

Industrial Estate and Thailand Automobile Industry

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(I-EA-T)



Industrial Estates Authority of Thailand(I-EA-T)



- State Enterprise Founded in 1972
- Attached to the Ministry of Industry

- Develop and Manage Industrial Estates and I-EA-T Free Zone Throughout the Country



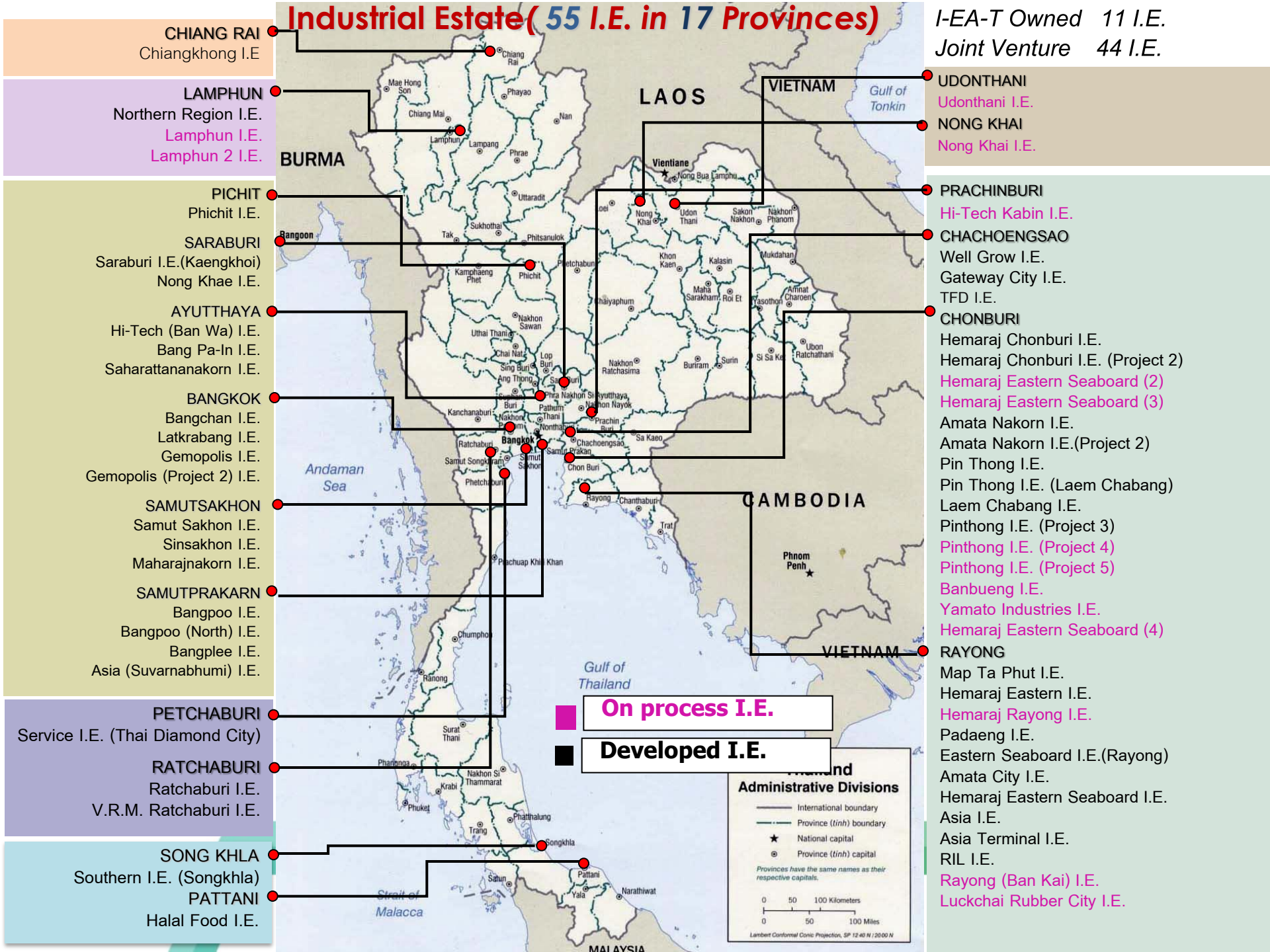
- Develop Industrial Port
- Promote and Regulate all Industrial Estate in Thailand



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Industrial Estate (55 I.E. in 17 Provinces)

I-EA-T Owned 11 I.E.
 Joint Venture 44 I.E.



Industrial Estates : Map Ta Phut Industrial Port



Public Ports

- Thai Prosperity Terminal Co., Ltd (TPT)
- Thai Tank Terminal Co., Ltd. (TTT)

Dedicated Ports

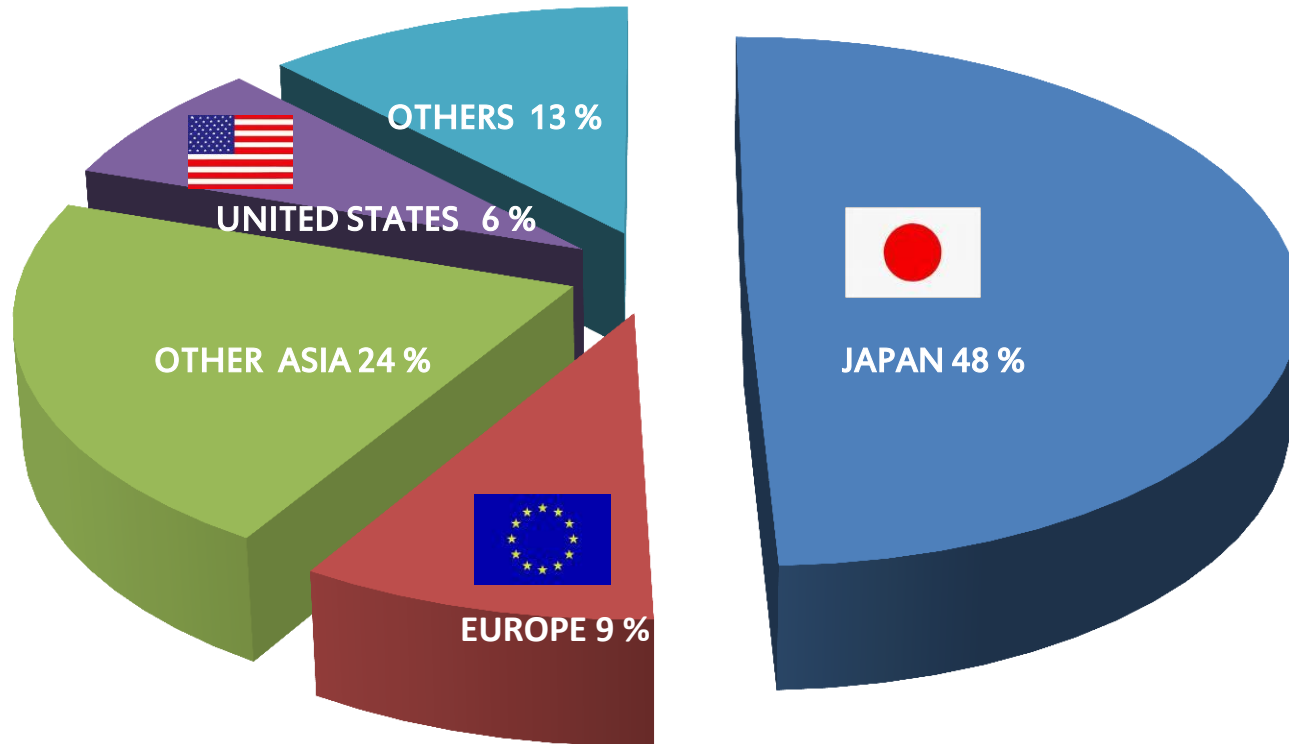
- The National Fertilizer PCL. (NFC)
- Rayong Bulk Terminal Co., Ltd. (RBT)
- Star Petroleum Refining Co., Ltd.(SPRC)
- PTT global Chemical PCL.(PTTGC)
- Glow SPP3 Co., Ltd. (GLOW)
- Maptaphut Tank Terminal Co., Ltd. (MTT)
- BLCP Power Co., Ltd. (BLCP)
- PTT LNG Co., Ltd (PTT LNG)
- PTT Tank Terminal Co., Ltd. (PTT Tank)
- Rayong Terminal Co., Ltd. (RTC)

Overall Performance in Thai Industrial Estates

Industrial Operation Land	57,871 acres	100 %
- Owned by I-EA-T	13,792 acres	24 %
- Joint Managing	44,079 acres	76 %
Available Land for Sale/Rent	5,067 acres	
- Owned by I-EA-T	956 acres	
- Joint Managing	4,110 acres	
Number of Tenants	4,335	companies
Number of Workers	574,194	persons
Investment Capitals	2,732,044	Million Baht
	88.13	Billion USD

Overall Performance in Thai Industrial Estates

Overall Investment in I-EA-T (FDI portion)



Industrial Estates : Industrial Cluster



1. Petrochemical & Oil Refinery

Southern, Hemaraj Eastern, Map Ta Phut, Padaeng, Asia, RIL



2. Automotives

Hemaraj Eastern, Eastern Seaboard, Laem Chabang, Bangplee, AmataNakhon, Amata City, Pinthong, Wellgrow, TFD



3. Electronics

Phichit, Southern, Khangkoi, Laem Chabang, Lumphun, Hi-tech, Bangpa-in, Hemaraj Eastern, Eastern Seaboard, Amata, Pinthong



4. Gems & Jewelry

Gemopolis



5. Printing & Packaging

Sinsakhon Printing City



6. Textile & Garment

Samutsakhon, Ratchaburi, Maharajnakhorn



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Industrial Estates : A Confident Investment in Thailand

2 Zones of Industrial Estates



Privileges for Investors in I.E.s

General Industrial Zone

Non-Tax Privileges:

- ❖ **Permission to own land in an industrial estate**
- ❖ **Permission to bring in foreign technicians and experts**
- ❖ **Permission for foreign technicians and experts as well as their spouses or dependents to stay in the country**
- ❖ **Permission to remit foreign currency abroad**



I-EA-T Free Zone

❖ **Non-Tax Privileges**

❖ **Tax Privileges:**

- ✓ **Exemption of import duty, Value Added Tax (VAT) and excise tax on machinery and raw materials**
- ✓ **Exemption of export duty, Value Added Tax (VAT) and excise tax on raw materials and merchandise**
- ✓ **Exemption or refund of taxes and duties on machinery and raw materials**





Types of Service Businesses



Trading



**Logistics
and supply chains**

**Conferences,
trade shows and
exhibitions**



**Repairing,
Maintaining
and
engineering
services**



**Research &
Development**



**Telecom
IT &
Entertainment
Media
Services**



Health and medical care



Educational services



**Other
related
service
businesses**

I-EA-T

Industrial estates : a confident investment in thailand

Total Solution Center (TSC)

- **One Place for**
 - Land use
 - Construction permit
 - Permit and licensing
 - Visa / Working permit
 - Import / Export tax exemption



Focal point services for the new coming customers
Training services for customers in Industrial Estates
Permit hot-line : e-Paperless, e-Permission , and e-Privilege
Mobile unit and Mobile services
Factory database : *www: ieatsolution.com*



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AUTOMOBILE INDUSTRY IN THAILAND

The automobile industry shares a sizable 10% of GDP

Thailand is the 9th largest automobile producer in the world. More than 500,000 jobs are created.

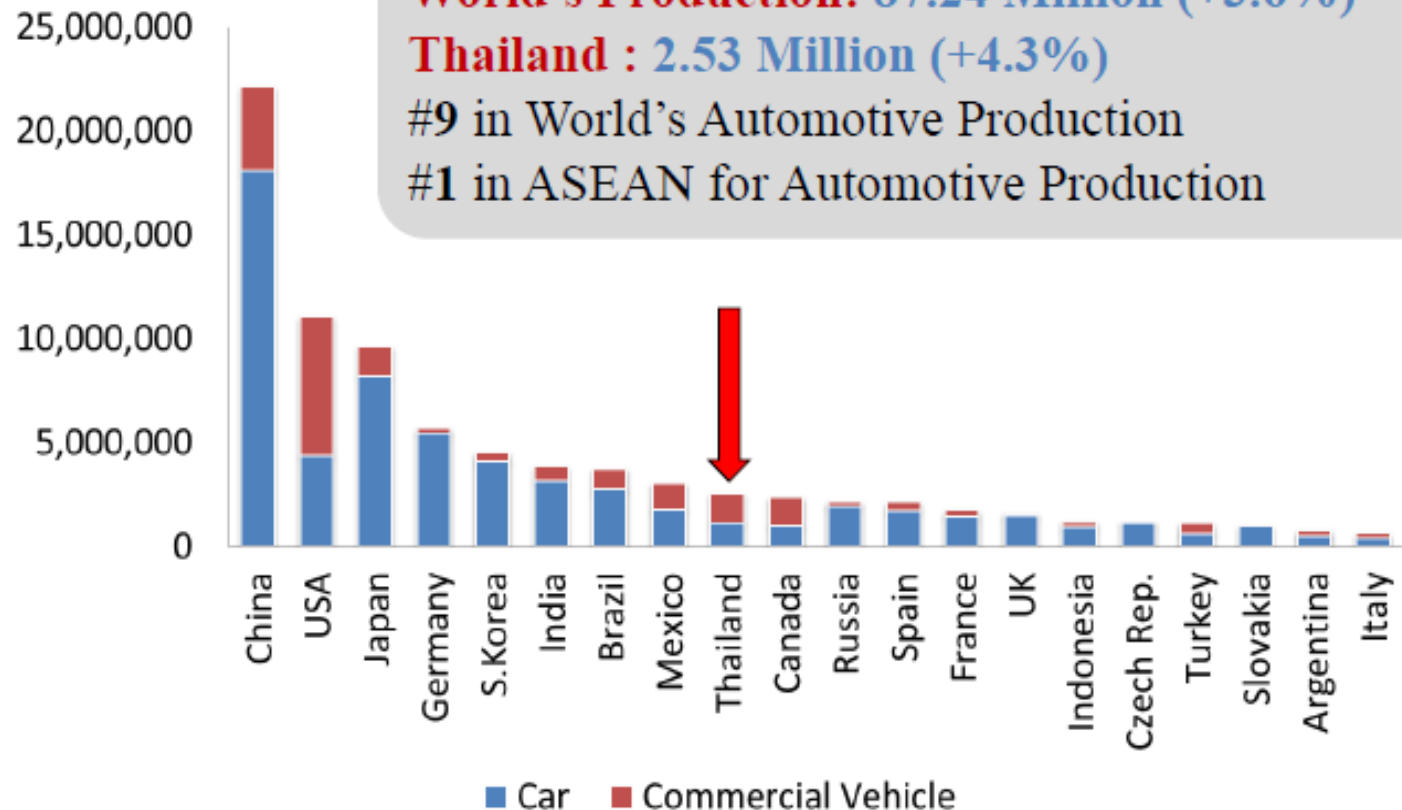
It is the largest export industry in Thailand. About 10% of all export values.

Thailand is one of the world's main exporters of cars and motorcycles.



World's Automotive Production 2013

(Units of production)



Source: OICA as of Mars, 2014



AUTOMOBILE INDUSTRY IN

ASEAN



Vietnam

- Population : 87 Million
- Production 2013 : 93,630 Units
- Sales 2013 : 98,649 Units
- Product Champion : Motorcycle



Philippines

- Population : 92 Million
- Production 2013 : 79,169 Units
- Sales 2013: 181,738 Units



Thailand

- Population : 67 Million
- Production 2013 : 2,457,057 Units
- Sales 2013 : 1,330,672 Units
- Product Champion : 1-ton Pick up & Eco-Car



Malaysia

- Population : 28 Million
- Production 2013 : 601,407 Units
- Sales 2013 : 655,793 Units
- Product Champion : Passenger Car



Indonesia

- Population : 240 Million
- Production 2013 : 1,208,211 Units
- Sales 2013 : 1,229,901 Units
- Product Champion : SUV and MPV, Big Truck

ASEAN Key Indicators 2013	
Population	616 million
GDP	•2.5 trillion (US\$)
GDP	*Growth rate : 5.2%
Car Production	*4,439,474 units
Car Total Sales	•3,549,506 units

Source: ASEAN Automotive Federation



Almost all global auto players are already in ASEAN



NISSAN

HONDA



HYUNDAI



MAZDA

ISUZU



HINO



CHEVROLET



TATA



SCANIA



Great Wall



CHERY



Potential Structure of Thai Automotive Industry

Automobile & Motorcycle

Automobile 18 companies
 Motorcycle 8 companies
 100,000 workers

Foreign
J/V

1st Tier

Foreign Majority 47 %	Thai Majority 30 %	Pure Thai 23 %
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648 companies
 250,000 workers

**All Inclusive
 Supporting
 Industries**

2nd and 3rd Tier

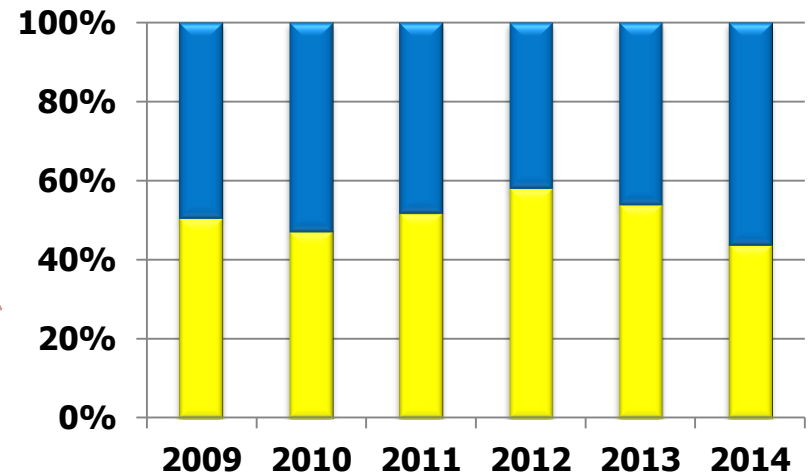
1,700 companies
 340,000 workers

Source: Thailand
 Automotive Institute

High Local Content

Type	Local Content
Motorcycle	90-95%
Pick-up Truck	70-80%
Passenger Car	30-70%

Export 60% Production



Thailand is the center of ASEAN automotive assemblers.

Automobile Manufacturers*
(Body + Engine + Parts)

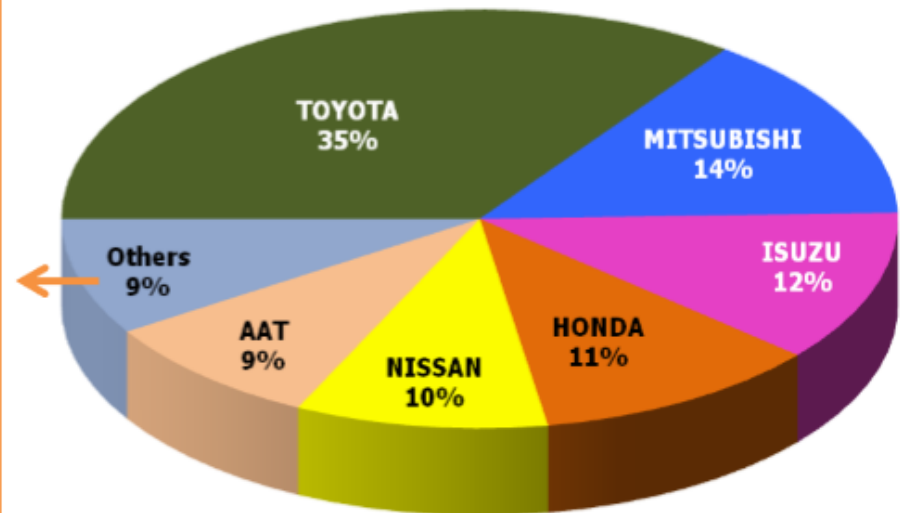
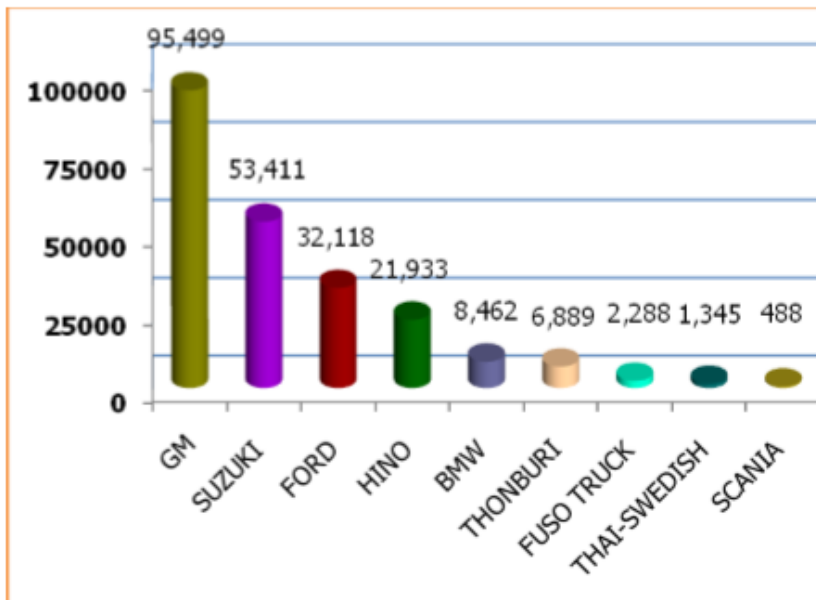
Motorcycle Manufacturers*
(Body + Engine + Parts)

Assemblers

SKD_ers

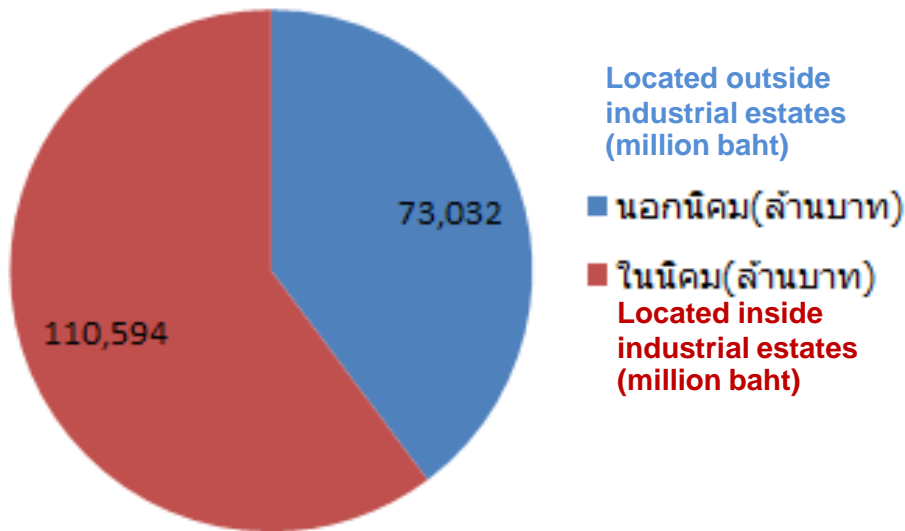
AUTOMOBILE INDUSTRY IN

Main players in Thailand

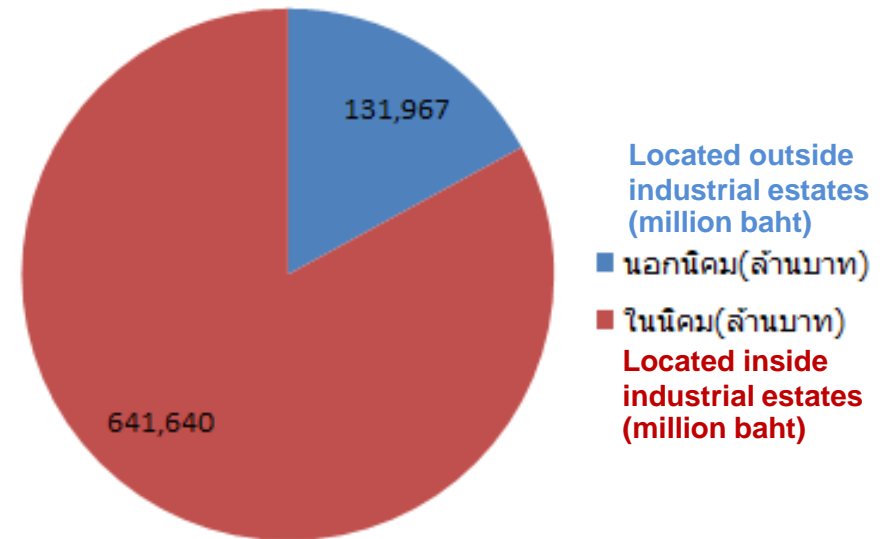


AUTOMOBILE INDUSTRY IN THAILAND

Assembly Business



Automotive parts Business



AUTOMOBILE INDUSTRY IN THAILAND

What I-EAT plans to do next?

Cluster	Target Products	Target Investors	Target Areas
Automobile and Parts	<ul style="list-style-type: none">-Engines-Safety devices and parts-Parts of Hybrid cars and EV-Fuel system-Power Train and Transmission system	<ul style="list-style-type: none">-North America-East Asia (Japan, Korea, Taiwan, China)-EU	<p>Industrial Estates located in Eastern Seaboard Areas :</p> <ul style="list-style-type: none">-Chacheong Sao-Chonburi-Rayong <p>For example Amata, Hemaraj, Pinthong etc.</p>



Major Industrial Estates in Eastern Provinces(Chachoengsao, Chonburi and Rayong)





Thank You !

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