

สร้างสังคมผู้ประกอบการไทย
ก้าวอย่างมั่นใจสู่ประชาคมอาเซียน

Moving Toward ASEAN Community

ATIGA

**Market access and National
Treatment on Services**

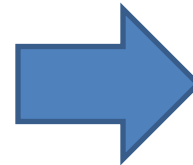
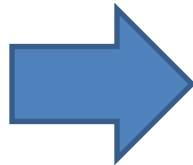
**MRAs on
Skilled Labor**

ACIA

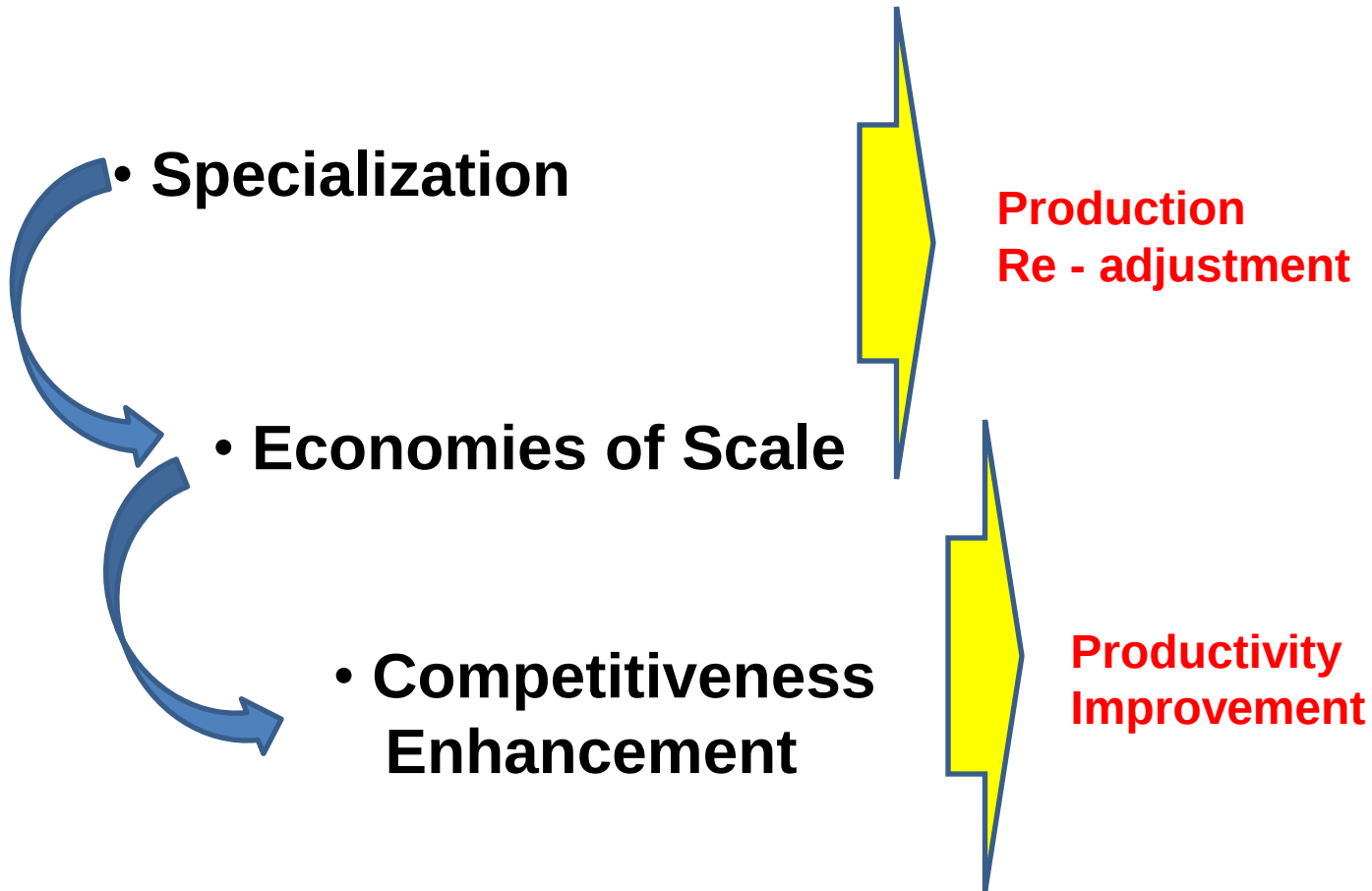
Trade of Goods

Capital and Workers

People



Goals



เวทีใหม่ โอกาสและประเด็นท้าทาย

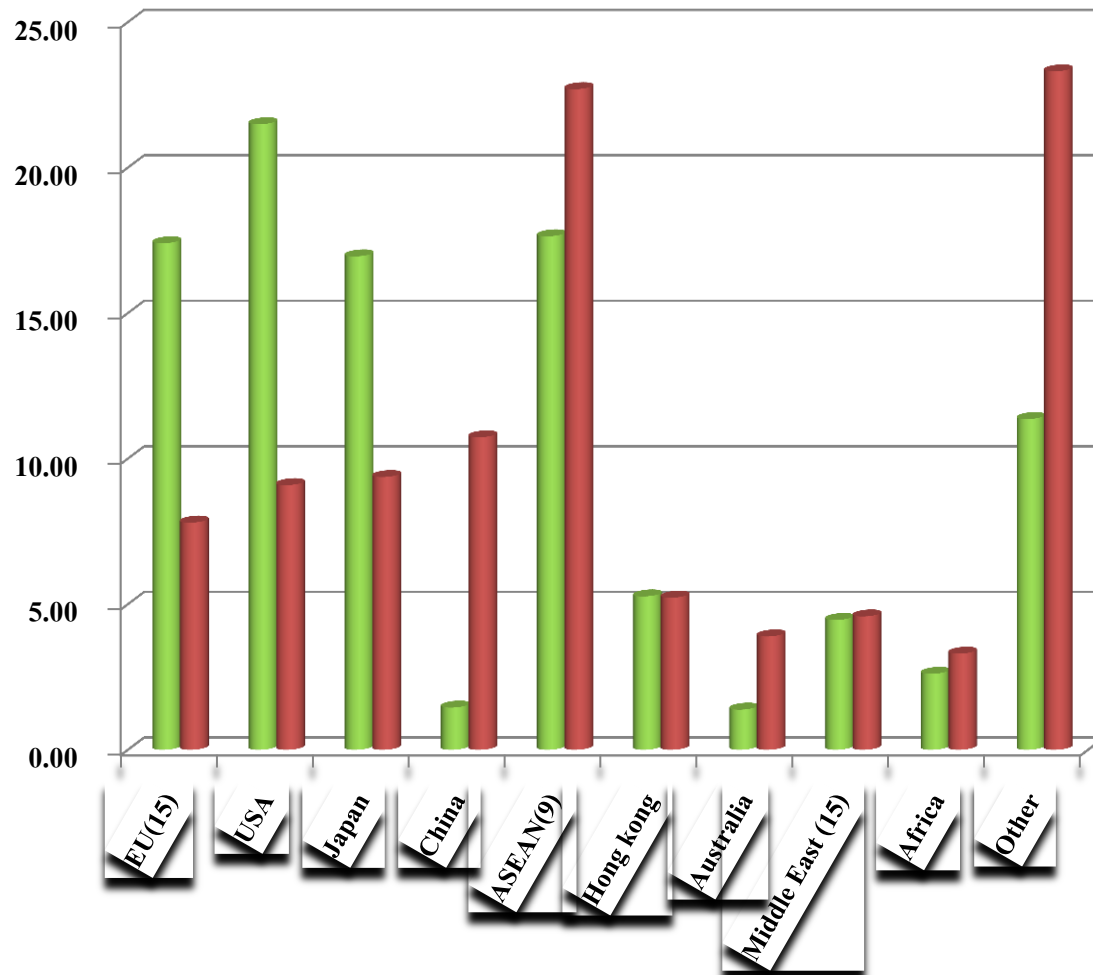
- ทำให้ปัจจัยภายนอกมีอิทธิพลมากขึ้น
- การเชื่อมโยงกับภายนอกทำได้ง่าย
transaction cost ลดลง
- ผู้เล่นใหม่มากขึ้นในเวทีการค้าธุรกิจ
- รัฐเข้ามาช่วยเหลือได้จำกัด

- ปัจจัยที่สนับสนุนเดิมๆ ใช้ไม่ได้
- คู่แข่งมาเคาะประตูบ้านและเราสามารถเข้าตลาดง่าย
- พี่เลี้ยงช่วยได้ไม่มากเหมือนก่อน
- ผู้ประกอบการเป็นขนาดเล็ก
- ทักษะการทำธุรกิจ

Structure of Exports of Thailand

Percentage(%)

1993 2012



Share of Exports (%)	1993	2012
EU(15)	17.4	7.80
USA	21.49	9.09
Japan	16.95	9.37
China	1.45	10.73
ASEAN(9)	17.64	22.70
Hong Kong	5.27	5.23
Australia	1.38	3.89
Middle East (15)	4.46	4.58
Africa	2.61	3.30
Other	11.36	23.31

Thailand VS. ASEAN

Unit : million USD

Exported Products	value@2012
All products	56,732
Other petroleum oils and preparations	7,094
Light petroleum oils and preparations	1,859
Diesel powered trucks with a GVW not exceeding five ton	1,332
Automobiles w reciprocated piston engine displace > 1000 cc to 1500 cc	1,262
Natural rubber latex, whether or not prevulcanised	1,110
Motor vehicle parts	1,007
Parts & accessories of automatic data process machines & units thereof	871
Automobiles with diesel engine displacing more than 1500 cc to 2500 cc	778
Raw cane sugar, (see subheading note 2.)	765
Computer data storage units	687

Imported Products	value@2012
All products	42,623
Petroleum oils and oils obtained from bituminous minerals, crude	4,114
Natural gas in gaseous state	3,423
Parts & accessories of automatic data process machines & units thereof	1,699
Computer data storage units	1,073
Electronic integrated circuits (excl. such as processors, controllers,	1,045
Copper cathodes and sections of cathodes unwrought	869
Coal, whether or not pulverised but not agglomerated	809
Magnetic media for the recording of sound or of other phenomena (excl.	660
Telephones for cellular networks mobile telephones or for other wireless	627
Other petroleum oils and preparations	623

Source : Trade Map

Thailand VS. China

Unit : million USD

Product	value@2012
All products	26,900
Computer data storage units	3,462
Technically specified natural rubber (TSNR)	2,327
Compounded rubber, un-vulcanized in primary forms	1,136
Manioc (cassava), fresh or dried, whether or not sliced or pellet	1,075
Parts & accessories of automatic data process machines & units thereof	928
Lumber, non-coniferous	678
Aromatic hydro-carbon mixtures etc.	663
P-xylene	653
Polyethylene having a specific gravity of less than 0.94	619
Natural rubber latex, whether or not pre-vulcanised	614

Product	value@2012
All products	36,957
Telephones for cellular networks mobile telephones or for other wireless	1,909
Parts & accessories of automatic data process machines & units thereof	1,541
Portable digital computers <10kg	1,471
Parts suitable f use solely/princ w the app of headings 85.25 to 85.28	1,350
Articles, iron or steel, nes	528
Electronic integrated circuits as processors and controllers, whether	429
Bars&rods,alloy steel,o/t stainless hr,in irregularly wound coils,nes	404
Flat rolled prod,as,o/t stainless,in coils,nfw thn hr,w>/=600mm,nes	399
Machines for the reception, conversion and transmission or regeneration	397
Printed circuits	380

China's Import

From Thailand

Product	value@2012
All products	38,475
Computer data storage units	7,708
Technically specified natural rubber (TSNR)	2,436
Parts & accessories of automatic data process machines & units thereof	1,720
Electronic integrated circuits (excl. such as processors, controllers,	1,388
Manioc (cassava), fresh or dried, whether or not sliced or pelleted	1,244
Compounded rubber in plates, sheets and strip (unvulcanised)	991
Electronic integrated circuits as processors and controllers, whether	962
Aromatic hydrocarbon mixtures etc nes	733
Polymers of ethylene, in primary forms	732
Television, cameras, digital cameras and video camera recorders	654

From ASEAN

Unit : million USD

Product	value@2012
All products	195,782
Electronic integrated circuits as processors and controllers, whether	32,216
Computer data storage units	15,071
Other petroleum oils and preparations	7,850
Electronic integrated circuits (excl. such as processors, controllers,	7,807
Palm oil and its fractions refined but not chemically modified	6,417
Technically specified natural rubber (TSNR)	5,295
Parts & accessories of automatic data process machines & units thereof	4,631
Nickel ores and concentrates	4,618
Bituminous coal, whether or not pulverised but not agglomerated	3,559
Lignite, whether or not pulverised, but not agglomerated	3,373

China eyes AEC as market or production base

Sectors	No.	Country	%share2005	%share2012
Manufacturing	1	China	11.77	23.30
	2	Japan	13.99	11.37
	3	South Korea	5.85	7.66
	4	USA	10.87	7.50
	5	Thailand	5.35	5.76
Paper and printing	1	China	4.85	13.92
	2	USA	10.08	7.01
	3	Taiwan	6.01	5.48
	4	Thailand	5.77	4.91
Automotive and parts	1	Japan	33.64	29.53
	2	Thailand	16.58	20.43
	3	China	6.47	11.07
	4	South Korea	9.63	6.08

อุตสาหกรรม	No.	ประเทศ	%share2005	%share2012
Electronic and Electrical Appliances	1	China	10.30	17.01
	2	Taiwan	6.76	12.6
	3	South Korea	6.94	9.44
	7	Thailand	2.81	3.63
Textile	1	China	24.23	45.73
	2	South Korea	14.18	12.48
	3	Taiwan	15.63	9.97
	6	Thailand	5.21	4.30
Garments	1	China	54.30	78.26
	2	Hong Kong	15.94	4.82
	3	South Korea	2.45	2.78
	4	Thailand	2.54	1.31
Plastic and Plastic products	1	China	6.07	16.98
	2	Japan	13.82	10.26
	3	Thailand	9.94	9.86
	4	USA	10.16	8.01

Evolution

- ADJUSTED IN TRADE PATTERN

Hold on with familiar sectors

- Lower cost
- Productivity
- Create Barriers

Political and
Social
reasons

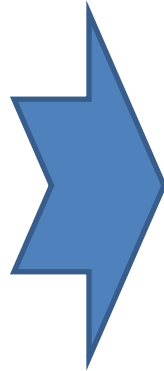
Structural Change

- SELF-SELECTION AND MOVE
TOWARD SPECIALIZATION



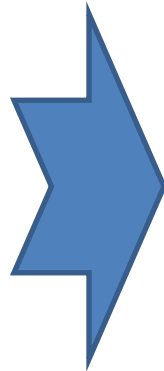
What we are good at

Ingenious



- Rice
- Rubber
- Corn
- Tapiocas
- Fishing

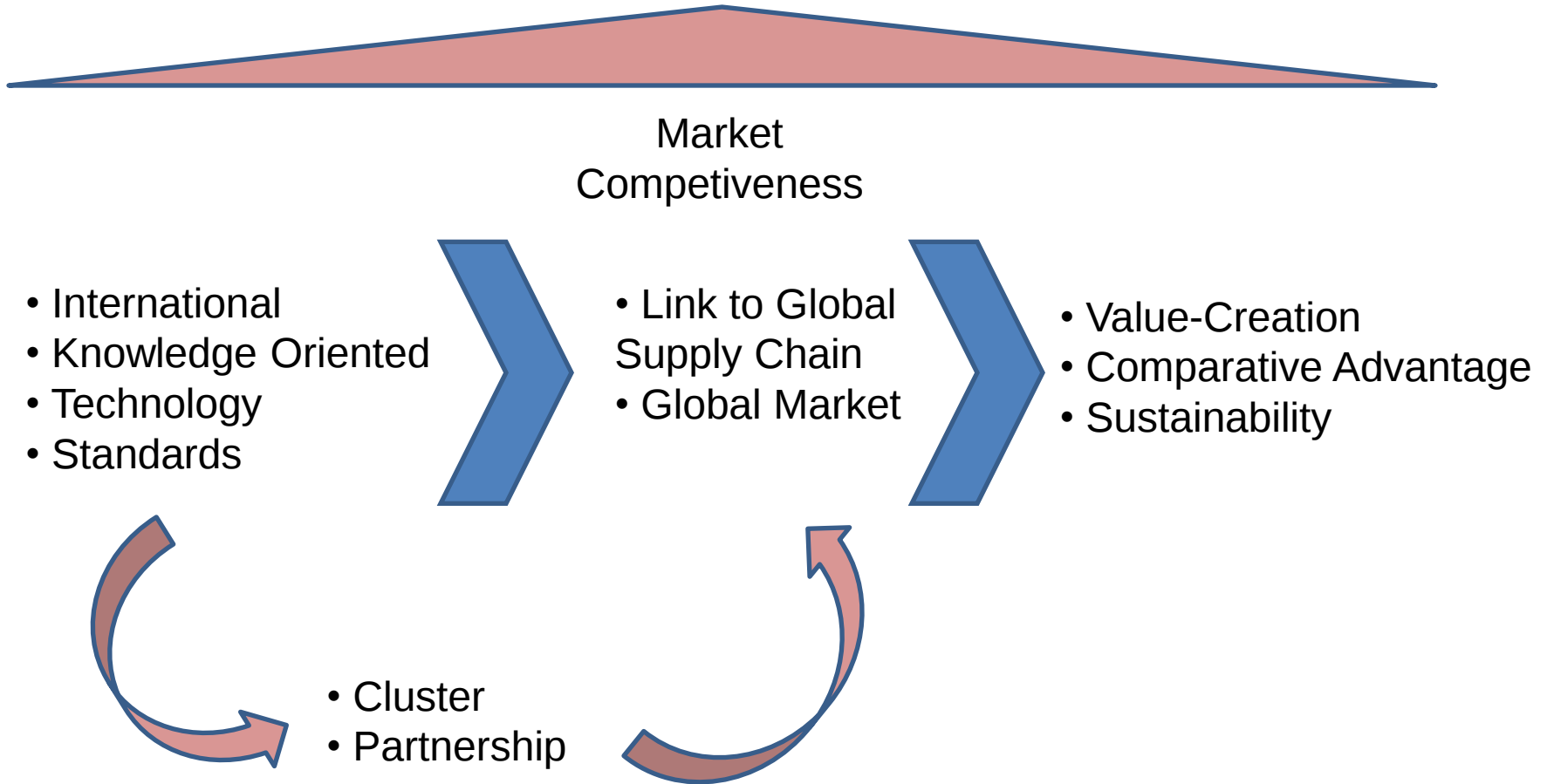
Inherits



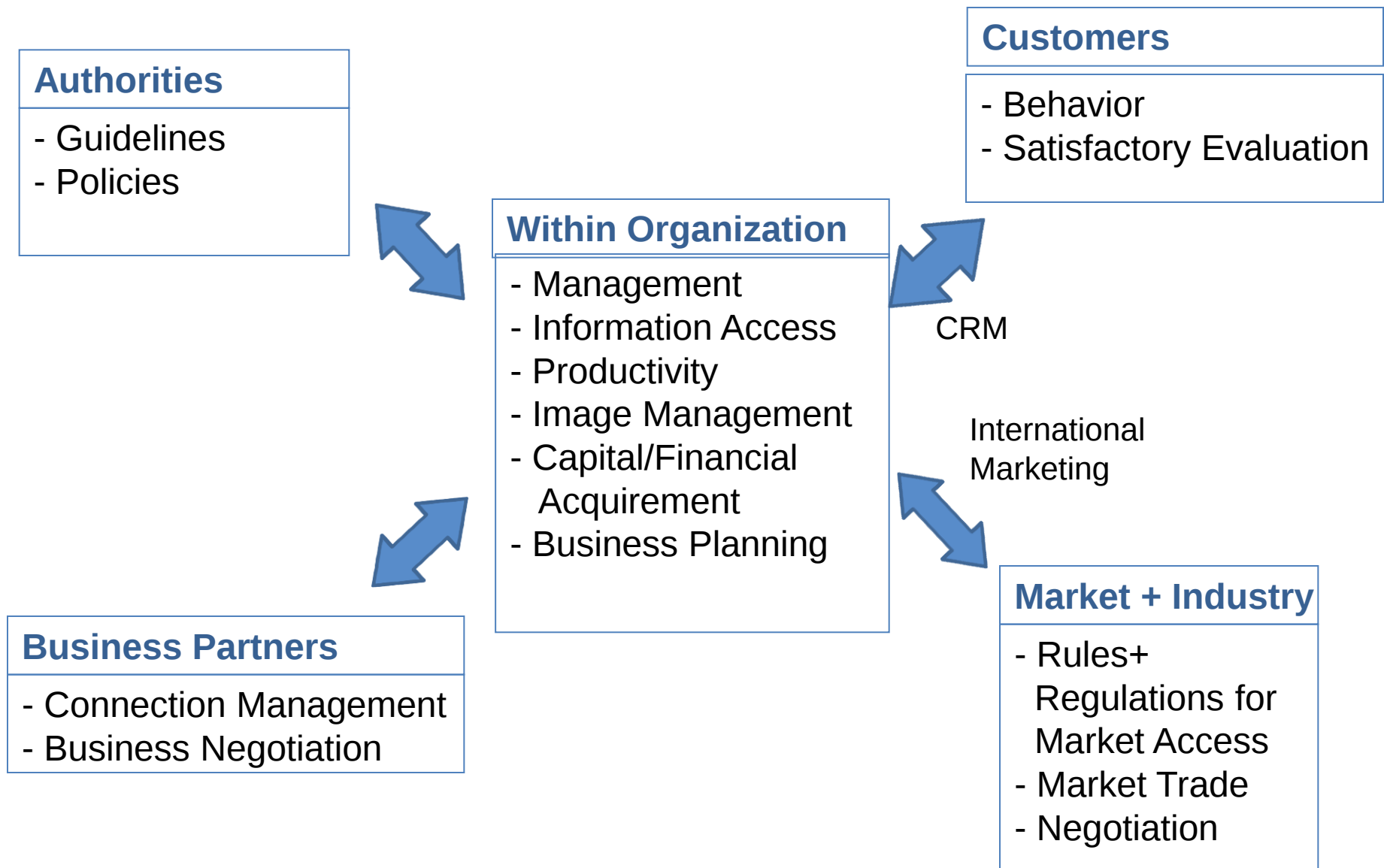
- Auto
- Electronics
- Rubber Products
- Processing Foods
- Bio-Energy

- 
- Construction
 - Tourism
 - Health Care

How we get there



Multiple Skill and Knowledge



Put more weight on the most needed skills