

# [ futuris in thailand ]

BOI Seminar May 2012

David Chuter, Executive Strategy & Communications



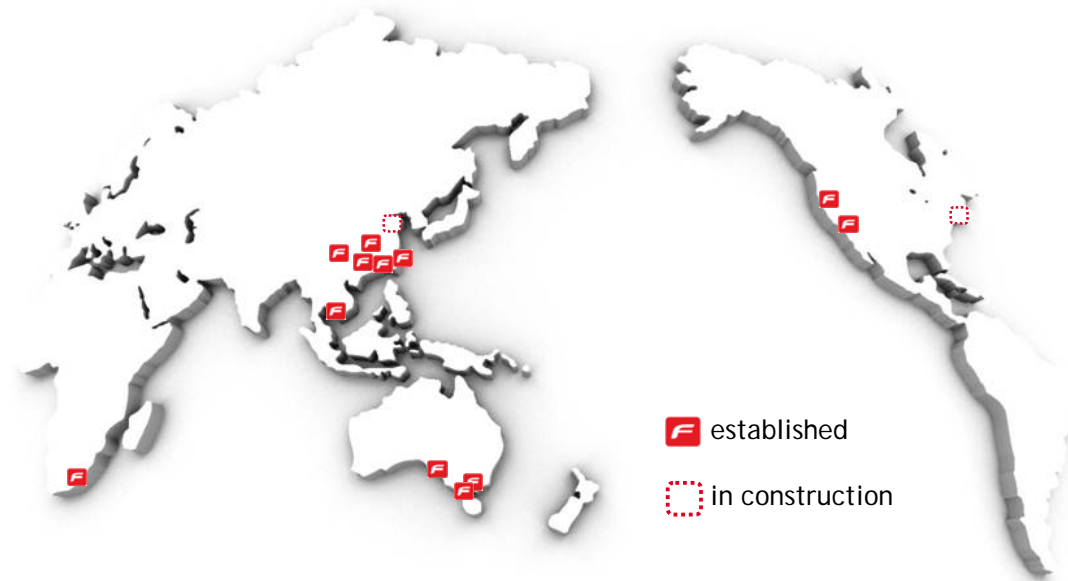
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## who are futuris?

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futuris - our vision

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➤ through flexibility, agility and partnership models, we will be a leading global innovator of quality design and manufacturing solutions



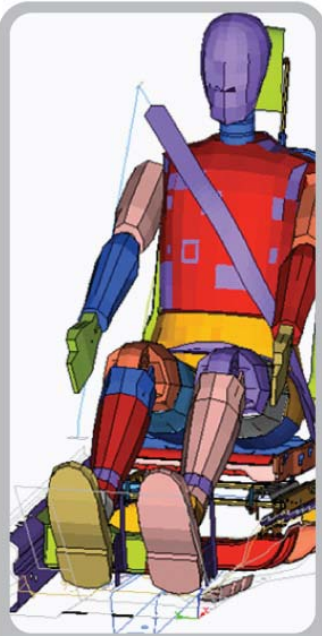


# futuris - total solution design & development

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**BENCHMARKING  
CONCEPT DESIGN  
& STYLING  
ALIAS**



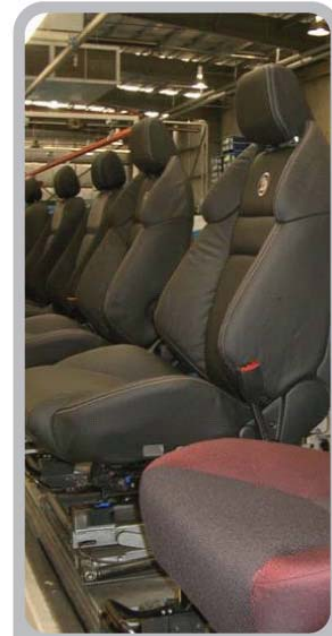
**VIRTUAL DESIGN  
& ENGINEERING  
CAE/FEA/SEA**



**TRIM & TEXTILE  
DEVELOPMENT  
& PROTOTYPES**



**PHYSICAL TESTING  
& VALIDATION  
MATERIAL TESTING  
ACOUSTIC TESTING**



**FINAL ASSEMBLY  
PRODUCT  
APPROVAL**

# futuris - 2012 major launches



↗ Interior trim



↗ Interior trim



↗ Seating



↗ Seating



↗ Seating



↗ Tram interiors



↗ Seating

# so how do we approach new markets?

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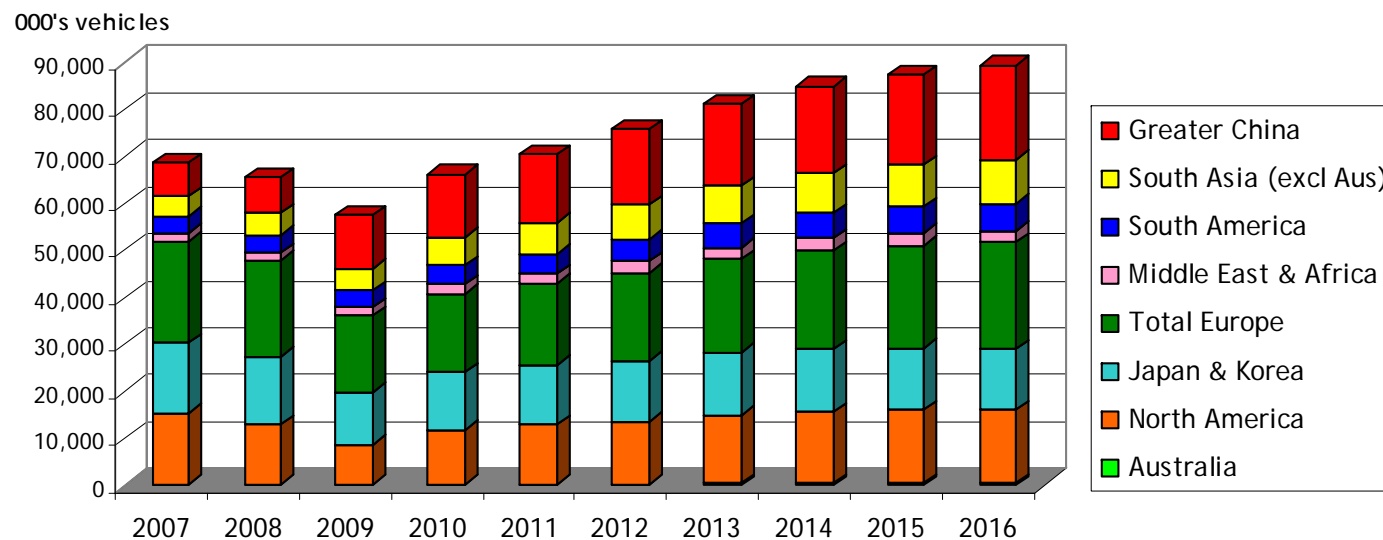
Strategic purpose	Our Vision		Our Strategy	
Environment	Global Market Review	Asia Pacific Market Review	Thai Market Review	
Market assessment	Economy & Environment	Tier 1 Competition	Local Suppliers	Lessons Learned
Target opportunities	Targeted Research			
Growth opportunities	M & A Opportunities	Tier 1 Supplier	Tier 2 Supplier	
Risk management	Due Diligence	IP Protection	Legal & HR Partnerships	Detailed Planning
Implementation plan	JV / WOFE	Local Resources	Quotation & proposals	Supplier / tool resource

**it's about finding the right win-win opportunities and relationships**



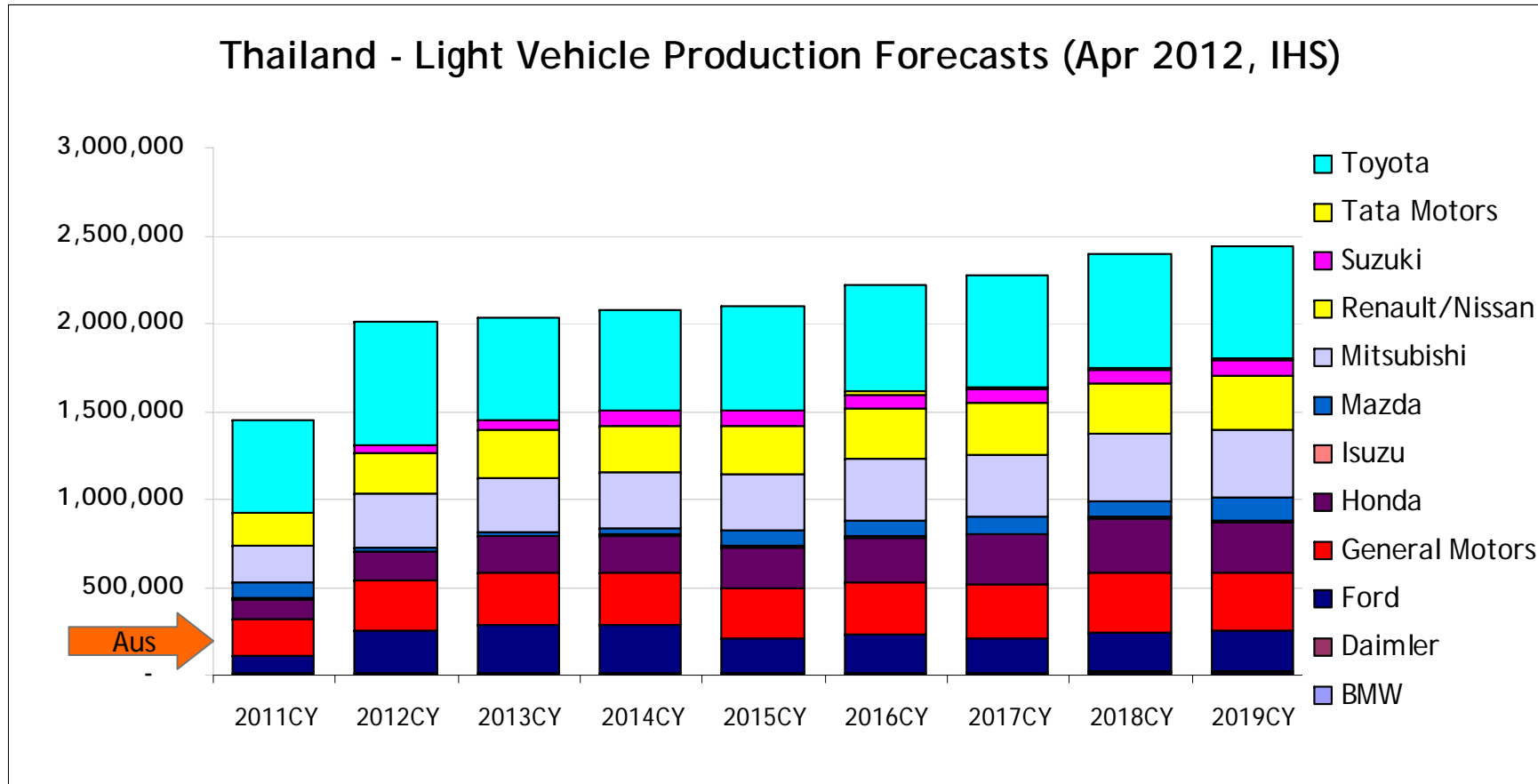
# why china and asia?

CSM Light Vehicle Production Forecast - May 2010



CSM Light Vehicle Production data May 2010	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	growth 2007-2016	growth 2009-2016
Australia	327	280	213	243	282	309	396	405	413	421	29%	98%
North America	15,101	12,637	8,576	11,582	12,670	13,352	14,439	15,202	15,552	15,598	3%	82%
Japan & Korea	14,778	14,401	10,916	12,170	12,597	12,959	13,395	13,256	13,116	12,873	-13%	18%
Total Europe	21,713	20,490	16,299	16,890	17,365	18,669	19,950	21,077	22,025	22,703	5%	39%
Middle East & Africa	1,734	1,718	1,782	1,892	2,077	2,294	2,426	2,600	2,621	2,658	53%	49%
South America	3,567	3,738	3,666	3,995	4,215	4,652	5,066	5,357	5,568	5,750	61%	57%
South Asia (excl Aus)	4,195	4,701	4,704	6,047	6,635	7,457	7,997	8,504	8,860	9,240	120%	96%
Greater China	7,202	7,492	11,342	13,348	14,504	16,134	17,492	18,480	19,227	20,118	179%	77%
<b>SUM</b>	<b>68,617</b>	<b>65,457</b>	<b>57,498</b>	<b>66,167</b>	<b>70,345</b>	<b>75,826</b>	<b>81,161</b>	<b>84,881</b>	<b>87,382</b>	<b>89,361</b>	<b>30%</b>	<b>55%</b>

# why thailand?



# investing in thailand



The World Class Developer in Thailand

# automotive cluster in hemaraj industrial estates

- 1 MANUFACTURING AND ASSEMBLY PLANT**
  - AutoAlliance [Thailand] Co., Ltd. (Ford & Mazda)
  - Ford Motor Company [Thailand] Ltd.
  - General Motors [Thailand] Co., Ltd.
  - Starutama (Motorcycle)
  - SUZUKI** Suzuki Automobile Manufacturing [Thailand] Co., Ltd.
- 2 SUSPENSION**
  - Off Road Accessories Ltd.
  - Somboon Somic Manufacturing Co., Ltd.
  - Takao Eastern Co., Ltd.
  - THK Rhythm [Thailand] Co., Ltd.
  - Tokai Eastern Rubber [Thailand] Ltd.
  - TRW Steering & Suspension Co., Ltd.
  - YORZU Yorozu [Thailand] Co., Ltd.
- 3 AIR CONDITIONER**
  - Air International Thermal Systems [Thailand] Ltd.
  - EngineTech [Thailand] Co., Ltd.
  - Haita Climate Control [Thailand] Co., Ltd.
  - KDAC [Thailand] Co., Ltd.
  - Mineru [Thailand] Co., Ltd.
  - Valeo Clutch [Thailand] Co., Ltd.
  - Valeo Compressor [Thailand] Co., Ltd.
- 4 ENGINE/TRANSMISSION PART**
  - Gates Unitta [Thailand] Co., Ltd.
  - Hanil Forging [Thailand] Co., Ltd.
  - Kanemitsu Pulley Co., Ltd.
  - Kitagawa [Thailand] Co., Ltd.
  - Mizuki [Thailand] Co., Ltd.
  - M&T Allied Technologies Co., Ltd.
  - Parker Hannifin [Thailand] Co., Ltd.
  - Seimitsu Thai Co., Ltd.
  - Stars Technologies Industrial Ltd.
  - STB Textile Industry Co., Ltd.
  - Sunlit [Thailand] Co., Ltd.
  - Tokai Eastern Rubber [Thailand] Ltd.
  - Toyota Boshoku Filtration System [Thailand] Co., Ltd.
  - Yanagawa Techno Forge [Thailand] Co., Ltd.
- 5 COOLING SYSTEM PARTS**
  - CNK Manufacturing [Thailand] Co., Ltd.
  - Haita Climate Controls [Thailand] Co., Ltd.
  - KDAC [Thailand] Co., Ltd.
  - Siam Chuyo Co., Ltd.
  - Unity Industrial Co., Ltd.
- 6 ELECTRICAL SYSTEM PART**
  - Siam CM Electronics (Clarion)
  - Siam Furukawa Co., Ltd. (FB Battery)
  - Thai Summit Mitsubishi Electric Manufacturing Co., Ltd.
  - Visteon [Thailand] Ltd.
  - Yuanda [Thailand] Co., Ltd.
- 7 BUMPER PARTS**
  - DaikyoNishikawa [Thailand] Co., Ltd.
  - Hicom Automotive Plastics [Thailand] Ltd.
  - Off Road Accessories Ltd.
  - Unity Industrial Co., Ltd.
- 8 HEAD LIGHTS PART**
  - T.I.T International Co., Ltd.

- 9 PRECISION PARTS**
  - Aoyama Thai Co., Ltd.
  - CNK Manufacturing [Thailand] Co., Ltd.
  - Fuserashi [Thailand] Co., Ltd.
  - Inergy Automotive Systems [Thailand] Ltd.
  - Koide [Thailand] Co., Ltd.
  - Miyasaka Component [Thailand] Co., Ltd.
  - Nissan Spring [Thailand] Co., Ltd.
  - NRB Bearings Ltd.
  - NTN Manufacturing [Thailand] Co., Ltd.
  - Piolax [Thailand] Ltd.
  - Sekisui S-Lec [Thailand] Co., Ltd.
  - Siam Chuyo Co., Ltd.
  - Suruga [Thailand] Co., Ltd.
  - Thai Asakawa Co., Ltd.
  - Thai Okawa Co., Ltd.
  - Thai Summit Harness Public Co., Ltd.
  - Togo Seisakusy [Thailand] Co., Ltd.
- 10 RUBBER PARTS**
  - Maruyasu Industries [Thailand] Co., Ltd.
  - Miyasaka Component [Thailand] Co., Ltd.
  - Ryoko Trading [Thailand] Co., Ltd.
  - Yokohama Rubber [Thailand] Co., Ltd.

- 13 BODY PARTS**
  - Asno Horie [Thailand] Co., Ltd.
  - Etec [Thailand] Co., Ltd.
  - Hicom Automotive Plastics [Thailand] Ltd.
  - Kansai Resin [Thailand] Co., Ltd.
  - Sanko Gosei Technology [Thailand] Ltd.
  - Summit Laemchabang Auto Body Work Co., Ltd.
  - Thai Kansai Paint Co., Ltd.
  - Thai Summit Autoparts Industry Co., Ltd.
  - Thai Summit Eastern Seaboard Autoparts Industry Co., Ltd.
  - Toyota Boshoku Filtration System [Thailand] Co., Ltd.
  - Unity Industrial Co., Ltd.

- 16 DOOR PARTS**
  - Auto Interior Products Co., Ltd.
  - Daikyo Nishikawa [Thailand] Co., Ltd.
  - Faurecia Interior Systems [Thailand] Co., Ltd.
  - Ingress Autoventures Co., Ltd.
  - Matsui Eastern [Thailand] Co., Ltd.
  - Narumi [Thailand] Co., Ltd.
  - Unity Industrial Co., Ltd.
  - U-Shin [Thailand] Co., Ltd.

- 20 DRIVESHAFTS/CHASSIS PARTS**
  - American Axle & Manufacturing [Thailand] Co., Ltd.
  - Dana Spicer [Thailand] Ltd.
  - GKN Driveline [Thailand] Co., Ltd.
  - GKN Driveline JTEKT Manufacturing Ltd.
  - Hanil Forging [Thailand] Co., Ltd.
  - KDAC [Thailand] Co., Ltd.
  - Mizuki [Thailand] Co., Ltd.
  - Somboon Advance Technology (PLC)
  - Thai Kohwa Precision Co., Ltd.
  - Thai Summit PK Corporation Co., Ltd.
  - ZF Lemforder [Thailand] Co., Ltd.
- 21 SEATING AND CARPETING PARTS**
  - Aquaflit Asia & Pacific Co., Ltd.
  - Aunde [Thailand] Co., Ltd.
  - General Seating [Thailand] Ltd.
  - Johnsun Control & Summit Interior Co., Ltd.
  - FUTURIS Futuris Automotive [Thailand] Co., Ltd.**
  - Yokohama Ryoko [Thailand] Co., Ltd.

- 22 TIRE PARTS**
  - BARBE [Thailand] Ltd.
  - Bridgestone Metalpha [Thailand] Co., Ltd.
  - Maxxis International [Thailand] Co., Ltd.
  - Michelin Siam Co., Ltd.
  - SwitzMcLAREN Industries [Thailand] Co., Ltd.
  - TTAT TT Assembly East Co., Ltd.
  - Lion Tyres [Thailand] Co., Ltd.
  - Vuteq Thai Co., Ltd.

- 23 AUTOMOTIVE LOGISTICS**
  - Autoconsol [Thailand] Co., Ltd.
  - Autrans [Thailand] Co., Ltd.
  - Katoen Natie [Thailand] Co., Ltd.
  - Kerry Logistics
  - Logistic Alliance [Thailand] Co., Ltd.
  - Misumi [Thailand] Co., Ltd.
  - Sankyu Laem Chabang [Thailand] Co., Ltd.
  - Thai VMI Service Co., Ltd.

- 17 WHEEL PARTS**
  - Li Tai Alloy Co., Ltd.
  - Sekisui S-Lec [Thailand] Co., Ltd.
  - Siam Metal Technology Co., Ltd.
  - Thai Summit Meiji Forging Co., Ltd.
  - TTAT TT Assembly East Co., Ltd.

- 18 FUEL SYSTEM PARTS**
  - Asno Horie [Thailand] Co., Ltd.
  - Chalybs Cylinders Ltd.
  - Inergy Automotive Systems [Thailand] Ltd.
  - Kobatech [Thailand] Co., Ltd.
  - Komatsu Seiki [Thailand] Co., Ltd.
  - Maruyasu Industries [Thailand] Co., Ltd.
  - NT Seimitsu [Thailand] Co., Ltd.
  - NTN Manufacturing [Thailand] Co., Ltd.
  - Toyota Boshoku Filtration System [Thailand] Co., Ltd.
  - Natural Gas Cylinder [Thailand] Co., Ltd.

- 19 EXHAUST SYSTEM PART**
  - BASF Chemcat [Thailand] Ltd.
  - Cataler [Thailand] Co., Ltd.
  - Dongwon Thailand Co., Ltd.
  - Faurecia Emissions Control Technologies [Thailand] Co., Ltd.
  - Tokai Eastern Rubber [Thailand] Ltd.

- 14 STEERING PARTS**
  - Johnson Controls & Summit Interiors Ltd.
  - KDAC [Thailand] Co., Ltd.
  - NTN Manufacturing [Thailand] Co., Ltd.
  - Somboon Somic Manufacturing Co., Ltd.
  - Summit FujiKiko Kurata Manufacturing Co., Ltd.
  - THK Rhythm [Thailand] Co., Ltd.
  - Tokai Eastern Rubber [Thailand] Ltd.
  - TRW Steering & Suspension Co., Ltd.
  - Yamasei [Thailand] Co., Ltd.

- 15 WINDSHIELD/SIDE MIRROR PARTS**
  - Bolwell Holdings [Thailand] Co., Ltd.
  - Brose Delloyd Automotive Co., Ltd.
  - EngineTech [Thailand] Co., Ltd.
  - Guardian Industries Group Ltd.
  - Hori Glass Thailand Co., Ltd.
  - Itakura [Thailand] Co., Ltd.
  - M&T Allied Technologies
  - Saint-Gobain Sekurit
  - SMR Automotive System [Thailand] Ltd.



October 2011



## what made thailand possible for futuris?

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# how did we get started?

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welcome to futuris thailand

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# new building underway march 2011

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# official opening ceremony

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# spiritual blessing ceremony

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## embracing local culture and practices

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# maintain standards - safety first above all else

<p><b>ห้าม NEVER</b></p> <p>ใช้อุปกรณ์ผิดวิธีหรือทำการดัดแปลง อุปกรณ์ความปลอดภัย abuse, or tamper with, safety equipment</p>	<p><b>สิ่งที่ต้องปฏิบัติเสมอ ALWAYS</b></p> <p>ปฏิบัติตามคำสั่งปฏิบัติงาน ขั้นตอนการปิดเครื่องจักร ใบอนุญาตทำงาน กฎเกี่ยวกับอุปกรณ์เคลื่อนที่และป้ายเตือน เพื่อความปลอดภัย follow work instructions, lock out procedures, permits to work, mobile equipment rules and safety signs</p>
<p><b>ห้าม NEVER</b></p> <p>มาทำงานโดยมีอาการมึนเมาจากสิ่งเสพติดหรือแอลกอฮอล์ come to work under the influence of drugs or alcohol</p>	<p><b>สิ่งที่ต้องปฏิบัติเสมอ ALWAYS</b></p> <p>รายงานอันตรายที่อาจก่อให้เกิดการบาดเจ็บแก่ผู้อื่น report a hazard that may cause injury to another person</p>
<p><b>ห้าม NEVER</b></p> <p>จงใจกระทำการใด ๆ ที่ทำให้ตนเองหรือผู้อื่นมีความเสี่ยงต่ออันตราย deliberately place yourself or others at risk of harm</p>	<p><b>สิ่งที่ต้องปฏิบัติเสมอ ALWAYS</b></p> <p>รายงานอุบัติเหตุและ "เหตุการณ์เกือบเกิดอุบัติเหตุ" ต่อผู้จัดการของท่านทันที เพื่อให้มีการสืบสวนและยกระดับมาตรฐานป้องกันที่เหมาะสม report incidents and 'near misses' promptly to your manager to allow appropriate investigation and escalation</p>
<p>“ กรุณาสอบถามผู้จัดการของท่านทันทีหากท่านไม่เข้าใจกฎข้อบังคับเหล่านี้ การไม่ปฏิบัติตามกฎข้อบังคับเหล่านี้จะมีผลให้เกิดการเตือนอย่างเป็นทางการหรือการปลดออกจากงาน</p> <p>PLEASE TALK TO YOUR MANAGER IMMEDIATELY IF YOU DO NOT UNDERSTAND THESE MANDATORY RULES. FAILURE TO FOLLOW THESE RULES WILL RESULT IN AN OFFICIAL WARNING OR DISMISSAL “</p> <p>rev1.0</p>	<p><b>สิ่งที่ต้องปฏิบัติเสมอ ALWAYS</b></p> <p>สวมอุปกรณ์ป้องกันอันตรายส่วนบุคคลที่กำหนดให้เหมาะสมกับสถานที่ พื้นที่ปฏิบัติงาน และลักษณะงานที่ปฏิบัติ wear the compulsory personal protective equipment for the site, work area and the work being performed</p> <p><b>สิ่งที่ต้องปฏิบัติเสมอ ALWAYS</b></p> <p>สวมชุดทำงานและรองเท้าที่เหมาะสมกับงานที่กำลังปฏิบัติ wear appropriate work clothes and footwear for the work you are doing</p>



กฎทอง เพื่อความปลอดภัย  
 เราทุกคนมีความรับผิดชอบร่วมกัน เพื่อให้มั่นใจได้ว่าเรามีสภาพแวดล้อมการทำงานที่ปลอดภัย สะอาดและเป็นธรรม

**[ GOLDEN SAFETY RULES ]**  
 WE ARE ALL RESPONSIBLE FOR ENSURING WE PROVIDE A SAFE, CLEAN AND FAIR WORKING ENVIRONMENT



# build a strong culture (and have fun!)

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# seat assembly

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# seat frames

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## cut and sew seat trim

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# interior and acoustic trim

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# partnerships or on your own?

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keep building your network

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# thailand is attractive for expats

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# japanese influence is strong in thailand

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## other thailand considerations

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## some final thoughts on entering thailand

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the futur[is] **now**

[www.futurisautomotive.com](http://www.futurisautomotive.com)

the futur[is] now



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