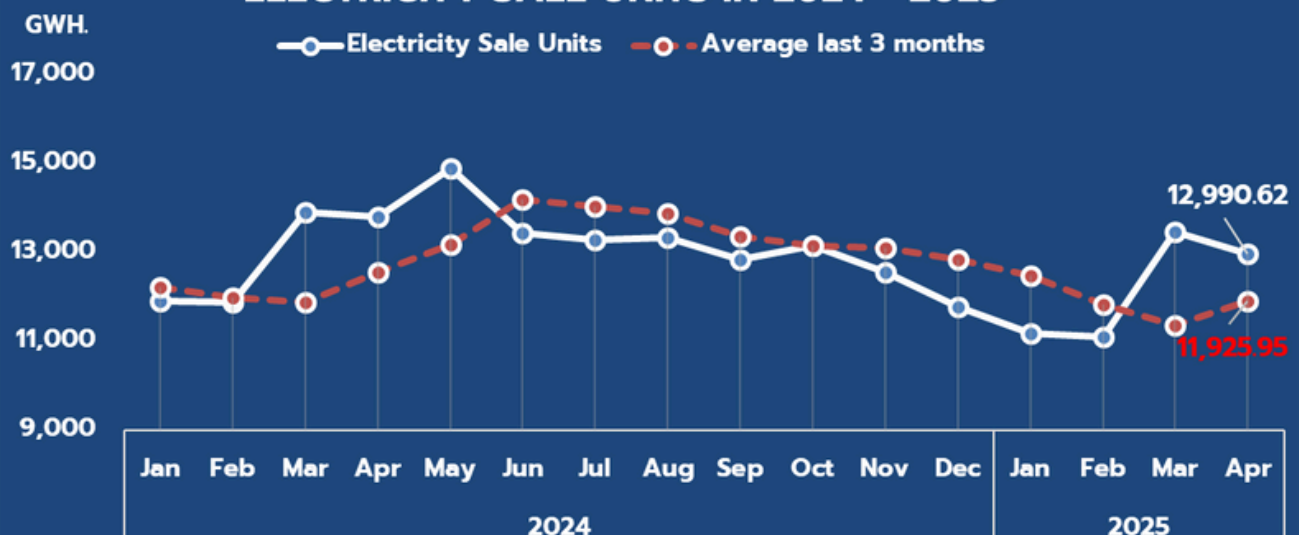


THE ELECTRICITY SALES REPORT OF PEA

APRIL 2025

"Smart Energy for Better Life and Sustainability"

ELECTRICITY SALE UNITS IN 2024 - 2025

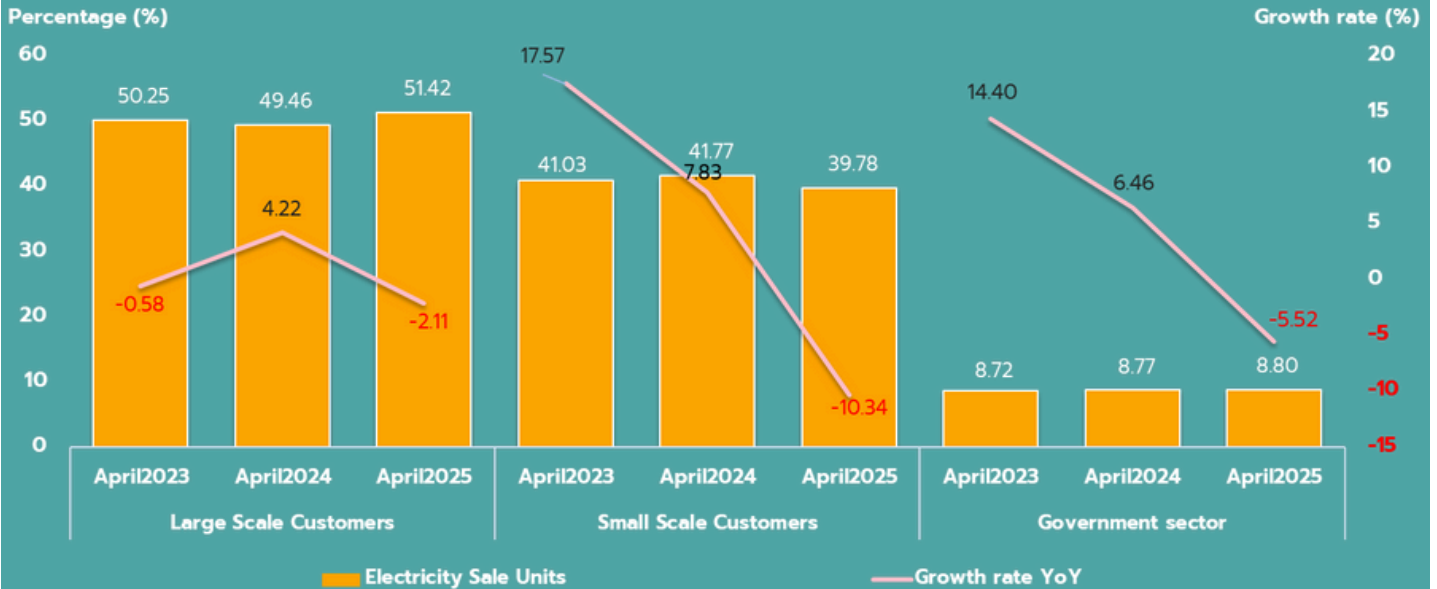


ELECTRICITY SALE UNITS
INCREASED AT

-5.85%
YOY

Electricity sales units decreased as a result of a drop in household usage due to higher precipitation, caused by the lower average temperature. The decline in industrial consumption was affected by price competitiveness with Chinese goods and the uncertainty of the global economy. During the high household debt, private consumption still affected.

ELECTRICITY SALE UNITS: PERCENTAGE OF CUSTOMERS GROUP IN APRIL



LARGE SCALE CUSTOMER

-2.11%
YoY

The Industrial sector dropped by 1.16% YoY because the global economy was struggling, especially in China, the U.S.A., and Europe, there was also uncertainty about the U.S. imported tariff and price competitiveness with China, which was the lower cost.

Large-scale commercial customers decreased by 4.89% YoY Chinese tourists significantly declined during the Song Kran festival because of their economic situation. Besides, there were the Baht appreciation and the earthquake, which affected travel cost and safety confidence, causing the department stores to lose purchasing power from local and international tourists.

SMALL SCALE CUSTOMERS

-10.34%
YoY

The residential sector decreased by 11.45% YoY owing to the thunderstorm and rainy weather, causing the average temperature to fall, the household's electrical consumption was reduced by these causes, and the high living cost and debt problems.

Small-scale commercial customers reduced by 6.70% YoY from a fall in domestic consumption due to the cost of living and debt concerns, while the Chinese cheap goods were famous, affecting the competitiveness of domestic retailers.

GOVERNMENT SECTOR

-5.52%
YoY

Because of a lower average temperature and the higher average precipitation, this caused government offices, such as administrative offices, to drop electricity consumption.



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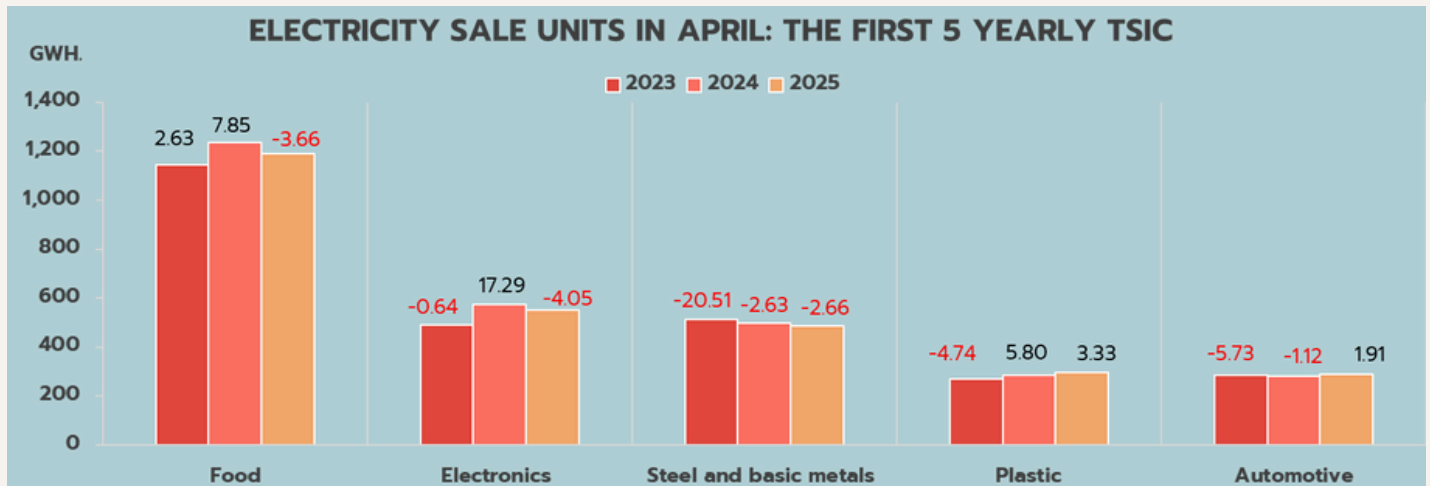


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Manufacturing Sector -1.67%_{YoY}



-3.66% YoY	Food	The ice production decreased following its lower demand from lower temperatures, while the tapioca export to China fell because Chinese producers used corn starch, which was cheaper, instead. In addition, the demand for processed food declined because consumers were less concerned about the international conflict between Russia and Ukraine.
-4.05% YoY	Electronic	The fall in the production of machines and electrical appliances due to the recession of the domestic industrial sector and a drop in demand from the U.S.A., affected by a slowdown in construction to a drop in the demand for electric motors, water pumps, and control equipment.
-2.66% YoY	Steel & basic metals	The decline in domestic demand, severe price competitiveness with China, and the drop in domestic production because of the unclear imported tariff in the U.S.A. will affect trade in the long term.
3.33% YoY	Plastic	There was a higher demand for containers for food and e-commerce in the U.S.A., and a high demand for EV parts. The producers accelerate the production to increase inventory after the drop in cost following the oil and naphtha price. Because Opec increased production capacity.
1.91% YoY	Automotive	The parts and equipment of cars increased because of the producers' change to produce parts instead of assembling cars, following the market demand. Motorcycle production also rose by a lower base in the previous year, following supportive factors such as food transportation and transportation applications.

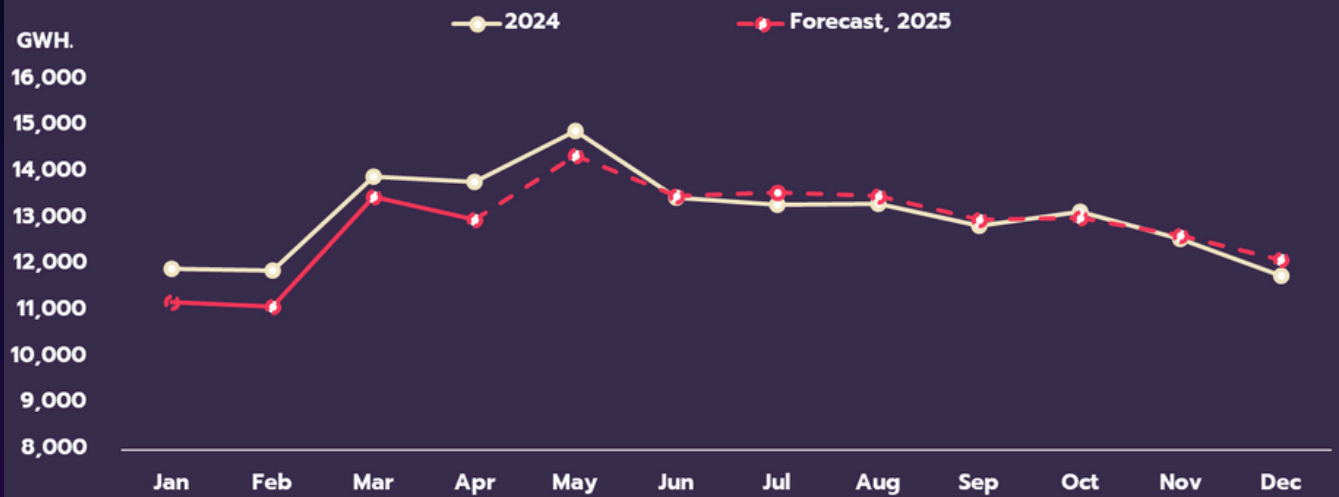
Sale and Hotel sector

-6.26%
YoY

Chinese tourists significantly decreased because of their economic recession. Malaysian tourists also dropped because of the unsafe in 3 provinces in the south. Furthermore, other countries in the region, like Japan and Vietnam, are more attractive to tourists by promoting their new places to visit, safety, and more comfortable transportation. Moreover, domestic tourism is affected by the high debt and cost of living, causing businesses relying on tourism to drop their income.



ELECTRICITY SALE UNITS A YEAR IN 2024 AND 2025 FORECAST



-1.52% YoY

PEA has forecasted the electricity sales units in 2025 to decline by 1.52% YoY since the drop in exports following the global economic recession. The industrial sector was pressured by the cheaper Chinese goods and the fluctuation of the U.S. import tariff. Furthermore, there were household debts and strict loan requirements. While there were supportive measures in tourism and services, they would stimulate private investment and consumption.

Positive Factors

1. There was an acceleration in budget disbursement in 2025, particularly in investment.
2. Infrastructure investments for transportation are on an upward trend to increase competitiveness and economic growth, such as the Southern Railway and the high-speed train between Thailand and China (Phase 1; Bangkok to Nakhon Ratchasima).
3. BOI launched a campaign to support foreign direct investment in high-potential industries such as digital, electronics, and automotive, to enhance competitiveness by driving with advanced technology.
4. There were driving factors for exporting to sign the FTAs with other countries, such as EFTA, EU, and the U.S.A., to expand the market and increase competitiveness.
5. Private consumption tends to increase by stimulating measures such as the Easy E-Receipt project, Digital Wallet, Thailand travel fair, and public housing project.
6. The Amazing Thailand Grand Tourism and Sport Year 2025 stimulates the economy through tourism and hosting international sports competitions, like the 33rd SEA Games, FIVB Women's World Championship 2025, and the ASEAN Para Games 2026, which can attract foreigners and distribute income to regions.
7. Long-haul tourism significantly grows, especially from Europe, the U.S.A., and the Middle East, because of the strategies that focus on high-value travelers.

Negative Factors

1. U.S. taxation policies call for 36% of imported taxes from Thailand. If this policy is effective, it will severely affect Thai exports.
2. The oversupply of Chinese goods in the ASEAN market was caused by trade barriers between the U.S.A. and China and the Chinese economic recession. China exported its goods to Thailand and ASEAN markets, causing industrial competition in price with Chinese goods for domestic and export markets.
3. The Geopolitical, Russia-Ukraine, affects to global supply chain, higher logistics costs, and a lack of raw materials, which causes higher prices and less planning accuracy.
4. The structural problem in the tourism industry, which relies on Chinese tourists, is the risk of being affected by the Chinese economic recession and the safety image, such as a scam center on the Thailand-Myanmar border and a severe earthquake that affects their confidence.
5. Other countries in the region, like Japan, South Korea, Vietnam, and Malaysia, have launched an approach strategy to attract Chinese travelers in the way of efficient and comfortable transportation. Moreover, some countries have a lower cost of living than Thailand.
6. Household and business debt remains high because of the restricted loans and the drop in loan growth, affecting private consumption.

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