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Prepared By: Masayuki "Alex" Otsuka

Approved By: Barrett Bumpas

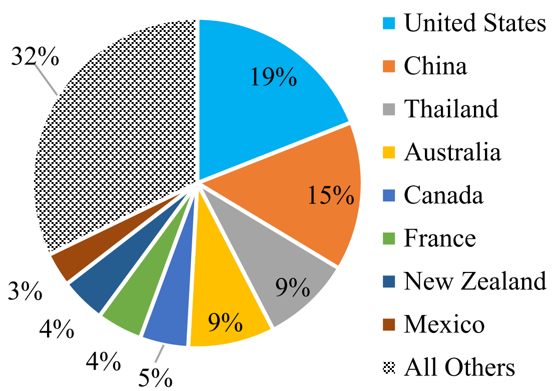
Report Highlights:

Following eight consecutive years of growth, Japan's hotel, restaurant and institutional (HRI) foodservice industry achieved record sales of JP¥33,318 billion (US$305.7 billion) in 2019. However, since February 2020, food service sales at restaurants and hotels have dropped significantly as schools and offices have closed, tourism has halted, and public outings have been reduced because of the COVID-19 pandemic. During the national state of emergency, HRI sales hit unprecedented lows, down 40 percent year-over-year in April; though, sales have since recovered somewhat, down 15 percent year-over-year in July. HRI industry stakeholders are pursuing new business models and expanding takeout and delivery services.

Market Fact Sheet: Japan

Executive Summary:
The United States is the largest foreign supplier of food and agricultural products to an import-reliant Japan (24 percent of import market share)—the fourth largest market for U.S. agricultural products in 2019 ($11.7 billion). On January 1, 2020, the U.S.-Japan Trade Agreement (USJTA) entered into force, providing preferential tariff access for many U.S. agricultural products. Japan's food industries are well-developed and innovative in all sectors, including, retail, food service, food processing, and distribution.

Consumer-Oriented Imports
($33.8 Billion, 2019)



Food Processing Industry:
The $220 billion food processing industry produces a wide variety of foods: traditional Japanese, Western, and health-oriented foods for infants and the elderly. Food processors focus on maintaining market share among traditional product lines while developing creative and innovative food products to attract consumers.

Food Retail Industry:
In 2019, the total value of all retail food and beverage sales was $483 billion. Supermarkets represent the bulk of the retail food sales at 70 percent and the convenience store sector accounts for another 14 percent of sales. Ready-to-eat meals or take-home food items represent an area of growth.

Population: 125,507,472 (July 2020 est.)
GDP: $4.97 trillion (3rd)
GDP/Capita: $39,290

Top Ten Growth Food Products
1) Beef and Beef Products
2) Pork and Pork Products
3) Processed Vegetables
4) Wheat and Wheat Products
5) Fresh and Processed Fruit
6) Tree Nuts and Peanuts
7) Distilled Spirits
8) Wine and Beer
9) Cheeses
10) Condiments and Sauces

Food Industry by Channels

Consumer-Oriented Imports	$34 billion
Food Processing Industry	$220 billion
Food Industry Gross Sales	$788 billion
- *Retail*	*$483 billion*
- *Food Service*	*$305 billion*

Top Ten Food Service Providers

McDonald Japan	Sushiro
Zensho Holdings	Plenus
Skylark Holdings	Dotour
Colowide	Create Restaurants
KFC Japan	Nisshin Healthcare

Strength	Weakness
U.S. products are in demand and remain trendy.	The negotiating and decision-making process can take time.
Opportunity	**Challenge**
With USJTA, nearly 90 percent of U.S. products are duty free or receive preferential tariff access.	For products not covered in USJTA, many other suppliers enjoy tariff concessions through other FTAs.

Data sources include: Global Agricultural Trade System, Global Trade Atlas, Japan Ministry of Finance, Japan Ministry of Economy, Trade and Industry, Japan Food Service Association, The World Factbook, The World Bank. For additional information, contact ATOTokyo@fas.usda.gov

COVID-19 Impact on Food Service Sales

Beginning in February 2020, the COVID-19 pandemic caused restaurant and hotel food service sales to fall dramatically as schools closed, tourism halted, and public outings were greatly reduced. Following the lift of the nationwide state of emergency on May 25, food service sector monthly sales recovered slightly in July (down 15 percent from 2019) after hitting unprecedented lows in April (down 40 percent). Conversely, the pandemic led to a significant increase in retail sales at supermarkets, with year-over-year monthly totals up 20 to 30 percent for most major chains in March and April, though sales have since returned to more normal levels. The Tokyo Agricultural Trade Office (ATO) is following developments and publishing a series of reports titled "COVID-19 Impacts on Food Distribution in Japan" which can be found on the USDA GAIN or FAS Japan Reports websites. As of the date of publishing, the latest report can be downloaded here.

SECTION I. MARKET SUMMARY

In 2019, the total value of all foodservice industry sales in Japan increased by 1.4 percent to JP¥33,318 billion (US$305.7 billion) from JP¥32,872 billion (US$301.6 billion) in the previous year. The Japanese HRI industry, broadly defined, has six major segments: Restaurants being the largest with nearly 44 percent of the market. The "Prepared Meals Sold at Retail Stores" segment includes ready to eat meal/home meal replacement (HMR) type products sold at Obento (lunch box) shops, convenience stores, supermarkets, and department stores. Sales in this market segment have increased by over one percent in the last three years and now account for 21.8 percent of the HRI market. Other sectors include Drinking Establishments (15 percent), Institutional Food Service (10.1 percent), Hotels (8.6 percent), and Transportation (0.8 percent).

Figure 2: Japan Foodservice Industry Market – Sales (Billion yeb

Japan HRI Market	2017			2018			2019		
Category: Sales	¥ Billion	$ Billion	Share	¥ Billion	$ Billion	Share	¥ Billion	$ Billion	Share
Restaurant	14,222	130.5	43.4%	14,299	131.2	43.5%	14,544	133.4	43.7%
Transportation	270	2.5	0.8%	271	2.5	0.8%	275	2.5	0.8%
Hotels	2,820	25.9	8.6%	2,824	25.9	8.6%	2,880	26.4	8.6%
Institutional FS	3,379	31.0	10.3%	3,361	30.8	10.2%	3,353	30.8	10.1%
Drinking Establishments	4,990	45.8	15.2%	4,967	45.6	15.1%	4,992	45.8	15.0%
HMR	7,075	64.9	21.6%	7,149	65.6	21.7%	7,275	66.7	21.8%
HRI Total:	32,756	300.5	100.0%	32,872	301.6	100.0%	33,318	305.7	100.0%

Source: Japan Food Service Association - the Food Service Research Center
Exchange rate: ¥108.99/$

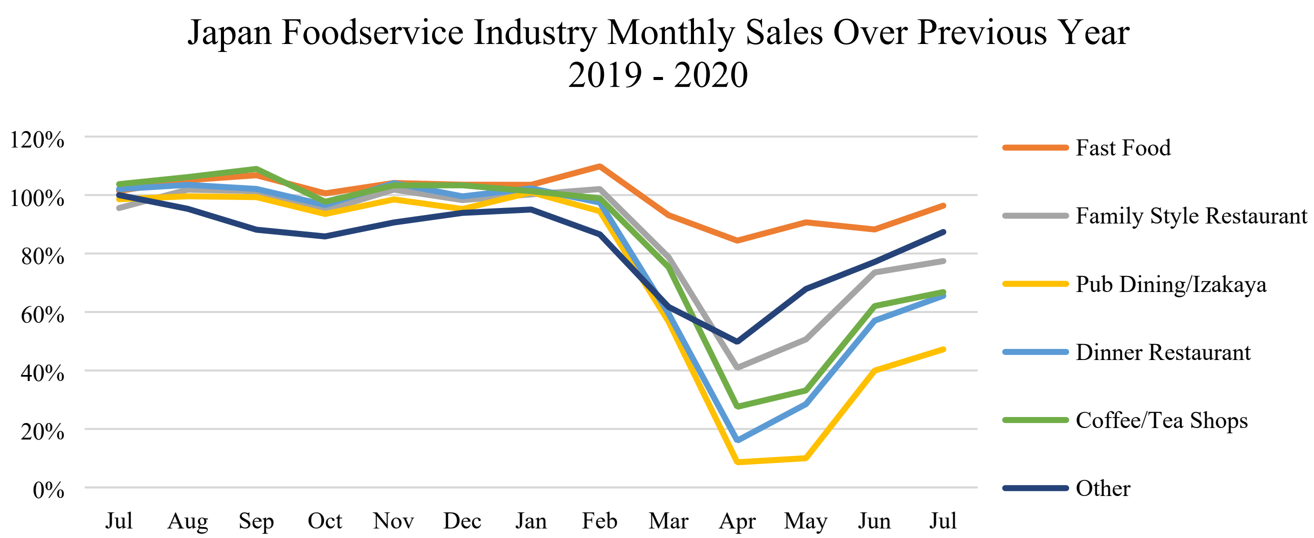
Note: In this report, the currency statistics used are converted using the 2019 average exchange rate, since year-to-year fluctuation in exchange rates can distort trends.

Year Average	2017	2018	2019
JP¥ per US$	111.19	110.4	108.99

Source: Bank of Japan, Rate of Tokyo Foreign Exchange Market

From January 2019 through February 2020, restaurant industry sales maintained strong demand and inbound tourism was near record levels with the impending Tokyo Olympic Games, even after Japan increased its Consumption Tax rate on the food at restaurants from 8 to 10 percent on October 1, 2019. However, the COVID-19 pandemic caused a sharp decline in sales across the total foodservice industry after February 2020.

The Japanese government has offered subsidies and preferential loan policies to the industries; though, many restaurants have closed due to a decrease in the number of customers and inbound tourists. According to Teikoku Data Bank, a total of 398 restaurant operators went bankrupt in the first half of 2020, a record pace. Dinner restaurants and hotel food service has been significantly damaged. During the national state of emergency, pub dining monthly sales were down 91.4 percent and 90 percent year-on-year in April and May, respectively. Domestic tourism from metropolitan areas to rural areas has also been constrained, which has a greatly impacted on the hotel and transportation industries. Fast food outlets and quick service shops that focus on take-out and delivery services have performed relatively well, though monthly sales are still down for that subsector. Business has grown significantly for Demae-kan (a food delivery operator established in 1999) and Uber Eats.



Source: Japan Food Service Association - the Food Service Research Center

According to Fuji-Keizai report, once recent positive trend is in meat consumption. From 2016 to 2020 meats (animal protein) subsectors were up 170 percent for steak restaurants, 145 percent for tonkatsu (pork cutlet) restaurants, 123 percent for hamburger businesses, and 113 percent for Chicken (fried and grilled) outlets. Chicken menus have become especially popular since the COVID-19 pandemic began. The report indicated fried chicken sales are on track to be up 20 percent in 2020 from 2019. KFC Japan sales were up 27.3 percent in July year-on-year, a record increase. Izakaya chain Watami newly opened a delivery only shop focusing on fried chicken called “Kara-age no Tensai (fried chicken genius),” and an institutional foodservice company called Arcland’s also opened fried chicken shops under the “Karayama (Mt. fried chicken)” brand.

Japan HRI industry stakeholders are pursuing new and creative ways to cope with changing consumer lifestyles and preferences during the COVID-19 pandemic; imported foods may have an important role in supporting industry adjustments.

Advantages	Challenges
Implementation of the U.S. – Japan Trade Agreement provided substantial market access to about 90 percent of U.S. agricultural products by duty free or receive preferential tariff access.	Several competing countries including Canada, Australia, Chile, Mexico, and the EU have already implemented trade agreements providing preferential tariff access.
High Japanese farming costs and decline of domestic agricultural production make imported food products vital.	Japanese buyers are now sourcing from all over the world rather than their more limited historic suppliers.
The successes of American style restaurants provides an avenue for introducing U.S. recipes and food ingredients into the Japanese diet.	Many consumers view American cuisine has a less healthy image which linked to higher rates of obesity in the United States than in Japan.
U.S. food manufacturers have a positive reputation for food safety relative to many Asian competitors, especially among the trade.	Imported food products are viewed by many consumers as less safe than domestically produced food products.
American style breakfast, brunch concepts and steak houses are catching on. These concepts help expand U.S. food product usage in the industry.	Latin American and Asian exporters have been improving distribution infrastructures and quality assurance (QA) procedures.

SECTION II. ROAD MAP FOR MARKET ENTRY

Market Entry and Structure

Generally, the first step to market entry is to find an importer, which may take a considerable amount of time. There are no magic formulas for new–to-market exporters to enter the Japanese food service market. Strategies will vary depending on the type of food product being introduced and the current competitive environment. However, there are some basic steps that new-to-market exporters are recommended to follow when they consider entering the market.

One of the fundamental steps before entering the market is to determine whether a product is authorized for sale in Japan. There could be restrictions due to phytosanitary or food safety related concerns that can prevent product from being imported. A preliminary analysis should be completed to determine market potential of products, pricing of similar products, key points of differentiation for the product compared to others, and what kind of packaging is used to sell competitor products. Product must meet Japanese regulations for food ingredients, especially regarding food additives. If the product contains prohibited ingredients it will have to be reformulated to meet the regulations. Exporters should also determine the import classification and tariff rate for products. Freight forwarders and traders can be helpful in determining the category a product belongs to.

For more information, see the latest FAS Japan Food and Agricultural Import Regulations and Standards (FAIRS) report and Exporter Guide at: http://www.usdajapan.org/reports/

Japan Customs has a website for requesting an advance ruling on tariff classifications, which is available to importers and related parties at: http://www.customs.go.jp/english/advance/index.htm

When possible, visiting Japan is recommended. The Tokyo and Osaka Agricultural Trade Offices (ATO), U.S. Agricultural Cooperator Groups, and State and Regional Trade Groups (SRTG) are available as resources for obtaining information about the market. Private companies may also be hired to do product testing among actual consumers and to gauge their reactions to product taste, appearance, and texture. Participating in one of the food related trade shows or showcases allow exporters to research a product's potential and meet Japanese importers who often do not respond to "cold calls" or requests for meetings from unknown companies. The ATO Japan offices organize U.S. pavilions at the Supermarket Trade Show in February and FOODEX Japan in March and offers support to U.S. exhibitors such as market briefings and arranging meeting space. Other smaller trade shows can also be useful, depending on the target audience.

Distribution

Japan has one of world's most developed food supply chains. One major difference with the United States is that individual restaurants tend to buy food at nearby fresh food markets, supermarkets, and/or retail stores. Chain restaurants tend to procure food from food service industry wholesalers who offer combined shipment/delivery of all kind of foods and restaurant business materials. Some of these wholesalers import food directly from foreign countries but most of them buy imported foods through trading houses, which carry out a variety of functions, including: handling documentation, clearing customs, testing for quality assurance, warehousing, and financing the inventory.

Some "cash and carry" retailers, including wholesale clubs such as COSTCO and METRO, are popular sources for food products among smaller-sized food service operators. The biggest is Gyomu Super (Business Supermarket) owned by a local company, Kobe Bussan. Additionally, regional food wholesalers have formed strategic purchasing alliances and have opened cash and carry outlets. Bulk packed meat, seafood, fresh produce, coffee, seasonings/condiments, wine, cheese, frozen vegetables, and frozen baked items are popular selling food products at these outlets. HRI-focused wholesalers are consolidating. To add value, most large wholesalers own their own distribution trucks and focus on carrying broad product lines that can provide small food service operators or small chains with one-stop service.

While online shopping has been popular for general consumers, use among the food service industry was limited to high-quality fresh seafood and fresh vegetables/fruits delivered directly from production areas to restaurants. Although the COVID-19 pandemic has accelerated online food distribution, most restaurant buyers still want to check the quality of food while visiting shops and markets. The buyers are also reluctant to pay shipping costs, in general. Japanese wholesalers include all cost in food prices and do not charge for delivery separately.

Sub-Sector Profiles – Restaurants, QSR and HMR

Restaurant sales in 2019 were up 1.7 percent to $133.4 billion in 2019. The restaurant sector includes a wide variety of operators, ranging from American-style fast food chains to more traditional family-owned single-outlets restaurants.

General restaurants by far makeup the largest portion of the sector and include a broad range of upscale and casual restaurants, family-style restaurants, and Japanese, Chinese, and Western-style restaurants. Sales at general restaurants increased by 1.6 percent in 2019. Sales at noodle and sushi shops increased 0.9 percent and 0.2 percent respectively. Other restaurant increased by 4.9 percent on strong sales by quick-service restaurants (QSR). General restaurants offer the greatest opportunity for most U.S. food exporters and includes casual and family-style restaurants, many of which serve Western dishes or specialize in specific types of food such as steak, “Hamburg” (meatloaf/Salisbury steak), pizza, or pasta. Their menus rely heavily on imported food products to provide authenticity as well as taste. Large family restaurant chain such as Skylark, Royal Host, Denny’s, Saizeriya (Italian-style), Jonathans and Gusto, are major users of imported U.S. food ingredients including items such as beef, pork, frozen French fries, and vegetables.

Restaurant Sub-Sector	2017			2018			2019		
Sales	¥ billion	$ billion	Share	¥ billion	$ billion	Share	¥ billion	$ billion	Share
Total	14,222	130.5	100.0	14,299	131.2	100.0	14,544	133.4	100.0
General Restaurants	10,116	92.8	71.1	10,125	92.9	70.8	10,291	94.4	70.8
Noodle shop	1,286	11.8	9.0	1,302	11.9	9.1	1,313	12.0	9.0
Sushi shop	1,523	14.0	10.7	1,543	14.2	10.8	1,546	14.2	10.6
Other restaurants	1,297	11.9	9.1	1,329	12.2	9.3	1,395	12.8	9.6

The Food Service Research Center categorizes several special food service concepts into its “Other Restaurants” category. These include both Western-style and Japanese style quick-services (QSR) such as hamburger shops, pizza delivery shops, fried chicken shops, donuts and ice-cream shops, and also beef bowl, curry and rice, okonomiyaki (pancake-like traditional Japanese food filled with meat, vegetables and/or seafood. The QSR category sales remained relatively stable during COVID-19 due to takeout offerings.

Gourmet hamburger outlets have begun to take root. These gourmet burgers differ their quality from QSR burger shops by using U.S. instead of Australian beef. Shake Shack, Carl’s Jr., and Umami Burger are popular among young professionals and highlight the diversity and quality of American cuisine. They are ideal targets for U.S. exporters, and typically import many of their food items, including frozen potatoes, pork patties, fresh tomatoes, and cut lettuce. The pizza industry sources toppings from abroad, including tomato sauce, either as tomato chunks or paste, and shredded cheese.

The prepared meals sold at retail stores (Home Meal Replacement – HMR) sector has grown rapidly in recent years. ATO Tokyo developed and released the most recent HMR sector report, available here.

Major Food Service Companies

Top Ten Restaurants (Source: Nikkei MJ Newspaper)

1. McDonald Japan (QSR)
2. Zensho Holdings (beef bowl & etc.)
3. Skylark Holdings (restaurants)
4. Colowide (pub dining & etc.)
6. Plenus (bento & restaurants)
7. Dotour (coffee shops)
8. Create Restaurants (pub dining & etc.)
9. KFC Japan (QSR)

5. Sushiro (sushi casual)
10. Kura Zushi (sushi casual)

Top Five Institutional Food Service (Source: Nikkei MJ Newspaper)
1. Nisshin Healthcare Hood Service
2. Aim Service
3. LEOC
4. Fuji Sangyo
5. Uokuni Sohonten

Top Ten Hotel Chains with Food Service (Source: Fuji Keizai Foodservice Industry Handbook 2020)
1. Prince Hotel
2. Marriott International
3. Okura Nikko Hotel Management
4. Hotel New Otani
5. Hanshin-Hankyu Hotel Group

SECTION III. COMPETITION

The United States is the top agricultural supplier to Japan and known as a reliable exporter that provides safe and high-quality foods. On January 1, 2020, the USJTA entered into force. Now nearly 90 percent of U.S. agricultural products are either duty free or receive preferential treatment, making U.S. products more competitive with other suppliers that have implemented free trade agreements with Japan, including the European Union, Canada, Australia, Chile, and Mexico.

The United States competes intensively with Canada in the chilled pork sector. The U.S. share of the frozen pork has fallen to 10 percent while competitors such as Spain, Denmark, and Mexico have increased their total share to 57 percent. The United States competes in the beef market with Australia. U.S. wheat accounts for roughly half of Japan's annual wheat imports, with Canada and Australia making up the other half. Soybean imports are primarily from the United States on a value basis at approximately 70 percent, with Canada being the main competitor for food-grade soybeans. The EU, New Zealand, and Australia lead in the supply of cheese, while the U.S. market share is just 12 percent. The United States' main competition in vegetables and fruit is regional, with China primarily suppling on proximity, price competitiveness, and varietal preferences.

Figure 3: Japan Imports of Agricultural Products in 2019

Partner Country	United States Dollars (Billions)			% Share			% Change
	2017	2018	2019	2017	2018	2019	2019/2018
World	51.9	53.8	54.1	100.0	100.0	100.0	0.6
United States	12.7	13.8	12.8	24.5	25.7	23.7	- 7.2
China	6.2	6.5	6.3	11.9	12.1	11.6	- 3.1
Australia	4.0	4.3	4.2	7.7	8.0	7.8	- 2.3
Thailand	3.9	4.0	4.0	7.5	7.4	7.4	-
Canada	3.5	3.7	3.8	6.7	6.5	7.0	2.7

Brazil	2.5	2.1	3.1	4.8	3.9	5.7	47.6
France	1.6	1.7	1.8	3.1	3.2	3.3	5.9
New Zealand	1.4	1.5	1.6	2.7	2.8	3.0	6.7

Source: Trade Data Monitor: BICO Agricultural Products

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Products Present in the Market which have Good Sales Potential
With the implementation of USJTA, USDA Japan published one-page fact sheets to highlight key product categories that received preferential tariff treatment in the agreement (linked in the table below). More information on tariff treatments may be found at USDAJapan.org.

Beef & Beef Products	Demand for U.S. lean beef and products continues to increase, mainly through the food service and restaurant channels. This longstanding growth can be attributed in part to Japan's aging population and single-person households, coupled with health-conscious attitudes. New and existing restaurant chains that feature U.S. beef are expanding. For more information, see JA9105.
Pork & Pork Products	Japan imports around 50 percent of its pork supply. Pork is one of the most popular protein choices for Japanese households and is likely to overtake fish as the most consumed protein within the next few years. Ground seasoned pork (GSP) is a key ingredient for domestic sausage manufacturers. For more information, see JA9105.
Processed Vegetables	After China, the United States is the second largest supplier of processed vegetables, with roughly 20 percent of the import market share in volume. The United States is a major supplier of prepared potatoes, tomato paste, and prepared sweet corn. Higher consumption of home-meal replacements is expected to bolster producer demand for processed vegetables. For more information, see JA9710.
Wheat and Wheat Products	U.S. food wheat is a key ingredient in Japanese bakery and noodle production. USJTA provides tariff parity with competing food wheat suppliers such as Australia and Canada. It also gives the United States a tariff advantage over Turkey, one of the leading pasta suppliers. Pasta is the primary wheat product imported by Japan. For more information, see JA2020-0058.
Fresh & Processed Fruit	Japan imports one-third of its fresh fruit and 90 percent of its processed fruit, with the United States ranked as the second largest supplier for each. Opportunities for U.S. fresh fruit exports to Japan are expected to increase due to falling domestic production. The United States supplies large quantities of raisins and prunes as well as frozen blueberries and strawberries. For more information, see JA8706.
Tree Nuts and Peanuts	U.S. tree nuts are increasing in popularity in the convenience health snack sector, as detailed in JA9502. Almonds, walnuts, pecans, and peanuts, in plain, roasted and salted forms, are common in single-serve snack packaging at convenience stores across Japan. The Japanese food service industry is beginning to explore new salad creations that incorporate tree nuts.
Whiskey	In 2019, increased domestic consumption and surging global demand for Japanese whiskies led to a record $429.3 million in imports, which are often blended and

	bottled by local producers. U.S. whiskey exports to Japan reached a record $121.9 million and accounted for 88 percent of total spirits shipments. For more information, see JA2020-0053.
Wine & Beer	Wine consumption in Japan has risen steadily over the last decade. Total imports were valued at $1.8 billion in 2019. For more information, see JA9501. In 2019, the United States became the largest supplier of beer by value at $15.6 million, due to premium craft beer sales. For more information, see JA8507.
Cheeses	Nearly 90 percent of cheese consumed in Japan is imported. Cheese consumption has grown continuously since 2013. Consumption has traditionally focused on domestically produced processed cheese products which use imported natural cheese as ingredients. Popular processed products include sliced cheese, cheese sticks, and bite-sized cheese wedges. For more information, see JA2019-0183.

Top Consumer-Oriented Products Imported from the World
- Pork and Pork Products
- Chicken and Chicken Products
- Beef and Beef Products
- Wine

Top Consumer-Oriented Products Imported from the United States
- Pork and Pork Products
- Beef and Beef Products
- Frozen Potatoes
- Tree Nuts

Products Not Present in Significant Quantities which have Good Sales Potential
Japan imports a broad array of products representing the full spectrum of America's consumer-ready, intermediate, and bulk food production. However, Japanese importers and consumers frequently seek new, trendy, and innovative products. Opportunities may be found at any time for competitively-priced, quality, or novel products, e.g. alternative meat (plant based protein) products, prepared chicken, craft beer and spirits.

Products Not Present Because They Face Significant Barriers
- Fresh Potatoes

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Reports from USDA Japan, including the Agricultural Trade Offices and the Office of Agricultural Affairs, are frequently updated and can be found by searching the FAS Japan Reports website.

ATO Tokyo
U.S. Embassy
1-10-5, Akasaka, Minato-ku, Tokyo 107-8420
Tel: 81-3-3224-5115
Fax: 81-3-3582-6429

E-mail address: atotokyo@fas.usda.gov

ATO Osaka
American Consulate General
2-11-5, Nishi Tenma, Kita-ku, Osaka City, Osaka 530-8543
Tel: 81-6-6315-5904
Fax: 81-6-6315-5906
E-mail address: atoosaka@fas.usda.gov

USDA Japan Online
http://www.usdajapan.org/ (FAS Japan, English)
https://twitter.com/usdajapan (FAS Japan, English)
https://ustr.gov/usjta (USJTA, English)

Japan External Trade Organization (JETRO)
Japanese market and regulations: https://www.jetro.go.jp/en/reports/
Japan Food Sanitation Law: http://www.jetro.go.jp/en/reports/regulations/
Specifications and Standards for Foods, Food Additives, etc. under the Food Sanitation Law: http://www.jetro.go.jp/en/reports/regulations/

Ministry of Agriculture, Food and Forestry:
U.S. laboratories approved by the Japanese Government, visit http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf.
Statistics and articles: http://www.maff.go.jp/e/index.html

Japan Customs
Tariff rates in Japan are calculated on a CIF basis and Japan adds an 8% consumption tax to all imports.
Japan tariff rates are found here: http://www.customs.go.jp/english/tariff/

Sources for Retail Market Figures:
METI, Large-scale retail sales trade, Part 3- Table 1, Report on the Current Survey of Commerce.
METI, Convenience store, Part 4- Table 1, Report on the Current Survey of Commerce.
METI, Drug Store, Table Part 4-Table 1, Report on the Current Survey of Commerce.

Attachments:

No Attachments