

Survey of Business Sentiment on Japanese Corporations in Thailand
for the 2nd half of 2011

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Survey of Business Sentiment on Japanese Corporations in Thailand for the 2nd half of 2011

JCC Economic Survey Team

Survey Period

Questionnaire requesting date December 16, 2011
Questionnaire response deadline January 15, 2012

Questionnaires response

This questionnaire was handed out to
1,345 JCC member corporations.
(Eleven governmental organizations are excluded.)

No. of firms responding this questionnaire
366 corporations

The percentage of response
27.2 percent

*No. of firms directly affected by the 2011 Thailand floods to
their buildings or facilities
69 corporations (Manufacture: 51, Non-manufacture: 18)

No. of firms

Industry		No.
Manufacture	Food	14
	Textile	8
	Chemical	24
	Steel/ non-ferrous metal	28
	General machinery	14
	Electric/ electronics machinery	36
	Transportation machinery	58
	Others	38
Manufacturing sector total		220
Non-manufacture	Trading	54
	Retailer	11
	Finance/ insurance/ securities	16
	Construction/ civil engineering	18
	Transportation/ communication	23
	Others	24
Non- manufacturing sector total		146
Total		366

Note

Since the number of corporations responding this questionnaire is not sufficient, it may not be advisable to judge the situation only by seeing the percentage.

Report of response to this questionnaire

Please refer to the following pages.

1. BUSINESS SENTIMENT

(1) Summary

From the first half of 2011 to the first half of 2012, the target period of this survey, business sentiment is anticipated to be continuingly “improving” until the first half of 2011, and to turn to be “deteriorating” in the second half of 2011 due to the Thailand floods. However, it is expected to be rapidly increasing again in the first half of 2012. (Table 1-1)

(Table 1-1) Business Sentiment

	Past Surveys										Survey this time		
	Result								Forecast		Result		Forecast
	07H1	07H2	08H1	08H2	09H1	09H2	10H1	10H2	11H1	11H2	11H1	11H2	12H1
Improving	39	49	57	21	15	71	72	71	42	69	57	27	64
No change	30	27	23	15	17	14	15	18	21	21	18	15	18
Deteriorating	31	24	20	65	68	16	12	12	38	10	25	58	18
(Ref) DI	8	25	37	-44	-53	55	60	59	4	59	32	-31	46

(Note)

1. DI = “improving” – “deteriorating”

2. Since the fraction of percentage is rounded off, the totaling may not be equal to 100 percent. This also applies to the tables below.

(Note) To determine whether business performance are “improving” or “deteriorating”, business performance is to be compared between in this term and in the previous term. If DI, which is the balance between those two figures, is above the neutral level, it signifies that business performance is improving even though the indicator declined from the previous term.

(2) The first half of 2011 (January – June)

The percentage of the firms reporting that business sentiment was “improving” decreased to 57 percent from the previous term (71 percent), whereas that reporting “deteriorating” was increasing to 25 percent from the previous term (12 percent). As a result, diffusion Index (DI), which is the balance between “improving” and “deteriorating”, was calculated at +32 percent, minus 27 points from the previous term (+59). However, the overall DI rose by 28 points from the DI forecasted in the previous survey (+4) where the improvement seed had been anticipated to be decreased due to the effects of the Great East Japan Earthquake. (Table 1-1)

In the manufacturing sector, the DIs were continuingly increasing in the food and textile industries, but turned to be “deteriorating” in the chemical and transportation machinery industries. As a result, the overall DI in the manufacturing sector was decreasing to +16 from the previous term (+52). For the non-manufacturing sector, increased improvement seed in the constructions/ civil engineering industry has not been compensated by decreased improvement seed in the other industries. As a result, the overall DI in the non-manufacturing sector was decreasing by 11 points to +59 from the previous term (+70). (Table 1-2)

(3) The second half of 2011 (June – December)

The percentage of the firms reporting that business performance are “improving” decreased by 30 points to 27 percent from the previous term (57 percent), whereas the percentage of the firms reporting “deteriorating” increased to 58 percent from the previous term (25 percent). As a result, the overall DI of -31 was lower than the previous term (+32). (Table 1-1)

In the manufacturing sector, improvement seed decreased in all the industries. As a result, the overall DI of -49 was lower than the previous period (+16) by 65 points. In the non-manufacturing sector, the improvement rate decreased in all the industries except construction/ civil engineering. As a result of this, the overall DI of -3 was lower than the previous period (+59) by 62 points. (Table 1-2)

(4) The first half of 2012 (January – June)

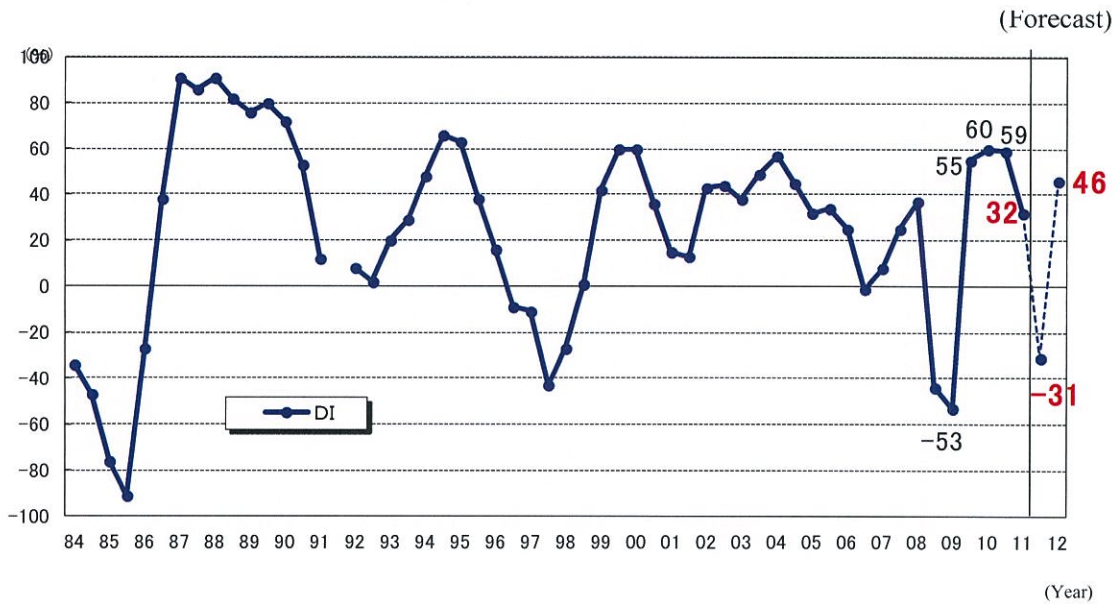
The percentage of the firms reporting that business performance was “improving” was increasing by 37 points to 64 percent from the previous term (27 percent), whereas the percentage of the firms reporting “deteriorating” fell by 40 points to 18 percent from the previous term (58 percent). As a result, the overall DI of +46 was greater than the previous term (-31), and improvement in business environment is expected to be increasing. (Table 1-1)

In the manufacturing sector, the DIs were expected to be increasing in all the industries except textile. As a result, the overall DI of +44 in the manufacturing sector was greater than the previous period (-49). In the non-manufacturing sector, the DIs are expected to be increasing in all the industries. As a result, the overall DI in the non-manufacturing sector rose to +50 from the previous period (-3). (Table 1-2)

(Table 1-2) DI by the industry (“improving” – “deteriorating”)

Industry		Past Surveys								Survey this time		
		Result						Forecast		Result	Forecast	
		08H1	08H2	09H1	09H2	10H1	10H2	11H1	11H2	11H1	11H2	12H1
Manufacture	Food	13	27	33	54	0	0	57	26	29	-14	14
	Textile	33	-28	-40	43	15	18	46	40	38	-12	-63
	Chemical	44	-62	-32	84	75	55	-26	53	-12	-50	44
	Steel/ non-ferrous metal	58	-70	-88	70	96	68	-10	57	18	-57	60
	General machinery	25	-50	-57	70	77	47	20	54	57	-29	86
	Electric/ electronics machinery	18	-55	-35	74	65	38	4	50	27	-67	8
	Transportation machinery	55	-46	-88	82	87	94	-52	84	-7	-62	76
	Others	39	-45	-68	45	62	42	-3	47	32	-34	32
	Manufacturing sector total	38	-46	-57	69	67	52	-7	55	16	-49	44
Non-manufacture	Trading	68	-57	-43	61	83	83	0	62	59	-13	42
	Retailer	75	-16	9	75	12	100	46	73	82	9	82
	Finance/ insurance/ securities	10	-33	-47	33	54	82	53	65	64	-50	7
	Construction/ civil engineering	4	-25	-67	-35	7	50	75	50	88	82	82
	Transportation/ communication	32	-67	-53	37	69	55	0	67	32	-59	59
	Others	16	-20	-56	19	17	53	21	68	52	28	48
	Non-manufacturing sector total	35	-39	-47	34	48	70	23	63	59	-3	50
Total		26	1	-50	3	56	59	4	59	32	-31	46

(Figure 1) Trend survey of diffusion index (DI) in the Japanese corporations.



- (Note)
1. Diffusion Index (DI) = improving – deteriorating
 2. No survey was performed in the second half of 1991.

2. SALES

The percentage of the firms reporting an “increase” in their total sales in 2011 fell by 25 points to 57 percent from the previous year (82 percent). (At the time of the previous survey, the forecast for 2011 had been 72 percent.) The percentage of the firms reporting a “more than 20% increase” in their total sales fell by 31 points to 15 percent from the previous year (46 percent). (Table 2-1 and Table 2-2)

Regarding sales forecast for 2012, the firms anticipating an “increase” in their total sales rose by 19 points to 76 percent from the previous period (57 percent), and the percentage of the firms anticipating a “more than 20% increase” in their total sales also rose by 9 points, from 15 percent in the previous period to 24 percent. (Table 2-1 and Table 2-3).

(Table 2-1) Change in total sales

Unit: percent

Year	Past Surveys										Survey this time	
	Result										Forecast	
	03	04	05	06	07	08	09	10	11	11	12	
Sales Increase	80	82	73	65	61	56	33	82	72	57	76	
Sales increase more than 20%	31	44	27	17	14	14	6	46	17	15	24	

(Note) Years are based on the financial year of each corporation.

(Table 2-2) Sales in 2011 (from the previous year)

Unit: No. of firms and (%)

Industry	Increase					No Change	Decrease				
	More than 20%	10-20%	Less than 10%				Less than 10%	10-20%	More than 20%		
Manufacture	Food	10 (71)	0 (0)	5 (36)	5 (36)	1 (7)	3 (21)	1 (7)	0 (0)	2 (14)	
	Textile	5 (63)	1 (13)	2 (25)	2 (25)	1 (13)	2 (25)	1 (13)	1 (13)	0 (0)	
	Chemical	12 (50)	2 (8)	6 (25)	4 (17)	3 (13)	9 (38)	4 (17)	3 (13)	2 (8)	
	Steel/non-ferrous metal	13 (48)	2 (7)	4 (15)	7 (26)	6 (22)	8 (30)	3 (11)	4 (15)	1 (4)	
	General machinery	10 (71)	6 (43)	1 (7)	3 (21)	0 (0)	4 (29)	1 (7)	1 (7)	2 (14)	
	Electric/electronics machinery	16 (46)	2 (6)	6 (17)	8 (23)	1 (3)	18 (51)	5 (14)	2 (6)	11 (31)	
	Transportation machinery	18 (32)	3 (5)	4 (7)	11 (19)	4 (7)	35 (61)	15 (26)	15 (26)	5 (9)	
	Others	17 (45)	3 (8)	10 (26)	4 (11)	4 (11)	17 (45)	6 (16)	5 (13)	6 (16)	
	Manufacturing sector total	101 (47)	19 (9)	38 (18)	44 (20)	20 (9)	96 (44)	36 (17)	31 (14)	29 (13)	
Non-manufacture	Trading	38 (72)	12 (23)	13 (25)	13 (25)	3 (6)	12 (23)	4 (8)	3 (6)	5 (9)	
	Retailer	10 (91)	1 (9)	6 (55)	3 (27)	1 (9)	0 (0)	0 (0)	0 (0)	0 (0)	
	Finance/insurance/securities	12 (86)	3 (21)	5 (36)	4 (29)	2 (14)	0 (0)	0 (0)	0 (0)	0 (0)	
	Construction/civil engineering	16 (89)	11 (61)	3 (17)	2 (11)	1 (6)	1 (6)	0 (0)	0 (0)	1 (6)	
	Transportation/communication	9 (41)	1 (5)	3 (14)	5 (23)	2 (9)	11 (50)	5 (23)	1 (5)	5 (23)	
	Others	18 (75)	8 (33)	5 (21)	5 (21)	5 (21)	1 (4)	1 (4)	0 (0)	0 (0)	
	Non-manufacturing sector total	103 (73)	36 (25)	35 (25)	32 (23)	14 (10)	25 (18)	10 (7)	4 (3)	11 (8)	
Total	204 (57)	55 (15)	73 (20)	76 (21)	34 (9)	121 (34)	46 (13)	35 (10)	40 (11)		

(Table 2-3) Sales forecast in 2012 (from the previous year)

Unit: No. of firms and (%)

Industry	Increase			No change	Decrease					
	More than 20%	10-20%	Less than 10%		Less than 10%	10-20%	More than 20%			
Manufacture	Food	9 (64)	2 (14)	4 (29)	3 (21)	1 (7)	4 (29)	3 (21)	0 (0)	1 (7)
	Textile	3 (43)	0 (0)	2 (29)	1 (14)	1 (14)	3 (43)	1 (14)	0 (0)	2 (29)
	Chemical	17 (71)	8 (33)	4 (17)	5 (21)	4 (17)	3 (13)	3 (13)	0 (0)	0 (0)
	Steel/non-ferrous metal	21 (81)	8 (31)	8 (31)	5 (19)	4 (15)	1 (4)	1 (4)	0 (0)	0 (0)
	General machinery	12 (86)	6 (43)	3 (21)	3 (21)	0 (0)	2 (14)	1 (7)	0 (0)	1 (7)
	Electric/electronics machinery	18 (51)	5 (14)	8 (23)	5 (14)	2 (6)	15 (43)	4 (11)	2 (6)	9 (26)
	Transportation machinery	49 (88)	23 (41)	16 (29)	10 (18)	2 (4)	5 (9)	2 (4)	3 (5)	0 (0)
	Others	23 (62)	5 (14)	10 (27)	8 (22)	5 (14)	9 (24)	5 (14)	0 (0)	4 (11)
	Manufacturing sector total	152 (71)	57 (27)	55 (26)	40 (19)	19 (9)	42 (20)	20 (9)	5 (2)	17 (8)
Non-manufacture	Trading	43 (81)	12 (23)	15 (28)	16 (30)	3 (6)	7 (13)	1 (2)	2 (4)	4 (8)
	Retailer	11 (100)	1 (9)	5 (45)	5 (45)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
	Finance/insurance/securities	11 (79)	3 (21)	3 (21)	5 (36)	2 (14)	1 (7)	1 (7)	0 (0)	0 (0)
	Construction/civil engineering	16 (94)	4 (24)	9 (53)	3 (18)	0 (0)	1 (6)	0 (0)	0 (0)	1 (6)
	Transportation/communication	18 (82)	2 (9)	8 (36)	8 (36)	0 (0)	4 (18)	1 (5)	2 (9)	1 (5)
	Others	18 (75)	7 (29)	7 (29)	4 (17)	6 (25)	0 (0)	0 (0)	0 (0)	0 (0)
	Non-manufacturing sector total	117 (83)	29 (21)	47 (33)	41 (29)	11 (8)	13 (9)	3 (2)	4 (3)	6 (4)
Total	269 (76)	86 (24)	102 (29)	81 (23)	30 (8)	55 (16)	23 (6)	9 (3)	23 (6)	

3. NET PROFIT/LOSS

The firms reporting the “profit” in their 2011 before tax profit/loss accounted for 75 percent. The firms reporting an “increase” in their net profit (including the case that their loss will diminish or vanish) accounted for 33 percent, whereas those reporting a “decrease” in their net profit accounted for 51 percent. (Table 3-1)

The percentage of the firms anticipating the “profit” in their 2012 before tax profit/loss accounted for 82 percent. The firms anticipating an “increase” in their net profit accounted for 55 percent, whereas those anticipating a “decrease” in their net profit accounted for 21 percent. (Table 3-2)

(Table 3-1) Result of before tax profit/loss in 2011 (from the previous year)

Unit: No. of firms and (%)

Industry		Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease
Manufacture	Food	9 (64)	2 (14)	3 (21)	14	7 (50)	2 (14)	5 (36)
	Textile	5 (63)	0 (0)	3 (38)	8	5 (63)	0 (0)	3 (38)
	Chemical	20 (83)	2 (8)	2 (8)	24	4 (17)	5 (21)	15 (63)
	Steel/non-ferrous metal	20 (74)	0 (0)	7 (26)	27	4 (15)	4 (15)	19 (70)
	General machinery	11 (79)	1 (7)	2 (14)	14	9 (64)	0 (0)	5 (36)
	Electric/electronics machinery	20 (57)	2 (6)	13 (37)	35	7 (20)	5 (14)	23 (66)
	Transportation machinery	44 (77)	9 (16)	4 (7)	57	4 (7)	10 (18)	43 (75)
	Others	28 (74)	3 (8)	7 (18)	38	13 (34)	6 (16)	19 (50)
	Manufacturing sector total	157 (72)	19 (9)	41 (19)	217	53 (24)	32 (15)	132 (61)
Non-manufacture	Trading	37 (70)	3 (6)	13 (25)	53	21 (40)	11 (21)	21 (40)
	Retailer	11 (100)	0 (0)	0 (0)	11	7 (64)	4 (36)	0 (0)
	Finance/insurance/securities	11 (79)	1 (7)	2 (14)	14	6 (43)	0 (0)	8 (57)
	Construction/civil engineering	17 (94)	1 (6)	0 (0)	18	13 (72)	2 (11)	3 (17)
	Transportation/communication	18 (78)	1 (4)	4 (17)	23	7 (30)	3 (13)	13 (57)
	Others	19 (79)	2 (8)	3 (13)	24	11 (46)	8 (33)	5 (21)
	Non-manufacturing sector total	113 (79)	8 (6)	22 (15)	143	65 (45)	28 (20)	50 (35)
Total	270 (75)	27 (8)	63 (18)	360	118 (33)	60 (17)	182 (51)	

(Note)

1. Profit increase indicates either of expanding profit, turning to the black, diminishing loss, or moving up to the break-even-point.
2. No change indicates either of remaining at the same level as before regardless of the black, the break-even-point, or the red.
3. Profit decrease indicates either of diminishing profit, falling into the red, expanding loss, or moving down to the break-even-point.

(Table 3-2) Forecast for before tax profit/loss in 2012 (from the previous year)

		Unit: No. of firms and (%)						
Industry	Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease	
Manufacture	Food	8 (57)	5 (36)	1 (7)	14	4 (29)	5 (36)	5 (36)
	Textile	6 (75)	0 (0)	2 (25)	8	4 (50)	2 (25)	2 (25)
	Chemical	21 (88)	3 (13)	0 (0)	24	12 (50)	7 (29)	5 (21)
	Steel/non-ferrous metal	21 (81)	3 (12)	2 (8)	26	18 (69)	5 (19)	3 (12)
	General machinery	12 (86)	2 (14)	0 (0)	14	10 (71)	3 (21)	1 (7)
	Electric/electronics machinery	21 (60)	4 (11)	10 (29)	35	10 (29)	11 (31)	14 (40)
	Transportation machinery	51 (89)	2 (4)	4 (7)	57	39 (68)	11 (19)	7 (12)
	Others	27 (73)	6 (16)	4 (11)	37	19 (51)	8 (22)	10 (27)
Manufacturing sector total		167 (78)	25 (12)	23 (11)	215	116 (54)	52 (24)	47 (22)
Non-manufacture	Trading	46 (87)	4 (8)	3 (6)	53	33 (62)	13 (25)	7 (13)
	Retailer	11 (100)	0 (0)	0 (0)	11	6 (55)	1 (9)	4 (36)
	Finance/insurance/securities	11 (79)	1 (7)	2 (14)	14	8 (57)	1 (7)	5 (36)
	Construction/civil engineering	17 (94)	1 (6)	0 (0)	18	10 (56)	6 (33)	2 (11)
	Transportation/communication	19 (86)	2 (9)	1 (5)	22	10 (45)	6 (27)	6 (27)
	Others	20 (83)	3 (13)	1 (4)	24	12 (50)	9 (38)	3 (13)
Non-manufacturing sector total		124 (87)	11 (8)	7 (5)	142	79 (56)	36 (25)	27 (19)
Total		291 (82)	36 (10)	30 (8)	357	195 (55)	88 (25)	74 (21)

(Note) See table 3-1.

4. CAPITAL INVESTMENT (MANUFACTURING SECTOR)

The amount of planned capital investment (in the manufacturing sector) in 2012 plans to increase by 32.4 percent from 2011. In terms of the number of firms, reporting “increase” (108) is larger than “decrease” (40). (The total number of responding firms is 213.) (Table 4-1)

The predominant reason for capital investment was “replacement” in both 2011 and 2012 while there are the firms responding “flood recovery.” (Table 4-2 and Table 4-3)

(Table 4-1) Actual capital investment in 2011 and planned capital investment in 2012 (manufacturing sector)

Unit: million baht and (%)

Industry	2011	2012		No. of firms				
	Amount	Amount	Increase %	Increase	No change	Decrease	Undecided	Total
Food	5,933	7,186	21.1	6 (43)	4 (29)	2 (14)	2 (14)	14
Textile	547	2,439	346.0	3 (38)	3 (38)	2 (25)	0 (0)	8
Chemical	2,740	3,827	39.7	12 (50)	5 (21)	5 (21)	2 (8)	24
Steel/Non-ferrous metal	2,929	3,012	2.8	9 (36)	5 (20)	9 (36)	2 (8)	25
General machinery	198	544	174.5	7 (50)	3 (21)	2 (14)	2 (14)	14
Electric/Electronics machinery	15,945	16,810	5.4	18 (53)	7 (21)	5 (15)	4 (12)	34
Transportation machinery	29,047	41,686	43.5	34 (60)	13 (23)	9 (16)	1 (2)	57
Others	3,457	4,961	43.5	19 (51)	8 (22)	6 (16)	4 (11)	37
Manufacturing sector total	60,795	80,465	32.4	108 (51)	48 (23)	40 (19)	17 (8)	213

(Note) The figures in the above table show just totaling the data from corporations responding the questionnaire. The capital-investment amount in the above does not equal to that of the Japanese corporations as a whole.

(Table 4-2) Details on actual capital investment in 2011 (check all that apply)

Unit: No. of firms and (%)

Industry	New	Expansion	Replacement	Streamlining	Flood recovery	Others	Total	Respond
	Food	5 (42)	6 (50)	8 (67)	1 (8)	2 (17)	0 (0)	22
Textile	3 (38)	1 (13)	6 (75)	3 (38)	0 (0)	0 (0)	13	8
Chemical	3 (13)	11 (46)	11 (46)	4 (17)	2 (8)	1 (4)	32	24
Steel/Non-ferrous metal	9 (33)	10 (37)	13 (48)	6 (22)	1 (4)	3 (11)	42	27
General machinery	4 (40)	3 (30)	8 (80)	2 (20)	1 (10)	0 (0)	18	10
Electric/Electronics machinery	13 (38)	16 (47)	14 (41)	10 (29)	7 (21)	0 (0)	60	34
Transportation machinery	31 (56)	29 (53)	23 (42)	18 (33)	6 (11)	2 (4)	109	55
Others	14 (38)	11 (30)	14 (38)	6 (16)	5 (14)	1 (3)	51	37
Manufacturing sector total	82 (40)	87 (42)	97 (47)	50 (24)	24 (12)	7 (3)	347	207

(Table 4-3) Details on planned capital investment in 2012 (check all that apply)

Unit: No. of firms and (%)

Industry	New	Expansion	Replacement	Streamlining	Flood recovery	Others	Total	Respond
	Food	6 (50)	6 (50)	6 (50)	3 (25)	1 (8)	1 (8)	23
Textile	3 (38)	1 (13)	7 (88)	1 (13)	2 (25)	1 (13)	15	8
Chemical	4 (17)	8 (33)	11 (46)	8 (33)	1 (4)	0 (0)	32	24
Steel/Non-ferrous metal	5 (20)	9 (36)	13 (52)	9 (36)	2 (8)	0 (0)	38	25
General machinery	5 (42)	3 (25)	5 (42)	2 (17)	3 (25)	0 (0)	18	12
Electric/Electronics machinery	7 (20)	15 (43)	11 (31)	12 (34)	15 (43)	1 (3)	61	35
Transportation machinery	31 (56)	32 (58)	28 (51)	21 (38)	7 (13)	2 (4)	121	55
Others	12 (34)	12 (34)	12 (34)	10 (29)	9 (26)	1 (3)	56	35
Manufacturing sector total	73 (35)	86 (42)	93 (45)	66 (32)	40 (19)	6 (3)	364	206

5. EXPORT TREND

The percentage of the firms reporting an “increase” in their export accounted for 36 percent in the first half of 2011 and 33 percent in the second half of 2011. (Table 5-1 and Table 5-2)

(Table 5-1) Export in 2011 (the first half)

Unit: No. of firms and (%)

Industry	The first half of 2011										
	Increase			No Change	Decrease			Total			
	More than 20% increase	10-20% increase	Less than 10% increase		Less than 10% decrease	10-20% decrease	More than 20% decrease				
Food	4 (31)	1 (8)	2 (15)	1 (8)	6 (46)	3 (23)	3 (23)	0 (0)	0 (0)	0 (0)	13
Textile	5 (63)	2 (25)	0 (0)	3 (38)	3 (38)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	8
Chemical	7 (29)	1 (4)	4 (17)	2 (8)	12 (50)	5 (21)	1 (4)	3 (13)	1 (4)	1 (4)	24
Steel/Non-ferrous metal	4 (20)	0 (0)	3 (15)	1 (5)	13 (65)	3 (15)	1 (5)	2 (10)	0 (0)	0 (0)	20
General machinery	3 (23)	0 (0)	0 (0)	3 (23)	10 (77)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	13
Electric/Electronics machinery	18 (56)	3 (9)	7 (22)	8 (25)	8 (25)	6 (19)	5 (16)	1 (3)	0 (0)	0 (0)	32
Transportation machinery	11 (21)	1 (2)	7 (13)	3 (6)	28 (53)	14 (26)	7 (13)	6 (11)	1 (2)	1 (2)	53
Others	17 (52)	5 (15)	4 (12)	8 (24)	9 (27)	7 (21)	1 (3)	4 (12)	2 (6)	2 (6)	33
Manufacturing sector total	69 (35)	13 (7)	27 (14)	29 (15)	89 (45)	38 (19)	18 (9)	16 (8)	4 (2)	4 (2)	196
Trading	21 (47)	3 (7)	9 (20)	9 (20)	21 (47)	3 (7)	1 (2)	1 (2)	1 (2)	1 (2)	45
Retailer	0 (0)	0 (0)	0 (0)	0 (0)	3 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3
Construction	0 (0)	0 (0)	0 (0)	0 (0)	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
Others	0 (0)	0 (0)	0 (0)	0 (0)	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
Non-manufacturing sector total	21 (41)	3 (6)	9 (18)	9 (18)	27 (53)	3 (6)	1 (2)	1 (2)	1 (2)	1 (2)	51
Total	90 (36)	16 (6)	36 (15)	38 (15)	116 (47)	41 (17)	19 (8)	17 (7)	5 (2)	5 (2)	247

(Table 5-2) Export in 2011 (the second half)

Unit: No. of firms and (%)

Industry	The second half of 2011										
	Increase			No Change	Decrease			Total			
	More than 20% increase	10-20% increase	Less than 10% increase		Less than 10% decrease	10-20% decrease	More than 20% decrease				
Food	6 (46)	3 (23)	3 (23)	0 (0)	2 (15)	5 (38)	4 (31)	1 (8)	0 (0)	0 (0)	13
Textile	5 (63)	1 (13)	0 (0)	4 (50)	3 (38)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	8
Chemical	11 (46)	2 (8)	4 (17)	5 (21)	9 (38)	4 (17)	2 (8)	1 (4)	1 (4)	1 (4)	24
Steel/Non-ferrous metal	4 (20)	0 (0)	0 (0)	4 (20)	14 (70)	2 (10)	1 (5)	1 (5)	0 (0)	0 (0)	20
General machinery	4 (31)	1 (8)	0 (0)	3 (23)	7 (54)	2 (15)	1 (8)	0 (0)	1 (8)	1 (8)	13
Electric/Electronics machinery	9 (27)	0 (0)	5 (15)	4 (12)	4 (12)	20 (61)	3 (9)	0 (0)	17 (52)	17 (52)	33
Transportation machinery	14 (27)	2 (4)	7 (14)	5 (10)	26 (51)	11 (22)	2 (4)	6 (12)	3 (6)	3 (6)	51
Others	12 (36)	4 (12)	4 (12)	4 (12)	10 (30)	11 (33)	2 (6)	3 (9)	6 (18)	6 (18)	33
Manufacturing sector total	65 (33)	13 (7)	23 (12)	29 (15)	75 (38)	55 (28)	15 (8)	12 (6)	28 (14)	28 (14)	195
Trading	17 (39)	4 (9)	6 (14)	7 (16)	20 (45)	7 (16)	0 (0)	2 (5)	5 (11)	5 (11)	44
Retailer	0 (0)	0 (0)	0 (0)	0 (0)	3 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3
Construction	0 (0)	0 (0)	0 (0)	0 (0)	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
Others	0 (0)	0 (0)	0 (0)	0 (0)	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
Non-manufacturing sector total	17 (34)	4 (8)	6 (12)	7 (14)	26 (52)	7 (14)	0 (0)	2 (4)	5 (10)	5 (10)	50
Total	82 (33)	17 (7)	29 (12)	36 (15)	101 (41)	62 (25)	15 (6)	14 (6)	33 (13)	33 (13)	245

6. PROSPECTIVE MARKET IN THE FUTURE

For the prospective market in the future (check all that apply), the predominant response was “Japan” (46 percent), followed by “Indonesia” (44 percent), “India” (29 percent) and “Vietnam” (28 percent), and “Myanmar” was 6th. (Table 6)

(Table 6) Prospective market in the future (check all that apply)

Industry		Unit: No. of firms																Total	No. of firms	
		Japan	Indonesia	India	Vietnam	China	Myanmar	USA	Malaysia	Singapore	Cambodia	Europe	Laos	Middle East	Latin America	Oceania	Philippines			Others
Manufacture	Food	7 (58)	3 (25)	2 (17)	4 (33)	3 (25)	4 (33)	3 (25)	2 (17)	2 (17)	3 (25)	4 (33)	1 (8)	3 (25)	1 (8)	2 (17)	1 (8)	0 (0)	39	12
	Textile	5 (63)	1 (13)	0 (0)	2 (25)	4 (50)	1 (13)	3 (38)	1 (13)	1 (13)	0 (0)	2 (25)	0 (0)	0 (0)	1 (13)	0 (0)	0 (0)	0 (0)	20	8
	Chemical	7 (30)	13(57)	10(43)	10(43)	3 (13)	3 (13)	1 (4)	4 (17)	2 (9)	1 (4)	1 (4)	2 (9)	2 (9)	1 (4)	3 (13)	3 (13)	1 (4)	61	23
	Steel/ non-ferrous metal	9 (38)	13(54)	8 (33)	9 (38)	5 (21)	2 (8)	0 (0)	1 (4)	0 (0)	3 (13)	2 (8)	0 (0)	0 (0)	1 (4)	1 (4)	0 (0)	3 (13)	54	24
	General machinery	2 (15)	8 (62)	4 (31)	7 (54)	1 (8)	1 (8)	0 (0)	4 (31)	0 (0)	1(8)	0(0)	1 (8)	0 (0)	1 (8)	0 (0)	1 (8)	3 (23)	32	13
	Electric/ electronics machinery	24 (69)	15(43)	12(34)	6 (17)	13(37)	6 (17)	8 (23)	6 (17)	12 (34)	3 (9)	7 (20)	2 (6)	5 (14)	3 (9)	2 (6)	3 (9)	1 (3)	110	35
	Transportation machinery	22 (42)	33 (63)	19(37)	11 (21)	11(21)	5 (10)	8 (15)	8 (15)	1 (2)	5 (10)	5 (10)	3 (6)	4 (8)	7 (13)	3 (6)	3 (6)	2 (4)	141	52
	Others	12 (41)	10(34)	10(34)	9 (31)	8 (28)	5 (17)	7 (24)	6 (21)	3 (10)	7 (24)	4 (14)	5 (17)	6 (21)	4 (14)	2 (7)	0 (0)	1 (3)	89	29
	Manufacturing sector total		88 (45)	96(49)	65(33)	58(30)	48(24)	27(14)	30(14)	32(16)	21(11)	23(12)	25(13)	14(7)	20(10)	19(10)	13(7)	11(6)	11(6)	546
Non-manufacture	Trading	19 (38)	22(44)	12(24)	14(28)	11(22)	15(30)	4 (8)	3 (6)	6 (12)	9 (18)	2 (4)	6 (12)	0 (0)	0 (0)	1 (2)	1 (2)	3 (6)	112	50
	Retailer	1 (33)	1 (33)	0 (0)	1 (33)	1 (33)	0 (0)	0 (0)	0 (0)	1 (33)	0 (0)	0 (0)	0 (0)	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	5	3
	Construction	1 (50)	0 (0)	0 (0)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2	2
	Others	16(80)	1 (5)	2 (10)	1 (5)	5 (25)	3 (15)	3 (15)	0 (0)	6 (30)	2 (10)	0 (0)	1 (5)	0 (0)	0 (0)	0 (0)	1 (5)	2 (10)	34	20
	Non-manufacturing sector total		37(49)	24(32)	14(19)	17(23)	17(23)	18(24)	7 (9)	3 (4)	14(19)	11(15)	2 (3)	7 (9)	1 (1)	0 (0)	1 (1)	2 (3)	5 (7)	153
Total		125(46)	120(44)	79(29)	75(28)	65(24)	45(17)	37(14)	35(13)	35(13)	34(13)	27(10)	21(8)	21(8)	19(7)	14(5)	13(5)	16(6)	699	271
This time		1	2	3	4	5	6	7	8	8	10	11	12	12	14	15	16	-		
Previous time		5	2	1	3	4	-	10	7	14	-	6	-	8	11	12	12	-		

(Note)

1. Europe includes Russia.
2. Some items have been changed. The ranks in the previous survey are shown only for those included in the previous survey (spring of 2011).
3. The 9th rank in the previous survey was CLM (Cambodia, Laos, and Myanmar).

(Ref) Ratio of firms by industry answered “Japan”

Industry		Unit: No. of firms	
		This time	Previous time
Manufacture	Food	7 (58)	4 (24)
	Textile	5 (63)	6 (50)
	Chemical	7 (30)	1 (3)
	Steel/ non-ferrous metal	9 (38)	1 (4)
	General machinery	2 (15)	1 (8)
	Electric/ electronics machinery	24 (69)	8 (21)
	Transportation machinery	22 (42)	10 (24)
	Others	12 (41)	7 (23)
	Manufacturing sector total		88 (45)
Non-manufacture	Trading	19 (38)	6 (17)
	Retailer	1 (33)	0 (0)
	Construction	1 (50)	0 (0)
	Others	16 (80)	0 (0)
	Non-manufacturing sector total		37 (49)
Total		125 (46)	44 (18)

7. EXCHANGE RATE USED IN BUSINESS PLAN

(1) Thai baht / US dollar

With reference to the exchange rate used in business plan (Thai baht / US dollar), the predominant response was “not less than 30.0 but less than 30.5” (37.9 percent), followed by “not less than 31.0 but less than 31.5” (23.6 percent). (Table 7-1)

(Table 7-1) Exchange rate used in business plan (Thai baht / US dollar)

Unit: Thai baht / US dollar, No. of firms and (%)

Thai baht / US dollar	Manufacture									Non-manufacture				Grand total	
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total		
Not less than 28.0 but less than 28.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 28.5 but less than 29.0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 29.0 but less than 29.5	0	1	0	0	0	0	1	1	3	0	0	0	0	3	3 (1.5)
Not less than 29.5 but less than 30.0	0	1	0	0	0	2	4	2	9	1	0	0	1	10	10 (5.1)
Not less than 30.0 but less than 30.5	6	1	7	5	4	12	10	10	55	16	0	3	19	74	74 (37.9)
Not less than 30.5 but less than 31.0	2	2	1	2	0	7	8	3	25	2	0	0	2	27	27 (13.8)
Not less than 31.0 but less than 31.5	2	2	7	7	2	2	6	6	34	11	0	1	12	46	46 (23.6)
Not less than 31.5 but less than 32.0	1	0	1	2	0	4	0	0	8	4	0	0	4	12	12 (6.2)
Not less than 32.0 but less than 32.5	0	0	2	0	1	2	2	2	9	1	0	0	1	10	10 (5.1)
Not less than 32.5 but less than 33.0	0	0	0	0	0	1	0	1	2	0	0	0	0	2	2 (1.0)
Not less than 33.0 but less than 33.5	0	0	0	1	0	0	1	1	3	2	0	0	2	5	5 (2.6)
Not less than 33.5 but less than 34.0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 34.0 but less than 34.5	0	0	0	1	0	0	0	1	2	1	0	0	1	3	3 (1.5)
Not less than 34.5 but less than 35.0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 35.0 but less than 35.5	0	0	0	1	0	0	1	0	2	0	0	0	0	2	2 (1.0)
Not less than 35.5 but less than 36.0	0	0	0	0	0	0	0	0	0	1	0	0	1	1	1 (0.5)
No. of firms	11	7	18	19	7	30	33	27	152	39	0	4	43	195	

Average	30.43	30.24	30.72	31.27	30.61	30.62	30.64	30.73	30.71	30.94	-	30.25	30.87	30.74
Median	30.00	30.50	31.00	31.00	30.00	30.50	30.50	30.50	30.50	31.00	-	30.00	30.65	30.50
Mode	30.00	31.00	31.00	31.00	30.00	30.00	30.00	30.00	30.00	30.00	-	30.00	30.00	30.00

(Note) The median indicates the value located at the center of distribution to exclude deviation due to the number of respondents or the lowest/ highest value as much as possible.

(At the time of the previous survey)

	Manufacture									Non-manufacture				Grand total
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total	

Average	30.18	29.52	32.46	30.65	30.78	30.05	30.54	32.29	30.96	30.47	30.65	30.40	30.47	30.87
Median	30.00	29.25	30.00	30.25	30.00	30.00	30.00	30.20	30.00	30.00	30.65	30.00	30.00	30.00
Mode	30.00	29.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	#N/A	30.00	30.00	30.00

(Note) The median indicates the value located at the center of distribution to exclude deviation due to the number of respondents or the lowest/ highest value as much as possible. The mode indicates the value that has the largest number of respondents. If there are more than one values that has the largest number of respondents, “#N/A” (not applicable) is described.

(2) Japanese yen / Thai baht

With reference to the exchange rate used in business plan (Japanese yen / Thai baht), the predominant response was “not less than 2.5 but less than 2.6” (45.9 percent), followed by “not less than 2.6 but less than 2.7” (27.6 percent). (Table 7-2)

(Table 7-2) Exchange rate used in business plan (Japanese yen / Thai baht)

Unit: Japanese yen / Thai baht, No. of firms and (%)

	Manufacture									Non-manufacture				Grand total
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total	
Not less than 2.1 but less than 2.2	0	0	0	0	0	0	1	0	1	0	0	0	0	1 (0.5)
Not less than 2.2 but less than 2.3	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 2.3 but less than 2.4	0	1	0	0	0	1	0	0	2	1	0	0	1	3 (1.6)
Not less than 2.4 but less than 2.5	1	1	2	2	3	6	5	3	23	4	0	0	4	27 (14.6)
Not less than 2.5 but less than 2.6	2	2	7	6	3	14	17	11	62	21	1	1	23	85 (45.9)
Not less than 2.6 but less than 2.7	1	0	4	6	3	4	11	5	34	13	1	3	17	51 (27.6)
Not less than 2.7 but less than 2.8	1	0	5	1	1	3	6	5	22	3	0	3	6	28 (15.1)
Not less than 2.8 but less than 2.9	4	0	0	1	2	1	0	4	12	1	0	0	1	13 (7.0)
Not less than 2.9 but less than 3.0	0	0	0	0	0	1	0	0	1	0	0	0	0	1 (0.5)
Not less than 3.0 but less than 3.1	1	0	0	1	0	1	1	1	5	2	0	0	2	7 (3.8)
No. of firms	9	2	16	15	9	24	35	26	136	40	2	7	49	185

Average	2.71	2.44	2.58	2.60	2.58	2.56	2.56	2.61	2.58	2.57	2.60	2.64	2.58	2.58
Median	2.75	2.48	2.55	2.60	2.55	2.50	2.56	2.60	2.55	2.50	2.60	2.60	2.52	2.54
Mode	2.80	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	2.50	#N/A	2.60	2.50	2.50

(Note) The median indicates the value located at the center of distribution to exclude deviation due to the number of respondents or the lowest/ highest value as much as possible. The mode indicates the value that has the largest number of respondents. If there are more than one values that has the largest number of respondents, “#N/A” (not applicable) is described.

(At the time of the previous survey)

	Manufacture									Non-manufacture				Grand total
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total	

Average	2.79	2.74	2.77	2.74	2.72	2.66	2.72	2.76	2.73	2.71	2.65	2.72	2.71	2.73
Median	2.80	2.83	2.75	2.73	2.76	2.70	2.70	2.75	2.74	2.70	2.65	2.70	2.70	2.70
Mode	2.70	2.90	2.70	2.80	2.80	2.70	2.70	2.70	2.70	2.70	#N/A	2.70	2.70	2.70

(Note) The median indicates the value located at the center of distribution to exclude deviation due to the number of respondents or the lowest/ highest value as much as possible. The mode indicates the value that has the largest number of respondents. If there are more than one values that has the largest number of respondents, “#N/A” (not applicable) is described.

8. PROCUREMENT DESTINATION OF PARTS/ MATERIAL

The ratio of procurement destination in 2011 (simple average of respondents) was 56.7 percent for ASEAN, including 48.0 percent for Thailand. (Table 8-1)

Regarding the ratio of planned procurement destination in 2012, the percentage of ASEAN is expected to be 57.2 percent, including 47.8 percent for Thailand. (Table 8-2)

(Table 8-1) Suppliers of parts and materials in 2011

Industry		ASEAN			Japan	China	Others	Total	No. of firms
		Thailand	ASEAN (except Thailand)						
Manufacturing sector	Food	76.1	69.0	7.1	8.2	4.3	11.5	100.0	12
	Textile	58.8	53.1	5.6	8.1	6.9	26.3	100.0	8
	Chemical	55.3	47.8	7.5	33.4	1.6	9.6	100.0	22
	Steel/Non-ferrous metal	36.6	32.7	3.9	51.6	4.4	7.4	100.0	26
	General machinery	56.9	45.5	11.4	33.6	6.2	3.3	100.0	13
	Electric/Electronics machinery	62.8	52.9	9.8	29.0	6.1	2.2	100.0	29
	Transportation machinery	58.7	54.5	4.2	37.3	1.8	2.2	100.0	52
	Others	51.6	46.9	4.7	36.2	5.0	7.2	100.0	32
	Manufacturing average	57.1	50.3	6.8	29.7	4.5	8.7	100.0	194
Non-manufacture	Trading	53.6	36.8	16.8	40.1	4.4	1.8	100.0	45
	Retailer	50.0	50.0	0.0	50.0	0.0	0.0	100.0	2
	Construction	80.0	80.0	0.0	20.0	0.0	0.0	100.0	1
	Others	42.0	16.0	26.0	44.0	10.0	4.0	100.0	2
	Non-manufacturing average	56.4	45.7	10.7	38.5	3.6	1.5	100.0	50
Total		56.7	48.0	8.7	34.1	4.1	5.1	100.0	244

(Note) The ratio indicates the simple average of those of respondents.

(Table 8-2) Planned suppliers of parts and materials in 2012

Industry		ASEAN			Japan	China	Others	Total	No. of firms
		Thailand	ASEAN (except Thailand)						
Manufacturing sector	Food	76.9	69.8	7.1	7.3	4.3	11.5	100.0	12
	Textile	56.9	45.6	11.3	10.0	6.9	26.3	100.0	8
	Chemical	57.0	49.2	7.8	32.1	1.5	9.4	100.0	21
	Steel/Non-ferrous metal	38.5	34.2	4.3	48.9	4.9	7.7	100.0	26
	General machinery	59.9	48.2	11.7	28.9	7.1	4.1	100.0	13
	Electric/Electronics machinery	60.9	50.7	10.2	29.7	6.7	2.7	100.0	30
	Transportation machinery	59.4	55.3	4.1	34.8	2.0	3.8	100.0	50
	Others	52.3	47.3	5.0	33.9	5.7	8.1	100.0	30
	Manufacturing average	57.7	50.0	7.7	28.2	4.9	9.2	100.0	190
Non-manufacture	Trading	55.7	38.4	17.3	37.2	5.2	1.9	100.0	45
	Retailer	47.5	47.5	0.0	52.5	0.0	0.0	100.0	2
	Construction	80.0	80.0	0.0	20.0	0.0	0.0	100.0	1
	Others	43.5	16.0	27.5	40.0	10.0	6.5	100.0	2
	Non-manufacturing average	56.7	45.5	11.2	37.4	3.8	2.1	100.0	50
Total		57.2	47.8	9.4	32.8	4.3	5.6	100.0	240

(Note) See Table 8-1.

9. PROBLEMS WITH CORPORATE MANAGEMENT

Regarding problems with corporate management (check all that apply), the predominant response was “intensified competition with competitors (1st rank in the previous survey)” (59 percent), followed by “lack of human resources of manager-level” (50 percent) and “increase of total labor cost” (50 percent). (Table 9)

(Table 9) Problems with corporate management (check all that apply)

		Unit: No. of firms and (%)																	
Previous time	This time		Manufacture								Non-manufacture						Grand total		
			Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication		Others	Total
1	1	Intensified competition with competitors	6(43)	3(38)	14(58)	13(48)	10(71)	24(67)	35(60)	16(42)	121(55)	31(57)	8(73)	13(87)	12(67)	14(64)	15(63)	93(65)	214 (59)
4	2	Lack of human resources of manager-level	7(50)	3(38)	8(33)	12(44)	5(36)	16(44)	32(55)	17(45)	100(46)	24(44)	9(82)	6(40)	14(78)	16(73)	12(50)	81(56)	181 (50)
6	3	Increase of total labor cost	8(57)	6(75)	11(46)	19(70)	6(43)	20(56)	40(69)	21(55)	131(60)	15(28)	6(55)	2(13)	7(39)	10(45)	9(38)	49(34)	180 (50)
2	4	Decrease of selling price (price war)	6(43)	1(13)	12(50)	12(44)	9(64)	20(56)	32(55)	19(50)	111(51)	21(39)	2(18)	3(20)	6(33)	11(50)	7(29)	50(35)	161 (44)
3	5	Hike in material prices	11(79)	1(13)	21(88)	9(33)	8(57)	22(61)	28(48)	23(61)	123(56)	12(22)	4(36)	2(13)	9(50)	7(32)	2(8)	36(25)	159 (44)
5	6	Lack of human resources of workers/ staffs-level	7(50)	1(13)	4(17)	12(44)	5(36)	17(47)	23(40)	16(42)	85(39)	12(22)	5(45)	3(20)	11(61)	10(45)	7(29)	48(33)	133 (37)
7	7	Foreign exchange fluctuation	3(21)	4(50)	10(42)	9(33)	5(36)	16(44)	19(33)	17(45)	83(38)	27(50)	4(36)	2(13)	2(11)	5(23)	6(25)	46(32)	129 (36)
8	8	Job hopping of employee	3(21)	0(0)	1(4)	1(4)	3(21)	1(3)	9(16)	4(11)	22(10)	10(19)	2(18)	2(13)	5(28)	8(36)	6(25)	33(23)	55 (15)
9	9	Quality management	4(29)	2(25)	2(8)	6(22)	2(14)	3(8)	10(17)	4(11)	33(15)	1(2)	2(18)	1(7)	4(22)	3(14)	3(13)	14(10)	47 (13)
10	10	Changes in products/ users' needs	0(0)	1(13)	1(4)	0(0)	0(0)	3(8)	5(9)	3(8)	13(6)	5(9)	3(27)	1(7)	1(6)	5(23)	2(8)	17(12)	30 (8)
12	11	Excessive employment	0(0)	1(13)	1(4)	0(0)	0(0)	3(8)	7(12)	1(3)	13(6)	1(2)	0(0)	1(7)	0(0)	1(5)	0(0)	3(2)	16 (4)
11	12	Difficulty in collecting money from customers	0(0)	0(0)	1(4)	1(4)	0(0)	0(0)	0(0)	1(3)	3(1)	4(7)	0(0)	1(7)	1(6)	0(0)	0(0)	6(4)	9 (2)
13	13	Difficulty in obtaining financial support	1(7)	0(0)	0(0)	0(0)	0(0)	1(3)	0(0)	1(3)	3(1)	1(2)	0(0)	1(7)	1(6)	0(0)	0(0)	3(2)	6 (2)
14	14	Infringement of intellectual property rights	0(0)	0(0)	0(0)	0(0)	1(7)	0(0)	1(2)	0(0)	2(1)	0(0)	1(9)	0(0)	1(6)	0(0)	0(0)	2(1)	4 (1)
14	15	Excessive capital investment	0(0)	0(0)	0(0)	0(0)	0(0)	0(0)	1(2)	0(0)	1(0)	0(0)	0(0)	0(0)	0(0)	0(0)	0(0)	0(0)	1 (0)
-	-	Others	0(0)	0(0)	0(0)	0(0)	0(0)	0(0)	0(0)	3(8)	3(1)	1(2)	1(9)	1(7)	0(0)	0(0)	1(4)	4(3)	7 (2)
Total			56	23	86	94	54	146	242	146	847	165	47	39	74	90	70	485	1,332
No. of firms			14	8	24	27	14	36	58	38	219	54	11	15	18	22	24	144	363 (100)

10. REQUESTS TO THE THAI GOVERNMENT

Regarding the requests to the Thai government (check all that apply), the predominant response was “stabilization of political / security situation (1st rank in the previous survey)” (64 percent), followed by “development and implementation of customs-related system” (46 percent) and “implementation of tax-related system” (32 percent). (Table 10)

(Table 10) Requests to the Thai government (check all that apply)

Unit: Unit: No. of firms and (%)

Previous time	This time		Manufacture								Non-manufacture						Grand total		
			Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication		Others	Total
1	1	Stabilization of political / security situation	8 (57)	6 (75)	14(61)	21(75)	9(64)	26(72)	34(62)	22(58)	140(65)	35(66)	9(82)	10(71)	7 (41)	12(55)	17(68)	90(63)	230 (64)
2	2	Development and implementation of customs-related system	9 (64)	1 (13)	11(48)	16(57)	5 (36)	19(53)	31(56)	14(37)	106(49)	31(58)	4 (36)	0 (0)	4 (24)	15(68)	5 (20)	59(42)	165 (46)
5	3	Implementation of tax-related system	3 (21)	3 (38)	8 (35)	6 (21)	5 (36)	11(31)	16(29)	15(39)	67(31)	15(28)	4 (36)	4 (29)	12(71)	7 (32)	6 (24)	48(34)	115 (32)
3	4	Relaxation of the Foreign Business Act	5 (36)	1 (13)	5 (22)	1 (4)	3 (21)	5 (14)	14 (25)	9 (24)	43(20)	19(36)	4 (36)	7 (50)	6 (35)	12(55)	12(48)	60(42)	103 (29)
7	5	Infrastructure development in Bangkok metropolitan area	1 (7)	2 (25)	5 (22)	6 (21)	3 (21)	12 (33)	10(18)	11(29)	50(23)	14(26)	4 (36)	7(50)	4(24)	7 (32)	7 (28)	43(30)	93 (26)
3	6	Improvement of education/ human resource development	4 (29)	3 (38)	7 (30)	8 (29)	1 (7)	8 (22)	20(36)	7 (18)	58(27)	13(25)	3(27)	3 (21)	1 (6)	4 (18)	5 (20)	29(20)	87 (24)
6	7	Work permit/ visa-related issues	2 (14)	2 (25)	0 (0)	5 (18)	4 (29)	5 (14)	5 (9)	11(29)	34(16)	18(34)	1 (9)	5 (36)	14 (82)	5 (23)	7 (28)	50(35)	84 (23)
8	8	Prevention of labor disputes	2 (14)	0(0)	6(26)	9 (32)	0 (0)	11 (31)	23(42)	5 (13)	56(26)	2 (4)	0 (0)	0 (0)	0 (0)	2 (9)	1 (4)	5 (4)	61 (17)
11	9	Measures to prevent expansion of new-type or flu influenza	1 (7)	0(0)	1 (4)	2 (7)	1 (7)	2 (6)	3 (5)	3 (8)	13(6)	5 (9)	2 (18)	0 (0)	1 (6)	3 (14)	4 (16)	15(11)	28 (8)
9	10	Broad-based infrastructure development linking Thailand with neighboring countries	2 (14)	2 (25)	1 (4)	2 (7)	1 (7)	2 (6)	2 (4)	2 (5)	14(6)	5 (9)	0 (0)	2 (14)	0 (0)	4 (18)	1 (4)	12(8)	26 (7)
10	11	Promotion of regional operating headquarters function (e.g. ROH, IPC)	1 (7)	0(0)	0 (0)	0 (0)	1 (7)	5 (14)	4 (7)	0 (0)	11(5)	3 (6)	0 (0)	1 (7)	1 (6)	3 (14)	2 (8)	10(7)	21 (6)
-	-	Others	4 (29)	0(0)	1 (4)	2 (7)	3 (21)	5 (14)	2 (4)	1 (3)	18(8)	2 (4)	0 (0)	1 (7)	0 (0)	0 (0)	1 (4)	4 (3)	22 (6)
Total			42	20	59	78	36	111	164	100	610	162	31	40	50	74	68	425	1,035
No. of firms			14	8	23	28	14	36	55	38	216	53	11	14	17	22	25	142	358 (100)

11. IMPACTS OF THE 2011 THAILAND FLOODS

(1) Impacts of the 2011 Thailand floods on business operation

With reference to the impacts of the 2011 Thailand floods on business operation, the percentage of the firms responding “direct damage to buildings or facilities” was 19 percent, while that of the firms responding “indirect damage due to customers/suppliers affected” was 78 percent.

Of the firms responding “direct damage to buildings or facilities,” the percentages in the electric/ electronics machinery and general machinery industries amounted to 56 percent and 42 percent respectively. Many firms in all the industries reported “indirect damage due to customers/suppliers affected.” (Table 11-1)

(Table 11-1) Impacts of the 2011 Thailand floods on business operation

Industry		Direct damage to buildings or facilities			Indirect damage due to customers/suppliers affected	No impact in particular		No. of firms
			Within industrial estates	Outside industrial estates				
Manufacture	Food	4 (29)	2 (14)	2 (14)	11 (79)	3 (21)	14	
	Textile	3 (33)	1 (11)	2 (22)	5 (56)	2 (22)	9	
	Chemical	1 (4)	1 (4)	0 (0)	19 (79)	4 (17)	24	
	Steel/non-ferrous metal	2 (7)	1 (3)	1 (3)	24 (83)	3 (10)	29	
	General machinery	5 (42)	5 (42)	0 (0)	8 (67)	4 (33)	12	
	Electric/electronics machinery	20 (56)	18 (50)	3 (8)	31 (86)	2 (6)	36	
	Transportation machinery	7 (13)	6 (11)	1 (2)	47 (84)	8 (14)	56	
	Others	9 (24)	7 (18)	2 (5)	26 (68)	7 (18)	38	
Manufacturing sector total		51 (23)	41 (19)	11 (5)	171 (78)	33 (15)	218	
Non-manufacture	Trading	5 (11)	4 (9)	1 (2)	45 (100)	9 (20)	45	
	Retailer	3 (27)	3 (27)	2 (18)	8 (73)	3 (27)	11	
	Finance/insurance/securities	2 (13)	0 (0)	2 (13)	10 (63)	5 (31)	16	
	Construction/civil engineering	5 (29)	3 (18)	3 (18)	8 (47)	9 (53)	17	
	Transportation/communication	2 (9)	0 (0)	2 (9)	18 (78)	5 (22)	23	
	Others	1 (4)	0 (0)	1 (4)	15 (63)	12 (50)	24	
Non-manufacturing sector total		18 (13)	10 (7)	11 (8)	104 (76)	43 (32)	136	
Total		69 (19)	51 (14)	22 (6)	275 (78)	76 (21)	354	

(2) Damage insurance coverage

As for the damage insurance coverage (check all that apply), the predominant response was “property damage” (74 percent), followed by “property (e.g. products) in transit” (28 percent) and “liability” (19 percent).

The percentage of the firms responding “property damage” covered by insurances in the manufacturing sector (86 percent) is high, compared to the non-manufacturing sector. (Table 11-2)

(Table 11-2) Damage insurance coverage (check all that apply)

		Unit: No. of firms and (%)							
Industry		Property damage	Profit loss due to business suspension/interruption	Liability	Property (e.g. products) in transit	Others	Unknown	No. of firms	
Manufacture	Food	12 (86)	5 (36)	2 (14)	2 (14)	0 (0)	2 (14)	14	
	Textile	8 (100)	4 (50)	2 (25)	3 (38)	0 (0)	0 (0)	8	
	Chemical	21 (88)	5 (21)	4 (17)	8 (33)	0 (0)	3 (13)	24	
	Steel/non-ferrous metal	22 (85)	1 (4)	1 (4)	6 (23)	2 (8)	3 (12)	26	
	General machinery	7 (70)	1 (10)	2 (20)	1 (10)	1 (10)	2 (20)	10	
	Electric/electronics machinery	32 (91)	10 (29)	12 (34)	18 (51)	4 (11)	0 (0)	35	
	Transportation machinery	46 (87)	16 (30)	9 (17)	19 (36)	1 (2)	5 (9)	53	
	Others	29 (81)	5 (14)	7 (19)	11 (31)	4 (11)	2 (6)	36	
Manufacturing sector total		177 (86)	47 (23)	39 (19)	68 (33)	12 (6)	17 (8)	206	
Non-manufacture	Trading	27 (56)	2 (4)	10 (21)	17 (35)	3 (6)	6 (13)	48	
	Retailer	4 (57)	2 (29)	2 (29)	2 (29)	1 (14)	1 (14)	7	
	Finance/insurance/securities	8 (62)	1 (8)	0 (0)	0 (0)	0 (0)	4 (31)	13	
	Construction/civil engineering	7 (44)	0 (0)	6 (38)	2 (13)	4 (25)	2 (13)	16	
	Transportation/communication	15 (71)	0 (0)	3 (14)	3 (14)	1 (5)	5 (24)	21	
	Others	7 (37)	1 (5)	2 (11)	2 (11)	4 (21)	6 (32)	19	
Non-manufacturing sector total		68 (55)	6 (5)	23 (19)	26 (21)	13 (10)	24 (19)	124	
Total		245 (74)	53 (16)	62 (19)	94 (28)	25 (8)	41 (12)	330	

(3) Expected resumption of operation

For the expected resumption of operation (including partial operation) in manufacturing sector, the predominant response among firms directly affected was “December 2011” (25 percent), while a considerable amount of the firms require longer time till resumption, including “April to May 2012” (21 percent) and “June 2012 or later” (6 percent). (Table 11-3)

(Table 11-3) Expected resumption of operation

Unit: No. of firms and (%)

	Manufacture									Non-manufacture						Grand total	
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication	Others		Total
December 2011	1	1	1	1	0	5	1	2	12 (25)	4	3	2	3	1	1	14 (74)	26 (39)
January 2012	1	0	0	0	1	1	4	1	8 (17)	1	0	0	2	0	0	3 (16)	11 (16)
February 2012	0	0	0	0	2	4	1	0	7 (15)	0	0	0	0	0	0	0 (0)	7 (10)
March 2012	0	1	0	0	2	3	1	0	7 (15)	0	0	0	0	0	0	0 (0)	7 (10)
April to May 2012	0	1	1	1	0	3	0	4	10 (21)	1	0	0	0	1	0	2 (11)	12 (18)
June 2012 or later	1	0	1	0	0	1	0	0	3 (6)	0	0	0	0	0	0	0 (0)	3 (4)
Unforeseeable	1	0	0	0	0	0	0	0	1 (2)	0	0	0	0	0	0	0 (0)	1 (1)
Total	4	3	3	2	5	17	7	7	48 (100)	6	3	2	5	2	1	19 (100)	67 (100)

(Note) : Including partial operation

(4) Location of alternative production

As for the location of alternative production (check all that apply), the percentages of the firms responding “within Thailand” and “outside Thailand” among those directly affected in the manufacturing sector were 43 percent and 61 percent respectively. In terms of countries, the predominant response was “Japan” (55 percent). The number of the firms responding “Japan” is high especially in the electric/ electronics industry. (Table 11-4-1)

Among firms indirectly affected in the manufacturing sector, the percentages of the firms responding “within Thailand” and “outside Thailand” were 27 percent and 37 percent respectively. In terms of countries, the predominant response was “Japan” (30 percent). The number of the firms responding “Japan” is high especially in the transportation machinery industry. (Table 11-4-2)

(Table 11-4-1) Location of alternative production (check all that apply)

[Firms directly affected]		Unit: No. of firms and (%)							
Industry	Within Thailand	Outside Thailand					No alternative production	No. of firms	
			ASEAN	China	Japan	Others			
Manufacture	Food	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4 (100)	4
	Textile	2 (67)	2 (67)	2 (67)	0 (0)	1 (33)	0 (0)	0 (0)	3
	Chemical	1 (100)	1 (100)	0 (0)	0 (0)	1 (100)	0 (0)	0 (0)	1
	Steel/non-ferrous metal	2 (100)	1 (50)	0 (0)	0 (0)	1 (50)	0 (0)	0 (0)	2
	General machinery	3 (60)	3 (60)	1 (20)	2 (40)	3 (60)	0 (0)	0 (0)	5
	Electric/electronics machinery	8 (44)	13 (72)	4 (22)	4 (22)	12 (67)	0 (0)	3 (17)	18
	Transportation machinery	3 (43)	5 (71)	2 (29)	1 (14)	5 (71)	0 (0)	1 (14)	7
	Others	2 (22)	5 (56)	2 (22)	3 (33)	4 (44)	1 (11)	4 (44)	9
Manufacturing sector total		21 (43)	30 (61)	11 (22)	10 (20)	27 (55)	1 (2)	12 (24)	49
Non-manufacture	Trading	1 (25)	1 (25)	0 (0)	0 (0)	0 (0)	1 (25)	2 (50)	4
	Retailer	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (100)	1
	Finance/insurance/securities	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (50)	2
	Construction/civil engineering	1 (20)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4 (80)	5
	Transportation/communication	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (100)	1
	Others	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
Non-manufacturing sector total		4 (29)	1 (7)	0 (0)	0 (0)	0 (0)	1 (7)	9 (64)	14
Total		24 (40)	31 (49)	11 (17)	10 (16)	27 (43)	2 (3)	21 (33)	63

(Table 11-4-2) Location of alternative production (check all that apply)

[Firms indirectly affected]		Unit: No. of firms and (%)							
Industry	Within Thailand	Outside Thailand					No alternative production	No. of firms	
			ASEAN	China	Japan	Others			
Manufacture	Food	3 (60)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (40)	5
	Textile	0 (0)	4 (67)	1 (17)	1 (17)	1 (17)	0 (0)	3 (50)	6
	Chemical	1 (7)	2 (14)	2 (14)	1 (7)	1 (7)	1 (7)	14 (100)	14
	Steel/non-ferrous metal	3 (16)	4 (21)	0 (0)	0 (0)	4 (21)	0 (0)	14 (74)	19
	General machinery	1 (25)	1 (25)	0 (0)	0 (0)	1 (25)	1 (25)	3 (75)	4
	Electric/electronics machinery	6 (43)	5 (36)	0 (0)	3 (21)	5 (36)	0 (0)	7 (50)	14
	Transportation machinery	16 (39)	25 (61)	6 (15)	7 (17)	21 (51)	2 (5)	12 (29)	41
	Others	4 (19)	5 (24)	0 (0)	2 (10)	4 (19)	0 (0)	15 (71)	21
Manufacturing sector total		34 (27)	46 (37)	9 (7)	14 (11)	37 (30)	4 (3)	70 (56)	124
Non-manufacture	Trading	11 (35)	11 (35)	3 (10)	5 (16)	9 (29)	1 (3)	16 (52)	31
	Retailer	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (50)	2
	Finance/insurance/securities	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	6 (100)	6
	Construction/civil engineering	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (100)	1
	Transportation/communication	1 (10)	1 (10)	1 (10)	1 (10)	1 (10)	0 (0)	8 (80)	10
	Others	0 (0)	1 (11)	0 (0)	0 (0)	1 (11)	0 (0)	8 (89)	9
Non-manufacturing sector total		13 (22)	13 (22)	4 (7)	6 (10)	11 (19)	1 (2)	40 (68)	59
Total		47 (26)	59 (32)	13 (7)	20 (11)	48 (26)	5 (3)	110 (60)	183

(5) Location of business resumption

As for the location of business resumption (check all that apply) in the manufacturing sector, the predominant response was “same location” (85 percent), while the percentage of the firms responding “relocation outside Thailand” amounted to 8 percent while the percentage is high especially in the electric/ electronics industry (16 percent). (Table 11-5)

(Table 11-5) Location of business resumption (check all that apply)

Unit: No. of firms and (%)

Industry	Same location	Relocation within Thailand	Relocation outside Thailand	Relocation outside Thailand				Undecided	No. of firms	
				ASEAN	China	Japan	Others			
Manufacture	Food	3 (75)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (25)	4
	Textile	3 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3
	Chemical	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
	Steel/non-ferrous metal	2 (100)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
	General machinery	2 (67)	2 (67)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3
	Electric/electronics machinery	14 (74)	5 (26)	3 (16)	1 (5)	1 (5)	1 (5)	0 (0)	1 (5)	19
	Transportation machinery	7 (100)	2 (29)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (14)	7
	Others	9 (100)	2 (22)	1 (11)	1 (11)	0 (0)	0 (0)	0 (0)	0 (0)	9
Manufacturing sector total	41 (85)	12 (25)	4 (8)	2 (4)	1 (2)	1 (2)	0 (0)	3 (6)	48	
Non-manufacture	Trading	4 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4
	Retailer	3 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3
	Finance/insurance/securities	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
	Construction/civil engineering	4 (80)	1 (20)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	5
	Transportation/communication	2 (100)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
	Others	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
Non-manufacturing sector total	17 (94)	2 (11)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	18	
Total	58 (88)	14 (21)	4 (6)	2 (3)	1 (2)	1 (2)	0 (0)	3 (5)	66	

(6) Employment adjustment

As for employment adjustment, the predominant response among firms directly affected was “none” (73 percent). In the manufacturing sector, while the percentage of the firms responding “none” was 67 percent, that of the firms responding “voluntary retirement” and “dismissal” were 24 percent. (Table 11-6-1)

Among firms indirectly affected, the percentage of the firms responding “none” amounted to 94 percent. (Table 11-6-2)

(Table 11-6-1) Employment adjustment

[Firms directly affected]		Unit: No. of firms and (%)							
Industry	None	Voluntary retirement	Dismissal	Temporary employees	Permanent employees	Both	Unknown	No. of firms	
Manufacture	Food	3 (75)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (25)	4
	Textile	2 (67)	0 (0)	1 (33)	0 (0)	1 (33)	0 (0)	0 (0)	3
	Chemical	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
	Steel/non-ferrous metal	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
	General machinery	3 (60)	1 (20)	0 (0)	0 (0)	0 (0)	1 (20)	0 (0)	5
	Electric/electronics machinery	11 (58)	2 (11)	4 (21)	0 (0)	1 (5)	3 (16)	2 (11)	19
	Transportation machinery	4 (67)	0 (0)	2 (33)	1 (17)	0 (0)	1 (17)	0 (0)	6
	Others	7 (78)	0 (0)	2 (22)	1 (11)	1 (11)	0 (0)	0 (0)	9
Manufacturing sector total		33 (67)	3 (6)	9 (18)	2 (4)	3 (6)	5 (10)	3 (6)	49
Non-manufacture	Trading	4 (80)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (20)	5
	Retailer	3 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3
	Finance/insurance/securities	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
	Construction/civil engineering	5 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	5
	Transportation/communication	1 (50)	1 (50)	1 (50)	0 (0)	1 (50)	0 (0)	0 (0)	2
	Others	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
Non-manufacturing sector total		16 (89)	1 (6)	1 (6)	0 (0)	1 (6)	0 (0)	1 (6)	18
Total		49 (73)	4 (6)	10 (15)	2 (3)	4 (6)	5 (7)	4 (6)	67

(Table 11-6-2) Employment adjustment

Industry		None	Voluntary retirement	Dismissal	Temporary employees	Permanent employees	Both	Unknown	Unit: No. of firms and (%)	
									No. of firms	%
Manufacture	Food	6 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	6	
	Textile	3 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3	
	Chemical	18 (95)	0 (0)	1 (5)	0 (0)	0 (0)	1 (5)	0 (0)	19	
	Steel/non-ferrous metal	23 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	23	
	General machinery	4 (80)	0 (0)	2 (40)	0 (0)	1 (20)	0 (0)	0 (0)	5	
	Electric/electronics machinery	15 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	15	
	Transportation machinery	38 (93)	0 (0)	2 (5)	2 (5)	0 (0)	0 (0)	1 (2)	41	
	Others	17 (85)	2 (10)	0 (0)	0 (0)	0 (0)	0 (0)	2 (10)	20	
Manufacturing sector total		124 (94)	2 (2)	5 (4)	2 (2)	1 (1)	1 (1)	3 (2)	132	
Non-manufacture	Trading	32 (91)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3 (9)	35	
	Retailer	4 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4	
	Finance/insurance/securities	8 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	8	
	Construction/civil engineering	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2	
	Transportation/communication	14 (93)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	15	
	Others	8 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	8	
Non-manufacturing sector total		68 (94)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3 (4)	72	
Total		192 (94)	2 (1)	5 (2)	2 (1)	1 (0)	1 (0)	6 (3)	203	

(7) Other Countries aside from Thailand where business operation has been affected

As for other countries aside from Thailand where business operation has been affected (check all "that apply), the predominant response was “Japan” (64 percent), followed by “Indonesia” (28 percent), “India” (27 percent) and “China” (27 percent). (Table 11-7)

(Table 11-7) Other Countries aside from Thailand where business operation has been affected (check all that apply)

Unit: No. of firms

Industry		Japan	Indonesia	India	China	Vietnam	Malaysia	USA	Singapore	Europe	Philippines	Myanmar	Cambodia	Oceania	Latin America	Middle East	Laos	Others	Total	No. of firms
Manufacture	Food	6 (67)	1 (11)	2 (22)	3 (33)	2 (22)	2 (22)	2 (22)	2 (22)	0 (0)	1 (11)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (11)	21	9
	Textile	5 (71)	1 (14)	0 (0)	2 (29)	1 (14)	0 (0)	3 (43)	1 (14)	3 (43)	1 (14)	1 (14)	1 (14)	0 (0)	0 (0)	0 (0)	1 (14)	0 (0)	15	7
	Chemical	9 (56)	5 (31)	7 (44)	2 (13)	1 (6)	3 (19)	1 (6)	2 (13)	0 (0)	1 (6)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	31	16
	Steel/ non-ferrous metal	11(73)	3 (20)	2 (13)	3 (20)	1 (7)	2 (13)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (7)	23	15
	General machinery	4 (44)	2 (22)	4 (44)	2 (22)	2 (22)	0 (0)	0 (0)	0 (0)	0 (0)	1 (11)	0 (0)	0 (0)	0 (0)	1 (11)	0 (0)	0 (0)	1 (11)	16	9
	Electric/ electronics machinery	26(79)	3 (9)	8 (24)	13(39)	6 (18)	14 (42)	9 (27)	13(39)	11(33)	5 (15)	0 (0)	2 (6)	4 (12)	1 (3)	2 (6)	0 (0)	1 (3)	102	33
	Transportation machinery	26(58)	18(40)	17(38)	9 (20)	9 (20)	11(24)	11(24)	1 (2)	11(24)	9 (20)	1 (2)	2 (4)	6 (13)	8 (18)	3 (7)	1 (2)	9 (20)	131	45
	Others	17(65)	3 (12)	8 (31)	9 (35)	3 (12)	1 (4)	7 (27)	2 (8)	5 (19)	1 (4)	1 (4)	2 (8)	3 (12)	2 (8)	3 (12)	1 (4)	2 (8)	63	26
Manufacturing sector total		104(65)	36(23)	48(30)	43(27)	25(16)	33(21)	33(21)	21(13)	30(19)	19(12)	3 (2)	7 (4)	13(8)	12(8)	8 (5)	3 (2)	16(10)	402	160
Non-manufacture	Trading	19(49)	22(56)	12(31)	11(28)	14(36)	3 (8)	4 (10)	6 (15)	2 (5)	1 (3)	15(38)	9 (23)	1 (3)	0 (0)	0 (0)	6 (15)	3 (8)	119	39
	Retailer	2 (100)	1 (50)	0 (0)	1 (50)	1 (50)	1 (50)	0 (0)	1 (50)	0 (0)	1 (50)	1 (50)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	9	2
	Construction	2 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (25)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (50)	5	4
	Others	21(84)	5 (20)	2 (8)	6 (24)	4 (16)	5 (20)	3 (12)	7 (28)	4 (16)	3 (12)	0 (0)	0 (0)	3 (12)	2 (8)	2 (8)	0 (0)	4 (16)	64	25
Non-manufacturing sector total		44(63)	28(40)	14(20)	18(26)	19(27)	9 (13)	7 (10)	15(21)	6 (9)	5 (7)	16(23)	10(14)	4 (6)	2 (3)	2 (3)	6 (9)	9 (13)	197	70
Total		148(64)	64(28)	62(27)	61(27)	44(19)	42(18)	40(17)	36(16)	36(16)	24(10)	19(8)	17(7)	17(7)	14(6)	10(4)	9 (4)	25(11)	599	230
This time		1	2	3	4	5	6	7	8	8	10	11	12	12	14	15	16	-		

(Note) Europe includes Russia.

(8) Cash management and lending stance of financial institutions after the floods

As for cash management after the floods, the predominant response was “no change” (62 percent), followed by “deteriorating” (34 percent) and “improving” (2 percent).

With respect to the lending stand of financial institutions after the floods, the predominant response was also “no change” (55 percent), followed by “unknown” (34 percent) (Table 11-8)

(Table 11-8) Cash management after the floods

Unit: No. of firms and (%)

Industry		Deteriorating		No change		Improving		Unknown		No. of firms
Manufacture	Food	3	(21)	11	(79)	0	(0)	0	(0)	14
	Textile	2	(25)	6	(75)	0	(0)	0	(0)	8
	Chemical	8	(33)	16	(67)	0	(0)	0	(0)	24
	Steel/non-ferrous metal	15	(54)	11	(39)	0	(0)	2	(7)	28
	General machinery	4	(31)	9	(69)	0	(0)	0	(0)	13
	Electric/electronics machinery	19	(53)	15	(42)	2	(6)	0	(0)	36
	Transportation machinery	25	(44)	29	(51)	2	(4)	1	(2)	57
	Others	9	(26)	25	(71)	0	(0)	1	(3)	35
	Manufacturing sector total		85	(40)	122	(57)	4	(2)	4	(2)
Non-manufacture	Trading	16	(30)	36	(68)	1	(2)	0	(0)	53
	Retailer	1	(9)	10	(91)	0	(0)	0	(0)	11
	Finance/insurance/securities	1	(0)	11	(0)	0	(0)	0	(0)	12
	Construction/civil engineering	4	(22)	11	(61)	1	(6)	2	(11)	18
	Transportation/communication	9	(41)	12	(55)	0	(0)	1	(5)	22
	Others	6	(24)	17	(68)	2	(8)	0	(0)	25
	Non-manufacturing sector total		37	(26)	97	(69)	4	(3)	3	(2)
Total		122	(34)	219	(62)	8	(2)	7	(2)	356

(Table 11-9) Lending stance of financial institutions

Unit: No. of firms and (%)

Industry		Negative	Rather negative	No change	Neutral	Positive	Unknown	No. of firms
Manufacture	Food	0 (0)	0 (0)	7 (50)	1 (7)	0 (0)	6 (43)	14
	Textile	1 (13)	0 (0)	5 (63)	1 (13)	0 (0)	1 (13)	8
	Chemical	0 (0)	0 (0)	16 (67)	0 (0)	0 (0)	8 (33)	24
	Steel/non-ferrous metal	2 (7)	2 (7)	16 (57)	0 (0)	2 (7)	6 (21)	28
	General machinery	0 (0)	0 (0)	9 (69)	0 (0)	0 (0)	4 (31)	13
	Electric/electronics machinery	2 (6)	4 (11)	16 (44)	0 (0)	3 (8)	11 (31)	36
	Transportation machinery	2 (4)	1 (2)	29 (53)	2 (4)	3 (5)	18 (33)	55
	Others	2 (6)	0 (0)	21 (60)	0 (0)	0 (0)	12 (34)	35
	Manufacturing sector total	9 (4)	7 (3)	119 (56)	4 (2)	8 (4)	66 (31)	213
Non-manufacture	Trading	0 (0)	1 (2)	31 (63)	0 (0)	2 (4)	15 (31)	49
	Retailer	0 (0)	0 (0)	5 (50)	0 (0)	0 (0)	5 (50)	10
	Construction/civil engineering	0 (0)	0 (0)	6 (43)	1 (7)	1 (7)	6 (43)	14
	Transportation/communication	0 (0)	0 (0)	12 (52)	0 (0)	1 (4)	10 (43)	23
	Others	0 (0)	2 (8)	11 (44)	0 (0)	0 (0)	12 (48)	25
Non-manufacturing sector total	0 (0)	3 (2)	65 (54)	1 (1)	4 (3)	48 (40)	121	
Total		9 (3)	10 (3)	184 (55)	5 (1)	12 (4)	114 (34)	334

(9) Floods-related requests to the Thai government

Regarding the floods-related requests to the Thai government (check all that apply), the predominant response was “ Speedy formulation of flood control plan” (83 percent), followed by “ Speedy and accurate information provision ” (68 percent) and “Foundation of reinsurance system ” (32 percent). (Table 11-10)

(Table 11-10) Floods-related requests to the Thai government (check all that apply)

Unit: No. of firms and (%)

Rank		Manufacture									Non-manufacture						Grand total	
		Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication	Others		Total
1	Speedy formulation of flood control plan	10(71)	7 (88)	19(86)	27(96)	8 (62)	33(92)	52(93)	29(78)	185(86)	40(77)	9 (90)	14(93)	13(76)	19(86)	15(63)	110(79)	295 (83)
2	Speedy and accurate information provision	9 (64)	4 (50)	16(73)	18(64)	5 (38)	21(58)	45(80)	23(62)	141(66)	38(73)	8 (80)	9 (60)	11(65)	19(86)	16(67)	101(72)	242 (68)
3	Foundation of reinsurance system	8 (57)	1 (13)	6 (27)	7 (25)	4 (31)	17 (47)	13(23)	10(27)	66(31)	20(38)	4 (40)	7 (47)	6 (35)	7 (32)	3 (13)	47(34)	113 (32)
4	Infectious disease measure	4 (29)	1 (13)	2 (9)	11(39)	2 (15)	7 (19)	8 (14)	13(35)	48(22)	19(37)	6 (60)	4 (27)	5 (29)	7 (32)	6 (25)	47(34)	95 (27)
5	Improvement in image of Thailand	3 (21)	4 (50)	4 (18)	5 (18)	5 (38)	5 (14)	5 (9)	9 (24)	40(19)	21(40)	5(50)	3 (20)	4 (24)	5 (23)	7 (29)	45(32)	85 (24)
6	Relaxation of requirement and procedure for visa and work permit	1 (7)	2 (25)	2 (9)	1 (4)	5 (38)	6 (17)	8 (14)	6 (16)	31(14)	11(21)	2 (20)	5 (33)	13(76)	4 (18)	3 (13)	38(27)	69 (19)
7	Early refund of VAT and customs duty	1 (7)	2 (25)	4 (18)	3 (11)	3 (23)	10(28)	13(23)	2 (5)	38(18)	11(21)	2 (20)	1 (7)	7 (41)	4 (18)	1 (4)	26(19)	64 (18)
8	Low-interest financing and moratorium	1 (7)	1 (13)	3 (14)	4 (14)	4 (31)	6 (17)	6 (11)	5 (14)	30(14)	7 (13)	0 (0)	0 (0)	2 (12)	3 (14)	2 (8)	14(10)	44 (12)
9	Others	1 (7)	1 (13)	0 (0)	0 (0)	1 (8)	0 (0)	0 (0)	5 (14)	8 (4)	0 (0)	0 (0)	0 (0)	1 (6)	2 (9)	0 (0)	3 (2)	11 (3)
Total		38	23	56	76	37	105	150	102	587	167	36	43	62	70	53	431	1,018
No. of firms		14	8	22	28	13	36	56	37	214	52	10	15	17	22	24	140	354 (100)

12. IMPACTS OF MINIMUM WAGE INCREASE

(1) Impacts of minimum wage increase on business performance

With reference to the impacts of minimum wage increase on business performance, the predominant response was “significant impacts” (63 percent). The percentages of the firms responding “limited impacts” and “no impact in particular” were 25 percent and 10 percent respectively.

The percentage of the firms responding “significant impacts” is high especially in the food (93 percent), followed by textile (88 percent), electric/ electronics machinery (83 percent), steel/ non-ferrous metal and other manufacturing (79 percent) and transportation machinery (77 percent) industries. (Table 12-1)

(Table 12-1) Impacts of minimum wage increase

		Unit: No. of firms and (%)								
Industry		Significant impacts		Limited impacts		No impact in particular		Unknown		No. of firms
Manufacture	Food	13	(93)	1	(7)	0	(0)	0	(0)	14
	Textile	7	(88)	0	(0)	0	(0)	1	(13)	8
	Chemical	15	(63)	7	(29)	1	(4)	1	(4)	24
	Steel/non-ferrous metal	22	(79)	6	(21)	0	(0)	0	(0)	28
	General machinery	10	(71)	4	(29)	0	(0)	0	(0)	14
	Electric/electronics machinery	30	(83)	5	(14)	1	(3)	0	(0)	36
	Transportation machinery	43	(77)	10	(18)	3	(5)	0	(0)	56
	Others	30	(79)	7	(18)	1	(3)	0	(0)	38
	Manufacturing sector total		170	(78)	40	(18)	6	(3)	2	(1)
Non-manufacture	Trading	18	(34)	17	(32)	16	(30)	2	(4)	53
	Retailer	6	(60)	3	(30)	1	(10)	0	(0)	10
	Finance/insurance/securities	3	(0)	7	(0)	5	(0)	1	(0)	16
	Construction/civil engineering	8	(44)	9	(50)	1	(6)	0	(0)	18
	Transportation/communication	17	(74)	5	(22)	0	(0)	1	(4)	23
	Others	5	(20)	10	(40)	9	(36)	1	(4)	25
	Non-manufacturing sector total		57	(39)	51	(35)	32	(22)	5	(3)
Total		227	(63)	91	(25)	38	(10)	7	(2)	363

(2) Factors of impacts by minimum wage increase on business performance (check all that apply)

As for the factors of impacts by minimum wage increase on business performance (check all that apply), the predominant response was “need to not only follow the new minimum wage but also increase salary of employees not applicable” (75 percent). The percentages of the firms responding “increased procurement cost which may not be able to add to selling price” and “need to follow the new minimum wage” were 40 percent and 31 percent respectively.

The percentage of the firms responding “increased procurement cost which may not be able to add to selling price” is high especially in the food (75 percent), electric/ electronics machinery (57 percent), and transportation/ communication and other manufacturing industries (53 percent). (Table 12-2)

(Table 12-2) Factors of impacts by minimum wage increase on business performance (check all that apply)

Unit: No. of firms and (%)

Rank		Manufacture								Non-manufacture						Grand total		
		Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication		Others	Total
1	Need to not only follow the new minimum wage but also increase salary of employees not applicable	11(92)	6 (86)	14(93)	20(91)	7 (70)	27(90)	35(80)	25(83)	145(85)	7 (35)	4 (57)	2 (25)	6 (38)	14(93)	4 (50)	37(50)	182 (75)
2	Increased procurement cost which may not be able to add to selling price	9 (75)	1 (14)	6 (40)	6 (27)	5 (50)	17(57)	16(36)	16(53)	76(45)	9 (45)	1 (14)	0 (0)	4 (25)	8 (53)	0 (0)	22(30)	98 (40)
3	Need to follow the new minimum wage	6 (50)	1 (14)	3 (20)	7 (32)	3 (30)	13(43)	14(32)	12(40)	59(35)	5 (25)	2 (29)	0 (0)	4 (25)	6 (40)	0 (0)	17(23)	76 (31)
4	Current wage exceeding the new minimum wage, but need to increase salary based on the increase rate	1 (8)	1 (14)	1 (7)	0 (0)	4 (40)	6 (20)	8 (18)	4 (13)	25(15)	6 (30)	2 (29)	0 (0)	0 (0)	4 (27)	1 (13)	13(18)	38 (16)
5	Others	1 (8)	0 (0)	0 (0)	1 (5)	0 (0)	0 (0)	0 (0)	1 (3)	3 (2)	4 (20)	0 (0)	0 (0)	0 (0)	1 (7)	0 (0)	5 (7)	8 (3)
Total		28	9	24	34	19	63	73	58	308	31	9	2	14	33	5	94	402
No. of firms		12	7	15	22	10	30	44	30	170	20	7	8	16	15	8	74	244 (100)

(3) Measures against minimum wage increase

As for the measures against minimum wage increase (check all that apply), the predominant response was “improvement of productivity through automation” (50 percent), followed by “control of the number of employees” (47 percent). Others include “adjustment of selling price,” “reduction of other costs” and “no measures in particular.” (Table 12-3)

(Table 12-3) Measures against minimum wage increase (check all that apply)

		Unit: No. of firms and (%)																
Rank		Manufacture								Non-manufacture							Grand total	
		Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication	Others		Total
1	Improvement of productivity through automation	7(54)	3 (38)	13(62)	13(50)	5 (45)	23(68)	39(80)	25(71)	128(65)	5 (15)	1 (20)	3 (50)	0 (0)	3 (16)	2 (17)	14(16)	142 (50)
2	Control of the number of employees	5(38)	4 (50)	7 (33)	12(46)	8 (73)	21(62)	17(35)	16(46)	90(46)	13(39)	2 (40)	4 (67)	7 (70)	10(53)	6 (50)	42(49)	132 (47)
3	Relocation or production transfer to other countries	0 (0)	2 (25)	1 (5)	0 (0)	1 (9)	1 (3)	1 (2)	4 (11)	10(5)	3 (9)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3 (4)	13 (5)
4	Others	4(31)	0 (0)	3 (14)	7 (27)	2 (18)	4 (12)	4 (8)	5 (14)	29(15)	13(39)	2 (40)	1 (17)	3 (30)	8 (42)	6 (50)	33(39)	62 (22)
Total		16	9	24	32	16	49	61	50	257	34	5	8	10	21	14	92	349
No. of firms		13	8	21	26	11	34	49	35	197	33	5	6	10	19	12	85	282 (100)

13. EFFECTS OF THE ASEAN ECONOMIC COMMUNITY (AEC)

(1) Effects of the AEC to business opportunities

As for the effects of the AEC to business opportunities, the predominant response was “increase” (38 percent), followed by “unknown” (33 percent) and “no change” (28 percent).

The percentage of the firms responding “increase” is high especially in the textile (75 percent), trading (57 percent), transportation/ communication (52 percent), and food and general machinery industries (50 percent) . (Table 13-1)

(Table 13-1) Effects of the AEC to business opportunities

		Unit: No. of firms and (%)								
Industry		Increase		No change		Decrease		Unknown		No. of firms
Manufacture	Food	7	(50)	5	(36)	0	(0)	2	(14)	14
	Textile	6	(75)	1	(13)	0	(0)	1	(13)	8
	Chemical	9	(38)	10	(42)	0	(0)	5	(21)	24
	Steel/non-ferrous metal	7	(26)	7	(26)	1	(4)	12	(44)	27
	General machinery	7	(50)	3	(21)	0	(0)	4	(29)	14
	Electric/electronics machinery	10	(28)	12	(33)	1	(3)	13	(36)	36
	Transportation machinery	20	(36)	15	(27)	1	(2)	20	(36)	56
	Others	12	(32)	8	(22)	2	(5)	15	(41)	37
	Manufacturing sector total		78	(36)	61	(28)	5	(2)	72	(33)
Non-manufacture	Trading	29	(57)	8	(16)	0	(0)	14	(27)	51
	Retailer	3	(27)	3	(27)	0	(0)	5	(45)	11
	Finance/insurance/securities	4	(0)	6	(0)	0	(0)	6	(0)	16
	Construction/civil engineering	2	(11)	6	(33)	0	(0)	10	(56)	18
	Transportation/communication	12	(52)	4	(17)	0	(0)	7	(30)	23
	Others	9	(38)	11	(46)	0	(0)	4	(17)	24
	Non-manufacturing sector total		59	(41)	38	(27)	0	(0)	46	(32)
Total		137	(38)	99	(28)	5	(1)	118	(33)	359

(2) AEC-related requests to the Thai government

As for the AEC-related requests to the Thai government (check all that apply), the predominant response was “Simple and speedy customs procedures ” (68 percent), followed by “Mutual elimination of Tariffs” (65 percent) and “Relaxation of movement of persons” (34 percent). The number of the firms responding “ Relaxation or deregulation of capital controls” was high in the non-manufacturing sector (40 percent), especially in the finance/ insurance/ securities industry (91 percent). (Table 13-2)

(Table 13-2) AEC-related requests to the Thai government

		Unit: No. of firms and (%)																
Rank		Manufacture									Non-manufacture						Grand total	
		Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electric/electronics machinery	Transportation machinery	Others	Total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication	Others		Total
1	Simple and speedy customs procedures	11(79)	5 (71)	18(78)	18(75)	11(85)	24(75)	38(79)	26(76)	151(77)	36(75)	4(44)	1(9)	6(43)	14(61)	6(32)	67(54)	218 (68)
2	Mutual elimination of Tariffs	10(71)	6 (86)	16(70)	14(58)	8 (62)	24(75)	37(77)	23(68)	138(71)	37(77)	6(67)	2(18)	6 (43)	11(48)	7(37)	69(56)	207 (65)
3	Relaxation of movement of persons	7 (50)	3 (43)	4 (17)	10(42)	2 (15)	12(38)	15(31)	12(35)	65(33)	14(29)	5 (56)	1 (9)	8 (57)	10(43)	7(37)	45(36)	110 (34)
4	Relaxation or deregulation of capital controls	6(43)	1 (14)	2 (9)	2 (8)	2 (15)	5 (16)	7 (15)	7 (21)	32(16)	13(27)	4 (44)	10(91)	6 (43)	9 (39)	8 (42)	50(40)	82 (26)
5	The removal of non-tariff barriers	4(29)	0 (0)	4 (17)	4 (17)	1 (8)	9 (28)	11(23)	9 (26)	42(22)	12(25)	4 (44)	0 (0)	3 (21)	8 (35)	4 (21)	31(25)	73 (23)
6	Others	1 (7)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (2)	1 (3)	3 (2)	1 (2)	0 (0)	0 (0)	0 (0)	3 (13)	1 (5)	5 (4)	8 (3)
Total		39	15	44	48	24	74	109	78	431	113	23	14	29	55	33	267	698
No. of firms		14	7	23	24	13	32	48	34	195	48	9	11	14	23	19	124	124 (100)