

Thailand's Economic Situation and Investment Environment

泰國經濟狀況和投資環境

Dr. Atchaka Sibunruang 阿查卡•希本樂博士
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Thailand Board of Investment 泰國投資促進委員會

20 August 2012, Taiwan

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Outline 概述

- Thailand in Brief
泰國簡介
- Why Thailand
選擇泰國的原因
- Investment Incentives and Opportunities
投資環境与優惠政策
- BOI Services
投資委服务

THAILAND IN BRIEF

泰國簡介

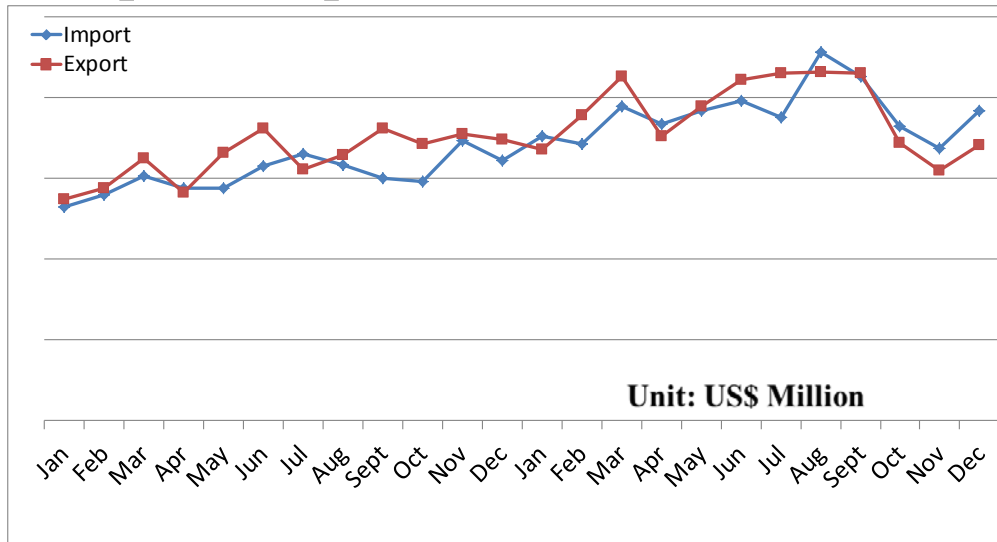
Thailand in Brief 泰國概況



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

GDP per capita(2011):US\$ 5,113
 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，印尼之後的第二大東協經濟體。



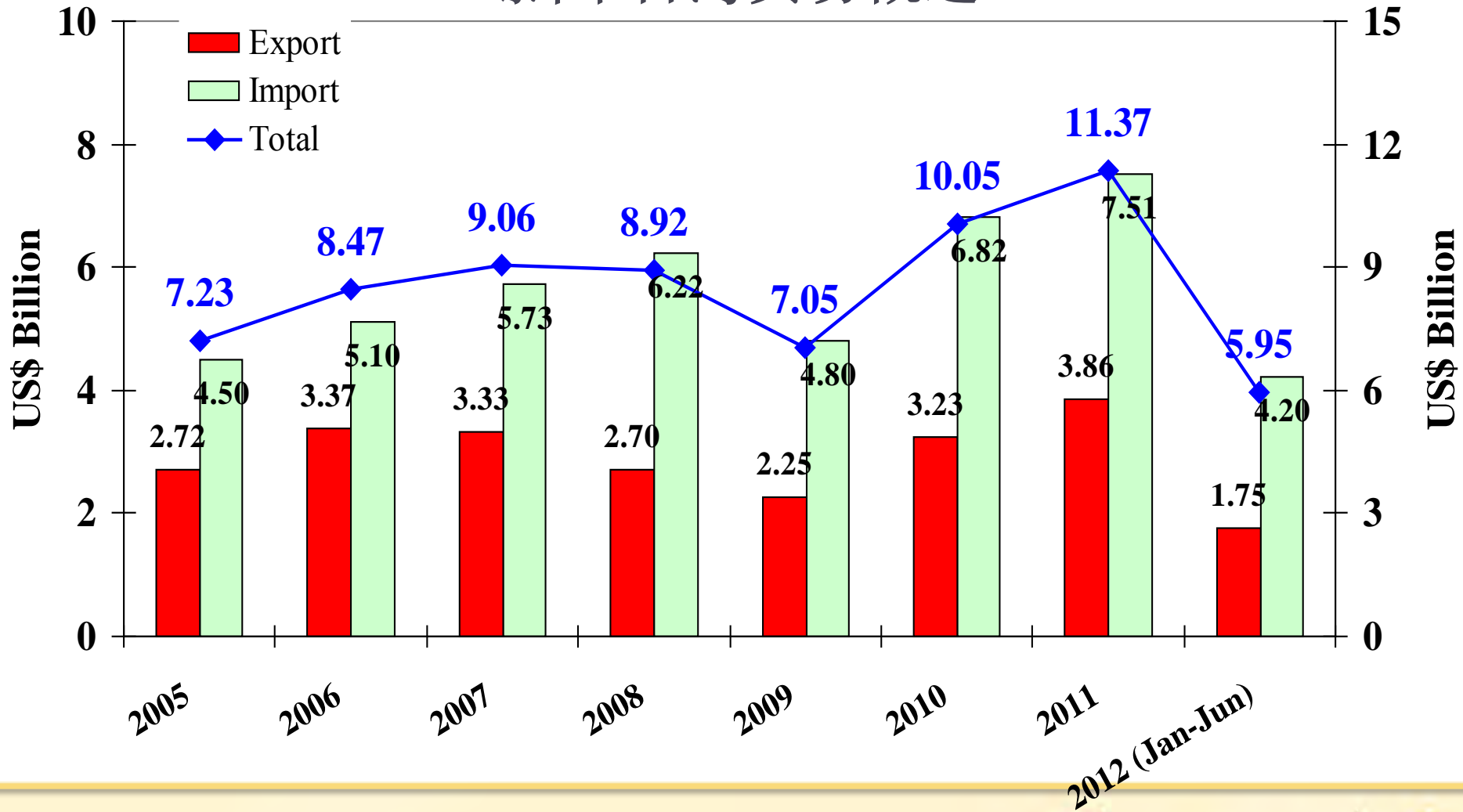
ECONOMIC PROJECTIONS 2011-2013 2011-2013 經濟預測

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	5.7	5.0
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	7.0	10.8
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	14.0	10.1
4) MPI (2000=100) 製造業生產指數	172.56	176.88 (Jan-Jun)	NA
5) Core Inflation 核心膨脹率	2.4	2.2	1.9
6) Headline Inflation 通貨膨脹率	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

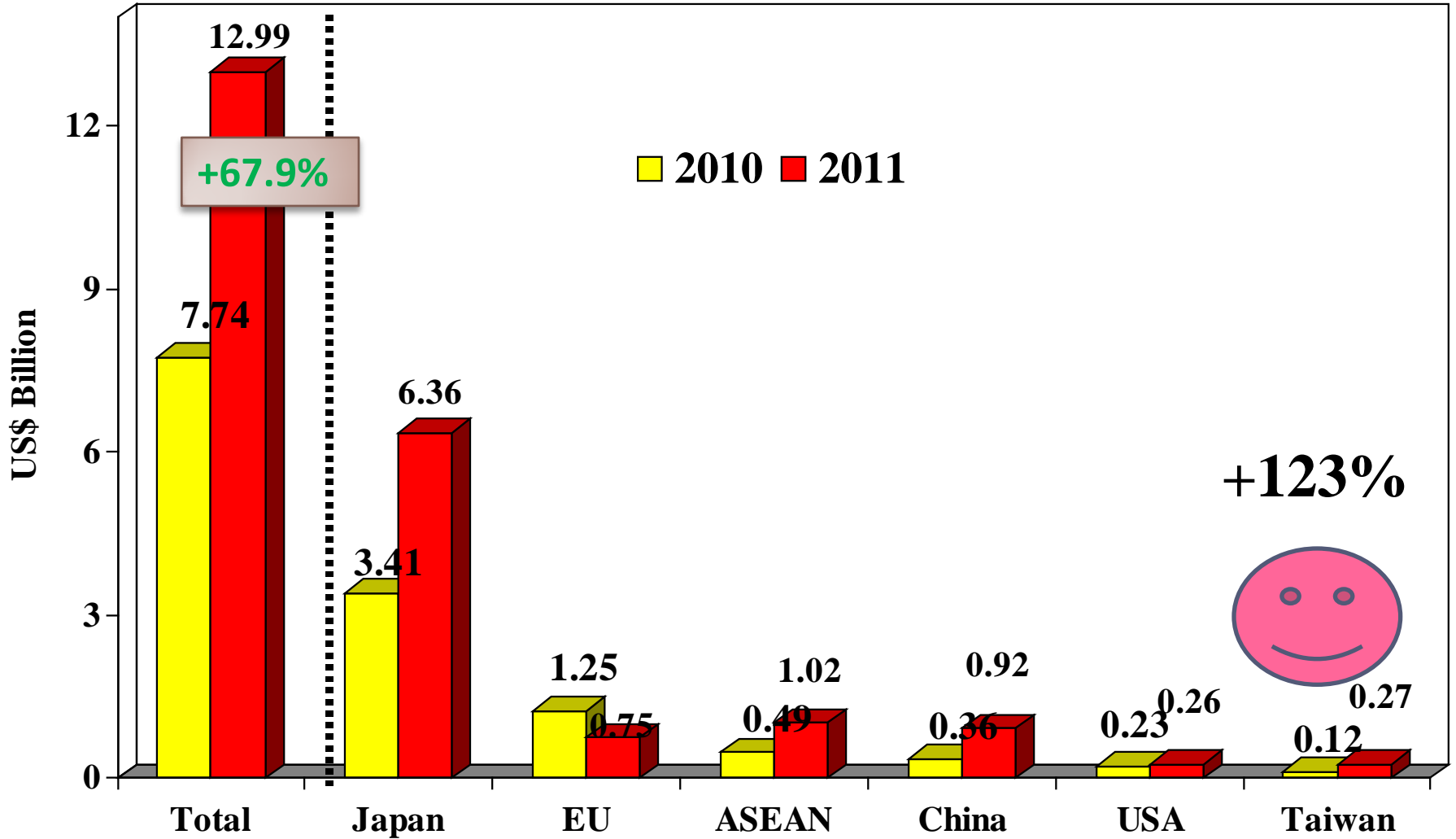
TRADE SUMMARY BETWEEN THAILAND/TAIWAN

泰國-台灣貿易概述



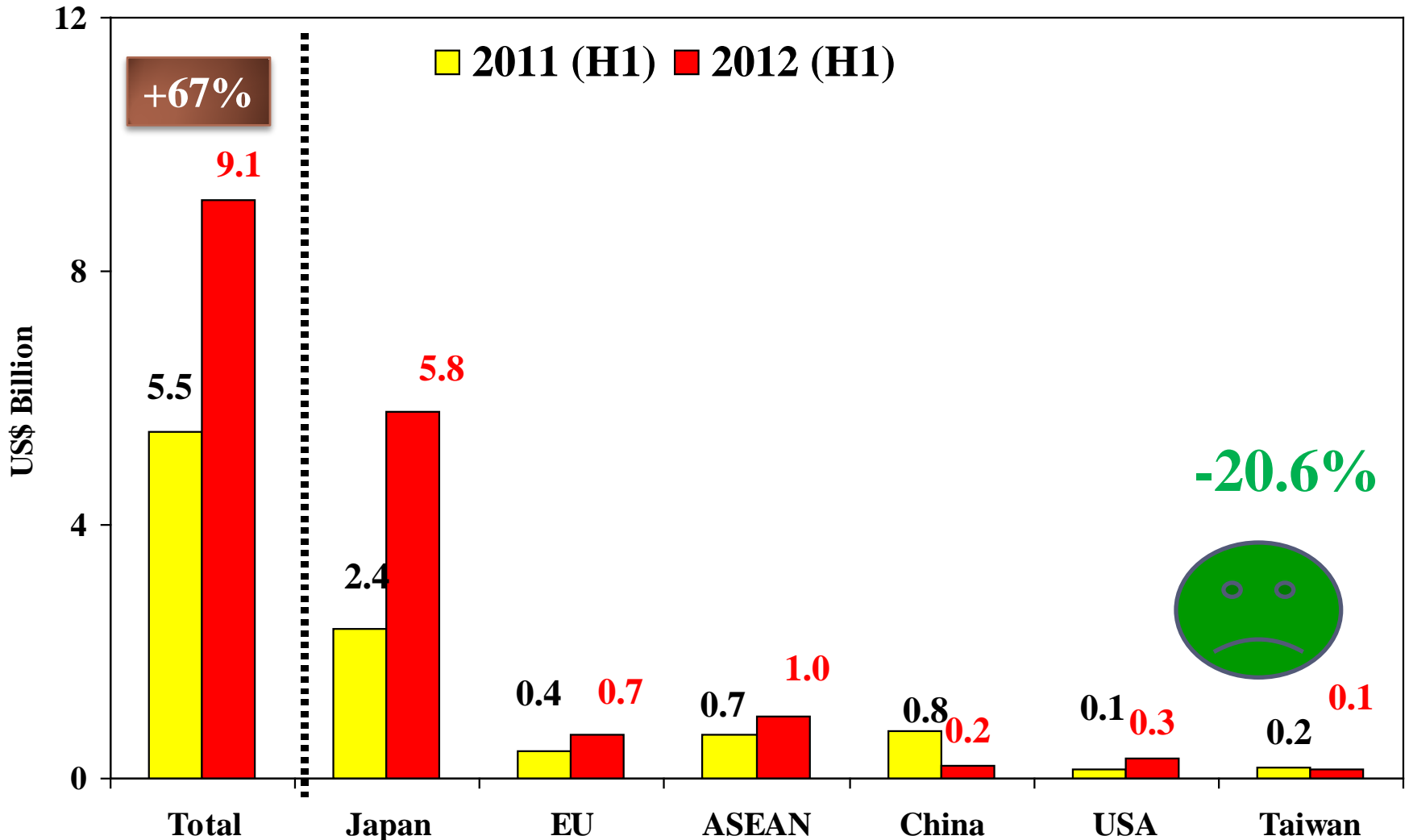
FOREIGN DIRECT INVESTMENT APPLICATIONS

外商直接投資申請



FOREIGN DIRECT INVESTMENT APPLICATIONS

外商直接投資申請



TAIWANESE INVESTMENT APPLICATIONS TOTALS BY SECTOR: 2006 – 2012 (JAN-JUN) 2006-2012年（一月-六月）台灣投資申請案

Sector 產業	Projects 項目	US\$ Million 百萬美元
Agricultural Products 農產品	37	138
Minerals and Ceramics 礦物和陶瓷業	16	71
Light Industries/Textiles 輕工業和紡織品	46	128
Metal Products and Machinery 金屬產品和機械	82	312
Electric and Electronic Products 電子電器產品	62	770
Chemicals and Paper 化工製品和紙	56	133
Services 服務業	44	421
TOTAL 合計	343	1,974

Examples of Taiwanese Investments in Thailand

到泰國投資的台灣企業列子

JTH



LITEON



APCB



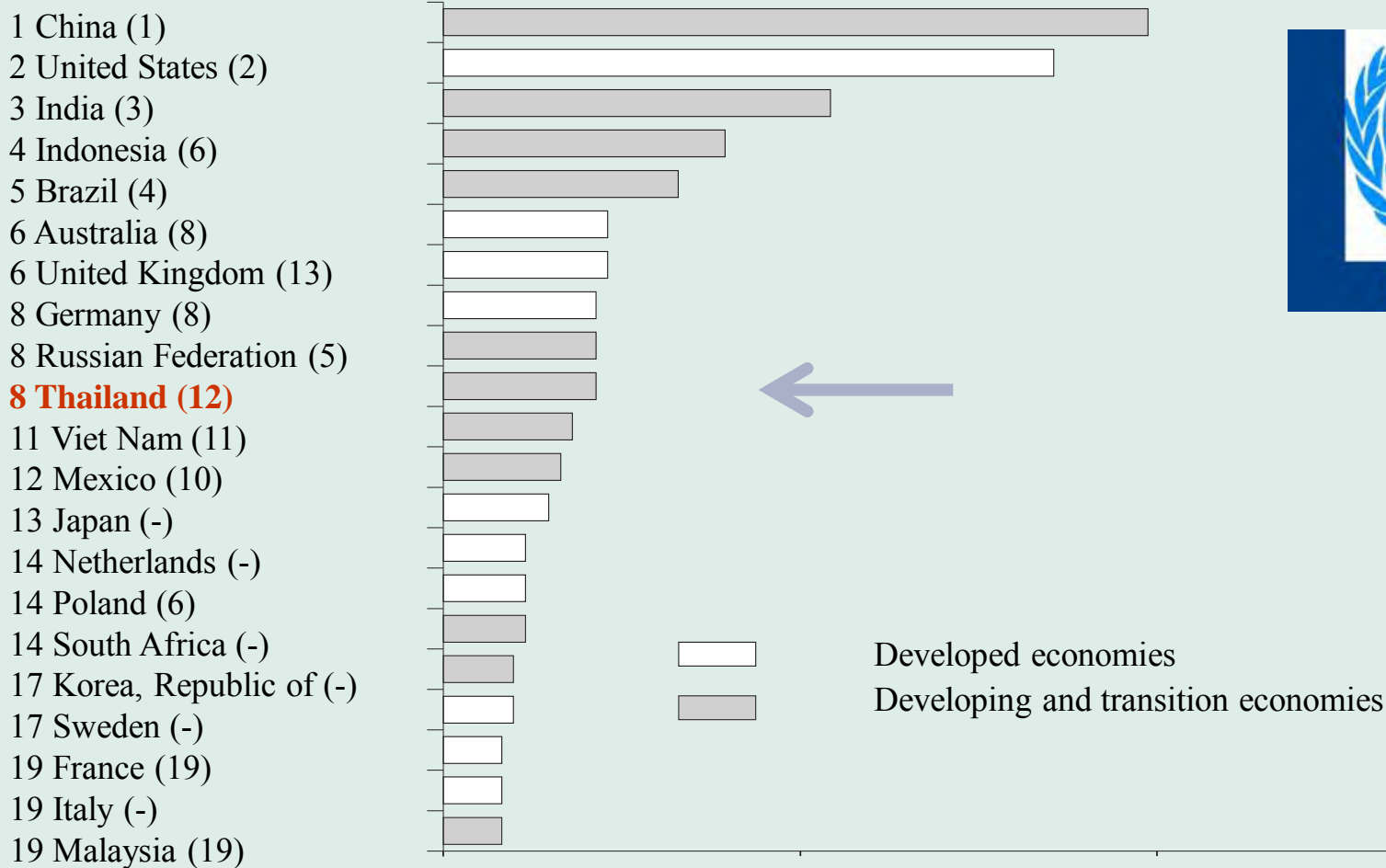
WHY THAILAND

選擇泰國的原因

TNCs' top prospective host economies for 2012–2014
 (Percentage of respondents selecting economy as a top destination)

2012-2014年跨國公司預測最有潛力的經濟體
 (按照調查者所選經濟體的百分比來確定最佳目的國)

(x) = 2011 ranking



Source: UNCTAD Top host economies for FDI 2012-2012 as of July 12, 2012, Survey from 174 TNCs Executives.



1	Singapore 新加坡
17	THAILAND 泰國
18	Malaysia 馬來西亞
83	Brunei Darussalam 汶萊
98	Vietnam 越南
129	Indonesia 印度尼西亞
136	Philippines 菲律賓
138	Cambodia 柬埔寨
165	Laos PDR 老撾

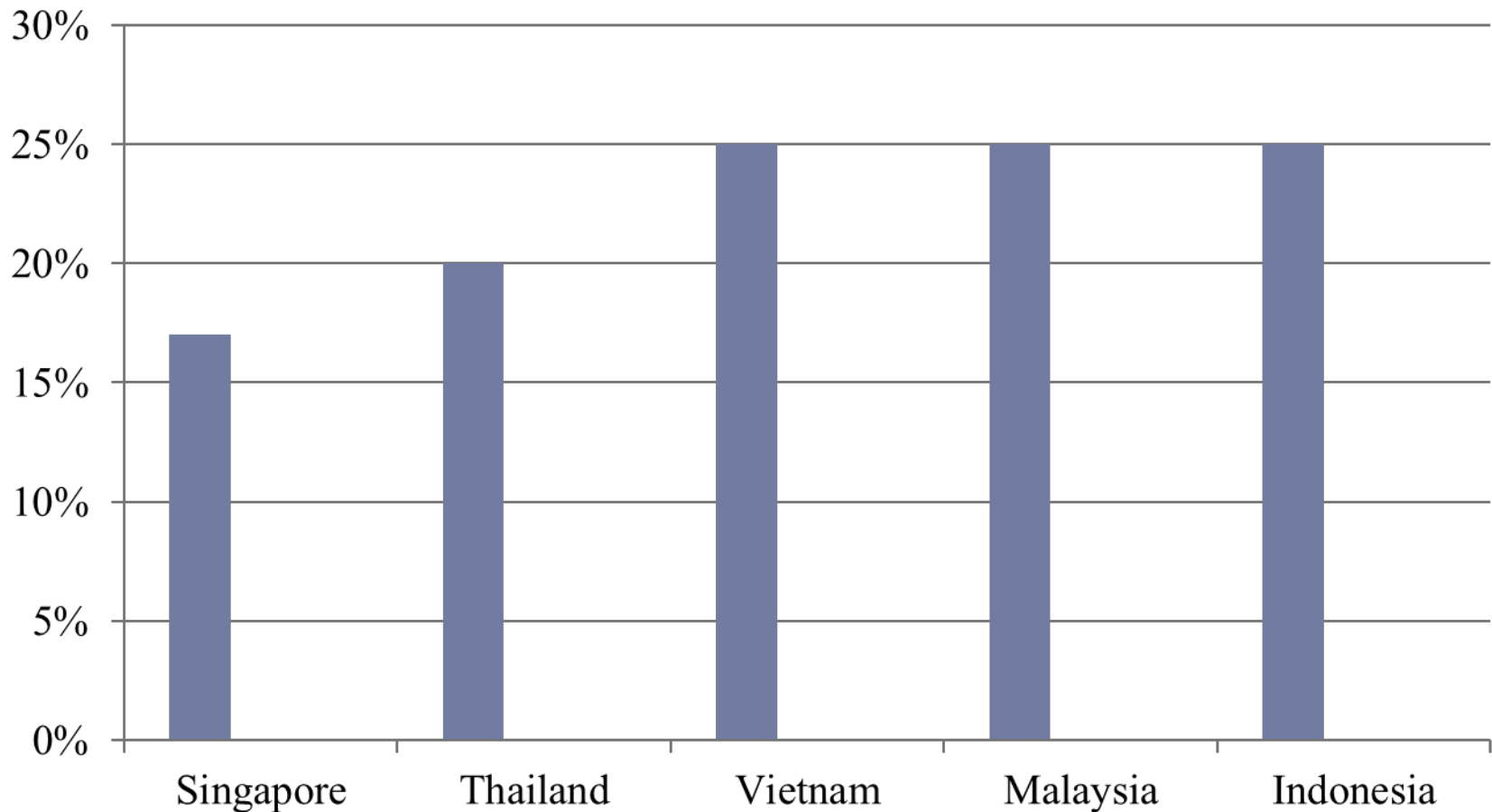
The World Bank ranks Thailand among the easiest places to do business in Asia and 17th in the world
世界銀行評定易商環境國家排名
泰國排在亞洲前列
並排名世界第17名



**Source: Doing Business 2012
World Bank Survey Comparing 183 Countries**

ASEAN Corporate Income Tax 2013

2013年東協企業所得稅

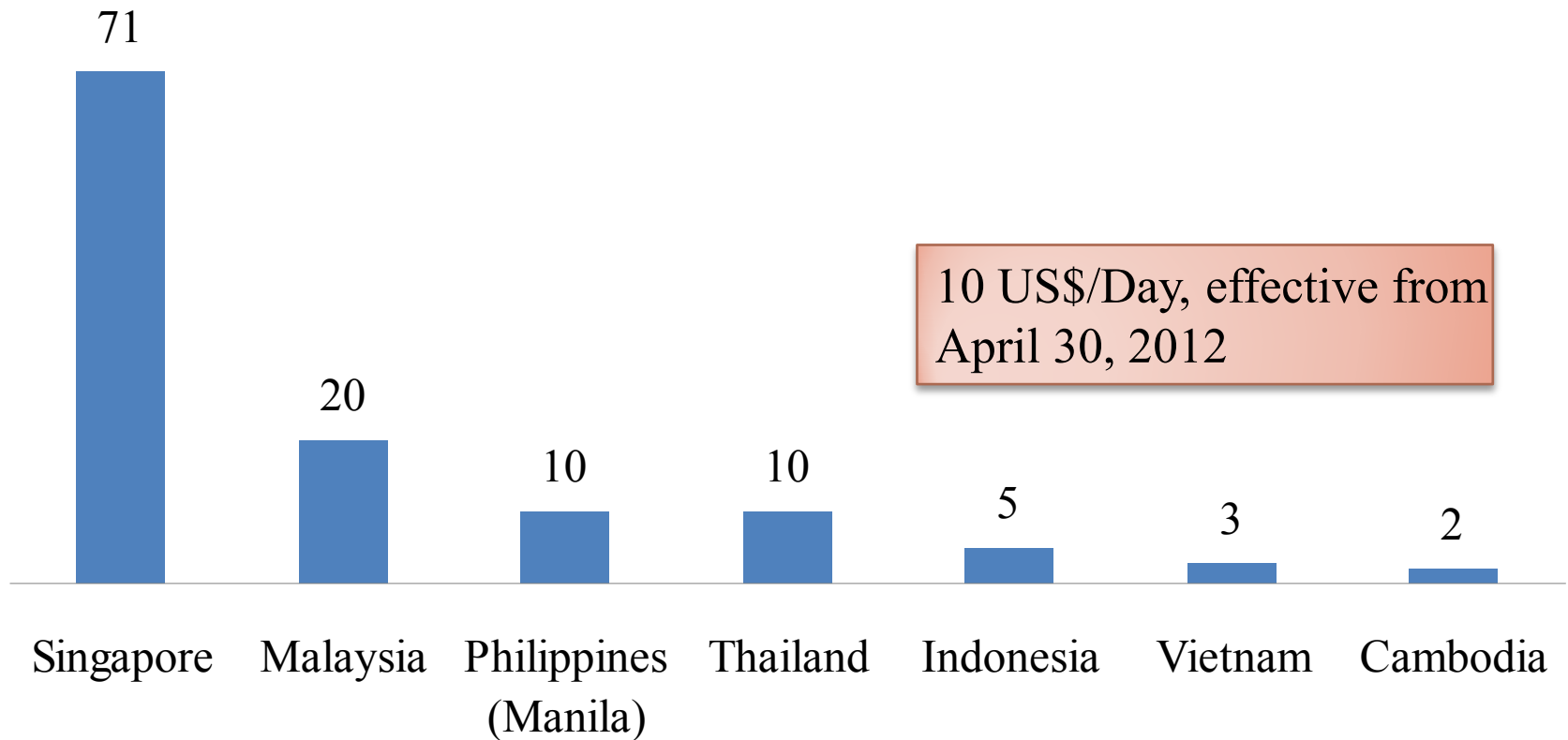


ASEAN LABOR'S MINIMUM WAGE RATE

東協最低工資水平

ASEAN Min. Wage Rate (US\$/Day)

■ US\$/Day



Source: www.bles.dole.gov.ph as of Jun 28, 2012

2012 COST OF LIVING SURVEY

2012年生活成本調查



Cities城市

March
2012

Tokyo東京	1
Singapore新加坡	6
Shanghai上海	16
Taipei台北	58
Jakarta雅加達	61
Bangkok曼谷	81
Kuala Lumpur 吉隆坡	102
Hanoi河內	136



AEC SNAPSHOT東協經濟共同體概述



Macro-Economic Basics

宏觀經濟基礎

- GDP (2011): US\$2,112.4 Bn*
國內生產總值(2011):21,124億美元
- GDP per capita: US\$3,376
人均國內生產總值: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: 6億人
- Area: 4.46 million km²
面積: 446萬平方米

- IMF Forecast
國際貨幣基金組織預測

Thailand is ready toward AEC 2015

泰國為2015年東協經濟共同體合作蓄勢待發



4 POTENTIAL ROUTES CONNECTING GMS RAILWAY DEVELOPMENT 2025

4條連接大湄公河次區域線路 2025年鐵路發展



- Route 1: Bangkok-Phnom Penh-Ho Chi Minh City-Kunming
- 第1線路:曼谷-金邊-胡志明市-昆明
- Route 2: Bangkok-Vientiane-Kunming (via Boten/Mohan)-Hanoi/Ho Chi Minh City
- 第2線路:曼谷-萬象-昆明(途徑磨丁/莫漢)-河內/胡志明市
- Route 3: Bangkok-Vientiane-Hanoi/Ho Chi Minh City (via Tha Khaek-Mu Gia-Vung Ang)-Kunming
- 第3線路:曼谷-萬象-河內/胡志明市(途徑他曲-穆嘉關-萬安)-昆明
- Route 4: Bangkok-Kunming (via Chiang Rai-Boten-Mohan)-Hanoi/Ho Chi Minh City
- 第4線路:曼谷-昆明(途徑清萊-磨丁-莫漢)-河內/胡志明市

Existing lines 現有路線
 Missing links 缺失路線

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

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
TOTAL	29,971,293

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

High Speed Train 高速列車

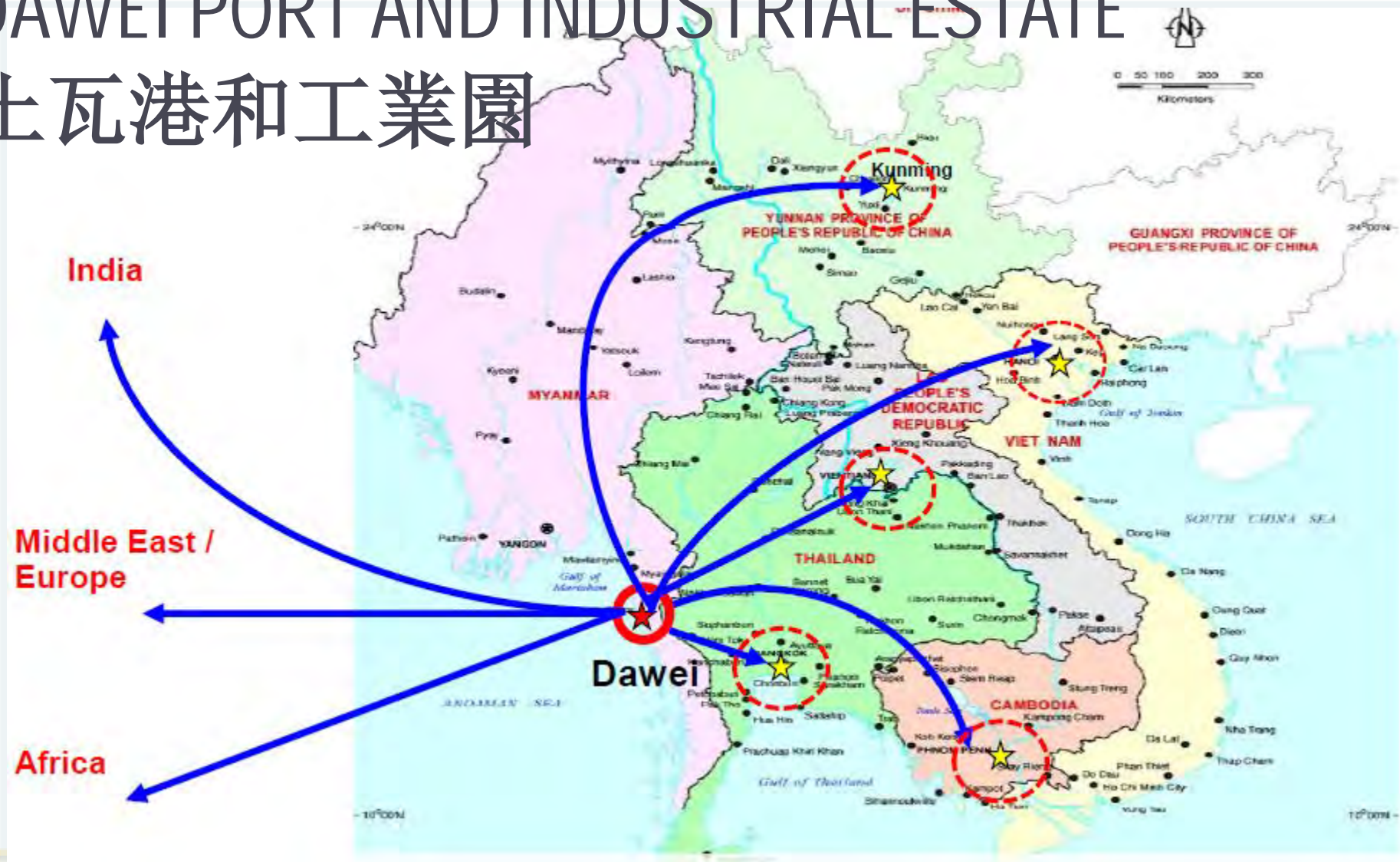


Route 路線	From 自	To 到	Distance 距離	Budget 預算 (Million US\$) (百萬美元)
North 北部	Bang Sue 挽是	Chiang Mai 清萊府	745 km. 745公里	7,300
North-East 東北部	Bang Sue 挽是	Nong Khai 廊開府	615 km. 615公里	3,100
East 東部	Makkasan 瑪卡訥	Rayong 羅勇府	330 km. 330公里	2,300
South 南部	Bang Sue 挽是	Hua Hin 華欣府	225 km. 225公里	2,600



DAWEI PORT AND INDUSTRIAL ESTATE

土瓦港和工業園





Investment Incentives and Opportunities

投資環境与優惠政策

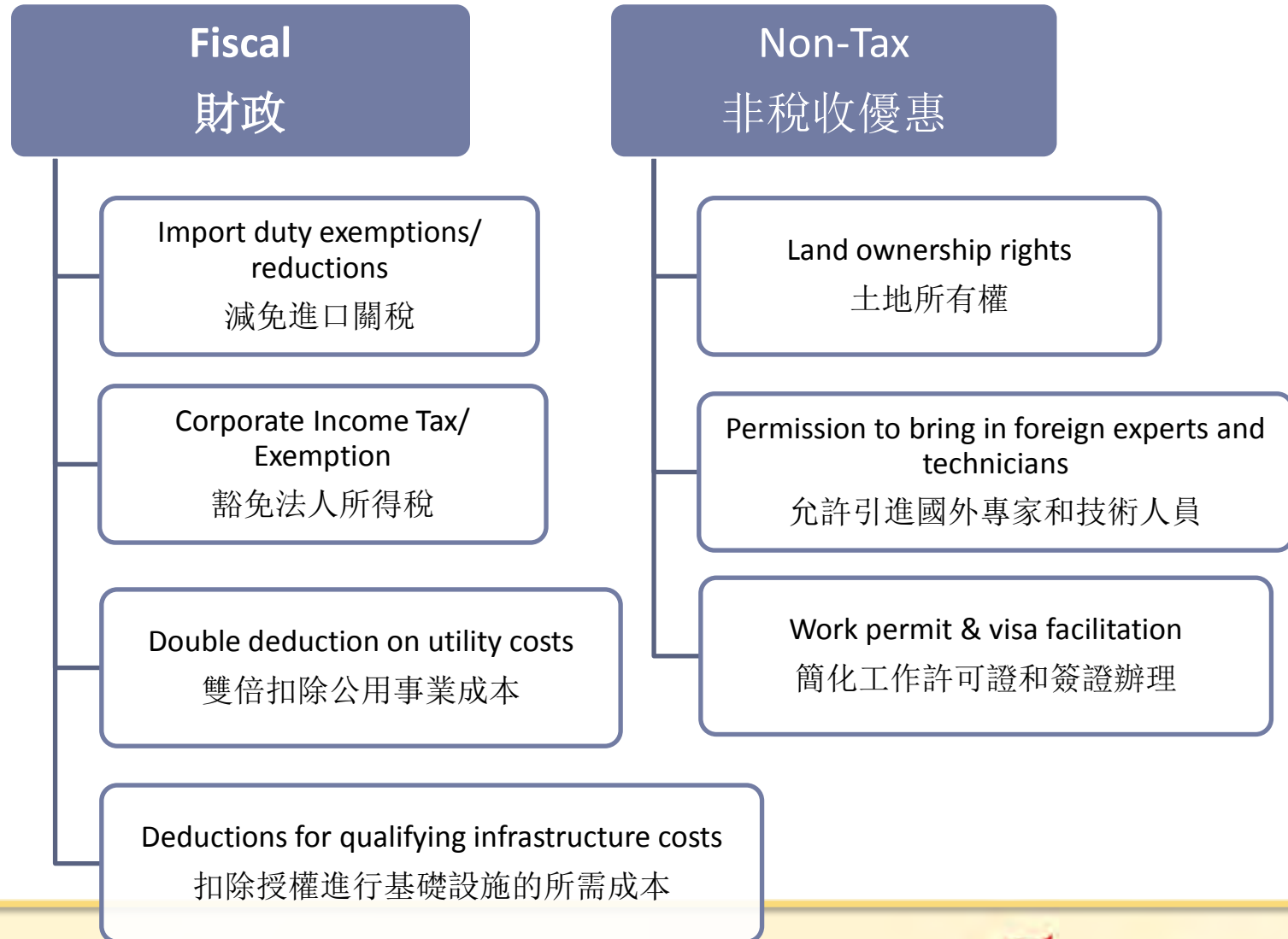
LIBERAL INVESTMENT POLICY

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

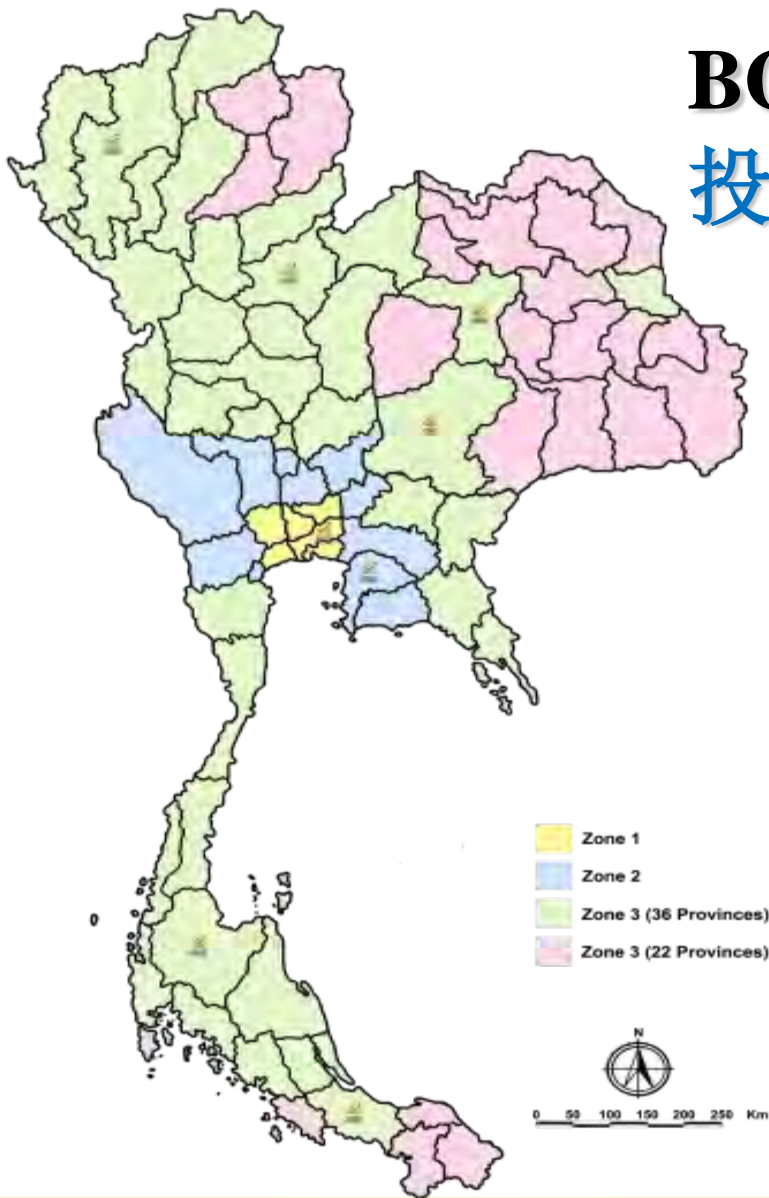
BOI's Investment Incentives

BOI總體投資優惠政策



BOI Zone-Based Incentives

投資委促進區域劃分



- **Zone 1:** Bangkok, Samut Prakan, Samut Sakhon, Nakhon Pathom, Nonhtaburi and Pathum Thani

區域1：曼谷、北欖、和龍仔厝、佛統、暖武里和巴吞他尼

- **Zone 2 :** Ang Thong, Ayutthaya, Chachoengsao, Chon Buri, Kanchanaburi, Nakhon Nayok, Phuket, Ratchaburi, Rayong, Samut Songkhram, Saraburi, and Suphanburi

區域2：和紅統、大城、北柳、春武里、北碧、昆西育、普吉、叻丕、羅勇、夜功、北標和素攀

- **Zone 3:** remaining 59 provinces

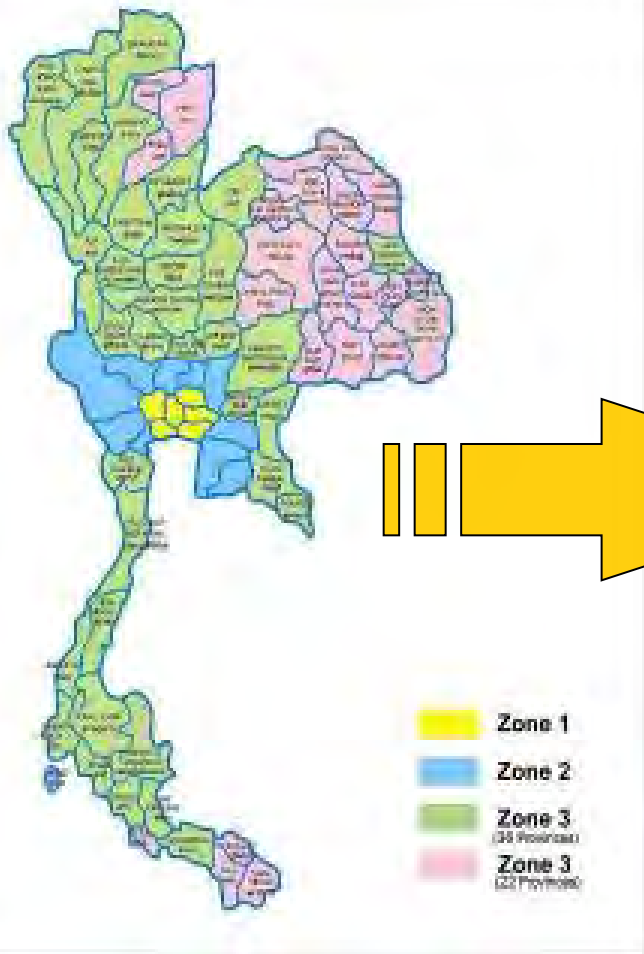
區域3：剩餘的59個府

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
免機械進口稅



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

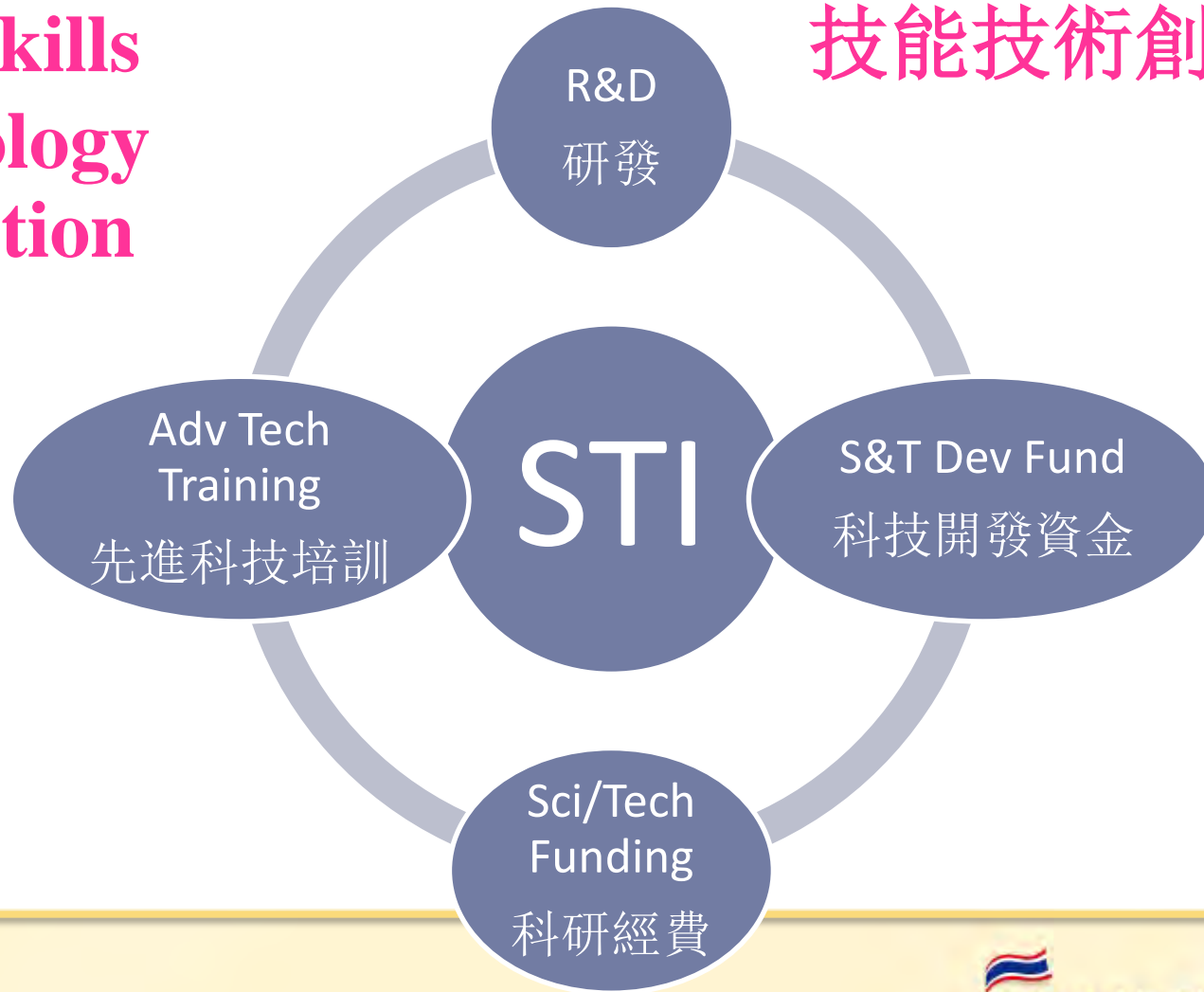
- Agriculture and agro-industries 農業和農工業
- R&D 研發行業
- Software development 軟件開發行業
- Molds & Dies 模具製造行業
- Biotechnology 生物科技行業
- Alternative energy 替代能源產業
- Manufacture of hi-tech products e.g. advanced ceramics 高科技製造業，如：精密陶瓷製造業
- Waste recycling & recovery 廢棄物回收利用行業

Additional Incentive Package for STI:

技能技術創新及其外附激勵項目

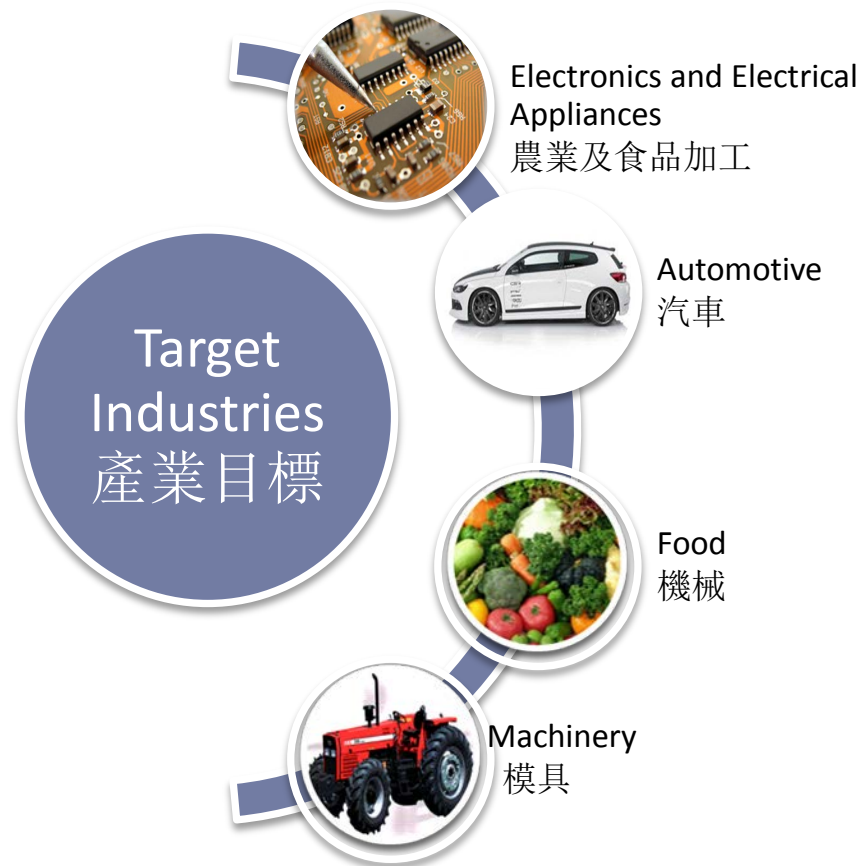
**Skills
Technology
Innovation**

技能技術創新



Target Industries for Taiwan Investors

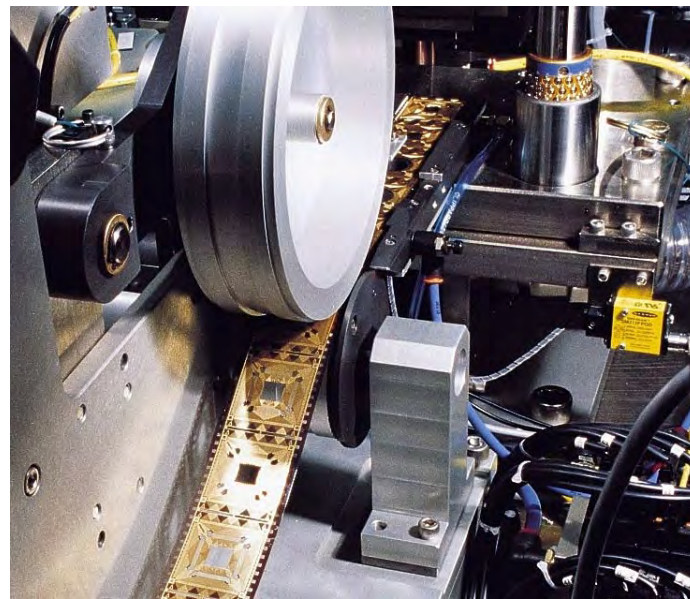
台灣投資者的目標行業



Electronics & Electrical Products

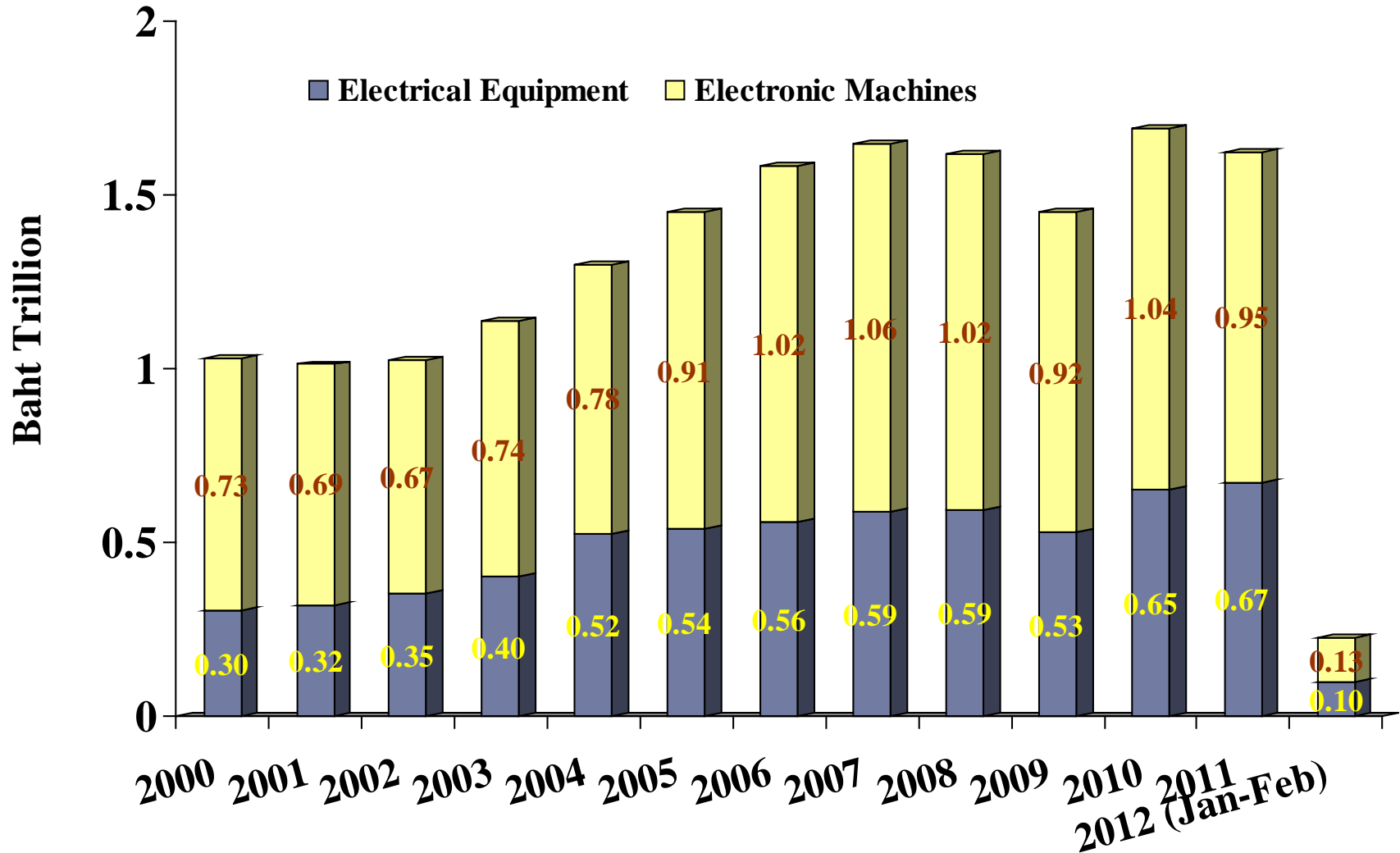
Integrating Innovation & Technology

集成電子電器產品更新與技術



E&E ACCOUNTS FOR 30% OF EXPORTS:

電子電器產品出口量佔總出口量的30%



TOP 15 COUNTRIES FOR GLOBAL ELECTRICAL &

ELECTRONICS INDUSTRY IN 2011 2011年在全球電子和電氣產業的15強國家

Rank 排名	Country 國家	Export Value (US\$ Million) 出口額 (百萬美元)
1	China 中國	669,618
2	Hong Kong 香港	244,259
3	United States 美國	218,501
4	Germany 德國	181,799
5	Japan 日本	170,165
6	Singapore 新加坡	152,631
7	South Korea 韓國	137,265
8	Netherlands 荷蘭	123,982
9	Taiwan 台灣	114,361
10	Mexico 墨西哥	93,879
11	Malaysia 馬來西亞	80,358
12	France 法國	55,753
13	Thailand 泰國	53,219
14	Italy 意大利	45,897
15	Czech Republic 捷克共和國	43,291

In 2011, Thailand is ranked # 13 for World's Exporting value in E&E market 在2011年，泰國在電子和電氣市場上出口額排名第13位

Source: Global Trade Atlas, April 2012



Electronics and Electrical Industry

電子和電氣產業

- E&E exports **US\$53.95 billion** in 2011, 23% of total exports
2011年電子和電氣出口值達**539.5億美元**，佔總出口值的23%。
- **Major products: HDD, IC, TV, A/C & other WG**
主要產品：硬盤驅動器，集成電路，電視，空調和其他波導管
- Thailand is the **world's largest producer** of HDDs
泰國是**世界上最大的硬盤驅動器生產國**
- A leading country in the manufacture of **integrated circuits and white goods**
是製造集成電路和大型家用電器的領先國家
- Strong supporting industries for electrical appliances
 - **Compressors, motors, plastic and metal parts**
強大的電氣製品輔助產業
壓縮機，電動機，塑料和金屬零配件



Thailand Automotive Industry

泰國汽車產業



THAILAND'S AUTOMOTIVE INDUSTRY OVERVIEW

泰國汽車產業總體概況

Thailand:

15th largest automobile producer in the world in 2011

泰國:

2011年世界最大汽車生產國排名第15位。

Target:

Top-10 by 2014, when local capacity projected at 2.43 million units

目標:

2014年挺進前10名，同時國內資產投資項目達到243萬項。

Output:

Combined production of 1,457,795 units in 2011 (50.46% for export)

輸出:

2011年間總生產1,457,795輛汽車。(50.46%用於出口)

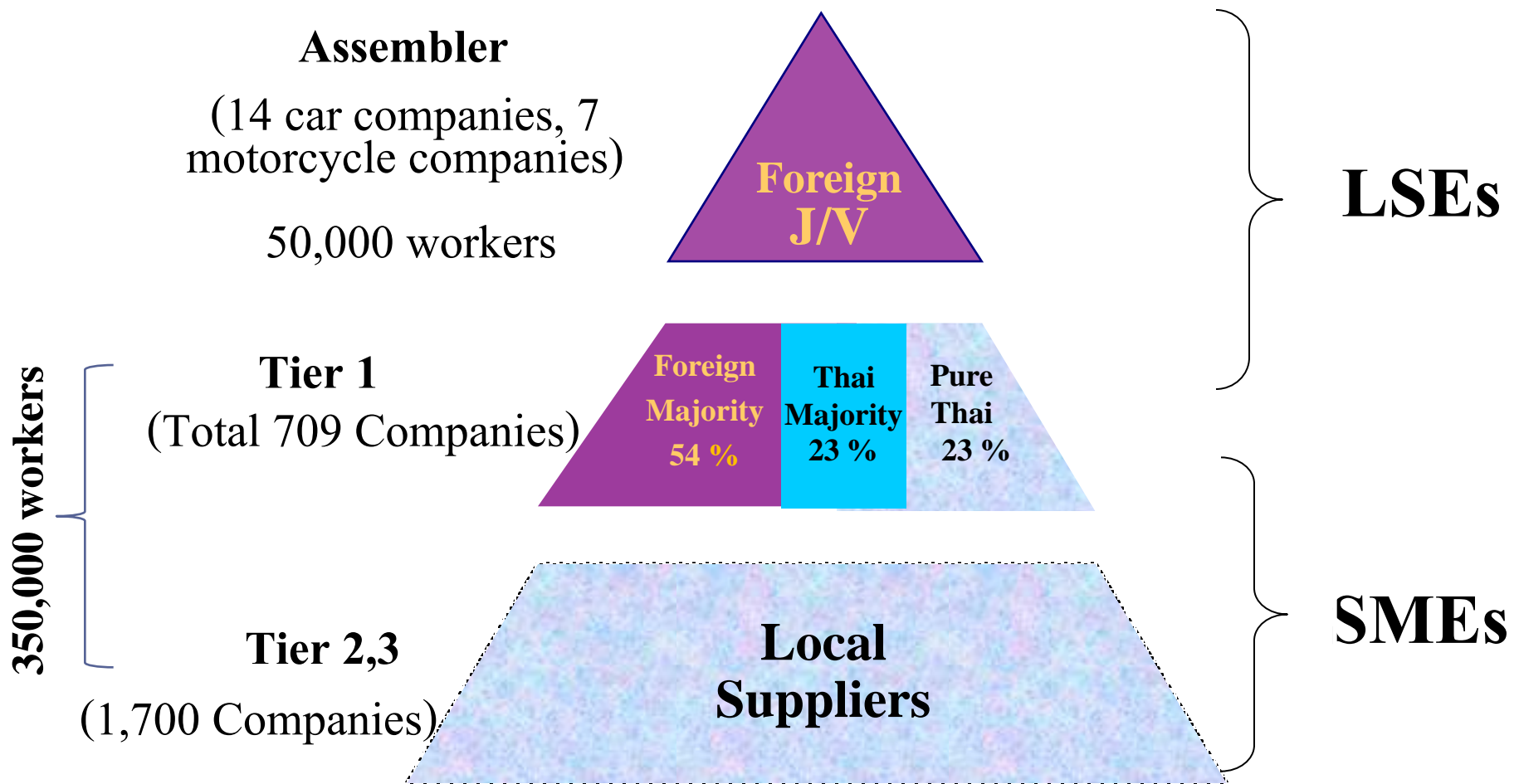
High local content :

80-90% for pick-up and 30-70% for passenger car

當地含量高: 80%-90%的輕型貨車, 30%-70%的客車。

Structure of Thai Automotive Industry

泰國汽車產業結構



[* LSEs : Large Scale Enterprises SMEs : Small & Medium Enterprises]

56 OF TOP 100 GLOBAL SUPPLIERS 2010 ACTIVE IN THAILAND

2010年,在泰國經商的56名全球100強供應商

Aisin Seiki
Akebono Brake
Alpine
American Axle
Asahi Glass
Autoliv
BASF
Bayer
BorgWarner
Bridgestone
CalsonicKansei
Continental
Dana
Delphi

Denso
Draexlmaier
Faurecia
Federal-Mogul
F-Tech
GKN Driveline
Goodyear
Grupo Antolin
Hayes Lammerz
Hitachi
Johnson Control
JTEKT
Koito
Lear

3M
Mahle
Michelin
Mitsuba
Mitsubishi
NHK Spring
NSK
NTN
Omron
Pioneer
Rieter Auto
Robert Bosch
Sanden
Showa

Stanley
Sumitomo
Takata
Teneco
TI Automotive
Tokai Rika
Toyota Gosei
Toyota Boshoku
TRW
TS Tech
Valeo
Visteon
Yazaki
ZF

OPPORTUNITIES: COMPONENTS NEEDED IN THAILAND

機遇：在泰國的部件需求

- ✓ Automatic Transmissions 自動變速裝置
- ✓ Continuously Variable Transmissions (CVT)
無級變速箱
- ✓ Traction motors for automobiles; e.g. Hybrid or fuel cell cars 汽車牽引電動機
- ✓ Regenerative Braking System
- ✓ 再生剎車系統
- ✓ Electronic Stability Control (ESC)
電子穩定控制
- ✓ Rubber tires for vehicles
車輛輪胎



THAILAND'S AGRO INDUSTRY 泰國農業



2011 THAILAND'S TOP FOOD EXPORT
CATEGORIES AND WORLD'S RANKING

2011年泰國主要出口食品種類和世界排名



World's # **6** Rice & Grains Exports
世界第6位:大米&谷粒出口



World's # **1** Cassava Exports
世界第1位:木薯出口



World's # **2** Sugar Exports
世界第2位:糖出口



World's # **3** Fishery Exports
世界第3位:漁業出口



World's Top **15** Fruit & Vegetable Exports
世界第15強 水果&蔬菜出口

THAILAND
12th in total
food exports
泰國食品總體
出口排名第12
位

FOOD SAFETY STANDARDS

食品安全標準



- Thai food factories must apply for GMP, ISO, HACCP, TQM, Water footprint and Carbon footprint. 泰國食品工廠必須申請GMP, ISO, HACCP, TQM, 水足跡和碳足跡
- For food exports, BRC , IFS, and SQF must be applied. 針對食品出口，須申請BRC, IFS和SQF
- Agricultural Commodity and Food Standards (ACFS)
農產品和食品標準 (ACFS)
 - Good Manufacturing Practice(GMP) 良好生產規範
 - Good Hygienic Practice (GHP) 良好衛生規範
 - ISO 22000 (Safety on Food Supply Chain) IOS22000 (安全食品供應)

*BRC (British Retail Consortium) *IFS (International Food Standard) SQF* (Safety Quality Food)



Machinery

機械

Economic transition from labor intensive to knowledge-based is creating great demand

經濟過渡從勞動密集型到知識型，并創造巨大需求。

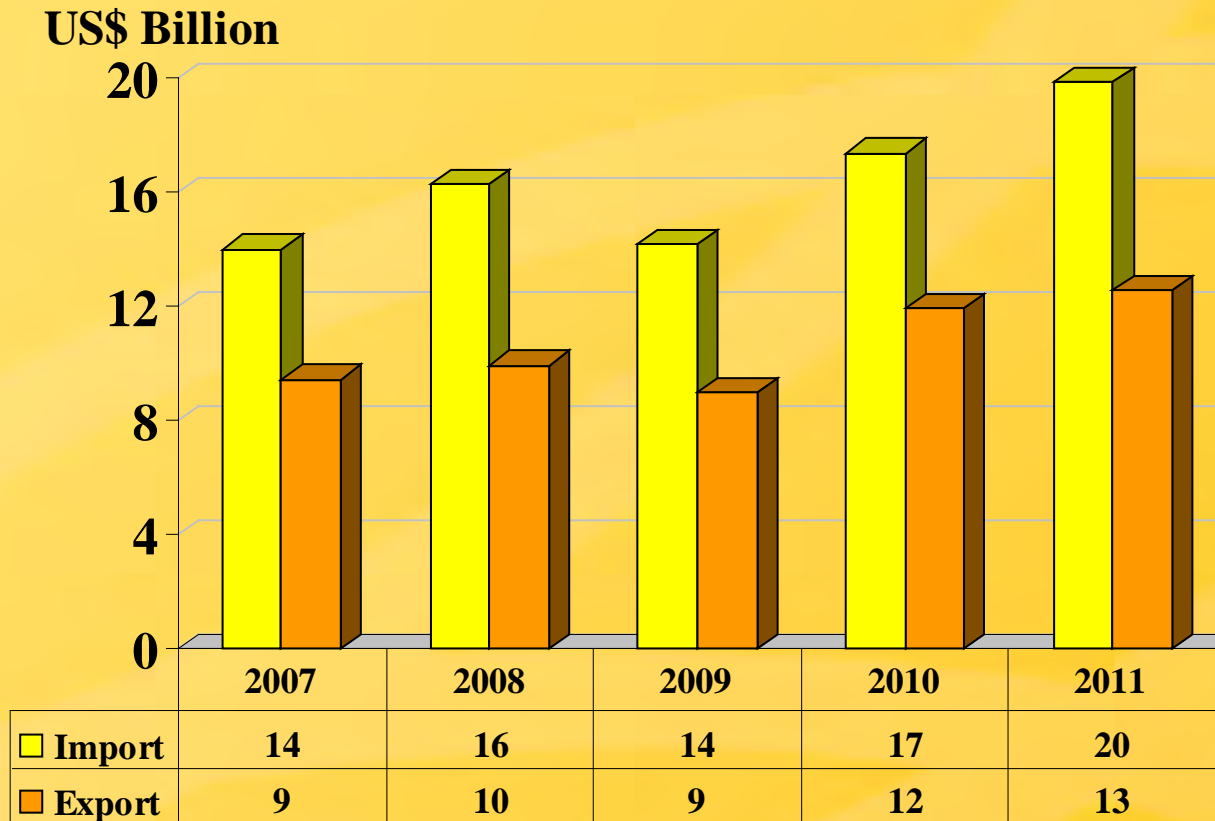


Unbeatable Thailand,
Unparalleled Opportunities



MACHINERY AND PARTS: IMPORTS AND EXPORTS, 2007 – 2011

2007年 - 2011年泰國工業機械及其零配件進出口概況

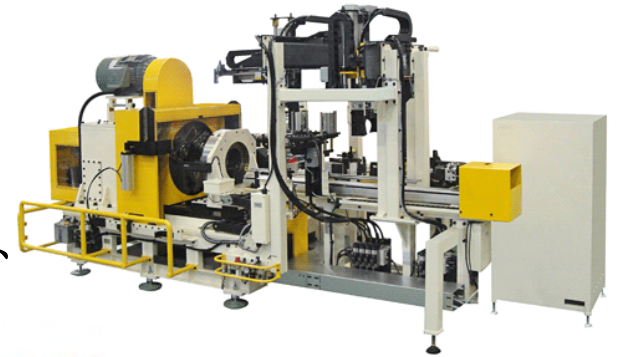


OPPORTUNITIES IN MACHINERY

機械行業的機遇

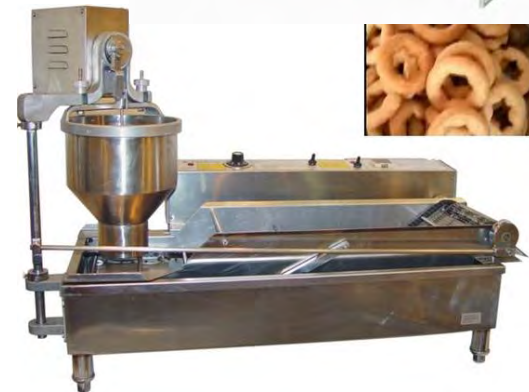
- Thailand continues to industrialize, but is dependent on foreign industrial machinery for immediate future.

泰國持續實現工業化，但關鍵還是依靠未來外國機械工業的發展。



- High demand for: 高需求:

- Food and farm machinery
食品 and 農業機械
- Alternative energy/energy conservation machinery
替代能源/節能機械
- Textile machinery 紡織機械
- Automotive machinery 汽車機械
- Mould & Die Industry 模具和鋼模機械



SPECIFIC INDUSTRIAL MACHINERY NEEDED: 特殊工業機械需求

- Turning machines 車床
- Drilling machines 轉機
- Milling machines 铣床
- Grinding machines 研磨機
- Machine Centers 機械中心
- Gear Cutting & Finishing Machines
切齒&加工機械
- Die Sinking EDMs
模具電侵切割機
- Wire Cut EDMs 火花機
- Laser Beam Machines
激光機器
- Plasma Arc Cutting Machines
等離子弧切割機械
- Electron Beam Machines
電子束機
- Broaching Machines 絞孔機

**BOI Priority Activities-8 years
corporate income tax holidays,
duty free machinery**

**投資委優先產業-獲免8年企業
所得稅 免機械進口稅**

Unbeatable Thailand 無與倫比的泰國 Unparalleled Opportunities 無限可能的商機

Thailand as a hub of ASEAN 地理位置上，
泰國在東協國家中起紐帶的作用

Strong supply chain 強大的供應鏈

Liberal investment policy and financial
policy

自由的投資政策及寬鬆的金融政策

Several major infrastructure investment
projects 主要的基礎設施項目

Cultural rich and friendly environment
多樣化文化及友善的泰國人

BOI Services

投資委服務

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務組)

ASEAN Supporting Industry Database
東協補助產業數據庫

Interaction with other govt. agencies
on behalf of investors
協助投資者建立與其它政府部門的關係

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

Overseas offices 海外辦事處

One Start One Stop Investment Center



More Convenience, 更方便
less time, 更省時
more efficiency! 更有效率



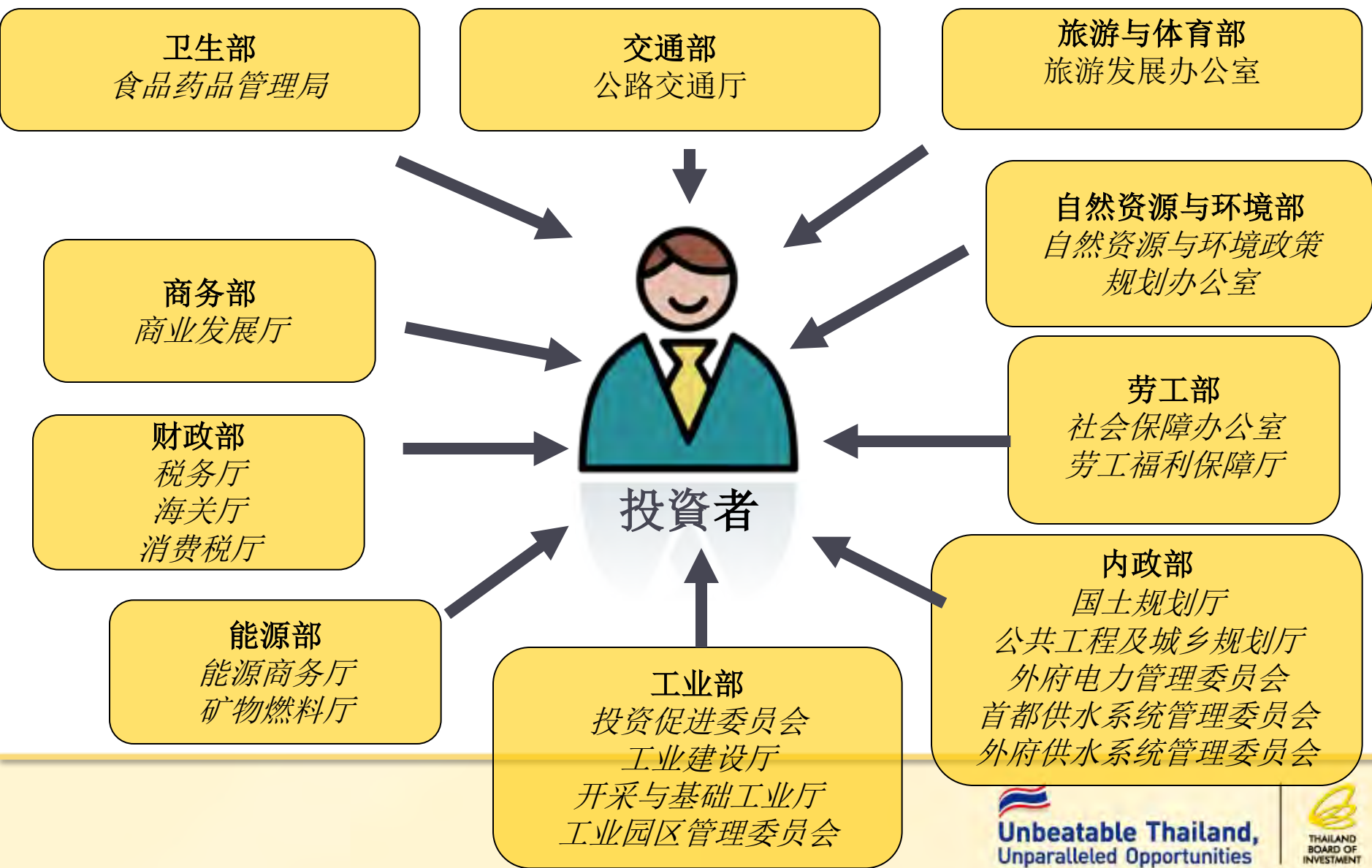
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Email: osos@boi.go.th

一站式服务中心常驻机构



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Orapin Swadpanich
主任



**Unbeatable
Thailand,
Unparalleled
Opportunities**

THANK YOU 謝謝!