

# Foreign Direct Investment in the United States

## Preliminary 2013 Statistics



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# Contents

Introduction .....	1
General Notes to the Tables.....	7
Footnotes to the Tables.....	104

## Part I: All Affiliates

### Group A. Selected Data

I.A 1. Selected Data of Affiliates .....	1
I.A 2. Selected Data of Affiliates by Industry of Affiliate.....	2
I.A 3. Selected Data of Affiliates by Country of UBO	6
I.A 4. Number of Affiliates With Assets, Sales, or Net Income (or Loss) Greater Than \$20 Million, Industry of Affiliate by Employment Size Class.....	8
I.A 5. Number of Affiliates With Assets, Sales, or Net Income (or Loss) Greater Than \$20 Million, Country of UBO by Employment Size Class .....	12
I.A 7. Selected Data of Affiliates, by Country of UBO and Country of Foreign Parent .....	14
I.A 9. Number of Affiliates With Assets, Sales, or Net Income (or Loss) Greater Than \$20 Million That Have Employment, State by Country of UBO .....	15

### Group B. Balance Sheet

I.B 1. Balance Sheet of Affiliates, Industry of Affiliate by Account .....	16
I.B 2. Balance Sheet of Affiliates, Country of UBO by Account .....	17
I.B 3. Total Assets of Affiliates, Industry of Affiliate by Country of UBO.....	18

### Group C. Property, Plant, and Equipment

I.C 3. Gross Property, Plant, and Equipment of Affiliates, Industry of Affiliate by Country of UBO.....	19
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### Group D. Income Statement

I.D 3. Sales by Affiliates, Industry of Affiliate by Country of UBO .....	20
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### Group G. Employment

I.G 3. Employment of Affiliates, Industry of Affiliate by Country of UBO .....	21
I.G 17. Employment of Affiliates by State .....	22

## Part II: Majority-Owned Affiliates

### Group A. Selected Data

II.A 1. Selected Data of Affiliates .....	23
II.A 2. Selected Data of Affiliates by Industry of Affiliate.....	24
II.A 3. Selected Data of Affiliates by Country of UBO .....	28
II.A 4. Number of Affiliates With Assets, Sales, or Net Income (or Loss) Greater Than \$20 Million, Industry of Affiliate by Employment Size Class.....	30
II.A 5. Number of Affiliates With Assets, Sales, or Net Income (or Loss) Greater Than \$20 Million, Country of UBO by Employment Size Class .....	34
II.A 6. Selected Data of Affiliates by Industry of UBO .....	36
II.A 7. Selected Data of Affiliates, by Country of UBO and Country of Foreign Parent .....	37
II.A 8. Sales and Employment of Affiliates, Industry of Affiliate and Industry of Sales .....	38
II.A 9. Number of Affiliates With Assets, Sales, or Net Income (or Loss) Greater Than \$20 Million That Have Employment, State by Country of UBO .....	42

## **Group B. Balance Sheet**

II.B 1.	Balance Sheet of Affiliates, Industry of Affiliate by Account .....	43
II.B 2.	Balance Sheet of Affiliates, Country of UBO by Account.....	44
II.B 3.	Total Assets of Affiliates, Industry of Affiliate by Country of UBO .....	45
II.B 4.	Total Assets of Affiliates, Country of UBO by Industry of Affiliate .....	46
II.B 5.	Total Assets of Affiliates, Industry of Affiliate by Industry of UBO .....	47
II.B 6.	Total Assets of Affiliates, Country of UBO by Industry of UBO.....	48
II.B 7.	Owners' Equity of Affiliates, Industry of Affiliate by Country of UBO.....	49

## **Group C. Property, Plant, and Equipment**

II.C 1.	Gross Property, Plant, and Equipment of Affiliates, Industry of Affiliate by Type .....	50
II.C 2.	Gross Property, Plant, and Equipment of Affiliates, Country of UBO by Type.....	51
II.C 3.	Gross Property, Plant, and Equipment of Affiliates, Industry of Affiliate by Country of UBO .....	52
II.C 4.	Opening and Closing Balances, and Change by Account, in Property, Plant, and Equipment of Affiliates.....	53
II.C 16.	Property, Plant, and Equipment Expenditures by Affiliates, Industry of Affiliate by Country of UBO ...	54
II.C 17.	Expenditures for Plant and Equipment by Affiliates, Industry of Affiliate by Country of UBO .....	55

## **Group D. Income Statement**

II.D 1.	Income Statement of Affiliates, Industry of Affiliate by Account .....	56
II.D 2.	Income Statement of Affiliates, Country of UBO by Account .....	57
II.D 3.	Sales by Affiliates, Industry of Affiliate by Country of UBO .....	58
II.D 4.	Sales by Affiliates, Country of UBO by Industry of Affiliate .....	59
II.D 5.	Sales by Affiliates, Industry of Affiliate by Industry of UBO .....	60
II.D 6.	Sales by Affiliates, Country of UBO by Industry of UBO .....	61
II.D 7.	Sales by Affiliates, Industry of Sales by Industry of Affiliate .....	62
II.D 8.	Sales by Affiliates, Industry of Sales by Country of UBO .....	63
II.D 9.	Sales by Affiliates, Country of UBO by Industry of Sales .....	64
II.D 10.	U.S. Income Taxes of Affiliates, Industry of Affiliate by Country of UBO .....	65
II.D 11.	Net Income of Affiliates, Industry of Affiliate by Country of UBO .....	66

## **Group E. Goods and Services Supplied**

II.E 1.	Goods and Services Supplied by Affiliates by Industry of Affiliate.....	67
II.E 2.	Goods and Services Supplied by Affiliates by Country of UBO.....	68
II.E 3.	Goods Supplied by Affiliates, Industry of Affiliate by Country of UBO .....	69
II.E 4.	Services Supplied by Affiliates, Industry of Affiliate by Country of UBO .....	70

## **Group F. Value Added**

II.F 1.	Value Added of Affiliates, Industry of Affiliate by Component .....	71
II.F 2.	Value Added of Affiliates, Industry of Affiliate by Country of UBO .....	72
II.F 3.	Value Added of Affiliates, Country of UBO by Industry of Affiliate .....	73
II.F 4.	Value Added of Affiliates, Industry of Affiliate by Industry of UBO .....	74
II.F 5.	Value Added of Affiliates, Country of UBO by Industry of UBO .....	75
II.F 6.	Profit-Type Return of Affiliates, Industry of Affiliate by Country of UBO .....	76

## **Group G. Employment and Compensation of Employees**

II.G 1.	Employment and Compensation of Employees of Affiliates by Industry of Affiliate .....	77
II.G 2.	Employment and Compensation of Employees of Affiliates by Country of UBO .....	78
II.G 3.	Employment of Affiliates, Industry of Affiliate by Country of UBO .....	79
II.G 4.	Employment of Affiliates, Country of UBO by Industry of Affiliate .....	80
II.G 5.	Employment of Affiliates, Industry of Affiliate by Industry of UBO .....	81
II.G 6.	Employment of Affiliates, Country of UBO by Industry of UBO .....	82
II.G 7.	Employment of Affiliates, State by Industry of Affiliate .....	83
II.G 8.	Employment of Affiliates, State by Country of UBO .....	84
II.G 9.	Employment of Affiliates, State by Industry of UBO .....	85
II.G 10.	Employment of Affiliates, Industry of Sales by Industry of Affiliate .....	86
II.G 11.	Employment of Affiliates, Industry of Sales by Country of UBO .....	87
II.G 12.	Employment of Affiliates, Country of UBO by Industry of Sales .....	88
II.G 14.	Research and Development Employment of Affiliates, Industry of Affiliate by Country of UBO .....	89
II.G 15.	Compensation of Employees of Affiliates, Industry of Affiliate by Country of UBO .....	90
II.G 16.	Number of Affiliates With Assets, Sales, or Net Income (or Loss) Greater Than \$20 Million That Have Employment, State by Employment Size Class.....	91

## **Group H. U.S. Trade in Goods**

II.H 1.	U.S. Trade in Goods of Affiliates, Industry of Affiliate by Transactor .....	92
II.H 2.	U.S. Trade in Goods of Affiliates, Country of UBO by Transactor.....	93
II.H 3.	U.S. Exports of Goods Shipped by Affiliates, Industry of Affiliate by Country of UBO .....	94
II.H 4.	U.S. Exports of Goods Shipped by Affiliates to the Foreign Parent Group, Industry of Affiliate by Country of UBO.....	95
II.H 5.	U.S. Exports of Goods Shipped by Affiliates to Foreigners Other Than the Foreign Parent Group, Industry of Affiliate by Country of UBO .....	96
II.H 6.	U.S. Imports of Goods Shipped to Affiliates, Industry of Affiliate by Country of UBO .....	97
II.H 7.	U.S. Imports of Goods Shipped to Affiliates by the Foreign Parent Group, Industry of Affiliate by Country of UBO.....	98
II.H 8.	U.S. Imports of Goods Shipped to Affiliates by Foreigners Other Than the Foreign Parent Group, Industry of Affiliate by Country of UBO .....	99

## **Group I. Interest, Dividends, Taxes Other Than Income Taxes, and Research and Development Expenditures**

II.I 1.	Interest, Dividends or Remitted Profits, Taxes Other Than Income and Payroll Taxes, of Affiliates, by Industry of Affiliate .....	100
II.I 2.	Interest, Dividends or Remitted Profits, Taxes Other Than Income and Payroll Taxes, of Affiliates, by Country of UBO.....	101
II.I 3.	Taxes Other Than Income and Payroll Taxes Paid by Affiliates, Industry of Affiliate by Country of UBO .....	102
II.I 6.	Research and Development Performed by Affiliates, Industry of Affiliate by Country of UBO .....	103

# Introduction

This report presents preliminary 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 a foreign ownership of greater than 50 percent). Data are available in greater detail for majority-owned affiliates in order to place emphasis on those firms that are unambiguously under foreign control.

The data in this publication 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). BEA's 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, U.S. state, and originating country.

## Data Collection and Universe Estimation

The statistics in this report cover the universe of U.S. affiliates. They were derived by combining 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 with BEA estimates for affiliates not in the sample. Affiliates that filed survey reports consisted of (1) affiliates that had total assets, sales, or net income (or loss) of more than \$120 million in 2013 plus (2) a sample of smaller affiliates that had total assets, sales, or net income (or loss) of more than \$40 million in 2013. Depending on their size and whether or not they were majority owned, affiliates in the former category reported on one of two survey forms, form BE-15A or form B-15B. Majority-owned affiliates with total assets, sales, or net income (or loss) of more than \$300 million were required to report on the more detailed A form. To minimize the burden on survey respondents, the less detailed B form was filed by mid-sized majority-owned affiliates (that is, those with had total assets, sales, or net income (or loss) of more than \$120 million but less than or equal to \$300 million). For these affiliates, 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. The B form was also filed by all minority-owned affiliates that had total assets, sales, or net income (or loss) of more than \$120 million. 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.

A 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 with a few basic data items that were used as the basis for estimating data for other data items included on the A or B forms. Affiliates in this range were required to file the abbreviated survey form in alternate years, so the sample covered about half of these affiliates. U.S. affiliates with total assets, sales, and net income (or loss) less than or equal to \$40 million were exempt from reporting. BEA estimated the data for these exempt affiliates and for nonsampled affiliates that had previously reported total assets, sales, or net income (or loss) of more than \$40 million, as well as for affiliates that did not file a survey report even though they met the criteria for filing. Estimates for exempt, 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. Estimates for new exempt or nonreporting affiliates in 2013 were based on data they reported in BEA's quarterly surveys of foreign direct investment in the United States.

## Comparability to 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*, 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 revision to the North American Industry Classification System (NAICS). For most industries, the classifications under this new system are identical to those in the 2007 NAICS-based industry classification system used in the benchmark and annual surveys for 2007–2011.

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, not in the annual survey.

For similar items, the statistics for affiliates in the 2012 benchmark survey report and in the 2013 report are comparable to the statistics for affiliates in the 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 covered nonbank affiliates only.) 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 2012 and 2007 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 nonbenchmark 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 that was discontinued as a result of tightened resource constraints. (As a result of funding increases for international direct investment statistics included in the Consolidated Appropriations Act of 2014, this state-level information will again be collected 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 industry are available in line 3 of table 6.4D of BEA's national income and product accounts (NIPAs). 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 establishment, are most comparable to 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. For employment by state, comparable data are available from BEA's regional economic accounts at the link to "State Annual Personal Income and Employment" in table SA\_27\_90. Private household employment, available from table SA\_27\_1904, 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.

For value added, comparable data from U.S. private industry are available from BEA's gross domestic product by industry accounts. For improved comparability, U.S. private industry value added should be adjusted to exclude value added in 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 to the data on U.S. trade in goods available from the Census Bureau at [www.census.gov](http://www.census.gov). Data on R&D expenditures by U.S. affiliates are comparable to the data on business and industrial R&D performed in the United States available from the National Science Foundation at [www.nsf.gov](http://www.nsf.gov).

## **Data Availability**

Detailed statistics of U.S. affiliate operations for 1977–2013 are available on BEA's Web site; for information on these statistics and how to access them, see [www.bea.gov/international/index.htm](http://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
<b>Part I. All Affiliates</b>			
<b>Group A. Selected Data</b>			
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
<b>Group B. Balance Sheet</b>			
I.B 1–I.B 3	I.B 1I.B 3	I.B 1–I.B 3	I.B 1–I.B 3
<b>Group C. Gross Property, Plant, and Equipment</b>			
I.C 3 n.a. <sup>1</sup>	I.C 3 n.a. <sup>1</sup>	I.C 3 I.C 7	I.C 3 n.a.
<b>Group D. Income Statement</b>			
I.D 3	I.D 3	I.D 3	I.D 3
<b>Group G. Employment</b>			
I.G 3 I.G 17	I.G 3 I.G 17	I.F 3 I.F 18	I.F 3 I.F 18
<b>Part II. Majority-Owned Affiliates</b>			
<b>Group A. Selected Data</b>			
II.A 1–II.A 9	II.A 1–II.A 9	II.A 1–II.A 9	II.A 1–II.A 9
<b>Group B. Balance Sheet</b>			
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.
<b>Group C. Gross Property, Plant, and Equipment</b>			
II.C 1–II.C 3 II.C 4 n.a. <sup>1</sup> n.a. II.C 16–II.C 17	II.C 1–II.C 3 II.C 4 n.a. <sup>1</sup> 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
<b>Group D. Income Statement</b>			
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
<b>Group E. Goods and Services Supplied</b>			
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
<b>Group F. Value Added</b>			
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
<b>Group G. Employment and Compensation of Employees</b>			
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. <sup>1</sup> 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. <sup>1</sup> 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
<b>Group H. U.S. Trade in Goods</b>			
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.
<b>Group I. Interest, Dividends, Taxes Other Than Income Taxes, and Research and Development Expenditures</b>			
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 chain(s) 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 counts of U.S. affiliates, which cover affiliates with total assets, sales, or net income (or loss) greater 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 grouping, 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” includes British Virgin Islands, Cayman Islands, Montserrat, and 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 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.
- See the footnotes following the last table.