

Wholesale & Retail Business

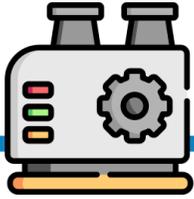


Agenda

- Thai Wholesale & Retail Business : Key indicators
- Thai Wholesale & Retail Business : SMEs Business Opportunities

Business Research
January 2024

Wholesale Trade : Industrial Machinery Equipment

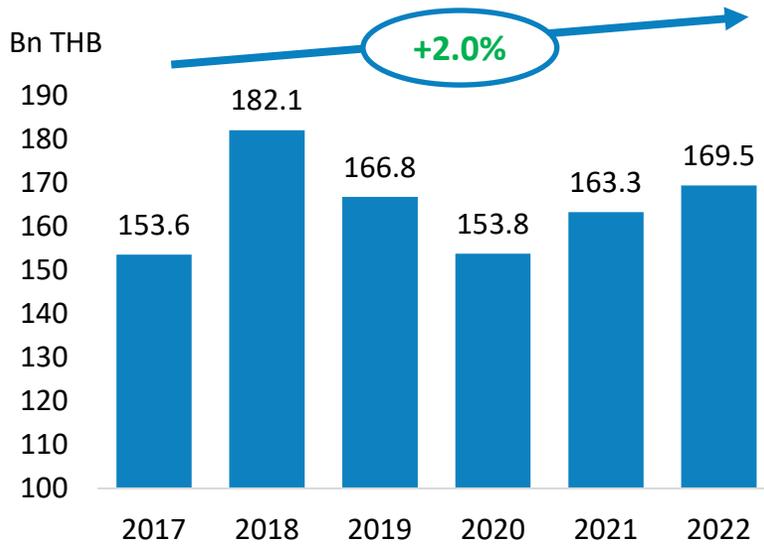


Industrial machinery equipment wholesalers are dealers and importers of machinery or equipment used in production for companies, factories and various agencies is sold in a business to business (B2B) format. Some companies provide installation and maintenance services, as well as system integration services.

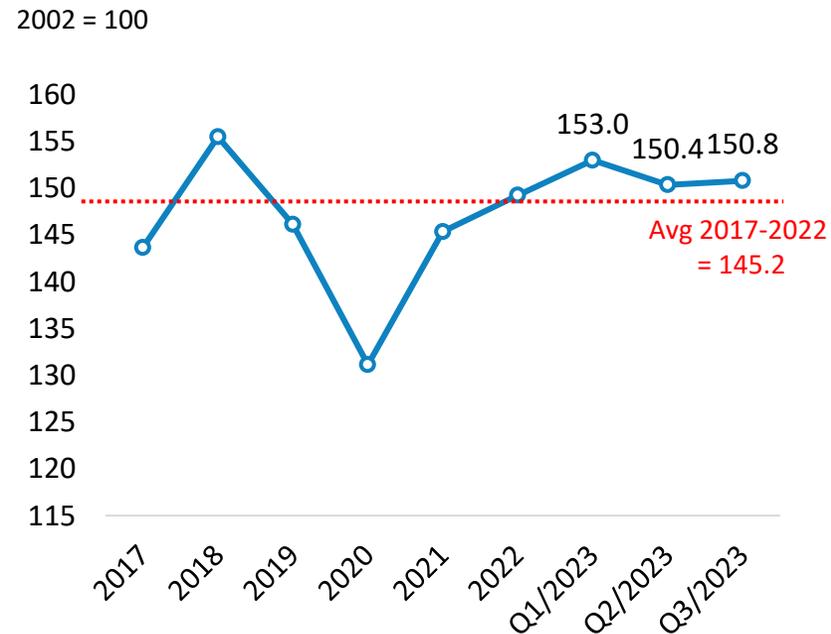
Types of Industrial Machinery:

- Machinery used to lift/transport materials
- Machinery used in construction
- Food production machinery & equipment
- Machinery and printing equipment
- Industrial machinery

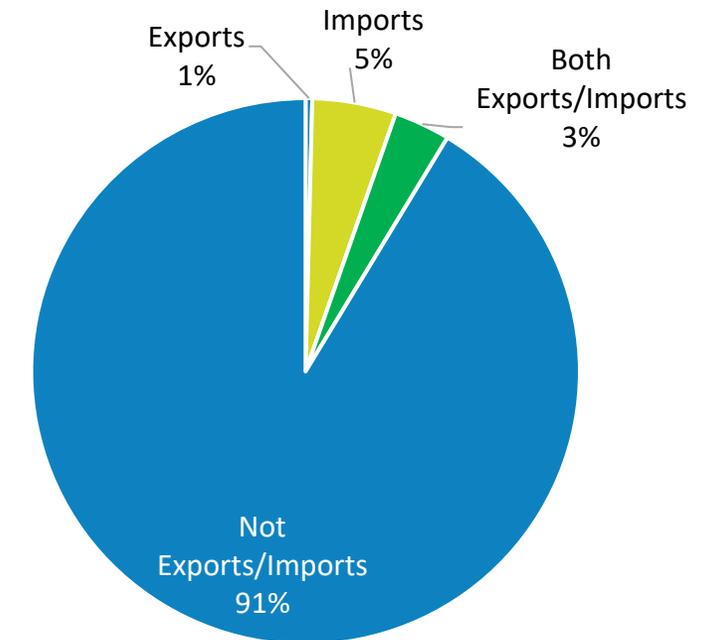
Revenue of industry (company only)



BOT's wholesales index



Import / Export Status by Firm



Wholesale Trade : Industrial Chemical & Pharmaceuticals



Industrial Chemical & Pharmaceutical Wholesale has high growth potential due to the increasing demand for chemicals and pharmaceuticals from both the industrial and medical sectors, especially in the current period of rapid development of medical technology and innovation.

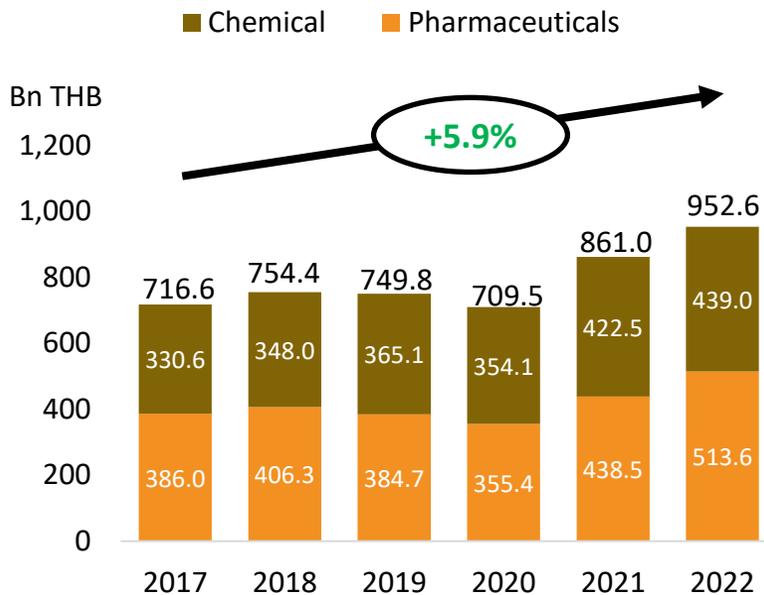
Highlights:

- Large and specific customer base
- High barrier to entry due to strict laws and regulations.

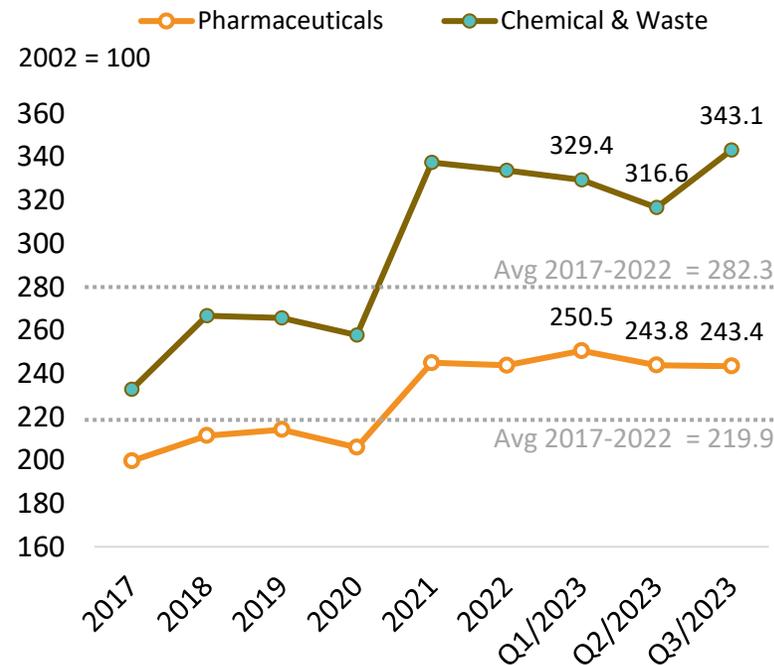
Disadvantages:

- Require high expertise and experiences.
- High risk for product safety & quality.

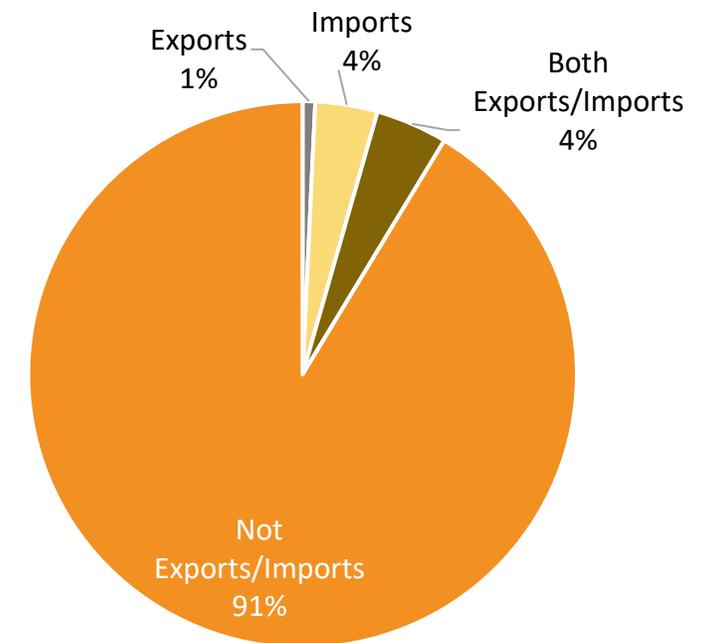
Revenue of industry (company only)



BOT's wholesales index



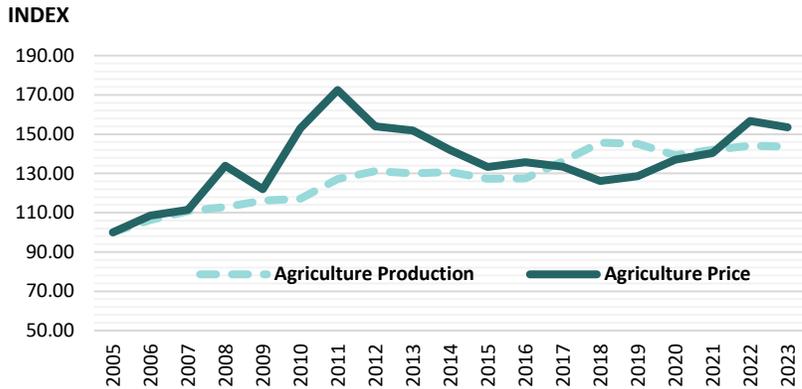
Import / Export Status by Firm



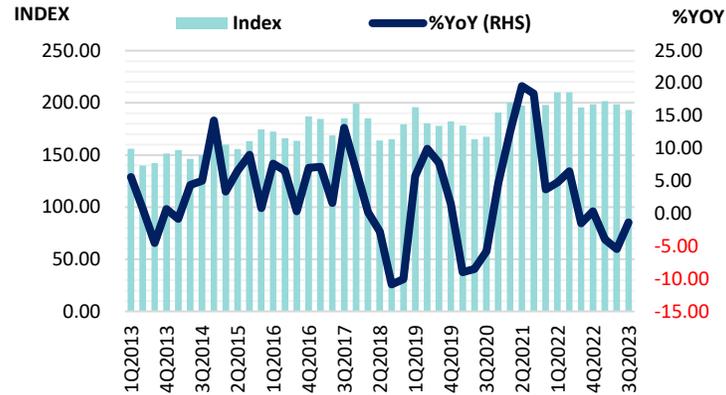
Wholesale Trade : Agricultural Raw Material and Supplies Business



Agricultural Production & Price Index



Wholesale of agricultural raw materials

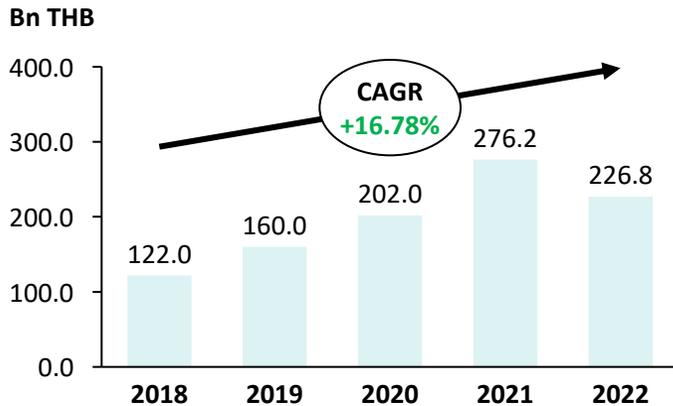


In 2024, Thailand's agricultural economy is expected to expand by 0.7-1.7% due to supporting factors such as government policy implementation, increasing demand for agricultural products in the global market, and rising prices for many agricultural products. Consequently, the wholesale business of agricultural products, including agricultural raw materials, fertilizers & agricultural chemicals and machinery, equipment & supplies is also expected to expand. However, the El Niño phenomenon may worsen and persist until at least March 2024. This poses a risk of significant reduction in agricultural yields, particularly during the dry season, affecting both the quantity and quality of crops.

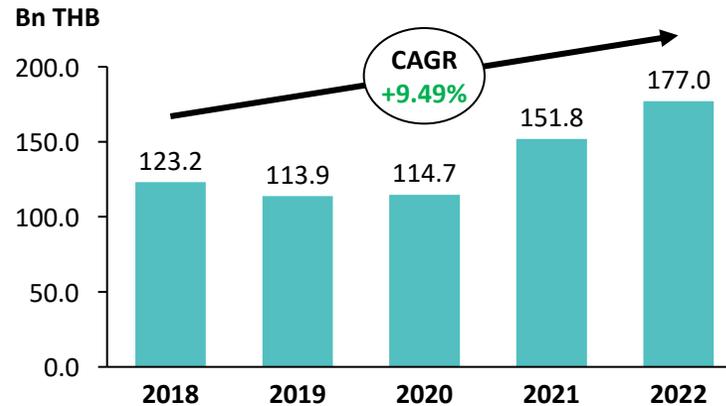
Market Size



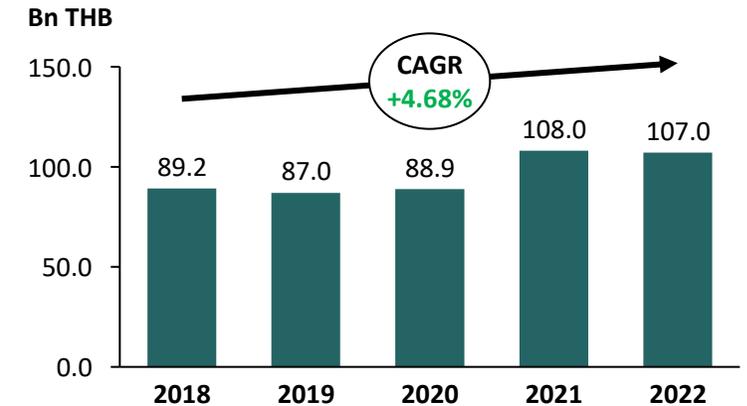
46209 Wholesale of other agricultural raw materials



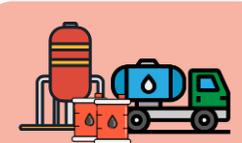
46692 Wholesale of fertilizers and agrochemical products



46530 Wholesale of agricultural machinery, equipment and supplies



Wholesale Trade : Liquid Petroleum



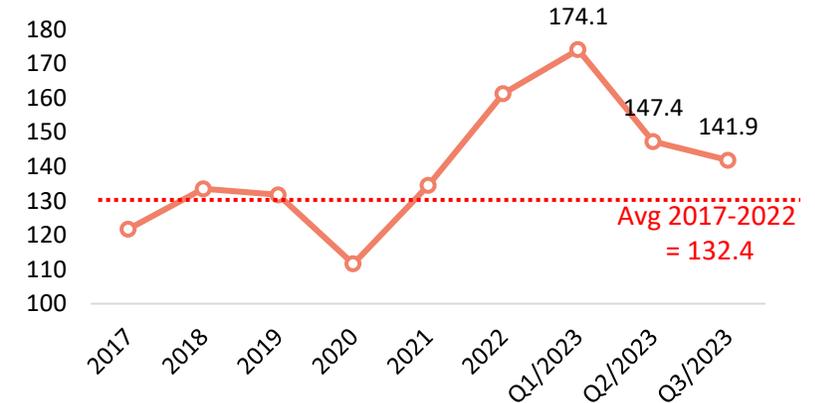
SMEs Liquid Petroleum wholesale trader also known as Oil Jobber is an intermediary between oil producers/oil depots, and gas stations. **The oil jobber business is a low-profit business** because sales are controlled by the state sector and distribution areas are determined by oil brands. However, **some oil jobber has expanded their business to transport petroleum products or operate gas stations** for gaining more margin from non-oil businesses (are renting, coffee shop, etc.)

Types of Liquid Petroleum wholesale Traders:

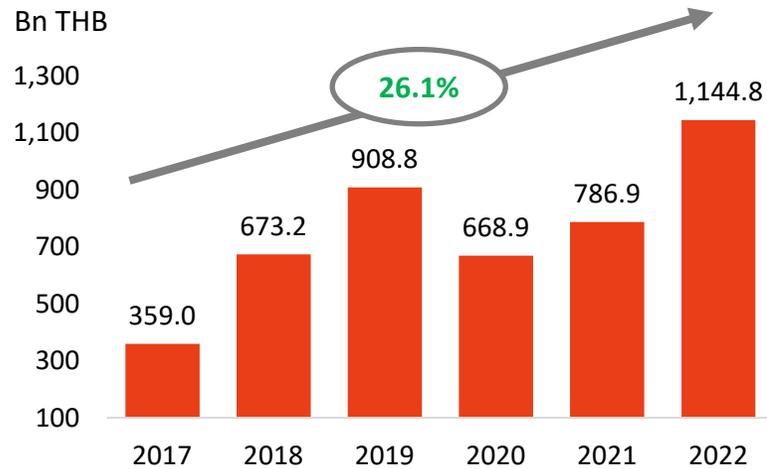
- **Oil Trader Section 7** with sales of 120 mn litres/year or large players such as PTT, Bang Chak, Thai oil, etc.
- **Oil Trader Section 10** with sales of 36+ mn litres but less than 120 mn litres. (SMEs)



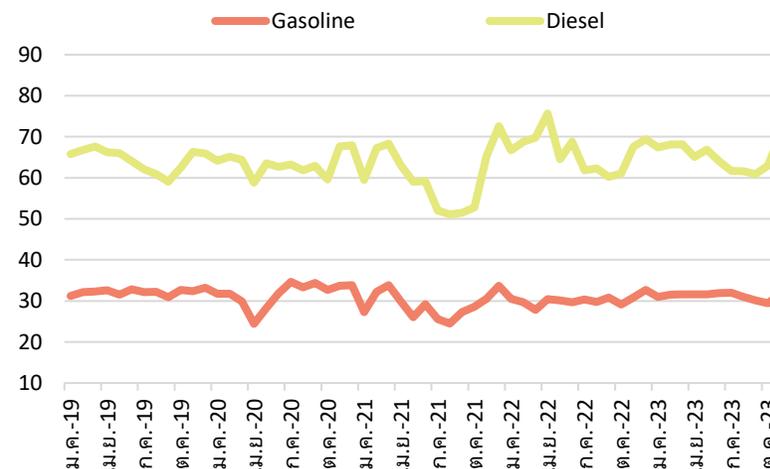
BOT Wholesale Index : Fuel



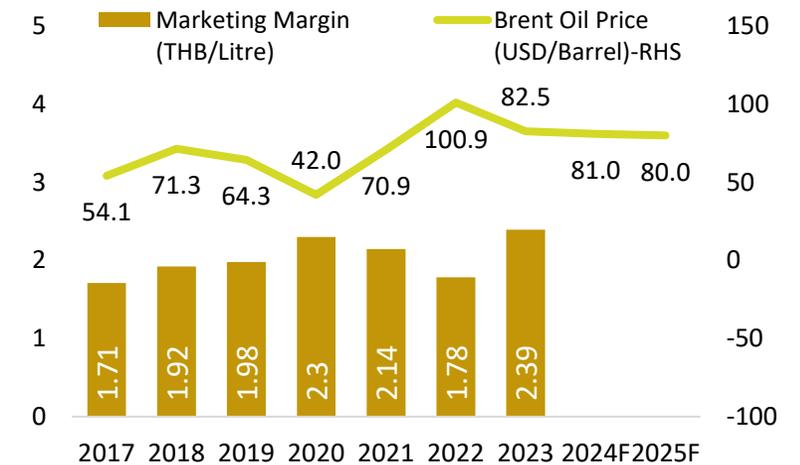
Revenue of industry (company only)



Petroleum product sales (Litre/Day)



Marketing Margin (THB/Litre)



Wholesale & Retail Business : Market Overview

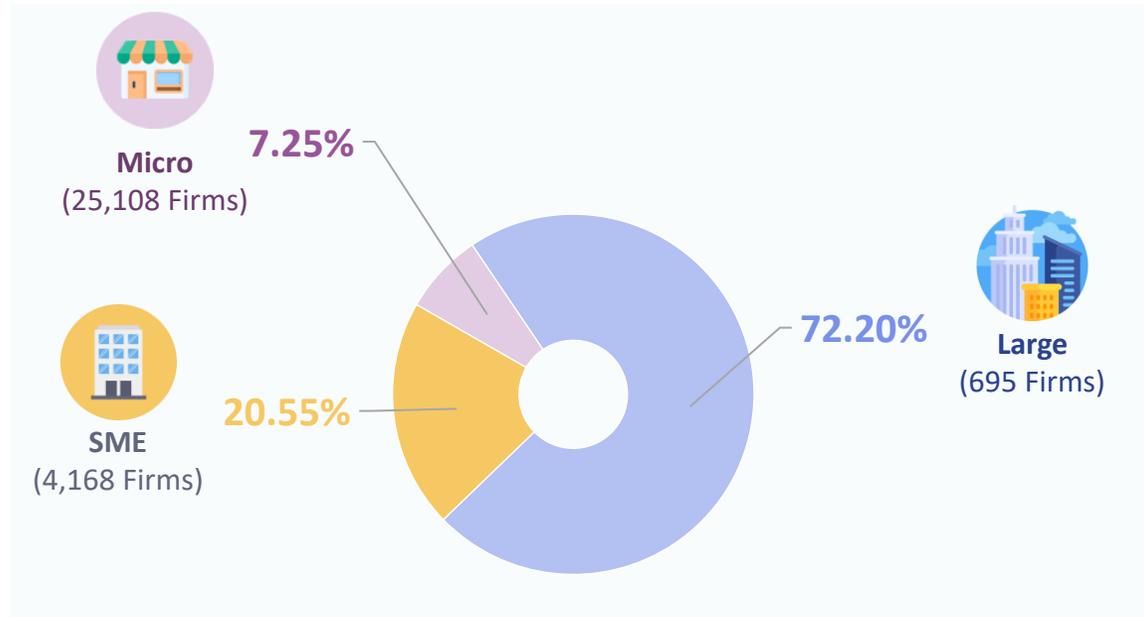
Based on selected TSIC groups (in 2022), Thailand's Wholesale & Retail Business was valued at 3,029,442.03 million baht, with large enterprises accounting for 72.20% of the market share. This is followed by SME with 20.55% and micro with 7.25%.

Share of Wholesale & Retail Business Value by firm size

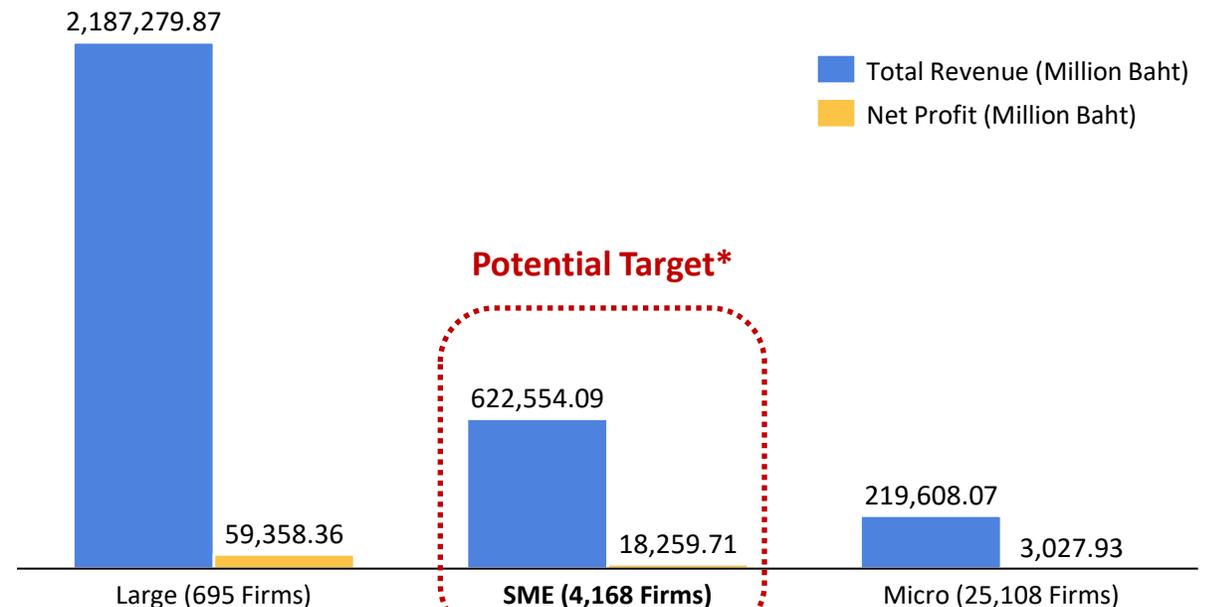
(46599, 46593, 46691, 46441, 46209, 46692, 46530, 46612)

Market Value (L, SME, Micro) = 3,029,442.03 Mn THB

Total Firms = 45,610 Firms



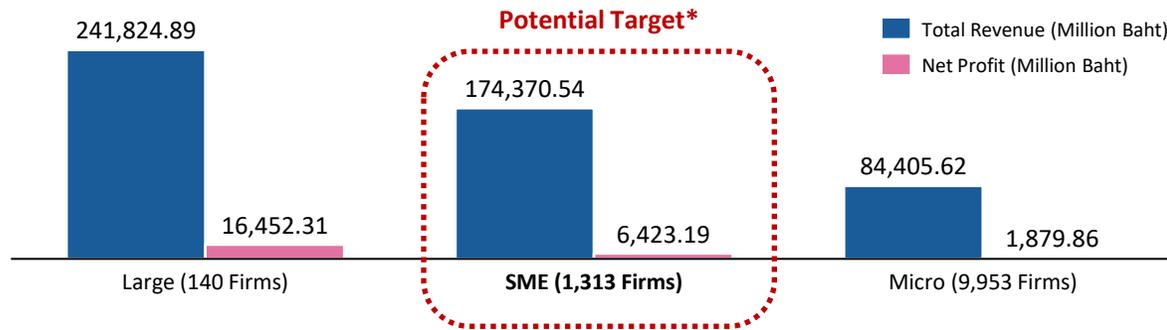
Note : No. Firm (L, SME, Micro) = 29,971 Firms No. Firm (Not Specify) = 15,639 Firms No. Total Firm = 45,610 Firms



Wholesale & Retail Business : Market Overview

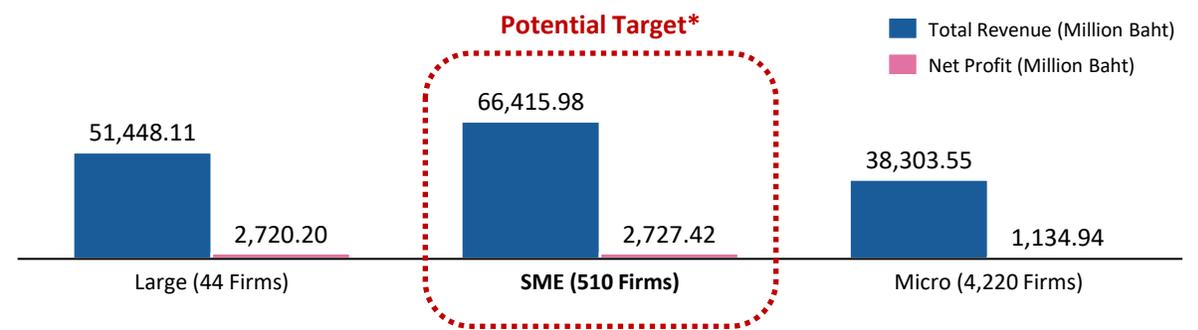
46599 : Wholesale of other machinery and equipment, not elsewhere classified

Market Value = 500,601.05 Mn THB
Total Players = 16,336 Firms



46593 : Wholesale of industrial machinery and equipment

Market Value = 156,167.64 Mn THB
Total Players = 6,629 Firms



46691 : Wholesale of industrial chemicals

Market Value = 510,159.80 Mn THB
Total Players = 4,961 Firms



46441 : Wholesale of pharmaceutical and medical goods

Market Value = 436,925.66 Mn THB
Total Players = 6,333 Firms



Wholesale & Retail Business : Market Overview

46209 : Wholesale of other agricultural raw materials

Market Value = 157,762.83 Mn THB
Total Players = 4,338 Firms



46692 : Wholesale of fertilizers and agrochemical products

Market Value = 172,149.47 Mn THB
Total Players = 3,498 Firms



46530 : Wholesale of agricultural machinery, equipment and supplies

Market Value = 106,328.06 Mn THB
Total Players = 2,211 Firms



46612 : Wholesale of liquid fuels

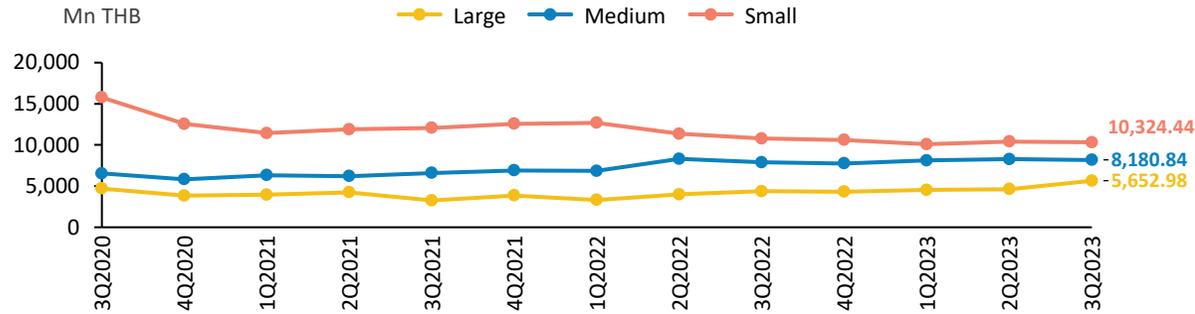
Market Value = 989,347.51 Mn THB
Total Players = 1,304 Firms



Wholesale & Retail Business : Loan Outstanding

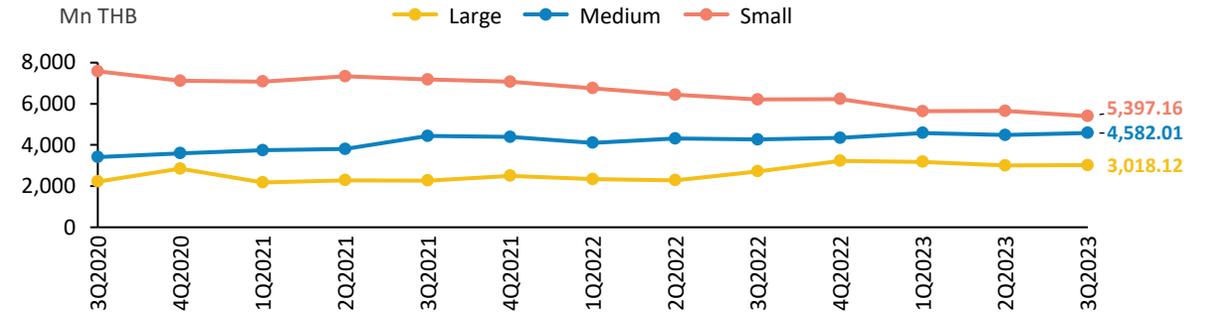
46599 : Wholesale of other machinery and equipment, not elsewhere classified

Loan Size* = 24,158.26 Mn THB



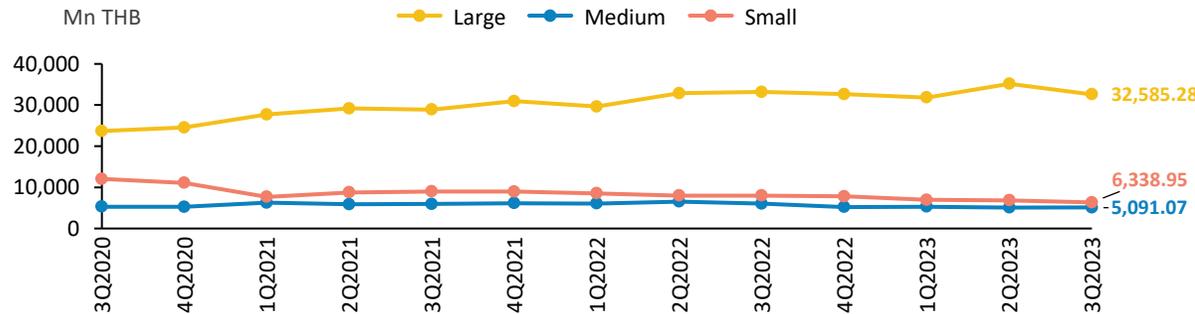
46593 : Wholesale of industrial machinery and equipment

Loan Size* = 12,997.29 Mn THB



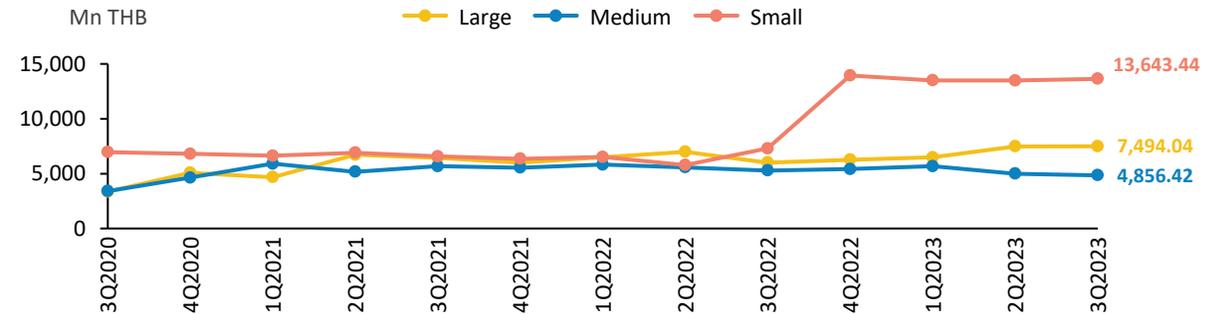
46691 : Wholesale of industrial chemicals

Loan Size* = 44,015.30 Mn THB



46441 : Wholesale of pharmaceutical and medical goods

Loan Size* = 25,993.91 Mn THB

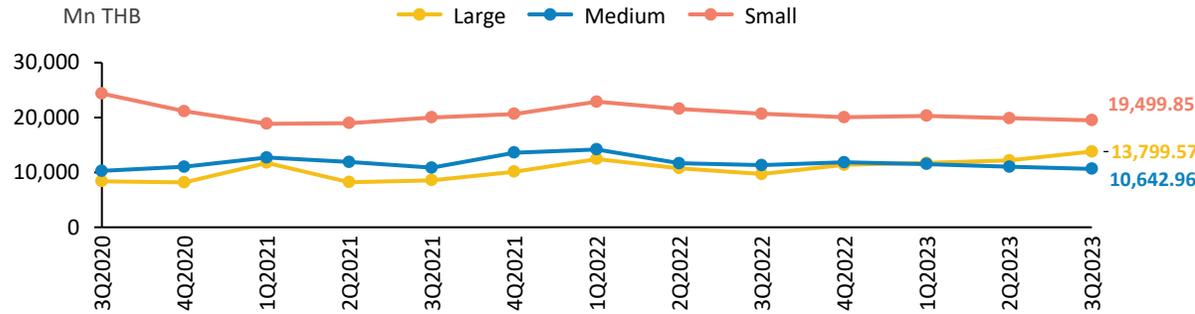


* Data as of 3Q2023

Wholesale & Retail Business : Loan Outstanding

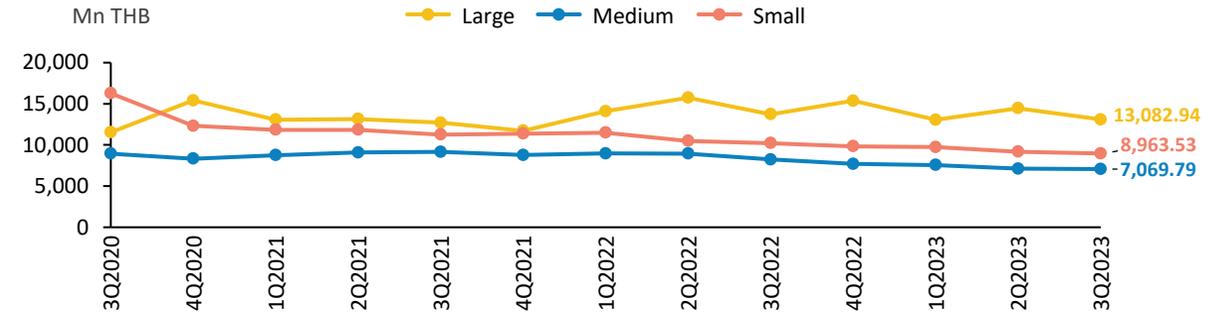
46209 : Wholesale of other agricultural raw materials

Loan Size* = 43,942.38 Mn THB



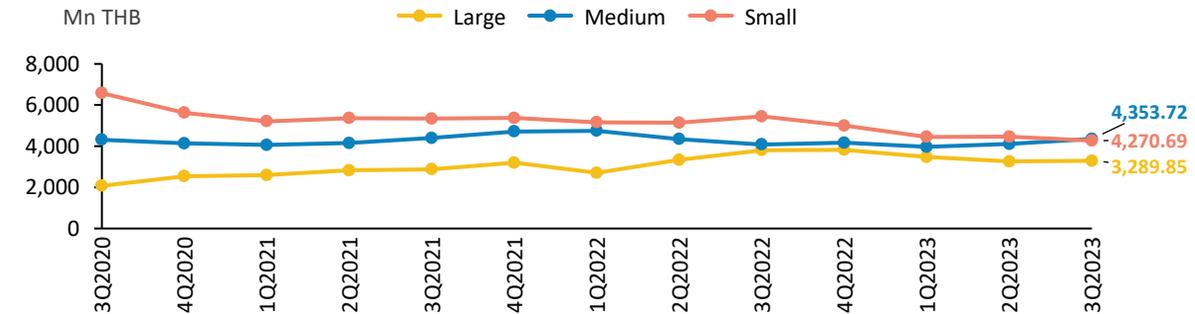
46692 : Wholesale of fertilizers and agrochemical products

Loan Size* = 29,116.26 Mn THB



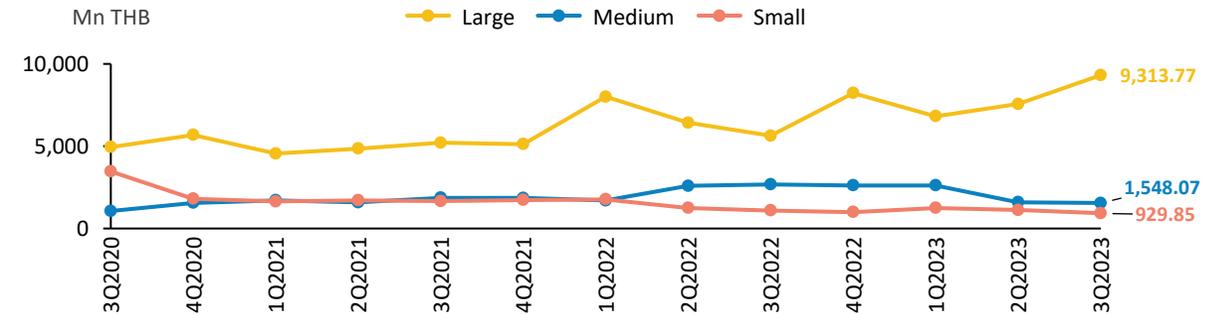
46530 : Wholesale of agricultural machinery, equipment and supplies

Loan Size* = 11,914.27 Mn THB



46612 : Wholesale of liquid fuels

Loan Size* = 11,791.69 Mn THB



* Data as of 3Q2023

End of Presentation

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