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SRI International

MARKET SURVEY RESULTS

FOR

**JOINT U.S.-THAI BUSINESS ORGANIZATION
(JUST BUSINESS)**

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EXECUTIVE SUMMARY

This market survey of 88 firms in Thailand was undertaken on behalf of SRI International in order to provide support data for the development of a business plan for the Joint U.S.-Thai Business Organization. Key objectives of the survey include:

1. determining the most appropriate activities for JUST Business
2. determining the most appropriate sectors for JUST Business focus
3. development of support data for design of specific program components
4. developing a list of firms which have indicated an interest in taking part in future JUST Business activities

JUST Business Activities

Survey findings indicate strong support for the JUST Business organization as originally conceived. At least 65 percent of respondents supported all types of activities put forth in the original plan including:

- Trade and Investment Information Services
- General Trade Promotion Services
- Trade Matchmaking Services
- Trade and Investment Policy Analysis
- General Investment Promotion Services
- Investment Matchmaking Services

Interviews with the local business community revealed, however, that there is concern that JUST Business activities may duplicate the efforts of existing agencies and organizations, particularly in the area of trade which falls under the scope of the U.S. & FCS and Thailand's Department of Export Promotion. The consensus was that JUST Business efforts relating strictly to trade should be channeled through such agencies to augment their existing programs and capabilities.

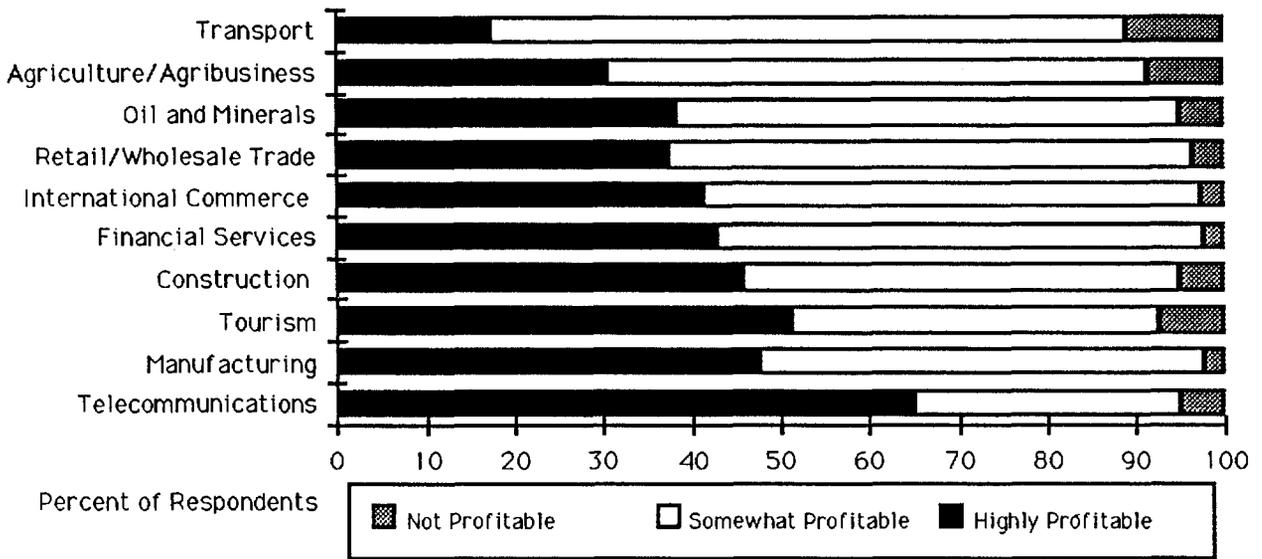
There is also recognition in the business community that JUST Business is a development project with all survey respondents expressing a desire for program components in areas of traditional USAID focus. Specifically, respondents would like to JUST Business pursue projects or components which:

- encourage technology transfer and manpower training
- encourage development of business opportunities for small and medium-sized firms (both U.S. and Thai)
- encourage business development outside of Metropolitan Bangkok
- encourage development of employment opportunities for the rural poor
- encourage business development in the agricultural sector

Sector Focus

The business community is extremely bullish about the investment prospects for all sectors in the Thai economy with almost 90 percent of survey respondents ranking investment opportunities for all sectors of the economy as profitable or very profitable as depicted in the chart below.

Ranking of Investment Opportunities in Thailand



A distillation of survey responses and interviews provided the following criteria for determining the most appropriate sectors for the "proactive" activities to be undertaken by JUST Business.

1. Sectors which have been identified as having high profit potential by the survey
2. Sectors for which Thailand seeks substantial growth
3. Sectors which constitute areas of existing or traditional USAID focus
4. Sectors which have been targeted by other agencies or organizations so that JUST Business will be able to leverage its resources
5. Sectors which constitute industries in which small and medium U.S.-based firms have particular technical strengths and needs
6. Sectors which represent industries in which Thailand-based firms have shown a particularly strong interest, especially in the areas of joint ventures and procurement of U.S. goods and services.

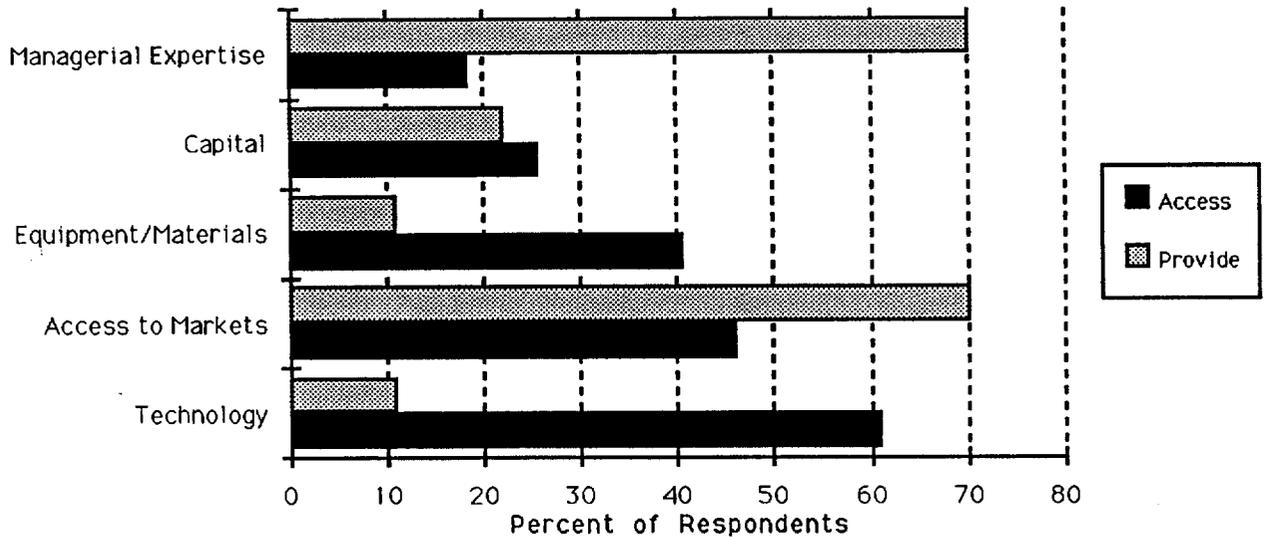
The following six sectors meet the criteria established above.

- High value-added agriculture
- Physical infrastructure (construction and related services)
- Environmental control
- Banking and related financial services
- Energy and energy conservation
- Manufacturing support industries

Interest in Bilateral Trade and Investment

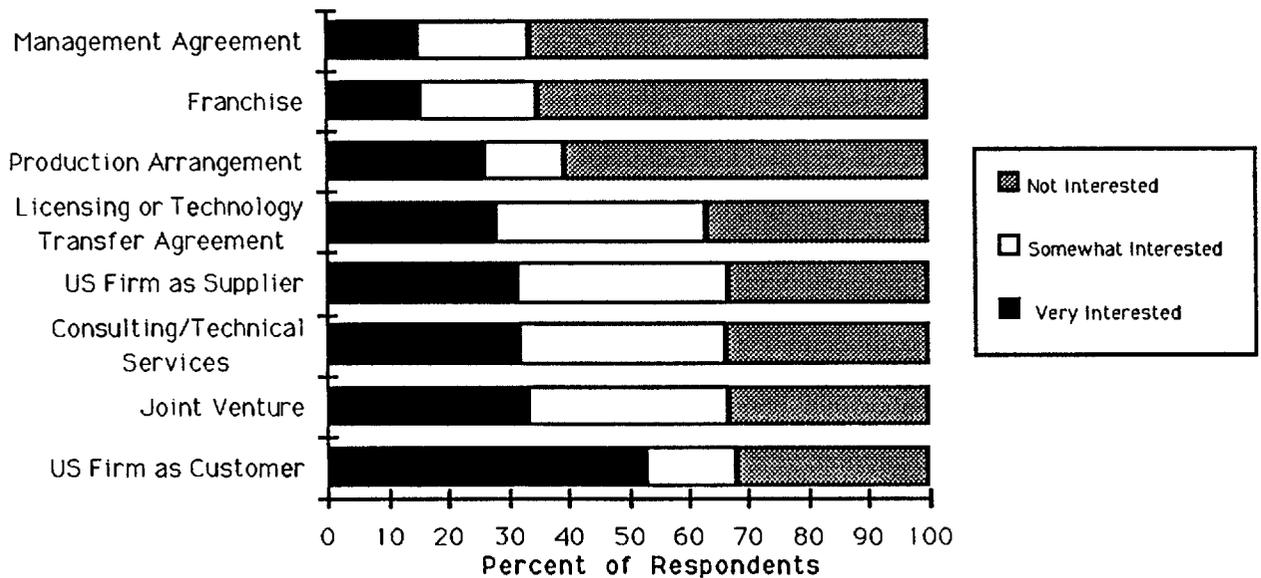
More than 60 percent of the firms in the sample group expressed interest in developing new or additional commercial ties with U.S. companies. Local firms are most interested in accessing U.S. technology, markets, equipment and materials and would like to offer their managerial expertise and access to the Thai market to U.S. companies. The following chart summarizes resources local firms seek from and have to offer U.S. counterparts.

Resources Local Firms Would Like to Access/Offer U.S. Companies



Business collaboration between U.S. and Thai based firms may take a variety of formats as outlined in the chart below. Approximately two-thirds of the respondents stated they would like to find new or additional American customers. An equal number would like to find U.S. suppliers. There is also strong interest in joint ventures, consulting/technical services, and licensing arrangements.

Interest in Business Collaboration by Form



OBJECTIVES

This market survey of the private sector in Thailand was undertaken on behalf of SRI International to provide information relevant to the development of a business plan for the U.S.A.I.D. proposed bilateral trade and investment promotion organization, JUST Business (Joint U.S.-Thai Business). The survey was designed with the aim of collecting quantitative and qualitative information with particular focus on identifying

1. high potential areas for bilateral trade and investment transactions.
2. the nature of input requirements for the high potential areas.
3. current sources of supply for firms operating in Thailand.
4. the specific conditions necessary for U.S. firms to develop a successful commercial presence in Thailand.
5. appropriate activities for JUST Business.

METHODOLOGY

The research team used two principal vehicles for data collection. The first was a forty-six question self-administered survey. The survey instrument was divided into five sections as follows with the aim of collecting information on purchasing criteria and patterns, attitudes towards trade and investment opportunities, level of interest in expanding bilateral commercial activities, and attitudes on proposed JUST Business program components.

1. Background
2. Manufacturing Inputs
3. Capital Equipment
4. Services
5. Business Opportunities

The second principal research vehicle was a follow-up interview which was conducted with survey respondents in order to uncover issues not explicitly addressed in the questionnaire and to gather more detailed and quantitative information regarding responses to survey questions.

In addition, an eight question supplemental survey was administered to firms in the agribusiness sector in order to gather more detailed information on specific agriculture related business opportunities.

Questionnaires were delivered to target firms in November and December of 1990 under the auspices of the American Chamber of Commerce and the Thai Chamber of Commerce. The target sample included American, Thai, and third-country firms with operations in Thailand. While the focus of the survey was American and Thai firms in the manufacturing and agribusiness sectors, the sample did comprise a significant number of firms in the trade and services sectors. Target firms were identified primarily through directories for the American Chamber of Commerce in Thailand and the Thai Chamber of Commerce.

Response Rate

The target sample comprised 147 firms, 88 of which returned completed questionnaires by the cut-off date of February 4, 1991 representing a response rate of 60 percent. Follow-up interviews were conducted with 35 of the responding firms (40 of the respondents). A total of 11 firms in the agribusiness sector completed the primary questionnaire with 9 of those filling out the agribusiness supplement.

SAMPLE CHARACTERISTICS

The following section details background information on the survey sample.

Nationality of Shareholdings

Approximately 71 percent of the survey respondents have American shareholdings ranging from 7.3 to 100 percent. American firms in the sample, on average, maintain 79.6 percent of total shareholdings. Forty-five percent of the sample comprises firms with Thai shareholdings ranging from 10 to 100 percent and averaging 60.3 percent Thai shareholdings. Thirty-four percent of companies have shareholdings from third countries averaging 47.2 percent third country holdings with a range of 1.5 to 100 percent.

Table 1 Nationality of Shareholdings

	Number of Firms	Percent of Firms	n
Firms with US Shareholdings	63	71.59%	88
Firms with Thai Shareholdings	40	45.45%	
Firms with Other Shareholdings	30	34.09%	

Nationality of Respondents

The nationality of individuals responding to the survey instrument often did not correspond to the shareholdings of the firm. All respondents were senior level managers. Americans comprised the greater part of the sample (45.5 percent) followed by Thais (29.6 percent) and others (25 percent).

Table 2 Nationality of Persons Responding to Survey

	Number of Firms	Percent of Firms	n
American	40	45.45%	88
Thai	26	29.55%	
Others	22	25.00%	

Multinational Affiliates and Subsidiaries

Sixty-one of the firms comprise subsidiaries or affiliates of multinational enterprises representing almost 70 percent of the survey respondents.

Industry Distribution

The most common business activities for survey respondents is manufacturing comprising 46.6 percent of the group followed by services (34.1 percent), wholesale trade (21.6 percent) and international trade (20.5 percent). The industry distribution, to a large extent, reflects the characteristics of the target group. Many of the firms are active in more than one type of business activity.

Table 3 Industry Distribution of Respondents

	Number of Firms	Percent of Firms	n
Manufacturing	41	46.59%	88
Services	30	34.09%	
Wholesale Trade (Domestic)	19	21.59%	
International Trade	18	20.45%	
Agriculture/Agribusiness	11	12.50%	
Consumer Products	10	11.36%	
Retail Trade (Domestic)	9	10.23%	
Construction and Related Services	5	5.68%	
Oil and Gas	3	3.41%	

Firm Size

Two figures were collected to provide an indication of firm size; number of employees and sales for 1989. All respondents provided employment figures which are detailed in the following table. Employment for the respondents ranged from 3 to 20,838 and averaged 1006 persons.

Table 4 Number of Employees

	Number of Firms	Percent of Firms	n
0-50 employees	22	25.00%	88
50-250 employees	25	28.41%	
250-500 employees	15	17.05%	
500-1000 employees	9	10.23%	
1000+ employees	17	19.32%	

Only sixty-six percent of the respondents provided sales figures which are detailed below. Sales ranged from 1.1 million baht to 42,081 million baht with an average of 3,041 million baht.

Table 5 1989 Revenues

	Number of Firms	Percent of Firms	n
0-100 million baht (0-4 million US\$)	9	13.64%	66
100-500 million baht (4-20 million US\$)	20	30.30%	
500-1000 million baht (20-40 million US\$)	10	15.15%	
1000-2500 million baht (40-100 million US\$)	15	22.73%	
2500+ million baht (100 + million US\$)	12	18.18%	

Market Orientation

A large majority of the respondents focus primarily on serving the domestic market. The average percentage of exports for the group total 22.4 with a range from 0 to 100 percent. The table below details the export patterns of the survey respondents.

Table 6 Percentage of Sales Exported

	Number of Firms	Percent of Firms	n
Export 0-19% of sales	56	70.00%	80
Export 20-39% of sales	6	7.50%	
Export 40-59% of sales	1	1.25%	
Export 60-79% of sales	4	5.00%	
Export 80-100% of sales	13	16.25%	

Future Outlook

The five year outlook for local business is quite bullish with more than half of the survey respondents anticipating average annual sales growth rates in excess of fifteen percent over the next five years. At a rate of 15 percent, firms will double their yearly revenues in five years. Slightly more than 80 percent of the respondents expect average growth in excess of 10 percent. Expected sales growth figures are summarized below. The sentiment reflected in this sample is quite consistent with findings in the American Chamber of Commerce Informal Business Survey which measures business confidence on a biannual basis.

Table 7 Expected Average Annual Sales Growth Rate over the Next Five Years

	Number of Firms	Percent of Firms	n
0-5% annually	3	3.66%	82
6-10% annually	13	15.85%	
11-15% annually	22	26.83%	
16-20% annually	14	17.07%	
21-30% annually	18	21.95%	
31-40% annually	6	7.32%	
41% or more annually	6	7.32%	

PROCUREMENT PATTERNS AND CRITERIA

The survey addressed a variety of issues relating to the procurement of capital equipment, manufacturing inputs (defined as raw and intermediate materials, components, sub-assemblies, and indirect materials), and services. Findings are detailed below.

Sources of Supply

The firms in the sample rely heavily on imported capital equipment and, to a lesser extent, imported manufacturing inputs to support their Thai operations. Not surprisingly, a great majority of services are procured from local firms or agencies. The survey findings in this regard are summarized in the table below. The fact that a higher percentage of manufacturing inputs are produced locally reflects the fact that some of the firms' activities focus on the use of local resources. The most common classification of local products procured by the sample group falls under packaging followed by raw materials, and chemicals and lubricants.

Table 8 Sourcing of Manufacturing Inputs, Capital Equipment, and Services

	Produced in Thailand*	Imported from USA*	Imported from Other Countries*	n
Manufacturing Inputs	41.53%	22.01%	36.64%	53
Capital Equipment	32.90%	27.89%	39.20%	79
Services	77.85%	12.00%	9.00%	82

* "Domestic Firms", "U.S. Firms", and "Firms from Other Countries" for the Services category.

It should be noted that the level of imports from the United States does not accurately portray the import patterns for the entire business population in Thailand. As the sample comprises a majority of American firms, there is a strong bias towards imports from the U.S.. Had the sample contained a more representative sample of the manufacturing community including more Japanese firms, we would see substantially lower figures for imports from the United States.

The following table details the classification of annual manufacturing inputs imported by firms in the sample group which total almost 60 billion baht (2.4 billion US\$). Raw materials comprise the greatest value of imported manufacturing inputs but this figure would be reduced in half if oil imports are excluded from the analysis. Semi-finished and finished goods also comprise a substantial portion of imported manufacturing inputs as several large operations primarily repackage imported goods for local market distribution. There are also significant imports of parts and components, particularly for firms in the electronics industry.

Table 9 Value of Imported Manufacturing Inputs

	Number of Firms	Percent of Firms	Value (mil.baht)	Ave per firm	n
Raw Materials	25	59.52%	26,278	1,051	42
Semi-finished/finished goods for final packaging	7	16.67%	13,322	1,903	
Metal Components	8	19.05%	6,301	788	
Electronic Components	10	23.81%	4,916	492	
Subassemblies	3	7.14%	3,716	1,239	
Components (other)	7	16.67%	3,206	458	
Chemicals/Lubricants	12	28.57%	1,003	84	
Packaging	7	16.67%	329	47	
Processed Materials	5	11.90%	222	44	
Plastic Components	4	9.52%	51	13	

The survey also queried firms about their capital expenditure plans for the next five years. A summary of the findings are presented in the following table. The survey results indicate that the aggregate planned spending for the sample firms as a group will exceed 15 billion baht on capital goods over the next five years (more than 600 million US\$). It should be pointed out that this aggregate figure is extremely conservative for it was calculated using the lower bounds of the expenditure ranges listed in the table.

Table 10 Planned Capital Equipment Expenditures for the Next Five Years

	Number of Firms	Percent of Firms	n
under 25 million baht (US\$ 1 million)	27	34.18%	79
25-125 million baht (1-5 US\$ million)	23	29.11%	
125-250 million baht (5-10 US\$ million)	8	10.13%	
250-500 million baht (10-20 US\$ million)	6	7.59%	
500-1,000 million baht (20-40 US\$ million)	5	6.33%	
over 1 billion baht (US\$ 40 million)	10	12.66%	

The biggest portion of planned expenditures falls under the classification of general production equipment followed by testing equipment, computers and related equipment, telecommunications gear and process control equipment. Firms also expect substantial expenditures on transportation equipment which falls under the heading of "other". Expenditures on office automation and transportation comprise a much larger portion of planned expenditures in the services sector as compared to the manufacturing sector. Table 11 details the capital expenditures by category for the sample group.

Table 11 Five-Year Planned Capital Expenditures by Category.

	Number of Firms	Estimated Value (million baht)	% of Expenditures	n
General Production Equipment	46	6,760	43.39%	78
Testing and QC Instruments	41	1,682	11.89%	
Office Automation/Computers	65	1,143	10.79%	
Telecommunications	48	1,474	9.46%	
Process Control	37	1,312	8.42%	
Other	21	1,853	7.34%	
Environmental Protection	31	768	4.93%	
Energy Conservation	21	589	3.78%	
Total		15,581		

Decision-making for Local Subsidiaries of Multinational Corporations

Local subsidiaries of foreign multinationals were asked to rate the level of control the parent exercises in local purchase decisions in order to provide some indication of whether marketing efforts should be geared towards the local subsidiaries or the parent firms. Companies rated control by the parent according to the following criteria:

- | | |
|------------------|--|
| Total Control | All critical inputs are procured directly from the parent or from vendors which have been selected by the home office. |
| Strong Control | Most critical inputs are procured directly from the parent or vendors which have been selected by the home office. The Thai operation does have some leeway in choosing suppliers but all vendors must be approved by the home office. |
| Moderate Control | The Thai operation chooses suppliers but vendors of key parts, equipment and services must be approved by the home office. |
| Low Control | The Thai operation is responsible for selecting vendors as long as the final product meets home office specifications. |
| No Control | The Thai operation is fully responsible for procurement of inputs for local production. |

Generally, local subsidiaries are subject to low or moderate control from the parent for manufacturing inputs, capital goods, and services although most firms require home office approval for the first two categories of goods. Parent firms exert the most control over the purchase of capital goods and the least control regarding services.

Interviews revealed that several firms buy goods directly from the parent. This is most common in the area of capital equipment when multinationals transfer manufacturing lines from other countries. In other cases, the parent manufactures its own highly specialized equipment and therefore subsidiaries have little say in the purchase decision.

Table 12 Control Exerted by Parent in Manufacturing Input Purchase Decisions.

	Manufacturing Inputs		Capital Goods		Services	
	Number of Firms	Percent of Firms	Number of Firms	Percent of Firms	Number of Firms	Percent of Firms
Total Control (rating=5)	1	2.27%	1	1.79%	0	0.00%
Strong Control (rating=4)	4	9.09%	10	17.86%	5	8.77%
Moderate Control (rating=3)	15	34.09%	21	37.50%	18	31.58%
Low Control (rating=2)	16	36.36%	17	30.36%	23	40.35%
No Control (rating=1)	8	18.18%	7	12.50%	11	19.30%
Average Rating	2.41		2.66		2.30	
n	44		56		57	

Opportunities for New Suppliers

Survey participants were asked to estimate the percentage of planned purchases for the next five years for which the vendor or equipment had already been selected (defined as being very difficult to displace for a new supplier). The results which are summarized below indicated that substantial opportunities exist for new vendors; particularly suppliers of capital equipment.

Table 13 Percentage of Planned Purchases over the Next Five Years for which the Vendor has Already been Selected

	Percent	n
Manufacturing Inputs	41.53%	53
Capital Equipment	32.90%	79
Services	41.04%	76

Purchase Criteria

The three tables below summarize the survey findings regarding purchase criteria for manufacturing inputs, capital equipment, and services. Respondents were asked to evaluate a variety of criteria with each evaluation assigned a rating (Very Important = 3, Somewhat Important = 2, and Not Important = 1). It should be noted that while the criteria are listed in order of their ranking, some of differences are so small that they are statistically insignificant.

Quality ranked as the most important factor in the purchase decision for both manufacturing inputs and capital equipment. Technical factors, service, and price also were rated as quite important. Not surprisingly, delivery is more important in regard to manufacturing inputs as compared with capital equipment purchases.

While a local presence was ranked relatively low by survey respondents, interviews revealed that many managers believe that firms with a local presence are in a much better position to provide the level of timeliness and service that customers demand. The importance of a local presence is not limited to suppliers of manufacturing materials and services. Several interviewees felt that capital equipment manufacturers need to demonstrate a commitment to serving the Thai market by establishing local service organizations.

Table 14 Purchase Criteria for Manufacturing Inputs

	Very Important	Somewhat Important	Not Important	Rating	n
Quality level	51	4	0	2.93	55
Consistency of quality	49	5	0	2.91	54
Delivery	38	14	2	2.67	54
Technical specifications	33	19	2	2.57	54
Service/support	32	20	3	2.53	55
Price	27	26	1	2.48	54
Compatibility with existing equipment/processes	27	20	7	2.37	54
Local Presence	6	38	10	1.93	54

Table 15 Purchase Criteria for Capital Equipment

	Very Important	Somewhat Important	Not Important	Rating	n
Quality and Reliability	73	4	2	2.90	79
Service/support	55	21	2	2.68	78
Compatibility with existing equipment/processes	51	27	1	2.63	79
Technical specifications	51	22	5	2.59	78
Speed/Performance	40	34	4	2.46	78
Price	38	38	3	2.44	79
Delivery	30	45	4	2.33	79

Table 16 Purchase Criteria for Services

	Very Important	Somewhat Important	Not Important	Rating	n
Responsiveness to your firm's needs	74	6	4	2.83	84
Level of Technical Expertise	68	13	4	2.75	85
Service/support	65	16	5	2.70	86
Delivery time	51	27	5	2.55	83
Local Presence	37	40	7	2.36	84
Ability to work in Thai cultural environment	41	29	12	2.35	82
Price	33	48	4	2.34	85

Constraints to Purchasing Locally Produced Goods and Services

When asked about the primary constraints affecting the ability of firms to procure locally produced goods and services respondents were relatively consistent in their responses. The most important constraint affecting their ability to do so is the total lack of desired products or services or the unavailability of quality products and services. While constituting a less important factor, the majority of survey respondents felt that local vendors provide inadequate levels of support and service. Responses were consistent across product classifications and are detailed below.

Table 17 Constraints Affecting Ability to Procure Manufacturing Inputs Produced in Thailand

	Very Important	Somewhat Important	Not Important	Rating	n
Unavailability of products	43	4	4	2.76	51
Unavailability of quality products	36	10	3	2.67	49
Poor service/support by local vendors	12	23	12	2.00	47
High cost of local products	6	25	17	1.77	48
Directives from parent company	6	15	23	1.61	44
Economies-of-scale for multinational corporation	2	22	20	1.59	44

Table 18 Constraints Affecting Ability to Procure Equipment Produced in Thailand

	Very Important	Somewhat Important	Not Important	Rating	n
Unavailability of products	55	15	7	2.62	77
Unavailability of quality products	45	20	10	2.47	75
Poor service/support by local vendors	21	30	23	1.97	74
High cost of local products	14	30	29	1.79	73
Economies-of-scale for multinational corporations	5	20	38	1.48	63
Directives from parent company	1	19	42	1.34	62

Table 19 Constraints Affecting Ability to Procure Local Services

	Very Important	Somewhat Important	Not Important	Rating	n
Lack of quality services	38	18	11	2.40	67
Lack of services	26	25	12	2.22	63
Poor Responsiveness of local service firms	20	27	17	2.05	64
Economies-of-scale for multinational corporation	7	20	22	1.69	49
High cost of local services	7	25	32	1.61	64
Directives from parent company	6	16	29	1.55	51

Constraints to Purchasing Products from the United States

Survey participants were asked to assess factors which served to limit imports from the United States or from American firms. Two factors were most important, costs and service. The cost aspect actually comprises two elements, product costs and import tariffs. Interviews revealed that import tariffs were only important when comparing U.S. products with locally produced goods since goods from all countries are subject to the same tariff rates. One other factor affecting price was the lack of adequate financing. Most of those interviewed felt that American firms were sometimes at a disadvantage as the U.S. government does not provide the same level of export financing accorded competitors from other countries.

Table 20 Constraints to Purchasing Manufacturing Inputs from the USA

	Very Important	Somewhat Important	Not Important	Rating	n
Product cost	28	15	7	2.42	50
Import tariffs	28	9	12	2.33	49
Level of service/support	14	18	15	1.98	47
Unaware of potential suppliers	11	20	16	1.89	47
Product specifications	16	8	22	1.87	46
Incompatibility with existing equipment/processes	11	16	20	1.81	47
Quality	12	9	21	1.79	42
Too sophisticated/high-end for Thai market	5	15	25	1.56	45
Level technology	5	12	29	1.48	46
Directives from home office	3	10	29	1.38	42

Several interviewees expressed disappointment that they were unable to buy U.S. goods as the survey group comprised many Americans or Thais who have been educated in the States and have a strong affinity for Americans. Comments regarding American goods, however, were surprisingly consistent. Besides criticizing the high cost of U.S. goods, businesspersons cited

poor service as a major factor limiting their purchase from America. Common complaints centered around the fact that American firms do not have an international focus. Several individuals discussed past experiences where U.S. firms have refused to respond to overseas inquiries, caused inordinate problems with Customs because of poor shipping documentation and generally were not interested in developing a strong presence in Thailand (only wanting the quick sale without providing necessary support). Survey details regarding constraints to purchasing U.S. goods and services are summarized in tables 20 through 22.

Table 21 Constraints to Purchasing Capital Goods from the USA

	Very Important	Somewhat Important	Not Important	Rating	n
Product cost	35	19	17	2.25	71
Level of service/support	29	22	19	2.14	70
Import tariffs	28	18	23	2.07	69
Incompatibility with existing equipment/	14	32	22	1.88	68
Equipment specifications	17	19	32	1.78	68
Unaware of potential suppliers	14	18	37	1.67	69
Too sophisticated/high-end for Thai market	10	17	40	1.55	67
Level technology	8	18	41	1.51	67
Inferior Quality	5	14	47	1.36	66
Directives from home office	2	11	41	1.28	54

Table 22 Constraints to Purchasing Services from the American Firms

	Very Important	Somewhat Important	Not Important	Rating	n
Not available locally	37	21	17	2.27	75
Level of service/support	36	20	17	2.26	73
Product costs	29	26	20	2.12	75
Incompatibility with existing systems	21	17	34	1.82	72
Quality	19	17	35	1.77	71
Unaware of potential suppliers	10	26	36	1.64	72
Level technology	12	16	43	1.56	71
Directives from home office	5	16	41	1.42	62
Too sophisticated/high-end for Thai market	7	15	48	1.41	70

TRADE AND INVESTMENT OPPORTUNITIES

Survey participants were asked to assess the profitability of trade and investment opportunities in Thailand. The business community's confidence in the the economy is quite strong with an overwhelming perception that all sectors of the economy offer profitable opportunities. Interestingly enough, both manufacturers and non-manufacturers had very similar perceptions of the business climate.

Investment Opportunities

The local business community feels that investment opportunities are uniformly strong in most sectors of the economy. Ratings on investment opportunities are presented below in Table 23. Opportunities in the telecommunications sector topped the list for investment opportunities. One comment which was consistently mentioned in regard to this sector, however, was that while there are substantial profit opportunities, only a few firms will become players in this industry, many of whom have already formed alliances to provide equipment and services for the next several years.

Table 23 Ranking of Investment Opportunities in Thailand

	Highly Profitable	Somewhat Profitable	Not Profitable	Rating	n
Telecommunications	52	24	4	2.60	80
Manufacturing	40	42	2	2.45	84
Tourism/Restaurants/Hotels	42	34	6	2.44	82
Construction and Related Services	37	40	4	2.41	81
Banking/Financial Services	35	45	2	2.40	82
Commerce (International)	33	45	2	2.39	80
Retail/Wholesale Trade	31	49	3	2.34	83
Oil and Minerals	31	46	4	2.33	81
Agriculture/Agribusiness	25	50	7	2.22	82
Transport	14	58	9	2.06	81

The manufacturing sector also offers bright prospects although there is no clear consensus as the to most profitable types of manufacturing investments. Many interviewees felt that the best opportunities lie in labor intensive assembly operations claiming that Thailand still does not have an adequate human resource infrastructure to support the more high-tech operations. On the other hand, several businesspersons have argued that low levels of local competition in support industries (material, parts, and components suppliers), high import tariffs, and local content requirements for the automotive industry have created substantial opportunities for backwards linkages to the large manufacturing/assembly base already in-place.

The construction sector is also highly regarded, particularly with the large infrastructure projects planned over the next decade. Assessments in the agricultural sector were relatively less optimistic, but with important qualifications. The community general feels that investment in agricultural commodities, which are subject to large price swing does not offer profit opportunities. On the other hand, value-added agribusiness offer substantial opportunities to capitalize on Thailand's strong agricultural base. The agribusiness sector will be described in greater detail below.

Respondents were also asked to rank the perceived profitability of manufacturing subsectors which are outlined in Table 24. Once again, the business community is quite bullish on all segments of the economy with almost all respondents ranking all sectors as profitable.

Table 24 Ranking of Investment Opportunities for Manufacturing Subsectors

	Highly Profitable	Somewhat Profitable	Not Profitable	Rating	n
Electronics	55	24	2	2.65	81
Chemicals/Petrochemicals	44	38	0	2.54	82
Consumer Products	34	45	2	2.40	81
Plastics	29	51	1	2.35	81
Machinery and Tools	26	46	9	2.21	81
Textile/Garments	25	48	8	2.21	81
Automotive	28	39	14	2.17	81
Rubber Products	13	59	9	2.05	81

Participants were also asked to rank manufacturing investment opportunities by market orientation. More specifically they were asked for what markets do they believe the best market opportunities exist. Many of the businesspersons interviewed felt that opportunities existed both for the domestic and export markets but a pattern did emerge. Generally, projects involving support industries were best suited for the domestic or regional markets. On the other hand, labor intensive operations were perceived as having better opportunities in world markets. There was sentiment that there are substantial indirect export opportunities to supply local electronics assemblers.

Table 25 Best Investment Opportunities by Market Orientation

	Domestic Market	Regional Markets	Worldwide Markets	n
Automotive	41	26	13	80
Chemicals/Petrochemicals	38	27	16	81
Consumer Products	32	25	23	80
Plastics	29	33	18	80
Machinery and Tools	27	34	18	79
Rubber Products	12	21	47	80
Electronics	11	18	51	80
Textile/Garments	7	5	68	80

Respondents in the agricultural sector were administered a supplemental questionnaire to help uncover specific investment opportunities in a sector which has a long history of USAID participation. Businesspersons who are active in agribusiness believe there are numerous opportunities for American investors in the Thai agribusiness sector as the U.S. is a recognized leader in agriculture and food processing technologies. Personal Interviews indicated some of the best opportunities lie in high value-added processing and technologies to improve agricultural quality and productivity (i.e. disease control, breeding, etc.).

Table 26 Investment Opportunities in Selected Agricultural Activities

	Highly Profitable	Somewhat Profitable	Not Profitable	Rating	n
Fruits and Nuts	6	2	0	2.75	8
Livestock	4	4	0	2.50	8
Seed production	4	5	0	2.44	9
Spices	3	4	0	2.43	7
Vegetables	3	5	0	2.38	8
Horticulture	3	5	0	2.38	8
Coffee	2	5	0	2.29	7
Cotton	2	5	1	2.13	8
Feed grains	1	5	1	2.00	7
Rubber	0	5	2	1.71	7
Palm oil	0	5	2	1.71	7
Tobacco	1	3	3	1.71	7
Sugarcane	0	4	2	1.67	6
Cassava	0	3	3	1.50	6
Rice	0	2	5	1.29	7

Table 27 Investment Opportunities in Selected Agricultural Processing Activities

	Highly Profitable	Somewhat Profitable	Not Profitable	Rating	n
Fish Processing	6	2	0	2.75	8
Processing food products (fruits, vegetables, etc.)	6	3	0	2.67	9
Feedgrain processing	6	3	0	2.67	9
Nut Processing	6	3	0	2.67	9
Dairy	6	3	0	2.67	9
Wood Processing	5	4	0	2.56	9
Meat Processing	4	5	0	2.44	9
Coffee Processing	3	6	0	2.33	9
Paper and Pulp Products	4	4	1	2.33	9
Spice Processing	3	6	0	2.33	9
Ginning/Weaving	1	8	0	2.11	9
Rubber Products	0	8	1	1.89	9
Sugar Processing	0	7	2	1.78	9
Palm Oil Processing	0	6	3	1.67	9
Tobacco Processing	0	6	3	1.67	9
Cassava pellets	0	5	4	1.56	9

Trade

The local business community is also quite bullish on bilateral trade prospects. With the exception of the agribusiness sector, more than half of all survey respondents felt export opportunities for U.S. products to Thailand were good or better. Very high ratings were given to the telecommunications, medical equipment, and environmental control sectors. Once again, there was a consensus that only a few American suppliers would reap any benefits in the telecommunications sector. With regard to the agribusiness sector, while many felt that there may be opportunities in the area of equipment and some product classifications (i.e. apples, tobacco), they were concerned that Thailand's trade policies would continue to severely curtail American access to the local market. Table 28 summarizes the assessment of prospects for U.S. exports to Thailand.

Table 28 Ranking of Export Opportunities for U.S. Products to Thailand

	Very Good	Good	Not Good	Rating	n
Telecommunications	55	23	4	2.62	82
Medical and Related Equipment	51	29	2	2.60	82
Environmental Control	46	28	7	2.48	81
Manufacturing	28	47	6	2.27	81
Services	26	43	8	2.23	77
Oil and Minerals	26	45	9	2.21	80
Tourism/Restaurants/Hotels	13	45	21	1.90	79
Construction and Related Services	14	40	27	1.84	81
Transport	9	47	24	1.81	80
Agribusiness/Food Products	11	27	44	1.60	82

Perceived prospects for Thai exports to the United States were even better and presented in Table 27. The Gems and Jewelry sector topped the list with all respondents believing export opportunities were good or very good. In general, products for which Thailand is a proven producer were rated the best opportunities. Products which Thailand has limited experience producing, particularly automotive parts and machinery and tools were given lower ratings. Several of those interviewed stated that they were very concerned that rising protectionism in the U.S. and the fact that the two countries have a list of trade disputes which have yet to be settled will eventually undermine Thai efforts to export products to the United States.

Table 29 Export Opportunities for Thai Products to the United States

	Very Good	Good	Not Good	Rating	n
Gems and Jewelry	65	17	0	2.79	82
Leather and Footwear Products	50	31	1	2.60	82
Agribusiness/Food Products	46	32	5	2.49	83
Textile and Garments	41	38	3	2.46	82
Plastic and Rubber Products	34	38	9	2.31	81
Wood Products	32	36	14	2.22	82
Electronics	27	41	11	2.20	79
Automotive Parts and Accessories	16	37	27	1.86	80
Machinery, Tools & Equipment	8	41	32	1.70	81

Interest in Bilateral Commercial Activities

A large majority of the survey group (66 percent) expressed interest in developing new or additional commercial ties with U.S. companies. More than half of those firms that are interested in increased bilateral ties are interested in accessing U.S. technology. Interviews revealed interest in a variety of U.S. technologies ranging from research and development to financial services. Local firms are also very interested in accessing markets developed by U.S. firms and obtaining equipment and materials from American suppliers. On the other hand, local firms offer access to markets (both domestic and export) and have managerial expertise regarding the local market. The table below summarizes the types of resources local firms are seeking from and those they have to offer U.S. companies.

Table 30 Resources Local Firms Would Like to Access and Offer U.S. Companies

	Access from U.S. Firms		Offer U.S. Firms		n
	Number of Firms	Percent of Firms	Number of Firms	Percent of Firms	
Technology	33	61.11%	6	11.11%	54
Access to Markets	25	46.30%	38	70.37%	
Equipment/Materials	22	40.74%	6	11.11%	
Capital	14	25.93%	12	22.22%	
Managerial Expertise/Local Knowledge	10	18.52%	38	70.37%	

Agribusiness firms were asked about their interest in selected agribusiness technologies from the United States. The table below summarizes the results indicating strong interest in a variety of technologies and equipments.

Table 31 Interest in U.S. Agribusiness Technologies

	Very Interested	Somewhat Interested	Not Interested	Rating	n
Packaging Technology	5	2	1	2.50	8
Plant/Livestock Biotechnology and Breeding Technology	4	3	1	2.38	8
Machinery and Agricultural Inputs	4	3	1	2.38	8
Aquaculture Technology	3	3	1	2.29	7
Food Processing Technology	4	2	2	2.25	8
Seed Multiplication Expertise	3	4	1	2.25	8
Post Harvest Storage and Handling Technologies	3	4	1	2.25	8
Plant/Livestock Protection and Disease Control	2	4	2	2.00	8

Business collaboration can take a variety of formats as outlined in Table 32 below. Approximately two-thirds of the respondents stated they would like to find new or additional American customers. An equal number said they were interested in finding U.S. suppliers. There is also very strong interest in joint ventures, consulting/technical services, and licensing arrangements. A significant number of firms also indicated an interest in production arrangements, franchises, and management arrangements.

Table 32 Interest in Business Collaboration by Form

	Very Interested	Somewhat Interested	Not Interested	Rating	n
Supplier (US firm as customer)	28	8	17	2.21	53
Joint Venture	18	18	18	2.00	54
Consulting/Technical Services	18	19	19	1.98	56
Customer (US firm as supplier)	17	19	18	1.98	54
Licensing or Technology Transfer Agreement	15	19	20	1.91	54
Production Arrangement or Contract Manufacturing	14	7	32	1.66	53
Franchise	8	10	33	1.51	51
Management Agreement	8	10	35	1.49	53

Three industrial sectors, in particular, have indicated a strong interest in attracting U.S. firms to invest in Thailand in order to support local operations. The electronics industry, with encouragement from the Board of Investment, has been trying to attract parts and components manufacturers to support local assembly operations. Japanese firms have been the largest group to fill this need to date. Also, manufactures of personal and household care items have also indicated a strong interest in securing a local supply source for raw materials as current imports are subject to high import duties. Finally, the automotive assembly industry is trying to encourage investment as it struggles to meet local content requirements imposed by the government.

Local Firms and JUST Business

Survey respondents were asked their opinion regarding activities which were previously proposed for the JUST business organization. As the table below illustrates, there is fairly strong support for all of the proposed activities for JUST Business with more than 65 percent of all firms indicating an interest for all proposed activities. The most common comments in follow-up interviews regarding JUST Business was concern that the organization not duplicate the efforts of other agencies including the US & FCS, the Board of Investment, the Department of Export Promotion, OPIC, the Ex-Im Bank, etc.. American businessmen indicated that the U.S. firms wishing to invest abroad do not receive the same level of support from their government as do companies from other countries, particularly Japan and JUST Business could be of assistance. Also, through policy studies, it was felt that the local private sector may be able to take a more active and positive role helping defuse tension arising from trade disputes.

Table 33 Activity Preference for JUST Business

	Very Interested	Somewhat Interested	Not Interested	Rating	n
Trade and Investment Information Services	43	25	12	2.39	80
General Trade Promotion Services	38	30	12	2.33	80
Trade Matchmaking Services	37	18	24	2.16	79
Trade and Investment Policy Analysis	31	27	21	2.13	79
General Investment Promotion Services	26	36	17	2.11	79
Investment Matchmaking Services	25	27	27	1.97	79

The local business community is well aware of the role USAID has played in Thailand's economic and social development. There is strong sentiment that USAID should continue with social programs although new initiatives should be adjusted in accordance with the increasingly industrialized economy. In fact, since many of the firms in the sample serve the local market, they have a vested interest in seeing that economic growth is broad-based, reaching into all sectors of the economy. When queried over whether or not JUST Business should have a social agenda, all firms felt there was a social role for JUST Business. While many interviewees believe that a bilateral trade and investment promotion program would naturally create social benefits, there is a consensus that JUST Business should contain components which aid in the social and economic development of Thailand. While the focus of the programs should be broadly promoting U.S.-Thai commercial activities Table 34 below indicates the strong support for social components to the JUST organization.

Table 34 Social Agenda for JUST Business

	Strongly Agree	Agree	Disagree	Rating	n
Encourage technology transfer and manpower training	56	23	3	2.65	82
Encourage development of business opportunities for small- and medium-sized firms (both U.S. and Thai).	57	20	5	2.63	82
Encourage business development outside of Metropolitan Bangkok	54	24	4	2.61	82
Encourage development of employment opportunities for the rural poor	45	23	14	2.38	82
Encourage business development in the agricultural sector	41	30	11	2.37	82

APPENDICES

SURVEY INSTRUMENT

JUST BUSINESS

TRADE AND INVESTMENT MARKET SURVEY

PLEASE READ

OBJECTIVE

This survey will be used in the development of a business plan for JUST Business, a non-profit organization to be run by leaders from both the Thai and U.S. business sectors. The purpose of the proposed organization will be the promotion of bilateral U.S.-Thai trade and investment.

CONTENT

Questions concern the nature of your organization, purchasing patterns and criteria, and perceptions regarding trade and investment opportunities in Thailand. The survey is divided into five brief sections

- | | |
|--------------------------|---------------------------|
| I. Company Background | IV. Services |
| II. Manufacturing Inputs | V. Business Opportunities |
| III. Capital Goods | |

METHOD

1. A member of the research team from Siamerica Business Group will contact you to set up a short interview to review the questionnaire.
2. Please prepare the questionnaire beforehand and have a completed copy ready for the interviewer (you may want to check with your purchasing, production, or accounting departments regarding some of the questions in Sections II through IV).
3. Any uncertainties regarding the questionnaire can be cleared up during the interview or by contacting Rick Smith of Siamerica Business Group at 251-9832 or 252-0177.

YOUR CONTRIBUTION IS IMPORTANT

We hope you will kindly set aside 30 minutes and contribute to this project. As your firm is one of the leading companies in Thailand, we view your participation as critical towards the development of a sound and meaningful business strategy for JUST Business. With your help, we expect to identify promising business opportunities in Thailand and develop a unique information base to support trade and investment promotion efforts.

Aggregated survey results will be made available to the all survey participants. You can be assured that individual responses will be kept in strict confidence.

Thank you in advance for your support of JUST Business.

BACKGROUND INFORMATION

1. Company Name: _____

2. Managing Director: _____ Nationality _____

3. Person Interviewed: _____ Nationality _____

Position: Owner Manager
 Managing Director Other _____

4. In which activity(ies) is your firm involved? (can check more than one)

- | | |
|---|--|
| <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Agriculture/Agribusiness |
| <input type="checkbox"/> International Trade | <input type="checkbox"/> Construction and Related Services |
| <input type="checkbox"/> Wholesale Trade (Domestic) | <input type="checkbox"/> Consumer Products |
| <input type="checkbox"/> Retail Trade (Domestic) | <input type="checkbox"/> Services |

What are the primary products/services your firm produces/provides? _____

5. Company ownership?

<u>Nationality</u>	<u>Percentage Shareholding</u>
_____	_____ %
_____	_____ %
_____	_____ %
_____	_____ %

6. Is your firm a subsidiary or an affiliate of a foreign multinational?

Yes No

7. Total Number of Employees _____

8. Sales for 1989? _____ baht

9. Percentage of sales exported? _____ %

Primary Export Markets (percentage of total exports):

USA	_____ %	Japan	_____ %
Europe	_____ %	ASEAN	_____ %
Asia	_____ %	Other	_____ %
(except Japan and ASEAN)			

10. What do you expect your firm's annual sales growth rate to average over the next 5 years?

- | | |
|---|--|
| <input type="checkbox"/> 0-5% annually | <input type="checkbox"/> 6-10% annually |
| <input type="checkbox"/> 11-15% annually | <input type="checkbox"/> 16-20% annually |
| <input type="checkbox"/> 21-30% annually | <input type="checkbox"/> 31-40% annually |
| <input type="checkbox"/> 41% or more annually | <input type="checkbox"/> Other _____ |

If your firm is not involved in manufacturing, go to next section on Capital Equipment.

Manufacturing Inputs

11. Please indicate the source (by percentage) of your total manufacturing inputs (defined as raw and intermediate materials, components, sub-assemblies, and indirect materials) for the following categories.

**Domestically
Produced**

_____ %

**Imported
from USA**

_____ %

**Imported
from Other Countries**

_____ %

12. Please indicate the approximate value of imported manufacturing inputs for the latest complete fiscal year under the following categories provided the category represents at least 10% of imported manufacturing inputs (in millions of baht).

<p>_____ Raw Materials</p> <p>_____ Metal Components</p> <p>_____ Plastic Components</p> <p>_____ Electronic Components</p> <p>_____ Components (other)</p> <p>_____ Other _____</p>	<p>_____ Processed Materials</p> <p>_____ Subassemblies</p> <p>_____ Chemicals/Lubricants</p> <p>_____ Packaging</p> <p>_____ Semi-finished/finished goods for final packaging.</p>
--	---

13. Please check the categories for which your firm procures locally produced manufacturing inputs.

<p><input type="checkbox"/> Raw Materials</p> <p><input type="checkbox"/> Metal Components</p> <p><input type="checkbox"/> Plastic Components</p> <p><input type="checkbox"/> Electronic Components</p> <p><input type="checkbox"/> Components (other)</p> <p><input type="checkbox"/> Other _____</p>	<p><input type="checkbox"/> Processed Materials</p> <p><input type="checkbox"/> Subassemblies</p> <p><input type="checkbox"/> Chemicals/Lubricants</p> <p><input type="checkbox"/> Packaging</p> <p><input type="checkbox"/> Semi-finished/finished goods for final packaging.</p>
--	--

14. Please rank the following criteria affecting your firm's purchase decision for manufacturing inputs.

	Very Important	Somewhat Important	Not Important
Quality level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compatibility with existing equipment/processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consistency of quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local Presence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service/support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical specifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If your firm is not a subsidiary or affiliate of a foreign multinational please skip the following question and go directly to question #16.

15. How much control does the parent firm exercise over manufacturing input purchase decisions for the Thai operation?

- Total Control (All critical inputs are procured directly from the parent or from vendors which have been selected by the home office)
- Strong Control (Most critical inputs are procured directly from the parent or vendors which have been selected by the home office. The Thai operation does have some leeway in choosing suppliers but all vendors must be approved by the home office)
- Moderate Control (The Thai operation chooses suppliers but vendors of key parts/materials must be approved by the home office)
- Low Control (The Thai operation is responsible for selecting vendors as long as the final product meets home office specifications).
- No Control (The Thai operation is fully responsible for procurement of manufacturing inputs for local production)

16. What are the primary constraints affecting your firm's ability to procure manufacturing inputs which are produced in Thailand?

	Very Important	Somewhat Important	Not Important
Unavailability of products	[]	[]	[]
Unavailability of quality products	[]	[]	[]
High cost of local products	[]	[]	[]
Poor service/support by local vendors	[]	[]	[]
Directives from parent company	[]	[]	[]
Economies-of-scale for multinational corporation dictate that Thai subsidiary procure inputs from vendors who supply firm worldwide.	[]	[]	[]
Other _____	[]	[]	[]

17. What are the primary factors which limit the amount of manufacturing inputs your firm purchases from the U.S.A.?

	Very Important	Somewhat Important	Not Important
Level technology	[]	[]	[]
Unaware of potential suppliers	[]	[]	[]
Product cost	[]	[]	[]
Import tariffs	[]	[]	[]
Level of service/support	[]	[]	[]
Incompatibility with existing equipment/processes	[]	[]	[]
Too sophisticated/high-end for Thai market	[]	[]	[]
Directives from home office	[]	[]	[]
Product specifications	[]	[]	[]
Quality	[]	[]	[]
Other _____	[]	[]	[]

18. Of your planned materials purchases over the next five years, for what percentage has the vendor already been selected (i.e. would be very difficult to displace for a new supplier)?

_____ %

CAPITAL EQUIPMENT

19. Please indicate the source (by percentage of total capital equipment expenditures) for your firms existing capital equipment.

Domestically Produced

Imported from USA

Imported from Other Countries

_____ %

_____ %

_____ %

20. Please check the categories for which your firm procures locally produced capital equipment.

- | | |
|---|--|
| <input type="checkbox"/> General Production Equipment | <input type="checkbox"/> Office Automation/Computers |
| <input type="checkbox"/> Process Control | <input type="checkbox"/> Testing and QC Instruments |
| <input type="checkbox"/> Energy Conservation | <input type="checkbox"/> Telecommunications |
| <input type="checkbox"/> Environmental Protection | <input type="checkbox"/> Other _____ |

21. Please rank the following criteria affecting your firm's purchase decision for capital equipment.

	Very Important	Somewhat Important	Not Important
Quality and Reliability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compatibility with existing equipment/processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical specifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speed/Performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service/support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22. What are the primary constraints affecting your firm's ability to procure equipment which has been produced in Thailand?

	Very Important	Somewhat Important	Not Important	N/A
Unavailability of products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unavailability of quality products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High cost of local products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor service/support by local vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directives from parent company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Economies-of-scale for multinational corporation dictate that Thai subsidiary procure equipment from vendors who supply firm worldwide.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If your firm is **not** a subsidiary or affiliate of a foreign multinational, please skip the following question and go directly to question #24.

23. How much control does the parent firm exercise over capital equipment purchase decisions for the Thai operation?

- Total Control (All key equipments are procured directly from the parent or from vendors which have been selected by the home office)
- Strong Control (Most key equipments are procured directly from the parent or vendors which have been selected by the home office. The Thai operation does have some leeway in choosing equipment but all capital purchases must be approved by the home office)
- Moderate Control (The Thai operation chooses capital equipment but purchases of key equipment must be approved by the home office)
- Low Control (The Thai operation is responsible for selecting equipment as long as the final product meets home office specifications).
- No Control (The Thai operation is fully responsible for procurement of equipment for local production)

24. Approximately how much does your firm expect to spend on capital equipment over the next five years?

- under 25 million baht (US\$ 1 million) 250-500 million baht (10-20 US\$ million)
- 25-125 million baht (1-5 US\$ million) 500-1,000 million baht (20-40 US\$ million)
- 125-250 million baht (5-10 US\$ million) over 1 billion baht (US\$ 40 million)

25. Of the total planned capital equipment expenditures for the next five years, approximately what percentage falls under the following categories?

_____ % General Production Equipment	_____ % Office Automation/Computers
_____ % Process Control	_____ % Testing and QC Instruments
_____ % Energy Conservation	_____ % Telecommunications
_____ % Environmental Protection	_____ % Other _____

26. What are the primary factors which limit the amount of equipment your firm purchases from the U.S.A.?

	Very Important	Somewhat Important	Not Important	N/A
Level technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unaware of potential suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Import tariffs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of service/support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incompatibility with existing equipment/ processes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too sophisticated/high-end for Thai market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directives from home office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equipment specifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inferior Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

27. Of your planned capital equipment purchases over the next five years, for what percentage has the vendor/equipment already been selected (i.e. would be very difficult to displace for a new supplier)?

_____ %

SERVICES

28. Please indicate the source (by percentage) of your service expenditures for the following categories.

Domestic Firms	US Firms	Firms from Other Countries
_____ %	_____ %	_____ %

29. Where do you procure the following services? (Note: offshore refers to firms which have no operations in Thailand. Therefore, a local subsidiary of an overseas bank is not considered "offshore".)

	Local	Offshore	Not Applicable
Accounting	[]	[]	[]
Advertising	[]	[]	[]
Technical Consulting	[]	[]	[]
Product/Process Licenses/Rights	[]	[]	[]
Legal Services	[]	[]	[]
Manpower Training	[]	[]	[]
Management/Business Consulting	[]	[]	[]
Computer Information Systems and Software	[]	[]	[]
Banking/Financial	[]	[]	[]
Insurance	[]	[]	[]
Other _____	[]	[]	[]

30. Please rank the following criteria affecting your firm's purchase decision for services.

	Not Important	Somewhat Important	Very Important
Level of Technical Expertise	[]	[]	[]
Ability to work in Thai cultural environment	[]	[]	[]
Responsiveness to your firm's needs	[]	[]	[]
Local Presence	[]	[]	[]
Delivery time	[]	[]	[]
Price	[]	[]	[]
Service/support	[]	[]	[]
Other _____	[]	[]	[]

If your firm is not a subsidiary or affiliate of a foreign multinational, skip the following question and go directly to question #32.

31. How much control does the parent firm exercise over procurement of services for the Thai operation?
- Total Control (All key services are procured directly from the parent or from vendors which have been selected by the home office)
- Strong Control (Most key services are procured directly from the parent or vendors which have been selected by the home office. The Thai operation does have some leeway in choosing some service organizations but all selections must be approved by the home office)
- Moderate Control (The Thai operation chooses service organizations but procurement of such services must be approved by the home office)
- Low Control (The Thai operation is responsible for selecting service organizations as long as the services meet home office specifications).
- No Control (The Thai operation is fully responsible for procurement of services for local operations)
32. What are the primary constraints affecting your firm's ability to procure more services from firms located in Thailand?

	Not Important	Somewhat Important	Very Important	N/A
Lack of services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of quality services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High cost of local services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor Responsiveness of local service firms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directives from parent company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Economies-of-scale for multinational corporation dictate that Thai subsidiary procure services from agencies which service your firm worldwide.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

33. What are the primary factors which limit the amount of services your firm purchases from the U.S.A. or from American firms?

	Not Important	Somewhat Important	Very Important	N/A
Level technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unaware of potential suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of service/support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incompatibility with existing systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Too sophisticated/high-end for Thai market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directives from home office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not available locally	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

34. Of your planned consumption of services over the next five years, for what percentage have the service agencies already been selected (i.e. would be very difficult to displace for a new agency)?

_____ %

BUSINESS OPPORTUNITIES

The purpose of this section is to survey the local business community about perceptions regarding general opportunities. Many of the questions may not relate directly to your business or area of expertise. Nonetheless, please respond to all questions to the best of your ability.

35. How would you rate investment opportunities in Thailand for the following sectors?

	Highly Profitable	Somewhat Profitable	Not Profitable
Agriculture/Agribusiness	[]	[]	[]
Construction and Related Services	[]	[]	[]
Commerce (International)	[]	[]	[]
Retail/Wholesale Trade	[]	[]	[]
Banking/Financial Services	[]	[]	[]
Manufacturing	[]	[]	[]
Tourism/Restaurants/Hotels	[]	[]	[]
Transport	[]	[]	[]
Oil and Minerals	[]	[]	[]
Telecommunications	[]	[]	[]
Other Services	[]	[]	[]

36. How would you rate export opportunities for US firms (to Thailand) in the following sectors (sectors are defined by consumer in Thailand)?

	Very Good	Good	Not Good
Agribusiness/Food Products	[]	[]	[]
Construction and Related Services	[]	[]	[]
Manufacturing	[]	[]	[]
Tourism/Restaurants/Hotels	[]	[]	[]
Transport	[]	[]	[]
Oil and Minerals	[]	[]	[]
Telecommunications	[]	[]	[]
Services	[]	[]	[]
Environmental Control	[]	[]	[]
Medical and Related Equipment	[]	[]	[]

37. How would you rate export opportunities for Thai firms (to the USA) in the following sectors (sectors are defined by producer in Thailand)?

	Very Good	Good	Not Good
Agribusiness/Food Products	[]	[]	[]
Plastic and Rubber Products	[]	[]	[]
Textile and Garments	[]	[]	[]
Automotive Parts and Accessories	[]	[]	[]
Gems and Jewelry	[]	[]	[]
Electronics	[]	[]	[]
Machinery, Tools & Equipment	[]	[]	[]
Wood Products	[]	[]	[]
Leather and Footwear Products	[]	[]	[]

38. How would you rate investment opportunities in Thailand for the following manufacturing subsectors?

	Highly Profitable	Somewhat Profitable	Not Profitable
Electronics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Machinery and Tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Automotive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Textile/Garments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chemicals/Petrochemicals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plastics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumer Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rubber Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

39. For the following manufacturing subsectors in Thailand, do you believe the best profit opportunities lie with production for the domestic market, regional markets or worldwide markets?

	Domestic Market	Regional Markets	Worldwide Markets
Electronics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Machinery and Tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Automotive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Textile/Garments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chemicals/Petrochemicals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plastics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumer Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rubber Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

40. Is your firm interested in developing new or additional commercial ties with U.S. companies?

Yes

No

If you answer "No" to question #40, go to question #45, otherwise proceed to next question.

41. What resources would you like to access from a U.S. firm?

- Capital
- Equipment/Materials
- Technology
- Managerial Expertise
- Access to Markets
- Other _____

42. What resources would you like to offer a U.S. firm?

- Capital
- Equipment/Materials
- Technology
- Managerial Expertise/Knowledge of local conditions
- Access to Markets
- Other _____

43. What forms of business collaboration with U.S. firms interest you?

	Very Interested	Somewhat Interested	Not Interested
Supplier (US firm as customer)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer (US firm as supplier)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production Arrangement/Contract Manufacturing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Joint Venture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Licensing or Technology Transfer Agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Franchise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management Agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consulting/Technical Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

44. Would you like your firm to be included in a **JUST Business** listing of companies which are interested in increasing commercial ties with U.S. firms?

Yes No

45. As proposed, **JUST Business** will be a non-profit organization run by leaders from both the Thai and U.S. business sectors with the purpose of promoting bilateral trade and investment between the United States and Thailand. Which of the following activities would you like **JUST Business** to offer?

	Very Interested	Somewhat Interested	Not Interested
General Trade Promotion Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trade Matchmaking Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Investment Promotion Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment Matchmaking Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trade and Investment Policy Analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trade and Investment Information Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

46. As proposed, **JUST Business** will be financed by the United States Agency for International Development (USAID) which has traditionally funded economic and social development programs. Do you think that **JUST Business**, while broadly promoting US-Thai commercial activities, should contain programs or components which:

	Strongly Agree	Agree	Disagree
encourage business development outside of Metropolitan Bangkok?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
encourage business development in the agricultural sector?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
encourage development of employment opportunities for the rural poor?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
encourage technology transfer and manpower training?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
encourage development of business opportunities for small- and medium-sized firms (both US and Thai)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

AGRIBUSINESS-SUPPLEMENTAL QUESTIONNAIRE

This section should only be answered by firms currently involved in the agriculture/agribusiness sectors.

1. In which of the following subsector(s) does your firm operate? (circle as many as apply)

- Agricultural production (raw material production)
- Fishing/Aquaculture
- Commercial Forestry
- Livestock
- Meat Processing
- Processing of agricultural products
- Processing of fish products
- Processing of wood products

2. In what agricultural products is your business involved (circle as many as apply)

- | | |
|--|--|
| <input type="checkbox"/> Rice | <input type="checkbox"/> Feed grains |
| <input type="checkbox"/> Cassava | <input type="checkbox"/> Sugarcane |
| <input type="checkbox"/> Rubber | <input type="checkbox"/> Cotton |
| <input type="checkbox"/> Palm Oil | <input type="checkbox"/> Coffee |
| <input type="checkbox"/> Livestock | <input type="checkbox"/> Fruits and Nuts |
| <input type="checkbox"/> Vegetables | <input type="checkbox"/> Spices |
| <input type="checkbox"/> Seed Production | <input type="checkbox"/> Horticulture |
| <input type="checkbox"/> Spices | <input type="checkbox"/> Tobacco |
| <input type="checkbox"/> Other _____ | |

3. In which agricultural processing activities is your business involved? (circle as many as apply)

- Processing food products (fruits, vegetables, food crops)
- Feedgrain processing
- Cassava pellets
- Rubber products
- Coffee processing
- Wood processing
- Paper and pulp products
- Nut processing
- Fishing processing
- Palm oil processing
- Meat processing
- Ginning, weaving
- Tobacco Processing
- Spice Processing
- Other _____

6. Please provide your best assessment of the profitability of new investments in Thailand for the following agricultural processing activities?

	Highly Profitable	Somewhat Profitable	Not Profitable
Processing food products (fruits, vegetables, food crops)	[]	[]	[]
Feedgrain processing	[]	[]	[]
Cassava pellets	[]	[]	[]
Rubber Products	[]	[]	[]
Coffee Processing	[]	[]	[]
Wood Processing	[]	[]	[]
Paper and Pulp Products	[]	[]	[]
Sugar Processing	[]	[]	[]
Nut Processing	[]	[]	[]
Fish Processing	[]	[]	[]
Palm Oil Processing	[]	[]	[]
Meat Processing	[]	[]	[]
Dairy	[]	[]	[]
Ginning/Weaving	[]	[]	[]
Tobacco Processing	[]	[]	[]
Spice Processing	[]	[]	[]
Other _____	[]	[]	[]

7. For the following processing activities do you believe the best opportunities lie in serving the domestic or export markets? (check only one for each activity)

	Domestic Market	Export Markets
Processing food products (fruits, vegetables, food crops)	[]	[]
Feedgrain processing	[]	[]
Cassava pellets	[]	[]
Rubber Products	[]	[]
Coffee Processing	[]	[]
Wood Processing	[]	[]
Paper and Pulp Products	[]	[]
Sugar Processing	[]	[]
Nut Processing	[]	[]
Fish Processing	[]	[]
Palm Oil Processing	[]	[]
Meat Processing	[]	[]
Dairy	[]	[]
Ginning/Weaving	[]	[]
Tobacco Processing	[]	[]
Spice Processing	[]	[]
Other _____	[]	[]

4. Please provide your best assessment of the profitability of new investments in Thailand for the following agricultural activities?

	Highly Profitable	Somewhat Profitable	Not Profitable
Rice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feed grains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cassava	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sugarcane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rubber	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cotton	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Palm oil	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coffee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Livestock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fruits and Nuts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vegetables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seed production	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Horticulture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tobacco	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. For the following agricultural activities do you believe the best opportunities lie in serving the domestic or export markets? (check only one for each activity)

	Domestic Market	Export Markets
Rice	<input type="checkbox"/>	<input type="checkbox"/>
Feed grains	<input type="checkbox"/>	<input type="checkbox"/>
Cassava	<input type="checkbox"/>	<input type="checkbox"/>
Sugarcane	<input type="checkbox"/>	<input type="checkbox"/>
Rubber	<input type="checkbox"/>	<input type="checkbox"/>
Cotton	<input type="checkbox"/>	<input type="checkbox"/>
Palm oil	<input type="checkbox"/>	<input type="checkbox"/>
Coffee	<input type="checkbox"/>	<input type="checkbox"/>
Livestock	<input type="checkbox"/>	<input type="checkbox"/>
Fruits and Nuts	<input type="checkbox"/>	<input type="checkbox"/>
Vegetables	<input type="checkbox"/>	<input type="checkbox"/>
Spices	<input type="checkbox"/>	<input type="checkbox"/>
Seed production	<input type="checkbox"/>	<input type="checkbox"/>
Horticulture	<input type="checkbox"/>	<input type="checkbox"/>
Tobacco	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>

8. Are you interested in accessing U.S. agribusiness technology?

Yes

No

If yes, please rate your interest in acquiring the following technologies from US firms?

	Very Interested	Somewhat Interested	Not Interested
Food Processing Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seed Multiplication Expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plant/Livestock Biotechnology and Breeding Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plant/Livestock Protection and Disease Control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Post Harvest Storage and Handling Technologies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Packaging Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aquaculture Technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Machinery and Agricultural Inputs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

INTERESTED PARTIES

Firms Which Would Like to Be Included in JUST Business Listing

Company	Contact
1 Agri Source Co.,Ltd.	Tim Welsh
2 Agri-Systems (Thailand) Co.,Ltd.	Richard J. Frankel
3 AMD (Thailand) Limited	James W.Phillips
4 American President Lines Limited	Tom L. Olsen
5 American Standard Sanitaryware (Thailand) Ltd.	Mrs. Walaitip Uthaisombut
6 Aquastar Laboratories	William Klausmeier
7 Asoke International	Michael Dowdy
8 Bangkok Bank Limited	Mr. Piti Sithi-Amnuai
9 Bechtel International, Inc.	F. R. Erskine
10 Berli Jucker Co.,Ltd.	Dr. Adul Amatavinadhana
11 Cargill Limited	Martin Dudhey
12 Chase Manhattan Bank	Kenneth White
13 Cigna P&C Insurance Company	Surin Tantisuvannakul
14 Citibank Thailand	David Hendrix
15 Colgate-Palmolive (Thailand) Limited	Mr. R. R. Martin
16 Connell Bros Co.,Ltd.	David L. Seldon
17 Crown Cork & Sbac (Thailand) Co.,Ltd.	T.D. Moore
18 Fluor Daniel Thailand Limited	W.L. Carter
19 G. Premjee Limited	Peter Fetersen
20 GSS Electronics (Thailand) Ltd.	Supawit Wuthi-udomlert
21 HMC Polymers Co.,Ltd.	J L Loupee
22 J.P. Rooney & Associates Limited	Jim Rooney
23 Kingfisher Holdings Limited	Mr. Manaschai Wanarat
24 Krasna & Associated Co.,Ltd.	Beth Krasna
25 Link-Carlyle Ltd.	Mr. Roy V. Tindula
26 Louis Berger	David James Mullgin
27 Louis T. Leonowens (Thailand) Limited	Mr. James C. Ciardelli
28 Manistec Ltd.	Marshall Parke
29 Marketing Pros	Mr. Suthep Prathong
30 National Starch & Chemical (Thailand) Ltd.	Mr. Suthep Prathong
31 Pacific Management Resources Co.,Ltd.	Mr. Anthony M.Zola
32 Pan Electronic Protection Systems, Ltd.	Charles V. Covington
33 Phelps Dodge Thailand Ltd.	Thomas J. White
34 Price Waterhouse	Mark Israelsen
35 Procter & Gamble	Mr. K. Munusaug
36 SCI Systems (Thailand) Ltd.	Mr. N. K. Ouek
37 Seamico Co.,Ltd.	Graham Lean
38 Standard Chartered Bank Thailand	Steve Weissman
39 Strongpack Co.,Ltd.	Mr. Rumpai Sukhyanga
40 Summit Auto Seats Industry Co.,Ltd.	Mr. Kowit Vachiradetchkoon
41 Thai Scott Paper Co.,Ltd.	Nakorn Visal-atapanth
42 Tilleke & Gibbins	David Lyman
43 Unical Thailand Ltd.	Graydon H. Laughboun Jr.
44 Warner Lambert (Thailand) Ltd.	Mr. A. K. Malik
45 Westpac Banking Corporation	Philip W. Forest
46 Yip In Tsoi & Jacks Ltd.	Tawat T.Yip n Tsoi