

Executive Summary

At present the structure of business trade, services and industrial activity, has changed dramatically. There are new kind of business in the economy, including the small scale industries and home industry which has a role in the economic growth of the country as a whole increased. Therefore, statistical data on basic information of the business is important and necessary for the public and private sector in policy formulation and development planning of economic and industry in both the national and provincial level, to increase competitiveness in the global trade arena. The National Statistical Office (NSO) proposed by the key government agencies, including the Office of Industry Economics, the Ministry of Industry, Office of the National Economic and Social Development Board, Bank of Thailand and the Ministry of Commerce, to conduct the Industrial Census every 5 years, there for, the basic information obtained by the census can be used for both government and private sectors in various aspects.

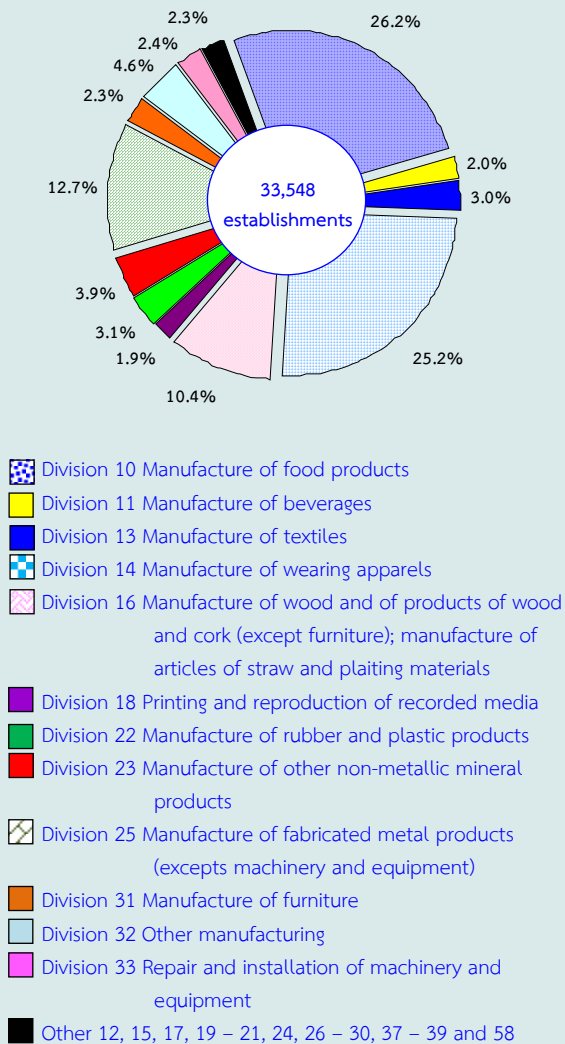
The NSO had carried The Business trade and Services Census for 3 times, in 1966 and 1988 and 2002. The Industrial Census had been conducted 3 times as well, in 1964 and 1997, in 2007. For the year 2012 will mature around 10 years for conducting the Census of Business trade and Services and 5 years for conducting the Census of Industrial. The NSO had integrated of such a census named “The 2012 Business trade and Industrial Census”.

The data presents in this report was the results of the 2012 Business and Industrial Census: Manufacturing Industry. The statistical methodology using for the establishments with 1 – 10 persons engaged were a sample survey and for the establishment with 11 persons engaged and over were completely enumerated. The enumeration stage, field work was conducted during May 1 to August 30, 2011. The data presented the operational information of manufacturing establishment in **Southern region** in the year 2011 (January 1 – December 31, 2011) and classified by Thailand Standard Industrial Classifications (TSIC-2009). The main findings are as follows:

Number of establishments by division of industry

The results of the 2012 Business and Industrial Census, there were totally 33,548 **manufacturing** establishments in the Southern region. The highlight industries of this region were *manufacture of food products* and *manufacture of wearing apparels*. There were about 26.2 and 25.2 percent respectively. The followings were *manufacture of fabricated metal products (excepts machinery and equipment)* (about 12.7 percent) *manufacture of wood and of products of wood and cork (except furniture); manufacture of articles of straw and plaiting materials* (about 10.4 percent) and *other manufacturing* (about 4.6 percent) respectively. The other divisions of industry, not mentioned above, each division had less than 4.0 percent.

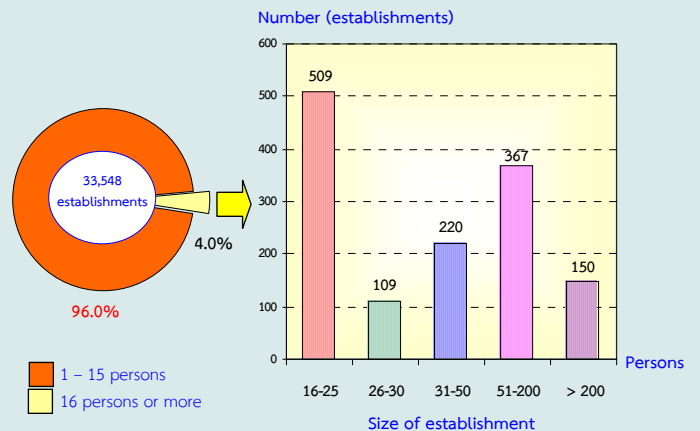
Figure A Percentage of manufacturing establishments by division of industry



Size of establishment

Most of manufacturing establishments (about 96.0 percent or 32,193 establishments) were establishments with 1 – 15 persons engaged. The establishments with 16 persons or more were about 4.0 percent or 1,355 establishments of this number, establishments with 16 – 25 persons, 51 – 200 persons, 31 – 50 persons were about 509, 367 and 220 establishments respectively. The establishments with more than 200 persons and 26 – 30 person, were about 150 and 109 establishments respectively.

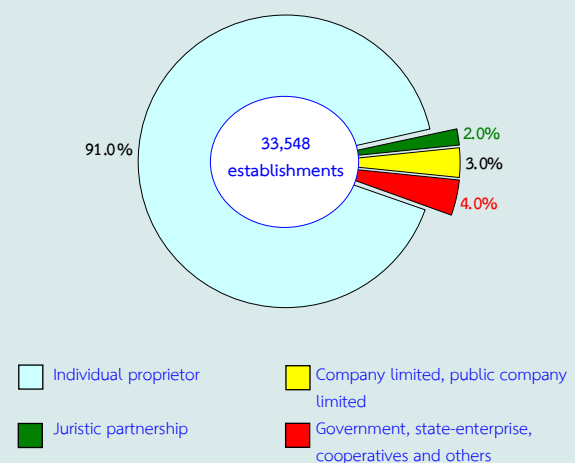
Figure B Number of manufacturing establishments by size of establishments (number of persons engaged)



Form of legal organization

Most establishments (about 91.0 percent) were individual proprietor. The establishments, which were in the form of government, state-enterprise, cooperatives and other was about 4.0 percent. For those, which were company limited, public company limited and juristic partnership had proportions, of about 3.0 and 2.0 percent respectively.

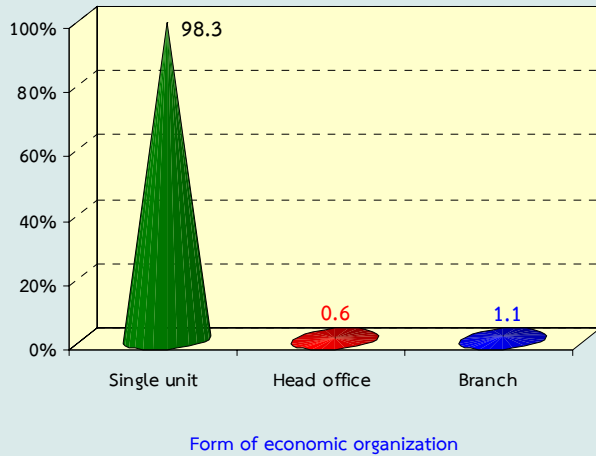
Figure C Percentage of manufacturing establishments by form of legal organization



Form of economic organization

The manufacturing establishments in the Southern region (about 98.3 percent) were in form of single unit. About 1.1 percent was an office branch or subsidiary and about 0.6 percent was head office.

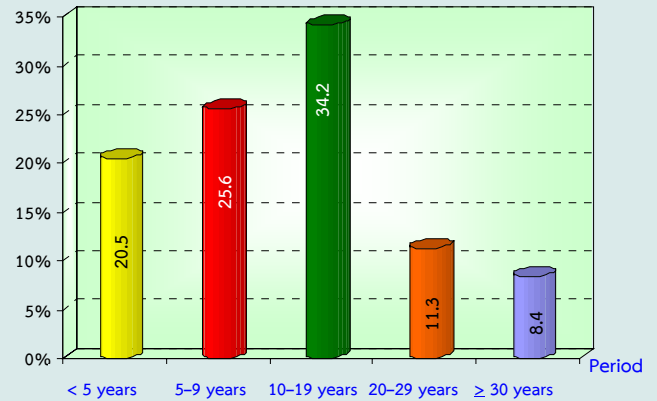
Figure D Percentage of manufacturing establishments by form of economic organization



Period of operation

Most of the establishments (about 34.2 percent) have operated their manufacturing for 10 – 19 years. The establishments operated their manufacturing for 5 – 9 year and less than 5 years were about 25.6 and 20.5 percent respectively. The establishments operated their manufacturing for 20 – 29 years was about 11.3 percent. While the establishments operated their manufacturing for 30 years or more had the lowest proportion of about 8.4 percent of the total.

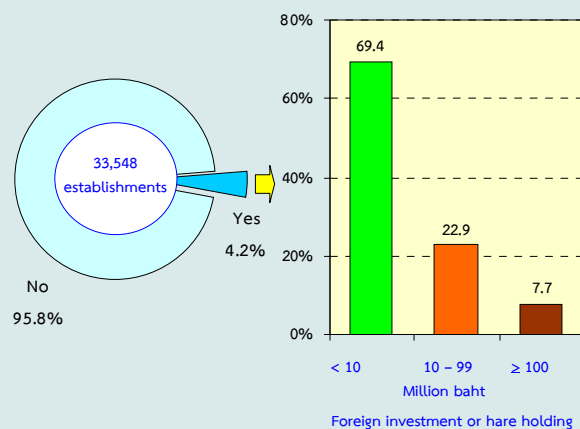
Figure E Percentage of manufacturing establishments by period of operation



Register capital

The number of manufacturing establishments in the Southern region with registered were about 1,394 establishments or about 4.2 percent of the total. Out of these, most of them (about 69.4) had less than 10 million baht of registered capital. Those with 10 – 99 million baht of registered were about 22.9 percent. The establishment with 100 million baht of registered and over was only 7.7 percent.

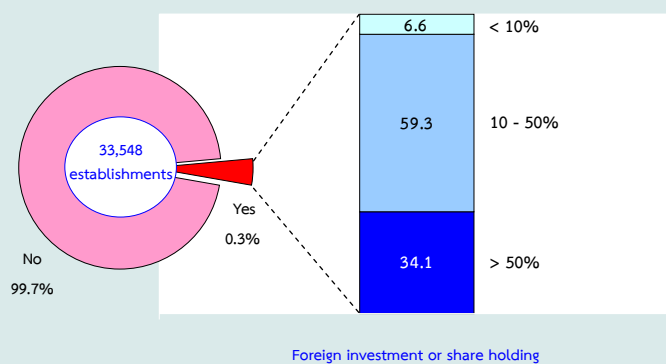
Figure F Percentage of manufacturing establishments by foreign investment or share holding



Foreign investment or share holding

For the foreign investment share holding in the Southern region, form corporate establishment (company limited and public company limited) had about 99.7 percent had no foreign investment or share holding. For the establishments with foreign share holding about 0.3 percent did. Out of these, about 59.3 percent was 10 – 50% of share holding and about 34.1 percent was over 50% of share holding. The rest of about 6.6 percent was less than 10% of share holding.

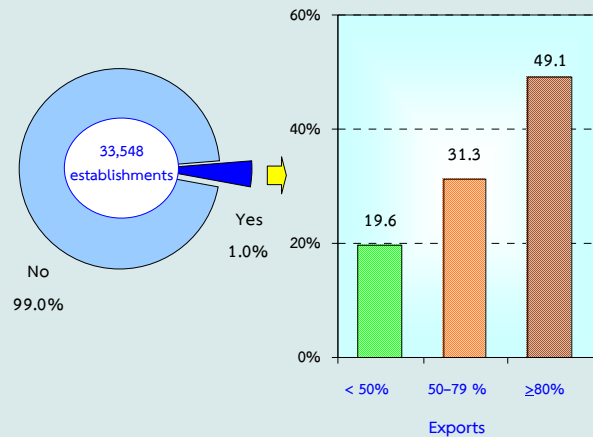
Figure G Percentage of manufacturing establishments by foreign investment or share holding



Export

For the export of goods of manufacturing establishments, there were only 344 establishments or 1.0 percent. Out of these, about 49.1 percent. Exported with over 80% of the total sales of goods produced about 31.3 had the proportion of exported between 50 – 79%. The rest of about 19.6 percent with less than 50% of export.

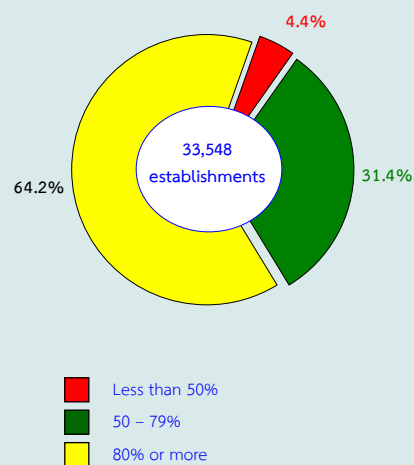
Figure H Percentage of manufacturing establishments by export



Capacity utilization rate

The average capacity utilization rate in 2011 of manufacturing establishments was about 80%. The majority of manufacturing establishments (about 64.2 percent) had capacity utilization rate about 80% or more. The establishment with the capacity utilization rate between 50 – 79% was about 31.4 percent. While those with capacity utilization rate less than 50% was about 4.4 percent.

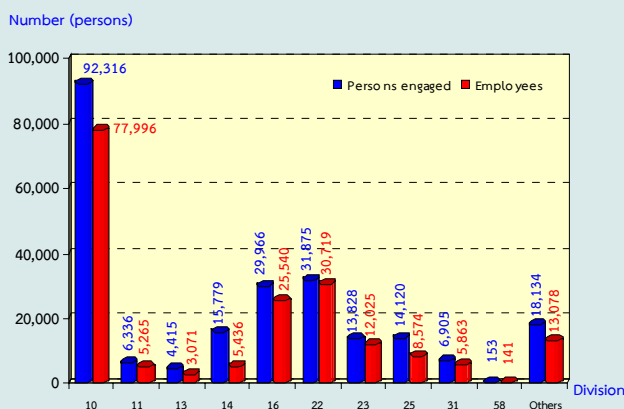
Figure I Percentage of manufacturing establishments by capacity utilization rate



Number of persons engaged and employees

In 2011 the workers of the manufacturing establishments in the Southern region were totally 233,827 persons. In term of employees, there were totally 187,708 persons. Most of them about 41.6 percent worked in *manufacture of food products*. Followed by those worked in *manufacture of rubber and plastic products* about 16.4 percent. The *manufacture of wood and of products of wood and cork (except furniture); manufacture of articles of straw and plaiting materials* about 13.6 percent. The other division of industry not mentioned above, each division had less than 10.0 percent.

Figure J Number of persons engaged and employees of manufacturing establishments by division of industry



Note : Persons engaged refer to owner or juristic partnerships unpaid worker and employees.

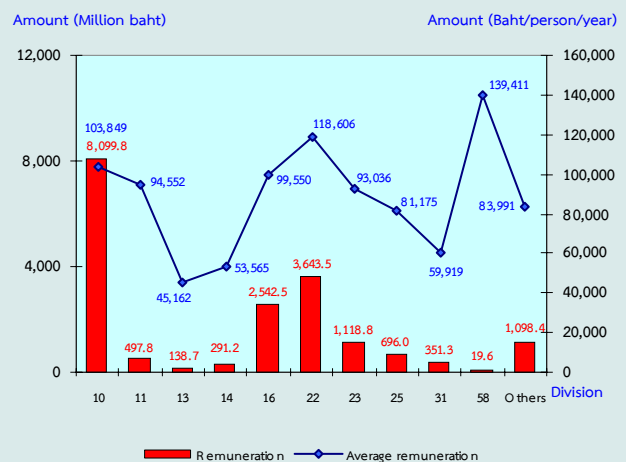
Division of industry:

Division 10 Manufacture of food products
 Division 11 Manufacture of beverages
 Division 13 Manufacture of textiles
 Division 14 Manufacture of wearing apparels
 Division 16 Manufacture of wood and of products of wood and cork (except furniture); manufacture of articles of straw and plaiting materials
 Division 22 Manufacture of rubber and plastic products
 Division 23 Manufacture of other non-metallic mineral products
 Division 25 Manufacture of fabricated metal products (excepts machinery and equipment)
 Division 31 Manufacture of furniture
 Division 58 Publishing activities
 Others 12, 15, 17 – 21, 24, 26 – 30, 32 – 33 and 37 – 39

Remuneration

In 2011 the employees working in manufacturing establishments in the Southern region received the total remuneration about 18,497.6 million baht or 98,545 baht per person annually. The employees engaged in *publishing activities* received annual remuneration higher than the other, of about 139,411 baht per person. Those engaged in *manufacture of rubber and plastic product* received the annual remuneration about 118,606 baht per persons respectively.

Figure K Remuneration of manufacturing establishments by division of industry



Division of industry:

Division 10 Manufacture of food products
 Division 11 Manufacture of beverages
 Division 13 Manufacture of textiles
 Division 14 Manufacture of wearing apparels
 Division 16 Manufacture of wood and of products of wood and cork (except furniture); manufacture of articles of straw and plaiting materials
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Value of gross output, intermediate consumption and value added

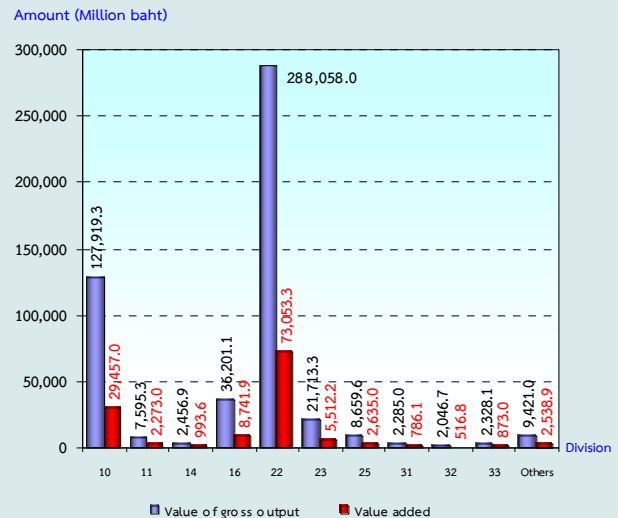
In 2011, the value of gross output of manufacturing establishments was totally 508,684.4 million baht. The intermediate consumption and value added were totally 381,303.5 and 127,380.9 million baht respectively. Comparing the value added to value of gross output was about 25.0 percent.

For the average value of gross output were about 15.2 million baht per establishment and 2.2 million baht per person. In terms of the average value added, these were about 3.8 million baht per establishment and 544,766 baht per person respectively.

Considering by division of industry, it was found that establishments engaged in *manufacture of rubber and plastic products* had the highest average value of gross output per establishment about 272.8 million baht and average value of gross output per person about 9.0 million baht respectively.

For the establishments engaged in *manufacture of rubber and plastic products* had the highest average value added per establishment and per person had about 69.2 and 2.3 million baht respectively. The following engaged in *manufacture of coke and refined petroleum products* had average value of gross output and average value added per person, of about 29.7 and 1.3 million baht respectively.

Figure L Value of gross output and value added of manufacturing establishments by division of industry



Value added = Value of gross output – Intermediate consumption

Value of gross output refers to receipts of establishment in 2006

Intermediate consumption refers to all expenses on the production process of goods or services in the establishment in 2011

Division of industry:

Division 10 Manufacture of food products

Division 11 Manufacture of beverages

Division 14 Manufacture of wearing apparels

Division 16 Manufacture of wood and of products of wood and cork (except furniture); manufacture of articles of straw and plaiting materials

Division 22 Manufacture of rubber and plastic products

Division 23 Manufacture of other non-metallic mineral products

Division 25 Manufacture of fabricated metal products (excepts machinery and equipment)

Division 31 Manufacture of furniture

Division 32 Other manufacturing

Division 33 Repair and installation of machinery and equipment

Others 12 – 13, 15, 17 – 21, 24, 26 – 30, 37 – 39 and 58

Data comparison of manufacturing establishments during 5 years

Comparing the data of the 2012 Business and Industrial Census and the 2007 Industrial Census, which the operation period was of the year in 2011 and 2006, the results showed that number of manufacturing establishment and number of persons engaged decreased by 8.5 and 2.4 percent respectively. While the average number of person engaged per establishment increased by 7.7 percent.

Table A Principal data of manufacturing establishments in year 2006 and 2011

Data items	2006	2011	% Change
Number of establishments (Establishments)	36,671	33,548	-8.5
Number of persons engaged (Persons)	239,513	233,827	-2.4
<i>Average establishment (Persons)</i>	<i>6.5</i>	<i>7.0</i>	<i>7.7</i>
Number of employees (Persons)	190,768	187,708	-1.6
<i>Average establishment (Persons)</i>	<i>5.2</i>	<i>5.6</i>	<i>7.7</i>
Remuneration (Million baht)	16,174.2	18,497.6	14.4
<i>Average annual per employee (Baht)</i>	<i>84,784.8</i>	<i>98,544.5</i>	<i>16.2</i>
Value of gross output (Million baht)	358,854.6	508,684.4	41.8
<i>Average per establishment (Thousand baht)</i>	<i>9,785.8</i>	<i>15,162.9</i>	<i>54.9</i>
<i>Average per person (Thousand baht)</i>	<i>1,498.3</i>	<i>2,175.5</i>	<i>45.2</i>
Intermediate consumption (Million baht)	275,905.2	381,303.5	38.2
<i>Average per establishment (Thousand baht)</i>	<i>7,523.8</i>	<i>11,365.9</i>	<i>51.1</i>
<i>Average per person (Thousand baht)</i>	<i>1,151.9</i>	<i>1,630.7</i>	<i>41.6</i>
Value added (Million baht)	82,949.4	127,380.9	53.6
<i>Average per establishment (Thousand baht)</i>	<i>2,262.0</i>	<i>3,797.0</i>	<i>67.9</i>
<i>Average per person (Thousand baht)</i>	<i>346.3</i>	<i>544.8</i>	<i>57.3</i>

In terms of employment, number of employees decreased by 1.6 percent. It is noticeable that the average number of employees per establishment increased by 7.7 percent. However, the annual remuneration during 5 year increased by 14.4 percent.

For the value of gross output, intermediate consumption and value added of manufacturing establishments during 5 year increased by 41.8, 38.2 and 53.6 percent respectively.

Data summary and recommendation

The results of the 2012 Business and Industrial Census, show that there were totally 33,548 manufacturing establishments in the Southern region. Most of them were small scale establishments with 1 – 15 person of about 96.0 percent. The highlight industry was *manufacture of food product*

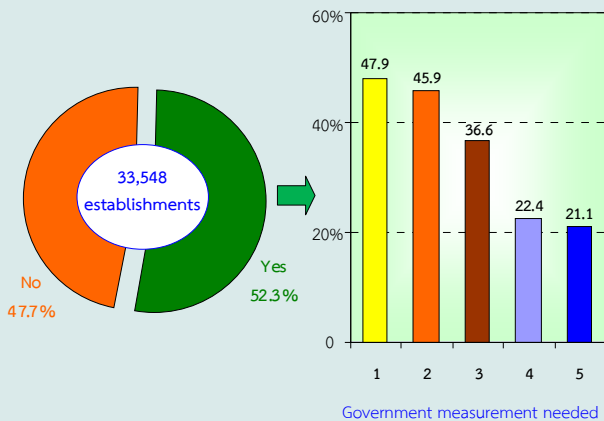
(about 26.2 percent). There were totally 0.2 million persons and out of these, about 0.2 million persons were employees. They received the annual remuneration, of about 98,545 baht per person. The manufacturing establishments contributed value of gross output, intermediate consumption and value added of about 508,684.4, 381,303.5 and 127,380.9 million baht respectively.

Comparing the data of the 2012 Business and Industrial Census and the 2007 Industrial Census, as the result, the operation of establishment in the Southern region during 5 years ago has gradually grown because, the world economy slowed down due to the flood crisis causing the number of establishments and employment decreased in Southern region.

- **Governments measurement needed**

For the manufacturing establishments in the Southern region had no government measurement needed (about 47.7 percent), the rest of about 52.3 percent did. The government measurement needed the top 5 series i.e. reduce production cost (about 47.9 percent), investment promotion to operators (about 45.9 percent), find out the low interest of loan (about 36.6 percent), provide training and skill employee development (about 22.4 percent), expand the market for buy purchase (about 21.1 percent) respectively.

Figure M Percentage of manufacturing establishment by government measurement needed the top 5 series



Note: The establishment can be done by more than 1

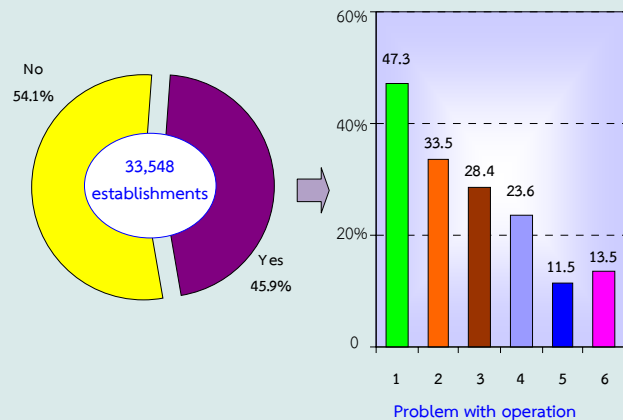
Government measurement needed:

1. Reduce production cost
2. Investment promotion to operators
3. Find out the low interest of loan
4. Provide training and skills employee development
5. Expand the market for buy purchase

- **Problem with operation**

The establishment, about 45.9 percent reported had problem with operation. Most of them about 47.3 percent inadequate capital problems. The following were labor shortage, raw material shortages used in the production and product market were about 33.5, 28.4 and 23.6 percent respectively. While the uncertainty of government trade policy was about 11.5 percent.

Figure N Percentage of manufacturing establishment by problem with operation



Note: The establishment can be done by more than 1

Problem with operation:

1. Inadequate capital
2. Labor shortage
3. Raw material shortages used in the production
4. Product market
5. Uncertainty of government trade policy
6. Other