

Thailand's Economic Situation and Investment Environment

泰国的经济状况与投资环境

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Outline 概述

- Thailand's Fast Facts
泰国概况
 - Economic Situation
经济状况
 - Recent Investment Trend
最近投资趋势
 - Investment Environment and Opportunities
投资环境和投资
-

Thailand's Fast Facts 泰国概况 (1/2)



Area: 513,000 square km equivalent to China's Sichuan province

面积: 约51.3万平方公里
相当于中国四川省的土地面积

3

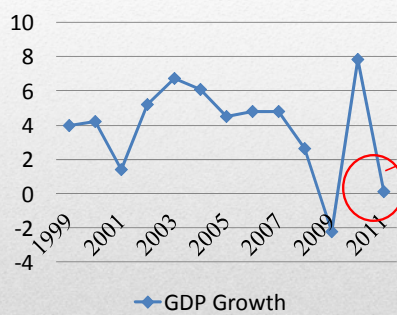
Thailand's Fast Facts 泰国概况 (2/2)

Population 泰国人口	67 million (2011) 6700万
GDP 国内生产总值 人均GDP	US\$345.6 billion (2011) US\$ 5,112 per capita GDP
GDP by sector 三大产业在GDP中的比重	Agriculture 农业: 8.6% (2011 est.)
	Industry 工业: 39% (2011 est.)
	Services 服务业: 25% (2011 est.)
Labor force 泰国劳动力	39 million 3900万 (2010)
Exports 泰国出口	US\$ 225.4 billion (2011) 2,254亿美元
Imports 泰国进口	US\$ 201.9 billion (2011) 2,019亿美元

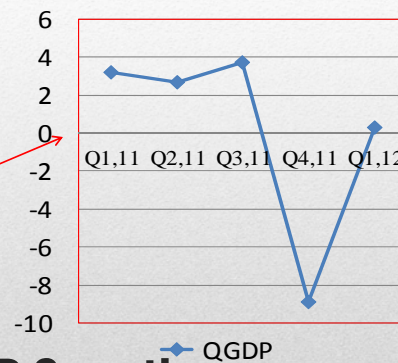
Source: Bank of Thailand, Ministry of Commerce

Economic Situation 经济状况

GDP growth from 1999 – 2011
1999-2011年国内生产总值增长



QGD 2011 – Q1, 2012
2011-2012年第一季度季度国内生产总值



Overall Thailand GDP Growth 泰国国内生产总值整体增长

Adapted from NESDB (Feb 2012) and Index Mundi (2012)

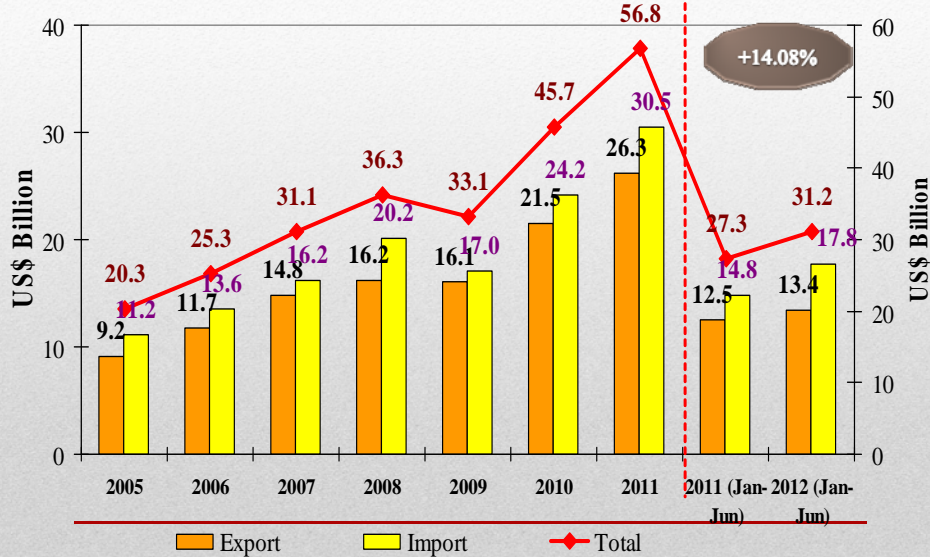
Economic Projections 2011-2013 2011-2013 经济预测

Economic Projections 经济预测	2011	2012	2013
1) GDP growth (percent y-o-y) GDP 增速(与上年同比增长的百分比)	0.1	5.7	5.0
2) Export, FOB value (percent y-o-y) 出口, 离岸值 (与上年同比增长的百分比)	16.4	7.0	10.8
3) Import, CIF value (percent y-o-y) 进口, 到岸值 (与上年同比增长的百分比)	24.7	14.0	10.1
4) MPI (2000=100) 制造业生产指数	172.56	176.88 (Jan-Jun)	NA
5) Core Inflation 核心通胀率	2.4	2.2	1.9
6) Headline Inflation 通货膨胀率	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

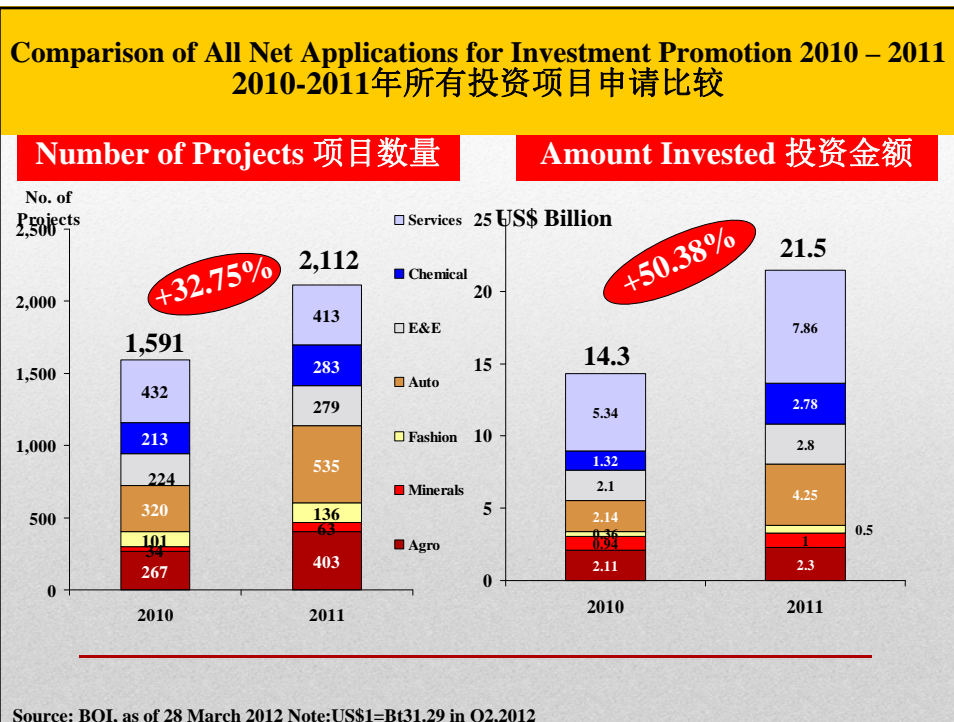
Trade Summary Thailand/China

泰国与中国之间贸易概况



Source: MOC, as of July 30, 2012

Recent Investment Trend 近期投资趋势

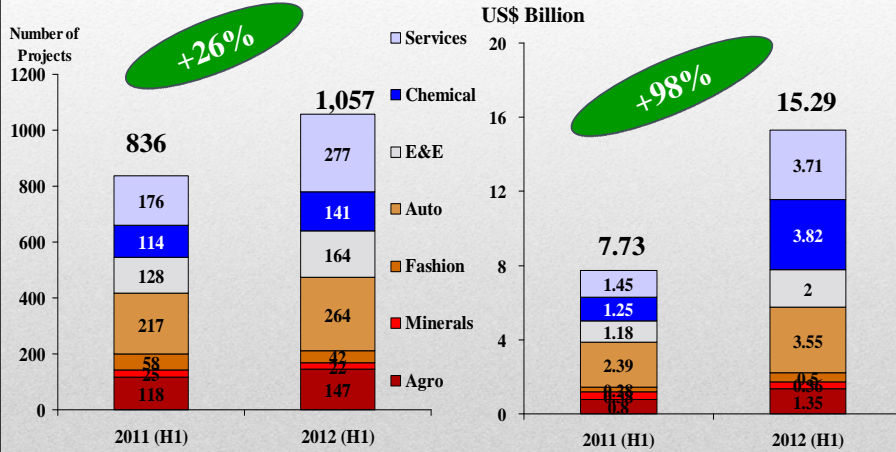


Comparison of All Net Applications for Investment Promotion Jan-Jun 2011 vs Jan – Jun 2012

2011年1-6月与2012年同期所有投资项目申请比较

Number of Projects 项目数量

Amount Invested 投资金额



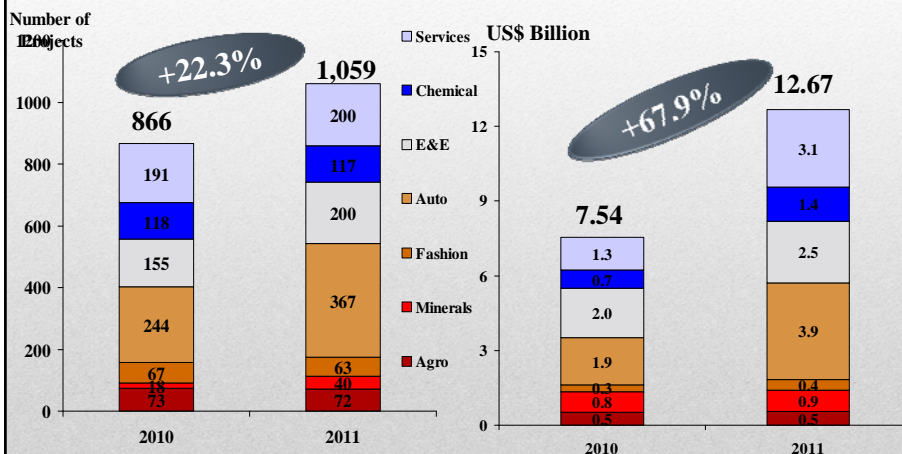
Source: BOI, as of 12 July 2012 Note:US\$1=Bt31.29 in Q2,2012

Comparison of Net Foreign Applications for Investment 2010 vs 2011

2010-2011年外商投资项目申请比较

Number of Projects 项目数量

Amount Invested 投资金额



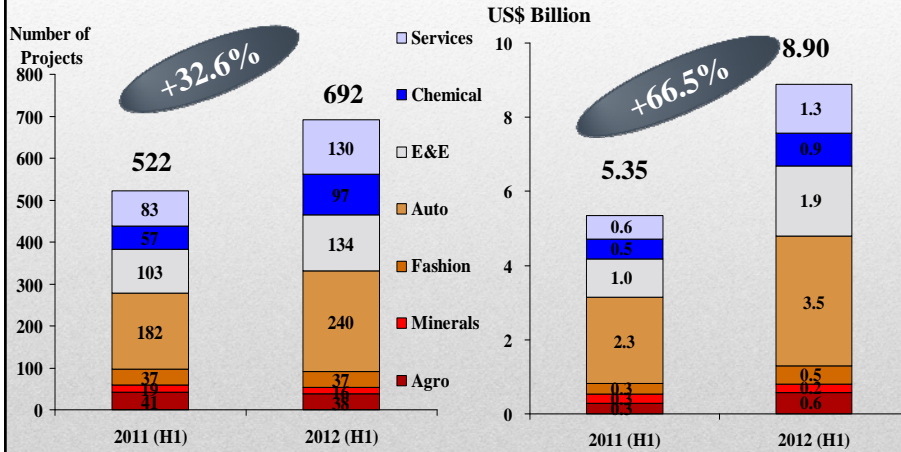
Source: BOI, as of 17 Jan 2012 Note:US\$1=Bt31.29 in Q2,2012

Comparison of Net Foreign Applications for Investment Jan-Jun 2011 vs Jan-Jun 2012

2011年1-6月与2012年同期外商投资项目申请比较

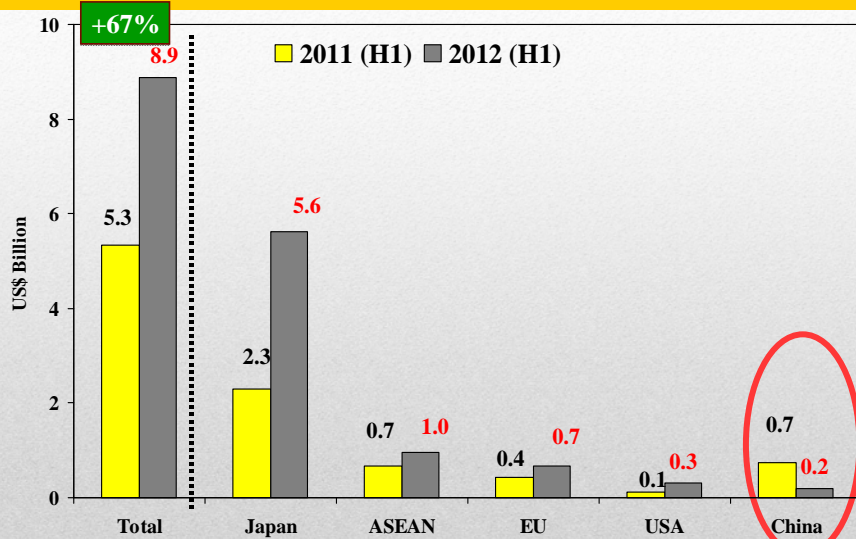
Number of Projects 项目数量

Amount Invested 投资金额



Source: BOI, as of 12 July 2012 Note: US\$1=Bt31.29 in Q2,2012

Foreign Direct Investment Applications 2011-2012 (Jan-June)
外商直接投资申请 2011-2012 (一月-六月)



Source: BOI, as of July 9, 2012 Exchange rate: US\$1=Bt31.29 in Q2, 2012

Chinese Investment Applications

Totals by Sector: 2007 – 2012 (Jan-Jun)

中国投资项目申请行业类别总数：
2007-2012（1月至6月）

Sector行业	Projects 项目数	US\$ Million 百万美元
Agricultural Products 农产品	37	482
Minerals and Ceramics 矿产业和陶瓷业	12	616
Light Industries/Textiles 轻工业/纺织品	21	130
Metal Products and Machinery 金属制品和机械	38	1,400
Electric and Electronic Products 电气和电子产品	26	116
Chemicals and Paper 化工制品和纸	32	272
Services 服务业	14	1,130
TOTAL 合计	180	4,146

Source: BOI, as of July 30, 2012. Note: Exchange rate: US\$1=Bt31.029 in Q2, 2012

Major Chinese Investors in Thailand

（中国在泰国主要投资企业）

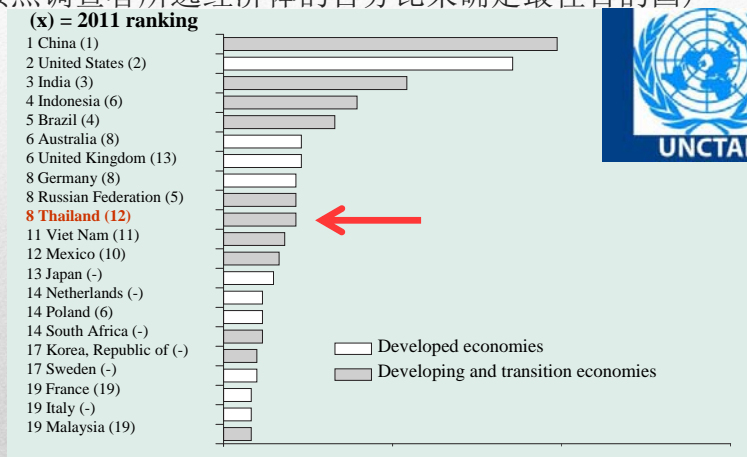
Company（企业）	Business（业务）
Holley Group Electric (Thailand) 华立（集团）泰国电气有限公司	Electricity Power Meters （电表）
Huawei 华为	IT Services Trade（信息技术服务）
Haier（海尔）	E&E（电器）
CIMC（中国国际海运集团）	Trailer Parts（拖车部件）
Shandong Linglong Tire Co.,Ltd. 玲珑轮胎	Tire（轮胎）
Hangzhou Zhongce Rubber Co.,Ltd 杭州中策橡胶有限公司	Tire（轮胎）
Niran (Thailand) Co.,Ltd. 宁朗（泰国）有限公司	Citric Acid（柠檬酸）

Investment Environment and Opportunities

投资环境和机遇

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

2012–2014年跨国公司预测最有潜力的经济体
(按照调查者所选经济体的百分比来确定最佳目的国)



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 泰国
18	Malaysia 马来西亚
83	Brunei Darussalam 文莱
98	Vietnam 越南
129	Indonesia 印度尼西亚
136	Philippines 菲律宾
138	Cambodia 柬埔寨
165	Laos PDR 老挝

The World Bank ranks Thailand among the easiest places to do business in Asia and 17th in the world
 世界银行评定易商环境国家排名 泰国排在亚洲前列 并排名世界第17名



Source: Doing Business 2012
 World Bank Survey Comparing 183 Countries

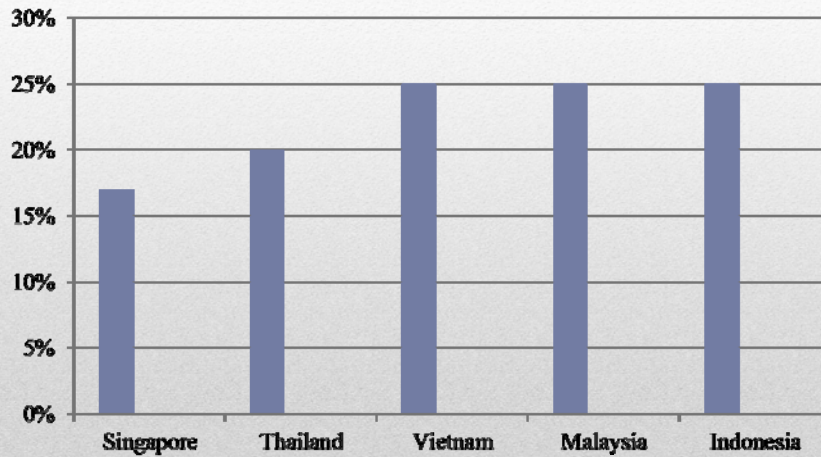
Cost of Living Survey 2012 2012年生活成本调查

Cities March 2012

Tokyo	1
Osaka	3
Hong Kong	9
Singapore	6
Beijing	17
Shanghai	16
Jakarta	61
Bangkok	81
Kuala Lumpur	102
Hanoi	136

Source: World Cost of Living Survey 2012, Mercer Human Resource Consulting, as of Jun 13, 2012
 Survey from 214 cities

ASEAN Corporate Income Tax 2013 2013年东盟企业所得税



Source: KPMG

AEC SNAPSHOT 东盟经济共同体概述



Macro-Economic Basics

宏观经济基础

- GDP (2011): US\$2,112.4 Bn*
- 国内生产总值(2011):21,124亿美元
- GDP per capita: US\$3,376
- 人均国内生产总值: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: 6亿人
- Area: 4.46 million km²
- 面积: 446万平方公里

• IMF Forecast
• 国际货币基金组织预测

Source: Tilleke and Gibbins & IMF Forecast as of April 23, 2012

Thailand is ready toward AEC 2015

泰国为2015年东盟经济共同体合作蓄势待发



High Speed Train 高速列车



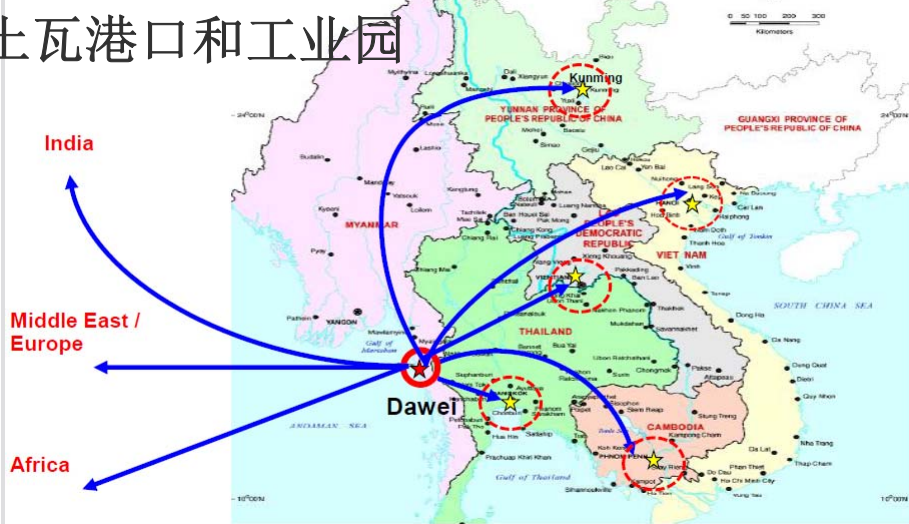
Route 路线	From 至	To 到	Distance 路程	Budget 预算 (Million US\$) (百万美元)
North 北部	Bang Sue 挽是	Chiang Mai 清莱府	745 km. 745公里	7,300
North-East 东北部	Bang Sue 挽是	Nong Khai 廊开府	615 km. 615公里	3,100
East 东部	Makkasan 玛卡汕	Rayong 罗勇府	330 km. 330公里	2,300
South 南部	Bang Sue 挽是	Hua Hin 华欣府	225 km. 225公里	2,600



Source: NESDB, as of March 25, 2011

DAWEI PORT AND INDUSTRIAL ESTATE

土瓦港口和工业园



Target Industries from China 来自中国的目标产业

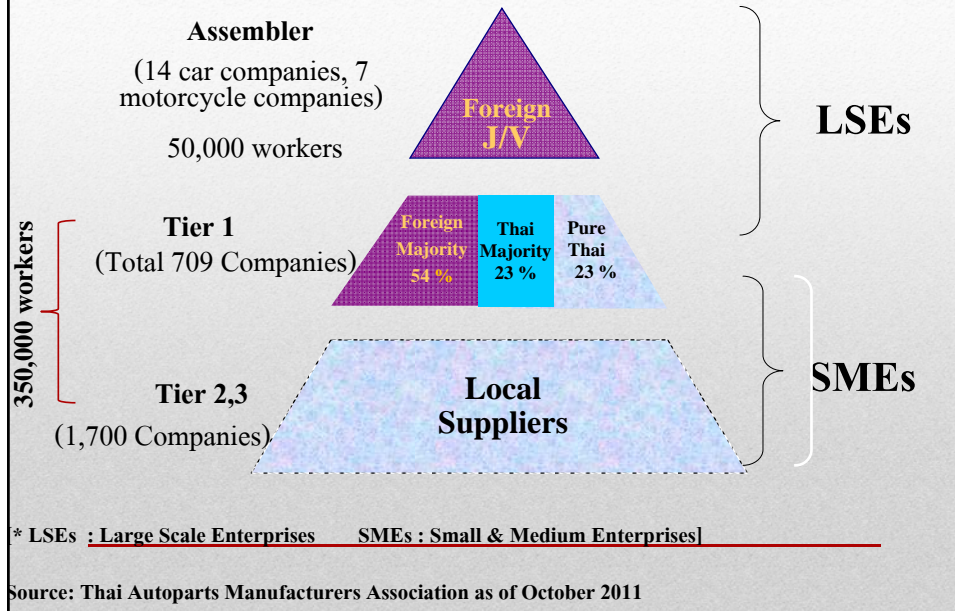
1. Auto and Auto Parts 汽车及其零配件
2. Electronic products and parts 电子产品及其部件
3. Machinery, equipment and parts 机械设备及其配件
4. Alternative energy 替代能源
5. High value added natural rubber product

高附加值的天然橡胶产品

Thailand's Automotive Industry Overview 泰国汽车产业总体概况

Thailand: 15 th largest automobile producer in the world in 2011 泰国： 2011年世界最大汽车生产国排名第 15 位。	Target: Top-10 by 2014, when local capacity projected at 2.43 million units 目标： 2014年挺进前 10 名，同时国内投资投资项目达到 243 万项。	Output: 14 assemblers with a combined production of 1,457,795 units in 2011 (50.46% for export) 输出： 2011年间 14 间装配车间总生产 1,457,795 辆汽车。(50.46%用于出口)	High local content : 80-90% for pick-up and 30-70% for passenger car 当地含量高： 80%-90% 的轻型货车， 30%-70% 的客车。
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Structure of Thai Automotive Industry 泰国汽车行业结构



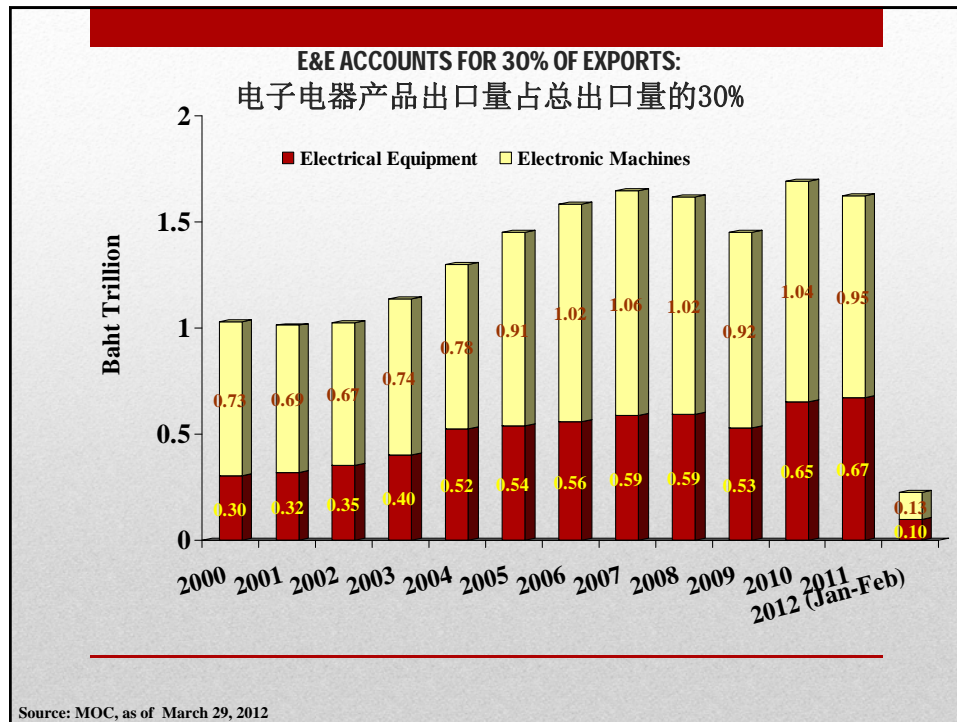
56 of Top 100 Global Suppliers 2010 Active in Thailand 2010年，在泰国经商的56名全球100强供应商

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



Electronics and Electrical Industry

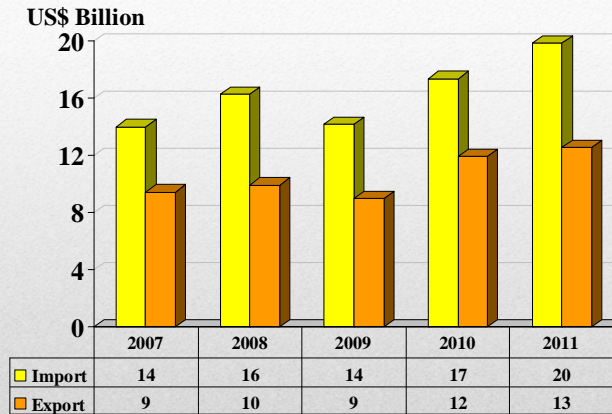
电子和电气产业

- Thailand Exports Ranked 24th in the World
- 泰国出口世界排名第24位。
- E&E exports **US\$53.95 billion** in 2011, 23% of total exports
- 2011年电子和电气出口值达**539.5亿美元**，占总出口值的23%。
- Major products: **HDD, IC, TV, A/C & other WG**
- 主要产品：**硬盘驱动器，集成电路，电视，空调和其他波导管**
- Thailand is the **world's largest producer** of HDDs
- 泰国是**世界上最大的硬盘驱动器生产国**。
- A leading country in the manufacture of **integrated circuits and white goods**
- 是制造**集成电路和大型家用电器的领先国家**
- Strong supporting industries for electrical appliances
 - **Compressors, motors, plastic and metal parts**
 - 强大的电气制品辅助产业
 - **压缩机，电动机，塑料和金属零配件**



Source: Electrical and Electronics Institute, as of February'12

MACHINERY AND PARTS: IMPORTS AND EXPORTS, 2007 – 2011
 2007年 - 2011年泰国工业机械及其零配件进出口概况



Source: Ministry of Commerce, 2 February 2012 Note: US\$1=Bt30.49 in 2011

OPPORTUNITIES IN MACHINERY 机械行业的机遇

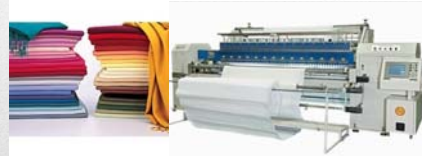
- Thailand continues to industrialize, but is dependent on foreign industrial machinery for immediate future.

泰国持续实现工业化，但关键还是依靠未来外国机械工业的发展。



- High demand for: 高需求:

- Food and farm machinery 食品和农业机械
- Alternative energy/energy conservation machinery 替代能源/节能机械
- Textile machinery 纺织机械
- Automotive machinery 汽车机械
- Mould & Die Industry 模具和钢模机械



Thailand's Alternative Energy Development Plan
泰国替代能源发展计划

Target 25 % of RE in Total Energy Consumption By 2021
目标为2021年前，再生能源占总能源消耗的 25 %

Solar 太阳能	Wind 风力	Hydropower 水力	New type of energy 新种能源		
2,000	1,200	1,608MW	Tidal Wave 潮汐	Geothermal 地热	
MW	MW		2MW	1MW	
3,200MW			3MW*		
Bio energy 生物质能源			Bio fuel 生物质燃料		
Biomass 生物质	Biogas 生物质 气体	Solid waste 固体 垃圾	Ethanol 乙醇	Bio-diesel 生物质柴油	New types to replace diesel (hydrogen) 新种替代柴油 (氢气)
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		

Source: Ministry of Energy *Megawatt (million watt) **Million litres/day 来源：能源部 *百万瓦特 **百万公升/日

“ADDER”: FEED-IN PREMIUMS 定期关税补助

Fuel 燃料	Adder 补助 (B/kWh) (US\$)	Supporting period 支持期限 (Year) (年)
<input type="checkbox"/> Biomass 生物质能 - Installed capacity <= 1 MW 装机容量 <= 1兆瓦 - Installed capacity > 1 MW 装机容量 > 1兆瓦	0.50 0.30	7 7
<input type="checkbox"/> Biogas (all categories of production sources) 沼气 - Installed capacity <= 1 MW 装机容量 <= 1兆瓦 - Installed capacity > 1 MW 装机容量 > 1兆瓦	0.50 0.30	7 7
<input type="checkbox"/> Waste (community waste, not hazardous industrial waste, and inorganic waste) 废弃物 - AD & b LFG 沼气 - Thermal Process 热工过程	2.50 3.50	7 7
<input type="checkbox"/> Wind power 风力 - Installed capacity <= 50 kW 装机容量 <= 50 兆瓦 - Installed capacity > 50 kW 装机容量 > 50兆瓦	4.50 3.50	10 10
<input type="checkbox"/> Mini and micro hydropower 小型微型水电厂 - capacity 50-200 kW 装机容量 50-200兆瓦 - capacity < 50 kW 装机容量 < 兆瓦	0.80 1.50	7 7
<input type="checkbox"/> Solar power	6.50	10

Source: DEDE's Presentation by Deputy Director-General, as of Feb 21, 2012

RUBBER INDUSTRY OVERVIEW 橡胶行业概述

Thailand's Rubber Industry 泰国橡胶工业

The world's largest producers of rubber
泰国是全球最大的橡胶生产国

Only 10% of rubber produced in
Thailand has been utilized as raw
material for rubber industry
只有约百分之十的橡胶原料在国内生产，其余作为原料出口。

China as the largest export market with
the total value of 153.27 Billion Baht
中国是泰国最大的出口国，出口总额为1532.70 亿泰铢。

Thailand's Rubber Exports 泰国橡胶出口

Total export value in 2011: 397.07 Billion
US\$(as the 5th top export item)
2011年总值：3970.07 亿泰铢（橡胶为第五大出口产品）。

The example of Chinese companies that
import rubber from Thailand:

- Linglong tyre
- Hangzhou zhongce
- Guangdong nongken

从泰国进口橡胶的中国公司例子：

- 玲珑轮胎
- 杭州中策
- 广东农垦

Incentives for Rubber Industry 橡胶工业的优惠政策

2.1: Incentives for Manufacture of Products from Natural Rubber (category 1.16)

天然橡胶产品生产行业的鼓励政策（1.16组）

- 8-year corporate income tax exemption with cap, regardless of location
- 不论项目所在何区，免缴八年法人所得税，有免税上限。
- Exemption of import duties on machinery regardless of location
- 不论项目所在何区，免缴机械进口税。
- Additional incentives for projects in zone 3
- 设在三区的投资项目另享受额外鼓励政策。

2.2: Incentives for Manufacture of vehicle tires (category 4.10)

轮胎生产行业的鼓励政策（4.10组）

- Including all above incentives.
- 包括以上所有优惠政策
- 5-year corporate income tax 50% reduction, after tax exemption period
- 免税期满后，法人所得税减征50%，为期五年。

*Must be applied by December 2012

*申请须于2012年12月底之前提交

Unbeatable Thailand 无与伦比的泰国 Unparalleled Opportunities 无限可能的商机

Thailand as a hub of ASEAN 地理位置上，
泰国在东盟国家中起纽带的作用

Strong supply chain 强大的供应链

Liberal investment policy and financial policy
自由的投资政策及宽松的金融政策

Several major infrastructure investment projects
主要的基础设施项目

Cultural rich and friendly environment
多样化文化及友善的泰国人

BOI OFFICE IN SHANGHAI 泰国投资委驻上海办事处

Shanghai 上海

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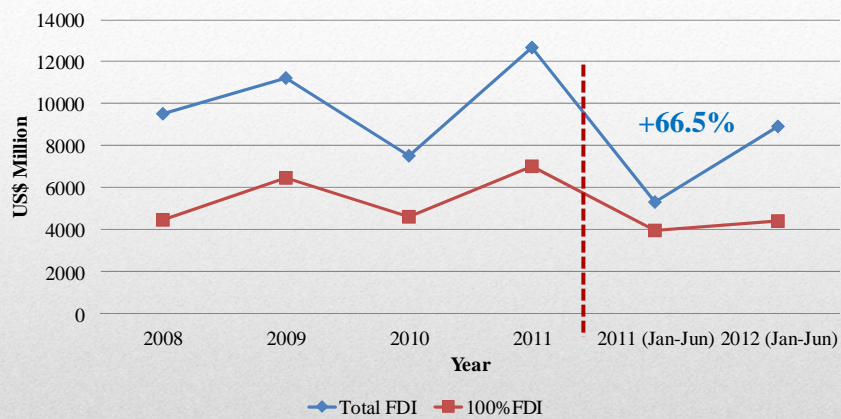
Email: shanghai@boi.go.th



Pittaya Lertmaharit

Director
主任

THANK YOU
谢谢



Foreign Direct Investment in Thailand 在泰国的外商直接投资

Source: BOI as of July 30, 2012 Exchange rate: US\$1=Bt31.29 in Q2, 2012