Malaysia’s Automotive Industry

Business Opportunities
Automotive Industry

Malaysia

Your Gateway to the ASEAN Automotive Market

Centrally located in the ASEAN region with a population of more than 600 million people, Malaysia offers vast opportunities for global automotive and component manufacturers to set up manufacturing and distribution operations in the country. Pragmatic government policies, political and economic stability, sound economic fundamentals, well-developed infrastructural facilities and an educated and skilled labour force have attracted major international automotive and component manufacturers to invest in Malaysia.

The establishment of national car projects, PROTON and PERODUA, has transformed Malaysia from a mere motor car assembler into a car manufacturer. The industry has boosted the development of engineering, auxiliary and supporting industries and contributed to skills development and the upgrading of technological and engineering capabilities. These factors have further enhanced the attractiveness of Malaysia as a base for global automotive manufacturers.

With an estimated ratio of more than 800 cars for every one thousand people, Malaysia ranks among countries with high car ownership ratio in the region. Honda, Toyota, Nissan, Mercedes-Benz and BMW are some of the global automotive companies which have set up their operations in Malaysia to take advantage of the buoyant consumer demand. International component manufacturers, such as TRW, Delphi, VDO, Nippon Wiper Blade, Denso and Bosch have also made Malaysia their base to launch their products in the region.

Reaching New Heights

There are currently 4 National Projects and 9 assemblers in the motor vehicle sub-sector, with an annual installed capacity of approximately 963,300 units. In addition, there are 11 manufacturers/assemblers of motorcycles and scooters with an installed capacity of 1,069,700 units per year where production catering primarily for the domestic market.

The production of motor vehicles in Malaysia for 2016 amounted to 545,253 units, comprising 503,691 units of passenger vehicles and 41,562 units of commercial vehicles. Sales of motor vehicles amounted to 580,124 units in 2016 consisting of 514,545 units of passenger vehicles and 65,579 units of commercial vehicles.

The PROTON plant in Tanjung Malim is fully automated, employing robotic technology, and is designed for high volume production and efficiency, using lean manufacturing processes.
Expanding Global Network

The National Automotive Policy (NAP) was introduced in 2006 to transform the domestic automotive industry and integrate it into the increasingly competitive regional and global industry network. The NAP was reviewed in 2009 to enhance the capability and competitiveness of the domestic automotive industry. The NAP 2014 aims to spur further growth and improve the long-term viability and competitiveness of the automotive industry in Malaysia by focusing on green initiatives, development on technology and enhancement of the automotive industry ecosystem.

National Automotive Policy 2014

The objectives of the NAP 2014 are to:

• promote a competitive and sustainable domestic automotive industry including the national automotive companies;

• make Malaysia as the regional automotive hub in EEVs;

• promote increase in value-added activities in a sustainable manner;

• promote increase in exports of vehicles and automotive components;

• promote participation of Bumiputera companies in the total value chain of the domestic automotive industry; and

• safeguard consumers’ interest by offering safer and better quality products at competitive prices.

Central to this policy is the vision of Malaysia to become an energy efficient vehicle (EEVs) hub. This encompasses strategies and measures to strengthen the entire value chain of the automotive industry and will also lead to environment conservation, high-income job creation, transfer of technology and create new economic opportunities for local companies.
The NAP 2014 consists of three main directions and strategies. The three main directions are Investment, Technology and Engineering, and Market Expansion, while the three main strategies are Human Capital Development, Supply Chain Development, and Safety, Security and Environment.

Measures in NAP 2014

- Issuance of new Manufacturing Licence for motor vehicles in the category of EEVs across all segments.
- Provision of customised incentives to attract strategic investments in the EEVs category.
- Provision of customised incentives to develop key strategic areas to enhance the domestic automotive ecosystem. The strategic areas include: power train, transmissions and related control systems, dies set and mould base, aluminium and other non-ferrous casting.
- Issuance of new Manufacturing Licence for selected segment is maintained as follows:
  - luxury passenger vehicles engine capacity of 1,800 c.c. and above and on the road price not less than RM150,000;
  - hybrid and electric vehicles;
  - pickup trucks;
  - commercial vehicles; and
  - motorcycles with engine capacity of 200 c.c. and above
- Provision of 100 per cent Investment Tax Allowance or Pioneer Status for a period of 10 years for the manufacturing of hybrid and electric vehicles;
- Provision of 100 per cent Pioneer Status for a period of 10 years or 100 per cent Investment Tax Allowance for a period of 5 years for the manufacturing of value added and highly critical components.

Measures in NAP 2009 that are maintained

- The freeze on Manufacturing Licence issuance for rebuilt of commercial vehicles is maintained;
- Provision of import tax and excise duty exemption from 1 January 2014 until 31 December 2015 for Completely Knock Down (CKD) hybrid vehicles and from 1 January 2014 until 31 December 2017 for Completely Knock Down (CKD) electric vehicles.

Regional Opportunities under the ASEAN Free Trade Area

In line with Malaysia's commitment under AFTA and to encourage competitiveness in the automotive industry, import duties on CKD and CBU vehicles from ASEAN countries have been reduced to 0% and 5% respectively. For vehicles from non-ASEAN countries, the import duties on CKD vehicles have been reduced to 0-10% while import duties on CBU vehicles
were reduced to 30%. To maintain government revenue, excise duties are imposed on all vehicles, both locally manufactured/assembled and imported. The import and excise duties imposed are as follows:

**Imports from ASEAN countries**

<table>
<thead>
<tr>
<th></th>
<th>Import Duties</th>
<th>Excise Duties</th>
</tr>
</thead>
<tbody>
<tr>
<td>CKD vehicles</td>
<td>0%</td>
<td>60 - 125%</td>
</tr>
<tr>
<td>CBU vehicles</td>
<td>0%</td>
<td>60 - 125%</td>
</tr>
<tr>
<td>CKD motorcycles</td>
<td>0%</td>
<td>20 - 50%</td>
</tr>
<tr>
<td>CBU motorcycles</td>
<td>0%</td>
<td>20 - 50%</td>
</tr>
</tbody>
</table>

**Imports from non-ASEAN countries**

<table>
<thead>
<tr>
<th></th>
<th>Import Duties</th>
<th>Excise Duties</th>
</tr>
</thead>
<tbody>
<tr>
<td>CKD vehicles</td>
<td>10%</td>
<td>60 - 125%</td>
</tr>
<tr>
<td>CBU vehicles</td>
<td>30%</td>
<td>60 - 125%</td>
</tr>
<tr>
<td>CKD motorcycles</td>
<td>10%</td>
<td>20 - 50%</td>
</tr>
<tr>
<td>CBU motorcycles</td>
<td>30%</td>
<td>20 - 50%</td>
</tr>
</tbody>
</table>

*Source: Malaysian Automotive Association (MAA)*

The elimination/reduction of tariffs on motor vehicles by the Malaysian government leveled the playing field for all automotive industry participants. This is clearly an important step undertaken by the government towards trade liberalisation.

While Malaysia has no commitment to reduce import duty for vehicles imported from non-ASEAN countries, in order to be equitable, the Government has also reviewed the import duty structure on vehicles that are imported from Non-ASEAN countries.

**A Growing Automotive Parts & Components Sector**

The development of Malaysia’s automotive industry has made the country a production centre for major automotive component manufacturers. Today, there are about 800 automotive component manufacturers, producing a wide range of components, such as body panels, brake parts, engine parts, transmission and steering parts, rubber parts and electrical and electronic parts.
Major component manufacturers include multinational companies, such as Delphi Automotive Systems, TRW, ZF, Bosch, Akashi Kikai, Continental Automotive, Denso and local companies such as APM Automotive, Sapura, Delloyd, TCM Stamping and Ingress.

In addition to supplying to the local original equipment market, an increasing number of component manufacturers are exporting their products, especially to ASEAN countries. China and Thailand are also among the major export destinations.

The global trend in automotive manufacturing – the modular system – is also fast gaining prominence in Malaysia. Proton has taken the lead in implementing this modular system with the manufacture of the Proton Waja model. Some of the module manufacturers include Hicom Teck See Manufacturing, APM Industries Holdings, Delphi Packard Electric, Denso, Autoliv Hirotako Safety and Sapura Automotive.

Benefiting from Strong Engineering Supporting Industries

The engineering supporting industries have developed in tandem with the development of the manufacturing sector. The rapid development of the mould and die, metal casting, machining, metal stamping, surface treatment, finishing and heat treatment industries in Malaysia augurs well for the development of the automotive industry.

Mould & Dies

There are about 28 mould and die companies which cater to the automotive industry. These companies can manufacture specific types of moulds, dies and tooling to meet the needs of the industry.
Metal Casting

The metal casting industry, comprising sand casting, die-casting and investment casting, has developed into a major supply source supporting the automotive industry. Currently, about 27 die-casting companies supply the automotive industry with die-cast parts and components, such as front and rear wheel hub, front and rear brake panel and alternator housing and engine parts such as crank case, crank case cover and cylinder head cover.

Machining

There are over 170 companies undertaking specialized precision machining and over 250 small machining workshops. Some of these companies possess state-of-the-art machining centres with capabilities to machine minute precision gears and shafts for engine and transmission parts.

Metal Stamping

Metal stamping, another important supporting industry for the automotive industry, is a well-established industry in Malaysia, with over 300 companies in operation. A number of these companies undertake secondary processes, such as electroplating or spray painting and surface finishing treatment of stamped parts and components.

Metal Surface Treatment/Finishing

The metal surface treatment/finishing industry, with over 54 companies in operation, provides a variety of plating services, such as batch and continuous electroplating, precision electroplating, electroless plating, functional electroplating, cathodic electrodeposition, dacrotised treatment, phosphating, passivation, anodizing and chromating.

Heat Treatment

In the heat treatment service industry, there are over 20 companies in operation, offering a range of services, covering continuous mesh-belt heat treatment, vacuum hardening, carburizing, carbonitriding, nitriding, annealing and tempering for a diverse range of products. Heat treatment services for high carbon steel and alloy steel materials, such as critical parts for bearing and automotive components, are the latest addition to the range of services provided.

A Conducive Investment Environment

Against a backdrop of steady economic growth, highly developed infrastructure and pro-business government policies, Malaysia provides a conducive environment for manufacturing activities.

Malaysia is one of the fastest growing economies in the region with gross domestic product growing at an average of over five percent in the 1980s and over seven percent in the 1990s. GDP growth in 2016 was 4.3%.

The world-class Kuala Lumpur International Airport, well-equipped seaports and an extensive road and rail network form the backbone of an efficient transport system which are vital to the development of the economy.

Malaysia’s workforce is multi-cultural, multi-lingual (English speaking), well-educated and among the most dynamic and competitive in the region.

The Malaysian Economy - Key Statistics (2016f)

<table>
<thead>
<tr>
<th>Population</th>
<th>31.4 million</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total labour force</td>
<td>14.1 million</td>
</tr>
<tr>
<td>GDP Growth rate</td>
<td>4 - 5 %</td>
</tr>
<tr>
<td>Per capita income</td>
<td>RM 38,438</td>
</tr>
<tr>
<td>Car ownership ratio</td>
<td>1:5</td>
</tr>
</tbody>
</table>

Automotive Industry
Vast Investment Opportunities

Committed to the development of the automotive industry, Malaysia offers vast and attractive opportunities for investors. The Malaysian government encourages investment in areas such as:

- Critical components (eg. engines, transmissions and chassis)
- Auto electronic components (eg. Engine management system and vehicle intelligence system)
- Fuel efficient engines and alternative fuel engines.
- Modular manufacture/systems integration
- Research and development, which will enhance domestic technical skills and engineering capabilities.

Attractive Incentives

To encourage continued investments in the automotive industry, Malaysia offers attractive tax incentives to automobile and component manufacturers. Among the major incentives provided are:

- Pioneer Status with partial/full exemption from the payment of income tax for 5 or 10 years.
- Investment Tax Allowance of 60% of qualifying capital expenditure incurred within five years from the date the first capital expenditure was incurred.

### Total Motor Vehicle Sales in the 6 Major ASEAN Countries

<table>
<thead>
<tr>
<th>Countries</th>
<th>2016 TIV (units)</th>
<th>2015 TIV (units)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indonesia</td>
<td>1,061,735</td>
<td>1,013,291</td>
</tr>
<tr>
<td>Thailand</td>
<td>768,788</td>
<td>799,632</td>
</tr>
<tr>
<td>Malaysia</td>
<td>580,124</td>
<td>666,677</td>
</tr>
<tr>
<td>Philippines</td>
<td>359,572</td>
<td>288,609</td>
</tr>
<tr>
<td>Vietnam</td>
<td>270,820</td>
<td>209,267</td>
</tr>
<tr>
<td>Singapore</td>
<td>110,455</td>
<td>78,609</td>
</tr>
<tr>
<td><strong>ASEAN 6</strong></td>
<td><strong>3,151,494</strong></td>
<td><strong>3,056,085</strong></td>
</tr>
</tbody>
</table>

Source: MAA (Malaysian Automotive Association) & AAF (ASEAN Automotive Federation)
Some Successful Foreign Automotive and Component Companies already in Malaysia

**Honda Malaysia Sdn. Bhd.** is a joint-venture between Honda Motor Co. Ltd. of Japan (51%), DRB-HICOM Berhad (34%) and Oriental Holdings Berhad (15%). Currently, Honda Malaysia assembles the City, Civic, CR-V, Accord and both the Jazz Petrol and Hybrid variants at its Pegoh Plant in Melaka. The plant, with a total built-up area of 13 acres, has a production capacity of 100,000 units of vehicles annually, and 400 units daily. With the implementation of No. 2 Line early 2014, Honda will be assembling more vehicles for the growing Malaysia market particularly in the small models and hybrid segment, which has seen steady growth over the past couple of years. In line with its goal to provide the best customer service, the company has a dedicated parts warehouse located in Klang, Selangor.

**BMW Group Malaysia** encompasses BMW Malaysia Sdn. Bhd. and BMW Asia Technology Center Sdn. Bhd. Its activities cover the wholesale of BMW cars, spare parts and accessories, as well as the overall planning of sales, marketing, after-sales, and other related activities in Malaysia. BMW Asia Technology is responsible for the operations of the group's Data Centre in Cyberjaya and the Parts Distribution Centre in the Port of Tanjung Pelepas. Retail sales of BMW and MINI cars fall under the purview of authorized BMW dealers. BMW Malaysia's dealership network covers 22 showrooms and workshops in various cities in Malaysia.

**Mercedes-Benz Malaysia Sdn. Bhd.** a joint venture company formed in 2003, was established to manage the wholesale distribution of Mercedes-Benz passenger cars, commercial vehicles and spare parts, as well as additional services in the field of software development for global sales solutions and automotive apprentice training. Since 2004, it has expanded its brand portfolio to include the wholesale distribution of smart passenger cars, Maybach passenger cars and Mitsubishi Fuso Commercial Vehicles. Mercedes-Benz Malaysia currently employs over 230 employees with its administrative and sales office located at Menara TM in Kuala Lumpur whilst its production plant is located at Pekan, Pahang. With a total investment of RM120 million in Pekan Pahang, Mercedes-Benz (BMW) AG, manufacturer of BMW vehicles based in Munich, Germany and Sime Darby Group.
Malaysia’s collaborative effort with DRB-Hicom Berhad has resulted in the local assembly of some of the world’s most coveted passenger cars namely the Mercedes-Benz S-Class, E-Class and C-Class as well as the Mercedes-Benz and Mitsubishi Fuso commercial vehicles. Mercedes-Benz (M) Sdn. Bhd has also expanded its operations to include the establishment of Apprentice Training Centre and Vehicle Preparation Centre and Automotive Spare Parts Warehouse in Shah Alam, Selangor.

Volkswagen Malaysia Group Sdn. Bhd. was officially launched in Malaysia on 16 February 2006, with the Corporate Headquarters situated in Wisma Volkswagen, Bangsar. The office controls marketing, sales and after sales to cater and fulfill the Malaysian customer’s wishes for individual mobility in all situations of life. At the end of 2010, Volkswagen and DRB-HICOM laid the foundations for cooperation by signing an agreement for local vehicle assembly at the Pekan plant, for the Malaysian and subsequently, the ASEAN market. Apart from the growth markets of China and Asia, the ASEAN region is becoming increasingly important for the Volkswagen Group as a key market for the future under the Group’s Strategy 2018.

**DENSO**

Denso (Malaysia) Sdn. Bhd., which was established in 1980, is one of the largest automotive component manufacturers in Malaysia. A pioneer in the development of many products, Denso (Malaysia) focuses on the manufacture of air-conditioning systems: cooling units, condensers, compressors and evaporators; engine management system components: starter motors, alternators and radiators; and instrument clusters and others: meters, windshield wipers, windshield washers, power window motors, flashers and relays. In addition to being a major automotive component supplier to the national car
projects, the company also exports its products to Indonesia, Thailand, Taiwan, Philippines, Australia, Japan and the United States of America.

**TRW Automotive**, a world leader in steering and suspension systems and number one in the global market for electric steering systems, established TRW Steering and Suspension (Malaysia) Sdn. Bhd. in 1992 to manufacture steering gear boxes. Today, it has diversified into the manufacture of tierods, tierod ends, suspension ball joints, stabilizer bars, steering columns, steering linkages as well as cold forged parts and components for motor vehicle braking system.
Malaysia Automotive Lighting Sdn. Bhd. is engaged in the research, design, development and manufacture of exterior automotive lightings and components, making it the only location for research and development activities in the Asia-Pacific region. The company exports more than 60% of its production, mainly to Japan and Thailand for Mazda, Suzuki, Isuzu and DaimlerChrysler while its domestic customers are mainly PROTON and PERODUA.
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