

中总2014下半年大马经济状况

ACCCIM Survey Report on 调查报告

Economic Situation of Malaysia

for the 2nd half of year 2014

30-3-2015



中总总会长拿督林国璋局绅(右4)召开新闻发布会,公布2014下半年大马经济状况调查报告。前排左起为吴建国、王生福博士、白文春、梁家兴博士,右起为林泰顺、拿督罗烈贤和拿督卢成全。Dato' Lim Kok Cheong, President of ACCCIM chaired a press conference to announce the ACCCIM Survey Report on Economic Situation of Malaysia for the 2nd Half of 2014. Front row from left: Mr. Ng Kean Kok, Dr. Ong Seng Fook, Mr. Peck Boon Soon, Dr. Leong Kai Hin. Front row from right: Mr. Lim Tai Soon, Dato' Loh Liam Hiang and Dato' Low Kian Chuan.

中总商务组之经济调查小组于2015年3月30日,于中总会议厅公布2014下半年大马经济状况调查报告。

本次调查涵盖了多项当前工商界所关注的课题,即成本上涨、国际市场商品价格、AEC、令吉兑换率对业务的影响,以及业者对政府实施消费税的准备等。

中总总会长拿督林国璋局绅在主持新闻发布会时表示,根据国家银行在2015年2月的宣布,我国经济在2014年第4季度增长达到5.8%,2014年平均取得6.0%的增长,尽管我国经济增长保持稳健,但是市场依然出现许多不稳定因素皆影响企业的持续经营,其中包括全球原油价从2014年11月开始下挫,令吉对主要货币的持续疲弱,导致2015年1月消费者物价指数普遍攀升,通货膨胀压力上升等。

他指出,各行各业为配合消费税的落实,购置了新会计软件、寻求税务专家咨询并培训人员,这一切都会对公司的现金流量带来冲击,对市场

的消费情绪也会造成影响。由于商家特别是中小型企业需要时间去适应消费税,拿督林国璋局绅促请关税局给予商家缓冲期,与商家们加强沟通并给予适当引导,避免对不小心犯错的商家采取严厉的法律行动及惩罚。他认为,官商相互配合,将有助于促进消费税顺利实施。

他表示,大马经济与政局稳定一直都是海外投资者考量的因素之一,大马工商界继续期待政府能够持续贯彻以中庸理念治国,维护社会稳定和谐,积极营造亲商安商的良好环境,全力拼经济,以吸引更多的外资涌进大马,刺激本地经济发展。

此外,他也提醒业者必须加强适应能力,及时采取有效的调整措施。东盟经济共同体(AEC)即将于2015年杪之前落实,我国政府已积极努力提高工商业界对落实东盟经济共同体的目的、其所带来的好处,及对企业影响的认识与了解。他呼吁商家们应当为东盟经济共同体做好准备,使得大马企业在和其他东盟国家竞争中占有优势,从中获利。

拿督林国璋局绅也感谢商务组经济调查小组与拉曼大学合作完成这项调查。此外,也对国内各大媒体的持续支持及广泛报道这项调查计划表达万分谢意。

调查重点摘要

调查的意义

- 协助政府，测定华商所面对的经济状况。
- 收集华商对政府所实行的各项措施的回馈与意见，让政府评估这些措施的有效性。
- 协助政府调整现有的政策或制定新的政策。
- 此调查的结果也作为马来西亚中华总商会(中总)向政府提呈备忘录的根据，以及作为工商界和外国投资者制定投资计划与策略的参考。

回复者的背景

- 回覆者主要来自批发与零售业 (24.2%)、制造业 (16.8%)、专业与商业服务 (16.5%)、建筑业 (8.8%)、房地产 (8.0%)、金融和保险(4.9%) 以及其他 (20.8%)。
- 近15.4%的回覆者来自大型企业 (根据常年营业额及全职员工人数)。
- 约(80.5%)回覆者是以国内市场为导向，其余 19.5%则以“国内及出口市场” (11.3%)及“出口市场” (8.2%)为导向。

调查的主要问题及结果

- i. 大马经济在2014下半年是否恶化，保持不变或成长？
 - ❖ 销售业绩表现稍微下滑
 - ❖ 产量稍微下跌
 - ❖ 存货水平保持不变
 - ❖ 收账情况满意
 - ❖ 国外新订单稍微减少
 - ❖ 本地新订单保持不变
 - ❖ 本地售价保持不变
 - ❖ 就业市场相对保持不变
 - ❖ 每单位产品/服务工资相对保持不变
 - ❖ 产能应用下跌
 - ❖ 更多回覆者选择减少对新资源或厂房的投资

大马经济在 2014下半年的增长较为软弱。

- ii. 在2014下半年，对商业业绩表现造成不利影响的主要因素是什么？

- ◆ 政府政策
- ◆ 国内的竞争
- ◆ 运作成本与原料价格提高
- ◆ 员工短缺

- iii. 华商对大马经济前景是否感到乐观或悲观？

- ❖ 总的来说，华商普遍上对2015年和2016年的经济前景感到稍微悲观，但期盼2017年的经济有所改善。

- iv. 目前华商在马来西亚从事贸易，投资与工业发展所面对的问题：

A. 成本上涨

- ❖ 多达70%的回覆者投诉他们的营运成本有明显上涨。
- ❖ 有57%的回覆者认为在当前的经商环境下仍旧能够维持生意，另43%的回覆者则认为他们将在未来几个月经商会面对很大的难题。
- ❖ 大部分(52%)回覆者相信他们会有方法来减缓成本上涨所带来的影响。
- ❖ 其余48%则表示他们会将成本上涨所带来的影响转嫁给消费人或最终用户。

B. 国际市场商品价格

- (a) 国际商品价格下滑对马来西亚的经济有什么影响
 - ❖ 85%回覆者压倒性认为价格下滑会对大马经济带来明显负面影响，尤其影响大马出口业的收入。
- (b) 公司/业务运作会不会受国际商品价格下跌，尤其是2015年的原油价格所影响
 - ❖ 约40%回覆者认为，国际商品价格下跌，他们的业绩将受到负面影响，预料更低的需求和消费开支将造成收益减少。约39%回覆者则表示对他们的业绩会有正面影响。
- (c) 原油价格下滑，公司的产品与服务售价有没有下调
 - ❖ 70%回覆者表示他们不认为产品和服务的售价会因此下跌。

- (d) 以往,国际原油价格上涨立刻导致电费提高上升。如今,国际原油价格下滑跌,电费有否因此相应公平调整?
- ❖ 尽管全球石油价格下跌,约70%回覆者不认为电费在近期内会明显下调。

C. 东盟经济共同体 (AEC) 2015

- (a) 公司应对东盟经济共同体之整合的准备
- ❖ 约68%回覆者表示不确定自己的准备是否足够。
- (b) 东盟经济共同体的整合将会对生意有什么影响
- ❖ 超过一半的回覆者表示他们并不清楚AEC的实施对他们业务的影响。只有小部分回覆者认为有正面影响(18%回覆者)和负面影响(13%回覆者)。

D. 其他

- (a) 截至2014年12月的最后几个月,马来西亚令吉对外币,特别是一些主要货币汇率均大幅度贬值。

- (i) 令吉在未来的几个月会持续贬值吗?
- ❖ 大部分百分比的回覆者(87%)相信,令吉的价值在未来兑其他主要货币将继续下滑。
- (ii) 令吉贬值是否对您公司产品和服务的销售价和成本造成影响?
- ❖ 令吉贬值,几乎所有的回覆者表示他们无论是在销售价和/或成本上都会受到影响。
 - ❖ 约62%回覆者担心令吉的浮动会影响销售价及成本。

- (b) 马来西亚频频发生不幸事件。最近发生的事件为东海岸严重水灾和印尼亚航客机失事。您认为这些事件是否会对马来西亚旅游业造成负面影响吗?
- ❖ 86%回覆者认为这些事件会对马来西亚旅游业造成负面影响。
- (c) 您公司对将于2015年4月1日推行的物品及消费税做好准备了吗?
- ❖ 约86%回覆者有信心表示他们对实施物品及消费税做好准备。

EXECUTIVE SUMMARY

Significance of the survey

- ❖ To assist the Government in gauging the economic situation facing the Chinese business community.
- ❖ To collect feedback and opinion on various measures undertaken by the Government to enable them to evaluate the effectiveness of those measures.
- ❖ This study would be helpful to the Government either in making adjustments to the existing policies or in the formulation of new policies.
- ❖ The results from the survey also provide a basis for ACCCIM to submit relevant memoranda to the Government and serve as a reference for the business community and foreign investors in formulating investment plan and strategy.

Profile of respondents

- ❖ The respondents were mainly from wholesale and retail (24.2%), manufacturing (16.8%), professional and business services (16.5%), construction (8.8%), real estate (8.0%), and finance and insurance (4.9%), as well as others (20.8%).
- ❖ About 15.4% of the respondents were from “Large Company” (according to annual turnover and number of full time employees).
- ❖ About 80.5% of the respondents were “Domestic” market oriented whereas the remaining 19.5% focused on “Both Domestic and Export” markets (11.3%) or ‘Export’ market (8.2%).

Major survey questions and findings

The major survey questions are as follows :

1) Was the Malaysian economy deteriorating, remaining unchanged or growing in the 2nd half of 2014 ?

- Slight Decline in Sales Performance
- Marginal Drop In Production Volumes
- Unchanged Inventory levels
- Satisfactory Collections from Customers
- Slight Decrease in New Orders from Overseas Markets
- New Local Orders Largely Unchanged
- Local Sales Prices Maintained
- Employment Market Relatively Unchanged
- Wage Costs Per Unit of Output Relatively Unchanged
- Drop in Capacity Utilization Levels
- More Respondents Choosing to Reduce Investments in New Resources or Plant

The Malaysian economy was seen to have experienced weaker growth in the 2nd half of 2014

2) What were the major factors adversely affecting business performances in the 2nd half of 2014 ?

- i. Government policies
- ii. Domestic competition
- iii. Increase in operating cost and price of raw materials
- iv. Manpower shortage

3) Is the Chinese business communities optimistic or pessimistic about the Malaysian economic outlook ?

Overall, the Chinese business community is generally more pessimistic about the economic

outlook for Malaysia for 2015 and 2016 but are looking towards an improvement in 2017.

4) Current issues facing the Chinese businessmen in relation to trade, investment and industrial development in Malaysia.

(A) Increase In Cost

- An overwhelming 70% of respondents complained that their businesses had experienced significant increase in costs of doing businesses
- 57% of respondents opined that they would still be able to maintain their operations in their existing status with the remaining 43% claiming that they would face significant business difficulties in the future.
- The majority of businesses (52%) believed that they had some form of solutions to mitigate the effects of rising costs
- The balance 48% claimed that they would be able to pass on the effects of rising costs onto the customers or end-users

(B) World Prices of Commodities

(a) ***The decrease in world prices of commodities will have a significant impact on the performance of the Malaysian economy***

- An overwhelming 85% of the respondents opined that such drops in commodity prices should have a significant negative impact on the Malaysian economy, in particular impacting hard on Malaysia's export earnings.

(b) ***Business' operations and performance are expected to be affected by the decrease in prices of commodities, especially the price of petroleum in 2015***

- Some 40% of respondents opined that their businesses would be affected negatively, in the form of lower earnings arising from expected lower demand and consumer spendings. Some 39% of respondents, on the other hand, would be positively impacted.

(c) No expectation of any decrease in selling prices of the company's / business' products given the expected decrease in price of petroleum

- 70% of respondents maintained that they do not expect any decrease in selling prices of their business products and services.

(d) In the past, whenever there was an increase in price of petroleum, the electricity tariff will be increased immediately. Now as the price of petroleum is falling, do you see any corresponding fair adjustment in the electricity tariff?

- Close to 70% of respondents did not expect the electricity tariffs to be reduced significantly in the near future, despite the drop in world oil prices.

(C) ASEAN Economic Community (AEC) 2015

(a) Company's preparations for the impending integration under AEC

- Some 68% of the respondents expressed that they were not sure of what preparations they ought to make and whether their preparations in themselves would be adequate.

(b) Will business be affected by the impending integration under AEC

- More than half of the respondents were are unsure of the impact that AEC would pose on their businesses. Only small groups of respondents felt that there would be positive (18% of respondents) and negative (13% of respondents) effects respectively.

(D) Others

(a) The recent months ending up till the end of December 2014 have seen Ringgit Malaysia depreciated significantly against other foreign currencies, in particular some major currencies.

- (i) Do you think Ringgit Malaysia will continue its decline in the coming months?

- An overwhelming percentage of respondents (87%) believed that the value of Ringgit Malaysia would continue its downward slide against other major currencies in the coming future.

- (ii) Has the depreciation of Ringgit Malaysia affected the selling prices and costs incurred by your business?

- Almost every respondent maintained that he would be affected in one way or another, whether in the form of selling prices and/or costs.

- Some 62% of respondents feared for the impact of the movement of Ringgit Malaysia on both their selling prices and costs.

(b) Most recent events such as the major floodings in Malaysia and the mishap surrounding AirAsia Indonesia have a negative effect on Malaysia's tourism industry

- 86% of the respondents opined that these events would have a negative effect on Malaysia's tourism industry

(c) Companies are ready for the impending implementation of Goods and Services Tax (GST) come 1 April 2015

- Some 86% of the respondents were confident that their businesses would be ready for the implementation of GST.

