

Single Window – a comprehensive e-service for visas and work permits

Thailand's textile industry in transition

Thai Silk - Moving from local to global



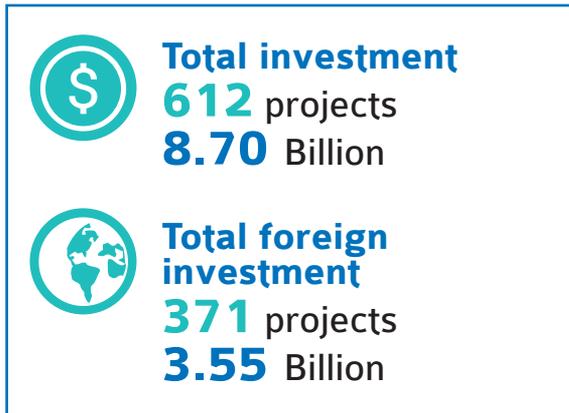
October 2017
vol. 27 no. 10



BOI NET APPLICATION

(January - June 2017)

Foreign investment by target sectors



Digital
54 Projects
9.54 M



Electrical & Electronics
32 Projects
662.47 M



Petrochemicals
23 Projects
762.53 M



Automotive
19 Projects
875.89 M



Agro Processing
16 Projects
187.96 M



Medical
7 Projects
62.31 M



Automation & Robotics
5 Projects
18.69 M



Aerospace
1 Project
1.82 M

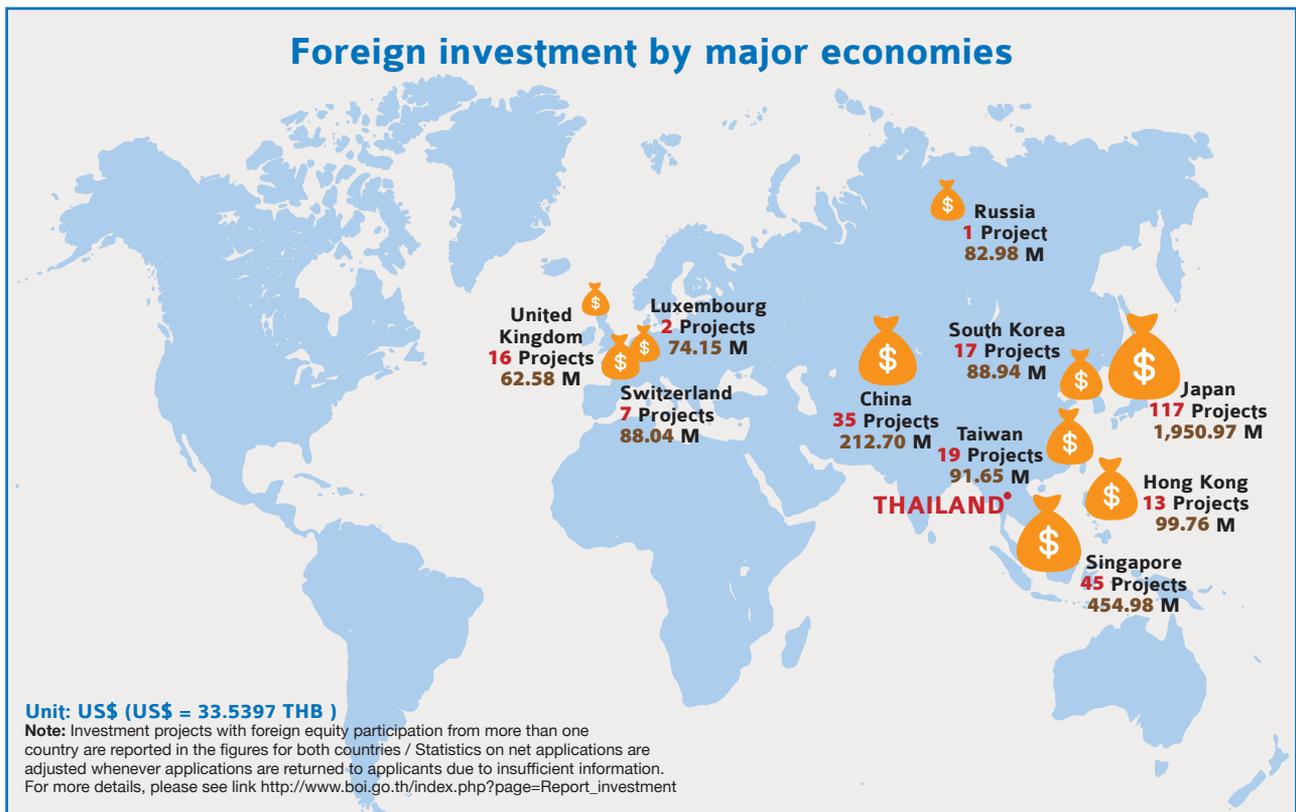


Tourism
8 Projects
372.45 M



Textile & Garment
2 Projects
17.29 M

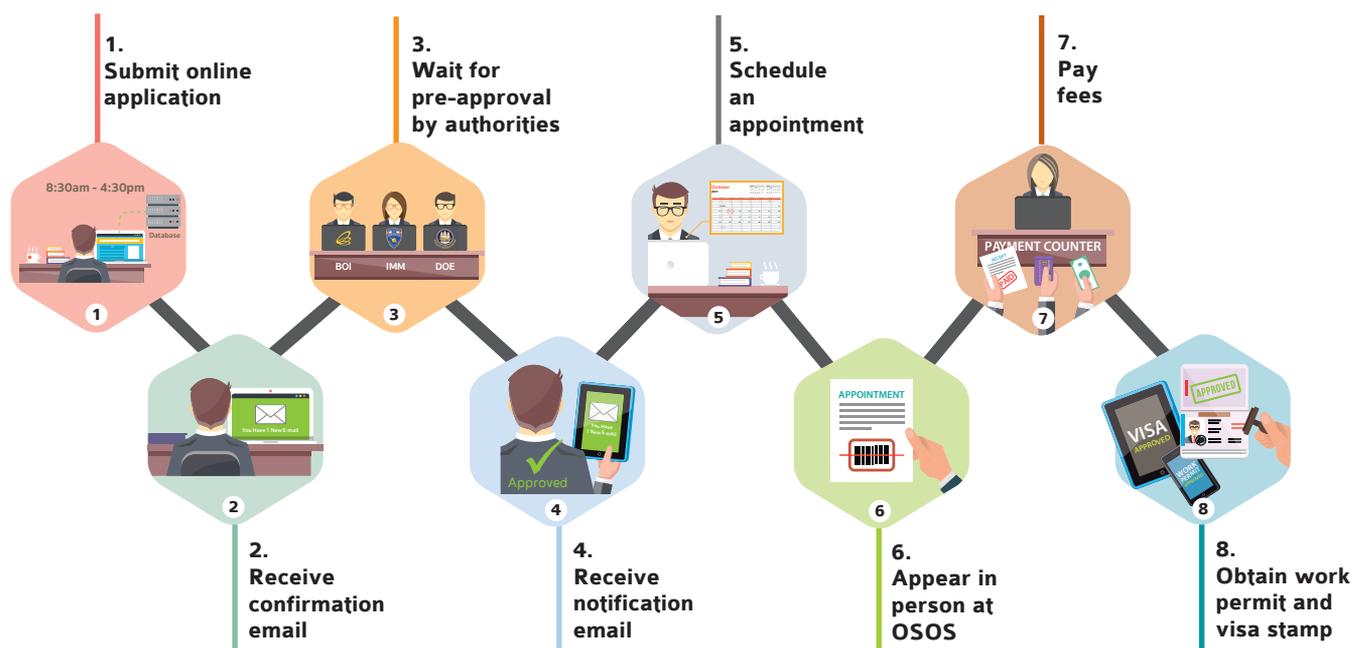
Foreign investment by major economies



TIR CONTENT October 2017

- 02 | **BOI Net Application**
- 03 | **Cover Story**
Single Window – a comprehensive e-service for visas and work permits
- 04 | **Industry Focus**
Thailand’s textile industry in transition
- 07 | **Short Article**
Thai Silk - Moving from local to global

- 08 | **Company Interview**
Hi-Tech Apparel - a world-class OEM sportswear manufacturer
- 09 | **News Bites**
- 10 | **Missions and Events**
- 11 | **Thailand Economy-At-A-Glance**
- 12 | **About BOI**



Single Window – a comprehensive e-service for visas and work permits

Given the rapidly growing numbers of users on digital platforms, the government has prioritized transforming and adapting Thailand to the fast-changing and dynamic environments of the technology sector. The Digital Industry is one of the ten key sectors for Thailand 4.0 making it a major priority.

The government is also looking at revamping the public sector to bring services in-line with the digital era. This year marks an important milestone for government e-service applications. For the first time ever, applications for visas and work permits will now be done on an integrated online system, which will reduce many redundancies and eliminate a tremendous amount of paperwork.

The new Single Window System for Visas and Work Permits, which took effect on October 1, 2017, will facilitate the entry of foreign experts for BOI promoted companies. The BOI, in collaboration with the Immigration Bureau and the Department of Employment, introduced this new e-service channel that can be used for applying for visas and work permits through a one-time online application, providing improved convenience and faster turnaround times.

By completing a request online, a foreign expert will receive a confirmation email of the submission. When the request is pre-approved by the relevant authorities, the foreign expert

will receive a notification email to schedule an appointment at a convenient date and time. The foreign expert applying for a visa and work permit will then need to appear in person at the One Start One Stop Investment Center (OSOS) for Visas and Work Permits at Chamchuri Square in Bangkok to obtain a digital work permit and visa stamp. All processes at the OSOS will be completed within three hours. The Immigration Office and Provincial Employment Office in Chiang Mai and Phuket will also be offering this new service.

The next step for the new Single Window system is to extend the service to both offices in every province across Thailand for BOI promoted companies by October next year. Furthermore, by the end of 2019, the service is expected to extend to all non-BOI promoted companies.

By effectively solving the problems and barriers faced by the business sector, the government will continue to work to enhance its trading facilities and the convenience of doing business in the country to further facilitate foreign investment. The single window system is one of several initiatives that are being rolled out to improve the supportive investment environment in Thailand and to enhance the country's long-term competitiveness. ■

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INDUSTRY FOCUS



Thai firms have great reputation for quality workmanship in producing protective clothing.

Thailand's textile industry in transition

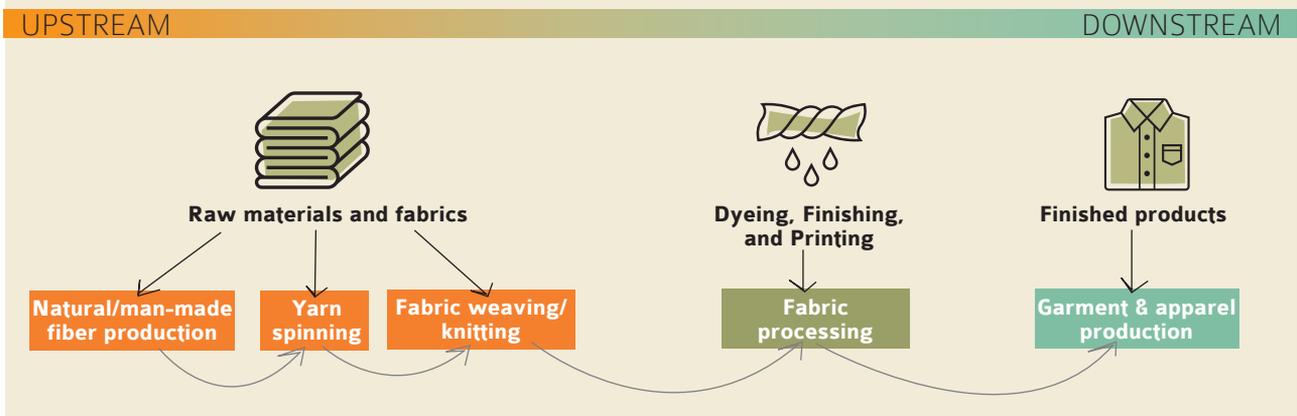
The retail value of domestic apparel market has seen a steady CAGR of 3.5% from 2011.

As the 11th largest exporter of apparel and clothing accessories in Asia, Thailand is one of the few countries that has a full range of activities across the entire value chain of the textile industry, from upstream to downstream, ranging from fiber production, yarn spinning, fabric weaving and processing, all the way to fashion design and garment production. With a long history in the textile industry over the past five decades, Thailand now has 4,700 textile and clothing manufacturers employing over 500,000 people with an export value of roughly THB 216 billion (USD 6.45 billion) in 2016, contributing approximately 3% to Thailand's total exports.

The retail value of domestic apparel market has seen a steady CAGR of 3.5% from 2011.

Originally known as a labor-intensive industry, Thailand's textile industry is undergoing a profound transition, shifting towards high-tech, value-added products. According to the Thailand Development Research Institute (TDRI), Japan, Korea, and Taiwan are excellent examples of places that integrated technology and newly adopted innovations into the supply chains of their respective textile industries. With the prioritized national agenda to fully upgrade Thailand's capabilities in the textile industry, and within the broader reforms being ushered

The complete supply chain in Thailand's textile industry



in through Thailand 4.0, the country is following in the footsteps of these developed states.

Synthetic fibers – diversified opportunities

In transitioning to higher value-added products, Thailand's textile industry has leveraged its considerable expertise in the petrochemical sector.

Home to high-quality downstream products in the petrochemical sector, Thailand has developed its capabilities in R&D as well as the production of oil-based synthetic fibers to feed into a wide range of main end use products including apparel, automotive, non-woven, and hygiene applications. Synthetic fibers range from polyester, nylon, rayon, and acrylic. Currently, Thailand is ranked as the ninth-largest polyester producer, with over 621,000 tons produced in 2016, and the fifth-largest acrylic producer in the world, producing about 114,000 tons in the same year. On the other hand, owing to cutting-edge technology and high capital investments required for the production of synthetics fibers, key players are the joint ventures and subsidiaries of multinational companies such as Indorama Polyester, Teijin Polyester, and Thai Toray.

Over the years, synthetic fibers, especially polyester, have increasingly grown in popularity worldwide. Accounting for over 60% of global fiber consumption, synthetic fibers are highly preferred due to their durability and exceptionally long-lasting properties compared to natural fibers. According to the Office of Industrial Economics (OIE), Thailand's man-made fibers production, including cellulose and synthetic fibers, and local consumption have year-on-year growth rates of 6.4% and a double-digit growth rate of 12.3%, respectively.

Functional textiles – an emerging market

The importance of Thailand's R&D of textile fibers, both natural and synthetic, is being emphasized to cater to more diverse end-use applications. This is making functional textiles an emerging market that is changing consumer behaviour.

According to the International Trade Administration, the global market value of functional textiles is expected to exceed THB 310 billion (USD 9.3 billion) by 2017. Given rising demand, a CAGR of 4% is expected throughout 2017. The Asia-Pacific region accounts for over 50% of the market, the largest worldwide. With Thailand ranked as



the 28th largest exporter of functional textiles, there are roughly 730 technical textiles producers ranging in 12 functional textiles categories including Medtex, Mobiltex, Agrotex, and Hometex. Medtex and Mobiltex are two categories that are achieving high growth. Producers in the functional textile categories include Asahi Kasei, Perma, Saha Seiren, PJ Garment, and TP Corp.

Due to its versatility, favorable growth in this sector is mainly driven by the increase in adoption by various end-users, which receive direct benefits in the robust growth in end-use industries. For example, the domestic market value for Medtex reached THB 20 billion (USD 0.6 billion) in 2016. Globally renowned as a

regional medical hub, Thailand's healthcare expenditure is accounting for 4.6% of the total GDP in 2015, the highest in the ASEAN.

Acknowledging the gap in opportunities in emerging markets, Thailand pursued groundbreaking technology through decades of intensive R&D. Recently, "smart fabrics" which contain six special characteristics, including UV protection, and anti-bacterial and flame retardant properties, were invented by Thai researchers. Another relevant example is Thai Num Choke Textile, an ecodesign and DMark-awarded weaving factory, which eagerly invested in the production of newly-invented car bumpers made from pineapple fiber.

THTI's long-term plan rolled out

Beyond textiles, Thailand is emerging as a fashion hub in Asia having hosted regional and international fashion shows including Bangkok International Couture Fashion Week, Elle Bangkok Fashion Week, and the Bangkok International Fashion Fair. These iconic events allow the country to simultaneously showcase its fashion industry and cultural heritage to the eyes of those who are fashion savvy in the region and beyond. Thailand is also a home to popular Thai designer brands, including Naraya, Sretsis, Dry Clean Only, and Disaya, which have successfully made their debuts on global fashion runways.

To reboot Thailand's textile industry in an increasingly competitive market as well as to

reinforce the ambitious goal of elevating Thailand as a global fashion leader, the Thailand Textile Institute (THTI) launched the long-term "Thailand Textile and Fashion Industries Development Strategy 2015 - 2030" plan.

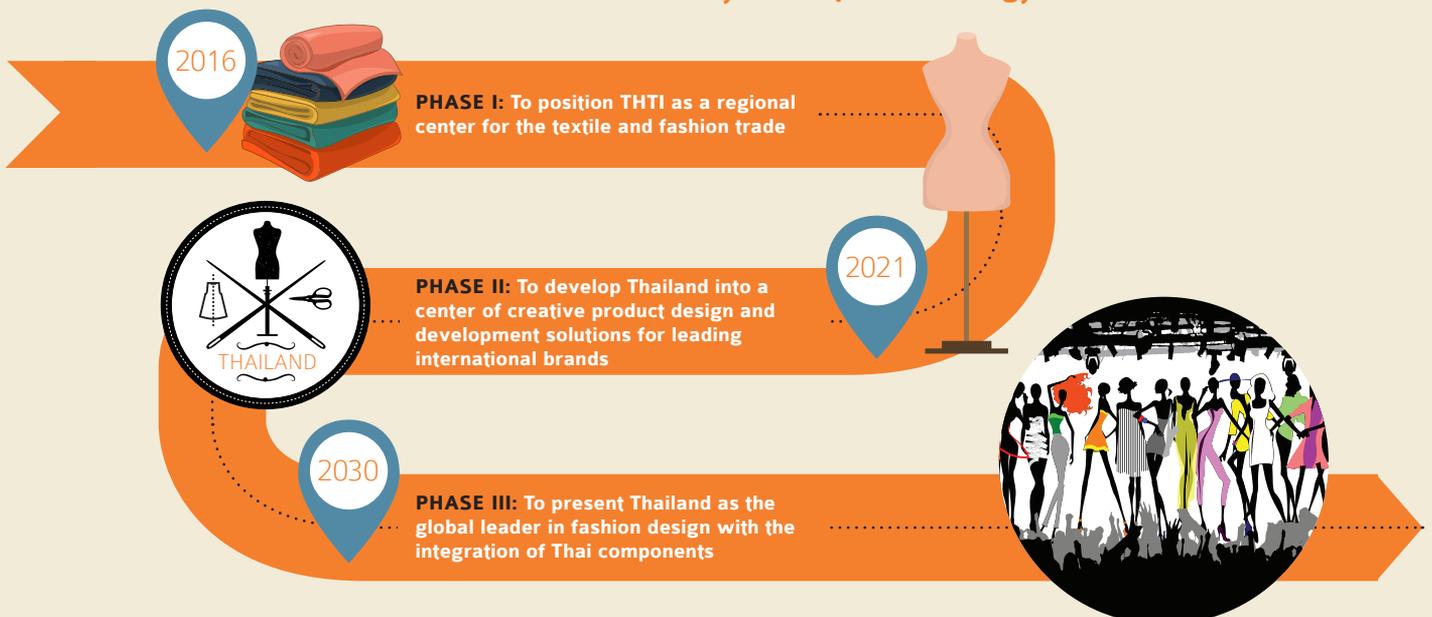
The plan consists of three phases and numerous measures have been adopted to support this long-term scheme. The measures include the establishment of an industrial fashion zone, fiber pilot plant, a yarns, fabric, and fashion product development center, in addition to a regional fashion academy.

The BOI's attractive investment packages

Apart from the THTI plan, the BOI is granting attractive investment packages for investors. First are tax incentives including a reduction in corporate income tax for 3-8 years together with an import duty exemption for machinery and raw or essential materials used in manufacturing export products. To underscore the importance of R&D, a 300% R&D expense can be deducted. Non-tax incentives include the permission to own land and facilitation of visas and work permits.

To this end, focused support from the government to elevate the country's textile industry to an advanced level with high-tech elements that build on smart materials but also fashion design, will lead to new opportunities in an increasingly important sector, for which Thailand will be on the cutting edge. ■

Thailand's textile and fashion industry development strategy 2015-2030



Thai Silk - Moving from local to global

Thai silk dates back over thousands of years when silkworm rearing and silk weaving spread throughout Asia. The industry rapidly developed following World War II. Ever since, Thailand has been recognized globally for its distinctive craftsmanship and the finest design of Thai silk from its exceptional expertise and know-how inherited across generations.

The Reputation and Allure of Thai Silk

As a home to a comprehensive supply chain in the textile industry together with abundant raw materials, Thailand was ranked the fourth largest silk producer in the world, according to the International Sericultural Commission. Additionally, in representing the true authenticity of Thai fabrics, there is no doubt that Thai silk has grown in popularity, with strong demand internationally. At a purchase value of THB 5,000 million (USD 149 million), Thai silk products ranked as the country's eighth most popular souvenir purchased by tourists and visitors in 2015, as reported by the Tourism Authority of Thailand.

In the past, Thai silk producers focused solely on sericulture and the traditional hand-woven process which distinguishes silk across different regions, for instance, Lamphun's Brocade Thai Silk, Phu Thai's Praewa silk, Surin's Hole silk. However, due to the fast changing demands of customers, end products without innovation are no longer the prime answer.

Revolutionizing the Silk Industry

Knowing that traditional products will no longer be as competitive in the global arena, many producers have started to recognize market opportunities in Thai silk. High technology and sophisticated marketing tools have been utilized to promote higher value silk in Thailand.

Some outstanding examples of companies that have tapped into this exceptional market for higher value-added silk products are Jim Thompson and Pasaya.

Topped with impressive revenues of THB 2,400 million (USD 72 million) in 2016, Jim Thompson, a world-class luxury silk brand, has combined traditional techniques together with modern designs which have resulted in superior products which command premium prices.



Source: Proud Pastra

Pasaya also serves as a successful example. An award-winning textiles brand has incorporated state-of-the-art innovations into its design and manufacturing process. A well-recognized example of one of Pasaya's inventive products is anti-spill silk.

Government's Plan for Revitalizing Local Silk

With an aim to elevate Thai silk products to an international level, the Thai government is actively involved in supporting the industry.

Recently, a top-notch event, Proud Pastra, was hosted by the government with the purpose of showcasing the authentic beauty of Thai silk with the integration of modern product design, which generates more than THB 50 million (USD 1.5 million) in trade value. In addition, the Ministry of Commerce plans to establish a silk center in the northeastern city of Korat, and promote One Tambon One Product (OTOP) with geographical indication (GI) certification to create added value for Thai silk products.

The government will work to ensure that the Thai silk industry benefits the country as it continues to evolve while retaining the mark of true Thai craftsmanship, style and quality, on the road to Thailand's transformation into a knowledge-based and value-added economy. ■

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Hi-Tech Apparel - a world-class OEM sportswear manufacturer

“We develop relentlessly to find better ways to achieve rapid delivery and cost efficiency for global brands. Our people are the key to our success and we truly emphasize and support the growth and happiness of our staff.”

Mr. Wason Vitanakorn

Given the popularity of different types of sports around the world, the demand for sportswear is rising rapidly with the ever-changing consumer lifestyles. Hi-Tech Apparel is one of Thailand’s leading OEM manufacturers for global sportswear companies and operates at a highly competitive standard.

Since beginning operations in 1991, Hi-Tech Apparel has strived over the past 26 years to improve its expertise as a garment producer manufacturing boxing shorts and underwear, growing into an OEM manufacturer for global sportswear brands including Nike, Hanes, Jockey, Target, Perry Ellis and Calvin Klein.

Currently, Hi-Tech Apparel has operations in 11 different locations in four countries including Thailand, Cambodia, Vietnam and Laos. With their main operations in Thailand, Hi-Tech Apparel has eight factories in the country with one factory in each of the other countries. The company is currently hiring more than 8,500 employees in the region.

Hi-Tech Apparel has been growing at a strong pace, with revenues of over THB 4 billion (USD 120 million) in 2016. A total production of 50 million units can be categorized by 35 million units of sportswear and 15 million units of underwear. Mr. Wason Vitanakorn, Deputy Managing Director of Hi-Tech Apparel, said that the company has experienced a growth rate of 10-15% over these past years.

Continuous and never-ending advances

Rapid delivery and cost-efficiency are the key elements in order to meet the standards of global sportswear brands. Lean manufacturing is considered the key success factor for Hi-Tech Apparel. When its implementation was utilized on the production line in 2008 for the first time, efficiency increased significantly by 20-30%. From that day forward, Hi-Tech Apparel has never stopped developing and improving themselves in order to achieve higher productivity and quality. The company always strives to enhance its competitiveness.

Thailand as a main production base

Mr. Wason revealed three key reasons behind Thailand’s promising landscape for this segment of the garment industry, which are its high production efficiency, innovation on fibers, and a strong network of OEMs and suppliers.

Production efficiency was, and remains, a critical factor for Hi-Tech Apparel’s investment decisions in the country. Even though the country has experienced higher labor costs, Thailand can still offer high efficiency as well as superior product quality.

The innovation on fibers used as raw materials is a second critical factor the company. The innovation on polyester, microfibers and laser bonding are some of the potential examples for Thailand’s innovation on fiber, where 50% of the raw materials are locally sourced. Furthermore, as the world is shifting to environmentally friendly products, many global sportswear brand are using rPET, recycled PET fiber for producing their shirts where Thailand can offer a promising supply of raw materials.

Mr. Wason Vitanakorn, Deputy Managing Director of Hi-Tech Apparel



Finally, a strong network of OEMs and suppliers of global sportswear are based in Thailand. With a superior network, knowledge sharing is widely passed on within the group of manufacturers, ensuring a competitive position for the country in global markets.

Expanding through the ASEAN region

Hi-Tech Apparel continues to build on its success by strategically expanding its production to Cambodia, Vietnam and Laos. By leveraging transportation costs for fast delivery with smaller lot sizes, the company is expanding throughout the region in strategic partnerships with global brands to meet increasing demand in the sportswear market. By the end of this year, the second phase of their factories in Cambodia will be completed and are expected to start full operations. Furthermore, by next year, the company will also construct its third phase, targeting 40% of their operations in other countries. The company's investments are around USD 10 million for each phase with a total of 1,500 jobs that will be created for people in Cambodia.

Automation for productivity improvements

Given the company's goal to continuously improve productivity, semi-automated machines were introduced in some of the production lines as well as for raw materials preparation. As customer trends are rapidly changing every day, automation will play an important role in order to cope with further customization in fashionable items, Mr. Wason noted. Moreover, digitalization is also becoming a crucial part of today's production system. The company can keep tracking machine operations to follow up with productivity and predictive downtime maintenance, further increasing efficiencies through manufacturing-based big data.

The company's proven track record has demonstrated the strong potential for Thailand and countries across the region in this thriving high value-added industry. The company will continue to build out its regional operations in-line with each country's growth prospects, with a vision of becoming a world-class manufacturing base. ■

Hi-Tech Apparel will continue to build out its regional operations across the ASEAN region, with a vision of becoming a world-class manufacturing base.

News BITES

Lenzing set to invest in Thailand

Lenzing, a leading Austrian supplier of high-quality, botanic cellulose fibers, ranging from dissolving pulp to standard and specialty cellulose fibers, to the textile and nonwovens industry, has announced plans to invest in Thailand, for the production of lyocell fibers. Lenzing is establishing a subsidiary in Thailand at Industrial Park 304 located in Prachinburi. A decision on constructing the new production plant will be made in the first quarter of 2018 with completion scheduled for the end of 2020. Prachinburi was selected based on its excellent overall infrastructure, outstanding expansion opportunities, and the sustainable biogenic energy supply. Similar to their plant in the US, the planned production facility will be constructed on the basis of the latest state-of-the-art technology and feature a capacity of up to 100,000 tons annually. The site will strengthen the Lenzing Group's worldwide lyocell network and enable its global customers to source Tencel branded fibers from Europe, North America, and Asia.

FILAGEN first launched in Thailand

GEP Spinning, a proprietary distributor of functional collagen fiber, launched FILAGEN for the first time in Thailand. Certified as Excellence in Material Development from The Material Connexion in New York, FILAGEN is an innovative functional fiber that has marine collagen peptides incorporated into the body of viscose fiber providing special characteristics including skin moisturization, odor protection, UV protection, and cool temperatures. FILAGEN is produced from renewable natural resources like cellulose fibers from wood and marine collagen peptides from milkfish scales and is, therefore, biodegradable and sustainable. GEP Spinning and a team of experts from Taiwan worked closely in R&D of the biotechnology and nanotechnology used in the production of FILAGEN. Many leading textiles producers, including Pasaya, Wacoal, and GrandSport, plan to use FILAGEN for their new collections. Mr. Chun-Hsien Shen, the CEO of GEP Spinning, said the company aims to achieve THB 1 billion (USD 30 million) in sales revenue this year, an increase of 70% from last year, and expects to capture 10% market share in textiles and specialty fibers.

BOI'S MISSIONS AND EVENTS



From 30 September - 5 October 2017, Prime Minister Prayuth Chan-o-cha paid an official visit to the United States together with a Thai delegation including Deputy Prime Minister Dr. Somkid Jatusripitak, cabinet ministers, related government agencies and Thai businessmen. The Prime Minister held a bilateral meeting with President Trump, met leaders of the U.S. Congress, and joined a warm welcome reception and dinner hosted by the U.S. Chamber of Commerce and US-ASEAN Business Council.



On October 2, 2017, H.E. Dr. Atchaka Sibunruang (center), Minister of Science and Technology, accompanied by BOI Senior Executive Advisor, Dr. Bonggot Anuroj (fifth from left) to attend a meeting with pharmaceutical and food companies in Tokyo, Japan from 2 – 5 October, 2017. The mission included an investment seminar and meetings with companies in the medical, automation and software industries. Dr. Bonggot also gave a presentation on the “New Chapter of Thailand’s Investment Promotion” on October 3, 2017 which was hosted by Sumitomo Mitsui Banking Corporation (SMBC).



From October 15 – 18, 2017, Deputy Secretary General, Mr. Narit Therdsteeasukdi (center) led in an investment mission to South Korea. The mission included meetings with H.E. Mr. Sarun Charoensuwan (fourth from left), Ambassador of Thailand to the Republic of Korea, and a Team Thailand meeting with representatives from Gyeonggi Province to discuss cooperation in investment activities between the two countries. In addition, Mr. Narit met with leading Korean companies to provide information about Thailand’s current promotion policies and incentives.



The BOI Industrial Linkage Development Division together with the Thai Subcontracting Promotion Association led a delegation of Thai entrepreneurs to exhibit at the Scandinavian Technology & Industry Expo 2017 in Herning, Denmark from October 1-7, 2017, and held meetings with companies involved in communications and connectivity equipment.



From October 15-21, 2017, BOI Executive Director of the Investment Marketing Bureau, Ms. Sonklin Ploymee (fourth from right), together with Mr. Pariyes Piriymaskul (third from left), Director of the BOI’s Tokyo Office, led a delegation to Okayama City and Hamamatsu City in Japan. Ms. Sonklin delivered an “Update on Thailand’s Latest Investment Promotion Policy” together with Dr. Veerapat Tantayakom (second from right), Executive Director of the Investment Project Division, Office of Eastern Economic Corridor on “EEC Development” and Mr. Junichiro Haseba, Director of Investment Cooperation Dept., JETRO Bangkok (third from right) as well as an “Economic Overview and How to Do Business in Thailand.” The mission also included one-on-one meetings with Japanese companies in various industries.



The Director of the BOI’s Osaka Office, Ms. Patcharada Nawakawongkarn, together with a team from the BOI’s Industrial Linkage Development Division and Thai business delegates, led an investment mission to Osaka, Japan from October 1-7, 2017. The mission’s activities included business matching with Japanese companies and attending the M-Tech Kansai 2017 event.

THAILAND ECONOMY-AT-A-GLANCE

Demographics

US\$ = 33.5397 THB



Population
(2016)
68 M



ASEAN population
(2016)
633 M



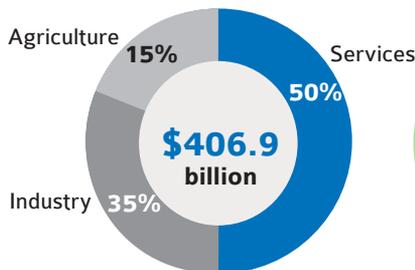
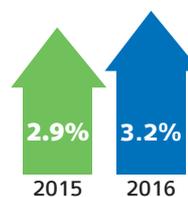
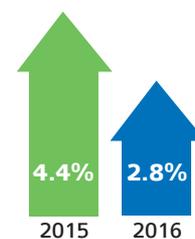
Literacy rate
(2015)
97%



Minimum wage
(2016)
300 Baht/day
8.94 US\$/day

Source: United Nations

Gross Domestic Product

GDP by sector
2016GDP per Capita
(2016)GDP growth
(% yoy)Total investment growth
(% yoy)

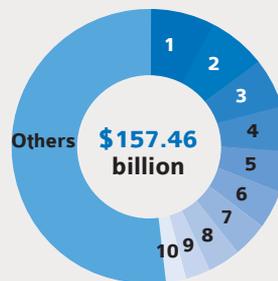
Source: NESDB

Export Figures

Thailand export value



Note: *2009-2016 CAGR



Top 10 exports (January - August 2017)

- 1 Motor cars and parts (11.1%)
 - 2 Computer and parts (7.6%)
 - 3 Precious stones and jewellery (5.5%)
 - 4 Rubber products (4.3%)
 - 5 Plastic beads (3.7%)
 - 6 Electronic integrated circuits (3.5%)
 - 7 Machinery and parts (3.2%)
 - 8 Chemical products (3.1%)
 - 9 Refine fuels (2.8%)
 - 10 Rubber (2.7%)
- Others (52.5%)

Source: Ministry of Commerce

Other Economic Indicators



\$157.46 billion
Total export
value (Aug 2017)



\$20.0 billion
Trade balance
(Aug 2017)



\$29.9 billion
Current account
balance (Aug 2017)



\$199.3 billion
International
reserves (Sep 2017)



62.5%
Capacity
utilization
(Aug 2017)



96.0
Manufacturing
production index
(Aug 2017)



100.60
Headline consumer
price index (2017F)
(The base year is 2015=100)



1.0
Headline
inflation (2017F)

Source: Bank of Thailand, Ministry of Commerce

Average Exchange Rates

As of 2 October 2017

33.54
THB39.65
THB45.08
THB29.95
THB5.07
THBSource: Bank of Thailand
Note: JPY currency is for 100 Yen

Tax Rates

Corporate income tax 10-20%

Withholding tax 1-10%

Value added tax 7%

Source: The Revenue Department

The Office of the Board of Investment (BOI) is the principle government agency that operates under the Prime Minister's Office for the purpose of encouraging investment in Thailand. We at the BOI serve as the professional contact points for investors, providing them with useful investment information and services. We offer business support and investment incentive to foreign investors in Thailand, including tax and non-tax incentives. A few non-tax incentives include granting land ownership to foreigners and facilitating visas and work permits. Besides serving the needs of overseas investors, we also offer consultation services to Thai investors who are interested in investment opportunities abroad.

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