Japan's Fastest-Growing Industries 2025 in the $11.3 Trillion Japanese Market in the era of Agentic AI

From the manufacturing to the non-manufacturing sector, who's who in Japan?

– CEO Brief

Japan Special Report

Flagship Edition 2

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Who's Who in Japan's $11.3 Trillion market?

The Japanese Market's Growth Trends, CEO Brief

01 Growth Trends Analysis 2020-25

- Japan's average growth rate vs the Manufacturing sector
- Japan's average growth rate vs the Non-manufacturing sector
- Each industry's growth rate vs its relevant sector's rate

02 Japan's Growth Medalists 2025™

- Which Japanese industries exceeded the national average growth rate?
- How huge is the growth rate gap among the growth medalists
- How much was the highest growth rate reached by growth medalists

Japan's Fastest-Growing Industries 2025 in the 11.3 Trillion Japanese Market in the age of Agentic AI…

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Who’s who in Japan’s $11.3 trillion market?

Brief Executive Summary

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Executive Summary: Japan's Fastest-Growing Industries 2025 in the $11.3 Trillion Japanese Market in the age of Agentic AI

- Japan's total market reached **$11.3 trillion in sales (gross output)** in FY2024-25, a figure **strategically distinct from GDP ($4.3 trillion)** and critical to avoid misreading market opportunity through misguided conflation.
- The national average sales growth grew at the same 3.6% over the past two fiscal years, with a 5-year average of 2.9%, establishing the baseline for competitive strategy.
- The manufacturing sector outperformed the non-manufacturing sector in FY2024-25, growing at 4.5% versus the non-manufacturing sector's 3.3% — the latter declining 13% year-over-year.
- The Electricity industry claimed **Japan's Growth Gold Medal 2025™**, expanding at **3.4 times the national average(3.6%) in FY2024-25 and sustaining double-digit average growth over five years.**
- The Food industry earned the **Growth Silver Medal 2025™, surging 10% in FY2024-25** — far exceeding its 5-year average — and growing in line with the broader manufacturing sector over time.
- **Fabricated Metal Products and the Services industry jointly secured the Growth Bronze Medal 2025™, each growing at approximately 2.4 times Japan's national average.**
- **Ten industries in total outperformed the national average**, including Transportation Equipment (7.2%), Information & Communications (6.9%), Real Estate, Chemicals, and Electrical Machinery.

Brief Executive Summary: Cont'd

- The Transportation Equipment industry posted its third-best growth year (7.2%) in FY2024-25, consistently outpacing the manufacturing sector both annually and over the 5-year period.
- The Electrical Machinery and Supplies industry recorded its fastest growth year at 5.5% in FY2024-25, a sharp acceleration from its modest 5-year average of just 0.9%.
- Underperformers include General-Purpose Machinery (-7.1% in FY2024-25), Transport & Postal Services (0% growth), and Petroleum & Coal (negative growth for two consecutive years).
- The IT Hardware industry nearly matched Japan's average growth rate (3.4% vs. 3.6%) in FY2024-25, but fell well short of its own 5-year average of 6.1%, signaling a deceleration.
- The Iron & Steel industry struggled in recent fiscal years but maintained a strong 5-year average of 6.4%, reflecting high volatility rather than structural decline.
- **Japan's total net assets stood at $30.4 trillion in FY2024-25, with total sales (gross output) of $11.3 trillion, of which manufacturing accounted for $3.06 trillion and non-manufacturing for $8.24 trillion..**
- **Strategic prioritization should focus on the top-tier growth medalists — Electricity, Food, Fabricated Metals, and Services — as the highest-conviction growth opportunities in Japan's evolving AI-era economy.**

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Who's who in Japan's $11.3 Trillion market?

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Japan’s TOP 10 Industries with Performance Exceeding the National Average (see the last section for growth rates)

The TOP 3 Leading Industries Among Japan's Growth Medalists 2025™

The next excellent group of industries

- Transportation Equipment (automotive) **#5**
- Information and Communications (IT) industry **#6**
- Goods rental and Leasing **#7**

Last top performers

- Chemical and Allied Products (pharma) **#8**
- Electrical Machinery, Equipment and Supplies **#9**
- Real estate industry **#10**

The Top 3 Growth Medalists

- Production, Transmission and Distribution of Electricity **#1**
- Food industry **#2**
- Fabricated Metal Products **#3**
- Services industry **#3**

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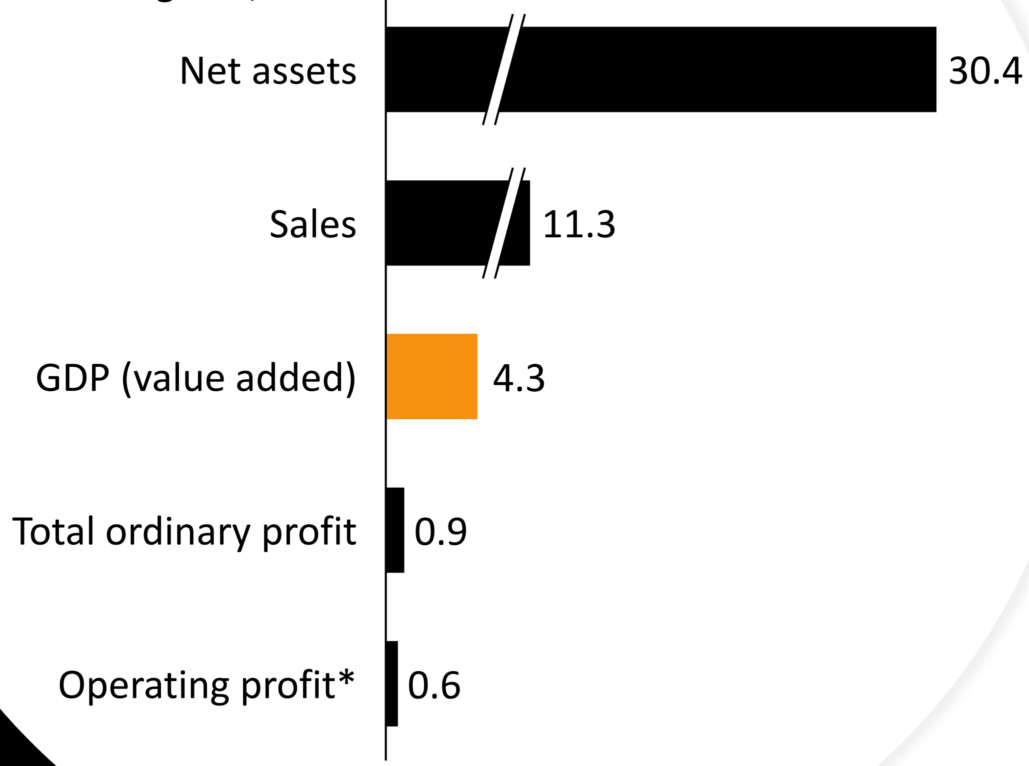
The Land of the Rising Sun by the Numbers
in the age of Agentic AI

Japan by the numbers (FY2024-25)

All figures, $trillion



Key insights

- **Japan's growth strategy Rule #1**
  - **Do not conflate Japan's GDP with the Japanese market ($11.3 sales or gross output)**
  - Indeed, the conflation can be the biggest strategic blunders
  - By either losing opportunities or writing off Japan by thinking Japan's GDP is equal to the total sales in the Land of the Rising Sun
- **The same thing is true of other countries around the world**
- **The US's GDP 2024 $29 trillion with total sales (gross output) of $53.4 trillion**

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Sources: Japan METI, Japan official stats, the US Federal Reserve Bank of Saint Louis, Cissoko & Company Intelligence Note: Total operating profit does not include finance & insurance industry

Japan’s average sales growth rate over the past five years stood at 2.9% and remained flat (3.6%) over the past two fiscal years through 2025.

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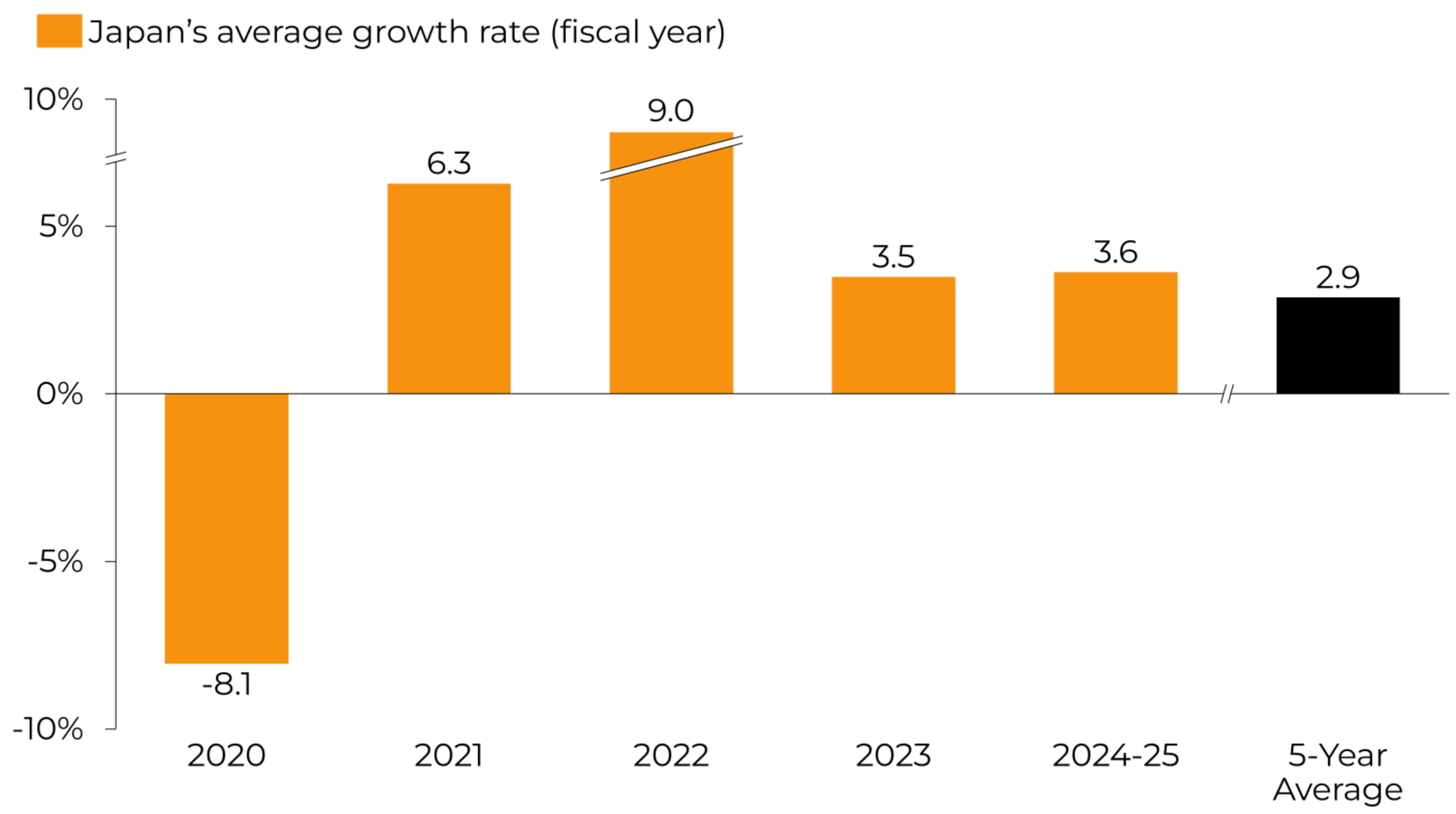
Who’s who?



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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s non-manufacturing sector

Agenda

01 Sector’s growth trends over the past 5 years

02 A comparative analysis of each industry’s growth rate across the sector versus the non-manufacturing sector

03 A Comparative analysis of growth across the non-manufacturing sector versus Japan’s growth rate

04 What’s the sector’s 5-year average growth rate?

05 How does the sector stack up?

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Japan's non-manufacturing sector sales growth declined 13% to 3.3% in FY2024-25, yet outperformed the sector's 5-year average.

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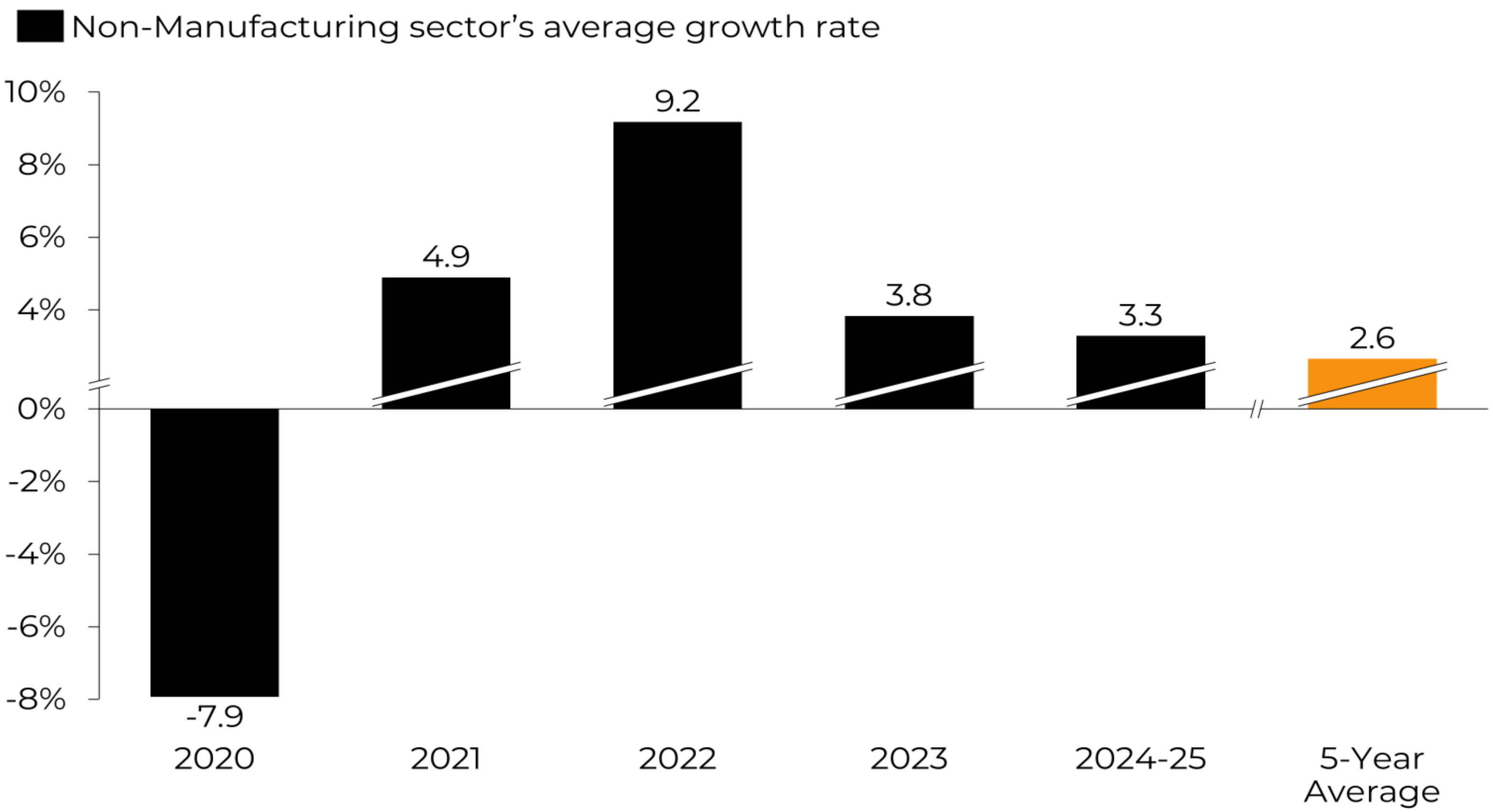
Who's who?



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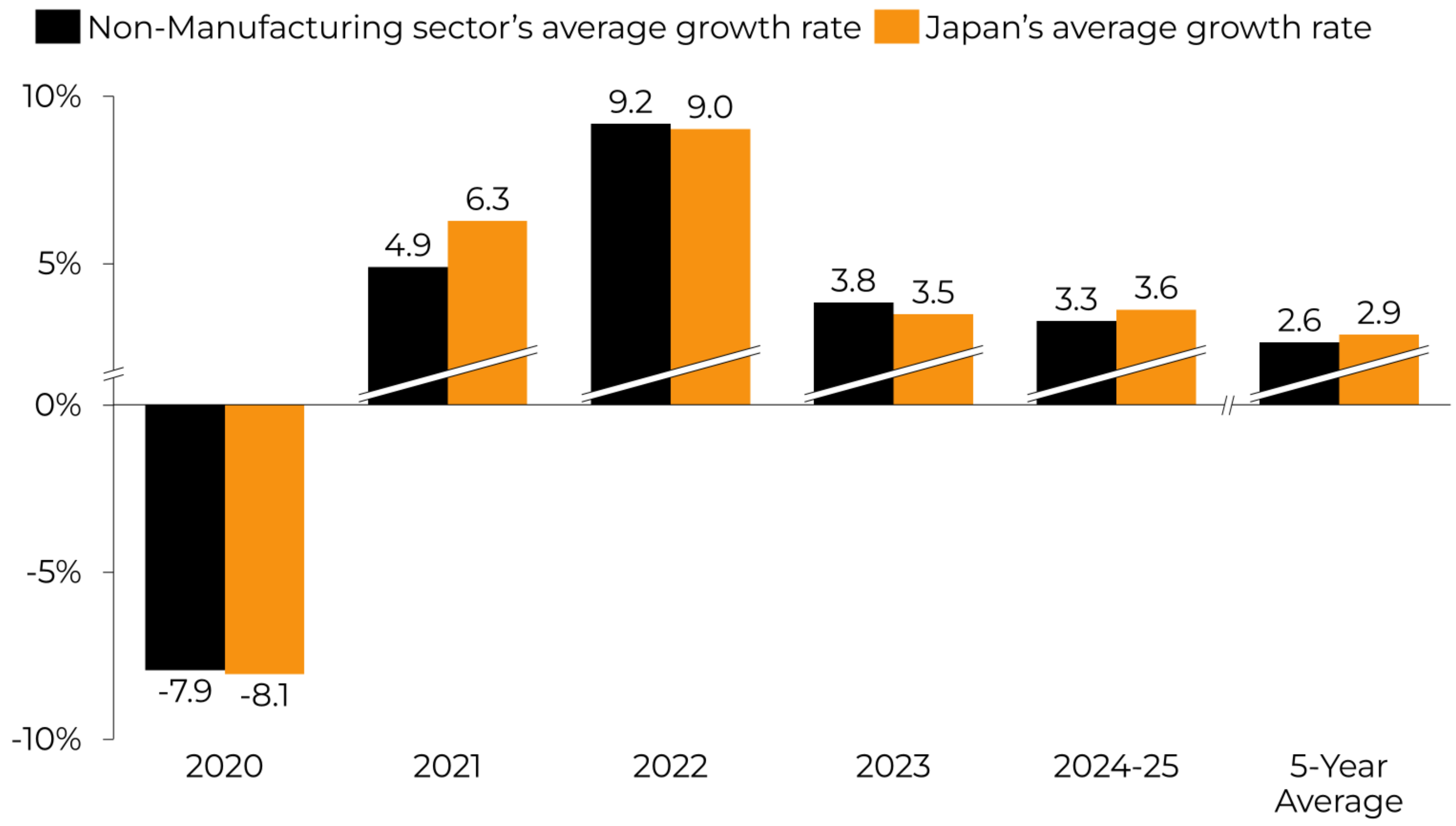
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include finance & insurance industry

Japan's sales growth rates outperformed the non-manufacturing sector in fiscal year 2024-25 and on a five-year average basis.

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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Who's who in Japan's $11.3 trillion market?

Japan’s construction industry

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  - How does it compare to the non-manufacturing industry?

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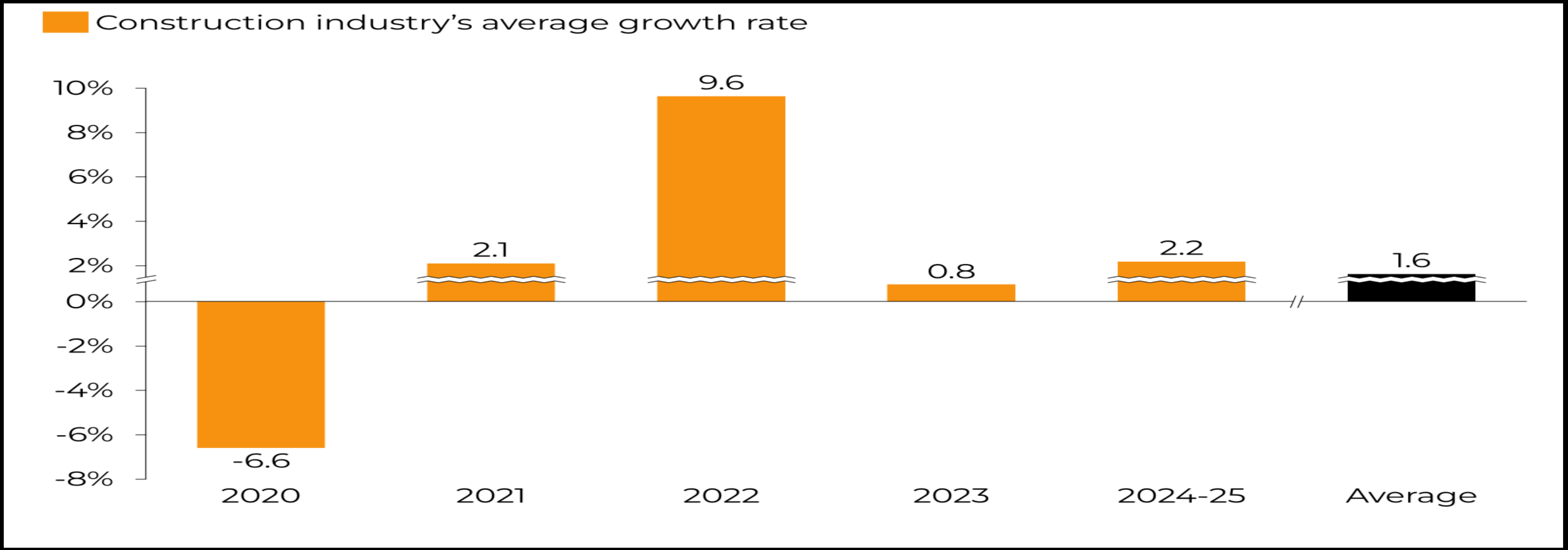
Japan's construction industry recorded 2.2% revenue growth in fiscal year 2024-25, surpassing its 5-year average of 1.6%.

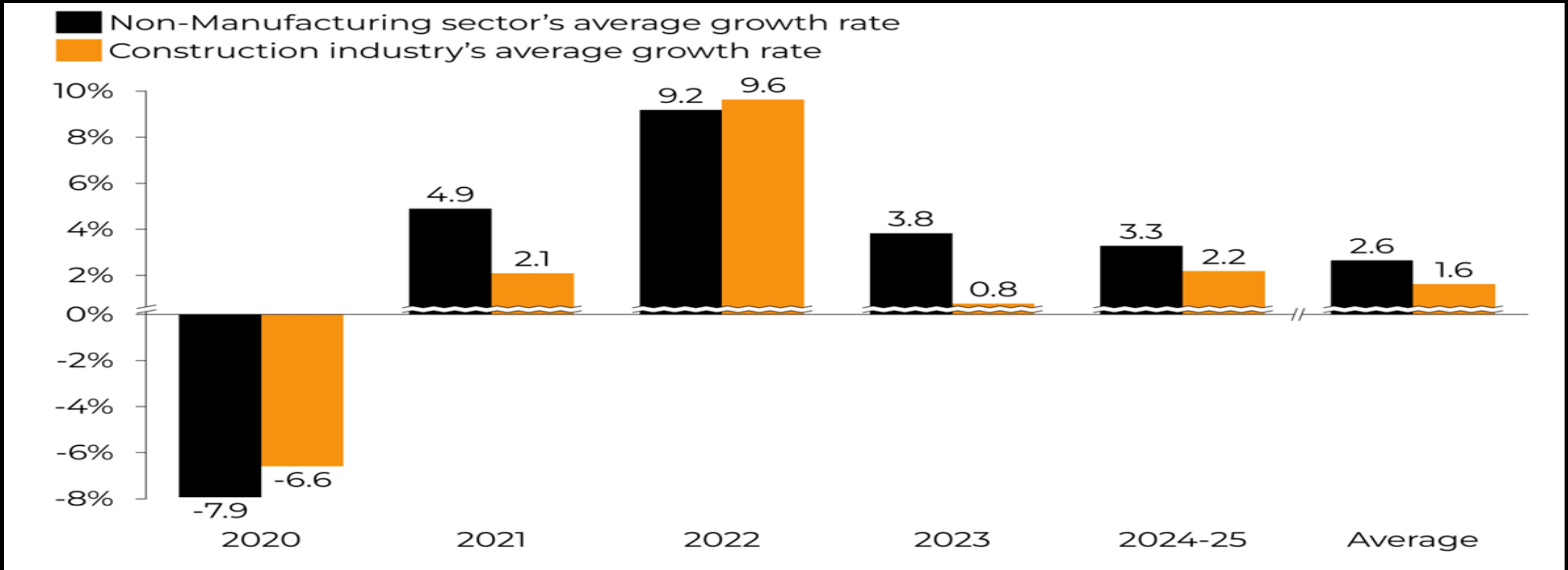
Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s construction industry’s growth performance was lower than the non-manufacturing sector in the FY2024-25, and on average over the past 5 years.

Who’s who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s Wholesale and Retail

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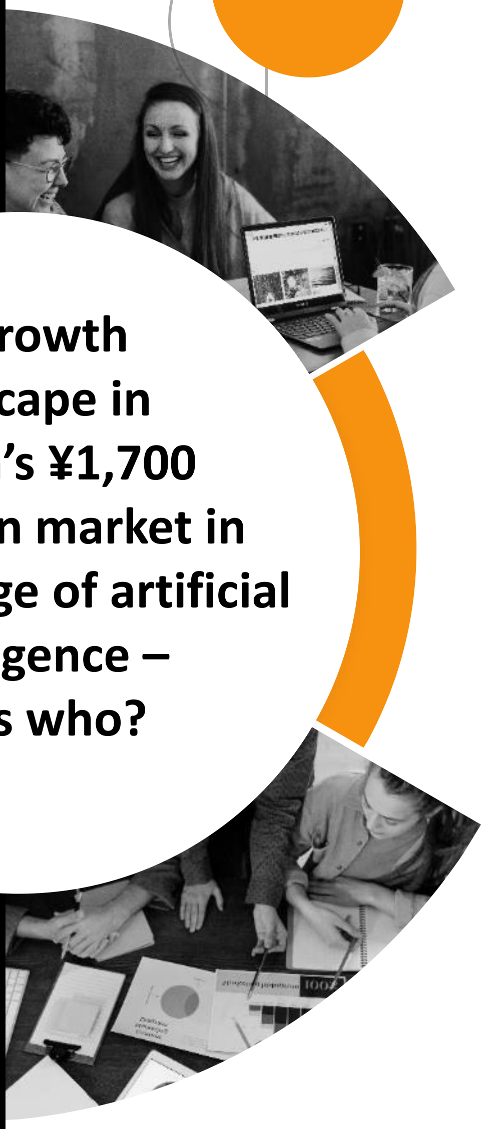
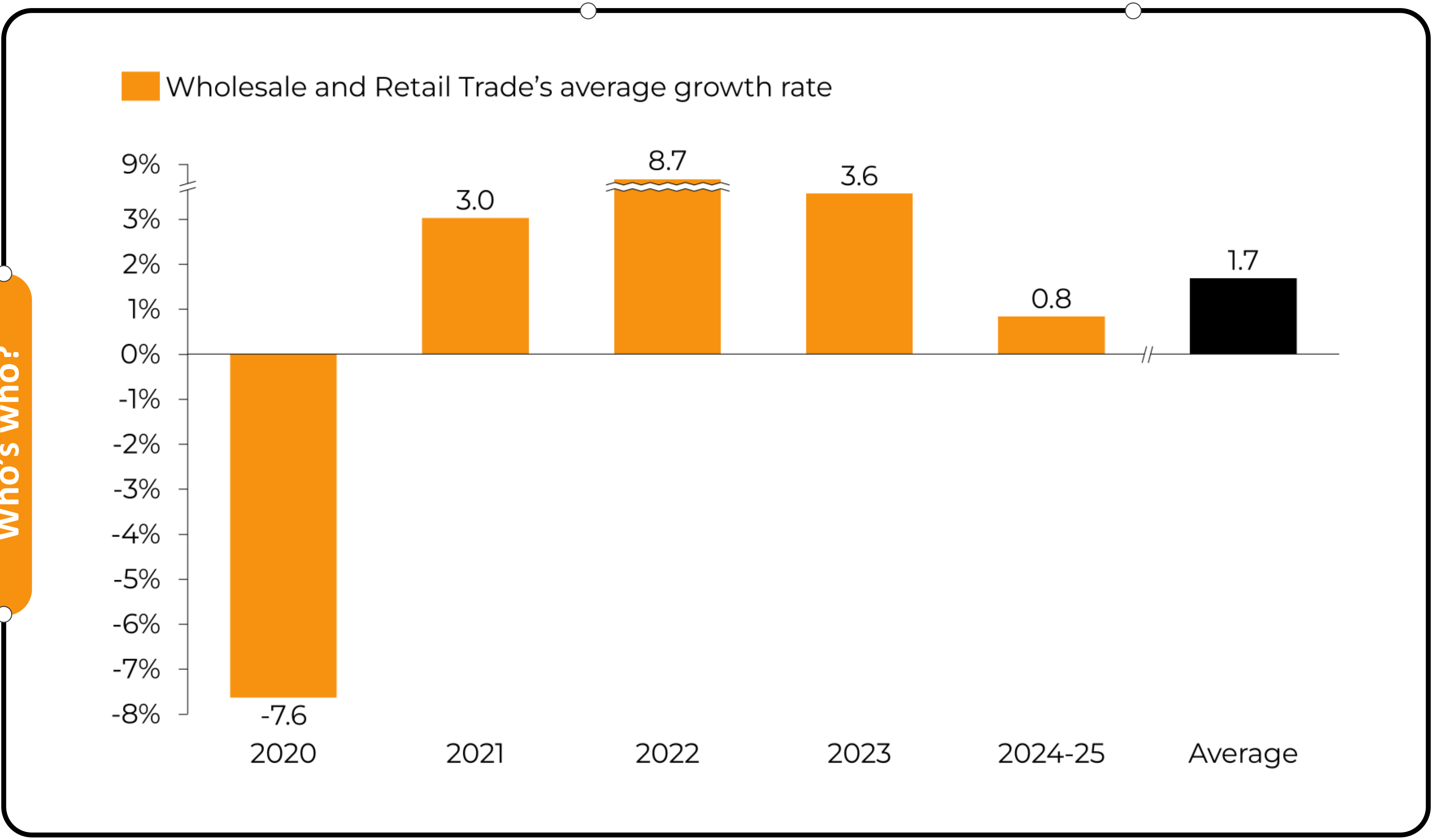
Japan's sales growth rates surpassed the non-manufacturing sector in the fiscal year 2024-25, and on average over the past 5 years.



The growth landscape in Japan's ¥1,700 trillion market in the age of artificial intelligence – Who's who?

Who's who?



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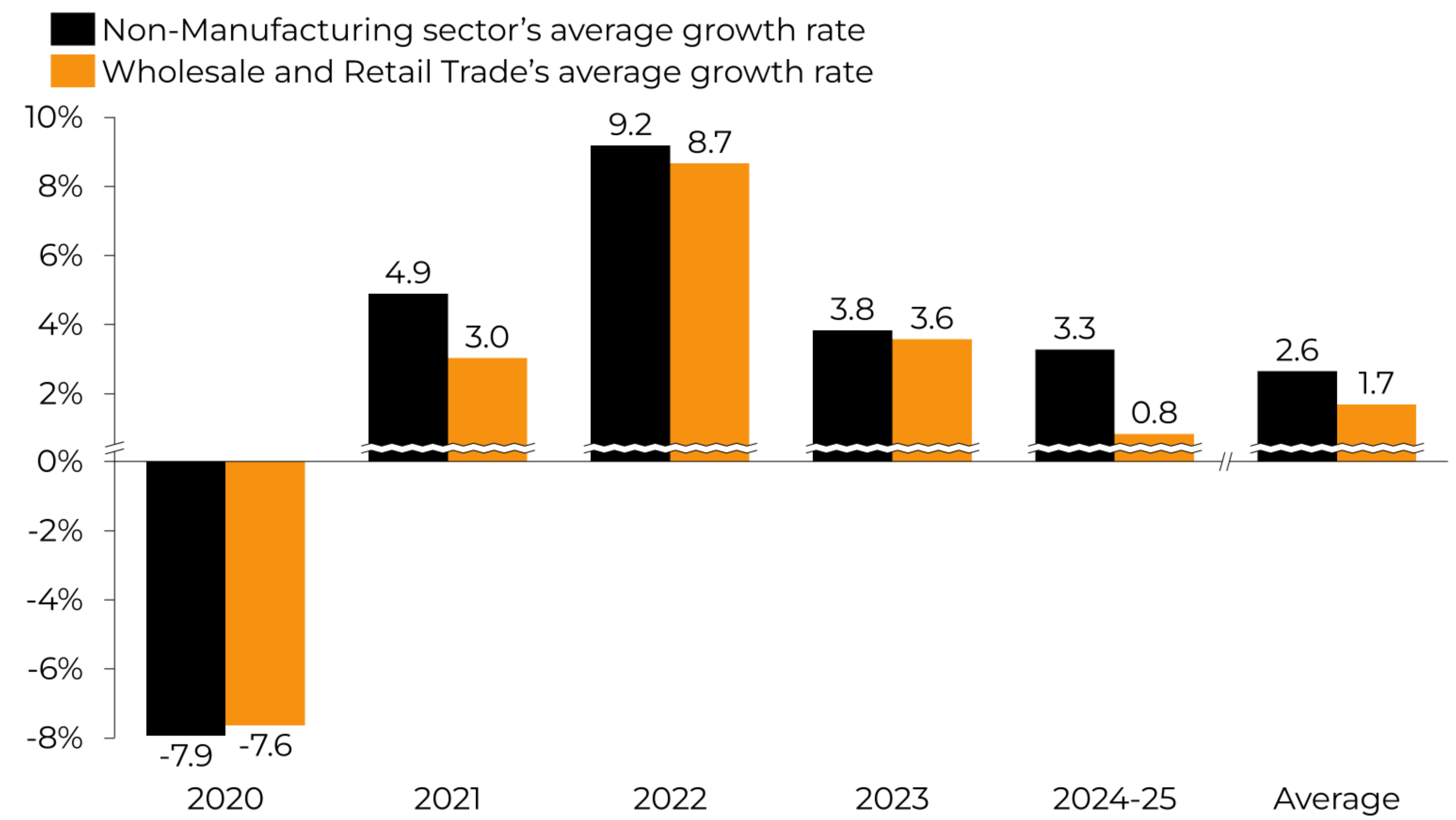
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan's wholesale and retail trade industry's sales grew lower than the non-manufacturing sector in the FY2024-25, and on average over the past 5 years.

The growth landscape in Japan's ¥1,700 trillion market in the age of artificial intelligence – Who's who?

Who's who?



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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s Real Estate Industry

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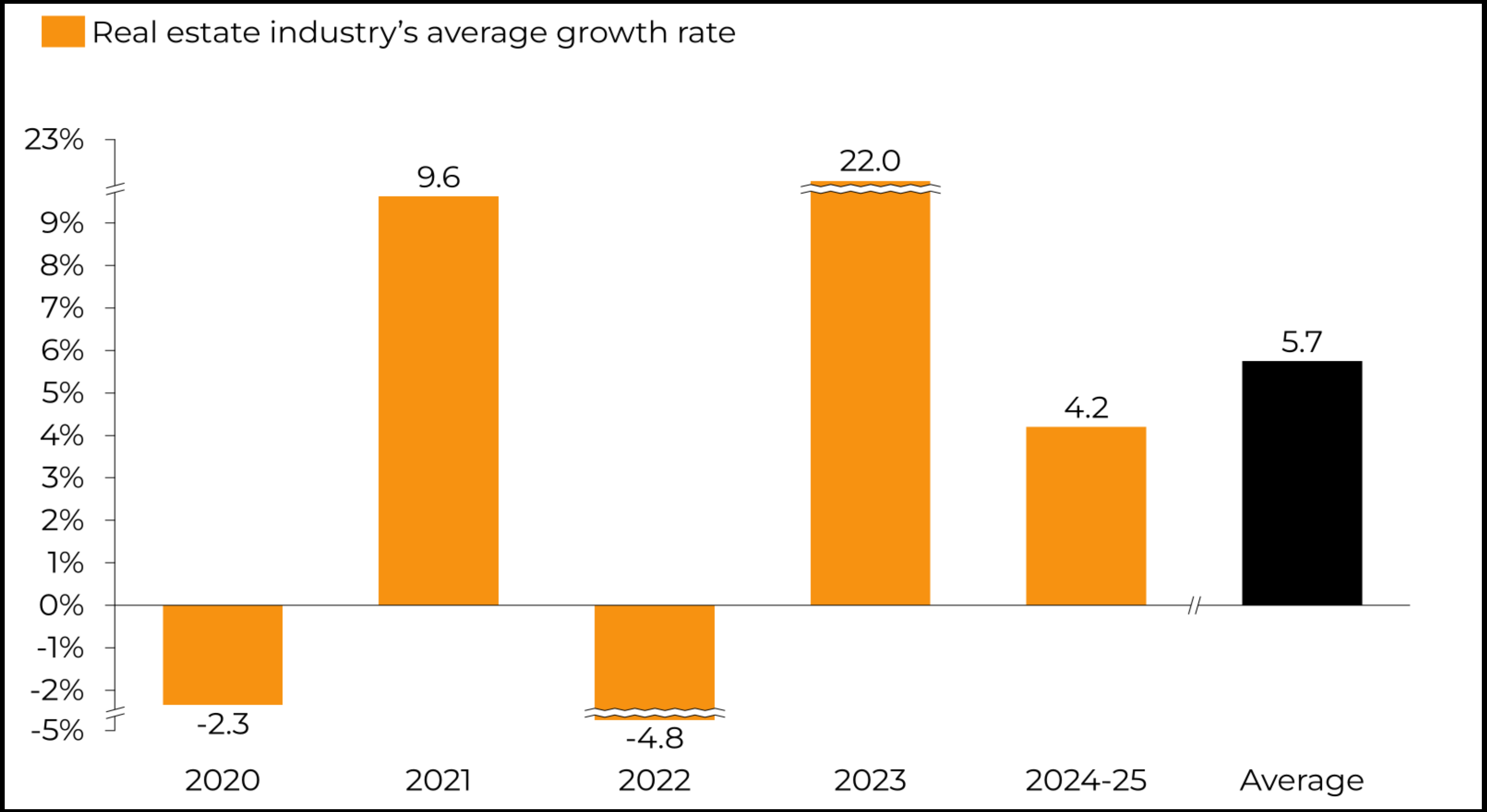
Japan’s real estate industry is among the top growth performers in Japan in both FY2024-25, and on average over the past 5 years.

Who’s who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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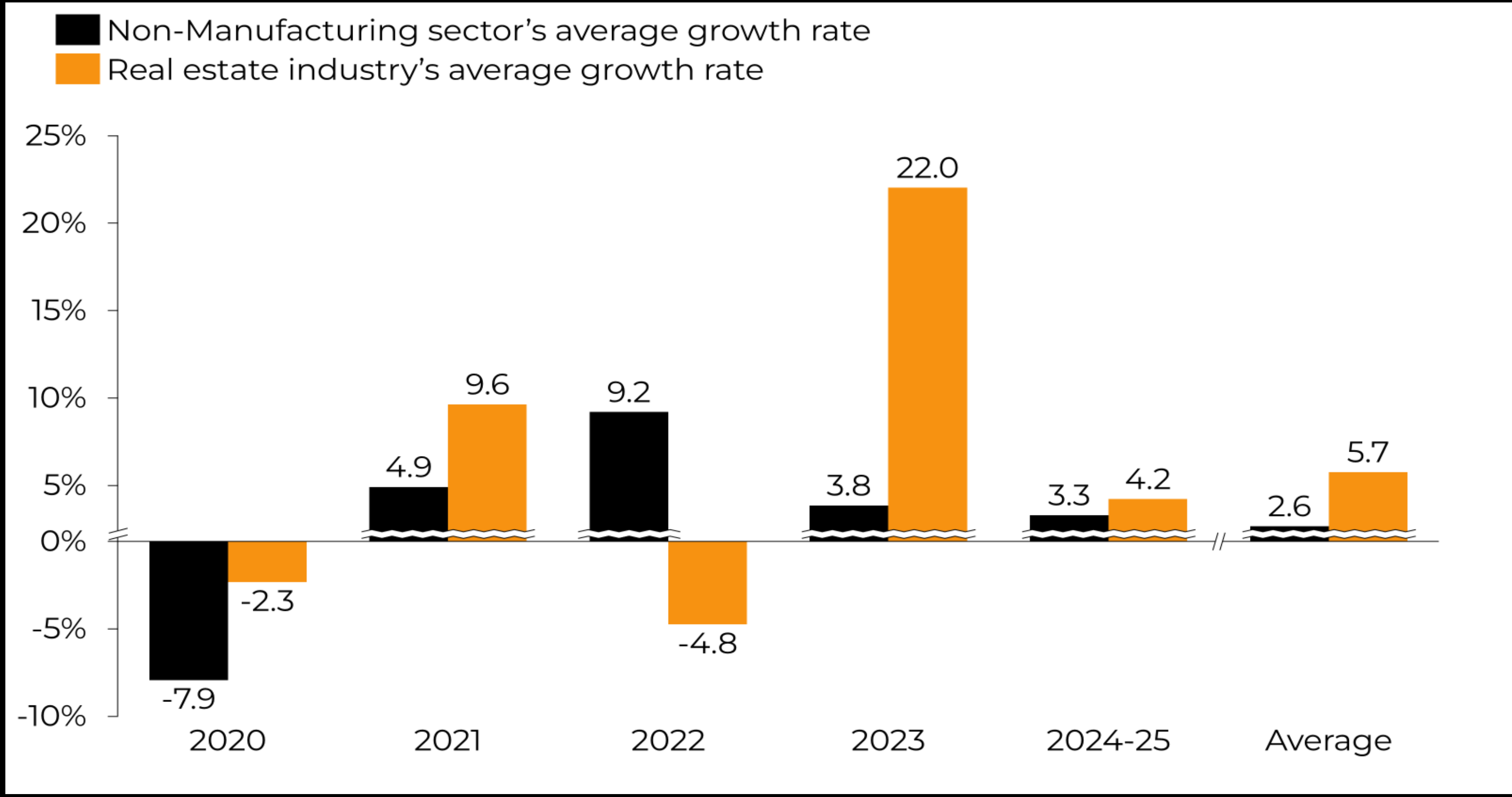
Japan's real estate industry's growth rate beat the non-manufacturing sector in FY2024-25, and on average over the past 5 years.

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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Japan’s Goods Rental & Leasing

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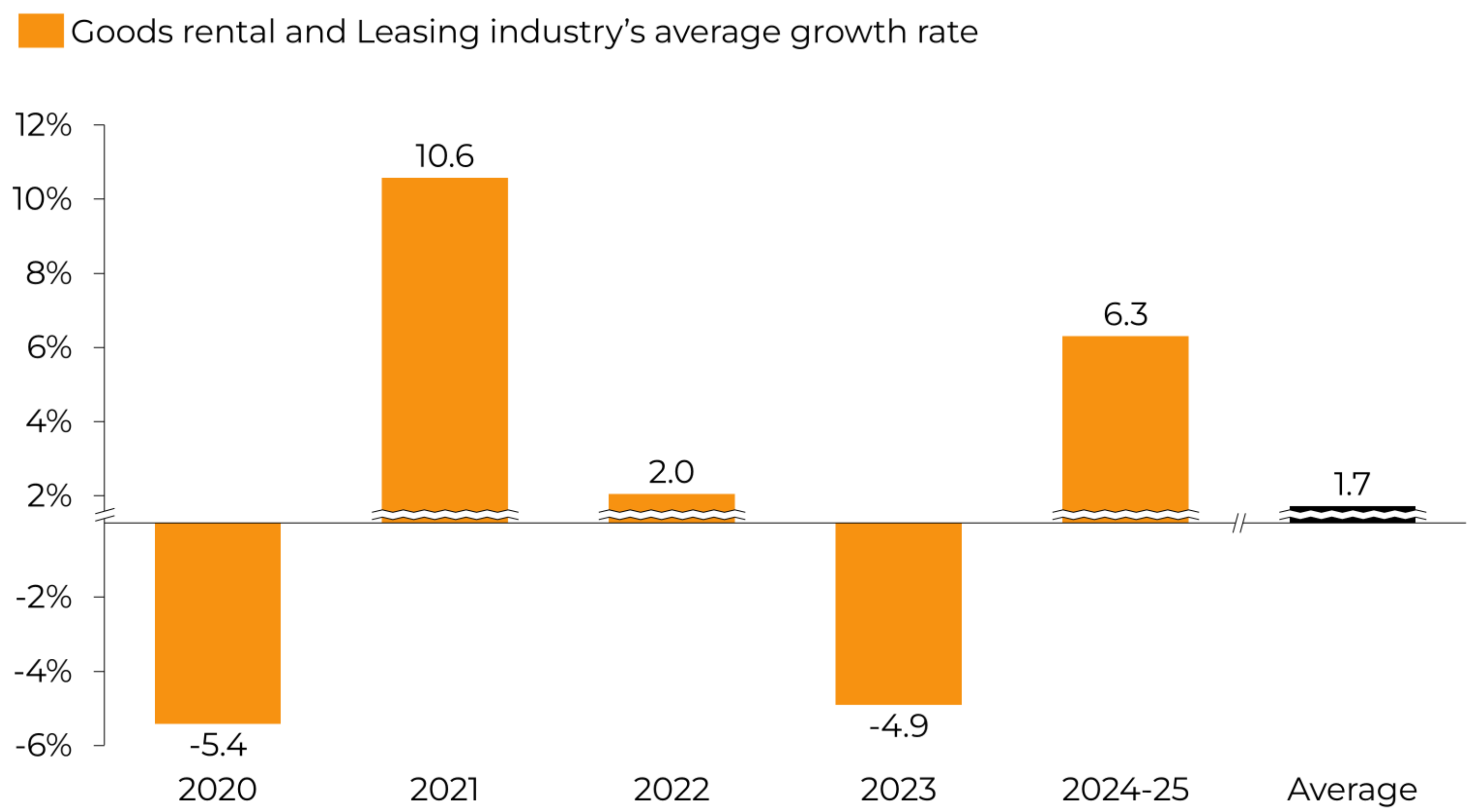
Japan’s rental and leasing industry was among the top growth performers in the FY2024-25, but given the volatility of its growth, it grew on average at 1.7%

Who’s who?



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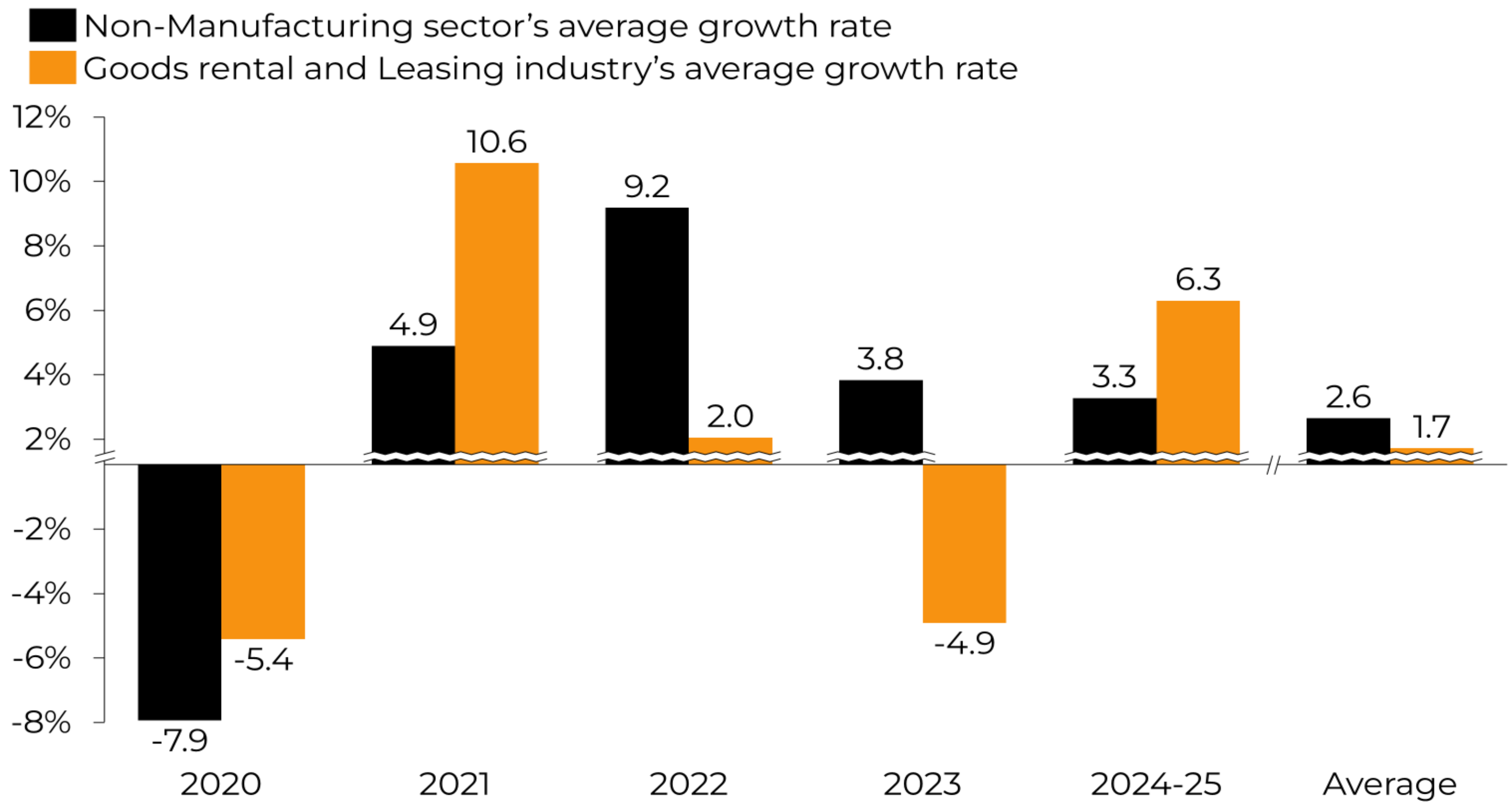
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s rental and leasing industry grew faster than the non-manufacturing sector in the FY2024-25, but its growth was lower on average over 5 years.

Who’s who?



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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

The Information & Communications Industry in the age of Agentic AI

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Growth and Comparative Analysis

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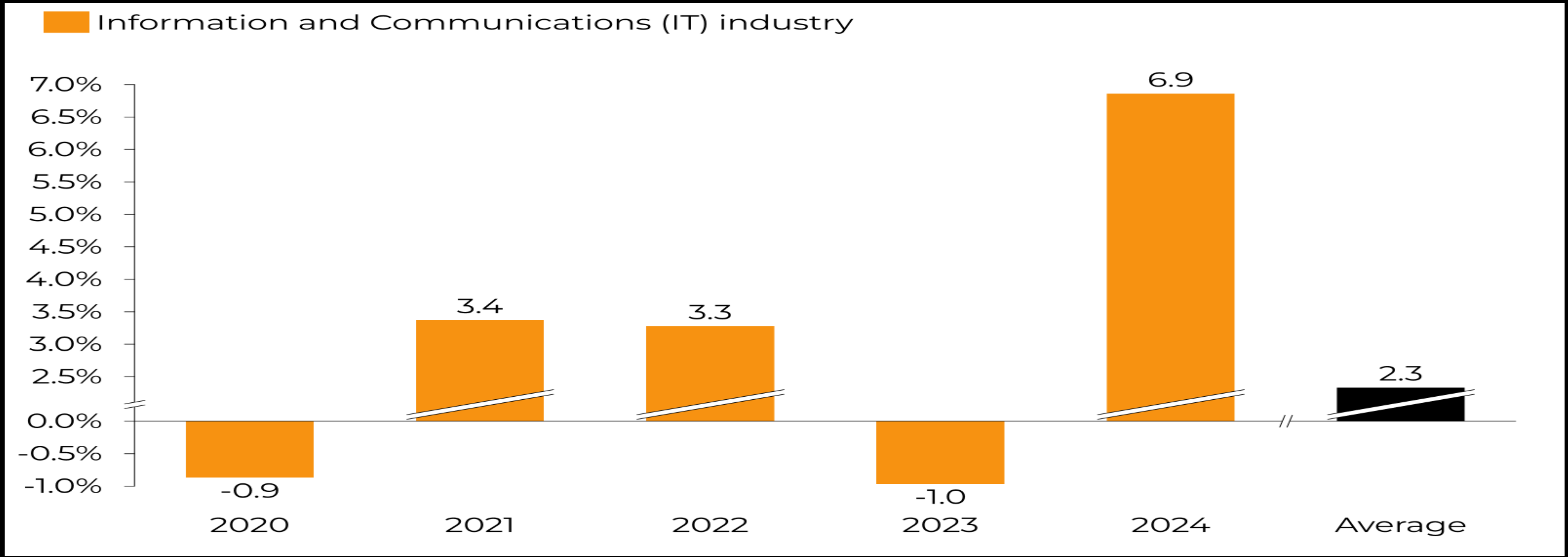
The information and communications industry was among the top growth performers in FY2024-25 (6.9%), which was better than its 5-year growth average.

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

While the IT industry’s growth rate exceeded the non-manufacturing sector in the FY2024-25, on average, their growth rates are almost the same over 5 years.

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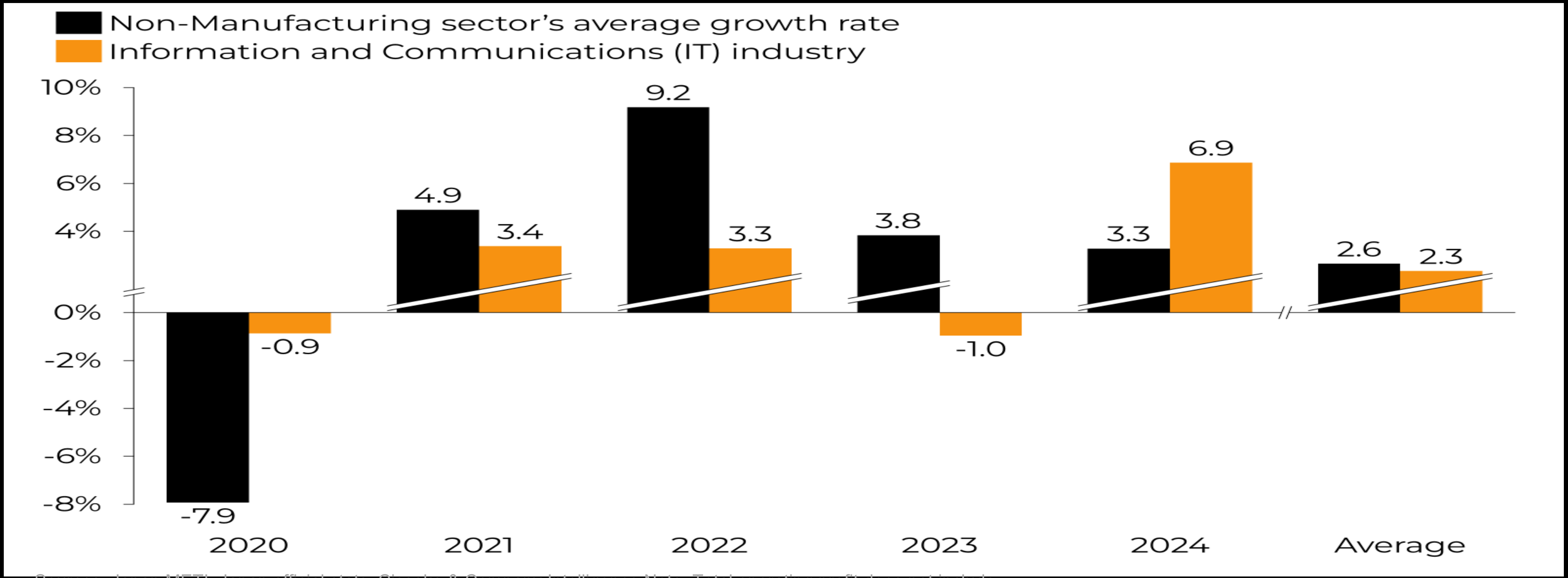
Who’s who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s Transport and Postal Services Industry

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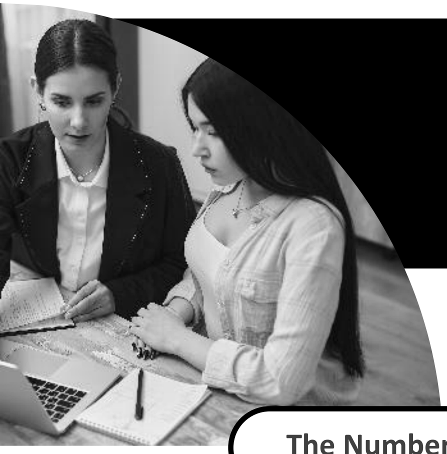
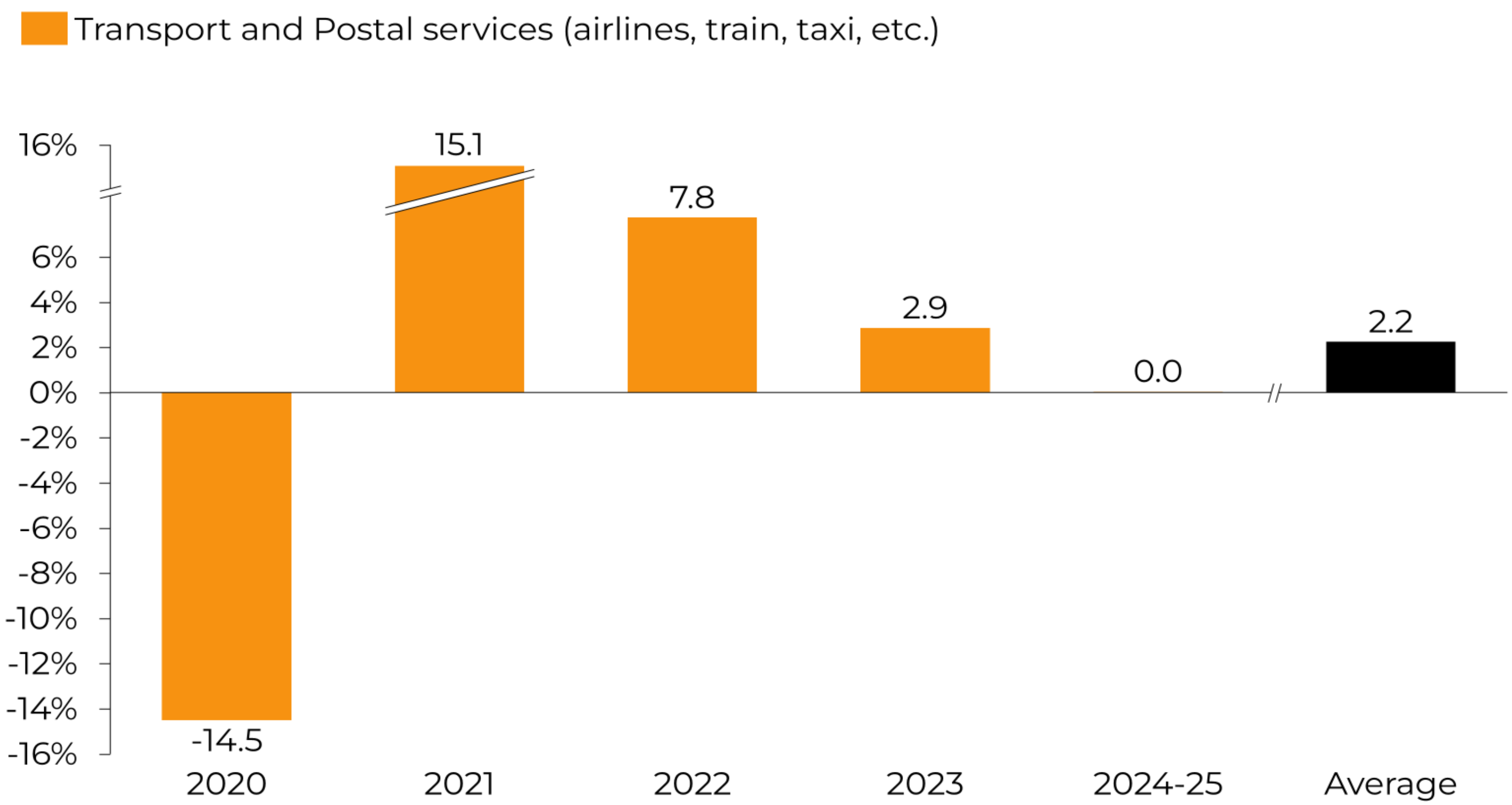
Japan's transport and postal services industry did not grow at all in the FY2024-25, but grew on average at 2.2% over the past 5 years.



The Number Game

Who's who?



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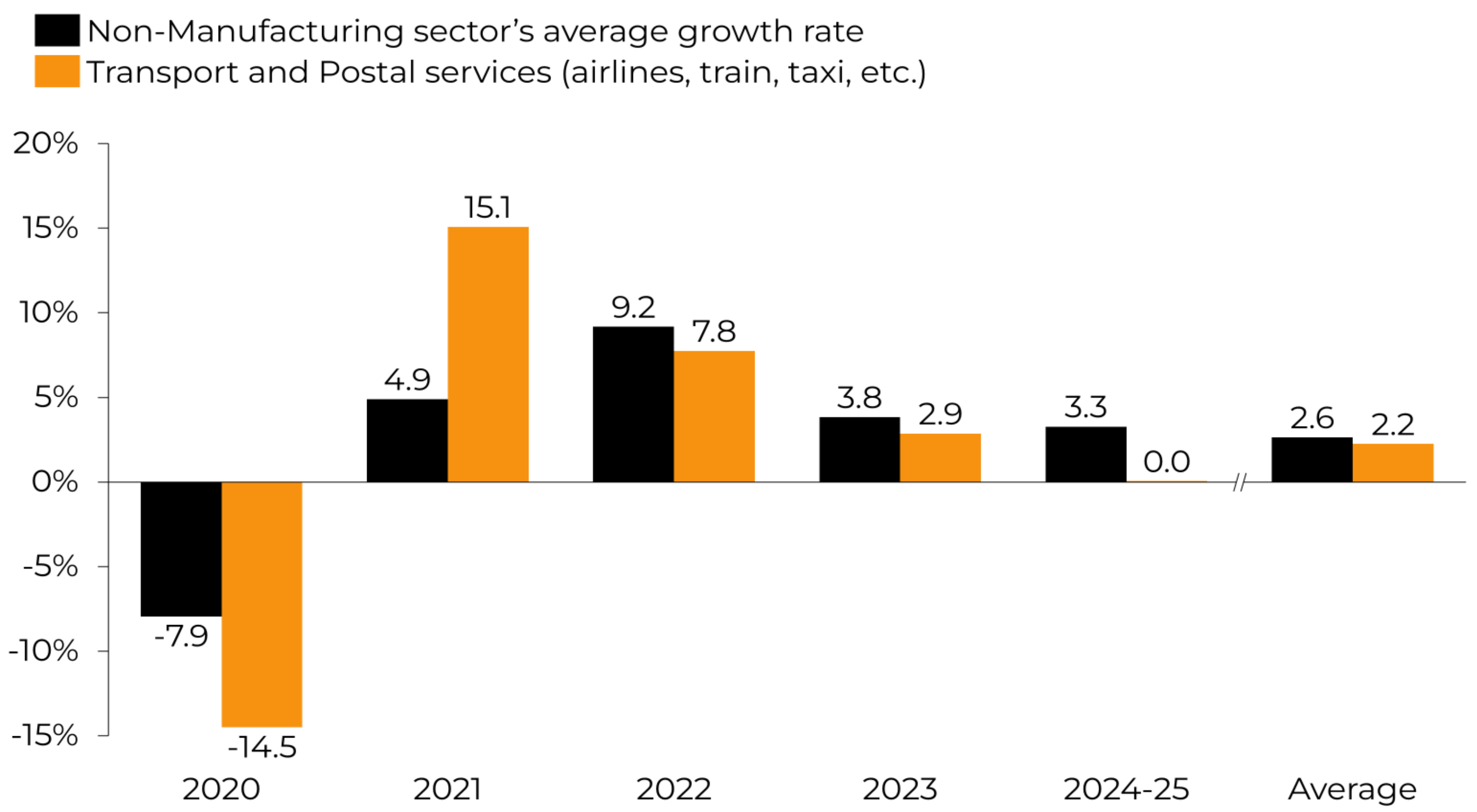
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Compared to the non-manufacturing sector, the transport and postal services industry performed poorly in FY 2024-25, but had almost equal growth over 5 years.

Trend Analysis

Who's who?



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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Production, Transmission, and Distribution of Electricity

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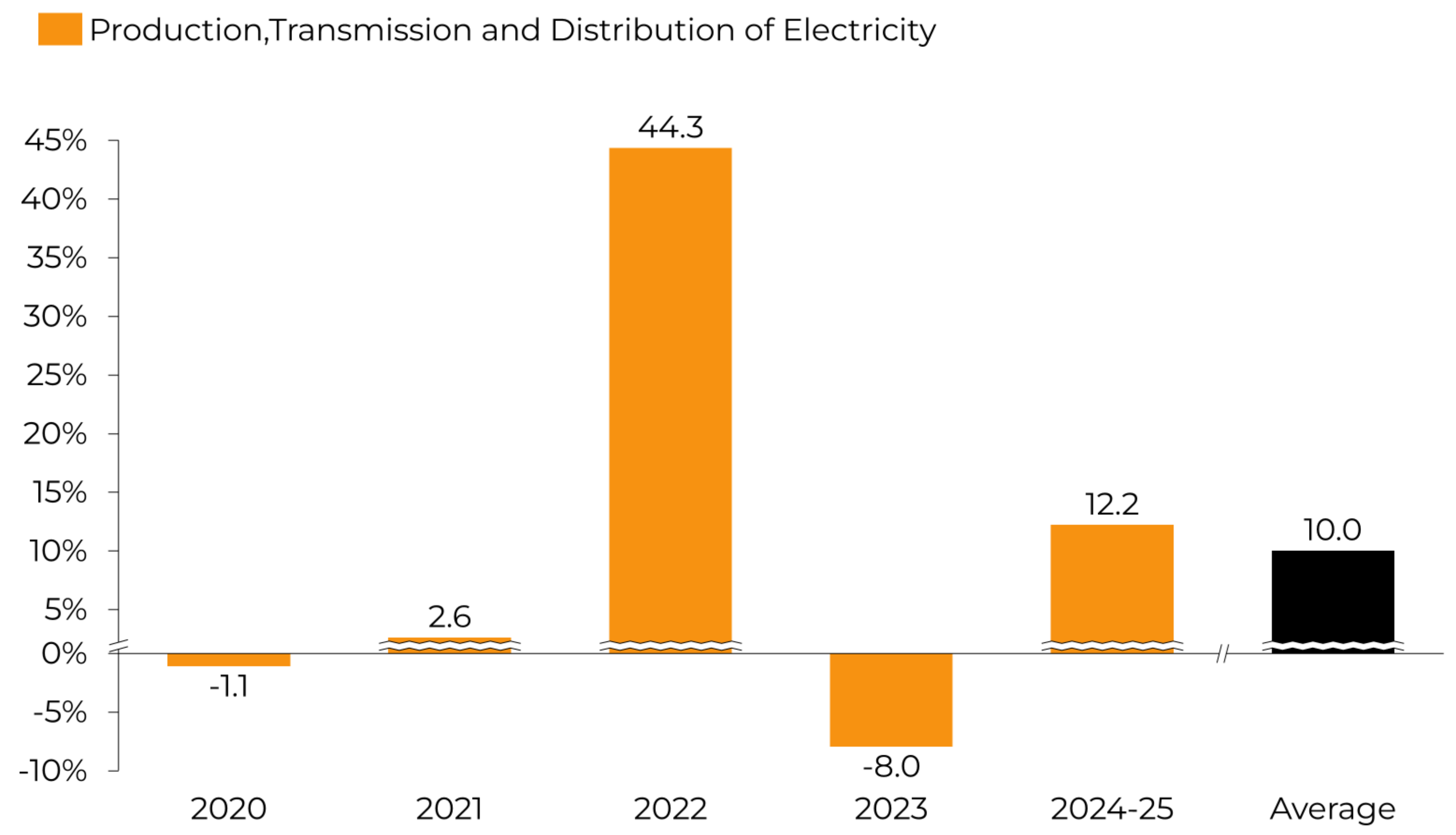
Japan's electricity industry was Japan's Growth Gold Medalist 2025™, and on average, grew at a double-digit growth rate over the past 5 years.

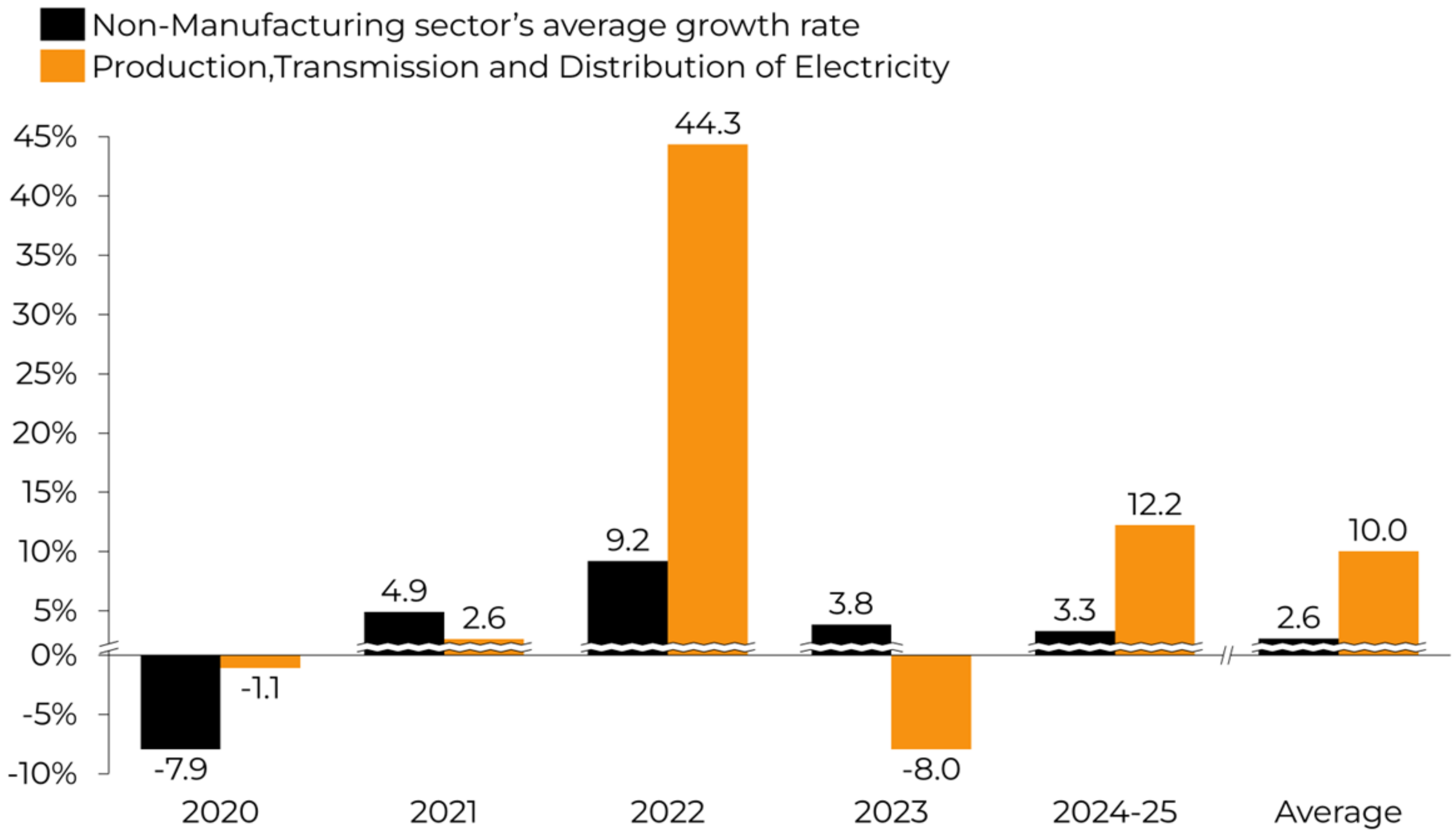
Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan's electricity industry grew at 3.6 times the growth rate of the non-manufacturing sector in FY2024-25, and on average, 3.8 times over 5 years.

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s Services Industry

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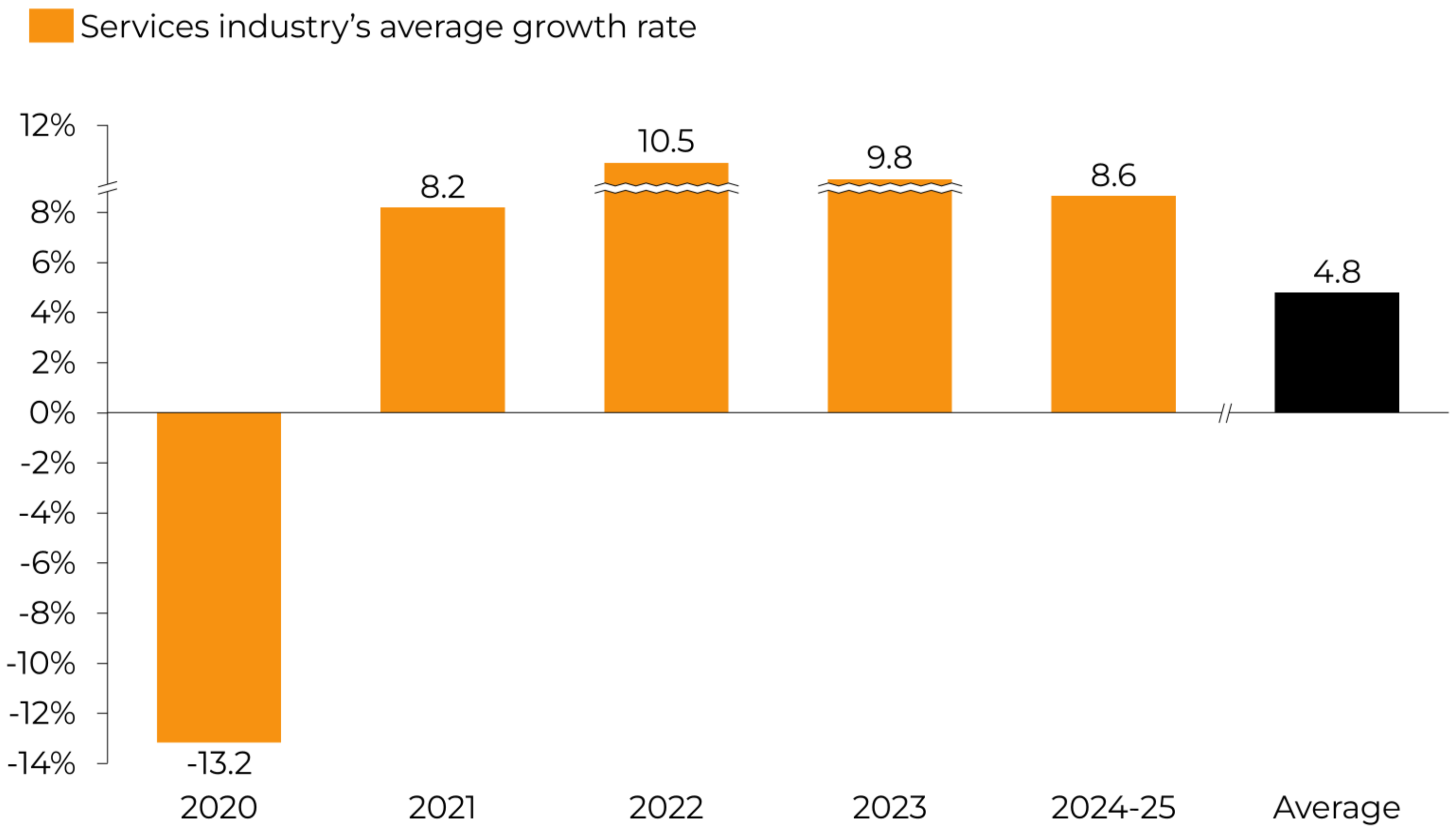
Japan's services industry is among the top growth performers in the FY2024-25 (8.6%), which was better than its 5-year growth average.

State of Growth in the Japanese Market



Who's who?

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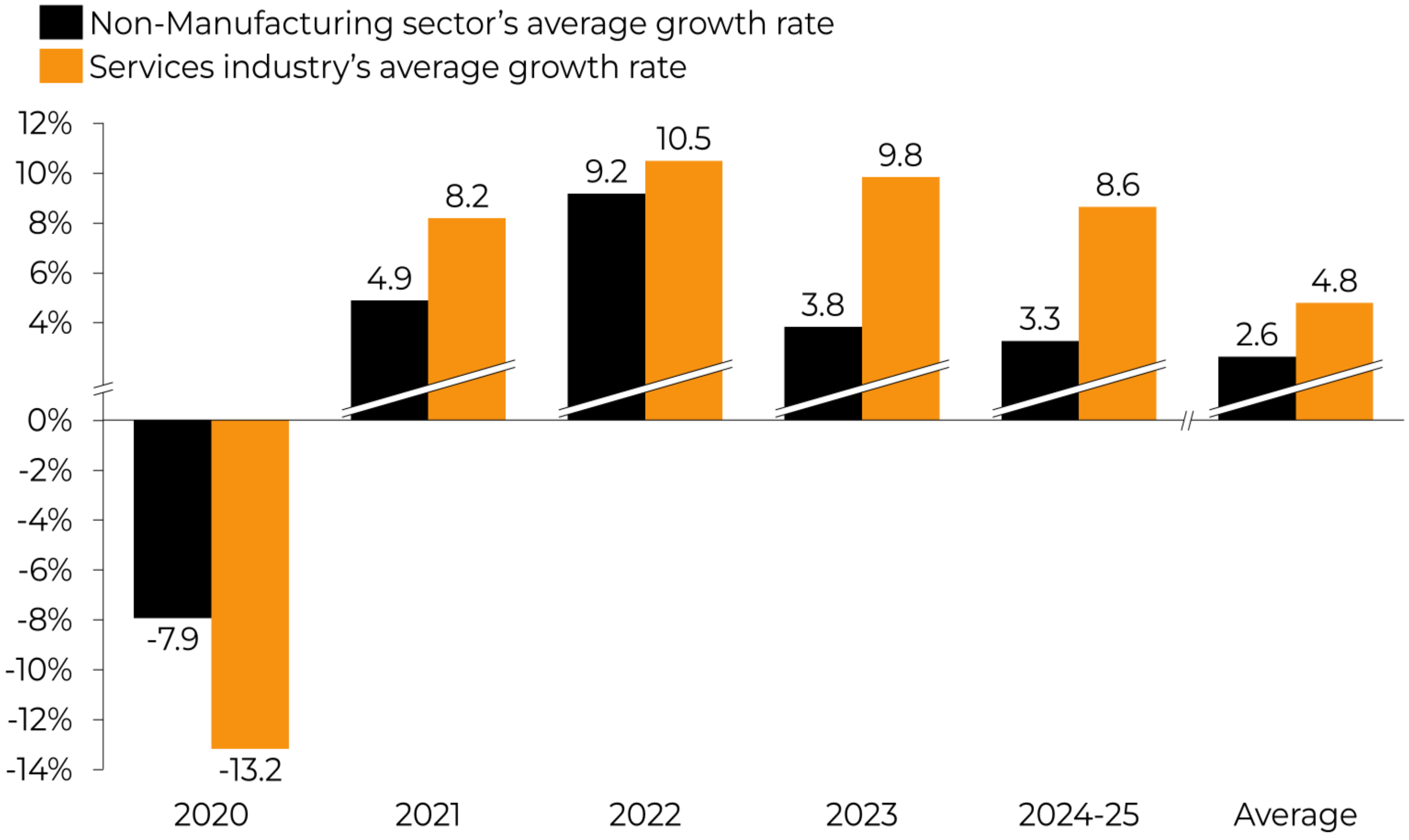
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Indeed, the services industry grew faster than the non-manufacturing sector in the FY2024-25, and on overage, beat it over the past 5 years.

State of Growth in the Japanese Market



Who's who?

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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Who’s who in Japan’s $11.3 Trillion market?

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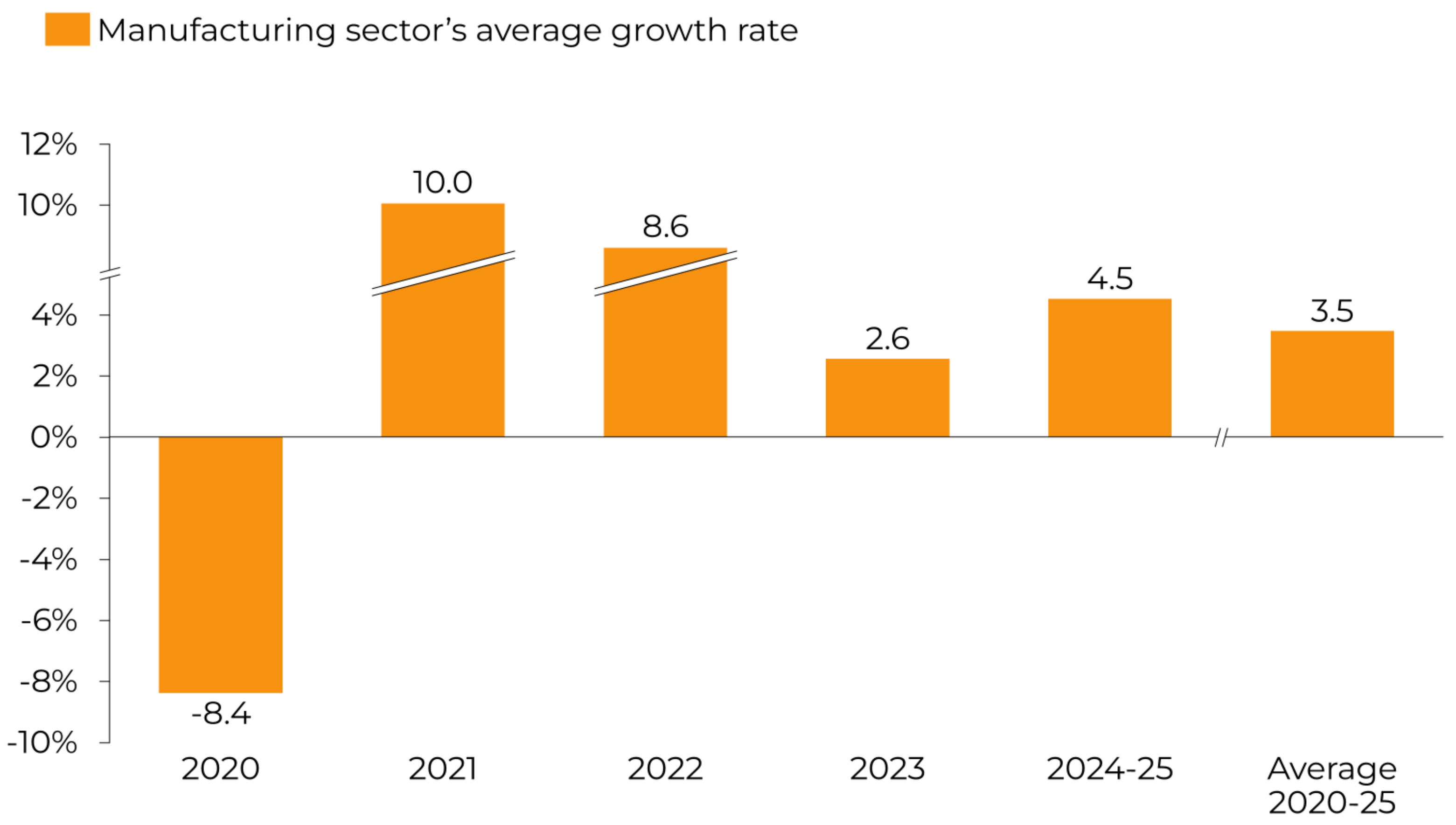
Japan's manufacturing sector grew at 4.5% in the FY2024-25, which was better than the non-manufacturing sector and its 5-year growth average.

The growth landscape in Japan's ¥1,700 trillion market in the age of artificial intelligence – Who's who?

Who's who?



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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Compared to Japan's growth rates, the manufacturing Sector grew faster in the FY2024-25, and on average, the sector beat Japan's average growth over 5 years.

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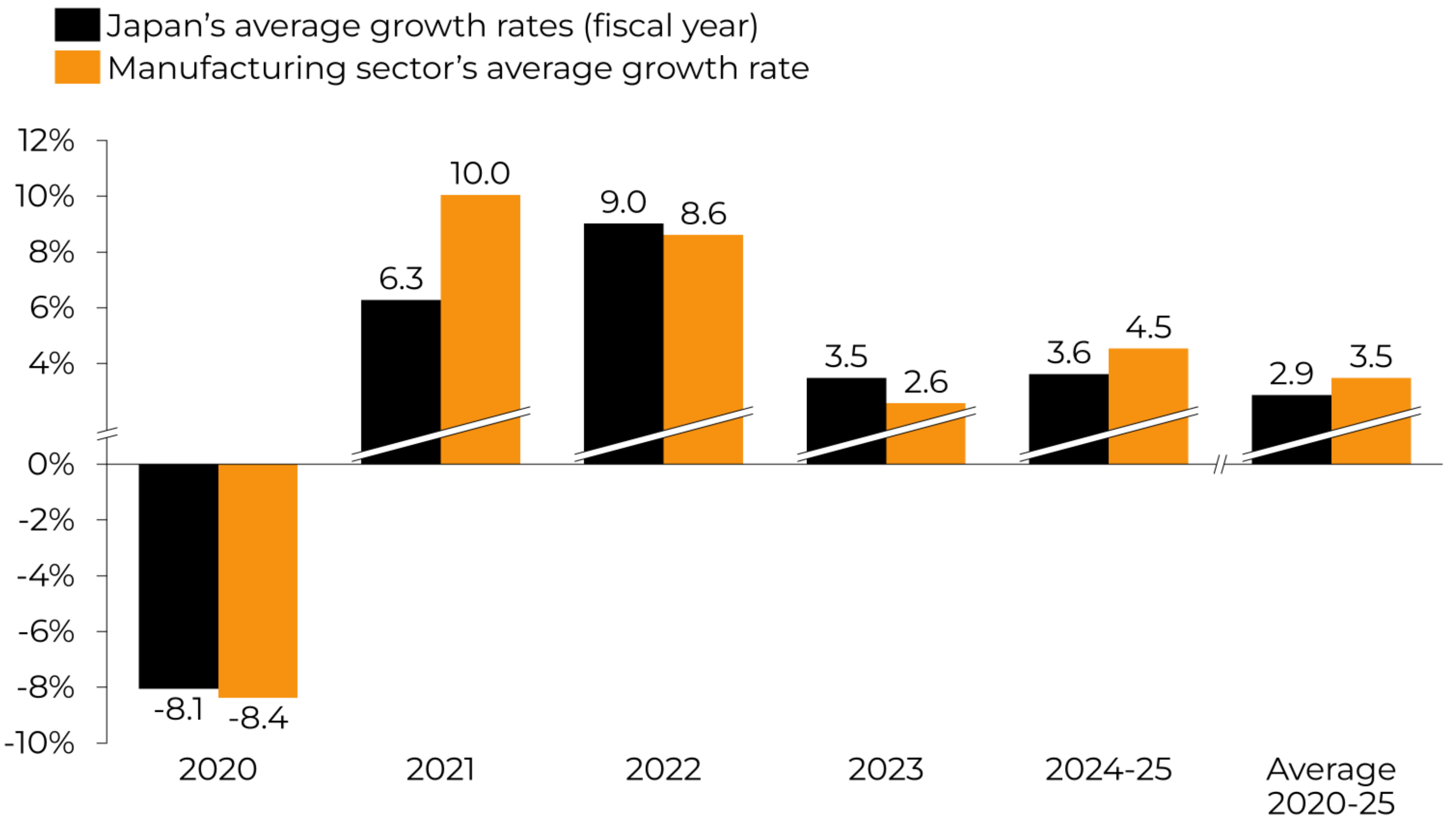

Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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Japan’s Food Industry

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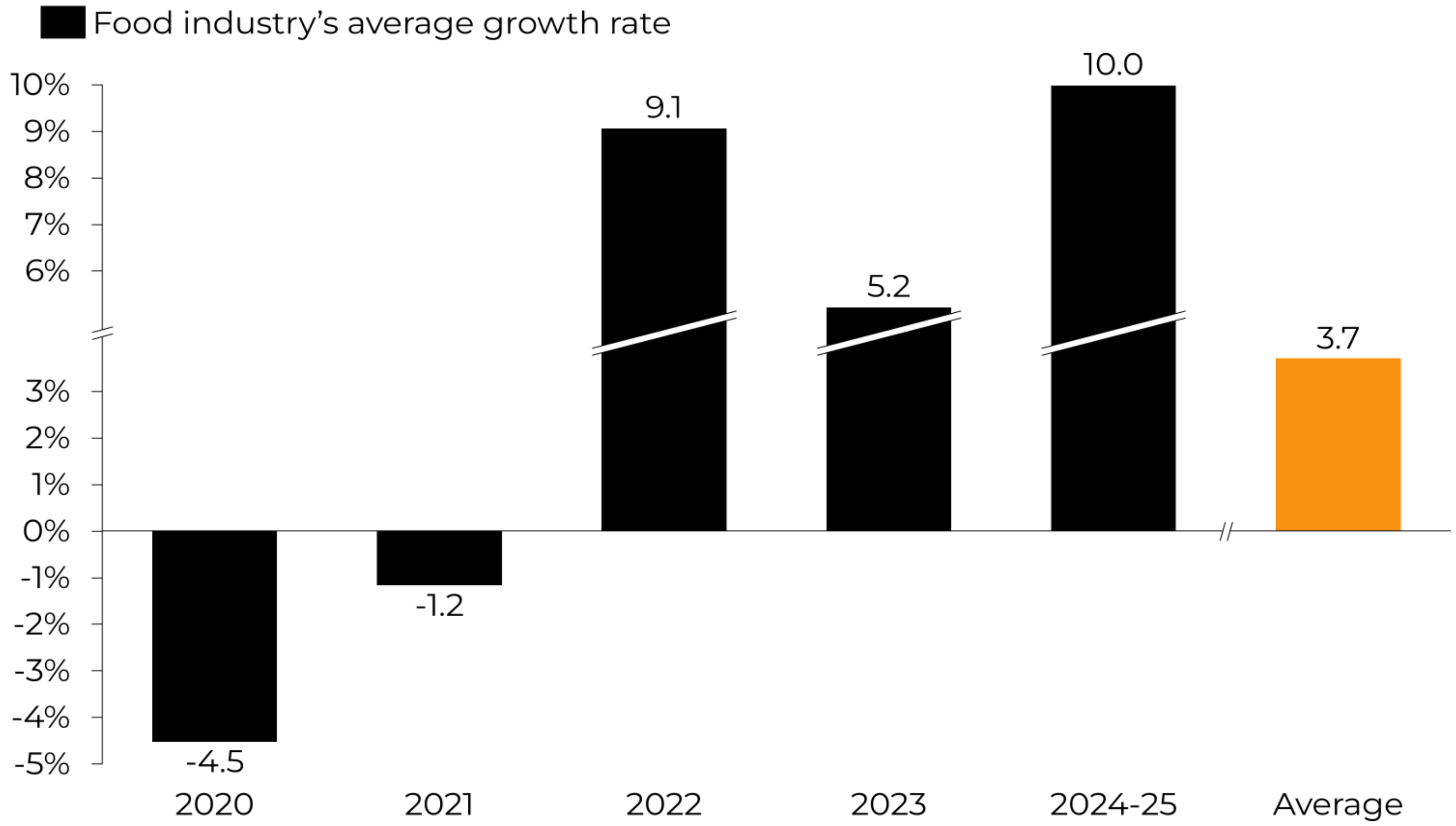
Japan's food industry grew at 10% in the FY2024-25, which was far better than its average growth rate over the past 5 years.

Who's who?



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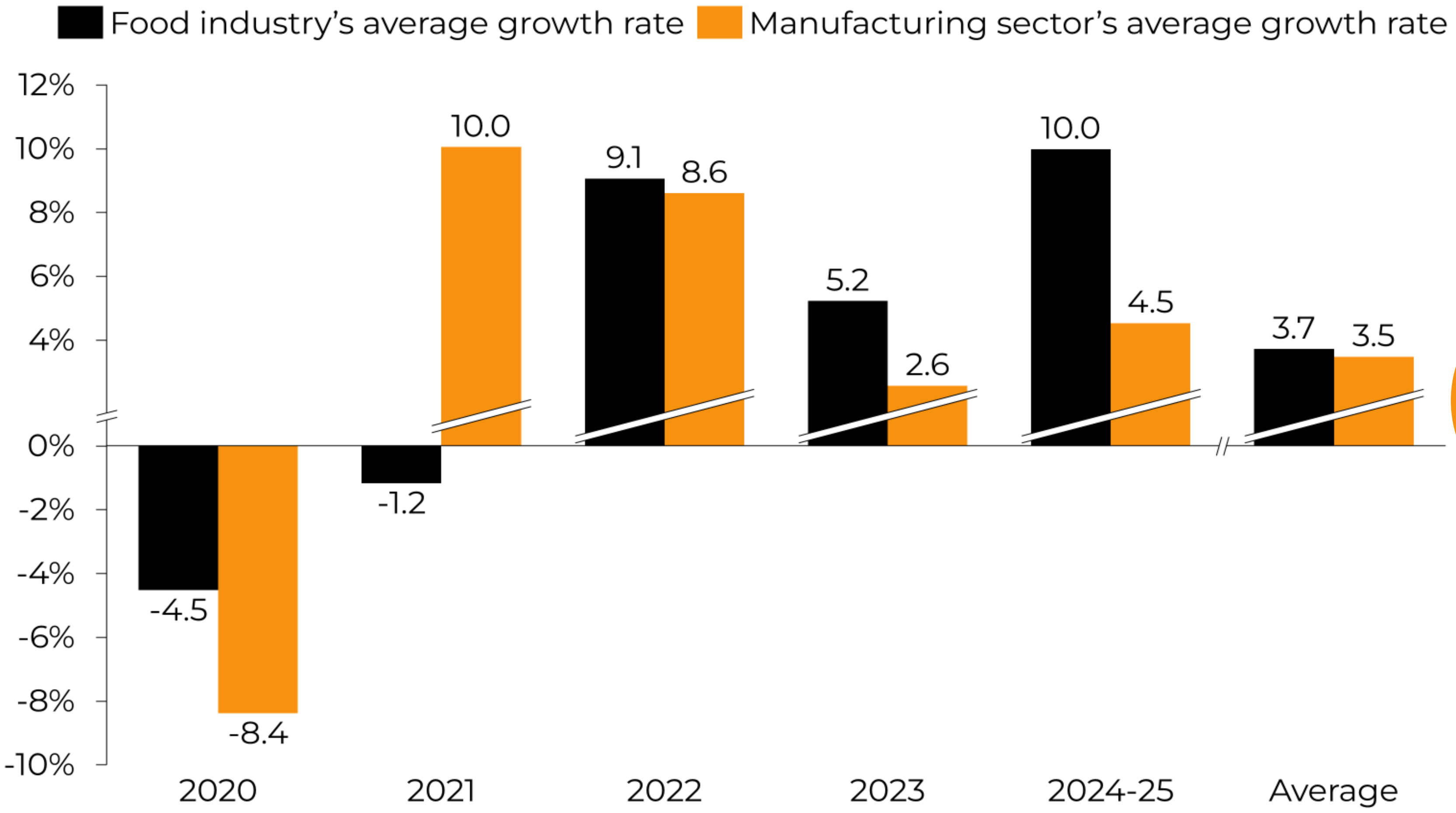
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Compared to Japan’s manufacturing sector, the food industry grew faster in FY2024-25, and on average, the industry grew in lockstep with its sector (manufacturing).

Who’s who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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Japan's Chemicals and Allied Products Industry (Pharma)

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Growth and Comparative Analysis

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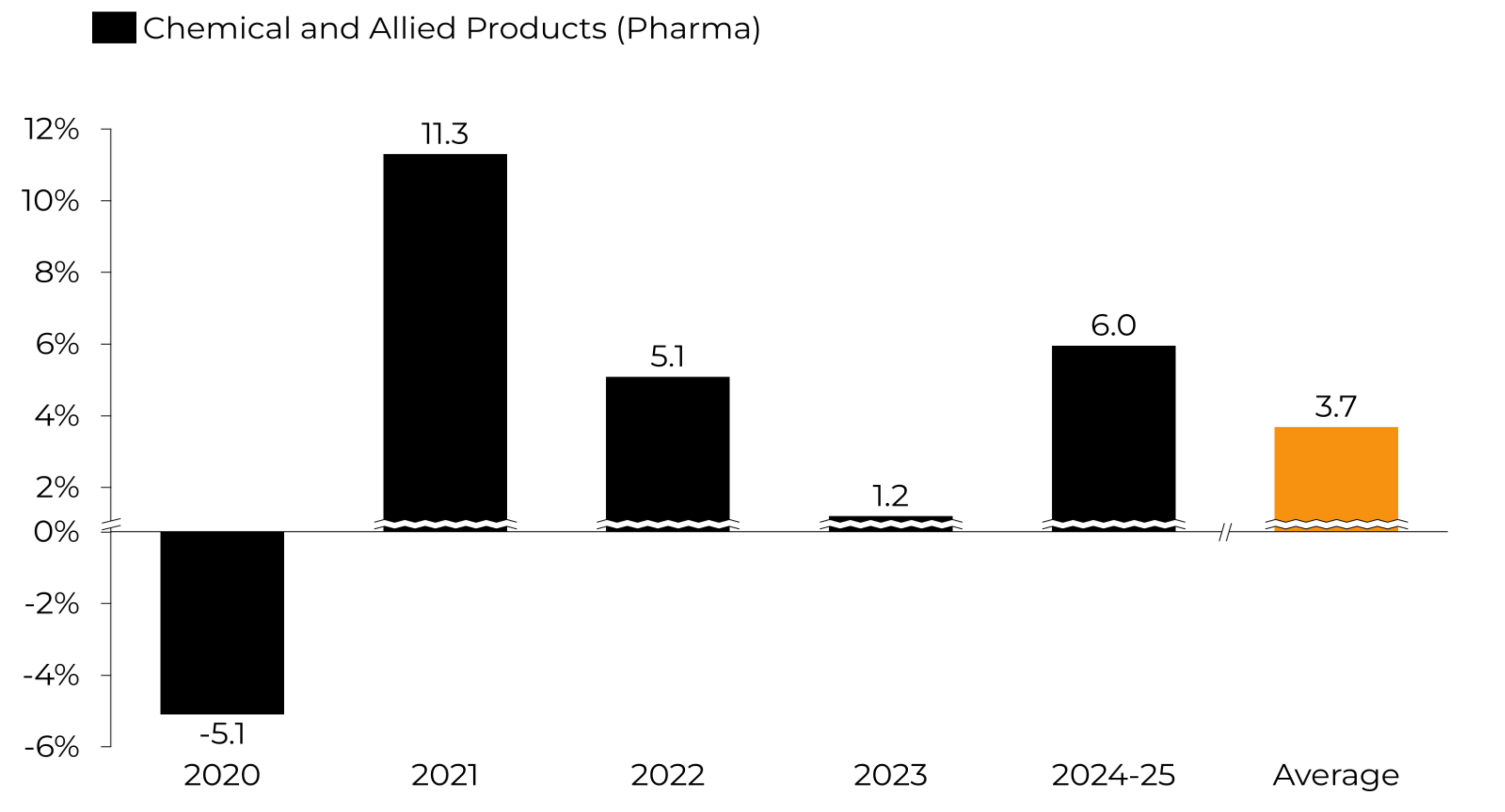
The chemical and allied products industry grew at 6% in FY2024-25, Which can be considered better than its 5-year growth rate (3.7%).

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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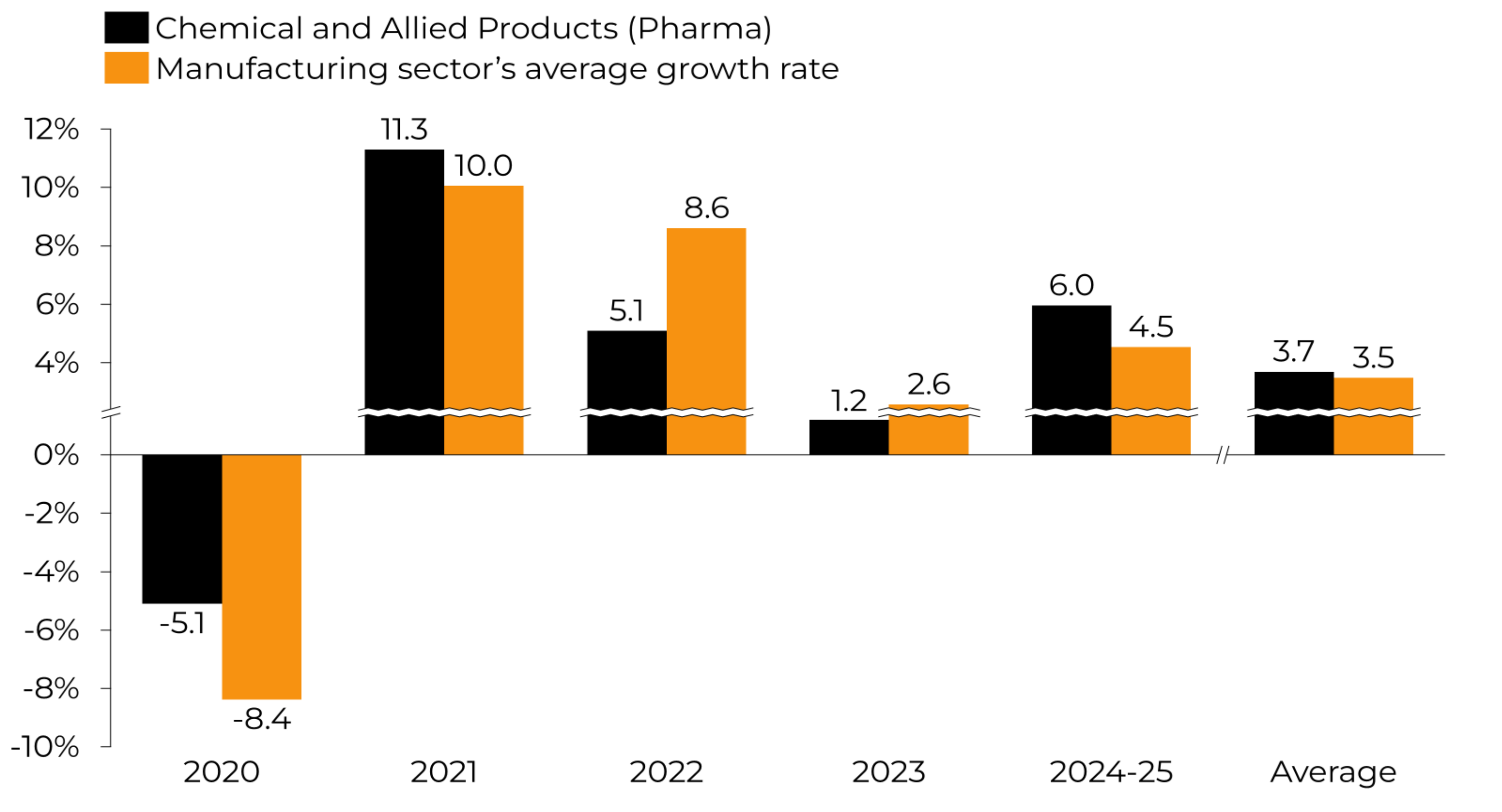
While the chemical and allied products industry beat the Manufacturing sector in FY2024-25, on average, their growth rates were almost the same over the past 5 years.

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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Japan’s Petroleum and Coal Industry

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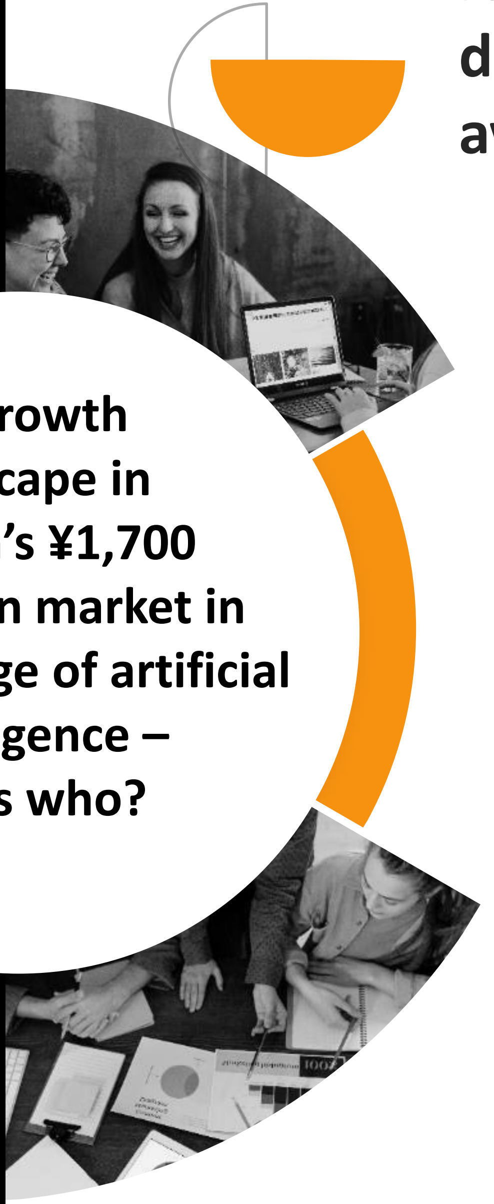
Japan's petroleum and coal industry has been badly disrupted over the past 2 fiscal years (negative growth). However, on average, it grew at 6% over the past 5 years.



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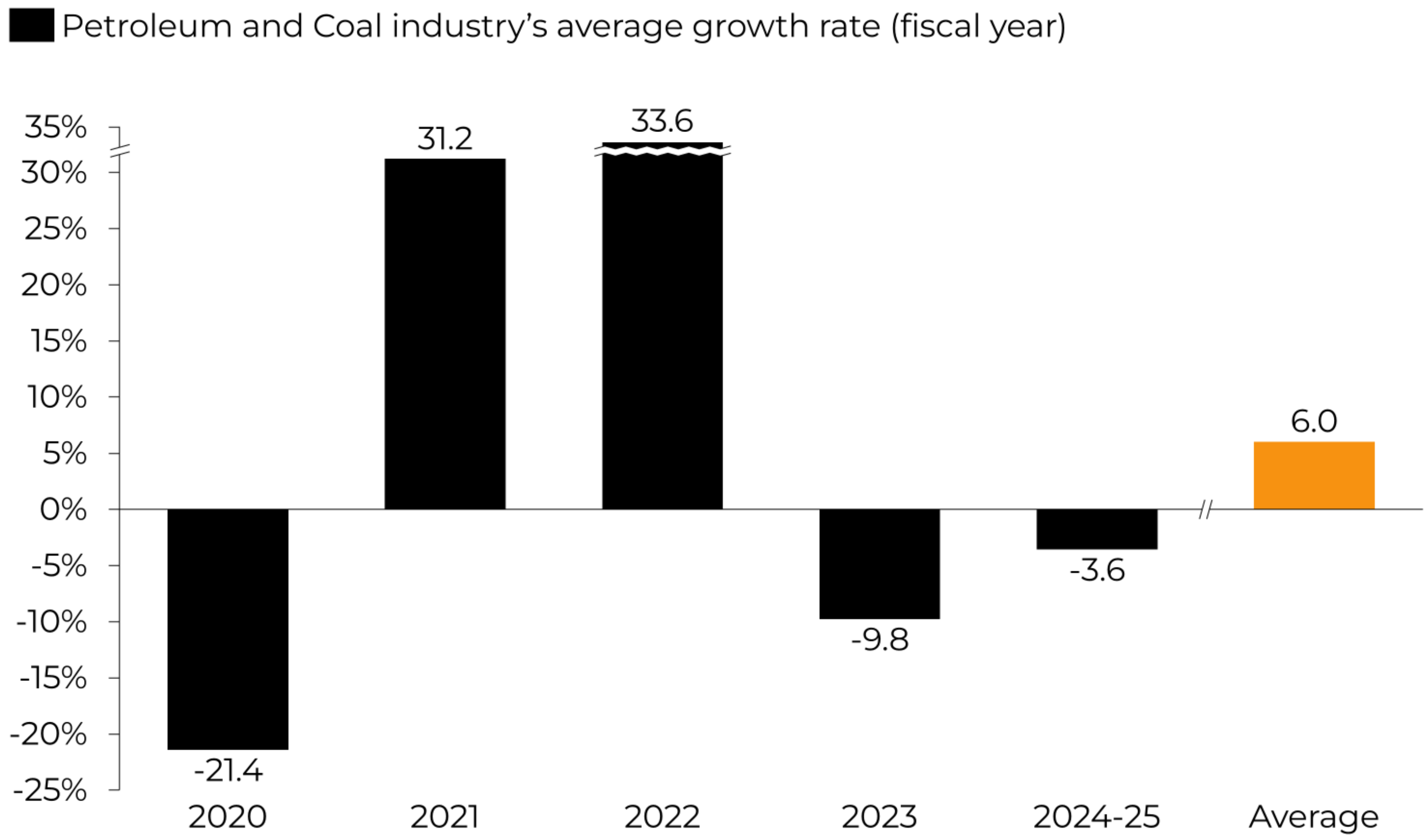

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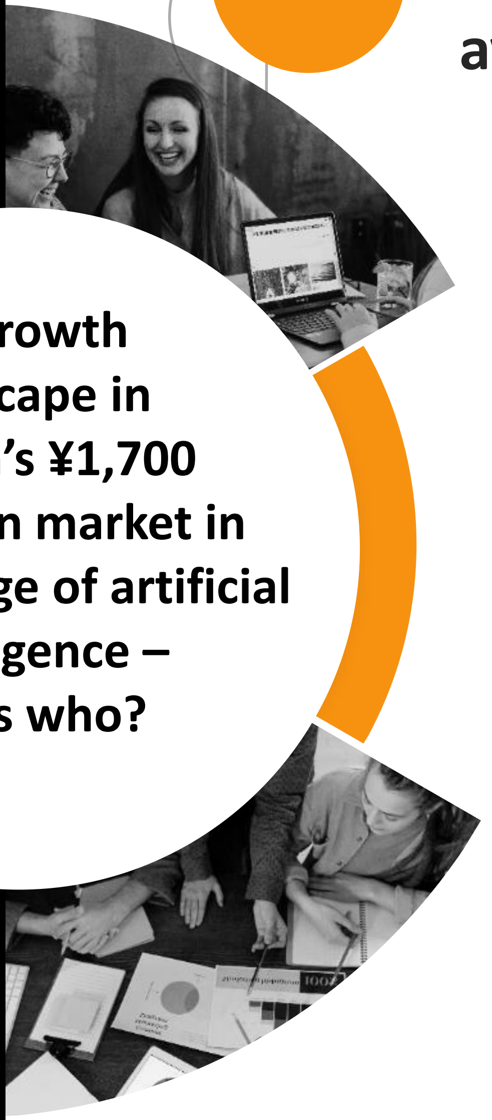
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry



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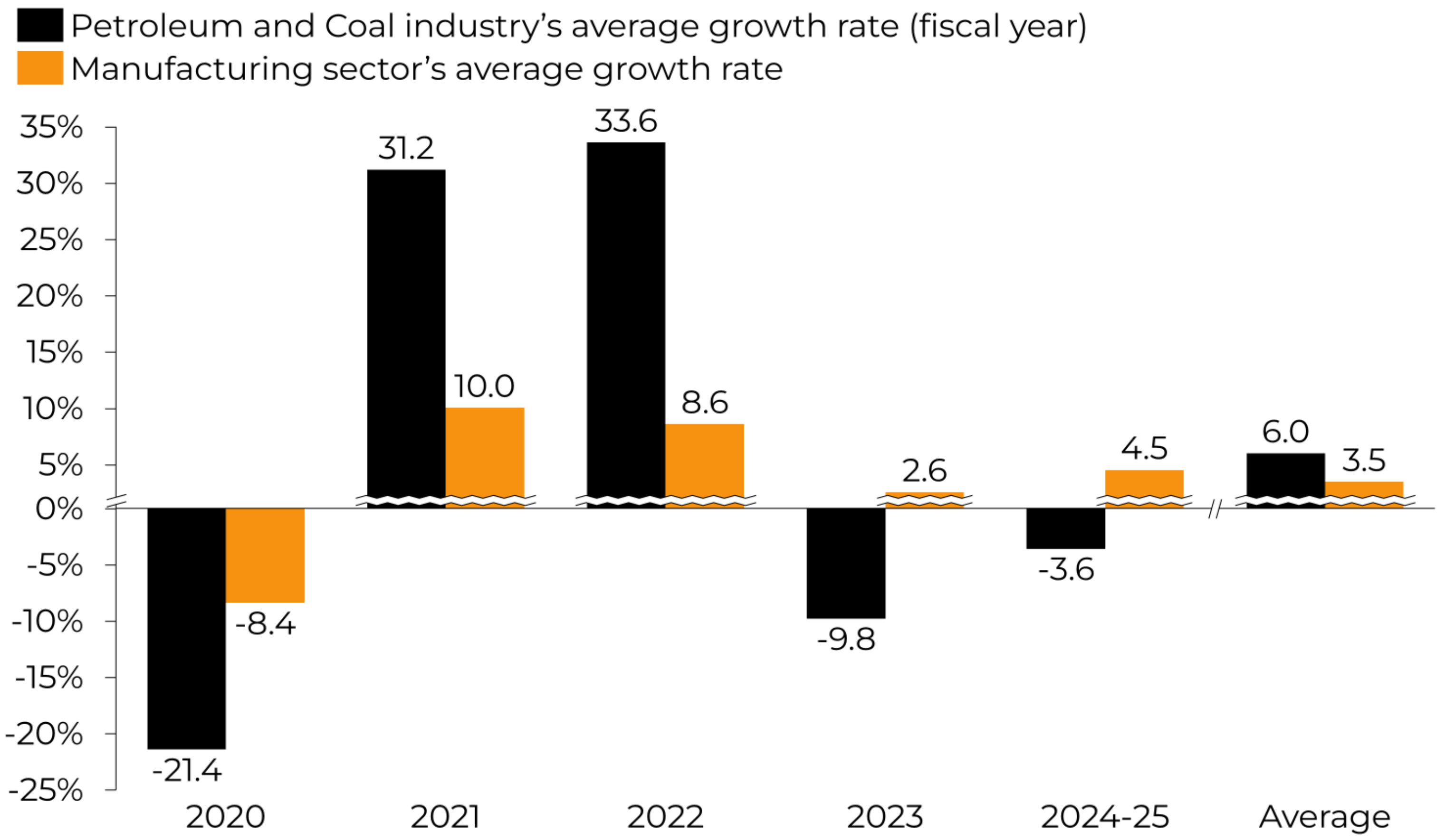
he age of artificial
ntelligence –
Who's who?

Who's who?

Compared to the manufacturing sector's growth, the petrol and coal industry did poorly in the FY2024-25, but over the past 5 years, on average, it beat its sector.



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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s Iron and Steel Industry

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Growth and Comparative Analysis

- Industry’s growth trends
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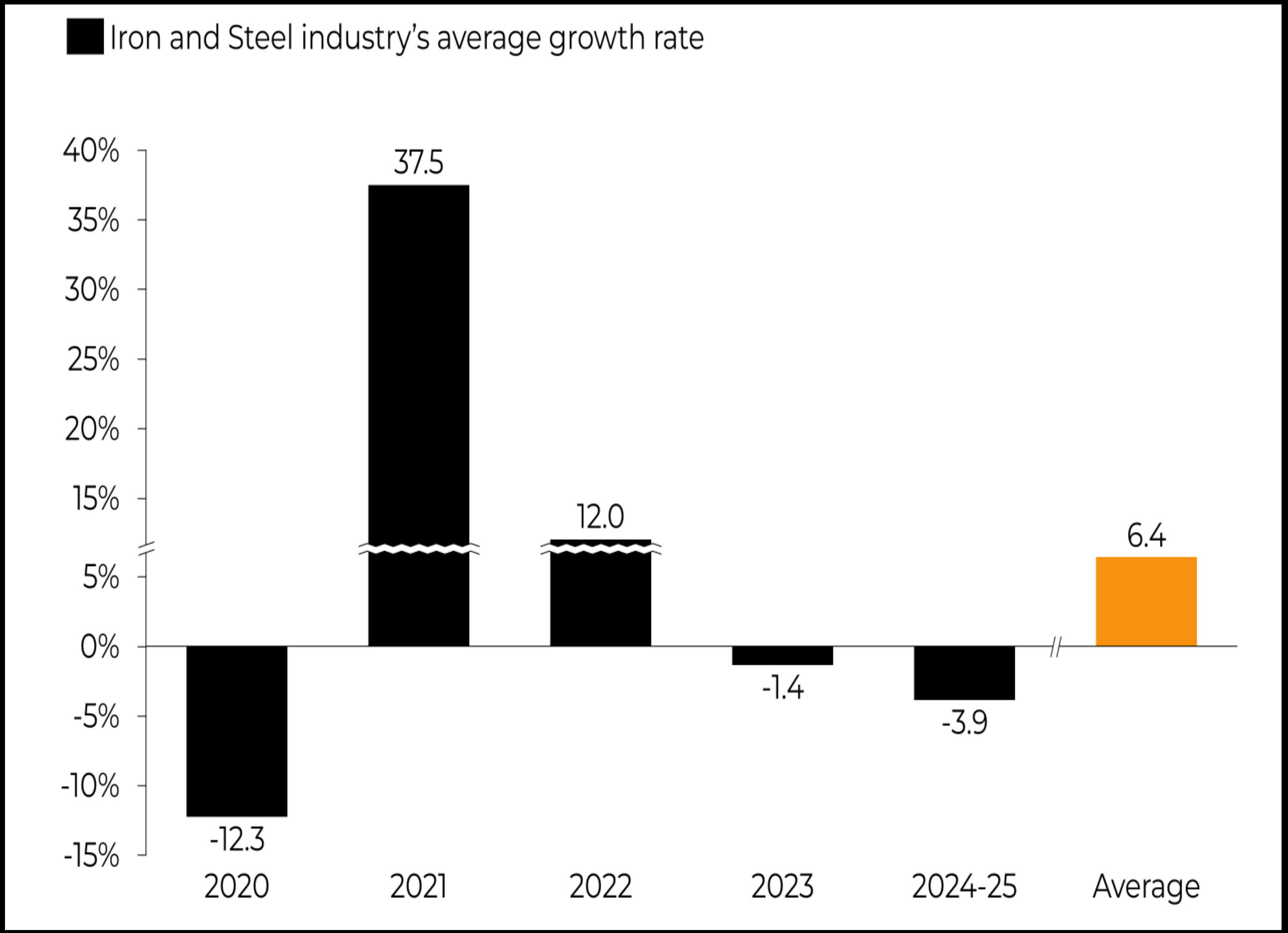
Japan's Iron and Steel industry performed poorly in the two preceding fiscal years. However, on average, it grew at 6.4% over the past 5 years.

Who's who?



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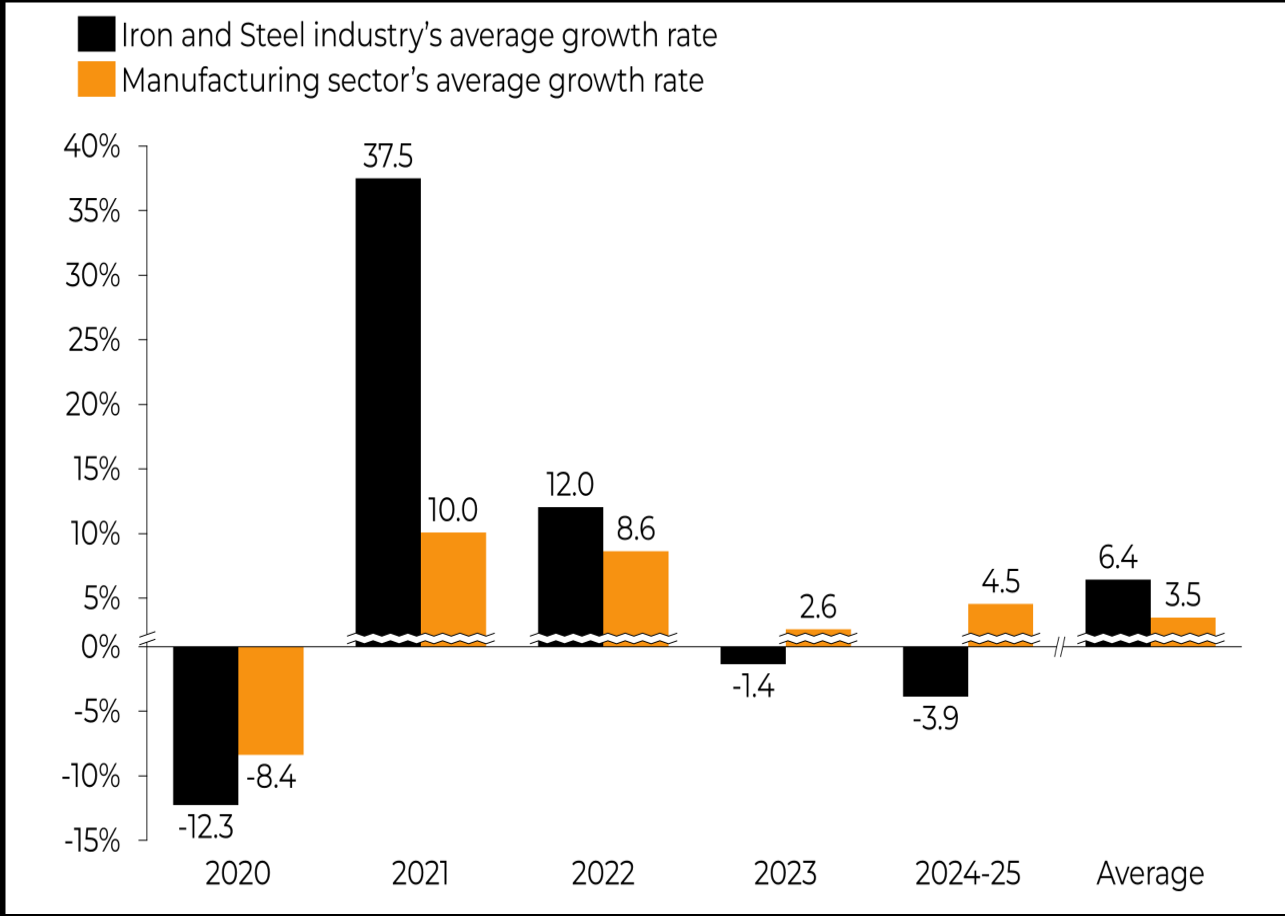
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Compared to the manufacturing sector's growth, the Iron and Steel industry did poorly in FY2024-25, but did better on average over the past 5 years than manufacturing

Who's who?



CISSOKO & COMPANY

Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include finance & insurance industry

Japan’s Fabricated Metal Products Industry

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Growth and Comparative Analysis

- Industry’s growth trends
  - How does it compare to the average Japanese industry?

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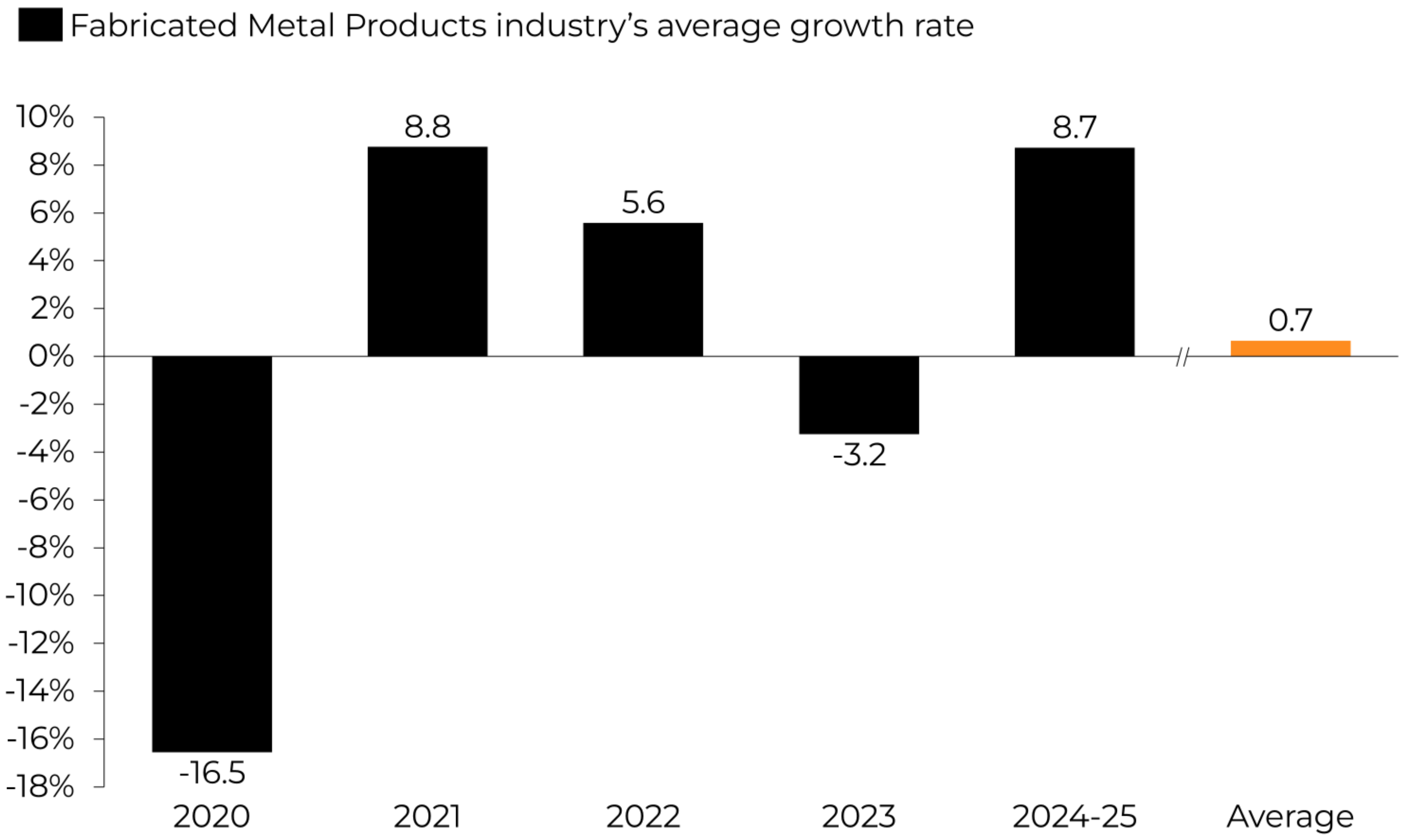
CISSOKO & COMPANY

The fabricated metal products industry is among the top growth performers (8.7%) in the FY2024-25, which was far outstanding than its 5-year average growth rate (0.7%).

Who's who?



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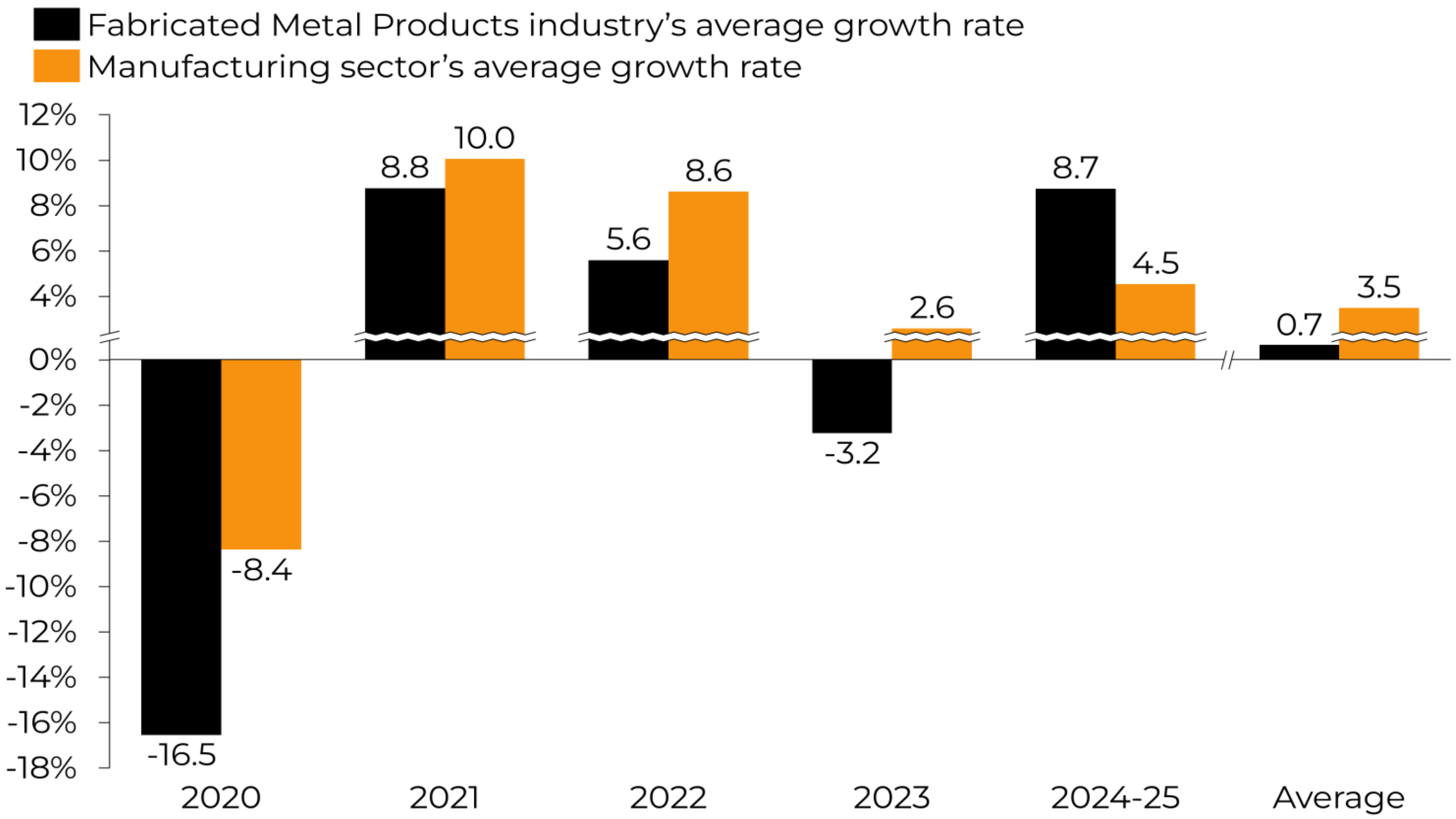
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Although the fabricated metal products industry grew faster than the manufacturing industry, its average 5-year growth performance was far below its sector (Mfg).

Who's who?



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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s General-Purpose Machinery Industry

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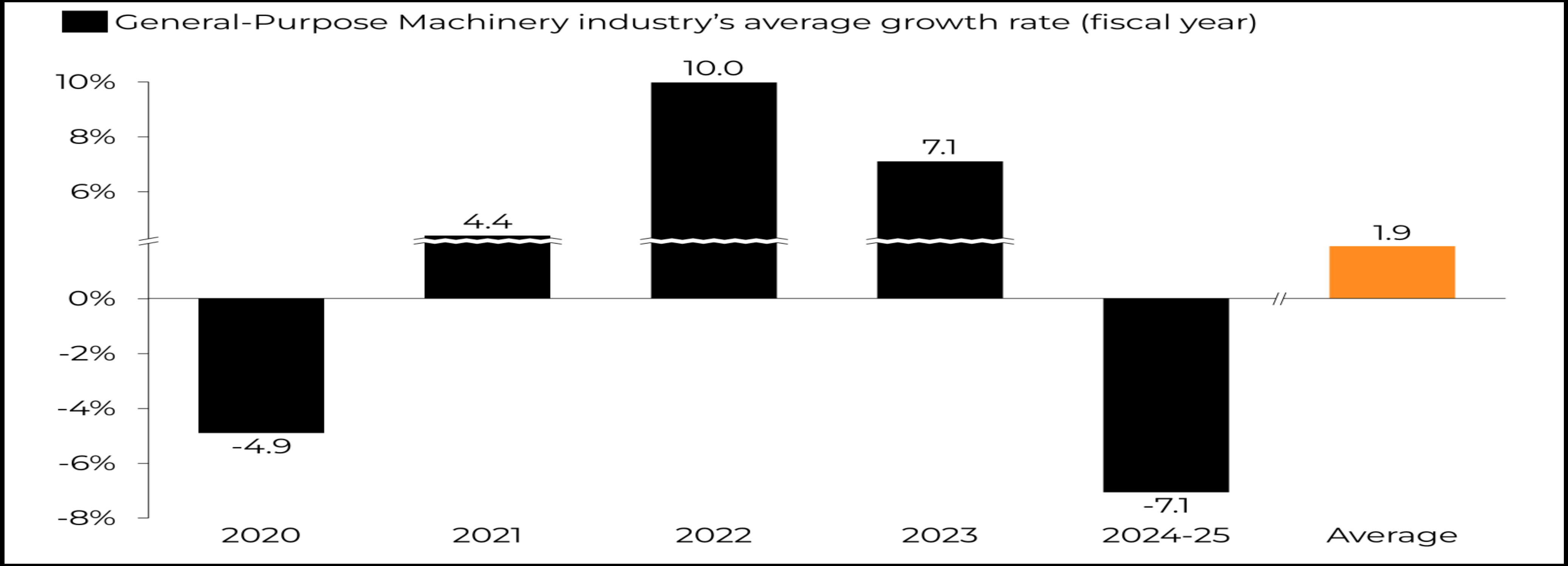
CISSOKO & COMPANY

The general-purpose machinery industry's was terribly disrupted in the FY2024-25 (-7.1%). But, its 5-year average growth was nearly (2%).

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

The industry's growth performance hasn't kept pace with its sector (manufacturing) in both FY2024-25, and on average, over 5 years.

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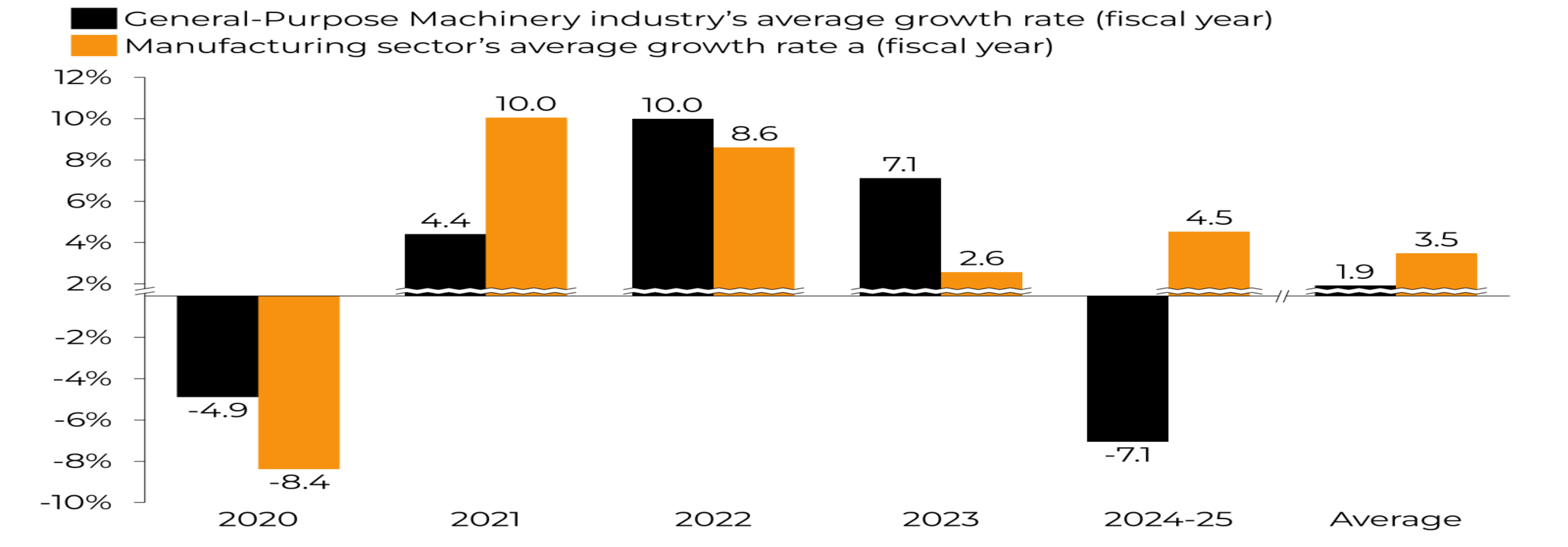
Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include finance & insurance industry

Japan’s Production Machinery Industry

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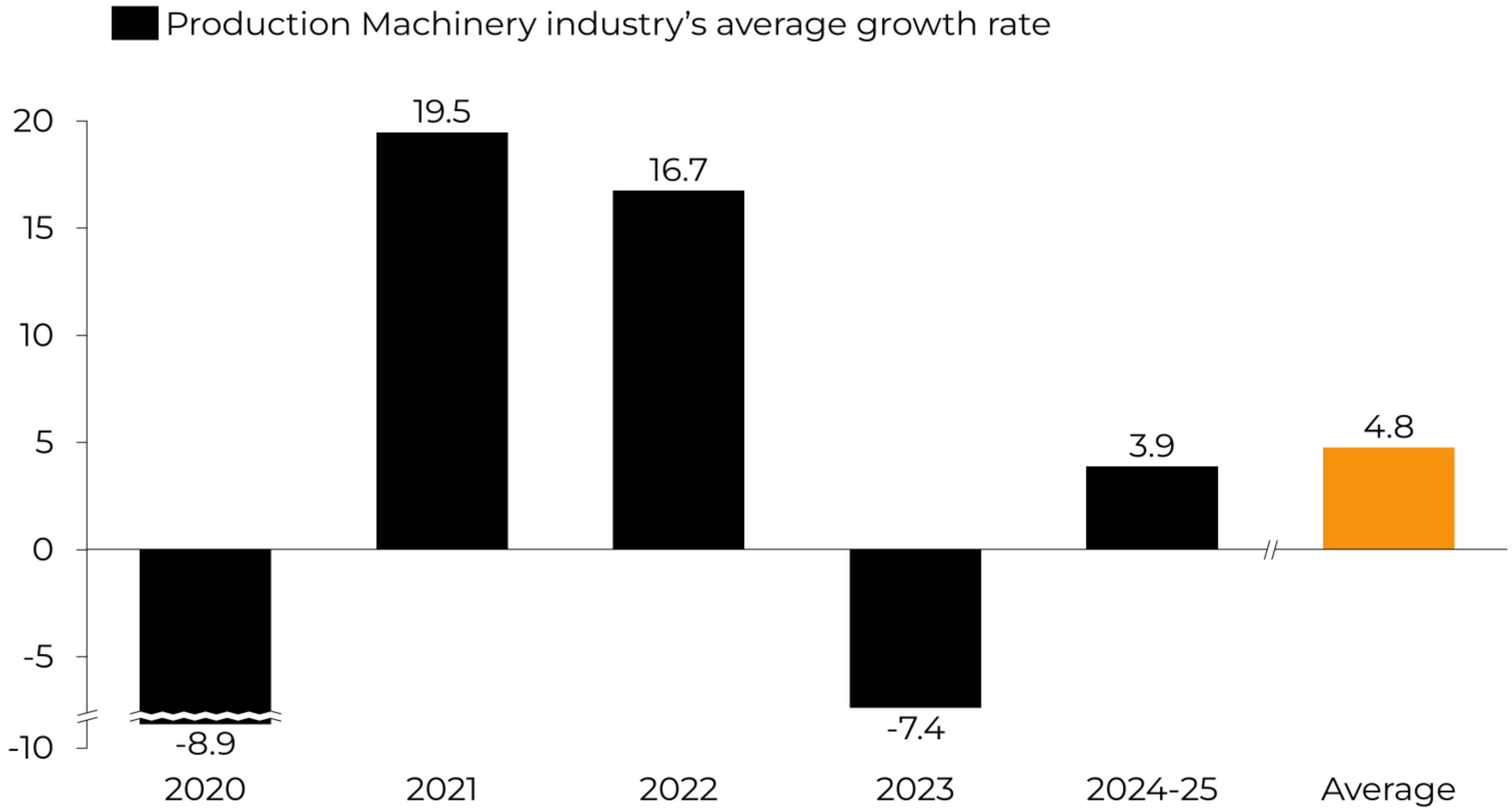
CISSOKO & COMPANY

The production machinery industry grew at 3.9% (better than Japan's average) in FY2024-25, and on average has been growing at 4.8% over the past 5 years.

Who's who?



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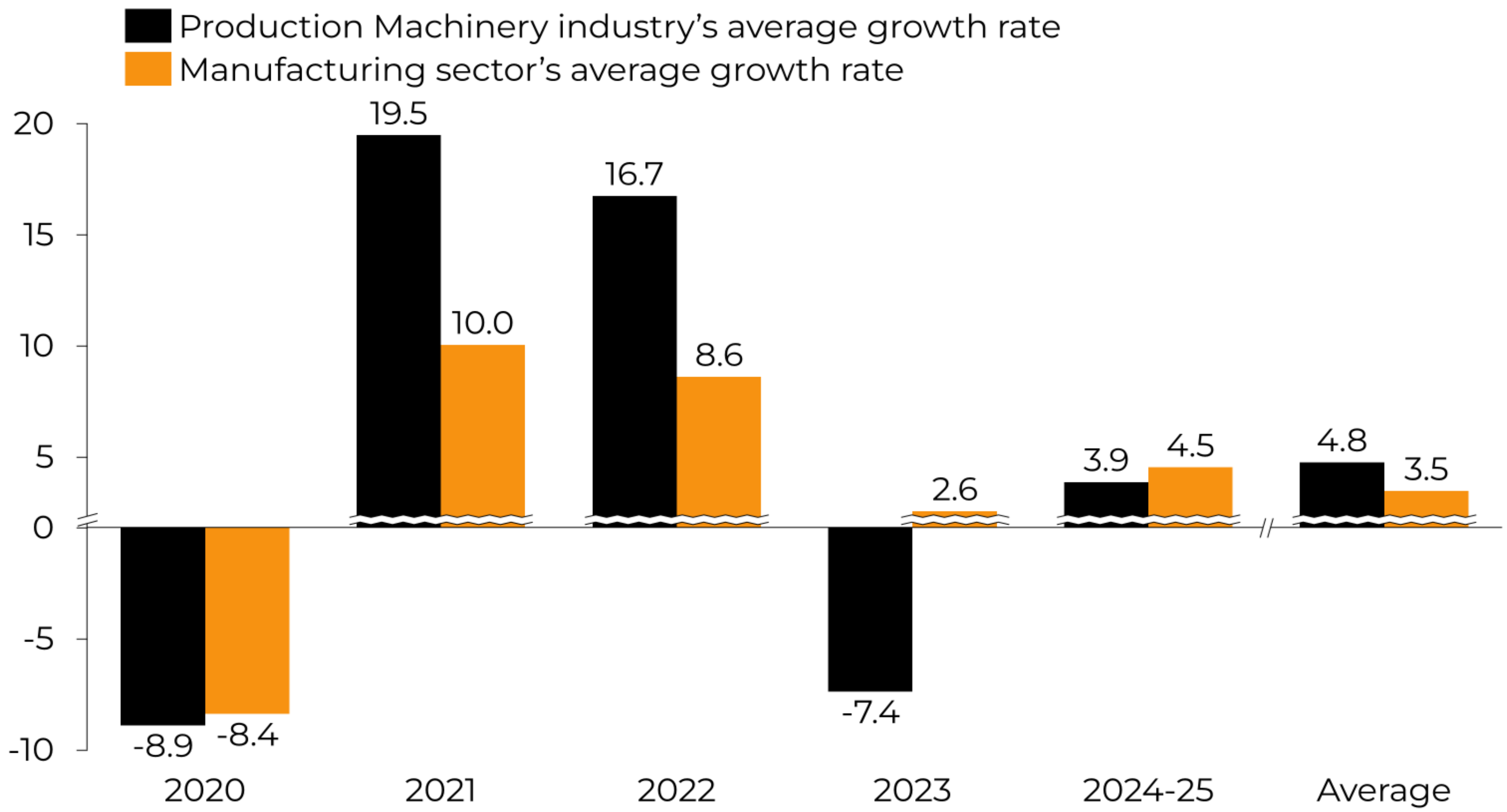
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Although the industry's growth rate lagged behind the manufacturing sector in the FY2024-25, its 5-year average growth rate beat the sector's overall growth rate.

Who's who?



CISSOKO & COMPANY

Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s Business-Oriented Machinery Industry

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Growth and Comparative Analysis

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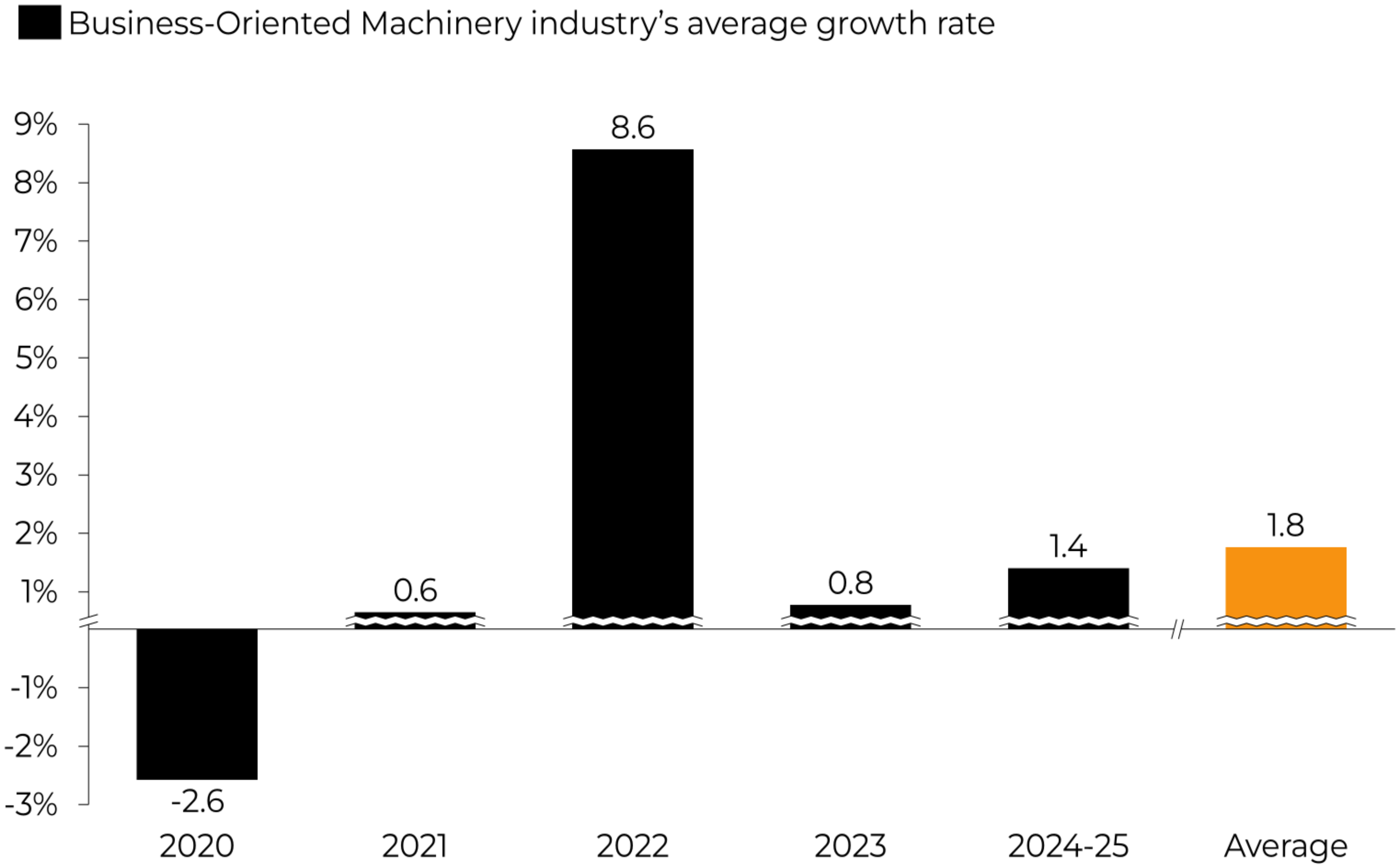
The business-oriented machinery industry’s growth performance in the FY2024-25 (1.4%) was below its average 5-year growth rate (1.8%).

State of Growth in the Japanese Market



Who’s who?

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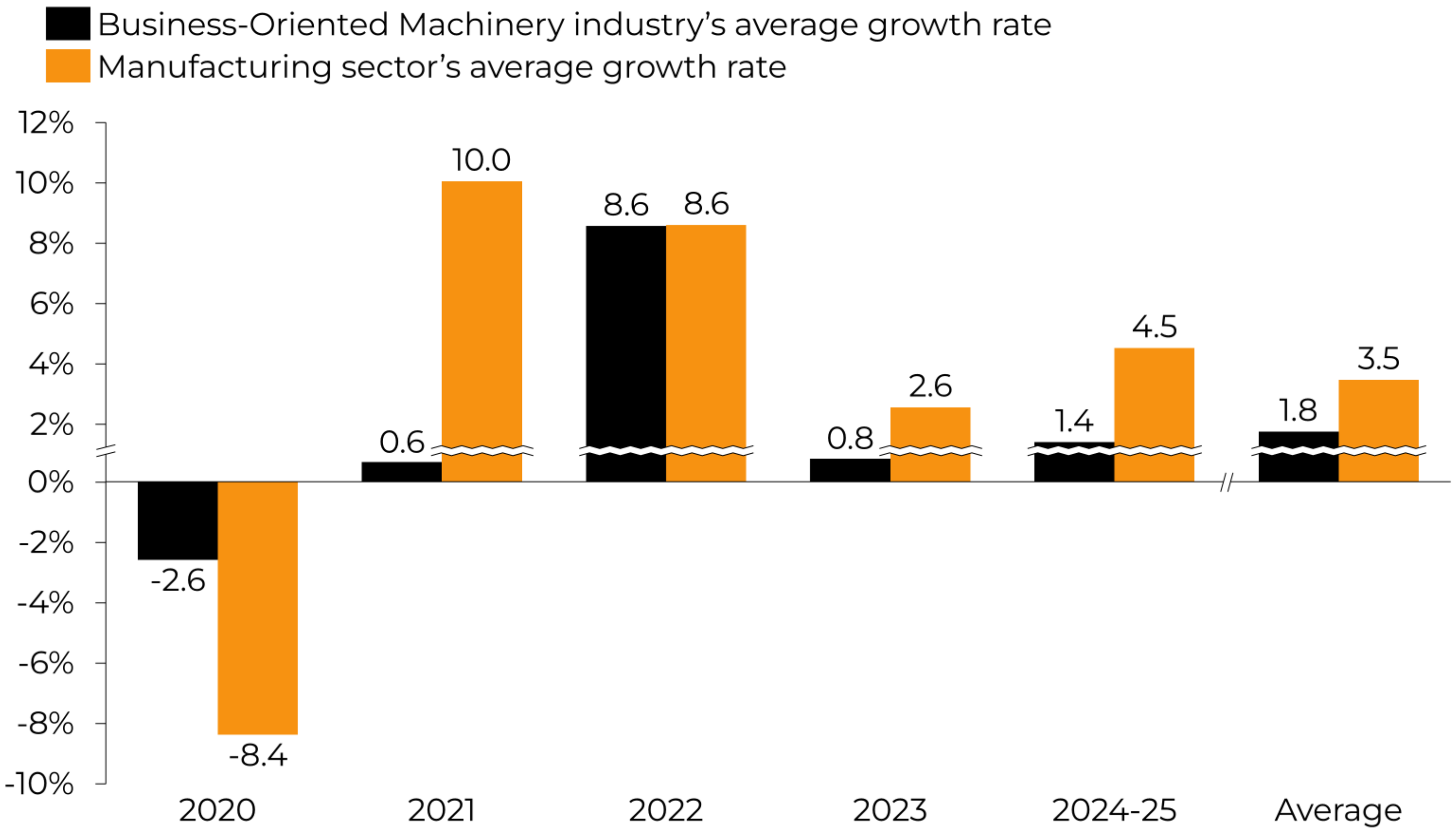
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Again, the industry growth performance lagged far behind both the manufacturing sector in the FY2024-25 and on average over 5 years.

State of Growth in the Japanese Market



Who's who?

CISSOKO & COMPANY

Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s Electrical Machinery and Supplies Industry

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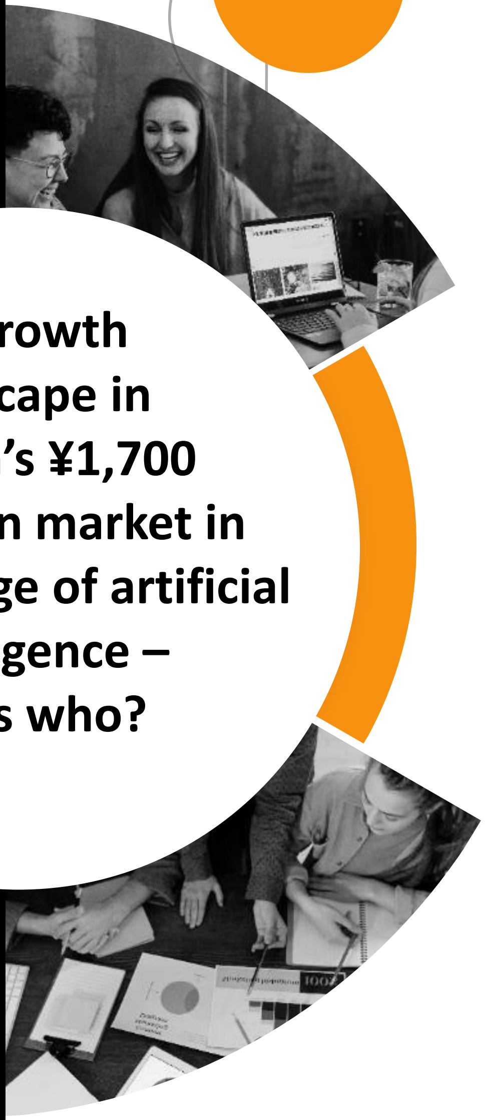
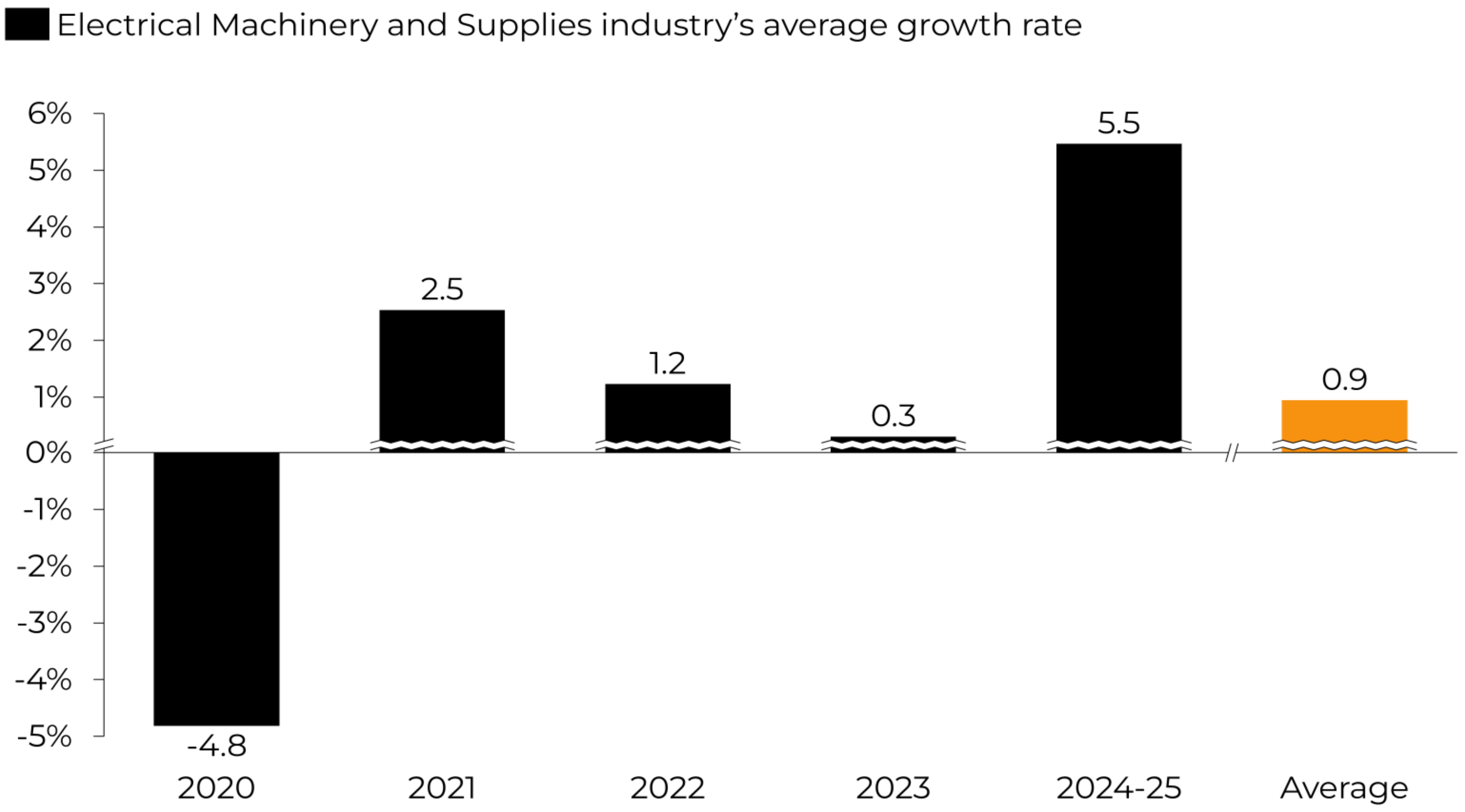
The electrical machinery and supplies industry had its fastest growth year in the FY2024-25 (5.5%) compared to its average growth rate of just 0.9% over the past 5 year.



he growth
andscape in
apan's ¥1,700
rillion market in
he age of artificial
ntelligence –
Who's who?

Who's who?



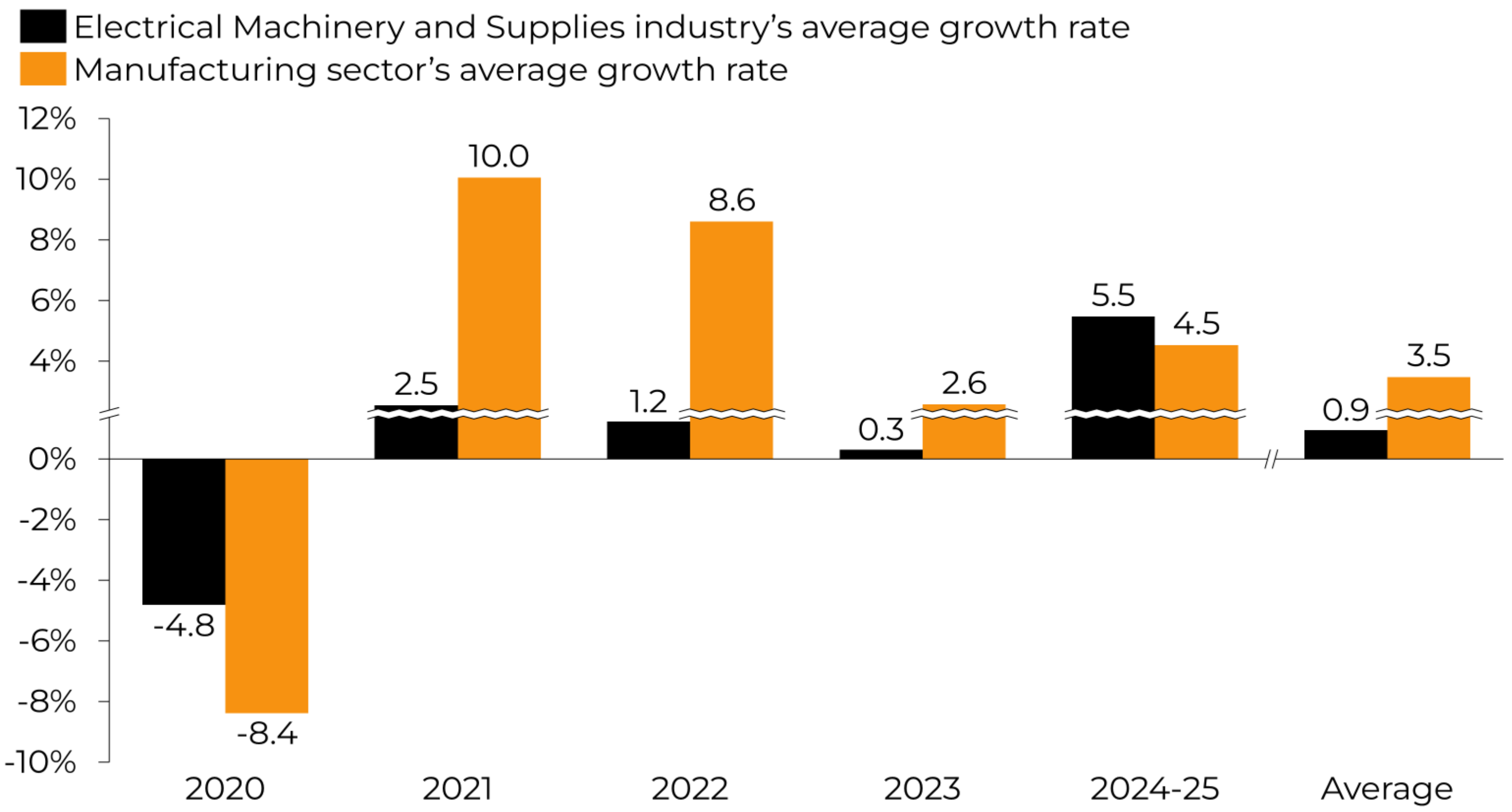
CISSOKO & COMPANY

Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

The industry did better than its sector (manufacturing) as a whole in the FY2024-25, but lagged behind it on average over the past 5 years.

The growth landscape in Japan's ¥1,700 trillion market in the age of artificial intelligence – Who's who?

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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Japan's Electronic Equipment for Information and Communications Industry

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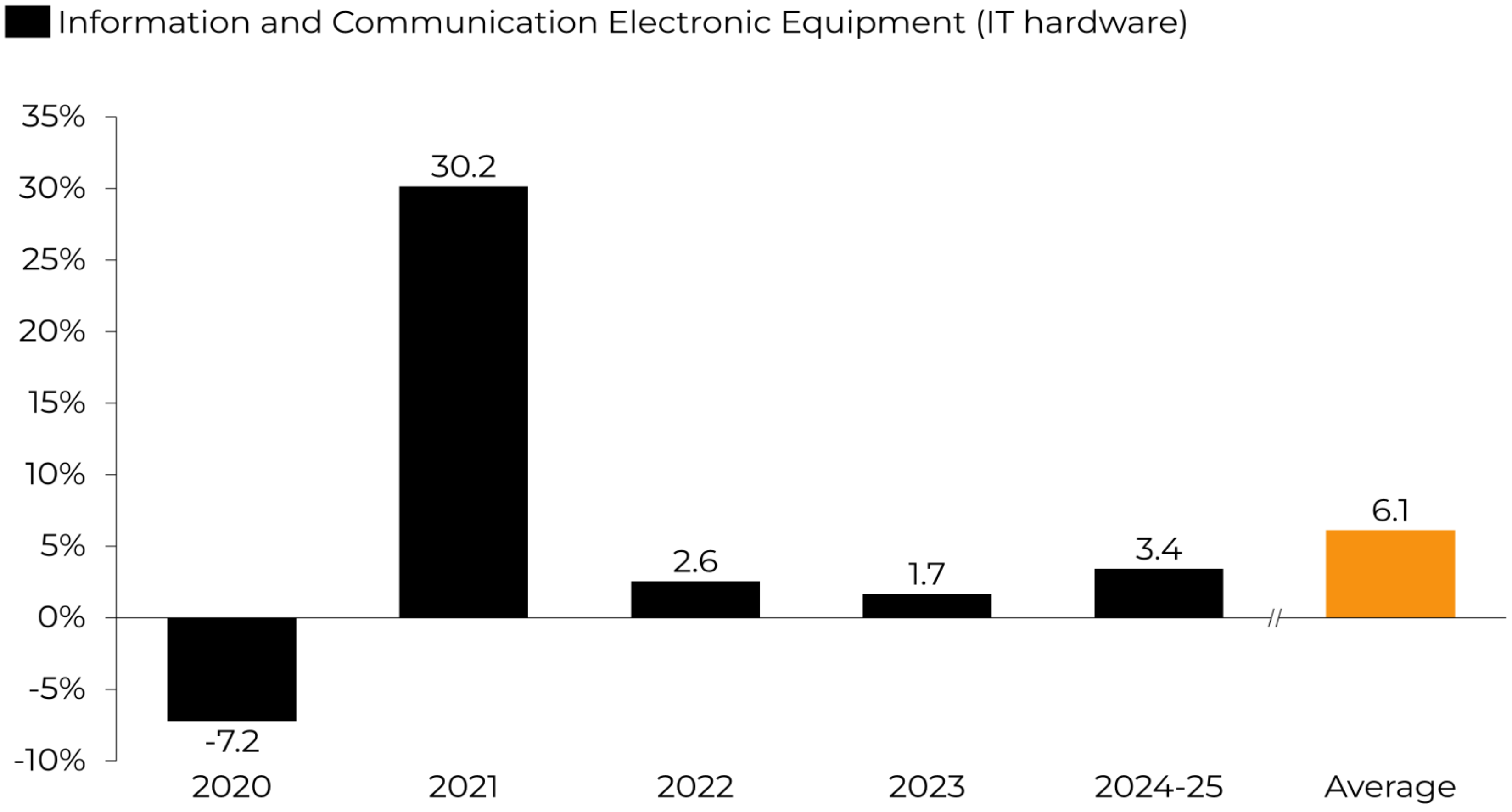
The IT hardware industry's growth rate (3.4%) was almost the same as Japan's average growth rate (3.6%), but it was below its 5-year average growth rate (6.1%) through 2025.

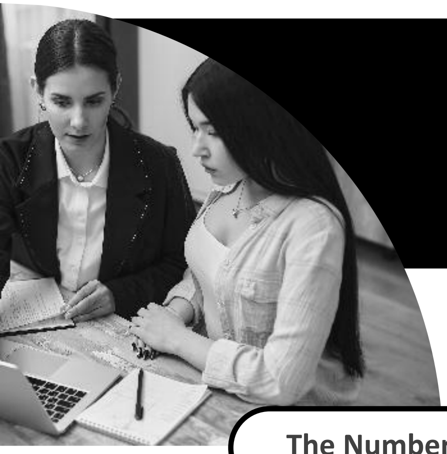
The Number Game

Who's who?



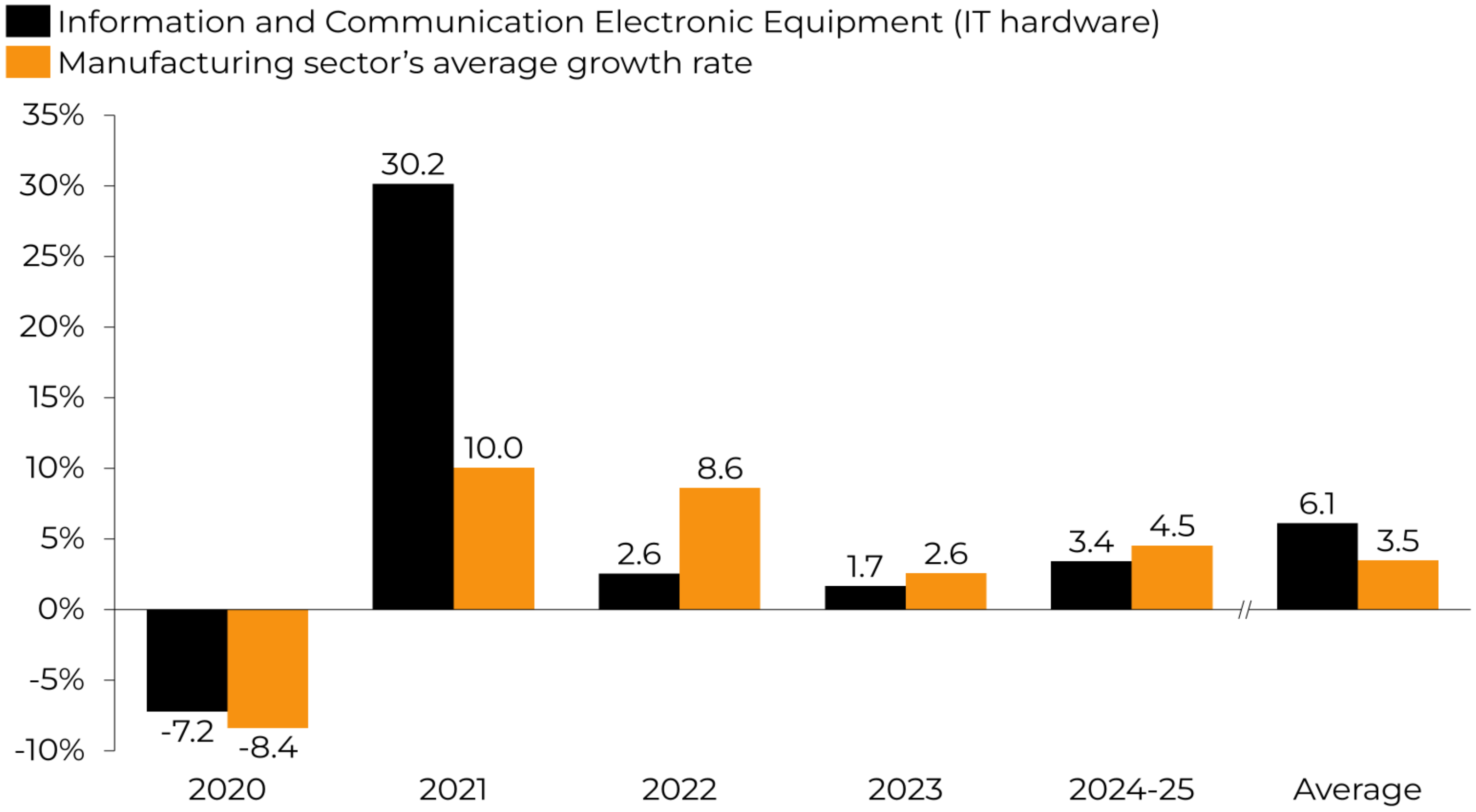
Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

On average, the IT hardware industry grew faster (6.1%) than the manufacturing sector (3.5%) over the past 5 years.
But the sector outperformed IT hardware in the FY2024-25.



The Number Game

Who's who?



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Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

Japan’s Transportation Equipment (Carmakers & parts) Industry

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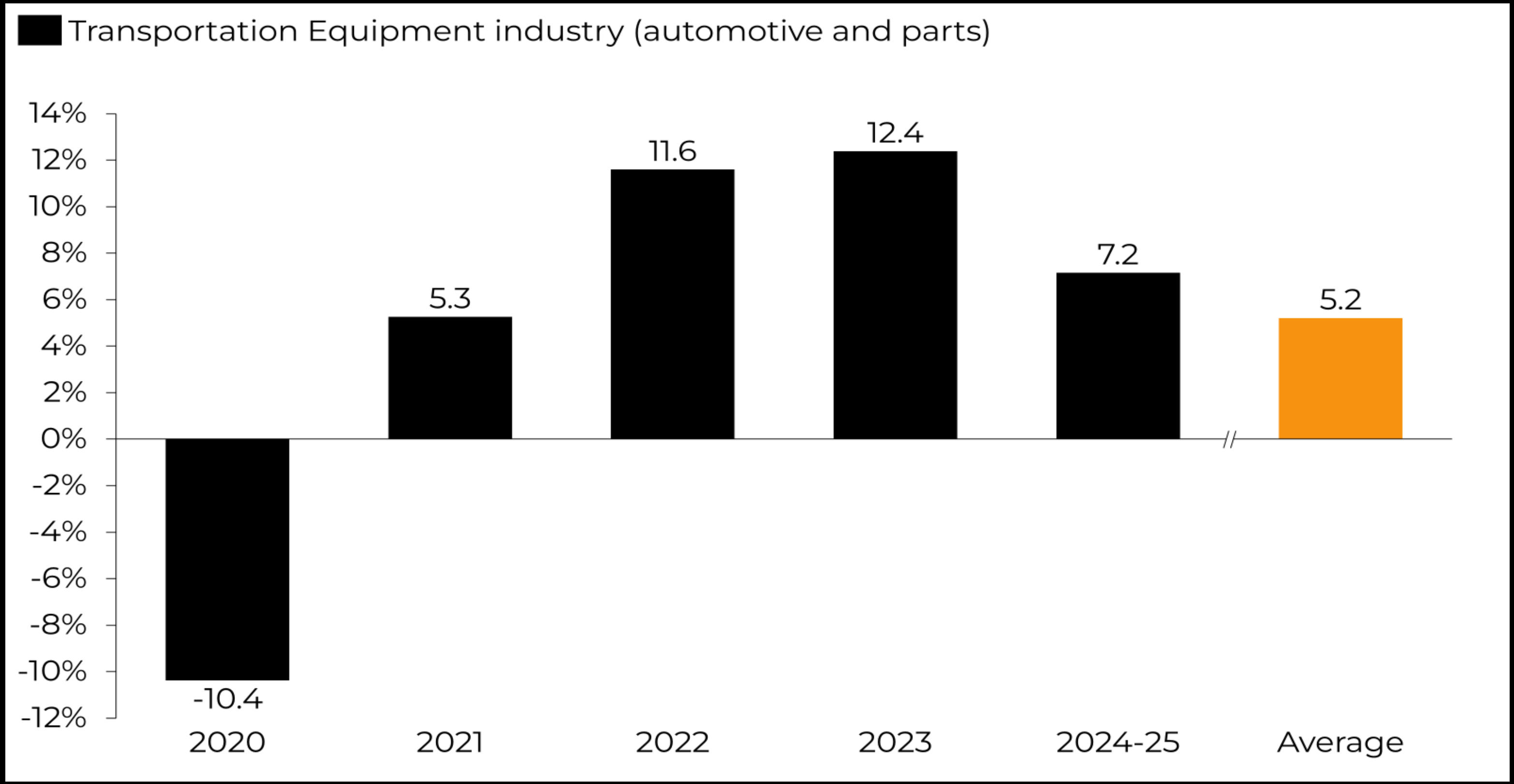
CISSOKO & COMPANY

The transportation equipment industry (automotive & parts, etc.) had its third best year of growth (7.2%) over 5 years in the FY24-25, which beat its average growth rate (5.2%) over the past 5 years.

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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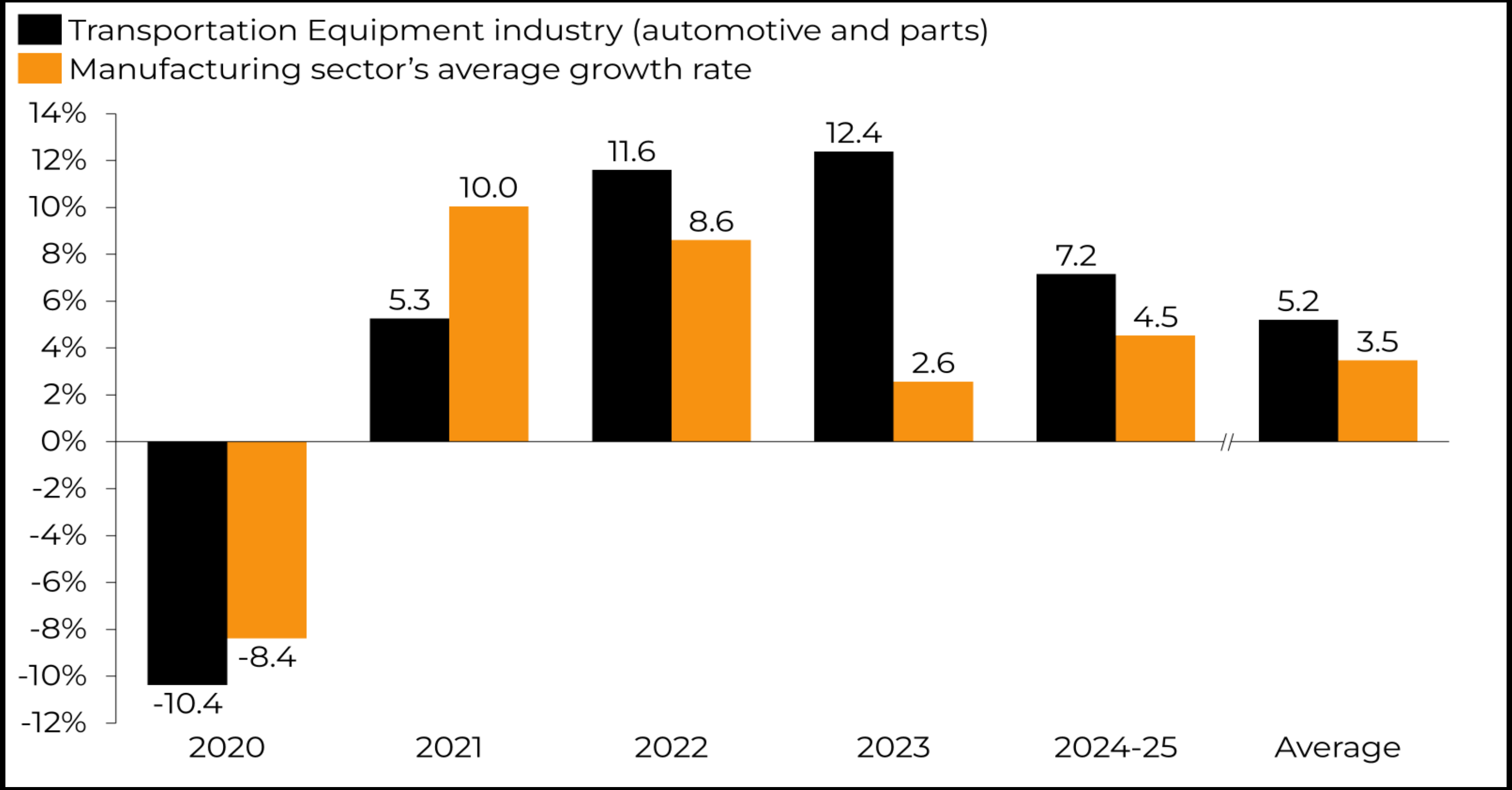
Since FY2022-23, the transportation equipment industry's growth rate has exceeded the manufacturing industry as a whole, and on average, the industry's growth rate beat its sector over 5 years.

Who's who?



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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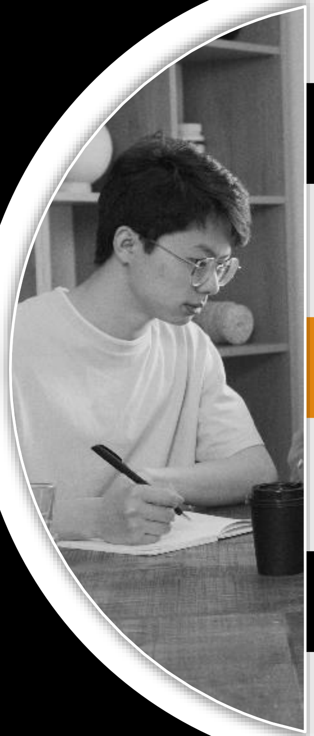
Which Japanese industry was Japan’s GROWTH GOLD Medalist 2025™?

The Electricity Industry is Japan’s Growth GOLD Medalist 2025™

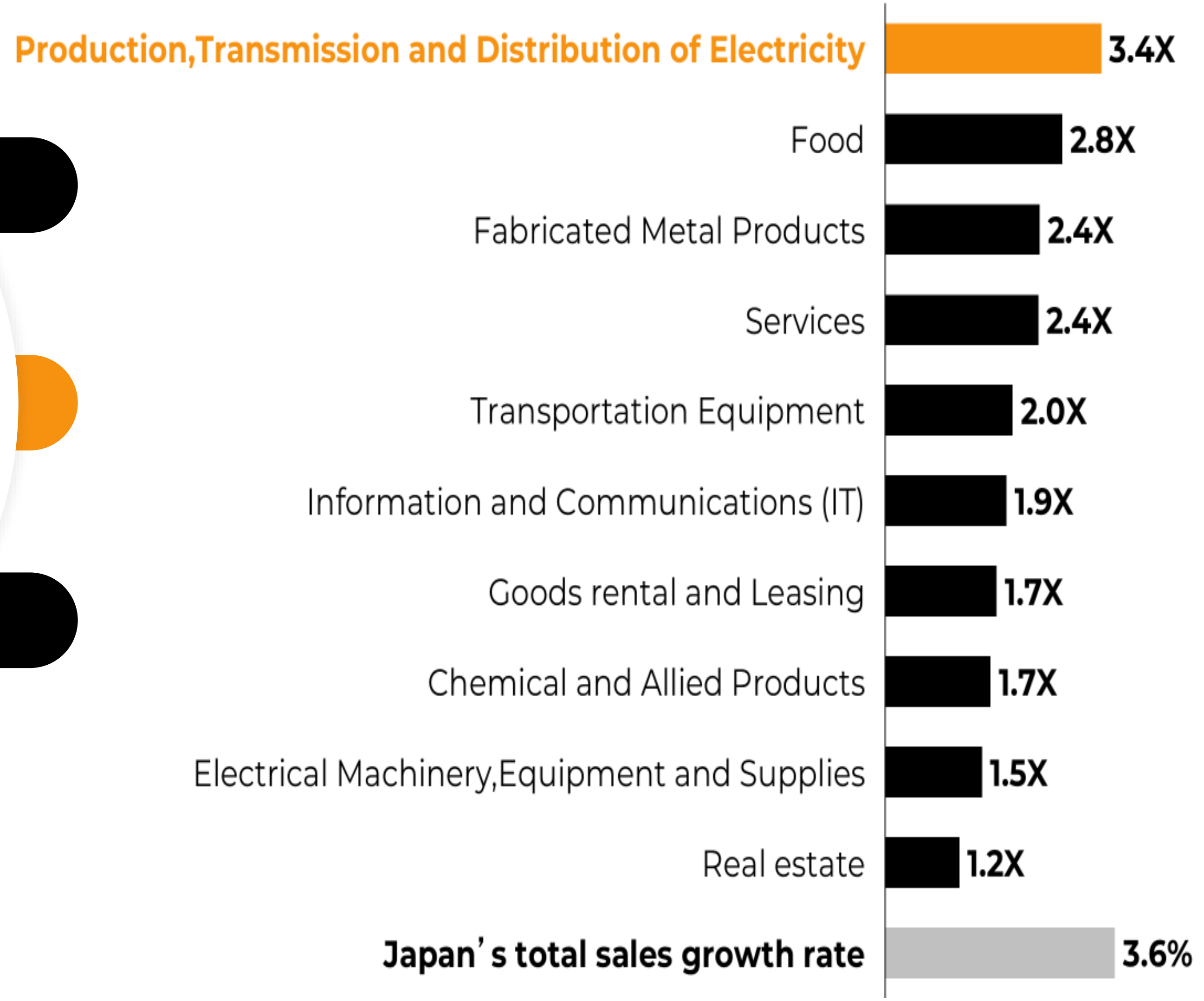
Japan’s Growth Medalists



Japan’s Growth

Medalists

2025™



Sources: Japan METI, Japan official stats, Cissoko & Company Intelligence Note: Total operating profit does not include the finance & insurance industry

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Japan's Top 3 Leading Growth Medalists 2025™

The Land of the Rising Sun

- Total net assets (wealth)
  $30.4 Trillion
- Total Sales FY2025 (ex-finance & Insurance
  $11.3 Trillion
- Manufacturing sector's total sales
  $3.06 Trillion
- Non-manufacturing sector's total sales
  $8.24 Trillion

#1 Electricity industry

#2 Food Industry

#3 Fabricate Metal & Services industry

- Production, Transmission and Distribution of Electricity industry is:
- Japan's GROWTH GOLD Medalist 2025™
- **The industry grew at 3.4x Japan's growth average**

- The food industry is:
- Japan's GROWTH SILVER Medalist 2025™
- **The industry grew at 3.4x Japan's growth average**

- The two industries are neck and neck:
- Japan's GROWTH BRONZE Medalist 2025™,
- **2.4x Japan's average**

Sources: Japan METI, Japan official stats, the US Federal Reserve Bank of Saint Louis, Cissoko & Company Intelligence Note: Total operating profit does not include finance & insurance industry

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Thanks for your time! Discover more from the report on our website.

Do you have any further questions, or would you like to accelerate your success?

Contact them below

Email Address

Experts@cissokomamady.com

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