



**THAILAND:  
TEXTILE INDUSTRY**

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## Thailand: Textile Industry



Competing among **leading global textile producers**, Thailand's textile industry has developed significantly over the past five decades. From a strong historic base of silk and cotton production, the textiles and apparel market in Thailand is consistently growing and developing to meet ever changing consumer trends.

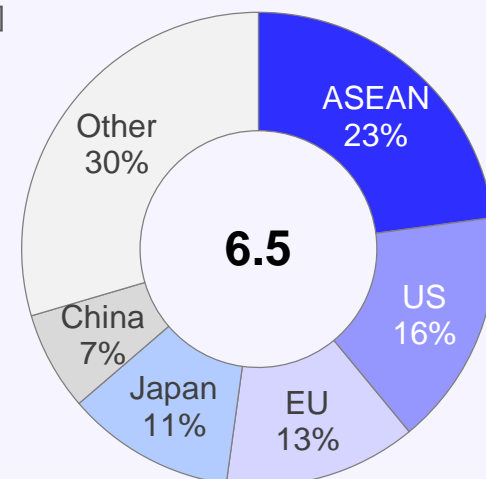
**11<sup>th</sup>**  
Largest

**Asian Exporter of Apparel and Clothing Accessories<sup>1</sup>**

Each year, tremendous volumes of high quality fabrics and apparel from Thailand are sold domestically and exported to rest of the world. **In 2016, the industry's export revenue was valued at almost USD 7 billion, contributing to over 3% of total exports,<sup>2</sup>** with countries in ASEAN, the US, Europe and Japan as key customers.

### Thai Textile & Clothing Exports, 2016<sup>3</sup>

[In Billions USD]





Thailand is one of the few countries in the world that provides the whole value chain of the textile industry, from upstream, midstream, to downstream. With over **4,700 local textile producers**,<sup>1</sup> Thailand hosts a **full range of activities across the entire textile value chain**, ranging from the production of fiber, and fabric, all the way to the design, manufacturing and sales of apparel and functional textiles.

### Value Chain of the Textile Industry



## Raw Materials and Fabrics

### Fibers

#### Thailand's Synthetic Fiber Ranking<sup>2</sup>

**9<sup>th</sup>  
Largest**

**Global Polyester Fiber Producer**

**5<sup>th</sup>  
Largest**

**Global Acrylics Fiber Producer**

Ranked the **9<sup>th</sup> largest polyester producer**, and the **5<sup>th</sup> largest acrylics producer in the world**, Thailand is a leading global producer of synthetic fibers. The country produces approximately **900,000 tons<sup>3</sup>** of synthetic fibers every year. Both the domestic production and local consumption of man-made fibers **had impressive y-o-y growth rates in 2016** at **6.4%** and **12.3%<sup>4</sup>** respectively.

Sources: <sup>1,3</sup>Thailand Textile Institute; <sup>2</sup>Fibers and Filaments; <sup>4</sup>Office of Industrial Economics

With our strong base in the petrochemical industry and cutting-edge technology, Thailand is home to major producers of synthetic fibers in the region, which include many **joint ventures and subsidiaries of multinational companies** such as **Indorama Polyester, Teijin Polyester, and Thai Toray**.



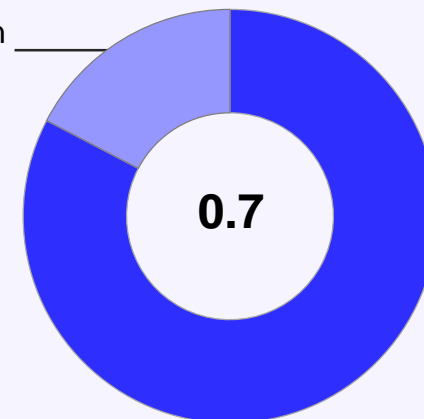
### Yarns

With a continuously developing and evolving textile industry, Thailand has increased its production efficiency to produce high-quality yarns. Thai manufacturers spin more than **800,000 tons of cotton and man-made yarns<sup>1</sup>** each year, of which **70% are consumed domestically**. In 2016, the export of yarns alone was worth over **USD 700 million<sup>2</sup>**. Major export destinations include Indonesia, Taiwan, China and Japan.

#### Thailand Export of Yarns, 2016<sup>3</sup>

[In Billions USD]

Cotton Yarn  
17%



Man-made Yarn  
83%

Sources: <sup>1,3</sup>Thailand Textile Institute  
<sup>2</sup>Thai Customs

## Fabrics



With an abundance of high quality raw materials, Thailand is known for its ability to **weave and knit world-renowned fabrics at a superior quality**. In 2016, Thailand exported over **USD 1.2 billion<sup>1</sup>** worth of fabrics, mainly to ASEAN countries.

Through decades of heavy investments in R&D, Thailand adopted ground-breaking technologies becoming a leading producer of fabrics in the region. Recently, the Thai Textile Institute invented the **“smart fabrics quality mark,”** to support producers in increasing their competitiveness by ensuring their product quality and standards.

## Silk

With almost **USD 4.6 million<sup>2</sup>** in export value each year, Thailand is ranked as the **seventh largest Asian exporter<sup>3</sup>**. Silk has a long history in positively shaping the heritage of the Thai textile industry. Representing a truly authentic Thai fabric, the original hand-woven process showcases the beauty of silk which is unique across the different regions of Thailand.

### Global Thai Silk Brand



### Thailand's Silk Association

- Her Majesty Queen Sirikit's Foundation for the Promotion of Supplementary Occupations and Related Techniques
- Thai Silk Association

## Spandex

Processed from elastomeric synthetic fibers, spandex is a fabric that offers considerable flexibility to many underwear and sportswear brands. The global spandex market is expected to grow at a **CAGR of over 8%** from 2016-2023 for which the **Asia-Pacific is expected to account for more than 60% of global production<sup>1</sup>**. With a number of producers in Thailand, spandex serves as a strong foundation for Thailand's rapidly growing sportswear industry.

### Key Player



## Dyeing, Finishing, and Printing



Currently, Thailand has more than **400 factories<sup>2</sup>** which are operating in the dyeing, finishing and printing of yarns and fabrics to serve the local clothing industry. New and inventive technologies, such as **3D and digital printing**, are being applied to further increase the value of fabrics.

An increasing number of Thai factories are also shifting their production lines to **advanced automation** including Luckytex (Thailand) PLC and Erawan Textile Co., Ltd.

### Key Players



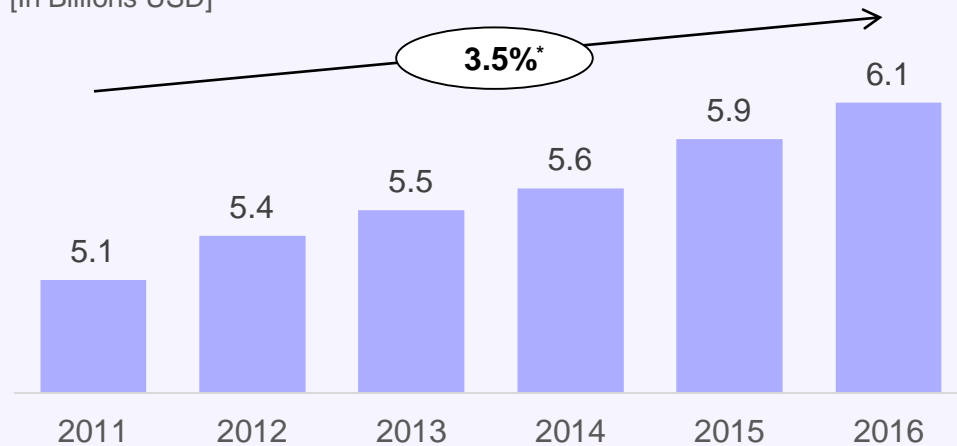
## Finished Products



In addition to the textile market, finished clothing products are thriving in Thailand including both apparel and non-apparel items. **The apparel retail market has been growing at 3.5% year-on-year, triple the global growth rate.<sup>1</sup>**

### Thailand's Apparel Retail Value<sup>2</sup>

[In Billions USD]



### Key Players



## Designer Items and the Fashion Industry

Having chosen Bangkok as a Global Fashion Capital, Thailand's fashion industry is doing exceptionally well with its exquisite designs, and advanced manufacturing processes and standards. With strong government support, for over 10 years, the country hosts many well-regarded regional and international fashion events including **Bangkok International Fashion Week, Elle Bangkok Fashion Week, and the Bangkok International Fashion Fair.**

Moving beyond typical cut-make-and-trim OEM production, the country is also home to many Thai designer brands, including **NaRaYa, AIIZ, Jaspal, CPS Chaps, Sretsis, Disaya, and Doi Tung** which have taken successful steps in increasing their brand awareness throughout the world, as well as other brands such as **Dry Clean Only** which are well-known among Hollywood celebrities.



### Key Players

AIIZ

DAPPER

DISAYA

DOI TUNG



DRY CLEAN ONLY  
BANGKOK

FLYNOW

GREYHOUND  
ORIGINAL

JASPAL

MC GROUP



SIRIVANNAVARI  
BANGKOK



## Apparel

Offering a complete value chain, over **80%** of raw materials including fabrics and yarns can be sourced locally, as Thailand is home to more than **2,100 clothing manufacturers**.<sup>1</sup> The country is known for its highly-skilled and competitive workforce and product quality. A number of well-known global brands, including **Nike, Adidas, and GAP**, outsource their production to Thailand.

Large clothing manufacturing companies, such as **High-Tech Apparel Co., Ltd., ICC Co., Ltd., Hong Seng Knitting Co. Ltd., Nan Yang Textile Co. Ltd., and Sahapat Co., Ltd.**, continue to dominate the Thai market, and deliver high quality clothing to the rest of the world. The major export destinations include the US, EU, Japan, China and Vietnam.



## Womenswear and Menswear

Growth in the Thai womenswear and menswear market in 2016 was **4% and 3%** respectively.<sup>2</sup> The market for both womenswear and menswear is expected to reach **USD 3.5 billion and USD 2.6 billion by 2021**.<sup>3</sup> While the Thai womenswear market is slightly larger than the menswear market, male customers tend to have a greater sense of loyalty to their favorite brands. A number of global brands are performing very well in the Thai market including **Uniqlo, H&M, Zara and G2000**.

## Jeans

The jeans market in Thailand is expected to reach **USD 426.7 million in sales by 2021**.<sup>1</sup> Jeans will remain a favorite leisurewear item among consumers' worldwide for the foreseeable future. **Mc Jeans** is a successful Thai brand that has grown in popularity throughout the region in addition to imported brands such as Levi's and Diesel.



## Undergarments

Undergarments in Thailand reached sales of **USD 1.7 billion in 2016**, an annual growth rate of 6.5% from 2011.<sup>2</sup> Among all womenswear categories, women's undergarments maintained the highest value in terms of sales. Thailand is a production hub for many global undergarment brands including **Wacoal, Triumph, J.Press and Arrow**. Undergarments produced in Thailand are recognized for both their high quality and durability from the complete value chain and the superiority of synthetic yarns supplied by local producers.

### Key Players

**ARROW**

*Sabrina*

**J.Press**

**Triumph**  
INTERNATIONAL

**ROSSO**  
men's underwear

**Wacoal**

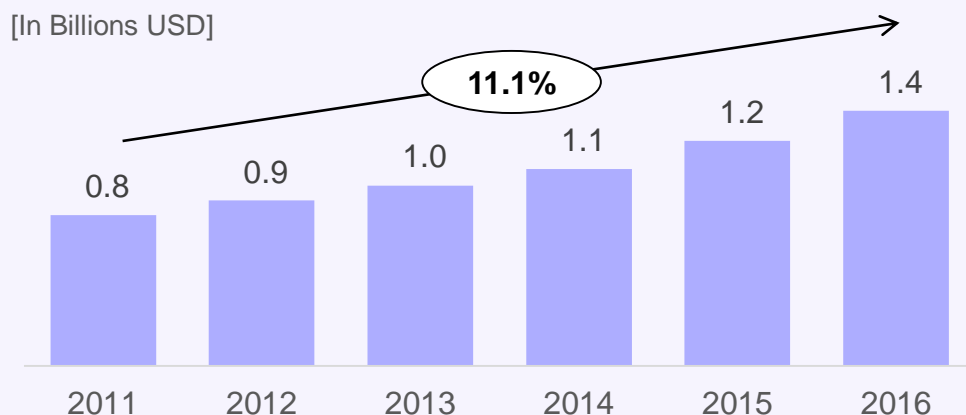
## Sportswear



Thanks to the increasing interest in health and wellness, sportswear is enjoying a **double-digit growth rate** and is valued at **USD 1.3 billion**.<sup>1</sup> While men are the core consumers of sportswear, an increasing number of women are making purchases in this category, since more are leading active lifestyles and spending increased time exercising on a regular basis. Consumers in Thailand tend to wear sportswear for both fashion and functional purposes, due to the ongoing health and wellness trends. Companies such as **High-Tech Apparel Co., Ltd.**, **Tuntex Textile (Thailand) Co., Ltd.**, **Thai Asahi Kasei Spandex Co., Ltd.**, **Nice Apparel Co., Ltd.**, and **Sahapat Co., Ltd.** are meeting the production needs of the growing sports market.

### Sales of Sportswear in Thailand<sup>2</sup>

[In Billions USD]



Source: <sup>1,2</sup> Euromonitor

## Non-Apparel

### Home Textiles



Thailand's home textile products, including bedding, curtains, bathroom textiles, and carpets, are exported throughout the world. What sets apart Thai home textile products from other countries are their delicate designs and hand-woven processes, ensuring that products achieve a premium quality that is widely recognized around the world. In 2016, **Thailand exported over 121,000 tons of home textiles**, at a value of **over USD 260 million**.<sup>1</sup>

In addition to their attractive designs, various companies including PASAYA and TAI PING have developed state-of-the-art innovation into their wide-range of products, such as flame retardant and anti-allergic fabrics, to cater to changes in customer preferences.

### Key Players

Carpets Inter®

JIM THOMPSON

PASAYA

SANTAS®  
HOME

TAI PING

TPCORP

Source: <sup>1</sup>Thailand Textile Institute

# Established Wholesale Textiles Markets

In addition to extensive textile and clothing manufacturing, Thailand also hosts one of the largest garment marketplaces, and world-renowned fashion districts in the region.



Originating from the influx of Chinese immigrants in the early 1900s, **Bobae Market** was established to allow the newly arrived migrants to make a living. Today, Bobae has grown into **one of the largest marketplaces for textile products in Asia with over 3,000 shops.**<sup>1</sup> It is well-known for its high quality products which are available at competitive prices. The market serves as a major fabric sourcing location for Thai designers. Many foreign customers from Cambodia, Laos, Vietnam, Malaysia and Singapore also order fabrics directly from Bobae, resulting in trading value worth over **USD 900 million annually.**<sup>2</sup> Additional wholesale textile markets include **Sampeng** and **Pahurat**, while the more famous wholesale clothing markets among locals and tourists alike include **Chatuchak weekend market**, **Platinum Mall** and **Pratunam** in Bangkok.

Source: <sup>1,2</sup> King Prajadhipok's Institute

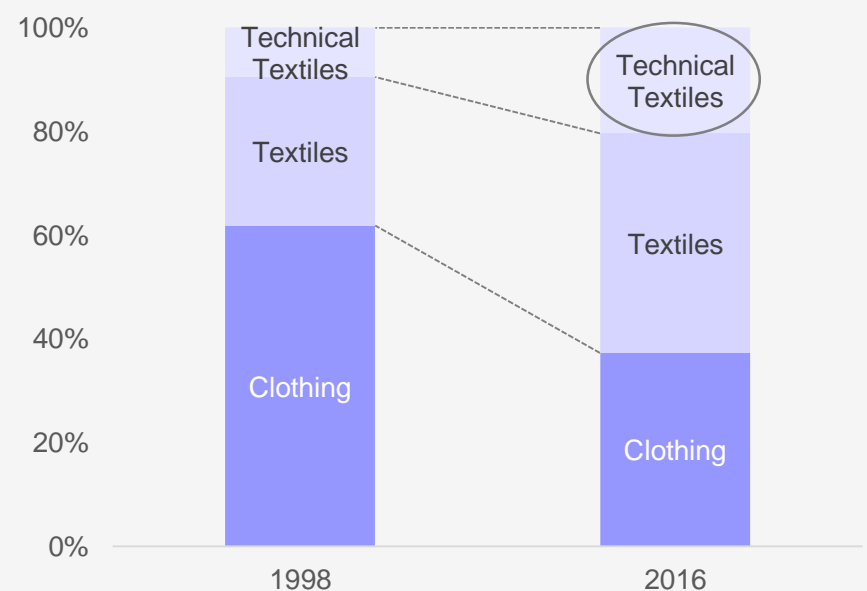
# Opportunities

Thailand is ramping up its competitiveness by focusing on innovation, value-added products and technologies. The government is providing additional incentives along with infrastructure development to further support growth in the country's textile industry.

## Technical Textiles

The global technical textile market is expected to **exceed USD 160 billion by 2020.**<sup>1</sup> To serve this growing market, Thailand's textile industry has been significantly enhanced in both its variety and functionalities, offering fabrics with functions that go far beyond clothing and home furnishings. Currently, the country is ranked as the **28<sup>th</sup> largest exporter of functional textiles.**<sup>2</sup> With groundbreaking technologies and advanced capacities, Thai manufacturers are offering products with unique and cutting-edge properties, ranging from **flame retardant**, **temperature regulated** and **antimicrobial** fabrics.

## Changing Export Structure - Thailand's Textiles Industry<sup>3</sup>



Sources: <sup>1</sup> Global Industry Analysts, Inc.; <sup>2</sup> International Trade Administration  
<sup>3</sup> Thailand Textile Institute



## Mobiltex

Automotive textiles represent the most valuable market for functional textiles in the world. These materials offer a wide range of applications. It is estimated that **by 2020, over 35 kilograms of an automobile's total weight will be from fabrics**, increasing from 26 kilograms in 2010.<sup>1</sup> More than half of automotive textiles are for interior trim such as carpets, seat covers, doors, and roof liners – apart from being used to strengthen tires, hoses, safety belts and air bags.



Currently, Thailand has **over 100 automotive textile manufacturers**.<sup>2</sup> A number of leading Japanese automotive textile companies have their production plants in Thailand. As the largest automotive producer in Southeast Asia, Thailand manufactured more than **1.9 million vehicles in 2016**<sup>3</sup> making the country an ideal location for automotive textile production in the world.

### Key Players



SAHA SEIREN



TEIJIN  
Human Chemistry, Human Solutions

TTN THAI TECHNICAL NONWOVEN

TPCORP  
TEXTILE PRESTIGE PUBLIC COMPANY LIMITED

'TORAY'  
Innovation by Chemistry

Sources:<sup>1</sup> Office of Industrial Economics; <sup>2</sup> Thailand Textile Institute  
<sup>3</sup> OICA as of March 2017

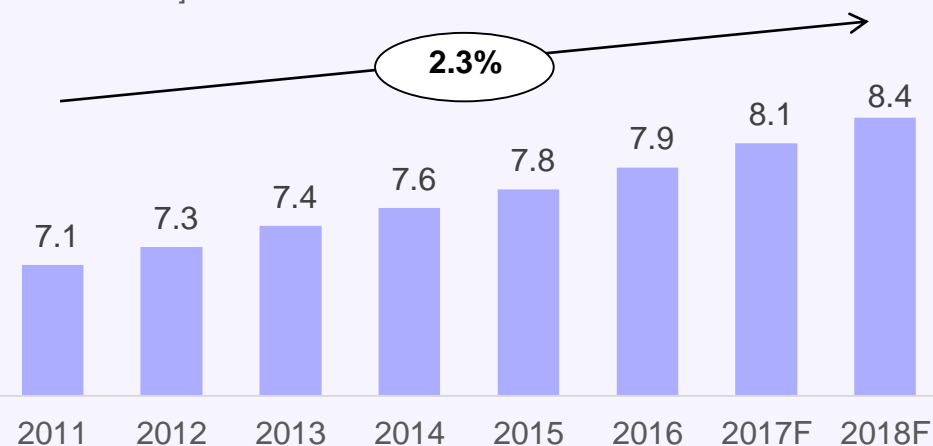
## Protective Textiles



Protective textiles, ranging from particulate protection, flame retardant, to cut resistant, are designed to protect the wearer from harsh environmental effects that may result in injuries or death. The demand for protective textiles in Thailand continues to increase annually, and is expected to reach **USD 8.4 billion in 2018**.<sup>1</sup> The **flame-resistant suit** is one of the most common protective uniforms. Thailand is home to many leading protective textile manufacturers including **Insuretex** and **Glofab**, which serve both local and foreign markets.

### Sales of Protective Textiles in Thailand<sup>2</sup>

[In Billions USD]



Source:<sup>1,2</sup> Thailand Textile Institute

## Medtex

In 2016, the combined market for medical devices in the ASEAN Economic Community (AEC) was approximately USD 2.8 billion. **Thailand, as an international medical hub, had the largest market share at 28%**, followed by Malaysia, Indonesia and Vietnam.<sup>1</sup> As a result of the huge local demand in healthcare and hygiene products, it is expected that by 2019, the country will need more than **700,000 medical uniforms**, excluding surgical and patient clothing.<sup>2</sup> With **roughly 59 manufacturers** in 2016, the value of Thailand's medical textiles reached **USD 600 million** with an average annual growth rate of 3.4%.<sup>3</sup>

### Key Players



## Agrotex



Thailand is privileged to be **one of the top locations for agriculture. A total of 35% of the country's workforce is employed in the agricultural sector**, resulting in an excellent ecosystem for farming.<sup>4</sup> With a wide variety of quality crops, Thailand is the **world's top exporter of cassava, sugar, rice and palm oil**. Agricultural textile products, such as **soil-moisture retention** and **agricultural nonwoven bags**, offer high growth potential, and are expected to boost productivity in farming in the long-run.

### Key Players



New World International

Sources: <sup>1</sup> Office of Industrial Economics, Thailand  
<sup>2,3</sup> Thailand Textile Institute  
<sup>4</sup> National Food Institute, Thailand

## Nanotechnology in Textiles

### Water-repellent Fabrics

One of the first products produced through nanotechnology was a water-repellent fabric, and this market is expected to reach **over USD 2 billion globally in 2024**.<sup>1</sup> This technology enhances the customer's experience, and is continuing to bring huge returns and growth to manufacturers.



### Anti-bacterial Textiles

Driven by increasing **trends in health and wellness**, consumers are becoming more informed about hygiene. Antibacterial textiles, a pioneer in the textile industry, were established to serve many sectors across the region. A number of functional textile manufacturers are shifting to produce **anti-bacterial products**, such as sportswear, bandages, and medical uniforms. **Perma Corporation** is the leading producer in developing Nano Zinc Technology, the first permanent anti-bacterial textile in Asia.

### Key Players



THAI TAFFETA.CO.,LTD.



Union Pioneer PCL  
บริษัท ยูเนียนไพโอเนียร์ จำกัด (มหาชน)

Source: <sup>1</sup> Hexa Research

# Why Thailand?

## Completed Value Chain



With a complete value chain, Thailand has roughly **4,700 textile manufacturers**, ranging from fibers, yarns, dyeing to clothing.<sup>1</sup> The textile industry has developed significantly for over 50 years passing on the knowledge, expertise and competencies of manufacturers from previous generations. Combined with cutting-edge technologies, Thailand has become the main producer and exporter of several textile products, qualified by global standards.

To further increase its competitiveness and productivity, a number of manufacturers are employing the **smart factory** concept, utilizing computerized systems to increase efficiencies in their production processes. In addition to strong environmental regulations and standards, Thai producers are also moving towards green production by supporting recycled raw materials and generating more advanced solid waste management plans.



# Why Thailand?

## Highly-skilled Workforce



The Thai workforce is known around the world for their **amazing craftsmanship**. To enhance its competitiveness, the Thai government is working hard to ensure a robust labor force for the textile industry. The country is equipped with well-qualified researchers and experts covering every process dealing with textile production. Currently, there are roughly **500,000 workers employed in this important sector**.<sup>1</sup>

## Strategic Location with Excellent Logistics Networks



Positioned in the **best location in Southeast Asia**, Thailand is well-connected to ASEAN and other countries in the Asia-Pacific. The more than 640 million consumers across Southeast Asia offer numerous opportunities for the textile industry. **World-class infrastructure** such as Suvarnabhumi International Airport, Laem Chabang deep sea port, and other trade routes allow Thailand to connect with many destination countries. Combined with FTAs with ASEAN countries, Thailand is more than ready to better serve logistics needs.

# Investment Incentives

## BOI Incentives



The BOI recognizes the importance and value of the textile industry, and offers a wide range of tax and non-tax incentives for projects that meet national development objectives.

### Non-Tax Incentives

These activities also receive the following non-tax incentives:

Permit to bring in expatriates

Permit to own land

Permit to take or remit foreign currency abroad

### Tax Incentives

GROUP	ELIGIBLE ACTIVITIES	INCENTIVES	
		Corporate income tax exemption	Exemption of import duty*
A1	• Creative product design and development center	8 years (No Cap)	✓
A2	• Manufacture of technical fibers or functional fibers	8 years	✓

**Note:** \* Exemption of import duty on machinery and raw or essential materials used in manufacturing export products

# Investment Incentives

## Tax Incentives

GROUP	ELIGIBLE ACTIVITIES	INCENTIVES	
		Corporate income tax exemption	Exemption of import duty*
A3	<ul style="list-style-type: none"> <li>• Manufacture of functional yarns or functional fabrics</li> <li>• Bleaching, dyeing and finishing, or printing and finishing, or printing</li> </ul>	5 years	✓
A4	<ul style="list-style-type: none"> <li>• Manufacture of recycled fibers</li> <li>• Manufacture of other yarns or fabrics**</li> <li>• Manufacture of garments, clothing accessories, and household textiles**</li> <li>• Manufacture of non-woven fabrics or hygienic products made of non-woven fabrics</li> </ul>	3 years	✓
B1	<ul style="list-style-type: none"> <li>• Manufacture of other fibers or fabrics</li> <li>• Manufacture of other yarns or fabrics***</li> <li>• Manufacture of garments, clothing accessories, and household textiles***</li> </ul>	-	✓

**Note:** \* Exemption of import duty on machinery and raw or essential materials used in manufacturing export products

\*\* Projects with investments or expenditures on research, design or product development of not less than 0.5% of the project's total revenue of the first 3 years combined.

\*\*\* Projects with no investment or expenditures on research, design or product development or if the investment on research, design or product development is less than 0.5% of the project's total revenue of the first 3 years combined.

## Supporting Organizations



### Thailand Textile Institute

Supports the textile industry through various segments such as Innovation, Design and Networks for increased competitiveness to meet local, regional and global requirements.



### Textile Industry Club

Supports and strengthens the relationship between the club's members to further improve the network in order to enhance efficiency in the textile industry.



### Thai Garment Manufacturers Association

Supports ASEAN's fashion and apparel businesses globally and leverages ASEAN's resources and markets to create value added in Thailand.



### Thai Textile Merchants Association

Exchanges information and data resources to help resolve its members' difficulties such as labor and tax laws, and implements knowledge for textile businesses to increase production, marketing and investments.



### Thai Weaving Industry Association

Aims to develop the Thai textile and weaving industry by improving production methods, the quality of woven fabrics, dyeing techniques, printing and finishing to stay close to fashion trends and adapt to changes.



### The Thai Silk Association

Preserves Thai silk as an exceptional cultural heritage, prevents silk that is shipped as claiming to be Thai silk, and supports efforts to ensure that authentic silk remains well-known around the world.



### The Association of Thai Bleaching, Dyeing, Printing and Finishing Industries

Represents wet processing manufacturers with a function to disseminate knowledge and act on the suggestions of members to concerned governmental organizations in the formulation of national policies.



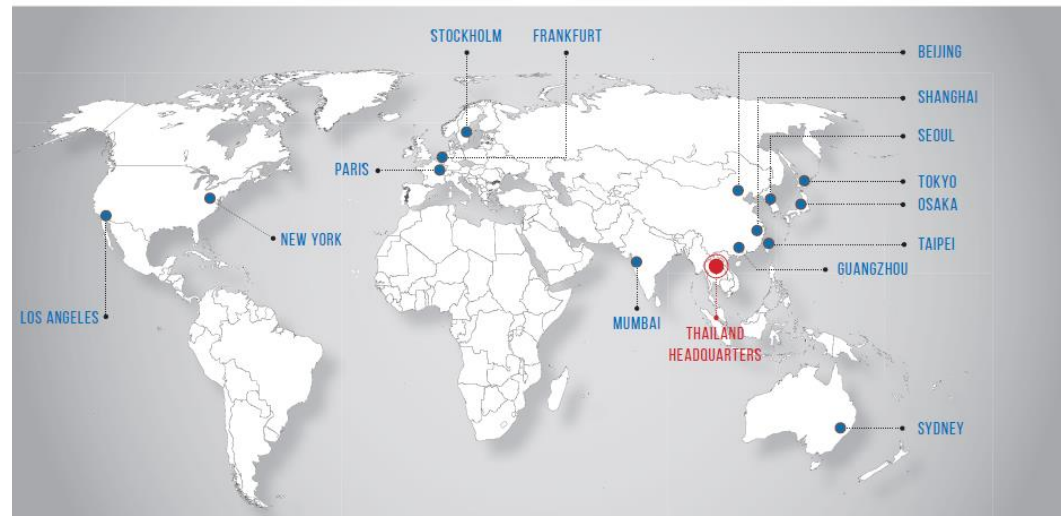
### The Bobae Garment Association

Promotes economic policies in support of the association, facilitates information services to both local and international partners, and supports members in the export of their products.

## BOI's Worldwide Network



## THAILAND BOARD OF INVESTMENT



### HEAD OFFICE, OFFICE OF THE BOARD OF INVESTMENT

555 Vibhavadi-Rangsit Road, Chatuchak, Bangkok 10900 Thailand

Website : [www.boi.go.th](http://www.boi.go.th) Email : [head@boi.go.th](mailto:head@boi.go.th)

#### New York

Thailand Board of Investment,  
New York Office  
7 World Trade Center, 34<sup>th</sup> FL, Suite F  
250 Greenwich St., New York, NY  
10007 USA  
Tel. : +1 212 422 9009  
Fax : +1 212 422 9119  
Email : [nyc@boi.go.th](mailto:nyc@boi.go.th)

#### Paris

Thailand Board of Investment,  
Paris Office  
Ambassade Royale de Thaïlande  
8, Rue Greuze  
75116 Paris, France  
Tel. : +33 1 5690 2600-1  
Fax : +33 1 5690 2602  
Email : [par@boi.go.th](mailto:par@boi.go.th)

#### Mumbai

Thailand Board of Investment,  
Mumbai Office  
Royal Thai Consulate-General,  
Express Tower, 12<sup>th</sup> Floor, Barister  
Rajni Petel Marg, Nanam Point,  
Mumbai, Maharashtra 400021  
Tel. : (91 22) 2204 1589-90  
Fax : (91 22) 2282 1525  
Email : [mumbai@boi.go.th](mailto:mumbai@boi.go.th)

#### Beijing

Thailand Board of Investment,  
Beijing Office  
Royal Thai Embassy  
No.40 Guang Hua Road,  
Beijing, 100600, P.R.China  
Tel. : +86 10 6532 4510  
Fax : +86 10 6532 1620  
Email : [beijing@boi.go.th](mailto:beijing@boi.go.th)

#### Tokyo

Thailand Board of Investment,  
Tokyo Office  
Royal Thai Embassy, 8<sup>th</sup> Floor,  
Fukuda Building West, 2-11-3  
Akasaka, Minato-ku, Tokyo  
107-0052 Japan  
Tel. : +81 3 3582 1806  
Fax : +81 3 3589 5176  
Email : [tyo@boi.go.th](mailto:tyo@boi.go.th)

#### Los Angeles

Thailand Board of Investment,  
Los Angeles Office  
Royal Thai Consulate-General  
611 North Larchmont  
Boulevard, 3<sup>rd</sup> Floor,  
Los Angeles, CA 90004 USA  
Tel. : +1(0) 323 960 1199  
Fax : +1(0) 323 960 1190  
Email : [boila@boi.go.th](mailto:boila@boi.go.th)

#### Frankfurt

Thailand Board of Investment,  
Frankfurt Office  
Bethmannstr 58, 5.OG  
60311 Frankfurt am Main  
Federal Republic of Germany  
Tel. : +49 69 9291 230  
Fax : +49 69 9291 2320  
Email : [fra@boi.go.th](mailto:fra@boi.go.th)

#### Taipei

Thailand Board of Investment,  
Taipei Office  
Taipei World Trade Center, 3<sup>rd</sup> Floor,  
Room 3E40, No.5, Xin-yi Road,  
Sec.5 Teipei 110, Taiwan, R.O.C.  
Tel. : +88 6 2 2345 6663  
Fax : +88 6 2 2345 9223  
Email : [taipei@boi.go.th](mailto:taipei@boi.go.th)

#### Shanghai

Thailand Board of Investment,  
Shanghai Office  
Royal Thai Consulate General  
2<sup>nd</sup> Floor, 18 Wanshan Road,  
Changning District, Shanghai  
200336, P.R. China  
Tel. : +86 21 6288 3030 ext 828, 829  
Fax : +86 21 6288 3030 ext 827  
Email : [shanghai@boi.go.th](mailto:shanghai@boi.go.th)

#### Osaka

Thailand Board of Investment,  
Osaka Office  
Royal Thai Consulate-General,  
Osaka, Bangkok Bank Bldg. 7<sup>th</sup> Floor  
1-9-16 Kyutaro-Machi, Chuo-Hu  
Osaka 541-0056 Japan  
Tel. : +81 6 6271 1395  
Fax : +81 6 6271 1394  
Email : [osaka@boi.go.th](mailto:osaka@boi.go.th)



#### Stockholm

Thailand Board of Investment,  
Stockholm Office  
Stureplan 4C, 4<sup>th</sup> Floor,  
114 35 Stockholm, Sweden  
Tel. : +46 8 463 11 58  
+46 8 463 11 72  
+46 8 463 11 74-75  
Fax : +46 8 463 11 60  
Email : [stockholm@boi.go.th](mailto:stockholm@boi.go.th)

#### Seoul

Thailand Board of Investment,  
Seoul Office  
#1804, 18<sup>th</sup> Floor, Daeyungak Tower  
25-5, 1-KA, Chungmu-Ro,  
Chang-Ku, Seoul, 100-706, Korea  
Tel. : +82 2 319 9998  
Fax : +82 2 319 9997  
Email : [seoul@boi.go.th](mailto:seoul@boi.go.th)

#### Guangzhou

Thailand Board of Investment,  
Guangzhou Office  
Investment Promotion Section  
Royal Thai Consulate-General,  
No. 36 Youhe Road, Haizhi District,  
Guangzhou, P.R.C. 510310  
Tel. : +86 20 8385 8988 ext. 220-225  
+86 20 8387 7770 (Direct Line)  
Fax : +86 20 8387 2700  
Email : [guangzhou@boi.go.th](mailto:guangzhou@boi.go.th)

#### Sydney

Thailand Board of Investment,  
Sydney Office  
Level 1, 234 George Street, NSW  
2000, Australia  
Tel. : +61 2 9252 4884  
Fax : +61 2 9252 2883  
Email : [sydney@boi.go.th](mailto:sydney@boi.go.th)