

AUTOMOTIVE ***SUMMIT 2014***



Green Mobility Changing the World

19 - 20 June 2014

Bitec Bangna, Bangkok

AUTOMOTIVE SUMMIT 2014



ASEAN the New Chapter in Global Automotive Industry

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June 19, 2014

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Industry Outlook



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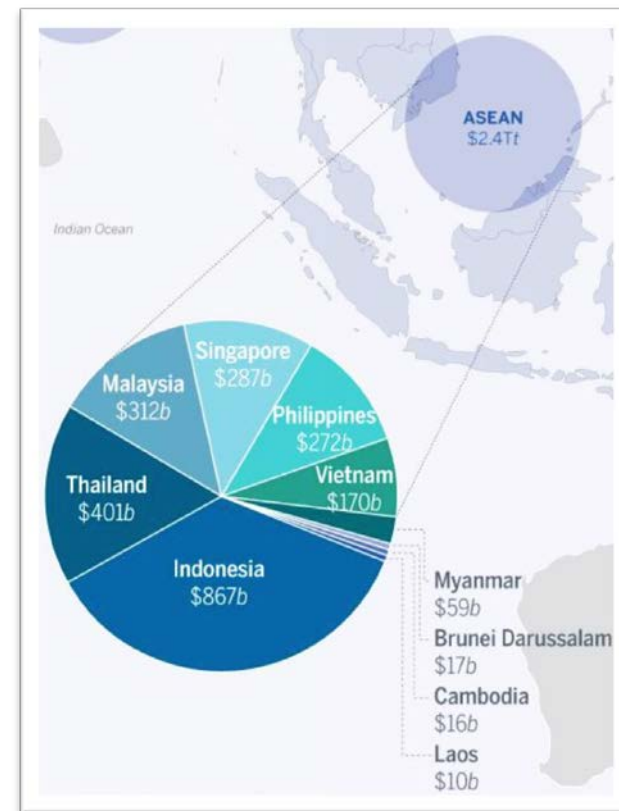
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ASEAN as a \$2.4 Trillion Economy

ASEAN Data

GDP (2013)	\$2.4 Trillion
Population (2013)	620 million
Real GDP Growth Rate (2013)	5.1%
Car Population (2011)	26 million
Number of vehicles per '000 (2011)	Less than 50

Source: East-West Center; USTR.gov; McKinsey Global Institute Analysis; Frost & Sullivan



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ASEAN automotive industry-Global Rank

Global Rank		Sales 2011		Sales 2015F		Sales 2018F
1		17,708,634		29,010,852		33,391,276
2		11,562,701		16,466,283		16,970,585
3		3,524,789		5,788,462		9,039,806
4		3,475,760		5,364,935		6,287,188
5		3,173,634		4,591,476		4,717,218
6		2,904,338		3,850,511		4,692,961
7		2,692,200		3,499,860		4,025,975
8		2,409,826		3,429,031		3,968,411
9		2,204,229		2,704,451		2,897,909
10		1,941,253		2,563,360		2,793,822

ASEAN region is likely to become 6th largest automotive market in the world by 2018

Source: Frost & Sullivan

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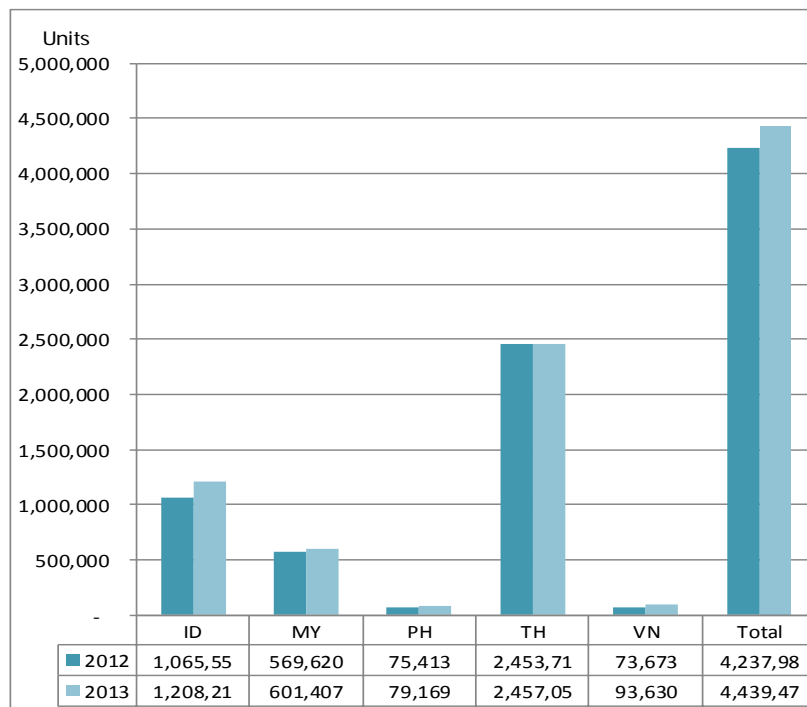


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ASEAN Total Car Production in 2013



Source: ASEAN Automotive Federation



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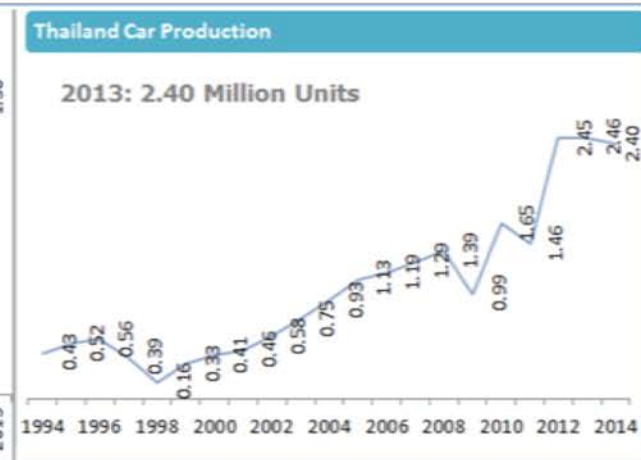
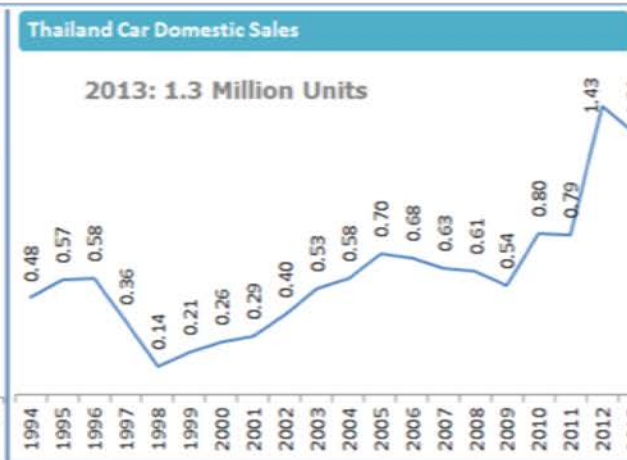
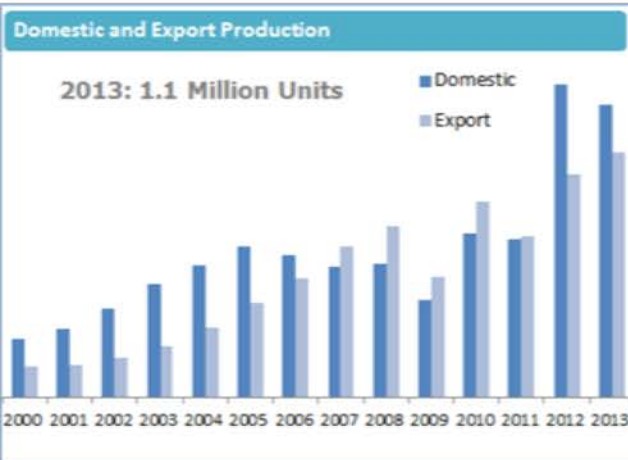
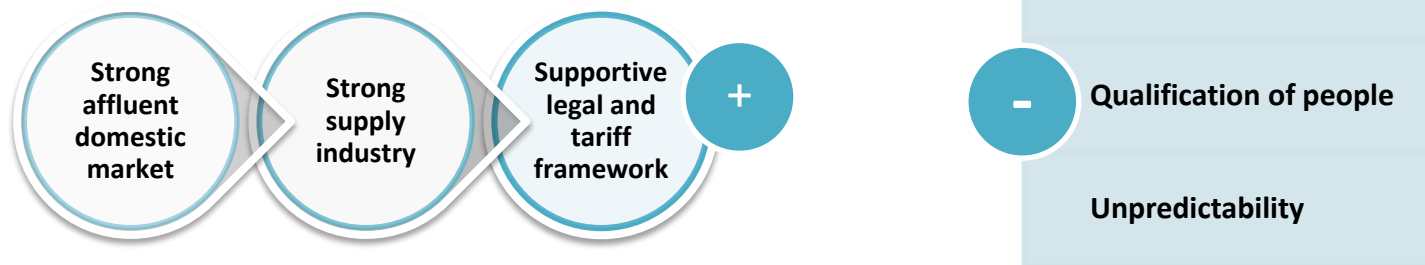


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Thailand as location base for foreign investors



Source: Automotive Industry Club

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Challenges

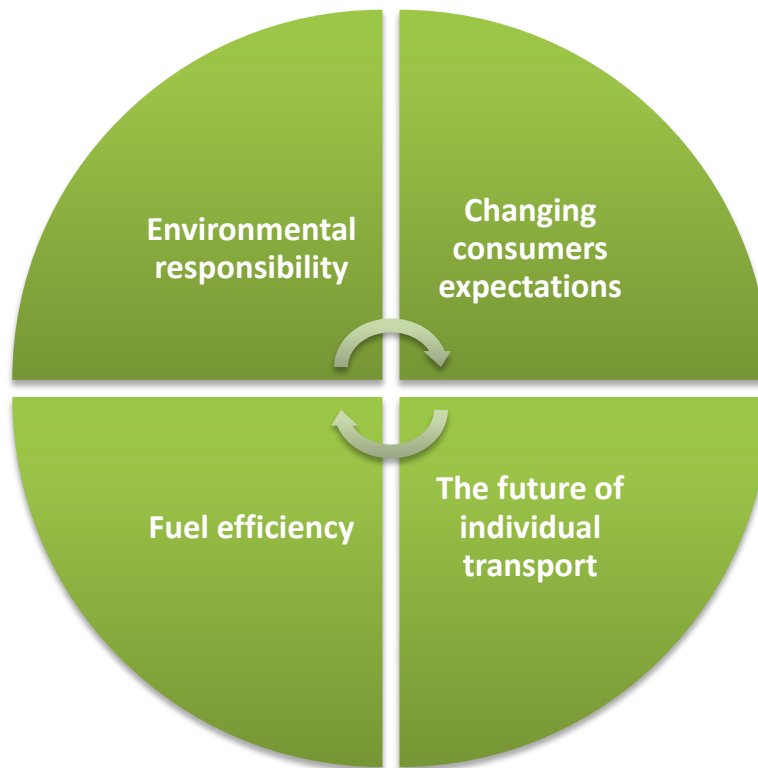


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The green challenge



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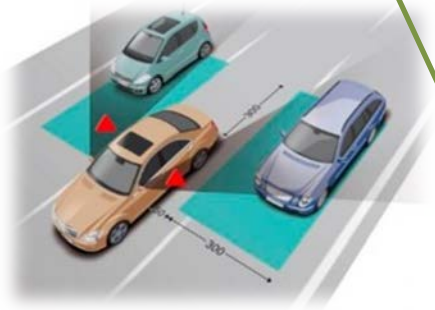
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Thai automotive industry challenges

Transfer of New
Technology



Require higher skill set of local
workforce



Sales and aftersales become
more difficult and costly



Need more customer
interaction and education.



The suppliers need
safeguarding local content



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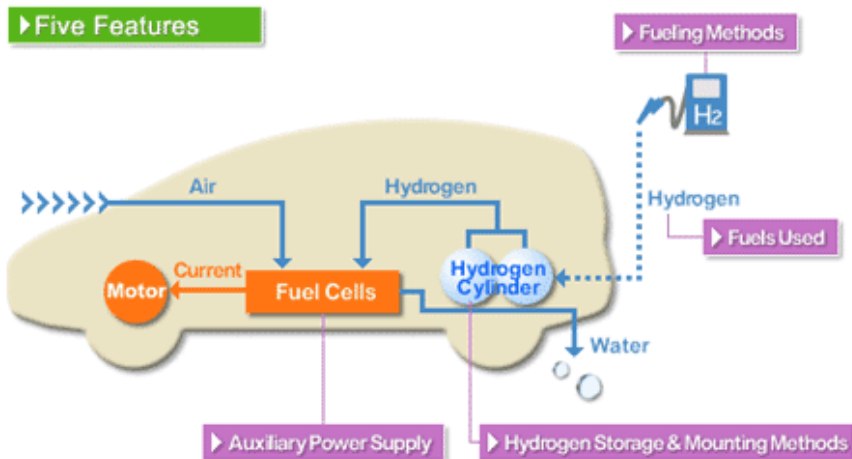
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Contributions of Auto Industry to Green Technology



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Legal Challenges



CO2 legislation



Fleet Regulations



The 2020 CO2 target



Fiscal subsidies
for electric cars



Entry Regulations for
city centers based on
CO2 exhaust of cars



Diesel Particle Filter

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Environmental Protection

1. Hybridization, fuel cell, e-cars

2. Catalyzer

3. Smart petrol and diesel technologies



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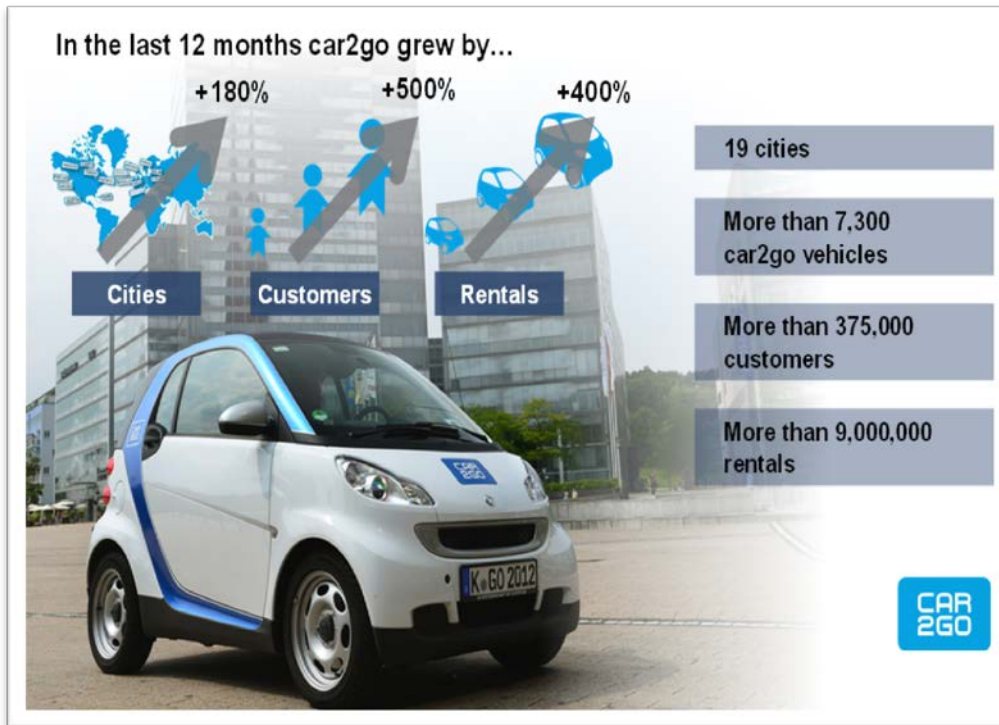
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Traffic Projects

1. Car2go in EU



2. Car sharing portal



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Recommendation

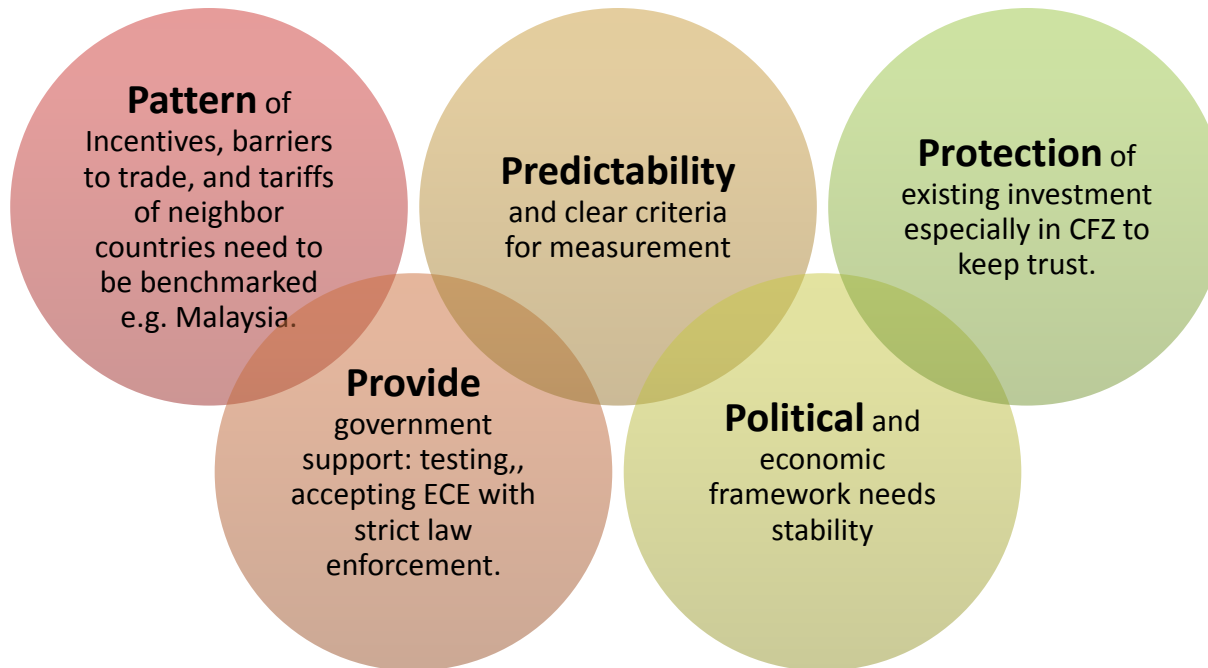


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How the Thai automotive industry will stay competitive in this changing environment?



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