

The Development of Distribution Systems in Japan before World War II

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Introduction

In the study of marketing in Japan, traditional distribution systems before World War II have been contrasted with those developed during the period of rapid economic growth after the war. In most cases traditional distribution systems meant systems which remained from the Edo Period (1603-1868). Therefore, traditional systems of the Edo period have been contrasted with innovative systems of the post World War II period [22,30]. This can be explained by the fact that many studies of distribution activities in the Edo Period exist and there has been a great deal of interest in the study of marketing activities after the war. However, there are few studies of the development of distribution systems in the period between the Meiji Restoration (1868) and World War II [15, 16, 31].

After the Meiji Restoration, particularly from the end of the Taisho Period (1912-1925) and the beginning of the Showa Period (1926-1989), there were many social changes in Japan, including rapid industrialization, urbanization, the rise of mass production systems, and the rise of the middle class. By this time various types of Western products had gradually penetrated into the daily life of Japanese people [12]. It was not uncommon to find Japanese people wearing western clothing, eating western confectionery, and drinking beer and whiskey. As a result a dual structure of consumption appeared: traditional and modern (Western)-- a structure uncommon in Western countries.

There were other factors which contributed to the changing market structure. Population in Japan about doubled from 1870 to 1930, and consumption expenditure increased continuously (except during the depression years). It increased by an annual average of 2.52% from 1874 to 1940. Urbanization also occurred. The ratio of people who lived in cities with more than 10,000 people increased from 11% in 1867 to 32% by 1932. The number of cities with a population from 10,000 to 50,000 increased from 196 in 1881 to 537 in 1920. Cities with more than 50,000 but less than 100,000 increased from 12 to 31 in the same period. Particularly big cities with more than 100,000 had increased from 6 to 16 [18, 19, 23]. The growing concentration of population and the increase of income in the cities created a mass market. At the same time urban people were developing new life styles. Rural markets, which were relatively poor, nevertheless developed into a big market for traditional products like clothing, soybean paste, and soy sauce, which previously had been produced in the home. Because of these changes the life style of Japanese consumers and the structure of the Japanese market also

began to change. As a result Japanese manufacturers of consumer goods had both opportunities and problems in marketing their products. They adjusted to the changing environment by developing new distribution systems and marketing techniques.

The objective of this paper is to explain how and why the distribution systems between the Meiji Restoration and World War II changed, focusing on the marketing activities of manufacturers. It is said that the distribution system of a product is created by the relationship among the constituents who perform the marketing functions: manufacturers, middlemen, retailers, and sometimes consumers. The relationship among these constituents can be shown in the degree of integration and the span of the marketing functions each performs, that is, the degree of the vertical integration of the marketing functions [26]. This in turn can be determined by the nature of markets and products, the industrial structure, transportation costs, and social factors such as the tax system and laws.

Before the Meiji Restoration the distribution systems for traditional consumer goods had been well established. Therefore, it might be possible to explain the changing distribution systems between the Meiji Restoration and World War II by analyzing why and how urbanization, the beginning of mass production systems, and the changing life style of Japanese consumers influenced the existing distribution systems. In order to explain this, we develop four categories based upon the nature of products [10,28]:

1. Traditional-Differentiated
2. Traditional-Undifferentiated
3. Untraditional-Differentiated
4. Untraditional-Undifferentiated

Traditional products are those which existed before Japan started industrialization such as kimonos, ceramics, *sensu*, sake, and soy sauce. Untraditional products are those which were introduced after the Meiji restoration, such as chocolate, whisky, beer, cosmetics, soap, etc. Differentiated products are those defined by advertising and brand name.

The Existence of the Traditional Systems

Most traditional products continued to be distributed in customary ways throughout the period, although some companies began to innovate and create new systems. In these distribution systems wholesalers played an important role.

Products in the traditional-differentiated category were produced in certain limited areas because of specific material needs and special skills of craftsmen. It was not necessary to advertise; they were not mass-produced, and the quality of products were spread by word of mouth.

One traditional-differentiated product distributed over the nation in the Edo Period was ceramics. The feudal lord of the Nabeshim-clan was the first to build a warehouse in Osaka to sell local ceramics. Ceramics were shipped from the town of Imari (in Kyushu) to Osaka. Osaka merchants then handled the Imari-jaki (ceramics), and paid *einokin* (a tax) to the feudal lord. When the product arrived at the warehouse in Osaka, middlemen were invited

to buy the ceramics by bidding. The middlemen then sold to retailers and wealthy families in the area Senba (still a well-known wholesaler area in Osaka). As a result, Tajimi-yaki, Awaji-yaki, and other ceramics had begun to be handled through Osaka some three hundred years ago. Because guilds existed until the beginning of the Meiji Period, products from particular areas were handled by particular wholesalers. For example, Kaiyasu handled products from Owari, and Tsujiso handled products from Awaji. It is said that the wholesalers handling ceramics in Osaka numbered about 140 or 150 by 1680 and that they controlled the producers and expanded sales outlets as transportation systems developed and demand grew [2]. Even after the Meiji Restoration these wholesalers played an important role because of their accumulated capital and marketing techniques. After the war, however, their power decreased drastically. For example, the number of employees at Tsujiso decreased from more than 600 before the war to less than ten after the war.

Among producers of traditional-undifferentiated products, such as sake and soy sauce, there appeared some who shipped their products directly to Edo. For example, in 1747 Harubei Zaimokuya (later founder of the Hakutsuru Sake Brewing Company under the Kano Family name), in Nada of Kobe, started selling sake to the Edo market. In the distribution of these types of products wholesalers had leadership. For example, sake was shipped from the Kansai brewers directly to wholesalers in Edo by consignment, and wholesalers in turn sold sake to middlemen with a commission of 5% or 6%. Thus a distribution system composed of brewers, shippers, Edo wholesalers, sake middlemen, and retailers developed. In 1694 there were 126 wholesalers and 42 middlemen between wholesalers and retailers, but the number of wholesalers decreased to 38 by 1809 because of competition. Sake wholesalers in Edo also handled soy sauce.

Sake and soy sauce brewers and shippers relied heavily upon wholesalers to market their products to retailers. The product was shipped to wholesalers without set prices, and brewers did not learn of the sales results until designated settlement times each year. In order to avoid the abuse of wholesalers' power, brewers sold to various wholesalers. For example, the Kano Family, brewer of the Hakutsuru brand of sake, had business with eight competing wholesalers.

After the Meiji Restoration some companies in the brewing industry developed the national market. In 1885 the Japanese government issued a trade mark law, and the Kano Family began aggressively advertising its Hakutsuru brand in newspapers. The Gekkeikan Company, which was established by Rokuroemon Okura in 1637, grew from a local brewer in Fushimi of Kyoto to a national brewer after the Meiji Restoration. Around 1883 Gekkeikan began shipping its product to Tokyo and developing markets outside of Fushimi. The completion of the Tokaido Line (between Tokyo and Kobe) in 1889 and the development of bottling helped to support Gekkeikan's strategy in developing the national market [3,4].

The Noda Soy Sauce Brewing company, which was established through the merger of various soy sauce brewers in Noda of Chiba, also began aggressive advertising after World War I in order to create demand. By the

Showa Period Noda Soy Sauce had become well known throughout the country [21]. In this way, brand names of some manufacturers of sake and soy sauce became national ones before World War II; however, they could not change the traditional distribution systems. In 1931 there were 8,481 sake brewers in Japan. Because the process of production of these traditional-undifferentiated products was fairly simple, and because they could use materials from anywhere, there were many small-scale brewers all over the nation. It remained this way until after World War II when the process of brewing sake was scientifically analyzed and, through mass production, sake was able to be produced year-round. The distribution system of traditional-undifferentiated products basically did not change before World War II.

Some manufacturers of traditional products, however, introduced innovations into their production and marketing systems and changed the nature of their products from traditional-undifferentiated to traditional-differentiated by changing the product concept. These manufacturers found that because of the development of mass production systems and the increase of demand, existing distribution systems did not meet changing consumer needs. As a result, new distribution systems replaced old distribution systems. One of the most typical cases was the Fukusuke Company in the tabi (traditional Japanese footwear) industry.

Tsujimoto Fukumatsu established the Fukusuke Tabi company in 1885. At the time there were two types of distribution system for tabi. In one wholesalers played an important role, and manufacturers produced tabi according to specifications proposed by wholesalers. These products were sold under wholesalers' brands. In the other case small-scale manufacturers designed and produced tabi themselves and sold them from the corner of their shops. Fukusuke however had the policy "Do Business By Volume", and introduced a mass production system in order to sell products more competitively. Tabi traditionally were hand-made, but Fukusuke modified imported German sewing machines to produce tabi. In 1896 Fukusuke started sewing with machines and by 1899 it established a factory system. By 1923 it had established a belt conveyor system. At the same time, it changed the concept of the a good from one which protected against cold weather to an item of fashion. Consumers who had previously worn tabi only in cold months began wearing tabi throughout the year.

As a result of the development of mass production and increased demand, Fukusuke decided to enter the national market. The price and quality of products produced by machinery were competitive with local tabi manufacturers and sellers throughout the nation. Fukusuke advertised the quality and low price of tabi produced by machine and packaged each product for consumers to buy easily.

Fukusuke in the beginning used the existing distribution system. Information from wholesalers about retailers was very important at the time when the transportation and communication systems and credit reporting companies had not yet developed. Fukusuke developed another policy, "At Least One Retail Store In Every City Or Town," and chose one powerful wholesaler in each district as its agent. By 1921 Fukusuke had established

branch and representative offices to sell its products to 60,000 retailers through 600 agents.

In the Showa Period Fukusuke organized a sales network by establishing the Tofukukai, an organization composed of its retailers and agents. However, this system did not work well for Fukusuke. It was confronted with problems of discount sales and of agents competing for customers outside their own territory. Fukusuke tried to solve these problems by reorganizing Tofukukai, but interests among sales agents clashed and it was difficult for them to reach agreements. In order to bring more unity to the sales organization, Fukusuke established sales companies. These sales companies replaced the sales agents' wholesaling activities. In the establishment of these companies it was not Fukusuke but the wholesalers which provided the capital. This system also did not work well. Therefore around 1931 Fukusuke put the sales companies under the control of sale offices in each area. As a result wholesale functions became completely integrated within the organization of Fukusuke. Fukusuke later developed the Fukusukerenmei (Fukusuke Association) in order to integrate the sales activities of retailers [7].

Among manufacturers of the traditional products, some companies began to develop markets outside Japan by changing the concept of their products. The Nippon Toki Company was one of these. It was established in 1905 by executives of the Morimura company (one of the oldest trading companies in Japan) to produce and export chinaware. Executives of Morimura wanted to export Japanese chinaware but found that they could not export the Japanese product to Western markets because of its low quality and poor design. They therefore introduced Western technology, machinery, and design to produce the product. In 1908 Nippon Toki officially changed its company objective to read "To manufacture and sell Western style chinaware to the domestic market". In 1909 it created a sales department and sold its products directly to department stores, hotels, restaurants, and to the Japanese Navy [20].

Changes in the Distribution Systems of Untraditional Products

It was not common for manufacturers to control the distribution of traditional products such as Fukusuke did before World War II. The control of distribution by manufacturers was more obvious in untraditional-undifferentiated products. Products in this category were mainly imports from advanced Western countries. There were some exceptions, however, such as the Suzuki Ajinomoto Company, which developed its original seasoning in Japan [1].

As industrialization and urbanization in Japan developed, the westernization of the Japanese life style progressed and demand for Western products increased. Japanese entrepreneurs who noticed the increase wanted to replace imports with domestic production. Therefore entrepreneurs who had been exposed to Western cultures began to introduce basic manufacturing technologies directly from foreign countries and to develop western methods of marketing.

Some companies introduced American production and sales systems. For example, the House of Murai copied the systems of the American Tobacco Company [5]. However, most manufactures in this category had to modify or change their products, production, and sales systems in order to adapt to the Japanese environment.

A typical example was Morinaga and Company, which had been producing confectionery since the Meiji Period. In 1898 Morinaga was established by Taichiro Morinaga, who had studied production methods in the United States. Morinaga began manufacturing Western confectionery (marshmallows, caramel, and chocolates) in Japan. However Morinaga faced many problems in the humid Japanese environment. In the beginning it sold products directly to "Western Liquor And Miscellaneous Shops" and to confectionery shops in the city of Tokyo.

Demand for Western confectionery increased gradually. As the number of customers in Tokyo and Osaka increased, Morinaga concentrated on production and began using existing wholesalers for distribution. By 1906 it used about 250 wholesalers in the Osaka, Tokyo, Kyushu, and Sanyo districts. However, wholesalers competed for customers and invaded others' territories. Therefore, in order to secure common profits, Morinaga organized "sole" and "semi-sole" agents into the organization of Koshinkai and Seiwakai respectively. However, member wholesalers of the Koshinkai indicated their intention to handle products of the Tokyo Kashi Kaisha (The Tokyo Confectionery Company, later The Meiji Confectionery Company) which was organized by powerful leaders in the business world. Conflicts between Morinaga and members of Koshinkai ensued. Since members of the Koshinkai thought the Tokyo Confectionery Company would suppress Morinaga, they left Morinaga. As a result, Morinaga sent its own employees to local cities and began direct transactions with local wholesalers. It also opened sales offices through existing merchants.

Morinaga constructed a modern factory in 1925 and developed continuous production systems. He said, "In order to complete this business it is necessary to develop close communication among manufacturing, selling, and advertising, and coordinate these activities well." To accomplish this Morinaga tried to establish its own sales organization. However, because Morinaga did not have enough capital and personnel, and because it would cause conflict with existing wholesalers, Morinaga began establishing sales companies all over the nation through joint ventures with wholesalers with which it had already developed good relationships. Morinaga provided less than ten percent of the capital, and the joint venture executives came from the wholesalers. Representatives from both Morinaga and the wholesalers jointly developed sales policies.

In 1923 after Hanzaburo Matsuzaki, co-founder of Morinaga, studied the chain store system which had developed in the United States, Morinaga opened a candy store chain to demonstrate products which were new to the Japanese. In the mid 1920s independent retailers began suffering from competition caused by the development of department stores and chain stores in Japan. Therefore, in 1928 Morinaga organized a group of existing independent retailers in order to strengthen their competitive power [17].

The trend for manufacturers to play a more important role in distribution systems became obvious in the depression from the end of the Taisho Period to the beginning of the Showa Period. The rise of mass production systems coupled with products now able to be distributed nationally (i.e. technically complex and perishable products) led to changes in distribution systems. Particularly after the Big Kanto Earthquake in 1923, because credit reporting organizations, transportation, and communication developed rapidly, some changes in the role of wholesalers appeared. In addition, competition became very keen between established and new wholesalers, among retailers, and among manufactures. Manufactures developed special sales to wholesalers as a means of price competition [13, pp. 601, 728].

Price competition similarly developed in untraditional-undifferentiated product industries. In oligopolistic industries such as beer production, sales agreements worked well to prevent cut-throat competition. Product was sold from brewers to retailers through wholesalers in the food industry, and wholesalers received a commission from brewers. Beginning with the depression in 1920 brewers found themselves facing price competition. In 1923 Dai-Nippon Beer, Nippon Beer and Mineral Water, and the Kirin Beer companies made an agreement to maintain prices. Retailers, wholesalers, and brewers also made agreements on retail and wholesale prices. In 1930 Nippon Beer and Mineral Water withdrew from these agreements and cut-throat competition ensued [27]. As a result, Dai-Nippon Beer in 1932 proposed a merger of Dai-Nippon, Kirin, and Nippon Beer and Mineral Water. In 1933 Dai-Nippon merged with Nippon Beer and Mineral Water. Kirin Beer refused to merge but instead reached an agreement with Dai-Nippon to establish a joint sales company to sell their products jointly for five years. In 1934 the beer industry was recognized as an "important industry" under the Important Industries Control Act, which was enacted to prevent problems caused by monopolies. Thus the beer industry came under government control. Manufacturers of paper and sugar followed in the path of brewers [32, 33].

In the soap, toothpaste, and cosmetic industries, it was difficult for manufacturers to reach price agreements. As a result, manufacturers tried to control the distribution systems composed of wholesalers and retailers. For example, the Shiseido Company established a sales organization in order to avoid competition, to develop mutual prosperity, and to develop co-existence among retailers. After its president, Noboru Matsumoto, visited the United States in 1923, he introduced the chain store system to Shiseido. It first organized retailers, which handled only Shiseido brand cosmetic products. It also went into the operation of beauty salons in order to support retailers by demonstrating its cosmetics. At the wholesale level Shiseido established a dealer contract system. Wholesalers were required to sell products to only "Shiseido Chain Stores" at established prices in order to avoid cut-throat competition, to develop co-existence and mutual prosperity, and to establish an orderly transaction system. In 1927 Shiseido thought it would be good for itself and its retailers to develop wholesale organizations which would handle only Shiseido products, and in this way it integrated its marketing activities.

Thus, its wholesalers became sole agents and eventually grew into sales companies located throughout the nation [11].

The same type of changes took place in the distribution of other untraditional-undifferentiated products, where wholesalers traditionally played an important role in coordinating supply and demand. These changes could be seen particularly in the role of local wholesalers, who became integrated into distribution *keiretsu* (or group of companies each of which performs the distribution role in the process) [25]. In the soap industry, in addition to competition among manufacturers, price competition among wholesalers and retailers developed. The Kao Company (like others in the industry) organized its wholesalers and retailers in order to avoid such price competition. When it sold New Kao Soap in 1936 Kao made an agreement with wholesalers on the abolition of discount sales in order to control pricing to retailers. In 1927 the Lion Toothpaste Company organized wholesalers in order to maintain prices and integrated its wholesalers into *keiretsu* by establishing the Lion Group [14]. In this way manufacturers of famous brands could control wholesalers and retailers. In the distribution of non-famous brands of soap, wholesalers still played an important role [24].

There were few untraditional-differentiated products (consumer durables such as sewing machines, record players, and electric fans) before World War II. The marketing of consumer durables was not fully developed until the rapid economic growth in the late 1950s.

The Janome Sewing Machine Company was one of the few pioneers in the marketing of consumers durables before World War II. The history of Janome began when Yosaku Ose and others established Pine Sewing Machine Works in 1921. At that time, the Japanese market was controlled by Singer Sewing Machines because Singer had developed very aggressive marketing activities, including establishing its own retailers, sewing schools, and an installment plan.

Ose made a purely Japanese-made home sewing machine and in 1929 reorganized Pine Sewing Machine Works into Pine Sewing Machine Company. He discovered that it was possible to mass produce his machine. He still had to develop innovative marketing activities to compete with powerful Singer.

After studying the marketing system of Singer, he found that selling sewing machines required the integration of manufacturing and marketing because of the nature of the product. Ose thought it was necessary to create a mass market, something which Singer (which sold its products to high-income families) had not yet developed. In order to sell his products Ose created a "monthly save - monthly payment" plan. In this system customers paid a certain amount of money every month until the machine was paid off, which was useful in creating a mass market.

Singer started an installment plan in Japan as early as 1907, but it was not fully developed until around 1929 or 1930. American-type installment plans were introduced through sales of pianos and organs, gramophones, watches, and cash registers. Prices on the installment plan usually were about twenty percent more than the cash price.

Pine tested this sales system in Tokyo in 1930 and introduced it nationally in 1935. In the same year it established a new factory in Nakano

(Tokyo) for its sewing machine business and in this way integrated its manufacturing and marketing functions. At the same time, with the objective of developing a market for Western-style sewing and sewing machines, Pine opened the Japan Western Sewing School. It also opened its own retail stores, through which it demonstrated how to use sewing machines. Pine increased and developed its sales force and quickly increased the number of its retail stores from 7 in 1935 to 53 in 1938. In 1935 Pine changed its name to Teikoku Sewing Machine Company and began using the brand "Janome" for its sewing machines [6].

In 1939 the Tokyo Electric Company, a producer of small electric appliances, merged with the Shibaura Works Company, a producer mainly of heavy electric equipment and machinery, to establish the Tokyo Shibaura Electric Company (today's Toshiba Company). Tokyo Electric had begun manufacturing and selling tungsten light bulbs in 1913. It had established a sales department with both a selling and an advertising division. It had sent two employees to the United States to study General Electric's sales system. In addition, under the leadership of Kichio Shinsho, the Sales Manager, it had developed a campaign to publicize the use of tungsten light bulbs and to educate consumers about lighting. Tokyo Electric invited R. P. Parrot of General Electric to Japan to educate its salesmen on the use of these new electric bulbs and on sales techniques. Parrot contributed to the innovation of Tokyo Electric's marketing activities. After 1914 Tokyo Electric organized a nation-wide sales network with representative offices. In 1916 it penetrated into the continent of China, establishing representative offices in Shanghai and Dairen.

Tokyo Electric also began production of home electric appliances such as fans, irons, refrigerators, washing machines, and vacuum cleaners because it wanted to increase the consumption of electricity. In 1927 it made agreements with General Electric and Shibaura on the sales of home electric appliances. In addition it established the Electric Finance Company, through which it developed an installment plan.

In the beginning of the Showa Period Tokyo Electric sold its products mainly to large customers (such as government organizations) rather than to individual customers. However, in 1930 it began selling Blue Box Mazda Lamps to electric light companies and Red Box Mazda Lamps to consumers. In 1938 it divided the nation into ten districts and established the Mazda Sales Company to sell products to retailers. Tokyo Electric decided to set up authorized dealers in Tokyo, Yokohama, Shizuoka, Nagoya, Kyoto, Aomori, Beppu, and Osaka. These authorized dealers later were organized into The Tokyo Mazda Sales Company, along with other sales companies in each respective district [29].

Conclusion

After the Meiji Restoration, industrialization and urbanization created markets for consumer goods in Japan. Western goods and production systems were introduced into Japan through this process. As a result, both Western and traditional goods often existed in the same industry. The Japanese, for

example, began drinking beer and whisky as well as traditional sake. They also ate Western confectioneries (marshmallows, caramels, and chocolates) along with traditional Japanese confectioneries ("yokan" and "senbi"). They wore Western clothing with their traditional tabi. Because of this dual structure of consumption, rather unique Japanese distribution systems developed before the war.

Entrepreneurs who started production of Western consumer goods to develop this new mass market were able to establish bigger companies than those in traditional industries because they introduced Western (mostly American) mass production and mass marketing systems and modified these to adjust to the Japanese market. (Sometimes traditional products were completely replaced by the mass produced goods as in the case of sugar, flour, and paper.) In this way many changes were introduced into the traditional Japanese marketing system. Generally, the first movers maintained a position of leadership, and even today remain so: Shiseido in the cosmetic industry, Kao in the soap industry, Santory in the liquor industry, Dai-Nippon and Kirin in the brewing industry, and Janome in the sewing machine industry.

Although these companies eventually reorganized their distribution systems, they started selling their product through existing systems, which they quickly realized were inefficient. Because they developed mass production through large-scale modern factories, they had to develop mass sales systems as well. The integration of the flow of products and information was different from that developed in the United States. Most Japanese companies reorganized existing wholesaling systems for the same type of products into sales company systems. By establishing sales companies with existing wholesalers, manufacturers did not need to raise capital. Usually, wholesalers provided capital and personnel. Of course, there were many conflicts between manufacturers and existing wholesalers. However, the quality and price of mass-produced goods, as well as aggressive advertising, gave manufacturers power to control wholesalers. Manufacturers sent a few employees to sales companies to integrate and coordinate the activities of both manufacturers and wholesalers. As a result, although sales companies were independent legally and financially, they were under the control of manufacturers, which created distribution *keiretsu*.

In some cases manufacturers of untraditional products had to develop retail stores: Morinaga opened candy stores and Shiseido opened beauty salons. Although these products were traditional in Western markets, in Japan it was necessary to demonstrate such new products to the consumer in order to increase and stabilize sales.

In the distribution of traditional products, the existing distribution systems of the Edo Period remained at least until the war broke out. Manufacturers produced traditional products by traditional production systems and marketed them in local markets. They did not develop mass production and mass marketing systems. As a result, manufacturers of traditional products remained small and local, although there were some exceptions. For example, when Fukusuke introduced a mass production system for tabi, it had to develop new distribution and marketing systems. In the new systems the relationship between manufacturers and wholesalers resembled the system

used for untraditional-undifferentiated products. In addition there were some manufacturers of brands such as Hakutsuru and Gekkeikan Sake, and Kikkoman Soy Sauce, which developed aggressive advertising and marketing activities to sell their products in the national market. They became rather large companies, but basically could not change the existing distribution systems. Although these manufacturers gained comparatively strong power over wholesalers (because of their established brand names), wholesalers still played an important role in the distribution of these products. It was not until the time of the "distribution revolution" in the 1960s, when supermarkets developed, that changes occurred in the distribution of these traditional industries.

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