



Japan External Trade Organization

**FY2016 Survey on the International  
Operations of Japanese Firms  
- JETRO Overseas Business Survey -**

March 8, 2017

Japan External Trade Organization (JETRO)

Overseas Research Department

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# Survey outline and profile of the respondent firms

## Survey outline

### 1. Survey targets

A total of 9,897 firms (headquarters) with interest in overseas business. The FY2016 survey covered 3,546 JETRO member firms plus 6,351 firms using JETRO services.

\*This survey has been conducted annually since FY2002, directed only at JETRO member companies and this year marked its 15th edition. From FY2011, JETRO has expanded the number of subject firms.

### 2. Survey topics

- (1) International Trade
- (2) Overseas Expansion/Future Domestic Business Expansion
- (3) Overseas Expansion (by country/region, by function)
- (4) Utilization of Free Trade Agreements (FTAs)
- (5) International Standardization
- (6) Utilization of Foreign Personnel
- (7) Electronic Commerce (E-commerce)

### 3. Period

November 25, 2016 to January 6, 2017

### 4. Response

Number of valid replies: 2,995 (of which 1,292 are JETRO member firms)

Response rate: 30.3%

## Definitions of large-scale firms, SMEs, etc.

	Manufacturing and other	Wholesale	Retail	Service
Large-scale firms	Firms other than SMEs	Firms other than SMEs	Firms other than SMEs	Firms other than SMEs
Large-scale firms (excluding leading medium-sized firms)	Large-scale firms other than leading medium-sized firms	Large-scale firms other than leading medium-sized firms	Large-scale firms other than leading medium-sized firms	Large-scale firms other than leading medium-sized firms
Leading medium-sized firms	More than 300 million but less than 1 billion yen, or more than 300 but less than 3000 employees	More than 100 million but less than 300 million yen, or more than 100 but less than 1000 employees	More than 50 million but less than 300 million yen, or more than 50 but less than 1000 employees	More than 50 million but less than 300 million yen, or more than 100 but less than 1000 employees
Small and medium-sized enterprises (SMEs)	300 million yen or less, or 300 employees or less	100 million yen or less, or 100 employees or less	50 million yen or less, or 50 employees or less	50 million yen or less, or 100 employees or less
Small and medium-sized enterprises (SMEs) (excluding micro-businesses)	SMEs other than micro-businesses	SMEs other than micro-businesses	SMEs other than micro-businesses	SMEs other than micro-businesses
Micro-businesses	50 million yen or less, or 20 employees or less	10 million yen or less, or 5 employees or less	10 million yen or less, or 5 employees or less	10 million yen or less, or 5 employees or less

Note: The larger categories of "large-scale firms" and "SMEs" are based on the Small and Medium-sized Enterprise Basic Act. The others have been defined by JETRO.

## Profile of respondent firms

	No. of firms	Share (%)
All respondent firms	2,995	100.0
Manufacturing	1,660	55.4
Food & beverages	394	13.2
Textiles/clothing	103	3.4
Wood & wood products/furniture & building materials/paper & pulp	62	2.1
Chemicals	92	3.1
Medical products & cosmetics	59	2.0
Coal & petroleum products/plastics/rubber products	94	3.1
Ceramics/earth & stone	28	0.9
Iron & steel/non-ferrous metals/metal products	168	5.6
General machinery	142	4.7
Electrical equipment	96	3.2
IT equipment/electronic parts & devices	53	1.8
Cars/car parts/other transportation machinery	107	3.6
Precision equipment	70	2.3
Other manufacturing	192	6.4
Non-manufacturing	1,335	44.6
Trade and wholesale	641	21.4
Retail	80	2.7
Construction	90	3.0
Transport	75	2.5
Finance & insurance	77	2.6
Communication, information & software	83	2.8
Professional services	70	2.3
Other non-manufacturing	219	7.3
Large-scale firms	640	21.4
Large-scale firms (excluding leading medium-sized firms)	157	5.2
Leading medium-sized firms	483	16.1
Small and medium-sized enterprises (SMEs)	2,355	78.6
SMEs (excluding micro-businesses)	960	32.1
Micro-businesses	1,395	46.6
Firms with export operations	2,168	72.4
Firms with overseas bases	1,571	52.5
Domestic firms	269	9.0

Note: "Domestic firms" are firms that do not conduct business overseas.

# Profile of respondent firms (export destinations)

Firms with export operations (total, by industry, by firm size)

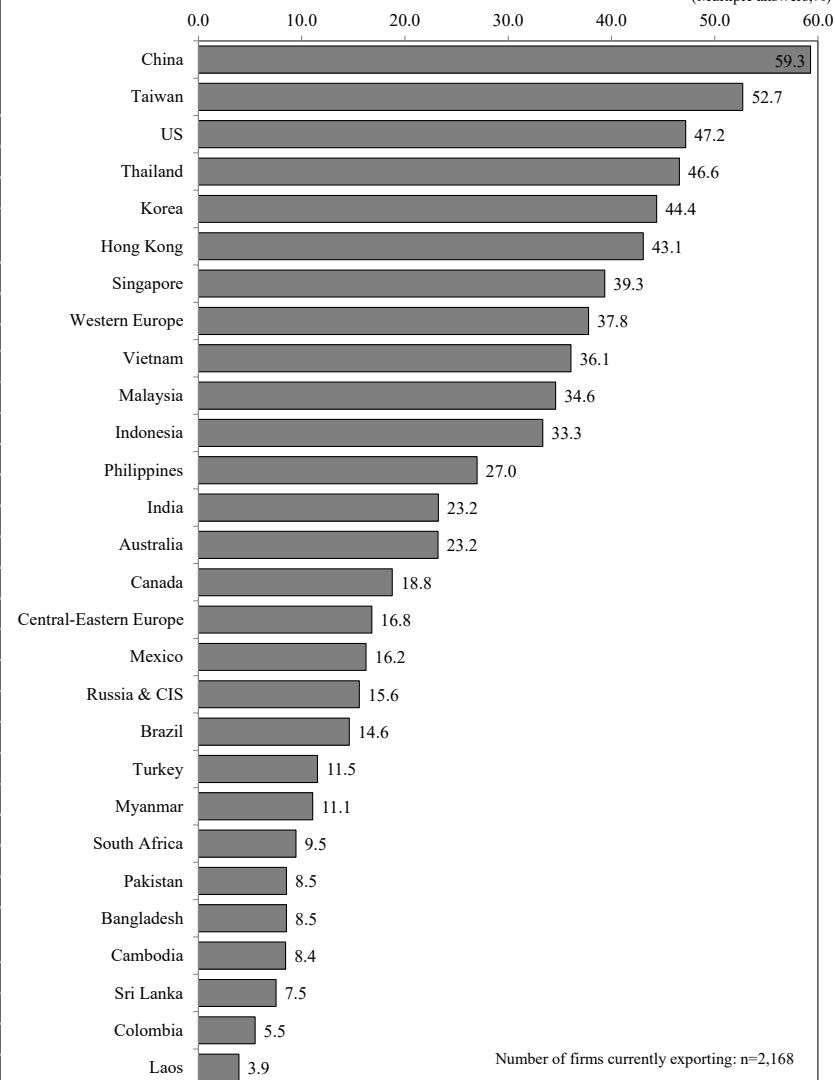
(%)

	Currently exporting	Exports only	Not currently exporting	No answer
All respondent firms (n=2,995)	72.4	23.9	27.1	0.5
Manufacturing (n=1,660)	84.9	29.0	14.8	0.3
Food & beverages (n=394)	80.7	49.7	18.8	0.5
Textiles/clothing (n=103)	74.8	18.4	25.2	0.0
Wood & wood products/furniture & building materials/paper & pulp (n=62)	82.3	27.4	17.7	0.0
Chemicals (n=92)	94.6	19.6	5.4	0.0
Medical products & cosmetics (n=59)	94.9	30.5	5.1	0.0
Coal & petroleum products/plastics/rubber products (n=94)	85.1	23.4	13.8	1.1
Ceramics/earth & stone (n=28)	82.1	28.6	17.9	0.0
Iron & steel/non-ferrous metals/metal products (n=168)	81.0	19.0	19.0	0.0
General machinery (n=142)	88.0	28.2	12.0	0.0
Electrical equipment (n=96)	92.7	21.9	7.3	0.0
IT equipment/electronic parts & devices (n=53)	90.6	15.1	9.4	0.0
Cars/car parts/other transportation machinery (n=107)	90.7	18.7	9.3	0.0
Precision equipment (n=70)	91.4	21.4	7.1	1.4
Other manufacturing (n=192)	82.8	25.0	16.7	0.5
Non-manufacturing (n=1,335)	56.8	17.5	42.5	0.7
Trade and wholesale (n=641)	82.5	18.4	17.5	0.0
Retail (n=80)	50.0	23.8	48.8	1.3
Construction (n=90)	33.3	18.9	65.6	1.1
Transport (n=75)	30.7	10.7	66.7	2.7
Finance & insurance (n=77)	1.3	0.0	97.4	1.3
Communication, information & software (n=83)	42.2	21.7	57.8	0.0
Professional services (n=70)	27.1	14.3	71.4	1.4
Other non-manufacturing (n=219)	37.0	20.1	61.2	1.8
Large-scale firms (n=640)	71.9	10.0	27.7	0.5
Large-scale firms (excluding leading medium-sized firms) (n=157)	71.3	8.9	28.7	0.0
Leading medium-sized firms (n=483)	72.0	10.4	27.3	0.6
Small and medium-sized enterprises (SMEs) (n=2,355)	72.5	27.7	27.0	0.5
SMEs (excluding micro-businesses) (n=960)	72.3	17.8	27.5	0.2
Micro-businesses (n=1,395)	72.7	34.5	26.6	0.7

Notes: 1) Exports include indirect exporting through other firms. 2) "Not currently exporting" refers to firms other than firms with export operations and firms with no answer.

Export destinations of exporting firms

(Multiple answers,%)



# Profile of respondent firms (status of overseas expansion)

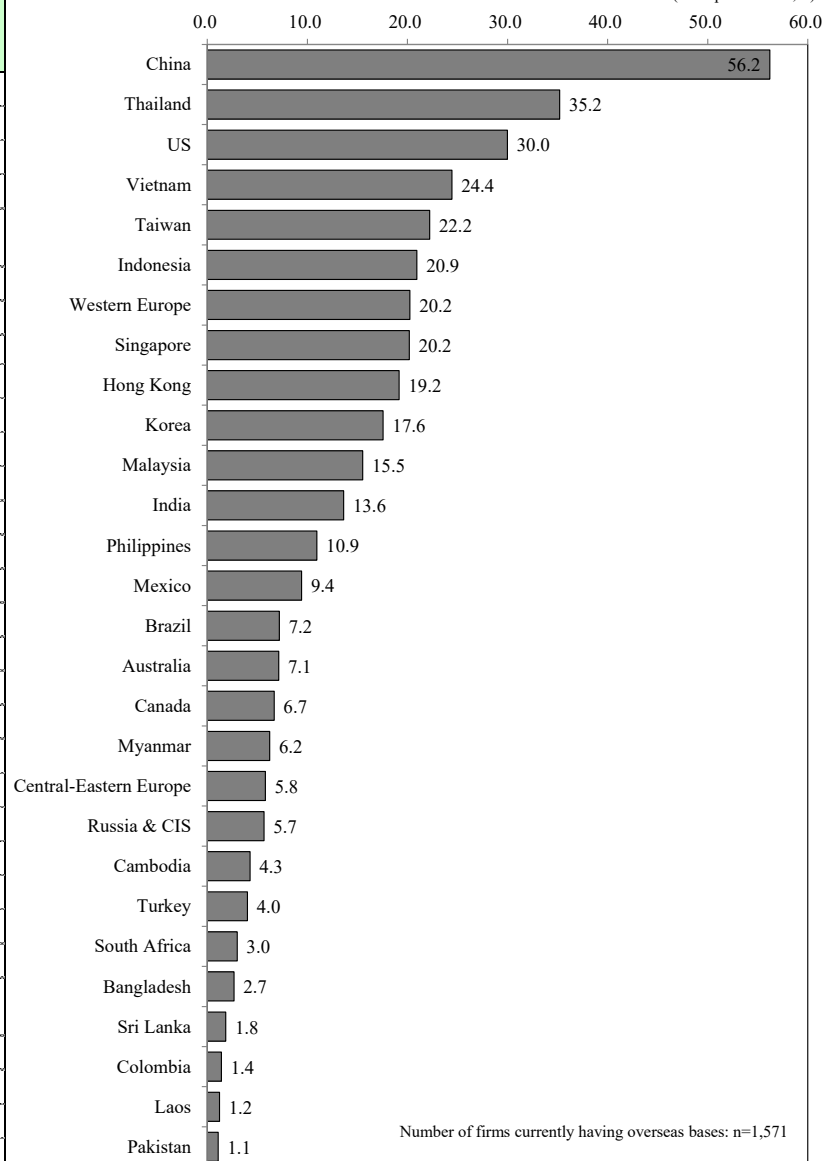
Firms with overseas bases (total, by industry, by firm size)

(%)

	With overseas bases	Without overseas bases	No answer
Total (n=2,995)	52.5	47.5	0.0
Manufacturing (n=1,660)	54.1	45.9	0.0
Food & beverages (n=394)	27.2	72.8	0.0
Textiles/clothing (n=103)	52.4	47.6	0.0
Wood & wood products/furniture & building materials/paper & pulp (n=62)	40.3	59.7	0.0
Chemicals (n=92)	72.8	27.2	0.0
Medical products & cosmetics (n=59)	42.4	57.6	0.0
Coal & petroleum products/plastics/rubber products (n=94)	63.8	36.2	0.0
Ceramics/earth & stone (n=28)	53.6	46.4	0.0
Iron & steel/non-ferrous metals/metal products (n=168)	61.3	38.7	0.0
General machinery (n=142)	64.1	35.9	0.0
Electrical equipment (n=96)	69.8	30.2	0.0
IT equipment/electronic parts & devices (n=53)	66.0	34.0	0.0
Cars/car parts/other transportation machinery (n=107)	82.2	17.8	0.0
Precision equipment (n=70)	77.1	22.9	0.0
Other manufacturing (n=192)	55.7	44.3	0.0
Non-manufacturing (n=1,335)	50.4	49.6	0.0
Trade and wholesale (n=641)	49.9	50.1	0.0
Retail (n=80)	50.0	50.0	0.0
Construction (n=90)	55.6	44.4	0.0
Transport (n=75)	62.7	37.3	0.0
Finance & insurance (n=77)	49.4	50.6	0.0
Communication, information & software (n=83)	55.4	44.6	0.0
Professional services (n=70)	44.3	55.7	0.0
Other non-manufacturing (n=219)	46.1	53.9	0.0
Large-scale firms (n=640)	82.7	17.3	0.0
Large-scale firms (excluding leading medium-sized firms) (n=157)	94.9	5.1	0.0
Leading medium-sized firms (n=483)	78.7	21.3	0.0
Small and medium-sized enterprises (SMEs) (n=2,355)	44.2	55.8	0.0
SMEs (excluding micro-businesses) (n=960)	56.0	44.0	0.0
Micro-businesses (n=1,395)	36.1	63.9	0.0

Country and region of overseas bases

(Multiple answers,%)



# Profile of respondent firms (overseas ratios of sales and operating profits)

## ■ Firms with overseas sales ratio of “1-20%” make up largest portion

Firms with an overseas sales ratio of “1-20%” make up the highest percentage (36.7%). Firms with an overseas sales ratio of 61% or more, exceeded 10% in electrical equipment (12.5%), IT equipment/electronic parts & devices (17.0%), cars/car parts/other transportation machinery (15.0%), precision equipment (12.9%), and trade and wholesale (16.8%).

Regarding the overseas ratio of operating profits, 27.8% of the respondents answered “1-20%.” The percentage of firms answering “21-60%” was 22.6% in IT equipment, electronic parts and devices, while more than 10% responded “61-100%” in cars, car parts and other transportation machinery, precision equipment and trade and wholesale.

## Overseas ratios of sales and operating profits in FY2015 (total, by industry, by firm size)

	Overseas sales ratio					Overseas ratio of operating profits					(%)
	Less than 1%	1 - 20%	21 - 60%	61 - 100%	No answer	Less than 1%	1 - 20%	21 - 60%	61 - 100%	No answer	
All respondent firms (n=2,995)	21.1	36.7	14.7	7.6	19.8	22.3	27.8	9.5	6.9	33.6	
Manufacturing (n=1,660)	18.0	41.0	18.8	5.8	16.4	18.6	31.3	11.2	4.8	34.1	
Food & beverages (n=394)	28.7	45.7	4.8	1.0	19.8	26.1	34.0	3.6	1.5	34.8	
Textiles/clothing (n=103)	27.2	37.9	14.6	3.9	16.5	26.2	34.0	7.8	3.9	28.2	
Wood & wood products/furniture & building materials/paper & pulp (n=62)	21.0	48.4	12.9	4.8	12.9	27.4	32.3	8.1	6.5	25.8	
Chemicals (n=92)	9.8	34.8	39.1	2.2	14.1	9.8	30.4	21.7	3.3	34.8	
Medical products & cosmetics (n=59)	10.2	45.8	15.3	1.7	27.1	10.2	33.9	6.8	5.1	44.1	
Coal & petroleum products/plastics/rubber products (n=94)	14.9	40.4	19.1	6.4	19.1	19.1	27.7	13.8	9.6	29.8	
Ceramics/earth & stone (n=28)	14.3	60.7	14.3	3.6	7.1	10.7	46.4	10.7	0.0	32.1	
Iron & steel/non-ferrous metals/metal products (n=168)	20.8	41.1	16.7	4.8	16.7	22.0	30.4	9.5	2.4	35.7	
General machinery (n=142)	7.7	48.6	25.4	9.2	9.2	10.6	33.8	14.8	6.3	34.5	
Electrical equipment (n=96)	9.4	36.5	27.1	12.5	14.6	11.5	31.3	10.4	5.2	41.7	
IT equipment/electronic parts & devices (n=53)	11.3	30.2	30.2	17.0	11.3	13.2	18.9	22.6	9.4	35.8	
Cars/car parts/other transportation machinery (n=107)	8.4	25.2	37.4	15.0	14.0	13.1	20.6	19.6	14.0	32.7	
Precision equipment (n=70)	10.0	28.6	31.4	12.9	17.1	8.6	22.9	18.6	10.0	40.0	
Other manufacturing (n=192)	17.7	42.2	18.2	4.7	17.2	18.8	34.4	13.5	3.1	30.2	
Non-manufacturing (n=1,335)	25.0	31.5	9.7	9.8	24.0	26.8	23.4	7.3	9.5	32.9	
Trade and wholesale (n=641)	16.8	36.2	14.2	16.8	15.9	17.2	29.2	10.9	16.7	26.1	
Retail (n=80)	27.5	41.3	6.3	3.8	21.3	30.0	26.3	7.5	2.5	33.8	
Construction (n=90)	30.0	26.7	10.0	3.3	30.0	35.6	20.0	6.7	3.3	34.4	
Transport (n=75)	33.3	18.7	13.3	6.7	28.0	37.3	12.0	12.0	6.7	32.0	
Finance & insurance (n=77)	49.4	3.9	0.0	0.0	46.8	48.1	3.9	0.0	0.0	48.1	
Communication, information & software (n=83)	31.3	28.9	2.4	1.2	36.1	31.3	22.9	0.0	1.2	44.6	
Professional services (n=70)	34.3	31.4	8.6	7.1	18.6	40.0	21.4	4.3	7.1	27.1	
Other non-manufacturing (n=219)	29.2	31.1	2.7	2.7	34.2	33.3	18.7	1.8	1.8	44.3	
Large-scale firms (n=640)	13.9	33.3	24.4	8.4	20.0	16.3	23.1	12.7	5.9	42.0	
Large-scale firms (excluding leading medium-sized firms)(n=157)	9.6	20.4	31.2	14.6	24.2	13.4	11.5	10.8	6.4	58.0	
Leading medium-sized firms (n=483)	15.3	37.5	22.2	6.4	18.6	17.2	26.9	13.3	5.8	36.9	
Small and medium-sized enterprises (SMEs) (n=2,355)	23.1	37.7	12.1	7.4	19.8	23.9	29.0	8.6	7.2	31.3	
SMEs (excluding micro-businesses) (n=960)	19.2	37.4	15.2	8.3	19.9	20.5	27.7	10.4	8.8	32.6	
Micro-businesses (n=1,395)	25.7	37.8	10.0	6.7	19.7	26.2	30.0	7.4	6.1	30.3	

Note: Highlighted cells indicate items chosen by the largest number of firms, excluding firms with no answer. Cells encircled red indicate industries where firms whose overseas sales ratio or overseas ratio of operating profits is 60% or more account for 10% or more of the total number of firms in the industry.

# **1. International trade**

- Motivation to expand exports remains high -

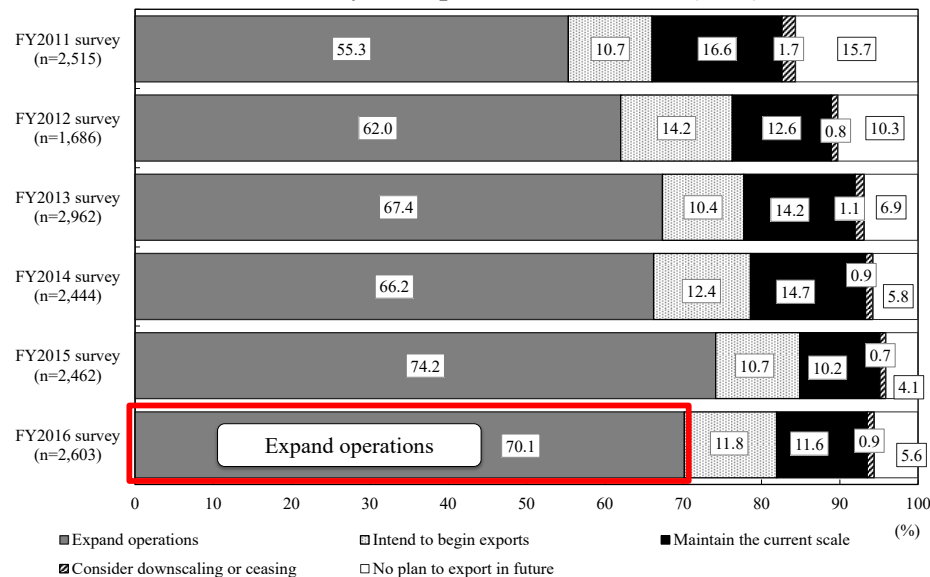
# International trade: Future export plans

## ■ Motivation to expand exports remains high

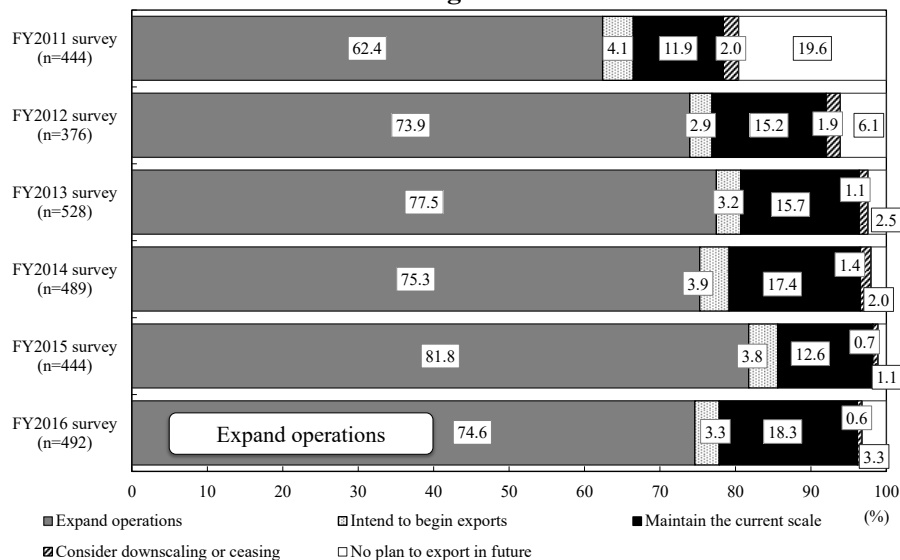
Regarding export policies over the next three years or so, the percentage of firms “planning to expand exports” slightly decreased to 70.1% from 74.2% the previous year, but remains at a high level. When adding those “intending to begin exports” (11.8%), the percentage of firms expressing high motivation to expand exports reaches 81.9%.

By firm size, 74.6% of large-scale firms intend to expand exports. The percentage of SMEs intending to do so reached 69.1%. By type of industry, 86.4% intend to expand exports in “medical products and cosmetics,” followed by 84.0% in “ceramics, earth and stone” and 81.9% in “electrical equipment.”

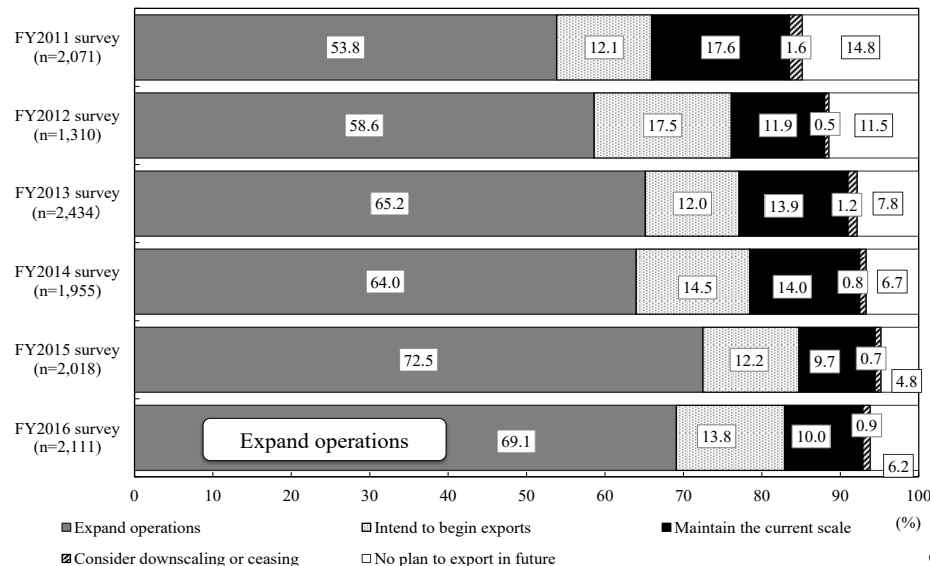
## Policy on exports for the future (total)



## Large-scale firms



## SMEs



# International trade: Future export plans

## Policy on exports for the future (by industry)

(%)

	Number of firms	Conducting export operations now and intending to expand them	Not conducting export operations now, but intending to begin exports	Conducting export operations now and maintaining the current scale	Conducting export operations now, but considering downscaling or ceasing	Neither conducting export operations now nor intending to export in future
Total	2,603	70.1	11.8	11.6	0.9	5.6
Manufacturing	1,607	73.2	8.7	13.2	0.8	4.0
Food & beverages	385	76.1	13.8	6.0	0.5	3.6
Textiles/clothing	94	63.8	16.0	10.6	2.1	7.4
Wood & wood products/furniture & building materials/paper & pulp	60	76.7	10.0	6.7	1.7	5.0
Chemicals	89	78.7	3.4	18.0	0.0	0.0
Medical products & cosmetics	59	86.4	1.7	8.5	0.0	3.4
Coal & petroleum products/plastics/rubber products	90	60.0	6.7	26.7	1.1	5.6
Ceramics/earth & stone	25	84.0	4.0	8.0	0.0	4.0
Iron & steel/non-ferrous metals/metal products	162	63.6	9.9	19.1	1.2	6.2
General machinery	139	77.0	5.0	12.2	2.2	3.6
Electrical equipment	94	81.9	5.3	11.7	0.0	1.1
IT equipment/electronic parts & devices	51	76.5	2.0	13.7	0.0	7.8
Cars/car parts/other transportation machinery	105	58.1	3.8	34.3	1.9	1.9
Precision equipment	69	78.3	5.8	14.5	0.0	1.4
Other manufacturing	185	76.2	9.7	8.6	0.0	5.4
Non-manufacturing	996	65.2	16.8	8.9	1.0	8.1
Trade and wholesale	619	76.1	9.2	7.4	1.0	6.3
Retail	70	45.7	31.4	8.6	4.3	10.0
Construction	55	40.0	18.2	16.4	1.8	23.6
Transport	26	73.1	11.5	11.5	0.0	3.8
Communication, information & software	61	41.0	34.4	13.1	0.0	11.5
Professional services	31	54.8	25.8	9.7	0.0	9.7
Other non-manufacturing	130	47.7	35.4	10.8	0.0	6.2

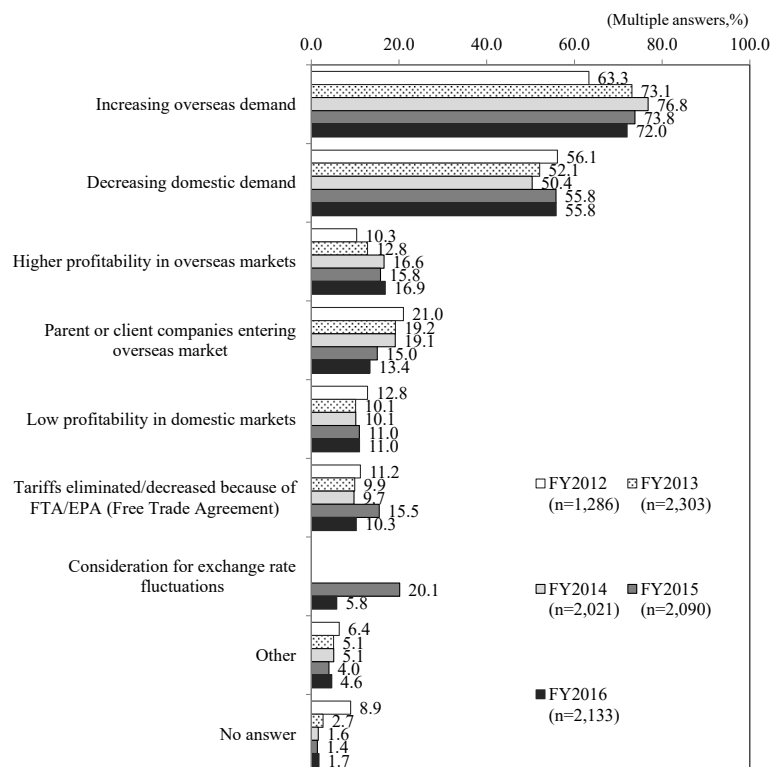
Note: Highlighted cells indicate that the response rate is 80% or more. The table only shows the industries where the number of respondent firms is 10 or more

# International trade: Reasons for expanding export operations

## Biggest reason for international trade efforts continues to be increasing overseas demand

Among the reasons for this positive stance, “increased overseas demand” ranked first (72.0%), but the percentage of firms choosing this answer has decreased for two consecutive years. The second and third biggest reasons were “decreasing domestic demand” (55.8%) and “higher profitability in overseas markets” (16.9%). Regarding large-scale firms, the percentage of those choosing “parent or client companies entering overseas markets” is larger than the percentage of those choosing “higher profitability in overseas markets.”

Reasons for expanding export operations  
(total, comparison over time)



Note: 1) Percentages to the total number of firms answering “planning to expand exports” or “intending to begin exports.” 2) “Consideration for exchange rate fluctuations” was added in FY2015 (which was expressed as “increasing price competitiveness because of yen depreciation” in FY2015)

By firm size (total, by firm size, by industry)

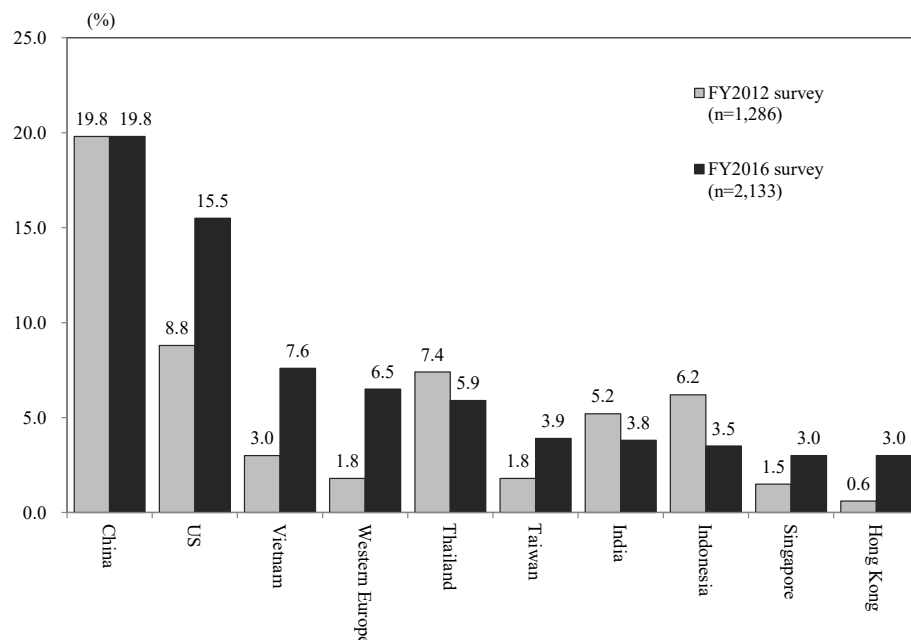
	Total (n=2,133)	By firm size		By industry	
		Large-scale firms (n=383)	SMEs (n=1,750)	Manufacturing (n=1,317)	Non-manufacturing (n=816)
Increasing overseas demand	72.0	82.0	69.8	73.5	69.6
Decreasing domestic demand	55.8	64.0	54.1	59.4	50.1
Higher profitability in overseas markets	16.9	12.3	17.9	14.2	21.2
Parent or client companies entering overseas market	13.4	28.7	10.0	11.8	15.8
Low profitability in domestic markets	11.0	8.9	11.4	9.0	14.1
Tariffs eliminated/decreased due to free trade agreements	10.3	11.5	10.0	10.6	9.8
Consideration of exchange rate fluctuations	5.8	6.5	5.7	4.2	8.5
Other	4.6	3.1	5.0	4.0	5.6
No answer	1.7	0.8	1.9	1.7	1.8

# International trade: Export target countries and regions in the future

## ■ US, Vietnam and Western Europe rising as most important export targets

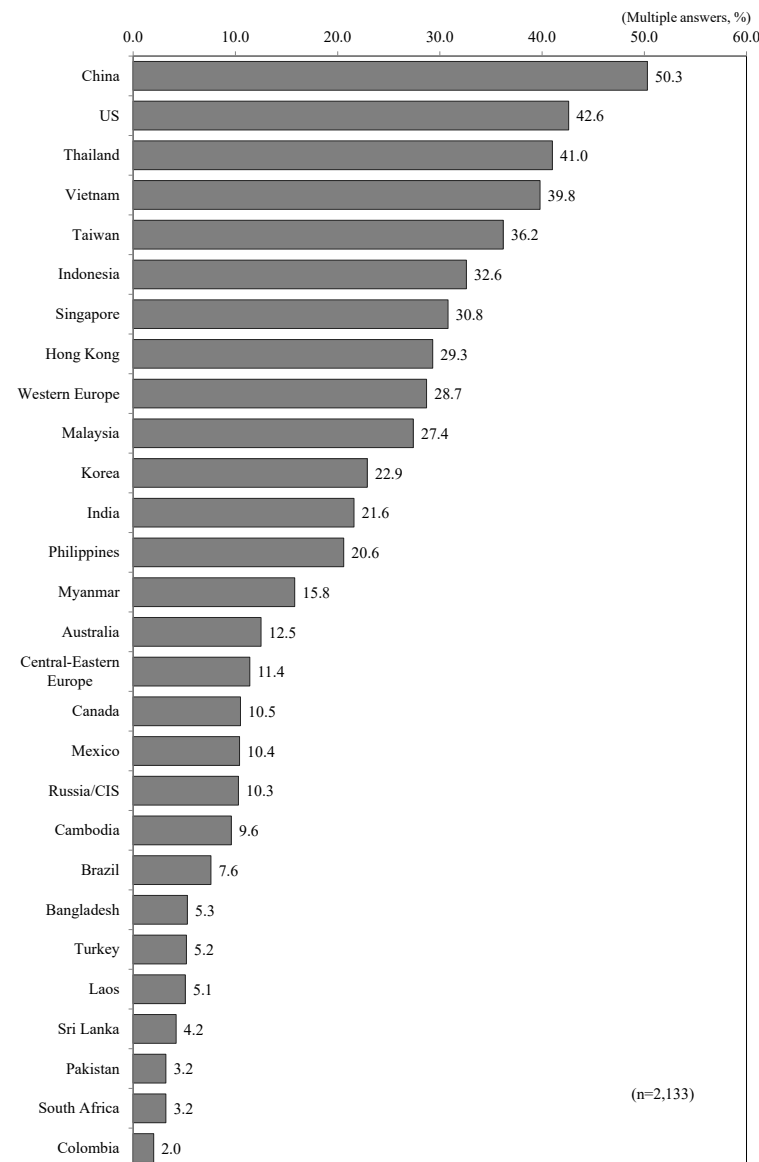
The largest number of companies are planning to expand exports or begin exports to China (50.3%), followed by the US (42.6%) and Thailand (41.0%). Regarding the most important export target, 19.8% of the respondent companies chose China, followed by the US (15.5%) and Vietnam (7.6%). Compared with the FY2012 survey, the percentage of firms choosing the US, Vietnam and Western European countries as the most important export destination greatly increased, while the percentage of those choosing Thailand, India and Indonesia decreased.

### Most important export target countries and regions in the future



Note: 1) Percentages to the total number of firms answering “planning to expand exports” or “intending to begin exports.” 2) The top ten countries and regions that gained higher percentages concerning the question about “most important export target” in the FY2016 survey. 3) Poland, Hungary, Czech, Slovakia, Slovenia, Croatia, Rumania, Bulgaria and the three Baltic states are excluded from Western Europe.

### Export target countries and regions in the future



Note: Percentages of firms answering “planning to expand exports” or “intending to begin exports” compared to the total.

## **2. Overseas expansion, future domestic business expansion**

Intention to expand business overseas increases and  
percentage of firms intending to expand domestic business  
reaches highest ever

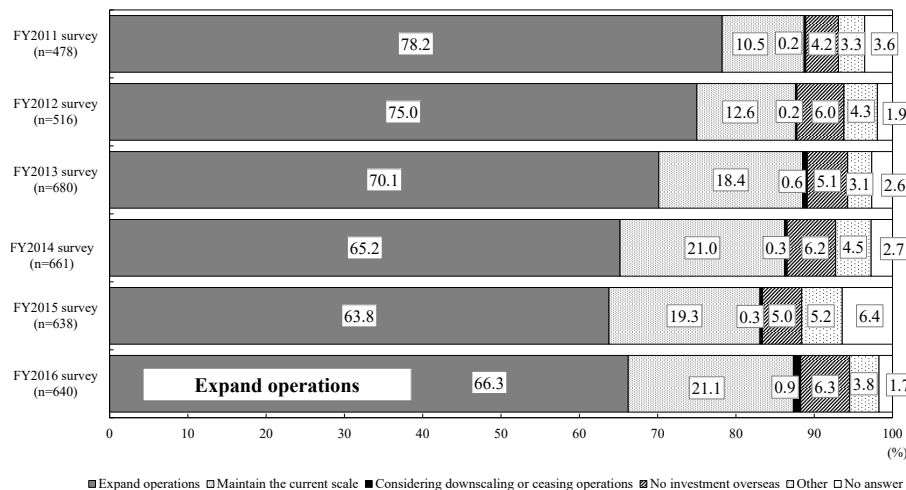
# Overseas expansion: Future overseas expansion policy

## ■ Increase seen in intention to expand business overseas

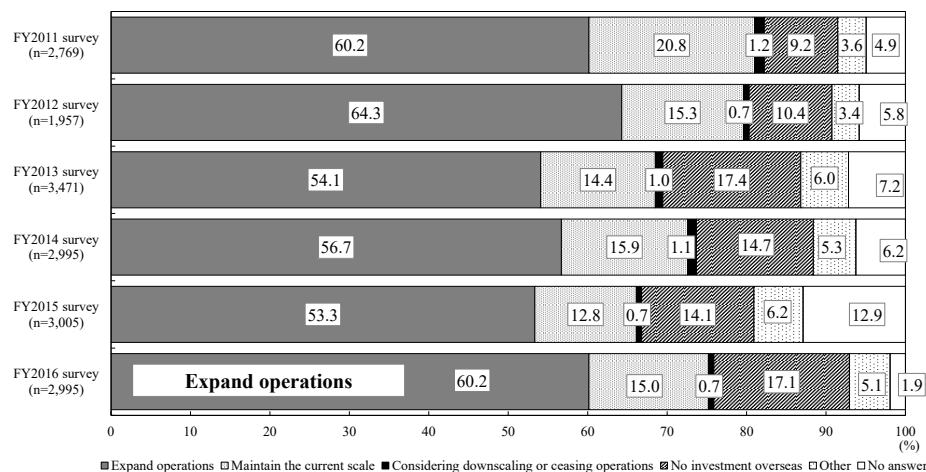
When asked about future overseas expansion policies (over the next three years or so), the percentage of firms answering “expand operations” was 60.2%, increasing from the previous year’s survey (53.3%). This percentage exceeded the 60% mark after an interval of four years.

By firm size, 66.3% of large-scale firms answered “expand operations,” turning to increase after the downward trend from FY2012. The percentage of SMEs answering “expand operations” increased from 50.5% in the previous year to 58.5%. By industry, intention to expand business overseas has been increasing in retail (77.5%); medical products and cosmetics (69.5%); electrical equipment (68.7%); communication, information and software (68.7%); and cars, car parts and other transportation machinery (66.4%).

### Large-scale firms

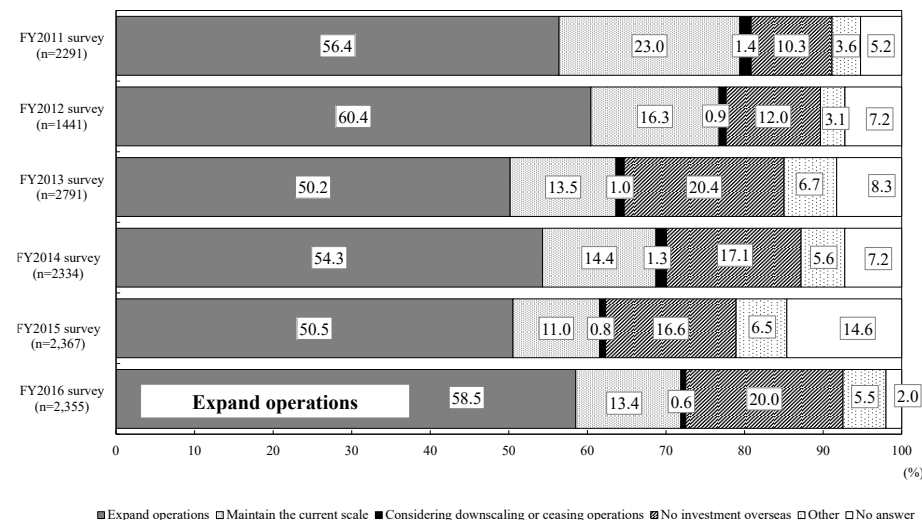


### Future overseas expansion policy (total)



Note: Since the FY2013 survey, “expand operations” has included respondents reporting that they currently have overseas bases and are planning to expand them further in the future and those reporting that they currently have no overseas bases but intend to invest in the future.

### SMEs

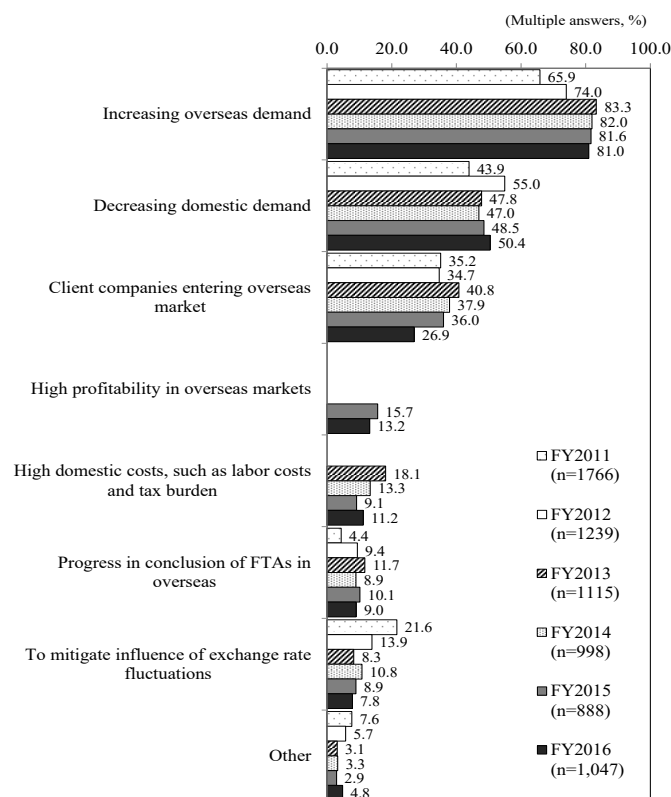


# Reasons for expanding overseas operations

## ■ Biggest reason to keep up with changes in overseas and domestic demand

As a reason for expanding overseas operations, 81.0% of the respondent firms answered “increasing overseas demand.” The percentage of those choosing this answer has been over 80% for four consecutive years. The second largest percentage of firms answered “decreasing domestic demand” (50.4%). At the same time, the percentage of firms answering “client companies entering overseas markets” decreased to 26.9%. The percentage of firms answering “to mitigate influence of exchange rate fluctuations” has gradually decreased.

Reasons for expanding overseas operations  
(total, comparison over time)



Reasons for expanding overseas operations (total, by firm size, by industry)

(Multiple answers, %)

	Total (n=1,047)	By firm size		By industry	
		Large-scale firms (n=374)	SMEs (n=673)	Manufacturing (n=595)	Non-manufacturing (n=452)
Increasing overseas demand	81.0	88.0	77.1	81.8	79.9
Decreasing domestic demand	50.4	57.2	46.7	53.8	46.0
Client companies entering overseas market	26.9	36.9	21.4	25.4	29.0
High profitability in overseas markets	13.2	12.0	13.8	11.3	15.7
High domestic costs, such as labor costs and tax burden	11.2	10.7	11.4	12.6	9.3
Progress in conclusion of FTAs in overseas	9.0	9.9	8.5	10.1	7.5
To mitigate influence of exchange rate fluctuations	7.8	8.8	7.3	8.9	6.4
Other	4.8	2.7	5.9	3.9	6.0

Note: 1) The number in FY2011 and FY2012 indicates the number of firms answering that they intend to begin and expand overseas operations after excluding the number of firms which gave no answer regarding reasons to expand. The number in FY2013 and thereafter indicates the number of firms “intending to expand overseas operations” after excluding the number of firms which gave no answer regarding reasons to expand. 2) For comparison with past years, results in answers to “influence of yen appreciation” in the FY2011 and FY2012 surveys are labeled here as “to mitigate influence of exchange rate fluctuations”. 3) “High profitability in overseas markets” is an item added in FY2015 and “High domestic costs, such as labor costs and tax burden” is an item added in FY2013.

# Domestic business: Future domestic business expansion

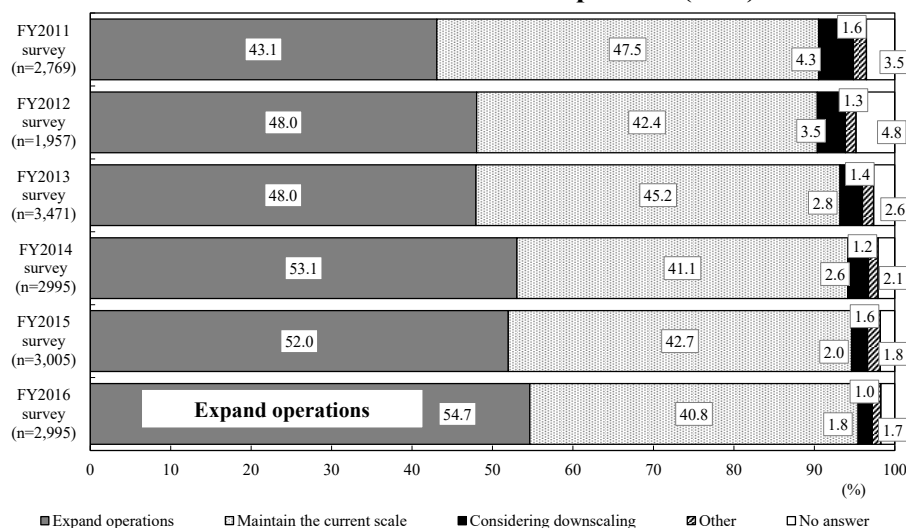
## Percentage of companies intending to expand domestic business becomes highest ever

Regarding domestic business expansion policies in the future (the next three years or so), the percentage of firms answering “expand operations” increased to 54.7% from 52.0% in the previous year, the highest percentage since FY2011, the first year when comparable figures were compiled.

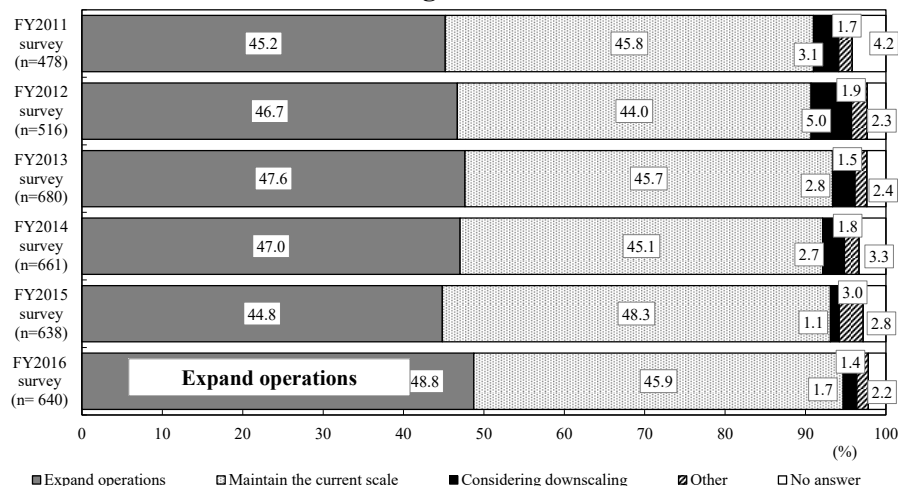
The percentage of large-scale companies and SMEs answering “expand operations” increased to 48.8% and 56.3%, respectively, over the previous year. More than half the SMEs have chosen this answer for three consecutive years.

By industry, the intention to expand operations increased in communication; information and software (74.7%); medical products and cosmetics (72.9%); professional services (67.1%); food and beverages (61.4%) and retail (61.3%).

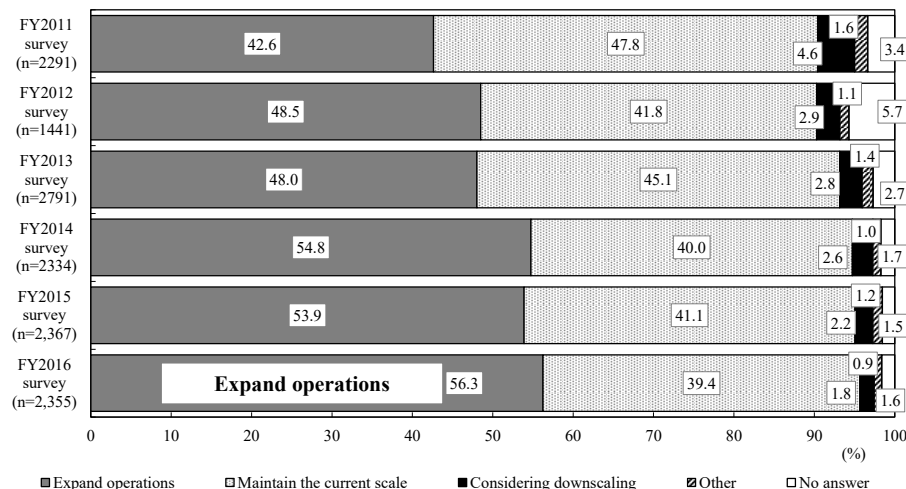
## Future domestic business expansion (total)



## Large-scale firms



## SMEs



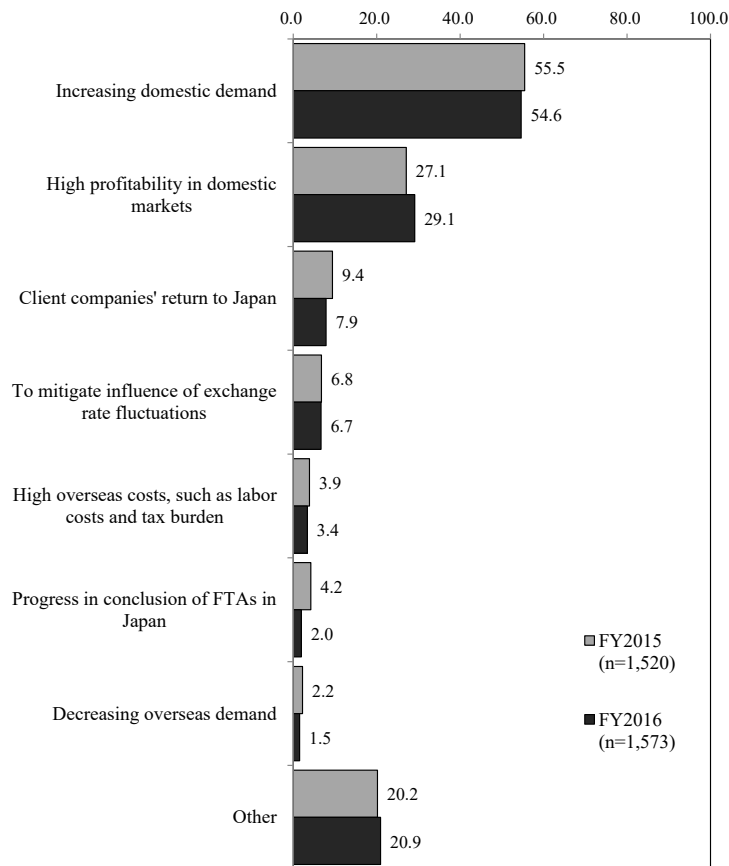
# Reasons for expanding domestic business

## Increased domestic demand biggest reason

As a reason for expanding domestic business, more than half of the respondent firms (54.6%) answered “increasing domestic demand” as in the previous year, followed by those answering “high profitability in domestic markets” (29.1%). The percentage of firms answering each of the other reasons was less than 10%.

Reasons for expanding domestic business  
(total, comparison over time)

(Multiple answers, %)



Reasons for expanding domestic business (total, by firm size, by industry)

(Multiple answers, %)

	Total (n=1,573)	By firm size		By industry	
		Large-scale firms (n=297)	SMEs (n=1,276)	Manufacturing (n=868)	Non-manufacturing (n=705)
Increasing domestic demand	54.6	52.2	55.2	55.6	53.3
High profitability in domestic markets	29.1	25.9	29.9	30.9	27.0
Client companies' return to Japan	7.9	8.1	7.8	8.4	7.2
To mitigate influence of exchange rate fluctuations	6.7	8.4	6.3	6.6	6.8
High overseas costs, such as labor costs and tax burden	3.4	2.7	3.5	3.9	2.7
Progress in conclusion of FTAs in Japan	2.0	2.4	1.9	2.1	1.8
Decreasing overseas demand	1.5	1.0	1.6	2.0	1.0
Other	20.9	23.6	20.3	20.3	21.7

Note: Each total number indicates the number of firms “intending to expand operations” after excluding the number of firms which gave no answer regarding reasons to expand.

### **3. Overseas expansion (By country/region, functions)**

Vietnam shows growth in motivation to expand business for two consecutive years, while Mexico shows decline in motivation mainly in manufacturing industries

# Overseas expansion by country and region (time-series comparison)

■ Vietnam shows growth in motivation to expand business for two consecutive years. China and Thailand still popular destinations, but declining.

A high percentage of the firms answering that they "currently have an overseas base and are planning to expand" chose China (52.3%, compared to 53.7% in the previous year) or Thailand (38.6%, from 41.7%) as target countries or regions for their expansion, but the percentage of firms choosing either continues to decrease. The percentage of firms choosing Vietnam increased for the second consecutive year (34.1%, from 32.4%) and became the third largest, followed by the US (33.5%, from 33.7%).

Overseas expansion by country and region (top 20 countries and regions)

(Multiple answers, %)

Country/region	FY2016		FY2015		FY2014		FY2013	FY2012	FY2011
	(n=992)	Rank	(n=895)	Rank	(n=1,001)	Rank	(n=1,119)	(n=1,149)	(n=1,602)
China	52.3	(1)	53.7	(1)	56.5	(1)	56.9	59.2	67.9
Thailand	38.6	(2)	41.7	(2)	44.0	(2)	47.0	41.2	27.9
Vietnam	34.1	(3)	32.4	(4)	28.7	(5)	29.6	25.9	20.3
US	33.5	(4)	33.7	(3)	31.3	(4)	25.4	26.0	21.1
Indonesia	26.8	(5)	31.8	(5)	34.4	(3)	35.0	32.0	24.7
Taiwan	20.6	(6)	21.6	(6)	21.0	(6)	20.0	21.8	18.5
Western Europe	19.7	(7)	20.6	(7)	18.1	(8)	15.7	15.9	15.7
India	18.5	(8)	20.1	(8)	16.1	(9)	19.2	19.4	21.8
Singapore	17.7	(9)	16.1	(10)	19.3	(7)	18.3	17.8	14.0
Korea	15.0	(10)	16.5	(9)	15.9	(11)	17.2	18.8	18.8
Malaysia	14.7	(11)	15.5	(11)	14.8	(12)	15.4	15.7	12.2
Hong Kong	14.1	(12)	14.2	(12)	16.1	(9)	15.4	15.8	14.2
Philippines	13.4	(13)	11.3	(14)	10.8	(13)	10.9	7.5	5.1
Myanmar	12.7	(14)	11.5	(13)	10.1	(14)	10.9	-	-
Mexico	8.5	(15)	10.9	(15)	10.1	(14)	7.6	5.6	3.1
Central-Eastern Europe	5.9	(16)	7.0	(16)	6.1	(18)	3.3	4.2	4.7
Cambodia	5.2	(17)	6.0	(17)	5.3	(19)	5.4	-	-
Russia/CIS	4.9	(18)	4.1	(20)	6.2	(17)	6.5	5.8	6.9
Australia	4.6	(19)	4.6	(19)	2.8	(21)	3.3	3.7	4.0
Bangladesh	3.8	(20)	2.6	(23)	2.6	(22)	2.9	-	-
ASEAN 6	70.5		73.2		73.5		74.8	69.0	56.3

Notes: 1) The numbers in FY2011 and FY2012 indicate the number of firms answering that they "intend to begin and expand overseas operations" after excluding the number of firms which gave no answer on functions planned to be expanded. The numbers in FY2013 and thereafter indicate the number of firms "intending to expand overseas operations" after excluding the number of firms which gave no answer on functions planned to be expanded. 2) No country breakdown for Western Europe, Russia & CIS and Central-Eastern Europe. Myanmar and Cambodia were not covered by the surveys before FY2013. 3) ASEAN 6 refers to the total for the six countries of Singapore, Thailand, Malaysia, Indonesia, the Philippines, and Vietnam (excluding duplication).

# Overseas expansion by country and region (time-series comparison)

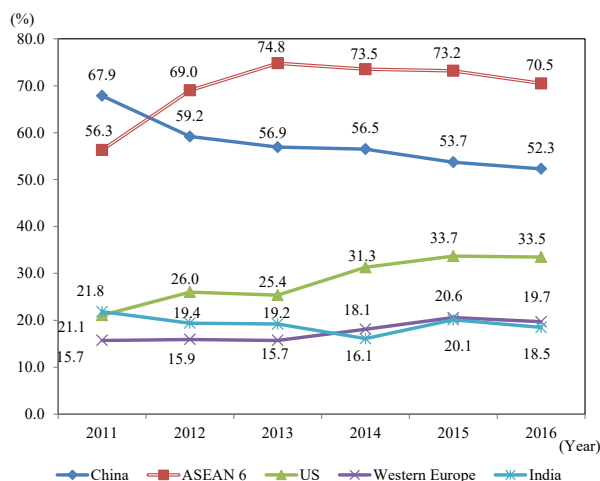
## ASEAN 6 exceeded China for fifth consecutive year. However, gaps exist within ASEAN.

As the target country or region for overseas expansion, ASEAN-6 (70.5%) exceeded China (52.3%) for the fifth consecutive year. Within ASEAN-6, Indonesia showed a decrease (5th place at 26.8%, from 31.8% in the previous year) in addition to Thailand, while the Philippines showed an increase (13th place at 13.4%, from 11.3%) in addition to Vietnam. The percentage of manufacturers intending to expand business in the US has also been increasing (41.9%, from 40.7%).

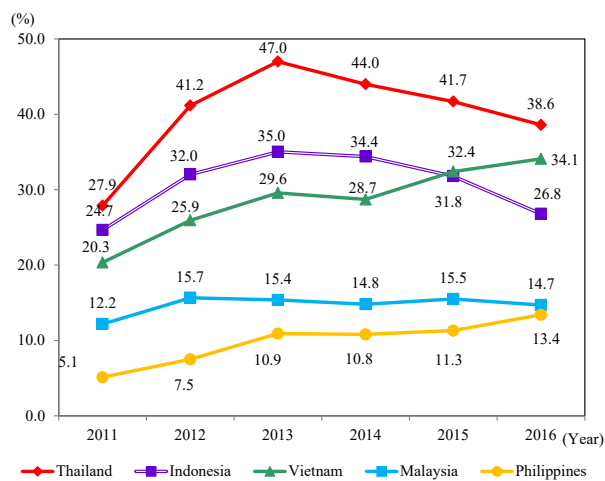
## Mexico shows decline in motivation mainly in manufacturing industries

Regarding the other emerging markets, a decline was seen in the percentage of firms intending to expand business in Mexico (15th place at 8.5%, from 10.9%), Brazil (21st place at 3.4%, from 5.1%) and Turkey (23rd place at 1.7%, from 3.4%). A conspicuous decrease was shown among manufacturers intending to expand business in Mexico (10.2%, from 14.4%). Meanwhile, an upward trend is seen in the percentage of firms intending to expand business in Russia and CIS (18th place at 4.9% from 4.1%).

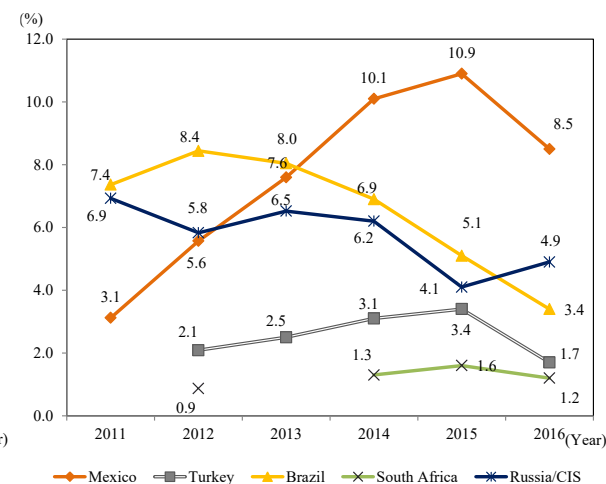
Main countries/regions (total)



Emerging markets in Asia (total)



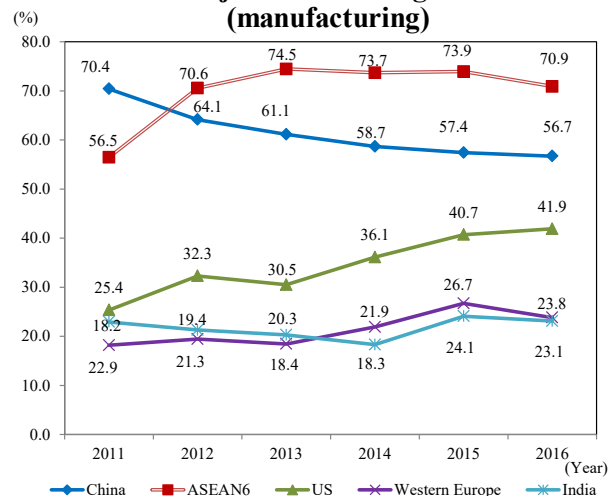
Other emerging markets (total)



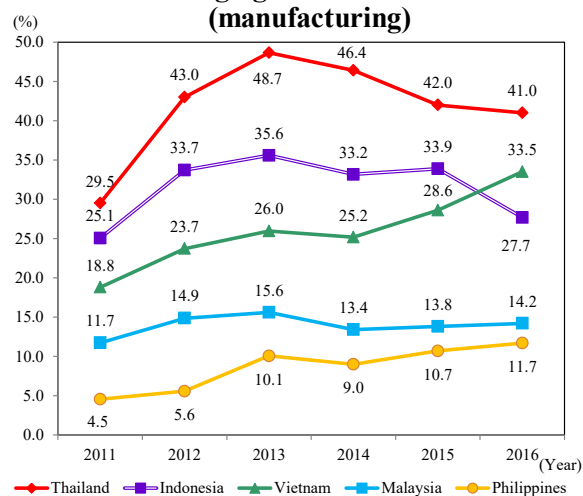
Note: 1) The numbers in FY2011 and FY2012 indicate the number of firms answering that they “intend to begin and expand overseas operations” after excluding the number of firms which gave no answer on functions planned to be expanded. The numbers in FY2013 and thereafter indicate the number of firms “intending to expand overseas operations” after excluding the number of firms which gave no answer on functions planned to be expanded. 2) ASEAN 6 refers to the total for the six countries of Singapore, Thailand, Malaysia, Indonesia, the Philippines and Vietnam (excluding duplication). 3) “Total” indicates the number of firms intending to expand one or more functions in each country and region. If a firm is intending to expand several functions to one country or region, it is counted as one firm only.

# Overseas expansion by country and region (time-series comparison)

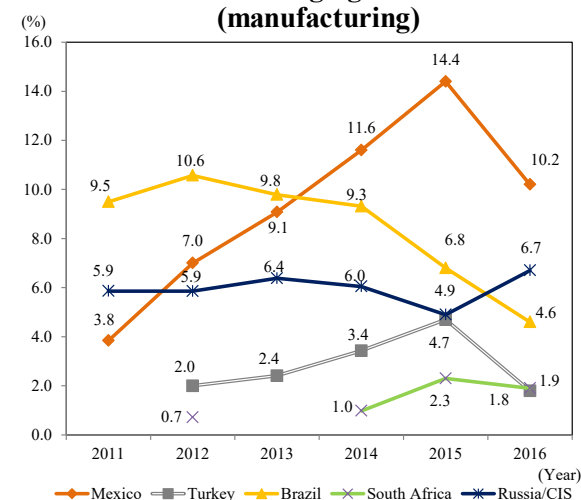
**Major countries/regions  
(manufacturing)**



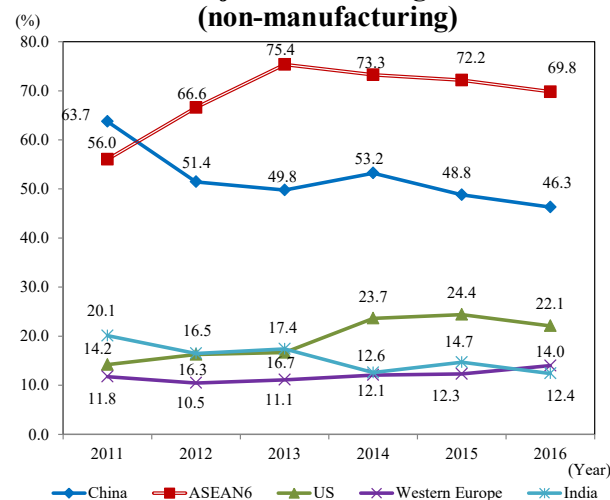
**Emerging markets in Asia  
(manufacturing)**



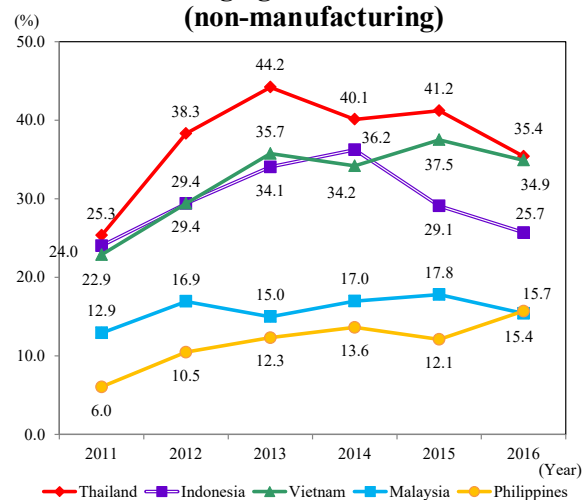
**Other emerging markets  
(manufacturing)**



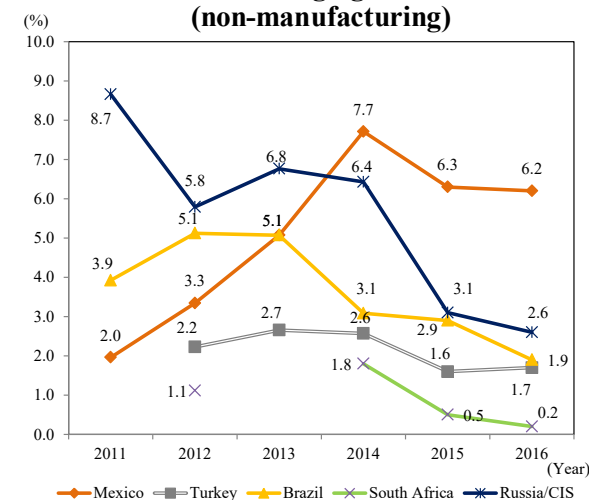
**Major countries/regions  
(non-manufacturing)**



**Emerging markets in Asia  
(non-manufacturing)**



**Other emerging markets  
(non-manufacturing)**



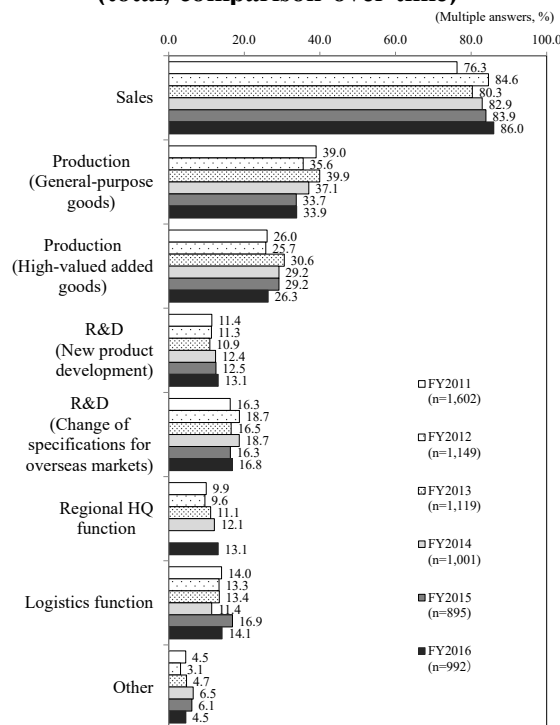
Note: 1) The numbers in FY2011 and FY2012 indicate the number of firms answering that they “intend to begin and expand overseas operations” after excluding the number of firms which gave no answer on functions planned to be expanded. The numbers in FY2013 and thereafter indicate the number of firms “intending to expand overseas operations” after excluding the number of firms which gave no answer on functions planned to be expanded. 2) ASEAN 6 refers to the total for the six countries of Singapore, Thailand, Malaysia, Indonesia, the Philippines, and Vietnam (excluding duplication).

# Functions to be expanded overseas

## ■ Trend toward strengthening base functions for sales and production in Vietnam

Looking at functions to be expanded overseas, the percentage of respondent firms with a policy of strengthening sales was 86.0%, remaining high as before. In Vietnam, the percentage of firms strengthening sales increased from 22.2% in the previous year to 25.1%, rising from 5th place in the previous year to 4th place after China, Thailand and the US. Vietnam's rank also rose in terms of production of high value-added goods (4th place to 3rd place), R&D (change of specifications for overseas markets) (6th place to 4th place) and logistics (4th place to 3rd place).

### Functions to be expanded overseas (total, comparison over time)



### Functions to be expanded overseas (by function, by country/region)

Sales			Production						R&D						Regional HQ function			Logistics		
			General-purpose goods			High-valued added goods			New product development			Change of specifications for overseas markets								
Rank	Country/region	%	Rank	Country/region	%	Rank	Country/region	%	Rank	Country/region	%	Rank	Country/region	%	Rank	Country/region	%	Rank	Country/region	%
1	China	44.1	1	China	14.7	1	China	10.6	1	China	4.8	1	China	7.8	1	Singapore	3.9	1	China	5.2
2	Thailand	29.1	2	Thailand	10.0	2	Thailand	6.6	2	US	3.9	2	Thailand	4.5	2	China	3.8	2	Thailand	3.5
3	US	28.5	3	Vietnam	9.8	3	Vietnam	5.0	3	Western Europe	2.6	3	US	4.2	3	Thailand	3.5	3	Vietnam	3.4
4	Vietnam	25.1	4	Indonesia	5.2	3	US	5.0	4	Thailand	2.4	4	Vietnam	3.2	4	US	3.0	3	US	3.4
5	Indonesia	22.4	5	Indonesia	4.6	5	Indonesia	3.8	5	Vietnam	1.9	5	Western Europe	2.8	5	Western Europe	2.6	5	Western Europe	2.5
6	Taiwan	17.3	6	US	4.0	6	Taiwan	3.0	6	Taiwan	1.7	6	India	2.7	6	Hong Kong	1.0	6	Singapore	2.2
7	Western Europe	16.2	7	Myanmar	2.6	6	India	3.0	7	Indonesia	1.5	7	Taiwan	2.2	7	Vietnam	0.9	7	Hong Kong	2.0
8	Indonesia	15.0	8	Malaysia	2.5	8	Western Europe	2.6	8	India	1.2	8	Singapore	1.9	8	Malaysia	0.7	8	Taiwan	1.7
9	Singapore	13.9	9	Taiwan	2.1	9	Korea	2.0	9	Singapore	1.1	8	Indonesia	1.9	9	Indonesia	0.5	8	India	1.7
10	Korea	12.9	9	Philippines	2.1	10	Malaysia	1.9	10	Korea	0.9	10	Malaysia	1.4	9	Philippines	0.5	10	Indonesia	1.5
11	Hong Kong	12.6	11	Mexico	1.9	11	Philippines	1.7	10	Malaysia	0.9	11	Hong Kong	0.8	11	Taiwan	0.4	11	Philippines	1.4
12	Malaysia	11.8	12	Korea	1.6	12	Mexico	1.6	12	Philippines	0.5	11	Philippines	0.8	11	Korea	0.4	12	Myanmar	1.2
13	Philippines	10.8	12	Cambodia	1.6	12	Central-Eastern Europe	1.6	12	Canada	0.5	13	Korea	0.7	11	Myanmar	0.4	13	Malaysia	1.1
14	Myanmar	9.2	12	Western Europe	1.6	14	Myanmar	1.4	14	Hong Kong	0.4	14	Mexico	0.6	14	Australia	0.3	14	Korea	0.9
15	Mexico	6.5	15	Central-Eastern Europe	1.3	15	Singapore	1.2	14	Cambodia	0.4	15	Myanmar	0.5	14	Central-Eastern Europe	0.3	15	Mexico	0.8
16	Russia/CIS	4.6	16	Bangladesh	1.2	16	Hong Kong	0.9	14	Myanmar	0.4	15	Central-Eastern Europe	0.5	16	Canada	0.2	16	Cambodia	0.7
17	Central-Eastern Europe	4.3	17	Singapore	1.1	17	Australia	0.6	14	Central-Eastern Europe	0.4	17	Canada	0.4	16	India	0.2	17	Central-Eastern Europe	0.6
18	Australia	3.9	18	Hong Kong	0.7	18	Bangladesh	0.5	18	Bangladesh	0.3	18	Cambodia	0.3	16	Sri Lanka	0.2	18	Australia	0.5
19	Canada	3.0	19	Australia	0.5				18	Australia	0.3	18	Bangladesh	0.3	16	Mexico	0.2	19	Laos	0.4
20	Brazil	2.7	19	Brazil	0.5				18	Mexico	0.3	18	Australia	0.3	16	Brazil	0.2	20	Bangladesh, Brazil, Russia/CIS	0.3
	ASEAN 6	56.1		ASEAN 6	19.1		ASEAN 6	13.3		ASEAN 6	5.7		ASEAN 6	8.0		ASEAN 6	8.6		ASEAN 6	7.9
	Developed countries	52.6		Developed countries	8.3		Developed countries	10.5		Developed countries	7.1		Developed countries	7.9		Developed countries	7.7		Developed countries	7.3
	Emerging countries	74.6		Emerging countries	29.5		Emerging countries	21.2		Emerging countries	9.0		Emerging countries	13.0		Emerging countries	7.5		Emerging countries	10.6
	Sales (total)	86.0		General-purpose goods (total)	33.9		High-valued added goods (total)	26.3		New product development (total)	13.1		Change specifications for local market (total)	16.8		Regional HQ function (total)	13.1		Logistics (total)	14.1

Note: 1) Percentages of firms intending to expand particular functions over the next three years or so to the total (1,061 firms), excluding those with no answer about functions to be expanded (992 firms).

2) No country break down for Western Europe, Russia/CIS, and Central and Eastern Europe.

3) ASEAN 6 refers to the total for the following six countries: Singapore, Thailand, Malaysia, Indonesia, the Philippines, and Vietnam (excluding duplication). 4) Highlighted cells indicate items chosen by 10% or more of the respondents.

Notes: 1) The parameters are the same as the figures on the previous page. 2) The choices did not include "regional HQ functions" in FY2015.

# Restructuring of domestic and overseas bases

## ■ Largest number of cases involved transferring bases and functions from China

Regarding restructuring overseas and domestic bases and functions, the ratio of cases of restructuring out of China accounted for 36.0% of 458 transfer cases, surpassing cases of transferring from Japan (30.8%). Although the percentage declined, ASEAN continues to be the most highly cited destination for transfers at 36.9% as it was in the FY2014 survey. Japan was cited as the destination in 14.6% of cases, exceeding China (13.8%). Among combinations of transfer sources and destinations, “transferring from China to ASEAN” was most common (15.3%), exceeding “transferring from Japan to ASEAN” (12.9%). Of the 70 cases of transfer from China to ASEAN, “transferring from China to Vietnam” was the most common (38 cases), followed by transfer to Thailand and Myanmar (nine cases each). In addition, “transferring from China to Japan” accounted for 8.5%.

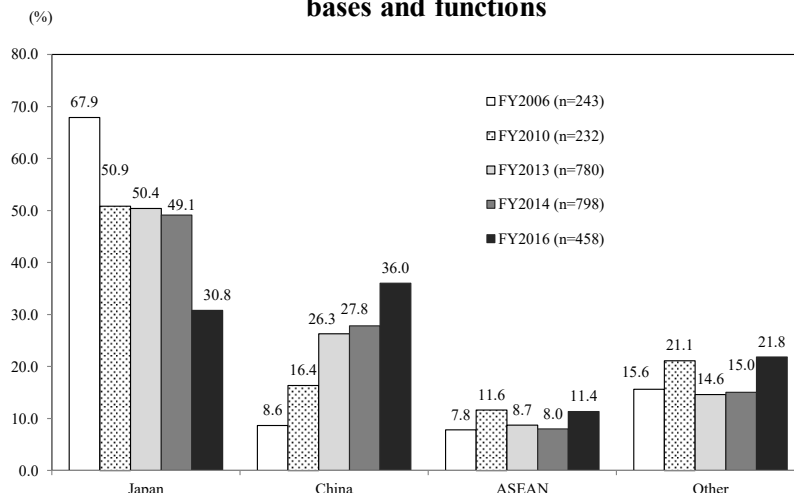
## Restructuring of domestic and overseas bases and functions

(Multiple answers, %)

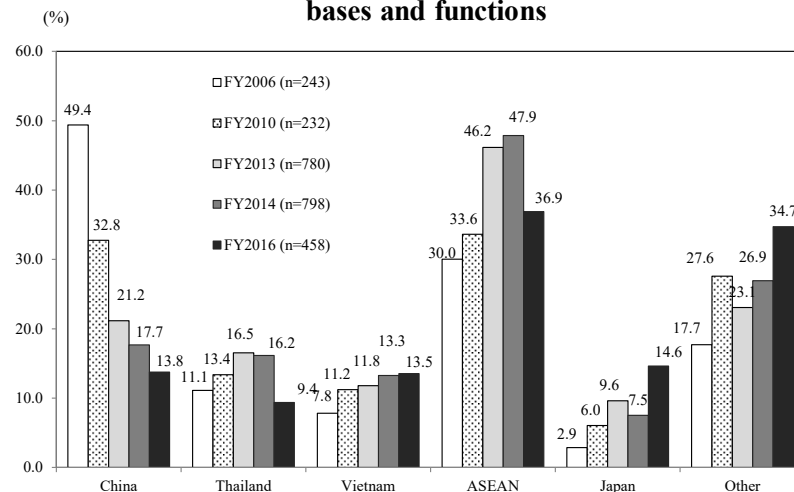
		Shift to				
		China (n=63)	ASEAN (n=169)	Japan (n=67)	Other (n=159)	Total (n=458)
Shift from	China (n=165)	5.2	15.3	8.5	7.0	36.0
	ASEAN (n=52)	0.4	7.0	2.6	1.3	11.4
	Japan (n=141)	6.8	12.9	0.0	11.1	30.8
	Other (n=100)	1.3	1.7	3.5	15.3	21.8
	Total (n=458)	13.8	36.9	14.6	34.7	100.0

Note: 1) Percentages are ratios to the total. 2) Because of rounding, percentages may not add up to 100%. 3) The figures above include cases of reported restructuring of bases conducted in the past two to three years or planned for in the coming two to three years.

## Sources of relocation of domestic and overseas bases and functions



## Destinations of relocation of domestic and overseas bases and functions



Note: 1) “Other” under sources and destinations of relocation includes responses that indicated no country name.  
2) The surveys in FY2006 and FY2010 were of JETRO members only.

# Restructuring of domestic and overseas bases

## Main transfer patterns

(Multiple answers, cases, %)

	Shift from	Shift to	No. of cases	Ratio to total
	Total		458	100.0
1	China	Japan	39	8.5
2	China	Vietnam	38	8.3
3	Japan	China	31	6.8
4	China	China	24	5.2
5	Japan	Thailand	20	4.4
6	Japan	Vietnam	15	3.3
7	Japan	Singapore	12	2.6
8	Japan	US	9	2.0
8	China	Thailand	9	2.0
8	China	Myanmar	9	2.0
11	Japan	Indonesia	6	1.3
11	Japan	India	6	1.3
11	US	US	6	1.3
14	China	Hong Kong	5	1.1
14	Japan	Western Europe (EU except UK)	5	1.1
14	China	Indonesia	5	1.1
14	China	Philippines	5	1.1
14	China	Bangladesh	5	1.1
14	Western Europe (EU, excluding UK)	Western Europe (EU, excluding UK)	5	1.1

Note: 1) Excluding cases in which the source or target country of a transfer are unknown and limited to 5 or more cases.

2) No choices were available in terms of a breakdown of "Western Europe (EU, excluding UK)."

Reference: Transfers made from UK

UK	Western Europe (EU excluding UK)	3	0.7
UK	Japan	1	0.2
Shift from UK		4	0.9

## Transfer patterns between Japan, China and ASEAN (comparison over time)

(Multiple answers, %)

	FY2006	FY2010	FY2013	FY2014	FY2016
From Japan to China	37.4	22.0	15.3	12.0	6.8
From Japan to ASEAN	19.8	19.0	24.2	22.7	12.9
From China to ASEAN	4.5	8.2	13.7	16.2	15.3
From China to Japan	0.4	1.3	4.7	4.6	8.5
From China to China	1.6	3.4	4.2	3.5	5.2
From ASEAN to Japan	0.8	0.4	1.8	1.1	2.6
From ASEAN to China	2.5	3.4	0.3	0.4	0.4
From ASEAN to ASEAN	4.1	3.4	6.2	5.8	7.0

## Transfer patterns between Japan, China and ASEAN (in detail)

(Multiple answers, %)

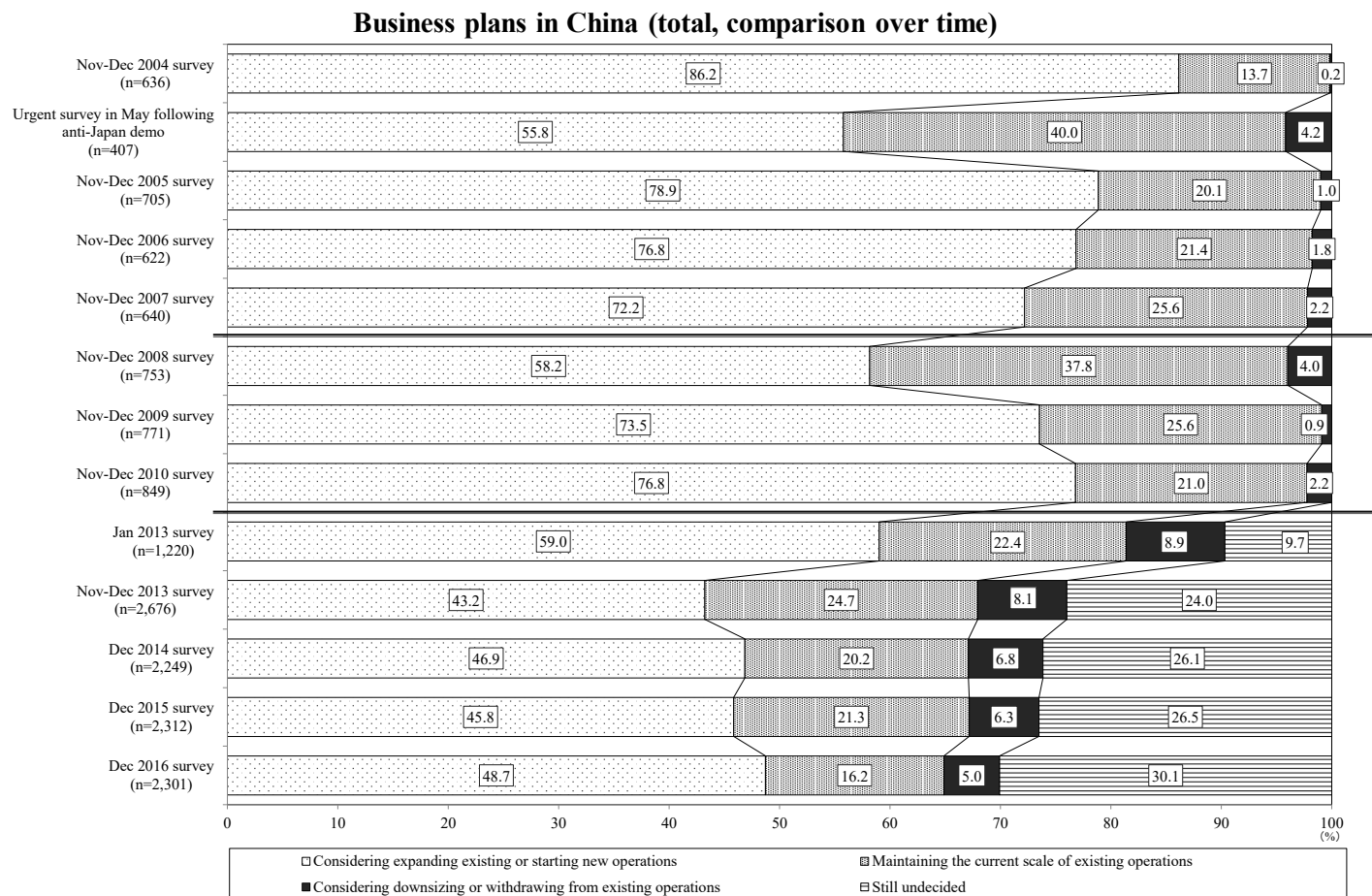
Shift from	Shift to	Ratio to total	Main industries
Japan	ASEAN (n=59)	12.9	Other manufacturing (15.3%) Trade and wholesale (13.6%) Construction (10.2%)
	Thailand (n=20)	4.4	Other manufacturing (15.0%) Trade and wholesale (15.0%)
	Vietnam (n=15)	3.3	Ceramics/earth & stone (26.7%) Iron & steel/non-ferrous metal/metal products (20.0%) Other manufacturing (20.0%)
Japan	Singapore (n=12)	2.6	Other manufacturing (16.7%) Trade and wholesale (16.7%) Construction (16.7%)
	China (n=31)	6.8	Electrical equipment (19.4%) Trade and wholesale (19.4%) Other manufacturing (16.1%)
China	ASEAN (n=70)	15.3	Trade and wholesale (30.0%) Textile/clothing (12.9%) Electrical equipment (11.4%)
	Vietnam (n=38)	8.3	Trade and wholesale (34.2%)
	Thailand (n=9)	2.0	Trade and wholesale (44.4%) Electrical equipment (22.2%)
China	Myanmar (n=9)	2.0	Textile/clothing (55.6%) Trade and wholesale (22.2%)
	Japan (n=39)	8.5	Coal & petroleum products/plastics/rubber products (12.8%)
China	China (n=24)	5.2	Chemicals (20.8%) Iron & steel/non-ferrous metal/metal products (12.5%) Trade and wholesale (12.5%)
Total (n=458)		100.0	Trade and wholesale (20.1%) Other manufacturing (9.4%)

Note: The percentage following each industry represents its ratio within each particular transfer pattern.

# Business plans in China

## ■ Firms continue to assume wait-and-see attitude toward future business in China

The percentage of firms answering that they will “consider expanding existing or starting new operations” slightly increased to 48.7% from 45.8% in the previous year. The percentages of firms answering that they will “maintain the current scale of existing operations” and “consider downsizing or withdrawing from existing operations” decreased to 16.2% and 5.0%, respectively. On the other hand, the percentage of firms answering that they are “still undecided” increased from 26.5% in the previous year to 30.1%. Japanese firms have continued to assume a wait-and-see attitude.



Notes: 1) Each total numbers does not include the number of firms answering “no business plan in China” or giving “no answer”; limited to answers from JETRO members only in and before 2010 2) Limited to manufacturing, trade, wholesale and retail firms in and before 2007; 3) Partially adjusting question items that differ among years; 4) There was no question about business plans in FY2011.

# Business plans in China

## Firms considering expanding existing operations or starting new operations in China (total, by industry)

(Multiple answers, %)

	No. of firms	Considering expanding existing or starting new operations	Considering expanding existing or starting new operations	Considering expanding existing or starting new operations while reducing scale and pace	Maintaining the current scale of existing operations	Considering downsizing or withdrawing from existing operations	Reducing business in China and considering transfer to another country	Withdrawing from business in China and considering business plans in another country	Still undecided
All respondent firms	2,301	48.7	41.5	7.2	16.2	5.0	4.0	1.1	30.1
Manufacturing	1,366	50.8	42.9	7.9	17.2	4.7	3.9	0.8	27.3
Food & beverages	304	42.1	37.8	4.3	8.2	2.3	1.6	0.7	47.4
Textiles, clothing	88	46.6	37.5	9.1	17.0	12.5	12.5	0.0	23.9
Wood & wood products, furniture & building materials, paper & pulp	48	45.8	43.8	2.1	20.8	4.2	4.2	0.0	29.2
Chemicals	83	56.6	51.8	4.8	24.1	1.2	1.2	0.0	18.1
Medical products & cosmetics	51	68.6	54.9	13.7	7.8	2.0	2.0	0.0	21.6
Coal & petroleum products, plastics, rubber products	76	52.6	43.4	9.2	22.4	3.9	3.9	0.0	21.1
Ceramics, earth & stone	22	45.5	40.9	4.5	18.2	9.1	9.1	0.0	27.3
Iron & steel, non-ferrous metals, metal products	132	46.2	37.1	9.1	18.9	9.1	5.3	3.8	25.8
General machinery	121	51.2	40.5	10.7	26.4	5.0	2.5	2.5	17.4
Electrical equipment	79	54.4	44.3	10.1	21.5	6.3	6.3	0.0	17.7
IT equipment, electronic parts & devices	43	60.5	44.2	16.3	18.6	4.7	4.7	0.0	16.3
Cars, car parts, other transportation machinery	93	54.8	45.2	9.7	20.4	5.4	5.4	0.0	19.4
Precision equipment	62	58.1	45.2	12.9	25.8	3.2	3.2	0.0	12.9
Other manufacturing	164	56.1	50.0	6.1	14.0	3.0	2.4	0.6	26.8
Non-manufacturing	935	45.7	39.5	6.2	14.7	5.6	4.1	1.5	34.1
Trade and wholesale	511	53.0	45.4	7.6	14.3	6.7	5.3	1.4	26.0
Retail	58	44.8	36.2	8.6	13.8	0.0	0.0	0.0	41.4
Construction	47	27.7	25.5	2.1	21.3	12.8	8.5	4.3	38.3
Transport	46	52.2	45.7	6.5	15.2	4.3	2.2	2.2	28.3
Finance & insurance	43	18.6	14.0	4.7	37.2	0.0	0.0	0.0	44.2
Communication, information & software	55	34.5	30.9	3.6	7.3	3.6	3.6	0.0	54.5
Professional services	39	38.5	38.5	0.0	5.1	5.1	2.6	2.6	51.3
Other non-manufacturing	136	37.5	33.1	4.4	12.5	4.4	2.2	2.2	45.6

Note: Highlighted cells indicate the item gaining the largest percentage in each industry.

## **4. Utilization of foreign personnel**

Securing human resources to lead overseas business is largest issue,  
about half of firms employ foreign employees

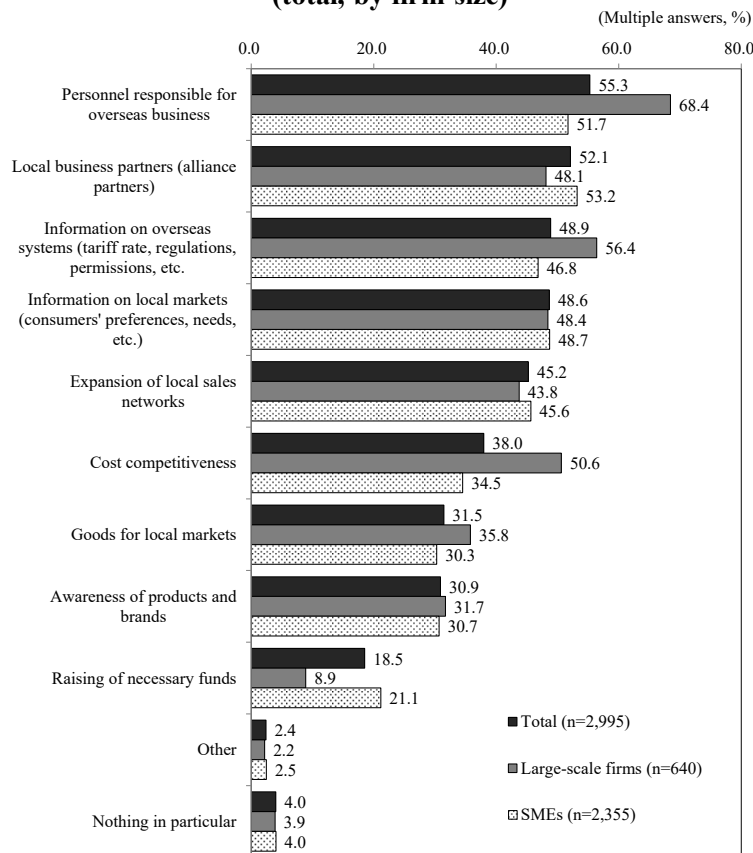
# Issues regarding overseas business

## ■ Greatest issue is securing personnel responsible for overseas business

For issues regarding overseas business, the percentage of firms answering with “personnel responsible for overseas business” is the largest (55.3%), followed by “local business partners” (52.1%) and “information on overseas systems” (48.9%). Compared with the results of past surveys, the percentage of firms identifying issues in terms of human resources and local business partners increased. In the case of SMEs, the percentage of firms answering with “local business partners” is the largest at 53.2%.

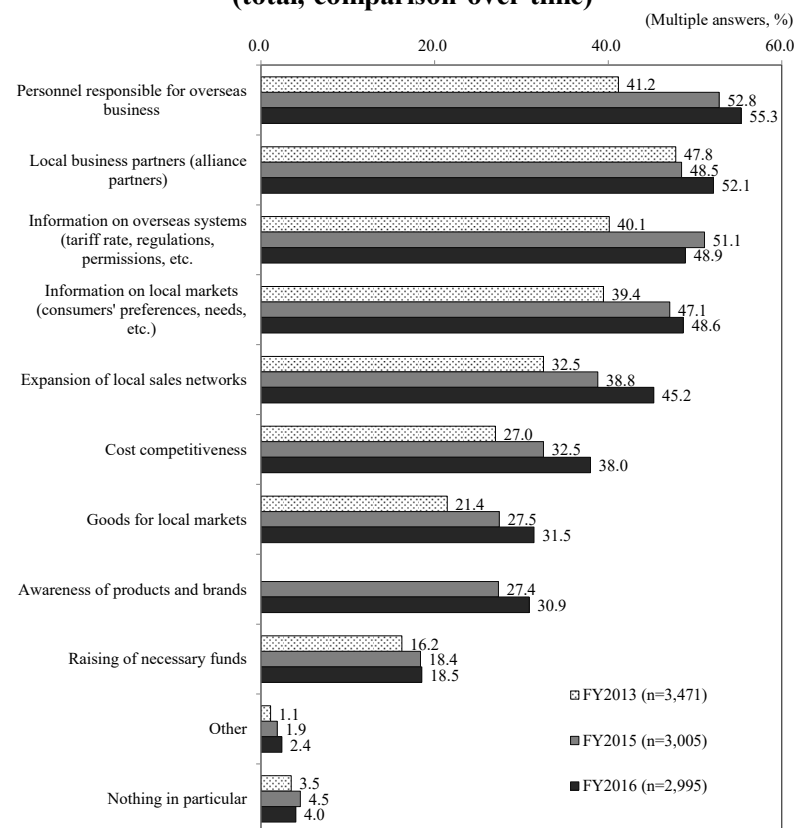
In the cars, car parts and other transportation machinery industry, the percentage of the firms that regarded “personnel responsible for overseas business” as an issue was 72.9%, remarkably higher than the other industries.

**Issues regarding overseas business  
(total, by firm size)**



Note: Percentage to the total number of respondent firms

**Issues regarding overseas business  
(total, comparison over time)**



Note: 1) Percentage to the total number of respondent firms. 2) The FY2013 survey did not have the choice of "awareness of products and brands."

# Human resources for expansion of overseas business, hiring of foreign employees

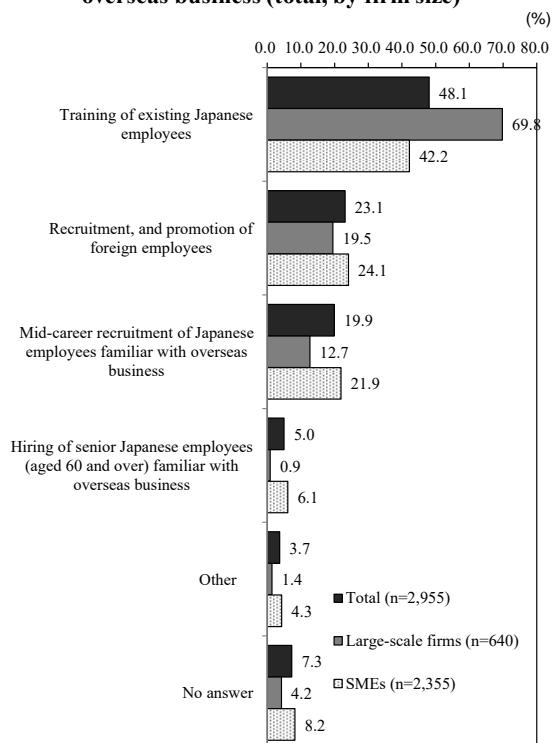
## Importance placed not only on training of Japanese employees but also on hiring of foreign employees

Regarding human resource strategies for expansion of overseas business, the percentage of firms answering with “training of existing Japanese employees” was the largest at 48.1%, followed by “recruitment and promotion of foreign employees” (23.1%). By firm size, SMEs exceeded large-scale companies in terms of the percentage of firms choosing each of the answers except “training of existing Japanese employees,” which indicates that SMEs place more importance on industry-ready human resources.

## About half of firms hired foreign employees

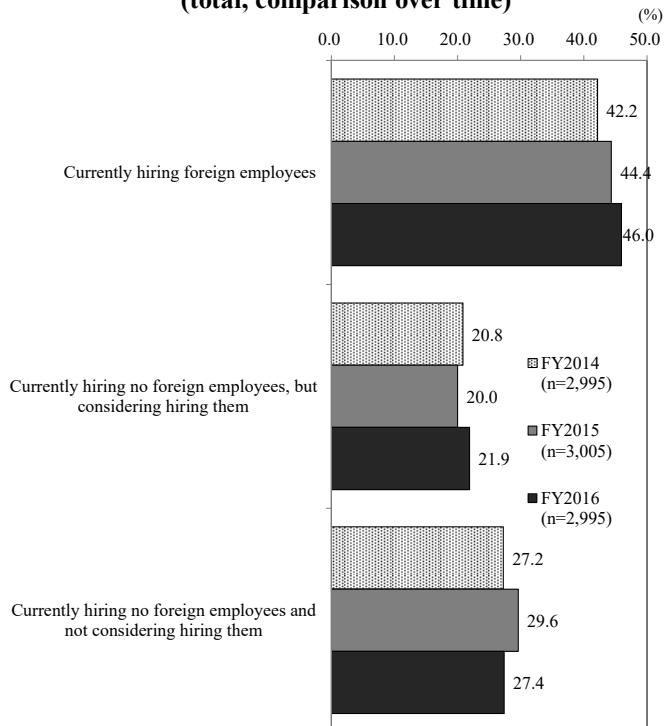
The percentage of firms “currently hiring foreign employees” increased for the second consecutive year to 46.0%, indicating a mildly upward trend. While the percentage of large-scale companies “currently hiring foreign employees” was 73.1%, such SMEs accounted for only 38.6%. However, the percentage of SMEs answering that they were “consider hiring foreign employees” was 24.7%, indicating that their interest in foreign human resources is high. By industry, the percentage of manufacturers “currently hiring foreign employees” was 48.3%, exceeding the percentage of such non-manufacturers (43.1%). This indicates manufacturers are actively utilizing foreign human resources.

Most important human resources for expansion of overseas business (total, by firm size)



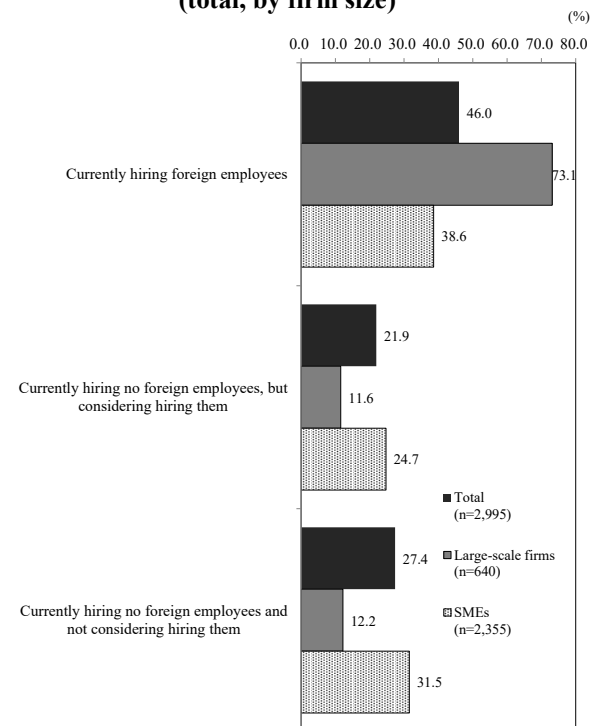
Note: 1) The parameter is the total number of respondent firms. 2) companies giving multiple answers are included in some cases.

Hiring of foreign employees (total, comparison over time)



Note: The parameter is the total number of respondent firms.

Hiring of foreign employees (total, by firm size)



Note: The parameter is the total number of respondent firms.

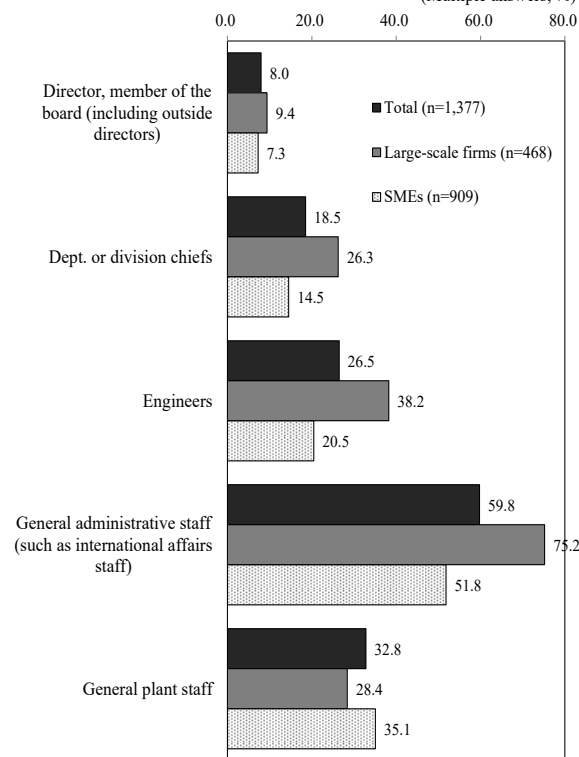
# Positions of foreign employees

## ■ Largest number of foreign employees work as general administrative staff

Of firms with foreign employees, 59.8% answered that they employ them as general administrative staff (such as for international affairs) followed by general plant staff (32.8%) and engineers (26.5%). Meanwhile, 8.0% of the firms have foreigners as directors and members of the board. This percentage is high in electrical equipment (18.2%), precision equipment (13.5%) and IT equipment and electronic parts and devices (13.3%).

Positions of foreign employees  
(total, by firm size)

(Multiple answers, %)



Note: The parameter is the number of firms answering “currently hiring foreign employees.”

Positions of foreign employees (by industry)

(Multiple answers, %)

	No. of firms	Having foreigners as director, member of the board (including outside directors)	Having foreign employees as dept. or division chiefs	Having foreign employees as engineers	Having foreign employees in general administrative staff (such as the international affairs staff)	Having foreign employees in general plant staff
Total	1,377	8.0	18.5	26.5	59.8	32.8
Manufacturing	802	7.4	18.0	30.8	57.0	43.4
Food & beverages	125	4.8	8.8	3.2	42.4	63.2
Textiles, clothing	44	11.4	15.9	11.4	59.1	38.6
Wood & wood products, furniture & building materials, paper	28	3.6	21.4	17.9	50.0	42.9
Chemicals	48	6.3	27.1	27.1	58.3	27.1
Medical products & cosmetics	33	6.1	24.2	6.1	78.8	21.2
Coal & petroleum products, plastics, rubber products	42	11.9	21.4	19.0	50.0	52.4
Ceramics, earth & stone	13	7.7	15.4	30.8	61.5	23.1
Iron & steel, non-ferrous metals, metal products	98	6.1	14.3	30.6	50.0	44.9
General machinery	78	1.3	17.9	53.8	56.4	41.0
Electrical equipment	55	18.2	25.5	60.0	69.1	30.9
IT equipment, electronic parts & devices	30	13.3	23.3	60.0	70.0	30.0
Cars, car parts, other transportation machinery	84	8.3	19.0	48.8	59.5	58.3
Precision equipment	37	13.5	29.7	40.5	73.0	27.0
Other manufacturing	87	3.4	13.8	31.0	59.8	39.1
Non-manufacturing	575	8.9	19.3	20.5	63.7	18.1
Trade and wholesale	256	11.7	19.5	8.6	71.5	14.5
Retail	33	6.1	9.1	6.1	69.7	33.3
Construction	48	4.2	12.5	58.3	33.3	25.0
Transport	38	7.9	21.1	5.3	76.3	18.4
Finance & insurance	32	6.3	15.6	3.1	93.8	3.1
Communication, information & software	45	8.9	22.2	73.3	35.6	2.2
Professional services	28	10.7	39.3	39.3	67.9	10.7
Other non-manufacturing	95	5.3	18.9	20.0	52.6	33.7

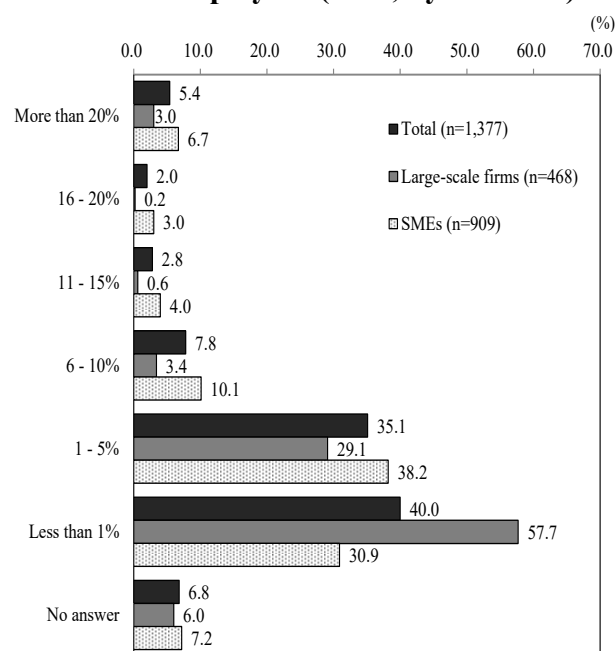
Note: 1) The parameter is the number of firms answering “currently hiring foreign employees.” 2) The shaded parts are industries with more than 10% of firms answering “having foreigners as director, member of the board”

# Ratio of foreign employees

## ■ SMEs have higher ratio of foreign employees

Regarding the ratio of foreign employees to the total number of full-time employees, the percentage of firms answering “less than 1%” and “1 to 5%” was 75.1% in total. The percentage of firms answering “more than 20%” was 5.4%. By firm size, SMEs have a higher ratio of foreign employees than large-scale companies.

Ratio of foreign employees to number of full-time employees (total, by firm size)



Note: The parameter is the number of firms answering “currently hiring foreign employees.”

Ratio of foreign employees to number of full-time employees (by industry)

	No. of firms	Less than 1%	1 - 5%	6 - 10%	11 - 15%	16 - 20%	More than 20%	No answer
Total	1,377	40.0	35.1	7.8	2.8	2.0	5.4	6.8
Manufacturing	802	41.5	34.9	8.1	2.6	2.2	3.6	7.0
Food & beverages	125	43.2	35.2	8.0	4.0	3.2	2.4	4.0
Textiles, apparel	44	38.6	18.2	20.5	4.5	6.8	-	11.4
Wood & wood products, furniture & building materials, paper & pulp	28	53.6	25.0	17.9	-	-	-	3.6
Chemicals	48	58.3	33.3	2.1	-	-	6.3	-
Medical products & cosmetics	33	33.3	45.5	9.1	-	-	9.1	3.0
Coal & petroleum products, plastics, rubber products	42	38.1	28.6	9.5	7.1	-	9.5	7.1
Ceramics, earth & stone	13	46.2	38.5	-	-	-	-	15.4
Iron & steel, non-ferrous metals, metal products	98	34.7	30.6	10.2	2.0	4.1	4.1	14.3
General machinery	78	35.9	43.6	6.4	5.1	2.6	1.3	5.1
Electrical equipment	55	38.2	43.6	5.5	1.8	-	1.8	9.1
IT equipment, electronic parts & devices	30	50.0	33.3	3.3	3.3	-	3.3	6.7
Cars, car parts, other transportation machinery	84	44.0	33.3	8.3	2.4	1.2	2.4	8.3
Precision equipment	37	43.2	35.1	5.4	-	-	10.8	5.4
Other manufacturing	87	40.2	39.1	5.7	1.1	4.6	3.4	5.7
Non-manufacturing	575	37.9	35.3	7.5	3.1	1.7	8.0	6.4
Trade and wholesale	256	31.3	39.1	7.8	4.7	2.3	8.6	6.3
Retail	33	24.2	54.5	6.1	-	-	6.1	9.1
Construction	48	56.3	27.1	4.2	-	2.1	6.3	4.2
Transport	38	57.9	34.2	2.6	-	-	-	5.3
Finance & insurance	32	87.5	6.3	-	-	-	-	6.3
Communication, information & software	45	15.6	44.4	22.2	4.4	2.2	6.7	4.4
Professional services	28	21.4	39.3	7.1	-	-	17.9	14.3
Other non-manufacturing	95	42.1	27.4	6.3	4.2	2.1	11.6	6.3

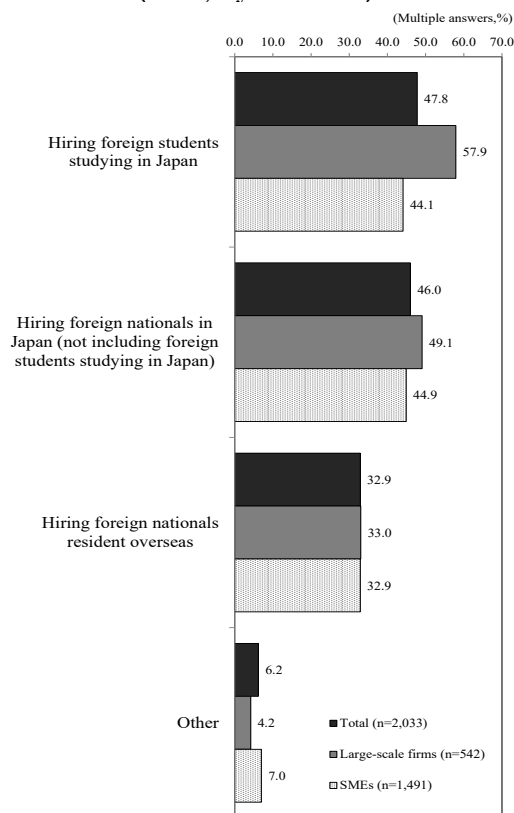
Note: 1) The parameter is the number of firms answering “currently hiring foreign employees.” 2) The shaded parts are items with an answer ratio of 40% or more.

# Methods and measures for hiring foreign employees, career development policy

## ■ Largest number of firms apply their career development policy for Japanese employees to foreigner employees

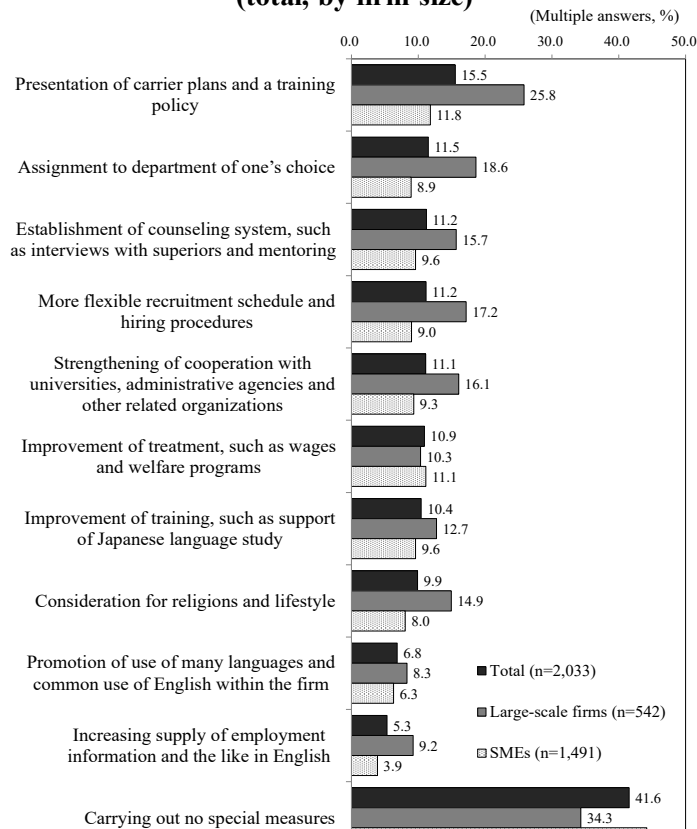
Regarding the methods for hiring foreign employees, 47.8% of the companies currently hiring foreign employees or expecting to consider their recruitment answered that they are “hiring foreign students studying in Japan.” The percentage increases to 57.9% if limited to large-scale companies. Regarding measures for hiring foreign employees, 41.6% of the respondent firms answered that they are “carrying out no special measures,” followed by “presentation of career plans or a training policy” (15.5%) and “assignment to the department of one’s choice” (11.5%). With all the items except “improvement of treatment, such as salary and welfare program,” large-scale companies chose these measures more than SMEs. Regarding the career development policy for foreign employees, many companies plan the “same job rotation as Japanese employees” (35.8%), followed by “specialization in overseas operations” (25.7%) and “promotion to senior management in local companies or offices in their home countries/regions” (17.7%).

**Methods of hiring foreign employees  
(total, by firm size)**



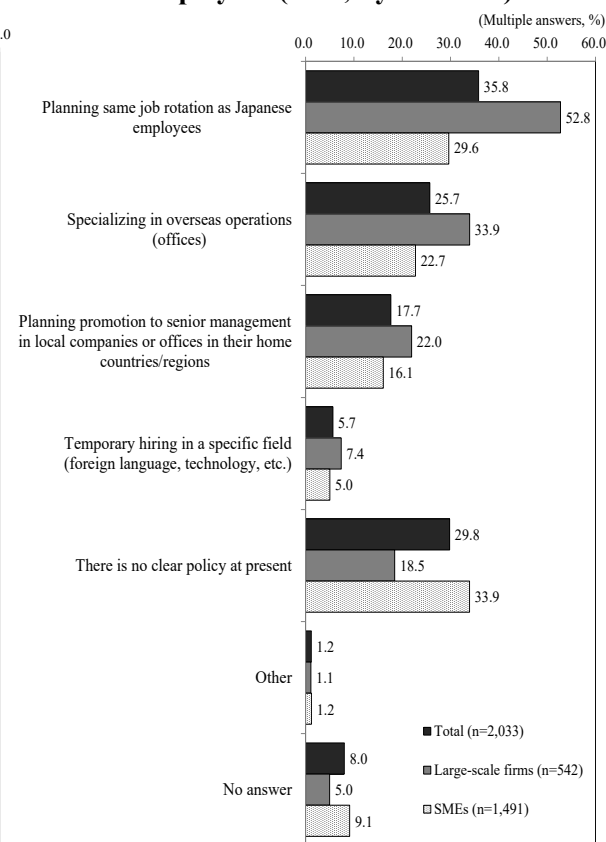
Note: The parameter is the number of firms answering “currently hiring foreign employees” and “considering hiring foreign employees” in this survey.

**Measures for hiring foreign employees  
(total, by firm size)**



Note: The parameter is the number of firms answering “currently hiring foreign employees” and “considering hiring foreign employees” in this survey.

**Career development policy for foreign employees (total, by firm size)**



Note: The parameter is the number of firms answering “currently hiring foreign employees” and “considering hiring foreign employees” in this survey.

## **5. Electronic Commerce (E-commerce)**

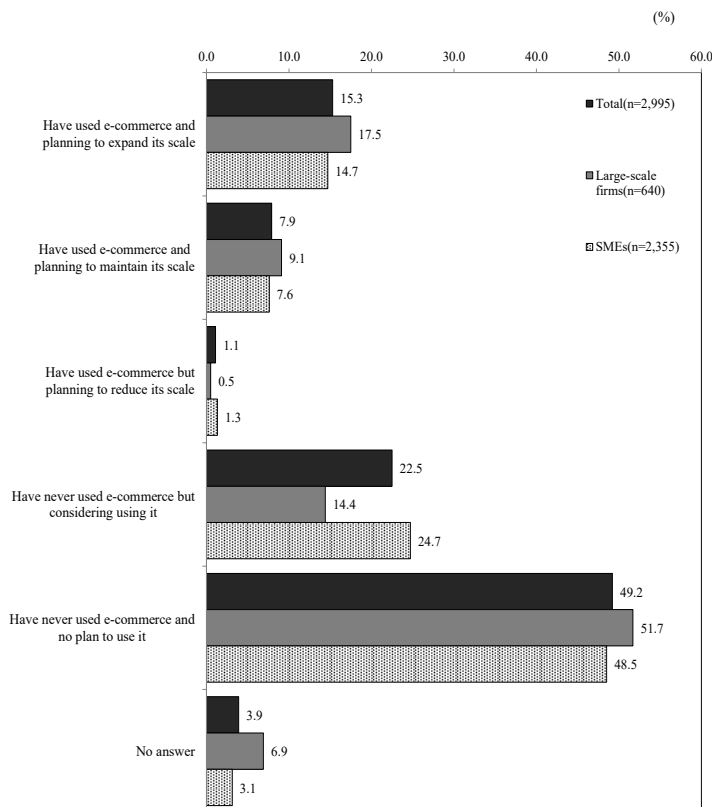
- E-commerce used by 24.4% of firms. Of companies using e-commerce, 47.2% use it for overseas sales-

# Use of e-commerce

## Percentage of firms using e-commerce is 24.4%; more than 20% of firms considering using e-commerce

Of all the respondent firms of this survey, 24.4% answered that they “have used e-commerce” for domestic or overseas sales (choosing “have used e-commerce and planning to expand its scale,” “have used e-commerce and planning to maintain its scale,” or “have used e-commerce but planning to reduce its scale”; excluding duplication). If the number of firms answering that they are “considering using e-commerce” (22.5%) is added, the percentage increases to 46.9%. By firm size, the percentage of large-scale companies answering that they “have used e-commerce” was 27.1%, larger than the percentage of such SMEs (23.6%).

Use of e-commerce (total, by firm size)



Note: Percentages to the total number of respondent firms in this survey

Use of e-commerce (by industry)

	No. of firms	Have used e-commerce	Have used e-commerce and planning to expand its scale	Have used e-commerce and planning to maintain its scale	Have used e-commerce but planning to reduce its scale	Have never used e-commerce but considering using it	Have never used e-commerce and no plan to use it	No answer
All respondent firms	2,995	24.4	15.3	7.9	1.1	22.5	49.2	3.9
<b>Manufacturing</b>	1,660	25.7	16.0	8.6	1.1	22.4	48.7	3.2
Food & beverages	394	29.3	21.1	6.9	1.3	29.7	37.8	3.3
Textiles/clothing	103	33.0	23.3	7.8	1.9	25.2	36.9	4.9
Wood & wood products/furniture & building materials/paper & pulp	62	48.3	29.0	17.7	1.6	29.0	22.6	-
Chemicals	92	17.4	7.6	8.7	1.1	20.7	59.8	2.2
Medical products & cosmetics	59	39.0	27.1	8.5	3.4	22.0	35.6	3.4
Coal & petroleum products/plastics/rubber products	94	26.6	14.9	10.6	1.1	26.6	44.7	2.1
Ceramics/earth & stone	28	14.3	14.3	-	-	14.3	67.9	3.6
Iron & steel/non-ferrous metals/metal products	168	19.7	13.1	6.0	0.6	25.6	52.4	2.4
General machinery	142	14.7	7.0	6.3	1.4	13.4	66.9	4.9
Electrical equipment	96	17.8	9.4	6.3	2.1	24.0	52.1	6.3
IT equipment/electronic parts & devices	53	45.3	15.1	28.3	1.9	15.1	39.6	-
Cars/car parts/other transportation machinery	107	14.9	8.4	6.5	-	7.5	74.8	2.8
Precision equipment	70	21.4	11.4	8.6	1.4	18.6	58.6	1.4
Other manufacturing	192	28.1	17.7	10.4	-	18.8	49.5	3.6
<b>Non-manufacturing</b>	1,335	22.8	14.5	7.2	1.1	22.5	49.9	4.8
Trade/Wholesale	641	27.4	16.7	9.0	1.7	24.0	45.7	2.8
Retail	80	50.1	37.5	11.3	1.3	30.0	17.5	2.5
Construction	90	7.8	1.1	6.7	-	25.6	64.4	2.2
Transport	75	6.7	4.0	2.7	-	18.7	64.0	10.7
Finance/insurance	77	5.2	5.2	-	-	2.6	70.1	22.1
Communication, information & software	83	25.3	19.3	6.0	-	30.1	41.0	3.6
Professional services	70	14.3	11.4	2.9	-	15.7	64.3	5.7
Other non-manufacturing	219	18.8	11.0	6.4	1.4	21.9	54.8	4.6

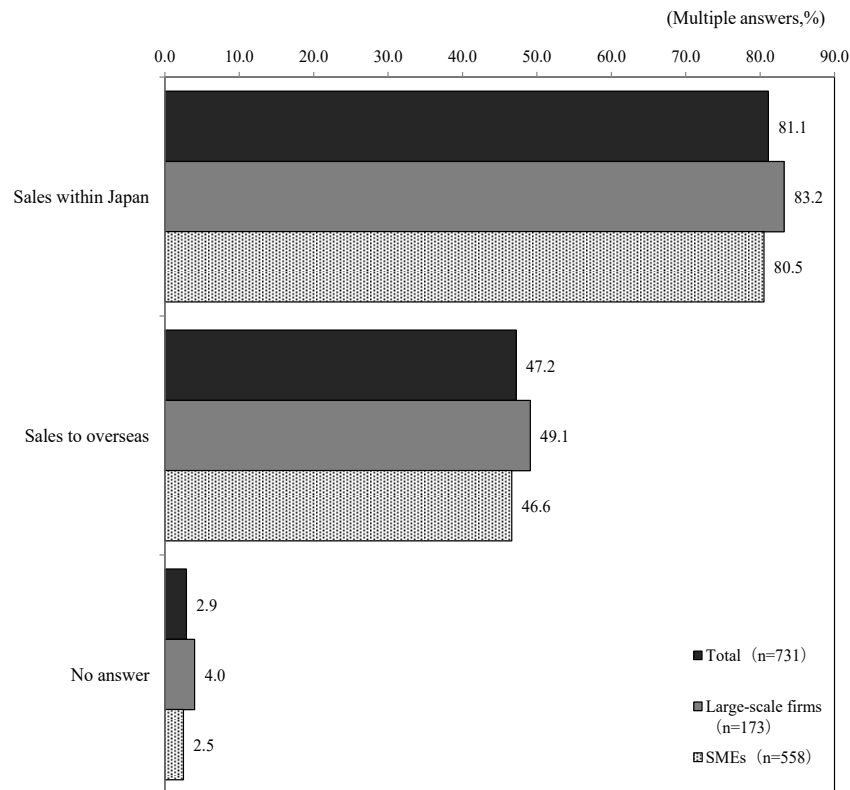
Notes: 1) Percentages to the total number of respondent firms in this survey; 2) Highlighted cells indicate that the percentage of firms answering “Have used e-commerce” is 30% or more.

# State of e-commerce use

## More than 30% of SMEs use e-commerce for sales from Japan to overseas

Of the 731 firms that have conducted e-commerce, 47.2% have used it for overseas sales. About half of the large-scale companies (49.1%) and SMEs (46.6%) use e-commerce for overseas sales. Of the firms with experience using e-commerce, 30.9% use e-commerce for sales from Japan to overseas (20.8% of large-scale companies; 34.1% of SMEs) and 22.8% use it for sales by overseas bases (local sales, sales to third countries) (37.6% of large-scale companies; 18.3% of SMEs).

State of e-commerce use (total, by firm size)



Note: Percentages to the total number of firms having used e-commerce.

State of e-commerce use (by industry)

(Multiple answers, %)						
	No. of firms	Sales within Japan	Sales to overseas	Sales from Japan to overseas	Sales from overseas bases	No answer
All respondent firms	731	81.1	47.2	30.9	22.8	2.9
Large-scale companies	173	83.2	49.1	20.8	37.6	4.0
SMEs	558	80.5	46.6	34.1	18.3	2.5
Manufacturing	427	82.9	49.4	30.7	25.5	2.3
Food & beverages	115	91.3	36.5	21.7	20.0	-
Textiles/clothing	34	76.5	61.8	44.1	23.5	-
Wood & wood products/furniture & building materials/paper & pulp	30	83.3	43.3	36.7	13.3	3.3
Chemicals	16	81.3	43.8	25.0	25.0	6.3
Medical products & cosmetics	23	82.6	82.6	34.8	56.5	-
Coal & petroleum products/plastics/rubber products	25	72.0	80.0	64.0	24.0	-
Iron & steel/non-ferrous metals/metal products	33	90.9	39.4	24.2	18.2	-
General machinery	21	66.7	52.4	33.3	28.6	4.8
Electrical equipment	17	82.4	41.2	17.6	35.3	11.8
IT equipment/electronic parts & devices	24	75.0	54.2	20.8	50.0	8.3
Cars/car parts/other transportation machinery	16	68.8	68.8	43.8	31.3	6.3
Precision equipment	15	86.7	46.7	26.7	26.7	-
Other manufacturing	54	83.3	44.4	29.6	20.4	3.7
Non-manufacturing	304	78.6	44.1	31.3	19.1	3.6
Trade/Wholesale	176	80.7	39.8	26.7	17.0	3.4
Retail	40	77.5	67.5	57.5	25.0	-
Communication, information & software	21	85.7	42.9	38.1	19.0	-
Professional services	10	50.0	50.0	40.0	20.0	10.0
Other non-manufacturing	41	75.6	46.3	29.3	22.0	4.9

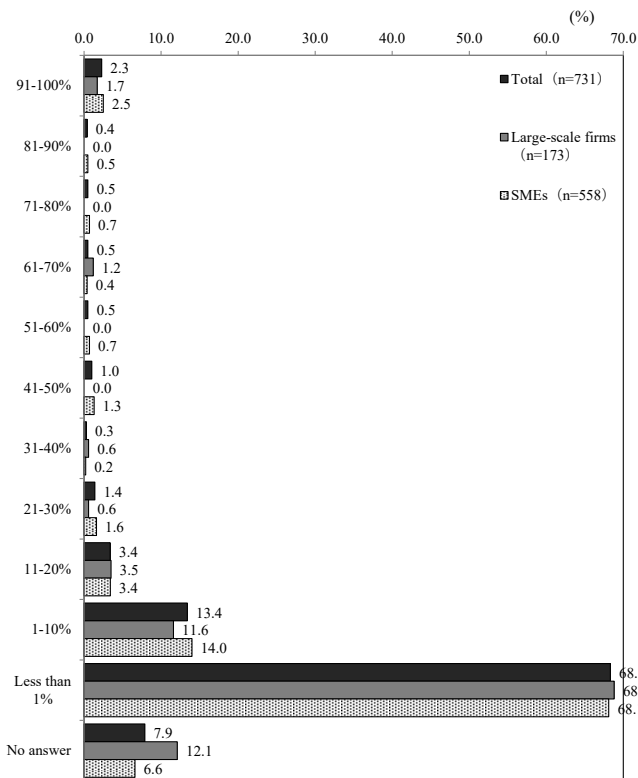
Notes: 1) Percentages to the total number of firms having used e-commerce; 2) Limited to industries with ten or more firms.

# Percentage of overseas e-commerce sales

## ■ For approximately 70% of firms, overseas e-commerce sales accounts for less than 1% of total sales by e-commerce

Regarding the percentage of overseas e-commerce sales (“overseas sales by e-commerce” as a ratio of “total sales by e-commerce”; on a non-consolidated basis), 68.3% of the firms with experience in using e-commerce answered that the percentage is less than 1%. By firm size, there is no great gap between large-scale companies and SMEs. By industry, 4.2% of the manufacturers answered that the percentage is more than 30%, while 7.6% of the non-manufacturing firms answered so. Many companies with the percentage over 30% were found in communication, information and software (19.0%); cars, car parts and other transportation machinery (18.8%); and IT equipment, electronic parts and devices (12.5%).

Percentage of overseas e-commerce sales  
(total by firm size)



Note: Percentages to the total number of firms having used e-commerce

Percentage of overseas e-commerce sales (by industry)

	No. of firms	Less than 1%	1-10%	11-20%	21-30%	More than 30%	No answer
All respondent firms	731	68.3	13.4	3.4	1.4	5.5	7.9
Manufacturing	427	71.7	12.6	3.0	1.6	4.2	6.8
Food & beverages	115	80.0	10.4	1.7	0.9	1.8	5.2
Textiles/clothing	34	79.4	11.8	-	-	2.9	5.9
Wood & wood products/furniture & building materials/paper & pulp	30	83.3	6.7	3.3	3.3	-	3.3
Chemicals	16	75.0	-	6.3	6.3	-	12.5
Medical products & cosmetics	23	43.5	30.4	8.7	4.3	8.6	4.3
Coal & petroleum products/plastics/rubber products	25	72.0	24.0	-	-	-	4.0
Iron & steel/non-ferrous metals/metal products	33	72.7	9.1	3.0	3.0	6.0	6.1
General machinery	21	76.2	4.8	9.5	4.8	-	4.8
Electrical equipment	17	76.5	-	5.9	-	5.9	11.8
IT equipment/electronic parts & devices	24	66.7	12.5	-	-	12.5	8.3
Cars/car parts/other transportation machinery	16	25.0	37.5	-	6.3	18.8	12.5
Precision equipment	15	66.7	13.3	-	-	6.7	13.3
Other manufacturing	54	66.7	13.0	5.6	-	5.6	9.3
Non-manufacturing	304	63.5	14.5	3.9	1.0	7.6	9.5
Trade/Wholesale	176	67.0	14.2	3.4	0.6	5.7	9.1
Retail	40	60.0	20.0	2.5	5.0	7.5	5.0
Communication, information & software	21	71.4	9.5	-	-	19.0	-
Professional services	10	40.0	10.0	20.0	-	10.0	20.0
Other non-manufacturing	41	58.5	9.8	4.9	-	12.1	14.6

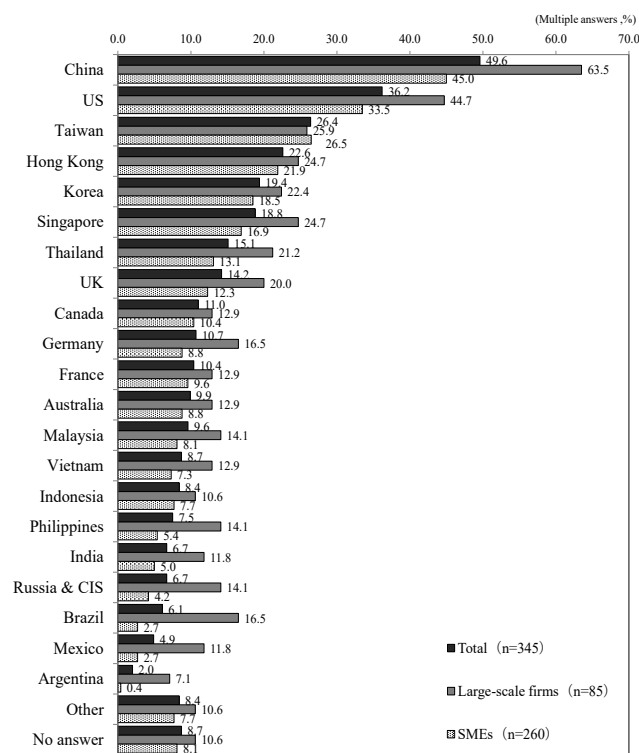
Notes: 1) Percentages to the total number of firms having used e-commerce; 2) Limited to industries with ten or more firms

# Current sales target countries and regions

## ■ China is top sales target country, followed by US

Current major sales target countries/regions (cross-border sales from Japan and sales from overseas bases) are China (49.6% of the firms using e-commerce for overseas sales), the US (36.2%), Taiwan (26.4%), Hong Kong (22.6%) and Korea (19.4%). In almost all industries, China is the most important sales target country. In the medical products and cosmetics industry, 89.5% of the respondent firms chose China as their customer.

Current sales target countries/regions



Notes: Percentages to the total number of firms using e-commerce for overseas sales.

Current sales target countries/regions (top ten, by industry)

(Multiple answers, %)

	No. of firms	China	US	Taiwan	Hong Kong	Korea	Singapore	Thailand	UK	Canada	Germany
All respondent firms	345	49.6	36.2	26.4	22.6	19.4	18.8	15.1	14.2	11.0	10.7
Manufacturing	211	51.7	40.8	27.0	22.3	20.4	18.0	13.7	15.6	10.9	12.8
Food & beverages	42	47.6	28.6	21.4	21.4	2.4	19.0	-	4.8	2.4	4.8
Textiles/clothing	21	47.6	42.9	33.3	33.3	23.8	28.6	9.5	19.0	14.3	14.3
Wood & wood products/furniture & building materials/paper & pulp	13	46.2	38.5	15.4	7.7	23.1	7.7	-	7.7	23.1	15.4
Medical products & cosmetics	19	89.5	10.5	47.4	31.6	26.3	21.1	15.8	5.3	-	5.3
Coal & petroleum products/plastics/rubber products	20	40.0	60.0	20.0	25.0	20.0	20.0	20.0	15.0	20.0	20.0
Iron & steel/non-ferrous metals/metal products	13	53.8	38.5	15.4	7.7	23.1	15.4	7.7	7.7	7.7	-
General machinery	11	54.5	45.5	36.4	18.2	27.3	9.1	27.3	18.2	18.2	9.1
IT equipment/electronic parts & devices	13	38.5	53.8	15.4	15.4	23.1	15.4	23.1	23.1	7.7	15.4
Cars/car parts/other transportation machinery	11	45.5	27.3	-	18.2	9.1	-	36.4	9.1	-	27.3
Other manufacturing	24	45.8	58.3	29.2	29.2	25.0	12.5	12.5	33.3	12.5	12.5
Non-manufacturing	134	46.3	29.1	25.4	23.1	17.9	20.1	17.2	11.9	11.2	7.5
Trade/Wholesale	70	48.6	21.4	18.6	20.0	11.4	15.7	15.7	4.3	4.3	5.7
Retail	27	44.4	40.7	37.0	29.6	33.3	22.2	18.5	25.9	18.5	11.1
Other non-manufacturing	19	52.6	26.3	31.6	36.8	31.6	31.6	21.1	26.3	15.8	10.5

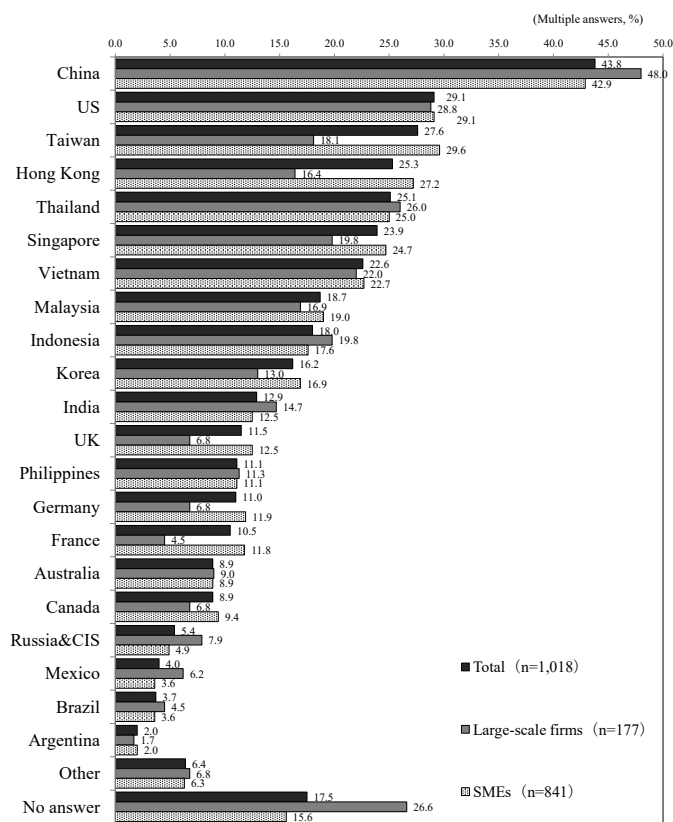
Notes: 1) Percentages to the total number of firms using e-commerce for overseas sales; (2) Highlighted cells indicate the item gaining the largest percentage in each industry; (3) Limited to industries with ten or more firms.

# Future sales target countries and regions

## China is also top future sales target country, again followed by US

Regarding countries and regions where firms are planning to expand or start use of e-commerce, the largest number of firms chose China (43.8% of the firms that use e-commerce for overseas sales or are considering using e-commerce), followed by the US (29.1%). All the top ten countries and regions are Asian countries and regions, except for the US. By firm size, many large-scale companies chose China, while the percentage of SMEs choosing Taiwan, Hong Kong, the UK, Germany and France was relatively larger than that of large-scale firms choosing the same.

Future sales target countries/regions  
(total, by firm size)



Note: Percentages of firms using or considering using e-commerce for overseas

Future sales target countries/regions (top ten, by industry)

	No. of firms	China	US	Taiwan	Hong Kong	Thailand	Singapore	Vietnam	Malaysia	Indonesia	Korea
(Multiple answers, %)											
All respondent firms	1,018	43.8	29.1	27.6	25.3	25.1	23.9	22.6	18.7	18.0	16.2
Manufacturing	583	42.4	30.7	25.7	21.8	22.3	23.0	19.0	16.5	15.4	15.6
Food & beverages	159	50.9	32.1	35.2	35.8	17.6	33.3	13.8	15.1	10.1	16.4
Textiles, clothing	47	44.7	27.7	21.3	17.0	21.3	19.1	8.5	12.8	14.9	17.0
Wood & wood products, furniture & building materials, paper & pulp	31	35.5	19.4	16.1	19.4	22.6	22.6	25.8	22.6	19.4	12.9
Chemicals	26	38.5	23.1	19.2	19.2	34.6	19.2	34.6	23.1	23.1	15.4
Medical products & cosmetics	32	50.0	9.4	21.9	21.9	18.8	21.9	28.1	25.0	18.8	9.4
Coal & petroleum products, plastics, rubber products	45	33.3	40.0	28.9	20.0	24.4	20.0	22.2	15.6	15.6	20.0
Iron & steel, non-ferrous metals, metal products	56	37.5	30.4	26.8	16.1	26.8	16.1	30.4	16.1	21.4	17.9
General machinery	30	23.3	13.3	16.7	10.0	30.0	13.3	23.3	10.0	20.0	13.3
Electrical equipment	30	33.3	36.7	13.3	10.0	40.0	26.7	23.3	26.7	23.3	13.3
IT equipment, electronic parts & devices	21	23.8	47.6	9.5	4.8	19.0	9.5	14.3	14.3	14.3	9.5
Cars, car parts, other transportation machinery	19	47.4	36.8	10.5	5.3	21.1	5.3	10.5	10.5	26.3	5.3
Precision equipment	20	65.0	40.0	35.0	20.0	35.0	25.0	20.0	25.0	20.0	30.0
Other manufacturing	60	40.0	35.0	23.3	21.7	11.7	21.7	13.3	11.7	6.7	13.3
Non-manufacturing	435	45.7	26.9	30.1	30.1	29.0	25.1	27.4	21.6	21.4	17.0
Trade, wholesale	224	50.4	28.1	29.5	33.9	29.0	23.2	26.8	21.9	20.5	19.2
Retail	51	41.2	27.5	25.5	29.4	23.5	19.6	23.5	23.5	17.6	15.7
Construction	26	30.8	19.2	30.8	15.4	19.2	30.8	34.6	19.2	26.9	11.5
Transport	14	57.1	35.7	28.6	28.6	50.0	35.7	42.9	14.3	21.4	14.3
Communication, information & software	34	35.3	32.4	35.3	23.5	41.2	29.4	29.4	23.5	26.5	20.6
Professional services	16	12.5	25.0	12.5	18.8	6.3	12.5	18.8	12.5	12.5	-
Other non-manufacturing	67	50.7	22.4	38.8	31.3	32.8	32.8	26.9	23.9	25.4	16.4

Note: (1) Percentages of firms using or considering using e-commerce for overseas sales. (2) Highlighted cells indicate the item with the largest percentage in each industry. (3) Limited to industries with ten or more firms.

# Issues regarding e-commerce for overseas sales

## ■ Regarding overseas sales, firms show strong anxiety about payment and logistics

Issues regarding e-commerce for overseas sales are “reliability of the payment systems (chosen by 25.2% of the total number of respondent firms), “risks in transportation of goods” (24.2%), “shortage of required personnel” (21.1%), “necessity of using foreign languages” (21.0%) and “lack of information on systems and regulations” (21.0%). By firm size, more than 20% of the SMEs answered “shortage of required personnel” (22.6%), “necessity of using foreign languages” (22.4%), “lack of information on systems and regulations” (21.8%) and “high delivery cost” (21.4%), while the percentage of the large-scale companies answering each of these was below 20%.

## Issues regarding e-commerce for overseas sales (total, by firm size, by industry)

	No. of firms	Risks in transportation of goods (damage, accuracy)	High delivery cost	Limited payment options	Reliability of the payment systems	Risks regarding information leakage	Complicated customs clearance	Unclear tariff payment standards	Insufficiency or uncertainty related laws/regulations	Lack of information on systems and regulations	Shortage of required personnel	Necessity of using foreign languages	Difficulties in increasing the firm's brand awareness	Other	Nothing in particular	Don't know	No answer
All respondent firms	2,995	24.2	19.5	9.7	25.2	12.0	18.2	13.8	11.9	21.0	21.1	21.0	15.1	4.6	10.5	17.8	13.3
Large-scale firms	640	21.4	12.5	9.1	22.0	14.4	13.6	10.5	15.6	17.8	15.5	15.9	14.4	6.7	13.8	16.6	15.0
SMEs	2,355	24.9	21.4	9.9	26.0	11.3	19.4	14.7	10.9	21.8	22.6	22.4	15.3	4.0	9.6	18.2	12.9
Manufacturing	1,660	26.3	21.0	9.6	26.3	11.9	19.2	14.3	11.8	22.9	23.1	23.4	16.9	4.7	8.9	18.1	12.2
Food & beverages	394	41.1	33.5	12.2	29.2	10.7	27.4	15.5	11.9	28.9	25.9	32.0	22.1	1.0	4.3	15.0	11.4
Textiles/clothing	103	27.2	29.1	7.8	26.2	5.8	13.6	13.6	8.7	20.4	30.1	20.4	25.2	6.8	8.7	10.7	18.4
Wood & wood products/furniture & building materials/paper & pulp	62	33.9	29.0	9.7	24.2	9.7	22.6	16.1	14.5	30.6	30.6	33.9	17.7	1.6	4.8	14.5	8.1
Chemicals	92	21.7	10.9	8.7	21.7	18.5	15.2	10.9	21.7	25.0	21.7	14.1	20.7	10.9	10.9	19.6	8.7
Medical products & cosmetics	59	25.4	25.4	6.8	27.1	10.2	18.6	13.6	20.3	23.7	22.0	25.4	20.3	6.8	5.1	20.3	11.9
Coal & petroleum products/plastics/rubber products	94	19.1	21.3	6.4	22.3	8.5	16.0	7.4	6.4	17.0	21.3	19.1	18.1	2.1	6.4	22.3	6.4
Ceramics/earth & stone	28	25.0	17.9	3.6	17.9	7.1	10.7	10.7	-	7.1	21.4	21.4	10.7	7.1	7.1	25.0	14.3
Iron & steel/non-ferrous metals/metal products	168	23.2	20.2	7.7	26.8	12.5	16.1	16.1	6.5	20.2	23.2	19.0	10.7	6.0	13.1	20.2	7.7
General machinery	142	16.9	12.0	9.9	27.5	14.1	15.5	12.7	11.3	23.2	18.3	22.5	12.7	9.9	9.9	18.3	12.7
Electrical equipment	96	24.0	13.5	7.3	28.1	13.5	15.6	16.7	9.4	20.8	21.9	21.9	13.5	5.2	9.4	9.4	24.0
IT equipment/electronic parts & devices	53	26.4	17.0	22.6	39.6	28.3	30.2	20.8	20.8	32.1	26.4	24.5	18.9	1.9	7.5	24.5	11.3
Cars/car parts/other transportation machinery	107	13.1	5.6	6.5	15.0	7.5	12.1	7.5	6.5	15.0	15.9	15.9	13.1	5.6	22.4	22.4	14.0
Precision equipment	70	14.3	10.0	11.4	32.9	17.1	17.1	20.0	15.7	14.3	21.4	21.4	8.6	5.7	8.6	22.9	10.0
Other manufacturing	192	21.9	17.2	9.4	24.5	11.5	18.2	15.6	14.6	21.4	20.8	20.3	13.5	4.2	9.4	21.4	14.1
Non-manufacturing	1,335	21.5	17.6	9.8	23.7	12.0	16.9	13.2	12.0	18.6	18.6	18.1	12.9	4.5	12.6	17.5	14.7
Trade/Wholesale	641	26.5	19.0	11.2	28.4	11.9	19.0	15.9	11.7	20.9	22.3	19.7	15.3	3.6	9.7	15.4	13.4
Retail	80	50.0	52.5	15.0	30.0	12.5	33.8	25.0	18.8	28.8	25.0	30.0	21.3	5.0	6.3	7.5	6.3
Construction	90	12.2	12.2	7.8	23.3	16.7	13.3	7.8	16.7	16.7	14.4	20.0	11.1	8.9	17.8	17.8	12.2
Transport	75	9.3	5.3	4.0	10.7	9.3	10.7	12.0	10.7	12.0	9.3	5.3	1.3	8.0	13.3	21.3	30.7
Finance & insurance	77	-	2.6	2.6	10.4	6.5	-	2.6	9.1	6.5	3.9	6.5	1.3	7.8	27.3	11.7	31.2
Communication, information & software	83	18.1	14.5	13.3	27.7	14.5	15.7	13.3	19.3	24.1	19.3	22.9	16.9	1.2	9.6	30.1	7.2
Professional services	70	5.7	7.1	5.7	18.6	8.6	14.3	8.6	8.6	10.0	12.9	10.0	5.7	2.9	28.6	14.3	14.3
Other non-manufacturing	219	18.3	16.9	9.1	17.4	13.2	15.1	8.7	8.2	16.0	16.9	17.4	12.3	4.6	11.9	24.2	14.2

Note: 1) Percentages to the total number of respondent firms in this survey; (2) Highlighted cells indicate the item gaining the largest percentage in each industry

## **6. Utilization of free trade agreements (FTAs)**

- FTAs used by 45% of all firms, 60% of large-scale firms -

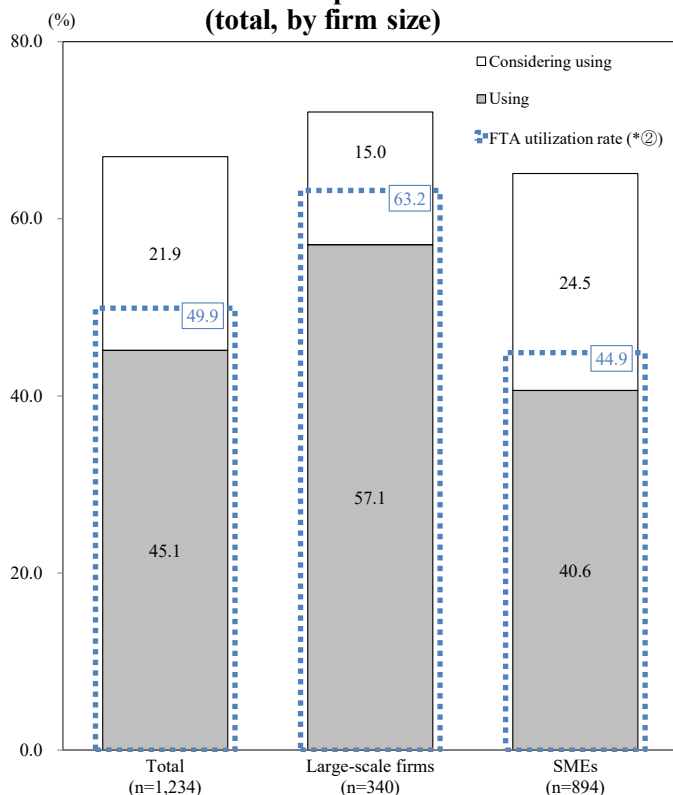
# Status of free trade agreement (FTA) utilization in Japan

## ■ FTAs used by 45% of total firms, 60% of large-scale firms

Of the firms exporting to Japan's FTA partners, 45.1% (557 firms) are using FTAs. If limited to large-scale firms, the percentage increases to 57.1% (194 firms). The percentage further increases to 72.1%, when firms considering using FTAs are added. Although the FTA utilization rate of SMEs is lower than that of large-scale firms, it still exceeds 40% (40.6%, 363 firms).

The parameters for calculating the utilization rate include firms that do not need to use FTAs at 9.6% because no general duties are imposed or because other customs reductions or exemption programs other than FTAs are applied. The Information Technology Agreement (ITA) may be one of the reasons for the especially high percentage of firms that do not need to use FTAs in electrical equipment (17.3%) and IT equipment (25.8%). If such firms are excluded from the parameters, the FTA utilization rate becomes 49.9% for the total, 63.2% for large-scale companies and 44.9% for SMEs.

**Utilization rate of Japan's FTA in force  
(total, by firm size)**



Note: 1) Percentages of firms exporting to any FTA partner (Thailand, Malaysia, Indonesia, the Philippines, Vietnam, other ASEAN, India, Mexico, Chile, Peru, Switzerland, Australia and Mongolia). Although bilateral FTAs are in force with Singapore and Brunei, they are included in "other ASEAN." 2) The FTA utilization rates indicated by dotted lines were calculated after subtracting the number of firms answering "No general duties imposed, or using other customs reduction or exemption program" from the number of firms answering "not using FTAs".

**Utilization rate of Japan's FTA in force (total, by firm size, by industry)**

	Using or considering using (%)			Not using (%)	
	Using or considering using	Using	Considering using	Not using	No general duties imposed, or using other customs reduction or exemption program
Total (n=1,234)	67.0	45.1	21.9	33.0	9.6
Large-scale firms (n=340)	72.1	57.1	15.0	27.9	9.7
SMEs (n=894)	65.1	40.6	24.5	34.9	9.5
Manufacturing (n=836)	69.6	48.2	21.4	30.4	7.7
Food & beverages (n=139)	66.2	43.2	23.0	33.8	5.8
Textiles, clothing (n=35)	80.0	60.0	20.0	20.0	5.7
Chemicals (n=61)	73.8	65.6	8.2	26.2	4.9
Medical products & cosmetics (n=39)	64.1	35.9	28.2	35.9	12.8
Coal & petroleum products, plastics, rubber products (n=47)	74.5	66.0	8.5	25.5	4.3
Iron & steel, non-ferrous metals, metal products (n=79)	67.1	40.5	26.6	32.9	12.7
General-purpose machinery (n=93)	71.0	52.7	18.3	29.0	6.5
Electrical equipment (n=52)	63.5	38.5	25.0	36.5	17.3
IT equipment, electronic parts & devices (n=31)	41.9	22.6	19.4	58.1	25.8
Cars, car parts, other transportation machinery (n=75)	76.0	65.3	10.7	24.0	2.7
Precision equipment (n=45)	82.2	46.7	35.6	17.8	2.2
Other manufacturing (n=96)	66.7	38.5	28.1	33.3	6.3
Non-manufacturing (n=398)	61.6	38.7	22.9	38.4	13.6
Trade, wholesale (n=301)	64.5	44.5	19.9	35.5	14.3
Other non-manufacturing (n=36)	50.0	22.2	27.8	50.0	5.6

Note: Limited to industries with 30 or more firms.

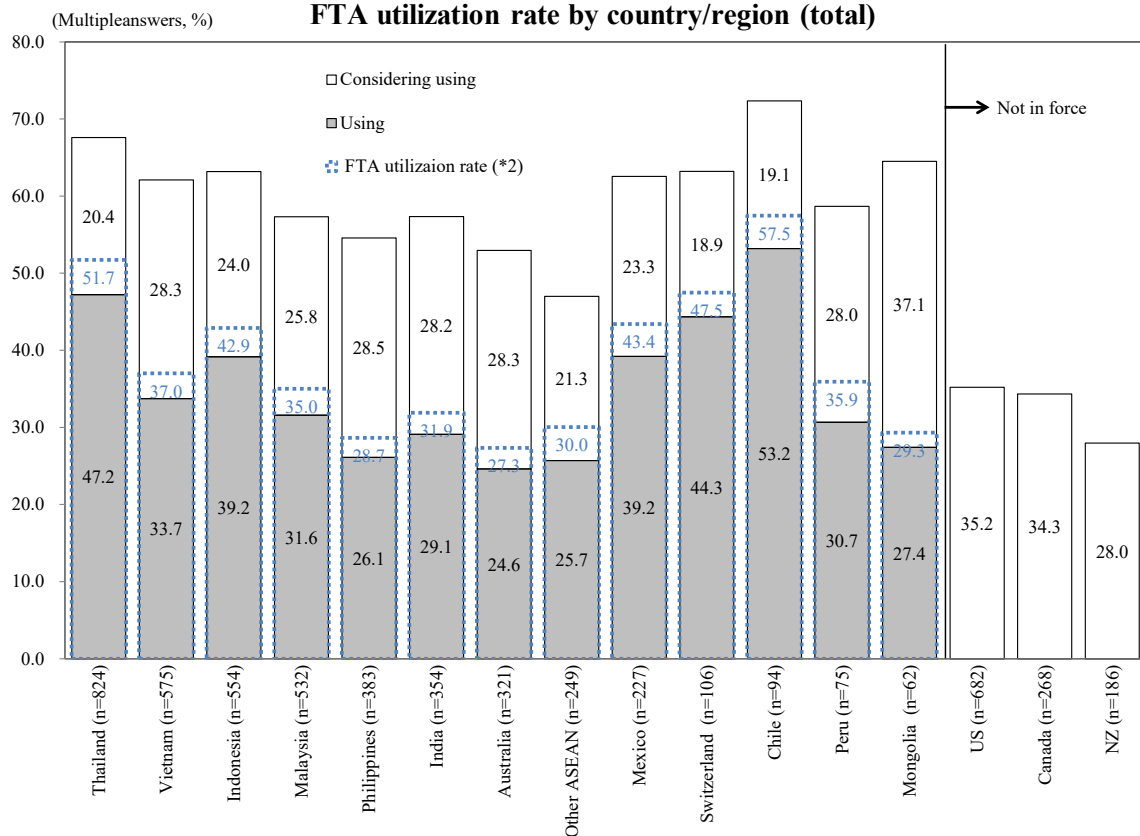
# Japanese firm's FTA use by country/region and by industry

## Many firms use FTAs with ASEAN countries

The most commonly used FTA for exports is that with Thailand (389 firms, utilization rate of 47.2%), followed by Indonesia (217 firms, 39.2%), Vietnam (194 firms, 33.7%) and Malaysia (168 firms, 31.6%). Although many firms are using FTAs for exports to ASEAN countries, the utilization rate is also high with other partners such as Chile (50 firms, 53.2%) and Switzerland (47 firms, 44.3%).

By industry, the number of firms using FTAs is largest in trade and wholesale (134 firms, 44.5%). However, the utilization rates are higher in coal and petroleum products, plastics and rubber products (31 firms, 66.0%) and chemicals (40 firms; 65.6%). The rate for both industries are also high for exports to Thailand. FTAs are frequently used for exporting cars, car parts and other transportation machinery to Indonesia and India, and for exporting ceramics, earth and stone to Vietnam.

FTA utilization rate by country/region (total)



Note: 1) In order of number of firms exporting to the partner country/region. 2) The FTA utilization rate indicated by dotted lines were calculated after subtracting the number of firms answering "No general duties imposed, or using other customs reduction or exemption program" from the number of firms answering "not using FTAs".

Status of FTA use by industry

Rank	Total number of firms exporting to FTA partners (n=1,234)	No. of firms	%
1	Coal & petroleum products, plastics, rubber products	31	66.0
2	Chemicals	40	65.6
3	Cars, car parts, other transportation machinery	49	65.3
4	Textiles, clothing	21	60.0
5	Ceramics, earth & stone	11	55.0
6	General-purpose machinery	49	52.7
7	Precision equipment	21	46.7
8	Wood & wood products, furniture & building materials, paper & pulp	11	45.8
9	Trade, wholesale	134	44.5
10	Food & beverages	60	43.2
11	Retail	7	41.2
12	Iron & steel, non-ferrous metals, metal products	32	40.5
13	Other manufacturing	37	38.5
13	Electrical equipment	20	38.5
15	Medical products & cosmetics	14	35.9

Note: 1) Percentages of firms exporting to more than one target country/region. "No. of firms" is the number of firms answering "using" FTAs. Industries with ten or more firms are ranked in order of utilization rate. 2) Each percentage is the ratio of firms using FTAs to the total number of firms in the industry.

## **7. International standardization**

- More than one-third of firms take measures related to international standardization -

# Measures and staff for international standardization

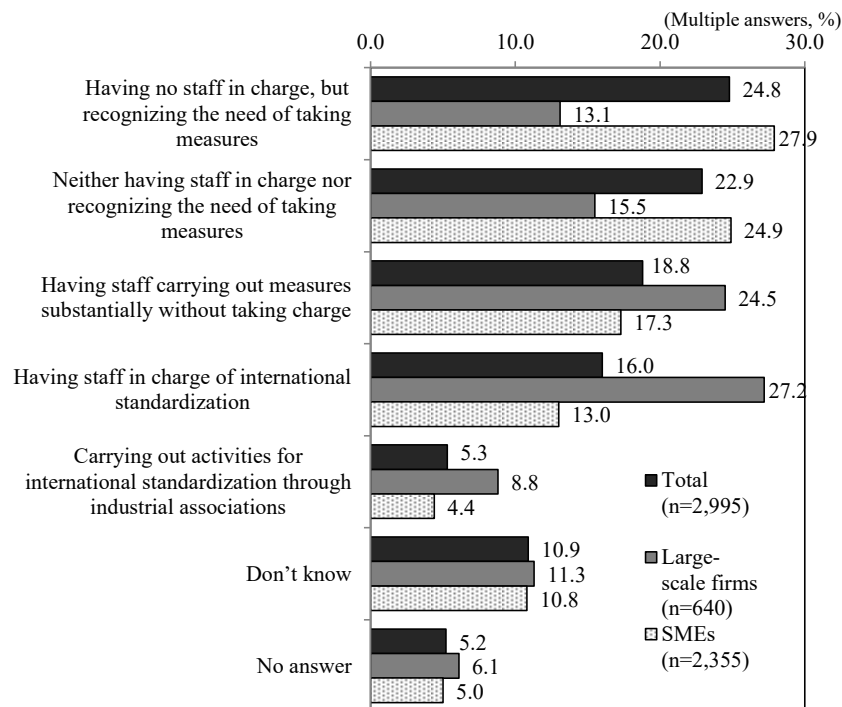
## More than one-third of firms take certain measures related to international standardization

Regarding products, services, systems, etc., 37.0% (1,109 firms) of all the respondents have carried out some measures for international standardization, such as the acquisition of certificates for existing international standards or efforts for new international standardization (firms answering that they “have staff in charge of international standardization,” “have staff carrying out measures substantially without taking charge” or are “carrying out activities for international standardization through industrial associations,” excluding duplication).

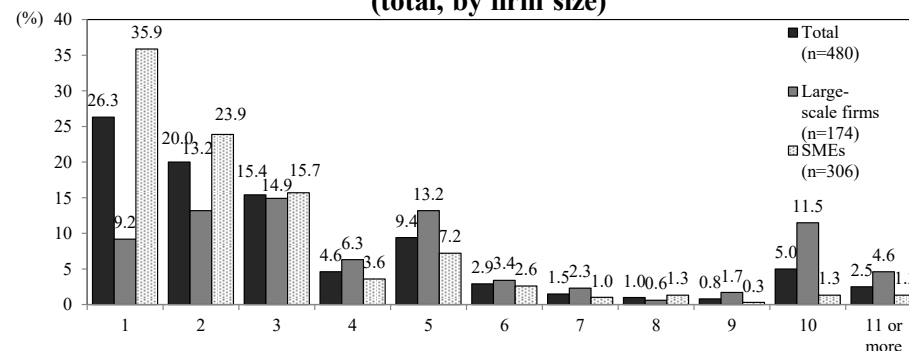
## More than 60% have “three or fewer” staff members in charge or carrying out the measures

Regarding staff engagement in international standardization, 16.0% of the respondent firms answered that they “have staff in charge of international standardization” while 18.8% “have staff carrying out measures substantially.” Regarding the number of staff in charge, a majority of the responding firms have one (26.3%), two (20.0%) or three (15.4%). Regarding the number of staff carrying out measures substantially, a majority also responded with one (30.1%), two (22.9%) or three (11.5%). In the case of SMEs especially, an overwhelming number of firms answered “one” concerning both the number of staff in charge and the number of staff carrying out measures substantially (35.9% and 38.8%, respectively).

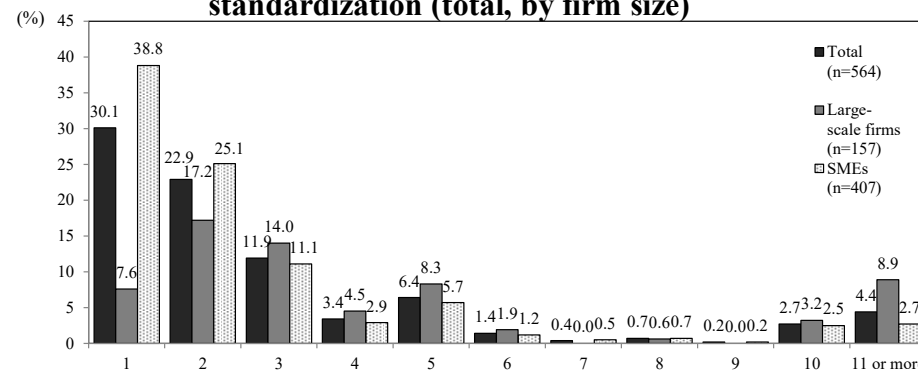
Staff carrying out measures for international standardization  
(total, by firm size)



Number of staff in charge of international standardization  
(total, by firm size)



Number of staff carrying out measures for international standardization (total, by firm size)



# Activities related to international standardization

## ■ Of firms carrying out measures for international standardization, 80% answered “acquisition of certificates for existing international standards”

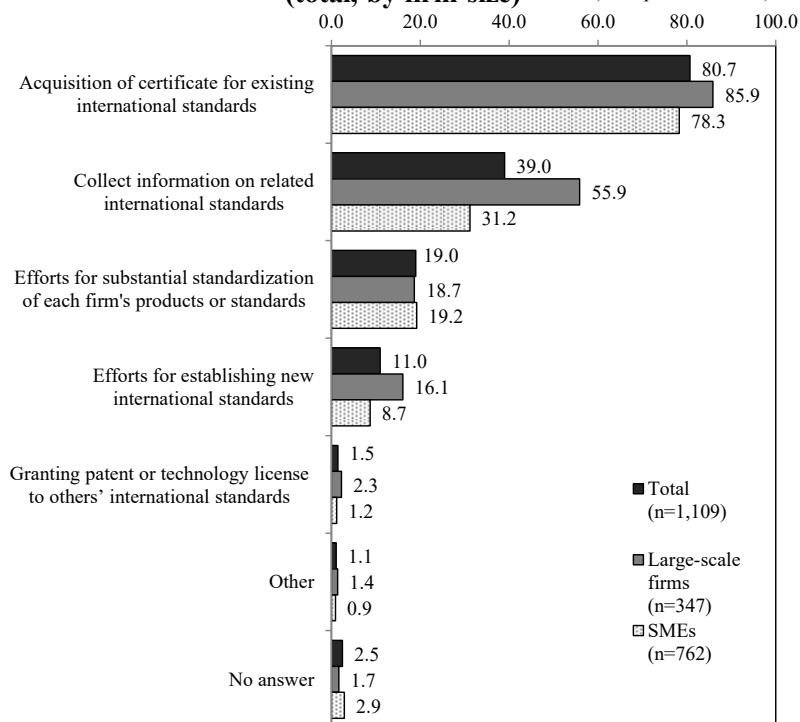
Regarding firms' activities related to international standardization, 80.7% of the firms carrying out measures chose “acquisition of certificates for existing international standards” as a measure. The percentage of firms choosing this measure is the highest for all the industries. This is followed by “collecting information on related international standards” (39.0%), “efforts for substantial standardization of each firm's products or standards” (19.0%) and “efforts for establishing new international standards” (11.0%).

## ■ Percentage of firms conducting “efforts for substantial standardization” slightly higher than those conducting “efforts for establishing new international standards”

By industry, the percentage of firms answering that they are conducting “efforts for substantial standardization” is especially high in precision equipment (37.2%); retail (30.0%); coal and petroleum products, plastics and rubber products (28.8%); and communication, information and software (26.1%). The percentage of firms answering with “efforts for establishing new international standards” is high in electrical equipment (20.7%); precision equipment (18.6%); communication, information and software (17.1%); and food and beverages (16.1%).

Measures related to international standardization

(total, by firm size) (Multiple answers, %)



Note: Percentages to the total number of firms answering “having staff in charge of international standardization,” “having staff carrying out measures substantially without taking charge” or “carrying out activities for international standardization through industrial associations”; excluding duplication

Measures related to international standardization (by industry)

(Multiple answers, %)

	No. of firms	Acquisition of certificate for existing international standards	Collect information on related international standards	Efforts for establishing new international standards	Efforts for substantial standardization of each firm's products or standards	Granting patent or technology licenses to others' international standards	Other	No answer
Total	1,109	80.7	39.0	11.0	19.0	1.5	1.1	2.5
Manufacturing	810	81.1	41.5	12.5	21.2	2.0	1.1	2.8
Food & beverages	174	75.9	36.2	16.1	22.4	1.1	1.7	2.9
Textiles, clothing	23	56.5	26.1	8.7	17.4	4.3	13.0	8.7
Wood & wood products, furniture & building materials, paper & pulp	19	84.2	42.1	10.5	10.5	-	-	5.3
Chemicals	61	83.6	47.5	6.6	21.3	3.3	1.6	1.6
Medical products & cosmetics	21	76.2	57.1	14.3	23.8	-	-	4.8
Coal & petroleum products, plastics, rubber products	52	75.0	36.5	9.6	28.8	-	-	1.9
Ceramics, earth & stone	11	81.8	27.3	-	18.2	-	-	-
Iron & steel, non-ferrous metals, metal products	94	86.2	29.8	7.4	14.9	1.1	-	3.2
General machinery	73	84.9	34.2	13.7	21.9	2.7	-	4.1
Electrical equipment	58	84.5	58.6	20.7	17.2	1.7	-	1.7
IT equipment, electronic parts & devices	35	88.6	60.0	17.1	25.7	2.9	-	-
Cars, car parts, other transportation machinery	65	89.2	38.5	9.2	20.0	1.5	1.5	6.2
Precision equipment	43	88.4	58.1	18.6	37.2	2.3	-	2.3
Other manufacturing	81	76.5	46.9	9.9	17.3	4.9	1.2	-
Non-manufacturing	299	79.6	32.1	7.0	13.0	0.3	1.0	1.7
Trade and wholesale	156	78.2	32.1	4.5	13.5	0.6	1.3	1.9
Retail	10	70.0	30.0	10.0	30.0	-	-	-
Construction	31	96.8	29.0	12.9	12.9	-	-	-
Transport	30	90.0	20.0	6.7	10.0	-	-	3.3
Communication, information & software	23	73.9	17.4	13.0	26.1	-	-	-
Professional services	10	80.0	40.0	10.0	-	-	-	10.0
Other non-manufacturing	32	78.1	46.9	9.4	6.3	-	-	-

Note: 1) Highlighted cells indicate the top five industries for each answer, excluding the items chosen by five or less firms. 2) Limited to industries with ten or more respondent firms.

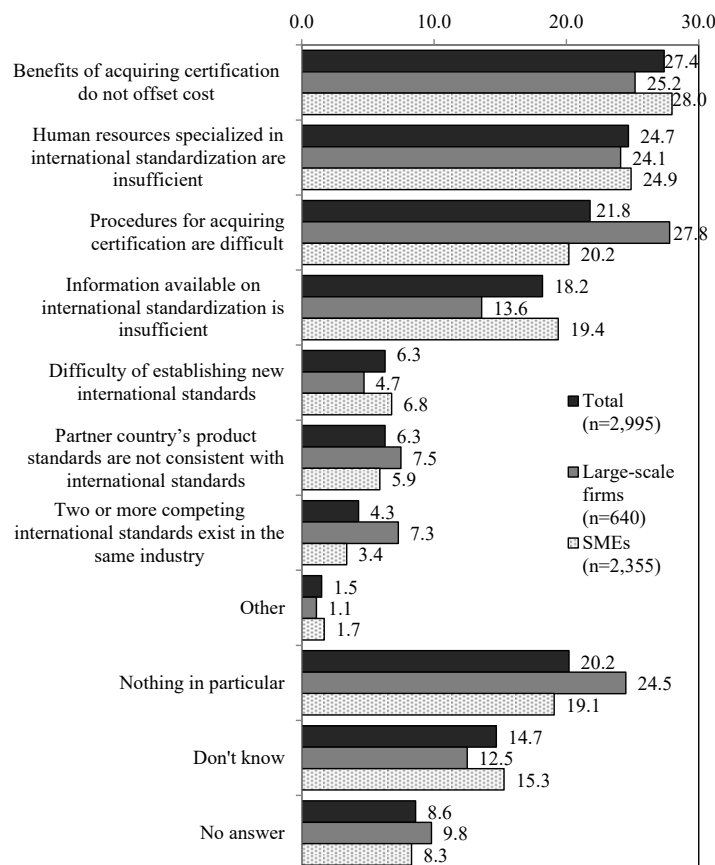
# Issues regarding international standardization

## ■ “Benefits of acquiring certification do not offset cost” cited as largest issue regarding international standardization

Responding to the question on issues regarding international standardization, many firms identified the following problems: “benefits of acquiring certification do not offset cost” (27.4% of all respondents), “human resources specialized in international standardization are insufficient” (24.7%) and “procedures for acquiring certification are difficult” (21.8%). The percentage of firms choosing the largest issue, “benefits of acquiring certification do not offset cost,” was especially high in IT equipment, electronic parts and devices (49.1%); electrical equipment (41.7%); and general machinery (40.1%). By firm size, 27.8% of large-scale companies stated that “procedures for acquiring certification are difficult.” The percentage of SMEs answering with “information available on international standardization is insufficient” was 19.4%, which is higher than the percentage of large-scale companies answering the same.

### Issues regarding international standardization

(total, by firm size) (Multiple answers, %)



### Issues regarding international standardization (by industry)

(Multiple answers, %)

	No. of firms	Partner country's product standards are not consistent with international standards	Procedures for acquiring certification are difficult	Benefits of acquiring certification do not offset cost	Two or more competing international standards exist in the same industry	Human resources specialized in international standardization are insufficient	Difficulty of establishing new international standards	Information available on international standardization is insufficient	Other	Nothing in particular	Don't know	No answer
Total	2,995	6.3	21.8	27.4	4.3	24.7	6.3	18.2	1.5	20.2	14.7	8.6
Manufacturing	1,660	7.5	28.4	32.2	6.1	30.2	7.8	19.5	1.6	15.2	13.0	7.1
Food & beverages	394	6.3	26.6	33.2	5.6	28.7	6.9	20.3	2.5	14.5	11.9	8.6
Textiles, clothing	103	2.9	13.6	16.5	1.9	23.3	6.8	22.3	-	17.5	20.4	12.6
Wood & wood products, furniture & building materials, paper & pulp	62	8.1	24.2	19.4	3.2	30.6	6.5	19.4	-	16.1	25.8	6.5
Chemicals	92	9.8	37.0	38.0	12.0	27.2	6.5	17.4	2.2	15.2	12.0	3.3
Medical products & cosmetics	59	8.5	25.4	28.8	1.7	30.5	8.5	20.3	1.7	15.3	11.9	10.2
Coal & petroleum products, plastics, rubber products	94	5.3	21.3	31.9	9.6	27.7	4.3	16.0	1.1	20.2	13.8	6.4
Ceramics, earth & stone	28	3.6	21.4	32.1	3.6	28.6	10.7	10.7	-	21.4	10.7	14.3
Iron & steel, non-ferrous metals, metal products	168	7.7	26.2	29.2	8.9	30.4	7.1	20.2	1.2	13.7	12.5	7.1
General machinery	142	12.7	31.0	40.1	5.6	30.3	9.2	23.9	1.4	16.2	8.5	4.2
Electrical equipment	96	9.4	39.6	41.7	7.3	41.7	11.5	25.0	2.1	6.3	7.3	11.5
IT equipment, electronic parts & devices	53	7.5	34.0	49.1	7.5	43.4	9.4	24.5	1.9	7.5	13.2	1.9
Cars, car parts, other transportation machinery	107	9.3	26.2	29.0	7.5	35.5	3.7	17.8	-	18.7	11.2	4.7
Precision equipment	70	8.6	38.6	38.6	5.7	25.7	8.6	12.9	4.3	20.0	11.4	2.9
Other manufacturing	192	6.3	32.8	28.1	4.2	28.6	12.0	15.6	1.6	15.1	16.1	5.7
Non-manufacturing	1,335	4.7	13.7	21.3	1.9	17.9	4.4	16.5	1.4	26.5	16.8	10.6
Trade and wholesale	641	5.9	17.0	24.2	3.3	17.8	3.7	20.1	1.9	23.4	14.0	10.9
Retail	80	7.5	13.8	21.3	1.3	16.3	5.0	16.3	2.5	27.5	22.5	6.3
Construction	90	5.6	11.1	25.6	-	25.6	7.8	18.9	1.1	25.6	17.8	6.7
Transport	75	5.3	12.0	32.0	2.7	25.3	4.0	12.0	-	26.7	14.7	8.0
Finance & insurance	77	-	1.3	3.9	-	5.2	-	2.6	-	50.6	13.0	26.0
Communication, information & software	83	1.2	8.4	16.9	1.2	24.1	9.6	14.5	1.2	26.5	21.7	7.2
Professional services	70	4.3	10.0	8.6	-	12.9	4.3	14.3	-	31.4	12.9	17.1
Other non-manufacturing	219	2.7	13.2	19.6	0.5	16.9	4.6	12.8	1.4	25.6	23.7	7.3

Note: Highlighted cells indicate items chosen by 20% or more of the firms in each industry.

## **FY2016 Survey on the International Operations of Japanese Firms**

**- JETRO Overseas Business Survey -**

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Note: Figures may not sum up to the total because some are less than one unit.

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