

Survey of Business Sentiment on Japanese Corporations in Thailand
for the 2nd half of 2013

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Survey of Business Sentiment of Japanese Corporations in Thailand for the 2nd half of 2013

JCC Economic Survey Team
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Survey Period

Questionnaire request date 13 November, 2013
Questionnaire response deadline 12 December, 2013

Questionnaire response

This questionnaire was distributed to
1,504 JCC member corporations.
(Eleven governmental organizations were excluded).

No. of firms responding to this questionnaire
412 corporations

The response percentage
27.4%

No. of firms		
Industry		No.
Manufacturing	Food	10
	Textiles	12
	Chemicals	27
	Steel/Non-ferrous metal	29
	General machinery	8
	Electrical/Electronic machinery	61
	Transportation machinery	46
	Others	41
	Manufacturing sector total	234
Non-manufacturing	Trading	62
	Retailing	11
	Finance/Insurance/Securities	21
	Construction/Civil engineering	25
	Transportation/Communications	30
	Other	29
	Non-manufacturing sector total	178
Total		412

Note

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

Report about the response to this questionnaire

Please refer to the following pages.

1. BUSINESS SENTIMENT

(1) Summary

Business sentiment in the first half of 2013 saw weaker improvement, compared with the year 2012 when economy rapidly recovered from the impact of the floods. Business sentiment in the second half of 2013 is expected to turn to deterioration, while improvement is expected in the first half of 2014 (Table 1-1).

(Table 1-1) Business Sentiment

	Past Surveys								Previous					Unit %
	Result								12		13		14	
	09		10		11		12		12		13		14	
	H1	H2	H1	H2	H1	H2	H1	H2	H1	H2	H1	H2	H1	H2
Improving	15	71	72	71	57	21	76	60	46	41	46	35	37	
No change	17	14	15	18	18	17	11	21	25	38	28	25	41	
Deteriorating	68	16	12	12	25	62	14	19	29	22	25	40	22	
(Ref) DI	▲ 53	55	60	59	32	▲ 41	62	41	17	19	21	▲ 5	15	

(Note.) DI = "improving" - "deteriorating"

2. As the fraction of a percentage is rounded off, the

(Note) To determine whether business performance is “improving” or “deteriorating”, business performance should be compared between this term and the previous term. If DI, which is the balance between those two figures, is above the neutral level, it signifies that business performance of many firms is improving. If it’s below the neutral level, it signifies that they are deteriorating.

(2) The first half of 2013 (January - June) - Actual

The percentage of firms reporting that business sentiment was “improving” decreased by 14 points to 46% from the previous term (60%), whereas those reporting “deteriorating” increased by 6 points to 25% from the previous term (19%). As a result, the Diffusion Index (DI), which is the balance between “improving” and “deteriorating”, was calculated as +21, 20 points lower than the previous term (+41) (Table 1-1).

The DI turned to “deteriorating” in many industries in the manufacturing sector, especially transportation machinery, as a result, the overall DI for the manufacturing sector decreased by 16 points to +16 from the previous term (+32). For the non-manufacturing sector, it also turned to “deteriorating” in all industries excluding Others, with the overall DI in the non-manufacturing sector decreasing by 25 points to +29 from the previous term (+54) (Table 1-2).

(3) The second half of 2013 (July - December) - Forecast

The percentage of firms reporting that business performance was “improving” decreased 11 points to 35% from the previous term (46%), whereas the percentage of firms reporting “deteriorating” increased 15 points to 40% from the previous term (25%). As a result, the overall DI is expected to be lower by 26 points than the previous term (+21) to -5 (Table 1-1).

The DI turned to “deteriorating” in many industries in the manufacturing sector including steel/ non-ferrous metals and transportation machinery. As a result, the overall DI in the manufacturing sector decreased by 30 points to -14 from the previous term (+16). For the non-manufacturing sector, it is expected to turn to “deteriorating” in all industries excluding retail, with the overall DI in the non-manufacturing sector decreasing by 22 points to +7 from the previous term (+29) (Table 1-2).

(4) First half of 2014 (January – June) - Forecast

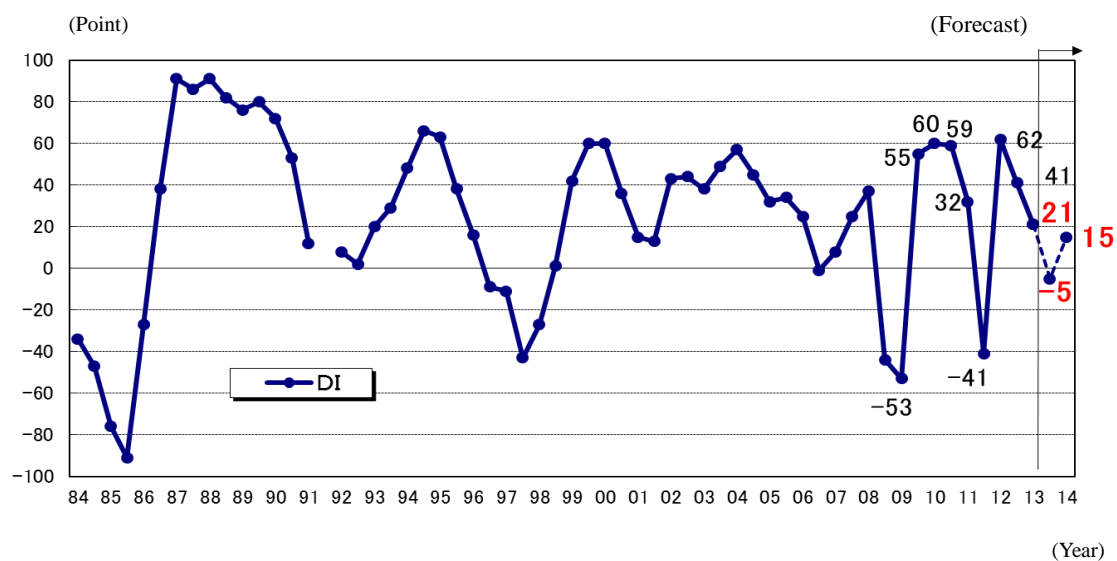
The percentage of firms reporting that business performance was “improving” increased by 2 points to 37% from the previous term (35%), whereas the percentage of firms reporting “deteriorating” fell by 18 points to 22% from the previous term (40%). As a result, the overall DI is expected to increase by 20 points to +15 from the previous term (-5) (Table 1-1).

In the manufacturing sector, the DI is expected to increase by 25 points to +11 compared to the previous term (-14) due to increases in many industries including steel/ non-ferrous metals and transportation machinery. For the non-manufacturing sector, it is expected to increase in many industries, especially trading and retailing, the overall DI is expected to increase by 15 points to +22 from the previous period (+7) (Table 1-2).

(Table 1-2) DI by Industry ("improving" – "deteriorating")

Industry	Past survey						Survey this time					
	Result						Forecast		Result		Forecast	
	10H1	10H2	11H1	11H2	12H1	12H2	13H1	13H2	13H1	13H2	14H1	
Manufacturing	Food	0	0	29	▲ 31	18	0	▲ 75	▲ 29	▲ 37	▲ 8	▲ 25
	Textiles	15	18	38	▲ 14	14	31	▲ 16	23	33	58	33
	Chemicals	75	55	▲ 12	▲ 69	37	34	0	▲ 3	22	▲ 8	16
	Steel/Non-ferrous metal	96	68	18	▲ 87	59	35	47	7	52	▲ 31	33
	General machinery	77	47	57	▲ 17	100	0	7	20	0	0	▲ 12
	Electrical/electronic machinery	65	38	27	▲ 77	59	13	0	30	5	5	12
	Transportation machinery	87	94	▲ 7	▲ 74	74	74	33	▲ 13	9	▲ 54	▲ 2
	Others	62	42	32	▲ 39	59	26	21	26	18	▲ 17	15
	Manufacturing sector total	67	52	16	▲ 59	56	32	13	10	16	▲ 14	11
Non-manufacturing	Trading	83	83	59	▲ 46	70	61	33	40	30	▲ 7	30
	Retailing	12	100	82	30	75	64	29	50	10	28	55
	Finance/Insurance/Securities	54	82	64	7	53	73	47	26	61	33	5
	Construction/Civil engineering	7	50	88	55	89	65	17	19	20	3	▲ 20
	Transportation/Communication	69	55	32	▲ 37	80	40	11	30	13	0	24
	Others	17	53	52	▲ 4	59	31	11	19	37	22	38
	Non-manufacturing sector total	48	70	59	▲ 10	71	54	24	32	29	7	22
Total		60	59	32	▲ 41	62	41	17	19	21	▲ 5	15

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



(Note)

1. Diffusion Index (DI) = improving – deteriorating (Compared with the previous term)
2. No survey was implemented in the second half of 1991.

2. SALES

The percentage of firms reporting an “increase” in their total forecast sales in 2013 fell by 18 points to 55% from the previous year (73%). The percentage of firms reporting a “more than 20% increase” in their total sales fell by 17 points to 17% from the previous year (34%) (Table 2-1 and Table 2-2).

Regarding sales forecasts for 2014, the number of firms anticipating an “increase” in their total sales increased by 7 points to 62% from the previous period (55%), and the percentage of firms anticipating a “more than 20% increase” in their total sales also decreased by 3 points, from 17% in the previous period to 14% (Table 2-1 and Table 2-3).

(Table 2-1) Change in total sales

Unit : %

Year	Past Surveys							Previous survey		Survey this time	
	Result							Result	Forecast	Forecast	
	05	06	07	08	09	10	11	12	13	13	14
Sales increase	73	65	61	56	33	82	54	73	60	55	62
Sales increase more than 20%	27	17	14	14	6	46	13	34	15	17	14

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

(Table 2-2) Total Sales Forecast in 2013

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%			
Manufacturing	Food	4 (40)	1 (10)	2 (20)	2 (20)	4 (40)	2 (20)	1 (10)			
	Textiles	8 (67)	5 (42)	1 (8)	2 (17)	0 (0)	4 (33)	3 (25)	1 (8)	0 (0)	
	Chemicals	11 (42)	3 (12)	2 (8)	6 (23)	5 (19)	10 (38)	7 (27)	2 (8)	1 (4)	
	Steel/Non-ferrous metal	15 (56)	7 (26)	4 (15)	4 (15)	2 (7)	10 (37)	8 (30)	0 (0)	2 (7)	
	General machinery	3 (43)	0 (0)	0 (0)	3 (43)	0 (0)	4 (57)	1 (14)	1 (14)	2 (29)	
	Electrical/electronic machinery	33 (56)	9 (15)	8 (14)	16 (27)	9 (15)	17 (29)	6 (10)	7 (12)	4 (7)	
	Transportation machinery	17 (40)	5 (12)	6 (14)	6 (14)	5 (12)	20 (48)	8 (19)	9 (21)	3 (7)	
	Others	24 (59)	7 (17)	7 (17)	10 (24)	6 (15)	11 (27)	4 (10)	4 (10)	3 (7)	
Manufacturing sector total		115 (51)	37 (17)	29 (13)	49 (22)	29 (13)	80 (36)	39 (17)	25 (11)	16 (7)	
Non-manufacturing	Trading	32 (56)	6 (11)	13 (23)	13 (23)	9 (16)	16 (28)	8 (14)	8 (14)	0 (0)	
	Retailing	9 (82)	2 (18)	5 (45)	2 (18)	0 (0)	2 (18)	2 (18)	0 (0)	0 (0)	
	Finance/Insurance/Securities	15 (88)	3 (18)	6 (35)	6 (35)	1 (6)	1 (6)	0 (0)	0 (0)	1 (6)	
	Construction/Civil engineering	13 (50)	7 (27)	3 (12)	3 (12)	4 (15)	9 (35)	1 (4)	5 (19)	3 (12)	
	Transportation/Communication	17 (57)	3 (10)	9 (30)	5 (17)	3 (10)	10 (33)	3 (10)	7 (23)	0 (0)	
	Others	15 (56)	10 (37)	3 (11)	2 (7)	8 (30)	4 (15)	2 (7)	1 (4)	1 (4)	
Non-manufacturing sector total		101 (60)	31 (18)	39 (23)	31 (18)	25 (15)	42 (25)	16 (10)	21 (13)	5 (3)	
Total		216 (55)	68 (17)	68 (17)	80 (20)	54 (14)	122 (31)	55 (14)	46 (12)	21 (5)	

(Table 2-3) Sales Forecast for 2014

Unit : No. of firms (%)

Industry		Increase			No change	Decrease					
		More than 20%	10~20%	Less than 10%		Less than 10%	10~20%	More than 20%			
Manufacturing	Food	6 (60)	1 (10)	4 (40)	3 (30)	1 (10)	1 (10)	0 (0)	0 (0)		
	Textiles	9 (75)	2 (17)	1 (8)	6 (50)	2 (17)	1 (8)	0 (0)	0 (0)	0 (0)	
	Chemicals	17 (63)	3 (11)	7 (26)	7 (26)	6 (22)	4 (15)	3 (11)	1 (4)	0 (0)	
	Steel/Non-ferrous metal	21 (84)	3 (12)	8 (32)	10 (40)	2 (8)	2 (8)	2 (8)	0 (0)	0 (0)	
	General machinery	6 (75)	2 (25)	2 (25)	2 (25)	0 (0)	2 (25)	0 (0)	1 (13)	1 (13)	
	Electrical/electronic machinery	36 (61)	7 (12)	18 (31)	11 (19)	16 (27)	7 (12)	4 (7)	2 (3)	1 (2)	
	Transportation machinery	15 (35)	4 (9)	6 (14)	5 (12)	12 (28)	16 (37)	14 (33)	2 (5)	0 (0)	
	Others	24 (59)	3 (7)	11 (27)	10 (24)	6 (15)	11 (27)	7 (17)	4 (10)	0 (0)	
Manufacturing sector total		134 (60)	25 (11)	54 (24)	55 (24)	47 (21)	44 (20)	32 (14)	10 (4)	2 (1)	
Non-manufacturing	Trading	42 (70)	8 (13)	14 (23)	20 (33)	14 (23)	4 (7)	4 (7)	0 (0)	0 (0)	
	Retailing	9 (82)	3 (27)	2 (18)	4 (36)	1 (9)	1 (9)	1 (9)	0 (0)	0 (0)	
	Finance/Insurance/Securities	11 (65)	2 (12)	2 (12)	7 (41)	3 (18)	3 (18)	1 (6)	1 (6)	1 (6)	
	Construction/Civil engineering	8 (31)	4 (15)	3 (12)	1 (4)	10 (38)	8 (31)	2 (8)	4 (15)	2 (8)	
	Transportation/Communication	22 (76)	4 (14)	7 (24)	11 (38)	2 (7)	5 (17)	2 (7)	1 (3)	2 (7)	
	Others	20 (69)	10 (34)	4 (14)	6 (21)	8 (28)	1 (3)	1 (3)	0 (0)	0 (0)	
Non-manufacturing sector total		112 (65)	31 (18)	32 (19)	49 (28)	38 (22)	22 (13)	11 (6)	6 (3)	5 (3)	
Total		246 (62)	56 (14)	86 (22)	104 (26)	85 (21)	66 (17)	43 (11)	16 (4)	7 (2)	

3. PRE-TAX PROFIT/LOSS

Firms reporting a “profit” in their 2013 pre-tax profit/loss accounts were 80%. Firms reporting an “increase” in their net profit (including the case that any loss will diminish or vanish) accounted for 44%, whereas those reporting a “decrease” in their net profit accounted for 37 % (Table 3-1).

The percentage of firms anticipating a “profit” in their 2014 pre-tax profit/loss was 86%. Firms anticipating an “increase” in their pre-tax profit were 41%, whereas those anticipating a “decrease” in their pre-tax profit were 30% (Table 3-2).

(Table 3-1) Forecast of pre-tax profit/loss in 2013 (from the previous year)

		Unit : No. of firms (%)						
Industry		Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease
Manufacturing	Food	6 (67)	2 (22)	1 (11)	9	2 (22)	2 (22)	5 (56)
	Textiles	11 (92)	0 (0)	1 (8)	12	7 (58)	1 (8)	4 (33)
	Chemicals	24 (89)	0 (0)	3 (11)	27	11 (41)	6 (22)	10 (37)
	Steel/Non-ferrous metal	20 (69)	2 (7)	7 (24)	29	20 (69)	1 (3)	8 (28)
	General machinery	7 (88)	0 (0)	1 (13)	8	2 (25)	3 (38)	3 (38)
	Electrical/electronic machinery	42 (72)	4 (7)	12 (21)	58	21 (36)	10 (17)	27 (47)
	Transportation machinery	41 (93)	1 (2)	2 (5)	44	15 (34)	9 (20)	20 (45)
	Others	31 (74)	1 (2)	10 (24)	42	12 (29)	12 (29)	18 (43)
	Manufacturing sector total	182 (79)	10 (4)	37 (16)	229	90 (39)	44 (19)	95 (41)
Non-manufacturing	Trading	51 (86)	3 (5)	5 (8)	59	30 (51)	12 (20)	17 (29)
	Retailing	7 (64)	0 (0)	4 (36)	11	7 (64)	0 (0)	4 (36)
	Finance/Insurance/Securities	17 (94)	1 (6)	0 (0)	18	13 (72)	2 (11)	3 (17)
	Construction/Civil engineering	21 (81)	2 (8)	3 (12)	26	9 (35)	6 (23)	11 (42)
	Transportation/Communication	25 (81)	2 (6)	4 (13)	31	13 (42)	6 (19)	12 (39)
	Others	17 (71)	4 (17)	3 (13)	24	12 (50)	7 (29)	5 (21)
	Non-manufacturing sector total	138 (82)	12 (7)	19 (11)	169	84 (50)	33 (20)	52 (31)
Total		320 (80)	22 (6)	56 (14)	398	174 (44)	77 (19)	147 (37)

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

(Table 3-2) Forecast of pre-tax profit/loss in 2014 (from the previous year)

		Unit : No. of firms (%)						
Industry		Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease
Manufacturing	Food	6 (67)	3 (33)	0 (0)	9	3 (33)	5 (56)	1 (11)
	Textiles	11 (92)	0 (0)	1 (8)	12	7 (58)	2 (17)	3 (25)
	Chemicals	23 (88)	2 (8)	1 (4)	26	13 (50)	7 (27)	6 (23)
	Steel/Non-ferrous metal	24 (80)	1 (3)	5 (17)	30	12 (40)	12 (40)	6 (20)
	General machinery	7 (88)	1 (13)	0 (0)	8	5 (63)	0 (0)	3 (38)
	Electrical/electronic machinery	50 (86)	6 (10)	2 (3)	58	24 (41)	23 (40)	11 (19)
	Transportation machinery	38 (88)	3 (7)	2 (5)	43	11 (26)	9 (21)	23 (53)
	Others	31 (78)	5 (13)	4 (10)	40	18 (45)	9 (23)	13 (33)
	Manufacturing sector total	190 (84)	21 (9)	15 (7)	226	93 (41)	67 (30)	66 (29)
Non-manufacturing	Trading	52 (88)	3 (5)	4 (7)	59	24 (41)	20 (34)	15 (25)
	Retailing	10 (91)	1 (9)	0 (0)	11	7 (64)	2 (18)	2 (18)
	Finance/Insurance/Securities	17 (94)	1 (6)	0 (0)	18	11 (61)	0 (0)	7 (39)
	Construction/Civil engineering	21 (84)	1 (4)	3 (12)	25	3 (12)	9 (36)	13 (52)
	Transportation/Communication	27 (90)	2 (7)	1 (3)	30	14 (47)	8 (27)	8 (27)
	Others	23 (85)	2 (7)	2 (7)	27	9 (33)	10 (37)	8 (30)
	Non-manufacturing sector total	150 (88)	10 (6)	10 (6)	170	68 (40)	49 (29)	53 (31)
Total		340 (86)	31 (8)	25 (6)	396	161 (41)	116 (29)	119 (30)

(Note) Same as Table 3-1.

4. CAPITAL INVESTMENT (MANUFACTURING SECTOR)

The percentage of the firms which anticipate “Increase” in their capital investments in 2014 was 33% , 23 % of the firms anticipate “No change” while 38% of the firms anticipate “Decrease” (Table 4-1).

The predominant reason for capital investment was “replacement” in both 2013 and 2014 (Table 4-2 and Table 4-3).

(Table 4-1) Planned capital investment for 2013 and 2014 (manufacturing sector)

Unit: No. of firms and (%), Million Baht and %

Industry	No. of firms					2013	2014	
	Increase	No change	Decrease	Undecided	Total	Amount	Amount	Increase %
Food	2 (20)	3 (30)	5 (50)	0 (0)	10	1,329	761	▲ 42.7
Textiles	4 (33)	5 (42)	3 (25)	0 (0)	12	1,037	1,411	36.1
Chemicals	14 (50)	2 (7)	11 (39)	1 (4)	28	9,461	6,155	▲ 34.9
Steel/Non-ferrous metal	9 (32)	7 (25)	9 (32)	3 (11)	28	3,516	1,898	▲ 46.0
General machinery	1 (13)	2 (25)	5 (63)	0 (0)	8	311	170	▲ 45.3
Electrical/Electronic machinery	16 (27)	14 (24)	24 (41)	5 (8)	59	24,797	14,782	▲ 40.4
Transportation machinery	13 (30)	13 (30)	17 (39)	1 (2)	44	44,432	26,005	▲ 41.5
Others	17 (40)	8 (19)	14 (33)	3 (7)	42	9,197	7,535	▲ 18.1
Manufacturing sector	76 (33)	54 (23)	88 (38)	13 (6)	231	94,079	58,717	▲ 37.6

(Note) The figures in the table above show just the totals of the data from firms responding both for 2013 and 2014. The capital-investment amount in the table above does not equal that of all the Japanese corporations as a whole. In addition, new firms are not included.

(Table 4-2) Details of actual capital investment in 2013 (check all that apply)

Unit: No. of firms and (%)

Industry	New	Expansion	Replacement	Streamlining	Flood disaster prevention	Others	Total	Response
Food	5 (50)	2 (20)	8 (80)	2 (20)	1 (10)	0 (0)	18	10
Textiles	3 (25)	6 (50)	7 (58)	2 (17)	1 (8)	0 (0)	19	12
Chemicals	6 (22)	15 (56)	13 (48)	7 (26)	1 (4)	0 (0)	42	27
Steel/Non-ferrous metal	12 (41)	10 (34)	15 (52)	6 (21)	2 (7)	0 (0)	45	29
General machinery	2 (25)	3 (38)	4 (50)	2 (25)	0 (0)	1 (13)	12	8
Electrical/Electronic machinery	25 (41)	23 (38)	31 (51)	20 (33)	4 (7)	3 (5)	106	61
Transportation machinery	25 (54)	18 (39)	21 (46)	17 (37)	0 (0)	2 (4)	83	46
Others	16 (39)	18 (44)	14 (34)	13 (32)	3 (7)	2 (5)	66	41
Manufacturing sector	94 (40)	95 (41)	113 (48)	69 (29)	12 (5)	8 (3)	391	234

(Table 4-3) Details of actual capital investment in 2014 (check all that apply)

Unit: No. of firms and (%)

Industry	New	Expansion	Replacement	Streamlining	Flood disaster prevention	Others	Total	Response
Food	6 (60)	1 (10)	7 (70)	4 (40)	0 (0)	0 (0)	18	10
Textiles	4 (33)	6 (50)	6 (50)	4 (33)	1 (8)	0 (0)	21	12
Chemicals	6 (22)	11 (41)	17 (63)	10 (37)	1 (4)	1 (4)	46	27
Steel/Non-ferrous metal	9 (31)	7 (24)	19 (66)	10 (34)	0 (0)	0 (0)	45	29
General machinery	1 (13)	2 (25)	5 (63)	6 (75)	0 (0)	0 (0)	14	8
Electrical/Electronic machinery	15 (25)	23 (38)	31 (51)	22 (36)	2 (3)	4 (7)	97	61
Transportation machinery	26 (57)	9 (20)	21 (46)	20 (43)	2 (4)	0 (0)	78	46
Others	15 (38)	12 (30)	13 (33)	14 (35)	0 (0)	1 (3)	55	40
Manufacturing sector	82 (35)	71 (30)	119 (51)	90 (39)	6 (3)	6 (3)	374	233

5. EXPORT TREND

The percentage of firms reporting an “increase” in their exports accounted for 35% in the second half of 2013 and 36% in the full year of 2013 and exceeded the “decrease” in both terms. The percentage of firms reporting an “increase” in their exports accounted for 41% in the first half of 2014 and exceeded the “decrease” (11%) by 30 points (Table 5-1, Table 5-2, Table 5-3).

(Table 5-1) Exports in 2013 (second half)

Unit: No. of firms and (%)

Industry	Increase				No change	Decrease				Total
		More than 20%	10-20%	Less than 10%			Less than 10%	10-20%	More than 20%	
Food	3 (33)	1 (11)	0 (0)	2 (22)	5 (56)	1 (11)	1 (11)	0 (0)	0 (0)	9
Textiles	9 (75)	3 (25)	4 (33)	2 (17)	1 (8)	2 (17)	2 (17)	0 (0)	0 (0)	12
Chemicals	13 (52)	7 (28)	2 (8)	4 (16)	8 (32)	4 (16)	1 (4)	2 (8)	1 (4)	25
Steel/Non-ferrous metal	5 (21)	3 (13)	1 (4)	1 (4)	12 (50)	7 (29)	3 (13)	2 (8)	2 (8)	24
General machinery	1 (14)	0 (0)	0 (0)	1 (14)	5 (71)	1 (14)	0 (0)	1 (14)	0 (0)	7
Electrical/Electronic machinery	24 (43)	9 (16)	4 (7)	11 (20)	23 (41)	9 (16)	3 (5)	6 (11)	0 (0)	56
Transportation machinery	17 (41)	1 (2)	8 (20)	8 (20)	17 (41)	7 (17)	3 (7)	1 (2)	3 (7)	41
Others	12 (32)	1 (3)	6 (16)	5 (13)	19 (50)	7 (18)	3 (8)	2 (5)	2 (5)	38
Manufacturing sector total	84 (40)	25 (12)	25 (12)	34 (16)	90 (42)	38 (18)	16 (8)	14 (7)	8 (4)	212
Trading	12 (21)	3 (5)	1 (2)	8 (14)	32 (57)	12 (21)	4 (7)	2 (4)	6 (11)	56
Retailing	1 (17)	1 (17)	0 (0)	0 (0)	5 (83)	0 (0)	0 (0)	0 (0)	0 (0)	6
Construction	1 (33)	0 (0)	0 (0)	1 (33)	2 (67)	0 (0)	0 (0)	0 (0)	0 (0)	3
Others	1 (33)	0 (0)	0 (0)	1 (33)	2 (67)	0 (0)	0 (0)	0 (0)	0 (0)	3
Non-manufacturing sector	15 (22)	4 (6)	1 (1)	10 (15)	41 (60)	12 (18)	4 (6)	2 (3)	6 (9)	68
Total	99 (35)	29 (10)	26 (9)	44 (16)	131 (47)	50 (18)	20 (7)	16 (6)	14 (5)	280

(Table 5-2) Exports in 2013 (full year)

Unit: No. of firms and (%)

Industry	Increase				No change	Decrease				Total
		More than 20%	10-20%	Less than 10%			Less than 10%	10-20%	More than 20%	
Food	5 (56)	1 (11)	0 (0)	4 (44)	3 (33)	1 (11)	0 (0)	1 (11)	0 (0)	9
Textiles	7 (58)	4 (33)	2 (17)	1 (8)	1 (8)	4 (33)	3 (25)	1 (8)	0 (0)	12
Chemicals	9 (35)	5 (19)	3 (12)	1 (4)	10 (38)	7 (27)	2 (8)	3 (12)	2 (8)	26
Steel/Non-ferrous metal	5 (20)	3 (12)	1 (4)	1 (4)	12 (48)	8 (32)	4 (16)	1 (4)	3 (12)	25
General machinery	0 (0)	0 (0)	0 (0)	0 (0)	5 (83)	1 (17)	0 (0)	1 (17)	0 (0)	6
Electrical/Electronic machinery	25 (45)	9 (16)	3 (5)	13 (23)	19 (34)	12 (21)	6 (11)	6 (11)	0 (0)	56
Transportation machinery	19 (46)	1 (2)	4 (10)	14 (34)	15 (37)	7 (17)	2 (5)	4 (10)	1 (2)	41
Others	13 (34)	1 (3)	6 (16)	6 (16)	18 (47)	7 (18)	3 (8)	2 (5)	2 (5)	38
Manufacturing sector total	83 (39)	24 (11)	19 (9)	40 (19)	83 (39)	47 (22)	20 (9)	19 (9)	8 (4)	213
Trading	16 (28)	3 (5)	2 (4)	11 (19)	30 (53)	11 (19)	2 (4)	7 (12)	2 (4)	57
Retailing	1 (17)	1 (17)	0 (0)	0 (0)	5 (83)	0 (0)	0 (0)	0 (0)	0 (0)	6
Construction	1 (33)	0 (0)	0 (0)	1 (33)	2 (67)	0 (0)	0 (0)	0 (0)	0 (0)	3
Others	1 (33)	0 (0)	0 (0)	1 (33)	2 (67)	0 (0)	0 (0)	0 (0)	0 (0)	3
Non-manufacturing sector	19 (28)	4 (6)	2 (3)	13 (19)	39 (57)	11 (16)	2 (3)	7 (10)	2 (3)	69
Total	102 (36)	28 (10)	21 (7)	53 (19)	122 (43)	58 (21)	22 (8)	26 (9)	10 (4)	282

(Table 5-3) Exports in 2014 (first half)

Unit: No. of firms and (%)

Industry	Increase				No change	Decrease				Total
		More than 20%	10-20%	Less than 10%			Less than 10%	10-20%	More than 20%	
Food	2 (22)	1 (11)	1 (11)	0 (0)	5 (56)	2 (22)	2 (22)	0 (0)	0 (0)	9
Textiles	5 (42)	1 (8)	1 (8)	3 (25)	4 (33)	3 (25)	3 (25)	0 (0)	0 (0)	12
Chemicals	11 (44)	4 (16)	2 (8)	5 (20)	9 (36)	5 (20)	4 (16)	0 (0)	1 (4)	25
Steel/Non-ferrous metal	7 (28)	1 (4)	4 (16)	2 (8)	16 (64)	2 (8)	0 (0)	0 (0)	2 (8)	25
General machinery	2 (33)	0 (0)	1 (17)	1 (17)	3 (50)	1 (17)	0 (0)	0 (0)	1 (17)	6
Electrical/Electronic machinery	29 (51)	9 (16)	7 (12)	13 (23)	24 (42)	4 (7)	3 (5)	1 (2)	0 (0)	57
Transportation machinery	14 (35)	1 (3)	4 (10)	9 (23)	18 (45)	8 (20)	4 (10)	3 (8)	1 (3)	40
Others	17 (44)	2 (5)	10 (26)	5 (13)	18 (46)	4 (10)	3 (8)	1 (3)	0 (0)	39
Manufacturing sector total	87 (41)	19 (9)	30 (14)	38 (18)	97 (46)	29 (14)	19 (9)	5 (2)	5 (2)	213
Trading	24 (44)	4 (7)	2 (4)	18 (33)	28 (52)	2 (4)	1 (2)	0 (0)	1 (2)	54
Retailing	2 (33)	2 (33)	0 (0)	0 (0)	4 (67)	0 (0)	0 (0)	0 (0)	0 (0)	6
Construction	1 (33)	0 (0)	1 (33)	0 (0)	1 (33)	1 (33)	1 (33)	0 (0)	0 (0)	3
Others	1 (33)	0 (0)	0 (0)	1 (33)	2 (67)	0 (0)	0 (0)	0 (0)	0 (0)	3
Non-manufacturing sector	28 (42)	6 (9)	3 (5)	19 (29)	35 (53)	3 (5)	2 (3)	0 (0)	1 (2)	66
Total	115 (41)	25 (9)	33 (12)	57 (20)	132 (47)	32 (11)	21 (8)	5 (2)	6 (2)	279

6. PROSPECTIVE FUTURE MARKETS

For the prospective future markets (check all that apply), the predominant response was “Indonesia” (45%) followed by “Vietnam” (38%), “Myanmar” (35%). By Industry, the predominant response by manufacturing was “India” (33%), and for non-manufacturing “Cambodia” (33%) and then “Laos” (27%) (Table 6).

(Table 6) Prospective future markets (check all that apply)

Unit: No. of firms and (%)																								
Industry	Indonesia	Vietnam	Myanmar	India	Japan	Cambodia	Laos	Malaysia	Philippines	Middle East	Europe	China	Latin America	USA	Africa	Singapore	Bangladesh	Oceania	Pakistan	Sri Lanka	Others	Total	No. of firms	
Manufacturing	Food	5 (50)	4 (40)	2 (20)	1 (10)	5 (50)	1 (10)	0 (0)	2 (20)	3 (30)	1 (10)	2 (20)	1 (10)	1 (10)	2 (20)	0 (0)	2 (20)	0 (0)	1 (10)	0 (0)	0 (0)	1 (10)	34	10
	Textile	5 (42)	7 (58)	4 (33)	4 (33)	1 (8)	2 (17)	0 (0)	3 (25)	0 (0)	2 (17)	1 (8)	2 (17)	1 (8)	0 (0)	0 (0)	1 (8)	3 (25)	2 (17)	0 (0)	0 (0)	0 (0)	38	12
	Chemical	10 (40)	15 (60)	7 (28)	12 (48)	5 (20)	3 (12)	5 (20)	9 (36)	6 (24)	3 (12)	4 (16)	2 (8)	5 (20)	3 (12)	4 (16)	2 (8)	1 (4)	1 (4)	0 (0)	0 (0)	0 (0)	97	25
	Steel/Non-ferrous metal	11 (46)	11 (46)	7 (29)	9 (38)	1 (4)	4 (17)	3 (13)	1 (4)	2 (8)	1 (4)	1 (4)	0 (0)	1 (4)	1 (4)	0 (0)	0 (0)	1 (4)	0 (0)	0 (0)	0 (0)	0 (0)	54	24
	General machinery	5 (63)	4 (50)	1 (13)	2 (25)	0 (0)	0 (0)	1 (13)	2 (25)	0 (0)	2 (25)	0 (0)	1 (13)	1 (13)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (13)	20	8
	Electrical/electronic machinery	24 (44)	15 (28)	19 (35)	16 (30)	18 (33)	11 (20)	11 (20)	7 (13)	10 (19)	6 (11)	7 (13)	11 (20)	8 (15)	5 (9)	8 (15)	5 (9)	3 (6)	0 (0)	0 (0)	0 (0)	1 (2)	185	54
	Transportation machinery	26 (60)	13 (30)	8 (19)	16 (37)	7 (16)	3 (7)	4 (9)	4 (9)	4 (9)	4 (9)	5 (12)	4 (9)	7 (16)	6 (14)	1 (2)	0 (0)	0 (0)	2 (5)	2 (5)	0 (0)	1 (2)	117	43
	Others	14 (38)	16 (43)	13 (35)	10 (27)	11 (30)	9 (24)	5 (14)	6 (16)	2 (5)	4 (11)	7 (19)	2 (5)	0 (0)	4 (11)	2 (5)	1 (3)	2 (5)	1 (3)	1 (3)	0 (0)	2 (5)	112	37
Manufacturing sector total	100 (47)	85 (40)	61 (29)	70 (33)	48 (23)	33 (15)	29 (14)	34 (16)	27 (13)	23 (11)	27 (13)	23 (11)	24 (11)	21 (10)	15 (7)	11 (5)	10 (5)	7 (3)	3 (1)	0 (0)	6 (3)	657	213	
Non-manufacturing	Trading	24 (41)	18 (31)	27 (47)	20 (34)	8 (14)	17 (29)	15 (26)	9 (16)	5 (9)	9 (16)	2 (3)	4 (7)	2 (3)	2 (3)	3 (5)	4 (7)	4 (7)	0 (0)	0 (0)	0 (0)	0 (0)	155	58
	Retailing	0 (0)	2 (33)	4 (67)	1 (17)	1 (17)	2 (33)	1 (17)	2 (33)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (17)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	13	6
	Construction/Civil engineering	2 (67)	2 (67)	2 (67)	0 (0)	0 (0)	0 (0)	0 (0)	1 (33)	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	7	3
	Others	2 (33)	3 (50)	5 (83)	1 (17)	1 (17)	5 (83)	4 (67)	0 (0)	2 (33)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	21	6
	Non-manufacturing sector total	28 (38)	25 (34)	38 (52)	22 (30)	10 (14)	24 (33)	20 (27)	12 (16)	8 (11)	9 (12)	2 (3)	4 (5)	2 (3)	2 (3)	3 (4)	5 (7)	4 (5)	0 (0)	0 (0)	0 (0)	0 (0)	196	73
	Total	128 (45)	110 (38)	99 (35)	92 (32)	58 (20)	57 (20)	49 (17)	46 (16)	35 (12)	32 (11)	29 (10)	27 (9)	26 (9)	23 (8)	18 (6)	16 (6)	14 (5)	7 (2)	3 (1)	0 (0)	6 (2)	853	286
This time	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	-	-			
Previous rank	1	3	2	4	5	6	8	7	13	11	12	9	15	10	18	14	17	16	19	-	-			
Last but one time	1	2	3	4	5	6	9	7	14	12	11	8	15	10	-	12	-	16						

(Note1) Europe includes Russia

(Note 2) Africa, Bangladesh, Pakistan, and Sri Lanka were added since the previous survey

7. BUSINESS BASE FOR THAILAND-PLUS-ONE POLICY

Regarding Thai-plus-one base outside of Thailand, the percentage of firms responding “already established” was 28%, while “Considering” was 19%. Percentage of firms responding “Not Considering” was 54% (Table 7-1).

Regarding countries in which operating bases already exist or are expected, Indonesia ranked top with the percentage of 59%, followed by “Vietnam” (42%) and “Myanmar”(34%) (Table 7-2).

Regarding Thai-Plus-One bases already established, or with plans to develop in the economic corridor, the predominant response was “Yangon area (including Thilawa)” (31%) on the East-West economic corridor, followed by “Myanmar (including Dawei)” (22%) and “Phnom Penh” (18%) on the Southern economic corridor (Table 7-3).

※ The “Thailand-Plus-One” is the movements by the firms based in Thailand which are expanding their manufacturing base etc. toward neighboring countries and adjusting for the best by division of labor and complement.

(Table 7-1) Overseas bases outside Thailand relevant to the Thailand-Plus-One policy

Unit : No. of firms and (%)

Industry		Already founded		Considering		Not considering		No. of firms
Manufacturing	Food	2	(20)	2	(20)	6	(60)	10
	Textiles	3	(25)	1	(8)	8	(67)	12
	Chemicals	9	(36)	4	(16)	12	(48)	25
	Steel/Non-ferrous metal	7	(26)	1	(4)	19	(70)	27
	General machinery	3	(38)	1	(13)	4	(50)	8
	Electrical/electronic machinery	10	(18)	13	(23)	34	(60)	57
	Transportation machinery	12	(27)	11	(25)	21	(48)	44
	Others	9	(24)	5	(14)	23	(62)	37
	Manufacturing sector total	55	(25)	38	(17)	127	(58)	220
Non-manufacturing	Trading	22	(39)	13	(23)	22	(39)	57
	Retailing	1	(14)	2	(29)	4	(57)	7
	Finance/Insurance/Securities	0	(0)	0	(0)	1	(100)	1
	Construction/Civil engineering	1	(33)	1	(33)	1	(33)	3
	Transportation/Communications	1	(33)	0	(0)	2	(67)	3
	Others	2	(50)	1	(25)	1	(25)	4
	Non-manufacturing sector total	27	(36)	17	(23)	31	(41)	75
Total		82	(28)	55	(19)	158	(54)	295

(Table 7-2) Countries in which bases already exist or are expected (check all that apply)

Unit: No. of firms and (%)

Industry		Indonesia	Vietnam	Myanmar	Cambodia	Laos	Philippines	Bangladesh	Pakistan	India	Sri Lanka	Others	Total	No. of firms
Manufacturing	Food	1 (25)	2 (50)	0 (0)	1 (25)	1 (25)	0 (0)	0 (0)	0 (0)	0 (0)	1 (25)	1 (25)	7	4
	Textiles	3 (75)	1 (25)	0 (0)	0 (0)	1 (25)	0 (0)	1 (25)	0 (0)	0 (0)	0 (0)	0 (0)	6	4
	Chemicals	11 (85)	9 (69)	2 (15)	0 (0)	0 (0)	2 (15)	0 (0)	0 (0)	0 (0)	1 (8)	1 (8)	26	13
	Steel/Non-ferrous metal	5 (63)	4 (50)	1 (13)	0 (0)	0 (0)	0 (0)	1 (13)	1 (13)	0 (0)	0 (0)	0 (0)	12	8
	General machinery	3 (75)	2 (50)	0 (0)	0 (0)	0 (0)	1 (25)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	6	4
	Electrical/electronic machinery	12 (57)	7 (33)	9 (43)	7 (33)	5 (24)	1 (5)	2 (10)	0 (0)	2 (10)	1 (5)	1 (5)	47	21
	Transportation machinery	18 (82)	9 (41)	5 (23)	2 (9)	1 (5)	3 (14)	0 (0)	2 (9)	0 (0)	0 (0)	0 (0)	40	22
	Others	5 (33)	6 (40)	3 (20)	2 (13)	3 (20)	1 (7)	1 (7)	0 (0)	0 (0)	1 (7)	1 (7)	23	15
	Manufacturing sector total	58 (64)	40 (44)	20 (22)	12 (13)	11 (12)	8 (9)	5 (5)	3 (3)	2 (2)	4 (4)	4 (4)	167	91
Non-manufacturing	Trading	19 (53)	14 (39)	20 (56)	9 (25)	6 (17)	5 (14)	2 (6)	1 (3)	0 (0)	0 (0)	0 (0)	76	36
	Retailing	1 (50)	1 (50)	2 (100)	1 (50)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	6	2
	Construction/Civil engineering	1 (50)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2	2
	Transportation/Communications	0 (0)	1 (100)	1 (100)	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3	1
	Others	0 (0)	0 (0)	3 (100)	2 (67)	1 (33)	0 (0)	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	7	3
	Non-manufacturing sector total	21 (48)	17 (39)	26 (59)	13 (30)	8 (18)	5 (11)	3 (7)	1 (2)	0 (0)	0 (0)	0 (0)	94	44
Total		79 (59)	57 (42)	46 (34)	25 (19)	19 (14)	13 (10)	8 (6)	4 (3)	2 (1)	4 (3)	4 (3)	261	135
Ranking this time		1	2	3	4	5	6	7	8	9	10	—		
Previous ranking		1	2	3	5	7	4	6	9	8	10	—		

(Table 7-3) Thai-Plus-One bases already established, or with plans to develop in the economic corridor (check all that apply)

Unit: No. of firms and (%)

Ranking		Manufacturing									Non-manufacturing					Total
		Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Transportation/Communications	Others	Non-manufacturing sector total	
1	Yangon area (including Thilawa) [EWEC]	0 (0)	0 (0)	2 (33)	1 (14)	0 (0)	3 (18)	2 (13)	4 (44)	12 (21)	11 (42)	2 (67)	1 (100)	2 (67)	16 (48)	28 (31)
2	Myanmar (including Dawei) [SEC]	0 (0)	0 (0)	2 (33)	2 (29)	0 (0)	3 (18)	2 (13)	2 (22)	11 (19)	9 (35)	0 (0)	0 (0)	0 (0)	9 (27)	20 (22)
3	Phnom Penh [SEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3 (18)	2 (13)	2 (22)	7 (12)	6 (23)	1 (33)	1 (100)	1 (33)	9 (27)	16 (18)
4	Vientiane [CEC]	0 (0)	1 (100)	1 (17)	2 (29)	0 (0)	3 (18)	1 (7)	1 (11)	9 (16)	4 (15)	1 (33)	0 (0)	1 (33)	6 (18)	15 (17)
5	Da Nang [EWEC]	1 (100)	0 (0)	0 (0)	2 (29)	0 (0)	3 (18)	2 (13)	0 (0)	8 (14)	1 (4)	0 (0)	0 (0)	0 (0)	1 (3)	9 (10)
6	Ho Chi Minh [SEC]	0 (0)	0 (0)	0 (0)	2 (29)	1 (100)	1 (6)	1 (7)	1 (11)	6 (11)	2 (8)	0 (0)	0 (0)	0 (0)	2 (6)	8 (9)
7	Savannakhet [EWEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	1 (7)	1 (11)	3 (5)	1 (4)	0 (0)	0 (0)	1 (33)	2 (6)	5 (6)
8	Poipet [SEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	1 (7)	0 (0)	2 (4)	1 (4)	0 (0)	0 (0)	0 (0)	1 (3)	3 (3)
8	Koh Kong [SCEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	1 (7)	0 (0)	2 (4)	1 (4)	0 (0)	0 (0)	0 (0)	1 (3)	3 (3)
10	Sihanoukville [SCEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (8)	0 (0)	0 (0)	0 (0)	2 (6)	2 (2)
11	Myawaddy [EWEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	0 (0)	0 (0)	1 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)
11	Pa An [EWEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (7)	0 (0)	1 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)
11	Vũng Tàu [SEC]	0 (0)	0 (0)	1 (17)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)
14	Bavet [SEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
14	Huai Xai [SNEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
14	Tachileik [SNEC]	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
—	Other	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3 (20)	0 (0)	3 (5)	2 (8)	0 (0)	0 (0)	0 (0)	2 (6)	5 (6)
Total		1	1	6	9	1	20	17	11	66	40	4	2	5	51	117
No. of firms		1	1	6	7	1	17	15	9	57	26	3	1	3	33	90 (100)

(Note) EWEC: East-West Economic Corridor, SEC: Southern Economic Corridor, CEC: Central Economic Corridor, SCEC: Southern-Coastal Economic Corridor, SNEC: South-North Economic Corridor

8. EXCHANGE RATES USED IN BUSINESS PLANS

(1) Thai Baht/ US dollar

Regarding the exchange rate used in business plans (Thai Baht/ US dollar), the predominant response was “A range between not less than 31.0 but less than 31.5 (31.6%) followed by “Not less than 30.0 but less than 30.5” (16.5%). The median rate was 31.0 (Table 8-1).

(Table 8-1) Exchange rates used in business plan (Thai Baht/ US dollar)

Unit: Thai Baht/ US dollar, No. of firms and (%)														
Industry Thai Baht/ US dollar	Manufacturing									Non-manufacturing				Grand total
	Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Others	Non-manufacturing	
Not less than 29.0 but less than 29.5	0	0	0	1	0	2	1	0	4	0	0	0	0	4 (1.9)
Not less than 29.5 but less than 30.0	0	0	0	0	0	2	5	1	8	1	1	0	2	10 (4.9)
Not less than 30.0 but less than 30.5	2	2	5	3	2	6	3	5	28	6	0	0	6	34 (16.5)
Not less than 30.5 but less than 31.0	0	4	2	0	0	8	2	2	18	3	0	0	3	21 (10.2)
Not less than 31.0 but less than 31.5	1	2	8	8	1	16	9	6	51	12	0	2	14	65 (31.6)
Not less than 31.5 but less than 32.0	2	1	2	4	0	6	4	7	26	5	0	0	5	31 (15.0)
Not less than 32.0 but less than 32.5	0	3	3	3	0	6	4	3	22	8	1	1	10	32 (15.5)
Not less than 32.5 but less than 33.0	0	0	1	0	0	0	0	0	1	0	0	0	0	1 (0.5)
Not less than 33.0 but less than 33.5	0	0	2	0	1	0	0	0	3	1	1	0	2	5 (2.4)
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)
Not less than 34.0 but less than 34.5	0	0	0	0	0	0	0	0	0	1	0	0	1	1 (0.5)
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)
Not less than 35.0 but less than 35.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 35.5 but less than 36.0	0	0	0	0	0	0	0	0	0	1	0	0	1	1 (0.5)
Not less than 36.0 but less than 36.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 36.5 but less than 37.0	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 37.0 but less than 37.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 37.5 but less than 38.0	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 38.0 but less than 38.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
No. of firms	6	12	23	19	4	46	28	24	162	38	3	3	44	206
Average	30.47	31.09	31.24	29.69	31.00	30.71	30.82	29.79	30.56	30.63	31.70	31.40	30.76	30.60
Median	30.50	30.95	31.00	31.15	30.50	31.00	31.00	31.00	31.00	31.00	32.00	31.00	31.00	31.00
Mode	30.00	31.00	31.00	31.00	30.00	31.00	31.00	31.00	31.00	31.00	#N/A	31.00	31.00	31.00

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

(At the time of previous survey)

Industry Thai Baht/ US dollar	Manufacturing									Non-manufacturing				Grand total
	Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Others	Non-manufacturing	
Average	30.07	30.63	30.02	29.90	30.17	30.43	30.21	30.42	30.24	30.34	31.00	31.00	30.45	30.28
Median	30.00	30.00	30.00	30.00	30.00	30.40	30.00	30.00	30.00	30.00	#N/A	30.00	30.00	30.00
Mode	30.00	30.00	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 excluding deviation due to the number of respondents or the lowest/highest value as much as possible. The median indicates the value that has the largest number of respondents. If there is more than one value that has the largest number of respondents, "#N/A" (not applicable) is entered.

(2) Japanese Yen/ Thai Baht

Regarding the exchange rate used in business plans (Japanese Yen/ Thai Baht), the predominant response was “Not less than 3.1 but less than 3.2” (32.4%), followed by “Not less than 3.0 but less than 3.1” (28.0%). The median rate was 3.10 (Table 8-2).

(Table 8-2) Exchange rates used in business plan (Japanese Yen/ Thai Baht)

Unit: Japanese Yen/ Thai Baht, No. of firms and (%)

Industry Japanese Yen/ Thai Baht	Manufacturing									Non-manufacturing				Grand total
	Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Others	Non-manufacturing sector total	
Not less than 2.1 but less than 2.2	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
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	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 2.4 but less than 2.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 2.5 but less than 2.6	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 2.6 but less than 2.7	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 2.7 but less than 2.8	0	0	0	0	0	1	0	0	1	2	0	0	2	3 (1.2)
Not less than 2.8 but less than 2.9	0	0	0	0	1	0	2	0	3	1	1	0	2	5 (2.0)
Not less than 2.9 but less than 3.0	0	1	1	0	0	2	1	1	6	3	0	0	3	9 (3.6)
Not less than 3.0 but less than 3.1	1	0	7	3	4	10	10	11	46	16	2	6	24	70 (28.0)
Not less than 3.1 but less than 3.2	2	4	8	12	1	16	11	11	65	12	1	3	16	81 (32.4)
Not less than 3.2 but less than 3.3	3	4	6	8	1	18	11	7	58	8	2	1	11	69 (27.6)
Not less than 3.3 but less than 3.4	1	0	2	0	0	1	2	0	6	4	0	0	4	10 (4.0)
Not less than 3.4 but less than 3.5	1	1	0	0	0	0	0	1	3	0	0	0	0	3 (1.2)
Not less than 3.5 but less than 3.6	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
No. of firms	8	10	24	23	7	48	37	31	188	46	6	10	62	250
Average	3.19	3.15	3.12	3.13	3.02	3.11	3.10	3.10	3.11	3.07	3.07	3.06	3.07	3.10
Median	3.20	3.15	3.10	3.10	3.00	3.10	3.10	3.10	3.10	3.10	3.09	3.00	3.08	3.10
Mode	3.20	3.10	3.00	3.10	3.00	3.20	3.00	3.00	3.20	3.00	3.00	3.00	3.00	3.20

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

(At the time of previous survey)

Industry Japanese Yen/ Thai Baht	Manufacturing									Non-manufacturing				Grand total
	Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Others	Non-manufacturing sector total	
Average	3.09	3.00	3.01	3.09	2.97	2.97	2.98	2.91	2.99	2.97	2.90	3.04	2.98	2.98
Median	3.25	3.00	3.00	3.10	3.00	3.00	3.00	3.00	3.00	3.00	2.90	3.00	3.00	3.00
Mode	3.40	3.00	3.00	3.20	3.00	3.00	3.00	3.00	3.00	3.00	3.00	2.80	3.00	3.00

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

9. PROCUREMENT SOURCE OF PARTS/ MATERIALS

The ratio of procurement sources in 2013 (simple average of the respondents) was 56.1% for “ASEAN”, including 47.1% for “Thailand” (Table 9-1).

Regarding the ratio of planned procurement sources in 2014, the percentage for “Thailand”, “ASEAN (other than Thailand)”, and “China” increased slightly from 2013, and the percentage for “Japan” is expected to decrease slightly (Table 9-2).

(Table 9-1) Suppliers of parts and materials in 2013

Unit : %

Unit : %

Industry		ASEAN			Japan	China	Others	Total	No. of firms
		Thailand	ASEAN (other than Thailand)						
Manufacturing	Food	75.9	73.9	2.0	7.9	3.4	12.8	100.0	10
	Textiles	68.7	64.3	4.4	11.2	9.5	10.7	100.0	12
	Chemicals	52.2	37.7	14.4	33.6	1.8	12.4	100.0	26
	Steel/Non-ferrous metal	36.5	31.7	4.8	48.6	6.7	8.1	100.0	27
	General machinery	56.6	55.1	1.4	35.4	7.9	0.1	100.0	7
	Electrical/electronic machinery	52.7	44.7	8.0	31.4	9.8	6.1	100.0	52
	Transportation machinery	67.4	61.7	5.7	29.0	2.6	1.0	100.0	43
	Others	59.5	54.4	5.2	28.9	1.5	10.1	100.0	36
	Manufacturing average	58.7	52.9	5.7	28.3	5.4	7.7	100.0	213
Non-manufacturing	Trading	50.8	36.3	14.6	39.4	3.8	5.9	100.0	56
	Retailing	41.8	40.0	1.8	55.3	0.1	2.8	100.0	6
	Construction	60.0	54.0	6.0	26.0	14.0	0.0	100.0	5
	Others	61.7	35.0	26.7	11.7	20.0	6.7	100.0	3
	Non-manufacturing average	53.6	41.3	12.2	33.1	9.5	3.9	100.0	70
Total		56.1	47.1	9.0	30.7	7.4	5.8	100.0	283

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

(Table 9-2) Suppliers of parts and materials in 2014

Unit : %

Industry		ASEAN			Japan	China	Others	Total	No. of firms
		Thailand	ASEAN (other than Thailand)						
Manufacturing	Food	75.8	73.8	2.0	7.4	3.5	13.3	100.0	10
	Textiles	70.6	66.2	4.4	8.8	10.8	9.8	100.0	12
	Chemicals	55.0	40.1	14.9	32.5	2.4	10.1	100.0	26
	Steel/Non-ferrous metal	38.5	33.1	5.4	47.6	7.2	6.7	100.0	26
	General machinery	58.6	57.1	1.4	32.1	9.3	0.0	100.0	7
	Electrical/electronic machinery	53.5	45.7	7.8	29.6	10.5	6.4	100.0	52
	Transportation machinery	68.4	63.3	5.1	27.3	3.2	1.2	100.0	43
	Others	59.9	53.7	6.3	27.2	1.4	11.4	100.0	36
	Manufacturing average	60.0	54.1	5.9	26.6	6.0	7.4	100.0	212
Non-manufacturing	Trading	53.6	38.5	15.2	34.4	4.2	7.8	100.0	55
	Retailing	45.9	41.7	4.3	51.2	1.8	1.2	100.0	6
	Construction	57.5	47.5	10.0	25.0	17.5	0.0	100.0	4
	Others	65.0	36.7	28.3	10.0	18.3	6.7	100.0	3
	Non-manufacturing average	55.5	41.1	14.4	30.1	10.5	3.9	100.0	68
Total		57.8	47.6	10.2	28.4	8.2	5.6	100.0	280

(Note) Same as Table 9-1.

10. CHALLENGES FOR CORPORATE MANAGEMENT

Regarding challenges for corporate management (check all that apply), the predominant response was “Severe competition by competitors” (68%), followed by “Increases in total labor cost” (54%) and “Lack of human resources at manager-level” (54%).

By industry, other major response in the manufacturing sector was “Foreign exchange fluctuation” (33%), and in the non-manufacturing sector “Job hopping by employees” (30%) (Table-10).

(Table 10) Challenges for corporate management (check all that apply)

Unit: No. of firms and (%)

Previous ranking	Ranking this time		Manufacturing								Non-manufacturing								Grand total
			Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/ Insurance/ Securities	Construction/ Civil engineering	Transportation/ Communications	Others	Non-manufacturing sector total	
1	1	Severe competition by competitors	4 (40)	6 (50)	19 (76)	20 (71)	6 (75)	46 (75)	32 (71)	27 (66)	160 (70)	38 (61)	5 (50)	12 (60)	23 (92)	23 (77)	15 (58)	116 (67)	276 (68)
2	2	Increases in total labor cost	4 (40)	6 (50)	12 (48)	22 (79)	6 (75)	38 (62)	37 (82)	26 (63)	151 (66)	24 (39)	4 (40)	4 (20)	9 (36)	18 (60)	9 (35)	68 (39)	219 (54)
3	3	Lack of human resources for manager-level	5 (50)	6 (50)	15 (60)	16 (57)	3 (38)	26 (43)	32 (71)	18 (44)	121 (53)	27 (44)	6 (60)	10 (50)	18 (72)	23 (77)	13 (50)	97 (56)	218 (54)
6	4	Foreign exchange fluctuation	5 (50)	5 (42)	6 (24)	11 (39)	3 (38)	24 (39)	11 (24)	11 (27)	76 (33)	29 (47)	0 (0)	0 (0)	1 (4)	1 (3)	3 (12)	34 (20)	110 (27)
5	5	Job hopping by employees	2 (20)	4 (33)	5 (20)	4 (14)	0 (0)	12 (20)	8 (18)	9 (22)	44 (19)	19 (31)	2 (20)	5 (25)	5 (20)	13 (43)	8 (31)	52 (30)	96 (24)
7	6	Lack of human resources for workers/ staff-levels	3 (30)	2 (17)	6 (24)	1 (4)	0 (0)	14 (23)	7 (16)	7 (17)	40 (17)	12 (19)	6 (60)	4 (20)	10 (40)	12 (40)	5 (19)	49 (28)	89 (22)
8	7	Hike in material prices	6 (60)	2 (17)	9 (36)	6 (21)	1 (13)	22 (36)	12 (27)	8 (20)	66 (29)	10 (16)	1 (10)	0 (0)	5 (20)	4 (13)	1 (4)	21 (12)	87 (22)
10	8	Changes in products/ users' needs	2 (20)	2 (17)	6 (24)	6 (21)	3 (38)	11 (18)	8 (18)	9 (22)	47 (20)	11 (18)	4 (40)	3 (15)	2 (8)	7 (23)	4 (15)	31 (18)	78 (19)
9	9	Quality of management	0 (0)	6 (50)	5 (20)	4 (14)	2 (25)	14 (23)	12 (27)	10 (24)	53 (23)	4 (6)	3 (30)	1 (5)	3 (12)	9 (30)	4 (15)	24 (14)	77 (19)
11	10	Excessive employment	0 (0)	1 (8)	1 (4)	3 (11)	0 (0)	3 (5)	8 (18)	2 (5)	18 (8)	1 (2)	0 (0)	0 (0)	0 (0)	2 (7)	1 (4)	4 (2)	22 (5)
—	11	Flood disaster prevention	0 (0)	1 (8)	1 (4)	1 (4)	0 (0)	2 (3)	5 (11)	2 (5)	12 (5)	3 (5)	0 (0)	0 (0)	0 (0)	2 (7)	0 (0)	5 (3)	17 (4)
13	12	Difficulty in obtaining financial support	0 (0)	0 (0)	0 (0)	0 (0)	2 (25)	5 (8)	3 (7)	0 (0)	10 (4)	3 (5)	1 (10)	1 (5)	0 (0)	1 (3)	0 (0)	6 (3)	16 (4)
12	13	Difficulty in collecting money from customers	0 (0)	0 (0)	1 (4)	0 (0)	0 (0)	0 (0)	1 (2)	3 (7)	5 (2)	3 (5)	0 (0)	3 (15)	3 (12)	2 (7)	0 (0)	11 (6)	16 (4)
14	14	Excessive capital investment	0 (0)	0 (0)	0 (0)	0 (0)	1 (13)	1 (2)	5 (11)	1 (2)	8 (3)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	8 (2)
16	15	Infringement of intellectual property rights	0 (0)	1 (8)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	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)	1 (4)	0 (0)	0 (0)	3 (5)	0 (0)	1 (2)	5 (2)	7 (11)	0 (0)	0 (0)	0 (0)	1 (3)	3 (12)	11 (6)	16 (4)
Total			31	42	87	94	27	221	181	134	817	191	32	43	79	118	66	529	1,346
No. of firms			10	12	25	28	8	61	45	41	230	62	10	20	25	30	26	173	403 (100)

(Note) No. 4 choice in previous time "Reduction in unit sales price" has been deleted in this survey.

11. REQUESTS TO THE THAI GOVERNMENT

Regarding requests to the Thai government (check all that apply), the predominant response was “Stability of the political situation and security” (73%), followed by “Customs-related systems and their implementation” (46%), “Development of infrastructure in the Bangkok metropolitan area” (44%), and “Implementation of flood prevention measures” (36%). By industry, the predominant response in the manufacturing sector was “Improvement of education/ human resource development” (32%), and in the non-manufacturing sector “Relaxation of the Foreign Business Act” (38%) (Table 11).

(Table 11) Requests to the Thai government (check all that apply)

Unit: No. of firms and (%)

Previous ranking	Ranking this time		Manufacturing								Non-manufacturing								Grand total
			Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/ Insurance/ Securities	Construction/ Civil engineering	Transportation/ Communications	Others	Non-manufacturing sector total	
2	1	Stability of the political situation and security	8 (80)	10 (83)	15 (56)	20 (69)	5 (63)	46 (75)	36 (80)	32 (80)	172 (74)	40 (65)	10 (91)	15 (71)	15 (60)	24 (80)	20 (74)	124 (70)	296 (73)
1	2	Customs-related systems and their implementation	3 (30)	2 (17)	17 (63)	11 (38)	5 (63)	41 (67)	28 (62)	14 (35)	121 (52)	36 (58)	3 (27)	1 (5)	7 (28)	12 (40)	6 (22)	65 (37)	186 (46)
4	3	Development of infrastructure in the Bangkok metropolitan	2 (20)	6 (50)	10 (37)	13 (45)	6 (75)	23 (38)	21 (47)	16 (40)	97 (42)	31 (50)	4 (36)	11 (52)	9 (36)	13 (43)	15 (56)	83 (47)	180 (44)
10	4	Implementation of flood prevention measures	3 (30)	8 (67)	6 (22)	8 (28)	2 (25)	28 (46)	25 (56)	15 (38)	95 (41)	23 (37)	4 (36)	5 (24)	3 (12)	10 (33)	6 (22)	51 (29)	146 (36)
3	5	Improvement of education/human resource development	1 (10)	3 (25)	6 (22)	12 (41)	1 (13)	16 (26)	19 (42)	17 (43)	75 (32)	16 (26)	1 (9)	7 (33)	3 (12)	15 (50)	11 (41)	53 (30)	128 (31)
5	6	Relaxation of the Foreign Business Act	4 (40)	1 (8)	5 (19)	4 (14)	3 (38)	12 (20)	7 (16)	6 (15)	42 (18)	26 (42)	3 (27)	11 (52)	10 (40)	10 (33)	7 (26)	67 (38)	109 (27)
6	7	Stability in foreign exchange rates	3 (30)	4 (33)	3 (11)	12 (41)	3 (38)	20 (33)	13 (29)	11 (28)	69 (30)	16 (26)	0 (0)	2 (10)	1 (4)	2 (7)	4 (15)	25 (14)	94 (23)
7	8	Work permit/visa-related issues	0 (0)	1 (8)	6 (22)	4 (14)	1 (13)	11 (18)	5 (11)	10 (25)	38 (16)	14 (23)	3 (27)	8 (38)	11 (44)	6 (20)	11 (41)	53 (30)	91 (22)
8	9	Implementation of tax-related systems	2 (20)	4 (33)	7 (26)	5 (17)	1 (13)	16 (26)	8 (18)	7 (18)	50 (22)	7 (11)	2 (18)	4 (19)	5 (20)	6 (20)	4 (15)	28 (16)	78 (19)
—	10	Promotion of economic ties e.g. FTA, EPA etc.	2 (20)	1 (8)	7 (26)	8 (28)	2 (25)	10 (16)	13 (29)	4 (10)	47 (20)	15 (24)	1 (9)	1 (5)	2 (8)	7 (23)	1 (4)	27 (15)	74 (18)
9	11	Prevention of labor disputes	0 (0)	2 (17)	9 (33)	6 (21)	1 (13)	11 (18)	25 (56)	6 (15)	60 (26)	2 (3)	1 (9)	0 (0)	1 (4)	8 (27)	1 (4)	13 (7)	73 (18)
11	12	Broad-based infrastructure development linking Thailand with neighboring countries	1 (10)	5 (42)	5 (19)	3 (10)	1 (13)	9 (15)	5 (11)	4 (10)	33 (14)	13 (21)	0 (0)	4 (19)	3 (12)	10 (33)	3 (11)	33 (19)	66 (16)
—	13	Development of the communication infrastructure	0 (0)	0 (0)	4 (15)	5 (17)	3 (38)	12 (20)	7 (16)	2 (5)	33 (14)	7 (11)	2 (18)	2 (10)	3 (12)	10 (33)	5 (19)	29 (16)	62 (15)
—	14	Promotion of employment of foreign labour	0 (0)	0 (0)	1 (4)	2 (7)	1 (13)	1 (2)	4 (9)	9 (23)	18 (8)	1 (2)	1 (9)	3 (14)	8 (32)	7 (23)	3 (11)	23 (13)	41 (10)
13	15	Promotion of regional operating headquarters function (e.g. ROH, IPC)	0 (0)	1 (8)	0 (0)	2 (7)	0 (0)	5 (8)	0 (0)	1 (3)	9 (4)	3 (5)	0 (0)	1 (5)	0 (0)	3 (10)	3 (11)	10 (6)	19 (5)
—	16	Promotion of measures against the low birth rate and aging population	0 (0)	0 (0)	1 (4)	1 (3)	0 (0)	3 (5)	1 (2)	2 (5)	8 (3)	3 (5)	0 (0)	1 (5)	0 (0)	2 (7)	0 (0)	6 (3)	14 (3)
-	-	Others	0 (0)	1 (8)	1 (4)	1 (3)	0 (0)	0 (0)	0 (0)	1 (3)	4 (2)	7 (11)	0 (0)	0 (0)	1 (4)	0 (0)	1 (4)	9 (5)	13 (3)
Total			29	49	103	117	35	264	217	157	971	260	35	76	82	145	101	699	1,670
No. of firms			10	12	27	29	8	61	45	40	232	62	11	21	25	30	27	176	408 (100)

(Note) “Promotion of economic ties, e.g. FTA, EPA etc.”, “Development of communication infrastructure”, “Promotion of employment of foreign labour”, “Promotion of measures against the low birth rate and aging population” have been added to this survey.

12. EFFECT OF FLOODS AND MEASURES

(1) Effect of the Floods in 2013

Regarding the effect of the floods in 2013, the predominant response was “Disruption of commuting” (25%), followed by “Affected logistics” (21%), and “Close down of operation” (8%) (Table 12-1).

(Table 12-1) Effect of the Floods in 2013

Unit: No. of firms and (%)

Industry		Disruption of commuting	Affected logistics	Close down of operation	Increase in flood measures cost	Reputational risk	Other	None	No. of firms
Manufacturing	Food	0 (0)	2 (20)	0 (0)	1 (10)	0 (0)	0 (0)	7 (70)	10
	Textiles	4 (33)	4 (33)	4 (33)	1 (8)	0 (0)	1 (8)	6 (50)	12
	Chemicals	9 (33)	3 (11)	0 (0)	1 (4)	0 (0)	4 (15)	13 (48)	27
	Steel/Non-ferrous metal	7 (24)	5 (17)	0 (0)	3 (10)	0 (0)	1 (3)	15 (52)	29
	General machinery	2 (25)	3 (38)	0 (0)	1 (13)	0 (0)	0 (0)	4 (50)	8
	Electrical/Electronic machinery	15 (25)	15 (25)	9 (15)	3 (5)	7 (12)	4 (7)	29 (48)	60
	Transportation machinery	19 (42)	10 (22)	7 (16)	6 (13)	1 (2)	3 (7)	17 (38)	45
	Others	14 (35)	8 (20)	2 (5)	2 (5)	2 (5)	1 (3)	19 (48)	40
	Manufacturing sector total	70 (30)	50 (22)	22 (10)	18 (8)	10 (4)	14 (6)	110 (48)	231
Non-manufacturing	Trading	11 (18)	14 (23)	4 (6)	2 (3)	2 (3)	2 (3)	39 (63)	62
	Retailing	0 (0)	2 (18)	0 (0)	0 (0)	0 (0)	1 (9)	8 (73)	11
	Finance/Insurance/Securities	5 (24)	1 (5)	2 (10)	1 (5)	2 (10)	4 (19)	11 (52)	21
	Construction/Civil engineering	5 (21)	2 (8)	1 (4)	0 (0)	0 (0)	5 (21)	12 (50)	24
	Transportation/Communications	8 (27)	14 (47)	3 (10)	1 (3)	2 (7)	4 (13)	10 (33)	30
	Other	2 (7)	1 (3)	0 (0)	1 (3)	1 (3)	3 (10)	23 (79)	29
	Non-manufacturing sector total	31 (18)	34 (19)	10 (6)	5 (3)	7 (4)	19 (11)	103 (58)	177
Total		101 (25)	84 (21)	32 (8)	23 (6)	17 (4)	(33) (8)	213 (52)	408

(2) Requests for Flood Prevention Measures

Regarding requests for flood prevention measures, the predominant response was “Quick provision of accurate disaster information” (63%), followed by “Flood prevention measures for roads around industrial parks” (55%), and “Construction of floodways and diversion channels” (46%) (Table 12-2).

(Table 12-2) Requests for Flood Measures

Unit: No. of firms and (%)

Industry		Quick provision of accurate disaster information	Flood prevention measures for roads around industrial parks	Construction of floodways and diversion channels	Appropriate water resource management	Construction of permanent flood banks	Improvement of the casualty insurance system	Construction of water reservoirs	Others	No. of firms
Manufacturing	Food	6 (60)	2 (20)	4 (40)	3 (30)	1 (10)	5 (50)	0 (0)	0 (0)	10
	Textiles	7 (58)	7 (58)	7 (58)	4 (33)	4 (33)	4 (33)	2 (17)	0 (0)	12
	Chemicals	12 (46)	15 (58)	11 (42)	8 (31)	6 (23)	5 (19)	2 (8)	0 (0)	26
	Steel/Non-ferrous metal	16 (55)	20 (69)	16 (55)	11 (38)	8 (28)	4 (14)	4 (14)	1 (3)	29
	General machinery	3 (43)	5 (71)	4 (57)	2 (29)	2 (29)	2 (29)	1 (14)	0 (0)	7
	Electrical/electronic machinery	35 (57)	37 (61)	30 (49)	34 (56)	18 (30)	17 (28)	10 (16)	0 (0)	61
	Transportation machinery	31 (69)	36 (80)	26 (58)	21 (47)	13 (29)	10 (22)	6 (13)	0 (0)	45
	Others	26 (65)	26 (65)	18 (45)	18 (45)	4 (10)	7 (18)	4 (10)	1 (3)	40
	Manufacturing sector total	136 (59)	148 (64)	116 (50)	101 (44)	56 (24)	(54) (23)	29 (13)	2 (1)	230
Non-manufacturing	Trading	40 (68)	29 (49)	22 (37)	24 (41)	15 (25)	8 (14)	7 (12)	1 (2)	59
	Retailing	7 (70)	2 (20)	6 (60)	4 (40)	3 (30)	3 (30)	1 (10)	0 (0)	10
	Finance/Insurance/Securities	15 (71)	9 (43)	9 (43)	8 (38)	3 (14)	5 (24)	2 (10)	1 (5)	21
	Construction/Civil engineering	14 (58)	8 (33)	7 (29)	10 (42)	6 (25)	4 (17)	5 (21)	1 (4)	24
	Transportation/Communication	21 (72)	15 (52)	13 (45)	14 (48)	7 (24)	12 (41)	4 (14)	2 (7)	29
	Others	18 (64)	8 (29)	12 (43)	12 (43)	9 (32)	3 (11)	0 (0)	0 (0)	28
	Non-manufacturing sector total	115 (67)	71 (42)	69 (40)	72 (42)	43 (25)	(35) (20)	19 (11)	5 (3)	171
Total		251 (63)	219 (55)	185 (46)	173 (43)	99 (25)	(89) (22)	48 (12)	7 (2)	401

13. LABOUR SHORTAGE AND MEASURES

(1) Labour Shortage

Regarding the labor situation, a total of 52% of the firms reported labor shortage; 5% reported “High shortage” and 47% reported “Slight shortage”. Especially, 62% of the non-manufacturing firms reported labor shortage; 7% reported “High shortage” and 55% reported “Slight shortage” (Table 13-1).

Regarding labour shortage (check all that apply), the predominant response was “Manager” (64%).

(Table 13-1) Labor situation

Unit: No. of firms and (%)							
Industry		High shortage	Slight shortage	No shortage	Slight excess	Highly excessive	No. of firms
Manufacturing	Food	1 (10)	4 (40)	4 (40)	1 (10)	0 (0)	10
	Textiles	0 (0)	8 (67)	2 (17)	2 (17)	0 (0)	12
	Chemicals	1 (4)	11 (41)	14 (52)	1 (4)	0 (0)	27
	Steel/Non-ferrous metal	0 (0)	11 (38)	14 (48)	3 (10)	1 (3)	29
	General machinery	0 (0)	3 (38)	5 (63)	0 (0)	0 (0)	8
	Electrical/electronic machinery	3 (5)	24 (39)	29 (48)	5 (8)	0 (0)	61
	Transportation machinery	0 (0)	20 (43)	15 (33)	11 (24)	0 (0)	46
	Others	1 (2)	15 (37)	22 (54)	3 (7)	0 (0)	41
	Manufacturing sector	6 (3)	96 (41)	105 (45)	26 (11)	1 (0)	234
Non-manufacturing	Trading	2 (3)	30 (47)	31 (48)	1 (2)	0 (0)	64
	Retailing	2 (18)	7 (64)	2 (18)	0 (0)	0 (0)	11
	Finance/Insurance/Securities	2 (9)	13 (57)	7 (30)	1 (4)	0 (0)	23
	Construction/Civil engineering	3 (12)	15 (58)	7 (27)	1 (4)	0 (0)	26
	Transportation/Communication	3 (10)	16 (53)	9 (30)	2 (7)	0 (0)	30
	Others	1 (3)	19 (66)	8 (28)	1 (3)	0 (0)	29
	Non-manufacturing sector	13 (7)	100 (55)	64 (35)	6 (3)	0 (0)	183
Total		19 (5)	196 (47)	169 (41)	32 (8)	1 (0)	417

(Table 13-2) Labor shortage (Check all that apply)

		Unit: No. of firms and (%)				
Industry		Manager	Staff	Engineer	Worker	No. of firms
Manufacturing	Food	2 (40)	0 (0)	0 (0)	5 (100)	5
	Textiles	5 (71)	2 (29)	2 (29)	3 (43)	7
	Chemicals	9 (69)	4 (31)	4 (31)	3 (23)	13
	Steel/Non-ferrous metal	6 (60)	2 (20)	3 (30)	5 (50)	10
	General machinery	2 (67)	0 (0)	0 (0)	1 (33)	3
	Electrical/electronic machinery	13 (46)	5 (18)	10 (36)	13 (46)	28
	Transportation machinery	17 (81)	6 (29)	7 (33)	6 (29)	21
	Others	9 (56)	4 (25)	7 (44)	7 (44)	16
	Manufacturing sector total	63 (61)	23 (22)	33 (32)	43 (42)	103
Non-manufacturing	Trading	18 (56)	22 (69)	5 (16)	3 (9)	32
	Retailing	4 (44)	3 (33)	0 (0)	6 (67)	9
	Finance/Insurance/Securities	11 (79)	9 (64)	1 (7)	0 (0)	14
	Construction/Civil engineering	10 (56)	2 (11)	11 (61)	6 (33)	18
	Transportation/Communication	16 (80)	10 (50)	1 (5)	12 (60)	20
	Others	15 (79)	9 (47)	4 (21)	0 (0)	19
	Non-manufacturing sector total	74 (66)	55 (49)	22 (20)	27 (24)	112
Total		137 (64)	78 (36)	55 (26)	70 (33)	215

(2) Measures to Address Labor Shortage

Regarding measures to address labor shortage (check all that apply), the predominant response was “Increase in salary/wage” (59%), followed by “Enhancement of welfare benefits” (48%), “Enforcement of education/ training” (47%), and “Automation of production/ optimization of the operation” (21%). By industry, the predominant response in manufacturing was “Enhancement of welfare benefits” (52%), and in non-manufacturing “Increase in salary/wage” (70%) (Table13-3).

(Table13-3) Measures to address Labor Shortage (Check all that apply)

Ranking		Manufacturing									Non-manufacturing					Grand total
		Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Transportation/ Communications	Others	Non-manufacturing total	
1	Increase in salary/wage	3 (60)	2 (29)	6 (50)	5 (45)	3 (100)	13 (48)	8 (38)	9 (56)	49 (48)	25 (78)	4 (50)	14 (70)	11 (58)	77 (70)	126 (59)
2	Enhancement of welfare benefits	3 (60)	2 (29)	7 (58)	5 (45)	1 (33)	14 (52)	12 (57)	9 (56)	53 (52)	15 (47)	3 (38)	9 (45)	12 (63)	49 (45)	102 (48)
3	Enforcement of education/ training	2 (40)	3 (43)	8 (67)	4 (36)	1 (33)	13 (48)	11 (52)	8 (50)	50 (49)	9 (28)	6 (75)	12 (60)	8 (42)	50 (45)	100 (47)
4	Automation of production/ optimization of operations	3 (60)	0 (0)	6 (50)	4 (36)	0 (0)	13 (48)	8 (38)	5 (31)	39 (38)	2 (6)	0 (0)	0 (0)	2 (11)	6 (5)	45 (21)
5	Increase in bonus	0 (0)	0 (0)	6 (50)	1 (9)	0 (0)	4 (15)	6 (29)	3 (19)	20 (20)	6 (19)	0 (0)	3 (15)	1 (5)	18 (16)	38 (18)
6	Employment of temporary workers	1 (20)	2 (29)	1 (8)	2 (18)	0 (0)	7 (26)	0 (0)	0 (0)	13 (13)	1 (3)	3 (38)	5 (25)	2 (11)	13 (12)	26 (12)
7	Employment of foreign workers	2 (40)	1 (14)	1 (8)	0 (0)	1 (33)	2 (7)	3 (14)	1 (6)	11 (11)	1 (3)	0 (0)	3 (15)	1 (5)	8 (7)	19 (9)
8	Extension of the retirement age	0 (0)	2 (29)	1 (8)	1 (9)	0 (0)	2 (7)	2 (10)	0 (0)	8 (8)	2 (6)	0 (0)	4 (20)	0 (0)	10 (9)	18 (8)
9	Whole or partial transfer of business to neighboring countries	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	1 (1)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)
—	Other	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	0 (0)	1 (1)	1 (3)	0 (0)	1 (5)	1 (5)	4 (4)	5 (2)
Total		14	12	36	22	6	68	51	36	245	62	16	51	38	235	480
No. of firms		5	7	12	11	3	27	21	16	102	32	8	20	19	110	212 (100)

14. MEASURES TO ADDRESS THE LOWER BIRTHRATE AND AGING POPULATION IN THAILAND

Regarding measures to address the lower birthrate and aging population in Thailand, the predominant response was “Enhancement of the social security system” (55%), followed by “Improvement in the birth rate” (48%), “Improvement in the education level” (41%), “Utilization of foreigners” (22%), and “Promotion of automation/ IT” (22%) (Table 14).

(Table14) Measures to address the lower birthrate and aging population in Thailand (check all that apply)

Unit: No. of firms and (%)

Ranking		Manufacturing								Non-manufacturing								Grand total
		Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/Securities/Insurance	Construction/Civil engineering	Transportation/Communications	Others	Non-manufacturing total	
1	Enhancement of the social security system	8 (80)	9 (75)	13 (48)	12 (41)	6 (75)	39 (64)	24 (52)	23 (56)	134 (57)	31 (50)	7 (70)	14 (67)	8 (32)	18 (60)	16 (55)	94 (53)	228 (55)
2	Improvement in the birth rate	7 (70)	2 (17)	16 (59)	15 (52)	3 (38)	25 (41)	22 (48)	22 (54)	112 (48)	33 (53)	7 (70)	11 (52)	12 (48)	13 (43)	11 (38)	87 (49)	199 (48)
3	Improvement in the education level	1 (10)	9 (75)	14 (52)	11 (38)	6 (75)	21 (34)	21 (46)	20 (49)	103 (44)	24 (39)	6 (60)	4 (19)	7 (28)	12 (40)	12 (41)	65 (37)	168 (41)
4	Utilization of foreigners	3 (30)	2 (17)	4 (15)	6 (21)	2 (25)	17 (28)	12 (26)	7 (17)	53 (23)	16 (26)	2 (20)	5 (24)	6 (24)	6 (20)	4 (14)	39 (22)	92 (22)
5	Promotion of automation/ IT	2 (20)	3 (25)	7 (26)	7 (24)	1 (13)	18 (30)	13 (28)	10 (24)	61 (26)	8 (13)	0 (0)	4 (19)	3 (12)	10 (33)	3 (10)	28 (16)	89 (22)
6	Economic integration with neighboring countries	1 (10)	3 (25)	4 (15)	7 (24)	1 (13)	13 (21)	12 (26)	9 (22)	50 (21)	17 (27)	2 (20)	4 (19)	4 (16)	4 (13)	5 (17)	36 (20)	86 (21)
7	Development of infrastructure for the aged	0 (0)	3 (25)	5 (19)	4 (14)	5 (63)	5 (8)	11 (24)	7 (17)	40 (17)	16 (26)	2 (20)	8 (38)	2 (8)	4 (13)	7 (24)	39 (22)	79 (19)
8	Conversion of the industrial structure	0 (0)	3 (25)	4 (15)	4 (14)	1 (13)	3 (5)	7 (15)	3 (7)	25 (11)	10 (16)	2 (20)	2 (10)	4 (16)	5 (17)	3 (10)	26 (15)	51 (12)
9	Increase of added value in products and services	1 (10)	0 (0)	3 (11)	5 (17)	0 (0)	4 (7)	3 (7)	3 (7)	19 (8)	8 (13)	0 (0)	4 (19)	4 (16)	3 (10)	1 (3)	20 (11)	39 (9)
10	Globalization of corporations	0 (0)	1 (8)	2 (7)	2 (7)	0 (0)	4 (7)	3 (7)	1 (2)	13 (6)	3 (5)	0 (0)	2 (10)	1 (4)	2 (7)	3 (10)	11 (6)	24 (6)
—	Other	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (2)	1 (0)	1 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)	2 (0)
Total		23	35	72	73	25	149	128	106	611	167	28	58	51	77	65	446	1,057
No. of firms		10	12	27	29	8	61	46	41	234	62	10	21	25	30	29	177	411 (100)

15. MEASURES REQUIRED TO STRENGTHEN THE CONNECTIVITY WITH NEIGHBORING COUNTRIES

Regarding measures required to strengthen the connectivity with neighboring countries, the predominant response was “Promotion of economic ties e.g. FTA, EPA” (53%), followed by “Improvement of infrastructure, e.g. sea ports, air ports, borders, roads etc.” (52%), “Improvement in the Customs system/ procedures (Refund system of duties, the AEO (Authorized Economic Operator (AEO) Programs))” (44%), and “Reduction in tariff rates” (40%) (Table 15).

(Table 15) Measures required to strengthen the links with neighboring countries (check all that apply)

Unit: No. of firms and (%)

Chart No. of firms and (%)																		
Ranking		Manufacturing									Non-manufacturing						Grand total	
		Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/ Securities/ Insurance	Construction/ Civil engineering	Transportation/ Communications	Others		Non-manufacturing total
1	Promotion of economic ties e.g. FTA, EPA	6 (60)	8 (67)	14 (52)	14 (54)	6 (75)	30 (51)	28 (62)	22 (56)	128 (57)	39 (65)	4 (40)	7 (33)	11 (48)	12 (43)	10 (34)	83 (49)	211 (53)
2	Improvement of infrastructure, e.g. sea ports, air ports, borders, roads etc.	3 (30)	10 (83)	15 (56)	12 (46)	3 (38)	29 (49)	20 (44)	24 (62)	116 (51)	30 (50)	5 (50)	13 (62)	8 (35)	20 (71)	15 (52)	91 (53)	207 (52)
3	Improvement in Customs system/ procedures (Refund system of duties, the AEO (Authorized Economic Operator (AEO) Programs))	4 (40)	4 (33)	13 (48)	13 (50)	2 (25)	32 (54)	23 (51)	10 (26)	101 (45)	35 (58)	1 (10)	7 (33)	7 (30)	15 (54)	9 (31)	74 (43)	175 (44)
4	Reduction in tariff rates	3 (30)	5 (42)	12 (44)	13 (50)	4 (50)	24 (41)	24 (53)	20 (51)	105 (46)	28 (47)	4 (40)	1 (5)	6 (26)	4 (14)	9 (31)	52 (30)	157 (40)
5	Promotion of the AEC	1 (10)	5 (42)	9 (33)	6 (23)	3 (38)	23 (39)	12 (27)	12 (31)	71 (31)	28 (47)	2 (20)	14 (67)	8 (35)	13 (46)	9 (31)	74 (43)	145 (37)
6	Improvement of immigration procedures (cars/ people) at borders	3 (30)	2 (17)	3 (11)	2 (8)	1 (13)	19 (32)	7 (16)	4 (10)	41 (18)	18 (30)	5 (50)	4 (19)	3 (13)	19 (68)	5 (17)	54 (32)	95 (24)
7	One-Stop service at borders	2 (20)	2 (17)	7 (26)	2 (8)	0 (0)	12 (20)	5 (11)	6 (15)	36 (16)	13 (22)	5 (50)	5 (24)	2 (9)	14 (50)	5 (17)	44 (26)	80 (20)
8	Early implementation of the single-window	0 (0)	4 (33)	5 (19)	2 (8)	0 (0)	8 (14)	4 (9)	4 (10)	27 (12)	9 (15)	0 (0)	5 (24)	1 (4)	7 (25)	1 (3)	23 (13)	50 (13)
9	Improvement in procedures for import control regulations e.g. quarantine, licenses	3 (30)	0 (0)	3 (11)	0 (0)	1 (13)	5 (8)	3 (7)	3 (8)	18 (8)	13 (22)	1 (10)	3 (14)	1 (4)	6 (21)	1 (3)	25 (15)	43 (11)
10	Expansion of traffic border crossing agreements	1 (10)	1 (8)	2 (7)	1 (4)	1 (13)	4 (7)	3 (7)	2 (5)	15 (7)	10 (17)	0 (0)	2 (10)	3 (13)	9 (32)	1 (3)	25 (15)	40 (10)
11	Supervision of intellectual property right infringement	1 (10)	1 (8)	0 (0)	1 (4)	0 (0)	7 (12)	4 (9)	5 (13)	19 (8)	6 (10)	1 (10)	1 (5)	1 (4)	2 (7)	6 (21)	17 (10)	36 (9)
—	Other	0 (0)	0 (0)	0 (0)	1 (4)	0 (0)	1 (2)	1 (2)	2 (5)	5 (2)	0 (0)	0 (0)	0 (0)	0 (0)	2 (7)	0 (0)	2 (1)	7 (2)
Total		27	42	83	67	21	194	134	114	682	229	28	62	51	123	71	564	1,246
No. of firms		10	12	27	26	8	59	45	39	226	60	10	21	23	28	29	171	397 (100)

16. ASEAN ECONOMIC COMMUNITY (AEC)

(1) Items expected for improvement/ abolition through elimination of non-tariff barriers

Regarding items expected for improvement/ abolition through ASEAN countries' elimination of non-tariff barriers by establishment of the AEC by the end of 2015 (check all that apply), the predominant response was "Disparity of custom classification or valuation by customs" (51%), followed by "Charges and internal duties other than Custom's duty" (48%), "Deposit or advance payment requirement by the Customs" (30%), and "Conditions for permission/license application for specific products" (21%) (Table 16-1).

(Table 16-1) Items expected for improvement/ abolition through elimination of non-tariff barriers (Check all that apply)

Table 10-1) Items expected for improvement/abolition through elimination of non-tariff barriers (Check all that apply)

Unit: No. of firms and (%)

Ranking		Manufacturing										Non-manufacturing							Grand total
		Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/ Securities/ Insurance	Construction/ Civil engineering	Transportation/ Communications	Others	Non-manufacturing total		
1	Disparity of custom classification or valuation by customs	6 (67)	8 (67)	13 (50)	12 (48)	5 (71)	31 (56)	29 (67)	15 (47)	119 (57)	38 (63)	3 (38)	0 (0)	2 (10)	18 (67)	7 (32)	68 (44)	187 (51)	
2	Charges and internal duties other than Custom's duty	4 (44)	6 (50)	13 (50)	10 (40)	4 (57)	24 (44)	22 (51)	16 (50)	99 (47)	28 (47)	7 (88)	8 (44)	12 (60)	7 (26)	12 (55)	74 (48)	173 (48)	
3	Deposit or advance payment requirement by the Customs	3 (33)	4 (33)	7 (27)	3 (12)	3 (43)	15 (27)	14 (33)	6 (19)	55 (26)	25 (42)	3 (38)	1 (6)	6 (30)	11 (41)	7 (32)	53 (34)	108 (30)	
4	Conditions for permission/license application for specific products	2 (22)	2 (17)	7 (27)	3 (12)	0 (0)	13 (24)	10 (23)	10 (31)	47 (22)	15 (25)	0 (0)	2 (11)	1 (5)	8 (30)	2 (9)	28 (18)	75 (21)	
5	Financial controls on foreign currency allocation control, remittances, and banking licenses	1 (11)	2 (17)	3 (12)	2 (8)	2 (29)	11 (20)	5 (12)	4 (13)	30 (14)	9 (15)	0 (0)	12 (67)	5 (25)	5 (19)	5 (23)	36 (23)	66 (18)	
6	Monopolistic measures e.g. national industry and general sales agents	0 (0)	0 (0)	2 (8)	0 (0)	1 (14)	7 (13)	3 (7)	4 (13)	17 (8)	9 (15)	0 (0)	3 (17)	1 (5)	5 (19)	3 (14)	21 (14)	38 (10)	
7	Price controls with anti-dumping and offset measures etc.	1 (11)	0 (0)	3 (12)	7 (28)	1 (14)	6 (11)	4 (9)	3 (9)	25 (12)	7 (12)	0 (0)	0 (0)	1 (5)	2 (7)	0 (0)	10 (6)	35 (10)	
8	Procedural requirements, e.g. pre-export inspection and quarantine	1 (11)	1 (8)	2 (8)	1 (4)	0 (0)	10 (18)	2 (5)	1 (3)	18 (9)	9 (15)	0 (0)	0 (0)	1 (5)	4 (15)	2 (9)	16 (10)	34 (9)	
9	Technical requirements, e.g. compulsory specification, standards, labeling, and packaging	1 (11)	1 (8)	3 (12)	3 (12)	0 (0)	7 (13)	5 (12)	3 (9)	23 (11)	6 (10)	0 (0)	0 (0)	1 (5)	2 (7)	1 (5)	10 (6)	33 (9)	
10	Quantitative control measures through import allocation etc.	1 (11)	0 (0)	1 (4)	5 (20)	1 (14)	6 (11)	4 (9)	4 (13)	22 (11)	5 (8)	0 (0)	0 (0)	0 (0)	3 (11)	0 (0)	8 (5)	30 (8)	
11	Import control measures	0 (0)	0 (0)	0 (0)	2 (8)	0 (0)	7 (13)	3 (7)	1 (3)	13 (6)	2 (3)	1 (13)	0 (0)	0 (0)	3 (11)	0 (0)	6 (4)	19 (5)	
—	Other	0 (0)	0 (0)	0 (0)	1 (4)	0 (0)	0 (0)	2 (5)	1 (3)	4 (2)	0 (0)	0 (0)	2 (11)	2 (10)	1 (4)	0 (0)	5 (3)	9 (2)	
Total		20	24	54	49	17	137	103	68	472	153	14	28	32	69	39	335	807	
No. of firms		9	12	26	25	7	55	43	32	209	60	8	18	20	27	22	155	364 (100)	

(2) Service industries for which liberalization of investment is required within the ASEAN countries

Regarding service industries for which liberalization of investment is required within the ASEAN countries, the predominant response (check all that apply) was “Engineering service” (26%), followed by “Wholesale” (20%), “Banking and other financial services (excluding insurance)” (19%), and “Goods logistics service” (19%) (Table 16-2).

(Table 16-2) Service industries for which liberalization of investment is required within ASEAN countries (Check all that apply)

Unit: No. of firms and (%)

Unit: No. of firms and (%)																		
Ranking		Manufacturing									Non-manufacturing						Grand total	
		Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/ Securities/ Insurance	Construction/ Civil engineering	Transportation/ Communications	Others		Non-manufacturing total
1	Engineering service	0 (0)	3 (30)	4 (22)	4 (25)	1 (17)	20 (39)	16 (50)	10 (32)	58 (34)	16 (29)	0 (0)	1 (5)	9 (36)	2 (7)	0 (0)	28 (17)	86 (26)
2	Wholesale	2 (29)	2 (20)	5 (28)	1 (6)	1 (17)	10 (20)	4 (13)	4 (13)	29 (17)	29 (52)	4 (44)	3 (14)	0 (0)	0 (0)	2 (10)	38 (23)	67 (20)
3	Banking and other financial services (excluding insurance)	0 (0)	2 (20)	3 (17)	4 (25)	1 (17)	13 (25)	5 (16)	3 (10)	31 (18)	9 (16)	0 (0)	14 (67)	2 (8)	2 (7)	4 (19)	31 (19)	62 (19)
3	Goods logistics service	2 (29)	4 (40)	1 (6)	3 (19)	0 (0)	6 (12)	5 (16)	6 (19)	27 (16)	9 (16)	2 (22)	3 (14)	0 (0)	21 (70)	0 (0)	35 (22)	62 (19)
5	Professional services e.g. legal, accounting, taxation, and medical	1 (14)	2 (20)	4 (22)	3 (19)	3 (50)	5 (10)	8 (25)	8 (26)	34 (20)	8 (14)	1 (11)	3 (14)	2 (8)	3 (10)	5 (24)	22 (14)	56 (17)
5	Retail	1 (14)	2 (20)	2 (11)	1 (6)	3 (50)	8 (16)	3 (9)	3 (10)	23 (13)	19 (34)	7 (78)	3 (14)	1 (4)	1 (3)	2 (10)	33 (20)	56 (17)
7	Communication service	1 (14)	2 (20)	1 (6)	5 (31)	0 (0)	9 (18)	6 (19)	2 (6)	26 (15)	7 (13)	0 (0)	1 (5)	2 (8)	8 (27)	3 (14)	21 (13)	47 (14)
8	Construction and related engineering service	1 (14)	2 (20)	0 (0)	3 (19)	1 (17)	0 (0)	1 (3)	10 (32)	18 (11)	5 (9)	0 (0)	2 (10)	15 (60)	4 (13)	2 (10)	28 (17)	46 (14)
9	Insurance and related service	0 (0)	1 (10)	0 (0)	3 (19)	0 (0)	8 (16)	1 (3)	4 (13)	17 (10)	5 (9)	1 (11)	8 (38)	2 (8)	4 (13)	1 (5)	21 (13)	38 (11)
10	Environmental services (waste water, waste treatment, sanitation)	0 (0)	2 (20)	5 (28)	3 (19)	3 (50)	10 (20)	2 (6)	2 (6)	27 (16)	6 (11)	0 (0)	0 (0)	2 (8)	1 (3)	0 (0)	9 (6)	36 (11)
11	Rental/ leasing service	1 (14)	0 (0)	0 (0)	4 (25)	0 (0)	7 (14)	2 (6)	1 (3)	15 (9)	10 (18)	0 (0)	3 (14)	1 (4)	3 (10)	1 (5)	18 (11)	33 (10)
12	Computer related service	0 (0)	0 (0)	3 (17)	0 (0)	1 (17)	5 (10)	3 (9)	0 (0)	12 (7)	6 (11)	0 (0)	1 (5)	1 (4)	7 (23)	3 (14)	18 (11)	30 (9)
13	Research and development service	1 (14)	1 (10)	1 (6)	0 (0)	1 (17)	8 (16)	9 (28)	4 (13)	25 (15)	3 (5)	0 (0)	0 (0)	0 (0)	1 (3)	0 (0)	4 (2)	29 (9)
14	Real estate service	0 (0)	2 (20)	1 (6)	0 (0)	1 (17)	2 (4)	5 (16)	4 (13)	15 (9)	2 (4)	1 (11)	2 (10)	3 (12)	2 (7)	2 (10)	12 (7)	27 (8)
15	Hotel/ restaurant service	1 (14)	0 (0)	0 (0)	3 (19)	0 (0)	1 (2)	2 (6)	1 (3)	8 (5)	4 (7)	0 (0)	3 (14)	0 (0)	2 (7)	1 (5)	10 (6)	18 (5)
16	Education service	1 (14)	0 (0)	1 (6)	0 (0)	1 (17)	3 (6)	0 (0)	3 (10)	9 (5)	4 (7)	0 (0)	2 (10)	0 (0)	0 (0)	0 (0)	6 (4)	15 (5)
17	Health related/ social services (hospitals and social services)	0 (0)	0 (0)	1 (6)	0 (0)	1 (17)	2 (4)	1 (3)	4 (13)	9 (5)	1 (2)	0 (0)	3 (14)	0 (0)	0 (0)	0 (0)	4 (2)	13 (4)
18	Travel related service	0 (0)	0 (0)	0 (0)	0 (0)	1 (17)	1 (2)	1 (3)	1 (3)	4 (2)	0 (0)	0 (0)	1 (5)	0 (0)	2 (7)	5 (24)	8 (5)	12 (4)
19	Travel/ transportation service	0 (0)	0 (0)	0 (0)	1 (6)	0 (0)	1 (2)	1 (3)	0 (0)	3 (2)	0 (0)	0 (0)	1 (5)	0 (0)	4 (13)	2 (10)	7 (4)	10 (3)
20	Entertainment/ culture/ sports service	0 (0)	0 (0)	1 (6)	0 (0)	0 (0)	1 (2)	0 (0)	1 (3)	3 (2)	1 (2)	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	2 (1)	5 (2)
—	Other	0 (0)	0 (0)	1 (6)	1 (6)	0 (0)	3 (6)	0 (0)	0 (0)	5 (3)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	1 (5)	2 (1)	7 (2)
Total		12	25	34	39	19	123	75	71	398	144	16	54	40	68	35	357	755
No. of firms		7	10	18	16	6	51	32	31	171	56	9	21	25	30	21	162	333 (100)

17. REGIONAL COMPREHENSIVE ECONOMIC PARTNERSHIP (RCEP)

Regarding issues expected for discussion by the RCEP (check all that apply), the predominant response was “Improvement of various systems (transparency of Customs procedures, relaxation of issuance of work visas)” (37%), followed by “Common certificate of origin among the 16 countries” (37%), “Simple and accessible rules of origin (Custom Tariff Change or Regional Value Content)” (36%).

By industry, in the manufacturing sector “Relaxation or elimination of non-tariff barriers” (35%), and in the non-manufacturing sector “Relaxation or elimination of the barriers for foreign ownership” (32%) (Table 17).

※ The Regional Comprehensive Economic Partnership (RCEP) is an area-wide economic partnership between sixteen nations, including the ten ASEAN nations and Japan, China, South Korea, India, Australia, and New Zealand, which was initiated by the leaders of the above nations at a leaders meeting held by ASEAN in November 2012. These nations are currently having negotiations with a goal to achieve a conclusion by the end of 2015.

(Table17) Issues expected for discussion by the RCEP (Check all that apply)

Unit: No. of firms and (%)

Ranking		Manufacturing								Non-manufacturing								Grand total
		Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electrical/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/ Securities/ Insurance	Construction/ Civil engineering	Transportation/ Communications	Others	Non-manufacturing total	
1	Improvement of various systems (transparency of Customs procedures, relaxation of issuance of work visas)	2 (29)	7 (58)	10 (40)	10 (45)	2 (29)	23 (41)	13 (31)	11 (31)	78 (38)	25 (27)	4 (44)	10 (53)	10 (43)	9 (36)	11 (44)	69 (36)	147 (37)
2	Common certificate of origin among the 16 countries	3 (43)	6 (50)	10 (40)	8 (36)	4 (57)	27 (48)	18 (43)	18 (51)	94 (46)	28 (31)	3 (33)	1 (5)	1 (4)	14 (56)	5 (20)	52 (27)	146 (37)
3	Simple and accessible rules of origin (Custom Tariff Change or Regional Value Content)	4 (57)	4 (33)	12 (48)	7 (32)	4 (57)	25 (45)	20 (48)	15 (43)	91 (44)	28 (31)	2 (22)	2 (11)	3 (13)	13 (52)	5 (20)	53 (28)	144 (36)
4	Participation of 16 countries i.e., ASEAN, Japan, China, Korea, India, Australia, and New Zealand	2 (29)	5 (42)	6 (24)	10 (45)	3 (43)	10 (18)	15 (36)	17 (49)	68 (33)	22 (24)	2 (22)	6 (32)	6 (26)	5 (20)	5 (20)	46 (24)	114 (29)
4	Relaxation or elimination of non-tariff barriers	3 (43)	1 (8)	9 (36)	5 (23)	6 (86)	27 (48)	14 (33)	8 (23)	73 (35)	24 (26)	3 (33)	5 (26)	2 (9)	4 (16)	3 (12)	41 (21)	114 (29)
6	Relaxation or elimination of the barriers for foreign ownership	2 (29)	0 (0)	4 (16)	3 (14)	2 (29)	17 (30)	5 (12)	6 (17)	39 (19)	19 (21)	3 (33)	11 (58)	7 (30)	11 (44)	11 (44)	62 (32)	101 (25)
7	Wider liberalization (elimination of tariffs) in product categories and trade volume	5 (71)	5 (42)	7 (28)	3 (14)	2 (29)	18 (32)	13 (31)	12 (34)	65 (32)	17 (19)	0 (0)	0 (0)	0 (0)	4 (16)	4 (16)	25 (13)	90 (23)
8	Improvement in protection of intellectual property rights	0 (0)	1 (8)	3 (12)	1 (5)	0 (0)	8 (14)	5 (12)	6 (17)	24 (12)	5 (5)	2 (22)	1 (5)	5 (22)	3 (12)	4 (16)	20 (10)	44 (11)
9	Relaxation or elimination of service trade barriers	0 (0)	0 (0)	1 (4)	1 (5)	2 (29)	7 (13)	0 (0)	3 (9)	14 (7)	9 (10)	1 (11)	5 (26)	2 (9)	4 (16)	4 (16)	25 (13)	39 (10)
10	Cumulative effect of added value according to the rules of origin	0 (0)	0 (0)	3 (12)	3 (14)	1 (14)	7 (13)	1 (2)	3 (9)	18 (9)	6 (7)	0 (0)	0 (0)	1 (4)	2 (8)	0 (0)	9 (5)	27 (7)
11	Economic and technical cooperation among the participating countries for a reduction in development disparity	0 (0)	0 (0)	0 (0)	0 (0)	1 (14)	3 (5)	0 (0)	2 (6)	6 (3)	1 (1)	0 (0)	1 (5)	1 (4)	1 (4)	1 (4)	5 (3)	11 (3)
12	Other	0 (0)	0 (0)	1 (4)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)	0 (0)	0 (0)	1 (5)	1 (4)	1 (4)	0 (0)	3 (2)	4 (1)
Total		21	29	66	51	27	172	104	101	571	184	20	43	39	71	53	410	981
No. of firms		7	12	25	22	7	56	42	35	206	91	9	19	23	25	25	192	398 (100)