

# Thailand's Waste Management Industry



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Thailand's waste management industry has been driven by several plans and supports, including the Second National Waste Management Action Plan (2022–2027) and BOI incentives. As a result, management performance for the four major wastes, including municipal solid waste, municipal hazardous waste, industrial waste, and infectious waste, has continued to improve. The market structure shows high competition in wholesale, with concentration in waste collection and transportation and in treatment & disposal operations.

However, Thailand still faces governance and structural challenges, including limited resources and facilities, low awareness of source separation among waste generators, limited mandatory regulations, and more. These factors pose barriers to industry growth.

Several trends have been identified to shape the transition of the industry including stricter regulations and a shift toward circular economy practices. These create opportunities for investment in infrastructure including collection, separation, recycling, treatment and disposal sites, as well as for investments in technologies to improve performance. Moreover, strategic partnerships are also key to strengthening the industry.

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I. Snapshot



**Total Waste Generation in 2024**  
**52.35 million tons**

**Waste Generation & Management by Major Waste Types**



**No. of Waste Management Companies (2025)**

**Total 5,385 Waste Management Firms**

**CAGR 2020-2025 +3.8%**



**Key Players\* (2024)**

**Collection, Transportation, Wholesale & Recycling**

- America Metal Industry (Thailand) Co.,Ltd.
- MD Metal Trading Co.,Ltd.
- Hidaka Yookoo Enterprises Co.,Ltd.

**Treatment & Disposal**

- Sci Eco Services Co.,Ltd.
- Insee Ecocycle Co.,Ltd.
- Better World Green PCL



**Future Trends**

**Circular Economy**

**Digital Transformation**

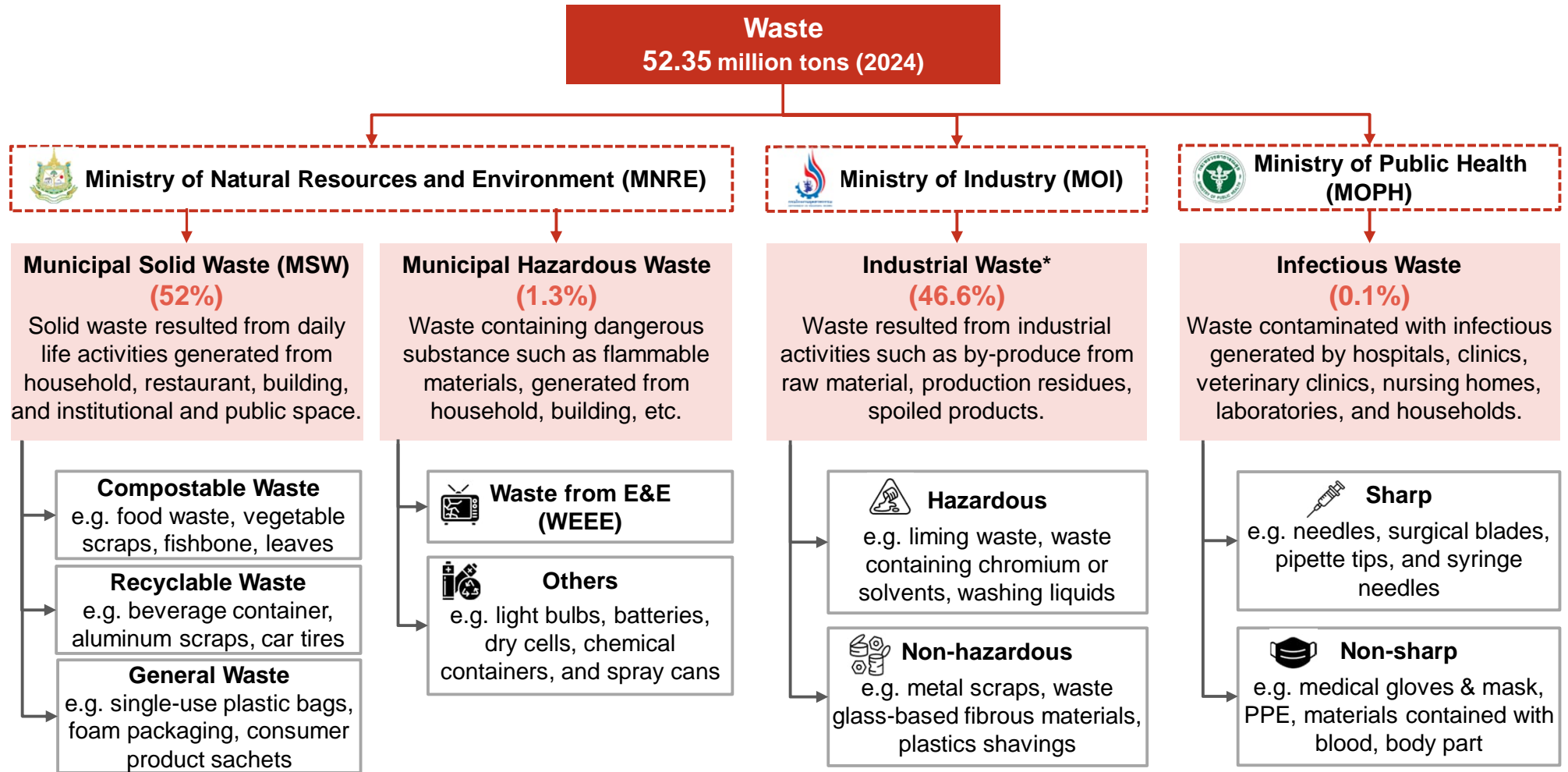
**Stricter Regulation**

Note: \*Key players in waste collection, transportation, wholesale, and recycling are compiled from businesses registered under TSIC codes 38110, 38120, 46695, and 38300; waste treatment and disposal are compiled from TSIC codes 38211, 38212, 38213, 38219, 38221, and 38222. See Appendix for details.

## II. Overview of Waste Structure

- Thailand's waste structure is classified into 4 main categories including municipal solid waste, municipal hazardous waste, industrial waste, and infectious waste, which are governed by three different government agencies.

### Overview of Waste Structure



Note: \*Industrial waste mentioned in this section does not include wastewater generated from factory operations which have not been treated and discharged through pipelines for external treatment outside the factory premises.

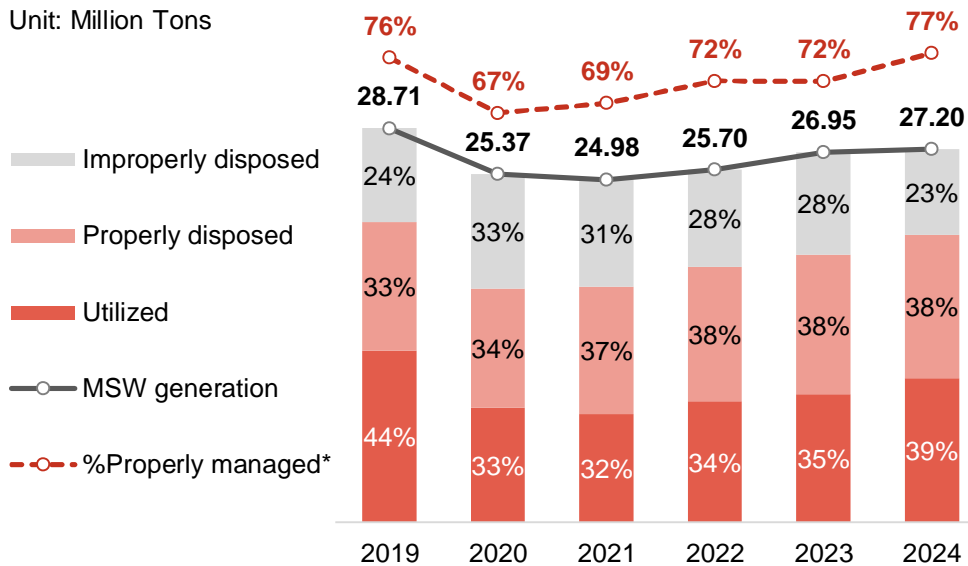
### III. Waste Generation & Management Trend: Municipal Solid Waste (MSW)

- In 2024, Thailand's MSW management has improved, driven mainly by government policies, expanded community engagement and enhanced waste disposal efficiency.
- However, insufficient collection and disposal infrastructure, along with stringent source separation regulations and disposal operation controls, remain key barriers to increasing proper MSW management.

#### Generation & Management Trend: Municipal Solid Waste (MSW) (2019-2024)

MSW Generation & Management Trend

Unit: Million Tons



#### MSW Generation Trend

- MSW generation **declined** in 2020–2021 due to lockdowns from COVID-19 that restricted tourism, but gradually increasing afterward as tourism and commercial activity resumed.
- In 2024, MSW generation totaled 27.2 million tons, with **food waste** representing the largest share at 36.79%.
- While **single-use plastics** represented 10.6%, down from 2023 as Thai government continued its plastic-waste reduction promotion.

#### MSW Management Trend

- **The utilization rate** has recovered after COVID-19, driven by
  - Government policies promoting waste separation and recycling, such as the 3Rs and the Clean Province initiatives.
  - Expanded community engagement, such as the expansion of community waste banks, encourages residents to separate recyclable waste and convert it into income.
  - Increased private investment in sorting technology.
- **The properly disposed rate** has increased since 2019 as local administrations have improved disposal efficiency by investing in disposal technologies, upgrading open dumping sites to sanitary landfills, and establishing centralized infrastructure (clusters) shared within multiple communities.
- However, **improperly disposed rate** were still high, mainly due to inadequate collector and separator, insufficient disposal facilities and lack of mandatory source-separation regulations.

Number of Disposal Sites & Transfer Stations	2023	2024
<b>Proper MSW disposal sites</b> (e.g. sanitary landfill, waste-to-energy, RDF)	114	120
<b>Improper MSW disposal sites</b> (e.g. open dump, incinerator without air polluted control)	1,965	1,937
<b>Transfer stations</b>	36	34
<b>Total</b>	<b>2,115</b>	<b>2,091</b>

Note: \*%Properly managed mentioned in this section refer to the proportion of utilized and properly disposed to total MSW generation.

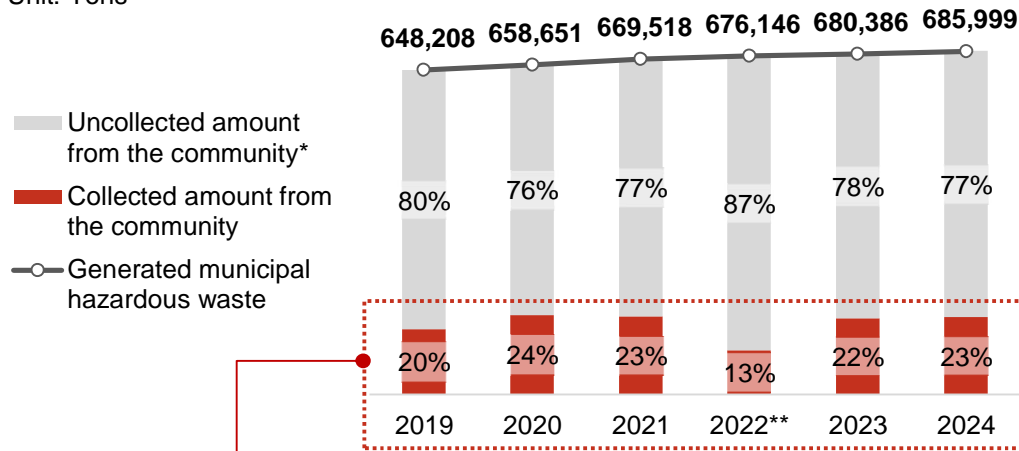
### III. Waste Generation & Management Trend: Municipal Hazardous Waste (MHW)

- Despite the high rate of proper management for collected municipal hazardous waste, more than 77% of total generated waste remained uncollected, leading to improper management.
- Key barriers include improper source separation, mixing with MSW and limited drop off points for collection.

#### Generation & Management Trend: Municipal Hazardous Waste (2019-2024)

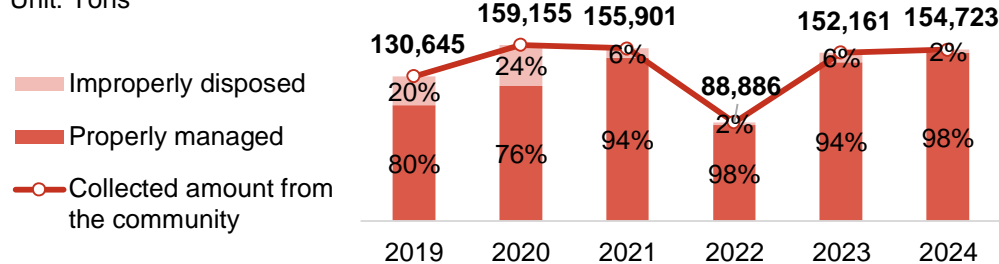
Municipal Hazardous Waste Generation Trend

Unit: Tons



Municipal Hazardous Waste Management Trend

Unit: Tons



#### Municipal Hazardous Waste Generation Trend

- Municipal hazardous waste grew at a 1% CAGR from 2019–2024, driven mainly by
  - Technology advancement that increase consumer demand for E&E products.
  - Short product lifecycle, especially low-quality E&E waste, that create fast growing of waste.
- Approximately 21% of generated waste can be collected within communities for further management, on average, due to improper source separation and mixing with MSW.
- Moreover, drop-off points are not broadly available and are concentrated in major provinces.
- Consequently, this creates difficulties in the collection and proper management of municipal hazardous waste.

#### Municipal Hazardous Waste Management Trend

- Of the collected municipal hazardous waste, 98% was properly managed in 2024, up from 80% in 2019 due to improvements in disposal technology and recycling efficiency.
- Although most collected waste is properly managed, the overall management rate remains low compared with total waste.
- This gap creates opportunities for private sector to enter the market, particularly in waste separation and collection.

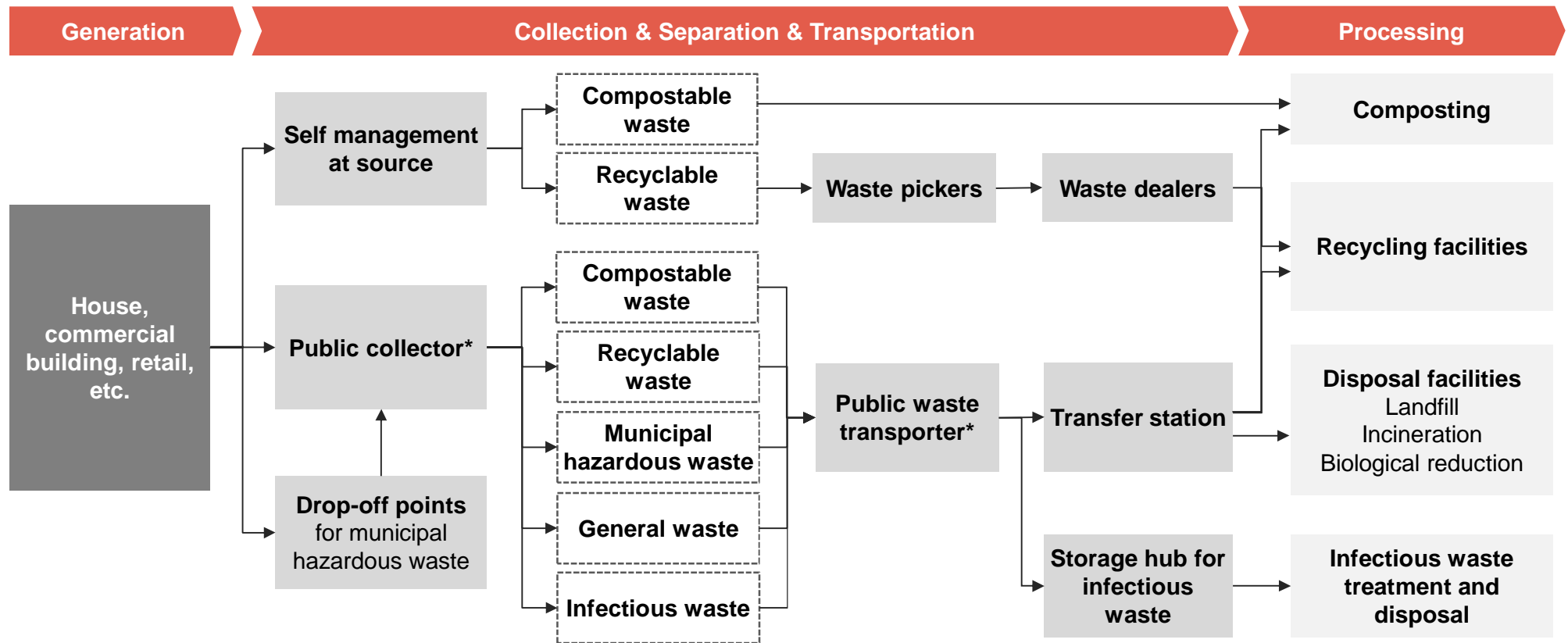
Note: \*Uncollected waste from the community refer to municipal hazardous waste that cannot be picked up by waste collector.

\*\*The large drop in collectable amount in 2022 results from a different data collection source.

### III. Waste Generation & Management Trend: Process Flow for Management of MSW & MHW

- MSW management flow is divided into three main stages: generation; collection, separation, and transportation; and processing, with multiple stakeholders involved in the flow.
- Local administrative organizations are key stakeholder in managing MSW collection, separation and transportation, while waste pickers and dealers play crucial role in MSW recycling.
- Household infectious waste is governed by infectious waste regulations which is separated from MSW management.

#### Process Flow for Management of Municipal Solid and Hazardous Waste



Controlled by **Department of Local Administration**  
 Regulated by **Ministry of Natural Resources and Environment, Ministry of Interior and Ministry of Public Health.**

Note: \*Public collector and transporter are operated by local administrative organizations (LAOs) or private entities authorized by LAOs.

### III. Waste Generation & Management Trend: Industrial Waste (1/2)

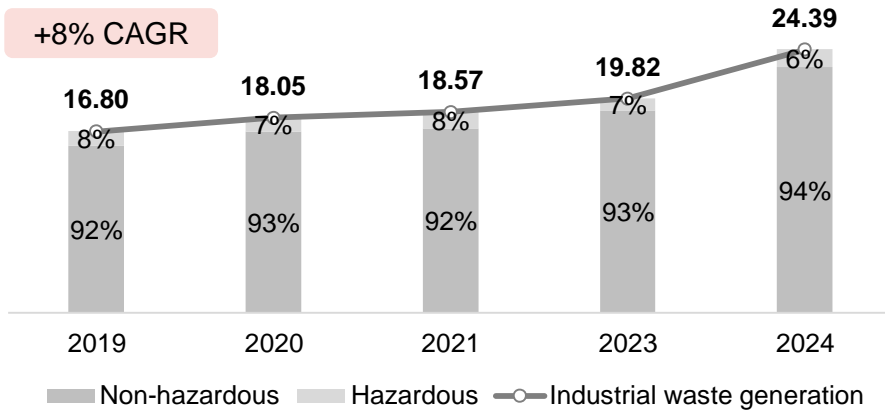
- Despite rising industrial waste generation, Thailand improved its industrial waste management, with 89% properly managed in 2024, driven mainly by stricter regulations and advances in waste-processing technology.
- Nearly half of the properly managed waste was reused as raw material, followed by recycling, energy recovery, and exports.

#### Generation & Management Trend: Industrial Waste (2019-2024)

##### Industrial Waste Generation\* Trend

Unit: Million Tons

+8% CAGR



##### Industrial Waste Generation Trend

- From 2019-2024, industrial waste generation rose steadily, driven by an expansion of new factories as well as increased production in sectors such as automotive and parts, food & beverage and packaging.

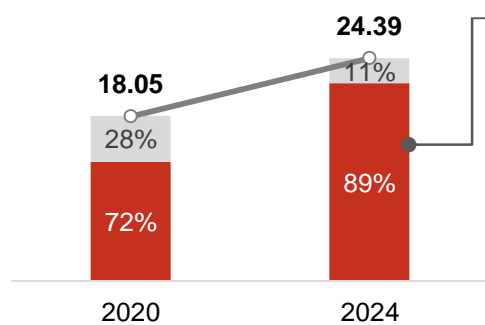
##### Industrial Waste Management Trend

- During 2020-2024, proper management rate increased from 72% to 89%.
- This is mainly due to stricter regulations, advanced technology that drive waste processing efficiency and increased waste processing facilities.
- Of total proper management in 2024, **44%** were is **reused as raw material** through activities such as resale, composting or soil conditioner, and use as component in animal feed.
- This is followed by **recycle, use for energy, and exports**.

##### Industrial Waste Management Trend

Unit: Million Tons

Improperly disposed  
Properly managed  
Industrial waste generation



##### Industrial Waste Management By Methods (2024)

Management Method	Hazardous Waste	Non-Hazardous Waste	Total
Use as raw material	93,127	9,393,320	9,486,447 (44%)
Recycle	825,138	5,925,036	6,750,174 (25%)
Use for Energy	474,159	4,853,514	5,327,673 (31%)
Exports	210	101,504	101,714 (0.5%)
<b>Total Management</b>	<b>1,392,634</b>	<b>20,273,375</b>	<b>21,666,008</b>
<b>% Properly Managed</b>	<b>85%</b>	<b>89%</b>	<b>89%</b>

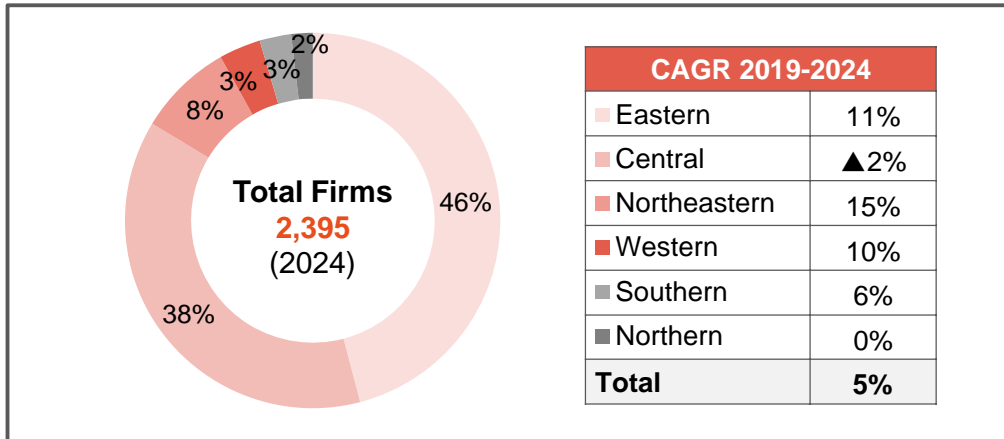
Note: \*The absence of 2022 data results from a different data collection method, which causes a significant difference in the numbers.

### III. Waste Generation & Management Trend: Industrial Waste (2/2)

- In 2024, there are 2,395 waste processors nationwide, with majority located in eastern and central regions.
- Beverages, food, and vehicles & related equipment were the main waste sources received by waste processors, suggesting potential investments for technology solutions in processing those wastes.

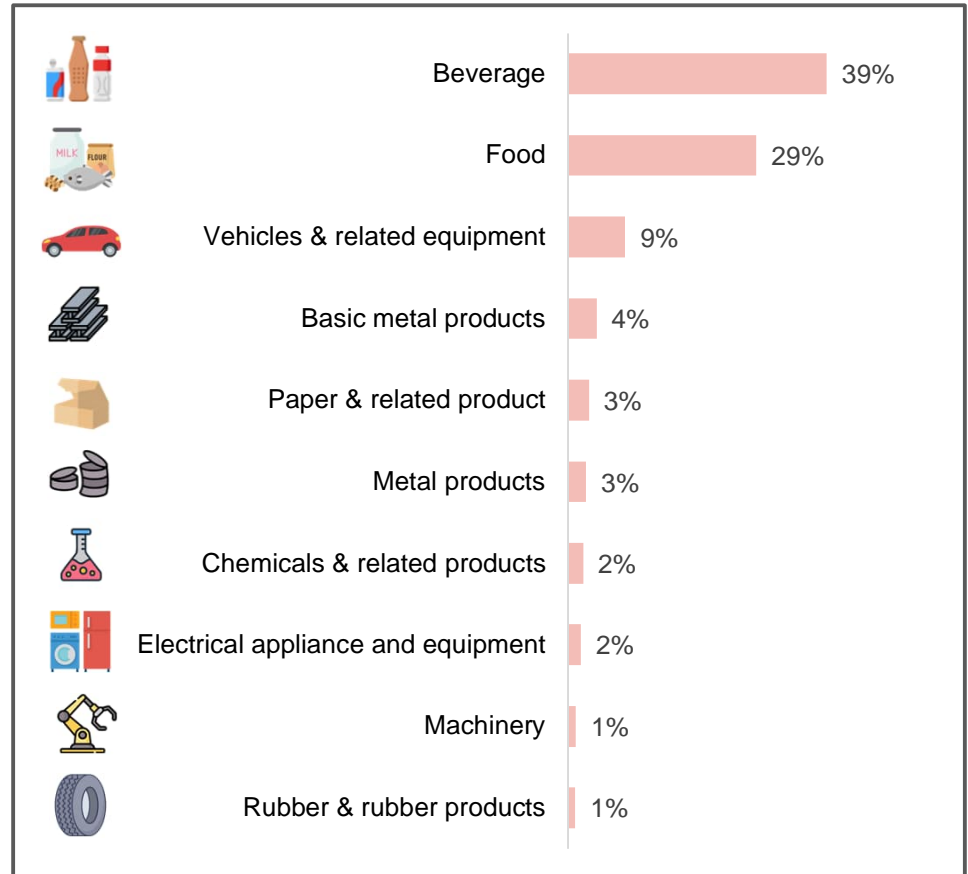
#### Industrial Waste Management (2024)

No. of Waste Processors\* by Regions (2024)



- Currently, more than 80% of waste processing factories located in eastern and central as majority of factories highly concentrated in these regions particularly in the EEC and BMR.
- Moreover, the eastern region also shows substantial growth in the number of waste processors.
- Major industries in these regions are automotive & parts and plastics & related products.
- In 2024, beverages, food, and vehicles & related equipment were the primary waste sources handled by waste processors.
- This indicates potential investment opportunities in targeted recycling treatment or disposal technologies for these wastes.

Amount of Industrial Waste Received by Waste Processor by Top 10 Industries (2024)

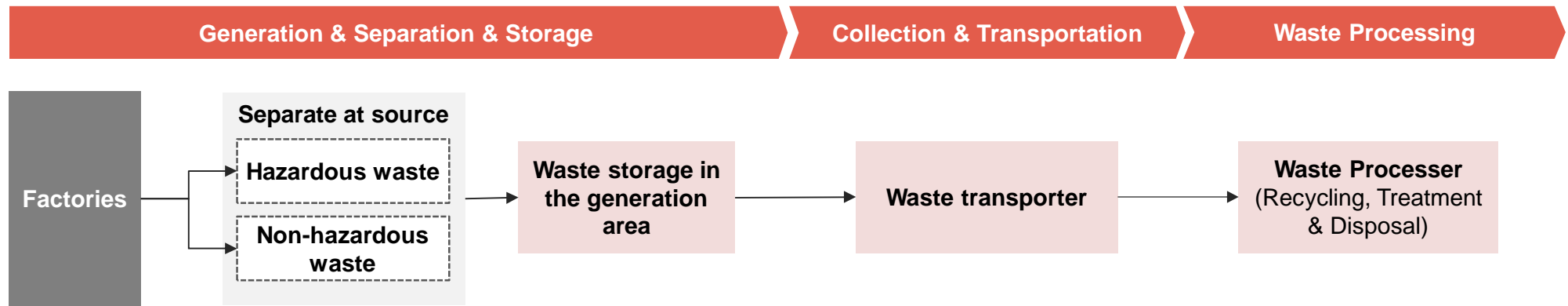


Note: \*Waste processor refer to recycle, treatment and disposal facilities.

### III. Waste Generation & Management Trend: Process Flow for Management of Industrial Waste

- The flow of industrial waste management is structured and systematic under stringent regulations that require factories to be responsible for waste from generation to final processing, with mandatory data reporting in a system administered by DIW.

#### Process Flow for Management of Industrial Waste



#### Industrial Waste Generator

- Must **classify waste** as hazardous or non-hazardous according to **the six-digit waste code** and store it in appropriate containers labeled with the generator's name, waste code, and the start and end dates of containment.
- Must **obtain permission** before taking waste outside the factory for offsite processing.
- Must **notify waste-management details** via the DIW website, and **report the transporter and processor information** until the waste is transferred to the designated processor.

#### Industrial Waste Transporter

- Must hold a valid operating permit (for hazardous waste)
- **Ensure transport vehicles are tracked and monitored** in accordance with the criteria, methods, and conditions prescribed by DIW.

#### Industrial Waste Processor

- Must **inspect and/or collect samples** using random sampling methods to verify compliance with regulations on unused materials.
- Prepare a **Fingerprint Report**, and submit it to the generator along with **the waste management method**

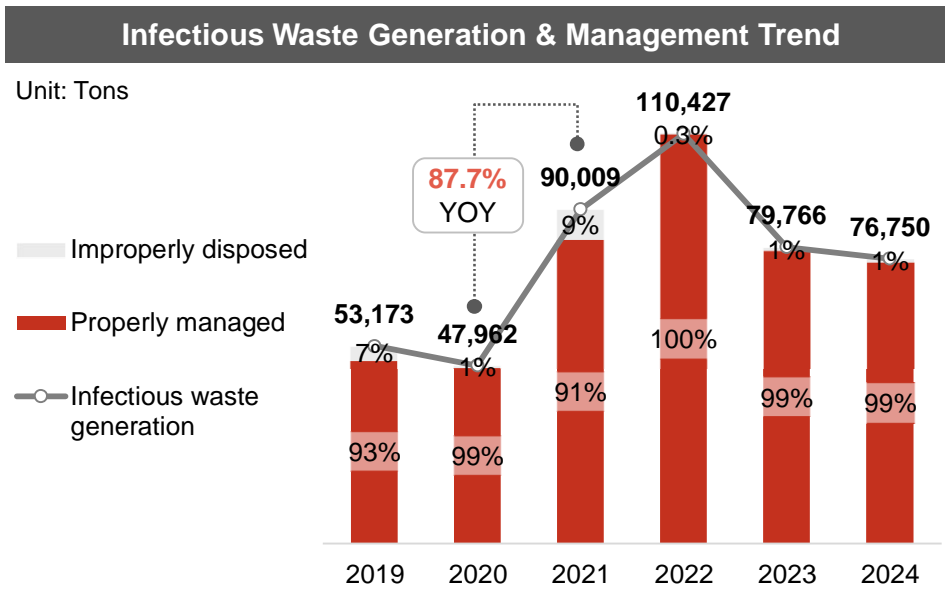


Controlled and regulated by Department of Industrial Works

### III. Waste Generation & Management Trend: Infectious Waste

- Almost all generated infectious waste was properly managed due to strict MOPH regulations.
- Remaining gaps are attributed to improper source separation and collection challenges from small healthcare facilities.

#### Generation & Management Trend: Infectious Waste (2019-2024)



#### Infectious Waste Generation Trend

- Infectious waste generation grew 87.7% YOY from 2020 to 2021.
- This resulted by COVID-19 that increase waste from various sources beyond hospitals, including field hospitals, waiting centers, community isolation centers, hospitels, quarantine facilities, and vaccination sites.
- Waste generation continued to rise in 2022 as the pandemic persisted.
- From 2023 to 2024, after the peak of the pandemic, infectious waste declined but remained above pre-pandemic levels.
- This is due to greater health awareness that driven demand for healthcare related supplies such as mask, ATK.
- Moreover, the growth of the healthcare sector also led to more medical and healthcare-related waste.

No. of Infectious Waste Treatment & Disposal Facilities (2024)		
Off-site	Local government disposal sites	9
	Private disposal sites	10
	Disposal system of universities	3
	<b>Total off-site facilities</b>	<b>22</b>
On-site	Incineration	8
	Steam autoclaving	14
	<b>Total on-site facilities</b>	<b>22</b>
<b>Total</b>		<b>44</b>

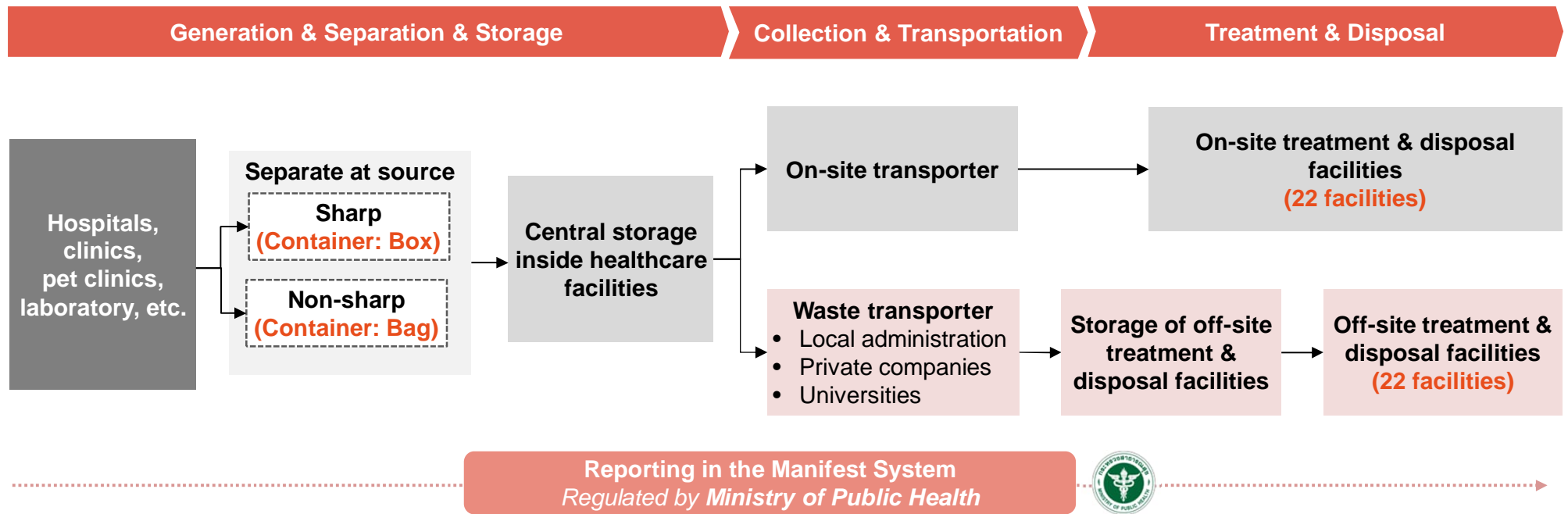
#### Infectious Waste Management Trend

- In 2024, 99% of total generated waste were properly managed, due to strict control and regulation controlled by Ministry of Public Health.
- While 1% were still improperly disposed, largely due to improper source separation and collection challenges from smaller healthcare facilities, including private clinics, veterinary clinics, and households.
- Infectious waste can be properly managed at on-site hospital disposal facilities or at off-site facilities, including those operated by public or private sector entities.
- Currently, the majority of infectious waste is managed off-site by local governments and private facilities.

### III. Waste Generation & Management Trend: Process Flow for Management of Infectious Waste

- Infectious waste management must comply with Ministry of Public Health regulations.
- Prior to collection, waste shall be segregated and stored on-site, and all stakeholders must record each transport in the Manifest System.

#### Process Flow for Management of Infectious Waste



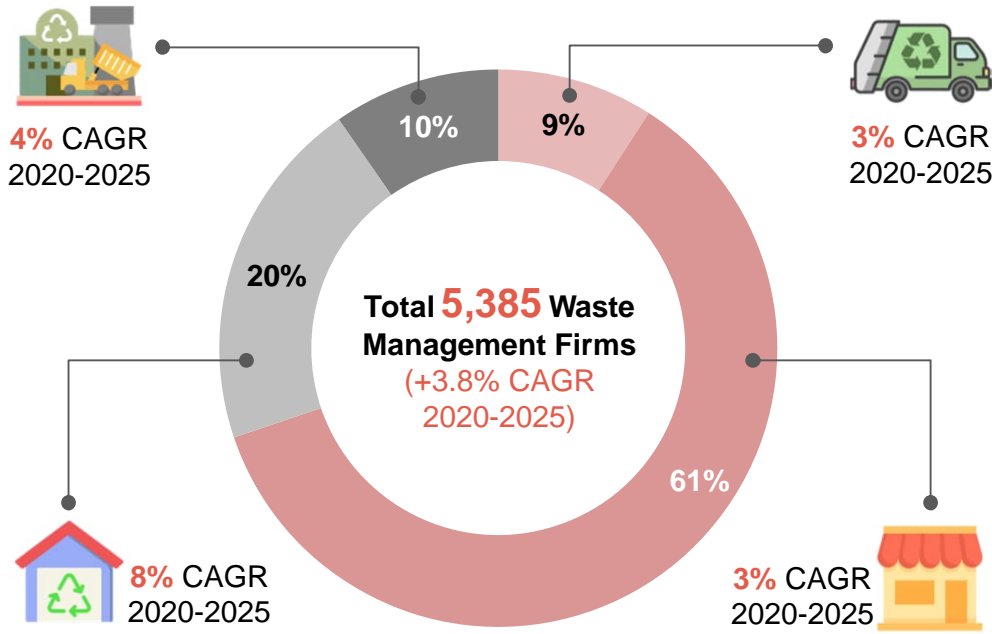
- Infectious waste must be **separated at the source** and kept in **the container** according to waste type.
- After separation, waste should be **stored in an infectious waste storage area** located in a separate room or building that meets hygiene standards before collection for treatment or disposal, either on-site or off-site.
- Transport to on-site or off-site facilities must use **vehicles that comply with the requirements** prescribed by the Ministerial Regulation.
- All stakeholders including infectious waste generators, transporters, and treatment/disposal operators must **record the required information** in the **Manifest System** for every transport of waste.

## IV. Waste Management Business in Thailand: Overview

- In 2025, the number of waste management firms reached 5,385, a 3.8% CAGR since 2020, with waste recycling business showing the strongest growth among segments.
- About 61% of firms operating in wholesale and trading as this business requires a lower investment and technology compared with recycling and treatment & disposal, suggesting rising competition in wholesale.

### Waste Management Business in Thailand\* (2025)

No. of Waste Management Businesses in Thailand

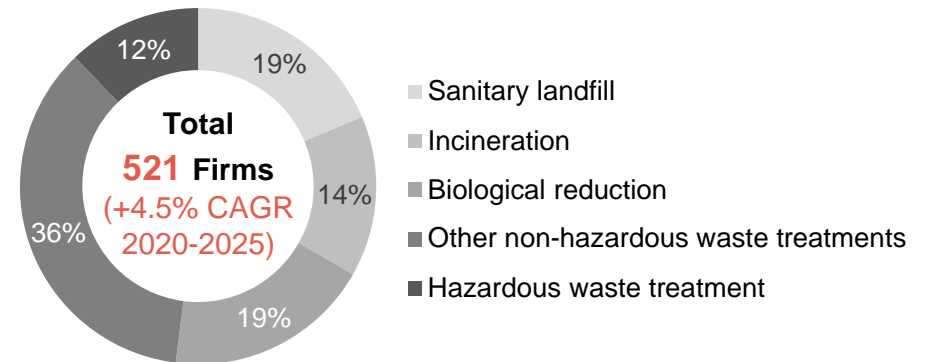


- Waste Collection & Transportation (TSIC 38110, 38120)
- Wholesale of waste, scrap and materials for recycling (TSIC 46695)
- Waste Recycling (TSIC 38300)
- Waste Treatment & Disposal (TSIC 38211, 38212, 38213, 38219, 38221, 38222)

Waste Collection & Transportation by Waste Type



Waste Treatment & Disposal by Method



Note: \*Please note that waste management businesses are derived from the companies registered under TSIC codes related to waste management including waste collection and transportation, wholesale of waste, waste recycling, and waste treatment and disposal (see the appendix for description).

## IV. Waste Management Business in Thailand: Key Players (1/2)

- American Metal Industry (Thailand) Co., Ltd. leads the waste management sector with expertise in scrap metal recycling.
- Industry leaders focus on industrial waste handling, with many companies offering multiple services instead of single services such as Hidaka Yookoo Enterprises Co.,Ltd. and Miracle Intertrade Co., Ltd. that offer all major services.
- While some companies are also providing transportation as part of a broader waste management solution.
- All listed major companies are not offer waste management services for infectious waste.

### Key Players: Collection, Transportation, Wholesales and Recycling\*

#	Company Name	Major Nationality	2024 Net Sales (mTHB)	Services					Waste Handling	
				Transport	Separation	Wholesales	Recycling	Others	Municipal Waste****	Industrial Waste
1.	America Metal Industry (Thailand) Co.,Ltd.	US	10,475		✓	✓	✓			✓
2.	MD Metal Trading Co.,Ltd.	Thai	8,555			✓	✓		✓	✓
3.	Hidaka Yookoo Enterprises Co.,Ltd.	Thai	8,410	✓	✓	✓	✓			✓
4.	Siam Ishikawa Metals Co.,Ltd.	Japanese	2,907		✓		✓		✓	✓
5.	Miracle Intertrade Co.,Ltd.	Thai	2,870	✓ ***	✓	✓	✓			✓
6.	Gaew Grung Thai Co.,Ltd.	Thai	2,818	✓		✓	✓		✓	✓
7.	Shun Yi International Trading Ltd.	British Virgin Island	2,650		✓		✓		✓	✓
8.	Four Sons Eastern Steel Co.,Ltd.	Thai	1,902			✓	✓			✓
9.	Win Che (Thailand) Co.,Ltd.	Thai, Taiwan	1,134		✓	✓	✓		✓	✓
10.	WN Associate Co.,Ltd.	Thai	601			✓				✓
11.	Thai Paiboon Equipment Co., Ltd.	Thai	580	✓	✓		✓	RDF, Biogas	✓	
12.	Amata Facility Services Co.,Ltd.****	Thai	563	✓	✓			RDF	✓	✓

Note: \*Key players are companies registered with TSIC related to waste collection, transportation, wholesale, and recycling that have websites and listed by sales.

\*\*Municipal waste include municipal solid waste and municipal hazardous waste.

\*\*\*Transportation is carried out by the company's subsidiary (M I Logistics Co., Ltd.)

\*\*\*\*The company provides services exclusively within Amata Industrial Estate.

## IV. Waste Management Business in Thailand: Key Players (2/2)

- Sci Eco Services Co., Ltd., part of the SCG Group, is a prominent waste treatment and disposal company, specializing in incineration, co-processing, gasification, and waste-to-energy for MSW and industrial waste.
- Besides treatment and disposal, most leading companies offer other solutions, particularly transportation.
- Akkhie Prakarn PCL is the only company offering treatment and disposal solutions for infectious waste.

### Key Players: Treatment & Disposal\*

#	Company Name	Major Nationality	2024 Net Sales (mTHB)	Treatment & Disposal			Waste-to-Energy	Other Services	Waste Handling		
				Landfill	Incineration	Others			Municipal waste**	Industrial Waste	Infectious Waste
1.	Sci Eco Services Co.,Ltd.	Thai	3,991		✓	Co-processing, Gasification	RDF, Biomass	• Transport • Separation • Wholesale	✓	✓	
2.	Insee Ecocycle Co.,Ltd.	Thai	1,734			Co-processing		• Transport • Recycling	✓	✓	
3.	Better World Green PCL	Thai	1,498	✓			SRF	• Transport • Separation		✓	
4.	Waste Management Siam Ltd.	Japanese, Thai	934	✓	✓			• Transport • Recycling	✓	✓	
5.	Pairojsompong Panitch Co.,Ltd.	Thai	640	✓		Anaerobic digestion	Landfill gas to energy	-	✓		
6.	Group 79 Co., Ltd.	Thai	566	✓				• Transport	✓		
7.	Akkhie Prakarn PCL	Thai	346		✓			• Transport		✓	✓
8.	Siam Power Co.,Ltd.	Thai	281		✓		RDF, Landfill gas to energy	-	✓		
9.	General Environmental Conservation PCL	Thai	278	✓		Fuel blending	SRF	• Transport		✓	
10.	Grow Green Environment Co.,Ltd.	Thai	151	✓	✓		SRF	• Transport • Recycling		✓	

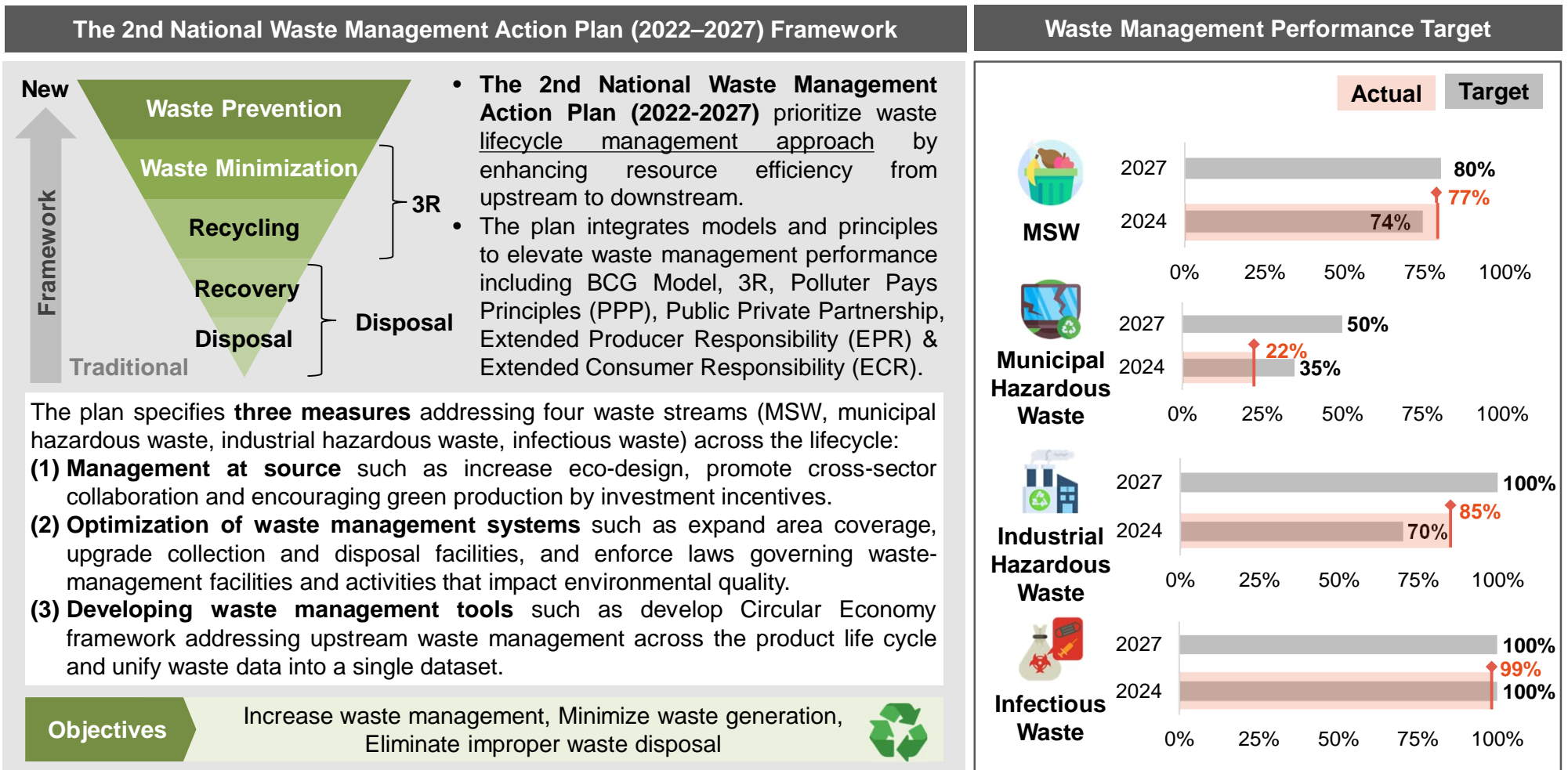
Note: \*Key players are companies registered with TSIC related to waste treatment and disposal that have websites and are listed by sales.

\*\*Municipal waste include municipal solid waste and municipal hazardous waste.

## V. Government Plan & Support: National Waste Management Plan

- The government has implemented several initiatives to enhance waste management systems in Thailand.
- The 2nd National Waste Management Action Plan (2022–2027) is the primary framework that modernizing waste management and transitioning toward a circular economy initiated by Pollution Control Department under the Ministry of Natural Resource and Environment.

### The 2nd National Waste Management Action Plan (2022–2027)



## V. Government Plan & Support: Investment Incentives for Waste Management Business

- The Thai government has promoted the waste-management sector by offering incentives to companies that are engaged in waste recycling and reuse, waste separation, RDF production, and waste treatment and disposal.
- Basic incentives include corporate income tax exemption, exemption of import duties and non-tax incentives.

### Investment Incentives for Waste Management Business: Basic Incentives

Activities	Activity Group	CIT Exemption*
<b>Waste Recycling and Reuse:</b>		
▪ Recycling and reuse of unwanted materials	A2	8 years
<b>Waste Sorting /Separation:</b>		
▪ Sorting/separation service of unwanted materials, which located in an industrial estate or promoted industrial zone	A3	5 years
▪ Sorting/separation service of unwanted materials	A4	3 years
<b>Waste Processing:</b>		
▪ Manufacture of refuse derived fuel (RDF)	A2	8 years
▪ Waste treatment or disposal	A2	8 years



**Exemption of import duties on machinery**



**Exemption of import duties on raw materials used in R&D**



**Exemption of import duties on raw materials used in production for export**



**Non-tax Incentives\*\***

\*Corporate Income Tax (CIT) exemption with a cap (A2-A4): This offers a corporate income tax exemption on profits from the prompted project, limited to 100% of the project's investment, as determined by the Board.

\*\*Non-tax incentives:

- (1) Permission to own land.
- (2) Permission to bring into the Kingdom skilled workers and experts to work in investment promoted activities.
- (3) Permission for foreign nationals to enter the Kingdom for the purpose of studying investment opportunities.
- (4) Permission to take out or remit money abroad in foreign currency.

## VI. Challenges and Opportunities

- Despite challenges such as limited resources, low source separation awareness, and data gaps, there are strong opportunities for both existing players and new entrants through investments in waste processing facilities, technology investments, and strategic partnerships.

### Challenges and Opportunities

#### Challenges

##### Insufficient Resources & Facilities



- MSW appropriate disposal sites and community drop-off points for hazardous items are limited.
- There are also labor shortage in waste collector and separator, especially for MSW and municipal hazardous waste.
- Industrial waste disposal facilities are heavily concentrated in the Central and Eastern regions.
- Infectious waste treatment and disposal facilities are insufficient and lack nationwide coverage.

##### Lack of Awareness towards Source Separation



- Waste generators still do not separate waste at the source, placing all in one bag, especially for municipal hazardous waste, which creates challenges for collection and separation facilities.
- Moreover, this also raises local government costs and increases the risk of contamination from hazardous or infectious waste.

##### Lack of Robust Regulations



- There are no mandatory source separation regulation for households in Thailand, and no penalties for improper separation.
- Regulations mandating producers or retailers to manage the full lifecycle of their products have not been officially enacted.

##### Fragmentation of Waste Data



- Since each waste type is regulated by different government agencies, waste data are spread across several ministries, causing difficulties in coordinating overall waste management.

#### Opportunities

##### Investments

- Invest in improving waste processing facilities including recycling, treatment and disposal sites to enhance efficiency
- Expand waste processing facilities in boarder area
- Invest in automated sorting robots and AI-driven sensors to improve sorting efficiency
- Invest in waste collection and separation to enhance recycling.
- Deploy a centralized system consolidating all waste data and apply analytics to optimize operations.
- Implement recycling program to enhance source separation.

##### Strategic Partnerships

- Partner with hospitals to provide treatment and disposal services
- Collaborate with logistics firms for waste transport solutions
- Partner with packaging company to provide eco-design and green production solution
- Partner with tech company to develop or enhance centralized waste trading platform

## Appendix: TSIC of Waste Management Business Players and Description

- Thailand's waste management business can be divided into 4 main categories according to TSIC group, including (1) waste collection & transportation, (2) wholesale of waste, (3) waste recycling and (4) waste treatment & disposal.

### TSIC for Players

Major Categories	TSIC	Description
<b>Waste collection &amp; transportation</b>	38110	Collection of non-hazardous waste from household, commercial and industrial.
	38120	Collection of hazardous waste from hospital and manufacturer.
<b>Wholesale of waste, scraps and materials for recycling</b>	46695	Wholesale of waste and scrap and materials for recycling which include disassembling of unused products such as car, computer and television.
<b>Waste recycling</b>	38300	Material recovery including separation for recycling, reassembling of electrical and electronic waste, cutting, crushing or compressing of waste.
<b>Waste treatment &amp; disposal</b>	38211	Treatment and disposal of non-hazardous waste by a proper sanitary landfill.
	38212	Treatment and disposal of non-hazardous waste by a proper incineration excluding open dump.
	38213	Treatment and disposal of non-hazardous waste by a proper biological reduction.
	38219	Treatment and disposal of non-hazardous waste by other non-hazardous treatments such as open dump, open burning and other non-hazardous treatments that is not classified elsewhere
	38221	Treatment, transport and disposal of radioactive nuclear waste generated from hospital.
	38222	Treatment and disposal of hazardous waste both solid and non-solid by other treatments for such as flammable liquid, infectious waste and other hazardous waste.

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