

Thailand - Transport and Logistics: Infrastructure development to drive growth (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Thailand's road infrastructure stood at 516,023.0km in 2017, the sixth longest network in the Asia-Pacific region and 10th globally. The four major national highways that connect Bangkok and the rest of the country include Highway No. 1 (north), Highway No. 2 (northeast), Highway No. 3 (central), and Highway No. 4 (south). The State Railway of Thailand operates a 5,327km network with the four main routes including Bangkok-north to Chiang Mai; northeast to Nongkhai and Ubon Rajathani; east to Prachinburi; and south to the Thai-Malaysian border. Thailand's coastline is 3,219km long with over 4,000km of waterways and eight international deep-sea ports: Bangkok, Laem Chabang, Songkhla, Sattahip, Map Ta Phut, Ranong, Phuket, and Si Racha. It also has four private ports permitted to handle container cargo. Bangkok Port is one of the largest in Thailand, handling 1.5 million TEU annually. Such broad infrastructure supports the growth of the logistics industry.

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Key highlights

Robust demand to drive fleet growth

The size of Thailand's aircraft fleet recorded a CAGR of 24.3%, rising from 100 in 2012 to 297 in 2017 and is anticipated to post a CAGR of 10.6%, from 335 in 2018 to 501 in 2022 due to the addition of new routes.

Improving business environment to drive Thai road vehicle fleet size

The size of Thailand's road fleet recorded a CAGR of 7.2%, rising from 12.7 million vehicles in 2012 to 18.1 million in 2017, and is anticipated to post a CAGR of 7.4%, from 19.4 million in 2018 to 25.8 million in 2022. This will primarily be due to the growth of light commercial vehicle sales due to a sound business environment. Heavy duty truck sales will also grow owing to robust infrastructure pipelines.

Rise in the fleet of oil tankers to drive ocean fleet size growth

The size of Thailand's ocean going fleet recorded a CAGR of 0.9%, rising from 746 vessels in 2012 to 781 in 2017, and is anticipated to post a CAGR of 1.4%, from 792 in 2018 to 838 in 2022. This is primarily due to a rise in the purchase of oil tankers, which accounted for 30.7% of the total ocean fleet size in 2017, from 211 units in 2012 to 240 in 2017.

SCOPE

Risk & Reward Index: The risk & reward index compares the position of Thailand's transport and logistics industry with other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View: Key transport and logistics industry statistics include freight traffic, freight volume, fleet size, passengers, import and export gross value added, FDI and trends driving market performance.

Industry SWOT Analysis: Discover the strengths, weaknesses, opportunities and threats impacting market performance and investment in the Thailand transport and logistics market.

Industry Benchmarking: Benchmark how Thailand's transport and logistics market is performing compared to regional and global markets in terms of GVA, fleet size and freight traffic by mode.

Competitive Landscape: Overview of industry players compared with their peers across a set of indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as freight traffic, freight volume, fleet size, passengers, import and export, gross value added and FDI?

How risky is it to invest in the Thailand transport and logistics industry compared to other countries in Asia-Pacific?

What is driving the performance of key industry segments such as land, air, water and rail?

Who are the leading players in the Thailand transport and logistics industry and their presence in respective segment?

What trends are being witnessed within the Thailand transport and logistics industry?

What are the Thailand transport and logistics industry's strengths and weaknesses and what opportunities and threats does it face?

What are the recent developments and innovations in the Thailand transport and logistics industry?

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