



Asian Development Bank

Thailand Resident Mission

27 May 2026



Thailand 2021 – 2025 - Prosperity and Sustainability Through Knowledge & Private - Sector - Led Growth



Competitiveness and Connectivity

Resilience and Sustainability

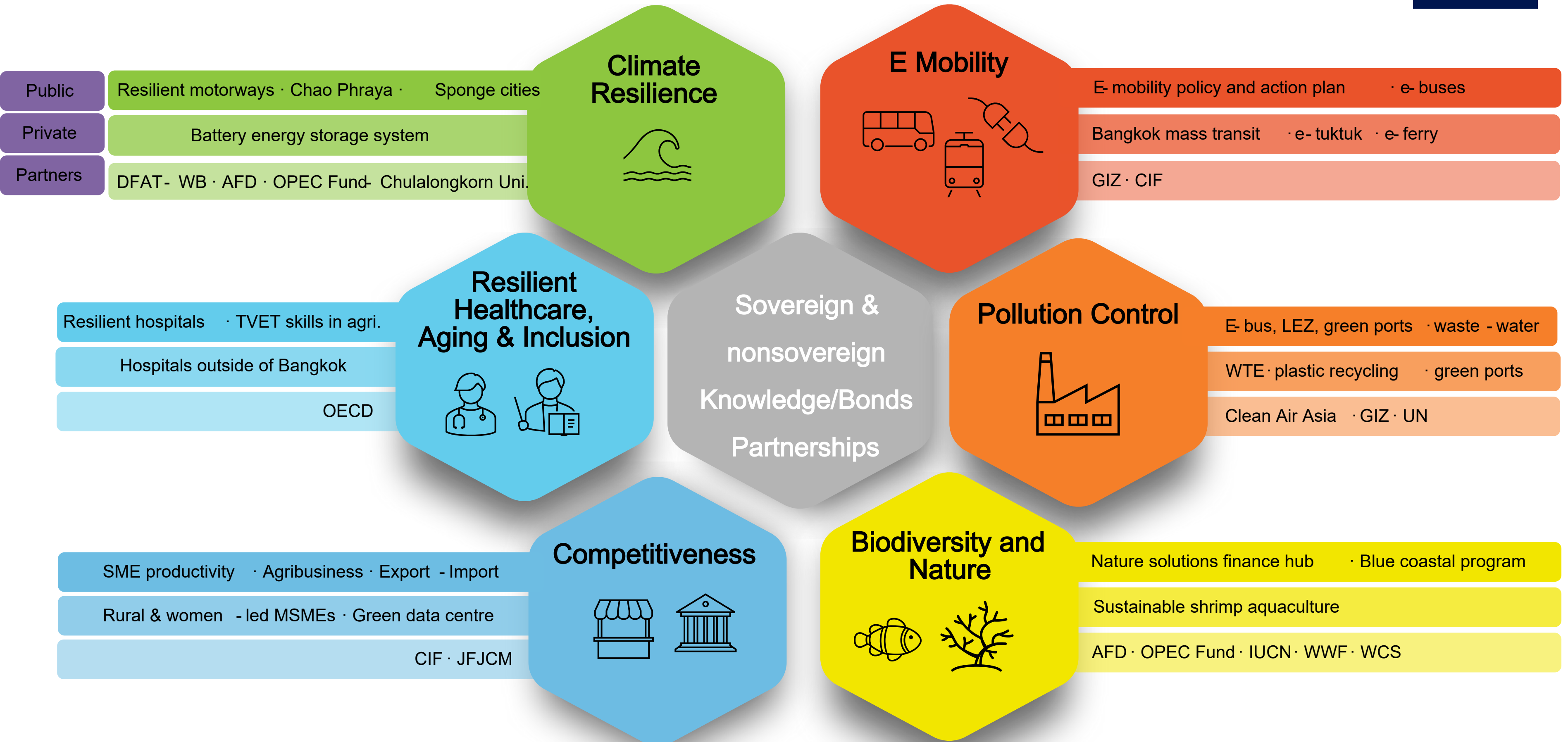
- 01** **Innovation & Productivity**
 - Digital transformation
 - Modern agriculture
 - Start -up ecosystem
 - Smart cities
- 02** **Infrastructure & Regional Links**
 - National transport connectivity
 - Regional infrastructure & knowledge exchange
- 03** **Access to Services**
 - Expanded access to public services.



- 01** **Green Transition**
 - Renewable energy & efficiency
 - Electric vehicles
 - Green & sustainable bonds
- 02** **Climate & Risk Management**
 - Adaptation & disaster risk reduction
- 03** **Regional Public Goods**
 - Healthcare systems
 - Social protection services

Cross-Cutting Priorities
 Gender Equality | Inclusion | Strong Institutions | SDGs | Regional Cooperation

ADB's Strategic Areas of Focus in Thailand and Partnerships



Thailand NSO: Scaling markets and pioneering first kind projects

- of -



Scale



Thailand has grown to be ADB's second largest NSO portfolio

- 11 projects (2021- 2025)
- \$1.5 billion portfolio
- \$1.3 bn new OCR commitments
- \$2.7 bn mobilized

Catalytic

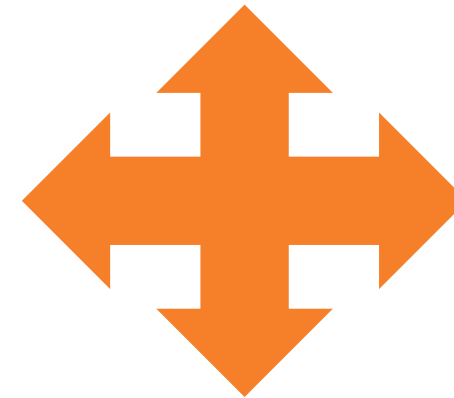


Multiple regional "firsts"

- 2013 Utility - scale solar farm
- 2014 Large - scale wind energy
 - 2017 Waste to Energy
- 2018 Green Bond for power sector
 - 2018 Mass rapid transit
- 2020 Electric Mobility/ Sustainable transportation
 - 2020 Blue loan
 - 2021 Solar Rooftop PV
- 2025 Green data center

"Replication Opportunity"

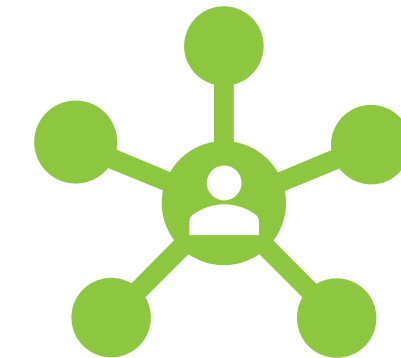
Diversifying



Expanding sectors

- Digital
- Industrial decarbonisation
- Water
- Equities and guarantees
 - Agribusiness
- Circular economy

Regional



Host to several regional finance initiatives

- Trade and supply chain finance
 - ADB Ventures
 - ADB Frontiers



Highlights Pipeline Projects

Climate Resilience



Lower East Chao Phraya Irrigation System Improvement



Photo Credit: The Nation

Impact

Provide irrigation water, reduce flood damage, protect people, farms and factories in the Chao Phraya basin

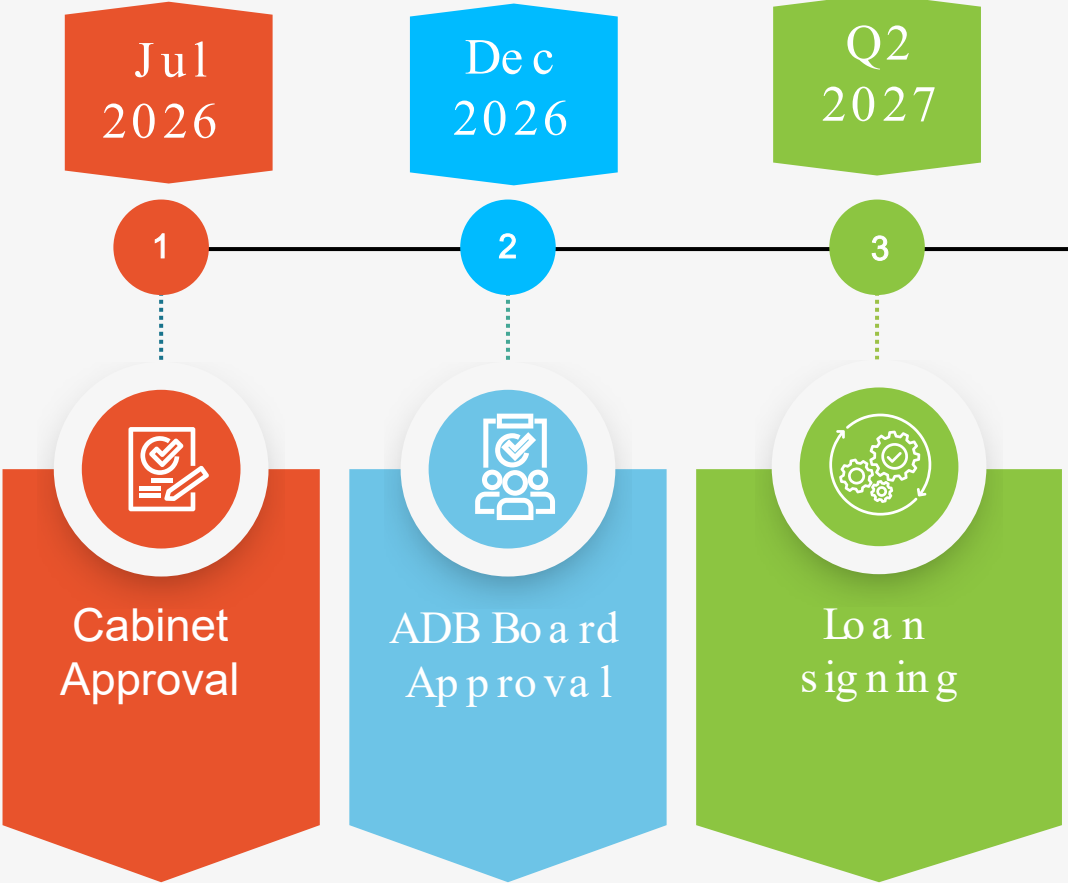
Benefits

- Prevent economics disruption and protect millions of people
- Install early - warning system for an efficient water management
- Support community livelihood and food security

Amount

1st Phase: \$2.2 B
Full masterplan: \$12.3 B

Expected Milestones

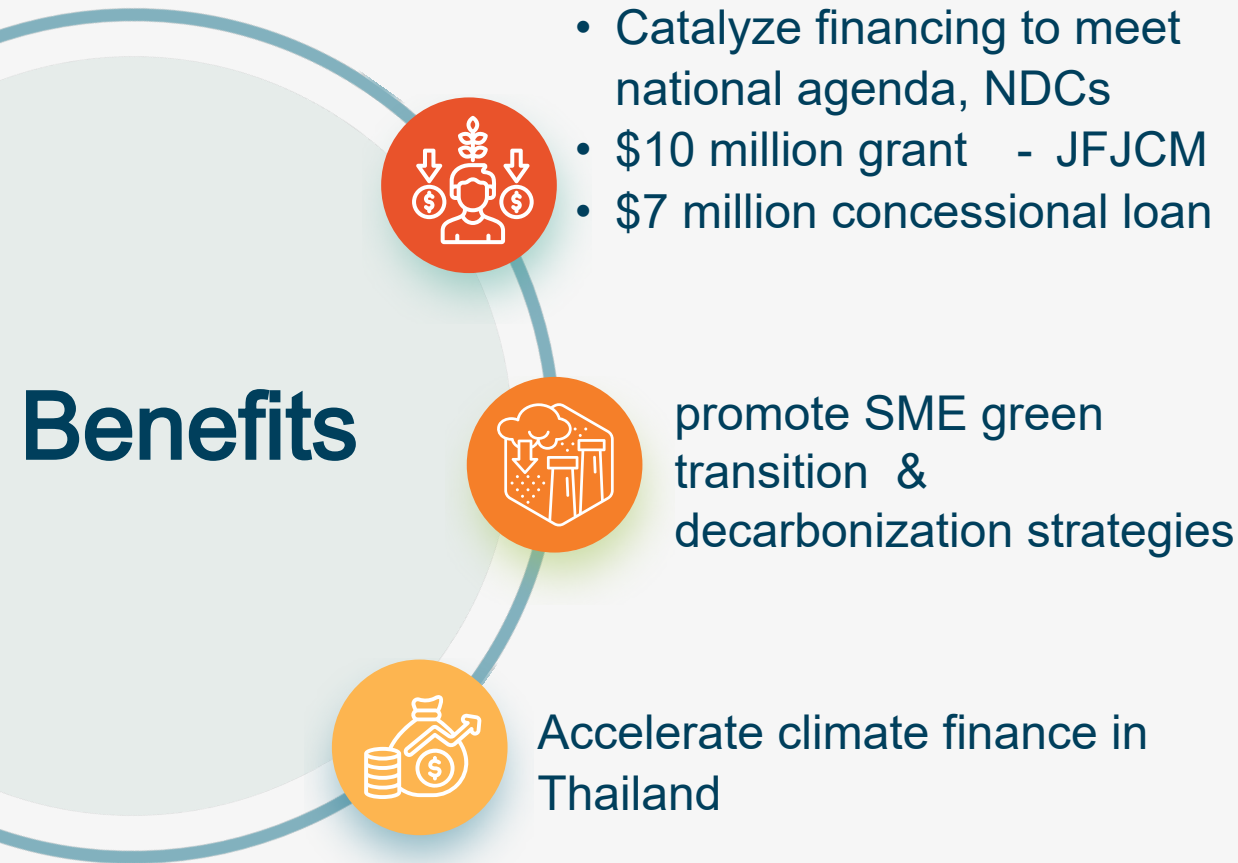


Accelerate the National Climate Change Policy & Actions Through SFIs



Impact

Partner with SFIs to deliver affordable, sustainable finance for public agencies, SMEs, agribusinesses, and hard-to-abate sectors



ADB- SFI Partnership

Flagship SFIs projects

Institution	Facility	Objective/ Focus
BAAC	Climate - Resilient Agriculture Facility	Support sustainable, inclusive agri - value chains
EXIM BANK	Green Investment Platform	Green Investment, High technology adoption, Carbon Credit

- CIF

Policy Alignment

Economic, Social, Enhanced Competitiveness, Climate Resilience, Low

- Carbon Economy

Strengthen Urban Resilience Through Advancing a Sponge City Approach



Impact

Address Thailand's 70% untreated wastewater and urban flooding issues

Benefits



Reduce flood damages by integrate nature into urban spaces effectively



Explore innovative financing options in a lignment with Thailand's Bio-Circular-Green (BCG) model



Enhance tourism by creating greener, flood-resilient, and more attractive urban spaces

Thailand, highly vulnerable to climate change (urban flooding, droughts, extreme heat), ADB propose a project to pilot in in key cities.

- finance investments in drainage,
- flood risk reduction,
- wastewater treatment

with targeted use of nature-based solutions.

Integrated measures to *reduce urban heat and improve air quality* will also be considered and included where feasible.

Phase I: has been studied for 5 cities; Bangkok, Ayutthaya, Khon Kaen, Phitsanulok, Surat Thani

Phase II: Cities to be selected for investment



Highlights Pipeline Projects

Biodiversity and Nature - Blue Economy



Blue Costal Program: Protecting National Species, Mangroves, and Coastlines



Impact

Adaptation to oceanic risks through building biodiversity in conservation, fisheries, and tourism sectors within marine and coastal ecosystems

Benefits



Effective management of priority marine ecosystem enhanced



Coastal and marine ecosystem services and productivity restored, with suggested nature-based solutions



Upscale Finance and market accelerator for coastal and marine ecosystem conservation supported

- The project is under scoping -

The overall scope has been agreed with DMCR focusing on three outputs

- i. Effective management of priority marine ecosystem enhanced
- ii. Coastal and marine ecosystem services and productivity restored
- iii. Finance and market accelerator for coastal and marine ecosystem conservation supported (Develop and implement revenue capture models and identify and structure feasible financing options)

Without immediate and scaled investment, impacts will become more costly, and harder to manage. Thailand risks economic losses, ecosystem collapse, and reduced resilience



Highlights Pipeline Projects

Pollution Control - Air Quality

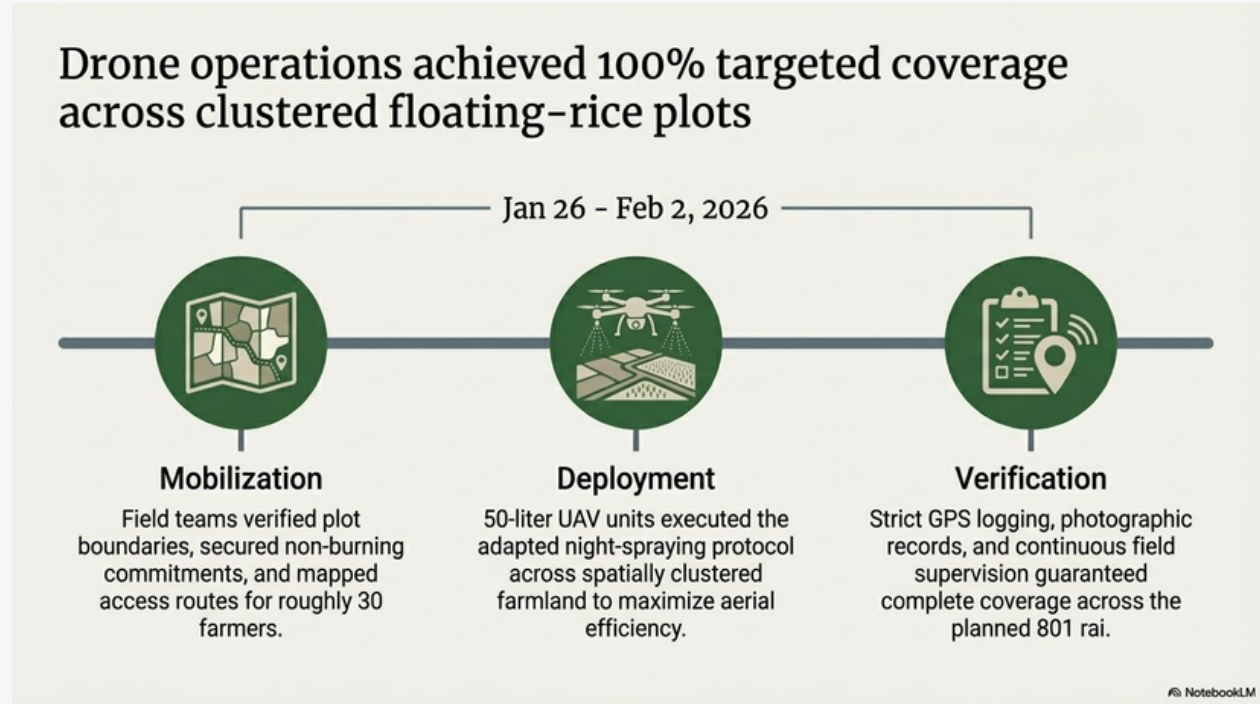


ADB- BMA Cooperation for PM2.5 Reduction in Nakhon Nayok

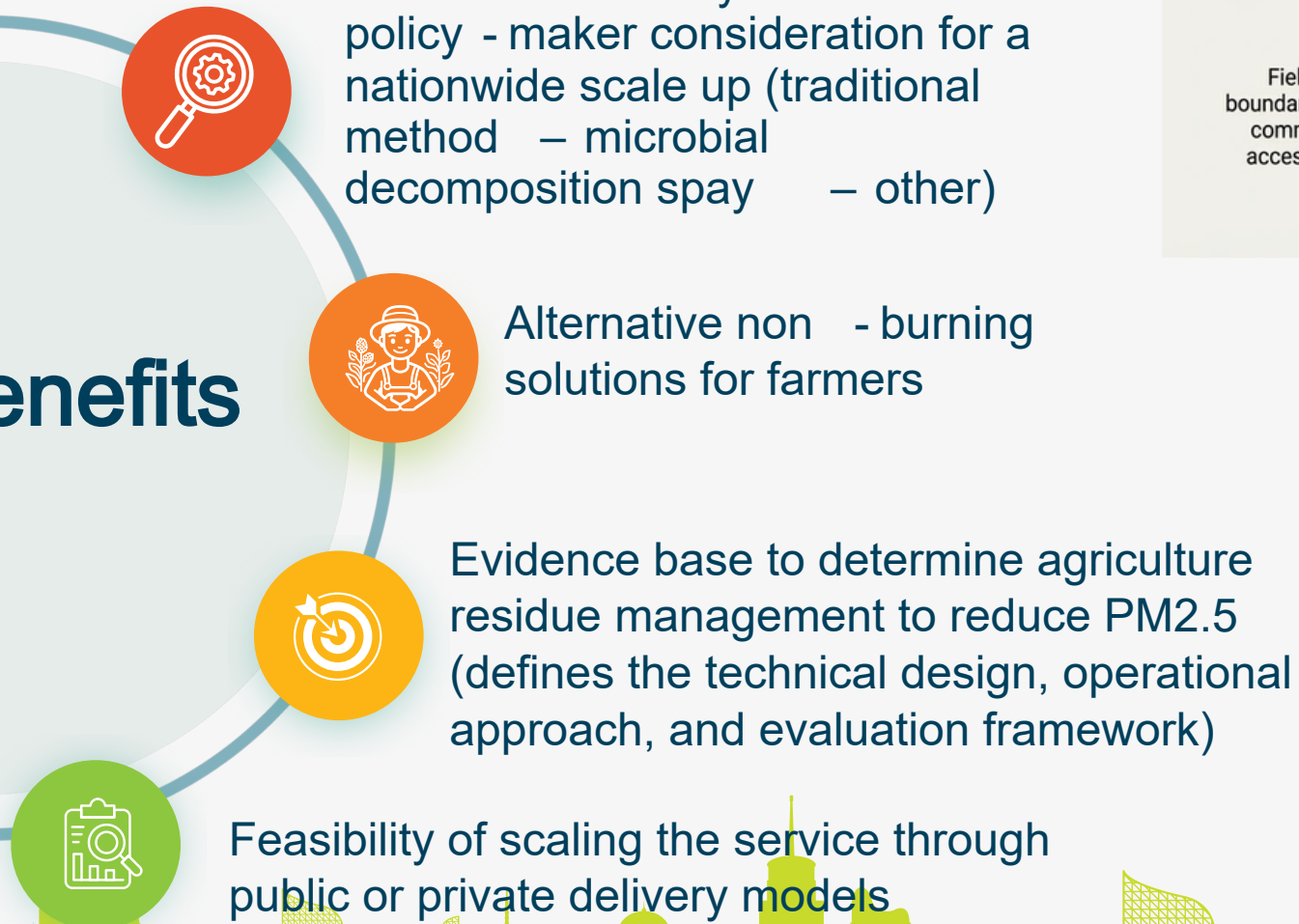


Impact

- Reduced hotspot in Nakhon Nayok
- Reduced PM2.5 in Bangkok
- Inter - province Cooperation
- Potential to scale up across the country



Benefits



Integrated Aerobic Systems for Rice Straw Management:

A PM2.5 Mitigation Solution for Nakhon Nayok's Floating Rice Areas

The pilot area:

- Pak Phli District, Nakhon Nayok Province, a core floating rice production area within the Bang Pakong River basin.
- Approximately 30 farmers will participate, covering a total area of about 800 rai (320 acres) of rice fields

Sustainable Transport Bus Electrification Project (e

- buses)



Impact

Promote cleaner and sustainable urban and intercity transport through widespread adoption of electric buses and high-quality infrastructure, such as charging stations and terminals in Thailand.

Thailand's rapid urbanization and rising vehicle ownership have increased travel demand, worsening traffic and emissions —making e - bus projects essential for improving air quality.

Benefits



Reduced GHG emissions



Improved air quality



Improved SOE financial performance

Support on EV adoption nationwide, aligning with country's target to have EV at 30% of automobile production by 2030.

ADB is providing Technical Support for upstream works for key stakeholders, including:

- i. Policy advice on E-Mobility Action Plan to scale up various types of electric vehicles;
- ii. Capacity building for policy makers on best practice of E-Mobility deployment and;
- iii. Technical and financial rapid assessment to decarbonize public transport for 2 SOEs, covering intra & intercity routes.



TA Support for initiation and implementation in Thailand

TA support :

- ❖ TA 10537 REG: Scaling up Clean Air Actions for Better Health and Resilience
- ❖ TA10486 REG: Advancing Low Emission Zones in South East Asia
- ❖ TA-10463 REG: Southeast Asia Resilient and Water Secure Cities Facility
- ❖ TA 10546-THA: Preparing Sustainable Transport Bus Electrification Project
- ❖ TA 10079 THA: Strengthening the Bio-Circular-Green Economy
- ❖ TA-10759 REG : Accelerating Deployment of Smart Energy Systems and Grid Integration Infrastructure



- ❖ Support implementation of the PM2.5 action plan
- ❖ Conduct upstream diagnostic studies to inform preparation priority investments in phase 2
- ❖ Preparation of Low Emission Zones in selected cities
- ❖ Preparation of investments in bus electrification
- ❖ Sustainability-linked bonds (zero emissions vehicles)

Sovereign lending

Non Sovereign lending

- ❖ Sustainable Transport Bus Electrification Project
- ❖ Climate Resilient Agriculture Facility
- ❖ Clean Air and Heat Initiative
- ❖ Green Ports

Ongoing ADB support

PROPOSED: Thailand Integrated Air Quality Investment Program: Phase 2 (2028 – 2030)

Sovereign lending

- ❖ Public transport infra, including regulations / plans

- ❖ Electric motorbikes
- ❖ Clean/electric buses and trucks
- ❖ Alternatives for crop residue management (including waste-to-energy)
- ❖ EV infrastructure (including charging network)
- ❖ Green ports

Non-Sovereign lending

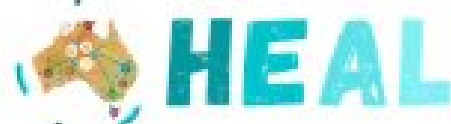
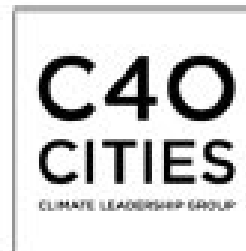
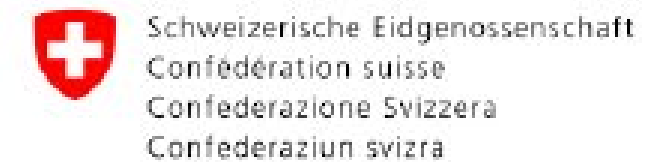
- ❖ Emerging energy technologies for industries
- ❖ Clean agribusiness
- ❖ Renewable energy and battery storage

TA support

- ❖ AQ management and monitoring in THA
- ❖ Facilitate transboundary cooperation on AQM within Mekong subregion
- ❖ Implementation of PM2.5 Action Plan
- ❖ Strengthen Ag/forests – regulations, plans
- ❖ Enforcing seasonal burning ban
- ❖ Improve fire reporting system
- ❖ Preparations for sustainable financing mechanisms

Development partners active on air quality in Thailand

- Many partners operate upstream and provide knowledge/technical assistance work, with limited involvement in the investment space
- Agriculture residue burning and transport-related emissions identified by PCD as priorities. Limited substantial initiatives for agriculture; SMEs; scope for scale up for transport.





Thank you

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