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Japanese Manufacturing Affiliates in Europe and Turkey

- 2004 Survey -

September 2005

**Japan External Trade Organization
(JETRO)**

Preface

The survey on “Japanese manufacturing affiliates in Europe and Turkey” has been conducted 21 times since the first survey in 1983*. The latest survey, carried out from January 2005 to February 2005 targeting 17 countries in Western Europe, 7 countries in Central and Eastern Europe, and Turkey, focused on business trends and future prospects in each country, procurement of materials, production, sales, and management problems, impact of EU enlargement, etc.

The survey revealed that as of the end of 2004 there were a total of 989 Japanese manufacturing affiliates operating in the surveyed region --- 814 in Western Europe, 160 in Central and Eastern Europe, and 15 in Turkey. Of this total, 259 affiliates --- 252 in Western Europe, 6 in Central and Eastern Europe, and 1 in Turkey ---also operate R & D or design centers. Also, the number of Japanese affiliates who operate only R & D or design centers in the surveyed region (no manufacturing operations) totaled 116 affiliates --- 111 in Western Europe and 5 in Central and Eastern Europe.

The business environment in Europe including Central and Eastern European countries has changed dramatically since the EU Enlargement of May 1, 2004. In this survey we put emphasis on the impact of EU enlargement on Japanese manufacturing affiliates.

We would like to express our great appreciation to the affiliates concerned for their kind cooperation, which have enabled us over the years to constantly improve the survey and report on the results. We hope that the affiliates and those who are interested in business development in Europe and/or Turkey will find this report useful.

August 2005

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Japan External Trade Organization (JETRO)**

*** Countries in Central and Eastern Europe and Turkey were included in the survey from 1998 and 1999 respectively.**

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Overview of the Survey

This is the 21st of a series of surveys conducted annually since 1983 by JETRO centers and offices based in Europe and Turkey.

1. Purpose of the Survey

The survey analyzes the activities of Japanese manufacturing affiliates in Europe and Turkey. The results are published in the form of a reference work to help facilitate local business activities (drawing up a future management strategy, for instance) or the entry of Japanese manufacturing enterprises in Europe and Turkey.

2. Targets of the Survey

The survey targeted manufacturing companies in 17 countries in Western Europe (15 members of the EU, Norway and Switzerland), 7 countries in Central and Eastern Europe, and Turkey. These companies derive 10% or more of their financing from Japanese companies, both directly and indirectly. Survey recipients also include companies (subsidiaries) set up by Japanese affiliates already operating in Europe or other regions, and companies that have completed local corporate registration but not yet started operations.

3. Methods of the Survey

We sent by e-mail to the respondents an Internet link (URL) to the online questionnaire form and asked them to reply directly on line. We also sent questionnaire sheets by mail or facsimile for some respondents and included their answers in the tabulated results.

With this survey on the number of companies operating overseas by country and industry, we endeavored to learn as far as possible the exact number of Japanese affiliates that had entered into or withdrawn from the surveyed regions since the previous (20th) survey. In the process, we added or deleted Japanese affiliates that had been established or withdrawn before 2003 but that we had been unable to access at the time of the previous survey.

4. Period of the Survey

January through February 2005

5. Response status

Of 989 Japanese manufacturing enterprises whose entry into Europe or Turkey had been identified, we sent the Internet link (URL) to the questionnaire form by e-mail to the 630 enterprises that agreed to cooperate in the survey (some questionnaire forms were also sent by mail or facsimile), and received valid responses from 339 companies (response rate of 53.8%).

6. Notes on the survey results

Not all the respondents answered all the questions. The percentage figures in this report are calculated using the number of respondents who actually answered a specific question, and rounded to two decimal places. The percentages do not necessarily add up to 100.0%.

Overseas Production Bases of Japanese Manufacturing Affiliates

As of the end of 2004

Europe and Turkey (989)
 Western Europe (814),
 Central and Eastern Europe (160),
 and Turkey (15)

Figure: Japanese manufacturing affiliates
 Basis: 10% or more of financing
 from Japanese companies

Source: Survey by JETRO offices in Europe and Turkey

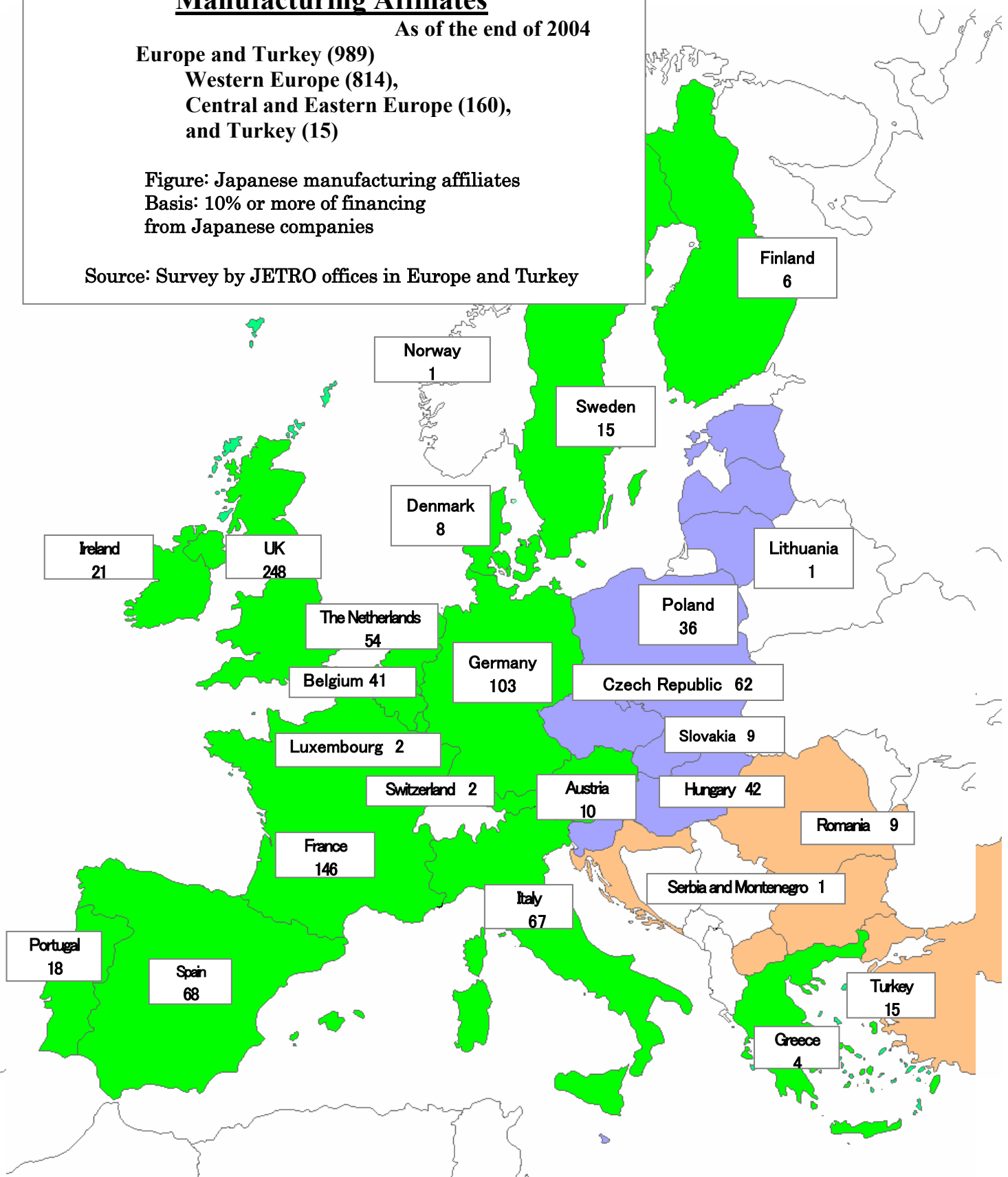


Table 1: Year of establishment of Japanese Manufacturing Affiliates in Europe and Turkey (by Country)

| | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end |
| UK | 37 | 49 | 62 | 79 | 103 | 121 | 129 | 140 | 149 | 156 | 165 | 180 | 189 | 202 | 216 | 232 | 236 | 239 | 245 | 248 |
| France | 36 | 43 | 50 | 58 | 69 | 77 | 83 | 86 | 90 | 99 | 108 | 120 | 123 | 131 | 134 | 141 | 143 | 145 | 145 | 146 |
| Germany | 26 | 28 | 32 | 35 | 49 | 59 | 64 | 70 | 72 | 74 | 80 | 84 | 85 | 87 | 90 | 90 | 95 | 96 | 100 | 103 |
| Netherlands | 16 | 17 | 17 | 20 | 25 | 25 | 31 | 34 | 35 | 37 | 39 | 43 | 46 | 49 | 53 | 53 | 54 | 54 | 54 | 54 |
| Belgium | 16 | 17 | 18 | 20 | 25 | 30 | 32 | 34 | 35 | 35 | 37 | 37 | 39 | 39 | 41 | 41 | 41 | 41 | 41 | 41 |
| Luxembourg | | | | | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Ireland | 4 | 5 | 5 | 6 | 9 | 11 | 13 | 14 | 15 | 15 | 18 | 18 | 19 | 20 | 20 | 20 | 20 | 21 | 21 | 21 |
| Spain | 21 | 25 | 28 | 31 | 35 | 39 | 44 | 45 | 47 | 50 | 51 | 53 | 55 | 58 | 60 | 62 | 63 | 65 | 66 | 68 |
| Italy | 20 | 21 | 22 | 26 | 30 | 38 | 40 | 40 | 42 | 45 | 49 | 52 | 54 | 57 | 59 | 60 | 63 | 64 | 65 | 67 |
| Finland | | | | | | | | 1 | 1 | 2 | 2 | 3 | 4 | 4 | 4 | 4 | 5 | 6 | 6 | 6 |
| Norway | | | | | | | | | | | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Sweden | 3 | 4 | 5 | 5 | 6 | 6 | 7 | 8 | 10 | 10 | 10 | 11 | 11 | 11 | 12 | 13 | 14 | 14 | 15 | 15 |
| Denmark | 1 | 1 | 1 | 1 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 4 | 4 | 4 | 4 | 6 | 6 | 6 | 8 |
| Austria | 3 | 5 | 5 | 5 | 5 | 5 | 5 | 8 | 8 | 8 | 8 | 8 | 9 | 9 | 9 | 10 | 10 | 10 | 10 | 10 |
| Portugal | 4 | 5 | 5 | 6 | 7 | 9 | 9 | 11 | 12 | 12 | 14 | 15 | 15 | 17 | 17 | 17 | 17 | 18 | 18 | 18 |
| Switzerland | | | | | | | | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 |
| Greece | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 4 | 4 | 4 |
| Western Europe | 190 | 223 | 253 | 295 | 369 | 427 | 465 | 500 | 525 | 552 | 590 | 633 | 660 | 695 | 727 | 755 | 775 | 788 | 803 | 814 |
| Poland | | | | | | | | | 1 | 1 | 4 | 5 | 8 | 11 | 15 | 15 | 19 | 24 | 31 | 36 |
| Czech Republic | | | | | | | 1 | 5 | 7 | 7 | 8 | 10 | 13 | 13 | 15 | 19 | 31 | 46 | 53 | 62 |
| Slovakia | | | | | | | | | | 1 | 1 | 3 | 4 | 4 | 4 | 6 | 8 | 8 | 8 | 9 |
| Hungary | | | | | | | 2 | 2 | 3 | 6 | 8 | 9 | 13 | 16 | 20 | 28 | 31 | 35 | 38 | 42 |
| Romania | | | | | | | | | | | | | | 1 | 1 | 3 | 5 | 7 | 9 | 9 |
| Lithuania | | | | | | | | | | | | | | | | | 1 | 1 | 1 | 1 |
| Serbia and Montenegro | | | | | | | | | | | | | | | | | | 1 | 1 | 1 |
| Central & Eastern Europe | | | | | | | 3 | 7 | 11 | 15 | 21 | 27 | 38 | 45 | 55 | 71 | 95 | 122 | 141 | 160 |
| Turkey | 1 | 1 | 2 | 3 | 3 | 4 | 5 | 6 | 6 | 6 | 7 | 7 | 8 | 8 | 8 | 8 | 9 | 13 | 14 | 15 |
| Total | 191 | 224 | 255 | 298 | 372 | 431 | 473 | 513 | 542 | 573 | 618 | 667 | 706 | 748 | 790 | 834 | 879 | 923 | 958 | 989 |
| Number of Companies Established within the Year | 20 | 33 | 31 | 43 | 74 | 59 | 42 | 40 | 29 | 31 | 45 | 49 | 39 | 42 | 42 | 44 | 45 | 44 | 35 | 31 |
| Increase over the previous year (%) | 11.7 | 17.3 | 13.8 | 16.9 | 24.8 | 15.9 | 9.7 | 8.5 | 5.7 | 5.7 | 7.9 | 7.9 | 5.9 | 6.0 | 5.6 | 5.6 | 5.4 | 5.0 | 3.8 | 3.2 |

[Note] The table indicates the number of Japanese manufacturing affiliates operating in the regions as of the end of 2004 (989 companies) by year of establishment; the figures for each year (2003 and before) are the number of companies operating as of the end of each year.

The figures only indicate manufacturing bases and not independent R & D or design centers.

Table 2: Number of Japanese Manufacturing Affiliates in Europe and Turkey by Country and Industry (as of the end of 2004)

| | Total | Western Europe Total | UK | France | Germany | Netherlands | Belgium | Luxembourg | Ireland | Spain | Italy | Finland | Norway | Sweden | Denmark | Austria | Portugal | Switzerland | Greece | Central & Eastern Europe Total | Poland | Czech Republic | Slovakia | Hungary | Romania | Lithuania | Serbia and Montenegro | Turkey |
|--|-------|----------------------|-----|--------|---------|-------------|---------|------------|---------|-------|-------|---------|--------|--------|---------|---------|----------|-------------|--------|--------------------------------|--------|----------------|----------|---------|---------|-----------|-----------------------|--------|
| Food products, agricultural and fisheries product processing | 50 | 45 | 10 | 20 | 3 | 4 | 1 | 0 | 0 | 3 | 1 | 0 | 0 | 0 | 2 | 0 | 0 | 1 | 0 | 4 | 1 | 0 | 0 | 2 | 1 | 0 | 0 | 1 |
| Textiles (yarn/woven material) | 9 | 8 | 1 | 0 | 1 | 1 | 0 | 0 | 0 | 1 | 3 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Clothing/textile products | 16 | 16 | 7 | 6 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Timber/wood products | 5 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| (excluding furniture/interior products) | 1 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Furniture/interior products | 8 | 8 | 1 | 0 | 5 | 1 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Paper/pulp | 1 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Printing/publishing | 128 | 125 | 32 | 24 | 12 | 12 | 1 | 1 | 10 | 10 | 10 | 0 | 1 | 1 | 1 | 2 | 4 | 1 | 1 | 3 | 0 | 1 | 0 | 2 | 0 | 0 | 0 | 0 |
| Chemical/petrochemical products | 18 | 16 | 5 | 1 | 0 | 4 | 2 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | 0 | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| Plastic products | 34 | 34 | 4 | 7 | 5 | 1 | 4 | 0 | 6 | 2 | 4 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Pharmaceutical products | 24 | 17 | 3 | 5 | 1 | 1 | 1 | 0 | 2 | 2 | 1 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 6 | 5 | 0 | 0 | 1 | 0 | 0 | 0 | 1 |
| Rubber products | 19 | 15 | 5 | 1 | 2 | 0 | 4 | 0 | 0 | 2 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| Ceramics, soil and stone | 5 | 4 | 0 | 0 | 1 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Iron and steel | 12 | 9 | 2 | 2 | 2 | 1 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 1 | 0 | 0 | 2 | 0 | 0 | 0 | 0 |
| Nonferrous metal | 32 | 27 | 12 | 2 | 0 | 2 | 0 | 0 | 1 | 5 | 1 | 0 | 0 | 0 | 0 | 0 | 3 | 0 | 1 | 5 | 0 | 2 | 0 | 1 | 1 | 1 | 0 | 0 |
| Metal products | 101 | 90 | 26 | 7 | 27 | 5 | 3 | 0 | 2 | 2 | 12 | 0 | 0 | 4 | 0 | 2 | 0 | 0 | 0 | 11 | 7 | 3 | 0 | 1 | 0 | 0 | 0 | 0 |
| General machinery | 64 | 55 | 27 | 10 | 5 | 1 | 1 | 0 | 2 | 5 | 2 | 0 | 0 | 1 | 0 | 0 | 1 | 0 | 0 | 9 | 0 | 3 | 2 | 4 | 0 | 0 | 0 | 0 |
| Electric machinery | 107 | 82 | 21 | 13 | 14 | 6 | 4 | 1 | 6 | 4 | 6 | 1 | 0 | 3 | 2 | 0 | 1 | 0 | 0 | 25 | 3 | 7 | 4 | 10 | 1 | 0 | 0 | 0 |
| Electric and electronic parts | 26 | 21 | 5 | 3 | 1 | 2 | 0 | 0 | 0 | 6 | 1 | 0 | 0 | 1 | 0 | 0 | 2 | 0 | 2 | 0 | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 3 |
| Transportation machinery | 192 | 115 | 49 | 16 | 8 | 2 | 5 | 0 | 0 | 14 | 15 | 0 | 0 | 3 | 0 | 0 | 3 | 0 | 0 | 68 | 14 | 33 | 3 | 13 | 4 | 0 | 1 | 9 |
| Transportation machinery parts | 51 | 48 | 17 | 15 | 9 | 4 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 1 | 0 | 1 | 0 | 0 | 0 | 3 | 0 | 1 | 0 | 2 | 0 | 0 | 0 | 0 |
| Precision machinery | 86 | 72 | 21 | 13 | 7 | 5 | 4 | 0 | 1 | 7 | 7 | 0 | 0 | 0 | 3 | 2 | 1 | 0 | 1 | 13 | 3 | 5 | 0 | 3 | 2 | 0 | 0 | 1 |
| Other manufacturing | 989 | 814 | 248 | 146 | 103 | 54 | 41 | 2 | 21 | 68 | 67 | 6 | 1 | 15 | 8 | 10 | 18 | 2 | 4 | 160 | 36 | 62 | 9 | 42 | 9 | 1 | 1 | 15 |
| Industry Total | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

[Note] Only indicates manufacturing bases and does not include independent R & D or design centers.

Table 3: Number of Japanese Manufacturing Affiliates in Europe and Turkey Having R & D and Design Centers

| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end | year end |
| UK | 78 (22) | 82 (23) | 84 (24) | 91 (28) | 98 (33) | 102 (36) | 108 (39) | 116 (47) | 118 (48) | 121 (49) | 124 (52) |
| France | 47 (6) | 51 (9) | 56 (10) | 58 (11) | 61 (12) | 62 (12) | 65 (12) | 65 (12) | 66 (12) | 66 (12) | 66 (12) |
| Germany | 36 (21) | 39 (23) | 40 (23) | 40 (23) | 40 (23) | 40 (23) | 41 (24) | 41 (24) | 41 (24) | 44 (25) | 45 (25) |
| Netherlands | 15 (3) | 15 (3) | 18 (3) | 20 (4) | 20 (4) | 20 (4) | 20 (4) | 21 (4) | 21 (4) | 21 (4) | 21 (4) |
| Belgium | 20 (3) | 20 (3) | 20 (3) | 22 (3) | 22 (3) | 23 (4) | 23 (4) | 23 (4) | 23 (4) | 23 (4) | 23 (4) |
| Luxembourg | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Ireland | 2 (1) | 2 (1) | 2 (1) | 2 (1) | 2 (1) | 3 (2) | 3 (2) | 3 (2) | 3 (2) | 3 (2) | 3 (2) |
| Spain | 26 (4) | 27 (4) | 28 (5) | 29 (6) | 30 (6) | 31 (6) | 33 (6) | 33 (6) | 33 (6) | 33 (6) | 34 (6) |
| Italy | 17 (3) | 19 (3) | 20 (3) | 21 (3) | 21 (3) | 22 (3) | 22 (3) | 22 (3) | 22 (3) | 22 (3) | 22 (3) |
| Finland | 1 | 1 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 | 2 |
| Norway | | | | | | | | | | | |
| Sweden | 7 | 7 | 7 | 7 | 7 | 7 | 8 | 9 | 9 | 9 | 9 |
| Denmark | 1 (1) | 1 (1) | 1 (1) | 2 (1) | 2 (1) | 3 (2) | 3 (2) | 4 (2) | 5 (3) | 6 (3) | 6 (3) |
| Austria | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Portugal | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Switzerland | | | | | | | | | | | |
| Greece | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Western Europe | 257 (64) | 272 (70) | 286 (73) | 302 (80) | 313 (86) | 323 (92) | 336 (96) | 347 (104) | 351 (106) | 358 (108) | 363 (111) |
| Poland | | | | | 2 (1) | 2 (1) | 2 (1) | 2 (1) | 2 (1) | 2 (1) | 2 (1) |
| Czech Republic | | | 1 | 1 | 1 | 1 | 1 | 2 (1) | 2 (1) | 3 (1) | 3 (1) |
| Slovakia | | | | | | | | | | | |
| Hungary | 1 (1) | 1 (1) | 1 (1) | 1 (1) | 2 (1) | 3 (2) | 3 (2) | 3 (2) | 3 (2) | 3 (2) | 3 (2) |
| Romania | | | | | 1 | 1 | 1 | 1 | 3 (1) | 3 (1) | 3 (1) |
| Lithuania | | | | | | | | | | | |
| Serbia and Montenegro | | | | | | | | | | | |
| Central & Eastern Europe | 1 (1) | 1 (1) | 2 (1) | 2 (1) | 6 (2) | 7 (3) | 7 (3) | 8 (4) | 10 (5) | 11 (5) | 11 (5) |
| Turkey | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Total | 259 (65) | 274 (71) | 289 (74) | 305 (81) | 320 (88) | 331 (95) | 344 (99) | 356 (108) | 362 (111) | 370 (113) | 375 (116) |
| Increase over the previous year | 14 (2) | 15 (6) | 15 (3) | 16 (7) | 15 (7) | 11 (7) | 13 (4) | 12 (9) | 6 (3) | 8 (2) | 5 (3) |
| Increase over the previous year (%) | 5.7 (3.2) | 5.8 (9.2) | 5.5 (4.2) | 5.5 (9.5) | 4.9 (8.6) | 3.4 (8.0) | 3.9 (4.2) | 3.5 (9.1) | 1.7 (2.8) | 2.2 (1.8) | 1.4 (2.7) |

(Note) The table includes centers that are owned by manufacturers as well as those that exist as independent corporations or research laboratories.

The numbers in brackets indicate independent R & D and design centers.

Western Europe

I. Overview of Japanese Manufacturing Affiliates in Western Europe

--- The number of Japanese manufacturing affiliates has reached 814.

[Number of Japanese manufacturing affiliates in Western Europe]

- The number of Japanese manufacturing affiliates in Western Europe at the end of 2004 was 814, higher by 11 companies from the end of 2003.

[By country]

- The biggest presence is in the UK with 248 companies, followed by France (146 companies) and Germany (103 companies). These three countries account for 61.1% of all Japanese manufacturing affiliates in Western Europe.

[By industry]

- Chemical/petrochemical products (125 companies or 15.4% of the total), transportation machinery parts (115 companies or 14.1%), general machinery (90 companies or 11.1%), and electric and electronic parts (82 companies or 10.1%).

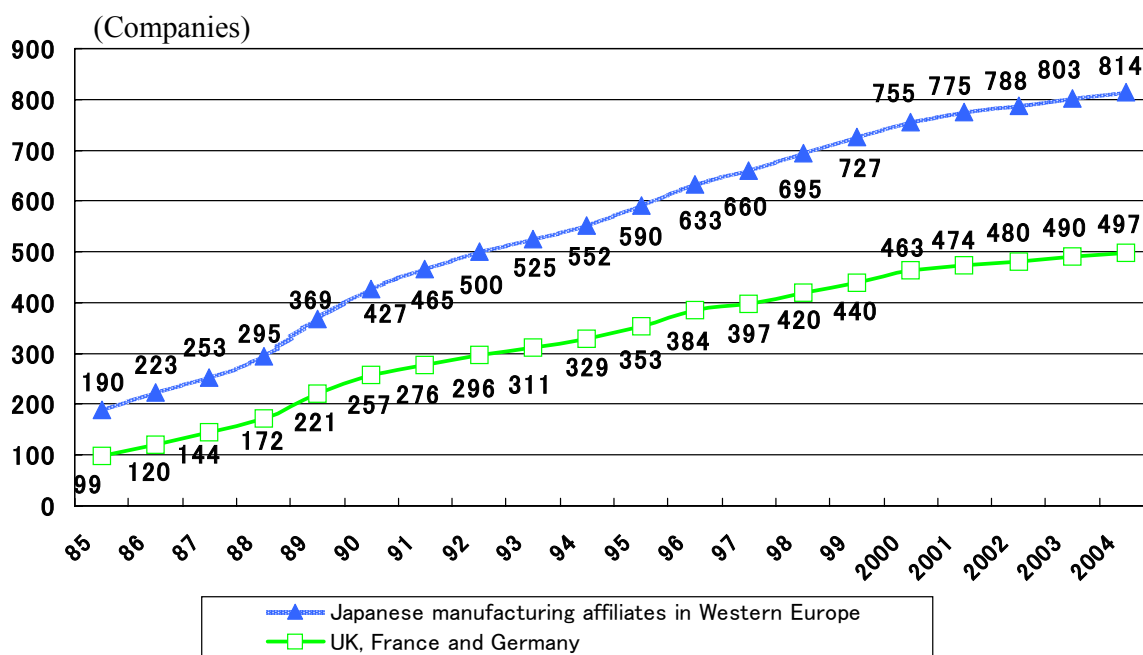
1. Advance of Japanese Manufacturing Affiliates into Western Europe Slowing

The latest survey (as of the end of 2004) showed there were 814 Japanese manufacturing affiliates in Western Europe [See Diagram 2-1]. This is an increase of 11 companies from the end of 2003.

By country, the UK had the most affiliates (248 companies), followed by France (146 companies), Germany (103 companies), Spain (68 companies), Italy (67 companies), the Netherlands (54 companies), and Belgium (41 companies). A total of 497 companies in the UK, France and Germany account for 61.1% of the total affiliates in Western Europe.

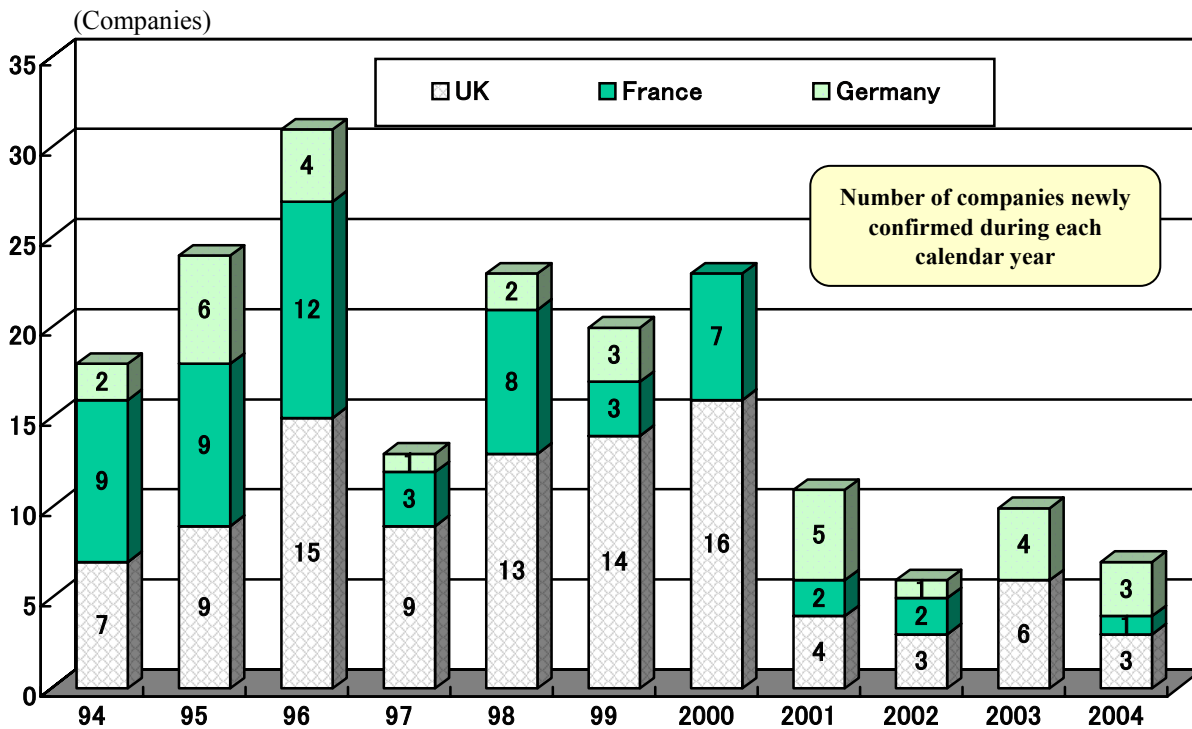
Diagram 2-1: Development of Japanese Manufacturing Affiliates in Western Europe

The number of affiliates as of the end of each calendar year



(Source: JETRO Survey, Japan External Trade Organization)

Diagram 2-2: Number of Japanese Manufacturing Affiliates Newly Entering Western Europe



(Source: JETRO Survey, Japan External Trade Organization)

2. Chemical/petrochemical products, transportation machinery parts, general machinery, and electric and electronic parts are the four main industries

By industry, most Japanese manufacturing affiliates are in chemical/petrochemical products (125 companies or 15.4% of the total), followed by transportation machinery parts (115 companies or 14.1%), general machinery (90 companies or 11.1%), and electric and electronic parts (82 companies or 10.1%). These four industries account for 50.7% of the total. [See Diagram 2-3]

In the UK, particularly large number of companies are in the transportation machinery parts industry, France in the chemical/petrochemical products and the food products, agricultural and fisheries product processing industries, and Germany in the general machinery industry [See Table 2-1].

Diagram 2-3: Share of Each Industry by Region/Country



(Source: JETRO Survey, Japan External Trade Organization)

Table 2-1: Top Five Industries by Region/Country

| | 1st | 2nd | 3rd | 4th | 5th |
|----------------|---|--|---|---------------------------------------|---------------------------------------|
| Western Europe | Chemical/petrochemical products (15.4%) | Transportation machinery parts (14.1%) | General machinery (11.1%) | Electric and electronic parts (10.1%) | Electric machinery (6.8%) |
| UK | Transportation machinery parts (19.8%) | Chemical/petrochemical products (12.9%) | Electric machinery (10.9%) | General machinery (10.5%) | Electric and electronic parts (8.5%) |
| France | Chemical/petrochemical products (16.4%) | Food products, agricultural and fisheries product processing (13.7%) | Transportation machinery parts (11.0%) | Precision machinery (10.3%) | Electric and electronic parts (8.9%) |
| Germany | General machinery (26.2%) | Electric and electronic parts (13.6%) | Chemical/petrochemical products (11.7%) | Precision machinery (8.7%) | Transportation machinery parts (7.8%) |

(Source: JETRO Survey, Japan External Trade Organization)

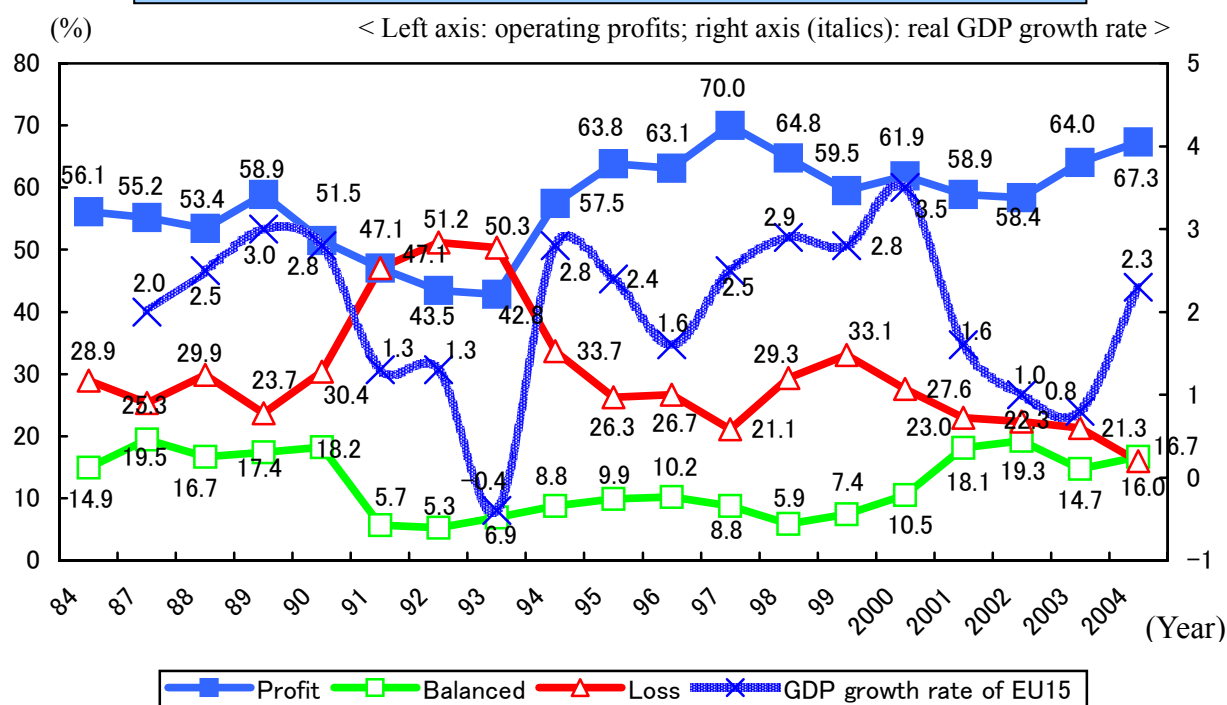
II. Business Conditions and Prospects of Japanese Manufacturing Affiliates in Western Europe

- Most firms continued to enjoy rising operating profits in 2004.
- The operating profits outlook for 2005 is relatively bright.

1. 67% of the companies recorded profits and 16% losses for 2004

Of the companies surveyed, 67.3% (up 3.3 points from the previous survey) projected operating profits, 16.7% (up 2.0 points) projected “balanced”, and 16.0% (down 5.3 points) projected operating losses, and business performance thus remained strong in 2004 [See Diagram 2-4].

Diagram 2-4: Operating Profits for Japanese Manufacturing Affiliates in Western Europe



(Source: Operating profit --- JETRO Survey, Japan External Trade Organization
Real GDP growth rate --- Economic and Financial Affairs DG, European Commission)

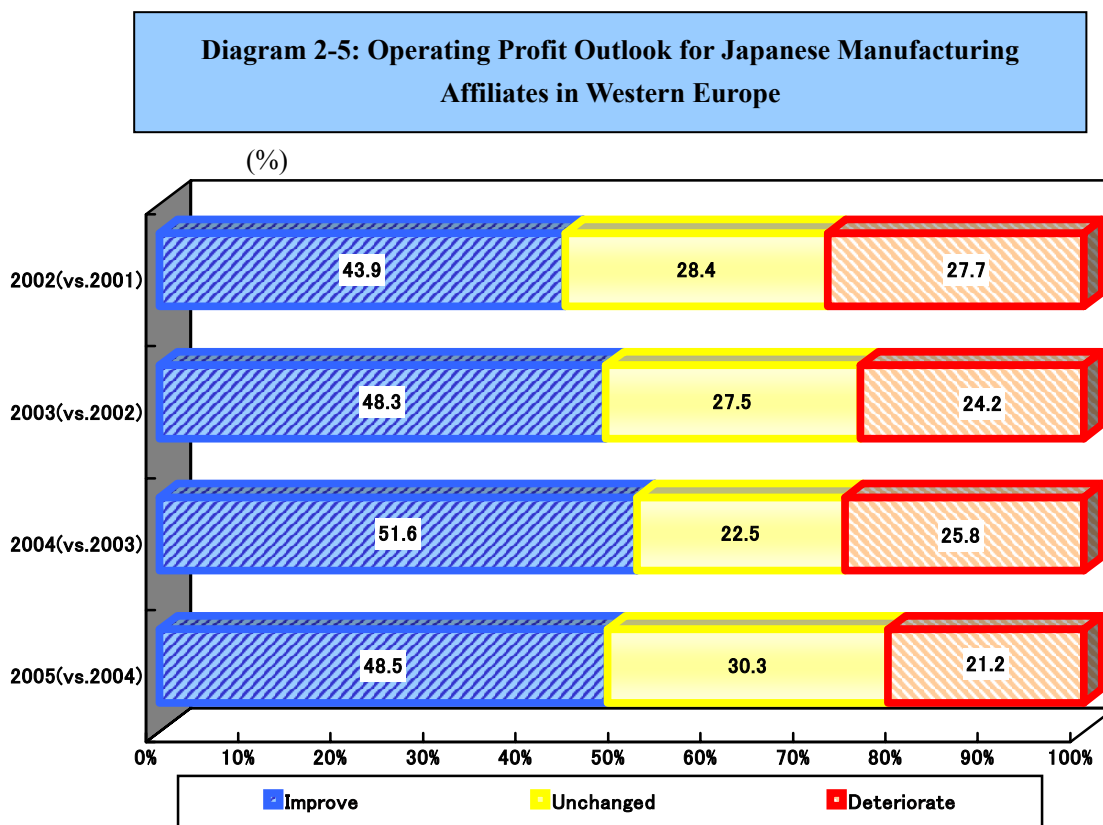
(Note) • Data for 1985 and 1986 are not included. Covers the manufacturing industry only.
• The number of responses differs by year.

By country, 100% of the companies operating in Austria and Finland achieved profits, as did most companies in the Netherlands (84.6%), Ireland (76.9%), and Sweden (75.0%). The industries with the highest percentages of companies reporting profits were the iron and steel industry (100%), the precision machinery industry (85.7%), and the rubber products industry (80.0%).

In comparison with 2003, 51.6% of the companies projected higher operating profits for 2004, an increase of 3.3 points from the previous year's 48.3%. On the other hand, 25.8% of the companies projected deterioration, up 1.6 points from the 2003 figure of 24.2%.

2. More companies project either operating profit improvement or deterioration for 2005

48.5% of the companies projected higher operating profits for 2005 compared with 2004, 30.3% foresaw “unchanged”, and 21.2% expected decreases. The number of companies projecting improvement rose only slightly (up 0.8 point) from the previous survey, while the number of companies projecting deterioration climbed by a higher margin (7.5 points). Although the European economy bottomed out in the first half of 2003 and has been in recovery mode since the latter half of that year, economic growth began to slow in the latter half of 2004, particularly in the euro zone. This is believed to have had an impact on the projected operating profits of Japanese manufacturing affiliates [See Diagram 2-5].



(Source: JETRO Survey, Japan External Trade Organization)

3. Majority of Companies Report No Impact from Stronger Euro

20.9% of companies responded that the stronger euro had contributed to better business results in 2004, while 28.6% reported adverse consequences. A slim majority of companies (50.5%) noted no impact. The countries with the highest percentages of companies reporting negative consequences were Finland (75.0%), Greece (66.7%), Denmark (50.0%), and Germany (48.3%). The industries with the highest percentages of companies adversely affected by the rise in the euro were textiles(yarn/woven material) (75.0%), paper/pulp (75.0%), and food products, agricultural and fisheries product processing (66.7%).

III. Procurement, Production, and Sales Setups

1. Procurement of materials and parts (excluding parts for production equipment)

- The three major procurement sources are Japan, the country of location, and the EU15, the first two

having switched places since the previous survey. Procurement from Asia (excluding Japan and China), China, Central and Eastern European countries, and Russia and CIS countries increased.

- Companies plan to expand procurement from China and Central and Eastern European countries, and reduce procurement from the country of location.

(1) Present procurement sources

--- Japan, the country of location, and the EU15 are the three major procurement sources. Procurement from China and Central and Eastern European countries is notably expanding.

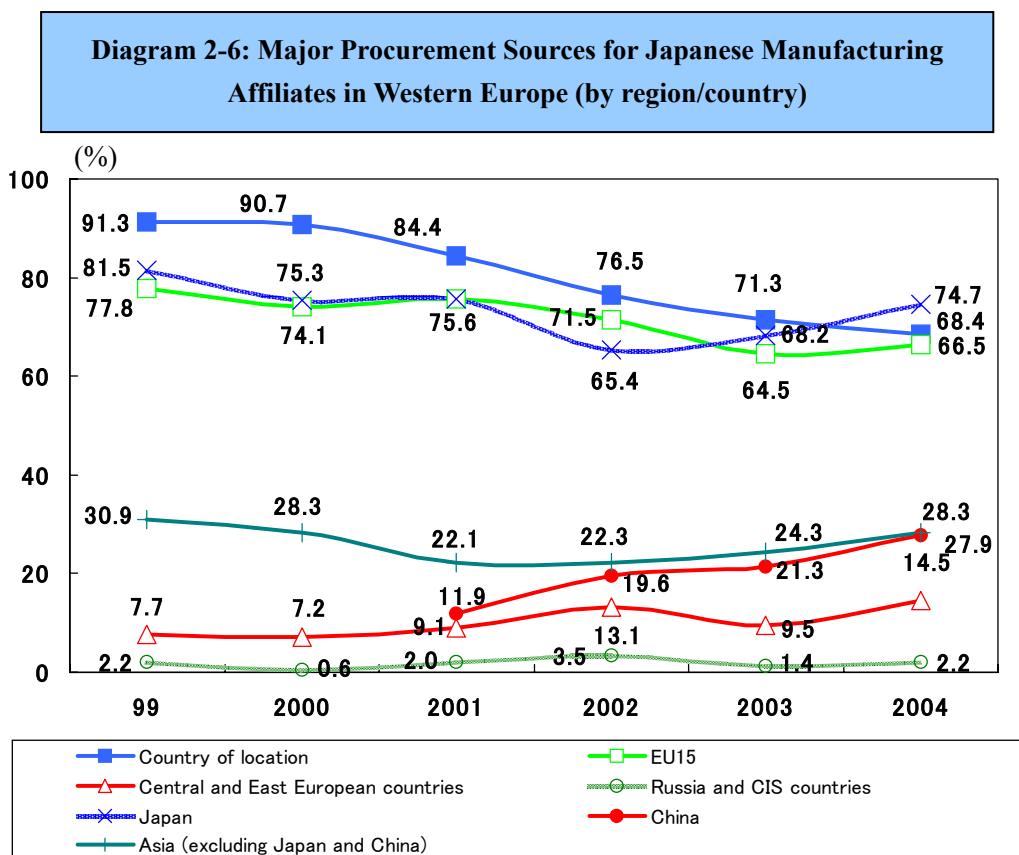
The major procurement sources for materials and parts for Japanese manufacturing affiliates in Western Europe are Japan (up 6.5 points year-on-year to 74.7%), the country of location (down 2.9 points to 68.4%), and the EU15 (up 2.0 points to 66.5%), with Japan ranked as the top procurement source. The rate of procurement from the country of location has continued to decline and the diversification of materials and parts procurement to accelerate, resulting in higher shares for Central and Eastern European countries and China [See Diagrams 2-6 and 2-7].

Procurement sources follow characteristic trends by country [See Diagram 2-7]:

UK: Relatively greater procurement from the country of location (81.9%) and Japan (80.7%)

France: Lower procurement from Japan (66.7%) than seen either in the UK or Germany

Germany: Relatively greater procurement from Japan (78.6%), the EU15 (71.4%), and the country of location (60.7%)

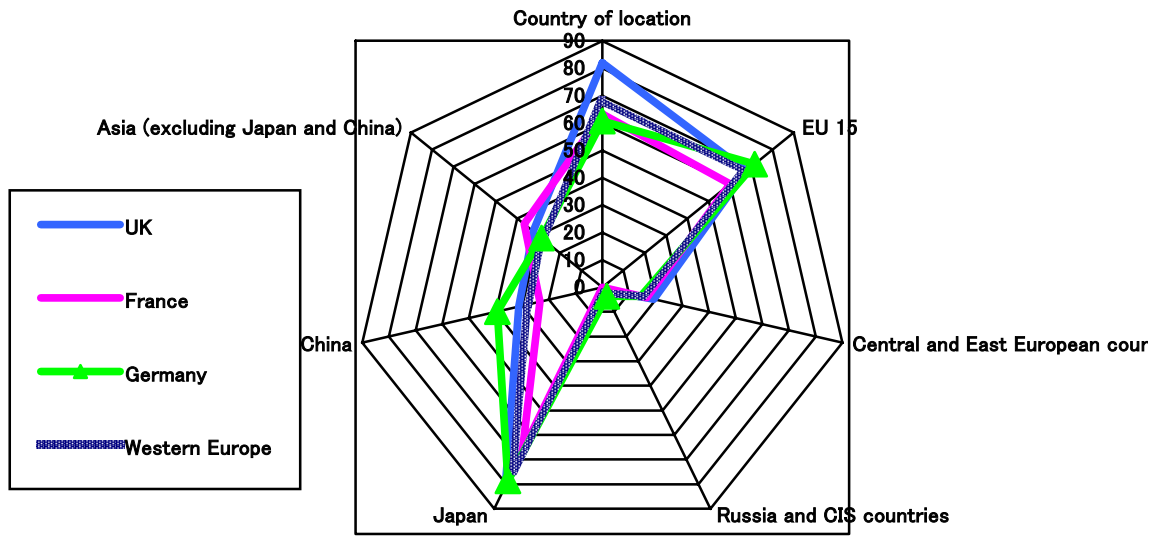


(Source: JETRO Survey, Japan External Trade Organization)

(Multiple responses allowed)

(Note) The number of responses differs by year.

Diagram 2-7: Major Procurement Sources for Japanese Manufacturing Affiliates in Western Europe (UK, France, Germany)



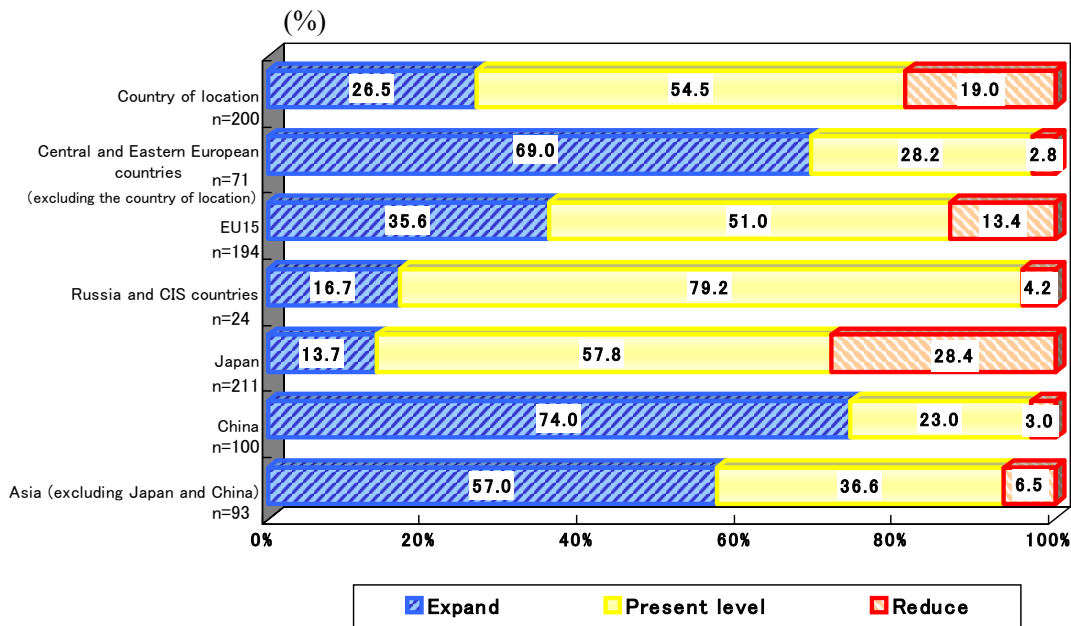
(Source: JETRO Survey, Japan External Trade Organization)

(3) Future procurement policy

--- Companies will expand procurement from China and Central and Eastern European countries and decrease procurement from Japan and the country of location

China (74.0%) tops the list of regions/countries from which Japanese manufacturing affiliates in Western Europe will expand future procurement, followed by Central and Eastern European countries (69.0%), Asia excluding Japan and China (57.0%), and the EU15 (35.6%) [See Diagram 2-8]. The percentage for Asia excluding Japan and China is up a substantial 11.4 points year-on-year as the region continues to garner attention as a future procurement source. At the same time, Japan (28.4%, down 8.9 points from the previous year) ranked first among the regions/countries from which companies said that they would reduce procurement, while 19.0% of companies (up 4.9 points) will seek to reduce procurement from the country of location [See Diagram 2-9].

Diagram 2-8: Future Procurement Policy for Japanese Manufacturing Affiliates in Western Europe (by region/country, 2004)

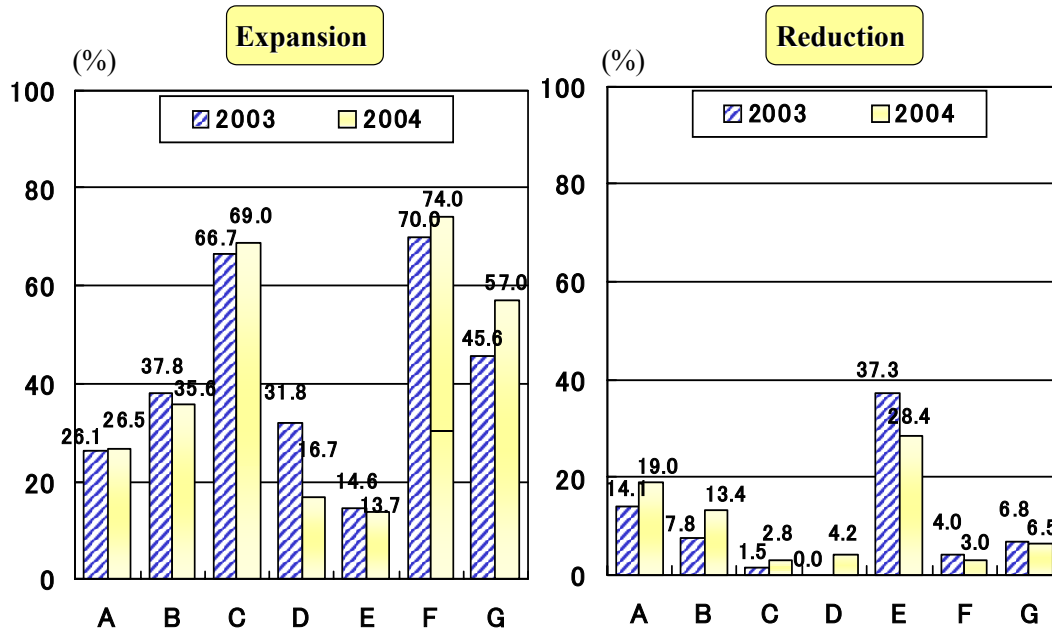


(Source: JETRO Survey, Japan External Trade Organization)

(Multiple responses allowed)

Diagram 2-9: Future Procurement Policy for Japanese Manufacturing Affiliates in Western Europe (2003 vs. 2004)

(Multiple responses allowed)



(A: Country of location B: EU15 C: Central and Eastern European countries D: Russia and CIS countries E: Japan F: China G: Asia <excluding Japan and China>)

(Source: JETRO Survey, Japan External Trade Organization)

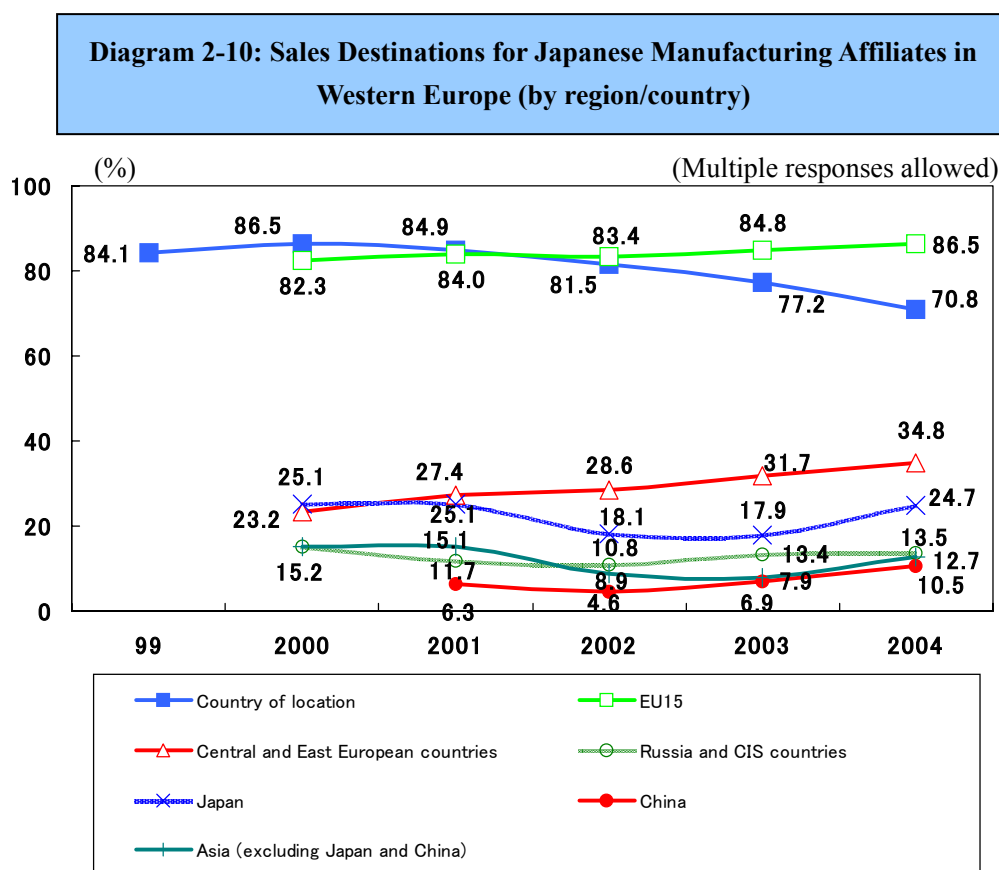
2. Sales Destinations

- Approximately 70% of the companies have sales destinations in the EU15 and the country of location.
- Sales destinations in Central and Eastern European countries and in Russia and CIS countries are on an expansionary trend.

(1) Present sales destinations

--- Over 70% of sales are to the EU15 and the country of location; slight increase in sales to Central and Eastern European countries

The major sales destinations of Japanese manufacturing affiliates in Western Europe are the EU15 (86.5%, up 1.7 points from the previous survey), followed by the country of location (70.8%, down 6.4 points). Sales to Central and Eastern European countries continued their uptrend, rising 3.1 points from the last survey to 34.8%, and sales to Japan (24.7%), Asia excluding Japan and China (12.7%), and China (10.5%) increased by 6.8 points, 4.8 points, and 3.6 points respectively [See Diagram 2-10].



(Source: JETRO Survey, Japan External Trade Organization)

(Note) The number of responses defers by year.

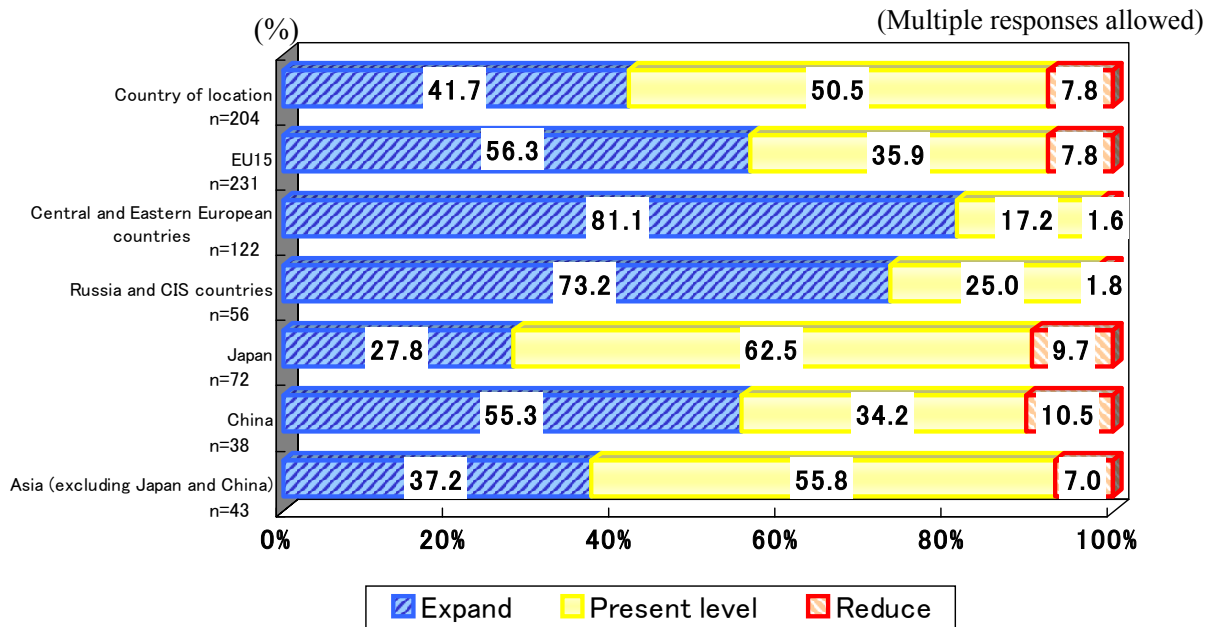
(2) Future sales destinations

--- Sales destinations will expand to Central and Eastern European countries, Russia and CIS countries, and the EU15

The list of regions/countries into which Japanese manufacturing affiliates in Western Europe said that they would expand sales was headed by Central and Eastern European countries (81.1%, up 5.4 points from the

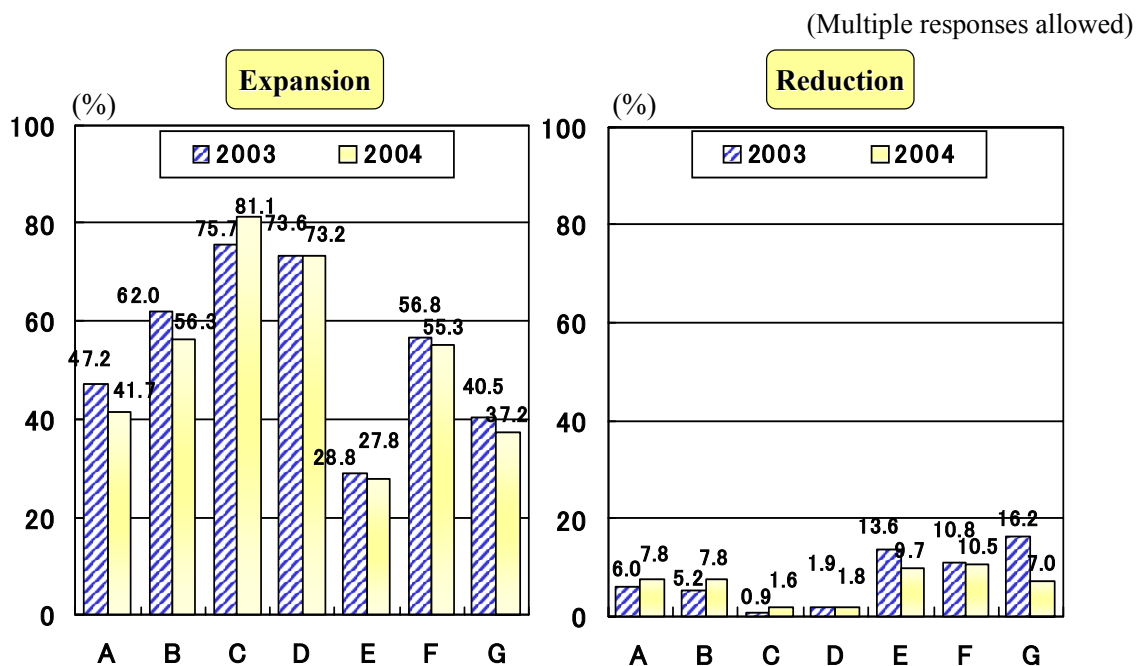
previous survey), followed by Russia and CIS countries (73.2%) and the EU15 (56.3%), reflecting the greater appeal of Central and Eastern European countries as sales markets in the wake of EU enlargement [See Diagrams 2-11 and 2-12].

Diagram 2-11: Future Sales Destinations for Japanese Manufacturing Affiliates in Western Europe (by region/country, 2004)



(Source: JETRO Survey, Japan External Trade Organization)

Diagram 2-12: Future Sales Destinations of Japanese Manufacturing Affiliates in Western Europe (2003 vs. 2004)



(A: Country of location B: EU15 C: Central and Eastern European countries D: Russia and CIS countries E: Japan F: China G: Asia <excluding Japan and China>)

(Source: JETRO Survey, Japan External Trade Organization)

3. Production Setup

--- **Approximately 70% of the companies said they would maintain their present level of production or expand. The Central and Eastern European countries are the leading candidates for new production bases.**

36.4% of Japanese manufacturing affiliates in Western Europe responded that they would expand their future production setups, 33.8% responded that they would maintain the present level, 14.7% responded that they would review production items, 8.8% responded that they would reduce production, 5.5% responded that they would transfer production bases, and 0.7% responded that they would withdraw.

15 of the companies (7 in the UK, 2 each in Germany, Spain and Italy, and 1 each in the Netherlands and Ireland) responded that they intended to transfer their production bases. By industry, 4 companies in electric and electronic machinery, 4 in transportation machinery parts, and 3 companies in electric and electronic parts declared their intentions to transfer their production bases. Candidates for transfer of production bases include the Central and Eastern European countries (cited by 7 companies) and China (cited by 5 companies).

IV. Management Problems

- Labor costs were the most often cited (155 companies) management problem for Japanese affiliates in Western Europe (multiple responses allowed), followed by materials and parts procurement costs (144 companies), and exchange rate fluctuations (133 companies).
- Fewer companies viewed exchange rate fluctuations and the quality of workers as major problems.

Exchange rate fluctuations was the most often cited management problem in the previous survey, but it was displaced in this survey by labor costs (1st place) and materials and parts procurement costs (2nd place). The WEEE Directive will go into effect from August 2005 and the RoHS Directive from July 2006, but only 12.4% and 15.8% of companies respectively pointed to these as management problems, and approximately one-fourth of these companies were located in Germany.

Many companies in the UK regarded exchange rate fluctuations and materials and parts procurement costs as the key problems, and it is likely that exchange rate risks arising from transactions with the euro zone lie behind this perspective. In France, a great number of countries pointed to labor costs and unions/strikes. Companies in Germany cited RoHS compliance in addition to labor costs and materials and parts procurement costs, reflecting circumstances in Germany, where relatively greater progress has been made in developing legal systems for environmental regulation [See Tables 2-2 and 2-3].

Table 2-2: Management Problems (by country) (Multiple responses allowed)

| | Problems most frequently cited by respondent companies | Problems least frequently cited by respondent companies |
|--------------------------------|---|---|
| UK Respondent companies: 84 | Finance: exchange rate fluctuations (61 companies) Materials and parts procurement: costs (55 companies) Labor problems: labor costs (49 companies) | Insufficient infrastructure Investment legislation/procedures |
| France | Labor problems: labor costs (13 companies) | Insufficient infrastructure |

| | | |
|-------------------------------------|---|--|
| Respondent companies: 27 | Labor problems: unions/strikes (11 companies) Finance: exchange rate fluctuations (11 companies) | Environmental regulations |
| Germany Respondent companies: 29 | Labor problems: labor costs (23 companies) Materials and parts procurement: costs (14 companies) Environmental regulations: RoHS (10 companies) | Insufficient infrastructure Standards, certification, and regulations |

(Source: JETRO Survey, Japan External Trade Organization)

Table 2-3: Management Problems for Japanese Manufacturing Affiliates in Western Europe

(Multiple responses allowed)

| 2003 (n=288) | | | | 2004 (n=266) | | | |
|--|---|-----------|------------|--|---|-----------|------------|
| Category | Problem | Responses | Percentage | Category | Problem | Responses | Percentage |
| Finance | Exchange rate fluctuations | 186 | 64.6 % | Labor problems | Labor costs | 155 | 58.3 % |
| Labor problems | Labor costs | 163 | 56.6 % | Materials and parts procurement | Costs | 144 | 54.1 % |
| Materials and parts procurement | Costs | 148 | 51.4 % | Finance | Exchange rate fluctuations | 133 | 50.0 % |
| Labor problems | Quality of workers | 113 | 39.2 % | Labor problems | Quality of workers | 97 | 36.5 % |
| Labor problems | Securing human resources | 112 | 38.9 % | Labor problems | Securing human resources | 93 | 35.0 % |
| Standards, certification and regulations | CE mark | 92 | 31.9 % | Materials and parts procurement | Deliveries | 85 | 32.0 % |
| Materials and parts procurement | Deliveries | 91 | 31.6 % | Standards, certification and regulations | CE mark | 85 | 32.0 % |
| Materials and parts procurement | Quality | 89 | 30.9 % | Investment legislation/procedures | Visa/work permits | 70 | 26.3 % |
| Investment legislation/procedures | Visa/work permits | 79 | 27.4 % | Materials and parts procurement | Quality | 66 | 24.8 % |
| Tax systems/procedures | Tax rates | 71 | 24.7 % | Tax systems/procedures | Tax rates | 51 | 19.2 % |
| Trade legislation/procedures | Tariff | 55 | 19.1 % | Trade legislation/procedures | Tariff | 48 | 18.0 % |
| Labor problems | Social security system | 54 | 18.8 % | Labor problems | Unions/strikes | 48 | 18.0 % |
| Labor problems | Unions/strikes | 51 | 17.7 % | Environmental regulations | RoHS | 42 | 15.8 % |
| Standards, certification and regulations | Environmental regulations such as WEEE, RoHS, etc. | 50 | 17.4 % | Labor problems | Social security system | 39 | 14.7 % |
| Tax systems/procedures | Complex procedures | 40 | 13.9 % | Environmental regulations | WEEE | 33 | 12.4 % |
| Investment legislation/procedures | Complex administrative procedures | 36 | 12.5 % | Tax systems/procedures | Complex procedures | 32 | 12.0 % |
| Trade legislation/procedures | Complex administrative procedures | 34 | 11.8 % | Trade legislation/procedures | Complex administrative procedures | 28 | 10.5 % |
| Tax systems/procedures | Double taxation | 23 | 8.0 % | Investment legislation/procedures | Complex administrative procedures | 24 | 9.0 % |
| Investment legislation/procedures | Frequent legislation revisions | 21 | 7.3 % | Standards, certification and regulations | Other | 23 | 8.6 % |
| Insufficient infrastructure | Communication | 21 | 7.3 % | Tax systems/procedures | Double taxation | 19 | 7.1 % |
| Insufficient infrastructure | Power supply | 20 | 6.9 % | Insufficient infrastructure | Other transportation situations (public institutions) | 19 | 7.1 % |
| Trade legislation/procedures | Point-of-origin rules | 18 | 6.3 % | Investment legislation/procedures | Frequent legislation revisions | 16 | 6.0 % |
| Finance | Funds procurement | 18 | 6.3 % | Environmental regulations | ELV | 16 | 6.0 % |
| Tax systems/procedures | Other | 14 | 4.9 % | Insufficient infrastructure | Communication | 15 | 5.6 % |
| Trade legislation/procedures | Anti-dumping measures | 13 | 4.5 % | Environmental regulations | REACH | 14 | 5.3 % |
| Standards, certification and regulations | Other | 13 | 4.5 % | Finance | Funds procurement | 14 | 5.3 % |
| Insufficient infrastructure | Roads | 12 | 4.2 % | Insufficient infrastructure | Roads | 12 | 4.5 % |
| Insufficient infrastructure | Other transportation situations (public institutions) | 11 | 3.8 % | Insufficient infrastructure | Power supply | 12 | 4.5 % |
| Other | Competition law | 11 | 3.8 % | Trade legislation/procedures | Point-of-origin rules | 10 | 3.8 % |
| Trade legislation/procedures | Other | 9 | 3.1 % | Environmental regulations | Other | 10 | 3.8 % |
| Labor problems | Other | 8 | 2.8 % | Tax systems/procedures | Other | 9 | 3.4 % |
| Insufficient infrastructure | Other | 7 | 2.4 % | Other | Competition law | 9 | 3.4 % |
| Insufficient infrastructure | Port facilities | 7 | 2.4 % | Trade legislation/procedures | Anti-dumping measures | 8 | 3.0 % |
| Trade legislation/procedures | Most-favored-nation treatment | 5 | 1.7 % | Trade legislation/procedures | Other | 7 | 2.6 % |
| Materials and parts procurement | Other | 4 | 1.4 % | Labor problems | Other | 5 | 1.9 % |
| Finance | Other | 3 | 1.0 % | Standards, certification and regulations | Animal/plant quarantines | 5 | 1.9 % |
| Investment legislation/procedures | Other | 3 | 1.0 % | Insufficient infrastructure | Port facilities | 5 | 1.9 % |
| Standards, certification and regulations | Animal/plant quarantines | 1 | 0.3 % | Materials and parts procurement | Other | 4 | 1.5 % |
| | | | | Finance | Other | 3 | 1.1 % |
| | | | | Investment legislation/procedures | Other | 3 | 1.1 % |
| | | | | Insufficient infrastructure | Other | 2 | 0.8 % |
| | | | | Trade legislation/procedures | Most-favored-nation treatment | 1 | 0.4 % |

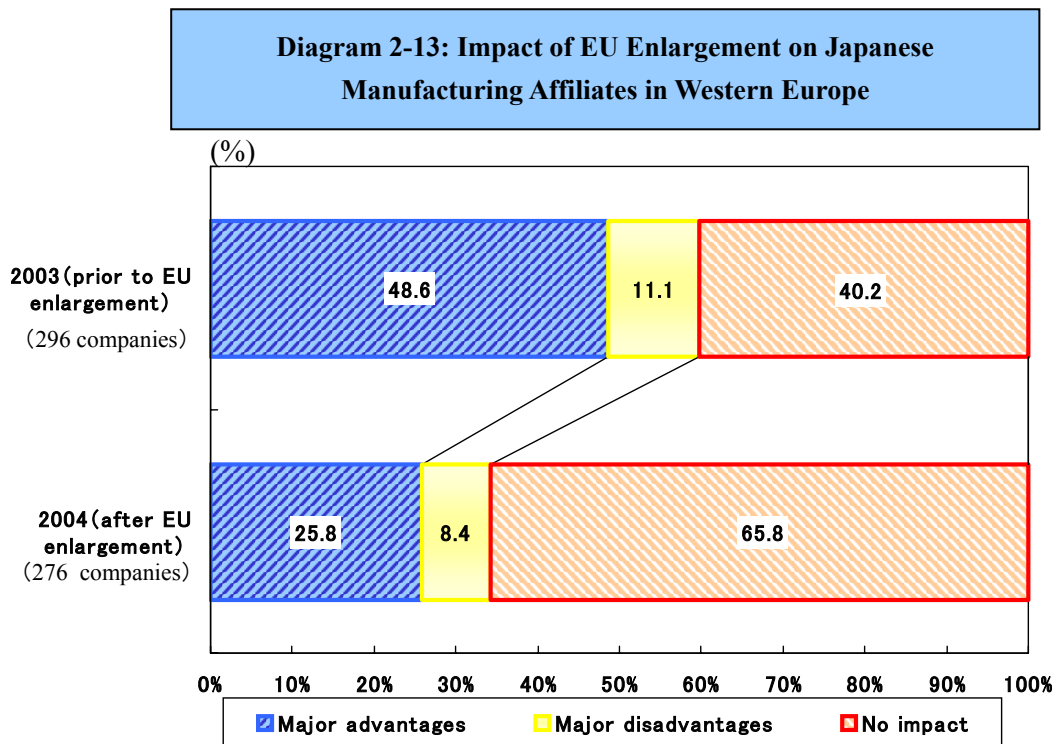
(Source: JETRO Survey, Japan External Trade Organization)

※ The response rate in Table 2-3 is based on the total number of companies responding to this portion of the survey (Management Problems), and hence will not match the component ratios listed in the spreadsheet.

V. EU Enlargement

- 25.8% of Japanese manufacturing affiliates in Western Europe responded that EU enlargement has major advantages, representing a substantial drop of 22.8 points from the previous survey. 8.4% of companies (down 2.7 points) perceive major disadvantages, while 65.8% (up 25.6 points) said that it will not have any impact.
- Over 60% of the companies pointed to simplified customs procedures and expansion of sales markets as advantages.
- Over 70% of the companies cited decreased competitive edge as a production base (73.9%) as a disadvantage.

25.8% of the Japanese manufacturing affiliates in Western Europe responded that EU enlargement brings with it major advantages, 8.4% answered that it has major disadvantages, and 65.8% asserted that it would not have any impact on their business. The percentage of companies perceiving major advantages dropped a sizeable 22.8 points from the previous survey, while the percentage of those seeing no impact climbed an even greater 25.6 points [See Diagram 2-13].



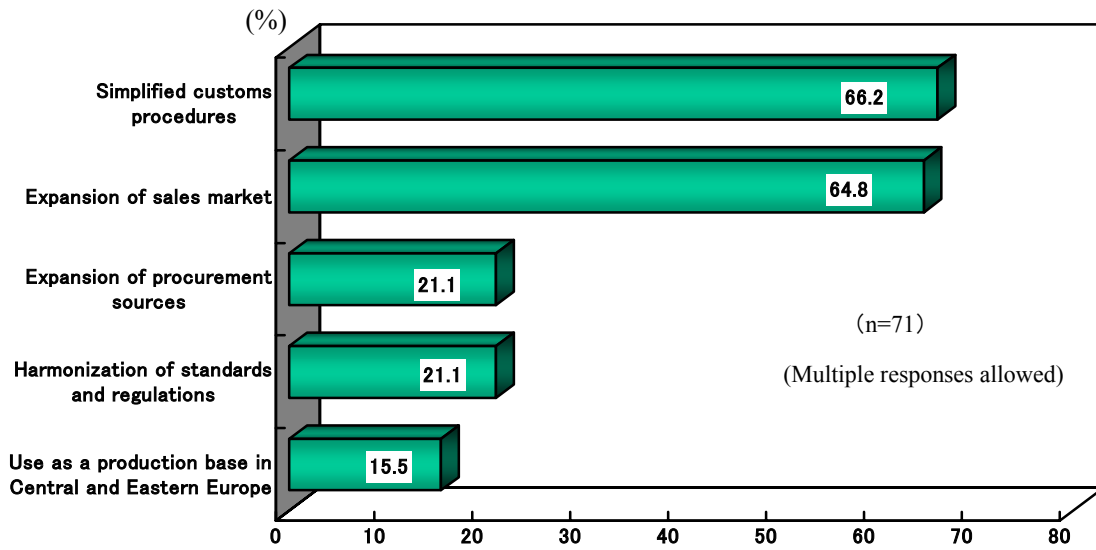
(Source: JETRO Survey, Japan External Trade Organization)

The countries with the highest percentages of companies identifying major advantages in EU enlargement were Austria (80%), Denmark (50%), and Sweden (37.5%), while Greece (33.3%) and Portugal (25.0%) had the highest percentages of companies perceiving major disadvantages.

Many companies in the transportation machinery (50%) and electric and electronic parts (42.9%) industries anticipate major advantages.

The most often cited advantages of EU enlargement were simplified customs procedures (66.2%) and expansion of sales markets (64.8%), followed by expansion of procurement sources (21.1%) and harmonization of standards and regulations (21.1%) [See Diagram 2-14].

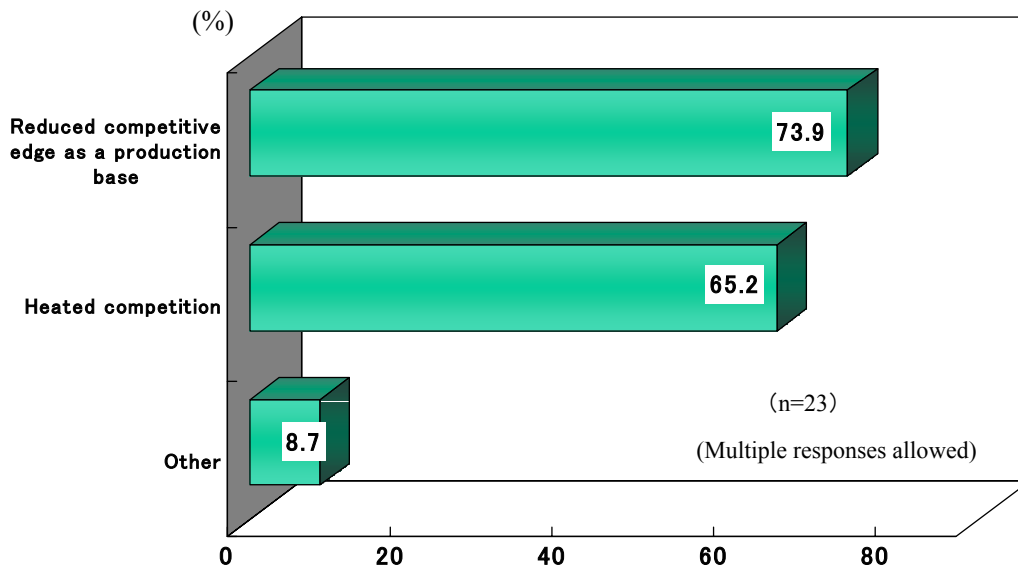
Diagram 2-14: Advantages of EU Elargement for Japanese Manufacturing Affiliates in Western Europe



(Source: JETRO Survey, Japan External Trade Organization)

The most frequently cited disadvantages of EU enlargement were decreased competitive edge as a production base (73.9%), ranked highest in the last survey as well, followed by heated competition (65.2%, up 7.6 points) [See Diagram 2-15].

Diagram 2-15: Disadvantages of EU Elargement for Japanese Manufacturing Affiliates in Western Europe



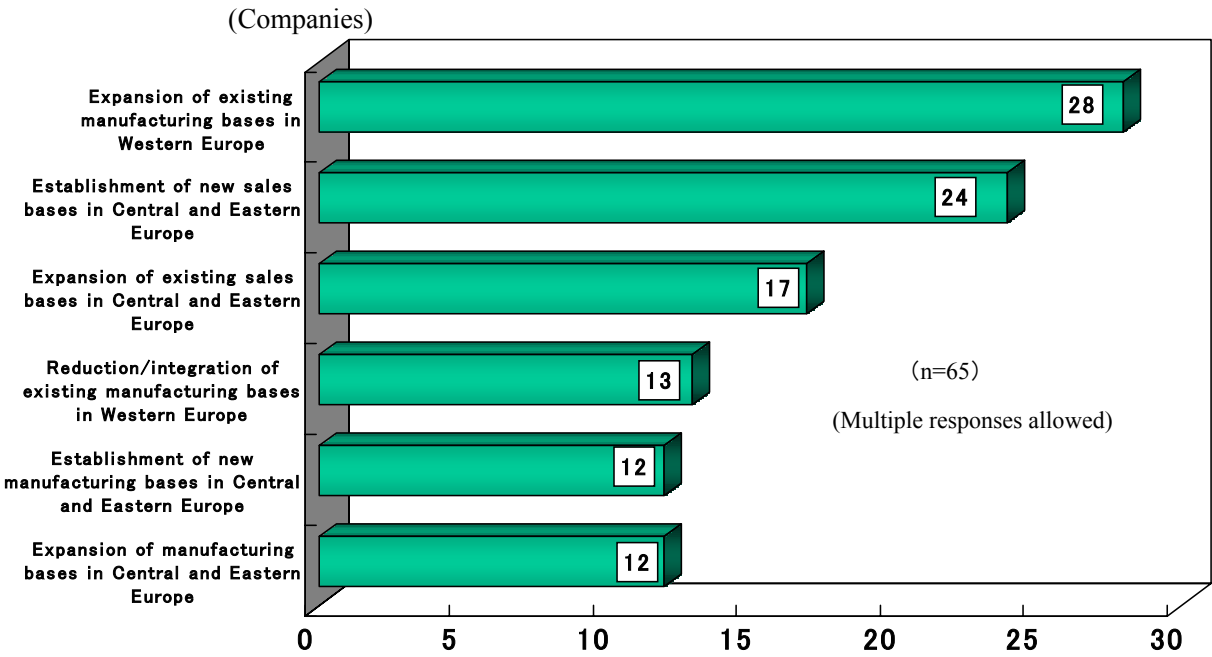
(Source: JETRO Survey, Japan External Trade Organization)

The step most commonly taken by Japanese manufacturing affiliates in Western Europe in response to EU

enlargement was expansion of existing manufacturing bases in Western Europe (28 companies), followed by establishment of new sales bases in Central and Eastern Europe (24 companies) and expansion of existing sales bases in Central and Eastern Europe (17 companies). Anticipating an eastward expansion of sales markets due to EU enlargement, companies are adopting a strategy of enhancing their sales capabilities in Central and Eastern Europe while upgrading their existing manufacturing bases in Western Europe [See Diagram 2-16].

11 companies set up new bases in Western Europe and 35 companies augmented their bases there, while 41 companies established new bases in Central and Eastern European countries and 32 companies upgraded their bases in that region. On the other hand, 19 companies will reduce or withdraw their bases in Western Europe, and 10 companies (3 in the UK, 3 in Germany, and 1 each in Ireland, Spain, Italy, and Portugal) have transferred bases from Western Europe to Central and Eastern Europe; this illustrates an accelerating shift of manufacturing and sales bases to Central and Eastern Europe following EU enlargement.

Diagram 2-16: Reactions to EU Enlargement by Japanese Manufacturing Affiliates in Western Europe



(Source: JETRO Survey, Japan External Trade Organization)

Table: Japanese Manufacturing Affiliates Newly Entering Western Europe in 2004

| Country | Local company name | Japanese company name | Established | Line of business |
|---------|--|---|-------------|---|
| UK | NPL Technologies Limited | Arrk Corp. (Arrk Product Development Group) | 2004 | Manufacture of models, experimental products and metal molds for the automotive and aircraft industries |
| UK | Precision Technologies International Ltd. | TSUDAKOMA Corporation | 2004 | Manufacture of multispindle head units for processing automotive parts and measuring table systems for turbines for aircraft and generators |
| UK | Shoda Sauces Europe Company Limited | Shoda Syoyu Co., Ltd. | 2004 | Manufacture of authentically brewed soy sauce |
| France | DAIKIN CHEMICAL FRANCE S.A.S | Daikin Industries, Ltd. | 2004 | Manufacture of fluororubber |
| Germany | Celon AG medical instruments | Olympus Corporation | 2004 | R&D, manufacture and sales of medical apparatuses (endoscopes) |
| Germany | DAS Duennschicht Anlagensysteme GmbH Dresden | Mitsubishi Kakoki Kaisha, Ltd. | 2004 | Manufacture of exhaust gas removing devices |
| Germany | SMB Modell- und Werkzeugbau GmbH, Shin Nippon Koki Co., Ltd. | Shin Nippon Koki Co., Ltd. | 2004 | Manufacture of plastic molds |
| Spain | Denso Sistemas Térmicos España, S.A. | Denso Corp. (Denso Thermal Systems, S.p.A.) | 2004 | Manufacture and sales of car air conditioner- and radiator-related products |
| Spain | Ibérica de Suspensiones, S.L. | NHK Spring Co., Ltd., Sojitz Corp. | 2004 | Manufacture and sales of coil springs and stabilizers for motor vehicles |
| Italy | AIDA S.r.l. | Aida Engineering, Ltd. | 2004 | Manufacture and sales of presses |
| Italy | Vegitalia S.p.A. | Kagome Co., Ltd. | 2004 | Manufacture and sales of frozen vegetables |

Central and Eastern Europe

I. Overview of Japanese Manufacturing Affiliates in Central and Eastern Europe

--- The number of Japanese manufacturing affiliates increased by 19 to 160

[Number of Japanese manufacturing affiliates in Central and Eastern Europe]

- The number of Japanese manufacturing affiliates at the end of 2004 was 160, including 19 new entrants in 2004.
- Of the 19 new entrants, (1) 18 are located in the Czech Republic, Hungary or Poland, (2) 14 already have bases in Western Europe, and (3) 8 are in the transportation machinery and parts industry.

[By country]

- The Czech Republic had the most affiliates (up 9 companies to 62), followed by Hungary (up 4 companies to 42) and Poland (up 5 companies to 36); these three countries account for 87.5% of the Japanese affiliates in Central and Eastern Europe.

[By industry]

- The transportation machinery and parts industry had the largest number of companies (70, or 43.8% of the total), followed by the electric machinery and electric and electronic parts industry (34 companies or 21.3%).

1. Expansion continues at robust pace, concentrated in three Central European countries and the transportation machinery parts industry

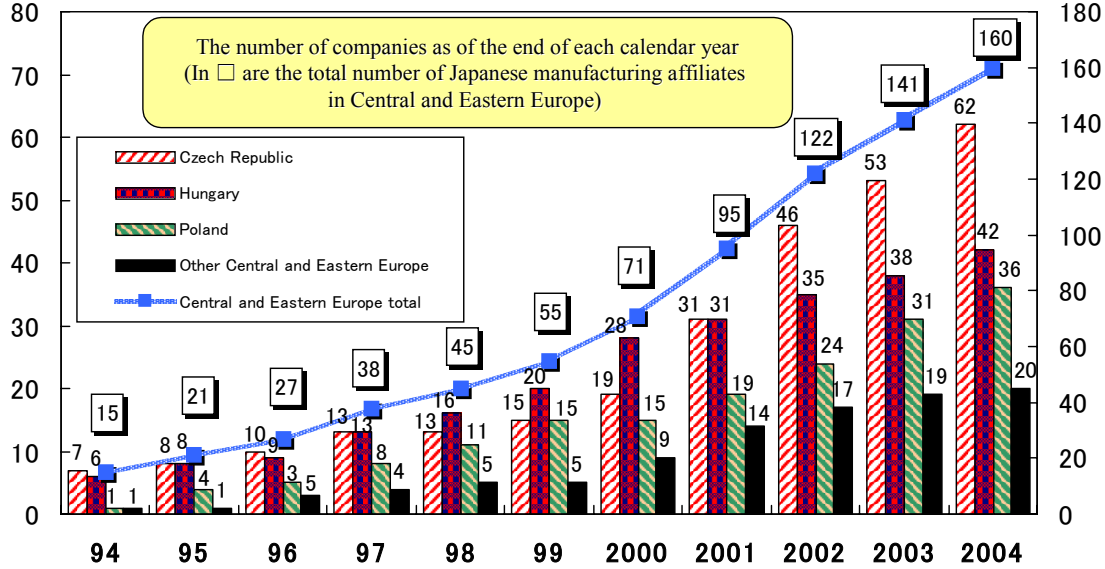
The latest survey revealed 160 Japanese manufacturing affiliates in Central and Eastern Europe. 19 companies newly entered Central and Eastern Europe during 2004, which was lower than the record established in 2002 (27 entrants), but the number continued to grow at a robust pace. Of the new entrants in 2004, 14 companies also have bases in Western Europe. 18 companies are located in the Czech Republic, Hungary, or Poland, and these three countries account for 87.5% (up 1 point from the previous survey) of Japanese affiliates in Central and Eastern European countries [See Diagrams 3-1 and 3-2].

Among Central and Eastern European countries, the largest number of companies were located in the Czech Republic (up 9 companies to 62 compared with the end of 2003), which passed the Netherlands to rank 6th Europe-wide. The next most popular Central and Eastern European countries for expansion were Hungary (up 4 companies to 42) and Poland (up 5 companies to 36).

**Diagram 3-1: Development of Japanese Manufacturing
Affiliates in Central and Eastern Europe**

< Left axis: specific numeric value (bar graph); right axis:
Central and Eastern Europe total (sequential line graph) >

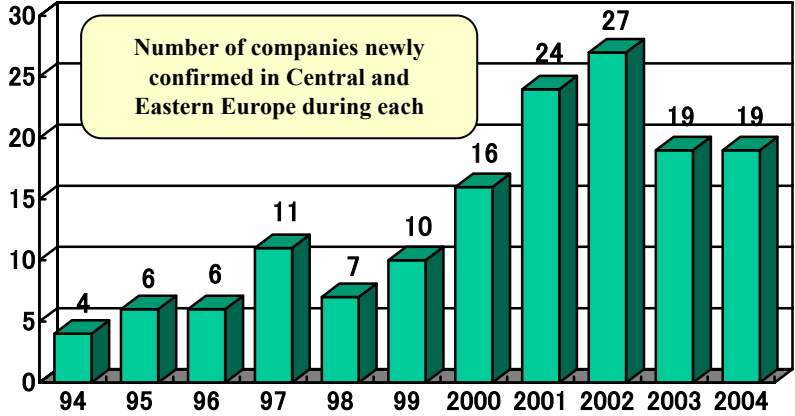
(Companies)



(Source: JETRO Survey, Japan External Trade Organization)

**Diagram 3-2: Japanese Manufacturing Affiliates Newly
Entering Central and Eastern Europe**

(Companies)



(Source: JETRO Survey, Japan External Trade Organization)

2. No halt to momentum of expansion in transportation machinery and parts industry

The most prevalent industry among affiliates is the transportation machinery and parts industry (70 companies, or 43.8% of Japanese manufacturing affiliates in Central and Eastern Europe), followed by the electric machinery and electric and electronic parts industry (34 companies, or 21.3%). These two top

industries account for 65% of the affiliates. Of the 19 companies that expanded into Central and Eastern Europe in 2004, 8 companies are in transportation machinery and parts industry. 3 of the 9 new entrants in the Czech Republic and 3 of the 5 new entrants in Poland are in the transportation machinery and parts industry.

II. Business Conditions and Prospects of Japanese Manufacturing Affiliates in Central and Eastern Europe

--- 2004 was a profitable year, propelled by active investment in the automobile industry, and the outlook for operating profits is bright.

- Operating profits made another strong showing in 2004 (profits continued to outpace losses)
- Projections for operating profits in 2005 are upbeat (more companies projecting improvement and fewer companies projecting deterioration).

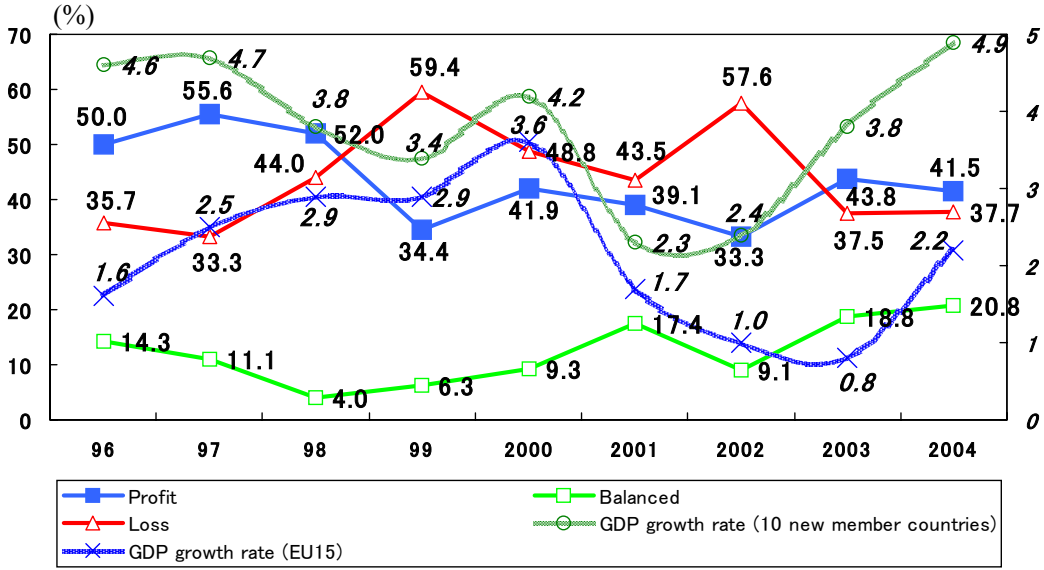
1. Operating profits continued strong showing despite some deceleration since 2003

Of the companies surveyed in Central and Eastern European countries, 41.5% of the companies projected operating profits for 2004 (down slightly from the previous survey's figure of 43.8%), 20.8% of companies projected "balanced" (up 2.0 points), and 37.7% projected operating losses (up 0.2 points) [see Diagram 3-3]. Companies projecting higher profits in 2004 than in 2003 made up 48.1% of the total, representing a substantial drop from the previous survey (60.9%). Although 2004 was a profitable year, the sharp turnaround in profits from 2002 to 2003 and the rising value of local currencies made the year's business performance seemed somewhat subdued. Responses to EU enlargement and rising labor costs characterized the adjustment phase of the transition period [See Diagram 3-4].

According to the European Commission's Statistics Bureau, real GDP growth rate for the 25 EU member states rebounded from 0.9% in 2003 to 2.3% in 2004 and that for the 10 newly admitted nations from 3.8% to 4.9%, indicative of steady economic growth. The European Commission has forecasted an economic growth rate of 2.3% for the EU25 in 2005 and a firm 4.4% in the 10 new member countries. Favored by a vigorous influx of investment, industries in Central and Eastern Europe are expected to support economic growth from 2005 on.

**Diagram 3-3: Operating Profits for Japanese Manufacturing
Affiliates in Central and Eastern Europe**

<Left axis: operating profits; right axis (italics): real GDP growth rate>



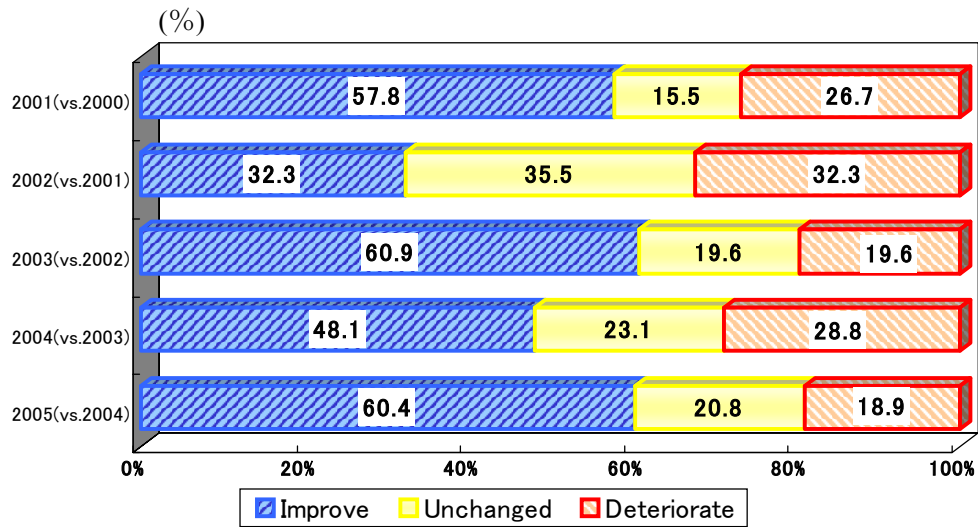
(Source: Operating profit --- JETRO Survey, Japan External Trade Organization
Real GDP growth rate --- Economic and Financial Affairs DG, European Commission)

2. Outlook for operating profits in 2005 is upbeat

60.4% of the companies projected higher operating profits for 2005 compared with 2004, 20.8% projected “unchanged”, and 18.9% projected deterioration. The percentage of companies projecting improvement in 2004 operating profits shot up by 12.3 points, and the percentage of companies projecting deterioration fell by 9.9 points. In contrast to 2004, when the effects of EU enlargement were still being ascertained, the outlook for 2005 reflects companies’ high expectations of business in Central and Eastern Europe, where the positive effects of EU enlargement have begun to appear and accelerate [See Diagram 3-4].

The outlook for operating profits in 2005 is bright, given the expansion of the automobile industry in Central and Eastern Europe. In fact, 68.8% of the Japanese manufacturing affiliates that produce transportation machinery parts in Central and Eastern Europe projected profits in 2005.

Diagram 3-4: Operating Profit Outlook for Japanese Manufacturing Affiliates in Central and Eastern Europe



(Source: JETRO Survey, Japan External Trade Organization)

III. Procurement, Production and Sales Setups

1. Procurement of materials and parts (excluding parts for production equipment)

- The major procurement sources at present are the EU15, Japan, and the country of location, in that order. Procurement from the country of location has increased considerably.
- Companies plan to expand procurement from the EU15, the country of location, and Central and Eastern European countries.
- There is a strong trend toward reducing procurement from Japan.

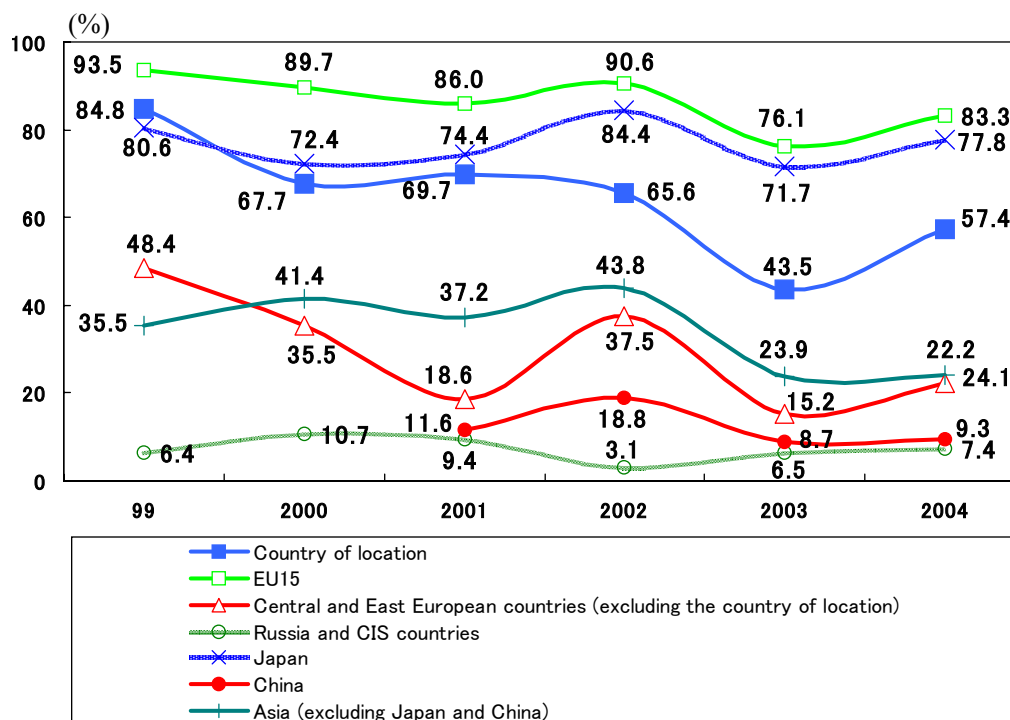
(1) Present procurement sources

--- The major procurement sources for the past 5 years have been the EU15, Japan and the country of location, in that order. Procurement from the country of location has expanded substantially.

The major procurement sources for materials and parts for Japanese manufacturing affiliates in Central and Eastern European countries are the EU15 (83.3%), Japan (77.8%) and the country of location (57.4%). Procurement from the EU15 and Japan rose by 7.2 points and 6.1 points respectively from the previous year, while procurement from the country of location climbed a much higher 13.9 points. A key factor believed to be behind the latter figure is the expansion of numerous parts/material manufacturers from Japan and other countries into Central and Eastern Europe, which has broadened the options available for local procurement of parts and materials, improved reliability, and lowered prices.

Procurement from Central and Eastern Europe (excluding the country of location) increased 7.0 points to 22.2%, while procurement from Asia (excluding Japan and China) rose 0.2 points to 24.1%. Procurement from China (9.3%, up 0.6 points) and Russia and CIS countries (7.4%, up 0.9 points) remained low [See Diagram 3-5].

Diagram 3-5: Major Procurement Sources for Japanese Manufacturing Affiliates in Central and Eastern Europe (by region/country)



(Source: JETRO Survey, Japan External Trade Organization)

(Multiple responses allowed)

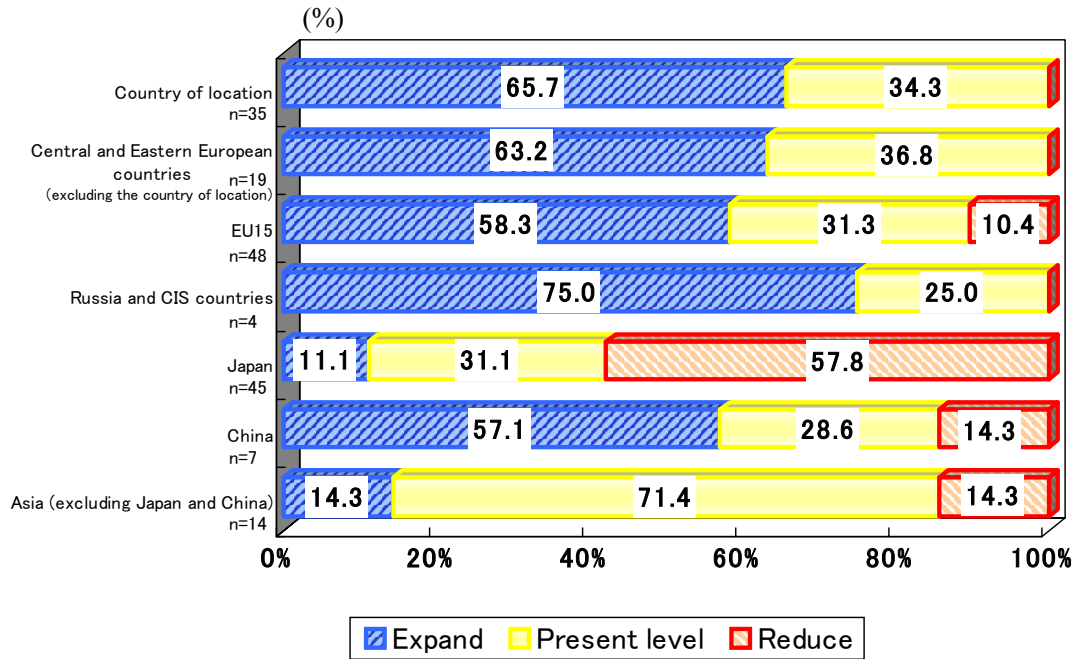
(2) Future procurement policy

--- Procurement from Central and Eastern Europe slowing somewhat, as procurement from the country of location continues to grow. Procurement from Japan is being reduced even further.

Japanese manufacturing affiliates in Central and Eastern Europe, when asked to what regions/countries they would expand procurement in future, most often cited the EU15 (28 companies), the country of location (23 companies), and Central and Eastern European countries, excluding the country of location (12 companies). Japan was most often cited as the region/country from which procurement would be decreased (26 companies), continuing the trend of reducing dependence on Japan in favor of procurement from the country of location and neighboring countries [See Diagram 3-6].

A comparison of the survey results from 2003 (the previous survey) and 2004 reveals significant drops in the percentages of companies seeking to expand procurement from Central and Eastern European countries (excluding the country of location) and Asia (excluding Japan and China) of 20.1 points and 28.6 points respectively. Underlying this decline are that procurement in the country of location has expanded, facilitated by industrial accumulation in the country of origin, and that companies' global production systems have seen greater international division of labor by regional group [See Diagram 3-7].

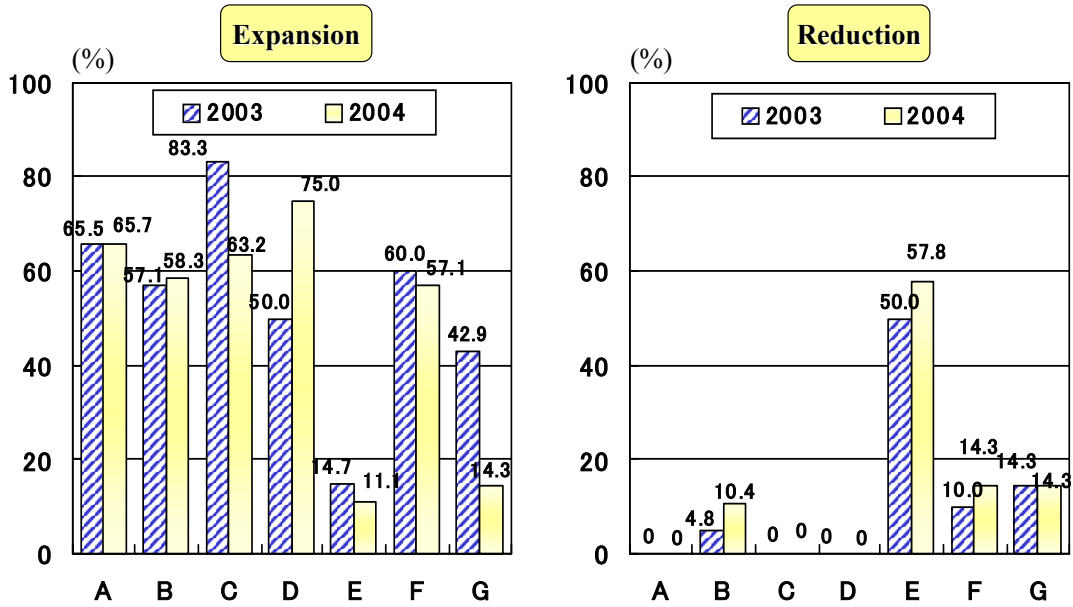
Diagram 3-6: Future Procurement Policy for Japanese Manufacturing Affiliates in Central and Eastern Europe (by region/country, 2004)



(Source: JETRO Survey, Japan External Trade Organization)

(Multiple responses allowed)

Diagram 3-7: Future Procurement Policy for Japanese Manufacturing Affiliates in Central and Eastern Europe (2003 vs. 2004)



(A: Country of location B: EU15 C: Central and Eastern European countries D: Russia and CIS countries E: Japan F: China G: Asia <excluding Japan and China>)

(Source: JETRO Survey, Japan External Trade Organization)

(Multiple responses allowed)

2. Sales Destinations

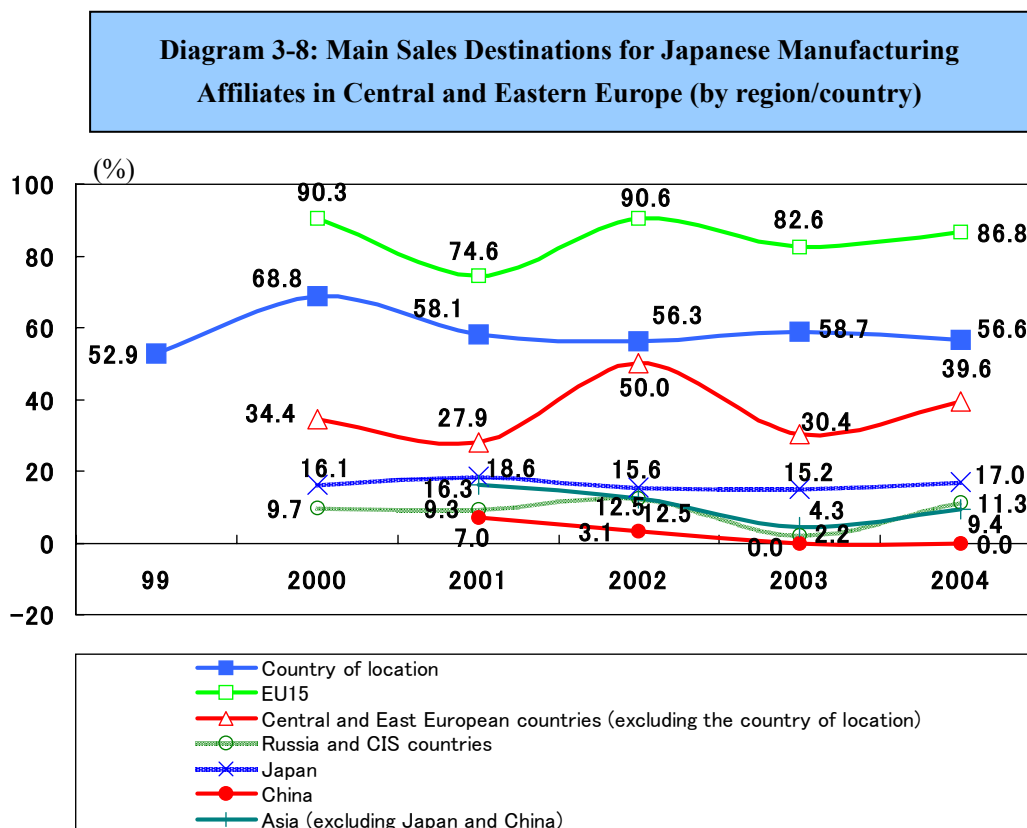
- The percentage of sales to the EU15 is the largest, once again rising.
- Approximately 70% of the companies will expand sales in Europe, e.g., Central and Eastern European countries, the EU15, and the country of location.
- An increasing number of companies intend to expand sales in Russia and CIS countries.

(1) Present sales destinations

--- Sales destinations in Central and Eastern European countries (excluding the country of location) have again expanded, clearly suggesting that the regions have been recognized as markets.

The major sales destinations for Japanese manufacturing affiliates in Central and Eastern European countries are the EU15 (up 4.2 points from the last survey to 86.8%) and the country of location (down 2.1 points to 56.6%). Sales to Central and Eastern European countries increased 9.2 points to 39.6%, again highlighting the trend of expanding sales to Central and Eastern European countries [See Diagram 3-8].

On the other hand, sales to Japan, China, Asia, and Russia and the CIS countries were relatively weak, and companies are evidently choosing to specialize in European markets as part of their global strategies.



(Source: JETRO Survey, Japan External Trade Organization)

(Multiple responses allowed)

(2) Future sales destinations

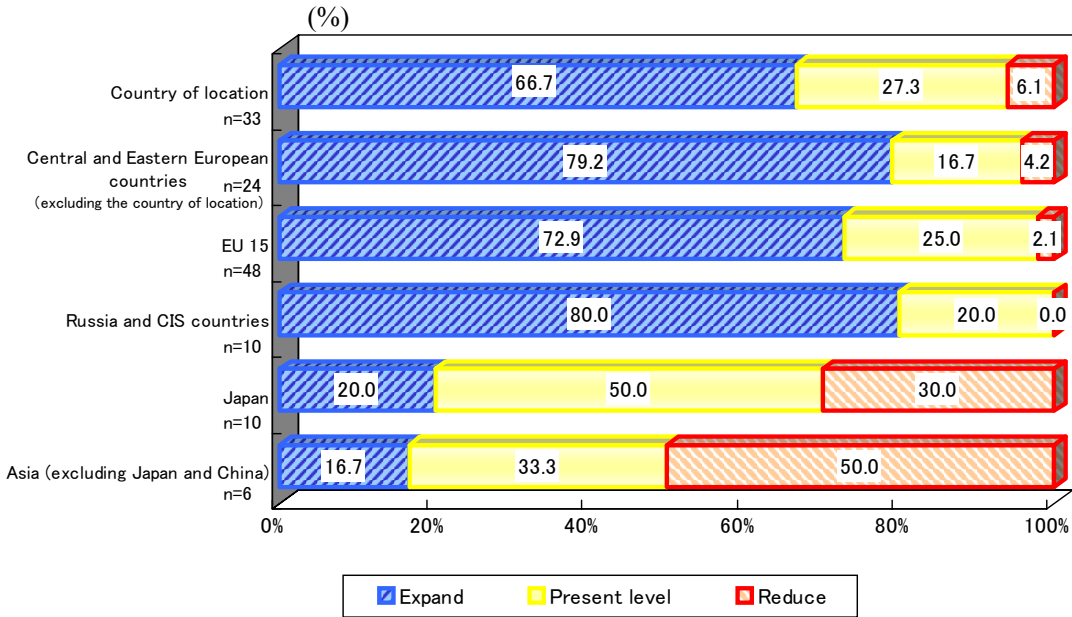
--- There is a general move toward expanding sales to Central and Eastern European countries (excluding the country of location) and reducing sales to Asia.

Japanese manufacturing affiliates operating in Central and Eastern European countries responded that they

were most likely to expand sales to the EU15 (35 companies), the country of location (22 companies), and Central and Eastern European countries excluding the country of location (19 companies). The most often cited regions/countries to which sales would be reduced were Asia and Japan (3 companies each) [See Diagram 3-9].

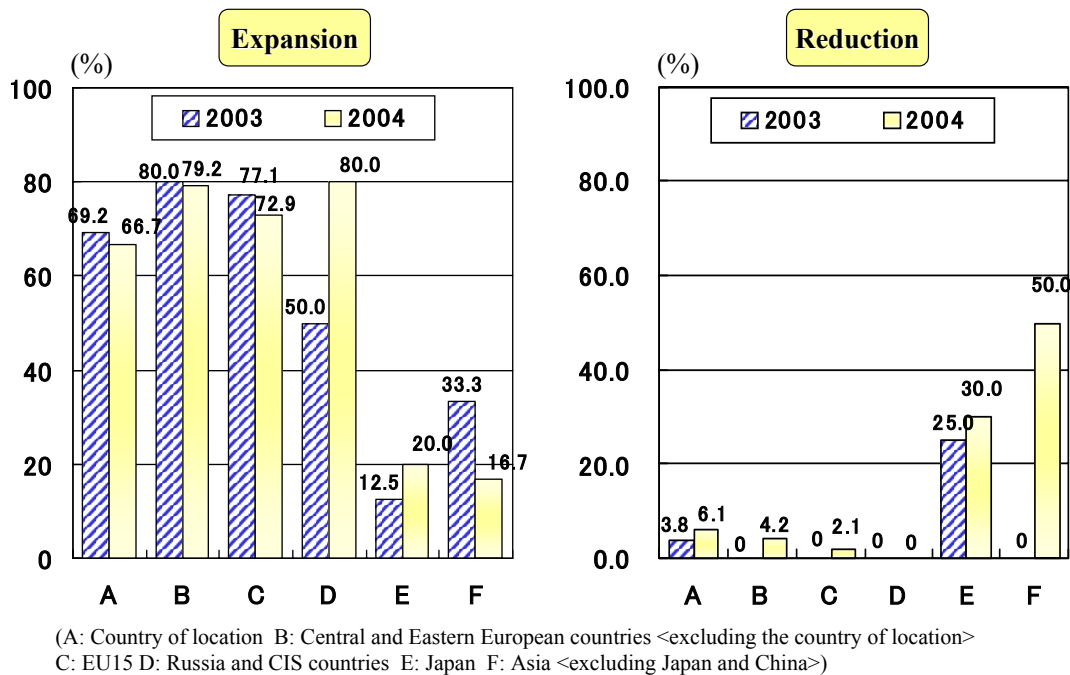
The percentage of companies planning to expand sales in Russia and CIS countries rose 30 points to 80.0%. It appears that companies are increasingly adopting a strategy of expanding sales in Russia and CIS countries as their global strategies promote localization of sales and as the development of other nearby markets lags [See Diagram 3-10].

Diagram 3-9: Future Sales Destinations of Japanese Manufacturing Affiliates in Central and Eastern Europe (by region/country, 2004)



(Source: JETRO Survey, Japan External Trade Organization) (Multiple responses allowed)

Diagram 3-10: Future Sales Destinations of Japanese Manufacturing Affiliates in Central and Eastern Europe (2003 vs. 2004)



(Source: JETRO Survey, Japan External Trade Organization)

(Multiple responses allowed)

3. Production Setups

--- Approximately 80% of affiliates plan to expand production

77.4% of the Japanese manufacturing affiliates in Central and Eastern European countries responded that they would expand production in future; this percentage has increased from the last survey (74.5%). By industry, 88.9% of the companies in transportation machinery and parts and 78.6% of the companies in electric machinery and electronic machinery and parts stated that they plan to expand production.

In the transportation machinery industry, the Toyota-PSA Group will begin production in their new Kolin plant in the Czech Republic in February 2005, with the aim of producing about 300,000 compact cars and other vehicles annually (Toyota's production ceiling is 100,000). Suzuki Motor Corporation has increased production of its Swift superminis in Hungary, and has plans for an annual production of 100,000 cars. In Poland, Toyota Motor Corporation and Toyota Industries Corporation launched production of a new-model diesel engine in March 2005, and Isuzu Motors Limited also proposes to increase production of diesel engines for General Motors Corporation within the year.

IV. Management Problems

- The most commonly cited management problems (multiple responses allowed) for Japanese manufacturing affiliates in Central and Eastern Europe were exchange rate fluctuations (66.7%) and visa/work permits (59.3%).
- Considerable improvements have been made in tariff procedures and other areas.

The most commonly cited management problems in the country of location (multiple responses allowed) for Japanese manufacturing affiliates in Central and Eastern Europe were exchange rate fluctuations (66.7%), visa/work permits (59.3%), materials and parts quality (50.0%), roads (infrastructure) (50.0%), and securing human resources (50.0%) [See Diagram 3-1].

Many management problems garnered lower response rates overall than in the previous survey, and the effects of EU enlargement have likely contributed to improvements on these issues. Among the problems seeing substantial improvements are tariffs (down 35.2 points) and complex (trade-related) administrative procedures (down 22.3 points), the consequences of countries having lifted tariffs and achieved greater efficiency with their accession to the EU. Great strides were made in tax rates as well, for which response rates dropped by 23.0 points as a series of corporate tax rate cuts have been implemented by Central and Eastern European countries in order to attract investment [See Diagram 3-2].

Even as progress was made in many areas, the percentage of companies citing the social security system as a management problem climbed by 10.8 points. EU membership has brought with it not only higher wages but also higher employment costs for employees.

**Table 3-1: Management Problems for Japanese Manufacturing Affiliates
in Central and Eastern Europe**

| 2003 (n=45) | | | | 2004 (n=54) | | | |
|--|---|-----------|------------|--|---|-----------|------------|
| Category | Problem | Responses | Percentage | Category | Problem | Responses | Percentage |
| Investment legislation/procedures | Visa/work permits | 32 | 71.1 % | Finance | Exchange rate fluctuations | 36 | 66.7 % |
| Finance | Exchange rate fluctuations | 32 | 71.1 % | Investment legislation/procedures | Visa/work permits | 32 | 59.3 % |
| Trade legislation/procedures | Complex administrative procedures | 30 | 66.7 % | Materials and parts procurement | Quality | 27 | 50.0 % |
| Labor problems | Securing human resources | 25 | 55.6 % | Insufficient infrastructure | Roads | 27 | 50.0 % |
| Investment legislation/procedures | Complex administrative procedures | 25 | 55.6 % | Labor problems | Securing human resources | 27 | 50.0 % |
| Trade legislation/procedures | Tariff | 25 | 55.6 % | Investment legislation/procedures | Complex administrative procedures | 25 | 46.3 % |
| Labor problems | High absentee rate | 23 | 51.1 % | Trade legislation/procedures | Complex administrative procedures | 24 | 44.4 % |
| Materials and parts procurement | Quality | 23 | 51.1 % | Tax systems/procedures | Complex procedures | 23 | 42.6 % |
| Tax systems/procedures | Tax rates | 22 | 48.9 % | Materials and parts procurement | Deliveries | 23 | 42.6 % |
| Insufficient infrastructure | Roads | 22 | 48.9 % | Standards, certification and regulations | CE mark | 22 | 40.7 % |
| Materials and parts procurement | Deliveries | 22 | 48.9 % | Materials and parts procurement | Costs | 21 | 38.9 % |
| Investment legislation/procedures | Frequent legislation revisions | 22 | 48.9 % | Investment legislation/procedures | Frequent legislation revisions | 20 | 37.0 % |
| Labor problems | Labor costs | 21 | 46.7 % | Labor problems | Social security system | 19 | 35.2 % |
| Standards, certification and regulations | CE mark | 19 | 42.2 % | Labor problems | Labor costs | 17 | 31.5 % |
| Materials and parts procurement | Costs | 18 | 40.0 % | Labor problems | Quality of workers | 17 | 31.5 % |
| Tax systems/procedures | Complex procedures | 17 | 37.8 % | Tax systems/procedures | Tax rates | 14 | 25.9 % |
| Labor problems | Quality of workers | 16 | 35.6 % | Insufficient infrastructure | Power supply | 11 | 20.4 % |
| Insufficient infrastructure | Communication | 11 | 24.4 % | Trade legislation/procedures | Tariff | 11 | 20.4 % |
| Labor problems | Social security system | 11 | 24.4 % | Finance | Funds procurement | 10 | 18.5 % |
| Insufficient infrastructure | Other transportation situations (public institutions) | 10 | 22.2 % | Insufficient infrastructure | Communication | 9 | 16.7 % |
| Insufficient infrastructure | Power supply | 9 | 20.0 % | Tax systems/procedures | Double taxation | 8 | 14.8 % |
| Trade legislation/procedures | Point-of-origin rules | 9 | 20.0 % | Environmental regulations | RoHS | 6 | 11.1 % |
| Standards, certification and regulations | Environmental regulations such as WEEE, RoHS, etc. | 8 | 17.8 % | Insufficient infrastructure | Other transportation situations (public institutions) | 6 | 11.1 % |
| Finance | Funds procurement | 7 | 15.6 % | Environmental regulations | WEEE | 4 | 7.4 % |
| Labor problems | Unions/strikes | 6 | 13.3 % | Other | Competition law | 4 | 7.4 % |
| Tax systems/procedures | Double taxation | 6 | 13.3 % | Trade legislation/procedures | Point-of-origin rules | 3 | 5.6 % |
| Other | Competition law | 4 | 8.9 % | Labor problems | Unions/strikes | 3 | 5.6 % |
| Trade legislation/procedures | Most-favored-nation treatment | 3 | 6.7 % | Environmental regulations | ELV | 3 | 5.6 % |
| Insufficient infrastructure | Port facilities | 2 | 4.4 % | Standards, certification and regulations | Animal/plant quarantines | 2 | 3.7 % |
| Standards, certification and regulations | Animal/plant quarantines | 1 | 2.2 % | Standards, certification and regulations | Other | 2 | 3.7 % |
| | | | | Trade legislation/procedures | Most-favored-nation treatment | 1 | 1.9 % |
| | | | | Insufficient infrastructure | Port facilities | 1 | 1.9 % |
| | | | | Trade legislation/procedures | Anti-dumping measures | 1 | 1.9 % |

(Source: JETRO Survey, Japan External Trade Organization)

Table 3-2: Management Problems Seeing Substantial Improvements

| Category | Item | Points |
|------------------------------------|--|--------|
| Trade legislation/procedures | Tariff | ▲35.2 |
| Tax systems/procedures | Tax rates | ▲23.0 |
| Trade legislation /procedures | Complex administrative procedures | ▲22.3 |
| Labor problems | Labor costs | ▲15.2 |
| Investment legislation /procedures | Frequent legislation revisions | ▲11.9 |
| Investment legislation /procedures | Visa/work permits | ▲11.8 |
| Insufficient infrastructure | Other transportation situations (public institutions) | ▲11.1 |
| Investment legislation /procedures | Complex administrative procedures | ▲9.3 |

▲: decrease in the response rate

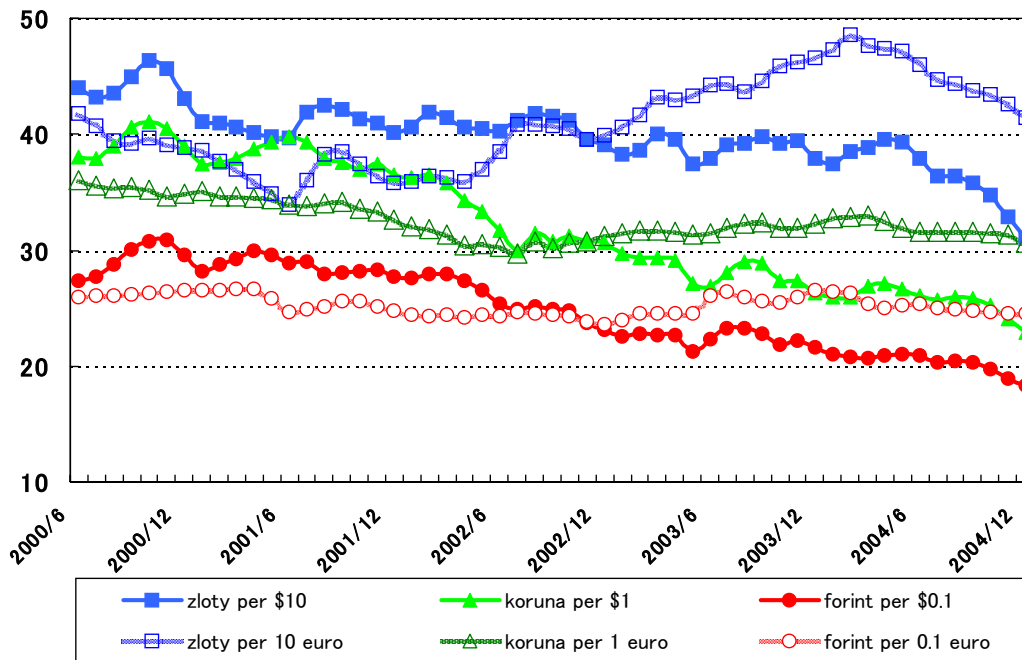
(Source: JETRO Survey, Japan External Trade Organization)

※ The response rates in Tables 3-1 and 3-2 are based on the total number of companies responding to this portion of the survey (Management Problems), and hence will not match the composition ratios listed in the spreadsheet.

The EU Directive on Waste Electrical and Electronic Equipment (WEEE) is scheduled to go into effect from August 2005. Only 11.1% of the companies cited the Directive on the Restriction of the Use of Certain Hazardous Substances in Electrical and Electronic Equipment (RoHS) as a management problem, followed by WEEE (7.4%) and the Directive on End of Life Vehicles (ELV) (5.6%); not a single company cited the REACH (Registration, Evaluation and Authorisation of CHemicals) regulations. Domestic legislation on EU environmental regulations is lagging in individual countries, and it appears that there are few cases where regulatory compliance has become a concrete management problem. On the other hand, a total of 14 Japanese manufacturing affiliates in electric machinery and electronic machinery and parts in Central and Eastern European countries responded that they face management problems; 3 of these companies (response rate 21.4%) cited WEEE and 5 companies (35.7%) cited RoHS as problems, above-average rates for industry as a whole (7.4% and 11.1% respectively). It has become clear that a relatively high percentage of companies that manufacture products targeted by environmental regulations see these regulations as problematic.

With regard to exchange rate fluctuations, the steep rise in local currencies vis-à-vis the euro in 2004 [See Diagram 3-11] has become a headwind for Japanese manufacturing affiliates that export to West European markets, especially the euro zone. 36 companies cited exchange rate fluctuations as a management problem, and the response rate of 66.7% was the highest.

Diagram 3-11: Fluctuations in Major Central and Eastern European Currencies



(Source: International Monetary Fund)

V. EU Enlargement

- 60.4% of Japanese manufacturing affiliates in Central and Eastern Europe thought that EU enlargement had major advantages and 22.6% responded that enlargement had major disadvantages; the difference between these two figures is larger than the last survey (before EU enlargement).
- More than 90% of the companies cited simplified customs procedures as an advantage.
- As disadvantages, more than 70% of the companies pointed to an increase in personnel costs, followed by abolition/reduction of preferential investment systems (41.7%) and stepped up environmental regulations (16.7%).

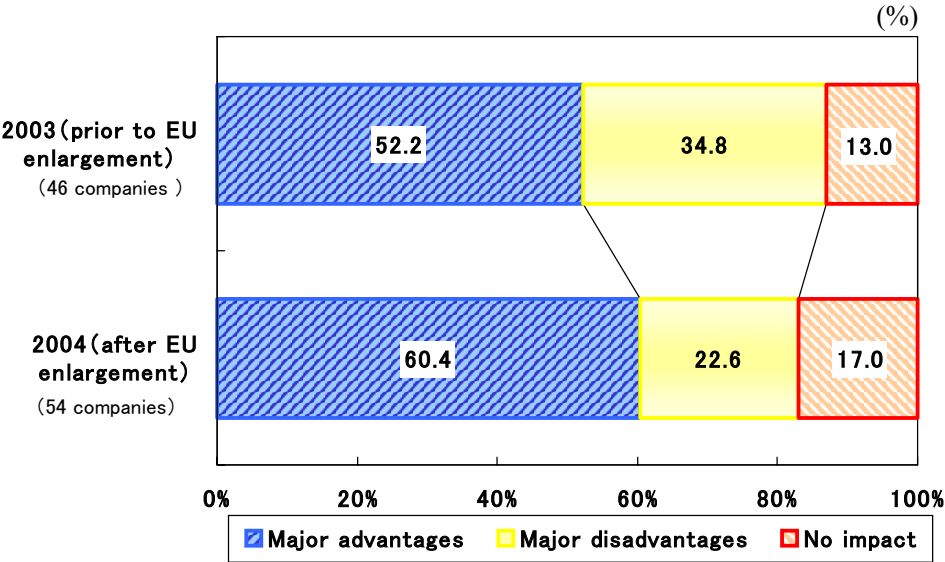
60.4% of Japanese manufacturing affiliates operating in Central and Eastern Europe responded that EU enlargement had major advantages, substantially surpassing the 22.6% of companies that responded that it had major disadvantages. The difference between these two figures is larger than the last survey, indicating that the actual advantages accruing from EU enlargement were greater than anticipated [See Diagram 3-12].

The biggest advantage of EU enlargement was thought to be simplified customs procedures (93.8%), followed by expansion of sales markets (21.9%), harmonization of economic laws and systems (12.5%), harmonization of standards and regulations (12.5%) and expansion of procurement sources (12.5%). Simplified customs procedures was rated as highly as in the last survey (95.8%) prior to the EU enlargement, but the rates for harmonization of economic laws and systems and harmonization of standards and regulations fell considerably from the last survey (58.3% and 37.5% respectively), bringing into sharp relief the fact that systemic improvements have not progressed as far as expected [See Diagram 3-13].

Increased personnel costs (75.0%) continued to be the most cited disadvantage, although personnel costs

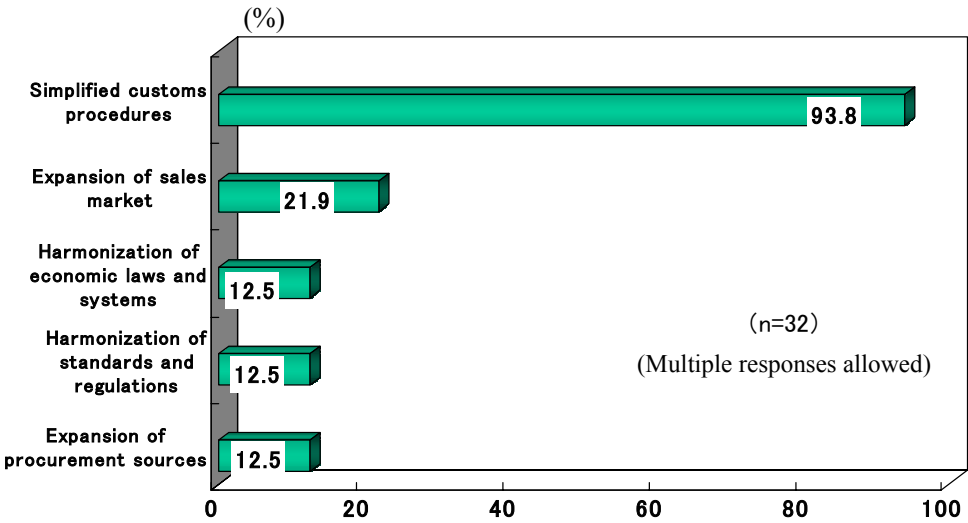
apparently did not climb as sharply as in the last survey (93.8%) or as feared. The percentages of companies pointing to abolition/reduction of preferential investment systems (41.7%) and stepped up environmental regulations (16.7%) were higher than those in the last survey (25.0% and 6.3% respectively), making it clear that the focus at present is on the negative impacts of EU enlargement in terms of regulations/systems and standards [See Diagram 3-14].

Diagram 3-12: Impact of EU Enlargement on Japanese Manufacturing Affiliates in Central and Eastern Europe



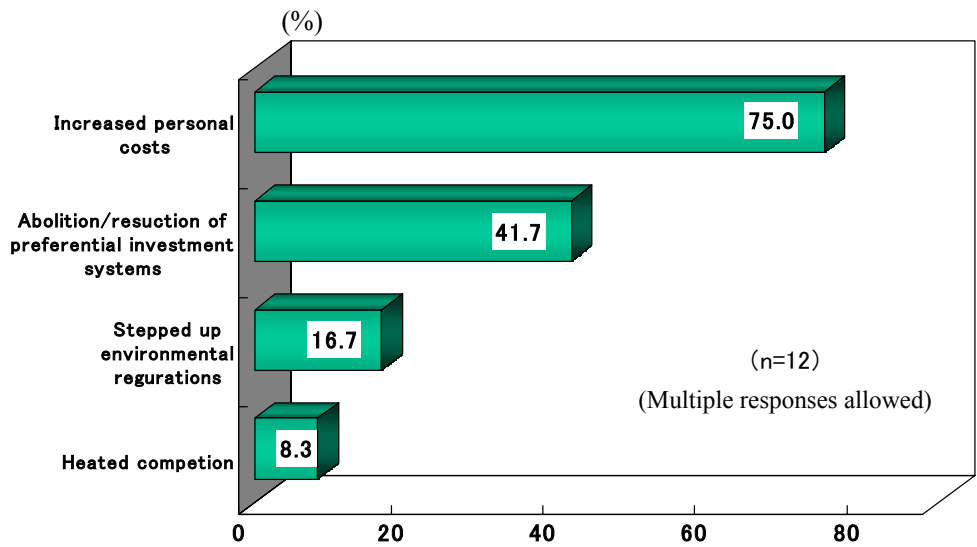
(Source: JETRO Survey, Japan External Trade Organization)

Diagram 3-13: Advantages of EU Enlargement for Japanese Manufacturing Affiliates in Central and Eastern Europe



(Source: JETRO Survey, Japan External Trade Organization)

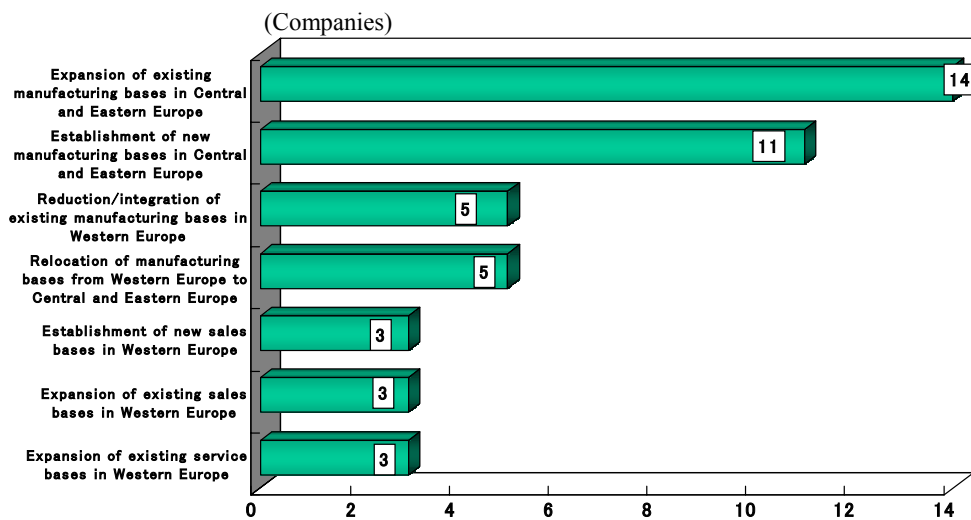
Diagram 3-14: Disadvantages of EU Enlargement for Japanese Manufacturing Affiliates in Central and Eastern Europe



(Source: JETRO Survey, Japan External Trade Organization)

The most common reactions to EU enlargement by Japanese manufacturing affiliates in Central and Eastern Europe were expansion of existing manufacturing bases in Central and Eastern Europe (14 companies, 51.9% of respondent companies), establishment of new manufacturing bases in Central and Eastern Europe (11 companies, 40.7%), reduction/integration of existing facilities in Western Europe and relocation of manufacturing bases from Western Europe to Central and Eastern Europe (5 companies each, 18.5% for both) [See Diagram 3-15].

Diagram 3-15: Reactions to EU Enlargement by Japanese Manufacturing Affiliates in Central and Eastern Europe



(Source: JETRO Survey, Japan External Trade Organization)

Turkey

I. Overview of Japanese Manufacturing Affiliates in Turkey

--- 12 of 15 Japanese manufacturing affiliates are in the automotive or related industries

The latest survey revealed 15 Japanese manufacturing affiliates operating in Turkey (as of the end of 2004). Of these 15 companies, 3 are in the transportation machinery industry and 9 in the transportation machinery parts industry; the Japanese manufacturing affiliates operating in Turkey are primarily in the automotive industry. The remaining 3 companies are in food products and agricultural and fisheries product processing, rubber products and “other” manufacturing.

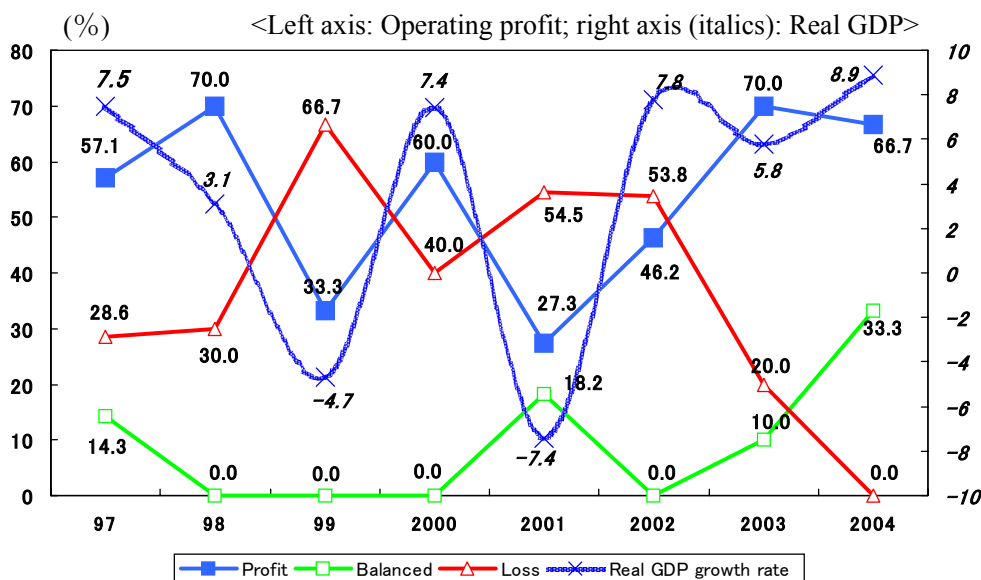
II. Business Conditions and Prospects of Japanese Manufacturing Affiliates in Turkey

- 66.7% of the companies projected operating profits for 2004, 33.3% projected “balanced”, and 0% projected operating losses.
- 44.4% of the companies projected a deterioration in operating profits for 2005

1. No companies reported operating losses in 2004

Of 9 respondent companies, 6 companies projected operating profits for 2004 (down from 7 of 10 respondent companies the previous year) and, for the first time since this survey began, no companies projected losses (as opposed to 2 companies the previous year). 3 companies (1 company the previous year) projected “balanced” [See Diagram 4-1].

Diagram 4-1: Operating Profits for Japanese Manufacturing Affiliates in Turkey



(Source: Operating profit --- JETRO Survey, Japan External Trade Organization
Real GDP growth rate --- Economic and Financial Affairs DG, European Commission)

- (Notes)
- Covers the manufacturing industry only.
 - The number of responses differs by year.

2. Majority of companies project deterioration or “Unchanged” in 2005

4 companies, or 44.4% of the 9 respondent companies, projected deterioration in operating profits in 2005 compared to 2004, 3 companies (33.3%) foresaw “unchanged”, and 2 companies (22.2%) anticipated improvement [See Diagram 4-2].

Turkey’s real GDP growth rate in 2004 was 8.9%, the highest growth rate since the 9.3% level achieved in 1990. Personal consumption and private capital investment increased tremendously, particularly in the first half of 2004, spurring a consumption boom that saw durable consumer goods flying out of stores.

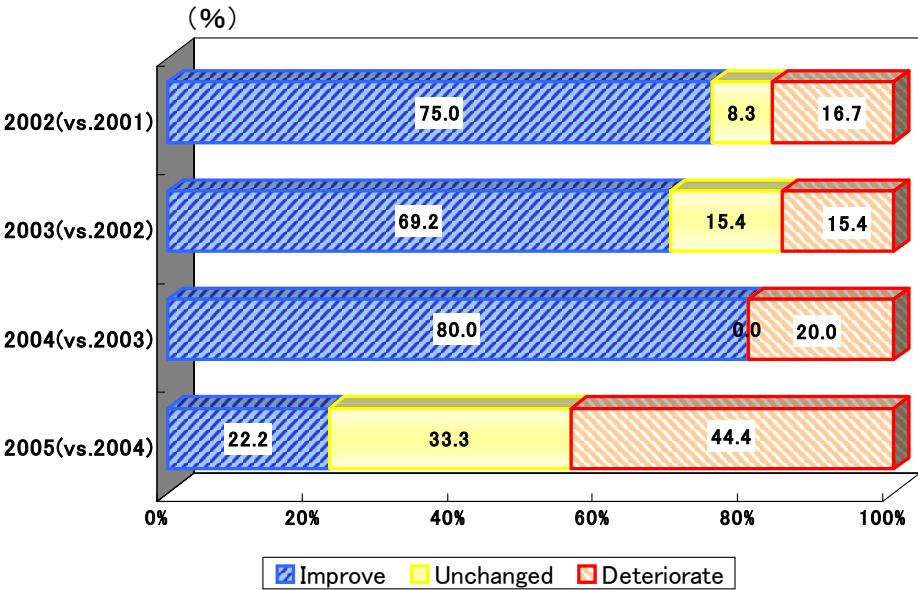
Leading this boom were passenger automobiles, and the auto industry enjoyed an unprecedented prosperity. The number of automobiles sold in Turkey in 2004 reached an all-time high of 753,731 (an 88.2% increase from the previous year). The number of automobiles produced in that year also set a new record high of 823,408 (up 54.4%), of which more than 60% (508,409 vehicles; up 46.2%) were exported (these statistics were provided by Turkey’s Automotive Manufacturers Association [OSD]).

As mentioned earlier, 12 of the 15 Japanese manufacturing affiliates operating in Turkey are in the automotive or related industries, and they recorded strong performances under these circumstances.

However, the economy began to slow down from the latter half of 2004, and the majority of companies do not expect in 2005 to achieve business results on par with those of the preceding year.

Diagram 4-2: Operating Profit Outlook for Japanese Manufacturing Affiliates in Turkey

(Source: JETRO Survey, Japan External Trade Organization)



III. Procurement, Production, and Sales Setups

1. Procurement of materials and parts (excluding parts for production equipment)

- The major procurement sources at present are Japan, the EU15 and the country of location.
- All respondent companies intend to expand procurement from the country of location.

(1) Present procurement sources

--- Japan, the EU15 and the country of location are the three major sources of procurement.

The leading sources for procurement of materials and parts by the 10 Japanese manufacturing affiliates in Turkey are Japan and the EU15, both cited by 9 companies, and the country of location, cited by 6 companies [See Table 4-1].

Table 4-1: Major Procurement Sources (by region/country)

| (Multiple responses allowed) | | | | | |
|------------------------------|------|---------------------|----------------------------|-------|----------------------|
| Japan | EU15 | Country of location | Central and Eastern Europe | Other | Respondent companies |
| 9 | 9 | 6 | 1 | 1 | 10 |

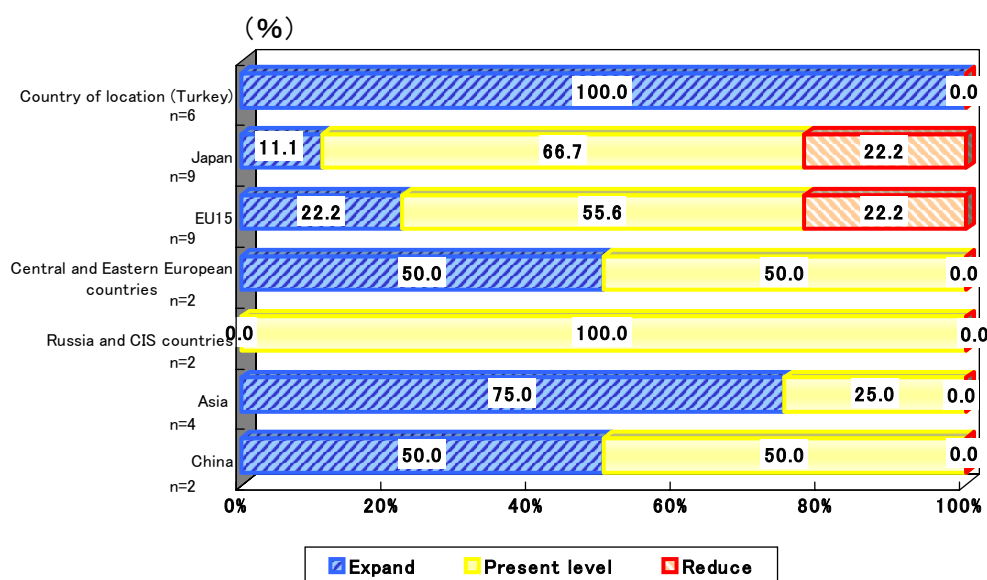
(Source: JETRO Survey, Japan External Trade Organization)

(2) Future procurement policy

--- 100% of companies plan to expand procurement from the country of location.

With regard to procurement from the three major procurement sources – Japan, the EU15, and the country of location – for Japanese manufacturing affiliates in Turkey, 100% of the companies said that they would maintain procurement from Japan and the EU15 at the present levels and would expand procurement from the country of location. 3 companies indicated that they would expand procurement from Asia, pointing to a break from the trend in place through the previous year [See Diagram 4-3].

Diagram 4-3: Future Procurement Policy for Japanese Manufacturing Affiliates in Turkey (by region/country, 2004)



(Source: JETRO Survey, Japan External Trade Organization) (Multiple responses allowed)

2. Sales destinations

- Turkey is increasingly functioning as a base for European markets.
- Companies plan to expand sales to EU15 countries.

(1) Present sales destinations

--- The principal markets are the country of location, the EU15 and Central and Eastern Europe.

The most frequently cited sales destinations for the 9 Japanese manufacturing affiliates in Turkey were the country of location (9 companies), the EU15 (6 companies) and Central and Eastern Europe (3 companies) [See Diagram 4-2].

Japan and China had been among the main sales destinations until last year, but they disappeared from this year's survey. This indicates that Japanese manufacturing affiliates in Turkey are making greater use of Turkey as a base for European markets.

Table 4-2: Sales Destinations (by region/country)

| (Multiple responses allowed) | | | | | |
|------------------------------|------|---------------------|----------------------------|-------|----------------------|
| Japan | EU15 | Country of location | Central and Eastern Europe | Other | Respondent companies |
| 0 | 6 | 9 | 3 | 1 | 9 |

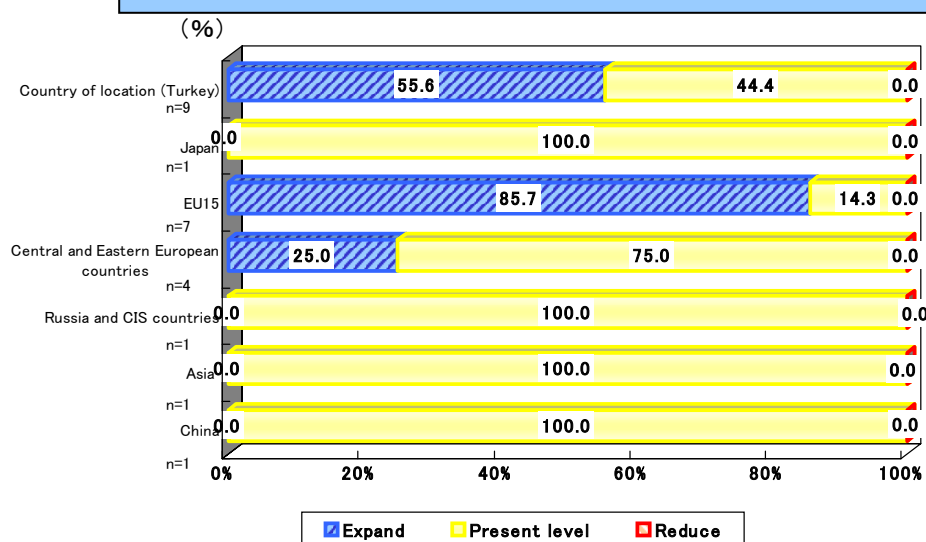
(Source: JETRO Survey, Japan External Trade Organization)

(2) Future sales destinations

--- Companies plan to expand sales in the EU15.

Japanese manufacturing affiliates in Turkey have manifestly declared a policy of expanding sales in the EU15. Of the 7 companies currently engaged in sales in the EU15, 6 companies responded that they would be expanding such sales. 5 of the 9 respondent companies remarked that they would be expanding sales in the country of location, while the remaining 4 said they would be maintaining the present level. The majority of companies said that they would maintain present levels of sales in other regions [See Diagram 4-4].

Diagram 4-4: Future Sales Destinations of Japanese Manufacturing Affiliates in Turkey (by region/country, 2004)



(Source: JETRO Survey, Japan External Trade Organization)

(Multiple responses allowed)

IV. Management Problems

Visa/work permits and CE mark topped management problems due to legislation and system revisions.

Table 4-3: Management Problems (2003)

10 respondent companies

| Category | Problem | Respondent companies |
|--|---|----------------------|
| Finance | Exchange rate fluctuations | 10 |
| Investment legislation/procedures | Frequent legislation revisions | 7 |
| Insufficient infrastructure | Power supply | 6 |
| Materials and parts procurement | Quality | 5 |
| Trade legislation/procedures | Complex administrative procedures | 4 |
| Investment legislation/procedures | Visa/work permits | 4 |
| Tax systems/procedures | Tax rates | 4 |
| Materials and parts procurement | Deliveries | 4 |
| Insufficient infrastructure | Communication | 4 |
| Trade legislation/procedures | Tariff | 3 |
| Investment legislation/procedures | Complex administrative procedures | 3 |
| Tax systems/procedures | Complex procedures | 3 |
| Labor problems | Securing human resources | 3 |
| Insufficient infrastructure | Roads | 3 |
| Standards, certification and regulations | Other | 2 |
| Labor problems | Labor costs | 2 |
| Labor problems | Unions/strikes | 2 |
| Insufficient infrastructure | Transportation other than roads and ports (public institutions) | 2 |
| Trade legislation/procedures | Anti-dumping measures | 1 |
| Trade legislation/procedures | Point-of-origin rules | 1 |
| Tax systems/procedures | Other | 1 |
| Standards, certification and regulations | Animal/plant quarantines | 1 |
| Materials and parts procurement | Costs | 1 |

Table 4-4: Management Problems (2004)

9 respondent companies

| Category | Problem | Respondent companies |
|--|---|----------------------|
| Investment legislation/procedures | Visa/work permits | 8 |
| Finance | Exchange rate fluctuations | 8 |
| Standards, certification and regulations | CE mark | 7 |
| Materials and parts procurement | Quality | 7 |
| Trade legislation/procedures | Complex administrative procedures | 6 |
| Insufficient infrastructure | Roads | 5 |
| Insufficient infrastructure | Power supply | 5 |
| Trade legislation/procedures | Tariff | 4 |
| Tax systems/procedures | Complex procedures | 4 |
| Insufficient infrastructure | Communication | 4 |
| Investment legislation/procedures | Frequent legislation revisions | 3 |
| Investment legislation/procedures | Complex administrative procedures | 3 |
| Materials and parts procurement | Deliveries | 3 |
| Insufficient infrastructure | Other transportation situations (public institutions) | 3 |
| Tax systems/procedures | Other | 2 |
| Labor problems | Securing human resources | 2 |
| Finance | Funds procurement | 2 |
| Insufficient infrastructure | Port facilities | 2 |
| Insufficient infrastructure | Other | 2 |
| Trade legislation/procedures | Anti-dumping measures | 1 |
| Trade legislation/procedures | Other | 1 |
| Tax systems/procedures | Tax rates | 1 |
| Standards, certification and regulations | Other | 1 |
| Labor problems | Labor costs | 1 |
| Labor problems | Quality of workers | 1 |
| Labor problems | Unions/strikes | 1 |
| Labor problems | Social security system | 1 |
| Finance | Other | 1 |
| Materials and parts procurement | Costs | 1 |
| Environmental regulations | WEEE | 1 |
| Environmental regulations | ELV | 1 |
| Environmental regulations | Other | 1 |
| Other | Competition law | 1 |

(Source: JETRO Survey, Japan External Trade Organization)

The most cited management problem in this survey (2004) was visa/work permits (investment legislation/procedures). Only about half of the respondent companies had declared this a problem through the previous survey, but successive revisions of the laws governing work permits for foreign workers from 2003 to 2004 have altered circumstances. Since authority for work permits has been transferred from the Under secretariat of Treasury to the Ministry of Labor and Social Security, more time is required to obtain work permits. The situation had not improved at the time this survey was conducted (February 2005).

Exchange rate fluctuation (finance), as in other years, was a leading problem. The Turkish lira had plummeted against major currencies through 2002, but it began gaining in value from 2003, especially versus the US dollar, and in 2004 the dollar continued to drop as the lira rose. The fluctuations in the exchange rates between the lira and the euro and other major currencies stayed within a narrow range. The rate of consumer price increases for 2004 was 9.3%, the first single-digit figure in 34 years. On January 1, 2005 a redenomination (dropping six zeros from the currency in a million-to-one conversion) was carried out to further stabilize the currency and, if negotiations on EU membership begin as scheduled on October 3, the lira can be expected to rise further. It is highly likely that the exchange rate fluctuation risk will steadily lessen in future.

Not seen at all as a problem until last year, CE mark ranked third as a result of system revisions carried out in 2004. In Notification No. 2004/9 in the Government Notice for February 14, 2004 (No. 25373) and in Notification No. 2004/22 in the Government Notice for April 10, 2004 (No. 24529), the Undersecretariat of Foreign Trade made CE marking obligatory for toys, medical devices, active implantable medical devices, machinery, low-voltage equipment, and a variety of products meeting electromagnetic compatibility (EMC) standards. The documents and inspections required under the CE marking system introduced by Turkey differed from those stipulated by the EU, and the utter chaos that accompanied the start of this system brought customs clearance to a complete halt. Restrictions were eased in Notification No. 2004/29 in the Government Notice for May 4, 2004 (No. 25452), and CE-standard compliance inspections were no longer required for toys, medical equipment, and active medical implant devices imported from the EU. Given that one of the ulterior motives in developing the system was to restrict imports from East Asia, particularly China, reports of customs clearance barriers faced by Japanese companies exporting products to Turkey will no doubt continue to be frequent.

V. EU enlargement and the rise of the euro

- 9 of the companies that responded believed that EU enlargement would have no impact.
- 4 companies reported worse business results due to the stronger euro, 3 companies noted no impact, and 2 companies responded improved business results.

All 9 of the respondent companies said that the enlargement of the EU to a 25-nation framework on May 1, 2004 would have no impact.

A customs union went into effect between Turkey and the EU on January 1996. It is expected that this customs union will be expanded to the 10 new member countries during 2005 as a result of a protocol having been signed. It would seem that all of the companies responded that enlargement would have no impact because it was difficult at the time of this survey to discern this impact (the protocol was ratified on July 29, 2005).

4 of the 9 respondent companies reported negative consequences due to the rise of the euro in 2004, 3 companies noted no impact, and 2 companies responded that stronger euro had contributed to better business results.

The EU15 ranked first as both a sales destination and a procurement source for Japanese manufacturing affiliates in Turkey. Despite its advantages in terms of sales, the stronger euro has led to cost increases in raw materials procurement. The response results likely show that different companies have been impacted in different ways.

Table: Japanese Manufacturing Affiliates Newly Entering Turkey in 2004

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---------|---|-----------------------------|----------------|---|
| Turkey | AISIN OTOMOTIV PARCALARI SANAYI VE TICARET A.S. | Aisin Seiki Co., Ltd. | 2004 | Manufacture of car body parts, such as door frames, door locks, and outside handles |

Appendix

List of Japanese Manufacturing Affiliates in Europe and Turkey

by country

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|-------------------------------|--|--|--|---|
| UK | Accuromm U.K. Ltd. | Fuji Seiko Ltd. | 1988 | Manufacture and sales of plastic precision parts and sales of cutting tools |
| | ACE Coin Equipment Ltd. | Sega Corp. (SGE Holdings, Ltd.) | 1996 | Development, manufacture and sales of game apparatuses |
| | Adel Rootstein Ltd. | Yoshichu Mannequin Co., Ltd. | 1992 | Manufacture and sales of mannequins for displays |
| | Advanced Healthcare Ltd. | Shofu Inc. | 1991 | R&D, manufacture and sales of dental materials |
| | AGC Automotive U.K. Ltd. | Asahi Glass Co., Ltd. | 1990 | Mounting of parts on automotive processed glass, and base warehouse functions |
| | AGM Batteries Ltd. | Japan Storage Battery Co., Ltd. , Mitsubishi Materials Corp. | 1998 | Manufacture and sales of lithium ion batteries |
| | Agrisense Bcs Ltd. | Mitsui & Co., Ltd. | 2001 | Manufacture and sales of pheromone and other information chemicals-related equipment |
| | Air Bearings Ltd. | Hitachi Via Mechanics, Ltd. | 1993 | R&D and manufacture of spindles for processing machines of printed boards |
| | Aisin Europe Manufacturing (UK) Ltd. | Aisin Seiki Co., Ltd. (Aisin Europe S.A.) | 1998 | Manufacture of automotive parts (door frames, etc.) |
| | Algram Group Ltd. | Olympus Corp. (Keymed (Medical & Industrial Equipment) Ltd.) | 1996 | Manufacture and sales of large-sized plastic molded products |
| | Alps Electric (UK) Ltd. | Alps Electric Co., Ltd. | 1984 | Manufacture of automotive electronic products |
| | Amada United Kingdom Limited | Amada Co., Ltd. | 1972 | Sales of industrial machines for sheet metal machining, and manufacture and sales of metal molds |
| | Anritsu Limited | Anritsu Corp. (Anritsu U.S. Holding Inc.) | 1990 | R&D, manufacture and sales of electronic measuring instruments |
| | Aquascutum Group, PLC | Renown Inc. | 1990 | Manufacture and sales of apparel products |
| | Arcontrol Ltd. | Terasaki Electric Co., Ltd. (Terasaki Europe Ltd.) | 2000 | Manufacture and sales of electric machines and apparatuses |
| | ARi Industries (U.K.) Ltd. | Okazaki Manufacturing Company | 1983 | Manufacture of temperature sensors, etc. |
| | Arrk Product Development Group Ltd. | Arrk Corporation | 1988 | Experimentally manufactured products for various industrial development, preparation of CAD/CAM data, experimental manufacture of industrial models, and manufacture of metal molds |
| | Asahi Diamond Industrial U.K. Co.,Ltd. | Asahi Diamond Industrial Co., Ltd. | 1984 | Manufacture and sales of diamond tools |
| | Asahi Glass Fluoropolymers U.K. Ltd. | Asahi Glass Co., Ltd. | 1999 | R&D, Manufacture and sales of PTFE resins |
| | Asahi Seiko (Europe) Ltd. | Asahi Seiko Co., Ltd. | 1994 | R&D and manufacture of currency identification machines, refunding machines, and card refunding read/write machines |
| | Asahi Thermofil (UK) Ltd. | Asahi Kasei Corporation | 2000 | R&D, manufacture and sales of functional resin compound products |
| | Audience Systems Ltd. | Kotobuki Co., Ltd. | 1993 | Design, manufacture and sales of audience chairs |
| | AVX Limited | Kyocera Corp. (AVX Corp.) | 1990 | R&D, manufacture and sales of passive electronic parts |
| BBM Electronics Group Limited | TOA Corporation | 1998 | Manufacture and sales of communication apparatuses (wireless microphones) and peripheral apparatuses | |
| Ben Nevis Distillery Ltd. | Nikka Whisky Distilling Co., Ltd., Mitsui & Co., Ltd., Mitsui & Co. (UK) PLC | 1989 | Brewing and sales of whisky | |
| Bio Signal Corporation Ltd. | Inahata Sangyo Co., Ltd. | 2003 | Manufacture and sales of quality control devices for beer servers | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|--------------------------------|--|---|--|--|
| UK | Biological Crop Protection Ltd. | Mitsui & Co., Ltd. | 1987 | Manufacture of agricultural chemicals |
| | Bristol Bending Sanoh, Ltd. | Sanoh Industrial Co., Ltd., Sojitz Corp. | 1991 | Manufacture of automotive tubes and other plumbing parts |
| | Brother Industries (U.K.) Ltd. | Brother Industries, Ltd. | 1985 | Manufacture of OA apparatuses, such as faxes and electronic typewriters |
| | Calsonic Kansei Europe Technology Center | Calsonic Kansei Corporation | 1989 | R&D and manufacture of heat exchangers for motor vehicles, etc. |
| | Calsonic Kansei UK Limited | Calsonic Kansei Corp. (Calsonic Kansei Europe PLC) | 1989 | Manufacture and sales of automotive parts |
| | Canyon Europe Ltd. | Canyon Corporation | 1986 | Manufacture and sales of plastic hand sprayers |
| | Clan Douglas Limited | Toyo Boshi Kogyo Co., Ltd. | 1992 | Manufacture and sales of cashmere knitwear |
| | Coates Group | Dainippon Ink and Chemicals, Inc. (Sun Chemical Group B.V.) | 2000 | Manufacture and sales of printing inks |
| | Crystal Leisure Ltd. | Sega Corp. (SGE Holdings, Ltd.) | 1996 | Development, manufacture and sales of game equipment |
| | Daido Industrial Bearings Europe Ltd. | Daido Metal Co., Ltd. | 1998 | R&D, manufacture and sales of bearings and bushes for diesel engines, turbo chargers, etc. |
| | Daikin Airconditioning UK Ltd. | Daikin Industries, Ltd. (Daikin Europe N.V.) | 1993 | Manufacture and sales of air conditioners |
| | Daiwa Sports Ltd. | Daiwa Seiko Inc. | 1977 | R&D, manufacture and sales of fishing gears and sporting goods |
| | Denso Manufacturing Midlands Ltd. | Denso Corp. (Denso Manufacturing Italia S.p.A.) | 1999 | Manufacture and sales of starters and alternators |
| | Denso Manufacturing UK Ltd. | Denso Corp. (Denso International (UK) Ltd.) | 1990 | Manufacture of heaters and air conditioners |
| | Denso Marston Ltd. | Denso Corp. (Denso International (UK) Ltd.) | 1989 | Design, manufacture and sales of radiators, oil coolers and intercoolers |
| | Digi Europe Ltd. | Teraoka Seiko Co., Ltd. | 1989 | R&D, manufacture and sales of automatic and non-automatic weighing machines |
| | DP Manufacturing (UK) Ltd. | Mitsubishi Plastics Industries Ltd., Mitsubishi Corp. | 1988 | Processing, manufacture and sales of injection molded products |
| | Dunlop Tyres UK Ltd. | Sumitomo Rubber Industries, Ltd. (Sumitomo Rubber Europe), Sumitomo Electric Industries, Ltd. | 1984 | R&D, manufacture and sales of tire tubes |
| | DuPont Teijin Films U.K. Ltd. | Teijin Ltd. (Teijin Holding U.K. PLC) | 2000 | R&D, manufacture and sales of polyester films |
| | DuPont-Kansai Automotive Coatings (U.K.) Limited | Kansai Paint Co., Ltd., Kansai Paint Europe Ltd. | 1997 | Manufacture and sales of automotive coatings |
| | Dura Cables Ltd. | Nippon Cable System Inc. | 1989 | Design, manufacture and sales of control cables for motor vehicles |
| | Dynic (UK) Ltd. | Dynic Corporation | 1989 | Manufacture and sales of thermal transfer ribbons and care labels |
| | Eadie & Kanai Co., Ltd. | Kanai Juyo Kogyo Co., Ltd. | 1987 | Manufacture of spinning machine parts |
| | Edinburgh Instruments Ltd. | Hamamatsu Photonics K.K. | 1995 | R&D, design, manufacture and sales of optical apparatuses |
| Electronic Harnesses (UK) Ltd. | Onamba Co., Ltd., Sumitomo Electric Industries, Ltd. | 1988 | Manufacture and sales of wire harnesses and wire assemblies | |
| Epson Telford Ltd. | Seiko Epson Corp. (Epson Europe B.V.) | 1987 | Manufacture of ink-jet printers and ink cartridges | |
| F2 Chemicals Ltd. | Asahi Glass Co., Ltd., Mitsubishi Corp. | 1992 | R&D, manufacture and sales of fluorine-based medicine and agrochemical intermediates | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|----------------------------|---|--|--|--|
| UK | FCC (Europe) Ltd. | FCC Co., Ltd., Kanematsu Corp. | 1995 | Manufacture and sales of clutches for two-wheel and four-wheel vehicles |
| | Featherpost Limited | Sansetsu Transportation Co., Ltd. | 1990 | Manufacture and sales of mailing envelopes containing plastic packing materials |
| | Forbo Swift Adhesives Ltd. | Dainippon Ink and Chemicals, Inc. | 1987 | Manufacture and sales of adhesives |
| | Freed of London Ltd. | Chacott Co., Ltd. | 1987 | Manufacture and sales of dancing shoes |
| | Freudenberg Technical Products LP | NOK Corporation | 1989 | Manufacture and sales of oil seals and industrial rubber products |
| | Fuji Copian U.K. Ltd. | Fujicopian Co., Ltd. | 1989 | Manufacture and sales of ink ribbons for printers and typewriters |
| | Fuji Electric (Scotland) Ltd. | Fuji Electric Device Technology Co., Ltd. | 1992 | Manufacture and sales of semiconductor devices |
| | Fuji Seal Europe, Ltd. | Fuji Seal Industries Co., Ltd. | 1986 | Design, manufacture and sales of shrinkable labels, various packaging materials and packaging-related machines |
| | FUJIFILM Electronic Imaging Ltd. | Fuji Photo Film Co., Ltd. | 1997 | R&D, manufacture and sales of printing-related apparatuses |
| | Fujitsu Telecommunications Europe Ltd. | Fujitsu Ltd. | 1991 | R&D, manufacture and sales of communication apparatuses |
| | Futaba-Tenneco U.K. Ltd. | Futaba Industrial Co., Ltd. | 2000 | Manufacture and sales of mufflers and other automotive parts |
| | GKK Plastics Ltd. | Brother Industries, Ltd. (Brother Industries (U.K.) Ltd.) | 1990 | Manufacture of plastic precision molded parts for electronic and electric products |
| | GR Advanced Materials Ltd. | Tohoku Ricoh Co., Ltd., Ricoh Co., Ltd. (Ricoh UK Holdings Ltd.) | 1994 | R&D, manufacture and sales of consumable supplies for printing machines (paper and inks) |
| | Harada Industries (Europe) Ltd. | Harada Industry Co., Ltd. | 1989 | R&D, manufacture and sales of car-mounted antenna systems, cables and actuators |
| | Hashimoto Limited | Hashimoto Forming Industry Co., Ltd. | 1989 | Design, manufacture and sales of automotive parts (resin molded, coated and compound extruded products) |
| | Hi-Lex Cable System Co., Ltd. | Nippon Cable System Inc. | 2000 | Manufacture and sales of control cables and window regulators for motor vehicles |
| | Hirata Corporation of Europe Limited | Hirata Corporation | 1996 | Manufacture and sales of robots and FA facilities |
| | Hitachi Automotive Products Europe, Ltd. | Hitachi, Ltd. (Hitachi Europe Ltd.) | 1997 | Manufacture and sales of engine control parts of motor vehicles |
| | Hitachi Cable UK, Ltd. | Hitachi Cable, Ltd., Hitachi Cable Indiana, Inc. | 2000 | Manufacture and sales of power steering hoses and brake hoses |
| | Hochiki Europe (U.K.) Limited | Hochiki Co., Ltd. | 1992 | Manufacture and sales of fire alarms |
| | Honda Connectors Limited | Honda Tsushin Kogyo Co., Ltd. (Honda Connectors, Inc.) | 1986 | Assembling of cables and manufacture of connectors |
| | Honda Engineering Europe Ltd. | Honda Engineering Co., Ltd. | 1990 | Design and manufacture of production facilities and metal molds |
| | Honda of the UK Manufacturing Ltd. | Honda Motor Co., Ltd. (Honda Motor Europe Ltd.) | 1986 | Manufacture of four-wheel vehicles |
| | Horiba Instruments Limited | Horiba, Ltd. | 1977 | Manufacture and sales of auto emission measuring systems and environmental pollution monitoring systems |
| Horiba Jobin Yvon IBH Ltd. | Horiba, Ltd. | 2003 | Design and manufacture of fluorescent life measuring devices | |
| Hoshizaki Europe Ltd. | Hoshizaki Electric Co., Ltd. (Hoshizaki Europe Holdings B.V.) | 1994 | Manufacture of full automatic ice makers | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|------------------------|---|--|--|---|
| UK | Hosiden Besson Ltd. | Hosiden Corp. (Hosiden Europe GmbH) | 1990 | R&D, design, manufacture and sales of mobile communication-related products, hand sets, test phones and network-related parts |
| | Hosokawa Micron Ltd. | Hosokawa Micron Corporation | 1985 | Manufacturing, sales and processing on contract of powder process apparatuses and clean rooms |
| | Hoya Lens U.K. Limited | Hoya Corp. (Hoya Holdings N.V.) | 1980 | Manufacture and sales of lenses for glasses |
| | Hunting Oilfield Services (UK) Ltd. | Marubeni-Itochu Steel Inc. (Marubeni-Itochu Tubulars Europe PLC) | 1992 | Processing of screw cutters for steel pipes for oil drilling |
| | IK Precision Company Ltd. | Inahata Sangyo Co., Ltd., I & P Co., Ltd. | 1989 | Molding and sales of metal and plastic parts |
| | Image Polymers Europe UK Partnership | Mitsui Chemicals, Inc. (MCI Great Britain Ltd.) | 1996 | Manufacture and sales of toner binders |
| | Ishida Europe Ltd. | Ishida Co., Ltd. | 1985 | R&D, manufacture and sales of industrial apparatuses, such as testing devices, measuring/packaging apparatuses |
| | Itron (UK) Limited | Noritake Co., Ltd. | 1997 | Manufacture and sales of VFD modules and allied control systems |
| | J&W Hardie Ltd. | Takara Shuzo Co., Ltd. (The Tomatin Distillery Co., Ltd.) | 1996 | Manufacture and sales of Scotch whisky |
| | John Laing of Hawick Ltd. | KFC, Ltd. | 1990 | Manufacture and sales of cashmere knitwear |
| | JPM International Ltd. | Sega Corp. (SGE Holdings, Ltd.) | 1996 | Development, manufacture and sales of game equipment |
| | JVC Manufacturing U.K. Ltd. | Victor Company of Japan, Limited | 1988 | Manufacture and sales of TV sets |
| | Katmex Ltd. | Katsushiro Matex Co., Ltd., Komatsu Ltd. (Komatsu Europe International N.V.) | 1999 | Manufacture of construction and industrial machine parts |
| | Kato Precision (U.K.) Limited | Advanex Inc. | 1989 | Design, manufacture and sales of precision springs |
| | Kato-Entex Limited | Advanex Inc. (Kato Precision (U.K.) Limited) | 1993 | Design and manufacture of precision springs and allied products |
| | Kawasaki Precision Machinery (UK) Ltd. | Kawasaki Precision Machinery Ltd. | 1993 | Design, manufacture and sales of hydraulic pumps, motors, valves, etc. |
| | Keihin Europe Ltd. | Keihin Corporation | 1996 | Manufacture and sales of and collection of information on parts for two-wheel and four-wheel vehicles |
| | Kemble & Co., Ltd. | Yamaha Co., Ltd. | 1986 | Manufacture and sales of pianos |
| | KeyMed (Medical & Industrial Equipment) Limited | Olympus Corp. (Olympus KeyMed Group Ltd.) | 1970 | R&D, manufacture, sales and marketing of industrial hard mirrors |
| | Kiyokuni Europe Limited | Kiyokuni Industry Co., Ltd. | 1987 | Design and manufacture of metal molds for OA apparatuses and manufacture of pressed products |
| | Koito Aerospace Europe Ltd. | Koito Industries, Ltd. | 2003 | Manufacture and sales of aircraft seats |
| | Koito Europe Limited | Koito Manufacturing Co., Ltd. | 1999 | Manufacture and sales of lighting fixtures for motor vehicles |
| | Komatsu U.K. Ltd. | Komatsu Europe International N.V. | 1985 | R&D, design, manufacture and sales of hydraulic excavators |
| | Koyo Bearings (Europe) Ltd. | Koyo Seiko Co., Ltd. | 1990 | Manufacture of ball bearings and roller bearings |
| Kratos Analytical Ltd. | Shimadzu Corporation | 1989 | Manufacture and sales of measuring instruments | |
| Krehalon U.K. Ltd. | Kureha Chemical Industry Co., Ltd. (Kureha Europe B.V.) | 1993 | Processing and sales of food packaging materials | |
| Kuretake U.K. Limited | Kuretake Co., Ltd. | 1986 | Manufacture and sales of stationery | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|--------------------------------|--|--|---|--|
| UK | KVC (UK) Ltd. | KVC Co., Ltd. | 2000 | Manufacture of ball valves |
| | Kyoshin Europe Ltd. | Kyoshinshoji Corporation | 1998 | Manufacture and sales of insulation materials, sealing materials and gaskets for motor vehicles |
| | Magna Kansei Limited | Calsonic Kansei Corp. (Calsonic Kansei Europe PLC) | 1996 | R&D, design and manufacture of resin products for motor vehicles, such as cockpit modules |
| | Magnetto-Topy Wheels (UK) Limited | Topy Industries, Ltd. (Topy International (Europe) B.V.) | 1987 | Design, manufacture and sales of automotive wheels |
| | Makita Manufacturing Europe Ltd. | Makita Corp. (Makita International Europe Ltd.) | 1989 | Manufacture of power tools |
| | Markon Sawafuji Ltd. | Sawafuji Electric Co., Ltd. | 2001 | Manufacture and sales of electrified bodies for general-purpose generators |
| | Marubeni Oil & Gas (U.K.) Ltd. (London) | Marubeni Corporation | 2000 | Prospecting, development, manufacture and sales of crude oil and natural gas in the British North Sea |
| | Matsushita Electric (U.K.) Ltd. | Matsushita Electric Industrial Co., Ltd. (Matsushita Electric Europe (Headquarters) Ltd.) | 1974 | R&D and manufacture of notebook PCs and microwave ovens |
| | Matsushita Electronic Components (U.K.) Ltd. | Matsushita Electronics Components Co., Ltd., Matsushita Electric Industrial Co., Ltd. | 1988 | Design and manufacture of car-mounted speakers, etc. |
| | Matsushita Electronic Magnetron Corp. (U.K.) Ltd. | Matsushita Electric Instrument Corporation | 1990 | Manufacture and sales of magnetrons for microwave ovens and industrial machines |
| | Maxell Europe Ltd. | Hitachi Maxell Co., Ltd. | 1980 | Manufacture and sales of audio and video products |
| | Meiki (UK) Ltd. | Meiki & Company, Ltd. | 1989 | Design, manufacture and repairing of metal molds for plastic products |
| | Meritor Suspension Systems Co. Ltd. | Mitsubishi Steel Mfg. Co., Ltd. (MSM Canada, Inc.) | 2000 | Manufacture and sales of stabilizers (antiroll springs), automotive engine valve springs, and springs for general industrial use |
| | Minova Ltd. | Miyuki Holdings Co., Ltd. | 1979 | Manufacture and sales of woolen fabrics |
| | Miracle Engineering Europe Ltd. | Mitsubishi Materials Kobe Tools Corporation | 2001 | Manufacture, sales and regrinding of end mills |
| | Mitsubishi Electric Air Conditioning Systems Europe Ltd. | Mitsubishi Electric Corporation | 1999 | Manufacture and sales of air conditioners for offices and stores |
| | Mitsui Babcock Energy Ltd. | Mitsui Engineering & Shipbuilding Co., Ltd. | 1995 | R&D, manufacture and sales of boilers, etc. |
| | Mitsui Components Europe Ltd. | Mitsui Mining & Smelting Co., Ltd. (Mitsui Mining & Smelting (Netherlands) B.V.), Mitsui & Co., Ltd., Mitsui & Co., UK PLC | 1999 | Manufacture and sales of functional parts for motor vehicles |
| | Mitsumi UK Ltd. | Mitsumi Electric Co., Ltd. | 1987 | Design, manufacture and sales of tuners for radios, TVs and videos |
| | Mizuno Corporation (U.K.) | Mizuno Corporation | 1982 | Manufacture and sales of golfing kits and sales of sports equipment |
| | Morrison Bowmore Distillers Ltd. | Suntory Ltd. | 1989 | Manufacture and sales of Scotch whisky |
| | Murata Manufacturing (UK) Limited | Murata Mfg. Co., Ltd. (Murata Electronics (UK) Ltd.) | 1989 | Manufacture of capacitors |
| | Musashi Auto Parts UK Ltd. | Musashi Seimitsu Industry Co., Ltd. | 1993 | Manufacture and sales of transmission and suspension parts for four-wheel vehicles |
| Nagata Seiki Company (UK) Ltd. | Nagata Seiki Co., Ltd. | 1995 | Manufacture of socks knitting machines | |
| Nakano Europe Ltd. | Mitsukan Group Corporation | 1998 | Manufacture and sales of vinegar and white liquor | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|--------------------|--|---|--|---|
| UK | Namco Europe Ltd. | Namco Ltd. | 1991 | Manufacture and sales of amusement apparatuses and distribution of contents to cellular phones |
| | NEC Computers Scotland Ltd. | NEC Corporation | 1981 | R&D and manufacture of PCs |
| | NGF Europe Ltd. | Nippon Sheet Glass Co., Ltd. | 1991 | R&D, manufacture and sales of glass cords for rubber reinforcement |
| | NGK Berylco U.K. Ltd. | NGK Insulators, Ltd. (NGK North America, Inc.) | 1986 | Processing and sales of beryllium copper products |
| | Nicera European Works Ltd. | Nippon Ceramic Co., Ltd. | 1994 | Manufacture and sales of infrared sensors |
| | Nichirin U.K. Ltd. | Nichirin Co., Ltd. | 1999 | Manufacture and sales of hoses for motor vehicles |
| | Nifco U.K. Ltd. | Nifco Inc., Marubeni Corp. | 1990 | Manufacture and sales of industrial clamps and precision molded plastic products |
| | Nikon Optical U.K. Limited | Nikon-Essilor Co., Ltd. | 1998 | Surface processing and sales of lenses for glasses |
| | Nippon Electric Glass (UK) Limited | Nippon Electric Glass Co., Ltd. | 1997 | Manufacture and sales of glass for cathode ray tubes |
| | Nippon Gohsei UK Ltd. | Nippon Synthetic Chemical Industry Co., Ltd. | 2001 | Manufacture and sales of Soanol (ethylene-vinyl alcohol copolymer/EVOH) |
| | Nippon Oil Exploration and Production U.K. Limited | Nippon Oil Exploration Limited | 1996 | Prospecting, development and manufacture of petroleum and natural gas in the British North Sea |
| | Nissan Motor Manufacturing (U.K.) Ltd. | Nissan Motor Co., Ltd. | 1984 | Manufacture of motor vehicles and automotive parts |
| | Nissin Showa UK Ltd. | Showa Corp., Nissin Kogyo Co., Ltd. | 1995 | Manufacture and sales of power steering and shock absorbers for four-wheel vehicles |
| | Nittan (U.K.) Ltd. | Nittan Co., Ltd. | 1972 | Manufacture and sales of disaster prevention apparatuses |
| | NMB Minebea UK Ltd. | Minebea Co., Ltd. | 2003 | Manufacture and sales of bearings |
| | Nobel Enterprises, Ltd. | Inahata Sangyo Co., Ltd. | 2002 | Manufacture of materials for inks, paints and cosmetics |
| | NP Automotive Coatings (Europe) Ltd. | Nippon Paint Co., Ltd. (Nippon Paint (Europe) Ltd.) | 1995 | Manufacture and sales of coating materials for motor vehicles |
| | NPL Technologies Limited | Arrk Corp. (Arrk Product Development Group) | 2004 | Manufacture of models, experimental products and metal molds for the automotive and aircraft industries |
| | NSK Bearings Europe Ltd. | NSK Ltd. (NSK Europe Ltd.) | 1974 | Manufacture of bearings |
| | NSK Steering Systems Europe Ltd. | NSK Ltd. | 1999 | Manufacture and sales of automotive parts |
| | NSK-AKS Precision Ball Europe Ltd. | NSK Ltd., Amatsuji Steel Ball Mfg. Co., Ltd. | 1989 | Manufacture of steel balls for bearings |
| | NSUK Limited | Nakagawa Sangyo | 1988 | Manufacture and sales of heat insulating materials and sound deadening materials |
| | Obara Europe Ltd. | Obara Corporation | 1994 | Manufacture and sales of resistance welding apparatuses |
| | Ogihara Europe Limited | Marubeni Corp., Ogihara Corp., Ogihara America Corp., Marubeni Europe PLC | 1994 | Manufacture and sales of pressed parts and metal molds for car bodies |
| Oji InterTech Ltd. | Oji International Packaging K.K. | 1988 | Manufacture and sales of F10 materials (ceiling and membrane materials for motor vehicles) | |
| Oki (UK) Ltd. | Oki Electric Industry Co., Ltd. (Oki Europe Ltd.) | 1987 | Design, manufacture and sales of printers, faxes and electronic apparatuses for motor vehicles | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---|--|--|---|---|
| UK | OMRON Automotive Electronics UK Ltd. | OMRON Corp. (OMRON Management Centre of Europe B.V.) | 1987 | Manufacture and sales of car-mounted electric equipment parts |
| | OMRON Electronic Components Ltd. | OMRON Corp. (OMRON Europe B.V.) | 1988 | Manufacture and sales of information apparatuses |
| | Orion Electric (U.K.) Ltd. | Orion Electric Co., Ltd. | 1986 | Manufacture of color TVs, VCRs and DVD players |
| | OSG U.K. Limited | OSG Corp. (OSG Europe Ltd.) | 1999 | Manufacture and sales of precision cutting tools |
| | Panasonic Communications Company (U.K.) Ltd. | Matsushita Electric Industrial Co., Ltd. | 1986 | Manufacture of PBXs (private branch exchanges) and DECTs (European-type cordless telephones) and R&D of models exclusively for respective countries based on basic models |
| | Pilkington PLC | Nippon Sheet Glass Co., Ltd. | 2000 | Manufacture and sales of glass for buildings and motor vehicles |
| | Piolax Manufacturing Ltd. | Piolax Inc. | 2003 | Design and manufacture of industrial fasteners and precision springs for motor vehicles |
| | Pioneer Technology (UK) Ltd. | Pioneer Corp. (Pioneer GB Ltd.) | 1990 | R&D and manufacture of acoustic and video products |
| | Precision Technologies International Ltd. | TSUDAKOMA Corporation | 2004 | Manufacture of multispindle head units for processing automotive parts and measuring table systems for turbines for aircraft and generators |
| | Princes Ltd. | Mitsubishi Corp., Mitsubishi Corporation (UK) PLC | 1989 | Manufacture and sales of foods and drinks |
| | Reichhold Group | Dainippon Ink and Chemicals, Inc. | 1987 | Manufacture and sales of synthetic resin |
| | Ricoh UK Products Ltd. | Ricoh Co., Ltd. (Ricoh UK Holdings Ltd.) | 1983 | Manufacture of copiers, toners and photosensitive bodies |
| | Robertson Geologging Ltd. | Oyo Corp. (Oyo Corp., U.S.A.) | 1992 | Manufacture and sales of small-caliber logging equipment |
| | R-Tek Ltd. | Kasai Kogyo Co., Ltd. | 1991 | Manufacture and sales of interior parts for motor vehicles |
| | Ryobi Aluminium Casting (UK), Ltd. | Ryobi, Ltd. | 1990 | Design, manufacture and sales of diecast products |
| | Sakata Ornamentals UK Ltd. | Sakata Seed Corp. (European Sakata Holding S.A.S.) | 1998 | Manufacture and sales of seeds and seedlings |
| | Sanken Power Systems (UK) Limited | Sanken Electric Co., Ltd. | 1989 | Design, manufacture and sales of switch-mode power supplies and motor control modules |
| | Sanko Gosei UK Ltd. | Sanko Gosei Ltd. | 1988 | Design and manufacture of metal molds for plastic molding, and design and molding of plastic molded articles |
| | Sansetsu UK Limited | Sansetsu Transportation Co., Ltd. | 1978 | Design, manufacture and sales of plastic packing materials |
| | Sanyo Energy (UK) Co., Ltd. | Sanyo Electric Co., Ltd. | 1991 | Manufacture and sales of batteries |
| | Sanyo Gallenkamp PLC | Sanyo Electric Co., Ltd. | 1990 | R&D, manufacture and sales of centrifugal machines, incubators, etc. |
| | Sanyo Industries (UK) Ltd. | Sanyo Electric Co., Ltd. | 1982 | Design and manufacture of color TVs |
| | Satake Corporation UK Division | Satake Corporation | 1998 | R&D, manufacture and sales of rice/flour milling machines |
| | Sato UK Ltd. | Sato Corp. (Barcode Sato International Pte. Ltd.) | 2000 | Sales of electronic printers and hand labeling machines and manufacture and sales of consumable supplies |
| Sega Amusements Europe Ltd. | Sega Corp. (Sega Europe Ltd.) | 1991 | Manufacture and sales of commercial amusement apparatuses | |
| SEI Interconnect Products (Europe) Ltd. | Sumitomo Electric Industries, Ltd. (SEI (UK) Holding Ltd.) | 1999 | Manufacture and sales of electronic wiring products | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---------------------------|--|---|---|---|
| UK | Sekisui (U.K.) Ltd. | Sekisui Chemical Co., Ltd. (Sekisui Europe B.V.) | 1975 | R&D and manufacture of polyolefin foams |
| | Senju Manufacturing (Europe) Ltd. | Senju Metal Industry Co., Ltd. | 1996 | Manufacture and sales of solder pastes |
| | Sharp Manufacturing Company of U.K. | Sharp Corporation | 1985 | Manufacture of video cassette recorders, microwave ovens and solar cell modules |
| | Sharp Precision Manufacturing (U.K.) Ltd. | Sharp Corp., Sharp Manufacturing Systems Corp. | 1988 | Manufacture and sales of precision press parts and precision engineering plastic parts |
| | Shin-Etsu Handotai Europe Ltd. | Shinetsu Handotai Co., Ltd. | 1984 | Manufacture and sales of semiconductor silicon |
| | Shoda Sauces Europe Company Limited | Shoda Soy Sauce Co., Ltd. | 2004 | Manufacture of authentically brewed soy sauce |
| | Silicon Sensing Systems, Ltd. | Sumitomo Precision Products Co., Ltd. | 1999 | Manufacture and sales of motion sensors |
| | SMC Pneumatics (U.K.) Ltd. | SMC Corporation | 1979 | R&D, manufacture and sales of pneumatic apparatuses |
| | SMK (U.K.) Ltd. | SMK Corporation | 1988 | Design, manufacture and sales of remote control units, control panels and AC chargers |
| | Sony Broadcast Ltd. | Sony Corporation | 1978 | R&D and manufacture of broadcasting equipment (video cameras, TVs, etc.) |
| | Sony United Kingdom Ltd. | Sony Corp. (Sony Europe Holding B.V.) | 1968 | R&D and manufacture of color TVs, display monitors, semiconductors and allied parts |
| | Southern Glass House Produce Ltd. | Kirin Brewery Co., Ltd. (Kirin Agribio EC B.V.) | 1992 | Sales of chrysanthemum seedlings and manufacture and sales of cut flowers |
| | SumiAgro (UK) Ltd. | Sumitomo Corporation | 2000 | R&D, manufacture and sales of agricultural chemicals for agricultural and non-agricultural land |
| | Sumitomo (SHI) Cyclo Drive Europe, Ltd. | Sumitomo Heavy Industries, Ltd. | 1996 | Manufacture and sales of machine power transmission units and electric apparatuses |
| | Sumitomo Electric Wiring Systems (Europe) Ltd. | Sumitomo Electric Industries, Ltd., Sumitomo Wiring Systems, Ltd., Sumitomo Wiring Systems Europe, Ltd. | 1999 | Manufacture and sales of wire harnesses for motor vehicles and allied products |
| | Sun Chemical Gibbon | Dainippon Ink and Chemicals, Inc. | 1998 | Manufacture and sales of printing inks |
| | Sun Chemical Ltd. | Dainippon Ink and Chemicals, Inc. | 1986 | Manufacture and sales of printing inks, pigments and printing materials |
| | Surface Technology Systems PLC | Sumitomo Precision Products Co., Ltd. | 1995 | R&D, manufacture and sales of plasma process units |
| | Synthomer Ltd. | Dainippon Ink and Chemicals, Inc. (Reichhold Group) | 1987 | R&D and manufacture of carpets, construction materials, latexes, etc. |
| | Takao Europe Manufacturing Ltd. | Takao Kinzoku Kogyo Co., Ltd. | 2000 | Manufacture of automotive parts |
| | Tamura Kaken (U.K.) Ltd. | Tamura Kaken Co., Ltd. | 1980 | Manufacture and sales of printed wiring board materials |
| | Tenma (U.K.) Ltd. | Tenma Corp., Sumitomo Corp., Sumitomo Corporation Europe PLC | 1988 | Plastic injection molding and coating |
| | Tennants Inks & Coating Supplies Ltd. | Dainippon Ink and Chemicals, Inc. | 1922 | Manufacture of printing inks |
| Terasaki (Europe) Ltd. | Terasaki Electric Co., Ltd. | 1972 | R&D, manufacture and sales of electric circuit breakers, etc. | |
| Terumo UK Ltd. | Terumo Corp. (Terumo Europe N.V.) | 1995 | Manufacture and sales of medical apparatuses | |
| The Inx Group (U.K.) Ltd. | Sakata Inx Corp. (The Inx Group Ltd.) | 1992 | Manufacture and sales of printing inks | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---|--|--|--|--|
| UK | The Mentholatum Co., Ltd. | Rohto Pharmaceutical Co., Ltd. (Mentholatum Co., Inc.) | 1988 | Manufacture and sales of medicines |
| | The New Zipper Company Ltd. | YKK Corp. (YKK (U.K.) Ltd.) | 1983 | Manufacture and sales of fasteners |
| | The Tomatin Distillery Co., Ltd. | Takara Shuzo Co., Ltd. | 1986 | Manufacture and sales of Scotch whisky |
| | Tomen Foods U.K. Ltd. | Tomen Corp., Tomen (U.K.) PLC | 1997 | Manufacture and sales of Japanese foods |
| | Tomoe Tritec, Ltd. | Tomoe Valve Co., Ltd. (Tomoe Valve UK Ltd.) | 1997 | Design, manufacture and sales of triple decentering process valves, etc. |
| | Toray Textiles Europe Ltd. | Toray Industries, Inc., Hosokawa Kigyo Co., Ltd., Komatsu Seiren Co., Ltd. | 1989 | Manufacture and sales of synthetic fiber textiles |
| | Toshiba Carrier UK Ltd. | Toshiba Corporation | 1990 | Manufacture and sales of air conditioners |
| | Toshiba Information Systems (UK) Ltd. | Toshiba Corp., Toshiba Europe GmbH | 1986 | Manufacture of color TVs and air conditioners, and R&D relating to digital TVs |
| | TOSOH Quartz Ltd. | Tosoh Corp. (Tosoh America, Inc.) | 1992 | Processing and sales of quartz glass products |
| | Toyo Seal Industries Co., Ltd. UK | Toyo Seal Industries Co., Ltd. | 1998 | Manufacture and sales of rubber seals for roller bearings |
| | Toyoda Gosei Fluid Systems UK Ltd. | Toyoda Gosei Co., Ltd. | 2000 | Manufacture and sales of functional automotive parts |
| | Toyoda Gosei UK Ltd. | Toyoda Gosei Co., Ltd., Toyota Tsusho Corp. | 1999 | Manufacture and sales of body sealing products for motor vehicles |
| | Toyoda-Koki Automotive UK Ltd. | Toyoda Machine, Ltd. | 1997 | Design, manufacture and sales of power steering pumps |
| | Toyota Motor Manufacturing (UK) Ltd. | Toyota Motor Corporation | 1992 | Manufacture of passenger cars (AVENSIS, COROLLA) and engines |
| | TP Moulding Ltd. | Shimizu Industry Co., Ltd. | 2000 | Manufacture of molded resin articles (automotive parts) |
| | Traltec (UK) Ltd. | Shimizu Industry Co., Ltd. | 1995 | Manufacture of car air conditioners, radiator parts, etc. |
| | TRB Limited | Tokai Rika Co., Ltd. | 1998 | Manufacture and sales of automotive parts, mainly switches |
| | TS Tech UK Ltd. | TS Tech Co., Ltd. | 1999 | Manufacture of automotive parts |
| | Tsubakimoto U.K., Ltd. | Tsubakimoto Chain Co. (Tsubakimoto Europe B.V.) | 1990 | Manufacture and sales of roller chains and electric units |
| | TT Assembly Systems (UK) Limited | Toyota Tsusho Corporation | 2003 | Assembling of tires and wheels |
| | TYK Limited | TYK Corporation | 1988 | Manufacture and sales of fire-resistant materials |
| | UK-NSI Co., Ltd. | Nippon Seiki Co., Ltd. | 1988 | Manufacture of meters for two-wheel and four-wheel vehicles |
| | Union Chemicar U.K. Ltd. | Union Chemicar Co., Ltd. | 1989 | Manufacture and sales of ink ribbon cassettes and ink ribbons for Faxes |
| | Unipart Yachiyo Technology (UYT) Ltd. | Honda Motor Co., Ltd., Yachiyo Industry Co., Ltd., Hirata Technical Co., Ltd., Honda Trading Corp. | 1996 | Manufacture and sales of automotive parts (sun roofs, white bodies, etc.) |
| Unipart Yanagawa Engineering (UYE) Ltd. | Honda Motor Co., Ltd., Honda Trading Corp., Yanagawa Seiki Co., Ltd. | 1996 | Manufacture of transmission parts | |
| Unipart Yutaka Systems (UYS) Ltd. | Yutaka Giken Co., Ltd., Honda Motor Co., Ltd., Honda Trading Corp. | 1998 | Manufacture of parts for four-wheel vehicles | |
| Unipres (UK) Limited | Unipress Corporation | 1987 | Manufacture of body parts for motor vehicles | |

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|---------|---|---|----------------|---|
| UK | Universal Drilling & Cutting Equipment Ltd. | Nitto Kohki Co., Ltd. (Nitto Kohki Europe Co., Ltd.) | 2002 | Manufacture and sales of portable magnetic drills and blades for these drills |
| | Usher-Walker Group Ltd. | Dainippon Ink and Chemicals, Inc. (Sun Chemical Group B.V.) | 1993 | R&D, manufacture and sales of printing inks |
| | Vascutek Ltd. | Terumo Corp. (Terumo Europe N.V.) | 2002 | R&D, manufacture and sales of artificial blood vessels |
| | Yajima (UK) Limited | Metaltech Ltd., Yajima Giken, Inc. | 1997 | Manufacture of frames for cathode ray tube, various automated machines and units, and automotive and other industrial parts |
| | Yamada Europe Co., Ltd. | Yamada Corporation | 1996 | Manufacture of functional parts for four-wheel vehicles |
| | Yamazaki Mazak U.K. Ltd. | Yamazaki Mazak Corporation | 1980 | Design, manufacture and sales of machine tools |
| | Yaskawa Electric UK Ltd. | Yaskawa Electric Corporation | 1993 | Manufacture and sales of inverters |
| | YKK (U.K.) Ltd. | YKK Corp. (YKK Holding Europe B.V.) | 1966 | R&D, manufacture and sales of fasteners |
| | Yuasa Automotive Batteries (Europe) Ltd. | Yuasa Corporation | 1988 | Manufacture and sales of batteries for motor vehicles |
| | Yuasa Battery (UK) Ltd. | Yuasa Corporation | 1981 | Design, manufacture and sales of gastight lead accumulators |
| | Zeon Chemicals Europe Ltd. | Nippon Zeon Co., Ltd. | 1989 | Manufacture and sales of synthetic rubber |
| | Zuken Ltd. | ZUKEN Inc. (Zuken Group Ltd.) | 1994 | R&D, manufacture and sales of CAE/CAD/CAM systems |
| France | ABX S.A. | Horiba, Ltd. | 1996 | R&D, manufacture and sales of hemocytometers |
| | Adeka Palmarole S.A.S | Asahi Denka Co., Ltd. | 2000 | R&D, manufacture and sales of resin additives, stabilizers and plasticizers |
| | Aisan Bitron Europe | Aisan Industry Co., Ltd. | 2000 | Manufacture of automotive fuel pump modules |
| | Ajinomoto Euro-Aspartame S.A. | Ajinomoto Co., Inc. | 1991 | R&D and manufacture of aspartame (high-sweetness sweetener) |
| | AJINOMOTO EUROLYSINE S.A. | Ajinomoto Co., Inc. | 1974 | R&D, manufacture and sales of feed additives (lysine, threonine and tryptophane) |
| | Akebono Arras S.A. | Akebono Brake Industry Co., Ltd. (Akebono Europe S.A.) | 1998 | Manufacture of brake pads for motor vehicles |
| | Akzo Nobel Nippon Paint S.A. | Nippon Paint Co., Ltd. | 1996 | Manufacture and sales of coating materials for coil coating |
| | Amada Europe S.A. | Amada Co., Ltd., Amada Machinics, Ltd. | 1986 | R&D and manufacture of press brakes, shearing machines and punching machines |
| | Amada Outillage S.A. | Amada Co., Ltd. | 1992 | Manufacture and sales of metal molds |
| | Ammann-Yanmar S.A. | Yanmar Diesel Engine Co., Ltd., Seirei Industry Co., Ltd. | 1989 | R&D, manufacture and sales of small civil engineering and construction machines |
| | Arysta Life Science Europe S.A. | Tomen Corp., Sojitz Corp. | 1998 | R&D and manufacture of acaricides for honey parasitic acarids |
| | Asahi Diamond Industrial Europe /Triefus France | Asahi Diamond Industrial Co., Ltd. | 1984 | Manufacture and sales of diamond tools |
| | Asahi Thermofil (France) S.A. | Asahi Kasei Corp., Sojitz Corp. | 1991 | R&D, design, manufacture and sales of plastic products and compounds |
| | Balenciaga S.A. | Sojitz Corporation | 1991 | Manufacture of "BALENCIAGA"- brand clothing, accessories and perfumes |
| | Barudan Co., Ltd. Succursales d'Alsace | Barudan Co., Ltd. | 1993 | Manufacture and sales of embroidery machines |
| | Beghin-Meiji Industries | Meiji Seika Kaisha, Ltd. | 1989 | Manufacture and sales of fructo-oligo saccharides |
| | Bridgestone / Firestone France S.A. | Bridgestone Corporation | 1988 | Manufacture and sales of tires |

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|---|--|--|---|---|
| France | Buchmann France SAS | Hoya Corporation | 1999 | Manufacture and sales of lenses for glasses |
| | Bull S.A. | NEC Corp., Dai Nippon Printing Co., Ltd. | 1995 | Manufacture and sales of computers |
| | Calgraph S.A. | Nireco Corporation | 1994 | R&D, design, manufacture and sales of image processing machines for printing machines |
| | CALLIOPE S.A. | Tomen Corp., Sojitz Corp. | 1994 | R&D, manufacture and sales of agricultural chemicals |
| | Canon Bretagne S.A. | Canon Inc., Canon Europa N.V. | 1983 | Manufacture of office machines (small copiers, LBPs, etc.) and toner cartridges |
| | Chateau Lacaze | Dainihon Fudosan Co., Ltd. | 1987 | Manufacture and sales of wine |
| | Chateau Lagrange S.A. | Suntory Ltd. | 1983 | Manufacture and sales of wine |
| | Chateau Reysson S.A.R.L. | Mercian Corporation | 1988 | Manufacture of wine |
| | Clarion France S.A. | Clarion Co., Ltd. | 1983 | R&D, manufacture and sales of car stereos |
| | Comaboko, S.A. | Marubeni Corp. (Marubeni Europe S.A.) | 1990 | R&D, design and manufacture of processed foods (boiled crab pastes, etc.) |
| | Comme des Garçons S.A. | COMME des GARÇONS | 1982 | Manufacture and sales of clothing |
| | Dacral S.A. | NOF Corporation | 1975 | Manufacture and sales of special antirusts |
| | Daiichi Sanofi Laboratories Synthelabo | Daiichi Pharmaceutical Co., Ltd. | 1989 | R&D, manufacture and sales of medicines |
| | DAIKIN CHEMICAL FRANCE S.A.S | Daikin Industries, Ltd. | 2004 | Manufacture of fluororubber |
| | Delphi Calsonic Compressors | Calsonic Kansei Corporation | 1996 | Manufacture of compressors for car air conditioners |
| | Dilor S.A. | Horiba, Ltd. | 1997 | Manufacture and sales of optical and precision apparatuses |
| | Domaine de Fontseche S.A.R.L. | Nikka Whisky Distilling Co., Ltd. | 1990 | Manufacture and sales of wine, cognac and cereals |
| | Domaine de la Lauzade Kinuito (S.A.R.L.) | Itoham Foods Inc. | 1987 | Manufacture and sales of wine |
| | Dunlop France S.A. | Sumitomo Rubber Industries, Ltd., Sumitomo Rubber Europe | 1984 | Manufacture and sales of tires and precision rubber parts |
| | Eagle-Witzenmann S.A.S. | Eagle Industries Co., Ltd. | 1998 | Manufacture of control valves for car air conditioners |
| | Emilio Robba SARL | Itokin Co., Ltd. | 1980 | Manufacture and sales of female dresses and accessories |
| | Epcos S.A. | Matsushita Electronic Components Co., Ltd. | 1989 | Manufacture of ferrite cores |
| | Epson Engineering (France) S.A. | Seiko Epson Corporation | 1988 | Manufacture of terminal printers |
| | Esteban | Nippon Kodo Co., Ltd. | 1996 | Manufacture and sales of interior fragrances mainly using ceramics |
| | Euro Pentel S.A. | Pentel Co., Ltd., Pentel (Stationery) Ltd. | 1966 | Manufacture and sales and export/import sales of stationery |
| | Eurodia Industrie S.A. | Tokuyama Corporation | 1993 | Manufacture and sales of films |
| | Exil S.A. | Tsukamoto Co., Ltd. | 1996 | Manufacture of high-class clothing |
| Francolor Pigments S.A. | Toyo Ink Mfg. Co., Ltd. (Toyo Europe Network S.A.S.) | 1993 | R&D, manufacture and sales of pigments for printing inks | |
| Freudenberg-Uchiyama Europe S.A. | Uchiyama Manufacturing Corporation | 1990 | R&D, design, manufacture and sales of gaskets (transport machine parts) | |
| Fromagerie Lorraine de Vezelise S.A. (F.L.V.) | Morinaga Milk Industry Co., Ltd., Mitsui & Co., Ltd. | 1991 | Manufacture of cheese | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|--|---|--|--|---|
| France | Fuji Electric France S.A. | Fuji Electric Co., Ltd. | 1995 | Manufacture and sales of measuring instruments |
| | Fujisawa SARL | Fujisawa Pharmaceutical Co., Ltd. | 1994 | R&D, manufacture and sales of medicines |
| | Generale Biscuit Glico France | Ezaki Glico Co., Ltd. | 1982 | Manufacture and sales of confectionery (biscuits) |
| | Gentleman Givenchy S.A. | Kakiuchi Co., Ltd. | 1987 | Design, manufacture and sales of men's clothing |
| | Georget S.A. | Dainippon Ink and Chemicals, Inc. | 1981 | Manufacture of printing inks for offset printing |
| | Glaverbel France S.A. | Asahi Glass Co., Ltd. | 1998 | Manufacture and sales of float glass and processed glass for motor vehicles |
| | Grands Millesimes de France | Suntory Ltd. | 1988 | Manufacture and sales of wine |
| | Hanae Mori Haute Couture S.A. | HANAE MORI Associates Co., Ltd. | 1976 | Manufacture and sales of haute couture dresses |
| | Heitz Alsacol Industries, S.A. | Dainippon Ink and Chemicals, Inc. | 1995 | Manufacture of industrial adhesives |
| | Hitachi Computer Products (Europe) S.A. | Hitachi, Ltd. | 1991 | R&D and manufacture of magnetic storages for large computers |
| | Hitachi Furukawa Loaders Europe S.A.S. | Hitachi Construction Machinery Co., Ltd., Furukawa Co., Ltd. | 2002 | R&D and manufacture of wheel loaders |
| | Hitachi Software Engineering Europe S.A. (HSEE) | Hitachi Software Engineering Co., Ltd. | 1994 | R&D, manufacture and sales of software products |
| | Honda Europe Power Equipment S.A. | Honda Motor Co., Ltd. (Honda Motor Europe Ltd.), Honda Motor Europe (South) S.A. | 1985 | R&D, manufacture and sales of lawn mowers and dynamo-electric generators |
| | Hoya Lens France S.A. | Hoya Corp. (Hoya Holding N.V.) | 1997 | Manufacture and sales of lenses for glasses and allied apparatuses |
| | HPI Hydroperfect International S.A. | Koyo Seiko Co., Ltd. (SMI S.A.) | 1994 | R&D, design, manufacture and sales of motor-operated pumps, gear pumps and gear motors for machines for the automotive industry |
| | IBIDEN DPF FRANCE S.A.S | IBIDEN Co., Ltd. | 2001 | Manufacture of diesel particulate filters |
| | Iris Instruments S.A. | Oyo Corporation | 1990 | R&D, design, manufacture and sales of measuring instruments for geotechnical engineering |
| | Itoh Denki Europe S.A. | Itoh Electric Co., Ltd. | 1987 | Manufacture and sales of motor rollers for belt conveyors |
| | J.S.T. France S.A. | J.S.T. Mfg. Co., Ltd. | 1988 | Manufacture and sales of connectors |
| | Jideco-4e S.A. | Jidosha Denki Kogyo Co., Ltd. | 1996 | R&D, manufacture and sales of automotive parts (power seat motors, wiper systems and power window motors) |
| | JOBIN-YVON S.A. | Horiba, Ltd. | 1997 | R&D, manufacture and sales of optical and precision apparatuses |
| | JSP International Sarl | JSP Corporation | 1993 | R&D, manufacture and sales of resin foams |
| | KENWOOD Electronics Bretagne S.A. | Kenwood Corporation | 1985 | R&D and manufacture of tuners, car stereos and communication apparatuses |
| | Kodak Polychrome France S.A. | Dainippon Ink and Chemicals, Inc. (Sun Chemical Francei) | 1973 | Manufacture and sales of offset printing inks |
| KOMORI CHAMBON SA | Komori Corporation | 1989 | R&D, manufacture and sales of printing machines for paper containers | |
| Konica Minolta Supplies Manufacturing France S.A.S | Konica Minolta Holdings, Inc. | 1990 | Assembly of copiers, manufacture of toner and manufacture and assembly of copier units | |
| KOYO STEERING DIJION SAINT ETIENNE S.A.S. | Koyo Seiko Co., Ltd. | 2000 | R&D, manufacture and sales of automotive parts (steering) | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---------|---|--|----------------|--|
| France | Laboratoires Radiatex S.A. | Sagami Rubber Industries Co., Ltd., Sagami Sangyo Co., Ltd., Modern Rubber Co., Ltd. | 1982 | Manufacture and sales of condoms |
| | LCO-Protomoule Group | Arrk Corporation | 2001 | Manufacture of metal molds and molded articles |
| | Louis Royer Et Cie S.A. | Suntory Ltd. (Suntory France) | 1989 | R&D, manufacture and sales of cognac and liqueur |
| | M.B.K. Industrie | Yamaha Motor Co., Ltd., Yamaha Motor Europe N.V. | 1986 | R&D, design, manufacture and sales of motor bicycles, bicycles, outboard motors and parts thereof |
| | MELCO Mobile Communications Europe S.A. | Mitsubishi Electric Corporation | 2002 | Manufacture of cellular phones |
| | Menicon europe S.A. | Menicon Co., Ltd. | 1976 | Manufacture and sales of contact lenses and allied products |
| | Menicon Pherme | Menicon Co., Ltd. | 1992 | Manufacture of contact lenses and maintenance products |
| | Mitsui-Eurocel S.A. | Mitsui Mining and Smelting Co., Ltd. (Mitsui Mining and Smelting (Netherlands) BV), Mitsui & Co., Ltd. | 1985 | Manufacture and sales of electrolytic copper foils for printed circuit boards |
| | NEPCO S.A. | Sojitz Group., Nakatani Sogyo K.K. | 1990 | Manufacture and sales of CD cases and micro-FD shells |
| | NGK BERYLCO FRANCE | NGK Insulators, Ltd. | 1986 | Manufacture and sales of copper and copper alloy products |
| | NGK Spark Plug Industries Europe S.A. | NGK Spark Plug Co., Ltd. | 1990 | Manufacture of spark plugs for internal combustion engines |
| | NTN Transmissions Europe | NTN Corporation | 1999 | R&D and manufacture of constant velocity joints for motor vehicles |
| | Ogura S.A.S | Ogura Clutch Co., Ltd., Ogura Corporation (USA) | 1996 | Manufacture and sales of electromagnetic clutches for car air conditioners |
| | Oniris S.A. | Sumitomo Rubber Industries Ltd. | 1947 | R&D, manufacture and sales of bed clothing |
| | Packard Bell NEC | Packard Bell NEC Europe (Packard Bell NEC Europe (USA)) | 1996 | Manufacture of computers |
| | Peugeot Motocycles S.A. | Honda Motor Co., Ltd. | 1985 | R&D, design, manufacture and sales of autobicycles |
| | Pilot Industry Europe | Pilot Corporation | 1996 | Manufacture of ball-point pens and fountain pens |
| | Pioneer Electronics France S.A. | Pioneer Corp. (Pioneer Electronics B.V.) | 1985 | Design, manufacture and sales of speaker systems |
| | Pochet Inoac Inc. | Inoac Corporation | 1994 | Manufacture of PET containers for cosmetics |
| | Raguneau S.A. | Raguneau Sasaki K.K. | 1995 | Manufacture of foodstuffs |
| | Reichhold Chemi S.A. | Dainippon Ink and Chemicals, Inc. | 1987 | Manufacture and sales of synthetic resin-related products |
| | Ricoh Industrie France S.A. | Ricoh Co., Ltd. | 1987 | Manufacture of copiers, facsimile machines and fixing roller toners, and R&D, manufacture and sales of thermal paper |
| | Rohm LSI Sysytems | Rohm Co., Ltd. | 2000 | Development, design and manufacture of LSIs |
| | S.E.I.A. S.N. | Sumitomo Rubber Industries, Ltd. (Dunlop France S.A.) | 1984 | Manufacture and sales of reclaimed tires |
| | S2M Societe de Mecanique Magnetique | Seiko Seiki Co., Ltd. | 1995 | Manufacture of vacuum pumps and R&D of special bearing super pumps |
| | SAKATA VEGETABLES EUROPE SARL | Sakata Seed Corporation | 1996 | Manufacture and sales of vegetable and flower breeds |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|------------|---|---|--------------------------------------|--|
| France | Sanden Manufacturing Europe S.A. | Sanden Corporation | 1995 | Manufacture and sales of compressors for car air conditioners |
| | Sankyo Pharma France SARL | Sankyo Co., Ltd. (Sankyo Pharma (Schweiz)) | 1977 | Manufacture of raw materials for pharmacy |
| | Sansetsu France S.A. | Sansetsu Transportation Co., Ltd., Sansetsu UK Ltd. | 1986 | Manufacture and sales of cushioning packaging materials |
| | SC Chateau Beychevelle | Suntory Ltd. | 1989 | Brewing and sales of wine |
| | SCE Chateau Beaumont | Suntory Ltd. | 1989 | Manufacture and sales of wine |
| | Sealed Air Packaging, S.A. | JSP Corporation | 1985 | Manufacture and sales of various cellular plastic products |
| | Sharp Manufacturing France S.A. | Sharp Corporation | 1989 | Manufacture of office apparatuses |
| | Shiba's France S.A. | Royal Shiba's Ltd. | 1996 | Manufacture and sales of bread and confectionery |
| | Shiseido International France | Shiseido Co., Ltd. (Shiseido Europe S.A.) | 1990 | Manufacture and sales of cosmetics |
| | SISSA (SUD ISK-SNPE S.A.) | Ishihara Sangyo Kaisha, Ltd. | 1994 | Manufacture of agricultural chemicals |
| | Societe Civile d'Etudes et de Recherches Takasago | Takasago International Corporation | 1978 | Manufacture and sales of perfume, cologne, etc. |
| | Societe de Mecanique d'IRIGNY (S.M.I.) | Koyo Seiko Co., Ltd. | 1991 | R&D, design, manufacture and sales of automotive parts (steering) |
| | Societe des Fibres de Carbone S.A. (SOFICAR) | Toray Industries, Inc. | 1982 | Manufacture and sales of carbon fibers |
| | Societe d'Exploitation et de Participation Viti-Vinicole (SEPV) | Snow Brand Milk Products Co., Ltd. | 1994 | Manufacture of wine |
| | Societe Nouvelle de Transmissions | NTN Corporation | 1998 | Manufacture of automotive parts (constant velocity joints) |
| | Sony France S.A. | Sony Corporation | 1973 | Manufacture and sales of audio cassettes, video cassettes, CD players and 8mm video products |
| | SONY FRANCE S.A. EMCS Alsace Centre de Technologie | Sony Corporation | 1985 | Manufacture of computers and cellular phones |
| | Stanley- Idess S.A. | Stanley Electric Co., Ltd. | 1988 | Manufacture and sales of light emitting diodes and applied products thereof |
| | Structil S.A. | Mitsubishi Rayon Co., Ltd. | 1998 | Manufacture and sales of drawn parts and prepregs of carbon fibers |
| | SUMCO FRANCE S.A.S. | Sumitomo Metal Industries, Ltd., Mitsubishi Materials Corp. | 1995 | Manufacture and sales of silicon wafers |
| | Sumitomo Chemical Agro Europe S.A. | Sumitomo Chemical Co., Ltd. | 1994 | Development, registration, manufacture (only processing) and sales of agricultural chemicals |
| | SUMITOMO METAL EPITECH S.A.S. | Sumitomo Metal Industries, Ltd. | 1995 | Manufacture and sales of silicon wafers |
| | Sun Chemical S.A. | Dainippon Ink and Chemicals, Inc. | 1986 | Manufacture and sales of printing inks |
| | Synthelabo Tanabe Chimie S.A. (S.T.C.) | Tanabe Seiyaku Co., Ltd. | 1989 | Manufacture of therapeutic agents (calcium antagonists) |
| | Takasago Europe Perfumery Laboratory S.A.R.L. | Takasago International Corporation | 1978 | R&D, design, manufacture and sales of mixed and synthetic perfumes |
| | Tetras | Canon Inc. | 1986 | R&D, manufacture and sales of copiers |
| | Thepenier Pharma Industrie S.A. | Nihon Shikizai Inc. | 2000 | R&D, manufacture and sales of medicines and cosmetics |
| THK France | THK Co., Ltd. | 2000 | Manufacture of direct acting systems | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|----------------------|---|---|--|---|
| France | THK Manufacturing of Europe S.A.S. | THK Co., Ltd. | 2000 | Manufacture of linear motion guides |
| | Three Bond Europe S.A. | Three Bond Co., Ltd. | 1976 | R&D, manufacture and sales of adhesives, sealing agent and processed parts (for automotive engines) |
| | Todenco France S.A. | Tokyo Electric Wire Industrial Co., Ltd. | 1988 | Manufacture and sales of electric wires and electric cables |
| | Tomy France S.A. | Tomy Corporation | 1985 | Manufacture and sales of toys |
| | Toray Plastics Europe S.A.(TPEU) | Toray Industries, Inc. | 1996 | R&D, manufacture and sales of polyester films |
| | Toraya France S.A.R.L. | Toraya Co., Ltd. | 1980 | Manufacture and sales of Japanese confectionery |
| | Toshiba Lighting Products (France) S.A. | Harison Toshiba Lighting Corporation | 1987 | Manufacture and sales of electric supplies, halogen lumps and fluorescent lamps |
| | Toshiba Systemes (France) S.A. | Toshiba Corp., Toshiba Europe GmbH | 1986 | Manufacture and sales of OA apparatuses |
| | TOSHIBA TEC EUROPE IMAGING SYSTEMS S.A. | Toshiba Tec Corporation | 1999 | Manufacture and sales of copiers, toners, etc. |
| | Toyal Europe S.A. | Toyo Aluminium K.K. | 1982 | Manufacture and sales of aluminum pastes and powders |
| | Toyota Industrial Equipment S.A. | Toyota Industries Corp., Toyota Motor Corp. | 1995 | Manufacture of industrial vehicles (forklifts) |
| | Toyota Motor Manufacturing France (TMMF) S.A. | Toyota Motor Corporation | 1998 | Manufacture of motor vehicles |
| | TPC S.A. | Kyocera Corporation (AVX Corporation) | 1998 | Manufacture of electronic parts (film capacitors, ferrite, capacitors for high-voltage power, etc.) |
| | Valeo Vision | Ichikoh Industries, Ltd. | 1980 | Manufacture of lighting fixtures for motor vehicles |
| | Yamaha Electronique Alsace S.A. | Yamaha Corporation | 1989 | Manufacture of audio products and aftersales service for computer apparatuses |
| | Yamazaki France S.A. | Yamazaki Baking Co., Ltd. | 1988 | Manufacture and sales of cakes and cooked foods |
| YKK France S.A.R.L. | YKK Corp. (YKK Holding Europe B.V.) | 1967 | R&D, design, manufacture and sales of slide fasteners, plastic buckles and Hook-and-Loop fasteners | |
| Yokogawa France S.A. | Yokogawa Electric Corporation | 1992 | Manufacture and sales of industrial measuring instruments | |
| Germany | ADZ Nagano GmbH | Nagano Keiki Co., Ltd. | 1999 | Manufacture of sensors and pressure gauges |
| | Akzo Nobel Nippon Paint GmbH | Nippon Paint Co., Ltd. | 1995 | Manufacture and sales of coating materials for coil coating |
| | Alps Electric Europa GmbH | Alps Electric Co., Ltd. | 1979 | Manufacture and sales of magnetic heads, tact switches, cylinder units and liquid crystal displays |
| | BBS Kraftfahrzeug-Technik GmbH | Washi Baem Co., Ltd., Washi Kosan K.K. | 1990 | Manufacture and sales of aluminum wheels for motor vehicles |
| | Benoac Fertigteile GmbH | Inoue Corporation | 1986 | Manufacture and sales of automotive parts |
| | BLV Licht-und Vakuumtechnik GmbH | Ushio Inc. | 1990 | R&D, manufacture and sales of electric bulbs |
| | Boizenburg Gail-Inax AG | INAX Corporation | 1989 | Manufacture and sales of porcelain tiles |
| | Bregal Bremer Galvaniseriungs GmbH | ITOCHU Corp. (Marubeni-Itochu Steel Europe) | 1990 | Manufacture of zinc hot dipped steel plates |
| | BT Magnet Technology GmbH | TDK Corporation | 1991 | Manufacture and sales of ferrite magnets and powder metallurgical products |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|-----------------------|---|--|--|--|
| Germany | Canon Giessen GmbH | Canon Inc., Canon Europa N.V. (Netherlands) | 1972 | Manufacture and sales of copiers and photosensitive drums, filling of copier cartridge toners and filling of cartridge inks for printers |
| | Celon AG medical instruments | Olympus Corporation | 2004 | R&D, manufacture and sales of medical apparatuses (endoscopes) |
| | Chukyo Europe GmbH | Chukyo Yushi Co., Ltd. | 1990 | Manufacture of releasing agents for polyurethane and heat-sensitive coating materials |
| | Citizen Machinery & Boley GmbH | Citizen Shoji Co., Ltd. (Citizen Watch Europe GmbH) | 1992 | R&D and manufacture of precision CNC lathes |
| | Cloyes Europe GmbH | Sumitomo Corporation | 2002 | Manufacture of powder metallurgical products and transmission machines |
| | DAS Duennschicht Anlagensysteme GmbH Dresden | Mitsubishi Kakoki Kaisha, Ltd. | 2004 | Manufacture of exhaust gas removing devices |
| | Denon Electronic GmbH | Denon, Ltd. | 1988 | Manufacture and sales of audio products |
| | Dipl. -Ing Reinhold Eggers GmbH | Ushio Inc. | 1990 | Manufacture and sales of electric apparatuses |
| | Dolmar GmbH | Makita Corporation | 1991 | R&D, manufacture and sales of chain saws and garden tools |
| | Dunlop GmbH | Sumitomo Rubber Industries, Ltd., Sumitomo Electric Industries, Ltd., Sumitomo Corp. | 1984 | Manufacture and sales of tire tubes |
| | DYNAT Gesellschaft Fuer Verschluss Technik und Feinmechanik mbH | YKK Corporation | 1995 | Manufacture and sales of fasteners |
| | Elbe Metal Technik GmbH | Fujitsu Giken Co., Ltd. | 1987 | Manufacture and sales of automotive parts (sport mufflers) |
| | Faun GmbH | Tadano Ltd. | 1990 | R&D and manufacture of truck cranes and manufacture of vehicles for high lift work |
| | Freudenberg Mektec Europa GmbH | Nippon Mektron Ltd. | 1990 | Manufacture and sales of flexible wiring boards |
| | Fuji Magnetics GmbH | Fuji Photo Film Co., Ltd. | 1987 | Manufacture and sales of magnetic tapes |
| | Fujisawa Deutschland | Fujisawa Pharmaceutical Co., Ltd. | 1983 | Manufacture of medicines |
| | Fujitsu Siemens Computers | Fujitsu Ltd. | 1999 | Manufacture of computer-related apparatuses |
| | Hartmann Druckfarben GmbH | Dainippon Ink and Chemicals, Inc. | 1986 | Manufacture and sales of printing inks |
| | Heinrich Wagner Sinto Maschinenfabrik GmbH | Shinto Kogio Ltd. | 1983 | Manufacture and sales of casting machines |
| | Hi-Bis GmbH | Honshu Chemical Industry Co., Ltd., Bayer AG, Mitsui & Co., Ltd. | 2001 | Manufacture of special bisphenol |
| | Hirata Robotics GmbH | Hirata Corporation | 1993 | Manufacture and sales of robot systems for assembling light electrical products and motor vehicle-related apparatuses |
| | Hitachi Automotive Systems Europe GmbH | Hitachi, Ltd. | 2003 | Manufacture of high-pressure pumps for direct-injection gasoline engines |
| | Hosokawa Alpine Aktiengesellschaft & Co.OHG | Hosokawa Micron Corp. (HMI-Unternehmens-Holding GmbH) , HOS Beteiligungs GmbH | 1987 | Manufacture and sales of powder apparatuses and film molding apparatuses |
| | Hosokawa Bepex GmbH | Hosokawa Micron Corporation | 1992 | Manufacture and sales of powder apparatuses and food apparatuses |
| Hosokawa Kreuter GmbH | Hosokawa Micron Corporation | 1996 | Manufacture and sales of confectionery technology machines | |
| Hosokawa Micron GmbH | Hosokawa Micron Corporation | 1985 | Manufacture and sales of powder apparatuses and systems and environmental conservation apparatuses | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|-------------------------|---|--|--|---|
| Germany | Hoya Lens Deutschland GmbH | Hoya Corporation | 1979 | Manufacture and sales of lenses for glasses |
| | J.S.T.Deutschland GmbH | J.S.T. Mfg. Co., Ltd. | 1984 | R&D, manufacture and sales of connectors and continuous and loose terminals |
| | JT International Germany GmbH Werk Trier | Japan Tobacco Inc. | 1999 | Manufacture of tobacco products |
| | JVC Video Manufacturing Europe GmbH | Victor Co. of Japan Ltd. | 1981 | Manufacture and sales of VHS and deck-type VTRs |
| | KANZAN Spezialpapiere GmbH | Oji Paper Co., Ltd., Marubeni Corp. | 1990 | R&D, manufacture and sales of thermosensitive paper |
| | Kao Chemicals GmbH | Kao Corp. (Kao Chemicals Europe S.L.) | 1992 | R&D, manufacture and sales of surfactants |
| | KB Roller Tech Kopierwalzen GmbH & Co.KG | Kinyosha Co., Ltd. | 1987 | Manufacture and sales of silicone rubber rollers for copiers |
| | Kodak polychrome graphics GmbH | Dainippon Ink and Chemicals, Inc. | 1989 | Manufacture of printing materials |
| | Komatsu Hanomag A.G. | Komatsu Manufacturing Co., Ltd. | 1989 | Manufacture and sales of construction machines |
| | Komatsu Mining Germany GmbH | Komatsu Manufacturing Co., Ltd. | 1996 | Manufacture and sales of hydraulic excavators |
| | Kubota Baumaschinen GmbH | Kubota Corporation | 1988 | Design and manufacture of small construction machines |
| | Kuraray Specialities Europe GmbH | Kuraray Co., Ltd. (Eval Europe N.V.) | 2001 | Manufacture and sales of chemical products (poval and butyral resins) |
| | Kurita Europe GmbH | Kurita Water Industries Ltd., ITOCHU Corp. | 1989 | Manufacture and sales of water treatment chemicals |
| | Lafarge Refractories GmbH | Nippon Crucible Co., Ltd., Mitsui & Co., Ltd. | 1975 | Manufacture and sales of monolithic refractories for blast furnace troughs |
| | Makino Werkzeugmaschinenfabrik GmbH | Makino Milling Machine Co., Ltd. | 1978 | R&D, manufacture and sales of machine tools and electric discharge machines |
| | Matsushita Electric Works (Europe) AG | Matsushita Electric Works, Ltd. | 1989 | R&D, manufacture and sales of automatic controller parts |
| | Matsushita Electronic Components(Europe) GmbH | Matsushita Electronic Components Co., Ltd., Matsushita Display Device (Germany) GmbH | 1984 | Manufacture and sales of tuners for TVs and videos, various digital tuners, RF modulators, power and control circuit units, remote controllers and printed board assemblies |
| | MDC Power GmbH | Mitsubishi Motors Corporation | 2001 | Manufacture of automotive engines |
| | Milei GmbH | Morinaga Milk Industry Co., Ltd. | 1972 | Manufacture and sales of dairy products |
| | Mitsubishi Hitec Paper Bielefeld | Mitsubishi Paper Mills, Ltd., Mitsubishi Corp. | 1998 | Manufacture and sales of pressure sensitive paper and cast-coated paper |
| | Mitsubishi Hitec Paper Flensburg | Mitsubishi Paper Mills, Ltd., Mitsubishi Corp. | 1996 | Manufacture and sales of thermosensitive paper and inkjet paper |
| | Mitsubishi Paper GmbH | Mitsubishi Paper Mills, Ltd. | 1989 | Manufacture and sales of paper, photosensitive materials, etc. |
| | Mitsubishi Polyester Film GmbH | Mitsubishi Chemical Corporation | 1991 | Manufacture and sales of PET films |
| | Miyachi Europe GmbH | Miyachi Technos Corporation | | Manufacture and sales of small precision resistance-welding power sources |
| Motoman Robotec GmbH | Yaskawa Electric Corporation | 1992 | Manufacture and sales of robot systems | |
| MT Picture Display GmbH | Matsushita Electric Industrial Co., Ltd., Toshiba Corp. | 2003 | R&D and manufacture of displays | |
| Neueweg Fertigung GmbH | NSK Ltd. (NSK Europa Holding GmbH) | 1990 | Manufacture and sales of bearings | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|--|--|---|--|--|
| Germany | Nikkiso Deutschland GmbH | Nikkiso Co., Ltd. | 1973 | Manufacture and sales of special precision pumps |
| | NTN Kugellagerfabrik (Deutschland) GmbH | NTN Corporation | 1971 | Manufacture of bearings |
| | Nutrichem Diaet + Pharma GmbH | SS Pharmaceutical Co., Ltd. | 1989 | Manufacture of medicines and foods |
| | Oiles-Tribomet Gleitelemente GmbH | Oiles Corporation | 1997 | Manufacture and sales of general machines |
| | Okuma Europe GmbH | Okuma Corporation | 1988 | Manufacture, sales and engineering of machine tools |
| | Olympus Diagnostica GmbH | Olympus Corp. (Olympus Optical Co. (Europe) GmbH) | 1989 | Manufacture and sales of diagnostic reagents |
| | Olympus Winter & Ibe GmbH | Olympus Corp. (Olympus Optical Co. (Europe) GmbH) | 1979 | Manufacture and sales of medical apparatuses (endoscopes) |
| | Omron Electronics Manufacturing GmbH | OMRON Europe B.V. | 1992 | Design and manufacture of sensors for FA |
| | Optrex Europe GmbH | Optrex Corporation | 1989 | R&D, design, manufacture and sales of liquid crystal displays (LCDs) |
| | P+P Materialfluss-Systeme GmbH | Toyo Kanetsu K.K. | 1994 | Development, manufacture and sales of automatic picking devices |
| | Panasonic Automotive Systems Europe GmbH | Matsushita Communication Industrial Co., Ltd., Matsushita Electric Industrial Co., Ltd. | 1985 | R&D, manufacture and sales of car audio apparatuses and CCTVs (monitoring cameras) |
| | Precision System Science (PSS) Europe GmbH | Precision System Science Co., Ltd. | 2001 | Development, manufacture and sales of automation systems for R&D and practical application related to gene/proteome analysis and other automation systems/software |
| | RENESAS Semiconductor Europe (Landshut) GmbH | Hitachi, Ltd., Mitsubishi Electric Corp. | 2003 | Design and manufacture of electronic parts (semiconductor memories) |
| | ROTA Yokogawa GmbH & Co. KG | Yokogawa Electric Corp. (Yokogawa Europe) | 1991 | Manufacture of flow meters and pharmaceutical machines |
| | Ruetgers Kureha Solvents GmbH | Kureha Chemical Industry Co., Ltd. | 1982 | Manufacture and sales of chemical industry products for papermaking |
| | Sankyo Pharma GmbH | Sankyo Co., Ltd. | 1990 | R&D, manufacture and sales of medicines |
| | Sansetsu Deutschland GmbH | Sansetsu Warehouse Co., Ltd., Sansetsu UK Ltd. | 1973 | Manufacture and sales of cushioning packaging materials |
| | SMB Modell- und Werkzeugbau GmbH Shin Nippon Koki Co.,Ltd. | Shin Nippon Koki Co., Ltd. | 2004 | Manufacture of plastic molds |
| | SMC Pneumatik GmbH | SMC Corporation. | 1978 | Manufacture and sales of pneumatic apparatuses |
| | Sumitomo (SHI) Cyclo Drive Germany GmbH | Sumitomo Heavy Industries, Ltd. | 1989 | R&D, manufacture and sales of mechanical power transmission devices and electric apparatuses, and manufacture and sales of reduction gears |
| Sumitomo Electric Hartmetallfabrik GmbH | Sumitomo Electric Industries, Ltd. (Sumitomo Electric Hartmetall GmbH) | 1989 | Manufacture and sales of cutting tools | |
| Sumitomo Electric Schrumpf Produkte GmbH | Sumitomo Electric Industries, Ltd. | 1991 | Manufacture and sales of heat shrinkable tubes | |
| Sun Chemical Druckfarben GmbH | Dainippon Ink and Chemicals, Inc. | 1996 | R&D, manufacture and sales of printing inks | |
| Sysmec Europe GmbH | Sysmex Corporation | 1980 | Manufacture of reagents for blood tests and assistance for sales of medical appliances | |

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|---------------------------|--|--|------------------------------------|--|
| Germany | Takasago Europe GmbH | Takasago International Corporation | 1992 | Manufacture of edible spices |
| | TAKATA-PETRI AG Berlin | Takata Corporation | 1995 | Manufacture and sales of air bags and seat belts for passenger cars |
| | TAKATA-PETRI (Sachsen) GmbH | Takata Corporation | 1995 | Manufacture and sales of air bags and seat belts for passenger cars |
| | TAKATA-PETRI (Ulm) GmbH | Takata Corporation | 1995 | Manufacture and sales of air bags and seat belts for passenger cars |
| | TAKATA-PETRI AG Plant I-III | Takata Corporation | 1995 | Manufacture and sales of air bags and seat belts for passenger cars |
| | TD Deutsche Klimakompressor GmbH | Toyota Industries Corp., Denso Corp. | 1998 | Manufacture and assembling of continuously variable displacement compressors and magnet clutches |
| | Tenax Fibers GmbH & Co. KG | Toho Tenax Co., Ltd. | 1993 | R&D, manufacture and sales of industrial highly functional fibers |
| | TOGO SCHERDEL GmbH | Togo Seisakusyo Corporation | 2003 | Manufacture of compression springs, blade springs and tension springs |
| | Tokai Europe GmbH | Tokai Corporation | 1982 | Manufacture and sales of disposable lighters |
| | Toshiba Europe GmbH Regensburg Works | Toshiba Corporation | 1989 | Manufacture and sales of personal laptop computers |
| | Toshiba Semiconductor GmbH | Toshiba Corp. (Toshiba Electronics Europe GmbH) | 1982 | Manufacture of ASICs, IGBTs and LEDs |
| | Vossloh-Schwabe Matsushita Electric Works GmbH | Matsushita Electric Works, Ltd. | 2001 | Manufacture and sales of electric and electronic parts |
| | Wako Chemicals GmbH | Wako Pure Chemical Industries, Ltd. | 1974 | Manufacture and sales of chemical products and clinical testing reagents |
| | Weingut Reichsrat Von Buhl | St. Michael Wine and Spirits, Sanyo Electric Trading Co., Ltd. | 1989 | Manufacture and sales of wine |
| | Wilhelm Schimmel Pianoforte-fabrik GmbH | Yamaha Corporation | 1989 | Manufacture and sales of pianos |
| YKK Deutschland GmbH | YKK Corp. (YKK Holding Europe B.V.) | 1967 | Manufacture and sales of fasteners | |
| YKK Stocko Fasteners GmbH | YKK Holding Europe B.V. | 1994 | Manufacture and sales of notions | |
| Netherlands | Bruynzeel Potlodenfabriek B.V. | Sakura Color Products Corporation | 1997 | Manufacture and sales of pencils |
| | Calsonic Exhaust Systems B.V. | Calsonic Corp., Calsonic International Europe | 1985 | Manufacture of mufflers for motor vehicles |
| | Chugoku Paints B.V. | Chugoku Marine Paints, Ltd. | 1991 | R&D, manufacture and sales of coating materials |
| | Daikin Chemical Netherlands B.V. | Daikin Industries, Ltd. | 1998 | Pre-compound processing of fluororubber |
| | Delamine B.V. | Tosoh Corporation | 1976 | Manufacture and sales of ethyleneamine |
| | Eslon B.V. | Sekisui Chemical Co., Ltd. | 1974 | R&D, manufacture and sales of plastic building materials |
| | Euro-Mit Staal B.V. | Mitsui & Co., Ltd., Hirohata Denjiko Center | 1991 | Shearing and sales of thin steel sheets |
| | Fuji Photo Film B.V. | Fuji Photo Film Co., Ltd. | 1982 | R&D, manufacture and sales of photosensitive materials for photography |
| | Fuji Seal Europe B.V. | Fuji Seal Industries Co., Ltd. | 1994 | R&D, manufacture and sales of machines for attaching shrink labels and cap seals |
| | Glaverbel Nederland B. V. | Asahi Glass Co., Ltd. | 1981 | Manufacture and sales of float glass, double glazing and architectural processed glass |

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|----------------------|--|--|---|---|
| Netherlands | Hitachi Construction Machinery (Europe) B.V. | Hitachi Construction Machinery Co., Ltd., Hokuetsu Kogyo Co., Ltd. | 1972 | Manufacture and sales of construction and civil engineering machines |
| | Hokushin Europe B.V. | Hokushin Kogyo Co., Ltd., Sumitomo Corp., Sumitomo Corporation (Europe) | 1988 | Manufacture and sales of cleaning blades and feed rollers |
| | Holland Sweetener Company VOF | Tosoh Corporation | 1985 | Manufacture and sales of aspartame (artificial sweetener) |
| | Hosokawa Micron International B.V. | Hosokawa Micron Corporation | 1983 | Manufacture and sales of powder treatment devices |
| | Hosokawa Ter Braak B.V. | Hosokawa Micron Corporation | 1996 | Manufacture and sales of confectionery making apparatuses and R&D of confectionery making systems |
| | Hoya Lens Europe B.V. | Hoya Corp. (Hoya Holding N.V.) | 1981 | Manufacture and sales of lenses, frames and processing apparatuses for glasses |
| | IRIS Ohyama Europe B.V. | IRIS Ohyama Co., Ltd. | 1998 | Manufacture and sales of plastic and non-plastic household articles |
| | KIKKOMAN FOODS EUROPE B.V. | Kikkoman Corporation | 1996 | R&D and manufacture of soy sauce and allied commodities |
| | KISUMA CHEMICALS B.V. | Kyowa Chemical Industry Co., Ltd. | 1997 | Manufacture of synthetic hydrotalcite and magnesium hydroxide |
| | Kobelco Welding of Europe B.V. | Kobe Steel, Ltd., Sojitz Corp. | 1994 | Manufacture and sales of stainless steel welding materials |
| | Krehalon Synclair Packaging B.V. | Kureha Chemical Industry Co., Ltd. (Kureha Europe B.V.) | 1989 | Manufacture and sales of food packaging materials |
| | MHI Equipment Europe B.V. | Mitsubishi Heavy Industries, Ltd. | 1980 | Manufacture and sales of industrial engines and turbo chargers for passenger cars |
| | Mitsubishi Caterpillar Forklift Europe B.V. | Mitsubishi Heavy Industries, Ltd., Mitsubishi Corp. | 1992 | Design, manufacture and sales of forklifts |
| | Mitsubishi Electric Automotive Europe B.V. | Mitsubishi Electric Corporation | 1998 | Manufacture of apparatuses for motor vehicles and allied products |
| | Mitsubishi Elevator Europe B.V. | Mitsubishi Electric Corporation, Mitsubishi Electric Building Techno-Service Co., Ltd. | 1996 | R&D, design, manufacture, sales, installation and maintenance of elevators |
| | Mitutoyo Nederland B.V. | Mitutoyo Corporation | 1988 | R&D, manufacture and sales of precision measuring instruments |
| | NEC Computers International B.V. | NEC Corporation | 1999 | Development, manufacture and sales of PCs and PC servers |
| | Netherlands Car B.V. | Mitsubishi Motors Corporation | 1991 | Manufacture of passenger cars |
| | Newlong Holland B.V. | Newlong Co., Ltd., Newlong Singapore (PTE) Ltd. | 1984 | Manufacture and sales of packaging machines |
| | Nichia Europe B.V. | Nichia Corporation | 1999 | Manufacture and sales of precision chemicals, mainly fluorescent substances |
| | Nitta Corporation of Holland B.V. | Nitta Industries Co., Ltd. | 1991 | R&D, manufacture and sales of resin conveyor belts |
| | Omron Manufacturing of the Netherlands B.V. | OMRON Corp. (Omron Electronics Europe B.V.) | 1989 | R&D, manufacture and sales of FA-related apparatuses |
| | Plalloy MTD B.V. | Mitsui & Co., Ltd., Dainichiseika Color & Chemicals Mfg. Co., Ltd. | 1989 | Manufacture and sales of synthetic resin compounds |
| | Royal Talens B.V. | Sakura Color Products Corporation | 1991 | Manufacture and sales of drawing materials |
| Sanko Nederland B.V. | Sanko Gosei Ltd., Mitsui & Co., Ltd. | 1995 | Manufacture and sales of plastic parts for motor vehicles | |
| Sekisui Alveo B.V. | Sekisui Chemical Co., Ltd. | 1973 | R&D and manufacture of polyolefin foams | |

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|---|---|---|--|--|
| Netherlands | Sekisui Jushi B.V. | Sekisui Jushi Co., Ltd. | 1973 | Manufacture and sales of plastic packaging materials (PP bands) |
| | Sekisui S-Lec B.V. | Sekisui Chemical Co., Ltd. (Sekisui Europe AG) | 1996 | Manufacture and sales of intermediate films for safety glass |
| | Shin-Etsu Polymer Europe B.V. | Shin-Etsu Polymer Co., Ltd. | 1986 | Manufacture and sales of silicone rubber switches (electronic parts) |
| | Shin-Etsu PVC B.V. | Shin-Etsu Chemical Co., Ltd. | 1999 | Manufacture and sales of PVC resins |
| | Shin-Etsu Silicones Europe B.V. | Shin-Etsu Chemical Co., Ltd. | 1989 | Manufacture and sales of silicone resins |
| | Shin-Etsu VCM B.V. | Shin-Etsu Chemical Co., Ltd. | 1999 | Manufacture and sales of PVC resins |
| | Sony Chemicals Europe B.V. | Sony Chemicals Corporation | 1992 | Manufacture and sales of thermal transfer ink ribbons |
| | SPF Europe N.V. | Showa Entetsu Co., Ltd. | 1989 | Manufacture and sales of electrodes, surface plated equipment and corrosion preventive process apparatuses for the chemical industry |
| | Teijin Twaron B.V. | Teijin Ltd. | 2001 | Manufacture and sales of Twaron (para-aramid fibers) |
| | Uni-Charm Molnlycke B.V. | Uni-Charm Corporation | 1993 | Manufacture of pants-type paper diapers for babies and paper diapers for adults |
| | Weld-Equip saless B.V. | Miyachi Technos Corporation | 1995 | Manufacture of precision welding machines |
| | Yakult Europe B.V. | Yakult Honsha Co., Ltd. | 1992 | Manufacture and sales of lactic acid bacteria drink "Yakult" |
| | YAMADA EUROPE B.V. | Yamada Corporation | 1985 | Manufacture and sales of diaphragm pumps |
| | Yamanouchi Europe B.V. | Yamanouchi Pharmaceutical Co., Ltd. (Yamanouchi B.V.) | 1991 | R&D, manufacture and sales of medicines |
| | Yanmar Europe B.V. | Yanmar Diesel Corporation | 1988 | Manufacture and sales of diesel engines |
| | YKK Nederland B.V. | YKK Corp. (YKK Holding Europe B.V.) | 1964 | Manufacture and sales of slide fasteners |
| Yokogawa Europe B.V. | Yokogawa Electric Corporation | 1982 | R&D, manufacture and sales of recorders, controllers, analyzers and electronic measuring instruments | |
| Yokogawa Industrial Safety Systems B.V. | Yokogawa Electric Corporation | 1997 | R&D, design, manufacture and sales of safe instrumentation systems | |
| Belgium | AGC Automotive Europe S.A. | Asahi Glass Co., Ltd. (Glaverbel S.A.) | 1991 | R&D, manufacture and sales of glass for motor vehicles |
| | Ajinomoto Omnicem S.A./N.V. | Ajinomoto Co., Inc. | 1989 | R&D, manufacture and sales of medicines, bulk pharmaceuticals, intermediates products, tannic acids, surfactants for agriculture and agricultural chemical compounds |
| | Amano Electronics Europe,N.V. | Amano Electric Co., Ltd. | 1988 | R&D, design, manufacture and sales of time recorders, parking apparatuses and information apparatuses |
| | AW Europe S.A. | Aisin AW Co., Ltd., Aisin Seiki Co., Ltd. | 1990 | R&D, manufacture and sales of automatic transmissions for motor vehicles |
| | Bridgestone Europe S.A. | Bridgestone Corporation | 1990 | Manufacture of rubber products |
| | CMK Europe N.V. | CMK Corp., Sumitomo Bakelite Co., Ltd. | 1987 | Manufacture and sales of printed wiring boards for consumer use |
| | Daikin Europe N.V. | Daikin Industries, Ltd. | 1972 | R&D, manufacture and sales of air conditioners for general industrial use |
| | Eval Europe N.V. | Kuraray Co., Ltd., Kurare Europe GmbH | 1997 | R&D, manufacture and sales of EVOH resins (ethylene-vinyl alcohol copolymer resins) |
| | Flat Glass Company of the Asahi Glass Group | Asahi Glass Co., Ltd. | 1981 | R&D, manufacture and sales of sheet glass and processed glass (mirrors, tempered glass laminates, double glazing) |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|----------------------------------|---|--|---|---|
| Belgium | Fuji Hunt Photographic Chemicals N.V. | Fuji Photo Film Co., Ltd. | 1989 | Manufacture and sales of treatment chemicals for photos |
| | Fuji Oil Europe | Fuji Oil Co., Ltd., Fuji Oil (Singapore) | 1992 | R&D, manufacture and sales of vegetable oils and fats |
| | GC EUROPE N.V. | G. C. International Corporation | 1971 | Manufacture and sales of dental investment compounds |
| | Goldwell Belgium N.V. | Kao Corporation | 1989 | Manufacture of products for barbers and beauty parlors |
| | Gunze Plastics & Engineering Corporation of Europe N.V. | Gunze Ltd., Gunze Kobunshi Corp. | 1991 | Manufacture of resin films (for food packaging) |
| | Hishi Plastics Europe S.A. | Mitsubishi Plastics Industries Ltd., Mitsubishi Corp. | 1982 | Manufacture and sales of PVC products (extruded heat shrinkable tubes) |
| | Honda Belgium N.V. | Honda Motor Co., Ltd. | 1962 | Manufacture and sales of parts of two-wheel and four-wheel vehicles |
| | HOYA Lens Belgium N.V. | Hoya Corporation | 1999 | Manufacture and sales of lenses for glasses |
| | J.S.T. Europe N.V. | J.S.T. Mfg. Co., Ltd. | 1977 | Manufacture and sales of terminals and connectors |
| | JSR Micro N.V. | JSR Co., Ltd. | 1990 | R&D, manufacture and sales of photo-resists and allied chemicals |
| | Kaneka Belgium N.V. | Kaneka Corp., Mitsui & Co., Ltd. | 1970 | R&D, manufacture and sales of MBS resins, polyethylene foams, polypropylene, and modified silicones |
| | Kaneka Pharma Europe N.V. | Kaneka Corp., Kaneka Belgium N.V. | 1995 | Manufacture and sales of raw materials for medicines, etc. |
| | Kuwayama Europe N.V. | Kuwayama Inc. | 1995 | Manufacture and sales of rough stones and polished diamond |
| | Matsushita Battery Belgium N.V. | Matsushita Electric Industrial Co., Ltd., Matsushita Battery Industrial Co., Ltd. | 1970 | Design and manufacture of dry batteries and chargeable batteries |
| | MEC Europe N.V. | MEC Company Ltd. | 1993 | Manufacture and sales of copper surface treating agents |
| | Mutoh Europe N.V. | Mutoh Industries Ltd. | 1990 | Manufacture, import and sales of CAD-related apparatuses and designing and drafting apparatuses |
| | MYCOM EUROPE N.V./S.A. | Maekawa Mfg. Co., Ltd. | 1971 | Manufacture and sales of industrial freezers and various gas compressors |
| | NGK Ceramics Europe S.A. | NGK Insulators, Ltd. (NGK EUROPE S.A.) | 1985 | R&D and manufacture of catalyst carriers for treatment of motor vehicle emissions |
| | NGK Europe S.A. | NGK Insulators, Ltd. | 1977 | Manufacture and sales of insulators |
| | Nippon Shokubai Europe N.V. | Nippon Syokubai Co., Ltd. | 1999 | Manufacture and sales of highly water absorbable resins |
| | Nitto Europe N.V. | Nitto Denko Corporation | 1974 | R&D, manufacture and sales of industrial adhesive tapes and electric insulating tapes |
| | Parker Industries of Europe N.V. | Japan Parkerizing Co., Ltd., Parker Industries Inc., Parker Engineering Co., Ltd., Parker Arrestor Co., Ltd. | 1989 | R&D, manufacture and sales of rust preventive oils |
| | Pioneer Technology Belgium N.V. | Pioneer Corporation | 1976 | R&D and manufacture of car stereos |
| Press & Plat N.V. | Press Kogyo Co., Ltd. | 1992 | Manufacture of automotive parts | |
| Rotary Nozzle International S.A. | NKK Corp., TYK Ltd., Nihon Rotary Nozzle Co., Ltd. | 1976 | R&D, manufacture and sales of refractories, iron manufacturing machines and controllers | |
| Sun Chemical S.A. | Dainippon Ink and Chemicals, Inc. | 1986 | Manufacture and sales of printing inks | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---------------------|---|---|--------------------------|---|
| Belgium | SYSMEX Belgium S.A. | Sysmex Corporation | 1997 | R&D, manufacture and sales of medical care-related software and specimen testing apparatuses |
| | Terumo Europe N.V. | Terumo Corporation | 1971 | Manufacture and sales of medical appliances and medicines |
| | Tosoh Bioscience N.V. | Tosoh Corporation, Tosoh Europe | 1990 | Manufacture and sales of clinical diagnostic apparatuses and reagents |
| | Toyoda-Koki Automotive Torsen Europe S.A. | Toyoda Machine, Ltd. | 1989 | Manufacture and sales of automotive parts (differential gears) |
| | Yamauchi Corporation N.V. | Yamauchi Corporation | 1988 | Manufacture of molded precision resin articles |
| | YKK Belgium N.V. | YKK Corp. (YKK Holding Europe B.V.) | 1970 | Manufacture and sales of fasteners, Hook-and-Loop fasteners and notions |
| Luxembourg | Dupont Teijin Films Europe S.A. | Teijin Ltd. | 1991 | R&D, manufacture and sales of polyester films for audio and video products |
| | TDK Recording Media Europe S.A. | TDK Corporation (TDK Europe S.A.) | 1989 | Manufacture and sales of audio and video cassette tapes and optical disks, and sales of other recording media |
| Ireland | Alps Electric (Ireland) Ltd. | Alps Electric Co., Ltd. | 1988 | Manufacture of car-mounted parts for electric devices (heater control panels and door modules), keyboards and RF modulators |
| | Buffalo Technology Ireland | Melco Inc. | 1998 | Subcontract processing for manufacture of peripheral apparatuses of computers |
| | Carten Controls Ltd. | Fujikin, Inc. | 1981 | Manufacture of flow valves and flow controllers for semiconductor manufacturing equipment |
| | Docu soft Ltd. | Design Automation, Inc. | 1991 | Manufacture and sales of CAD and CAM software |
| | Fujisawa Ireland, Ltd. | Fujisawa Pharmaceutical Co., Ltd. (Fujisawa Holland B.V.) | 1990 | Manufacture and sales of novel immunosuppressive agents |
| | Hitachi Koki Europe Ltd. | Hitachi Koki Co., Ltd. | 1995 | Manufacture of power tools |
| | HITACHI Printing Solutions Europe | Hitachi Koki Co., Ltd. | 1990 | Manufacture and sales of printers for computers and copiers |
| | I.O. Systems Ltd. | Okamoto Systems Ltd. | 1995 | Manufacture of conveyor belts and material handling |
| | INX International Ink Company | Sakata Inx Corporation | 1979 | Manufacture and sales of printing inks |
| | Klinge Pharma & Co. | Fujisawa Pharmaceutical Co., Ltd., Klinge Holdings | 1984 | Manufacture and sales of medicines |
| | NEC Semiconductors Ireland Ltd. | NEC Corporation | 1976 | Manufacture of ICs |
| | Neriki Europe Ltd. | Neriki Valve Co., Ltd., J. Gerber & Co., (Japan) Ltd. | 1995 | Manufacture of cylinder valves for high-pressure gases (industrial gases) |
| | Ohshima (Ireland) Ltd. | Ohshima Kogyo Co., Ltd., Ohtec Co., Ltd. | 1989 | Manufacture and sales of AV parts and VTR parts |
| | OKURA AUTOMATION IRL Ltd. | Okura Yusoki Co., Ltd. | 1991 | Manufacture and sales of conveyors |
| | Olympus Diagnostica GmbH (Irish Branch) | Olympus Corporation | 1989 | R&D and manufacture of chemicals for diagnostic purposes |
| | Ophtecs Euro Ltd. | OPHTECS Corporation | 2002 | Manufacture and sales of contact lens care products and ophthalmological medicines |
| | PGM Ballscrews Ireland Ltd. | THK Co., Ltd. | 1992 | Manufacture of ball screws (machine parts) |
| | RyuSyO Industrial Co., (Ireland) Ltd. | RyuSyO Industrial Co., Ltd. | 1989 | Manufacture of parts for electronic apparatuses |
| Takeda Ireland Ltd. | Takeda Chemical Industries, Ltd. | 1997 | Manufacture of medicines | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|------------------------------------|--|--|---|--|
| Ireland | Uchiya Ireland Ltd. | Uchiya Thermostat Co., Ltd., Uchiya Hong Kong Limited | 1993 | Manufacture and sales of thermostats (for household electric appliances) |
| | Yamanouchi Ireland Co.,Ltd. | Yamanouchi Pharmaceutical Co., Ltd. (Yamanouchi B.V.) | 1986 | Manufacture and sales of medicines (famotidine, formoterol fumarate, nifedipine hydrochloride and tamsulosin hydrochloride) |
| Spain | Dalhimetal España, S.A. | Nihon Plast Co., Ltd. | 1929 | R&D, design, manufacture and sales of automotive parts |
| | A.P.Amortiguadores,S.A. | Kayaba Industry Co., Ltd. | 1983 | R&D, design, manufacture and sales of shock absorbers |
| | Aceites Esenciales y Derivados S.A.(ACEDESA) | Takasago International Corporation | 1988 | R&D, manufacture and sales of perfumes and flavors for cosmetics, soaps, foods, etc. |
| | ACERINOX,S.A. | Nisshin Steel Co., Ltd., Metal One Corp. | 1970 | R&D, design, manufacture and sales of stainless steel |
| | AMR Refractarios,S.A. | Krosaki Harima Corporation | 1989 | Manufacture and sales of refractory bricks |
| | Asahi Vet,S.A. | Asahi Kasei Pharma Corporation | 1988 | Manufacture and sales of medicines for animals and feed additives |
| | Barberet & Blanc, S.A. | Kirin Brewery Co., Ltd. (Kirin Agribio B.V.) | 1994 | R&D, manufacture and sales of carnation seeds and seedlings |
| | Bridgestone Hispania,S.A. | Bridgestone Corp. (Bridgestone Europe, NV/SA) | 1988 | Manufacture and sales of tires and industrial rubber products |
| | Calsonic Kansei Spain,S.A. | Calsonic Kansei Corp. (Calsonic Kansei Europe plc) | 1991 | Manufacture and sales of car air conditioners, car heaters and heat exchangers |
| | Componentes Hirotec,S.A.U. | Hirotec Corporation | 2002 | Assembly and manufacture of automotive parts (doors, hoods, lift gates) |
| | Cotisa Tintas,S.L | Dainippon Ink and Chemicals, Inc. (Sun Chemical, S.A.) | 1997 | Manufacture of printing inks |
| | Daicolorchem EU,S.A. | Dainichiseika Color & Chemicals Mfg. Co., Ltd. | 1989 | Manufacture and sales of organic and inorganic pigments, import and sales of chemical products, and R&D (only pigments) |
| | Denso Barcelona,S.A. | Denso Corp. (Denso International Europe B.V.) | 1989 | Manufacture of electronic parts and engine control parts for motor vehicles |
| | Denso Sistemas Térmicos España,S.A. | Denso Corp. (Denso Thermal Systems, S.p.A.) | 2004 | Manufacture and sales of car air conditioner- and radiator-related products |
| | DIC Coatings,S.L. | Dainippon Ink and Chemicals, Inc. | 1998 | R&D, manufacture and sales of can coating materials and metallic inks |
| | Ebara España Bombas,S.A. | Ebara Corporation | 1990 | Design, manufacture and sales of industrial pumps |
| | EM Research Organization,Inc. Europe Branch | EM Research Organization, Inc. | 1998 | Manufacture and sales of soil conditioning microbes |
| | Esteban Ikeda,S.A. | Nissan Motor Co., Ltd., (Nissan Motor Ibérica, S.A.), Johnson Controls Automotive Systems, Corp. | 1990 | Manufacture and sales of automotive seats |
| | Fujitsu Manufacturing España,S.A. | Fujitsu Ltd. | 1973 | R&D, manufacture and sales of information processing apparatuses, communication apparatuses, and automobile-related electronic apparatuses and customization of ATMs |
| | Fundimotor/Mecobusa,S.A. | Nissan Motor Co., Ltd. | 1976 | Manufacture of engine parts |
| Gallardo Dance,S.L. | Excel. Co., Ltd. | 1997 | Manufacture and sales of flamenco shoes | |
| Glapilk,A.I.E.(Horno Flot) | Asahi Glass Co., Ltd. | 1998 | Manufacture of sheet glass | |
| Gousei Ibérica,S.A. | Nakagawa Electric Ind. Co., Ltd. | 1996 | Manufacture and sales of molded plastic parts | |
| GSB-TBK Automotive Components,S.L. | Tokyo Buhin Kogyo Co., Ltd. | 2002 | Manufacture and sales of automotive oil and water pumps | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|------------------------|---|--|--|--|
| Spain | Hebron,S.A. | Otsuka Chemical Co., Ltd. | 1989 | Manufacture and sales of chemical products |
| | Hitachi Air Conditioning Products Europe,S.A. | Hitachi Air Conditioning Systems Co., Ltd. | 1991 | Manufacture and sales of business-use air conditioners |
| | Hoya Lens Iberia,S.A. | Hoya Corp. (Hoya Lens Europe N.V.) | 1978 | R&D and manufacture of lenses for glasses |
| | Ibérica de Suspensiones,S.L. | NHK Spring Co., Ltd., Sojitz Corp. | 2004 | Manufacture and sales of coil springs and stabilizers for motor vehicles |
| | INGEMAT,S.A. | Hirotec Corporation | 1986 | R&D, design, manufacture and sales of jigs and devices for assembling motor vehicles |
| | Kanaflex España,S.A. | Kanaflex Corporation | 1983 | Manufacture and sales of plastic and rubber hoses |
| | Kanase España,S.A. | Kanase Industries Co., Ltd. | 1970 | Manufacture and sales of synthetic resin button blanks |
| | Kao Corporation,S.A. | Kao Corporation | 1970 | R&D, manufacture and sales of salts for softening agents, raw materials for perfumes and cosmetics and perfumes |
| | Katsuyama Europe,S.A. | Katsuyama Kikai, Ltd. | 1999 | R&D, design, manufacture and sales of building maintenance supplies (gondolas) |
| | Kayaba Spain,S.A. | Kayaba Industry Co., Ltd. | 1996 | Manufacture and sales of power steering pumps for motor vehicles |
| | Kitz Corporation of Europe,S.A. | KITZ Corporation | 1991 | Manufacture, sales and marketing of valves |
| | Kubota España,S.A. | Kubota Corporation | 1994 | Import of agricultural tractors, mounting and sales of tires, seats and other parts, sales of repair parts and provision of aftersales service |
| | Matsushita Electric España,S.A. | Matsushita Electric Industrial Co., Ltd. | 1973 | R&D, manufacture and sales of vacuum cleaners |
| | Miracle Coating Europe, S.A. | Mitsubishi Materials Kobe Tools Corp., Mitsubishi Materials España, S.A. | 2000 | Cemented carbide tools coating business |
| | Mitsubishi Materials España,S.A. | Mitsubishi Materials Corporation | 1974 | Manufacture and sales of cemented carbide tools |
| | Montesa Honda,S.A. | Honda Motor Co., Ltd. | 1986 | Manufacture and sales of two-wheel vehicles and repair parts |
| | Muelles y Ballestas Hispano-Alemanas,S.A. | NHK Spring Co., Ltd., Sojitz Corp." | 1963 | Manufacture and sales of plate springs for motor vehicles |
| | Nachi Industrial,S.A. | Nachi-Fujikoshi Corporation | 1976 | Manufacture and sales of ball bearings and needle bearings, and import and sales of other bearings |
| | Nakagawa España,S.A. | Nakagawa Electric Ind. Co., Ltd. | 1993 | Manufacture and sales of household electric appliance parts |
| | Nifco Products España,S.L. | Nifco Inc. | 2000 | R&D, design, manufacture and sales of plastic automotive parts |
| | Nissan Forklift España,S.A. | Nissan Forklift Europe B.V. | 1995 | Design, manufacture and sales of forklifts |
| | Nissan Motor Ibérica,S.A. | Nissan Motor Co., Ltd., Nissan Europe N.V. | 1980 | R&D, manufacture and sales of passenger and commercial-use cars, four-wheel drive cars and engines |
| | Nissan Vehículos Industriales,S.A. | Nissan Motor Co., Ltd. (Nissan Motor Ibérica S.A.) | 1994 | R&D, manufacture and sales of small- and medium-size trucks and vans |
| | Productos Electrónicos del Baño, ROCA-INAX,S.A. | INAX Corporation | 1991 | Manufacture and sales of toilet seats with a warm-water washer |
| Riken España, S.A. | Riken Co., Ltd. | 1981 | Manufacture and sales of seal rings and piston bands | |
| Sakata Inx España,S.A. | Sakata Inx Corporation | 1987 | R&D, manufacture and sales of printing inks | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|--------------------|---|--|--|---|
| Spain | Sanyo España,S.A. | Sanyo Electric Co., Ltd. (Sanyo Fisher sales) | 1969 | Manufacture and sales of color TVs and R&D and sales of other consumer apparatuses |
| | Sharp Electrónica España,S.A. | Sharp Corporation | 1986 | Manufacture and sales of color TVs and R&D and sales of household electric appliances and information commodities |
| | Shionogi Qualicaps,S.A. | Shionogi & Co., Ltd., Shionogi Europe B.V. | 1992 | Manufacture and sales of capsules (gelatin and cellulose) |
| | Showa Europe,S.A. | Showa Corporation | 1990 | R&D, manufacture and sales of shock absorbers for two-wheel vehicles |
| | SMC España,S.A. | SMC Corporation | 1990 | Manufacture and sales of pneumatic apparatuses and parts |
| | Sony España,S.A. | Sony Corporation | 1972 | Design, manufacture and sales of color TVs |
| | Sumitomo Bakelite Europe (Barcelona) S.L. | Sumitomo Bakelite Co., Ltd. (Sumitomo Bakelite Europe, N.V.) | 2003 | R&D, manufacture and sales of industrial phenol resins |
| | Sun Chemical,S.A. | Dainippon Ink and Chemicals, Inc. | 1986 | Manufacture and sales of printing inks |
| | Suzuki Manufacturing Spain,S.A. | Suzuki Motor España, S.A. | 1993 | Manufacture and sales of parts for two- and four-wheel vehicles |
| | Suzuki Motor España,S.A. | Suzuki Motor Corporation | 1984 | Manufacture and sales of autobicycles and parts thereof |
| | Tedec Meiji Farma,S.A. | Meiji Seika Kaisha, Ltd. | 1991 | Manufacture and sales of medicines |
| | Terasaki España,S.A.U. | Terasaki Electric Co., Ltd. | 1987 | R&D, design, manufacture and sales of industrial circuit breakers |
| | Textil Celrá,S.A. | Kondo Cotton Spinning Co., Ltd., Marubeni Corp. | 1987 | Manufacture and sales of cotton yarns |
| | UBE Chemical Europe,S.A. | Ube Industries, Ltd. (Ube Corporation Europe, S.A.) | 1967 | R&D, manufacture and sales of caprolactam, ammonium sulfate and fine products (1 · 6HD, DDA, MEKO, etc.) |
| | UBE Engineering Plastics,S.A. | Ube Industries, Ltd. (Ube Corporation Europe, S.A.) | 2001 | R&D, manufacture and sales of nylon |
| | Yamaha Motor España,S.A. | Yamaha Motor Co., Ltd., Yamaha Motor Europe N.V. | 1981 | Manufacture and sales of two-wheel vehicles and R&D and sales of marine products and ATVs (four-wheel buggy vehicles) |
| YKK España,S.A. | YKK Corporation | 1970 | Manufacture and sales of auxiliary sewing materials (fasteners, buttons, etc.) | |
| Y-TEC Europa, S.A. | Yamashita Rubber Co., Ltd. | 1999 | Manufacture and sales of rubber vibration isolators for motor vehicles | |
| Italy | Achille Pinto S.p.A. | Mitsui & Co., Ltd., Toray Industries, Inc. | 1959 | Manufacture and sales of printed fabrics |
| | AIDA S.r.l. | Aida Engineering, Ltd. | 2004 | Manufacture and sales of presses |
| | Air GUNSA S.r.l. | Anest Iwata Corporation | 1997 | Manufacture of coating machines |
| | Ajinomoto Italia/ Bioitalia S.p.A. | Ajinomoto Co., Inc. | 1990 | R&D and manufacture of lysine for feed |
| | Akzo Nobel Nippon Paint SRL | Nippon Paint Co., Ltd. | 1999 | Manufacture and sales of coating materials for coil coating |
| | Alcantara S.p.A. | Toray Industries, Inc., Mitsui & Co., Ltd. | 1974 | R&D, design, manufacture and sales of microfiber products |
| | Arcotronics Italia S.p.A. | Nissei Electric Co., Ltd. | 1990 | Manufacture and sales of film capacitors |
| | Asahi Thermofil Italia SRL | Asahi Kasei Corporation | 1998 | Manufacture of products for business in the U.K. and France |
| | ATOP S.p.A. | Odawara Engineering Co., Ltd. | 1993 | Manufacture of machines |
| | BRIDGESTONE / FIRESTONE ITALIA S.P.A. | Bridgestone Corp. (Bridgestone / Firestone Europe S.A.) | 1989 | Manufacture and sales of tires for passenger and commercial-use cars |

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|---|--|--|--|---|
| Italy | Bridgestone Metalpha Italia S.p.A. | Bridgestone Corporation | 1996 | Manufacture and sales of steel cords for tires |
| | Costruzione Italiana Apparecchi Precisione (CIAP) S.R.L. | Honda Italia, Yamada Manufacturing Co., Ltd. | 1980 | Manufacture and sales of motorcycle parts (change gear mechanisms) |
| | DENSO MANUFACTURING ITALIA S.p.A. | Denso Corporation | 1999 | R&D, manufacture and sales of alternators, starters and small motors for motor vehicles |
| | Denso Thermal Systems S.p.A. | Denso Corporation | 2001 | Manufacture of car air conditioners and radiators |
| | DNP Photomask Europe S.p.A. | Dai Nippon Printing Co., Ltd. | 2003 | Manufacture of photomasks |
| | Ebara-Pumps Europe S.p.A. | Ebara Corporation | 1988 | R&D, manufacture and sales of general-purpose and industrial pumps |
| | Emblem Europe S.p.A. | Marubeni Corporation | 1988 | Manufacture and sales of nylon films for food packaging |
| | Eurogenetics Italia SRL | Tosoh Bioscience | 1994 | Manufacture and sales of clinical diagnosis equipment and in vitro diagnostics |
| | Fiamm GS S.p.A. | Japan Storage Battery Co., Ltd. | 1988 | Manufacture and sales of small seal lead acid batteries |
| | Fiat Kobelco Construction Machinery S.p.A. | Kobelco Construction Machinery Co., Ltd., Sumitomo Corp. | 2002 | Design, manufacture and sales of construction machines |
| | Fiat-Hitachi Excavators S.p.A. | Kobelco Construction Machinery Co., Ltd., Sumitomo Corp. | 1986 | Design, manufacture and sales of construction machines |
| | Fisat S.p.A. | Dainippon Ink and Chemicals, Inc. | 1989 | Manufacture and sales of printing inks |
| | Fujisawa SRL | Fujisawa Pharmaceutical Co., Ltd. | 1993 | Manufacture and sales of medicines |
| | Gibo'co S.p.A. | Onward Kashiya Co., Ltd. | 1994 | Manufacture and sales of men's and women's clothing |
| | Glaverbel Italy S.R.L. | Asahi Glass Co., Ltd. | 1998 | Manufacture and sales of float glass, mirrors and processed glass for motor vehicles |
| | Honda Italia Industriale S.p.A. | Honda Motor Co., Ltd. | 1977 | Manufacture and sales of 50-650cc motorcycles and engines |
| | Hoya Lens Italia S.p.A. | Hoya Corporation | 1982 | Manufacture and sales of optical equipment |
| | IHI Charging System International S.p.A. | Ishikawajima-Harima Heavy Industries Co., Ltd. | 1995 | Manufacture of superchargers for motor vehicles |
| | Imer Nissei S.p.A. | Nissei Build Kogyo Co., Ltd. | 1991 | Manufacture of multilevel parking garages |
| | Industria Cuscinetti S.p.A. | NSK Ltd. (NSK-RHP Europe Ltd) | 1969 | Manufacture and sales of bearings |
| | Italpet Preforme S.p.A. | Marubeni Corporation | 1995 | R&D and manufacture of resins for PET bottles |
| | Italpneumatica Sud SRL | SMC Corporation | 1990 | Manufacture of pneumatic apparatuses |
| | Komatsu Utility Europe S.p.A. | Komatsu Manufacturing Co., Ltd. | 1995 | Manufacture and sales of miniature construction machines, such as miniature shovels and miniature wheel loaders |
| | Marghera Butadiene S.p.A. | Mitsui & Co., Ltd., Nihon Zeon Co., Ltd. | 1985 | Manufacture and sales of butadiene |
| Matsushita Electric Works Electronic Materials (Italy) S.p.A. | Matsushita Electric Works Electronic Materials (Europe GmbH) | 2000 | Manufacture of wire materials for printed boards | |
| Miteni S.p.A. | Mitsubishi Corp., Mitsubishi Materials Corporation (Tochem Products Co., Ltd.) | 1988 | R&D, manufacture and sales of medicines and agricultural intermediates | |
| Mitsuba F.N.Europe S.p.A. | Mitsuba F.N. Europe S.p.A. | 1990 | Manufacture of electric devices for two-wheel vehicles (starters, ACGs, CDIs and regulators) | |
| Motori Minarelli S.p.A. | Yamaha Motor Co., Ltd. | 1967 | Manufacture of engines for two-wheel vehicles | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|-------------------------|---|--|---|---|
| Italy | Nidek Technologies s.r.l. | Nidek Co., Ltd. | 1998 | R&D, manufacture and sales of ophthalmologic instruments |
| | Olivetti Canon Industriale | Canon Inc. | 1987 | R&D and manufacture of copiers |
| | Onward Italia S.p.A. | Onward Kashiya Co., Ltd. | 1974 | Manufacture and sales of men's and women's clothing |
| | Oshino Lamps Italia SRL | Oshino Lamps Limited | 1990 | Manufacture of illumination lamps for motor vehicles, railways, etc. |
| | Resindion S.r.l. | Mitsubishi Chemical Corporation | 1989 | Manufacture and sales of ion exchange resins |
| | Roland Europe S.p.A. | Roland Co., Ltd. | 1976 | Manufacture of electronic musical instruments |
| | Sanyo Argo Clima S.r.l. | Sanyo Electric Co., Ltd., Sumitomo Corp., Sumitomo Corporation Italia S.p.A. | 1991 | R&D and manufacture of air conditioners |
| | Sea Utensili Diamantati S.p.A. | Disco Corporation | 1974 | Manufacture and sales of diamond tools |
| | Sews-Cabind S.p.A. | Sumitomo Electric Industries, Ltd., Sumitomo Wiring Systems Ltd., Sumitomo Corp. | 2001 | Manufacture and sales of wire harnesses for motor vehicles |
| | Shimano Italia S.p.A. | Shimano Inc. (Shimano Singapore Pte Ltd.) | 1990 | R&D, manufacture and sales of bicycle parts |
| | Shinto Italia S.p.A. | Shinto Industrial Co., Ltd. | 1984 | Manufacture and sales of lance pipes |
| | SMC Italia S.p.A. | SMC Corporation | 1977 | Manufacture and sales of air compressors |
| | Societa' Belgarda S.p.A. | Yamaha Motor Co., Ltd. (Yamaha Motor Europe) | 1980 | R&D, manufacture and sales of two-wheel vehicles |
| | Sony Italia S.p.A. | Sony Corporation | 1981 | Manufacture, sales and marketing of consumer electrics |
| | Star Automation Europe S.p.A. | Star Seiki Co., Ltd. | 1989 | Manufacture of FA equipment |
| | Sumoto SRL | Ebara Corporation | 1981 | Manufacture and sales of submersible motors for deep wells |
| | Sun Chemical,S.p.A. | Dainippon Ink and Chemicals, Inc., Sun Chemical | 1980 | Manufacture and sales of printing inks |
| | Takeda Italia Farmaceutici S.p.A. | Takeda Chemical Industries, Ltd. | 1982 | R&D, manufacture and sales of medicines |
| | Takihyo Italia S.p.A. | Takihyo Co., Ltd. | 1996 | Purchase of plain cloth, finding of makers, information collection and planning and manufacture of original commodities |
| | Tesio Radiatori S.p.A. | T. RAD Co. Ltd. | 2001 | Manufacture and sales of heat exchangers |
| | TMI Europe S.p.A. | Teijin Ltd., ITOCHU Corp., ITOCHU Italiana S.p.A. | 1994 | R&D, manufacture and sales of woven fabrics of long polyester fibers |
| | TOK Italia S.p.A. | Tokyo Ohka Kogyo Co., Ltd. | 1995 | R&D and manufacture of photo-resists for printed boards |
| | Toyo Tanso Europe S.p.A. | Toyo Tanso Co., Ltd. | 1997 | R&D, manufacture and sales of carbon products |
| | Vegitalia S.p.A. | Kagome Co., Ltd. | 2004 | Manufacture and sales of frozen vegetables |
| | VENDO (ITALY) S.p.A | Sanden Corp. (Vendo Europe Inc.) | 1990 | R&D, design, manufacture and sales of automatic vending machines |
| | Yanmar Italy S.p.A. | Yanmar Diesel Corporation | 1996 | R&D, manufacture and sales of diesel engines |
| YKK Italia S.p.A. | YKK Corp. (YKK Holding Europe B.V.) | 1968 | Manufacture and sales of fasteners | |
| YKK Mediterraneo S.p.A. | YKK Corp. (YKK Holding Europe B.V.), YKK Italia S.p.A., YKK (France) S.A.R.L./YKK (Deutschland) GmbH/YKK (Nederland) B.V. | 1977 | Manufacture and sales of fastener parts | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---------------|--|---|---|--|
| Italy | YSI S.p.A | YKK Corporation | 1990 | Manufacture and sales of metal notions |
| Finland | Jujo Thermal Oy | Nippon Paper Industries Co., Ltd., Mitsui & Co., Ltd. | 1992 | R&D, manufacture and sales of thermosensitive paper |
| | Misawa Home of Finland Oy | Misawa Homes Co., Ltd., Misawa Ceramics Corp., Yamanashi Housing Industries Co., Ltd. | 1994 | Manufacture of house building materials |
| | Nana Europe Oy | Nanatanigawa Lumber Industries Co., Ltd. | 1996 | R&D and manufacture of house building materials |
| | Oy Shinshowa Finland Ltd. | Shinshowa Co., Ltd. | 2001 | Manufacture of house building materials |
| | Santen Oy | Santen Pharmaceutical Co., Ltd. | 1997 | Manufacture and sales of ophthalmologic medicines |
| | Sunarrow Finland Oy | Sunarrow Limited | 2002 | Manufacture of parts for cellular phones |
| Norway | Reichhold A.S. | Dainippon Ink and Chemicals, Inc. (Reichhold Holding A.S.) | 1997 | Manufacture and sales of unsaturated polyesters |
| Sweden | Akzo Nobel Nippon Paint AB | Nippon Paint Co., Ltd. | 1999 | Manufacture and sales of coating materials for coils |
| | Anritsu AB | Anritsu Corporation | 1996 | Manufacture and sales of communication relays |
| | BT Industries AB | Toyota Industries Corporation | 2000 | R&D, manufacture and sales of indoor transport machines |
| | Fuji Autotech AB | Fuji Kiko Co., Ltd. | 1993 | R&D, design, manufacture and sales of parts for trucks and passenger cars |
| | Hagby-Asahi AB | Asahi Diamond Industrial Co., Ltd. | 1989 | Design, manufacture and sales of diamond tools |
| | Hoya Lens Sweden AB | Hoya Corporation | 1978 | R&D, manufacture and sales of lenses for glasses |
| | Motoman Robotics Europe AB | Yaskawa Electric Corporation | 1984 | Design, manufacture and sales of robot systems |
| | Ohlins Racing AB | Yamaha Motor Co., Ltd. | 1987 | R&D, design, manufacture and sales of shock absorbers |
| | PP Press & Platgruppen AB | Press Kogyo Co., Ltd. | 1992 | Manufacture of automotive parts |
| | SEIBU GIKEN DST AB | Seibu Giken Co., Ltd. | 1993 | Design, manufacture and sales of dehumidifiers, total enthalpy heat exchangers and VOC concentrators |
| | SiTek Electro Optics AB | Autex Inc. | 1984 | R&D, design, manufacture and sales of electronic position-measuring parts |
| | SMC Pneumatics Sweden AB | SMC Corporation | 1986 | Manufacture of technical atmosphere parts |
| | Sony Ericsson Mobile Communications AB | Sony Corporation | 2001 | R&D and manufacture of cellular phones |
| | Stensele Sag i Storman AB | Komatsu Forest AB | 2003 | Manufacture of forestry machines |
| Tomoku Hus AB | Tomoku Co., Ltd., Sweden House Co., Ltd., Mitsubishi Corp. | 1991 | R&D, manufacture and sales of housing members | |
| Denmark | DNP Denmark A/S | Dai Nippon Printing Co., Ltd. | 1989 | Manufacture and sales of screens for projection TV sets |
| | Envotech OHM Engineering Aps | OHM Electric Co., Ltd. | 1997 | R&D and manufacture of wastewater treatment devices |
| | Frisa Planter A/S | Sakata Seed Corporation | 2003 | Cultivation and sales of flowering plants |
| | KOKI EUROPE A/S | Koki Company Ltd. | 2001 | Manufacture and sales of solder pastes and post-fluxes (surface-mounted soldering materials) |
| | OFS-FITEL I/S | Furukawa Electric Co., Ltd. | 2001 | R&D and manufacture of optical fibers |
| | Sakata Ornamentals Europe A/S | Sakata Seed Corporation | 2003 | R&D, manufacture and sales of flower seeds |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|----------|---|---|----------------|---|
| Denmark | Sun Chemical A/S | Dainippon Ink and Chemicals, Inc. | 1990 | Manufacture and sales of printing inks, coating materials and dyes |
| | YKK Danmark A/S | YKK Corporation | 1982 | Manufacture and sales of fasteners |
| Austria | Amada Austria GmbH | Amada Co., Ltd. | 1986 | Manufacture and sales of metal molds for metal sawing machine blades and press brakes |
| | Fischer GmbH | Kanematsu Co., Ltd., Kanematsu Deutschland, Goldwin Inc. | 1992 | R&D, design, manufacture and sales of sporting goods |
| | HORIBA GmbH | Horiba, Ltd. (HORIBA Europe GmbH) | 1992 | Design, manufacture and sales of air pollution measuring instruments |
| | LAMCO Holzverarbeitungsges.m.b.H | Meiken Lamwood Corporation | 1997 | Manufacture and sales of wooden building materials |
| | Matsushita Electric Works Electronic Materials(Europe) GmbH | Matsushita Electric Works, Ltd. | 2000 | Manufacture and sales of laminates for multilayer printed boards |
| | Reichhold Chemie GmbH | Dainippon Ink and Chemicals, Inc. | 1943 | R&D, design, manufacture and sales of synthetic resins, etc. |
| | SMC Pneumatik GmbH | SMC Corporation | 1978 | Manufacture and sales of pneumatic apparatuses |
| | Sony DADC Austria AG | Sony Corp. (Sony Corporation of America) | 1986 | Manufacture and sales of optical disks |
| | Sun Chemical A.G. | Dainippon Ink and Chemicals, Inc. | 1992 | Manufacture of printing inks |
| | YKK (Austria) GmbH | YKK Corporation | 1975 | Manufacture and sales of fasteners |
| Portugal | CABELAUTO- Cabos para Automóveis, S.A. | Sumitomo Wiring Systems, Ltd., Sumitomo Wiring Systems Europe, Ltd., Sumitomo Corp. UK Plc., Sumitomo Corp. | 1992 | Manufacture and sales of electric wires |
| | Companhia Industrial de Resinas Sintéticas, CIRES, S.A." | Shin-Etsu Chemical Co., Ltd., Mitsui & Co., Ltd. | 1960 | Manufacture and sales of vinyl chloride polymer |
| | FISIPE- Fibras Sintéticas de Portugal, S.A. | Mitsubishi Corp., Mitsubishi Rayon Co., Ltd., Mitsubishi International (Germany) | 1973 | Manufacture and sales of acrylic fibers |
| | JOROGASO- Indústria Portuguesa de Equipamentos para Automóveis, Lda. | Press Kogyo Co., Ltd. | 1998 | Manufacture and sales of fuel tanks, chassis parts and bumpers |
| | MITSUBISHI FUSO TRUCK EUROPE - Sociedade Europeia de Automoveis, S.A. | Mitsubishi Motors Corporation | 1990 | Manufacture and sales of commercial-use cars |
| | NEC Portugal - Telecomunicações e Sistemas, S.A. | NEC Corporation | 1995 | R&D, manufacture, sales and maintenance of communication-related apparatuses (telephone exchanges, telephone sets, carrier apparatuses and radio communication apparatuses) |
| | Nemoto Portugal-Química Fina, Lda. | Nemoto & Co., Ltd., Sojitz Corp. | 1990 | R&D, manufacture and sales of inorganic and fluorescent pigments |
| | PIONEER Technology Portugal, S.A | Pioneer Corp. (Pioneer Technology Belgium N.V., Pioneer Europe N.V.) | 1995 | Manufacture of car stereos and CD products |
| | Salvador Caetano, I.M.V.T., S.A. | Toyota Motor Corporation | 1971 | Design and assembling of bus bodies, automotive parts and commercial-use cars (Toyota cars) |
| | Shotic Europa-Indústria de Alumínio, Lda. | Showa Denko K.K. | 1998 | Manufacture of compressor parts (forged and molded aluminum parts) for car air conditioners |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|-------------|---|---|----------------|---|
| Portugal | Sun Chemical Portugal-Tintas Gráficas, Unipessoal, Limitada | Dainippon Ink and Chemicals, Inc. | 1989 | Manufacture and sales of printing inks |
| | Taiyo Technology Portugal, Lda. | Taiyo Manufacturing Co., Ltd. | 2002 | Manufacture and sales of panels for car stereos, panels for cellular phones, etc. |
| | TESCO - Componentes para Automóveis, Lda. | METTS Corporation, EUTIC | 1993 | Manufacture and sales of diecast aluminum products |
| | Textil Tsuzuki, Lda.. | Tsuzuki Spinning Co., Ltd., Ofukogyo Co., Ltd., Tsuzuki Co., Ltd. | 1988 | Manufacture and sales of cotton yarns |
| | Uchiyama Portugal Vedantes, Lda. | Uchiyama Manufacturing Corp., Uchiyama America Inc. | 1996 | Manufacture of rubber and galvanized bearing seals |
| | Yazaki Saltano de Ovar, P.E., Lda. | Yazaki Corporation | 1992 | Manufacture of low-voltage electric wires for motor vehicles |
| | Yazaki Saltano de Portugal, C.E.A., Lda. | Yazaki Corporation | 1986 | Manufacture of wire harnesses for motor vehicles |
| | YKK Portugal, Lda. | YKK Corp., YKK France Sarl. | 1981 | Manufacture and sales of metal buttons and Hook-and-Loop fasteners |
| Switzerland | JT International S.A. | Japan Tobacco Inc. | 1999 | Manufacture and sales of tobacco products |
| | Sun Chemical AG (S.A., LTD) | Dainippon Ink and Chemicals, Inc. (Sun Chemical Group B.V.) | 1992 | Manufacture and sales of printing inks |
| Greece | Hellenic Steel Company | Marubeni-Itochu Steel Europe GMBH | 1972 | Manufacture and sales of cold drawn products, tinplates, galvanized steel plates, etc. |
| | Miyama. Hellas Ltd. | Miyama Corporate Group | 2002 | Manufacture and sales of iron and steel products for sewage systems |
| | Tosoh Hellas A.I.C. | Tosoh Corp., Mitsubishi Corp. | 1973 | R&D and manufacture of electrolytic manganese dioxide |
| | Y.K.K. Hellas A.E.B.E. | YKK Corp., YKK Holding Europe | 1983 | Manufacture and sales of fastener products |
| Poland | ACCUROMM Central Europe Sp.z o.o. | Fuji Seiko Ltd. | 2004 | Manufacture of cemented carbide tools, etc. |
| | Ajinomoto Poland Sp.z o.o. | Ajinomoto Co., Inc. | 1999 | Manufacture and sales of instant noodles |
| | AKS PRECISION BALL POLSKA Sp.z o.o. | Amatsuji Steel Ball Mfg. Co., Ltd. | 2002 | Manufacture of steel balls for bearings |
| | Bridgestone Diversified Products Poland Sp.z o.o. | Bridgestone Corporation | 2004 | Manufacture of rubber crawlers for construction vehicles |
| | Bridgestone Poland Sp.z o.o. | Bridgestone Corporation | 1998 | Manufacture of radial tires for passenger cars |
| | Calsonic Kansei Poland Sp.z o.o. | Calsonic Kansei Corporation | 1997 | Manufacture of car heaters |
| | CARBO TOKA Sp.z o.o. | Hokkaido Toka Fine Technic Co., Ltd. | 1995 | Development, manufacture, service and sales of gas meter devices |
| | Daicel Safety Systems Europe Sp.z o.o. | Daicel Chemical Industries, Ltd. | 2004 | Manufacture of inflators for air bags for motor vehicles |
| | Danfoss Saginomiya Sp.z o.o. | Saginomiya Seisakusho, Inc. | 2002 | Manufacture and sales of small pressure switches for air conditioners, and sales of control equipment for freezers and air conditioners |
| | DENSO Manufacturing Polska Sp.z o.o. | Denso Corporation | 1999 | Manufacture and sales of small motors |
| | DENSO THERMAL SYSTEMS POLSKA Sp.z o.o. | Denso Corporation | 2001 | Manufacture and sales of heaters and cockpit modules |
| | Euro Comfort Sp.z o.o. | Bic Camera Co., Ltd. | 1995 | Collection, refining and export of feathers, and manufacture of feather bedding |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---------------------------------|---|--|--|--|
| Poland | ISUZU MOTORS POLSKA Sp.z o.o. | Isuzu Motors, Ltd. (ISPOL-IMG Holdings B.V., Isuzu Motors Europe Ltd.) | 1997 | Manufacture and sales of diesel engines for passenger cars and ships |
| | Matsushita Battery Poland S.A. | Matsushita Electric Europe (HQ) Ltd. | 1993 | Manufacture of manganese dry batteries |
| | MOI Tech Europe Sp.z o.o. | Mitsuboshi Belting Co. Ltd. | 2002 | Manufacture of power transmission belts for motor vehicles |
| | NGK Ceramics Polska Sp.z o.o. | NGK Insulators, Ltd. | 2003 | Manufacture of DPFs |
| | NSK ISKRA S.A. | NSK Ltd., Sojitz Corp. | 1998 | R&D and manufacture of bearings and rollers |
| | NSK STEERING SYSTEMS EUROPE (Polska) Sp.z o.o. | NSK Ltd. | 2004 | Manufacture of steering wheels for motor vehicles |
| | NTK Technical Ceramics Polska Sp.z o.o. | NGK Spark Plug Co., Ltd. | 2003 | Manufacture and sales of ceramic cutting tools |
| | Poland Smelting Technologies Sp.z o.o. | Toyota Tsusho Corp., Daiki Aluminium Industry Co., Ltd. | 2003 | Manufacture and sales of aluminum liquids and regenerated masses |
| | SANDEN Manufacturing Poland Sp.z o.o. | Sanden Corporation | 2004 | Manufacture of parts for air conditioners |
| | SATO Polska Sp.z o.o. | Sato Corporation | 2001 | Manufacture and printing of bar code seals |
| | SEWS CABIND POLAND Sp.z o.o. | Sumitomo Electric Industries, Ltd. | 2001 | Manufacture of wire harnesses (for motor vehicles) and parts thereof |
| | SEWS-POLSKA Sp.z o.o. | Sumitomo Wiring Systems, Ltd. | 1995 | Manufacture of wire harnesses (for motor vehicles) and parts thereof |
| | Takata Petri Parts Polska Sp.z o.o. | Takata Corporation | 2001 | Manufacture of seat belts for motor vehicles |
| | Takata Petri Sp.z o.o. | Takata Corporation | 1997 | Manufacture of steering wheels for motor vehicles |
| | TBMECA Poland Sp.z o.o. | Toyota Boshoku Corp., Denso Corp. | 2003 | Manufacture of cylinder head covers for motor vehicles, intake manifolds, etc. |
| | TOHO Poland Sp.z o.o. | Toho Industrial Company Ltd. | 2002 | Manufacture of bearing parts |
| | TONSIL S.A. | Tohoku Pioneer Corporation | 1998 | Manufacture of speakers |
| | Toyo Seal Poland Sp.z o.o. | Toyo Seal Industries Co., Ltd. | 2002 | Manufacture of bearing rubber seals |
| | Toyota Motor Industries Poland Sp.z o.o.(TMIP) | Toyota Motor Corp., Toyota Industries Corp. | 2003 | Manufacture of diesel engines |
| | Toyota Motor Manufacturing Poland Sp.z o.o.(TMMP) | Toyota Motor Corporation | 1999 | Manufacture of transmissions (change gears) |
| TRI (Poland) Sp.z o.o. | Tokai Rubber Industries, Ltd., Mitsui & Co., Ltd. | 1999 | Manufacture and sales of rubber vibration isolators for motor vehicles and other rubber products | |
| TSUBAKI HOOVER POLSKA Sp.z o.o. | Tsubaki Nakashima Co., Ltd. | 2003 | Manufacture of bearing parts | |
| YAGI Factory Poland Sp.z o.o. | Yagi Industries Co., Ltd. | 2003 | Manufacture of bearing parts | |
| YKK Poland Sp.z o.o. | YKK Corporation | 1996 | Manufacture and sales of various fasteners | |
| Czech | AIRS Manufacturing Czech, s.r.o. | Denso Airs Corporation | 2002 | Manufacture of aluminum tube for car air conditioners |
| | AISAN BITRON CZECH s.r.o. | Aisan Industry Co., Ltd. | 2000 | Manufacture of fuel systems for motor vehicles |
| | AISAN BITRON LOUNY s.r.o. | Aisan Industry Co., Ltd. | 2002 | Manufacture of electronic throttle bodies and diecast parts |
| | AISIN EUROPE MANUFACTURING CZECH s.r.o. | Aisin Seiki Co., Ltd. | 2002 | Manufacture of automotive engine pumps |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|--|--|---|---|---|
| Czech | Alcoa Fujikura Czech s.r.o. | Fujikura Ltd. | 2002 | Manufacture of automotive cables |
| | Alps Electric Czech, s.r.o. | Alps Electric Co., Ltd. | 1995 | Manufacture of PC keyboards and video modulators |
| | Amagasaki Pipe Czech, s.r.o. | Amagasaki Pipe Corporation | 2004 | Manufacture of parts for cooling systems |
| | Aoyama Automotive Fasteners Czech, s.r.o. | Aoyama Seisakusho Co., Ltd. | 2002 | Manufacture of automotive parts |
| | ASMO Czech s.r.o. | ASMO Co., Ltd. | 2004 | Manufacture of motors for air conditioners |
| | AVX Czech Republic S.R.O. | Kyocera Corp. (AVX Ltd.) | 1992 | Manufacture of tantalum chip capacitors |
| | Czech Republic ONAMBA s.r.o. | Onamba Co., Ltd. | 2001 | Manufacture of wire harnesses for AV apparatuses |
| | Daiho(Czech) s.r.o. | Daiho Industrial Co., Ltd., Mitsui & Co. Deutschland GmbH, Mitsui & Co., Ltd. (Tokyo) | 2000 | Manufacture and sales of plastic products (TV cabinets) |
| | Daikin Device Czech Republic, s.r.o. | Daikin Industries, Ltd. | 2004 | Manufacture of compressors for air conditioners |
| | Daikin Industries Czech Republic, s.r.o. | Daikin Industries, Ltd. | 2003 | Manufacture of air conditioners |
| | DENSO MANUFACTURING CZECH, s.r.o. | Denso Corporation | 2001 | Manufacture of car air conditioners |
| | Electric Powersteering Components Europe, s.r.o. | Mitsubishi Electric Corp., Koyo Seiko Co., Ltd." | 2001 | Manufacture of electronic control units (ECUs) of electric power steering (EPSs) for motor vehicles |
| | EPCOS, s.r.o. | Matsushita Electric Industrial Co., Ltd. | 1999 | Manufacture of semiconductors |
| | Epispol, a.s. | Dainippon Ink and Chemicals, Inc. | 2002 | Manufacture of epoxy resins |
| | Fuji Koyo Czech s.r.o. | Fuji Kiko Co., Ltd. | 2002 | Manufacture of automotive power steering parts |
| | Fujikoki Czech s.r.o. | Fuji Koki Corporation | 2001 | Manufacture of automotive parts |
| | Furukawa Electric Autoparts Central Europe, s.r.o. | Furukawa Electric Co., Ltd. | 2001 | Manufacture of connectors for automotive air bags |
| | Futaba Czech S.R.O | Futaba Industrial Co., Ltd. | 2002 | Manufacture of automotive emission systems |
| | Glaverbel Czech,a.s. | Asahi Glass Co., Ltd. (Glaverbel S.A.) | 1991 | Manufacture and sales of sheet glass and processed glass |
| | INDET SAFETY SYSTEMS a.s. | Nippon Kayaku Co., Ltd. | 1999 | Manufacture and sales of squibs |
| | Ishimitsu Manufacturing Czech s.r.o. | Ishimitsu Kogyo | 2003 | Manufacture of automotive parts |
| | Japanese Solderless Terminals s.r.o. | J.S.T. Mfg. Co. Ltd. | 2003 | Manufacture of wires and cables |
| | JCEE, s.r.o. | JCC Engineering Co., Ltd., Far East Engineering, Co., Ltd. | 1992 | Manufacture and sales of capacitors |
| | Koito Czech s.r.o. | Koito Manufacturing Co., Ltd. | 2001 | Manufacture of lamps for motor vehicles |
| | Koyo Steering System Czech s.r.o. | Koyo Seiko Co., Ltd. | 2002 | Manufacture of electric power steering |
| | KYB Manufacturing Czech s.r.o. | Kayaba Industry Co., Ltd., Mitsubishi Corp. | 2003 | Manufacture of dampers for motor vehicles |
| | KYOCERA Solar Europe s.r.o. | Kyocera Corporation | 2004 | Manufacture of solar panels |
| LIPLATEC, s.r.o. | Shimizu Industry Co., Ltd. | 2002 | Manufacture of molded plastic products for motor vehicles | |
| Matsushita Electric Works (CZ), s.r.o. | Matsushita Electric Works Co., Ltd. (Europe Matsushita Electric Works Co., Ltd.) | 1997 | Manufacture of control parts, such as relays and switches | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|---|--|---|--|---|
| Czech | Mi-King, s.r.o. | Mitsui & Co., Ltd. | 2004 | Processing and manufacture of steel coils |
| | Mitsubishi Electric Automotive Czech, s.r.o. | Mitsubishi Electric Corporation | 2000 | Manufacture and sales of electric devices for motor vehicles |
| | Nachi Czech, s.r.o. | Nachi-Fujikoshi Corporation | 2003 | Manufacture of bearings |
| | Nichias Czech, s.r.o. | NICHIAS Corporation | 2004 | Manufacture of gaskets for motor vehicles |
| | Nikom,a.s. | Sojitz Corp., Japan Metals & Chemicals Co., Ltd. | 1993 | Manufacture and sales of ferro-vanadium |
| | NPK Europe Manufacturing s.r.o. | Nippon Pneumatic Mfg. Co., Ltd. | 2001 | Manufacture of construction machines |
| | OILES CZECH MANUFACTURING, S.R.O. | Oiles Corporation | 2003 | Manufacture of bearings |
| | OPTREX Chech, a.s. | Optrex Corporation | 1996 | Manufacture of liquid crystal displays (LCDs) |
| | Panasonic AVC Networks Czech, s.r.o. | Matsushita Electric Industrial Co., Ltd. | 1996 | R&D and manufacture of color TVs and image apparatuses |
| | Panasonic Mobile & Automotive Systems Czech s.r.o. | Matsushita Communication Industrial Co., Ltd., Matsushita Electric Industrial Co., Ltd. | 2001 | Manufacture of cellular phones and car audio products |
| | SANKYO Oilless Industry spol. s r.o | Sankyo Oilless Industry, Inc. | 1992 | Manufacture of parts for press dies |
| | Shimano Czech Republic, s.r.o. | Shimano Inc. | 2000 | Manufacture of bicycle gears |
| | Showa Aluminium Czech, s.r.o. | Showa Aluminium Corporation | 1997 | Manufacture of capacitors for car air conditioners |
| | Stavmek, s.r.o. | Komatsu Manufacturing Co., Ltd. | 2004 | Manufacture of construction machines |
| | Steel Center Europe, s.r.o. | Sumitomo Corporation | 2004 | Press work of iron and steel |
| | STV Glass, a.s. | Nippon Electric Glass Co., Ltd. | 2002 | Manufacture of glass parts for color TV tubes and monitors |
| | Sumikei Czech, s.r.o. | Sumitomo Light Metal Industries, Ltd. | 2002 | Manufacture of aluminum parts for car air conditioners |
| | Takada Industries Czech Republic, s.r.o. | Takada Kogyo Co., Ltd. | 2002 | Manufacture of precision plastic parts for motor vehicles |
| | Takata-Petri-Parts, s.r.o. | Takata Corporation | 1992 | Manufacture of automotive cables |
| | TG Safety Systems Czech, s.r.o. | Toyoda Gosei Co., Ltd., Toyota Tsusho Corp. | 2001 | Manufacture of steering wheels and air bags for motor vehicles |
| | Toray Textile Central Europe, s.r.o. | Toray Industries, Inc. | 1997 | Manufacture and sales of woven fabrics of long polyester fibers |
| | Toyo Radiator Czech, s.r.o. | T. RAD Co. Ltd. | 2004 | Manufacture of parts for car air conditioners |
| | Toyoda-Koki Automotive Czech Republic, s.r.o. | Toyoda Machine, Ltd. | 2003 | Manufacture of parts for passenger cars |
| | Toyota Peugeot Citroen Automobile Czech, s.r.o. | Toyota Motor Corporation | 2002 | Manufacture of motor vehicles |
| | TRCZ, s.r.o. | Tokai Rika Co., Ltd. | 2001 | Manufacture of automotive switches |
| | TRIS Czech, s.r.o. | TRIS Inc. | 2001 | Manufacture of carbon brushes for automotive engines |
| Visteon-Nichirin-Czech, s.r.o. | Nichirin Co., Ltd. | 2001 | Manufacture of rubber hoses for automotive cooling systems | |
| Yazaki Wiring Technologies Czech s.r.o. | Yazaki Corporation | 1993 | Manufacture of automotive cables | |
| Zexel Valeo Compressor Czech, s.r.o. | Zexel Valeo Climate Control Corp. (ZVCC) | 2002 | Manufacture of compressors for car air conditioners | |
| Slovakia | Matsushita Audio Video (Slovakia) s.r.o. | Matsushita Electric Industrial Co., Ltd. (Germany) | 2000 | Manufacture of household VTRs |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|--|--|---|----------------------------------|---|
| Slovakia | NMB Minebea Slovakia, s.r.o | Minebea Co., Ltd. | 2004 | Manufacture of keyboards |
| | Panasonic AVC Networks Slovakia s.r.o. | Matsushita Electronic Components Co., Ltd. (Matsushita Electronic Components (Europe) GmbH) | 1997 | Manufacture of power sources, transformer coils, tuners for AV apparatuses and remote controllers |
| | Sluzba SIIX Electronics s.r.o. | SIIX Corp. (SIIX Europe (Germany)) | 2001 | Manufacture of substrate mounting (EMS) |
| | Sony Slovakia, spol.s.r.o | Sony Corp. (Sony Europe B.V.) | 1996 | Manufacture and sales of main TV parts (electron guns, deflection yokes) and assembling of TVs |
| | Sumitomo Electric Wiring Systems-Slovakia s.r.o. | Sumitomo Electric Industries, Ltd. (Sumitomo Electric Wiring Systems (Europe) Ltd.) | 1996 | Manufacture of wire harnesses and allied parts |
| | Todenco Slovakia | Tokyo Electric Wire Industrial Co., Ltd. | 2001 | Manufacture of wire harnesses |
| | TRIM LEADER, a.s. | Toyota Boshoku Corporation | 2000 | Manufacture of seat covers (for motor vehicles) |
| | Yazaki Debnar Slovakia spol.s.r.o. | Yazaki Corporation | 1994 | Manufacture of wire harnesses |
| Hungary | AGC Automotive Hungary | Asahi Glass Co., Ltd. | 2004 | Manufacture of glass for motor vehicles |
| | Aikawa Hungaria Elektronikai KFT. | Aikawa Press Industry Co., Ltd. | 1998 | Manufacture of mechanical parts for electronic apparatuses and car audio parts |
| | Alpine Electronics Manufacturing of Europe Ltd. | Alpine Electronics, Inc. | 1998 | Manufacture of car audio apparatuses |
| | ARRK-TECH KFT. | Arrk Corporation | 2001 | Manufacture of metal molds and molded articles for plastic products |
| | Clarion Hungary Electronics Kft. | Clarion Co., Ltd. | 1997 | Manufacture of car-mounted audio apparatuses |
| | Delphi Calsonic Magyarorszag Gyarto Kft. | Calsonic Corporation | 2000 | Manufacture of car air conditioner parts |
| | DENSO Manufacturing Hungary Ltd. | Denso Corporation | 1997 | Manufacture of diesel injection pumps |
| | DIAMOND ELECTRIC MAGYARORSZAG Kft. | Diamond Electric Mfg. Co., Ltd. | 2000 | Manufacture of automotive parts |
| | Digital Disc Drives Kft. | Tanashin Denki Co., Ltd., Tanashin (Europe) GmbH | 1997 | Manufacture of CD player parts and CD-ROM parts |
| | EPCOS Kft. | EPCOS KK. | 1994 | Manufacture of electronic parts |
| | Euro Exedy Cluch Ltd. | Exedy Corp., ITOCHU Corp., Daikin Clutch Europe Ltd. | 1993 | Manufacture and sales of manual clutches for motor vehicles |
| | Euro Wire & Cable Services Ltd.(EWCS) | Hitachi Cable, Ltd. Group, Hayakawa Densen Kogyo Co., Ltd. Group | 1997 | Manufacture and sales of wire harnesses |
| | Furukawa Electric Institute of Technology Ltd. | Furukawa Electric Co., Ltd. | 1995 | Manufacture and sales of silicon glass |
| | HOYA LENS Manufacturing Hungary Rt. | Hoya Corp. (Hoya Lens Europe N.V.) | 1994 | Manufacture of optical lenses |
| | Ibiden Hungary Manufacturing Kft. | IBIDEN Co., Ltd. (IBIDEN European Holding) | 2004 | Manufacture of filters for removing black smoke from diesel vehicles |
| | Kotobuki ASL Kft. | Kotobuki Corporation | 2004 | Manufacture of seats for public facilities |
| | Magyar Suzuki Corporation | Suzuki Motor Corp., ITOCHU Corp. | 1991 | Manufacture and sales of passenger cars |
| Meiji Rubber Europe Industrial Products Co.,Ltd. | Meiji Rubber & Chemical Co., Ltd. | 2003 | Manufacture of printing blankets | |
| Mitsuba Automotive Systems of Europe Kft. | Mitsuba Corp., Mitsuba Europe Ltd. | 2001 | Manufacture of automotive parts | |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|-----------------------------|---|---|---|--|
| Hungary | Musashi Hungary Manufacturing Limited. | Musashi Seimitsu Industry Co., Ltd. | 2000 | Manufacture of automotive parts |
| | Nissho Hungary Precision Kft. | Nissho Corporation | 1999 | Processing, manufacture and assembling of members based on adhesives, films and foams relating to electronics and motor vehicles |
| | Nissin Foods Kft. | Nissin Food Products Co., Ltd. | 2004 | Manufacture and sales of instant noodles |
| | SANSHIN (Hungary) Kft | Sanshin Electric Co., Ltd. | 1999 | Manufacture and sales of car stereos and car stereo tuners, and assembling and processing of various PCBs |
| | Sanyo Hungary Kft. | Sanyo Electric Co., Ltd., Sanyo Energy (Europe) GmbH | 1999 | Manufacture of nickel hydrogen batteries and lithium ion batteries for cellular phones |
| | SEI Interconnect Products (Hungary) Manufacturing Limited Liability Company | Sumitomo Electric Industries, Ltd. | 2000 | Manufacture of cables |
| | SEWS Automotive Wire Hungary, Ltd. | Sumitomo Electric Industries, Ltd., Sumitomo Wiring Systems, Ltd. | 2003 | Manufacture of electric wires for automotive wire harnesses |
| | SEWS Components Europe Hungary Ltd. | SEWS Components Europe B.V., Sumitomo Electric Wiring Systems Europe Ltd. | 2002 | Manufacture and sales of automotive parts |
| | SEWS Hungary Ltd. | Sumitomo Electric Industries, Ltd., Sumitomo Wiring Systems, Ltd. | 1996 | Manufacture and sales of wire harnesses for motor vehicles |
| | Shin-Etsu Polymer Hungary Kft. | Shin-Etsu Polymer Co., Ltd., Shin-Etsu Polymer Europe B.V. | 2003 | Manufacture and sales of products and parts, materials and rubber and plastic parts for electronic apparatuses |
| | Shinwa Precision (Hungary) Co.,Ltd. | Shinwa Co., Ltd. | 1998 | Development, manufacture and sales of optical apparatuses, such as audio cassette decks and CDs, and allied parts, such as plastic and metal parts |
| | SMK Hungary Kft | SMK Corporation | 2000 | Manufacture of electronic parts for cellular phones, etc. |
| | Sony Hungaria KFT | Sony Corp. (Sony Holding B.V.) | 1994 | Manufacture and sales of AV apparatuses |
| | Stanley Electric Hungary krf. | Stanley Electric Co., Ltd. | 2001 | Manufacture of lamps for motor vehicles |
| | Sunarrow Hungary Kft. | Sunarrow Limited | 2002 | Manufacture of keyboards for cellular phones |
| | Taiho Corporation of Europe Kft. | Taiho Kogyo Co., Ltd. | 2000 | Manufacture of automotive parts |
| | TAKANO HUNGARY KFT. | Takano Kogyo | 2002 | Manufacture of car audio parts |
| | Tanashin (Europe) Kft. | Tanashin Denki Co., Ltd. (Tanashin (Europe) GmbH) | 2000 | Manufacture of car audio parts |
| | TDK Electronics Hungary KFT. | TDK Corp. (TDK Electronics Europe GmbH) | 1995 | Manufacture and sales of power transformers (noise filters, ferrite cores, chip capacitors, etc.) |
| | Tokai-Hetszolo Rt. | Suntory Ltd. | 1991 | Manufacture and sales of wine |
| Toyo Seat Europe Kft. | Toyo Seat Co., Ltd. | 2002 | Manufacture of parts for automotive seats | |
| TSUBAKI-HOOVER Hungary Ltd. | Tsubaki Nakashima Co., Ltd. (Hoover Precision Products, Inc.) | 1999 | Manufacture of rollers | |
| U-SHIN EUROPE Kft. | U-SHIN Ltd. | 2000 | Manufacture of automotive parts | |
| Romania | Fuji Magnetics Romania S.R.L. | Fuji Magnetics GmbH | 2001 | Manufacture and processing of parts for film-loading cameras |
| | JTI-Romania | Japan Tobacco Inc. (JT International Holding BV) | 2000 | Manufacture of cigarettes |
| | Koyo Romania S.A. | Koyo Seiko Co., Ltd. | 1998 | R&D and manufacture of bearings |
| | SEWS Romania SEI | Sumitomo Electric Industries. Ltd., Sumitomo Wiring Systems Co., Ltd. | 2000 | Manufacture of wire harnesses and allied parts |

| Country | Name of local enterprise | Name of Japanese enterprise | Established in | Business lines |
|-----------------------|---|--|----------------|--|
| Romania | Sol-Plus Romania | Sol-Plus Co., Ltd. | 2002 | Plastic molding and casting, and software development |
| | TAKATA-PETRI ROMANIA S.R.L. | Takata Corp. (TAKATA-PETRI A.G.) | 2001 | Manufacture of steering wheel parts |
| | YAZAKI COMPONENT TECHNOLOGY | Yazaki Corporation | 2003 | Manufacture of junction boxes and allied parts |
| | YAZAKI ROMANIA S.R.L. | Yazaki Corporation | 2003 | Manufacture of wire harnesses and allied parts |
| | YKK Romania S.R.L. | YKK Corporation | 2002 | Manufacture and sales of fasteners |
| Lithuania | S-Y Wiring Technologies GmbH | Yazaki Corporation | 2001 | Manufacture of wire harnesses for motor vehicles |
| Serbia and Montenegro | DAIDO METAL KOTOR AD. | Daido Metal Co., Ltd. | 2002 | Manufacture of bearings |
| Turkey | AISIN OTOMOTIV PARCALARI SANAYI VE TICARET A.S. | Aisin Seiki Co., Ltd. | 2004 | Manufacture of car body parts, such as door frames, door locks and outside handles |
| | Anadolu Isuzu Otomotiv Sanayi Ve Ticaret A.S. | Isuzu Motors, Ltd., ITOCHU Corp. | 1980 | Manufacture and sales of trucks and buses |
| | Bando Kockaya Belt Manufacturing Inc. | Bando Chemical Industries, Ltd. | 2003 | Manufacture of transmission belts for motor vehicles and general industries |
| | Brisa (Bridgestone Sabanci Lastik Sanayi ve Ticaret A.S.) | Bridgestone Corporation | 1988 | R&D, manufacture and sales of tire tubes and flaps |
| | DENSO OTOMOTIV PARCALARI SANAYI A.S. | Denso Corporation | 2002 | Manufacture of car air conditioners, heaters, etc. |
| | Federal-Mogul TP Liners Europe Limited Sirketi (FTLE) | Teikoku Pistonring Co., Ltd. | 2002 | Manufacture of piston rings |
| | Honda Otomobilcilik A.S. | Honda Motor Co., Ltd. | 1992 | Manufacture and sales of passenger cars |
| | Rozmas Chuo Otomotiv Yay Sanayi A.S. | Chuo Spring Co., Ltd. | 2002 | Manufacture of coil springs and stabilizers |
| | SANGO OTOMOTIV URUNLERI SANAYI VE TICARET A.S. | Sango Turkey Inc. | 2002 | Manufacture of exhaust-related parts |
| | Takanichi Otomotiv Ic Doseme Parcalari Sanayi ve Ticaret A.S. | Takashimaya Nipatsu Kogyo Co., Ltd., Mitsui & Co., Ltd. | 1997 | Manufacture and sales of seats and door trims for motor vehicles |
| | TAT Tohumculuk A.S. | Kagome Co., Ltd., Sumitomo Corp., Kaneko Seeds Co., Ltd. | 1987 | Manufacture and sales of seeds and seedlings |
| | Toyota Motor Manufacturing Turkey Inc. | Toyota Motor Corp., Mitsui & Co., Ltd. | 1990 | Manufacture of motor vehicles |
| | TOYOTETSU Otomotiv Parcalari San. Ve Tic A.S. | Toyoda Iron Works Co. Ltd. | 2001 | Manufacture of pressed parts for motor vehicles |
| | Yazaki Otomotiv Yan Sanayi ve Ticaret A.S. | Yazaki Corporation | 1995 | Manufacture and sales of wire harnesses for motor vehicles |
| | YKK Metal ve Plastik Urunleri Sanayi ve Ticaret A.S. | YKK Corporation | 1991 | Manufacture and sales of fasteners |

List of Japanese Manufacturing Affiliates

Concurrently Having R & D and Design Centers on their Premises

and Independent Companies(by country)

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|---|--|---|---|--|
| UK | | Advanced Healthcare Ltd. | Shofu Inc. | 1991 | R&D, manufacture and sales of dental materials |
| | | Air Bearings Ltd. | Hitachi Via Mechanics, Ltd. | 1993 | R&D and manufacture of spindles for processing machines of printed boards |
| | ○ | Ajinomoto Pharmaceuticals Europe Limited | Ajinomoto Co., Inc. | 1999 | Clinical development of new drugs |
| | ○ | Akzo Nobel Nippon Paint Ltd. | Nippon Paint Co., Ltd. (Nippon Paint (Europe) Ltd.) | 1993 | R&D and sales of coating materials for coils |
| | ○ | Alps Electric Technology Centre (UK) Limited | Alps Electric Co., Ltd. (Alps Electric (UK) Ltd.) | 1994 | R&D and design of electronic parts |
| | | Anritsu Limited | Anritsu Corp. (Anritsu U.S. Holding Inc.) | 1990 | R&D, manufacture and sales of electronic measuring instruments |
| | | Asahi Glass Fluoropolymers U.K. Ltd. | Asahi Glass Co., Ltd. | 1999 | R&D, manufacture and sales of PTFE resins |
| | | Asahi Seiko (Europe) Ltd. | ASAHI SEIKO CO., LTD. | 1994 | R&D and manufacture of currency identification machines, refunding machines and card refunding read/write machines |
| | | Asahi Thermofil (UK) Ltd. | Asahi Kasei Corporation | 2000 | R&D, manufacture and sales of functional resin compound products |
| | | Audience Systems Ltd. | Kotobuki Co., Ltd. | 1993 | Design, manufacture and sales of audience chairs |
| | | AVX Limited | KYOCERA Corporation (AVX Corp.) | 1990 | R&D, manufacture and sales of passive electronic parts |
| | | Calsonic Kansei Europe Technology Center | Calsonic Kansei Corporation | 1989 | R&D and manufacture of heat exchangers for motor vehicles, etc. |
| | ○ | Chugai Pharma Europe Ltd. | Chugai Pharmaceutical Co., Ltd. | 1993 | R&D of medicines |
| | | Daido Industrial Bearings Europe Ltd. | Daido Metal Co., Ltd. | 1998 | R&D, manufacture and sales of bearings and bushes for diesel engines, turbo chargers, etc. |
| | ○ | Daiichi Pharmaceutical UK Ltd. | Daiichi Pharmaceutical Co., Ltd. | 1993 | R&D and sales of medicines |
| | ○ | Dainippon Screen Engineering of Europe Ltd. | DAINIPPON SCREEN MFG. CO., LTD. (Dainippon Screen (U.K.) Ltd.) | 1985 | R&D of image data processing apparatuses |
| | | Daiwa Sports Ltd. | Daiwa Seiko Inc. | 1977 | R&D, manufacture and sales of fishing gears and sporting goods |
| | | Denso Marston Ltd. | Denso Corp. (Denso International (UK) Ltd.) | 1989 | Design, manufacture and sales of radiators, oil coolers and intercoolers |
| | | Digi Europe Ltd. | Teraoka Seiko Co., Ltd. | 1989 | R&D, manufacture and sales of automatic and non-automatic weighing machines |
| | | Dunlop Tyres UK Ltd. | Sumitomo Rubber Industries, Ltd. (Sumitomo Rubber Europe), Sumitomo Electric Industries, Ltd. | 1984 | R&D, manufacture and sales of tire tubes |
| | | DuPont Teijin Films U.K. Ltd. | Teijin Ltd. (Teijin Holding U.K. PLC) | 2000 | R&D, manufacture and sales of polyester films |
| | | Dura Cables Ltd. | Nippon Cable System, Inc. | 1989 | Design, manufacture and sales of control cables for motor vehicles |
| | | Edinburgh Instruments Ltd. | Hamamatsu Photonics K.K. | 1995 | R&D, design, manufacture and sales of optical apparatuses |
| ○ | Eisai London Research Laboratories Ltd. | Eisai Co., Ltd. | 1990 | R&D of medicines for neurodegenerative diseases and regenerative medicine | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|--|---|--|---|---|
| UK | ○ | Eisai Ltd. | Eisai Co., Ltd. | 1995 | Clinical research and sales of medicines |
| | ○ | Epson (UK) Limited Cambridge Research Laboratory | Seiko Epson Corporation (Epson Europe B.V.) | 1998 | R&D of displays, ICs and computer memories |
| | ○ | Epson Scotland Design Centre | Seiko Epson Corporation (Epson Europe Electronics GmbH) | 2001 | Design of firmware |
| | ○ | Europe Clinical Research Organization for Medicine PLC | InCROM Institute, Inc. | 2001 | Bridging studies for the I- to III-phase clinical tests and clinical tests |
| | ○ | Exedy Clutch Europe Ltd. | EXEDY Corporation | 1990 | R&D and sales of clutches |
| | | F2 Chemicals Ltd. | Asahi Glass Co., Ltd., Mitsubishi Corp. | 1992 | R&D, manufacture and sales of fluorine-based medical and agricultural intermediates |
| | | Fuji Seal Europe, Ltd. | Fuji Seal Industries Co., Ltd. | 1986 | Design, manufacture and sales of shrinkable labels, various packaging materials and packaging-related machines |
| | | FUJIFILM Electronic Imaging Ltd. | Fuji Photo Film Co., Ltd. | 1997 | R&D, manufacture and sales of printing-related apparatuses |
| | ○ | Fujisawa Institute of Neuroscience | Fujisawa Pharmaceutical Corporation | 1992 | R&D of neuroscience |
| | ○ | Fujisawa Limited | Fujisawa Pharmaceutical Corporation (Fujisawa GmbH) | 1993 | R&D and sales of medicines |
| | ○ | Fujitsu Laboratories of Europe Ltd. | Fujitsu Ltd. | 2000 | R&D of photonics and next-generation Optical Internetworking |
| | ○ | Fujitsu Microelectronics Europe GmbH European Design Centre | Fujitsu Ltd. | 2002 | R&D of electronic and quantum devices |
| | | Fujitsu Telecommunications Europe Ltd. | Fujitsu Ltd. | 1991 | R&D, manufacture and sales of communication apparatuses |
| | | GR Advanced Materials Ltd. | Tohoku Ricoh Co., Ltd., Ricoh Co., Ltd. (Ricoh UK Holdings Ltd.) | 1994 | R&D, manufacture and sales of consumable supplies for printing machines (paper and inks) |
| | | Harada Industries (Europe) Ltd. | Harada Industries Co., Ltd. | 1989 | R&D, manufacture and sales of car-mounted antenna systems, cables and actuators |
| | | Hashimoto Limited | Hashimoto Forming Industry Co., Ltd. | 1989 | Design, manufacture and sales of automotive parts (resin molded, coated and compound extruded products) |
| | ○ | Hitachi Cambridge Laboratory | Hitachi, Ltd. (Hitachi Europe Ltd.) | 1989 | R&D of solid state devices |
| | | Honda Engineering Europe Ltd. | Honda Engineering Co., Ltd. | 1990 | Design and manufacture of production facilities and metal molds |
| | ○ | Honda R&D Europe (U.K.) Ltd. | Honda Motor Co., Ltd. | 1992 | Investigation and R&D needed for the development of motor vehicles |
| | | Horiba Jobin Yvon IBH Ltd. | Horiba, Ltd. | 2003 | Design and manufacture of fluorescent life measuring devices |
| | Hosiden Besson Ltd. | Hosiden Corp., Hosiden Europe GmbH | 1990 | R&D, design, manufacture and sales of mobile communication-related parts, hand sets, test phones and network-related parts | |
| ○ | IMRA Europe S.A. UK Research Centre | Aisin Seiki Co., Ltd., Aisin Takaoka Co., Ltd, Aisin AW Co., Ltd. | 1986 | R&D of electromagnetic technology and turbo machines | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|----------------------------|--|---|--|---|
| UK | | Ishida Europe Ltd. | Ishida Co., Ltd. | 1985 | R&D, manufacture and sales of industrial apparatuses such as testing devices, measuring/packaging apparatuses |
| | ○ | J.S.T. (U.K.) Ltd. | J.S.T. Mfg Co., Ltd. | 1982 | Design of connectors, etc. |
| | | Kato Precision (U.K.) Limited | ADVANEX Inc. | 1989 | Design, manufacture and sales of precision springs |
| | | Kato-Entex Limited | ADVANEX Inc. (Kato Precision (U.K.) Limited) | 1993 | Design and manufacture of precision springs and allied products |
| | | Kawasaki Precision Machinery (UK) Ltd. | Kawasaki Precision Machinery Ltd. | 1993 | Design, manufacture and sales of hydraulic pumps, motors, valves, etc. |
| | | KeyMed (Medical & Industrial Equipment) Limited | OLYMPUS Corporation (Olympus KeyMed Group Ltd.) | 1970 | R&D, manufacture, sales and marketing of industrial hard mirrors |
| | | Kiyokuni Europe Limited | Kiyokuni Industry Co., Ltd. | 1987 | Design and manufacture of metal molds for OA apparatuses, etc. and manufacture of pressed parts |
| | ○ | Koichi Tanaka Mass Spectrometry Research Laboratory | Shimadzu Corp. | 2003 | Collection of information and research on mass spectrometry-related technology |
| | | Komatsu U.K. Ltd. | Komatsu Manufacturing Co., Ltd., Komatsu Europe Internationa N.V. | 1985 | R&D, design, manufacture and sales of hydraulic excavators |
| | ○ | Kowa Research Europe Ltd. | Kowa Company, Ltd. | 1999 | Clinical development and development studies of medicines |
| | ○ | Kyorin-Scotland Research Laboratories | KYORIN PHARMACEUTICAL CO., LTD | 2000 | R&D of medicines |
| | ○ | Kyowa Hakko U.K. Ltd. | KYOWA HAKKO KOGYO Co., Ltd. | 1993 | R&D of medicines |
| | | Magna Kansei Limited | Calsonic Kansei Corporation (Calsonic Kansei Europe PLC) | 1996 | R&D, design and manufacture of resin products for motor vehicles, such as cockpit modules |
| | | Magnetto-Topy Wheels (UK) Limited | TOPY INDUSTRIES LIMITED. (Topy International (Europe) B.V.) | 1987 | Design, manufacture and sales of automotive wheels |
| | | Matsushita Electric (U.K.) Ltd. | Matsushita Electric Industrial Co., Ltd. (Matsushita Electric Europe (Headquarters) Ltd.) | 1974 | R&D and manufacture of notebook PCs and microwave ovens |
| | | Matsushita Electronic Components (U.K.) Ltd. | Matsushita Electronics Components Co., Ltd., Matsushita Electric Industrial Co., Ltd. | 1988 | Design and manufacture of car-mounted speakers, etc. |
| | ○ | Maxis UK Ltd. | Maxis Inc. | 2001 | R&D and design of metal molds and automotive parts |
| | | Meiki (UK) Ltd. | Meiki & Company, Ltd. | 1989 | Design, manufacture and repairing of metal molds for plastic products |
| | ○ | Mitsubishi Electric Information Technology Center Europe, B.V. Visual Information Laboratory | Mitsubishi Electric Corp. | 1996 | R&D of next-generation communication technology, digital signal processing and image processing technology |
| | ○ | Mitsubishi Pharma Europe Ltd. | Mitsubishi Pharma Corporation | 2001 | R&D of medicines |
| | Mitsui Babcock Energy Ltd. | Mitsui Engineering & Shipbuilding Co., Ltd. | 1995 | R&D, manufacture and sales of boilers, etc. | |
| | Mitsumi UK Ltd. | Mitsumi Electric Co., Ltd. | 1987 | Design, manufacture and sales of tuners for radios, TVs and videos | |
| ○ | Mitutoyo (UK) Ltd. | Mitutoyo Co., Ltd. | 1978 | R&D of precision measuring instruments | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|--------------------------------|--|---|--|---|
| UK | ○ | Mobisphere Ltd. | NEC Corp. | 1999 | R&D and sales of next-generation mobile communication systems |
| | | NEC Computers Scotland Ltd. | NEC Corp. | 1981 | R&D and manufacture of PCs |
| | ○ | NEC Technologies (UK) Ltd. | NEC Corp. | 1987 | R&D of mobile communication products |
| | | NGF Europe Ltd. | Nippon Sheet Glass Co., Ltd. | 1991 | R&D, manufacture and sales of glass cords for rubber reinforcement |
| | ○ | Nissan Design Europe | Nissan Motor Co., Ltd. | 1992 | Design of vehicles |
| | ○ | Nissan Technical Centre Europe, Ltd. (UK) | Nissan Motor Co., Ltd. | 1988 | R&D of vehicles and units |
| | ○ | NSK European Technology Centre | NSK Ltd. (NSK Europe Ltd.) | 1992 | R&D of bearings |
| | ○ | NTT Europe Basic Research Laboratory | NTT Communications Corporation (NTT Europe Ltd.) | 2004 | R&D relating to bionanoscience |
| | | Oki (UK) Ltd. | Oki Electric Industry Co., Ltd. (Oki Europe Ltd.) | 1987 | Design, manufacture and sales of printers, faxes and electronic apparatuses for motor vehicles |
| | ○ | Opsodis Limited | KAJIMA CORPORATION | 2004 | R&D, licensing and consultant service for the stereophonic system (OPSODIS) |
| | | Panasonic Communications Company (U.K.) Ltd. | Matsushita Electric Industrial Co., Ltd | 1986 | Manufacture of PBXs (private branch exchanges) and DECTs (European-type cordless telephones) and R&D of models exclusively for respective countries based on basic models |
| | ○ | Panasonic Mobile Communications Development of Europe Ltd. | Panasonic Mobile Communications, Co., Ltd. | 2001 | R&D of GSM-type cellular phones and next-generation mobile communication |
| | ○ | Panasonic Office Workstations Ltd. | Matsushita Electric Industrial Co., Ltd. | 1989 | R&D of software technology for digital household electric appliances |
| | | Piolax Manufacturing Ltd. | Piolax Inc. | 2003 | Design and manufacture of industrial fasteners and precision springs for motor vehicles |
| | ○ | Pioneer Digital Design Centre, Ltd. | Pioneer Corporation | 2001 | R&D of digital TV technology and technology standardization activities |
| | | Pioneer Technology (UK) Ltd. | Pioneer Corporation (Pioneer GB Ltd.) | 1990 | R&D and manufacture of acoustic and video products |
| | | Ryobi Aluminium Casting (UK), Ltd. | Ryobi, Ltd. | 1990 | Design, manufacture and sales of diecast products |
| | ○ | Samco Cambridge Laboratory U.K. | SAMCO INC. | 2000 | R&D of thin film technology |
| | | Sanken Power Systems (UK) Limited | Sanken Electric Co., Ltd. | 1989 | Design, manufacture and sales of switch-mode power supplies and motor control modules |
| | | Sanko Gosei UK Ltd. | Sanko Gosei Ltd. | 1988 | Design and manufacture of metal moulds for plastic molding, and design and molding of plastic molded articles |
| | Sansetsu UK Limited | Sansetsu Transportation Co., Ltd. | 1978 | Design, manufacture and sales of plastic packaging materials | |
| | Sanyo Gallenkamp PLC | Sanyo Electric Co., Ltd. | 1990 | R&D, manufacture and sales of centrifugal machines, incubators, etc. | |
| | Sanyo Industries (UK) Ltd. | Sanyo Electric Co., Ltd. | 1982 | Design and manufacture of color TVs | |
| | Satake Corporation UK Division | SATAKE CORPORATION | 1998 | R&D, manufacture and sales of rice/flour milling machines | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|--|--|--|--|--|
| UK | | Sekisui (U.K.) Ltd. | Sekisui Chemical CO., Ltd. (Sekisui Europe B.V.) | 1975 | R&D and manufacture of polyolefin foams |
| | ○ | Sharp Laboratories of Europe, Ltd. | Sharp Corp. | 1990 | Design of silicon chips and R&D of optoelectronic technology, liquid crystal technology, etc. |
| | ○ | Sharp Telecommunications of Europe, Ltd. | Sharp Corp. | 2001 | R&D of mobile communication apparatuses |
| | ○ | Shimadzu Research Laboratory (Europe) Ltd. | Shimadzu Corp. | 1997 | R&D of next-generation mass spectrometers, next-generation scanning electronic microscopes, new spectroscopes and new data processing software |
| | | SMC Pneumatics (U.K.) Ltd. | SMC Corporation | 1979 | R&D, manufacture and sales of pneumatic apparatuses |
| | | SMK (U.K.) Ltd. | SMK Corp. | 1988 | Design, manufacture and sales of remote control units, control panels and AC chargers |
| | | Sony Broadcast Ltd. | Sony Corporation | 1978 | R&D and manufacture of broadcasting equipment (video cameras, TVs, etc.) |
| | | Sony United Kingdom Ltd. | Sony Corporation (Sony Europe Holding B.V.) | 1968 | R&D and manufacture of color TVs, display monitors, semiconductors and allied parts |
| | ○ | SRH Systems Ltd. | Horiba, Ltd. | 2001 | R&D of engine testing systems |
| | | SumiAgro (UK) Ltd. | Sumitomo Corp. | 2000 | R&D, manufacture and sales of agricultural chemicals for agricultural and non-agricultural land |
| | ○ | Sumitomo Pharmaceuticals Europe Limited | Sumitomo Pharmaceuticals Co., Ltd. | 1997 | R&D of medicines |
| | | Surface Technology Systems PLC | Sumitomo Precision Products Co., Ltd. | 1995 | R&D, manufacture and sales of plasma process units |
| | | Synthomer Ltd. | DAINIPPON INK AND CHEMICALS, INCORPORATED (Reichhold Group) | 1987 | R&D and manufacture of carpets, building materials, latexes, etc. |
| | ○ | Takeda Europe Research & Development Centre Ltd. | Takeda Pharmaceutical Company Limited (Takeda Europe Holding Ltd.) | 1998 | Clinical development of medicines |
| | ○ | Takeda Wing | Takeda Pharmaceutical Company Limited | 2004 | R&D of diabetes, new medicines, etc. |
| | ○ | Tamura Hinchley Ltd. | TAMURA Corporation | 1991 | R&D of electronic apparatuses |
| | ○ | Telecom Modus Limited | NEC Corp. | 1998 | R&D and design of next-generation mobile communication systems for Europe |
| | | Terasaki (Europe) Ltd. | Terasaki Electric Co., Ltd. | 1972 | R&D, manufacture and sales of electric circuit breakers, etc. |
| | | Tomoe Tritec, Ltd. | TOMOE VALVE Co., Ltd (Tomoe Valve UK Ltd.) | 1997 | Design, manufacture and sales of triple decentering process valves, etc. |
| | | Toshiba Information Systems (UK) Ltd. | Toshiba Corp., Toshiba Europe GmbH | 1986 | Manufacture of color TVs and air conditioners, and R&D relating to digital TVs |
| ○ | Toshiba Research Europe Limited Cambridge Research Laboratory | Toshiba Corp. | 1998 | R&D of quantum IT and sound technology | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|-------------|---|--|----------------|---|
| UK | ○ | Toshiba Research Europe Limited Telecommunications Research Laboratory | Toshiba Corp | 1998 | R&D of next-generation cellular phone and radio communications technology |
| | | Toyoda-Koki Automotive UK Ltd. | Toyoda Machine Works, Ltd. | 1997 | Manufacture, sales and design of power steering pumps |
| | | Usher-Walker Group Ltd. | DAINIPPON INK AND CHEMICALS, INCORPORATED (Sun Chemical Group B.V.) | 1993 | R&D, Manufacture and sales of printing inks |
| | | Vascutek Ltd. | Terumo Corporation (Terumo Europe N.V.) | 2002 | R&D, manufacture and sales of artificial blood vessels |
| | | Yamazaki Mazak U.K. Ltd. | Yamazaki Mazak Corp. | 1980 | Design, manufacture and sales of machine tools |
| | | YKK (U.K.) Ltd. | YKK Corporation (YKK Holding Europe B.V.) | 1966 | R&D, manufacture and sales of fasteners |
| | ○ | Yokogawa Marex Limited | Yokogawa Electric Corp. | 1997 | R&D of system integration |
| | ○ | Yoshitomi Research Institute of Neuroscience in Glasgow | Mitsubishi Pharma Corporation | 1997 | R&D of medicines |
| | | Yuasa Battery (UK) Ltd. | Yuasa Corp. | 1981 | Design, manufacture and sales of gastight lead accumulators |
| | | Zuken Ltd. | Zuken Inc. (Zuken Group Ltd.) | 1994 | Development, manufacture and sales of CAE/CAD/CAM systems |
| France | | Oniris S.A. | Sumitomo Rubber Industries, Ltd. | 1947 | R&D, manufacture and sales of bed clothing |
| | ○ | Kanebo Ltd., Paris Laboratory | Kanebo, Ltd. | 1966 | R&D (cosmetics) |
| | | YKK France S.A.R.L. | YKK Corporation (YKK Holding Europe B.V.) | 1967 | R&D, design, manufacture and sales of slide fasteners, plastic buckles and Hook-and-Loop fasteners |
| | | AJINOMOTO EUROLYSINE S.A. | Ajinomoto Co., Inc. | 1974 | R&D, manufacture and sales of feed additives (lysine, threonine and tryptophane) |
| | | Dacral S.A. | NOF Corp. | 1975 | R&D, Manufacture and sales of special antirusts |
| | | Three Bond Europe S.A. | Three Bond Co., Ltd. | 1976 | R&D, manufacture and sales of adhesives, sealing agent and processed parts (for automotive engines) |
| | | Laboratoires Takeda S.A. | Takeda Pharmaceutical Company Limited | 1978 | R&D of medicines |
| | | Takasago Europe Perfumery Laboratory S.A.R.L. | Takasago International Corporation | 1978 | R&D, design, manufacture and sales of mixed and synthetic perfumes |
| | | Clarion France S.A. | Clarion Co., Ltd. | 1983 | R&D, manufacture and sales of car stereos |
| | | Dunlop Roues S.A. | Sumitomo Rubber Industries, Ltd. (Dunlop France S.A.) | 1984 | R&D, design, manufacture and sales of car wheels |
| | | Honda Europe Power Equipment S.A. | Honda Motor Co., Ltd. (Honda Motor Europe Ltd.), Honda Motor Europe (South) S.A. | 1985 | R&D, manufacture and sales of lawn mowers and dynamo-electric generators |
| | | KENWOOD Electronics Bretagne S.A. | Kenwood Corp. | 1985 | R&D and manufacture of tuners, car stereos and communication apparatuses |
| | | Peugeot Motorcycles S.A. | Honda Motor Co., Ltd. | 1985 | R&D, design, manufacture and sales of autobicycles |

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|---------|-------------------------------|---|--|---|---|
| France | | Pioneer Electronics France S.A. | Pioneer Corporation (Pioneer Electronics B.V.) | 1985 | Design, manufacture and sales of speaker systems |
| | ○ | Advantest Europe R&D S.A.R.L | Advantest Corp. | 1986 | R&D |
| | | Amada Europe S.A. | Amada Co., Ltd., Amada Machinics, Inc. | 1986 | R&D and manufacture of press brakes, shearing machines and punching machines |
| | ○ | IMRA EUROPE S.A. | Aisin Seiki Co., Ltd., Aisin AW Co., Ltd., Aisin Takaoka Co., Ltd., Aisin Chemical Co., Ltd., IMRA Japan, Inc., IMRA America, Inc., and five other companies | 1986 | R&D in the fields of energy, environment and ITS |
| | | M.B.K. Industrie | Yamaha Motor Co., Ltd., Yamaha Motor Europe N.V. | 1986 | R&D, design, manufacture and sales of motor bicycles, bicycles, outboard motors and parts thereof |
| | | Tetras | Canon Inc. | 1986 | R&D, manufacture and sales of copiers |
| | | Domaine de la Lauzade Kinuito (S.A.R.L.) | Itoham Foods Inc. | 1987 | R&D, brewing and sales of wine |
| | | Ricoh Industrie France S.A. | Ricoh Co., Ltd. | 1987 | Manufacture of copiers, facsimile machines, fixing roller toners, and R&D, manufacture and sales of thermal paper |
| | | Ammann-Yanmar S.A. | Yanmar Diesel Engine Co., Ltd., Seirei Industry Co., Ltd. | 1989 | R&D, manufacture and sales of small civil engineering and construction machines |
| | | Daiichi Sanofi Laboratories Synthelabo | Daiichi Pharmaceutical Co., Ltd. | 1989 | R&D, manufacture and sales of medicines |
| | | KOMORI CHAMBON SA | Komori Corporation | 1989 | R&D, manufacture and sales of printing machines for paper containers |
| | | Louis Royer Et Cie S.A. | Suntory Ltd. (Suntory France) | 1989 | R&D, manufacture and sales of cognac and liqueur |
| | ○ | Rhone D.P.C. Europe | Dainippon Pharmaceutical Co., Ltd. | 1989 | R&D and sales of medicines |
| | | Sharp Manufacturing France S.A. | Sharp Corp. | 1989 | R&D and manufacture of office apparatuses |
| | ○ | Societe Civile d'Etudes et de Recherches Takasago | Takasago International Corporation | 1989 | R&D of fragrances and aroma chemicals |
| | ○ | Canon Research Centre France S.A. | Canon Inc, .Canon Europa N.V., Canon France S.A., Canon Bretagne S.A. | 1990 | R&D (electric machines) |
| | | Comaboko,S.A. | Marubeni Corp. (Marubeni Europe S.A.) | 1990 | R&D, design and manufacture of processed foods (boiled crab pastes, etc.) |
| | | Freudenberg-Uchiyama Europe S.A. | Uchiyama Manufacturing Corp. | 1990 | R&D, design, manufacture and sales of gaskets (transport machine parts) |
| | | Iris Instruments S.A. | Oyo Corp. | 1990 | R&D, design, manufacture and sales of measuring instruments for geotechnical engineering |
| | | Kao Corporation France | Kao Corp. | 1990 | R&D, import and sales of fragrant materials |
| | Mori Seiki France | Mori Seiki Co., Ltd. | 1990 | R&D of machine tools | |
| | Shiseido International France | Shiseido Company, Limited (Shiseido Europe S.A) | 1990 | R&D, manufacture and sales of cosmetics | |
| | Ajinomoto Euro-Aspartame S.A. | Ajinomoto Co., Inc. | 1991 | R&D and manufacture of aspartame (high-sweetness sweetener) | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|--------------------------|--|--|--|--|
| France | | Asahi Thermofil (France) S.A. | Asahi Kasei Corporation, Nichimen Corp. | 1991 | R&D, design, manufacture and sales of plastic products and compounds |
| | | Beaute Prestige International S.A. | Shiseido Company, Limited | 1991 | R&D of perfumes and cosmetics |
| | | Hitachi Computer Products (Europe) S.A. | Hitachi, Ltd. | 1991 | R&D and manufacture of magnetic storages for large computers |
| | | Societe de Mecanique d'IRIGNY (S.M.I.) | Koyo Seiko Co., Ltd. | 1991 | R&D, design, manufacture and sales of automotive parts (steering) |
| | | Francolor Pigments S.A. | Toyo Ink Mfg. Co., Ltd. (Toyo Europe Network S.A.S.) | 1993 | R&D, manufacture and sales of pigments for printing inks |
| | | JSP International Sarl | JSP Corp. | 1993 | R&D, manufacture and sales of resin foams |
| | | Calgraph S.A. | Nireco Corp. | 1994 | R&D, design, manufacture and sales of image processing machines for printing machines |
| | | CALLIOPE S.A. | Tomen Corp., Nichimen Corp. | 1994 | R&D, manufacture and sales of agricultural chemicals |
| | | Fujisawa SARL | Fujisawa Pharmaceutical Corporation | 1994 | R&D, manufacture and sales of medicines |
| | | Hitachi Software Engineering Europe S.A. (HSEE) | Hitachi Software Engineering Co., Ltd | 1994 | R&D and sales of software products |
| | | HPI Hydroperfect International S.A. | Koyo Seiko Co., Ltd. (SMI S.A.) | 1994 | R&D, design, manufacture and sales of motor-operated pumps, gear pumps and gear motors for machines of the automotive industry |
| | | ○ Mitsubishi Electric Information Technology Centre Europe B.V.(Telecommunication Laboratory) | Mitsubishi Electric Corp. | 1995 | R&D (multimedia) |
| | | S2M Societe de Mecanique Magnetique | Seiko Seiki Co., Ltd. | 1995 | Manufacture of vacuum pumps and R&D of special bearing super pumps |
| | | ○ Takii Recherche France S.A. | Takii & Co., Ltd. | 1995 | R&D (seeds and seedlings) |
| | | ABX S.A. | Horiba, Ltd. | 1996 | R&D, manufacture and sales of hemocytometers |
| | | ○ European Sakata SARL | Sakata Seed Corp. | 1996 | R&D (breeding and variety evaluation) |
| | | Exil S.A. | Tsukamoto Co., Ltd. | 1996 | Design (apparel) |
| | | Jideco-4e S.A. | Jidosha Denki Kogyo Co., Ltd. | 1996 | R&D, manufacture and sales of automotive parts (power seat motors, wiper systems and power window motors) |
| | | Toray Plastics Europe S.A.(TPEu) | Toray Industries, Inc. | 1996 | R&D, manufacture and sales of polyester films |
| | | JOBIN-YVON S.A. | Horiba, Ltd. | 1997 | R&D, manufacture and sales of optical and precision apparatuses |
| | | ○ Sony CSL S.A.(Computer Science Laboratory) | Sony Corporation | 1997 | R&D relating to computers |
| | | Arysta Life Science Europe S.A. | Tomen Corp., Nichimen Corp. | 1998 | R&D and manufacture of acaricides for honey parasitic acarids |
| | | Structil S.A. | Mitsubishi Rayon Co., Ltd. | 1998 | R&D, Manufacture and sales of drawn parts and prepregs of carbon fibers |
| | | ○ Toyota Europe Design development S.a.r.l (ED2) | Toyota Motor Corp. | 1998 | R&D of motor vehicles |
| | NTN Transmissions Europe | NTN Corporation | 1999 | R&D and manufacture of constant velocity joints for motor vehicles | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|---------------------------------------|---|---|---|---|
| France | | Adeka Palmarole S.A.S | ASAHI DENKA CO., LTD. | 2000 | R&D, manufacture and sales of resin additives, stabilizers and plasticizers |
| | | KOYO STEERING DIJION SAINT ETIENNE S.A.S. | Koyo Seiko Co., Ltd. | 2000 | R&D, manufacture and sales of automotive parts (steering) |
| | | Thepenier Pharma Industrie S.A. | Nihon Shikizai Inc. | 2000 | R&D, manufacture and sales of medicines and cosmetics |
| | | Hitachi Furukawa Loaders Europe S.A.S. | Hitachi Construction Machinery Co., Ltd., FURUKAWA CO., LTD. | 2002 | R&D and manufacture of wheel loaders |
| | ○ | Centre de Recherche Europeen Akebono (CREA) | Akebono Brake Industry Co., Ltd. | 1995 | R&D of brakes |
| Germany | ○ | NEC Electronics (Europe) GmbH European Technology Center | NEC Corp. | 1973 | Design (semiconductors) and sales (semiconductors and electronic parts) |
| | ○ | Sony-Wega Produktions GmbH | Sony Corporation Sony Europe Holding B.V. | 1975 | R&D (CTVs and audio speakers), training centers |
| | | Makino Werkzeugmaschinenfabrik GmbH | Makino Milling Machine Co., Ltd. | 1978 | R&D, manufacture and sales of machine tools and electric discharge machines |
| | ○ | Ricoh Deutschland GmbH | Ricoh Co., Ltd. | 1978 | R&D (facsimile machines) |
| | ○ | Fujitsu Microelectronics Europe GmbH | Fujitsu Ltd. | 1980 | R&D, design and sales (electronic devices and semiconductors) |
| | ○ | IMRA Europe S.A.S German Research Office | IMRA Europe S.A. (France) | 1981 | R&D (automotive parts, ITS field) |
| | ○ | Takeda Pharma GmbH | Takeda Pharmaceutical Company Limited | 1981 | R&D (medicines) |
| | ○ | Otsuka Frankfurt Research Institute GmbH | Otsuka Pharmaceutical Co., Ltd. | 1982 | R&D (medicines, Pletaal, Mikelan, Meptin and Mucosta) |
| | ○ | Panasonic AVC Networks Germany GmbH | Matsushita Electric Industrial Co., Ltd | 1982 | R&D and sales of home-use VTRs, CDs, minicomponents, MDs and DVDs |
| | ○ | DENSO AUTOMOTIVE Deutschland GmbH | Denso Corp. (Denso International Europe B.V.) | 1984 | R&D of car air conditioners and car heaters |
| | | J.S.T.Deutschland GmbH | J.S.T. Mfg Co., Ltd. | 1984 | R&D, manufacture and sales of connectors and continuous and non-continuous terminals |
| | | Panasonic Automotive Systems Europe GmbH | Matsushita Communication Industrial Co., Ltd., Matsushita Electric Industrial Co., Ltd. | 1985 | R&D, manufacture and sales of car audio apparatuses and CCTV cameras (monitoring cameras) |
| | ○ | DIC Berlin GmbH R&D Laboratory | DAINIPPON INK AND CHEMICALS, INCORPORATED | 1986 | R&D of resin polymers |
| | ○ | Mazda Motor Corporation Europe R&D Representative Office | Mazda Motor Corporation | 1987 | R&D and design of motor vehicles |
| | ○ | Tungaloy Europe GmbH | Tungaloy Corporation | 1987 | R&D and sales of industrial cutting tools |
| | ○ | EDS-Bordnetz-Entwicklungs GmbH | Yazaki Corp. | 1988 | R&D and design of motor vehicle-related apparatuses |
| | ○ | Gould Electronics GmbH | Japan Energy Corp. | 1988 | R&D of electronic materials |
| | ○ | Honda R&D Europe GmbH | Honda Research & Development Co., Ltd. | 1988 | R&D and design (motor vehicles and two-wheeled vehicles) |
| ○ | KPSS (Kao Professional Salon Service) | Kao Corp. | 1989 | R&D of hair care and skin care cosmetics for beauty parlors | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|------------------------|---|---|---|---|
| Germany | | Matsushita Electric Works (Europe) AG | Matsushita Electric Works, Ltd. | 1989 | R&D, manufacture and sales of automatic controller parts |
| | | Optrex Europe GmbH | Optrex Corporation | 1989 | R&D, design, manufacture and sales of liquid crystal displays (LCDs) |
| | | Sumitomo (SHI) Cyclo Drive Germany GmbH | Sumitomo Heavy Industries, Ltd. | 1989 | R&D, manufacture and sales of mechanical power transmission devices and electric apparatuses and manufacture and sales of reduction gears |
| | | BLV Licht-und Vakuumtechnik GmbH | Ushio Inc. | 1990 | R&D, manufacture and sales of electric bulbs |
| | | Faun GmbH | Tadano Ltd. | 1990 | R&D and manufacture of truck cranes and manufacture of vehicles for high lift work |
| | | KANZAN Spezialpapiere GmbH | Oji Paper Co., Ltd., Marubeni Corp. | 1990 | R&D, manufacture and sales of thermosensitive paper |
| | ○ | Otto Benninghoven GmbH | Nikko Co., Ltd. | 1990 | R&D (construction machines) |
| | ○ | Praezision-Motor-Deutsche Minebea GmbH | Minebea Co., Ltd. | 1990 | R&D of small motors, such as HDD spindle motors |
| | | Sankyo Pharma GmbH | Sankyo Co., Ltd. | 1990 | R&D, manufacture and sales of medicines |
| | | Dolmar GmbH | Makita Corp. | 1991 | R&D, manufacture and sales of chain saws and garden tools |
| | ○ | Panasonic R&D Center Germany GmbH | Matsushita Electric Industrial Co., Ltd | 1991 | R&D (digital signal processing) |
| | ○ | Alpine Electronics (Europe) GmbH | Alpine Electronics, Inc. | 1992 | R&D and sales of car navigation, car audio and car-mounted electronic parts |
| | | Citizen Machinery & Boley GmbH | Citizen Watch Co., Ltd. (Citizen Machinery Europe GmbH) | 1992 | R&D and manufacture of precision CNC lathes |
| | | Kao Chemicals GmbH | Kao Corp. (Kao Chemicals Europe S.L.) | 1992 | R&D, manufacture and sales of surfactants |
| | | Omron Electronics Manufacturing GmbH | Omron Europe B.V. | 1992 | Design and manufacture of sensors for FA |
| | ○ | Mitsubishi Motor R&D Europe(MRDE) | Mitsubishi Motors Corporation (Mitsubishi Motors Europe B.V.) | 1993 | R&D and design (automotive parts) |
| | | Tenax Fibers GmbH & Co. KG | Toho Tenax Co., Ltd., | 1993 | R&D, manufacture and sales of industrial highly functional fibers |
| | ○ | Ebara Germany GmbH | Ebara Corp. | 1995 | R&D (soil treatment) |
| | ○ | NEC Europe Ltd. C&C Research Laboratories | NEC Corp. | 1995 | R&D of multimedia communication |
| | | Takata (Sachsen) GmbH | Takata Corporation | 1995 | R&D, manufacture and sales of air bags and seat belts for passenger cars |
| | | Sun Chemical Druckfarben GmbH | DAINIPPON INK AND CHEMICALS, INCORPORATED | 1996 | R&D, manufacture and sales of printing inks |
| | ○ | SANDEN Technical Centre (Europe) GmbH | SANDEN Corporation | 2000 | R&D of car air conditioner parts, car air conditioners and compressors |
| | | MT Picture Display GmbH | Matsushita Electric Industrial Co., Ltd, Toshiba Corp. | 2003 | R&D and manufacture of displays |
| | TOGO SCHERDEL GmbH | TOGO SEISAKUSYO CORPORATION | 2003 | R&D and manufacture of compression springs, blade springs and tension springs | |
| ○ | Toyoda Gosei Europe NV | TOYODA GOSEI CO., LTD. | 2003 | R&D of air bags and safety systems | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|-------------|--------------------|---|--|--|--|
| Germany | | Celon AG medical instruments | Olympus Optical Co., Ltd. | 2004 | R&D, Manufacture and sales of medical apparatuses (endoscopes) |
| Netherlands | | Sekisui Alveo B.V. | Sekisui Chemical Co., Ltd. | 1973 | R&D and manufacture of polyolefin foams |
| | | Eslon B.V. | Sekisui Chemical Co., Ltd. | 1974 | R&D, manufacture and sales of plastic building materials |
| | | Fuji Photo Film B.V. | Fuji Photo Film Co., Ltd. | 1982 | R&D, manufacture and sales of photosensitive materials for photography |
| | ○ | Koike Europe B.V. | Koike Sanso Co., Ltd. | 1982 | R&D (automatic fusing machines) |
| | | Yokogawa Europe B.V. | Yokogawa Electric Corp. | 1982 | R&D, manufacture and sales of recorders, controllers, analyzers and electronic measuring instruments |
| | | Mitutoyo Nederland B.V. | Mitutoyo Co., Ltd. | 1988 | R&D, manufacture and sales of precision measuring instruments |
| | | Omron Manufacturing of The Netherlands B.V. | Omron Corp. (Omron Electronics Europe B.V.) | 1989 | R&D, manufacture and sales of FA-related apparatuses |
| | | Chugoku Paints B.V. | Chugoku Marine Paints, Ltd. | 1991 | R&D, manufacture and sales of coating materials |
| | | Nitta Corporation of Holland B.V. | Nitta Industries Co., Ltd. | 1991 | R&D, manufacture and sales of resin conveyor belts |
| | ○ | Snow Brand European Research Laboratories B.V. | Snow Brand Milk Products Co., Ltd. | 1991 | R&D (dairy science) |
| | ○ | Takasago International (Nederland) B.V. | Takasago International Corporation (Takasago Europe Perfumery Laboratory S.A.R.L.) | 1991 | R&D (perfumes) |
| | | Yamanouchi Europe B.V. | Yamanouchi Pharmaceutical Co., Ltd. (Yamanouchi B.V.) | 1991 | R&D, manufacture and sales of medicines |
| | | Mitsubishi Caterpillar Forklift Europe B.V. | Mitsubishi Heavy Industries, Ltd., Mitsubishi Corp. | 1992 | Design, manufacture and sales of forklifts |
| | | Fuji Seal Europe B.V. | Fuji Seal Industries Co., Ltd. | 1994 | R&D, manufacture and sales of machines for attaching shrink labels and cap seals |
| | | Nitec (Europe) B.V. | Nissin Food Products Co., Ltd., Mitsubishi Corp. | 1994 | R&D |
| | | Hosokawa Ter Braak B.V. | Hosokawa Micron Corp. | 1996 | Manufacture and sales of confectionery making apparatuses, and R&D of confectionery making systems |
| | | KIKKOMAN FOODS EUROPE B.V. | Kikkoman Corporation | 1996 | R&D and manufacture of soy sauce and allied commodities |
| | | Mitsubishi Elevator Europe B.V. | Mitsubishi Electric Corporation, Mitsubishi Electric Building Techno-Service Co., Ltd. | 1996 | R&D, design, manufacture, sales, installation and maintenance of elevators |
| | ○ | Koyo Seiko Co., Ltd European Technical Center | Koyo Seiko Co., Ltd. | 1997 | R&D (bearings) |
| | | Yokogawa Industrial Safety Systems B.V.(YIS-HQ) | Yokogawa Electric Corp. | 1997 | R&D, design, manufacture and sales of safe instrumentation systems |
| | Teijin Twaron B.V. | Teijin Ltd. | 2001 | Manufacture and sales of Twaron (para-aramid fibers) | |
| Belgium | | Kaneka Belgium N.V. | Kaneka Corp., Mitsui & Co., Ltd. | 1970 | R&D, manufacture and sales of MBS resin, polyethylene foam, polypropylene, and modified silicones |
| | | Matsushita Battery Belgium N.V. | Matsushita Electric Industrial Co., Ltd., Matsushita Battery Industrial Co., Ltd. | 1970 | Design and manufacture of dry batteries and rechargeable batteries |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|---|--|--|--|--|
| Belgium | | Daikin Europe N.V. | Daikin Industries, Ltd. | 1972 | R&D, manufacture and sales of air conditioners for general industrial use |
| | | Nitto Europe N.V. | Nitto Denko Corporation | 1974 | R&D, manufacture and sales of industrial adhesive tapes and electric insulating tapes |
| | | Pioneer Technology Belgium N.V. | Pioneer Corporation | 1976 | R&D and manufacture of car stereos |
| | | Rotary Nozzle International S.A. | NKK Corp., TYK Ltd., Nihon Rotary Nozzle Co., Ltd. | 1976 | R&D, manufacture and sales of refractories, iron manufacturing machines and controllers |
| | | Flat Glass Company of the Asahi Glass Group S.A. | Asahi Glass Co., Ltd. | 1981 | R&D, manufacture and sales of sheet glass and processed glass (mirrors, tempered glass laminate, double glazing) |
| | | Tosoh Bioscience N.V. | Tosoh Corp. | 1984 | R&D, manufacture and sales of diagnostic reagents |
| | | NGK Ceramics Europe S.A. | NGK Insulators Ltd. (NGK EUROPE S.A.) | 1985 | R&D and manufacture of catalyst carriers for treatment of motor vehicle emissions |
| | ○ | Chiyoda Europa N.V./S.A. | Chiyoda Gravure Printing Co., Ltd., Chiyoda Express Co., Ltd. | 1987 | R&D and design for the printing industry |
| | | Amano Electronics Europe, N.V. | Amano Electric Co., Ltd. | 1988 | R&D, design, manufacture and sales of time recorders, parking apparatuses and information apparatuses |
| | | Ajinomoto Omnicem S.A./N.V. | Ajinomoto Co., Inc. | 1989 | R&D, manufacture and sales of medicines, bulk pharmaceuticals, intermediate products, tannic acids, surfactants for agriculture, and agricultural chemical compounds |
| | ○ | Nissan Technical Centre Europe Ltd (Brussels Branch) | Nissan Motor Co., Ltd. (Nissan European Technology Centre. U.K.) | 1989 | R&D (motor vehicles) |
| | | Parker Industries of Europe N.V. | NIHON PARKERIZING CO., Ltd., PARKER INDUSTRIES, INC., PARKER ENGINEERING CO., LTD., Parker-arrestor Co., LTD | 1989 | R&D, manufacture and sales of rust preventive oils |
| | | AW Europe S.A. | Aisin AW Co., Ltd., Aisin Seiki Co., Ltd. | 1990 | R&D, manufacture and sales of automatic transmissions for motor vehicles |
| | | JSR Micro N.V. | JSR Co., Ltd. | 1990 | R&D, manufacture and sales of photo-resists and allied chemicals |
| | | Mutoh Europe N.V. | Mutoh Industries Ltd. | 1990 | R&D and manufacture of lettering machines and plotters |
| | ○ | Toyota Motor Marketing & Engineering Europe NV/SA | Toyota Motor Corp. | 1990 | R&D (motor vehicles and parts thereof) |
| | | AGC Automotive Europe S.A. | Asahi Glass Co., Ltd. (Glaverbel S.A.) | 1991 | R&D, manufacture and sales of glass for motor vehicles |
| | | Fuji Oil Europe | Fuji Oil Co., Ltd., Fuji Oil (Singapore) | 1992 | R&D, manufacture and sales of vegetable oils and fats |
| | | Eval Europe N.V. | Kuraray Co., Ltd., Kuraray Europe GmbH (Germany) | 1997 | R&D, manufacture and sales of EVOH resins (ethylene-vinyl alcohol copolymer resins) |
| | | SYSMEX Belgium S.A. | SYSMEX CORPORATION | 1997 | R&D (medical care-related software and specimen testing apparatuses) |
| ○ | Koito Manufacturing Co., Ltd. Europe Technical Center | Koito Manufacturing Co., Ltd. | 1999 | R&D (lamps for motor vehicles and allied electronic parts) | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|------------|------------------------|---|--|---|--|
| Luxembourg | | Dupont Teijin Films Europe S.A. | Teijin Ltd. | 1991 | R&D, manufacture and sales of polyester films for audio and video apparatuses |
| Ireland | ○ | Hitachi Europe Ltd., Research & Development Centre, Dublin Laboratory | Hitachi, Ltd. | 1989 | R&D (software) |
| | | Olympus Diagnostica GmbH(Irish Branch) | Olympus Optical Co., Ltd. | 1989 | R&D and manufacture of chemicals for diagnostic purposes |
| | ○ | TDK Electronics Ireland Limited | TDK Corporation (TDK Europe S.A.) | 1999 | R&D (electronic parts for cellular phone terminals) |
| Spain | | Dalhimetal España,S.A. | Nihon Plast Co., Ltd. | 1929 | R&D, design, manufacture and sales of automotive parts |
| | | UBE Chemical Europe,S.A. | Ube Industries, Ltd. (Ube Corporation Europe, S.A.) | 1967 | R&D, manufacture and sales of caprolactam, ammonium sulfate, and fine products (1·6HD, DDA, MEKO, etc.) |
| | | Sanyo España,S.A. | Sanyo Electric Co., Ltd. (SANYO FISHER Vertriebs GmbH) | 1969 | Manufacture and sales of color TVs and R&D and sales of other consumer apparatuses |
| | | ACERINOX,S.A. | Nisshin Steel Co., Ltd., Metal One Corporation | 1970 | R&D, design, manufacture and sales of stainless steel |
| | | Kao Corporation,S.A. | Kao Corp. | 1970 | R&D, manufacture and sales of salts for softening agents, raw materials for perfumes and cosmetics, and perfumes |
| | | Sony España,S.A. | Sony Corporation | 1972 | Design, manufacture and sales of color TVs |
| | | Fujitsu Manufacturing España,S.A. | Fujitsu Ltd. | 1973 | R&D, manufacture and sales of information processing apparatuses, communication apparatuses, and automobile-related electronic apparatuses and customization of ATMs |
| | | Matsushita Electric España,S.A. | Matsushita Electric Industrial Co., Ltd | 1973 | Design, manufacture and sales of vacuum cleaners |
| | ○ | Felguera-IHI,S.A. | Ishikawajima - Harima Heavy Industries Co., Ltd. | 1975 | Design (design and fabrication of various tanks and storage plants) |
| | | Hoya Lens Iberia,S.A. | Hoya Corp.(Hoya Lens Europe N.V.) | 1978 | R&D and manufacture of lenses for glasses |
| | | Nissan Motor Ibérica,S.A. | Nissan Motor Co., Ltd., Nissan Europe N.V. | 1980 | R&D, manufacture and sales of passenger and commercial-use cars, four-wheel drive cars and engines |
| | | Yamaha Motor España,S.A. | Yamaha Motor Co., Ltd., Yamaha Motor Europe N.V. | 1981 | Manufacture and sales of two-wheel vehicles and R&D and sales of marine products and ATVs (four-wheel buggy vehicles) |
| | | A.P.Amortiguadores,S.A. | Kayaba Industry Ltd. | 1983 | R&D, design, manufacture and sales of shock absorbers |
| | | INGEMAT,S.A. | Hirotec Corporation | 1986 | R&D, design, manufacture and sales of jigs and devices for assembling motor vehicles |
| | | Sharp Electrónica España,S.A. | Sharp Corp. | 1986 | Manufacture and sales of color TVs and R&D and sales of household electric appliances and information commodities |
| | Sakata Inx España,S.A. | Sakata Inx Corporation | 1987 | R&D, manufacture and sales of printing inks | |
| | Terasaki España,S.A.U. | Terasaki Electric Co., Ltd. | 1987 | R&D, design, manufacture and sales of industrial circuit breakers | |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|-------------------------------|---|--|-------------------------------------|--|
| Spain | | Aceites Esenciales y Derivados S.A.(ACEDESA) | Takasago International Corporation | 1988 | R&D, manufacture and sales of perfumes and flavors for cosmetics, soaps, foods, etc |
| | | Daicolorchem EU,S.A. | Dainichiseika Colour & Chemicals Mfg. Co., Ltd. | 1989 | Manufacture and sales of organic and inorganic pigments, import and sales of chemical products and R&D (only pigments) |
| | ○ | Paceco España S.A. | Mitsui Engineering & Shipbuilding Co., Ltd., MITSUI & CO., LTD., Mitsui and Co. UK PLC | 1989 | Design (container cranes) |
| | | Ebara España Bombas,S.A. | Ebara Corp. | 1990 | R&D, manufacture and sales of industrial pumps |
| | | Showa Europe,S.A. | Showa Corporation | 1990 | R&D, manufacture and sales of shock absorbers for two-wheel vehicles |
| | ○ | Kenogard,S.A. | Sumitomo Chemical Co., Ltd., Nissan Chemical Industries, Ltd. | 1992 | R&D (agricultural chemicals) |
| | | Barberet & Blanc,S.A. | Kirin Brewery Co., Ltd. (Kirin Agribio B.V.) | 1994 | R&D, manufacture and sales of carnation seeds and seedlings |
| | ○ | FUJISAWA,S.A. | Fujisawa Pharmaceutical Corporation | 1994 | Development and sales of Prograf |
| | | Nissan Vehículos Industriales,S.A. | Nissan Motor Co., Ltd. (Nissan Motor Ibérica, S.A.) | 1994 | R&D, manufacture and sales of small and medium trucks and vans |
| | | Nissan Forklift España,S.A. | Nissan Forklift Europe B.V. | 1995 | Design, manufacture and sales of forklifts |
| | ○ | Akzo Nobel Nippon Paint España,S.A. | Nippon Paint Co., Ltd. | 1996 | R&D and consignment manufacture of coil coating materials |
| | ○ | Nissan European Technology Centre España,S.A.(NETC-E) | Nissan Europe N.V., Nissan European Technology Centre Ltd. (UK) | 1997 | R&D (motor vehicles) |
| | | DIC Coatings,S.L. | DAINIPPON INK AND CHEMICALS, INCORPORATED | 1998 | R&D, manufacture and sales of can coating materials and metallic inks |
| | | Katsuyama Europe,S.A. | Katsuyama Kikai, Ltd. | 1999 | R&D, design, manufacture and sales of building maintenance supplies (gondolas) |
| | | Nifco Products España,S.L. | Nifco Inc. | 2000 | R&D, design, manufacture and sales of plastic parts for motor vehicles |
| | | Sumitomo Bakelite Europe (Barcelona),S.L. | Sumitomo Bakelite Company Limited (Sumitomo Bakelite Europe, N.V.) | 2000 | R&D, manufacture and sales of industrial phenol resins |
| | UBE Engineering Plastics,S.A. | Ube Industries, Ltd. (Ube Corporation Europe, S.A.) | 2004 | R&D, manufacture and sales of nylon | |
| Italy | | Alcantara S.p.A. | Toray Industries, Inc., MITSUI & CO., LTD. | 1974 | R&D, design, manufacture and sales of microfiber products |
| | | Belgarda S.p.A. | Yamaha Motor Co., Ltd. (Yamaha Motor Europe) | 1980 | R&D, manufacture and sales of two-wheel vehicles |
| | | Takeda Italia Farmaceutici S.p.A. | Takeda Pharmaceutical Company Limited | 1982 | R&D, manufacture and sales of medicines |
| | | Fiat-Hitachi Excavators S.p.A. | Fiat-Hitachi Excavators S.p.A. | 1986 | Design, manufacture and sales of construction machines |
| | | Alladium S.p.A. (Olivetti -Canon) | Olivetti Tecnost | 1987 | R&D and manufacture of copiers |
| | | Olivetti Canon Industriale | Canon Inc. | 1987 | R&D and manufacture of copiers |

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|---------|------------------------------------|--|--|---|---|
| Italy | ○ | Bridgestone / Firestone Technical Center Europe S.p.A. | Bridgestone Corp. | 1988 | R&D and design of tires for passenger cars, trucks, buses and agricultural vehicles |
| | | Ebara-Pumps Europe S.p.A. | Ebara Corp. | 1988 | R&D, manufacture and sales of general purpose pumps and industrial pumps |
| | | Miteni S.p.A. | Mitsubishi Corp., Mitsubishi Materials Corporation (Tochem Products Co., Ltd.) | 1988 | R&D, manufacture and sales of medicines and intermediate products of agricultural chemicals |
| | | Landini S.p.A. | Iseki & Co., Ltd. | 1989 | R&D, manufacture and sales of medium tractors |
| | | Ajinomoto Italia/ Bioitalia S.p.A. | Ajinomoto Co., Inc. | 1990 | R&D and manufacture of lysine for feed |
| | | Shimano Italia S.p.A. | Shimano Inc. (Shimano Singapore Pte Ltd.) | 1990 | R&D, manufacture and sales of bicycle parts |
| | | VENDO (ITALY) S.p.A | SANDEN Corporation (Vendo Europe Inc.) | 1990 | R&D, design, manufacture and sales of automatic vending machines |
| | | Sanyo Argo Clima S.r.l. | Sanyo Electric Co., Ltd., Sumitomo Corp., Sumitomo Corporation Italia S.p.A. | 1991 | R&D and manufacture of air conditioners |
| | ○ | YKK AP Design Studio Milano | YKK Architectural Products Inc. | 1991 | Design (building materials: doors, interiors, exteriors (gates, balconies, etc.)) |
| | ○ | CREA S.r.l. | Amada Co., Ltd., Amada Engineering Service Company Ltd. | 1993 | R&D and design (machines and robots) |
| | | TMI Europe S.p.A. | Teijin Ltd., ITOCHU Corporation, ITOCHU Italiana S.p.A. | 1994 | R&D, manufacture and sales of woven fabrics of long polyester fibers |
| | | Italpet Reforme S.p.A. | Marubeni Corp. | 1995 | R&D and manufacture of resins for PET bottles |
| | | TOK Italia S.p.A. | TOKYO OHKA KOGYO CO., LTD. | 1995 | R&D and manufacture of photo-resists for printed boards |
| | | Yanmar Cagiva S.p.A. | Yanmar Diesel Corp. | 1996 | R&D, manufacture and sales of diesel engines |
| | | Toyo Tanso Europe S.p.A. | Toyo Tanso Co., Ltd. | 1997 | R&D, manufacture and sales of carbon products |
| | DENSO MANUFACTURING ITALIA, S.p.A. | Denso Corp. | 1999 | R&D, manufacture and sales of alternators, starters and small motors for motor vehicles | |
| Finland | | Jujo Thermal OY | Nippon Paper Industries Co., Ltd., Mitsui & Co., Ltd. | 1992 | R&D, manufacture and sales of thermosensitive paper |
| | | NaNa Europe OY | Nanatanigawa Lumber Industries Co., Ltd. | 1996 | R&D and manufacture of building materials for houses |
| Sweden | | SiTek Electro Optics AB | Autex Inc. | 1976 | R&D, design, manufacture and sales of position measuring electronic parts |
| | | Hagby-Asahi AB | Asahi Diamond Industrial Co., Ltd. | 1979 | Design, manufacture and sales of diamond tools |
| | | Hoya Lens Sweden AB | Hoya Corp., Hoya Europe B.V. | 1980 | R&D, manufacture and sales of lenses for glasses |
| | | Motoman Robotics Europe AB | Yaskawa Electric Corp. | 1984 | Design, manufacture and sales of robot systems |
| | | Ohlins Racing AB | Yamaha Motor Co., Ltd. (Yamaha Motor Europe N.V.) | 1987 | R&D, design, manufacture and sales of shock absorbers |
| | | Fuji Autotech AB | Fuji Kiko Co., Ltd. | 1993 | R&D, design, manufacture and sales of parts for trucks and passenger cars |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|----------|-------------|---|---|----------------|--|
| Sweden | | SEIBU GIKEN DST AB | Seibu Giken Co., Ltd. | 1993 | Design, manufacture and sales of dehumidifiers, total enthalpy heat exchangers and VOC concentrators |
| | | BT Industries AB | Toyota Industries Corp. | 2000 | R&D, manufacture and sales of indoor transport machines |
| | | Sony Ericsson Mobile Communications AB | Sony Corporation | 2001 | R&D and manufacture of cellular phones |
| Denmark | ○ | Burmeister & Wain Scandinavian Contractor A/S | Mitsui Engineering & Shipbuilding Co., Ltd. (MESCO Denmark A/S) | 1990 | R&D, sales, construction and maintenance of diesel power plants |
| | | Envotech OHM Engineering Aps | OHM Electric Co., Ltd. | 1997 | R&D and manufacture of wastewater treatment systems |
| | ○ | Sanyo Component europe GmbH Mobile & Clean Energy Division | Sanyo Electric Co., Ltd. | 1999 | Development and design of batteries |
| | | OFS-FITEL I/S | Indirect investment through the local corporation of Furukawa Electric Co., Ltd., USA | 2001 | R&D and manufacture of optical fibers |
| | ○ | Bioener ApS | Takuma Co., Ltd., ITOCHU Corp. | 2002 | R&D and sales of biomass power plants |
| | | Sakata Ornamentals Europe A/S | Sakata Seed Corp. | 2003 | R&D, manufacture and sales of flower seeds |
| Austria | | Reichhold Chemie GmbH | DAINIPPON INK AND CHEMICALS, INCORPORATED | 1943 | R&D, design, manufacture and sales of synthetic resins, etc. |
| | | Fischer GmbH | Kanematsu Co., Ltd., Kanematsu Deutschland, Goldwin Inc. | 1992 | R&D, design, manufacture and sales of sporting goods |
| | | HORIBA GmbH | Horiba, Ltd. (HORIBA Europe GmbH) | 1992 | Design, manufacture and sales of air pollution measuring instruments |
| Portugal | | Salvador Caetano, I.M.V.T., S.A. | Toyota Motor Corp. | 1971 | Design and assembling of bus bodies, automobile parts and commercial cars (Toyota cars) |
| | | Nemoto Portugal-Química Fina, Lda.. | NEMOTO & CO., LTD., Sojitz Corporation | 1990 | R&D, manufacture and sales of inorganic and fluorescent pigments |
| | | NEC Portugal-Telecomunicações e Sistemas, S.A. | NEC Corp., NEC Do Brasil | 1995 | R&D, manufacture, sales and maintenance of communication-related apparatuses (telephone exchanges, telephone sets, carrier apparatuses, and radio communication apparatuses) |
| Greece | | Tosoh Hellas A.I.C. | Tosoh Corp., Mitsubishi Corp. | 1973 | R&D and manufacture of electrolytic manganese dioxide |
| Poland | ○ | FQS Poland Sp.z o.o. | Fujitsu Kyushu System Engineering Limited | 1998 | R&D (computer software) |
| | | NSK ISKRA S.A. | NSK Ltd. (NSK Europe Ltd.), Nichimen Corp. | 1998 | R&D and manufacture of bearings and rollers |
| Czech | | Panasonic AVC Networks Czech,s.r.o. | Matsushita Electric Industrial Co., Ltd | 1996 | R&D and manufacture of color TVs and video apparatuses |
| | ○ | Panasonic Europe Software Development Laboratory s.r.o. | Matsushita Electric Industrial Co., Ltd | 2001 | Software development |
| | | Olympus Service Facility Czech, s.r.o. | Olympus Optical Co., Ltd. | 2003 | High-tech service center for cameras and allied apparatuses |
| Hungary | ○ | Furukawa Electric Institute of Technology Co.,Ltd. | Furukawa Electric Co., Ltd. | 1990 | R&D of electric insulating materials |

| Country | Independent | Name of Local Enterprise | Name of Japanese Enterprise | Established in | Main Products / Business |
|---------|-------------|--|--|----------------|--|
| Hungary | | Shinwa Precision (Hungary) Co.,Ltd. | Shinwa Co., Ltd. | 1998 | Development, manufacture and sales of optical apparatuses such as audio cassette decks and CDs, and allied parts, such as plastic and metallic parts |
| | ○ | TATEYAMA Magyar Laboratorium Kft. | Tateyama Kagaku Industry Co., Ltd., Tateyama System Laboratory Co., Ltd. | 1999 | Software development |
| Romania | | Koyo Romania S.A. | Koyo Seiko Co., Ltd. | 1998 | R&D and manufacture of bearings |
| | ○ | Ferrotec Engineering Romania | Ferrotec Corporation | 2002 | R&D of mechatronics and new materials |
| | | Sol-Plus Romania | Sol-Plus Co. Ltd. | 2002 | Plastic molding and casting, and software development |
| Turkey | | Brisa (Bridgestone Sabanci Lastik Sanayi ve Ticaret A.S.) | Bridgestone Corp. | 1988 | R&D, manufacture and sales of tire tubes and flaps |

