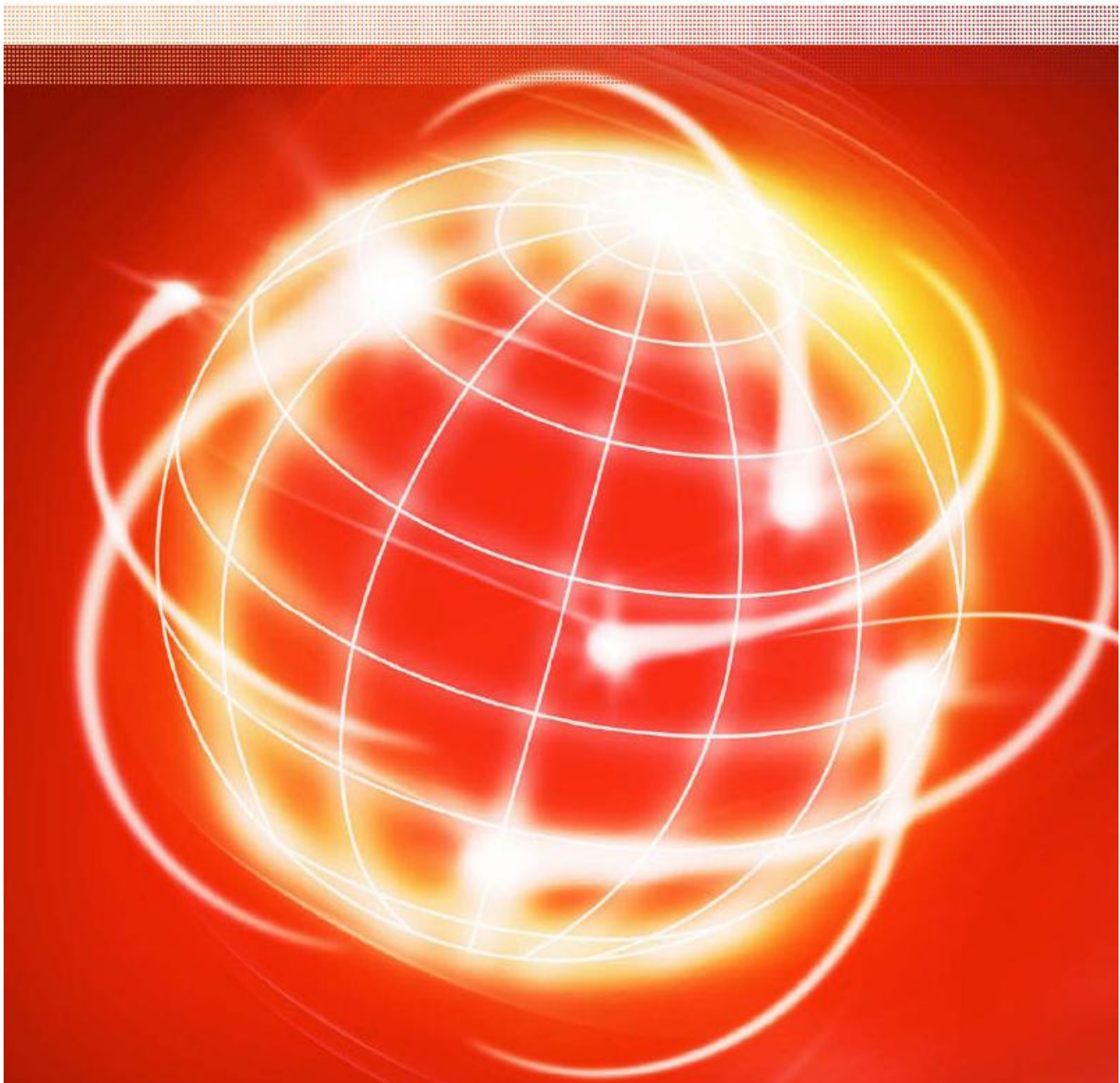


Sumitomo Group Company Report

January 2003 to June 2014



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Introduction

The report examines foreign direct investment (FDI) trends from Sumitomo Group investing between January 2003 and June 2014.

The report includes estimated values on capital investment and the number of jobs created in cases where information was not available at project announcement.

Headline figures	
No of FDI projects	252
Percentage of total projects from company	99.2%
Total jobs created	93,101
Average project size (jobs)	369
Total capital investment	USD 40,566.80 m
Average project size	USD 161.00 m

Company Profile

Name	Sumitomo Group
Headquarters	Kanto, Japan
Website	www.sumitomocorp.co.jp
Turnover	USD 32.00 billion (2013)

Sumitomo Group, together with its subsidiaries, operates as an integrated trading company worldwide. The company operates out of the various segments comprising metal products; transportation and construction; infrastructure; media, network and lifestyle retail; mineral resources, energy, chemical and electronics; general products and real estate; financial and logistics. Sumitomo Group was founded in 1919 and is headquartered in Tokyo, Japan.

Related Companies (Search Specific)

Company Name	Projects	Total Jobs Created	Total Capital Investment (USD m)	Most Recent Project
Sumitomo Group (Parent)	50	21,876	15,269.00	May 2014
Sumitomo Chemical	35	11,096	12,867.10	May 2014
Sumitomo Rubber	23	11,270	2,724.00	Sep 2013
Sumitomo Electric Industries (SEI)	13	11,986	882.40	Oct 2012
Sumitomo Metal Mining	12	5,840	2,975.20	Nov 2011
Sumitomo Electric Wiring Systems	9	5,172	302.90	Feb 2014
Sumitomo Heavy Industries	6	2,863	343.90	Aug 2010
Sumitomo Bakelite	6	484	417.90	Apr 2013
Sumitomo Wiring Systems	3	4,198	59.90	Sep 2008
Sumitomo Forestry	3	1,652	366.70	Sep 2008
Sumitomo Construction Machinery Manufacturing	3	604	68.10	May 2010
Other Subsidiaries	89	16,060	4,289.60	Mar 2014
Total	252	93,101	40,566.70	May 2014

Source: fDi Intelligence from Financial Times Ltd

Contacts

Contact Name	Position	Most recent project
Kimitoshi Umeda	President, Sumitomo Chemical East Africa	May 2014
Steve Hoggan	Director, Manufacturing	Mar 2014
Kuniharu Nakamura	President	Feb 2014
Bick Marshall	Vice President (North America), Sumitomo Electric Wiring Systems	Feb 2014
John Warda	General Manager, Supply Chain & Operations, Emerald Grain	Nov 2013
David Dedman	President, Sumitomo (SHI) Cryogenics of America	Nov 2013
Hiroshi Nomura	Chief Commercial Officer, Boston Biomedical Pharma	Oct 2013
Toshiaki Matsushita	Representative (Argentina), Sumitomo Chemical do Brazil	Sep 2013
John Ferguson	Chief Executive Officer, Howco Group	Sep 2013
Stephan Greif	Chief Executive Officer, Demag Plastics Machinery (Ningbo)	Aug 2013
Toru Nagahata	President (Thailand), Sumitomo Rubber	Apr 2013
Nihei Yasumasa	President, Meiden Technical Center North America	Apr 2013
Gustavo Rodriguez	Operations Director, Sumitomo Drive Technologies	Feb 2013
Koichi Tamura	Representative, Sunovion Pharmaceuticals Asia Pacific	Jan 2013
Tom Howard	General Manager, Philp Brodie Grains	Dec 2012
John Warda	Group General Manager, Supply Chain and Operations, Emerald Group	Oct 2012
Ertugrul Yilmaz	Head (Turkey)	Jul 2012
Masateru Yamato	Director, Sumitomo Corporation Asia	Jul 2012
Pankaj Gulati	Manager, Marketing, Meidensha Coporation	Mar 2012
Takeo Kokubo	President, PT Sumisho E-commerce Indonesia	Feb 2012
Junichi Yamagata	President, Sumitomo Metal Mining do Brasil	Nov 2011
Toshio Suzuki	Representative (Mexico)	Oct 2011
Shigenori Tsuda	President, Taoka Chemical	Sep 2011
Yoshio Tomomasa	General Manager, Inorganic Materials, Sumitomo Chemical	Sep 2011
Ikuji Ikeda	Chief Executive Officer, Sumitomo Rubber Industries	May 2011
Michael Donaldson	Chief Executive Officer, Valent BioSciences	Apr 2011
Susumu Kato	Chief Executive Officer	Feb 2011
Masayoshi Matsumoto	President, Sumitomo Electric Industries	Feb 2011
Ray Nishimoto	Chairman	Oct 2010
Blair Pickerell	Global Chief Marketing Officer	Aug 2010

Source: fDi Intelligence from Financial Times Ltd

Key FDI Trends

Between January 2003 and June 2014 a total of 252 FDI projects were recorded. These projects represent a total capital investment of USD 40.57 billion, which is an average investment of USD 161.00 million per project. During the period, a total of 93,101 jobs were created.

The largest number of projects was announced in 2004, with 31 projects that year. In 2004 was also the year where the average capital investment was at its highest. In terms of job creation, 2006 has seen the highest average project size of 1012 jobs per project.

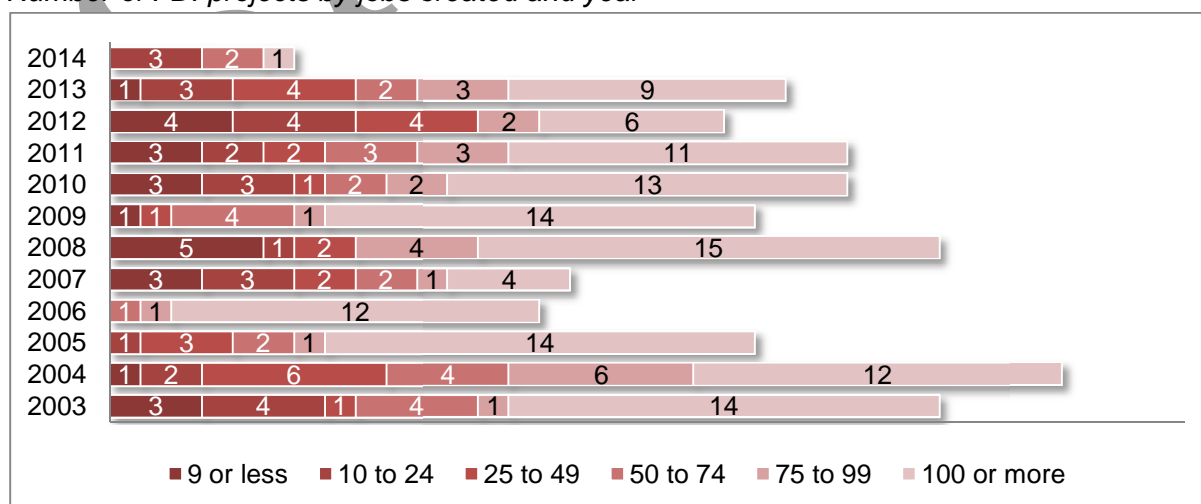
Headline FDI trends by year

Year	Number of projects	% growth per annum	Jobs created		Capital investment	
			Total	Average	Total (USD m)	Average (USD m)
2014	6	n/a	468	78	103.20	17.20
2013	22	10	3,760	170	1,063.80	48.40
2012	20	n/a	5,513	275	1,193.90	59.70
2011	24	n/a	8,455	352	3,236.20	134.80
2010	24	14.3	5,401	225	1,683.10	70.10
2009	21	n/a	5,935	282	5,753.40	274.00
2008	27	80	15,864	587	3,310.40	122.60
2007	15	7.1	6,645	443	3,770.20	251.30
2006	14	n/a	14,170	1,012	3,178.70	227.00
2005	21	n/a	5,821	277	1,840.00	87.60
2004	31	14.8	9,290	299	11,346.30	366.00
2003	27	n/a	11,779	436	4,087.60	151.40
Total	252	n/a	93,101	369	40,566.80	161.00

Source: fDI Markets from The Financial Times Ltd

When allocated into bands, projects creating 100 jobs or more represent the majority of projects, while projects creating between 10 and 24 jobs represent one-tenth of projects.

Number of FDI projects by jobs created and year

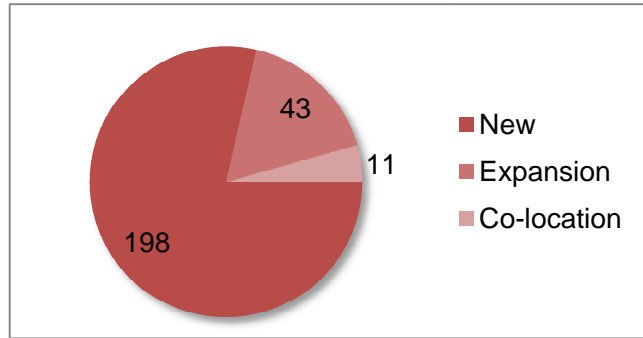


Source: fDI Markets from The Financial Times Ltd

In terms of project type, 78.6% of projects are new investments. New projects have an average capital investment of USD 175.60 million and job creation of 363 per project.

The average capital investment for expansion and co-location is USD 112.50 million and USD 87.30 million respectively. The average number of jobs created in these project types is 336 and 606 respectively.

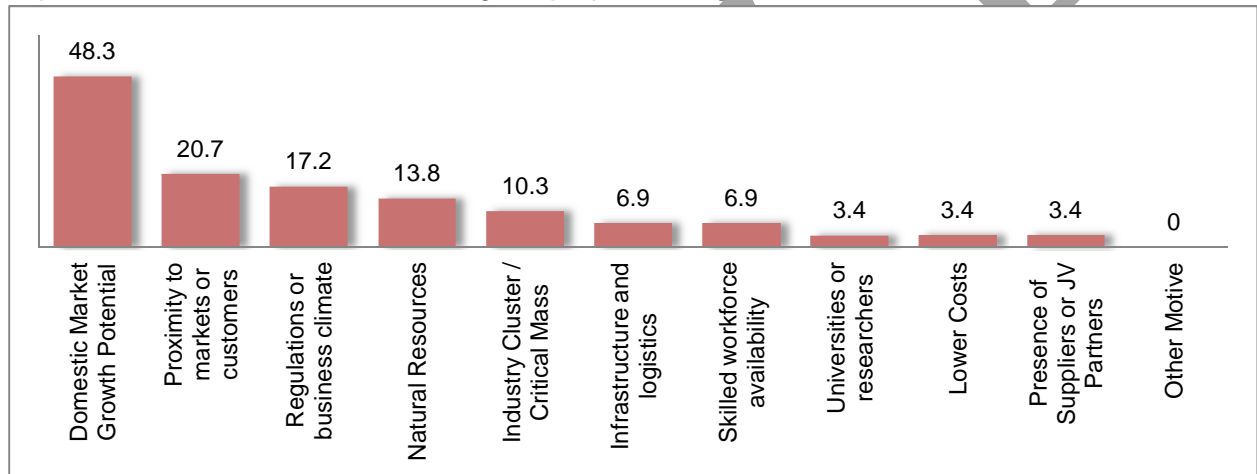
Number of projects by type



Source: fDI Markets from The Financial Times Ltd

The motives for investment were cited by companies for 29 projects. The key reasons for investment were domestic market growth potential, proximity to markets or customers, regulations or business climate, in that order.

Top location determinants: Percentage of projects citing investment motive

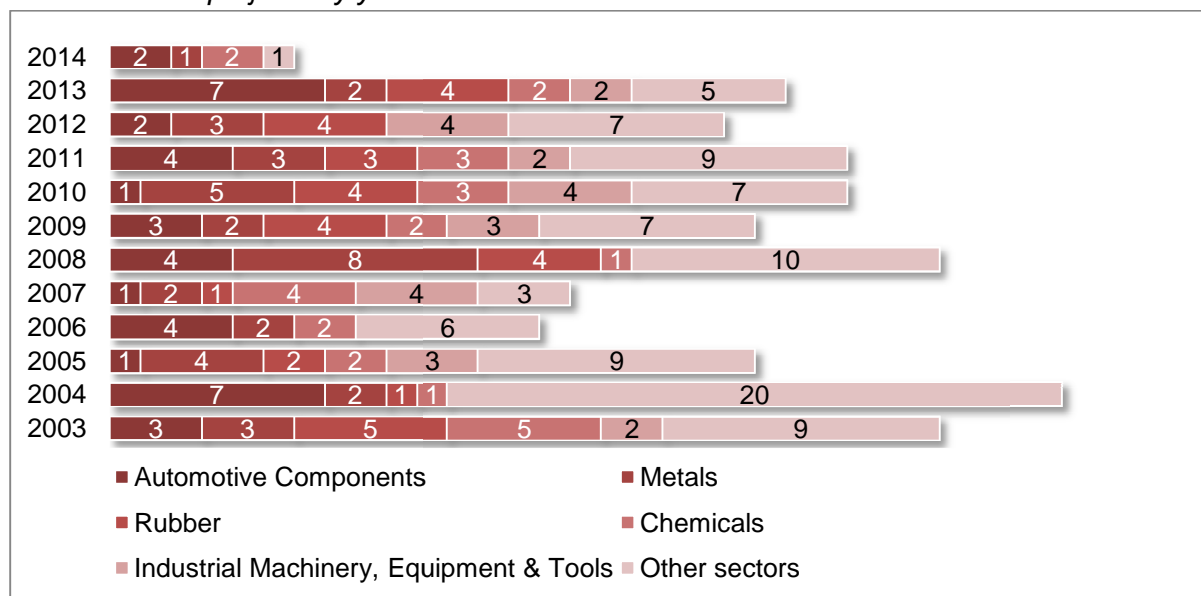


Sample: 29 projects. Source: fDI Markets from The Financial Times Ltd

Industry Analysis: Sectors

Out of a total of 25 sectors, the top five account for the majority of projects. Automotive Components is the top sector accounting for one-sixth of projects tracked. Project volume in this sector peaked in both 2004 and 2013 with seven projects tracked in each of these periods.

Number of FDI projects by year and sector



Source: fDi Markets from The Financial Times Ltd

Automotive Components has generated the highest number of total jobs and has the largest project size, with 751 jobs per project. Coal, Oil and Natural Gas has both the highest total and highest average investment at USD 17.05 billion overall and USD 2.13 billion per project.

FDI trends by sector

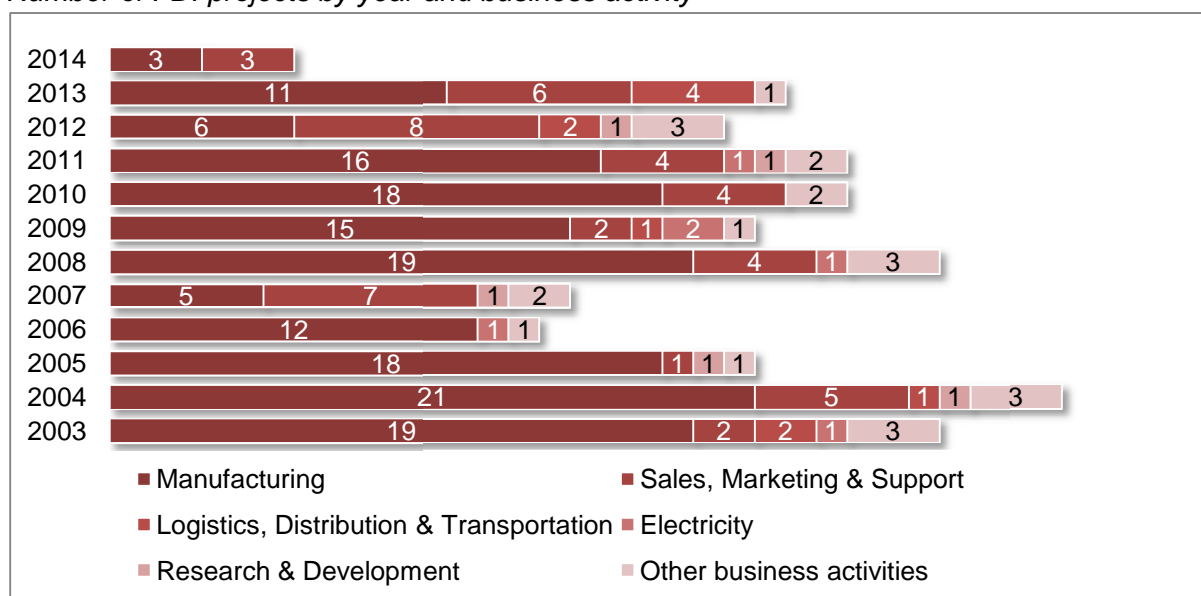
Sector	No of projects	Jobs Created		Capital investment	
		Total	Average	Total (USD m)	Average (USD m)
Automotive Components	39	29,293	751	1,613.80	41.40
Metals	37	14,268	385	10,157.00	274.50
Rubber	32	12,052	376	3,280.20	102.50
Chemicals	27	2,574	95	2,588.80	95.90
Industrial Machinery, Equipment & Tools	24	4,152	173	517.10	21.50
Electronic Components	18	12,177	676	1,456.60	80.90
Plastics	16	1,629	101	477.00	29.80
Coal, Oil and Natural Gas	8	3,493	436	17,050.00	2,131.30
Consumer Products	7	1,102	157	118.70	17.00
Wood Products	7	3,570	510	803.40	114.80
Other sectors	37	8,791	237	2,504.20	67.70
Total	252	93,101	369	40,566.80	161.00

Source: fDi Markets from The Financial Times Ltd

Industry Analysis: Business Activity

Out of a total of 12 business activities, Manufacturing accounts for almost two-thirds of projects. Project volume in this business activity peaked during 2004, with 21 projects tracked.

Number of FDI projects by year and business activity



Source: fDi Markets from The Financial Times Ltd

Manufacturing has generated the highest number of total jobs and greatest investment with a total of 80,544 jobs and USD 27.06 billion investment. Electricity and Construction have the largest project size on average in terms of investment and jobs creation, respectively.

FDI trends by business activity

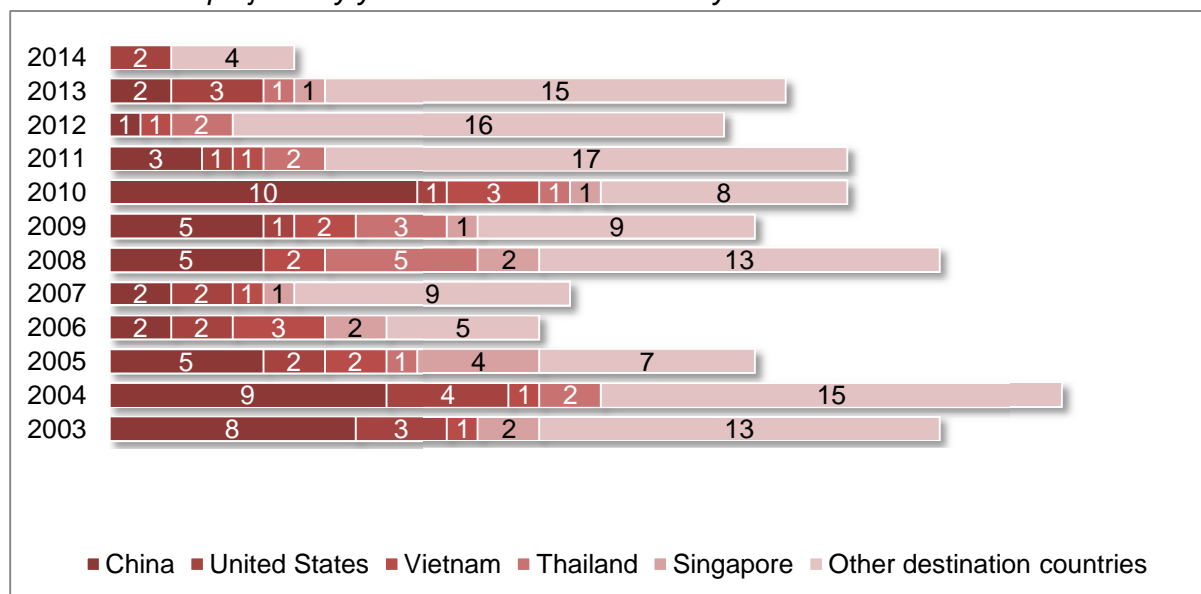
Business activity	No of projects	Jobs Created		Capital investment	
		Total	Average	Total (USD m)	Average (USD m)
Manufacturing	163	80,544	494	27,062.90	166.00
Sales, Marketing & Support	46	1,108	24	266.10	5.80
Logistics, Distribution & Transportation	10	1,298	129	558.70	55.90
Electricity	6	1,046	174	7,004.90	1,167.50
Research & Development	5	388	77	122.60	24.50
Construction	4	4,321	1,080	965.90	241.50
Design, Development & Testing	4	86	21	29.60	7.40
Extraction	4	3,875	968	4,337.00	1,084.30
Headquarters	4	183	45	79.20	19.80
Business Services	3	123	41	117.80	39.30
Other business activities	3	129	43	22.10	7.40
Total	252	93,101	369	40,566.80	161.00

Source: fDi Markets from The Financial Times Ltd

Destination Countries

Out of a total of 46 destination countries, the top five account for almost half of projects. China is the top destination country accounting for more than one-fifth of projects tracked. Project volume in this destination country peaked during 2010, with 10 projects tracked.

Number of FDI projects by year and destination country



Source: fDi Markets from The Financial Times Ltd

Vietnam has received the highest number of total jobs and greatest investment with a total of 17,628 jobs and USD 4.93 billion investment. Philippines and Vietnam have the largest project size on average in terms of investment and jobs creation, respectively.

FDI trends by destination country

Destination country	No of projects	Jobs Created		Capital investment	
		Total	Average	Total (USD m)	Average (USD m)
China	52	12,806	246	2,966.00	57.00
United States	21	2,524	120	1,550.20	73.80
Vietnam	17	17,628	1,036	4,929.70	290.00
Thailand	17	2,168	127	426.30	25.10
Singapore	14	2,314	165	1,516.70	108.30
South Korea	10	7,656	765	1,283.40	128.30
Russia	10	2,413	241	927.70	92.80
Philippines	8	8,269	1,033	3,478.20	434.80
Indonesia	8	3,763	470	1,758.30	219.80
India	7	3,193	456	918.80	131.30
Other destination countries	88	30,367	345	20,811.50	236.50
Total	252	93,101	369	40,566.80	161.00

Source: fDi Markets from The Financial Times Ltd

Destination Cities

Out of a total of 107 destination cities, the top five account for one-eighth of projects. Singapore is the top destination city accounting for 5.6% of projects tracked. Project volume in this destination city peaked during 2005, with four projects tracked.

Pyeongtaek has received the highest number of total jobs, while Seoul has the largest project size with 971 jobs per project on average. Singapore has the highest total investment and New Delhi the highest average at USD 141.60 million per project.

FDI trends by destination city

Destination city	No of projects	Jobs Created		Capital investment	
		Total	Average	Total (USD m)	Average (USD m)
Singapore	14	2,314	165	1,516.70	108.30
Shanghai	6	840	140	122.50	20.40
Dalian	4	612	153	83.80	20.90
Ha Noi	4	1,689	422	459.80	115.00
Rayong	4	1,387	346	195.80	49.00
Yeosu	3	268	89	178.60	59.50
Nantong	3	212	70	70.00	23.30
Pyeongtaek	3	2,362	787	315.20	105.10
Tangshan	3	1,782	594	199.60	66.50
Bangkok	3	19	6	6.60	2.20
Dubai	3	23	7	6.80	2.30
Cambridge (MA)	2	113	56	15.10	7.50
Istanbul	2	64	32	5.80	2.90
Seoul	2	1,943	971	262.40	131.20
Tainan	2	166	83	52.00	26.00
Torun	2	725	362	104.70	52.40
Genk	2	81	40	84.00	42.00
Beijing	2	256	128	145.10	72.50
New Delhi	2	350	175	283.20	141.60
Chennai	2	434	217	82.80	41.40
Other destination cities	96	29,270	304	16,036.60	167.00
Not Specified	88	48,191	547	20,339.80	231.10
Total	252	93,101	369	40,566.80	161.00

Source: fDi Markets from The Financial Times Ltd

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