

เป้าหมายการผลิตยานยนต์ไทย ปี 2012

วัลลภ เตียศิริ

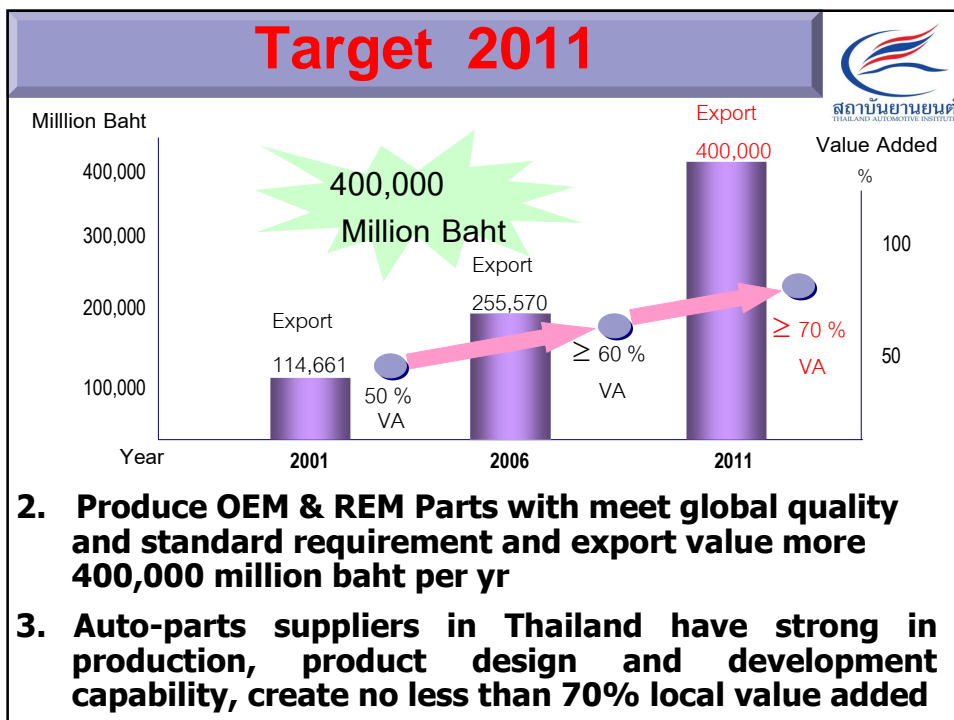
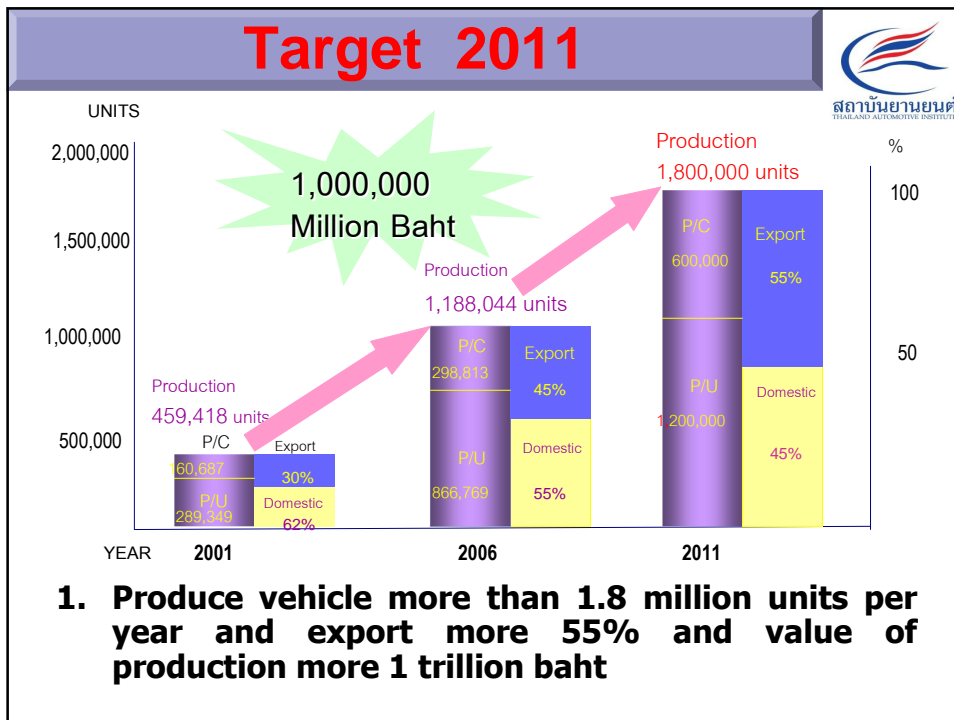
ผู้อำนวยการสถาบันยานยนต์

15 ธันวาคม 2554

วิสัยทัศน์ (Vision)

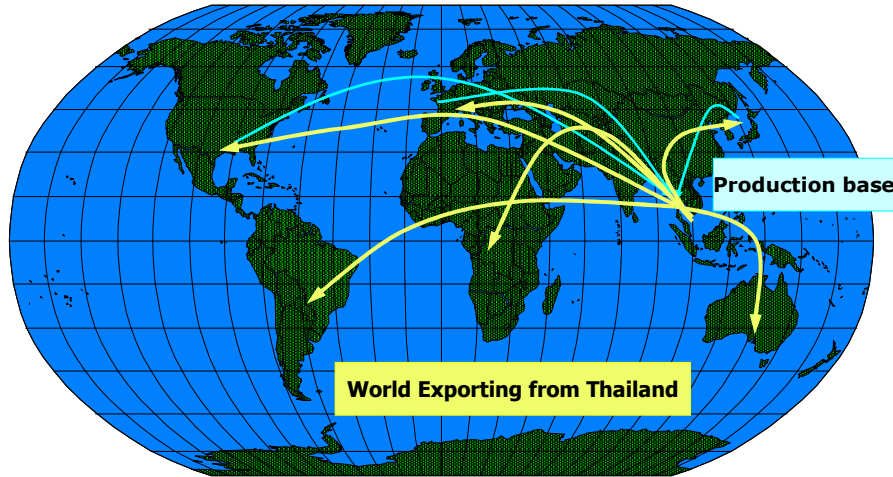
Thailand Automotive Industry Vision 2011

- Thailand is the automotive production base in Asia that adds value to the country with strong domestic supplier base

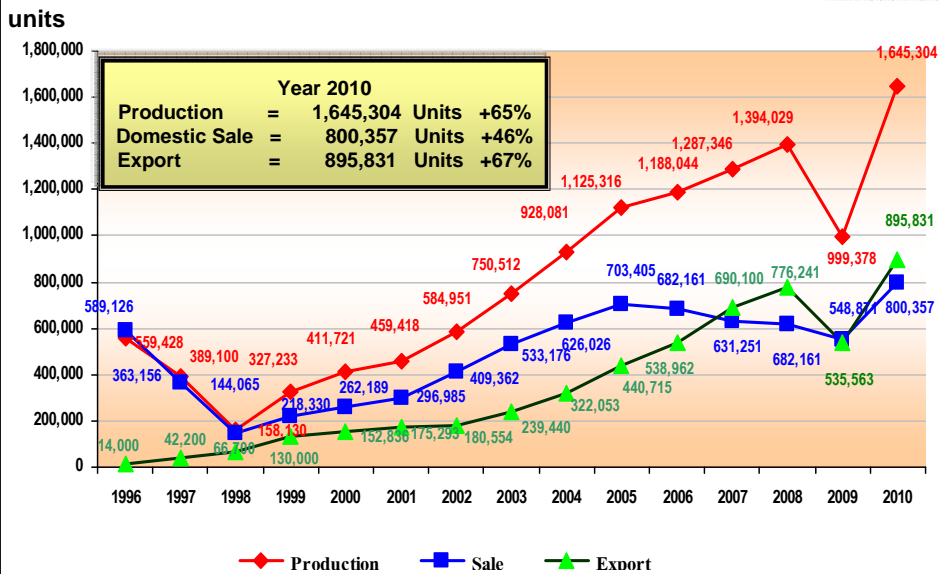


GOAL

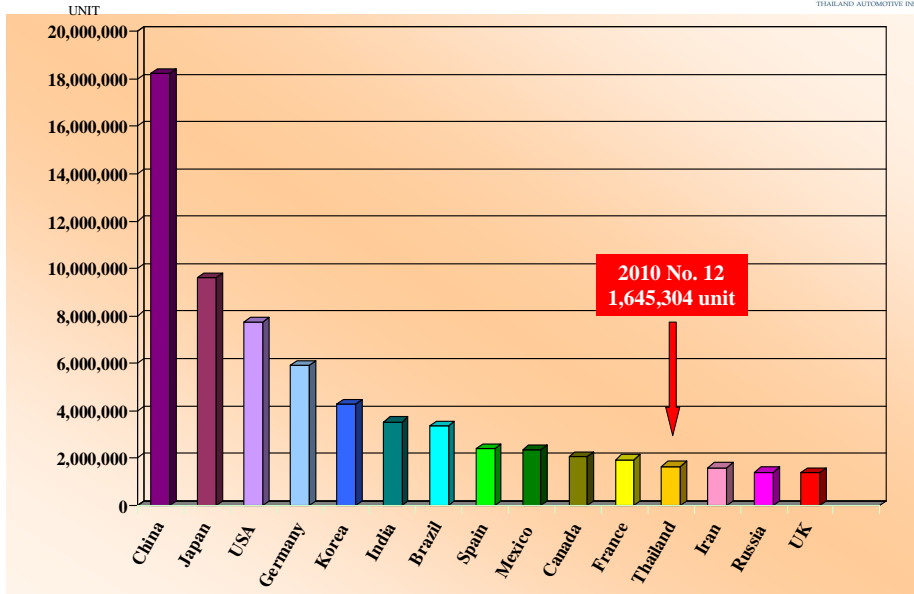
Thailand : The Automotive Hub of Asia



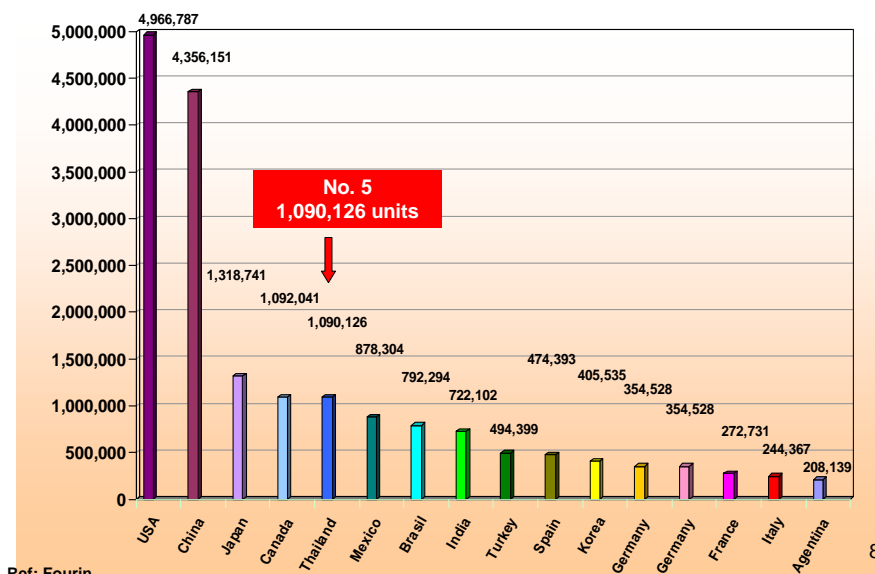
Thailand Automotive Industry Growth



Automobile Production 2010

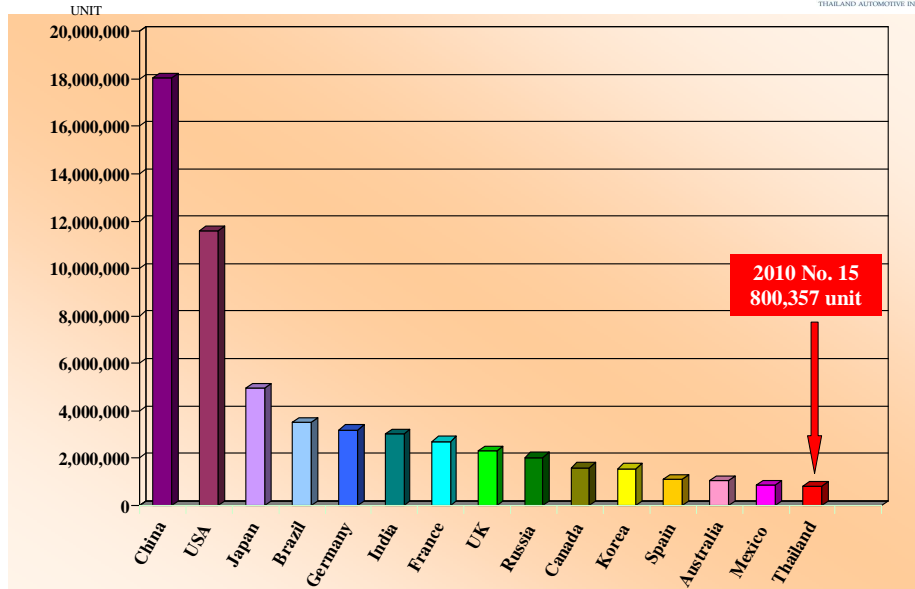


Commercial Vehicle Production 2010



Ref: Fourin

Automobile Domestic Sale 2010

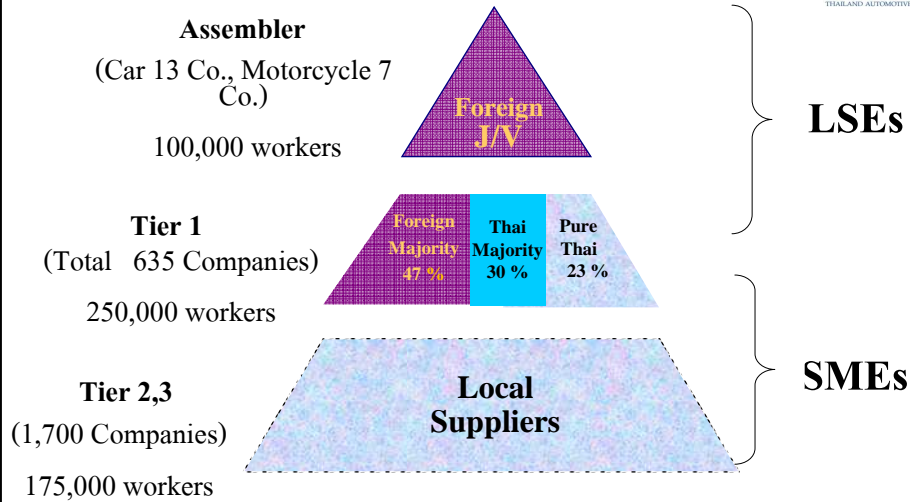


Automobile Production Capacity 2012



Factory	Passenger Car	Pick Up Truck	Others	Total
Toyota	250,000	450,000	-	700,000
Mitsubishi	200,000	250,000	-	450,000
Auto Alliance	150,000	150,000	-	300,000
Nissan	140,000	100,000	-	240,000
Honda	240,000	-	-	240,000
Isuzu	-	200,000	20,000	220,000
Ford	200,000	-	-	200,000
General Motor	40,000	120,000	-	160,000
Suzuki	135,000	-	-	135,000
Others	50,000	10,000	20,000	80,000
Total	1,405,000	1,280,000	40,000	2,725,000

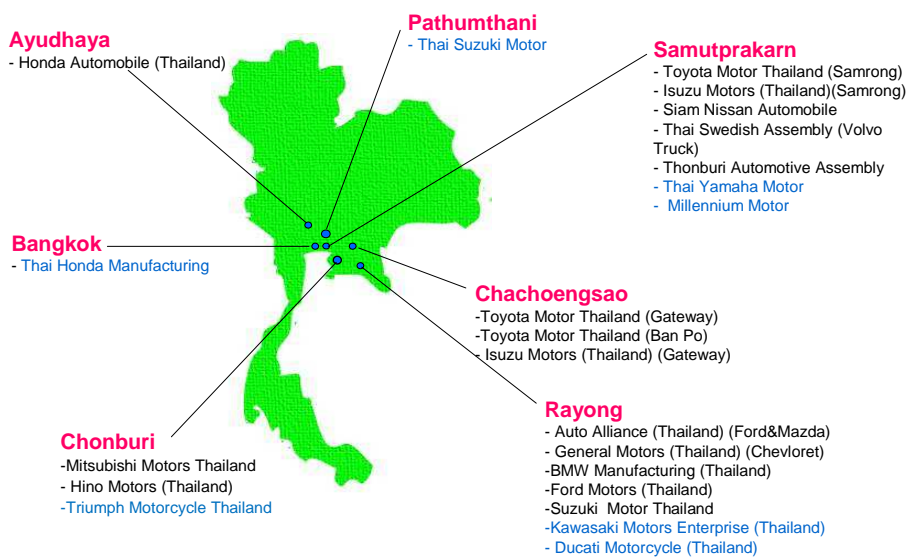
Structure of Thai Automotive Industry



[* LSEs : Large Scale Enterprises SMEs : Small & Medium Enterprises]

The data updated in July 2010 by TAI

MAPPING OF AUTO-ASSEMBLERS



Principal Auto Parts Production Sites in Thailand

Pathumthani

Total suppliers: 39

Body Parts: 18%, Engine Parts; Electrical Parts: 13% each, Suspension & Brake Parts: 10%, Drive, Transmission & Steering Parts; Accessories: 8% each, Other: 31%

Bangkok

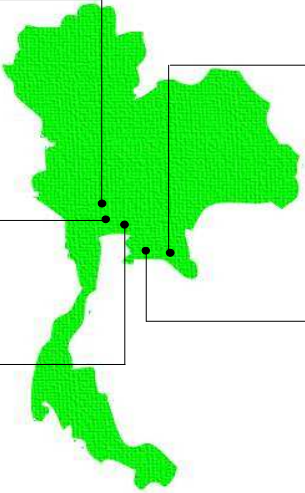
Total suppliers: 232

Body Parts: 9%, Engine Parts; Electrical Parts; Drive, Transmission & Steering Parts; Accessories: 6% each, Suspension & Brake Parts: 4%, Mold&Die: 3%, Other: 60%

Samutprakarn

Total suppliers: 158

Body Parts: 22%, Electrical Parts: 15%, Engine Parts; Drive, Transmission & Steering Parts: 8% each, Suspension & Brake Parts: 5%, Mold&Die: 4%, Accessories: 3%, Other: 36%



Rayong

Total suppliers: 41

Body Parts: 24%, Engine Parts; Drive, Transmission & Steering Parts: 15% each, Suspension & Brake Parts: 12%, Electrical Parts: 10%, Accessories: 7%, Mold&Die: 2%, Other: 15%

Chonburi

Total suppliers: 55

Body Parts: 25%, Engine Parts: 22%, Drive, Transmission & Steering Parts: 15%, Electrical Parts: 9%, Accessories: 5%, Suspension & Brake Parts: 4%, Mold&Die: 4%, Other: 16%

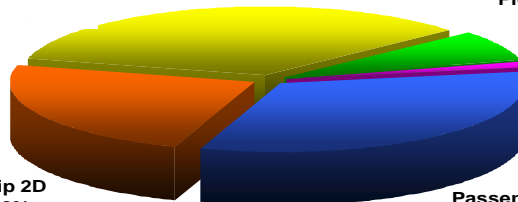
Automobile Production By Type



Pickup 4D
34.7%



Pickup 5D
7.2%



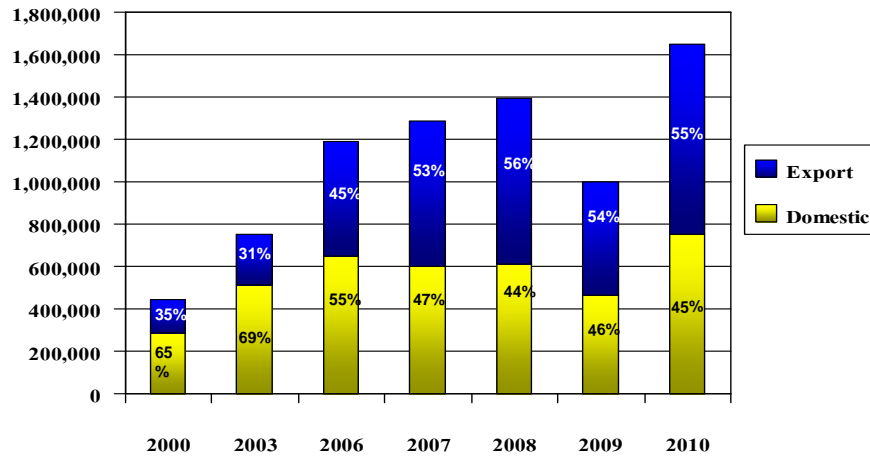
Truck & Bus
1.4%

Pickup 2D
23.6%

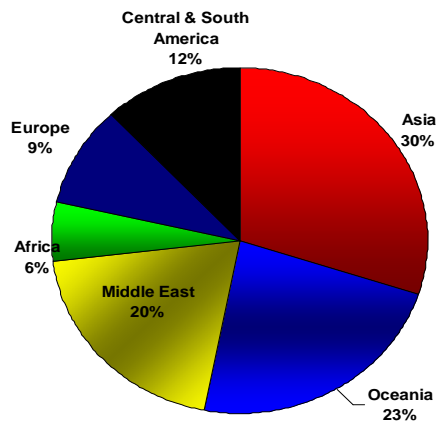
Passenger Car
34.2%



Production Ratio for Domestic & Export



Export Market Share by Region



Import-Export Value of Automotive Industry



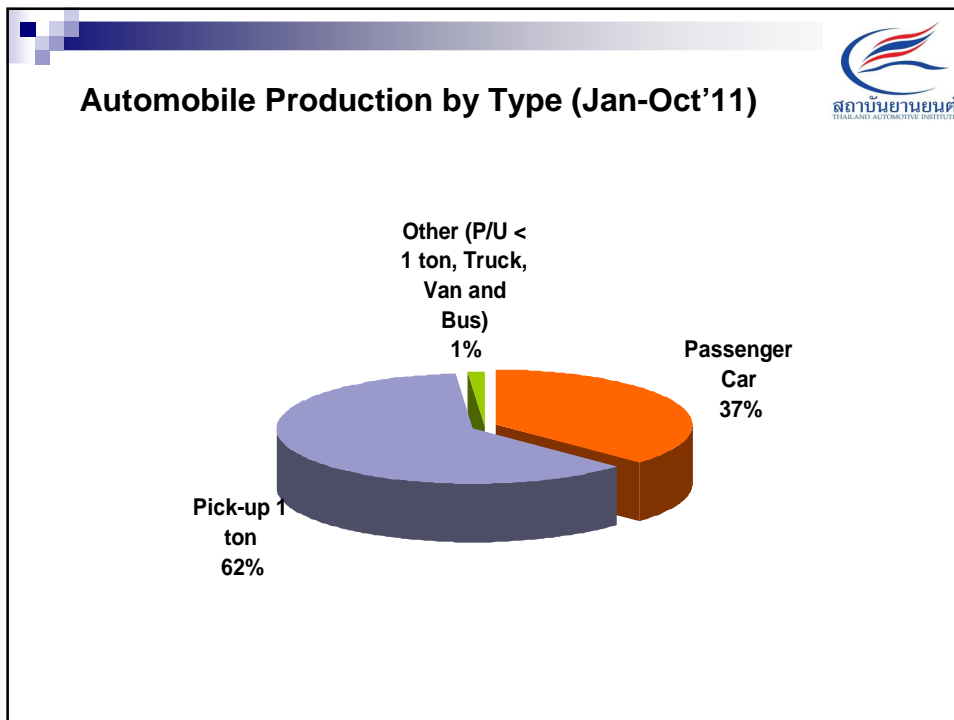
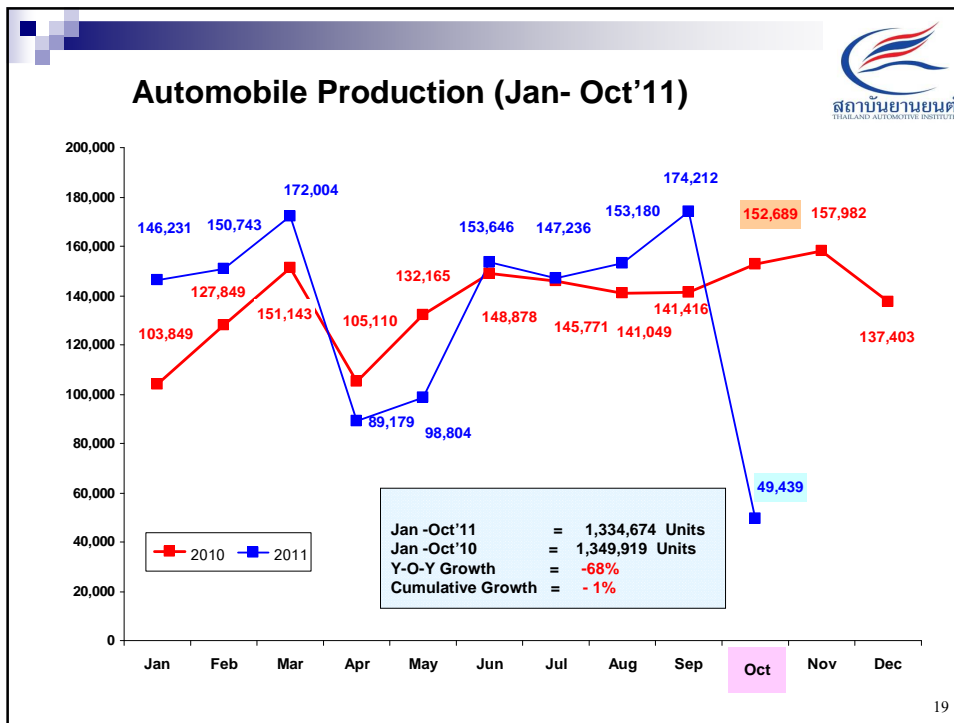
Unit : Million Baht

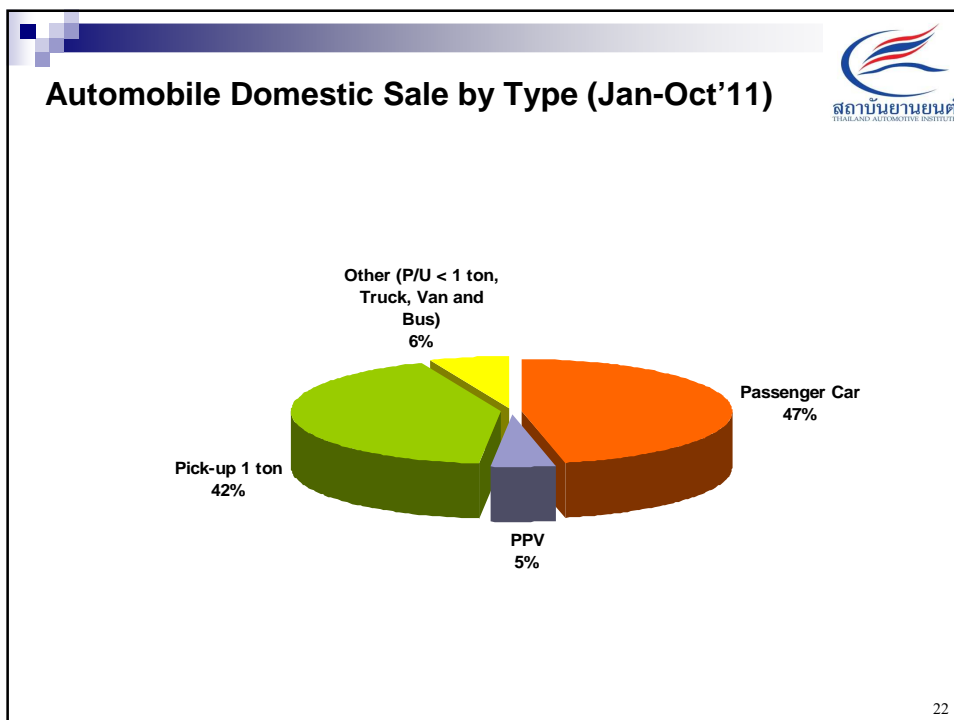
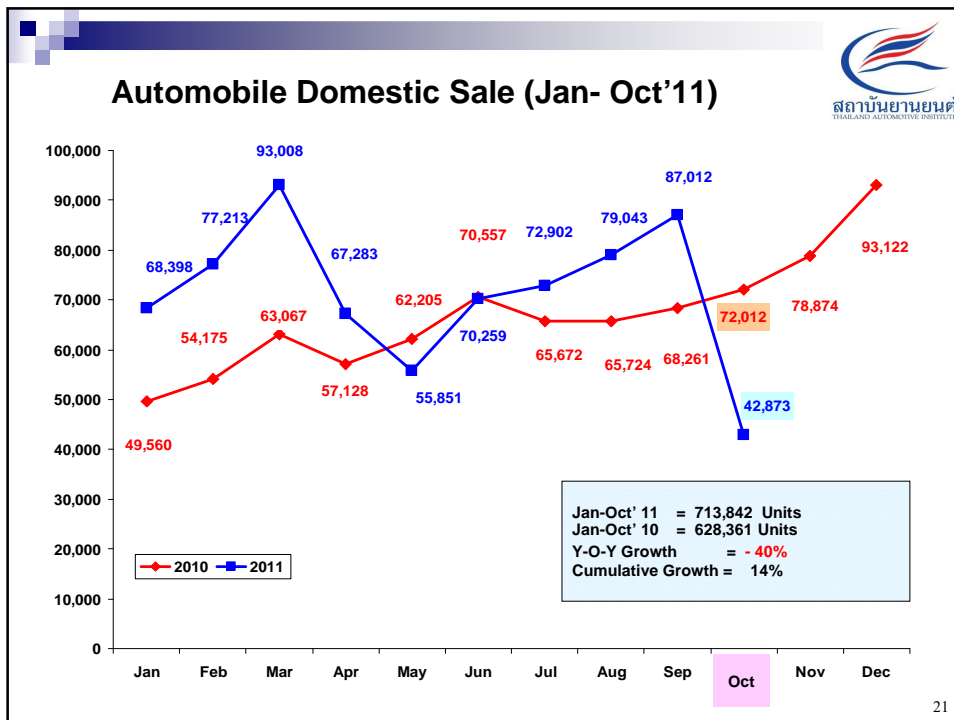
	2009 (Jan-Dec)	2010 (Jan-Dec)	Growth (%)
Export	543,822	779,954	43
-Car	252,451	398,409	58
-Motorcycle	19,617	20,093	2
-Auto parts	271,754	361,453	33
Import	314,573	453,943	44
-Car	28,467	45,761	61
-Motorcycle	275	613	123
-Auto parts	285,831	407,569	43
Export >	229,250	326,011	42

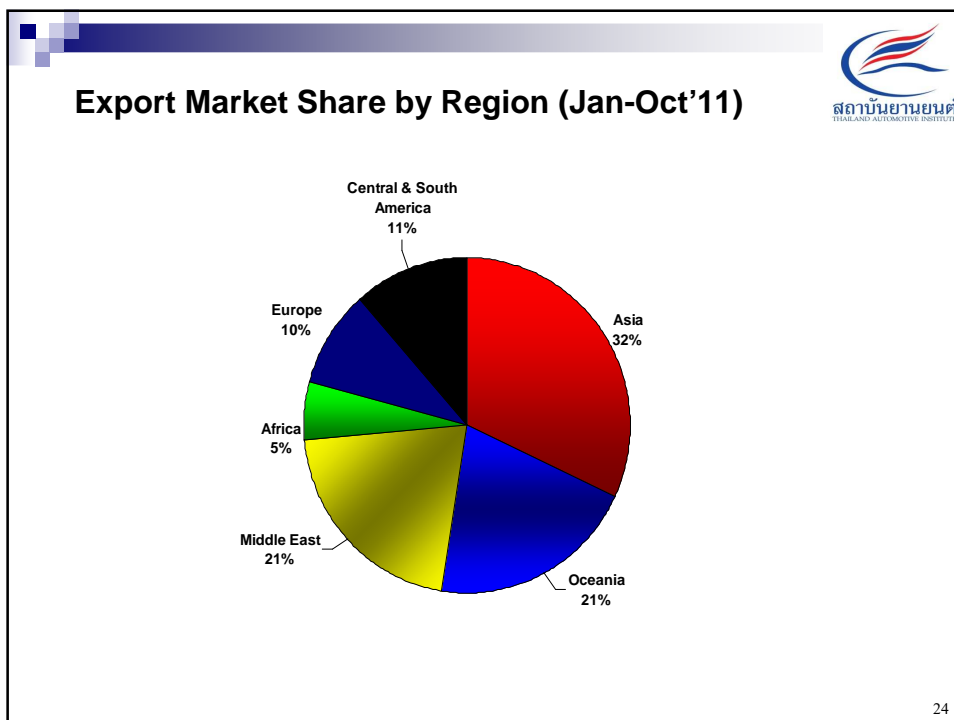
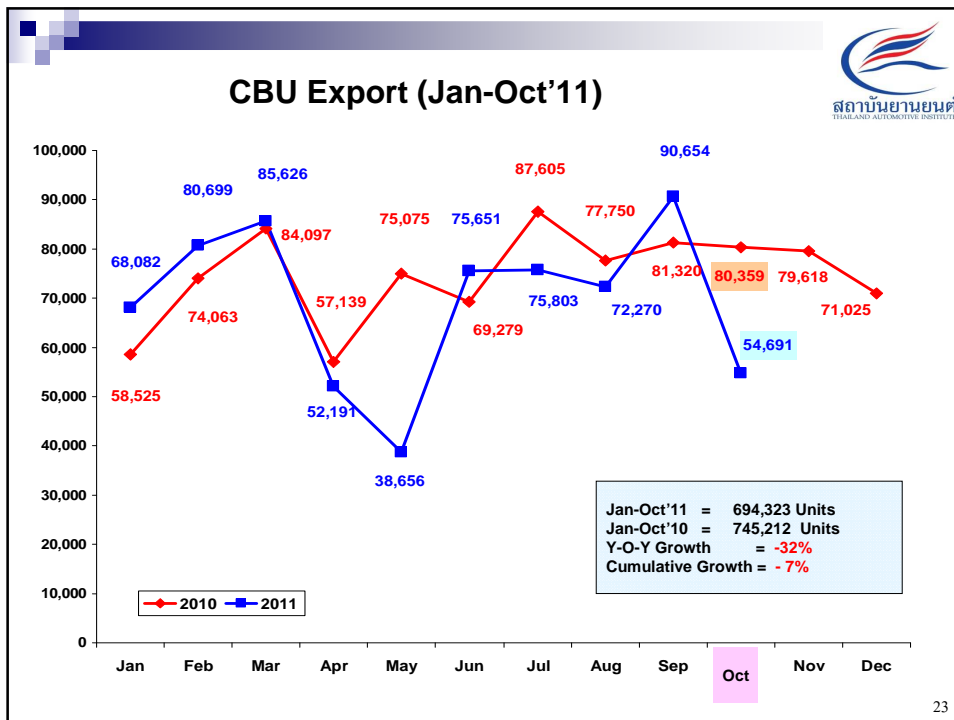
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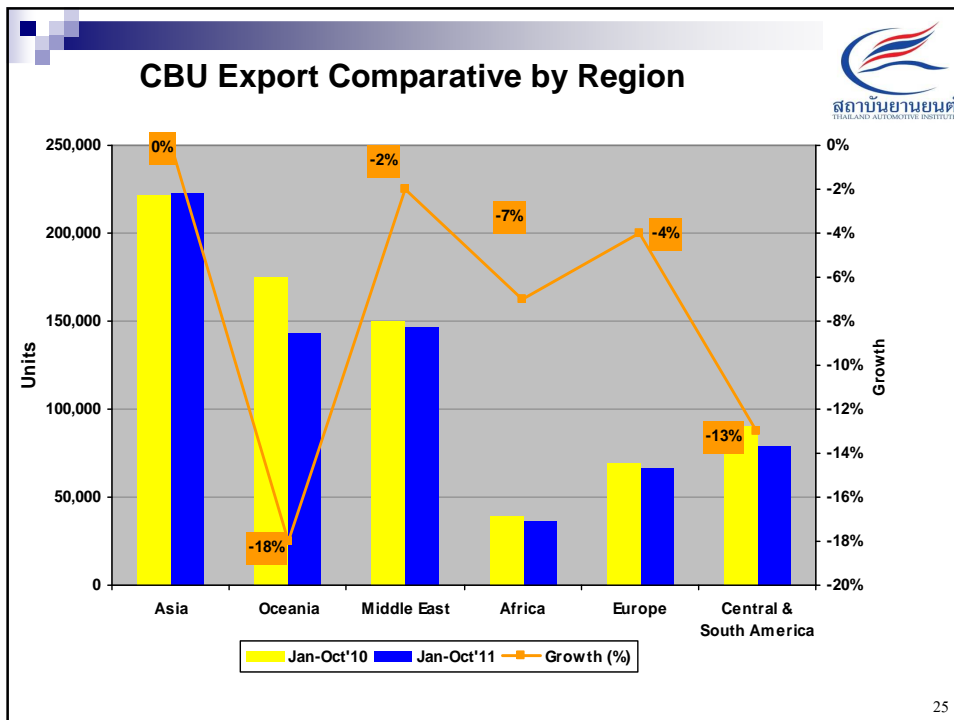


Current Situation of Thai Automotive Industry









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Import-Export Value of Automobile Industry

Unit : Million Baht

	2010 (Jan-Oct)	2011 (Jan-Oct)	Growth (%)
Export	658,275	685,037	4
-Car	342,444	320,446	-6
-Motorcycle	16,566	21,636	31
-Auto parts	299,265	342,955	15
Import	298,670	324,207	9
-Car	30,741	39,811	30
-Motorcycle	419	632	51
-Auto parts	267,510	283,764	6
Export > Import	359,605	360,830	0

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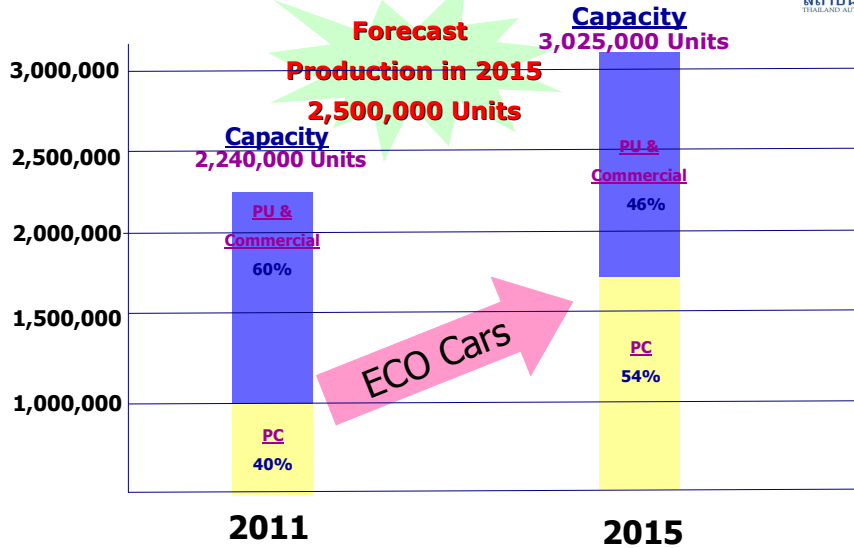
เป้าหมายการผลิตยานยนต์ไทยปี 2555

- ในไตรมาสแรกยังคงมีผลกระทบจากน้ำท่วม คาดว่าจะผลิตได้ประมาณ 4 แสนคัน
- ในสามไตรมาสต่อไปจะมีโรงงานผลิตรถยนต์เปิดสายการผลิตอีก 3 โรงงานและคาดว่าฮอนด้าจะกลับมาผลิตได้คาดว่าจะผลิตได้ประมาณ 1.6 ล้านคัน
- เป้าหมายการผลิตยานยนต์ไทยในปี 2555 อยู่ที่ 2 ล้านคัน โดยแบ่งเป็นตลาดในและส่งออกอย่างละครึ่ง

Estimate Production Capacity

	2012	Investment	2014
Toyota	700,000	200,000	900,000
Ford & Mazda	500,000	-	500,000
Mitsubishi	450,000	-	450,000
Honda	240,000	-	240,000
Nissan	240,000	-	240,000
Isuzu	220,000	100,000	320,000
GM	160,000	-	160,000
Suzuki	135,000	-	135,000
Others	80,000	-	80,000
TOTAL	2,725,000	300,000	3,025,000

Forecast of Thai Automotive Industry



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สถาบันยานยนต์
THAILAND AUTOMOTIVE INSTITUTE

Thank You

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