ADITYA GROUP

INDUSTRY INTELLIGENCE SERIES

Logistics & Supply Chain in Thailand

Strategic Market Report

For Manufacturers, Exporters, Importers, Retailers, Distributors, Logistics Providers and Infrastructure Investors

Thailand | 2026 Website Edition

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Executive Snapshot

Selected report themes, designed to orient executives quickly before the detailed market analysis.

Market Lens	Entry Focus	Risk View	Aditya Role
Thailand	**Partners**	**Compliance**	**Execution**
sector context	channels & routes	operating controls	local support

1. Executive Summary

Thailand is one of ASEAN's most practical logistics and supply chain bases because it combines a manufacturing platform, deep port access, strong road connectivity, improving rail infrastructure, air cargo capacity, industrial estates, export-import capability and proximity to CLMV markets. The sector is not only about transportation; it is increasingly about resilience, customs efficiency, warehousing strategy, supply chain visibility, channel execution and risk control.

The country's logistics challenge is that cost and execution efficiency remain uneven. NESDC estimated Thailand's 2023 logistics costs at THB 2,527.4 billion, equal to 14.1% of GDP. This creates a strategic priority for government and private companies: reduce logistics cost, improve multimodal integration, digitalize customs and supply chains, and strengthen corridor-based connectivity.

For foreign investors and exporters, the opportunity is strongest where logistics is integrated with business strategy: regional distribution, import/export structuring, outsourced warehousing, cold chain, customs support, route-to-market, e-commerce fulfillment, industrial estate supply chains, sourcing and supplier coordination.

Aditya Group perspective Thailand is attractive as a supply chain base, but logistics success depends less on choosing the cheapest transporter and more on designing the right operating model: supplier location, warehouse footprint, Incoterms, customs documentation, importer of record, payment terms, quality checks, inventory policy and last-mile channel execution must work together.

Indicator	Current signal	Strategic interpretation
National logistics cost	THB 2,527.4 billion in 2023, equal to 14.1% of GDP according to NESDC.	Cost efficiency remains a national competitiveness issue and a board-level business concern.
Market size	Private market estimates place Thailand freight and logistics at about USD 53.38 billion in 2025, rising to USD 56.56 billion in 2026.	Large, fragmented market with room for integrated and technology-enabled operators.
Road freight	Road transport remains the dominant domestic mode due to factory, warehouse and retail network structure.	Route optimization, fleet reliability and delivery discipline are critical.
Sea freight	Krungsri expects Thai sea freight services to grow steadily during 2025-2027, supported by trade, e-commerce and infrastructure links.	Export-import businesses need freight strategy, documentation discipline and carrier/forwarder management.
Warehousing	Warehouse demand is expected to rise gradually in 2026-2027, but competition and new supply are increasing.	Warehouse selection should be based on service capability, not rent alone.
Laem Chabang Phase 3	Terminal F1 is expected to start operations in 2027, with F2 expected in 2031.	Port capacity expansion supports Thailand's role as a regional trade gateway.

2. Industry Definition & Scope

The logistics and supply chain industry includes the physical, digital and commercial systems used to move, store, clear, track and deliver goods. In Thailand, it is directly linked to manufacturing, export-import trade, modern retail, e-commerce, tourism and hospitality supply, healthcare/pharma distribution, agro-food processing, automotive, electronics, consumer goods and industrial development.

Core segments covered in this report

- Freight forwarding and customs brokerage: documentation, carrier coordination, customs clearance, shipment planning and trade compliance.
- Road freight and trucking: factory-to-port, factory-to-warehouse, domestic distribution, cross-border trucking and route optimization.

- Sea freight and port logistics: containerized shipping, bulk cargo, tankers, port handling, depot services and freight consolidation.
- Air cargo: high-value electronics, urgent shipments, perishables, samples, medical products and time-sensitive exports.
- Warehousing and distribution centers: general storage, bonded warehouses, built-to-suit facilities, fulfillment centers and inventory control.
- Cold chain logistics: temperature-controlled warehouses, refrigerated transport, food, pharma and premium grocery distribution.
- Last-mile and e-commerce logistics: parcel networks, COD, reverse logistics, marketplace fulfillment and same/next-day delivery.
- Supply chain consulting and operating support: sourcing, vendor coordination, inventory planning, route-to-market, quality control and logistics cost optimization.

What is outside the scope

This report does not treat logistics as a pure real-estate topic or only as infrastructure construction. It focuses on the operating supply chain: how goods move, where they are stored, how they are cleared, how risks are controlled and how clients can build an efficient Thailand-based logistics model.

3. Thailand Market Context

Thailand's logistics position is supported by its central mainland Southeast Asia location, strong manufacturing base, established export ecosystem and connectivity to Laos, Cambodia, Myanmar, Malaysia, Vietnam and China-linked corridors. Bangkok and the Eastern Economic Corridor remain the most important logistics demand centers, while border provinces and regional hubs support cross-border and domestic distribution.

The Third Thailand Logistics Development Plan sets the national direction around infrastructure development, supply chain value, customs facilitation, logistics performance and innovation. This policy framing matters because logistics is increasingly seen as a competitiveness system rather than a transport cost line item.

The government's 2025-2026 infrastructure development plan includes hundreds of transport projects across connectivity, safety and sustainability, with announced budgets of THB 136.49 billion for 2025 and THB 116.96 billion for 2026. For logistics companies and industrial investors, the benefit is not immediate everywhere, but corridor-by-corridor improvements can reshape site selection and route economics.

Priority logistics geographies

Cluster	Role in supply chain	Relevant client use cases
Bangkok Metropolitan Region	Consumption center, head offices, marketplaces, retail channels, last-mile distribution and air cargo access.	E-commerce, consumer goods, healthcare, retail distribution, importer setup, sales channels.
Eastern Economic Corridor / Chonburi-Rayong-Chachoengsao	Manufacturing, automotive, electronics, industrial estates, port access and export production.	Regional distribution, factory setup, supplier development, warehouse/site selection, export logistics.
Laem Chabang / Eastern Seaboard	Thailand's most important container port ecosystem and maritime gateway.	Sea freight, bonded warehousing, customs, export consolidation, industrial cargo.
Suvarnabhumi / Airport corridor	Air cargo, time-sensitive shipments, samples, pharma, electronics and premium goods.	High-value imports/exports, cold chain, emergency logistics, international samples.
Border corridors	Trade with CLMV, China-linked rail/road routes and regional distribution.	Cross-border trucking, customs support, regional market entry, trading operations.

4. Market Intelligence & Key Trends

Trend	What is changing	Strategic meaning
Supply chain resilience replaces lowest-cost logistics	Companies are diversifying suppliers, building safety stock and reviewing reliance on single routes or single origins.	Thailand can win if logistics planning is linked to sourcing, warehousing and customs readiness.
E-commerce and omnichannel reshape distribution	Marketplace sellers, brands and retailers need fulfillment, reverse logistics, COD, tracking and inventory accuracy.	Warehouse and last-mile choices are now commercial strategy decisions, not back-office decisions.
Warehouse market becomes more segmented	General warehouse supply is expanding, while demand is shifting toward e-commerce, cold chain, specialized users and ESG-aligned facilities.	Clients need location/service benchmarking and should avoid choosing facilities on rent alone.
Cold chain demand strengthens selectively	Food, ready-to-eat, frozen products, pharma and premium grocery require temperature control and compliance evidence.	Opportunity exists for quality cold-chain partners, but electricity cost and service discipline matter.
Sea freight remains central but volatile	Geopolitics, alliances, freight cycles, IMO rules and port congestion can shift cost and schedules.	Forwarder selection, route planning, Incoterms and documentation control are essential.
Digital visibility becomes expected	IoT, WMS, TMS, API tracking and data dashboards are moving from optional to expected.	Clients need logistics partners that can provide control and exception management, not only transport.
ESG and green logistics rise	Warehouse energy efficiency, EV fleets, modal shift, packaging reduction and emissions reporting are gaining importance.	Exporters and global brands need sustainability-ready supply chain data and operational proof.
Cross-border logistics gets more strategic	Thailand's links to Laos, Cambodia, Myanmar, Malaysia and China routes create regional opportunities but also documentation and border-risk complexity.	Companies need local route knowledge, customs support and risk buffers.

5. Opportunity Landscape

Logistics opportunities in Thailand are strongest where clients need integrated execution rather than fragmented services. Many foreign companies can find a forwarder or warehouse. The real value is in designing an operating model that reduces risk, improves delivery reliability and supports commercial growth.

Priority opportunity areas

- Regional distribution hubs: Thailand-based stockholding for ASEAN, CLMV and selected global markets, using a mix of sea, road and air routes.
- Import and distribution setup: importer of record, product registration coordination, customs classification, warehousing and downstream channel support.
- Export consolidation: supplier coordination, quality checks, packaging, documentation, freight booking and buyer shipment coordination.
- Industrial supply chain support: supplier mapping, factory logistics, inbound components, inventory planning and outbound delivery coordination.
- E-commerce fulfillment: inventory management, pick/pack, marketplace integration, last-mile delivery and returns handling.
- Cold chain and controlled logistics: food, spa/wellness, pharma-adjacent, hospitality supply and premium products requiring temperature or quality control.
- Supply chain cost optimization: freight benchmarking, warehouse footprint review, stock policy, packaging optimization and Incoterms review.
- Cross-border trade support: CLMV route planning, documentation, local agents, border risk and regional buyer/supplier coordination.

- Sustainable supply chain design: packaging reduction, ESG-friendly warehousing, emissions data, vendor scoring and supplier compliance.

Opportunity filter A logistics opportunity should be tested through five questions: What product is moving? Who legally imports or exports it? Where should stock sit? What service level is required? What risk is unacceptable: delay, damage, stockout, customs issue, cashflow blockage or reputational failure?

6. Competitive & Operating Environment

Thailand's logistics market is highly fragmented, with global integrators, regional forwarders, Thai trucking companies, warehouse developers, cold-chain specialists, courier networks, customs brokers, marketplace-linked operators and informal small providers. Competition is intense, but service quality varies widely.

Operating realities

- Road freight is flexible and dominant but exposed to fuel cost, driver quality, route discipline, accident risk and delivery reliability issues.
- Sea freight is cost-efficient for heavy and large-volume cargo, but schedule reliability depends on global routes, carrier alliances and port conditions.
- Air cargo is essential for urgent and high-value goods, but it is costlier and sensitive to capacity, documentation and customs readiness.
- Warehousing is shifting from passive storage to technology-enabled fulfillment, inventory accuracy, value-added services and ESG-compliant facilities.
- Cold chain requires operational discipline: temperature logging, SOPs, backup power, loading/unloading control and trained staff.
- Customs brokers and forwarders can make or break the client experience; incorrect HS codes, licenses or documents create delays and penalties.
- Many foreign companies underestimate Thai-language coordination, local vendor management and informal operating details.

Service provider due diligence checklist

Area	Questions to ask	Why it matters
Licenses and legal status	Is the provider properly registered and licensed for the services offered?	Reduces compliance and counterparty risk.
Track record	Which industries, cargo types and routes has the provider handled?	Experience must match the cargo profile.
Systems	Does the provider offer WMS/TMS, tracking, reporting and exception alerts?	Visibility is critical for client control.
Insurance and liability	What is covered, excluded and claimable?	Damage/loss disputes often arise from unclear liability.
Customs capability	Can they advise on HS codes, permits, FDA/industrial standards and documentation?	Customs issues can stop commercial launches.
Financial stability	Can the provider sustain credit terms, peak periods and fuel volatility?	Weak providers create continuity risk.

7. Regulatory & Compliance Considerations

Logistics compliance in Thailand extends beyond trucking and freight booking. It can include customs, product registration, transport permits, warehouse licenses, tax, insurance, food/pharma controls, dangerous goods rules, foreign business structure, import-export licensing, labor and environmental requirements.

Area	Issues to review	Business impact
Customs and HS classification	Import/export declaration, tariff classification, valuation, certificates of origin and supporting documents.	Incorrect classification can cause penalties, delays and landed-cost errors.
Product-specific approvals	Thai FDA, TISI, Department of Agriculture, Department of Livestock, cosmetics, food, medical and chemical controls where relevant.	Product cannot legally move or sell without required approvals.
Importer/exporter structure	Importer of record, distributor, BOI company, trading company, branch or local partner model.	Determines liability, VAT, duty, documentation and customer ownership.
Warehouse and bonded facilities	Bonded warehouse rules, inventory records, customs control and audit obligations.	Useful for cashflow and duty deferral but requires disciplined recordkeeping.
Transport and cargo liability	Carrier liability, insurance coverage, temperature claims, force majeure and subcontracting risk.	Contract gaps can leave clients unprotected.
Cross-border trade	Border documents, transit rules, local agents, route restrictions and country-specific compliance.	Regional trade requires more than domestic Thai logistics knowledge.
Data and digital systems	PDPA, customer data, shipment tracking data and platform integration.	Logistics systems increasingly process customer and transaction data.

8. Market Entry & Growth Strategy

For foreign companies, the best logistics strategy depends on whether Thailand is used as a sales market, sourcing base, production base, regional hub or re-export platform. Each model requires a different legal, customs, warehouse and partner structure.

Model	Best suited for	Key decisions
Distributor-led logistics	Foreign brands testing Thailand with a local distributor.	Distributor capability, inventory ownership, service levels, visibility and customer data access.
Importer of record + outsourced 3PL	Companies wanting control without building own infrastructure.	IOR structure, customs process, warehouse selection, ERP/WMS integration and liability.
Regional distribution hub	Brands or manufacturers serving Thailand and neighboring markets.	Location, bonded status, transport corridors, stock policy, tax/VAT and regional documentation.
Factory or supplier-linked logistics	Manufacturing, sourcing, OEM/ODM and export operations.	Inbound supply, packaging, quality checks, consolidation, Incoterms and buyer shipping terms.
E-commerce fulfillment model	Consumer brands, marketplace sellers and D2C pilots.	SKU count, returns, last-mile SLAs, COD, marketplace API integration and inventory accuracy.
Cold-chain model	Food, pharma-adjacent, premium grocery, wellness and hospitality products.	Temperature profile, SOPs, backup power, regulatory documentation and traceability.

Recommended execution sequence

- Define the business model: import for Thai sales, export from Thailand, regional hub, sourcing, production or marketplace fulfillment.
- Map product compliance before logistics: licenses, Thai FDA/TISI/sector permits, customs HS code, labeling and certificates.
- Design the landed-cost model: product cost, duty, VAT, freight, insurance, port charges, warehouse, delivery and working capital.
- Select partners based on capability: forwarder, customs broker, 3PL, trucking, warehouse, cold chain, marketplace and distributor.
- Pilot with controlled volumes: test documentation, lead times, damage rates, inventory accuracy and customer service levels.
- Scale with governance: dashboards, KPIs, vendor reviews, insurance, escalation rules and cashflow control.

9. Risks & Practical Challenges

Risk	Typical issue	Mitigation
Customs delay	Incorrect HS code, missing license, unclear valuation or incomplete documents.	Pre-check documentation, classification and approvals before shipment.
Hidden landed cost	Freight, port fees, demurrage, storage, duty, VAT and last-mile costs underestimated.	Build full landed-cost model before pricing.
Supplier coordination failure	Late production, poor packing, wrong labeling or incomplete export docs.	Use vendor checklist, inspections and shipment readiness controls.
Warehouse mismatch	Cheap warehouse lacks systems, staff, location or service capability.	Benchmark total service cost and operational fit.
Cold chain failure	Temperature excursion, poor loading practices or inadequate monitoring.	Use SOPs, temperature logging and trained providers.
Cashflow blockage	Long credit terms, high stockholding, duty/VAT cash outlay and slow collection.	Plan working capital and payment terms with shipment cycle.
Partner dependency	Single forwarder, single distributor or single transporter creates vulnerability.	Maintain alternative routes and backup providers.
Regulatory change	Tariffs, border rules, product standards or documentation requirements change.	Monitor rules and keep compliance responsibility clear.

Practical warning In Thailand, logistics problems often appear as transport delays, but the root cause is frequently commercial or administrative: incomplete permits, unclear payment responsibility, poor packaging, missing certificates, weak importer coordination or unrealistic delivery promises.

10. How Aditya Group Can Help

Aditya Group supports clients at the intersection of market entry, trading, sourcing, operations and execution. For logistics and supply chain projects, the group can help clients design the operating model, identify vendors, structure import/export processes, coordinate suppliers and build practical execution control.

Client need	Aditya Group support	Output
Thailand logistics feasibility	Assess routes, warehouse locations, customs requirements, landed cost and partner options.	Feasibility note, cost model and execution roadmap.
Import/export setup	Support company/partner structure, importer/exporter model, customs documentation and approval path.	Operating structure and compliance checklist.

Client need	Aditya Group support	Output
Sourcing-linked supply chain	Coordinate suppliers, packaging, quality checks, shipment readiness and export documents.	Supplier-to-shipment control process.
3PL/warehouse partner selection	Identify, screen and compare logistics providers, warehouses, cold-chain operators and brokers.	Shortlist, comparison matrix and negotiation support.
Route-to-market logistics	Connect inventory plan with distributor, retailer, marketplace, corporate buyer or hospitality customer requirements.	Channel-linked logistics model.
Cost and risk optimization	Review freight, warehouse, stock policy, Incoterms, insurance and credit terms.	Cost-control and risk-reduction recommendations.
Ongoing coordination	Act as local execution support between foreign client, Thai suppliers, logistics vendors and customers.	Managed communication, progress tracking and issue resolution.

11. Aditya Group Perspective

The strongest logistics opportunities in Thailand will not come from simply adding trucks, warehouses or freight contracts. They will come from solving client pain points: landed-cost uncertainty, customs risk, weak supplier coordination, inventory imbalance, fragmented vendors, poor visibility and slow execution.

For foreign companies, Thailand is a credible supply chain base when the operating model is built properly. The country offers manufacturing depth, port access, road networks, industrial estates and access to regional markets. However, the practical success factors are local: Thai-language coordination, trusted vendors, compliance knowledge, commercial negotiation and hands-on follow-through.

Aditya Group's value is strongest when a client needs more than market information. The group can help translate strategy into setup, partners, documentation, supplier control, logistics workflows and measurable execution.

Sources

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Build the Right Thailand Entry Strategy

Aditya Group helps clients evaluate market potential, identify partners, structure practical entry routes and coordinate local execution in Thailand.

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Website: www.adityagroupthailand.com **Email:** contact@adityagroupthailand.com