

Survey of Business Sentiment on Japanese Corporations in Thailand for the 1st half of 2016

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A Survey of Business Sentiment of Japanese Corporations in Thailand for the 1st half of 2016

JCC Economic Survey Team

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Survey Period

Questionnaire request date: 23 May, 2016

Questionnaire response deadline: 15 June, 2016

Questionnaire response

This questionnaire was distributed to
1,705 JCC member firms.
(Eleven governmental organizations were excluded).

No. of firms responding to this questionnaire
459 firms

The response percentage
26.9%

Note

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

No. of firms		
Industry		No.
Manufacturing	Food	9
	Textiles	12
	Chemicals	44
	Steel/Non-ferrous metal	26
	General machinery	22
	Electrical/ electronic machinery	47
	Transportation machinery	60
	Others	35
	Manufacturing sector total	255
Non-manufacturing	Trading	64
	Retailing	9
	Finance/Insurance/Securities	17
	Construction/Civil engineering	34
	Transportation/Communication	32
	Others	48
	Non-manufacturing sector total	204
Total		459

Report about the response to this questionnaire

Please refer to the following pages.

1. BUSINESS SENTIMENT

(1) Summary

Business sentiments in the second half of 2015, compared to the first half of 2015, the range of deterioration slightly decreased (-9)→(-4). Business sentiments in the first half of 2016 turned around (-4)→(7) and with expectation for recovery in consumption thanks to economic measures, the range of improvement is expected to expand significantly in the second half of 2016 (7)→(17) (*Table 1-1*).

(Table 1-1) Business Sentiment

Unit : %

	Past Surveys							Previous Survey			This Survey		
	Results							Results	Forecast		Results	Forecast	
	11/2	12/1	12/2	13/1	13/2	14/1	14/2	15/1	15/2	16/1	15/2	16/1	16/2
Improving	21	76	60	46	35	30	32	28	29	33	30	35	35
No change	17	11	21	28	28	20	35	35	31	42	36	38	47
Deteriorating	62	14	19	25	37	50	33	37	40	25	34	28	18
(Ref) DI	▲ 41	62	41	21	▲ 2	▲ 20	▲ 1	▲ 9	▲ 11	8	▲ 4	7	17

*(Note) 1. DI = (Improving) - (Deteriorating)

2. As for 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 the business performance of many firms is improving, but if below the neutral level, it signifies a deterioration.

(2) The second half of 2015 (July - December)

The percentage of firms reporting that business sentiment was “improving” increased by 2 points to 30% from the previous term (28%), whereas those reporting “deteriorating” decreased by 3 points to 34% from the previous term (37%). As a result, the Diffusion Index (DI), which is the balance between “improving” and “deteriorating”, was calculated as -4, 5 points higher than the previous term (-9) (*Table 1-1*).

In the manufacturing sector, the DI decreased in the general machinery, steel/non-ferrous metal industries etc. whereas it increased in many industries such as chemical, electric/ electronic machinery etc. As a result, the overall DI in the manufacturing sector increased by 11 points to +1 from the previous term (-10). For the non-manufacturing sector, it increased in trading whereas it decreased in a number of industries such as finance/ insurance/ securities etc. and the overall DI in the non-manufacturing sector decreased by 3 points to -10 from the previous term (-7) (*Table 1-2*).

(3) The first half of 2016 (January - June) - Forecast

The percentage of firms reporting that business performance was “improving” increased by 5 point to 35% from the previous term (30%), whereas the percentage of firms reporting “deteriorating” decreased by 6 point to 28% from the previous term (34%). As a result, the overall DI is expected to increase by 11 points to +7 from the previous term (-4) (*Table 1-1*).

In the manufacturing sector, the DI decreased in textile etc. whereas it increased in a number of industries such as food and chemical. As a result, the overall DI in the manufacturing sector is expected to increase by 5 points to +6 from the previous term (+1). For the non-manufacturing sector, it increased in almost industries and the overall DI in the non-manufacturing sector is expected to increase by 18 points to +8 from the previous term (-10) (*Table 1-2*).

(4) The second half of 2016 (July - December) - Forecast

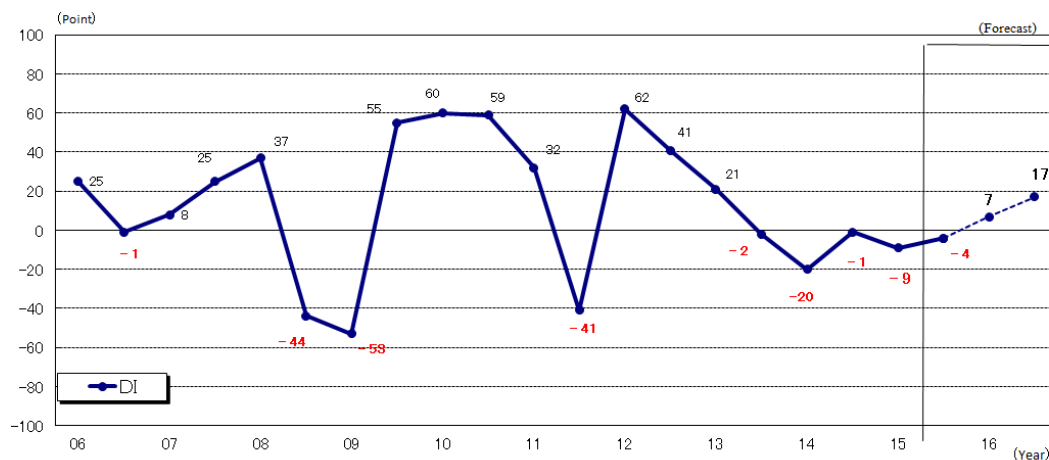
The percentage of firms reporting that business performance was “improving” was 35%, the same figure as that of the previous term, resulting in no change, whereas the percentage of firms reporting “deteriorating” decreased by 10 points to 18% from the previous term (28%). As a result, the overall DI is expected to increase by 10 points to +17 from the previous term (+7) (Table 1-1).

In the manufacturing sector, the DI is expected to decrease in steel/ non-ferrous metal etc. whereas it is expected to increase in a number of industries such as general machinery and transportation machinery etc. and the overall DI is expected to increase by 5 points to +11 from the previous term (+6). For the non-manufacturing sector, it is expected to increase in all industries excluding "others", and the overall DI is expected to increase by 14 points to + 22 from the previous period (+8) (Table 1-2).

(Table 1-2) DI by the Industry (“Improving” – “deteriorating”)

Industry		Past Surveys								Survey this time		
		Result						Forecast		Result	Forecast	
		12H2	13H1	13H2	14H1	14H2	15H1	15H2	16H1		16H1	16H2
Manufacture	Food	0	-37	38	40	-50	38	50	75	23	50	75
	Textile	31	33	37	47	16	-40	0	13	41	-8	8
	Chemical	34	22	-3	-15	13	2	0	4	15	39	31
	Steel/Non-ferrous metal	35	52	-14	-13	-25	-9	-3	7	-15	7	-8
	General machinery	0	0	-23	-24	33	-31	-31	-19	-37	-23	9
	Electric/Electronics machinery	13	5	13	9	23	4	-23	-8	11	0	13
	Transportation machinery	74	9	-51	-62	-23	-18	-12	11	-16	-5	-2
	Others	26	18	13	-19	-5	-12	-7	10	11	0	8
	Manufacturing sector total	32	16	-7	-17	-1	-10	-10	4	1	6	11
Non-manufacture	Trading	61	30	9	-16	2	-8	-5	21	6	14	30
	Retailer	64	10	23	-42	11	25	0	0	-11	0	45
	Finance/Insurance/Securities	73	61	-7	-24	-20	-6	-10	17	-25	0	26
	Construction/Civil engineering	65	20	16	-56	-15	-54	-53	-20	-50	-26	-3
	Transportation/Communication	40	13	-21	-35	-10	-18	-7	11	-22	34	40
	Others	31	37	13	-7	7	19	1	27	11	13	10
	Non-Manufacturing sector total	54	29	4	-26	-2	-7	-10	14	-10	8	22
Total		41	21	-2	-20	-1	-9	-11	8	-4	7	17

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



*(Note) Diffusion Index (DI) = Improving –Deteriorating (Compared with the previous term)

2. SALES

The percentage of firms reporting an “increase” in their total sales result in 2015 fell by 5 points to 45% from the previous year (50%). The percentage of firms reporting “more than a 20% increase” in their total sales remained unchanged at 13% from the previous year (13%) (Tables 2-1, 2-2).

Regarding sales forecasts for 2016, the number of firms anticipating an “increase” in their total sales increased by 9 points to 54% from the previous period (45%), and the percentage of firms anticipating a “more than 20% increase” in their total sales decreased by 2 point, from 13% in the previous period to 11% (Tables 2-1, 2-3).

(Table 2-1) Change in total sales

	Past surveys							Previous survey		This survey	
	Results							Result	Forecast	Forecast	
	08	09	10	11	12	13	14	14	15	15	16
Year											
Sales increase	56	33	82	54	73	52	50	50	56	45	54
Sales increase more than 20%	14	6	46	13	34	17	13	13	12	13	11

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

(Table 2-2) Sales result for 2015

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	7 (78)	1 (11)	3 (33)	3 (33)	1 (11)	1 (11)	1 (11)	0 (0)	0 (0)
	Textile	2 (17)	0 (0)	1 (8)	1 (8)	4 (33)	6 (50)	4 (33)	2 (17)	0 (0)
	Chemical	19 (42)	6 (13)	4 (9)	9 (20)	4 (9)	22 (49)	13 (29)	6 (13)	3 (7)
	Steel/Non-ferrous metal	11 (42)	5 (19)	3 (12)	3 (12)	5 (19)	10 (38)	5 (19)	3 (12)	2 (8)
	General machinery	10 (43)	4 (17)	1 (4)	5 (22)	2 (9)	11 (48)	3 (13)	3 (13)	5 (22)
	Electric/Electronics machinery	21 (45)	5 (11)	7 (15)	9 (19)	14 (30)	12 (26)	7 (15)	4 (9)	1 (2)
	Transportation machinery	23 (39)	5 (8)	6 (10)	12 (20)	9 (15)	27 (46)	15 (25)	8 (14)	4 (7)
	Others	22 (59)	8 (22)	3 (8)	11 (30)	4 (11)	11 (30)	5 (14)	4 (11)	2 (5)
	Manufacturing sector total	115 (45)	34 (13)	28 (11)	53 (21)	43 (17)	100 (39)	53 (21)	30 (12)	17 (7)
Non-manufacture	Trading	30 (48)	10 (16)	7 (11)	13 (21)	16 (26)	16 (26)	7 (11)	7 (11)	2 (3)
	Retailer	5 (56)	1 (11)	0 (0)	4 (44)	2 (22)	2 (22)	1 (11)	1 (11)	0 (0)
	Finance/Insurance/Securities	9 (64)	0 (0)	4 (29)	5 (36)	3 (21)	2 (14)	2 (14)	0 (0)	0 (0)
	Construction/Civil engineering	7 (21)	2 (6)	4 (12)	1 (3)	5 (15)	22 (65)	2 (6)	9 (26)	11 (32)
	Transportation/Communication	14 (44)	3 (9)	5 (16)	6 (19)	7 (22)	11 (34)	8 (25)	3 (9)	0 (0)
	Others	24 (57)	9 (21)	6 (14)	9 (21)	11 (26)	7 (17)	4 (10)	2 (5)	1 (2)
	Non-Manufacturing sector total	89 (46)	25 (13)	26 (13)	38 (20)	44 (23)	60 (31)	24 (12)	22 (11)	14 (7)
Total		204 (45)	59 (13)	54 (12)	91 (20)	87 (19)	160 (35)	77 (17)	52 (12)	31 (7)

(Table 2-3) Sales forecast for 2016

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	7 (70)	1 (10)	3 (30)	3 (30)	1 (10)	2 (20)	1 (10)	1 (10)	0 (0)
	Textile	6 (50)	0 (0)	1 (8)	5 (42)	3 (25)	3 (25)	3 (25)	0 (0)	0 (0)
	Chemical	28 (64)	5 (11)	9 (20)	14 (32)	6 (14)	10 (23)	9 (20)	0 (0)	1 (2)
	Steel/Non-ferrous metal	12 (44)	3 (11)	4 (15)	5 (19)	7 (26)	8 (30)	4 (15)	2 (7)	2 (7)
	General machinery	12 (52)	4 (17)	3 (13)	5 (22)	4 (17)	7 (30)	0 (0)	5 (22)	2 (9)
	Electric/Electronics machinery	24 (51)	5 (11)	7 (15)	12 (26)	10 (21)	13 (28)	7 (15)	5 (11)	1 (2)
	Transportation machinery	26 (45)	5 (9)	5 (9)	16 (28)	7 (12)	25 (43)	16 (28)	7 (12)	2 (3)
	Others	19 (53)	3 (8)	4 (11)	12 (33)	7 (19)	10 (28)	3 (8)	6 (17)	1 (3)
Manufacturing sector total		134 (52)	26 (10)	36 (14)	72 (28)	45 (18)	78 (30)	43 (17)	26 (10)	9 (4)
Non-manufacture	Trading	37 (60)	8 (13)	13 (21)	16 (26)	19 (31)	6 (10)	5 (8)	1 (2)	0 (0)
	Retailer	6 (67)	2 (22)	1 (11)	3 (33)	2 (22)	1 (11)	0 (0)	1 (11)	0 (0)
	Finance/Insurance/Securities	8 (57)	0 (0)	3 (21)	5 (36)	5 (36)	1 (7)	1 (7)	0 (0)	0 (0)
	Construction/Civil engineering	13 (38)	3 (9)	6 (18)	4 (12)	7 (21)	14 (41)	3 (9)	4 (12)	7 (21)
	Transportation/Communication	21 (66)	3 (9)	10 (31)	8 (25)	6 (19)	5 (16)	4 (13)	1 (3)	0 (0)
	Others	25 (54)	8 (17)	9 (20)	8 (17)	14 (30)	7 (15)	3 (7)	3 (7)	1 (2)
Non-Manufacturing sector total		110 (56)	24 (12)	42 (21)	44 (22)	53 (27)	34 (17)	16 (8)	10 (5)	8 (4)
Total		244 (54)	50 (11)	78 (17)	116 (26)	98 (22)	112 (25)	59 (13)	36 (8)	17 (4)

3. PRE-TAX PROFIT/LOSS

Firms reporting a “Profit” in their 2015 pre-tax profit/loss results were 73%. Firms reporting an “increase” in their net profit (including the case that any loss will diminish, vanish, or achieve balance) accounted for 40%, whereas those reporting a “decrease” in their net profit accounted for 39 %. (Table 3-1).

The percentage of firms anticipating a “Profit” in their 2016 pre-tax profit/loss forecast was 76%. Firms anticipating an “increase” in their pre-tax profit were 40%, whereas those firms anticipating a “decrease” in their pre-tax profit were 33%. (Table 3-2).

(Table 3—1) Pre-tax profit/loss in 2015 (From the previous year)

Unit: No. of firms and (%)

Industry		Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease
Manufacture	Food	6 (67)	0 (0)	3 (33)	9	7 (78)	0 (0)	2 (22)
	Textile	11 (92)	0 (0)	1 (8)	12	7 (58)	1 (8)	4 (33)
	Chemical	34 (77)	0 (0)	10 (23)	44	27 (61)	5 (11)	12 (27)
	Steel/Non-ferrous metal	18 (69)	0 (0)	8 (31)	26	10 (38)	5 (19)	11 (42)
	General machinery	14 (64)	2 (9)	6 (27)	22	8 (36)	5 (23)	9 (41)
	Electric/Electronics machinery	41 (87)	1 (2)	5 (11)	47	23 (49)	12 (26)	12 (26)
	Transportation machinery	50 (85)	1 (2)	8 (14)	59	20 (34)	11 (19)	28 (47)
	Others	26 (74)	1 (3)	8 (23)	35	18 (51)	6 (17)	11 (31)
	Manufacturing sector total	200 (79)	5 (2)	49 (19)	254	120 (47)	45 (18)	89 (35)
Non-manufacture	Trading	46 (75)	3 (5)	12 (20)	61	21 (34)	9 (15)	31 (51)
	Retailer	4 (44)	0 (0)	5 (56)	9	0 (0)	3 (33)	6 (67)
	Finance/Insurance/Securities	10 (77)	2 (15)	1 (8)	13	7 (54)	4 (31)	2 (15)
	Construction/Civil engineering	19 (58)	3 (9)	11 (33)	33	6 (18)	5 (15)	22 (67)
	Transportation/Communication	19 (63)	4 (13)	7 (23)	30	10 (33)	8 (27)	12 (40)
	Others	27 (61)	5 (11)	12 (27)	44	14 (32)	17 (39)	13 (30)
	Non-Manufacturing sector total	125 (66)	17 (9)	48 (25)	190	58 (31)	46 (24)	86 (45)
Total		325 (73)	22 (5)	97 (22)	444	178 (40)	91 (20)	175 (39)

(Note) 1. Profit increase indicates either an expanding profit, turning to the black, diminishing loss, or moving up to the break-even point.

2. No change indicates either remaining at the same level as before regardless of in the black, the break-even point, or in the red.

3. Profit decrease indicates either a diminishing profit, falling into the red, expanding loss, or moving down to the break-even point.

(Table 3—2) Forecast for pre-tax profit/loss for 2016 (From previous year)

Unit: No. of firms and (%)

Industry		Profit	Balance	Loss	Total	Profit increase	No change	Profit decrease
Manufacture	Food	6 (67)	2 (22)	1 (11)	9	4 (44)	3 (33)	2 (22)
	Textile	11 (92)	1 (8)	0 (0)	12	3 (25)	5 (42)	4 (33)
	Chemical	37 (86)	2 (5)	4 (9)	43	24 (56)	8 (19)	11 (26)
	Steel/Non-ferrous metal	20 (77)	4 (15)	2 (8)	26	13 (50)	3 (12)	10 (38)
	General machinery	14 (64)	4 (18)	4 (18)	22	10 (45)	3 (14)	9 (41)
	Electric/Electronics machinery	37 (79)	5 (11)	5 (11)	47	14 (30)	14 (30)	19 (40)
	Transportation machinery	54 (93)	2 (3)	2 (3)	58	20 (34)	17 (29)	21 (36)
	Others	28 (80)	3 (9)	4 (11)	35	13 (37)	11 (31)	11 (31)
	Manufacturing sector total	207 (82)	23 (9)	22 (9)	252	101 (40)	64 (25)	87 (35)
Non-manufacture	Trading	54 (87)	1 (2)	7 (11)	62	29 (47)	17 (27)	16 (26)
	Retailer	4 (44)	2 (22)	3 (33)	9	5 (56)	1 (11)	3 (33)
	Finance/Insurance/Securities	12 (92)	1 (8)	0 (0)	13	4 (31)	6 (46)	3 (23)
	Construction/Civil engineering	17 (52)	8 (24)	8 (24)	33	10 (30)	7 (21)	16 (48)
	Transportation/Communication	18 (58)	7 (23)	6 (19)	31	11 (35)	13 (42)	7 (23)
	Others	29 (60)	7 (15)	12 (25)	48	18 (38)	15 (31)	15 (31)
	Non-Manufacturing sector total	134 (68)	26 (13)	36 (18)	196	77 (39)	59 (30)	60 (31)
Total		341 (76)	49 (11)	58 (13)	448	178 (40)	123 (27)	147 (33)

(Note) Same as Table 3—1.

4. CAPITAL INVESTMENT (MANUFACTURING SECTOR)

The amount of planned capital investment (in the manufacturing sector) in 2016 is expected to decrease by 12.1% from 2015 (The total number of responding firms was 250). The percentage of the firms anticipating an “Increase” in their capital investments in 2016 was 33% , 35% of the firms anticipate a “Decrease” (Table 4-1).

The predominant reason for capital investment was “replacement” in both 2015 and 2016. (Tables 4-2 and 4-3).

(Table 4-1)Planned capital investment for 2015 and 2016 (Manufacturing)

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

Industry	2015	2016		No. of firms				Total
	Amount	Amount	Increase	Increase	No change	Decrease	Undecided	
Food	417	832	99.5	5 (50)	3 (30)	1 (10)	1 (10)	10
Textile	1,178	2,705	129.6	8 (67)	3 (25)	1 (8)	0 (0)	12
Chemical	10,220	8,174	▲ 20.0	16 (37)	12 (28)	12 (28)	3 (7)	43
Steel/Non-ferrous metal	2,246	2,183	▲ 2.8	11 (44)	4 (16)	10 (40)	0 (0)	25
General machinery	728	953	30.9	5 (24)	8 (38)	5 (24)	3 (14)	21
Electric/Electronics machinery	20,589	16,158	▲ 21.5	16 (34)	13 (28)	15 (32)	3 (6)	47
Transportation machinery	18,663	16,348	▲ 12.4	13 (22)	13 (22)	31 (53)	1 (2)	58
Others	5,456	4,951	▲ 9.3	8 (24)	11 (32)	13 (38)	2 (6)	34
Manufacturing sector total	59,497	52,303	▲ 12.1	82 (33)	67 (27)	88 (35)	13 (5)	250

(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 of actual capital investment in 2015 (Check all that apply)

Unit: No. of firms and (%)

Industry	New	Expansion	Replacement	Streamlining	Others	Total	Response
Food	3 (38)	3 (38)	8 (100)	1 (13)	0 (0)	15	8
Textile	4 (33)	3 (25)	5 (42)	5 (42)	0 (0)	17	12
Chemical	14 (34)	12 (29)	24 (59)	15 (37)	1 (2)	66	41
Steel/Non-ferrous metal	10 (40)	4 (16)	14 (56)	5 (20)	2 (8)	35	25
General machinery	5 (25)	3 (15)	8 (40)	6 (30)	3 (15)	25	20
Electric/Electronics machinery	17 (39)	14 (32)	26 (59)	16 (36)	1 (2)	74	44
Transportation machinery	31 (54)	19 (33)	28 (49)	22 (39)	0 (0)	100	57
Others	11 (33)	15 (45)	16 (48)	7 (21)	0 (0)	49	33
Manufacturing sector total	95 (40)	73 (30)	129 (54)	77 (32)	7 (3)	381	240

(Table 4-3) Details of actual capital investment in 2016 (Check all that apply)

Unit: No. of firms and (%)

Industry	New	Expansion	Replacement	Streamlining	Others	Total	Response
Food	5 (56)	4 (44)	7 (78)	2 (22)	0 (0)	18	9
Textile	2 (18)	4 (36)	6 (55)	5 (45)	0 (0)	17	11
Chemical	15 (37)	12 (29)	25 (61)	14 (34)	2 (5)	68	41
Steel/Non-ferrous metal	8 (31)	4 (15)	12 (46)	13 (50)	0 (0)	37	26
General machinery	5 (24)	2 (10)	12 (57)	7 (33)	1 (5)	27	21
Electric/Electronics machinery	19 (43)	14 (32)	26 (59)	18 (41)	1 (2)	78	44
Transportation machinery	28 (48)	17 (29)	34 (59)	25 (43)	1 (2)	105	58
Others	7 (21)	16 (48)	18 (55)	6 (18)	0 (0)	47	33
Manufacturing sector total	89 (37)	73 (30)	140 (58)	90 (37)	5 (2)	397	243

5. EXPORT TREND

The percentage of firms reporting an “Increase” in their exports accounted for 30% in the first half of 2016 and 35% in the second half of 2016 and exceeded the “Decrease” in both terms. The percentage of firms reporting anticipating an “Increase” in their exports accounted for 39% in the full year of 2016 and exceeded the “Decrease” (16%) by 23 points. (Tables 5-1, 5-2, and 5-3)

(Table 5-1) Exports in 2016 (First half)

Unit: No. of firms and (%)

Industry	Increase				No change	Decrease				No. of firm
		More than 20%	10-20%	Less than 10%			Less than 10%	10-20%	More than 20%	
Food	5 (56)	0 (0)	1 (11)	4 (44)	2 (22)	2 (22)	2 (22)	0 (0)	0 (0)	9
Textile	7 (64)	2 (18)	1 (9)	4 (36)	4 (36)	0 (0)	0 (0)	0 (0)	0 (0)	11
Chemical	18 (41)	6 (14)	3 (7)	9 (20)	18 (41)	8 (18)	7 (16)	1 (2)	0 (0)	44
Steel/Non-ferrous metal	8 (32)	3 (12)	1 (4)	4 (16)	14 (56)	3 (12)	0 (0)	2 (8)	1 (4)	25
General machinery	3 (14)	0 (0)	2 (10)	1 (5)	14 (67)	4 (19)	2 (10)	1 (5)	1 (5)	21
Electric/Electronics machinery	16 (34)	2 (4)	6 (13)	8 (17)	22 (47)	9 (19)	4 (9)	4 (9)	1 (2)	47
Transportation machinery	16 (29)	1 (2)	6 (11)	9 (16)	23 (42)	16 (29)	7 (13)	8 (15)	1 (2)	55
Others	9 (26)	2 (6)	2 (6)	5 (15)	17 (50)	8 (24)	5 (15)	2 (6)	1 (3)	34
Manufacturing sector total	82 (33)	16 (7)	22 (9)	44 (18)	114 (46)	50 (20)	27 (11)	18 (7)	5 (2)	246
Trading	13 (22)	5 (9)	4 (7)	4 (7)	41 (71)	4 (7)	2 (3)	1 (2)	1 (2)	58
Retailer	0 (0)	0 (0)	0 (0)	0 (0)	4 (100)	0 (0)	0 (0)	0 (0)	0 (0)	4
Others	0 (0)	0 (0)	0 (0)	0 (0)	4 (100)	0 (0)	0 (0)	0 (0)	0 (0)	4
Non-Manufacturing sector total	14 (19)	6 (8)	4 (6)	4 (6)	54 (75)	4 (6)	2 (3)	1 (1)	1 (1)	72
Total	96 (30)	22 (7)	26 (8)	48 (15)	168 (53)	54 (17)	29 (9)	19 (6)	6 (2)	318

(Note) Year-to-Year Comparison

(Table 5-2) Exports in 2016 (Second half)

Unit: No. of firms and (%)

Industry	Increase				No change	Decrease				No. of firm
		More than 20%	10-20%	Less than 10%			Less than 10%	10-20%	More than 20%	
Food	7 (78)	2 (22)	1 (11)	4 (44)	2 (22)	0 (0)	0 (0)	0 (0)	0 (0)	9
Textile	4 (36)	0 (0)	0 (0)	4 (36)	5 (45)	2 (18)	1 (9)	1 (9)	0 (0)	11
Chemical	21 (49)	4 (9)	4 (9)	13 (30)	15 (35)	7 (16)	5 (12)	2 (5)	0 (0)	43
Steel/Non-ferrous metal	7 (28)	2 (8)	1 (4)	4 (16)	13 (52)	5 (20)	1 (4)	2 (8)	2 (8)	25
General machinery	7 (33)	0 (0)	3 (14)	4 (19)	12 (57)	2 (10)	1 (5)	1 (5)	0 (0)	21
Electric/Electronics machinery	16 (33)	4 (8)	6 (12)	6 (12)	25 (51)	8 (16)	3 (6)	3 (6)	2 (4)	49
Transportation machinery	17 (30)	2 (4)	3 (5)	12 (21)	25 (45)	14 (25)	7 (13)	5 (9)	2 (4)	56
Others	12 (36)	0 (0)	5 (15)	7 (21)	15 (45)	6 (18)	3 (9)	2 (6)	1 (3)	33
Manufacturing sector total	91 (37)	14 (6)	23 (9)	54 (22)	112 (45)	44 (18)	21 (9)	16 (6)	7 (3)	247
Trading	20 (33)	5 (8)	3 (5)	12 (20)	35 (58)	5 (8)	1 (2)	0 (0)	4 (7)	60
Retailer	1 (25)	0 (0)	1 (25)	0 (0)	3 (75)	0 (0)	0 (0)	0 (0)	0 (0)	4
Others	0 (0)	0 (0)	0 (0)	0 (0)	4 (100)	0 (0)	0 (0)	0 (0)	0 (0)	4
Non-Manufacturing sector total	22 (30)	5 (7)	5 (7)	12 (16)	47 (64)	5 (7)	1 (1)	0 (0)	4 (5)	74
Total	113 (35)	19 (6)	28 (9)	66 (21)	159 (50)	49 (15)	22 (7)	16 (5)	11 (3)	321

(Note) Year-to-Year Comparison

(Table 5-3) Exports in 2016 (Full year)

Unit: No. of firms and (%)

Industry	Increase				No change	Decrease				No. of firm
		More than 20%	10-20%	Less than 10%			Less than 10%	10-20%	More than 20%	
Food	7 (78)	1 (11)	2 (22)	4 (44)	2 (22)	0 (0)	0 (0)	0 (0)	0 (0)	9
Textile	7 (64)	0 (0)	2 (18)	5 (45)	2 (18)	2 (18)	2 (18)	0 (0)	0 (0)	11
Chemical	22 (52)	5 (12)	4 (10)	13 (31)	12 (29)	8 (19)	8 (19)	0 (0)	0 (0)	42
Steel/Non-ferrous metal	8 (33)	2 (8)	2 (8)	4 (17)	12 (50)	4 (17)	0 (0)	2 (8)	2 (8)	24
General machinery	6 (27)	0 (0)	4 (18)	2 (9)	14 (64)	2 (9)	1 (5)	1 (5)	0 (0)	22
Electric/Electronics machinery	16 (33)	3 (6)	6 (13)	7 (15)	21 (44)	11 (23)	6 (13)	3 (6)	2 (4)	48
Transportation machinery	20 (36)	1 (2)	6 (11)	13 (23)	22 (39)	14 (25)	6 (11)	7 (13)	1 (2)	56
Others	13 (39)	0 (0)	5 (15)	8 (24)	13 (39)	7 (21)	4 (12)	2 (6)	1 (3)	33
Manufacturing sector total	99 (40)	12 (5)	31 (13)	56 (23)	98 (40)	48 (20)	27 (11)	15 (6)	6 (2)	245
Trading	21 (36)	6 (10)	3 (5)	12 (21)	34 (59)	3 (5)	2 (3)	0 (0)	1 (2)	58
Retailer	2 (50)	0 (0)	0 (0)	2 (50)	2 (50)	0 (0)	0 (0)	0 (0)	0 (0)	4
Others	0 (0)	0 (0)	0 (0)	0 (0)	4 (100)	0 (0)	0 (0)	0 (0)	0 (0)	4
Non-Manufacturing sector total	24 (33)	7 (10)	3 (4)	14 (19)	45 (63)	3 (4)	2 (3)	0 (0)	1 (1)	72
Total	123 (39)	19 (6)	34 (11)	70 (22)	143 (45)	51 (16)	29 (9)	15 (5)	7 (2)	317

(Note) Year-to-Year Comparison

6. PROSPECTIVE FUTURE MARKETS

For the prospective future markets (check all that apply), the predominant response was “Vietnam” (39%) followed by “Indonesia” (32%), “India” (28%), “Myanmar” (25%), and “Cambodia” (16%) (Table 6)

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

Unit: No. of firms and (%)

The time before last time	Last time	This time		Manufacturing									Non-manufacturing					Grand total
				Food	Textiles	Chemicals	Steel/Non-ferrous me	General machinery	Electric/Electronic m	Transportation machi	Others	Manufacturing sector	Trading	Retailing	Construction/ Engineering	Others	Non-manufacturing se	
2	1	1	Vietnam	4 (50)	6 (43)	19 (44)	7 (29)	12 (50)	13 (25)	21 (36)	16 (47)	98 (38)	27 (39)	3 (43)	3 (100)	4 (36)	37 (41)	135 (39)
1	2	2	Indonesia	3 (38)	4 (29)	19 (44)	7 (29)	10 (42)	11 (22)	25 (42)	8 (24)	87 (34)	21 (30)	0 (0)	2 (67)	3 (27)	26 (29)	113 (32)
3	3	3	India	1 (13)	3 (21)	18 (42)	8 (33)	7 (29)	10 (20)	22 (37)	10 (29)	79 (31)	19 (27)	0 (0)	0 (0)	0 (0)	19 (21)	98 (28)
4	4	4	Myanmar	3 (38)	6 (43)	12 (28)	6 (25)	3 (13)	11 (22)	11 (19)	11 (32)	63 (25)	20 (29)	1 (14)	2 (67)	1 (9)	24 (26)	87 (25)
5	6	5	Cambodia	0 (0)	6 (43)	3 (7)	0 (0)	1 (4)	10 (20)	8 (14)	6 (18)	34 (13)	15 (21)	2 (29)	4 (133)	1 (9)	22 (24)	56 (16)
7	5	6	Japan	3 (38)	3 (21)	5 (12)	4 (17)	3 (13)	12 (24)	5 (8)	1 (3)	36 (14)	12 (17)	1 (14)	2 (67)	0 (0)	15 (16)	51 (15)
8	8	7	Malaysia	2 (25)	2 (14)	9 (21)	4 (17)	3 (13)	6 (12)	7 (12)	4 (12)	37 (14)	13 (19)	0 (0)	0 (0)	0 (0)	13 (14)	50 (14)
9	7	8	Philippines	2 (25)	1 (7)	7 (16)	3 (13)	3 (13)	5 (10)	12 (20)	2 (6)	35 (14)	4 (6)	1 (14)	1 (33)	3 (27)	9 (10)	44 (13)
6	9	9	Laos	0 (0)	4 (29)	6 (14)	1 (4)	1 (4)	6 (12)	4 (7)	3 (9)	25 (10)	11 (16)	1 (14)	4 (133)	0 (0)	16 (18)	41 (12)
11	9	10	USA	2 (25)	4 (29)	3 (7)	2 (8)	1 (4)	11 (22)	3 (5)	5 (15)	31 (12)	3 (4)	0 (0)	0 (0)	0 (0)	3 (3)	34 (10)
10	11	11	China	2 (25)	2 (14)	4 (9)	0 (0)	1 (4)	9 (18)	5 (8)	3 (9)	26 (10)	5 (7)	0 (0)	0 (0)	0 (0)	5 (5)	31 (9)
14	13	12	Europe	1 (13)	3 (21)	1 (2)	1 (4)	2 (8)	9 (18)	5 (8)	2 (6)	24 (9)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	24 (7)
12	13	13	Middle East	0 (0)	0 (0)	4 (9)	1 (4)	1 (4)	3 (6)	8 (14)	2 (6)	19 (7)	0 (0)	1 (14)	0 (0)	0 (0)	1 (1)	20 (6)
13	12	14	Latin America	0 (0)	0 (0)	6 (14)	2 (8)	0 (0)	1 (2)	4 (7)	1 (3)	14 (5)	2 (3)	0 (0)	1 (33)	0 (0)	3 (3)	17 (5)
17	15	15	Bangladesh	0 (0)	1 (7)	4 (9)	2 (8)	0 (0)	0 (0)	1 (2)	1 (3)	9 (4)	3 (4)	0 (0)	2 (67)	0 (0)	5 (5)	14 (4)
15	16	16	Africa	0 (0)	0 (0)	3 (7)	0 (0)	0 (0)	2 (4)	5 (8)	0 (0)	10 (4)	1 (1)	0 (0)	0 (0)	0 (0)	1 (1)	11 (3)
19	19	17	Pakistan	0 (0)	0 (0)	2 (5)	0 (0)	0 (0)	0 (0)	2 (3)	2 (6)	6 (2)	2 (3)	0 (0)	0 (0)	0 (0)	2 (2)	8 (2)
15	17	18	Singapore	0 (0)	1 (7)	2 (5)	0 (0)	0 (0)	1 (2)	0 (0)	0 (0)	4 (2)	2 (3)	0 (0)	1 (33)	0 (0)	3 (3)	7 (2)
18	17	18	Oceania	1 (13)	0 (0)	2 (5)	1 (4)	0 (0)	0 (0)	1 (2)	1 (3)	6 (2)	1 (1)	0 (0)	0 (0)	0 (0)	1 (1)	7 (2)
21	20	20	Sri Lanka	0 (0)	1 (7)	0 (0)	1 (4)	0 (0)	1 (2)	0 (0)	1 (3)	4 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4 (1)
20	21	21	Russia	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (2)	0 (0)	1 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)
—	—	—	Others	0 (0)	0 (0)	0 (0)	1 (4)	1 (4)	2 (4)	0 (0)	1 (3)	5 (2)	1 (1)	0 (0)	0 (0)	0 (0)	1 (1)	6 (2)
Total				24	47	129	51	49	123	150	80	653	162	10	22	12	206	859
No. of firms				8	14	43	24	24	51	59	34	257	70	7	3	11	91	348 (100)

7. EXCHANGE RATES USED IN BUSINESS PLANS

(1) Thai Baht/ US dollar

Regarding the exchange rate used in business plans (Thai Baht/ US dollar), the predominant response was “A range between not less than 35.0 but less than 35.5 (34.5%) followed by “Not less than 35.5 but less than 36.0” (33.2%). The median rate was 35.10. (Table 7-1)

(Table 7-1) Exchange rates used in business plan (Thai Baht/ US dollar)

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

Industry Baht/ US dollar	Manufacturing									Non-manufacturing				Grand total
	Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electric/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Others	Non-manufacturing sector total	
Not less than 29 but less than 29.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 29.5 but less than 30	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 30 but less than 30.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 30.5 but less than 31	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 31 but less than 31.5	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 31.5 but less than 32	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 32 but less than 32.5	1	0	0	0	0	1	0	0	2	1	0	0	1	3 (1.3)
Not less than 32.5 but less than 33	0	0	0	1	1	0	0	0	2	1	0	0	1	3 (1.3)
Not less than 33 but less than 33.5	0	0	1	0	0	0	0	2	3	0	0	0	0	3 (1.3)
Not less than 33.5 but less than 34	0	0	0	0	0	1	0	0	1	1	0	0	1	2 (0.9)
Not less than 34 but less than 34.5	1	2	0	1	2	1	2	3	12	0	1	0	1	13 (5.8)
Not less than 34.5 but less than 35	0	1	0	0	0	4	1	1	7	2	0	0	2	9 (4.0)
Not less than 35 but less than 35.5	2	5	13	8	7	11	9	9	64	10	1	2	13	77 (34.5)
Not less than 35.5 but less than 36	1	2	13	7	3	15	9	8	58	16	0	0	16	74 (33.2)
Not less than 36 but less than 36.5	0	0	1	2	1	3	2	3	12	7	0	0	7	19 (8.5)
Not less than 36.5 but less than 37	0	2	3	1	1	0	0	1	8	3	0	0	3	11 (4.9)
Not less than 37 but less than 37.5	1	0	0	0	0	0	0	0	1	1	0	4	5	6 (2.7)
Not less than 37.5 but less than 38	0	0	0	0	0	0	0	1	1	0	0	0	0	1 (0.4)
Not less than 38 but less than 38.5	0	0	0	0	0	1	0	0	1	0	0	1	1	2 (0.9)
No. of firms	6	12	31	20	15	37	23	28	172	42	2	7	51	223
Average	34.78	35.16	35.39	35.21	34.96	35.27	35.09	35.16	35.18	35.39	34.50	36.64	35.55	35.25
Median	35.00	35.00	35.50	35.30	35.00	35.35	35.00	35.00	35.10	35.50	34.50	37.00	35.50	35.10
Mode	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	35.00	#N/A	37.00	35.00	35.00

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

The 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 previous survey)

Industry Thai Baht/ US dollar	Manufacturing									Non-manufacturing				Grand total
	Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electric/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Others	Non-manufacturing sector total	
Average	34.94	34.46	34.24	34.58	34.78	34.55	33.22	34.84	34.25	35.04	33.38	34.97	34.91	34.40
Median	35.00	34.00	35.50	35.00	35.00	35.00	35.00	35.00	35.00	35.50	33.75	36.00	35.50	35.00
Mode	#N/A	36.00	35.00	35.00	36.00	35.00	35.00	36.00	35.00	36.00	#N/A	36.00	36.00	35.00

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

The 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

Regarding the exchange rate used in business plans (Japanese Yen/ Thai Baht), the predominant response was “Not less than 3.2 but less than 3.3” (24.8%), followed by “Not less than 3.3 but less

than 3.4” (21.4%). The median rate was 3.20. (Table 7-2)

(Table 7-2) Exchange rates used in business plan (Japanese Yen/Thai Baht)

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

Industry Japanese Yen/Thai Baht	Manufacturing									Non-manufacturing				Grand total
	Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electric/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Others	Non-manufacturing sector total	
Not less than 2.6 but less than 2.7	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 2.7 but less than 2.8	0	0	1	1	0	0	0	0	2	0	0	0	0	2 (0.8)
Not less than 2.8 but less than 2.9	0	0	0	0	1	0	0	0	1	0	0	1	1	2 (0.8)
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)
Not less than 3 but less than 3.1	1	2	6	2	2	5	5	5	28	6	1	2	9	37 (14.1)
Not less than 3.1 but less than 3.2	1	3	2	1	5	10	10	3	35	9	0	3	12	47 (17.9)
Not less than 3.2 but less than 3.3	2	3	8	5	3	14	12	6	53	8	2	2	12	65 (24.8)
Not less than 3.3 but less than 3.4	1	2	9	3	3	7	11	7	43	11	1	1	13	56 (21.4)
Not less than 3.4 but less than 3.5	0	1	2	4	3	1	6	4	21	9	1	0	10	31 (11.8)
Not less than 3.5 but less than 3.6	1	0	6	0	1	1	5	2	16	4	0	1	5	21 (8.0)
Not less than 3.6 but less than 3.7	0	0	1	0	1	0	0	1	3	1	0	0	1	4 (1.5)
Not less than 3.7 but less than 3.8	0	0	0	0	0	1	0	0	1	0	0	0	0	1 (0.4)
Not less than 3.8 but less than 3.9	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 3.9 but less than 4	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
Not less than 4 but less than 4.1	0	0	0	0	0	0	0	0	0	0	0	0	0	0 (0.0)
No. of firms	6	11	34	15	18	39	49	28	200	48	5	9	62	262
Average	3.22	3.17	3.25	3.21	3.22	3.19	3.24	3.24	3.22	3.25	3.22	3.13	3.23	3.22
Median	3.20	3.20	3.30	3.20	3.20	3.20	3.20	3.25	3.20	3.30	3.20	3.10	3.20	3.20
Mode	3.20	3.20	3.30	3.20	3.10	3.20	3.20	3.30	3.20	3.30	3.20	3.10	3.30	3.20

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

The 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 previous survey)

Industry Japanese Yen/Thai Baht	Manufacturing									Non-manufacturing				Grand total
	Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electric/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Others	Non-manufacturing sector total	
Average	3.48	3.43	3.36	3.41	3.36	3.44	3.37	3.43	3.40	3.43	3.47	3.38	3.42	3.41
Median	3.50	3.43	3.40	3.40	3.38	3.42	3.37	3.40	3.40	3.40	3.40	3.40	3.40	3.40
Mode	3.50	3.60	3.40	3.40	3.30	3.40	3.50	3.40	3.40	3.50	3.40	3.50	3.40	3.40

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

The 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 2015 (simple average of the respondents) was 62.9% for “ASEAN” of which 56.1% was “Thailand” (Table 8-1).

Regarding the ratio of planned procurement sources in 2016, the percentage for “Thailand” is expected to increase by 3.6 points to 59.7% from the previous term and the percentage for “ASEAN” is expected to increase by 3.4% to 66.3% (Table 8-2).

(Table 8-1) Suppliers of parts and materials in 2015

Unit : %

Industry		ASEAN			Japan	China	Others	Total	No. of firms
			Thailand	ASEAN (Other than Thailand)					
Manufacturing	Food	86.1	85.6	0.6	5.6	7.2	1.1	100.0	9
	Textiles	66.8	64.2	2.6	9.7	9.5	13.9	100.0	12
	Chemicals	58.2	48.9	9.3	31.9	2.5	7.3	100.0	41
	Steel/Non-ferrous	45.2	40.3	5.0	40.4	3.6	10.7	100.0	25
	General machinery	64.3	59.1	5.2	27.6	6.9	1.2	100.0	21
	Electric/Electronic	57.3	43.4	13.9	30.0	9.7	3.0	100.0	47
	Transportation machinery	63.2	59.9	3.3	31.3	3.5	2.0	100.0	54
	Others	47.6	39.0	8.6	35.7	3.7	13.0	100.0	31
Manufacturing average		61.1	55.1	6.0	26.5	5.8	6.5	100.0	240
Non-manufacturing	Trading	57.1	46.0	11.1	32.0	7.2	3.6	100.0	58
	Retailing	49.2	37.5	11.7	50.8	0.0	0.0	100.0	6
	Construction	77.0	77.0	0.0	23.0	0.0	0.0	100.0	5
	Others	75.4	68.0	7.4	22.6	0.0	2.0	100.0	5
	Non-Manufacturing average	64.7	57.1	7.5	32.1	1.8	1.4	100.0	74
Grand total		62.9	56.1	6.8	29.3	3.8	4.0	100.0	314

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

(Table 8-2) Suppliers of parts and materials in 2016

Unit : %

Industry		ASEAN			Japan	China	Others	Total	No. of firms
			Thailand	ASEAN (Other than Thailand)					
Manufacturing	Food	85.0	84.4	0.6	5.6	8.3	1.1	100.0	9
	Textiles	66.2	63.4	2.8	10.1	8.9	14.8	100.0	12
	Chemicals	60.6	52.7	7.9	29.2	2.9	7.4	100.0	40
	Steel/Non-ferrous	45.9	42.8	3.2	42.1	3.0	9.0	100.0	24
	General machinery	66.6	61.6	5.0	25.7	6.6	1.1	100.0	21
	Electric/Electronic	58.6	44.4	14.1	29.4	9.3	2.8	100.0	47
	Transportation machinery	65.2	61.4	3.8	29.5	3.2	2.1	100.0	54
	Others	50.5	41.4	9.1	33.9	3.8	11.7	100.0	30
Manufacturing average		62.3	56.5	5.8	25.7	5.8	6.3	100.0	237
Non-manufacturing	Trading	53.9	43.4	10.4	32.9	9.2	4.0	100.0	59
	Retailing	66.5	53.2	13.3	33.3	0.0	0.2	100.0	6
	Construction	85.0	85.0	0.0	13.0	2.0	0.0	100.0	5
	Others	75.4	70.0	5.4	22.6	0.0	2.0	100.0	5
	Non-Manufacturing average	70.2	62.9	7.3	25.5	2.8	1.5	100.0	75
Grand total		66.3	59.7	6.5	25.6	4.3	3.9	100.0	312

(Note) Same as Table 8-1.

9. CHALLENGES FOR CORPORATE MANAGEMENT

Regarding the challenges for corporate management (check all that apply), the predominant response was “Severe competition by competitors” (68%), followed by “Increases in total labor cost” (44%) and “Sluggish domestic demand” (34%).

By industry, the other major response in the manufacturing sector was “Lack of human resources of engineer level” (41%), and in the non-manufacturing sector “Lack of human resources on manager-level” (27%). (Table 9)

(Table 9) Challenges for corporate management (check all that apply)

Unit: No. of firms and (%)

Last time This time		Manufacturing										Non-manufacturing						Grand total
		Food	Textiles	Chemicals	Steel /Non-ferrous metal	General machinery	Electric /Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/ insurance	Construction / Engineering	Transportation / communication	Others	Non-manufacturing sector total	
1	1	6 (67)	8 (67)	29 (66)	17 (65)	15 (68)	34 (72)	44 (73)	21 (60)	174 (68)	38 (60)	6 (67)	12 (71)	31 (91)	24 (75)	25 (52)	136 (67)	310 (68)
2	2	4 (44)	7 (58)	18 (41)	10 (38)	13 (59)	26 (55)	36 (60)	14 (40)	128 (50)	19 (30)	2 (22)	4 (24)	12 (35)	20 (63)	16 (33)	73 (36)	201 (44)
-	3	0 (0)	7 (58)	14 (32)	11 (42)	9 (41)	10 (21)	31 (52)	2 (6)	84 (33)	15 (24)	2 (22)	7 (41)	22 (65)	14 (44)	12 (25)	72 (35)	156 (34)
3	4	1 (11)	4 (33)	20 (45)	9 (35)	12 (55)	18 (38)	25 (42)	16 (46)	105 (41)	7 (11)	1 (11)	0 (0)	11 (32)	4 (13)	14 (29)	37 (18)	142 (31)
3	5	4 (44)	2 (17)	11 (25)	9 (35)	8 (36)	18 (38)	23 (38)	14 (40)	89 (35)	35 (56)	2 (22)	0 (0)	1 (3)	2 (6)	7 (15)	47 (23)	136 (30)
6	6	2 (22)	6 (50)	14 (32)	8 (31)	8 (36)	16 (34)	20 (33)	17 (49)	91 (36)	7 (11)	0 (0)	0 (0)	7 (21)	10 (31)	7 (15)	31 (15)	122 (27)
8	7	1 (11)	1 (8)	13 (30)	5 (19)	3 (14)	9 (19)	12 (20)	12 (34)	56 (22)	14 (22)	2 (22)	4 (24)	8 (24)	11 (34)	15 (31)	54 (27)	110 (24)
5	8	4 (44)	7 (58)	7 (16)	7 (27)	2 (9)	12 (26)	8 (13)	8 (23)	55 (22)	16 (25)	2 (22)	6 (35)	6 (18)	8 (25)	8 (17)	46 (23)	101 (22)
6	9	2 (22)	0 (0)	7 (16)	5 (19)	5 (23)	5 (11)	13 (22)	8 (23)	45 (18)	18 (29)	4 (44)	5 (29)	3 (9)	9 (28)	13 (27)	52 (26)	97 (21)
9	10	5 (56)	3 (25)	7 (16)	3 (12)	1 (5)	8 (17)	9 (15)	11 (31)	47 (18)	6 (10)	0 (0)	0 (0)	1 (3)	2 (6)	2 (4)	11 (5)	58 (13)
11	11	1 (11)	2 (17)	1 (2)	1 (4)	1 (5)	6 (13)	8 (13)	4 (11)	24 (9)	1 (2)	2 (22)	0 (0)	8 (24)	2 (6)	3 (6)	16 (8)	40 (9)
10	12	2 (22)	1 (8)	4 (9)	1 (4)	2 (9)	2 (4)	0 (0)	3 (9)	15 (6)	4 (6)	3 (33)	2 (12)	3 (9)	3 (9)	7 (15)	22 (11)	37 (8)
13	13	0 (0)	0 (0)	2 (5)	2 (8)	1 (5)	1 (2)	2 (3)	3 (9)	11 (4)	6 (10)	0 (0)	1 (6)	2 (6)	0 (0)	1 (2)	10 (5)	21 (5)
14	14	0 (0)	0 (0)	2 (5)	2 (8)	0 (0)	2 (4)	7 (12)	2 (6)	15 (6)	2 (3)	0 (0)	0 (0)	0 (0)	2 (6)	0 (0)	4 (2)	19 (4)
14	15	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	1 (2)	1 (2)	0 (0)	3 (1)	7 (11)	0 (0)	0 (0)	0 (0)	1 (3)	6 (13)	14 (7)	17 (4)
-	15	0 (0)	0 (0)	1 (2)	0 (0)	1 (5)	0 (0)	0 (0)	0 (0)	2 (1)	5 (8)	1 (11)	1 (6)	2 (6)	2 (6)	4 (8)	15 (7)	17 (4)
12	15	2 (22)	1 (8)	4 (9)	3 (12)	1 (5)	2 (4)	1 (2)	0 (0)	14 (5)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	2 (4)	3 (1)	17 (4)
18	18	0 (0)	1 (8)	1 (2)	0 (0)	1 (5)	1 (2)	0 (0)	1 (3)	5 (2)	2 (3)	0 (0)	0 (0)	0 (0)	1 (3)	0 (0)	3 (1)	8 (2)
15	19	0 (0)	0 (0)	0 (0)	2 (8)	0 (0)	1 (2)	2 (3)	1 (3)	6 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	6 (1)
-	-	0 (0)	0 (0)	1 (2)	0 (0)	1 (5)	1 (2)	4 (7)	0 (0)	7 (3)	2 (3)	1 (11)	1 (6)	0 (0)	0 (0)	3 (6)	7 (3)	14 (3)
Total		34	50	156	95	85	173	246	137	976	204	28	43	117	116	145	653	1,629
No. of firms		9	12	44	26	22	47	60	35	255	63	9	17	34	32	48	203	458 (100)

(Note) "Sluggish domestic demand" and ""Rent hike" are added this time.

10. REQUESTS TO THE THAI GOVERNMENT

Regarding requests to the Thai government (check all that apply), the predominant response was “Promotion of economic measures (Development of public infrastructure)” (57%), followed by “Stability of the political situation” (56%), “Customs-related systems and their implementation” (43%), and “Development of infrastructure in the Bangkok metropolitan area” (41%). By industry, the other major response in the manufacturing sector was “Stability of the security and safety” (28%), and in the non-manufacturing sector “Relaxation of the Foreign Business Act” (43%) and “Work permit/visa-related issues” (30%) (Table 10)

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

Unit: No. of firms and (%)

Last time	This time		Manufacturing										Non-manufacturing								Grand total
			Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electric/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Finance/ securities / insurance	Construction / Engineering	Transportation / communication	Others	Non-manufacturing sector total			
1	1	Promotion of economic measures (Development of public infrastructure)	4 (44)	8 (67)	21 (48)	15 (58)	14 (64)	26 (57)	44 (76)	17 (49)	149 (59)	32 (50)	3 (33)	12 (71)	23 (68)	17 (53)	24 (51)	111 (55)	260 (57)		
2	2	Stability of the political situation	4 (44)	6 (50)	29 (66)	11 (42)	12 (55)	30 (65)	35 (60)	22 (63)	149 (59)	34 (53)	7 (78)	10 (59)	23 (68)	12 (38)	20 (43)	106 (52)	255 (56)		
3	3	Customs-related systems and their implementation	4 (44)	3 (25)	16 (36)	12 (46)	12 (55)	25 (54)	24 (41)	14 (40)	110 (44)	44 (69)	5 (56)	1 (6)	6 (18)	19 (59)	10 (21)	85 (42)	195 (43)		
5	4	Development of infrastructure in the Bangkok metropolitan area	5 (56)	6 (50)	17 (39)	8 (31)	10 (45)	17 (37)	21 (36)	9 (26)	93 (37)	36 (56)	3 (33)	5 (29)	12 (35)	18 (56)	20 (43)	94 (46)	187 (41)		
4	5	Stability of security and safety	4 (44)	3 (25)	15 (34)	5 (19)	4 (18)	19 (41)	14 (24)	6 (17)	70 (28)	24 (38)	1 (11)	7 (41)	10 (29)	8 (25)	15 (32)	65 (32)	135 (30)		
6	5	Relaxation of the Foreign Business Act	3 (33)	0 (0)	10 (23)	2 (8)	5 (23)	12 (26)	10 (17)	5 (14)	47 (19)	30 (47)	3 (33)	4 (24)	20 (59)	12 (38)	19 (40)	88 (43)	135 (30)		
8	7	Implementation of tax-related systems	2 (22)	0 (0)	7 (16)	4 (15)	9 (41)	14 (30)	11 (19)	11 (31)	58 (23)	20 (31)	0 (0)	3 (18)	12 (35)	12 (38)	12 (26)	59 (29)	117 (26)		
10	8	Improvement of education/ human resource development	1 (11)	3 (25)	14 (32)	9 (35)	6 (27)	8 (17)	19 (33)	7 (20)	67 (27)	8 (13)	1 (11)	4 (24)	4 (12)	8 (25)	12 (26)	37 (18)	104 (23)		
9	9	Work permit/visa-related issues	1 (11)	2 (17)	5 (11)	2 (8)	3 (14)	8 (17)	5 (9)	6 (17)	32 (13)	14 (22)	2 (22)	5 (29)	10 (29)	9 (28)	21 (45)	61 (30)	93 (20)		
7	10	Stability in foreign exchange rates	2 (22)	3 (25)	8 (18)	5 (19)	8 (36)	15 (33)	11 (19)	5 (14)	57 (23)	18 (28)	1 (11)	2 (12)	2 (6)	1 (3)	3 (6)	27 (13)	84 (18)		
16	11	Implementation of drought management measures	3 (33)	2 (17)	12 (27)	4 (15)	5 (23)	7 (15)	13 (22)	6 (17)	52 (21)	8 (13)	0 (0)	5 (29)	3 (9)	6 (19)	3 (6)	25 (12)	77 (17)		
13	12	Development of the communication infrastructure	2 (22)	1 (8)	3 (7)	1 (4)	6 (27)	9 (20)	6 (10)	5 (14)	33 (13)	12 (19)	1 (11)	3 (18)	8 (24)	10 (31)	7 (15)	41 (20)	74 (16)		
15	13	Implementation of flood prevention measures	2 (22)	1 (8)	10 (23)	3 (12)	4 (18)	13 (28)	10 (17)	5 (14)	48 (19)	11 (17)	0 (0)	3 (18)	3 (9)	3 (9)	5 (11)	25 (12)	73 (16)		
11	14	Logistic infrastructure development linking Thailand with neighbouring countries (CLMV and India etc.)	1 (11)	5 (42)	10 (23)	2 (8)	0 (0)	3 (7)	9 (16)	6 (17)	36 (14)	10 (16)	1 (11)	3 (18)	6 (18)	12 (38)	4 (9)	36 (18)	72 (16)		
12	15	Promotion of economic ties e.g. FTA, EPA etc.	2 (22)	5 (42)	6 (14)	4 (15)	1 (5)	5 (11)	11 (19)	1 (3)	35 (14)	9 (14)	1 (11)	0 (0)	2 (6)	2 (6)	2 (4)	16 (8)	51 (11)		
14	16	Prevention of labour disputes	2 (22)	2 (17)	5 (11)	0 (0)	3 (14)	9 (20)	17 (29)	2 (6)	40 (16)	0 (0)	0 (0)	0 (0)	1 (3)	4 (13)	2 (4)	7 (3)	47 (10)		
18	17	Promotion of employment of foreign labour	0 (0)	1 (8)	3 (7)	3 (12)	0 (0)	7 (15)	2 (3)	3 (9)	19 (8)	4 (6)	1 (11)	0 (0)	3 (9)	2 (6)	5 (11)	15 (7)	34 (7)		
17	18	Promotion of regional operating headquarters function (e.g. IHQ)	0 (0)	1 (8)	4 (9)	0 (0)	2 (9)	3 (7)	1 (2)	2 (6)	13 (5)	11 (17)	0 (0)	1 (6)	0 (0)	3 (9)	4 (9)	19 (9)	32 (7)		
19	19	Protection of intellectual property rights	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	0 (0)	3 (5)	1 (3)	5 (2)	3 (5)	0 (0)	0 (0)	0 (0)	1 (3)	2 (4)	6 (3)	11 (2)		
-	-	Others	0 (0)	2 (17)	3 (7)	2 (8)	0 (0)	1 (2)	1 (2)	2 (6)	11 (4)	3 (5)	0 (0)	1 (6)	0 (0)	1 (3)	1 (2)	6 (3)	17 (4)		
Total			42	54	198	92	105	231	267	135	1124	331	30	69	148	160	191	929	2853		
No. of firms			9	12	44	26	22	46	58	35	252	64	9	17	34	32	47	203	455 (100)		

11. ISSUES ON CUSTOMS CLEARANCE PROCEDURE

Regarding issued on customs clearance procedure (check all that apply), the predominant response was “Tariff classification (custom rate) and Customs valuation (including royalty and license fees) vary depending on the Customs Offices/Officers” (52%) , followed by “Small mistakes in an invoice, certification of origin, shipping documents, etc. are pointed out and it takes time to revise (consignment/cargos should be stored on a warehouse)” (37%) and “Rules applicable to certificates of origin for the Japan-Thailand Economic Partnership Agreement (JTEPA) and ASEAN Trade in Goods Agreement (ATIGA) are too strict.” (25%) etc. (Table 11)

(Table 11) Issues on customs clearance procedure (Check all that apply)

Table 11/ Issues on customs clearance procedure (Check all that apply)

Unit: No. of firms and (%)

Ranking		Manufacturing									Non-manufacturing						Grand total
		Food	Textiles	Chemicals	Steel/Non-ferrous metal	General machinery	Electric/Electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retailing	Construction/Engineering	Transportation/communication	Others	Non-manufacturing sector total	
1	Tariff classification (custom rate) and Customs valuation (including royalty and license fees) vary depending on the Customs Offices/ Officers	4 (50)	1 (13)	19 (54)	10 (50)	14 (70)	20 (51)	21 (47)	0 (0)	102 (51)	32 (59)	3 (60)	6 (40)	11 (55)	8 (44)	60 (54)	162 (52)
2	Small mistakes in an invoice, certification of origin, shipping documents, etc. are pointed out and it takes time to revise (consignment /cargos should be stored in a warehouse).	5 (63)	5 (63)	14 (40)	3 (15)	8 (40)	18 (46)	15 (33)	0 (0)	78 (39)	18 (33)	1 (20)	6 (40)	8 (40)	4 (22)	37 (33)	115 (37)
3	Rules applicable to certificates of origin for the Japan-Thailand Economic Partnership Agreement (JTEPA) and ASEAN Trade in Goods Agreement (ATIGA) are too strict.	1 (13)	2 (25)	10 (29)	10 (50)	4 (20)	7 (18)	14 (31)	0 (0)	55 (27)	14 (26)	0 (0)	2 (13)	5 (25)	1 (6)	22 (20)	77 (25)
4	Penalty for mistakes on application forms is excessive and the criteria (50% to 400% of the shortage of the amount) is unclear.	0 (0)	0 (0)	6 (17)	2 (10)	7 (35)	11 (28)	11 (24)	0 (0)	47 (23)	16 (30)	0 (0)	0 (0)	6 (30)	5 (28)	27 (24)	74 (24)
5	Reimbursement of duty such as BIS19 takes too long period time.	3 (38)	4 (50)	6 (17)	8 (40)	4 (20)	4 (10)	13 (29)	0 (0)	51 (25)	11 (20)	0 (0)	0 (0)	2 (10)	3 (17)	16 (14)	67 (21)
6	Submission of many irrelevant documents without rational reasons is requested for exports	1 (13)	0 (0)	6 (17)	3 (15)	3 (15)	6 (15)	5 (11)	0 (0)	31 (15)	5 (9)	1 (20)	3 (20)	2 (10)	2 (11)	13 (12)	44 (14)
7	For shipment with no fixed price at the time of import declaration, it takes too long period of the time to obtain payment notification after reporting the fixed price such that surcharge or penalty is applied in some cases.	0 (0)	0 (0)	3 (9)	1 (5)	2 (10)	4 (10)	3 (7)	0 (0)	14 (7)	5 (9)	0 (0)	1 (7)	1 (5)	0 (0)	7 (6)	21 (7)
—	Others	0 (0)	1 (13)	3 (9)	1 (5)	1 (5)	4 (10)	2 (4)	0 (0)	13 (6)	3 (6)	0 (0)	2 (13)	3 (15)	5 (28)	13 (12)	26 (8)
Total		14	13	67	38	43	74	84	0	391	104	5	20	38	28	195	586
No. of firms		8	8	35	20	20	39	45	26	201	54	5	15	20	18	112	313 (100)

12. IMPACT OF DROUGHT

(1) Impact of the drought on business

Regarding impact of drought on business (check all that apply), the predominant response was “None” (49%) whereas “Directly affected” (6%) and “Indirectly affected” (29%). 18% of the firms replied “Don’t know”. (Table 12-1)

(Table 12-1) Impact of the drought on business

Unit: No. of firms and (%)

Industry		None	Directly affected	Indirectly affected	Don't know	No. of firms
Manufacturing	Food	2 (22)	0 (0)	6 (67)	1 (11)	9
	Textile	7 (58)	1 (8)	4 (33)	0 (0)	12
	Chemical	17 (39)	6 (14)	12 (27)	9 (20)	44
	Steel/Non-ferrous metal	13 (50)	1 (4)	10 (38)	2 (8)	26
	General machinery	13 (59)	1 (5)	6 (27)	2 (9)	22
	Electric/electronic machinery	28 (60)	6 (13)	11 (23)	3 (6)	47
	Transportation machinery	25 (42)	3 (5)	29 (49)	5 (8)	59
	Others	18 (51)	5 (14)	9 (26)	6 (17)	35
Manufacturing sector total		123 (48)	23 (9)	87 (34)	28 (11)	254
Non-manufacturing	Trading	31 (48)	4 (6)	12 (19)	17 (27)	64
	Retail	6 (67)	0 (0)	3 (33)	0 (0)	9
	Finance/ insurance/ securities	6 (35)	0 (0)	6 (35)	5 (29)	17
	Construction/ engineering	17 (50)	0 (0)	7 (21)	13 (38)	34
	Transportation/ communication	10 (32)	0 (0)	8 (26)	13 (42)	31
	Others	32 (68)	0 (0)	9 (19)	7 (15)	47
Non-manufacturing sector total		102 (50)	4 (2)	45 (22)	55 (27)	202
Grand total		225 (49)	27 (6)	132 (29)	83 (18)	456

(2) Specific impact of drought

Regarding specific impact of drought (check all that apply), the predominant response was “(Indirect effect) decrease in sales” (57%) followed by “Concern for industrial water supply” (29%) and “Shortage and price hike of raw materials” (14%). (Table 12-2)

(Note) Respondents are firms that replied “Directly affected” and “Indirectly affected” in Question 12-1 only.

(Table 12-2) Specific impact of drought (Check all that apply)

Ranking		Manufacturing									Non-manufacturing						Grand total
		Food	Textile	Chemical	Steel /Non-ferrous metal	General machinery	Electric/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retail	Construction / engineering	Transportation / communication	Others	Non-manufacturing sector total	
1	Sales decrease (indirect effect)	1 (17)	3 (75)	9 (50)	6 (55)	5 (71)	3 (21)	20 (74)	0 (0)	53 (54)	8 (57)	2 (67)	2 (40)	5 (100)	10 (71)	27 (66)	80 (57)
2	Concern for industrial water supply	0 (0)	2 (50)	7 (39)	5 (45)	1 (14)	9 (64)	5 (19)	0 (0)	36 (36)	3 (21)	0 (0)	1 (20)	0 (0)	0 (0)	4 (10)	40 (29)
3	Shortage/price increase of raw materials	5 (83)	0 (0)	2 (11)	0 (0)	0 (0)	0 (0)	2 (7)	0 (0)	13 (13)	4 (29)	1 (33)	1 (20)	0 (0)	1 (7)	7 (17)	20 (14)
4	Deterioration of water quality	2 (33)	0 (0)	2 (11)	2 (18)	0 (0)	3 (21)	4 (15)	0 (0)	15 (15)	1 (7)	0 (0)	1 (20)	0 (0)	0 (0)	2 (5)	17 (12)
-	Others	0 (0)	0 (0)	1 (6)	0 (0)	2 (29)	2 (14)	1 (4)	0 (0)	6 (6)	1 (7)	0 (0)	1 (20)	0 (0)	3 (21)	5 (12)	11 (8)
Total		8	5	21	13	8	17	32	0	123	17	3	6	5	14	45	168
No. of firms		6	4	18	11	7	14	27	12	99	14	3	5	5	14	41	140 (100)

(3) Measures taken by your company

Regarding measures taken by your company (check all that apply), the predominant response was “Review of production plans (including inventory increase)” (35%) followed by “Water-saving measure (awareness campaign for employees)” (34%) and “Implementation of drought management, such as recycle of water, search for underground water, and use of water storage tanks.” (22%). (Table 12-3)

(Note) Respondents are firms that replied “Directly affected” and “Indirectly affected” in Question 12-1 only.

(Table 12-3) Measures taken by your company (Check all that apply)

Ranking		Manufacturing									Non-manufacturing						Grand total
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electric/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retail	Construction / engineering	Transportation / communication	Others	Non-manufacturing sector total	
1	Review of production plans (including inventory increase)	1 (20)	3 (75)	8 (44)	3 (43)	4 (67)	1 (7)	10 (42)	0 (0)	35 (40)	4 (44)	0 (0)	0 (0)	0 (0)	2 (22)	6 (21)	41 (35)
2	Water-saving measure (awareness campaign for employees)	3 (60)	2 (50)	6 (33)	3 (43)	2 (33)	7 (47)	6 (25)	0 (0)	34 (39)	2 (22)	2 (67)	1 (25)	1 (25)	0 (0)	6 (21)	40 (34)
3	Implementation of drought management, such as recycle of used water, search for underground water, and installment of water storage tanks.	2 (40)	1 (25)	3 (17)	1 (14)	0 (0)	6 (40)	4 (17)	0 (0)	22 (25)	0 (0)	1 (33)	2 (50)	0 (0)	1 (11)	4 (14)	26 (22)
4	Installment of desalination facilities against mixing in sea water	1 (20)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (2)
-	Others	0 (0)	0 (0)	2 (11)	2 (29)	0 (0)	4 (27)	5 (21)	0 (0)	13 (15)	3 (33)	0 (0)	1 (25)	3 (75)	6 (67)	13 (45)	26 (22)
Total		7	6	19	9	6	18	25	0	106	9	3	4	4	9	29	135
No. of firms		5	4	18	7	6	15	24	9	88	9	3	4	4	9	29	117 (100)

13. PERSONNEL SHORTAGE/ HUMAN RESOURCES DEVELOPMENT

(1) Type of jobs that personnel shortage is recognized

Regarding the type of jobs that personnel shortage is recognized (check all that apply), the predominant response was “Engineer (including IT position)” (52%) followed by Clerical managers” (31%) and “Clerks with Japanese language skills” (23%).

By industry, the other major responses in non-manufacturing sector were “Salespersons (Clerical)” (28%) and “Salespersons (technical)” (23%). (Table 13-1)

(Table 13-1) Type of Jobs that personnel shortage is recognized (Check all that apply)

Unit: No. of firms and (%)

Unit: No. of firms and (%)

Ranking		Manufacturing									Non-manufacturing						Grand total
		Food	Textile	Chemical	Steel /Non-ferrous metal	General machinery	Electric/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retail	Construction / engineering	Transportation / communication	Others	Non-manufacturing sector total	
1	Engineers (including ICT)	3 (33)	7 (70)	27 (61)	14 (64)	17 (77)	32 (68)	40 (73)	0 (0)	163 (67)	14 (25)	2 (22)	21 (68)	3 (11)	22 (36)	62 (34)	225 (52)
2	Clerical managers	2 (22)	3 (30)	14 (32)	6 (27)	4 (18)	15 (32)	19 (35)	0 (0)	74 (30)	17 (30)	2 (22)	7 (23)	14 (52)	21 (34)	61 (33)	135 (31)
3	Clerks with Japanese language skills	3 (33)	1 (10)	17 (39)	5 (23)	7 (32)	14 (30)	17 (31)	0 (0)	71 (29)	12 (21)	1 (11)	4 (13)	4 (15)	8 (13)	29 (16)	100 (23)
4	Salesperson (technical)	1 (11)	2 (20)	14 (32)	2 (9)	9 (41)	5 (11)	9 (16)	0 (0)	48 (20)	20 (35)	0 (0)	12 (39)	4 (15)	6 (10)	42 (23)	90 (21)
5	Salesperson (clerical)	0 (0)	3 (30)	10 (23)	5 (23)	2 (9)	5 (11)	5 (9)	0 (0)	35 (14)	17 (30)	2 (22)	3 (10)	9 (33)	21 (34)	52 (28)	87 (20)
6	Staff (Accounting/ Administration)	3 (33)	0 (0)	4 (9)	2 (9)	2 (9)	6 (13)	10 (18)	0 (0)	31 (13)	11 (19)	2 (22)	2 (6)	6 (22)	14 (23)	35 (19)	66 (15)
7	Staff (Clerical staff excluding Accounting/ Administration)	0 (0)	0 (0)	5 (11)	0 (0)	0 (0)	4 (9)	6 (11)	0 (0)	17 (7)	4 (7)	2 (22)	0 (0)	4 (15)	4 (7)	14 (8)	31 (7)
8	Export/Import/ Procurement professionals	1 (11)	1 (10)	2 (5)	0 (0)	2 (9)	3 (6)	5 (9)	0 (0)	17 (7)	5 (9)	1 (11)	0 (0)	3 (11)	1 (2)	10 (5)	27 (6)
8	Plant and machinery workers	4 (44)	2 (20)	1 (2)	0 (0)	2 (9)	0 (0)	1 (2)	0 (0)	16 (7)	1 (2)	2 (22)	2 (6)	3 (11)	3 (5)	11 (6)	27 (6)
10	Driver	0 (0)	0 (0)	1 (2)	1 (5)	1 (5)	0 (0)	0 (0)	0 (0)	4 (2)	4 (7)	0 (0)	1 (3)	4 (15)	3 (5)	12 (6)	16 (4)
-	Others	0 (0)	0 (0)	2 (5)	2 (9)	1 (5)	1 (2)	4 (7)	0 (0)	10 (4)	2 (4)	1 (11)	5 (16)	1 (4)	2 (3)	11 (6)	21 (5)
Total		17	19	97	37	47	85	116	0	486	107	15	57	55	105	339	825
No. of firms		9	10	44	22	22	47	55	35	244	57	9	31	27	61	185	429 (100)

(2) Shortage of Engineers

Regarding of shortage of engineers by industry (check all that apply), the predominant response by industry was “Mechanical engineers” (53%) followed by “Electrical/ electronic engineers” (38%) and “IT (information processing/ telecommunication) engineers” (23%). (Table 13-2).

By profession, the predominant response was “Production management engineers” (52%) followed by “Sales Engineers” (28%) and “R&D Engineers” (27%) (Table 13-3).

(Note) Respondents are firms that replied “Engineer (including IT engineer)” in Question 13-1 only.

(Table 13-2) Types of engineers in shortage by industry (Check all that apply)

Unit: No. of firms and (%)																	
Ranking		Manufacturing									Non-manufacturing						Grand total
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electric/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retail	Construction/ engineering	Transportation/ communication	Others	Non-manufacturing sector total	
1	Mechanical engineers	3 (100)	5 (71)	15 (56)	8 (57)	13 (76)	16 (50)	30 (63)	0 (0)	102 (60)	6 (50)	0 (0)	8 (38)	1 (33)	6 (29)	21 (36)	123 (53)
2	Electrical/ electronics engineers	3 (100)	0 (0)	4 (15)	4 (29)	10 (59)	29 (91)	14 (29)	0 (0)	70 (41)	4 (33)	0 (0)	7 (33)	0 (0)	6 (29)	17 (29)	87 (38)
3	Information and communications technology engineers	1 (33)	2 (29)	2 (7)	1 (7)	2 (12)	9 (28)	7 (15)	0 (0)	32 (19)	3 (25)	1 (50)	0 (0)	3 (100)	14 (67)	21 (36)	53 (23)
4	Chemical engineers	0 (0)	4 (57)	20 (74)	1 (7)	0 (0)	1 (3)	1 (2)	0 (0)	30 (18)	1 (8)	0 (0)	3 (14)	0 (0)	2 (10)	6 (10)	36 (16)
5	Automobile engineers	0 (0)	0 (0)	2 (7)	1 (7)	0 (0)	0 (0)	18 (38)	0 (0)	22 (13)	0 (0)	1 (50)	0 (0)	0 (0)	1 (5)	2 (3)	24 (10)
6	Architects/ Civil engineers	0 (0)	0 (0)	1 (4)	0 (0)	1 (6)	0 (0)	0 (0)	0 (0)	3 (2)	1 (8)	0 (0)	15 (71)	0 (0)	3 (14)	19 (32)	22 (10)
7	Metal engineers	0 (0)	0 (0)	0 (0)	7 (50)	0 (0)	0 (0)	3 (6)	0 (0)	11 (6)	0 (0)	0 (0)	0 (0)	0 (0)	2 (10)	2 (3)	13 (6)
8	Food engineers	1 (33)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)	1 (8)	0 (0)	0 (0)	0 (0)	1 (5)	2 (3)	3 (1)
9	Agricultural/Forestry engineers	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (17)	0 (0)	0 (0)	0 (0)	0 (0)	2 (3)	2 (1)
10	Medical engineers	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	1 (2)	1 (0)
-	Others	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	0 (0)	0 (0)	0 (0)	1 (1)	0 (0)	0 (0)	1 (5)	0 (0)	1 (5)	2 (3)	3 (1)
Total		8	11	44	22	27	55	73	0	272	18	2	34	4	37	95	367
No. of firms		3	7	27	14	17	32	48	23	171	12	2	21	3	21	59	230 (100)

(Table 13-3) Types of engineers in shortage by profession (Check all that apply)

Unit: No. of firms and (%)																	
Ranking		Manufacturing									Non-manufacturing						Grand total
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electric/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retail	Construction/ engineering	Transportation/ communication	Others	Non-manufacturing sector total	
1	Production management engineers	2 (100)	6 (86)	21 (84)	7 (70)	4 (24)	16 (52)	22 (67)	0 (0)	87 (62)	2 (17)	0 (0)	6 (40)	1 (33)	4 (20)	13 (25)	100 (52)
2	Sales engineers (Marketing)	0 (0)	1 (14)	8 (32)	2 (20)	6 (35)	5 (16)	7 (21)	0 (0)	32 (23)	8 (67)	0 (0)	4 (27)	2 (67)	8 (40)	22 (42)	54 (28)
3	R&D engineers	0 (0)	4 (57)	7 (28)	1 (10)	5 (29)	9 (29)	15 (45)	0 (0)	47 (33)	1 (8)	0 (0)	0 (0)	1 (33)	4 (20)	6 (12)	53 (27)
4	Service engineers	0 (0)	0 (0)	2 (8)	1 (10)	9 (53)	4 (13)	6 (18)	0 (0)	24 (17)	5 (42)	1 (50)	3 (20)	1 (33)	7 (35)	17 (33)	41 (21)
5	Designers	0 (0)	1 (14)	0 (0)	0 (0)	1 (6)	2 (6)	0 (0)	0 (0)	5 (4)	0 (0)	1 (50)	4 (27)	0 (0)	2 (10)	7 (13)	12 (6)
6	Testing engineers	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	4 (13)	2 (6)	0 (0)	6 (4)	1 (8)	0 (0)	0 (0)	1 (33)	1 (5)	3 (6)	9 (5)
7	Others	0 (0)	0 (0)	1 (4)	0 (0)	1 (6)	0 (0)	2 (6)	0 (0)	4 (3)	0 (0)	0 (0)	2 (13)	1 (33)	2 (10)	5 (10)	9 (5)
Total		2	12	39	11	26	40	54	0	205	17	2	19	7	28	73	278
No. of firms		2	7	25	10	17	31	33	16	141	12	2	15	3	20	52	193 (100)

14. INVESTMENT PROMOTION POLICY

(1) Interest in the investment promotion (incentive) policies

Regarding interest in the investment promotion (incentive) policies, the responses were “Interested” (45%), “Not interested” (14%), “No investment plan” (25%) and “Don’t know” (16%). (Table 14-1)

(Table 14-1) Interest in the investment promotion (incentive) policies

Unit: No. of firms and (%)

Industry		Interested	Not interested	No investment plan	Don't know	No. of firms
Manufacturing	Food	6 (67)	2 (22)	1 (11)	0 (0)	9
	Textile	7 (58)	3 (25)	2 (17)	0 (0)	12
	Chemical	20 (47)	7 (16)	11 (26)	5 (12)	43
	Steel/Non-ferrous metal	6 (23)	2 (8)	16 (62)	2 (8)	26
	General machinery	6 (27)	3 (14)	9 (41)	4 (18)	22
	Electric/electronic machinery	26 (55)	3 (6)	9 (19)	9 (19)	47
	Transportation machinery	31 (52)	6 (10)	12 (20)	11 (18)	60
	Others	19 (54)	8 (23)	4 (11)	4 (11)	35
	Manufacturing sector total	121 (48)	34 (13)	64 (25)	35 (14)	254
Non-manufacturing	Trading	35 (55)	5 (8)	10 (16)	14 (22)	64
	Retail	2 (25)	3 (38)	2 (25)	1 (13)	8
	Finance/ insurance/ securities	11 (65)	2 (12)	4 (24)	0 (0)	17
	Construction/ engineering	10 (29)	5 (15)	16 (47)	3 (9)	34
	Transportation/ communication	11 (35)	4 (13)	6 (19)	10 (32)	31
	Others	12 (27)	11 (24)	11 (24)	11 (24)	45
	Non-manufacturing sector total	81 (41)	30 (15)	49 (25)	39 (20)	199
Grand total		202 (45)	64 (14)	113 (25)	74 (16)	453

(2) The most interested investment promotion (incentive) policy

Regarding the most interested investment promotion (incentive) policy, the predominant responses was “New investment promotion policy” (50%) followed by “International Headquarters (IHQ)” (18%) and “International Trade Center (ITC)” (13%) (Table 14-2).

(Note) Respondents are firms that replied in Questions 14-1 Interested only.

(Table 14-2) The most interested investment promotion (incentive) policy

Unit: No. of firms and (%)

Ranking		Manufacturing									Non-manufacturing						Grand total
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electric/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retail	Construction/ engineering	Transportation/ communication	Others	Non-manufacturing sector total	
1	New investment promotion policy	5 (83)	3 (60)	10 (59)	4 (67)	4 (80)	8 (44)	15 (60)	11 (69)	60 (61)	3 (14)	1 (50)	5 (63)	0 (0)	6 (46)	15 (29)	75 (50)
2	International Headquarters (IHQ)	1 (17)	0 (0)	1 (6)	0 (0)	0 (0)	3 (17)	4 (16)	2 (13)	11 (11)	2 (9)	0 (0)	3 (38)	5 (83)	6 (46)	16 (31)	27 (18)
3	International Trade Center (ITC)	0 (0)	1 (20)	2 (12)	1 (17)	0 (0)	1 (6)	1 (4)	0 (0)	6 (6)	13 (59)	1 (50)	0 (0)	0 (0)	0 (0)	14 (27)	20 (13)
4	Cluster development policy (Super-cluster etc.)	0 (0)	0 (0)	4 (24)	1 (17)	0 (0)	3 (17)	2 (8)	1 (6)	11 (11)	1 (5)	0 (0)	0 (0)	0 (0)	1 (8)	2 (4)	13 (9)
5	Investment incentives for New Growth Engines	0 (0)	0 (0)	0 (0)	0 (0)	1 (20)	2 (11)	1 (4)	2 (13)	6 (6)	3 (14)	0 (0)	0 (0)	1 (17)	0 (0)	4 (8)	10 (7)
6	Special economic zone	0 (0)	1 (20)	0 (0)	0 (0)	0 (0)	0 (0)	1 (4)	0 (0)	2 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (1)
-	Others	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (6)	1 (4)	0 (0)	2 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (1)
Total		6	5	17	6	5	18	25	16	98	22	2	8	6	13	51	149
No. of firms		6	5	17	6	5	18	25	16	98	22	2	8	6	13	51	149 (100)

(3) Requests to improve the investment promotion (incentive) policy

With regard to the requests to improve the investment promotion (incentive) policy (check all that apply), the predominant responses was “Expansion of investment incentives” (49%) followed by “Awareness of details” (44%), “Expansion of target businesses” (44%) and “Streamline the clerical/ accounting work” (27%). (Table 14-3)

(Note) Respondents are firms that replied in Question 14-2 The most interested investment promotion (incentive) policy only.

(Table 14-3) Requests to improve the investment promotion (incentive) policy

Unit: No. of firms and (%)

Ranking		The investment incentive (benefit) scheme that you are most interested in Question 14-2							
		New investment incentive scheme	International Trade Center (ITC)	International Headquarter (IHQ)	Border Special Economic Zone	Cluster development policy (super-cluster etc.)	Investment benefit for new growth engine	Others	Grand total
1	Expansion of investment incentives	39 (57)	7 (39)	9 (39)	1 (50)	7 (58)	2 (22)	1 (50)	66 (49)
2	Awareness of details	32 (46)	6 (33)	9 (39)	2 (100)	4 (33)	6 (67)	1 (50)	60 (44)
2	Expansion of target businesses	34 (49)	7 (39)	6 (26)	1 (50)	5 (42)	6 (67)	1 (50)	60 (44)
4	Streamline the clerical/ accounting work	18 (26)	8 (44)	6 (26)	2 (100)	2 (17)	1 (11)	0 (0)	37 (27)
5	Ease the cost requirement operation	6 (9)	5 (28)	6 (26)	1 (50)	1 (8)	1 (11)	0 (0)	20 (15)
6	Quick enactment/announcement of regulations regarding the Internal Revenue Bureau (taxation) incentives	1 (1)	7 (39)	7 (30)	0 (0)	3 (25)	0 (0)	1 (50)	19 (14)
7	Ease of the capital requirements	9 (13)	3 (17)	5 (22)	0 (0)	0 (0)	0 (0)	1 (50)	18 (13)
8	Deregulation on fixed asset investment	12 (17)	1 (6)	2 (9)	0 (0)	0 (0)	0 (0)	1 (50)	16 (12)
9	Expansion of the target areas	3 (4)	0 (0)	2 (9)	1 (50)	0 (0)	2 (22)	0 (0)	8 (6)
10	Easing of education/ R&D facilities cooperation requirement (Industrial cluster development)	0 (0)	0 (0)	0 (0)	0 (0)	6 (50)	0 (0)	0 (0)	6 (4)
11	Extension of application deadline/ sales recording period etc.	0 (0)	1 (6)	1 (4)	0 (0)	1 (8)	1 (11)	1 (50)	5 (4)
-	Others	0 (0)	0 (0)	1 (4)	0 (0)	0 (0)	0 (0)	0 (0)	1 (1)
Total		154	45	54	8	29	19	7	316
No. of firms		69	18	23	2	12	9	2	135 (100)

15. IMPACT OF THE LOWER OIL PRICE

(1) Impact of the lower oil price on business activities

Regarding impact of the lower oil price on business activities, the responses were “Positive impact” (8%), “Slightly positive impact” (38%), whereas “Negative impact” (3%), “Slightly negative impact” (8%) and “No impact (include offset)” (42%). (Table 15-1)

(Table 15-1) Impact of the lower oil price on business activities

Unit: No. of firms and (%)

Industry		Positive impact	Slightly positive impact	No impact (include offset)	Slightly negative impact	Negative impact	No. of firms
Manufacturing	Food	1 (13)	6 (75)	1 (13)	0 (0)	0 (0)	8
	Textile	1 (8)	9 (75)	1 (8)	1 (8)	0 (0)	12
	Chemical	15 (36)	21 (50)	6 (14)	0 (0)	0 (0)	42
	Steel/Non-ferrous metal	4 (16)	15 (60)	5 (20)	1 (4)	0 (0)	25
	General machinery	0 (0)	6 (100)	0 (0)	0 (0)	0 (0)	6
	Electric/electronic machinery	0 (0)	22 (54)	16 (39)	2 (5)	1 (2)	41
	Transportation machinery	2 (3)	18 (31)	28 (48)	8 (14)	2 (3)	58
	Others	4 (13)	14 (44)	10 (31)	4 (13)	0 (0)	32
Manufacturing sector total		27 (12)	111 (50)	67 (30)	16 (7)	3 (1)	224
Non-manufacturing	Trading	1 (2)	21 (33)	33 (52)	5 (8)	3 (5)	63
	Retail	0 (0)	1 (13)	5 (63)	2 (25)	0 (0)	8
	Finance/ insurance/ securities	1 (6)	0 (0)	13 (81)	2 (13)	0 (0)	16
	Construction/ engineering	0 (0)	9 (28)	19 (59)	2 (6)	2 (6)	32
	Transportation/ communication	6 (19)	8 (26)	11 (35)	4 (13)	2 (6)	31
	Others	0 (0)	12 (25)	31 (65)	4 (8)	1 (2)	48
Non-manufacturing sector total		8 (4)	51 (26)	112 (57)	19 (10)	8 (4)	198
Grand total		35 (8)	162 (38)	179 (42)	35 (8)	11 (3)	422

(2) Impact of the lower oil price on the corporate performance

Regarding the impact of the lower oil price on the corporate performance (check all that apply), the predominant response on positive impact was “Decrease in fuel/ utility costs” (60%) followed by “Decrease in procurement cost for raw material/ intermediate goods” (37%) and “Decrease in logistical costs” (28%) etc. Regarding negative impact, the predominant response was “Decrease in domestic sales (including downward pressure on sales prices)” (23%) followed by “Decrease in exports” (11%). (Table 15-2)

(Table 15-2) Impact of the lower oil price on the corporate performance (Check all that apply)

Unit: No. of firms and (%)

		Manufacturing									Non-manufacturing						Grand total
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electric/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retail	Construction/ engineering	Transportation/ communication	Others	Non-manufacturing sector total	
Positive effect	Decrease in fuel/ utility costs	7 (88)	8 (73)	23 (56)	14 (58)	4 (67)	27 (71)	24 (55)	19 (61)	126 (62)	22 (43)	3 (50)	14 (61)	17 (63)	16 (73)	72 (56)	198 (60)
	Decrease in procurement cost for raw material/ intermediate goods	3 (38)	6 (55)	34 (83)	8 (33)	1 (17)	16 (42)	14 (32)	12 (39)	94 (46)	13 (25)	2 (33)	8 (35)	2 (7)	3 (14)	28 (22)	122 (37)
	Decrease in logistical costs	6 (75)	0 (0)	13 (32)	9 (38)	2 (33)	13 (34)	12 (27)	5 (16)	60 (30)	17 (33)	2 (33)	3 (13)	10 (37)	2 (9)	34 (26)	94 (28)
	Increase in domestic sales	0 (0)	0 (0)	0 (0)	1 (4)	2 (33)	0 (0)	4 (9)	0 (0)	7 (3)	3 (6)	0 (0)	0 (0)	1 (4)	2 (9)	6 (5)	13 (4)
	Increase in exports	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	1 (2)	2 (6)	4 (2)	1 (2)	0 (0)	0 (0)	1 (4)	0 (0)	2 (2)	6 (2)
	Others	0 (0)	0 (0)	1 (2)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (0)	2 (4)	0 (0)	0 (0)	0 (0)	3 (14)	5 (4)	6 (2)
Negative effect	Decrease in domestic sales (including downward pressure on sales prices)	0 (0)	0 (0)	13 (32)	3 (13)	0 (0)	4 (11)	9 (20)	6 (19)	35 (17)	15 (29)	2 (33)	6 (26)	11 (41)	6 (27)	40 (31)	75 (23)
	Decrease in exports	0 (0)	1 (9)	3 (7)	0 (0)	0 (0)	1 (3)	10 (23)	4 (13)	19 (9)	7 (14)	0 (0)	3 (13)	6 (22)	2 (9)	18 (14)	37 (11)
	Loss on valuation on inventory/ assets	0 (0)	1 (9)	5 (12)	0 (0)	0 (0)	0 (0)	2 (5)	2 (6)	10 (5)	5 (10)	0 (0)	2 (9)	0 (0)	0 (0)	7 (5)	17 (5)
	Others	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	2 (5)	1 (2)	0 (0)	3 (1)	2 (4)	0 (0)	1 (4)	1 (4)	5 (23)	9 (7)	12 (4)
Total		16	16	92	35	9	64	77	50	359	87	9	37	49	39	221	580
No. of firms		8	11	41	24	6	38	44	31	203	51	6	23	27	22	129	332 (100)

(3) Effect of the lower oil price on capital investment

Regarding effect of the lower oil price on capital investment, the responses were “No impact” (74%) followed by “Slight decrease” (5%), “Slight increase” (3%) and “Don’t know” (14%). (Table 15-3)

(Table 15-3) Effect of the lower oil price on capital investment

Unit: No. of firms and (%)

Industry		Increase	Slight increase	No impact	Slight decrease	Decrease	Don't know	No. of firms
Manufacturing	Food	0 (0)	2 (22)	6 (67)	0 (0)	0 (0)	1 (11)	9
	Textile	0 (0)	0 (0)	12 (100)	0 (0)	0 (0)	0 (0)	12
	Chemical	0 (0)	4 (9)	32 (74)	3 (7)	1 (2)	3 (7)	43
	Steel/Non-ferrous metal	0 (0)	0 (0)	1 (33)	1 (33)	1 (33)	0 (0)	3
	General machinery	0 (0)	0 (0)	5 (100)	0 (0)	0 (0)	0 (0)	5
	Electric/electronic machinery	0 (0)	2 (4)	36 (80)	3 (7)	0 (0)	4 (9)	45
	Transportation machinery	0 (0)	0 (0)	39 (68)	5 (9)	2 (4)	11 (19)	57
	Others	0 (0)	1 (3)	24 (71)	3 (9)	0 (0)	6 (18)	34
Manufacturing sector total		0 (0)	9 (4)	155 (75)	15 (7)	4 (2)	25 (12)	208
Non-manufacturing	Trading	0 (0)	1 (2)	41 (79)	3 (6)	0 (0)	7 (13)	52
	Retail	0 (0)	0 (0)	6 (67)	0 (0)	0 (0)	3 (33)	9
	Finance/ insurance/ securities	0 (0)	0 (0)	9 (69)	0 (0)	0 (0)	4 (31)	13
	Construction/ engineering	0 (0)	0 (0)	21 (68)	2 (6)	1 (3)	7 (23)	31
	Transportation/ communication	0 (0)	2 (6)	20 (65)	1 (3)	3 (10)	5 (16)	31
	Others	0 (0)	1 (3)	34 (85)	0 (0)	1 (3)	4 (10)	40
	Non-manufacturing sector total	0 (0)	4 (2)	131 (74)	6 (3)	5 (3)	30 (17)	176
Grand total		0 (0)	13 (3)	286 (74)	21 (5)	9 (2)	55 (14)	384

16. EXPECTATION FOR MEASURES BY THE 12 PUBLIC-PRIVATE STEERING COMMITTEES UNDER THE GOVERNMENT'S PRACHA RATH PROJECT

Regarding expectation for measures by the 12 Public-Private Steering Committees under the Government's Pracha Rath Project (check all that apply), the responses were "Revision of the Customs Law (abolition of incentive policies, reduction of penalty etc.)" (58%) followed by "Improvement of the immigration procedures" (40%) and "Policy to support small to medium size enterprises" (18%) etc.

By industry, other main response in non-manufacturing sector was "Improvement of Food and Drug Administration (FDA) procedures" (18%). (Table 16)

(Table 16) Expectation for measures by the 12 Public-Private Steering Committees under the Government's Pracha Rath Project (Check all that apply)

Ranking		Manufacturing									Non-manufacturing						Grand total
		Food	Textile	Chemical	Steel/Non-ferrous metal	General machinery	Electric/electronic machinery	Transportation machinery	Others	Manufacturing sector total	Trading	Retail	Construction/ engineering	Transportation/ communication	Others	Non-manufacturing sector total	
1	Revision of the Customs Law (abolition of reward system , reduction of penalty etc.)	2 (25)	6 (55)	26 (65)	15 (68)	13 (65)	29 (64)	40 (75)	0 (0)	148 (64)	44 (80)	4 (50)	12 (36)	17 (53)	18 (31)	95 (51)	243 (58)
2	Improvement of the Immigration Procedures	2 (25)	4 (36)	16 (40)	9 (41)	4 (20)	19 (42)	15 (28)	0 (0)	75 (32)	31 (56)	3 (38)	15 (45)	16 (50)	26 (44)	91 (49)	166 (40)
3	Policy to support small and medium size enterprises	1 (13)	1 (9)	10 (25)	5 (23)	6 (30)	6 (13)	8 (15)	0 (0)	39 (17)	8 (15)	2 (25)	0 (0)	10 (31)	18 (31)	38 (20)	77 (18)
4	Policy to promote export and investment	0 (0)	4 (36)	3 (8)	4 (18)	2 (10)	9 (20)	14 (26)	0 (0)	38 (16)	13 (24)	0 (0)	5 (15)	3 (9)	7 (12)	28 (15)	66 (16)
5	Industry cluster development/ Creation of new growth engines	0 (0)	1 (9)	6 (15)	2 (9)	5 (25)	7 (16)	9 (17)	0 (0)	31 (13)	11 (20)	0 (0)	5 (15)	5 (16)	11 (19)	32 (17)	63 (15)
6	Improvement of Food and Drug Administration (FDA) procedures	7 (88)	1 (9)	5 (13)	0 (0)	0 (0)	2 (4)	0 (0)	0 (0)	17 (7)	13 (24)	2 (25)	1 (3)	11 (34)	7 (12)	34 (18)	51 (12)
7	Policy to enhance income in the local area (strengthen agriculture, small-to-medium companies, tourism, establishment of social enterprises, etc.)	0 (0)	1 (9)	4 (10)	3 (14)	2 (10)	4 (9)	10 (19)	0 (0)	25 (11)	5 (9)	0 (0)	4 (12)	4 (13)	8 (14)	21 (11)	46 (11)
8	Promotion of PPP (Public Private Partnership) for Public Infrastructure Business	0 (0)	2 (18)	2 (5)	2 (9)	1 (5)	7 (16)	2 (4)	0 (0)	16 (7)	5 (9)	1 (13)	6 (18)	1 (3)	7 (12)	20 (11)	36 (9)
9	Improvement of the Environment Impact Assessment (EIA) and Health Impact Assessment (HIA) procedures	1 (13)	0 (0)	5 (13)	4 (18)	2 (10)	0 (0)	2 (4)	0 (0)	14 (6)	2 (4)	0 (0)	8 (24)	1 (3)	4 (7)	15 (8)	29 (7)
10	Tax reduction for research and development costs	0 (0)	1 (9)	3 (8)	2 (9)	4 (20)	7 (16)	7 (13)	0 (0)	24 (10)	1 (2)	0 (0)	0 (0)	0 (0)	3 (5)	4 (2)	28 (7)
11	Deregulation of laws concerning urban planning and development	0 (0)	1 (9)	2 (5)	1 (5)	1 (5)	3 (7)	1 (2)	0 (0)	9 (4)	5 (9)	0 (0)	9 (27)	1 (3)	3 (5)	18 (10)	27 (6)
12	Policy to promote tourism	0 (0)	0 (0)	1 (3)	0 (0)	0 (0)	0 (0)	2 (4)	0 (0)	3 (1)	2 (4)	0 (0)	0 (0)	3 (9)	7 (12)	12 (6)	15 (4)
13	Establishment of "Science City" as the hub for research and development	0 (0)	0 (0)	0 (0)	0 (0)	1 (5)	0 (0)	2 (4)	0 (0)	5 (2)	2 (4)	0 (0)	1 (3)	0 (0)	2 (3)	5 (3)	10 (2)
14	Policy to support purchase of residential properties	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	3 (7)	1 (2)	0 (0)	4 (2)	0 (0)	0 (0)	3 (9)	0 (0)	2 (3)	5 (3)	9 (2)
-	Others	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	0 (0)	1 (3)	0 (0)	3 (5)	4 (2)	4 (1)
Total		13	22	83	47	41	96	113	0	448	142	12	70	72	126	422	870
No. of firms		8	11	40	22	20	45	53	34	233	55	8	33	32	59	187	420 (100)