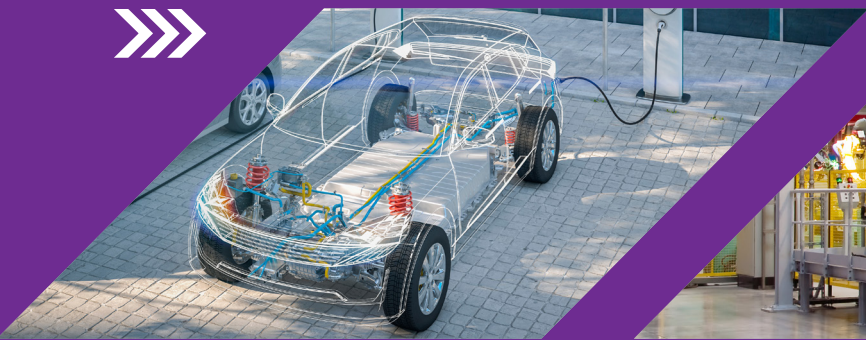


MALAYSIA-YOUR SOUTHEAST ASIAN AUTOMOTIVE HUB



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SUCCESS STORY

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 to have nurtured automotive companies producing vehicles 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 experienced significant growth with the establishment of Proton Holdings Berhad (Proton) in 1985 and Perusahaan Otomobil Kedua Sdn. Bhd. (Perodua) in 1992. Both of 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 ownership rates 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), Dr. Ing. h.c. F. Porsche AG (Porsche) and many more. 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., Marelli Automotive, Denso Corporation and Robert Bosch GmbH.

PASSENGER & COMMERCIAL VEHICLES REGISTERED IN MALAYSIA FOR THE YEAR 2012 TO 2022 AND 3rd HALF OF 2023

Table 1: Details of Malaysia's Total Industry Volume (TIV) 2012-2022 and Q3 2023

YEAR	PASSENGER VEHICLES (UNIT)	COMMERCIAL VEHICLES (UNIT)	TOTAL VEHICLES (UNIT)
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
2022	641,773	78,885	720,658
Q3 2023	512,852	58,915	571,767

PASSENGER & COMMERCIAL VEHICLES PRODUCED AND ASSEMBLED IN MALAYSIA FOR THE YEAR 2012 TO 2022 AND 3rd HALF OF 2023

Table 2: Details of Malaysia's Total Production Volume (TPV) 2012-2022 and Q3 2023

YEAR	PASSENGER VEHICLES (UNIT)	COMMERCIAL VEHICLES (UNIT)	TOTAL VEHICLES (UNIT)
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
2022	650,190	52,085	702,275
Q3 2023	530,668	35,774	566,442

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 MOTOR VEHICLES (UNIT)	SALES OF MOTOR VEHICLES (UNIT)
2022		
PASSENGER VEHICLES	650,190	641,773
COMMERCIAL VEHICLES	52,085	78,885
TOTAL MOTOR VEHICLES	702,275	720,658
3rd Half of 2023		
PASSENGER VEHICLES	530,668	512,852
COMMERCIAL VEHICLES	35,774	58,915
TOTAL VEHICLES	566,442	571,767

The automotive industry is experiencing a significant paradigm shift, driven by technological advancements and changing consumer preferences. With the rise of electric vehicles (EVs), autonomous driving, and connected car technologies, traditional automakers are being challenged to adapt and innovate to stay competitive. The automotive landscape is transforming into a connected, electric, and autonomous future. Innovation stands as the driving force behind this transformation, with automakers investing heavily in research and development to bring cutting-edge technologies to the market. From electric powertrains to

advanced driver assistance systems (ADAS) and intelligent mobility solutions, innovation is reshaping the way we think about mobility.

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). Building upon the work of earlier iterations introduced in 2006, and reviewed in 2009, NAP 2020 aims 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 Low Carbon Mobility Blueprint (LCMB) and National Energy Transition Roadmap (NETR), Malaysia aims for xEVs to constitute for 20% of new car sales by 2030; 50% by 2040 and 80% by 2050 as well as to ramp up Malaysia's charging infrastructure, targeting 10,000 public charging stations by 2025. The New Industrial Master Plan (NIMP) 2030 and the Twelfth Malaysia Plan (12MP) strategically position our country as an EV manufacturing hub, aligning with our objective to reach net-zero greenhouse gas emissions by 2050.

Electric vehicles have emerged as a game-changer, representing a shift towards sustainable and eco-friendly transportation. As governments worldwide push for stricter emission regulations, automakers are investing

in EV technology. Advancements in high-capacity batteries, faster-charging infrastructure, and extended driving ranges has made EVs a viable alternative to traditional internal combustion engines. Collaboration between automakers and charging infrastructure providers is crucial to accelerate the adoption of electric vehicles.

To spur EV adoption, the Government welcomes investors to set up EV charging infrastructure, with the policy allowing for 100% 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 in Southeast Asia due to available infrastructure, technology, talent, and Government support as well as established supporting industries such as E&E, semiconductor, factory automation and equipment makers.

The Government has formed The National Electric Vehicle Task Force (NEVTF) to facilitate EV policy and streamline incentives towards the adoption of EVs 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 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

The Government has announced a series of incentives to promote EV ownership aligning with its commitment to support the EV ecosystem, encourage 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 2027 and full import duty and excise duty exemption for imported EVs until 31 December 2025.

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. In addition, through the Budget 2024, the government has announced Electric Motorcycle Usage Incentive Scheme of RM2,400 cash rebates for Rakyat with annual income below RM120,000.



Battery



Battery Management System (BMS)



On-Board Charging



Battery Pack & Capacity



Charging Infrastructure



Artificial Intelligence



Modular Based Battery Swapping Technology




SPECIAL TAX INCENTIVE FOR THE DEVELOPMENT OF EV CRITICAL COMPONENTS:


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 to advocate for Energy Efficient Vehicles, additional activities such as NxGV, electric vehicles and their related components, encompassing various activities. Additionally, it emphasises strengthening fundamental component 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 widened incentives for the automotive industry are poised to strategically position the domestic sector as a regional hub for energy-efficient vehicles. This initiative will not only stimulate local companies to broaden their supply chain within the region but also prompt them to embrace advanced technologies, thereby elevating their position in the value chain.

A GROWING AUTOMOTIVE PARTS AND COMPONENTS SECTOR

Malaysia serves as a significant hub for the production centre for major manufacturers of automotive components, with approximately 641 major 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 cater to both domestic and regional Original Equipment Manufacturer (OEM) markets, with significant export destinations including Thailand and China among major export destinations.

IMPORTS AND EXPORTS OF MALAYSIAN MOTOR VEHICLE COMPONENTS AND PARTS



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 significantly contributed to the development of the value chain related to the automotive industry.

MOULD & DIES

Companies in the mould and die sector serving the automotive industry, possess the capability to produce precise moulds, dies, and tooling equipment tailored to meet the industry's exacting demands.



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, dactotised 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. 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 bearings 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 well-established in Malaysia. A number of these companies undertake secondary processes, such as electroplating or spray painting, as well as 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 0 per cent and 5 per cent respectively. For vehicles from non-ASEAN countries, 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 take note of ASEAN’s trade liberalisation, which has opened up a significant 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					
		2022		2021	
COUNTRY		SALES (UNIT)	PRODUCTION (UNIT)	SALES (UNIT)	PRODUCTION (UNIT)
Indonesia		1,048,040	1,470,146	887,202	1,121,967
Thailand		849,388	1,883,515	754,254	1,685,705
Malaysia		720,658	702,275	508,911	481,651
Philippines		352,596	92,223	268,488	83,846
Vietnam		404,635	232,410	304,149	163,271
Singapore		42,550	0	58,953	0
Myanmar		7,068	3,175	9,350	1,956
Brunei		0	0	0	0
ASEAN (Total)		3,424,935	4,383,744	2,791,307	3,538,396

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

MOTORCYCLES AND SCOOTERS					
		2022		2021	
COUNTRY		SALES (UNIT)	PRODUCTION (UNIT)	SALES (UNIT)	PRODUCTION (UNIT)
Thailand		1,792,016	2,015,940	1,606,481	1,780,654
Philippines		1,564,817	934,685	1,435,677	867,453
Malaysia		680,749	685,828	497,262	496,136
Singapore		12,016	0	11,428	0
ASEAN (Total)		4,049,598	3,636,453	3,550,848	3,144,243

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 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)

It is estimated that by 2025, 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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