



# タイのEV振興政策の動向 タイ工業省

## Trends in EV Policy

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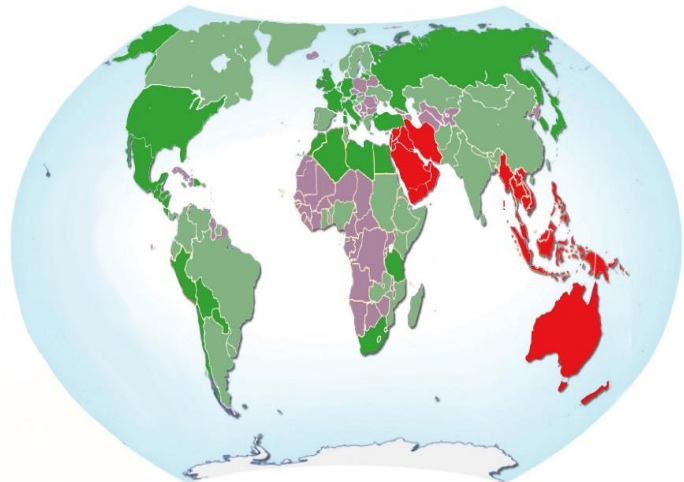
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Office of Industrial Economics

21 February 2024

# Development of Thailand Automotive Industry

## Strong Position :

- **Production Base**
- Sustainable Mobility :  
“Clean-Efficient-Safe” Vehicles
- Export to more than **170 countries** around the World



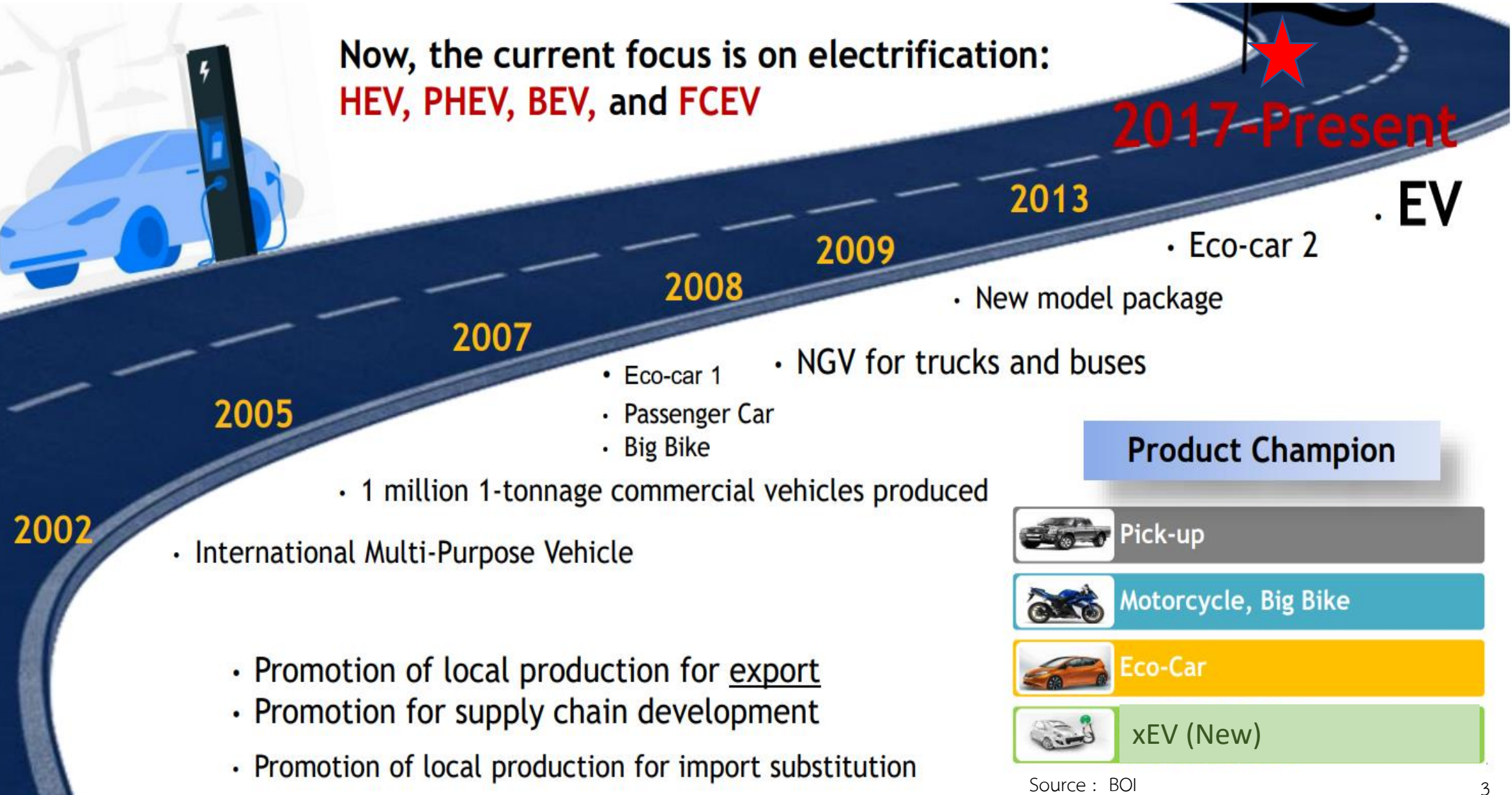
6 Car Makers	ECO Car 1		ECO Car 2	
	Investment (Million Baht)	Capacity (Unit/Year)	Investment (Million Baht)	Capacity (Unit/Year)
Nissan	5,550	120,000	6,860	123,000
Honda	5,290	120,000	4,300	100,000
Suzuki	9,500	138,000	8,438	126,000
Mitsubishi	4,711	107,000	4,900	233,000
Toyota	4,642	100,000	10,406	100,000
AAT (Mazda)	-	-	8,400	158,000
<b>Total</b>	<b>29,693</b>	<b>585,000</b>	<b>43,304</b>	<b>840,000</b>

# Development of Thailand Automotive Industry



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Now, the current focus is on electrification:  
**HEV, PHEV, BEV, and FCEV**



Source : BOI

# National Electric Vehicle Committee (EV Board)

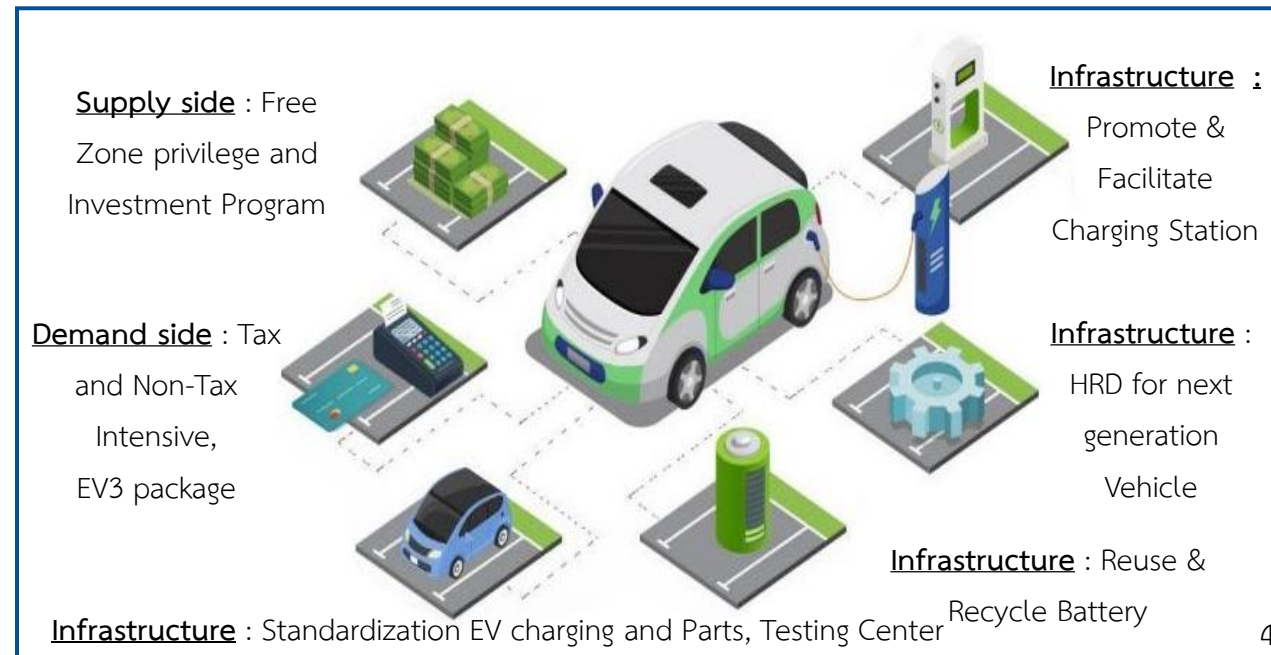


1. The National Electric Vehicle Policy Board (EV Board) meeting which was chaired by Mr. Srettha Thavisin, the Prime Minister, continued the commitment to propel Thailand into a prominent regional hub for the Electric Vehicle (EV) manufacturing aligning closely with the 30@30 policy.

## 2. ZEV target 30@30

Target	Type	(unit/year)	
		2025	2030
Production	Car/Pick-up	225,000 (10%)	725,000 ( <b>30%</b> )
	Motorcycle	360,000 (20%)	675,000 (30%)
	Bus/Truck	18,000 (33%)	34,000 (47%)
Infrastructure	Two-Wheel Charging Station	1,600	8,000
	Four-Wheel Fast Charging	2,200-4,000	12,000

## 3. Measures for development of EV



# Execution Results Next Generation Vehicle Investment in Thailand



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(Source: BOI Information Database (BIS) as of 31<sup>st</sup> January 2024)

81,723.1 MB. *	25 Projects **	844,495 Cars
HEV (30,224.8 MB.)	6 Projects (6 Entities)	305,955
PHEV (11,494.3 MB.)	7 Projects (7 Entities)	159,100
BEV (40,004.1 MB.)	18 Projects (17 Entities)	379,440

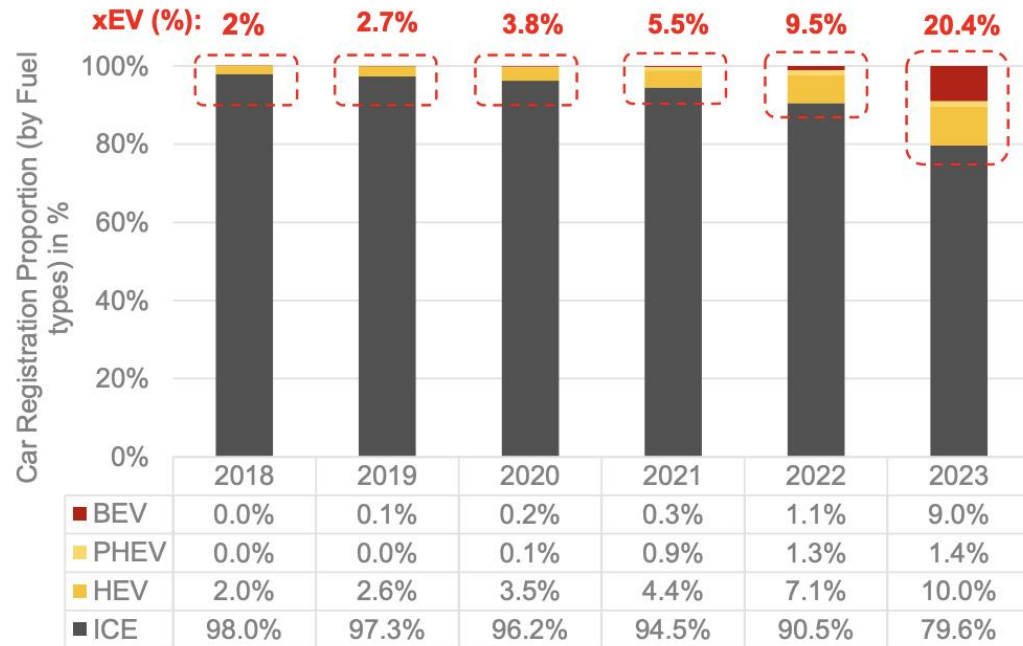
Promoted Projects ** 25	Certificate Issuance (Projects) 17	Commercialized Distribution (Brands) 11

- Remarks:
- \* Investment Values excluding Cost of Land and Working Capital
  - \*\* 18 Promoted Entities. 1 entity can be promoted more than 1 project. 1 project can be manufactured more than 1 type of the EVs.
  - Isuzu is promoted under the category of general automobile due to the limitation of complying with the conditions in category EV.



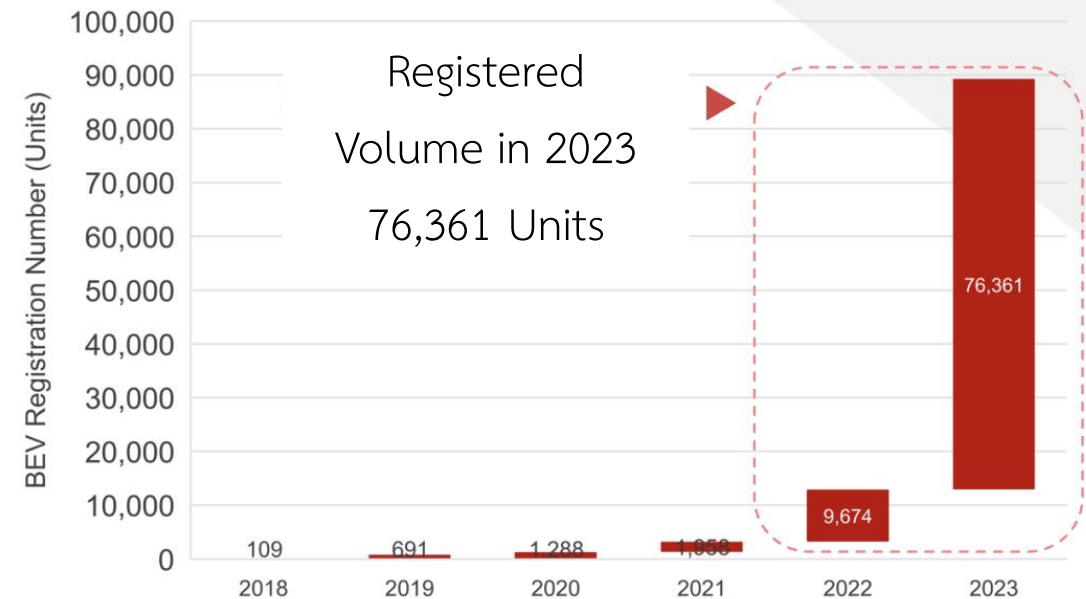
## Automotive Situation Recap. (Dec. 2023)

### PC and Pick-Up Registration Proportion By Fuel Types (2018-2023)



Remark: BEV Motor vehicle including Passenger Car and Pick-up  
Source: Department of land transport: DLT

### PC and Pick-Up BEV Registration Volume (2018-2023)



Source : TAI ,2024 support data by Department of Land Transport

# ASEAN-Japan Forum 2023



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ASEAN-Japan Economic  
Co-Creation Forum Toward  
Innovative and Sustainable  
Growth. December 16, 2023



**Prime Minister of Thailand** has attend the ASEAN-Japan Forum. As result of meeting with Japanese auto makers, BOI informed that 4 Japanese auto makers have plans to expand their investment in EV in Thailand, with an estimated investment value of 150 billion baht over next 5 years.





## Centre of Robotics Excellence (CoRE)

1. Developing System Integrator (SI) in workplaces more than 4,500 persons.
2. Developing robot prototypes and Automated systems, 185 prototypes.
3. There are 121 System Integrators (SIs) registered through the Center of Excellence mechanism.
4. 271 enterprises apply for investment promotion to develop their production processes by robotic and automation, with a total value of 27,710 million baht



# Related Industry Development : High Density Battery



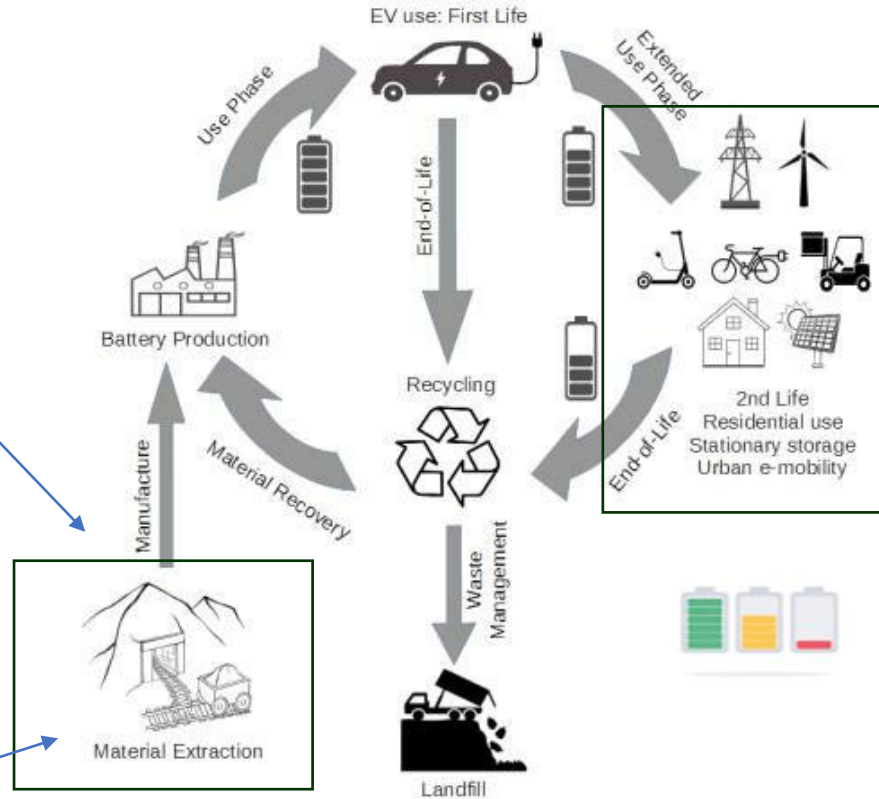
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Exploration and development of economic mineral resources (Upstream)



Recycle Battery (Downstream)



**Second-Life EV batteries**



Energy Storage System (ESS)



**Economic Analyses** \$

- Payback period
- Levelized cost of electricity
- Net present value

**Life Cycle Assessments**

- Battery-centered LCA
- Application-centered LCA



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## UNECE R 117



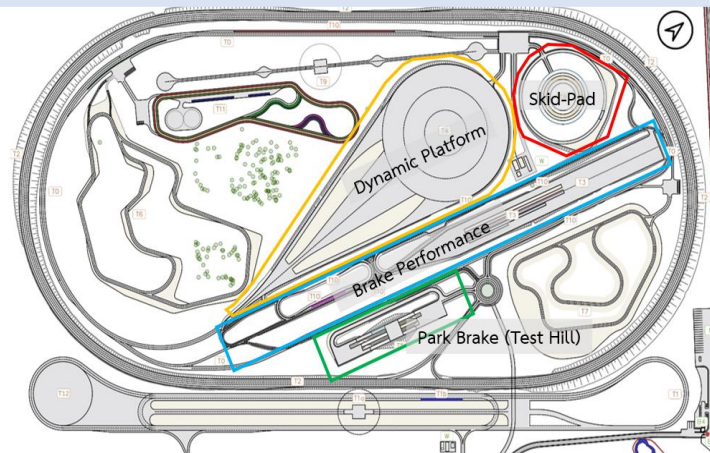
## Park Brake (Test Hill)



# ATTRIC

ศูนย์ทดสอบยานยนต์และยางล้อแห่งชาติ  
Automotive and Tyre Testing, Research and Innovation Center

## First in ASEAN



**\*\*\* Open Now\*\*\***

Testing Tyre  
(UN R117)

## Brake Performance



## Dynamic Platform





Vibration Test



Mechanical Integrity Test

## Testing Battery

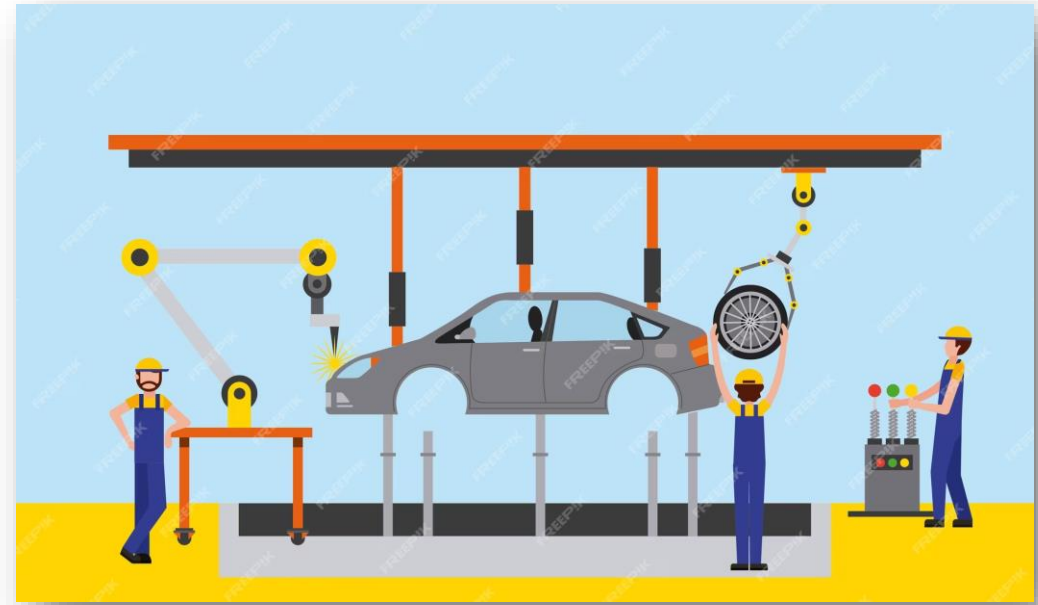
- Motorcycle (UN R136)
- BEV (UN R100)

\*\*\*Open Now\*\*\*



## 1. HRD in Automotive and Parts Industry in Transition (Upskil/Reskill).

- ✓ Develop Curriculars and Online and Onsite Training.
- ✓ Electric Vehicle and Electric Vehicle Dynamics Course.
- ✓ Propulsion Systems for Electric Vehicles Course.
- ✓ Battery Management System Course.
- ✓ Charge Station Course and Its Impact on the Power Grid.
- ✓ Course in Lightweight Metals and Composite Materials for Modern Vehicles.
- ✓ High Voltage System Safety and Safety in Electric Vehicles Course.
- ✓ Power Electronics in Electric Vehicles and Electrical Testing Standards.



## 2. Enhancing Parts Production to Next Generation Vehicle Supply Chain (Parts Transformation).

- ✓ Survey Parts manufacturer insights into the supply chain.
- ✓ Target potential parts.
- ✓ Analyze the development approach to target parts.
- ✓ Prepare strategic plans and modification plans.
- ✓ Enhance personnel skills in the automotive parts industry