

AUTOMOTIVE INTELLIGENCE FOR PROFESSIONALS



Thailand AutoBook 2019



PREVIEW



**Thailand
AutoBook
2019**



WELCOME!

The Kingdom of Thailand is ASEAN's Automotive Hub – a market comprising 650M people – with significant potential for growth in both domestic and export markets.

8 Japanese and 2 US OEMs have already set up in Thailand for both domestic and export production. Cars made in Thailand are delivered to more than 100 countries.

The period between 2012 and 2013 were considered Thailand Automotive's 'Golden Years' with 2.5M vehicles produced and the country joining the Top 10 automotive manufacturing countries worldwide.

In 2013, Thailand was ranked at number 9 showing the potential and capacity of the country. However, in 2014 and 2015 the industry has contracted back to approximately 2M units and our forecast for 2018 stands again at about 2M vehicles.

Thailand now ranks in the 12th position as of 2017 with Thai car manufacturing reaching a total of 1.988M units.

Domestic sales have been contracting since mid 2013 from the slowdown of the Thai economy, high household debt and the previous government's First Car Buyer's policy. However, the industry was able to offset the decrease in part by stronger export sales.

In 2017 full year vehicle sales in Thailand increased 13.4% year over year to 871,644 units. The 2017 vehicle export decreased 4.1% to 1,139,696 units.



Outsourcing, localization and business development

This book was prepared to support automotive executives:

- 1) **Business Development** – suppliers to the auto industry (auto parts producers, machines & tools, logistics, services) who seek to establish contacts for establish or increase sales of their products in Thailand.
- 2) **Outsourcing** – Purchasing executives who are looking to source automotive components from Thailand.
- 3) **Localization** – international managers desiring to expand their market and set up a footprint for distribution or local production.

Focus on contacts

This update introduces new quick links to access web sites, Google Maps locations and social media sites of the featured companies and their representatives. Simply click on the following icons to connect:



I am sure this book will give you lots of information and inspire you to expand your business in Thailand.

To your success!



Uli Kaiser

Chapter 1

Introduction



Introduction

AT A GLANCE

1. Thailand is the Automotive Hub of ASEAN with 2 Million cars produced in 2017
2. About 50% of the manufactured vehicles are exported
3. About 50% of the manufactured vehicles are Pickup Trucks
4. OEM's are from Japan and the USA supported by virtually all MNCs and a Thai Automotive Cluster of components suppliers.
5. 85% of the market share is controlled by Japanese, about 15% by US OEMs

Thailand's Automotive Industry

Thailand's Automotive Industry offers a wealth of opportunities for local and international sales and sourcing. Incentives are offered to encourage local production of components, electronics and eco-cars and there is also demand for design, R&D and testing centers.

Over the next years, Automotive exports will grow significantly through Thailand's free-trade agreements (FTAs) with its ASEAN neighbors and many other countries such as India, China and Australia.

Many of the world's major automakers, assemblers, and parts and components manufacturers have put their footprint in Thailand, and many are planning additional investment such as Germany's Volkswagen Group and PSA from France.

Toyota, Honda, Mitsubishi, Mazda, Isuzu, Nissan, Ford, Chevrolet, BMW, Daimler all have a presence in the country with a combined capacity of more than 3 Million units per year.

The Thai automotive industry has developed into a major production center with 350,000 people generating 12% of the national GDP.



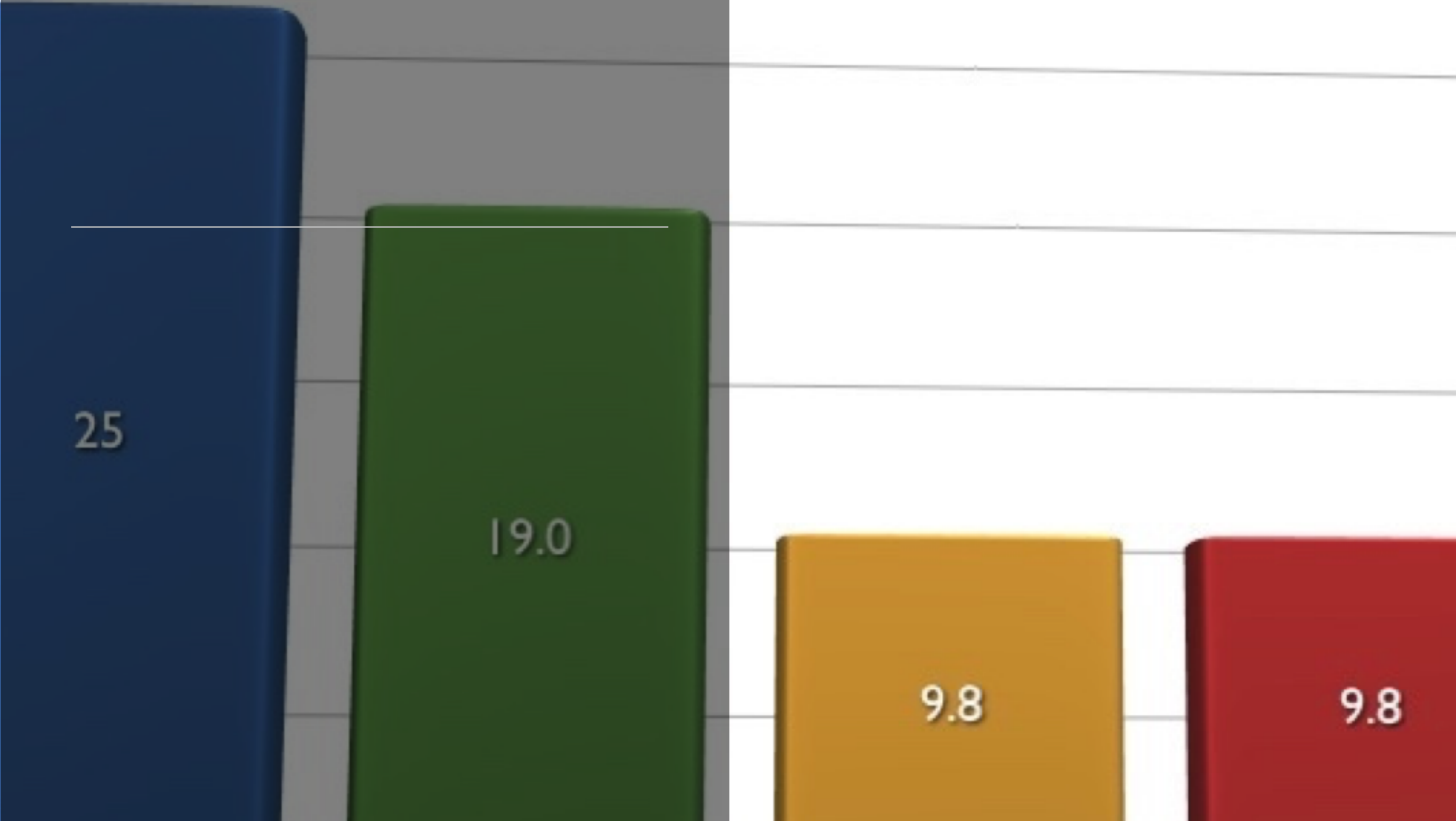
Statistics

25

19.0

9.8

9.8



Thailand Automotive Production

2018 Global Ranking



(2017 Full Year Production in
1,000 units)

29,015



OEMs



Auto Alliance

AT A GLANCE

1. Joint Venture between Ford and Mazda
2. Commenced operation in Thailand in 1999
3. The facility currently produces three major models – the Ford New Ranger, Mazda BT-50 and Ford Everest.
4. Production capacity: 295,000 vehicles/year



Auto Alliance (Thailand) Co., Ltd.
Eastern Seaboard Industrial Estate
No. 49, Moo 4, Pluakdaeng
Rayong, 21140
Tel: +66 38 95 4111

Trevor Negus
President & CEO

Kanyanat Arunvipas
Senior product engineer

Oh Karnja
Powertrain Production Part Purchasing



AutoAlliance Thailand (AAT) was established in 1995 as a joint venture between Ford Motor Company and Mazda Motor Corporation to become the center of excellence for compact pickup truck manufacturing for domestic and international export markets. It is supported by Thailand's Board of Investment.



Initial investment capital of more than US\$ 500 million was made to build the first state-of-the-art, Integrated Manufacturing Facility (IMF). Facilities include a Stamping Shop, Body Construction Shop, Paint Shop, Engine Assembly Shop, and Trim, Chassis & Final (TCF) Assembly Shop for complete vehicles, or Complete Build-up Unit (CBU). In addition to CBU products, the company also produces Complete Knock-Down (CKD) kits, which it supplies to several Ford and Mazda assembly facilities around the world.

In 2007, Ford and Mazda invested an additional US\$500 million to expand operations with a new, highly flexible passenger car plant that will utilize the same systems and processes, and state-of-the-art automotive manufacturing technologies already in place at AAT. This latest investment brought Ford and Mazda's joint-investment total in the vast AAT facility to more than US\$1.5 billion.

Adhering to international standards of quality, the Rayong based, BOI-promoted AutoAlliance facility represents Thailand's very first integrated vehicle manufacturing plant. The facility is located on a 529 rai (846,400 square meters) plot of land in the Eastern Seaboard Industrial Estate.

The company is able to perform a wide range of processes from stamping, body work, paint to engine assembly, trim & final assembly, quality inspection, packaging and delivery.



Other OEMs Vehicle Manufacturers

The full version of the Thailand AutoBook includes profiles of the following companies operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



ISUZU



Chapter 4

Thai Tier 1

Photo: AAPICO Forging, Chonburi



Thai Automotive Cluster Introduction

AT A GLANCE

1. This chapter deals with Thai or predominantly Thai owned companies.
2. The Thai Automotive Cluster consists of about 2,000 companies which are either 100% or partly Thai owned.
3. More than 50% of production is exported as Thailand is the export base for foreign assemblers for the ASEAN region.
4. Japanese, European, US and Asian Suppliers are featured in separate chapters.

The automotive cluster has been the priority sector for the economy of Thailand. It is the third largest sector contributing 12% of the GDP. The cluster contributes massively to international export and trade inflows.

The automotive industry in Thailand has for several decades been a priority sector, and for many years it has been supported and encouraged by the government. Today the automotive industry is the third largest industry in Thailand (\$28.34 Bn or 12% of GDP), employing a workforce of more than 300,000 employees. Thailand produced about 2,100,000 vehicles in 2014, a 200% growth since 2005.



Structure of Thai Automotive Industry

Assembler

(14 car makers, 7 motorcycle makers)
100,000 workers

Foreign
J/V

LSEs
Large Scale
Enterprises

Tier 1

(Total 690 companies)
250,000 workers

Foreign
Majority
54 %

Thai
Majority
23 %

Pure
Thai
23 %

Tier 2, 3

(1,700 companies)
175,000 workers

Local
Suppliers

SMEs
Small & Medium
Enterprises

Source: Thai Autoparts Manufacturers Association

Section 2

PCS Group Holding

AT A GLANCE

1. Thai owned Automotive parts maker.
2. Commenced operation in Thailand in 1977



PCS Machine Group Holding

2/8 Moo 3 Kokgroad, Muang,
Nakhon-Rachasima
Tel: +6644 701 300

Techapit Ampaipant

Email: techapit.a@pcsholding.com
Tel: +6644 291 731-(2)



PCS and SW & Sons and group of companies are major part manufacturers for the automotive, motorcycle, electrical appliance and agricultural engine industries.



PCS Machine Group Holding (PCSGH) has been making first-tier auto-parts for more than a decade. Its production is concentrated in:

- The Powertrain System, High Value Component Parts for Engines, Transmissions and Final Drives.

PCSGH works on an ongoing basis to update and upgrade its production processes and technology, especially with regard to:

- Hot Forging and Die-Casting, in order to be able to make lighter, stronger vehicle parts.

Its production quality already complies with European VI emission standards (Euro VI) for diesel commercial vehicles, which puts the firm ahead of most auto-parts makers in the region and enables it to supply components for the manufacture of automobiles for export to the EU and other jurisdictions with strict standards.

Its customers consist of:

- Isuzu, Toyota, AAT, Mitsubishi, Nissan, GM, Delphi, Continental, and Hitachi Automotive.

PCS Machine Group Holding Plc expects its revenue to increase by 5% in 2016 on an assumption that Thailand will be able to produce around 1.95 million units this year where economic recovery, consumers' confidence, high house hold debts and crops prices are factors that could affect the industry in 2016.

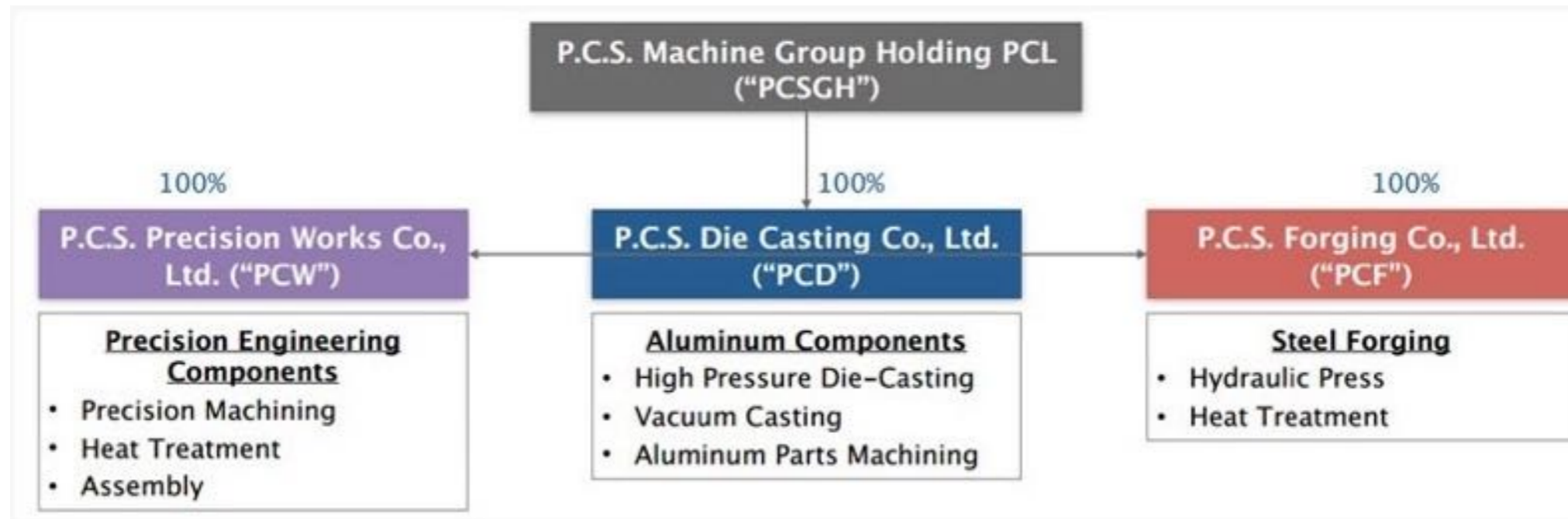


PCS's revenue target does not include opportunity for order from large car companies such as Mazda, Ford, Toyota, Mitsubishi, and Nissan which all have received license for eco-car phase II while the company revenue was around Bt4.1 billion in 2016 which similar to 2015.

The company has set aside around Bt200-300 to invest in 2016 and they are planning to spend around Bt577 million that they have in cash to improve their production process and to fund its 5 megawatts solar roof project which expected to save them around Bt30 million per year in production cost.

Gallery 4.1 P.C.S. Machine – Impressions





Thai Automotive Suppliers

The full version of the Thailand AutoBook includes profiles of the following companies operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



Chapter 5

Japanese Tier 1



Aisin Takaoka Thailand Group

AT A GLANCE

1. Commenced operation in 1977
2. Machined engine and chassis components, casting and forged



ATTG Head Office

Amata Nakorn Industrial Estate
 700/89 Moo 1, Bangkao
 Panthong, Chonburi, 20160
 Tel: +66 38 454 671
 Email: sales@attg.co.th

Narissa Sillapapibool

Executive General Manager

Kittiphol Nandhawongse

Sales Manager

Nakarin Charoenkitmaneerat

Sales and Marketing Manager



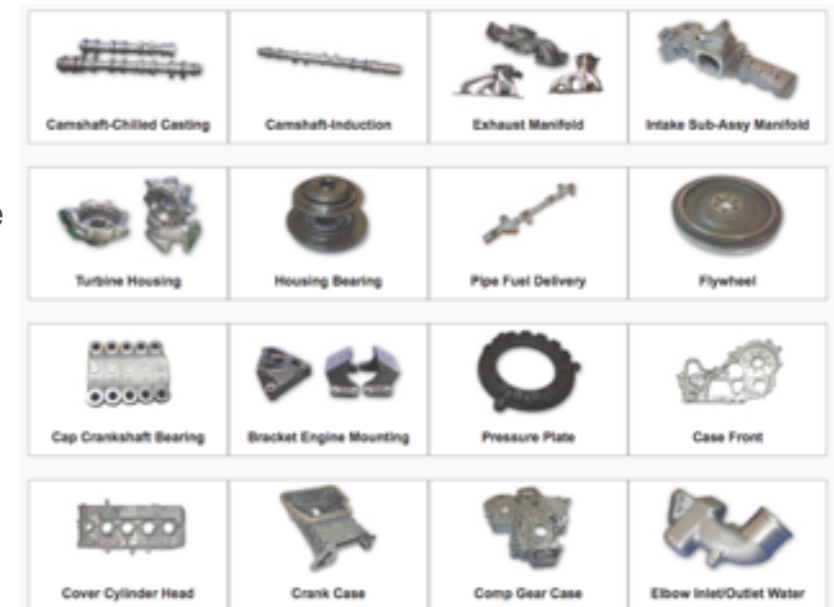
Aisin Takaoka Thailand Group (ATTG) and group is the leading company of Iron and Aluminum business in Thailand and it is part of the Aisin Takaoka Group and the group consists of six companies which produces engine, transmission and chassis components.



ATTG is responsible for Sales, Marketing, Business Planning & Development and Production Control Function of the group companies. The group consists of 6 companies and is part of the Aisin Group and produces engine, transmission and chassis components.

Their products include:

- Drivetrain such as Carrier Sub Ass'y Fr Differential, Carrier Sub Ass'y Rr Differential, Tube Ass'y Differential, Case Differential, and Retainer Bearing etc.
- Break and Chassis such as Knuckle, Disc Brake, Drum Brake, Caliper Body & Bracket, Body Wheel Brake Cylinder, Bracket Caliper Support, and Gear Box.
- Body Parts such as Reinforce Bumper, Pillar, Reinforce Roof, and Door Impact Beam.
- Engine Parts such as Camshaft-Chilled Casting, Camshaft-Induction, Exhaust Manifold, Intake Sub-Assy Manifold, Turbine Housing, Housing Bearing and Pipe Fuel Delivery etc.



Japanese Automotive Suppliers in Thailand

The full version of the Thailand AutoBook includes profiles of the following companies operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



North American Tier 1



Section 1

Adient

AT A GLANCE

1. Established: 1960
2. Employs: 75,000
3. Turnover: 20 Billion USD



Adient is the global leader in the \$60 billion automotive seating and interiors market, with approximately 75,000 employees in 230 locations across 33 countries. The company is a spin off from Johnson cControls



With \$20 billion in consolidated annual revenues, Adient delivers 25 million seating systems used on more than 360 vehicle nameplates around the globe. The seating division designs and manufactures automotive seats and supplies them on a just-in-time schedule.

It also designs and manufactures seating components, including mechanisms, tracks, structures foams, fabrics and trim. Brands produced under this business unit include RECARO automotive seats and Keiper.

Product range:

- Interiors
- Seating

Click [here](#) for global Adient locations.

Adient Chonburi

150/11 Moo 9, Tambon, Nongkham
Ampoo Sriracha, Chonburi
Tel: +1 414 220 8900



Somsak Polsoda

Regional Manufacturing Manager



Setthasak Potchana

Plant Manager



North American Automotive Suppliers in Thailand

The full version of the Thailand AutoBook includes profiles of the following companies operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



Chapter 7

European Tier 1



Section 1

GKN Driveline

AT A GLANCE

1. UK owned Automotive Tier 1
2. Driveline components (CV Joints)



GKN Driveline (Thailand) Co., Ltd.

Eastern Seaboard Industrial Estate
64/9 Moo 4, Pluakdaeng
Rayong 21140
Tel: +6638 954 965

Yasuhiro Naoi

Plant Director

Charinthip Sae-Eia

Senior Sales and Marketing Executive

Duen Wipawadee

Purchasing Officer



GKN Driveline Thailand is a subsidiary of GKN Driveline in Thailand and GKN Driveline is the world's leading manufacturer of automotive driveline components with headquarters in England.



The company has 22,000 people at 56 facilities in 22 countries working in partnership with vehicle manufacturers to develop driveshaft and geared component technologies.

GKN Driveline Thailand is a BOI promoted company and has been manufacturing CVJ Driveshafts and components since 1998. The company manufacturing facilities are located on the Eastern Seaboard Industrial Estate which produces a wide variety of CVJ components and Driveshaft assemblies.

Principle customers of the company includes Toyota, Nissan, GM, Mitsubishi and Auto Alliance and their components are exported to the USA, Australia, and ASEAN.

GKN Driveline Rayong's AWD plant manufacture key AWD driveline technology including:

- Front and Rear Final Drive units (FDU), Electronic Differential Locking (EDL) Systems for Transaxle Systems.

The company revealed that demand for AWD vehicles has been rising rapidly in the Asia-Pacific region where independent forecasts suggest that AWD production from countries in the region will account for approximately a third of global AWD output by 2020.



European Automotive Suppliers in Thailand

The full version of the Thailand AutoBook includes profiles of the following companies operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



Chapter 8

Asian Tier 1

FUTURiS

Section 1

Futuris

AT A GLANCE

1. Australian Automotive interior products maker



Futuris Automotive (Thailand) Co., Ltd.
Hemaraj Eastern Seaboard Industrial Estate
107/8 Moo 4, Pluakdaeng,
Rayong 21140
Tel: +66-33-658-900

Peter Fagan
General Manager

Papakorn Baobuangern
Engineering Coordinator

Prawatt Ogun
Seating Commodity Buyer



Futuris Automotive Thailand is part of Futuris Group, a global leader in automotive interior design and solutions, currently has a factory (7,752 square meters) in Hemaraj Eastern Seaboard Industrial Estate.

FUTURIS

Futuris is owned by Australia's Elders Limited, with manufacturing facilities in China, Asia-Pacific, North America and South Africa. Operating on a 10-rai piece of land, the Thai factory produce:

- Automotive Seating and Interior Products for both the Thailand market and for export. At present, Futuris globally supplies automotive interior solutions to world's top carmakers including General Motors, Ford, Toyota, Chery and JAC.

Futuris Group designs, engineers and manufactures automotive seating and interior systems in emerging markets, along with niche, high value-added products in developed markets. From a design and engineering base in Australia, Futuris has successfully grown into the emerging markets of China, Thailand and South Africa with further growth planned in Asia Pacific and the Americas. Futuris' major customers include GM Holden, Toyota, Ford, Mitsubishi and Mercedes, as well as Chery and JAC in China.

The local branch in Thailand of Futuris began in 2011 to service Ford, AAT and GM. Now the Rayong factory exports to seven countries and has a workforce of 900, with 550 members of staff involved in the "cut and sew" alone, though the frames have mainly a robotic assembly.



Asian Automotive Suppliers in Thailand

The full version of the Thailand AutoBook includes profiles of the following companies operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



Chapter 9

Organizations



Section 1

BOI

AT A GLANCE

1. The BOI operates under the Ministry of Industry and is the principal government agency for encouraging investment.
2. Click [here](#) to go to the web site.

Thailand Board of Investment

555 Vibhavadi-Rangsit Rd., Chatuchak,
Bangkok 10900, Thailand
Tel: +662 553 8111
Email: head@boi.go.th



Sirin Boonsaner

Investment Promotion Officer
Email: sirin@boi.go.th



If you wish to set up an operation in Thailand, please contact the Office of the Board of Investment (BOI), which operates under the Ministry of Industry and is the principal government agency for encouraging investment.

- The BOI is available to assist clients by:
- Investment Facilitation.
- Package of tax incentives.
- No foreign equity restrictions on manufacturing activities and on some services
- Assistance in the provision of visas and work permits to facilitate entry and subsequent operation for a foreign-owned business.
- Waives restrictions on land ownership by foreign entities.
- Business Support Provides comprehensive information and advice on establishing operations in Thailand:
- Arranges site visits.
- Identifies potential suppliers, subcontractors, joint-venture partners.
- Provides useful contacts with key public and private organizations.
- Coordinates between the foreign business community and other public agencies

The BOI also acts as Thailand's marketing arm and actively promotes the country worldwide as one of the best investment locations in Asia.

The BOI is tasked with devising and implementing strategies under which promotional activities are organized around the globe throughout the year.

The BOI's 13 overseas offices (Tokyo, Osaka, Shanghai, Beijing, Guangzhou, Seoul, Taipei, Sydney, Frankfurt, Paris, Stockholm, Los Angeles and New York) serve as Thailand's front desks in liaising with potential investors.

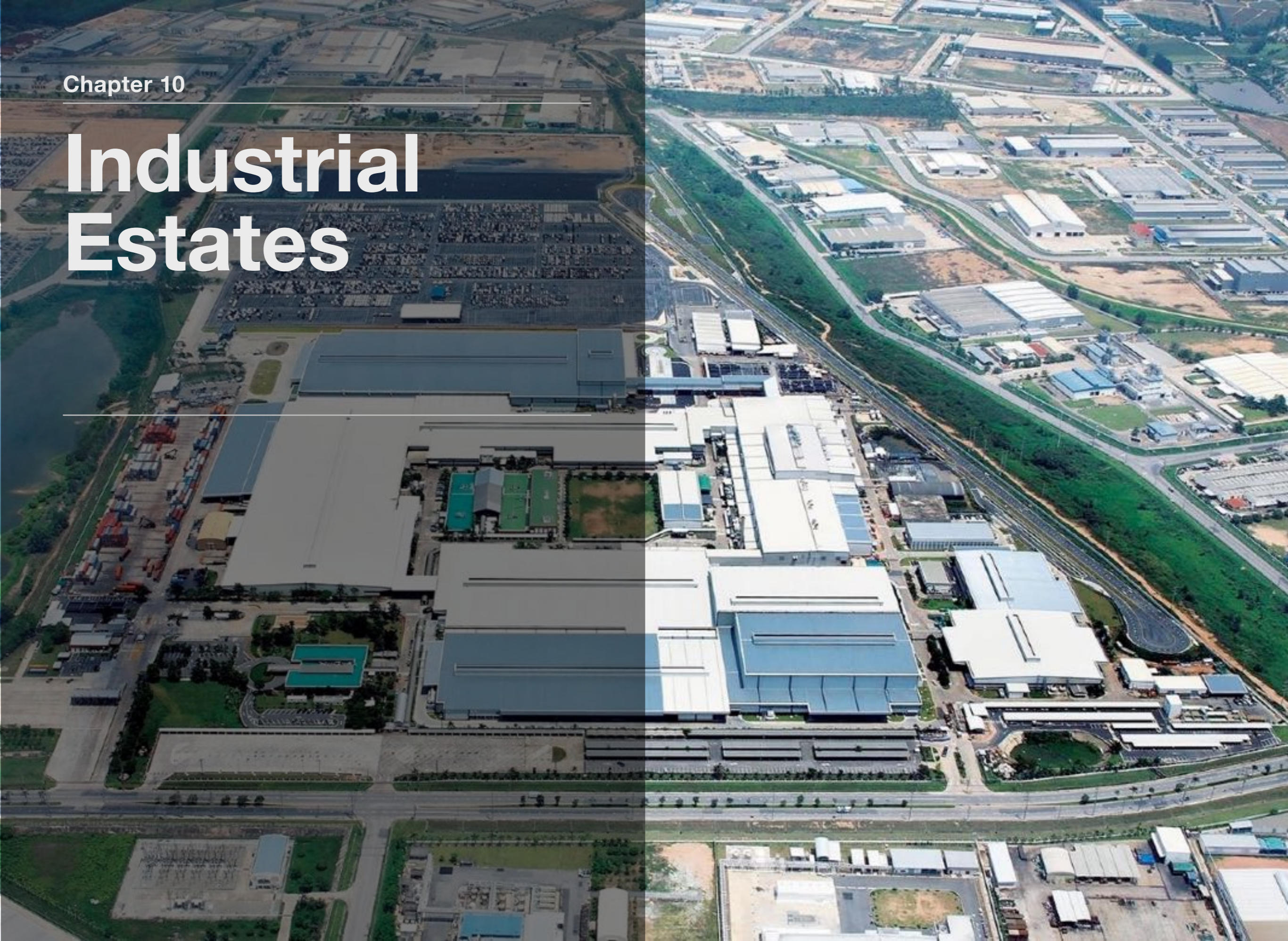


Thai Automotive Organizations

The full version of the Thailand AutoBook includes profiles of the following organizations operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



Industrial Estates



Section 1

Hemaraj Land and Development

AT A GLANCE

1. Operates 6 Industrial Estates in Thailand.
2. Click [here](#) for a video introduction



Hemaraj Land And Development PCL

18th Floor, UM Tower,
9 Ramkhamhaeng Road, Suanluang
Bangkok 102510
+662 719 9555

Siyaphas Chantachairoj
siyaphasc@hemaraj.com



Hemaraj Land And Development Public Company Limited is Thailand's leading developer of Industrial Estates, Utilities, Power, and Property Solutions.

Hemaraj's industrial estates offer world-class products and services to discerning manufacturing customers from all over the world. Hemaraj have achieved ISO 9001:2000, ISO 14001 and Best Environmental Management EIA awards from the Ministry of Sciences Technology and Environment.

Multinational companies have selected Hemaraj's industrial estates as the strategic location for their investments in Thailand. Hemaraj's industrial estates offer developed industrial land, utilities, ready built factories for rent, quality industrial services, and integrated logistics and supply chain and warehouses for rent.

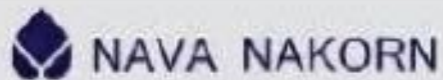
Hemaraj develops and operates eight industrial estates, located mostly on the Eastern Seaboard of Thailand, covering 45,203 rai or 18,081 acres. Our 656 distinct customers including 228 automotive customers with 988 land or factory contracts have invested more than US\$26 billion.

Hemaraj employs over 120,000 people, thus contributing directly to the industrial strength of Thailand.



Industrial Parks in Thailand

The full version of the Thailand AutoBook includes profiles of the following industrial estates operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



Events



Section 1

Thailand Autoparts & Accessories

AT A GLANCE

1. Date: April, 5-8 2018
2. Venue: BITEC, Bang Na
3. ASEAN Auto Parts Sourcing Hub
4. Co-organizer: Thai Auto-Parts Manufacturers Association (TAPMA)



Organizer:
Department of Export Promotion
Office of Trade Fair Activities
Industrial Trade Fair Division
44/100 Nonthaburi 1 Road
Muang Nonthaburi 11000

Tel: +662 507 8374
Email: autopart@ditp.go.th



An internationally renowned fair, TAPA is an important market event for international players in the fast growing ASEAN market.



The event in 2017 will feature exhibitors from Thailand, Taiwan, India, China, Singapore, Vietnam, Malaysia, Philippine, Hong Kong and South Korea.

The last event attracted over 9,419 trade visitors from 64 countries around the world.



Other Thai Automotive Events

The full version of the Thailand AutoBook includes profiles of the following industrial estates operating in Thailand. You can order your subscription to Thailand AutoBook [here](#).



Media



Section 1

Bangkok Post

AT A GLANCE

1. English language newspaper with automotive section for consumers and business section covering industry news



**Advance Industry Media Plus Co., Ltd.
(AIM Plus)**
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Thailand

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+66 87-555-8222



The Bangkok Post is a broadsheet, English-language daily newspaper published in Bangkok, Thailand.

Bangkok Post

Automotive is covered both in the 'business section as well as in a dedicated Automotive Section which is consumer oriented. The focus is on presenting continuous coverage and information regarding new technologies in the metalworking industry, including reports and analyses industrial investment trends in relation to the current world economy.



Cushy missile

The S500 has always been a rare treat for Merc fans _ and now it's got a new heart

[View all articles in this section](#)

Next accord to evolve mildly
You mean the LED daytime running lights? Nah, we doubt it, and the same goes for the fancy rear bumper.

Sweeter Swede
The Volvo S60's position is now clearer in the Thai market

BMW M goes diesel
New tri-turbo diesel goes into four models at once: 5-series Sedan and Touring, plus X5 and X8 SUVs

Post FORUM
Resumes in February 2012

More information & register here

Other Thai Automotive Media

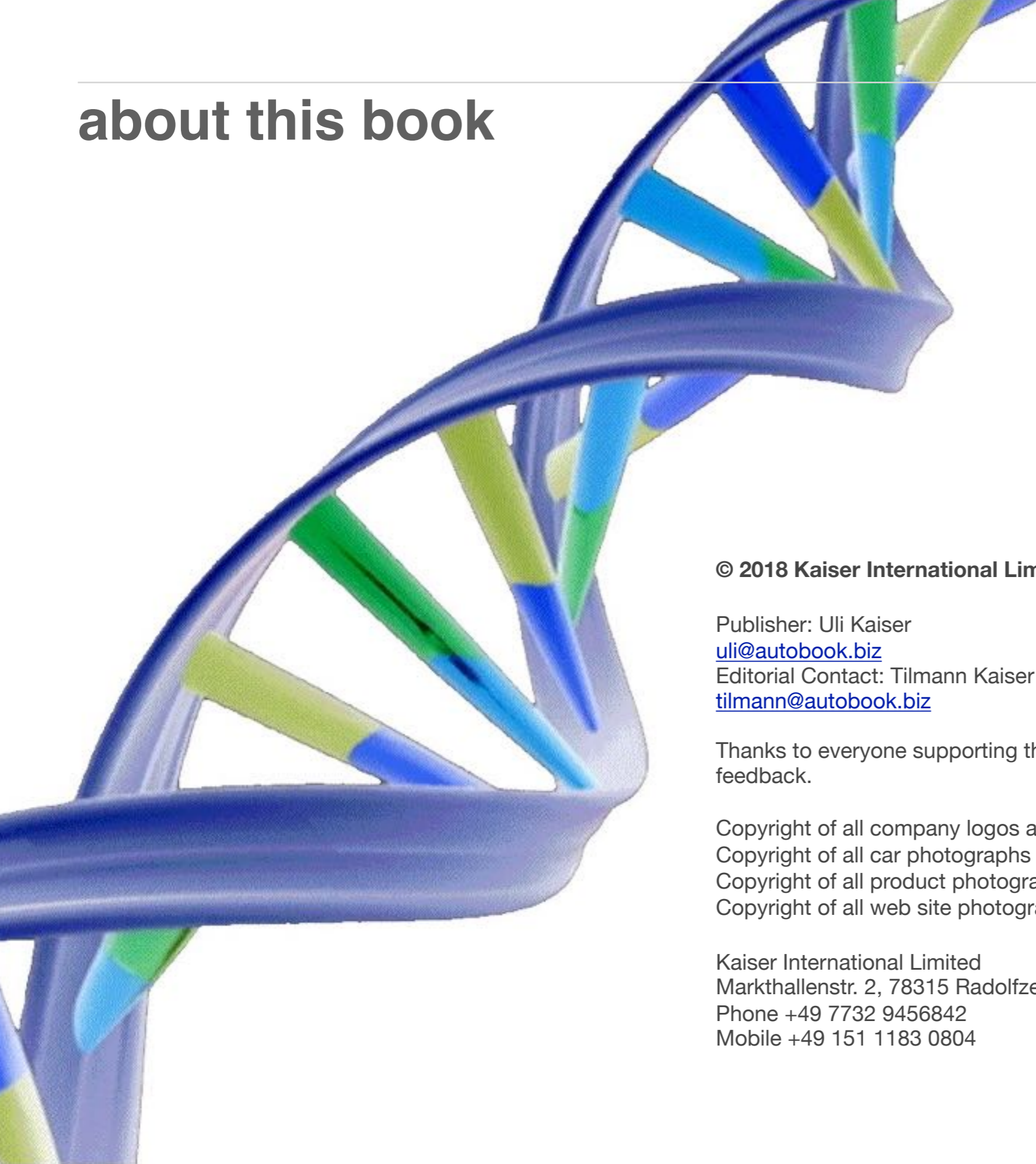
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Acknowledgements



about this book



© 2018 Kaiser International Limited

Publisher: Uli Kaiser

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