

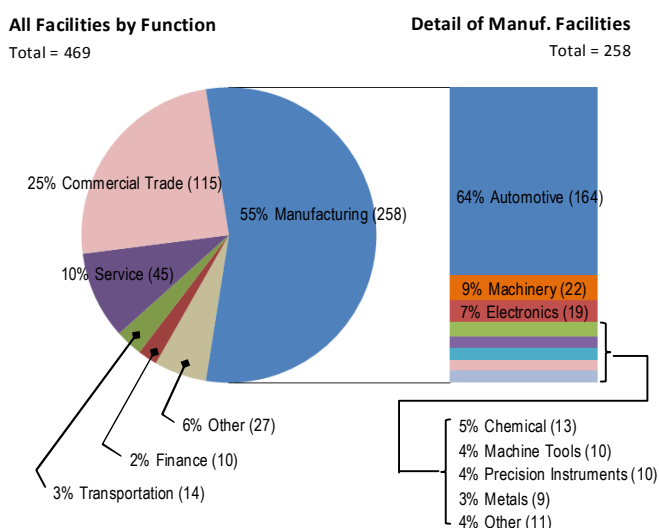
2013 Japanese Direct Investment Survey: Summary of Michigan Results (as of October 1, 2013)

The Consulate General of Japan in Detroit annually surveys Japanese-owned facilities and Japanese nationals in Michigan. As the 2013 data indicate, Japanese investment contributes significantly to the state economy.

FACILITIES

Japan is a leading foreign investor in Michigan with 469 facilities. The majority of Japanese facilities (258) operate in the manufacturing sector; 64% of manufacturing facilities are automotive related. There are 115 facilities operating in the commercial trade sector, accounting for 25%, or the majority of all non-manufacturing facilities.

Figure 1: Japanese Facilities by Sector



EMPLOYMENT

Japanese facilities provide 37,020 jobs in Michigan, 95% of which are held by local residents.

Figure 2: Long-term Japanese Investment Trends

| Year | Facilities | Total Employees | Employee Breakdown | | Manufacturing Employees |
|----------------|------------|-----------------|--------------------|--------------|-------------------------|
| | | | Local | Japanese | |
| 2013 | 469 | 37,020 | 35,197 | 1,823 | 15,704 |
| 2012 | 481 | 35,788 | 34,061 | 1,727 | 15,376 |
| 2008 | 548 | 37,522 | 35,311 | 2,211 | 15,896 |
| 2003 | 483 | 36,419 | 34,261 | 2,158 | 16,434 |
| Percent Change | | | | | |
| 1 Year | -2.5% | 3.4% | 3.3% | 5.6% | 2.1% |
| 5 Year | -14.4% | -1.3% | -0.3% | -17.5% | -1.2% |
| 10 Year | -2.9% | 1.7% | 2.7% | -15.5% | -4.4% |

NOTE: Japanese facilities are defined as non-franchised operations with at least a 10% share of Japanese ownership. Past years' data are periodically revised.

GEOGRAPHIC DISTRIBUTION

The southeast's 380 facilities are primarily R&D, engineering and sales offices, which provide 21,853 jobs. The facilities in other regions are predominately in the manufacturing sector, and provide 15,167 jobs.

Figure 3: Japanese Investment by Region (Top Counties)

| Region | Facilities | Total | Manufacturing |
|---------------------|------------|---------------|---------------|
| | | Employees | Employees |
| Southeast | 380 | 21,853 | 4,839 |
| • Oakland County | 229 | 10,880 | 1,075 |
| • Wayne County | 100 | 5,948 | 2,224 |
| • Washtenaw County | 25 | 3,123 | 389 |
| • Macomb County | 13 | 596 | 339 |
| • Livingston County | 10 | 935 | 561 |
| Southwest | 48 | 11,031 | 7,941 |
| Central | 33 | 3,529 | 2,461 |
| Northern | 8 | 607 | 463 |

JAPANESE POPULATION

As of January 2014, there are 12,027 Japanese nationals in Michigan, most of whom reside in the southeastern region of the state.

Figure 4: Japanese Population (Top 5 Cities)

- ① Novi 2,941
- ② Ann Arbor 1,584
- ③ West Bloomfield 974
- ④ Farmington Hills 643
- ⑤ Battle Creek 343

