

AUTOMOTIVE ***SUMMIT 2014***



ASEAN the New Chapter in Global Automotive Industry

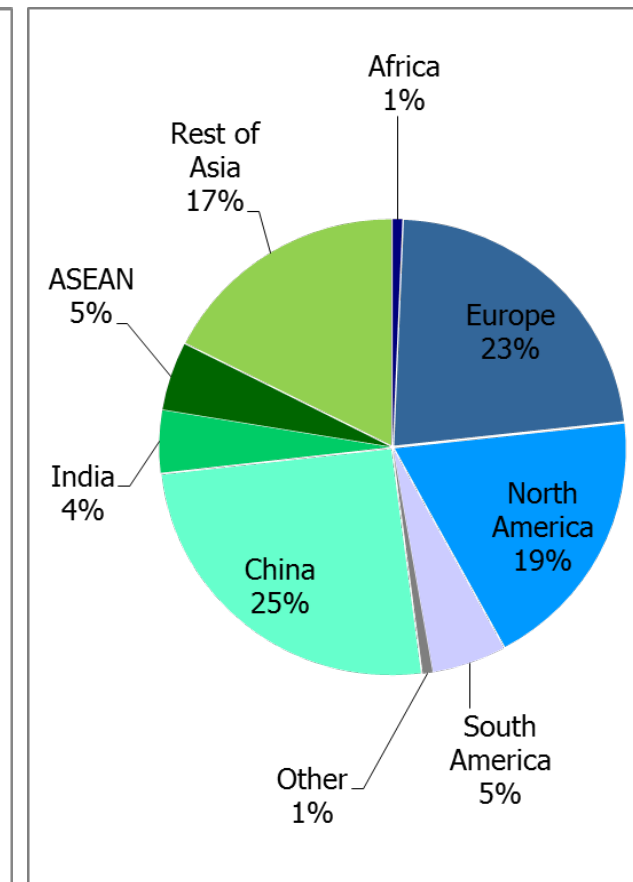
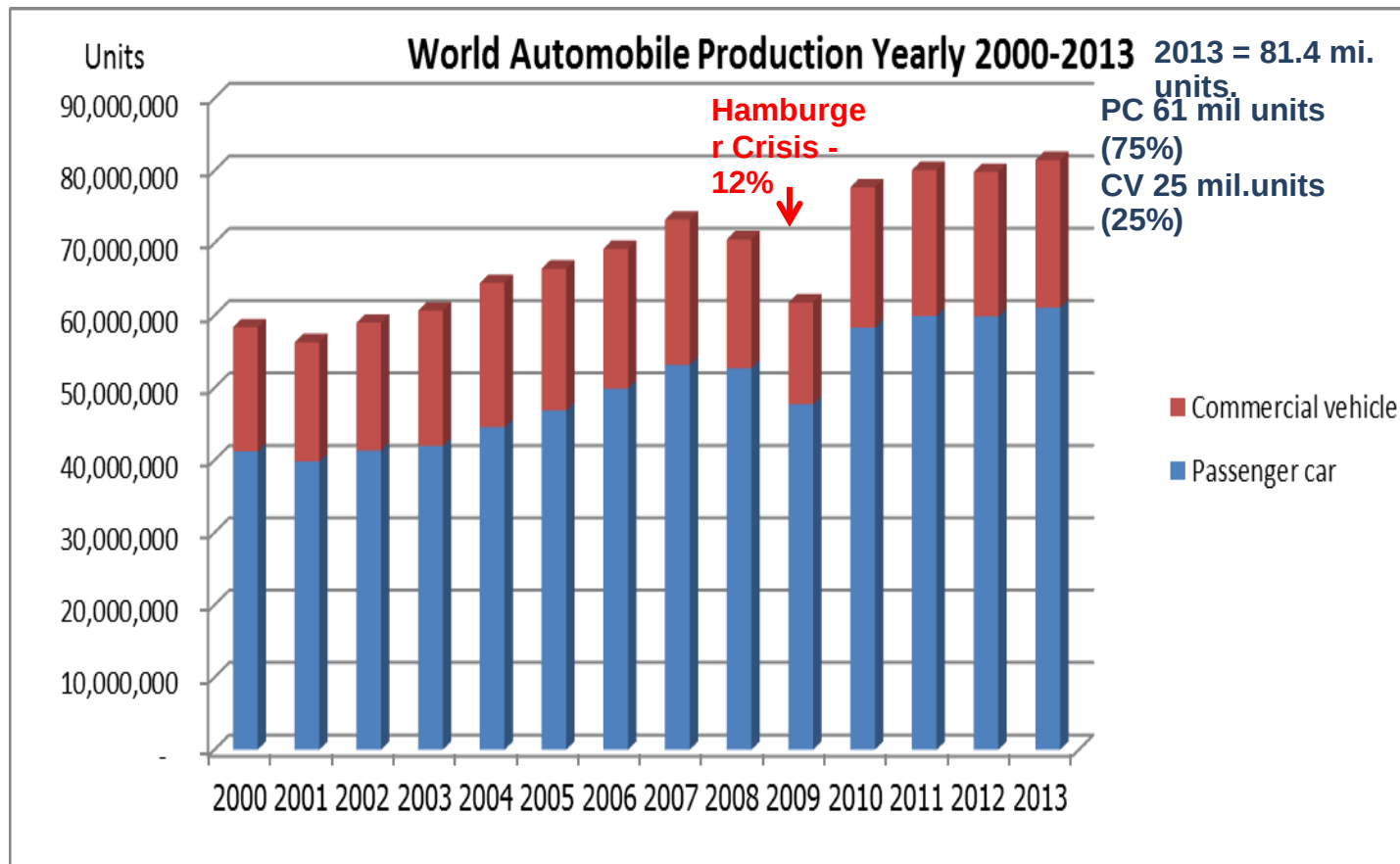
Mr. Vichai Jirathiyut
President, Thailand Automotive Institute

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19-20
June 2014

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Thailand

World Automobile Production



Source: FOURIN

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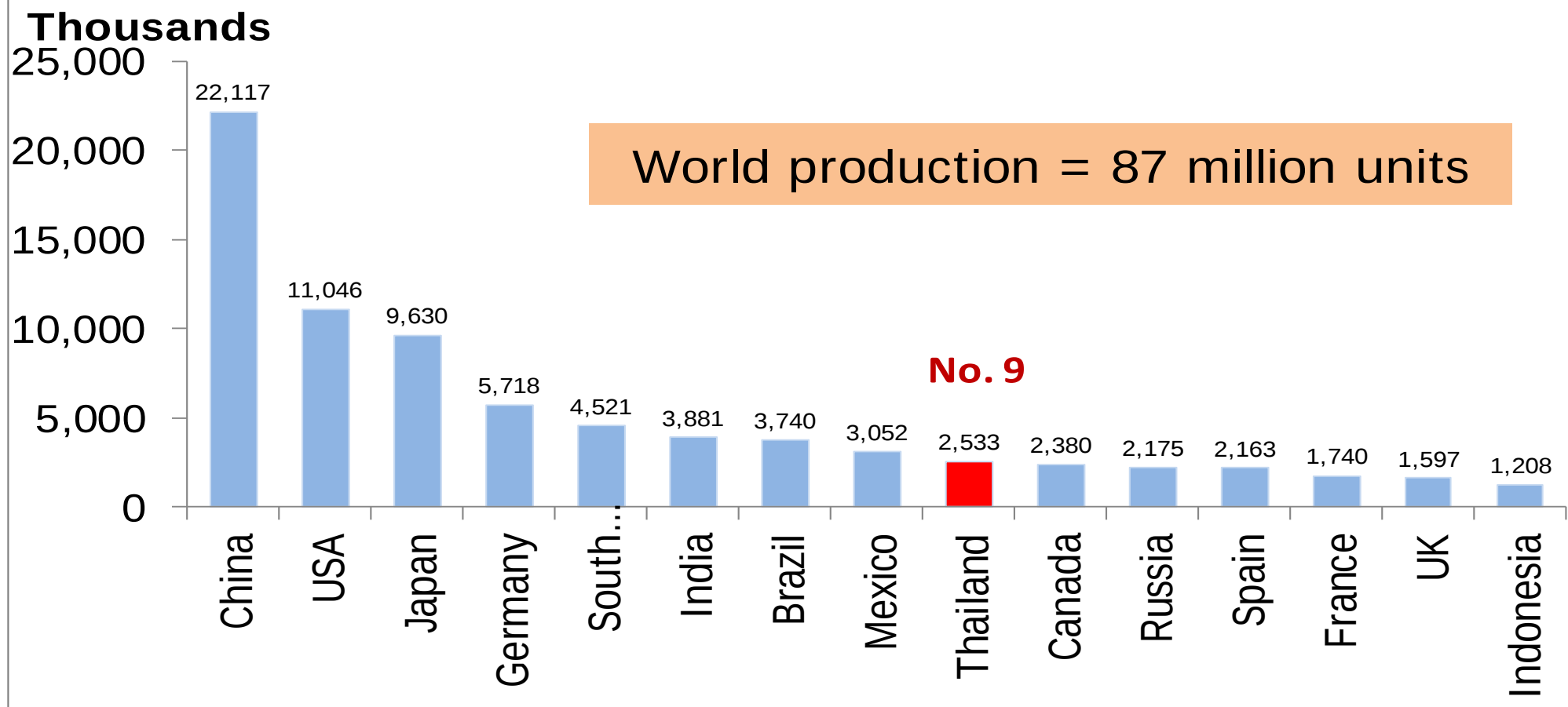
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Global Automobile Production Ranking 2013



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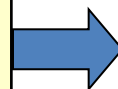
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The way forward of Thailand Vision 2011

“Thailand is production base in Asia which creates more value added to the country with strong automotive parts industry”

ประเทศไทยเป็นฐานการผลิตยานยนต์ของเอเชีย สามารถสร้างมูลค่าเพิ่มในประเทศด้วยอุตสาหกรรมชิ้นส่วนยานยนต์ที่แข็งแกร่ง



Vision 2021

“Thailand is a global **green** automotive production base with strong domestic supply chains which create high value added for the country”

ประเทศไทยเป็นฐานการผลิตยานยนต์ของโลกด้วยห่วงโซ่อุปทาน (Supply chain) ที่สร้างมูลค่าเพิ่มในประเทศและเป็นมิตรกับสิ่งแวดล้อม

Green = Environmental friendly & international standard

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Master Plan for Thai Automotive Industry 2012-2016



COE = Center of Excellence

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ENV = Good Business Environment

SWOT Analysis of Thailand Automotive Industry

Strength

1. World Production base (Rank No. 9 in 2013)
2. Supplier's long experience
3. Competitive supply chain
4. High skill labor
5. Competitive in geographical area
6. Government policy
7. Emission Standard higher than Malaysia, Indonesia

Opportunity

1. New investment from Eco car II promoted policy
2. New Testing, R&D center investment
3. Growth and development of supplier from Thailand to be the world production base and hub of ASEAN
4. AEC 2015 increase free flow of products, labor, trade and investment
5. Development of alternative/renewable energy vehicles

Source : Thailand Automotive Institute (TAI)

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SWOT Analysis of Thailand Automotive Industry

Weakness

1. Inadequate of Testing , R& D center for development
2. Cost of labor in creasing
3. Trend of lacking skilled labor in future
4. Few number in outbound investment
5. Limited know-how transfer

Threat

1. Uncertainty from the climate change
2. NTBs/NTMs increasing in competition
3. Development of the competitor in advanced technology (China, India, Indonesia, Malaysia)
4. Change of new automotive technology

Source : Thailand Automotive Institute (TAI)

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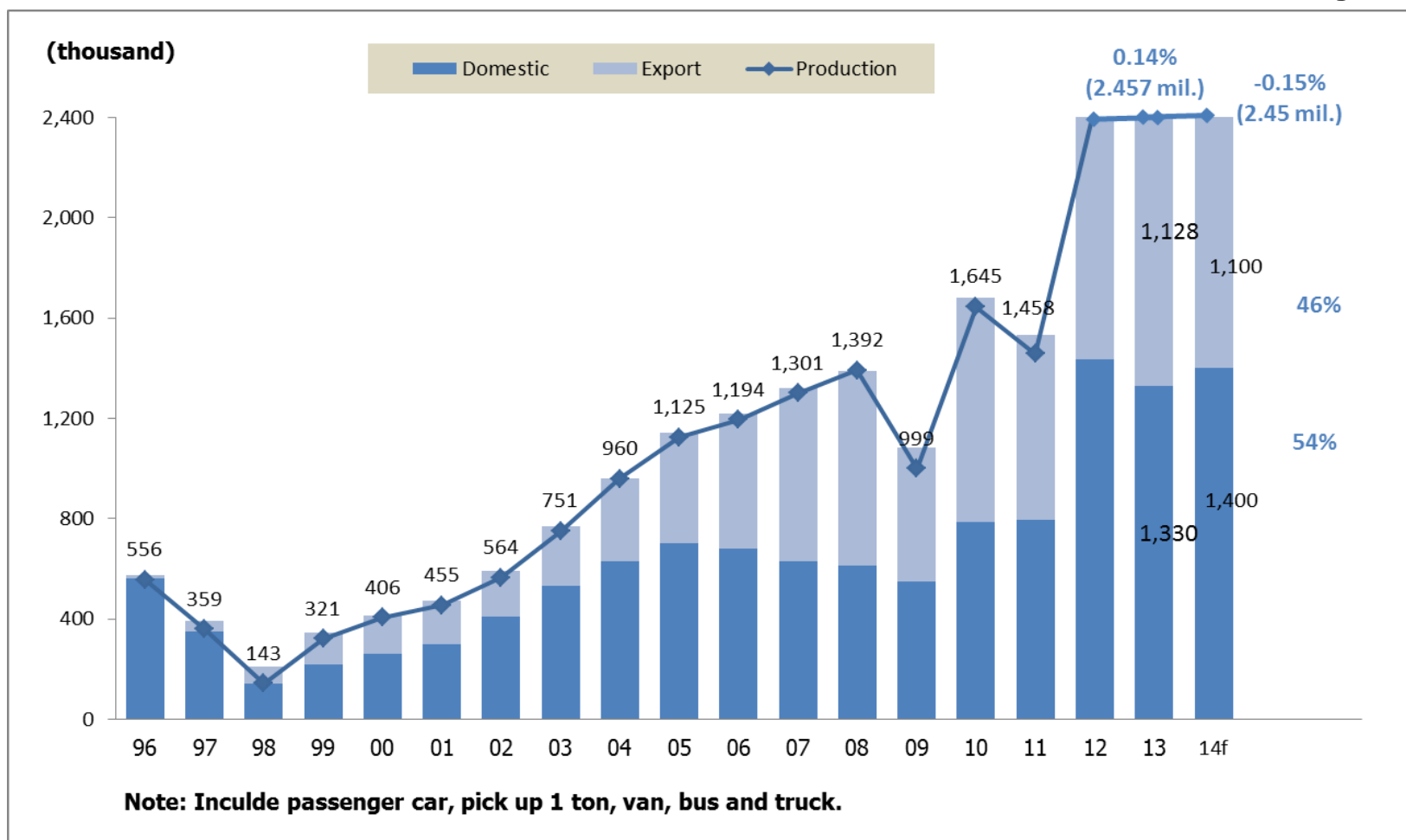


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Current Situation of Thailand Automotive Industry



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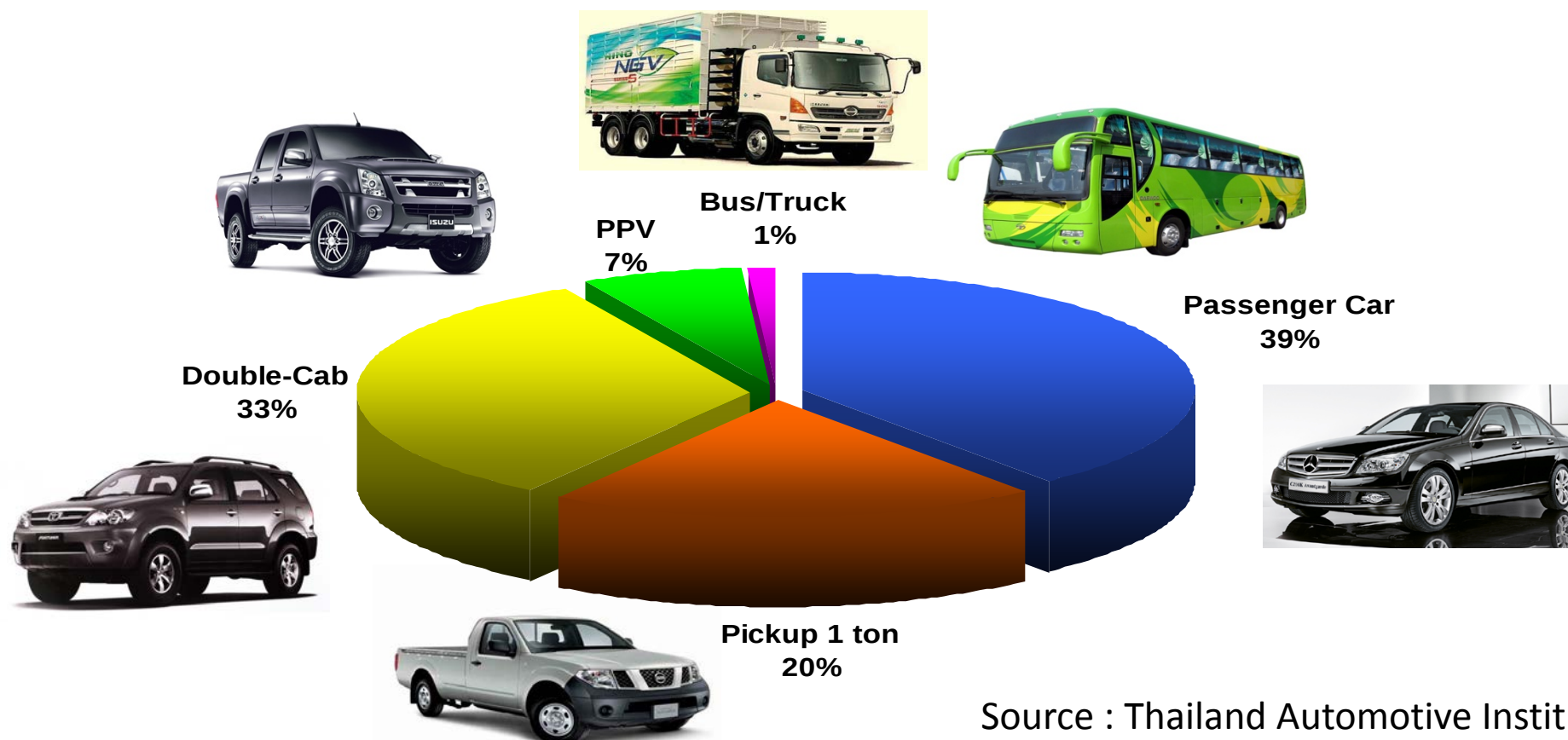


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Proportion of Type of vehicles in Thailand Production 2014



Source : Thailand Automotive Institute (TAI)

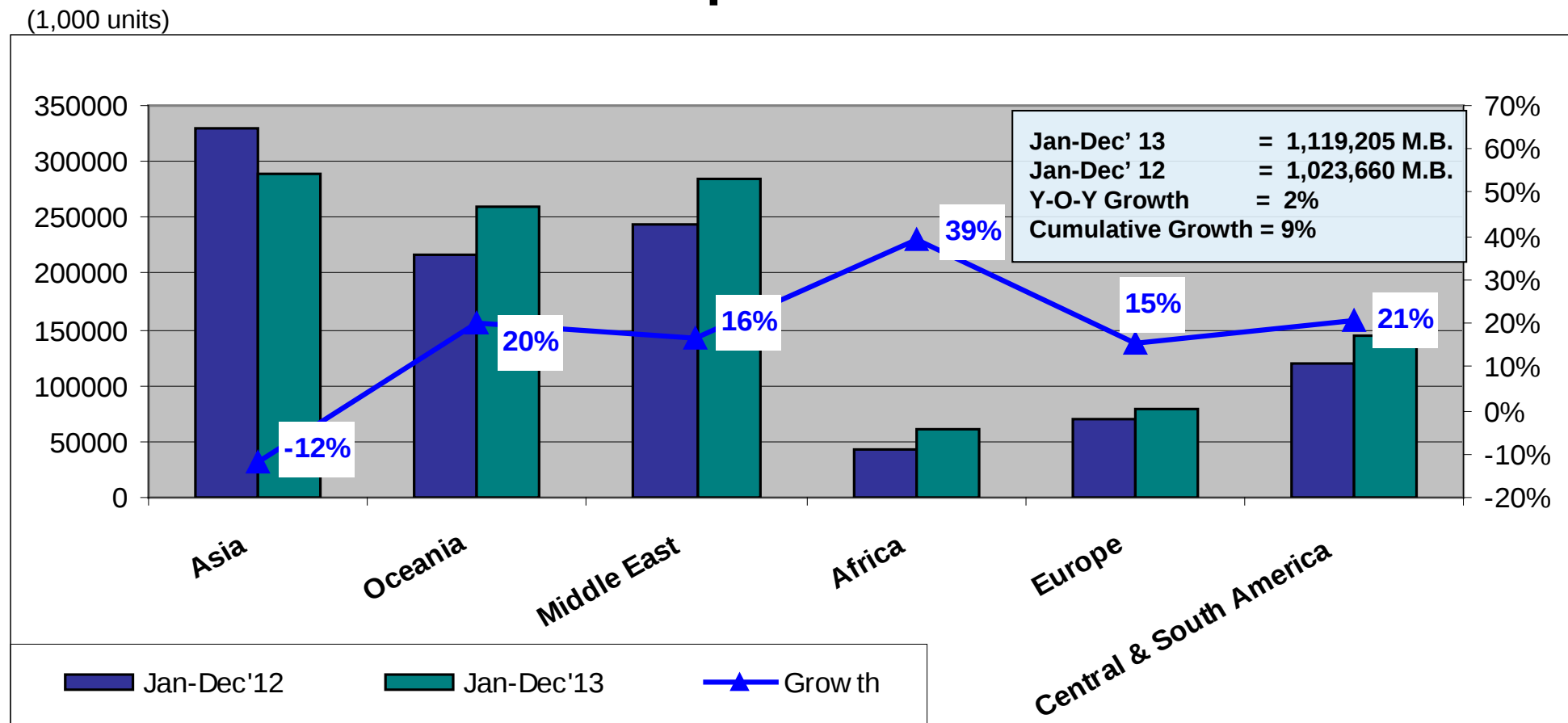
Note: PPV is Pick-up Passenger Vehicle

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Thailand Vehicle Export to the World 2012-2013



Source : Thailand Automotive Institute (TAI)

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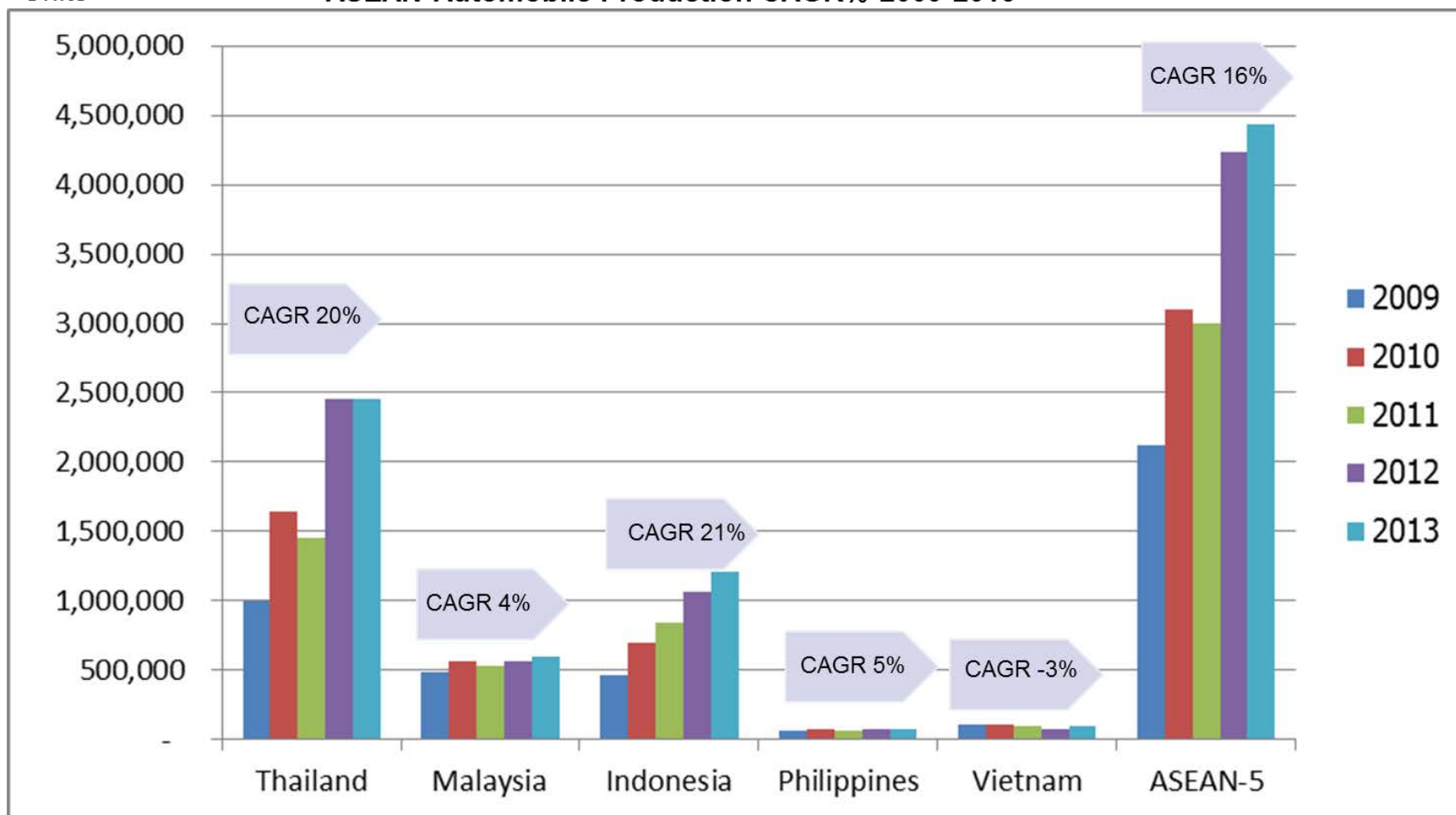
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ASEAN Automobile Production CAGR% 2009-2013



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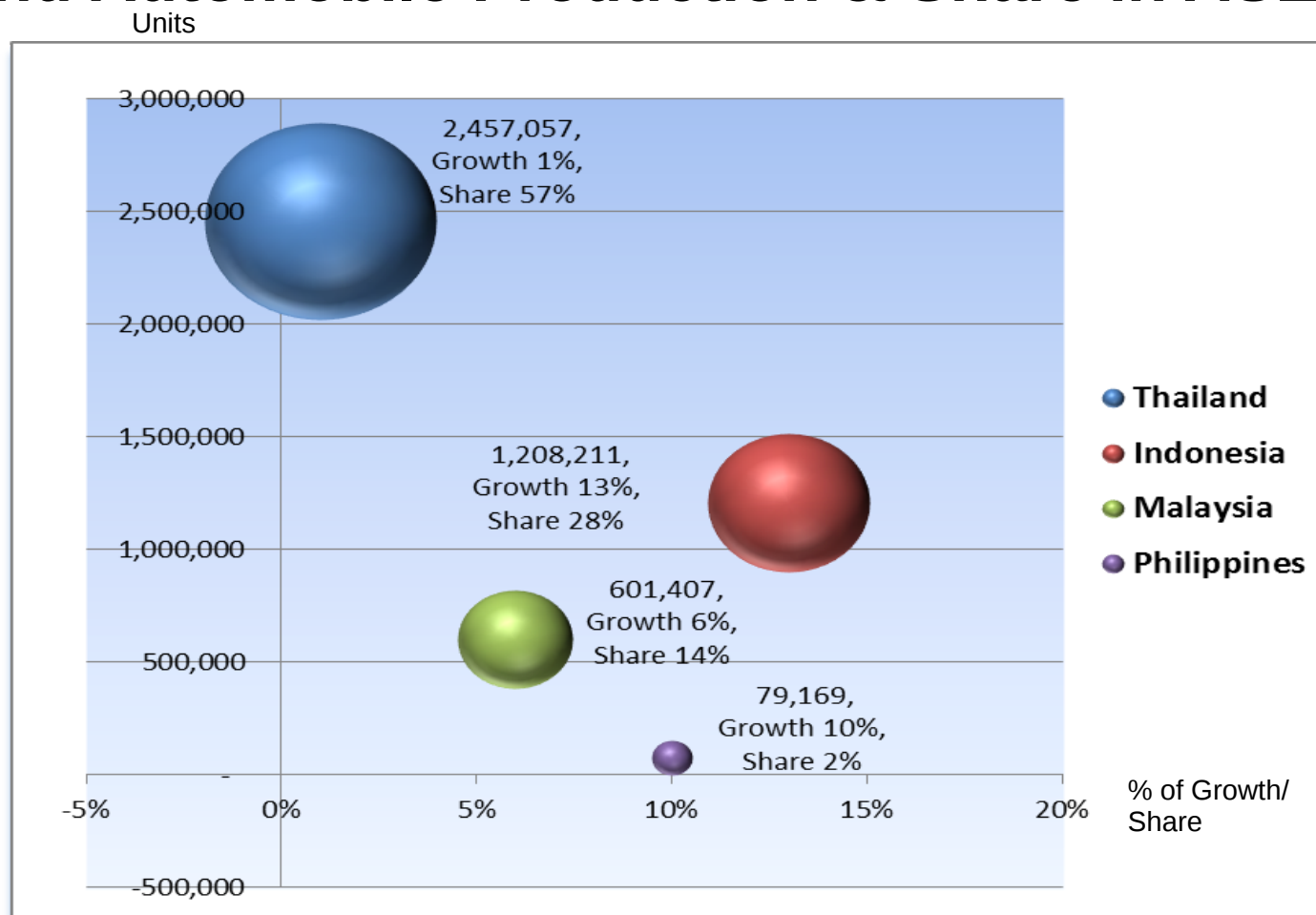


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Thailand Automobile Production & Share in ASEAN 2012



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Export-Import of Thailand Automotive Industry

Unit : M.B.

	2012 (Jan-Dec)	2013 (Jan-Dec)	Growth (%)
Export	1,010,349	1,056,900	5
-Car	494,350	515,636	4
-Motorcycle	35,486	43,171	22
-Auto parts	480,513	498,093	4
Import	669,100	611,565	-9
-Car	73,098	58,346	-20
-Motorcycle	4,009	5,105	27
-Auto parts	591,993	548,114	-7
Export > Import	341,249	445,334	31

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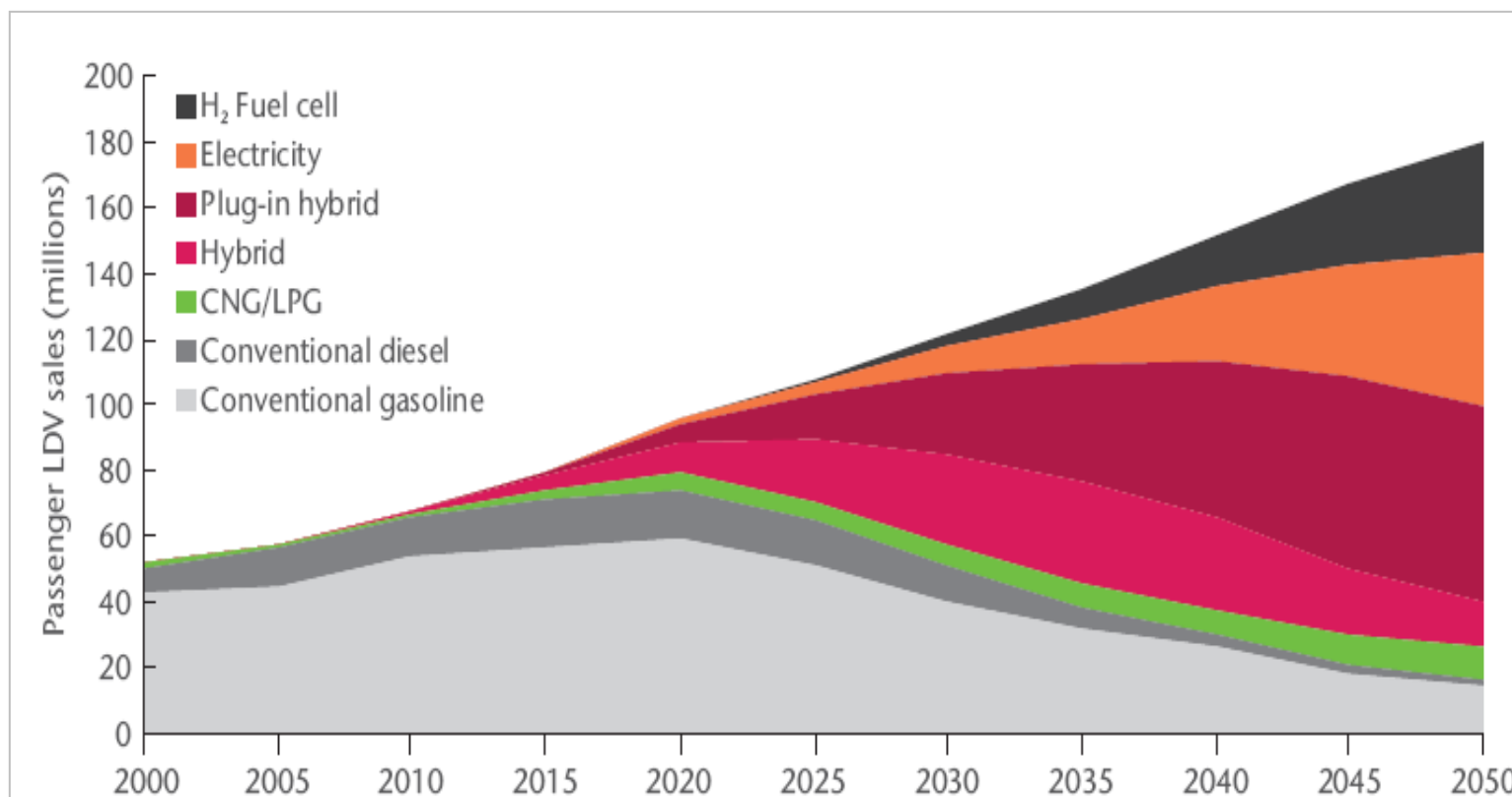


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Automotive Industry Trends (Environmental Issues)



Source : International Energy Agency (IEA)

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