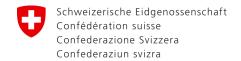






Naoko Wada Swiss Business Hub Japan Export Promotion

7. March 2016



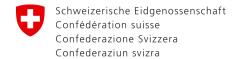


Essential Economic Data

| | 2012 | 2013 | 2014 | 2015 | As Conguesta Spirit Spirit Spirit |
|--|---------|---------|---------|---------|--|
| GDP (Nominal, Yen billion) | 475'110 | 479'084 | 486'939 | 498'897 | Jumphi Am S Macrostok Futternity - Ayahoda Openiji |
| GDP (Nominal, USD billion) | 5'957 | 4'920 | 4'602 | 4'116 | Angel |
| GDP per capita (Nominal, USD) | 46'683 | 38'633 | 36'222 | 32'481 | See of Agent |
| GDP growth rate (real, %) | 1.7 | 1.4 | 0.0 | 0.4 | Nogge Chapter Gargeon Chapter 1997a. Visionina |
| CPI Inflation (All items, average of the period) | 0.0 | 0.4 | 2.7 | 0.8 | Ja Humang dees Jaka Japan Popic Jaka Oisan Japan Johan |
| Population (million persons) | 127.6 | 127.3 | 127.1 | 126.7 | Girlenoto Nagasali Mryazati |
| Unemployment rate (%) | 4.3 | 4.0 | 3.6 | 3.4 | Assertion of |

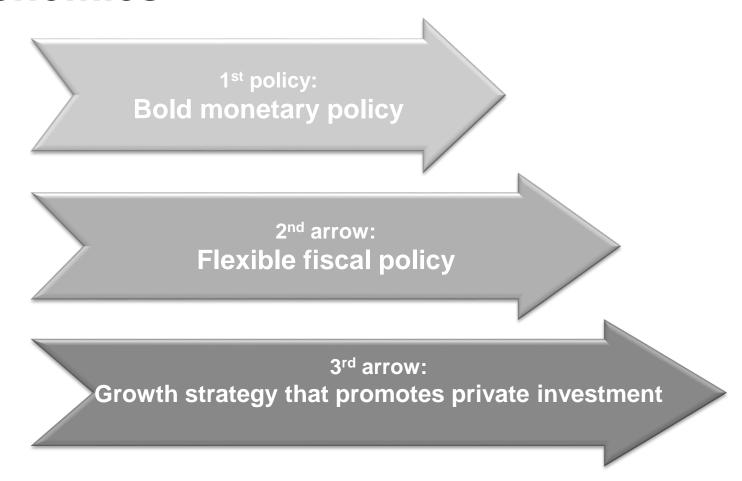
Sources:

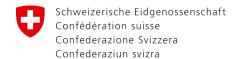
International Monetary Fund, World Economic Outlook Database, April 2015 http://www.imf.org/external/pubs/ft/weo/2015/01/weodata/weoselgr.aspx Cabinet Office, Government of Japan





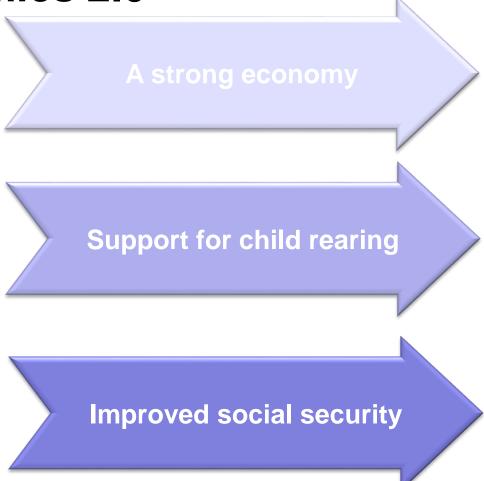
Abenomics

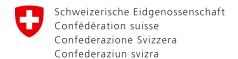






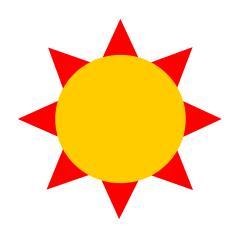
Abenomics 2.0







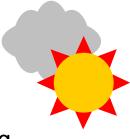
Industry Weather Forecast



Aerospace/
 Aviation



- Construction
- Food/Beverage
- Securities
- Heavy Electric Machienery
- Medical Equipment
- Transport
- Chemical
- Robot

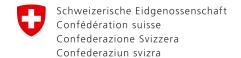


- Printing
- Cement
- Office Appliance
- Textile



Gas

Source: Nikkan Kogyo Shinbun







- Engineering
- **Machine Tools**
- Automobil (incl. Trucks)
- Automobil Parts / Components
- **Pharmaceutical**
- Semiconductors
- Railroad vehicle
- **Electronic Components**
- Paper/Pulp
- **Telecommunication**
- Home Appliance

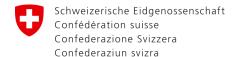


- Ship Building
- **Construction Machine**



- Steel/Nonferrous Metals
- Electric Power

Source: Nikkan Kogyo Shinbun





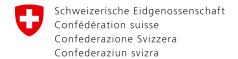
Construction Industry



Estimated economic effects ->

3 - 21 trillion yen!!

| Projects | Budget (Yen) | Project starts in | ends in |
|---|-----------------|----------------------|---------|
| Olympic stadium | 150 Bn | n/a | 2020 |
| Olympic villages | 0,3 Trillion | 2016 | 2019 |
| Hotels | 0,8 Trillion | 2015 | 2020 |
| Highways | 2 Trillion | 2000 | 2020 |
| Redevelopment of Tsukiji, Ginza, Shinagawa, Shinjyuku, Shibuya, Ikebukuro area | 4 Trillion | 2000 | 2020 |
| Casino | 0,8 Trillion | n/a | n/a |





Robot Industry & Nursing Industry



Population:

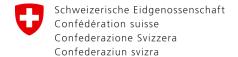
2015 126.8 Mio

2030 117 Mio

2050 100 Mio

- The elderly (aged 65 years and over) is estimated to account for 31.7% of the total population in 2030 and 39.8% in 2050, compared with 26.7% in 2015.
- Service sector accounts for 70% of GDP

Information source: projections made by the national Institute of Population and Social Security Research





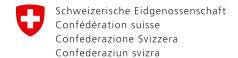






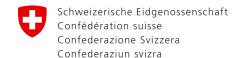


Source: Yokohama city











Trade between Switzerland and Japan

Swiss trade of goods with Japan (2015)

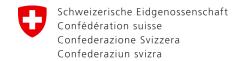
• Exports: CHF 6.6 Bn

• **Imports**: CHF 3.6 Bn

| Major Exports from CH to JP | % | % Var. 2014/2015 |
|-----------------------------|------|---------------------|
| Pharmaceuticals (HS30) | 35.8 | 5.3 |
| Chemicals (HS28-29) | 4.7 | -21.9 |
| Watches (HS91) | 19.8 | -1.9 |
| Machinery (HS84) | 6.8 | 10.1 |
| Medical Devices | 9.2 | 6.9 |
| Precious Metals (HS71) | 10.3 | 23.4 |

| Major Imports from JP to CH | % | % Var. 2014/2015 |
|-----------------------------|------|---------------------|
| Pharmaceuticals (HS30) | 12.5 | 12.5 |
| Chemicals (HS28-29) | 5.9 | 5.9 |
| Vehicles (HS86-89) | 19.2 | -3.7 |
| Machinery (HS84) | 7.8 | -13.4 |
| Medical Devices | 4.9 | 8 |
| Precious Metals (HS71) | 25.0 | -11.5 |

Source: Swiss Federal Customs Administration FCA





Swiss Business Hub Japan

Export Promotion

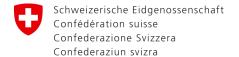
Export Consulting for Swiss SMEs

Investment Promotion

Promotion of Switzerland as a Business Location

Swiss Business Hub Japan (SBHJ)

Commercial Section of the Swiss Embassy in Tokyo Network Partner of Switzerland Global Enterprise (S-GE)



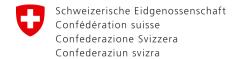




Export Consulting for Swiss SMEs

- Market entry
- Market expansion
- Support against non-tariff trade barriers

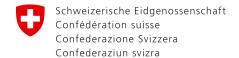
Export Promotion





The Gateway for Business between Switzerland and Japan

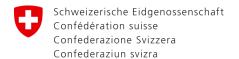
- Research and compilation of information about the Japanese market
- Clarification of business opportunities in relevant industries
- Contacts with trade organizations and public institutions
- Selection of business partners as a result of specialist search
- Organization of visits, trade missions and a wide range of networking events
- Joint promotion projects (such as attendance of trade fairs in SWISS Pavilions)





Service Offering Export Promotion







Export Promotion: Recent Cases

Case I

One of the major Swiss utility providers was looking for ways to open up the rather national and closed Japanese GIS market...

... SBHJ successfully opened doors to Japanese utilities, identified their procurement/decision making procedures and facilitated meetings with potential business partners.

Case II

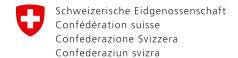
A Swiss industry association wanted to organize for a group of students from Switzerland to visit Japan in order to receive training on site and gain insights into Japanese culture and business practice...

... SBHJ ensured a smooth and successful execution of the entire program by providing a one-stop-shop service package including logistics, visits of companies, trade fairs and academic facilities, and social events.

Case III

A Swiss SME was facing potential unfair competition and discrimination when participating in a call for tender issued by a Japanese public transportation company...

... SBHJ managed to get the Swiss SME back into the tender by re-negotiating with the Japanese company and enabled the development of a strategy for dealing with future tenders in Japan.





References











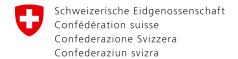








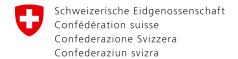






The Team

| Consulting & Management | Consulting ZRH Stefan Barny | Head SBH Japan Roger Zbinden |
|-------------------------|-----------------------------|---------------------------------|
| | Export Promotion | Investment Promotion |
| | Yumiko Kijima (Deputy) | Masaki Teraoka (Chief Rep) |
| | Naoko Wada | Toshihiro Matsuda |
| | Jacqueline Tschumi | Maiko Kanemura |





The Export Promotion Team

Consulting & Management

Consulting ZRH
Stefan Barny

Head SBH Japan Roger Zbinden

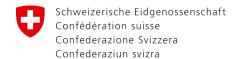
Country Operation

Export Promotion

Yumiko Kijima (Deputy)

Naoko Wada

Jacqueline Tschumi





Thank you for your attention!

Swiss Business Hub Japan

Embassy of Switzerland 5-9-12 Minami Azabu, Minato-ku Tokyo 106-8589

Japan

Tel: +81 3 5449 8400

Fax: +81 3 3473 6090

tok.sbhjapan@eda.admin.ch

www.s-ge.com

Naoko Wada: naoko.wada@eda.admin.ch

Stefan Barny: SBarny@s-ge.com Monica Zurfluh: Mzurfluh@s-ge.com

