



# THAILAND'S MEDICAL HUB



## THAILAND: MEDICAL HUB OF ASIA

Thailand is well-positioned to be the medical hub of Asia. With outstanding medical foundation that includes premium medical services, qualified healthcare specialists and various internationally accredited medical facilities, Thai medical services are renowned worldwide, resulting in a rapid growth in supporting industries such as pharmaceuticals, laboratory tests and clinical R&D.

The government has progressive policies in place to help the country attain the position of **“Thailand, a Hub of Wellness and Medical Services”**, within a ten year time frame. The strategic ten-year plan, which will be executed from 2016-2025, proposes to turn Thailand into a medical hub in four major areas: wellness, medical services, academics and products.

### Thailand: Medical Hub Policy

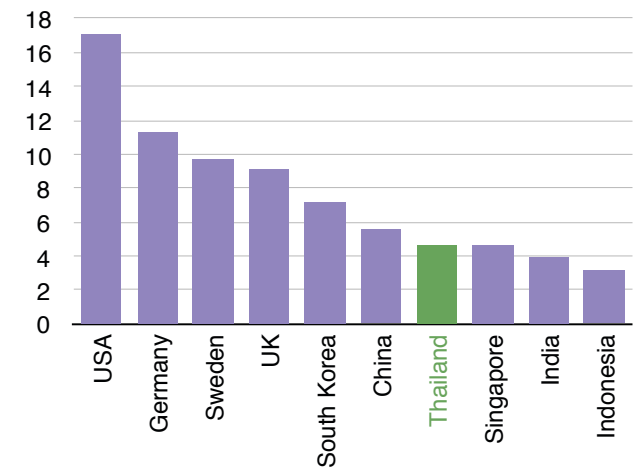
The policy aims to utilize existing human and natural resources to its highest potential and to enhance the income level of many different parties. The goal is to manifest a true improvement in the quality of life of Thai citizens. To implement this vision, the government has divided the Medical Hub Policy into four main segments.



Thailand has given the healthcare industry top priority, as seen in the government’s expenditure on healthcare. The government spends 14% of its total budget on the healthcare industry, which accounts for 4.6% of Thailand’s GDP; it is considered to be the highest among ASEAN countries

To strengthen Thailand’s position as the medical hub of Asia, the government’s support and increased demand in healthcare market have brought great opportunities for continual success in related fields including the medical services, pharmaceutical sectors and medical devices.

Thailand’s Healthcare Expenditure  
Healthcare Expenditure as  
Percentage of GDP



Source: World Bank, as of 2015





“Our 53 JCI Accredited Hospitals and 4 receiving Advanced HA are among the first to receive accreditation in Asia”

As the world leader for medical tourism, over a million international patients travel to Thailand every year on medical travel packages. The number of the foreign patients receiving treatment reached 2.35 million people in 2014 and their numbers are growing annually. With our world-class medical facilities, premium healthcare services available at highly competitive prices, and our global reputation for graceful and attentive service, it is not hard to see why we are rapidly becoming the Medical Tourism Hub of Asia.

## MEDICAL SERVICES

Leading Medical Tourism Hub of Asia

### World-class Medical Facilities

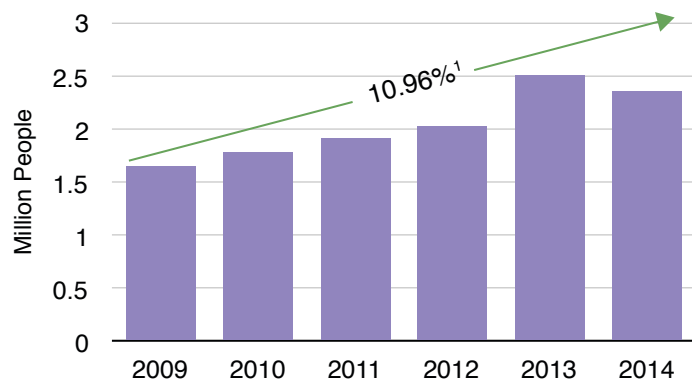
The healthcare industry is largely driven by our world-class medical facilities. We are among the first in Asia to have hospitals that have acquired the Joint Commission International (JCI) accreditation.

With more than 1,000 public and 300 private hospitals nationwide and over 50,573 well-trained physicians, we offer a **diverse range of treatments** that include:

- General examinations
- Dentistry
- Cancer treatments
- Hip replacements
- Kidney transplants
- Cardiology testing
- Heart surgeries
- Laser eye surgeries
- Cosmetic surgeries
- Weight loss surgeries
- Sex change operations
- Balloon dilatation

“1<sup>st</sup> in Top Destinations for Medical Tourism\*”

Foreign Patients to Thai Hospitals: 2008-2014



Source: Department of International Trade Promotion, Ministry of Commerce, Thailand: \*Healthydietbase, 2015

Note: ¹Compound Annual Growth Rate (2009-2014)



## PHARMACEUTICAL SECTORS

The pharmaceutical market in ASEAN is growing at an unprecedented pace. Thailand's pharmaceutical market is considered as the largest and most developed in the region, and is projected to achieve the rank of the eighth largest market in the Asia Pacific Region within this year.

Thailand's export of pharmaceutical products has grown steadily over the past five years, demonstrating a growth of 6.12%. Most of the pharmaceutical exports went to countries in the ASEAN region, such as Myanmar (17.4%), Vietnam (16.2%) and Cambodia (9.5%).

Thailand imports its pharmaceuticals from a diverse base of pharmaceutical suppliers. In 2015, the US was the largest supplier of pharmaceuticals to Thailand and accounted for 15.4% of total imports. China, Germany and Switzerland were the next largest suppliers at 10.7%, 9.3% and 6.7%, respectively. Since most

active pharmaceutical ingredients are imported from manufacturers overseas, this leaves sizable room for new pharmaceutical investors.

### Center of Excellence in Clinical Trials

Thailand is devoted to promoting the execution of clinical studies in compliance with the International Conference on Harmonisation-Good Clinical Practice (ICH-GCP) standards. With a strong determination and government support to move the country toward a world-class center of excellence for clinical trials, in combination with several organizations and research institutions supporting the development and testing of drugs and other medical technological breakthroughs, there is an evident potential for continued growth in research and development in the pharmaceutical industry in Thailand.

### Thailand's Clinical Trial Process And Components

	R&D	Prototype	Pre-Clinical	Clinical Trials	Manufacturing
Networking			FoSTAT <sup>1</sup>	TCELS <sup>2</sup>	
Financial Support	TRF <sup>3</sup>	NIA <sup>4</sup>		TCELS <sup>2</sup>	BOI <sup>6</sup>
Research		NSTDA <sup>5</sup>			
Infrastructure		Universities and Medical Schools			
Standard & Regulations		Thailand's Food and Drug Administration			
Capacity Building		Universities and Medical Schools			
IPO*		Universities			

Source: National Science Technology and Innovation Policy Office (STI)

Note: <sup>1</sup>Food Science and Technology Association of Thailand (FoSTAT); <sup>2</sup>Thailand Center of Excellence for Life Sciences (TCELS) <sup>3</sup>Thailand Reserve Fund (TRF); <sup>4</sup>National Innovation Agency (NIA), <sup>5</sup>National Science and Technology Development Agency (NSTDA), <sup>6</sup>The Board of Investment of Thailand (BOI)

Thailand has been widely accepted on its well-developed clinical trial infrastructures. A number of international

contract research organizations (CRO) see Thailand as an attractive place to conduct clinical trials, given its large target population, qualification and credentials of Thai researchers, relatively low costs, and good clinical capabilities and high standard.



### Pioneering Research in Vaccine Development

With high-caliber researchers, vaccine developers and a vast amount of agencies working in the field of vaccine research and development, Thailand is now becoming the leader of vaccine development in ASEAN. Some successfully developed projects include 5-in-1 or 'cocktail' vaccine, H5N1 avian influenza vaccine, dengue vaccine.

#### 5-in-1 or 'Cocktail' Vaccine

Many vaccines have been developed by the Thailand's NSTDA in collaboration with BIONET Asia. For instance, the 5-in-1 or 'Cocktail' vaccine against 5 major infectious diseases, diphtheria, tetanus, pertussis, hepatitis B, and meningitis has been successfully developed and is expected to be released to the market in 2017.

#### H5N1 Avian Influenza

In response to the worldwide outbreak of avian influenza in 2005 and the pandemic H1N1 in 2009, the Government Pharmaceutical Organization (GPO) has actively involved in the development of flu vaccine production capacity as part of the National Flu Pandemic

Preparedness Plan. The GPO H1N1 PLAIV vaccine approved by the Thai FDA in 2011, followed by the "FluVac" H5N2 and the IIV seasonal vaccines currently under clinical trials and an establishment of an industrial-scale influenza vaccine production plant in Saraburi province have clearly demonstrated the successful accomplishment of GPO in influenza vaccine production.

#### Dengue Vaccine

NSTDA researchers have also developed a dengue vaccine to address and prevent dengue fever, the disease of high fatality rate. The vaccine is aimed for use in indigenous population as well as populations along Thailand's border regions.

### Natural Product Research in Thailand

#### Functional Food

Thailand is one of largest emerging international markets in South and South-East Asia. We have a strong focus on promoting the food industry, developing export-oriented food products and creating innovative new

products. Recently, Thai scientists have begun investigating the subtle action of biologically active food components on human health. Additional research aims to validate the efficacy of these food components and establish appropriate dietary levels.

Thai researchers have identified functional food components that may improve memory, reduce arthritis, lessen cardiovascular disease and provide other benefits typically associated with utilizing prescription drugs. Thailand is making a great deal of progress with respect to functional foods and molecular nutrition, both novel scientific paradigms that challenge traditional nutrition approaches.

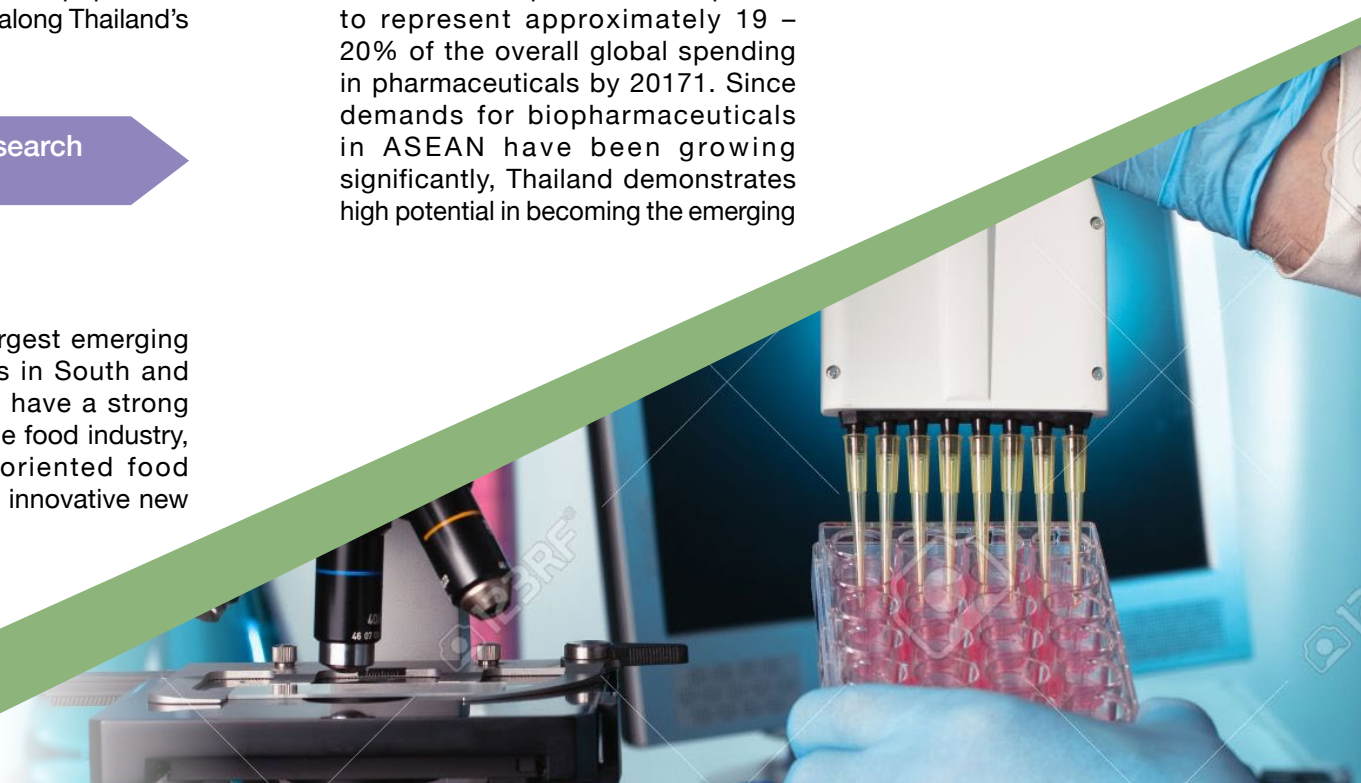
### Biopharmaceuticals See Dynamic Growth

Biopharmaceuticals market has continued to expand and is expected to represent approximately 19 – 20% of the overall global spending in pharmaceuticals by 2017. Since demands for biopharmaceuticals in ASEAN have been growing significantly, Thailand demonstrates high potential in becoming the emerging

biopharmaceuticals hub of the region. Given Thailand's capabilities in clinical trial infrastructures and abundant biopharmaceutical-related trial subjects, the country has bright prospects for growth in this fast-growing industry.

While protein-based drugs have been used to treat many diseases, drug manufacturers face many challenges producing the required proteins in large quantities. To solve this problem, the National Science and Technology Development Agency (NSTDA) has been successful with characterizing the protein-production performance of a methylotrophic strain called *Pichia thermo methanolica*, which can be used as an active ingredient in medicine. This discovery enables scientists to create ground-breaking protein-based drugs.

Great strides are being made in biopharmaceutical research in Thailand; the pre-industrial production of a recombinant human growth hormone is underway. Supported by the TCELS, the hormone is currently under trial production at the National Biopharmaceutical Facility at King Mongkut's University of Technology, Thonburi.



## National Biopharmaceutical Facility (NBF)

King Mongkut's University of Technology Thonburi (KMUTT), in collaboration with BIOTEC, established Thailand's first CMO for manufacturing of biopharmaceuticals for phase I/II clinical trials. NBF's GMP-compliant facility comprises a microbial fermentation suite, a cell culture suite (both up to 500L batch size with well segregated downstream processing areas), and an aseptic fill and finish line with lyophilization capability.

As other infrastructure projects in translational research are currently under progress in Thailand, NBF is directing its efforts into building Thailand as an R&D and manufacturing hub in the biopharmaceutical industry in the Greater Mekong sub-region and ASEAN.

## Major International Companies in the Pharmaceutical Industry

Thailand's cost-effective and high-quality manufacturing processes have played a pivotal role in attracting foreign pharmaceutical companies. The pharmaceutical market is dominated by foreign manufacturers and distributors. Moreover, Thailand has a significant domestic market and local production of generic drugs. The major domestic manufacturer is the Government Pharmaceutical Organization (GPO), run by Thailand's Ministry of Public Health (MPH).

**Baxter**

**MEGA**

**linaria**

**SANOFI**

**Pfizer**

**MERCK**

**Otsuka**

**Takeda**

**gsk**  
GlaxoSmithKline

**AstraZeneca**

**DKSH**

**NOVARTIS**

## MEDICAL DEVICES

Thailand's medical device market has continued to thrive due to several key factors. The growing influx of medical tourists along with the rise in the standard of living of Thai citizens and the government's continued efforts to develop Thailand into a leading medical hub, have led to constant innovation in this area.

In addition to the wide variety of medical devices being manufactured domestically, a substantial number of high-grade and sophisticated medical devices are being imported to meet the rising demand. There are tremendous opportunities for new investment in the kingdom with respect to manufacturing high-end medical devices. Thailand's medical industry demonstrates definite potential toward positioning the country both as a principal Asian medical hub and as a cost-effective production location for global medical devices.

## Thai Medical Diagnosis Kits

### Test Kit for Alpha Thalassemia Carrier Screening

The test was developed by the Biomedical Technology Research Unit of the Faculty of Associated Medical Sciences, Chiang Mai University. It takes only 3 minutes to perform a single test with this test kit. The test is convenient to use, inexpensive and is 99% accurate. At present, the invention has been passed on to private companies for commercial manufacturing.

### Thai Red Blood Cells Test Kit

One of the basic tests in a blood bank laboratory is testing for a reaction between the antigen and the antibody of red blood cells. The development of the Gel Test technique will help avoid errors that occur from identifying results using the conventional sample-shaking technique that involves test tubes. The test results can also be re-read anytime by anyone.

### RFID based diagnostic kits

The Thai government provides support for new developments and innovation not only in the biochemical space, but also in the electronic field. This has led to Thailand increasing its capability to provide one-stop solutions and deliver innovative diagnostic kits. For instance, adapting RFID or "Near field communication" (NFC) into a diagnostic kit enables a new type of user experience. Users can simply use their smart phones to read and analyze data, rather than utilizing traditional analyzer devices. **Silicon Craft Technology**, a RFID microchip company, has introduced the SIC4340 NFC tag IC with a 12-bit ADC. Users can connect and communicate with a diagnostic device or a bio-chemical sensor, to read and analyze data via a NFC-enabled smart phone.

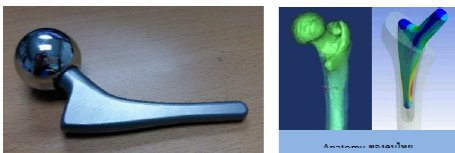


## Implanted Medical Devices

### Acquirement of CE marking and ISO 13485 certification for Thai hip prostheses

The project, co-funded by Chulalongkorn University and TCELS, has completed the development of **Unipolar Modular Hip Prosthesis**, which is a prosthesis model that is more compatible with the anatomy of Asians. The model comprises of **Hip stem, Femoral head and Sleeve**. In 2016, the project has been continuously supported and funded by TCELS to undergo standard testing in overseas laboratories accredited with **Certificate of Accreditation (ISO/IEC 17025)**:

- Performance Test in accordance with ISO 7206, ASTM 2009 and ASTM1875, in Germany
- Biocompatibility Test in accordance with ISO 10993, in Singapore



## ADTEC

Advanced Dental Technology Center



### Advanced Dental Technology Center (ADTEC)

To further enhance dentistry in Thailand, ADTEC was established in 2012 with a mission to design and develop medical devices which are in line with international standard of ISO 13485. The center has successfully implemented the case of **Dental Implant**, which also includes the prototype mini plates and screws for face and jaw bones.

## Medical Robotics in Thailand

To serve Thailand's growing medical service sector, **Thailand Center of Excellence for Life Sciences (TCELS)** has established a **Center for Advanced Medical Robotics**, which is at the forefront of robotics network in Thailand. The center focuses on international and regional investors and users, with an aim to broaden Thailand's research base through Advanced Medical Robotics projects.

With great supporting measures and an extensive network of researchers, Thailand is able to develop medical robots specializing in many different fields. For instance, **Dinsow** elderly care robot, by CT Asia Robotics, Co., Ltd, **Fhasai** robot-assisted therapy for children with autism spectrum disorders, by Mahidol University, **Sensible Tab** arm rehabilitation robot, by TCELS and TMGI Co.,Ltd., etc.



## Major International Companies in the Medical Device Industry



**Baxter**



**SENSIBLETAB**



## INVESTMENT INCENTIVES

### BOI Incentives

BOI offers a wide range of tax and non-tax incentives for projects that meet national development objectives

### Tax Incentives

GROUP	ELIGIBLE ACTIVITIES	INCENTIVES	
		Corporate income tax exemption	Exemption of import duty*
A1	Biotechnology: • R&D activity and/or manufacturing of biopharmaceutical agents • Projects with R&D and/or manufacturing of diagnostic kits for health, agriculture, food and environment Manufacturing of high-risk or high-technology medical devices that involve R&D and innovation	8 years without cap	✓
A2	Manufacture of: • Medical food and supplements • High-risk or high-technology medical devices that does not involve R&D and innovation • Medical devices that are commercialized from public sector research or collaborative public-private sector research	8 years	✓
A3	Manufacture of other medical devices (except for medical devices made of fabrics or fibers)	5 years	✓
A4	Manufacture of medical devices made of fabrics or fibers	3 years	✓
B1	Projects in health rehabilitation centers	-	✓

\*Note: Exemption of import duty on all machinery and exemption of import duty only on raw or essential materials used in manufacturing exported products

### Non-Tax Incentives

These activities also receive the following non-tax incentives:

Permit to bring in expatriates

Permit to take or remit foreign currency abroad

Permit to own land

### Other Government Incentives

Apart from BOI incentives, several types of support are provided by other government agencies and organizations:

#### National Science and Technology Development Agency (NSTDA)

- NSTDA acts as a bridge between academic research and the private sector
- Operating under NSTDA umbrella, **National Center for Genetic Engineering and Biotechnology (BIOTECH)** functions as a premier research institute and human resource development center, with a vision to push Thailand towards a knowledge based society through science and technology.

#### Thailand Science Park (TSP)

- **1<sup>st</sup> technology and innovation hub of Thailand**
- Provides **one-stop service for innovation development and R&D in private sectors**, ranging from technology transfer through ecosystem of more than 3,000 researchers in technology centers, companies & universities, to financial assistance & business incubation.

#### National Innovation Agency (NIA)

- Granted Innovation coupon for approved projects to support 90% of R&D expenses incurred by innovation service providers (in cooperation with the Federation of Thai Industries)
- Provide financial support of **25%-75%** to be granted to prototype or pilot scale projects, and **Interest free loan for up to 3 years** to assist in the start-up of commercial operation of innovation projects

#### Thailand Center of Excellence for Life Sciences (TCELS)

TCELS is a single platform that supports the establishment of life science based businesses and investment in Thailand. TCELS connect companies with local university research facilities and business partners through a matching database and business forum. Some of the areas covered are biopharmaceuticals, cosmetics, medical robotics & devices, and cell & gene products.



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