



A General Scope of Thailand's Economy and Roles of Thai Ports and Terminals

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Thailand is an upper middle-income country with strong production bases and significant presence in global economy in agriculture, manufacturing, and service sectors. Thai economy is open to free trade and international investment. The country is geographically located at the center of ASEAN, the region of which the economy and population accounts for 0.54 and 0.89 percent of global GDP and population respectively (2015).

GDP Growth (%)	Avg. 1961-2015
World	3.45
China	8.28
Indonesia	5.61
Korea	7.28
Malaysia	6.35
Philippines	4.23
Singapore	7.50
Thailand	6.10

Thailand's Global Economic Ranking
5 th Largest Tourist Receipts (2014)
11 th Largest Agricultural Output (2015)
16 th Largest Manufacturing Output (2015)
1 st Largest Hard Disk Drive Producer (2015)
1 st ASEAN Largest Automobile Producer (2015)
1 st ASEAN Largest Electronic Appliance Producer (2015)
22 nd Largest Economies by Purchasing Power (2015)
31 st Largest Economies (2015)
34 th Largest Services Output (2015)

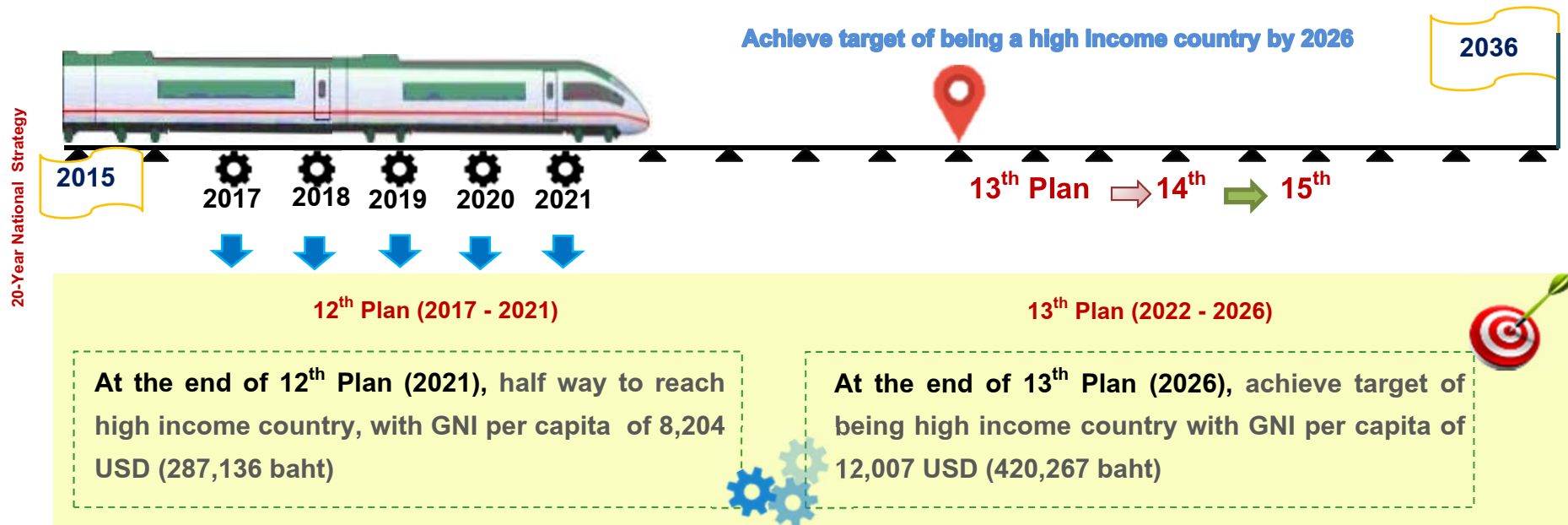
Economic Stability	2015
GDP (USD)	395,281.58
Per capita GDP (USD)	6,071.91
Current account (% of GDP)	8.87
Foreign Debt to GDP (%) (End of Q1/16)	33.23
Foreign Reserves to Short-term Debt (%) (End of Q1/16)	322.64

Export	2015
Total Export (Million USD)	212,109
Global Ranking in Export (2015)	20
Global Ranking in Agricultural Export (2014)	8
Global Ranking in Manufacturing Export (2014)	13
Global Ranking in Tourism as Service Export (2014)	5

Economic Development in Medium- and Long-term

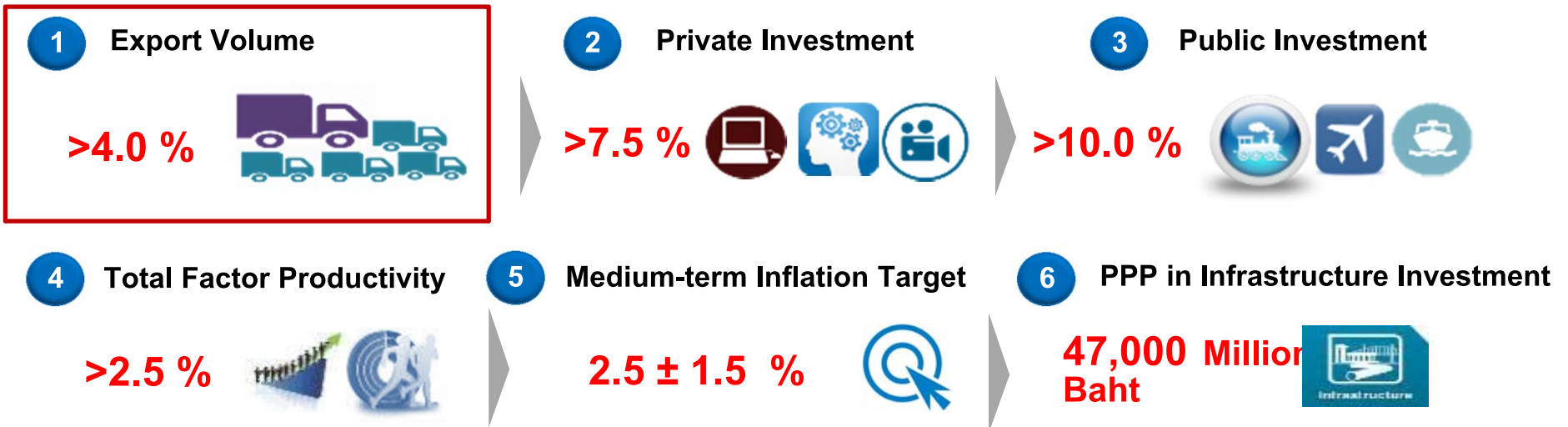


Under the National Strategy, Thailand is aimed to become a high income country with per capita GNI of no less than 13,000 USD by 2036 (at the end of the 15th NESDP Plan. However, if Thailand could be reformed according to the reform plan, Thailand could reach the target of higher income as soon as at the end of 13th Plan. Economic development in medium and long term will focus on enhancing economic growth and competitiveness. This shall be realized by increasing efficiency of the economic system and promoting investment in R&D, development of STI as key drivers for growth. There needs to be reforms in economic, social, environmental structures, as well as the rules and regulations to be favorable for doing business and in line with chaining economic, social and environmental landscape. However, the challenges line in the next 5 years when the world economy is still recovering and Thailand is in the initial stage of reform. Investment is an important growth driver in this period



Goal: Macroeconomic development during 12th Plan (First 5 Years of the National Strategy)

Annual growth of more than 5%, Income per capita to reach 8,200 USD by the end of 12th Plan in 2021.



Roles of Thai Ports and Terminals in Supporting Trade and Economic Growth

Sea transport is the major mode of transportation used for international trade. Volume of export (in weight) continues to grow. In 2014, Export volume was at 126.6 mill tons with 88% transported by ships, and road serves as secondary mode of transport (around 12% of total volume). Similarly, the majority of imported goods are transported by Sea.

Import Volume (kiloton)

Export Volume (kiloton)

Transportation mode	2011	2012	2013	2014	Share % in 2014	Transportation mode	2011	2012	2013	2014	Share % in 2014
Ship	92,965	92,976	87,391	93,070	87.81	Ship	100,675	101,342	98,696	111,223	87.85
Rail	13	8	7	4	0.00	Rail	133	95	90	76	0.06
Road	12,689	12,194	12,723	12,629	11.92	Road	10,779	12,380	13,419	14,896	11.77
Air	282	319	282	287	0.27	Air	443	427	397	409	0.32
Other modes	2	1	1	1	0.00	Other modes	1	1	0	0	0.00
Total	105,951	105,498	100,404	105,991	100	Total	112,030	114,245	112,603	126,604	100

RT

EXP

Source : Ministry of Transportation

Value of export and import per transport mode

Value of export per transport mode

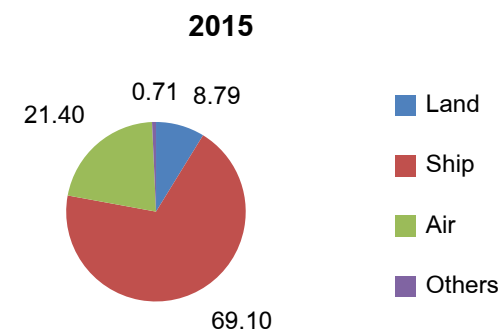
M.TH.B	2015					2016			
	Year	Q1	Q2	Q3	Q4	Q1	Apr	May	5M
Land	635,235	153,857	157,094	154,912	169,373	159,966	51,573	56,852	268,391
Ship	4,994,317	1,204,477	1,217,617	1,289,434	1,282,790	1,303,549	369,440	414,026	2,087,014
Air	1,546,521	361,033	361,032	421,436	403,020	449,433	116,629	138,668	704,730
Others	51,088	12,668	8,332	12,742	17,346	10,846	2,199	2,123	15,168
Total	7,227,161	1,732,035	1,744,074	1,878,524	1,872,529	1,923,794	539,841	611,669	3,075,304

Value of import per transport mode

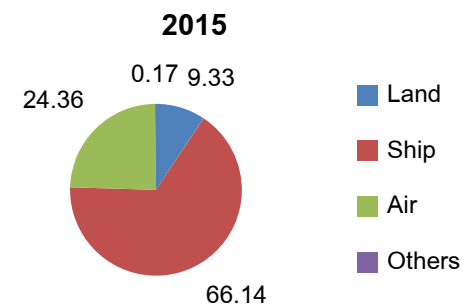
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Source : Bank of Thailand

Structure of Export by Mode of Transportation



Structure of Import by Mode of Transportation



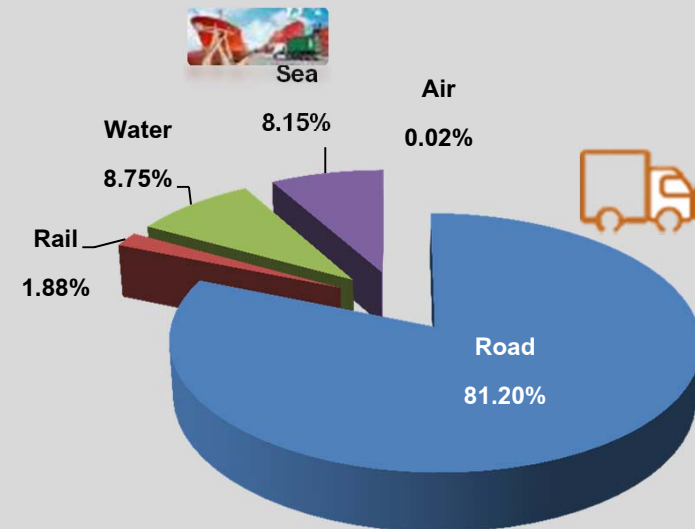
Most of domestic transport of goods is by road (81.2%)

Domestic Transport of Goods (mil. ton)

Transportation mode	2011	2012	2013	2014	Growth % in 2014
Road	442.667	458.781	458.828	465.020	0.50
Rail	10.864	10.758	11.817	10.792	-1.12
Water	46.932	47.422	45.413	50.113	1.14
Sea	41.273	44.261	45.441	46.673	6.25
Air	0.131	0.130	0.119	0.113	-1.50
Total	541.868	561.352	561.618	572.712	0.91

Source : Ministry of Transportation

Domestic Transport of Goods in 2014



Capacity of Key Seaports under Government Supervision

Bangkok Port

Port Capacity : 2 x 20,000 DWT
Volume of Cargo : 1 mil. tons (2015) 61,245 TEU
Type of Port : Port for general goods and cargo goods
Import Goods : Crude oil, metal sheet products, chemical products
Export goods : Rice, sugar, corn

Ranong Port

Port Capacity : 2 x 500 Gross ton and 1 x 12,000 DWT
Volume of Cargo : 86,788 tons (2015), 967 TEU
Type of Port : Multipurpose seaport / Cargo port
Import Goods : Offshore Supplies
Export goods : Offshore Supplies

Phuket Port

Port Capacity : 2 x 20,000 DWT
Volume of Cargo : 309,385 tons (2014)
Type of Port : Cargo port
Import Goods : Tin, petroleum
Export goods: rubber, Tin



Laem Chabang Port

Port Capacity : 80,000 DWT
Volume of Cargo : 73.5 mil. tons (2015) 6.8 mil. TEU
Type of Port : Port for general goods and cargo goods
Import Goods : Fuel, electric circuits, computers
Export goods : Rice, cement, sugar

Maptaphut Port

Port Capacity : 100,000 DWT
Volume of Cargo : 39.6 mil. tons (2014)
Type of Port : General port and liquid goods
Import Goods : Crude oil, fuel, steel and iron
Export goods : rubber wood, construction materials

Songkla Port

Port Capacity
 - Multipurpose port 2 x 20,000 DWT
 - Cargo port 1 x 20,000 DWT
Volume of Cargo
 - Multipurpose port 2 mil. tons (2014)
 - Cargo port 151,551 TEC
Type of Port : general ships/cargo ships
Import Goods : frozen tuna
Export goods : rubber, frozen seafood

Source : Ministry of Transportation

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Roles of Thai Ports and Terminals in Supporting Trade and Economic Growth

- Ports function as important gateways for domestic and international trade. Hence ports tends to be regarded as major accelerators of local economic development in the age of globalization as shipping and port industries play an important role in integration of local and national economies into the international economy.
- In the world of rising competition, convenient and efficient logistic services of the ports play a key role in promoting competitiveness of trade.
- In relation, Thailand port competitiveness is necessary condition. This could be considered to position Thailand port along western and eastern gateway while taken into account the rail link and highway for inland transportation.

Roles of Thai Ports and Terminals in Supporting Trade and Economic Growth

- Given that Thailand has its strategic location, locating at the center of ASEAN and locating in between China and India, Thailand is significantly impacted by the global trends. It could function as a gateway from to the East and to the West. With improved performance of Laem Chabang Seaport, together with investment in rail and other logistic systems along NS, EW, Southern and Eastern economic corridors taking Eastern Seaboard Economic Zone as given, Thailand is aimed to be developed as a logistic hub of the region.
- Along with measures to increase capacity and increase efficiency of the ESB, investment to improve the capacity and facilities services of Laem Chabang SP is key. Thailand is relatively well positioned to take advantage of globalization. The contribution of the port to economic development is not only to support Thailand's international trade but as well as being an important part of logistic supply chain which Thailand is aiming to participate and gain more benefit from the international trade in the region and from Thailand's connectivity gateway to the East and to the West.



Roles of Thai Ports and Terminals in Supporting Trade and Economic Growth

- Due to advancement of logistic technology, change in economic structure and so on , local benefits derived from ports need to be reviewed. The benefit of proximity to the port have declined over time, for example.
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Development Plan for Sea Transport under the 12th Plan—Thailand aims to boost further regional connection to stimulate its economy and to promote establishment of regional supply chain



1 Improve utilization of existing regional ports

- ✓ Port Authority of Thailand, local authorities, and relevant agencies will work together to improve management, marketing, demand development for seaports and inland ports to increase efficiency in utilization to improve sea transportation in Thailand.
- ✓ Creating sea transport network between key ports of Thailand and the ports in other countries.

2 Oversight of private sector who operates Laemchabang port

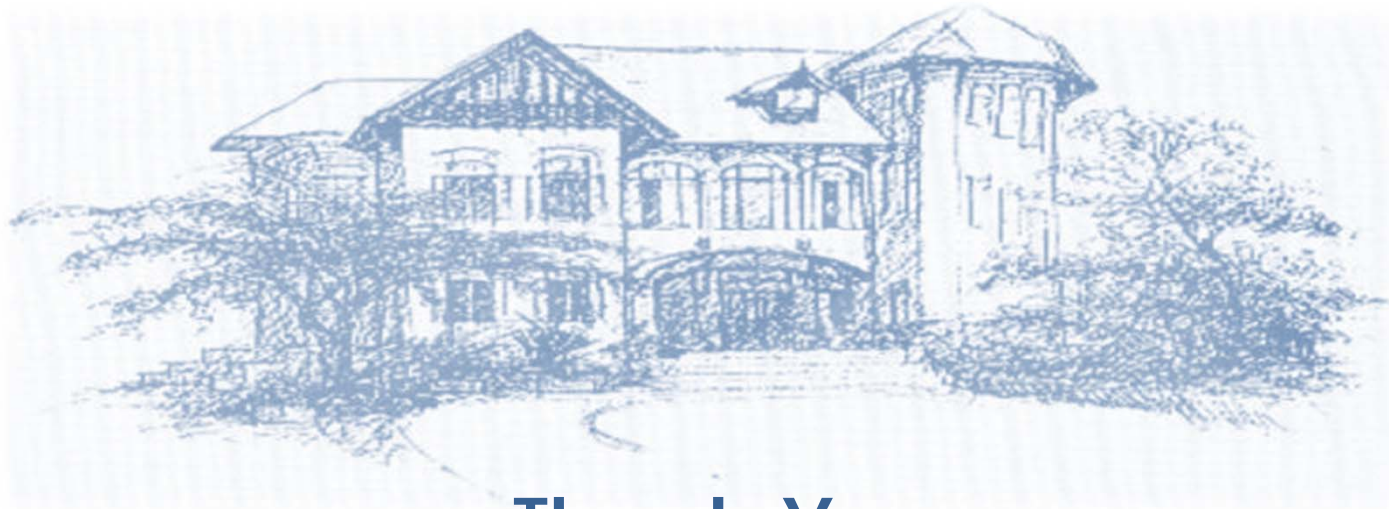
- ✓ Oversee the private sector who operates the port to ensure concession contract is fulfilled.
- ✓ Improve service standards of the port to be on par with leading ports in the region
- ✓ Prepare for capacity expansion of the port through a participatory process with local stakeholders.

Roles of Thai Ports and Terminals in Supporting Trade and Economic Growth

Expectations

- Improvement of Port Performance—capacity, convenience and efficiency
 - Improve port facilities
 - Improve skills of port labour
 - Improve master administration and planning under the Enterprise Master Plan
- Increase connectivity with other modes of transportation and other ports
- Expanding the network including industries and strategic partnerships with other ports such as China's ports and Korean's ports






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Capacity of Key Ports/Piers under Government Supervision

Port/Pier	Port capacity	Port Size (meter)			Type of Port/Cargo	Volume of goods/cargo
		Width	Length	Depth		
1. Laem Chabang port	80,000 DWT	N/A	300-700	14-16	General port and goods in cargo	73.5 mil. tons (2015) 6.8 mil. TEUs
2. Bangkok port	2 x 20,000 DWT	15	300	8.5	General port and goods in cargo	1 mil. tons (2015) 61,245 TEUs
3. Maptaphut port	100,000 DWT	N/A	85-1,354	8-12.5	General port and liquid goods	39.6 mil. tons (2014)
4. Songkhla deep seaport						
• Multipurpose port	2 x 20,000 DWT	30	180/175	9(MSL)	General cargo ships	2 mil. tons (2014)
• Cargo port	1 x 20,000 DWT	30	155	9(MSL)	Container cargo ships	151,551 TEUs
5. Phuket deep seaport	2 x 20,000 DWT	50	360	10(LLW.)	Port for goods	309,385 tons (2014)
6. Ranong deep seaport						
• Port 1	2 x 500 Gross ton	26	134	8 (MSL)	Multipurpose seaport	86,788 tons (2558)
• Port 2	1 x 12,000 DWT	30	150	8 (MSL)	Cargo port	967 TEUs
7. Tha Thong pier	1 x 1,000 Gross ton	14	193.6	5(LLW.)	Multipurpose pier (fishing boats, cargo ships and cruises)	1 mil. tons (2015)
8. Don Sak multipurpose seaport	1 x 500 Gross ton	10	370	7(LLW.)	Multipurpose seaport (Oil tankers and cruises)	N/A
9. Kan Tang pier						
• Port 1	1 x 1,000 Gross ton	24.5	144	5(LLW.)	Multipurpose pier (cargo ships and fishing boats)	Awaiting Operator
• Port 2	1 x 3,000 Gross ton	24.5	90	6(LLW.)	Cargo port	418,451 tons (2014)
• Port 3	1 x 3,000 Gross ton	24.5	90	6(LLW.)	Cargo port	12,157 TEUs


Source: Ministry of Transport
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Top 10 Exporters of Containerized Cargo- 2010, 2013 & 2014

RANK	EXPORTER	2010 TEUS (MILLIONS)	2013 TEUS (MILLIONS)	2014 TEUS (MILLIONS)
1	China	31.30	34.20	36.00
2	United States	11.20	11.50	11.90
3	South Korea	5.20	5.79	5.93
4	Japan	5.74	5.20	5.28
5	Indonesia	3.00	3.59	4.00
 6	Thailand	3.40	3.78	3.92
7	Germany	3.00	3.24	3.32
8	Taiwan, China	3.41	3.24	3.25
9	India	1.90	2.95	3.07
10	Vietnam	1.61	2.63	2.94

Source : World Shipping Council.

Top 10 Importers of Containerized Cargo- 2010, 2013 & 2014

RANK	IMPORTER	2010 TEUS (MILLIONS)	2013 TEUS (MILLIONS)	2014 TEUS (MILLIONS)
1	United States	17.60	18.40	19.60
2	China	12.00	14.40	14.70
3	Japan	6.10	6.34	6.55
4	South Korea	4.50	4.80	5.09
5	Indonesia	2.50	3.13	3.17
6	Germany	2.80	2.78	3.00
7	United Kingdom	2.50	2.42	2.64
8	Taiwan, China	2.50	2.42	2.53
9	Australia	1.80	2.45	2.52
10	Vietnam	2.00	2.19	2.47
11	India	2.00	2.21	2.39
 12	Thailand	2.00	2.32	2.35

Source : World Shipping Council.

Top 5 Export & Import Markets via Thai Seaport

Top 5 Export Markets via Thai Seaport

Rank	2012	2013	2014	2015	5M 2016
1	China	China	China	United States	United States
2	Japan	United States	United States	China	China
3	United States	Japan	Japan	Japan	Japan
4	Hong Kong	Hong Kong	Hong Kong	Hong Kong	Hong Kong
5	Indonesia	Singapore	Singapore	Australia	Australia



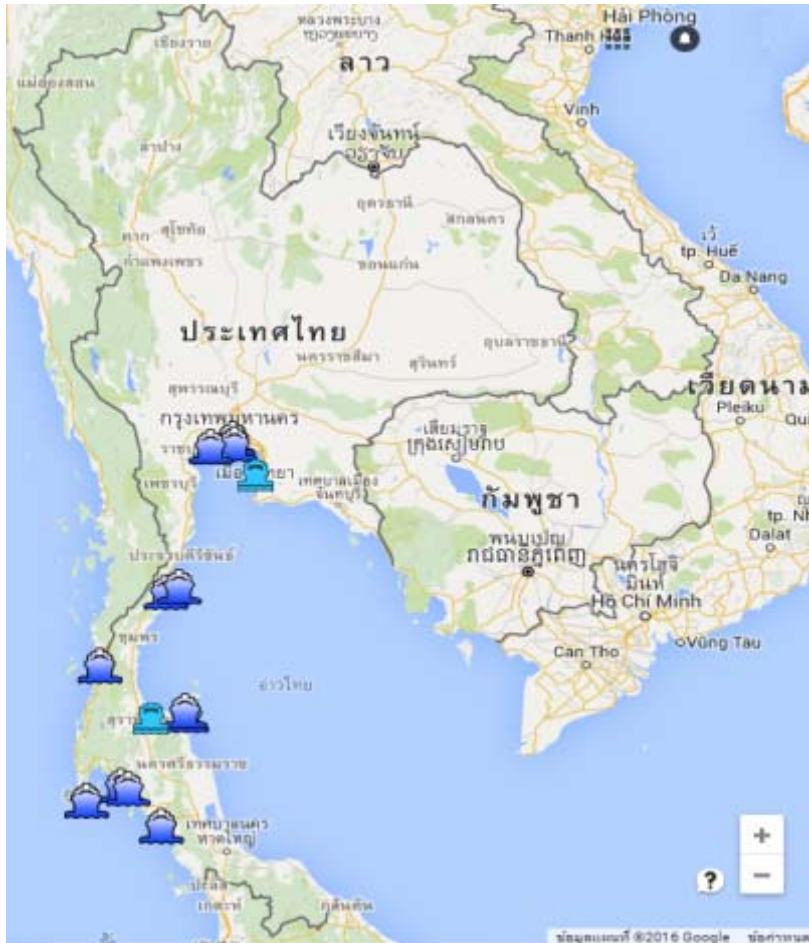
Top 5 Import Markets via Thai Seaport

Rank	2012	2013	2014	2015	5M 2016
1	Japan	Japan	China	China	China
2	China	China	Japan	Japan	Japan
3	UAE	UAE	United States	United States	UAE
4	United States	United States	UAE	UAE	Korea
5	Korea	Korea	Korea	Taiwan	Taiwan



Source : World Shipping Council.

International Sea Ports



9 Ports (both port under government supervision and private company) with high international shipment volumes include

1. **Laem Chabang port (Chonburi province)** is an original-destination port
2. **Bangkok port (Bangkok)** is a transshipment port
3. **BMT port (Samut Prakan province)**
4. **TPT port (Samut Prakan province)**
5. **UNITHAI port (Samut Prakan and Rayong province)**
6. **Sriracha harbor port (Chonburi province)**
7. **Kerry Siam Seaport (Chonburi province)**
8. **Maptaphut port (Rayong province)**
9. **Songkhla deep seaport (Songkhla province)**

Source: Transportation Institute Chulalongkorn University