



Thailand

Market Survey Report on Agricultural Machinery

General Background

a. Area

Thailand is situated in the South East Asia at latitude from north 5°35" to north 20°30" and longitude from east 97°30" to east 105°27". It has the total land area 513,115.02 km².

b. Climate

Thailand has 3 seasons – hot (between January and April), rainy season (between May and August) and winter (between November and December). Thailand has maximum temperature 42°C in April and has minimum about 8.3°C in December. Average temperature is about 27.1°C and annual precipitation is about 1500 mm.

c. Population

The total population of Thailand is about 61,278,000 and approximately 60.4% live in the rural areas and most of their earnings comes from farming.

d. Industry

Although Thailand is agricultural country but it has many industrial sections and they are developing such as car industry, metal industry, electric power, agricultural processing, textile and garment industry, construction etc.

e. Social, economic condition

Economy

Overview

Thailand's developing free-enterprise economy has recovered from the Asian financial crisis triggered by speculation against the Thai baht in 1997-98. By 2002 Thailand's standard of living had returned to the level prevailing before the financial crisis. The recovery reflected the benefit of reform measures tied to assistance by the International Monetary Fund, direct investment from Japan, the United States, Singapore, and other nations, and surging exports. During 2001-04 the economy grew at a moderate rate, but the rate of growth was slower than in the booming 1980s and the first-half of the 1990s. A long-term shift from agriculture to manufacturing and services continues, but about 39 per cent of the workforce is still employed in agriculture, forestry, and fishing, although this sector is responsible for only 10 per cent of gross domestic product (GDP). The economy is heavily dependent on exports, such as textiles and computer components, which account for 60 per cent of GDP. Between 2002 and 2005, the number of poor declined by around 2 million. In percentage terms, the poverty rate declined from 15.6 per cent in 2002 to 12 per cent in 2004 and to 9.8 per cent in 2005, according to the World Bank.

The military coup that took place on September 19, 2006, has not had a serious impact on the economy. The baht and financial markets experienced brief declines but soon stabilized when investment experts speculated that the coup would help resolve a political standoff that was hurting the economy. Thailand's bond ratings are unchanged; however, credit rating agencies have reported that they may be downgraded depending on future developments. According to investment experts, the economy is strong enough to overcome the temporary disruption caused by the coup.



Gross Domestic Product (GDP) : In 2006 Thailand's GDP was US\$ 196.6 billion, reflecting a growth rate of 4.4 per cent over 2005. Per capita GDP was US\$ 9,100 using purchasing power parity. In 2006 services constituted 45.2 per cent of GDP, followed closely by industry with a 44.9 per cent share. Agriculture accounted for the remaining 10 per cent.

Government Budget : In 2005 Thailand's Central Government budget was estimated at US\$ 35.2 billion. The budget was essentially in balance, with a small surplus of around US\$ 467 million.

Inflation : Consumer prices increased by 4.5 per cent in 2005, up from 1.8 per cent the previous year, partly as a result of global demand for crude oil.

Foreign Economic Relations : Thailand seeks expanded trade through free-trade agreements and multilateral cooperation within such organizations as the Asian Development Bank, Asia-Pacific Economic Cooperation, Association of South-east Asian Nations, and World Trade Organization. Under the auspices of the Asian Development Bank, Thailand joined the Greater Mekong Sub-region's Development Programme in 1992. Japan and the United States are Thailand's top two trading partners and sources of direct investment. Thailand grants the United States preferential treatment for investment under the Thai-US Treaty of Amity and Economic Relations of 1966. Despite close economic ties between Thailand and the United States, the relationship suffers from disputes over agricultural trade, intellectual property rights, and customs procedures. In July 2005, Thailand reached bilateral free-trade agreements with key trading partners, such as Australia, New Zealand, China, India and Bahrain. However, the trade deals were unpopular with domestic political opponents of the Thaksin Chinnawat Government (2001-06) who claimed that the agreements failed to sufficiently protect Thai interests. China is gaining importance as a trading partner and competitor for foreign direct investment and export markets, particularly in the areas of agriculture, computer hardware, and textiles.

Imports : In 2006 Thailand imported US\$ 125.9 billion of goods, including raw materials and intermediates (US\$ 51.9 billion), capital goods (US\$ 33.1 billion), fuel and lubricants (US\$ 25.4 billion), consumer goods (US\$ 9.5 billion), and consumer durables, such as electrical appliances (US\$ 6 billion). Thailand's principal import partners in 2006 were Japan (20.4 per cent), China (10.6 per cent), the United States (6.7 per cent), Malaysia (6.6 per cent), and the United Arab Emirates (4.8 per cent).

Exports : In 2005 Thailand exported US\$ 109.2 billion of goods. Most exports related to manufacturing, including machinery and mechanical appliances (US\$ 16.1 billion), electrical apparatus for circuits (US\$ 8.9 billion), integrated circuits and parts (US\$ 5.5 billion), and textiles (US\$ 5.5 billion). Thailand's principal export partners in 2005 were the United States (15.4 per cent), Japan (13.7 per cent), China (8.3 per cent), Singapore (6.8 per cent), and Hong Kong (5.6 per cent).

Trade Balance : In 2006 Thailand posted a merchandise trade surplus of US\$ 2.3 billion.

Balance of Payments : In 2005 Thailand had a negative current account balance of US\$ 3.7 billion. This deficit reflected the deterioration in the merchandise trade account, mainly because of a sharp rise in the import bill. According to an International Monetary Fund report, the current account stood at US\$ 3.7 billion in 2005.

External Debt : As of June 2006, total external debt was US\$ 57.83 billion, or about 34 per cent of gross domestic product (GDP). Foreign exchange reserves, once depleted during the financial crisis of 1997-98, increased steadily to US\$ 41 billion in 2003, US\$ 51 billion in 2004, US\$ 52 billion in 2005, and US\$ 59 billion in 2006.

Foreign Investment : In 2005 foreign direct investment was inbound US\$ 3.3 billion. The largest foreign investors were the United States, Japan, Singapore, and the European Union.

International Reserves : International reserves totaled US\$ 70.6 billion as of June 1, 2007. The international reserves were at the same level as of April 27, 2007.

Thailand started the first National Economic and Social Development Plan (NESP) in 1961. Currently the country is in the Ninth Plan (2002-2006). From the first to third plan (1961-1976), the goals for increased agricultural production were achieved by cultivated area expansion. During the fourth to fifth plan (1977-86), the agricultural policies were changed to increase agricultural production by development and use of appropriate technology, increased production per unit area, improved cropping system and livestock production.



In Sixth Plan (1987-91) the national agricultural mechanization policy was to include with the general objective of developing the agricultural sector to increase productivity. In accordance with the general objective, the activities involved were expected to achieve the following :

- (i) Farmers will have machineries for their production at low cost.
- (ii) Agricultural machineries must be good quality in terms of price and maintenance cost.
- (iii) Agricultural machineries must be appropriate for use under various conditions in the rural areas.

In the Seventh Plan (1992-96) the policy added some specific objectives such as the R&D in agricultural machineries to consider the physical characteristic of farmer, improve production quality and develop new machines suitable for farm in Thailand.

In the Eighth Plan (1997-2001), the mechanization policy is not explicitly started like in the previous two plans. The general objective of developing the agriculture sector is to improve the capacity to compete in agricultural production by promoting the replacement of human labour by agricultural machineries.

Global Imports of Agricultural Machinery into Thailand including tractors in US\$ Mil

<i>2003</i>	<i>2004</i>	<i>2005</i>
16.58	18.42	20.05

India's exports of Agricultural Machinery including tractors to Thailand in US\$ Mil

<i>2003-04</i>	<i>2004-05</i>	<i>2005-06</i>
2.43	3.64	10.16

Indo-Thai Trade (US\$ Mil) – Jan-April'07

<i>Country</i>	<i>Exports to India</i>	<i>% increase over Jan-Dec'06</i>	<i>Imports from India</i>	<i>% increase over Jan-Dec'07</i>
Thailand	756.09	61.08	628.07	42 approx.

Import Policies

Thailand's high tariff structure remains a major impediment to market access in many sectors. The country's average applied MFM tariff rate is 14.5%. The highest tariff rates apply to imports competing with locally produced goods, including agricultural products, autos and auto parts, alcoholic beverages, fabrics, paper and paperboard products, restaurant equipment and some electrical appliances. In some cases, tariffs on unfinished and intermediate products are higher than on related finished products. In the aftermath of the 1997-98 financial crisis, the Thai Government increased duties, surcharges and excise taxes on a range of luxury imports including wine, passenger cars and wool carpets etc.

Thai Government is behind its schedule in implementing its WTO and ASEAN Free Trade Area (AFTA) tariff reduction commitments and rationalizing its complicated tariff regime, which currently has 46 rates. Nonetheless, it continues to lower selected import duties in line with WTO and AFTA commitments, and, as of October 2003, had reduced tariffs on 1,108 items, mostly on raw materials and 1,391 items, but these have yet to be implemented.

Taxation

Thailand's tax administration generally is complicated and non-transparent. Excise taxes are high on some items, such as unleaded gasoline, beer, wine and distilled spirits. In March 1999, as part of an economic stimulus package, the value added tax (VAT) was temporarily reduced from 10% to 7% and the excise tax on fuel oil was reduced from 17.5% to 5%. The Thai Government has restored the VAT to 10% from 1st October'05 onwards.



Agriculture

a. Cultivated Area

Thailand is one of the world suppliers in agricultural production. Approximately 41% of the total of the country (210,377 km²) is under agriculture.

b. Crops

Rice is the most important crop of the cultivated land and as the staple food for Thai people. And Thailand has other important crops such as rubber, maize, sugarcane, cassava, oil palm etc.

c. Soil

There are several soil conditions in Thailand. Most cultivated rice soil is Alluvial soil that holds water long time. Under different physical geography in Thailand, soil can be divided in 3 types –

- Ground water soil is in Bangkok, Ayuttaya, Prathumtani, Suphanburi and Pragenburi which are important cultivated areas of the country
- Upland soil is on Lopburi, the part of Chiangmai, Lumpang, Nan, in fan terrace complex area and intermountain basin. It is dry and not wealth.
- Intermediate soil is in the part of Suphanburi up so Sukothai

d. Irrigation and Drainage System

Administratively as well as geographically, Thailand is divided into four regions viz. Northeastern, Northern, Central plain and Southern regions. Rice is grown in all regions with different rice growing environments. Approximately 75% of rice is grown in rainfed areas and only 25% is in the irrigated areas. About 11.7% of irrigated rice area is in the Central plain region, with 6.4, 5.0 and 1.4% in the Northern, Northeast and Southern region respectively. Irrigated areas and pumping irrigation areas for rice cultivation are shown below.

The major source of water is surface and ground water utilized through diesel or electric pumps. Most common irrigation methods are flooding irrigation, sprinkle irrigation and dripped irrigation.

Irrigated area and pumping irrigation area for rice cultivation

<i>Region</i>	<i>Irrigated Area (ha)</i>	<i>Pumping irrigation area for rice cultivation</i>	
		<i>Major rice (ha)</i>	<i>Second rice (ha)</i>
Northeastern	792,784	60,538	14,291
Northern	1,222,881	30,610	24,315
Central Plain	2,151,712	46,662	6,384
Southern	474,706	859	9,838
Total	4,642,083	146,402	54,757

e. Cultivation System

The average farm size declined from 4.2 to 3.71 hectare/household as per the survey conducted by the Office of Agricultural Economics between 1995 and 1999. The farmers in the Central plain region had the highest farm size, followed by farmers in the Northeast, the South and the North. Farmers in the Northeast have the highest rented holding area per farm. Thus, the problem facing each region are different. Problems of land rent mostly occur in the Central Plain. Most farmers in the Northeast have their owned land, but they face problems of poor soil conditions as high risks from climatic variations.



Average Farm Size in Thailand

<i>Year</i>	<i>Farm Size (hectare/household)</i>
1995	4.2
1996	4.0
1997	3.96
1998	3.91
1999	3.71

Two crops a year is a common practice in rice cultivation in the area under irrigation. Some area in the central plain utilized underground water can accomplish five crops in 2 years.

In the past, buffalo and cow were draft animals popularly used in cultivation system for land preparation. Nowadays, they are found very few and only in the remote rural area. Almost of cultivation system is under mechanized. Various kinds of tillage implements are used differently in land preparation depending upon crop, tilling purpose and area. For paddy field in the irrigated area, disk plow equipped to two-wheel tractor or small four-wheel tractor is generally used at present followed by rotary tiller. Moldboard plow is also used but in a declining number. For field crop, disk plow, disc harrow, spring-loaded cultivator, and rotary tiller are used commonly equipped to big tractor. There are several methods of rice planting depending upon area and labour condition. Transplanting methods is a major practice for seasonal crop. While broadcasting and direct seeding are general practices in high land or rainfed areas every methods are mostly done manually.

A survey shows that paddy was harvested by manual using sickle 57.2%, by combine harvester 35.2% and by reaper 7.6%. Threshing are mostly done by using power thresher about 88.3%. After harvest, farmers usually sell their product immediately at high moisture content. Sun drying is still a prevailing method for paddy drying. However, as an increasing number of combine harvester in a past few year, it burdens large amount of high moisture paddy to market at peak in a short period especially in the second crop. This leads to an increasing number of dryer to solve the problem.

Global Imports of Agricultural Machinery including tractors : US\$ 248.3 million during 2005.

Agricultural Machinery & Mechanisation

a. Policy

Mechanisation plays more important roles in the present Thai Agricultural production system. Therefore, Thai Government has enhanced the mechanization development plan which had first been included in the past Seventh National Economic and Development Plan (1992-1996) and also emphasis in the Eighth National Economic and Development Plan (1997-2001) and the Ninth National Economic and Development Plan (2002-2006). With the scope of the plan number of programmes and activities have been launched by both public and private sector to achieve the appropriate use of farm machinery. In the paddy field, policies for agricultural machinery are –

- appropriate agricultural machinery to be generally available to farmers at reasonably low price
- agricultural machinery to be suitable for operation under varied local territory and soil conditions of rural area

Foreign Business Act

The National Legislative Assembly (NLA) has approved the draft proposed by the Government which contains the following six major changes to the Foreign Business Act :

- (i) A company in which foreign shareholders hold 50% or more of the voting rights will be defined as a foreign company;
- (ii) More business (such as insurance and non-commodity future market) will be removed and covered by specific laws;
- (iii) There will be no amnesty for persons who have violated the law against using nominees;
- (iv) The penalty for violating the law will increase to from 3 years to 5 years jail terms and fines of from Bht 100,000 to one million will increase to Bht 500,000 to 5 million;
- (v) Foreign companies operating will be given 3 instead of 2 years to revise their ownership structure and foreign companies must inform the Ministry of Commerce within one year of their foreign ownership status;
- (vi) A 17-Member Committee will be formed to rule whether a company is foreign or Thai-owned in case of dispute.



Tax Changes

In view of the economic downturn, the Finance Ministry is recommending that personal income tax and corporate taxes be reduced to cut the financial burden on employees and business. The Ministry is presently reviewing tax rates in order to find ways to increase Thailand's competitiveness. Considerations are being made to increase VAT from 7% to 10% in order to recoup the loss in revenue from tax reduction. Additional revenues can be generated from increased excise taxes on tobacco, alcohol beverage ducts and services.

b. Administrative Systems and those Activities or Services

(i) Government Organisations

The Government agencies involved in agricultural machinery and mechanization are –

- Agricultural Engineering Research Institute, Department of Agriculture is responsible for research and development on agricultural machinery and agricultural processes and providing technologies as well as technical services to Government and private agencies involves.
- Agricultural Engineering Operating Centres are responsible for providing training to farmer groups and corresponding agricultural extension officers from the Department of Agriculture.
- Farm Mechanisation Sub-Division of the Department of Agriculture Extension is undertaking about extension activities.
- Office of Agricultural Economics is responsible for collect statistic data of agriculture and agricultural economy.
- Thai Industrial Standards Institute is responsible for standardization of agricultural machinery.
- Bank of Agriculture and Agricultural Cooperatives is responsible for loan extension to agricultural cooperatives and farmers.

(ii) Specification of Agricultural Machinery commonly used.

At present agricultural machinery is widely used amongst Thai farmer. There are many companies research who research themselves and import farm machinery from overseas such as China, Japan, Korea and Europe. Farmers have tendencies to use agricultural mechanization in their works due to lack of farm labour. The list of agricultural machinery in Thailand especially for rice production is given below :

(iii) Specification of Agricultural Machinery for rice production in Thailand :

<i>Items</i>	<i>Specification</i>	<i>Country of Imports</i>
Tractor	45 hp	Japan, Europe
Power Tiller	9 – 12 hp	Japan, China, Korea as well as local manufacturers
Irrigation Pump	5 – 8 hp	Japan, China and local manufacturers
Thresher	1- 2 ton/hr	Local manufacturers
Combine Harvester	0.76 ha/hr	- do -

- (iv) Mechanisation will play very important role in the present agricultural production of Thailand. Labour shortage and necessity to reduce production cost have obviously shown off. Undoubtedly, demand for agricultural machinery will remarkably increase during next ten years. However, need of machines will differ from region



to region. Sophisticated control-intensive machines such as, harvesters, transplanters, planters and powered sprayers will be highly needed by farmers in more progressive regions such as the central plain and the lower part of the north. At the same time labour intensive machines such as, single axle two-wheel tractors, water pumps and manual operated sprayer will keep expanding in the north and northeast. However, percentage regional distribution of farm machinery is shown herebelow :

Percentage Regional Distribution of Farm Machineries

<i>Item</i>	<i>Region</i>								<i>Whole Kingdom (Total Unit)</i>
	<i>Northern</i>		<i>Northeastern</i>		<i>Central Plain</i>		<i>Southern</i>		
	<i>Unit</i>	<i>%</i>	<i>Unit</i>	<i>%</i>	<i>Unit</i>	<i>%</i>	<i>Unit</i>	<i>%</i>	
Power Tiller	818,028	47	243,321	14	413,643	23	278,376	16	1,753,368
4-wheel tractor	47,471	26	20,032	11	111,278	60	2,923	3	183,704
Irrigation pump	566,129	25	355,846	15	1,281,849	55	113,568	5	2,317,329
Engine Powered Sprayer	65,316	15	25,483	6	332,888	77	9,080	2	432,767
Hand operated sprayer	4,519,791	37	3,330,606	27	2,794,099	22	1,755,691	14	12,400,187
Thresher	7,002	9	25,745	34	40,497	53	3,142	4	76,386

(v) Presently, there are two forms of utilizing agricultural machinery as machine owner and/or machine hiring service. The ratio of machine owner to machine hiring service depends on size, type and price of machine or equipment. Most farmers own the small and inexpensive machine such, two-wheel tractor, water pump and chemical sprayer etc. For four-wheel tractor and power thresher, only 6.4% and 6% of total machines were possessed by farmers. However, there are still a number of small farmers who have small holding area or in the remote rural area. They are not only able to possess farm machinery but also hire the service because of the small production.

(vi) Conditions of operation, maintenance and repairing :

Normally most agricultural machinery owners have their machines repaired and maintained by themselves. If they are unable to do it, they will bring the unit to a local repairing or welding shop nearby their houses for repairing. Spare parts are normally available in the provincial or region dealers or agencies. However, it is quite difficult to get the spare parts especially in the remote areas. Thus, they usually modify the spare parts that are not available. In Thailand, the tractors, power tillers and paddy threshers generally last for 10 years, diesel engines 7 years, power sprayers and irrigation pump sets about 6 years each.

(vii) Presently, most of the agricultural equipment used in Thailand is produced locally such as, tractor, power tiller, disc ploughs, disk harrow, water pump, sprayer, threshing machine, reaper, combine harvester, cleaning equipment, dryer, rice milling machine and processing equipment etc. However local machines produced from small manufacturers are not standardized in quality, efficiency and durability. Some agricultural machines are imported by companies for Thai agricultural products.



Major products of local manufacturer in Thailand

<i>Machines</i>	<i>Production in units per year</i>
Two-wheel walking tractors	80,000
Large tillage implements	3,000
Small tillage implements	90,000
Threshing machines	2,000
Combine harvester	600
Sprayers with hand operated	60,000
Irrigation Pump	55,000

Important Contacts

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prabhu@mozart.inet.co.th
Website : <http://www.indiaemb.or.th>



List of some importers of Agricultural Machinery

- 1. Alfa Laval (Thailand) Ltd.**
1042, Soi Poonsin, Sukhumvit 66/1
Bangchak, Prakanong
Bangkok 10260, Thailand
Tel. : +66-2-361 2801/05
Fax : +66-2-3612310, 361 7215
Website : <http://www.alfalaval.com>
- 2. BIS Asia Equipment Industry Co., Ltd.**
137, Moo 3, Romkiao Rd.
Latkrabang, Bangkok 10520, Thailand
Tel. : +66-2-326 8600/06, 326 8058
Fax : +66-2-326 8058, 326 8057
- 3. Borneo Technical Co., Ltd.**
231/2, South Sathorn Rd., Yannawa
Sathorn, Bangkok 10120, Thailand
Tel. : +66-2-211 5013, 211 5252
Fax : +66-2-675 9543, 212 0509
- 4. Charoen Pokphand Agri-Industry Co., Ltd.**
Trok Chan Building 36, Soi Yenchtit Rd.
Tung Wat Don, Sathorn
Bangkok 10120, Thailand
Tel. : +66-2-675 8800
Fax : +66-2-675 9674
- 5. Delta Vet Co., Ltd.**
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Dindaeng, Bangkok 10320, Thailand
Tel. : +66-2-247 5247
Fax : +66-2-246 0108
E-mail : deltavet@asiaaccess.net.th
- 6. E.C.Marketing Co., Ltd.**
59/160-162, Ramindra Soi 5, Ramindra Rd.
Bangkhen, Bangkok 10220, Thailand
Tel. : +66-2-970 5743/48
Fax : +66-2-552 3333
E-mail : eclipse@ksc.th.com
- 7. Hi-Way Tractor Co., Ltd.**
2/16-17, Soi Amornpan 2 Vibhavadee-Rangsit Rd.
Talad Bangkhen, Laksi, Bangkok 10210, Thailand
Tel. : +66-2-579 3094, 501 1014/15
Fax : +66-2-561 1558, 501 2859
- 8. International Farming Equipment Ltd.**
27/20-21, Luang Rd., Pomprab
Bangkok 10100, Thailand
Tel. : +66-2-221 4115/16, 225 4052
Fax : +66-2-225 4053
E-mail : ifel@access.inet.co.th
- 7. Kentford Machinery Co., Ltd.**
344, Rama III Rd., Bangklo, Bangkorlaem
Bangkok 10120, Thailand
Tel. : +66-2-291 3181(8 lines)
Fax : +66-2-291 1047
- 8. Kongsiri Motors Co., Ltd.**
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Fax : +66-2-938 5588/89
- 9. Kow Tick Long Tractor Co., Ltd.**
332-334, Boriphath Rd., Pomprab
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Fax : +66-2-225 2424
- 10. Krung Thai Tractor Co., Ltd.**
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Tel. : +66-2-261 9999 (90 lines)
Fax : +66-2-258 8130,258 5520
E-mail : kttcomp@loxinfo.co.th
- 11. Lertsethakarn Co., Ltd.**
48/7, Tivanon Rd., Banmai, Pakkred
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Tel. : +66-2-583 6340/42, 916 8610/13
Fax : +66-2-961 8614, 584 2317
- 12. Marymex Trader (Thailand) Ltd.**
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- 13. Mitaran Industries Co., Ltd.**
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- 14. Multiple Trade Ltd. Part**
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- 15. Super Products Co., Ltd.**
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Fax : +66-2-939 6218, 513 0902
- 16. Universal Tractor Spare Parts Co., Ltd.**
45/96-100, Moo 9, Pinklao-Nakornchaisri Rd.
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(Source : EEPC Singapore Office)