



AUTOMOTIVE SUMMIT 2014

**19-20
June** 2014

BITEC • Bangkok
Thailand

Ms. Piengjai Keawsuwan

President of ASEAN Automotive Federation

ASEAN AUTOMOTIVE FEDERATION

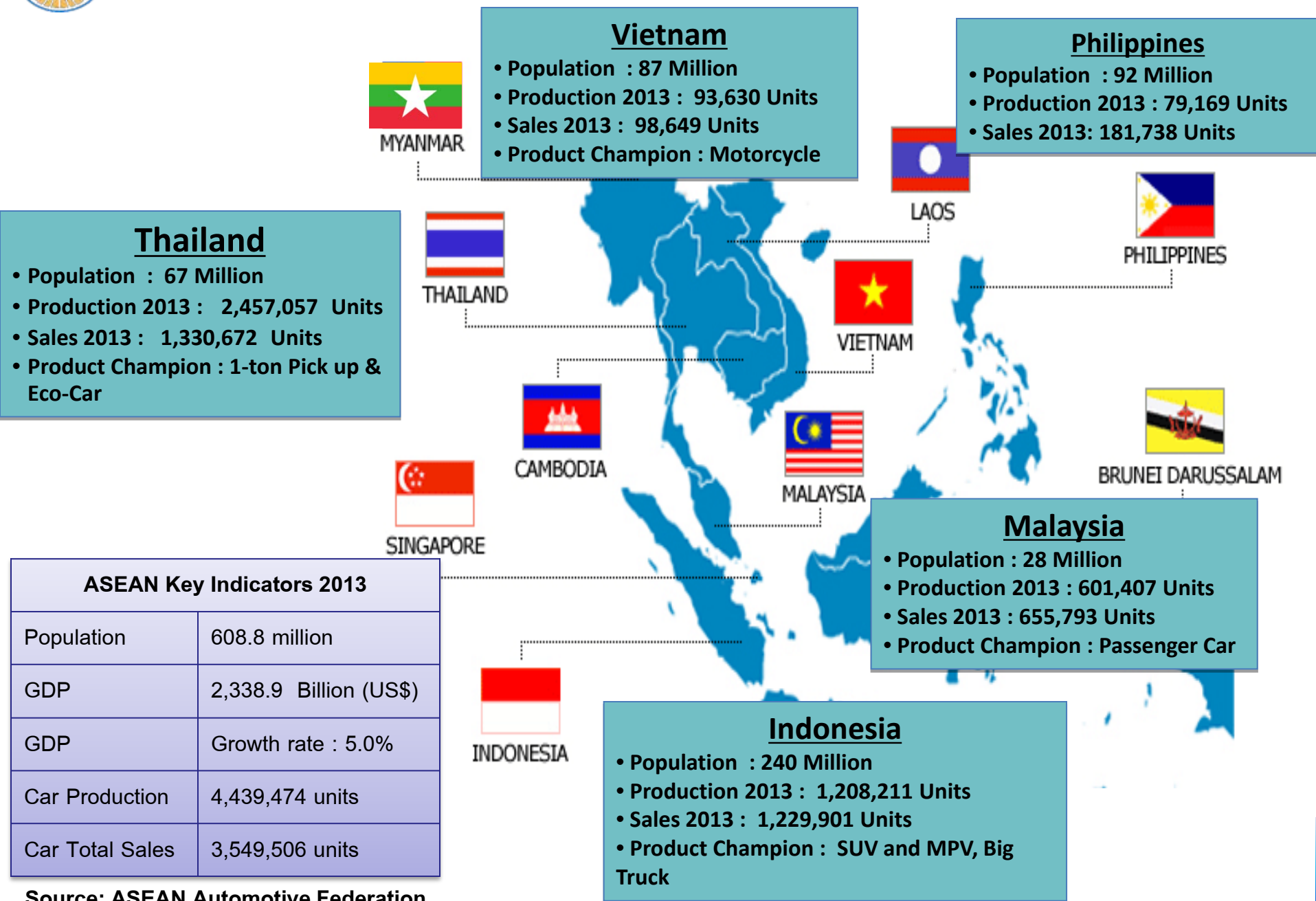




Overview of ASEAN Automotive Industry



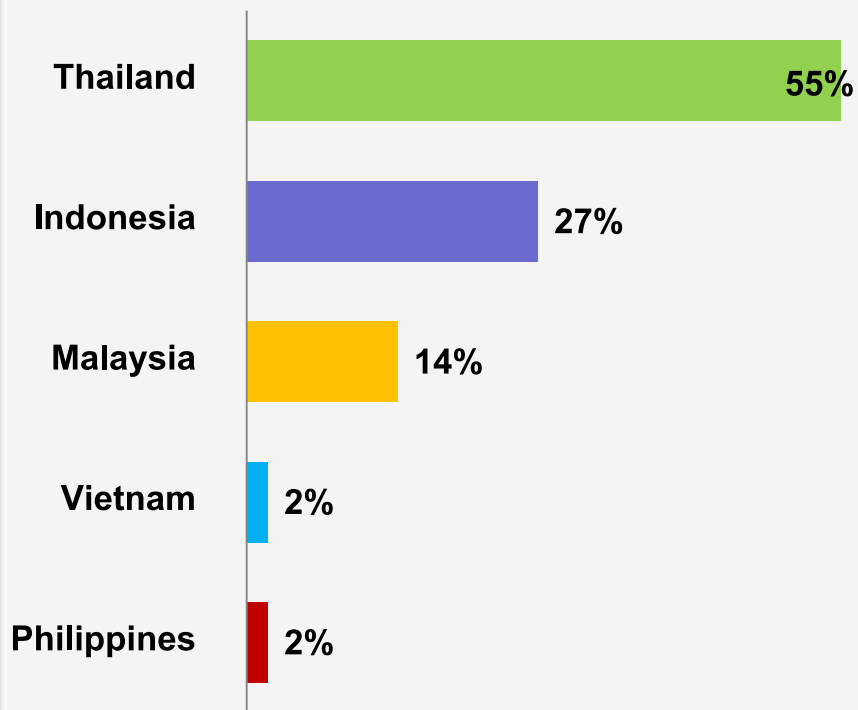
Overview of ASEAN Automotive Industry



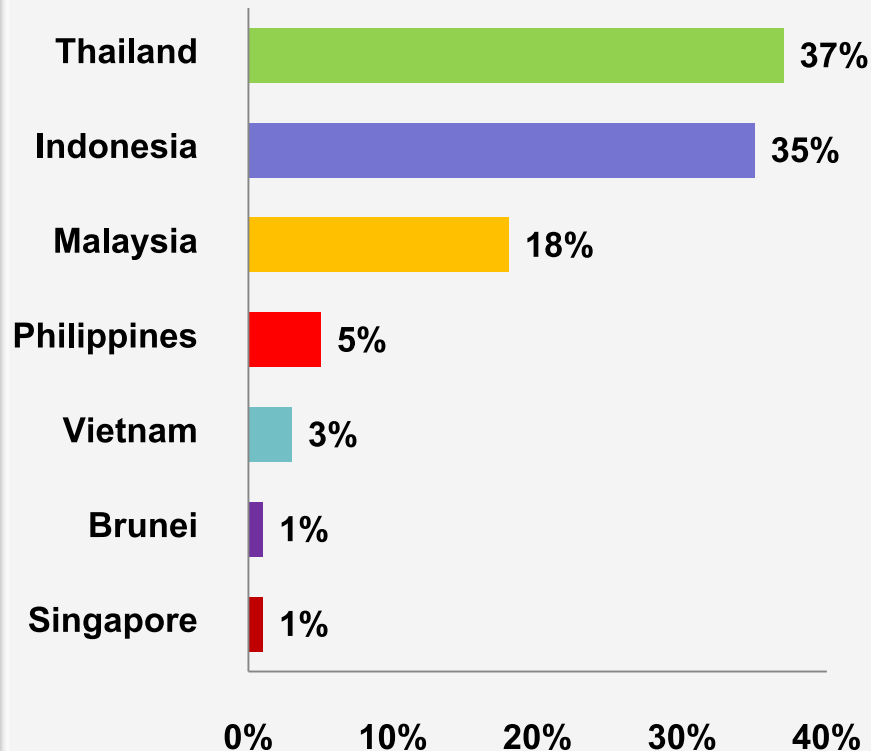


ASEAN Automotive Industry Performance

Car Production 2013

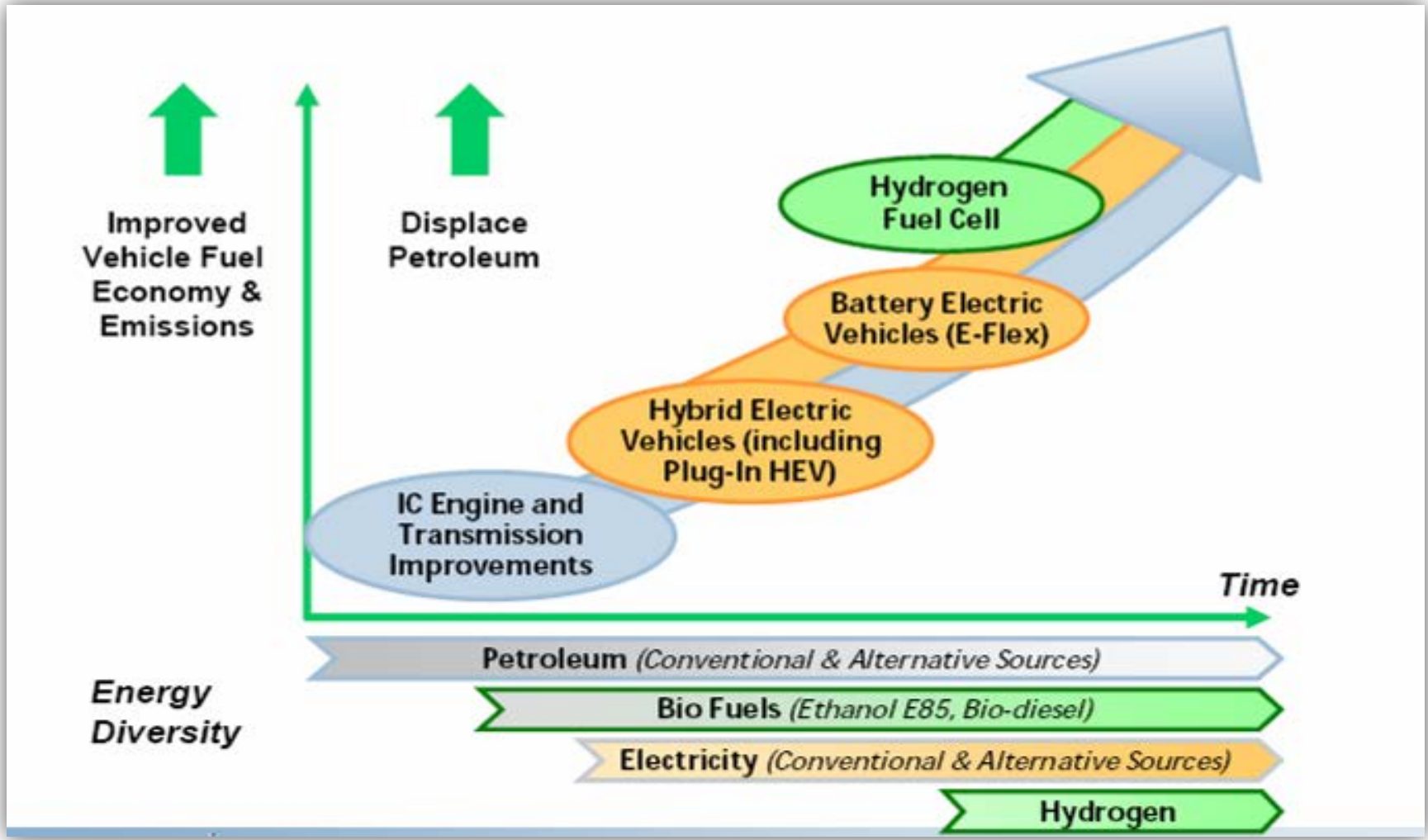


Car Sales 2013





World Vehicle Technology & Energy Diversity





ASEAN is moving forward to Green Technology



Thailand

Hub of
global green
automotive
production



Indonesia

Low Cost Green
Car Program
--> Low Carbon
Emission
Program



Malaysia

Hub of Energy
Efficient
Vehicles (EEV)



Philippines

Tax incentives
to manufacturers
and importers of
EV and Hybrid
cars

Green Technology





The integration of AEC

The Strength and Opportunity of Automotive Industry



ASEAN Growth story is continuing

By 2018, ASEAN would be 6th largest market globally

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		2,593,769		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

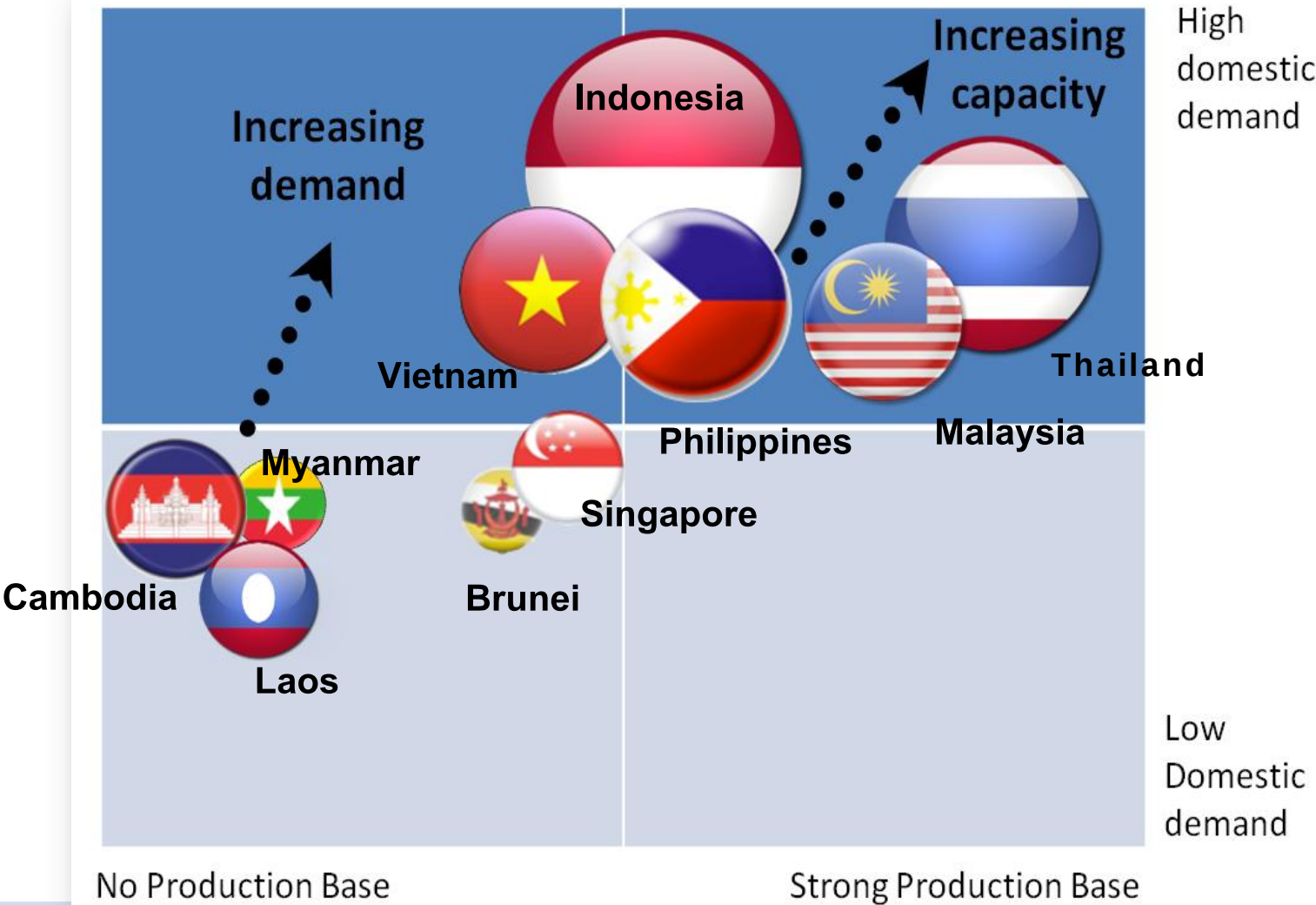
China USA Japan Brazil Germany India Russia ASEAN France UK Italy





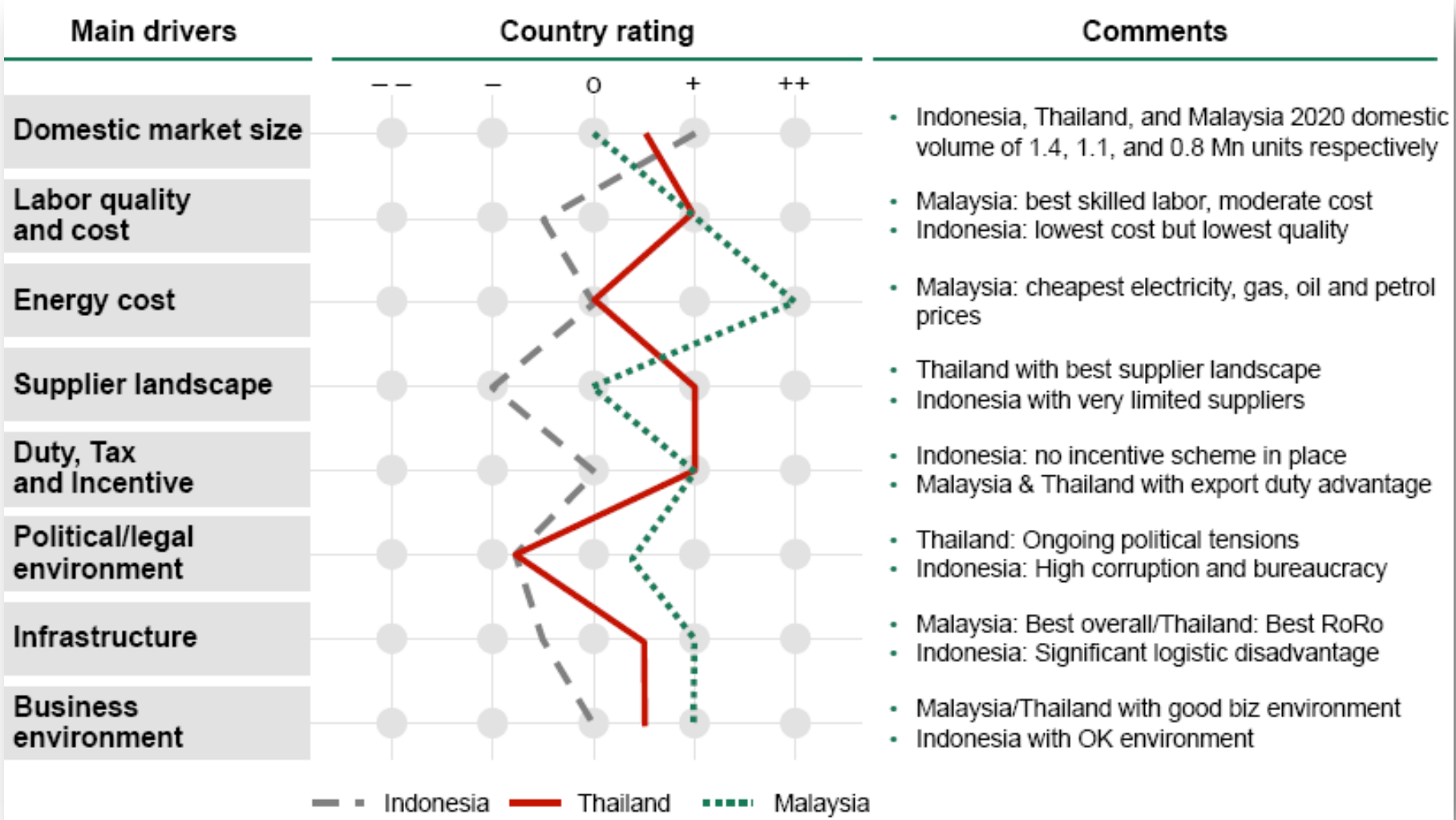
Overview of ASEAN Automotive Industry

ASEAN Automotive Matrix





Competitiveness among big 3 ASEAN countries





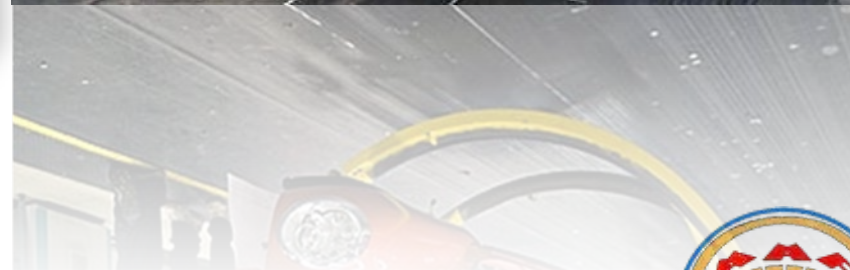
The integration of AEC



Skill Development

Technology Development

**Increasing productivity
(off-set to wage increasing)**





Thailand

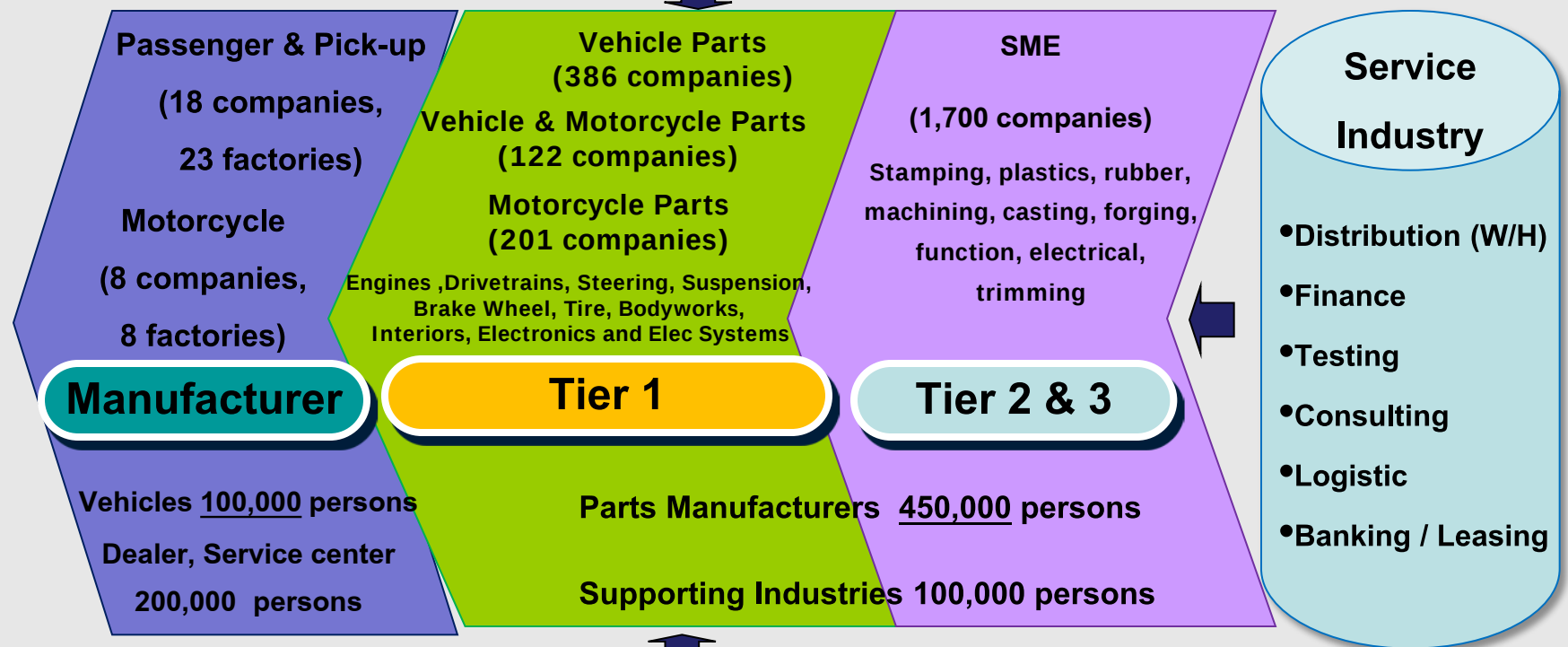
The Leader of Automotive Industry in ASEAN



Thai Automotive Cluster and Supply Chain Structure

SUPPORTING INDUSTRY

MACHINERY, EQUIPMENT&DEVICE, MOLD & DIE, JIG & FIXTURE



Upstream Industry

Steel, Plastic, Rubber, Electronics, Glass,

Textile, Leather, Chemical, Oil, Coating and Gulvanize



Policy & Supporting Body



Strength of Thai Automotive Industry

Top 100 Global Suppliers Active in Thai Automotive Industry

Japanese Global Suppliers

2. Denso	46. Bridgestone
4. Aisin Seiki	49. Tokai Rika
13. Yazaki	57. Showa
15. Sumitomo	61. Mitsuba
16. Toyota Boshoku	66. Asahi Glass
18. CalsonicKansei	72. Stanley
19. JTEKT	74. Akebono Brake
20. Hitachi	82. Sanden
28. Toyoda Gosei	84. F-Tech
33. NTN	92. Alpine
34. NSK	94. Pioneer
35. Mitsubishi	98. Omron
39. NHK Spring	
40. Koito	
41. TS Tech	
43. Takata	

28/29 Companies

Other Global Suppliers

1. Robert Bosch	36. Teneco
3. Continental	44. Federal-Mogul
6. Faurecia	47. Michelin
7. Johnson Control	50. GKN Driveline
8. ZF	51. Hella
11. TRW	52. Goodyear
12. Delphi	56. Grupo Antolin
14. Lear	58. Bayer
17. BASF	59. TI Automotive
21. Valeo	65. Draexlmaier
22. Visteon	67. American Axle
23. Autoliv	73. Rieter Auto.
25. Mahle	84. F-Tech
27. Dana	86. Hayes Lammerz
31. BorgWarner	93. 3M
36. Teneco	

30/71 Companies