

# THAILAND'S INDUSTRIAL AND INVESTMENT STRATEGIES: A WAY FORWARD

## 泰国工业与投资策略：前进之路

**H.E. M.R. Pongsvas Svasti**

蓬萨瓦·萨瓦帝瓦（亲王阁下）

Minister of Industry, THAILAND

泰国工业部长

9 August 2012

Beijing, China

GDP growth from 1999 – 2011

1999-2011年国内生产总值增长



QGDG 2011 – Q1, 2012

2011-2012年第一季度季度国内生产总值



## Overall Thailand GDP Growth

泰国国内生产总值整体增长

Adapted from NESDB (Feb 2012) and Index Mundi (2012)

## Economic Projections 2011-2013 (2011-2013 经济预测)

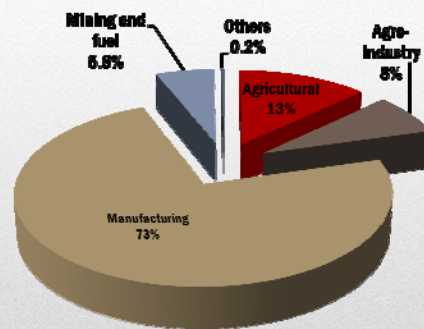
Economic Projections 经济预测	2011	2012	2013
1) GDP growth (percent y-o-y) GDP 增速(与上年同比增长的百分比)	0.1	5.7	5.0
2) Export, FOB value (percent y-o-y) 出口, 离岸值 (与上年同比增长的百分比)	16.4	7.0	10.8
3) Import, CIF value (percent y-o-y) 进口, 到岸值 (与上年同比增长的百分比)	24.7	14.0	10.1
4) MPI (2000=100) 制造业生产指数	172.56	176.88 (Jan-Jun)	N/A
5) Core Inflation 核心通胀率	2.4	2.2	1.9
6) Headline Inflation 通货膨胀率	3.8	2.9	3.4

Source: Bank of Thailand, Inflation Report July 2012, as of Aug 3, 2012 and OIE as of July 30, 2012

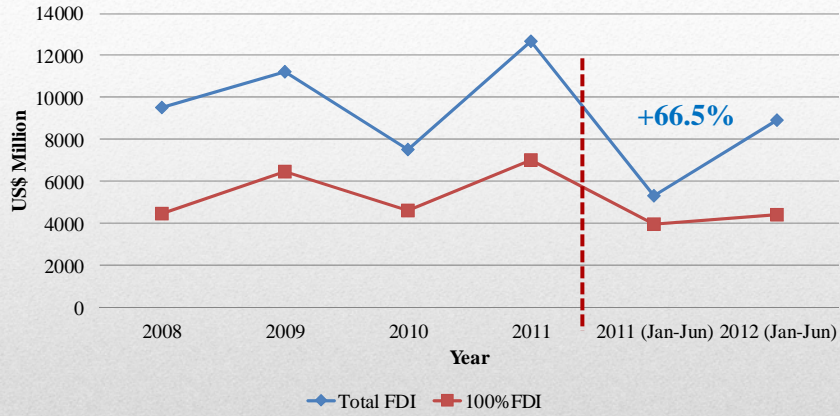
**Share GDP by Sector**  
按产业划分国内生产总值



**Share Export Value by Sector**  
按产业划分出口值

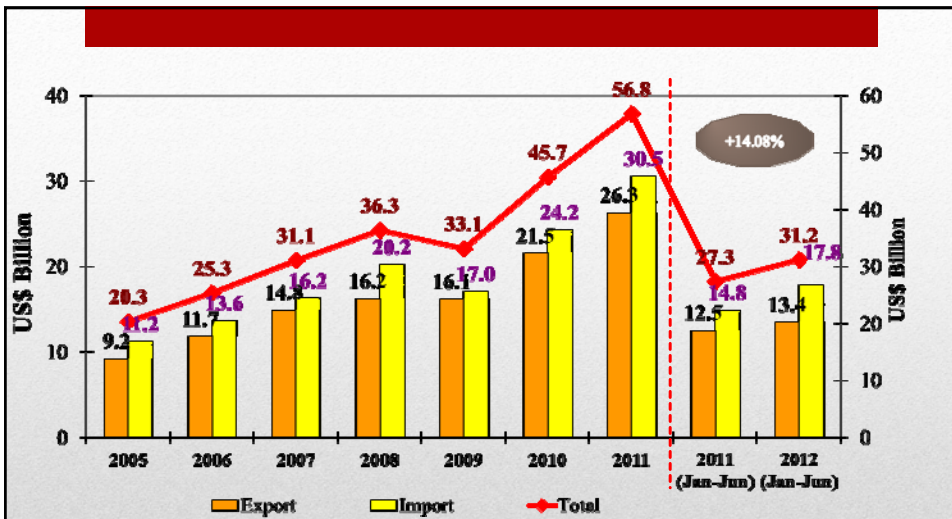


## Importance of the Manufacturing Sector 主要的制造业



## Foreign Direct Investment in Thailand 在泰国的外商直接投资

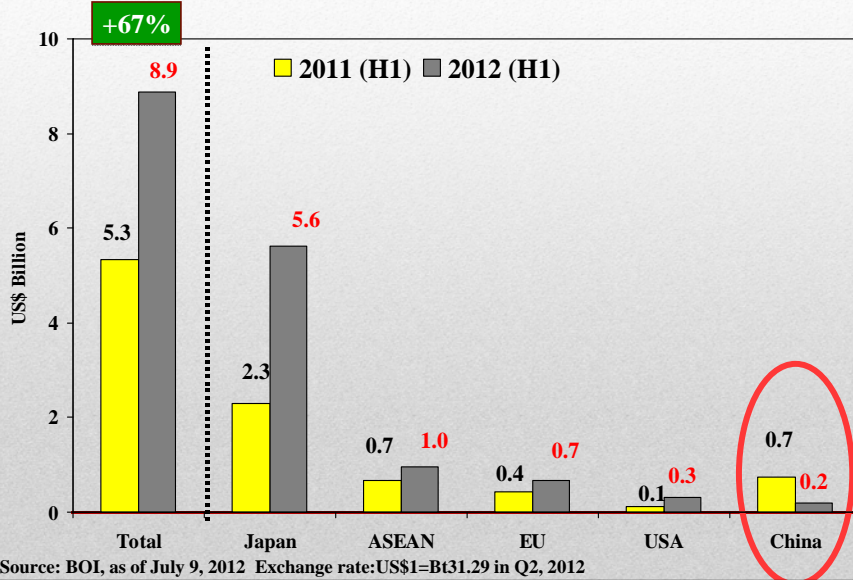
Source: BOI as of July 30, 2012 Exchange rate: US\$1=Bt31.29 in Q2, 2012



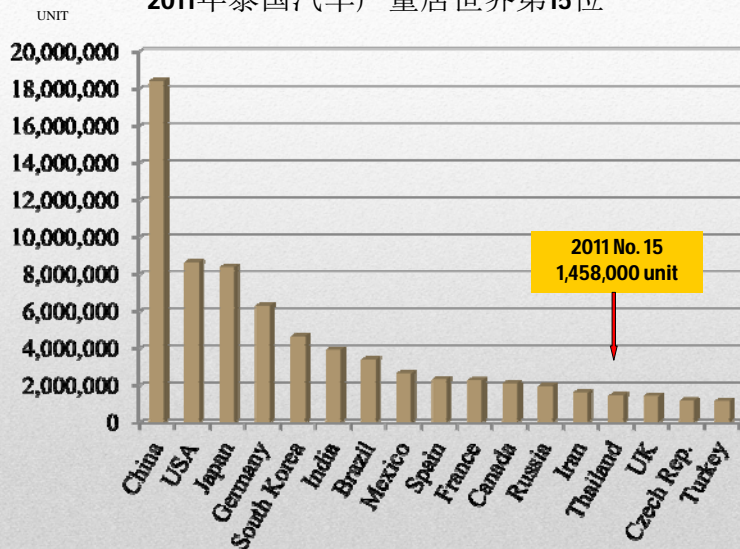
## Trade Summary Thailand/China 泰国与中国之间贸易概况

Source: MOC, as of July 30, 2012

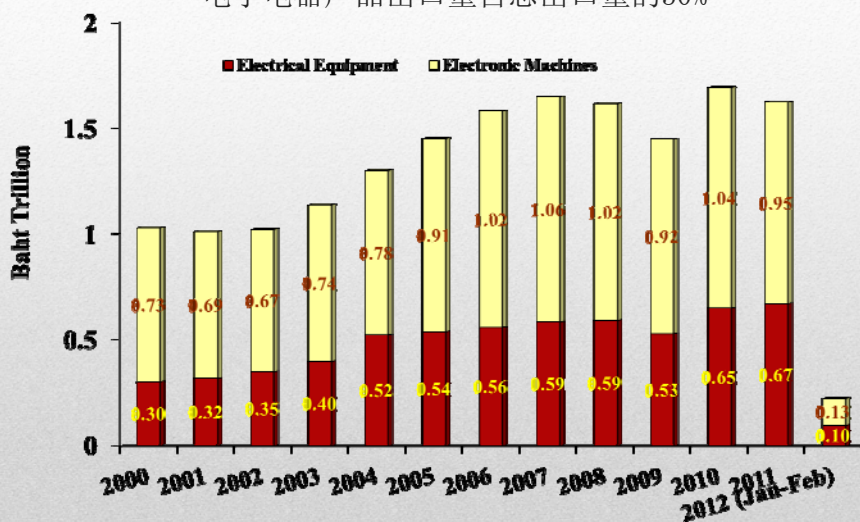
## Foreign Direct Investment Applications 2011-2012 (Jan-June) 外商直接投资申请 2011-2012 (一月-六月)



## Thailand Ranked #15 2011 Automobile Production 2011年泰国汽车产量居世界第15位



**Electronics & Electrical Industry ACCOUNTS FOR 30% OF EXPORTS:**  
 电子电器产品出口量占总出口量的30%



Source: MOC, as of March 29, 2012

**Thailand's Top Food Export Categories and Ranking (2010)**

泰国主要粮食出口排名 (2010)

RICE 大米	Value (US\$ MIL.)	% share
World 全球	16,803	100
<b>1. Thailand 泰国</b>	<b>5,340</b>	31.8
2. Vietnam 越南	3,230	19.2
3. India 印度	2,298	13.7
4. US 美国	2,337	13.9
5. Italy 意大利	650	3.9

FISHERY PRODUCT 水产品	Value (US\$ MIL.)	% share
World 全球	94,993	100
1. China 中国	12,764	13.44
2. Norway 挪威	8,638	9.1
<b>3. Thailand 泰国</b>	<b>6,956</b>	7.3
4. Vietnam 越南	5,034	5.3
5. US 美国	4,435	4.67

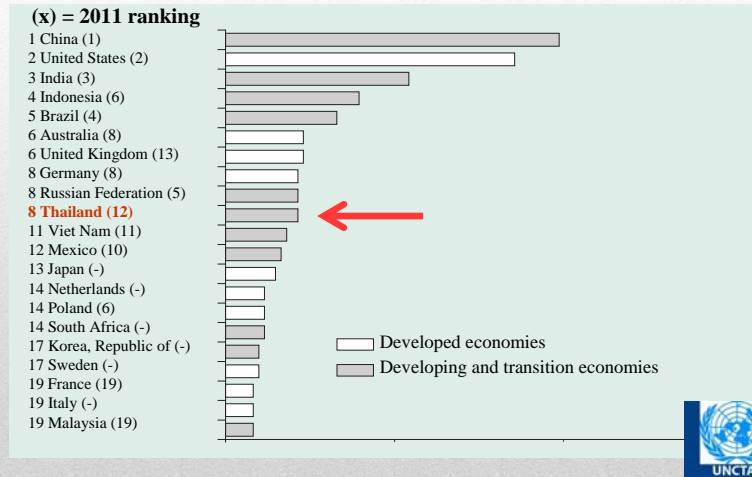
MEAT 肉类	Value (US\$ MIL.)	% share
World 全球	112,593	100
1. Brazil 巴西	13,328	11.83
2. US 美国	13,265	11.78
3. Germany 德国	10,690	9.5
4. Netherlands 荷兰	9,511	8.45
5. Australia 澳大利亚	6,181	5.48
<b>18. Thailand 泰国</b>	<b>1,948</b>	1.73



(Source: www.nfi.or.th as of Nov 29, 2011)

## TNCs' top prospective host economies for 2012-2014

2012-2014年跨国公司预测最有潜力的经济体



Source: UNCTAD Top host economies for FDI 2012-2012 as of July 12, 2012

1	Singapore 新加坡
17	<b>THAILAND 泰国</b>
18	Malaysia 马来西亚
83	Brunei Darussalam 文莱
98	Vietnam 越南
129	Indonesia 印度尼西亚
136	Philippines 菲律宾
138	Cambodia 柬埔寨
165	Laos PDR 老挝

### The World Bank ranks Thailand among the easiest places to do business in Asia and 17<sup>th</sup> in the world

世界银行评定易商环境国家排名  
泰国排在亚洲前列  
并排名世界第17名



Source: Doing Business 2012

## Cost of Living Survey 2012

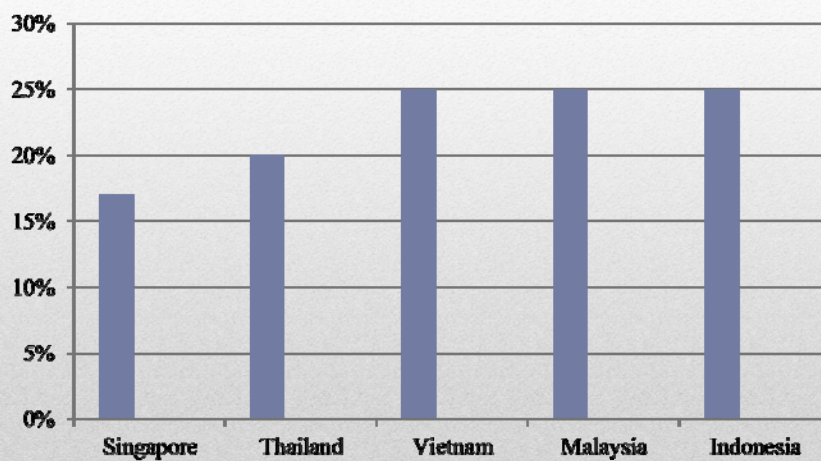
### 2012年生活成本调查

Cities	March 2012
Tokyo	1
Osaka	3
Hong Kong	9
Singapore	6
Beijing	17
Shanghai	16
Jakarta	61
Bangkok	81
Kuala Lumpur	102
Hanoi	136

Source: World Cost of Living Survey 2012, Mercer Human Resource Consulting, as of Jun 13, 2012  
Survey from 214 countries

## ASEAN Corporate Income Tax 2013

### 2013年东盟企业所得税



Source: KPMG

## AEC SNAPSHOT 东盟经济共同体概述



### Macro-Economic Basics

#### 宏观经济基础

**GDP (2011): US\$2,112.4 Bn\***  
国内生产总值(2011):21,124亿美元

**GDP per capita: US\$3,376**  
人均国内生产总值:3,376美元

**GDP Growth: 5.7% and 6.4% in 2011-2012**  
2011-2012年GDP增速:5.7%和6.4%

**Population: 600 million people**  
人口:6亿人

**Area: 4.46 million km<sup>2</sup>**  
面积:446万平方米

Source: Tilleke and Gibbins & IMF Forecast as of April 23, 2012

国际货币基金组织预测



### 4 Potential Routes Connecting GMS Railway Development 2025

#### 4条连接大湄公河次区域线路 2025年铁路发展

- Route 1: Bangkok-Phnom Penh-Ho Chi Minh City-Kunming  
第1线路:曼谷-金边-胡志明市-昆明
- Route 2: Bangkok-Vientiane-Kunming (via Boten/Mohan)-Hanoi/HCMC  
第2线路:曼谷-万象-昆明(途径磨丁/莫汉)-河内/胡志明市
- Route 3: Bangkok-Vientiane-Hanoi/HCMC (via Tha Khaek-Mu Gia-Vung Ang)-Kunming  
第3线路:曼谷-万象-河内/胡志明市(途径他曲-穆嘉关-万安)-昆明
- Route 4: Bangkok-Kunming (via Chiang Rai-Boten-Mohan)-Hanoi/HCMC  
第4线路:曼谷-昆明(途径清莱-磨丁-莫汉)-河内/胡志明市

Existing lines 现有路线  
Missing links 缺失路线

### GMS Rail traffic projections (tons) in 2025

Bulk	11,220,630
Containers	8,250,902
Liquid	6,258,056
Reefer	4,173,152
Special	68,553
<b>TOTAL</b>	<b>29,971,293</b>

- Route 1: Bangkok-Phnom Penh-Ho Chi Minh City-Kunming
  - Route 2: Bangkok-Vientiane-Kunming (via Boten/Mohan)-Hanoi/Ho Chi Minh City
  - Route 3: Bangkok-Vientiane-Hanoi/Ho Chi Minh City (via Tha Khaek-Mu Gia-Vung Ang)-Kunming
  - Route 4: Bangkok-Kunming (via Chiang Rai-Boten-Mohan)-Hanoi/Ho Chi Minh City
- Existing lines  
Missing links

Source: 2010 Year-end Economic Review & NESDB, as of Jun 17, 2011



## High Speed Train (高速列车)



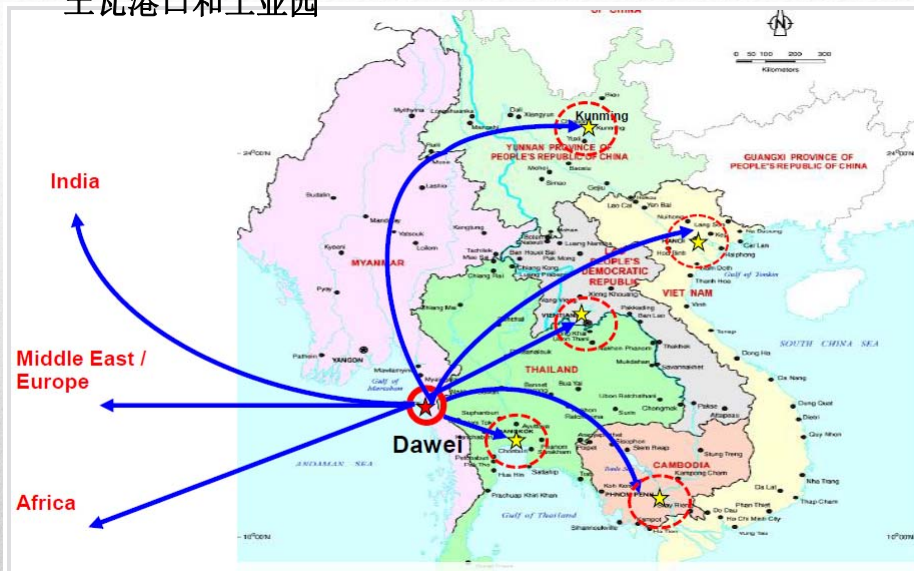
Route 路线	From 至	To 到	Distance 路程	Budget 预算 ( Million US\$ ) ( 百万美元 )
North 北部	Bang Sue 挽是	Chiang Mai 清莱府	745 km. 745公里	7,300
North-East 东北部	Bang Sue 挽是	Nong Khai 廊开府	615 km. 615公里	3,100
East 东部	Makkasan 玛卡讷	Rayong 罗勇府	330 km. 330公里	2,300
South 南部	Bang Sue 挽是	Hua Hin 华欣府	225 km. 225公里	2,600



Source: NESDB, as of March 25, 2011

## DAWEI PORT AND INDUSTRIAL ESTATE

土瓦港口和工业园



## Thailand as Future Investment

泰国-未来投资国家



**Priority Based 优先建立基地**

**Global Connectivity 全球连接性**

**Environmental Sustainability**

可持续性发展环境

**Border Industrial Estate**

工业园区距离近

**Industrial Clustering 产业集群**

**Target industry**  
目标产业



**Investment Strategy 投资策略**



## **Unparalleled Opportunities in Thailand**

无限可能的商机

---