

Think Asia, Invest Thailand

迈向亚洲，投资泰国



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Thailand Board of Investment (BOI)
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泰国投资委高级顾问
阿查瑞·帕塔拿潘猜女士
2011年7月21日 河北

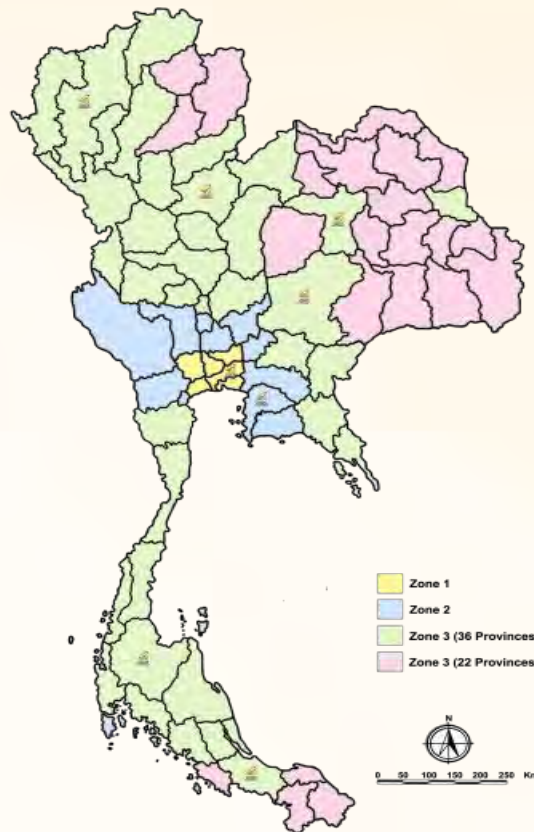
Outline of Presentation

提纲

- **Thai Economy in Brief: 泰国经济简介**
- **Why Thailand and Global Rankings: 选择泰国的原因以及泰国在全球排名**
- **BOI Investment Policy: 投资委政策**
- **Recent Investment Trend: 近期投资趋势**
- **BOI Services: 投资委服务**
- **BOI Fair 2011: 2011年泰国投资委博览会**

Thai Economy in Brief

泰国经济简介



Thailand's Fast Facts 泰国概况

(1 RMB = 4.6 THB 1人民币 = 4.6 泰铢)

Thai population 泰国人口	67 million 6,700万 (2010)
Thailand's GDP 泰国国内生产总值	2,196.3 billion Yuan(2010) 21,963 亿元
Thai labor force 泰国劳动力	38.6 million 3,860万 (2010)
Thai exports 泰国出口总值	1,342.7 billion Yuan (2010) 13,427 亿元
Thai imports 泰国进口总值	1,269.43 billion Yuan (2010) 12,694.3 亿元
GDP per capita (Yuan per year) 人均国内生产总值 (元/年)	31,220.2 Yuan (2010) 31,220.2 元/年

Economic Projection of 2011

2011年经济预测

	2009	2010	2011 Q1	2011F 2011年预测
GDP Growth (at current price, %) 国内生产总值增长率 (按当前指数, %)	-2.3	7.8	3.0	3.5-4.5
Export Growth rate (%) 出口增长率 (%)	-14.0	28.5	28.3	12.5
Import Growth rate (%) 进口增长率 (%)	-25.2	36.8	28.0	14.6
Trade balance (Bil. US\$) 贸易平衡 (顺差, 十亿美元)	19.4	12.9	2.7	11.2
Private Investment (at constant price, %) 私人投资 (按当前指数, %)	-13.1	13.8	12.6	8.5
Private Consumption (at constant price, %) 私人消耗 (按当前指数, %)	-1.1	4.8	3.4	4.0
Inflation – CPI (%) 总通胀率-居民消费价格指数 (%)	-0.8	3.3	3.0	2.8-3.8

Top 10 Exports in 2008 – 2011 (Jan - May)

2008-2011年（一月至五月）泰国十大出口产品

Unit: Billion USD 单位：十亿美元	2009	2010	2010 (Jan-May) (一至五月)	2011 (Jan-May) (一至五月)	Growth (yoy) 同比
Automatic data processing machines and parts thereof 自动信息处理机及其零配件	16.02	18.84	7.56	7.44	-1.63
Motor cars, parts and accessories 摩托车及其零配件	11.12	17.71	6.95	7.15	2.85
Precious stones and jewelery 珠宝	9.76	11.65	4.58	5.54	20.84
Rubber 橡胶	4.30	7.89	2.90	5.48	89.17
Polymers of ethylene, propylene, etc in primary forms 乙烯与丙烯等初级聚合物	4.46	6.34	2.30	3.69	59.98
Chemical products 化工产品	4.46	5.77	2.21	3.41	54.42
Integrated circuits 电子集成电路	6.44	8.06	3.00	3.34	11.01
Rubber products 橡胶制品	4.48	6.43	2.44	3.26	33.37
Refine fuels 提炼燃料	5.42	7.07	2.39	3.19	33.37
Rice 大米	5.04	5.34	2.02	2.89	42.72
Others 其他	80.89	100.17	38.62	48.53	25.65
Total 总计	152.43	195.31	74.99	93.90	25.22

Source: MOC, as of July 13, 2011 数据来源：泰国商务部，2011年7月13日

Top 10 Imports in 2008 – 2011 (Jan - May)

2008-2011年（一月至五月）泰国十大进口产品

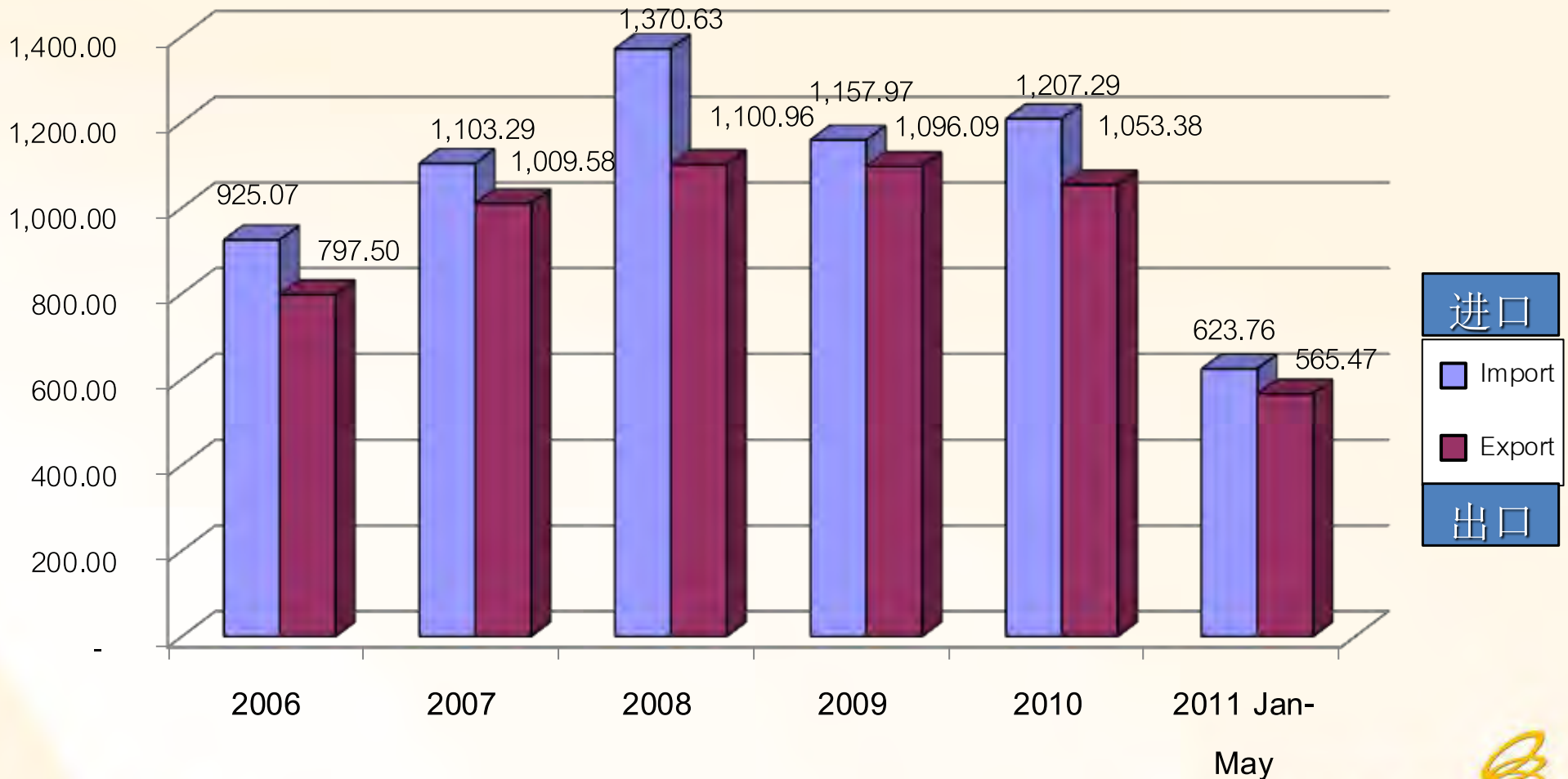
Unit: Billion USD 单位：十亿美元	2009	2010	2010 (Jan-May) (一月至五月)	2011 (Jan-May) (一月至五月)	Growth (yoy) 同比
Crude oil 原油	19.11	23.90	9.06	13.47	48.68
Machinery and parts 机械及其零配件	12.07	16.72	6.35	7.42	16.88
Chemicals 化工产品	8.66	12.58	5.05	6.38	26.30
Jewelry /precious metal 珠宝	5.47	9.87	4.53	5.87	29.40
Electrical machinery and parts 电子机械及其零配件	9.39	12.16	4.60	5.52	19.98
Iron, steel and products 钢铁产品	7.38	11.72	4.45	5.51	23.95
Integrated circuits 电子集成电路	8.10	10.76	4.25	4.68	10.08
Other metal ores, metal waste scrap, and products 其他金属原矿、废料及产品	4.74	7.51	2.88	3.79	31.46
Computers, parts and accessories 电脑及其零部件	6.82	8.14	3.35	3.64	8.49
Parts and accessories of vehicles 汽车零配件	3.37	5.91	2.13	2.50	17.77
Others 其他	48.49	63.08	24.42	32.95	34.94
Total 总计	133.66	182.40	71.07	91.72	29.07

Source: MOC, as of July 13, 2011 数据来源：泰国商务部，2011年7月13日

Trade Summary between Thailand / China

泰中贸易概要 (1 USD = 6.8 RMB 1美元=6.8人民币)

单位：亿元 100 Million Yuan



SOURCE : INFORMATION AND COMMUNICATION TECHNOLOGY CENTER WITH COOPERATION OF THE CUSTOMS DEPARTMENT AS OF July 13, 2011

资料来源：信息和通讯技术中心与海关总署汇总资料，2011年7月13日

Top 5 Export Items to China from Thailand 2008-2011 (Jan-May)
 2011年(一月至五月)泰国出口到中国的前五类产品 (1 USD = 6.8 RMB 1美元=6.8人民币)

Unit: Billion Yuan 单位: 十亿元	2008	2009	2010	2010 (Jan-May) (一至五月)	2011 (Jan-May) (一至五月)	Growth (yoy) 同比
Automatic data processing machines and parts thereof 自动信息处理机及其零配件	32.78	29.43	34.25	14.68	12.91	-12.08
Rubber 橡胶	13.18	10.57	16.63	5.86	11.39	94.39
Chemical products 化工产品	5.56	9.25	12.17	4.55	6.38	40.38
Polymers of ethylene, propylene, etc in primary forms 乙烯与丙烯等初级聚合物	7.31	7.36	11.09	3.74	6.05	61.92
Rubber products 橡胶制品	3.27	5.33	9.60	3.92	5.29	35.06
Others 其他	48.00	47.68	62.26	23.80	27.73	16.52
Total 总计	110.10	109.61	146.02	56.55	69.76	23.37

Top 5 Import Items from China to Thailand 2008-2011 (Jan-May)

2011年(一月至五月)泰国从中国进口的前五类产品 (1 USD = 6.8 RMB 1美元=6.8人民币)

Unit: Billion Yuan 单位: 十亿元	2008	2009	2010	2010 (Jan-May) (一月至五月)	2011 (Jan-May) (一月至五月)	Growth (yoy) 同比
Computers, parts and accessories 电脑设备及其零配件	18.94	18.45	22.92	9.00	10.89	21.05
Electrical Machinery and parts 电子机械及其零配件	16.15	16.65	21.90	8.23	10.72	30.24
Electrical Household appliance 家用电器	12.32	11.21	14.57	5.29	8.25	56.13
Machinery and parts 机械及零配件	11.00	9.48	14.54	5.79	7.41	27.99
Chemicals 化工产品	9.97	7.78	11.44	4.32	6.18	43.13
Others 其他	68.68	51.93	79.47	29.75	38.45	29.21
Total 总计	137.63	115.80	164.83	62.38	81.90	31.30

Why Thailand and Global Rankings

选择泰国的原因及泰国全球排名

Thailand ranks third in all of Asia

泰国经商便利度位列亚洲第三

Ease of Doing Business Index
经商便利度指数

Singapore
新加坡



Rank 1
排名第一

Hong Kong
香港



Rank 2
排名第二

Thailand
泰国



Rank 3
排名第三

Thailand is easier to do business in 泰国拥有较高的经商便利度

Ease of Doing Business Index
经商便利度指数

China

中国



Rank 79

排名79

India

印度



Rank 135

排名135

Thailand

泰国



Rank 19

排名19

Making Thailand the Best Expat Experience

让泰国成为外籍人士最佳的目的地

Top Destinations for
Expat Experience 2010

2010年前十位最受外籍人士青睐的国家

1. **Thailand** 泰国
2. Canada 加拿大
3. Bahrain 巴林岛
4. Spain 西班牙
5. South Africa 南非
6. France 法国
7. Bermuda 百慕大
8. Australia 澳大利亚
9. Malaysia 马来西亚
10. Switzerland 瑞士



**Infrastructure and
Quality of Life
公共设施和生活质量**

INFRASTRUCTURE 基础设施

Transportation 交通运输

- National highway system: connecting all provinces : *connections into Cambodia, Laos, Vietnam, southern China*
国际高速公路网：覆盖泰国各府，对外延伸至柬埔寨、老挝、越南和中国。
- 7 International airports : *total capacity to support 8,500 arrival and 9,300 departure passengers per hour*
七个国际机场：每小时可同时接待入境旅客8,500人次和离境旅客9,300人次。
- Rail system: *linking to Malaysia & Singapore* 铁路系统：联通至马来西亚和新加坡
- Bangkok Mass Transit : *Sky train and Subway -Expansion plan for 137 km. during 2006-2012*
曼谷轨道交通：预计在2006-2012年间扩建轻轨与地铁共137公里。
- Shipping: *6 deep sea ports and 2 international river ports*
水运系统：六大深水海港和两大国际河港
 - ✓ *Including container, tank farms and liquid jetties* 包括集装箱、油罐和液体码头
 - ✓ *Automotives* 全自动数控
 - ✓ *e-Customs facilities* 电子海关



High-Speed Rail 高速铁路

September 14, 2010 2010年9月14日

The Cabinet approved and gave consent to a coordinating committee to consider the implementation of PPPs and conduct a market sounding session for high speed rail projects.

为实现PPPs，泰国内阁批准成立一个协调委员会举办高速铁路建设的市场探索会议。

December 2, 2010 2010年12月2日

The Government organized a market sounding session for the development of two initial HSR projects: Northern route (Bangkok-Chiangmai) and Eastern route (Bangkok-Chachoengsao-Rayong).

政府举办两大高速铁路建设的市场探索会议：北线（曼谷-清迈）和东线（曼谷-北柳-罗勇）

For further information, please contact www.sepo.go.th.

更多信息，请查询网站www.sepo.go.th.

Thailand – China Railway Cooperation

泰-中高速铁路携手合作

Bangkok – Nong Khai – Vientiane – Kunming
曼谷-廊开-万象-昆明

- Total Distance 1,743 km
总长1,743公里
- Maximum speed at least 250 km/hr
最高时速可达每小时250公里
- Running on the new dedicated tracks has been proposed
扩建新的路线计划已经提出

Current Situation:

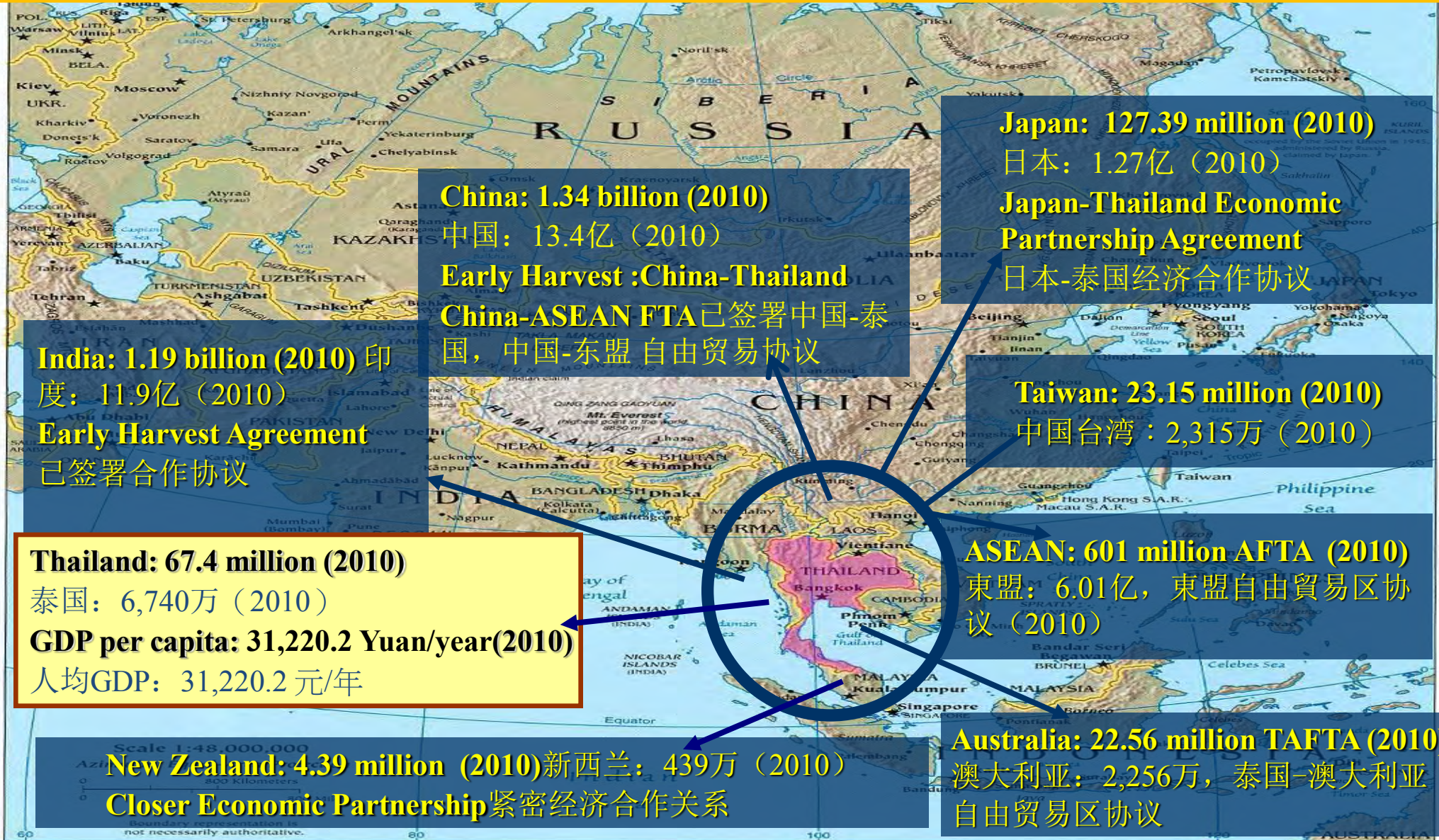
Prepare for MOU between The Ministry of Transport of Thailand and The Ministry of Railways of the PRC on cooperation in railway development and negotiation process.

现况简介:

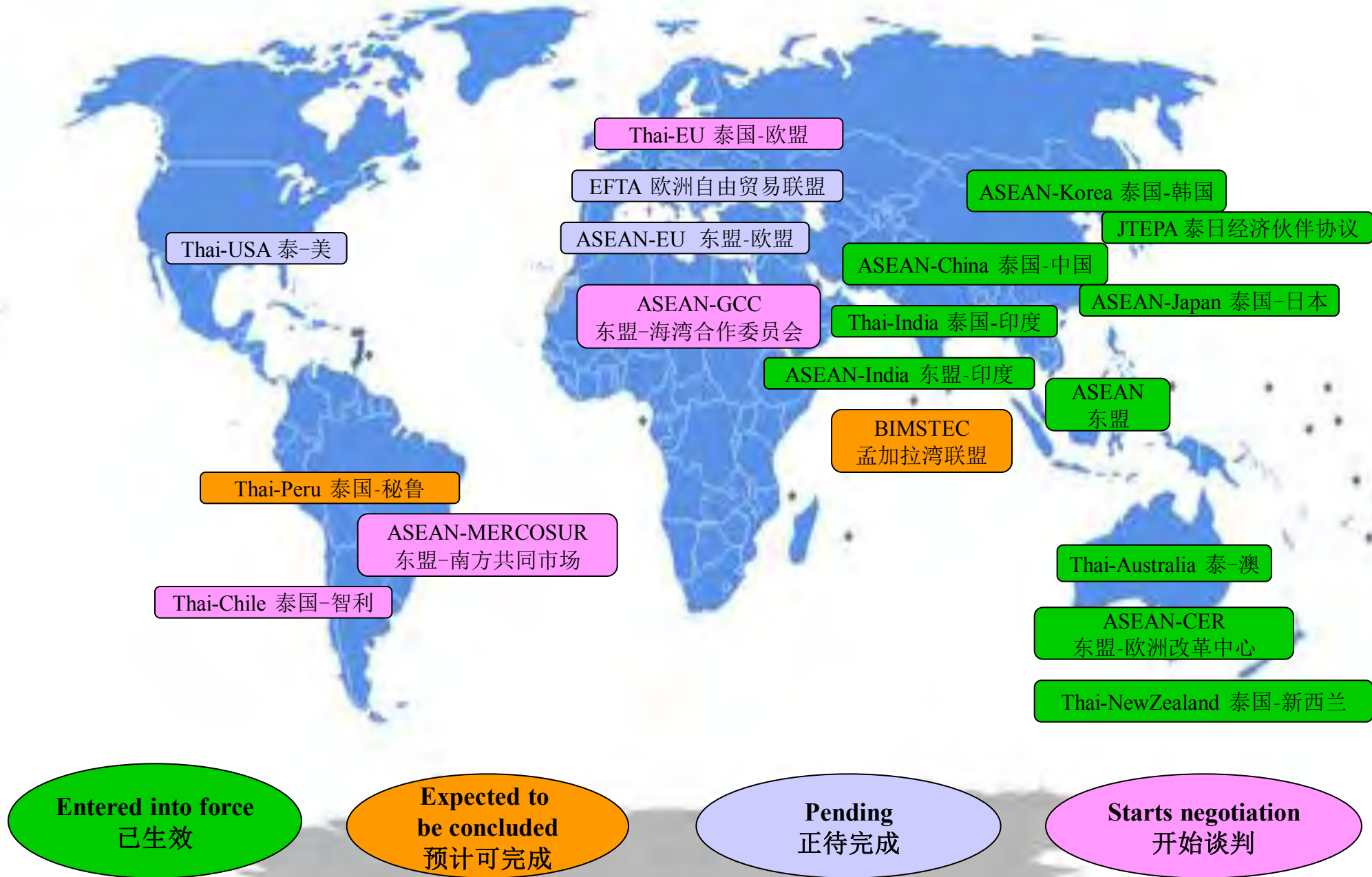
泰国交通运输部与中国铁道部双方共商高速铁路发展计划，并将谈判协商等项目提上议事日程。



Hub of Access to Regional Markets 进入区域市场的中心 (Countries and populations 国家地区及其人口)



An Expanding FTA Regime 不断增多的自由贸易联盟



Entered into force
已生效

Expected to be concluded
预计可完成

Pending
正待完成

Starts negotiation
开始谈判

BOI Investment Policy

投资委（BOI）的投资政策

Liberal Investment Policy

宽松的投资政策

- No foreign equity restrictions in manufacturing sectors
制造业无外资参股比例限制
- 100% foreign ownership possible in many services
许多服务行业允许100%外资持股
- No restrictions on foreign currency remittances
无外币汇款限制
- No export requirement
无出口限制
- No local content requirement
无本地材料使用比例限制

Activities Eligible for BOI Investment Promotion

有资格申请投资委投资优惠的行业

- Agriculture and Agricultural Products
农业、农产品
- Mining, Ceramics and Basic Metals
矿业、制陶业、基础金属业
- Light Industry
轻工业
- Metal Products, Machinery and Transport Equipment
金属制品、机械和交通设备
- Electronic Industry and Electric Appliances
电子电器业
- Chemicals, Paper and Plastics
化工品、纸制品和塑料制品
- Services and Public Utilities
服务业、公用事业

Total 129 sub-items of business activities
上述行业内附项目共计129个

Criteria for Project Approval

项目审批标准

- Minimum investment amount of at least 1 million baht (excluding land cost and working capital)
最少投资额不得少于1百万泰铢（不包括土地费及流动资金）
- Valued added for at least 20 percent of sales revenues (except electronic and agricultural products)
产品附加值不低于总销售额的20%（电子产品及农产品加工业的项目除外）
- A debt-equity ratio (D/E) of less than 3 to 1
负债额与注册资金的比例不超过三比一
- Utilization of modern production processes and new machinery (used machinery must be less than 10 years old and certified by relevant parties)
采用先进的生产技术和全新的机械设备（或使用不超过10年并拥有相关证明的旧设备）
- Adequate environmental protection systems
必须有完善的环境保护系统

Package of Privileges and Incentives

优惠鼓励政策

TAX Incentives

税收鼓励政策

- Import duty reductions or exemptions on machinery and raw materials
减免机械和原材料的进口关税
- Corporate income tax holidays up to 8 years; additional 50% reductions for 5 years
最高可豁免八年法人所得税。
此后五年法人所得税减半。
- Double deduction of public utility costs
公共事业成本可按双倍扣除
- Deductions for infrastructure construction/installation costs
基础设施的建设和安装费从净利中扣除

NON-TAX Incentives

非税收鼓励政策

- 100% ownership land rights for foreign investors
外国投资者可拥有土地所有权
- Permission to bring in foreign experts and technicians
允许引进外国专家和技术人员
(Work permit & visa renewal --3 hours or less)
(工作证和签证手续简便-办理时间不超过三个小时)

Zone-Based Incentives

区域化优惠

Zone 1 (6 provinces)

一区：六府

Zone 2 (12 provinces)

二区：十二府

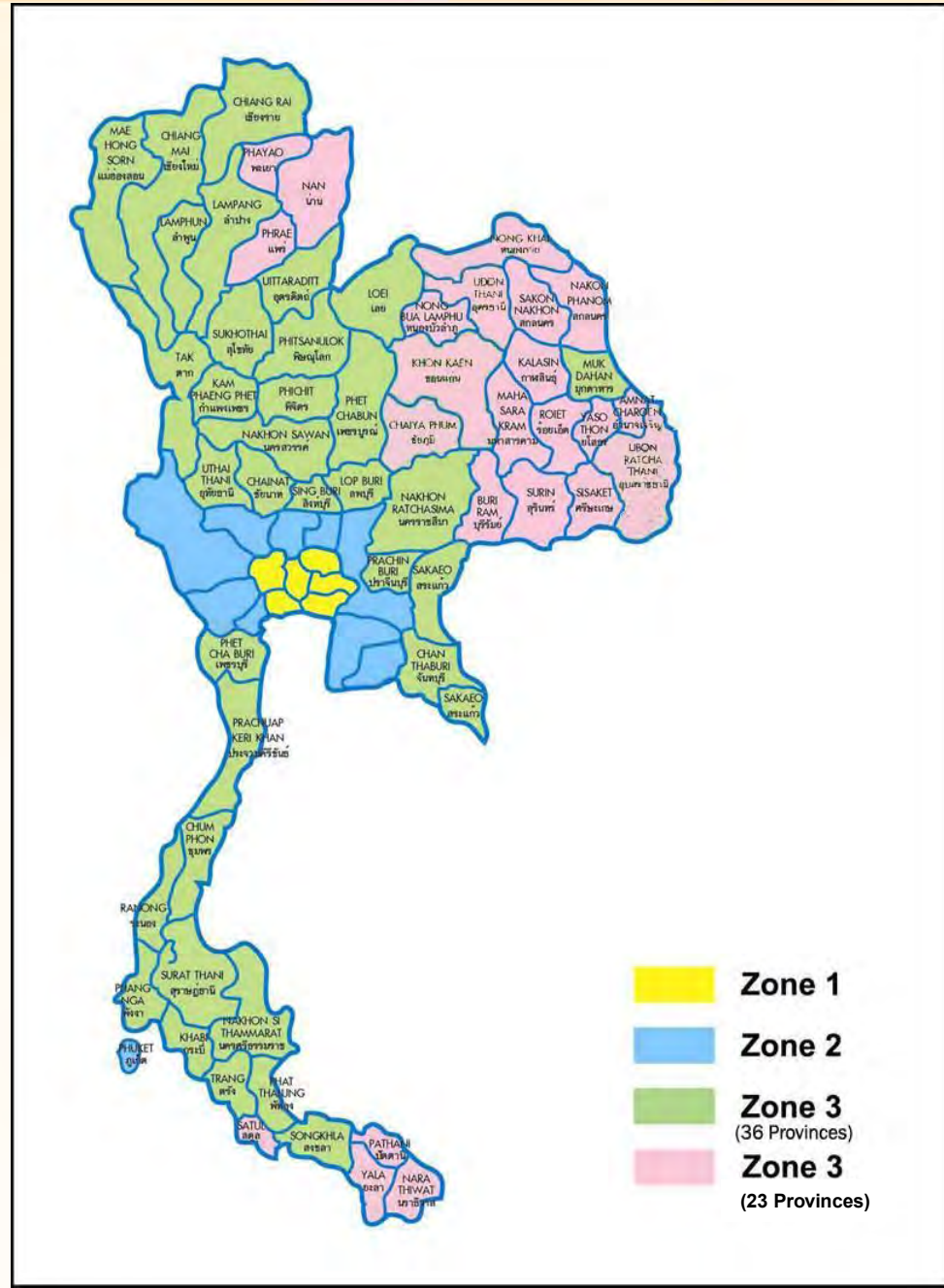
Zone 3 (59 provinces)—Investment Promotion Zone

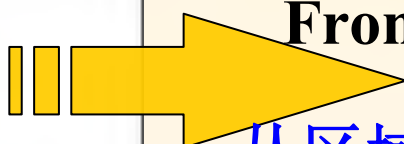
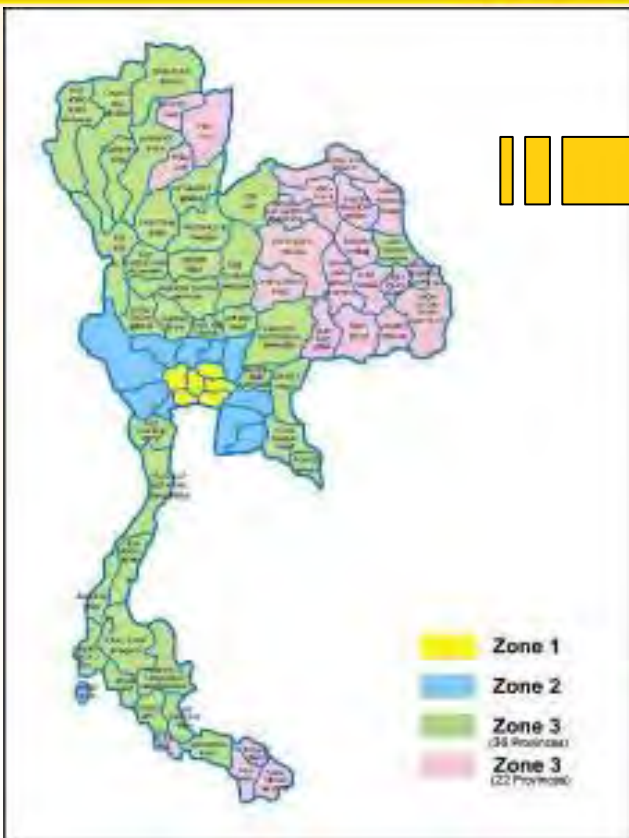
三区：五十九府
(又分为两个副区)

(1) 36 provinces 三十六府

(2) 23 provinces 二十三府

Zone: 投资区	1	2	3
Incentives: Lower			Higher Incentives
优惠力度: 低		→	高





From Zone-Based to Strategic or Priority Industries
从区域优惠差异化，到战略或优势产业优惠

Strategic or Priority Industries

战略及优先发展行业

- Maximum incentives regardless of location
不论何区，享受最高优惠
- Customized packages
客制化优惠

Zone-Based

Incentives :

区域差异优惠

•Zone 1 一区

•Zone 2 二区

•Zone 3 三区

Examples of Priority Activities

优先产业列举

- Agriculture and agro-industries 农业和农用工业
- R&D 研发
- Software development 软件开发
- Molds & Dies 模具
- Biotechnology 生物技术
- Alternative energy 替代能源
- Manufacture of hi-tech products e.g. advanced ceramics
高科技产品，如：精密陶瓷
- Waste recycling & recovery 废物回收利用

Target Industry for Chinese Investor

中国投资的目标行业列举

- Automotive industry 汽车业
- Electrical & Electronics industries 电气和电子工业
- Machinery 机械设备
- Alternative Energy 代替能源

New Policy Direction for 2010-2012

2010-2012年投资政策指南

“Investment Promotion Policy for Sustainable Development” 可持续发展的投资鼓励政策

Application submission deadline: December 31, 2012
申请截止日期：2012年12月31日

“Investment Promotion Policy for Sustainable Development” Package

可持续发展的投资鼓励政策

Measure to promote investment in target industries, namely
投资鼓励政策适用的目标行业包括:

- Activities related to manufacture of eco-friendly material and product, e.g. bio plastic
环保材料和环保产品项目，如生物塑料生产
- Activities related to energy saving and alternative energy
节能和替代能源项目
- Activities that involve high technology, e.g. automotive electronics, biotech, nano-tech, Functional textile
高科技项目，如汽车电子产品、生物技术、纳米技术、功能性纺织品生产

“Investment Promotion Policy for Sustainable Development” Package

可持续发展的投资鼓励政策

Incentives 优惠政策

- Exemption of import duties on machinery 免机械进口税
- 8-year exemption of corporate income tax with no cap
获免缴法人所得税八年，不规定免缴法人所得税的上限
- 50% reduction of corporate income tax on net profit for five years
免税期满后获法人所得税5年减半
- Double deduction of transportation, electricity and water supply costs for 10 years 运输费、水电费用可按双倍计算成本，为期10年
- Deduction from net profit of 25% of investment in infrastructure installation and construction costs in addition to normal capital depreciation 允许把基础服务设施的建设和安装费的25%从净利中扣除

** Application submission deadline: December 31, 2012

申请截止日期：2012年12月31日

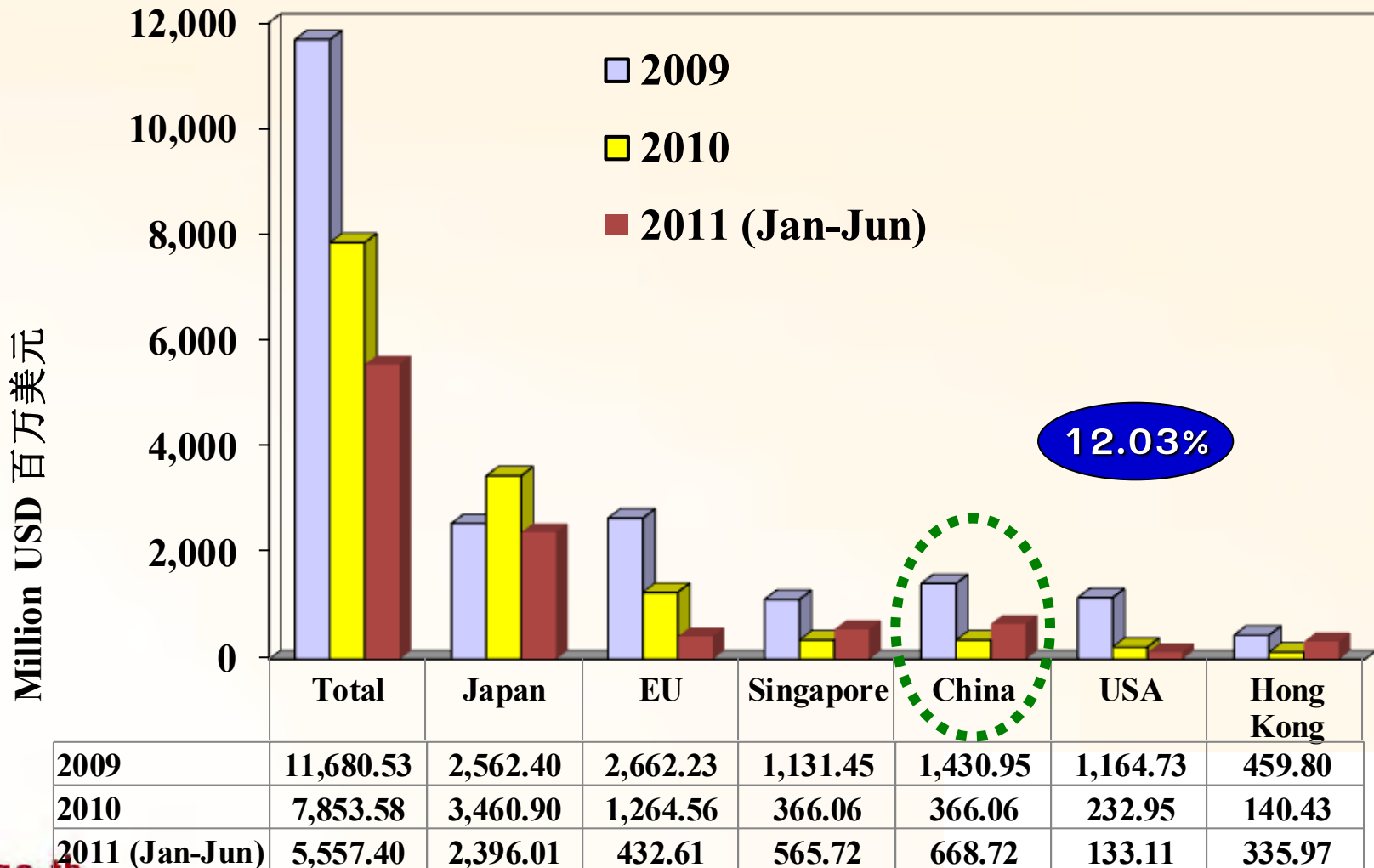


Recent Investment Trend

近期投资的趋势

Foreign Direct Investment Applications

外商直接投资申请概况



Chinese Investment Applications Submitted to BOI

Totals by Sector: 2005-2011 (Jan-Jun)

中国投资申请情况

类别总数（按产业）：2006-2011（一月至六月）

Sector 产业	Projects 项目	Million USD 金额（百万美元）
Agricultural Products / 农产品	35	707.37
Minerals and Ceramics / 矿产品和陶瓷业	13	561.44
Light Industries/Textiles / 轻工业/纺织品	17	67.18
Metal products and Machinery / 金属产品和机械设备	35	750.83
Electrical and Electronics Products / 电气及电子产品	20	100.46
Chemicals and Paper / 化工产品及纸业	29	297.91
Services / 服务业	18	1,342.06
TOTAL 总数	167	3,827.26

Major Chinese Investors in Thailand

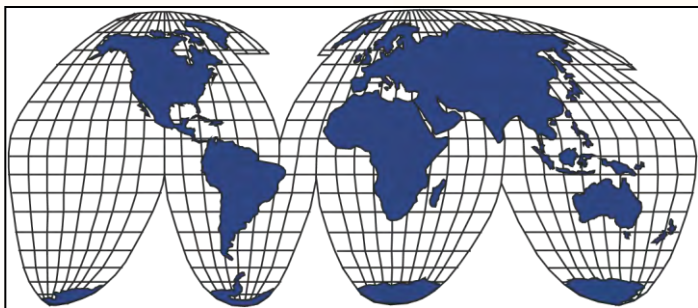
(中国在泰主要投资企业)

Company (企业)	Business (业务)
Holley Group Electric (Thailand) (华立集团泰国电气有限公司)	Electricity Power Meters (电表)
HUAWEI (华为)	IT Service Trade (信息技术服务)
HAIER ELECTRIC (海尔集团)	Electrical Appliances (家用电器)
CIMC (中国国际海运集团)	Trailer Parts (拖车部件)
Hangzhou Zhongce Rubber Company Limited (杭州中策橡胶有限公司)	Tyre (轮胎)
New Thai Wheel Manufacturing (Lizhong Wheel Group) (立中车轮集团)	Aluminium Alloy Wheel (轮轴)

BOI Services

投资委服务

BOI Support Services 投资委服务支持



Investment Matchmaker Program

投资对接计划

One Start One Stop Investment Center

一站式投资服务中心

**1-Stop for visas & work permits:
work permits in 3 hours**

一站式服务：三小时内完成签证、工作证办理

Industrial Subcontracting Services

Vendors meet customers program

(BUILD Unit)

**工业分包商服务：分包商与客户面对面计划
(投资委工业链接发展事务组)**

ASEAN Supporting Industry Database

东盟辅助产业数据库

**Interaction with other govt. agencies
on behalf of investors**

为投资者接洽其他政府部门

Country desks 多国事务小组 e. g. Chinese desk

Overseas offices 海外办事处



10 - 25 November 2011

2011年11月10日-25日

IMPACT Exhibition and

Convention Center

曼谷会议展览中心

**Organized by Thailand Board
of Investment**

泰国投资促进委员会组织举办

Objectives 事项

- To celebrate the auspicious occasion of the 84th birthday of His Majesty the King.
庆祝泰国国王陛下84岁寿诞。
- To highlight the achievements of Thai industry in the areas of technology and innovation, as these will greatly enhance efficiency and industrial competitiveness and result in new, environment-friendly production.
展现泰国工业技术创新领域傲人的成就，提高效率、工业竞争力，实现环保型生产及创新。
- To build confidence in the Thai economy, while also improving the country's image; BOI Fair 2011 will give wide exposure to the Thai industrial sector's commitment to serving society and preserving the natural environment.
增添投资者对泰国经济的信心，提高国家形象。2011年泰国投资委博览会将极大的展现工业部门对社会服务和环境保护的承诺。
- To provide an opportunity for members of the industrial community to meet, conduct business, and network.
为工业界同仁提供对接、交流和开创业务的平台。

BOI Offices

BOI 办事处

Thailand 泰国

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谢谢

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Your partner for sustainable investment