

Challenges and Opportunities for Malaysian Automotive Industry

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Abstract

Deliberately situated in the sentiment of South-East Asia, Malaysia deals a cost-competitive position for stock holders anticipating to fixed up offshore processes in imperative to auto production innovative technical produces in cooperation provincial and global market places. In totaling, Malaysia has a market-oriented bargain which is reinforced by pro-business administration procedures. Malaysia positions 2nd as a customer of German produces amongst the ASEAN republics. As the auto sector is the main German disseminates production, the car and separate part transfers to Malaysia account for a great fragment of the German produces that are vended in Malaysia. Numerous German auto mobile producers have previously involved in the Malaysian marketplace, but furthestmost of them activate merely in the fragment of luxury cars of the automotive segment. Corporations such as BMW and Mercedes Benz practice collecting amenities delivered by their indigenous associates. For representations that are not gathered nearby but trade in, indigenous associates with permitted documents are recycled. The delivery is accompanied by the variety vendors (for example BMW or Mercedes Benz) and vended concluded numerous traders. Liberalization of the Malaysian automotive production is predictable and is pending, and indigenous automotive companies have no alternate but to accelerate execution of all requisites for them to be modest to appearance the encounters of liberalization of the automotive production. To counter to upsurges in demand while bearing in mind discussion jeopardies necessitates world-wide construction competences. Moreover, substantial outlay for the growth of spotless vigour auto mobiles has made moveable associations amongst auto producers, undertakings, and other non-automotive units have developed conspicuous. The automotive production is under compression to discourse these grave encounters in a rapid and suitable method. In such a case a study has been conducted to know the challenges and opportunities for automotive sector of Malaysia. The study is equipped grounded on primary information and secondary information. The primary data has collected through oral interview from stalwarts of automotive industry. The secondary data is collected from the reports of international conference of automotive industry and all existing literature has collected also from internet automotive websites, auto business magazines, e-auto journals etc. Finding out the research reveals that, Malaysia is the foremost manufacturers and exporters of means of transportation fragments, auto machineries and also in Malaysia the percentage of additional car buyers are high. Ultimately, suggestions have been framed and conclusions have been drawn for the study.

Keywords: Malaysia, Automotive, Challenges, Opportunities, Industry, International automotive conference

1.0. Introduction

Malaysia is centrally situated inside the Association of South-East Asian Nations (ASEAN). Comprising of two provinces alienated by the South China Sea— the Malaysian Peninsula and the states of Sabah and Sarawak on the island of Borneo— Malaysia is an association of 13 states and three central regions. Malaysia is a self-motivated country which is constantly emerging.

Being a middle-income country, Malaysia has changed itself since the 1970s from a manufacturer of raw materials into a developing multi- sector low-cost encouraged on by extraordinary know-how, knowledge-based and principal- rigorous productions. Deliberately situated in the emotion of South-East Asia, Malaysia deals a cost-competitive position for stake holders proposing to set up off shore actions in order to production innovative industrial produces for both provincial and global marketplaces.

In totalling, Malaysia has a market-oriented bargain which is maintained by pro-business administration strategies. Malaysia is EU's instant biggest dealing significant other privileged ASEAN, after Singapore, with mutual occupation in merchandises accomplishment 31.9 billion Euros in 2010 and the EU's 22nd biggest interchange momentous further. Besides, Malaysia ranks 2nd as a customer of German auto merchandises among the ASEAN countries. As the automobile sector is the biggest German export production, the car and corresponding part exports to Malaysia account for a great fragment of the German produces that are vended in Malaysia. Several German auto producers have previously involved in the Malaysian marketplace, but greatest of them function only in the part of luxury cars of the automotive sector.

Companies such as BMW and Mercedes Benz use accumulating amenities delivered by their indigenous associates. For models that are not accumulated locally but imported, local associates with approved permits (APs) are recycled. The supply is accompanied by the brand holders (for example BMW or Mercedes Benz) and vended through numerous traders. Components and spare parts manufacturers can either goon joint venture like Continental Same tyres or setup their own industrial amenities like Malaysian Automotive Lighting, Robert Bosch, Schmitt Automotive, Vogel Size, ZF Steering etcetera. The history of the Malaysian automotive production periods back to the initial 1960s, when the Malaysian administration advanced a strategy to encourage integrated automotive industry to reinforce its manufacturing base and diminish hits dependence on the agricultural sector. The foremost objective of the elevation of the automotive industry instituted the constraint of imports, the decrease of expenditures in overseas interchange, the formation of occupation and the progress of the manufacturing segment. Even currently, the automotive production is selected to increase the nation's development procedure and to empower it to extent the position of an advanced country by 2020. The Malaysian domestic automotive production is not only one of the foremost developed segments, but also signifies substance of domestic pride.

In terms of detail and records, the sector ranks amongst the top 20 in the world and disposes of the largest passenger car market in the ASEAN region. In the 1960 and 1970s, the industry was fragmented and consisted of inefficient assembly plants. The industry's progress to a well-developed manufacturing sector with regards to motor vehicles as well as components can be traced back to numerous government incentives that were initiated in the mid-1980s and remain until today. As a result of this policy two national car projects— Proton, which commenced operation in 1985, and Perodua, which was founded in 1994 – dominate the automotive industry commanding 26% and 30% respectively of the local market. The entry of Proton in to the local automobile market resulted in massive structural changes in the industry. The industry shifted from assembly activity to manufacture of vehicles and automotive parts. The sales and the market share of Japanese cars, which had dominated the market prior to the launch of Proton, were reduced as Malaysians bought their national car. The success stories of Proton and Perodua were positively influenced by high tariffs imposed by the government. Many analysts viewed the protection policies implemented by the Malaysian government as the most intervening among ASEAN countries. Malaysia has now become one of the region's largest auto markets with vibrant production activities. Currently, there are four National Automotive Projects in Malaysia:

- Perusahaan Otomobil Nasional Bhd (Proton)
- Perusahaan Otomobil Kedua Nasional (Perodua)
- Industri Otomotif Komersial (Inokom)
- Malaysian Truck and Bus (MTB)

Furthermore nine assemblers settled down in Malaysia, among them the Naza Automotive Manufacturing Sdn. Bhd (NAZA) and Hinda Sdn. Bhd. Renowned international brands, such as BMW, Land rover, Mercedes Benz, Peugeot, Renault, Scania from Europe and Nissan, Toyota, Mitsubishi and Mazda from Japan are contracting and operating through the local Manufacturing and Assembly Plants in Malaysia in order to fulfill the local content requirements.

The National Automotive Policy (NAP):

Given the significant challenges facing the automotive industry, in particular globalization, economic liberalization and increasing competition, the Malaysian government felt that there is a need to review the strategic direction and policy frame work for the domestic automotive sector. This change towards a less regulated policy is crucial to maintain the competitiveness of the domestic automotive sector in the country and internationally and to make it thus viable in the long term.

Having this in mind, the government launched the National Automotive Policy (NAP) in March 2006, which primarily aims at progressive market liberalization. In September 2009, the NAP was revised to encourage new investments, ensure a long term sustainability of the domestic automotive industry, and ensure safety and quality of products and services and protection of the environment.

Some highlights on the revised NAP:

1) Manufacturing licence

Local assembly of luxury passenger cars above 1,800cc or priced above RM150,000 is completely liberalized. This means foreign firms are permitted to achieve developed licence and can hold 100% equity in the corporations. Nevertheless, Present strategy on the stoppage of industrial licence for renovating and collecting accomplishments is preserved.

2) Amendments to the AP System (Approval Permit).

The issuance of APs will be stopped by end 2015.

3) Incentives

Incentives such as Pioneer Status/Investment Tax Allowance for the production of dangerous modules for cars such as brake scheme and programmed

4) Safety Standards

There would be a gradual introduction of Vehicle End of Life Policy. Vehicles above 15 years will have to endure obligatory assessment during road tax regeneration.

5) Euro 4m Requirement

Implementing Euro 4m specification for petrol and diesel in 2011.

6) Tax/Duty

The Import Duty construction is up held at 0% for CKD and 5% for CBU for AFTA. As for Excise Duty, there are no modifications.

7) Imports

From June 2011, it would be forbidden to import recycled parts/components.

8) Formation of planned partnership for Proton.

The mission is on for Proton to have a calculated enterprise with an internationally recognized producer. Industrialization was the obvious choice in order to provide more jobs for the highly qualified younger populace, many of whom were science, engineering and business-related graduates. The inception of the "Heavy Industry Corp of Malaysia" (HICOM) in 1980 to spur iron and steel manufacturing in the country marked the beginning of Malaysia's industrialization process as well as the privatization of the Malaysian economy. Subsequent establishments of downstream assembling industries such as Proton Holdings Bhd, and later Perodua, HICOM Honda, HICOM-Yamaha and Modena's were with the objective of consuming the iron and steel output and other resource based manufacturing within the country. Small and medium industries mushroomed transforming raw materials into parts and components prerequisite by the amassing productions. In support of the industrialization procedure, under the "Malaysia Incorporation" concept, state-owned conveniences and facilities launches such as; power generation and supply, water supply, telecommunication, seaport operations, roads and highways operation, airport, public buildings and amenities progress and management were denationalized. The enterprises were designed at accelerating nation-building by diminishing bureaucracy, snowballing competence and accelerating progress, hereafter generating extra job openings and opportunities for private-funding involvement.

The government continued a shareholder and all new companies recognized under HICOM were endangered to governmental inspection by quality of it being the major shareholder. Achievement was important of the Malaysian privatization economy revealed by its high annual progress rates of more than eight per cent accomplished in mid 1980s. More importance was revealed by the automotive sector where the total local passenger car manufacture, which was merely 80,000 units in 1985, later achieved a total of more than 330,000 units in 1997, while total industry capacity of both passenger and commercial vehicles achieved more than 440,000 in the same year, outperforming the figures in the neighboring countries.

Capturing more than 70 per cent of the local passenger car market, both Proton and Perodua were on the road to success as major automotive players in the local division. The automotive sector then was one of the major job suppliers for the young population; praise them towards fetching skill employees capable to auxiliary augment the expansion enterprise of the nation. The rapid progress of the automotive sector was short lived by the onset of the financial crisis in Asean (Association of Southeast Asian Nations) in late 1997. Rapid depreciation of the ringgit surprised both the economists and the complete commercial community and the consequence was especially disturbing for the automotive sector which was still in a progressive stage.

Even though advanced percentage of the modules was limited, the dangerous and composite modules such as engine and transmission structure were still on the introduction list. Most enterprises to concentrate these modules were put on hold as the investment quantum required for the development of these component industries was becoming uncertain. The effect of the crisis has altogether altered the landscape of the automotive industry retarding the technological progress as well as imparting uncertainties in the local automotive financing structure and market scenario. The crisis is now history but the incident had put the government in a predicament to set the right timing to liberalize the automotive sector, acknowledging the importance of the sector towards nation building and industrialization. Liberalization of the automotive industry is forthcoming for Malaysia to sustain its durable connections within the business people in the Asean region and the world at large. It is a dangerous corresponding act between demanding to uphold and to cultivate indigenous manpower competences, following nationwide development in knowledge, engineering and technology, and to progress other necessary limitations essential for the industrialization effort, but at the same time having to expedite an open marketplace access for extra able and stronger automotive players to activate within the same market.

To withstand whatever the nation has achieved over the last 30 years, competitiveness among the local automotive players is key and as such any liberalization initiative will need to consider the prescribed desirable industrialization parameters are to the Malaysian advantage. Liberalization promises an increase in foreign direct investment, accessibility to technology licensing, and increase in consumption and export opportunity, which are all relevant to generate growth within the automotive sector. However implementation of the economic liberalization framework needs to deliberate potential impediments like augmented requirement on overseas countries, mostly in automotive engineering and technology, unprovoked growth within the automotive sector and little employment moulded for the inexperienced and semi-skilled workforce. Liberalization of the Malaysian automotive industry is predictable and is pending, and indigenous automotive companies have no substitute but to accelerate execution of all requisites for them to be economical to face the challenges of liberalization of the automotive industry. The Automotive Industry is at a serious crossroad.

While a massive marketplace is developing determined by the financial development of emerging nations, the modification to clean energy automobiles, collective with this modification of marketplaces and their requirements has developed more noticeable. In developing countries, increased competition for low-cost cars and a modification in values of technology and excellence requirements to be recognized. To react to growths in demand while bearing in mind argument menaces necessitates world-wide manufacture capabilities. Besides, important outlay for the progress of clean energy vehicles has completed movable associations between auto producers, ventures, and other non-automotive entities have become noticeable. The automotive industry is below compression to discourse these thoughtful challenges in a rapid and suitable method. In such a case a study has been conducted to know the Challenges and Opportunities available for automotive industry.

1.1. Need and Significance of the Study

The automotive industry is requiring a durable multiplier consequence on the development of a nation and henceforth is accomplished of existence the driver of financial progress.

It shows a foremost important part in emerging transport sector in one hand and support industrial sector on the further to develop quicker and thereby create an important employment openings. Also as Malaysian country opening the land edge for occupation and emerging worldwide way associations, the involvement of automotive sector in snowballing exports and imports will be meaningfully high. As automotive industry is becoming more and more consistent, the level of auto competition is growing and manufacture base of most of auto-giant corporations are being moved from the advanced nations to emerging nations to take the benefit of low cost of manufacture. It is essential and significant to study about automotive industry of Malaysia in thoughtful determinations to seize these challenges and opportunities further.

1.2. Objectives of the Study

- (i) To Examine the Motorization Rate (per 1000 population) of Malaysian Auto Industry Market.
- (ii) To Analyze the Demand structure of Car Buyers in Malaysian Auto Industry Market.

1.3. Scope of the Study

The study covers the Malaysian country to the extent of automotive industries, with special emphasis on knowledge of automotive of only Malaysian country.

1.4. Limitations of the Study

The study of challenges and opportunities ahead towards Malaysian automotive industry is prepared based on secondary data and the secondary data was limited to the extent of the Malaysian automotive industry only.

2.0. Previous Studies

2.1. Abdullah et al. (2008)¹, suggested that actual two way statement, extended period association and obligation, as well as constant association can help PROTON accomplish their program on seller expansion.

2.2. According to Rahman et al., (2009);Zainetal.,2008;RohaniandTeng, (2001)², For Malaysian automotive production itself, further most of automotive seller shave virtuous information and knowledge to recognize the seven elementary youth fits (histogram, Pare to chart, cause and outcome diagram, check sheet, scatter diagram, flowchart, and control chart). The execution of SPC is measured as significant in constant procedure enhancement.

2.3. Zuetal., (2008)³, In recent times, corporations are in requirement to faceplate record comprising of present superiority presentation, consumer requirement and anticipation, and also safe presentation to accomplish effectiveness and consumer agreement

2.4. According to Newspaper report of New Straits Times (2011)⁴, Malaysia has changed itself since the 1970s from a producer of raw materials into a developing multi- sector budgeted courage don by high know-how, knowledge-based and capital- intensive industries. Malaysia's Economic Performance ranking imp r o v e d to 7th placeoutof59 economies this year compared with12th position in2007.

2.5. According to Newspaper report of New Straits Times (2011)⁵, The World Effectiveness Yearbook 2011Report released by the Institute for Management Development (IMD) constant to rank Malaysia as amongst the top 5 most competitive countries in the Asia-Pacific region, taking 6th situation in the 20 million population group and 2nd position after Taiwan in the GDP per capita less thanUS\$20,000category. Furthermore, the country is the 21th principal exporter among all transaction countries universal.

2.6. According to Performance Management & Delivery Unit⁶, Deliberately situated in the heart of South-East Asia, Malaysia offers a cost- competitive situation for financier sailing to set up off shore processes in order to production progressive technical products for both provincial and global markets. In addition, Malaysia has a market-oriented economy which is maintained by pro-business government strategies. Last year, the Malaysian Government launched the Economic Transformation Programmed (ETP) which is accomplished by PEMANDU (Performance Management & Delivery Unit) under the support of the Prime Minister.

2.7. On the basis of Malaysian Budget (2012)⁷, to accomplish the targets set, Malaysia requirements an annual growth of GNIof6%. ThereareplanstorejuvenateMalaysia'sprivatesector, to grow the service sector from 58to65% and tocreate3.3 million new jobs. The Government will also introduce other renovation strategies in2012.

2.8. According to Malaysian Automotive Component Parts Manufacturer (2009)⁸,In 2006 the government introduced the National Automotive Policy (NAP) that envisages the advanced liberalization of the car marketplace through planned tie-ups and associations in order to eradicate rivalry.

2.9. According to Malaysian Automotive Institute (2011)⁹, indicated that, with the original of the marketplace due to the ASEAN Free Trade Agreement (AFTA)the domestic cars national market place segment has released to less than 60%. In ASEAN Malaysia is the third principal car market with 3 car producers, 8 car assemblers, 9 motor assemblers and more than 800 component producers and occupations more than 300,000people.

2.10. According to Malaysian Automotive Association (2010)¹⁰, depicted that, t o protect the local automotive industry, a number of import limitations were executed on overseas vehicles. With more than half million sales per year, Malaysia is the principal market for autos in South-East Asia.

For long time Malaysia's government has protected its auto industry from foreign competition by introducing an Asian material content policy, which include disposing high tariffs as well as non-tariff obstacles. "National autos", those manufactured by Malaysian producers such as Proton and Proud a, advantage from privileged conduct associated to" non- national" autos. The latter group comprise seven those automobiles that are manufactured in Malaysia by foreign-owned companies. High excise duties, import duties of about 30% (non-ASEAN) and so called Approved Permits (APs) also belong to these control.

2.11. Rahmanetal., 2009; Zainetal., 2008; Rohani and Teng, (2001)¹¹, stated that , For Malaysian automotive industry itself, most of automotive suppliers have good knowledge and experience to comprehend the seven basic tools (histogram, Pare to chart, cause and effect diagram, check sheet, scatter diagram, flowchart, and control chart).

The implementation of SPC is measured as significant in constant procedure development.

2.12. Basu, (2009)¹², said that, Quality information and analysis. The application of SPC delivers evidence that aids to control organization by process and decision making through the use of statistical tools and techniques.

2.13. The Malaysian Automotive Association (MAA) (2011)¹³, enumerated from a marginal reduction of 7.5% in sales of vehicles in 2011 to 599,887 units from 605,156 units in the preceding year. Passenger vehicles accounted for 535,112 units whereas the enduring units were market able vehicles. After strong start in 2011, the sales were affected due to the disturbance of the supply chain from Norma tragedies in Japan and Thailand. In 2012 vehicle sales are anticipated to increase slightly to 615,000 units.

2.14. According to Volkswagen Malaysian (2011)¹⁴, revealed that, after signing an contract for indigenous vehicle assembly in December 2010, Volkswagen will be of faring CKD and CBU models through its national partner DRB-Hi com. The manufacture roll-out at DRB-Hi com Automotive Complex started in November 2011, car sere deliberate to be obtained able in 2012. In association with DRB-Hi com Volkswagen is intended to a 10-fold production in its share of the Malaysian passenger car market which presently just i n c l u d e s 1%. Therefore Volkswagen is continuously familiarizing new models to the Malaysian marketplace.

2.15. According to Malaysian Automotive Component Parts Manufacturer (2009)¹⁵ stated that, Over the years the administration has dismantled its defensive strategies. Import obligations on CKD (completely knocked down units) and CBU (completely built-up units) from ASEAN members have been concentrated to 0% and 5%. Duties from non-ASEAN countries for CKD have been concentrated to 0%-10%, while duties on CBU have currently extended a 30%. Excise duties are enforce don all vehicles, regardless of their foundation.

3. Research Methodology

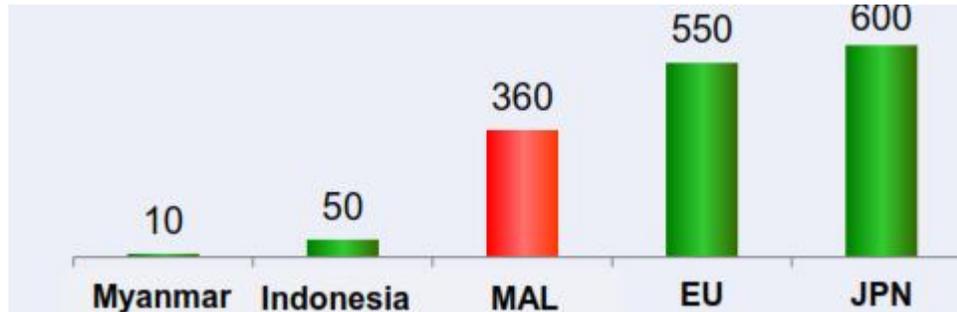
Sources of Data: The strength of any research reliant on the organized method of information's assortment sources and its analysis. The study is equipped grounded on primary information and secondary information. The primary facts have collected through oral interview from stalwarts of automotive industry.

The secondary information has composed from the reports of international conferences of automotive industry and all existing literature has obtained from internet automotive websites, auto business magazines, and e-auto journals.

Exploration of Data: In exploration of data, to display the occurrence or nonappearance of precise features and to associate and compare facts standards or features midst connected matters with numerous joint features or variables, figures have been equipped and figures are influential communiqué tools—it provides text the concentration of readers, and professionally existent great volumes of composite evidence.

4. Results and Discussion

Figure.1. Motorization Rate (per 1000 population) of Malaysian Auto Industry Market

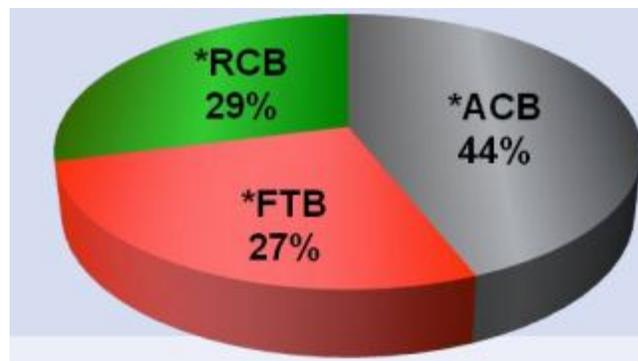


Source: ASEAN Automotive Conference report 2013

Above figure.1. Shows about the motorization rate per 1000 population of Malaysian auto industry market. Out of total of five countries of motorization rate, Japan auto industry market stood first, followed by second place European country, third place Malaysia, fourth and fifth places are Indonesia and Myanmar respectively.

Therefore, it can be concluded that, Malaysia is remains to present unique of the foremost manufacturers and exporters of means of transportation fragments, auto machineries and equipment in the ASEAN region.

Figure.2. Demand structure of Car Buyers in Malaysian Auto Industry Market



Source: ASEAN Automotive Conference report 2013

Above figure.2. depicts about the demand structure of First time, Additional and Replacement car buyers in Malaysian Auto industry Market. Out of total percentage of car buyers, 44 percent are the additional car buyers, followed by 29 percent and 27 percent are replacement car buyers and first time car buyers respectively.

Therefore, it can be concluded that, percentage of additional car customers are more due to customer’s diverse family status, income, taste and preferences, and standard of living.

Suggestions: The following are the suggestions for the challenges and opportunities for Malaysian auto industry market.

1. Finding out the research reveals that, Malaysia is the foremost manufacturers and exporters of means of transportation fragments, auto machineries and equipment in the ASEAN region, in such a case challenges and opportunities for Malaysian auto industry market is meeting international competence and efficacy, Corporations with original know-how are extremely required next Link with exploration supremacy, augment green dynamism investigation, intensification gas competence, collect sustenance from sellers in know-how enhancement, collect interior facility, upsurge marketable combined advent, extension of dominance skilful and accomplished effort strength and encourage expansion of essential auto manufacture know-hows. Haste up auto Research and Development to protect the auto production, as the innovative auto know-how is the significant to protect the auto production.

2. Ultimately, research findings also divulges that, in Malaysia the percentage of additional car buyers are high, in such a situation Malaysian auto should have Co-operation with indigenous sellers to stream in the ASEAN and world-wide market places. Furthermost significantly, the existence or progress of auto supply chain depends on the maintenance of the public.

5. Conclusion

In excess of the years the Malaysian automotive production has progressed from an association business in the direction of an industrial production concentrating on commuter car industrial although Producing floating occupation and regular earning amongst its workers. Nevertheless, the domestic automotive program has been mounted miserable, with Proton existence the merely OEM organized by Malaysian principal and no extended the market place front-runner. Japanese car manufacturers are once more controlling the auto marketplace and production. Furthermore, the production quiet insufficiencies the viable gain to disseminate into global market places due to its nonexistence of industrial development, specifically amongst fragments and part providers and short stages of assistances amongst personnel. Notwithstanding the determinations of Proton in emerging indigenous providers, extraordinary requirement on national market place and know-how arrangements has limited the enactment of these dealers on a provincial and worldwide measure. Even though the influence of the present world-wide predicament is adequate since Malaysia's automotive production is not knowingly disseminate focused on, this is merely provisional assistance since producing abilities are dwindling throughout the disaster, internal mandate is deteriorating, and the monotonous presentation of the automotive industry is remaining. The incitement correspondences by the administration and overview of innovative representations have to approximately amount exaggerated the development of the production in a constructive method, but the inducement set objectives the domestic automotive segment merely, and this perception of non-national auto producers goes them missing from advancing in Malaysia. Not only is a worldwide automotive association appropriate for the separate Malaysian auto manufacturer, Proton, to decrease surplus volume complete, e.g., agreement industrialized, but a domestic output alliance is a deliberate requirement, too, in imperative to generate high-performance effort structures and commercial representations. This necessitates a manufacturing association's scheme that safeguards and promotes essential work force privileges, cooperative negotiating and other varieties of community interchanges in order to increase output and modernization by activating labors with applied acquaintance and factory knowledge approximately the formal of automotive manufacture.

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