



**LAPORAN AKHIR BANCI EKONOMI
BAGI PERUSAHAAN/PERNIAGAAN**
*FINAL REPORT OF THE ECONOMIC CENSUS
OF BUSINESS ENTERPRISES*
NEGARA BRUNEI DARUSSALAM
2011

JABATAN PERANGKAAAN
JABATAN PERANCANGAN DAN KEMAJUAN EKONOMI
JABATAN PERDANA MENTERI
NEGARA BRUNEI DARUSSALAM

DEPARTMENT OF STATISTICS
DEPARTMENT OF ECONOMIC PLANNING AND DEVELOPMENT
PRIME MINISTER'S OFFICE
BRUNEI DARUSSALAM

KATA PENGANTAR

Kerajaan Kebawah Duli Yang Maha Mulia Paduka Seri Baginda Sultan dan Yang Di-Pertuan Negara Brunei Darussalam melalui Jabatan Perancangan dan Kemajuan Ekonomi (JPKE), Jabatan Perdana Menteri, telah mengendalikan Banci Ekonomi 2011 yang meliputi semua perusahaan/perniagaan yang berdaftar di negara ini.

Laporan ini memaparkan data-data akhir dari Banci Ekonomi 2013 ini dengan memberikan data-data penting mengenai bilangan perusahaan/perniagaan, bilangan pekerja, bayaran kepada pekerja, pendapatan dan perbelanjaan operasi dan nilai tambah kasar mengikut jenis kegiatan ekonomi.

Data-data yang dihasilkan dari banci ini akan digunakan sebagai asas baru dalam penyediaan perangkaan akaun Negara, terutama sekali bagi anggaran keluaran dalam negeri kasar (KDNK).

Saya sukacita merakamkan setinggi-tinggi penghargaan kepada semua pemilik dan pengurus syarikat-syarikat perusahaan/perniagaan di negara ini yang telah memberikan kerjasama dalam memberikan maklumat-maklumat yang dikehendaki.

Saya yakin kejayaan Banci Ekonomi 2011 ini dan hasil yang diperolehi daripadanya akan dapat memberikan perangkaan asas yang amat berguna bagi perancangan sosio-ekonomi negara dan keperluan pengguna-pengguna lain bagi pelbagai tujuan masing-masing.

DR HJH MAY FA'EZAH BINTI HJ AHMAD ARIFFIN

Ketua Pengarah

Jabatan Perancangan dan Kemajuan Ekonomi

Jabatan Perdana Menteri

Negara Brunei Darussalam.

Disember 2013

FOREWORD

The Government of His Majesty The Sultan and Yang Di-Pertuan of Brunei Darussalam through the Department of Economic Planning and Development (JPKE), Prime Minister's Office, has conducted the 2011 Economic Census covering all registered businesses in the country.

This report presents the final results of the 2011 Economic Census and contains key data on the number of businesses, number of employees, compensation of employees, operating revenue and expenditure as well as gross value added of businesses by type of economic activity.

The data from the census will be used as a new benchmark for the compilation of the national accounts, especially in the estimation of the Gross Domestic Product (GDP).

I would like to record my great appreciation to all proprietors and managers of businesses in the country who had given their co-operation in providing the required information.

I trust that the successful completion of this census and the subsequent results produced will provide vital information for the use of socio-economic planning of the country and various needs of other users.

DR HJH MAY FA'EZAH BINTI HJ AHMAD ARIFFIN

Director General

Department of Economic Planning and Development

Prime Minister's Office

Brunei Darussalam.

December 2013

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Ringkasan Eksekutif
Executive Summary

RINGKASAN EKSEKUTIF

Pendahuluan

Jabatan Perancangan dan Kemajuan Ekonomi (JPKE) telah mengendalikan Banci Ekonomi 2011 bermula pada bulan Disember 2011. Banci Ekonomi 2011 mengumpul maklumat berkenaan dengan aktiviti perniagaan yang dijalankan perusahaan berkenaan bagi tahun rujukan 2010. Objektif utama banci ini diadakan ialah:

1. Untuk mengumpulkan maklumat yang lengkap dan terkini mengenai kegiatan ekonomi yang dijalankan oleh perusahaan/perniagaan di negara ini untuk mengukur tahap semasa kegiatan ekonomi dan juga perubahan di dalam struktur perusahaan/perniagaan sektor swasta di peringkat kebangsaan.
2. Untuk menjadi salah satu asas utama bagi penyusunan perangkaan akaun negara.

Profil Perniagaan Sektor Swasta

Hasil terakhir Banci Ekonomi 2011 menunjukkan bahawa perusahaan kecil dan sederhana (PKS) merupakan 97.5 peratus dari jumlah bilangan perusahaan/perniagaan yang aktif di Negara Brunei Darussalam pada tahun 2010. Hampir dua pertiga (65.1 peratus atau 3,623 perusahaan) dari jumlah perusahaan adalah terdiri dari perusahaan kecil. Sebanyak 1,804 perusahaan sederhana menyumbang 32.4 peratus, manakala baki 139 perusahaan (2.5 peratus) merupakan perusahaan besar.

Dari segi jenis kegiatan ekonomi, Perdagangan Borong dan Runcit mempunyai bilangan perusahaan terbesar sebanyak 1,907 perusahaan, menyumbang 34.3 peratus kepada jumlah keseluruhan perusahaan. Ini diikuti oleh Pembuatan dengan 695 perusahaan (12.5 peratus) dan Pembinaan 691 perusahaan (12.4 peratus).

Jumlah pekerjaan di sektor swasta pada tahun 2010 adalah sebanyak 99,607 orang pekerja, terdiri daripada 68,688 (69.0 peratus) pekerja lelaki dan 30,919 (31.0 peratus) pekerja perempuan. Perusahaan kecil mengambil bekerja sebanyak 14.7 peratus (14,680 pekerja) daripada jumlah keseluruhan tenaga kerja di sektor swasta. Sementara itu, perusahaan sederhana dan besar masing-masing mengambil bekerja 44,499 pekerja (44.7 peratus) dan 40,428 pekerja (40.6 peratus).

Pekerja tempatan (rakyat Brunei dan penduduk tetap) merupakan 42.7 peratus (42,518 pekerja) daripada jumlah keseluruhan tenaga kerja sektor swasta, berbanding dengan 57.3 peratus (57,089 pekerja) bagi pekerja asing.

Perdagangan Borong dan Runcit dan Pembinaan merupakan perusahaan yang terbesar memberikan peluang pekerjaan di sektor swasta, dengan kedua-duanya menyumbang 22.8 peratus kepada jumlah keseluruhan pekerjaan. Ini diikuti oleh Perkhidmatan Profesional, Teknikal, Pentadbiran dan Sokongan sebanyak 11.3 peratus. Perdagangan Borong dan Runcit adalah majikan terbesar membukakan peluang pekerjaan kepada bagi pekerja tempatan, manakala Pembinaan adalah majikan terbesar bagi pekerja asing.

Pada tahun 2010, jumlah pampasan yang dibayar kepada pekerja di sektor swasta bernilai kira-kira BND 2.1 bilion. Sebanyak 84.4 peratus (BND 1.7 bilion) telah dibelanjakan untuk gaji bulanan pekerja dan juga bonus tahunan. Selebihnya adalah bagi pembayaran kemudahan lain seperti perumahan dan perbelanjaan perubatan, dan juga sumbangan majikan kepada Tabung Amanah Pekerja (TAP) dan Skim Persaraan Caruman Tambahan (SCP) untuk pekerja tempatan.

Prestasi Perusahaan Sektor Swasta

Perniagaan sektor swasta menjana hasil operasi sebanyak BND 29.2 bilion pada tahun 2010. Aktiviti Perlombongan dan Kuari aktiviti merupakan penyumbang tertinggi dengan BND 12.6 bilion (43.1 peratus), diikuti oleh Pembuatan dengan BND 6.5 bilion (22.2 peratus) dan Perdagangan Borong dan Runcit dengan BND 4.6 bilion (15.8 peratus).

Jumlah nilai keluaran kasar yang dihasilkan oleh perniagaan sektor swasta pada tahun 2010 berjumlah BND 26.3 bilion. Hampir separuh daripada jumlah keluaran kasar disumbangkan oleh aktiviti Perlombongan dan Kuari (47.4 peratus atau BND 12.5 bilion), diikuti oleh Pembuatan 24.6 peratus (BND 6.5 bilion) dan Pembinaan 7.4 peratus (BND 1.9 bilion).

Dari segi nilai tambah, sektor swasta telah menghasilkan sejumlah BND 15.5 bilion pada tahun 2010. Perlombongan dan Kuari merupakan penyumbang utama dengan 61.6 peratus (BND 9.6 bilion), diikuti oleh Pembuatan dengan 18.0 peratus (BND 2.8 bilion) dan Perdagangan Borong dan Runcit 5.1 peratus (BND 0.8 bilion).

Mengikut saiz perusahaan, perusahaan besar menyumbang 84.4 peratus (BND 13.1 bilion) daripada jumlah nilai tambah kasar. Perusahaan sederhana menyumbang sebanyak 11.8 peratus (BND 1.8 bilion), diikuti oleh perusahaan kecil dengan 3.8 peratus (BND 0.6 bilion).

EXECUTIVE SUMMARY

Introduction

The Department of Economic Planning and Development (JPKE) conducted the Economic Census 2011 starting in December 2011. The census collected information relating to the economic activities undertaken by businesses in the country during the reference year 2010. The main objectives of this census were:

1. To collect complete and up-to-date information relating to the economic activities undertaken by businesses in this country in order to measure the current levels of economic activity and changes in the structure of the commercial and industrial sectors at the national levels.
2. To serve as one of the main data base for the compilation of national accounts for the country.

Profile of the Private Sector Businesses

The final results of the Economic Census 2011 indicated that small and medium enterprises (SMEs) made up 97.5 per cent of the total number of active enterprises in Brunei Darussalam in 2010. Almost two-thirds (65.1 per cent or 3,623 enterprises) of the total enterprises were small. The 1,804 medium enterprises accounted for 32.4 per cent, while the remaining 139 enterprises (2.5 per cent) were large enterprises.

By the different types of economic activities, the Wholesale and Retail Trade had the largest number of enterprises with 1,907 enterprises, accounting for 34.3 per cent. This was followed by Manufacturing with 695 enterprises (12.5 per cent) and Construction 691 enterprises (12.4 per cent).

The total employment in the private sector in 2010 was 99,607 persons, comprising 68,688 (69.0 per cent) male workers and 30,919 (31.0 per cent) female workers. The small enterprises employed only 14.7 per cent (14,680 workers) of the total private sector workforce. The medium and large enterprises, meanwhile employed 44,499 (44.7 per cent) and 40,428 workers (40.6 per cent) respectively.

Local workers (Brunei citizens and permanent residents) accounted for 42.7 per cent (42,518 workers) of the private sector workforce, compared to 57.3 per cent (57,089 workers) for the non-local workers.

Wholesale and Retail Trade and Construction provided the highest number of job opportunities in the private sector, with each contributing 22.8 per cent to the overall total employment. This was followed by the Professional, Technical, Administrative and Support Services Activities at 11.3 per cent. Wholesale and Retail Trade was the largest employer of local workers, while Construction was the largest employer of non-local workers.

In 2010, the total compensation paid to employees in the private sector amounted to about BND 2.1 billion. About 84.4 per cent (BND 1.7 billion) was spent on the monthly salaries and wages of employees as well as annual bonuses. The rest was for payment of other benefits such as housing and medical expenses and also included the employers' contribution to the Employees' Trust Fund and the Supplemental Contributory Pension (SCP) for their local employees.

Performance of the Private Sector Businesses

The private sector businesses generated total operating revenue of BND 29.2 billion in 2010. The Mining and Quarrying activity was the top earner with BND 12.6 billion (43.1 per cent), followed by Manufacturing with BND 6.5 billion (22.2 per cent) and Wholesale and Retail Trade with BND 4.6 billion (15.8 per cent).

The total value of gross output produced amounted to BND 26.3 billion. Nearly half of the total gross output was contributed by the Mining and Quarrying activity (47.4 per cent or BND 12.5 billion), followed by Manufacturing at 24.6 per cent (BND 6.5 billion) and Construction 7.4 per cent (BND 1.9 billion)

In terms of gross value added, the private sector generated a total of BND 15.5 billion in 2010. The Mining and Quarrying activity contributed the largest share of 61.6 per cent (BND 9.6 billion), followed by Manufacturing at 18.0 per cent (BND 2.8 billion) and Wholesale and Retail Trade 5.1 per cent (BND 0.8 billion).

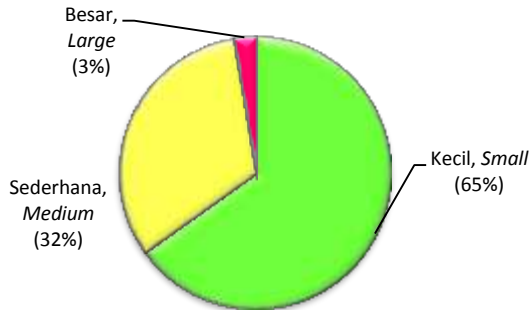
By business size, large enterprises contributed 84.4 per cent (BND 13.1 billion) of the total gross value added. The medium enterprises had a share of 11.8 per cent (BND 1.8 billion), followed by small enterprises with 3.8 per cent (BND 0.6 billion).

STRUKTUR PERUSAHAAN/PERNIAGAAN SEKTOR SWASTA

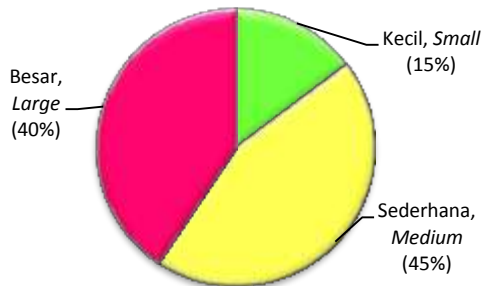
STRUCTURE OF PRIVATE SECTOR BUSINESSES

Mengikut Saiz By Size

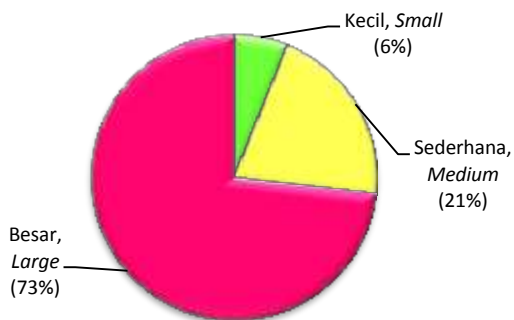
Bilangan Perusahaan / No. of Enterprises



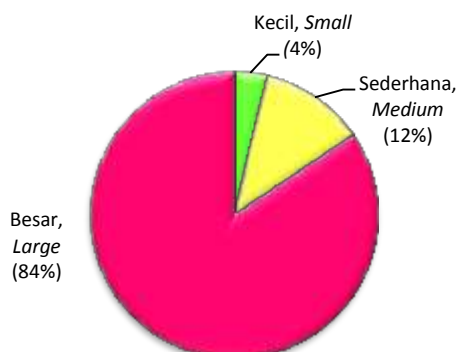
Pekerjaan / Employment



Hasil Operasi / Operating Revenue

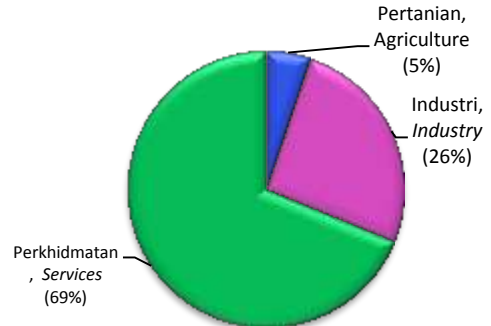


Nilai Tambah Kasar / Gross Value Added

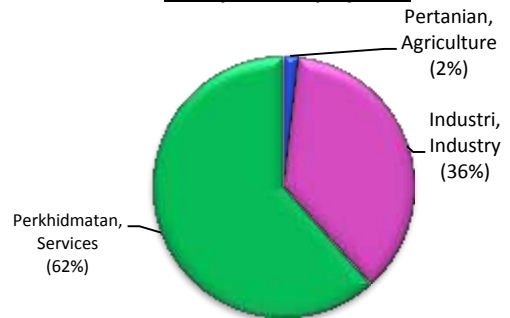


Mengikut Sektor By Sector

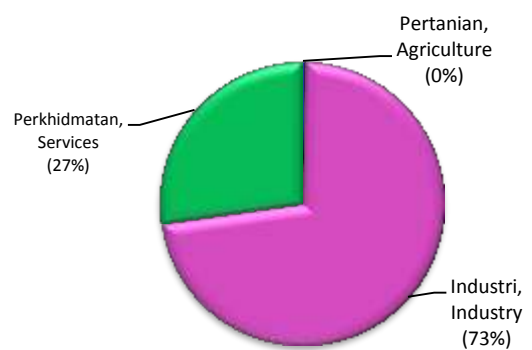
Bilangan Perusahaan / No. of Enterprises



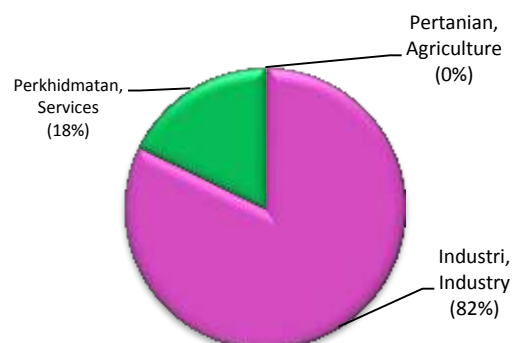
Pekerjaan / Employment



Hasil Operasi / Operating Revenue



Nilai Tambah Kasar / Gross Value Added



PROFIL DAN PRESTASI SEKTOR SWASTA
PROFILE AND PERFORMANCE OF PRIVATE SECTOR

Aktiviti Activity	Bilangan Perusahaan No. of Enterprises	Pekerjaan Employment			Saiz Purata Setiap Perusahaan Average Size per Enterprise	Purata Bayaran Pekerja Average Compensation
		Jumlah Pekerja Total Employments	Tempatan Locals	Asing Non-Locals		
	Bilangan Number					Nilai (BND Ribu) Value (BND Thousand)
Pertanian, Perhutanan dan Perikanan <i>Agriculture, Forestry and Fishery</i>	289	1,754	484	1,270	6	7.5
Perombongan dan Kuari <i>Mining and Quarrying</i>	40	5,277	3,815	1,462	132	110.5
Pembuatan <i>Manufacturing</i>	695	8,187	2,782	5,405	12	17.7
Elektrik, Gas, Air dan Lain-Lain Aktiviti Industri <i>Electricity, Gas, Water Supply and Other Industrial</i>	20	283	73	210	14	19.2
Pembinaan <i>Construction</i>	691	22,719	3,338	19,381	33	11.1
Perdagangan Borong dan Runcit <i>Wholesale and Retail Trade</i>	1,907	22,750	9,952	12,798	12	14.8
Aktiviti Perkhidmatan Penginapan dan Makanan <i>Accommodation and Food Service Activities</i>	536	9,563	3,351	6,212	18	9.1
Pengangkutan dan Penyimpanan <i>Transportation and Storage</i>	166	4,972	3,081	1,891	30	25.6
Maklumat dan Perhubungan <i>Information and Communication</i>	98	2,345	2,026	319	24	30.6
Aktiviti Kewangan dan Insuran <i>Financial and Insurance Activities</i>	102	3,368	3,274	94	33	44.8
Aktiviti Hartanah <i>Real Estate Activities</i>	67	675	514	161	10	18.2
Perkhidmatan Profesional, Teknikal, Pentadbiran dan sokongan <i>Professional, Technical, Administrative and Support Services</i>	437	11,234	6,439	4,795	26	22.2
Pendidikan <i>Education</i>	128	3,126	1,851	1,275	24	27.3
Aktiviti Kesihatan dan Kerja Sosial <i>Human Health and Social Work Activities</i>	41	664	388	276	16	34.3
Lain-lain Aktiviti Perkhidmatan <i>Other Services Activities</i>	349	2,690	1,150	1,540	8	10.3
Jumlah / Total	5,566	99,607	42,518	57,089	18	22.2

PROFIL DAN PRESTASI SEKTOR SWASTA
PROFILE AND PERFORMANCE OF PRIVATE SECTOR

Aktiviti Activity	Keluaran Kasar Gross Output			Nilai Tambah Kasar Gross Value Added		
	Jumlah Total	Purata Setiap Perusahaan Average per Enterprise	Purata Setiap Pekerja Average per Worker	Jumlah Total	Purata Setiap Perusahaan Average per Enterprise	Purata Setiap Pekerja Average per Worker
	Nilai (BND Ribu) Value (BND Thousand)					
Pertanian, Perhutanan dan Perikanan <i>Agriculture, Forestry and Fishery</i>	79,415.1	274.8	45.3	19,223.0	66.5	11.0
Perombongan dan Kuari <i>Mining and Quarrying</i>	12,479,018.9	311,975.5	2,364.8	9,567,743.7	239,193.6	1,813.1
Pembuatan <i>Manufacturing</i>	6,467,273.5	9,305.4	789.9	2,791,948.8	4,017.2	341.0
Elektrik, Gas, Air dan Lain-Lain Aktiviti Industri <i>Electricity, Gas, Water Supply and Other Industrial Activities</i>	86,273.1	4,313.7	304.9	12,299.8	615.0	43.5
Pembinaan <i>Construction</i>	1,948,607.5	2,820.0	85.8	382,104.8	553.0	16.8
Perdagangan Borong dan Runcit <i>Wholesale and Retail Trade</i>	1,418,228.5	743.7	62.3	794,097.0	416.4	34.9
Aktiviti Perkhidmatan Penginapan dan Makanan <i>Accommodation and Food Service Activities</i>	277,965.7	518.6	29.1	134,980.0	251.8	14.1
Pengangkutan dan Penyimpanan <i>Transportation and Storage</i>	1,038,817.1	6,257.9	208.9	306,748.1	1,847.9	61.7
Maklumat dan Perhubungan <i>Information and Communication</i>	554,143.4	5,654.5	236.3	285,883.7	2,917.2	121.9
Aktiviti Kewangan dan Insuran <i>Financial and Insurance Activities</i>	960,518.8	9,416.9	285.2	686,329.0	6,728.7	203.8
Aktiviti Hartanah <i>Real Estate Activities</i>	38,698.2	577.6	57.3	15,210.9	227.0	22.5
Perkhidmatan Profesional, Teknikal, Pentadbiran dan sokongan <i>Professional, Technical, Administrative and Support Services</i>	716,164.4	1,638.8	63.7	360,956.2	826.0	32.1
Pendidikan <i>Education</i>	118,948.2	929.3	38.1	99,179.3	774.8	31.7
Aktiviti Kesihatan dan Kerja Sosial <i>Human Health and Social Work Activities</i>	69,109.8	1,685.6	104.1	29,807.9	727.0	44.9
Lain-lain Aktiviti Perkhidmatan <i>Other Services Activities</i>	73,463.3	210.5	27.3	49,481.6	141.8	18.4
Jumlah / Total	26,326,645.5	4,729.9	264.3	15,535,993.9	2,791.2	156.0