

ASEAN-Japan Economic Co-Creation Forum 2024 “Next Generation Vehicle”



Parinya Ketkam

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The Thai Auto-Parts Manufacturers Association (TAPMA)



Mr. Sompol Tanadumrongsak

President



The Thai Auto-Parts Manufacturers Association (TAPMA)

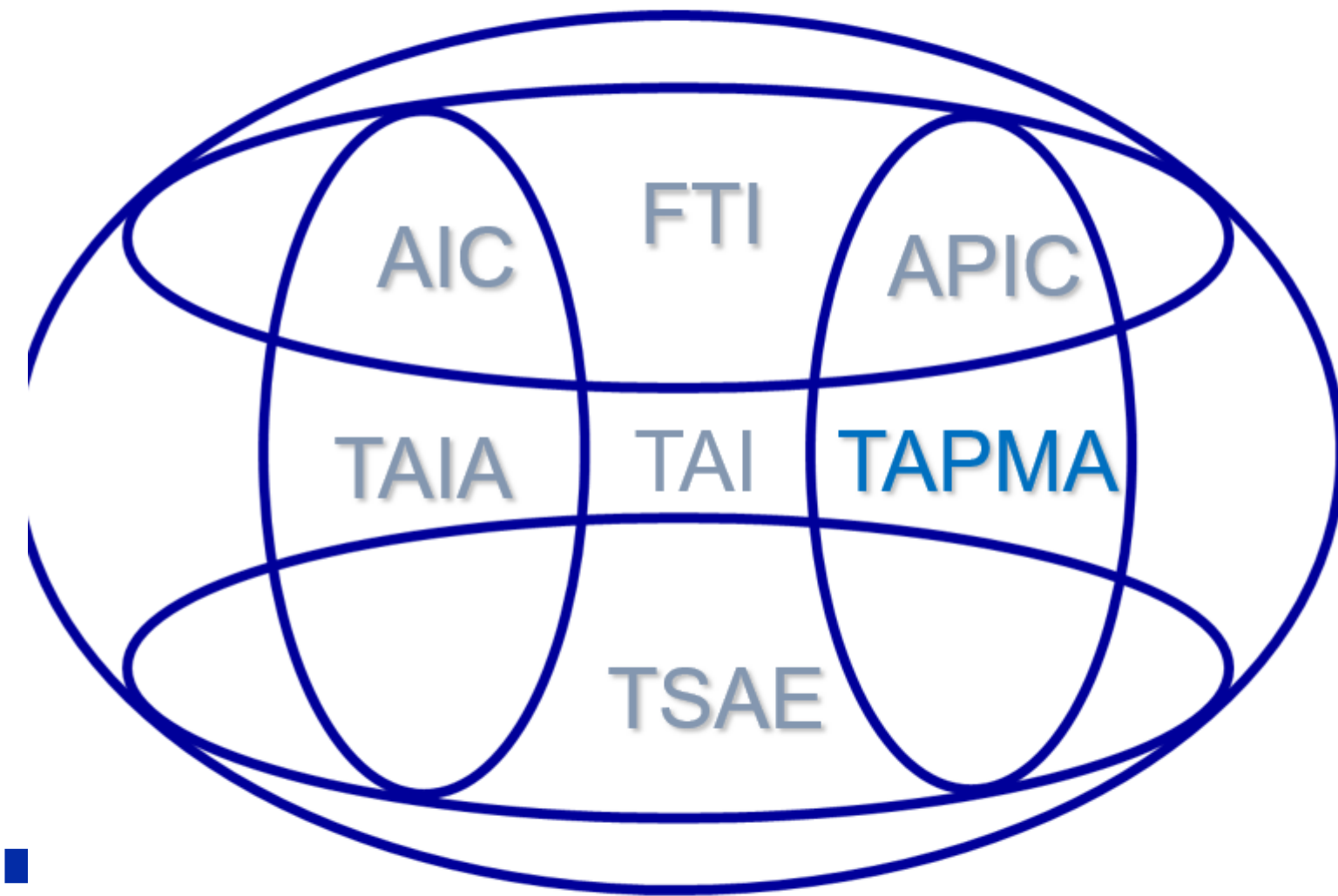
was created with approval by the Ministry of Commerce June 29, 1978.

It is a union of auto parts manufacturing companies from the private sector to serve as the central voice for auto parts industrialists in the country in order to support development of Thai autoparts industries as well as ASEAN supply chain.

TAPMA was also created to detect and address problems that hinder the automobile industry's development in terms of production technology efficiencies, raw material import difficulties and workforce challenges, especially attracting and developing skilled laborers and engineers.

Presently TAPMA is entrusted by the government and about 660 members to represent the automobile parts industry and elevate the country's industry to greater heights.

Supporting Agencies



Federation of Thai Industry (FTI)

- Automotive Industry Club (AIC)
- Auto Parts Industry Club (APIC)

Association

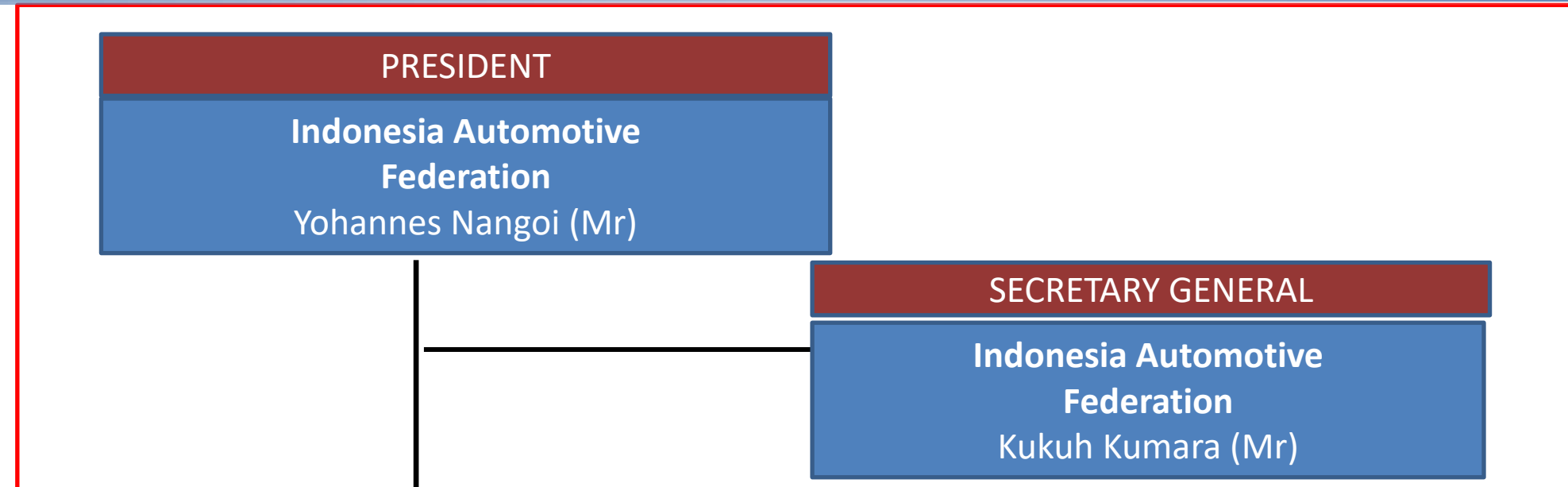
- The Thai Automotive Industry Association (TAIA)
- Thai Auto-parts Manufacturer Association (TAPMA)
- Society of Automotive Engineers Thailand (TSAE)

MOI

- Thai Automotive Institute (TAI)

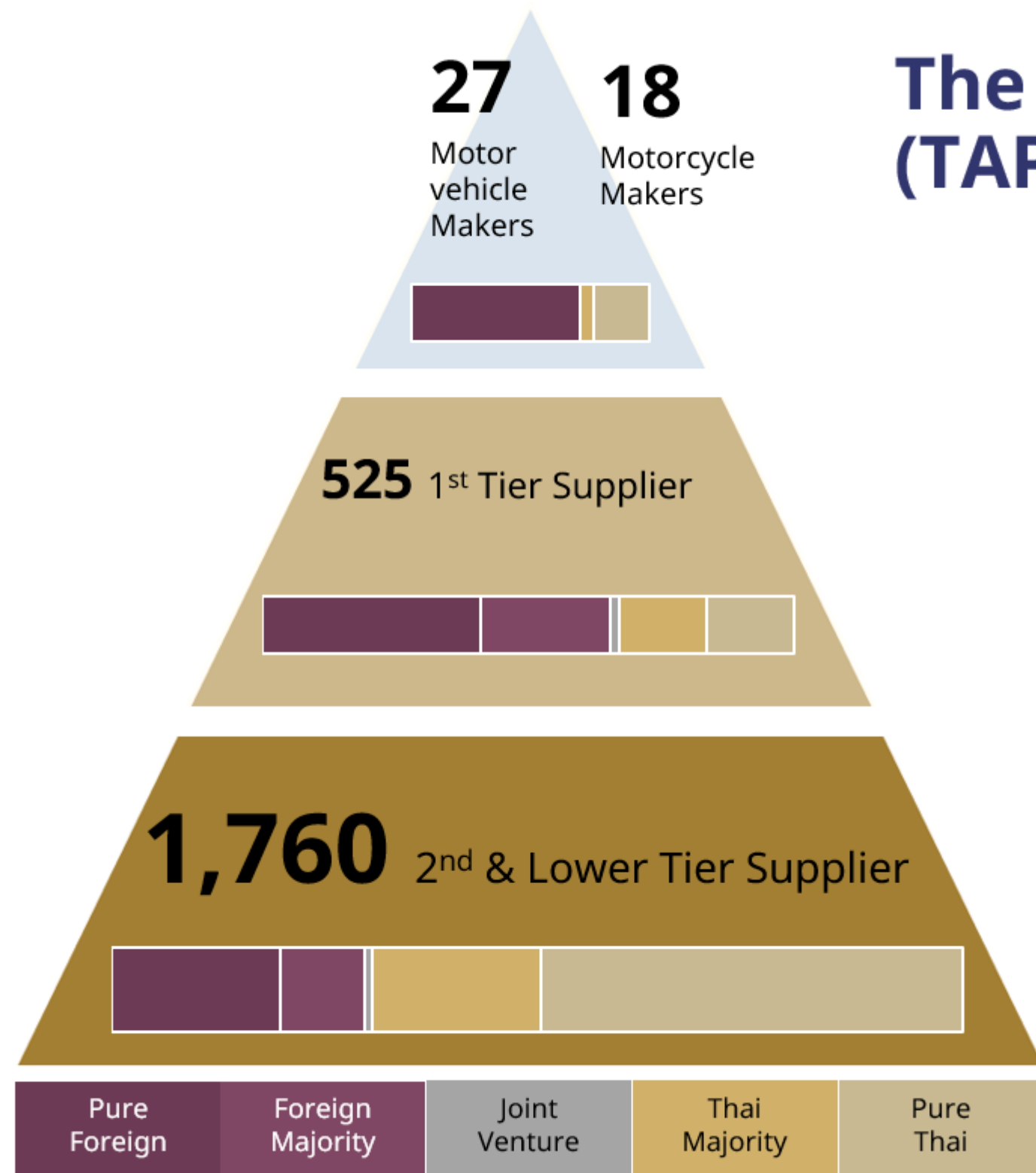


AAF Council 2024-2025



<p>VICE PRESIDENT</p> <p>Brunei Automobile Traders Association</p> <p>Tang Chee Kiong (Mr)</p>	<p>VICE PRESIDENT</p> <p>Automotive Federation Malaysia</p> <p>Mohd Shamsor Mohd Zain (Mr)</p>	<p>VICE PRESIDENT</p> <p>Thai Automotive Industry Association</p> <p>Suwat Supakandechakul (Mr)</p>
<p>VICE PRESIDENT</p> <p>Motor Traders Association of Singapore</p> <p>Glenn Tan (Mr)</p>	<p>VICE PRESIDENT</p> <p>Automotive Association of Myanmar</p> <p>Aung Win (Mr)</p>	<p>VICE PRESIDENT</p> <p>Federation of Automotive Industries of the Philippines</p> <p>Vincente T. Mills, Jr. (Mr)</p>
<p>VICE PRESIDENT</p> <p>Lao Automotive Industry Association</p> <p>Saneu Chounramany (Mr)</p>	<p>VICE PRESIDENT</p> <p>Vietnam Automobile Manufacturer's Association</p> <p>Nguyen Trung Hieu (Mr)</p>	<p>VICE PRESIDENT</p> <p>Cambodia Automotive Industry Federation</p> <p>Oknha (Datuk) Ngov Leang Houth (Mr)</p>

Overview of automotive industry and automotive parts.



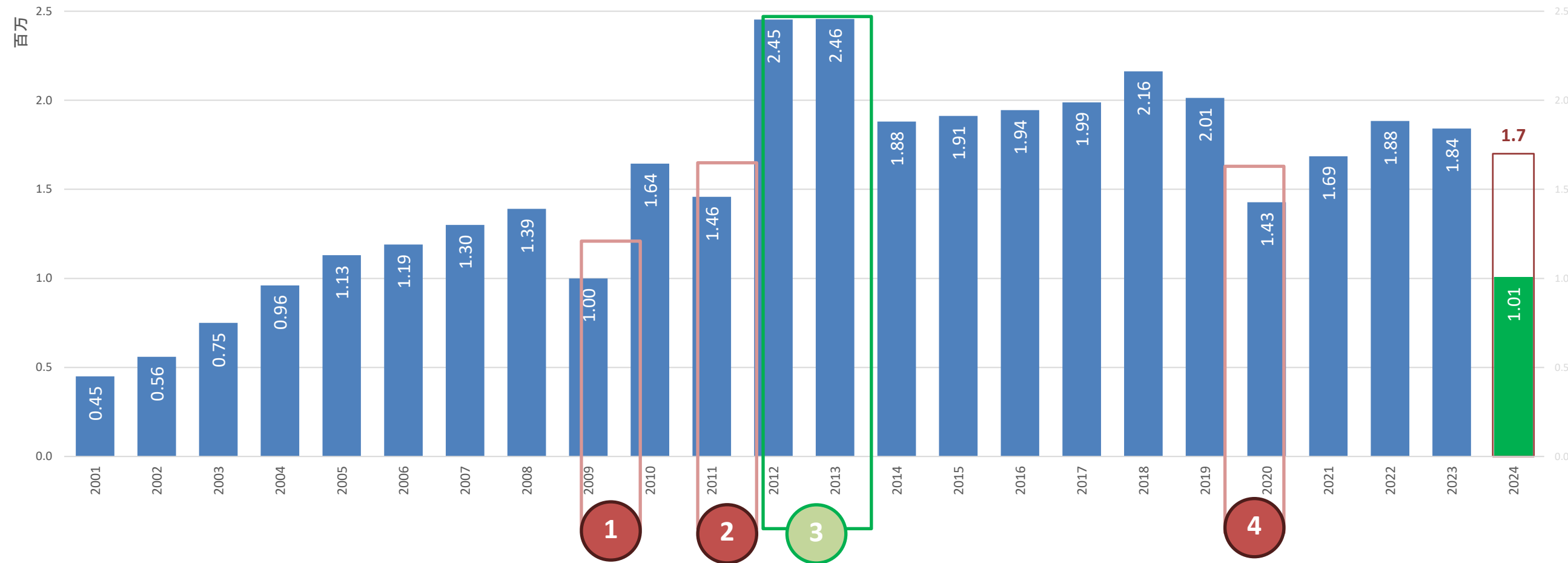
The Thai Auto-Parts Manufacturers Association (TAPMA)

- **Thai automotive industry** is structured in pyramid with car makers on top and auto parts makers in lower layers by deliveries.
- **27** motor vehicle makers and **18** motorcycle makers. Over 90% of which are owned by multinationals.
- **525** suppliers in 1st tier. About 65% of which are majority owned by foreigners.
- **1,760** suppliers in 2nd & lower tiers. About 70% of which are Thai owned.

Data source from Thailand Automotive Institute, 2022

Overview of automotive industry and automotive parts.

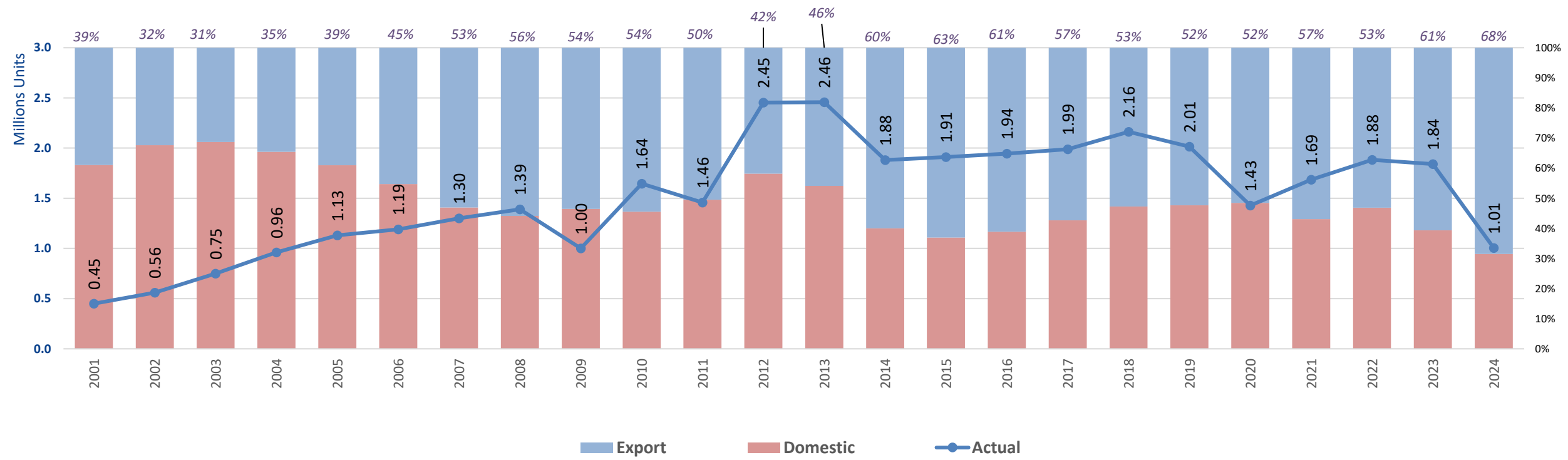
Thailand Car Performance



1. Hamburger crisis
2. Thailand floods
3. First-car scheme
4. COVID-19 pandemic

Production volume of January - Sep 2024 decreased by **17%** from the same period of the previous year.

Jan – Sep 2023 = 1,221,878 Units
 Jan – Sep 2024 = 1,005,749 Units



Production volume 2023-2024

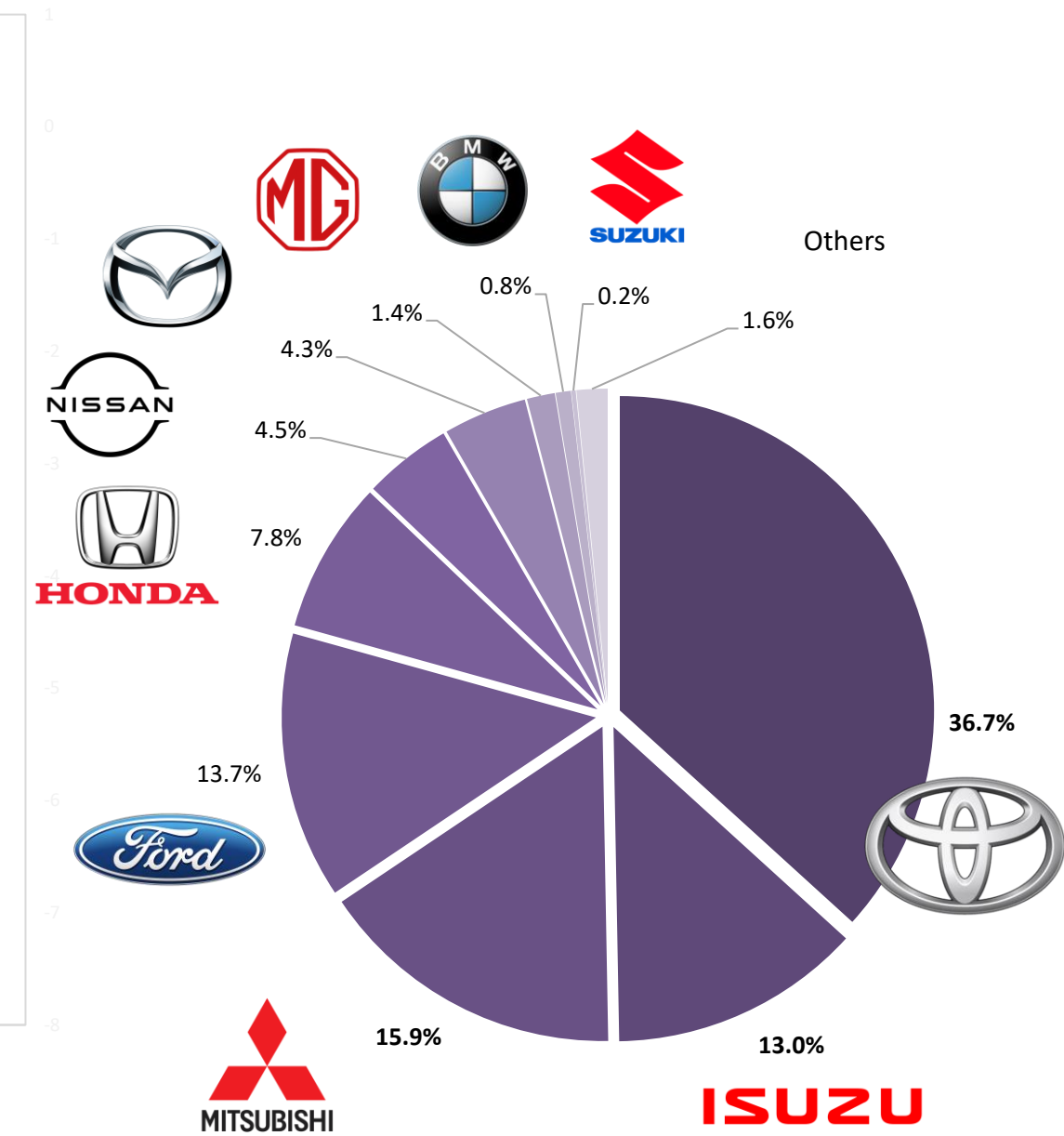
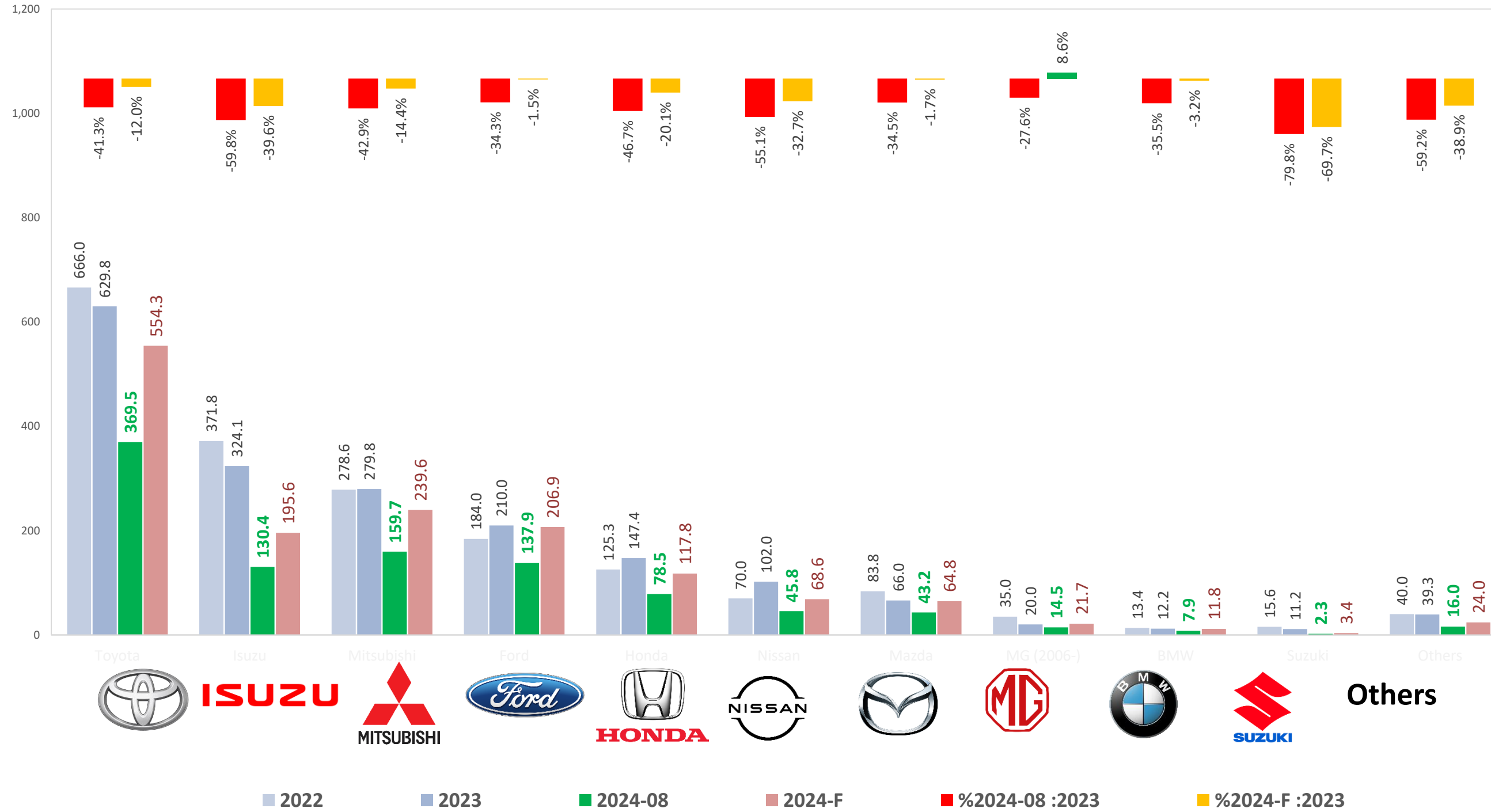
- Year 2023 will be 1.84 Million units.
(Less domestic sales from household Debt)
- **Year 2024** forecasted to be 1.70 M units.
(-7.73 % as Y23)

data by The Federation of Thai Industries (FTI)

Overview of automotive industry and automotive parts.



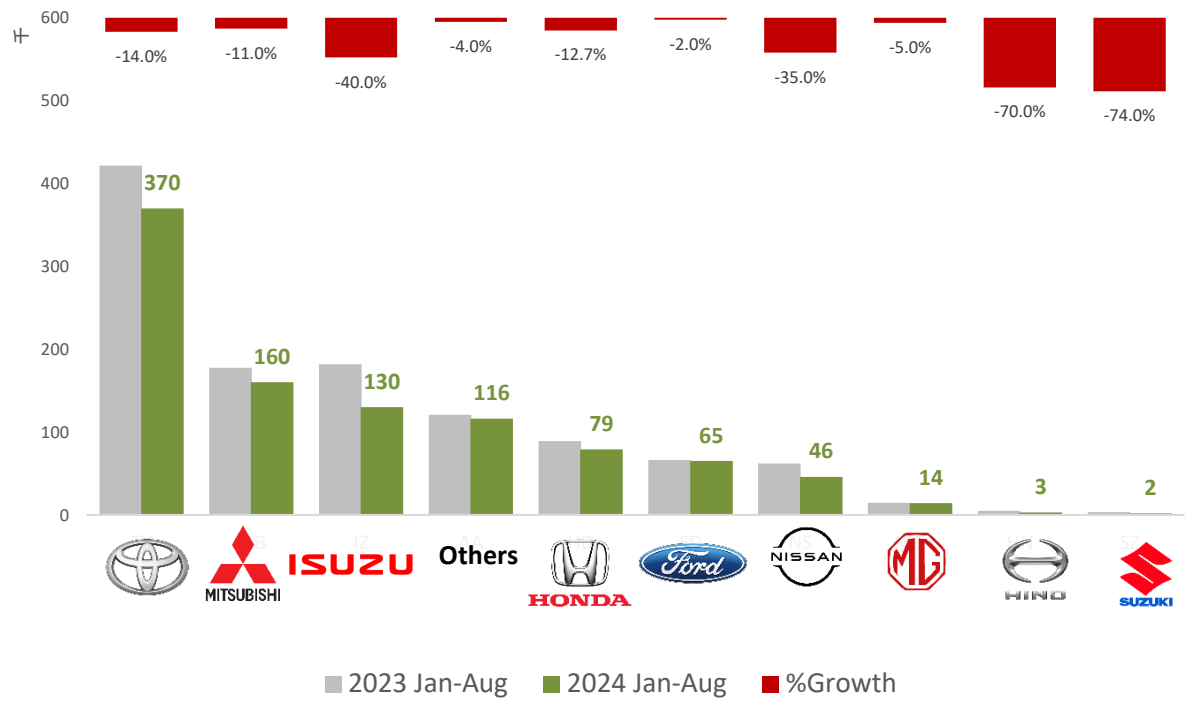
Thailand Production Performance (Thousands Units)



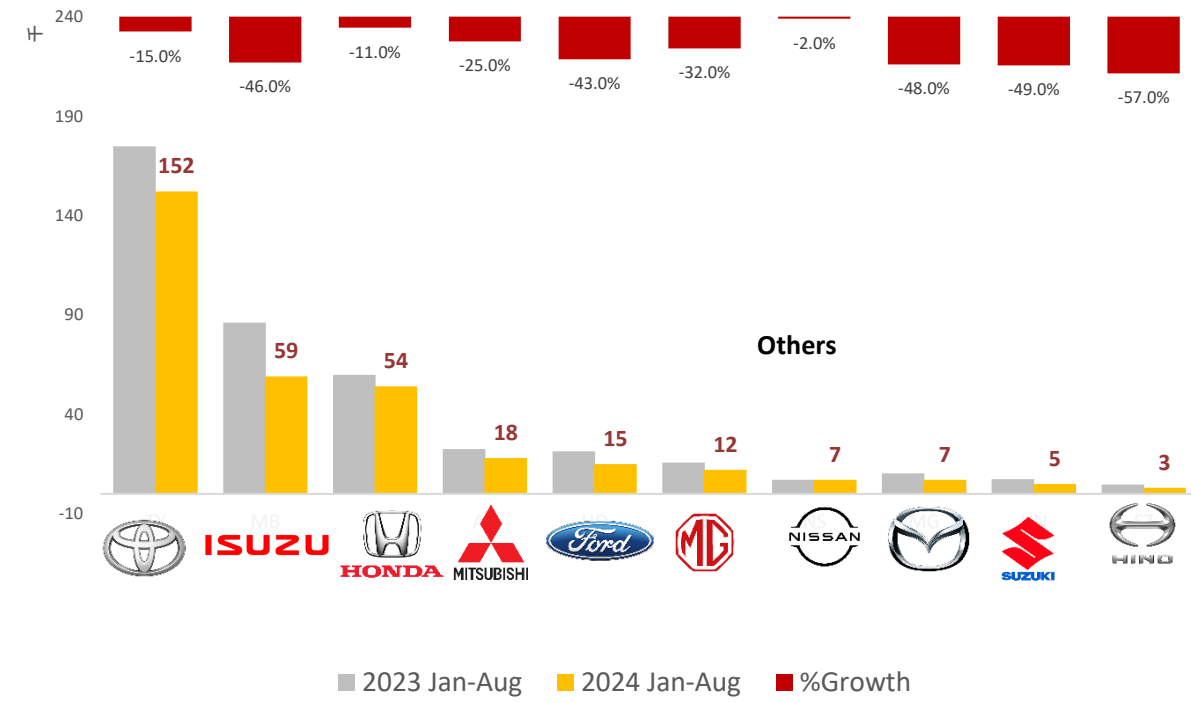
Overview of automotive industry and automotive parts.

Thailand Car Performance

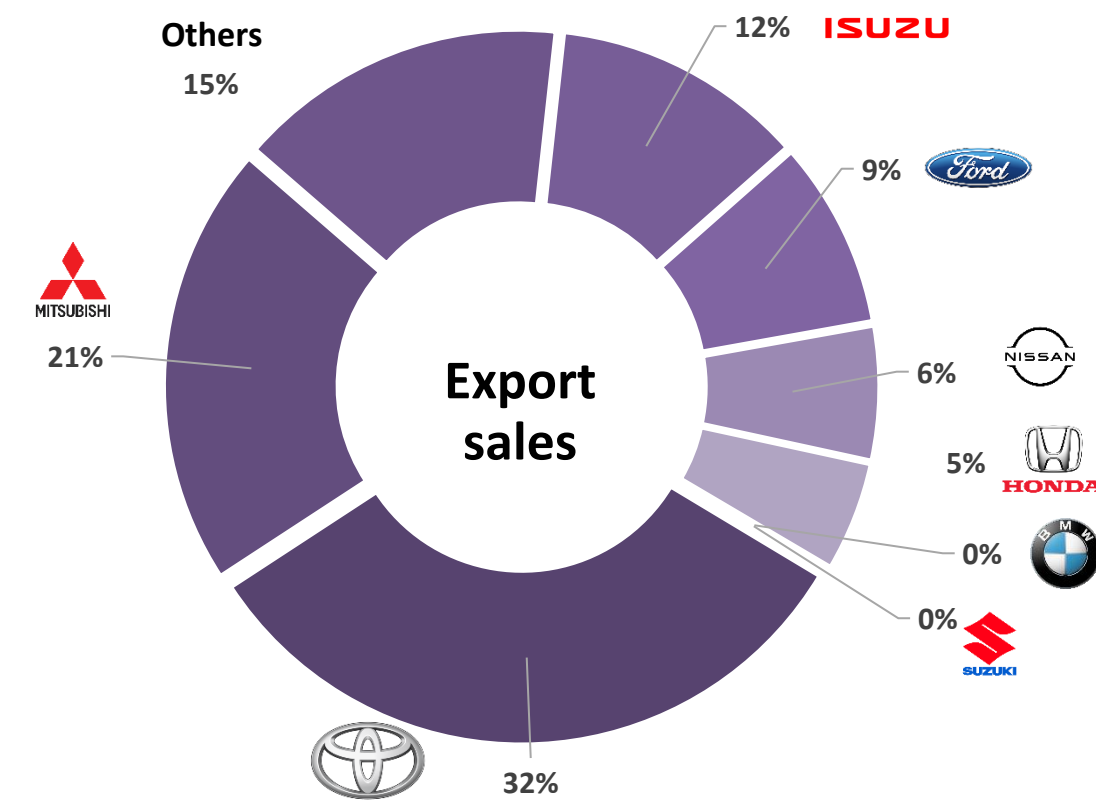
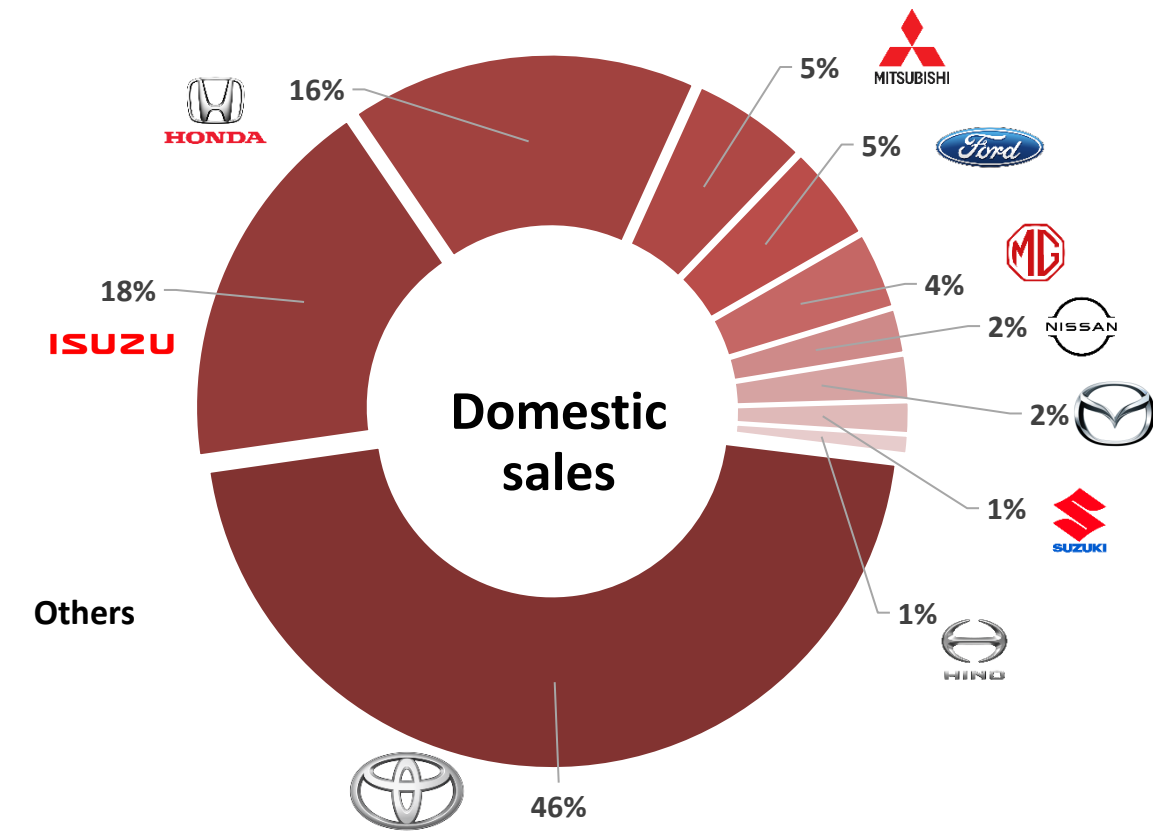
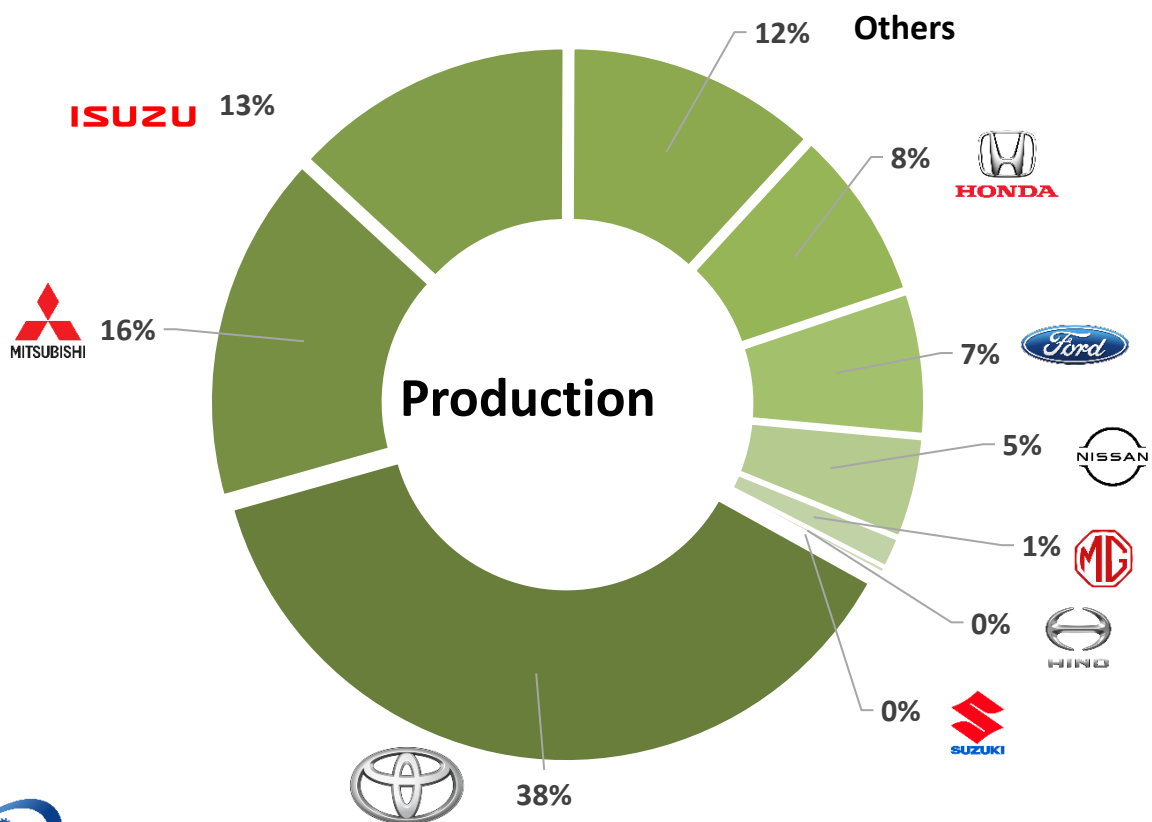
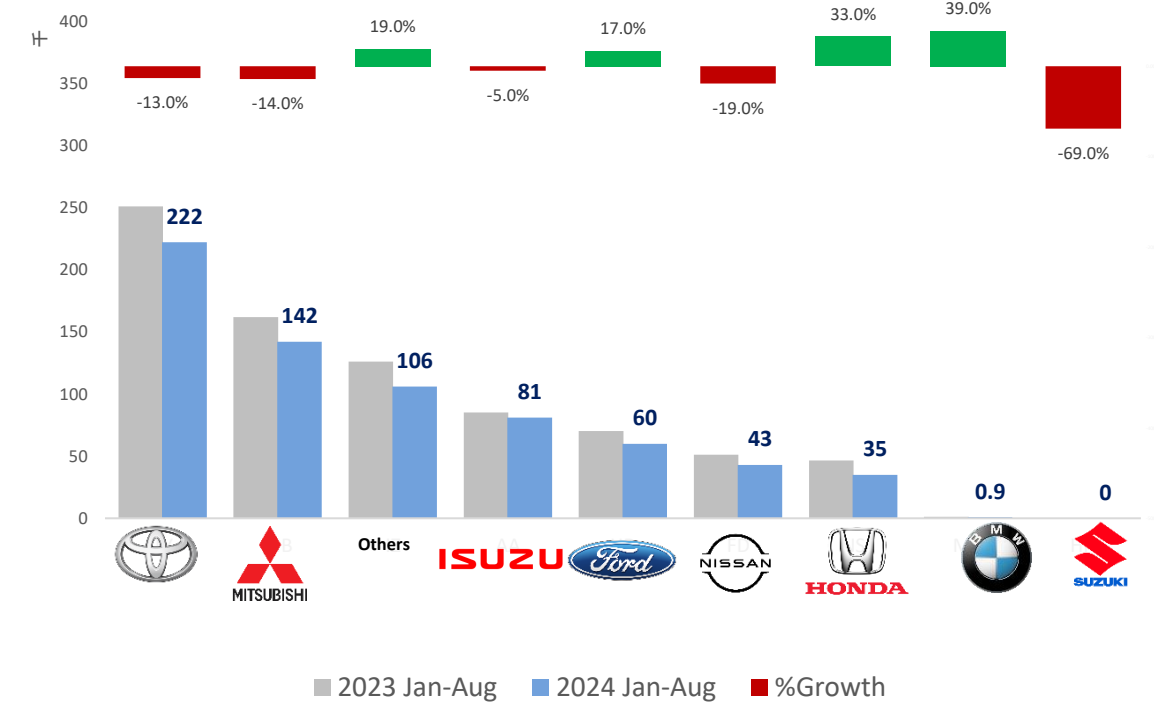
Production by Brand



Domestic Sales by Brand



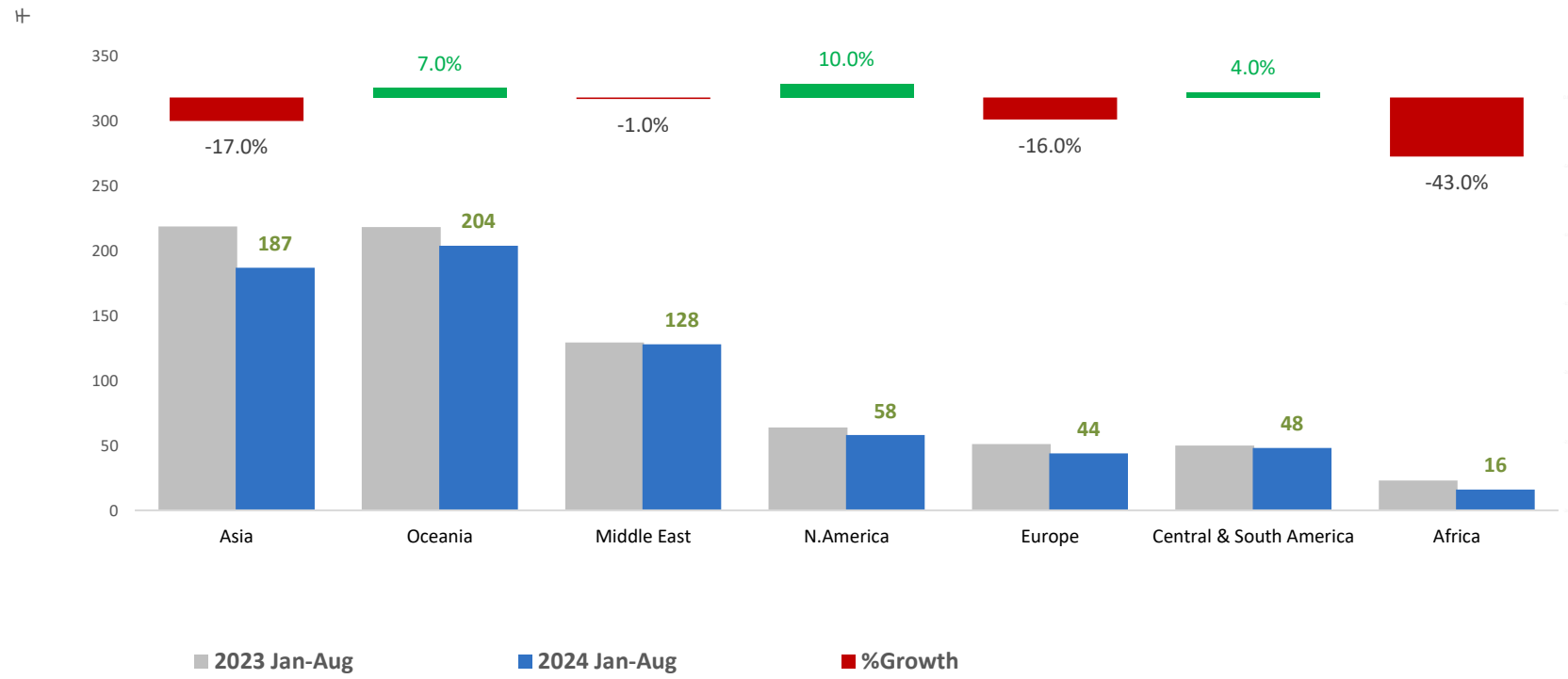
Export Sales by Brand



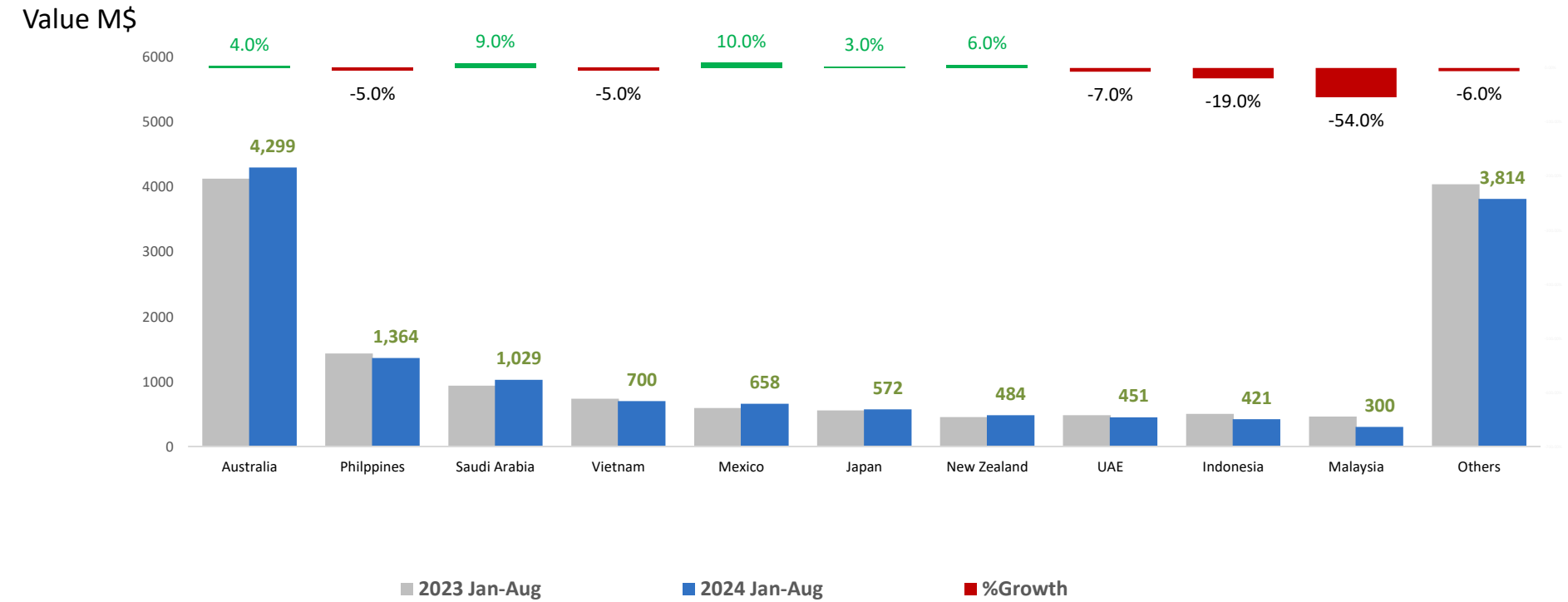
Overview of automotive industry and automotive parts.

Thailand Car Performance

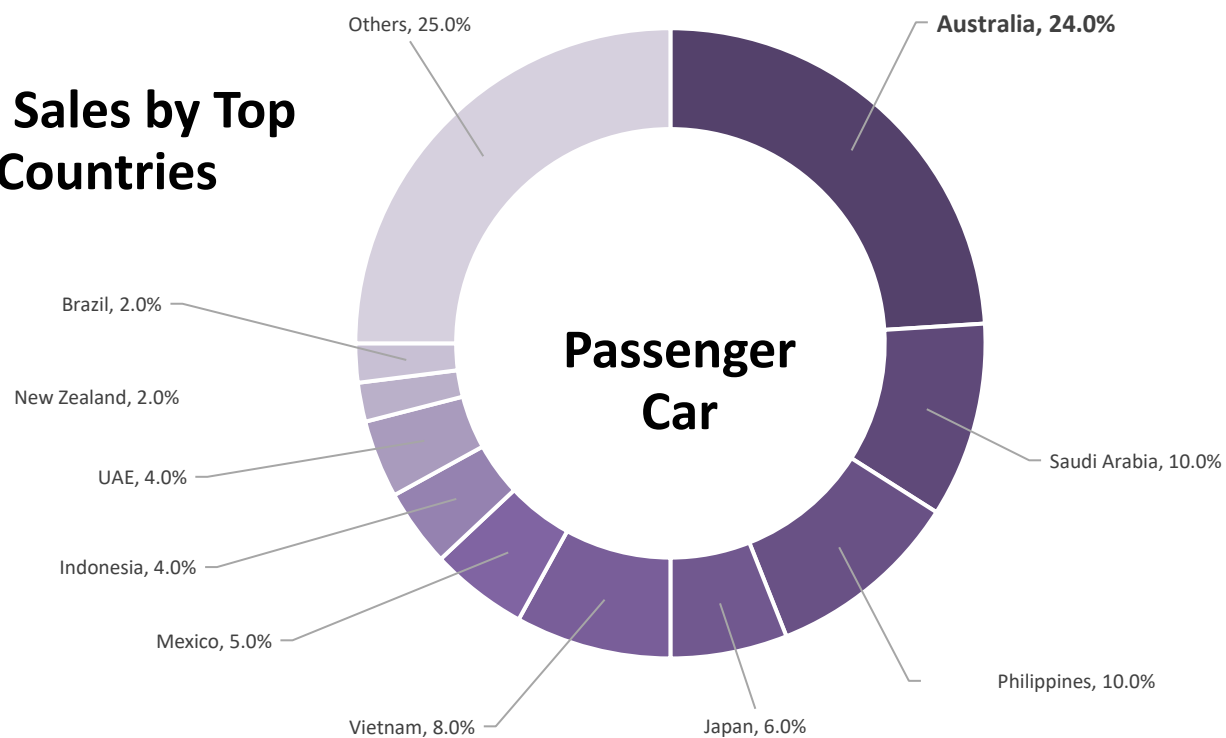
Export Sale by Region



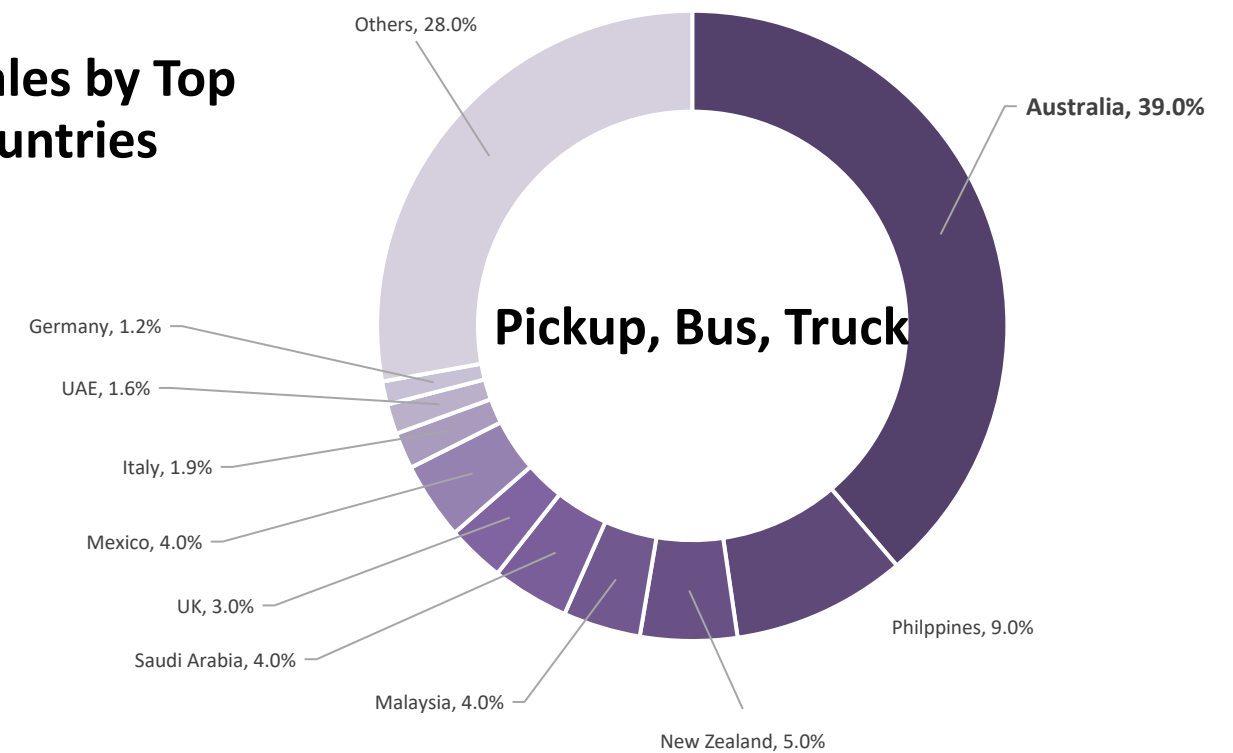
Export Sale by Country



Export Sales by Top 10 Countries



Export Sales by Top 10 Countries



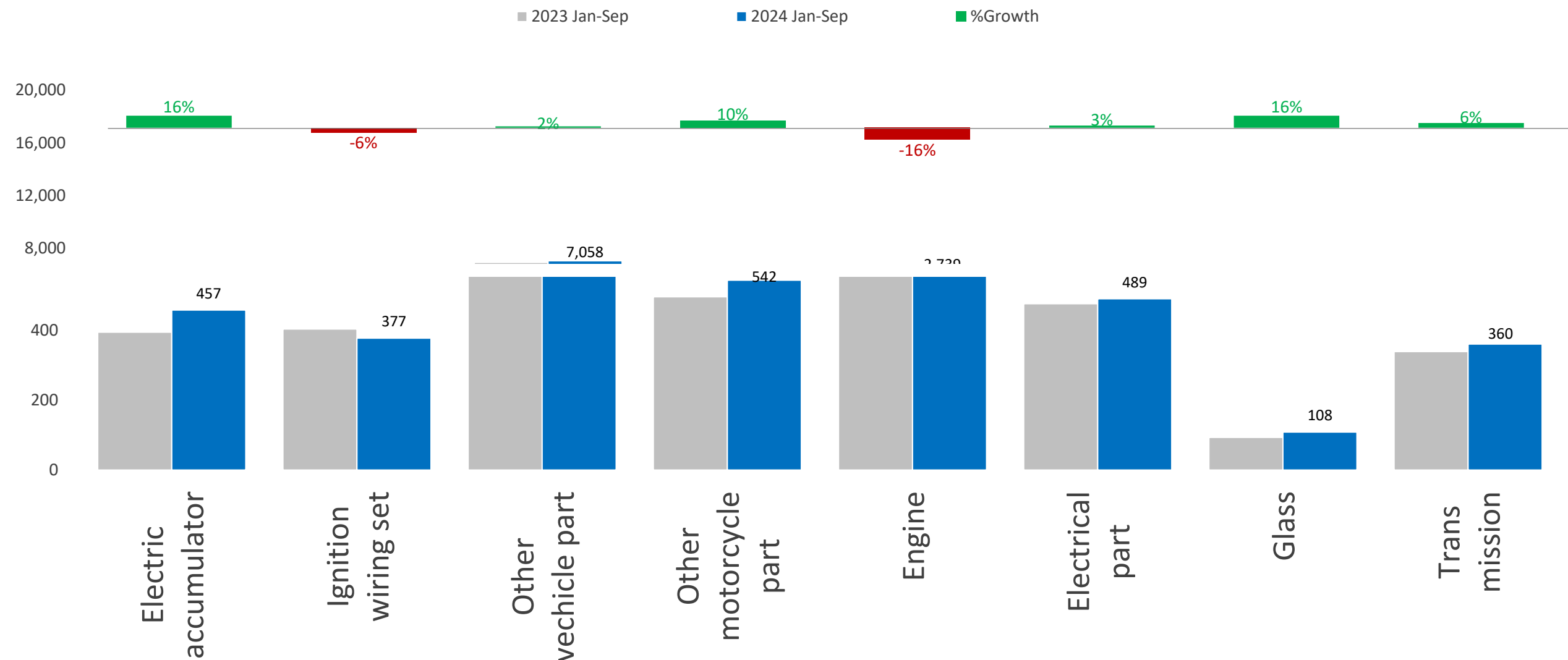
THAILAND AUTO PARTS PERFORMANCE

- **Thailand Auto Parts Performance (TAPMA Code) Jan-Sep 2024**

The total **Export** value is \$ **17,749.8** millions **(+0.3% of Y'2023 From 17,691.6)**

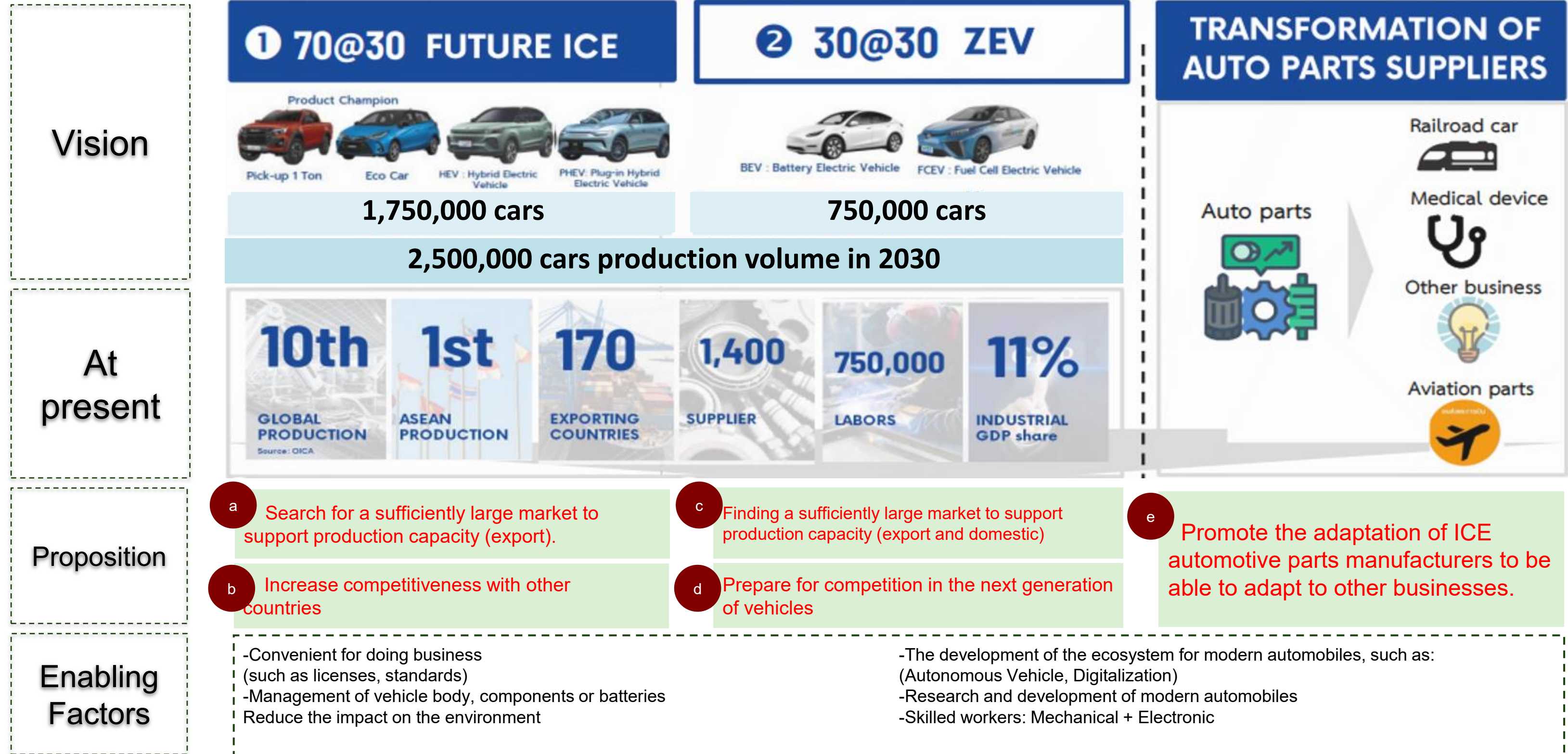
Export by Category

Value (M\$)



Thailand's Automotive Industry Vision 2030

Strong global production hub with industry transformation



THANK YOU

Collaboration today for a better tomorrow.



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