

The background of the slide features a laboratory setting. In the upper right, four test tubes are arranged in a row, each containing a small green plant seedling growing out of a clear liquid. In the lower left, a round-bottom flask filled with blue liquid is visible, along with a petri dish. A molecular model with red, white, and blue spheres is also present in the background. A large, diagonal teal shape overlays the center of the image, containing the main title.

THAILAND'S BIOECONOMY INDUSTRY



Thailand Board of Investment
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INDUSTRY OVERVIEW

Over the past several decades, the concept of bioeconomy has increasingly captured the world's attention as an important means of supporting sustainable development and contributing to the global economy. In 2015, there are over 49 countries around the world planning to adopt or practicing biorelated policies¹ to transition from fossil fuels to a greener and cleaner biobased economy.

The OECD defines bioeconomy as the economic activities relating to the invention, development, production and use of biological products. This includes, but is not limited to the applications of biotechnology to agriculture, industry and health.

THAILAND'S BIOECONOMY INDUSTRY

The Royal Thai Government recognizes the importance of sustainable economic development. Various policies have been introduced to address technological, economic and institutional challenges to move the country towards a sustainable biobased economy.

2004-2021

Thailand's National Biotechnology Framework

The framework includes a policy of Green Innovations for Economic Security, Competitiveness and a Healthy Society and targets 4 critical sectors: Food and Agriculture, Medicine and Health, and Bioenergy and Biobased Industries.

2008-2015

National Bioplastic Roadmap

A national agenda to establish a complete supply chain for the bioplastic industry in Thailand. The policy focused on the development of R&D, supporting infrastructure and innovative businesses for bioplastics.

2012-2036

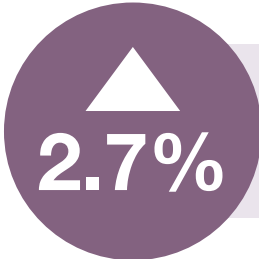
Alternative Energy Development Plan

This plan aims to cut the country's dependence on imported fossil fuels with domestically produced renewable energy.

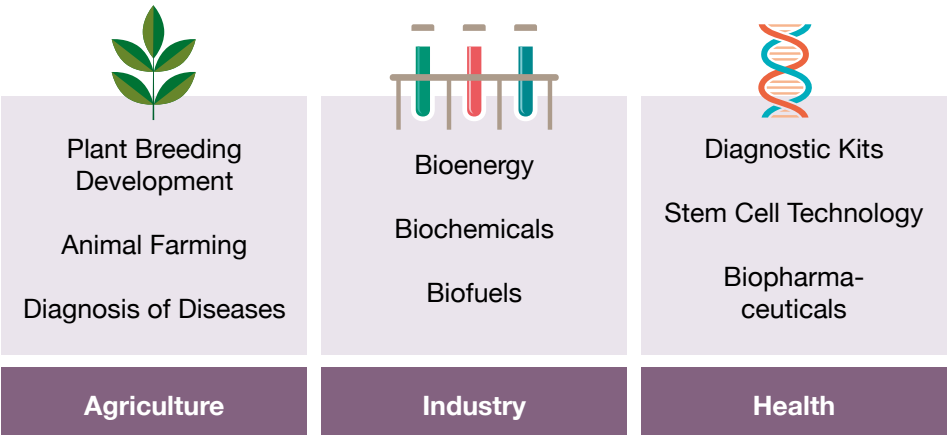
2015 - NOW

Thailand 4.0 and the New S-Curve

The new "Thailand 4.0" growth model focuses on the concept of inclusive, productive and green growth to enhance the country's competitiveness and economic development. Under the model, 10 industries are issued as the new economic growth engines of which the five new industries are Robotics, Medical Hub, Aviation and Logistics, Digital and Bioeconomy.



The bioeconomy is expected to play an increasing role in developing a greener economy and is estimated to contribute 2.7% to global GDP by 2030.²



Source:
^{1,2} The Organization for Economic Co-operation and Development (OECD)



Bioeconomy - a National Agenda

As one of the new economic growth engines, the Ministry of Industry gives a precedence to bioeconomy, utilizing Thailand's rich biodiversity and strong chemical manufacturing industry.

Moreover, the National Science Technology and Innovation Policy Office (STI) works together with the National Center for Genetic Engineering and Biotechnology (BIOTEC) to formulate the National Biotechnology Policy Framework 2012-2021. The policy framework's objectives are to develop strategic planning, establish future R&D, and enhance the country's ability to access new technologies and applications of biotechnology.

The framework includes 4 different sectors which are agriculture and food, medical and public health, bio energy, and bio industries.

Bioeconomy: 10-Year Goals¹

| Reduction in CO2 Emissions | Sugarcane Value Added |
|---|--|
|  |  |
| > 70 million tons | > US\$8.67 billion*/year |
| Increase in Income for Farmers | Cassava Value Added |
|  |  |
| Increase to US\$ 1,868 - 2,443*/year | > US\$2.89 billion*/year |
| Employment Rate | BioEnergy |
|  |  |
| <u>Sugarcane</u> >300,000 Households <u>Cassava</u> >500,000 Households | >30 million kilotons of oil equivalent (ktoe) (in 20 years) |

Source:
¹ The National Center for Genetic Engineering and Biotechnology (BIOTEC)
Note:
* Exchange Rate = THB 34.80/US\$ as of 1st September 2016

Bioindustries

Bioindustries are industries that are developed on the advancements of biotechnologies. The four major bioindustries are; bioenergy, biofuels, biochemicals and bioplastics.

BIOENERGY

Energy consumption in Thailand increased by about 4% since 2010*. Total energy expenditure in 2014 was US\$63.23 billion**, 2.6% higher than in 2013. The country is also heavily dependent on imported energy, with over 57% of energy purchased from overseas sources in 2014.¹ Reducing the country's dependence on foreign energy sources is one of the focuses of the government to strengthen economic stability. The country's first alternative energy plan was introduced in 2012 to address energy concerns through renewable alternatives and bioenergy.

Source:
¹ Energy Policy and Planning Office, Ministry of Energy

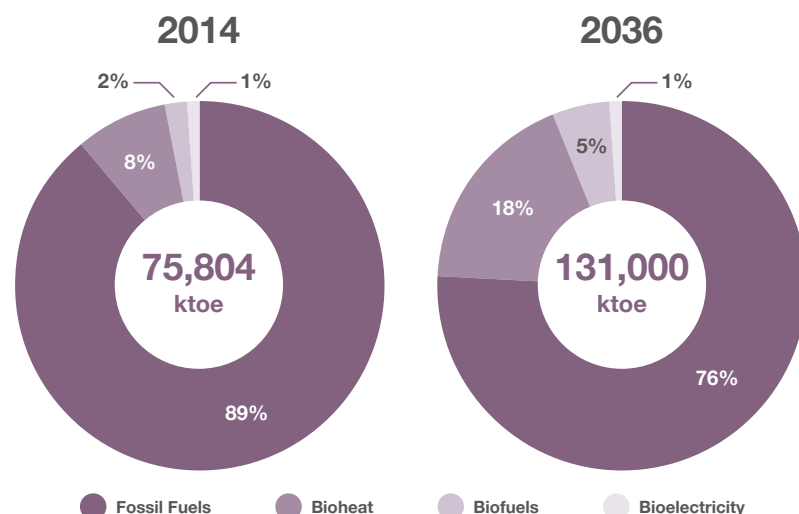
Note:
* Compound Annual Growth Rate (2010-2014)
** Exchange Rate = THB 34.80/US\$ as of 1st September 2016;

Bioenergy Consumption

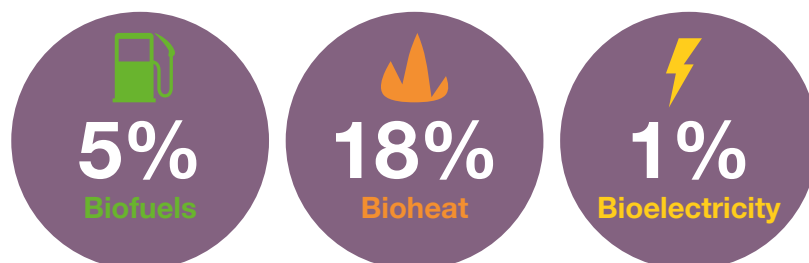
The Alternative Energy Development Plan (AEDP) 2015-2036 is the second phase of the country's long-term roadmap towards attaining a greener economy. The AEDP provides a blueprint and target for the government and related sectors to analyze, identify and replace fossil fuels with renewable energy. The target for bioenergy consumption is 24% of energy consumed domestically.¹



Bioenergy Domestic Consumption: 2014 & 2036F¹



AEDP 2015-2036 Targets



Thailand is the ASEAN leader in biofuels production with over 3.5 million liters of ethanol and 3.3 million liters of biodiesel produced daily.² In 2014, biobased energy already accounted for approximately 9% of total energy consumed in Thailand.³

Sources:

^{1, 3} Energy Policy and Planning Office, Ministry of Energy;

² Petroleum Institute of Thailand

Note: Biogas consumption is included in bioheat.

Successful Companies








Mitr Phol Group was initially established in 1956 in Ratchaburi province, Thailand. The company applies innovation and technology to develop its business from sugar to renewable energy, wood substitute materials, and Bio-based products under the concept of value creation. In present, the Group has expanded its business into the People's Republic of China, Lao People's Democratic Republic and Australia.



Patum Vegetable Oil (PVO) was established in 1975. The company has since become one of Thailand's leading palm and coconut refineries, offering a wide range of edible oils, food additives, biodiesel and refined glycerine products. After years of extensive R&D, the company entered the biodiesel sector in early 2006 and established its first biodiesel plant. PVO, together with Shell Thailand, also runs a joint project to provide financial and operational support for preparing palm oil crushing mills and smallholder farmers in the south of Thailand for the Roundtable on Sustainable Palm Oil (RSPO) certification and raising the Thai palm oil industry to global standards.

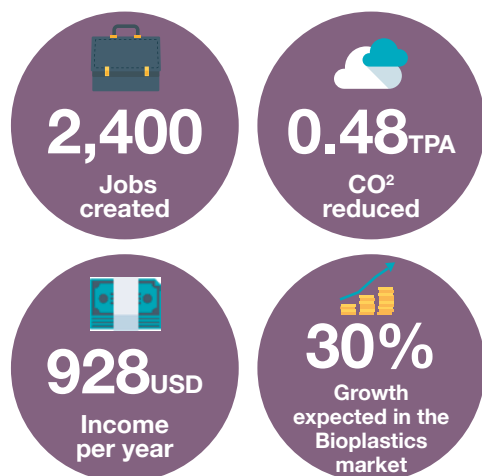
Other Key Players

| Company Name | | Main Products |
|---|--|--|
|  | Kaset Thai International Sugar Corporation | Sugar, molasses, pulp, bio fertilizer, ethanol, electricity, and agricultural machinery services |
|  | Thai Roong Ruang Sugar Group | Sugar |
|  | Energy Absolute | Biodiesel and glycerine through solar and wind power plant |
|  | Khon Kaen Sugar Industry | Sugar, ethanol, bio-fertilizer, and electricity |
|  | AI Energy | Premium gasoline, marine gas oil, automotive gas oil, kerosene, liquefied petroleum gas, and residual fuel oil |

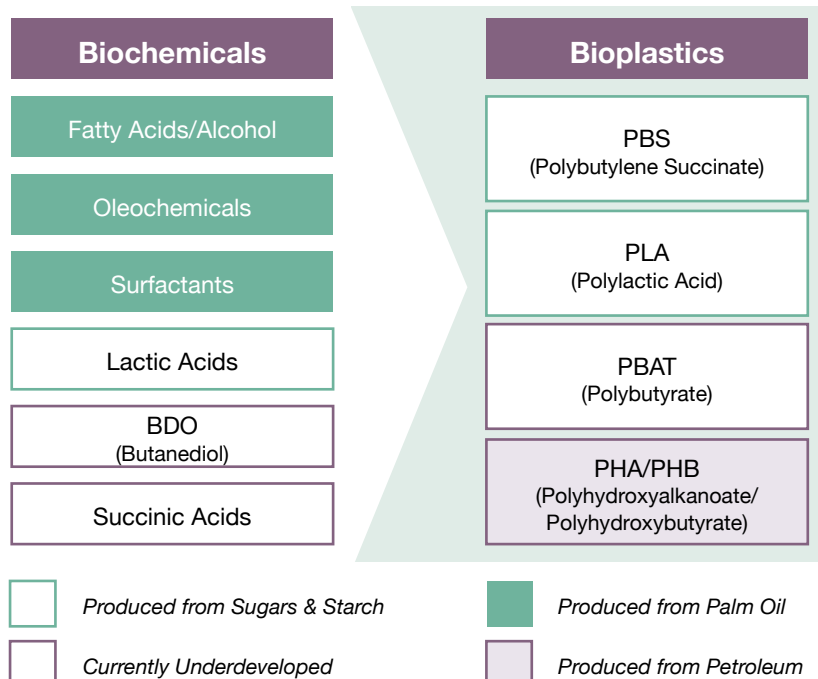
BIOCHEMICALS

Biochemistry covers a wide range of scientific disciplines, including genetics, microbiology, plant science and pharmaceuticals. Because of its comprehensive breadth, there is the continuous need for development and research for new applications and potential market opportunities.

Biochemical Industry Overview¹



Current Biochemical Production in Thailand



Source:
¹ Petroleum Institute of Thailand
 Note:

* Exchange Rate = THB 34.80/US\$ as of 1st September 2016

The Development of Bioplastics

As part of the Bioeconomy roadmap, the Thai government, in collaboration with major industry players PTTGC and Mitr Phol, aims to invest over US\$2.87 billion* to establish the country's first Biorefinery complex beginning in 2018.¹

The plant will increase Polybutylene succinate (PBS) productivity by five times and almost double Polylactic acid (PLA) production capacity.² It will also help the country to cut down its reliance on Biochemical commodities.

Proposed Biorefinery Complex: Production Capacity³

| | | | |
|--------------|-------------------------------|---|----------------------------------|
| Feedstock | Sugar Cane 1.1 million rai | Sugar Cane Mill 11 million tons/year | |
| Biochemicals | BDO** 100 kilotons/year | BSA*** 205 kilotons/year | Lactic Acid 330 kilotons/year |
| Bioplastics | PLA 250 kilotons/year | PBS 100 kilotons/year | |

The government also plans to help increase market demand of PLA in food packaging, especially in single-use packaging, functional film and frozen ready-meal packaging by 25% of current usage.⁴

PLA demand is expected to increase by roughly
25%

Source:

^{1,4} Public-Private Partnership

^{2,3} Petroleum Institute of Thailand

Note:

* Exchange Rate = THB 34.80/ US\$ as of 1st September 2016

** BDO = 1,4-Butanediol

*** BSA = Bovine serum albumin

Successful Companies



Corbion is the global leader in lactic acid, lactic acid derivatives and lactides. With its largest production plant based in Thailand, Corbion will be able to leverage the plentiful sugar resources available to become the largest PLA producer in the world. To accelerate its growth in the bioplastic arena, the company will invest over US\$100 million* in its new PLA polymerization and Lactide plants, which will open for operations in late 2018. The plant will increase global PLA production capacity by a further 75 kilo tons per annum.



Multibax is an award-winning, world-class plastics manufacturing company specializing in biodegradable plastic

bag production. Established in 1995, the company has expanded its operation to five factories with an annual production capacity of over 24,000 tons of plastic bags. Trusted by customers worldwide, the company's biodegradable plastic bag, MBIO-2, is certified by four international certification bodies; DIN CERTCO (Germany), VINCOTTE (Belgium), FSWA (Finland) and BPI (USA).

In 2016, Multibax established a co-research project with Burapha University, the Biodiversity-Based Economy Development Office (BEDO) and the National Research Council of Thailand (NRCT) to set up a pilot scale production for BioSuccinic acid, the starting material for PBS (BioPlastic resin) production.

Other Key Players



Manufactures and sells Oleochemical and Fatty Alcohol products, which are used for producing home and personal care



Provider of fatty alcohol ethoxylate, a key ingredient in the manufacture of various personal hygiene products



Produces methyl ester, which is used as an ingredient in biodiesel



Provider of starch derivatives, used as an ingredient in food, cosmetic, and pharmaceutical products



Provider of compostable bioplastic material with fast tracking solution for customer



Provider of bio-plastic resins and products



World-class provider of food additive, including food grade Citric Acid and Citrate



Provider of citric acid

Note: * Exchange Rate = Euro 0.89/US\$ as of 1st September 2016

BIOPHARMACEUTICAL

Thailand aims to become ASEAN's Biopharmaceuticals and Advanced Vaccine Hub by 2026¹ and join the US\$1 trillion global pharmaceuticals supply chain.²

Over 14.6 million patients across ASEAN and 98% of Thai patients are unable to afford imported medicines.³ To reduce their costs, Thailand aims to decrease its import dependency by 30% and increase its pharmaceutical export value to over 75,000 million Thai baht within the next 10 years.⁴

This US\$63.22 million industry*⁵ requires intensive R&D and technological investments to achieve its ambitious goals. This presents an enormous opportunity for foreign investors to explore the market and enjoy tremendous growth potential. Moreover, Thailand has developed several biotechnology programs, especially in alternative disease solutions, for many emerging and tropical diseases. Thailand has successfully developed number of vaccines, including tetanus, pertussis, and hepatitis B. The country is also one of the leading countries in stem cell research in Southeast Asia.

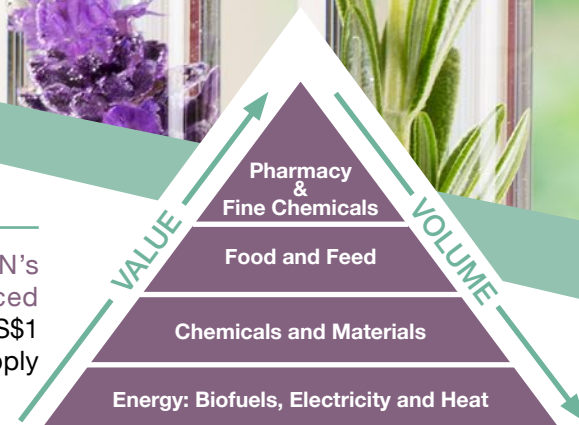
Source:

^{1,3} Council of University Presidents of Thailand (CUPT)

² Thomson Reuters

^{4,5} D5 working team under Thailand's Public-Private Partnership;

Note: * Exchange Rate = THB 34.8/ US\$ as of 1st September 2016



Research in Vaccine Development

With high-caliber researchers, vaccine developers and a vast amount of agencies working in the field of vaccine research and development, Thailand is now becoming the leader of vaccine development in ASEAN. Some successfully developed projects include 5-in-1 or 'cocktail' vaccine, H5N1 avian influenza vaccine, dengue vaccine.

► Dengue Vaccine

NSTDA researchers have also developed a dengue vaccine to address and prevent dengue fever, the disease of high fatality rate. The vaccine is aimed for use in indigenous population as well as populations along Thailand's border regions.

► 5-in-1 or 'Cocktail' Vaccine

Many vaccines have been developed by the Thailand's NSTDA in collaboration with BIONET Asia. For instance, the 5-in-1 or 'Cocktail' vaccine against 5 major infectious diseases, diphtheria, tetanus, pertussis, hepatitis B, and meningitis has been successfully developed and is expected to be released to the market in 2017.



► H5N1 Avian Influenza

As part of the National Flu Pandemic Preparedness Plan, the GPO H1N1 PLAIV vaccine approved by the Thai FDA in 2011, followed by the “FluVac” H5N2 and the IIV seasonal vaccines currently under clinical trials and an establishment of an industrial-scale influenza vaccine production plant in Saraburi province have clearly demonstrated the successful accomplishment of GPO in influenza vaccine production.

Natural Product Research in Thailand

► Functional Food

Thai scientists have begun investigating the subtle action of biologically active food components on human health. Additional research aims to validate the efficacy of these food components and establish appropriate dietary levels. Thai researchers have identified

functional food components that may improve memory, reduce arthritis, lessen

cardiovascular disease and provide other benefits typically associated with utilizing prescription drugs. Thailand is making a great deal of progress with respect to functional foods and molecular nutrition, both novel scientific paradigms that challenge traditional nutrition approaches.

Stem Cell Technology

Thailand is one of the leaders in stem cell research in Southeast Asia. Many well-known stem cell studies has been conducted by both public and private institutions. For instance, Chulalongkorn University successfully produced human embryonic stem cells, Police General Hospital developed adult stem cells to treat arthritis sufferers while Siriraj Hospital discovered a method to extract stem cells from human amniotic fluid. Thailand is also one of the leaders in stem-cell banking. Currently, there are five leading stem-cell banking companies in Thailand. In 2012, the country first embryonic stem-cell bank was established by Chulalongkorn University (supported by TCELS).

Successful Companies



BioNet-Asia is a leading vaccine company focusing on technological innovation and global market access. The company supplies more than billion doses of vaccines worldwide. At its cutting-edge plant in Thailand, BioNet is developing a unique expertise in genetic engineering, protein conjugation and vaccine formulation for various diseases, such as diphtheria, tetanus, pertussis, meningitis and hepatitis B.



Siam Bioscience is a life-science company focusing on R&D, manufacturing, and the commercialization of pharmaceutical and biopharmaceutical products. With over 1,600 sq.m. FDA GMP and PIC/S GMP standards compliance laboratory areas, the company is equipped with world-class researchers from all around the world. The company also joined forces with Mahidol University in developing and transferring advanced technologies. With many biopharmaceutical products under development, Erythropoietin Alfa and Filgrastim are currently the company's marketable products.

WHY INVEST IN THAILAND?

Abundant Resources and Biodiversity

Thailand's rich natural resources have solidified the country's reputation as the leading global supplier of agriculture products such as cassava, sugarcane and palm oil. These commodities, as well as their waste byproducts, can be utilized as biomass which is a critical source for biobased energy and other biobased products.



Thailand's Biodiversity at a Glance

Located in the heart of the ASEAN region and the Indo-Burma biodiversity hub, Thailand has one of the world's richest biodiversities with over 13,500 species of plants, 52% of which are endemic.¹



Indo-Burma region's No.1 largest plant biodiversity area



8 - 10% of the world's micro-organism species



8% The world's plant species (approximately 15,000 species)

Source:

¹ National Center for Genetic Engineering and Biotechnology

Note:

* Exchange Rate = THB 34.8/ US\$ as of 1st September 2016





Modern Farming

In addition to the tremendous biodiversity and plentiful biocrops, Thailand's expertise in plant breeding and agricultural improvements are the keys to its competitiveness. There currently are over 1,440 plant breeders and seed technologists.¹ Inspired to become ASEAN's seed hub, the government introduced numerous support and training initiatives to nurture the development of the agriculture sector.

The government, along with the private sector and research institutions, has already cooperated in improving agricultural production and efficiency by applying advanced technologies such as precision farming, SNP Genotyping and Tissue Culture technology. One of the noteworthy projects is the US\$2.30 million Mitr Phol – National Science and Technology Development Agency (NSTDA) joint research project on sugarcane breeding and development.²



In 2011, Mitr Phol's pilot modern farm was introduced in Suphan Buri province. The project now includes a sugarcane farm of over 1,000 rai in the central province of Thailand.

Source:

¹ Thailand Advanced Institute of Science and Technology

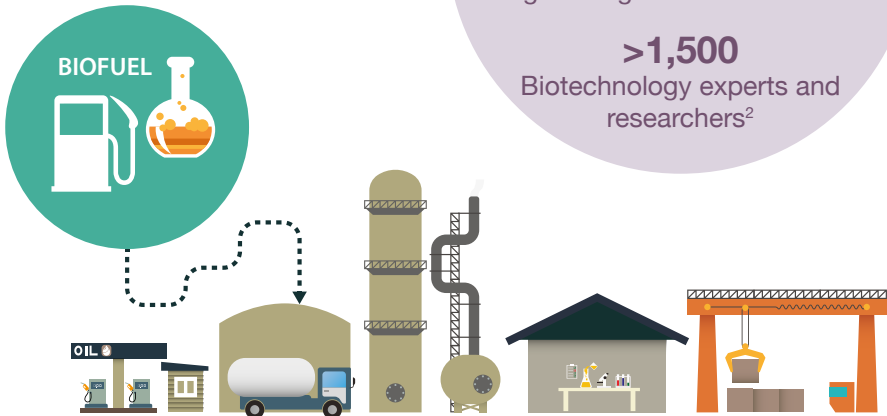
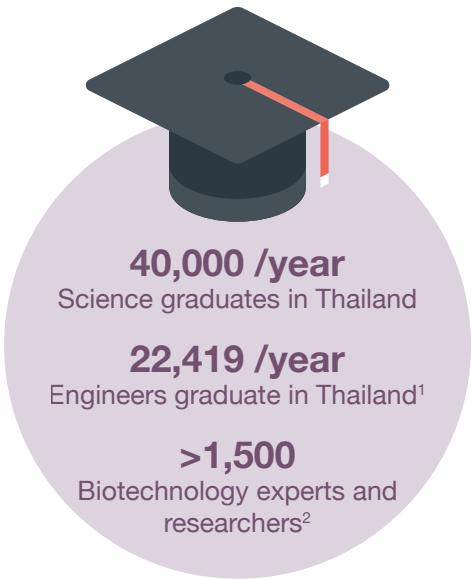
² National Center for Genetic Engineering and Biotechnology

Note:

* Exchange Rate = THB 34.8/ US\$
as of 1st September 2016

Skilled and Ready Workforce

Through government's generous support and strong cooperation between sectors, workforce development in Thailand has become the driving force for development of the bioeconomy sector. The current human development program aims to further grow the number of workers and experts, and to have at least 10,000 bioscience students.³



Strong Supply Chain

To establish a successful Bioeconomy supply chain, the government is committed to playing a vital role in directing the national agenda. The successful Eastern Seaboard

model will be used as a masterplan, focusing on R&D and collaboration among the different sectors, applying this experience to Bioeconomy, the country's next leading industry.

Source:

¹ Office of the Higher Education Commission

² The National Center for Genetic Engineering and Biotechnology (BIOTEC)

³ Thailand Advanced Institute of Science and Technology



SUPPORTING FACILITIES

To provide continuous support to the development of a well-qualified workforce, the Royal Thai government, in collaboration with educational institutions and the private sector is offering various resources for research and development, human resources training as well as dedicated biotechnology related faculties in over 22 leading academic institutions.



Research Centers

Biochemical Engineering and Pilot Plant Research and Development Laboratory

King Mongkut's University of Technology, Thonburi



MU-OU: CRC

Collaborative Research Center for Bioscience and Biotechnology
Faculty of Science, Mahidol University



Cassava and Starch Technology Research Laboratory

Kasetsart University



Marine Biotechnology Laboratory

Faculty of Science, Chulalongkorn University



Medical Biotechnology Research Laboratory

Faculty of Medicine, Siriraj Hospital



Associations and Institutions



Plastics Institute of Thailand

Promotes and enhances the Thai plastics industry's competencies through R&D and product testing services.



Department of Science Service

Provides professional R&D, product testing and HRD support through state-of-the-art technology.



National Science and Technology Development Agency

Supports R&D in 5 target areas, including agriculture and food, energy and environment, health and medicine, bioresources and community, and manufacturing and service industries



Thai Bioplastics Industry Association

Assists in the development of the Thai Bioplastics industry to reach international standards and promotes networking within the Bioplastics community.



National Innovation Agency

Supports R&D of innovative products and embeds the innovative strategic direction of firms.



Petroleum Institute of Thailand

Facilitates the Thai petroleum market and supports research, HRD and the development of the Thai petroleum and petrochemical industries.



The National Center for Genetic Engineering and Biotechnology

Supports R&D, policy research, and international relations in agricultural, biomedical and environmental sciences.



Thailand Institute of Scientific and Technological Research

Promotes and enhances innovations in science and technology R&D capabilities for commercialization and social benefits.



INVESTMENT INCENTIVES

BOI Incentives

BOI recognizes the importance and value of the bioeconomy 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

Bioenergy

| GROUP | ELIGIBLE ACTIVITIES | INCENTIVES | |
|-------|---|--------------------------------|---------------------------|
| | | Corporate income tax exemption | Exemption of import duty* |
| A1 | Production of electricity or electricity and steam from garbage or refuse derived fuel | 8 years (No Cap) | ✓ |
| A2 | 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 | 8 years | ✓ |

Biofuels

| GROUP | ELIGIBLE ACTIVITIES | INCENTIVES | |
|-------|--|--------------------------------|---------------------------|
| | | Corporate income tax exemption | Exemption of import duty* |
| A2 | <ul style="list-style-type: none">• Manufacture of fuel from agricultural products• Manufacture of fuel from agricultural scrap or garbage or waste | 8 years | ✓ |
| A3 | Manufacture of biomass briquettes and pellets | 5 years | ✓ |

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

Bioplastics

| GROUP | ELIGIBLE ACTIVITIES | INCENTIVES | |
|-------|---|--------------------------------|---------------------------|
| | | Corporate income tax exemption | Exemption of import duty* |
| A2 | <ul style="list-style-type: none">• Manufacture of eco-friendly chemicals or polymers or manufacture of products from eco-friendly chemicals or polymers that is incorporated within the same project as the manufacture of eco-friendly chemicals or polymers• Manufacture of specialty polymers or specialty chemicals | 8 years | ✓ |
| A3 | Manufacture of products from eco-friendly polymers | 5 years | ✓ |

Biotechnology Research and Development

| GROUP | ELIGIBLE ACTIVITIES | INCENTIVES | |
|-------|--|--------------------------------|---------------------------|
| | | Corporate income tax exemption | Exemption of import duty* |
| A1 | <ul style="list-style-type: none">• Research and development activity and/or manufacturing, using biotechnology of<ul style="list-style-type: none">• seed industry• improvement of plants• Animals• microorganisms using biotechnology• biopharmaceutical agents using biotechnology• diagnostic kits for health, agriculture, food and environment• biomolecules and bioactive substances using microorganisms, plant cells and animal cells• Manufacture of raw materials and/or essential materials for molecular biological research and development, experiments, testing or quality control services and/or production of biological substances• Biological substance analysis and/or synthesis services and/or quality control services and/or product validation services | 8 years (No Cap) | ✓ |

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



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