

Survey of
Japanese-Affiliated Firms
in Asia and Oceania
(FY 2009 Survey)

March 2010

Overseas Research Department
Japan External Trade Organization (JETRO)

Survey of Japanese-Affiliated Firms in Asia and Oceania (FY 2009 Survey)

JETRO

Foreword

This report summarizes the results of a survey conducted by the Japan External Trade Organization (JETRO) during the period from September through October 2009 of Japanese-affiliated companies operating in Asia and Oceania. This survey has been conducted every year since the first survey in 1987, and this year's (2009) survey marks the 23rd time it has been conducted.

This report consists of the "Overview," comparing side-by-side the state of companies' activities in East Asia by country or region and by industry, and the "Country Reports," which cover in detail the conditions inside each country and region. In order to take an even more comprehensive view of the business activities of Japanese-affiliated firms throughout East Asia, in addition to the 13 nations of the ASEAN, Southwest Asia, and Oceania regions, the "Overview" also includes comparison and analysis of the four countries and regions of Northeast Asia (China, South Korea, Hong Kong, and Taiwan) for which results had been totaled and reported on separately through last year.

Detailed analysis of companies' activities in four countries and regions of Northeast Asia, such as China's business trend by region, are reported on in *Survey of Japanese-Affiliated Firms in Asia and Oceania: China, Hong Kong, Taiwan, South Korea*, a sister volume to this report.

Since at the time it was conducted exactly one year had passed since the financial crisis that began in the United States, this year's survey incorporates questions on subjects such as the practical effects on companies' business activities of the global economic downturn resulting from the financial crisis, countermeasures taken after the crisis, the state of recovery from the crisis, and future expectations for employment and capital investment. These are covered in addition to questions on forecasts of operating profit (business confidence), business problems, future business developments, procurement of raw materials and parts, trends in exports and imports, and use of free trade agreements (FTAs) and economic partnership agreements (EPAs) in the East Asia region, which have been addressed in previous surveys on an ongoing basis.

Finally, we would like to take this opportunity to express our sincere gratitude to all those who took part in this survey. The East Asia region, which has been quick to begin to rebound from the recession and get back on the path to growth amid global economic conditions that remain enveloped in uncertainty about the future, is growing in importance as a source of revenues to Japanese firms. We hope that the results of this survey will be used as a point of reference by companies operating in Asia and Oceania, as well as anyone else who is interested in these regions.

March 2010

Project Team for the Survey of Japanese-Affiliated Firms in
Asia and Oceania
Japan External Trade Organization (JETRO)

Table of Contents

Overview

1. Estimated Operating Profit	2
2. Impact of Economic Recession	4
3. Business Problems	7
4. Investment Environment	10
5. Future Business Development	11
6. Procurement of Raw Materials and Parts	14
7. Measures against New Influenza A (H1N1)	16
8. Exports/Imports	17
9. Average Salary	21

Country Reports

ASEAN

Indonesia	23
Malaysia	33
Myanmar	43
Philippines	51
Singapore	63
Thailand	72
Vietnam	85

Southwest Asia

Bangladesh	98
India	108
Pakistan	118
Sri Lanka	126

Oceania

Australia	134
New Zealand	145

Appendix	155
----------------	-----

Questionnaire	219
---------------------	-----