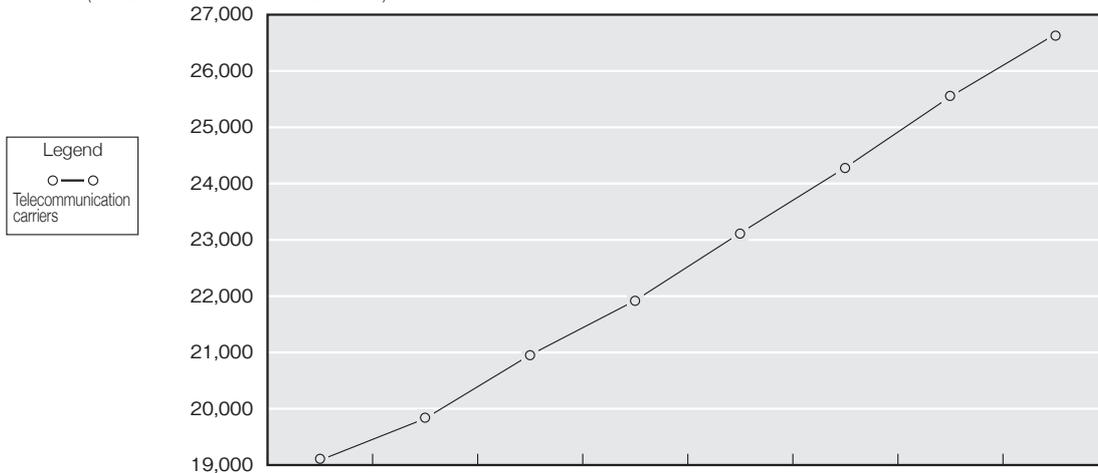


Chapter 1
Movements in the Info-communications
Industry

1-1 Trends in Number of Telecommunications Carriers

(Number of telecommunications carriers)



(Companies)

	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024
Number of telecommunications	19,079	19,818	20,947	21,913	23,111	24,272	25,534	26,642

*Compiled by TCA based on the *Information and Communications in Japan White Paper 2025* published by the Ministry of Internal Affairs and Communications

1-2 Company Sales and Sales in Relevant Business Activities in the Telecommunications Industry

(Million yen)

	Company sales	Sales in relevant business activities
FY2021	20,021,117	14,725,592
FY2022	21,080,641	14,830,024
FY2023	20,405,157	15,157,484

*Compiled by TCA based on the *2023 Basic Survey on the Information and Communications Industry* and the *2024 Basic Survey on the Information and Communications Industry* published by the Ministry of Internal Affairs and Communications

1-3 Telecommunications Industry Sales by Category of Service

Upper lines: sales (million yen), lower lines: percentage of sales (%)

	FY2022	FY2023
Telecommunications industry	14,830,024	15,157,484
	100.0	100.0
Voice transmission	4,371,103	4,080,743
	29.5	26.9
Landline voice transmission	1,385,001	1,449,969
	9.3	9.6
Mobile voice transmission	2,986,102	2,630,774
	20.1	17.4
Data transmission	9,260,248	8,466,499
	62.4	55.9
Landline data transmission	2,756,459	2,715,672
	18.6	17.9
Mobile data transmission	6,503,789	5,750,827
	43.9	37.9
Leased circuits	208,391	175,612
	1.4	1.2
Public wireless LAN	36,399	15,727
	0.2	0.1
IDC (Internet Data Center)	106,958	196,210
	0.7	1.3
Other telecommunications services	846,926	2,203,291
	5.7	14.5

*Notes:

The figure for "landline voice transmission" is the total for domestic and international services.

The figure for "landline data transmission" includes sales from Internet access (ISPs, FTTH, etc.), IP-VPN, and wide area Ethernet.

Figures for telecommunications industry sales and sales by category of service do not have equal totals, as sales figures shown by category of service include companies that did not provide responses.

*Compiled by TCA based on data publicized by the Ministry of Internal Affairs and Communications

1-4 Amounts of Investment in Plant and Equipment Acquired by the Telecommunications Industry

(Million yen)

	FY2022	FY2023
Amounts of investment in plant and equipment	2,823,392	1,957,250
Amounts of investment in plant and equipment (except software)	2,602,007	1,665,144
Software	221,385	292,106

*Compiled by TCA based on the 2023 Basic Survey on the Information and Communications Industry and the 2024 Basic Survey on the Information and Communications Industry published by the Ministry of Internal Affairs and Communications

1-5 Number of Employees by Type of Employment in the Telecommunications Industry

(Number of employees)

	FY2022	FY2023
Number of employees	145,510	91,133
Number of regular employees	144,295	90,871
Permanent employees (excluding employees on loan to other companies/organizations)	95,421	62,457
Non-permanent employees (part-time workers, etc.)	17,723	10,080
Employees on loan to other companies/organizations	30,933	18,000
Temporary employees	1,215	262
Dispatched employees	31,271	12,536

*Compiled by TCA based on the 2023 Basic Survey on the Information and Communications Industry and the 2024 Basic Survey on the Information and Communications Industry published by the Ministry of Internal Affairs and Communications