



# 中国法国工商会 第三季度报告

2023 年 10 月 11 日至 10 月 27 日

## 法国在华企业 商业环境调查



# 在华法国企业持谨慎乐观态度

法国在中国拥有近2100家企业及子公司，雇佣员工约30.7万人。就企业数量而言，法国是欧洲在华的第一大投资国。中国法国工商会拥有1600多名会员企业，自1992年以来一直努力维护这些法国企业的利益。

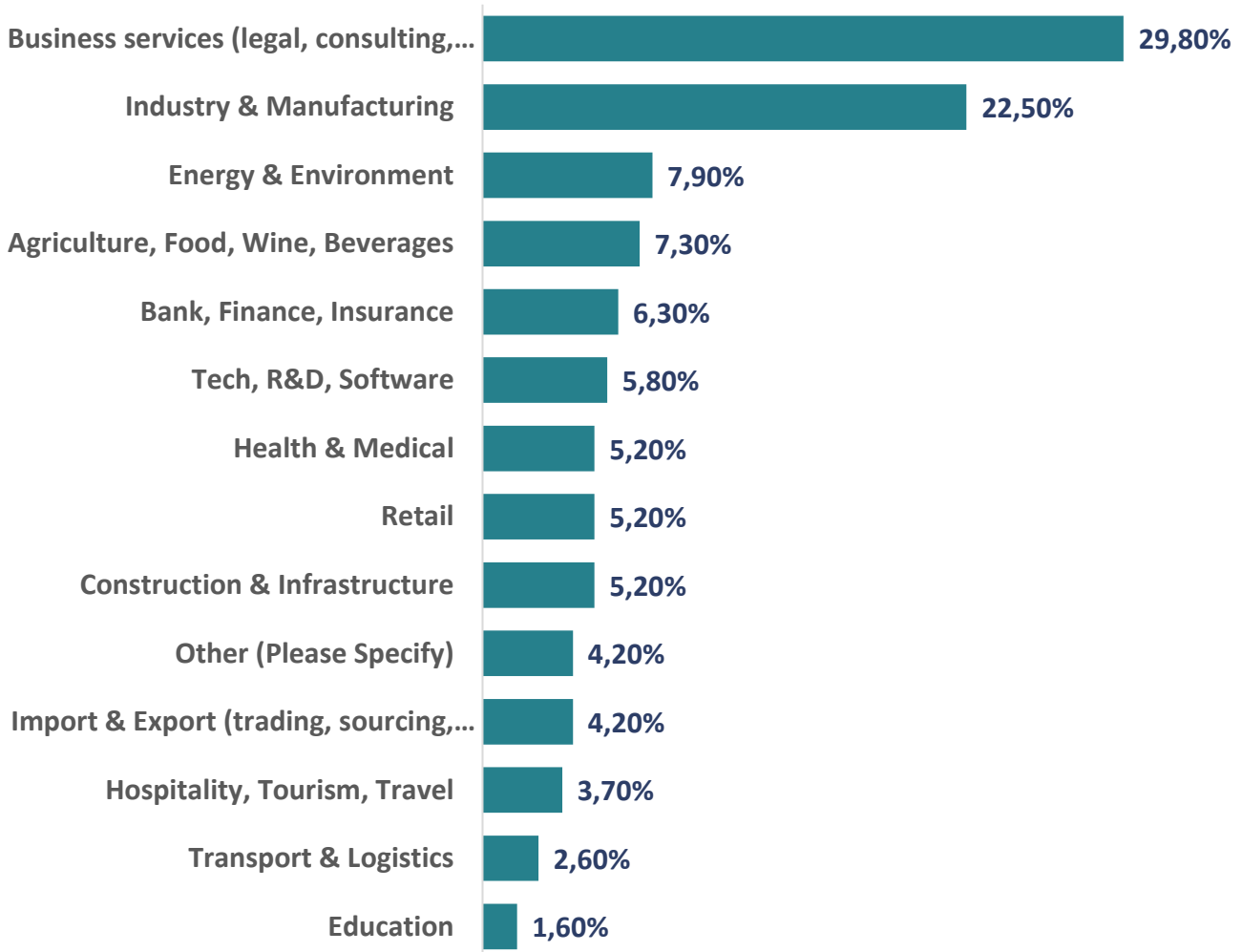
继2022年4月发布的系列调查报告之后，中国法国工商会于2023年10月11日至10月27日再次对其会员进行了问卷调查，以便了解中国重新放开后企业经营活动的状况。304家企业对该问卷调查做出了回应。

- **经济动态:** 63.7%的受访者对中国经济不稳定表示担忧，这表明了商业界普遍存在的不安。1%的受访者认为经济环境非常稳定。
- **监管和地缘政治影响:** 54.1%的受访者认为中国的监管不透明或非常不透明，3.3%的受访者认为中国的监管透明。此外，78%的受访者承认地缘政治紧张局势对他们的业务产生了负面影响。这些结论表明了监管复杂性和地缘政治不确定性为中国营商环境带来的挑战。
- **竞争环境:** 69%的受访者指出竞争加剧主要来源于中国本土民营企业(51%)，部分来自国有企业(29%)，表明营商环境正在发生显著变化。
- **利润趋势:** 第三季度结束时，四分之一的受访者表示利润与2022年相比略有下降(25.7%)，另有四分之一(25.7%)的受访者表示利润保持稳定，还有四分之一(22.5%)的受访者表示利润略有增长。令人鼓舞的是，超过半数的受访企业预计2024年利润会增加，45.5%的企业预计利润会略有上升，9.4%的企业预计利润会大幅增长。这种谨慎的乐观态度预示着来年盈利能力可能出现反弹。
- **战略投资:** 相当数量(44%)的企业计划增加在华投资，只有10%的企业考虑搬迁。大部分投资者的战略重点倾向于采取主动出击的措施(69%)，准备扩大产能，表明了企业积极主动的立场。
- **业务展望:** 超过三分之一的企业预计2023年的业务会增加，将近一半的企业预计2024年的业绩会更好。这一观点与大部分受访者(56.8%)态度一致，他们对所在领域未来三年的中国市场增长前景保持乐观。

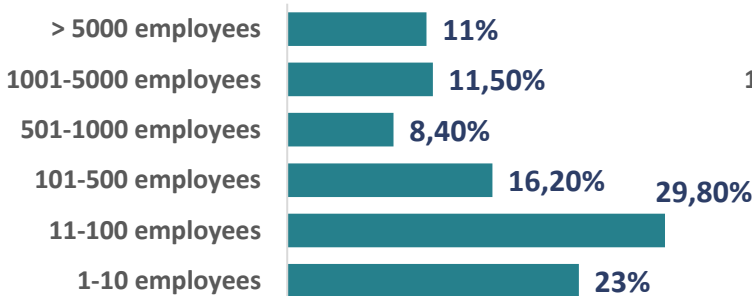
调查显示，法国企业在中国继续面临相当多的挑战，但仍然能察觉到乐观的情绪，企业正在调整战略，以应对不断变化的环境，并抓住经济增长机会。针对这种情况，中国法国工商会及其会员呼吁，应给予外资企业享受平等的财政支持项目的机会，并拥有更为公平的营商环境。

# Profile of respondents

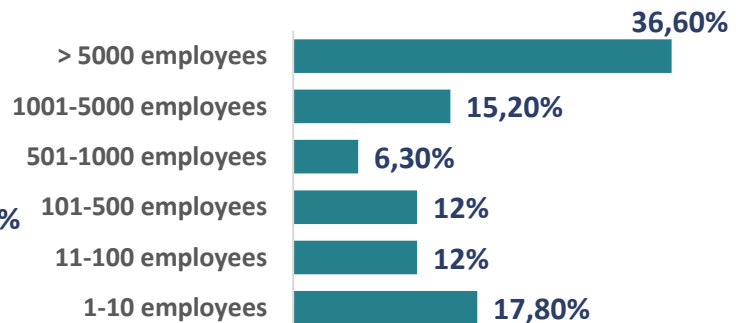
## Your Sector



## Number of employees in China

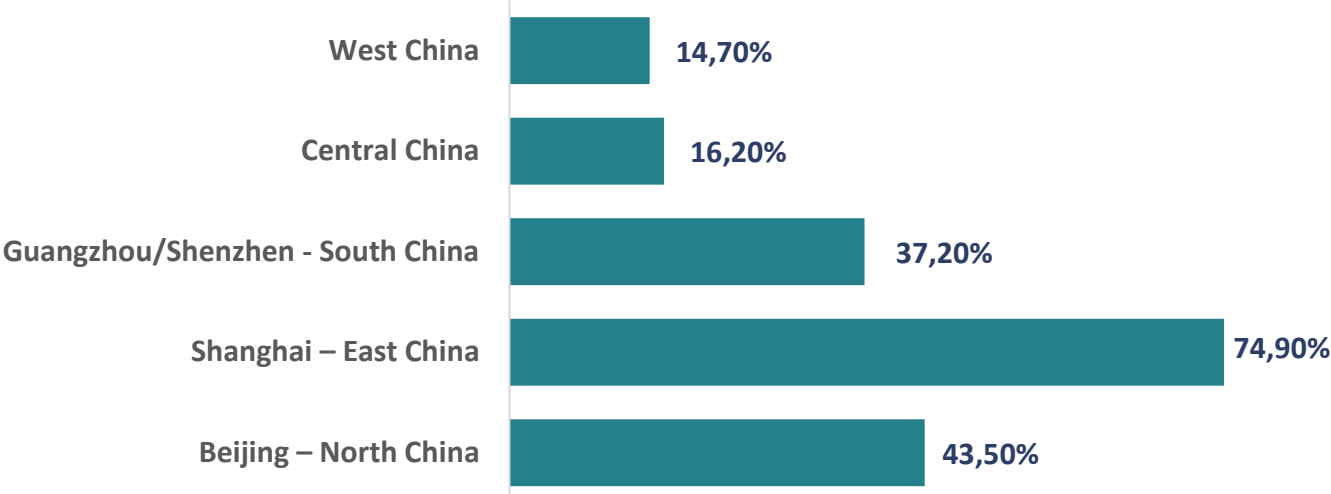


## Number of employees worldwide



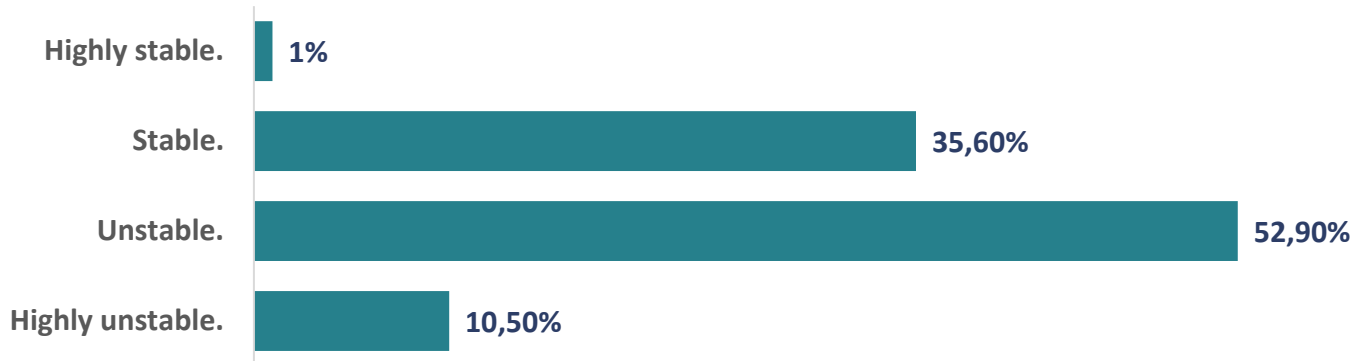
# Profile of respondents

## Your company's location(s)

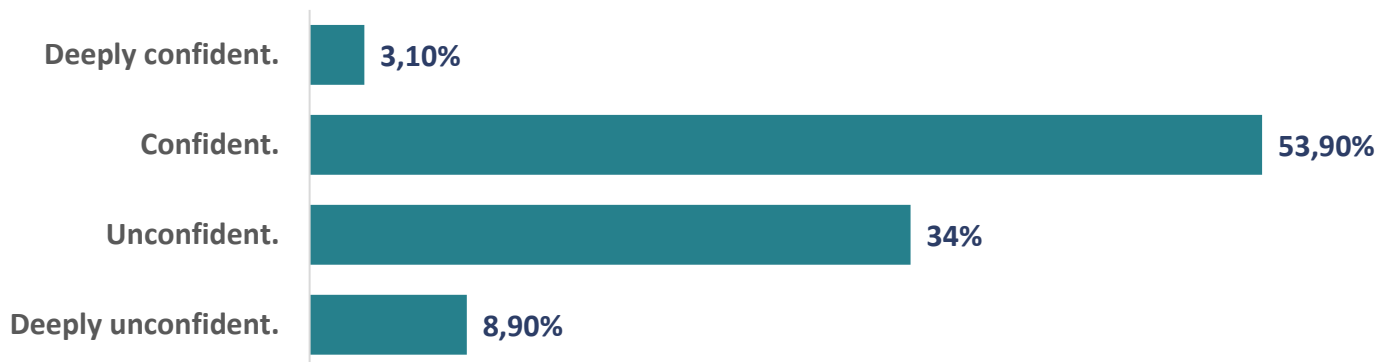


# Business climate

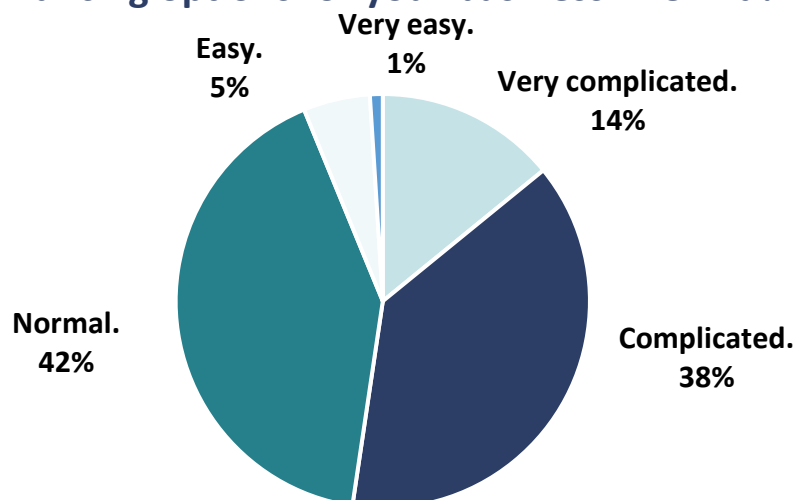
How would you rate the overall economic stability in China to conduct your business?



How confident are you about the growth potential of your sector in the Chinese market over the next 3 years?

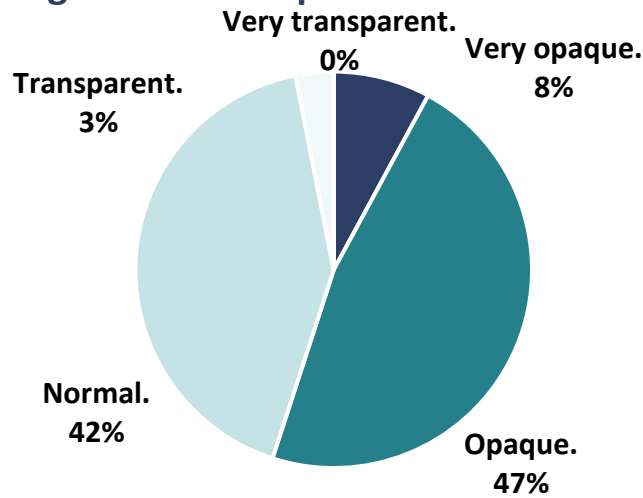


How would you rate the ease of accessing capital and financing options for your business in China?

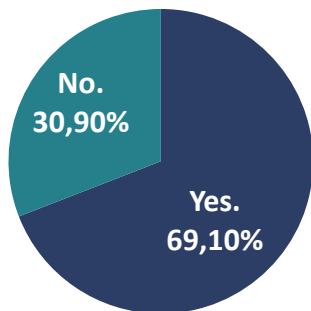


# Business climate

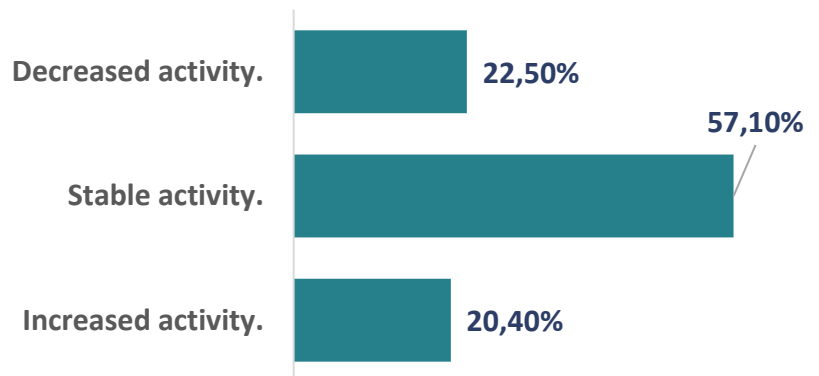
How would you rate the transparency and clarity of business regulations and policies in China?



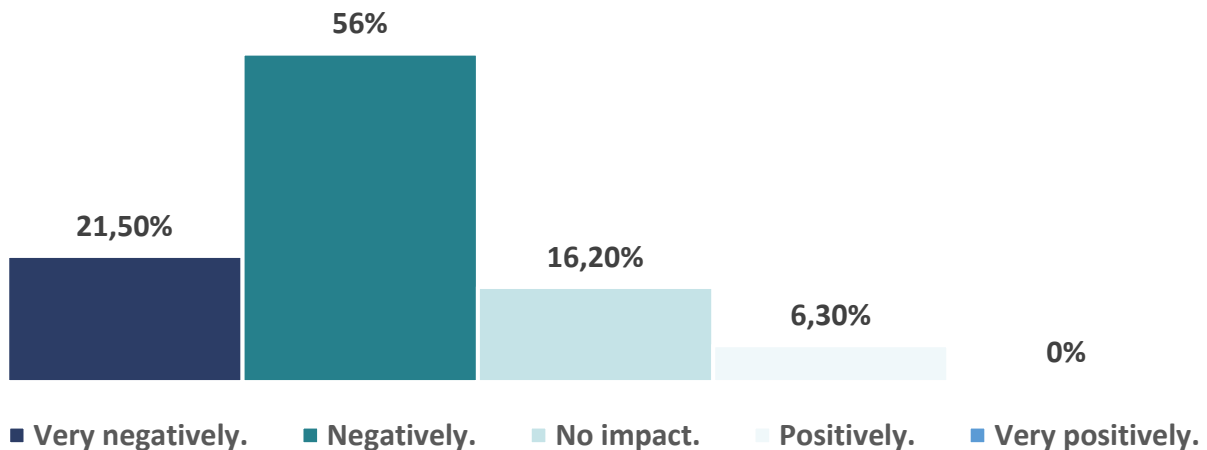
Have you observed any significant changes in the Chinese economy that have directly impacted your sector this year?



How would you assess the evolution of SOEs' activities in your sector?

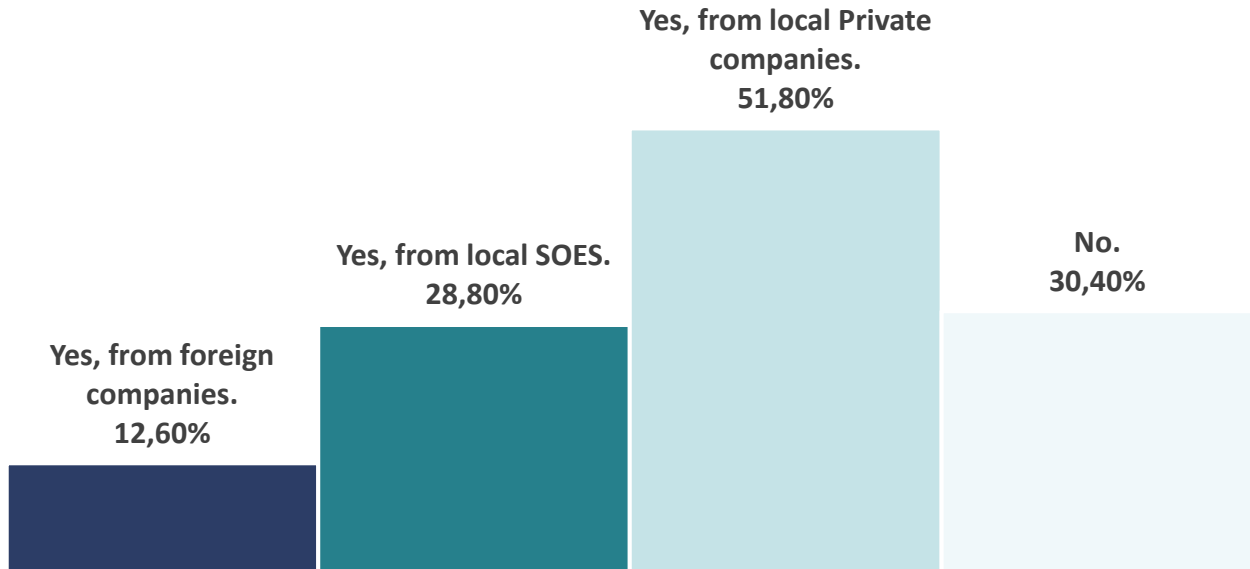


To what extent do you think geopolitical factors and international relations have influenced your sector in China?

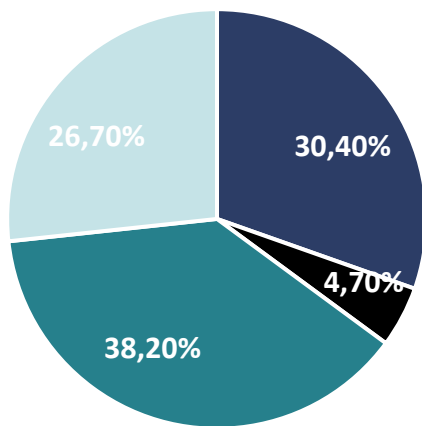


# Business climate

Do you observe over the past year an increase in competition in your sector?

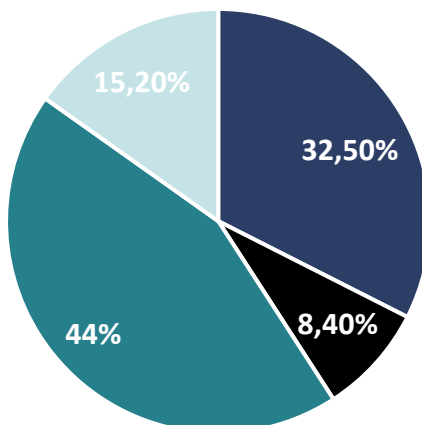


How has the composition of suppliers evolved over the past year?



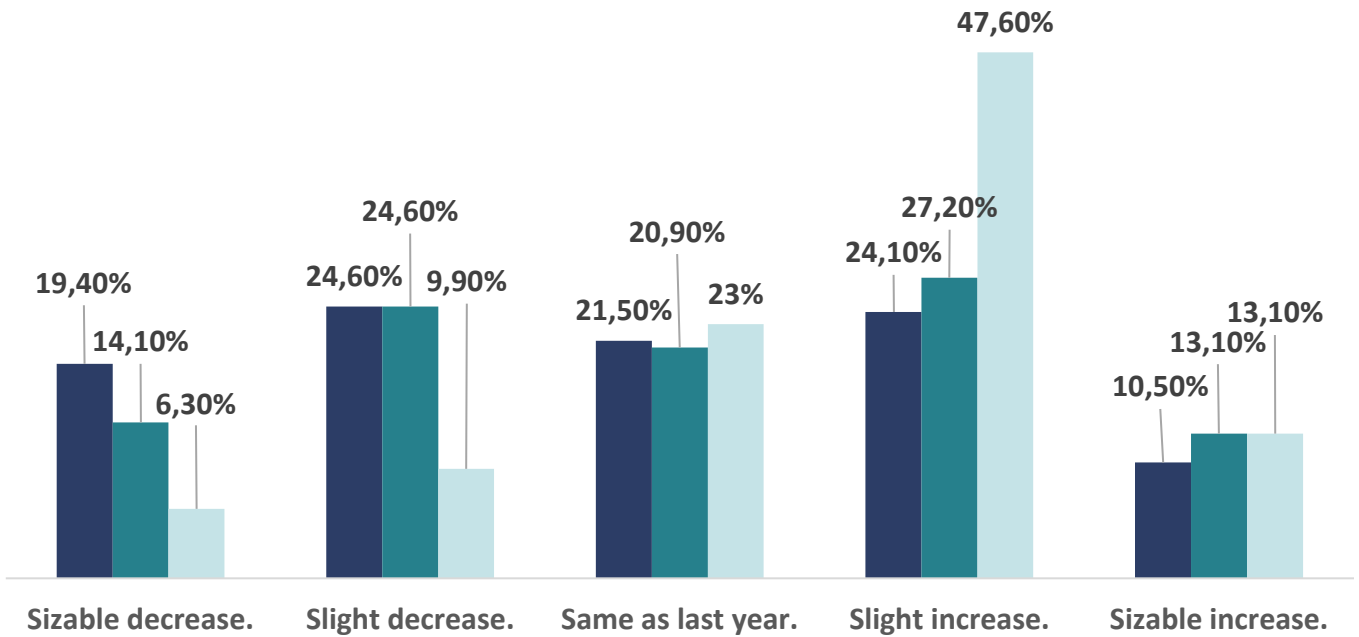
- Increasing share of local companies compared to foreign companies.
- Decreasing share of local companies compared to foreign companies.
- No change observed.
- Not Applicable.

How has the composition of your clients' base evolved over the past year?



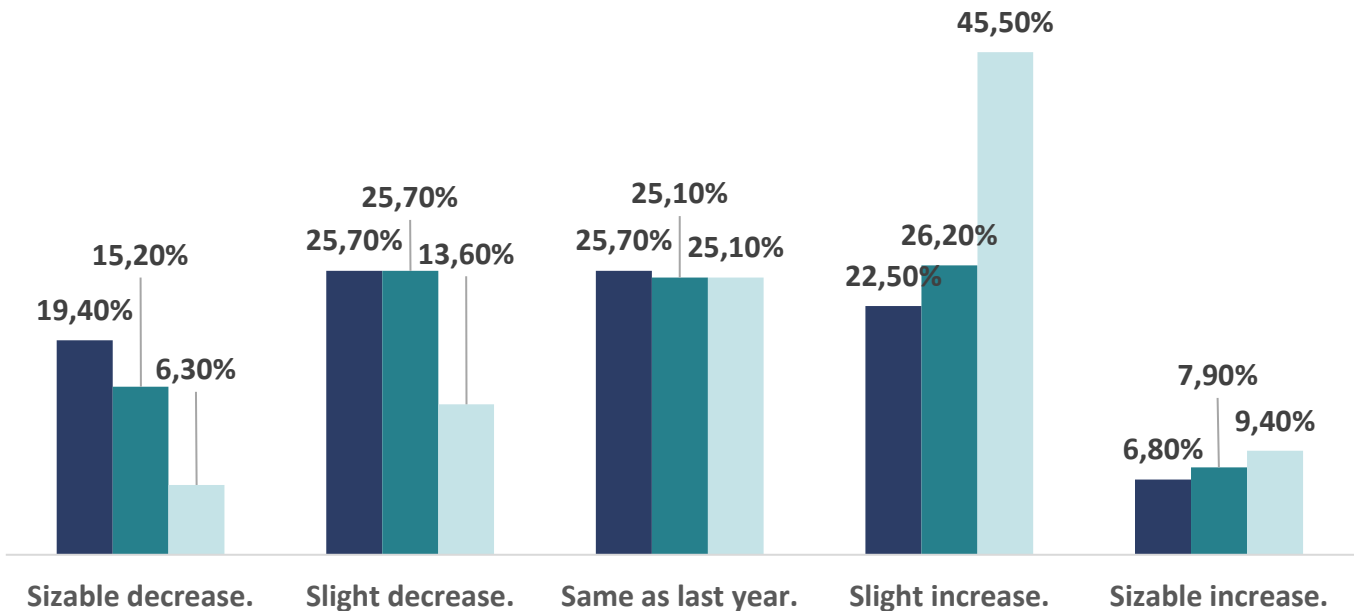
- Increasing share of local companies compared to foreign companies.
- Decreasing share of local companies compared to foreign companies.
- No change observed.
- Not Applicable.

# Turnover



- While Q3 is coming to an end, how does your turnover compare with 2022?
- Which level of turnover are you expecting to achieve in 2023, compared to 2022?
- Looking ahead, which level of turnover are you forecasting in 2024, compared to 2023?

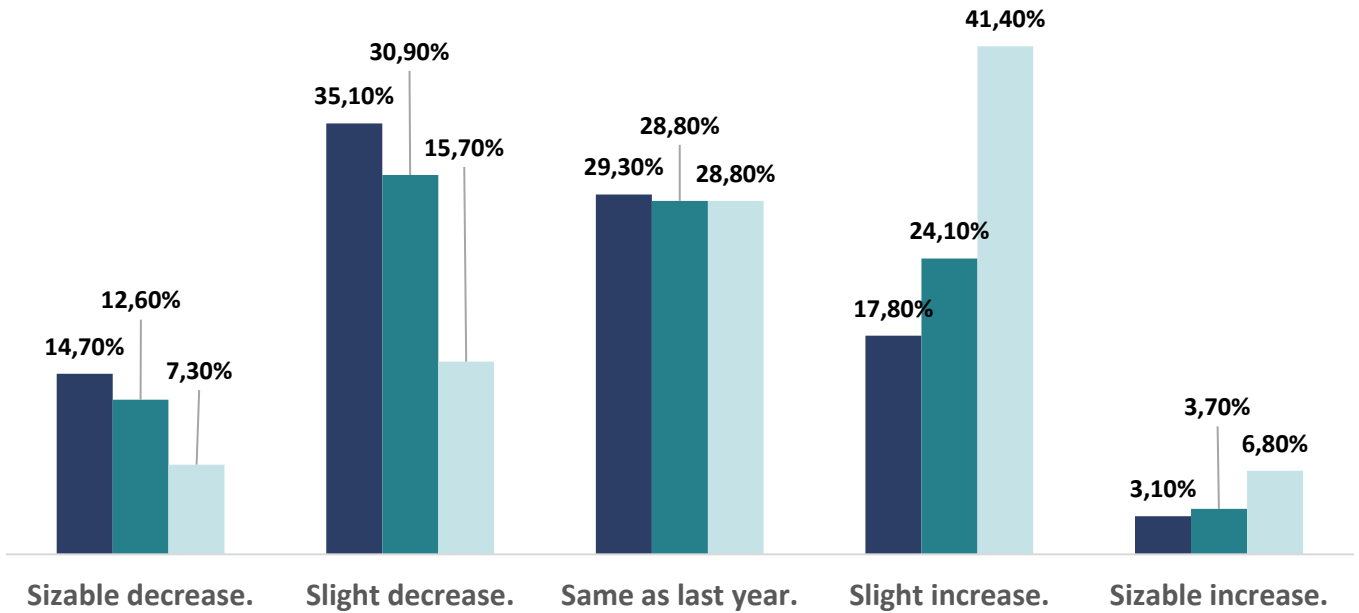
# Profits



- While Q3 is coming to an end, how does your profits compare with 2022?
- Which level of profits are you expecting to achieve in 2023, compared to 2022?
- Looking ahead, which level of profits are you forecasting in 2024, compared to 2023?



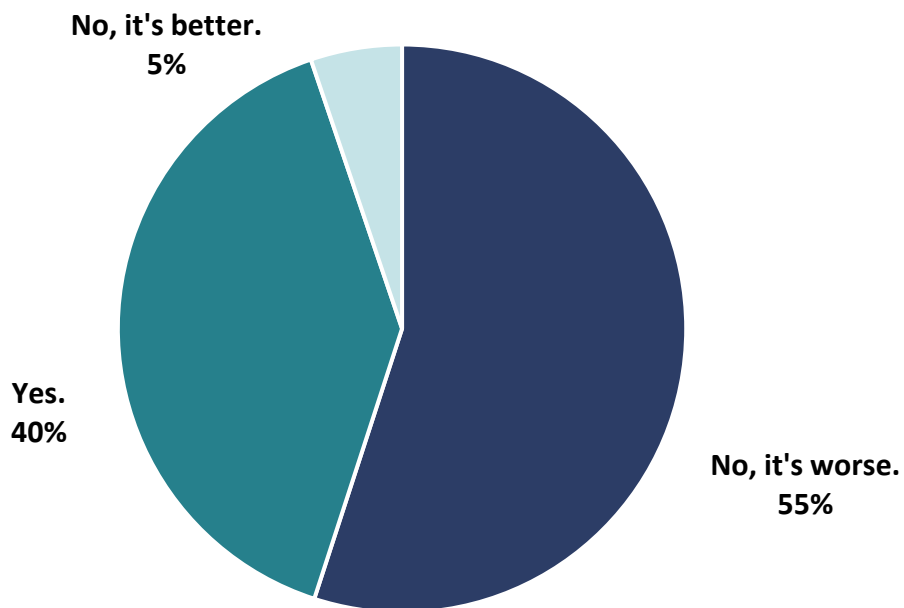
# Margins



- While Q3 is coming to an end, how does your margin compare with 2022?
- Which level of margin are you expecting to achieve in 2023, compared to 2022?
- Looking ahead, which level of margin are you forecasting in 2024, compared to 2023?

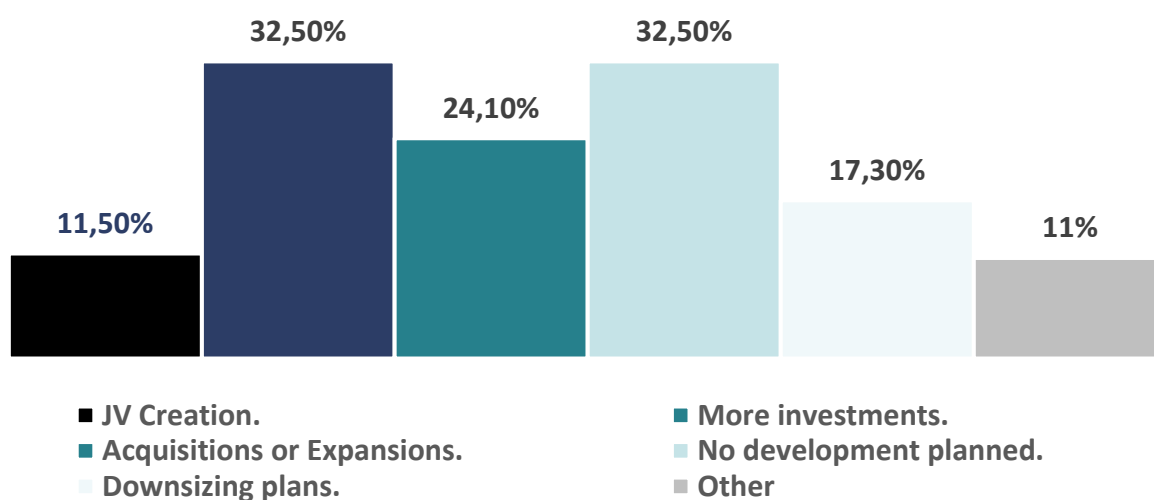
# Projections

Are these results in line with your projections?

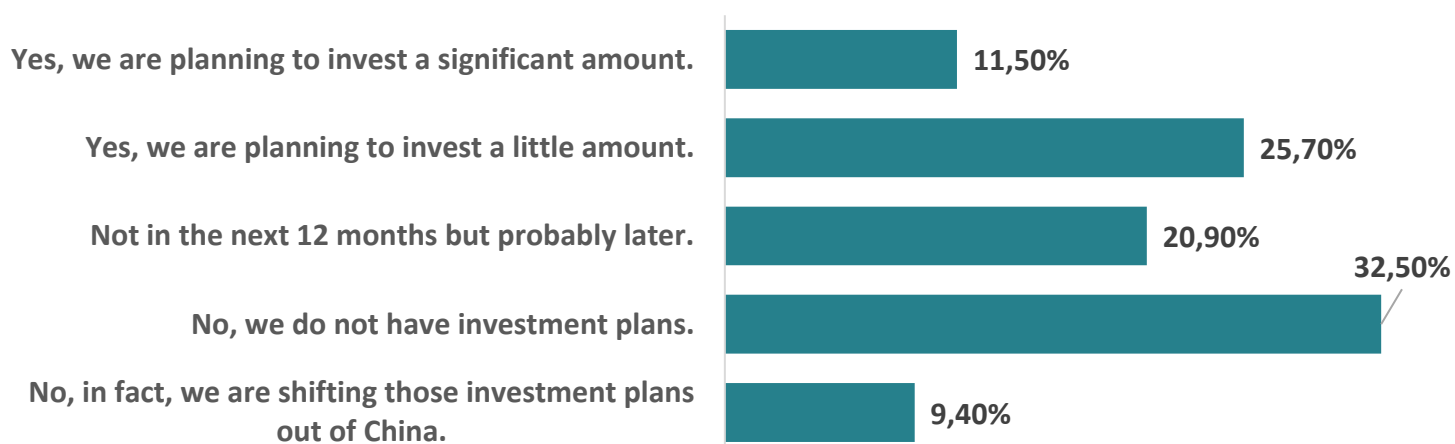


# Plans & Investments

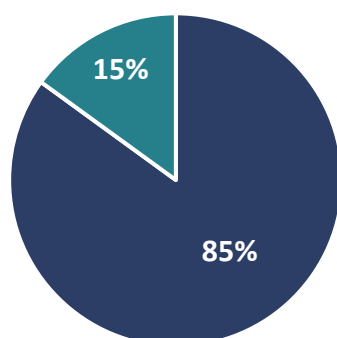
In the next 3 years how do you plan to develop your activity?



Is your company planning to further invest capital in China?



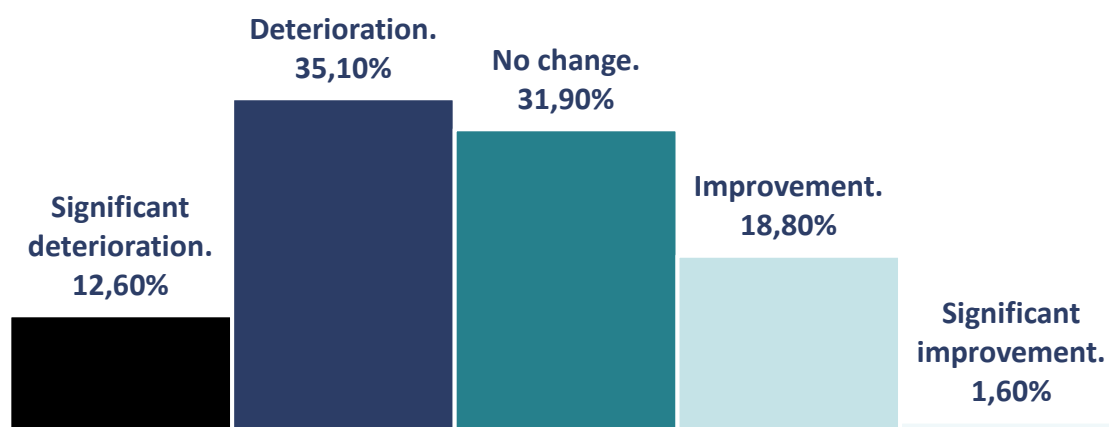
If you answered yes to the previous question, what is the main driver behind your decision to invest more in China?



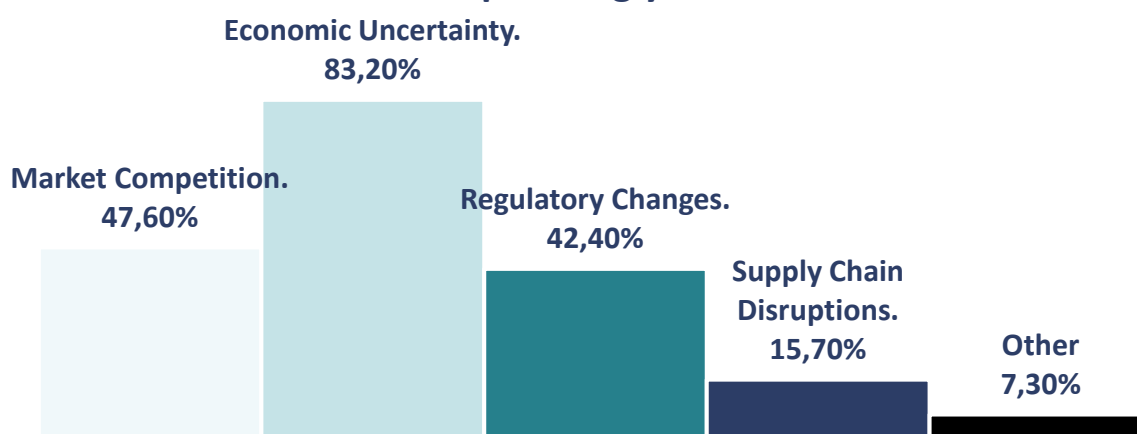
- “Offensive measure” i.e. : capacity to increase business, market share, revenues, etc.
- “Defensive measures” i.e. : investment necessary to maintain business revenues/profit, complying with Chinese regulations, etc.

# Long-term forecast

How has your company's perception toward China evolved since the lifting of the restrictions?



What potential challenges or risks do you foresee for the company in the upcoming years?



**OPEN QUESTION: Are there any specific regulatory reforms or improvements you believe would enhance the business environment in China?**

- Facilitate access to capital and simplify visa processes
- Actively work on enhancing China's global image to attract more foreign investments
- Change business license policies to provide greater opportunities for foreign architectural firms
- Relax restrictions on the import of medical devices
- Simplifying data transfer processes and ensuring equal treatment for foreign law firms.

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## October 2023 - Business Confidence Survey

Thank you

