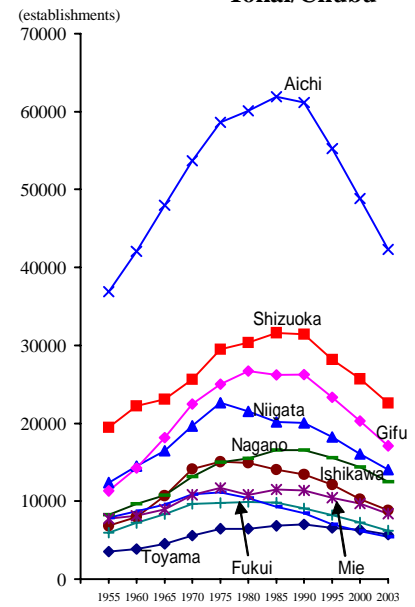
### Hokkaido/Tohoku



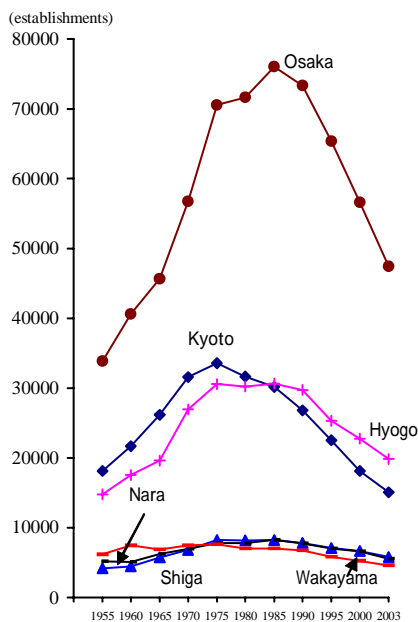
### Kanto



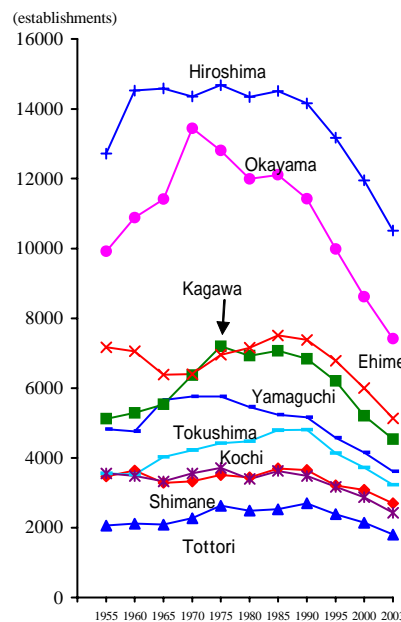
### Koshin'etsu/Hokuriku/ Tokai/Chubu



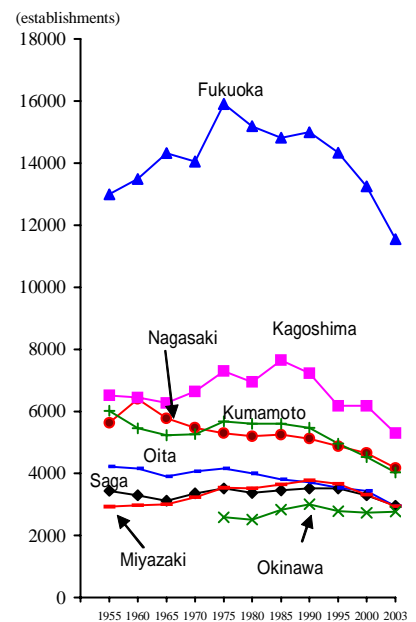
### Kinki



### Chugoku/Shikoku



### Kyushu/Okinawa



Note: Because of the revision of the Japan Standard Industrial Classification in 2002, "Newspaper" and "Publishing" were transferred to "Information services". For Tokyo and Osaka, where these industries have high weight, data lack continuity. Therefore, figures by region and prefecture before 2000 were based on data calculated by using the Y/Y growth rate. Note that figures do not match with those published in the past.

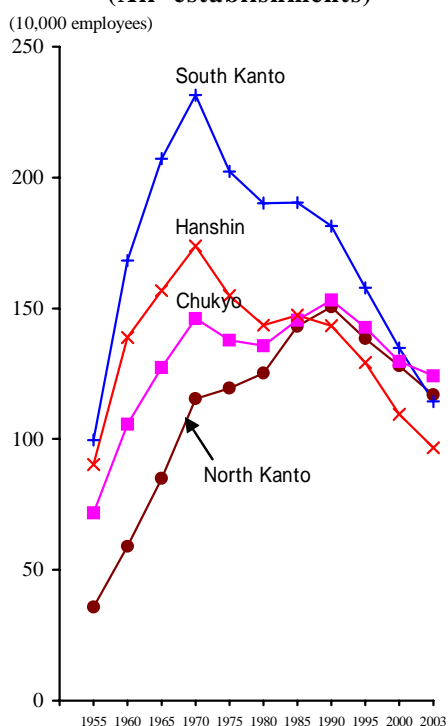


## (2) Number of employees

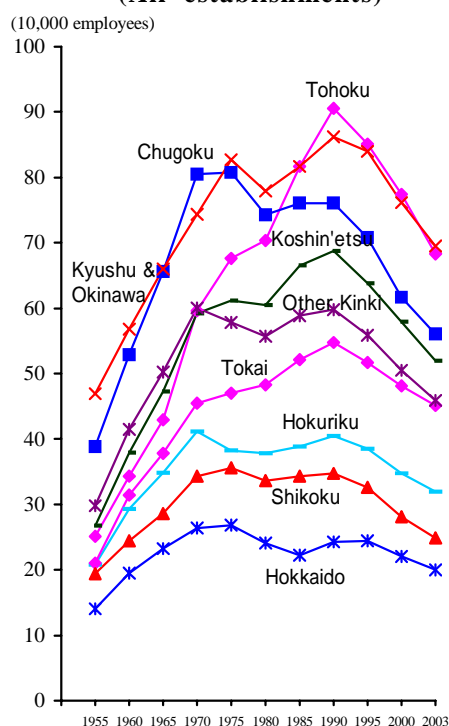
By region, the number of employees decreased in all regions except “Okinawa” in 2003, compared to 2000.

On a long-term basise, the number of employees has been decreasing in “South Kanto”, “Hanshin” and “Chugoku” after peaking in 1970, and has been decreasing in “Tohoku”, “Hokuriku”, “Kyushu and Okinawa”, “Koshin’etsu”, and “Tokai” after peaking in 1990. The composition ratio has been decreasing in “South Kanto” and “Hanshin”, and has been expanding in “Tohoku”, “North Kanto”, “Tokai”, “Chukyo”, and “Kyushu and Okinawa”.

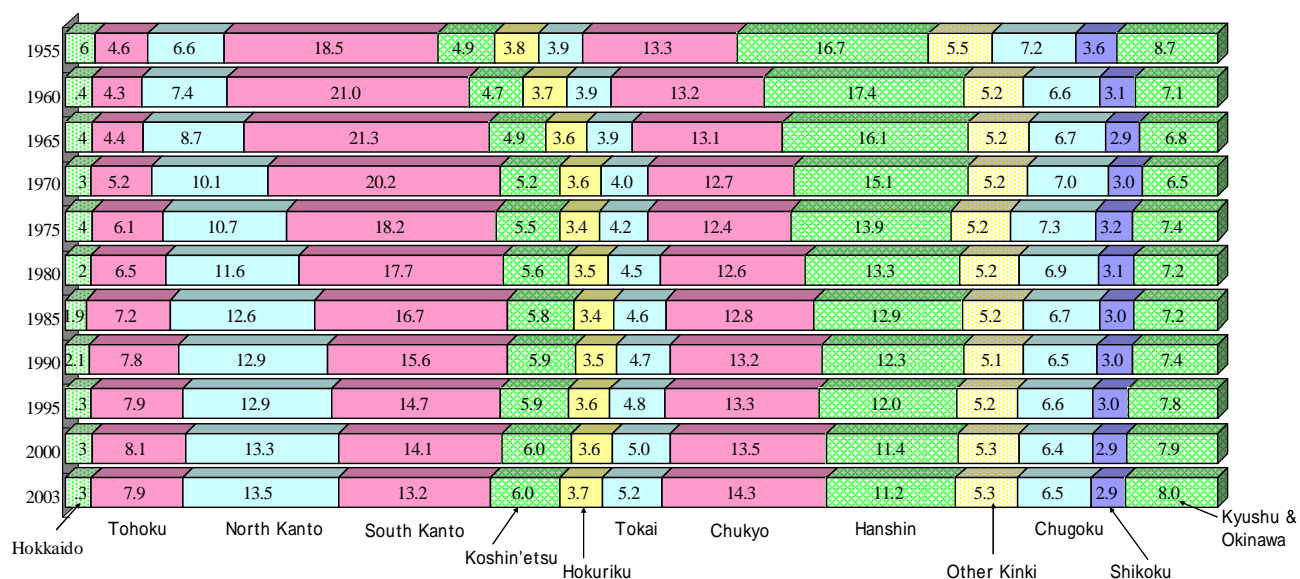
**Number of Establishments by Industry 1  
(All establishments)**



**Number of Establishments by Industry 2  
(All establishments)**



**Change in Composition Ratio of Number of Employees by Region (%)  
(All establishments)**

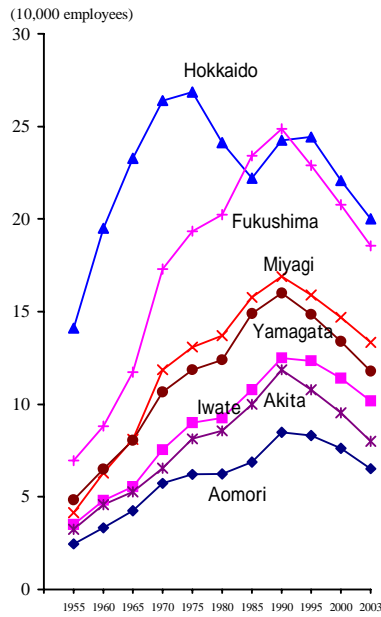


Hokkaido/ Tohoku (Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima)/ North Kanto (Ibaraki, Tochigi, Gunma, Saitama)/ South Kanto (Chiba, Tokyo, Kanagawa)/ Koshin’etsu (Yamanashi, Nagano, Niigata)/ Hokuriku (Toyama, Ishikawa, Fukui)/ Tokai (Shizuoka)/ Chukyo (Gifu, Aichi, Mie)/ Hanshin (Osaka, Hyogo)/ Other Kinki (Shiga, Kyoto, Nara, Wakayama)/ Chugoku (Tottori, Shimane, Okayama, Hiroshima, Yamaguchi)/ Shikoku (Tokushima, Kagawa, Ehime, Kochi)/ Kyushu & Okinawa (Fukuoka, Saga, Nagasaki, Kumamoto, Oita, Miyazaki, Kagoshima, Okinawa)

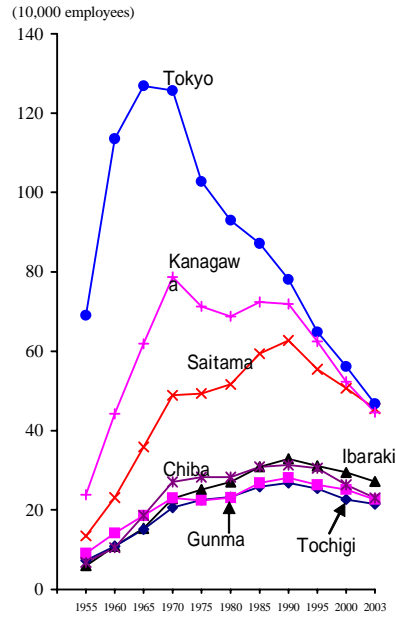


## Change in Number of Employees by Prefecture (All establishments)

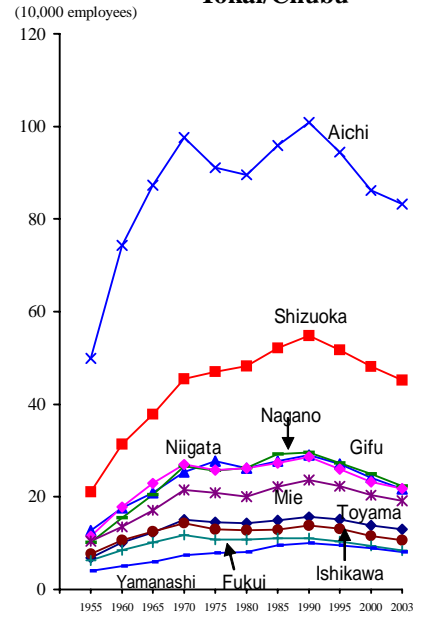
### Hokkaido/Tohoku



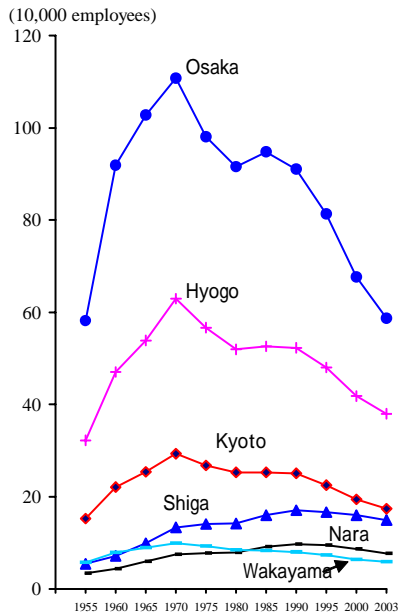
### Kanto



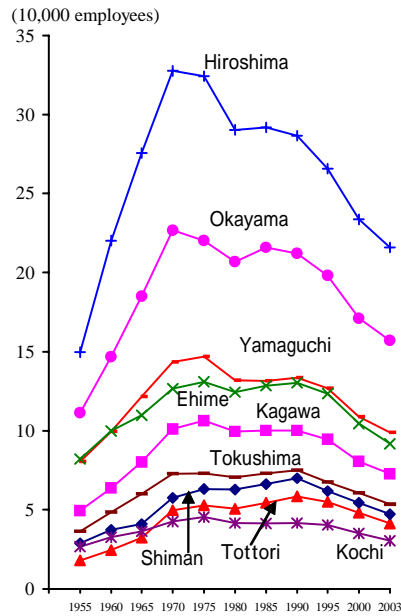
### Koshin'etsu/Hokuriku/ Tokai/Chubu



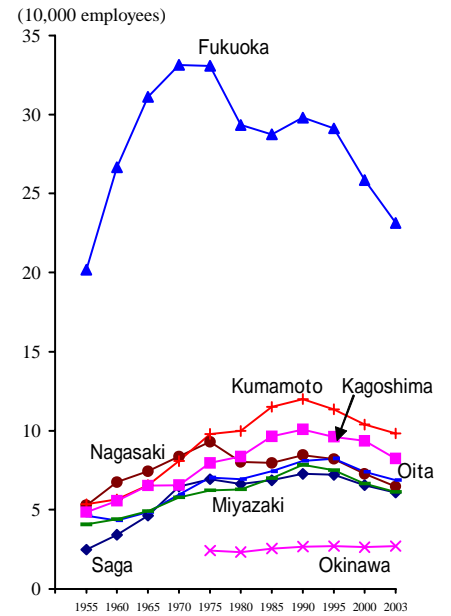
### Kinki



### Chugoku/Shikoku



### Kyushu/Okinawa

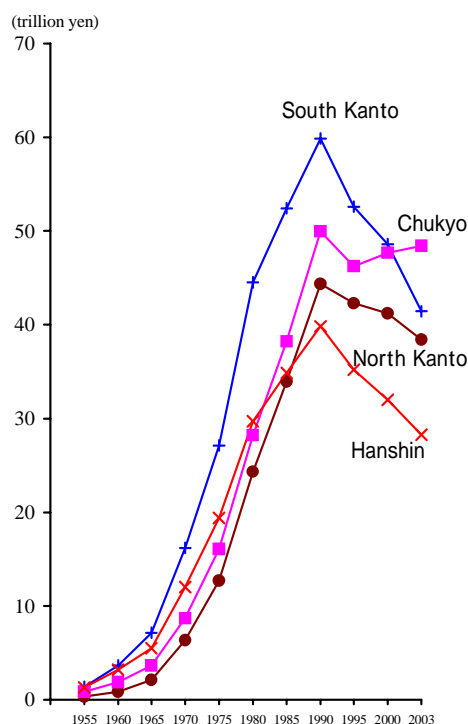


### (3) Shipment value

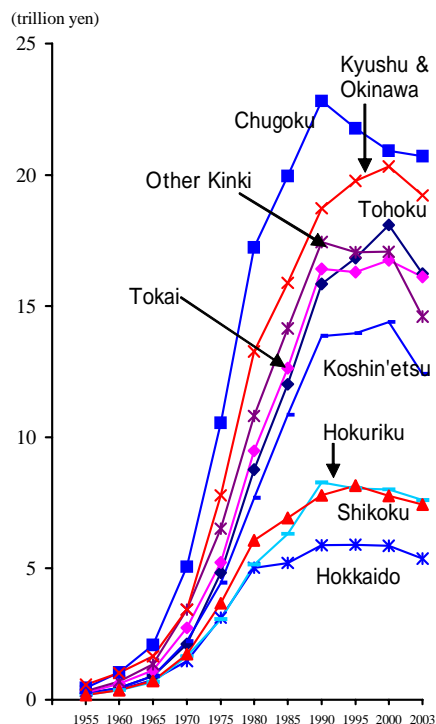
By region, shipment value has decreased in almost all regions after peaking in 1990, but increased only in “Chukyo” in 2003 compared to 2000.

The composition ratio has been decreasing in “South Kanto” and “Hanshin”, but has been expanding in “Chukyo”, “North Kanto”, “Tohoku”, and “Kyushu and Okinawa”, due to increases for transportation equipment (automobiles and parts) and electrical machinery, equipment, and supplies (personal computers, cellular telephones, liquid crystal TVs, semiconductor ICs, electronic parts, etc.).

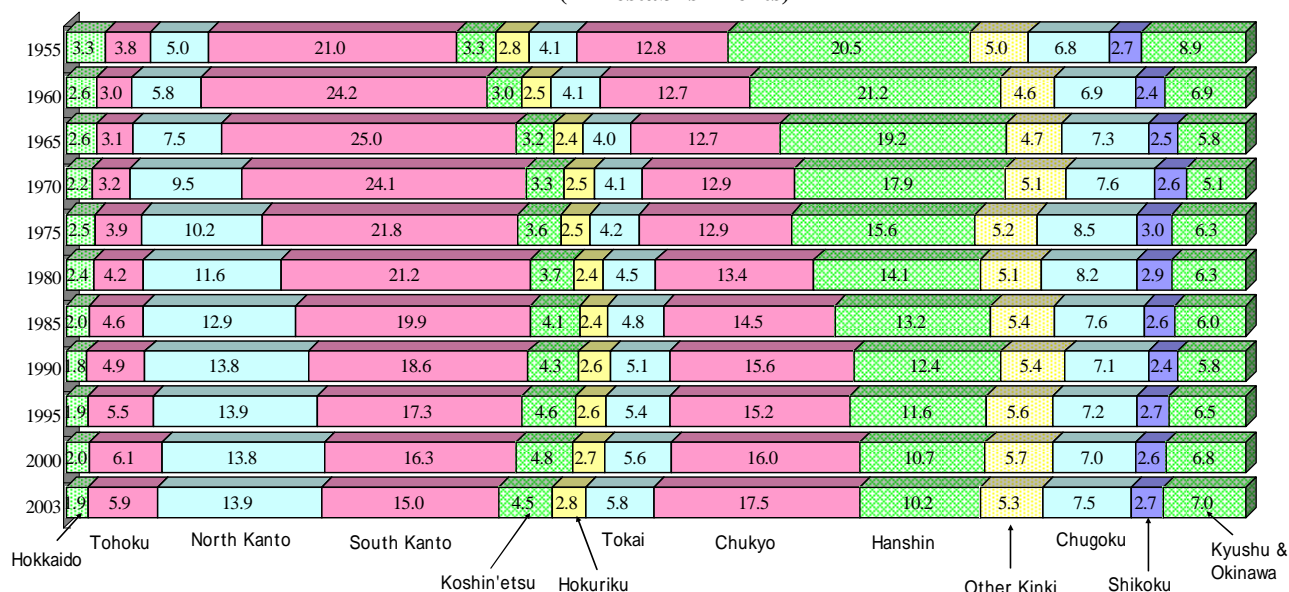
**Change in Shipment Value by Region 1**  
(All establishments)



**Change in Shipment Value by Region 2**  
(All establishments)



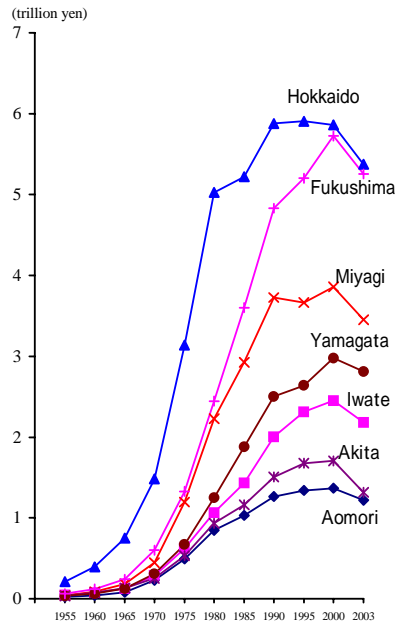
**Change in Composition Ratio of Number of Establishments by Region (%)**  
(All establishments)



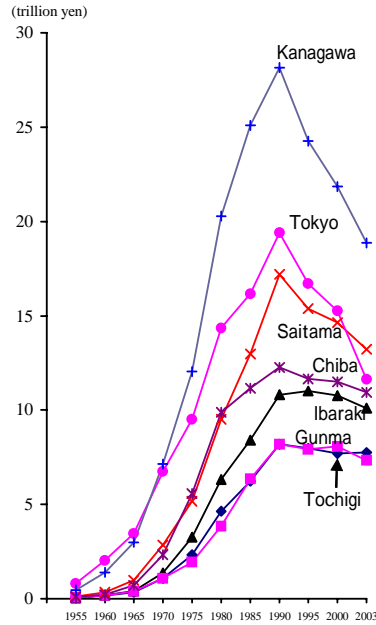
Hokkaido/ Tohoku (Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima)/ North Kanto (Ibaraki, Tochigi, Gunma, Saitama)/ South Kanto (Chiba, Tokyo, Kanagawa)/ Koshin'etsu (Yamanashi, Nagano, Niigata)/ Hokuriku (Toyama, Ishikawa, Fukui)/ Tokai (Shizuoka)/ Chukyo (Gifu, Aichi, Mie)/ Hanshin (Osaka, Hyogo)/ Other Kinki (Shiga, Kyoto, Nara, Wakayama)/ Chugoku (Tottori, Shimane, Okayama, Hiroshima, Yamaguchi)/ Shikoku (Tokushima, Kagawa, Ehime, Kochi)/ Kyushu & Okinawa (Fukuoka, Saga, Nagasaki, Kumamoto, Oita, Miyazaki), Kagoshima, Okinawa)

# Change in Shipment Value by Prefecture (All establishments)

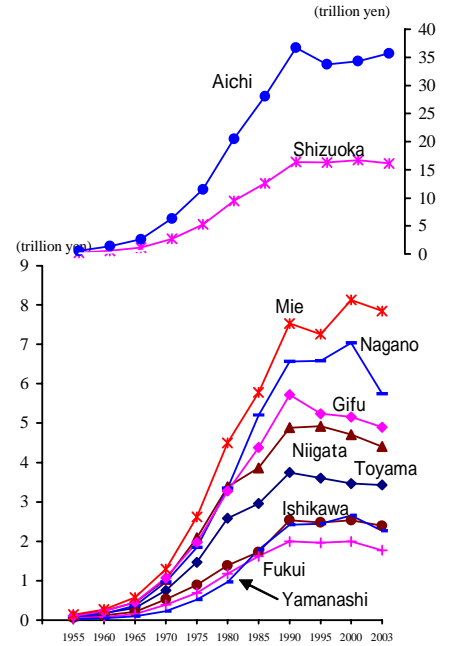
## Hokkaido/Tohoku



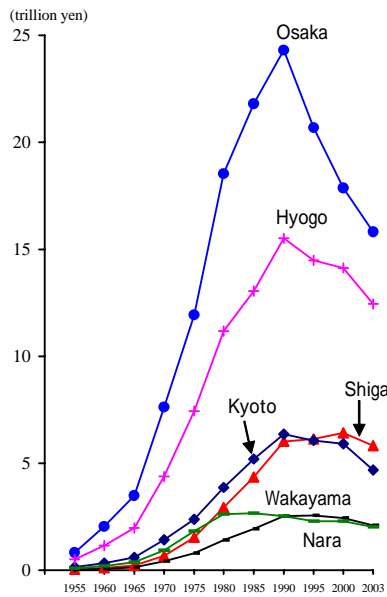
## Kanto



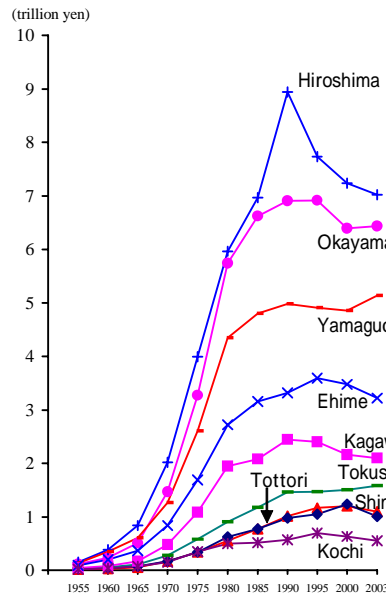
## Koshin'etsu/Hokuriku/ Tokai/Chubu



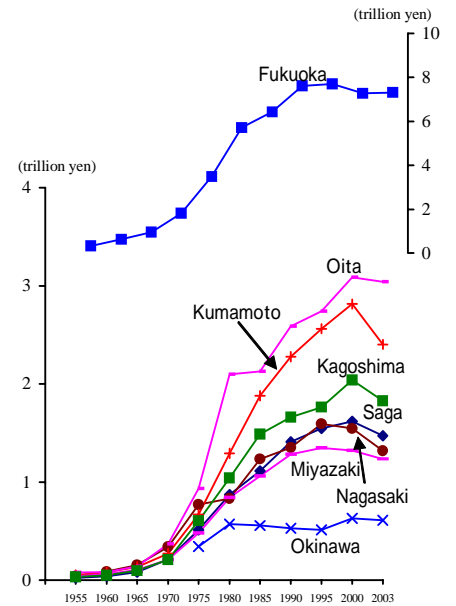
## Kinki



## Chugoku/Shikoku



## Kyushu/Okinawa



#### (4) Latest shipment value trends (based on 2003 data)

Based on data by prefecture for 2003, shipment value was highest in “Aichi”, half of which was for “Transportation equipment” such as automobiles.

Looking at the top industry in each prefecture, “Transportation equipment” was top-ranked in 12 prefectures, “Food”, “Electronic parts and devices”, and “General machinery” in 7 prefectures, “Chemical and allied products” in 4 prefectures, and “Petroleum and coal products” and “Information and communication electronics equipment” in 3 prefectures.

Note: New Japan Standard Industrial Classification revised in 2002 is used here.

#### Ranking of Shipment Value by Prefecture and Outline of Major Industries (2003, All establishments)

Prefecture	Real value (100 million yen)	Ranking		Composition ratio ( % )	Y/Y ( % )	First		Second		Third	
		2000	2003			Industry	Composition ratio	Industry	Composition ratio	Industry	Composition ratio
Total	2,762,302	-	-	100.0	-7.5	Transportation	18.1	General	9.6	Chemicals	8.5
Hokkaido	53,737	19	18	1.9	-8.3	Food	33.2	Petroleum	8.8	Paper	7.9
Aomori	12,216	42	43	0.4	-10.8	Food	23.7	Electronics	9.9	Paper	9.1
Iwate	21,781	32	32	0.8	-11.1	Food	14.3	Electronics	12.9	Transportation	11.7
Miyagi	34,508	24	24	1.2	-10.5	Food	18.0	Electronics	11.9	Electric	9.7
Akita	13,138	38	41	0.5	-23.1	Electronics	35.9	Food	7.8	General	6.1
Yamagata	28,107	28	28	1.0	-5.6	Information	22.2	Electronics	17.9	Food	9.4
Fukushima	52,525	20	19	1.9	-8.2	Information	15.4	Electronics	12.4	Chemicals	10.8
Ibaraki	101,133	9	9	3.7	-6.1	General	17.1	Chemicals	11.9	Food	10.8
Tochigi	77,498	12	11	2.8	0.6	Transportation	17.9	Information	10.0	Electric	7.9
Gunma	73,454	11	12	2.7	-9.1	Transportation	29.8	General	10.6	Electronics	9.2
Saitama	132,220	6	5	4.8	-9.7	Transportation	16.6	Chemicals	10.5	Food	9.9
Chiba	109,352	8	8	4.0	-5.0	Chemicals	18.7	Petroleum	17.0	Iron & steel	10.7
Tokyo	116,259	5	7	4.2	-23.8	Printing	16.2	Transportation	11.6	Information	11.5
Kanagawa	188,586	2	2	6.8	-13.7	Transportation	25.3	General	12.9	Chemicals	11.6
Niigata	44,077	23	23	1.6	-6.5	Electronics	13.4	Food	13.3	General	11.7
Toyama	34,276	26	25	1.2	-1.1	Metals	14.9	Chemicals	14.1	Electronics	14.1
Ishikawa	23,955	31	30	0.9	-5.6	General	21.4	Electronics	11.5	Information	10.7
Fukui	17,765	37	37	0.6	-11.3	Electronics	14.9	Chemicals	11.9	Fiber	10.9
Yamanashi	22,651	30	31	0.8	-14.6	General	19.7	Electronics	16.3	Electric	12.1
Nagano	57,452	15	17	2.1	-18.3	Electronics	16.7	Information	15.0	General	13.2
Gifu	49,030	21	21	1.8	-4.9	General	12.4	Transportation	12.4	Electric	12.0
Shizuoka	161,013	4	3	5.8	-3.8	Transportation	29.4	Electric	9.7	Chemicals	8.8
Aichi	357,000	1	1	12.9	3.9	Transportation	49.9	General	8.5	Electric	5.9
Mie	78,431	10	10	2.8	-3.6	Transportation	27.2	Electronics	11.1	Chemicals	10.4
Shiga	58,134	16	16	2.1	-9.5	General	13.5	Electric	12.3	Transportation	12.3
Kyoto	46,834	18	22	1.7	-20.9	Beverage	12.1	Transportation	9.8	Electric	8.8
Osaka	158,222	3	4	5.7	-11.4	Chemicals	13.9	General	12.6	Metals	9.5
Hyogo	124,357	7	6	4.5	-12.0	General	14.7	Food	10.1	Chemicals	9.7
Nara	20,784	33	34	0.8	-15.1	General	20.4	Electronics	15.7	Food	10.0
Wakayama	20,202	34	35	0.7	-11.6	Petroleum	21.6	Chemicals	17.2	Iron & steel	14.3
Tottori	10,935	45	44	0.4	-9.1	Electronics	29.9	Information	11.8	Food	10.9
Shimane	10,059	44	45	0.4	-18.3	Information	23.9	Iron & steel	11.3	General	10.7
Okayama	64,395	17	15	2.3	0.8	Transportation	17.0	Chemicals	13.7	Petroleum	13.2
Hiroshima	70,224	14	14	2.5	-3.0	Transportation	24.3	Iron & steel	13.0	General	12.1
Yamaguchi	51,415	22	20	1.9	5.9	Chemicals	27.8	Transportation	18.2	Petroleum	15.0
Tokushima	15,784	41	38	0.6	4.8	Chemicals	23.9	Electronics	10.9	Electric	9.7
Kagawa	20,967	35	33	0.8	-2.8	Petroleum	14.8	Food	13.8	Transportation	8.8
Ehime	32,214	25	26	1.2	-7.2	Paper	16.1	Chemicals	11.4	Food	8.9
Kochi	5,500	46	47	0.2	-12.9	Electronics	21.9	Food	11.6	Ceramics	11.2
Fukuoka	73,065	13	13	2.6	0.5	Transportation	27.5	Food	10.7	Iron & steel	8.1
Saga	14,741	39	39	0.5	-8.9	Food	18.4	General	10.5	Electric	10.1
Nagasaki	13,179	40	40	0.5	-14.7	Transportation	24.6	General	19.6	Food	16.6
Kumamoto	23,996	29	29	0.9	-14.7	Transportation	19.6	Electronics	17.1	Food	11.5
Oita	30,407	27	27	1.1	-1.5	Electronics	14.2	Electric	12.0	Iron & steel	11.3
Miyazaki	12,363	43	42	0.4	-6.6	Food	18.7	Electronics	15.0	Beverages	13.1
Kagoshima	18,255	36	36	0.7	-10.4	Food	28.8	Beverages	20.9	Electronics	20.8
Okinawa	6,106	47	46	0.2	-3.2	Petroleum	29.2	Food	22.4	Beverages	15.3

Note: Because of the revision of the Japan Standard Industrial Classification in 2002, the year-on-year comparisons for 2003 are calculated by incorporating the classification of 2000.