

ASEANのエネルギー分野の 現状・関連動向に係る調査 － 定点調査業務2025

報告書－タイ



新エネルギー・産業技術総合開発機構
New Energy and Industrial Technology Development Organization

ARTHUR LITTLE

調査項目

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- c. エネルギー政策に係る省庁および規制当局

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10. 電力需給状況

タイの一次エネルギー消費は2023年に石油41%と天然ガス25%が中心で全体の2/3超を占め、再エネは急増して22%に達している

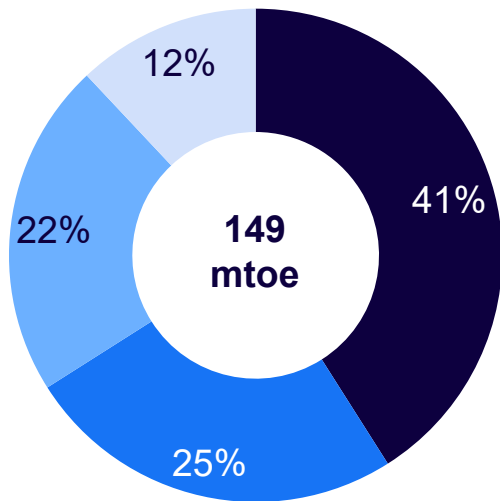
Primary energy consumption

2023, mtoe¹




Thailand's primary energy demand in 2023 is 149 mtoe, with oil and natural gas accounting for over 65% with oil at 61 mtoe (41%) and natural gas at 37 mtoe (25%). Renewable energy comes in third at 33 mtoe (22%), followed by coal at 13k mtoe (9%)

Oil Natural gas RE Coal



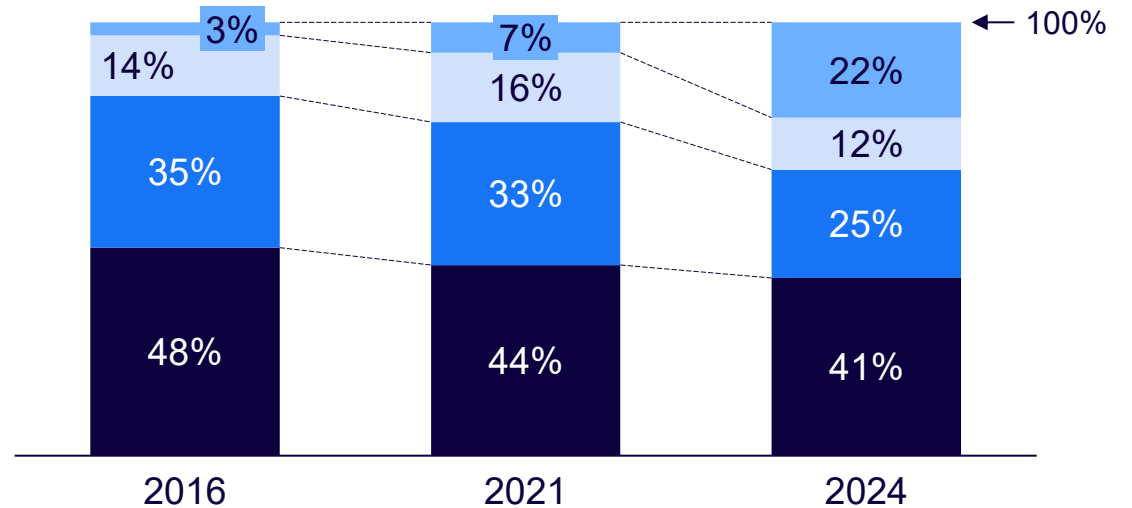
Historical primary energy consumption

2016–2024, %



Thailand has generally maintained a stable primary energy consumption mix with oil and natural gas share decreasing over the years but still making up >65% of energy consumption. Renewable energy is increasing rapidly in recent years as seen from the jump from 7% in 2021 to 22% in 2024.

Oil Natural gas Coal RE




Note: * Renewable energy consists of hydropower and other renewables, 1) Million tons of oil equivalent
Source: BP Statistical Review of World Energy 2017, 2022, EPPO, Arthur D. Little analysis

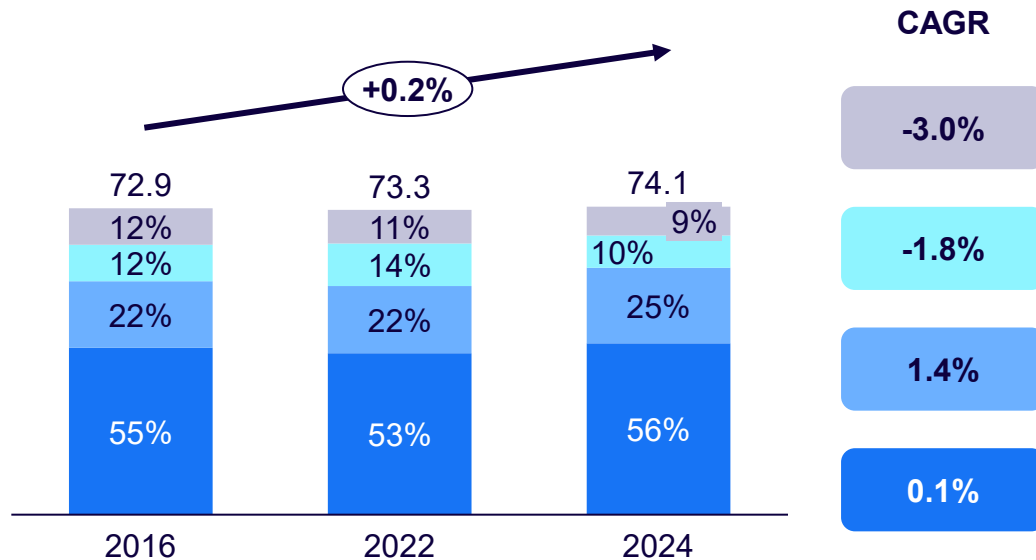
タイの最終エネルギー消費は2024年に石油56%と電力25%が大半を占め、部門別では輸送40%と産業35%で全体の3/4を占めている。

Final energy consumption

2016 - 2024, mtoe¹


 The final energy consumed in 2024 was 74.1 mtoe, experiencing 1.7% YOY growth from 72.9 mtoe in 2016. Oil has retained its dominance since 2016 (39.8 mtoe) and growing YOY at 3.5% to reach 41.2 mtoe in 2024. Electricity comes in second at 18.3 mtoe, trailed by natural gas at 7.7 mtoe and coal at 7.0 mtoe in 2024

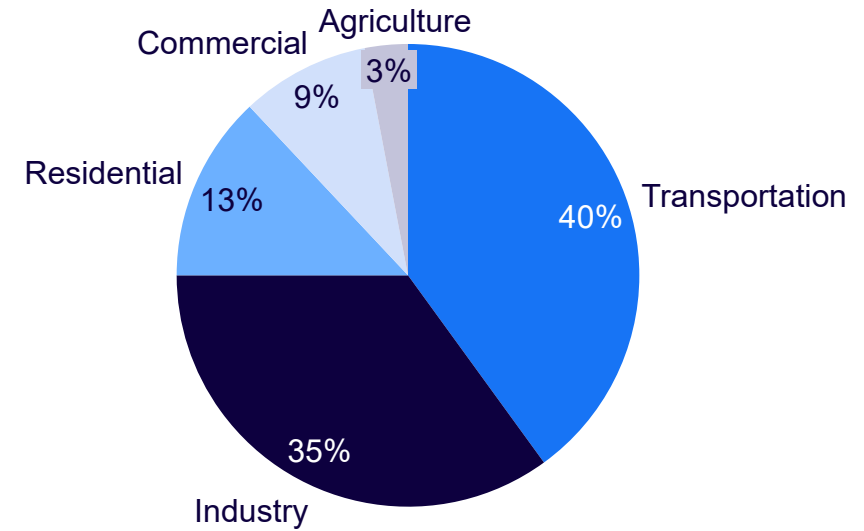
■ Coal ■ Natural Gas ■ Electricity ■ Oil



Final energy consumption, by sector²

2025, mtoe¹

 In 2022, the industrial sector accounted for a larger share, but more recently, the transport sector has become the largest. This may be due to the introduction of clean energy and the advancement of energy transition policies in the industrial sector, which are likely curbing the growth of its energy consumption.



Note: * Inclusive of lignite, preliminary data for all years, ** Inclusive of LPG (excluding petrochemical industry feedstock amounts), *** Including power generation from SPP; 1) Million tons of oil equivalent; 2) based on preliminary figures
Source: Energy Policy and Planning Office 2024, DEDE, Arthur D. Little analysis

新国家エネルギー計画（NEP）の策定作業が進展しており、2025年内に公表される予定。新計画は現行計画と比較して再生可能エネルギー比率の拡大などを含む内容となる見込み

	Current version (2018)	Upcoming version (2025)*
National Energy Plan (NEP)	<ul style="list-style-type: none"> Combine and synchronize the five action plans (below) Provide the development policy direction in the energy sector for both government agencies and private companies 	
Power development plan (PDP)	<ul style="list-style-type: none"> Aims to increase generating capacity from 46,090 megawatts to 77,211 megawatts by 2037 This will be accomplished mainly through power plant construction and power purchases from IPPs 	<ul style="list-style-type: none"> Aims to increase generating capacity from 46,090 megawatts to 112,391 megawatts by 2037 Achieve over 50% clean energy, reduce natural gas from 60% to 41%, and introduce nuclear power at 1% by 2037.
Alternative Energy Development Plan (AEDP)	<ul style="list-style-type: none"> Increase the proportion of renewable and alternative energy to 30% in the year 2037 Solar is expected to deliver ~9,290 MW, with ~1,933 MW developed through community-based power plants 	<ul style="list-style-type: none"> Increase the proportion of renewable and alternative energy to 36% in the year 2037 Encourage development of new renewable and alternative energy such as hydrogen and SAF
Gas Plan	<ul style="list-style-type: none"> Promotes the use of natural gas as an alternative to coal and other relatively more polluting fossil fuels Aims to further the development of domestic natural gas production and infrastructure (e.g., LNG) 	<ul style="list-style-type: none"> Increase maximum gas conversion from 19 Mn tons/yr. to 29.8 Mn tons/yr. in the year 2027 Aims to further the development of domestic natural gas production and infrastructure (e.g., LNG)
Oil Plan	<ul style="list-style-type: none"> Promote the use of biofuel, restructure fuel prices, and support measures to achieve fuel savings across all sectors 	<ul style="list-style-type: none"> Explore Strategic Petroleum Reserve (SPR) that is suitable for Thailand, improve methodology for determining oil reserve rates, increase oil pipeline utilization and invest in new business
Energy Efficiency Plan (EEP)	<ul style="list-style-type: none"> Sets a target for energy intensity (EI) reduction of 30% by 2037 (against 2010 baseline) Research and utilization of disruptive technology to enhance energy conservation (e.g., smart grids) 	<ul style="list-style-type: none"> Sets a target for energy intensity (EI) reduction of 36% by 2037 (against 2010 baseline) Encourage participation in energy conservation in every sector

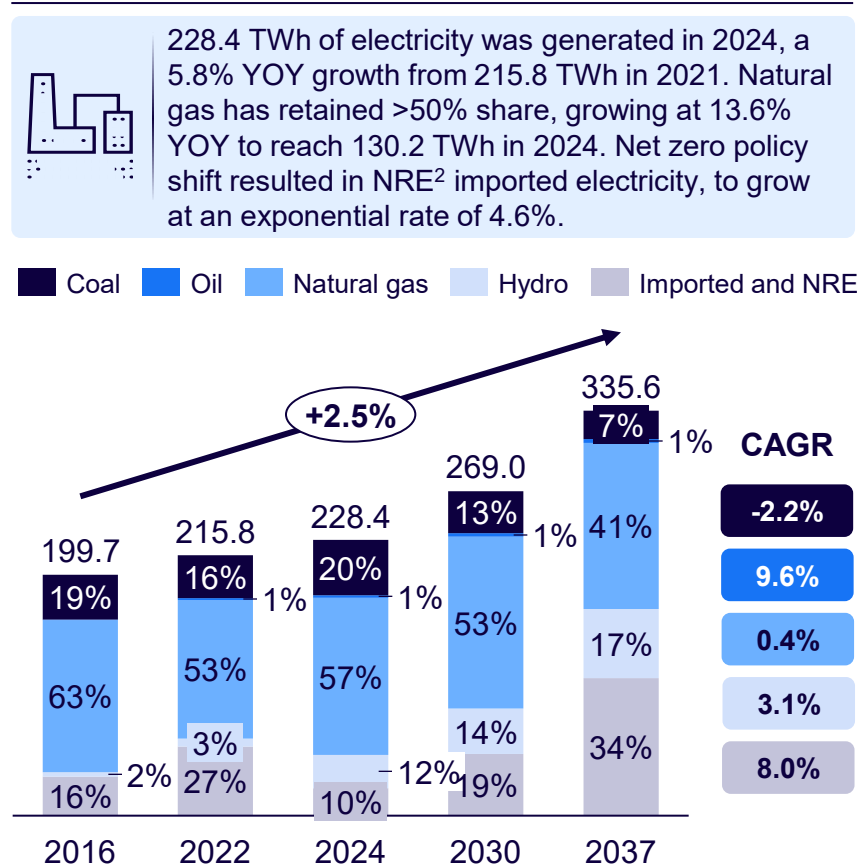
Note: *Planned to be released in September 2025

Source: International Trade Administration 2022, Various government sources 2021

天然ガスは130 TWhで発電エネルギー源の約50%を占めており、2037年までこのシェアを維持

Electricity generation mix

2024, TWh¹



Electricity mix forecast

2023 – 2037, %

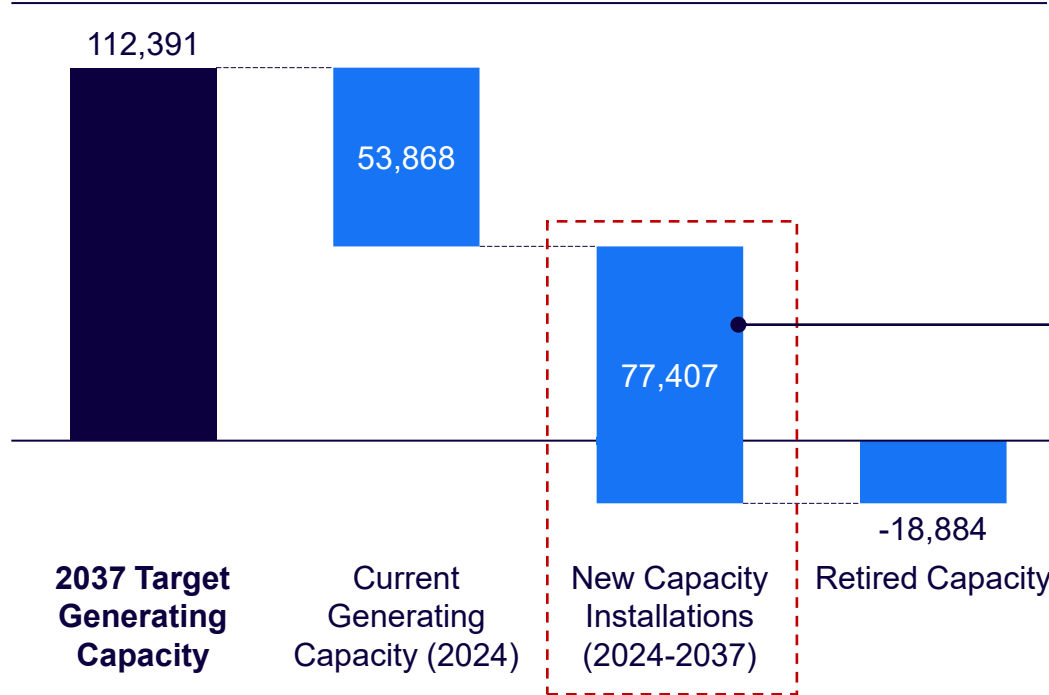
#	Fuel Type	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037
1	Hydro	12.8	12.6	12.0	13.8	13.9	14.0	14.0	15.4	15.6	15.6	16.9	17.0	16.6	17.1	17.0
2	Natural gas & LNG	55.4	56.5	56.1	55.3	53.0	54.0	52.6	51.4	51.8	50.0	48.1	46.7	43.9	41.8	41.9
3	Fuel oil	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Stove oil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Diesel	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	Coal	18.5	19.8	19.0	17.9	18.1	16.2	14.3	13.9	12.0	11.2	8.7	8.1	8.1	7.5	7.2
	Lignite	10.9	12.4	11.2	11.3	12.2	9.5	8.4	9.4	7.7	6.4	5.4	4.7	4.7	4.6	3.7
	Imported	7.6	7.4	7.7	6.6	5.8	6.7	5.9	4.5	4.3	4.7	3.3	3.4	3.4	2.9	3.6
5	NRE ²	13.2	11.1	12.9	13.1	15.1	15.8	19.1	19.2	20.6	23.2	26.4	28.1	31.4	33.6	35.2
6	Imported electricity ³	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	Energy efficiency ⁴	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.9	2.1	3.6	4.7	5.6

Note: 1) Terawatt per hour; 2) New and renewable energy; 3) Via transmission line link from Malaysia; 4) Electricity savings as a result of energy efficient technologies
 Source: Power Development Plan 2024 (Draft), Arthur D. Little analysis

電源開発計画では、2037年までに発電能力を77,407メガワットまで増加させることを目指しており、うち再生可能エネルギーが5割弱を占める

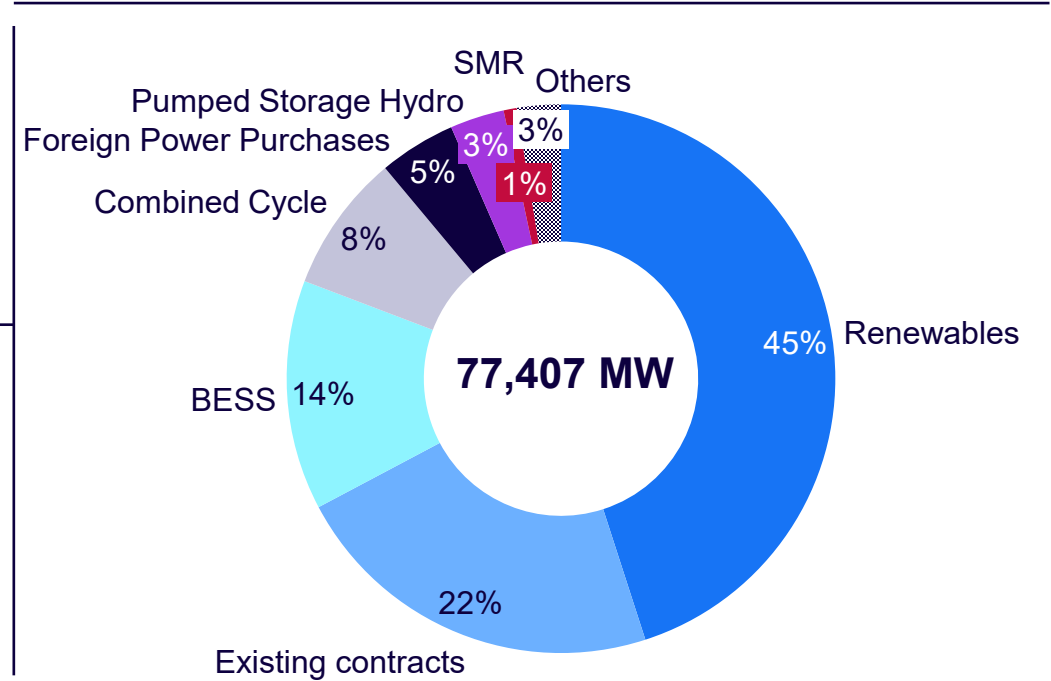
Electricity generating capacity targets

Between 2024-2037, MW



Breakdown of new capacity installations

Between 2024-2037, MW



New capacity installations in Thailand between 2024 and 2037 are targeted to be **renewables-focused**, most notably solar energy which is expected to account for more than 50% contribution of renewables. Additionally, PDP 2025 prioritizes the role of energy storage systems (e.g., BESS¹) mirroring global trends

Note: 1) Battery Energy Storage System
Source: Power Development Plan 2024 (Draft 5)

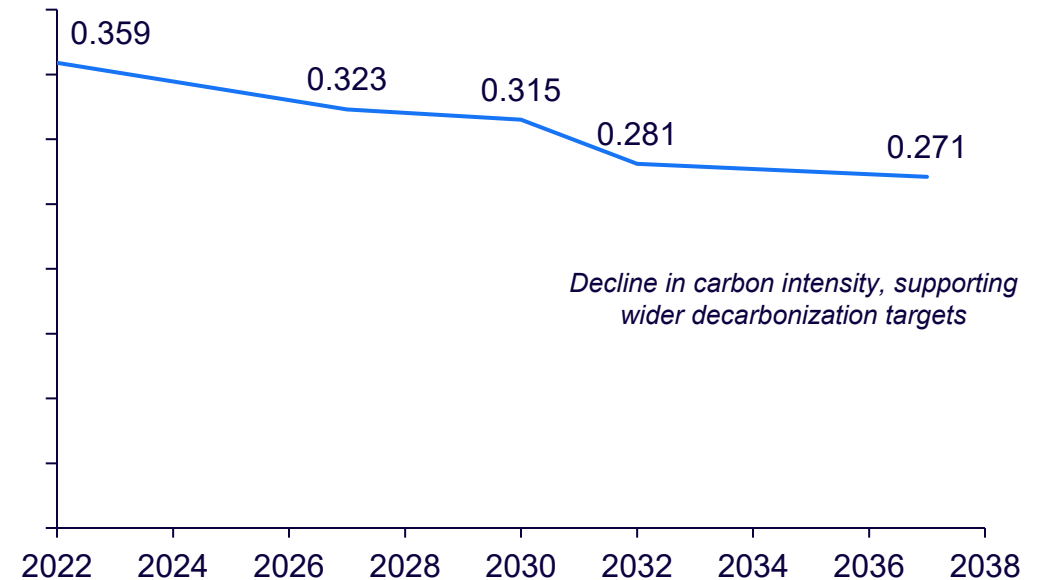
電源開発計画ではエネルギー安全保障の強化、安価・安定したエネルギー供給による経済発展の促進、サステナビリティの促進を目的としたエネルギーインフラ整備を計画

Planned enhancements to transmission infrastructure

NON-EXHAUSTIVE

Region	Details	Purpose
Eastern	<ul style="list-style-type: none"> Station construction and additional 500 kV and 230 kV transmission lines 	Enhance energy security and support economic growth
Western and Southern	<ul style="list-style-type: none"> Constructing a 500 kV transmission line and improving the 230 kV transmission system Covering long-term power supply to the south, up to Phuket 	
Central	<ul style="list-style-type: none"> Additional construction of 500 kV and 230 kV transmission systems Supporting the ASEAN Power Grid system 	

Targeted carbon intensity of power generation kgCO₂/kWh*



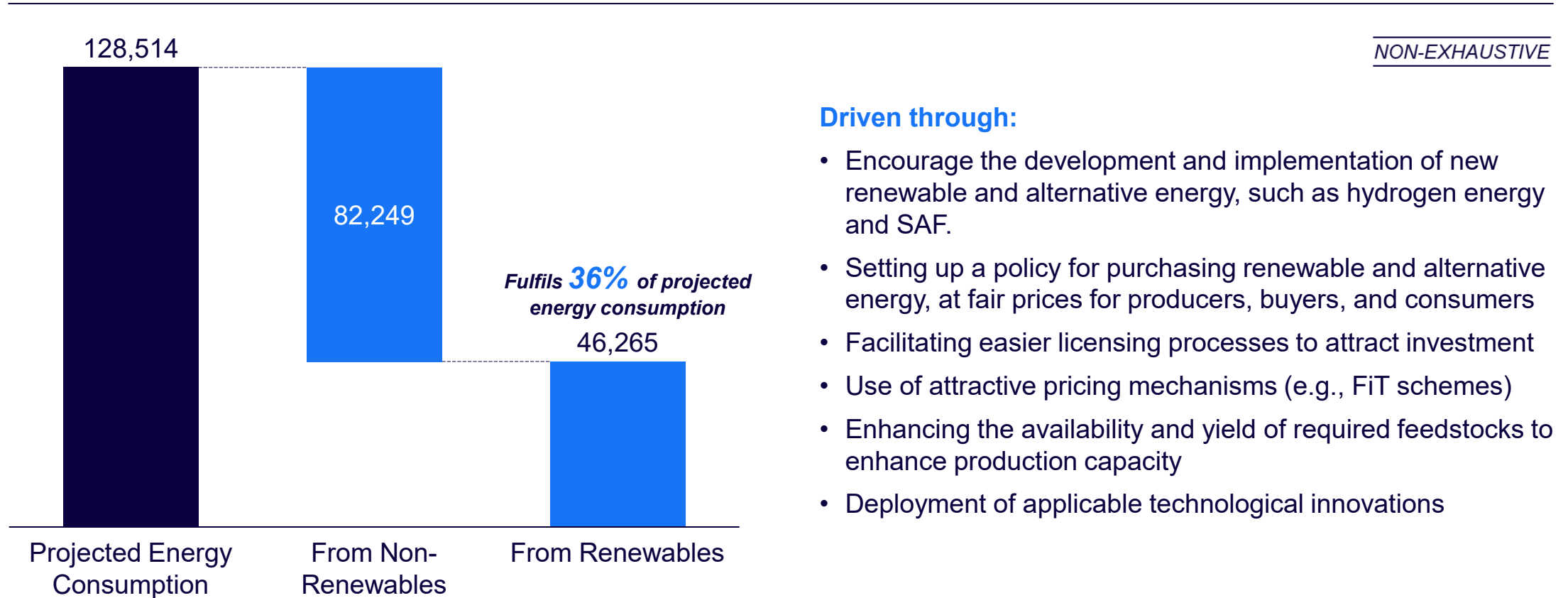
Thailand’s Power Development Plan 2024 emphasizes **security** (ensuring stability of electricity system), **economy** (achieving reasonable and stable electricity prices), **sustainability** (increasing proportion of renewable energy share)

Note: * Per kilo of CO₂ released per kilowatt per hour
Source: Power Development Plan 2024 (Draft 5)

代替エネルギー開発計画2024は、2037年までに再生可能エネルギーと代替エネルギーの割合を総消費量の36%まで引き上げる

AEDP - Projected energy consumption and production

2037, ktoe¹



Note: 1) Kilo tons of oil equivalent

Source: Alternative Energy Development Plan 2024 (draft), Arthur D. Little analysis

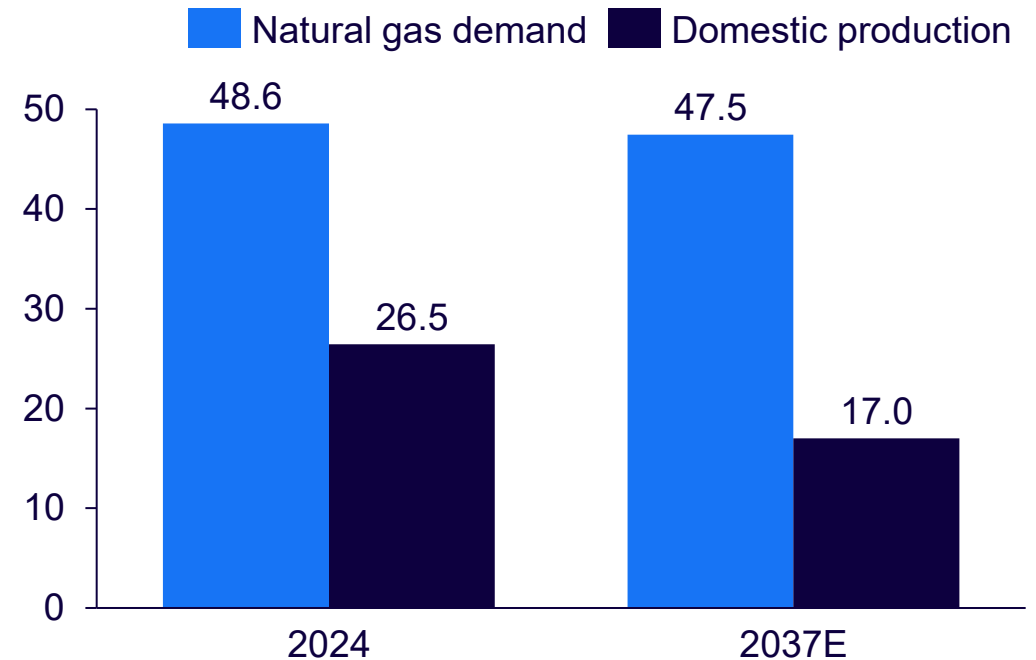
前計画に比べ、ガス需要は縮小する見通し。国内のガス田は枯渇が進み、生産量は減少するため、ミャンマーなど周辺国からの調達を進める計画

Gas Plan 2024 (Draft)

Goals	<ul style="list-style-type: none"> • Provide sufficient natural gas • Develop the natural gas infrastructure system to be stable and effective • Encourage competition in the natural gas business • Facilitate Thailand to be a Regional LNG Hub
Plan	<ul style="list-style-type: none"> • Reduce natural gas demand until 2037 • Procurement of Potential Gas Resources in the Gulf of Thailand and Myanmar • Maximum Gas Conversion : current 19 Million tons per year to 29.8 Million tons per year in 2037 • Investment in Infrastructure LNG Terminal 3

Forecasted natural gas demand and production

bcm/year*



Gas demand during 2024–2037 is expected to decline compared to previous estimates. In terms of supply, increase in sourcing from Gulf of Thailand and Myanmar and a reduction in LNG imports are expected

Note: * Billion cubic metres per year
 Source: Thailand Gas Plan 2024 (draft), Arthur D. Little analysis

Oil Planでは、戦略石油備蓄の可能性を調査し、パイプライン利用効率を改善するとともに代替燃料としてのバイオ燃料や水素などの活用についても言及

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Oil Plan 2024 (Draft)

Targets	Four Pillars of the initiatives
<ul style="list-style-type: none"> Reduce the use of gasoline across all sectors from 13,012 ktoe BAU in 2036 to 4,600 ktoe¹ 	<ul style="list-style-type: none"> Oil security <ul style="list-style-type: none"> Research feasibility of a Strategic Petroleum Reserve (SPR) and appropriate operating model for Thailand Improve fuel reserves estimation methodology Develop fuel contingency plans in preparation for energy shortages
<ul style="list-style-type: none"> Reduce the use of diesel across all sectors from 32,389 ktoe BAU in 2036 to 18,147 ktoe¹ 	<ul style="list-style-type: none"> Transport fuels <ul style="list-style-type: none"> Reduce diesel and benzene fuel types Adjust blending rates for biodiesels as appropriate Facilitate conversion of public transport to EVs Support hydrogen usage in large commercial vehicles
	<ul style="list-style-type: none"> Infrastructure <ul style="list-style-type: none"> Maximize oil pipeline efficiency and explore feasibility of pipeline expansion Promote refined oil exports Support installation of charging stations at gas stations
	<ul style="list-style-type: none"> New business <ul style="list-style-type: none"> Invest THB 113,901 Mn in development of new businesses: Petrochemicals and bioplastics (56,726 Mn), SAF and BHD (56,775 Mn), Bio-based transformer oil (400 Mn)

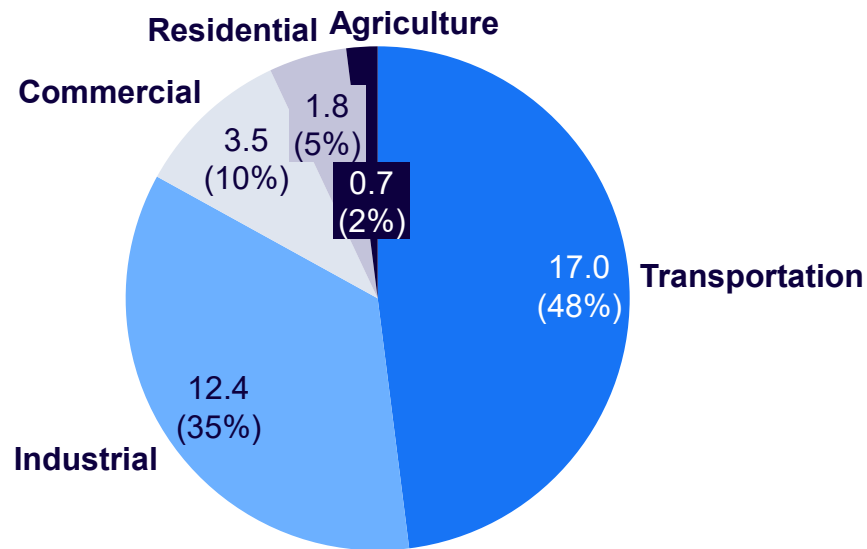
In addition to emissions reductions, Thailand’s Oil Plan seeks to generate 71 Bn THB income for biofuel producers, 41.5 Bn THB for renewable energy crop farmers, and invest 113,901 Mn THB in developing new businesses

Note: Relates to the initiatives of Thailand’s Energy Efficiency Plan
Source: Thailand Oil Plan 2024 (draft)

「エネルギー効率計画2022 (EEP 2022) は、2010年水準と比較して、2037年までにエネルギー消費を36% (約5,230万トン石油換算) 削減することを目指している NON-EXHAUSTIVE

Total Energy Conservation Targets by Sectors¹

Unit: Mtoe (million tons of oil equivalent)



Selected Enabling Mechanisms

Regulations and Code

- Building energy codes, mandatory energy management for designed facilities, transport compliance

Standards and Labelling

- MEPS and “Label No. 5” to life appliance / equipment efficiency

Fiscal and Financial

- CO2-based vehicles excise; rebates/soft loans/accelerated depreciation for EE

Program and Operations

- Utility Energy Efficiency Resources Standard (EERS), demand response/time-of-use, industrial audits & process optimization

Tech Enablers & Others

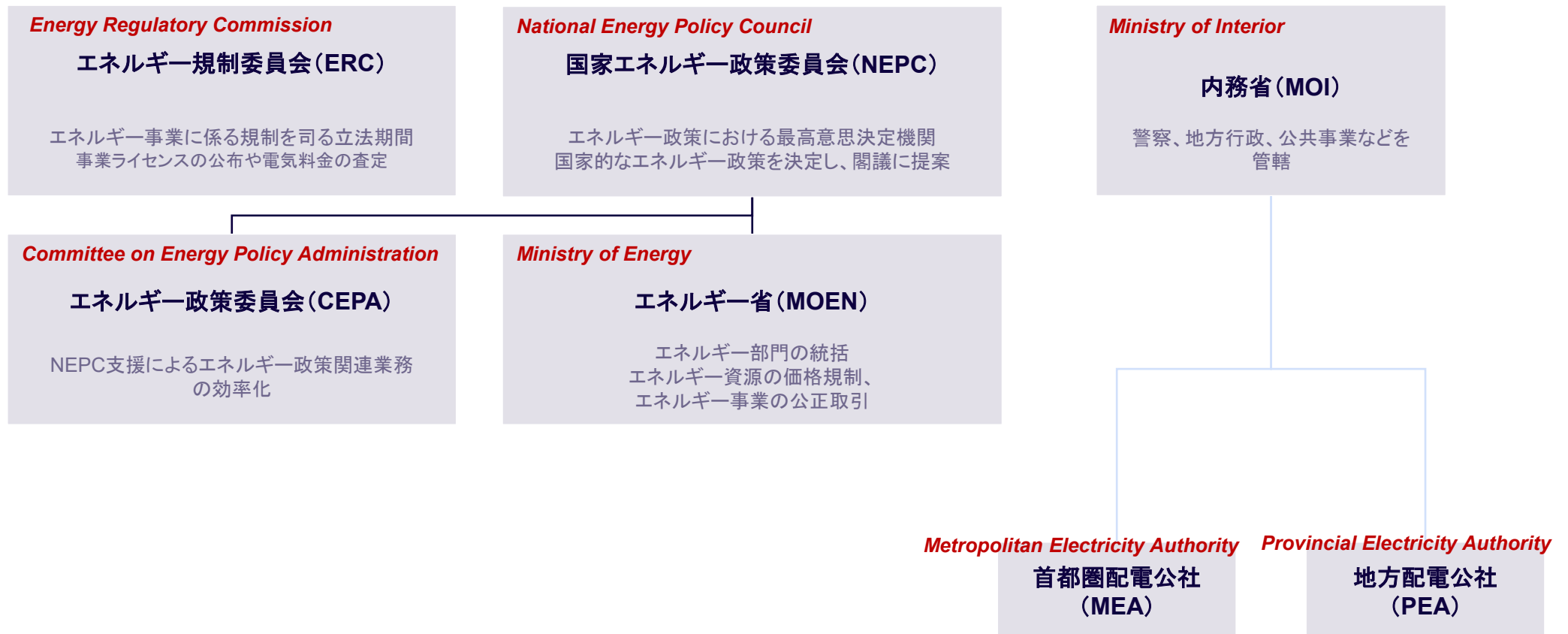
- Smart IoT/AI controls, training/awareness, R&D/pilots

Transportation and industrial are primary focuses of Thailand’s energy conservation efforts.

Note: (1) As indicated by the draft Energy Efficiency Plan 2022 (EEP 2022)
Source: Energy Efficiency Plan 2018, Arthur D. Little Analysis

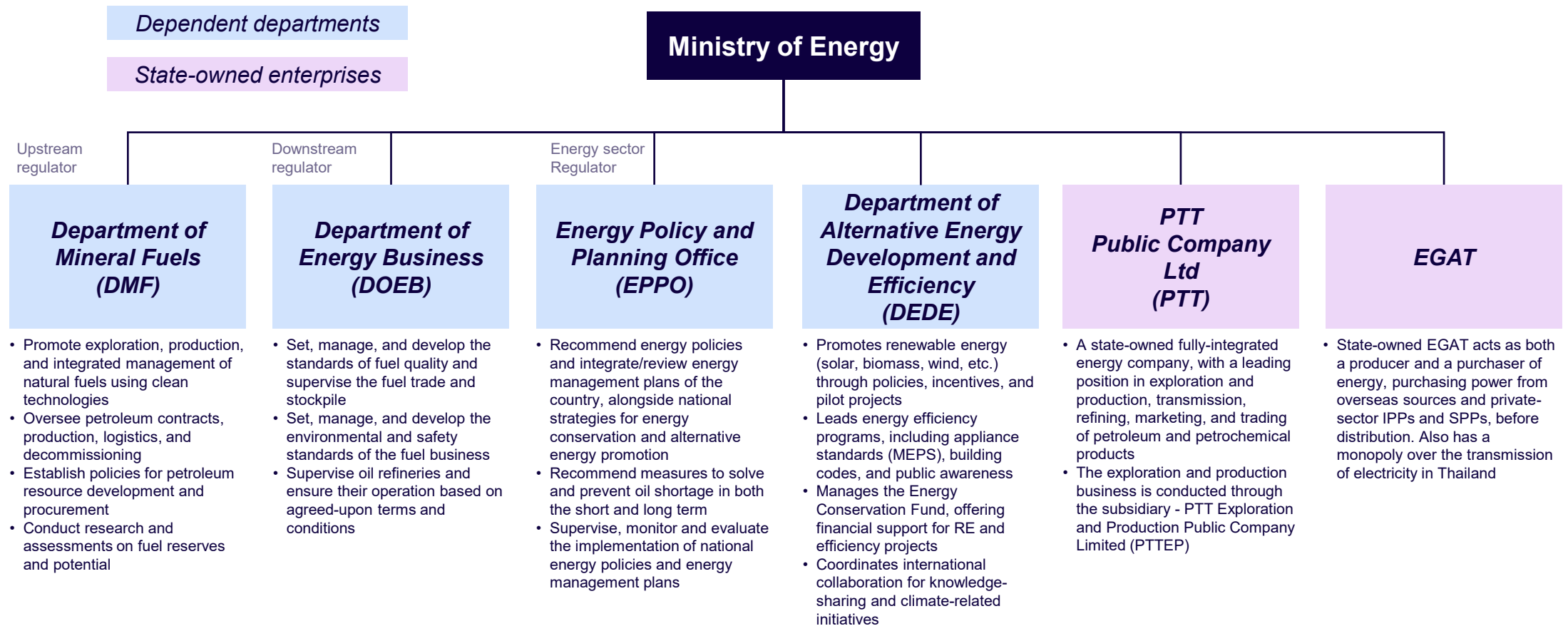
エネルギー政策全体を統括するNEPCの下で、電力セクターを管轄するMOEN、政策を立案するEPPCが存在。また独立規制当局としてERCが存在する。

エネルギー関連組織と役割



MOENにおいてDMFが上流側を管轄し、DOEBが下流側を統括。EPPOはエネルギーセクター全体を統括し、国営会社PTTをマネジメントしている


The supervising Government ministries and departments




エネルギー規制委員会（ERC）は、発電・送電・配電に関するライセンス規制や電力取引ルールを定め、消費者保護や電力供給の安定を担う独立機関

NON-EXHAUSTIVE

Mandate of the Energy Regulatory Commission



คณะกรรมการกำกับกิจการพลังงาน
Energy Regulatory Commission



สำนักงานคณะกรรมการ
กำกับกิจการพลังงาน

Energy Regulatory Commission

established in 2008 by the Energy Industry Act, B.E. 2550 (2007)

➤

Category	Details
Consumer protection	<ul style="list-style-type: none"> Regulated primarily through the Power Development Fund (PDF). The PDF is funded by mandatory contributions of licensees operating in the energy industry, such as IPPs¹ and SPPs² Disbursements from the PDF can occur when there is a natural disaster, or when electricity generators or distributors overcharge
Setting of licensing requirements for generation	<ul style="list-style-type: none"> An electricity generation license must be obtained for an electricity generation plant to operate. This must be obtained from the ERC if the plant has a total capacity of 1,000 kW or more Most generation plants must also obtain a factory operation license from the ERC, except rooftop solar photovoltaic installations up to 1,000 kW, wind farms, and hydropower
Electricity supply and transmission	<ul style="list-style-type: none"> Electricity Generating Authority of Thailand (EGAT) is the single buyer of bulk electricity, under ERC-set regulations. Electricity is then sold to: <ul style="list-style-type: none"> The Metropolitan Electricity Authority, for the Bangkok metropolitan area and the provinces of Nonthaburi and Samut Prakan The Provincial Electricity Authority, for the remaining provinces Various direct consumers and neighboring countries

Note: 1) Independent power producers; 2) Small power producers

Source: Thailand Ministry of Energy 2023, Thomson Reuters Practical Law 2020, Arthur D. Little analysis

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7. 電力品質

8. 送電網

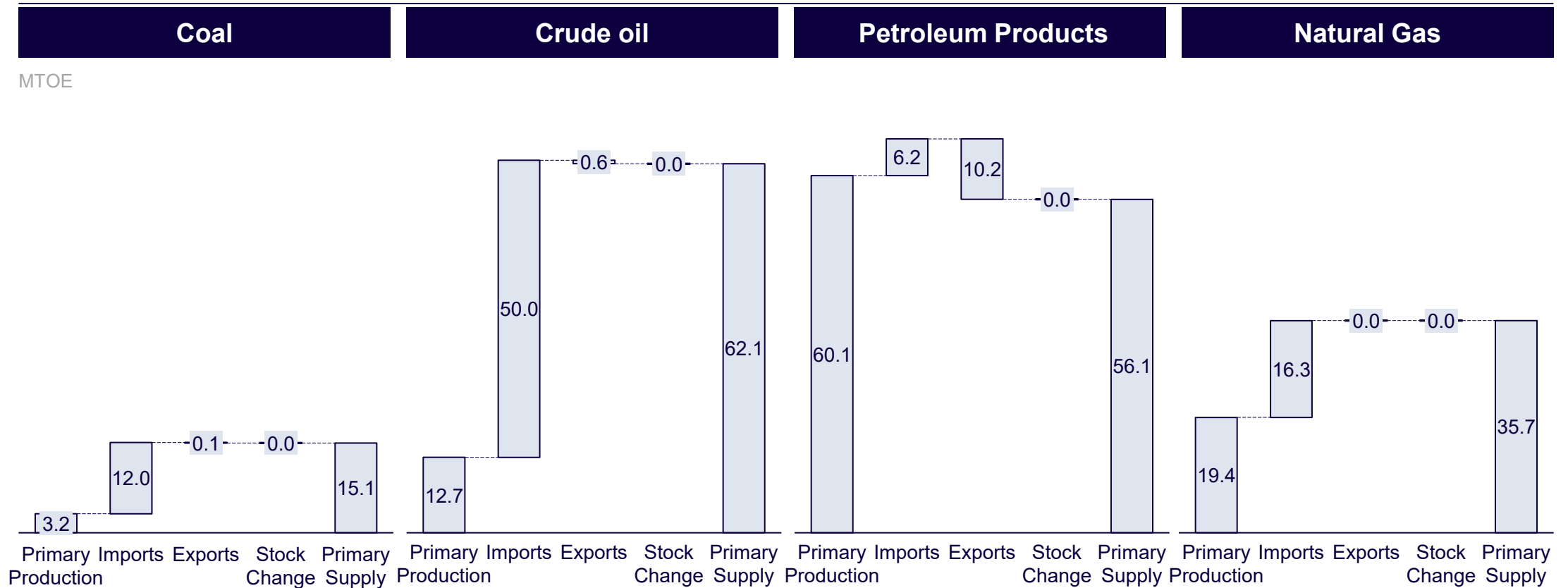
9. 電気料金

10. 電力需給状況

石炭、石油に加え近年では天然ガスまで、多くの資源を輸入している現状

Rate of domestic production and import/export of fossil fuel energy

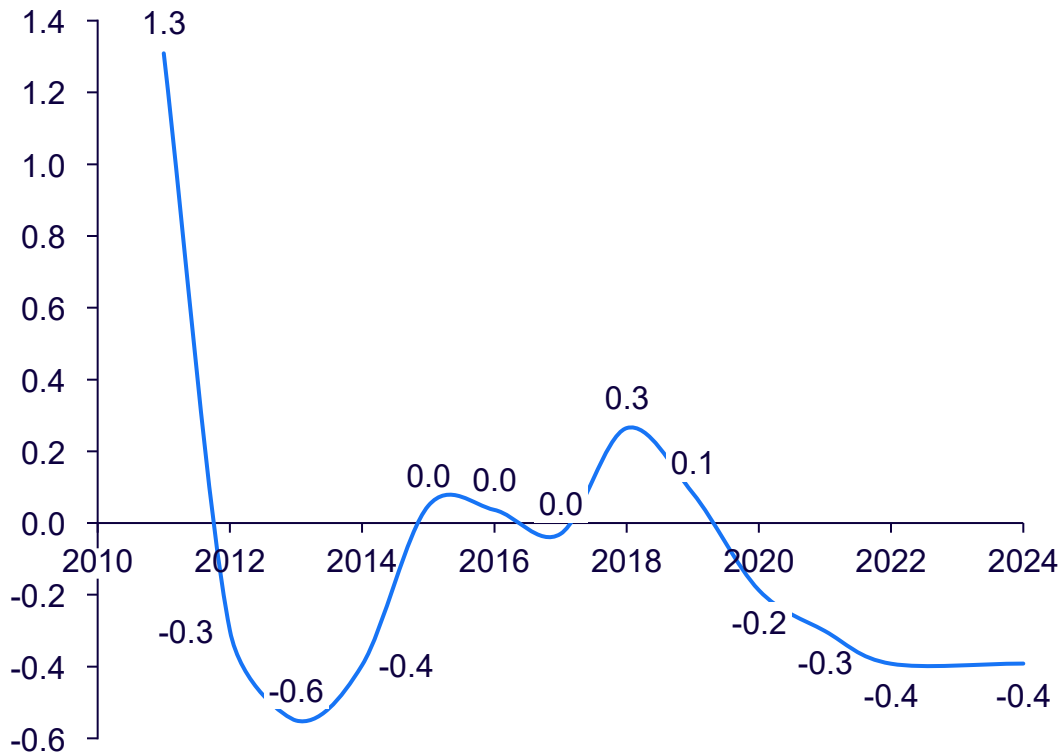
2023



タイの石炭使用量は減少傾向にあり、国内生産は縮小する一方で消費量の多くを輸入に依存している

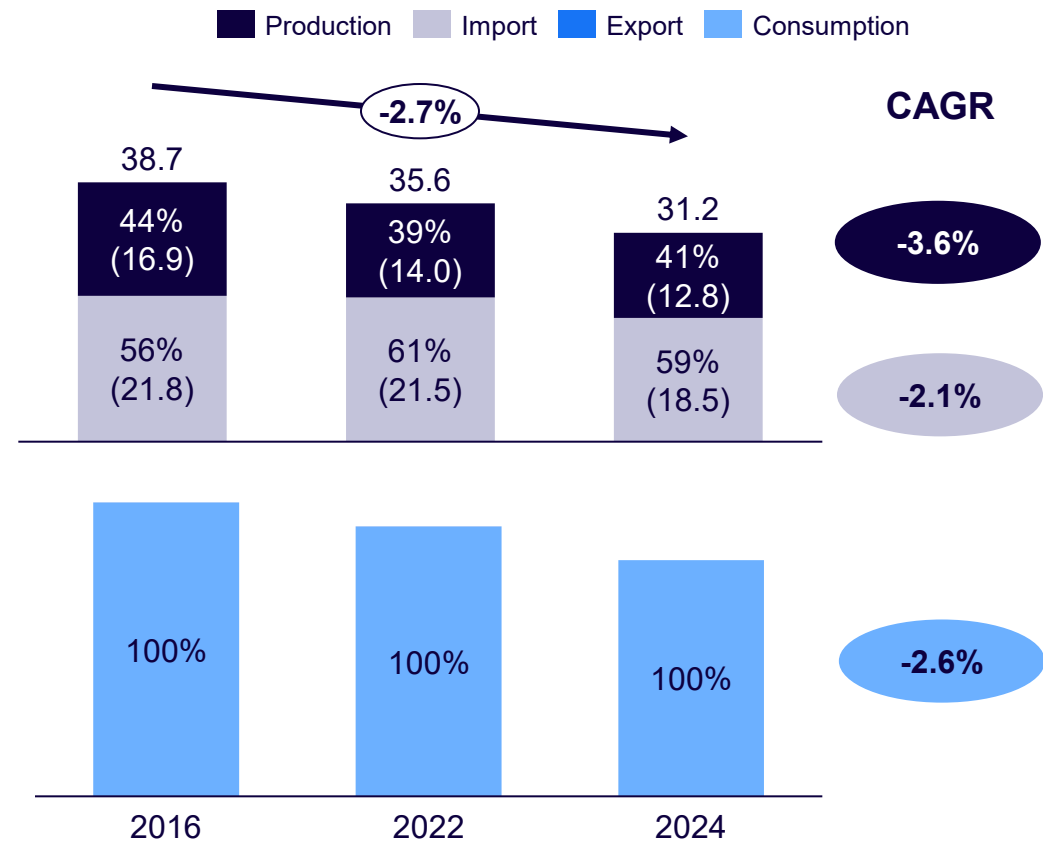
Lignite coal net export trend

2011 – 2024, Mt²



Coal key trends¹

2016 – 2024, Mt²

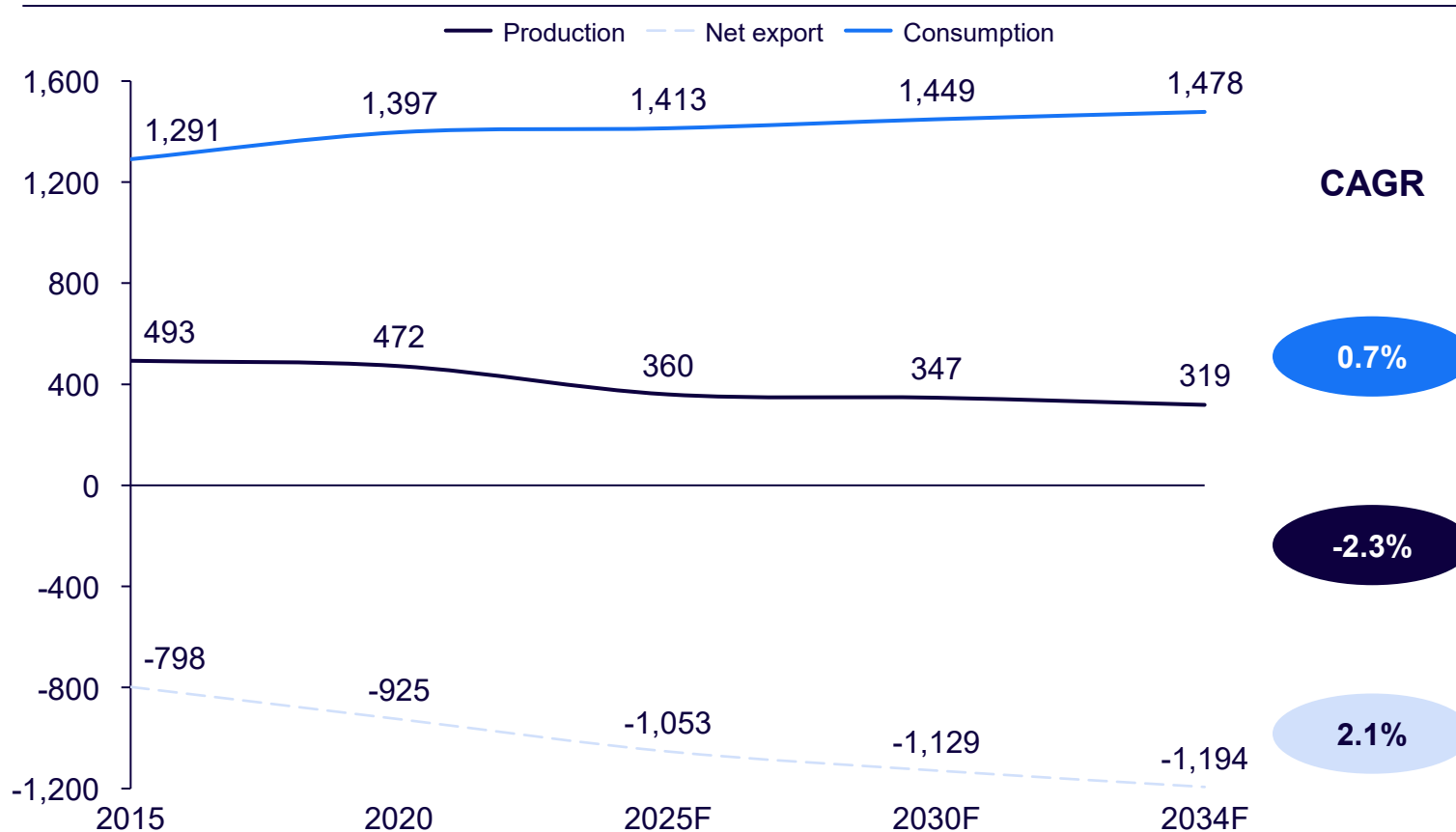


Note: 1) For the period 2011 – 2024 coal exports are minimal and inclusive of lignite exports; 2) Million tons
 Source: Energy Policy and Planning Office 2024, Arthur D. Little analysis

タイでは石油備蓄の枯渇と消費増加が重なり、国内生産は減少傾向にある一方で需要は拡大しているため、輸入依存が一層高まると予想されている

Crude oil, NGPL & other liquids key trends

2015 – 2034, 000's bpd*



COMMENTS

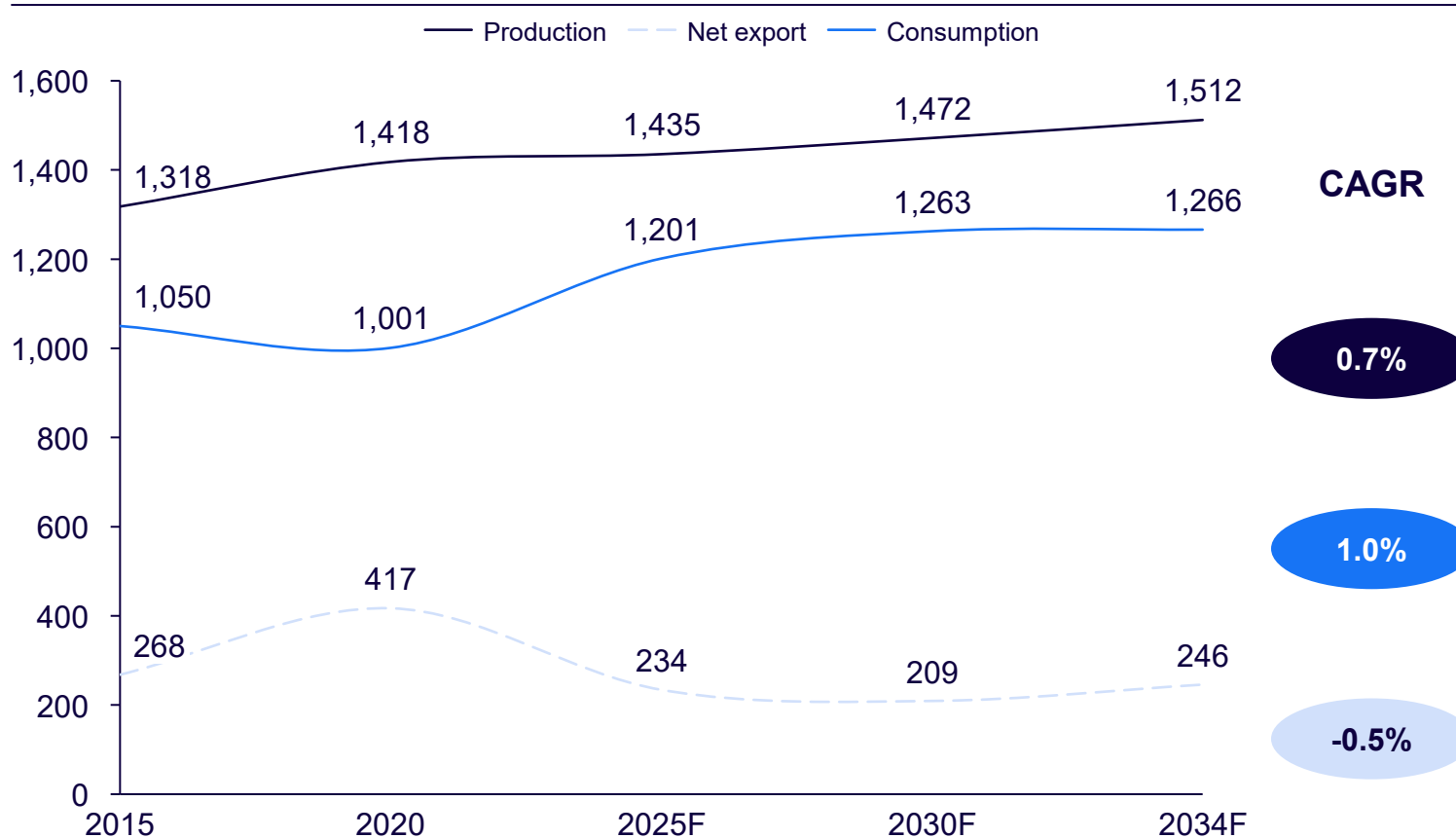
- Crude oil production from majority of fields declined between January and May 2025, undermining production growth prospects
 - Producing oil fields including Tantawan, Sirikit, Jusmin, Manora, Songkla, Bualuang and Nasanun fields are facing structural decline, putting downward pressures on overall crude oil production
- Thailand faces structural decline in crude oil and condensate production as producing fields are maturing. Slowdown in exploration efforts due to tightening environment regulations and lengthy approval time resulted in fewer oil discoveries and adversely affected reserves additions

Note: The negative net export refers to import greater than export; * Barrels per day
 Source: Fitch Solutions 2025, International Energy Agency 2023, Lexology 2023, Arthur D. Little analysis

製油所の生産量が拡大したことで国内消費の増加に対応可能となり、輸入依存度が低下するとともに、余剰分はアジア太平洋地域を中心に輸出が拡大すると見込まれている

Refined petroleum products key trends

2015 – 2034, 000's bpd*



CAGR

0.7%

1.0%

-0.5%

COMMENTS



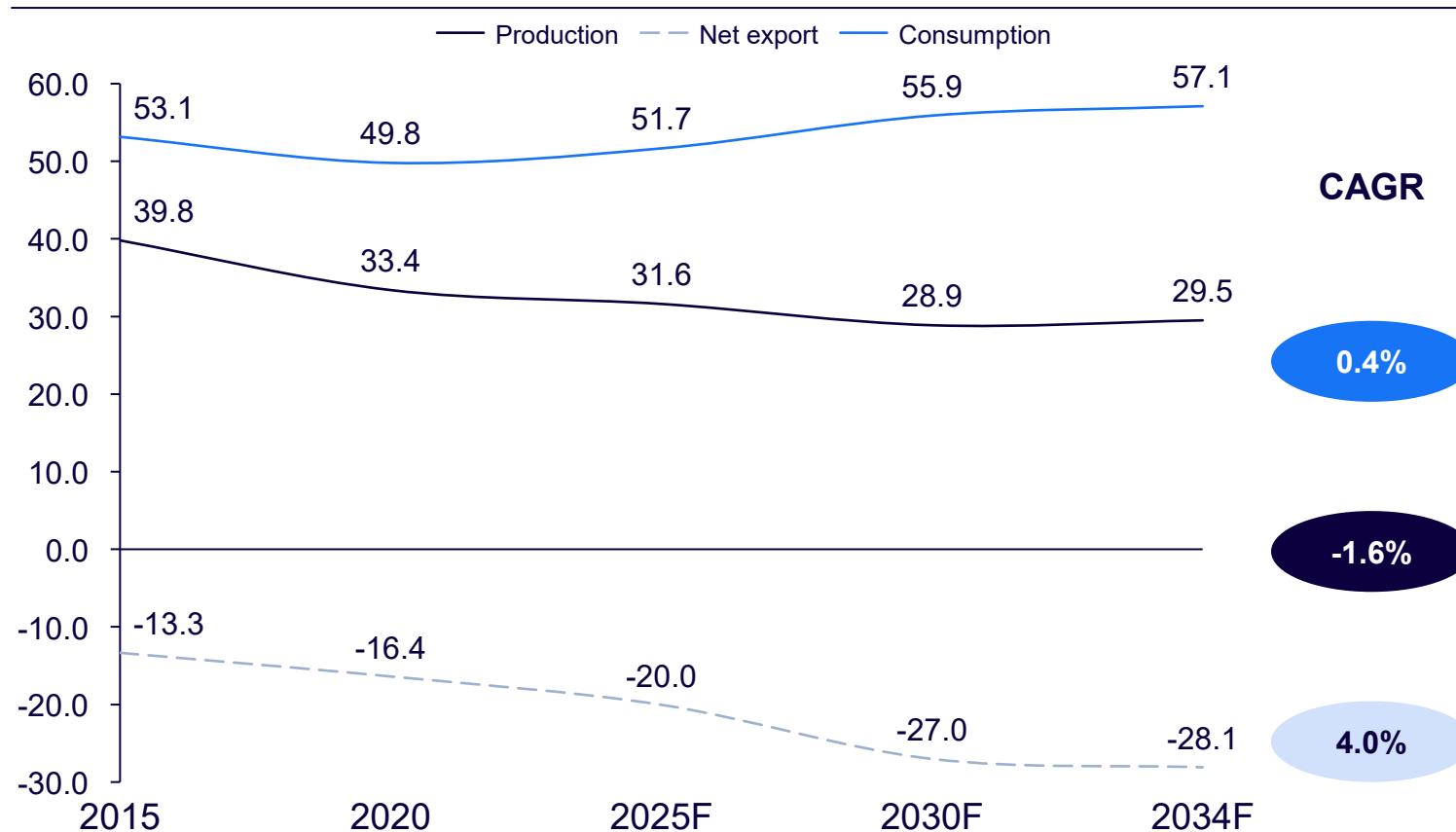
- Thailand already has sufficient refining capacity, allowing it to export surpluses to regional markets, particularly to Asia Pacific countries. Thailand's net refined fuel exports are expected to increase further following the completion of the refinery expansion project
- Domestic diesel consumption from the export-oriented industries face headwinds stemming from tariffs imposed by the US
- Self-sufficiency in most refined fuels is likely to be sustained, except for LPG and naphtha, due to limited production capacity and robust demand growth in the petrochemical sector

Note: The negative net export refers to import greater than export; * Barrels per day
Source: Fitch Solutions 2025, Multiple news sources, Arthur D. Little analysis

タイでは天然ガスの埋蔵量が減少し生産量が低下する一方で消費は増加しており、特にミャンマーからの供給縮小を背景にLNG輸入への依存度が年々高まっている

Dry natural gas key trends

2015 – 2034, bcm*



COMMENTS

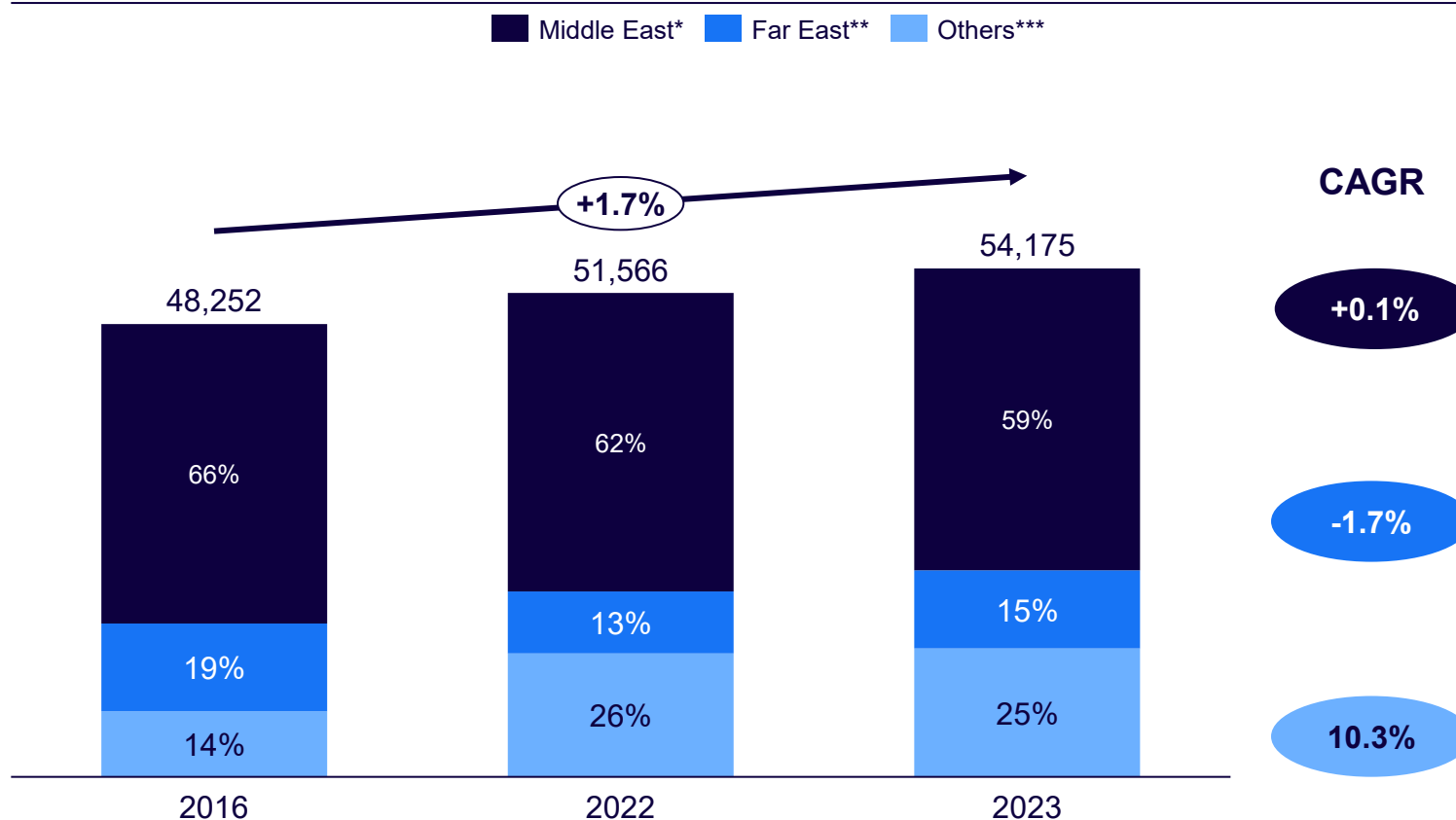
- Thailand faces various challenges to sustain natural gas production in future unless it can reverse depleting natural gas reserves. PTTEP has been instrumental in gas reserve replacement since it took over Erawan and Bongkot fields from Chevron
- Steadily falling natural gas supplies from Myanmar is a growing concern for Thailand. Pipeline natural gas imports from Myanmar have declined from 16% of Thailand's total natural gas supply in 2022 to just 8.7% in the first five months of 2025
- Additional downside risks to natural gas supplies from Myanmar and increased dependence on LNG imports is expected

Note: The positive net export refers to export greater than import; * billion cubic metres
 Source: Fitch Solutions 2025, Arthur D. Little analysis

タイは原油の純輸入国であり、特にUAEやサウジアラビアを中心とする中東からの輸入に大きく依存している

Crude oil major import partners

2016 – 2023, thousand tons



COMMENTS

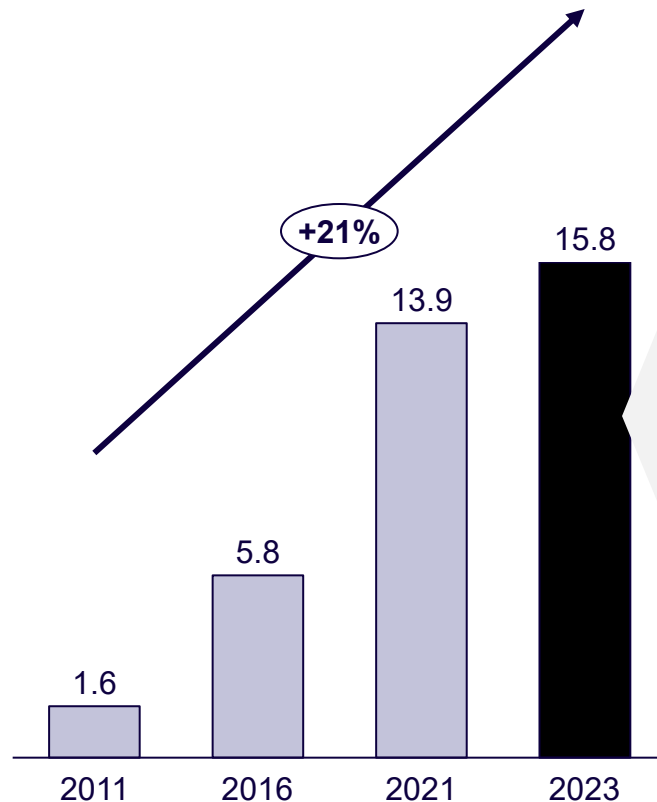
- Thailand is a net importer of crude oil, with overall imports growing at a CAGR of 1.7% for the period 2011 -2023
- Currently Middle East is the dominating partner, holding ~60% market share with UAE and Saudi Arabia accounting for more than 53% of total imports in 2023
 - The drop in YOY can be attributed to USA gaining prevalence as a supplier in third place
- Most of the imports are driven by deficits in domestic crude oil supply, combined with increase in refinery capabilities
- Far East and Others are largely suppliers of crude oil condensates which Thailand despite being a producer requires more to supplement demand, growing at -1.7% and 10.3% for the period 2016 - 2023
 - ~66% of total condensate imports are from Australia, Nigeria, Indonesia Philippines, Indonesia and Malaysia

Note: * Inclusive of UAE, Saudi Arabia and Qatar; ** Inclusive of Indonesia, Malaysia and Vietnam; *** Inclusive of USA, Angola, Australia, Russia, Libya, Nigeria, Algeria, etc; 1) Million tons
Source: MEMR Statistical Handbook 2022, Sinoimex, Arthur D. Little analysis

タイでは国内の天然ガス生産減少を補うため輸入が急増しており、主要な供給元はミャンマー、カタール、オーストラリア、マレーシアなどである

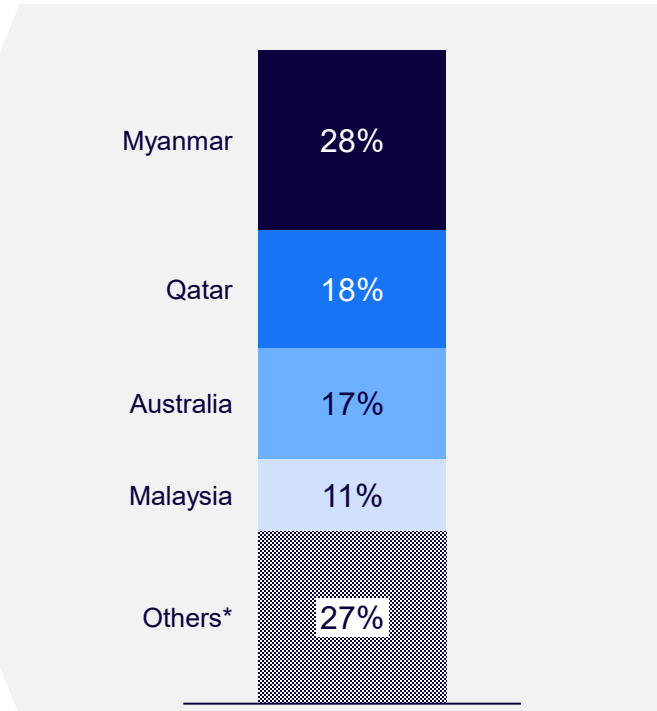
Natural gas imports

2011 - 2023, Mt²



Major import partners

2023, Mt²



COMMENTS



- Thailand's domestic gas production decline is driving higher LNG imports, which reached 11.55 Mt in 2023 (+40% YoY), the largest volume in Southeast Asia.
- From 2013–2023, imports grew at a 23.3% CAGR, now making up 2.9% of global LNG trade. LNG has overtaken pipeline gas, with spot cargoes accounting for ~56% of 2023 imports.
- Regasification capacity is set to expand from 19 Mtpa to ~30 Mtpa by 2030. Thailand is diversifying supply, securing a 5-year Oman LNG deal (300,000 tpa from 2025, plus a potential 800,000 tpa from 2026) and planning an extra 1 Mt of U.S. LNG and 400,000 t of U.S. ethane imports over the coming years.

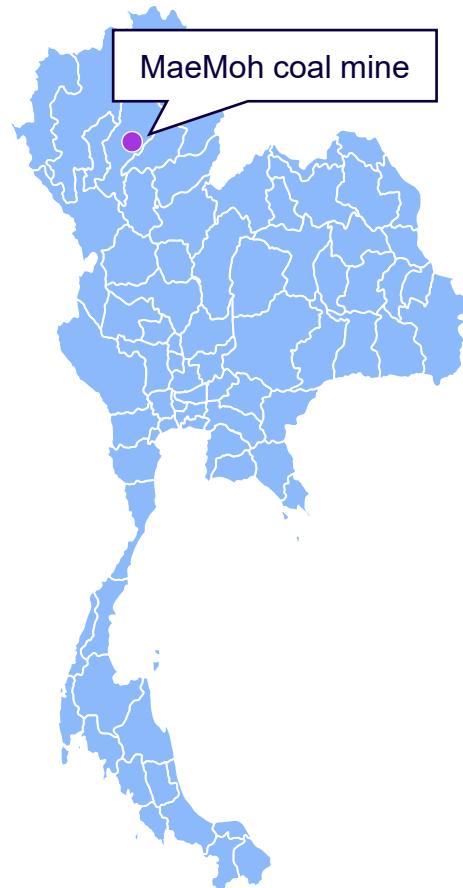
Note: * Others inclusive of USA, Oman, Angola, Brunei, Trinidad & Tobago, other Europe and other Africa; 2) Million tons
Source: Enerdata Energy Report 2024

タイにおける石油・ガスの埋蔵量の推移

Proven oil and gas reserves (Thailand 2023 - 2028)						
Indicator	2023e	2024e	2025f	2026f	2027f	2028f
Proven oil reserves, bn bbl	0.3	0.3	0.3	0.3	0.3	0.3
Proven oil reserves, mn bbl	300.3	298.1	284.3	270.1	255.2	239.8
Proven oil reserves, % y-o-y	0.1	-0.7	-4.6	-5.0	-5.5	-6.0
Reserves to production ratio (RPR), years	2.1	2.1	2.0	2.0	1.9	1.8
Natural gas proven reserves, tcm	0.1	0.1	0.1	0.1	0.1	0.1
Natural gas proven reserves, bcm	139.8	140.2	139.4	137.6	135.3	133.3
Natural gas proven reserves, % y-o-y	1.9	0.3	-0.6	-1.2	-1.7	-1.5
Natural gas reserves-to-production ratio, years	5.1	4.7	4.5	4.3	4.2	4.2

Proven oil and gas reserves (Thailand 2029 - 2034)						
Indicator	2029f	2030f	2031f	2032f	2033f	2034f
Proven oil reserves, bn bbl	0.2	0.2	0.2	0.2	0.2	0.2
Proven oil reserves, mn bbl	235.0	220.7	217.0	223.8	241.1	269.9
Proven Oil reserves, % y-o-y	-2.0	-6.1	-1.7	3.1	7.7	11.6
Reserves to production ratio (RPR), years	1.8	1.7	1.8	1.8	2.0	2.3
Natural gas proven reserves, tcm	0.1	0.1	0.1	0.1	0.1	0.1
Natural gas proven reserves, bcm	131.5	130.1	129.4	129.2	129.7	130.7
Natural gas proven reserves, % y-o-y	-1.3	-1.1	-0.6	-0.1	0.3	0.8
Natural gas reserves-to-production ratio, years	4.1	4.1	4.2	4.3	4.4	4.5

タイには現在稼働している石炭鉱山はランパーン県の メーモー鉱山 (Mae Moh coal mine) 1か所のみで、国内のすべての褐炭 (亜炭) 生産を担っている



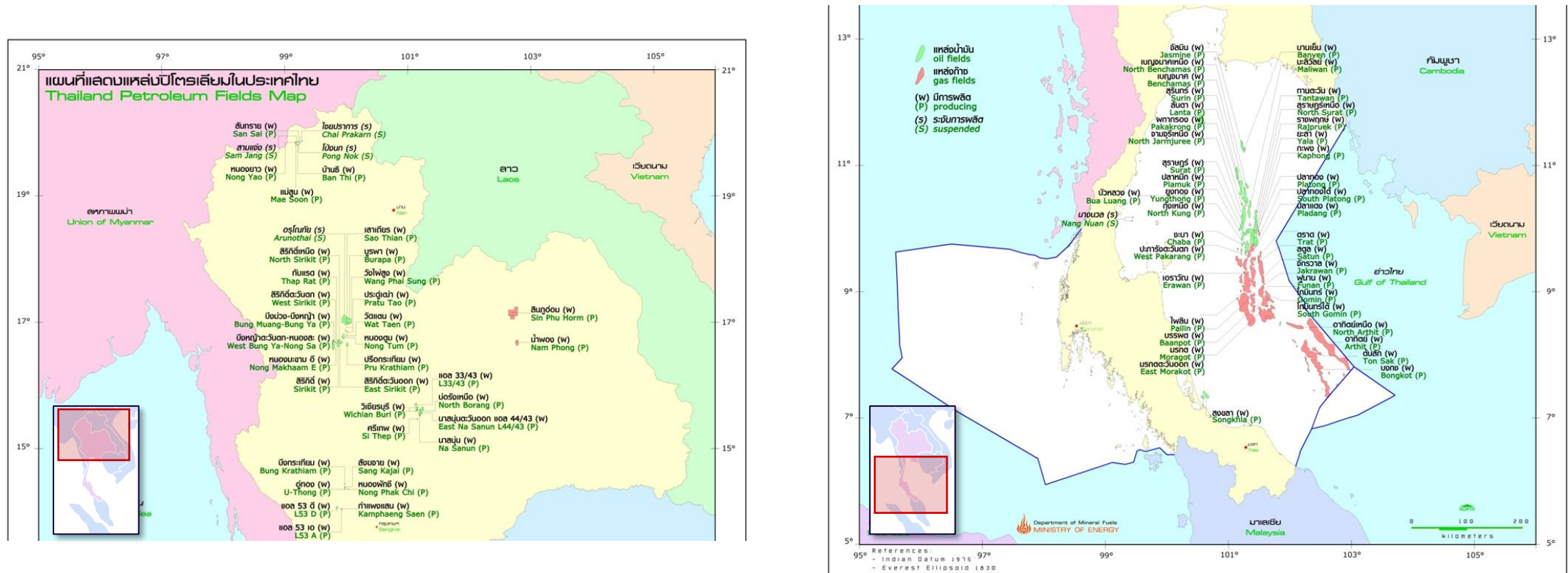
Description



- Thailand has only **1 mine** as of 2020, which accounts for all its domestic lignite production of 14.2 Mt in 2021, up 7.3% from 2020 production value of 13.3 Mt
- Despite plans to decommission the mine in 2019, state-run Electricity Generating Authority of Thailand (EGAT) which is the owner and operator have yet to do so
- **Key stats:**
 - **Location:** Lampang, Thailand
 - **Status:** Operating
 - **Max production:** 16 Mt/year
 - **2021 Production:** 14.2 Mt
 - **Mineable reserves:** 1,140 Mt
 - **Size:** 135 km²
 - **# Workers:** 1,464

タイの石油・天然ガスの埋蔵量はその大部分がタイ湾に集中しており、主要な油田・ガス田がこの地域に位置している

Thailand Petroleum Fields map



Note: Map is illustrative and not drawn to scale and is non-exhaustive in nature
Source: DMF

パイプラインの主な石油・ガスプロジェクトの一覧(1/3)

Name	Field name	Companies	Status	Est. peak oil/ liquid range, bpd ¹	Est. peak gas output, bcm ²	Fuel source
Block 12/27, Pailin Basin	Contract 4 (Ubon)	Chevron (35%), PTT Exploration and Production - PTTEP (60%) Mitsui (5%)	Appraisal	30,000	1.2	Gas & Condensate
Block Banyan	Block Banyan	China National Petroleum Corporation (100%)	Appraisal	-	-	Oil & Gas
Block BYW-NS	Block BYW-NS	China National Petroleum Corporation (100%)	Appraisal	-	-	Oil & Gas
Concession G6/48, Karawake Basin	Rossukon	Northern Gulf Petroleum (40%), Valeura Energy (30%), Mubadala Petroleum (30%)	Appraisal	-	-	Oil
Concession L53	Concession L53	Pan Orient Energy (50%)	Appraisal	-	-	Oil & Gas
Block B15, B16, B17 and G12/48	Greater Bongkot North	PTT Exploration and Production - PTTEP (66.67%), Total (33.33%)	Expansion	18,000	6	Gas & Condensate
Block G10/48, Pattani Basin	Block G10/48	Palang Sophon Ltd (11%), KrisEnergy (89%)	Exploration	-	-	Oil & Gas
Block L21/43	Block L21/43	China National Petroleum Corporation (100%)	Exploration	-	-	Oil & Gas
Block 10. 10A, 11, 11A	Platong II	Chevron (69.9%), Mitsui (27.4%), PTT Exploration and Production Public Company - PTTEP (2.7%)	Production	18,000	3.4	Gas & Condensate
BlockA-18	Cakerawala	Hess Corporation (50%), Petronas (50%)	Production	10,000	7.9	Gas & Condensate
Block B14A B15A, B16A, G8/50, Malay Basin	Arthit	PTT Exploration and Production Public Company - PTTEP (80%), Chevron (16%), Mitsui (4%)	Production	19,800	3.7	Gas & Condensate

パイプラインの主な石油・ガスプロジェクトの一覧 (2/3)

Name	Field name	Companies	Status	Est. peak oil/ liquid range, bpd ¹	Est. peak gas output, bcm ²	Fuel source
Block B15, B16, B17 and G12/48	Greater Bongkot South	PTT Exploration and Production Public Company - PTTEP (66.67%) Total (33.33%)	Production	15,000	3.6	Gas & Condensate
Block B-17 & C-19 and B-17-01 (MTJA)	Block B-17 & C-19 and B-17-01	Petronas (50%), PTT Exploration and Production Public Company - PTTEP (50%)	Production	-	-	Oil & Gas
Block B5/27	Jasmine, Ban Yen	Mubadala Petroleum (100%)	Production	28,000	-	Oil
Block B8/32	Benchamas	KrisEnergy (4.63%), Mitsui (16.71%) PTT Exploration Production - PTTEP (25%), Palang Sophon (2%), Chevron (51.66%)	Production	50,000	0.8	Oil & Gas
Block ESN & EU-1	Sinphuhorm	ExxonMobil (10%), PTT Exploration and Production - PTTEP (55%), Apico LLC (35%)	Production	-	1.3	Gas & Condensate
Block G10/48, Pattani Basin	Wassana	Palang Sophon (11%), Valeura Energy (89%)	Production	12,800	-	Oil
Block G7/50, B12/27	Contract 4	Chevron (35%), PTT Exploration and Production - PTTEP (60%) Mitsui (5%)	Production	20,000	4.2	Gas & Condensate
Concession G11/48	Nong Yao	Mubadala Petroleum (67.5%), Palang Sophon (10%), KrisEnergy (22.5%)	Production	11,400	-	Oil
Block G1/61 Erawan, Pattani Basin	Erawan	PTTEP	Production	50,500	6.5	Gas & Condensate
Block G1/61	Bangkot	PTTEP	Production	20,780	11	Gas & Condensate
G1/48 Concession, Kra Basin	Manora	Northern Gulf Petroleum (10%), Tap Oil (30%), Mubadala Petroleum (60%)	Production	15,000	-	Oil

パイプラインの主な石油・ガスプロジェクトの一覧 (3/3)

Name	Field name	Companies	Status	Est. peak oil/ liquid range, bpd ¹	Est. peak gas output, bcm ²	Fuel source
L33/43, L44/43 and SW1, Phetchabun Basin	L33/43, L44/43 and SW1	Loyz Energy (20%), ECO Orient (60%), Berlanga Holding (20%)	Production	6,000	-	Oil
Plamuk	Plamuk	PTT Exploration and Production - PTTEP (5%), Moeco Oil & Gas (23.75%), Chevron (71.25%)	Production	18,000	-	Oil
Block 7	Block 7	Shell (66.67%), Chevron (33.33%)	Suspended	-	-	Oil & Gas
Block 8	Block 8	Shell (66.67%), Chevron (33.33%)	Suspended	-	-	Oil & Gas
Block 9	Block 9	Shell (66.67%), Chevron (33.33%)	Suspended	-	-	Oil & Gas
Licence G4/50	Licence G4/50	Government of Thailand	Suspended	-	-	Oil & Gas
Block B8/38	Bualuang	Ophir Energy (100%)	Upgrade/EOR	17000	-	Oil
Block S1	Sirikit, Sirikit West, Pru Krathiam, Wat Taen, Thap Raet, Pratu Tao, Nong Tum, Sirikit East, Nong Makham	PTT Exploration and production PTTEP (100%)	Upgrade/EOR	27000	-	Oil & Gas
Block G1/65	Block G1/65	PTT Exploration and production PTTEP (100%)	Exploration	-	-	Oil & Gas
Block G3/65	Block G3/65	PTT Exploration and production PTTEP (100%)	Exploration	-	-	Oil & Gas
Block G2/65	Block G2/65	Chevron (100%)	Exploration	-	-	Oil & Gas

石油精製所の一覧

Location	Province	Capacity, '000s bpd ¹	Owner
Map Ta Phut	Rayong	280	PTTAR/PTTGC
Map Ta Phut	Rayong	175	Star Petroleum
Mueang Rayong	Rayong	215	IRPC
Phra Khanong	Bangkok	120	Bangchak Petroleum
Sriracha	Chon Buri	177	ESSO
Sriracha	Chon Buri	275	Thai Oil

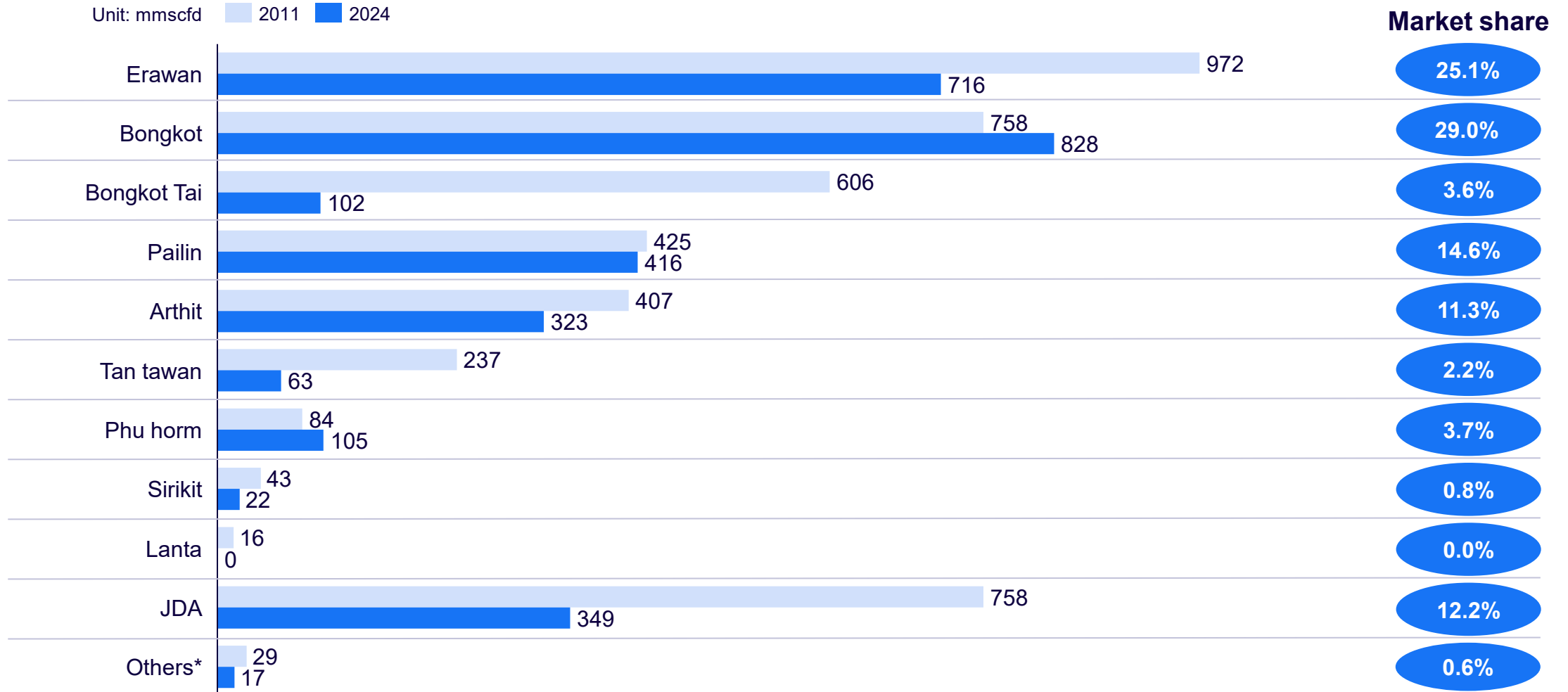
LNG輸入ターミナル一覧

Name	Capacity, mtpa ¹	Capacity, bcm ²	Status	Owner (s)	Start-up year
Map Ta Phut Phase I	5	6.8	Online	PTT	2012
Map Ta Phut Phase II	6.5	8.8	Online	PTT	2017
Nong Fab LNG	7.5	10.2	Online	PTT	2022
Map Ta Phut Phase III	5	6.8	Under Construction	PTT, Gulf Energy Development	2025
Surat Thani FSRU	5	6.8	Planned	PTT, EGAT	2027-2029

ガス分離プラントの一覧

Location	GSP #	Capacity, mmscfd ¹	Owner
Tambon Map Ta Phut	GSP-1	420	PTT PCL
Amphoe Mueang	GSP-2&3	820	PTT PCL
Amphoe Khanom	GSP-4	230	PTT PCL
Rayong	GSP-5	530	PTT PCL
Rayong	GSP-6	880	PTT PCL
Rayong	GSP-7	460	PTT PCL
Rayong	GSP-8	n.a	PTT PCL

タイの主要天然ガス田は全般的に生産量が減少しており、特にエラワン田の枯渇が深刻である一方、ボンコット田が最大シェア



Note: *Inclusive of Nam Phong, Jasmin, Yoong Thong, etc
 Source: Energy Policy and Planning Office 2025, Arthur D. Little analysis

PTTEPがタイで所有する天然ガス資産一覧

Natural gas reserves in Thailand			
Name	Phase	2024 avg. production	Unit
Erawan	Operating	739	mmscfd ¹
Bongkot	Operating	836	mmscfd
Arhit	Operating	321	mmscfd
MTJDA	Operating	339	mmscfd

EGATはMae Moh発電所の老朽設備を600MW規模でリプレースしつつ、8号機をバイオマス転換・2030年まで延長運転する計画を進めている



Mae Moh PP¹ replacement project timeline

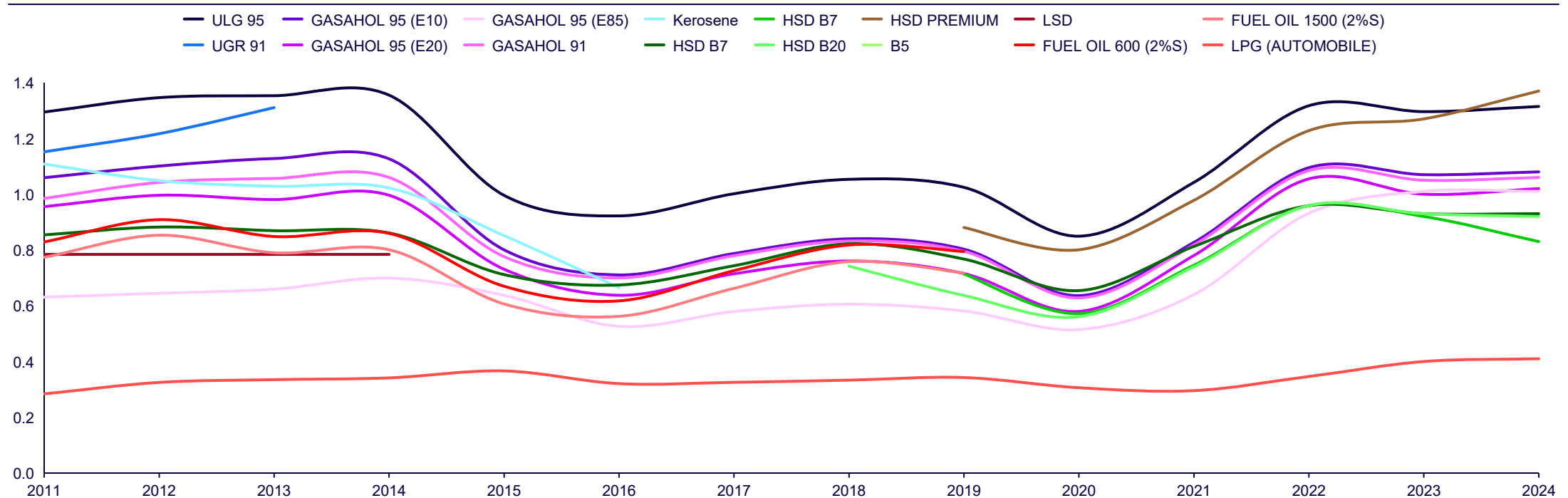
- **Dec 2022:** EGAT started a feasibility study to convert Unit 8 to be biomass-fired, whilst consulting Drax Global. Should it pass, it will result in 1.3 Mt of annual biomass purchase from the communities around the power plant
- **Mar 2023:** Thai Cabinet acknowledged the National Environment Board's resolution of the Environmental Impact Assessment Report done in Sep 2021
 - This report highlighted the need for a 600 MW¹ replacement project for the existing units 8-9 in the Mae Moh power plant
- **May 2023:** Transmission lines were included
- **Jun 2023:** USD 1.4 bn project is under revision, with funds disbursed, whilst the government stays on track with the 2070 zero carbon goal
- **Jun 2025:** Unit 9 to be decommissioned and Unit 8 to be extended until 2030 with regular maintenances and equipment upgrades to handle High Calcium-oxide charcoal

Note: 1) Power plant

Source: EGAT, Power Development Plan 2018 (Revision 1), Government press release 2022, Multiple news sources, Arthur D. Little analysis

タイの石油製品の小売価格は2014年から2020年にかけて下落したものの、その後は安定し、プレミアム燃料は変動が大きい一方で自動車用LPGは安定的に推移している

Retail petroleum products
2011 – 2024, USD/litre




More premium grade products like **ULG 95** and **HSD** saw **greater price volatility**, in comparison to the cheaper and more stable **LPG** option for automobiles

Contents


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- 3. パイプライン（ガス・石油）**
4. 次世代・再生可能エネルギー
5. 発電事業者
6. 発電所
7. 電力品質
8. 送電網
9. 電気料金
10. 電力需給状況

タイの天然ガス送電市場は国営PTTが独占しており、規制はエネルギー産業法の下でエネルギー規制委員会が管理している

Regulatory overview of the natural gas transmission market




คณะกรรมการกำกับกิจการพลังงาน
Energy Regulatory Commission



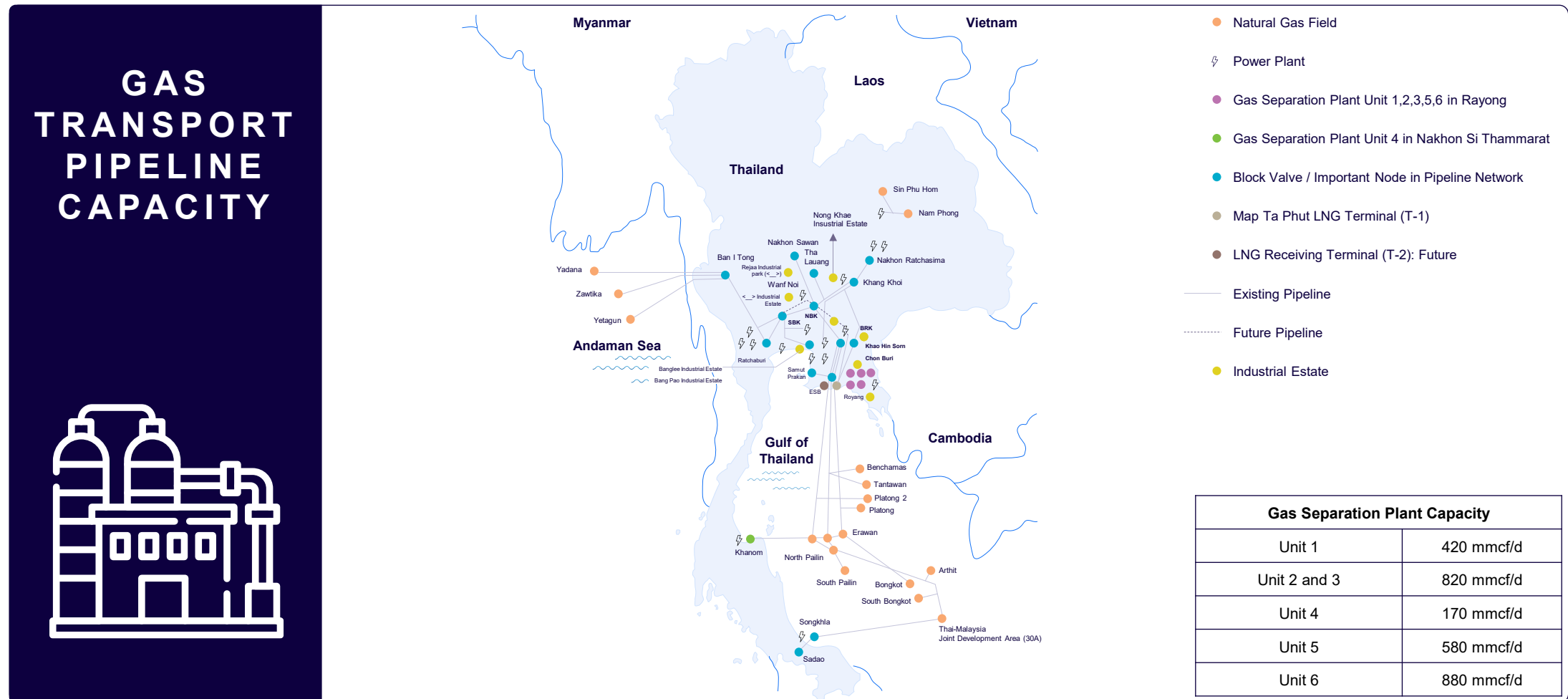
สำนักงานคณะกรรมการ
กำกับกิจการพลังงาน

**Energy Industry Act and
Energy Regulatory
Commission, Thailand**

➔

Firm	Details
 <p>PTT Public Company Limited</p> <p>Majority owned by the Thailand Ministry of Finance</p>	<ul style="list-style-type: none"> The construction, ownership, and interconnection of natural gas transportation pipelines are governed by the Energy Industry Act (EIA) The EIA empowers the Energy Regulatory Commission to approve the construction of all transmission pipelines The administration of natural gas pipeline transmission derives given state-specified rates of return <hr/> <ul style="list-style-type: none"> PTT owns the natural gas pipeline system and has a monopoly over the national pipeline business in Thailand, with >4,500km in total length Other than the pipelines connecting the gas fields in the Thai-Malaysian Joint Development Area and some pipelines located in and around industrial estates, PTT is the sole owner of natural gas distribution infrastructure in Thailand

2024年、PTTグループが独占する天然ガス送電パイプラインの総延長は4,500kmを超過



Note: Map is illustrative and not drawn to scale. Figures for total length include both onshore and offshore pipelines

Source: PTT Public Company Limited annual report 2024, Arthur D. Little analysis

List of observed PTT Group natural gas transmission pipelines in Thailand – Offshore

#	Name	Length (km)	Start-up year
1	Erawan - Rayong Gas Separation Plant (1st Principal Pipeline)	410	1981
2	Bongkot - Erawan (Parallel Pipeline)	171	1996
3	Erawan - Rayong Gas Separation Plant (Parallel Pipeline)	413	1996-1997
4	Erawan - Khanom Power Plant	161	1996
5	Arthit - Rayong Gas Separation Plant (3rd Pipeline)	605	2007
6	JDA - Arthit	95	2008
7	Chevron Platform Extension (Platong 2) - 3rd Offshore Pipeline	48	2011
8	South Bongkot - 3rd Offshore Pipeline	38	2012

List of observed PTT Group natural gas transmission pipelines in Thailand – Onshore (1/2)

#	Name	Length, km	Start-up year
1	Rayong Gas Separation Plant - Bang Pakong Power Plant (2nd Principal Pipeline)	107	1981
2	Bang Pakong Power Plant - South Bangkok Power Plant (1st Principal Pipeline)	57	1981
3	Bang Phli - Saraburi (Principal Pipeline)	99	1981
4	Nam Phong - Nam Phong Power Plant	3	1990
5	Rayong Gas Separation Plant - Bang Pakong Power Plant (Parallel Pipeline)	105	1996
6	Bang Pakong - Wang Noi Power Plant (Parallel Pipeline)	101	1996
7	Transmission Pipeline From Thai-Myanmar Border To Ratchaburi Power Plant	239	1998
8	Ratchaburi - Wang Noi	154	2000
9	Rayong Gas Separation Plant - Bang Pakong Power Plant (3rd Pipeline)	111	2006
10	Wang Noi Power Plant - Kaeng Khoi Power Plant	73	2006
11	Transmission Pipeline From The Pressure Control Station RA#6 - South Bangkok Power Plant	67	2007
12	Offshore - Chana Power Plant	8	2007
13	Transmission Pipeline To North Bangkok Power Plant	7	2009

List of observed PTT Group natural gas transmission pipelines in Thailand – Onshore (2/2)

#	Name	Length, km	Start-up year
14	Onshore Pipeline Along The Thai-Myanmar Border - BVW#1	0.59	2014
15	Rayong - Kaeng Khoi (4th Pipeline)	299	2015
16	Nakhon Sawan	193	2015
17	Nakhon Ratchasima	145	2018
18	Transmission System From The 6th Gas Compression Station Ratchaburi - Wang Noi To Ratchaburi Province	119	2021
19	The 5th Onshore Gas Pipeline Transmission Project (BV5.8)	151	2022
20	The 5th Onshore Gas Pipeline Transmission Project (BV5.6 - BP4)	57	2022
21	The 5th Onshore Gas Pipeline Transmission Project (GDF5 - TP5MX)	8	2022

2024年現在、タイの石油パイプラインはバンコク首都圏に近い中部地域に集中



COMMENTS



- Thailand's onshore oil pipelines are observed to primarily serve **major consumption and production centres**
- Pipeline connections to Rayong are likely due to the presence of **oil refineries** in the coastal port region, such as
 - Rayong II refinery, run by PTT Global Chemical Public

Note: Map is illustrative and not drawn to scale
Source: Modern Diplomacy

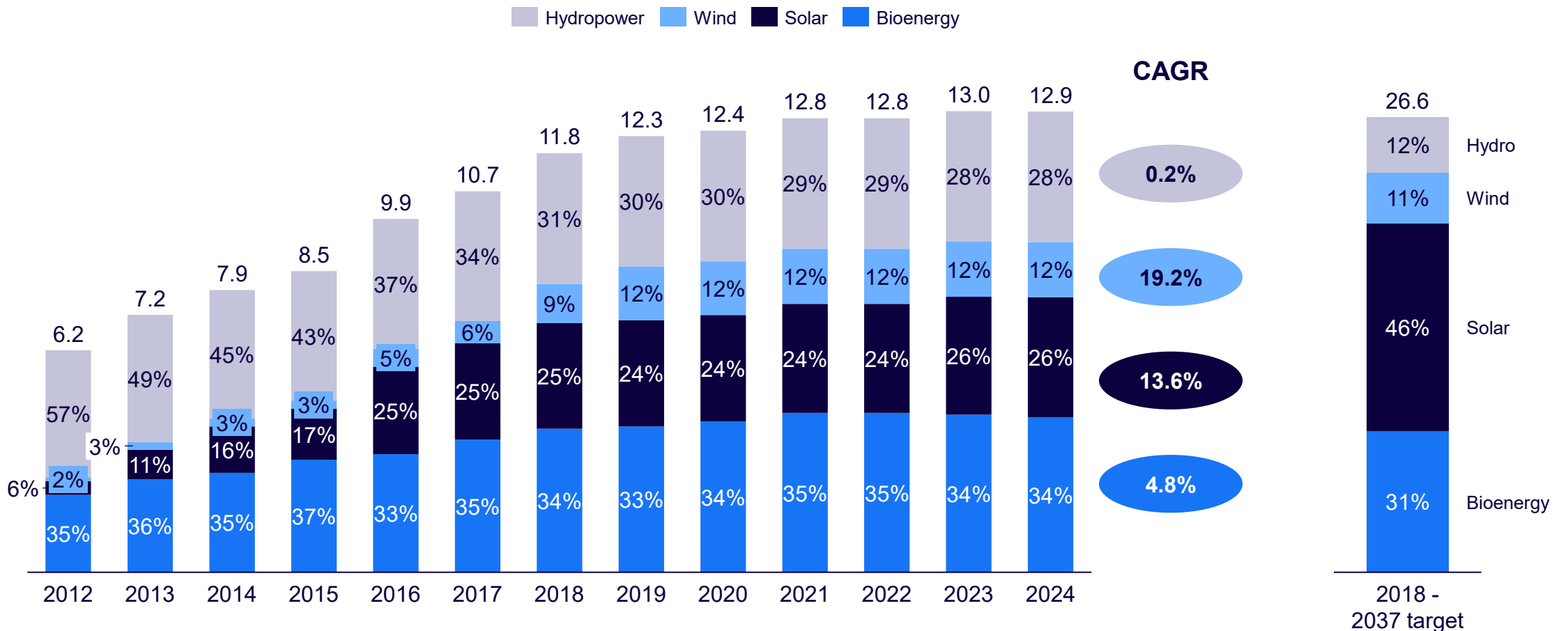
Contents

1. エネルギー構成・政策・監督機関
2. 化石エネルギー
3. パイプライン（ガス・石油）
- 4. 次世代・再生可能エネルギー**
5. 発電事業者
6. 発電所
7. 電力品質
8. 送電網
9. 電気料金
10. 電力需給状況

現在は、バイオエネルギーと太陽光が再エネの中心。2037年に向けて今後は太陽光をドライバーとして再生可能エネルギーが増加する

Renewable energy capacity¹

2012 – 2024 & target, GW

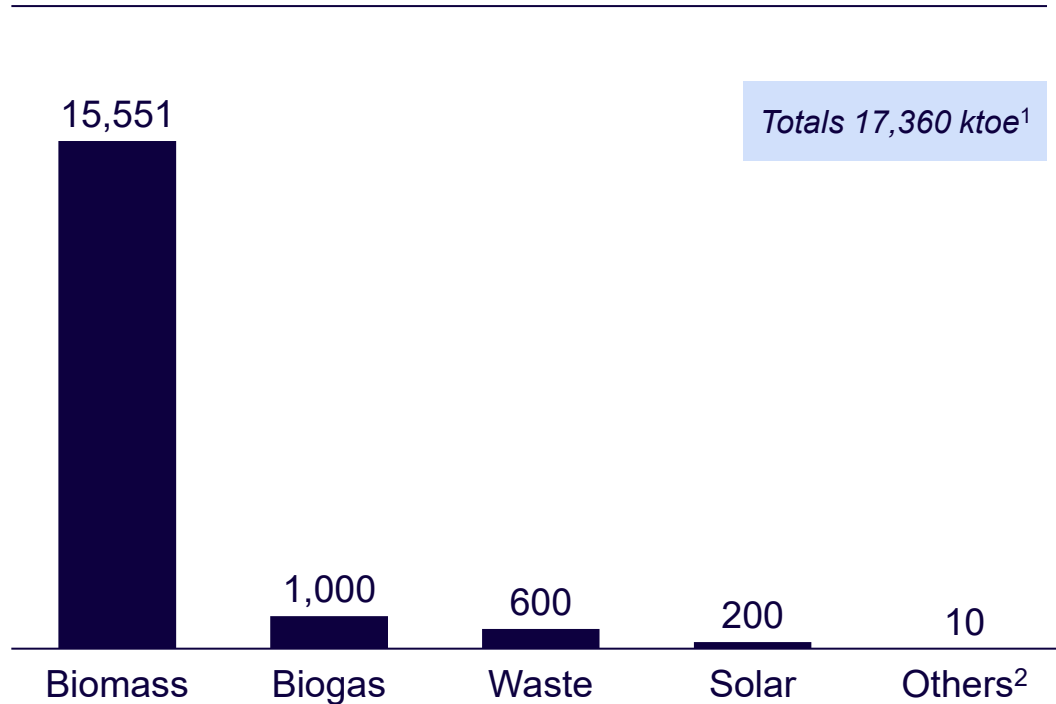


Note: * Exclusive of hydropower, small hydro has contribution of <1% contribution; 1) Geothermal contributions are significantly lower, hence excluded in database
Source: DEDE, International Renewable Energy Agency 2023, Arthur D. Little analysis

熱利用の主なエネルギー源としてバイオマスを重要視しているものの、現行計画に比べ、熱需要およびバイオマスによる熱供給の予測値は下方修正されている

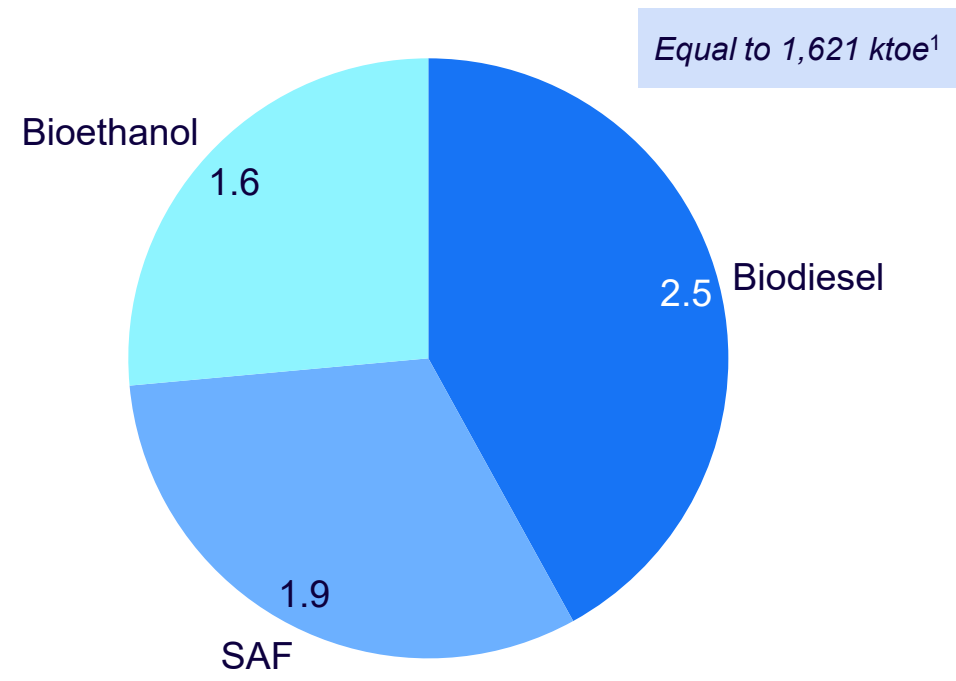
Heat production sources

2037, ktoe¹



Biofuel production

2037, Mn liters/day³



Compared to previous targets (AEDP 2018), heat and biofuel production targets has been revised downwards by ~35% and ~60% respectively

Note: 1) Kilo tons of oil equivalent; 2) Includes Hydrogen, pyrolysis oil, geothermal, 3) Million litres per day
Source: Thailand AEDP 2024 (draft), Arthur D. Little analysis

タイの再生可能エネルギーに関する法制度はAEDPが中核をなしているが、これに加え、FiTやPPAに関する複数の関連法令が制定されている

Renewable Energy Regulations in Thailand

#	Policy	Year	Status	Jurisdiction
1	Thailand Alternative Energy Development Plan (AEDP 2024-2037)	2024	Draft	National
2	Thailand Alternative Energy Development Plan (AEDP 2018-2037)	2024	In force	National
3	Direct Power Purchase Agreements (PPAs) for energy-intensive users	2024	In force	National
4	Corporate Power Purchase Agreements (PPAs) & Clean Energy Certificates	2022	In force	National
5	Feed-in Tariff for Very Small Power Producers (VSPP) (excluding solar PV)	2014	In force	National
6	Feed-in tariff for distributed solar systems	2013	In force	National
7	Biodiesel blending mandate	2012	In force	National
8	Renewable energy Development Plan (REDP) 2008-2022	2009	Ended	National
9	Solar hot water hybrid system promotion project	2008	In force	National
10	Small and Very Small Power Purchase Agreements	1994	In force	National

Note: * Excluding amendments

Source: International Energy Agency 2023, Various news articles

タイのENCON Fundは、省エネ・再エネ投資を支援する政府の主要な資金制度で、EERFやESCOファンドを通じて融資や投資を行っている

ENCON Energy Conservation Promotion Fund	EERF Energy Efficiency Revolving Fund	ESCO Energy Service Company Fund
<ul style="list-style-type: none"> Established in 1992, it's the government's main financial mechanism to support energy efficiency (EE) and RE projects. USD 160 mn budget in 2020, and supported 1,035 projects The source of funds comes from a sales tax of USD 0.1/kL on petroleum products¹ The main source of financial support is provided to factories and buildings for investment in energy conservation projects <ul style="list-style-type: none"> The fund can also be tapped by other agencies for investments The two main funds under ENCON are the Energy Service Company (ESCO) Fund (USD 37.7 mn) and Energy Efficiency Revolving Fund (EERF) 	<ul style="list-style-type: none"> Objectives: <ul style="list-style-type: none"> Stimulate and leverage commercial funding for EE projects for industrial and commercial facility owners, ESCOs and project developers Help commercial Thai banks streamline internal processes for project appraisal and loan disbursement Provides credit lines to 11 participating Thai banks as of 2020 with 0% interest rate to banks, with repayment period of <7 years <ul style="list-style-type: none"> Max loan/project: USD 1.25 mn Phase 1: USD 100 mn Phase 2: USD 66 mn Phase 3: USD 65 mn (incl. RE) Phase 4: USD 13 mn Phase 5: USD 17 mn 	<ul style="list-style-type: none"> Objectives: <ul style="list-style-type: none"> Encourage >10 ktoe/year energy saving USD 7.25 mn/year² Promote private investments in RE Assist entrepreneurs in minimizing their energy cost, and achieving revenues from carbon credit Provide start up capital for energy efficiency and RE companies Investment types include equity, equipment leasing, venture capital, GHG, project facilities, credit guarantee facilities Phase 1: 6 equity, 9 equipment leasing Phase 2: 5 equity, 43 equipment leasing Phase 3: 19 equipment leasing Phase 4: 1 equity, 9 equipment leasing

VSP¹水力発電プロジェクト

Hydropower projects, by region

2023

#	Project	Location			Capacity, kW	Start-up year
		Sub-district	District	Province		
1	Mae Nawang	Ban Luang	Mae Aye	Chiang Mai	52	2022
2	Mae Kongka	Gong Kaek	Mae Chaem	Chiang Mai	35	2022
3	Por Kro, Mae	Mae Song	Tha Song Yang	Tak	52	2023
4	Rameng, Mae	Mae Song	Tha Song Yang	Tak	47	2023
5	Amlong, Huai	Ban Kaat	Mae Sariang	Mae Hong Son	65	2024
6	Raphring	Phawo	Mae Sot	Tak	32	2024
7	Mae Yang Min	Sri Thoi	Mae Suai	Chiang Rai	54	2025
8	Huai Mae Ning	Gong Kaek	Mae Chaem	Chiang Mai	27	2025
9	Huai Kong Paegro	Mae Waluang	Tha Song Yang	Tak	29	2026
10	Huay Pong Saen Pik	Na Pu Pom	Pang Mapha	Mae Hong Son	26	2026
Total capacity of 10 community hydroelectric power plant projects					419	

Note: 1) Very Small Power Producer. <200 kW

Source: Alternative Energy Development Plan 2018, Arthur D. Little analysis

SPP¹水力発電プロジェクト(1/3)

Hydropower projects, by region

2023

#	Project	Location			Capacity, kW	Start-up year
		Sub-district	District	Province		
1	Nam Max Navng	Ban Luang	Mae Aye	Chiang Mal	719	2018
2	Hual Nam Kham	Huay Hia	Nakon Thal	Phltsanulok	798	2018
3	Mae Mong Kham	Gong Kaek	Mae Jam	Chiang Mal	739	2019
4	Huay Yal 5	Wang Nok Aon	Wong Thong	Phltsanulok	1,328	2020
5	Nan River	Ngop	Thung Chang	Nan	988	2020
6	Mae Sarlang	Pa Pae	Mae Sareang	Mae Hong Son	929	2020
7	Mother's Aunt ²	Mae Sao	Mae Aye	Chiang Nal	831	2021
8	Mae Sa	Yuai Hua Na	Vieng Sa	Nan	792	2021
9	Huay Lal Ya Nol	Mae Lamung	Um Pang	Tak	672	2021
10	Mae Tho River-Wlang Pa Pao	Mae Jedi Mai	Vieng Pa Pao	Chiang Rai	430	2021
11	Mae Tho River-Wlang Pa Pao	Mae Tho	Mae La No	Mae Hong Son	426	2021

Note: 1) Small Power Producer >200 kW

Source: Alternative Energy Development Plan 2018, Arthur D. Little analysis

SPP¹水力発電プロジェクト(2/3)

Hydropower projects, by region

2023

#	Project	Location			Capacity, kW	Start-up year
		Sub-district	District	Province		
12	Mae Salong River	Mae Salong Nai	Mae Fah Luang	Chiang Rai	527	2022
13	Pong Nam Ron Canal 14	Pong Naam Ron	Pong Naam Ron	Chanthaburi	6,200	2022
14	Thung Plain Canal 15 Hual	Pluang	Khichaku	Chanthaburi	2,800	2022
15	Mae Mae Paeng Sal	Mae Na	Chiang Dao	Chiang Mal	453	2023
16	Mae Taman	Kid Chang ²	Mae Teng	Chiang Mal	408	2024
17	Mae Aeb	Baan Saew	Chiang Saen	Chiang Rai	409	2025
18	Pha Nol House	Mae Salong	Mae Fah Luang	Chiang Rai	314	2025
19	Mother Laka	Muang Pon	Khun Yum	Mae Hong Son	369	2026
20	Hua Mekong	Mae Suad	Sop Moei	Mae Hong Son	345	2026
21	Hua Tha Kuay 1	Jao Wat	Baan Rai	Uthai Thani	424	2027
22	Hua Tha Kuay 2	Jao Wat	Baan Rai	Uthai Thani	328	2028
23	Hua Kaeng Pantao	Mae Na	Chiang Dao	Chiang Mal	224	2028

Note: 1) Small Power Producer >200 kW; 2) Due to translation, some names might not be accurately reflected

Source: Alternative Energy Development Plan 2018, Arthur D. Little analysis

SPP¹水力発電プロジェクト(3/3)

Hydropower projects, by region

2023

#	Project	Location			Capacity, kW	Start-up year
		Sub-district	District	Province		
24	Khlong Ra	Song Praek	Phang Nga	Phang Nga	2,961	2029
25	Ban Bang Kum	Kapong	Kapong	Phang Nga	987	2029
26	Kapong Canal	Kapong	Kapong	Phang Nga	886	2030
27	Klongmen	Chang Glang	Nakhon Si Thammarat	Nakhon Si Thammarat	561	2030
28	Lamphun Canal 29	Lamphun	Nasan	Surat Thani	707	2031
29	Duan Canal	La Aye	Chawang	Nakhon Si Thammarat	493	2031
30	Nang Yon Canal	Kura	Kuraburi	Phang Nga	447	2031
31	Khlong Ranae	Pi Pun	Pi Pun	Nakhon Si Thammarat	436	2032
32	Tha Phae Canal	Chang Glang	Chang Glang	Nakhon Si Thammarat	386	2575
Total capacity of small hydroelectric power 32 projects					29,317	

稼働中の水力発電プロジェクト一覧¹

NON-EXHAUSTIVE

Hydropower projects located in dams, by region

2023

#	Name	Reservoir capacity, bcm ²	# of generators	Generator capabilities, MW/unit ²	Contracted capacity, MW ²	Annual Capacity, mn kWh ²
1	Srinagarind (Kanchanaburi)	17.75	5	120 (Units 1-3), 180 (Units 4-5)	720	1,250
2	Bhumibol (Tak)	13.46	8	82 (Units 1-6), 115 (Unit 7), 171 (Unit 8)	779	1,062
3	Sirkit (Uttaradit)	9.51	4	125	500	1,000
4	Ubol Ratana (Khon Kaen)	2.43	-	-	25	56
5	Vajiralongkorn (Kanchanaburi)	8.86	-	-	300	777
6	Sirindhorn (Ubon Ratchathani)	1.97	-	-	36	52
7	Chulabhorn (Chaiyaphum)	0.16	2	20	40	57
8	Nam Pung (Sakon Nakhon) ³	0.17	2	3	6	1,250
9	Pak Mun (Ubon Ratchathani)	-	4	34 (Units 1-4)	136	280
10	Rajjaprabha (Surat Thani)	5.64	3	80 (Units 1-3)	240	554
11	Bang Lang Dam (Yala)	1.42	3	-	84	289
12	Kang Krachan (Phetchaburi)	0.71	-	-	19	70
13	Tha Thung Na (Kanchanaburi)	0.05	-	-	39	170
14	Mae Ngat Somboon Chon (Chiang Mai)	0.27	2	5 (Units 1-2)	9	29

Note: 1) Only encompasses EGAT dams and power plants; 2) Values are rounded up; 3) Possible errors in reported values

Source: Electricity Generating Authority of Thailand 2023, Arthur D. Little analysis

稼働中の水力発電プロジェクト一覧¹NON-EXHAUSTIVE

Hydropower projects located downstream, by region

2023

#	Name	Reservoir capacity, mcm ²	# of generators	Installed capacity, MW/unit ²	Annual Capacity, mn kWh ²	Transmission line
1	Mae Klong Mini Hydro PP	8.20	2	6	74	22 kV
2	Khun Dan Prakan Chon Mini Hydro PP	224.00	1	11	28	22 kV
3	Naresuan Mini Hydro PP	8.20	1	-	43	22 kV
4	Chao Phraya Mini Hydro PP	144.70	2	6	62	22 kV
5	Kwae Noi Bumrung Dan Mini Hydro PP	769.00	2	15	147	22 kV
6	Kiew Kho Ma Mini Hydro PP	170.00	3	2	69	22 kV
7	Pha Chuk Mini Hydro PP	-	2	7	74	-
8	Khlong Tron Mini Hydro PP	-	2	1	12	22 kV
9	Pasak Jolasid Mini Hydro PP	785.00	1	7	35	22 kV
10	Chulabhorn Mini Hydro	-	1	1	6	22 kV

Note: 1) Only encompasses EGAT dams and power plants; 2) Values are rounded up
Source: Electricity Generating Authority of Thailand 2023, Arthur D. Little analysis

浮体式太陽光発電の効率改善プロジェクト一覧

Solar power projects, by region

2023

Efficiency improvement/increase in profit plan production capacity with floating solar energy

#	Name	Province	District	Sub-district	Solar floating from minimum water level, MW
1	Ban Phiuang Dam	Chantaburi	Kitchanakut	Pluang	44
2	Kirthan Dam	Chanthabur	Makam	Pataw	218
3	Hual Pra Thao Dam - Lower Dam	Chaiyaphum	Kaeng Khro	Tha Hin Ngom	5.35
4	Hual Pra Thao Dam-Top Dam Mae	Chaiyaphum	Kaeng Khro	Na Nong Thum	61
5	Mao Dam Mae	Chiang Ma	Fang	Mon Pin	3
6	Sap Dam Mae	Chiang Mai	Samoeng	South Siemong	2.1
7	Sa Nga Dam	Mae Hong Son City	Muang	Mok Jam Pae	1
8	Nam Wa	Nan	Wiang Sa	Lanna Nong Mai	1.8
9	Dam Mae Phong Dam	Phayao	Dok Kham Tai	Ban Tham	0.18
Total					336.43

稼働中の太陽光発電プロジェクト一覧(1/2)

NON-EXHAUSTIVE

Solar power projects, by region

2025

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
1	Sa Kaeo	BSP Saen Phu Dat-Ban Phoe	1.6	Bangkok Solar Power	Operating	2007
2	Udon Thani	BSP Na Phu-Phen	1.8	Bangkok Solar Power	Operating	2009
3	Nakhon Ratchasima	Korat-I	7.1	SPCG	Operating	2010
4	Saraburi	Kengkoi-III	6.0	Infinite Green	Operating	2010
5	Phra Nakhon Si Ayutthaya	Bang Pa-In 1	12.0	BCPG	Operating	2011
6	Chonburi	Kabinburi	9.6	Loxley	Operating	2011
7	Nakhon Phanom	Nakhon Phanom-I	7.1	SPCG	Operating	2011
8	Nakhon Ratchasima	Korat-II	7.1	SPCG	Operating	2011
9	Phra Nakhon Si Ayutthaya	Bang Pa-In 2	41.0	BCPG	Operating	2012
10	Saraburi	Bang Len-I / Sai Thong	9.9	Yanhee Solar	Operating	2012
11	Chonburi	Huai Yai	9.6	Xeon Top	Operating	2012
12	Lopburi	Phatthana Nikhom	9.6	EA Solar	Operating	2012
13	Roi Et	SPP5 Roi Et	9.6	EGCO	Operating	2012
14	Saraburi	SPP2 Saraburi	9.6	EGCO	Operating	2012
15	Sisaket	SPP3 Sisaket	9.6	EGCO	Operating	2012
16	Nakhon Pathom	Sai Prapa	8.7	Yanhee Solar	Operating	2012
17	Chai Nat	Dong korn	7.8	G-Power Source	Operating	2012

稼働中の太陽光発電プロジェクト一覧(2/2)

NON-EXHAUSTIVE

Solar power projects, by region

2025

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
18	Kanchanaburi	Coop Kanchanaburi	4.7	BCPG	Operating	2018
19	Samut Prakan	Chachoengsao - WVO	4.3	B.Grimm	Operating	2018
20	Phetchabun	Chon Daen - Agricultural Coop	2.8	B.Grimm	Operating	2018
21	Phetchabun	Phukham	2.1	United Power	Operating	2018
22	Nakhon Si Thammarat	Kathun	1.4	United Power	Operating	2018
23	Udon Thani	BSP Udon Thani	0.3	Bangkok Solar Power	Operating	2018
24	Chaiyaphum	Udon Thani	6.0	Unknown	Operating	2019
25	Krabi	Kabri - PS&S	6.0	PS&S	Operating	2019
26	Rayong	IRPC Floating Solar Farm	15.0	Unknown	Operating	2020
27	Ratchaburi	SPM group floating PV	2.4	Greenyellow	Operating	2021
28	Rayong	U-Tapao - Solar	18.0	Unknown	Operating	2022
29	Nakhon Ratchasima	Smart Energy Floating Solar	5.2	CHPP	Operating	2022
30	Ubon Ratchathani	UBE Ubon Ratchathani	2.8	BayWa r.e.	Operating	2022
31	Nakhon Ratchasima	Smart Energy Rooftop Solar	2.1	CHPP	Operating	2022
32	Saraburi	CP-Meji Floating Solar	2.0	KP Greenery	Operating	2022
33	Prachinburi	NPS Green Lake	60.0	National Power Supply Co	Operating	2023
34	Sa Kaeo	Sa Kaeo Super Solar Hybrid PV	49.0	Super Solar Hybrid	Operating	2023

進行中の太陽光発電プロジェクトの一覧(1/3)

NON-EXHAUSTIVE

Solar power projects, by region

2025

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
1	Suphan Buri	Blue Solar SPP Hybird PV	40.8	Essential Power	Construction	2023
2	Nong Bua Lamphu	Ubol Ratana Dam Hydro-Floating Solar Hybrid	28.8	EGAT	Financial Close	2023
3	Suphan Buri	Breeze and Shine Power - PV	90.0	Gulf	Approved	2024
4	Kanchanaburi	Pattana Solar - PV	72.0	Gulf	Approved	2024
5	Kanchanaburi	Sky Power	57.6	Sky Power	Approved	2024
	Khon Kaen					
6	Phetchabun	Energy First - PV	73.2	Gulf	Approved	2025
7	Mae Hong Son	Duangtawan Energy - PV	72.0	Gulf	Approved	2025
8	Surin	Thaipat Solar	61.2	Thaipat Solar	Approved	2025
9	Sukhothai	Suriyapat	57.6	Suriyapat	Approved	2025
10	Buriram	Racha Solar	45.4	Racha Solar	Approved	2025
11	Tak	Bhumibol Hydro-Floating Solar Hybrid	189.6	EGAT	Concept	2026
12	Kanchanaburi	Srinagarind Hydro-Floating Solar Hybrid	168.0	EGAT	Concept	2026
13	Phetchaburi	Saengdee Clean Energy - PV	70.8	Gulf	Approved	2026
14	Kamphaeng Phet	Power CE 1	109.2	Power CE	Approved	2026
15	Chonburi	NP Watt	89.8	NP Watt	Approved	2027
16	Kanchanaburi	Vajiralongkorn Hydro-Floating Solar Hybrid	60.0	EGAT	Concept	2027
17	Suphan Buri	Anurak Green Power - PV	55.2	Gulf	Approved	2027

Note: 1) DC capacity

Source: Rystad Energy 2025

進行中の太陽光発電プロジェクトの一覧(2/3)

NON-EXHAUSTIVE

Solar power projects, by region

2025

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
18	Suphan Buri	Blue Wave Power - PV	87.8	Gulf	Approved	2028
19	Phetchabun	Saeng Arun Clean Energy - PV	78.0	Gulf	Approved	2028
20	Ratchaburi	Solar For All	69.6	Solar For All	Approved	2028
21	Phetchabun	Sang Siam	66.0	Sang Siam	Approved	2028
22	Phichit	Sunray Renewable Energy - PV	54.0	Gulf	Approved	2028
23	Nakhon Sawan	Ruang Siam - PV	51.6	Gulf	Approved	2028
24	Nakhon Sawan	Double Clean Energy - PV	55.2	Gulf	Approved	2029
25	Ubon Ratchathani	WHA Solar - PV	34.7	WHA Group	Approved	2029
26	Lopburi	Wang Khon Khwang Solar Energy - PV	27.6	Super Energy	Approved	2029
27	Kanchanaburi	Kanchanaburi Solar - PV	25.2	Super Energy	Approved	2029
28	Ratchaburi	Banpong Solar Energy - PV	21.6	Super Energy	Approved	2029
29	Narathiwat	Gunkul One Energy 2 - PV	21.1	Gunkul	Approved	2029
30	Lopburi	Nongkhaem Solar Energy - PV	19.2	Super Energy	Approved	2029
31	Kanchanaburi	PR Chiang Mai - PV	61.7	Prime Road	Approved	2030
32	Nong Khai	Gunkul One Energy 9 - PV	39.6	Gunkul	Approved	2030
33	Songkhla	Gunkul Solar Powergen - PV	39.6	Gunkul	Approved	2030
34	Khon Kaen	WH Solar Two - PV	36.0	WHA Group	Approved	2030

進行中の太陽光発電プロジェクトの一覧(3/3)

NON-EXHAUSTIVE

Solar power projects, by region

2025

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
35	Nakhon Sawan	A Plus Power PV	300-400	EGAT	Concept	2031
36	Ratchaburi	5 Amata Ratchaburi	700-800	EGAT	Concept	2032
37	Prachinburi	17AYH Pho Ngam	0-50	EGAT	Concept	2033
38	Sa Kaeo	17AYH Nong Waeng	700-800	EGAT	Concept	2033
39	Prachinburi	17AYH Non Hom	50-100	EGAT	Concept	2033
40	Prachinburi	17AYH Ban Phluang II	200-300	EGAT	Concept	2034
41	Prachinburi	17AYH Ban Phluang I	500-600	EGAT	Concept	2035
42	Saraburi	17AYH Ban Lam II	200-300	EGAT	Concept	2036
43	Saraburi	17AYH Bann Lam I	500-600	EGAT	Concept	2037

稼働中の風力発電¹⁾プロジェクト一覧(1/2)

NON-EXHAUSTIVE

Wind power projects, by region

2023

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
1	Nakhon Ratchasima	Khlong Phai- Lam Takhong	2.5	Gunkul	Operating	2009
2	Nakhon Si Thammarat	Nakhon Si Thammarat - IV	1.5	DEDE	Operating	2009
3	Songkhla	Sathing Phra	1.5	PEA	Operating	2010
4	Nakhon Ratchasima	Huaybong - II (KR 1)	103.5	Wind Energy	Operating	2012
5	Chaiyaphum	Chaiyaphum - II	6.9	EGCO	Operating	2013
6	Nakhon Ratchasima	Huaybong - III (KR Two)	103.5	Wind Energy	Operating	2013
7	Nakhon Si Thammarat	Southern Thailand Wind Power	10.0	Lomligor	Operating	2015
8	Chaiyaphum	Chaiyaphum - I	80.0	EGCO	Operating	2016
9	Chaiyaphum	Watabak Wind Farm	60.0	Wind Energy	Operating	2016
10	Nakhon Ratchasima	Huaybong - IV	10.0	Gunkul	Operating	2016
11	Nakhon Ratchasima	Huaybong - V	2.5	Gunkul	Operating	2016
12	Nakhon Ratchasima	Huaybong (Wayu Wind Farm)	50.0	Gunkul	Operating	2016
13	Phetchabun	Khao Kor	60.0	Ratch Energy	Operating	2016
14	Nakhon Ratchasima	Khlong Phai- Lam Takhong 2	24.0	EGAT	Operating	2017
15	Nakhon Si Thammarat	Hadkunghan 2	45.0	Energy Absolute	Operating	2017
16	Nakhon Si Thammarat	Hadkunghan 3	45.0	Energy Absolute	Operating	2017
17	Songkhla	Hadkunghan 1	36.0	Energy Absolute	Operating	2017

稼働中の風力発電¹⁾プロジェクト一覧(2/2)

NON-EXHAUSTIVE

Wind power projects, by region

2023

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
17	Chaiyaphum	Theparak 4	90.0	Wind Energy	Operating	2018
18	Chaiyaphum	Tropical wind	90.0	Wind Energy	Operating	2018
19	Nakhon Ratchasima	K.R.S Three	90.0	Wind Energy	Operating	2018
20	Nakhon Ratchasima	Krissana Wind NKS	90.0	Wind Energy	Operating	2018
21	Nakhon Ratchasima	Mittraphap	52.5	Gunkul	Operating	2018
22	Nakhon Ratchasima	Sarahnlom	67.5	Gunkul	Operating	2018
23	Chaiyaphum	Hanuman Wind Project-1	45.0	Energy Absolute	Operating	2019
24	Chaiyaphum	Hanuman Wind Project-10	80.0	Energy Absolute	Operating	2019
25	Chaiyaphum	Hanuman Wind Project-5	48.0	Energy Absolute	Operating	2019
26	Chaiyaphum	Hanuman Wind Project-8	45.0	Energy Absolute	Operating	2019
27	Chaiyaphum	Hanuman Wind Project-9	42.0	Energy Absolute	Operating	2019
28	Chaiyaphum	Theparak	90.0	Wind Energy	Operating	2019
29	Mukdahan	Rom Klao	45.0	Alpha Energy	Operating	2019
30	Nakhon Si Thammarat	Lomligor	9.0	BCPG	Operating	2019
31	Mukdahan	Bo Thong 1	8.0	B.Grimm	Operating	2021
32	Mukdahan	Bo Thong 2	8.0	B.Grimm	Operating	2021

進行中の風力¹⁾プロジェクト一覧 (1/2)

NON-EXHAUSTIVE

Wind power projects, by region

2025

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
1	Chumphon	Alpha One Project	48.0	Gulf	Approved	2025
2	Khon Kaen	Wind Mahasarakham 1	90.0	Energy Absolute	Approved	2025
3	Mukdahan	Isaan Clean Energy	90.0	Gulf	Approved	2025
4	Prachuap Khiri Khan	Alpha Two Project	70.0	Gulf	Approved	2025
5	Nakhon Ratchasima	Dan Khun Thot Wind One	89.7	Wind Energy Holding	Approved	2026
6	Ubon Ratchathani	Blue Sky Wind Power 31	90.0	The Blue Circle	Approved	2026
7	Ubon Ratchathani	Lemon Gold Farm	40.0	Super Energy	Approved	2026
8	Chaiyaphum	Lom Plearn	90.0	Gulf	Approved	2027
9	Chaiyaphum	Wayu Power	78.0	Gulf	Approved	2027
10	Chaiyaphum	Wind Two Power	90.0	Gulf	Approved	2027
11	Kalasin	Wayo Power	36.0	Gulf	Approved	2028
12	Lopburi	Lonrak Green Energy 1	60.0	Gulf	Approved	2028
13	Lopburi	Lonrak Green Energy 2	60.0	Gulf	Approved	2028
14	Ubon Ratchathani	Blue Sky Wind Power 36	90.0	The Blue Circle	Approved	2028
15	Amnat Charoen	Blue Sky Wind Power 39	90.0	The Blue Circle	Approved	2029
16	Amnat Charoen	Blue Sky Wind Power 52	90.0	The Blue Circle	Approved	2029

進行中の風力¹⁾プロジェクト一覧(2/2)

NON-EXHAUSTIVE

Wind power projects, by region

2025

#	Province	Name	Capacity ¹	Developer	Status	Start-up year
17	Amnat Charoen	Gunkul Wind Power 5	90.0	Gunkul	Approved	2029
18	Chaiyaphum	Blue Sky Wind Power 3	76.5	The Blue Circle	Approved	2030
19	Chaiyaphum	Smart Clean System 1	16.0	B Grimm	Approved	2030
20	Nakhon Ratchasima	Gunkul Wind Power 3	90.0	Gunkul	Approved	2030
21	Prachuap Khiri Khan	Lom Singkhon 1	8.0	Sermsang	Approved	2030
22	Prachuap Khiri Khan	Lom Singkhon 2	8.0	Sermsang	Approved	2030
23	Nakhon Si Thammarat	Absolute Clean Water	50-100	The Blue Circle	Approved	2030
24	Nakhon Si Thammarat	Absolute Clean Water 2	50-100	The Blue Circle	Approved	2030
25	Prachinburi	ACWA Power PTT Project	50-100	Gunkul	Approved	2030
26	Prachinburi	ACWA Power PTT Project	0-50	Sermsang	Approved	2030
27	Prachinburi	ACWA Power PTT Project	0-50	Sermsang	Approved	2030
28	Khon Kaen	Advance Asia Power	0-50	B Grimm	Approved	2030

バイオマス発電所一覧（現時点で1か所のみ）

Biomass power plants

No	Project	Province	District/City	Capacity, MW	Owner	Start-up year
1	Pracharat Biomass Mae Lan PP	Pattani	Mae Lan	2.85 ¹	TCPH	2023

Note: 1) Based on power purchase contract

Source: Power Development Plan 2018 (Revision 1), Bioenergy 2023, Arthur D. Little analysis

廃棄物発電プロジェクト一覧(1/5)

Waste-to-energy power projects, totalling 400 MW

#	Name	Province	Quantity offered sell electricity, MW
1. 1 project approved by the cabinet and private sector 20 MW			
1	Waste disposal project for electricity generation Nonthaburi Provincial Administrative Organization (Selected SPP Sic Co., Ltd. and Super Earth Energy Co., Ltd.) 2. Projects approved by	Nonthaburi	20.0
The Minister of Interior and in the process of selecting private sector 12 projects 131.4 MW			
1	Electricity generation project in kiln-type kiln technology Ban Phru Municipality Gas	Songkhla	4.9
2	Plasma technology power generation project Cification, Phan Thong Subdistrict Administrative Organization,	Kamphaeng Phet	6.0
3	RDF Waste-to-energy Power Plant Project, Phan Thong Subdistrict Administrative Organization Phraeksa Mai (PTS 424 feeder line)	Samut Prakan	9.9
4	RDF waste-to-energy power plant project, Provincial Administrative Organization Phraeksa Mai (BTR 416 feeder line)	Samut Prakan	3.0
5	RDF waste-to-energy power plant project, Provincial Administrative Organization Phraeksa Mai (BTR 426 feeder cable)	Samut Prakan	3.0
6	Waste disposal project with an incinerator system of not less than 1,000 tons per day at Nong Khaem Waste Management Center Bangkok Waste	Bangkok	30.0
7	Disposal project with an incinerator system of not less than 1,000 tons per day at On Nut Waste Disposal Center. Bangkok System construction	Bangkok	30.0

廃棄物発電プロジェクト一覧(2/5)

Waste-to-energy power projects, totalling 400 MW

#	Name	Province	Quantity offered sell electricity, MW
8	Project Solid waste disposal phase 2, Nakhon Ratchasima municipality Gasification technology	Nakhon Ratchasima	9.9
9	Power generation project Sawankhalok Municipality	Sukhothai.	2.0
10	Project to generate electricity from solid waste Nakhon Si Thammarat Municipality construction and management project municipal solid waste disposal	Nakhon Si Thammarat	19.8
11	Yala City Municipality	Yala	3.0
12	Waste to electricity project, size 9.9 megawatts of Maha Sarakham Municipality Maha Sarakham Province	Maha Sarakham	9.9
3. Projects under consideration by the screening committee and the Central Committee, 4 projects, 30.3 MW			
1	Garbage disposal project to generate electricity, Nong Ma Mong Municipality Project of	Chai Nat	5.0
2	Waste-to-fueled power plant, Watthana Nakhon Sub-district Municipality	Sa Kaeo	6.0
3	Technology Power Generation Project MBT Biological Treatment Technology Bang Sao Thong Subdistrict Administrative Organization	Samut Prakan	9.8
4	Solid Waste Management Project for RDF and Electricity Generation Chiang Mai Provincial Administrative Organization	Chiang Mai	9.5

廃棄物発電プロジェクト一覧(3/5)

Waste-to-energy power projects, totalling 400 MW

#	Name	Province	Quantity offered sell electricity, MW
4. Projects under preparation Proposal for 39 projects/plans 218.3 MW			
4.1 Central region: 13 projects, 92.2 MW			
1	Garbage disposal project to generate electricity, Tha Tako Subdistrict Municipality	Nakhon Sawan	0.5
2	Garbage disposal project to generate electricity, Hankha Subdistrict Municipality	Chai Nat	1.0
3	Garbage disposal project to generate electricity, Ban Mi Subdistrict Municipality	Lop Buri	0.5
4	Garbage disposal project to generate electricity Tha Chin Municipality Garbage disposal	Samut Sakhon	3.9
5	Project to generate electricity Nadi Sub-district Municipality Garbage disposal	Samut Sakhon	1.5
6	Project to generate electricity Subdistrict Administrative Organization Klong Madua Sub-district, solid	Samut Sakhon	1.0
7	Waste disposal project to generate electricity Phitsanulok City Municipality Waste	Phitsnulok	10.0
8	Disposal project to generate electricity Chiang Rak Yai Subdistrict Administrative	Pathum	30.0
9	Organization, waste disposal project to generate electricity Sukhothai Municipality	Thai	3.0
10	Garbage disposal project to generate electricity Tha Sadet Municipality Garbage disposal	Sukhothai, Suphanbun	9.9
11	Project to generate electricity Subdistrict Administrative Organization Phiapplachal Subdistrict	Suphan Buri	20.0
12	Waste disposal project to generate electricity Phetchabun Municipality 13. Garbage disposal	Phetchabun	3.0
13	Project for electricity generation	Phetchaburi	7.9

廃棄物発電プロジェクト一覧(4/5)

Waste-to-energy power projects, totalling 400 MW

#	Name	Province	Quantity offered sell electricity, MW
4.2 Northern region: 6 projects, 51 MW			
14	Waste disposal project for electricity generation, Si Pho Sri Ngoen Subdistrict Municipality	Chiang Rai	9.8
15	Waste disposal project for electricity generation Chiang Rai City Municipality Solid waste	Chiang Rai	9.8
16	Disposal project to generate electricity Lamphun Provincial Administrative Organization	Lamphun	10.0
17	Solid waste disposal project to generate electricity Wiang Fang Municipality	Chiang Mai	10.6
18	Solid waste disposal project to generate electricity Ban Luang Subdistrict Municipality	Chiang Mai	1.0
19	Solid waste disposal project to generate electricity Phayaman Subdistrict Administrative Organization	Uttaradit	9.8
4.3 Northeastern region, 14 projects, 21.2 MW			
20	Waste disposal project to generate electricity Kut Khao Subdistrict Administrative Organization	Khon Kaen	1.0
21	Solid waste disposal project to generate electricity, Ubonrat Subdistrict Municipality	Roi Et	0.5
22	Solid waste disposal project to generate electricity Roi Et Municipality	Roi Et	1.5
23	Solid waste disposal project to generate electricity Phon Thong Municipality	Roi Et	3.0
24	Solid waste disposal project to generate electricity Ummao Municipality	Roi Et	5.0
25	Solid waste disposal project to generate electricity Electricity Generating Kaset Wisai Municipality	Nong Khai	6.2
26	Waste disposal project to generate electricity Nong Khai Municipality	Nong Khai	0.5
27	Solid waste disposal project to generate electricity. Tha Bo Municipality	Nong Khai	0.5

廃棄物発電プロジェクト一覧(5/5)

Waste-to-energy power projects, totalling 400 MW

#	Name	Province	Quantity offered sell electricity, MW
28	Garbage disposal project to generate electricity Si Chiang Mai Municipality	Nong Khai	0.5
29	Garbage disposal project to generate electricity Soem Sub-district Municipality	Nong Khai	0.5
30	Garbage disposal project to generate electricity Electricity Chumphon Sub-district Municipality	Nong Khai	0.5
31	Garbage disposal project to generate electricity Kut Bong Sub-district Municipality	Nong Khai	0.5
32	Garbage disposal project to generate electricity Pak municipality	Nong Khai	0.5
33	Solid waste disposal project to generate electricity	Nakhon Ratchasima	0.5
4.4 Eastern region: 2 projects, 31.4 MW			
34	Waste disposal project to generate electricity Si Racha Municipality	Chonburi	7.4
35	Solid waste disposal project to generate electricity. Pattaya Municipality	Chonburi	24.0
4.5 Southern region: 4 projects, 22.5 MW			
36	Waste disposal project to generate electricity Songkhla City Municipality	Songkhla	4.6
37	Solid waste disposal project to generate electricity Chumphon Municipality		3.0
38	Solid waste disposal project to generate electricity. Pattani Municipality	Chumphon Pattani	5.0
39	Solid waste disposal project to generate electricity. Phatthalung Municipality	Phatthalung	9.9

タイの AEDP2024ではエタノールやバイオディーゼルの導入目標が大幅に引き下げられ、代わりにSAFなどの新燃料やEV推進に重点が移された

Biofuel provisions for transportation sector

2018 & 2024

Fuel type	AEDP 2018 plan		AEDP 2024 plan	
	mn liters/day	ktoe ¹	mn liters/day	Ktoe ¹
1. Ethanol	7.50	1,396	1.55	289
2. Biodiesel	8.00	2,517	2.46	775
3. Pyrolysis oil	0.53	171	-	-
4. Biomethane	-	-	-	-
5. Other alternative fuels (e.g. SAF)		-	1.85	553
Total		4,085		1,617
Transport sector demand for fuel		40,890		24,890
Biofuels against fuel consumption in the transport sector (%)		9.99		6.50
Biofuels per final energy demand (%)		3.22		1.74

COMMENTS



- Targets in the AEDP 2024 were revised lower after taking into consideration the following:
 - The transportation system development plan from the Ministry of Transport
 - Energy conservation plan in the transport sector
 - Development of electric vehicle technology (which the government is pursuing aggressively)
 - Removal of pyrolysis oil due to lower commercialization potential
 - Promotion of other alternative biofuels such as hydrogen and SAF
- State Oil Fund further reduced subsidies available for biofuels

Note: 1) Thousand tons of oil equivalent

Source: USDA GAIN Thailand Biofuel Annual Report 2024, Arthur D. Little analysis

背景として、BEV普及拡大・鉄道網拡大による需要減少に加え、Oil Fundの大規模赤字が影響（AEDP2018発行時の見立てと比べ、BEV普及・Oil Fundの赤字問題が大きく乖離）

1

Shift towards promoting EV adoption



- The Thai government has intensified its focus on promoting EV adoption, establishing the National EV Policy Committee in 2020
- **Incentives include subsidies ranging from 20,000 to 100,000 THB for EV purchases and tax incentives for EV manufacturers and importers**

2

Expansion of rail transport



- Investments in rail infrastructure, including the **development of double-track railway routes and mass rapid transit systems**, aim to reduce reliance on road transport
- This modal shift is anticipated to decrease overall fuel consumption, including biofuels

3

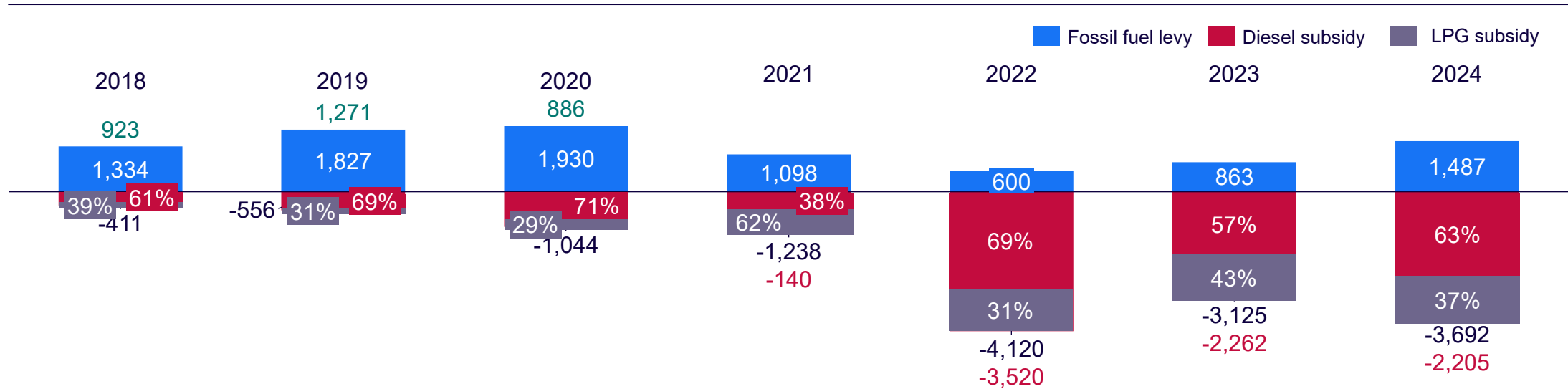
Financial strain on State Oil Fund



- Subsidizing biofuels, particularly biodiesel, placed a **financial strain on the State Oil Fund**, prompting a reduction in biofuel targets to **reduce budgetary pressure**
- As global and domestic palm oil prices surged, the Fund faced mounting deficits nearing 100 billion THB by early 2024

一方タイのOil Fundは、ディーゼル価格の上限価格を設定し、補助金支給をしているため、2022年の燃料価格高騰時に大きく赤字額が膨らんだ状況

Thailand State Oil Fund Balance (Mn USD)



- The significant increase in the fund's deficit over these years is primarily due to the **government's policy of capping diesel prices at 30 baht per liter and maintaining LPG prices at 423 baht per 15-kilogram cylinder** amidst global price fluctuations
- Authorities want to improve the fund's liquidity by **revising its subsidy schemes to focus on groups who desperately need help such as public transport operators rather than universal schemes**
- Energy policymakers are **planning to end the price subsidy program for biofuels, including biodiesel, by 2027** citing market maturity and popularity of biofuels

タイ政府は2026年までにキャッサバとサトウキビの増産を通じてエタノール生産量を日量7.22百万リットルに引き上げ、バイオ燃料の供給拡大を図っている

Potential of cassava and molasses for bioethanol production

2017 – 2019 & 2026

Potential of cassava and molasses	2017	2018	2019	2026
Cassava				
• Target planting area (mn rai)	8.911	8.321	8.721	8.52
• Cassava production (Mt/year) ²	30.491	29.371	31.551	59.52
• Consumption consumption (Mt/year) ²	8.331	10.881	12.272	18.062
• Remaining cassava for ethanol production (Mt/year) ²	3.27	2.72	2.932	5.712
• Ethanol used produce (mn liters/day)	1.43	1.19	1.28	2.50
Molasses				
• Target planting area (mn rai)	9.863	11.183	11.463	164
• Sugar cane yield (Mt/year) ¹	92.953	134.923	130.983	1824
• Molasses for consumption (Mt/year) ²	1.003	1.003	1.003	1.003
• Remaining molasses for ethanol production (Mt/year) ²	2.89	4.48	4.875	7.195
• Ethanol produced (mn liters/day)	2.57	2.87	3.19	4.72
Total ethanol produced (mn litres/day)	4.00	4.06	4.47	7.22

COMMENTS



- Ministry of Energy is pushing to use excess cassava and molasses¹ as a raw material for commercial bioethanol production via the following plans:
- Cassava strategy 2015 – 2026
 - Maintain plantation area while increasing productivity to reach 8.52 mn rai in 2026, an increase in productivity from 3.5 tons/rai/year in 2014 to 5 tons/rai/year in 2019 and 7 tons/rai/year in 2026
- Sugarcane and sugar factory strategy 2015 -2026
 - Expected yield of 182 Mt³ of sugarcane in 2026 from the planting of 10-16 mn rai, where the leftover juice or syrup will be used as bioethanol raw material

タイのバイオディーゼルは生産・消費ともに拡大しており、輸入はほぼゼロで国内生産が需要を賄っている

Biodiesel key metrics

2014 – 2024, mn litres

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024f
Beginning stocks	20	18	24	20	50	50	86	56	35	36	48
Production	1,170	1,250	1,240	1,427	1,567	1,845	1,843	1,658	1,391	1,670	1,770
Imports	12	2	5	2	2	2	1	0	0	0	0
Exports	4	3	16	4	1	21	3	7	9	10	65
Consumption	1,180	1,243	1,233	1,395	1,568	1,790	1,871	1,672	1,381	1,602	1,700
Ending stocks	18	24	20	50	50	86	56	35	36	48	53

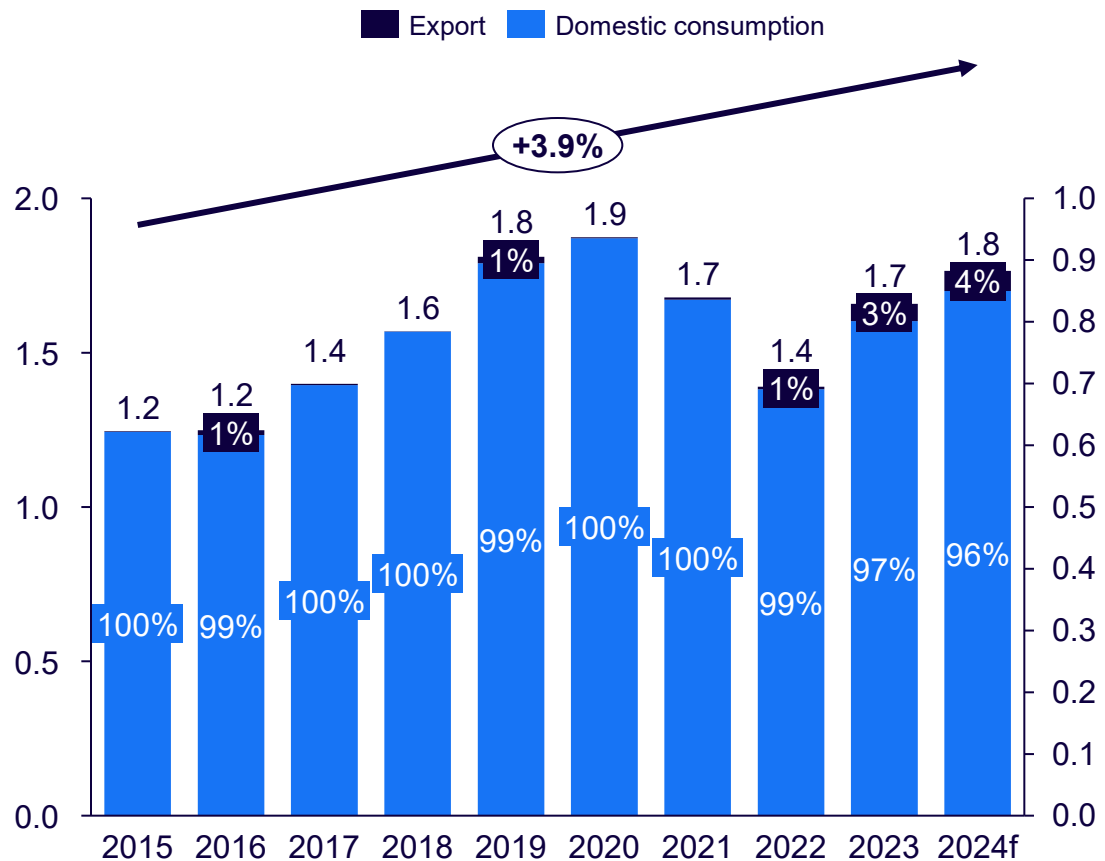
Note: f = forecast

Source: USDA Thailand Biofuel Annual Report 2024, Arthur D. Little analysis

タイのバイオディーゼル消費は2011年以降増加傾向にあるが、政府の混合比率政策や農業・輸出動向に大きく左右され、2023年は義務比率引き上げにより消費が回復した

Biodiesel key metrics and comments

2015 – 2024, Bn tons



- Biodiesel consumption in 2023 increased 16% from the previous year due to the increase in the mandatory blend rates from 5% in 2022 to 6.6% in 2023
- In 2022, total diesel fuel demand declined by 6%, primarily due to decreasing consumption in the on-road transportation and agricultural sectors following a 2.9% reduction in exports and reduced agricultural production caused by drought in 2023
- Blending rate range as of Oct 2023:
 - B7: 6.6 – 7%
 - B10: 6.6 – 10%
 - B20: 6.6 – 20%







Type of Diesel	2019	2020	2021	2022	2023	January-March		% Change
						2023	2024	
B7 ¹	21,852	16,033	14,543	23,317	23,509	5,999	6,271	4.5
B10 ¹	34	5,935	7,028	834	336	97	35	-63.8
B20 ¹	1,631	1,269	360	68	55	15	14	-2.8
Other ¹	1,062	683	1,075	2,444	1,253	765	152	-80.2
Total¹	24,579	23,920	23,005	26,863	25,1535	6,876	6,472	-5.9

Note: 1) Values in million litres

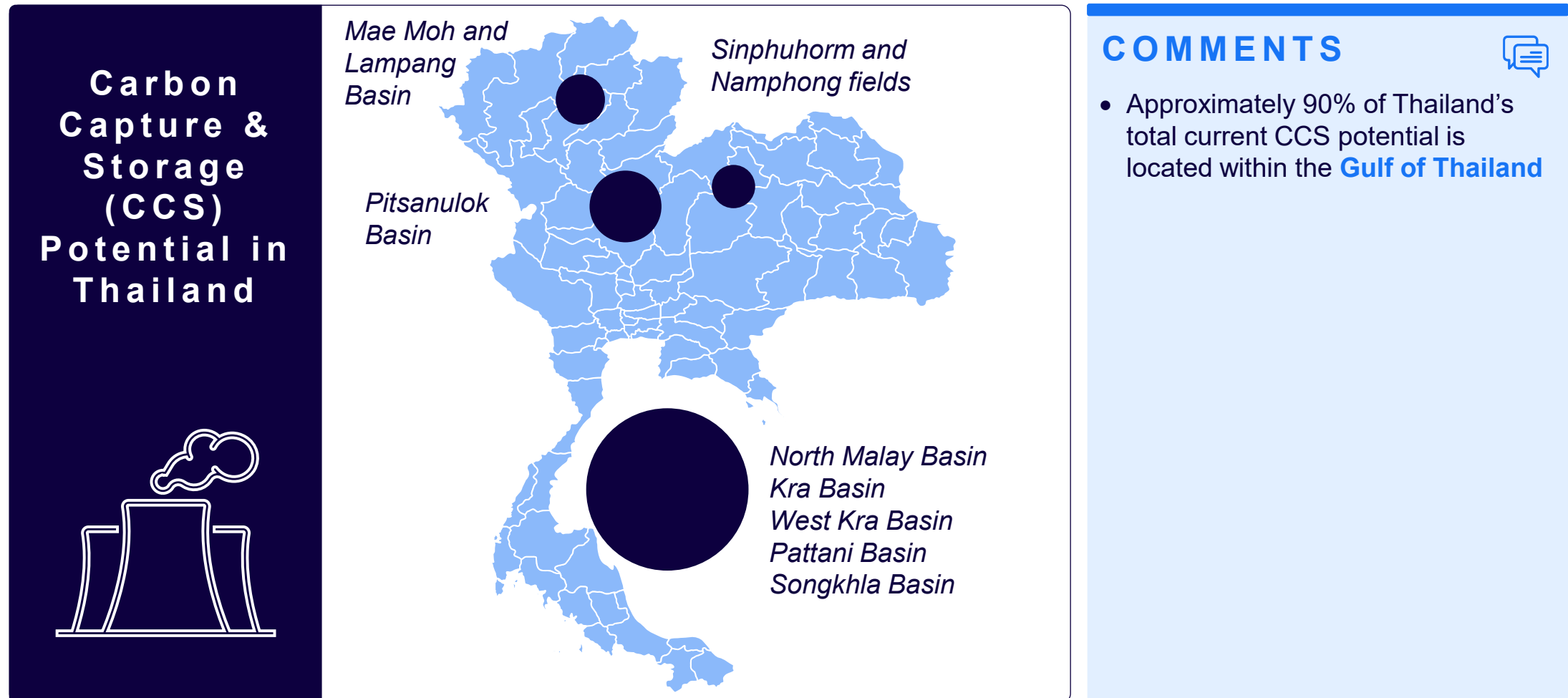
Source: USDA GAIN Thailand Biofuel Annual Report 2024, Arthur D. Little analysis

脱炭素化に向けたバイオマス活用の機運が高まっており、すでに日本とタイの企業間で複数の連携が進められている

Japanese companies' biomass-related initiatives in Thailand

Biomass Firing	Sustainable Aviation Fuel (SAF)	Biogas-to-Hydrogen
		
		
<ul style="list-style-type: none"> • [2024] IHI signed an MOU with Thailand's EGAT at the 6th JTEPD to evaluate wood-based pellet production (using acacia and eucalyptus) and conduct combustion tests at EGAT's Mae Moh Power Plant 	<ul style="list-style-type: none"> • [2022] Sojitz is partnering with PTT to develop sustainable aviation fuel (SAF) from renewable sources • The initiative focuses on optimizing SAF production and supply chains, helping reduce the aviation sector's carbon footprint 	<ul style="list-style-type: none"> • [2023] Toyota, in collaboration with CP, is demonstrating hydrogen production from biogas derived from waste • The project aims to power fuel cell vehicles and support a broader shift toward a hydrogen-based energy system to lower emissions

タイのCO2貯留ポテンシャルは約2.69 GtCO2あり、その約90%がタイ湾に集中している



Note: Map is illustrative and not drawn to scale; 1) Billion tons of CO2
Source: Asia CCUS Network 2023, Asia Clean Energy Forum 2020

タイにおけるCCUSの政策枠組みはまだ発展途上で、規制や事業モデルは開発段階にあるものの、政府の委員会設置や5か年計画を通じて今後段階的に整備・推進される見通し

NON-EXHAUSTIVE

Overview of the CCUS policy landscape

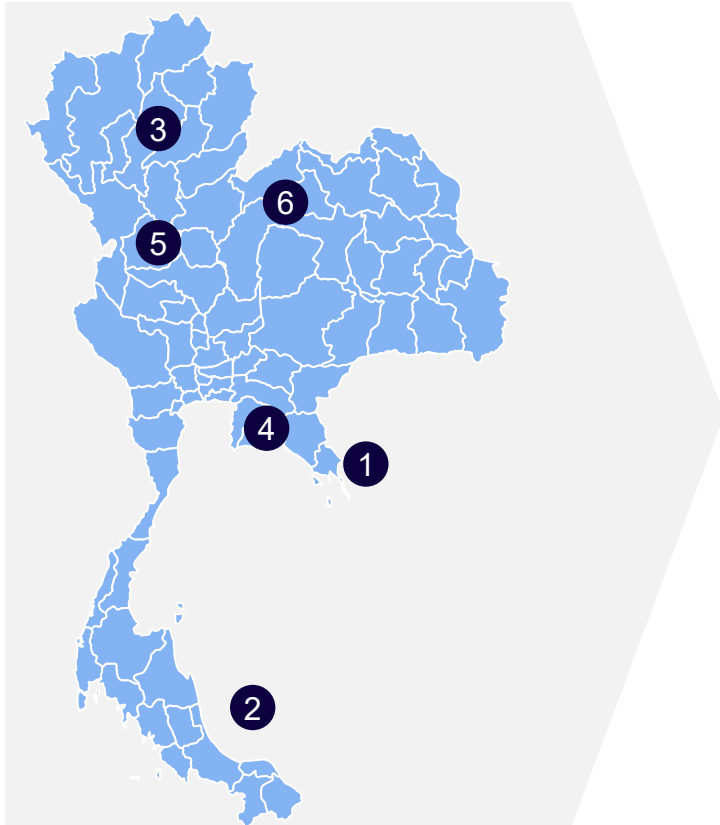
Category	Details	Status
CCS Regulation framework	<ul style="list-style-type: none"> Thailand's Department of Mineral Fuels (DMF) has developed a framework to regulate carbon capture and storage (CCS) and related activities by introducing "carbon business" to the draft amendment to the Petroleum Act B.E. 2514 (1971) 	In development
National Committee on Climate Change Policy	<ul style="list-style-type: none"> Approved the establishment of the Greenhouse Gas Reduction Steering Subcommittee at the 1/2022 meeting, which will steer technology applications for the country's carbon capture, utilization and storage 	Established
5-Year Plan (2022-2027)	<ul style="list-style-type: none"> Focusing on CCUS deployment and development in both upstream and downstream industry The Ministry of Energy will oversee the involvement of national oil companies, utilities, and the private sector in developing a comprehensive CCUS Roadmap 	In development
CCUS business and revenue model	<ul style="list-style-type: none"> Expected to be completed by 2026 Business models are expected to include CCUS installations retrofitted in existing coal-fired power plants and CO2 sinks in depleted reservoirs 	In development

Policy drivers and incentives to drive CCUS deployment in Thailand are **currently nascent**, but are **expected to develop progressively** over the next few years

タイのCCUSプロジェクトは現在6件のみで、大半がまだ「サンドボックス」段階にあり、本格導入はこれからである

Observed CCS projects

As of August 2025



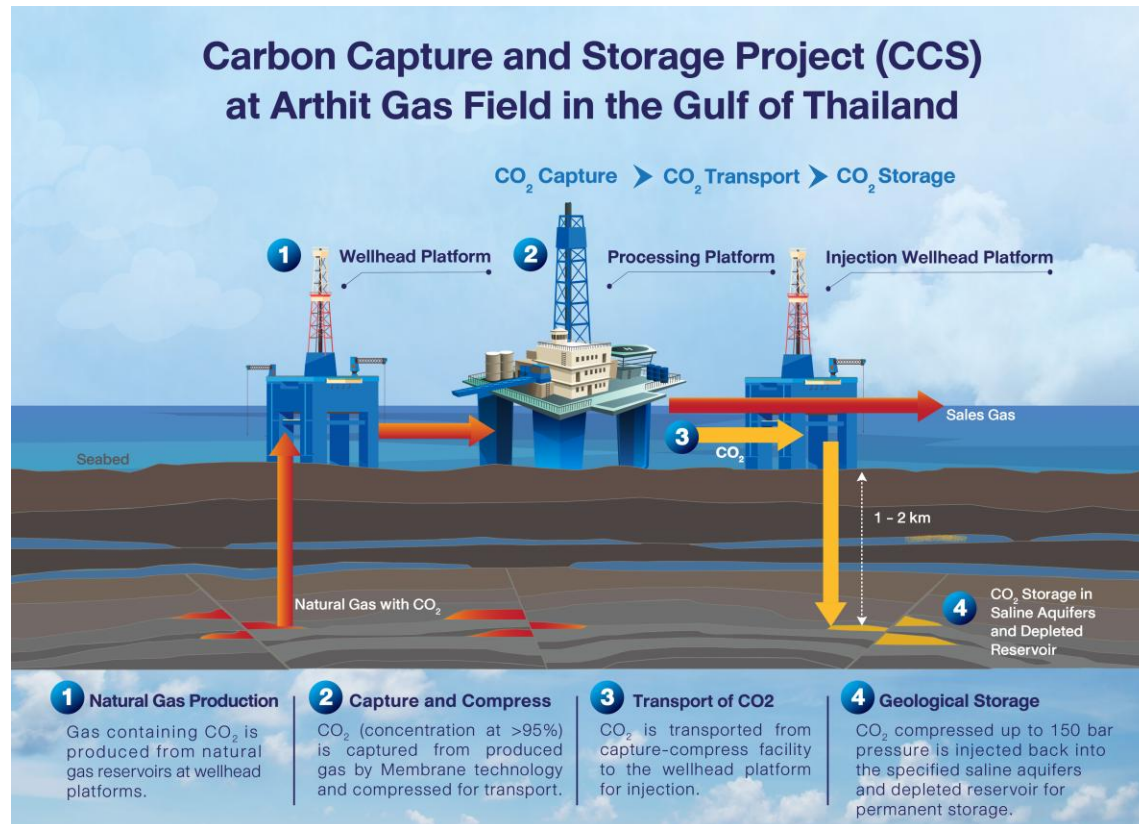
#	Name	Details	Status
1	Northern Gulf of Thailand CCS Study	<ul style="list-style-type: none"> Part of broader push to establish CCS hub in Thailand's Eastern Economic Corridor (EEC) 	Ongoing
2	Arthit Gas Field Pilot Project	<ul style="list-style-type: none"> Preliminary assessment of carbon storage capacity and corresponding development plan completed, alongside the preliminary front-end engineering and design (Pre-FEED) The FEED is underway and PTTEP expects to execute CCS technology at Arthit Field around 2026 	Front-end engineering and design in development
3	Mae Moh Lampang CCS Project	<ul style="list-style-type: none"> Led by EGAT to evaluate CO2 storage capacity in Lampang 	Ongoing
4	BLCP Pilot Project	<ul style="list-style-type: none"> Still under its initial phase of development The Thai government is collaborating with the Japanese government to scale up methane production 	Under discussion
5	S1 Pilot Project	<ul style="list-style-type: none"> Under discussion with EGAT and PTTEP on potential collaboration 	Under discussion
6	Phu Horm Pilot Project	<ul style="list-style-type: none"> Final investment decision expected in late-2023 	Under discussion

Note: Map is illustrative and not drawn to scale

Source: Asia CCUS Network 2023, PTTEP, Energy Voice 2022

PTTEPは2021年にタイ初のCCSプロジェクトをタイランド湾のArthitガス田で開始し、2026年頃の技術導入を目指しており、年間約70～100万トンのCO₂削減を目標としている

Arthit Gas Field CCS pilot project



Background

Initiated in 2021, to reduce PTTEP's emissions from its petroleum production process in the Gulf of Thailand

Current status

Feasibility studies completed, with front-end engineering and design underway. Technology deployment is presently expected around 2026

Targets

Targeted reduction in carbon dioxide emissions by approximately 700,000 to 1,000,000 tons per annum

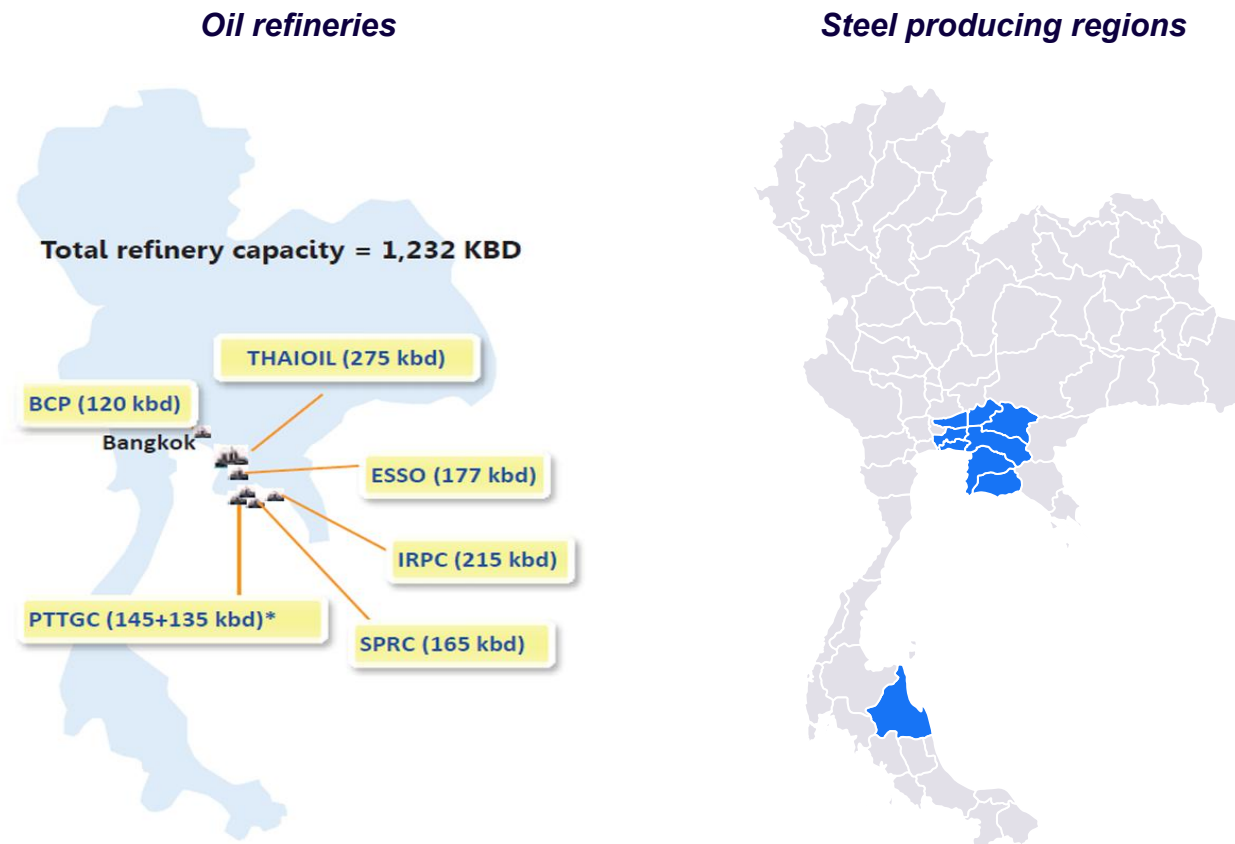
PTTEPはタイにおけるCCUS分野で積極的に共同研究やパートナーシップを進めており、国内外の大学・研究機関、PTTグループ企業、日本企業（INPEX、JGC）などと連携

Observed PTTEP CCS collaborations

<p>April 2024</p>	<p>CCUS development academic network</p>	<ul style="list-style-type: none"> • PTTEP and the Asian Institute of Technology (AIT) signed a Memorandum of Understanding under the “PTTEP Subsurface University Energy Connect” initiative to drive the development of Carbon capture and storage (CCS) • This collaboration is part of a broader academic network—encompassing institutions like Chulalongkorn University, Chiang Mai University, Khon Kaen University, Mahidol University, Kasetsart University, the Synchrotron Light Research Institute, and Suranaree University of Technology
<p>July 2022</p>	<p>CCUS Technology Development Consortium</p>	<ul style="list-style-type: none"> • PTTEP jointly announced the establishment of Thailand’s CCUS Technology Development Consortium led by the Bio-Circular-Green economy Technology & Engineering Center (BCGeTEC), Faculty of Engineering, Chulalongkorn University • The consortium will build a collaborative network for the study and development, and utilization of CCUS technology in Thailand
<p>June 2022</p>	<p>PTT Group CCS Partnership</p>	<ul style="list-style-type: none"> • PTTEP announced a partnership with companies in the PTT Group to conduct a feasibility study on the application of CCS under the concept of CCS Hub Model • The study started off in PTT Group’s nearshore operational sites in Rayong and Chonburi provinces, targeted to reduce the emissions of the Group and nearby industries
<p>April 2022</p>	<p>International CCS Partnership</p>	<ul style="list-style-type: none"> • PTTEP announced a CCS partnership with INPEX CORPORATION and JGC Holdings Corporation from Japan, who have experience in CCS project development • The partnership will explore the potential development of a CCS project in other areas of Thailand that will help reduce greenhouse gas emissions emitted by other industries

タイの製油所と鉄鋼生産拠点は主にバンコク首都圏およびチョンブリ・ラヨン県など中部地域に集中しており、これは商業・工業港湾インフラの存在が大きな要因

Oil refineries and key steel producing regions in Thailand



COMMENTS



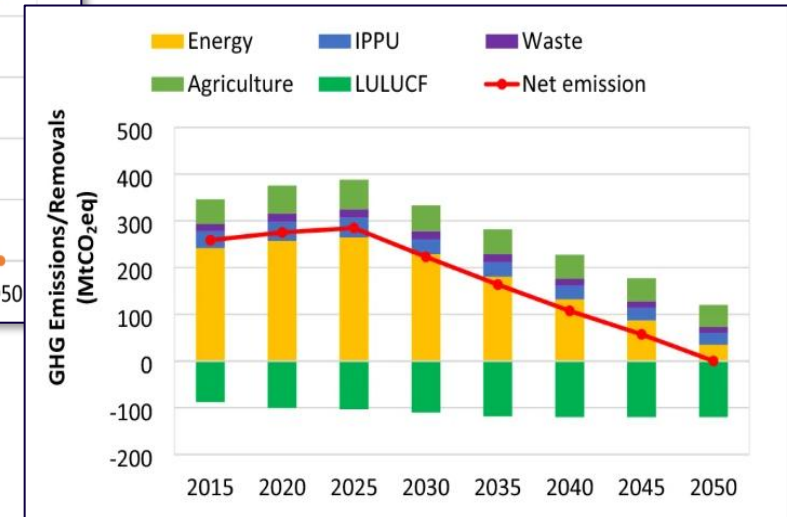
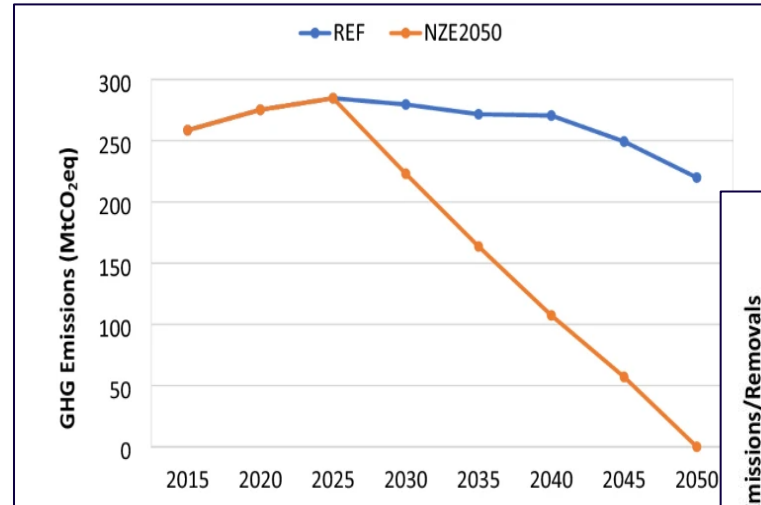
- Oil refineries and steel producers/mills also appear concentrated within **Central Thailand** – such as the Bangkok Metropolitan Area and Chonburi/Rayong Provinces
- This is likely due to the presence of **well-developed port infrastructure** in the region, with a number of commercial and industrial ports, such as:
 - Bangkok Port
 - Laem Chabang Port
 - Map Ta Phut Industrial Port

タイは現在、2065年をネットゼロの確定年とし、条件付きで2030年の排出量を25%削減すると発表しており、GHG排出のピーク

GHG Emission Trends

- **Update:** From 2021, Thailand has announced a **definitive CN year of 2050 and GHG zero emission of 2065** compared to previously giving a year range of 2065-2070
- Peak emission year remains **2030 at 444 Mt CO₂e**
- **Update:** Peak emission year value may be further reduced by **5% (25% in total)** provided conditional support is extended
- Conditional support relates to access to technology development, transfer, financial resources, and capability building support by developed market
- **No official GHG reduction schedule beyond 2030 up to net zero year**
- As a result, **ambiguity remains** about the seriousness and **position of Government**

GHG Emission Levels



タイは補助金や税制優遇措置で代替エネルギー導入を促進しつつ、排出権取引制度や規制によって再エネ利用拡大や省エネ基準強化を進める政策を展開している

GHG Target Action		Detail
アメの政策	助成金	<ul style="list-style-type: none"> Subsidy is provided to alternative energy (biofuel and solar PV) to boost alternative energy adoption
	税制優遇措置	<ul style="list-style-type: none"> Mainly for transport sector, via tax incentives for EV production and consumption
ムチの政策	排出権取引制度 (ETS)	<ul style="list-style-type: none"> Initiated in 2007, carbon credit trading is currently under pilot program which participation is voluntary basis ETS policy development is commerce
	罰則	<ul style="list-style-type: none"> No carbon pricing regulation, current program is for voluntary basis
	規制	<ul style="list-style-type: none"> Mandates to increase renewable energy in power generation and limit new coal fire power plant Regulates new building and machinery/transport equipment with higher energy standard

発電では2040年約68%の再エネ比率、輸送では、生産の約30%をZEV化と野心的な目標を掲げる(産業に関するアクションへの言及は限定的)

More detail in following page

Industry	CN Target	Detail
Electricity/ Heat	<ul style="list-style-type: none"> 72 MT-CO2e reduction in 2030 	<ul style="list-style-type: none"> 発電（電気と熱）における再生可能エネルギーの比率を高め、2037年に総発電容量の30%を目指していたが、総発電に占める再エネ比率を68%とさらにアグレッシブな目標に引き上げ エネルギー最適化目標（建物・工場設計、機械設備）の設定を実施
Transportation	<ul style="list-style-type: none"> 41 MT-CO2e reduction in 2030 	<ul style="list-style-type: none"> 炭素排出量に基づく自動車税の設定 2030年にゼロエミッション車（ZEV）の生産台数を全自動車生産台数の30%と設定（FCV何パーセントとの記載は無し）
Industry	Cement	N/A <ul style="list-style-type: none"> CCUSや再生可能エネルギーを採用するセメント会社に対する輸入関税の免除 セメント製造におけるクリンカ使用量の削減
	Steel	N/A <ul style="list-style-type: none"> タイは、鉄鉱石からの鋼板製造プロセスがない BCG政策による再利用、リサイクルの奨励
	Chemical	N/A <ul style="list-style-type: none"> 税制優遇、研究開発プロジェクトへの資金提供など、バイオケミカル製品の普及促進 税制優遇措置により再生プラスチックペレットの利用促進
Other	N/A <ul style="list-style-type: none"> 産業全体として、熱利用においてはバイオ燃料や電化+再エネが重要と想定 炭素クレジット市場（タイ自主排出削減プログラム（T-VER））の試行実施 ✓ 2022年、タイで炭素税を導入するための調査を物品税局が開始 	

1 – Energy usage includes energy generation and consumption e.g. from manufacturing industry

出所： Ministry of Natural Resources and Environment, Department of Alternative Energy Development and Efficiency

特に国家エネルギー計画は、タイがクリーンエネルギーに移行し、二酸化炭素排出量を削減することを支援する政策で、RE/ZEVの導入を掲げている

National Energy Plan (NEP) Framework

NEP covers targets and actions to reduce GHG emission in energy sector, ranging from electricity sources to fuel for vehicles



RE >50% with ESS

More than half of electricity generated to be from renewable energy which will be used together with battery. There are 4 key actions:

- Lower RE price
- Lower ESS cost
- Smart Grid development
- Distributed energy resource



EV 30@30

Drive EV industry by:

- Increasing production of ZEVs to at least 30% by 2030
- Developing infrastructure including charging stations and battery



EE >30%

Increase energy efficiency (EE) to >30% by using energy efficient technology. Focus on 5 key sectors:

- Industrial
- Commercial
- Residential
- Agriculture
- Logistics



4D1E

Policy which involves

- Decarbonization
- Digitalization
- Decentralization
- De-regulation
- Electrification

CNソリューションとしては発電において再エネ比率が68%(2040年時点)と注力度が高く、産業の熱利用においてはバイオ燃料と電化への注力度が高い

Long-term mitigation actions in key sectors

SELECTED

	2025	2030	2035	2040	2045	2050	2055	2060	2065
Power generation	<ul style="list-style-type: none"> Efficiency improvement in powerplants Use of RE Phase out of oil powerplant 	<ul style="list-style-type: none"> Solar/ wind with battery storage 		<ul style="list-style-type: none"> Phase down of coal plants 68% share of RE electricity CCS, CCU and BECCS 		<ul style="list-style-type: none"> Combined cycle NG 74% share of RE electricity Phase out of coal plants 		<ul style="list-style-type: none"> Close to 100%% RE electricity Large-scale green hydrogen-to-power 	<ul style="list-style-type: none"> 100% carbon-free electricity (RE+H2+ nuclear)
Transport	<ul style="list-style-type: none"> Efficient engine vehicle (gasoline/ diesel) RE (E10, E20, E85, B10, B20) Electric train 	<ul style="list-style-type: none"> Phase down of ICE EV 30@30 			<ul style="list-style-type: none"> Most efficient ICE with biofuels High share of EV FCEV 	<ul style="list-style-type: none"> 100% of new vehicle sales are EV or FCEV 	<ul style="list-style-type: none"> Phase out of ICE vehicles 100% EV adoption 	<ul style="list-style-type: none"> Strong reliance on SAF in aviation Widespread green ammonia 	<ul style="list-style-type: none"> Entirely zero-emission
Mfg. industries/ IPPU	<ul style="list-style-type: none"> Efficient boiler/ utility tech RE (bioenergy) Clinker substitution Substitution of refrigerant 	<ul style="list-style-type: none"> Most efficient boiler/ utility tech RE (bioenergy) 	<ul style="list-style-type: none"> Electric heating tech 	<ul style="list-style-type: none"> CCS in cement industry 	<ul style="list-style-type: none"> Green hydrogen fuel (to replace fossil fuel for hard to abate sectors such as steel, cement, etc.) 	<ul style="list-style-type: none"> Most efficient electrical devices/ boiler RE (bioenergy) 	<ul style="list-style-type: none"> Full electrification of heating and boilers 		<ul style="list-style-type: none"> Hard-to-abate emissions fully offset by CCS and carbon sinks

IPPU – Industrial Processes and Product Use, RE – Renewable Energy
 出所：Thailand’s Long-Term Low Greenhouse Gas Emission Development Strategy (Revised)

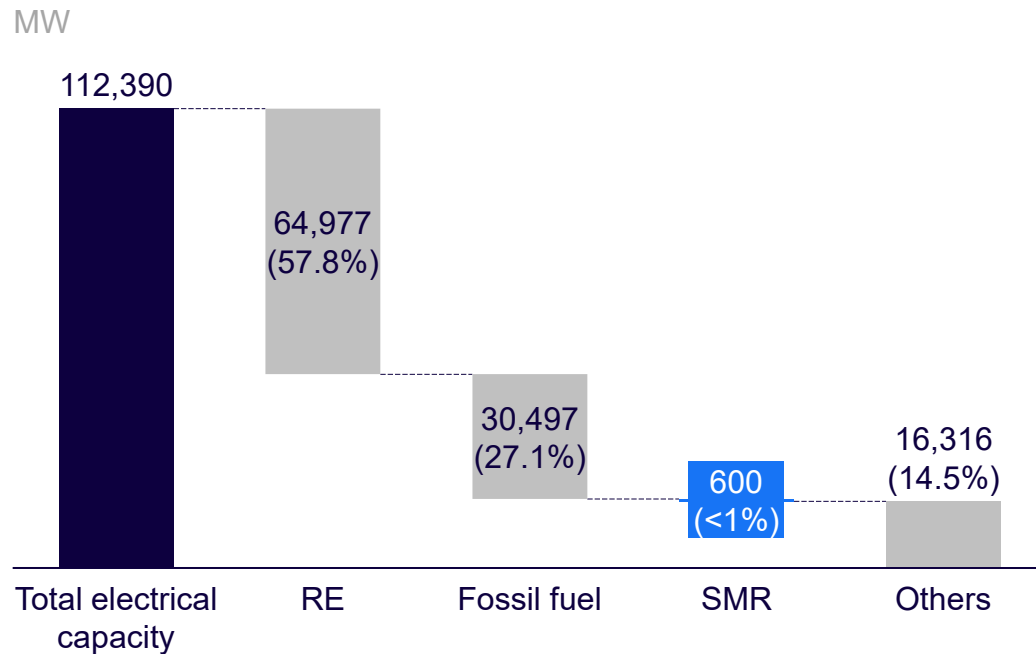
Actions involving hydrogen are highlighted in blue

一方で脱炭素の文脈では種々アクションが定義されており、REの文脈で水素にも注目され始めている

	Decarbonization	Digitalization	Decentralization	Deregulation	Electrification
Electricity	<ul style="list-style-type: none"> Build new clean fuel plant Retire fossil fuel power plant Develop CCUS Increase power generation efficiency Reduce share of coal Promote RE/Clean energy Promote power trading with neighboring countries 	<ul style="list-style-type: none"> Develop Grid Modernization Develop Smart Grid (Energy Management System and Smart Meter) Develop Virtual Power Plant e.g. Demand Respond and V2G Develop load forecasting for power system planning 	<ul style="list-style-type: none"> Develop flexible IPS management system Develop Smart Micro Grid Develop Grid Modernization Develop Smart Grid RE+ESS Develop power infrastructure 	<ul style="list-style-type: none"> Promote Peer-to-Peer and Net Metering Electricity market Liberalization Power trading with neighboring countries Restructure electricity pricing Third Party Access in power sector Promote Wheeling Charge system 	<ul style="list-style-type: none"> Promote EV/EV Charging Station Promote ESS Electricity management to support EV Electrify rail and public transport
Oil & Gas	<ul style="list-style-type: none"> LNG management Promote the use of LNG in Industry and transportation Upgrading refinery standard EURO 5-6 Management of LPG and NGV Promoting the proper use of Biofuel in the transport sector 	<ul style="list-style-type: none"> Develop a system for evaluating potential and regulating petroleum resources. Develop a system to control, supervise and collect fuel information. 	<ul style="list-style-type: none"> Develop Gas Infrastructure (Piping and rail system, LNG receiving terminal) Develop Oil Infrastructure (Oil depots, oil pipelines, rail transport) 	<ul style="list-style-type: none"> Gas market liberalization Efficient management of offshore and onshore gas Restructure gas pricing Regulate pipe safety Restructure oil pricing Biofuel Cost Management Regulate pipe safety 	<ul style="list-style-type: none"> Management of the fuel industry to support Evs Change the use of LPG stoves to electric stoves
RE	<ul style="list-style-type: none"> Manage electricity generation from RE R&D Hydrogen Promote investment in RE technology market 	<ul style="list-style-type: none"> Set up a Data Platform and develop a RE Control Center data center. 	<ul style="list-style-type: none"> Develop Microgrid Develop RE at the community level to improve farmers' lives and the basic economy 	<ul style="list-style-type: none"> Promote RE trading and P2P Develop carbon credit mechanism Determine RE purchase price Develop biomass market for electricity and heat generation 	None
EE	<ul style="list-style-type: none"> Evaluate new potential, increase EE targets Green Industry Increase EE in homes, buildings and industrial plants. Promote investment in EE technology market 	<ul style="list-style-type: none"> Promote Smart Energy Management system Develop Digital Platform for energy conservation Develop EV Data Platform 	<ul style="list-style-type: none"> Develop Infrastructure (Charging station) to support the use of EV 	<ul style="list-style-type: none"> Determine the government's ESCO measures Establish compulsory measures Use market mechanisms to promote energy conservation Enforce energy conservation benchmarks for energy producers 	None

タイは2基の小型モジュール炉（SMR）を導入する計画を検討しており、EGATによる建設・運営の可能性はあるが、費用超過や放射線リスクへの懸念も指摘されている

Nuclear power target (2037)



Current situation

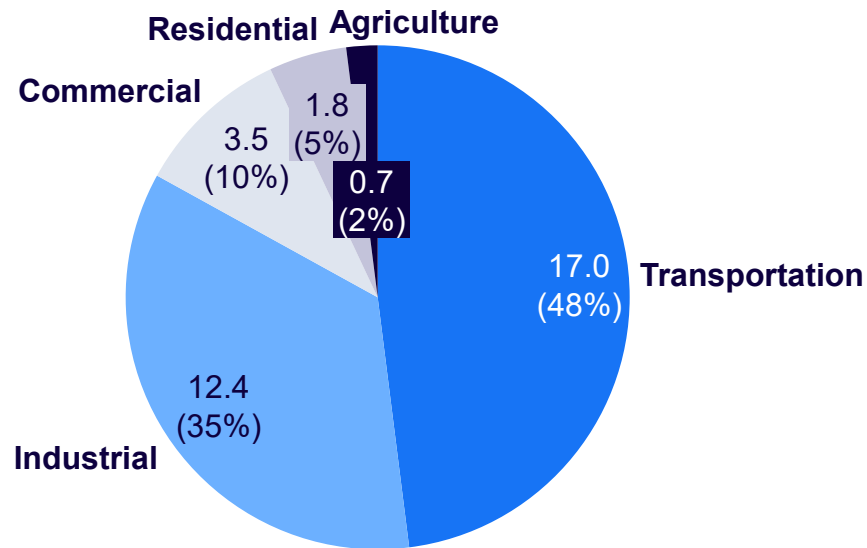
- According to the PDP (draft) spanning 2024 to 2037, **two SMRs, each with a capacity of 300 MW**, are planned for development and are expected to begin operations near the end of the implementation period
 - These SMRs may be built and operated by EGAT
- Following public consultations on nuclear energy in 2024, concerns have been raised about health and safety standards
- The government is preparing guidelines for SMR development in Thailand entailing site selection, policy and legal framework and regulatory oversight etc.

Despite key concerns regarding cost overruns and radiation hazards, Thailand remains committed to its installation of two SMRs as part of PDP 2024 with next steps being preparing and developing guidelines in accordance with IAEA

「エネルギー効率計画2022（EEP 2022）は、2010年水準と比較して、2037年までにエネルギー消費を36%（約5,230万トン石油換算）削減することを目指している NON-EXHAUSTIVE

Total Energy Conservation Targets by Sectors¹

Unit: Mtoe (million tons of oil equivalent)



Selected Enabling Mechanisms

Regulations and Code

- Building energy codes, mandatory energy management for designed facilities, transport compliance

Standards and Labelling

- MEPS and “Label No. 5” to life appliance / equipment efficiency

Fiscal and Financial

- CO2-based vehicles excise; rebates/soft loans/accelerated depreciation for EE

Program and Operations

- Utility Energy Efficiency Resources Standard (EERS), demand response/time-of-use, industrial audits & process optimization

Tech Enablers & Others

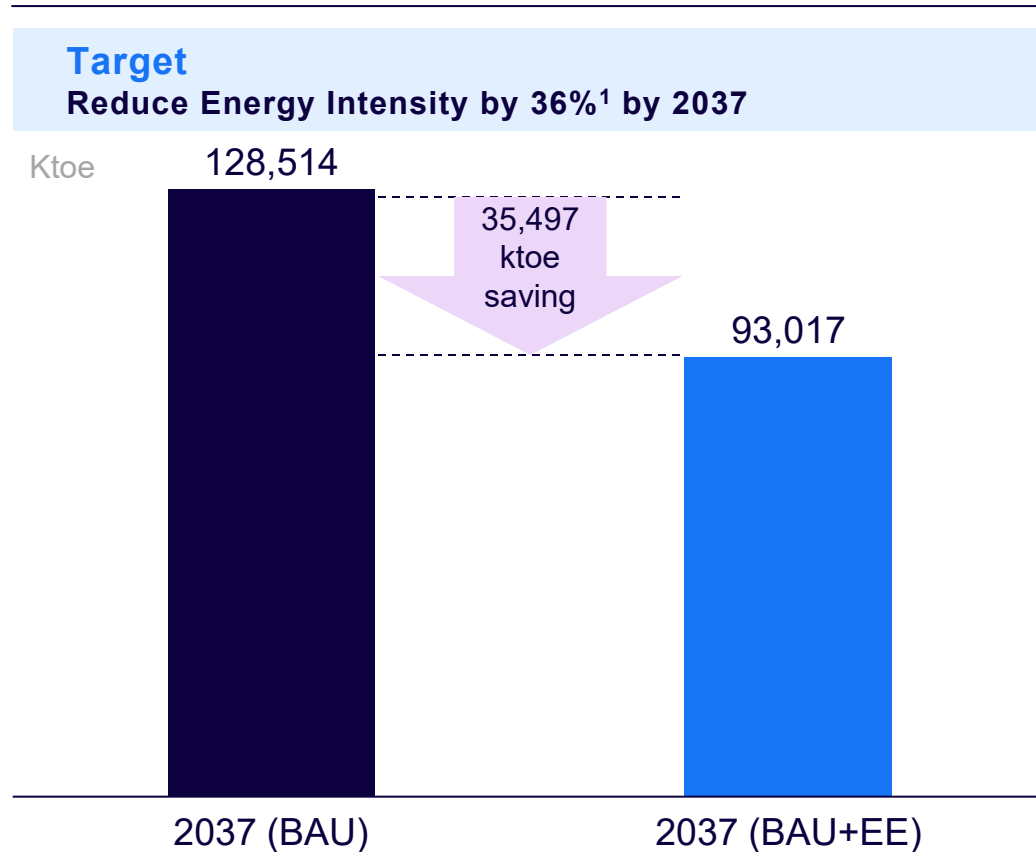
- Smart IoT/AI controls, training/awareness, R&D/pilots

Transportation and industrial are primary focuses of Thailand’s energy conservation efforts.

Note: (1) As indicated by the draft Energy Efficiency Plan 2022 (EEP 2022)
Source: Energy Efficiency Plan 2018, Arthur D. Little Analysis

タイは2037年までにエネルギー強度を36%削減する目標を掲げ、建築物の省エネ基準、スマート農業支援、省エネラベル制度、設備更新への直接補助金などの政策を展開

Energy efficiency (EE) target



Government policies

Policy	Details	Target industry
Building Energy Code (BEC)	New or retrofitted buildings being constructed which have area equal to 2,000 m ² or more must be designed under energy conservation requirements	Construction/Real Estate
Smart Farm	Subsidy to change/improve equipment/machinery for higher efficiency, to use RE technologies application and apply farm management technologies	Agriculture (Poultry, Dairy, Pig farming, aquaculture)
Standard and labelling	Energy efficiency labels and certification marks are applied to construction, agricultural, industrial, and home products to promote informed consumer choices.	Construction, Agriculture, Industrial, Consumer Goods
Direct Subsidy	Direct subsidy for stakeholders to change/improve equipment and machinery for higher efficiency	Manufacturing, Agriculture, Commercial

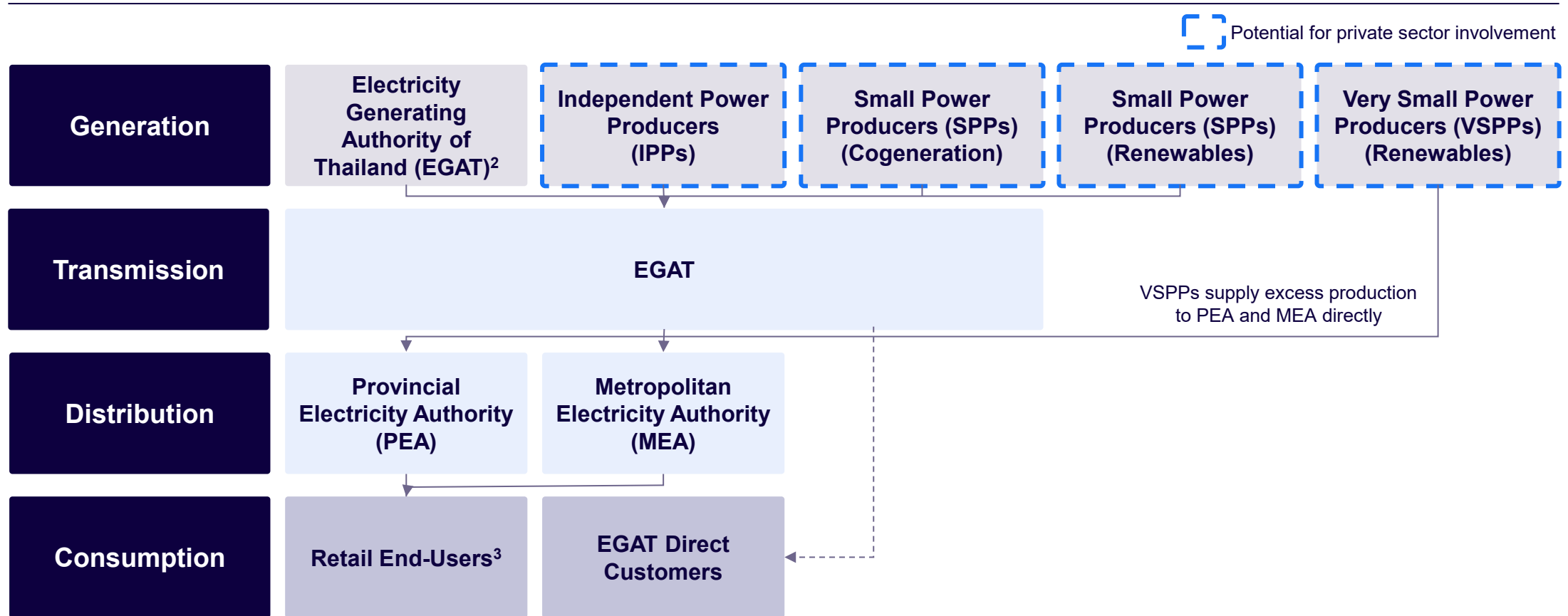
Note: 1) Relative to 2010 (baseline)
Source: EEP 2024 (Draft), Arthur D. Little analysis

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1. エネルギー構成・政策・監督機関
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3. パイプライン（ガス・石油）
4. 次世代・再生可能エネルギー
- 5. 発電事業者**
6. 発電所
7. 電力品質
8. 送電網
9. 電気料金
10. 電力需給状況

タイでは発電部門の自由化は進んでいる一方で、送配電網は依然としてEGAT・PEA・MEAが独占的に管理している

Thailand's Electricity Supply Chain¹



Note: 1) The generation, transmission, and distribution phases are highly regulated by the Government; 2) Includes imports of electricity purchased by EGAT, from overseas supply sources;

3) SPPs and VSPPs are permitted to generate electricity for their own consumption

Source: Krungsri Research, Arthur D. Little analysis

タイの発電はEGAT、IPP、SPP、VSPP、輸入の5カテゴリに分かれている

Power Generation Capacity by Categories

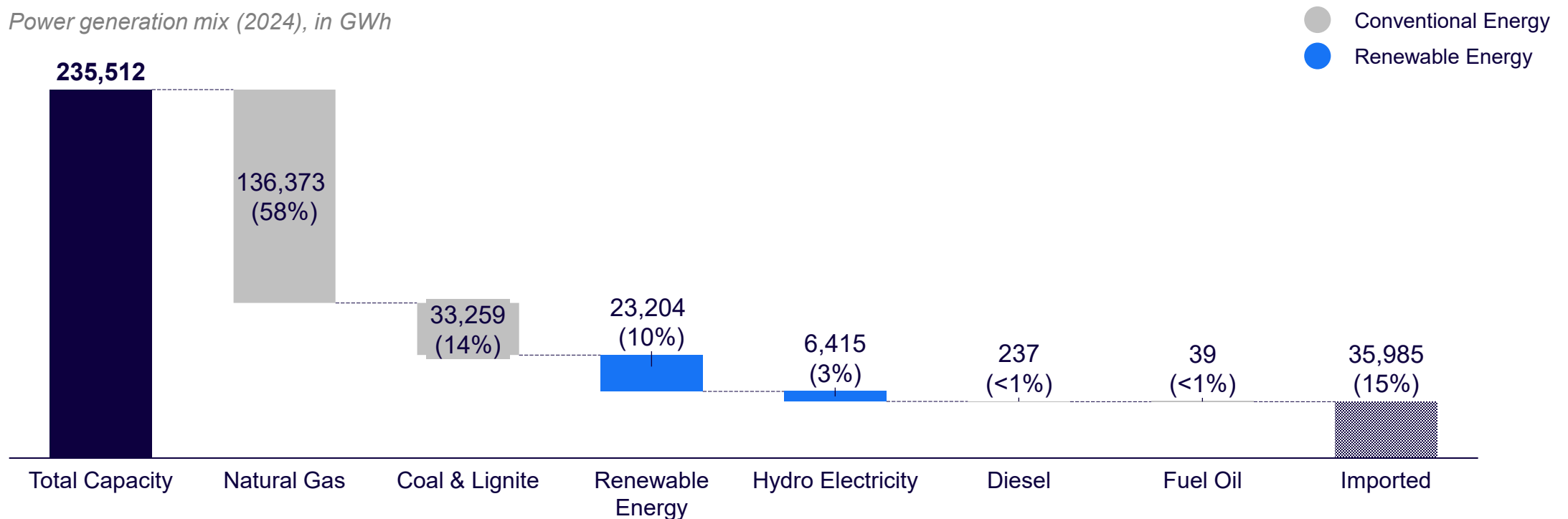
1	Electricity Generating Authority of Thailand (EGAT)	<ul style="list-style-type: none"> • State-owned EGAT acts as both a producer and a purchaser of energy • Purchases power from overseas sources and private-sector IPPs and SPPs, before distribution • Has a monopoly over the transmission of electricity in Thailand
2	Independent Power Producers (IPPs)	<ul style="list-style-type: none"> • Total installed generating capacity to qualify: Over 90 MW • Mainly use natural gas and coal to fuel power stations, signing long-term power supply contracts with EGAT • Major players include Ratchaburi Electricity Generating Holdings, Gulf JP NS, and Gulf Power Generation
3	Small Power Producers (SPPs)	<ul style="list-style-type: none"> • Total installed generating capacity to qualify: 10 – 90 MW • (i) ‘Firm’-type SPPs have a 20-25-year EGAT contract and are normally fueled by natural gas or coal • (ii) ‘Non-firm’ SPPs have 5-year extendable contracts and are normally fueled by renewables
4	Very Small Power Producers (VSPPs)	<ul style="list-style-type: none"> • Total installed generating capacity to qualify: Under 10 MW • Typically generate electricity from renewables (including solar, wind, hydropower, biomass, biogas and waste) • Mainly for self-consumption, with surplus production sold to MEA¹ or PEA¹ at feed-in tariff (FiT) rates
5	Energy Imports	<ul style="list-style-type: none"> • Often from neighboring countries, including Laos, Malaysia, and China

Note: 1) Metropolitan Electricity Authority (MEA) and the Provincial Electricity Authority (PEA), both state-owned and closely linked to EGAT
 Source: Energy Policy and Planning Office (EPPO), Electricity Generating Authority of Thailand (EGAT), Krungsri Research, Arthur D. Little Analysis

タイの電源構成は天然ガスが約58%と最大シェアを占め、石炭・褐炭が14%、輸入電力が15%を占める一方、再生可能エネルギーは約10%、水力は約3%とまだ限定的

Power Generation Mix

Power generation mix (2024), in GWh



Natural gas currently comprises 57.9% of Thailand's power generation mix, with coal & lignite at 14.1%, and imports and NRE¹ at 25.1%. Hydro electricity alone contributes to ~2.7% of the total power generation mix.

Notes: (1) Renewable Energy is inclusive of solar, wind, waste, biogas, etc.
Source: Energy Policy and Planning Office (EPPO), Arthur D. Little analysis

タイの電力供給を担うEGATは、全国で54の発電所を運営し、IPP・SPPや周辺国からの電力購入、送電を行いながら、子会社・関連会社を通じ国内外で発電・インフラ事業を展開

EGAT Core Business Operations

1 Electricity Generation

- EGAT operates **54 power plants nationwide** with a combined installed capacity of **16,261 MW** (2024)

2 Electricity Purchase

- It purchases bulk electricity from 13 **IPPs** (9,598.5 MW), **SPPs** (9,319.88 MW), and **imports** from Laos/Malaysia (6,234.9 MW)

3 Electricity Transmission

- As of 2024, **EGAT's transmission network** spanned 40,041.087 circuit-km, with **239 substations** and a total transformer capacity of 145,149.63 MVA
- EGAT's transmission network operates at **500, 230, 132, 115, and 69 kV**, supplying power **directly to customers** as well as to **MEA** and **PEA** for nationwide retail distribution


EGAT Subsidiaries and Affiliates

Company	Ownership	Status	Summary
RATCH Group Pcl.	45.00%	Subsidiary Company	Investment in the electricity generation and infrastructure development sphere
EGAT International Co., Ltd.	99.99%	Subsidiary Company	Represent EGAT in overseas investment in order to acquire electricity back to Thailand
EGAT Diamond Service Co., Ltd.	45.00%	Subsidiary Company	Provide refurbishment work for the hot gas path parts of gas turbine in 18 countries
Electricity Generating Pcl. (EGCO)	25.41%	Associated Company	Conduct electricity and energy-related generation and business in Thailand and abroad
District Cooling System and Power Plant Co., Ltd.	35.00%	Joint Venture	Generate and sell electricity and cooling water to the Suvarnabhumi International Airport
INNOPOWER Company Limited	40.00%	Joint Venture	Develop and make commercial use of research and innovations, as well as invest in future energy
InnoSpace (Thailand) Company Limited	11.98%	Investment	Promote and develop Thai Start-ups to mobilize domestic economic development
PE LNG Co., Ltd.	50.00%	Joint Venture	Supports liquefied natural gas unloading, storage, and regasification,


タイの発電事業者はERC規制により、外国資本の持株比率が49%に制限され、取締役・株主の50%はタイ人である必要があり、実質的にタイ資本がマジョリティを維持する仕組み

NON-EXHAUSTIVE

General qualifying criteria for power generation companies



คณะกรรมการกำกับกิจการพลังงาน
Energy Regulatory Commission



สำนักงานคณะกรรมการ
กำกับกิจการพลังงาน

ERC Regulation on
Qualifications, documents and
procedures for obtaining
electricity business license

➔

Category	Details
General qualifying criteria	<ul style="list-style-type: none"> Applicants must be corporate entities registered in Thailand and foreign shareholding is limited to 49% At least 50% of the applicant company's directors and shareholders must be Thai. Directors authorized to bind the company must all be Thai Power producers must always maintain the above qualifications
Potential exemptions	<ul style="list-style-type: none"> Exemptions from the foreign shareholding and director requirements are possible for companies under international agreements or under other law However, in practice, the availability of exemptions is likely to be limited
Minimum capital requirements	<ul style="list-style-type: none"> For current power purchase agreements under the FiT scheme, a minimum capital requirement of USD ~62¹ per kW of capacity is imposed

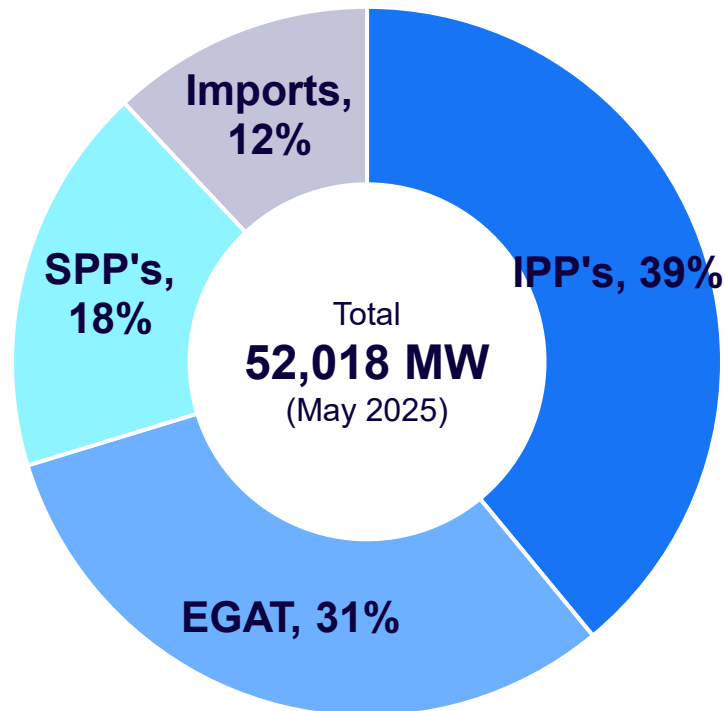
Hence, most power generation firms in Thailand fall under **local-majority ownership and decision-making control**

Note: 1) Exchange rate is 1 THB = 0.031 USD
 Source: Nishimura & Asahi, Norton Rose Fulbright, Tilleke & Gibbins, Watson Farley & Williams, Arthur D. Little analysis

2025年時点でタイの発電市場シェアはIPPが39%と最大で、EGATの31%を上回り、SPPが18%、輸入電力が12%を占めている

Market Share in Terms of Installed Generating Capacity

May 2025



Description



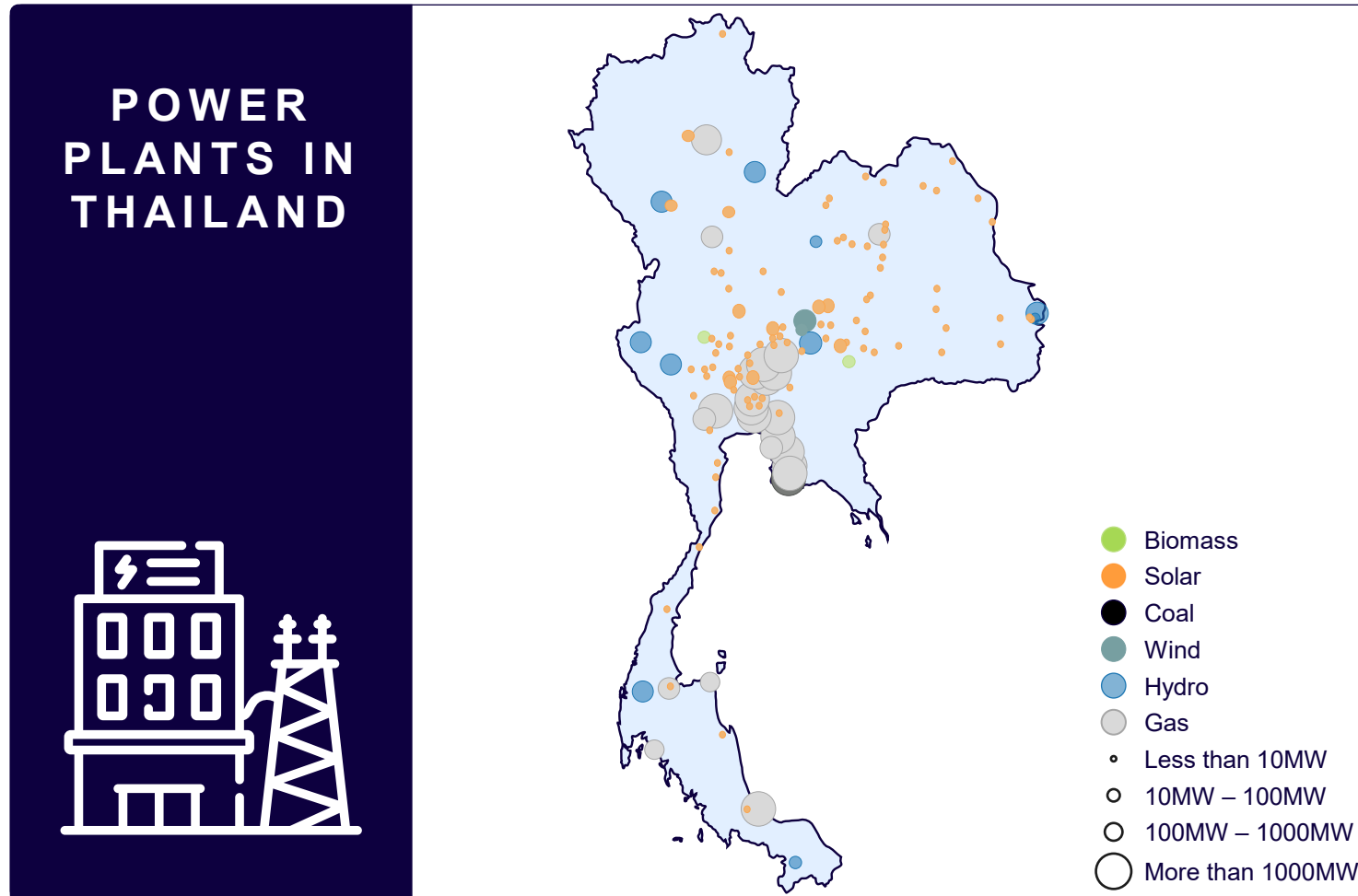
- **Update:** IPPs have surpassed state-owned EGAT in terms of generation capacity (39% vs. 31%)
- SPPs remain a smaller contributor at 18%
- Energy imports currently form the smallest proportion of installed generating capacity

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10. 電力需給状況

タイの石炭火力・ガス火力発電所は人口集中地帯や工業地帯に近い中部地域に多く立地している一方、太陽光発電所は全国に比較的分散して設置

NON-EXHAUSTIVE



COMMENTS



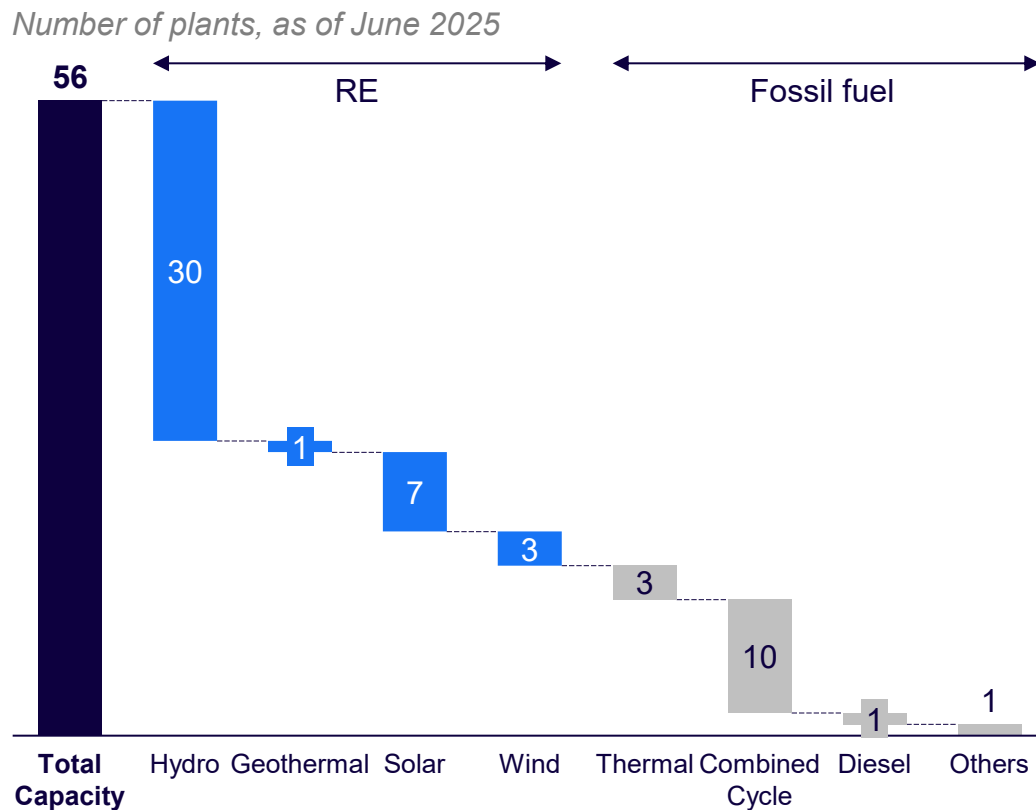
- Higher-capacity coal and natural gas power plants appear concentrated within **Central Thailand** – such as the Bangkok Metropolitan Area and Chonburi/Rayong Provinces
- This is likely due to the proximity to **dense population centers** and nearby industrial estates
- **Solar power plants** appear to be relatively more **dispersed** across Thailand, compared to other energy sources

Note: Map is illustrative and not drawn to scale

Source: Electricity Generating Authority of Thailand (EGAT), Greening the Grid 2018, World Resources Institute 2018, Arthur D. Little analysis

EGATはタイ国内で合計56の発電所を運営しており、そのうち14基が化石燃料に依存。設備容量の内訳はコンバインドサイクルが52%、火力23%、水力19%、その他が6%を占める

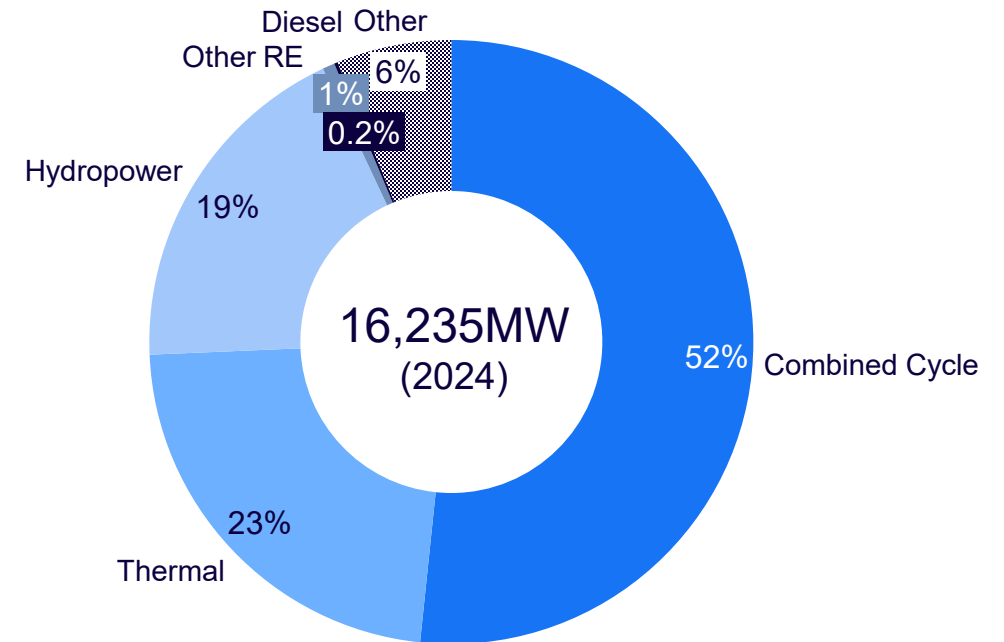
Breakdown of EGAT Power Plants



Installed Capacity in EGAT Power Plants

2024, MW

Installed capacity (2024), in MW



Note: (1) Other RE is inclusive of other renewable energy sources, such as solar, wind, geothermal, biomass, etc. (2) Combined cycle, thermal and diesel plants are assumed to be fully reliant on fossil fuels

Source: Electricity Generating Authority of Thailand (EGAT), Arthur D. Little Analysis

タイの独立発電事業者（IPP）の一覧（2024年6月現在）

NON-EXHAUSTIVE

#	Companies	Total Contracted Capacity, MW	Fuel Type
1	RATCH Group	3,481.0	Natural Gas
2	Gulf SRC	2,500.0	Natural Gas
3	Gulf PD	1,875.0	Natural Gas
4	Gulf JP NS	1,600.0	Natural Gas
5	Gulf JP NT	1,600.0	Natural Gas
6	Kaeng Khoi Power Generation	1,468.0	Natural Gas
7	Ratchaburi Power	1,400.0	Natural Gas
8	BLCP Power	1,346.5	Coal (Bituminous)
9	Electricity Generating (EGCO)	930.0	Natural Gas
10	Glow IPP	713.0	Natural Gas
11	Global Power Synergy (GPSC)	700.0	Natural Gas
12	HKP	700.0	Natural Gas
13	GHECO-One	660.0	Coal (Bituminous)
Total		18,973.5	Total

Major IPPs in Thailand rely on coal or natural gas fuel for power generation; **RATCH and Gulf** are the dominant players in the IPP sphere, collectively contributing ~58.2% of total contracted capacity

タイにおける小規模発電事業者（SPP）の一覧(1/5)

NON-EXHAUSTIVE

SPPs with Firm Power Purchase Agreements¹ – Cogeneration

#	Companies	Total Contracted Capacity, MW	Fuel Type
1	Amata B. Grimm Power (10 projects)	780.0	Natural Gas
2	Gulf JP (6 projects)	630.0	Natural Gas
3	Glow SPP (8 projects)	420.0	Natural Gas, Coal
4	Gulf TS (4 projects)	360.0	Natural Gas
5	B.Grimm Power (6 projects)	360.0	Natural Gas
6	Rojana Power (2 projects)	180.0	Natural Gas
8	Ratchaburi World Cogeneration (2 projects)	180.0	Natural Gas
9	SSUT (2 projects)	180.0	Natural Gas
10	TOP SPP (2 projects)	180.0	Natural Gas
11	IRPC Clean Power (2 projects)	180.0	Natural Gas

タイにおける小規模発電事業者（SPP）の一覧(2/5)

NON-EXHAUSTIVE

SPPs with Firm Power Purchase Agreements¹ – Renewables

#	Companies	Total Contracted Capacity, MW	Fuel Type
1	National Power Plants (3 projects)	116.0	Husk, Biomass
2	Mitrphol Bio-Power (6 projects)	113.8	Bagasse
3	Buayai Bio Power	25.0	Biomass
4	Uthong Green Power	24.0	Biomass
5	Khonburi Power Plant	22.0	Bagasse
6	Thip Pichit Hybrid Energy	21.0	Biomass
8	Gulf Yala Green	20.2	Para-Wood Residue
9	A.T. Bio Power	20.0	Husk
10	Khon Kaen Sugar Power Plant	20.0	Bagasse
11	Super Solar Energy	16.0	Solar

タイにおける小規模発電事業者（SPP）の一覧(3/5)

NON-EXHAUSTIVE

SPPs with Non-Firm Power Purchase Agreements¹ – Cogeneration

#	Companies	Total Contracted Capacity, MW	Fuel Type
1	Global Power Synergy (2 projects)	100.0	Natural Gas
2	DCAP	65.0	Natural Gas
3	PTT Global Chemical	60.0	Natural Gas
4	IRPC	45.0	Natural Gas

Note: 1) Non-firm PPAs have terms that do not exceed five years, during which the project operator would not be required to provide electricity in peak demand months to EGAT
 Source: Krungsri Research, Arthur D. Little Analysis

タイにおける小規模発電事業者（SPP）の一覧(4/5)

NON-EXHAUSTIVE

SPPs with Non-Firm Power Purchase Agreements¹ – Renewables (1/2)

#	Companies	Total Contracted Capacity, MW	Fuel Type
1	EA Solar (3 projects)	270.0	Solar
2	Natural Energy Development	55.0	Solar
3	SPP Six	41.0	Solar
4	Sermsang Palang Ngan	40.0	Solar
5	BCPG	30.0	Solar
6	EA Wind (3 projects)	126.0	Wind
8	First Korat Wind	90.0	Wind
9	K.R. Two	90.0	Wind
10	K.S.R. Three	90.0	Wind
11	Theparak Wind	90.0	Wind
12	Mitrphol Bio Power (4 projects)	82.0	Bagasse
13	Kaset Thai Bio Power	60.0	Bagasse
14	ES Power (2 projects)	40.0	Bagasse

Note: 1) Non-firm PPAs have terms that do not exceed five years, during which the project operator would not be required to provide electricity in peak demand months to EGAT
 Source: Krungsri Research, Arthur D. Little Analysis

タイにおける小規模発電事業者（SPP）の一覧(5/5)

NON-EXHAUSTIVE

SPPs with Non-Firm Power Purchase Agreements¹ – Renewables (2/2)

#	Companies	Total Contracted Capacity, MW	Fuel Type
15	Thai Ekaluck Power	38.0	Bagasse
16	Khon Kaen Sugar Power Plant	30.0	Bagasse
17	TPI Polene Power (3 projects)	163.0	Waste

タイにおける超小規模発電事業者（VSPP）の一覧(1/3)

NON-EXHAUSTIVE

Major VSPPs with Power Purchase Agreements

#	Companies	Total Contracted Capacity, MW	Fuel Type
1	Solar Power (34 projects)	231.7	Solar
2	Bangchak Solar Energy (12 projects)	119.1	Solar
3	Siam Solar Energy (10 projects)	91.3	Solar
4	17 Anyavee Holding (14 projects)	76.5	Solar
5	Rang Ngern Solution (11 projects)	74.1	Solar
6	Equator Solar (16 projects)	66.5	Solar
8	Power Technology International (10 projects)	59.5	Solar
9	B.Grimm Yanhee Solar Power (8 projects)	57.6	Solar
10	Solarco (6 projects)	57.6	Solar
11	Energy Serve (10 projects)	55.8	Solar
12	Bothaong Wind Farm	16.0	Wind
13	Theppana Wind Farm	7.5	Wind
14	Lam Takhong Wind	2.5	Wind

タイにおける超小規模発電事業者（VSPP）の一覧(2/3)

NON-EXHAUSTIVE

Major VSPPs with Power Purchase Agreements

#	Companies	Total Contracted Capacity, MW	Fuel Type
15	Advance Clean Power (4 projects)	39.6	Biomass
16	TPCH Power (3 projects)	26.1	Biomass
17	Oscar Save The World (2 projects)	19.8	Biomass
18	Advance Agro Power Plant (2 projects)	19.8	Biomass
19	Alliance Clean Power (2 projects)	19.8	Biomass
20	Siam Quality Energy (2 projects)	18.2	Biogas
21	S.P.O. Agro Industry (2 projects)	16.6	Biogas
22	Univanich Palm Oil (3 projects)	13.2	Biogas
23	General Starch (1 project)	9.4	Biogas
24	Sanguanwongse Energy (1 project)	8.6	Biogas
25	Alliance Clean Power (2 projects)	12.0	Waste
26	Super Earth Energy 6	9.9	Waste
27	Super Energy Group	9.9	Waste

タイにおけるガス火力発電所の一覧(1/5)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	Amata B.Grimm	732	B.Grimm
2	Amata B.Grimm Power (Rayong) 1	123.3	B.Grimm
3	Amata B.Grimm Power (Rayong) 2	124.4	B.Grimm
4	Amata B.Grimm Power (Rayong) 3	133	B.Grimm
5	Amata B.Grimm Power (Rayong) 4	133	B.Grimm
6	Amata B.Grimm Power (Rayong) 5	133	B.Grimm
7	B.Grimm BIP	230	B.Grimm
8	B.Grimm Power (Laem Chabang) 1 Limited	103	B.Grimm
9	B.Grimm Power (Laem Chabang) 2 Limited	56	B.Grimm
10	B.Grimm Power (WHA) 1 Limited (Bowin Clean Energy)	132	Bowin Clean Energy, Ltd., Hemaraj Energy, Ltd., B.Grimm Power
11	Bang Bo	350	Eastern Power and Electric Company
12	Bang Pakong Power Plant Unit 5	710	Electricity Generating Authority of Thailand (EGAT)
13	Bang Pakong Power Plant Units 1 & 2 Replacements	1408	Electricity Generating Authority of Thailand (EGAT)
14	Bang Pakong Power Plant Units 3 & 4	1780	Electricity Generating Authority of Thailand (EGAT)

タイにおけるガス火力発電所の一覧(2/5)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
15	Chana Block 1	710	Electricity Generating Authority of Thailand (EGAT)
16	Chana Block 2	766	Electricity Generating Authority of Thailand (EGAT)
17	CUP-1	226	GPSC (Global Power Synergy Corp)
18	CUP-2	113	GPSC (Global Power Synergy Corp)
19	EGCO Cogen	112	EGCO (Electricity Generating Public Company, Ltd.)
20	Glow Demin	124	Global Power Synergy Public Company
21	Glow Energy Phase 2 Power Plant	281	Global Power Synergy Public Company
22	Glow Energy Phase 5 Power Plant	412	Global Power Synergy Public Company
23	Glow IPP	713	Global Power Synergy Public Company, WHA
24	Glow SPP 11	272	Global Power Synergy Public Company
25	Gulf NLL Power Station Unit 1	123	J-POWER, Gulf Energy Development Public Co. Ltd., WHA
26	Gulf NLL Power Station Unit 2	127	Gulf Energy Development Public Co. Ltd., Mitsui & Co. Ltd.
27	Gulf Sriracha Power Plant (GSRC)	2650	Gulf Energy Development, Mitsui
28	Gulf Tasit 3 (GTS3)	129.9	Gulf Energy Development
29	Kaeng Khoi 2	1468	EGCO (Electricity Generating Public Company, Ltd.)

タイにおけるガス火力発電所の一覧(4/5)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
30	Khanom	748	EGCO (Electricity Generating Public Company, Ltd.)
31	Khanom 4	970	EGCO (Thailand), Mitsubishi Corp (Japan), TEPCO (Japan)
32	Lan Krabue	150	Electricity Generating Authority of Thailand (EGAT)
33	Nam Phong (Blocks 1-2)	710	Electricity Generating Authority of Thailand (EGAT)
34	Nong Khae	126	EGCO (Electricity Generating Public Company, Ltd.)
35	Nong Saeng	1,600	Gulf JP NS (owned by J-Power etc.)
36	North Bangkok Power Station Block 1	704	Electricity Generating Authority of Thailand (EGAT)
37	North Bangkok Power Station Block 2	848.3	Electricity Generating Authority of Thailand (EGAT)
38	Ratchaburi (RATCHGEN)	3,645	Ratchaburi Electric Generating Company
39	Ratchaburi Power (RPCL)	1,400	Ratchaburi Electric Generating Company
40	Rayong	1,232	EGCO (Electricity Generating Public Company, Ltd.)
41	Rojana Power Plant 1	1,600	J-Power
42	Saha Patana	122	Sahacogen Co Ltd
43	South Bangkok Power Station Unit 2	562	Electricity Generating Authority of Thailand (EGAT)
44	South Bangkok Power Station Unit 3	710	Electricity Generating Authority of Thailand (EGAT)

タイにおけるガス火力発電所の一覧(5/5)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
45	South Bangkok Power Station Unit 4	1,220	Electricity Generating Authority of Thailand (EGAT)
46	Sriracha	700	GPSC (Global Power Synergy Corp)
47	Tri Energy Power Plant	700	Ratchaburi Electric Generating Company
48	Utai	1,600	Gulf JP UT
49	Wang Noi Unit 3	686	Electricity Generating Authority of Thailand (EGAT)
50	Wang Noi Unit 4	750	Electricity Generating Authority of Thailand (EGAT)

タイにおける水力発電所の一覧(1/3)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	Ban Khun Klang Dam	0.2	Electricity Generating Authority of Thailand (EGAT)
2	Ban Santi	1.28	Electricity Generating Authority of Thailand (EGAT)
3	Ban Yang Dam	0.13	Electricity Generating Authority of Thailand (EGAT)
4	Bang Lang Dam	72	Electricity Generating Authority of Thailand (EGAT)
5	Bhumibol Dam	779	Electricity Generating Authority of Thailand (EGAT)
6	Chao Phraya Dam	12	Electricity Generating Authority of Thailand (EGAT)
7	Chulabhorn Dam	40	Electricity Generating Authority of Thailand (EGAT)
8	Chulabhorn Downstream Hydropower Project	1.25	Electricity Generating Authority of Thailand (EGAT)
9	Hua Na	<i>n/a</i>	Electricity Generating Authority of Thailand (EGAT)
10	Huai Kui Mang Dam	0.1	Electricity Generating Authority of Thailand (EGAT)
11	Huai Kum	1.06	Electricity Generating Authority of Thailand (EGAT)
12	Kaeng Krachan Dam	19	Electricity Generating Authority of Thailand (EGAT)
13	Khlong Chong Klam Dam	0.02	Electricity Generating Authority of Thailand (EGAT)
14	Khun Dan Prakarn Chon Dam	11	Electricity Generating Authority of Thailand (EGAT)
15	Kiew Kor Mah Hydropower Plant	5.5	Electricity Generating Authority of Thailand (EGAT)

タイにおける水力発電所の一覧(2/3)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
16	Klong Tron Hydropower Plant	2.5	Electricity Generating Authority of Thailand (EGAT)
17	Kwai Noi Bumrung Dan Dam	30	Electricity Generating Authority of Thailand (EGAT)
18	Lam Dom Yai	2	<i>n/a</i>
19	Lamtakong Jolabha Vadhana Power Plant Units 1-2	500	Electricity Generating Authority of Thailand (EGAT)
20	Lamtakong Jolabha Vadhana Power Plant Units 3-4	500	Electricity Generating Authority of Thailand (EGAT)
21	Mae Klong Dam	12	Electricity Generating Authority of Thailand (EGAT)
22	Mae Na	<i>n/a</i>	<i>n/a</i>
23	Mae Ngat Somboon Chon Dam	9	Electricity Generating Authority of Thailand (EGAT)
24	Nam Phung	<i>n/a</i>	Intracom
25	Naresuan Dam	8	Electricity Generating Authority of Thailand (EGAT)
26	Pak Mun Dam	136	Electricity Generating Authority of Thailand (EGAT)
27	Pasak Jolasid Dam	6.7	Electricity Generating Authority of Thailand (EGAT)
28	Rajjaprabha Dam	240	Electricity Generating Authority of Thailand (EGAT)
29	Sirikit Dam	500	Electricity Generating Authority of Thailand (EGAT)
30	Sirindhorn Dam	36	Electricity Generating Authority of Thailand (EGAT)

タイにおける水力発電所の一覧(3/3)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
31	Srinagarind Dam	720	Electricity Generating Authority of Thailand (EGAT)
32	Srinagarind Pumped Storage	360	Electricity Generating Authority of Thailand (EGAT)
33	Tha Thung Na Dam	39	Electricity Generating Authority of Thailand (EGAT)
34	Ubol Ratana Dam	25.2	Electricity Generating Authority of Thailand (EGAT)
35	Vajiralongkorn Dam	300	Electricity Generating Authority of Thailand (EGAT)

タイにおける石炭火力発電所の一覧

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	Ayuthaya Mill	36.0	Hiang Seng Fibre Container Co (Thailand)
2	Bangkok HSFC Plant 2R	36.0	Hiang Seng Fibre Container Co (Thailand)
3	Gheco One	660.0	Glow Energy, WHA
4	Glow Energy CFB 3 Plant	85.0	Global Power Synergy Public Company
5	Glow Unit 1	222.0	Global Power Synergy Public Company
6	Glow Unit 2	222.0	Global Power Synergy Public Company
8	Mae Moh 4-7 Replacement	655.0	Electricity Generating Authority of Thailand (EGAT)
9	Mae-Moh 8-13	1,800.0	Electricity Generating Authority of Thailand (EGAT)
10	Map Ta Phut BLCP	1,434.0	Banpu, EGCO
11	Tha Tum Power Station	328.0	National Power Supply PCL
12	TPI Cement Coal Plant	150.0	TPI Polene Power
13	Wang Sala Plant	34.0	Thai Kraft Paper Industry

タイにおける地熱発電所の一覧

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	Fang Geothermal Power Plant	0.3	Electricity Generating Authority of Thailand (EGAT)
2	Mae Chan	1.0	Electricity Generating Authority of Thailand (EGAT)
3	San Kamphaeng	1.0	Electricity Generating Authority of Thailand (EGAT)
4	Wang Chin	1.0	Electricity Generating Authority of Thailand (EGAT)
5	Wiang Pa Pao	1.0	Electricity Generating Authority of Thailand (EGAT)

タイにおける化石燃料混合発電所の一覧

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	Krabi Natural Gas/Diesel	315	Electricity Generating Authority of Thailand (EGAT)
2	Surat Thani	244	Electricity Generating Authority of Thailand (EGAT)

タイにおける石油火力発電所の一覧

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	Mae Hong Son	5.4	Electricity Generating Authority of Thailand (EGAT)

タイにおける太陽光発電所の一覧 (1/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	AJ Technology Company Limited (AJ)	3.7	AJ Technology Co. Ltd. (Solar Power Asset Co., Ltd., Dr. Art-ong Jumsai No Ayudhya, Mr. Krit Jumsai Na Adhya, Solar Power Co., Ltd.)
2	Akekamai-Ramintra Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
3	Ang Thong Solar Power Plant	1.2	Bangkok Solar Power Company, Ltd.
4	Auto Alliance Rooftop Solar	5	Auto Alliance
5	Baan-Kluai Phase 1 Gunkul Powergen Solar Power Plant	8.61	Gunkul Powergen Co. Ltd., Agrinergy Pte Ltd.
6	Bamnet Narong - BSE Solar Power Plant	16	Bangchak Solar Energy Company, Ltd.
7	Bamnet Narong - BSP Solar Power Plant	22.5	Siam Solar Generation Company Limited
8	Ban Kluai Solar Power Plant	7.4	Gunkul Chubu Powergen Company Limited (Thailand, Japan)
9	Bang Ban Solar Power Plant	7	Bangkok Solar Power Company, Ltd.
10	Bang Sai Solar Power Plant	1.7	Bangkok Solar Power Company, Ltd.
11	Bangchak Solar Power Plant	16	Bangchak Solar Energy Company, Ltd.
12	Bangchak Solar Power Project	44.5	Solarco Company Limited, Yanhee EGCO Holding

タイにおける太陽光発電所の一覧 (2/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
13	BCPG Solar Government Project-Phra Phutthabat	5	Bangchak Corporation Public Company Ltd. (BCPG), War Veterans Organization of Thailand
14	BCPG Solar Government Project-Tha Muang	4	Bangchak Corporation Public Company Ltd. (BCPG), War Veterans Organization of Thailand
15	Buri Ram 1 Solar Power Plant	7.4	Solar Power (Bureerum 1) Company Limited (Solar Power Co. Ltd)
16	Buri Ram 2 Solar Power Plant	7.4	Solar Power (Bureerum 2) Company Limited (Solar Power Co. Ltd)
17	Buri Ram 3 Solar Power Plant	7.4	Solar Power (Bureerum 3) Company Limited (Solar Power Co. Ltd)
18	C on Top PV Solar Farm Project	12	C on Top Co., Ltd.
19	Chachoengsao Solar Power Plant	1.3	Bangkok Solar Power Company, Ltd.
20	Chiang Mai University Rooftop Solar	12	Bangchak Corporation Public Company Ltd. (BCPG)
21	Chiang Rai Solar Park	9	Chiang Rai Solar Co., Ltd.
22	Chongdan Solar Power Plant	8	SSE-PV1 Project (Thailand)
23	Chumphon Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
24	Conergy Suphanburi Solar Plant	11	Conergy Group (Germany)
25	Dong Khon Solar Power Plant	7.6	G-Power Source Co Ltd (Thailand)

タイにおける太陽光発電所の一覧 (3/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
26	EA Solar Farms	9.33	EA Solar Co. Ltd.
27	EGCO SPP5 Solar Plant	8	ECGO (Thailand)
28	EGCO SunWat 1 Solar Plant	14	ECGO (Thailand), Sunedison Thailand Holdco (Thailand)
29	EGCO SunWat 2 Solar Plants	8	<i>n/a</i>
30	EGCO SunWat 3 Solar Plant	8	<i>n/a</i>
31	EGCO SunWat 4 Solar Plants	6	
32	GPS Nakhon Sawan & Chai Nat Solar Plants	20	ECGO and Gunkul Engineering (Thailand)
33	Hat Yai Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
34	Huay Kachao Solar Power Plant	5	Thai Solar Energy 1 (TSE1) (Thailand)
35	Khan Rai - BSP Solar Power Plant	4.5	Bangkok Solar Power Company, Ltd.
36	Khao Yai Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
37	Khao Yao Solar Power Plant	10	Bangkok Solar Power Company, Ltd.
38	Khlong Chong Klum Solar Power Plant	20	Electricity Generating Authority of Thailand (EGAT)
39	Khok Kham Project	5	Enmax Holding (Thailand) Co Ltd./GCL-SI
40	Khok Thai Solar Power Plant	12.7	Ch. Karnchang Public Company, Limited

タイにおける太陽光発電所の一覧 (4/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
41	Khon Kaen 1 Solar Power Plant	6.1	Solar Power (Khon Kaen 1) Company Limited (Solar Power Co. Ltd.; Thai Fa Power Co. Ltd.)
42	Khon Kaen 10 Solar Power Plant	7.4	Solar Power (Khon Kaen 10) Company Limited (Solar Power Co. Ltd; PEAC ENCOM International Co. Ltd)
43	Khon Kaen 2 Solar Power Plant	7.4	Solar Power (Khon Kaen 2) Company Limited (Solar Power Co. Ltd)
44	Khon Kaen 3 Solar Power Plant	7.4	Solar Power (Khon Kaen 3) Company Limited (Solar Power Co. Ltd)
45	Khon Kaen 4 Solar Power Plant	7.4	Solar Power (Khon Kaen 4) Company Limited (Solar Power Co. Ltd)
46	Khon Kaen 5 Solar Power Plant	7.4	Solar Power (Khon Kaen 5) Company Limited (Solar Power Co. Ltd)
47	Khon Kaen 6 Solar Power Plant	7.4	Solar Power (Khon Kaen 6) Company Limited (Solar Power Co. Ltd)
48	Khon Kaen 7 Solar Power Plant	7.4	Solar Power (Khon Kaen 7) Company Limited (Solar Power Co. Ltd)
49	Khon Kaen 8 Solar Power Plant	7.4	Solar Power (Khon Kaen 8) Company Limited (Solar Power Co. Ltd)
50	Khon Kaen 9 Solar Power Plant	7.4	Solar Power (Khon Kaen 9) Company Limited (Solar Power Co. Ltd.)

タイにおける太陽光発電所の一覧 (5/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
51	Korat 1 Solar Power Plant	6.1	Solar Power (Korat 1) Company Limited (Solar Power Co. Ltd; International Finance Corporation; Thai Fa Power Co. Ltd)
52	Korat 2 Solar Power Plant	6.1	Solar Power (Korat 2) Company Limited (Solar Power Co. Ltd; Thai Fa Power Co. Ltd_
53	Korat 3 Solar Power Plant	6.1	Solar Power (Korat 3) Company Limited (Solar Power Co. Ltd.; Ratchaburi Electricity Generating Holding Public Co. Ltd.)
54	Korat 4 Solar Power Plant	6.1	Solar Power (Korat 4) Company Limited (Solar Power Co. Ltd.; Ratchaburi Electricity Generating Holding Public Co. Ltd.)
55	Korat 5 Solar Power Plant	7.4	Solar Power (Korat 5) Company Limited (Solar Power Co. Ltd.)
56	Korat 6 Solar Power Plant	7.4	Solar Power (Korat 6) Company Limited (Solar Power Co. Ltd.)
57	Korat 7 Solar Power Plant	6.1	Solar Power (Korat 7) Company Limited (Solar Power Co. Ltd.; Ratchaburi Electricity Generating Holding Public Co. Ltd.)
58	Korat 8 Solar Power Plant	7.4	Solar Power (Korat 8) Company Limited (Solar Power Co. Ltd.)

タイにおける太陽光発電所の一覧 (6/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
59	Korat 9 Solar Power Plant	7.4	Solar Power (Korat 9) Company Limited (Solar Power Co. Ltd.)
60	Kui Buri Solar Power Plant	10	Bangkok Solar Power Company, Ltd.
61	Lampang Solar Farm	101.25	EA Solar Lampang Co., Ltd.
62	Loei 1 Solar Power Plant	6.1	Solar Power (Loei 1) Company Limited (Solar Power Co. Ltd; Thai Fa Power Co. Ltd.)
63	Loei 2 Solar Power Plant	7.4	Solar Power (Loei 2) Company Limited (Solar Power Co. Ltd; PEA ENCOM International Co. Ltd)
64	Lopburi - Absolute Energy Solar Power Plant	8	EA Solar Lopburi Company Limited (Thailand)
65	Lopburi - BSP 1 Solar Power Plant	2	Bangkok Solar Power Company, Ltd.
66	Lopburi - BSP 4 Solar Power Plant	2	Bangkok Solar Power Company, Ltd.
67	Lopburi - BSP 5 Solar Power Plant	2	Bangkok Solar Power Company, Ltd.
68	Lopburi - BSP 6 Solar Power Plant	4	Bangkok Solar Power Company, Ltd.
69	Lopburi - SAAM 1 Solar Power Plant	2	SAAM Solar Power One Company Limited (Thailand)
70	Lopburi Solar Farm	84	Natural Energy Development Co (JV of China Light and Power's CLP Thailand), Mitsubishi Corporation's Diamond Generating Asia, and Thailand's Electricity Generating Public Company

タイにおける太陽光発電所の一覧 (7/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
71	Lopburi Solar Rooftop Plant (TSER-RT01)	1	Thai Solar Energy Public Company Limited (TSE)
72	Nakhon Phanom 1 Solar Power Plant	6.1	Solar Power (Nakhon Phanom 1) Company Limited (Solar Power Co. Ltd; International Finance Corporation; Energy for Environment Foundation Thai Fa Power Company Ltd.)
73	Nakhon Phanom 2 Solar Power Plant	7.4	Solar Power (Nakhon Phanom 2) Company Limited (Solar Power Co. Ltd)
74	Nakhon Phanom 3 Solar Power Plant	7.4	Solar Power (Nakhon Phanom 3) Company Limited (Solar Power Co. Ltd)
75	Nakhon Phanom Solar Farm	18	SPP Five Co Ltd (Thailand), EGCO Group (Thailand)
76	Nakhon Ratchasima - BSP Solar Power Plant	1	Bangkok Solar Power Company, Ltd.
77	Nakhon Ratchasima Solar PV Project	7.5	Nakhon Ratchasima Solar Co. Ltd.
78	Nakhon Sawan Rooftop Solar Power Plant (TSER-RT03)	1	Thai Solar Energy Public Company Limited (TSE)
79	Nakhon Sawan Solar Power Plant	90	EA Solar Nakornsawan Company Limited (Thailand)
80	Nakhon Si Thammarat Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)

タイにおける太陽光発電所の一覧 (8/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
81	Noen Po Solar Power Plant	5.6	Gunkul Chubu Powergen Company Limited (Thailand)
82	Nong Khai 1 Solar Power Plant	7.4	Solar Power (Nong Khai 1) Company Limited (Thailand)
83	Nong Khai Solar Farm	6	SPCG Public Company Limited (Thailand)
84	Nong On Solar Power Plant	8	SSE-PV9 Project (Thailand)
85	Nongkrathum 4 Solar Power Plant	8	SSE-PV4 Project (Thailand)
86	Nongkrathum 5 Solar Power Plant	8	SSE-PV5 Project (Thailand)
87	Nongyasai Solar Power Plant	8	SSE-PV3 Project (Thailand)
88	Pantai	5	Enmax Holding (Thailand) Co Ltd., GCL-SI ((Thailand))
89	Pha Bong Solar Power Plant	0.5	Electricity Generating Authority of Thailand (EGAT)
90	Phanom Thuan Solar Power Plant	8	SSE-PV8 Project (Thailand)
91	Phetchaburi Solar Power Plant	2.1	Bangkok Solar Power Company, Ltd.
92	Phitsanulok Solar Farm	90	Energy Absolute (Thailand)
93	Phrae Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
94	Phromthep Cape Renewable Energy Power Plant	8	Electricity Generating Authority of Thailand (EGAT)
95	Prachin Buri	8.7	Loxely (Thailand)

タイにおける太陽光発電所の一覧 (9/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
96	Prachinburi Solar Park	19	Conergy, Symbior Solar
97	Provincial Solar Power Project	50	
98	Ratchaphruek Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
99	Roi Et - SPP5 Solar Power Plant	8	SPP Five Co Ltd (SPP 5)
100	Roi Et Solar Farm	12	SPCG Public Company Limited Thailand), EGCO Group (Thailand)
101	Sai Khew power plant	9.5	Electricity Generating Company (EGCO), Yanhee Group (Thailand)
102	Sai Kyo	9.5	Solarco Company Limited
103	Sai Kyo Solar Power Plant	11.9	Solarco Company Limited
104	Sai Phet 1-3	35.9	Solarco Company Limited
105	Sai Prapa Solar Power Plant	7.2	Solarta Co Ltd (Spain)
106	Sai Saphan Solar Power Plant	7	Solarta Co Ltd (Spain)
107	Sai Sena - Solarta Solar Power Plant	3	Solarta Co Ltd (Spain)
108	Sai Tatong Solar Power Plant	1	Solarta Co Ltd (Spain)
109	Sai Thong Solar Power Plant	6.1	Solarta Co Ltd (Spain)
110	Sai Yai - Solarco Solar Power Plant	23.8	Solarco Company Limited

タイにおける太陽光発電所の一覧 (10/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
111	Sai Yai - Solarta Solar Power Plant	9.7	Solarta Co Ltd (Spain)
112	Sai Yai 1 and 2	15	Solarco Company Limited
113	Sai Yai 1,2 and Sai Phet 1, 2, 3 power plants	47.5	Electricity Generating Company (EGCO) (Thailand), Yanhee Group (Thailand)
114	Sai Yoi Solar Power Plant	3	Solarta Co Ltd (Spain)
115	SAIC MOTOR-CP Solar Carpark	4.88	WHAUP
116	Sakon Nakhon 1 Solar Power Plant	6.1	Solar Power (Sakon Nakhon 1) Company Limited (Solar Power Co. Ltd; International Finance Corporation; Energy for Environment Foundation; Thai Fa Power Co. Ltd)
117	Sakon Nakhon 2 Solar Power Plant	7.6	Solar Power (Sakon Nakhon 2) Company Limited (Solar Power Co. Ltd)
118	Sakrajom Solar Power Plant	8	SSE-PV2 Project (Thailand)
119	San Kamphaeng Solar Power Plant	0.014	Electricity Generating Authority of Thailand (EGAT)
120	Saraburi - SPP2 Solar Power Plant	8	SPP Two Co Ltd (SPP 2) (Thailand)
121	Saraburi Solar Farm	22.5	Sena Solar Energy (Thailand)
122	Sirindhorn Floating Solar	45	Electricity Generating Authority of Thailand (EGAT)
123	Sisaket - SPP3 Solar Power Plant	8	SPP Three Co Ltd (SPP 3) (Thailand)
124	Solar Power (Khon Kaen 1) Co., Ltd.	6.1	Solar Power Company Limited, Thai Fa Power Company Limited (Thailand)

タイにおける太陽光発電所の一覧 (11/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
125	Solar Power (Korat 1) Company Limited (KR1)	6.1	Solar Power Company Limited, International Finance Corporation, Thai Fah Power Company Limited (Thailand)
126	Solar Power (Korat 2) Co., Ltd.	6.1	Solar Power Company Limited, Thai Fa Power Company Limited (Thailand)
127	Solar Power (Korat 3) Co., Ltd.	6.1	Solar Power Company Limited, Ratchaburi Electricity Generating Holding Public Company Limited (Thailand)
128	Solar Power (Korat 4) Co., Ltd.	6.1	Solar Power Company Limited, Ratchaburi Electricity Generating Holding Public Company Limited (Thailand)
129	Solar Power (Korat 5) Co., Ltd.	6.1	Solar Power Company Limited
130	Solar Power (Korat 7) Co., Ltd.	6.1	Solar Power Company Limited, Ratchaburi Electricity Generating Holding Public Company Limited (Thailand)
131	Solar Power (Korat 8) Co., Ltd.	6.1	<i>n/a</i>
132	Solar Power (Nakorn Phanom 1) Company Limited (NP1)	6.1	Solar Power Company Limited, International Finance Corporation, Energy for Environment Foundation, Thai Fa Power Company Limited (Thailand)
133	Solar Power (Sakon Nakorn 1) Company Limited (SN1)	6.1	Solar Power Company Limited, International Finance Corporation, Energy for Environment Foundation, Thai Fa Power Company Limited (Thailand)
134	Solarta Nakhon Pathom Solar Plant	12	Ratchaburi Electricity Generating Holding Plc, Yanhee Group
135	Solarta Nakhon Pathom Solar Plant	12	Ratchaburi Electricity Generating Holding Plc, Yanhee Group

タイにおける太陽光発電所の一覧 (12/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
136	Solarta Nakhon Pathom Solar Plant	12	Ratchaburi Electricity Generating Holding Plc, Yanhee Group
137	Solarta Nakhon Pathom Solar Plant	12	Ratchaburi Electricity Generating Holding Plc, Yanhee Group
138	SPCG Nakthon Ratchasima & Loei Solar Plants	18	Steel Intertech Public Company Limited, Thai Fa Power Company
139	SPM Group Floating Solar	2	Greenyellow
140	Sri Chula Solar Power Plant	8	Gunkul Chubu Powergen Company Limited
141	Surat Thani Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
142	Surin 1 Solar Power Plant	7.4	Solar Power (Surin 1) Company Limited (Solar Power Co. Ltd; PEA ENCOM Co. Ltd)
143	Surin 2 Solar Power Plant	7.4	Solar Power (Surin 2) Company Limited (Solar Power Co. Ltd; PEA ENCOM Co. Ltd)
144	Surin 3 Solar Power Plant	7.4	Solar Power (Surin 3) Company Limited (Solar Power Co.Ltd)
145	Suvarnabhumi Airport Solar Rooftop	4.4	Airport of Thailand, District Cooling System and Power Plant Company, EGAT, PTT Plc, Metropolitan Electricity Authority
146	Ta Khit Solar Power Plant	7.6	G-Power Source Co Ltd
147	Ta Sang	7.6	G-Power Source Co., Ltd (Gunkul Engineering Plc.)
148	Takhian - Sonnedix Solar Power Plant	7.5	Chiang Rai Solar Co., Ltd.

タイにおける太陽光発電所の一覧 (13/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
149	Tha Muang Solar Power Plant	8	SSE-PV7 Project
150	Thai Solar Power 1	5	Thai Solar Energy Co. Ltd.
151	Thap Sakae Solar Power Plant	5	Electricity Generating Authority of Thailand (EGAT)
152	Thap Tai Solar Power Plant	1.7	Bangkok Solar Power Company, Ltd.
153	The Mall - Bangkapi Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
154	The Mall - Ngamwongwan Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
155	The Mall - Tha Phra Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
156	Tipayanarai Company Limited (TP)	3.7	Tipayanarai Co. Ltd. (Solar Power Asset Co. Ltd.; Solar Power Company Limited)
157	Ubon Bio Ethanol Floating Photovoltaic	2.83	Ubon Bio Ethanol PCL, BayWa r.e. AG
158	Ubon Ratchathani - SPP4 Solar Power Plant	6	SPP Four Co Ltd (SPP 4)
159	Ubon Ratchathani Solar Power Plant	1	Thai Solar Energy Public Company Limited (TSE)
160	Udon Thani - BSP 2 Solar Power Plant	2	Bangkok Solar Power Company, Ltd.

タイにおける太陽光発電所の一覧 (14/14)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
161	Udon Thani - SPCG Solar Power Plant	7.4	Solar Power (Udon Thani 1) Company Limited
162	V.O. Net Biodiesel Asia	1.2	V.O. Net Biodiesel Asia
163	Wang Luek Solar Power Plant	8	SSE-PV10 Project
164	Wang Man 1 Solar Power Plant	10.2	Soleq Private Limited
165	Wang Man 2 Solar Power Plant	10.2	Soleq Private Limited
166	Wang Phloeng Solar Power Plant	8	Natural Energy Development Co Ltd (NED)
167	WHA Mega Logistics Center Rooftop	0.895	WHAUP
168	WHA Mega Logistics Center Solar Rooftop	2.3	WHAUP
169	Wichian Buri Solar Power Plant	8	Gunkul Chubu Powergen Company Limited

タイにおける風力発電所の一覧(1/2)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	Chaiyaphum Wind Farm	80.0	Electricity Generating Authority of Thailand (EGAT)
2	Huay Bong Wind Farm	207.0	Wind Energy Holding Co.
3	Khao Kor Wind Farm Project	59.8	Khao Kor Wind Power Co. Ltd. (Thailand); EDF Trading Ltd. (France)
4	Laem Chabang Wind Farm	200.0	Electricity Generating Authority of Thailand (EGAT)
5	Lamtakong Wind Turbines Phase 1	2.5	Electricity Generating Authority of Thailand (EGAT)
6	Lamtakong Wind Turbines Phase 2	24.0	Electricity Generating Authority of Thailand (EGAT)
7	Lom Ligor Project	10.0	Bangchak Corporation Public Company Ltd. (BCPG)
8	Mittraphap Wind Farm	50.0	Korat Wind Energy Company
9	Nakhon Si Thammarat Wind Farm	20.0	Electricity Generating Authority of Thailand (EGAT)
10	Pak Phanang	10.0	BCPG PLC
11	Phetchabun Wind Farm	60	Electricity Generating Authority of Thailand (EGAT)
12	Phrom Thep Cape	20	Electricity Generating Authority of Thailand (EGAT)
13	Phromthep Cape Renewable Energy Power Plant	0.15	Electricity Generating Authority of Thailand (EGAT)
14	Ratchaburi Khao Kho Wind Farm	60	Ratchaburi Electricity Generating Holding Plc, Wind Energy Holding (WEH) (Thailand)

タイにおける風力発電所の一覧(2/2)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
14	Ratchaburi Khao Kho Wind Farm	60	Ratchaburi Electricity Generating Holding Plc, Wind Energy Holding (WEH) (Thailand)
15	Sarahlom Wind Farm	67.5	Greenovation Power Ltd., subsidiary of Gunkul Engineering Plc (Thailand)
16	Subplu Wind Farm 1 + 2	10	Wind Energy Development Co.
17	Subyai Wind Power Project	90	Chaiyaphum Wind Farm Company Limited, Electricity Generating Authority of Thailand (EGAT)
18	Theparak T1 Wind Farm	90	Wind Energy Holding
19	Theparak T2 Wind Farm	90	Wind Energy Holding
20	Theparak T3 Wind Farm	90	Wind Energy Holding
21	Theparak T4 Wind Farm	90	Wind Energy Holding
22	Theppana Wind Power Project	7.5	THEPPANA WIND FARM COMPANY
23	Wayu Wind Farm	50	Wind Energy Development Co., Ltd
24	West Huaybong 2 (Korat Wind Farm)	103.5	K.R. Two Co., Wind Energy Holding Co., Ratchaburi Electricity Generating Holding Public Co., Chubu Electric Power Korat BV
25	West Huaybong 3 (Korat Wind Farm)	103.5	First Korat Wind Co., Wind Energy Holding Co., Ratchaburi Electricity Generating Holding Public Co., Chubu Electric Power Korat BV

タイにおける廃棄物発電所の一覧(1/2)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	Bangkok Kamphaeng Saen East	8	Bangkok Greenpower Co., Ltd.
2	Bangkok Kamphaeng Saen West	8	Progress Energy Co. Ltd
3	Bangna Starch Wastewater Treatment	2.85	P & Papop Renewable Co. Ltd.
4	Chao Khun Agro Biogas Energy Project	<i>n/a</i>	Thai Biogas Energy Co. Ltd.
5	Jiratpattana Biogas Energy Project	2	Thai Biogas Energy Co. Ltd.
6	Kitroongruang Biogas Energy Project	1.451	Thai Biogas Energy Co. Ltd.
7	Thachana Palm Oil Co. Wastewater Treatment Project	2	Thachana Palm Oil Co. Ltd.
8	Thachang Bio Power Company	9.9	Thachang Green Energy
9	Thailand TPI PP 60MW Refuse Incineration and 30MW Cement Kiln Waste Heat Recovery Power Plant Project EPC	90	Electricity Generating Authority of Thailand (EGAT)
10	UB Tapioca Starch Wastewater Treatment Project	1.904	Ubon Biogas Co. Ltd.

タイにおける廃棄物発電所の一覧(2/2)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
11	Univanich Siam Biogas to Energy Project	0.952	Univanich Oalm Oil Public Co. Ltd.
12	Univanich TOPI Biogas Project	2.856	Univanich Palm Oil Public Co. Ltd.

タイにおけるバイオマス発電所の一覧(1/4)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
1	A.T. Biopower Rice Husk Power Project	22.5	A.T. Biopower
2	Ajinomoto Waste Water Treatment and Biogas Utilization Project	4	Ajinomoto Co., Ltd.
3	APK Green Energy	9	<i>n/a</i>
4	Baanrai Biomass Power Plant	9.9	Thai Roong Ruang Sugar Group
5	Ban Beung Power Plant	9.9	Advance Clean Power Co., Ltd.
6	Bo Phloi Power Plant	9.9	Advance Clean Power Co., Ltd.
7	Buasomma I Biomass Power Plant	9.9	Buasomma Electricity Generating Co., Ltd., Quality Carbon Assets AG
8	Buasomma II Biomass Power Plant	9.9	Buasomma Electricity Generating Co., Ltd., Quality Carbon Assets AG
9	Buriram Biomass Power Plant	9.9	Buriram Sugar Public Co., Ltd.
10	Buriram Cogeneration Plant	9.9	Buriram Sugar Public Co., Ltd.
11	Buriram Power Plus Company	9.9	Buriram Power Plus Co., Ltd.
12	Buriram Sugar Factory	18.5	Buriram Sugar Public Co., Ltd.
13	Chang Raek Biomass Power Plant	9.5	TPC Power Holding PLC, EnBW Kraftwerke AG
14	Chok Chai Power Station	9.9	Advance Agro Power Plant Co., Ltd.

タイにおけるバイオマス発電所の一覧(2/4)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
15	Chokhchai Green Power Project	36	CCGP Chokchai Greenpower, DP Cleantech
16	Clover Phitsanulok	4.9	Clean Energy Community Co. Ltd. (SBANG Sustainable Energy Ltd.)
17	Clover Power Plant	9.4	Clover Power Co. Ltd. (SBANG Sustainable Energy Ltd.)
18	Decha Bio Green Co. Ltd	7.5	Decha Bio Green Co, Ltd.; EDF Trading Ltd. (EDFT)
19	Erawan Power Company Ltd.	16	Erawan Power Company Ltd. (TOA Group Holding Company Ltd.,)
20	Grid-Connected Biomass Power Plant	60	Kaset Thai Bio Power Co., Ltd.
21	Gulf Chana Green Biomass Power Plant	25	Gulf Chana Green Co. Ltd. (Gulf Energy Development)
22	Gussing Biomass Plant	1	Gussing Renewable Energy Thailand; Siam Cement Group
23	Jakkakhuei Power Plant	5	Hoang Anh Gia Lai Mitlao Sugar Factory (Vietnam)
24	Kaona Power Supply (KPS)	9.9	<i>n/a</i>
25	Khon Kaen Sugar Power Plant Co. Ltd.	40	Khon Kaen Sugar Industry Public Company Limited
26	Khon Kaen Sugar Power Plant Co. Ltd.	65	Khon Kaen Sugar Industry Public Company Limited

タイにおけるバイオマス発電所の一覧(3/4)

NON-EXHAUSTIVE

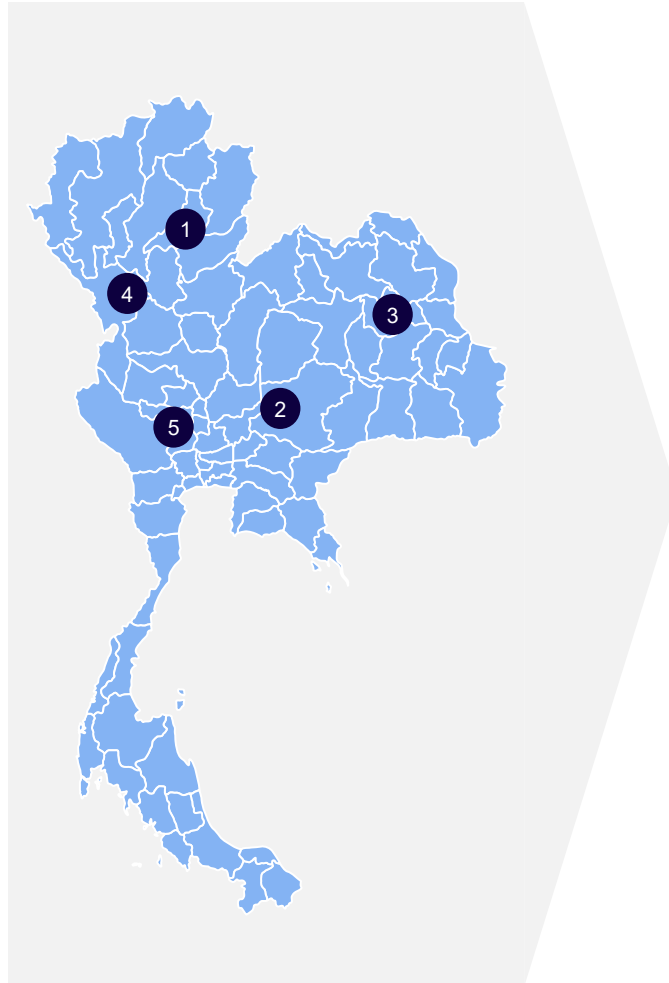
#	Project	Total Contracted Capacity, MW	Developer
26	Khon Kaen Sugar Power Plant Co. Ltd.	65	Khon Kaen Sugar Industry Public Company Limited
27	Khonburi Sugar Public Company Limited	22	Khonburi Sugar Public Company Limited
28	Mae Krating Biomass Power Plant	10	Mae Krating Power Co. Ltd acquired by Sakol Energy PLC
29	Mitr Phol Bio-Power (Dan Chang) Co. Ltd.	27	Dan Chang Bio-Energy Co. Ltd (subsidiary of Mitr Phol Sugar Corporation); Trading Emissions PLC
30	Mungcharoen Rice Husk Power Station	9.9	Mungcharoen Green Power Co (Thailand)
31	Nam Phong Power Station	9.9	<i>n/a</i>
32	Natural Electricity (NEPS)	6.5	<i>n/a</i>
33	Natural Palm Group (NEC)	9.4	<i>n/a</i>
34	Phon Thong power station	9.9	Advance Clean Power Co., Ltd.
35	Prasat (Ta Ni) Power Plant	9.9	Advance Agro Power Plant Co., Ltd.
36	Roi-Et Green Power	9.95	Roi-Et Green Co. Ltd (Thailand); Meidensha Co., Ltd; Sumitomo Corp (Japan)
37	Saraff Energies Co., Ltd	9.5	Saraff Energies Co. Ltd (Thailand); South Pole Carbon Asset Management Ltd
38	Si Chiang Mai Power Plant	9.9	Alliance Clean Power Co., Ltd.

タイにおけるバイオマス発電所の一覧(4/4)

NON-EXHAUSTIVE

#	Project	Total Contracted Capacity, MW	Developer
39	Sirindhorn Power Plant	9.9	Alliance Clean Power Co., Ltd.
40	Songkhla Biomass Company Limited Power Plant	9.9	Ratchaburi Electric Generating Company, Precise Power Producer
41	Sricharoen Power Plant (SPP)	9.5	<i>n/a</i>
42	Sub Anan	9.5	Sub Anan Biomass
43	Surat Thani Biomass Power Generation	9.95	Surat Thani Green Energy Co
44	Thoen Power Plant	9.9	Advance Bio Asia Co., Ltd.
45	Trang power stations	7.5	OTACO Co., Ltd.
46	TRC Clean Energy	9.9	TRC Clean Energy Co., Ltd.
47	Univanich Lamthap Biomass Project	1.2	Univanich Palm Oil Public Co. Ltd
48	Univanich Lamthap POME Biogas Project	0.952	Univanich Palm Oil Public Co. Ltd; Carbon Bridge Pte Ltd
49	Yala Biomass Power Plant	20	Guld Yala Green Co., Ltd, J-POWER

開発中の発電所プロジェクト – 内閣承認済み

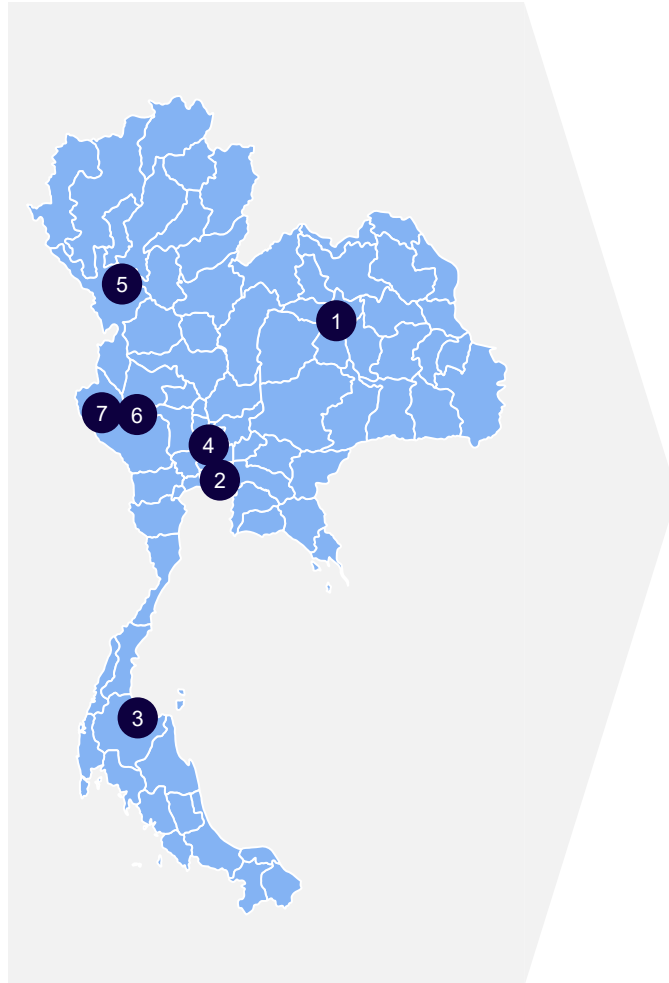


#	Name	Capacity (MW)	Primary Fuel	Owner	SCOD
1	Mae Moh Power Plant Replacement Project Units 8-9	600.0	Lignite	EGAT	2026
2	Lamtakong Dam Hydropower Plant, Nakhon Ratchasima	1.5	Hydropower	EGAT	2025
3	Lam Pao Dam Hydropower Plant, Kalasin	2.5	Hydropower	EGAT	2025
4	Huay Mae Tho Dam Hydropower Plant, Tak	1.25	Hydropower	EGAT	2026
5	Krasiew Dam Hydropower Plant, Suphan Buri	1.5	Hydropower	EGAT	2026

Note: Map is illustrative and not drawn to scale

Source: Electricity Generating Authority of Thailand (EGAT), Arthur D. Little analysis

開発中の発電所プロジェクト – 閣議承認待ち

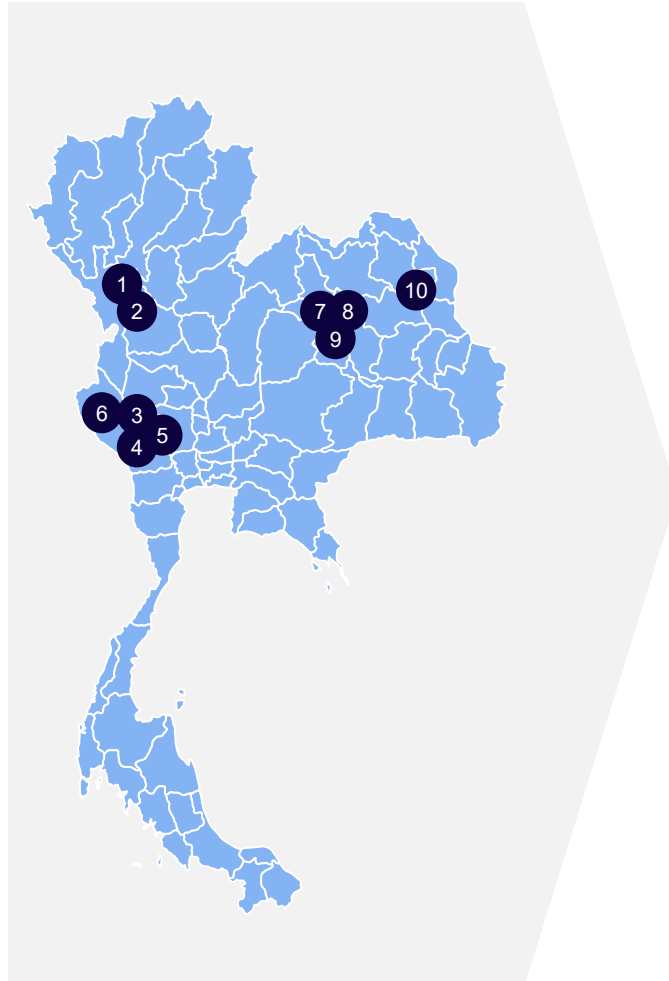


#	Name	Capacity (MW)	Primary Fuel	Owner	SCOD
1	Nam Phong Combined Cycle Power Plant, Block 3	650.0	Natural Gas	EGAT	2025
2	South Bangkok Combined Cycle Power Plant Project, Blocks 5-7	700.0 (Block 5) 1,400.0 (Block 6 – 7)	Natural Gas	EGAT	2026 2027
3	Phunphin Combined Cycle Power Plant Project, Blocks 1-2	700.0 (Block 1) 700.0 (Block 2)	Natural Gas	EGAT	2027 2029
4	North Bangkok Combined Cycle Power Plant Project, Block 3	700.0	Natural Gas	EGAT	2028
5	Bhumibol Dam Floating Solar Project 1	158.0	Floating Solar	EGAT	2026
6	Srinagarind Dam Floating Solar Project 1	140.0	Floating Solar	EGAT	2026
7	Vajiralongkorn Dam Floating Solar Project 1	50.0	Floating Solar	EGAT	2027

Note: Map is illustrative and not drawn to scale

Source: Electricity Generating Authority of Thailand (EGAT), Arthur D. Little analysis

開発中の注目の発電所プロジェクト – EGAT取締役会の承認待ち (1/2)

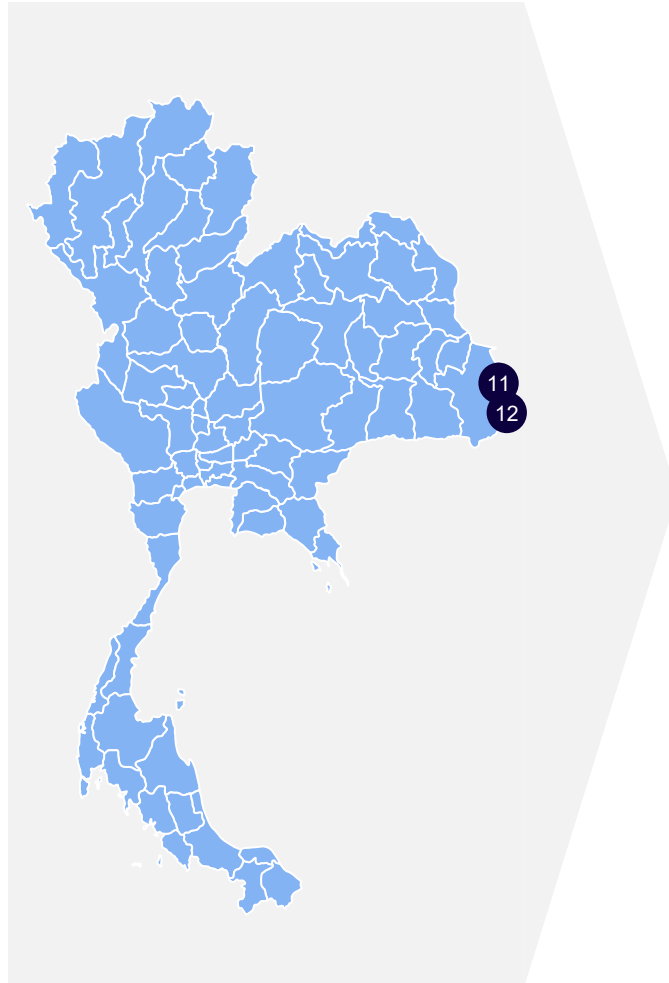


#	Name	Capacity (MW)	Primary Fuel	Owner
1	Bhumibol Dam Floating Solar Project 2	300.0	Floating Solar	EGAT
2	Bhumibol Dam Floating Solar Project 3	320.0	Floating Solar	EGAT
3	Srinagarind Dam Floating Solar Project 2	50.0	Floating Solar	EGAT
4	Srinagarind Dam Floating Solar Project 3	280.0	Floating Solar	EGAT
5	Srinagarind Dam Floating Solar Project 4	300.0	Floating Solar	EGAT
6	Vajiralongkorn Dam Floating Solar Project 2	40.0	Floating Solar	EGAT
7	Ubol Ratana Dam Floating Solar Project 2	60.0	Floating Solar	EGAT
8	Ubol Ratana Dam Floating Solar Project 3	200.0	Floating Solar	EGAT
9	Ubol Ratana Dam Floating Solar Project 4	280.0	Floating Solar	EGAT
10	Nam Phung Dam Floating Solar Project	30.0	Floating Solar	EGAT

Note: Map is illustrative and not drawn to scale

Source: Electricity Generating Authority of Thailand (EGAT), Arthur D. Little analysis

開発中の注目の発電所プロジェクト – EGAT取締役会の承認待ち(2/2)



#	Name	Capacity (MW)	Primary Fuel	Owner
11	Sirindhorn Dam Floating Solar Project 2	200.0	Floating Solar	EGAT
12	Sirindhorn Dam Floating Solar Project 3	248.0	Floating Solar	EGAT

Note: Map is illustrative and not drawn to scale

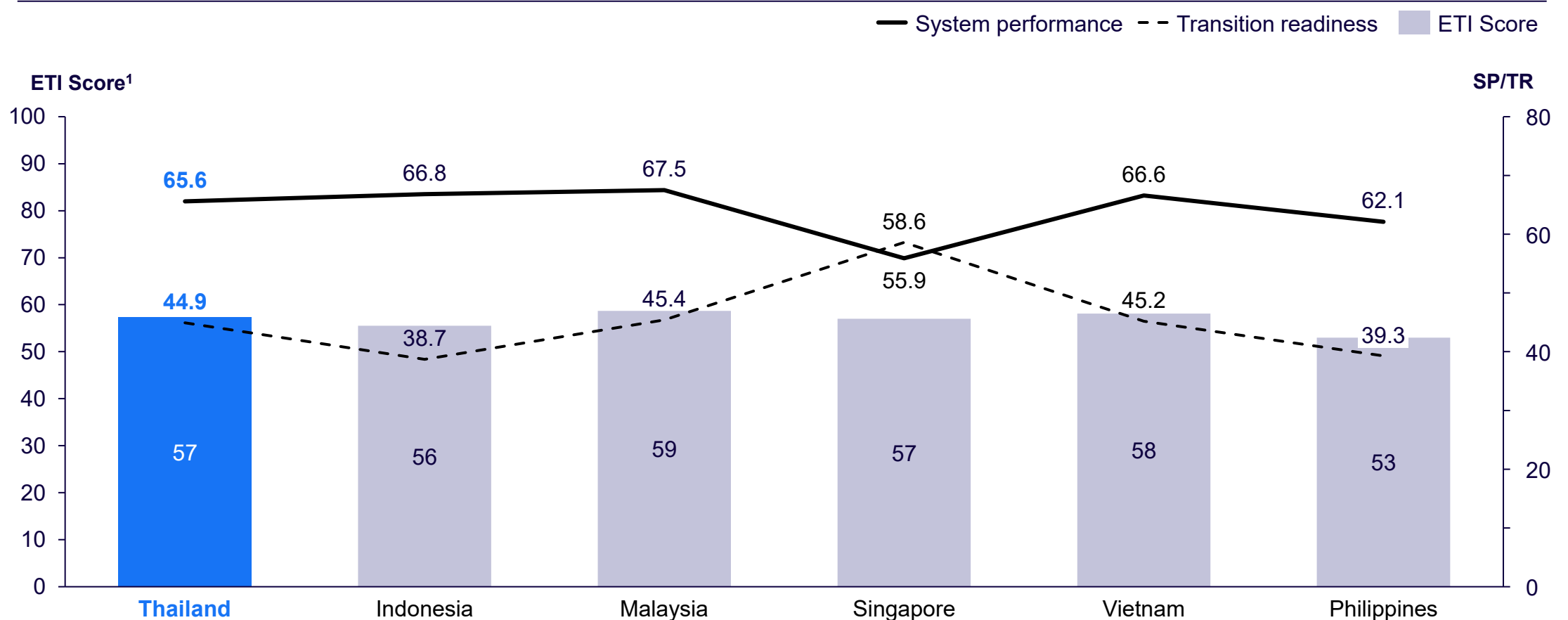
Source: Electricity Generating Authority of Thailand (EGAT), Arthur D. Little analysis

Contents

1. エネルギー構成・政策・監督機関
2. 化石エネルギー
3. パイプライン（ガス・石油）
4. 次世代・再生可能エネルギー
5. 発電事業者
6. 発電所
- 7. 電力品質**
8. 送電網
9. 電気料金
10. 電力需給状況

タイのETIスコア57は堅調なシステムパフォーマンスに支えられていますが、エネルギー移行を進展させるためにはトランジション準備度の強化が重要です

World Economic Forum's Energy Transition Index (ETI)



Note: 1) Energy Transition Index score consists of System Performance (60%) and Transition Readiness (40%).

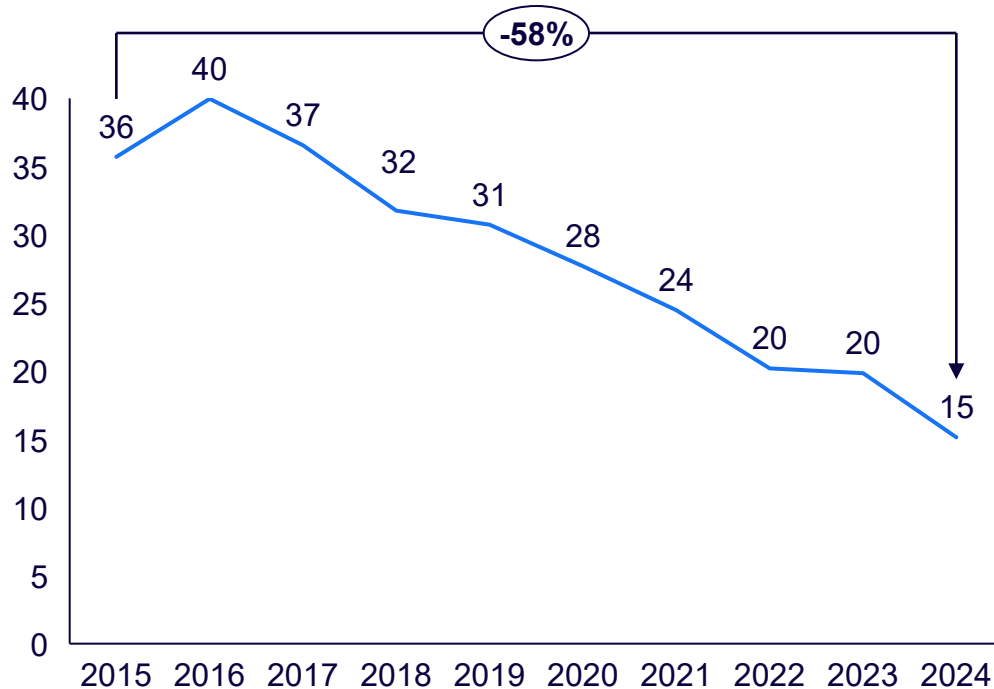
Source : World Economic Forum Report, *Fostering Effective Energy Transition 2025*

タイにおける電力の品質は、SAIDI および SAIFI で定義される指標に基づき、2015年以降大幅に改善しており、今後もこの傾向が続くと予想されている

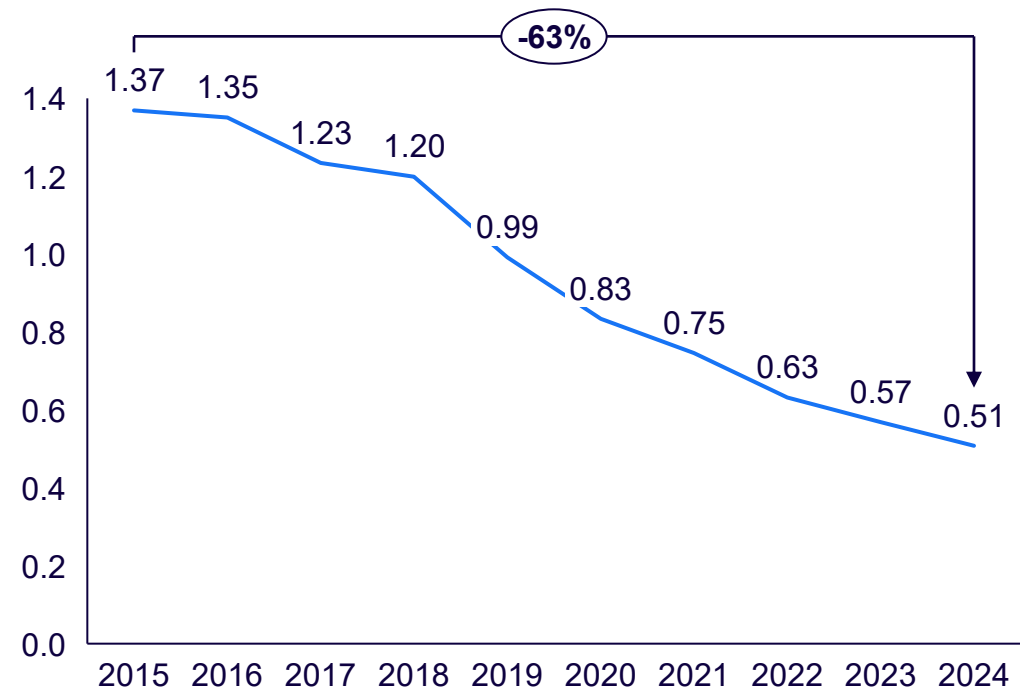
Electricity Quality Index

2015 – 2024

SAIDI¹



SAIFI²



Note: 1) SAIDI or System Average Interruption Duration Index represents the average outage duration (in minutes) over a one-year period 2) SAIFI or System Average Interruption Frequency Index represents the average number of interruptions per customer per one-year period
 Source: Metropolitan Electricity Authority (MEA), Arthur D. Little analysis

タイでは電カインフラの信頼性強化に向けスマートグリッド導入が進展。EGAT は送電の中枢を刷新し、MEA・PEA はスマートメータリングなどの導入を実施

Overview of Thailand Smart Grid Development Master Plan

- **Thailand’s Smart Grid Roadmap** (2015 – 2036) guides nationwide grid modernization to support reliability, RE/EV integration and efficiency
- A **multi-agency effort** involving EGAT¹, MEA² and PEA³, with different areas of focus for pilot projects
 - **EGAT:** grid modernization, big data, grid connectivity, demand response and renewable energy forecasting
 - **MEA:** Distribution system management, smart metering and supporting application for EV transition
 - **PEA:** Smart Energy, Smart Community, Smart Life



Security

Power Reliability and Quality

- Improved Reliability (e.g. SAIDI, SAIFI)
- Improved Power Quality (V, F)



Competitiveness

Economic and Industrial Stimulus

- Human Capacity Building
- Enhanced EMS for Competitiveness
- SG Technology, Product and Service Development & Export



Awareness

Integration and Interoperability

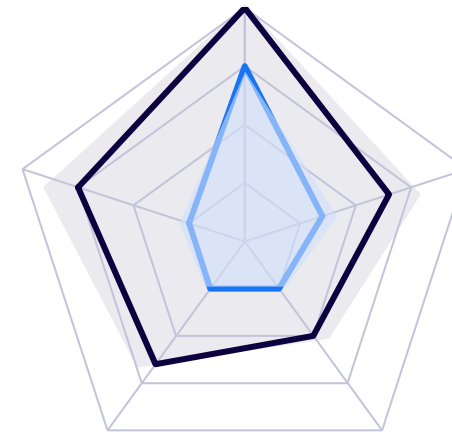
- Device and ICT Upgrading for Interoperability
- Accessibility and Interchangeability



Sufficiency

Energy Sustainability and Efficiency

- RE/Domestic Energy Dependency
- Improved Utility Asset Management
- Primary Energy Efficiency
- Microgrid Development



Efficiency

Utility Operation and Service

- Improved Quality of Services / New Services
- Work Process Efficiency

Note: 1) Electricity Generating Authority of Thailand; 2) Metropolitan Electricity Authority; 3) Provincial Electricity Authority
 Source: Desktop research, Power Development Plan 2018 (Revision 1), Arthur D. Little analysis

タイは持続可能で効率的かつグリーンな電力システムを目指し、スマートグリッド開発マスタープランの下で段階的に政策・実証・インフラ整備を進めている

Timeline of Thailand Smart Grid Development Master Plan

	Preparation (2015 – 2016)	Short Term (2017 – 2021)	Medium Term (2022 – 2031)	Long Term (2032 – 2036)
Mission	<ul style="list-style-type: none"> Prepare relevant policies to support comprehensive system development 	<ul style="list-style-type: none"> Develop pilot projects to test feasibility and cost-effectiveness Review and evaluate suitability for future implementation 	<ul style="list-style-type: none"> Develop various essential infrastructure to facilitate the transition to a modern power grid system 	<ul style="list-style-type: none"> Begin enhancing the capabilities of the power system Utilizing advanced technologies built on existing infrastructure
Target	<ul style="list-style-type: none"> Designate the main responsible agencies Define formats and revise connection requirements Support R&D 	<ul style="list-style-type: none"> Support research related to smart grids at pilot committee Formulate policies requiring electricity authorities¹ to invest in smart grid pilot projects 	<ul style="list-style-type: none"> Support smart grid infrastructure development Revise policies and regulations Encourage electricity authorities to invest in smart grid infrastructure 	<ul style="list-style-type: none"> Establish policies for electricity authorities to invest in advanced smart grid systems Supporting electricity users investing in technology installations
Operations	<ul style="list-style-type: none"> Operational models and responsible agencies were defined in the Short-Term Implementation Plan 	<ul style="list-style-type: none"> A DR business model was developed and pilot DR projects implemented (2022-23) Electricity forecasting developed, starting with SPPs 	<p>Currently, the implementation is underway in accordance with the medium-term action plan</p>	n/a

Note: 1) Including EGAT, MEA, and PEA

Source: Electricity Generating of Thailand (EGAT), Arthur D. Little analysis

タイは配電システム強化に向け、DR・EMS導入や再エネ予測、マイクログリッド拡大、蓄電池活用、EV充電・V2G対応、デジタル基盤整備を中期目標として推進

Key Milestones for Smart Grid Development Action Plan: Medium Term

	Description	Progress
DR & EMS	<ul style="list-style-type: none"> The use of Semi-Auto DR and Auto DR covering all types of electricity consumers e.g. Ready to use DR in power system in possible service 	<ul style="list-style-type: none"> EPPO opened applications for the DR program in 2022-23 with EGAT serving as DRCC and MEA/PEA acting as Las
RE Forecast	<ul style="list-style-type: none"> Achieving implementation of RE generation forecasting system, covering SPP and VSPP as well as Prosumer-Aggregators 	<ul style="list-style-type: none"> EGAT is able to forecast electricity generation from all wind and solar power plants under SPP category EGAT launched RE forecast center
MG & Prosumer	<ul style="list-style-type: none"> RE base MG/Prosumer has occurred. Commercial as BAU (Community & Industry) support High RE, EV areas and Demonstration VPP model 	<ul style="list-style-type: none"> Authorities have completed 4 pilot Microgrid projects EPPO has conducted a study on promoting net-zero energy microgrid systems in government facilities
ESS	<ul style="list-style-type: none"> Use of all types of ESS services Widespread use in Utility Scale & BTM including connecting the BTM ESS in grid system to provide electrical services 	<ul style="list-style-type: none"> EGAT installed ESS at Bamnet Narong and Chaibadan Power Station PEA pilot installation ESS in Chiang Mai, MEA pilot installation ESS (in process) in Bangkok
EV Integration	<ul style="list-style-type: none"> Readiness of power system infrastructure support high EV penetration including the use of Smart Charge and V2G 	<ul style="list-style-type: none"> EPPO completed a study on EV data mgmt. approaches EGAT tested V2H and V2G to control energy transfer between EVs and the power grid via smart chargers
Others	<ul style="list-style-type: none"> Development and integration of connection grid & digital infrastructure (New business model and capacity development in domestic) 	<ul style="list-style-type: none"> MEA and PEA gradually installing AMI for consumers EPPO developing system to monitor smart grid implementation progress

EGATはスマートグリッド実証を進めておりマイクログリッド建設、太陽光蓄電システム、需要応答テストなどを実施中で、今後は再エネ統合型やバイオガス発電所なども計画

EGAT Smart Grid Roadmap

Existing and Proposed Sub-Projects

	Preparation	Pilot project	Deployment	Enhancement
	2014-2015	2016-2020	2021-2025	2026-2030
Restructure ICT Org	ICT policy and strategy refinement	Restructuring ICT organization		
QoS-Cyber Integrity	Establishing cyber security standard	ICT infrastructure improvement with QoS and integrity		
Dev-ICT Integration	Establishing device-ICT integration standard	Pilot device-ICT integration	Expanding to all areas of integration	
Standardized ICT	Establishing ICT interconnection standard	Pilot ICT interconnection	Expanding to all areas of interconnection	
TEC61850 SAS	Pilot IEC61850-SAS for WAMS/WAPC	SAS for WAMS/WAPC	Other SAS, including IPP&SPP implementation (if necessary)	
RCC EMS	RCC-EMS design	RCC-EMS with Volt/Var (Q-V) Control	RCC-EMS & WAMS/WAPC integration	RCC-EMS for balancing real-power & islanding operation
Optimized Asset	On-line monitoring & CBM design	PP & 500 kV monitoring & risk analysis-reliability issue	Enhancing SAP for AM with extended monitoring & CBM	Risk analysis enhancement-financial & corporate issues
Demand Forecast		Demand monitoring development	Demand forecast & pilot integration to EMS	Full-scale demand forecast integration to EMS
Standardized AMI	Establishing AMI interconnection standard	Pilot AMI interconnection	Establishing ASEAN standard for AMI interconnection	
Demand Response	DR policy development (National agenda)	Pilot DR integration to EMS	Full-scale DR integration to EMS	DR enhancement
Small RE Generation	RE generation (PDP2010 and CPP)	RE generation (PDP2010)	RE generation (PDP2010)	RE generation (PDP2010)
RE Grid Codes	Structural harmonization of RE grid codes	Technical harmonization of RE grid codes		
RE Forecast	RB monitoring development	RE forecast & pilot integration to EMS	Full-scale RE forecast integration to EMS	
Energy Storage Mgmt	Pilot battery energy storage system	Pump-hydro storage in neighboring countries	Full-scale ICT infrastructure for energy storage management	Full-scale energy storage integration to EMS
EV Support	Establishing EV charging standard (National agenda)	Pilot smart charging for load management	Pilot V2G technology	V2G technology deployment
GMS-APGEVA	Human resource enhancement	Establishing overseas business units	Being the leader for Smart Grid within GMS-APG	
WAMS HVDC	Pilot WAMS/WAPC	Full-scale WAMS & readiness for GMS-APG extension	Full-scale WAMS/WAPC integration to EMS	WAMS/WAPC for GMS-APG

Existing

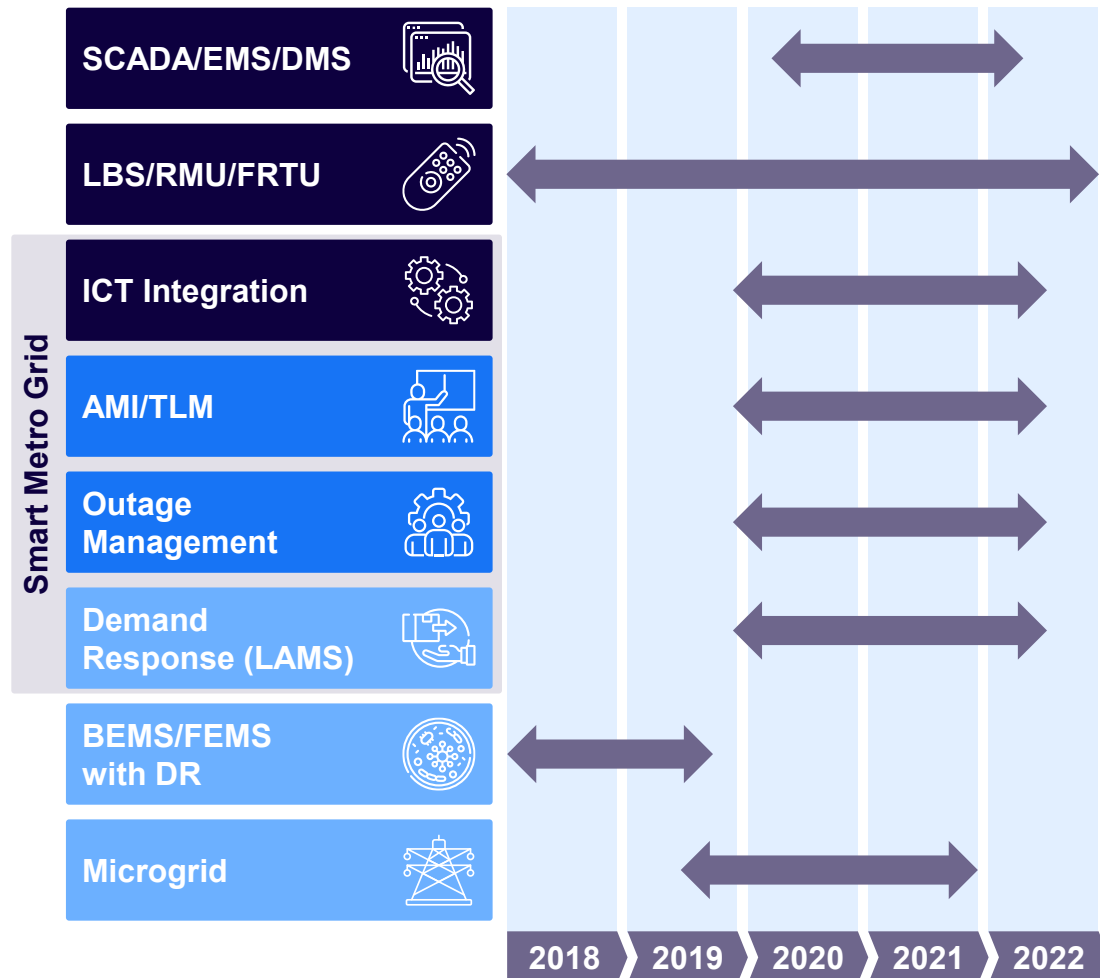
- Mae Hong smart grid project with Italthai Engineering
 - Purchase and construction contract signed in Jun 2022, which will be connected to every power plant in the province via Micro grid Control Center System, adding to green tourism in the province
- Solar power battery storage system
 - 3 MW system developed to combat the many power outage problems occurring in the Mae Hong Son province
- Collaboration with Hitachi and Chulalongkorn University
 - Demand response test to build a system that can support the increased use of renewables

Proposed

- Integrated renewable energy power plant
 - A hydropower plant that includes floating solar, battery storage and hydro pump system all-in-one
- 1 community 1 power plant
 - Initial concept involves the development of a biogas power plant that is run on pig waste, which are fed napier grass that is grown on the same farm

Smarter Green Sustainable

タイのMEAは、配電管理更新やスマートメーター導入に加え、マイクログリッドや蓄電システムの実証を通じて効率的で無駄のないスマートグリッド構築を進めている



Existing and Proposed Sub-Projects

Existing

- Replacement of DMS¹
 - Allows for the increase in control capability of feeder in 12 kV and 24 kV substations and communicates via the RTU² for monitoring and control
- Advanced metering infrastructure project
 - Replacement of 33,265 existing meters which would allow customers to manage and receive automatic readings of energy usage
- Expanded power distribution system
 - Via automatic functions like LTO³, CTO⁴, LTF⁵ and BTO⁶ whilst retaining the total quality management approach
- Household solar scheme purchase of 30 MW total at 0.06 USD/unit⁷
- Electricity purchase from Waste-to-Energy plants with 30.34 MW capacity

Proposed

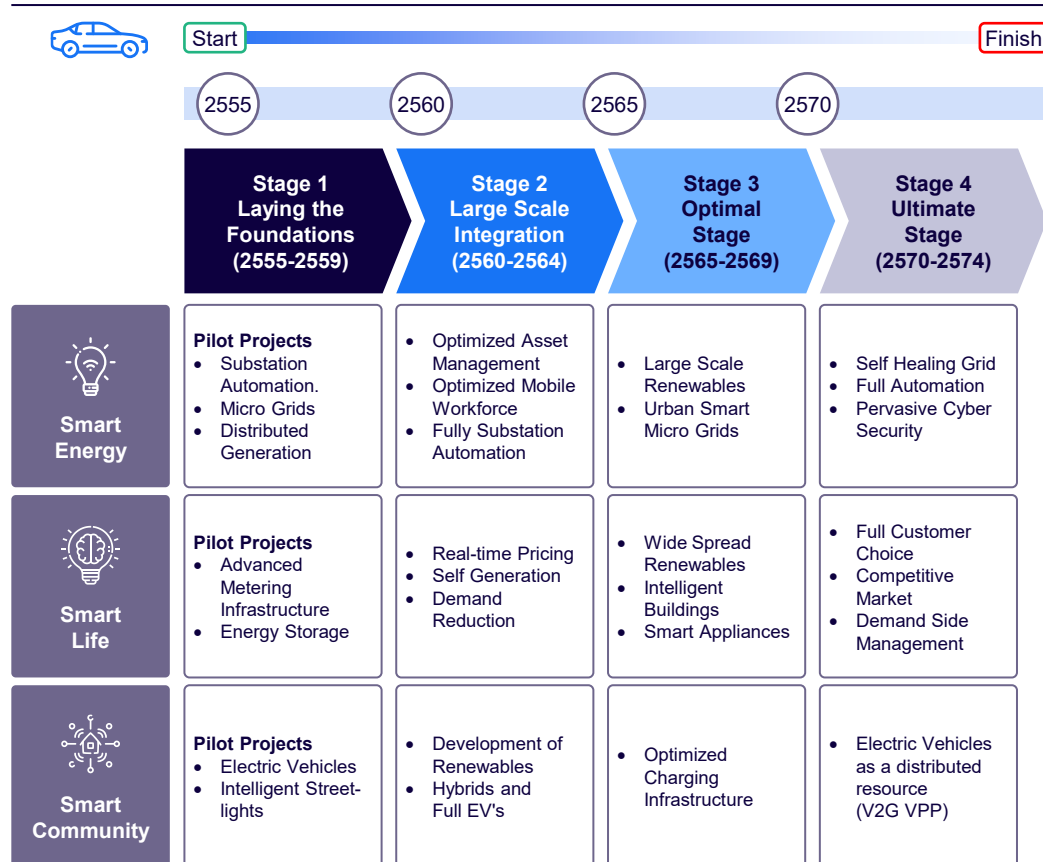
- Load aggregator management system project
- MEA microgrid system pilot project
- Energy storage system pilot project
- SENA village renewable energy pilot project

Note: 1) Distribution management system; 2) Remote terminal unit; 3) Line throwover scheme; 4) Couple throwover scheme; 5) Line transfer function; 6) Bus throwover scheme; 7) Exchange rate is 1 THB = 0.029 USD (2022 2 d.p. average)

Source: Power Development Plan 2018 (Revision 1), Government press release 2022, Multiple news sources, Arthur D. Little analysis

タイのPEAは、通信インフラやスマートメーター更新からAI連携アプリや再エネ活用まで多角的なスマートグリッド施策を展開し、クリーンエネルギー移行を支援している

PEA Smart Grid Roadmap (Under Revision)



Existing and Proposed Sub-Projects

Existing

- Collaboration with Huawei
 - Upgrade of wireless communication infrastructure including SCADA1 using Huawei’s eLTE-DSA2 solution, resulting in increase speed, capacity, security, and reliability across its services.
- Smart Grid Project in Pattaya
 - Country’s first smart grid electricity project costing USD 27.9 mn, to replace smart meters in 0.12 mn houses in the city, and the construction of a data centre to process all forms of communication
- VOLTA charging stations
 - 57/263 EV charging stations completed in 2023 with the goal to have 1 charging station ever 100km

Proposed

- Solar roofs on 204 PEA office building
- Net Zero Energy Building project
- JV with Finland to open a power plant in Rayong
- IHAPM app that allows users to monitor and control their electrical appliances via a phone, together with AI which detect anomalies

Note: 1) Supervisory Control and Data Acquisition (SCADA) system is used to control and monitor power distribution, enabling accurate and rapid fault detection, as well as remote power management and maintenance; 2) eLTE Discrete Spectrum Aggregation (eLTE-DSA)

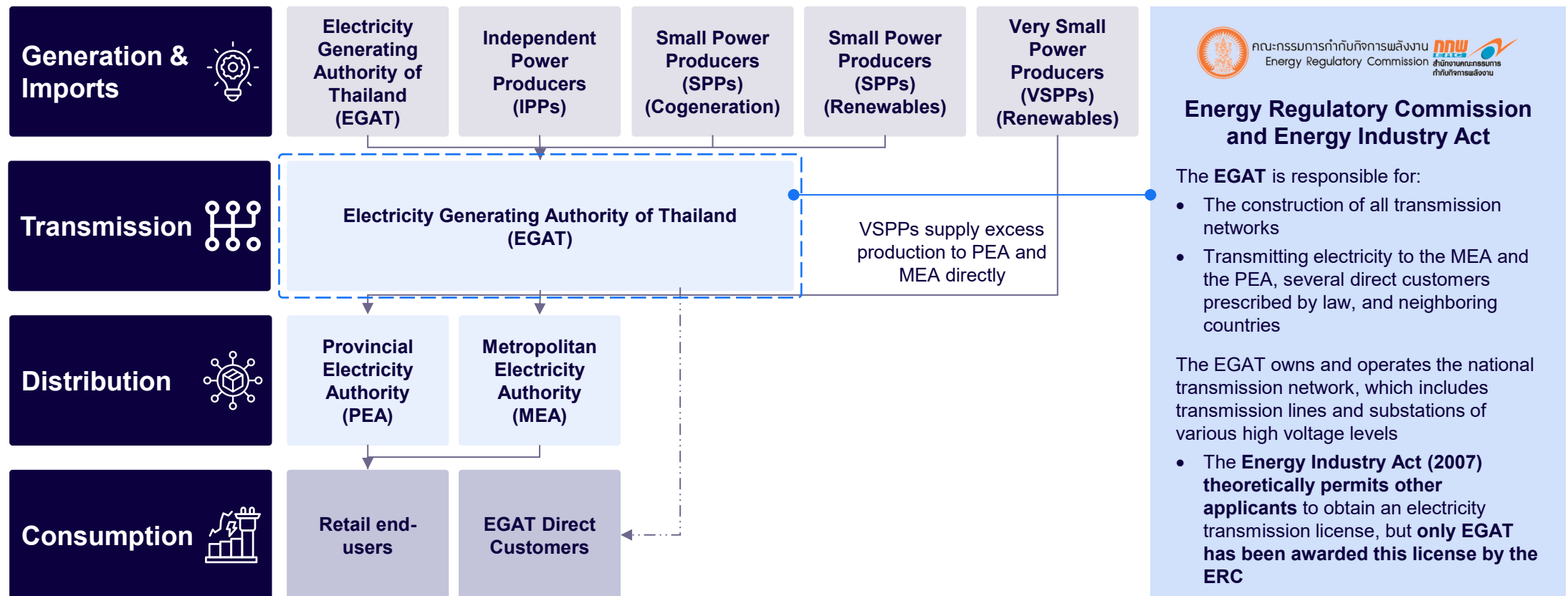
Source: Power Development Plan 2018 (Revision 1), Government press release 2022, Multiple news sources, Arthur D. Little analysis

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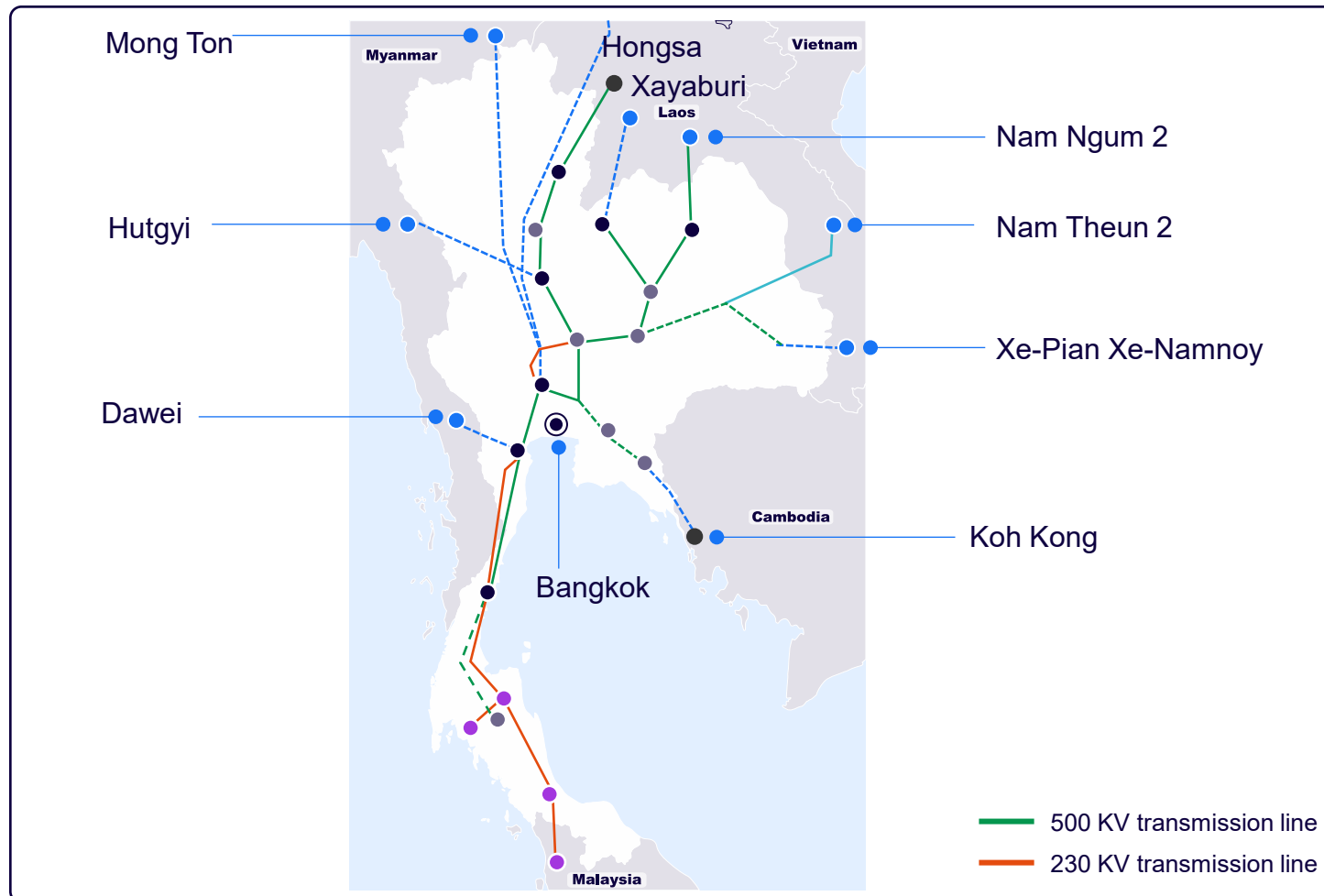
1. エネルギー構成・政策・監督機関
2. 化石エネルギー
3. パイプライン（ガス・石油）
4. 次世代・再生可能エネルギー
5. 発電事業者
6. 発電所
7. 電力品質
- 8. 送電網**
9. 電気料金
10. 電力需給状況

タイの送電網は、エネルギー規制委員会（Energy Regulatory Commission）によって許可された唯一のライセンサーであるEGATによって運営

Overview of the Electricity Transmission Sector



タイの送電網は概ね堅牢で信頼性が高い一方、中部や首都圏では複数回線で負荷を支えるのに対し、地理的に半ば孤立した南部は他地域との連系が限られ安定運用上の課題が存在



COMMENTS



- In general, Thailand's transmission grid appears to be **relatively robust and reliable**
- Multiple transmission circuits supply the major load centers in different regions, particularly in the central and metropolitan areas
- The **southern region of Thailand is perhaps the most challenging region** for maintaining reliable system operation and stability, due to its partly electrically isolated geography. This only allows for radial connections with the central regions **without the possibility to connect to other regions** for enhanced system stability and security

Note: Map is illustrative and not drawn to scale

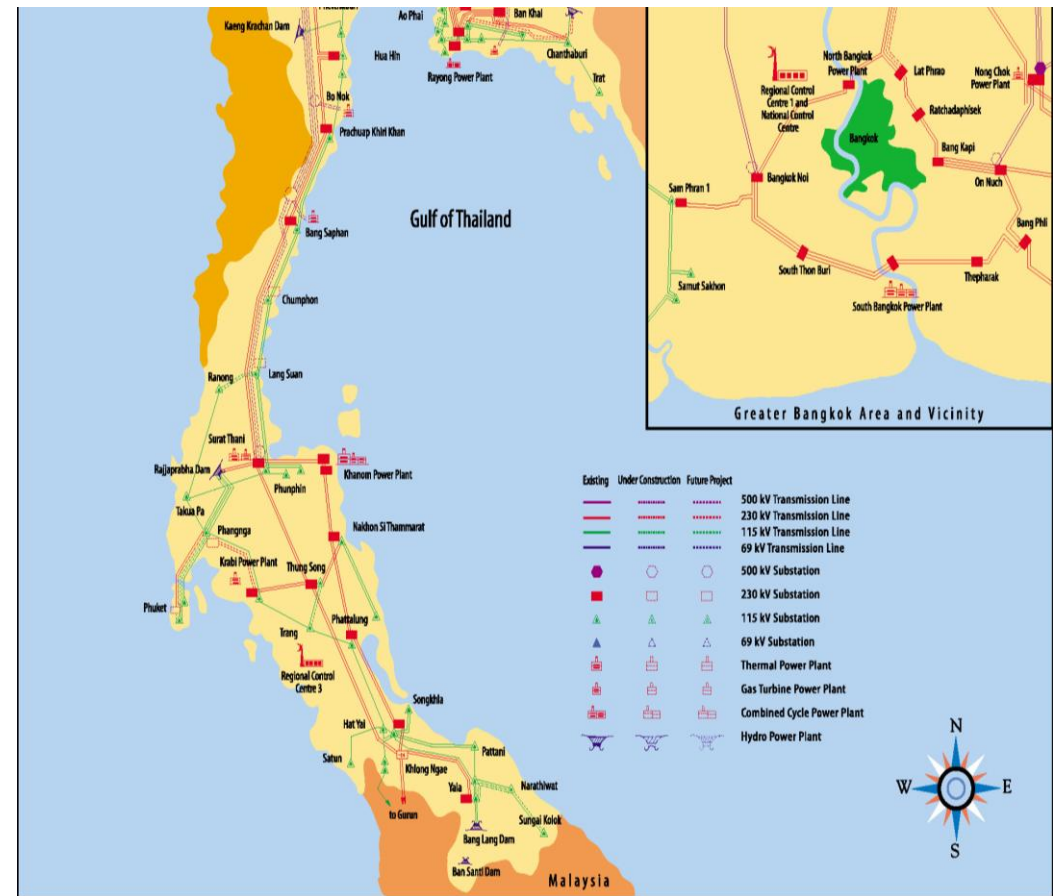
Source: International Energy Agency, Arthur D. Little analysis

タイ全国送電網 - 詳細概略図

Central & Northern Thailand



Southern Thailand



EGAT送電システムおよび変電所開発プロジェクト一覧(1/3)

#	Project	Location	Description	Estimated Cost (USD)	Completion Rate	Expected Completion
1	Transmission System Improvement Project (Northeast / Lower North / Central / Bangkok) (TIEC)	Northeast, Lower North, Central, Bangkok Metropolis	New 1,421 c-km TL, 1 substation; expand 16 subs; install 10,000 MVA transformers	~2,650 mn	30%	2028
2	Transmission System Improvement Project in Eastern Region (TIPE)	Eastern Thailand	Build 365 c-km TL, 3 new subs; expand 3 subs; add 4,000 MVA transformers	~592 mn	46%	2027
3	Transmission System Improvement Project in Western & Southern Regions (TIWS)	Western & Southern Thailand	2,198 c-km TL, 1 new sub; expand 5 subs; install 2,000 MVA; add 1,164 Mvar capacitor bank	~1,780 mn	74%	2026
4	Transmission System Expansion Project, Phase 12 (TS12)	Nationwide	3,366 c-km TL; 9 new subs; expand 126 subs; install 27,601 MVA transformers; add capacitors and SVC	~1,690 mn	79%	2025

Note: 1) Progress as of December 2023

Source: Electricity Generating Authority of Thailand, Arthur D. Little analysis

EGAT送電システムおよび変電所開発プロジェクト一覧(2/3)

#	Project	Location	Description	Estimated Cost (USD)	Completion Rate	Expected Completion
5	Bulk Power Supply for Greater Bangkok Area, Phase 3 (GBA3)	Greater Bangkok Area	266.9 c-km TL; 2 new subs; expand 4 subs; install 6,000 MVA; add 576 Mvar capacitors and other works	~341 mn	78%	2026
6	Transmission System Renovation & Expansion, Phase 2 (RTS2)	Nationwide	1,368 c-km TL; construct/expand 42 subs; install 5,240 MVA transformers	~617 mn	88%	2026
7	Transmission System Renovation & Expansion, Phase 1 (RLP1)	Nationwide	1,716 c-km TL; expand 12 subs; upgrade aged lines	~278 mn	96%	2025
8	Main Transmission System Expansion for SPP Cogeneration (SPPC)	Nationwide	484.5 c-km TL; 1 new sub	~229 mn	92%	2025

Note: 1) Progress as of December 2023

Source: Electricity Generating Authority of Thailand, Arthur D. Little analysis

EGAT送電システムおよび変電所開発プロジェクト一覧(3/3)

#	Project	Location	Description	Estimated Cost (USD)	Completion Rate	Expected Completion
9	Transmission System Renovation / Expansion (mid-sized unnamed project)	Nationwide	Approx. 170 c-km TL; 2 subs; expand 3 subs; install 1,000 MVA transformers	~224 mn	77%	<i>n/a</i>
10	System Improvement (15 substations)	Nationwide	Construction/renovation of 15 substations; 50 MVA transformers; 15 Mvar capacitor	~107 mn	91%	2024

Note: 1) Progress as of December 2023

Source: Electricity Generating Authority of Thailand, Arthur D. Little analysis

EGAT送電システムおよび変電所開発プロジェクト一覧- 承認済みおよび建設中 (1/2)

#	Project ¹	Expected Completion
1	Transmission System Renovation Plan for Power Purchase from SPP Firm Cogeneration with Contract Period Ending by 2019-2025 (TSFC)	2024
2	Transmission System for Hydro-Floating Solar Hybrid Project of Ubol Ratana Dam (URS1)	2024
3	Transmission System Renovation and Expansion Project, Phase 1: Substation (RSP1)	2025
4	Transmission System Renovation and Expansion Project, Phase 1: Transmission Line (RLP1)	2025
5	Main Transmission System Expansion Project for Power Purchase from SPP Cogeneration Power Plants Based on Request for Proposal 2010 (SPPC)	2025
6	Transmission System Development Project for Power Purchase from Independent Power Producers (IPPP)	2026
7	Transmission System Development for Power Purchase from Small Power Producers, Phase 1 (SPP1)	2026
8	Transmission System Renovation and Expansion Project, Phase 2 (RTS2)	2027
9	Transmission System Improvement Project in Upper Northern Region to Enhance System Security (TIPN)	2027
10	Transmission System Expansion Project, Phase 12 (TS12)	2027

EGAT送電システムおよび変電所開発プロジェクト一覧- 承認済みおよび建設中 (2/2)

#	Project ¹	Expected Completion
11	Bulk Power Supply for the Greater Bangkok Area, Phase 3 (GBA3)	2028
12	Transmission System Improvement Project in Eastern Region to Enhance System Security (TIPE)	2028
13	Transmission System Improvement Project in the Western and Southern Regions to Enhance System Security (TIWS)	2028
14	Submarine Cable Development Project to Koh Samui District in Surat Thani Province to Enhance System Security (SPSS)	2029
15	Substation Improvement Plan for System Connection in Compliance with EGAT's Connection Code (SICC)	2029
16	Transmission System Improvement Project in the Northeast, Lower North, and Central Region including Bangkok to Enhance System Security (TIEC)	2031
17	Transmission System Improvement Project in Lower Southern Region to Enhance System Security (TILS)	2032

EGAT送電システムおよび変電所開発プロジェクト一覧- 承認提案予定

#	Project ¹	Expected Completion
1	Transmission System for Floating Solar Projects of EGAT Dams	2027 onwards
2	Transmission System for North Bangkok Power Plant (Additional) Project, Phase 1 (NBA1)	2027
3	Transmission System for South Bangkok Power Plant (Additional) Project (SBA1)	2028
4	Transmission System Improvement Project to Accommodate the Renewable Power Purchase (TIRP)	2028
5	Transmission System Development for Special Economic Zone Project, Phase 1 (SEZ1)	2028
6	Transmission System Development in the Area of Loei, Nong Bua Lam Phu, and Khon Kaen Provinces for Power Purchase from Lao PDR Projects, Phase 2 (LNK2)	2030
7	Transmission System Development in the Area of Nan, Phrae, and Uttaradit Provinces for Power Purchase from Lao PDR Projects (NPUP)	2031
8	Bulk Power Supply for the Greater Bangkok Area, Phase 4 (GBA4)	2031
9	Transmission System Renovation and Expansion Project, Phase 3 (RTS3)	2031
10	Transmission System Renovation and Expansion Project, Phase 4 (RTS4)	2031

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2. 化石エネルギー
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6. 発電所
7. 電力品質
8. 送電網
- 9. 電気料金**
10. 電力需給状況

タイではエネルギー価格が厳格に規制されており、政府は燃料基金による補助金、ディーゼル・LPG価格上限、電気料金調整などを通じ国民生活や事業への影響緩和を図っている

Overview of Current Energy Subsidy Schemes in Thailand



Category	Details
State Fund Fuel Subsidies	<ul style="list-style-type: none"> In Feb 2023 the cabinet approved THB 81.2 bn of new borrowing, bringing Oil Fuel Fund Office's (OFFO) FY2023 borrowing to THB 110 bn (~USD 3.2 bn) Thailand uses the fund to support subsidies and manage oil prices Fund is to continue through 2024 – 2025 to manage diesel / LPG prices; government has committed to holding diesel to <1.02 USD per L
Excise Taxes	<ul style="list-style-type: none"> Elimination of excise tax on diesel and bunker oil for electricity generation until March 2023 As of the 2025, this has since lapsed; it was a temporary measure to curb 2022 – 2023 price shocks
Price Caps	<ul style="list-style-type: none"> In 2022, Thailand introduced a diesel price cap of USD 0.92 per L¹ to manage prices for end-consumers Nevertheless, the strict < USD 0.92 has been revised to <1.02 USD per L, in addition to other measures, such as LPG price freeze and trimming electricity charges

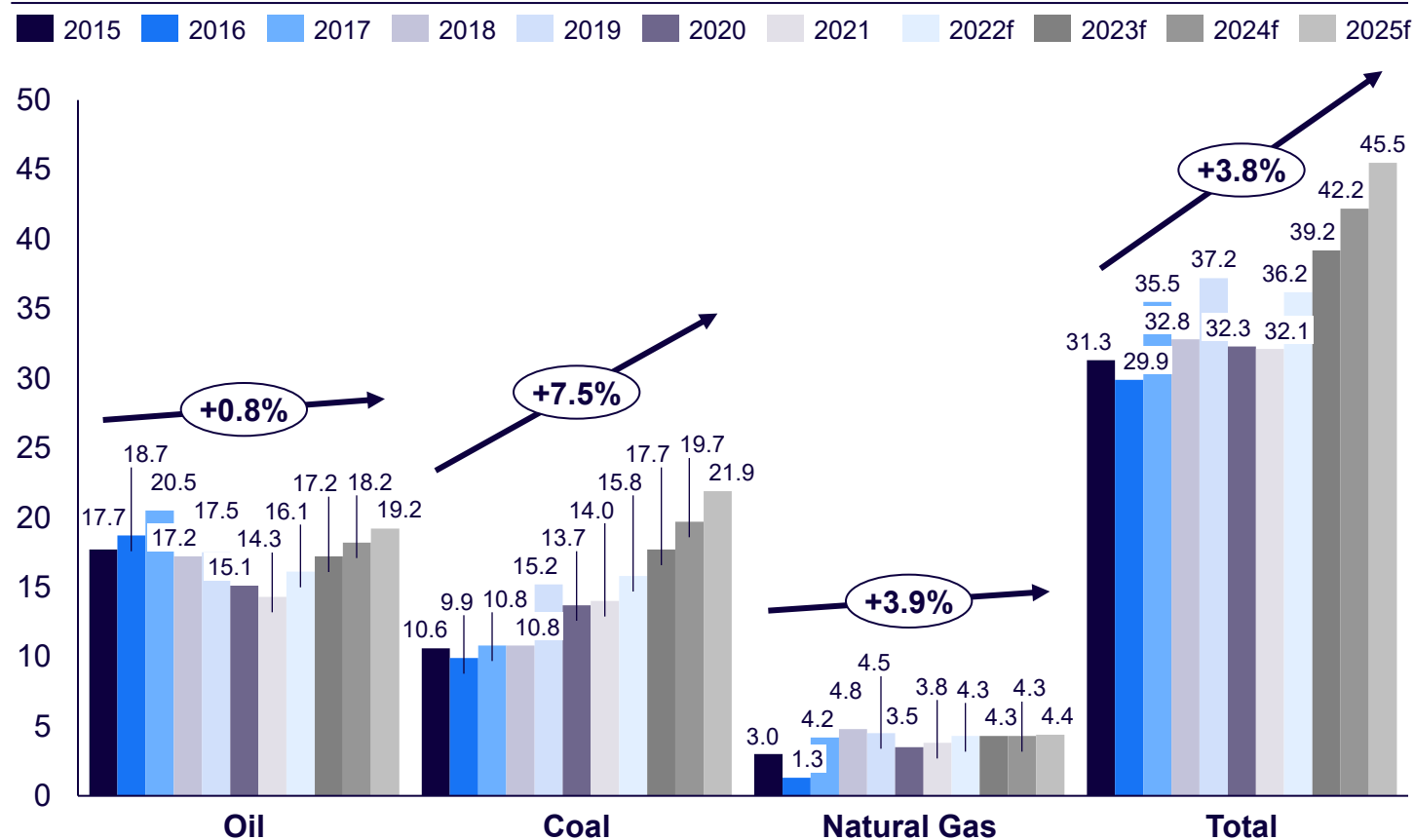
Current deployment of energy subsidies in Thailand appears to be targeted at **managing cost-of-living and business concerns**

Note: 1) Exchange rate is 1 THB = 0.031 USD
 Source: International Energy Agency, Reuters, The Nation, Arthur D. Little analysis

タイの化石燃料補助金は2015～2025年にかけて増加傾向にあり、特に石炭向け補助金が年平均7.5%と最も高い伸びを示し、石油と天然ガスは比較的緩やかな増加にとどまっている

Fossil Fuel Subsidies by Energy Source

2015 – 2025f, USD Bn



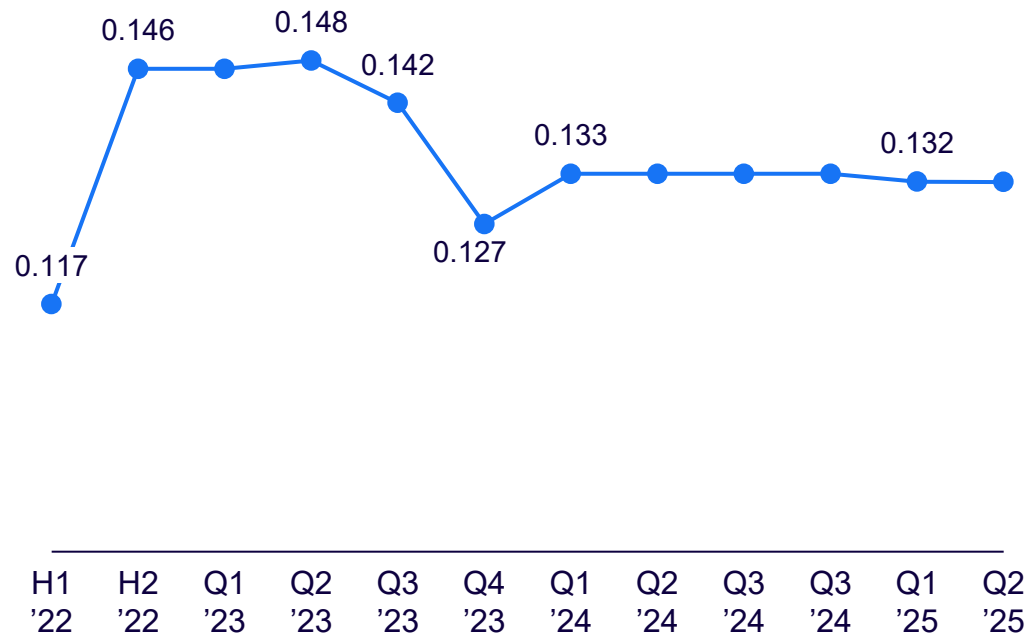
Comments

- **Coal is largely driving the overall subsidies** for the period 2015 – 2025, at a CAGR of 3.8%. However, the increase of USD 10 bn from USD 36.2 in 2021 to 42.2 bn in 2023 was on the back of the fight against inflation
- **Despite the lack of dependency on coal as a fuel source, subsidies are estimated to grow almost two-fold** at a YOY growth rate of 7.5% from USD 10.6 bn in 2015 to USD 21.9 bn in 2025
- The increase of ~50% from 2014 to 2025 is largely due to Thailand switching to coal for domestic electricity generation, instead of importing
- **Oil & gas saw moderate increases** of 0.8% and 3.9% respectively, especially if we look past the inflationary periods. This stems from the government pushing for decreased consumption and reliance on fossil fuels, on top of dwindling reserves

タイの電力料金は現在、国内では記録的な高水準にあるが、ASEAN主要国の中では平均的な水準にとどまっている

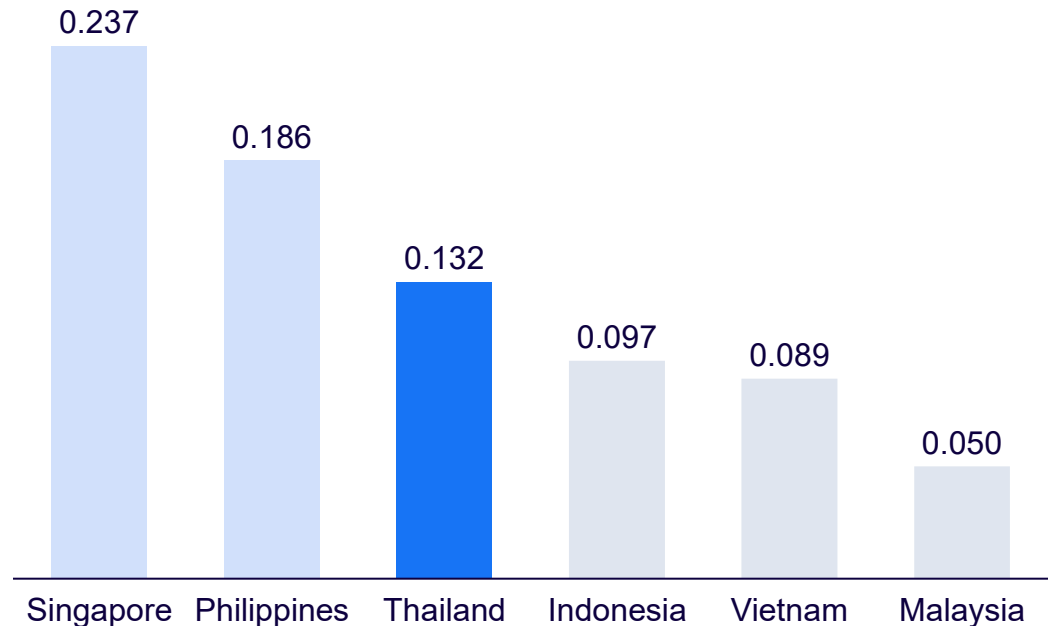
Average Household Electricity Retail Price¹

Average household retail prices in Thailand, in USD per kWh



Household Electricity Retail Prices in SEA²

Household electricity retail prices as of Dec 2024, USD per kWh



Thailand's household electricity retail prices have **stabilized** at around USD 0.132 per kWh in 2024–2025, **following sharp increases in 2022–2023** driven by elevated global energy prices and high LNG import dependency amid constraints in domestic gas production.

Note: 1) Exchange rate is 1 THB = 0.031 USD 2) Prices for households referenced, for selected SEA countries. For households, the displayed number is calculated at the average annual level of household electricity consumption

Source: Bangkok Post, Thai Enquirer, Global Petrol Prices, Arthur D. Little analysis

タイの家庭向け電気料金は消費量に応じた段階料金制で、さらに時間帯別料金（ピーク時は0.15～0.17 USD/kWh、オフピーク時は0.07～0.08 USD/kWh）が設定されている

Residential Electrical Tariffs
as of August 2025

Normal tariff with consumption not exceeding 150 kWh/month ¹		
First 15 kWh (1st – 15th)	0.07	USD/kWh
Next 10 kWh (16th – 25th)	0.09	USD/kWh
Next 10 kWh (26th – 35th)	0.09	USD/kWh
Next 65 kWh (36th – 100th)	0.11	USD/kWh
Next 50 kWh (101st – 150th)	0.11	USD/kWh
Next 250 kWh (151st – 400th)	0.12	USD/kWh
Over 400 kWh (up from 401st)	0.13	USD/kWh
Service charge (USD/Month) :	0.24	

Normal tariff with consumption exceeding 150 kWh/month ¹		
First 150 kWh (1st – 150th)	0.09	USD/kWh
Next 250 kWh (151st – 400th)	0.12	USD/kWh
Over 400 kWh (up from 401st)	0.13	USD/kWh
Service charge (USD/Month) :	0.72	

Time of use tariff ²			
	Energy charge, USD/kWh ¹		Service charge, USD/month ¹
	On Peak	Off Peak	
12 - 24 kV	0.15	0.08	9.07
Below 12 kV	0.17	0.07	0.72

Note: 1) Exchange rate is 1 THB = 0.029 USD (2022 2 d.p. average); 2) On Peak: Monday – Friday from 09.00 AM to 10.00 PM; Off Peak: Monday – Friday from 10.00 PM to 09.00 AM, Saturday – Sunday, and normal public holiday
Source: Metropolitan Electricity Authority of Thailand (MEA), Arthur D. Little analysis

タイの事業者向け電力料金は規模・電圧レベルによって細分化され、小規模事業は段階別従量制、中・大規模事業は電力量料金に加えてピーク時や電圧別の需要料金が課される

Business Electrical Tariffs
as of August 2025

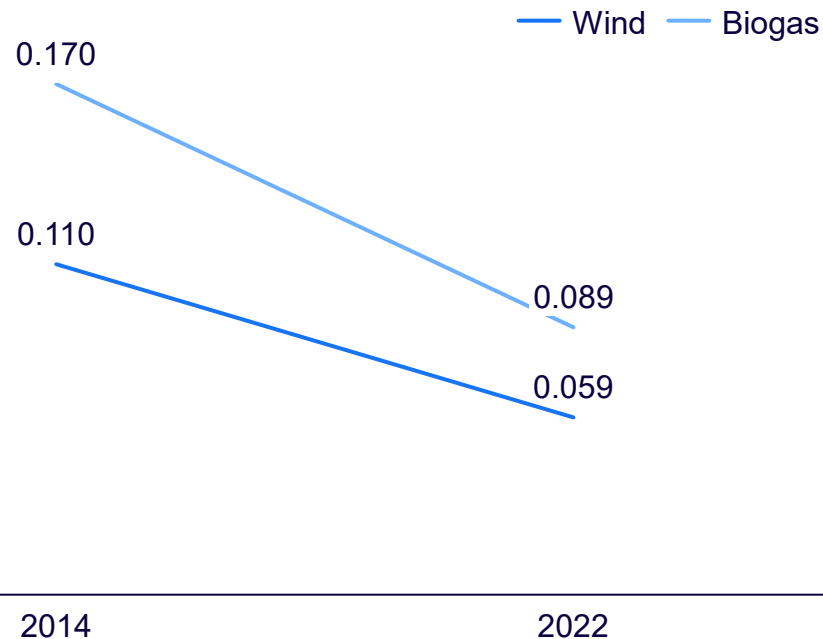
Small general service ¹			Medium general service ³			
Voltage level	Energy charge, USD/kWh ²	Service charge, USD/month ²	Voltage level	Demand charge, USD/kW ²	Energy charge, USD/kWh ²	Service charge, USD/month ²
12 - 24 kV	0.11	9.07	69 kV and over	5.10	0.09	9.07
Below 12 kV		0.97	12-24 kV	5.70	0.09	9.07
First 150 kWh (1st – 150th)	0.09		Below 12 kV	6.43	0.09	9.07
Next 250 kWh (151st – 400th)	0.12					
Over 400 kWh (up from 401st)	0.13					
Large general service ⁴						
Voltage level	Demand charge, USD/kW ²			Energy charge, USD/kWh ²	Service charge, USD/month ²	
	On Peak 06.30 PM to 09.30 PM	Partial Peak 08.00 AM to 06.30 PM	Off Peak 09.30 PM to 08.00 AM			
69 kV and over	6.51	0.87	0	0.09	9.07	
12 - 24 kV	8.28	1.71	0	0.09	9.07	
Below 12 kV	9.66	1.98	0	0.09	9.07	

Note: 1) A business enterprise with a maximum 15-minute integrated demand of less than 30 kilowatt through a single Watt-hour meter; 2) Exchange rate is 1 THB = 0.029 USD (2022 2 d.p. average); 3) Organizations with a maximum 15-minute integrated demand from 30 to 999 kilowatts; 4) Organizations with a maximum 15-minute integrated demand over 1,000 kilowatts
Source: Metropolitan Electricity Authority of Thailand (MEA), Arthur D. Little analysis

タイではバイオガスや風力の固定価格買取制度（FiT）が時間とともに引き下げられる一方で、再生可能エネルギー由来の発電量は2015年以降大きく増加している

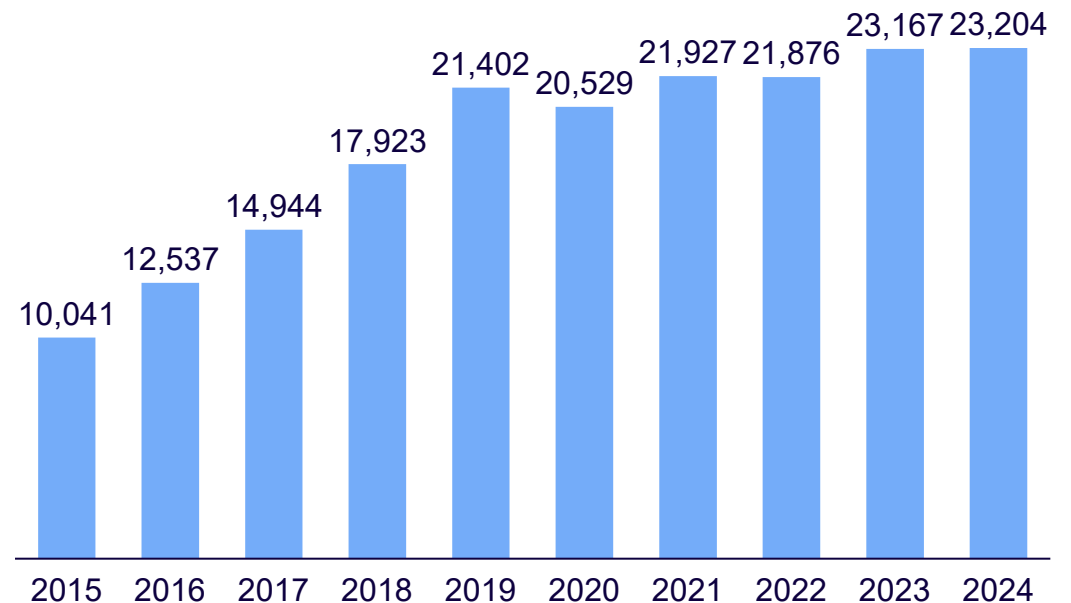
Trends in Feed-in Tariffs

Feed-in tariffs for biogas and wind, in USD / kWh¹



Renewables² Energy Power Generation

Renewable power generation output, in GWh



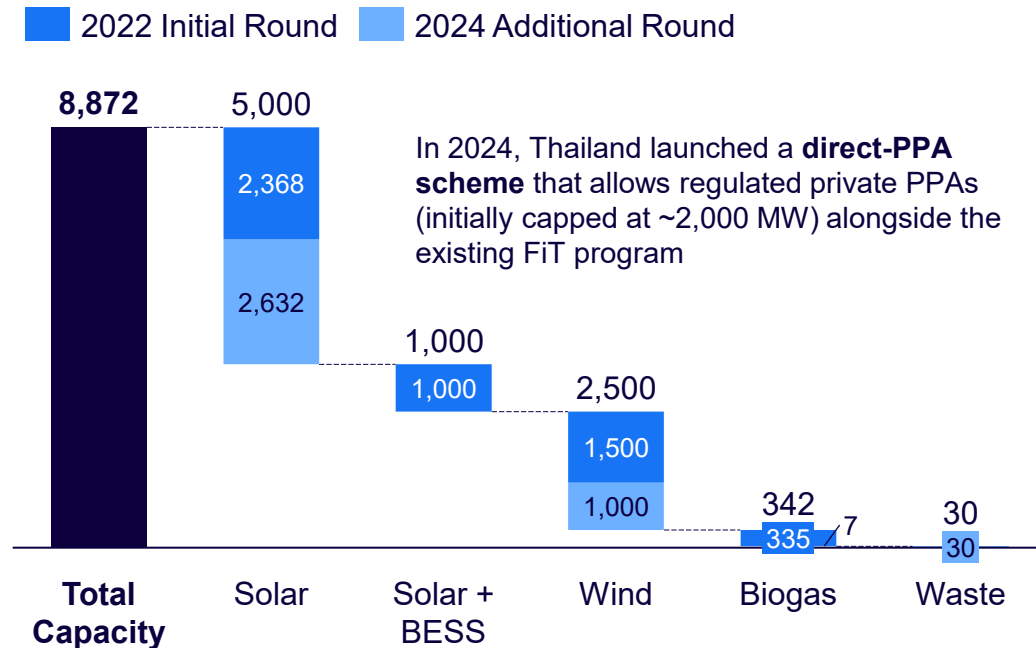
FiT rates often **decline with time** to cater for increased capacity and maturing technology, after attracting initial investment capital. This is likely the case for Thailand, witnessed by the **increased power generation from renewables**

Note: 1) Exchange rate is 1 THB = 0.029 USD (2022 2 d.p. average) and excludes FiT premiums for projects located in the Southern provinces; 2) Renewables include solar, wind, and biomass renewable energy sources – and are grouped separately from hydropower in official government reports
Source: Energy Policy and Planning Office (EPPO), Watson Farley & Williams, International Energy Agency, Arthur D. Little analysis

タイの2022～2030年FiTスキームでは新規導入容量の中心は太陽光で、風力や太陽光+蓄電池には比較的高いFiT単価が設定されている

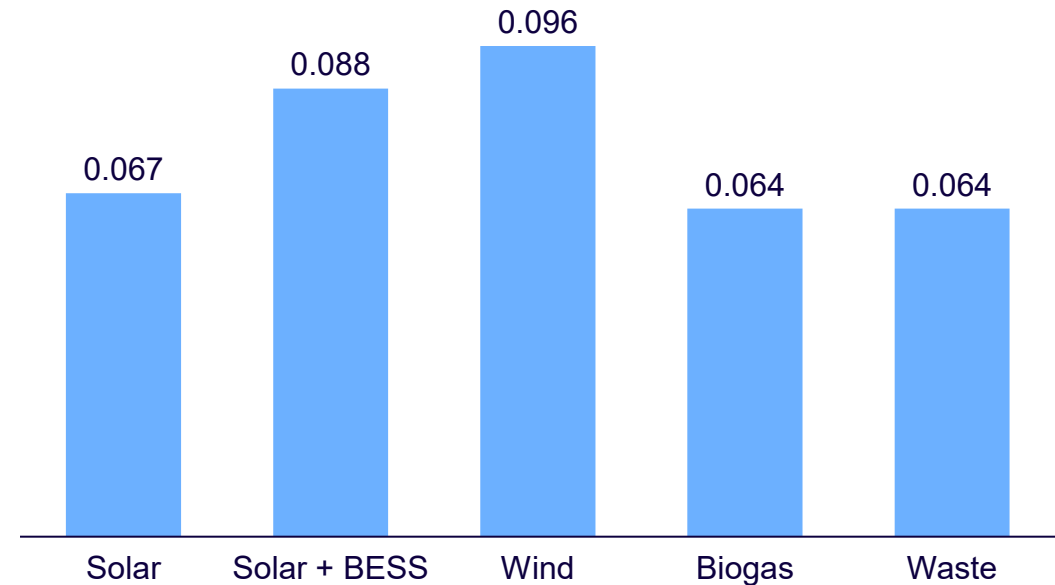
Total FiT Capacity¹

Allocated FiT capacity for 2022 – 2030 scheme, in megawatt (MW)



FiT Rates²

FiT rates for 2022 – 2030 scheme, in USD per kWh



Solar leads new installs, while **elevated FiTs for wind and solar + BESS price** in their comparatively higher development and deployment costs.

Note: 1) PPAs are typically 25 years for solar / wind and 20 years for biogas 2) Adder (Southern border provinces: Yala, Pattani, Narathiwat, and 4 districts of Songkhla) are subjected to an additional +0.0155 USD / kWh for the full PPA term

Source: Energy News Center, Watson Farley & Williams, Arthur D. Little analysis

タイは再生可能エネルギー発電に対し、法人税免除や機械の輸入関税免除など共通の優遇措置を各種再エネ技術に対して提供している

NON-EXHAUSTIVE

Incentives for Renewable Energy Projects

	Incentives	Key Conditions	Incentives Group BOI Code
Garbage / Refuse-Derived Fuel (RDF)	<ul style="list-style-type: none"> 8-yr CIT exemption (without cap) Import-duty exemption on machinery 	<i>n/a</i>	A1 7.1.1
Hydrogen	<ul style="list-style-type: none"> 8-yr CIT exemption (with cap) Import-duty exemption on machinery 	<i>n/a</i>	A2 7.1.3
Solar	<ul style="list-style-type: none"> 8-yr CIT exemption (with cap) Import-duty exemption on machinery 	<ul style="list-style-type: none"> Solar projects must be ≥ 200 kW at each power distribution point 	A2 7.1.2
Wind	<ul style="list-style-type: none"> 8-yr CIT exemption (with cap) Import-duty exemption on machinery 	<i>n/a</i>	A2 7.1.2
Biomass & Biogas	<ul style="list-style-type: none"> 8-yr CIT exemption (with cap) Import-duty exemption on machinery 	<i>n/a</i>	A2 7.1.2

Similar range of incentives are broadly offered to power producers, regardless of the technology deployed for renewable energy generation

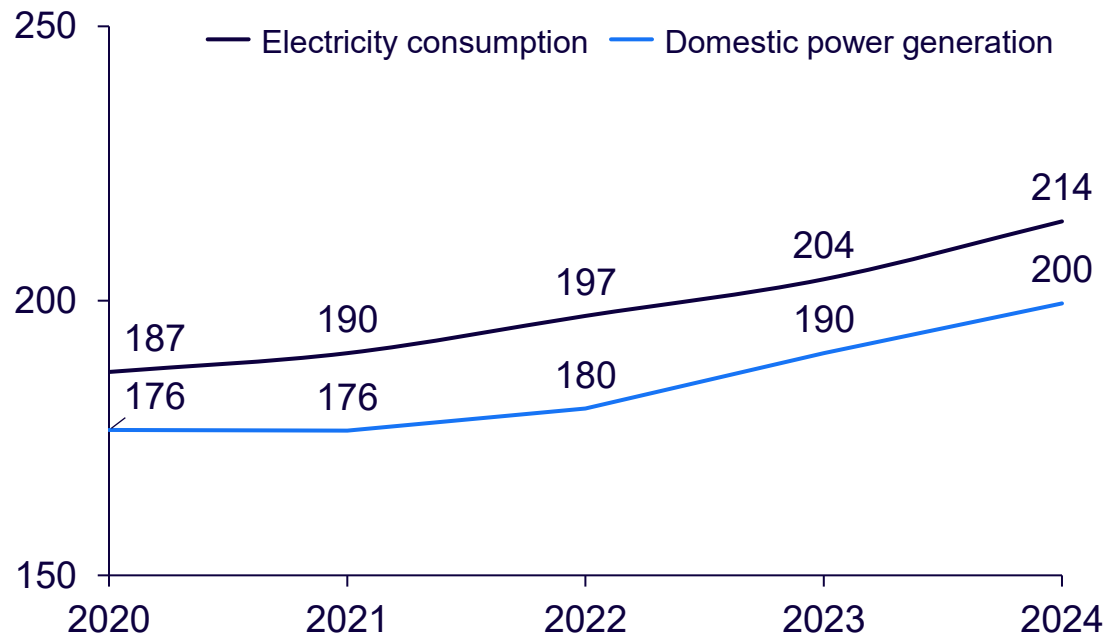
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- 10. 電力需給状況**

タイは現在電力の純輸入国であり、2020～2024年の間に電力消費が増加する一方で国内発電が追いつかず、輸入量は約5%増加している

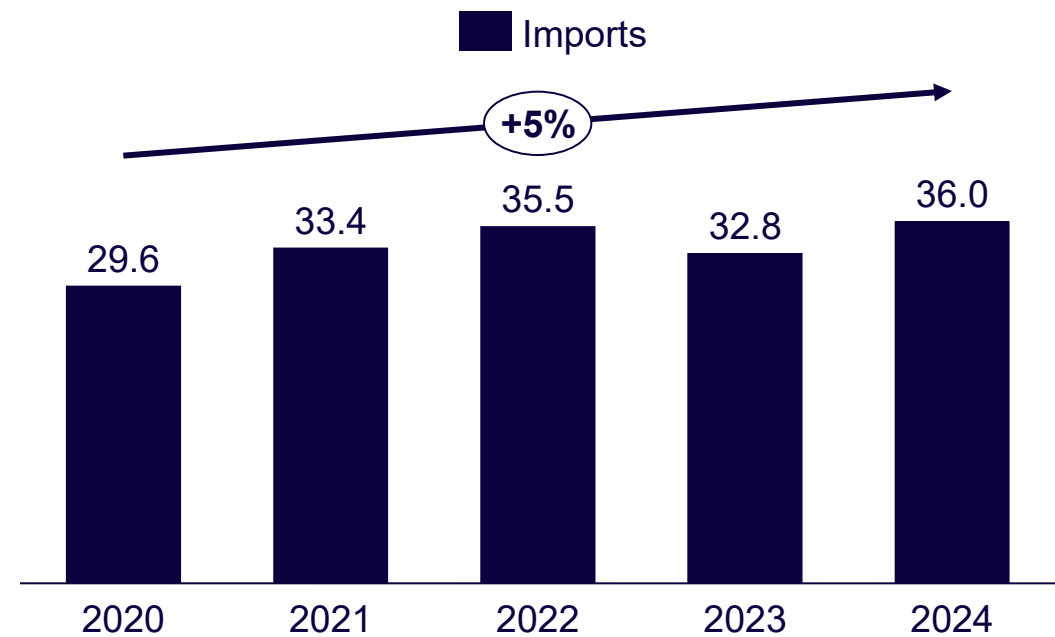
Power consumption and domestic generation

2020 to 2024, TWh¹



Power imports into Thailand

2020 to 2024, TWh¹



As a **current net importer** of power, **Thailand's dependence on imports is likely to widen** in the coming years, as consumption rises and known oil and gas reserves are progressively depleted

Note: 1) Terawatt per hour
Source: MEA, PEA, EPPO, EGAT, Arthur D. Little analysis

ARTHUR  LITTLE

THE DIFFERENCE