

GREEN INDUSTRY

GLOBAL TRENDS TOWARD GREEN TRANSITION

Despite numerous challenges, climate change stands at the forefront of all issues. This has raised significant awareness in both the public and private sectors across the world, prompting efforts to tackle these challenges. As a result, the world is now moving toward a green economy, as evidenced by the significant increase in the global biotech market size and renewable energy.



GROWING MARKET FOR BIOTECHNOLOGY

As defined by the European Commission, global biotechnology involves utilizing renewable biological resources from both land and sea—such as crops, forests, fish, animals, and microorganisms—to create food, materials, and energy. Presently, the global biotech market has seen a substantial increase in size, rising from 1.38 million USD in 2023 to 4.25 million USD in 2033, equating to an 11.8% compound annual growth rate (CAGR). North America currently holds the largest market share in biotechnology, with the Asia-Pacific region emerging as the fastest-growing area in this sector.

The Global Green Technology and Sustainability Market Size¹



compound annual growth rate (CAGR) from 14 billion USD in 2022 to 61 billion USD 2030

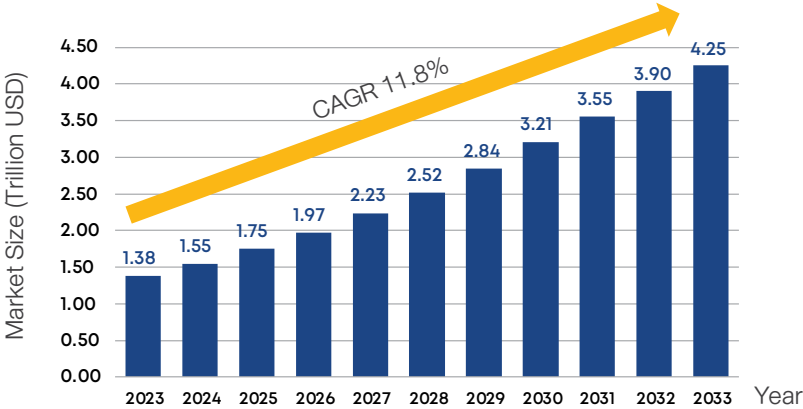
Renewable Energy Market Size²



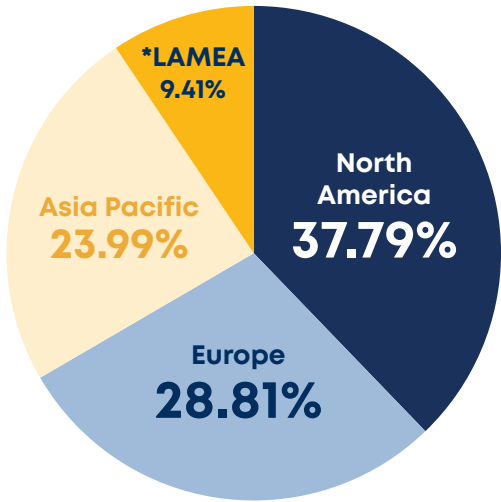
compound annual growth rate (CAGR) from 972 billion USD in 2022 to 2,026 billion USD in 2030

Source: ¹Precedence Research, ²Statista

Global Biotech Market Size



Market Share by Region



* Latin America, the Middle East and Africa

Source: Precedent Research

THAILAND'S STRATEGIC PATH TO ADVANCING THE BIO-BASED INDUSTRY

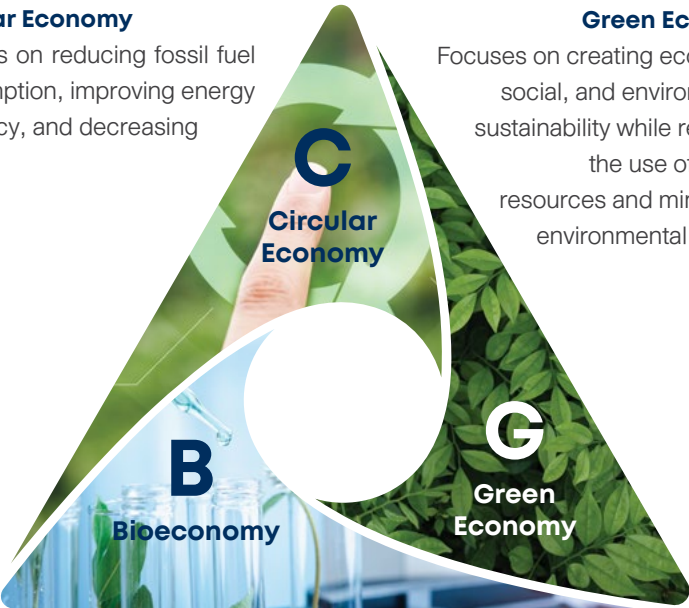
Thailand is committed to harnessing global trends toward a green transition and economic growth to foster inclusive and sustainable development. To support this vision, the Thai government has introduced the Bio-Circular-Green (BCG) development policy. This policy not only promotes the growth of the bio-industry (Bio), but also emphasizes the sustainable use of natural and biological resources (Green), while aiming to achieve climate goals by reducing emissions, waste, and excessive energy use (Circular). By integrating these three aspects, Thailand aims to build a bio-based industry that is both innovative and sustainable, ensuring long-term economic growth driven by value and innovation.

Circular Economy

Focuses on reducing fossil fuel consumption, improving energy efficiency, and decreasing waste.

Green Economy

Focuses on creating economic, social, and environmental sustainability while reducing the use of natural resources and minimizing environmental impact.



Bioeconomy

The largest component contributing to bio-based industry, which mainly focuses on agriculture, forestry, fisheries, and raw materials for bio-manufacturing products.

Source: Japan Research Institute

THE DEVELOPMENT OF BIO-BASED INDUSTRY IN THAILAND

The Thai government has been steadfast in its pursuit of the bioeconomy for many years, highlighted by milestones such as the founding of **the National Center for Genetic Engineering and Biotechnology (BIOTEC) in 1983**. Subsequently, national frameworks for bioplastics and biotechnology have been established to enhance Thailand's competitiveness and productivity in this industry. With continuous policy support, the bio-based industry is being secured as a top priority for the government over time.

2015

Thailand 4.0 and the new s-curve

The S-Curve policy will be a key driver of the Thai economy, focusing on the adoption of technology and innovation.

The "First S-Curve" includes Agriculture and Biotechnology and Food for the Future, while Biofuels and Biochemicals have been added to the "New S-Curve."

Source: Thaieei

2021

BCG Economy Development

The development of Bio-Circular-Green Economy aims at promoting inclusive and sustainable growth. It harnesses the nation's biological diversity and cultural wealth, leveraging technology and innovation. The model focuses on advancing the bioenergy, biomaterial, and biochemical sectors.

2024

Thailand Vision 2030

The government has set a goal for Thailand to become the global hub for agriculture and food, tourism, and wellness and medical services. Many measures have been launched to promote bio-based industries through both tax and non-tax incentives.

Timelines

THAILAND'S RICHNESS IN RESOURCES AND MATERIALS

Thailand is part of the Indo-Burma “biodiversity hotspot.” The country boasts numerous key resources utilized for bio-related activities. With over 15,000 plant species, Thailand is renowned as a major producer of cassava, sugarcane, palm oil, and rice. Thailand’s **top 10 global rankings** in these categories highlight its leading status as a world exporter.

Product	World Ranking in 2022	Output (Million Tons)	Value (Million Tons)
Cassava	3 rd	34	2,244
Palm Oil	3 rd	19	4,289
Sugarcane	4 th	92	2,716
Rice	6 th	34	10,267



Thailand's Current Status

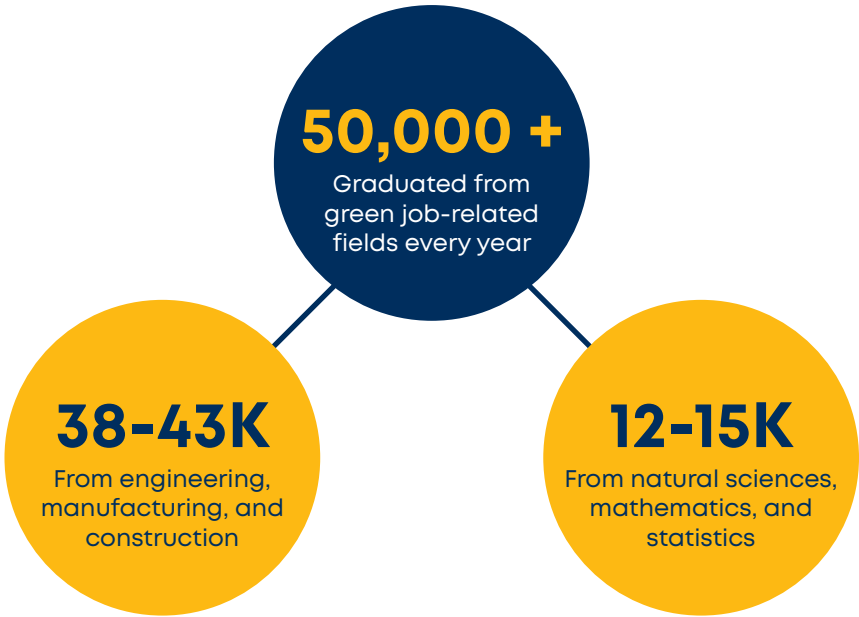
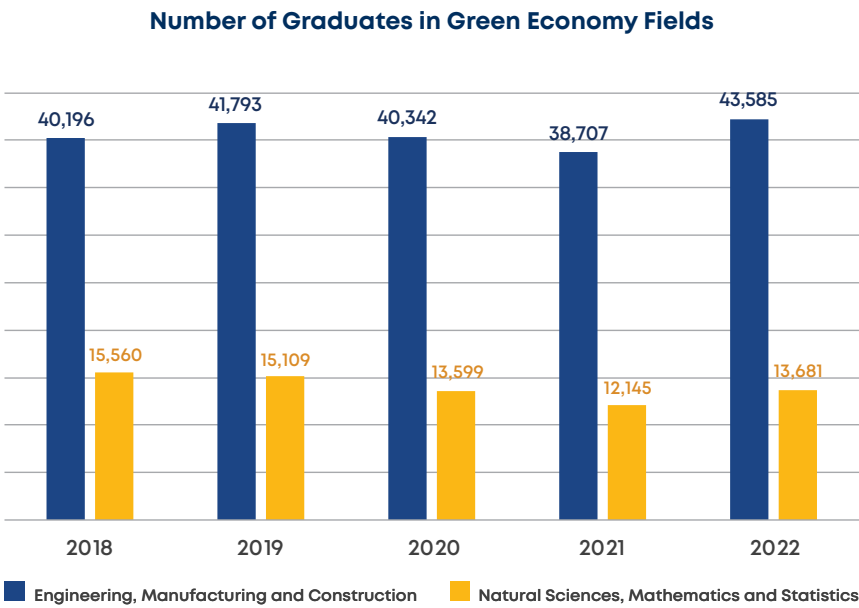
3rd in Southeast Asia for the diversity of the ecology⁴

Top 10 Most bio-diverse region in the world³

Source: ¹Biofin, ²The Food and Agriculture Organization (FAO), ³Thaiscibiodiversity, ⁴The National Science and Technology Development Agency (NSTDA)

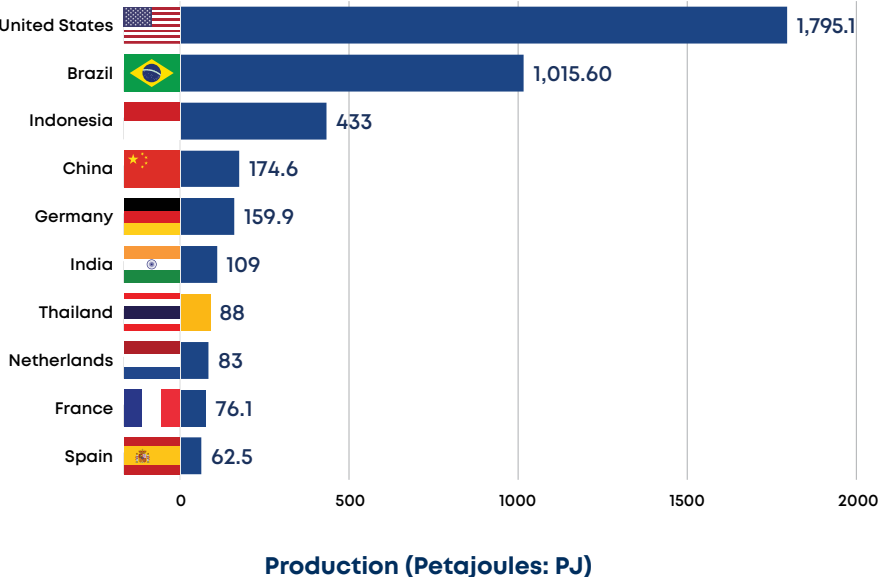
HOME OF HIGH-SKILLED WORKFORCES

Over the years, Thailand has effectively become a hub for providing labor to different industries in the international supply chain. The nation supplies a substantial amount of labor across various sectors, including the bio-based industry. Annually, nearly 50,000 graduates in the green economy field enter this industry to meet the increasing demand. Additionally, collaboration between the private and public sectors has led to improvements in the quality of labor through the joint development of curricula, skills, and knowledge.



Source: Ministry of Higher Education, Science, Research and Innovation

SECTOR OF OPPORTUNITIES: BIOFUEL



7th Largest biofuel producer in the world 2023

Thailand ranks 7th globally in biofuel production, totaling 88 petajoules in 2023. Ethanol significantly contributes to the industry’s expansion, which is anticipated to grow further with economic and tourism recovery. Additionally, the government has introduced initiatives to boost the ethanol sector, including establishing production goals for transportation ethanol and promoting the use of E20 gasohol.

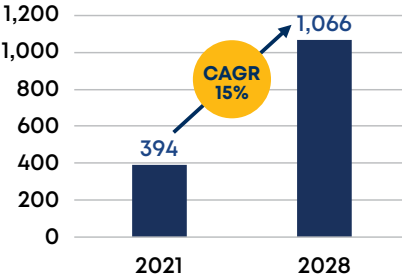


Source: Statista

SECTOR OF OPPORTUNITIES: BIOCHEMICAL

Thai biochemical products are poised to become a cornerstone of Thailand’s economy, leveraging and enhancing the value of local agricultural resources like sugarcane, cassava, and oil palm. Through various stages of production, there is potential to increase value significantly: 2–4 times in primary production, 6–15 times in intermediate production, and 18–188 times in advanced production. This growth trajectory is evidenced by the substantial rise projected in Thailand’s biochemical market value, expected to grow from 1,485 million USD in 2021 to 3,769 million USD by 2028, with a compound annual growth rate (CAGR) of 14% during this period, driven by the expansion of by-products from sugarcane, cassava, and palm oil.

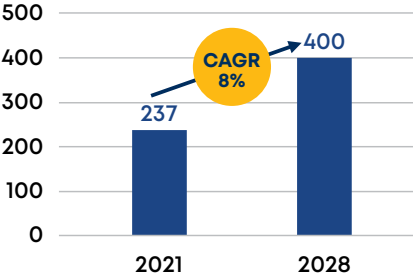
Sugarcane



Examples of Final Products

- Yeast Extract
- Furfuryl Alcohol
- Sweet Substitute

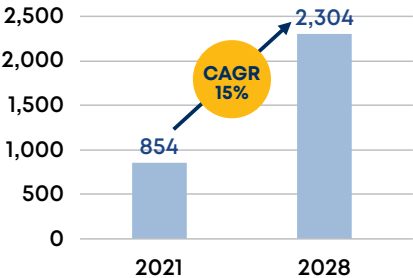
Cassava



Examples of Final Products

- Furfuryl Alcohol
- Sweet Substitute
- Beta Glucan
- Phytase enzyme
- Biodegradable Polymers

Palm Oil



Examples of Final Products

- Oleochemical

Source: Krungthai Compass

SECTOR OF OPPORTUNITIES: BIOPLASTIC

Thailand utilizes major economic crops such as cassava and sugarcane as primary resources for producing bioplastics, predominantly used in the packaging sector.

2nd
Largest Bioplastic Hub in the World¹

95,000
Tons of Production Capacity per Year¹



Thailand Board of Investment (BOI) has provided financial support for more than 24 bioplastic projects between 2018 and 2023, with a total investment exceeding 37 billion baht.



The Excise Department promoted the use of ethanol in the bioplastic industry by replacing petroleum-based raw materials with plant-derived ethanol, such as that derived from sugarcane and cassava.



Ministry of Industry and Ministry of Finance have initiated **Green Tax Expense program**, allowing business operators to deduct expenses from purchasing biodegradable plastic products from corporate income tax at 1.25 times the amount spent.








Source: ¹Royal Thai Government (data as of 2023), ²The National Science and Technology Development Agency (NSTDA), ³Ministry of Industry (MOI)



SECTOR OF OPPORTUNITIES: BIOPHARMACEUTICALS

Thailand is renowned for its high standards in the medical and biopharmaceutical sectors. The Thai biopharmaceutical industry is currently growing, driven by rising patient numbers, advancements in drug and vaccine manufacturing, and supportive government policies. These developments are part of the government’s strategic plan to establish a robust ecosystem in this field.

	Agency	Vaccine Type	Vaccine Name
	Siam Bioscience Co. Ltd	Viral Vector Vaccine	COVID-19 Vaccine AstraZeneca
	Government Pharmaceutical Organization (GPO)	Inactivated Vaccine	HXP-GPOVac
	Chula Vaccine Research Center (Chula VRC)	Chula Mrna Vaccine	Chula-Cov19
	Baiya Phytopharm Co., Ltd.	Subunit Vaccine	Baiya SARS-CoV-2 Vax1
	BioNet-Asia Co., Ltd.	Dna Vaccine	COVIGEN

Source: Krungsri Research

THAILAND'S MEGA PROJECTS FOR BIO-BASED INDUSTRY DEVELOPMENT

Under **Thailand's Bio-Industry Development Measures 2018–2027**, the Thai government aims to accelerate domestic investment to exceed 5,200 million USD. Currently, investments in the BOI Hubs amount to approximately 782 million USD. These projects include investments in ethanol plants, biomass power plants, biorefineries, biochemistry, and the production of PLA bioplastic from both multinational and local companies.



Nakhonsawan BioComplex (NBC): Builds a sugarcane mill, ethanol plant, and biomass power plant



Bioeconomy Industrial Estate Project: Expands existing ethanol production and explores biojet fuel



Bio Hub Asia: A smart eco-industrial area to support biomass, biorefinery and biochemistry

UBONRATCHATHANI DEVELOPMENT CO., LTD.

Ubon Ratchathani Industrial Estate Project: New industrial zone for agro-processing, biotechnology and organic biochemistry

CHAORAI SUGAR INDUSTRY CO., LTD.

Lopburi Bio Complex Project: Using advanced technology for agricultural processing and renewable energy



Polylactic Acid (PLA) Project: A facility to produce PLA bioplastic with a capacity of 75,000 tons per year

Source: Royal Thai Government

ESTABLISHMENT OF CENTERS OF EXCELLENCE IN BIOECONOMY (CoBE)

Thailand established **the Centers of Excellence in Bioeconomy (CoBE)**. This development aims to achieve excellence in research and development, human resource development, prototype development, and bio-industry intelligence. The initiative promotes a comprehensive network between public and private sectors, as well as academic and research institutions, to support businesses from multiple angles.

Research and Development

Connecting research institutions and industry through various agencies

(NSTDA, NESDC, NRCT, OCSB, and The Plastic Institute)



Prototype Development / Enterprise Upgrading

Supporting businesses to improve and develop bio-based products by providing consultation and financial support

(NRCT, TISTR, OCSB, DIP, OIE)



Human Resource Development

Developing curricular and training to create bio-based personnel and experts

(DIP, NESDC, and Chula)



Bio-Industry Intelligence Center

Creating a supportive environment by developing a bio-industry deep data center

(OIE and The Plastic Institute)



Source: Royal Thai Government

OTHER SUPPORTING INFRASTRUCTURES AND FACILITIES



Biorefinery Pilot Plant¹

A partnership between BBEPP and NSTDA involving two distinct pilot facilities dedicated to good manufacturing practice (GMP) and activities outside GMP regulations. The project is anticipated to be fully operational by 2024.



Thailand Bioresource Research Center (TBRC)²

A biomaterials service center offering resources such as microorganisms, plasmids, and monoclonal antibodies, along with related services for applied research across different industries.



Thailand Genome Sequencing Center³

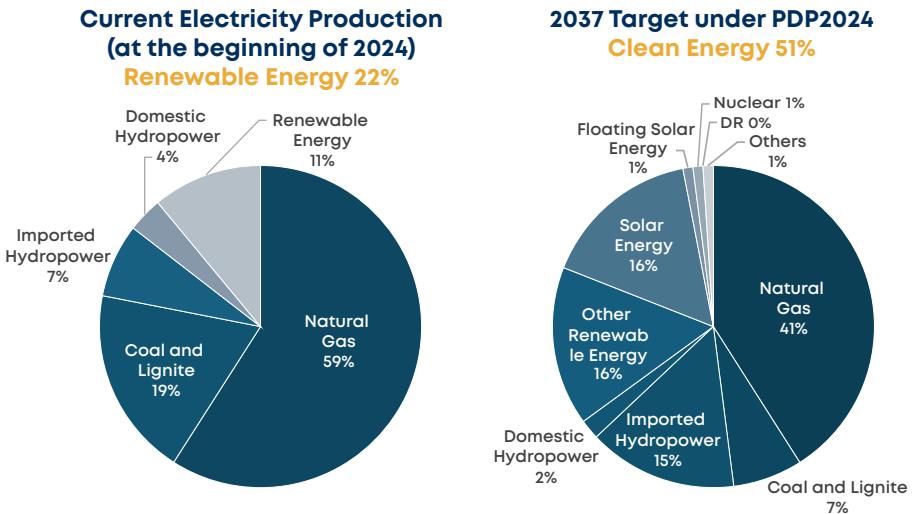
A collaborative network dedicated to human genome research is investigating genomic epidemiology to uncover genetic factors influencing disease susceptibility and traits in the Thai population. The goal of this initiative is to improve genomic-based testing and screening programs for clinical and public health applications in Thailand.



Source: ^{1,2}The National Science and Technology Development Agency (NSTDA), ³Biospectrum

THAILAND’S IS LEADING IN ENERGY TRANSITION

Thailand has set an ambitious goal of achieving carbon neutrality by 2050 and net-zero greenhouse gas emissions by 2065. To reach these targets, significant contributions from the energy sector are essential, particularly through substantial investments in renewable energy and energy efficiency. In September 2024, Thailand’s Ministry of Energy is poised to release **the Draft of National Energy Plan**. As part of this draft, the Power Development Plan (PDP) 2024 aims to increase the share of electricity production from clean sources to 51%¹. Complementing this, **the Alternative Energy Development Plan (AEDP) 2024** targets an increase in electricity production capacity to 73,286 megawatts²—up from 29,411 megawatts in AEDP 2018.



Target for Electricity Production from clean Energy under AEDP 2024

Types of Energy	AEDP Target
Solar Energy	38,974 MW
Floating Solar Energy	2,789 MW
Biomass	5,490 MW
Wind Power	9,379 MW
Biogas	1,682 MW
Community Waste	1,142 MW
Industrial Waste	249 MW
Small Hydropower	347 MW
Large Hydropower	2,918 MW
Geothermal	21 MW
Hydrogen	-
Imported Hydropower	10,295 MW
Total	73,286 MW

Source: ¹Committee on Energy, Thai Chamber of Commerce and ²Energy News Center

RANGE OF POLICIES AND MEASURED IMPLEMENTED FOR ENERGY TRANSITION

Policy in Supporting Clean Energy in Thailand

- **Feed-in-tariff (FIT)** scheme to encourage investment in renewable energy projects
- Development towards sustainability through **Environment Social Governance (ESG)**
- **UGT** to the industrial sector from **carbon tax wall** from export products such as **Carbon Border Adjustment Mechanism (CBAM)**
- **Direct PPA**: Enabling Businesses to Buy Electricity directly from Producers
- Regulatory Easing to Improve Access to Renewable Energy

Direct PPA

Direct PPA or Direct Power Purchase Agreements will allow energy trading from suppliers directly to buyers through Third Party Access (TPA)

2,000 Megawatts allowed to purchase under direct PPAs



Clean Energy Supplier



Direct PPA

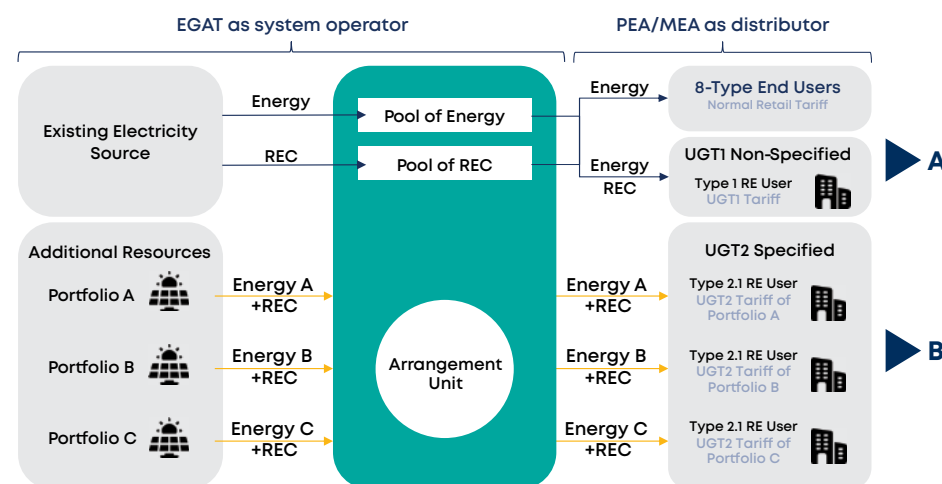


Clean Energy Buyer

Currently, **The Energy Regulatory Commission of Thailand (ERC)** is now studying the effects of the pilot project for Direct PPAs and design the service fees for TPA.

UTILITY GREEN TARIFF (UGT) TO ENSURE GREEN SUPPLY CHAIN

One of notable policy to support renewable energy transition in Thailand is **Utility Green Tariff (UGT) program**. The program aims to ensure that business owners have access to green electricity, accompanied by a **Renewable Energy Certificate (REC)**. Under this initiative, business will enter into power purchase agreements with electricity distributors and the program will enable them to procure services related to green energy, making the payments at a designated UGT rate.



A: Utility Green Tariff (1): UGT1

Non-specified green energy from existing RE portfolio

- All type of users can subscribe
- Start at 100 kWh per block
- Premium price top-up

B: Utility Green Tariff (2): UGT2

Specified green energy from additional RE portfolio

- For large consumption user
- Sleeved PPT (with utility)
- New tariff structure (not uniform)
- Demand-supply matching

Current Status

UGT 1

UGT 1 tariff rate has been opened for purchase with a premium rate of 0.0594 THB per unit above the normal electricity price.

UGT 2

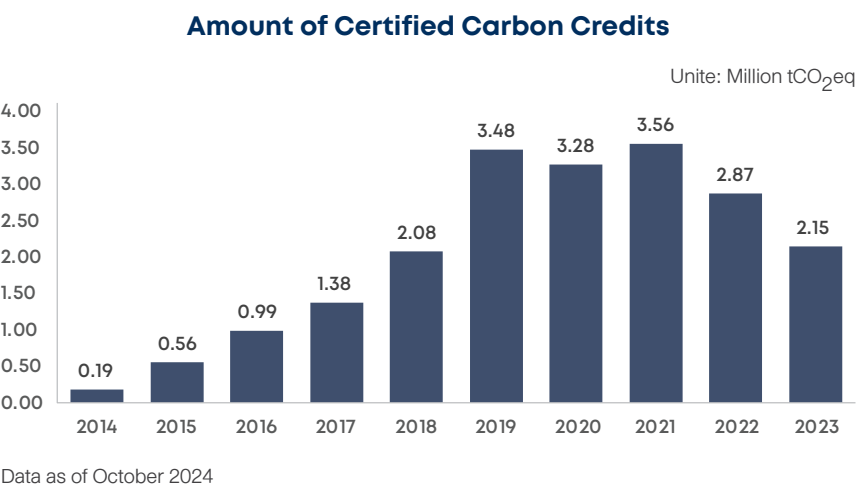
The price of electricity varies depending on the group of power plants

- Group A (start production in 2025): 4.5622 THB per unit
- Group B (start production in 2028): 4.5475 THB per unit

Source: Energy News Center

CARBON CREDIT MARKET TO BUILD SUSTAINABLE FUTURE

In addition to its commitment to reducing carbon emissions in the energy sector, Thailand is actively promoting participation across all sectors to more effectively achieve its climate targets through the establishment of a carbon credit market. **The Thailand Greenhouse Gas Management Organization (TGO)** has pioneered this initiative by implementing the **“Thailand Voluntary Emission Reduction Project” (T-VER)**. Under the T-VER program, buyers and sellers are required to register accounts with TGO, enabling them to negotiate directly over-the-counter under TGO’s supervision. Upon completion of a sale, TGO facilitates the transfer of carbon credits from the seller to the buyer. To date, there have been 433 projects registered under T-VER, with a total of 20,499,603 tCO₂eq in certified carbon credits. TGO continues to work diligently to align T-VER with international standards and integrate Thailand’s carbon market into the global framework.



Other Ongoing Projects Related to Carbon Credit Market



FTI Renewable Energy & Carbon Credit Platform:
The first carbon credit exchange platform developed in collaboration with TGO



Carbon Credit Center: The Stock Exchange of Thailand is currently studying the development of regulatory and trading systems for registered companies.

BOI’S INCENTIVES FOR GREEN INDUSTRY

Tax Incentives for Bio Economy		
Group	Eligible Projects	Incentives*
A1+	<ul style="list-style-type: none"> ● Biotechnology development 	10 Years (With no cap)
A1	<ul style="list-style-type: none"> ● Economic forest plantation and energy crops plantation ● Modern agriculture 	8 Years (With no cap)
A2	<ul style="list-style-type: none"> ● Manufacture of organic starch or organic flour ● Manufacture of future food ● Manufacture of animal feed or animal food ingredients food ingredients ● Grading and storage of agricultural products ● Manufacture of fuel or pharmaceutical grade alcohol from agricultural products, including agricultural scrap or waste ● Manufacture of natural extracts or products from natural extracts ● Manufacture of bioplastic or products from bioplastic ● Manufacture of biochemicals ● Production of electricity or electricity and steam from renewable energy such as solar energy, wind energy, biomass or biogas, etc. except from garbage or refuse derived fuel ● Manufacture of medical products ● Medical and health care services 	8 Years
A3	<ul style="list-style-type: none"> ● Animal propagation or animal husbandry ● Slaughtering ● Deep sea fishery ● Manufacture of modified starch or starch made from plants that have special properties ● Manufacture of oil or fat from plants or animals ● Manufacture or preservation of food, beverages, food additives, food ingredients or dietary supplement products using modern technology 	5 years

Tax Incentives for Bio Economy			Tax Incentives for Green Economy		
Group	Eligible Projects	Incentives*	Group	Eligible Projects	Incentives*
A3	<ul style="list-style-type: none"> ● Manufacture of products or packaging from agricultural products, by-products or agricultural waste or products from raw materials gained from by-products or agricultural waste ● Agri-food industrial zone or industrial estate ● Plant or animal breeding ● Plant Factory ● Manufacture of biological fertilizers, organic fertilizers, nano-coated organo chemical fertilizers and bio-pesticides ● Trading center for agricultural goods ● Digital trade center for agricultural products 	5 years	A1	<ul style="list-style-type: none"> ● Manufacture of Hydrogens, and its related products such as Green Ammonias from Water via Renewable Energy ● Energy Service Company (ESCO) ● Manufacture of battery 	8 Years (With no cap)
			A2	<ul style="list-style-type: none"> ● Production of electricity or electricity and steam from renewable energy such as solar energy, wind energy, biomass or biogas, etc. except from garbage or refuse derived fuel ● Production of electricity or electricity and steam from hydrogen ● Natural gas separation plants using carbon capture and storage (CCS) and/or carbon capture and utilization (CCU) technology ● Manufacture of petrochemical products using carbon capture and storage (CCS) and/or carbon capture and utilization (CCU) technology ● Manufacture of environmental - friendly pulp ● BEVs and BEV Platforms ● Waste treatment or disposal 	8 Years
A4	<ul style="list-style-type: none"> ● Manufacture of paper products coated with bio-plastics ● Manufacture of native starch or native flour ● Manufacture of sugar 	3 years			
B	<ul style="list-style-type: none"> ● Crop drying and silo facilities 	Non-tax			
Tax Incentives for Circular Economy					
Group	Eligible Projects	Incentives*	A3	<ul style="list-style-type: none"> ● Electrical vehicle charging station 	5 Years
A1	<ul style="list-style-type: none"> ● Production of electricity or electricity and steam from garbage or refuse derived fuel 	8 Years (With no cap)	A4	<ul style="list-style-type: none"> ● Cold storage, or cold storage and cold storage transportation using natural refrigerants ● Manufacture of products from environmental friendly pulp or paper ● Manufacture of electric battery motorcycles ● Manufacture of battery electric tricycles and battery electric tricycle platforms ● Manufacture of battery electric buses and trucks and battery electric buses and truck platforms 	3 Years
A2	<ul style="list-style-type: none"> ● Production of electricity or electricity and steam from renewable energy such as solar energy, wind energy, biomass or biogas, etc. except from garbage or refuse derived fuel ● Production of tap water, industrial water or steam From waste ● Recycling and reuse of unwanted materials ● Manufacture of Refuse Derived Fuel ● Manufacture of recycled plastic pellets including related products under the same project 	8 Years			
A3	<ul style="list-style-type: none"> ● Manufacture of recycled pulp 	5 Years			
A4	<ul style="list-style-type: none"> ● Sorting/Separation Service of Unwanted Materials ● Manufacture of products from recycled pulp or paper ● Manufacture of recycled fiber 	3 Years	B	<ul style="list-style-type: none"> ● Manufacture of cements 	Non-tax

Exemption of Import Duties



Exemption of import duties on machinery



Exemption of import duties on raw materials used in R&D



Exemption of import duties on raw materials used in production for export

Non-tax Incentives



Permit to own land



Permit to bring to bring in expatriates



Permit to take out or remit money abroad in foreign currency

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