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THAILAND BOARD OF INVESTMENT

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迈向亚洲，投资泰国

DR. ATCHAKA SIBUNRUANG

Secretary General

Thailand Board of Investment (BOI)

September 23, 2011

Shenzhen, China

泰国投资促进委员会秘书长

阿查卡·希本栾

2011年9月23日

中国深圳

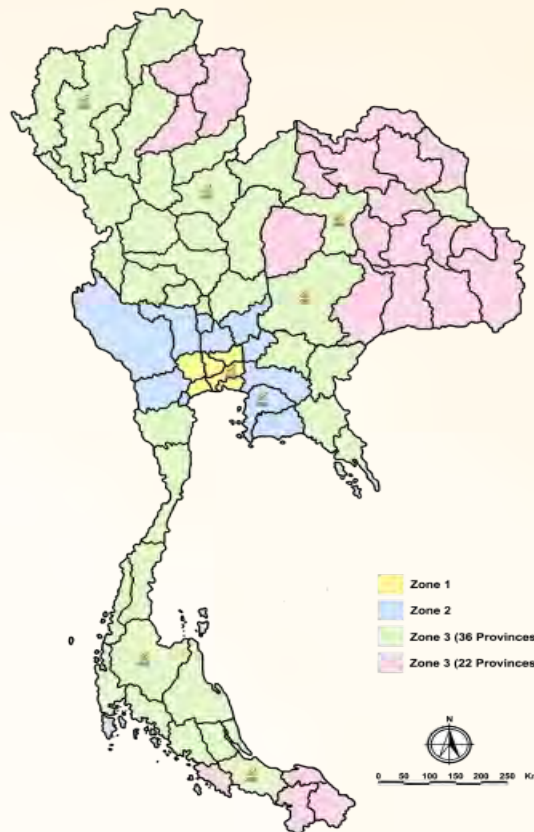
Outline of Presentation

提纲

- **Thai Economy in Brief: 泰国经济简介**
- **BOI Introduction: 投资委简介**
- **BOI Incentive 投资委的优惠政策**
- **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 in 2010

2010年泰国概况

(1 USD = 30.24 THB 1美元 = 30.24 泰铢)

Thai population 泰国人口	67 million 6,700万
Thailand's GDP 泰国国内生产总值	334.13 billion USD 3,341.3亿美元
Thai labor force 泰国劳动力	38.6 million 3,860万
Thai exports 泰国出口	204.25 billion USD 2,042.5 亿美元
Thai imports 泰国进口	193.10 billion USD 1,931.0 亿美元
GDP per capita 人均国内生产总值	4,749.11 USD per year 4,749.11 美元/年

Economic Comparisons

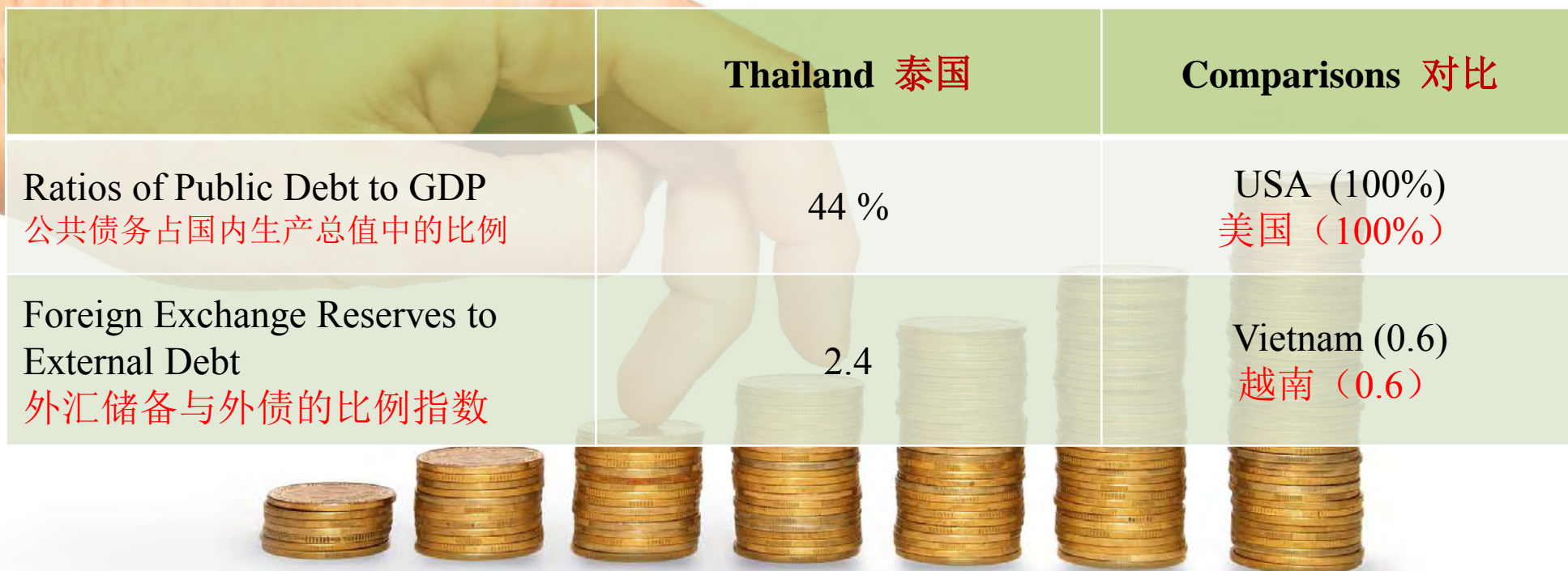
经济对比

	Thailand 泰国	Comparisons 对比
Populations 人口	64 million 6,400万	≈ Hunan, China ≈ 中国, 湖南省
GDP at market price 国内生产总值	320,000 million USD 3,200 亿美元	≈ Henan, China ≈ 中国, 河南省
GDP per capita 人均生产总值	5,000 USD 5,000美元	≈ Fujian, China ≈ 中国, 福建省



Thailand's Economic Stability

泰国经济稳定



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

Thailand's Top 10 Exports in 2009 – 2011 (Jan - July)

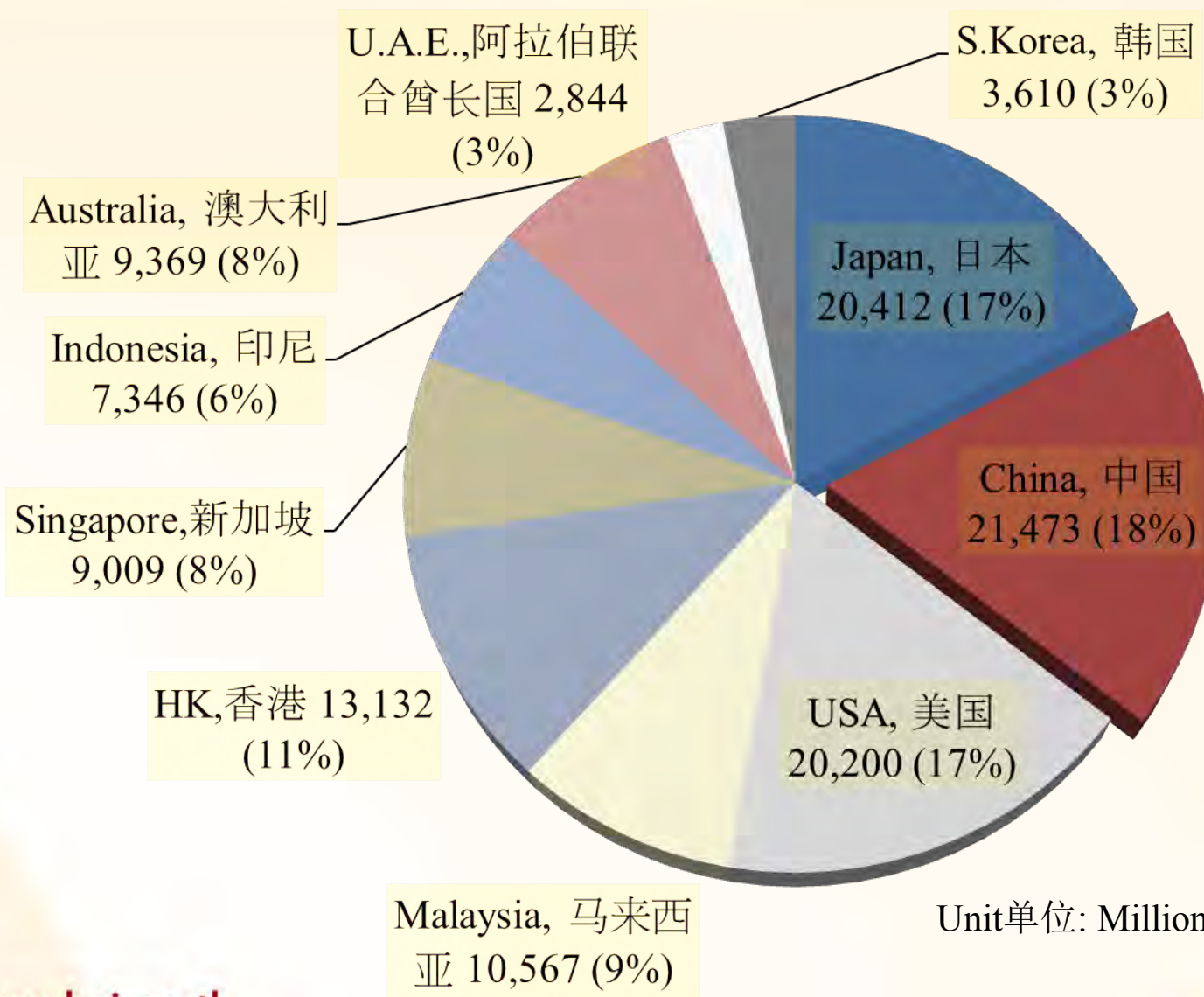
2009-2011年（一月至七月）泰国十大出口产品

Unit: Billion USD 单位: 十亿美元	2009	2010	2010 (Jan-July) (一至七月)	2011 (Jan-July) (一至七月)	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	10.76	10.71	-0.59
Motor cars, parts and accessories 摩托车及其零配件	11.12	17.71	9.95	10.37	4.18
Precious stones and jewelery 珠宝	9.76	11.65	6.34	8.06	27.17
Rubber 橡胶	4.30	7.89	4.18	7.52	79.83
Polymers of ethylene, propylene, etc in primary forms 乙烯与丙烯等初级聚合物	4.46	6.34	3.42	5.23	52.62
Integrated circuits 电子集成电路	6.44	8.06	4.51	4.93	9.25
Chemical products 化工产品	4.46	5.77	3.15	4.80	52.21
Refine fuels 提炼燃料	5.42	7.07	3.73	4.73	26.82
Rubber products 橡胶制品	4.48	6.43	3.54	4.72	33.52
Rice 大米	5.04	5.34	2.73	4.14	51.43
Others 其他	80.89	100.17	56.27	73.31	26.73
Total 总计	152.43	195.31	108.59	136.50	25.70

Source: MOC, as of September 15, 2011 数据来源: 泰国商务部, 2011年9月15日

Thailand's Major Export Destinations in 2010

2010年泰国主要出口分布图



Unit单位: Million USD 百万美元

Thailand's Top 10 Imports in 2009 – 2011 (Jan - July)

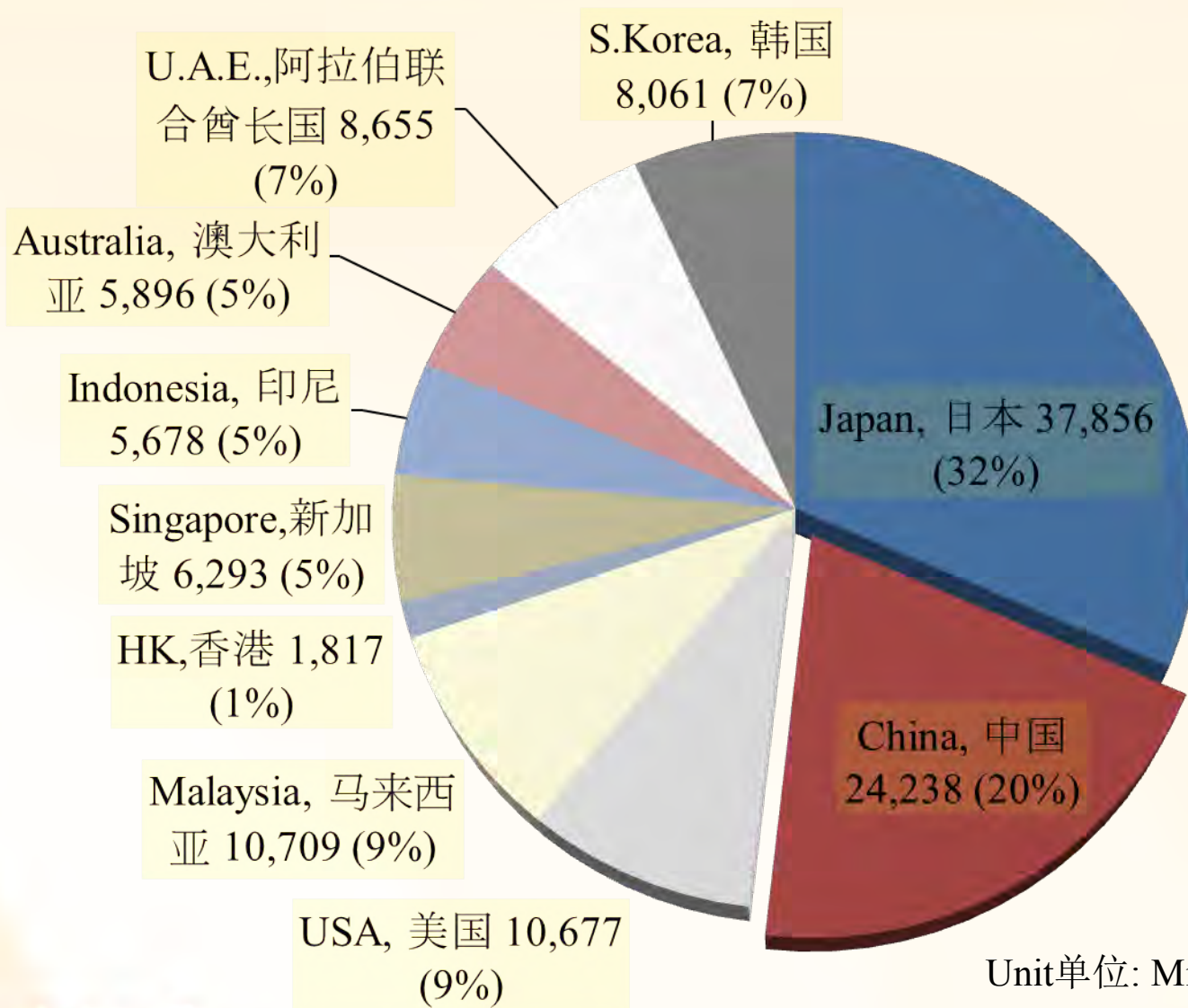
2009-2011年（一月至七月）泰国十大进口产品

Unit: Billion USD 单位：十亿美元	2009	2010	2010 (Jan-July) (一月至七月)	2011 (Jan-July) (一月至七月)	Growth (yoy) 同比
Crude oil 原油	19.11	23.90	12.95	18.90	45.99
Machinery and parts 机械及其零配件	12.07	16.72	9.34	10.60	13.48
Chemicals 化工	8.66	12.58	7.27	8.87	22.10
Jewelry /precious metal 金银珠宝	5.47	9.87	6.79	8.23	21.24
Electrical machinery and parts 电子机械及其零配件	9.39	12.16	6.74	7.78	15.44
Iron, steel and products 钢铁产品	7.38	11.72	6.53	7.71	17.98
Integrated circuits 电子集成电路	8.10	10.76	6.14	6.53	6.38
Other metal ores, metal waste scrap, and products 其他金属原矿、废料及产品	4.74	7.51	4.16	5.53	32.83
Computers, parts and accessories 电脑及其零部件	6.82	8.14	4.71	5.37	14.09
Parts and accessories of vehicles 汽车零配件	3.37	5.91	3.17	3.54	11.52
Others 其他	48.49	63.08	35.48	47.19	33.02
Total 总计	133.66	182.40	103.27	130.25	26.12

Source: MOC, as of September 15, 2011 数据来源：泰国商务部，2011年9月15日

Thailand's Major Source of Imports in 2010

2010年泰国主要进口来源图



Unit单位: Million USD 百万美元



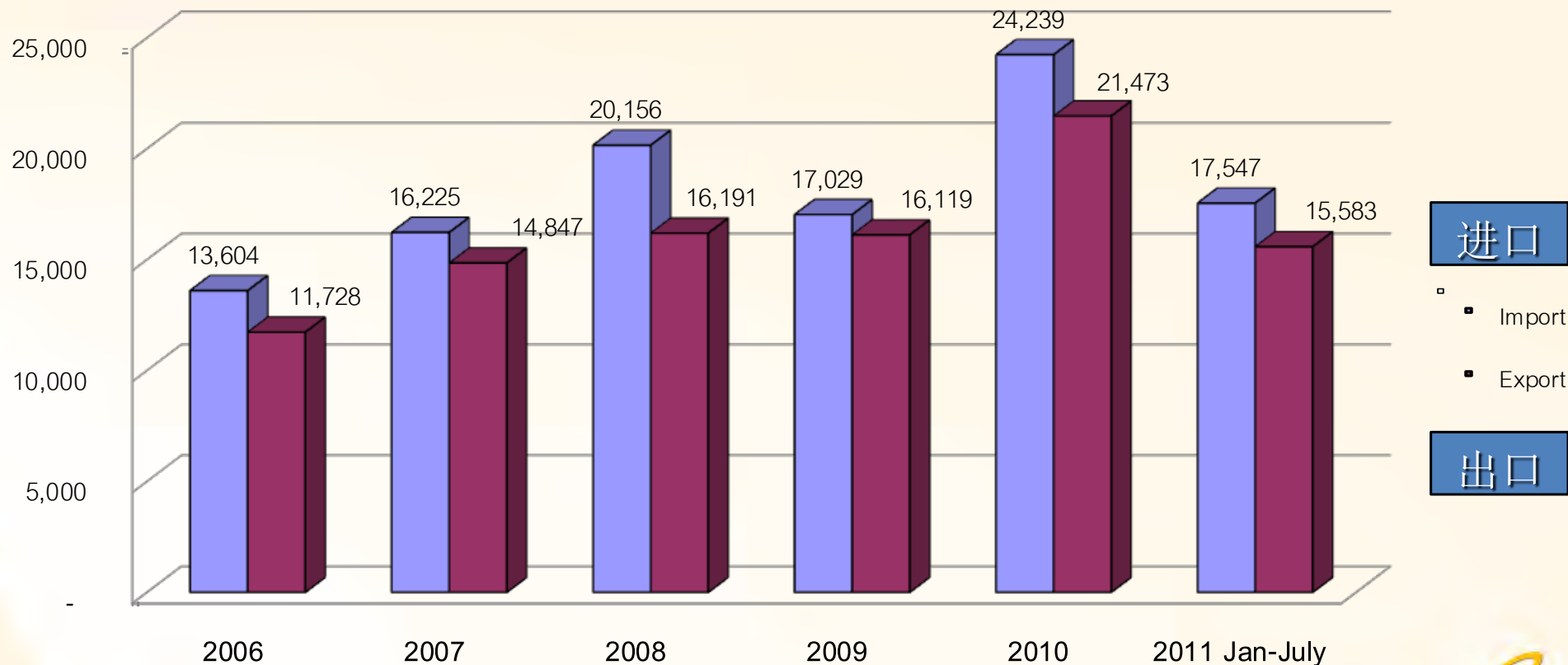
THAILAND BOARD OF INVESTMENT

Your partner for sustainable investment

Trade Summary between Thailand / China

泰中贸易概要 (1 USD = 6.5 RMB 1美元=6.5人民币)

单位：亿元 100 Million Yuan



SOURCE : INFORMATION AND COMMUNICATION TECHNOLOGY CENTER WITH COOPERATION OF THE CUSTOMS DEPARTMENT AS OF September 15, 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9月15日

Top 5 Export Items to China from Thailand 2008-2011 (Jan-July) 2011年(一月至七月)泰国出口到中国的前五类产品

Unit: Million USD 单位：百万美元	2008	2009	2010	2010 (Jan-July) (一月至七月)	2011 (Jan-July) (一月至七月)	Growth (yoy) 同比
Automatic data processing machines and parts thereof 自动数据处理设备及其零配件	4,821.8	4,327.3	5,036.7	3,047.9	2,823.8	-7.35
Rubber 橡胶	1,937.5	1,554.0	2,446.3	1,191.4	2,364.8	98.48
Chemical products 化工产品	817.1	1,359.7	1,790.4	953.8	1,357.7	42.36
Polymers of ethylene, propylene, etc in primary forms 乙烯与丙烯等初级聚合物	1,075.3	1,082.3	1,631.5	801.3	1,305.0	62.87
Rubber products 橡胶制品	480.3	783.9	1,412.0	771.8	1,081.4	40.11
Others 其他	7,058.7	7,012.2	9,156.3	5,003.9	6,650.0	32.90
Total 总计	16,190.6	16,119.4	21,473.2	11,770.0	15,582.8	32.39

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

2011年(一月至七月)泰国从中国进口的前五类产品

Unit: Million USD 单位：百万美元	2008	2009	2010	2010 (Jan-July) (一月至七月)	2011 (Jan-July) (一月至七月)	Growth (yoy) 同比
Computers, parts and accessories 电脑设备及其零配件	2,785.7	2,757.1	3,370.0	1,942.7	2,407.8	23.94
Electrical Machinery and parts 电子机械及其零配件	2,374.8	2,448.9	3,220.1	1,769.5	2,273.7	28.50
Electrical Household appliance 家用电器	1,812.4	1,647.9	2,142.1	1,157.4	1,707.9	47.56
Machinery and parts 机械及零配件	1,616.4	1,393.8	2,137.9	1,212.2	1,573.8	29.83
Chemicals 化工产品	1,466.9	1,144.5	1,682.0	940.5	1,301.2	38.35
Others 其他	10,100.1	7,636.8	11,685.5	6,499.8	8,282.6	27.43
Total 总计	20,156.3	17,028.9	24,237.5	13,522.0	17,546.9	29.77

BOI Introduction

投资委简介

BOI Introduction

投资委简介

- The Office of the Board of Investment is a government agency under the Ministry of Industry.

泰国投资促进委员会是泰国工业部下属的一个政府机构。

- **Chairman : Prime Minister**

投资委主席：泰国总理

- The main roles and responsibilities are in promoting investment for foreign and local investors by “Tax - based incentives” and “Non - Tax incentives”.

主要职责与义务是以税收和非税收激励措施，鼓励国内外投资者来泰投资。

BOI Incentive

投资委的优惠政策

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)

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

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

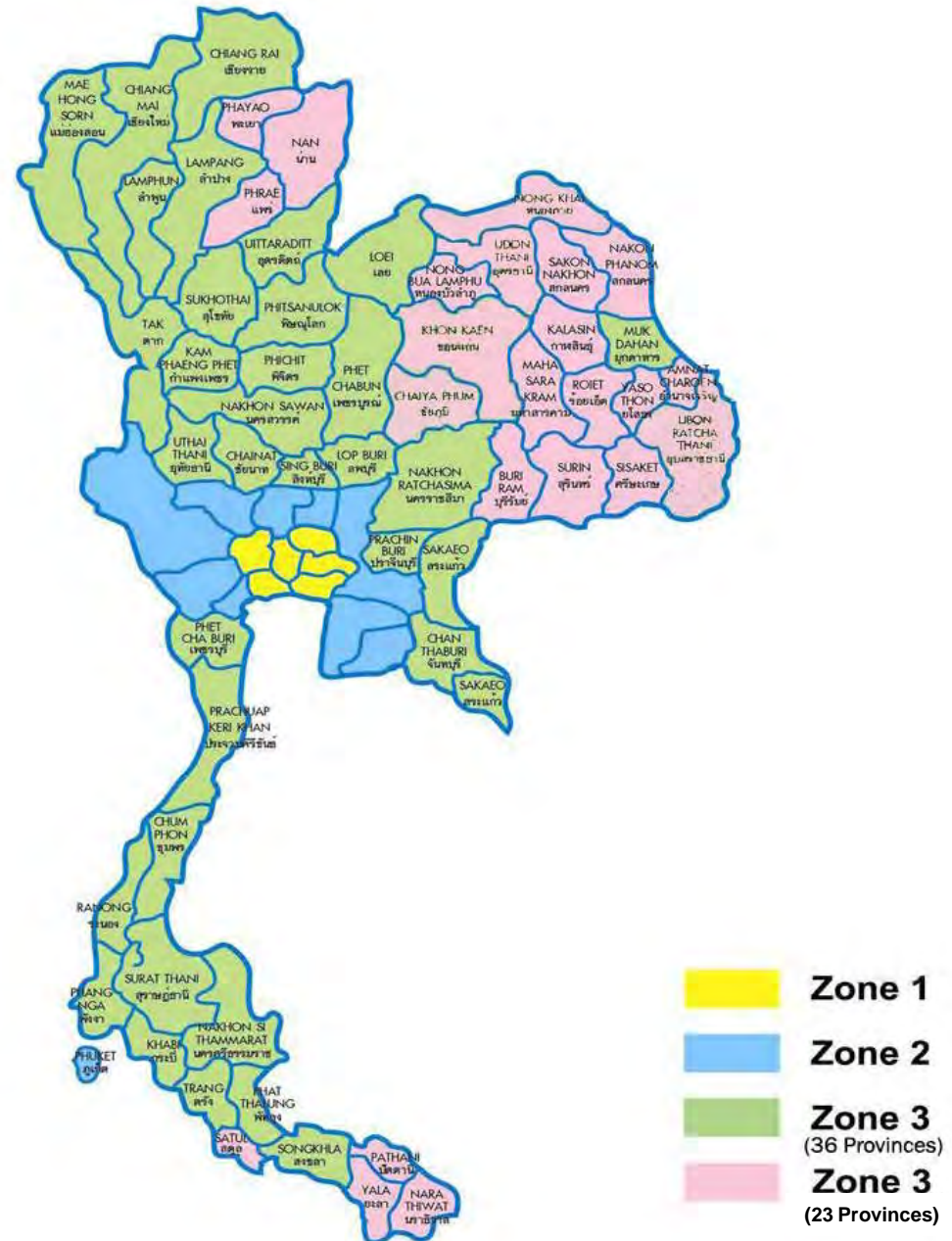
Zone 3 (59 provinces) – Investment Promotion Zone

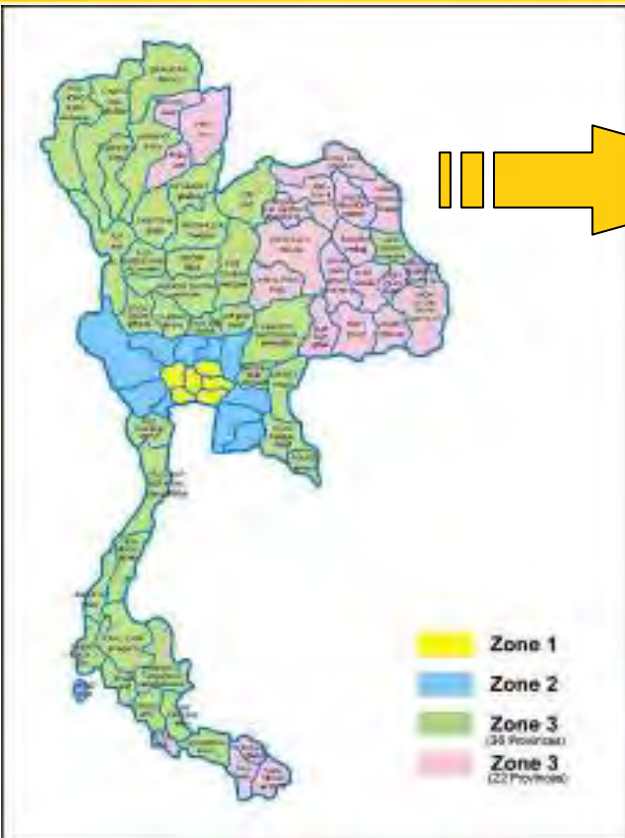
三区：五十九府（又分为两个副区）

(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





Zone-Based Incentives :

区域差异优惠

- Zone 1 一区
- Zone 2 二区
- Zone 3 三区

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

Examples of Priority Activities 优先产业列举

- Agriculture and agro-industries 农业和农用工业
- R&D 研发行业
- Software development 软件开发业
- Molds & Dies 模具行业
- Biotechnology 生物技术业
- Alternative energy 替代能源行业
- Manufacture of hi-tech products e.g. advanced ceramics 高科技行业，如：精密陶瓷

Additional Incentive Package for STI (Skill, Technology & Innovation) 技术技能创新计划额外投资优惠

Privileges will be based on the project's total investment in STI expenditures in any of the following four STI categories:

投资优惠力度取决于项目在如下方面对技术、技能、创新环节的总投资情况：

- Research and development or design 研发设计
- Advanced technology training 先进的技术培训
- Support for educational and research institutes 对教学研究机构的支持
- Contribution to the Science and Technology Fund 对科技经费的投入

Criteria in Granting STI Incentives 技术技能创新的给予标准

Required STI Investment & Expenditures 技术技能创新 (STI) 资金投入标准	Additional Year of Corporate Income Tax Exemption 额外免法人所得税年限	Exemption of Import Duties on Machinery 免机械进口税	Removal of Corporate Income Tax Exemption Cap 无免法人所得税总额上限
1% of the first 3 years' sale or at least 150 million baht, whichever is less 头三年销售额的1%或至少1.5亿泰铢	1	✓	✓
2% of the first 3 years' sale or at least 300 million baht, whichever is less 头三年销售额的2%或至少3亿泰铢	2	✓	✓
3% of the first 3 years' sale or at least 450 million baht, whichever is less 头三年销售额的3%或至少4.5亿泰铢	3	✓	✓

“Investment Promotion Policy for Sustainable Development 2010-2012” 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



BOI FAIR 2011

2011年泰国投资委博览会



Organized by Thailand Board of Investment

泰国投资促进委员会组织举办

“Going Green for the Future” 迈向绿色的未来



Show date : 10 - 25 November 2011

博览会时间 : 2011年11月10日-25日

Venue : IMPACT Exhibition and Convention Center

地点 : 曼谷会议展览中心

Exhibitors : 84 Outdoor Pavilions and more than 3,000
Indoor Booths

参展单位 : 84家室外展馆和3千多家室内展台

Visitors : More than 5 million visitors

访客 : 5百多万人

Activities : BOI FAIR 2011

2011年泰国投资委博览会活动

- More than 200 seminars on various topics will be held throughout the event
博览会期间将举办2百余场不同主题的研讨会。
- CEO Forum and Business matching
- CEO论坛大会和商务对接会。
- Other activities, such as BOI recommended food shops, tourism, and entertainment
其他活动，如泰国投资委推荐的食物、观光和娱乐等。

BOI Offices BOI 办事处

Thailand 泰国

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一站式投资服务中心

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谢谢

