Survey of Business Sentiment on Japanese Corporations in Thailand for the 1st half of 2012

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JCC Economic Survey Team

Press Release 27 July 2012

Survey Period

Questionnaire request date June 1, 2012

Questionnaire response deadline June 29, 2012

Questionnaire response

This questionnaire was handed out to 1,364 JCC member corporations.
(Eleven governmental organizations are excluded).

No. of firms responding to this questionnaire
374 corporations

The response percentage
27.4%

*No. of firms directly affected by the 2011 Thailand floods to their buildings or facilities;
75 corporations (Manufacturers: 55, Non-manufacturers: 20)

No. of firms

	Industry	No.
Manufacturers	Food	14
	Textile	14
	Chemical	32
	Steel/ non-ferrous metal	30
	General machinery	12
	Electrical/ electronics machinery	44
	Transportation machinery	41
	Others	45
	Manufacturing sector total	232
Non-manufacturers	Trading	40
	Retailer	11
	Finance/ insurance/ securities	14
	Construction/ civil engineering	22
	Transportation/ communication	27
	Others	28
	Non- manufacturing sector total	142
	Total	374

Note

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

Report about response to this questionnaire

Please refer to the following pages.

1. BUSINESS SENTIMENT

(1) Summary

From the second half of 2011 to the second half of 2012, the target period of this survey, business sentiment has deteriorated due mainly to effect of the Thailand floods in the second half of 2011, while in the second half of 2012 it turned around. It is anticipated to continue "improving" in the second half of 2012. (Table 1-1)

(Table 1-1) Business Sentiment

Unit: %

	Past Surveys							Previous Survey			Survey this time		
	Result							Result	Forecast		Result	Forecast	
	07H2	08H1	08H2	09H1	09H2	10H1	10H2	11H1	11H2	12H1	11H2	12H1	12H2
Improving	49	57	21	15	71	72	71	57	27	64	21	70	66
No change	27	23	15	17	14	15	18	18	15	18	17	15	23
Deteriorating	24	20	65	68	16	12	12	25	58	18	62	15	11
(Ref) DI	25	37	▲ 44	▲ 53	55	60	59	32	▲ 31	46	▲ 41	55	55

(Note)
1. DI = "improving" – "deteriorating"
2. Since the fraction of a percentage is rounded off, the total may not equal 100 percent. This also applies to the tables below.

(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 is improving, even if the indicator declined from the previous term.

(2) The second half of 2011 (July – December)

The percentage of firms reporting that business sentiment was "improving" decreased by 36 points to 21 percent from the previous term (57%), whereas those reporting "deteriorating" increased by 37% to 62% from the previous term (25%). As a result, the diffusion Index (DI), which is the balance between "improving" and "deteriorating", was calculated at -41, 73 points lower than the previous term (+32) (Table 1-1).

The DI was "deteriorating" in all industries in the manufacturing sector. As a result, the overall DI in the manufacturing sector decreased by 75 points to -59 from the previous term (+16). For the non-manufacturing sector, it turned to "deteriorating" except for retail, finance/ insurance/ securities, and the construction/ civil engineering industries. As a result, the overall DI in the non-manufacturing sector decreased by 69 points to -10 from the previous term (+59). (Table 1-2)

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

The percentage of firms reporting that business performance was "improving" increased 49 points to 70% from the previous term (21%), whereas the percentage of firms reporting "deteriorating" decreased 47 points to 15% from the previous term (62%). As a result, the overall DI of +55 was higher by 96 points than the previous term (-41). (Table 1-1).

In the manufacturing sector, improvement speed decreased in all industries. As a result, the overall DI of +46 was higher than the previous period (-59) by 105 points. In the non-manufacturing sector, the improvement rate increased in all industries. As a result, the overall DI of +70 was higher than the previous period (-10) by 80 points. (Table 1-2).

(4) The second half of 2012 (July – December)

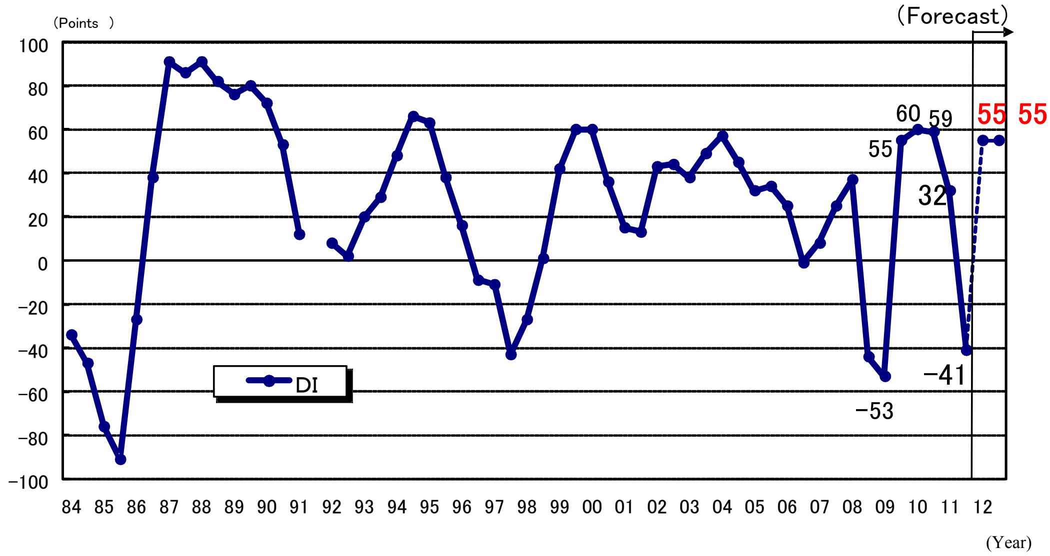
The percentage of firms reporting that business performance was “improving” decreased by 4 points to 66% from the previous term (70%), whereas the percentage of firms reporting “deteriorating” fell by 4 points to 11% from the previous term (15%). As a result, the overall DI is estimated at +55, the same as the previous term (+55). (Table 1-1).

In the manufacturing sector, the DI was expected to increase. As a result, the overall DI of +52 in the manufacturing sector was greater by 6 points than the previous period (+46). In the non-manufacturing sector, the overall DI in the non-manufacturing sector is expected to decline by 11 points to +59 from the previous period (+70). (Table 1-2).

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

		Past Surveys								Survey this time		
		Result						Forecast		Result	Forecast	
	Industry	08H2	09H1	09H2	10H1	10H2	11H1	11H2	12H1	11H2	12H1	12H2
Manufacturers	Food	27	33	54	0	0	29	▲ 14	14	▲ 31	23	50
	Textile	▲ 28	▲ 40	43	15	18	38	▲ 12	▲ 63	▲ 14	14	65
	Chemical	▲ 62	▲ 32	84	75	55	▲ 12	▲ 50	44	▲ 69	50	60
	Steel/ non-ferrous metal	▲ 70	▲ 88	70	96	68	18	▲ 57	60	▲ 87	62	57
	General machinery	▲ 50	▲ 57	70	77	47	57	▲ 29	86	▲ 17	75	50
	Electrical/ electronics machinery	▲ 55	▲ 35	74	65	38	27	▲ 67	8	▲ 77	28	46
	Transportation machinery	▲ 46	▲ 88	82	87	94	▲ 7	▲ 62	76	▲ 74	78	78
	Others	▲ 45	▲ 68	45	62	42	32	▲ 34	32	▲ 39	32	23
	Manufacturing sector total	▲ 46	▲ 57	69	67	52	16	▲ 49	44	▲ 59	46	52
Non-manufacturers	Trading	▲ 57	▲ 43	61	83	83	59	▲ 13	42	▲ 46	85	67
	Retailer	▲ 16	9	75	12	100	82	9	82	30	64	91
	Finance/ insurance/ securities	▲ 33	▲ 47	33	54	82	64	▲ 50	7	7	54	62
	Construction/ civil engineering	▲ 25	▲ 67	▲ 35	7	50	88	82	82	55	85	59
	Transportation/ communication	▲ 67	▲ 53	37	69	55	32	▲ 59	59	▲ 37	74	52
	Others	▲ 20	▲ 56	19	17	53	52	28	48	▲ 4	40	43
	Non-manufacturing sector total	▲ 39	▲ 47	34	48	70	59	▲ 3	50	▲ 10	70	59
Total		▲ 44	▲ 53	55	60	59	32	▲ 31	46	▲ 41	55	55

(Figure 1) Trend survey of the diffusion index (DI) in 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 firms reporting an "increase" in their total sales in 2011 fell by 28 points to 54% from the previous year (82%). The percentage of firms reporting a "more than 20% increase" in their total sales fell by 33 points to 13% from the previous year (46%). (Table 2-1 and Table 2-2).

Regarding sales forecasts for 2012, the firms anticipating an "increase" in their total sales rose by 22 points to 76% from the previous period (54%), and the percentage of firms anticipating a "more than 20% increase" in their total sales also rose by 20 points, from 13% in the previous period to 33%. (Table 2-1 and Table 2-3).

(Table 2-1) Change in total sales

Unit: %

	Past Surveys							Previous Survey		Survey this time	
	Result							Forecast		Result	Forecast
Year	04	05	06	07	08	09	10	11	12	11	12
Sales Increase	82	73	65	61	56	33	82	57	76	54	76
Sales increase more than 20%	44	27	17	14	14	6	46	15	24	13	33

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

(Table 2-2) Sales in 2011

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%	
Manufacturers	Food	9	(64)	0	(0)	3	(21)	6	(43)	1	(7)	4	(29)	0	(0)	2	(14)	2	(14)
	Textile	7	(50)	4	(29)	3	(21)	0	(0)	5	(36)	2	(14)	1	(7)	0	(0)	1	(7)
	Chemical	15	(47)	2	(6)	5	(16)	8	(25)	6	(19)	11	(34)	6	(19)	3	(9)	2	(6)
	Steel/non-ferrous metal	11	(44)	0	(0)	5	(20)	6	(24)	3	(12)	11	(44)	8	(32)	2	(8)	1	(4)
	General machinery	6	(50)	3	(25)	1	(8)	2	(17)	0	(0)	6	(50)	2	(17)	1	(8)	3	(25)
	Electrical/electronics machinery	16	(36)	4	(9)	4	(9)	8	(18)	6	(14)	22	(50)	5	(11)	4	(9)	13	(30)
	Transportation machinery	16	(39)	2	(5)	5	(12)	9	(22)	2	(5)	23	(56)	11	(27)	9	(22)	3	(7)
	Others	18	(43)	4	(10)	12	(29)	2	(5)	4	(10)	20	(48)	7	(17)	6	(14)	7	(17)
	Manufacturing sector total	98	(44)	19	(8)	38	(17)	41	(18)	27	(12)	99	(44)	40	(18)	27	(12)	32	(14)
Non-manufacturers	Trading	26	(68)	5	(13)	9	(24)	12	(32)	6	(16)	6	(16)	1	(3)	3	(8)	2	(5)
	Retailer	9	(82)	3	(27)	4	(36)	2	(18)	0	(0)	2	(18)	2	(18)	0	(0)	0	(0)
	Finance/insurance/securities	11	(85)	1	(8)	5	(38)	5	(38)	2	(15)	0	(0)	0	(0)	0	(0)	0	(0)
	Construction/civil engineering	16	(73)	9	(41)	6	(27)	1	(5)	5	(23)	1	(5)	0	(0)	0	(0)	1	(5)
	Transportation/communication	15	(60)	5	(20)	5	(20)	5	(20)	3	(12)	7	(28)	1	(4)	2	(8)	4	(16)
	Others	18	(69)	6	(23)	5	(19)	7	(27)	6	(23)	2	(8)	0	(0)	2	(8)	0	(0)
	Non-manufacturing sector total	95	(70)	29	(21)	34	(25)	32	(24)	22	(16)	18	(13)	4	(3)	7	(5)	7	(5)
	Total	193	(54)	48	(13)	72	(20)	73	(20)	49	(14)	117	(33)	44	(12)	34	(9)	39	(11)

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

Unit: No. of firms and (%)

Industry		Increase								No change		Decrease							
				More than 20%		10-20%		Less than 10%						Less than 10%		10-20%		More than 20%	
Manufacturers	Food	8	(57)	2	(14)	3	(21)	3	(21)	3	(21)	3	(21)	1	(7)	1	(7)	1	(7)
	Textile	8	(62)	2	(15)	3	(23)	3	(23)	2	(15)	3	(23)	0	(0)	0	(0)	3	(23)
	Chemical	22	(69)	8	(25)	7	(22)	7	(22)	6	(19)	4	(13)	2	(6)	1	(3)	1	(3)
	Steel/non-ferrous metal	21	(84)	7	(28)	8	(32)	6	(24)	1	(4)	3	(12)	2	(8)	0	(0)	1	(4)
	General machinery	10	(83)	4	(33)	4	(33)	2	(17)	1	(8)	1	(8)	0	(0)	0	(0)	1	(8)
	Electrical/electronics machinery	29	(66)	14	(32)	8	(18)	7	(16)	6	(14)	9	(20)	5	(11)	2	(5)	2	(5)
	Transportation machinery	38	(95)	22	(55)	12	(30)	4	(10)	0	(0)	2	(5)	1	(3)	1	(3)	0	(0)
	Others	26	(62)	11	(26)	9	(21)	6	(14)	4	(10)	12	(29)	7	(17)	2	(5)	3	(7)
	Manufacturing sector total	162	(73)	70	(32)	54	(24)	38	(17)	23	(10)	37	(17)	18	(8)	7	(3)	12	(5)
Non-manufacturers	Trading	31	(84)	11	(30)	11	(30)	9	(24)	4	(11)	2	(5)	1	(3)	1	(3)	0	(0)
	Retailer	11	(100)	4	(36)	2	(18)	5	(45)	0	(0)	0	(0)	0	(0)	0	(0)	0	(0)
	Finance/insurance/securities	9	(69)	2	(15)	5	(38)	2	(15)	4	(31)	0	(0)	0	(0)	0	(0)	0	(0)
	Construction/civil engineering	18	(82)	14	(64)	3	(14)	1	(5)	2	(9)	2	(9)	0	(0)	1	(5)	1	(5)
	Transportation/communication	20	(77)	11	(42)	7	(27)	2	(8)	3	(12)	3	(12)	0	(0)	1	(4)	2	(8)
	Others	20	(74)	7	(26)	11	(41)	2	(7)	4	(15)	3	(11)	0	(0)	2	(7)	1	(4)
	Non-manufacturing sector total	109	(80)	49	(36)	39	(29)	21	(15)	17	(13)	10	(7)	1	(1)	5	(4)	4	(3)
Total		271	(76)	119	(33)	93	(26)	59	(16)	40	(11)	47	(13)	19	(5)	12	(3)	16	(4)

3. NET PROFIT/LOSS

Firms reporting a "profit" in their 2011 before tax profit/loss accounted were 74%. Firms reporting an "increase" in their net profit (including the case that their loss will diminish or vanish) accounted for 30%, whereas those reporting a "decrease" in their net profit accounted for 5 %. (Table 3-1).

The percentage of firms anticipating a "profit" in their 2012 before tax profit/loss accounted for 83%. Firms anticipating an "increase" in their net profit accounted for 59%, whereas those anticipating a "decrease" in their net profit accounted for 20%. (Table 3-2).

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

Unit: No. of firms and (%)

	Industry	Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease
Manufacturers	Food	8 (57)	1 (7)	5 (36)	14	4 (29)	4 (29)	6 (43)
	Textile	7 (50)	0 (0)	7 (50)	14	6 (43)	3 (21)	5 (36)
	Chemical	26 (81)	2 (6)	4 (13)	32	6 (19)	7 (22)	19 (59)
	Steel/non-ferrous metal	20 (80)	0 (0)	5 (20)	25	2 (8)	2 (8)	21 (84)
	General machinery	9 (75)	0 (0)	3 (25)	12	5 (42)	0 (0)	7 (58)
	Electrical/electronics machinery	30 (68)	0 (0)	14 (32)	44	11 (25)	3 (7)	30 (68)
	Transportation machinery	33 (80)	1 (2)	7 (17)	41	3 (7)	5 (12)	33 (80)
	Others	28 (65)	2 (5)	13 (30)	43	12 (28)	10 (23)	21 (49)
	Manufacturing sector total	161 (72)	6 (3)	58 (26)	225	49 (22)	34 (15)	142 (63)
Non-manufacturers	Trading	30 (79)	1 (3)	7 (18)	38	11 (29)	8 (21)	19 (50)
	Retailer	11 (100)	0 (0)	0 (0)	11	9 (82)	1 (9)	1 (9)
	Finance/insurance/securities	9 (75)	0 (0)	3 (25)	12	4 (33)	5 (42)	3 (25)
	Construction/civil engineering	16 (73)	2 (9)	4 (18)	22	9 (41)	6 (27)	7 (32)
	Transportation/communication	21 (81)	2 (8)	3 (12)	26	15 (58)	5 (19)	6 (23)
	Others	18 (69)	3 (12)	5 (19)	26	12 (46)	7 (27)	7 (27)
	Non-manufacturing sector total	105 (78)	8 (6)	22 (16)	135	60 (44)	32 (24)	43 (32)
	Total	266 (74)	14 (4)	80 (22)	360	109 (30)	66 (18)	185 (51)

(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 the black, the break-even-point, or 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 for before tax profit/loss in 2012 (from the previous year)

Unit: No. of firms and (%)

	Industry	Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease
Manufacturers	Food	9 (69)	1 (8)	3 (23)	13	6 (46)	2 (15)	5 (38)
	Textile	10 (71)	0 (0)	4 (29)	14	8 (57)	3 (21)	3 (21)
	Chemical	27 (84)	4 (13)	1 (3)	32	19 (59)	3 (9)	10 (31)
	Steel/non-ferrous metal	21 (81)	1 (4)	4 (15)	26	17 (65)	5 (19)	4 (15)
	General machinery	10 (83)	1 (8)	1 (8)	12	9 (75)	2 (17)	1 (8)
	Electrical/electronics machinery	32 (73)	6 (14)	6 (14)	44	26 (59)	6 (14)	12 (27)
	Transportation machinery	37 (90)	0 (0)	4 (10)	41	30 (73)	7 (17)	4 (10)
	Others	35 (81)	2 (5)	6 (14)	43	22 (51)	10 (23)	11 (26)
	Manufacturing sector total	181 (80)	15 (7)	29 (13)	225	137 (61)	38 (17)	50 (22)
Non-manufacturers	Trading	33 (87)	2 (5)	3 (8)	38	22 (58)	10 (26)	6 (16)
	Retailer	11 (100)	0 (0)	0 (0)	11	6 (55)	1 (9)	4 (36)
	Finance/insurance/securities	11 (92)	0 (0)	1 (8)	12	6 (50)	4 (33)	2 (17)
	Construction/civil engineering	20 (91)	1 (5)	1 (5)	22	13 (59)	5 (23)	4 (18)
	Transportation/communication	24 (89)	3 (11)	0 (0)	27	15 (56)	8 (30)	4 (15)
	Others	20 (74)	3 (11)	4 (15)	27	15 (56)	9 (33)	3 (11)
	Non-manufacturing sector total	119 (87)	9 (7)	9 (7)	137	77 (56)	37 (27)	23 (17)
	Total	300 (83)	24 (7)	38 (10)	362	214 (59)	75 (21)	73 (20)

(Note) See table 3-1.

4. CAPITAL INVESTMENT (MANUFACTURING SECTOR)

The amount of planned capital investment (in the manufacturing sector) in 2012 is expected to increase by 64.6% from 2011. In terms of the number of firms, reporting an “increase” (52) is larger than for a “decrease” (42). (The total number of responding firms is 149.) (Table 4-1).

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

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

Unit: million baht and (%)

	2011	2012		No. of firms				
Industry	Amount	Amount	Increase %	Increase	No change	Decrease	Undecided	Total
Food	477	735	54.0	0 (0)	4 (50)	3 (38)	1 (13)	8
Textile	2,078	5,191	149.8	2 (25)	2 (25)	3 (38)	1 (13)	8
Chemical	4,116	5,705	38.6	8 (36)	9 (41)	4 (18)	1 (5)	22
Steel/Non-ferrous metal	3,386	3,526	4.2	10 (38)	5 (19)	11 (42)	0 (0)	26
General machinery	256	615	140.2	3 (50)	2 (33)	1 (17)	0 (0)	6
Electrical/Electronics machinery	20,464	32,585	59.2	9 (38)	8 (33)	6 (25)	1 (4)	24
Transportation machinery	22,435	41,010	82.8	12 (50)	5 (21)	7 (29)	0 (0)	24
Others	12,261	18,406	50.1	8 (26)	15 (48)	7 (23)	1 (3)	31
Manufacturing sector total	65,472	107,773	64.6	52 (35)	50 (34)	42 (28)	5 (3)	149

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

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

Unit: No. of firms and (%)

	Industry	New	Expansion	Replacement	Streamlining	Flood recovery	Others	Total	Response
Manufacturers	Food	5 (45)	1 (9)	6 (55)	3 (27)	1 (9)	0 (0)	16	11
	Textile	3 (23)	4 (31)	8 (62)	4 (31)	2 (15)	0 (0)	21	13
	Chemical	7 (23)	8 (27)	15 (50)	11 (37)	0 (0)	0 (0)	41	30
	Steel/Non-ferrous metal	9 (33)	10 (37)	16 (59)	2 (7)	1 (4)	1 (4)	39	27
	General machinery	3 (27)	3 (27)	6 (55)	3 (27)	2 (18)	1 (9)	18	11
	Electrical/Electronics machinery	21 (48)	20 (45)	20 (45)	8 (18)	10 (23)	2 (5)	81	44
	Transportation machinery	25 (61)	22 (54)	17 (41)	8 (20)	0 (0)	0 (0)	72	41
	Others	19 (50)	8 (21)	14 (37)	7 (18)	1 (3)	3 (8)	52	38
	Manufacturing sector total	92 (43)	76 (35)	102 (47)	46 (21)	17 (8)	7 (3)	340	215

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

Unit: No. of firms and (%)

	Industry	New	Expansion	Replacement	Streamlining	Flood recovery	Others	Total	Response
Manufacturers	Food	5 (42)	2 (17)	6 (50)	4 (33)	3 (25)	0 (0)	20	12
	Textile	3 (21)	6 (43)	7 (50)	4 (29)	8 (57)	2 (14)	30	14
	Chemical	11 (34)	10 (31)	16 (50)	10 (31)	1 (3)	0 (0)	48	32
	Steel/Non-ferrous metal	8 (30)	15 (56)	12 (44)	4 (15)	2 (7)	2 (7)	43	27
	General machinery	6 (60)	3 (30)	2 (20)	3 (30)	2 (20)	0 (0)	16	10
	Electrical/Electronics machinery	24 (55)	15 (34)	19 (43)	12 (27)	19 (43)	5 (11)	94	44
	Transportation machinery	28 (68)	22 (54)	17 (41)	14 (34)	6 (15)	0 (0)	87	41
	Others	19 (49)	14 (36)	10 (26)	9 (23)	7 (18)	3 (8)	62	39
	Manufacturing sector total	104 (47)	87 (40)	89 (41)	60 (27)	48 (22)	12 (5)	400	219

5. EXPORT TREND

The percentage of firms reporting an “increase” in their exports accounted for 35% in the first half of 2012 and 44% in the second half of 2012. (Table 5-1 and Table 5-2).

(Table 5-1) Export in 2012 (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 (50)	0 (0)	4 (33)	2 (17)	5 (42)	1 (8)	0 (0)	0 (0)	1 (8)	12
Textile	3 (21)	1 (7)	1 (7)	1 (7)	4 (29)	7 (50)	3 (21)	0 (0)	4 (29)	14
Chemical	7 (24)	1 (3)	3 (10)	3 (10)	15 (52)	7 (24)	1 (3)	3 (10)	3 (10)	29
Steel/Non-ferrous metal	3 (14)	0 (0)	0 (0)	3 (14)	13 (62)	5 (24)	2 (10)	1 (5)	2 (10)	21
General machinery	2 (17)	0 (0)	1 (8)	1 (8)	8 (67)	2 (17)	0 (0)	1 (8)	1 (8)	12
Electrical/Electronics machinery	22 (50)	6 (14)	9 (20)	7 (16)	7 (16)	15 (34)	3 (7)	3 (7)	9 (20)	44
Transportation machinery	17 (45)	6 (16)	3 (8)	8 (21)	12 (32)	9 (24)	4 (11)	2 (5)	3 (8)	38
Others	13 (33)	3 (8)	4 (10)	6 (15)	14 (35)	13 (33)	3 (8)	4 (10)	6 (15)	40
Manufacturing sector total	73 (35)	17 (8)	25 (12)	31 (15)	78 (37)	59 (28)	16 (8)	14 (7)	29 (14)	210
Trading	10 (33)	1 (3)	5 (17)	4 (13)	17 (57)	3 (10)	1 (3)	1 (3)	1 (3)	30
Retailer	0 (0)	0 (0)	0 (0)	0 (0)	2(100)	0 (0)	0 (0)	0 (0)	0 (0)	2
Construction	2 (67)	0 (0)	1 (33)	1 (33)	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	3
Others	1(100)	1(100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
Non-manufacturing sector total	13 (36)	2 (6)	6 (17)	5 (14)	20 (56)	3 (8)	1 (3)	1 (3)	1 (3)	36
Total	86 (35)	19 (8)	31 (13)	36 (15)	98 (40)	62 (25)	17 (7)	15 (6)	30 (12)	246

(Table 5-2) Export in 2012 (the second half)

Unit: No. of firms and (%)

Industry	The second half of 2011									
	Increase				No Change	Decrease				Total
		More than 20% increase	10-20% increase	Less than 10% increase			Less than 10% decrease	10-20% decrease	More than 20% decrease	
Food	6 (50)	0 (0)	4 (33)	2 (17)	5 (42)	1 (8)	0 (0)	0 (0)	1 (8)	12
Textile	7 (50)	1 (7)	3 (21)	3 (21)	4 (29)	3 (21)	2 (14)	0 (0)	1 (7)	14
Chemical	7 (24)	1 (3)	3 (10)	3 (10)	13 (45)	9 (31)	2 (7)	3 (10)	4 (14)	29
Steel/Non-ferrous metal	3 (14)	1 (5)	1 (5)	1 (5)	13 (62)	5 (24)	3 (14)	0 (0)	2 (10)	21
General machinery	5 (42)	2 (17)	1 (8)	2 (17)	7 (58)	0 (0)	0 (0)	0 (0)	0 (0)	12
Electrical/Electronics machinery	28 (64)	10 (23)	9 (20)	9 (20)	6 (14)	10 (23)	4 (9)	1 (2)	5 (11)	44
Transportation machinery	17 (44)	3 (8)	6 (15)	8 (21)	15 (38)	7 (18)	4 (10)	1 (3)	2 (5)	39
Others	19 (48)	5 (13)	6 (15)	8 (20)	14 (35)	7 (18)	2 (5)	3 (8)	2 (5)	40
Manufacturing sector total	92 (44)	23 (11)	33 (16)	36 (17)	77 (36)	42 (20)	17 (8)	8 (4)	17 (8)	211
Trading	14 (47)	3 (10)	4 (13)	7 (23)	16 (53)	0 (0)	0 (0)	0 (0)	0 (0)	30
Retailer	0 (0)	0 (0)	0 (0)	0 (0)	2(100)	0 (0)	0 (0)	0 (0)	0 (0)	2
Construction	2 (67)	0 (0)	2 (67)	0 (0)	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	3
Others	1(100)	0 (0)	1(100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
Non-manufacturing sector total	17 (47)	3 (8)	7 (19)	7 (19)	19 (53)	0 (0)	0 (0)	0 (0)	0 (0)	36
Total	109 (44)	26 (11)	40 (16)	43 (17)	96 (39)	42 (17)	17 (7)	8 (3)	17 (7)	247

(Table 5-3) Export in 2012 (Full Year)

Unit: No. of firms and (%)

Industry	The second half of 2011									
	Increase				No Change	Decrease				Total
		More than 20% increase	10-20% increase	Less than 10% increase			Less than 10% decrease	10-20% decrease	More than 20% decrease	
Food	6 (50)	0 (0)	4 (33)	2 (17)	5 (42)	1 (8)	0 (0)	0 (0)	1 (8)	12
Textile	6 (43)	1 (7)	1 (7)	4 (29)	5 (36)	3 (21)	1 (7)	0 (0)	2 (14)	14
Chemical	7 (24)	1 (3)	1 (3)	5 (17)	14 (48)	8 (28)	4 (14)	2 (7)	2 (7)	29
Steel/Non-ferrous metal	4 (18)	1 (5)	0 (0)	3 (14)	13 (59)	5 (23)	2 (9)	2 (9)	1 (5)	22
General machinery	3 (27)	2 (18)	0 (0)	1 (9)	8 (73)	0 (0)	0 (0)	0 (0)	0 (0)	11
Electrical/Electronics machinery	26 (59)	9 (20)	8 (18)	9 (20)	6 (14)	12 (27)	6 (14)	1 (2)	5 (11)	44
Transportation machinery	19 (49)	8 (21)	3 (8)	8 (21)	12 (31)	8 (21)	5 (13)	2 (5)	1 (3)	39
Others	18 (45)	4 (10)	6 (15)	8 (20)	11 (28)	11 (28)	5 (13)	4 (10)	2 (5)	40
Manufacturing sector total	89 (42)	26 (12)	23 (11)	40 (19)	74 (35)	48 (23)	23 (11)	11 (5)	14 (7)	211
Trading	15 (50)	3 (10)	4 (13)	8 (27)	15 (50)	0 (0)	0 (0)	0 (0)	0 (0)	30
Retailer	0 (0)	0 (0)	0 (0)	0 (0)	2(100)	0 (0)	0 (0)	0 (0)	0 (0)	2
Construction	2 (67)	0 (0)	2 (67)	0 (0)	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	3
Others	1(100)	0 (0)	1(100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
Non-manufacturing sector total	18 (50)	3 (8)	7 (19)	8 (22)	18 (50)	0 (0)	0 (0)	0 (0)	0 (0)	36
Total	107 (43)	29 (12)	30 (12)	48 (19)	92 (37)	48 (19)	23 (9)	11 (4)	14 (6)	247

6. PROSPECTIVE FUTURE MARKETS

For the prospective future markets (check all that apply), the predominant response was “Indonesia” (52%) followed by “Vietnam” (37%) and “India” (34%), “Japan” (30%), and “Myanmar” was 5th. (Table 6).

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

Unit : No of firms and (%)

	Industry	Indonesia	Vietnam	India	Japan	Myanmar	China	Cambodia	Malaysia	Middle East	Laos	Singapore	Europe	USA	Philippines	Latin America	Oceania	Others	Total	No.of firms
Manufacturers	Food	4 (33)	5 (42)	0 (0)	8 (67)	4 (33)	1 (8)	2 (17)	2 (17)	0 (0)	2 (17)	2 (17)	3 (25)	2 (17)	1 (8)	1 (8)	0 (0)	0 (0)	35	12
	Textile	6 (43)	6 (43)	3 (21)	4 (29)	3 (21)	2 (14)	1 (7)	2 (14)	0 (0)	1 (7)	1 (7)	2 (14)	3 (21)	0 (0)	0 (0)	1 (7)	0 (0)	33	14
	Chemical	17 (61)	13 (46)	11 (39)	4 (14)	5 (18)	5 (18)	3 (11)	2 (7)	3 (11)	3 (11)	1 (4)	2 (7)	2 (7)	4 (14)	1 (4)	1 (4)	3 (11)	73	28
	Steel/Non-ferrouse	9 (39)	10 (43)	6 (26)	5 (22)	6 (26)	0 (0)	1 (4)	1 (4)	5 (22)	1 (4)	0 (0)	1 (4)	0 (0)	0 (0)	3 (13)	1 (4)	1 (4)	43	23
	General Machinery	8 (73)	9 (82)	3 (27)	0 (0)	3 (27)	2 (18)	2 (18)	1 (9)	1 (9)	2 (18)	0 (0)	0 (0)	0 (0)	0 (0)	1 (9)	0 (0)	0 (0)	29	11
	Electric/electronics	22 (51)	14 (33)	19 (44)	14 (33)	9 (21)	11 (26)	6 (14)	7 (16)	7 (16)	5 (12)	9 (21)	5 (12)	4 (9)	4 (9)	2 (5)	1 (2)	2 (5)	128	43
	Transportation	23 (62)	6 (16)	11 (30)	7 (19)	2 (5)	3 (8)	1 (3)	4 (11)	3 (8)	1 (3)	0 (0)	4 (11)	0 (0)	4 (11)	3 (8)	3 (8)	2 (5)	70	37
	Others	13 (33)	10 (25)	14 (35)	12 (30)	7 (18)	7 (18)	6 (15)	9 (23)	8 (20)	3 (8)	3 (8)	3 (8)	5 (13)	2 (5)	5 (13)	1 (3)	4 (10)	100	40
	Manufacturing sector	102 (49)	73 (35)	67 (32)	54 (26)	39 (19)	31 (15)	22 (11)	28 (13)	27 (13)	18 (9)	16 (8)	20 (10)	16 (8)	15 (7)	16 (8)	8 (4)	12 (6)	511	208
Non-manufacturers	Trading	22 (73)	14 (47)	12 (40)	19 (63)	15 (50)	11 (37)	9 (30)	3 (10)	0 (0)	6 (20)	6 (20)	2 (7)	4 (13)	1 (3)	0 (0)	1 (3)	3 (10)	121	30
	Retailer	1 (50)	0 (0)	0 (0)	0 (0)	2 (100)	0 (0)	0 (0)	1 (50)	1 (50)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4	2
	Construction	1 (25)	2 (50)	3 (75)	2 (50)	2 (50)	0 (0)	1 (25)	0 (0)	0 (0)	1 (25)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (25)	0 (0)	11	4
	Others	4 (67)	3 (50)	3 (50)	0 (0)	5 (83)	1 (17)	3 (50)	2 (33)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (33)	0 (0)	0 (0)	0 (0)	23	6
	Non-manufacturing	28 (67)	19 (45)	18 (43)	21 (50)	24 (57)	12 (29)	13 (31)	6 (14)	1 (2)	7 (17)	6 (14)	2 (5)	4 (10)	3 (7)	0 (0)	2 (5)	3 (7)	159	42
Total		130 (52)	92 (37)	85 (34)	75 (30)	63 (25)	43 (17)	35 (14)	34 (14)	28 (11)	25 (10)	22 (9)	22 (9)	20 (8)	18 (7)	16 (6)	10 (4)	15 (6)	670	250
Thia time		1	2	3	4	5	6	7	8	9	10	11	11	13	14	15	16	-		
previous time		2	4	3	1	6	5	10	8	12	12	8	11	7	16	14	15	-		
last but one time		2	3	1	5	-	4	-	7	8	-	14	6	10	12	11	12	-		

(Note1) Europe includes Russia
(Note2) The 9th rank in the last but one survey was CLM (Cambodia , Laos and Myanmar)

7. EXCHANGE RATES USED IN BUSINESS PLANS

(1) Thai baht / US dollar

With reference to the exchange rate used in business plans (Thai baht / US dollar), the predominant response was “a range between not less than 30.0 but less than 30.5 and not less than 31.0 but less than 31.5 ” (31.8%), followed by “not less than 30.5 but less than 31.0” (13.3%). (Table 7-1).

(Table 7-1) Exchange rates used in business plans (Thai baht / US dollar)

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

Thai baht / US dollar	Manufacture									Non-manufacture					
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electrical/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total	Grand total	
Not less than 28.0 but less than 28.5	0	0	0	0	0	1	0	0	1	0	0	0	0	1	(0.5)
Not less than 28.5 but less than 29.0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(0.0)
Not less than 29.0 but less than 29.5	1	0	0	0	0	0	0	1	2	0	0	0	0	2	(0.9)
Not less than 29.5 but less than 30.0	0	1	0	0	0	0	0	2	3	1	0	0	1	4	(1.9)
Not less than 30.0 but less than 30.5	3	4	14	4	1	13	3	10	52	10	0	5	15	67	(31.8)
Not less than 30.5 but less than 31.0	3	1	0	2	2	7	7	3	25	3	0	0	3	28	(13.3)
Not less than 31.0 but less than 31.5	1	6	8	6	1	10	12	10	54	11	1	1	13	67	(31.8)
Not less than 31.5 but less than 32.0	1	0	2	3	1	2	3	3	15	2	0	0	2	17	(8.1)
Not less than 32.0 but less than 32.5	1	0	3	1	0	3	1	2	11	2	0	5	7	18	(8.5)
Not less than 32.5 but less than 33.0	0	0	0	0	0	0	0	1	1	0	0	0	0	1	(0.5)
Not less than 33.0 but less than 33.5	0	1	0	0	0	0	1	1	3	2	0	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	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	0	0	0	1	0	0	1	0	0	0	0	1	(0.5)
Not less than 35.5 but less than 36.0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(0.0)
No. of firms	10	13	27	16	5	37	27	33	168	31	1	11	43	211	

	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electrical/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total	Grand total
Average	30.52	30.72	30.63	29.32	30.85	30.76	31.01	30.77	30.62	30.87	31.00	31.00	30.90	30.68
Median	30.50	31.00	30.00	31.00	30.80	30.80	31.00	31.00	31.00	31.00	31.00	31.01	31.00	31.00
Mode	30.00	31.00	30.00	31.00	#N/A	30.00	31.00	31.00	30.00	30.00	#N/A	32.00	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 is more than one value that has the largest number of respondents, “#N/A” (not applicable) is entered.

(At the time of the previous survey)

	Manufacturers									Non-manufacturers				
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electrical/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total	Grand total
Average	30.18	29.52	32.46	30.65	30.78	30.05	30.54	32.29	30.96	30.47	30.65	30.40	30.47	30.87
Median	30.00	29.25	30.00	30.25	30.00	30.00	30.00	30.20	30.00	30.00	30.65	30.00	30.00	30.00
Mode	30.00	29.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	30.00	#N/A	30.00	30.00	30.00

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

(2) Japanese yen / Thai baht

With reference to the exchange rate used in business plans (Japanese yen / Thai baht), the predominant response was “not less than 2.5 but less than 2.6” (47.1%), followed by “not less than 2.6 but less than 2.7” (34.5%). (Table 7-2).

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

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

	Manufacture									Non-manufacture					
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electrical/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total	Grand 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	3	2	5	5	3	18	4	0	2	6	24	(11.7)
Not less than 2.5 but less than 2.6	4	5	13	6	3	19	15	9	74	18	0	5	23	97	(47.1)
Not less than 2.6 but less than 2.7	3	5	8	9	4	10	8	13	60	8	1	2	11	71	(34.5)
Not less than 2.7 but less than 2.8	3	3	5	1	0	2	3	10	27	1	0	3	4	31	(15.0)
Not less than 2.8 but less than 2.9	0	0	0	0	0	0	1	2	3	1	0	0	1	4	(1.9)
Not less than 2.9 but less than 3.0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	(0.0)
Not less than 3.0 but less than 3.1	0	0	0	0	0	2	1	0	3	0	0	0	0	3	(1.5)
No. of firms	10	13	26	16	7	33	28	34	167	28	1	10	39	206	

Average	2.60	2.60	2.58	2.55	2.53	2.56	2.57	2.62	2.58	2.54	2.63	2.55	2.55	2.57
Median	2.60	2.60	2.58	2.60	2.50	2.50	2.54	2.60	2.60	2.50	2.63	2.50	2.50	2.56
Mode	2.50	2.60	2.50	2.60	2.60	2.50	2.50	2.60	2.50	2.50	#N/A	2.50	2.50	2.50

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

(At the time of the previous survey)

	Manufacturers									Non-manufacturers				
	Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electrical/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Others	Non-manufacturing sector total	Grand total
Average	2.79	2.74	2.77	2.74	2.72	2.66	2.72	2.76	2.73	2.71	2.65	2.72	2.71	2.73
Median	2.80	2.83	2.75	2.73	2.76	2.70	2.70	2.75	2.74	2.70	2.65	2.70	2.70	2.70
Mode	2.70	2.90	2.70	2.80	2.80	2.70	2.70	2.70	2.70	2.70	#N/A	2.70	2.70	2.70

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

8. PROCUREMENT SOURCE OF PARTS/ MATERIALS

The ratio of procurement sources in 2011 (simple average of respondents) was 57.9% for ASEAN, including 49.9% for Thailand. (Table 8-1).

Regarding the ratio of planned procurement sources in 2012, the percentage of ASEAN is expected to be 58.5%, including 50.0% for Thailand. (Table 8-2)

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

Unit: (%)

Industry		ASEAN			Japan	China	Others	Total	No. of firms
			Thailand	ASEAN (except Thailand)					
Manufacturing sector	Food	81.8	72.8	9.0	5.5	1.7	11.0	100.0	12
	Textile	62.5	56.3	6.3	13.2	8.7	15.6	100.0	14
	Chemical	62.0	52.1	9.9	30.5	1.4	6.0	100.0	30
	Steel/Non-ferrous metal	39.6	33.1	6.5	55.1	3.1	2.2	100.0	23
	General machinery	55.0	45.9	9.1	34.5	5.0	5.5	100.0	11
	Electrical/Electronics machinery	56.3	47.8	8.5	33.4	8.5	1.8	100.0	38
	Transportation machinery	59.7	53.3	6.4	36.1	2.4	1.9	100.0	40
	Others	54.0	47.7	6.3	33.9	2.4	9.7	100.0	40
	Manufacturing average	58.9	51.1	7.8	30.3	4.1	6.7	100.0	208
Non-manufacture	Trading	63.6	47.0	16.5	33.2	2.7	0.5	100.0	31
	Retailer	41.0	33.0	8.0	49.0	4.0	6.0	100.0	5
	Construction	80.0	76.7	3.3	15.0	3.3	1.7	100.0	6
	Others	43.3	38.3	5.0	33.3	16.7	6.7	100.0	3
	Non-manufacturing average	57.0	48.8	8.2	32.6	6.7	3.7	100.0	45
Total		57.9	49.9	8.0	31.5	5.4	5.2	100.0	253

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

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

Unit: (%)

Industry		ASEAN			Japan	China	Others	Total	No. of firms
			Thailand	ASEAN (except Thailand)					
Manufacturing sector	Food	89.8	76.6	13.2	4.7	2.1	3.5	100.0	12
	Textile	60.4	51.5	8.9	13.1	10.6	15.9	100.0	14
	Chemical	62.7	52.9	9.8	29.0	2.2	6.0	100.0	30
	Steel/Non-ferrous metal	41.1	34.2	6.9	52.7	3.4	2.8	100.0	24
	General machinery	59.6	49.6	10.0	29.9	4.5	6.0	100.0	10
	Electrical/Electronics machinery	56.6	47.3	9.3	32.4	9.3	1.8	100.0	38
	Transportation machinery	56.1	52.1	4.0	30.2	2.4	11.2	100.0	41
	Others	54.2	47.3	6.8	33.5	2.3	10.1	100.0	40
	Manufacturing average	60.1	51.4	8.6	28.2	4.6	7.2	100.0	209
Non-manufacture	Trading	64.7	46.9	17.8	31.5	3.0	0.8	100.0	31
	Retailer	40.0	32.0	8.0	48.0	6.0	6.0	100.0	5
	Construction	80.0	76.7	3.3	15.8	3.3	0.8	100.0	6
	Others	43.3	38.3	5.0	20.0	30.0	6.7	100.0	3
	Non-manufacturing average	57.0	48.5	8.5	28.8	10.6	3.6	100.0	45
Total		58.5	50.0	8.6	28.5	7.6	5.4	100.0	254

(Note) See Table 8-1.

9. PROBLEMS WITH CORPORATE MANAGEMENT

Regarding problems with corporate management (check all that apply), the predominant response was “increase of total labor cost” (56%) followed by “intensified competition by competitors” (54%) and “lack of human resources at manager-level” (44%). (Table 9).

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

Unit : No. of firms and (%)

Previosu time	This time		Manufacturers									Non-manufacturers							
			Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electrical/electronics machinery	Transportation machinery	others	Manufacturing sector total	Trading	Retailer	Finance/Insurance/ Securities	Construction/Civil engineering	Transportation/communication	Others	Non-manufacturing sector total	Grand ttoal
3	1	Increase of total labor cost	8 (57)	10 (71)	18 (58)	19 (66)	6 (50)	33 (75)	30 (73)	25 (56)	149 (65)	12 (30)	5 (45)	4 (29)	7 (32)	18 (67)	13 (46)	59 (42)	208 (56)
1	2	Intensified competition by competitors	6 (43)	5 (36)	17 (55)	15 (52)	8 (67)	23 (52)	23 (56)	21 (47)	118 (51)	23 (58)	8 (73)	8 (57)	11 (50)	19 (70)	14 (50)	83 (58)	201 (54)
2	3	Resources at manager-level	2 (14)	4 (29)	12 (39)	12 (41)	7 (58)	17 (39)	21 (51)	16 (36)	91 (40)	17 (43)	9 (82)	4 (29)	16 (73)	16 (59)	11 (39)	73 (51)	164 (44)
4	4	Decrease of selling price (price war)	7 (50)	6 (43)	14 (45)	17 (59)	9 (75)	26 (59)	25 (61)	16 (36)	120 (52)	14 (35)	2 (18)	1 (7)	6 (27)	11 (41)	6 (21)	40 (28)	160 (43)
6	5	Resources at workers/staff-level	7 (50)	7 (50)	9 (29)	12 (41)	5 (42)	20 (45)	15 (37)	18 (40)	93 (40)	6 (15)	6 (55)	2 (14)	16 (73)	16 (59)	8 (29)	54 (38)	147 (40)
5	6	Hike in material prices	12 (86)	4 (29)	19 (61)	6 (21)	5 (42)	22 (50)	18 (44)	23 (51)	109 (47)	9 (23)	2 (18)	0 (0)	11 (50)	9 (33)	5 (18)	36 (25)	145 (39)
7	7	Foreign exchange fluctuation	3 (21)	3 (21)	9 (29)	8 (28)	5 (42)	13 (30)	11 (27)	14 (31)	66 (29)	20 (50)	3 (27)	2 (14)	2 (9)	4 (15)	7 (25)	38 (27)	104 (28)
8	8	Job hopping by employees	2 (14)	1 (7)	7 (23)	2 (7)	2 (17)	6 (14)	9 (22)	11 (24)	40 (17)	9 (23)	3 (27)	4 (29)	10 (45)	6 (22)	9 (32)	41 (29)	81 (22)
9	9	Quality management	2 (14)	3 (21)	3 (10)	6 (21)	5 (42)	5 (11)	8 (20)	6 (13)	38 (17)	1 (3)	0 (0)	0 (0)	4 (18)	2 (7)	1 (4)	8 (6)	46 (12)
10	10	Changes in products/users' needs	3 (21)	2 (14)	0 (0)	0 (0)	1 (8)	6 (14)	3 (7)	4 (9)	19 (8)	2 (5)	1 (9)	3 (21)	0 (0)	5 (19)	1 (4)	12 (8)	31 (8)
11	11	Excessive employment	1 (7)	1 (7)	0 (0)	0 (0)	0 (0)	3 (7)	1 (2)	4 (9)	10 (4)	0 (0)	0 (0)	0 (0)	1 (5)	1 (4)	2 (7)	4 (3)	14 (4)
12	12	Difficulty in collecting money from customers	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	1 (9)	1 (7)	0 (0)	5 (19)	1 (4)	9 (6)	9 (2)
13	13	Difficulty in obtaining financial support	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (5)	2 (5)	1 (2)	5 (2)	0 (0)	0 (0)	2 (14)	1 (5)	0 (0)	0 (0)	3 (2)	8 (2)
15	14	Excessive capital investment	0 (0)	0 (0)	0 (0)	1 (3)	0 (0)	0 (0)	1 (2)	2 (4)	4 (2)	0 (0)	0 (0)	0 (0)	1 (5)	0 (0)	0 (0)	1 (1)	5 (1)
14	15	Intellectual property rights	0 (0)	1 (7)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (7)	2 (1)	3 (1)
-	-	Others	0 (0)	0 (0)	1 (3)	0 (0)	0 (0)	0 (0)	2 (5)	1 (2)	4 (2)	3 (8)	1 (9)	2 (14)	3 (14)	1 (4)	1 (4)	11 (8)	15 (4)
		Total	53	47	109	98	53	176	169	162	867	117	41	33	89	113	81	474	1,341
		No. of firms	14	14	31	29	12	44	41	45	230	40	11	14	22	27	28	142	372 (100)

10. REQUESTS TO THE THAI GOVERNMENT

Regarding requests to the Thai government (check all that apply), the predominant response was “development and implementation of Customs-related systems” (46%) followed by “relaxation of the Foreign Business Act” (31%), and “improvement of education and human resource development” (27 %). (Table 10)

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

Unit : No. of firms and (%)

Previosu time	This time		Manufacturers									Non-manufacturers							
			Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electrical/electronics machinery	Transportation machinery	others	Manufacturing sector total	Trading	Retailer	Finance/Insurance/ Securities	Construction/Civil engineering	Transportation/communication	Others	Non-manufacturing sector total	Grand ttoal
2	1	Development and implementation of Customs-related systems	10 (77)	7 (50)	19 (61)	15 (50)	6 (50)	21 (50)	17 (44)	17 (40)	112 (50)	23 (61)	6 (55)	0 (0)	4 (19)	13 (48)	9 (33)	55 (40)	167 (46)
4	2	Relaxation of the Foreign Business Act	4 (31)	4 (29)	8 (26)	4 (13)	2 (17)	12 (29)	10 (26)	9 (21)	53 (24)	16 (42)	4 (36)	7 (54)	9 (43)	13 (48)	10 (37)	59 (43)	112 (31)
6	3	Improvement of education/human resource development	2 (15)	4 (29)	8 (26)	11 (37)	4 (33)	13 (31)	9 (23)	14 (33)	65 (29)	10 (26)	2 (18)	7 (54)	2 (10)	6 (22)	5 (19)	32 (23)	97 (27)
7	4	Work permit/visa-related issues	1 (8)	3 (21)	5 (16)	3 (10)	3 (25)	9 (21)	2 (5)	10 (23)	36 (16)	15 (39)	1 (9)	7 (54)	15 (71)	8 (30)	11 (41)	57 (42)	93 (26)
5	5	development in the Bangkok Metropolitan area	2 (15)	3 (21)	11 (35)	7 (23)	2 (17)	11 (26)	6 (15)	10 (23)	52 (23)	13 (34)	5 (45)	3 (23)	4 (19)	7 (26)	7 (26)	39 (28)	91 (25)
3	6	Implementation of tax-related systems	2 (15)	3 (21)	6 (19)	3 (10)	3 (25)	16 (38)	9 (23)	12 (28)	54 (24)	11 (29)	2 (18)	6 (46)	8 (38)	3 (11)	2 (7)	32 (23)	86 (24)
1	7	Stabilization of political/security situation	0 (0)	1 (7)	12 (39)	10 (33)	4 (33)	11 (26)	22 (56)	12 (28)	72 (32)	1 (3)	0 (0)	0 (0)	2 (10)	5 (19)	4 (15)	12 (9)	84 (23)
8	8	Prevention of labor disputes	0 (0)	1 (7)	12 (39)	12 (40)	3 (25)	9 (21)	21 (54)	9 (21)	67 (30)	1 (3)	0 (0)	0 (0)	1 (5)	5 (19)	3 (11)	10 (7)	77 (21)
10	9	infrastructure development liking Thailand with neighboring countries	0 (0)	6 (43)	7 (23)	3 (10)	2 (17)	6 (14)	3 (8)	0 (0)	27 (12)	6 (16)	1 (9)	2 (15)	0 (0)	5 (19)	2 (7)	16 (12)	43 (12)
11	10	Promotion of regional operating headquarters (e.g.ROH, IPC)	0 (0)	0 (0)	1 (3)	0 (0)	0 (0)	5 (12)	3 (8)	2 (5)	11 (5)	1 (3)	1 (9)	1 (8)	2 (10)	0 (0)	1 (4)	6 (4)	17 (5)
9	11	Measures to prevent expansion of any new-type or flu influenza	0 (0)	1 (7)	0 (0)	0 (0)	2 (17)	1 (2)	1 (3)	2 (5)	7 (3)	2 (5)	0 (0)	1 (8)	2 (10)	2 (7)	1 (4)	8 (6)	15 (4)
-	-	Others	1 (8)	2 (14)	3 (10)	1 (3)	0 (0)	2 (5)	1 (3)	3 (7)	13 (6)	1 (3)	0 (0)	0 (0)	2 (10)	2 (7)	0 (0)	5 (4)	18 (5)
Total			22	35	92	69	31	116	104	100	569	100	22	34	51	69	55	331	900
No. of firms			13	14	31	30	12	42	39	43	224	38	11	13	21	27	27	137	361 (100)

11. IMPACT OF THE 2011 THAILAND FLOODS

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

With reference to the impacts of the 2011 Thailand floods on business operation, the percentage of the firms responding “direct damage to buildings or facilities” was 21 percent, while that of the firms responding “indirect damage due to customers/suppliers affected” was 61 percent.

Of the firms responding “direct damage to buildings or facilities,” the percentages were in the textile industry (50%), the electric/ electronics machinery (43%) and general machinery industries (33%). Many firms in all the industries reported “indirect damage due to customers/suppliers affected.” (Table 11-1)

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

Unit: No. of firms and (%)

Industry		Direct damage		Indirect damage		No impact in particular		No. of firms
Manufacture	Food	4	(29)	7	(50)	3	(21)	14
	Textile	7	(50)	5	(36)	2	(14)	14
	Chemical	2	(6)	20	(65)	9	(29)	31
	Steel/non-ferrous metal	3	(11)	21	(75)	4	(14)	28
	General machinery	4	(33)	5	(42)	3	(25)	12
	Electric/electronics machinery	19	(43)	25	(57)	0	(0)	44
	Transportation machinery	6	(15)	29	(73)	5	(13)	40
	Others	10	(23)	26	(60)	7	(16)	43
	Manufacturing sector total	55	(24)	138	(61)	33	(15)	226
Non-manufacture	Trading	3	(8)	30	(77)	6	(15)	39
	Retailer	1	(9)	8	(73)	2	(18)	11
	Finance/insurance/securities	1	(7)	7	(50)	6	(43)	14
	Construction/civil engineering	8	(38)	6	(29)	7	(33)	21
	Transportation/communication	5	(19)	16	(62)	5	(19)	26
	Others	2	(7)	19	(68)	7	(25)	28
	Non-manufacturing sector total	20	(14)	86	(62)	33	(24)	139
Total		75	(21)	224	(61)	66	(18)	365

(2) Expected resumption of operation and resumption status

The expected resumption size of operation showed 90.2% of the size before the floods. Some firms plan to resume their operation in full while some others expect major reduction or undecided. (Table 11-2)

As to the resumption status, average of all industries was 82.0% of expected size. However, a full recovery is still on its way given some firms with low recovery rate as well as some not started the process. (Table 11-3)

(Table 11-2) Expected resumption of operation (Pre-flood=100%)

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
Not less than 0 but less than 25	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Not less than 25% but less than 50%	0	1	0	0	1	1	0	0	3	0	0	0	0	0	0	0	3
Not less than 50% but less than 75%	0	1	1	1	0	4	1	4	12	0	0	0	1	0	0	1	13
Not less than 75% but less than 100%	0	1	0	0	0	5	0	2	8	1	0	0	1	1	0	3	11
100%	2	5	0	2	3	9	5	4	30	2	1	1	5	4	1	14	44
Not less than 100%	0	0	1	0	0	0	0	0	1	0	0	0	1	0	0	1	2
No. of firms	2	8	2	3	4	19	6	10	54	3	1	1	8	5	1	19	73
Minimum	100.0	30.0	60.0	70.0	30.0	33.0	50.0	60.0	30.0	90.0	100.0	100.0	70.0	80.0	100.0	70.0	30.0
Maximum	100.0	100.0	110.0	100.0	100.0	100.0	100.0	100.0	110.0	100.0	100.0	100.0	200.0	100.0	100.0	200.0	200.0
Average	100.0	84.4	85.0	90.0	82.5	85.4	91.7	84.5	86.4	96.7	100.0	100.0	106.3	96.0	100.0	101.1	90.2

(Note 1) Targets are firms directly affected
(Note 2) Pre-flood operation size is 100%
(Note 3) One firm responded “undecided”

(Table 11-3) Expected resumption of operation (Pre-flood=100%)

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
Not less than 0% but less than 25%	1	0	0	0	1	0	0	1	3	0	0	0	0	0	0	0	3
Not less than 25% but less than 50%	0	1	1	1	0	2	0	0	5	0	0	0	0	0	0	0	5
Not less than 50% but less than 75%	0	1	0	0	1	3	1	4	10	0	0	0	0	0	0	0	10
Not less than 75% but less than 100%	1	4	0	1	2	10	2	2	22	2	0	0	2	1	0	5	27
100%	1	1	1	1	0	4	3	3	14	1	1	1	6	4	1	14	28
No. of firms	3	7	2	3	4	19	6	10	54	3	1	1	8	5	1	19	73
Minimum	0.0	45.0	30.0	40.0	20.0	40.0	70.0	10.0	0.0	80.0	100.0	100.0	80.0	80.0	100.0	80.0	0.0
Maximum	100.0	100.0	100.0	100.0	95.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average	63.3	82.1	65.0	78.3	70.0	80.8	89.2	70.5	77.5	86.7	100.0	100.0	95.0	96.0	100.0	94.7	82.0

(Note 1) Targets are firms directly affected
(Note 2) Estimated full recovery is 100% (Not pre-flood operation size is 100%)

(3) Expected resumption of operation

For the expected resumption of operation in manufacturing sector, the predominant response among firms directly affected was “December 2011” (25 percent), while a considerable amount of the firms require longer time till resumption, including “October to December 2012” (21 percent) and “ 2013 ” (6 percent) as well as “ Unforeseeable”. (Table 11-4)

(Table 11-4) Expected resumption of operation

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
December 2011	1	1	1	1	0	5	1	2	12 (25)	4	3	2	3	1	1	14 (74)	26 (39)
January–March 2012	1	0	0	0	1	1	4	1	8 (17)	1	0	0	2	0	0	3 (16)	11 (16)
April-June 2012	0	0	0	0	2	4	1	0	7 (15)	0	0	0	0	0	0	0 (0)	7 (10)
July-September 2012	0	1	0	0	2	3	1	0	7 (15)	0	0	0	0	0	0	0 (0)	7 (10)
October-December 2012	0	1	1	1	0	3	0	4	10 (21)	1	0	0	0	1	0	2 (11)	12 (18)
2013	1	0	1	0	0	1	0	0	3 (6)	0	0	0	0	0	0	0 (0)	3 (4)
Unforeseeable	1	0	0	0	0	0	0	0	1 (2)	0	0	0	0	0	0	0 (0)	1 (1)
Total	4	3	3	2	5	17	7	7	48 (100)	6	3	2	5	2	1	19 (100)	67 (100)

(Note) Targets are firms directly affected

(4) Location of alternative production

As for the location of alternative production (check all that apply), predominant responses in all industries were “continue business in the existing premises” (82%) followed by “moving to East Thailand” (18%). In manufacturing sector, 15% responded “partial transfer to other countries” (Table 11-5)

(Table 11-5) Location of alternative production (check all that apply)

Unit: No. of firms and (%)

Industry		No relocation	Relocation to the Eastern Thailand	Relocation to the Central Thailand	Relocation to the Western Thailand	Relocation to the North Thailand	Relocation to the South Thailand	Relocation to Eastern Thailand	Partial relocation to outside Thailand	Business closure in Thailand	No. of firms
Manufacture	Food	3 (100)	1 (33)	0 (0)	1 (33)	0 (0)	0 (0)	0 (0)	1 (33)	0 (0)	3
	Textile	7 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	7
	Chemical	1 (33)	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	1 (33)	0 (0)	0 (0)	3
	Steel/Non-ferrous metal	2 (67)	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	1 (33)	0 (0)	0 (0)	3
	General machinery	4 (80)	0 (0)	1 (20)	0 (0)	1 (20)	0 (0)	0 (0)	0 (0)	0 (0)	5
	Electric/Electronics machinery	14 (82)	3 (18)	0 (0)	0 (0)	1 (6)	2 (12)	0 (0)	6 (35)	0 (0)	17
	Transportation machinery	3 (50)	0 (0)	1 (17)	0 (0)	0 (0)	0 (0)	1 (17)	1 (17)	0 (0)	6
	Others	9 (90)	3 (30)	1 (10)	0 (0)	1 (10)	0 (0)	0 (0)	0 (0)	0 (0)	10
	Manufacturing sector total	43 (80)	9 (17)	3 (6)	1 (2)	3 (6)	2 (4)	3 (6)	8 (15)	0 (0)	54
Non-manufacture	Trading	3 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3
	Retailer	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
	Finance/insurance/securities	1 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1
	Construction/civil engineering	6 (86)	1 (14)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	7
	Transportation/communication	4 (80)	3 (60)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	5
	Others	2 (100)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2
	Non-manufacturing sector total	17 (89)	4 (21)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	19
Total		60 (82)	13 (18)	3 (4)	1 (1)	3 (4)	2 (3)	3 (4)	8 (11)	0 (0)	73

(Note) Targets are firms directly affected

(5) Sales

Monthly sales (average) of firms directly affected by the floods saw an increase of 113.2% in the non-manufacturing sector over the monthly average prior to the floods, while the manufacturing sector is 75.5% (Table 11-6)

(Table 11-6) Sales (Pre-flood monthly sales=100%)

Unit: % and No. of firms

		Manufacture									Non-manufacture							
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electrical/Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication	Others	Non-manufacturing sector total	Grand Total
All industries	Minimum	0.0	20.0	20.0	20.0	80.0	30.0	70.0	10.0	0.0	60.0	90.0	90.0	60.0	70.0	10.0	10.0	0.0
	Maximum	120.0	130.0	250.0	200.0	130.0	200.0	135.0	150.0	250.0	200.0	124.0	120.0	200.0	200.0	200.0	200.0	250.0
	Average	91.9	78.9	102.7	104.0	100.9	95.5	108.2	96.3	99.1	100.7	105.1	104.4	132.6	111.3	101.4	108.3	102.5
	Median	100.0	90.0	100.0	100.0	100.0	100.0	110.0	100.0	100.0	100.0	101.0	100.0	120.0	105.0	100.0	100.0	100.0
	No. of firms	13	13	31	28	11	43	40	43	222	39	10	9	19	27	26	130	352
Firms directly affected	Minimum	0.0	20.0	20.0	20.0	85.0	30.0	70.0	10.0	0.0	70.0	100.0	100.0	60.0	70.0	100.0	60.0	0.0
	Maximum	100.0	100.0	60.0	80.0	110.0	200.0	120.0	120.0	200.0	110.0	100.0	100.0	200.0	150.0	100.0	200.0	200.0
	Average	61.3	56.6	40.0	53.3	100.0	81.7	96.7	74.5	75.5	86.7	100.0	100.0	130.6	109.0	100.0	113.2	85.3
	Median	72.5	50.0	40.0	60.0	102.5	80.0	95.0	72.5	80.0	80.0	100.0	100.0	122.5	105.0	100.0	110.0	87.0
	No. of firms	4	7	2	3	4	18	6	10	54	3	1	1	8	5	1	19	73

(Note 1) Pre-flood monthly sale is 100%.
(Note 2) Median value is shown located in the center of spread in order to minimize bias caused by the number of respondents.

(6) Receipt of Insurance Payout

For receipt of insurance payout, predominant responses were "received only initial installment" (58%) followed by "received all payout" (18%) while 11% responded "No payout" (Table 11-7)

(Table 11-7) Receipt of Insurance Payout

Unit: No. of firms and (%)

Industry		Full receipt		Only initial installment received		No payout		Other		No. of firms
Manufacturing	Food	0	(0)	1	(20)	2	(40)	2	(40)	5
	Textile	2	(29)	3	(43)	1	(14)	1	(14)	7
	Chemical	0	(0)	2	(100)	0	(0)	0	(0)	2
	Steel/Non-ferrous metal	1	(33)	1	(33)	0	(0)	1	(33)	3
	General machinery	1	(33)	1	(33)	1	(33)	0	(0)	3
	Electrical/Electronics machinery	2	(11)	16	(84)	0	(0)	1	(5)	19
	Transportation machinery	1	(17)	5	(83)	0	(0)	0	(0)	6
	Others	2	(20)	5	(50)	0	(0)	3	(30)	10
	Manufacturing sector total	9	(16)	34	(62)	4	(7)	8	(15)	55
Non-manufacturing	Trading	0	(0)	2	(100)	0	(0)	0	(0)	2
	Retailer	0	(0)	0	(0)	1	(100)	0	(0)	1
	Finance/insurance/securities	0	(0)	0	(0)	0	(0)	1	(100)	1
	Construction/civil engineering	2	(29)	2	(29)	3	(43)	0	(0)	7
	Transportation/communication	2	(50)	2	(50)	0	(0)	0	(0)	4
	Others	0	(0)	1	(100)	0	(0)	0	(0)	1
	Non-manufacturing sector total	4	(25)	7	(44)	4	(25)	1	(6)	16
Total		13	(18)	41	(58)	8	(11)	9	(13)	71

(Note) Target is firms directly affected

(7) Insurance Coverage

For insurance coverage in all industries, 37% responded “purchased insurance not covering floods” and 35% “purchased insurance covering floods (including partial coverage)”. In the manufacturing sector, responses were “purchased insurance covering floods (including partial coverage)” (42%) and “purchased insurance not covering floods” (37%) (Table 11-8).

(Table 11-8) Insurance coverage

Unit: No. of firms and (%)

	Industry	Purchased insurance covering floods		Purchased insurance not covering floods		Not updated		Others		To be updated		No. of firms
Manufacturers	Food	2	(15)	5	(38)	2	(15)	0	(0)	4	(31)	13
	Textile	8	(62)	5	(38)	0	(0)	0	(0)	0	(0)	13
	Chemical	13	(43)	11	(37)	2	(7)	1	(3)	3	(10)	30
	Steel/non-ferrous metal	12	(44)	11	(41)	2	(7)	0	(0)	2	(7)	27
	General machinery	4	(40)	5	(50)	0	(0)	0	(0)	1	(10)	10
	Electrical/electronics machinery	17	(39)	14	(32)	1	(2)	1	(2)	11	(25)	44
	Transportation machinery	15	(38)	17	(44)	2	(5)	1	(3)	4	(10)	39
	Others	21	(48)	13	(30)	3	(7)	0	(0)	1	(2)	44
	Manufacturing sector total	92	(42)	81	(37)	12	(5)	3	(1)	26	(12)	220
Non-manufacturers	Trading	11	(29)	12	(32)	8	(21)	2	(5)	5	(13)	38
	Retailer	2	(20)	5	(50)	0	(0)	1	(10)	2	(20)	10
	Finance/insurance/securities	1	(9)	4	(36)	0	(0)	3	(27)	3	(27)	11
	Construction/civil engineering	4	(21)	9	(47)	3	(16)	1	(5)	2	(11)	19
	Transportation/communication	8	(30)	13	(48)	1	(4)	0	(0)	5	(19)	27
	Others	4	(17)	6	(26)	6	(26)	0	(0)	1	(4)	23
	Non-manufacturing sector total	30	(23)	49	(38)	18	(14)	7	(5)	18	(14)	128
	Total	122	(35)	130	(37)	30	(9)	10	(3)	44	(13)	348

(Note) Including partial coverage for insurance covering floods.

(8) Increase in Insurance Premium

Increase in insurance premium (average) renewed after the floods saw all industries 104.5% (2.1 times). While for firms directly affected it increased 214.6% on average for all industries (3.2 times).

(Table 11-9) Increase in insurance premium

Unit: %, No. of firms

		Manufacturers									Non-manufacturers							
		Food	Textile	Chemical	Steel/non-ferrous metal	General machinery	Electrical/electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication	Others	Non-manufacturing sector total	Grand Total
All industries	Minimum	30.0	10.0	2.0	3.0	25.0	5.0	3.0	5.0	2.0	10.0	18.0	16.4	5.0	11.0	10.0	5.0	2.0
	Maximum	200.0	500.0	300.0	400.0	800.0	500.0	500.0	300.0	800.0	400.0	283.0	150.0	200.0	400.0	400.0	400.0	800.0
	Average	110.0	178.4	71.2	79.8	204.2	159.7	96.2	65.1	112.9	71.5	76.2	62.8	53.9	80.9	176.0	82.0	104.5
	Median	100.0	110.0	30.0	30.0	35.0	140.0	30.0	30.0	40.0	28.0	30.0	22.0	50.0	27.5	130.0	30.0	37.0
	No. of firms	5	11	17	15	6	26	21	19	120	11	5	3	9	12	5	45	165
Firms directly affected	Minimum	30.0	10.0	300.0	30.0	25.0	5.0	150.0	30.0	5.0	400.0	283.0	-	10.0	11.0	400.0	10.0	5.0
	Maximum	200.0	500.0	300.0	400.0	800.0	500.0	500.0	270.0	800.0	400.0	283.0	-	200.0	400.0	400.0	400.0	800.0
	Average	140.0	226.0	300.0	215.0	375.0	248.1	290.0	90.0	236.0	400.0	283.0	-	63.3	137.2	400.0	153.5	214.6
	Median	190.0	206.0	300.0	215.0	300.0	250.0	300.0	30.0	228.0	400.0	283.0	-	50.0	50.0	400.0	50.0	200.0
	No. of firms	3	7	2	2	3	14	5	4	40	1	1	0	6	5	1	14	54

(Note 1) Target is firms that renewed insurance after the floods

(Note 2) Median value is shown located in the center of spread in order to minimize bias caused by the number of respondents and existence of values away from the centre.

(9) Flood-related requests to the Thai government

Regarding floods-related requests to the Thai government (check all that apply), the predominant response was "Implementation of flood control plan" (82%), followed by "Speedy and accurate information provision in English" (57%) and "Foundation of reinsurance system" (37%). 35% of the manufacturing sector that suffered accommodative damages requested "early refund of import duty". (Table 11-10).

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

Unit: No. of firms and (%)

Rank		Manufacturers									Non-manufacturers							Grand total
		Food	Textile	Chemical	Steel/non-ferrous metals	General machinery	Electrical/electronics machinery	Transportation machinery	Others	Total	Trading	Retailer	Finance/insurance/securities	Construction/civil engineering	Transportation/communication	Others	Total	
1	Implementation of flood control measures as planned	12(86)	12 (92)	21(68)	26(87)	9 (75)	43(98)	35(90)	36(80)	194(85)	28(70)	10 (91)	11(79)	17(85)	23(85)	20(71)	109(78)	303 (82)
2	Speedy and accurate information provision in English	5 (36)	6 (46)	25(81)	17(57)	9 (75)	26(59)	17(44)	22(49)	127(56)	26(65)	4 (36)	8 (57)	10(50)	19(70)	15(54)	82(59)	209 (57)
3	Reinforcement of a reinsurance system	6 (43)	6 (46)	14(45)	10 (33)	5 (42)	24 (55)	9 (23)	22(49)	96(42)	16(40)	4 (36)	4 (29)	8 (40)	7 (26)	1 (4)	40(29)	136 (37)
4	Improvement in image of Thailand	1 (7)	3 (23)	6 (19)	0(0)	2 (17)	7 (16)	3 (8)	9 (20)	31(14)	9(23)	0 (0)	1 (7)	3 (15)	4 (15)	8 (29)	25(18)	56 (15)
5	Early refund of Customs duty	3 (21)	4 (31)	5 (16)	3 (10)	1 (8)	7 (16)	7 (18)	6 (13)	36(16)	4(10)	1(9)	1 (7)	3 (15)	3 (11)	0 (0)	12(9)	48 (13)
-	Others	0 (0)	1 (8)	0 (0)	1 (3)	1 (8)	0 (0)	2 (5)	2 (4)	7(3)	1(3)	0 (0)	0 (0)	0(0)	1 (4)	0 (0)	2(1)	9 (2)
Total		27	32	71	57	27	107	73	97	491	84	19	25	41	57	44	270	761
No. of firms		14	13	31	30	12	44	39	45	228	40	11	14	20	27	28	140	368 (100)

12. Wage increase and lack of labour force

(1) Impacts of operating profit of your company by minimum wage increase based on a lower corporate tax rate.
With reference to the impacts of minimum wage increase and lack of labour force on business profit, the predominant response was "negative impacts" (65percent), "no changes" (22 percent), "positive impacts" (7 percent). The percentages of the firms responding "negative impacts" were 79 percent. (Table 12-1)

(Table 12-1) Impacts of minimum wage increase for operating profit

Unit: No. of firms and (%)

業 種		Positive impacts		Negative impacts		No impact		Unknown		No. of firms
Manufacture	Food	0	(0)	11	(79)	2	(14)	1	(7)	14
	Textile	0	(0)	12	(86)	1	(7)	1	(7)	14
	Chemical	4	(13)	18	(58)	6	(19)	3	(10)	31
	Steel/Non-ferrous metal	2	(7)	18	(62)	8	(28)	1	(3)	29
	General machinery	0	(0)	11	(92)	1	(8)	0	(0)	12
	Electric/Electronics machinery	0	(0)	40	(91)	2	(5)	2	(5)	44
	Transportation machinery	2	(5)	34	(87)	3	(8)	0	(0)	39
	Others	1	(2)	36	(82)	5	(11)	2	(5)	44
	Manufacturing sector total	9	(4)	180	(79)	28	(12)	10	(4)	227
Non-manufacture	Trading	8	(20)	8	(20)	20	(50)	4	(10)	40
	Retailer	1	(9)	7	(64)	2	(18)	1	(9)	11
	Finance/Insurance/Securities	1	(7)	3	(21)	8	(57)	2	(14)	14
	Construction/Civil engineering	1	(5)	12	(60)	6	(30)	1	(5)	20
	Transportation/Communication	2	(8)	18	(69)	5	(19)	1	(4)	26
	Others	4	(15)	9	(35)	10	(38)	3	(12)	26
	Non-Manufacturing sector total	17	(12)	57	(42)	51	(37)	12	(9)	137
	Total	26	(7)	237	(65)	79	(22)	22	(6)	364

(Note1) Minimum wage was increased 40% as from April 2012, while corporate tax rate was decreased from 30% to 23% from January 2012.
(Note2) "Positive impacts"and "Negative impacts" mean increase of profit and decrease of profit

(2) Measures against minimum wage increase (check all that apply)

As for the correspondence of impacts by minimum wage increase for the wage perspective (check all that apply), the predominant response was “Wage increase at a fixed amount (rate) for employees paid exceeding the minimum level” (51 percent)followed by “Wage increase to the minimum level” (44 percent). (Table 12-2-1)

And as for the correspondence of impacts by minimum wage increase for the management perspective, the predominant response was “Improvement of investment efficiency”(48 percent)followed by “Restriction of new employment” (29 percent) respectively. The answer “Others” includes “price-shift”, “implementation of seminars”, “nothing to do at all”. (Table 12-2-2)

(Table 12-2-1) Factors of impacts by minimum wage increase on business performance (wage perspective)

Unit: No. of firms and (%)

Rank		Manufacture									Non-manfucture							
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electric/Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/Insurance/Securities	Construction/Civil engineering	Transportation/Communication	Others	Non-Manufacturing sector total	Total
1	Wage increase at a fixed amount (rate) for employees paid above the minimum level	6 (43)	11 (79)	16 (52)	16 (55)	7 (58)	32 (73)	25 (63)	27 (60)	140 (61)	12 (32)	7 (64)	3 (21)	9 (43)	10 (37)	8 (30)	49 (36)	189 (51)
2	Wage increase to the minimum level	5 (36)	8 (57)	11 (35)	16 (55)	7 (58)	22 (50)	13 (33)	17 (38)	99 (43)	12 (32)	6 (55)	4 (29)	8 (38)	19 (70)	12 (44)	61 (44)	160 (44)
3	Maintain the current wage (no increase)	3 (21)	0 (0)	4 (13)	0 (0)	1 (8)	2 (5)	0 (0)	2 (4)	12 (5)	14 (37)	2 (18)	8 (57)	4 (19)	1 (4)	7 (26)	36 (26)	48 (13)
4	Wage increase at a certain amount for all	1 (7)	0 (0)	4 (13)	6 (21)	1 (8)	6 (14)	9 (23)	10 (22)	37 (16)	2 (5)	0 (0)	0 (0)	1 (5)	3 (11)	1 (4)	7 (5)	44 (12)
5	Others	3 (21)	0 (0)	2 (6)	2 (7)	2 (17)	1 (2)	3 (8)	2 (4)	15 (7)	2 (5)	1 (9)	1 (7)	3 (14)	3 (11)	4 (15)	14 (10)	29 (8)
	Total	18	19	37	40	18	63	50	58	303	42	16	16	25	36	32	167	470
	No. of firms	14	14	31	29	12	44	40	45	229	38	11	14	21	27	27	138	367 (100)

(Table 12-2-2) Factors of impacts by minimum wage increase on business performance (management perspective)

Unit: No. of firms and (%)

Rank		Manufacture									Non-manfucture							
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electric/Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/Insurance/Securities	Construction/Civil engineering	Transportation/Communication	Others	Non-Manufacturing sector total	Total
1	Improvement of investment efficiency	5 (56)	6 (50)	14 (64)	9 (45)	7 (78)	23 (61)	24 (73)	19 (50)	107 (59)	5 (17)	3 (50)	3 (30)	4 (40)	4 (22)	2 (17)	21 (25)	128 (48)
2	Restriction of new employment	1 (11)	6 (50)	6 (27)	7 (35)	1 (11)	14 (37)	10 (30)	9 (24)	54 (30)	9 (31)	0 (0)	0 (0)	1 (10)	8 (44)	6 (50)	24 (28)	78 (29)
3	Employment adjustment	1 (11)	2 (17)	1 (5)	0 (0)	0 (0)	2 (5)	1 (3)	2 (5)	9 (5)	0 (0)	0 (0)	1 (10)	2 (20)	2 (11)	0 (0)	5 (6)	14 (5)
4	No renewal of contract with temporary employees	0 (0)	1 (8)	0 (0)	1 (5)	1 (11)	2 (5)	0 (0)	2 (5)	7 (4)	0 (0)	0 (0)	0 (0)	1 (10)	2 (11)	0 (0)	3 (4)	10 (4)
5	Transfer of part of production line to other countries	0 (0)	1 (8)	0 (0)	0 (0)	0 (0)	1 (3)	1 (3)	4 (11)	7 (4)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	7 (3)
-	Others	2 (22)	1 (8)	6 (27)	5 (25)	0 (0)	9 (24)	5 (15)	7 (18)	35 (19)	15 (52)	3 (50)	6 (60)	2 (20)	3 (17)	5 (42)	34 (40)	69 (26)
	Total	9	17	27	22	9	51	41	43	219	29	6	10	10	19	13	87	306
	No. of firms	9	12	22	20	9	38	33	38	181	29	6	10	10	18	12	85	266 (100)

(3) Increase rate of minimum wage increase on April 1, 2012

The medium percentage of increasing minimum wage on April 1st, 2012, the predominant response was "Employees paid less than the new minimum wage" (29.3percent), followed by "All employees" (13.4 percent), "Employees paid not less than the new minimum wage" (11.7). Based on the category of industry, transportation machinery and other manufacturers appeared to be higher increasing rate. (Table 12-3)

(Table 12-3) Increase rate of minimum wage increase on April 1, 2012

Unit: No. of firms and (%)

	Manufacture									Non-manufacture							
	Food	Textile	Chemical	Steel /Non-ferrous metal	General machinery	Electric /Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/Insurance /Securities	Construction /Civil engineering	Transportation /Communication	Others	Non-Manufacturing sector total	Total
Employees paid less than the new minimum wage																	
minimum	10.0	17.0	10.0	5.0	10.0	5.0	9.0	13.0	5.0	10.0	10.0	20.0	8.4	2.0	5.0	2.0	2.0
maximum	40.0	40.0	41.0	46.0	40.0	46.0	50.0	50.0	50.0	43.0	36.0	40.0	50.5	40.0	30.0	50.5	50.5
average	27.6	31.3	27.4	30.9	24.1	33.8	34.3	34.7	31.8	23.0	24.9	30.0	23.1	21.0	16.5	21.9	29.3
No. of firms	10	14	22	22	10	36	29	31	174	11	7	2	11	19	8	58	232
Employees paid not less than the new minimum wage																	
minimum	4.5	4.0	3.8	0.5	1.0	0.7	1.0	1.0	0.5	3.0	3.0	0.0	3.0	2.0	4.0	0.0	0.0
maximum	20.0	35.0	31.0	40.0	30.0	30.0	50.0	50.0	50.0	35.0	14.0	10.0	18.5	17.1	18.0	35.0	50.0
average	9.9	11.2	10.9	11.6	11.4	10.9	15.1	15.7	13.0	9.3	7.2	3.3	8.5	7.9	7.9	7.9	11.7
No. of firms	9	13	21	22	9	36	60	30	200	14	8	7	12	18	9	68	268
All employees																	
minimum	4.0	5.0	0.2	4.0	2.0	2.0	4.0	2.0	0.2	0.1	3.2	0.0	1.0	1.8	1.0	0.0	0.0
maximum	32.0	33.0	24.0	38.0	30.0	30.0	40.0	37.0	40.0	30.0	39.5	18.2	16.0	28.2	18.5	39.5	40.0
average	14.3	16.4	11.2	15.7	14.1	14.7	18.0	17.8	15.6	8.7	14.7	4.6	7.5	10.4	7.1	8.8	13.4
No. of firms	10	13	24	26	11	40	34	39	197	24	9	10	14	23	15	95	292

(4)Impact on business by minimum wage increase to 300 Baht throughout the country in 2013

As for the effects of minimum wage increase in 2013, the predominant response for business perspective was “Increased labor cost against total cost” (77 percent), followed by “Decrease in profit” (66 percent), “Increase in selling price” (13 percent). Others include “raise of buying price” and “required rationalization”. (Table 12-4-1)

For the labour perspective, the predominant response was “Review of remuneration system” (62 percent) followed by “Restriction of employment” (27 percent), “Outflow of employees” (27 percent). Others include “difficulty of recruitment”, “increase productivity” (Table 12-4-2)

(Table 12-4-1) Impact on business by minimum wage increase to 300 Baht throughout the country in 2013[Business aspect](check all that apply)

Unit: No. of firms and (%)

Rank		Manufacture									Non-manufacture							
		Food	Textile	Chemical	Steel /Non-ferrous metal	General machinery	Electric /Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/Insurance /Securities	Construction /Civil engineering	Transportation /Communication	Others	Non-Manufacturing sector total	Total
1	Increased labor cost against total cost	10 (100)	14 (100)	24 (77)	24 (86)	9 (75)	35 (80)	35 (90)	36 (80)	187 (84)	16 (44)	7 (70)	5 (50)	18 (86)	23 (92)	11 (50)	80 (65)	267 (77)
2	Decrease in profit	8 (80)	8 (57)	17 (55)	16 (57)	8 (67)	42 (95)	32 (82)	34 (76)	165 (74)	14 (39)	3 (30)	4 (40)	13 (62)	20 (80)	9 (41)	63 (51)	228 (66)
3	Increase in selling price	4 (40)	5 (36)	7 (23)	0 (0)	3 (25)	7 (16)	2 (5)	5 (11)	33 (15)	2 (6)	1 (10)	2 (20)	4 (19)	1 (4)	2 (9)	12 (10)	45 (13)
4	Decrease in sales	1 (10)	2 (14)	1 (3)	0 (0)	1 (8)	4 (9)	1 (3)	5 (11)	15 (7)	0 (0)	0 (0)	0 (0)	1 (5)	2 (8)	2 (9)	5 (4)	20 (6)
5	Increase in sales	1 (10)	0 (0)	1 (3)	0 (0)	1 (8)	0 (0)	0 (0)	1 (2)	4 (2)	3 (8)	1 (10)	1 (10)	1 (5)	0 (0)	3 (14)	9 (7)	13 (4)
6	Transfer all or part of business to other countries	0 (0)	0 (0)	0 (0)	1 (4)	1 (8)	1 (2)	1 (3)	6 (13)	10 (4)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	1 (1)	11 (3)
7	Business contraction in local areas	0 (0)	1 (7)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)	1 (3)	0 (0)	0 (0)	1 (5)	1 (4)	0 (0)	3 (2)	4 (1)
8	Increase in profit	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	2 (2)	2 (1)
-	Others	0 (0)	0 (0)	6 (19)	3 (11)	0 (0)	3 (7)	2 (5)	4 (9)	18 (8)	8 (22)	2 (20)	2 (20)	2 (10)	0 (0)	4 (18)	18 (15)	36 (10)
Total		24	30	56	44	23	92	73	91	433	45	14	14	40	47	33	193	626
No. of firms		10	14	31	28	12	44	39	45	223	36	10	10	21	25	22	124	347 (100)

(Table 12-4-2) Impact on business by minimum wage increase to 300 Baht throughout the country in 2013 [Labour aspect] (check all that apply)

Unit: No. of firms and (%)

Rank		Manufacture									Non-manufacture							
		Food	Textile	Chemical	Steel /Non-ferrous metal	General machinery	Electric /Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/Insurance /Securities	Construction /Civil engineering	Transportation /Communication	Others	Non-Manufacturing sector total	Total
1	Review of remuneration system	7 (88)	8 (57)	22 (73)	15 (56)	6 (60)	25 (58)	28 (74)	21 (50)	132 (62)	17 (53)	7 (70)	6 (75)	11 (69)	17 (68)	9 (47)	67 (61)	199 (62)
2	Restriction of employment	2 (25)	5 (36)	8 (27)	8 (30)	3 (30)	19 (44)	13 (34)	10 (24)	68 (32)	6 (19)	0 (0)	0 (0)	1 (6)	9 (36)	4 (21)	20 (18)	88 (27)
3	Outflow of employment	1 (13)	7 (50)	4 (13)	6 (22)	3 (30)	12 (28)	11 (29)	23 (55)	67 (32)	1 (3)	3 (30)	1 (13)	3 (19)	8 (32)	4 (21)	20 (18)	87 (27)
4	Employment adjustment	1 (13)	1 (7)	1 (3)	3 (11)	1 (10)	2 (5)	2 (5)	2 (5)	13 (6)	2 (6)	0 (0)	0 (0)	1 (6)	3 (12)	0 (0)	6 (5)	19 (6)
-	Others	1 (13)	0 (0)	3 (10)	5 (19)	0 (0)	2 (5)	0 (0)	3 (7)	14 (7)	7 (22)	2 (20)	2 (25)	3 (19)	2 (8)	5 (26)	21 (19)	35 (11)
Total		12	21	38	37	13	60	54	59	294	33	12	9	19	39	22	134	428
No. of firms		8	14	30	27	10	43	38	42	212	32	10	8	16	25	19	110	322 (100)

(5)Lack of human resources

Regarding the lacking human resources, the predominant response for the manufacturer was “Engineers” (53 percent), followed by “Workers” (40 percent), “Managers” (37 percent).

The predominant response for the non-manufacturer was “Managers” (45 percent), followed by “Administrative/ sales staffs” (30 percent), “Engineers” (28 percent). (Table 12-5)

(Table 12-5) Measures to address lack of human resources (check all that apply)

Unit : No. of firms and (%)

	Industry	Workers	Administrative /Sales staffs	Engineers	Managers	Sufficient Hunman Resources	Others	No. of firms
Manufacturer	Food	6 (43)	3 (21)	5 (36)	4 (29)	3 (21)	1 (7)	14
	Textile	9 (64)	4 (29)	7 (50)	5 (36)	1 (7)	0 (0)	14
	Chemical	13 (42)	3 (10)	13 (42)	14 (45)	4 (13)	1 (3)	31
	Steel/Non-ferrous metal	9 (32)	4 (14)	13 (46)	8 (29)	10 (36)	0 (0)	28
	General machinery	4 (33)	1 (8)	11 (92)	4 (33)	0 (0)	0 (0)	12
	Electric/Electronics machinery	18 (42)	7 (16)	24 (56)	17 (40)	11 (26)	0 (0)	43
	Transportation machinery	14 (35)	6 (15)	21 (53)	15 (38)	7 (18)	1 (3)	40
	Others	18 (41)	10 (23)	25 (57)	17 (39)	4 (9)	2 (5)	44
	Manufacturing sector total	91 (40)	38 (17)	119 (53)	84 (37)	40 (18)	5 (2)	226
Non-manufacturer	Trading	1 (3)	13 (34)	5 (13)	19 (50)	8 (21)	2 (5)	38
	Retailer	0 (0)	5 (45)	2 (18)	8 (73)	0 (0)	3 (27)	11
	Finance/Insurance/Securities	1 (8)	4 (31)	2 (15)	7 (54)	3 (23)	0 (0)	13
	Construction/Civil engineering	8 (38)	4 (19)	18 (86)	12 (57)	1 (5)	0 (0)	21
	Transportation/Communication	5 (19)	9 (33)	4 (15)	8 (30)	5 (19)	9 (33)	27
	Others	3 (11)	6 (22)	8 (30)	7 (26)	11 (41)	0 (0)	27
	Non-Manufacturing sector total	18 (13)	41 (30)	39 (28)	61 (45)	28 (20)	14 (10)	137
Total		109 (30)	79 (22)	158 (44)	145 (40)	68 (19)	19 (5)	363

(6) Measures to address lack of human resources

As for the measures in response to lack of human resources, the predominant response was “Promotion of recruitment” (55 percent), followed by “Wage increase (including new employees)” (42 percent), “Enhancement of welfare package” (37 percent), “Improvement of investment efficiency” (27 percent). (Table 12-6)

(Table 12-6)Measures to address lack of human resources (check all that apply)

Unit: No. of firms and (%)

Rank		Manufacture									Non-manufacture							
		Food	Textile	Chemical	Steel /Non-ferrous metal	General machinery	Electric /Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/Insurance /Securities	Construction /Civil engineering	Transportation /Communication	Others	Non-Manufacturing sector total	Total
1	Active recruitment	8 (62)	6 (43)	13 (43)	15 (58)	6 (50)	22 (51)	22 (56)	26 (60)	118 (54)	16 (43)	9 (82)	8 (62)	14 (74)	14 (54)	14 (54)	75 (57)	193 (55)
2	Wage increase	8 (62)	8 (57)	13 (43)	9 (35)	7 (58)	16 (37)	15 (38)	16 (37)	92 (42)	13 (35)	4 (36)	2 (15)	12 (63)	13 (50)	12 (46)	56 (42)	148 (42)
3	Enhancement of welfare package	4 (31)	6 (43)	12 (40)	11 (42)	2 (17)	15 (35)	16 (41)	24 (56)	90 (41)	13 (35)	6 (55)	3 (23)	7 (37)	9 (35)	2 (8)	40 (30)	130 (37)
4	Investment to improve efficiency	3 (23)	5 (36)	10 (33)	8 (31)	4 (33)	20 (47)	18 (46)	16 (37)	84 (38)	2 (5)	2 (18)	2 (15)	1 (5)	3 (12)	0 (0)	10 (8)	94 (27)
5	Nothing in particular	2 (15)	1 (7)	6 (20)	2 (8)	1 (8)	7 (16)	3 (8)	1 (2)	23 (10)	8 (22)	0 (0)	3 (23)	1 (5)	3 (12)	5 (19)	20 (15)	43 (12)
6	Utilization of foreign employees	3 (23)	0 (0)	1 (3)	1 (4)	0 (0)	6 (14)	3 (8)	2 (5)	16 (7)	1 (3)	0 (0)	0 (0)	3 (16)	1 (4)	1 (4)	6 (5)	22 (6)
7	Consider relocation (outside Thailand)	0 (0)	0 (0)	1 (3)	0 (0)	0 (0)	2 (5)	2 (5)	4 (9)	9 (4)	1 (3)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)	10 (3)
8	Consider relocation (within Thailand)	0 (0)	0 (0)	1 (3)	0 (0)	1 (8)	0 (0)	0 (0)	0 (0)	2 (1)	0 (0)	0 (0)	0 (0)	0 (0)	1 (4)	0 (0)	1 (1)	3 (1)
-	Others	1 (8)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	2 (5)	4 (2)	1 (3)	1 (9)	0 (0)	0 (0)	2 (8)	0 (0)	4 (3)	8 (2)
	Total	29	26	57	46	21	88	80	91	438	55	22	18	38	46	34	213	651
	No. of firms	13	14	30	26	12	43	39	43	220	37	11	13	19	26	26	132	352 (100)

13. EFFECTS OF THE ASEAN ECONOMIC COMMUNITY (AEC)

(1) Expectation for the implementation items of the AEC

As for the expect of the AEC, the predominant response was “Mutual duty exemption among CLMV (Cambodia, Laos, Myanmar and Vietnam)” (46 percent), followed by“ Simplified customs clearance at border” (37 percent) and “Free movement of skilled labor” (31 percent), “Infrastructure development in CLMV” (23 percent).

The percentage of the firms responding “Relaxation of capital control in the service sector (up to70%)” is high (37 percent) and“ Further deregulation of capital transfer”(27 percent). (Table 13-1)

(Table 13-1) Expectation for the implementation items of the AEC (check all that apply)

Unit: No. of firms and (%)

Rank		Manufacture									Non-manufacture								Total
		Food	Textile	Chemical	Steel /Non-ferrous metal	General machinery	Electric /Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/Insurance /Securities	Construction /Civil engineering	Transportation /Communication	Others	Non-Manufacturing sector total	
1	Mutual duty exemption among CLMV	8 (62)	8 (57)	10 (34)	9 (32)	7 (64)	20 (54)	17 (52)	21 (49)	100 (48)	25 (66)	2 (22)	0 (0)	9 (45)	13 (50)	7 (29)	56 (43)	156 (46)
2	Simplified customs clearance at border	5 (38)	5 (36)	16 (55)	10 (36)	3 (27)	15 (41)	12 (36)	17 (40)	83 (40)	11 (29)	4 (44)	1 (7)	8 (40)	12 (46)	5 (21)	41 (31)	124 (37)
3	Free movement of skilled labor	3 (23)	7 (50)	7 (24)	12 (43)	3 (27)	20 (54)	11 (33)	17 (40)	80 (38)	6 (16)	1 (11)	0 (0)	9 (45)	8 (31)	2 (8)	26 (20)	106 (31)
4	Infrastructure development in CLMV	2 (15)	3 (21)	7 (24)	5 (18)	3 (27)	11 (30)	4 (12)	10 (23)	45 (22)	10 (26)	3 (33)	2 (14)	9 (45)	6 (23)	4 (17)	34 (26)	79 (23)
5	Further deregulation of capital transfer	3 (23)	1 (7)	6 (21)	3 (11)	4 (36)	6 (16)	5 (15)	3 (7)	31 (15)	8 (21)	1 (11)	6 (43)	7 (35)	3 (12)	10 (42)	35 (27)	66 (19)
6	Deregulation of investment in manufacturing, mining, agriculture and foresty industries	2 (15)	5 (36)	7 (24)	4 (14)	4 (36)	13 (35)	7 (21)	8 (19)	50 (24)	3 (8)	0 (0)	2 (14)	0 (0)	0 (0)	4 (17)	9 (7)	59 (17)
7	Relaxation of capital control in the service sector (up to 70%)	0 (0)	1 (7)	0 (0)	1 (4)	1 (9)	3 (8)	2 (6)	2 (5)	10 (5)	14 (37)	3 (33)	6 (43)	6 (30)	11 (42)	8 (33)	48 (37)	58 (17)
8	Improvement of intellectual property rights-related system	3 (23)	1 (7)	3 (10)	2 (7)	0 (0)	3 (8)	3 (9)	2 (5)	17 (8)	2 (5)	0 (0)	0 (0)	4 (20)	0 (0)	6 (25)	12 (9)	29 (9)
9	Harmonized policy within the region (e.g. fair competition, consumer protection)	1 (8)	0 (0)	6 (21)	2 (7)	0 (0)	1 (3)	3 (9)	3 (7)	16 (8)	5 (13)	1 (11)	2 (14)	0 (0)	1 (4)	3 (13)	12 (9)	28 (8)
-	Others	0 (0)	0 (0)	1 (3)	3 (11)	1 (9)	0 (0)	0 (0)	1 (2)	6 (3)	1 (3)	0 (0)	2 (14)	0 (0)	2 (8)	1 (4)	6 (5)	12 (4)
	Total	27	31	63	51	26	92	64	84	438	85	15	21	52	56	50	279	717
	No. of firms	13	14	29	28	11	37	33	43	208	38	9	14	20	26	24	131	339 (100)

(2)Effects of the AEC in 2015

As for the effects of AEC to your business, “Increased competition with other countries” (36 percent) is high (36 percent), followed by “Increased export” (29 percent), “No effect in particular” (27 percent), and “Increased competition within Thailand” (19 percent). (Table 13-2)

(Table 13-2)Effects of the AEC in 2015(check all that apply)

Unit: No. of firms and (%)

Rank		Manufacture									Non-manufacture							
		Food	Textile	Chemical	Steel /Non-ferrous metal	General machinery	Electric /Electronics machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailer	Finance/Insurance /Securities	Construction /Civil engineering	Transportation /Communication	Others	Non-Manufacturing sector total	Total
1	Increased competition with other countries	5 (36)	6 (43)	10 (33)	15 (54)	7 (58)	19 (45)	17 (44)	15 (34)	94 (42)	18 (47)	2 (20)	1 (8)	2 (10)	7 (27)	5 (19)	35 (26)	129 (36)
2	Increased export	5 (36)	7 (50)	13 (43)	4 (14)	4 (33)	14 (33)	13 (33)	13 (30)	73 (33)	14 (37)	2 (20)	0 (0)	3 (14)	9 (35)	3 (12)	31 (23)	104 (29)
3	No effect in particular	4 (29)	1 (7)	8 (27)	7 (25)	0 (0)	10 (24)	6 (15)	14 (32)	50 (22)	7 (18)	4 (40)	9 (69)	7 (33)	7 (27)	14 (54)	48 (36)	98 (27)
4	Increased competition within Thailand	3 (21)	3 (21)	6 (20)	4 (14)	2 (17)	7 (17)	13 (33)	7 (16)	45 (20)	5 (13)	3 (30)	2 (15)	5 (24)	4 (15)	5 (19)	24 (18)	69 (19)
5	Restructing of production and sales bases	3 (21)	1 (7)	5 (17)	4 (14)	6 (50)	13 (31)	11 (28)	8 (18)	51 (23)	7 (18)	1 (10)	0 (0)	3 (14)	3 (12)	1 (4)	15 (11)	66 (18)
6	Relocation of part of labor-intensive business	0 (0)	3 (21)	0 (0)	3 (11)	1 (8)	4 (10)	2 (5)	10 (23)	23 (10)	2 (5)	1 (10)	0 (0)	1 (5)	2 (8)	1 (4)	7 (5)	30 (8)
-	Others	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	0 (0)	1 (0)	0 (0)	0 (0)	1 (8)	2 (10)	1 (4)	1 (4)	5 (4)	6 (2)
	Total	20	21	42	37	20	67	63	67	337	53	13	13	23	33	30	165	502
	No. of firms	14	14	30	28	12	42	39	44	223	38	10	13	21	26	26	134	357 (100)

(3)Possible new production bases following the AEC(check all that apply)

As for the possible new production bases following the AEC, “No changes” is high (49 percent), followed by “Myanmar” (29 percent) and “Indonesia” (21 percent). (Table 13-3)

(Table 13-3)**Possible new production bases following the AEC (check all that apply)**

Unit: No. of firms and (%)

Industry	No change	Myanmar	Indonesia	Vietnam	Cambodia	Thailand	Laos	Malaysia	Philippines	Singapore	Brunei	Total	No. of firms
Food	8 (67)	0 (0)	3 (25)	3 (25)	0 (0)	1 (8)	0 (0)	2 (17)	0 (0)	0 (0)	0 (0)	17	12
Textile	4 (29)	7 (50)	1 (7)	2 (14)	5 (36)	1 (7)	2 (14)	1 (7)	0 (0)	0 (0)	0 (0)	23	14
Chemical	14 (47)	5 (17)	7 (23)	8 (27)	0 (0)	3 (10)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	37	30
Steel/Non-ferrous metal	15 (52)	7 (24)	7 (24)	2 (7)	1 (3)	3 (10)	0 (0)	1 (3)	0 (0)	0 (0)	0 (0)	36	29
General machinery	7 (58)	2 (17)	2 (17)	2 (17)	0 (0)	1 (8)	0 (0)	1 (8)	0 (0)	1 (8)	0 (0)	16	12
Electric/Electronics machinery	17 (40)	21 (50)	11 (26)	3 (7)	3 (7)	2 (5)	2 (5)	1 (2)	0 (0)	0 (0)	0 (0)	60	42
Transportation machinery	16 (41)	10 (26)	13 (33)	6 (15)	0 (0)	2 (5)	2 (5)	0 (0)	0 (0)	0 (0)	0 (0)	49	39
Others	27 (61)	12 (27)	2 (5)	7 (16)	6 (14)	0 (0)	4 (9)	1 (2)	2 (5)	0 (0)	0 (0)	61	44
Manufacture	108 (49)	64 (29)	46 (21)	33 (15)	15 (7)	13 (6)	10 (5)	7 (3)	2 (1)	1 (0)	0 (0)	299	222
Ranking	1	2	3	4	5	6	7	8	9	10	11		

(4) Possible new market locations following the AEC

As for the possible new market locations following the AEC, “No changes” is high (46 percent), followed by “Myanmar” (32 percent) and “Indonesia” (21 percent). In the non-manufacturing sector, the percentage of the firms responding “Myanmar” is high (46 percent). (Table 13-4)

(Table 13-4)Possible new market locations following the AEC (check all that apply)

Unit: No. of firms and (%)

	Industry	No change	Myanmar	Indonesia	Vietnam	Cambodia	Laos	Malaysia	Thailand	Philippines	Singapore	Brunei	Total	No. of firms
Manufacturer	Food	7 (54)	2 (15)	4 (31)	2 (15)	0 (0)	1 (8)	0 (0)	1 (8)	1 (8)	2 (15)	0 (0)	20	13
	Textile	4 (31)	3 (23)	4 (31)	2 (15)	2 (15)	0 (0)	2 (15)	0 (0)	1 (8)	2 (15)	0 (0)	20	13
	Chemical	13 (43)	6 (20)	8 (27)	7 (23)	1 (3)	2 (7)	2 (7)	0 (0)	2 (7)	1 (3)	0 (0)	42	30
	Steel/Non-ferrous metal	15 (56)	6 (22)	6 (22)	3 (11)	1 (4)	1 (4)	1 (4)	2 (7)	0 (0)	0 (0)	0 (0)	35	27
	General machinery	5 (42)	4 (33)	3 (25)	4 (33)	1 (8)	1 (8)	0 (0)	1 (8)	0 (0)	1 (8)	0 (0)	20	12
	Electric/Electronics machinery	16 (38)	15 (36)	13 (31)	4 (10)	9 (21)	7 (17)	3 (7)	2 (5)	1 (2)	1 (2)	0 (0)	71	42
	Transportation machinery	21 (54)	7 (18)	12 (31)	3 (8)	2 (5)	2 (5)	3 (8)	2 (5)	1 (3)	1 (3)	0 (0)	54	39
	Others	26 (60)	8 (19)	5 (12)	5 (12)	3 (7)	0 (0)	4 (9)	1 (2)	1 (2)	1 (2)	1 (2)	55	43
	Manufacturing sector total	107 (49)	51 (23)	55 (25)	30 (14)	19 (9)	14 (6)	15 (7)	9 (4)	7 (3)	9 (4)	1 (0)	317	219
Non-Manufacturer	Trading	11 (31)	18 (50)	8 (22)	12 (33)	9 (25)	6 (17)	1 (3)	3 (8)	2 (6)	0 (0)	0 (0)	70	36
	Retailer	4 (44)	3 (33)	1 (11)	0 (0)	1 (11)	1 (11)	0 (0)	1 (11)	0 (0)	0 (0)	0 (0)	11	9
	Finance/Insurance/Securities	8 (67)	3 (25)	0 (0)	2 (17)	3 (25)	1 (8)	1 (8)	0 (0)	1 (8)	0 (0)	0 (0)	19	12
	Construction/Civil Engineering	5 (25)	14 (70)	3 (15)	4 (20)	3 (15)	4 (20)	1 (5)	2 (10)	0 (0)	0 (0)	0 (0)	36	20
	Transportation/Communication	11 (46)	12 (50)	1 (4)	2 (8)	9 (38)	3 (13)	0 (0)	0 (0)	1 (4)	1 (4)	1 (4)	41	24
	Others	13 (50)	9 (35)	3 (12)	3 (12)	5 (19)	3 (12)	2 (8)	0 (0)	1 (4)	2 (8)	0 (0)	41	26
	Non-Manufacturing sectro total	52 (41)	59 (46)	16 (13)	23 (18)	30 (24)	18 (14)	5 (4)	6 (5)	5 (4)	3 (2)	1 (1)	218	127
Total		159 (46)	110 (32)	71 (21)	53 (15)	49 (14)	32 (9)	20 (6)	15 (4)	12 (3)	12 (3)	2 (1)	535	346
No. of firms		1	2	3	4	5	6	7	8	9	9	11		

(5) Export/import countries where currently using FTAs/EPAs

As for the currently using FTAs /EPAs for exporting, “ASEAN” is high (34 percent), followed by “Japan” (26 percent), and “China” (13 percent). (Table 13-5-1)

Regarding the percentage of importing countries, “Japan” is high (39 percent), followed by “ASEAN” (26 percent), “China” (18 percent). (Table 13-5-2)

(Table 13-5-1)Export countries where currently using FTAs/EPAs (check all that apply)

Unit: No. of firms and (%)

	Industry	ASEAN	Japan	China	India	Australia	South Korea	New Zealand	Peru	Plan to use	No plan to use	Total	No. of firms
Manufacturer	Food	2 (17)	6 (50)	0 (0)	0 (0)	1 (8)	0 (0)	1 (8)	0 (0)	1 (8)	4 (33)	15	12
	Textile	10 (71)	12 (86)	8 (57)	1 (7)	1 (7)	3 (21)	0 (0)	0 (0)	0 (0)	1 (7)	36	14
	Chemical	17 (61)	8 (29)	8 (29)	6 (21)	4 (14)	1 (4)	0 (0)	0 (0)	3 (11)	4 (14)	51	28
	Steel/Non-ferrous metal	3 (15)	0 (0)	1 (5)	0 (0)	1 (5)	0 (0)	0 (0)	0 (0)	4 (20)	12 (60)	21	20
	General machinery	2 (22)	1 (11)	0 (0)	3 (33)	0 (0)	1 (11)	0 (0)	0 (0)	2 (22)	2 (22)	11	9
	Electric/Electronics machinery	14 (38)	14 (38)	8 (22)	8 (22)	3 (8)	1 (3)	1 (3)	0 (0)	7 (19)	10 (27)	66	37
	Transportation machinery	17 (46)	11 (30)	4 (11)	6 (16)	4 (11)	0 (0)	1 (3)	1 (3)	2 (5)	12 (32)	58	37
	Others	16 (37)	15 (35)	6 (14)	4 (9)	3 (7)	6 (14)	0 (0)	0 (0)	3 (7)	16 (37)	69	43
	Manufacturing sector total	81 (41)	67 (34)	35 (18)	28 (14)	17 (9)	12 (6)	3 (2)	1 (1)	22 (11)	61 (31)	327	200
Non-Manufacturer	Trading	13 (43)	8 (27)	4 (13)	7 (23)	2 (7)	2 (7)	0 (0)	0 (0)	3 (10)	9 (30)	48	30
	Retailer	1 (20)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4 (80)	5	5
	Finance/Insurance/ Securities	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	10 (100)	10	10
	Construction/Civil Engineering	2 (13)	1 (7)	0 (0)	1 (7)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	12 (80)	16	15
	Transportation/ Communication	4 (17)	4 (17)	2 (9)	1 (4)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	16 (70)	27	23
	Others	2 (9)	0 (0)	0 (0)	1 (5)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	19 (86)	22	22
	Non-Manufacturing sectro total	22 (21)	13 (12)	6 (6)	10 (10)	2 (2)	2 (2)	0 (0)	0 (0)	3 (3)	70 (67)	128	105
Total		103 (34)	80 (26)	41 (13)	38 (12)	19 (6)	14 (5)	3 (1)	1 (0)	25 (8)	131 (43)	455	305
No. of firms		1	2	3	4	5	6	7	8	-	-		

(Table 13-5-2) Import countries where currently using FTAs/EPAs (check all that apply)

Unit: No. of firms and (%)

	Industry	Japan	ASEAN	China	South Korea	India	Australia	New Zealand	Peru	Plan to use	No plan to use	Total	No. of firms
Manufacturer	Food	5 (42)	1 (8)	1 (8)	0 (0)	0 (0)	3 (25)	1 (8)	0 (0)	2 (17)	3 (25)	16	12
	Textile	11 (79)	5 (36)	7 (50)	2 (14)	1 (7)	1 (7)	0 (0)	0 (0)	0 (0)	1 (7)	28	14
	Chemical	15 (52)	12 (41)	5 (17)	2 (7)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	4 (14)	39	29
	Steel/Non-ferrous metal	10 (37)	2 (7)	0 (0)	1 (4)	0 (0)	1 (4)	0 (0)	0 (0)	6 (22)	9 (33)	29	27
	General machinery	2 (20)	3 (30)	1 (10)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3 (30)	3 (30)	12	10
	Electric/Electronics machinery	17 (41)	12 (29)	14 (34)	2 (5)	1 (2)	0 (0)	0 (0)	0 (0)	6 (15)	12 (29)	64	41
	Transportation machinery	19 (51)	14 (38)	6 (16)	0 (0)	4 (11)	0 (0)	0 (0)	0 (0)	3 (8)	10 (27)	56	37
	Others	18 (43)	11 (26)	8 (19)	2 (5)	2 (5)	1 (2)	0 (0)	0 (0)	3 (7)	16 (38)	61	42
	Manufacturing sector total	97 (46)	60 (28)	42 (20)	9 (4)	8 (4)	6 (3)	1 (0)	0 (0)	24 (11)	58 (27)	305	212
Non-Manufacturer	Trading	17 (47)	18 (50)	9 (25)	5 (14)	4 (11)	2 (6)	0 (0)	0 (0)	1 (3)	7 (19)	63	36
	Retailer	4 (44)	1 (11)	2 (22)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4 (44)	11	9
	Finance/Insurance/ Securities	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	10 (100)	10	10
	Construction/Civil Engineering	5 (28)	4 (22)	1 (6)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	10 (56)	21	18
	Transportation/ Communication	4 (17)	2 (9)	4 (17)	2 (9)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	17 (74)	29	23
	Others	1 (5)	2 (9)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	18 (82)	22	22
	Non-Manufacturing sectro total	31 (26)	27 (23)	16 (14)	7 (6)	4 (3)	2 (2)	0 (0)	0 (0)	3 (3)	66 (56)	156	118
Total		128 (39)	87 (26)	58 (18)	16 (5)	12 (4)	8 (2)	1 (0)	0 (0)	27 (8)	124 (38)	461	330
No. of firms		1	2	3	4	5	6	7	8	-	-		

(6) FTAs currently negotiated by the Thai government

As for the FTAs currently negotiated by the Thai government, “Regional Comprehensive Economic Partnership (RCEP)” is high (27 percent), followed by “TPP” (17 percent), and “EU” (13 percent). (Table 13-6)

(Table 13-6) FTAs currently megotiated by the Thai government

Unit : No. of firms and (%)

	Industry	RCEP	TPP	EU	EFTA	Russia	Mercosur	GCC	BIMSTEC	Chile	Nothing in particular	Total	No. of firms
Manufacturer	Food	1 (8)	2 (15)	4 (31)	2 (15)	0 (0)	1 (8)	0 (0)	0 (0)	0 (0)	6 (46)	16	13
	Textile	4 (29)	3 (21)	8 (57)	4 (29)	3 (21)	0 (0)	0 (0)	0 (0)	0 (0)	1 (7)	23	14
	Chemical	12 (41)	6 (21)	6 (21)	5 (17)	2 (7)	1 (3)	1 (3)	2 (7)	0 (0)	10 (34)	45	29
	Steel/Non-ferrous metal	5 (20)	5 (20)	1 (4)	1 (4)	0 (0)	1 (4)	0 (0)	0 (0)	0 (0)	16 (64)	29	25
	General machinery	5 (56)	1 (11)	0 (0)	1 (11)	0 (0)	1 (11)	0 (0)	0 (0)	0 (0)	3 (33)	11	9
	Electric/Electronics machinery	12 (29)	11 (27)	10 (24)	7 (17)	5 (12)	4 (10)	4 (10)	1 (2)	1 (2)	16 (39)	71	41
	Transportation machinery	13 (35)	9 (24)	7 (19)	3 (8)	3 (8)	4 (11)	3 (8)	1 (3)	1 (3)	13 (35)	57	37
	Others	9 (21)	4 (9)	5 (12)	7 (16)	4 (9)	2 (5)	0 (0)	0 (0)	0 (0)	23 (53)	54	43
	Manufacturing sector total	61 (29)	41 (19)	41 (19)	30 (14)	17 (8)	14 (7)	8 (4)	4 (2)	2 (1)	88 (42)	306	211
Non-Manufacturer	Trading	14 (36)	11 (28)	1 (3)	1 (3)	1 (3)	1 (3)	1 (3)	1 (3)	0 (0)	14 (36)	45	39
	Retailer	0 (0)	2 (25)	1 (13)	0 (0)	0 (0)	0 (0)	1 (13)	0 (0)	0 (0)	4 (50)	8	8
	Finance/Insurance/Securities	1 (9)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	10 (91)	11	11
	Construction/Civil Engineering	3 (16)	3 (16)	2 (11)	0 (0)	0 (0)	1 (5)	0 (0)	1 (5)	0 (0)	11 (58)	21	19
	Transportation/Communication	7 (29)	0 (0)	0 (0)	1 (4)	1 (4)	2 (8)	0 (0)	0 (0)	0 (0)	16 (67)	27	24
	Others	3 (13)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (4)	0 (0)	0 (0)	20 (87)	24	23
	Non-Manufacturing sectro total	28 (23)	16 (13)	4 (3)	2 (2)	2 (2)	4 (3)	3 (2)	2 (2)	0 (0)	75 (60)	136	124
Total		89 (27)	57 (17)	45 (13)	32 (10)	19 (6)	18 (5)	11 (3)	6 (2)	2 (1)	163 (49)	442	335
No. of firms		1	2	3	4	5	6	7	8	9	-		

(Note) RCEP (Regional Comprehensive Economic Partnership) 、TPP (Trans-Pacific Partnership)、EFTA (European Free Trade Area)、Mercosur (Mercado Comun del Sur) 、GCC (Gulf Cooperation Council)、BIMSTEC (Bengal Initiatives for Multi-Sectoral and Economic Cooperation)