

Research Report on Thailand's Automobile Manufacturing Industry, 2018-2022

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Abstracts

Description

Thailand's automobile manufacturing industry originated in the early 1970s. With its superior geographic location and government support, Thailand has become the largest automobile producer in Southeast Asia, and is called the Detroit of Asia. Automobile manufacturing has long been the pillar industry of the Thai economy. In 2017, the output value of automobile manufacturing accounted for more than 10% of Thailand's GDP.

From 2011 to 2012, the Thai government implemented the First-Time Buyer Program to encourage automobile consumption, which led to a rapid growth in automobile production and sales. However, the automobile production dropped by 25.77% in 2014 after the program expired. Despite a steady growth, it failed to recover to the 2.53 million units in 2013. The sales declined from 2013 to 2016, and rebounded to 873,000 units till 2017. Thailand's automotive industry is export-oriented. In the past five years, over 1 million automobiles were exported to ASEAN countries, Australia, the Middle East and Europe every year. The import volume is less. However, the import tariff on automobiles is expected to be lowered as Thailand signs more free trade agreements in recent years.

Over the years, the Thai government has introduced a series of policies to attract foreign investment. The automobile manufacturers in Thailand are mainly Japanese and US companies. The massive competitors and fierce competition make the market perfectly competitive. Compared with other Southeast Asian countries, Thailand has a developed auto parts industry and a large number of auto parts suppliers. However, it still needs to import key auto parts. There are many automobile brands in Thailand, including Toyota, Mitsubishi, Isuzu, Ford, BMW, Chevrolet, etc. which have produced a

strong scale effect after years of development and production expansion. With the popularization of new energy vehicles, the Thai government also drew up a roadmap to give tax breaks and other preferential policies to new energy vehicle enterprises.

According to CRI, Thailand's automotive industry has a good prospect. Thailand's Eastern Economic Corridor initiative proposes to develop 10 target industries including the automotive industry in the eastern region. And the free trade agreements with Australia, China, India, New Zealand and other ASEAN countries will facilitate the development of overseas markets for Thailand's automotive industry. The reduction of import tariffs will also provide a price advantage for automobiles. New energy vehicles will grow rapidly in Thailand with the expiration of the lock-up period of the First-Time Buyer Program, more automobiles beyond the warranty period, and the government's efforts to develop new energy vehicles. It is expected that in the next few years, the increase in residents' income will promote automobile consumption in Thailand. And the exemption of import tariffs on automobiles in ASEAN countries will boost Thailand's automobile exports.

CRI expects that automobile production will continue to grow in Thailand from 2018 to 2022. It will exceed 2.4 million units in 2022, of which over 1.1 million units will be sold in Thailand and over 1.3 million units will be exported.

Topics Covered:

Development environment of Thailand's automobile manufacturing industry

Analysis on supply of and demand for automobiles in Thailand

Competition in Thailand's automobile manufacturing industry

Major automobile manufacturers in Thailand

Analysis on production costs and prices of automobiles in Thailand

Driving forces and market opportunities for Thailand's automobile manufacturing industry from 2018 to 2022

Prospect of Thailand's automobile manufacturing industry from 2018 to 2022

Contents

1 BASIC CONCEPT OF THAILAND'S AUTOMOBILE MANUFACTURING INDUSTRY

- 1.1 Thailand's Automobile Manufacturing Industry
- 1.2 Classification of Automobiles in Thailand

2 ANALYSIS ON THAILAND'S AUTOMOBILE MANUFACTURING INDUSTRY

- 2.1 Economic Environment
- 2.2 Policy Environment
- 2.3 Social Environment
- 2.4 Supply
- 2.5 Demand
- 2.6 Import and Export

3 MARKET COMPETITION IN THAILAND'S AUTOMOBILE MANUFACTURING INDUSTRY

- 3.1 Barriers to Entry
 - 3.1.1 Technical Barriers
 - 3.1.2 Capital Barriers
- 3.2 Competition Pattern
 - 3.2.1 Bargaining Power of Suppliers
 - 3.2.2 Bargaining Power of Consumers
 - 3.2.3 Internal Competition
 - 3.2.4 Potential Entrants
 - 3.2.5 Substitutes for Automobiles

4 MAJOR AUTOMOBILE MANUFACTURERS IN THAILAND, 2017-2018

- 4.1 Toyota Motor Corporation
- 4.2 Isuzu Motors Limited
- 4.3 Honda Motor Co., Ltd.
- 4.4 Mitsubishi Motors Corporation
- 4.5 Nissan Motor Co., Ltd.
- 4.6 Ford Motor Company
- 4.7 Mazda Motor Corporation
- 4.8 Suzuki Motor Corporation

- 4.9 General Motors
- 4.10 Mercedes-Benz

5 ANALYSIS ON PRODUCTION COSTS AND PRICES OF AUTOMOBILES IN THAILAND, 2015-2018

- 5.1 Production Costs
- 5.2 Prices

6 FORECAST ON DEVELOPMENT OF THAILAND'S AUTOMOBILE MANUFACTURING INDUSTRY, 2018-2022

- 6.1 Factors Influencing Development of Thailand's Automobile Manufacturing Industry
 - 6.1.1 Major Driving Factors and Market Opportunities
 - 6.1.2 Threats and Challenges
- 6.2 Forecast on Supply of Automobiles in Thailand, 2018-2022
- 6.3 Forecast on Market Demand for Automobiles in Thailand
- 6.4 Forecast on Automobile Import and Export in Thailand

Selected Charts

SELECTED CHARTS

Chart Classification of Automobiles Registered in Thailand
Chart Thailand's GDP and GDP Per Capita, 2013-2017
Chart BOI's Policies on Automobile Manufacturing
Chart Production Volume of Automobiles in Thailand, 2013-2017
Chart Sales Volume of Automobiles in Thailand, 2013-2017
Chart Export Volume of Automobiles in Thailand, 2013-2017
Chart Import Volume of Automobiles in Thailand, 2013-2017
Chart Top 10 Automobile Brands by Sales in Thailand, 2017
Chart Profile of Toyota Motor Corporation
Chart Middle Prices of Natural Rubber in Thailand, 2015-2018
Chart Average Wages in Thailand's Manufacturing Industry, 2015-2018
Chart Price Index of Steels in Asia, 2015-2018
Chart Forecast on Production Volume of Automobiles in Thailand, 2018-2022
Chart Forecast on Sales Volume of Automobiles in Thailand, 2018-2022

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