

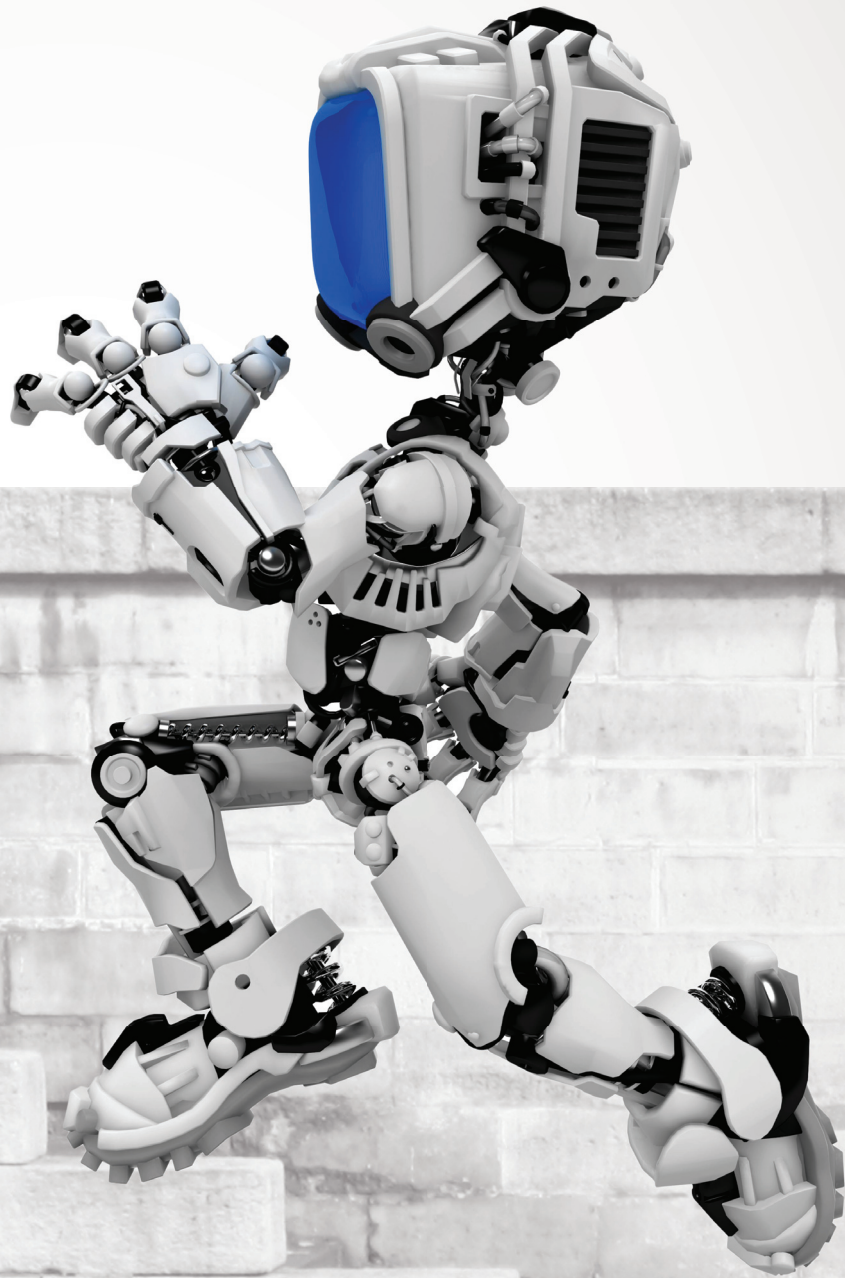
THAILAND, A GROWING MARKET FOR
AUTOMATION AND ROBOTICS

CT ASIA ROBOTICS LEADS THE WAY IN
THAILAND'S ROBOTICS REVOLUTION

THAILAND ARBITRATION CENTER OFFERS
BUSINESS CARE SUPPORT TO INVESTORS



April 2016 vol. 26 no. 4



SUBCON THAILAND CONTINUES TO LINK REGIONAL MANUFACTURING TO GLOBAL INDUSTRIES

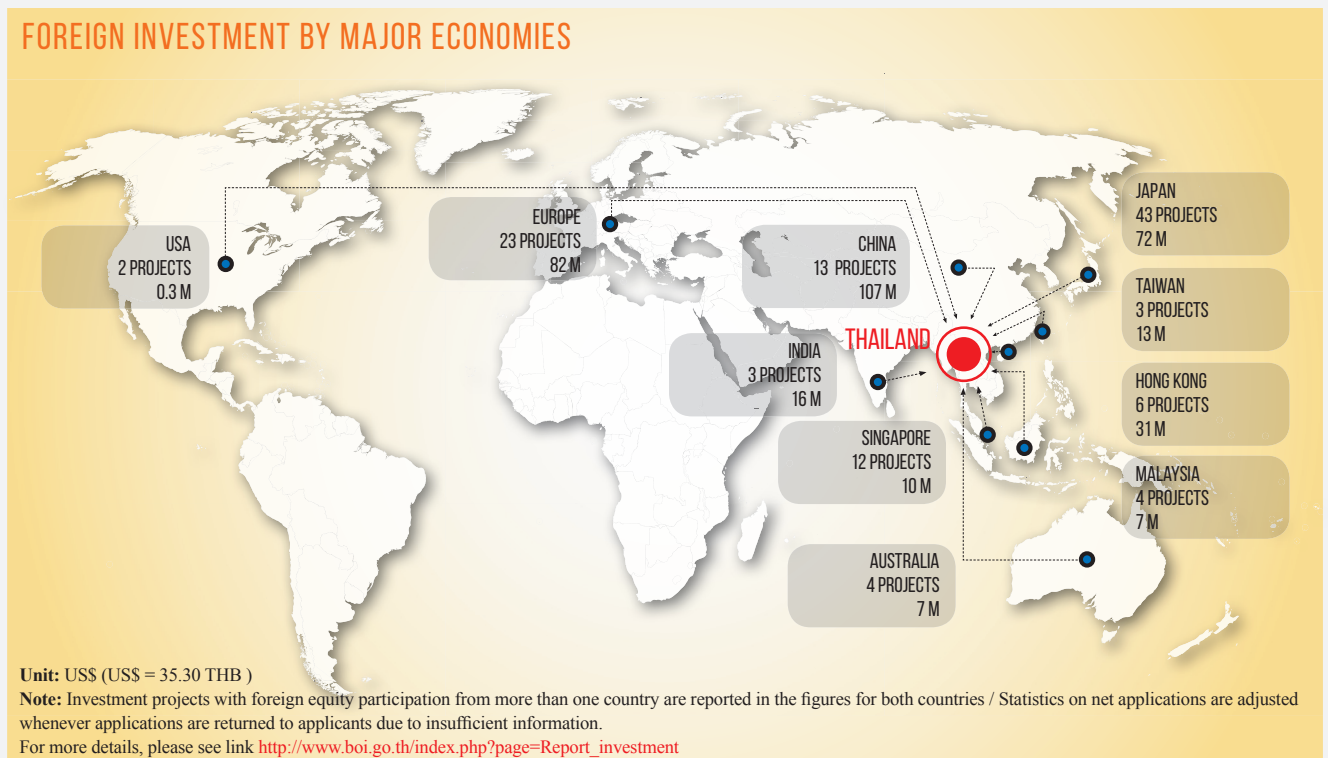
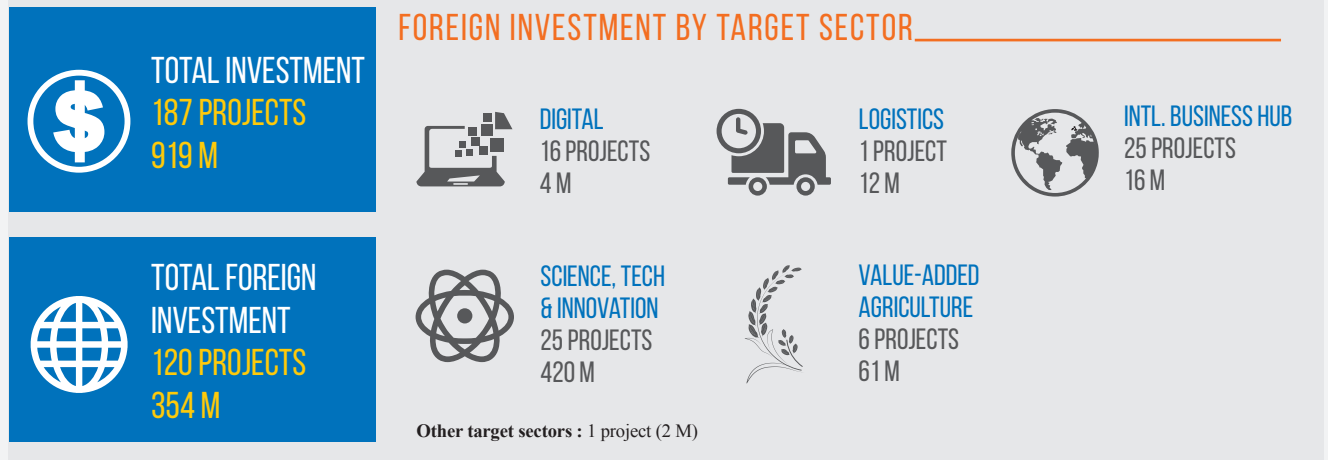
SUBCON THAILAND 2016 FAMED FOR BEING ASIA'S LARGEST INTERNATIONAL INDUSTRIAL SUBCONTRACTING
AND BUSINESS MATCHING EVENT THAT FOCUSES ON INDUSTRIAL LINKAGE DEVELOPMENT



THAILAND BOARD OF INVESTMENT
WWW.BOI.GO.TH

BOI NET APPLICATION

(JAN-FEB 2016)



page

TIR

CONTENT

APRIL 2016

BOI Net Application

02

Cover Story :

SUBCON Thailand Continues To Link Regional Manufacturing To Global Industries 03-04

Industry Focus :

Thailand, a Growing Market for Automation and Robotics 05-06

News Bites

06

Company Interview :

CT Asia Robotics Leads the Way In Thailand's Robotics Revolution 07-08

Short Article :

Thailand Arbitration Center Offers Business Care Support To Investors 09

BOI's Missions and Events

10

Thailand Economy-At-A-Glance

11

About BOI

12

COVER STORY

SUBCON THAILAND CONTINUES TO LINK REGIONAL MANUFACTURING TO GLOBAL INDUSTRIES

SUBCON THAILAND 2016

ASEAN'S LARGEST INTERNATIONAL INDUSTRIAL SUBCONTRACTING EVENT



The Thailand Board of Investment (BOI), the BOI Unit for Industrial Linkage Development (BUILD) and UBM Asia (Thailand) are proud to present SUBCON Thailand 2016. Famed for being ASEAN's Largest International Industrial Subcontracting and Business Matching Event that focuses on industrial linkage development, the 10th exciting edition represents an ideal opportunity for entrepreneurs to find new businesses as well as establish long-term, global partnerships.

With the ASEAN Economic Community (AEC) now a reality, SUBCON Thailand 2016 offers excellent opportunities for business expansion, with the support and benefit of government investment policies. Featuring more than 350 industrial subcontractors, the event

provides buyers and manufacturers from 18 countries, with opportunities to view and source a wide range of locally manufactured parts and components. Industrial-part makers in multiple industries will have unique opportunities to establish partnerships with large Tier 1 and Tier 2 corporations.

SUBCON Thailand has a track record of around THB 45 billion (USD 1.3 billion) of business transactions conducted over a 9 year period with over 25,000 business matches

Attended by an average of 25,000 industrial part-buyers from around the world annually, the exhibitors include both domestic and international manufacturers and suppliers of industrial parts in the aerospace, metal, medical, machinery, plastic, rubber, construction, electrical appliances and electronics industries, and other related supporting industries such as logistics and service providers. Around 21,490 international buyers and visitors participated in the 2015

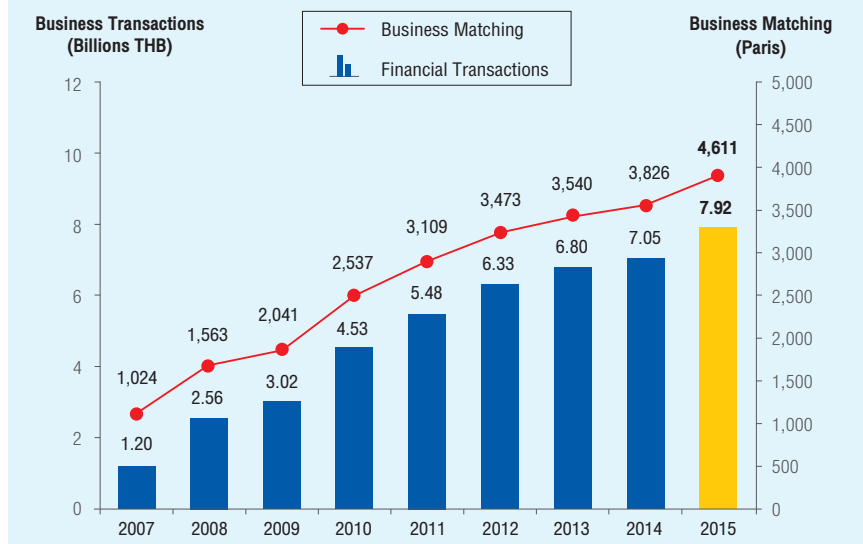
show which had a transaction value of THB 7.92 billion (USD 224 million), with more expected in follow-up deals. Representatives from 375 companies were present and about 4,611 business matches were made.

This premier event not only helps businesses to expand and grow, but it also showcases Thailand's industrial sub-contracting potential and promotes the country as an ASEAN investment hub. It also publicizes the government's support in the form of policies and incentives, helping to increase investor's confidence in the Thai industries.

KEY UNIQUE BUSINESS ADVANTAGES

SUBCON Thailand offers a number of unique business advantages over similar events. Firstly it facilitates business negotiations and business matching allowing the

Business Matchmaking & Business Transactions: 2007-2015



respective parties to build mutually beneficially relationships. Secondly it provides manufacturers the best possible opportunity to showcase their products and services. Thirdly it acts as an excellent business platform for new industries such as medical devices, aerospace etc. introducing part-makers to these future industries in the form of seminars.

Secondly it provides manufacturers the best possible opportunity to showcase their products and services. Thirdly it acts as an excellent business platform for new industries such as medical devices, aerospace etc. introducing part-makers

SUBCON Thailand 2016 will also feature seminars on key future industries such as the **Aerospace and Medical Device industries**

The special '**Business Matchmaking Program**' connects top industrial part buyers with Thai subcontractors to source parts, establish business collaborations and identify new marketing channels. Registered part-

buyers can set up appointments in advance with suppliers who fulfill their requirements, through an online program, saving everyone valuable time. Top global manufacturers, such as Suzuki, Mitsubishi Electric, Samsung Electronics, Honda Trading, Mercedes Benz, to name a few, will be able to easily interact with representatives from Thailand's diverse industries.

Participating buyers will be able to features their part requirements at a **Buyer's Village** while an **Industrial Clinic** will assist entrepreneurs with valuable advice from government and private agencies. The **Academic-to-Business (A2B)** program will help manufacturers link with educational institutions and research agencies, to commercialize their innovations.

FUTURE BUSINESS POTENTIAL

A new feature this year is a special showcase that highlights manufacturing technology and innovation in the **medical device industry**. There is high demand for medical devices and equipment, as medical facilities improve at hospitals and clinics, with old equipment being replaced by more advanced devices. As most of the sophisticated equipment used at present is imported, there are excellent opportunities for investors to explore the Medical Device industry.

SUBCON THAILAND 2016
11-14 May 2016
(Wed.-Sat.)
BITEC BANGKOK THAILAND

UNBEATABLE BUSINESS OPPORTUNITIES
— no one else even comes close!

ASEAN's LARGEST SUBCONTRACTING AND BUSINESS-MATCHING EVENT

Why should you attend SUBCON Thailand 2016?

We invite you to join SUBCON Thailand 2016 and take advantage of this golden opportunity to interact with key industry leaders and attend seminars that will cover business strategies, product development and investment opportunity analyses. This highly successful international event will take place from **Wednesday to Saturday, 11-14 May 2016** at the **Bangkok International Trade and Exhibition Centre (BITEC)**. BITEC is a leading convention center and it is located in Bang Na district in Bangkok. Opening hours are from **10:00 to 18:00**.

Investors considering Thailand will not only have access to the country's local population of 67 million people, but also over three hundred million people in the Greater Mekong sub-region (GMS), over six hundred million in the ASEAN Community and over 3 billion people in the Regional Comprehensive Economic Partnership (RCEP). Given the immense potential that exists here in terms of creating and establishing business partnerships that serve some of the world's largest markets, SUBCON Thailand 2016 is not an event to be missed.

INDUSTRY FOCUS



THAILAND, A GROWING MARKET FOR AUTOMATION AND ROBOTICS

AUTOMATION AND ROBOTICS USHER IN A NEW ERA

Over the past half a century, dynamic advances in automation and robotics have been transforming both business and society. Automation and robotics were initially used to increase productivity on the production floor of factories and utilized simple technologies. Now however, many corporations around the world are transitioning into Industry 4.0, making use of artificial intelligence, big data management, and the Internet of Things (IoT) to seamlessly work together, to exponentially increase both production and productivity.

RIISING AUTOMATION AND ROBOTICS INDUSTRY

Both automation and robotics have gained an important foothold in Thailand's growth and development. Many universities in Thailand offer courses for students interested in this field, with the most specialized course being offered by the Institute of Field

Robotics (FIBO) at King Mongkut's University of Technology, Thonburi.

Many robots developed in-house by universities and private companies, in both the industrial and service categories, have also found use in real world applications. Mahidol University's Bartlab Rescue Robot, Hive Ground's Flare Stack Inspection Drone and Zeabus Autonomous Underwater vehicle (AUV), and CT Asia Robotics's Dinsow Robot are some prominent examples. Given these advances, it is evident that Thai researchers and engineers possess the necessary skills and technical know-how, and that Thailand is ready to be a hub for investment in these areas.

Investors can also draw upon the country's other established advantages, such as its high user base, especially in the Automotive and Electrical and Electronics industries - two prominent areas that demonstrate high automation and robotics growth globally

THAI MARKETPLACE: OPPORTUNITIES

The International Federation of Robotics (IFR) considers the above two industries to be the two major industries that drive global automation and robotics growth. Since 2010, the automotive industry has considerably increased investments in industrial robots worldwide, with an average sales growth (CAGR) of 27% (2010-2014). As for the electrical and electronics industry, global robot sales increased considerably by 34% (2014) to 48,400 units, reaching a new peak due to the rising demand for electronic products and the need to automate production.

These sales growth numbers signify big opportunities in Thailand as the country is a hub for automotive and electrical and electronics production in ASEAN. Thailand ranked 12th globally for motor vehicle production and 6th for commercial vehicle production in 2015. As for the electrical and electronics industry,

Thailand has experienced a 7% growth in export value as measured from 2011, reaching an impressive figure of THB 435 billion (USD 12 billion) in 2015. The country is also renowned for being the second largest global producer and exporter of data storage units like Hard Disk Drives (HDD).

According to FIBO, the import value of machinery related to automation in Thailand is around THB 100 billion (USD 3 billion) per year.

This large import figure showcases the high local demand that exists for these products; the investment opportunities here are huge.

Currently, many big corporations in Thailand, both private and public, are also actively looking to develop systems related to automation and robotics.

BOI INCENTIVES ENCOURAGE GROWTH

The BOI recognizes the importance of **automation and robotics** and they belong to the future industries promoted under the **Super Cluster** category. Examples of activities eligible for incentives in these industries include **microelectronics design, embedded system design, and embedded software**. Recently,

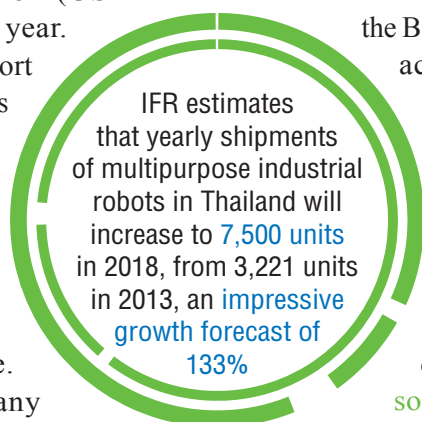
the BOI approved additional activities to expedite investment projects in these future industries.

High value-added software development is one of those additional activities and it includes developing **system software** for advanced technology devices (including

business process management) and developing **industrial software** used to support manufacturing. Investors can apply for general incentives that

include an 8 year income tax exemption and import duty on machinery, and raw materials. However, they can apply for incentives under the Super Cluster policy if they meet certain specific criteria and not only get an 8 year income tax exemption, but also **50% Corporate Income Tax (CIT) reduction for 5 years**. Non-tax incentives include the right to own land and work permits for expatriates.

Activities that include the **manufacture of automation machinery and/or automation equipment with engineering, and the assembly of robots or automation equipment and/or automation parts**, are eligible for an 8 year and 5 year income tax exemption respectively, under general incentives. If the projects qualify though under the Super Cluster category, they will get an 8 year income tax exemption as well as a 50% CIT reduction for 5 years.



NEWS BITES

Thai Robot Helps Scientists Forecast Weather More Accurately

A Thai robot capable of climbing towers to collect air samples is helping scientists monitor pollution and weather conditions at different heights. Built by researchers at Kasetsart University, Bangkok, the robot can analyze greenhouse gases and measure the concentration of minute particles. Scientists can use the data it collects, to model weather patterns and improve their forecast accuracy. The project is important because it represents a new way of monitoring air quality that is automated, reliable, low-cost and low-maintenance. By removing the need for air sampling equipment to be transported by human operators to high locations and the associated costs involved with employing them, the robot represents a safe and long-term solution that will also help scientists to study trends in the context of climate change and urbanization.

Thai Scientists Create Low-Cost Automatic Medicine Dispenser

An automatic medicine dispenser called B-Hive1, has been developed by scientists at the Institute of Field Robotics (FIBO) at King Mongkut's University of Technology Thonburi (KMUTT), in collaboration with the Thailand Center of Excellence for Life Sciences (TCELS) and Supreme Hitera Co., Ltd, under the "Talent Mobility" project. Designed to make dispensing medicines faster, the device is capable of receiving as many as 150 prescriptions per hour directly from doctors and dispensing medication accordingly. Not only is it expected to ease the workload of pharmacists, but it is also much more affordable, costing about half the cost of similar devices. B-Hive1 is ready for commercial use.

COMPANY INTERVIEW

CT ASIA ROBOTICS LEADS THE WAY IN THAILAND'S ROBOTICS REVOLUTION

Advances in Robotics and Automation represent the latest stage in our ongoing digital evolution, providing manufacturers with an edge by speeding up manufacturing processes without sacrificing quality standards. Thailand is making great strides in this area by using industrial robots and service robots to increase overall productivity and enhance the quality of life. **Computer Telephony Asia Robotics** (CT Asia Robotics) is a Bangkok-based innovative company that is taking advantage of this rising robotics revolution to propel itself forward.

Established in 2009, under the leadership of robot pioneer, Mr. Chalermpon Punnotok, CT Asia Robotics, is the **first 100% Thai company to manufacture and develop commercial service robots in Thailand.**

According to the United Nations, there were 901 million people aged 60 years or over in 2015. This figure is projected to rise to 1.4 billion people in 2030

Growing from a small, local company to a world recognized brand in a 6 year timeframe, the company today **employs more than 70 people** and has sold more than 40 robots to date internationally, to countries like Japan and Sweden.

CT ASIA GENESIS

CT Asia originally started out as a software company around 19 years ago, competing with global names like IBM, CISCO, Siemen, and Ericsson. Gaining valuable experience and capital from the software business, Mr. Punnotok eventually founded

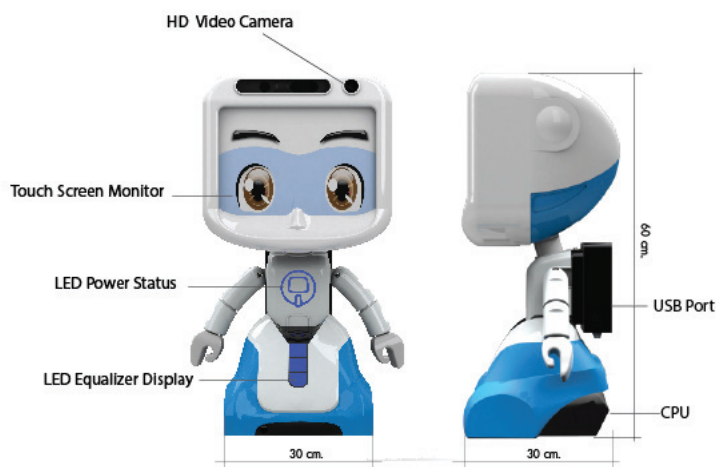
CT Asia Robotics to encompass his larger vision. His goal was to not only bring in more innovation and advanced technology to provide a platform, and offer job opportunities to Thai robotic



competition winners, but to also create a product of lasting value that would gain global recognition.

Investing in the robotics industry made sense, according to Mr. Punnotok, as it was one of the **government-targeted future industries** that not only possessed high value, but also had a high barrier to entry. Deciding to use the robotics platform as a springboard, he studied the opportunities in various industries such as agriculture, tourism and more, before settling on the healthcare industry. **Thailand's world-class medical facilities** were not the only reason for this choice; with **more than 1,000 public and 300 private hospitals nationwide** and an **increasing aging population** both nationally and globally, Mr. Punnotok saw tremendous potential in this sector.





field, he says. Mr. Punnotok advises potential investors eyeing the Thai Robotics industry to leverage existing industries like food, tourism and agriculture, where service robots are virtually nonexistent and address key requirements there.

"The service robot sector has the potential to grow to be three times the size of the industrial robot sector," says Mr. Punnotok, "and in 10 years time, service robots will be more commercialized and more present in everyday life"

DINSOW, THE FIRST 100% THAI ROBOT

Witnessing a key need in terms of the lack of qualified medical staff to take care of a rapidly aging populace, Mr. Punnotok decided to create a service robot that was capable of taking care of the elderly. Bringing the best minds to work on the task from all over the country, the company released the first 100% Thai commercial, service robot, called Dinsow, in 2010. The first generation of Dinsow was initially utilized to entertain customers and serve them meals at 10 branches of the popular MK Suki Restaurant chain. Further research and development on the robot continued, until in 2014, CT Asia Robotics released the third-generation of Dinsow. Equipped with a camera, infrared and thermal sensors, and artificial intelligence, this robot is capable of keeping track of an elderly person's movements, even in a dark room, allowing loved ones to also keep track of them,

"Today, Dinsow is considered to be number one in the world among elderly care robots," says Mr. Punnotok

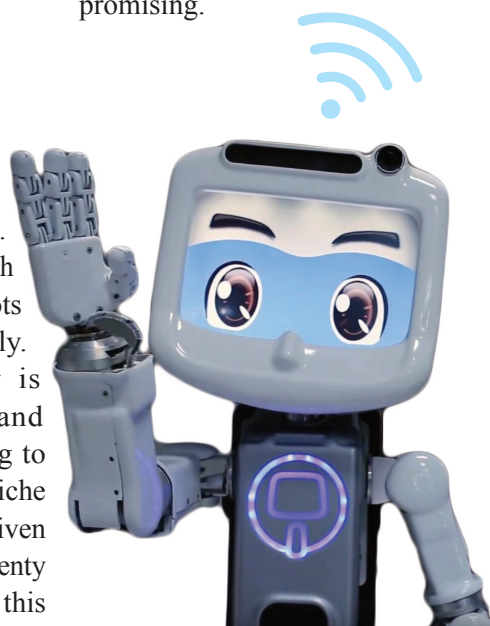
through an accompanying smartphone application. A senior person can also easily call his or her children, or listen to entertainment through the Dinsow robot. In 2014, Dinsow became the first Thai robot to be exported to Sweden and Japan.

CT Asia Robotics continues to partner with Thai and Japanese hospitals and Mr. Punnotok **expects to sell about 100,000 Dinsow robots internationally in the next two years.**

THAI ROBOTICS INDUSTRY: OPPORTUNITIES

Asia's robotics and automation markets are seeing dynamic growth. Mr. Punnotok sees immense growth opportunities in the service robots sector, both locally and globally. The service robots sector is currently in the Research and Development phase, according to Mr. Punnotok, and is still very niche compared to industrial robots. Given the lack of key players, there is plenty of room to grow and advance in this

According to the International Federation of Robotics, the **international market value** for robotic systems is now around **USD 32 billion**. Thailand **ranked 8th in the world** in 2014, for its supply of robotics. However in 2014, the total supply of about **3,700 robots** represented less than 2% of global installations. There is a clear demand here that investors can address. With its immense potential to revolutionize key industries, the opportunities in Thailand's robotics and automation industries have never been more promising.



SHORT ARTICLE

THAILAND ARBITRATION CENTER OFFERS BUSINESS CARE SUPPORT TO INVESTORS



Investors seeking to establish a business in Thailand have the benefit of the country's many advantages, such as its excellent location within ASEAN, its good infrastructure and established logistics systems. However, as with the operation of any business over time, they are likely to face challenges, such as possible disputes with other parties. While a quick resolution benefits all concerned, finding one, might not be the easiest task.

THAILAND ARBITRATION CENTER

This is where the Thailand Arbitration Center (THAC) comes in. Established by the Arbitration Institute Act 2007, under the umbrella of the Ministry of Justice, the THAC provides an independent international standard arbitration platform for resolving cross-border and international business disputes.

Arbitration and mediation are globally recognized as the primary tools for resolving disputes for business, trade, construction, logistics, and investments

The primary advantage of the Alternative Dispute Resolution (ADR) process is that it is comparatively quick. Mediation takes anywhere from **1 to 3 days**, arbitration, from 6 months to 2 years and litigation takes between 5 to 10 years. The speed of the process helps to minimize disruptions to the businesses of the concerned parties. It also allows them to save on lengthy litigation costs, and as the process is private and confidential, this helps to

eliminate possible negative impacts to their reputation, as well as possibly salvaging their working relationship. Other ADR benefits include the possibility for a win/win settlement for mediation. Since Thailand is part of the New York Convention, the award for arbitration is enforceable in **154 countries**.

THAC SERVICES

The THAC provides international standard arbitration and mediation services, and can arbitrate cases in **15 languages**, and mediate cases in 6 languages. The center comes fully equipped with facilities and services for administering ADR cases. It also provides access to the Alternative Dispute Resolution Academy (ADRA), which conducts seminars on the usage of ADR in managing disputes, as well as providing training courses on arbitration and mediation.

The THAC is under the leadership of Managing Director, Pasit Asawawattanaporn, and is located on the 26th Floor, Bhira Tower (Emquartier), Bangkok. For more information, please visit the THAC website at www.thac.or.th or call 02-018-1615 or email info@thac.or.th.

BOI'S MISSIONS AND EVENTS



Deputy Prime Minister, Dr. Somkid Jatusripitak, led the government's investment roadshow in Seoul, Korea, along with the economic team and BOI Secretary General, Mrs. Hirunya Suchinai, from 21st – 25th March 2016. The mission included a seminar entitled “Thailand: Moving Forward to Sustainable Growth” organized by the BOI on 24th March 2016 at Lotte Seoul Hotel.



BOI Secretary General, Mrs. Hirunya Suchinai, chaired the 6th meeting of the Sub-Committee on Enhancement of Business Environment (EBE) under the Japan-Thailand Economic Partnership Agreement (JTEPA) at the Landmark Hotel, Bangkok on 3rd March 2016. The meeting was joined by H.E. Mr. Shiro Sadoshima, Ambassador of Japan to Thailand and representatives from nearly 30 related Thai and Japanese government agencies and private sectors.



BOI Deputy Secretary General, Ms. Ajarin Pattanapanchai, gave a presentation on “New Investment Promotion Measures” at the seminar entitled “BOI Policy Update: Moving Towards a New Engine of Growth” on 11th March 2016 at Napalai Ballroom, Dusit Thani Hotel, Bangkok, in order to publicize the BOI's investment promotion policy to Chinese investors.



The Director of the BOI Taipei Office, Ms. Ratanawimon Naree Sukreekhiet, led an investment mission in Taipei, Taiwan from 20th – 24th March 2016. Activities included a one-on-one meeting with Taiwanese potential investors and a Roundtable Meeting on “Business Opportunities for Thailand - Taiwan Biotechnology Collaboration” on 22nd March 2016, presented by Dr. Nataporn Chanvarasuth, Senior Researcher at the National Science and Technology Development Agency (NSTDA).

THAILAND ECONOMY-AT-A-GLANCE

US\$ = 35.30 THB

DEMOGRAPHICS



POPULATION (2016)
68.0 MILLION



ASEAN POPULATION (2016)
638 MILLION



LITERACY RATE (2015)
97 %

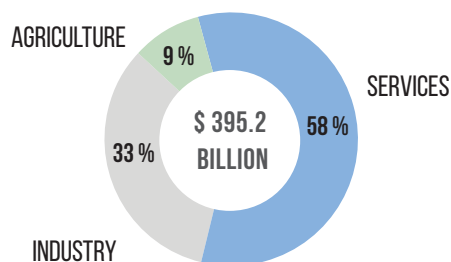
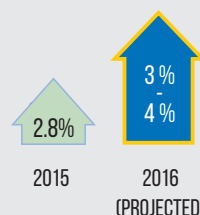
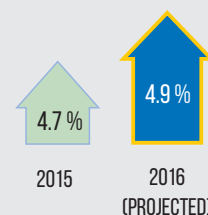


MINIMUM WAGE
300 BAHT/DAY (8.50 US\$)

Source: United Nations

GROSS DOMESTIC PRODUCT

GDP BY SECTOR 2015

GDP/CAPITA
PROJECTED (2016)GDP GROWTH
(%YOY)TOTAL INVESTMENT
GROWTH (%YOY)

Source: NESDB

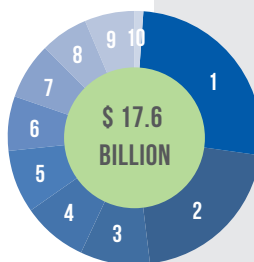
EXPORT FIGURES

THAILAND EXPORT VALUE



Note : *2009-2015 CAGR

TOP 10 EXPORTS (JAN-FEB 2016)



1. Motor cars, parts and accessories (24.0%)
2. Precious stones and jewelry (20.1%)
3. Computer parts and devices (15.9%)
4. Plastic beads (7.0%)
5. Electronic integrated circuits (6.3%)
6. Machinery and parts thereof (6.1%)
7. Rubber products (5.5%)
8. Chemical products (5.4%)
9. Air conditioner and components (4.9%)
10. Rice products (4.7%)

Source : WTO, Ministry of Commerce

OTHER ECONOMIC INDICATORS



\$ 201.7 BILLION
TOTAL EXPORT VALUE
(2015)



\$ 34.6 BILLION
TRADE
BALANCE (2015)



\$ 34.8 BILLION
CURRENT ACCOUNT
BALANCE (2015)



\$ 149.3 BILLION
INTERNATIONAL
RESERVES (2015)



63.9 %
CAPACITY UTILIZATION
(JAN 2016)



96.4 %
MANUFACTURING
PRODUCTION INDEX
(2015)



105.5
HEADLINE CONSUMER
PRICE INDEX (2016)
(The base year is 2011=100)



-0.50
HEADLINE INFLATION
(FEB 2016)

Source : Bank of Thailand, Ministry of Commerce and World Bank

AVERAGE EXCHANGE RATES (AS OF 1 APR 2016)



\$
35.30
THB



€
40.32
THB



£
50.85
THB



¥
31.62
THB



¥
5.51
THB

TAX RATES

10 - 20 %

CORPORATE INCOME TAX

1 - 10 %

WITHHOLDING TAX

7 %

VALUE ADDED TAX

Source : Bank of Thailand

Source : The Revenue Department

The Office of the Board of Investment (BOI) is the principal 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 incentives 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.

BOI OVERSEAS OFFICES



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