Quarterly Survey of Overseas Subsidiaries (Survey from January to March 2016)

$\sim~$ Summary of the Results $~\sim~$



June 24, 2016

Research and Statistics Department Ministry of Economy, Trade and Industry

1 About the Quarterly Survey of Overseas Subsidiaries

(1) Outline of the Survey

I Purpose of the survey

The purpose of this survey is to promote flexible policymaking for both the economy and industry, by understanding the dynamic changes in the overseas activities of Japanese companies.

I Legal basis of the survey

The survey is conducted by the Ministry of Economy, Trade and Industry with approval under the Statistics Act. III Date of the survey

The survey was based on the period ending on the last day of March 2016. (The deadline for submitting survey responses for this quarter was May 16, 2016.)

 ${\rm I\!V}$ Coverage of the Survey

The survey covers Japanese companies that met all the following criteria as of the end of March 2015: All industries except finance, insurance, and real estate; companies with 100 million yen or more in capital; companies with 50 or more employees; companies with overseas subsidiaries.

This survey also targets overseas subsidiaries of the above Japanese parent companies (including overseas subsidiaries that were established during the term of the survey) that meet all of the following criteria as of the end of the surveyed quarter: manufacturing companies; companies with 50 or more employees; companies with 50% or more of their capital coming from parent companies, including both direct and indirect funds (such as funds provided via local subsidiaries).

V Method of the Survey

The survey was conducted via mail, using self-declarations submitted by Japanese parent companies.

VI Survey Items

The survey covers actual figures and Diffusion Index (business confidence) for sales, capital investment, and number of employees.

VII Response Rate

The responses to the survey for this quarter are summarized below:

Number of companies covered by the survey (overseas subsidiaries)	Number of companies that responded	Response rate st
5,174	4,153	80.3%

*Response rate it was calculated by the valid responses

(2) Notes on Use

I Adjustments to deal with gaps in reported values

Previously omitted parts were added, starting with the April–June quarter every year, resulting in a gap between results for current quarters and those for previous quarters. Therefore, comparisons between the current quarter and the corresponding quarter of the previous year are calculated and estimated by totaling the figures only for overseas subsidiaries (newly established companies included) continuously subject to the survey since the corresponding quarter of the previous year.

I Revisions to statistical data

Statistical data for the current quarter are preliminary results. They are revised at the time of publication of the survey report for the next quarter.

Annual revisions are conducted once a year at the time of publication of the survey report for the April-June quarter. Statistical data for the previous year were retroactively revised and fixed.

Ⅲ Tabulation method

Data for all companies covered by the survey is tabulated after estimating the results for companies that did not submit responses, based on the following formula in each region and sector (the number of employees given in the previous quarter is used in the case of employees). All items are estimated except the capital investment.

Estimated values for this quarter for companies not submitting data =

Value for the corresponding quarter in the previous year for relevant companies \times

Total values for this quarter for companies that submitted data both this quarter and in the same quarter of the previous year

Total values for the same quarter of the previous year for comapanies that submitted data both this quarter and in the same quarter of the previous year

 ${f N}$ Classification of countries and regions

- i North America:
- the United States and Canada
- ii Asia

①ASEAN4: Indonesia, Thailand, the Philippines, and Malaysia

- ②NIEs3: Singapore, Taiwan, and Korea
- ③China: including Hong Kong

④Other Asian countries: India, Cambodia, Sri Lanka, Pakistan, Bangladesh, Brunei, Vietnam, Myanmar, and Laos

iii Europe:

Ireland, the United Kingdom, Italy, Ukraine, Austria, the Netherlands, Greece, Swiss, Sweden, Spain, Slovakia, the Czech Republic, Denmark, Germany, Turkey, Hungary, Finland, France, Bulgaria, Belgium, Poland, Portugal, Montenegro, Luxembourg, Romania, and Russia

iv Other:

Argentina, Israel, Uruguay, Egypt, El Salvador, Australia, Guatemala, Costa Rica, Columbia, Saudi Arabia, Samoa, Swaziland, Tanzania, Tunisia, Chile, Nigeria, New Zealand, Brazil, Venezuela, Peru, South Africa, Mexico, and Morocco

V Regarding listed currencies

Amounts listed in local currencies are analyzed by converting them into U.S. dollars at the average exchange rate for the quarter announced by the IMF.

		FY2014	FY2015			
		Jan.−Mar.	AprJun.	JulSep.	OctDec.	JanMar.
Japan	Yen	119.09	121.33	122. 25	121.51	115.49
ASEAN4	Indonesia (Rupiah)	12798.6	13133.8	13850. 9	13774. 3	13532.6
	Malaysia (Ringgit)	3. 6190	3. 6594	4. 0600	4. 2900	4. 2000
	Philippines (Peso)	44. 424	44. 669	46.050	46.870	47. 290
	Thailand (Baht)	32.651	33. 263	35. 250	35.840	35. 670
NIEs3	Republic of Korea (Won)	1100.00	1097. 10	1170.40	1157. 10	1202.10
	Singapore (Singapore dollar)	1. 3563	1. 3435	1. 3900	1.4100	1. 4000
	Taiwan (New Taiwan dollar)	31. 5920	30. 9870	32. 2060	32. 8450	33. 3500
China	People's Public of China (Yuan)	6. 1374	6. 1200	6. 2600	6. 3900	6. 5400
	Hong Kong (Hong Kong dollar)	7. 755	7. 751	7.750	7. 750	7. 770
Europe	United Kingdom (Pound) $^{\!$	1.515	1. 533	1.550	1. 520	1. 430
	Euro Area (Euro)	0. 8881	0.9055	0. 9000	0.9100	0.9100

Exchange rates of major currencies against the U.S. dollars (average term rates published by IMF "IFS")

₩U.S. dollars per U.K. pound

VI Industrial Classification

Industrial Classification is based on the Japan Standard Industrial Classification (JSIC).

Based on sales, the four major industry sectors out of the total of 12 are "Chemicals", "General-purpose machinery (general-purpose, production, and business-oriented machinery)", "Electrical machinery", and "Transportation equipment".

Industry Classification	Japan Standard Industrial Classification(Code)
FOOD AND TABACCO	Manufacture of food (09), manufacture of beverages, tabacco and feed (10)
TEXTILES	Manufacture of textile mill products (11)
LUMBER, PULP, PAPER AND PAPER PRODUCTS	Manufacture of lumber and wood products, except fourniture (12), Manufacture of pulp, paper and paper products (14)
CHEMICALS	Manufacture of Chemical and allied products (16)
CERAMIC, STONE AND CLAY PRODUCTS	Manufacture of ceramic, stone and clay products (21)
IRON AND STEEL	Manufacture of iron and steel (22)
NON-FERROUS METALS	Manufacture of non-ferrous metals and products (23)
FABRICATED METAL PRODUCTS	Manufacture of fabricated metal products (24)
GENERAL-PURPOSE, PRODUCTION AND BUSINESS ORIENTED MACHINERY	Manufacture of general-purpose machinery (25), Manufacture of production machinery (26), Manufacture of business oriented machinery (27)
ELECTRICAL MACHINERY	Electronic parts, devices and electronic circuits (28), Manufacture of electrical machinery, equipment and supplies (29), Manufavture of information and communication electronics equipment (30)
TRANSPORTATION EQUIPMENT	Manufacture of transportation equipment (31)
MISCELLANEOUS MANUFACTURING INDUSTRIES	Manufacture of furniture and fixtures (13), Printing and allied industries (15), Manufacture of petroleum and coal products (17), Manufacture of plastic products, except otherwise classified (18), Manufacture of rubber products (19), Manufacture of tanning, leather products and fur skins (20), Miscellaneous manufacturing industries (32)

2 Overview

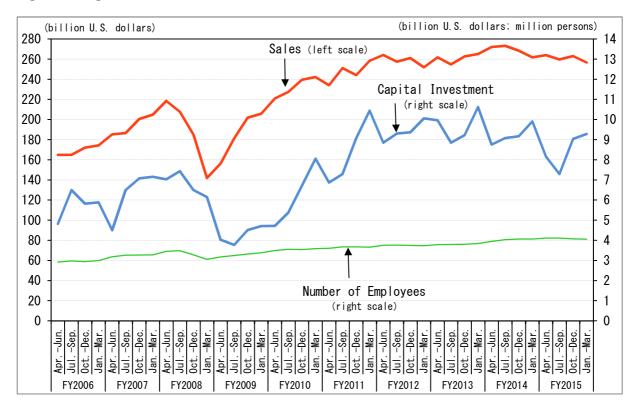


Fig. 2-1 Long-Term Trends in Sales, etc. of Overseas Subsidiaries

Fig. 2-2 Diffusion Index (DI) for Sales Forecast (Current DI and Next DI)

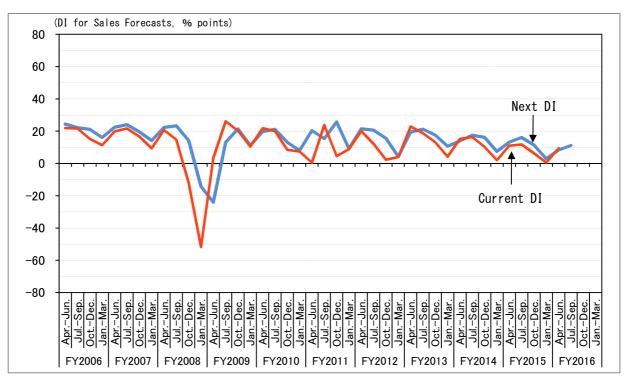


Fig. 2-3 Summary Table of the Survey

			S	ales			Capital	Investmer	nt	N	umber o	of Employe	es
		Resu JanMar		Forecasts Current DI AprJun. 2016	Forecasts Next DI JulSep. 2016	Resu JanMai		Forecasts Current DI AprJun. 2016	Forecasts Next DI JulSep. 2016	Resu End of Ma		Forecasts Current DI Jun. 2016	Forecasts Next DI Sep. 2016
		Billion USD	y∕y%chg.	%points	%points	Billion USD	y/y % chg.	%points	%points	Mil. Persons	y∕y% chg.	%points	%points
All Reg	ions	256.7	-3.4	9.3	11.1	9.28	-17.3	11.4	6.8	4.056	-1.8	4.4	2.3
Chem	nicals	18.9	-3.1	11.4	12.8	0.59	4.7	7.6	6.1	0.170	1.2	9.1	9.1
Gene	ral-purpose machinery	22.2	-8.6	5.7	10.6	0.59	-22.3	12.7	9.4	0.433	-1.5	7.3	0.9
Electr	rical machinery	38.5	-13.5	15.3	12.8	0.97	-4.8	8.4	6.7	1.023	-6.7	0.7	0.5
Trans	sportation equipment	141.3	1.4	2.6	3.3	5.47	-24.5	10.6	3.6	1.558	1.4	3.8	2.8
Nor	th America	85.9	3.9	6.5	4.5	2.75	-17.4	7.5	4.9	0.543	1.1	8.6	4.2
[Chemicals	5.5	6.1	6.9	6.8	0.17	6.7	5.7	0.0	0.025	2.4	25.6	18.6
	General-purpose machinery	8.2	4.3	1.6	0.0	0.24	-11.0	16.1	5.4	0.055	0.8	15.8	-3.1
E	Electrical machinery	7.3	-4.7	-2.0	4.1	0.08	40.0	2.7	-2.7	0.057	0.6	5.8	6.0
	Transportation equipment	53.2	5.6	4.6	-6.4	2.05	-24.1	3.3	5.3	0.262	1.4	3.0	1.8
Asia	a	120.6	-8.0	9.8	13.5	4.44	-18.4	12.3	7.2	2.849	-3.5	3.5	1.6
	Chemicals	7.7	-11.5	13.9	15.5	0.32	-3.6	6.9	6.9	0.110	0.7	7.5	9.3
(General-purpose machinery	10.5	-17.3	7.5	15.4	0.30	-22.9	12.7	9.0	0.339	-1.6	6.3	1.0
E	Electrical machinery	25.0	-16.8	16.4	12.6	0.84	-6.1	8.8	7.1	0.894	-7.8	-0.6	-1.5
	Transportation equipment	60.5	0.3	3.1	10.3	2.09	-29.1	13.6	4.3	0.917	0.1	4.2	3.4
	ASEAN 4	45.2	-8.7	5.1	10.3	1.76	-23.2	11.6	5.6	1.143	-1.6	3.4	0.7
	Chemicals	2.6	-6.2	11.0	11.1	0.16	-6.4	6.0	2.5	0.043	1.4	4.4	7.7
	General-purpose machinery	2.4	-14.5	11.9	15.8	0.12	-18.6	12.2	7.5	0.117	0.4	10.5	5.3
	Electrical machinery	8.5	-14.4	12.8	9.4	0.42	5.3	8.2	6.8	0.351	-3.5	-0.6	-4.1
	Transportation equipment	25.0	-5.0	-4.2	7.8	0.81	-40.1	9.9	0.0	0.397	0.2	1.6	-0.8
	NIEs 3	11.5	-16.5	15.3	7.7	0.33	15.3	11.5	8.2	0.136	-1.9	8.2	4.8
	Chemicals	2.7	-18.4	17.0	11.4	0.08	-3.1	-4.4	0.0	0.017	0.3	12.0	10.0
	General-purpose machinery	1.4	-15.1	2.6	7.7	0.01	-16.6	32.2	25.8	0.021	1.8	11.4	-2.9
	Electrical machinery	3.2	-20.2	10.2	2.1	0.05	-6.4	8.4	-8.5	0.038	-3.1	0.0	0.0
	Transportation equipment	1.9	-13.7	13.8	-14.3	0.08	44.3	3.6	14.8	0.018	-0.3	3.6	7.4
	China (incl. Hong Kong)	52.1	-6.6	11.3	13.4	1.39	-21.6	12.5	7.4	1.102	-7.4	0.7	-0.4
	Chemicals	1.9	-9.9	14.5	19.2	0.06	-2.1	9.8	10.9	0.035	-1.7	6.4	9.3
	General-purpose machinery	5.9	-19.6	3.7	14.2	0.11	-15.5	7.7	5.6	0.154	-3.5	1.2	-1.3
	Electrical machinery	12.0	-18.7	18.7	13.4	0.31	-20.9	8.2	8.3	0.400	-12.9	-1.7	-2.4
	Transportation equipment	25.7	9.3	7.7	10.7	0.49	-24.2	17.6	8.7	0.299	-2.7	2.2	3.5
Eur	оре	32.1	-0.8	2.8	-3.1	1.40	7.5	10.4	7.3	0.371	4.2	2.9	4.0
ſ	Chemicals	5.4	1.6	0.0	-2.5	0.09	32.0	16.2	2.7	0.032	1.2	5.0	0.0
	General-purpose machinery	3.3	-1.1	5.0	-3.3	0.05	-38.2	11.6	7.7	0.033	-0.5	8.5	3.4
F	Electrical machinery	5.4	2.5	13.9	11.4	0.04	-18.1	3.6	14.8	0.040	2.6	2.8	11.4
-	Transportation equipment	13.0	-2.6	-13.8	-26.2	0.73	18.4	1.4	-1.4	0.176	5.5	-4.0	0.0

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URL

http://www.meti.go.jp/english/statistics/tyo/genntihou/index.html

Time series tables for past data are available on the website at the above address.