Identifying the **Rising Star** Industries in the Post COVID-19

Montri Mahaplerkpong

**Secretary General of The Federation of Thai Industries**

TEA webinar series on “Potentials and Outlook of Thailand’s Exhibition Industry”
19 AUGUST 2021 on 10.30 - 10.50 am
At KX Knowledge Xchange Building, Floor 11, Room X 11.5
As Importers of Machinery, Tools and Other Products, **What are Expectations from the Sellers?**

1. Identifying the "**Rising Star**" Industries Post COVID-19 to International Suppliers/Exhibitors

2. EEC the New Opportunities for International Suppliers/Exhibitors
As Importers of Machinery, Tools and Other Products, What are Expectations from the Sellers?
Import of capital goods in the first half of 2021 recovered to 16.5% from contracted at -9.3% in the previous year.

Thai Economy in the first quarter of 2021 contracted by -2.6% and the 2nd quarter GDP accelerated to 7.5%. So, 1st half of 2021, Thai economy grew at 2.0% improved from a slump at -6.9% in the 1st half of 2020.

JSCCIB forecasts the Thai's economic growth in 2021 will be decelerated by -1.5% to neutral growth at 0.0%.

Export sector in the 1st half of 2021 accelerated to 15.5% and JSCCIB expects the strong growth in export of this year.

Export growth will be expected to increase between 10.0% to 12.0% and it is the only one engine of Thailand economic growth.

Therefore, The outlook situation on capital goods can be on the recovery path as the rise of export sector that is an only one engine to gear up the Thai economic growth in this year.
## Top 5 of Suppliers of Capital Goods

### Value : Million US$

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### Growth Rate (%)

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<tr>
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<td>China</td>
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<td>8.13</td>
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<td>17.27</td>
<td>-13.39</td>
<td>-17.72</td>
<td>-50.44</td>
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### Share (%)

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<td>100.00</td>
<td>100.00</td>
<td>100.00</td>
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<td>China</td>
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<td>Japan</td>
<td>15.79</td>
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<td>14.05</td>
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<td>Europe (28)</td>
<td>9.32</td>
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<td>8.83</td>
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<tr>
<td>ASEAN (9)</td>
<td>18.81</td>
<td>18.57</td>
<td>18.23</td>
<td>18.98</td>
<td>19.00</td>
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<tr>
<td>Others</td>
<td>28.23</td>
<td>31.01</td>
<td>32.45</td>
<td>29.53</td>
<td>27.85</td>
<td>27.63</td>
</tr>
</tbody>
</table>

Source: Ministry of Commerce
What are Expectations from the Sellers? (1/4)

China

• ASEAN-China Free Trade Agreement: ACFTA, China diversifies investment to ASEAN
• Trade War
• Regional Comprehensive Economic Partnership: RCEP boost investment in Thailand especially in new innovation and technology and industries related to advance and high-value industries and New S-Curve
• Hong Kong Trade Development Council: Hong Kong investor tend to invest more in Thailand

Concern Issues:

• NTMs and NTBs
• Used capital goods from any countries will not be often a privileges from BOI
• The standard of capital goods between Thailand and China should be clarify
  ○ Short term: China should applicable standards to comply with Thai’s standard.
  ○ Long term: Both countries should have back-to-back Certificate of Origin (CO)
• Supply Chain Disruption, especially in
  - Mask
  - Personal Protective Equipment (PPE)

What should we do? If supply chain disruption has taken place, should we focus on local / regional economy?
What are Expectations from the Sellers? (2/4)

Japan

- JTEPA is utilized almost 100%
- Comprehensive and Progressive Agreement of Trans-Pacific Partnership: CPTPP, Japan wants to expand international trade flow with Thailand.
- Regional Comprehensive Economic Partnership: RCEP, Thailand and Japan should increase trade flow under this Agreement
What are Expectations from the Sellers? (3/4)

• High potential for machinery production.
• **Thai-German Institute** is an effective training center for transferring advanced manufacturing technology to Thai industry.
• **German International Cooperation: GIZ** support Thailand by focusing on the cooperation shifted from **vocational education, rural and agriculture development** and etc.

Concern Issues
• Premium Price
• NTMs and NTBs

What should we do?
• Expediting the Free Trade Agreement (FTA) negotiation with EU
• Preparing for rising cost of **EU Carbon Border Adjustment Mechanism: CBAM** mechanism.
What are Expectations from the Sellers? (4/4)

United States

• Having Potential to produce innovative products and advanced technology

• USA's major production bases: China and Mexico

• **China divert investment to Thailand as a production base and export merchandises to the USA**

• Most of the electronics and advancing medical devices in Thailand imports from USA

• **Taking advantage of the U.S. pursuit of allies** to expedite the negotiation of a free trade agreement with the United States and the European Union
Identifying the “Rising Star” Industries Post COVID-19 to International Suppliers/Exhibitors
Critical Industry & Supply Chain

During COVID-19 Era

23 Industries that need to continuously operate
- Food Processing
- Sugar
- Palm Oil
- Machinery & Metal
- Work Agricultural
- Printing and Paper
- Packaging
- Plastics
- Thai Glass Manufacturers
- Pulp and Paper
- Aluminium
- Pharmaceuticals
- Herbal
- Medical and Health Device Manufactures
- Dietary Supplement
- Biotech
- Cosmetics
- Rubber Based
- Textile
- Garments
- Power Producer
- Renewable Energy
- Natural Gas
- Petroleum Refining
- Digital

7 Industries that may temporarily slow down production
- Automotive
- Auto Parts
- Petrochemical
- Chemical
- Electricals and Electronics Telecommunications
- Air-Conditioning and Refrigeration
- Environment Management

15 Industries that may temporarily slow down production, but it can temporarily halt production if necessary
- Thailand Iron and Steel
- Granite and Marble
- Ceramics
- Cement
- Roofing and Accessories
- Machinery Manufacturers
- Foundry
- Shipbuilding Repairing and Steel Construction
- Footwear
- Leather
- Gem And Jewelry
- Creative Craft
- Wood Processing
- Thai Panel Product
- Furniture

Source: FTI
Global Electric car registrations and market share, 2015-2020

- Battery electric vehicles (BEVs) accounted for two-thirds of new electric car registrations and two-thirds of the stock in 2020.
- About 3 million new electric cars were registered in 2020. As Europe led with 1.4 million new registrations, China followed with 1.2 million registrations and the United States registered 0.29 million new electric cars.
- Many factors contributed to increased electric car registrations in 2020.
  - Electric cars are gradually becoming more competitive in some countries on a total cost of ownership basis.
  - Several governments provided or extended fiscal incentives that buffered electric car purchases from the downturn in car markets.
- However, overall, the global market for all types of cars was significantly affected by the economic repercussions of the Covid-19 pandemic.

Source: IEA


**Automotive Industry**

"Thai Government's goal is to transform the country into Southeast Asia's EVs hub within the next decade."

**EV production targets in Thailand by segment, 2025-2035**

<table>
<thead>
<tr>
<th>Segment</th>
<th>2025</th>
<th>2030</th>
<th>2035</th>
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<td>Passenger car</td>
<td>0.225</td>
<td>2.93</td>
<td>8.62</td>
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<tr>
<td>Motorcycle</td>
<td>0.36</td>
<td>3.13</td>
<td>9.33</td>
</tr>
<tr>
<td>Bus/Truck</td>
<td>0.018</td>
<td>0.156</td>
<td>0.458</td>
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</table>

Units: Million

**EV in Thailand by segment, 2020**

**Charging stations targets in Thailand by 2030**

12,000 Fast Charge station for Motor and Pickup and Battery Swap 1,450 stations for motorcycle and delivery service car.

**Which first segment should transform to EV, How about Bio-Mass?**

- Although one-ton pickup truck is a product champion of Thailand but they are designed to carry heavy loads and often run long distances. If the electrical power is exhausted, where can pickup trucks find a charging point to recharge?

- Then, Thai Government's goal transform EVs hub within the next decade, we should focus on passenger car.

**Expected to be 100% EVs by 2035**

EV production target policy, with Zero Emission Vehicle (ZEV) making up 30% all car manufacturing by 2030 and transform to Low-carbon Society.

**Next-Generation Automotive as the S-Curve industry development plan in the EEC**

BEVs are battery electric vehicles. PHEVs are plug-in hybrid electric vehicles. FCEVs are fuel cell electric vehicles. EVs refers to all electric vehicles (BEVs + PHEVs). Source: Ministry of Energy, The National Electric Vehicle Policy Committee, and Thailand Automotive Institute.
The outlook for automobile exports in the second half of 2021 is expected to expand from the recovering economy of major trading partners in Oceania and Asia. And Japanese automakers have shifted to Thailand as a production base for export.

- Competing with other low-cost auto manufacturers such as China, Indonesia, etc.
- The shortage of semiconductor chips affecting the global automotive industry.
- FTA agreement that Thailand does not participate in, it will affect export opportunities

Japanese automakers have plans to turn Thailand into a production base to expand export market.

The government’s support for investment in EV manufacturing such as ZEV Production target by 2030, and BOI’s EVs promotion measures and etc.

The investment in Thailand of Chinese automakers is expected to gradually increase.

Source: Thailand Automotive Institute and Automotive Club, FTI
“Thailand aims to be a Food Hub in ASEAN”

Food Industry

Agricultural Zoning as follows:

Northern Economic Corridor: NEC

- Creative Economy (LANNA Culture)
- Adjusting the production system to organic agriculture
- Expanding the important organic crops, including organic coffee and tea (Chiang Rai, Chiang Rai, Lampang and Mae Hong Son), organic rice and organic jasmine rice (Chiang Rai, Phayao and Chiang Mai), as well as winter vegetables and fruits

Central-Western Economic Corridor: CWEC

- Bioeconomy
- Agro & High-Tech Industrial Base
- Heritage and Green Tourism District
- The main agricultural commodities of the central region are rice and field crops, orchids and farming such as dairy cattle, duck, chicken, and fishery

Eastern Economic Corridor: EEC

- Fruit and Herb Cities: Chanthaburi, Trat, Prachinburi, Nakhon Nayok and Sa Kaeo are the agricultural bases linked to tourism
- Agro-Tourism: Rayong, Chanthaburi, Trat are upgraded to be an agro-tourism destination
- Develop the EEC to be the most modern project in ASEAN (12 S-Curve industries)
- Connecting EEC with the formation of 10 SEZs in Tak, Sa Kaeo, Mukdahan, Trat, Songkhla, Nong Khai, Nakhon Phanom, Kanchanaburi, Narathiwat and Chiang Rai

Northeastern Economic Corridor: NEEC

- Bioeconomy
- Important agricultural and livestock products are:
  - Jasmine rice in the Thung Kula Ronghai area (Roi Et, Maha Sarakham, Yasothon, Surin and Sisaket) in the Thung Samrit area (Nakhon Ratchasima and Buriram)
  - Sugarcane and cassava distributed in all areas of the region.
  - Pon Yang Kham beef cattle (Sakon Nakhon) Nong Sung beef cattle (Mukdahan) Brangus beef cattle (Nakhon Phanom) Korat Wagyu beef cattle (Nakhon Ratchasima)
  - Winter flowers and ornamental plant (Loei)
  - Herbs, Turmeric and Plaid (Sakon Nakhon)

Southern Economic Corridor: SEC

- Western Gateways and Royal Coast & Andaman Route
- Bio-based Products
- Green, Culture, Smart & Livable Cities
- The main agricultural production activities in the southern region are rubber (Surat Thani, Songkhla and Nakhon Si Thammarat), oil palm (Surat Thani, Krabi and Chumphon), fishery and aquaculture (Songkhla, Chumphon, Surat Thani, Nakhon Si Thammarat, Ranong and Phuket)

Source: NESDC
Food Industry Sand Box

“Smart Agricultural Industry: SAI”

Source: FTI
“Global Food Trend in 2021 and Future transform to new era; manufacturers and exporters should focus on studying market trends and planning to increase the market value to meet the needs health-conscious consumers”.

Global Food Trend 2021 and Future

- Food from Insect: high in protein and extremely nutritious
- Plant-based Food/Plant-based Protein
- Halal Food
- Vegetarian Cuisine
- Organic Food
- Functional food
  - Food for elderly and patients.
  - Medical foods

Sources: Department of Business Development, Halal Institute at Prince of Songkla University, Krungthai Macro Research, Thai National Shippers’ Council (TNSC) and Food Intelligence Center.
Medical and Comprehensive Healthcare

Thailand has Master Plan on strategy for Medical and Comprehensive Healthcare
- Emphasizing on integration with related industry
- Encouraging research and development and to apply technology and innovation in medicine practice
- Building up the high-value medical industry
- To produce and develop medical personnel with high ability on technology and meet international standards in terms of personnel, product and medical service
- To extend marketing channel on the domestic and international level to link with medical tourism and other related activities. And making Thailand as center of physical and mental treatment that combine expertise in both modern medicine and Thai traditional medicine

Eastern Economic Corridor (EEC) aims to encourage and develop Medical and Comprehensive Healthcare to be the medical hub center in the region
- Supporting the Eastern Economic Corridor Special Promotional Zone for Medical hub, or so-called Thammasat University, Pattaya Campus (EECmd). The medial institutes in the area included:
  - The Center of Excellence for Research and Innovation in Medical and Healthcare
  - Chulabhorn International College of Medicine
  - Thammasat Hospital’s Pattaya center
  - Nursing Home, Senior Complex
  - The Digital innovation center


TRADE IN MEDICAL GOODS IN THE CONTEXT OF TACKLING COVID-19: DEVELOPMENTS IN 2020 (30 June 2021)
Generic Drugs

✓ Government Pharmaceutical Organization, Mistry of Public Health is a generic drug manufacturer, and provide support for the production of domestic raw material to reduce dependency on import.
✓ Encouraging and pushing Petrochemical and Chemical industry club to be able to produce the reactants in the next phase.

Original Drugs

✓ Established a prototype drug development fund, and managed by private sector.
✓ To create opportunities for local entrepreneurs who able to produce drug domestically and sell for government hospital, with the patent.

Ethanol (Alcohol)

✓ Liberalizing the Ethanol Alcohol and standardizing Ethanol as Energy, Industry, Pharmaceutical, Food
✓ Changing the distribution channel that is not only rely on government organization, and promoting Thailand as Ethanol Hub of ASEAN.

ASEAN GMP

✓ Cooperate with ASEAN countries to set up ASEAN GMP as one common standard
This will support Medicine industry and Pharmaceutical industry to expand into regional market.

Cosmeceutical

✓ Enhancing Cosmetics industry to become medical cosmetic industry
To be a supporting industry to the the pharmaceutical industry and the pharmaceutical industry in the production of related products.

To establish Medical Park as a pathway to Medical Innopolis

Source: The National Defence College, SML 1
Electrical and Electronics Industry

Finished Product

Computer equipment and components
Supporting the “New Normal”, increasing works at home, and more online learning. Main export markets including Hong Kong, China, the Netherlands and Singapore.

Air conditioner equipment and components
As consumers increasingly shift their lifestyles to working from home and studying online coupled with the hot weather, global demands are increasing, with the main export markets such as the US, Vietnam and Australia.

Integrated Circuit (IC)
Circuit boards are important parts of computers, PCs, notebooks, tablets and smartphones, as well as cars. As the development of electronic devices to support 5G technology increases the demand for electronic devices and components.

OEM

Hard Disk Drive (HDD)
Thailand is a production base for hard disk drives (Hard Disk Drive: HDD) and important electronic components of the world. which expands well, especially HDD with high capacity to support the demand for cloud computing and data center to manage Big data. The main export markets are the US, China and Singapore.
Vision: Shaping a dynamic digital economy, with digital-ready manpower and greater digital awareness to propel change.

**Strategy 1: Build manpower for the digital era**
- Digital Manpower: 500,000
- Digital Citizen: 30,000,000

**Strategy 2: Transform economy towards Digital Thailand**
- Digital Transformation: 25,000 Digitalized Enterprises
- Digital Industry Promotion
- Digital Startup: 10x Average Valuation of Thailand Startups

**Strategy 3: Empower communities for digital future**
- Digitalized Community: 24,700
- Social Digital Innovation

**Strategy 4: Build digital innovation ecosystems**
- Smart City
- Big Data & Innovation
- Cyber Security
- Digital Industry Investment: 10%

10% Digital Density Growth
20% Digital Industry GDP Contribution
5% YoY GDP Growth
15% Increasing income-generating For the bottom 40%

"The Digital Economy is expected to contribute 25% to Thailand’s GDP by 2027”

Remark: ***Due to COVID-19 situation, Digital Economy Promotion Master Plan will be extended until 2027.***

Source: EEC
### Digital Industry

#### Digital market value by sub-industries, 2018-2019 and forecast 2020-2022

<table>
<thead>
<tr>
<th>Year</th>
<th>Software &amp; Software Service Industry</th>
<th>Hardware &amp; Smart Device Industry</th>
<th>Digital Service Industry</th>
<th>Digital Content Industry</th>
<th>Big Data Industry</th>
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<tr>
<td>2018</td>
<td>3,646</td>
<td>921</td>
<td>3,117</td>
<td>698</td>
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<td>4,428</td>
<td>9,148</td>
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#### Digital industry is core driving of country’s economy

By consideration of Digital Infrastructure Industry, it can be seen that it is expanding trend, especially **Software & Software Service Industry**. If the government is more encourages the digital industry, it will one core driving of the country’s economy in the future.

#### Opportunities for digital industries

Opportunities for digital industries and related to the digital economy, there are 3 prominent:

- **Digital Financial Services** (FinTech): Payments, Money Transfers, Lending, Insurance and Investments
- **Health Technology** (HealthTech)
- **Education Technology** (EdTech)
3 EEC the New Opportunities for International Exhibitors/Suppliers
12 Targeted Industries: New Engines of Growth

- Next-Generation Automotive
- Intelligent Electronics
- Advanced Agriculture and Biotechnology
- Food For The Future
- High-Value and Medical Tourism
- Automation and Robotics
- Aviation and Logistics
- Medical and Comprehensive Healthcare
- Biofuel and Biochemical
- Digital
- Defense
- Education and Human Resource Development

Source: Thailand Board of Investment
Investment Opportunities in the Eastern Economic Corridor (EEC)

### Infrastructure development
- High-Speed Rail Linking 3 Airports
- Map Ta Phut Industrial Port Development Phase 3 Project
- U-Tapao Rayong-Pattaya International Airport
- The Development Project of Laem Chabang Port Phase 3 (F1)
- Aircraft Maintenance Repair and Overhaul – MRO (U-Tapao)

<table>
<thead>
<tr>
<th>Project</th>
<th>Expect Completed Year</th>
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<td>High-Speed Rail Linking 3 Airports</td>
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<tr>
<td>Map Ta Phut Industrial Port Development Phase 3 Project</td>
<td>2026</td>
</tr>
<tr>
<td>U-Tapao Rayong-Pattaya International Airport</td>
<td>2025</td>
</tr>
<tr>
<td>The Development Project of Laem Chabang Port Phase 3 (F1)</td>
<td>2025</td>
</tr>
<tr>
<td>Aircraft Maintenance Repair and Overhaul – MRO (U-Tapao)</td>
<td>During approval process</td>
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### Eastern Economic Corridor of Innovation (EECi)
- Biotech Innovative City (BIOPOLIS)
- Automation and IoT City (ARIPOLIS)
- Aviation and Space City (SPACE INNOPOLIS)
- Food Innovative City (FOOD INNOPOLIS)

<table>
<thead>
<tr>
<th>Project</th>
<th>Expect Completed Year</th>
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<td>Biotech Innovative City (BIOPOLIS)</td>
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<tr>
<td>Automation and IoT City (ARIPOLIS)</td>
<td>2021-2025</td>
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<tr>
<td>Aviation and Space City (SPACE INNOPOLIS)</td>
<td>Project initial approval</td>
</tr>
<tr>
<td>Food Innovative City (FOOD INNOPOLIS)</td>
<td>Project initial approval</td>
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### Digital Park Thailand (EECd)
- Intelligent Operation Center
- Digital Startup Knowledge Exchange Center
- Digital Innovation Center
- Digital Edutainment Complex
- Digital Go Global Center

<table>
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<tr>
<th>Project</th>
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<td>Intelligent Operation Center</td>
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<td>Digital Startup Knowledge Exchange Center</td>
<td>2021 ?</td>
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<tr>
<td>Digital Innovation Center</td>
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<tr>
<td>Digital Edutainment Complex</td>
<td>Project initial approval</td>
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<tr>
<td>Digital Go Global Center</td>
<td>Project initial approval</td>
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</tbody>
</table>

Source: Eastern Economic Corridor Office of Thailand., EEC progress (October 2020 – March 2021)
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