

## Survey of Business Sentiment on Japanese Corporations in Thailand for Spring, the 1<sup>st</sup> half of 2011

JCC Economic Survey Team

### Survey Period

Questionnaire requesting date                      May 31, 2011

Questionnaire response deadline                      June 30, 2011

### Questionnaires response

This questionnaire was handed out to  
1,320 JCC member corporations.  
(Eleven governmental organizations are excluded.)

No. of firms responding this questionnaire  
373 corporations

The percentage of response  
28.3 percent

### No. of firms

Industry		No.
Manufacture	Food	19
	Textile	12
	Chemical	32
	Steel/ non-ferrous metal	29
	General machinery	15
	Electric/ electronics machinery	45
	Transportation machinery	48
	Others	36
Manufacturing sector total		236
Non-manufacture	Trading	46
	Retailer	11
	Finance/ insurance/ securities	18
	Construction/ civil engineering	16
	Transportation/ communication	27
	Others	19
	Non- manufacturing sector total	137
Total		373

### 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 second half of 2010 to the second half of 2011, the target period of this survey, business sentiment is anticipated to be continuously improving from the previous period (the first half of 2010) until the second half of 2010. The improvement may sharply slow down in the first half of 2011 due to the Great East Japan Earthquake, but it is expected to be rapidly increasing again in the second half of 2011. (Table 1-1)

**(Table 1-1) Business Sentiment**

**Unit: percent**

	Past Surveys										Survey this time		
	Result								Forecast		Result	Forecast	
	06H2	07H1	07H2	08H1	08H2	09H1	09H2	10H1	10H2	11H1	10H2	11H1	11H2
Improving	37	39	49	57	21	15	71	72	63	55	71	42	69
No change	25	30	27	23	15	17	14	15	22	34	18	21	21
Deteriorating	38	31	24	20	65	68	16	12	15	12	12	38	10
(Ref) DI	-1	8	25	37	-44	-53	55	60	48	43	59	4	59

(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 second half of 2010 (July – December)

The percentage of the firms reporting that business sentiment was “improving” decreased to 71 percent from the previous term (72 percent), whereas that reporting “deteriorating” remains at 12 percent from the previous term. As a result, diffusion Index (DI), which is the balance between “improving” and “deteriorating”, was calculated at +59 percent, minus 1 point from the previous term (+60). The overall DI has shown a positive figure for the third consecutive periods of the survey. (Table 1-1)

In the manufacturing sector, the DIs were continually increasing in the transportation machinery and textile industries, while the improvement seed decreased in the general machinery, steel/non-ferrous metal and electric/electronics machinery industries. As a result, the overall DI in the manufacturing sector was decreasing to +52 from the previous term (+67). For the non-manufacturing sector, decreased improvement seed in the transportation/communication industry has been compensated by increased improvement seed in the retailer and construction/civil engineering industry. As a result, the overall DI in the non-manufacturing sector was increasing by 22 points to +70 from the previous term (+48). (Table 1-2)

### (3) The first half of 2011 (January – June)

The percentage of the firms reporting that business performance are “improving” decreased by 29 points to 42 percent from the previous term (71 percent), whereas the percentage of the firms reporting “deteriorating” increased by 26 points to 38 percent from the previous term (12 percent). As a result, the overall DI of +4 was lower than the previous term (+59) (Table 1-1)

In the manufacturing sector, the DI turned to be “deteriorating” in several industries including transportation machinery, chemical and steel/non-ferrous metal. As a result, the overall DI of -7 was lower than the previous period (+52) by 59 points. In the non-manufacturing sector, the improvement rate is expected to be decreasing in all industries except construction/civil engineering. As a result of this, the overall DI of +23 was lower than the previous period (+70). (Table 1-2)

#### (4) The second half of 2011 (July – December)

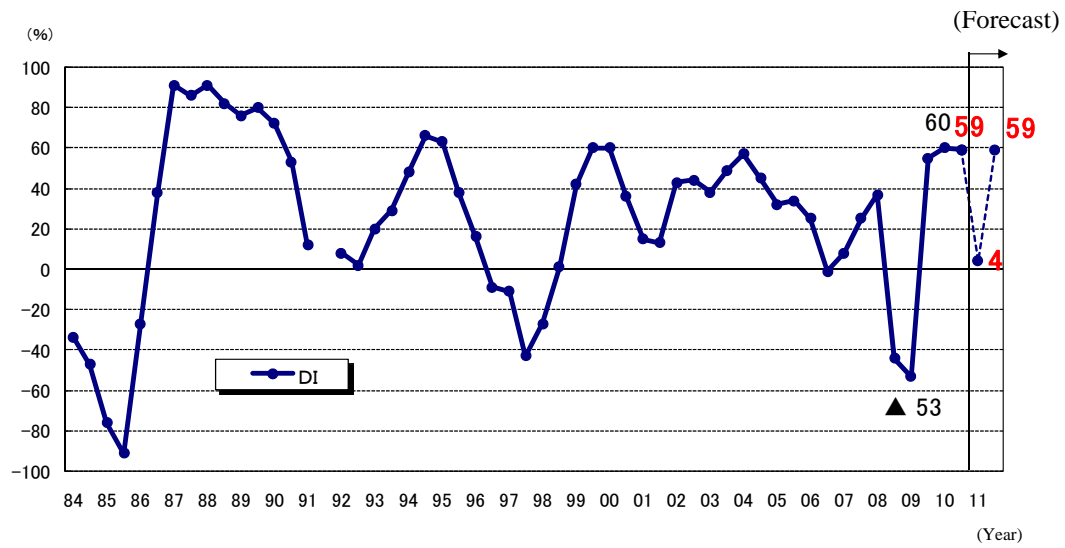
The percentage of the firms reporting that business performance was “improving” was increasing by 27 points to 69 percent from the previous term (42 percent), whereas the percentage of the firms reporting “deteriorating” fell by 28 points to 10 percent from the previous term (38 percent). As a result, the overall DI of +59 was higher than the previous term (+4). (Table 1-1)

In the manufacturing sector, the decreased improvement seed in the food and textile industries was compensated by the increased improvement seed in the other industries. As a result, the overall DI of +55 in the manufacturing sector was higher than the previous period (-7). In the non-manufacturing sector, the improvement seed is expected to be increasing in all the industries except construction/civil engineering. As a result, the overall DI in the non-manufacturing sector rose to +63 from the previous period (+23). (Table 1-2)

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

Industry		Past Surveys								Survey this time		
		Result						Forecast		Result	Forecast	
		07H2	08H1	08H2	09H1	09H2	10H1	10H2	11H1	10H2	11H1	11H2
Manufacture	Food	-15	13	27	33	54	0	13	0	0	57	26
	Textile	15	33	-28	-40	43	15	0	16	18	46	40
	Chemical	48	44	-62	-32	84	75	60	26	55	-26	53
	Steel/ non-ferrous metal	21	58	-70	-88	70	96	26	13	68	-10	57
	General machinery	-15	25	-50	-57	70	77	77	16	47	20	54
	Electric/ electronics machinery	11	18	-55	-35	74	65	27	40	38	4	50
	Transportation machinery	53	55	-46	-88	82	87	85	55	94	-52	84
	Others	41	39	-45	-68	45	62	43	37	42	-3	47
	Manufacturing sector total	28	38	-46	-57	69	67	48	33	52	-7	55
Non-manufacture	Trading	28	68	-57	-43	61	83	55	60	83	0	62
	Retailer	60	75	-16	9	75	12	0	75	100	46	73
	Finance/ insurance/ securities	0	10	-33	-47	33	54	41	54	82	53	65
	Construction/ civil engineering	11	4	-25	-67	-35	7	59	59	50	75	50
	Transportation/ communication	0	32	-67	-53	37	69	50	50	55	0	67
	Others	18	16	-20	-56	19	17	40	57	53	21	68
	Non-manufacturing sector total	19	35	-39	-47	34	48	48	57	70	23	63
	Total	18	37	-44	-53	55	60	48	43	59	4	59

(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 2010 rose by 49 points to 82 percent from the previous year (33 percent). The percentage of the firms reporting a “more than 20% increase” in their total sales rose by 40 points to 46 percent from the previous year (6 percent). (Table 2-1 and Table 2-2)

Regarding sales forecast for 2011, the firms anticipating an “increase” in their total sales fell by 10 points to 72 percent from the previous period, and the percentage of the firms anticipating a “more than 20% increase” in their total sales also fell by 29 points, from 46 percent in the previous period to 17 percent. (Table 2-1 and Table 2-3).

**(Table 2-1) Change in total sales**

**Unit: percent**

Table 2-17) Change in total sales										Unit, percent	
	Past Surveys									Survey this time	
	Result							Forecast		Forecast	
Year	03	04	05	06	07	08	09	10	11	10	11
Sales Increase	80	82	73	65	61	56	33	84	72	82	72
Sales increase more than 20%	31	44	27	17	14	14	6	43	14	46	17

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

**(Table 2-2) Sales in 2010 (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	13 (68)	2 (11)	9 (47)	2 (11)	4 (21)	0 (0)	4 (21)	0 (0)
	Textile	7 (70)	2 (20)	3 (30)	0 (0)	3 (30)	2 (20)	1 (10)	0 (0)
	Chemical	28 (93)	14 (47)	9 (30)	5 (17)	1 (3)	0 (0)	1 (3)	0 (0)
	Steel/non-ferrous metal	23 (92)	19 (76)	2 (8)	2 (8)	1 (4)	0 (0)	1 (4)	0 (0)
	General machinery	9 (69)	4 (31)	4 (31)	1 (8)	3 (23)	3 (23)	0 (0)	0 (0)
	Electric/electronics machinery	32 (76)	18 (43)	8 (19)	6 (14)	3 (7)	7 (17)	3 (7)	1 (2)
	Transportation machinery	43 (91)	34 (72)	7 (15)	2 (4)	2 (4)	2 (4)	0 (0)	0 (0)
	Others	30 (83)	19 (53)	5 (14)	6 (17)	1 (3)	5 (14)	2 (6)	1 (3)
Manufacturing sector total		185 (83)	112 (50)	39 (18)	34 (15)	11 (5)	26 (12)	12 (5)	11 (5)
Non-manufacture	Trading	40 (89)	24 (53)	10 (22)	6 (13)	4 (9)	1 (2)	0 (0)	0 (0)
	Retailer	10 (91)	2 (18)	2 (18)	6 (55)	0 (0)	1 (9)	1 (9)	0 (0)
	Finance/insurance/securities	15 (94)	6 (38)	3 (19)	6 (38)	1 (6)	0 (0)	0 (0)	0 (0)
	Construction/civil engineering	7 (44)	5 (31)	2 (13)	0 (0)	2 (13)	7 (44)	3 (19)	1 (6)
	Transportation/communication	22 (81)	10 (37)	7 (26)	5 (19)	1 (4)	4 (15)	1 (4)	2 (7)
	Others	11 (61)	6 (33)	2 (11)	3 (17)	5 (28)	2 (11)	1 (6)	0 (0)
	Non-manufacturing sector total	105 (79)	53 (40)	26 (20)	26 (20)	13 (10)	15 (11)	6 (5)	3 (2)
Total		290 (82)	165 (46)	65 (18)	60 (17)	24 (7)	41 (12)	18 (5)	14 (4)

(Table 2-3) Sales forecast 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	14 (74)	3 (16)	4 (21)	7 (37)	3 (16)	2 (11)	2 (11)	0 (0)	0 (0)
	Textile	8 (80)	1 (10)	5 (50)	2 (20)	0 (0)	2 (20)	1 (10)	0 (0)	1 (10)
	Chemical	21 (70)	6 (20)	5 (17)	10 (33)	7 (23)	2 (7)	2 (7)	0 (0)	0 (0)
	Steel/non-ferrous metal	19 (79)	5 (21)	9 (38)	5 (21)	3 (13)	2 (8)	2 (8)	0 (0)	0 (0)
	General machinery	10 (77)	5 (38)	4 (31)	1 (8)	1 (8)	2 (15)	1 (8)	1 (8)	0 (0)
	Electric/electronics machinery	29 (67)	2 (5)	11 (26)	16 (37)	7 (16)	7 (16)	1 (2)	6 (14)	0 (0)
	Transportation machinery	27 (59)	4 (9)	9 (20)	14 (30)	11 (24)	8 (17)	2 (4)	3 (7)	3 (7)
	Others	19 (53)	4 (11)	10 (28)	5 (14)	9 (25)	8 (22)	5 (14)	3 (8)	0 (0)
Manufacturing sector total		147 (67)	30 (14)	57 (26)	60 (27)	41 (19)	33 (15)	16 (7)	13 (6)	4 (2)
Non-manufacture	Trading	34 (79)	11 (26)	13 (30)	10 (23)	6 (14)	3 (7)	3 (7)	0 (0)	0 (0)
	Retailer	9 (82)	1 (9)	5 (45)	3 (27)	2 (18)	0 (0)	0 (0)	0 (0)	0 (0)
	Finance/insurance/securities	15 (94)	1 (6)	8 (50)	6 (38)	1 (6)	0 (0)	0 (0)	0 (0)	0 (0)
	Construction/civil engineering	16 (100)	9 (56)	4 (25)	3 (19)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)
	Transportation/communication	20 (74)	2 (7)	10 (37)	8 (30)	2 (7)	5 (19)	3 (11)	2 (7)	0 (0)
	Others	14 (78)	6 (33)	6 (33)	2 (11)	3 (17)	1 (6)	0 (0)	1 (6)	0 (0)
Non-manufacturing sector total		108 (82)	30 (23)	46 (35)	32 (24)	14 (11)	9 (7)	6 (5)	3 (2)	0 (0)
Total		255 (72)	60 (17)	103 (29)	92 (26)	55 (16)	42 (12)	22 (6)	16 (5)	4 (1)

### 3. NET PROFIT/LOSS

The firms reporting the “profit” in their 2010 before tax profit/loss accounted for 86 percent. The firms reporting an “increase” in their net profit (including the case that their loss will diminish or vanish) accounted for 67 percent, whereas those reporting a “decrease” in their net profit accounted for 18 percent. (Table 3-1)

The percentage of the firms anticipating the “profit” in their 2011 before tax profit/loss accounted for 90 percent. The firms anticipating an “increase” in their net profit accounted for 41 percent, whereas those anticipating a “decrease” in their net profit accounted for 32 percent. (Table 3-2)

(Table 3-1) Result of before Tax Profit/Loss in 2010 (from the previous year)

		Unit: No. of firms and (%)							
Industry		Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease	
Manufacture	Food	12 (63)	1 (5)	6 (32)	19	7 (37)	5 (26)	7 (37)	
	Textile	6 (60)	0 (0)	4 (40)	10	5 (50)	1 (10)	4 (40)	
	Chemical	30 (100)	0 (0)	0 (0)	30	22 (73)	1 (3)	7 (23)	
	Steel/non-ferrous metal	22 (88)	0 (0)	3 (12)	25	22 (88)	0 (0)	3 (12)	
	General machinery	12 (92)	0 (0)	1 (8)	13	7 (54)	3 (23)	3 (23)	
	Electric/electronics machinery	37 (86)	1 (2)	5 (12)	43	24 (56)	12 (28)	7 (16)	
	Transportation machinery	46 (98)	1 (2)	0 (0)	47	42 (89)	3 (6)	2 (4)	
	Others	29 (83)	1 (3)	5 (14)	35	24 (69)	3 (9)	8 (23)	
Manufacturing sector total		194 (87)	4 (2)	24 (11)	222	153 (69)	28 (13)	41 (18)	
Non-manufacture	Trading	41 (91)	1 (2)	3 (7)	45	37 (82)	4 (9)	4 (9)	
	Retailer	10 (91)	0 (0)	1 (9)	11	5 (45)	5 (45)	1 (9)	
	Finance/insurance/securities	15 (94)	0 (0)	1 (6)	16	12 (75)	1 (6)	3 (19)	
	Construction/civil engineering	11 (69)	2 (13)	3 (19)	16	3 (19)	3 (19)	10 (63)	
	Transportation/communication	20 (74)	4 (15)	3 (11)	27	17 (63)	7 (26)	3 (11)	
	Others	14 (82)	2 (12)	1 (6)	17	11 (65)	5 (29)	1 (6)	
Non-manufacturing sector total		111 (84)	9 (7)	12 (9)	132	85 (64)	25 (19)	22 (17)	
Total		305 (86)	13 (4)	36 (10)	354	238 (67)	53 (15)	63 (18)	

(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 2011 (from the previous year)

Unit: No. of firms and (%)

Industry		Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease
Manufacture	Food	13 (68)	2 (11)	4 (21)	19	11 (58)	3 (16)	5 (26)
	Textile	8 (80)	2 (20)	0 (0)	10	8 (80)	0 (0)	2 (20)
	Chemical	28 (93)	2 (7)	0 (0)	30	9 (30)	7 (23)	14 (47)
	Steel/non-ferrous metal	23 (92)	1 (4)	1 (4)	25	13 (52)	5 (20)	7 (28)
	General machinery	11 (85)	0 (0)	2 (15)	13	5 (38)	4 (31)	4 (31)
	Electric/electronics machinery	40 (91)	2 (5)	2 (5)	44	19 (43)	11 (25)	14 (32)
	Transportation machinery	45 (98)	1 (2)	0 (0)	46	11 (24)	14 (30)	21 (46)
	Others	30 (86)	1 (3)	4 (11)	35	10 (29)	9 (26)	16 (46)
Manufacturing sector total		198 (89)	11 (5)	13 (6)	222	86 (39)	53 (24)	83 (37)
Non-manufacture	Trading	41 (91)	3 (7)	1 (2)	45	17 (38)	12 (27)	16 (36)
	Retailer	11 (100)	0 (0)	0 (0)	11	4 (36)	5 (45)	2 (18)
	Finance/insurance/securities	16 (100)	0 (0)	0 (0)	16	11 (69)	5 (31)	0 (0)
	Construction/civil engineering	14 (88)	2 (13)	0 (0)	16	9 (56)	5 (31)	2 (13)
	Transportation/communication	24 (89)	2 (7)	1 (4)	27	11 (41)	10 (37)	6 (22)
	Others	14 (82)	2 (12)	1 (6)	17	7 (41)	7 (41)	3 (18)
Non-manufacturing sector total		120 (91)	9 (7)	3 (2)	132	59 (45)	44 (33)	29 (22)
Total		318 (90)	20 (6)	16 (5)	354	145 (41)	97 (27)	112 (32)

(Note) See table 3-1.



#### 4. CAPITAL INVESTMENT (MANUFACTURING SECTOR)

The amount of planned capital investment (in the manufacturing sector) in 2011 plans to increase by 93.6 percent from 2010. In terms of the number of firms, reporting “increase” (127) is larger than “decrease” (31). (The total number of responding firms is 228.) The planned capital investment was increased in all industries. (Table 4-1)

The predominant reason for capital investment was “replacement of equipment” in both 2010 and 2011, while the percentage of responding “expansion” increased in 2011. (Table 4-2 and Table 4-3)

**(Table 4-1) Actual capital investment in 2010 and planned capital investment in 2011 (manufacturing sector)**  
**Unit: million baht and (%)**

Unit: million baht and (%)

Industry	2010	2011		No. of firms				
	Amount	Amount	Increase %	Increase	No change	Decrease	Undecided	Total
Food	3,490	5,978	71.3	7 (37)	5 (26)	5 (26)	2 (11)	19
Textile	1,186	1,968	65.9	5 (45)	1 (9)	4 (36)	1 (9)	11
Chemical	2,235	3,325	48.8	17 (55)	10 (32)	3 (10)	1 (3)	31
Steel/Non-ferrous metal	1,330	2,928	120.2	15 (56)	6 (22)	4 (15)	2 (7)	27
General machinery	694	7,210	938.9	8 (62)	3 (23)	1 (8)	1 (8)	13
Electric/Electronics machinery	19,866	27,158	36.7	22 (50)	14 (32)	7 (16)	1 (2)	44
Transportation machinery	15,193	51,767	240.7	33 (70)	10 (21)	4 (9)	0 (0)	47
Others	18,627	20,904	12.2	20 (56)	9 (25)	3 (8)	4 (11)	36
Manufacturing sector total	62,620	121,238	93.6	127 (56)	58 (25)	31 (14)	12 (5)	228

(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 2010 (check all that apply)**

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

	Industry	New	Expansion	Replacement	Streamlining	Others	Total	Respond
Manufacture	Food	4 (15)	5 (19)	11 (41)	7 (26)	0 (0)	27	17
	Textile	2 (11)	4 (21)	9 (47)	4 (21)	0 (0)	19	12
	Chemical	10 (24)	8 (19)	20 (48)	4 (10)	0 (0)	42	31
	Steel/Non-ferrous metal	6 (21)	6 (21)	12 (41)	5 (17)	0 (0)	29	23
	General machinery	6 (40)	2 (13)	5 (33)	2 (13)	0 (0)	15	10
	Electric/Electronics machinery	13 (22)	13 (22)	18 (30)	15 (25)	1 (2)	60	41
	Transportation machinery	27 (33)	17 (20)	24 (29)	13 (16)	2 (2)	83	48
	Others	10 (23)	9 (21)	13 (30)	11 (26)	0 (0)	43	29
	Manufacturing sector total	78 (25)	64 (20)	112 (35)	61 (19)	3 (1)	318	211

**(Table 4-3) Details on planned capital investment in 2011 (check all that apply)**

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

	Industry	New	Expansion	Replacement	Streamlining	Others	Total	Respond
Manufacture	Food	5 (17)	6 (21)	10 (34)	8 (28)	0 (0)	29	17
	Textile	1 (5)	5 (26)	9 (47)	4 (21)	0 (0)	19	12
	Chemical	7 (14)	17 (34)	18 (36)	8 (16)	0 (0)	50	30
	Steel/Non-ferrous metal	10 (27)	9 (24)	13 (35)	4 (11)	1 (3)	37	25
	General machinery	9 (45)	4 (20)	5 (25)	2 (10)	0 (0)	20	11
	Electric/Electronics machinery	15 (23)	19 (29)	19 (29)	11 (17)	1 (2)	65	42
	Transportation machinery	30 (33)	24 (26)	20 (22)	17 (18)	1 (1)	92	47
	Others	15 (28)	14 (26)	15 (28)	10 (19)	0 (0)	54	32
	Manufacturing sector total	92 (25)	98 (27)	109 (30)	64 (17)	3 (1)	366	216

## 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 46 percent in the second half of 2011. (Table 5-1, Table 5-2 and Table 5-3)

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

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

Table 3.1) 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	6 (35)	0 (0)	3 (18)	3 (18)	9 (53)	2 (12)	1 (6)	1 (6)	0 (0)	17	
Textile	5 (42)	2 (17)	3 (25)	0 (0)	5 (42)	2 (17)	1 (8)	0 (0)	1 (8)	12	
Chemical	14 (44)	2 (6)	4 (13)	8 (25)	12 (38)	6 (19)	4 (13)	1 (3)	1 (3)	32	
Steel/Non-ferrous metal	8 (36)	2 (9)	3 (14)	3 (14)	11 (50)	3 (14)	0 (0)	3 (14)	0 (0)	22	
General machinery	3 (25)	0 (0)	1 (8)	2 (17)	6 (50)	3 (25)	1 (8)	1 (8)	1 (8)	12	
Electric/Electronics machinery	21 (49)	5 (12)	5 (12)	11 (26)	9 (21)	13 (30)	6 (14)	5 (12)	2 (5)	43	
Transportation machinery	14 (32)	5 (11)	2 (5)	7 (16)	18 (41)	12 (27)	4 (9)	3 (7)	5 (11)	44	
Others	12 (35)	4 (12)	3 (9)	5 (15)	8 (24)	14 (41)	4 (12)	5 (15)	5 (15)	34	
Manufacturing sector total	83 (38)	20 (9)	24 (11)	39 (18)	78 (36)	55 (25)	21 (10)	19 (9)	15 (7)	216	
Trading	10 (26)	1 (3)	4 (11)	5 (13)	23 (61)	5 (13)	3 (8)	2 (5)	0 (0)	38	
Retailer	1 (50)	0 (0)	0 (0)	1 (50)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	2	
Construction	0 (0)	0 (0)	0 (0)	0 (0)	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	2	
Others	2 (33)	0 (0)	2 (33)	0 (0)	3 (50)	1 (17)	1 (17)	0 (0)	0 (0)	6	
Non-manufacturing sector total	13 (27)	1 (2)	6 (13)	6 (13)	29 (60)	6 (13)	4 (8)	2 (4)	0 (0)	48	
Total	96 (36)	21 (8)	30 (11)	45 (17)	107 (41)	61 (23)	25 (9)	21 (8)	15 (6)	264	

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

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

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	11 (65)	0 (0)	4 (24)	7 (41)	4 (24)	2 (12)	2 (12)	0 (0)	0 (0)	17
Textile	7 (58)	1 (8)	3 (25)	3 (25)	3 (25)	2 (17)	1 (8)	1 (8)	0 (0)	12
Chemical	19 (59)	2 (6)	8 (25)	9 (28)	12 (38)	1 (3)	1 (3)	0 (0)	0 (0)	32
Steel/Non-ferrous metal	7 (32)	2 (9)	4 (18)	1 (5)	11 (50)	4 (18)	3 (14)	1 (5)	0 (0)	22
General machinery	4 (33)	0 (0)	4 (33)	0 (0)	6 (50)	2 (17)	1 (8)	1 (8)	0 (0)	12
Electric/Electronics machinery	25 (60)	7 (17)	7 (17)	11 (26)	13 (31)	4 (10)	2 (5)	0 (0)	2 (5)	42
Transportation machinery	19 (44)	6 (14)	9 (21)	4 (9)	19 (44)	5 (12)	2 (5)	0 (0)	3 (7)	43
Others	15 (44)	3 (9)	4 (12)	8 (24)	12 (35)	7 (21)	3 (9)	2 (6)	2 (6)	34
Manufacturing sector total	107 (50)	21 (10)	43 (20)	43 (20)	80 (37)	27 (13)	15 (7)	5 (2)	7 (3)	214
Trading	11 (29)	3 (8)	3 (8)	5 (13)	24 (63)	3 (8)	1 (3)	2 (5)	0 (0)	38
Retailer	1 (50)	0 (0)	0 (0)	1 (50)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	2
Construction	0 (0)	0 (0)	0 (0)	0 (0)	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	2
Others	1 (17)	1 (17)	0 (0)	0 (0)	4 (67)	1 (17)	1 (17)	0 (0)	0 (0)	6
Non-manufacturing sector total	13 (27)	4 (8)	3 (6)	6 (13)	31 (65)	4 (8)	2 (4)	2 (4)	0 (0)	48
Total	120 (46)	25 (10)	46 (18)	49 (19)	111 (42)	31 (12)	17 (6)	7 (3)	7 (3)	262

(Table 5-3) Export in 2011 (the whole year)

Unit: No. of firms and (%)

Table 5.3) Export in 2011 (the whole year)

Unit: No. of firms and (%)

Industry	The whole year 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	10 (59)	0 (0)	4 (24)	6 (35)	4 (24)	3 (18)	2 (12)	1 (6)	0 (0)	17		
Textile	6 (50)	2 (17)	3 (25)	1 (8)	5 (42)	1 (8)	0 (0)	0 (0)	1 (8)	12		
Chemical	14 (44)	1 (3)	5 (16)	8 (25)	12 (38)	6 (19)	6 (19)	0 (0)	0 (0)	32		
Steel/Non-ferrous metal	8 (38)	3 (14)	2 (10)	3 (14)	9 (43)	4 (19)	2 (10)	2 (10)	0 (0)	21		
General machinery	4 (33)	0 (0)	2 (17)	2 (17)	6 (50)	2 (17)	1 (8)	1 (8)	0 (0)	12		
Electric/Electronics machinery	25 (60)	5 (12)	6 (14)	14 (33)	9 (21)	8 (19)	4 (10)	3 (7)	1 (2)	42		
Transportation machinery	19 (44)	5 (12)	7 (16)	7 (16)	18 (42)	6 (14)	2 (5)	0 (0)	4 (9)	43		
Others	15 (44)	3 (9)	4 (12)	8 (24)	8 (24)	11 (32)	4 (12)	5 (15)	2 (6)	34		
Manufacturing sector total	101 (47)	19 (9)	33 (15)	49 (23)	71 (33)	41 (19)	21 (10)	12 (6)	8 (4)	213		
Trading	11 (29)	2 (5)	3 (8)	6 (16)	24 (63)	3 (8)	1 (3)	2 (5)	0 (0)	38		
Retailer	1 (50)	0 (0)	0 (0)	1 (50)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	2		
Construction	0 (0)	0 (0)	0 (0)	0 (0)	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	2		
Others	2 (33)	1 (17)	1 (17)	0 (0)	4 (67)	0 (0)	0 (0)	0 (0)	0 (0)	6		
Non-manufacturing sector total	14 (29)	3 (6)	4 (8)	7 (15)	31 (65)	3 (6)	1 (2)	2 (4)	0 (0)	48		
Total	115 (44)	22 (8)	37 (14)	56 (21)	102 (39)	44 (17)	22 (8)	14 (5)	8 (3)	261		

## 6. PROSPECTIVE MARKET IN THE FUTURE

For the prospective market in the future (check all that apply), the predominant response was “India” (46 percent) same as the previous survey, followed by “Indonesia” (45 percent), “Vietnam” (32 percent) and “China” (18 percent). (Table 6)

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

Unit: No. of firms

Industry		India	Indonesia	Vietnam	China	Japan	Europe	Malaysia	CLM	Middle East	USA	Latin America	Philippines	Oceania	Singapore	Others	Total	No. of firms
Manufacture	Food	3 (18)	1 (6)	2 (12)	2 (12)	4 (24)	7 (41)	2 (12)	2 (12)	3 (18)	4 (24)	1 (6)	0 (0)	3 (18)	2 (12)	1 (6)	35	17
	Textile	5 (42)	2 (17)	4 (33)	5 (42)	6 (50)	4 (33)	1 (8)	3 (25)	2 (17)	3 (25)	0 (0)	1 (8)	0 (0)	1 (8)	2 (17)	38	12
	Chemical	17 (55)	16 (52)	10 (32)	3 (10)	1 (3)	4 (13)	3 (10)	3 (10)	1 (3)	4 (13)	2 (6)	2 (6)	5 (16)	1 (3)	2 (6)	73	31
	Steel/ non-ferrous metal	14 (58)	8 (33)	7 (29)	2 (8)	1 (4)	4 (17)	3 (13)	1 (4)	3 (13)	2 (8)	1 (4)	0 (0)	2 (8)	1 (4)	4 (17)	52	24
	General machinery	8 (67)	5 (42)	6 (50)	0 (0)	1 (8)	1 (8)	1 (8)	2 (17)	1 (8)	0 (0)	1 (8)	0 (0)	0 (0)	0 (0)	0 (0)	26	12
	Electric/ electronics machinery	19 (49)	15 (38)	11 (28)	14 (36)	8 (21)	7 (18)	7 (18)	5 (13)	6 (15)	3 (8)	5 (13)	3 (8)	2 (5)	1 (3)	2 (5)	107	39
	Transportation machinery	15 (37)	29 (71)	9 (22)	5 (12)	10 (24)	2 (5)	3 (7)	1 (2)	3 (7)	2 (5)	5 (12)	2 (5)	1 (2)	0 (0)	2 (5)	89	41
	Others	13 (13)	13 (43)	10 (33)	4 (13)	7 (23)	4 (13)	8 (27)	3 (10)	5 (17)	3 (10)	1 (3)	3 (10)	2 (7)	2 (7)	1 (3)	77	30
Manufacturing sector total		114 (46)	89 (43)	59 (29)	35 (17)	38 (18)	33 (16)	28 (14)	20 (10)	24 (12)	21 (10)	16 (8)	11 (5)	15 (7)	8 (4)	14 (7)	497	206
Non-manufacture	Trading	18 (50)	18 (50)	18 (50)	10 (28)	6 (17)	1 (3)	4 (11)	4 (11)	2 (6)	0 (0)	0 (0)	4 (11)	0 (0)	3 (8)	0 (0)	85	36
	Retailer	0 (0)	1 (100)	0 (0)	0 (0)	0 (0)	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2	1
	Construction	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1	1
	Others	2 (33)	4 (67)	3 (50)	0 (0)	0 (0)	0 (0)	1 (17)	3 (50)	2 (33)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	15	6
Non-manufacturing sector total		20 (45)	23 (52)	21 (48)	10 (23)	6 (14)	2 (5)	5 (11)	8 (18)	4 (9)	0 (0)	0 (0)	4 (9)	0 (0)	3 (7)	0 (0)	103	44
Total		114 (46)	112 (45)	80 (32)	45 (18)	44 (18)	35 (14)	33 (13)	28 (11)	28 (11)	21 (8)	16 (6)	15 (6)	15 (6)	11 (4)	14 (6)	600	250
This time		1	2	3	4	5	6	7	8	8	10	11	12	12	14	-		
Previous time		1	2	3	4	5	8	6	9	7	10	11	14	12	12	-		

(Note) 1. Europe includes Russia.

2. CLM stands for Cambodia, Laos, and Myanmar.

## 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” (54.2 percent), followed by “not less than 30.5 but less than 31.0” (8.9 percent) and “not less than 31.0 but less than 31.5” (7.9 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 (%)

	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	1	0	0	0	1	0	0	2	0	0	0	0	2 (0.9)
Not less than 28.5 but less than 29.0	0	1	0	0	0	0	0	0	1	1	0	0	1	2 (0.9)
Not less than 29.0 but less than 29.5	0	4	3	0	0	1	3	3	14	1	0	0	1	15 (7.0)
Not less than 29.5 but less than 30.0	3	1	1	1	0	1	5	1	13	3	0	0	3	16 (7.5)
Not less than 30.0 but less than 30.5	8	3	15	11	4	29	13	12	95	18	0	3	21	116 (54.2)
Not less than 30.5 but less than 31.0	1	1	3	3	1	1	3	2	15	1	2	1	4	19 (8.9)
Not less than 31.0 but less than 31.5	1	1	0	2	0	0	2	6	12	5	0	0	5	17 (7.9)
Not less than 31.5 but less than 32.0	0	0	0	1	1	2	0	0	4	0	0	1	1	5 (2.3)
Not less than 32.0 but less than 32.5	1	0	1	1	0	0	0	3	6	2	0	0	2	8 (3.7)
Not less than 32.5 but less than 33.0	0	0	0	0	0	0	1	2	3	1	0	0	1	4 (1.9)
Not less than 33.0 but less than 33.5	0	0	1	0	1	0	1	1	4	2	0	0	2	6 (2.8)
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	0	0	0	0	0 (0.0)
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	1	1	0	0	2	0	4	0	0	0	0	4 (1.9)
No. of firms	14	12	25	20	7	35	30	30	173	34	2	5	41	214

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	39.00	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 2.7 but less than 2.8” (55.1 percent), followed by “not less than 2.8 but less than 2.9” (24.4 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 2.5 but less than 2.6	0	2	0	1	1	3	1	1	9	2	0	0	2	11 (4.9)
Not less than 2.6 but less than 2.7	0	0	1	1	2	3	3	4	14	5	1	1	7	21 (9.3)
Not less than 2.7 but less than 2.8	6	1	16	8	3	17	32	18	101	18	1	4	23	124 (55.1)
Not less than 2.8 but less than 2.9	5	0	6	8	4	9	2	10	44	9	0	2	11	55 (24.4)
Not less than 2.9 but less than 3.0	0	3	0	0	0	1	0	1	5	0	0	0	0	5 (2.2)
Not less than 3.0 but less than 3.1	2	0	2	0	0	0	2	1	7	0	0	0	0	7 (3.1)
Not less than 3.1 but less than 3.2	0	0	0	0	0	0	0	1	1	0	0	0	0	1 (0.4)
Not less than 3.2 but less than 3.3	0	0	0	0	0	1	0	0	1	0	0	0	0	1 (0.4)
No. of firms	13	6	25	18	10	34	40	36	182	34	2	7	43	225

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	2.80	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 2010 (simple average of respondents) was 48.8 percent for ASEAN, including 43.2 percent for Thailand. (Table 8-1)

Regarding the ratio of planned procurement destination in 2011, the percentage of ASEAN rose, whereas the percentages of Japan fell, compared to those of 2010. (Table 8-2)

**(Table 8-1) Suppliers of parts and materials in 2010**

**Unit: (%)**

Industry		ASEAN			Japan	China	Others	Total	No. of firms
			Thailand	ASEAN (except Thailand)					
Manufacturing sector	Food	82.1	79.1	3.0	4.1	2.8	10.9	100.0	18
	Textile	57.1	42.2	14.9	12.7	8.4	21.8	100.0	12
	Chemical	47.6	42.5	5.0	40.3	2.7	9.5	100.0	28
	Steel/Non-ferrous metal	52.2	42.8	9.4	38.1	3.3	6.4	100.0	24
	General machinery	44.3	42.4	1.8	50.2	5.3	0.3	100.0	12
	Electric/Electronics machinery	53.4	43.1	10.3	34.8	9.3	2.4	100.0	42
	Transportation machinery	62.2	56.0	6.2	34.9	1.5	1.3	100.0	45
	Others	48.6	43.4	5.2	38.6	2.6	10.2	100.0	32
	Manufacturing average	55.9	49.0	7.0	31.7	4.5	7.9	100.0	213
Non-manufacture	Trading	48.1	37.4	10.6	41.9	2.9	7.1	100.0	34
	Retailer	13.3	13.3	0.0	63.3	23.3	0.0	100.0	3
	Construction	55.0	55.0	0.0	40.0	0.0	5.0	100.0	2
	Others	50.0	44.0	6.0	42.0	6.0	2.0	100.0	5
	Non-manufacturing average	41.6	37.4	4.2	46.8	8.0	3.5	100.0	44
Total		48.8	43.2	5.6	39.3	6.3	5.7	100.0	257

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

**(Table 8-2) Planned suppliers of parts and materials in 2011**

**Unit: (%)**

Industry		ASEAN			Japan	China	Others	Total	No. of firms
			Thailand	ASEAN (except Thailand)					
Manufacturing sector	Food	82.5	79.7	2.8	3.7	2.9	10.9	100.0	18
	Textile	61.6	44.2	17.4	9.3	8.1	21.0	100.0	12
	Chemical	50.3	44.2	6.0	38.1	2.9	8.7	100.0	28
	Steel/Non-ferrous metal	53.2	44.2	9.0	36.7	3.3	6.8	100.0	24
	General machinery	45.3	43.6	1.7	48.3	6.2	0.3	100.0	12
	Electric/Electronics machinery	53.5	45.4	8.1	35.3	9.1	2.1	100.0	42
	Transportation machinery	64.4	58.0	6.4	32.6	1.6	1.4	100.0	45
	Others	50.3	44.7	5.6	37.3	2.6	9.8	100.0	32
	Manufacturing average	57.6	50.5	7.1	30.2	4.6	7.6	100.0	213
Non-manufacture	Trading	49.7	38.2	11.5	39.8	3.2	7.4	100.0	34
	Retailer	13.3	13.3	0.0	63.3	23.3	0.0	100.0	3
	Construction	55.0	55.0	0.0	40.0	0.0	5.0	100.0	2
	Others	52.8	44.4	8.4	39.2	6.0	2.0	100.0	5
	Non-manufacturing average	42.7	37.7	5.0	45.6	8.1	3.6	100.0	44
Total		50.2	44.1	6.0	37.9	6.4	5.6	100.0	257

(Note) See Table 8-1.

## 9. PROBLEMS WITH CORPORATE MANAGEMENT

Regarding problems with corporate management (check all that apply), the predominant response was “excessive competition with competitors (1<sup>st</sup> rank in the previous survey)” (61 percent), followed by “decreased selling price (price war)” and “hike in material prices.” (Table 9)

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

Unit: No. of firms and (%)

Cont. 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	Excessive competition with competitors	10(53)	4(33)	25(48)	6(57)	10(71)	29(64)	33(70)	20(59)	137(60)	25(54)	9 (82)	14(82)	12(75)	16(59)	11(61)	87(64)	224(61)
2	2	Decreased selling price (price war)	10(53)	4(33)	33(42)	6(57)	11(79)	24(53)	29(62)	21(62)	128(56)	12(26)	3 (27)	7 (41)	9 (56)	15(59)	3 (17)	49(36)	177(48.49)
4	3	Hike in material prices	26(84)	7(58)	26(84)	3(46)	6 (43)	31(69)	25(53)	19(56)	143(62)	15(33)	3 (27)	0 (0)	7 (44)	5 (19)	2 (11)	32(24)	175(47.95)
3	4	Lack of human resources of manager-level	5 (26)	6(50)	33(42)	6(57)	7 (50)	25(53)	25(53)	16(47)	103(45)	19(41)	4 (36)	8 (47)	8 (50)	15(56)	10(56)	64(47)	167(46)
6	5	Lack of human resources of workers/ staffs-level	3(68)	7(58)	7 (23)	10(36)	3 (21)	44(31)	16(34)	16(47)	86(37)	12(26)	6 (55)	3 (18)	9 (56)	11(41)	6 (33)	47(35)	133(36)
7	6	Increased in total labor cost	5 (26)	5(42)	9 (29)	9 (32)	3 (21)	17(38)	17(36)	12(35)	77(33)	10(22)	3 (27)	4 (24)	10(63)	11(41)	2 (11)	40(30)	117(32)
5	7	Foreign exchange fluctuation	4 (21)	6(50)	3 (10)	4 (14)	3 (21)	16(36)	11(23)	11(32)	58(25)	16(35)	1 (9)	1 (6)	1 (6)	3 (11)	2 (11)	24(18)	82(22)
9	8	Job hopping of employee	5 (26)	1 (8)	6 (19)	4 (14)	2 (14)	4 (9)	8 (17)	6 (18)	36(16)	11(24)	2 (18)	2 (12)	3 (19)	9 (33)	3 (17)	30(22)	66(18)
8	9	Quality management	2 (11)	4(33)	3 (10)	6 (21)	4 (29)	8 (18)	8 (17)	5 (15)	40(17)	3 (7)	0 (0)	0 (0)	1 (6)	5 (19)	1 (6)	10 (7)	50(14)
10	10	Changes in products/ users' needs	1 (5)	0 (0)	0 (0)	0 (0)	1 (7)	7 (16)	3 (6)	1 (3)	13(6)	5 (11)	2 (18)	3 (18)	2 (13)	5 (19)	2 (11)	19(14)	32 (9)
11	11	Difficulty in collecting money from customers	1 (5)	0 (0)	1 (3)	0 (0)	1 (7)	2 (4)	0 (0)	1 (3)	6 (3)	1 (2)	0 (0)	2 (12)	5 (31)	0 (0)	0 (0)	8 (6)	14 (4)
12	12	Excessive employment	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (2)	3 (6)	1 (3)	5 (2)	2 (4)	0 (0)	1 (6)	1 (6)	1 (4)	0 (0)	5 (4)	10 (3)
13	13	Difficulty in obtaining financial support	0 (0)	0 (0)	0 (0)	1 (4)	0 (0)	1 (2)	1 (2)	1 (3)	4 (2)	0 (0)	1 (9)	0 (0)	0 (0)	1 (4)	0 (0)	2 (1)	6 (2)
14	14	Excessive capital investment	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (9)	0 (0)	0 (0)	1 (4)	0 (0)	2 (1)	2 (1)
15	14	Infringement of intellectual property rights	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (4)	0 (0)	1 (1)	2 (1)
-	-	Others	1 (5)	0 (0)	3 (10)	0 (0)	0 (0)	1 (2)	2 (4)	1 (3)	8 (3)	2 (4)	0 (0)	1 (6)	2 (13)	0 (0)	0 (0)	5 (4)	13 (4)
Total			73	44	100	95	51	170	181	131	845	133	35	46	70	99	42	425	1,270
No. of firms			19	13	31	28	14	45	47	34	230	46	11	17	16	27	18	135	365(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” (64 percent), followed by “development and implementation of customs-related system” (48 percent), “improvement of education/ human resource development” (28 percent) and “relaxation of the Foreign Business Act” (28 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	10(53)	6(55)	8(56)	20(69)	5(38)	26(59)	26(57)	22(67)	33(59)	31(69)	10(91)	13(72)	12(75)	19(73)	12(67)	97(72)	230(64)
2	2	Development and implementation of customs-related system	10(53)	4(36)	20(63)	16(55)	5(46)	25(57)	30(65)	15(45)	26(56)	28(62)	3(27)	0(0)	2(13)	11(42)	4(22)	48(36)	174(48)
4	3	Improvement of education/ human resource development	6(32)	5(45)	10(31)	6(21)	2(15)	16(36)	12(26)	2(36)	19(30)	11(24)	3(27)	4(22)	1(6)	8(31)	4(22)	31(23)	100(28)
5	3	Relaxation of the Foreign Business Act	4(21)	2(18)	7(22)	7(24)	1(8)	4(9)	4(9)	7(21)	16(16)	21(47)	2(18)	11(61)	8(50)	12(46)	10(56)	64(48)	100(28)
3	5	Implementation of tax-related system	4(21)	3(27)	11(34)	3(10)	3(23)	17(39)	10(22)	10(30)	11(27)	10(22)	4(36)	5(28)	8(50)	3(12)	5(28)	35(26)	96(27)
5	6	Work permit/ visa-related issues	3(16)	5(45)	3(9)	7(24)	1(8)	6(14)	3(7)	2(6)	10(13)	21(47)	0(0)	4(22)	9(56)	6(23)	7(39)	47(35)	77(21)
8	7	Infrastructure development in Bangkok metropolis area	1(5)	1(9)	6(19)	5(17)	2(15)	7(16)	9(20)	8(24)	19(17)	14(31)	1(9)	6(33)	3(19)	9(35)	3(17)	36(27)	75(21)
7	8	Prevention of labor disputes	2(11)	1(9)	10(31)	7(24)	3(23)	18(41)	18(39)	8(24)	17(30)	2(4)	0(0)	0(0)	0(0)	4(15)	1(6)	7(5)	74(20)
9	9	Broad-based infrastructure development linking Thailand with neighboring countries	3(16)	2(18)	2(6)	3(10)	2(15)	4(9)	1(2)	4(12)	21(9)	5(11)	1(9)	2(11)	0(0)	6(23)	1(6)	15(11)	36(10)
11	10	Promotion of regional operating headquarters function (e.g. ROH, IPC)	2(11)	1(9)	0(0)	1(3)	2(15)	3(7)	4(9)	1(3)	14(6)	2(4)	0(0)	3(17)	0(0)	4(15)	1(6)	10(7)	24(7)
10	11	Measures to prevent expansion of new-type or flu influenza	0(0)	0(0)	1(3)	2(7)	0(0)	5(11)	1(2)	1(3)	10(4)	4(9)	0(0)	1(6)	1(6)	3(12)	0(0)	9(7)	19(5)
-	-	Others	1(5)	1(9)	2(6)	1(3)	0(0)	1(2)	2(4)	1(3)	9(4)	2(4)	0(0)	0(0)	2(13)	2(8)	0(0)	6(4)	15(4)
Total			46	31	90	78	27	132	120	91	615	151	24	49	46	87	48	405	1020
No. of firms			19	11	32	29	13	44	46	33	227	45	11	18	16	26	18	134	361(100)

## 11. IMPACT OF THE GREAT EAST JAPAN EARTHQUAKE

### (1) Impacts of the Great East Japan Earthquake on business performance

With reference to the impacts of the Great East Japan Earthquake on business performance, the predominant response was “with impacts” (63 percent). The percentage of firms responding “no impact so far but may have in future” was 14 percent.

The percentage of firms reported “with impacts” was high especially in transportation machinery (94 percent), transportation/communication (78 percent), general machinery (71 percent), trading (69 percent), and electric/electronics machinery (68 percent). (Table 11-1)

(Table 11-1) Impacts of the Great East Japan Earthquake

Unit: No. of firms and (%)

Ent. No. of firms and (%)

Industry		With impacts		No impact so far but may have in future		No impact		No. of firms
Manufacture	Food	9	(47)	6	(32)	4	(21)	19
	Textile	6	(55)	3	(27)	2	(18)	11
	Chemical	22	(69)	4	(13)	6	(19)	32
	Steel/non-ferrous metal	17	(59)	1	(3)	11	(38)	29
	General machinery	10	(71)	3	(21)	1	(7)	14
	Electric/electronics machinery	30	(68)	5	(11)	9	(20)	44
	Transportation machinery	44	(94)	1	(2)	2	(4)	47
	Others	23	(66)	4	(11)	8	(23)	35
	Manufacturing sector total	161	(70)	27	(12)	43	(19)	231
Non-manufacture	Trading	31	(69)	5	(11)	9	(20)	45
	Retailer	4	(36)	2	(18)	5	(45)	11
	Finance/insurance/securities	4	(22)	6	(33)	8	(44)	18
	Construction/civil engineering	1	(6)	5	(31)	10	(63)	16
	Transportation/communication	21	(78)	2	(7)	4	(15)	27
	Others	9	(47)	3	(16)	7	(37)	19
	Non-manufacturing sector total	70	(51)	23	(17)	43	(32)	136
Total		231	(63)	50	(14)	86	(23)	367

**(2) Factors of impacts by the Great East Japan Earthquake on business performance**

As for the factors of impacts by the Great East Japan Earthquake on business performance (check all that apply), the predominant response was “difficulty in importing raw materials/parts from Japan due to suppliers affected” (21 percent), followed by “difficulty in importing raw materials/parts due to suppliers whose suppliers were affected” (19 percent). (Table 11-2)

**(Table 11-2) Factors of impacts by the Great East Japan Earthquake on business performance (check all that apply)**

	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	
Difficulty in importing raw materials/parts from Japan due to suppliers affected	2	0	15	4	5	19	16	13	74	17	1	1	1	3	0	23	97 (21)
Difficulty in importing raw materials/parts due to suppliers whose suppliers were affected	2	3	6	2	5	17	17	9	61	16	1	2	4	2	2	27	88 (19)
Decrease in production/sales due to production reduction in customers in Japan	1	5	8	2	1	8	14	11	50	7	0	0	0	3	0	10	60 (13)
Direct damages due to the head office, factory or sales office affected	1	1	3	2	2	6	5	2	22	5	0	0	1	3	1	10	32 (7)
Decrease in production/sales due to customers affected	1	2	2	1	1	3	7	2	19	8	0	0	0	1	0	9	28 (6)
Decrease in production/sales due to rolling outages in Japan	1	0	3	1	1	2	6	2	16	8	0	0	0	3	1	12	28 (6)
Delay in import procedures due to radioactive contamination screening	9	0	0	0	0	1	0	0	10	4	3	0	0	4	2	13	23 (5)
Reluctant buying by harmful rumour	4	0	0	0	0	1	0	1	6	1	2	0	0	4	3	10	16 (3)
Difficulty in importing raw materials/parts from Japan due to damaged ports or logistics network in Japan	0	0	0	0	2	2	0	1	5	1	0	1	0	2	0	4	9 (2)
Increase in production by alternative production at related entities within Japan	2	0	1	0	0	1	2	1	7	2	0	0	0	0	0	2	9 (2)
Extended additional investment in Thai subsidiaries	0	0	1	0	2	0	1	1	5	1	0	0	2	1	0	4	9 (2)
Increased production to compensate underproduction in Japan due to increasing demands	1	0	2	0	0	2	0	0	5	1	0	0	0	0	1	2	7 (2)
Shortage of cash flow	0	0	0	0	0	0	3	1	4	0	0	0	0	0	0	0	4 (1)
Decrease in production/sales due to damaged ports or logistics network in Japan	0	0	0	0	0	1	1	0	2	0	0	0	0	0	0	0	2 (0)
Difficulty in obtaining financial support	0	0	0	0	0	0	1	0	1	0	0	0	0	0	0	0	1 (0)
Others	1	1	5	9	0	4	8	3	31	5	1	6	1	6	1	20	51 (11)
Total	25	12	46	21	19	67	81	47	318	76	8	10	9	32	11	146	464 (100)

### (3) Measures against the Great East Japan Earthquake

As for the measures against the Great East Japan Earthquake (check all that apply), the predominant response was “no measure taken so far” (45 percent), followed by “procurement of raw materials/parts from other suppliers” (25 percent) and “production/business adjustment (e.g. temporary suspension of operation/business, reduced production)” (11 percent). (Table 11-3)

(Table 11-3) Measures against the Great East Japan Earthquake (check all that apply)

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	
No measure taken so far	10	4	5	8	5	11	10	9	62	26	4	10	5	20	20	85	147 (45)
Procurement of raw materials/parts from other suppliers	4	1	11	2	5	20	13	13	69	6	1	0	3	0	2	12	81 (25)
Production/business adjustment (e.g. temporary suspension of operation/business, reduced production)	0	3	7	5	2	5	11	2	35	2	0	0	0	0	0	2	37 (11)
Training of excessive employees due to reduced production etc.	0	0	3	2	1	1	14	4	25	0	0	0	0	1	0	1	26 (8)
Layoff of excessive employees due to reduction production etc.	0	0	2	1	0	0	4	2	9	0	0	0	0	0	0	0	9 (3)
Transfer of production line in Japan to Thailand	0	0	1	0	0	0	3	0	4	0	0	0	0	0	0	0	4 (1)
Dismissal/personnel cutbacks	0	0	0	0	0	1	1	0	2	0	0	0	0	0	0	0	2 (1)
Others	2	1	1	3	0	2	2	2	13	2	1	3	0	1	3	10	23 (7)
Total	16	9	30	21	13	40	58	32	219	36	6	13	8	22	25	110	329 (100)

#### (4) Change in operating ratio due to the Great East Japan Earthquake

As for the change in operating ratio due to the Great East Japan Earthquake, the predominant response was “no change” (62 percent), followed by “decrease” (34 percent).

More than 50% of the firms reported “decrease” in transportation machinery (70 percent), chemical (50 percent) and steel/non-ferrous metal (50 percent). (Table 11-4)

**(Table 11-4) Change in operating ratio due to the Great East Japan Earthquake**

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

Industry		Increase		No change		Decrease		No. of firms
Manufacture	Food	4	(21)	14	(74)	1	(5)	19
	Textile	0	(0)	7	(70)	3	(30)	10
	Chemical	1	(3)	14	(47)	15	(50)	30
	Steel/non-ferrous metal	2	(8)	11	(42)	13	(50)	26
	General machinery	1	(7)	9	(64)	4	(29)	14
	Electric/electronics machinery	3	(7)	25	(60)	14	(33)	42
	Transportation machinery	1	(2)	13	(28)	32	(70)	46
	Others	1	(3)	18	(58)	12	(39)	31
	Manufacturing sector total	13	(6)	111	(51)	94	(43)	218
Non-manufacture	Trading	1	(3)	29	(74)	9	(23)	39
	Retailer	0	(0)	9	(100)	0	(0)	9
	Finance/insurance/securities	0	(0)	12	(100)	0	(0)	12
	Construction/civil engineering	0	(0)	12	(100)	0	(0)	12
	Transportation/communication	1	(4)	16	(64)	8	(32)	25
	Others	0	(0)	15	(94)	1	(6)	16
	Non-manufacturing sector total	2	(2)	93	(82)	18	(16)	113
Total		15	(5)	204	(62)	112	(34)	331

# **(5) Decrease in operating ratio due to the Great East Japan Earthquake**

As for the decrease in operating ratio due to the Great East Japan Earthquake, the predominant response was “less than 20% decrease” (43 percent), followed by “not less than 20% but less than 30% decrease” (18 percent).

There are the firms reporting not less than 50% decrease in several industries including transportation machinery, chemical and steel/non-ferrous metal. (Table 11-5)

**(Table 11-5) Decrease in operating ratio due to the Great East Japan Earthquake**

	Unit: No. of firms and (%)															
	Manufacture									Non-manufacture						
	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
Less than 20% decrease	1	4	5	5	3	11	8	5	42	6	0	0	0	1	0	7
Not less than 20% but less than 30% decrease	0	0	3	4	0	2	4	2	15	3	0	0	0	2	0	5
Not less than 30% but less than 40% decrease	0	0	2	1	1	0	2	1	7	0	0	0	0	1	0	1
Not less than 40% but less than 50% decrease	0	0	1	1	0	0	6	1	9	0	0	0	0	0	0	0
Not less than 50% but less than 60% decrease	0	0	2	0	1	1	5	3	12	1	0	0	0	1	0	2
Not less than 60% but less than 70% decrease	0	0	2	0	0	0	5	1	8	0	0	0	0	1	0	1
Not less than 70% but less than 80% decrease	0	0	0	2	0	0	1	0	3	0	0	0	0	0	1	1
Not less than 80% decrease	0	0	0	0	0	0	1	0	1	0	0	0	0	0	0	0
Total	1	4	15	13	5	14	32	13	97	10	0	0	0	6	1	17
																114 (100)

# **(6) Expected recovery in production**

As for the expected recovery in production, the predominant response was “August or September” (35 percent), followed by “July” (27 percent) and “June” (15 percent). Most of the firms expected recovery within 2011. (Table 11-6)

**(Table 11-6) Expected recovery in production**

	Unit: No. of firms and (%)																
	Manufacture									Non-manufacture							
	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	Grand total
Already recovered to the normal level	0	0	0	1	0	0	6	0	7	0	0	0	0	1	0	1	8 (7)
June	0	0	3	1	0	1	7	3	15	1	0	0	0	1	0	2	17 (15)
July	0	1	4	4	3	6	9	3	30	1	0	0	0	1	0	2	32 (27)
August or September	1	2	5	6	1	4	11	3	33	5	0	0	0	3	0	8	41 (35)
October or November	0	0	3	1	0	3	1	1	9	3	0	0	0	1	0	4	13 (11)
At least next year	0	1	0	0	0	0	0	1	2	0	0	0	0	1	1	2	4 (3)
Unknown	0	0	0	0	0	0	0	2	2	0	0	0	0	0	0	0	2 (2)
Total	1	4	15	13	4	14	34	13	98	10	0	0	0	8	1	19	117 (100)

### (7) Procurement of alternatives

As for the procurement of alternatives, the predominant response was “already started” (53 percent), followed by “going to start” (33 percent). (Table 11-7)

(Table 11-7) Procurement of alternatives

Unit: No. of firms and (%)						
Industry		Already started		Going to start		No. of firms
Manufacture	Food	1	(20)	3	(60)	5
	Textile	0	(0)	1	(100)	1
	Chemical	8	(73)	2	(18)	11
	Steel/non-ferrous metal	1	(50)	1	(50)	2
	General machinery	3	(60)	2	(40)	5
	Electric/electronics machinery	13	(65)	5	(25)	20
	Transportation machinery	11	(73)	4	(27)	15
	Others	5	(36)	5	(36)	14
	Manufacturing sector total	42	(58)	23	(32)	73
Non-manufacture	Trading	3	(43)	3	(43)	7
	Retailer	1	(100)	0	(0)	1
	Finance/insurance/securities	0	(0)	0	(0)	0
	Construction/civil engineering	0	(0)	2	(50)	4
	Transportation/communication	1	(100)	0	(0)	1
	Others	0	(0)	1	(33)	3
	Non-manufacturing sector total	5	(31)	6	(38)	16
Total		47	(53)	29	(33)	89



# **(8) Alternative procurement destination**

As for the alternative procurement destination, the predominant response was “Japan” (40 percent), followed by “Thailand” (25 percent) and “China” (12 percent). (Table 11-8)

**(Table 11-8) Alternative procurement destination**

	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
Japan	1	0	4	1	4	11	11	5	37	3	1	0	1	0	0	5	42 (40)
Thailand	2	1	5	0	1	7	3	2	21	4	0	0	0	0	1	5	26 (25)
China	0	0	3	0	0	4	2	1	10	1	0	0	0	1	1	3	13 (12)
ASEAN (except Thailand)	0	0	0	0	0	0	2	2	4	2	0	0	1	0	2	5	9 (8)
Others	1	0	1	1	0	0	3	1	7	1	0	0	0	0	1	2	9 (8)
Taiwan	0	0	3	1	0	0	1	0	5	0	0	0	0	0	0	0	5 (5)
South Korea	0	0	1	0	0	1	0	0	2	0	0	0	0	0	0	0	2 (2)
Total	4	1	17	3	5	23	22	11	86	11	1	0	2	1	5	20	106 (100)

**(9) Measures to be taken in light with the Great East Japan Earthquake**

As for the measures to be taken in light with the Great East Japan Earthquake (check all that apply), the predominant response was “acceleration of local procurement” (25 percent), followed by “diversification of suppliers” (22 percent) and “research/identification of alternatives” (20 percent). The predominant response in the non-manufacture sector was “multilateralization of business and customers.” (Table 11-9)

**(Table 11-9) Measures to be taken in light with the Great East Japan Earthquake (check all that apply)**

	Manufacture									Non-manufacture							Unit: No. of firms and (%)	
	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	Grand total	
Acceleration of local procurement	7	2	10	4	6	25	25	14	93	7	1	0	4	1	1	14	107 (25)	
Diversification of suppliers	3	4	12	10	3	19	13	13	77	5	4	0	2	3	4	18	95 (22)	
Research/identification of alternatives	5	2	14	6	3	13	10	17	70	8	0	1	2	2	3	16	86 (20)	
Multilateralization of business and customers	1	5	4	6	2	4	7	2	31	9	0	1	1	9	7	27	58 (14)	
Request for risk diversification to suppliers	2	0	2	1	0	6	11	5	27	3	0	2	0	2	1	8	35 (8)	
Increase in stock	3	0	5	2	2	4	0	3	19	7	1	0	0	0	0	8	27 (6)	
Shortening of consideration period for alternatives	0	1	2	1	1	2	3	2	12	0	0	0	0	0	0	0	12 (3)	
Others	0	0	0	2	0	0	2	0	4	1	0	1	0	1	0	3	7 (2)	
Total	21	14	49	32	17	73	71	56	333	40	6	5	9	18	16	94	427 (100)	

**(10) Requests to the Thai government related to the Great East Japan Earthquake**

Regarding the requests to the Thai government related to the Great East Japan Earthquake (check all that apply), the predominant response was “avoidance of delay in/facilitation of customs procedures” (40 percent), followed by “postponement of minimum wage increase” (37 percent) and “prevention of damages by harmful rumor” (30 percent). (Table 11-10)

**(Table 11-10) Requests to the Thai government related to the Great East Japan Earthquake (check all that apply)**

Unit: 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	Avoidance of delay in/facilitation of customs procedures	12(67)	5 (63)	12(44)	6 (32)	5 (42)	11(30)	15(37)	13(42)	79(41)	22(61)	3 (30)	0 (0)	2 (15)	10(50)	1 (8)	38(38)	117(40)
2	Postponement of minimum wage increase	3(17)	3 (38)	12(44)	7 (37)	0 (0)	20(54)	22(54)	17(55)	84(44)	8 (22)	4 (40)	1 (10)	4 (31)	4 (20)	3 (25)	24(24)	108(37)
3	Prevention of damages by harmful rumor	7(39)	3 (38)	6 (22)	2 (11)	2 (17)	8 (22)	12(29)	9 (29)	49(25)	10(28)	4 (40)	7 (70)	6 (46)	11(55)	2 (17)	40(40)	89(30)
4	Facilitation of tax/customs system (e.g. early refund of VAT and customs duty, special benefits for Japanese enterprises)	2(11)	3 (38)	10(37)	4 (21)	3 (25)	15(41)	8 (20)	10(32)	55(28)	14(39)	0 (0)	2 (20)	4 (31)	6 (30)	2 (17)	28(28)	83(28)
5	Relaxation of requirements for short-term visa for business trippers and work permit for Japanese expatriates	2(11)	2 (25)	4 (15)	4 (21)	2 (17)	5 (14)	5 (12)	8 (26)	32(17)	11(31)	0 (0)	3 (30)	5 (38)	5 (25)	8 (67)	32(32)	64(22)
6	Relaxation of requirements for radioactive substance certificate and certificate of origin	13(72)	2 (25)	4 (15)	0 (0)	3 (25)	3 (8)	6 (15)	3 (10)	34(18)	10(28)	3 (30)	0 (0)	0 (0)	8 (40)	1 (8)	22(22)	56(19)
7	Maintenance of logistics route to/from Japan	1(6)	2 (25)	2 (7)	3 (16)	3 (25)	8 (22)	4 (10)	4 (13)	27(14)	6 (17)	1 (10)	1 (10)	0 (0)	8 (40)	0 (0)	16(16)	43(15)
8	Reduction of remittance tax rate to Japan	1(6)	1 (13)	4 (15)	0 (0)	2 (17)	7 (19)	4 (10)	1 (3)	20(10)	8 (22)	0 (0)	0 (0)	6 (46)	2 (10)	0 (0)	16(16)	36(12)
9	Simplification of standard inspection before release to the market (e.g. simplification of application procedures for use of alternatives by exemption of compulsory standards)	4(22)	0 (0)	0 (0)	3 (16)	0 (0)	2 (5)	1 (2)	0 (0)	10 (5)	2 (6)	0 (0)	0 (0)	0 (0)	2 (10)	0 (0)	4 (4)	14 (5)
-	Others	0(0)	0 (0)	0 (0)	1 (5)	0 (0)	2 (5)	2 (5)	0 (0)	5 (3)	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	0 (0)	1 (1)	6 (2)
Total		45	21	54	30	20	81	79	65	395	91	15	14	27	57	17	221	616
No. of firms		18	8	27	19	12	37	41	31	193	36	10	10	13	20	12	101	294(100 )

**(11) Requests to the Japanese government related to the Great East Japan Earthquake**

Regarding the requests to the Japanese government related to the Great East Japan Earthquake (check all that apply), the predominant response was “control of excessive yen appreciation” (57 percent), followed by “clear explanation about the nuclear accident” (56 percent) and “early recovery of domestic logistics network and expansion of its alternative” (23 percent). (Table 11-11)

**(Table 11-11) Requests to the Japanese government related to the Great East Japan Earthquake (check all that apply)**

**Unit: 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	Control of excessive yen appreciation	4 (25)	6 (60)	19 (70)	9 (36)	9 (75)	23 (56)	27 (71)	23 (74)	20 (60)	23 (62)	5 (56)	3 (23)	8 (67)	11 (46)	7 (47)	57 (52)	177 (57)
2	Clear explanation about the nuclear accident	9 (56)	8 (80)	13 (48)	13 (52)	7 (58)	27 (66)	19 (50)	17 (55)	13 (57)	19 (51)	2 (22)	9 (69)	9 (75)	13 (54)	10 (67)	62 (56)	175 (56)
3	Early recovery of domestic logistics network and expansion of its alternative	3 (19)	2 (20)	7 (26)	7 (28)	3 (25)	7 (17)	12 (32)	8 (26)	19 (25)	8 (22)	1 (11)	3 (23)	0 (0)	9 (38)	1 (7)	22 (20)	71 (23)
4	Confidence recovery to imported food from Japan	9 (56)	3 (30)	2 (7)	3 (12)	1 (8)	8 (20)	5 (13)	3 (10)	34 (17)	8 (22)	2 (22)	2 (15)	1 (8)	9 (38)	3 (20)	25 (23)	59 (19)
5	Facilitation of issue of radioactive substance certificate and certificate of origin	9 (56)	2 (20)	2 (7)	0 (0)	2 (17)	5 (12)	0 (0)	4 (13)	24 (12)	6 (16)	2 (22)	1 (8)	0 (0)	8 (33)	2 (13)	19 (17)	43 (14)
6	Support to relocation to overseas (including risk diversification)	0 (0)	1 (10)	2 (7)	5 (20)	2 (17)	4 (10)	5 (13)	1 (3)	20 (10)	2 (5)	0 (0)	1 (8)	4 (33)	3 (13)	4 (27)	14 (13)	34 (11)
7	Support to relocation within Japan	0 (0)	2 (20)	2 (7)	0 (0)	1 (8)	3 (7)	2 (5)	2 (6)	12 (6)	1 (3)	0 (0)	1 (8)	0 (0)	4 (17)	0 (0)	6 (5)	18 (6)
8	Research of alternative procurement destination of raw materials/parts	0 (0)	0 (0)	2 (7)	1 (4)	1 (8)	6 (15)	2 (5)	3 (10)	15 (8)	1 (3)	0 (0)	0 (0)	1 (8)	1 (4)	0 (0)	3 (3)	18 (6)
9	Relaxation of import procedures for parts tentatively manufactured overseas	0 (0)	0 (0)	2 (7)	0 (0)	0 (0)	2 (5)	1 (3)	3 (10)	8 (4)	4 (11)	0 (0)	0 (0)	0 (0)	3 (13)	0 (0)	7 (6)	15 (5)
10	Low-interest financing, moratorium	0 (0)	2 (20)	0 (0)	1 (4)	0 (0)	1 (2)	1 (3)	3 (10)	8 (4)	0 (0)	0 (0)	0 (0)	0 (0)	2 (8)	0 (0)	2 (2)	10 (3)
-	Others	0 (0)	0 (0)	0 (0)	2 (8)	0 (0)	2 (5)	1 (3)	1 (3)	6 (3)	1 (3)	0 (0)	1 (8)	0 (0)	0 (0)	1 (7)	3 (3)	9 (3)
Total		34	26	51	41	26	88	75	68	409	73	12	21	23	63	28	220	629
No. of firms		16	10	27	25	12	41	38	31	200	37	9	13	12	24	15	100	310 (100)