# insight报告（7）

**标题：**

2024东南亚汽车市场市场现状、各国优惠政策及国内车企布局情况分析报告

Analysis Report on the 2024 Southeast Asian Automobile Market, Preferential Policies in Various Countries, and Layout of Chinese Car Companies

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**概要：**

东南亚汽车市场近年来保持稳定增长，年销量超过300万辆，印尼、泰国和马来西亚为主要消费国。市场格局中，日系车企凭借早期进入、本地化适配和政策参与，占据主导地位，但中国车企正加快布局，呈现强劲增长潜力。区域层面，自贸协定降低了贸易壁垒，新能源汽车产业受到政策大力扶持，多国推出购车补贴、减免税收和生产激励措施，推动新能源车渗透率逐步提升。

印尼偏好MPV，马来西亚自主品牌占主导，泰国新能源市场发展迅速，菲律宾与越南汽车普及率相对较低但增长潜力显著。比亚迪、长城、上汽、奇瑞等中国车企通过投资建厂和渠道扩张，逐步实现本土化生产和销售，具备在该区域快速提升市占率的可能性。

整体来看，东南亚汽车市场兼具消费潜力与政策机遇，为中国车企出海提供了重要战略窗口。

The Southeast Asian automobile market has maintained steady growth in recent years, with annual sales exceeding 3 million units, led by Indonesia, Thailand, and Malaysia. Japanese automakers dominate the market due to early entry, localized adaptation, and active policy participation, but Chinese brands are accelerating their presence and showing strong growth momentum. At the regional level, free trade agreements have reduced trade barriers, while governments are vigorously promoting new energy vehicle (NEV) development through subsidies, tax incentives, and production support, gradually driving higher adoption rates.

Market preferences vary: Indonesia favors MPVs, Malaysia is dominated by local brands, Thailand is experiencing rapid NEV expansion, and both the Philippines and Vietnam exhibit relatively low car ownership but high growth potential. Chinese automakers such as BYD, Great Wall, SAIC, and Chery are investing in local manufacturing and distribution, advancing localized operations, and are well-positioned to increase their market share.

Overall, Southeast Asia presents both consumer demand and policy opportunities, making it a strategic destination for Chinese automakers’ overseas expansion.