

Foreign Direct Investment in the United States

Revised 2013 Statistics



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Introduction

This report presents revised statistics that cover the activities of U.S. affiliates of foreign multinational enterprises in 2013. A U.S. affiliate is a business enterprise in which there is foreign direct investment—that is, in which a single foreign person owns or controls, directly or indirectly, 10 percent or more of the voting securities or an equivalent interest. The data on activities of U.S. affiliates cover the entire operations of the U.S. affiliate irrespective of the percentage of foreign ownership. Data are presented for two categories of U.S. affiliates—all affiliates and majority-owned affiliates (that is, those with foreign ownership of more than 50 percent). Data are available in greater detail for majority-owned affiliates in order to emphasize the firms that are unambiguously under foreign control.

The data in this report provide a comprehensive look at the finances and operations of U.S. affiliates. Data items include balance sheet details, value added, employment and employee compensation, sales, capital expenditures, trade in goods, and expenditures for research and development (R&D). These data provide comprehensive and reliable information needed to monitor, assess the impact of, and guide U.S. policy on foreign direct investment in the United States. They give a detailed picture of the levels and growth of foreign direct investment as well as its distribution by industry, by U.S. state, and by originating country.

Data Collection and Universe Estimation

The statistics in this report cover the universe of U.S. affiliates. They were derived from data reported at the enterprise, or company, level by a sample of U.S. affiliates reporting in BEA's Annual Survey of Foreign Direct Investment in the United States.

Affiliates completed the survey by submitting a BE-15A, BE-15B, or BE-15C form. The type of form filed depended on the size of the affiliate and whether the affiliate was majority-owned. The size of an affiliate is determined by these items—total assets, sales, or net income (or loss). All large majority-owned affiliates with one of these items more than \$300 million filed the most detailed BE-15A form. All mid-sized majority-owned affiliates with any one of these items more than \$120 million, but with all items less than, or equal to, \$300 million, filed on the less detailed BE-15B form. All large and mid-sized minority-owned affiliates with any of these items more than \$120 million filed on the less detailed BE-15B form.

A sub-sample of smaller affiliates that had total assets, sales, or net income (or loss) of more than \$40 million but less than, or equal to, \$120 million filed an abbreviated form, form BE-15C. Affiliates in this range were required to file the abbreviated survey form in alternate years, so the sub-sample covered about half of affiliates. The other half were not required to file. U.S. affiliates with total assets, sales, and net income (or loss) less than, or equal to, \$40 million were also exempt from reporting.

BEA estimated the data for 1) non-sampled affiliates below the size reporting threshold, 2) smaller affiliates that had previously reported total assets, sales, or

the net income (or loss) of more than \$40 million but were not part of the sub-sample for that year, and 3) affiliates that did not file a survey report even though they met the criteria for filing. Estimates for nonsampled or nonreporting affiliates that existed before 2013 were derived by extrapolating forward their data from earlier years on the basis of year-to-year movement in the data reported by other affiliates.

The use of the less detailed forms BE-15B and BE-15C allows BEA to reduce the burden on midsized, small, and minority-owned entities. For affiliates filing the BE-15C form, BEA estimated items that appear on the B form. For majority-owned entities filing the BE-15B and BE-15C forms, BEA estimated the items that appear only on the A form, so that the results are presented in the same detail for all majority-owned affiliates. However, as estimates of items that appear only on the A form are not prepared for minority-owned affiliates. Therefore, the results for all affiliates (majority-owned plus minority-owned affiliates) cover only the items that are on the less detailed B form.

Comparability with the 2012 benchmark survey data

The concepts and definitions underlying the 2013 statistics are the same as those used for the 2012 benchmark survey. They are described in *Foreign Direct Investment in the United States: Final Results From the 2012 Benchmark Survey*, which is available on BEA's Web site.

Consistent with the data from the 2012 benchmark survey, the 2013 statistics by industry are based on industry classifications derived from the 2012 *North American Industry Classification System* (NAICS). For most industries, the classifications based on this system are identical to those in the 2007 NAICS-based industry classification system used in the 2007 benchmark survey and in the 2008–2011 annual surveys.

The 2013 estimates update the universe data for U.S. affiliates from the 2012 benchmark survey. However, the 2013 estimates of a few items that are shown separately in the benchmark data are combined with other items, and the 2013 estimates of some items are unavailable because data for these items were only collected in the benchmark survey, but not in the annual survey.

For similar items, the statistics for affiliates in the 2012 benchmark survey report and in the 2013 annual survey report are comparable with the statistics for affiliates in the benchmark and annual survey reports for 2007–2011 and are similar to the statistics for nonbank affiliates in the reports for earlier years. (Before the 2007 benchmark survey, bank affiliates were exempt from filing reports in nonbenchmark survey years; therefore, the tabulated statistics on affiliate activities in nonbenchmark years only covered nonbank affiliates.) Table 1 provides cross-references between the tables in the 2012 benchmark survey report and in this report and the corresponding tables in the benchmark survey report for 2007 and in the annual survey reports for 2008–2011. Some of the tables in the 2007 and 2012 benchmark survey reports do not have counterparts in this report or in the annual survey reports for 2008–2011, because they cover items that are not collected in annual survey years. In addition, some of tables in the 2007 benchmark survey report do not have counterparts in the 2012 benchmark survey

report, this report, or the annual survey reports for 2008–2011, because they present state-level detail on gross property, plant, and equipment and on manufacturing employment as well as some other statistics that were discontinued as a result of budget cuts. Recent funding increases for foreign direct investment statistics have allowed BEA to again collect the state-level information for U.S. affiliates, beginning with the annual survey for 2014.

Comparability with all U.S. data

Employment, value added, trade in goods, and R&D data on U.S. affiliates can be compared with data on all U.S. private businesses to gauge the share of U.S. economic activity accounted for by U.S. affiliates. For aggregate employment, comparable data for all U.S. private industries are available in line 3 of table 6.4D of BEA's national income and product accounts (NIPAs). For value added, comparable data from U.S. private industry are available from BEA's gross domestic product (GDP) by industry accounts. For improved comparability, U.S. private industry value added should be adjusted to exclude value added by private households, imputed rental income from owner-occupied housing, rental income of persons, and business transfer payments.

Data on U.S. imports and exports of goods by U.S. affiliates are comparable with the data on U.S. trade in goods available from the U.S. Census Bureau at www.census.gov. Data on R&D expenditures by U.S. affiliates are comparable with the data on business R&D performed in the United States from the National Science Foundation at www.nsf.gov.

For employment by industry, data on employment for all U.S. private industries in table 6.4D of the NIPAs, which are by industry of the individual business establishment, are most comparable with BEA's data on affiliate employment by industry of sales, which approximate an establishment-based disaggregation. To improve comparability with the U.S. affiliate data, employment at central reserve banks, available from the Bureau of Labor Statistics, can be subtracted from total employment in finance and insurance from the NIPA data. Estimates of value added, exports and imports of goods, and R&D of U.S. affiliates are classified by industry of enterprise, which assigns a single industry to the entire business enterprise. In contrast, all U.S. data for these items are classified by industry of establishment, which assigns each business location to a specific industry. As a result, these items can only be compared at aggregate levels and not across specific industry categories.

For employment by state, comparable data are available in the table "Full-Time and Part-Time Wage and Salary Employment by Industry (SA27, SA27N)" from BEA's regional economic accounts which can be accessed from the interactive tables for "Personal Income and Employment" under "State Annual Personal Income & Employment" and "Annual State Personal Income and Employment." Private household employment, which is also available in this table, should be subtracted from these data. For all of the employment comparisons, the U.S. affiliate data on employment in Puerto Rico, in "other U.S. areas," and in "foreign" must be excluded from the U.S. affiliate data because the all U.S. data on private industry employment only cover employment in the 50 states and the District of Columbia.

Data Availability

Detailed statistics on U.S. affiliate operations for 1977–2014 are available on BEA's Web site. For information on these statistics and how to access them, see www.bea.gov/international/index.htm.

Staff Contacts

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**Table 1. Comparison of Tables in This Report With Those in the 2012 and 2007
Benchmark Survey Reports and in the Annual Survey Reports for 2008–2011—Continues**

Table in 2012 benchmark survey report	Comparable table in 2013 report	Comparable table in 2007 benchmark survey report	Comparable table in 2008–2011 reports
Part I. All Affiliates			
Group A. Selected Data			
I.A 1–I.A 5 I.A 7 I.A 9	I.A 1–I.A 5 I.A 7 I.A 9	I.A 1–I.A 5 I.A 7 I.A 9	I.A 1–I.A 5 I.A 7 I.A 9
Group B. Balance Sheet			
I.B 1–I.B 3	I.B 1I.B 3	I.B 1–I.B 3	I.B 1–I.B 3
Group C. Property, Plant, and Equipment			
I.C 3 n.a. ¹	I.C 3 n.a. ¹	I.C 3 I.C 7	I.C 3 n.a.
Group D. Income Statement			
I.D 3	I.D 3	I.D 3	I.D 3
Group G. Employment			
I.G 3 I.G 17	I.G 3 I.G 17	I.F 3 I.F 18	I.F 3 I.F 18
Part II. Majority-Owned Affiliates			
Group A. Selected Data			
II.A 1–II.A 9	II.A 1–II.A 9	II.A 1–II.A 9	II.A 1–II.A 9
Group B. Balance Sheet			
II.B 1–II.B 4 II.B 5–II.B 7	II.B 1–II.B 4 II.B 5–II.B 7	II.B 1–II.B 4 II.B 5–II.B 7	II.B 1–II.B 4 n.a.
Group C. Property, Plant, and Equipment			
II.C 1–II.C 3 II.C 4 n.a. ¹ n.a. II.C 16–II.C 17	II.C 1–II.C 3 II.C 4 n.a. ¹ n.a. II.C 16–II.C 17	II.C 1–II.C 3 n.a. II.C 5–II.C 15 II.C 16–II.C 17 II.C 18–II.C 19	II.C 1–II.C 3 II.C 4 n.a. n.a. II.C 18–II.C 19
Group D. Income Statement			
II.D 1–II.D 4 II.D 5–II.D 6 II.D 7–II.D 8 II.D 9 II.D 10–II.D 11	II.D 1–II.D 4 II.D 5–II.D 6 II.D 7–II.D 8 II.D 9 II.D 10–II.D 11	II.D 1–II.D 4 II.D 5–II.D 6 II.D 7–II.D 8 II.D 9 II.D 10–II.D 11	II.D 1–II.D 4 n.a. II.D 7–II.D 8 n.a. II.D 10–II.D 11
Group E. Goods and Services Supplied			
II.E 1–II.E 4	II.E 1–II.E 4	II.D 12–II.D 15	II.D 12–II.D 15

See the note and footnote at the end of the table.

**Table 1. Comparison of Tables in This Report With Those in the 2012 and 2007
Benchmark Survey Reports and in the Annual Survey Reports for 2008–2011—Table Ends**

Table in 2012 benchmark survey report	Comparable table in 2013 report	Comparable table in 2007 benchmark survey report	Comparable table in 2008–2011 reports
Group F. Value Added			
II.F 1–II.F 3 II.F 4 II.F 5–II.F 6	II.F 1–II.F 3 II.F 4 II.F 5–II.F 6	II.E 1–II.E 3 II.E 4 II.E 5–II.E 6	II.E 1–II.E 3 n.a. II.E 5–II.E 6
Group G. Employment and Compensation of Employees			
II.G 1–II.G 4 II.G 5 II.G 6–II.G 8 II.G 9 II.G 10–II.G 11 II.G 12 n.a. ¹ n.a. II.G 14–II.G 16	II.G 1–II.G 4 II.G 5 II.G 6–II.G 8 II.G 9 II.G 10–II.G 11 II.G 12 n.a. ¹ n.a. II.G 14–II.G 16	II.F 1–II.F 4 II.F 5 II.F 6–II.F 8 II.F 9 II.F 10–II.F 11 II.F 12 II.F 13 II.F 14 II.F 15–II.F 17	II.F 1–II.F 4 n.a. II.F 6–II.F 8 n.a. II.F 10–II.F 11 n.a. n.a. n.a. n.a. II.F 15–II.F 17
Group H. U.S. Trade in Goods			
II.H 1–II.H 4 II.H 5 II.H 6–II.H 7 II.H 8 II.H 9–II.H 24	II.H 1–II.H 4 II.H 5 II.H 6–II.H 7 II.H 8 n.a.	II.G 1–II.G 4 II.G 5 II.G 6–II.G 7 II.G 8 II.G 9–II.G 24	II.G 1–II.G 4 n.a. II.G 6–II.G 7 n.a. n.a.
Group I. Interest, Dividends, Taxes Other Than Income Taxes, and Research and Development Expenditures			
II.I 1–II.I 2 II.I 3 II.I 4–II.I 5 II.I 6	II.I 1–II.I 2 II.I 3 n.a. II.I 6	II.H 1–II.H 2 II.H 3 II.H 4–II.H 5 II.H 6	II.H 1–II.H 2 n.a. n.a. II.H 6

n.a. Not available
1. Data for the tables in the 2007 benchmark survey publication were not collected in the 2012 benchmark survey or in the annual surveys for

2008–2011 or 2013 but are being collected in the annual surveys for 2014 forward; these tables are scheduled for inclusion in the annual survey publications for 2014 and subsequent years.

General Notes to the Tables

- A U.S. affiliate is a U.S. business enterprise in which a single foreign person owns or controls, directly or indirectly, 10 percent or more of the voting securities if the enterprise is incorporated or an equivalent interest if the enterprise is unincorporated. “Person” is broadly defined to include any individual, corporation, branch, partnership, associated group, association, estate, trust, or other organization and any government (including any corporation, institution, or other entity or instrumentality of government). A “foreign person” is any person resident outside the United States—that is, outside the 50 States, the District of Columbia, the Commonwealth of Puerto Rico, and all U.S. territories and possessions.
- A majority-owned U.S. affiliate is a U.S. affiliate that is owned more than 50 percent by foreign direct investors.
- A foreign parent is the first person outside the United States in a U.S. affiliate’s ownership chain that has a direct investment interest in the affiliate.
- An ultimate beneficial owner (UBO) is that person, proceeding up a U.S. affiliate’s ownership chain, beginning with and including the foreign parent, that is not owned more than 50 percent by another person.
- A foreign parent group consists of (1) the foreign parent, (2) any foreign person, proceeding up the foreign parent’s ownership chain, that owns more than 50 percent of the person below it, up to and including the UBO, and (3) any foreign person, proceeding down the ownership chains of each of these members, that is owned more than 50 percent by the person above it.
- The statistics in this report cover the universe of U.S. affiliates of foreign multinational enterprises. The one exception is number of U.S. affiliates, which cover affiliates with total assets, sales, or net income (or loss) of more than \$20 million.
- The statistics are on a fiscal year basis. The fiscal year of an affiliate is defined as the financial reporting year that ended in the calendar year. Unless otherwise specified, all balances are as of the close of fiscal year 2013.
- To ascertain the subindustries in an industry group, see tables I.A 2 and II.A 2.
- To ascertain the countries in a geographical area, see tables I.A 3 and II.A 3.
- The European Union (28) comprises Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, and the United Kingdom.

- OPEC is the Organization of Petroleum Exporting Countries. Its members are Algeria, Angola, Ecuador, Iran, Iraq, Kuwait, Libya, Nigeria, Qatar, Saudi Arabia, the United Arab Emirates, and Venezuela.
- The “United Kingdom Islands, Caribbean” consists of the British Virgin Islands, the Cayman Islands, Montserrat, and the Turks and Caicos Islands.
- In the tables in which the data are disaggregated by state, “other U.S. areas” consists of the U.S. Virgin Islands, Guam, American Samoa, U.S. offshore oil and gas sites, and all other outlying U.S. areas; the “foreign” category consists of the employees of U.S. affiliates working abroad for more than 1 year.
- In the tables in which the data are disaggregated by the industry of the ultimate beneficial owner, the industry “government and government-related entities” consists of foreign governments, government-owned or government-sponsored agencies, quasi-government organizations, and government run pension funds.
- An asterisk “(*)” indicates a nonzero value between –\$500,000 and \$500,000 or fewer than 50 employees.
- Detail may not add to the total, because of rounding.
- A “(D)” indicates that the data have been suppressed to avoid the disclosure of the data of individual companies. For employment cells that have been suppressed, a letter in the data cell indicates an employment size range; the ranges are indicated at the bottom of the tables.
- For footnotes specific to each table see the footnotes following the last table in the complete report or in the “Footnotes to the tables” in the “Introduction, Notes, and Survey Forms” section of the Web site used to access this data.