

Summary

This study discusses the origins, development, current state, and challenges of the musical instrument industry in the Hamamatsu area, which has developed as one of the greatest industrial clusters of Japan. As it has a long history of manufacturing dating back to the Edo Period and numerous artisans such as woodworkers as well as high-quality lumber as a raw material for musical instruments, the Hamamatsu area has developed clusters of the musical instrument industry. We also highlight the presence of talented inventors and local capitalists who understand and support them. However, the offshoring of production facilities has caused a decline in the sales of electronic musical instruments, lowering the value of musical instrument exports since 1991. Although the domestic market environment for the musical instrument industry remains challenging due to a decrease in needs caused by declining birth rates, sales growth is observed due to business efforts in the international market, particularly in developing countries. Musical instrument manufacturers in Japan must develop strategies and market their products in developing countries experiencing rapid growth, not just in the United States and China, the world's largest music markets.

Keywords : Musical instrument industry, Hamamatsu, Cluster, Piano, Marketing strategy

1. Introduction

Hamamatsu Town was reorganized as Hamamatsu City in 1911. As of December 1, 2021, the city had a population of 796,328 (including 25,104 foreign residents),¹ ranking it fifteenth among Japanese cities except Tokyo. Furthermore, it has a land area of 1,558.04 km² (reference value), making it the second-largest city by area in Japan after Takayama City (2,177.67 km²), Gifu Prefecture.²

Western Shizuoka has a cluster of musical instrument industries, and Hamamatsu, its center, in particular, is known as the “city of musical instruments.” The musical instrument industry and the vehicle industry have a significant presence in this city (motorcycle and automobile). One of the

major factors is that the area has traditionally been a manufacturing center since the Edo Period, creating the most advanced industrial branches in each period of its history. In the Edo Period, the cotton fabric industry was advanced, while in the Meiji Era, it was a crucial manufacturing center of cotton fabrics and weaving machines.

Tracing the formation records and development of the modern industry since the Meiji Era in the Hamamatsu area, it is clear how the area incorporated the global industrial revolutions and created growth sectors in a chain reaction. The Hamamatsu area developed after World War II— particularly during rapid economic growth— focusing on three major industrial sectors: textile, vehicle, and musical instrument.

The area derived and advanced new industrial sectors through a chain reaction of technologies from two material processing branches. These are the cotton fabrics industry, which began under the local lords in the Edo Period, and the lumber industry, which developed as a trading center of wood from the Tenryu River, throughout the process of industrial revolutions before and after World War II. As a result, the area gave rise to today's vehicle, optoelectronic, and musical instrument industries, among others.³

This study discusses the origins, development, current state, and challenges of the musical instrument industry in Hamamatsu, which has developed into one of the greatest industrial clusters of Japan. Section 2 analyzes preceding studies, while Section 3 deals with the formation and development of the musical instrument industry. Section 4 discusses the current state and characteristics of the musical instrument industry and the three major musical instrument manufacturers, and Section 5 lists further challenges for the industry.

2. Preceding Studies on Musical Instrument Industry

Among the preceding studies on the Japanese musical instrument industry, Ohtsuka (1980) investigated industrial clusters in the Hamamatsu area and shed light on the origin and development of the musical instrument industry in the area. He emphasizes that we cannot overlook factors dating back to the Edo Period that contributed to the establishment of the musical instrument industry in Hamamatsu in the 1880s. These factors, such as the

presence of a trading center for wood and woodworkers, the assistance of local commercial capitalist groups, and industrial branches from the previous period, such as the lumber and textile machinery industries, are key for the area's dramatic development after World War II. Further, Takeo (1988) states that the musical instrument industry in Hamamatsu experienced a process of separation, independence, and selection of many enterprises to bring forth the current oligopolistic system of two major companies (Yamaha and Kawai Musical Instruments Manufacturing Co., Ltd.). He further highlights the influence of enhanced competitiveness of Korean companies on the market, where a technological outflow from Japan also played a role.

Sasaki (1998) analyzed the conditions of medium and small musical instrument manufacturers gathered in the Hamamatsu area and concluded that craft production and establishment of network-based industrial communities are the most important factors for the restoration of medium and small musical instrument manufacturers. Omura (1999) discussed the features of piano manufacturing technologies and factors for the formation of regional industrial clusters, focusing on woodworking machinery manufacturing as a basis for the formation of piano manufacturing clusters. She further investigated the situations involving technical progress and new technological innovations as seen in inter-business marketing competition.

According to the studies focusing on musical instrument manufacturers, Onoki (1966) first clarified the process of formation and development of the musical instrument industry in the Hamamatsu area, then reviewed the actual status of Yamaha in the

1960s. He narrated in detail the entrepreneurial activities of its founder Torakusu Yamaha, beginning from his early life to the foundation of an organ factory. He further refers to the company's reorganization as a stock company, the development of the piano/furniture woodworking branch, starting overseas operations, advancement in synthetic chemistry, and the founder's final years. He also considers the Yamaha company to be a masterpiece of its founder Yamaha's entrepreneurial activities and influenced by Hamamatsu characteristics. The founder provided the area with central heating. Further, Tanaka (2011) investigated Yamaha's original marketing strategy, including music education, subscription sales, and dealer networks, focusing on the marketing strategy based on Yamaha Music Schools.

The Study Report of Workshop on Regional Management and Economy of Junior College of University of Shizuoka (1994) first reviewed the economy, analyzed the impact of Yamaha's corporate strategy and financial structure, along with the establishment of a mass production system and progress of diversification, on the area's industrial structure.

Hiyama (1990) described the structure of the music industry (musical instruments, musicians, industry, copyrights, musical instrument culture, etc.), the world and companies of wind instruments, stringed instruments, and keyboard instruments. He also investigated the transition of major musical instrument manufacturers in Japan. This publication provides a deeper understanding of the Japanese musical instrument industry.

Tanaka (1998), in his study of cultural aspects, considered that the musical instruments were originally "tools" closely associated with the music culture. However, the musical instrument industry experienced changes in technical and industrial structure due to impetuous moves toward "products" of industrial production cut off from the music culture without considering surrounding factors, especially when these products are linked to electronic technologies. He further analyzed the social changes surrounding the above changes based on objective data, and touched on a transformation of styles of the modern and contemporary music culture in Japan, in which they used "culture" as "enterprise," as well as on concepts of Western musical instruments invented by the Japanese. He also pointed out that the musical instrument industry in Japan currently suffers from a decrease in needs, as it forgot an abundant cultural context fostered by the entire nation and considered the musical instruments only as tools for economic activities. He further added that this could be attributed to the deterioration of styles of the modern and contemporary music culture in Japan, in which they made use of "culture" as "enterprise," as well as of concepts of Western musical instruments invented by the Japanese.

Kashishita (2015) analyzed the production, dissemination, and quality assurance measures of educational musical instruments in postwar Japan. He also emphasized that the education and musical instrument industry was developed as a single unit under various governmental measures starting from the days after the war. The formation process of music education in Japan involved "in-

trusions of commercialism” into music education and their associated problems.

3. Formation and Development of Musical Instrument Industry

Yamaha Corporation, Kawai Musical Instruments Manufacturing Co., Ltd., and Roland Corporation have headquarters and factories in Western Shizuoka Prefecture, forming clusters. Furthermore, the area has one of the world’s largest production centers, incorporating medium and small enterprises involved in musical instrument manufacturing. This section explores the factors that contributed to the formation of this musical instrument manufacturing.

In 1887, an organ made in the US was broken in Hamamatsu Jinjou Elementary School, and Torakusu Yamaha, a founder of Yamaha, fixed it. It marked the beginning of Yamaha’s musical instrument manufacturing setup. In 1888, he founded Yamaha Fukin (Organ) Manufacturing Company at a site of an abolished temple and started manufacturing organs with seven employees.⁴ As seen in Section 2, Ohtsuka (1980) mentioned that the musical instrument industry was established in Hamamatsu in the 1880s. Although we can find clusters of musical instrument industry to some degree in prewar Hamamatsu, an extensive formation of the clusters as musical instrument production centers started only in the postwar period.⁵

First, Ohtsuka (1980) addresses the presence of woodworkers as a foundation for forming the musical instrument industry. Since most organ parts are made of wood, woodworkers play a pivotal role in producing wood parts. During the Edo Period, the local lords protected ten artisan categories,

including carpenters and sawyers, by appointing them to fixed posts. Thus, we can conclude that the presence of various workers’ groups fostered for a long time, as stated above, played a key role in forming the musical instrument industry.⁶ Second, he highlighted the support of notable locals and the utilization of local capital. The Hamamatsu area saw an important accumulation of capital against the backdrop of advanced industry; therefore, he believed that capital increases one after the other to “Nihon Gakki” must have occurred. This demonstrated that the advances of the preceding industrial branches played a role in forming a new one by providing capital.⁷ Third, Tenryu lumber and dry prevailing winds also played a role. Lumber resources in the upper Tenryu River contributed to the musical instrument industry only in the extremely early phases. However, once lumber trading centers were established, the lumber industry grew. In this case, the medium of such a situation indirectly involves lumber resources in forming clusters of minor musical instrument industry after World War II.⁸

Nozue (2017)⁹ highlighted the role of innovators with their predecessor Torakusu Yamaha while also emphasizing the importance of the abundant high-quality lumber found in the upper Tenryu River, a raw material for pianos. He also argued that woodworking techniques were accumulated in the Hamamatsu area, and they had a profound impact on the emergence of innovators in the area.

According to Ohtsuka (1980),¹⁰ most musical instrument factories are concentrated in Hamamatsu City, while the rest are distributed along National Route 1, in

Fukuroi City, Kakegawa City, and Iwata City, as well as in Arai Town. The third cluster is along the former National Route 1, from the Tenryugawa Station to Nakanomachi. This development of the musical instrument industry altered its distribution; since the 1960s, the musical instrument industry expanded over the surrounding areas. While in 1960, three clusters surrounded the respective main factories Tenryu Gakki, Nippon Gakki, and Kawai Musical Instruments, in 1975, the factories increased in areas surrounding these clusters.

In the postwar period, Hamamatsu City was revived as an industrial city. We cannot deny that the basis of that revival was capital accumulation during the prewar period's shift to heavy and chemical industries. Therefore, industries related to musical instruments and vehicles, which were leading factors in the development of the postwar "industrial city" Hamamatsu, have seen remarkable growth in the process of shifting from munitions to peacetime industry.¹¹

4. Current Status and Characteristics of the Musical Instrument Industry

4.1 Current Status of the Musical Instrument Industry

In the Japanese musical instrument industry, piano manufacturing has long been highlighted in sales volume and quantitative scale. The industry also saw remarkably enhanced domestic needs in wind instrument/stringed instrument manufacture and gained a good reputation as an export industry in the global market.¹² However, musical instrument manufacturers are

affected by weakening domestic sales due to declining birth rates and diversification of hobbies and competitions with Chinese manufacturers.

Table 1. Nationwide Market Share of Value of Shipments of Musical Instruments of Leading Manufacturing Prefectures

| Year | 1 st place | 2 nd place | 3 rd place | 4 th place | 5 th place |
|------|-------------------------|-----------------------|--------------------------|--------------------------|-----------------------|
| 2013 | Shizuoka Pref. 74.6% | Saitama Pref. 6.5% | Tokyo Metropolis 3.6% | Hokkaido 2.5% | Osaka Pref. 1.9% |
| 2014 | Shizuoka Pref. 81.1% | Saitama Pref. 5.3% | Tokyo Metropolis 2.9% | Osaka Pref. 1.3% | Gunma Pref. 1.3% |
| 2015 | Shizuoka Pref. 70.5% | Saitama Pref. 6.3% | Nagano Pref. 4.9% | Tokyo Metropolis 3.2% | Hokkaido 2.3% |
| 2016 | Shizuoka Pref. 56.2% | Saitama Pref. 7.0% | Nagano Pref. 4.8% | Tokyo Metropolis 3.1% | Hokkaido 1.4% |
| 2017 | Shizuoka Pref. 58.0% | Saitama Pref. 8.4% | Nagano Pref. 5.3% | Tokyo Metropolis 3.4% | Gunma Pref. 1.9% |
| 2018 | Shizuoka Pref. 64.8% | Saitama Pref. 8.1% | Nagano Pref. 5.7% | Tokyo Metropolis 3.2% | Gunma Pref. 2.0% |

Source: Economy and Industry Department, Shizuoka Prefecture (2021): Local Industries in Shizuoka Prefecture as Seen from Data, p.41.

<https://www.pref.shizuoka.jp/sangyou/sa-560/document/s/r2-date-jibasangyo.pdf>. (Retrieved December 21, 2021)

They have reached a turning point since the 2000s.¹³ As shown in Table 1, Shizuoka Prefecture, one of the largest production centers in Japan, has an overwhelming value of shipments of musical instrument products. However, sales of electronic musical instruments decreased with the offshoring of production sites. The value of shipments of musical instruments has been decreasing since its peak in 1991, such that the value of shipments in 2018 is approximately one-seventh of the peak.¹⁴

According to the Trade Statistics of Japan in 2019 by the Ministry of Finance (See Table 2 below), total musical instrument exports amount to 70.7 billion yen, with upright pianos (about 22.9 billion yen) and grand pianos (about 13.5 billion yen) accounting for roughly half of this total (the imports of musical instruments are 55.4 billion yen).

Table 2. Exports of Japanese Pianos (Upright pianos and Grand pianos) (FY 2019)

| Country& Region | Upright pianos | | Grand pianos | |
|-----------------|----------------|----------------|--------------|----------------|
| | Units | Value (¥1,000) | Units | Value (¥1,000) |
| P.R.China | 77,470 | 12,293,713 | 5,066 | 3,527,576 |
| Vietnam | 15,866 | 1,690,324 | 609 | 265,885 |
| USA | 5,930 | 2,156,726 | 3,045 | 3,701,650 |
| Australia | 3,317 | 1,038,778 | 665 | 656,804 |
| Malaysia | 2,700 | 247,373 | 134 | 60,140 |
| Canada | 2,350 | 686,476 | 478 | 483,353 |
| Hong Kong | 1,824 | 662,582 | 111 | 106,128 |
| R.Korea | 1,697 | 365,485 | 730 | 654,074 |
| UK | 1,489 | 438,637 | 309 | 338,140 |
| Germany | 1,367 | 691,969 | 1,034 | 1,459,544 |
| Others | 11,296 | 2,613,882 | 2,219 | 2,268,335 |
| TOTAL | 125,306 | 22,885,945 | 14,400 | 13,521,629 |

Source: Japan Music Trade Co., Ltd. (2021) Musical Instrument Industry Complete Guide, 2021 Edition, p.28. Original data are retrieved from a report by the Customs and Tariff Bureau, Ministry of Finance.

The major export destinations of upright pianos are China (77,490 units, about 12.3 billion yen), Vietnam (15,866 units, about 1.7 billion yen), and Australia (3,317 units, about 1 billion yen). In contrast, grand pianos are primarily exported to China (5,066 units, about 3.5 billion yen), the USA (3,045 units, about 3.7 billion yen), and Germany (1,034 units, about 1.5 billion yen). The exports of reed instruments and other wind instruments amount to 9.7 billion yen, piano parts and accessories to 4.8 billion yen, electric guitars to 2.9 billion yen, and guitars and other stringed instruments to 1.1 billion yen.¹⁵

While Japan’s domestic musical instrument market has been on a declining trend due to declining birth rates and diversification of hobbies, other Asian markets such as China have significantly expanded overseas. However, overseas production progress and contributions to domestic production are limited, and Chinese manufacturers increase their sales by taking advantage of low prices. In these circumstances, domestic manufacturers in Japan

take measures to develop new products using digital technologies and promote partnerships between music schools and dealers to ensure an expansion in needs.¹⁶

4.2 Three Major Musical Instrument Manufacturers

The rise of the musical instrument industry in Hamamatsu began with the career of Torakusu Yamaha; Koichi Kawai, a former engineer in Yamaha, went out on his own to establish Kawai Musical Instruments. Currently, the headquarters and factories of the three major musical instrument manufacturers in Japan are clustered in Hamamatsu. As shown in Table 3, three of the top 10 suppliers of music-related products, including musical instruments (as of 2020), are Japanese companies. This section will discuss the company profile and company history of these three companies.

Table 3. The World’s Largest Musical Products Suppliers Ranked by Revenue

| | Company Name | EST. 2020 REVENUES (\$1000) | COUNTRY | COMPANY TYPE |
|----|--|-----------------------------|-------------|---------------|
| 1 | YAMAHA CORPORATION | \$ 3,402,000 | Japan | Div. Mfg. |
| 2 | GOLD PEAK INDUSTRIES | \$ 861,800 | Hong Kong | Contract Mfg. |
| 3 | SHURE INC. | \$ 725,000 | USA | Audio Mfg. |
| 4 | FENDER MUSICAL INSTRUMENTS | \$ 720,000 | USA | Fret Mfg. |
| 5 | SENNHEISER ELECTRONIC | \$ 676,600 | Germany | Audio Mfg. |
| 6 | MUSIC TRIBE | \$ 624,000 | Philippines | Audio Mfg. |
| 7 | KAWAI MUSICAL INSTRUMENTS MFG. CO., LTD. | \$ 616,450 | Japan | Home Key |
| 8 | ROLAND CORPORATION | \$ 602,520 | Japan | Elec. Mus. |
| 9 | IN MUSIC | \$ 500,000 | USA | Elec. Mus. |
| 10 | EXERTIS NORTH AMERICA | \$ 480,000 | Canada | Dist. |

Source: Prepared by the author based on Music Trades (2021), THE GLOBAL MARKET FOR MUSIC PRODUCTS, p. 20.

4.2.1 Yamaha Corporation (as of March 31, 2021)¹⁷

(i) Company Profile:

- Established in 1887
- Incorporated on October 12, 1897
- Headquarters: Nakazawa-cho, Naka-ku, Hamamatsu City, Shizuoka Prefecture, Japan
- Capital: 28,534 million yen
- Revenue (IFRS): 372.630 million yen
- Primary business

Musical instrument business segment: the manufacture and sales of pianos; digital musical instruments; wind, string, and percussion instruments; and other music-related activities.

Audio equipment business segment: the manufacture and sales of audio products, professional audio equipment, information and telecommunication equipment, and certain other products.

Other segments: electronic devices business, automobile interior wood components, factory automation equipment, golf products, recreation, and certain other lines of businesses.

- Number of Employees (Consolidated): 20,021 (Excluding average number of temporary employees: 8,644)
- Number of Subsidiaries: 60 (of which 56 are consolidated)
- Number of Affiliated Companies: 4

(ii) Company History

- 1887: Company founder Torakusu Yamaha repairs elementary school's reed organ and successfully builds his first reed organ.
- 1889: Establishes Yamaha Fukin Seizoujo (currently Yamaha Corporation)
- 1897: Nippon Gakki. Co., Ltd. (currently Yamaha Corporation) is established with capital of 100,000 yen.

- 1900: Production of upright pianos begins.
- 1949: Listed on Tokyo Stock Exchange.
- 1954: Establishes Yamaha Music School and holds pilot classes.
- 1958: Establishes first overseas subsidiary in Mexico.
- 1959: Production of electronic organ begins.
- 1960: Establishes Yamaha International Corporation (now Yamaha Corporation of America)
- 1987: Changes corporate name from Nippon Gakki Co., Ltd. To Yamaha Corporation to mark the 100th year in business.
- 1989: Establishes subsidiaries in China, Tianjin Yamaha Electronic Musical Instruments, Inc., for manufacture and sale of digital musical instruments.
- 2018: Opens R&D facility "Innovation Center".
- November 2021: Yamaha Music School Established in Riyadh as First Officially Authorized Music Education Facility in The Kingdom of Saudi Arabia.

4.2.2 Kawai Musical Instruments Manufacturing Co., Ltd. (as of March 31, 2021)¹⁸

(i) Company Profile

- Established on August 9, 1927
- Company reorganized into a joint-stock company in 1951.
- Headquarters: Terajima-cho, Naka-ku, Hamamatsu City, Shizuoka Prefecture, Japan
- Capital: 7,122 million yen
- Consolidated Turnover : 67.520 million yen (FY2021.3)
- Primary business: Manufacturing and sales of musical instruments; operating of music schools, gymnastics schools; manufacture and sales of precision metals, wood products and electronic devices; development of

business software, music software.

- Number of Employees: 1,299 (Consolidated 2,916)

(ii) Company History

- 1927: Koichi Kawai established the Kawai Musical Instruments Research Laboratory. Begins production and sales of pianos.

- 1928: First Kawai grand piano is built.

- 1930: Starts manufacture of reed organs.

- 1951: Company reorganized into a joint-stock company with a capital of 3,500,000 yen. Renamed as “Kawai Musical Instruments Manufacturing Co., Ltd.” Capital: 3.5 million yen.

- 1956: Kawai music education program established.

- 1980: Grand Piano Factory & Piano Research Laboratory established in Ryuyo, Japan. Kawai Precision Metals Co., Ltd. established.

- 1995: Partnership with Honoris Industry established, production of musical instruments begins in Indonesia.

- 2007: First Kawai Music School in Shanghai established.

- 2008: Maisaka upright piano finishing facility moved to Ryuyo facility.

- 2012: Shanghai Kawai EMI digital piano manufacturing facility established in Shanghai, China.

- 2015: First overseas directly managed showroom opened in Houston, Texas, USA.

- 2016: Kawai Musical Instruments (China) Co., Ltd. established.

- 2018: First directly managed showroom in Europe opened in Hamburg, Germany.

4.2.3 Roland Corporation¹⁹

(i) Company Profile

- Established on April 18, 1972 (founded

by Ikutaro Kakehashi in Osaka City in 1972)

- Headquarters: Hosoe-cho, Kita-ku, Hamamatsu City, Shizuoka Prefecture, Japan

- Capital: 9,585 million yen

- Consolidated Turnover: Approximately 64 billion yen (FY2021.3)

- Primary Business: Manufacturing, marketing, and importing and exporting of electronic musical instruments, electronic equipment, and software.

- Number of Employees: 857 (Consolidated 2601, as of December 2020)

(ii) Company History

- 1972: Ikutaro Kakehashi established the company in Osaka with a capital stock of 33 million yen.

- 1973: Roland’s first synthesizer (SH-1000 synthesizer). The Hamamatsu factory is completed.

- 1978: Sales partner established in the USA.

- 1982: Sales partner established in Belgium

- 1986: Sales partner established in Italy. The Hosoe factory (present headquarters) is completed. Production company is established in Taiwan.

- 1987: Production company established in Italy.

- 1988: Classic-organ production company set up in the USA.

- 1989: Listed in the second section of the Osaka Stock Exchange. Capital stock reaches 7.6 billion yen.

- 1990: Hamamatsu R&D Center is completed.

- 1999: Listed in the first section of the Tokyo Stock Exchange and Osaka Stock Exchange.

- 2001: Production company established in

China.

- 2005: Headquarters moves to Hosoe-cho, Hamamatsu (now Hosoe-cho, Kita-ku, Hamamatsu City).

- 2007: Sales partner established in China.

- 2014: Delisted from the Tokyo Stock Exchange. Production company is established in Malaysia.

- 2020: Re-listed in the first section of the Tokyo Stock Exchange.

5. Conclusion

This study dealt with preceding studies on the musical instrument industry, its current state, and the characteristics of three major manufacturers. The Hamamatsu area formed clusters of the musical instrument industry, as it has a long history of manufacturing since the Edo Period. There are many artisans, such as woodworkers, and high-quality lumber, as the raw material for musical instruments, available in this area. More importantly, we highlighted the presence of talented innovators and local capitalists understanding and supporting them.

Though the domestic market environment for the musical instrument industry is still challenging due to a decrease in needs caused by declining birth rates, we continue to see sales growth due to business efforts in the overseas markets, especially in developing countries.

Musical instrument manufacturers in Japan should prepare strategies and make better marketing efforts in developing countries that show remarkable growth, rather than just in the USA and China, the world's largest music markets. From this perspective, we plan to further investigate

the management actions of individual companies in the future.

Notes

¹ Households and Population, a Breakdown by Administrative Wards of Hamamatsu City https://www.city.hamamatsu.shizuoka.jp/documents/3757/setaisu-jinkousu_area_r03-12.pdf (Latest access: December 27, 2021) (in Japanese)

² The Geospatial Information Authority of Japan, Ranking of Areas of Cities, Wards, Towns and Villages (as of October 1, 2012)

<https://www.gsi.go.jp/common/000077734.pdf> (Latest access: December 27, 2021) (in Japanese)

³ Sato, K. (2013), Progress and Prospects of Industrial Strength Hamamatsu, *Hamamatsu Gakuin Daigaku Chiiki Kyoso Senta Kiyo*, 1, pp.19-29. (in Japanese)

⁴ Ohtsuka, M., (1980), Musical Instrument Industry in Hamamatsu, *Geographical Review of Japan*, vol.53 no.3, p.159. (in Japanese)

⁵ Research Class of Economy, Junior College of University of Shizuoka (1994): *The Study Report of Workshop on Regional Management and Economy of Junior College of University of Shizuoka "Musical Instrument Industry and Regional Economy - Focusing on Link between Yamaha's Company Development Process and Transformation of Regional Economy,"* p.22. (in Japanese)

⁶ Ohtsuka, M., op.cit., pp.159-160.

⁷ *ibid.*, p.160. Onoki (1966) discusses the support for Torakusu Yamaha by local notables in detail.

⁸ *ibid.*, p.161. Ohtsuka (1980) points out, based on Kiuchi and Suzuki (1959), that the west winds prevailing in this area have low humidity, which is advantageous for drying the raw

wood of wood parts.

⁹ Nozue, H. (2017): Study on Industrial Clusters in Hamamatsu - Shrinking of Manufactures and Innovators, *Journal of Managerial Research*, 106, p.80. (in Japanese)

¹⁰ Ohtsuka, M., op.cit., pp.163-166.

¹¹ Research Class of Economy, Junior College of University of Shizuoka, op.cit., p.18.

¹² Japan Music Trade Co., Ltd. (2021) *Musical Instrument Industry Complete Guide, 2021 Edition*, p.23. (in Japanese)

¹³ Shizuoka Economic Research Institute Ltd. (2019): *Shizuoka Prefecture White Paper of Economy 2019 - 2020. Exploring "Reiwa" Period: Challenges to Reforms and Creation*, p.85. (in Japanese)

¹⁴ *Economy and Industry Department, Shizuoka Prefecture (2021): Local Industries in Shizuoka Prefecture as Seen from Data*, p.39. (in Japanese)
<https://www.pref.shizuoka.jp/sangyou/sa-560/documents/r2-date-jibasangyo.pdf>. (Retrieved December 21, 2021)

¹⁵ Japan Music Trade Co., Ltd. op.cit., p.23.

¹⁶ Shizuoka Economic Research Institute Ltd. op.cit., p.85.

¹⁷ Based on the information from the company information booklet and website.

<https://www.yamaha.com>. Accessed January 1, 2022)

¹⁸ Based on the information from the company information booklet and website.<https://www.kawai.co.jp> (Accessed January 1, 2022)

¹⁹ Based on the information from the company website. <https://www.roland.com> (Accessed January 1, 2022)

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