



# Asean Suppliers Report

## Report Background

The ASEAN is home to some of the fastest growing economies in the world. Member countries have become increasingly aware of the potential and growing role that they play in the global automotive industry. This has begun to make all industry players including governments increasingly knowledgeable and tuned into the opportunities. Governments are seeing that targeted regulations can attract investments, investors are choosing the most promising markets to enter and both OEMs and suppliers are looking to benefit.

These developments led to the ASEAN Secretariat's Roadmap for Integration of the Automotive Products Sector and the push to implement the ASEAN Free Trade Agreement (AFTA), which came into full effect in January 2010, allowing for zero-tariff trade among six member nations. These movements signal the emergence of a new era in this region's automotive and automotive supplier industry.

## About this Report

This new report provides a detailed look at the ASEAN Automotive & Supplier Market, focusing on Indonesia, Malaysia, Philippines, Thailand and Vietnam.

For each country, the report examines the macro economic situation, planned investment in infrastructure development, national automotive policy and plans, manufacturing advantage, structure of the automotive industry, investments by OEMs, investments by vehicle component suppliers, who supplies whom, opportunities and future outlook.

Also included are 60 profiles of the top suppliers in the region.

## Table of Contents

### ASEAN Automotive & Supplier Market Overview

#### Indonesia

- Overview of Macro Economic Situation
- Planned Investment in Infrastructure Development Projects
- National Automotive Policy & Plans
- Excise Tax Structure Import Duty
- Manufacturing Advantage
- Overview of Automotive Industry & Supply Chain
- Production in 2010 & Forecasts
- Export Destinations
- Structure of Automotive Industry

Manufacturing Presence of OEMs & Production Bases  
Investments by OEMS  
Investments by Vehicle Component Suppliers  
Who Supplies Whom  
Opportunities & Future Outlook

## **Malaysia**

Overview of Macro Economic Situation  
Planned Investment in Infrastructure Development Projects  
National Automotive Policy & Plans  
Excise Tax Structure Import Duty  
Manufacturing Advantage  
Overview of Automotive Industry & Supply Chain  
Production in 2010 & Forecasts  
Structure of Automotive Industry  
Manufacturing Presence of OEMs & Production Bases  
Location of Suppliers & Clusters  
Investments by OEMS  
Investments by Vehicle Component Suppliers  
Who Supplies Whom  
Opportunities & Future Outlook

## **Philippines**

Overview of Macro Economic Situation  
Planned Investment in Infrastructure Development Projects  
National Automotive Policy & Plans  
Excise Tax Structure Import Duty  
Manufacturing Advantage  
Overview of Automotive Industry & Supply Chain  
Production in 2010 & Forecasts  
Export Destinations  
Structure of Automotive Industry  
Manufacturing Presence of OEMs & Production Bases  
Investments by OEMS  
Investments by Vehicle Component Suppliers  
Who Supplies Whom  
Opportunities & Future Outlook

## **Thailand**

Overview of macro-economic situation  
Planned investment in infrastructure development projects  
National automotive policy & plans  
Excise Tax Structure Import Duty  
Manufacturing advantage  
Overview of automotive industry & supply chain  
Production in 2010 & Forecasts  
Export Destinations  
Structure of automotive industry  
Manufacturing presence of OEMs & production bases  
Location of Suppliers & Clusters  
Investments by OEMS  
Investments by vehicle component suppliers  
Who Supplies Whom

Opportunities & future outlook

## **Vietnam**

Overview of Macro Economic Situation  
Planned Investment in Infrastructure Development Projects  
National Automotive Policy & Plans  
Excise Tax Structure Import Duty  
Manufacturing Advantage  
Overview of Automotive Industry & Supply Chain  
Production in 2010 & Forecasts  
Export Destinations  
Structure of Automotive Industry  
Manufacturing Presence of OEMs & Production Bases  
Investments by OEMS  
Investments by Vehicle Component Suppliers  
Who Supplies Whom  
Opportunities & Future Outlook

## **Company Profiles**

AAPICO Hitech  
ACE Polymers  
ADR Group  
AGC Automotive  
Aisin AI Thailand  
APM  
Autoliv  
Automotive Air-conditioning Technology Philippines  
Bosch Automotive Thailand  
Bosch Malaysia  
Bridgestone Tire Indonesia  
Continental Automotive  
Continental Sime Tyre  
Delloyd Ventures  
Denso Manufacturing Vietnam  
Denso Thailand  
EP Manufacturing  
Exedy Thailand  
Fujitsu Ten  
Gajah Tunggal  
GKN Driveline  
Goodyear Indonesia  
Goodyear Malaysia  
Goodyear Philippines  
Goodyear Thailand  
Hirota Holdings  
PT Denso Indonesia  
Ingress Corporation  
Inoue Rubber Thailand  
Kumho Tire  
Malaysian Automotive Lighting  
MCIS Safety Glass  
Multi-Code Electronics Industries  
NHK Spring  
Nipress

NSK Bearings  
Oriental Holdings  
Panasonic Automotive Systems  
Permintex Furukawa Autoparts  
Philippine Auto Components  
Asian Transmission Corporation  
PT Astra Otoparts  
Robert Bosch Vietnam  
Roberts Automotive & Industrial Parts Manufacturing  
Sapura Industrial  
Siam Aisin  
Siam Tyre  
Somboon Advance Technology  
Sunchirin Industries  
Takata-TOA  
Thai Bridgestone  
Thai Steel Cable  
Thai Rung Union Car  
Thai Stanley Electric  
Tracoma Holdings  
Valeo Siam  
Yazaki-Torres Manufacturing  
Yokohama Tire Philippines  
Yuasa Thailand

## **Tables and Figures**

Figure 1: Passenger Car Sales in 4 ASEAN Countries (units)  
Figure 2: Vehicle Production (units) & Export (%) in Indonesia and Thailand  
Figure 3: ASEAN Passenger Car Production Forecast (units)  
Figure 4: Domestic Vehicle Sales by Type (2010)  
Figure 5: Indonesia Automotive Production (units)  
Figure 6: Indonesia s Automotive Exports/Imports  
Figure 7: Total Market Share by OEM (2010)  
Figure 8: Indonesia Automotive Production by Carmaker (units)  
Figure 9: Passenger Car & Light Vehicle Production Forecast (units)  
Figure 10: Passenger Car & Light Vehicle Production Forecast (units)  
Figure 11: Market Share by Carmaker (2010)  
Figure 12: Malaysian Automotive Production (units)  
Figure 13: Malaysian Passenger Car Sales (units)  
Figure 14: Passenger Car & Light Vehicle Production Forecast (units)  
Figure 15: Cumulative FDI into the Philippines (2004-2009)  
Figure 16: Passenger Vehicle Market Share by Sales (2010)  
Figure 17: Philippine Automotive Sales (units)  
Figure 18: Automotive CBU Imports by Source (2010)  
Figure 19: Philippine Vehicle Market Share by Sales (2010)  
Figure 20: Passenger Car & Light Vehicle Production Forecast (units)  
Figure 21: Thai Automotive Industry (units)  
Figure 22: Automotive Production by Vehicle Type (2009)  
Figure 23: Automotive Exports by Country (2009)  
Figure 24: Automotive Parts Exports (2010)  
Figure 25: Map of Automotive Assemblers in Thailand  
Figure 26: Thai Passenger Car Market Share (2009)  
Figure 27: Clusters of automotive suppliers by location  
Figure 28: Thailand Passenger Car & Light Vehicle Production Forecast (units)  
Figure 29: FDI by number of projects January-April 2011

Figure 30: Vehicles Sales by Type (2010)  
Figure 31: Vehicle Sales in Vietnam (units)  
Figure 32: Total Vehicles Sales Market Share by Carmaker (2010)  
Figure 33: Total Exports by Destination (2010)

Table 1: New Investments and New Model Introductions by Carmakers in ASEAN region:  
Table 2: Automotive Excise Tax Schedule  
Table 3: Automotive Import Duties & Luxury Tax  
Table 4: Economic Indicator Comparison with China:  
Table 5: OEMs and Assembler Plants in Indonesia  
Table 6: Planned New Car Models in Indonesia  
Table 7: Local Content Requirements  
Table 8: Automotive Import Duties  
Table 9: Automotive Excise Tax Schedule  
Table 10: Economic Indicator Comparison with China:  
Table 11: OEMs' and Assemblers' Plants in Malaysia  
Table 12: Planned New Car Models in Malaysia  
Table 13: BOI Incentives for CBU Exports under AEP  
Table 14: Automotive Excise Tax Schedule  
Table 15: Economic Indicator Comparison with China:  
Table 16: OEMs and Assembler Plants in the Philippines  
Table 17: Planned New Car Models in the Philippines  
Table 18: Automotive Import Duties  
Table 19: Automotive Excise Tax Schedule  
Table 20: BOI Incentives by Regional Zone  
Table 21: Economic Indicator Comparison with China  
Table 22: OEMs and Assembler Plants in Thailand  
Table 23: Carmakers Committed to the Eco-car Project  
Table 24: Planned New Car Models in Thailand  
Table 25: Automotive Import Duties (2011)  
Table 26: Automotive Excise Tax & VAT Schedule  
Table 27: Economic Indicator Comparison with China:  
Table 28: OEMs and Assembler Plants in Vietnam  
Table 29: Planned New Car Models in Vietnam