

**DUANGJAI ASAWACHINTACHIT
DEPUTY SECRETARY GENERAL
THAILAND BOARD OF INVESTMENT**

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Presentation Outline

提綱

- **Thailand in Brief** 泰國簡介
- **Why Thailand** 選擇泰國的原因
- **Investment Incentives & Opportunities** 投資優惠政策
- **BOI Services** 投資委服務

THAILAND IN BRIEF

泰國簡介

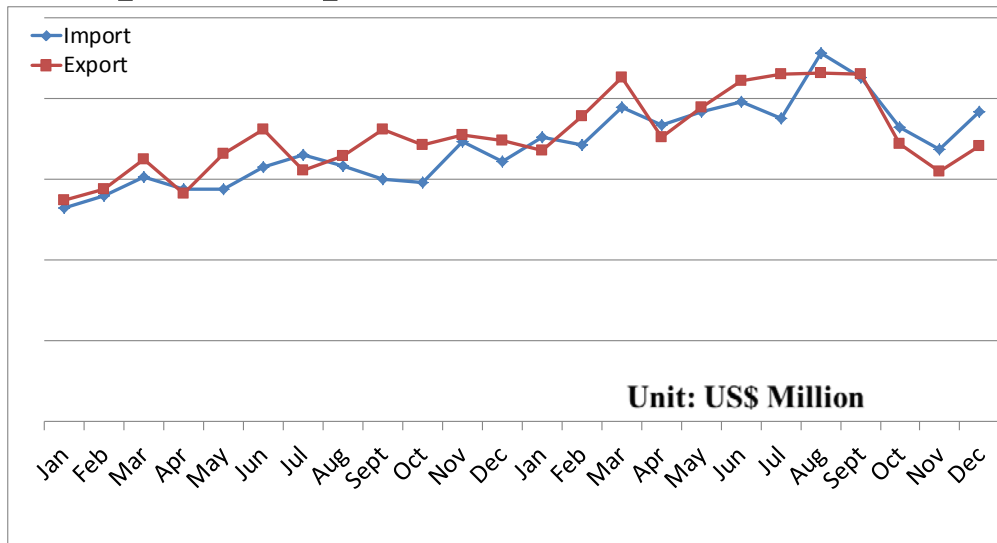
Thailand in Brief 泰國概況



Population: 67 Million
Labor Force: 39 Million
泰國有六千七百萬人口，
勞動力人數三千九百萬



Import : Export, 2010 - 2011



GDP(2011): US\$345.6 billion
國內生產總值(2011年) 3,456
億美金

World Bank: Thailand is an
upper middle income country
世行：泰國已進入中等收入
國家



THAILAND is the world's

- 17th largest manufacturer
- 20th largest exporter
- 33rd largest economy

And the 2nd largest economy in
ASEAN

泰國在全球經濟排名中名列33位，全球最大製造國排名中名列第17位，全球最大出口國排名名列第20位。在東協十國中，尼之後的第二大東協經濟體。



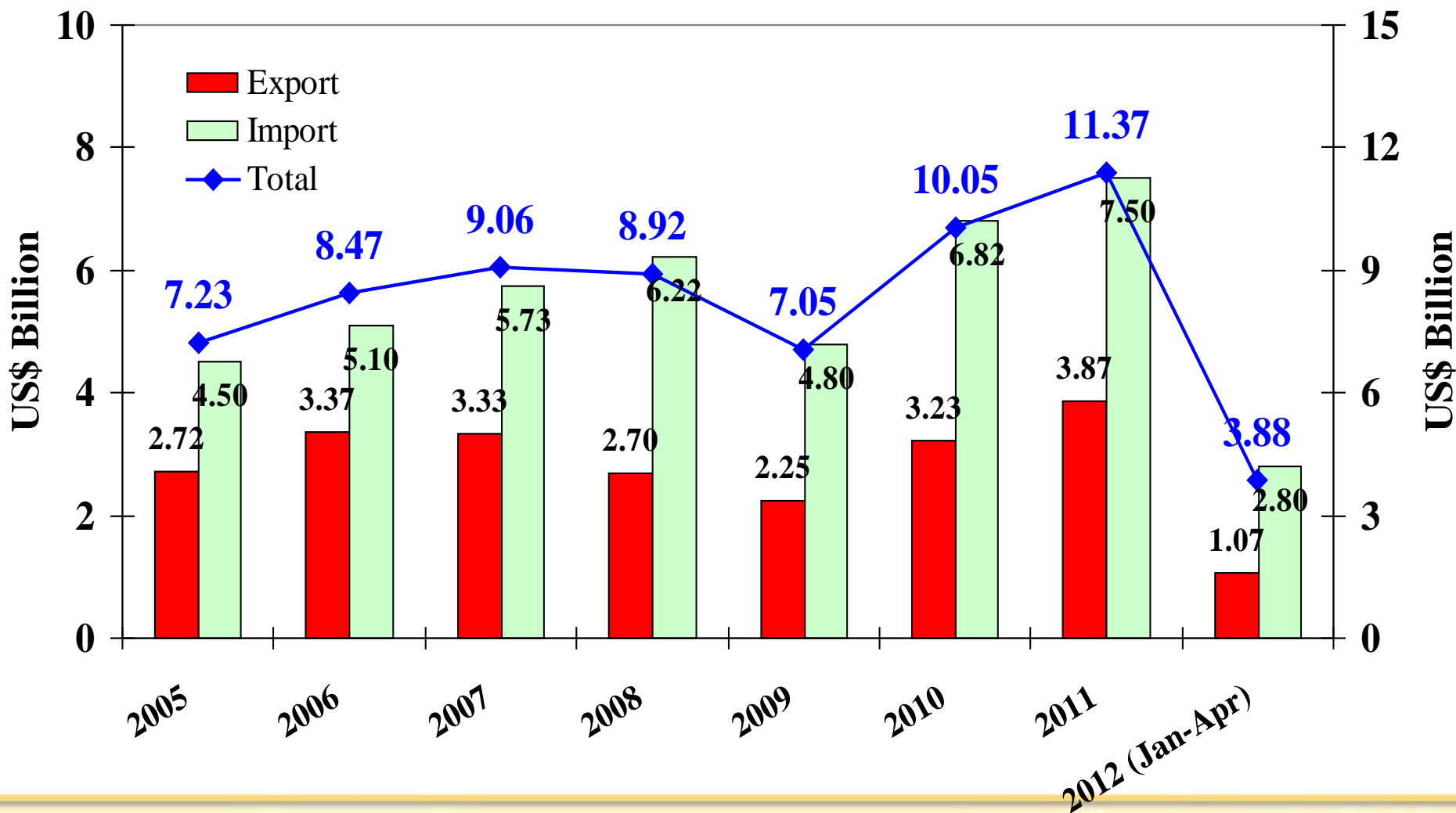
ECONOMIC PROJECTIONS 2011-13

2011-13年的經濟預測

Economic Projections 經濟預測	2011	2012	2013
1) GDP growth (percent y-o-y) GDP 增速 (與上年同比增長的百分比)	0.1	6.0	5.8
2) Export, FOB value (percent y-o-y) 出口, 離岸值 (與上年同比增長的百分比)	16.4	9.2	14.6
3) Import, CIF value (percent y-o-y) 進口, 到岸值 (與上年同比增長的百分比)	24.7	17.0	12.4
4) Trade account (billion US. dollar) 貿易總額 (十億 美元)	23.5	9.8	16.4
5) Current account (billion US. dollar) 國際收支平衡 (十億 美元)	12.3	-2.1	-0.9

TRADE SUMMARY BETWEEN THAILAND/TAIWAN

泰國-台灣貿易概述



PRINCIPAL EXPORTS TO TAIWAN

台灣主要出口產品

Unit: US\$ million
單位：百萬美元

Description 產品描述	2009	2010	2011	2011 (Jan-Apr)	2012 (Jan-Apr)
Electronic integrated circuits 光電子集成電路	277.3	481.9	614.7	210.1	150.1
Chemical products 化工產品	120.2	234.7	338.3	119.7	95.0
Sugar 蔗糖	102.7	40.9	124.5	40.8	66.9
Polymers of ethylene, propylene, etc in primary forms 乙烯和丙烯等初級聚合物	77.6	140.2	194.3	68.3	54.5
Iron and steel and their products 鋼鐵及製品	59.9	108.5	152.0	56.2	40.9
Others 其他	1,613.3	2,224.5	2,447.7	869.1	665.3
Total 合計	2,251.0	3,230.7	3,871.4	1,364.3	1,072.7

PRINCIPAL IMPORTS FROM TAIWAN

台灣主要進口產品

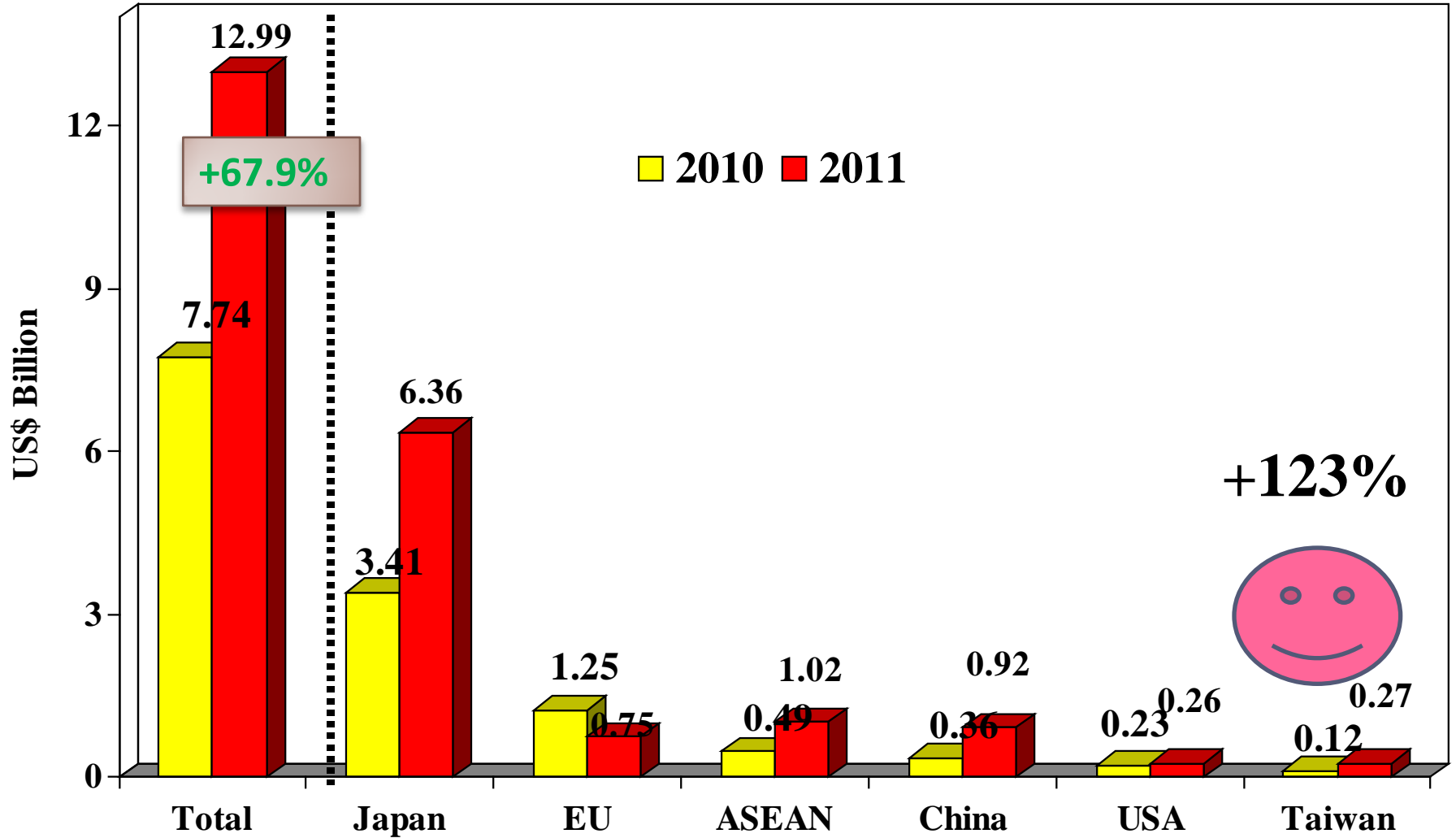
Unit: US\$ Million

單位：百萬美元

Description 產品描述	2009	2010	2011	2011 (Jan-Apr)	2012 (Jan-Apr)
Electronic integrated circuits 光電子集成電路	1,262.0	1,866.3	1,999.8	747.9	853.1
Machinery and parts 機械和配件	447.9	608.1	732.3	224.4	318.9
Chemicals 化工產品	486.0	727.8	815.5	308.3	284.2
Iron, steel and products 鋼鐵及鋼鐵製品	407.1	597.2	731.5	236.2	281.3
Electrical machinery and parts 電力機械和配件	235.3	363.8	397.9	138.8	130.9
Others 其他	1,959.2	2,652.0	2,825.2	896.8	934.5
Total 合計	4,797.5	6,815.3	7,502.2	2,552.5	2,802.8

FOREIGN DIRECT INVESTMENT APPLICATIONS

外商直接投資申請



TAIWANESE INVESTMENT APPLICATIONS TOTALS BY SECTOR: 2006 – 2012 (JAN-MAY) 2006-2012年（一月-五月）台灣投資申請案

Sector	Projects	US\$ Million
Agricultural Products	37	138
Minerals and Ceramics	16	71
Light Industries/Textiles	46	128
Metal Products and Machinery	82	312
Electric and Electronic Products	62	770
Chemicals and Paper	56	133
Services	44	421
TOTAL	343	1,974

Examples of Taiwanese Investments in Thailand

到泰國投資的台灣企業列子

JTH



LITEON



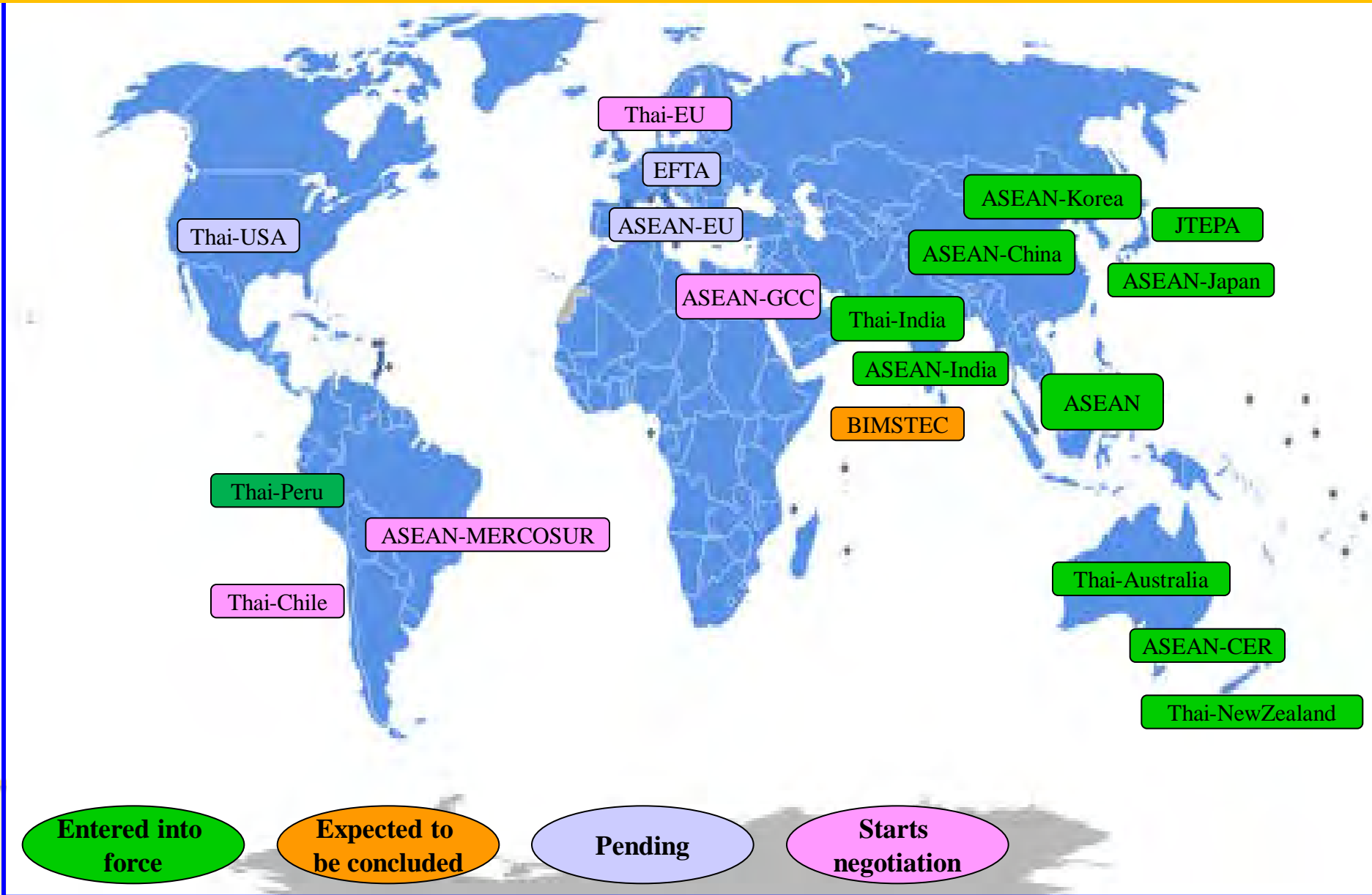
APCB





WHY THAILAND
選擇泰國的原因

Strategic Location + An Expanding FTA Regime



ASEAN Connection

Thailand

- 67 million population
- GDP (2011) US\$345.6 billion
- GDP/ p.capita US\$5,113



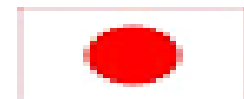
ASEAN

- +592 million pop.
- US\$1.8 trillion GDP (2010)



ASEAN+3

- +2 billion pop.
(1/3 world pop.)
- US\$9trillion GDP
(16% of world GDP)





Doing business in a
more transparent world

The World Bank Ranks Thailand one of the Easiest Places in Asia to do Business and 17th in the World

世界銀行評泰國為亞洲地區投資條件最便利國家位居第三位，在全球位居第十七位。

37 commercial airports, including 6 international airports

37個商用機場，其中6個為國際機場



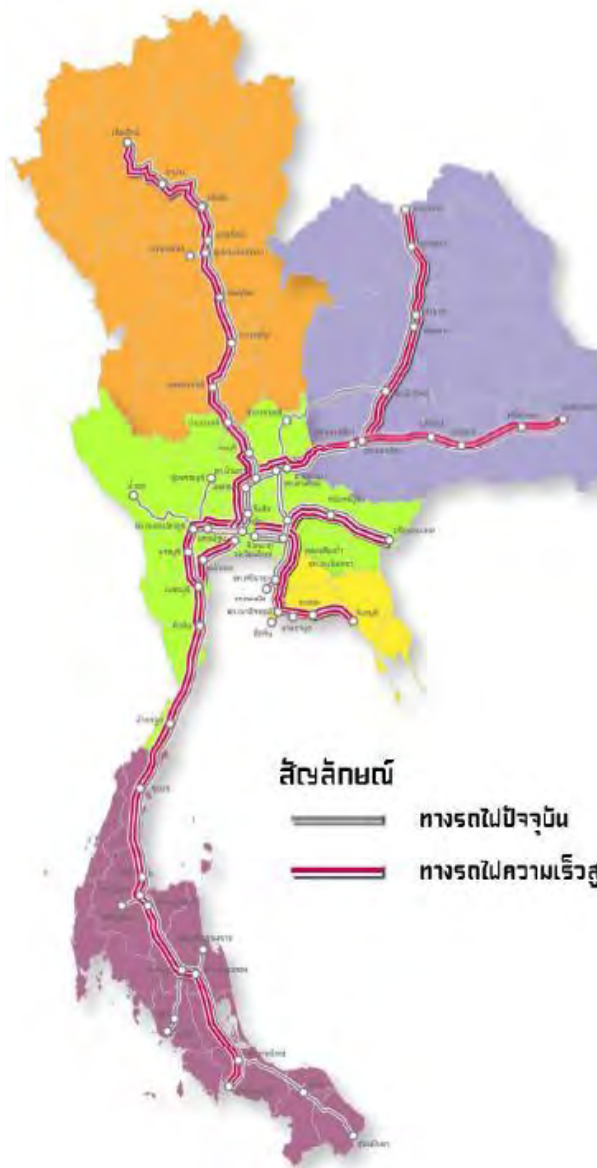
**Over 50 Industrial Estates,
Zones and Parks
超過50個工業園區**

Ports码头/港	Capacity/Year 容量/年
Bangkok 曼谷	1.3 million TEUs.
Laem Cha Bang 廉差邦	7.4 million TEUs.
Chiang Saen 清盛	120,000 tonnes.
Chiang Kong 清空	15,000 tonnes.
Map Ta Phut 瑪达浦	2,00,000 tonnes.
Songkla宋卡	160,000 TEUs/ 600,000 tonnes.
Phuket 普吉	450,000 tonnes

Infrastructure Development 基礎設施發展

Sector 行業	Amount 數額 (Billion Baht) (十億泰銖)	Amount 數額 (Billion USD) (十億泰銖)	Share (%) 份額 (%)
1. Land Transport 陸路運輸	1,470	46.7	65
2. Air and Marine Transport 空運和海運	148.5	4.7	6
3. Energy 能源	499.5	15.9	22
4. Telecommunication 電子通訊	35.2	1.1	2
5. Utility 公共設施	117	3.7	5
Total 總額	2,270	72.1	100

High Speed Train 高速列車



Route 路線	From 起始	To 目的地	Distance (KM) 距離 (公里)	Amount (Mill. USD) 數額 (百萬.美元)
North 北部	Bang Sue 邦室	Chiang Mai 清邁	745	7,300
North-East 東北部	Bang Sue 邦室	Nong Khai 廊開	615	3,100
East 東部	Makkasan 瑪咭神	Rayong 羅勇	330	2,300
South 南部	Bang Sue 邦室	Huahin 華欣	225	2,600





Investment Environment and Incentives

TAXATION 課稅

- Corporate income tax 企業所得稅
 - 0, 10% for regional operating headquarters
地區營運總部 10%
 - 15-23% for net profits (for firms with capital of ≤ 5 million baht)
淨利潤15%-30% (適用於資產 < 5 百萬泰銖的企業)
 - 23% of net profits (for other firms)
淨利潤30% (其他企業)
- VAT – 7% 增值稅 : 7%
- Remittances: 10% of gross remittances 匯款: 匯款總額的10%
- Withholding: 10-15% 代扣所得稅 10-15%
- Personal income: 0-37% (sliding scale)
個人所得稅: 0-37% (據規模而定)

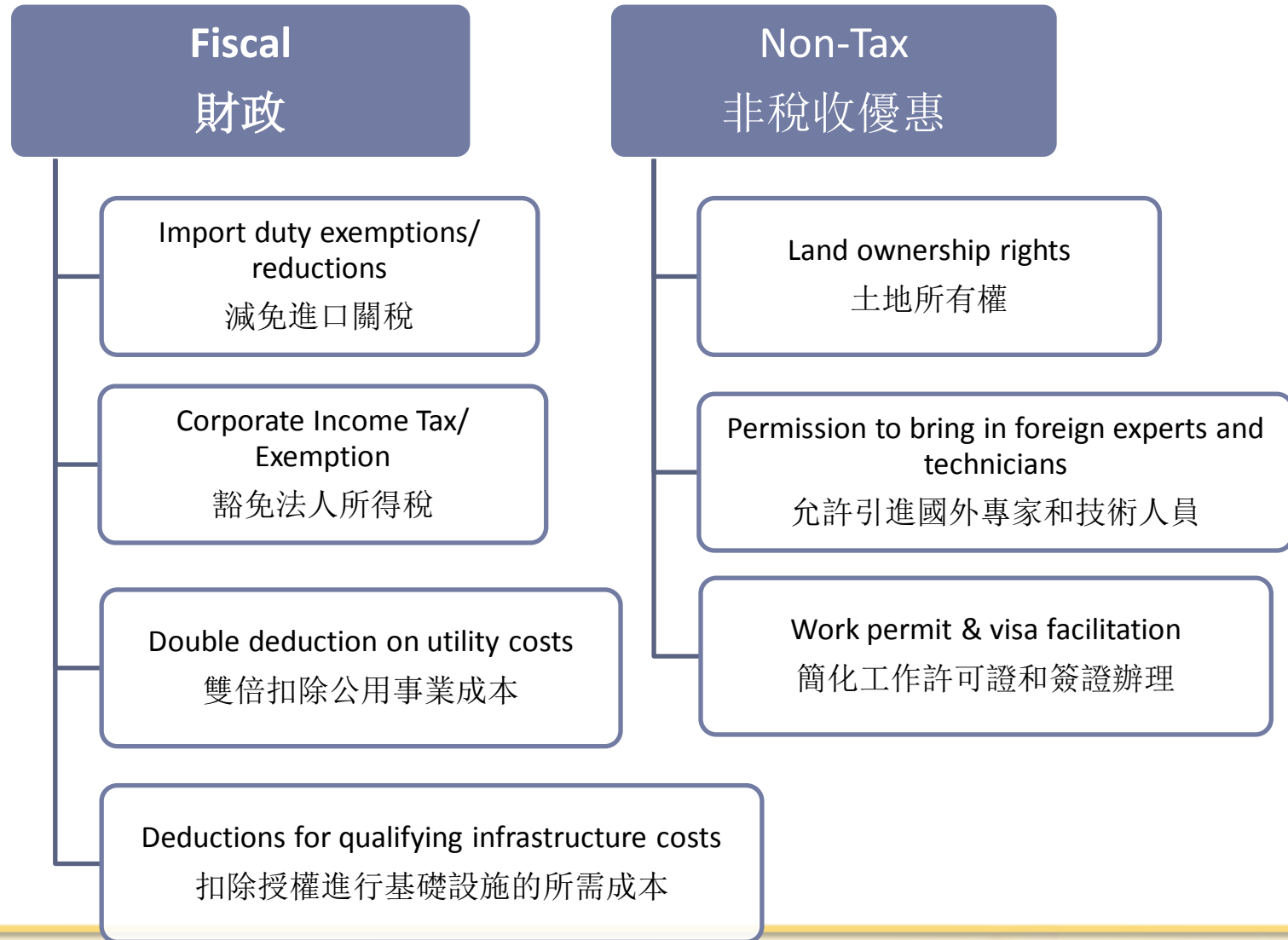
LIBERAL INVESTMENT POLICY

寬鬆的投資政策

- No foreign equity restrictions in manufacturing sectors
製造業無外資參股比例限制
- 100% foreign ownership possible in many services
許多服務行業允許100%外資持股
- No restrictions on foreign currency remittances
無外幣匯款限制
- No export requirement
無出口限制
- No local content requirement
無本地材料使用比例限制

BOI's Investment Incentives

BOI總體投資優惠政策



Activities Eligible for BOI Promotion



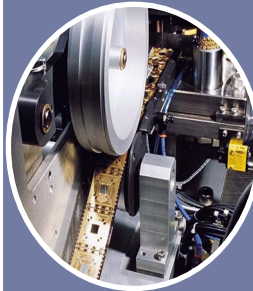
Agriculture



Mining,
Ceramics
Basic
Metals



Light
Industries



Metal
Products,
Machinery,
Transport



E&E



Chemicals,
paper,
plastics



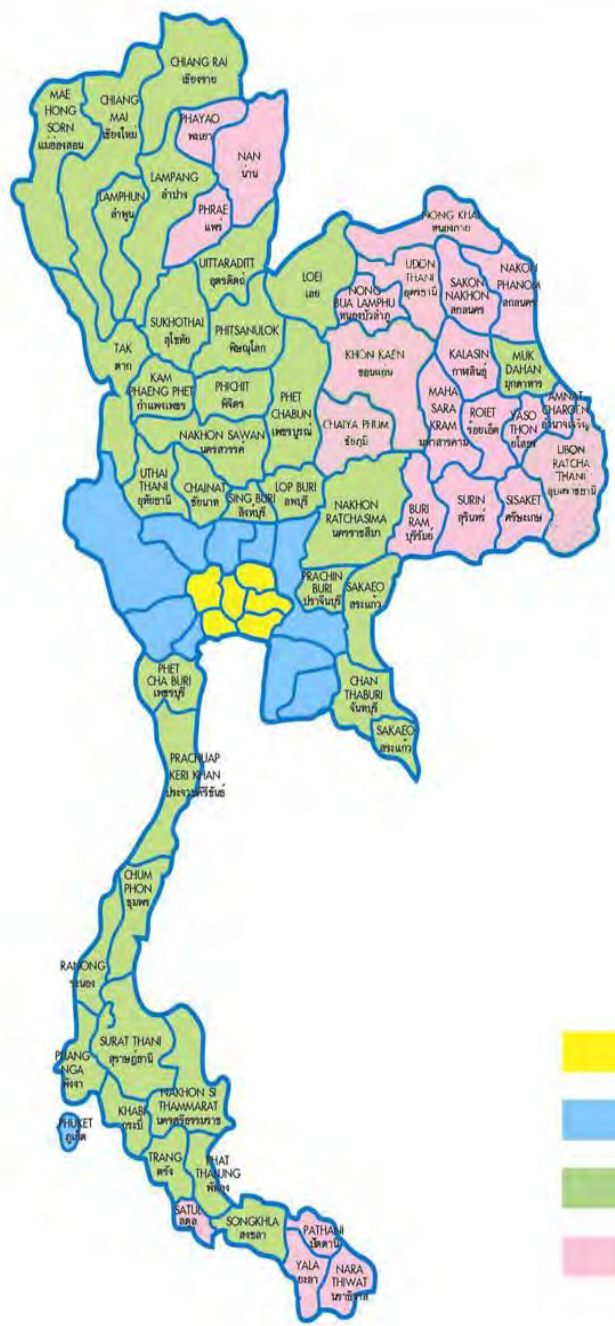
Services

BOI Zone-Based Incentives

投資委促進區域劃分

- 3 zones to promote industrial decentralization
- 3個投資促進區域是為了促進分散不同工業

Zone:	1	2	3
Incentives:	Lower	→	Higher Incentives
優惠:	低		高



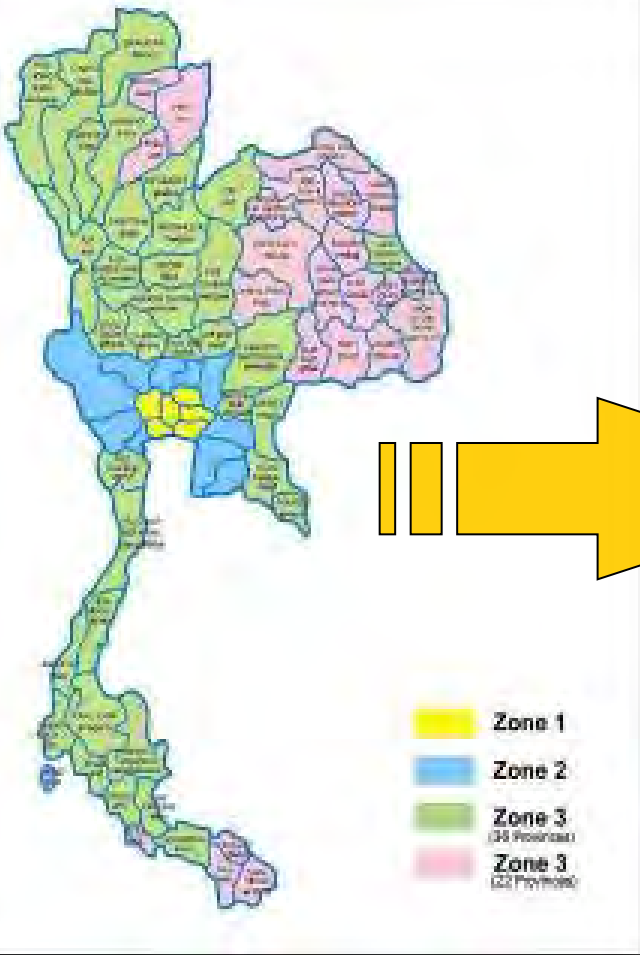
- Zone 1
- Zone 2
- Zone 3
(36 Provinces)
- Zone 3
(22 Provinces)

FROM ZONE-BASED TO SECTORAL APPROACH 從區域到行業

Sector Matrix: 產業矩陣
Incentives to strengthen Competitiveness
以獎勵機制加強競爭力

Priority Activities
優先產業

Maximum incentives regardless of zone
全部區域都享受最大優惠政策
8-year exemption of corporate income tax
免8年法人所得稅
Exemption of import duties on machinery
機械進口稅



Zone-Based

Incentives:

區域化優勢

- Zone 1 一區
- Zone 2 二區
- Zone 3 三區

EXAMPLES OF PRIORITY ACTIVITIES

優先產業列舉

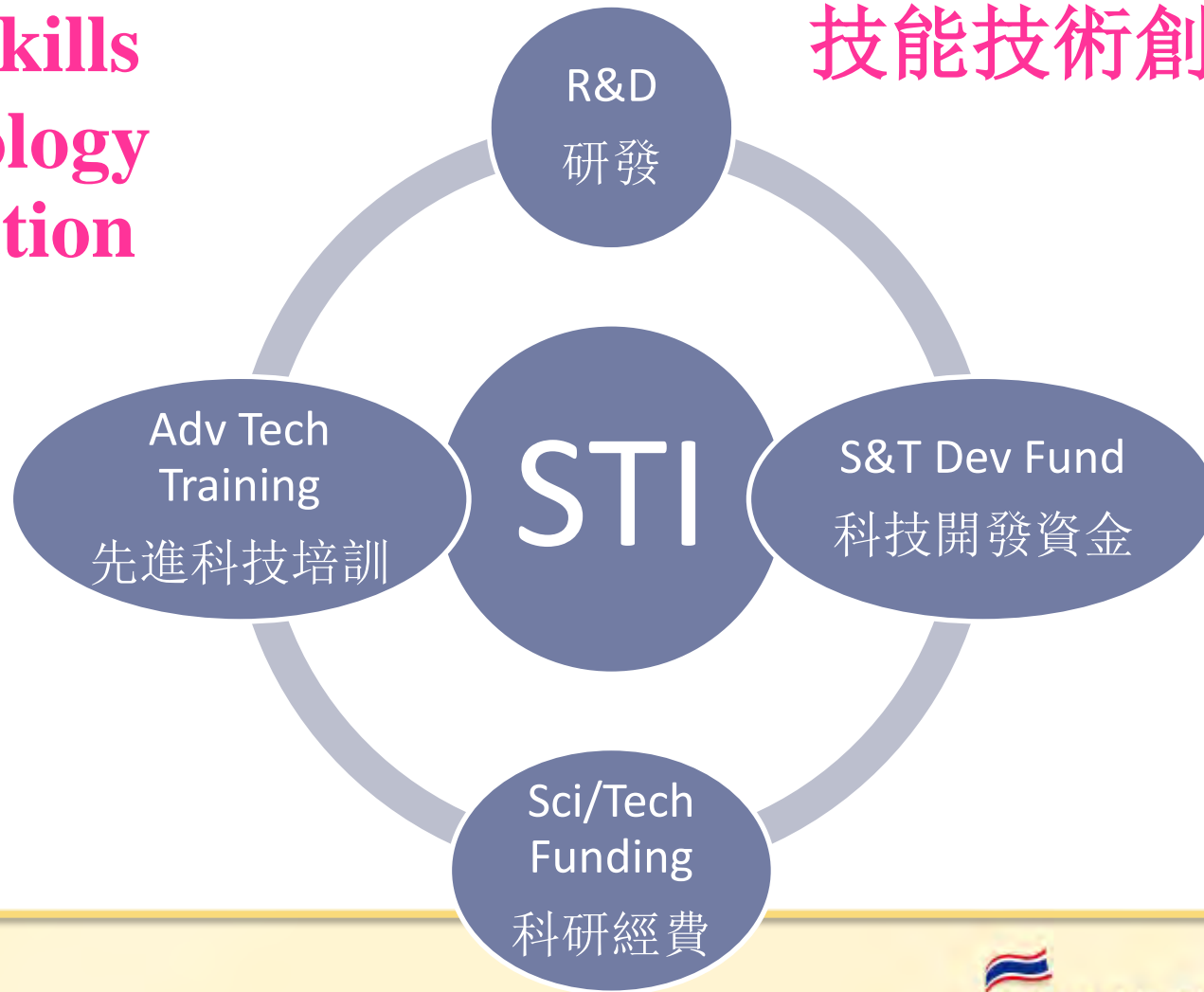
- Agriculture and agro-industries 農業和農工業
- R&D 研發行業
- Software development 軟件開發行業
- Molds & Dies 模具製造行業
- Biotechnology 生物科技行業
- Alternative energy 替代能源產業
- Manufacture of hi-tech products e.g. advanced ceramics 高科技製造業，如：精密陶瓷製造業
- Waste recycling & recovery 廢棄物回收利用行業

Additional Incentive Package for STI:

技能技術創新及其外附激勵項目

**Skills
Technology
Innovation**

技能技術創新



New Policies for 2010-2012 2010年-2010年新投資政策

“Investment for Sustainable Development”

“可持續發展的投資政策”

Application submission deadline: **December 31, 2012**

申請截至日期: **2012年12月31日**

1. Special incentives for 3 groups of targeted activities 可特別優惠的三組行業

- 1) **Manufacture of eco-friendly material and product, e.g. bioplastics**
環保材料和產品製造行業, 如生物塑料
- 2) **Energy saving and alternative energy**
節能或替代能源行業
- 3) **High technology activities e.g. industrial electronics, electronic parts for vehicles, biotech, nano-tech, functional fiber etc.**
高科技行業, 如:工業電子、汽車電子零配件、生物技術、納米技術和功能纖維等

Incentives 優惠政策

- **Exemption of import duties on machinery**
免機械進口稅
- **8-year exemption of corporate income tax with no cap**
免8年法人所得稅無資本無總額限制
- **5-year 50% reduction of corporate income tax on net profit**
免稅期滿後再獲法人所得稅5年減半
- **10-year double deduction of transportation, electricity and water supply costs**
運輸, 水電費用可按雙倍計算, 為期10年
- **deduction from net profit of 25% of investment in infrastructure installation and construction costs in addition to normal capital depreciation**
允許把基礎服務設施的安裝和建設費的25% 從淨利中扣除

“Investment for Sustainable Development”

“可持續發展的投資政策”

2) Measure to promote energy conservation, alternative-energy utilization or reduction of environmental impacts

利用節能、替代和環保能源以提高生產效率的措施

Incentives 優惠政策

- Import duty exemption on machinery.

免機械進口稅

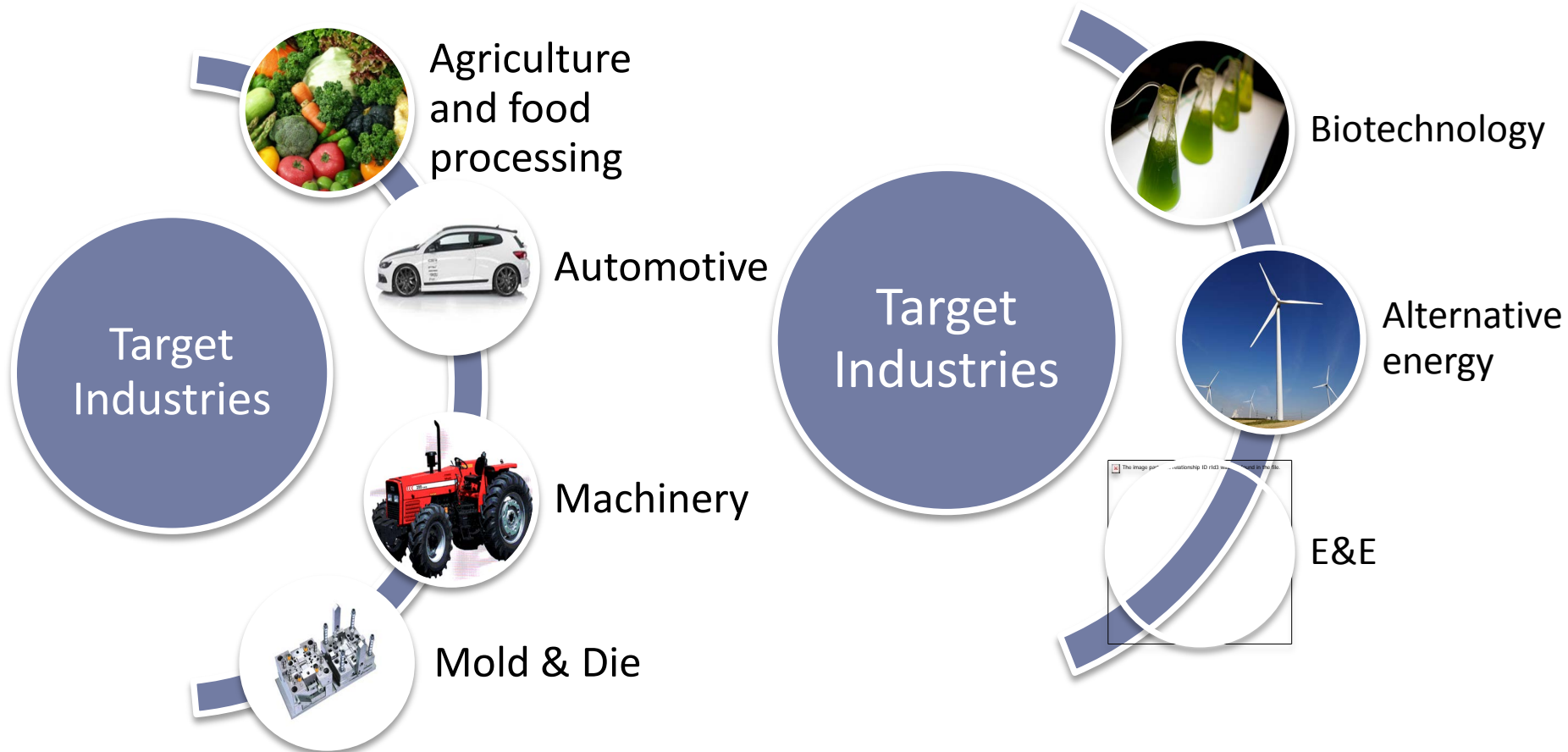
- 3-year corporate income tax exemption on the revenue of existing projects, accounting for 70% of the investment under this measure excluding cost of land and working capital.

免3年現有項目企業所得稅，該項目須占總投資的70%以上（不包括土地費和周轉資金）

- 8-year corporate income tax exemption in case of reduction of environmental impacts

Target Industries for Taiwan Investors

台灣投資者的目標行業



Auto & Auto Parts Industry

汽車及其零部件產業

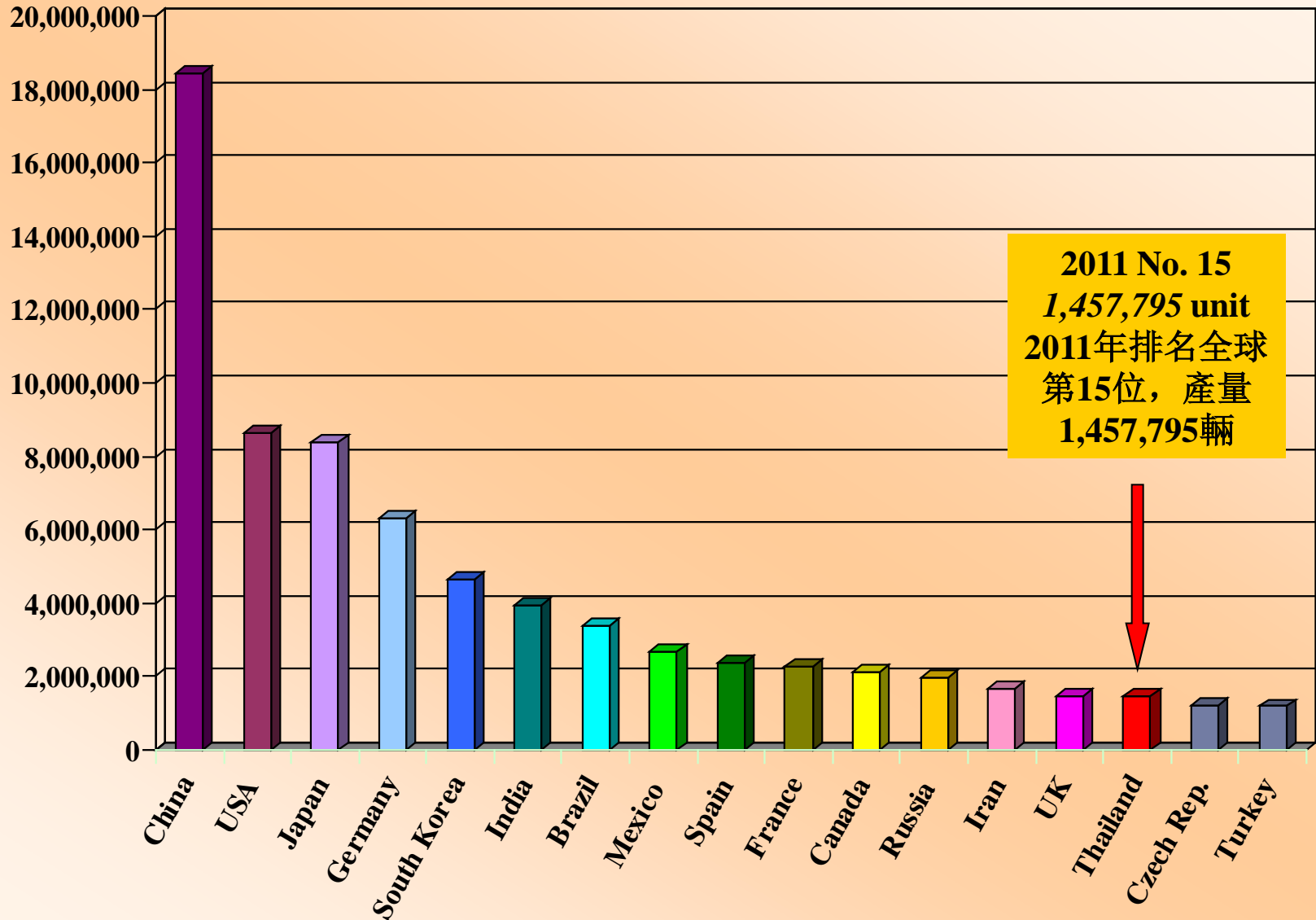
Geared for Excellence

績效卓越



Thailand Ranked #15 2011 Automobile Production

2011年泰國汽車產量據世界第15位



Top 100 Global Suppliers 2009 Active in Thai Automotive Industry

2009年泰國汽車製造業前一百名國際性供應商

Japanese Global Suppliers

日本國際性供應商

- | | |
|-------------------------|--------------------------|
| 1. Denso 日本電裝 | 48. Keihin 日本京濱 |
| 3. Aisin Seiki 愛信精機 | 49. Stanley 史丹利 |
| 14. Toyota Boshoku 豐田紡織 | 50. Mitsubishi 三菱 |
| 16. Yazaki 日本矢崎 | 51. NTN 日本東洋 |
| 17. Sumitomo 住友商事 | 55. Panasonic 日本松下 |
| 19. Hitachi 日立 | 60. Showa 日本昭和 |
| 22. CalsonicKansei 康奈可 | 66. Mitsuba 三葉電機 |
| 23. JTEKT 捷太格特 | 78. Asahi Glass 旭硝子 |
| 27. Toyoda Gosei 豐田合成 | 89. Nissin Kogyo
日信工業 |
| 31. NHK Spring 日本發條 | 91. Alpine 阿爾賓 |
| 32. TS Tech 臺思科技 | 96. Pioneer 日本先鋒 |
| 33. Koito 日本小系 | 99. Exedy 日本大金 |
| 34. NSK 日本精工 | |
| 37. Takata 日本高田 | |
| 43. Bridgestone 普利司通 | |
| 44. Tokai Rika 東海理化 | |
- 28 Companies**
28家公司

Other Global Suppliers

其他國際性供應商

- | | |
|----------------------------|---------------------------|
| 2. Robert Bosch 博世集團 | 57. Goodyear 固特異 |
| 4. Continental 德國馬牌 | 58. Antolin
阿爾卡拉斯 |
| 8. Johnson Control
江森自控 | 67. Draexlmaier
德國斯米爾 |
| 9. Delphi 特爾斐 | 90. Hayes Lemmerz
賀氏公司 |
| 10. ZF 德國采埃孚 | 95. Inergy 英瑞杰 |
| 11. TRW 美國天合 | 100. 3M 3M公司 |
| 13. Valeo 法雷奧 | |
| 15. Lear 李爾公司 | |
| 18. BASF 巴斯夫 | |
| 21. Visteon 偉世通 | |
| 25. Mahle 德國馬勒 | |
| 26. Dana 美國德納 | |
| 28. Autoliv 奧托立夫 | |
| 40. Michelin 米其林 | |
| 47. Federal-Mogul
聯邦輝門 | |
| 53. GKN Driveline
古凱恩傳動 | |
- 22 Companies**
22家公司

Thailand's Agro-Industry

泰國農工業

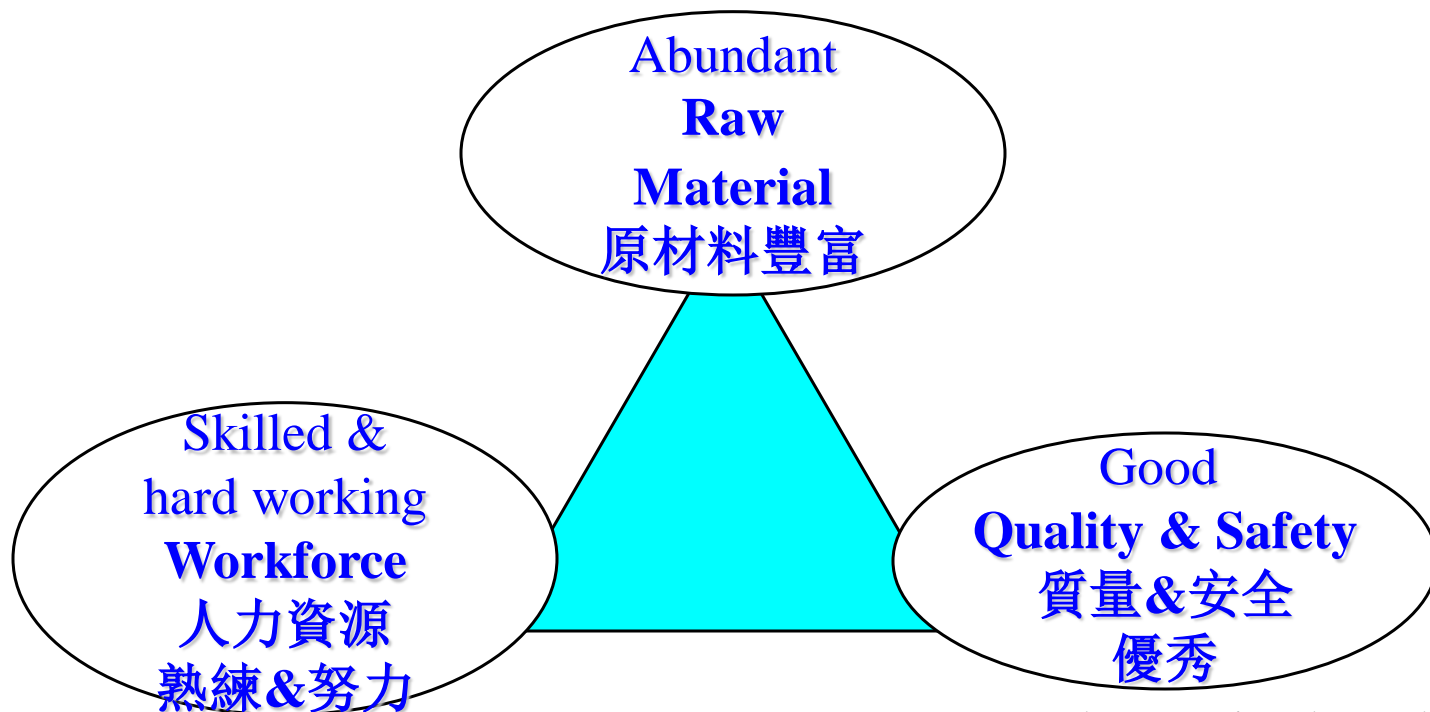


STRENGTHS OF THAI FOOD INDUSTRY

泰國食品業優勢

>80% of raw materials used by the food industry are locally sourced at low prices

泰國食品業超過80%的原材料以低廉的價格直接從當地購買



Size of workforce now > 39.5 million
Minimum Daily Wage Bt300 (Bangkok)

現今勞動力概括：超過3,950萬勞工
最低日薪215泰銖（曼谷）

GMP and International Standard

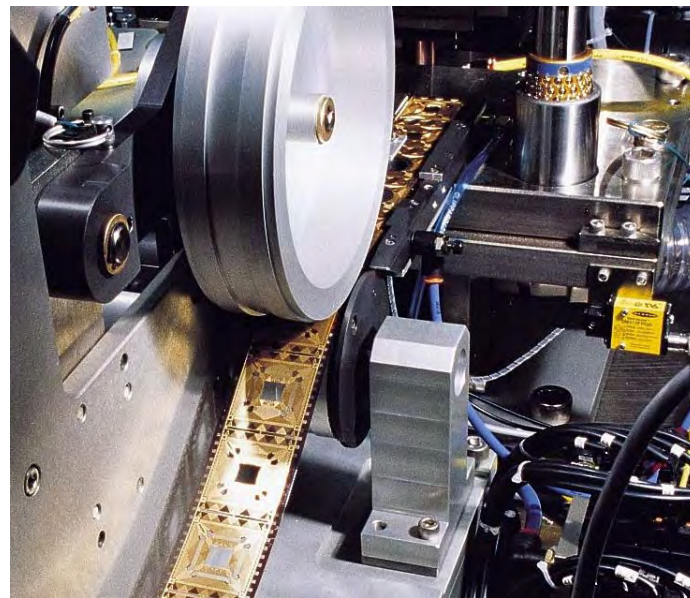
Good Manufacturing Practices is a mandatory measure
for 54 types of food products

在泰國54中食品生產行業中嚴格實施良好生產規範
（GMP）和國際食品生產規範

Electronics & Electrical Products

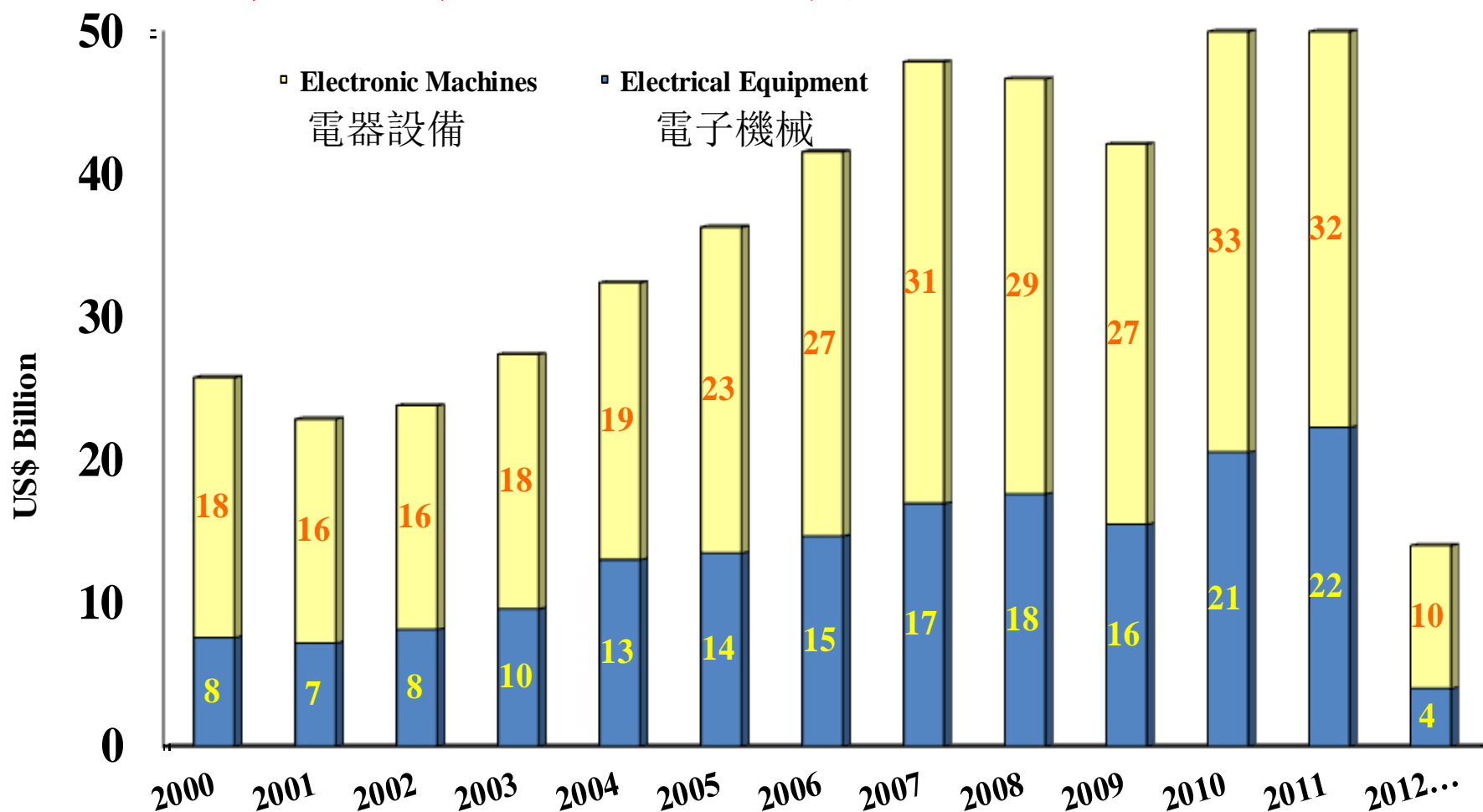
Integrating Innovation & Technology

電子電器產品集成更新與技術



E&E ACCOUNTS FOR 30% OF EXPORTS:

電子電器產品出口量占總出口量的30%

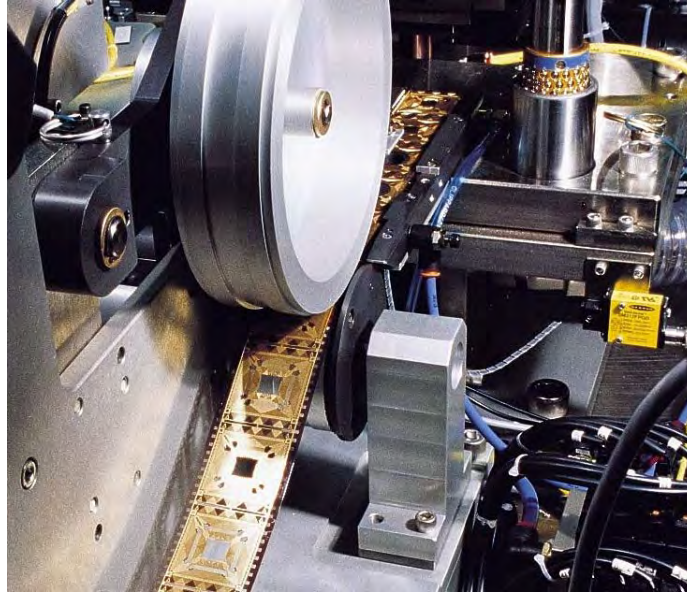


Source: MOC, as of June 8, 2012

數據來源：泰國商務部，2012年6月8日

MACHINERY

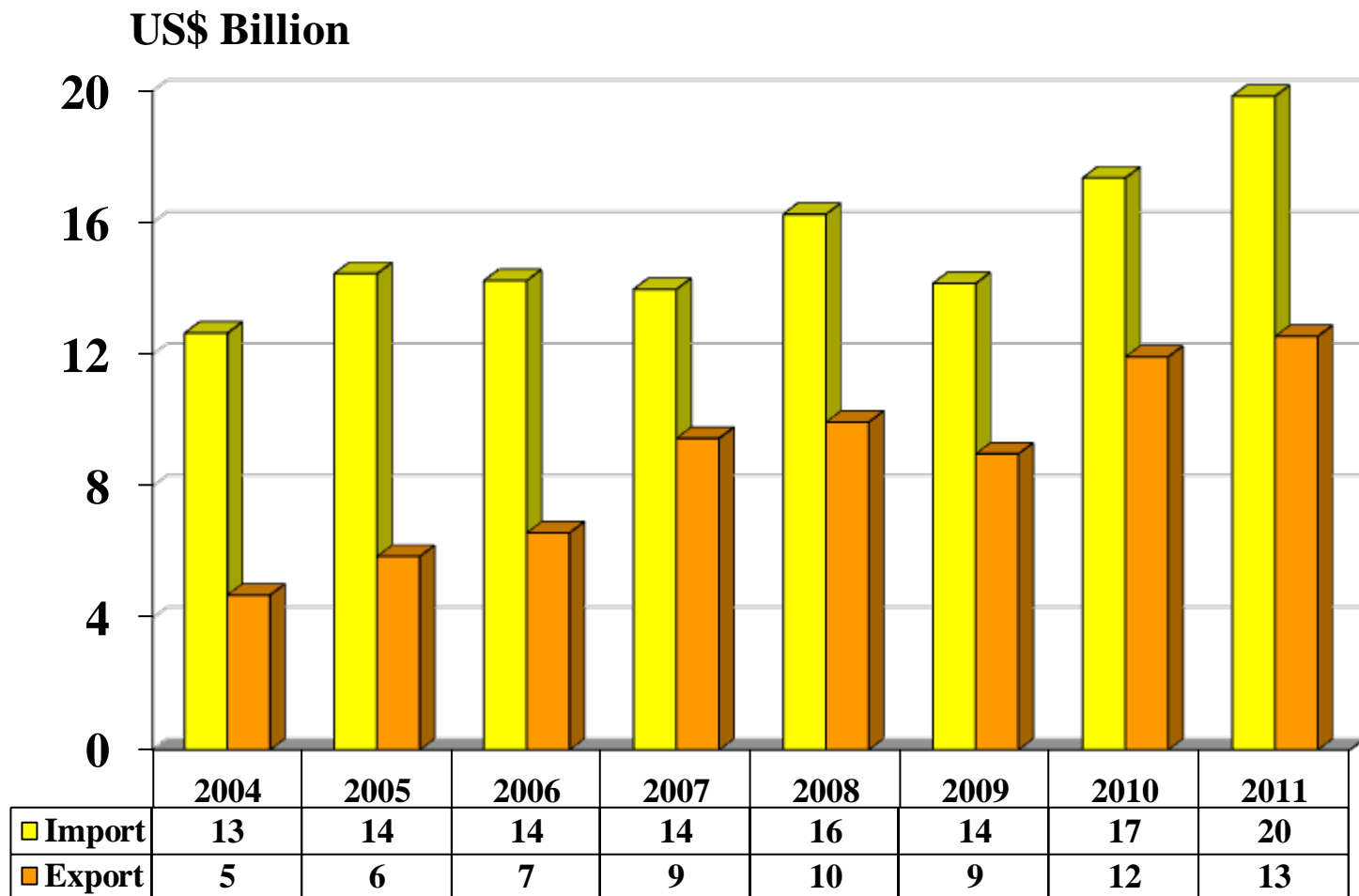
機械行業



Machinery to meet demand is in demand
機械因滿足需求，而被需求

MACHINERY AND PARTS: IMPORTS AND EXPORTS, 2004 – 2011

2004年-2011年泰國工業機械及其零配件進出口概況



GREEN TECHNOLOGIES

環保科技



Thailand's Alternative Energy Development Plan

泰國替代能源發展計畫

Target 25 % of RE in Total Energy Consumption By 2021

目標為2021年前，再生能源佔總能源消耗的 25 %

Solar 太陽能	Wind 風力	Hydropower 水力	New type of energy 新種能源	
2,000	1,200	1,608MW	Tidal Wave 潮汐	Geothermal 地熱
MW	MW		2MW	1MW
3,200MW			3MW*	

Bio energy 生質能源			Bio fuel 生質燃料		
Biomass 生物質	Biogas 生質氣體	Solid waste 固體垃圾	Ethanol 乙醇	Bio-diesel 生質柴油	New types to replace diesel (hydrogen) 新種替代柴油 (氫氣)
3,630MW	600MW	160MW	9ML/d**	5.97ML/d	25ML/d
4,390MW			To substitute for fossil fuels by 44% 替代44%的化石燃料		

“ADDER” : FEED-IN PREMIUMS 定期關稅補助

Fuel 燃料	Adder 補助 (B/kWh)	Supporting period 支持期限 (Year) (年)
<input type="checkbox"/> Biomass 生物能 - Installed capacity <= 1 MW 裝機容量<=1兆瓦 - Installed capacity >1 MW 裝機容量>1兆瓦	0.50	7
	0.30	7
<input type="checkbox"/> Biogas (all categories of production sources) 沼氣 - Installed capacity <= 1 MW 裝機容量<=1兆瓦 - Installed capacity > 1 MW 裝機容量>1兆瓦	0.50	7
	0.30	7
<input type="checkbox"/> Waste (community waste, not hazardous industrial waste, and inorganic waste) 廢棄物 - AD & LFG 沼氣 - Thermal Process 熱工過程	2.50	7
	3.50	7
<input type="checkbox"/> Wind power 風力 - Installed capacity <= 50 kW 裝機容量<= 50 兆瓦 - Installed capacity > 50 kW 裝機容量> 50兆瓦	4.50	10
	3.50	10
<input type="checkbox"/> Mini and micro hydropower 小型微型水電廠 - capacity 50-200 kW 裝機容量50-200兆瓦 - capacity < 50 kW 裝機容量<兆瓦	0.80	7
	1.50	7
<input type="checkbox"/> Solar power	6.50	10

BOI Services

投资委服务

BOI SUPPORT SERVICES 投資委服務支持

**Sectional divisions to guide
you through the process**
各職能事務處為您保駕護航

Investment Matchmaker Program
投資對接計劃

**1-Stop for visas & work permits:
work permits in 3 hours**
一站式服務：三小時內完成簽證，工作證辦理

**Industrial Subcontracting Services
Vendors meet customers program
(BUILD Unit)**
工業分包商服務：分包商與客戶面對面計劃
(投資委工業連接發展事物組)

ASEAN Supporting Industry Database
東協補助產業書籍庫

**Interaction with other govt. agencies
on behalf of investors**
為投資者接洽其它政府部門

Country desks多國事務小組 e. g. Chinese desk

Overseas offices海外辦事處

BUILD Activities

投資委工業聯繫發展辦公室業務

- Provide information on subcontracting opportunities in Thailand via database web applications
- 利用數據庫網絡應用程序提供有關泰國境內分包商資訊。
- Assist foreign buyers wishing to source from Thai manufacturers
- 協助欲以泰國境內製造商為供應源的外國買主。
- Match buyers and subcontractors in related businesses
- 外國買主與相關產業對接。
- Arrange participation of Thai manufacturers in trade shows and exhibitions abroad
- 安排泰國製造商參加國外貿易展。

ASEAN Supporting Industry Database (ASID)

东盟产业数据库

www.asidnet.org

- Information and profiles of companies in supporting industries and manufacturers of parts and components in 10 ASEAN countries 在东盟十个成员国之间，提供零部件制造商和配套产业公司的信息与概况



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