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Your investment window into Malaysia



A MIDA Publication for Global Investors

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## ELECTRICAL AND ELECTRONICS (E&E) INDUSTRY

# ELECTRICAL AND ELECTRONICS (E&E) INDUSTRY - GROWING AND CHANGING

**M**alaysia's manufacturing sector continues to grow and transform as the country substitutes low value-added assembly operations for high value-added activities that promise long-term growth.

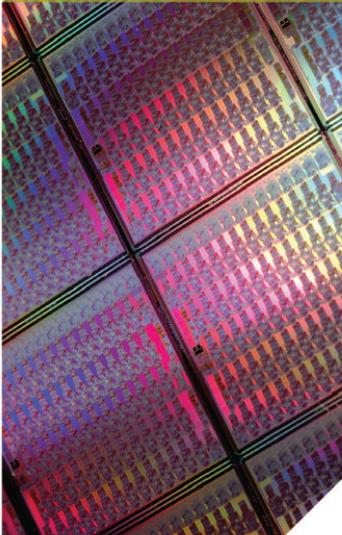
A total of 787 manufacturing projects with investments of RM52.1 billion were approved in 2013 compared with 804 manufacturing projects with investments of RM41 billion in 2012.

Within the sector, the Electrical & Electronics (E&E) industry recorded the highest investments approved in 2013 with 118 projects amounting to RM9.8 billion.

Of this total, 44 projects were new projects with investments of RM6.8 billion while 74 were expansion/diversification projects with investments amounting to RM3 billion.

## MAJOR E&E ECOSYSTEMS IN MALAYSIA

### SEMICONDUCTORS



The International Data Corporation (IDC) forecasts worldwide semiconductor revenue to improve by 2.9 per cent year-over-year in 2014 to US\$329 billion and to reach US\$366 billion in 2017. This growth will come mostly from strong demand for memory and logic products and an increase in semiconductor content in automobiles and high-end smartphones. This trend towards the "Internet of Things" (IoT) will see sustained growth in the manufacturing of sensors and MEMs in which local players like Globetronics and Silterra already have an established presence.

### SOLAR



Despite a global oversupply and prolonged industry consolidation, new solar photovoltaics installations accounted for almost 30 per cent of all new electricity generation capacity in 2012. The European Photovoltaic Industry Association (EPIA) believes that the industry can expect to resume its annual growth trajectory of 10-15 per cent. Malaysia is consolidating its position as one of the world's largest solar panel producing nations and is focused on completing the solar value chain and cluster, especially in the production of solar materials and balance-of-systems for smart grid solar systems such as batteries and inverters.

### LED TECHNOLOGIES



The move by the Malaysian Government to phase out the use of incandescent lights and the launch of the Green Technology Financing Scheme (GTFS) in 2010 have both contributed to the healthy growth of Malaysia's LED industry. Increasing awareness on energy efficiency has also encouraged the adoption of LED technology in various applications such as tablets, smartphones and illumination products. General lighting applications utilising LED technology is expected to be the main growth driver. This has induced further expansions and new investments in projects related to the LED / solid state lighting (SSL) sub-sector.

Foreign investments accounted for 86.7 per cent of the total (RM8.5 billion), with domestic investments accounting for the rest. Most of the foreign investments into the E&E sector came from the USA and Singapore.

As Malaysia moves forward, the E&E segment is focused on deepening and strengthening the three major ecosystems of semiconductors, solar and LED technologies.

Semiconductors are expected to continue spearheading the growth of the E&E industry in Malaysia and will continue to benefit from growing global demand in the usage of mobile

devices (smartphones, tablets), storage devices (cloud computing, data centres, personal data drives), optoelectronics (photonics, fibre optics, LEDs) and embedded technology (integrated circuits, PCBs, LEDs).

"According to the International Data Corporation (IDC), Semiconductor revenues worldwide will improve by 2.9% year-over-year in 2014 to US\$329 billion and is forecasted to reach US\$366 billion in 2017. The growth will come mostly from strong demand for memory and logic products and an increase in semiconductor content in automobiles and high end smartphones

as the world moves towards the Internet of Things (IoT)," said Datuk Phang Ah Tong, Deputy Chief Executive Officer of MIDA while presenting his paper at the Singapore SEMICON 2014 recently.

"The rise of IoT will lead to sustained growth in the manufacturing of sensors and Micro-electromechanical systems (MEMS) in which local players in Malaysia like Globetronics and Silterra already have an established presence," he added.

### SUB SECTORS

Last year, the electrical sub-sector attracted the lion's share of investments within the E&E sector by raking in 51 approved projects involving investments of RM5.3 billion.

Of these, 28 were new projects and 23 were expansion/diversification projects. Most of the investments (RM4.5 billion) into this sub-sector came from foreign sources (84.9%) with domestic investments making up the rest (RM803.4 million).

The 51 projects are expected to generate employment opportunities for 7,954 people.

The solar sub-sector in particular made an exceptionally strong show in 2013 and accounted for 75.7 per cent of the total investments approved in the electrical sub-sector.

Although further consolidation in the solar PV manufacturing sector is expected throughout 2014 globally, these investments will nonetheless strengthen the solar PV industry in Malaysia and provide opportunities for industry players with profitable

business models to gain market share.

The dramatic reductions in cost in recent years will also help the solar PV industry regain its footing on the international market. Malaysia's continuous efforts to promote growth and to further strengthen the solar industry ecosystem in Malaysia has already led to several projects being approved with total investments of RM6.1 billion.

This is an indication that the industry still believes in the future of the solar industry, albeit with further improvements in technology and cost parity with other sources of energy.

In 2013, the most significant projects approved are all foreign-owned, including a new RM2.8 billion facility to manufacture highly efficient silicon photovoltaic wafers, cells or modules. Other new projects include a RM1.8 billion plant to manufacture thin film solar photovoltaic (PV) modules and a RM1.2 billion facility to manufacture solar silicon ingots and wafers.

All together, these new projects will create 3,196 new job opportunities within the solar industry cluster.

The industrial electronics sub sector attracted the second largest share of investments into the E&E sector in 2013 (27%) with approved investments totalling RM2.6 billion in 17 projects.

Most of these projects involve expansions/diversifications (11 projects) amounting to RM813.6 (31.4%) million, while the rest are for new projects with investments totaling RM1.8 billion (68.6%).

Almost all of the investments in this sub-sector are from foreign sources, the most significant of which involves

an RM320 million expansion/diversification project to design, develop and produce optical fibre communication products, laser components, modules and sub-systems.

This project is expected to create additional employment opportunities for 200 people. Another expansion/diversification project will involve investments of RM186.6 million to design, develop and manufacture PCB assemblies and sub-assemblies for industrial and consumer electronics applications.

The electronic components sub-sector won the third largest share of investments in the E&E sector last year with RM1.8 billion (18.3%).

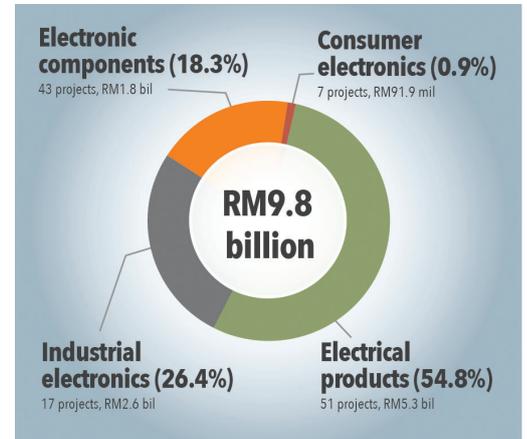
Of the total investments approved, foreign investments amounted to RM1.4 billion (77.1%), while domestic investments totaled RM416.2 million (22.9%).

Seven applications involving investments of RM226.2 million were for new projects, while 36 applications (RM1.5 billion) were for expansion/diversification.

Most of the projects approved in this sub-sector were for the production of semiconductor devices, PCB assemblies, copper wires and silicon wafers.

Indeed, semiconductor devices have been a leading export product of Malaysia's E&E industry for over three decades.

**INVESTMENTS IN APPROVED MANUFACTURING PROJECTS IN THE E&E INDUSTRY BY SUB-SECTOR, 2013**



In 2013, semiconductor devices accounted for 41.2 per cent (RM97.8 billion) of the country's total E&E exports.

An emerging trend among fabless and fablite semiconductor companies is to set up R&D facilities alongside their manufacturing operations so that they can leverage onsite integrated circuit design capabilities.

The presence of IC design firms such as MyMs and Symmid strengthens the semiconductor ecosystem and allows the industry to exploit Malaysia's burgeoning financial, halal and LED markets. More IC design firms and fables companies are needed to create a wider set-up of new technology and products.

The most significant projects approved within the electronic components sub-sector in 2013 were both expansion projects.

The first is a RM126 million project by a wholly foreign-owned company to set up an assembly and test facility for integrated circuits, while the other involves investments amounting to RM114.8 million by a wholly Malaysian owned company to expand its high-end semiconductor components manufacturing plant.

In 2013, a total of seven projects were approved in the consumer electronics sub sector with investments of RM91.9 million, most of which came from domestic sources. Three of these projects are new and accounted for 33.4 per cent of total investments, while the rest are expansion diversification projects.

**STRUCTURE OF THE E&E INDUSTRY**

Sectors	Sub-sectors	Examples of products
Electronics	Components	Semiconductors, passive components, printed circuit boards, metal stamped parts and precision plastic parts.
	Consumer	Audio visual products such as television receivers, portable multimedia players (PMPs), speakers, cameras and electronic games.
	Industrial	Multimedia and information technology products such as computers and computer peripherals, telecommunications equipment, office equipment and boxes built products for industrial applications.
Electrical		Distribution boards, control panels, switching apparatus, lightings, Electrical transformers, cables and wires, primary cells and batteries, solar cells and modules, air conditioners and household appliances.

# ABIO ORTHOPAEDICS GOES GLOBAL



## Medical devices are one key industry helping Malaysia to ascend world competitiveness rankings.



The global market of orthopaedic components was worth RM130 billion in 2011. The figures are growing.

About 80% of these devices are consumed in the developed markets of USA, Europe and Japan. Currently, the global market is largely dominated by ten multinational orthopaedic companies.

Due to rising costs, these companies are relying increasingly on certified contract manufacturers outside Western Europe and the United States for production.

Naturally, the ability to offer the manufacturing of orthopaedic devices and solutions at internationally competitive prices can make Malaysia a very attractive outsourcing location for American, European, Japanese and Chinese orthopaedic original equipment manufacturers (OEMs).

Capitalizing on this growing opportunity, Apex Healthcare established a joint venture with 40% equity in ABio Orthopaedics Sdn Bhd to contract manufacture surgical instrument, external fixation devices, internal fixation devices, artificial joints and dental implant.

This, the company reckons, will expand the scope of contract manufacturing for orthopedic devices involving a total manufacturing solution

- advanced machining, titanium anodising, forging, coating and casting.

In addition, the extensive R&D and high value added feature of this project are significant in portraying the growing local capabilities.

ABio Ortho also enables Apex Healthcare to add a new engine of growth in addition to its existing pharmaceutical manufacturing and distribution businesses, increasing opportunities while diversifying risk.

Today, ABio Ortho contract manufactures surgical grade orthopaedic devices, components and surgical instruments. Orthopaedic components (e.g. screws, plates, implants, intra-medullary nails, pins, external fixators) are used in the surgical treatment of musculoskeletal disorders resulting from trauma, disease, injuries or deformities.

Soon after its formation, ABio Ortho received another good news. The Malaysian Government through its agency, PEMANDU has identified the contract manufacturing of orthopaedic components as an activity of the Healthcare National Key Economic Area to be supported under the Economic Transformation Programme (ETP).

On March 5, 2013, ABio Orthopaedics Sdn Bhd was officially endorsed as an EPP under the Healthcare National Key Economic Area under PEMANDU.

This project, with an investment of RM304.7 million) has the potential to place Malaysia as an attractive outsourcing location for the global orthopedic original equipment

manufacturers (OEMs), in line with the EPP 9: Hub for High Value Medical Devices Contract Manufacturing under the Healthcare National Key Economic Areas (NKEA).

An 80,000 square feet factory in Prai Industrial Estate, Butterworth, has been leased and renovations are in progress. Penang has been selected as the location for a number of good reasons, mainly its proximity to its partner Straits Orthopaedics in providing the early technical support to ABio Ortho.

Production equipment have been progressively installed from March 2013 and staff recruitment and training is in progress.

The rough timeline of completion is set out as follows:

- ❖ Phase 1 (Advanced machining and titanium anodizing type 2) completed 2013
- ❖ Phase 2 (Forging) will be completed in 2014
- ❖ Phase 3 (Coating) will be completed in 2014
- ❖ Phase 4 (Casting) will be completed in 2015

As it moves forward, ABio Ortho not only provides a strategic avenue for Apex Healthcare to venture into the field of medical devices business segment globally, but it also complements the other business groups of Apex Healthcare to further expand the scope of the business to cover more facets of healthcare; encompassing pharmaceuticals, diagnostics, consumer health care products, and medical devices. 

### ABio Orthopaedics At A Glance

<b>Project Cost</b>	RM304.7 million
<b>Manpower</b>	Total – 1,472 (1,422 Malaysians, 50 Foreign) ■ 795 knowledge workers, inclusive of 48 engineers ■ 795 skilled workers
<b>Salary above RM3,000</b>	54% (795)

# A ROUNDTABLE MEETING WITH SELANGOR COMPANIES



analysts have been speculating that some momentum in Japan will create more excitement on TPPA and probably put pressure on Malaysia to compromise some issues," he added.

However, Dato' Sri Mustapa pointed out, there were many things within TPPA that were not resolved yet.

"We have more issues compared to other countries," he said.

In an effort to gather feedback from industry players on matters related to the progress and development of the industries in Malaysia, a Roundtable Meeting with companies operating in Selangor was held on April 21, 2014, at Concorde Hotel, Shah Alam.

The meeting, which was organised by the Malaysian Investment Development Authority (MIDA), was chaired by Dato' Sri Mustapa Mohamed, Minister of International Trade and Industry (MITI).

"It is important for us to always stay in touch with companies and understand their operations and challenges in growing their companies in Malaysia. The feedback we received helps us to fine tune our policies and measures. This regular interaction also helps us to develop a progressive ecosystem to promote investments in the country," said Dato' Sri Mustapa.

The meeting was attended by 19 companies and associations as well as 27 delegates from MITI and agencies and States Agencies including Majlis Tindakan Persekutuan Negeri Selangor (MPTNS), Selangor State Development Centre, Gas Malaysia Bhd, Tenaga Nasional Bhd, Syarikat Bekalan Air Selangor and the Federation of Malaysian Manufacturers.

Other companies that attended the session were Perusahaan Otomobil Kedua Sdn Bhd, Haco Asia Pacific Sdn. Bhd; Pharmaniaga Bhd; O.Y.L Manufacturing Company Sdn. Bhd. and

Sipro Plastic Industries Sdn. Bhd.

Last year, Selangor drew in RM9.8 billion in total approved manufacturing investments, the second highest amount after Penang.

Dato' Sri Mustapa said all of the manufacturing investments are to be implemented this year, which are expected to generate some 24,000 new jobs.

Of this amount, domestic investments accounted for RM6.2 billion or 63.1% and foreign investments took the remaining RM3.6 billion of 36.9%.

Investments approved were mainly for transport equipment (RM320 million), rubber products (RM230 million) and food manufacturing (RM793 million).

During the meeting, the Minister also assured the delegates that Malaysia would not be under pressure to quickly conclude the discussions on Trans-Pacific Partnership (TPP) following US President Barack Obama's visit on April 26-28.

Dato' Sri Mustapa said the visit would not just discuss about trade and investment but also other fields – education, diplomacy, regional collaboration, defence and security.

"I know several

In addition, Dato' Sri Mustapa said there were domestic process such as cost-benefit analysis of the TPPA that was still in progress.

The analysis was done in stages by the Institute of Strategic & International Studies, Bumiputera Agenda Steering Unit in the Prime Minister's Department and PricewaterhouseCoopers. The analysis studied the impact on Bumiputeras, small and medium enterprises and national interest including geopolitics, diplomacy and sociopolitics.

"The analysis is very important in setting the tone for domestic and parliament debate," he said.

To date, MITI has conducted over 50 engagements on TPPA with various stakeholders from non-governmental organisations, members of Parliament, media, university students, business association, industry groups, civil society, academia and individuals.



# MIDA'S COUNTRY SESSION AT OTC ASIA 2014 A SUCCESS



Minister Of International Trade and Industry Dato Sri Mustapha Mohamad visiting one of the booth at OTC 2014. On his right is MIDA CEO Dato Azman Mahmud

**M**ore than 150 potential investors including international participants attended the Malaysian Investment Development Authority's (MIDA's) Country Session at the Offshore Technology Conference (OTC) Asia 2014.

The Session, themed "Malaysia as a Regional Oil and Gas Hub", held at the Kuala Lumpur Convention Centre, was moderated by Dato' Azman Mahmud, Chief Executive Officer (CEO) of MIDA.

The Country Session featured panellists from Technip, Petrofac, Honeywell Process Solutions and Kencana Petroleum who are leading experts in the industry.

"As the principal sponsor for OTC Asia 2014, we see this event as a perfect platform for investors to gain first-hand information and insights on the challenges and opportunities in Malaysia as a regional oil and gas hub in Asia," said Dato' Azman.

He pointed out that Malaysia has a very strong ecosystem of services and manufacturing companies that support the needs of oil and gas value chain both domestically and regionally.

"We also have the advantage of the geographical location and large hydrocarbon reserves, which will make Malaysia an ideal base for expanding into

Asia's oil and gas markets."

"Major efforts made by companies particularly PETRONAS which include the development of the Refinery and Petrochemical Integrated Development (RAPID) in Pengerang, Johor and the Sabah Ammonia Urea (SAMUR) project in Sipitang that involve investments of more than RM65 billion will create growth in volume of premium specialty chemicals industry in Asia-Pacific region," he added.

According to Dato's Azman, MIDA, being the first point of contact for investors will continue to collaborate with all its stakeholders to ensure Malaysia's investment climate remains attractive for businessmen to not only conduct their normal business activities, but also expand and diversify their existing operations.

"In line with Malaysia's aspiration to be the number one oil and gas (O&G) hub in the Asia Pacific region by 2017, we are positioning Malaysia's vibrant O&G industry as the platform for world-class companies to be a key component in the O&G ecosystem in Malaysia. The synergetic development of upstream and downstream activities

provides opportunities in strategic petrochemical industries and has unleashed unprecedented demand for services in the whole value chain of the O&G industry," he said.

Dato' Azman said that Malaysia recognises the need to further develop technical experienced talent, specifically engineers, geosciences professionals and specialized supervisory and trades categories.

To address the requirement, Malaysia has established several specific talent development programmes in the oil and gas sector in the country and these programmes are being conducted in various Ministries and agencies such as the Industry Centre of Excellence (ICoE) by the Ministry of Education, Malaysia, and Structured Internship Program (SIP) by TalentCorp, in collaboration between the Malaysia Petroleum Resources Corporation (MPRC) and the University of Technology Malaysia (UTM).

Currently, there are 13 institutes of higher learning and 4 skills training centres that offer oil and gas related courses in Malaysia such as the state of the art simulation, engineering fields, marine technology, enhanced oil recovery and deep water technology.

During the four-day conference, MIDA, together with MATRADE, also participated in the Malaysia Pavilion together with 25 Malaysian companies which showcased Malaysia's home grown products and services.

MIDA was allocated 18m2 of exhibition space. MIDA received a total of 240 visitors at the booth.

Offshore Technology Conference (OTC) Asia is a new edition of the OTC event held annually in Houston, Texas, USA. The next OTC Asia is scheduled to be held on 22-25 March 2016 at Kuala Lumpur Convention Centre, Malaysia. 



Dato' Azman Mahmud giving his speech during A Country Session at OTC 2014

# SR TECHNICS SETS UP REGIONAL HUB IN SHAH ALAM

**S**R Technics, a unit of Mubadala Aerospace MRO (maintenance, repair and overhaul) network, opened its first Asia Pacific facility with component repair capabilities in Shah Alam, Selangor recently.

With the new regional facility, officially opened by Selangor Menteri Besar Tan Sri Abdul Khalid Ibrahim, the company aims to have a global footprint with Malaysia as its Asian hub.

The company is based in Zurich, Switzerland, and it is a leading provider of MRO services for airframes, engines and components.

The new Shah Alam facility will maintain aviation components such as pneumatic, hydraulic and mechanical accessories as well as electrical and specific avionic components.

By 2015, the facility will be able to maintain some 1,200 different aircraft components, of which all of them will be sourced from SR Technic's Zurich facility

General Manager Heinz Freimann said the company will serve as a service

centre for its airline clients in the region should they need a component to be repaired.

At the same time, the company will also serve the worldwide market by transferring know-how from its existing business in Switzerland to Malaysia as it already has an existing long-term contract.

"This is our first facility with our own component and repair capabilities in the Asia-Pacific region," he added. 



SR Technics Malaysia general manager Heinz Freimann (centre) briefing Selangor Menteri Besar Tan Sri Abdul Khalid Ibrahim (right) after the launch of the company's facility in Shah Alam.

## A NETWORKING SESSION WITH LOCAL AND OVERSEAS COMPANIES



Mr Jaswant Singh (second from left) with other panelists during the networking session.

**M**alaysia Investment Development Authority's Infrastructure and Industry Services Division held a networking session with local and foreign chambers, associations and business councils on April 16, 2014.

The session was organised to convey updated information and offer clearer picture of latest issues particularly in areas like GST implementation, foreign workers

application procedure and incentives for Energy Efficiency uptake.

The session, held at MIDA's Dewan Perdana, was chaired by MIDA's Executive Director for Investment Ecosystem Mr Jaswant Singh.

At the session, Mr Jaswant Singh was joined by speakers Mr Mohd Khairuddin bin Muslihan of the Immigration Department, Mrs Fazilah Ariff of the Royal Malaysian Customs Department and Mr Ahmad Khairuddin

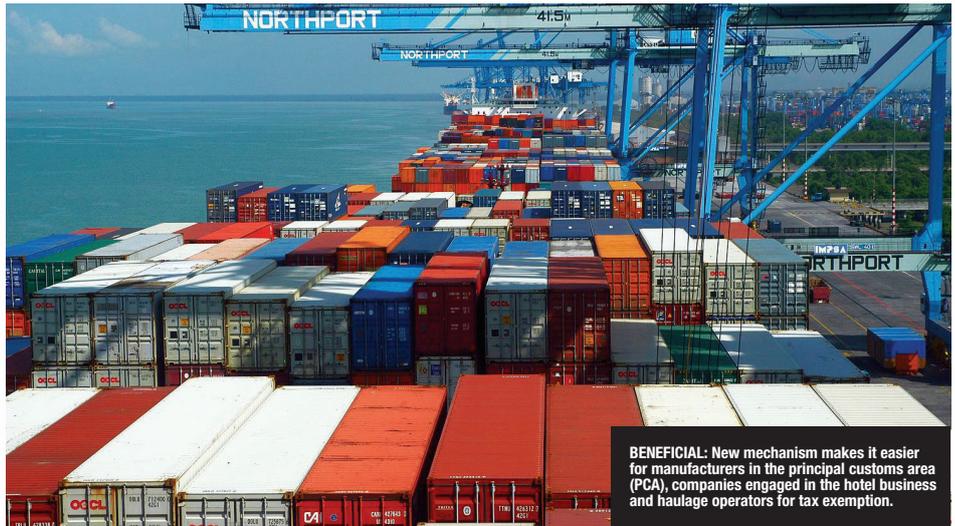
Abdul Rahim, MIDA's Director of Clean Technology and Environment Management Division.

About 60 organisations were invited, of which 96 participants from 35 business chambers, associations and council attended the networking session. In addition, about nine government agencies also participated.

The feedback has been very encouraging where lots of questions were posed by those attending during the question and answer session.

Moving forward, MIDA's Infrastructure and Industry Services Division intends to conduct the Networking Session programme regularly in the future with the aim of having more participation from both private and public sectors such as Energy Commission, National Water Services Commission, Telekom Malaysia Berhad and others. 

# SELF-DECLARATION MECHANISM TAKES EFFECT



**BENEFICIAL:** New mechanism makes it easier for manufacturers in the principal customs area (PCA), companies engaged in the hotel business and haulage operators for tax exemption.

**T**he implementation of the Customs Duties (Exemption) Order 2013 and Sales Tax (Exemption) Order 2013, a new self-declaration mechanism that simplify the granting of import duty and/or sales tax exemption, takes effect on May 2, 2014.

The Malaysian Investment Development Authority (MIDA) said the mechanism would benefit

manufacturers in the principal customs area (PCA), companies engaged in the hotel business and haulage operators for tax exemption.

“Under this new self-declaration mechanism, a company is required to submit a confirmation letter issued once by MIDA together with the list of machinery, equipment, spare parts, consumables,

prime movers and container trailers to be imported or purchased to the Royal Malaysian Customs Department (Customs) for permission to claim the exemption.

“The companies would be able to obtain the permission within a period of two weeks from the date of complete submission received by the Customs,” MIDA said.

MIDA said the business process re-engineering effort was undertaken in collaboration with the Ministry of International Trade and Industry, Ministry of Finance and the Customs.

It said an application would require a processing period of four weeks from the date of complete information received. 

**T**he Malaysian Investment Development Authority (MIDA) collaborated with the National University of Malaysia or Universiti Kebangsaan Malaysia (UKM) in organising a Career Fair to provide a platform for companies to recruit local graduates in the fields of Engineering, Science and Technology, IT and other fields.

The Career Fair, held in early April, took place at the foyer of Dewan Canselor Tun Abdul Razak (DECTAR), UKM. The event provided networking opportunities for students and job seekers to explore internship and career opportunities with the industries.

It also enabled direct channelling of university graduates to projects approved by MIDA.

Leveraging on its close network with the vibrant industry sector, MIDA has brought together 19 companies, which include Silterra, On Semiconductor, Nippon Electric Glass and APM Automotives to participate in this event, with a total of 322 vacancies and job opportunities offered. More than 50% of the job opportunities are in the technical fields.

According to Dato' Azman Mahmud, Chief Executive Officer of MIDA, through this platform, companies and industries will be able to have the first hand contact with the academia in enhancing the curriculum of the relevant courses in order to churn out an industry-ready stream of talent for identified Engineering, Science and Technology and ICT sectors.

“Since early 2013, our

## MIDA ENGAGES 19 COMPANIES AT UKM'S CAREER FAIR



**DATO' AZMAN MAHMUD:** Newly established Industry Talent Management Division has been actively addressing the issue of mismatch in the supply and demand of talent.

newly established Industry Talent Management Division has been actively engaging stakeholders in various segments namely the policy makers, the industries and the education/training providers to address the issue of mismatch in the supply and demand of talent. We have established a Focal Point Network to meet investors' demand for greater visibility into Malaysia's supply of talent. Under this approach, MIDA collaborates and forms

smart partnerships with relevant stakeholders and leverages on existing talent development programs to assist companies,” he added. 

# MIDA Worldwide Network

The Malaysian Investment Development Authority (MIDA) is the government's principal agency for the promotion of the manufacturing and services sectors in Malaysia. MIDA assists companies intending to invest in the manufacturing and services sectors, as well as facilitates the implementation of their projects. The wide range of services provided by MIDA include providing information on the opportunities for investments, as well as facilitating companies which are looking for joint venture partners.

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