

Current Issues in Global Furniture



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About the cover: Chest of drawers: ‘George’, 2008/2013, Great Britain (London, Designed
and made by Gareth Neal (1974–), Ash, Artist’s proof from edition of five. Now in V&A
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When local industry meets global forces, or what we might learn from furniture manufacturing in Shizuoka, Japan

Sarah Teasley

✉ Royal College of Art, sarah.teasley@rca.ac.uk

Abstract

Shizuoka, a city partway between Tokyo and Nagoya in Japan's eastern industrial belt, has been home to furniture manufacturers since the seventeenth century. At its heyday, hundreds of SMEs and micro-businesses produced mirror stands and storage chests for the national market, some employing then-advanced machinery for mass production, others creating bespoke products by hand.

Today, twenty years of economic stagnation, offshore competition, changing consumer tastes and distribution systems and an ageing workforce have left the industry a shell of its former self. At the same time, however, some firms are thriving thanks to strategies like targeting niche markets, and local and regional government are keen to identify further strategies to support Shizuoka through its industries.

This paper takes the Shizuoka furniture industry's decline and transformation as a case study for understanding the impact of market conditions, environmental regulations, industrial policy and global trade on furniture as a local industry in advanced industrial nations. It is grounded in two larger perspectives: the social, economic and cultural history of Shizuoka's furniture industry and Japanese furniture industry conditions nationally, now.

Based on interviews with manufacturers, local and regional government officials, industry organisations and consultant designers, site visits and research into industry publications, the paper identifies key actors in the Shizuoka 'ecosystem'. It suggests that stakeholders must cooperate in developing local and regional industrial policy aimed at supporting sustainable industry as part of sustainable communities – whether in Japan, Britain or elsewhere. And argues that ultimately, adaptability is key for manufacturers seeking to thrive in globalising networks, with local and corporate heritage a potentially rich source of ideas.

Keywords: *Local industry, social and economic sustainability, SMEs, manufacturing, industrial policy, furniture*

Introduction

In 2012, I spent several months in Japan researching local furniture industries: how they fared during Japan's postwar economic growth period, the challenges and opportunities they face now and how policy-makers at national, regional and local levels might support them. When not in the archive, I spent days talking with makers, entrepreneurs, designers, engineers, industry association representatives and local and prefectural government officials about their work.

As I travelled between regions, one word regularly came up in discussions: 'Nitori'. Nitori, I soon learned, is that dreaded entity in the furniture world: a large company selling inexpensive offshore-manufactured furniture from suburban 'big box' locations, with which low-end domestic producers simply can't compete.¹

¹ Somewhat like IKEA, Nitori owns and directs all aspects of business from production to sales, allowing for high-volume production, reduced costs and lower prices for consumers. Its in-house designs reflect contemporary Japanese consumers' taste for sleeker, more 'modern' furniture, sometimes in the style of popular local manufacturers, but are made largely in South-East Asia, closer to materials suppliers and with low labour costs, then imported and sold by Nitori, so that profits remain in-house rather than going partly to distributors and retailers. Nitori (nd) Bijinesu moderu: Seizo butsuryu kourigyo, http://www.nitori.co.jp/about_us/business_model/, last access 7 November 2013.

Furniture manufacturers' reaction to Nitori was one of only several very visible signs of the hollowing-out of Japan's furniture manufacturing regions. In Shizuoka, once a major producer of mirror stands and storage chests, an estimated 82% of manufacturers have closed since 1980.² Woodworking has been part of Shizuoka's substantial industrial base since the seventeenth century. In the twentieth century, the city was a major wood furniture manufacturing centre. Today, twenty years of economic stagnation, offshore competition, changing consumer tastes, an ageing workforce and shifts in national and regional industrial policy to emphasise other industries have left the wood furniture manufacturing industry a shell of its former self. But some firms are thriving despite Nitori and its ilk. And both local and regional government officials are determined to do what they can to support sustainable light industry in the city.

This paper takes Shizuoka furniture's transformations as a case study for understanding the impact of external factors such as demographic and other market conditions, environmental regulations, industrial policy and global trade networks on local industry in advanced industrial nations. It looks particularly at moments of transition: how furniture firms have responded to changing conditions, and lessons we might take from these responses. Analysis is grounded in three larger perspectives: the social, economic and cultural history of Shizuoka's furniture industry; Japanese furniture industry conditions nationally; and the idea of 'applied history', or what historical contextualisation and comparison can contribute to decision-making today. Predominantly qualitative, historical methods include interviews, site visits, archival research into industry publications and internal documentation alongside analysis of industry statistics.

Shizuoka furniture's story raises clear parallels, comparisons and links with regions and issues in the UK and elsewhere, and the rich body of published research in the economics, geography, history and sociology of industrial policy, regional development, sustainability, planning studies, industrial organisation and management studies could be introduced to analyse it further. The economic and business history of Japanese manufacturing regions is another important secondary literature.³ The story could also be reframed in the context of wood utilisation and forestry policy, historically and today. Finally, the story could be told comparatively, in relation to existing research on Japanese furniture regions' strategies to combat industrial design.⁴ However, this paper focuses on the Shizuoka case study. Through a focused narrative of Shizuoka furniture's historical fortunes and current-day practices, it presents manufacturers' strategies for countering a challenging environment and outlook, and aims to stimulate thinking about how manufacturers, policy-makers and local residents alike might revitalise historical manufacturing regions.

The paper begins with Shizuoka furniture's history and position in Japanese furniture manufacturing, then describes the industry today, including three case studies in how manufacturers are adapting to

² This figure includes only companies of over four employees, which dropped from 624 companies in 1980 to 114 companies in 2012. Keizai Sangyo Sho (1981) *Kogei tokei chosa, Showa 55-nen kakuho, Shichoson-hen*. Keizai Sangyo Sho, Tokyo, cited in Kumeno, H. ed. (2010) *Sanchi no henbo to jinteki nettowaku: Asahikawa kagu sanchi no chosen*. Ochanomizu Shobo, Tokyo, Table 1-1, 17, and Keizai Sangyo Sho Daijin Kanbo Chosa Tokei Gurupu (2014) 'Heisei 24-nen Kogyo Tokei-Hyo 'Kogyo Chiku-Hen'', published 25 April 2014, available at <http://www.meti.go.jp/statistics/tyo/kougyo/result-2.html>, last access 26 June 2014. Japanese Ministry of Economy, Trade and Industry (METI) industrial census statistics do not include micro-businesses of 1-3 employees so do not represent the complete furniture industry ecosystem, but remain a useful indication of industry health.

³ There is a large body of Japanese language scholarship on Japanese regional manufacturing, or *jiba sangyo*. In English, see Tanimoto M. ed. (2006) *The Role of Tradition in Japan's Industrialisation*. Oxford University Press, Oxford; Howell, D. (1995) *Capitalism from Within: Economy, Society, and the State in a Japanese Fishery*. University of California Press, Berkeley; Wigen, K. (1995) *The Making of a Japanese Periphery, 1750-1920*. University of California Press, Berkeley; Rausch, A. (2010) *Cultural Commodities in Japanese Rural Revitalization: Tsugaru Nuri Lacquerware and Tsugaru Shamisen*. Brill, Leiden; and Izushi, H. (2001) Limits of local networks: Use of local and external knowledge in technological adaptation in the Seto ceramics industry. In *Global Competition and Local Networks* R. McNaughton and M. Green eds. Ashgate, Aldershot, 197–215.

⁴ See for example Hiroyuki Noguchi's work on the Okawa region, including: Noguchi, H. (2001) Fukyo-shita no kagu sangyo to Okawa kagu no genjo, *Chusho shokogyo kenkyu* 68, 58-68; Noguchi, H. (2001) Okawa no kagu sanchi to chiiki keizai, *Jumin to jiji* 460, 54-57; Noguchi, H. (2006) Fukyo-shita no kagu sangyo, *Saga daigaku keizai ronshu* 38:6, 83-94.

today's challenging climate. Ultimately, it points to adaptability and the ability to update unique attributes as key factors for manufacturers wishing not only to survive but to thrive in changed environments: whether in Japan, the UK or other advanced industrial nations.

2. Shizuoka's furniture industries

The city of Shizuoka is located halfway (170 km) between Tokyo and Nagoya, at the centre of Japan's industrial belt on the east coast of the country's largest island, Honshu.⁵ In 1606, retired *shogun* Tokugawa Ieyasu established a secondary court in present-day Shizuoka, then called Sunpu.⁶ In addition to the direct patronage of the Tokugawa family, Japan's rulers in the seventeenth-nineteenth centuries, Shizuoka was blessed geographically. The city's location gave manufacturers unusually convenient access to two major markets, and its siting on the alluvial plain below Mount Fuji meant good agriculture and – for furniture manufacturing and other woodworking – rich timber supplies. By the nineteenth century it was a wealthy castle and market town, a regional administrative centre and home to manufactures including lacquerware, decorative woodcarving and chest (*tansu*) production.⁷

The mid-nineteenth century saw Japan's ruling system challenged by internal dissent and foreign powers, resulting in regime change known as the Meiji Restoration in 1868. As the new regime actively re-engaged in global trade and diplomacy to establish Japan as an international power and gain foreign currency, light industry exports became major business and the Shizuoka industries gained an important new market. Exports to Europe and the US proved particularly lucrative for Shizuoka's lacquerware industry, formed of specialist turners and joiners as well as lacquerers and decorators.⁸ By the 1900s, however, Shizuoka's export lacquer bowls and boxes had gained the unfortunate reputation of being cheap and of poor quality.⁹ To improve products and the region's image, in 1905 the city's government opened a product display hall to broker sales and showcase local products. The hall also offered design consulting, technical training and design resources.

In the 1880s, some Shizuoka lacquerware workshops saw a domestic market opportunity and translated their carving and finishing techniques to develop a new, hybrid product that combined western and Japanese furniture forms: mirror stands. Japanese women in the early modern period used a rectangular mirror on a wooden box base for arranging hair and makeup, similar to a dressing table but used seated on the floor.¹⁰

⁵ Shizuoka is the name of both Shizuoka Prefecture and its capital city, Shizuoka City. In 2003, Shizuoka City and neighbouring Shimizu City, a historical port town, were unified for administrative purposes. Unless otherwise specified, in this paper 'Shizuoka' refers to the historical city of Shizuoka, without Shimizu, rather than the prefecture. 'Shizuoka furniture' refers to manufacturers in Aoi and Suruga Wards, home to the historical furniture neighbourhood and expansion areas post-1960.

⁶ For the early modern history of Shizuoka City see Shizuoka-shi ed. (1979) *Shizuoka-shi shi: Kinsei*. Shizuoka-shi, Shizuoka.

⁷ Shizuoka-shi, Shizuoka-shi Kyoiku Iinkai eds. (2006) *Seirei Shitei Toshi igyo kinen jigyo: 'Okaerinasai Sunpu no yosegi saiku' ten* exh. cat. Shizuoka Art Gallery, Shizuoka.

⁸ For the history of Shizuoka's lacquerware industry see Ito, T. ed. (1960) *Shizuoka moku-urushi sangyo-shi*. Shizuoka Moku-Urushi Kyodo Shokusan Kunrenjo, Shizuoka.

⁹ Shizuoka-shi Bussan Chinretsukan (1912-14) *Shizuoka-shi Bussan Chinretsukan Nenpo* 8-9.

¹⁰ Shizuoka-shi Keizai-kyoku Shoko-bu Chiiki Sangyo-ka (2008) *Shizuoka-shi no jiba sangyo jishi*. Shizuoka-shi Keizai-kyoku Shoko-bu Chiiki Sangyo-ka, Shizuoka.



Figure 1: Woman using a wooden mirror stand to apply makeup. Tamagawa Shucho, Mirror of Elegance [Furyu kesho kagami], woodblock print on paper, Tokyo Japan, c. 1790-1803 © Trustees of the British Museum.

The Shizuoka mirror stand manufacturers retained the mirror but placed it on a western-style chest of drawers, finished in lacquer and decorative carving.

Subsequently, Shizuoka's furniture industry has consisted of two related but discrete sectors: chest makers, whose family workshops had begun in the early modern period, and the lacquer-origin workshops, who specialised in mirror stands before diversifying in the postwar decades into other products including sewing boxes and sideboards.¹¹ Chests too are finished in lacquer, often a transparent lacquer over Japanese yellow birch (*kihada*) veneer for a distinctive yellow glow.

¹¹ This division persisted into the 1960s, with the two industries treated separately in reports on the regional industry. See for example Kagawa K. (1963) Shizuoka-ken no mokko seisan. *Kagu mansuri* 40, 20-21.



Figure 2: Sideboards in production, showing wood before and during lacquering process. Fukui Mokkojo, 2012, photograph by Sarah Teasley.

Both mirror stand and chest sectors followed a complex if not unusual putting-out structure until the 1970s.¹² Organisation hinged on powerful commissioning agents (*tonya*) who contracted production in addition to brokering sales to wholesale distributors in Tokyo and Osaka. Production proceeded in a fine division of labour.¹³ Agents communicated production volumes and designs based on retailers' requests to carpenters who built the basic frame and coordinated production. This meant ordering wood, veneers and plywood from specialist shops, as well as contracting out specialist work to planers, routers and machine and hand-carvers then sending the pieces to finishing and decoration shops.¹⁴ Some stages were mechanised but much work was done by hand, and most workshops dried wood naturally rather than using artificial curing through the 1960s. Both the mirror stand and chest industries depended on artisans' skills with wood, so plastics and metals were not commonly used, though a separate machine tools industry developed locally to support furniture-makers. Workshops were concentrated in one neighbourhood so that work could be easily carted from workshop to workshop as it progressed, with the carting itself a specialist sub-occupation. The neighbourhood housed numerous trade associations, each corresponding to a particular product or stage in the process such as sewing boxes, mirror stands and painters and decorators, as well as the Shizuoka prefectural industrial research and testing centre for wooden furniture.¹⁵ And chest and mirror-stand makers co-

¹² On the characteristics of mid-twentieth century Shizuoka city furniture manufacturing see Ueno, K. (1951) Shizuoka ni okeru saikin no moyo ni tsuite no hokoku. *Kagu to mokko* 10, 24-25. For Shizuoka prefecture see Ando, Y. (1951) Shizuoka-ken no mokushitsuchiku kogyo gaikan. *Kagu to mokko* 18, 6-8. Other sources include Yabumoto M. (1975) *Sengo Shizuoka Kagu Sangyoshi: Shizuoka Kyodai Kagu Shokogyo Kyoudo Kumiai no kiroku*. Shizuoka Kagu Sangyo-shi Kankokai, Shizuoka, the principal furniture manufacturers' association's own history covering c. 1945-75.

¹³ Yabumoto, M. (1975) *Sengo Shizuoka Kagu Sangyoshi: Shizuoka Kyodai Kagu Shokogyo Kyoudo Kumiai no kiroku*. Shizuoka Kagu Sangyo-shi Kankokai, Shizuoka, Fig. 3-3-4, p. 182; annotated by Tsuchiya Koichi, 11 December 2012.

¹⁴ Fujita O. and Tsuchiya K (2012) Interview 11 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka; Yabumoto, M. (1975) *Sengo Shizuoka Kagu Sangyoshi: Shizuoka Kyodai Kagu Shokogyo Kyoudo Kumiai no kiroku*. Shizuoka Kagu Sangyo-shi Kankokai, Shizuoka.

¹⁵ Yabumoto, M. (1975) Chapter Two 'Gyokai dantai no togo', *Sengo Shizuoka Kagu Sangyoshi: Shizuoka Kyodai Kagu Shokogyo Kyoudo Kumiai no kiroku*. Shizuoka Kagu Sangyo-shi Kankokai, Shizuoka, pp. 88-123; Shizuoka-ken Shizuoka Kogyo Gijutsu Senta (2009) *100-nen no ayumi*. Shizuoka-ken Shizuoka Kogyo Gijutsu Senta, Shizuoka. On the origins of industry associations in Japan see Omori, K. (2006) How Local Trade Associations and Manufacturers' Associations

existed within a rich variety of workshop-based light industries, including wood and lacquered tableware, wooden sandals and wooden toys.¹⁶

Shizuoka is one of a number of wood furniture manufacturing regions, spreading from Asahikawa in Hokkaido, in far northern Japan, to Okawa (also spelled Ohkawa), located on the southern island of Kyushu.¹⁷ Regions differed in specialisations as well as in organisation. Long-standing furniture manufacturing regions like Okawa operated within the putting-out system and specialised in *hakomono* ('box things'), traditional furnishings like chests and mirror stands that would have stood in early modern Japanese homes as well.¹⁸ In contrast, regions like Asahikawa which developed furniture manufacturing industries in the twentieth century often produced western-style furniture *i.e.* tables, chairs and beds, known collectively as *ashimono* ('leg things').¹⁹ In some areas, industry was led by one large manufacturer.²⁰ Some manufacturers dealt directly with department stores and furniture specialty retailers, but most contracted with Japan's complex distribution system.²¹

Shizuoka's furniture, particularly its mirror stands, was seen as less prestigious than that of some other regions. This was partly to do with perception of quality: like the export lacquerware sector from which they developed, Shizuoka mirror stand-makers were known for cheaply-made products.²² However, the extreme subdivision of labour made Shizuoka workshops particularly dependent on the commissioning agents, as workshops operated entirely within the complex system organised by agents, and agents controlled the only clear connection to retailers. In the postwar years, this was one major reason for trade organisation formation, but throughout Shizuoka's history created a reputation for lack of assertiveness relative to makers in other regions. This brought original equipment manufacturer (OEM) contracts as reputation suggested Shizuoka makers would not mind if their work's provenance remained unknown (and could also be contracted for less), but also hampered the development of a 'Shizuoka brand'.²³ Geographical proximity to two of Japan's largest markets was also a factor in Shizuoka's curious mix of commercial popularity and lesser reputation: proximity made Shizuoka's workshops popular with agents, but some critics feared it also made workshops 'lazy', as convenience allowed them to 'get away' with poor quality.²⁴

3. Shizuoka furniture in the twentieth century

Major twentieth-century events had a direct impact on Shizuoka's wood industries, furniture and otherwise. As the mirror stand industry example shows, urbanisation and a growing middle class in the 1920-30s had increased demand, swelling workshop numbers and diversifying products.²⁵ But in

Worked in Pre-war Japan. In *The Role of Tradition in Japan's Industrialisation* M. Tanimoto ed. Oxford University Press, Oxford, 157-180.

¹⁶ Ando, Y. (1951) Shizuoka-ken no mokushitsuchiku kogyo gaikan. *Kagu to mokko* 18, 6-8.; Shizuoka-shi Chiiki Sangyo-ka (2010) *Shizuoka-shi no jiba sangyo*. Shizuoka-shi Chiiki Sangyo-ka, Shizuoka.

¹⁷ Geographical concentration was usual for modern as well as early modern Japanese industries, and remains evident in cities like Kyoto today. One vivid description of town and neighbourhood-specific industrial production (*jiba sangyo*) in the late nineteenth century is Dresser, C. (1882) *Japan: its architecture, art and art manufacturers*. London, Longmans, Green.

¹⁸ Okawa Kagu Kogyokai (1981) *Kagu sanchi Okawa no hensen*. Okawa Kagu Kogyokai, Okawa.

¹⁹ Kimura, M. (2004) *Asahikawa kagu sanchi no rekishi*. Asahikawa Fukko Kosha, Asahikawa; Kumeno, H ed. (2010) *Sanchi no henbo to jinteki nettowaku: Asahikawa kagu sanchi no chosen*. Ochanomizu Shobo, Tokyo.

²⁰ From the late nineteenth century onwards, new workshop neighbourhoods in port cities like Yokohama and Kobe created chairs, beds and tables – known as *ashimono* or 'leg things' – for foreigners and elite Japanese. The number of 'leg thing' regions grew further as entrepreneurs established factories to cater for growing demand for western-style furniture in the 1920s. An overview of business and design strategy of one major maker, Tendo Mokko, is Teasley S. (2013) Sarah Teasley – Tendo Mokko Case Study. InnoMatNet 2013, <http://www.innomatnet.eu/case-studies>, last access 7 November 2013.

²¹ A good description of postwar Japan's furniture distribution and retail networks is Arai, R. (2011) Sengo Nihon ni okeru shuyo mokusei kagu meka no kagu ryutsu no hensen: homu yusu kagu, kontorakuto yusu kagu, yunyu kagu no ryutsu keiro no hensen. *Kyoei Daigaku kenkyu ronshu* 9, 83-107.

²² Ueno, K. (1952) Shizuoka kagu no kukyo dakai ni: seizo, toso ittai de kairyo e. *Kagu to mokko* 29, 11; Ueno, K. (1951) Shizuoka ni okeru saikin no moyo ni tsuite no hokoku. *Kagu to mokko* 10, 24-25.

²³ Sano, Y. (2012) Interview 12 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

²⁴ Shizuoka-ken Shizuoka Kogyo Shikenjo (1954-59) *Shikoken Nyusu*.

²⁵ On consumption and domesticity in early twentieth century Japan see Sand J. (2003) *House and home in modern Japan: architecture, domestic space, and bourgeois culture, 1880-1930*. Harvard University Press, Cambridge.

1951, Shizuoka prefecture's wood industries were at 80% of their prewar total, due to wartime consumption restrictions and the chaos, destruction and poverty of the Pacific War (1941-45) and Allied Occupation (1945-52) years.²⁶

Famously, the Korean War (1950-53) kickstarted postwar Japan's economic recovery. Incomes rose nationally from the mid-1950s, allowing consumers, corporate and public organisations to rebuild and refurnish public spaces, businesses and eventually dwellings as well. Building and renovation provided Shizuoka's manufacturers with ready customers. An annual trade fair, launched by workshop owners in 1951, helped publicise Shizuoka products to national distributors, and also signalled a small but significant shift in power from commissioning agents to trade associations.²⁷

In 1951, Shizuoka prefecture's wood, lacquerware and bamboo industries were worth an estimated 11 billion yen.²⁸ Furniture and fixtures, located primarily in Shizuoka city, comprised 36% of the industry, with wooden sandals (*geta*) the largest share at 40% and smaller percentages of musical instruments, decorative lacquerware, desktop items, buckets and wooden packaging.

As in European nations, government strategy for economic recovery also included exports, particularly to the lucrative American market. In addition to products for the domestic market, Shizuoka's wood manufactures became key exporters of sewing machine tables, wooden sandals, salad bowls and toys for the American market, with sewing machine tables particularly allowing crossover from mirror-stand workshops



Figure 3: Mirror stand prototypes made by the Shizuoka City Industrial Art Research Institute, shown in the First Annual Light Industry Exhibition, Shizuoka, 1951, in Shizuoka-shi Shoko-bu Sangyo Kogei Senta ed. (1981) *Shizuoka-shi Shoko-bu Sangyo Kogei Senta Soritsu 30 shunen kinenshi*. Shizuoka-shi Shoko-bu Sangyo Kogei Senta, Shizuoka.

²⁶ Ando, Y. (1951) Shizuoka-ken no mokushitsuchiku kogyo gaikan. *Kagu to mokko* 18, 6-8. On Japan in the late 1940s see Dower, J. W. (1999) *Embracing Defeat: Japan in the Wake of World War II*. London, Penguin Books. Nationally, war supported some manufacturers, as fortunate firms contracted with the wartime Ministry of Munitions; during the Occupation as well, commissions to build furniture for Allied Occupation housing gave workshops access to materials, fuel and income. Sources suggest, however, that Shizuoka workshops were little affected by the Occupation commissions, perhaps due to their small scale and focus on Japanese-style products and techniques rather than western-style ones. See for example Henshu-bu (1951) Ichigatsuchu no tokucho kagu nyusatsu kekka. *Kagu to mokko* 11, 31.

²⁷ Shizuoka Furniture Manufacturers Association (nd) promotional materials archive, accessed 11 December 2012; Yabumoto, M. (1975) *Sengo Shizuoka Kagu Sangyoshi: Shizuoka Kyodai Kagu Shokogyo Kyoudo Kumiai no kiroku*. Shizuoka Kagu Sangyo-shi Kankokai, Shizuoka.

²⁸ Ando, Y. (1951) Shizuoka-ken no mokushitsuchiku kogyo gaikan. *Kagu to mokko* 18, 6-8. The figure for furniture includes 'furniture and fixtures', 'mirror stands' and 'sewing machine tables', all given separately in the 1951 article (and indicative of industry divisions between mirror stands and chests, and between domestic and export products, at the time).

With housewares a small but significant facet of postwar industrial strategy, national, prefectural and city industrial promotion targeted light (crafts) as well as heavy industry (steel, chemicals, shipbuilding). Public industrial research institutes provided immediate support, offering materials and technical advising, product testing and bookable workshops with advanced machinery.²⁹ For furniture-makers, Shizuoka's city and prefectural institutes also offered design consultancy, competitions and classes for specific techniques and products. Period records and manufacturer and institute staff recollections suggest that the two institutes and workshops enjoyed warm relations, and that design and technical consultancy particularly helped Shizuoka's makers improve product quality and design for consumer trends.³⁰

The 1960s saw booming sales for Shizuoka furniture, as consumers nationwide used increased income to furnish their homes and provide dowries, conventionally furniture including a chest for *kimono*, mirror stands and a new Shizuoka product: sewing boxes.³¹ The chest-makers retained their clientele and product lines, and the rising popularity of westernised interiors brought mirror stand-makers to develop further products: sideboards, dressing tables and western-style storage units. However, the boom years proved short-lived. In 1964, the Ministry of International Trade and Industry (MITI) became concerned that neighbourhood-based industries like Shizuoka furniture were inherently inefficient and launched a national strategy to raise manufacturing SME productivity through rationalisation.³² Micro-workshops were encouraged to merge, consolidating previously scattered processes under one roof, simplifying the production chain and reducing overhead and labour costs. Firms were urged to move to suburban industrial parks, where they could share expensive and otherwise unobtainable machinery and other facilities, and were more convenient for Japan's growing motorway system, replacing train transport with trucks. The move was also intended to mitigate the fire danger of densely-packed wooden workshops, and from the 1970s onwards to improve urban air quality.³³

²⁹ The official history of Shizuoka prefecture's industrial research centre is Shizuoka-ken Shizuoka Kogyo Gijutsu Senta (2009) *100-nen no ayumi*. Shizuoka-ken Shizuoka Kogyo Gijutsu Senta, Shizuoka. A useful summary of public design promotion activities in postwar Shizuoka is Kuroda H. (2003) Shizuoka-ken ni okeru dezain fukko jigyo no kensen. *Shizuoka Bunka Geijutsu Daigaku kenkyu kiyō* 3, 77-84.

³⁰ Kobayashi, M. (2012) Interview 18 October, Shizuoka Furniture Manufacturers Association, Shizuoka; Fujita, O., Tsuchiya, K (2012) Interview 11 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

³¹ On Shizuoka furniture industry in the early 1960s see Kagawa, K. (1963) Shizuoka-ken no mokko seisan. *Kagu mansuri* 40, 20-21 and Shizuoka kagu gyokai no genjo (1965) *Kagu sangyo* 6:7, 120-124.

³² Tsusho Sangyo Sho Kogyo-kyoku Zakka dai-ichi ka (1965) *Mokusei kagu seizo sangyo jittai chosai hokokusho (Chusho kigyo kindaiika sokushin ho)*. Tsusho Sangyo Sho, Tokyo.

³³ As one cabinetmaker reminisced, small fires illuminated the neighbourhood at night well into the 1970s. Fukui, H. (2012) Interview 12 December, Fukui Mokkojo, Shizuoka.



Figure 4: Furniture-making competition, Shizuoka City Industrial Art Research Institute, August 1953, in Shizuoka-shi Shoko-bu Sangyo Kogei Senta ed. (1981) *Shizuoka-shi Shoko-bu Sangyo Kogei Senta Soritsu 30 shunen kinenshi*. Shizuoka-shi Shoko-bu Sangyo Kogei Senta, Shizuoka.

State intervention had mixed results. Some Shizuoka firms saw consolidation improve volume and profit. But with still-constant sales, many proved uninterested in adapting to the new, more ‘rational’ organisation, even though the new suburban locations put stress on the putting-out system, as some firms relocated and others did not. Community dissipated as homes were separated from workshops and makers left at day’s end, rather than gathering in neighbourhood pubs.³⁴ Increased distance made it more difficult to move products between workshops, putting strain on the putting-out system. The move had an adverse effect on knowledge transfer between the prefectural research institute and manufacturers, too. The institute’s information, testing and consultancy functions remained popular, but with the institute now driving rather than walking distance from workshops, casual interaction waned.

Policy was not entirely to blame for Shizuoka furniture’s decline after 1970, as manufacturers had also misjudged market demand. By the early 1970s, established households stopped purchasing once they had acquired furnishings, and the growing popularity of western-style interiors, particularly amongst newly-adult baby boom consumers, left Shizuoka’s Japanese-style furniture antiquated and increasingly undesired.³⁵ Western-style furniture makers too, suffered, as furniture suites given to newly married couples fell from fashion. Manufacturers adapted with new product lines and styles, but external factors played a role as well. Imports, first of cheaper Asian furniture then – thanks to the strong yen of the mid-1980s – luxury European and American furniture, offered consumers increased choice and novelty and Shizuoka’s manufacturers further competition.³⁶ By 1981, the regional government and manufacturer associations were launching plans to revitalise the industry.³⁷

³⁴ Sakuragawa, S., Sano, Y., Tanaka, N. (2012) Interview 18 October, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

³⁵ Shizuoka-ken Kagu Kogyo Kumiai et al ed. (1982) *Shizuoka-ken mokusei kagu sanchi fukko keikakusho*. Shizuoka-ken Kagu Kogyo Kumiai, Shizuoka; Sakuragawa, S. (1997) Shizuoka kagu no 21 seiki ni mukete no charenji. *Mokuzai kogyo* 52:3, 127-128.

³⁶ Kumeno, H ed. (2010) *Sanchi no henbo to jinteki nettowaku: Asahikawa kagu sanchi no chosen*. Ochanomizu Shobo, Tokyo, Table 1-4, 20.

³⁷ Shizuoka-ken Shoko-bu Jiba Sangyo-ka ed. (1981) *Shizuoka-ken mokusei kagu sanchi fukko bijon: Tsuyoi kyoso-ryoku o motsu sogo kagu sanchi wo mezashite*. Shizuoka-ken Shoko-bu Jiba Sangyo-ka, Shizuoka; Shizuoka-ken Kagu Kogyo Kumiai et al ed. (1982) *Shizuoka-ken mokusei kagu sanchi fukko keikakusho*. Shizuoka-ken Kagu Kogyo Kumiai, Shizuoka.

In the 1990s, economic stagnation and uncertainty created a decade of diminished consumption and price-consciousness just as distributors, retailers and consumers discovered cheaper Chinese furniture, marking a double-blow. In a further challenge, growing consumer preference for western-style condominiums (*manshon*), often with built-in storage units and no place for sideboards or chests, reduced practical demand for Shizuoka's products. And changing social customs and fashion meant that younger women both wore *kimono* less and were less interested in owning them, curtailing the market for dowry chests.

With Shizuoka's existing products increasingly incompatible with the domestic market, trade associations and prefectural and city research institutes fought back. Efforts included product R&D based on market research and co-design, a new Shizuoka Design Centre providing targeted consultancy and experimental diversification into new areas such as street furniture, built-in shelving for prefabricated housing, earthquake-proof construction and design for ageing – one of contemporary Japan's few growth markets.³⁸

However, external factors and the industry's inability to match new price and design expectations proved too strong for such innovative, design-research-driven efforts. As an industry, Shizuoka furniture profits shrank 70% between 1980 and 2005.³⁹ Decline hit employment hard as well. In 1980, Shizuoka boasted 624 furniture manufacturers with more than four employees, employing 5986 people.⁴⁰ In 1990, there were 509 companies with 5,544 employees. The 'lost decade' of the 1990s accelerated hollowing-out: in 2000 the industry had nearly halved to 277 firms with 2,325 employees, and by 2005, Shizuoka was home to 182 firms with 1563 employees, a drop of 64.2% in the number of firms and 71.8% in the number of workers between 1990 and 2005.

4. More than survival: Shizuoka furniture today

Subsequent figures are no cheerier. In 2012, Shizuoka's furniture manufacturing industry employed 1449 people, and consisted of 114 manufacturers.⁴¹ These figures represent a 59% decline since 2000, and an 82% drop since 1980.⁴²

Japan's ageing population accounts for part of the decline: some retiring owners fold the company rather than ask their children to continue the business. The challenging industrial outlook is partly responsible for this, but many owners shepherded their children into higher education and white-collar jobs, which they see as social advancement and more economically stable.⁴³ But demographics also contribute to company persistence amidst declining profits: many small workshop owners have

³⁸ Kuroda, H. (2002) Shizuoka-ken dezain senta no katsudo tenkai. *Shizuoka Bunka Geijutsu Daigaku kenkyu kiyo* 2, 123-128; Shizuoka Dezain Fukkokai [1996] *Point* 22; Shizuoka-ken Shizuoka Kogyo Gijutsu Senta [1999] *Heisei 10-nendo Shusei kasseika shien jigyo repoto*. Shizuoka-ken Shizuoka Kogyo Gijutsu Senta, Shizuoka; Shizuoka-ken Shizuoka Kogyo Gijutsu Senta [2001] *Heisei 12-nendo Shusei kasseika shien jigyo repoto*. Shizuoka-ken Shizuoka Kogyo Gijutsu Senta, Shizuoka; Sakuragawa, S., Sano, Y., Tanaka, N. (2012) Interview 18 October, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

³⁹ Keizai Sangyo Sho [Ministry of Economy, Trade and Industry] *Kogyo tokei chosa (shichoson-hen)* for 1980, 1990, 2000 and 2005, cited in Kumeno chart 1-2, 18.

⁴⁰ Keizai Sangyo Sho [Ministry of Economy, Trade and Industry] *Kogyo tokei chosa (shichoson-hen)* for 1980 and 2005, cited in Kumeno, H ed. (2010) *Sanchi no henbo to jinteki nettowaku: Asahikawa kagu sanchi no chosen*. Ochanomizu Shobo, Tokyo, Table 1-1, 17.

⁴¹ Keizai Sangyo Sho Daijin Kanbo Chosa Tokei (2014) 'Heisei 24-nen Kogyo Tokei-Hyo 'Kogyo Chiku-Hen, published 25 April 2014, available at <http://www.meti.go.jp/statistics/tyo/kougyo/result-2.html>, last access 26 June 2014. Figures are for 'wood furniture manufacturing (except for lacquerware)' in the 'Shisei Oigawa chiku', the Ministry of Economy, Trade and Industry's designation for Shizuoka City and its immediate suburbs and villages.

⁴² Data for 2012 number of firms and employment is from Keizai Sangyo Sho Daijin Kanbo Chosa Tokei Gurupu (2014) *Heisei 24-nen Kogyo Tokei-Hyo Kogyo Chiku-Hen*, published 25 April 2014, available at <http://www.meti.go.jp/statistics/tyo/kougyo/result-2.html>, last access 26 June 2014; data for 1980 and 2005 is from Keizai Sangyo Sho (1981, 2006) *Kogyo tokei chosa (shichoson-hen)* cited in Kumeno, H ed. (2010) *Sanchi no henbo to jinteki nettowaku: Asahikawa kagu sanchi no chosen*. Ochanomizu Shobo, Tokyo, Table 1-1, 17.

⁴³ Sano, Y. (2012) Interview 12 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

property investments, so can work for minimal income, waiting for retirement rather than reinvesting in company and community.⁴⁴

For continuing firms, market expectation of cheap, contemporary style products, the dreaded ‘fast furniture’ of Nitori and its ilk, provides a substantial challenge. Some firms have chosen to compete through cost reduction themselves, and moved to standardisation, mechanisation and offshore factories of their own.⁴⁵ However, high labour costs and overhead in comparison to other Asian nations and small production volumes make it impossible for micro-workshops to compete on price with imported furniture. Style remains an issue as well: younger consumers particularly prefer brightly-coloured MDF, Ikea-style pine, plain finishes and lightweight honeycomb core imports to Shizuoka’s natural veneers, lacquer, carved decoration and solid wood construction. Anecdotal evidence suggests that importers have also proven adept at producing imitation Shizuoka pieces for the local market: makers complain of launching new pieces only to see knock-offs in import shops weeks later.⁴⁶

Decline in the larger manufacturing ecosystem is an issue as well. In the mid-twentieth century, toolmakers and wood machinery manufacturers concentrated in Shizuoka city and the prefecture’s other heavy industry cities such as Shimizu, enabling regular communication, extreme customisation and quick maintenance. Lower income and expectations that the family firm will fold have meant less capital investment in new machinery, but with the tool and machinery industry hollowed-out as well – replaced with Chinese and other Asian imports at the low end and German imports at the high end – maintenance has become more difficult.⁴⁷ The breakdown of local supply chains contributes to the problem as well, as production moves to China and South-East Asia for lower labour and materials costs and – in a chicken and egg scenario – as links in their own supply chain relocate offshore as well.

Policy shifts at the local, regional and national levels have not always helped Shizuoka furniture. In postwar Japan, industrial research institutes played an important role in sharing national economic recovery with small-scale industrial communities like Shizuoka furniture.⁴⁸ Today, both Shizuoka City and Shizuoka Prefecture retain divisions charged with promoting local light industries, now reclassified as ‘crafts’, but funding emphasises current regional priorities and growth areas such as pharmaceuticals and food science, with reduced backing for furniture-industry support despite enthusiastic staff and a legacy of activities since the 1980s.⁴⁹

In Shizuoka, the civic and prefectural teams continue to try to promote and revitalise the furniture industry, despite decreased budgets, frozen staffing and deprioritisation. The Regional Industry Division of Shizuoka City’s Department of the Economy, Commerce and Industry offers technical workshops, financial and tax advising, linkups with local universities, an attractive and well-stocked shop in Shizuoka’s main train station, a quality assurance programme (the label ‘Shizuoka Brand’) and a large facility with crafts workshop spaces, classes and displays, aimed at tourists, schoolchildren and local amateurs.⁵⁰

⁴⁴ Sano, Y. (2012) Interview 12 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

⁴⁵ Sano, Y. (nd) Shizuoka no kagu sangyo to dezain. Unpublished PowerPoint presentation; Sano, Y. (2012) Interview 12 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

⁴⁶ Ishikawa, T. (2012) Interview 12 December, Kinrin Chokoku Kogei, Shizuoka.

⁴⁷ Amemiya, N. (2012) Interview 29 November, Japan Woodworking Machinery Association, Tokyo.

⁴⁸ Kogyo Gijutsuin Sangyo kogei Shikenjo ed. (1960) *Sangyo Kogei Shikenjo 30-nen Shi*. Kogyo Gijutsuin Sangyo Kogei Shikenjo, Tokyo. Analyses of regional research institutes, not specific to wood furniture manufacturing technology transfer, include: Ruth, K. (2006) Innovation policy for SME in Japan: The case of technology transfer centres. In *Small Firms and Innovation Policy in Japan* ed C. Storz. Routledge, London, 56–81; Shapira, P. (1992) Modernizing small manufacturers in Japan: the role of local public technology centers *Journal of Technology Transfer* (Winter), 40–57; Fukugawa, N. (2008) Evaluating the strategy of local public technology centers in regional innovation systems: evidence from Japan. *Science and Public Policy*, 35(3), 159–170.

⁴⁹ Shizuoka-shi Keizai-kyoku Shoko-bu Chiiki Sangyo-ka (2012) *Shizuoka-shi monozukuri sangyo fukko kihon keikaku*. Shizuoka-shi, Shizuoka.

⁵⁰ Shizuoka-shi Keizai-kyoku Shoko-bu Chiiki Sangyo-ka (nd) *Shizuoka-shi Burando ‘Shizuoka Aoi Puremiumu Ninshohin*

At the Shizuoka (city) branch of the Industrial Research Institute of Shizuoka Prefecture, prefectural reprioritization of strategic industries has left the light industry/crafts division with an uncertain future, despite extensive programming including design workshops and researchers' work in ergonomics, ageing, wood utilisation and well-being (a project to use newly-available postwar Japanese cypress (*sugi*) to improve air quality and stress levels in local schools).⁵¹ In 2010, the prefecture assumed responsibility for the Shizuoka University of Art and Culture, a university founded in 2000 as a joint project of Shizuoka private industry, the prefecture and the city of Hamamatsu to educate designers and provide academia-industry research collaboration. Some policy-makers and designers show optimism that the university will energize Shizuoka furniture through student collaborations and skills training.⁵²

At the national level, the Ministry of Economy, Trade and Industry (METI), METI's Small and Medium Enterprise Agency and the Japan External Trade Relations Organisation (JETRO) aim to help local light industries adapt to contemporary domestic and export markets through product development programmes linking manufacturers with fashionable design firms, mentoring and export promotion schemes like Japan Brand at the Milan Salone.⁵³ Financial incentives, tax and management advice and subsidies for upskilling and apprenticeships from METI and the Ministry of Health, Labour and Welfare (MHLW) provide longer-term structural support.⁵⁴

Research suggests that workshop reaction to the various support mechanisms varies widely. One national scheme that has seen significant take-up by Shizuoka furniture manufacturers is support for apprenticeships, which includes a salary subsidy and, for mid-career entrants, a one-year technical skills training course at a local technical college, organised by the prefecture and supported by the MHLW.⁵⁵ Some – often more successful – firms have taken up MHLW training support and enthusiastically participated in design-led local and JETRO projects, including an exhibition, NIPPON SENSE, at Maison et Objet in Paris, and several rounds of designer-manufacturer collaboration.⁵⁶ Other Shizuoka firms show less interest in product development for changing markets; older owners' apathy and the relatively small size of workshops may also contribute to lack of engagement with support programmes.

Heisei 21-nendo, Heisei 22-nendo, Heisei 23-nendo. Shizuoka-shi, Shizuoka; Zushi, H. (2012) Interview 13 December, Shizuoka City Department of Economy, Commerce and Industry Regional Crafts Division, Shizuoka; Shizuoka-shi (2012) *Shizuoka-shi monozukuri sangyo fukko kihon keikaku.* Shizuoka-shi, Shizuoka; Shizuoka-shi (2013) *Shizuoka-shi monozukuri sangyo fukko kihon keikaku jikyo hokoku.* Shizuoka-shi, Shizuoka.

⁵¹ Sakuragawa, S., Sano, Y., Tanaka, N. (2012) Interview 18 October, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka; Sano, Y. (nd) Shizuoka no kagu sangyo to dezain. Unpublished PowerPoint presentation; Sakuragawa, S. (2004) Koreisha no kiritsu dosaku ni hairyo shita mokusei dainingu setto no kaihatsu. *APAST* 14:7, 91-93; Shizuoka-ken Shizuoka Kogyo Gijutsu Centa Chiiki Sangyo Gijutsu-bu Kogei Gijutsu Sutaffu et al. [2000] *Kagu kara kagu e shinkochu, Heisei 11 nendo shuseki kasseika shien jigyo.* Shizuoka-ken Shizuoka Kogyo Gijutsu Centa Chiiki Sangyo Gijutsu-bu, Shizuoka.

⁵² Tsuchiya, K. (2012) Interview 12 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

⁵³ Kabushiki Gaisha Nihon Sogo Kenkyujo (2008-2010) JAPAN Burando ikusei shien jigyo hyouka nado jigyo hokokusho. http://www.chusho.meti.go.jp/shogyo/chiiki/japan_brand/, last access 24 June 2014. From 2011 onwards, these activities have been consolidated as the 'Cool Japan' campaign. See Ministry of Economy, Trade and Industry (2013) Cool Japan Initiative (Cool Japan Fund). PowerPoint presentation, http://www.meti.go.jp/english/policy/mono_info_service/creative_industries/creative_industries.html, last access 25 February 2014.

⁵⁴ Chusho Kigyo-Cho Kohoshitsu (2013) *Heisei 25 nendo-han chusho kigyo shisaku riyo gaidobukku 2nd* ed. Chusho Kigyo-Cho, Tokyo, accessible at http://www.chusho.meti.go.jp/pamflet/g_book/h25/, last access 24 June 2014.

⁵⁵ Sano, Y. (2012) Interview 12 December 2012, Shizuoka Prefectural Industrial Research Institute. On the MHLW apprenticeship scheme see Chusho Kigyo-Cho Kohoshitsu (2013) *Heisei 25 nendo-han chusho kigyo shisaku riyo gaidobukku 2nd* ed., Chusho Kigyo-Cho, Tokyo, accessible at http://www.chusho.meti.go.jp/pamflet/g_book/h25/, last access 24 June 2014.

⁵⁶ Sano, Y. (nd) Shizuoka no kagu sangyo to dezain. Unpublished PowerPoint presentation; Sano, Y. (2012) Interview 12 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.

5. How to get ahead in furniture: three case studies

Some Shizuoka furniture firms have found effective strategies for thriving in a challenging climate. As the following case studies suggest, a key element in these strategies is adaptability combined with self-awareness: the ability to identify characteristics in production, materials use, customer communication and styling that have historically differentiated the firm from local and larger competitors, and to think flexibly about how those unique characteristics might be reframed and amplified within the new retail environment.

5.1 Niche markets: Interna Nanjoh

Interna Nanjoh continues to make typical Shizuoka products like jewelry boxes but uses product line diversification, own brand production and an emphasis on skill and tradition to weather the market. The company was founded in 1985 as the consolidation of specialised woodworking, carving and finishing workshops into one firm, thus rationalising production under one roof.⁵⁷ Perhaps unsurprisingly, then, it is located in the suburban furniture neighbourhood where firms moved as part of the post-1960s rationalisation drive; consolidation in the 1980s also indicates the lasting impact of the rationalisation policy, combined with Shizuoka furniture's declining fortunes from the 1970s onwards.



Figure 5: Production at Interna Nanjoh Co Ltd, 2012, photograph by Sarah Teasley.

Interna Nanjoh's 28 employees range from senior artisans in their 70s to apprentices in their early 20s. Predominantly mid- and high-range clients include high-end national department stores, mail order 'shopping clubs' and national distributors for department stores and furniture retailers. Products, viewable online, in catalogue and in display space in Shizuoka, are sold through distributors to national department stores and furniture retailers, indicating the continued power of the distribution system.⁵⁸ Interna Nanjoh also provides doors and other wood parts for national prefabricated housing retailers as well as wooden display fixtures for luxury brands like Hermès and OEM for other furniture brands and luxury hotel chains: furnishings, store fixtures and limited-edition promotional packaging like boxes for Suntory whisky.⁵⁹

⁵⁷ Interna Nanjoh Co., Ltd. (nd) Kaisha annai.

⁵⁸ On distributors' power, see Arai, R. (2011) Sengo Nihon ni okeru shuyo mokusei kagu meka no kagu ryutsu no hensen: homu yusu kagu, kontorakuto yusu kagu, yunyu kagu no ryutsu keiro no hensen. *Kyoei Daigaku kenkyu ronshu* 9, 83-107.

⁵⁹ Nanjo, K. (2012) Interview 11 December, Interna Nanjoh, Shizuoka.

In addition to commissions and OEM, Interna Nanjoh manages several in-house brands which together illustrate the firm's corporate strategy. 'Gentle Life by Faro' consists of western-style furniture like cabinets and tables, relatively low-end but still Japanese made. A line of jewelry cases, developed in the 1980s as a user co-design project in collaboration with the prefectural research institute, remain for sale now, their design largely untouched.⁶⁰



Figure 6: Co-designed jewelry cases, Interna Nanjoh Co Ltd, 2012, photograph by Sarah Teasley.

A recent particular success is the brand 'Parisian Variety Shop' (Pari no zakka-ya): everything from small wooden objects (picture frames, hand mirrors, jewelry cases and remote control trays) through to furniture (beds, television cabinets, chests and chairs), unified by what Interna Nanjoh describes as 'European country' style in products and the graphic design of marketing material alike.

⁶⁰ Sano, Y. (nd) Shizuoka no kagu sangyo to dezain. Unpublished PowerPoint presentation; Sano, Y. (2012) Interview 12 December, Shizuoka Prefectural Industrial Research Institute Wood & Crafts Department, Shizuoka.



Figure 7: Pari no zakka-ya products, Interna Nanjoh Co Ltd., 2012, photograph by Sarah Teasley.

According to company literature, the brand identity is ‘Parisian streetscapes as seen in movies – fantasy, memory, nostalgia, lovely’, inspired by ‘the luxury lace once loved by Parisian ladies’.⁶¹ Styling is feminine, with embroidery and lace motifs, and corresponds to the marketing strategy that despite a relatively high price point, female domestic consumers will want the objects and acquire them eventually, after saving up or for a special occasion. Here, the firm’s success indicates a specific feature of the Japanese domestic market: its ageing population. Despite the economic stagnation of the last two decades, consuming spending power remains high, and ageing consumers with tastes fixed decades earlier make up a significant part of the market.⁶² And while existing distribution and retail systems in Japan may offer diminished profits due to their multi-layered structure, Interna Nanjoh’s target consumers are likely willing to pay more for Japanese-made products from familiar outlets.

‘Paris Variety Shop’ products retain many features of twentieth-century Shizuoka furniture, some of which Interna Nanjoh emphasises for marketing purposes. Products are constructed from mid-quality MDF as well as oak, maple, ash and chestnut, but marketing material assures retailers and individual customers that all drawers and legs are hardwood, not MDF or cheap pine. Manufacturing is a combination of hand tools and mechanized production, with NC routers used to trace forms and management uninterested in whether products are predominantly hand or mechanically-made.⁶³ That said, the embodied knowledge and skill of Interna Nanjoh’s employees is a selling point, with an implied suggestion that all woodworking may use mechanization, but the decorative handcarving techniques, tradition of Shizuoka woodworking and skill of Interna Nanjoh’s carvers distinguish its products. Thus Parisian Variety Shop brochures state, ‘The lace treatment that’s essentially the life blood of the Parisian Variety Shop’ series is a rare gem made possible by the hands of consummate artisans’.⁶⁴ The trade catalogue and website emphasise, ‘All wood machining and antique finishes etc.

⁶¹ Interna Nanjoh Co., Ltd (2010) *Pari no zakkaya* Vol. 15.

⁶² On ageing and Japan see Pilling, D. (2014) How Japan stood up to old age. *The Financial Times*, January 17.

⁶³ Nanjo, K. (2012) Interview 11 December, Interna Nanjoh, Shizuoka.

⁶⁴ Interna Nanjoh Co., Ltd (2010) *Pari no zakkaya* Vol. 15.

products are handmade by artisans; this is not mass produced furniture'.⁶⁵ The firm also offers bespoke decoration such as hand-carving and embroidery application.

While its product styling, materials and use of machinery as well as hand tools mean that Interna Nanjoh's furniture is not identifiably 'traditional' or 'heritage', we might argue nonetheless that Interna Nanjoh's organisation embodies many historical Shizuoka furniture characteristics – and that these characteristics simply take the form of practices rather than style. The firm takes advantage of local skills and expertise, and plays an important role – as do many Shizuoka firms – in transmitting skills from ageing artisans to a next generation of makers. It is pragmatic, using resources at hand: machines as well as hand skills, local government support mechanisms, the existing distribution system and the remaining domestic market. At the same time, the firm has been aggressive in developing its own brand – a characteristic of many successful Shizuoka shops today – and product line diversification allows it to access multiple markets.

5.2 Community-building: Kinrin Chokoku Kogei

Kinrin Chokoku Kogei ('Kinrin') was founded in 1969 by a decorative woodcarver, and is now operated by his son and grandson with five employees.⁶⁶ Like Interna Nanjoh, then, the firm represents Shizuoka furniture's shift from extreme specialisation to comprehensive production under one roof, and it too is located outside the historical furniture neighbourhood, on the eastern fringe of Shizuoka city. Unlike Interna Nanjoh, however, Kinrin has sharply shifted the style of its products and sought a new clientele. As decorative woodcarving fell from fashion in the 1990s and middle-class consumers in their 40s and upwards developed as taste for what Japanese marketers refer to as 'lohas' ('lifestyles of health and sustainability') lifestyle goods, the firm reinvented itself as a furniture-maker specialising in natural materials, long-life products and close customer relations. Today, contemporary product styles and new retailing techniques mask a family business deeply invested in the economic and social well-being of Shizuoka's furniture ecosystem and continuing the specific carving skills that have been their – and Shizuoka's – unique selling point.

Kinrin specialises in western-style hardwood tables, chairs and other home furnishings, using both Japanese and imported woods. Some pieces feature a small decorative carving but many are smoothly-finished, blocky pieces, and this use of solid wood rather than veneers on MDF or cheaper wood functions as a key sales point for the company, with transparent, colourless finishes emphasising the wood grain.



Figure 8: Showroom at Kinrin Chokoku Kogei, 2012, photograph by Sarah Teasley.

⁶⁵ Interna Nanjoh Co. Ltd. (nd) Kaisha joho, <http://www.pari-no-zakkaya.com/kaisya.html>, last access 10 November 2013.

⁶⁶ Kinrin Chokoku Kogei (nd) Mainichi kaguya.

As the earthy style may suggest, Kinrin targets middle-class customers in their 30s and upwards with a taste for the artisanal, the ‘natural’, the ‘real’, an interest in bespoke furniture created through a dialogue with the makers and a preference for investing in high quality products that use for life over the cheap, disposable furniture they may have owned in their 20s. The past decade has also seen increased market interest in rediscovering a ‘Japanese’ aesthetic: simplicity and nature are often presented (sometimes overly simplistically) as an antidote and contrast to westernised contemporary urban life.⁶⁷ Or as founder’s grandson Ishikawa Tomonori phrases it in the company’s promotional material,

‘There’s nothing wrong with a lifestyle that’s all about speed, kitted out with furniture bought entirely online or through mail order. But there’s another lifestyle that’s about going to a small furniture shop and slowly picking out what you want, as you inhale the wood scent and enjoy the feel of the wood grain.

‘I’d like you to stand still for a moment and consider something. Are you rushing too much? Aren’t you tired? What is it that you really want? Sit down for a moment in a wooden chair, and feel the material’s warmth. Or on a sofa that gently gathers you into its folds. Our furniture company is always waiting, ready for you with furniture like this’.⁶⁸

Kinrin’s product and graphic designs, shop interiors and sales methods convey this philosophy-cum-sales strategy clearly. Customers can view samples online and order by telephone, but are encouraged to visit the showroom attached to Kinrin’s small factory in Shizuoka’s mountainous outskirts, where Ishikawa will sketch them a bespoke piece and offer a quote onsite.



Figure 9: Ishikawa Tomoharu at his desk, Kinrin Chokoku Kogei, 2012, photograph by Sarah Teasley.

Personal interaction offers a strong contrast to box stores and online purchasing, and allows Ishikawa’s self-presentation as a member of the next generation who has actively, decisively chosen to continue the local tradition of making real things from natural materials, through storied artisanal methods.

⁶⁷ See for example the success of women’s style magazine *Waraku*, or the popularity of the 2012 exhibition ‘Tema Hima: The Art of Living in Tohoku’ at Tokyo design museum 21_21 Design Sight, Tema Hima: The Art of Living in Tohoku. 21_21 Design Sight, Tokyo Japan. <http://www.2121designsight.jp/program/temahima/>, last access 7 May 2014.

⁶⁸ Kinrin Chokoku Kogei (nd) Mainichi kaguya.

Promotional material often takes a personal voice, creating a story that connects Ishikawa and Kinrin to the consumer. One catalogue consists largely of a first-person reflection by Ishikawa on his philosophy of making, and closes with a ‘handwritten’ note. In the essay, Ishikawa voices the image of the quiet artisan: ‘Wood and furniture are both so honest that it makes your heart ache. That’s why you have to engage them day in day out, honestly and straightforwardly’.⁶⁹ The tone and ideas alike recall both folk craft (*mingei*) writings and Buddhist teachings on the importance of having a pure heart and childlike outlook, at a time when both folk craft and Buddhist philosophy are enjoying a popular resurgence in Japan.⁷⁰

Kinrin’s approach stands out amidst the more conservative styling and continued engagement with twentieth-century distribution networks and sales mechanisms of some other Shizuoka firms. Regardless, by taking existing resources – embodied skill, a family legacy and tradition of furniture-making, existing machinery, Shizuoka’s convenient location and the city’s remaining ecosystem – and matching them with contemporary market conditions and technologies — the Internet, current consumer taste and apprentice interest – Kinrin has much in common with the Shizuoka lacquerware makers who developed the mirror stand industry, and demonstrate the power and importance of recognising translational characteristics that may – even more than style or method – provide specific power for local industry against competitors.

5.3 Pragmatic tradition: Fukui Mokkojo

Fukui Mokkojo (Fukui Woodworking) is a high-end Japanese-style chest (*tansu*) maker founded in 1950.⁷¹ In 1963, the workshop began making western-style sideboards as well. Today, the founder’s son, grandson and a handful of employees produce a variety of Japanese and western-style chests and cabinets, primarily for sale in high-end department stores nationwide.⁷²

Today, Japanese-style chests and western-style furniture made with Japanese carpentry techniques and tools are a niche luxury market rather than ordinary, everyday furniture. For Fukui Mokkojo as for many small European luxury producers as well, however, reduction to a niche market product has benefits as well as challenges. In sum, the continuing if reduced demand for traditionally handmade, high-quality pieces by now-historic workshops and the firm’s relatively low overhead allow it to continue working with decidedly non-rationalised methods, and at low volume.

Fukui Mokkojo uses Japanese timber, which they dry naturally themselves in the lot adjacent to the small, corrugated-iron workshop in the old furniture neighbourhood in central Shizuoka.

As in earlier Shizuoka furniture production, all pieces are finished in natural lacquer, a process brought in-house in 1998. Carpenters work seated on *tatami* flooring, holding the pieces in place with their legs as they carve freehand using now-antique tools and techniques.

⁶⁹Kinrin Chokoku Kogei (nd) Mainichi kaguya.

⁷⁰ On Mingei, see Brandt, K. (2007) *Kingdom of Beauty: Mingei and the Politics of Folk Art in Imperial Japan*. Duke University Press, Durham.

⁷¹ Fukui Mokkojo website (nd) <http://www.fukuken-kagu.com>, last access 10 November 2013.

⁷² Fukui, H. (2012) Interview 12 December, Fukui Mokkojo, Shizuoka.



Figure 10: Fukui Hideyuki in the workshop area at Fukui Mokkojo, 2012, photograph by Sarah Teasley.

Like Interna Nanjoh, the retention of hand methods and old machinery is less about fetishisation of the hand or marketing strategy, and more about available skills and a business model that allows slow production: old techniques and handwork are used alongside machines, and new materials such as American wood bond substitute for traditional *nikawa* animal hide glue when makers deem them to be more effective.



Figure 11 Tools, machines and American wood bond at Fukui Mokkojo, 2012, photograph by Sarah Teasley

Similarly, in addition to the national distribution system Fukui Mokkojo maintains its own website, Facebook page and blog, written by the founder's granddaughter. In addition to presenting the firm's product range, social media locates the firm within a narrative of craft-based, family-run local production, a marked contrast both to Nitori-style big box retail and to the persistent image of Japanese-style chests as elite, expensive goods distant from ordinary consumers, created through the chests' high price and presence at high-end department stores.

5.4 How to get ahead in furniture: pragmatism as heritage

All three firms take pride in their industrial heritage, local skills and Shizuoka furniture's reputation now as a domestic historical furniture region, in contrast to imports. Heritage provides the firms with marketing material and differentiation amongst competitors, but its presence lies deeper and often outside visual style: in attributes such as Kinrin's desire to contribute to the community and Fukui's tiny size and 'we get by' attitude. But the three firms have also developed niche markets too small for

attention from big box shops and imports such as Nitori, and by operating at smaller scale, offering bespoke products and forming lasting customer relationships have found market viability in an extremely challenging environment. In all three cases, these shifts in strategy can also be seen as pragmatic reinventions of existing practices within the firms and in the Shizuoka furniture manufacturing community more generally. And reviewing the Shizuoka furniture industry's history over the past 150 years reveals pragmatic adaptability – to new consumer tastes, markets and lifestyles – as key to Shizuoka furniture's success (and the lack of adaptability a major element in its post-1970s failure). Adaptability, it seems, can be a heritage attribute as well as an important business skill.

6. Conclusion

The Shizuoka furniture industry's long-term viability is important for owners, employees and their immediate community, but does it really matter for Shizuoka as a whole? The prefecture and city remain Japanese industrial hubs with strengths in areas including biotechnology, motorcycles and pianos, and contribute 3% of Japanese GDP.⁷³ However, furniture is a small proportion of this figure, accounting for 3.7% of Shizuoka's manufacturing firms in 2012.⁷⁴ As some workshops choose closure over revitalisation, perhaps Shizuoka furniture is yet another example of a once-strong local industry that will continue as a few energetic, visionary firms rather than entire neighbourhoods.

But the disappearance of local industry means hollowing out of the community as well. The Shizuoka furniture industry's current GDP contribution and number of firms represent neither the size of the community in terms of family, residual skills nor the hole left by the decline of the full ecosystem around Shizuoka furniture: veneer-makers, machine tool makers and the impact of their disappearance on furniture manufacturing elsewhere in Japan.

Shizuoka furniture does matter, and Shizuoka furniture- and policy-makers alike could learn much from communicating experiences and ideas with counterparts in regions such as Brianza, Monza and the Veneto in northern Italy. Areas for particular discussion might include: smart local government support for furniture; skills and training, from primary school to mid-career apprenticeships; academia-industry linkages; using social networks to revitalise industry associations; closer links with forestry and wood utilisation decision-makers; and how furniture-makers might take advantage of changing forestry technologies and policies. Unlike some European furniture regions, for furniture industries like Shizuoka's the domestic market remains the main source of demand and is likely to stay this way, despite government promotion of exports. Regardless, local furniture industries are not only rocked by global waves, but in their myriad strategies for flourishing within them have potential global applications.

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⁷³ Japan External Trade Organisation (JETRO) (2013) Investing in Japan Regional Information: Shizuoka, <http://www.jetro.go.jp/en/invest/region/shizuoka/>, last access 8 November 2013.

⁷⁴ Keizai Sangyo Sho Daijin Kanbo Chosa Tokei (2014) Heisei 24-nen Kogyo Tokei-Hyo 'Kogyo Chiku-Hen, published 25 April 2014, available at <http://www.meti.go.jp/statistics/tyo/kougyo/result-2.html>, last access 26 June 2014.

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