

Thailand's Investment Policies & Opportunities 投资政策和机遇

Dr. Atchaka Sibunruang
Secretary General
Thailand Board of Investment
阿查卡·希本樂博士
秘书长
泰国投资促进委员会

9 August 2012, Beijing China
2012年8月9日 中国·北京

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Outline 概述

- **Recent Investment Trend**
近期投资趋势
- **Investment Promotion Incentives**
投资促进鼓励和政策
- **Investment Opportunities**
投资机遇
- **BOI Services**
投资委服务



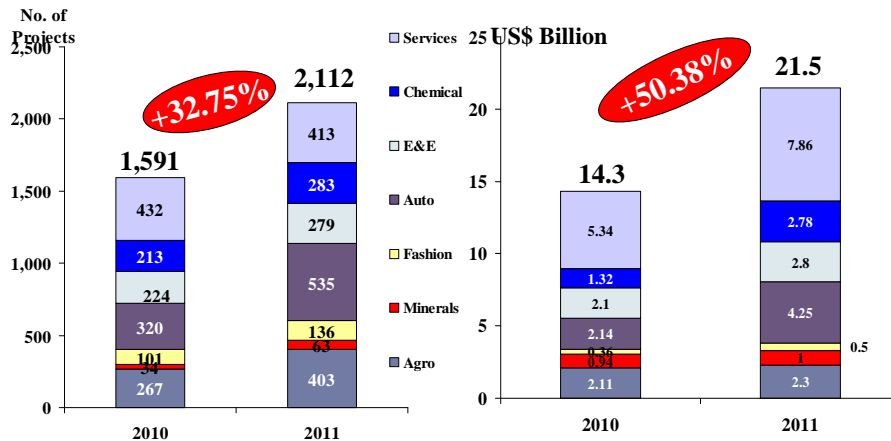
Recent Investment Trend 近期投资趋势



Comparison of All Net Applications for Investment Promotion 2010 – 2011 2010-2011年所有投资项目申请比较

Number of Projects 项目数量

Amount Invested 投资金额



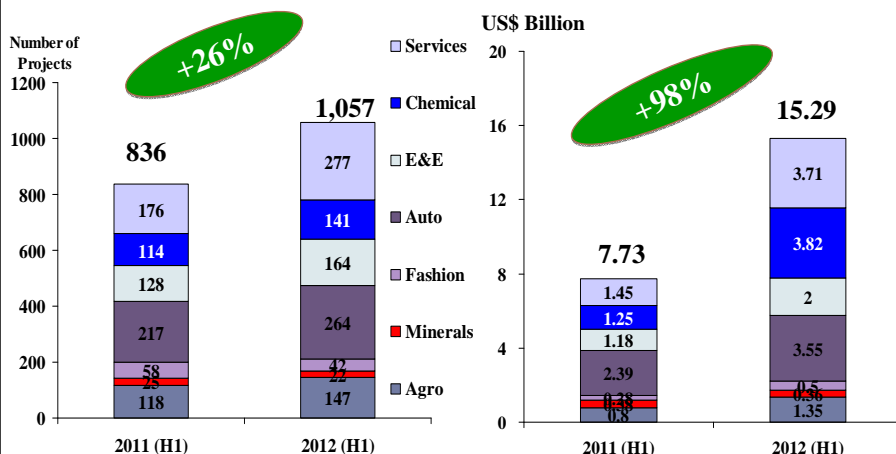
Source: BOI, as of 28 March 2012 Note: US\$1=Bt31.29 in Q2,2012



Comparison of All Net Applications for Investment Promotion Jan-Jun 2011 vs Jan – Jun 2012 2011年1-6月与2012年同期所有投资项目申请比较

Number of Projects 项目数量

Amount Invested 投资金额



Source: BOI, as of 12 July 2012 Note: US\$1=Bt31.29 in Q2,2012

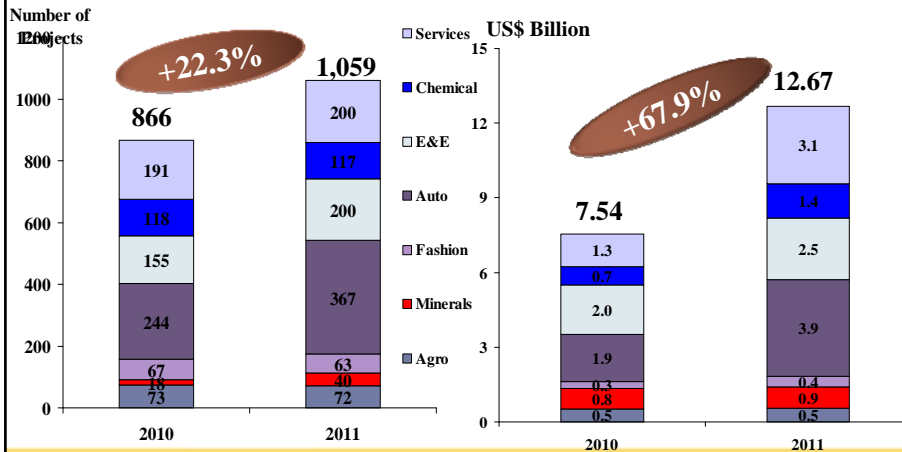


Comparison of Net Foreign Applications for Investment 2010 vs 2011

2010-2011年外商投资项目申请比较

Number of Projects 项目数量

Amount Invested 投资金额



Source: BOI, as of 17 Jan 2012 Note:US\$1=Bt31.29 in Q2,2012

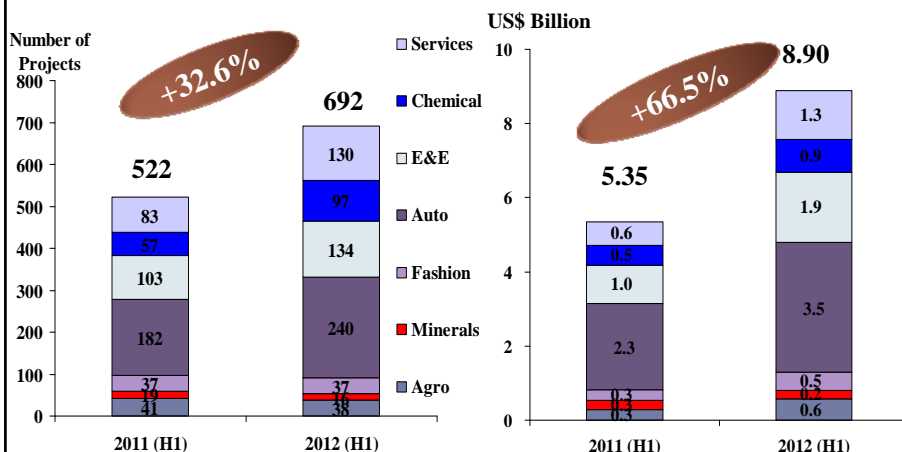


Comparison of Net Foreign Applications for Investment Jan-Jun 2011 vs Jan-Jun 2012

2011年1-6月与2012年同期外商投资项目申请比较

Number of Projects 项目数量

Amount Invested 投资金额



Source: BOI, as of 12 July 2012 Note:US\$1=Bt31.29 in Q2,2012



CHINESE INVESTMENT APPLICATIONS
TOTALS BY SECTOR: 2007 – 2012 (JAN-JUN)
中国投资项目申请行业类别总数:
2007-2012 (1月至6月)

Sector行业	Projects 项目数	US\$ Million 百万美元
Agricultural Products 农产品	37	482
Minerals and Ceramics 矿产业和陶瓷业	12	616
Light Industries/Textiles 轻工业/纺织品	21	130
Metal Products and Machinery 金属制品和机械	38	1,400
Electric and Electronic Products 电气和电子产品	26	116
Chemicals and Paper 化工制品和纸	32	272
Services 服务业	14	1,130
TOTAL 合计	180	4,146

Source: BOI, as of July 30, 2012. Note: Exchange rate: US\$1=Bt31.029 in Q2, 2012

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Major Chinese Investors in Thailand
(中国在泰国主要投资企业)

Company (企业)	Business (业务)
Holley Group Electric (Thailand) 华立(集团)泰国电气有限公司	Electricity Power Meters (电表)
Huawei 华为	IT Services Trade (信息技术服务)
Haier (海尔)	E&E (电器)
CIMC (中国国际海运集团)	Trailer Parts (拖车部件)
Shandong Linglong Tire Co.,Ltd. 玲珑轮胎	Tire (轮胎)
Hangzhou Zhongce Rubber Co.,Ltd 杭州中策橡胶有限公司	Tire (轮胎)
Niran (Thailand) Co.,Ltd. 宁朗(泰国)有限公司	Citric Acid (柠檬酸)

BOI'S INVESTMENT INCENTIVES SCHEME

投资委的投资鼓励计划



Thailand and the BOI offer: 泰国和投资委所提供的便利:



BASIC BOI PRIVILEGES AND MEASURES 投资委基本优惠权限和鼓励政策

Tax Incentives 税收鼓励政策

- ❑ Corporate income tax holidays up to 8 years
- ❑ 最高可获免八年企业所得税
 - Additional 50% reductions of corporate income tax for 5 years
 - 此后五年企业所得税减半
- ❑ Import duty reductions or exemptions on machinery and raw materials
- ❑ 减免机械和原材料的进口关税
- ❑ Double deduction of public utility costs
- ❑ 公共事业成本可按双倍扣除
- ❑ Deductions for infrastructure construction/installation costs
- ❑ 基建和安装成本享受税收减免

Non-Tax measures 非税收鼓励政策

- ❑ Land ownership rights for foreign investors
 - ❑ 外国投资者可拥有土地所有权
 - ❑ One Start One Stop Services Center (OSOS)
 - ❑ 一站式投资服务中心
 - ❑ Work permit/visa facilitation for foreign experts and technicians
 - ❑ 为外国专家和技术员办理工作许可证和签证
- One-Stop Shop,
Visas & Work Permits are
issued in 3 hours
- 一站式中心
签证和工作证可在三小时内
办理完成

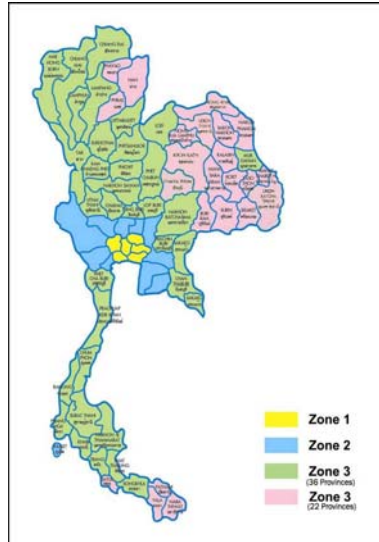
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BOI ZONING INCENTIVES 投资委分区制优惠

Zone:	1	2	3
区域:			
Incentives: Lower	➔		Higher
优惠: 低	➔		高

Import Duty Privileges 进口税优惠	Outside I.E. 工业区外	Inside I.E. 工业区内
Zone 1 1区	50% Reduction 减免50%	50% Reduction 减免50%
Zone 2 2区	50% Reduction 减免50%	Exempt 全免
Zone 3 3区	Exempt 全免	Exempt 全免
Corporate Income Tax 企业所得税	Outside I.E. 工业区外	Inside I.E. 工业区内
Zone 1 1区	No Privilege 不享受优惠	3 Years 3年
Zone 2 2区	3 Years 3年	7 Years 7年
Zone 3 3区	8 Years 8年	8 Years 8年



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Zone-Based Incentives:
区域差异优惠

- Zone 1 一区
- Zone 2 二区
- Zone 3 三区

ZONE-BASED TO SECTOR APPROACH 从区域到行业

Sector Matrix: 行业矩阵
Incentives to strengthen Competitiveness
鼓励提高竞争力

Strategic or Priority Activities
战略或优先发展项目

- **Maximum incentives regardless of location**
不论设在何区，享受最高优惠
- **Customized packages**
客制化优惠


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EXAMPLES OF PRIORITY ACTIVITIES 优先产业例举

- **Agriculture and agro-industries** 农业和农产品加工业
- **Alternative energy** 替代能源产业
- **R&D, eg. Biotechnology, Nanotechnology**
研发行业，例如：生物科技行业，纳米技术
- **Molds & Dies** 模具制造行业
- **Software development** 软件开发行业
- **Waste recycling & recovery** 废弃物回收利用行业

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STI INCENTIVES (OPTIONAL) 技术技能创新优惠政策 (可选择)			
Criteria 标准	Investments and expenditures on: 投资和费用: <ul style="list-style-type: none"> • Research and development or design 研究和开发或设计 • Advanced technology training 先进的技术培训 • Funding educational and research institutions 教育基金和研究基金 • Contribution to Science and Technology Development Fund • 科学与技术开发捐赠基金 		
	Required STI Investment & Expenditures 技术技能创新 (STI) 资金投入标准	Additional Year of Corporate Income Tax Exemption 额外免法人所得税 年限	Exemption of Import Duties on Machinery 免机械进口税
1% of the first 3 years' sale or at least 150 million baht, whichever is less 头三年销售额的1%或至少1.5亿泰铢	1	✓	✓
2% of the first 3 years' sale or at least 300 million baht, whichever is less 头三年销售额的2%或至少3亿泰铢	2	✓	✓
3% of the first 3 years' sale or at least 450 million baht, whichever is less 头三年销售额的3%或至少4.5亿泰铢	3	✓	✓
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Policies for 2010-2012

“Investment for Sustainable Development”

“2010-2012年可持续发展的投资政策”

Application submission deadline: December 31, 2012
申请截止日期: 2012年12月31日

Special incentives for 3 groups of targeted activities 可特别优惠的三组行业

- 1) Manufacture of eco-friendly material and product, e.g. bioplastics
环保材料和产品制造行业, 如生物塑料
- 2) Energy saving and alternative energy
节能及替代能源行业
- 3) High technology activities e.g. industrial electronics, electronic parts for vehicles, biotech, nano-tech, functional fiber etc.
高科技行业, 如:工业电子、汽车电子零配件、生物技术、纳米技术和功能纤维等

Incentives 优惠政策

- Exemption of import duties on machinery
免机械进口税
- 8-year exemption of corporate income tax with no cap
免8年企业所得税无资本总额限制
- 5-year 50% reduction of corporate income tax on net profit
免税期满后, 再获企业所得税5年减半
- 10-year double deduction of transportation, electricity and water supply costs
运输, 水电费用可按双倍计算, 为期10年
- deduction from net profit of 25% of investment in infrastructure installation and construction costs in addition to normal capital depreciation
允许把基础设施的安装和建设费按25%从纯利润中扣除




INVESTMENT OPPORTUNITIES

投资机遇



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Target Industries from China 来自中国的目标产业

1. Auto and Auto Parts 汽车及其零配件
2. Electronic products and parts 电子产品及其部件
3. Machinery, equipment and parts 机械设备及其配件
4. Alternative energy 替代能源
5. High value added natural rubber product 高附加值的天然橡胶产品

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56 OF TOP 100 GLOBAL SUPPLIERS 2010 ACTIVE IN THAILAND

2010年, 在泰国经商的56名全球100强供应商

<i>Aisin Seiki</i>	<i>Denso</i>	<i>3M</i>	<i>Stanley</i>
Akebono Brake	Draexlmaier	Mahle	<i>Sumitomo</i>
Alpine	Faurecia	Michelin	<i>Takata</i>
American Axle	Federal-Mogul	Mitsuba	Teneco
Asahi Glass	F-Tech	<i>Mitsubishi</i>	TI Automotive
Autoliv	GKN Driveline	<i>NHK Spring</i>	Tokai Rika
BASF	Goodyear	<i>NSK</i>	<i>Toyoda Gosei</i>
Bayer	Grupo Antolin	<i>NTN</i>	<i>Toyota Boshoku</i>
BorgWarner	Hayes Lammerz	Omron	TRW
Bridgestone	<i>Hitachi</i>	Pioneer	<i>TS Tech</i>
<i>CalsonicKansei</i>	Johnson Control	Rieter Auto	Valeo
Continental	<i>JTEKT</i>	Robert Bosch	Visteon
Dana	<i>Koito</i>	Sanden	<i>Yazaki</i>
Delphi	Lear	Showa	ZF

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ELECTRONICS AND ELECTRICAL INDUSTRY 电子和电气产业

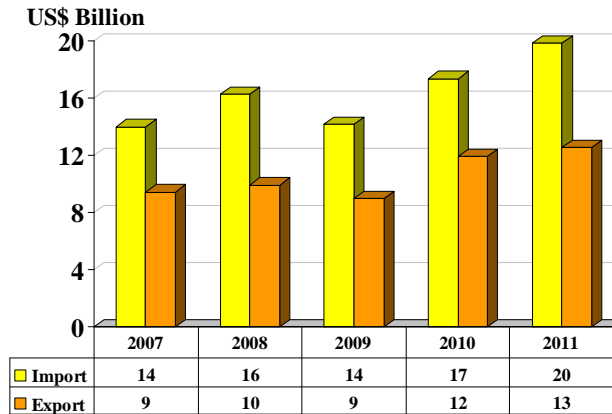
- Thailand Exports Ranked 24th in the World
- 泰国出口世界排名第24位。
- E&E exports **US\$53.95 billion** in 2011, 23% of total exports
- 2011年电子和电气出口值达**539.5亿美元**, 占总出口值的23%。
- Major products: **HDD, IC, TV, A/C & other WG**
- 主要产品: **硬盘驱动器, 集成电路, 电视, 空调和其他波导管**
- Thailand is the **world's largest producer** of HDDs
- 泰国是**世界上最大的硬盘驱动器生产国**。
- A leading country in the manufacture of **integrated circuits and white goods**
- 是制造**集成电路和大型家用电器**的领先国家
- Strong supporting industries for electrical appliances
 - **Compressors, motors, plastic and metal parts**
 - 强大的电气制品辅助产业
 - **压缩机, 电动机, 塑料和金属零配件**

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Source: Electrical and Electronics Institute, as of February'12

MACHINERY AND PARTS: IMPORTS AND EXPORTS, 2007 – 2011
 2007年 - 2011年泰国工业机械及其零配件进出口概况



Source: Ministry of Commerce, 2 February 2012 Note: US\$1=Bt30.49 in 2011

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OPPORTUNITIES IN MACHINERY

机械行业的机遇

- Thailand continues to industrialize, but is dependent on foreign industrial machinery for immediate future.

泰国持续实现工业化，但关键还是依靠未来外国机械工业的发展。



- High demand for: 高需求:

- Food and farm machinery
食品 and 农业机械
- Alternative energy/energy conservation machinery
替代能源/节能机械
- Textile machinery 纺织机械
- Automotive machinery 汽车机械
- Mould & Die Industry 模具和钢模机械



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Thailand's Alternative Energy Development Plan
泰国替代能源发展计划

Target 25 % of RE in Total Energy Consumption By 2021
目标为2021年前，再生能源占总能源消耗的 25 %

Solar 太阳能	Wind 风力	Hydropower 水力	New type of energy 新种能源		
2,000	1,200	1,608MW	Tidal Wave 潮汐	Geothermal 地热	
MW	MW		2MW	1MW	
3,200MW			3MW*		
Bio energy 生物质能源			Bio fuel 生物质燃料		
Biomass 生物质	Biogas 生物质 气体	Solid waste 固体 垃圾	Ethanol 乙醇	Bio-diesel 生物质 柴油	New types to replace diesel (hydrogen) 新种替代柴油 (氢气)
3,630MW	600MW	160MW	9ML/d**	5.97ML/d	25ML/d
4,390MW			To substitute for fossil fuels by 44% 替代44%的化石燃料		

Source: Ministry of Energy *Megawatt (million watt) **Million litres/day 来源：能源部 *百万瓦特 **百万公升/日

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“ADDER” : FEED-IN PREMIUMS 定期关税补助

Fuel 燃料	Adder 补助 (B/kWh) (US\$)	Supporting period 支持期限 (Year) (年)
<input type="checkbox"/> Biomass 生物能		
- Installed capacity <= 1 MW 装机容量<=1兆瓦	0.50	7
- Installed capacity >1 MW 装机容量>1兆瓦	0.30	7
<input type="checkbox"/> Biogas (all categories of production sources) 沼气		
- Installed capacity <= 1 MW 装机容量<=1兆瓦	0.50	7
- Installed capacity > 1 MW 装机容量>1兆瓦	0.30	7
<input type="checkbox"/> Waste (community waste, not hazardous industrial waste, and inorganic waste) 废弃物		
- AD & b LFG 沼气	2.50	7
- Thermal Process 热工过程	3.50	7
<input type="checkbox"/> Wind power 风力		
- Installed capacity <= 50 kW 装机容量<= 50 兆瓦	4.50	10
- Installed capacity > 50 kW 装机容量> 50兆瓦	3.50	10
<input type="checkbox"/> Mini and micro hydropower 小型微型水电厂		
- capacity 50-200 kW 装机容量50-200兆瓦	0.80	7
- capacity < 50 kW 装机容量<兆瓦	1.50	7
<input type="checkbox"/> Solar power	6.50	10

Source: DEDE's Presentation by Deputy Director-General, as of Feb 21, 2012

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RUBBER INDUSTRY OVERVIEW 橡胶行业概述

Thailand's Rubber Industry 泰国橡胶工业

The world's largest producers of rubber
泰国是全球最大的橡胶生产国

Only 10% of rubber produced in
Thailand has been utilized as raw
material for rubber industry

只有约百分之十的橡胶原料用在国
内生产，其余作为原料出口。

China as the largest export market with
the total value of 153.27 Billion Baht
中国是泰国最大的出口国，出口总
额为1532.70 亿泰铢。

Thailand's Rubber Exports 泰国橡胶出口

Total export value in 2011: 397.07 Billion
US\$. (as the 5th top export item)

2011年总值：3970.07 亿泰铢（橡胶
为第五大出口产品）。

The example of Chinese companies that
import rubber from Thailand:

- Linglong tyre
- Hangzhou zhongce
- Guangdong nongken

从泰国进口橡胶的中国公司例子：

- 玲珑轮胎
- 杭州中策
- 广东农垦

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Incentives for Rubber Industry 橡胶工业的优惠政策

(1): Incentives for Manufacture of Products from Natural Rubber (category 1.16) 天然橡胶产品生产行业的鼓励政策（1.16组）

- 8-year corporate income tax exemption with cap, regardless of location
- 不论项目所在何区，免缴八年法人所得税，有免税上限。
- Exemption of import duties on machinery regardless of location
- 不论项目所在何区，免缴机械进口税。
- Additional incentives for projects in zone 3
- 设在三区的投资项目另享受额外鼓励政策。

(2): Incentives for Manufacture of vehicle tires (category 4.10) 轮胎生产行业的鼓励政策（4.10组）

- Including all above incentives.
- 包括以上所有优惠政策
- 5-year corporate income tax 50% reduction, after tax exemption period
- 免税期满后，法人所得税减征50%，为期五年。

*Must be applied by December 2012
*申请须于2012年12月底之前提交

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BOI SERVICES

投资委服务

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BOI SUPPORT SERVICES

投资委服务支持



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Investment Matchmaker Program

投资对接计划

1-Stop for visas & work permits: work permits in 3 hours

一站式服务：三小时内完成签证、工作证办理

Industrial Subcontracting Services

Vendors meet customers program
(BUILD Unit)

工业分包商服务：分包商与客户面对面计划
(投资委工业链接发展事务组)

ASEAN Supporting Industry Database

东盟辅助产业数据库

Interaction with other govt. agencies on behalf of investors

为投资者接洽其他政府部门

Country desks 多国事务小组

Overseas offices 海外办事处

ASID Database



The ASEAN Supporting Industry Database (www.asid.net) provides detailed information on supporting industries in Thailand and ASEAN countries. So far ASID has 20,382 members, 14,021 of which are Thai companies.

东盟辅助产业数据库(www.asid.net)提供有关在泰国和东盟辅助产业的详细信息。到目前为止，东盟辅助产业数据库已拥有20,382位成员，其中有14,021位成员为泰国公司。



The BOI Unit for Industrial Linkage Development

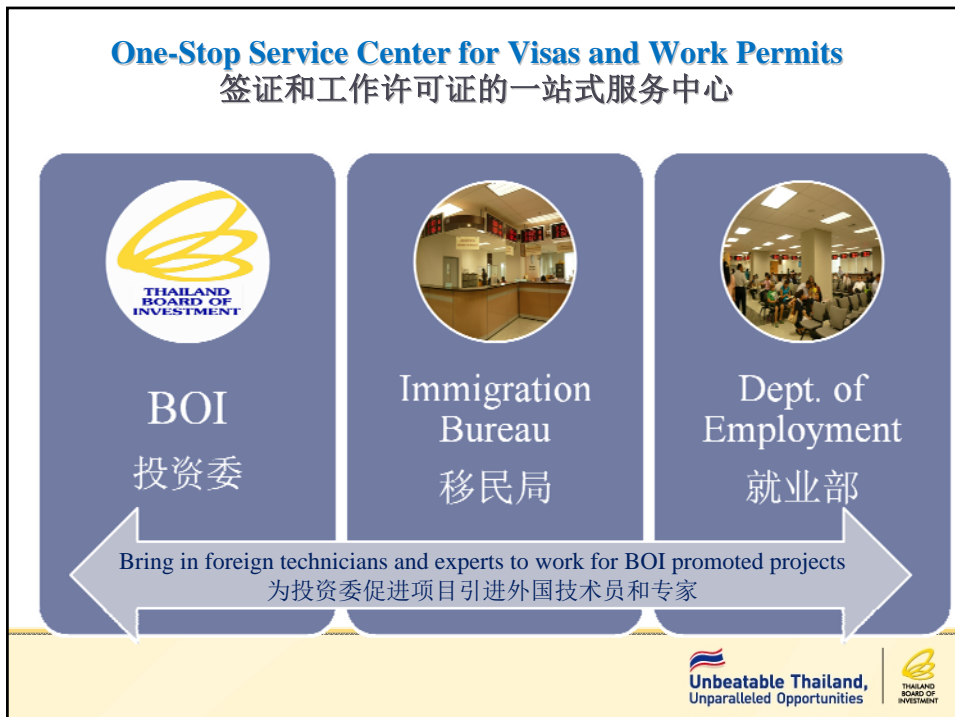
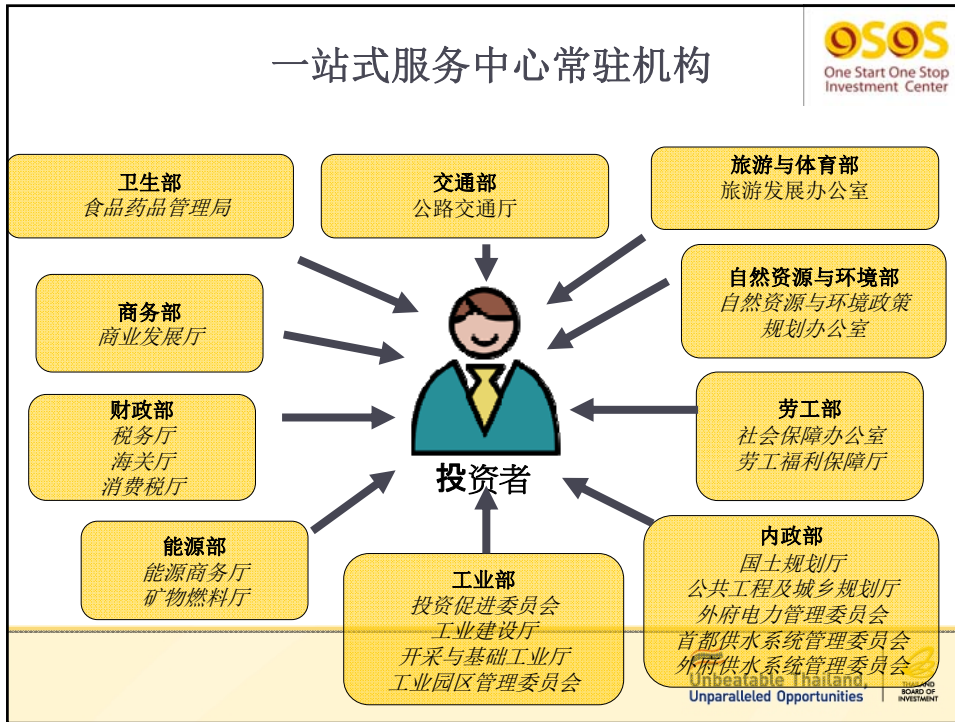
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One Start One Stop Investment Center



- 21 agencies facilitating company establishment in Thailand
- 在泰国设立21个常驻机构
- Help investors with applications to make sure investors know what is required to: 帮助投资者理清申请程序
 - Register a company 注册公司
 - Apply for investment promotion privileges 申请投资优惠
 - Obtain a foreign business license 申领外资经营许可
 - Tax registration 办理税务登记
 - Complete an environmental impact assessment 完成环境影响评估
 - Obtain utilities, etc. 取得设施使用权
- OSOS staff will also accept applications for licenses and permits such as corporate name registration, corporate tax ID numbers, VAT registration, foreign business licenses, etc.
- 一站式服务中心还受理诸如企业名称注册、法人所得税付税号码申领、增值税登记、外资经营许可和投资优惠申请等事宜





BOI OFFICE IN BEIJING 泰国投资委驻北京办事处

Beijing 北京

Thailand Board of Investment
Royal Thai Embassy
No. 40, Guang Hua Road
Beijing 100600 P.R. China

Telephone: +86 10 6532-4510
Fax: +86 10 6532-1620
Email: beijing@boi.go.th



Mr. Apipong Khunakornbodintr
Director
主任

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BOI OFFICE IN SHANGHAI 泰国投资委驻上海办事处

Shanghai 上海

Thailand Board of Investment
Royal Thai Consulate-General
15F, Crystal Century Tower 567
Weihai Road, Shanghai 200041,
P.R.C.

Telephone: +86 21 6288 9728
+86 21 6288 9729
Fax: +86 21 6288 9730
Email: shanghai@boi.go.th



Pittaya Lertmaharit
Director
主任

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BOI OFFICE IN GUANGZHOU 泰国投资委驻广州办事处

Guangzhou 广州

Thailand Board of Investment
Royal Thai Consulate-General
Room 1216-1218, Garden Tower
368, Huanshi Dong Road,
Guangzhou 510064 P.R. China

Telephone: +86 20 8333-8999 Ext:
1216 to 18
+86 20 8387-7770
Fax: +86 20 8387-2700
Email: guangzhou@boi.go.th



Bang-on Thitapaisalpol

Director
主任

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THANK YOU
谢谢



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