THAILAND
BOARD OF
INVESTMENT

E&E INDUSTRY

E&E AS A LEADING SECTOR OF THE COUNTRY

The electronics and electrical industry is pivotal to Thailand's economy, contributing significantly to GDP while driving technological advancement, exports, and job creation. In 2023, Thailand's E&E manufacturing industry produced a total of 97.94 billion USD worth of electrical, electronic, and power electric products, marking a 6.23% increase year on year in production output value.[1]

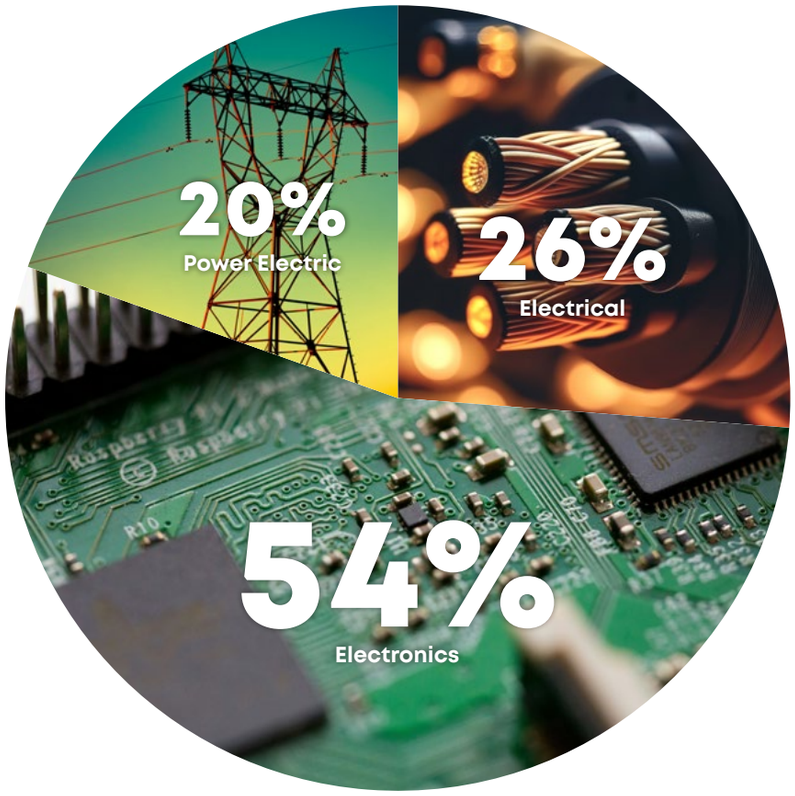
As a key player in Southeast Asia's manufacturing hub, Thailand benefits from a robust ecosystem of electronics production, fueling economic growth and enhancing global competitiveness, positioning it as a preferred destination for investment and innovation in the digital age.

Domestic Product in 2023 by Product Sector

Total Value

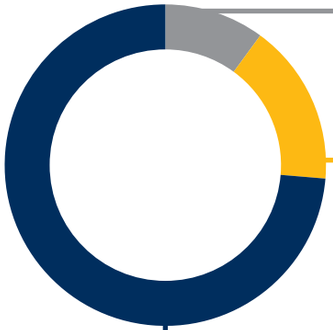
97.94

Billions USD



Source: [1]Thaieei

EXPORT OF E&E PRODUCTS FROM THAILAND



10.06%
are accounted
by Electrical products export

16.27%
are accounted
by Electronic products export

E&E accounted for
26.33%
of total Thailand export
in 2023

Top three E&E exported products in 2023 with percentage share of E&E export value

15.51% Computer parts and components

12.55% Integrated Circuited (IC)

7.13% Air conditioner

The E&E sector is tremendously crucial to Thailand's economy, accounting for over a fourth of Thai exports[1]. Among the top three exported products are computer parts and components, integrated circuits, and air conditioners[2]. Additionally, Thailand holds a significant global position as a producer of HDDs (Hard Disk Drives), ranking as the world's second-largest HDD exporter with a market share of 22.4% in 2022[3].

Air conditioners stand out as the third most valuable export product in the E&E industry, and notably, Thailand leads among electrical product exports. In 2022, Thailand emerged as the world's second-largest exporter of air conditioners, with a value of approximately 7 billion USD and a 11.6% share of the global total export[4].

Source: [1]Ministry of Commerce, [2]Thaieei, [3]SCB EIC, [4]worldstopexports

STRUCTURE OF THAILAND'S E&E VALUE CHAIN

SUPPLIER

Upstream

3rd – Tier Suppliers
IC Design
Wafer Fabrication

Wafer, Plastic, Metal, Aluminum, Lead, Copper, Glass, Tantalum, Silicon, Silver, Tooling

Midstream

2nd – Tier Suppliers
Manufacturing and Assemble of Semiconductor, Electrical and Electronic Parts

PCB
Suspension
Motor Parts
Sub-Assembly & Coil

1st – Tier Suppliers

Head Gimbal Assembly, Head Stack Assembly, Motor
Base/Cover, Actuator, PCBA, IC, Transistor, Diodes

ENTREPRENEURS

Downstream

Assembly of the final products, Electronics Manufacturing Service (EMS) or Brand Owner

The E&E industry in Thailand encompasses a comprehensive supply chain, divided into three key components: suppliers, entrepreneurs, and the support sector. Firstly, the supplier sector comprises manufacturers, categorized into three tiers based on their position in the production line, either upstream or midstream. Third-tier suppliers manufacture upstream goods like plastics, wafers, glass, and raw materials. Midstream products are generated by second-tier and first-tier suppliers. Entrepreneurs, the second sector, represent the final product brand owners responsible for assembling and marketing the end products. The support sector, the final component, comprises other relevant agents to the industry, including financial services, educational institutes, and government agencies.

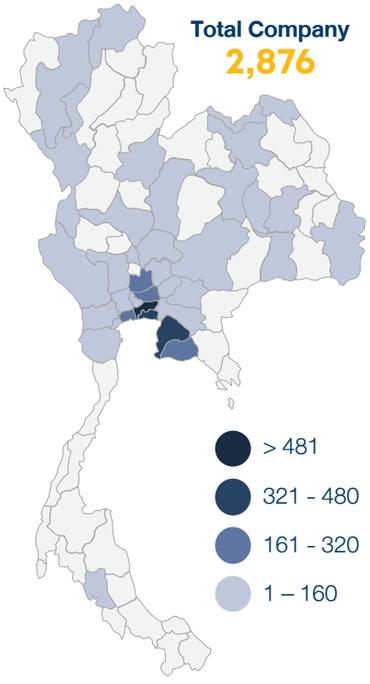
Source: Department of Intellectual Property

DEMOGRAPHIC OF THAILAND'S E&E INDUSTRY

update as of March 2024

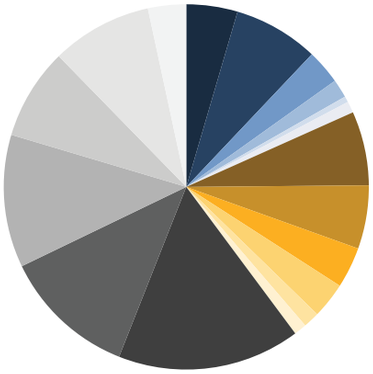
The Thai E&E industry is geographically dispersed across the country, with a significant concentration of companies in the Bangkok metropolitan area and the Eastern Economic Corridor (EEC) area, hosting 1,786 and 680 companies, respectively. E&E companies are spread across 37 provinces, ensuring widespread economic impact. Notably, 60.33% of these companies are small-sized, with medium and large companies sharing similar proportions. Smaller companies predominantly specialize in electrical parts production, while larger companies are more inclined towards electronic product manufacturing.

Company by Province



Source: Thaieei

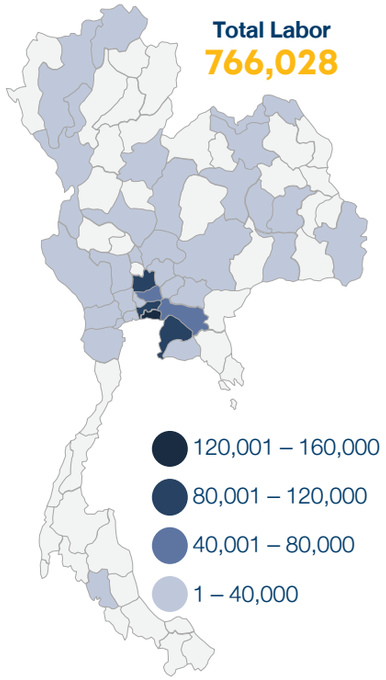
Company by Size and Production Sector



Large Company	**18.15%**
Electrical Parts	4.5%
Electronics	7.4%
Electrical	3.3%
Supporting Services	1.7%
Trader	0.5%
Other	1.0%
Medium Company	**21.52%**
Electrical Parts	6.6%
Electronics	5.6%
Electrical	3.6%
Supporting Service	3.1%
Trader	1.5%
Other	1.1%
Small Company	**60.33%**
Electrical Parts	16.3%
Electronics	11.9%
Electrical	11.8%
Supporting Services	8.0%
Trader	8.9%
Other	3.4%

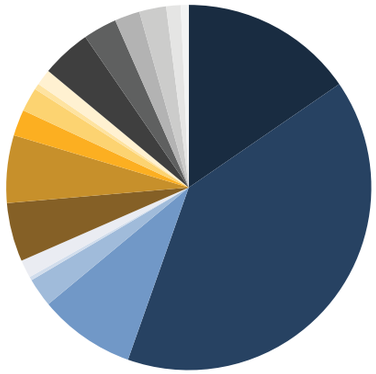
Similarly, the workforce in the E&E industry is concentrated in the Bangkok metropolitan region, the EEC, and Ayutthaya province. Two-thirds of employees are engaged with large companies, contrasting with only 14.16% working in small companies. Although a greater number of companies specialize in electrical parts production, half of the workforce is employed by electronic companies, while approximately a quarter are in the electrical parts sector.

Labor by Province



Source: Thaieei

Labor by Company's Size and Production Sector



Large Company	**68.02%**
Electrical Parts	15.6%
Electronics	39.3%
Electrical	8.6%
Supporting Services	2.6%
Trader	0.3%
Other	1.6%
Medium Company	**17.81%**
Electrical Parts	5.3%
Electronics	6.1%
Electrical	2.3%
Supporting Service	2.1%
Trader	0.6%
Other	1.5%
Small Company	**14.16%**
Electrical Parts	4.5%
Electronics	3.0%
Electrical	2.3%
Supporting Services	2.4%
Trader	1.3%
Other	0.7%

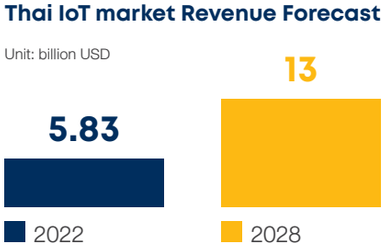
TRANSFORMATION TO BECOME A MORE MODERN AND INNOVATIVE INDUSTRY

Thailand is transforming toward modern technology and a smart economy. This transformation results in an increase in demand for IoT, smart electronic devices, and robotics/AI. The value of the IoT market revenue in Thailand is expected to double from 2022 to 2028[1].

The growth of the smart home device market also highlights this trend. Thailand's smart home market has expanded rapidly, integrating seamlessly into people's daily lives. Within seven years, from 2017 to 2023, the market revenue increased tenfold. It is expected to continue this trajectory, doubling the 2023 market revenue by 2028, which would be more than 13 times larger than a decade ago[1].

Thus, there are opportunities to produce E&E products to serve both consumers and manufacturers' domestic demand.

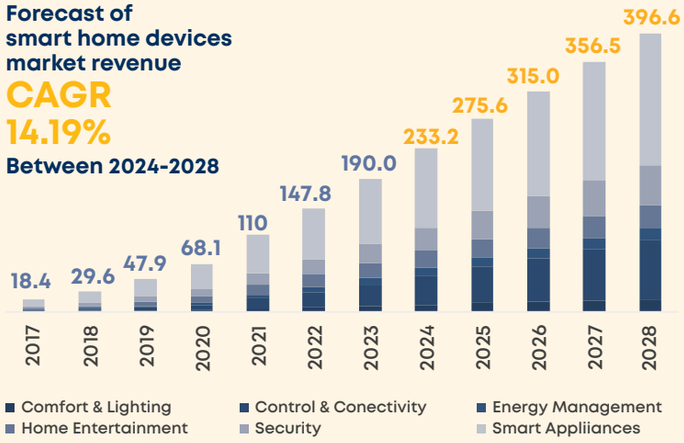
Thai IoT market Revenue Forecast



Forecast of smart home devices market revenue

CAGR 14.19%

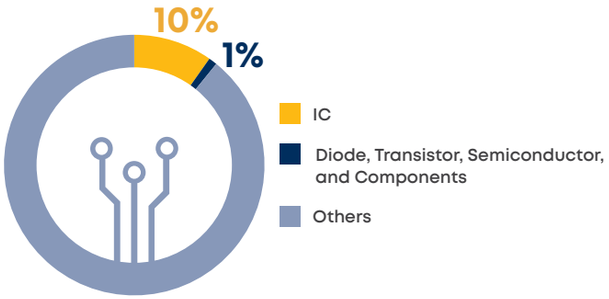
Between 2024-2028



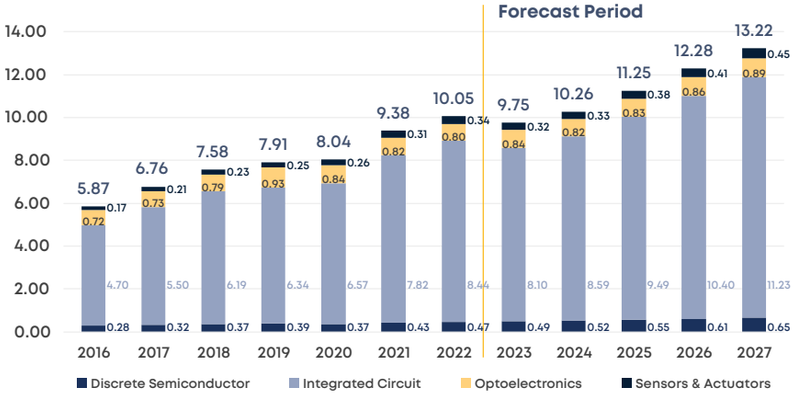
Source: [1]Statista

SEMICONDUCTOR AS A KEY DRIVER OF E&E INDUSTRY

Semiconductor are accounted for 10.84% of total E&E manufactured in 2023



Thailand's semiconductor industry has recently played a significant role in the Thai economy. Semiconductor products in Thailand can be divided into two types: Integrated Circuits (IC) and Diodes, Transistors, Semiconductors, and Components. ICs represent the majority of the Thai semiconductor market, valued at 9,595.66 million USD in 2023, compared to 1,023.93 million USD for Diode, Transistor, and Component values. In terms of value, IC products have experienced steady growth since 2020, reaching their peak in 2023, and are expected to continue growing[1].

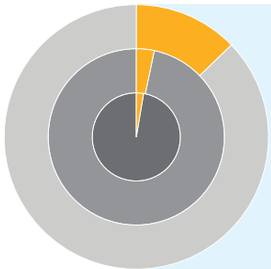


The semiconductor market in Thailand is expected to rise steadily from 2023 to 2027 across all products. Total revenue is forecasted to increase from 9.75 billion USD in 2023 to 13.22 billion USD in 2027. Integrated Circuits (IC) will remain a major semiconductor product during this period [2].

Source: [1]Thaieei, [2]Statista

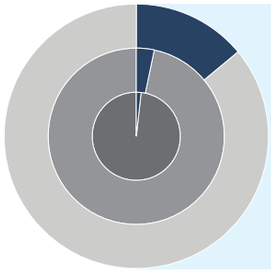
SHARE OF THAI SEMICONDUCTOR EXPORTS ON THE GLOBAL STAGE

EXPORT[1]



Global Rank 10th
Asia Rank 8th 3.27%
ASEAN Rank 4th 12.78%
semiconductor devices exporter by value

IMPORT[1]



Global Rank 16th
Asia Rank 10th 3.27%
ASEAN Rank 4th 13.99%
semiconductor devices importer by value

Thailand accounted for 2.65% of global total semiconductor devices export and 1.76% of total import in 2022[1]

Top three exported destination of Thai semiconductor products in 2021[2]

Hongkong	24%
ASEAN (combined)	24%
U.S.A	15%

Not only are semiconductors important for Thailand's economy, but Thailand is also demonstrating its significance in both the regional and global semiconductor device markets as an important exporter and a significant importer[1].

The largest destination for Thai semiconductor products in terms of exports is Hong Kong, with a 24% share, followed by the USA at 15%. ASEAN also represents a significant market, with combined semiconductor imports from Thailand comprising over 24% of the total export. Among ASEAN countries, Singapore is the largest destination, accounting for a 10% share of the total semiconductor exports[2].

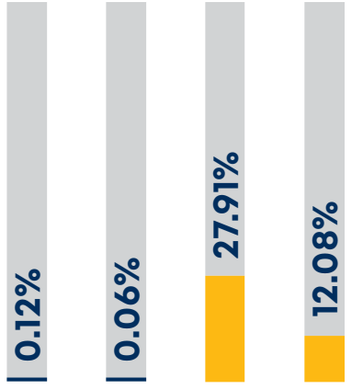
Source: [1]oec.world, [2]Trade Policy and Strategy Office

OPPORTUNITIES FROM THAILAND'S SEMICONDUCTOR SECTOR

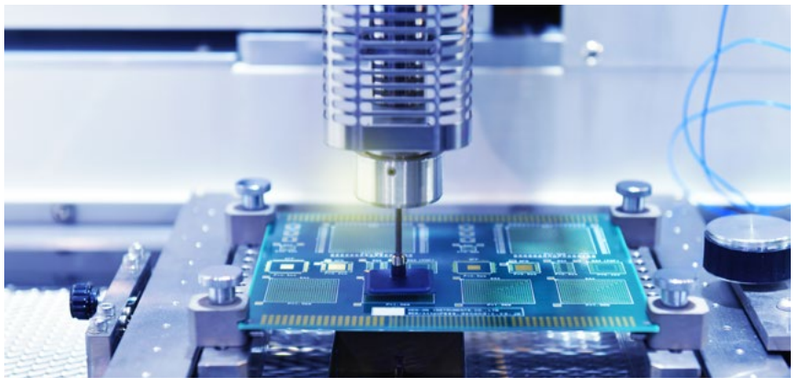
Thailand presents opportunities for producing semiconductor products due to the increasing demand from domestic use, particularly in the IC market.

In 2023

Only **0.12%** of IC domestic product were sold domestically and accounted for just **0.06%** of total used in domestic market

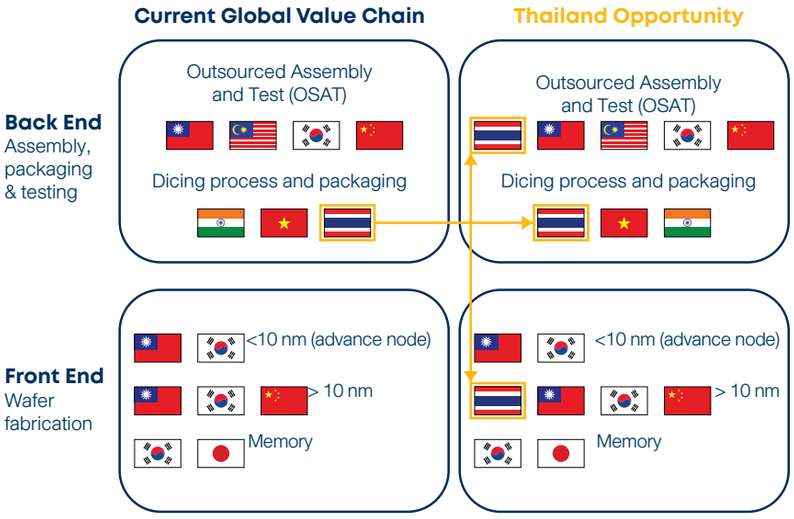


28% of Diodes, Transistor, Semiconductor, and Components domestic product were sold domestically and accounted for **12%** of total used in domestic market



Thai semiconductor production also has an opportunity to advance into more complex sectors within the semiconductor value chain. As of 2023, most semiconductor products produced in Thailand were exported, and nearly 100% of the ICs used in the domestic industry were imported, despite Thailand being a major player in the global IC market. A similar situation also exists in the Diodes, Transistors, Semiconductors, and Components market, with 28% of the products used domestically, accounting for 12% of the domestic use value. This indicates opportunities to expand Thai production to manufacture products that meet the country's domestic needs.

Source: Thaieei



With the industry's involvement in the global supply chain, Thailand has the capability to expand its involvement in other areas, including:

1 **Enhancement of Outsourced Assembly and Test to offer chip package services, chip assembly, and chip testing at similar levels of complexity.**

2 **Extension of its chip manufacturing services to include silicon wafer manufacturing (front-end processes).**

Thailand could expand into chip manufacturing with sizes larger than 10 nanometers, which represents less advanced technology compared to the cutting-edge, but still holds significant market value.

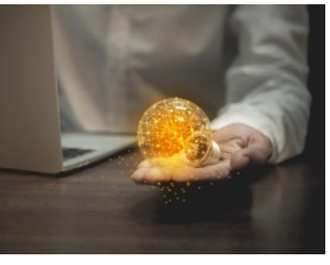
Source: SCB EIC

SUPPORTING FACTORS: POLICIES FOR THAILAND'S E&E INDUSTRY

The Thirteenth National Economic and Social Development Plan (2023-2027)

Milestone 6: Thailand is an ASEAN's hub for digital and smart electronics industry

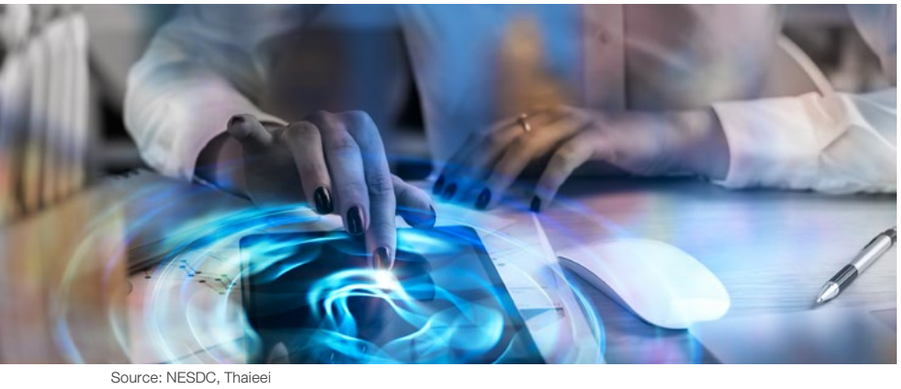
The Thai government recognizes the importance of the Thai E&E industry and the opportunities available for its growth. To support the development of the industry, several plans have been initiated. In Milestone 6 of the Thirteenth National Economic and Social Development Plan (2023 - 2027), one of the core strategies for the Thai economy aims to establish Thailand as ASEAN's hub for the digital and smart electronics industry, with three main targets:



Restructuring the manufacturing and service sectors towards an innovation-based economy by expanding the current electronics industry and shifting towards the smart electronics industry and shifting towards the smart electronics industry with a focus on manufacturing key parts in the ASEAN supply chain, which will be of high value and high demand on future markets, together with boosting the digital industry's competitiveness.

Developing human capital for the new global era by creating a capable workforce in the smart electronics and digital service industry.

Enhancing Thailand's capability to cope with changes and risks under the new global context by encourage the use of digital technology in diverse sectors and dimensions.



Source: NESDC, Thaieei

The Office of Industrial Economics announced an action plan for smart electronics industry development phase 1 (2023-2027) to promote Thailand to become the center of electronic devices and smart electronics manufacturers in ASEAN and obtain their own technology by 2027 with four target groups including, **Smart Home, Smart Factory, Smart Hospital & Health, and Smart Farm.**

2 Targeted Indicator

1. **Smart electronics export value increase to account for 60% of total E&E export value by 2027**
2. **Smart electronics R&D investment are no less than 1% of GDP from industrial sector by 2027**

3 Main Measure

1. **To enhance the competitiveness of the existing smart E&E industry and encourage the development of new ones.**
2. **To stimulate demand and create domestic smart E&E consumption by defining or supporting government procurement to use smart E&E devices in government projects.**
3. **To create and develop the ecosystem for the smart E&E industry by developing high-skilled labor and infrastructure to support the expansion of the industry.**

Source: The federation of Thai Industries

SUPPORTING FACTOR: FACILITIES AND PLATFORMS

Several platforms and facilities have been established to support the research and innovation development of the E&E industry, with most of them being supported by government agencies.

Industrial IoT and Data Analytics (IDA) Platform[1]

A cooperative project between the National Science and Technology Development Agency and private sector partners that collects data from IoT devices installed on machines throughout the manufacturing chain. The aim of this project is to help firms digitalize manufacturing, increase production efficiency, and conserve energy.

NETPIE[2]

NETPIE is an IoT cloud-based platform-as-a-service that seamlessly connects IoT devices by transferring the complexity from application developers or device manufacturers to the cloud.

PTEC[1]

A center for the testing, certification, calibration, training, inspection, and site survey of electrical and electronic products.

Source: [1]NECTEC, [2]PTEC

SUPPORTING FACTOR: RESEARCH INSTITUTES

Thai government agencies have established institutes to study advancements in the Thai E&E industry. These institutes focus on both technology research and information research to help propel the industry forward.

Thai Microelectronics Center: TMEC[1]

A research institute under NECTEC focusing on the research and development of sensor and silicon-based electronic devices. The areas of research include Micro Electro-Mechanical Systems (MEMS), ISFET Platform, Wafer-level Sensor Prototyping, Integrated Circuits (IC), Surface Technology, and Microfluidic Devices.

Electrical and Electronics Institute[2]

An independent institute established by the Ministry of Industry with the aim of driving the usage of domestic products, expanding the export market, and providing quality and reliable insights into the E&E industry data.

Thailand Digital Valley (IoT & Digital Innovation Institute)[3]

The goal is to attract investments in EECd by building confidence and motivation, fostering collaboration between the private sector, education institutions, and the government on 30 acres in EECd. This initiative aims to create a digital ecosystem and open platform for startups, particularly in FinTech, AgriTech, TourismTech, HealthTech, EduTech, and GovTech.

Source: The federation of Thai Industries

SUPPORTING FACTOR: HUMAN RESOURCES

Thailand consistently produces a high number of higher education graduates each year. Among them, over sixty thousand graduated in the field of science and engineering, especially in areas related to the E&E industry such as electrical engineering, mechanical engineering, electronics engineering, chemistry, and physics. As a result, Thailand has a substantial number of skilled laborers to drive the development of the E&E industry and help the country thrive in this field.

Graduate in 2021 in Field of Sciences and Engineer

Unit: billion USD

Top Graduated in Related to E&E field

Electrical Engineering	Mechanical Engineering	Electronics Engineering	Chemicals	Physics
5,586	4,449	1,547	2,420	1,633

"Semiconductor and Advanced Electronics" Workforce Development Project[3]

Government Agencies

TMEC Thai Microelectronics Center · NXPO · NSTDA

Private Sector Companies

Analog Devices · PTT · Delta · HANA Microelectronics Group · HANA Semiconductor (Ayutthaya) Co., Ltd. · Infineon · Silicon Craft

Source: STEMplus, MHESI , [3]NXPO, [4]Khon Kaen University

BOI'S INCENTIVES ON E&E INDUSTRY

The BOI has announced the Five-Year Investment Promotion Strategy (2023-2028) on December 8, 2022, which is enforced from January 3, 2023, to attract companies with expertise or seeking to establish investments in targeted areas.

There are three main incentive including corporate income tax (CIT) exemption, other tax incentives, and non-tax incentives.

CIT exemptions period is vary depending on the activity or sector of the investment, lasting up to 13 years while Other tax incentives and non-tax incentives are applicable to all activities promoted under the scheme.

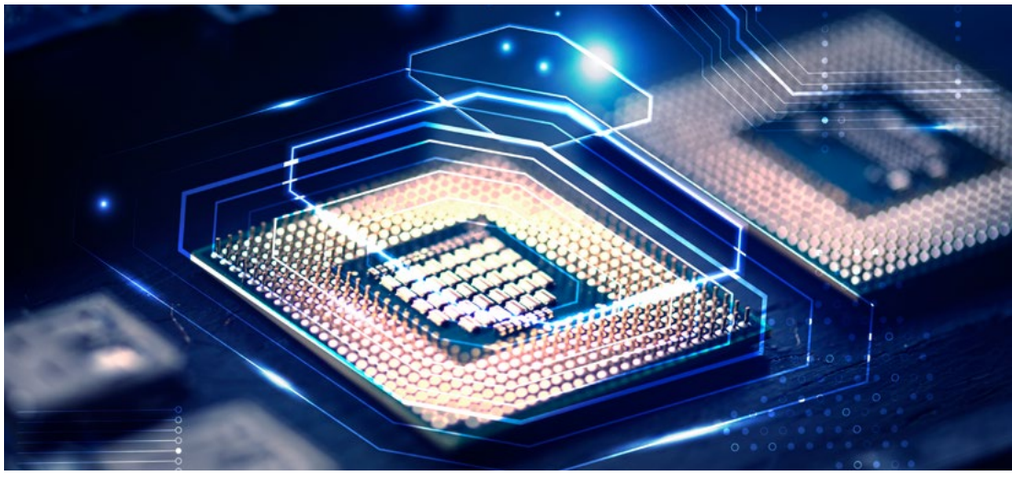
Other tax incentives, including

- exemption of import duties on machinery.
- exemption of import duties on raw materials used in production for export.
- exemption of import duties on raw materials used in research and development (R&D).

There are four non-tax incentives available for promoted companies, including

- permits to own land.
- permits to bring skilled workers and experts into the kingdom for investment-promoted activities.
- permits for foreign nationals to enter the Kingdom for studying investment opportunities.
- permits to remit money abroad in foreign currency.

All promoted activities are subject to specific conditions announced by the BOI that must be complied with.



Source: BOI

Activities	Promotion Group	CIT Exemption Period	Note
1. Electronic design i.e. microelectronics, optoelectronics or embedded systems			
	A1	8 years without limit on the CIT exempted	Additional conditions must be compline
2. Manufacture of electronic products, devices and parts			
2.1 Manufacture of wafer	A1+	13 years without limit on the CIT exempted	Project must have production process as approved by the Board
2.2 Manufacture or test of semiconductors and integrated circuits (IC)	A2,A3	5-8 years	CIT exempt period depend on capital investment. Additional conditions must be compline
2.3 Manufacture of electronic passive components i.e. resistors, capacitors and inductor	A2,A3, A4	3-8 years	CIT exempt period depend on capital investment and activities detail. Additional conditions must be compline
2.4 Manufacture of circuit board and/or parts	A2,A3,B	0-8 years	
2.5 Manufacture of printed circuit board assemblies (PCBA) and downstream products from PCBA in the same project.	A3,A4,B	0-5 years	
2.6 Manufacture of printed electronics	A2, A4	3-8 years	CIT exempt period depend on numbers of material use. Additional conditions must be compline
2.7 Manufacture of parts, data storage and memory storage	A2, A3, A4	3-8 years	CIT exempt period depend on activity details. Additional conditions must be compline
2.8 Manufacture of energy storage	A1, A2, A3, B	0-8 years (without limit on the CIT exempted)	
2.9 Manufacture of flat panel displays and parts	A3, B	0-5 years	
2.10 Manufacture of electro-magnetic products and parts	A4	3 years	
2.11 Manufacture of parts, peripheral devices and signal cables	A2, A3, A4, B	0-8 years	CIT exempt period depend on activity details. Some activities must have production process as approved by the Board
2.12 Manufacture of parts or equipment for solar-powered products	A2	8 years	Project must have production process and product must have energy yield as approved by the Board
2.13 Manufacture of smart electrical appliances and smart electronics	A2-A3	5-8 years	CIT exempt perioddepend on capital investment. Additional conditions must be compline
2. Manufacture of electronic products, devices and parts			
2.14 Manufacture of audio-visual products and parts	A3, A4	3-5 years	CIT exempt period depend on PCBA manufactured
2.15 Manufacture of office electronics and parts	A3, A4	3-5 years	CIT exempt period depend on if whether PCBA manufacturing include in the same project
2.16 Manufacture of telecommunication devices and wireless-system devices	A3,A4	3-5 years	CIT exempt period depend on activity details. Additional conditions must be compline
2.17 Manufacture of electronic measuring instruments and parts	A3, A4	3-5 years	CIT exempt period depend on if whether PCBA manufacturing include in the same project Additional conditions must be compline
2.18 Manufacture of power supply, converter, inverter or charger	A3, A4	3-5 years	CIT exempt period depend on activity details. Addition specific conditions must be compline
2.19 Manufacture of products using microtechnology	A2	8 years	Additional conditions must be compline
2.20 Manufacture of other electronics products and parts	B	0 year	
3. Manufacture of Electrical Products, Devices and Parts			
3.1 Manufacture of electrical appliances	A4	3 years	Only Air conditioners, refrigerators, freezers, washing and drying machines and must have high energy efficiency compline with ministry of energy standard.
3.2 Manufacture of parts, connecting devices and electrical wires	A4, B	0-3 years	CIT exempt period depend on activity details. Additional conditions must be compline
3.3 Manufacture of transformers	A4	3 years	Project must have coil winding process
3.4 Manufacture of circuit breakers	A4, B	0-3 years	CIT exempt period depend on activity details. Additional conditions must be compline
3.5 Manufacture of compressors and/or motors for electrical appliance	A4	3 years	Project must have coil winding process or fabrication of stators or rotors in the project.
3.6 Manufacture of other electrical appliances, devices and part	B	0 year	

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