

Overview of Investment Opportunities in the Thai EV Market

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- About EVAT
- xEV Status in Thailand
- Outlook and Opportunities for Market Entrance



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EVAT – Electric Vehicle Association of Thailand



- Established: Nov. 2015
- Goal:
- Reduce air pollution
 - Improve energy efficiency in the Transport sector
- Supports: Industrial Manufacturing, R&D on EV technologies



EVAT Membership



Corporate Member

190
Members

Individual Member

99
Members

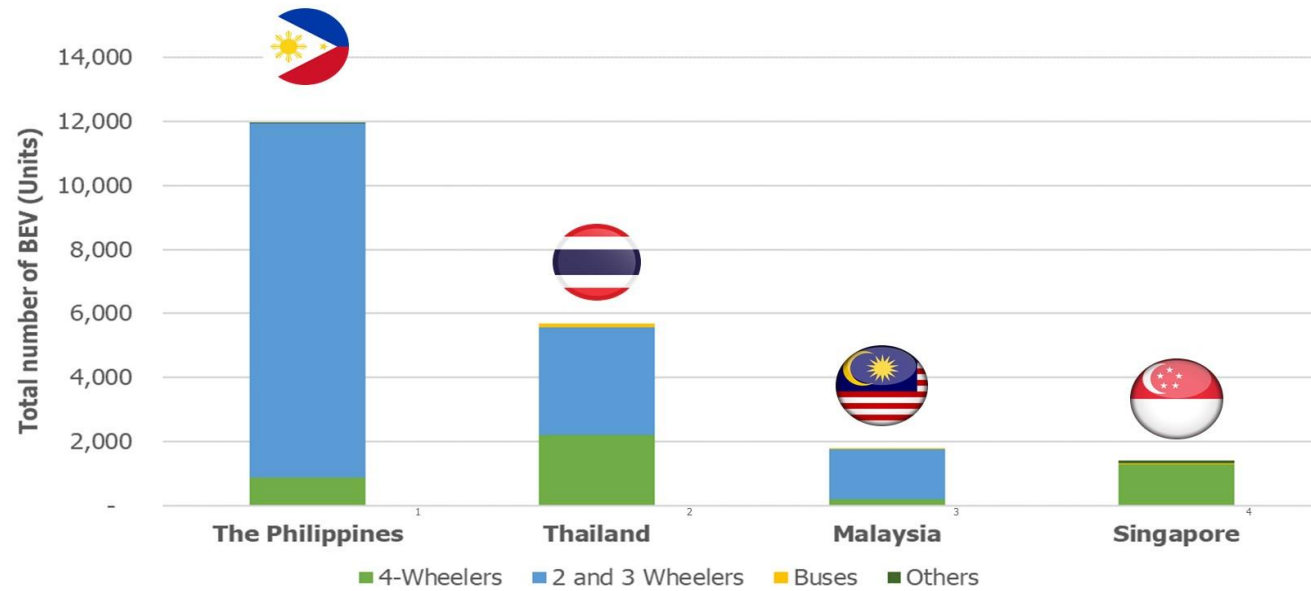
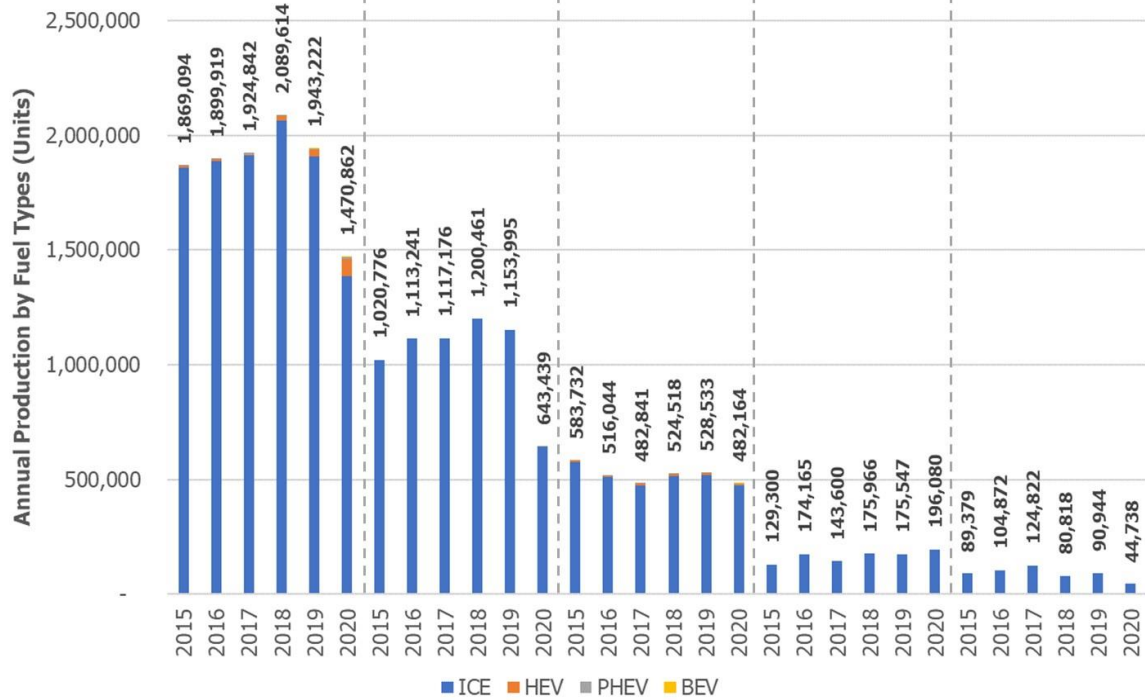


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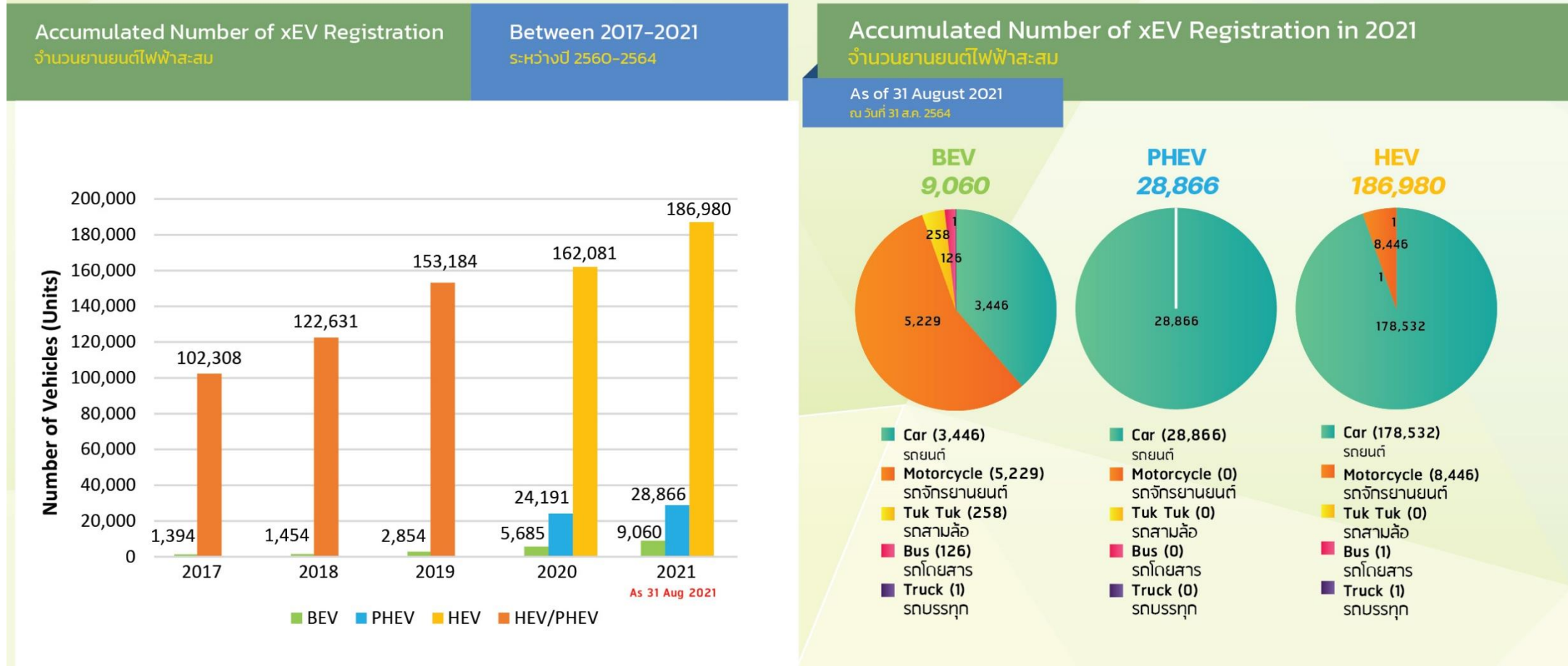
Automotive Production & BEV Registration in Southeast Asia



Source:

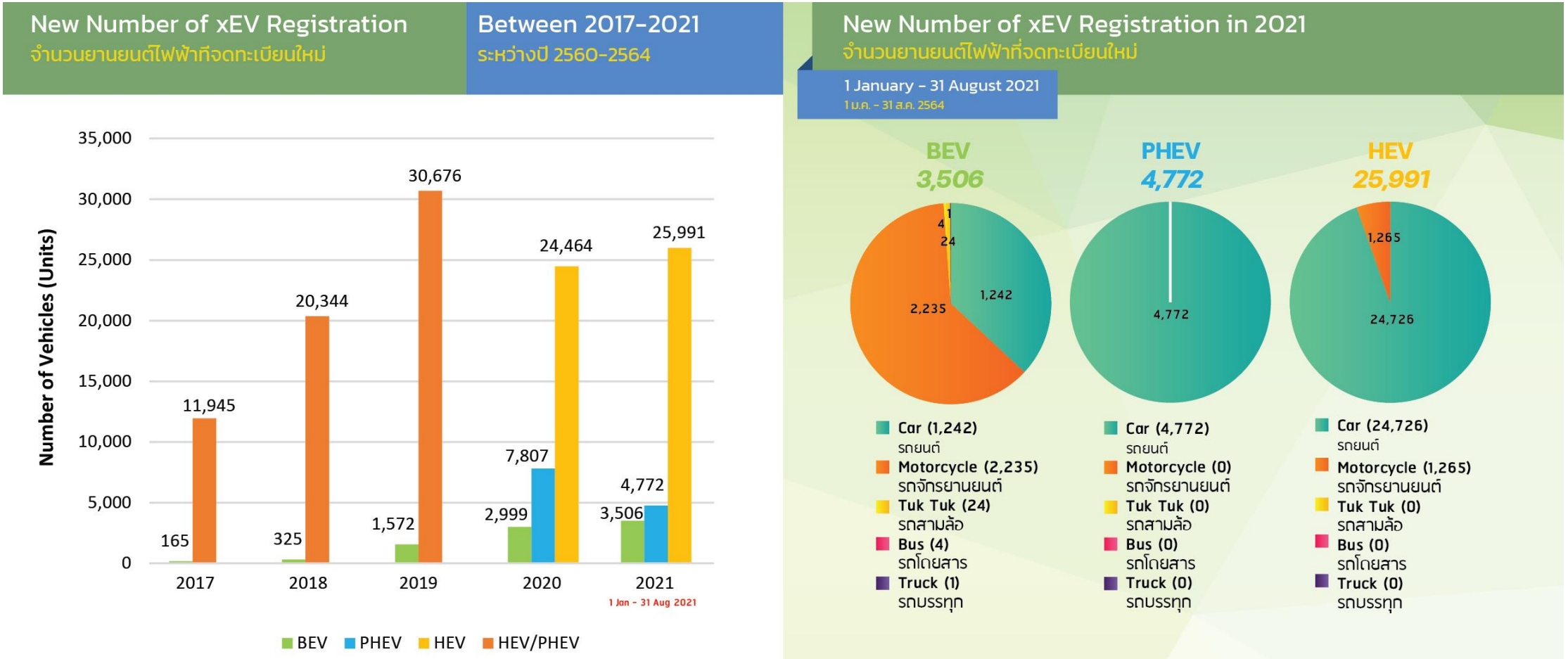
- ¹ Land Transportation Office, as of 2019
- ² Department of Land Transport, as of December 2020
- ³ Electric Vehicle Association of Malaysia (EVAM), as of May 2019
- ⁴ Vehicle Population by Type of fuel used, as of June 2020

Current Status of xEV Accumulated Registration in Thailand



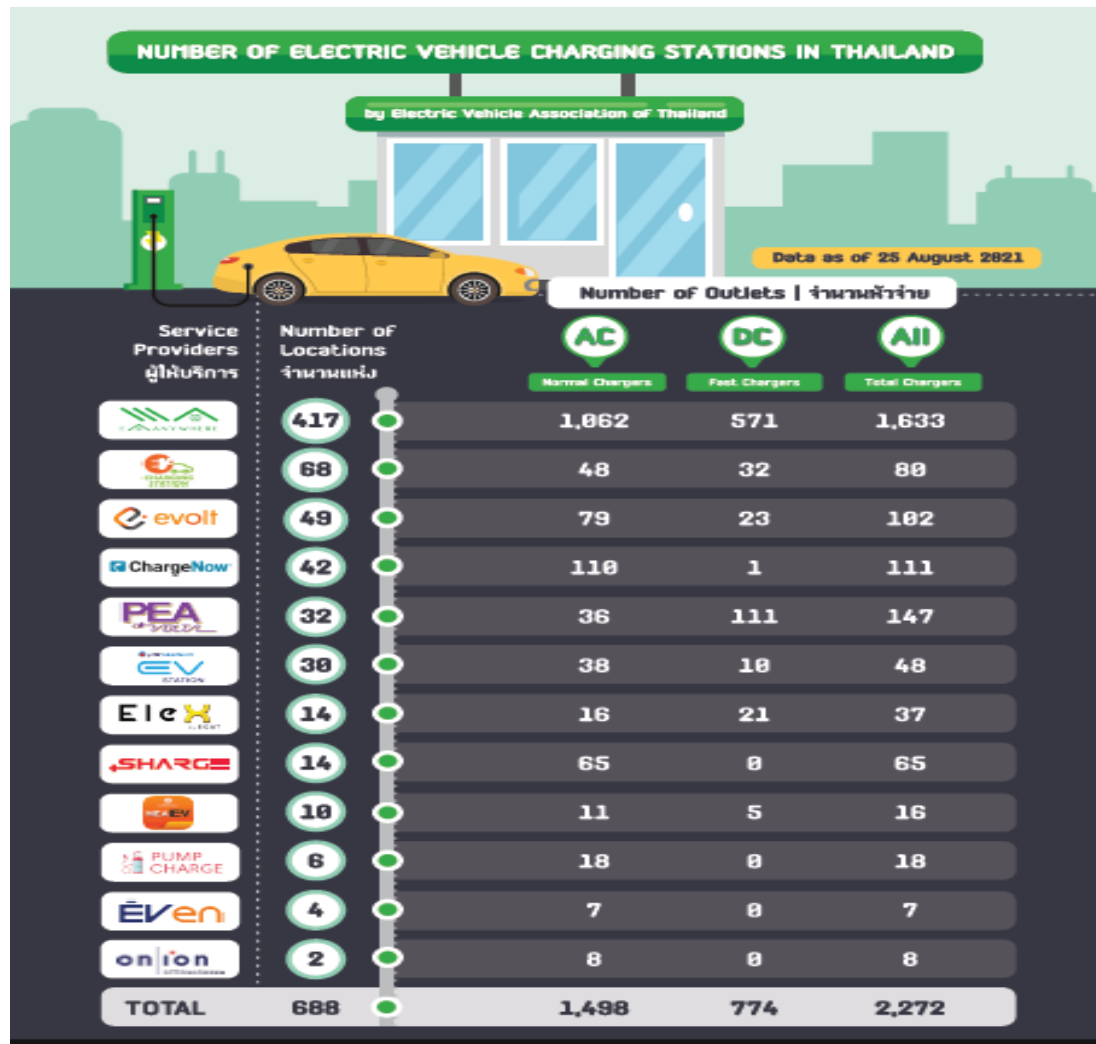
Source: Electric Vehicle Association of Thailand

Current Status of xEV Annual Registration in Thailand



Source: Electric Vehicle Association of Thailand

Total Number of Charging Stations in Thailand.



Source: Electric Vehicle Association of Thailand

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Thailand's ZEV Targets for All Types of Vehicles.



Target	Type of Vehicles	Estimated number of ZEV per Year		
		2025	2030	2035
Usage	Passenger cars / Pick up trucks	225,000 (30%)	440,000 (50%)	1,154,000 (100%)
	Motorcycles (units)	360,000 (20%)	650,000 (40%)	1,800,000 (100%)
	Buses	18,000 (20%)	33,000 (35%)	83,000 (100%)
	Tuk Tuks	500 (85%)	2,200 (100%)	2,800 (100%)
	Ships	130 (12%)	480 (35%)	1,800 (100%)
	Rail system	620 (70%)	850 (85%)	1,170 (100%)
Production	Passenger cars / Pick up trucks	225,000 (10%)	725,000 (30%)	1,350,000 (50%)
	Motorcycles (units)	360,000 (20%)	675,000 (30%)	1,850,000 (70%)
	Buses	18,000 (35%)	34,000 (50%)	84,000 (85%)
	Tuk Tuks	500 (85%)	2,200 (100%)	2,800 (100%)
	Ships	130 (12%)	480 (35%)	1,800 (100%)
	Rail system	620 (100%)	850 (100%)	1,170 (100%)

Source : National EV Policy Committee

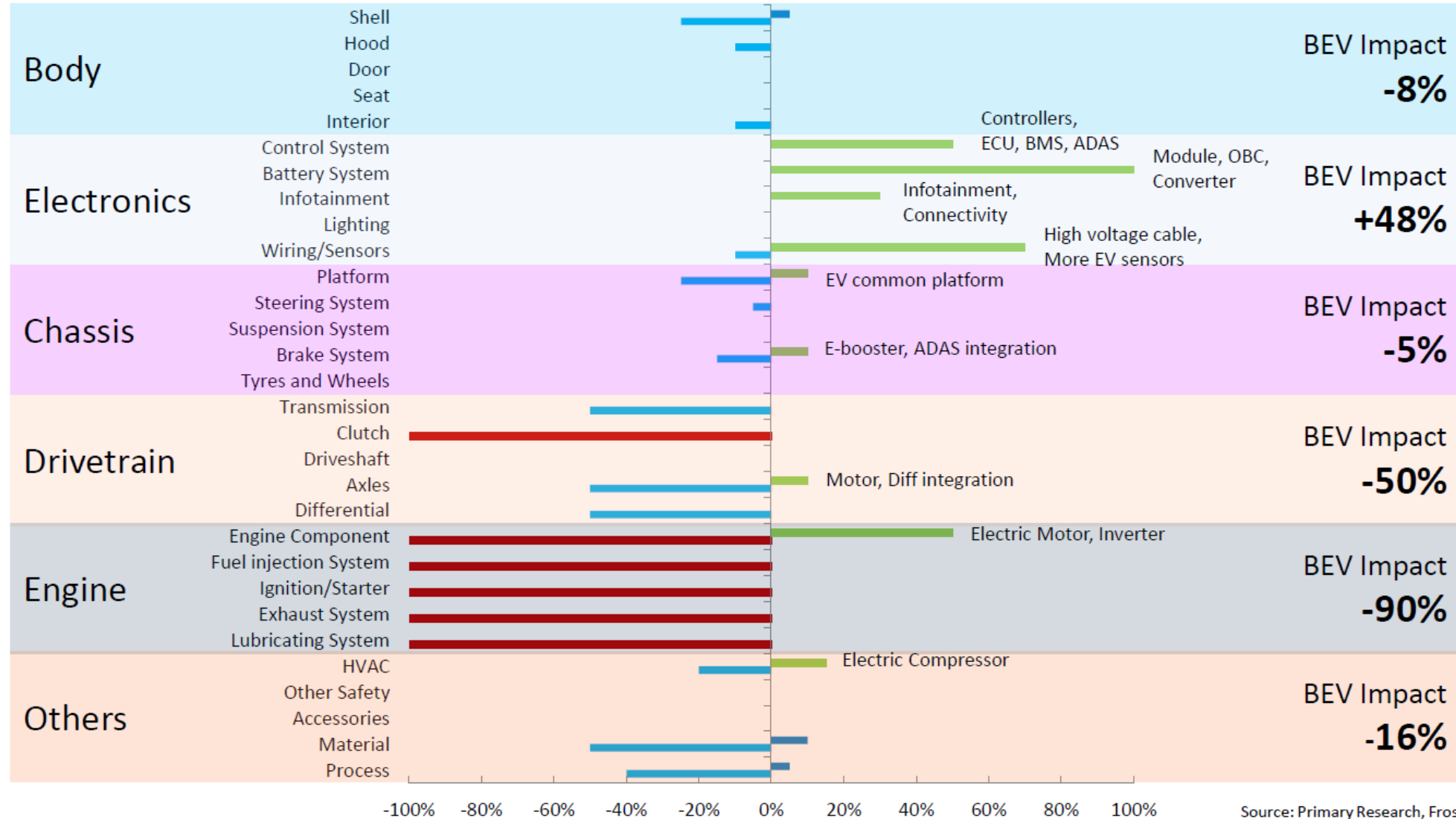
Charging Infrastructure Targets.



Passenger Cars and Pick Up Trucks		
Year	Accumulated targets of ZEV cars (million units)	DC Quick charger targets
2025	0.4	2,200-4,400
2030	2.0	12,000
2035	6.4	36,500

Electric motorcycles				
Year	Accumulated targets of electric motorcycles (million units)	Charger targets	Estimated 2% electric motorcycle taxi	Charger targets
2025	0.6	1,600	12,000	260
2030	3.3	8,000	65,000	1,450
2035	8.8	20,000	176,000	4,000

IMPACT ANALYSIS, POSITIVE IMPACT ON ELECTRONIC PARTS & NEGATIVE ON ENGINE PARTS.

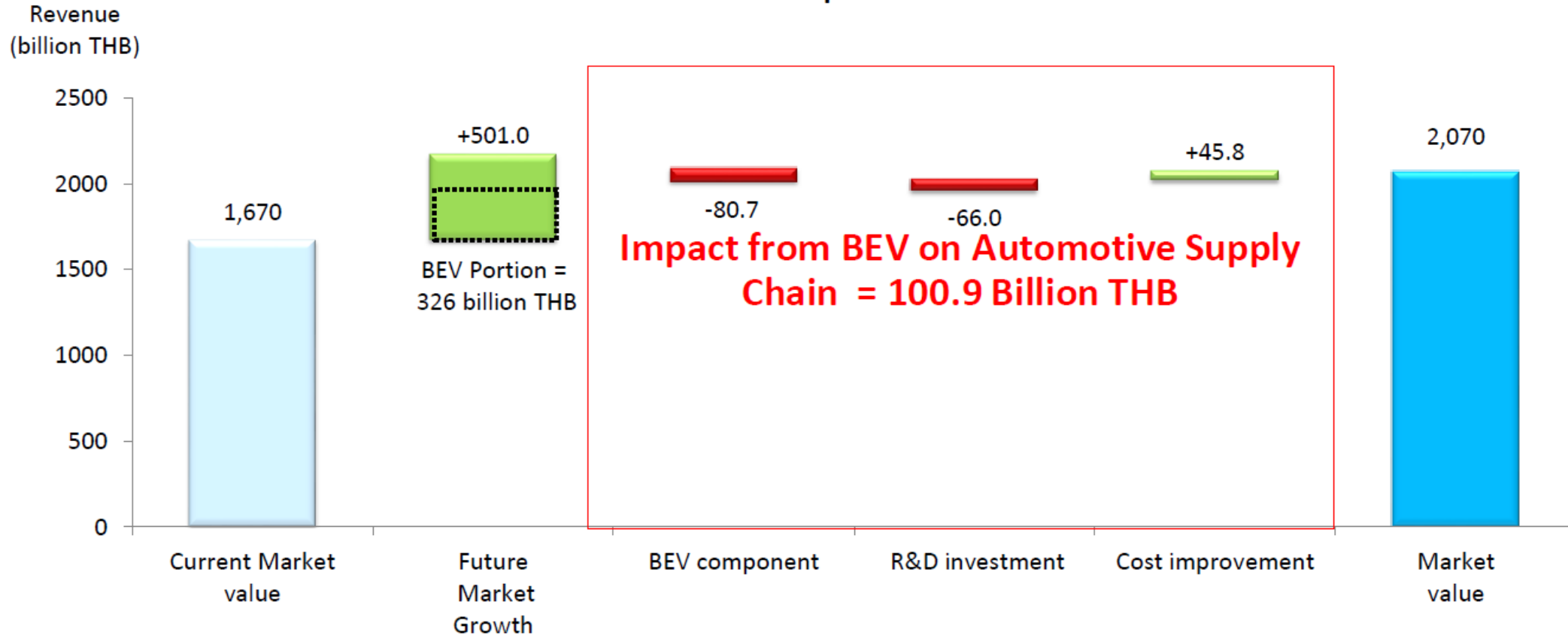


Source: Primary Research, Frost & Sullivan

IMPACT ASSESSMENT OF PRODUCTS IN TOTAL. POTENTIAL LOSS OF OVER 100 BILLION THB, BUT MARKET VALUE INCREASE IN TOTAL BY 2030.



Revenue Projection for Automotive Suppliers
due to BEV impact in 2030



Source : Frost & Sullivan

Thank You



Electric Vehicle Association of Thailand (EVAT)

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