



# MALAYSIA-YOUR SOUTHEAST ASIAN AUTOMOTIVE HUB





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# A SNAPSHOT OF MALAYSIA

Strategically located in Southeast Asia, Malaysia is an upper-middle-income country with an educated workforce supported by a well-developed manufacturing ecosystem as well as transport and logistics infrastructure. It offers investors a springboard to the rest of Southeast Asia, a dynamic and growing region of nearly 700 million consumers with a strong demand for passenger and commercial vehicles.

Malaysia is the first country in Southeast Asia that has nurtured automotive companies producing vehicles that are designed locally. Backed by policy and sound economic fundamentals, Malaysia’s conducive environment has attracted major international automotive and automotive component manufacturers to set up production and distribution facilities in the country.



# A COMPREHENSIVE AUTOMOTIVE LANDSCAPE

The domestic automotive industry really took off with the establishment of Proton Holdings Berhad (Proton) in 1985 and Perusahaan Otomobil Kedua Sdn. Bhd. (Perodua) in 1992. Both these automotive companies have transformed the industry landscape in the country and made Malaysia the only car manufacturer in Southeast Asia, placing it a step above being merely a car assembler.

The growth of the automotive industry has also boosted the development of supporting upstream industries, such as steel and chemicals, as well as downstream industries, including information technology and maintenance services. It continues to play a significant role in Malaysia’s industrialisation with value-added economic activities and the creation of well-paying jobs. The industry has also contributed to the upgrading of technological and engineering capabilities as well as skills development that further enhance the country as an attractive base for global automotive manufacturers. Meanwhile, the entry of Zhejiang Geely Holding Group Co. Ltd. in 2017 as a stakeholder in Proton demonstrates keen interest among global automotive companies to penetrate the Southeast Asian market through Malaysia.

With its vibrant passenger-car market and one of the highest car ownerships in Southeast Asia, Malaysia has lured foreign MNCs to set up operations here to take advantage of consumer demand. Malaysia’s automotive industry is the third-largest in Southeast Asia after Thailand and Indonesia. Among foreign car manufacturers that have set up operations here are Honda Motor Company Ltd., Toyota Motor Corporation, Nissan Motor Co. Ltd., Mercedes-Benz and Bayerische Motoren Werke AG (BMW). International component manufacturers that have set up their base in Malaysia to launch products in the region include ZF Friedrichshafen AG, Delphi Technologies PLC, Continental AG, Nippon Kayaku, PD Kawamura, Akashi Kikai Industry Co. Ltd., Denso Corporation and Robert Bosch GmbH.

PASSENGER & COMMERCIAL VEHICLES REGISTERED IN MALAYSIA FOR THE YEAR 2011 TO 2021 AND 1<sup>st</sup> HALF OF 2022  
Table 1: Details of Malaysia’s Total Industry Volume (TIV)  
2011-2021 and 1H 2022

| YEAR    | PASSENGER VEHICLES (UNIT) | COMMERCIAL VEHICLES (UNIT) | TOTAL VEHICLES (UNIT) |
|---------|---------------------------|----------------------------|-----------------------|
| 2011    | 535,113                   | 65,010                     | 600,123               |
| 2012    | 552,158                   | 75,575                     | 627,733               |
| 2013    | 576,640                   | 79,104                     | 655,744               |
| 2014    | 588,348                   | 78,139                     | 666,487               |
| 2015    | 591,275                   | 75,402                     | 666,677               |
| 2016    | 514,594                   | 65,491                     | 580,085               |
| 2017    | 514,675                   | 61,950                     | 576,625               |
| 2018    | 533,202                   | 65,512                     | 598,714               |
| 2019    | 550,179                   | 54,108                     | 604,287               |
| 2020    | 480,971                   | 48,543                     | 529,514               |
| 2021    | 452,663                   | 56,248                     | 508,911               |
| 1H 2022 | 293,540                   | 37,846                     | 331,386               |

PASSENGER & COMMERCIAL VEHICLES PRODUCED AND ASSEMBLED IN MALAYSIA FOR THE YEAR 2011 TO 2021 AND 1<sup>st</sup> HALF OF 2022  
Table 2: Details of Malaysia’s Total Production Volume (TPV)  
2011-2021 and 1H 2022

| YEAR    | PASSENGER VEHICLES (UNIT) | COMMERCIAL VEHICLES (UNIT) | TOTAL VEHICLES (UNIT) |
|---------|---------------------------|----------------------------|-----------------------|
| 2011    | 488,261                   | 45,254                     | 533,515               |
| 2012    | 509,621                   | 59,999                     | 569,620               |
| 2013    | 543,892                   | 57,515                     | 601,407               |
| 2014    | 545,122                   | 51,296                     | 596,418               |
| 2015    | 563,883                   | 50,781                     | 614,664               |
| 2016    | 503,691                   | 41,562                     | 545,253               |
| 2017    | 459,558                   | 40,081                     | 499,639               |
| 2018    | 522,392                   | 42,579                     | 564,971               |
| 2019    | 534,115                   | 37,517                     | 571,632               |
| 2020    | 457,755                   | 27,431                     | 485,186               |
| 2021    | 446,431                   | 35,220                     | 481,651               |
| 1H 2022 | 294,122                   | 23,811                     | 317,933               |

Source: Malaysian Automotive Association (MAA)



# INDUSTRY OVERVIEW

## THE AUTOMOTIVE VALUE CHAIN ECOSYSTEM

The automotive industry in Malaysia is mature with a well-developed ecosystem comprising the production of motor vehicles, namely passenger vehicles and commercial vehicles, motorcycles and scooters, as well as the manufacturing of parts and components.

|                              | PRODUCED<br>MOTO VEHICLES<br>(UNIT) | SALES OF<br>MOTO VEHICLES<br>(UNIT) |
|------------------------------|-------------------------------------|-------------------------------------|
| 2021                         |                                     |                                     |
| PASSENGER VEHICLES           | 446,431                             | 452,663                             |
| COMMERCIAL VEHICLES          | 35,220                              | 56,248                              |
| TOTAL MOTOR VEHICLES         | 481,651                             | 508,911                             |
| 1 <sup>st</sup> Half of 2022 |                                     |                                     |
| PASSENGER VEHICLES           | 294,122                             | 293,540                             |
| COMMERCIAL VEHICLES          | 23,811                              | 37,846                              |
| TOTAL VEHICLES               | 317,933                             | 331,386                             |

Future trends and opportunities in the automotive industry lie in the technologies of Industry 4.0. These trends include the use of artificial intelligence (AI) to power the Internet of Things (IoT), advanced robotics, big-data analytics and 3D printing. These technologies will, over the next 10 to 15 years, shape the industry, which is already witnessing vehicles powered by electricity, autonomous driving and the connectivity of various gadgets.



The domestic automotive industry has benefited significantly from the Malaysian Government's continued promotion of infrastructure development through investments. Simultaneously, regional trends promoting economic growth and infrastructure development as well as the introduction of new models by automotive original equipment manufacturers (OEM) due to demand continue to support industry growth.

## NATIONAL AUTOMOTIVE POLICY (NAP)

### Ensuring Competitiveness

The NAP 2020 is the fourth iteration of Malaysia's policy framework for the automotive industry. NAP 2020 focuses on the technologies of Industry 4.0, Next Generation Vehicle (NxGV) and Mobility as a Service (MaaS). NAP 2020 builds upon the work of earlier iterations of the NAP, which was first introduced in 2006, and reviewed in 2009, to transform the domestic automotive industry and integrate it into an increasingly competitive regional and global industry network.



#### NxGV

A vehicle with EEV status and having achieved at least Level 3 automation (conditional automation)



#### MaaS

A concept of integrating various types of transport services to a centralised mobility service portal



#### Industry 4.0

The use of Industry 4.0-related technology applications, especially AI, Big Data, and IoT to enable the implementation of NxGV and MaaS

### NAP 2020

Released in February 2020, the latest NAP serves as a guide for transforming Malaysia into a regional centre for automotive research and development (R&D), high-value manufacturing activities and the adoption of the technologies of Industry 4.0 for expansion into new growth areas.

#### The Primary Goals of NAP 2020 are:

The development of the NxGV technology ecosystem to make Malaysia the regional hub for NxGV production



To expand industry participation in MaaS;



To encourage the adoption of Industry 4.0;



To ensure the whole ecosystem gains the benefits of NxGV implementation;

To reduce vehicle carbon emissions by improving the country's vehicular fuel efficiency by 2025.



NAP 2020 also serves as the framework policy covering the comprehensive development of the automotive industry's value chain, human capital, indigenous technologies, aftermarket, exports, infrastructure, standards/regulations and others.



# THE GOVERNMENT ENCOURAGES EV INVESTMENTS

**Under the Ministry of Environment and Water's Low Carbon Mobility Blueprint (2021-2030), there is a target for 15 per cent of TIV to be EV by 2030 and 10,000 units of charging stations to be installed by 2025.**

To spur EV adoption, the Government is welcoming investors to set up EV charging infrastructure, with the policy allowing for 100 per cent foreign ownership.

Standards related to the EV industry, such as charging systems, battery disposal activities, battery swapping, wireless charging, among others, are also being established to ensure that the EV technology used and developed in the country is standardised, safe and of high quality.

Malaysia is an attractive location for an EV hub for Southeast Asia in view of the available infrastructure, technology, talent, and Government support as well as established supporting industries such as electrical and electronics (E&E), semiconductor, factory automation and equipment makers.

The Government has formed The Malaysia Electric Vehicle Task Force to facilitate EV policy and to streamline incentives towards the adoption of EV in Malaysia. The investment is parallel to the National Investment Aspirations (NIA) focused on Environmental, Social and Corporate Governance (ESG) goals across all sectors. This ultimately echoes Malaysia's commitment towards the United Nation's Sustainable Development Goals.

One pivotal project under the Twelfth Malaysia Plan (12MP) is the Centre of Excellence for Future Industry which operates as a high-end shared facility for the advancement of future technologies and innovations in the country. This will be a key catalyst to the development of the NxGV, which includes EV with intelligent mobility functions, and will enhance local industry capabilities not only in hardware but also in software solutions.

The Government has pledged to drive sustainability and inclusivity as outlined in the 12MP, with the commitment to achieve net-zero GHG emissions by 2050 at the earliest.

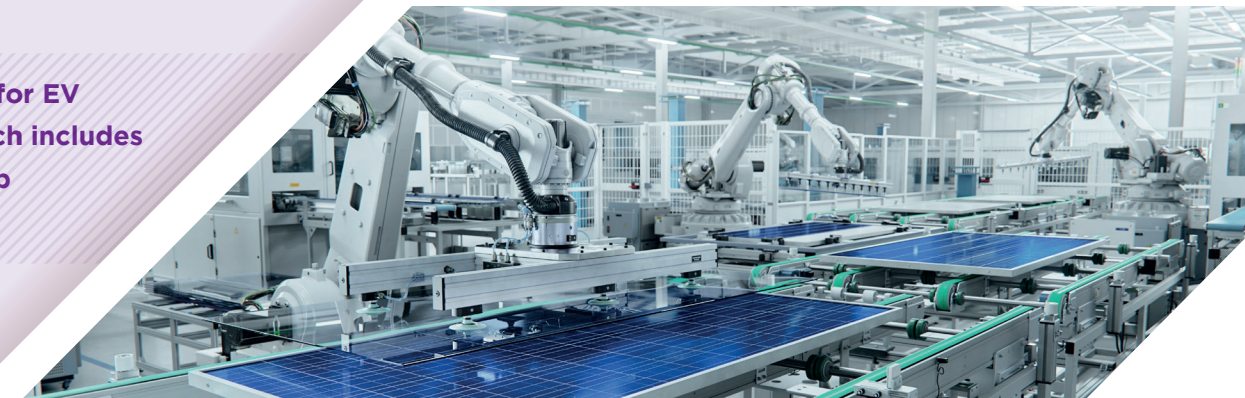


## COMPETITIVE EV INCENTIVES

**In the 2022 Budget, the Government announced incentives for EV ownership as part of the support for the EV ecosystem, which includes encouraging green investments and creating high-skilled job opportunities.**

Among these incentives are full import duty, excise duty and sales tax exemptions for locally assembled EVs until 31 December 2025 and full import duty and excise duty exemption for imported EVs until 31 December 2023.

In addition, a road tax exemption of up to 100% will be provided for EV vehicles, in addition to individual income tax relief of up to RM2,500 on the cost of purchase, installation, rent, hire purchase as well as subscription fees for EV charging facilities.



## SPECIAL TAX INCENTIVE IS ALSO PROVIDED FOR THE DEVELOPMENT OF EV CRITICAL COMPONENTS SUCH AS:



Battery Management System (BMS)



Battery Pack & Capacity



Artificial Intelligence



On-board Charging



Charging Infrastructure




Modular Based Battery Swapping Technology




# POTENTIAL FOR INVESTMENTS

Prospective investors are urged to take note of the specific incentives related to the proposed measures under NAP 2020 that are applicable to their projects in light of the technologies transforming the industry and its impact on market trends.


With a diversified automotive industry ecosystem, Malaysia offers vast and attractive opportunities for investors. The Malaysian Government encourages investments in areas such as:-




Critical components (e.g. engines, transmissions and chassis)




Auto electronic components (e.g. engine management system and vehicle intelligence system)



Fuel efficient engines and alternative fuel engines



Modular manufacture/systems integration



Research and development to enhance domestic technical skills and engineering capabilities

In April 2021, the Malaysian Government announced an extension and enhancements to the Incentives for Automotive Industry that were previously introduced in 2017. The main objective of the extension and enhancements is the promotion of Energy Efficient Vehicles, with additional activities included such as NxGV, electric vehicles and related components, core and critical components such as engines, powertrains, Light Detection and Ranging (LIDAR), Radio Detection and Ranging (RADAR) and Advanced Driver Assistance Systems (ADAS) to align with NAP 2020.

The extension and enhancements also serve to encourage the growth of domestic automotive industry players and vendors, besides attracting new investments into the country. These include:

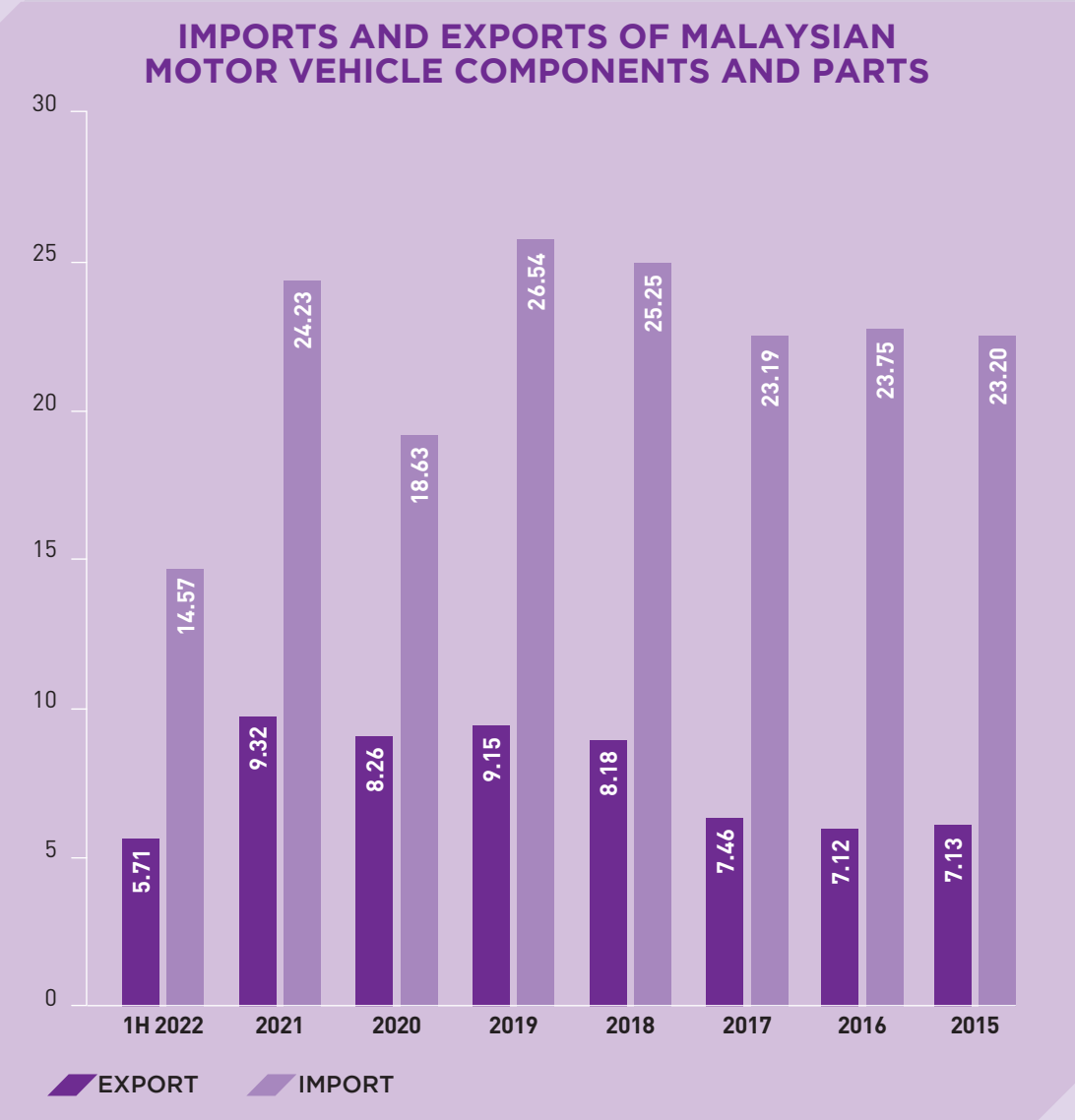
- Nurturing local companies in terms of technology capabilities, certification, human capital development and others.
- Utilising or supporting local industries/services.
- Supporting engineering and manufacturing companies such as special processing activities, jig and tooling manufacturers, components and parts manufacturers and engineering design companies.

The enhancements are timely for the domestic automotive industry in light of the rapid evolution of the ASEAN automotive landscape, with the governments of the region implementing policies to attract investments, especially for EVs. The extension and enhancements to the incentive for the automotive industry will position the domestic automotive industry firmly in the region as a hub for energy efficient vehicles while encouraging local companies to expand their supply chain across the region by adopting technology and moving up the value chain.

# A GROWING AUTOMOTIVE PARTS AND COMPONENTS SECTOR

Malaysia is a production centre for major manufacturers of automotive components, with about 641 such manufacturers based in the country. These manufacturers produce a wide range of components, such as body panels, brake parts, engine parts, transmission and steering parts, rubber parts and E&E parts. These automotive suppliers are encouraged to upgrade their skills and technologies in tandem with the EV technologies.

The automotive industry’s manufacturers of components and parts include both foreign MNCs and domestic companies. Foreign MNCs with operations here include Delphi Technologies PLC, ZF Friedrichshafen AG, Robert Bosch GmbH, Continental AG, Denso Corporation and Akashi Kikai Industry Co. Ltd. Domestic companies include APM Automotive Holdings Berhad, DRB-HICOM Berhad, Inokom Corporation Sdn. Bhd., Ingress Corporation Berhad, Sapura Automotive Industries Sdn. Bhd., Naza Automotive Manufacturing Sdn. Bhd., MBM Resources Berhad, Delloyd Ventures Berhad and Tan Chong Motor Holdings Berhad. These companies supply to both the domestic and regional OEM markets, with Thailand and China among major export destinations.





# BENEFITING FROM STRONG ENGINEERING SUPPORTING INDUSTRIES

The rapid development of industries such as engineering support, mould and die, metal casting, metal stamping, surface treatment, finishing and heat treatment have been supportive of the development of the value chain related to the automotive industry.

## MOULD & DIES

The mould and die companies catering to the automotive industry are capable of manufacturing specific types of moulds, dies and tooling equipment to meet the demands of the industry.



## MACHINING

The companies undertaking specialised precision machining ranges from small machining workshops to state-of-the-art machining centres with capabilities in minute precision gears and shafts for engine and transmission parts.



## METAL SURFACE TREATMENT/ FINISHING

The metal surface treatment/finishing industry provides a variety of plating services, such as batch and continuous electroplating, precision electroplating, electroless plating, functional electroplating, cathodic electrodeposit, dacrotised treatment, phosphating, passivation, anodising and chromating.



## 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. The die-casting companies supply the automotive industry with die-cast parts and components, such as front and rear wheel hubs, front and rear brake panels and alternator housing and engine parts such as crank cases, crank case covers and cylinder head covers.



## HEAT TREATMENT

The heat treatment industry offers a range of services such as continuous mesh-belt heat treatment, vacuum hardening, carburising, 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.



## METAL STAMPING

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



## REGIONAL OPPORTUNITIES UNDER THE ASEAN FREE TRADE AREA (AFTA)

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 zero per cent and five (5) per cent respectively. For vehicles from non-ASEAN countries, the import duties on CKD vehicles have been reduced to 0-10 per cent while import duties on CBU vehicles have been reduced to 30 per cent. 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:

Investors should note that trade liberalisation within ASEAN has opened up a vast regional market, providing export opportunities for automotive and component manufacturing companies. They should also take note of how basing their regional operations in Malaysia, which has a competitive cost structure and well-developed infrastructure, enables them to make inroads into the rest of the lucrative ASEAN market. In addition, carmakers will be able to source cost-competitive components from ASEAN countries and benefit from potential economies of scale.



### IMPORTS FROM ASEAN COUNTRIES

|                 | IMPORT DUTIES | EXCISE DUTIES |
|-----------------|---------------|---------------|
| CKD vehicles    | 0%            | 60-105%       |
| CBU vehicles    | 0%            | 60-105%       |
| CKD motorcycles | 0%            | 20-30%        |
| CBU motorcycles | 0%            | 20-30%        |

Source: Malaysian Automotive Association (MAA)

### IMPORTS FROM NON-ASEAN COUNTRIES

|                 | IMPORT DUTIES | EXCISE DUTIES |
|-----------------|---------------|---------------|
| CKD vehicles    | 10%           | 60-105%       |
| CBU vehicles    | 30%           | 60-105%       |
| CKD motorcycles | 10%           | 20-30%        |
| CBU motorcycles | 30%           | 20-30%        |

Source: Malaysian Automotive Association (MAA)







# ASEAN TOTAL AUTOMOTIVE SALES AND PRODUCTION

## MOTOR VEHICLES

| COUNTRY   | 2020             |                   | 2021             |                   |
|---|------------------|-------------------|------------------|-------------------|
|   | SALES (UNIT)     | PRODUCTION (UNIT) | SALES (UNIT)     | PRODUCTION (UNIT) |
| Indonesia        | 532,027          | 690,150           | 887,202          | 1,121,967         |
| Thailand         | 792,146          | 1,427,074         | 754,254          | 1,685,705         |
| <b>Malaysia</b>  | <b>529,514</b>   | <b>485,186</b>    | <b>508,911</b>   | <b>481,651</b>    |
| Philippines      | 223,793          | 67,297            | 268,488          | 83,846            |
| Vietnam          | 296,634          | 165,568           | 304,149          | 163,271           |
| Singapore        | 56,423           | 0                 | 58,953           | 0                 |
| Brunei           | 12,505           | 0                 | 0                | 0                 |
| Myanmar         | 17,707           | 10,753            | 9,350            | 1,956             |
| <b>ASEAN (Total)</b>  | <b>2,460,749</b> | <b>2,846,028</b>  | <b>2,791,307</b> | <b>3,538,396</b>  |

## MOTORCYCLES AND SCOOTERS

| COUNTRY   | 2020             |                   | 2021             |                   |
|---|------------------|-------------------|------------------|-------------------|
|   | SALES (UNIT)     | PRODUCTION (UNIT) | SALES (UNIT)     | PRODUCTION (UNIT) |
| Thailand         | 1,516,096        | 1,615,319         | 1,606,481        | 1,780,654         |
| Philippines      | 1,206,374        | 631,370           | 1,435,677        | 867,453           |
| <b>Malaysia</b>  | <b>498,327</b>   | <b>494,490</b>    | <b>497,262</b>   | <b>496,136</b>    |
| Singapore        | 10,544           | 0                 | 11,428           | 0                 |
| <b>ASEAN (Total)</b>  | <b>3,231,341</b> | <b>2,741,179</b>  | <b>3,550,848</b> | <b>3,144,243</b>  |

Source: Malaysian Automotive Association (MAA) & ASEAN Automotive Federation (AAF)

# SUCCESS STORY

Malaysia is the third largest automotive market in ASEAN, making the automotive industry a strategic part of the country's manufacturing sector. Furthermore, Malaysia's EV and EV-related technology ecosystem is rapidly developing to meet global demand as public sentiment shifts toward a more sustainable-centric orientation.

The automotive industry in Malaysia contributes about RM40 billion or four (4) per cent of Malaysia's GDP, with a workforce close to 700,000 people, an estimated 53,000 aftermarket establishments, and more than 600 parts and components suppliers.

(Source: National Automotive Policy (NAP) 2020 booklet).

The ASEAN Electric Vehicle Market was valued at US\$498.93 million in 2021 and is expected to reach US\$2.7 billion by 2027, registering a CAGR of 32.73 per cent during the forecast period (2022 - 2027).

(Source: mordorintelligence.com, 2021)

By 2025, it is estimated that 20 per cent of the Total Industry Volume (TIV) of Southeast Asian countries will comprise EVs.

(Source: International Renewable Energy Agency)

It is projected that the Asia-Pacific luxury car segment market is poised to register a CAGR of over 6.40 per cent over the forecast period of 2018-2027.

(Source: mordorintelligence.com)



Malaysia has a large and prosperous market for the luxury car segment in the ASEAN region. This has been proven by the number of luxury car manufacturers present in Malaysia such as Mercedes, BMW, Porsche and Volvo. These manufacturers have set up their assembly plants in Malaysia to meet local demand and to become the export hub for luxury cars in the ASEAN region.

Volvo Car Malaysia, as part of its electrification plan, is the first luxury car brand to locally assemble EVs in the country and in fact, has made Malaysia its ASEAN EV hub. Volvo Car Malaysia's manufacturing facility in Shah Alam, Selangor has produced almost 200,000 vehicles this year, including the XC40 model, which is part of its EV range.



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