



Miss Kanchana Noppun

Thailand Board of Investment

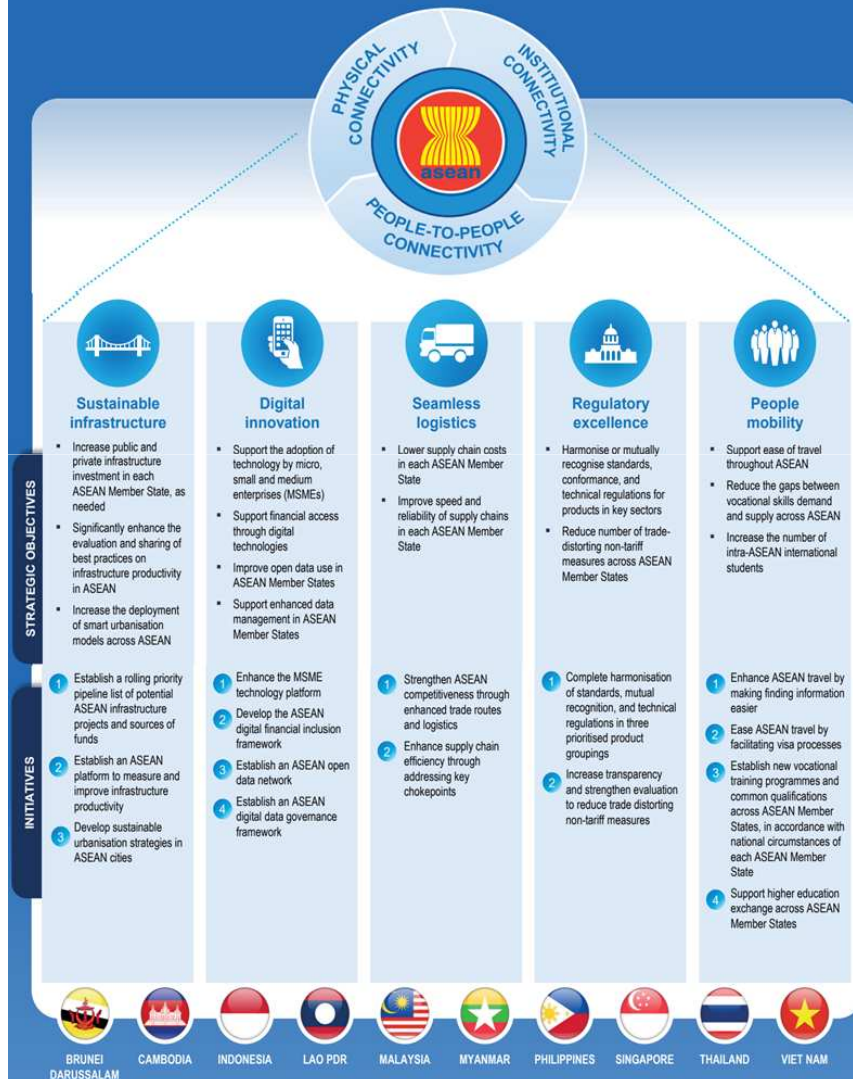


The Vision of ASEAN Connectivity 2025:

*“To achieve a seamlessly and
comprehensively connected and
integrated ASEAN that will promote
competitiveness, inclusiveness, and a
greater sense of Community”*

ASEAN Connectivity 2025

Vision: "To achieve a seamlessly and comprehensively connected and integrated ASEAN that will promote competitiveness, inclusiveness, and a greater sense of Community."





Chairman's Statement of the 34th ASEAN Summit, Advancing Partnership for Sustainability Bangkok, 23 June 2019

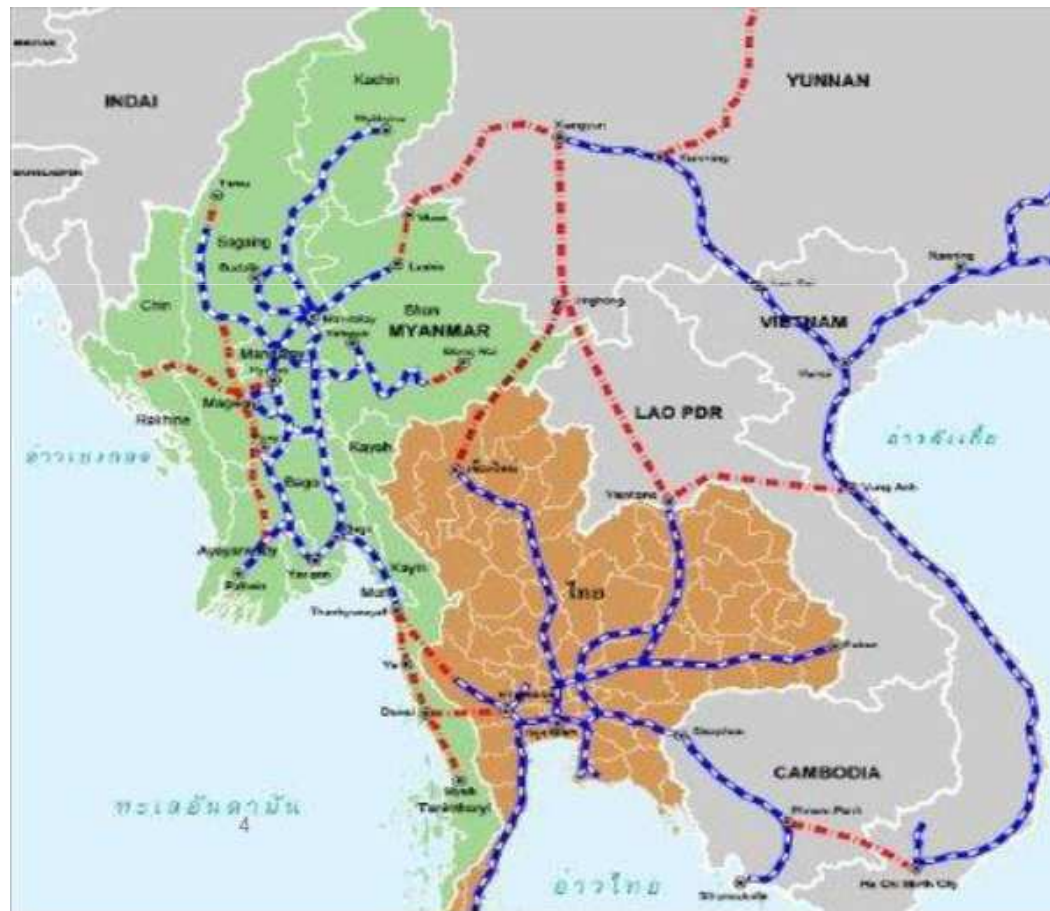
We welcomed ongoing sub regional economic cooperation efforts which continue to serve as catalysts for economic growth and sustainable development and for reinforcing regional economic integration and connectivity.



ASEAN will be one of the most exciting places for businesses over the next 15 years



Prime Location for Connectivity through Land Transports

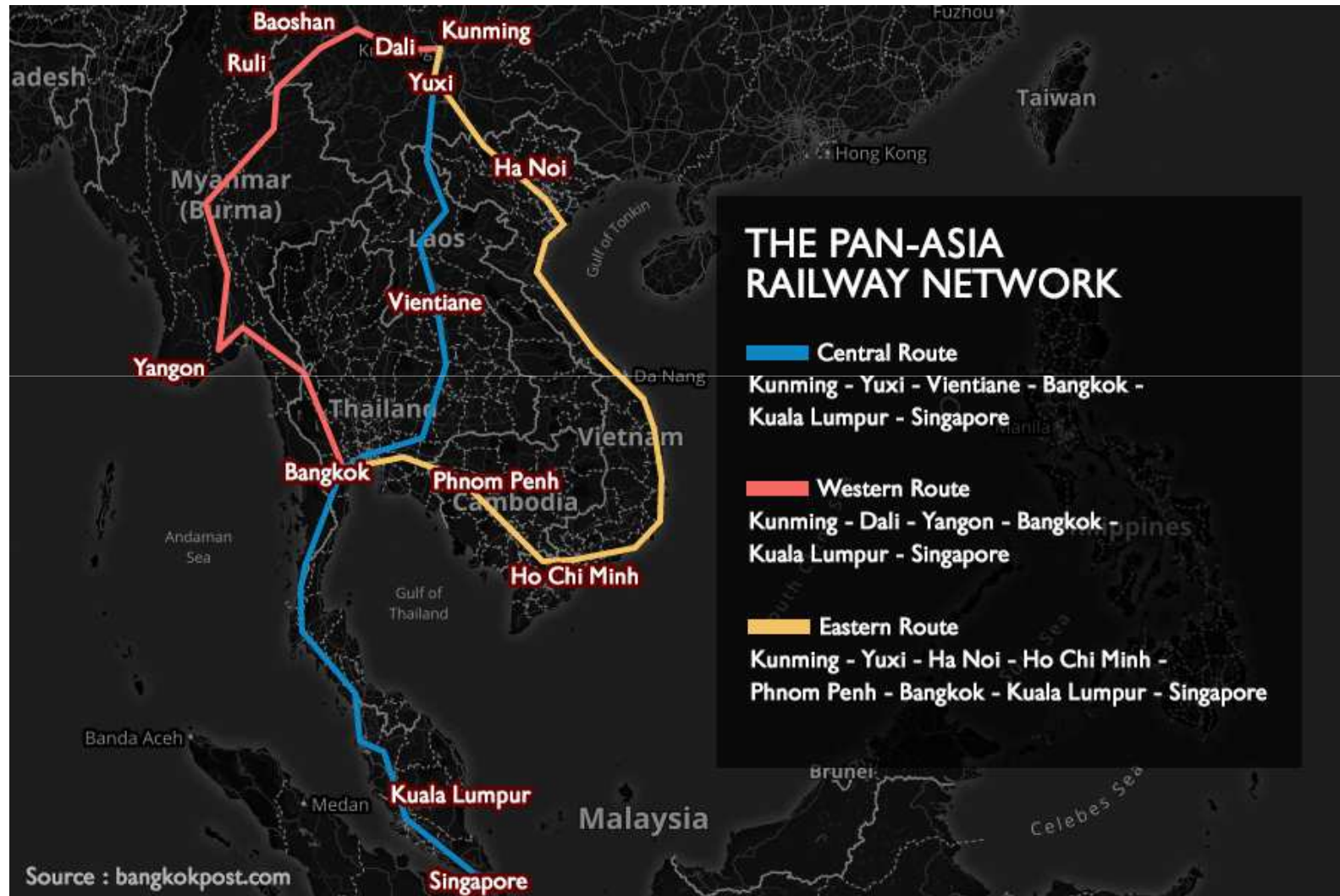


ASEAN at the Crossroad of New Global Policy Initiatives

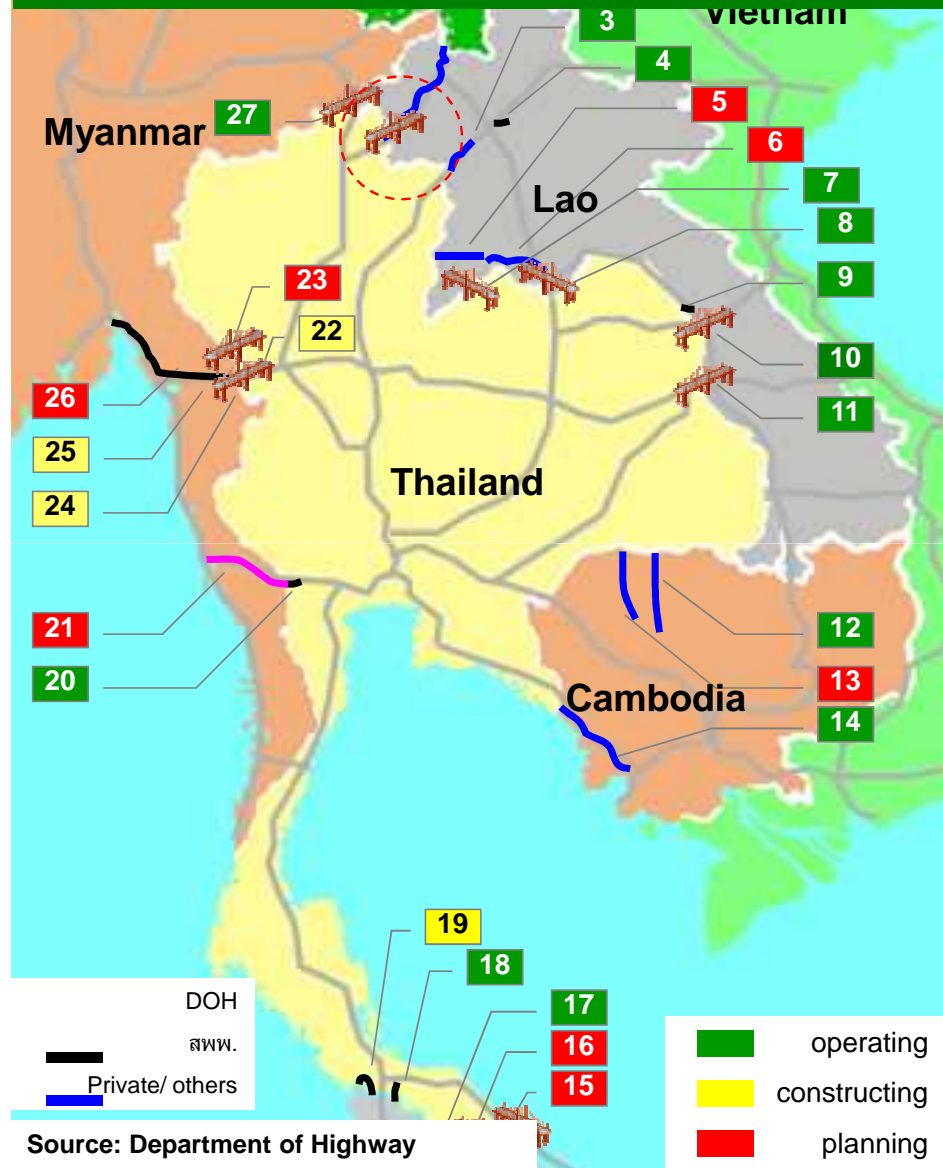
China's One Belt, One Road



High Speed Train from China to Singapore



Key Projects: Road Network



ASEAN Connectivity

Thailand – Lao PDR (11 projects)

1. Friendship Bridge 4 (Chiang Khong-Huay Sai)
2. R3A in Laos
3. Huay Kon – Pak Beng
4. Hinhway No.13 North – Sang Kha Lok
5. Phu Du – Pak Lai
6. Highway No. 11 Lao PDR
7. Bridge across Huang River, Tha Li, Loei
8. Friendship Bridge 1 (Nong Khai-Thanaleng)
9. Road access Ban Woen Tai Pier
10. Friendship Bridge 3 (Nakhon Panom-Kham Mouane)
11. Friendship Bridge 2 (Mukdahan-Savannakhet)

Thailand – Cambodia (3 projects)

12. Road No. 67 Chong Sa Ngam – Siem Reap
13. Road No. 68 Chong Chom - Kralanh
14. Road No. 48 Ko Kong – Sre Ambel

Thailand – Malaysia (5 projects)

15. Bridge across Kolok River, Tak Bai
16. Bridge across Ko Lok River 2, Sungai Kolok
17. Bridge across Ko Lok River 3, Bu Ke Ta
18. Nathawi-Ban Pra Kop
19. Kuan Sa Taw-Wang Pra Chan

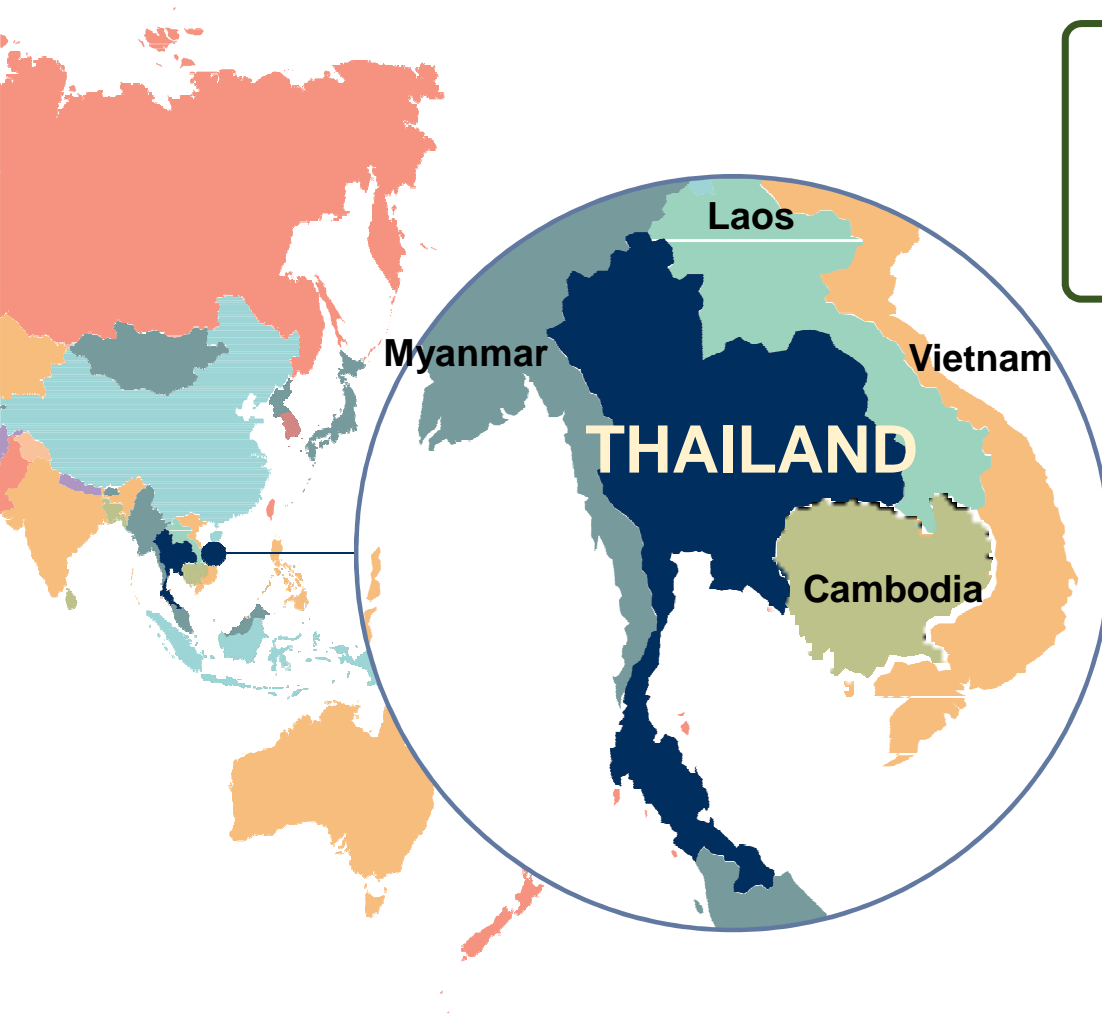
Thailand – Myanmar (8 projects)

20. Phu Nam Ron – Thailand-Myanmar border
21. Kanchanaburi - Dawei
22. Friendship Bridge (Mae Sot)
23. Friendship Bridge 2(Mae Sot)
24. Myawaddy – Dawna Foothill
25. Dwana foot print – Kawkareik
26. Kawkareik - Thaton
27. Friendship Bridge (Mae Sai)

Thailand: the Crossroads of ASEAN

Strategic Location Gateway to ASEAN

**“We are surrounded by
the world’s economic powerhouses”**



**ASEAN
Economic
Community**



643 million population
(11% of world population)



**Regional Comprehensive
Economic Partnership *(RCEP)**

ASEAN+6



3.5 billion population
(55% of world population)

Strategic Location: Right in the Heart of CMLVT, ASEAN & ASIA



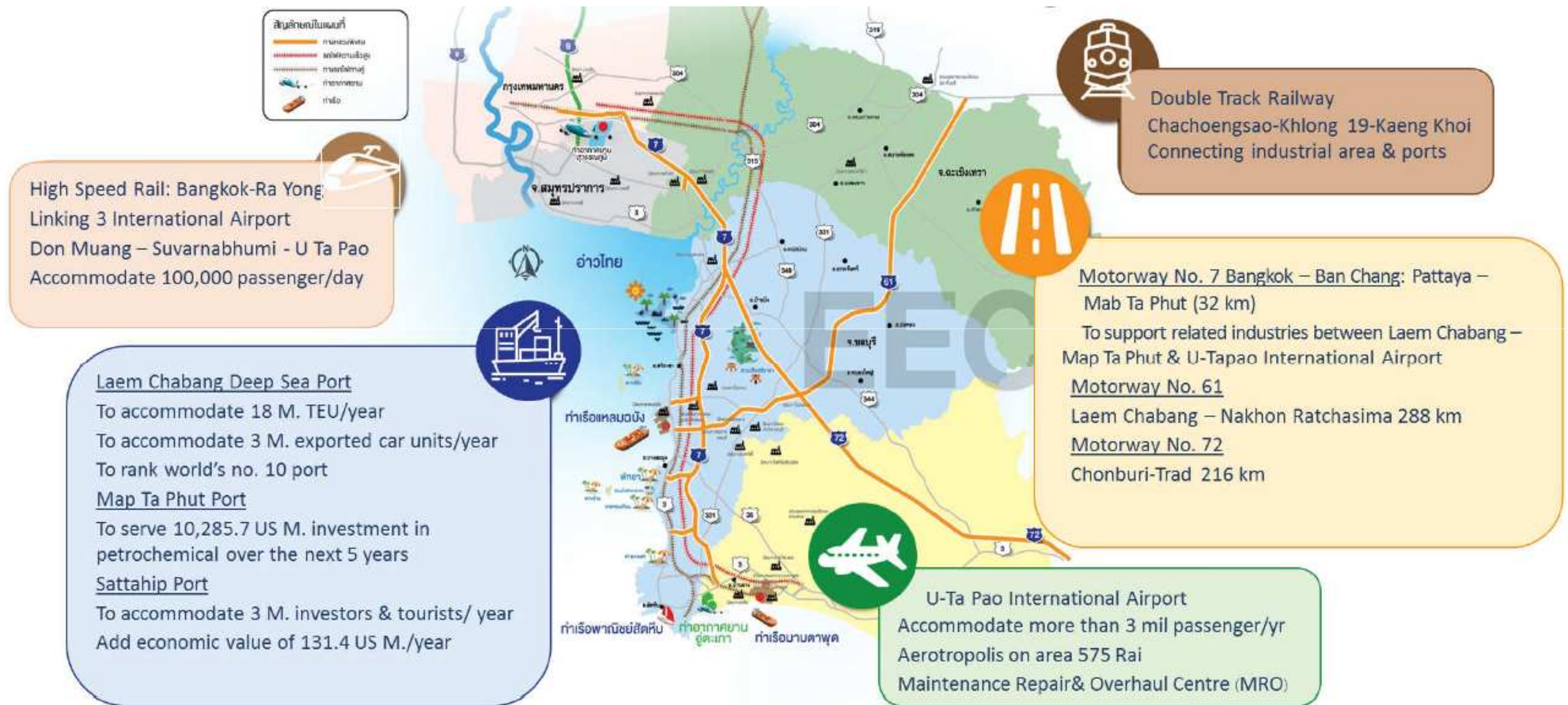
CLMVT
242 million Consumers
Within **1,000** KM

ASEAN
645 million Consumers
Within **3,000** KM

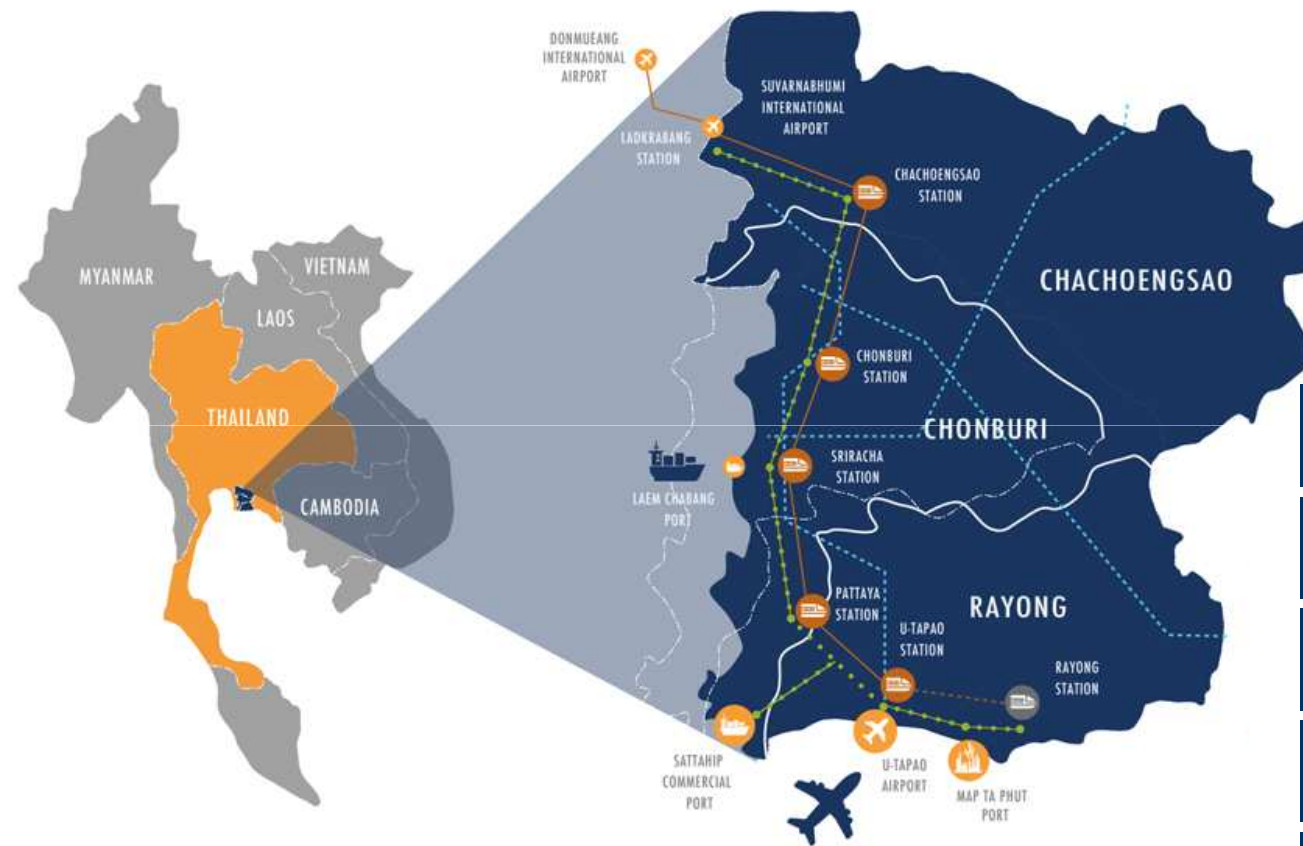
ASIA
4.6 billion Consumers
Within **5,000** KM

Source: World Bank Data 2018

Thailand's Infrastructure Development Strategy (2015-2022)



Connectivity and Infrastructure: Key Infrastructure Projects in Eastern Economic Corridor (EEC)



**The High Speed Rail
Linking 3 Airports**



**U-Tapao International
Airport**



TG MRO Campus



**Map Ta Phut Industrial
Port Phase 3**



**Laem Chabang Port
Phase 3**



Expected Operation

2023

State Railway of Thailand

2023

Royal Thai Navy

2022

Thai Airways International PCL

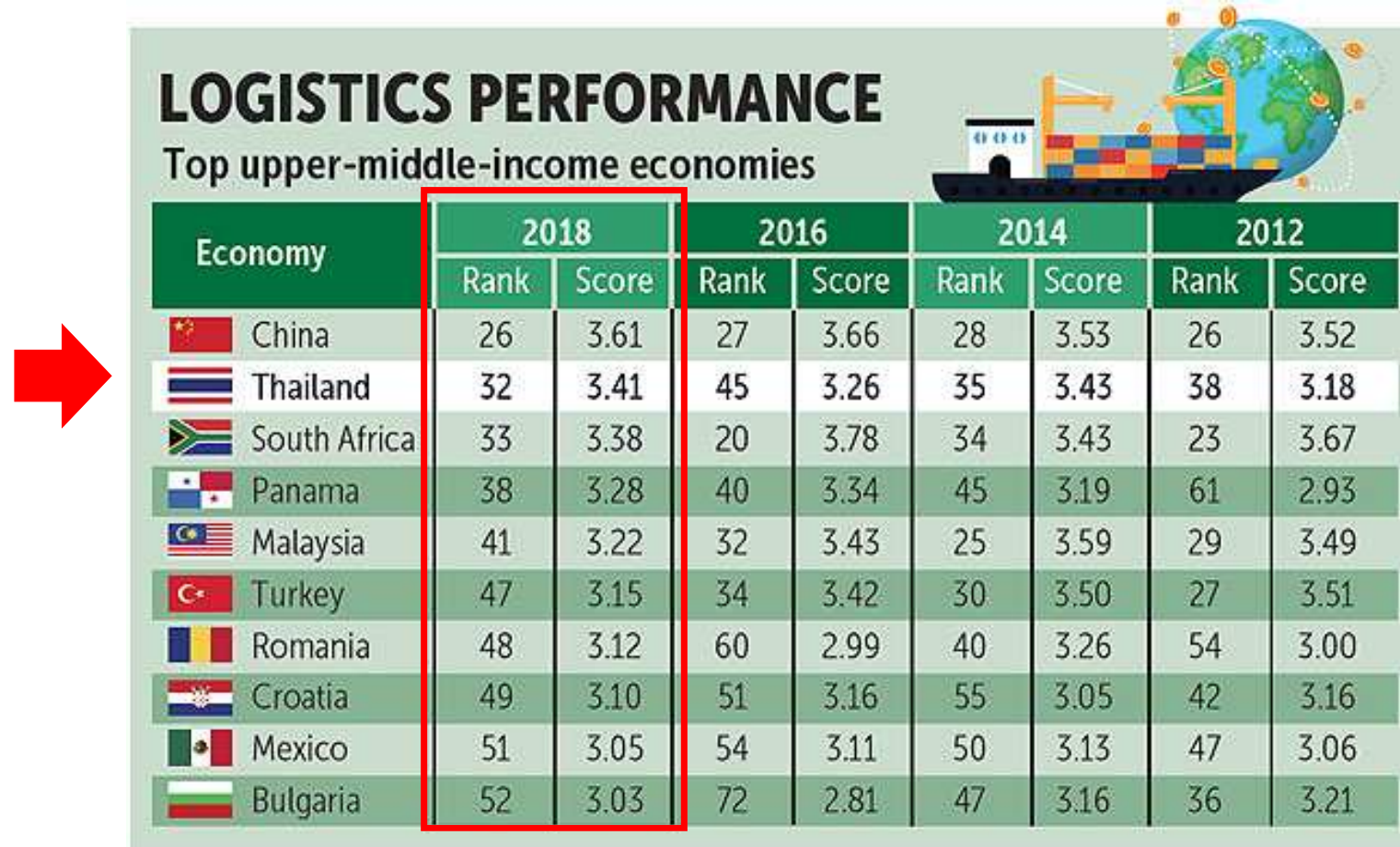
2025

Industrial Estate Authority of
Thailand

2023

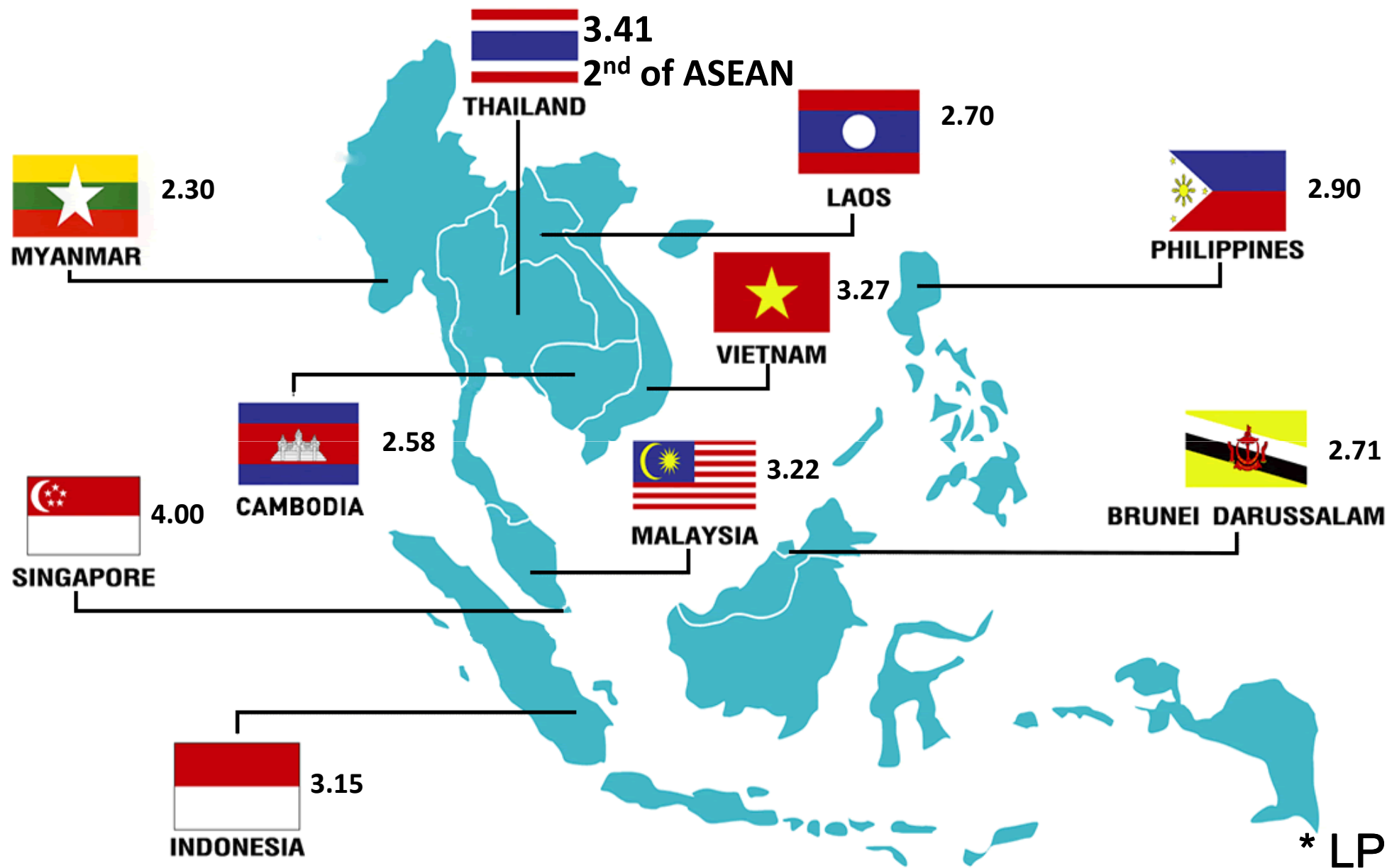
Port Authority of Thailand

Thailand surges 13 spots in World Bank logistics index



Source: World Bank

BANGKOK POST GRAPHICS



* LPI SCO

Investment Opportunities in Thailand

Strong Supply Chain: **Automotive**



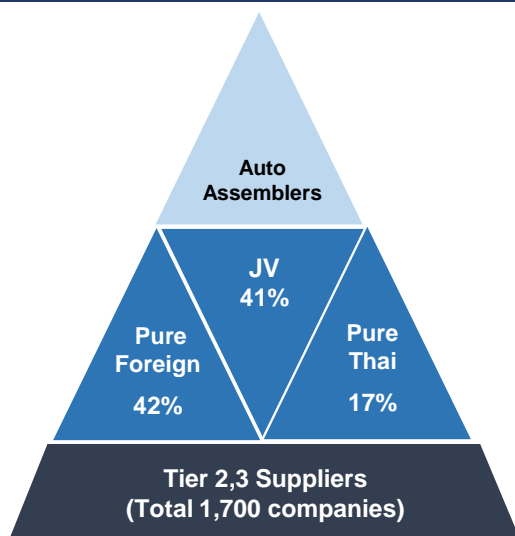
1st Automotive Producer
in ASEAN



12th Automotive Producer
in the World



Thailand Automotive Structure



Assemblers: (18 car makers and 8 motorcycle makers)

Motorcycle
(8 companies,
8 factories)

Passenger & Pick-up
(18 companies,
24 factories)

Vehicles Assemblers
(100,000 workers)

Dealer and Service Center
(200,000 workers)

Tier 1 Suppliers: (476 auto part companies)

Vehicle Parts

Vehicle & Motorcycle Parts

Engines, Drivetrains, Steering, Suspensions, Brake Wheels,
Tires, Bodyworks, Interiors, Electronics and Electric systems.

Tier 2,3 Suppliers: (1,700 companies)

SME
(Local Suppliers)
(1,700 companies)

Stamping, plastics, rubber, machining, casting, forging, function, electrical, trimming

Strong Supply Chain: Petrochemicals



1st Petrochemical Producer in ASEAN



16th Polyethylene Producer in the World

Exploration & Production



453 Sites

Infrastructure



Feedstock

OIL & GAS
Refining, Marketing & Distribution



Upstream, Intermediate and Downstream

UPSTREAM AND INTERMEDIATE PETROCHEMICALS











DOWNSTREAM PETROCHEMICALS



Easy Market Access: Domestic Market

Digital Lifestyle Thai Population

| | | | |
|--------------------|--|------------------|--|
| Internet users |  47 Million Source : NBTC , 2018 | E-payment |  US\$3.09 Trillion Source : Bank of Thailand, 2018 |
| Mobile subscribers |  83.6 Million Source : NBTC, 2018 | E-commerce |  US\$101.54 Billion Source : ETDA, 2018 |
| Line users |  44 Million Source : Thumsup.com; LINE, May 2019 | Internet banking |  <ul style="list-style-type: none"> • 23,125,388 Accounts • US\$203,932.95 Million transaction amount Source: Bank of Thailand, 2018 |
| Facebook users |  52 Million Source : brandbuffet.com, Jan 2018 | Mobile banking |  <ul style="list-style-type: none"> • 37,973,421 Accounts • US\$117,375.89 Million transaction amount Source: Bank of Thailand, 2018 |

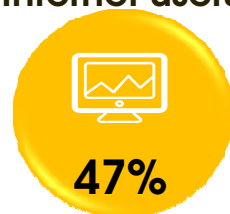
Digital Growth Trends 2018

Source : NBTC, Dec 2018, US\$ = 31.02 THB as of 23 July 2019

Number of active.



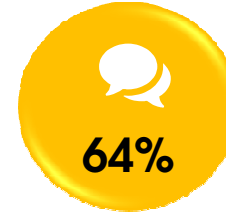
Internet users



Social media users



Mobile social media users



Mobile subscriptions



Easy Market Access: **Regional and International Market**

Thailand has implemented **13 Free Trade Agreements (FTAs)**, enabling businesses in Thailand to earn the rewards of almost tariff-free trade with **18 different nations**.



UNDER NEGOTIATION **RCEP**



Chile

Strong Startup Ecosystem



Quality of Life



STANDARD OF LIVING AT THE RIGHT COST

Ranking of Thailand among its top 21st best country in the world for expatriate.

LIVABLE COMMUNITY

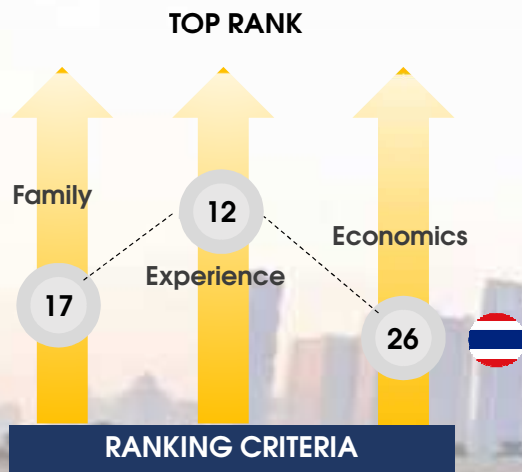


2nd best city for finance and housing for expats.

75% are satisfied with the financial situation, 17 percentage points more than global average (58%).

166

INTERNATIONAL SCHOOLS IN THAILAND



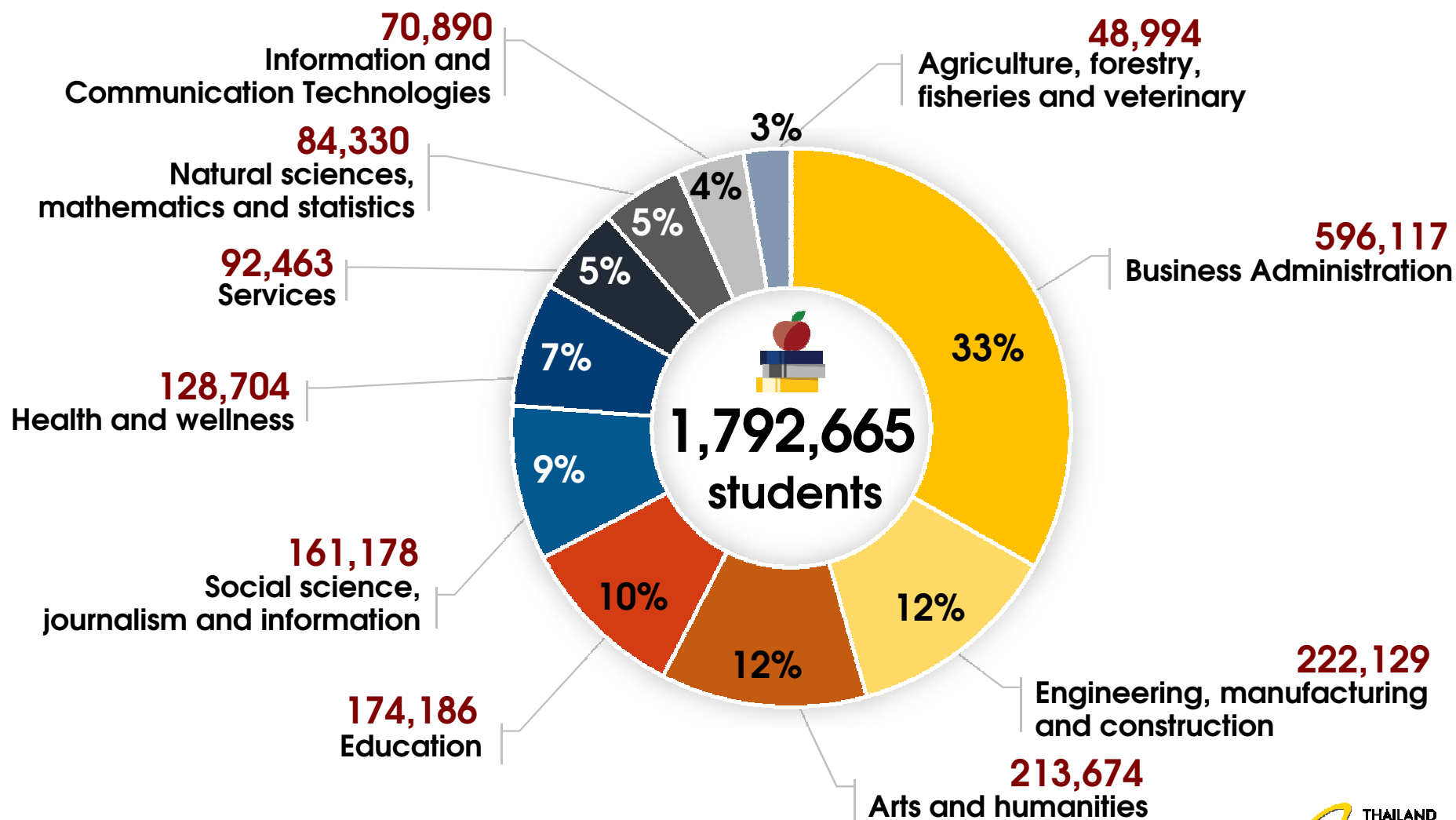
AFFORDABLE & HIGH-QUALITY HEALTH CARE FACILITIES

Well-positioned to be the medical hub of Asia.

Outstanding medical Services

Various internationally accredited medical facilities.

Quality Workforce: Higher Education Statistics 2018



Strong Government Support - Ease of Doing Business

Thai government is committed to improving laws and regulations to meet international standards, promoting trade facilitation and ensuring consistency.



Prior to the Reform

27.5 days to set up
business in Thailand



After to the Reform

4.5 days to set up
business in Thailand



| | 2017 | Change in Rank | 2018 |
|--|---------------------------------|----------------|---------------------------------|
| | 72.53 46th | | 26th 77.44 |



Starting a Business

78th 36th



Getting Electricity

37th 13th



Getting Credit

82nd 42nd



Protecting Minority Investors

27th 16th



Paying Taxes

109th 67th



Enforcing Contracts

51st 34th

Introduction to **Thailand Board of Investment**



BOI is a government agency
under the Office
of the Prime Minister

Investment Tax Incentives

(under the revised Investment Promotion Act 2017)

- ☑ Corporate income tax exemption
- ☑ 50% reduction of corporate income tax after the expiry of tax exemption period (for projects in investment promotion zones only)
- ☑ 50% reduction of corporate income tax
- ☑ Investment tax allowance
- ☑ Double deduction of public utilities
- ☑ 25% Deduction of qualified infrastructure costs
- ☑ Exemption of import duties on machinery
- ☑ Exemption of import duties on raw materials used in the manufacture of exports
- ☑ Exemption of import duties on materials used for R&D purposes



SMART VISA (Launched February 1, 2018)

Taking Thailand to New Heights with Foreign Talents and Technologies



Privileges for SMART Visa



Sample of German Investment in Thailand



ZF Lemforder



BOSCH



Bayer



Leistritz



SIEMENS



MAHLE

KNAUF



- Thank you -



www.boi.go.th