

THAILAND ELECTRICAL AND ELECTRONICS INDUSTRY

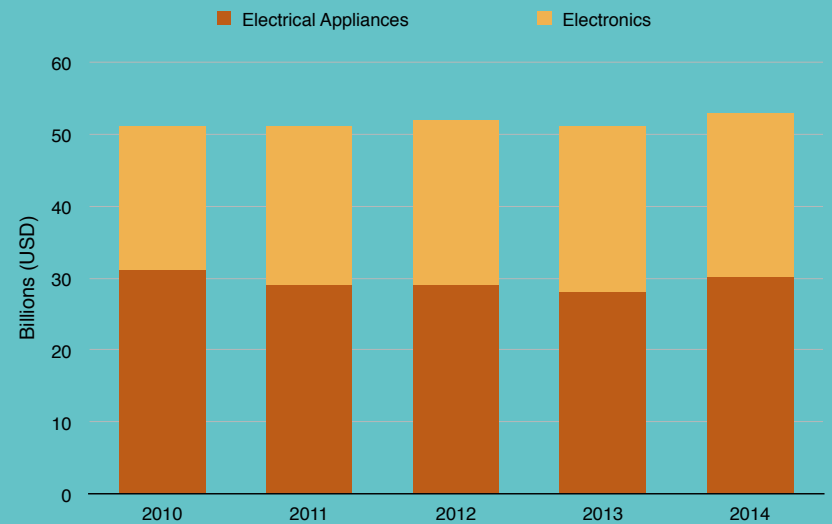


THAILAND: THE WORLD'S ELECTRICAL AND ELECTRONICS INDUSTRY INVESTMENT DESTINATION

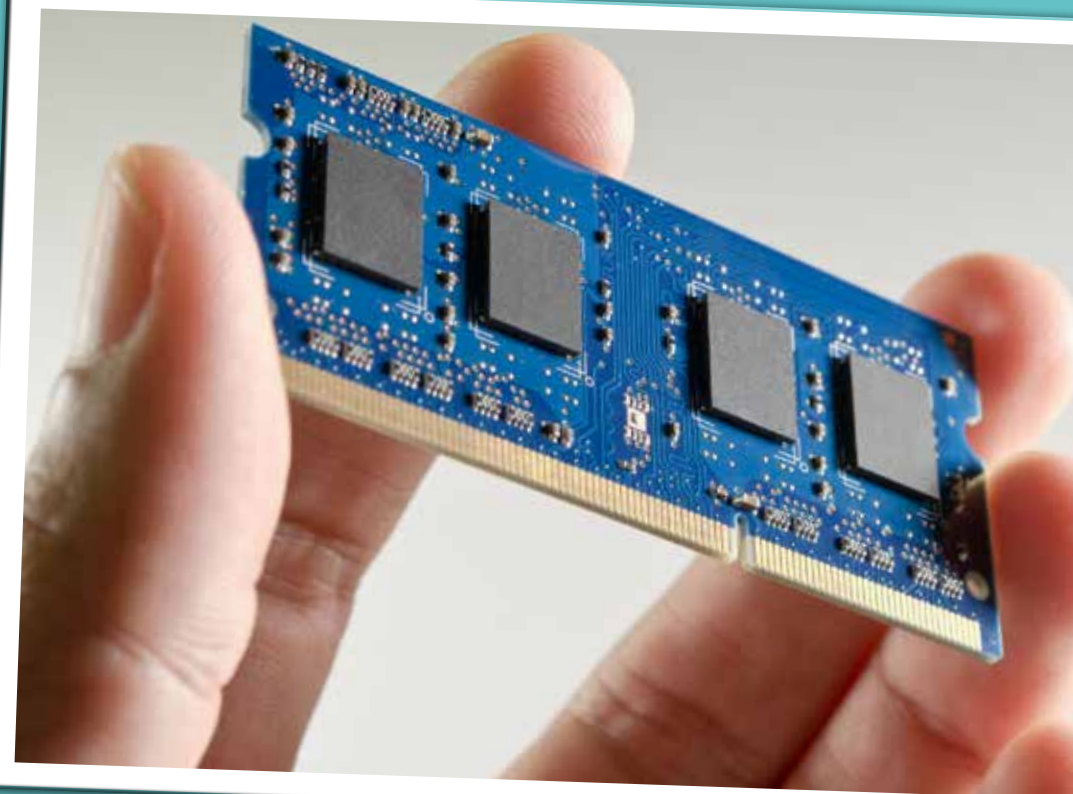
With a total export value of US\$55 billion in 2014, Thailand's electrical and electronics industry has flourished and developed for decades. The electrical and electronics industry has not merely played an important role in Thailand's economy as a main growth driver, but has also made Thailand Southeast Asia's electrical and electronics manufacturing hub. Thailand's government, recognizing the crucial role the electrical and electronics industry will continue to play in Thailand's economic development, offers attractive investment incentives to attract major global players in the electrical and electronics industry.

In 2014, the electrical and electronics industry accounted for 24% of Thailand's annual export revenues. The main export destinations were the USA (17.3%), ASEAN (16.7%), Hong Kong (12.5%), Japan (10%), and China (8.8%). According to the Federation of Thai Industries, electrical and electronics exports are expected to increase by nearly 10% in 2015.

Thailand's Electrical and Electronics Industry Exports, 2010-2014



Source: Thai Electrical and Electronics Institute





ELECTRICAL APPLIANCE INDUSTRY

Thailand is one of ASEAN's largest production centers in the electrical appliances sector and globally recognized for its manufacturing competency. Besides being the world's 2nd largest producer of air conditioning units, Thailand's expertise in refrigerator production is world class. In 2014, the global household appliance manufacturer Arcelik announced it would build its first ASEAN plant in Thailand. The US\$98 million plant will focus on refrigerator production with the goal of producing one million refrigerators annually. Thailand's 2014 electrical appliance exports were valued at US\$23.5 billion and electrical appliance imports totaled US\$17.6 billion in 2014.

Thailand's Electrical Appliances Exports & Imports, 2010-2014



Source: Thai Electrical and Electronics Institute

The Thai electrical appliance industry has experienced steady growth as the global economy continues to recover and demand improves. Thailand's robust manufacturing base and first class infrastructure has made Thailand an ideal location for electrical appliance manufacturing. Proof of Thailand's

attractiveness is evident in the many global electrical appliance manufacturers that already have plants in Thailand, including: Bosch & Siemens, Daikin, Electrolux, Fisher & Paykel, Haier, LG, Panasonic, Samsung, and Toshiba.

Air Conditioner and Refrigerators Exports, 2012-2014



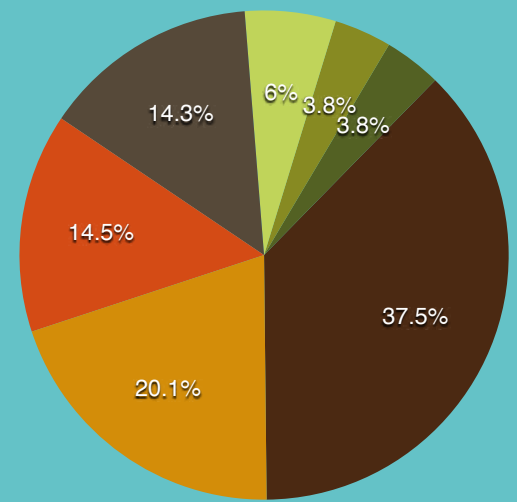
Source: Thai Electrical and Electronics Institute

Based on export values, Thailand's major electrical appliance products were air conditioners and refrigerators. Air conditioner exports accounted for nearly 17% of total electrical appliance exports and refrigerator exports accounted for 6% of total electrical appliance exports.

The major export destinations for Thailand's electrical appliances in 2014 were ASEAN, the USA, Japan, China, and India. ASEAN was the largest export market for Thailand's electrical appliances, with total value of US\$4.3 billion in 2014, a 15% increase from 2013.

Thailand's Major Electrical Appliance Export Markets, 2014

- ASEAN
- USA
- Japan
- China
- India
- Australia
- Others



Source: Thai Ministry of Commerce

ELECTRONICS INDUSTRY

The electronics industry is a core element of the Thai manufacturing sector's success. In 2014, Thailand's overall trade in the electronics industry alone was worth approximately US\$59.5 billion, with export revenues accounting for over US\$32 billion.

Thailand's Electronics Exports and Imports, 2010-2014



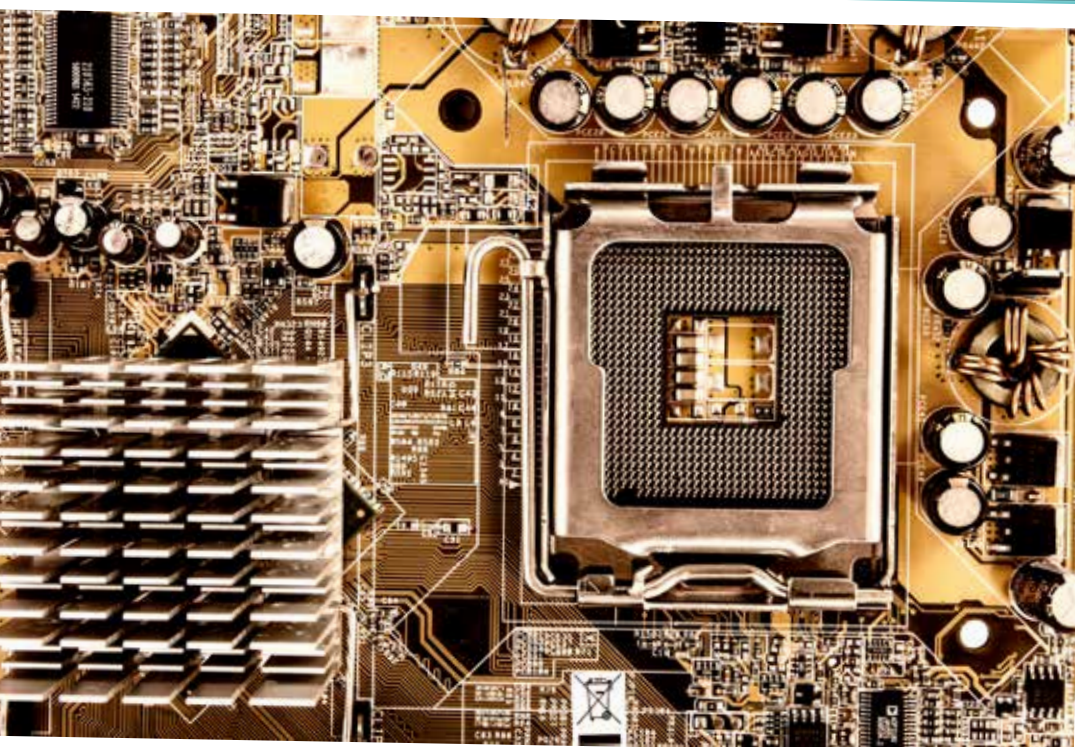
Source: Thai Electrical and Electronics Institute

In 2014, Thailand's main electronics exports were computer components and integrated circuits (IC), which accounted for approximately 56% and 24% of total electronics exports respectively. Having two of the global data storage manufacturers, Western Digital and Seagate, has made Thailand the



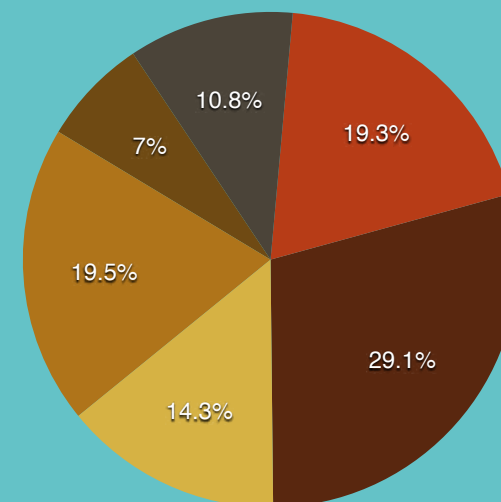
second largest data storage product producer and exporter in the world. At the same time, Thailand holds an equally renowned reputation in the IC and semiconductor sectors due to Thailand being one of the main manufacturing bases for these products in the ASEAN region.

Companies that have already taken advantage of Thailand's dynamic industry include world-class companies: Fujitsu, LG Electronics, Seagate, Sony, Samsung and Western Digital. These companies have established facilities for a diverse scope of purposes, from production and assembly to testing and R&D. Thailand's electronics industry, embracing the new digital age boom, has seen exports rise to US\$32 billion in 2014. The primary markets for these exports were the USA (19.5%), Hong Kong (19.3%), ASEAN (14.3%), China (10.8%) and Japan (7%). Increasing demand for electronics saw imports rise to US\$27 billion with mainly printed circuits and IC being imported to supply Thailand's increasingly advanced electronics manufacturing ecosystem.



Thailand's Major Electronics Export Markets, 2014

ASEAN USA Japan China Hong Kong Others



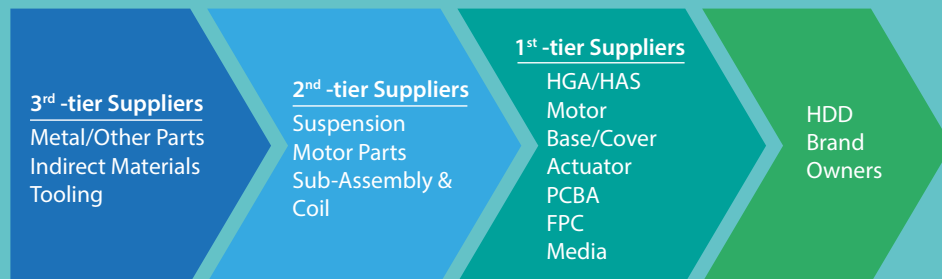
Source: Thai Ministry of Commerce

Automatic Data Processing Machines (including HDD)

Having long been a cornerstone for an automatic data processing machine industry, Thailand is one of the largest global producers and exporters of automatic data processing machines. In 2014, Thailand's exports totaled US\$12 billion and grew by 7% from 2011.

The competitiveness of Thailand's HDD industry is based on its world class industrial clusters containing supporting industries that manufacture most of the components utilized in the assembly of HDDs. Concentrated in the country's central and northeastern regions near Bangkok, Thailand's HDD clusters provide premiere efficiency, cost-savings, and readily-available expertise synergies. Within the clusters, HDD producers in Thailand are divided into different tiers, as illustrated below:

Thailand's Hard Disk Drive Cluster



Source: Hard Disk Drive Institute

Key Players in HDD Assembly and Components in Thailand:

HDD-Part Producers:

- *Alps Electric*
- *Hutchinson Technology*
- *Magnacomp Precision*
- *Minebea*
- *NHK*
- *Nidec*
- *Nitto Denko*
- *Seiko Instruments*

HDD Producers:

- *Seagate*
- *Western Digital*

Integrated Circuits (IC)

Integrated circuits are Thailand's largest electronics import and second largest electronics export. According to Thai Electrical and Electronics Institute, The value of ICs imported into Thailand in 2014 reached nearly US\$10 billion and exports reached nearly US\$8 billion. Ranked in order of importance, the major export markets for Thailand's ICs in 2014 are: Hong Kong, Taiwan, Singapore, and China. The continued miniaturization of electronic devices from smartphones to wearables ensures increased demand for integrated circuits and profitable opportunities in Thailand for investors.

Key Players in the IC cluster in Thailand:

IC Design:

- *Rohm LSI*
- *Silicon Craft Technology*

Lead Frame:

- *Rohm Mechatech*
- *SumikoLeadFrame*
- *TSP-T*
- *Yamakin*

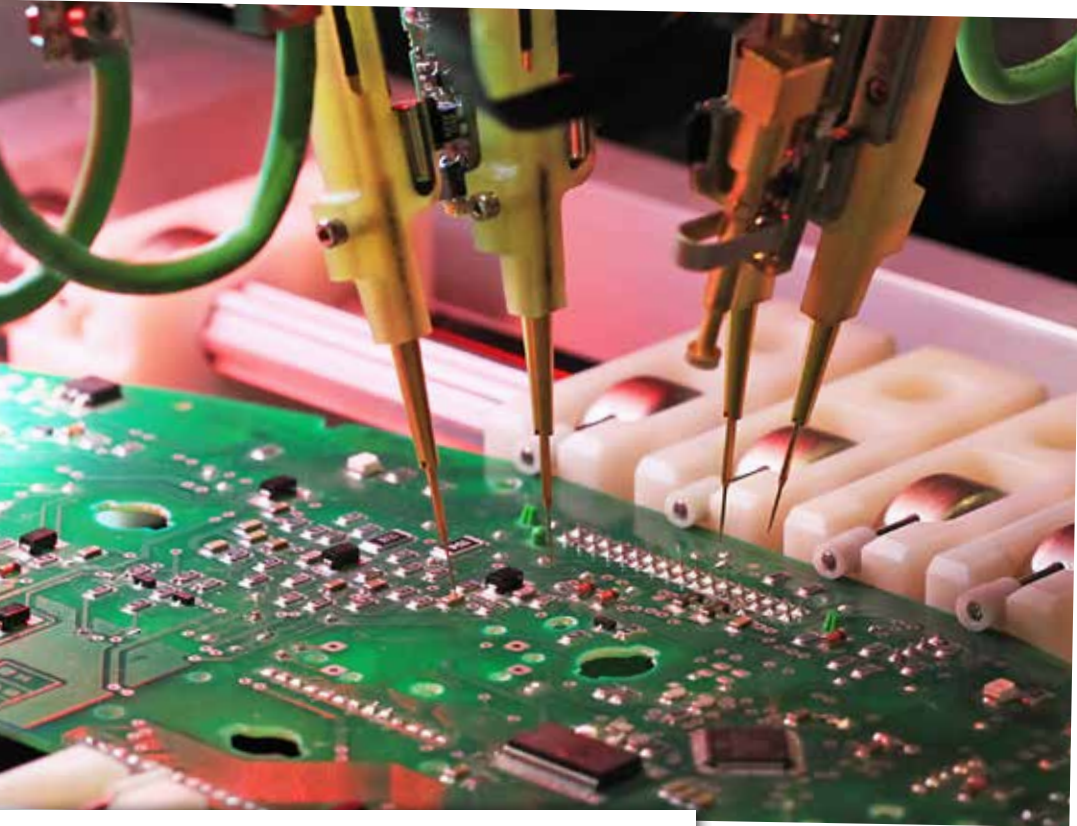
Testing:

- *Microchip*
- *Maxim Integrated*

Assembly:

- *Allegro Microsystem*
- *Circuit Electronics*
- *Hana Semiconductor*
- *Microchip*
- *NXP*
- *Spansion*
- *Millennium Microtech*
- *Rohm Integrated System*
- *Sony Device Technology*
- *Stars Microelectronics*
- *Thai NJR*
- *Toshiba Semiconductor*
- *UTAC Thai*





OPPORTUNITIES

IC and Data Storage

Due to recent technological innovations, the integrated circuit market has witnessed continued growth. Integrated circuits are an integral component of smartphones, a now ubiquitous market that is expected to be worth US\$1 trillion in 2015. Not only do integrated circuits play a central role in smartphones and tablets, but they power the next generation of smart devices as well. The arrival of next generation web connected electronics, wearable devices and Internet of Things (IoT) devices, means integrated circuits will continue to see increased growth and greater demand. The global integrated circuit market is forecast to reach US\$379 billion in 2019 due to the increasing blending of everyday devices with Internet connectivity.

Although Thailand's electronics market is well developed, the production of integrated circuits remains an opportunity for manufacturers. Integrated circuits are still mainly imported from China, the USA, Korea, Taiwan, and Japan. In 2014, Thailand imported nearly US\$10 billion worth of integrated circuits. A limited supply of locally produced integrated circuits provides opportunities for manufacturers to access a new, profitable market by producing integrated circuits in Thailand that can satisfy the demands of the local electronics sector. In addition, IC design and related activities offers a burgeoning field of opportunity, particularly in wafer design, where there is plenty of room for growth. The Thai government awards generous incentives to foreign investors that will tap into Thailand's highly advanced technology to produce and design the integrated circuits that will power the next generation of smart devices.

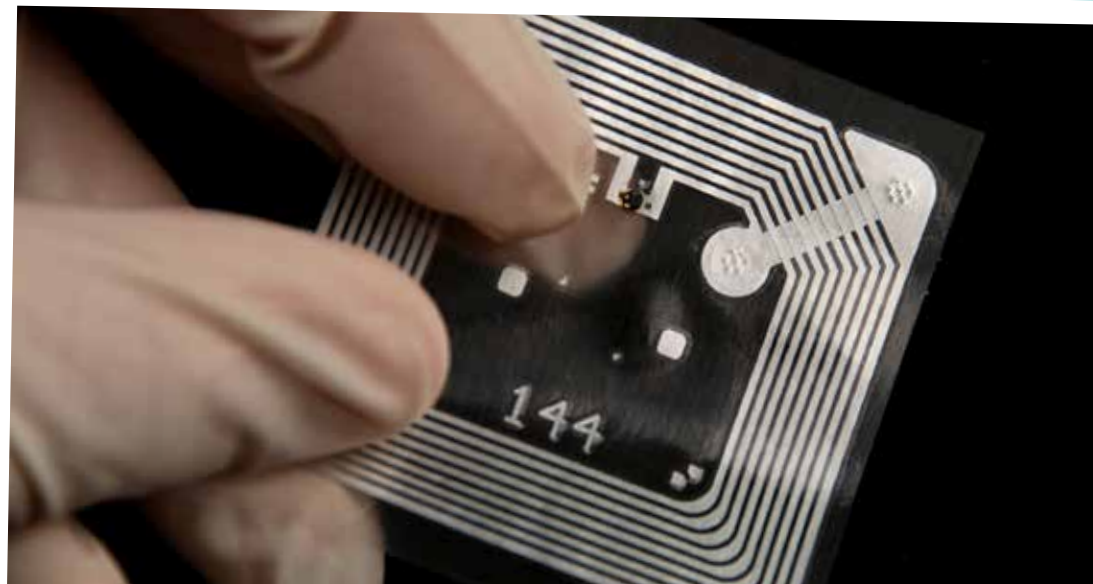
As the leading global HDDs and components producer, Thailand's suppliers benefit from first class industrial clusters and government support. The Thai government's continued commitment in supporting Thailand's HDD industry is apparent in its continued investments in research programs designed to spur HDD technological enhancements. As a result of Thailand's world-class industry clusters, world players in the HDD manufacturing industries can all be found in Thailand.

Technological innovations in the consumer and enterprise sectors have produced next generation of HDD and newer data storage techniques such as Solid State Drives (SSD) and Solid State Hybrid Drives (SSHD). Thailand's decades of experience in data storage technology and expertise derived from its years as a central hub of data storage production makes Thailand an ideal location for the production of next generation data storage solutions.

RFID

Thailand's prowess at electronics reaches the radio-frequency identification (RFID) technology industry as well. RFID technology is playing an increasingly important role in various industries worldwide, from organizing warehoused inventories to tagging livestock. The RFID Institute, a joint public-private sector research institute was established in 2009 as a test bed center working with private companies to design state of the applications and technologies for various industries including: security, logistics, healthcare, retail, and transportation.

The global RFID market was valued at US\$8.9 billion in 2014, a 16% increase from 2013 and a 29% increase from 2012. The market is forecast to reach US\$27.31 billion by 2024. In 2014, a total of 6.9 billion RFID tags were sold worldwide. RFID technology's usage will be seen in practically every industry as companies rely more and more on digital solutions to streamline operations and improve their bottom line. Technology companies that have already tapped into Thailand's advanced RFID capabilities include: Datamars, Hana Microelectronics, Smartrac Technology, and Sumida Electric.



Automotive Electronics

As the largest automotive production center in ASEAN, opportunities in Thailand's automotive electronics market is increasingly visible as Thailand pushes to become one of the top global eco-car manufacturing centers.

Electronics have become an indispensable element of the modern automobile. Electronics and electronic systems have improved a range of automobile elements including: safety, fuel efficiency, performance, and comfort. Furthermore, the current trends of alternative fuel vehicles, increased fuel efficiency, and stricter emissions standards, are increasingly spurring demand for automotive electronics. The value of global automotive electronics is forecast to reach US\$314.4 billion within 2020.

The need for cutting edge automotive electronics has dramatically increased in order to satisfy the demand for "smart" vehicles. Automotive electronic components are present in various systems including: power or engine controlling systems, security, safety systems, driver assistance, diagnostic systems, passenger comfort, information systems, and in-car entertainment. Automotive electronics companies that have already taken advantage of Thailand's established automotive industry include: Calsonic Kansei, Delta Electronics, Hitachi Automotive Systems, Omron Automotive Electronics and Sumitomo Electric Wiring Systems.



WHY THAILAND?

Thailand possesses various advantages for electrical appliance and electronics producers. These include:

Competitive workforce

Currently, over 600,000 people are employed in Thailand's electrical and electronics sector. Foreign investors are often drawn to Thailand due to the cost effective, highly skilled workforce. Over 60 public and private engineering institutes across the country are accredited by the Council of Engineers.

The Thai government recognizing the importance of the electronics and electrical industry to Thailand's economy has established various programs to ensure the competitiveness of Thailand. To ensure a stable pool of qualified workers for the industry, Thailand has developed an intricate network of research centers and institutes that offer resources for technical training including:

- » The National Science and Technology Development Agency in 4 areas:
 - Hard Disk Drive Industry Research Program
 - Air-Conditioning and Refrigerator Industry Program
 - Automotive and Automotive Parts Industry Program
 - Thailand Electronics Design Industry Human Resource Development Project





- » Asia Institute of Technology in 2 areas:
 - Microelectronics and Embedded System Program
 - Mechatronics Program
- » King Mongkut's Institute of Technology in 3 areas:
 - Electrical and Electronic Products Testing Center (In Cooperation with NSTDA)
 - Data Storage and Technology and Applications Research Center
 - College of Data Storage Innovation
- » Khon Kaen University in 2 areas:
 - Khon Kaen University – Seagate Cooperation Research Laboratory
 - Magnetic Materials & Data Storage Research Laboratory

“Seagate continues to invest in Thailand for three reasons - it has strong teams, both technical and operating, Asia is a high-growth market for data storage, and the cost structure for professionals, both engineers and technicians, is still good. Thailand is in a great location with good logistics to access other countries in Asia, especially China and India, as well as the rest of the world.”

-Mr. Jeff Nygaard, Senior Vice President of Global Head Operations at Seagate Technology-

- » NECTEC's Industry/University Cooperative Research and Development Units in 4 areas:
 - Advanced Automation and Electronics Research Unit – Embedded System Technology Laboratory and Industrial Control and Automation Laboratory
 - Engineering and Innovation Development Unit – Industrial Prototype and Product Development Laboratory
 - RFID Institute
 - The Thai Microelectronics Center (TMEC)
- » King Mongkut's University of Technology in 7 areas:
 - Electronic and integrated circuit design research
 - Robotics and automation research
 - Precision engineering research
 - Foundry engineering research
 - Moulds and dies design research
 - Research Center of Air Conditioning and Refrigeration
 - Electronics and Microprocessor Laboratory

Access to markets

In order to enhance global commerce opportunities, Thailand has bilateral free trade agreements with many countries, including Japan, India, China, Australia, and New Zealand. Thailand is also currently in the process of establishing free trade agreements with the European Union, Canada, Turkey, and Chile. As a member of ASEAN, Thailand participates in multilateral free trade agreements with China, South Korea, Australia, New Zealand, India, and Japan. Furthermore, the ASEAN Free Trade Agreement (AFTA) has expanded Thailand's market to include the 10 member states of ASEAN that collectively comprise a market of 600 million consumers.

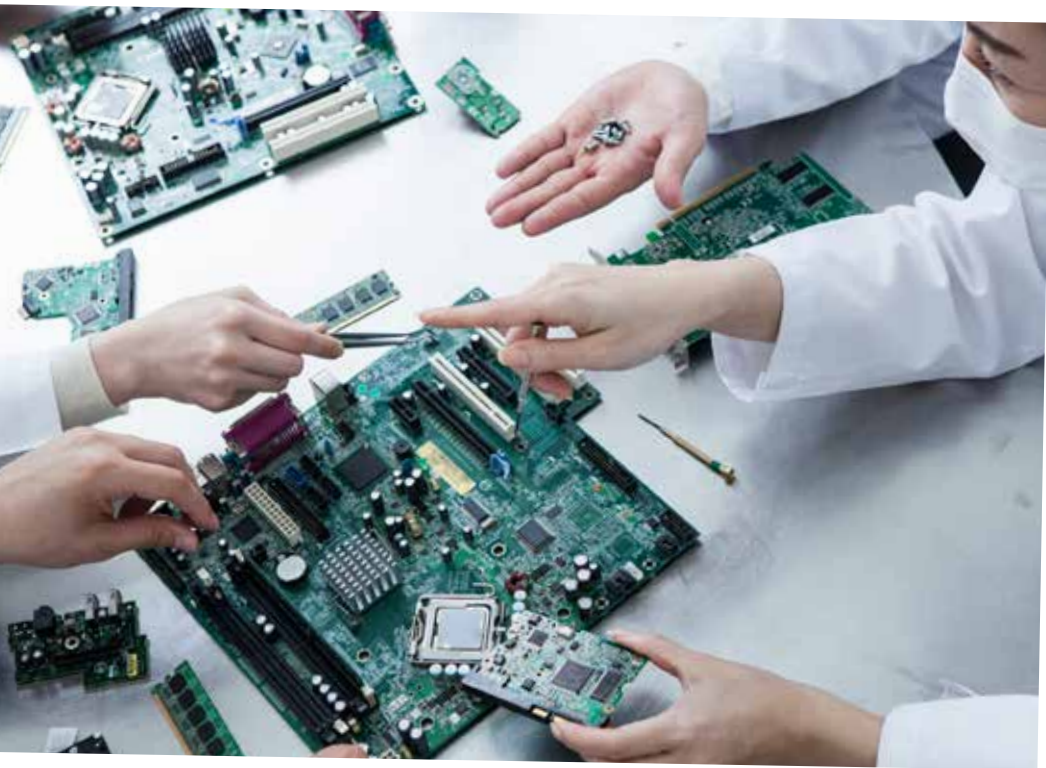
The establishment of the ASEAN Economic Community (AEC) in 2015 will fully integrate this US\$2 trillion market into the global economy. This new economic bloc with streamlined movement of goods, services, and investment capital will provide unparalleled opportunities for manufacturers.

“Commencing in 2015, the AEC will expand export opportunities for electrical & electronics manufacturers located in Thailand via access to an economic bloc with a consumer base of over 600 million individuals. Manufacturers also benefit from manufacturing clusters, government research programs, and incentives devoted to the electrical & electronics industry.”

-Mr. Somboon Hotrakool, President of Electrical and Electronic Institute-

Excellent logistics systems

Thailand is a transportation hub of the ASEAN region. The country provides world-class infrastructure along with cost effective logistics. Thailand's extensive road and rail networks span the nation, facilitating access to nearby countries. Bangkok's Suvarnabhumi International Airport and Laem Chabang deep-sea port are globally recognized gateways of global logistics. Thailand offers manufacturers a geographically accessible and logistically convenient location.



Electronics clusters

The establishment of electronic clusters has been a key method of leveraging the capabilities of firms that comprise Thailand's electronics industry. Proximity between firms and their input suppliers within the clusters enhances communication and facilitates flow of goods while providing an environment that promotes technology innovation and improved efficiencies. Another attractive aspect of the electronics cluster is streamlined supply chain management, which allows for reduced logistics costs. Manufacturers also benefit from shared core technological innovations and human resource development programs.



DEVELOPED NETWORK OF SUPPORTING ORGANIZATIONS

Government organizations supporting the growth and competitiveness of the electrical and electronics industry in Thailand include:

The Electrical and Electronics Institute (EEI):

Founded in 1998, the EEI is an autonomous institute under the supervision of the Ministry of Industry. It promotes and supports the development and export of electrical and electronic products, as well as serves as a center of information for the industry.

The National Electronics and Computer Technology Center (NECTEC):

The National Electronics and Computer Technology Center (NECTEC) is a statutory government organization under the National Science and Technology Development Agency (NSTDA), Ministry of Science and Technology. Its main responsibilities are to undertake, support, and promote the development of electronics and computer technologies through research and development activities. NECTEC also provides linkage between research communities and industries through the established industrial clusters.

Research Centers:

The Thailand Science Park was established by the Ministry of Science and Technology to be the national hub for private sector industrial R&D activities.

The park is under the management of the National Science and Technology Development Agency (NSTDA). The park provides services ranging from technology transfer from universities and technology centers, to financial assistance and business incubation. The National Electronics and Computer Technology Center is located in the park allowing for unparalleled opportunities for R&D collaboration.



Thai Organic and Printed Electronics Innovation Center (TOPIC):

TOPIC was established for the purpose of spearheading Thai innovation and development in the next generation of organic and printed electronics (OPE). Located in Thailand Science Park, TOPIC was designed as an R&D hub to spur domestic innovation and entrepreneurship. TOPIC's research targets include organic light-emitting diode (OLED) and smart panel displays, printed sensors, screen printing, roll-to-roll printing, smart tags, and functional organic materials.

Thai Embedded Systems Association:

The Thai Embedded Systems Association is a national organization devoted to the furthering of the development of the electronics design industry in Thailand. Along with the National Science and Technology Development Agency and the Board of Investment, the Thai Embedded Systems Association is a partner in the Thailand Electronics Design Industry Human Resource Development Project. The goal of the project is to produce skilled and innovative engineers supply pool for the Thailand's electronics industry.

BOI INVESTMENT INCENTIVE

materials, and corporate income tax exemption of up to eight years. Non-tax incentives include permission to bring in expatriates, own land and take or remit foreign currency abroad.

Promoted projects in many activities in the electronics and electrical appliances industry receive an 8-year corporate income tax holiday, exemptions of import duty on machinery and import duty on raw or essential materials used in manufacturing export products, as well as non-tax incentives.

- Electronics design and embedded system design
- Manufacture of organics and printed electronics (OPE) and parts for organics and printed electronics (OPE)
- Manufacture of electronic control and measurement instruments for industrial/agricultural use and parts electronic control and measurement instruments for industrial/agricultural use
- Manufacture of emission, transmission and reception devices used in fiber-optic and wireless communications systems and parts for emission, transmission and reception devices used in fiber-optic and wireless communications systems
- Manufacture of solar cells and/or raw materials for solar cells
- Manufacture of security control equipment and parts for security control equipment
- Manufacture of solid state drives and/or parts for solid state drives
- Manufacture of advanced technology hard disk drives and/or parts
- Manufacture of wafers

Additional information about specific manufacturing activities relating to automotive industries can be found on the BOI website or by contacting the BOI's Investment Promotion Bureau 3.

FOR FURTHER INFORMATION

The Thailand Board of Investment (BOI): www.boi.go.th

Electrical and Electronics Institute: www.thaieei.com

National Electronics and Computer Technology Center (NECTEC):
www.nectec.or.th

Electronic & Computer Employers' Association: www.eceathailand.com

Thai Organic & Printed Electronics Innovation Center: www.topic.in.th

Thai Embedded Systems Association: www.tesa.or.th

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