



**Bangkok Dusit Medical Services (BDMS)**  
**Investor Presentation 3Q18 & 9M18 Results**  
**November 2018**



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- Operational Statistics & Financial Highlights
- Healthcare Industry

# Overview

## Overview



46 Hospitals



~ 8,000 Beds



10 Centers of Excellence



BDMS Wellness Clinic



12,000+ Doctors  
8,000+ Nurses  
14,000+ Staffs



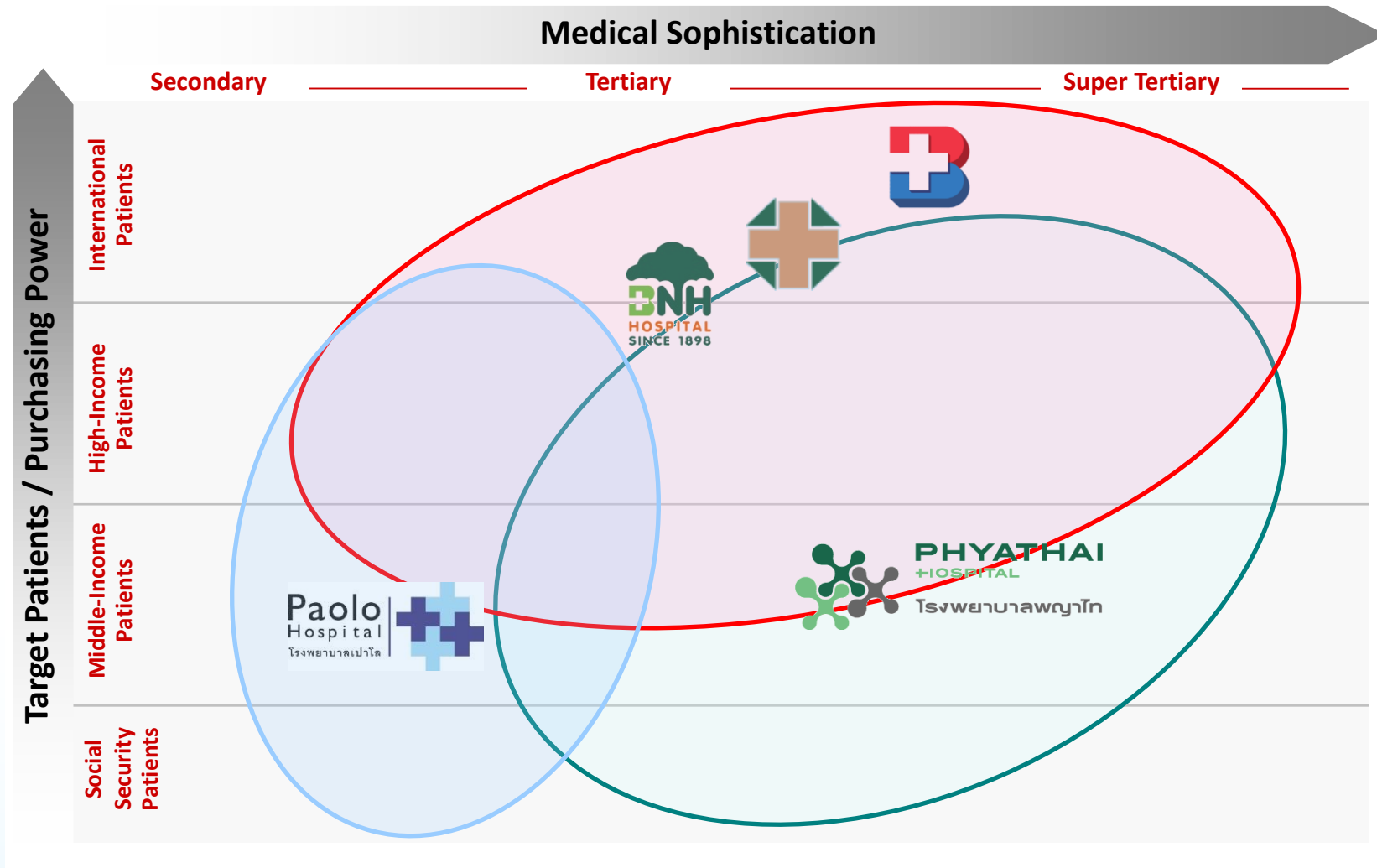
Pharmaceutical manufacturer and drug stores

- Established on February 26, 1972
- Top 5 private hospital operators in the world by market capitalization
- Hub-and-Spoke model with an established patient referral system helps create efficiency through scale

	Brand	No. of Hospitals	No. of Beds*
	Bangkok Hospital	21	3,602
	Samitivej Hospital	6	1,288
	Phyathai Hospital	5	1,241
	Paolo Hospital	6	1,008
	BNH Hospital	1	144
	Royal Hospital	2	130
	Local Hospital	5	598

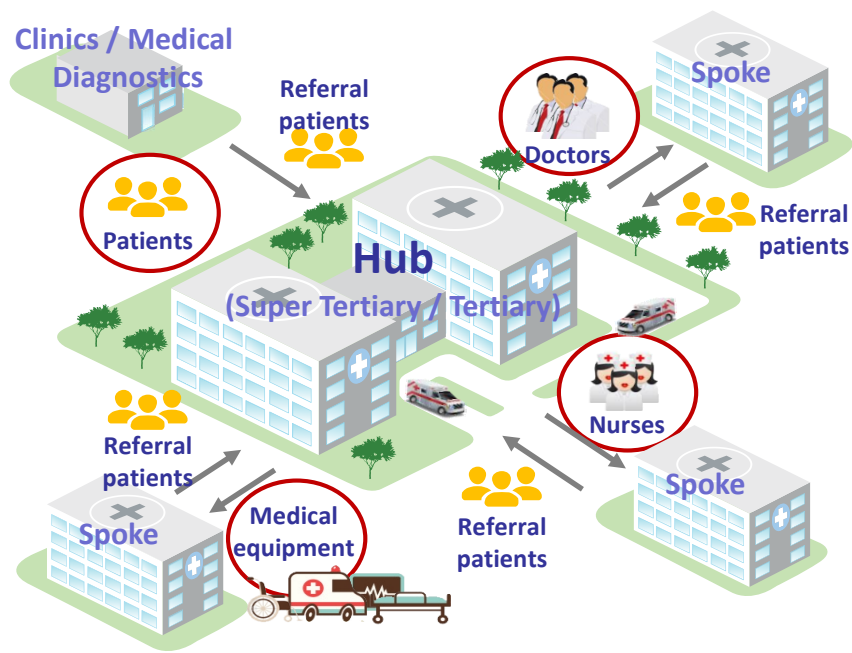
\* Maximum number of beds according to structure of the hospitals

# Diversification of Patient Mix



# 'Hub-and-Spoke' Model

Providing a Proven Patient Referral System and Creating Efficiency Through Scale



- 1 Strong patient referral system within and across each hub and spoke
- 2 Enhances synergies and benefits of scale among hospitals within the group
- 3 Shared supporting services among multiple hubs which enhance efficiency and competitiveness
- 4 Established system provides a platform for future expansion

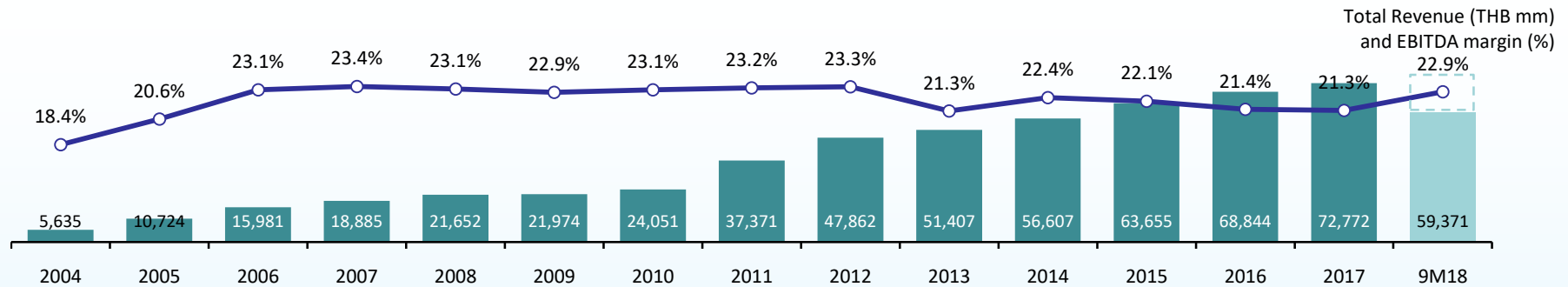
# Successful Track Record of Expansion Through M&A and Greenfield Projects

## Strong Share Price Performance Backed by a Successful Expansion Track Record



\* Transfer of business to our new facility, Royal Phnom Penh

## Solid Revenue Growth Over the Past Decade (2004-2017 CAGR of 21.7%) with Resilient EBITDA margin



Source: Derived from BDMS' financial statements

BDMS has developed 14 new hospitals and acquired a total of 30 hospitals to date



# BDMS Future Plan

## Key Strategies

	2017	2018	2019	2020-2021
Hospitals in Pipeline	<ul style="list-style-type: none"> <li>45 Hospitals</li> </ul>	<ul style="list-style-type: none"> <li>46 Hospitals</li> </ul>		<ul style="list-style-type: none"> <li>~ 50 hospitals</li> </ul>
	<ul style="list-style-type: none"> <li>~ 8,000 beds</li> </ul>			<ul style="list-style-type: none"> <li>~ 8,500 beds</li> </ul>
	<ul style="list-style-type: none"> <li>✓ Paolo Kaset (162 beds)</li> <li>✓ Bangkok Surat (150 beds)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Chiva Transitional Care (52 beds)</li> <li>○ Bangkok Chiangrai (80 beds)</li> </ul>	<ul style="list-style-type: none"> <li>○ Bangkok International (175 beds)</li> </ul>	<ul style="list-style-type: none"> <li>○ Jomtien Hospital (233 beds)</li> <li>○ Expansion at BHQ (100 beds)</li> </ul>
	<ul style="list-style-type: none"> <li>✓ BDMS Wellness Clinic: 1 Clinic</li> </ul>	<ul style="list-style-type: none"> <li>✓ BDMS Wellness Clinic: 7 Clinics</li> </ul>	<ul style="list-style-type: none"> <li>○ Mövenpick BDMS Wellness Resort Bangkok</li> </ul>	
Focus on Margin Expansion	<ul style="list-style-type: none"> <li>■ Increase utilization of ramping-up hospitals</li> <li>■ Improving operational efficiencies</li> <li>■ Centers of excellence</li> <li>■ International medical affiliation</li> </ul>			
Long-term Target	<ul style="list-style-type: none"> <li>■ Completed continuum of healthcare</li> <li>■ Top referral hospitals in Asia Pacific</li> <li>■ Long-term EBITDA margin target of ~ 25%</li> </ul>			

# BDMS Complete Continuum of Healthcare



## Centers of Excellence



Super Tertiary Care

Tertiary Care

Secondary Care

Promotive

Preventive

Early  
Detection

Curative

Transitional

Rehabilitative



BDMS Wellness Clinic



Bangkok International



Chiva Transitional Care Hospital

## Non-Hospital Strategic Investment



Sterile Drug Manufacturer & Distributor



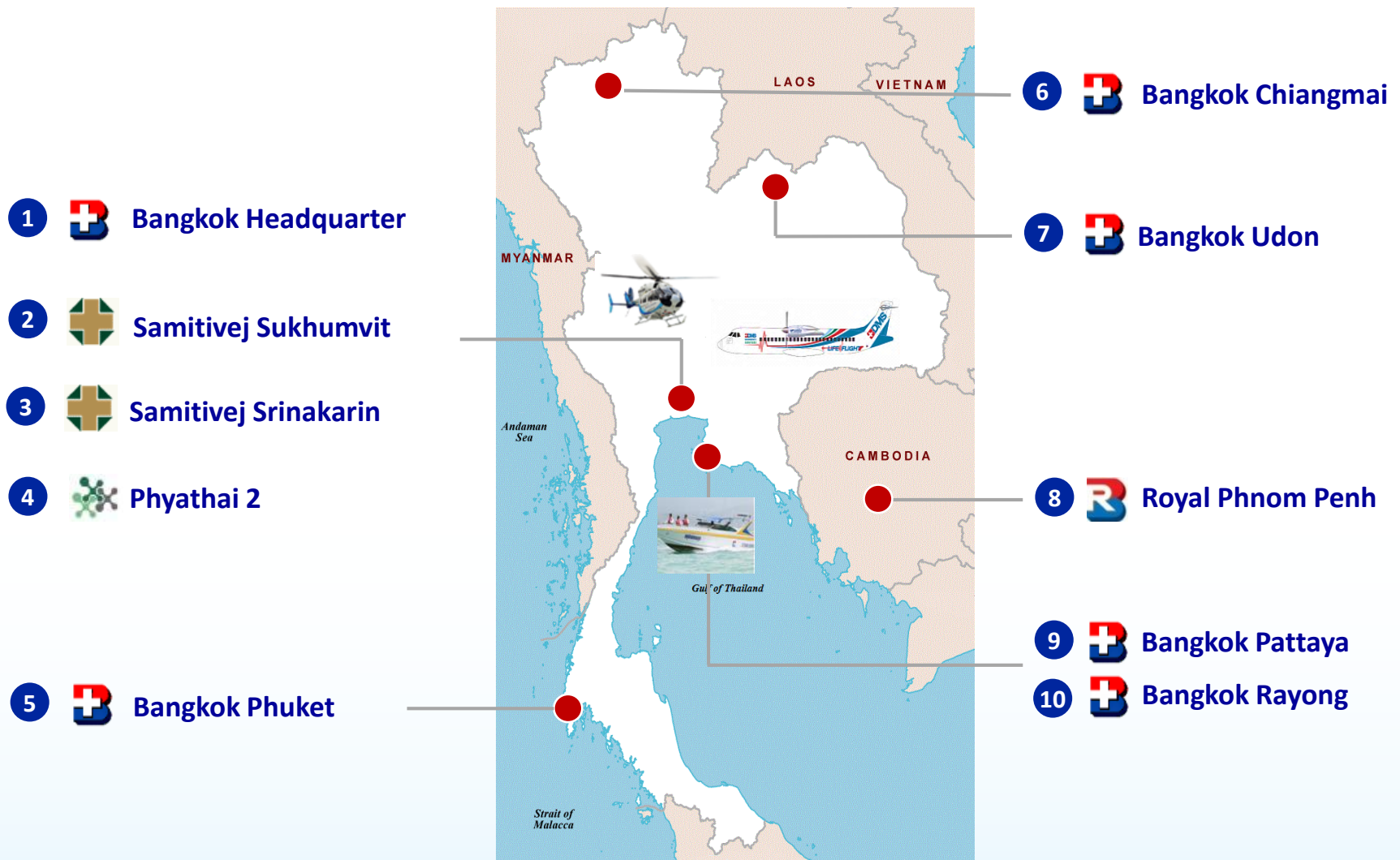
Generic Drug Manufacturer



Drug Store

# BDMS Centers of Excellence Network

Upgrading Existing 10 Hospitals to Become Centers of Excellence with the Focus on International Patients



# BDMS Network Capabilities

## Alarm Center: One Number All Access For Life Care



- One number access to entire BDMS network  
 **Thailand Domestic Calls 1724**  
**International Calls +66-2-BANGKOK, +66-2-226-4565**



- Dedicated multilingual emergency team  




- Complete range of emergency transportation available



## State-of-the-Art Medical Equipment



**New Radiation Machine: Varian EDGE**

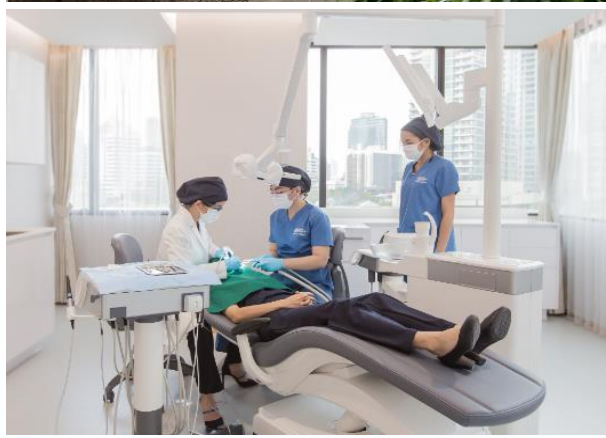


**PET/CT Scan with Flow Motion**



# BDMS Wellness Clinic

## A Brand New Wellness Clinic Delivering World-Class Services



### 7 Centers of Preventive Excellence

1

Regenerative Clinic

2

Musculoskeletal and Sports Clinic

3

Cardioscience Clinic

4

Neuroscience Clinic

5

Digestive Wellness Clinic

6

Fertility Clinic

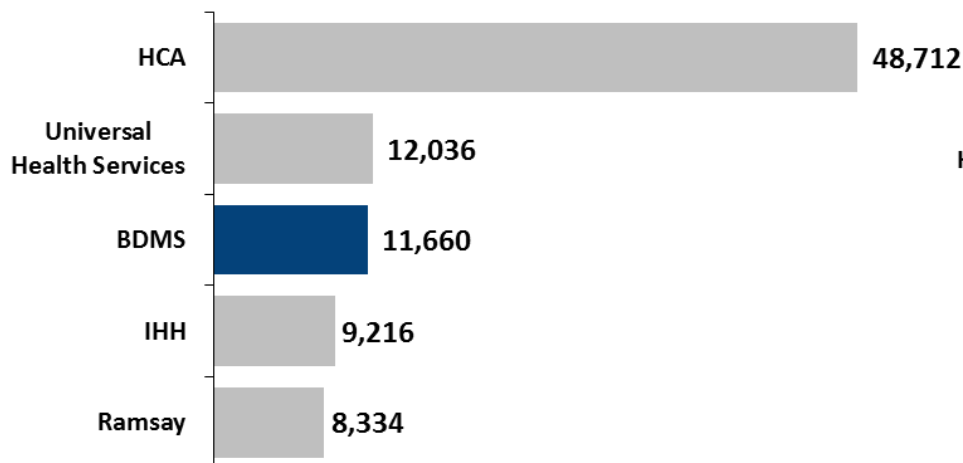
7

Dental Clinic

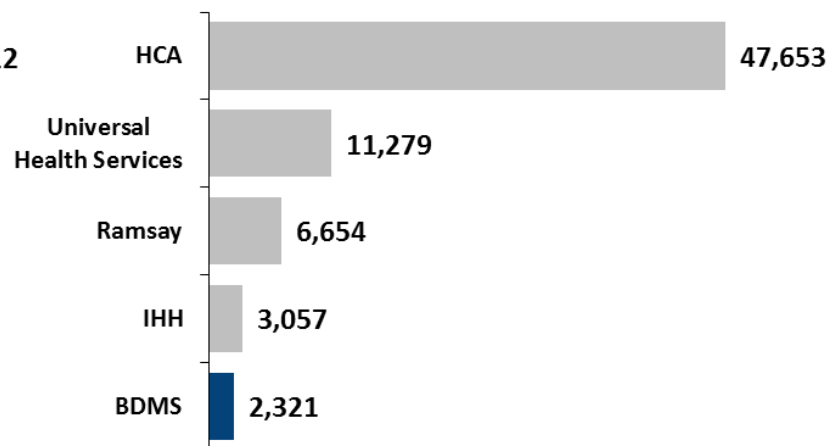
- BDMS Wellness Clinic signed hotel management contract with Mövenpick Hotels & Resorts in managing “Mövenpick BDMS Wellness Resort Bangkok” which is expected to open in 2019
- An international wellness resort with around 290 guest rooms located in the heart of Bangkok in coordination with BDMS Wellness Clinic which is located nearby to provide in-house personalized wellness program and promote prevention and lifestyle improvement

# Global Hospital Rankings

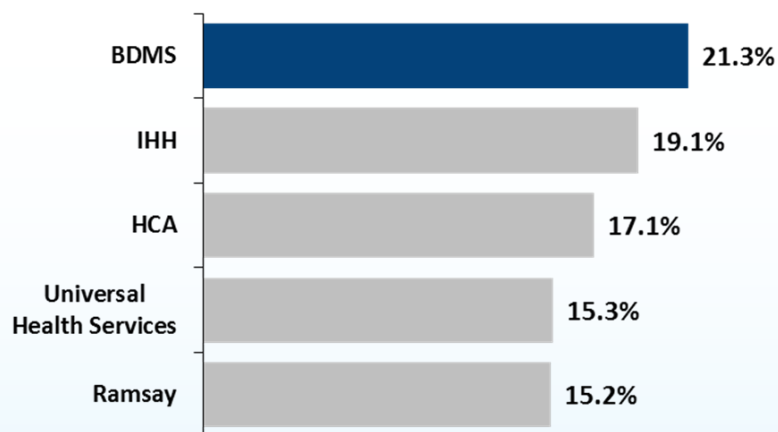
## Market Capitalization (USD mm)



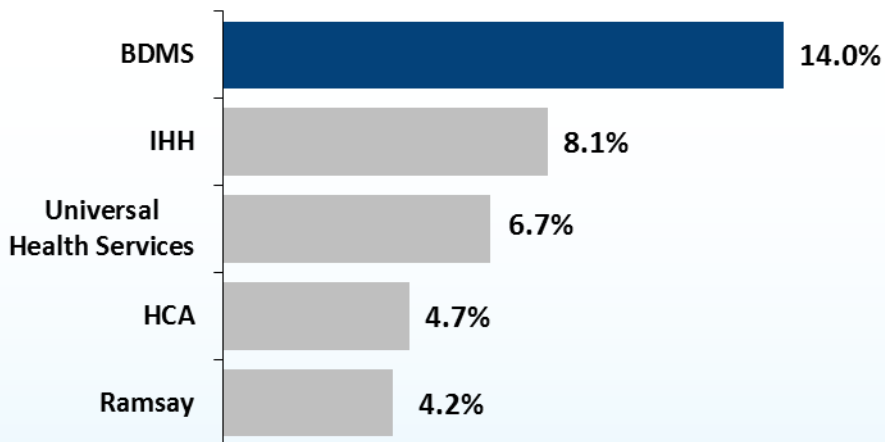
## Revenue (USD mm)



## EBITDA Margin



## Net Profit Margin



Remark: - Market capitalization as of 13 November 2018

- Financial performance for year ended December 2017 except Ramsay for the year ended June 2018

# Strategic Focus on Health Insurance

My First Class Healthcare @ BDMS by Allianz Ayudhya : Exclusive Health Insurance at BDMS Network with High Coverage at THB 100 Million per Year



## 1st Class for you by World Class Health Care Service & World Class Health Protection



วงเงินสูงสุดถึง 100 ล้านบาทต่อปี  
ให้ความคุ้มครองสุขภาพ ในโรงพยาบาลเครือข่าย BDMS  
กว่า 45 โรงพยาบาลทั่วประเทศและทั่วมุมโลก



ครอบคลุมทุกการรักษาพยาบาล  
ทั้งผู้ป่วยใน ผู้ป่วยนอก  
ทันตกรรม คลอดบุตร และสาายตา



ค่าตรวจสุขภาพ  
สูงสุดถึง 20,000 บาท/ปี  
สัญญาต้องปีผลบังคับต่อเนื่องมากกว่า 12 เดือน



บริการดูแลคุณตลอดการเจ็บป่วย  
การบริการดูแลคุณยามพักฟื้นที่บ้าน (Nursing care)



สิทธิประโยชน์เหนือระดับสำหรับลูกค้า HEALTH PRESTIGE  
ของบวญวันเกิดสุดพิเศษ และโทรศัพท์หมายเลขพิเศษสำหรับให้บริการด้านกรรมธรรม์ของคุณ

# BDMS & Ping An Good Doctor (PAGD) Announced Strategic Cooperation

Signing MOU on November 15, 2018



- To increase number of Chinese patients to BDMS by
  - Integrating and exchanging experienced medical resources online and offline for PAGD 228 million members with monthly active users of 48.6 million
  - Enhancing BDMS patient referral
  - Offering BDMS elective packages to PAGD members



**3Q18 & 9M18 in review**

# Consolidated Financial Summary

## 3Q18 & 9M18 Results

	3Q18		9M18	
	Chg (yoy)	% to Revenue	Chg (yoy)	% to Revenue
Operating income	+6%	(THB 20,614 mm)	+10%	(THB 59,371 mm)
Patient revenue	+6%	(THB 19,621 mm)	+10%	(THB 56,477 mm)
<b>Breakdown by location</b>				
▪ Bangkok & Vicinity	+4%	59%	+8%	58%
▪ Upcountry	+7%	41%	+13%	42%
<b>Breakdown by nationality</b>				
▪ Thai	+6%	74%	+10%	72%
▪ International	+4%	26%	+9%	28%
<b>Breakdown by type of patients</b>				
▪ Outpatients	+6%	46%	+8%	46%
▪ Inpatients	+5%	54%	+11%	54%

# Consolidated Financial Summary

## 3Q18 & 9M18 Profitability Ratio

(THB mm)	3Q18	3Q17	Chg (yoy)	9M18	9M17	Chg (yoy)
EBITDA	4,820	4,422	+9%	13,612	11,579	+18%
EBITDA margin	23.4%	22.7%		22.9%	21.4%	
Core profit	2,879	2,417	+19%	7,841	5,986	+31%
Core profit margin	14.0%	12.4%		13.2%	11.1%	
Net profit	2,879	2,417	+19%	7,841	8,181*	(4)%
Net profit	14.0%	12.4%		13.2%	15.1%	

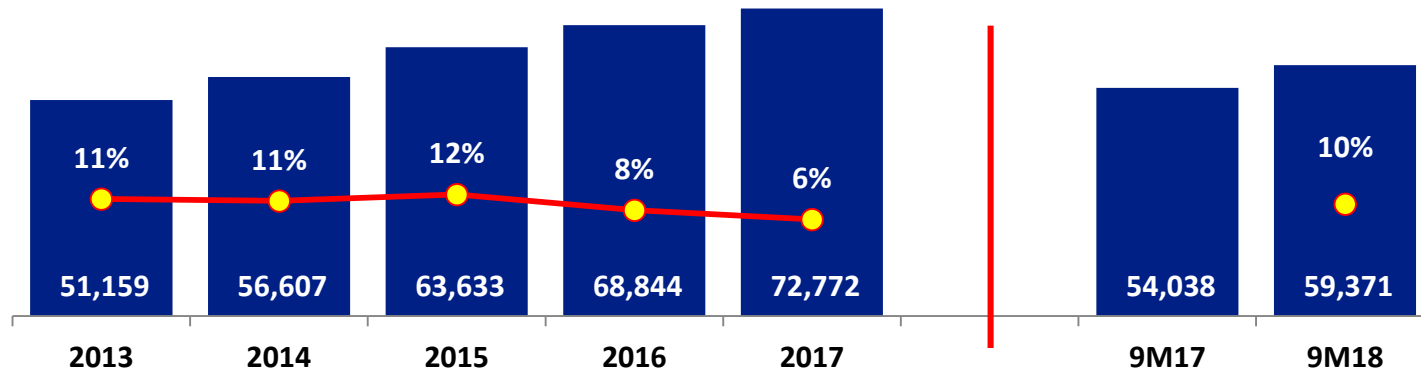
\* Including extra gain of THB 2,195 million (net of taxes) on partial sale of investment in Bumrungrad Hospital Public Co., Ltd. (BH)

## **Operational Statistics & Financial Highlights**

# Operating Income Growth

## Operating Income Trend

(THB mm)



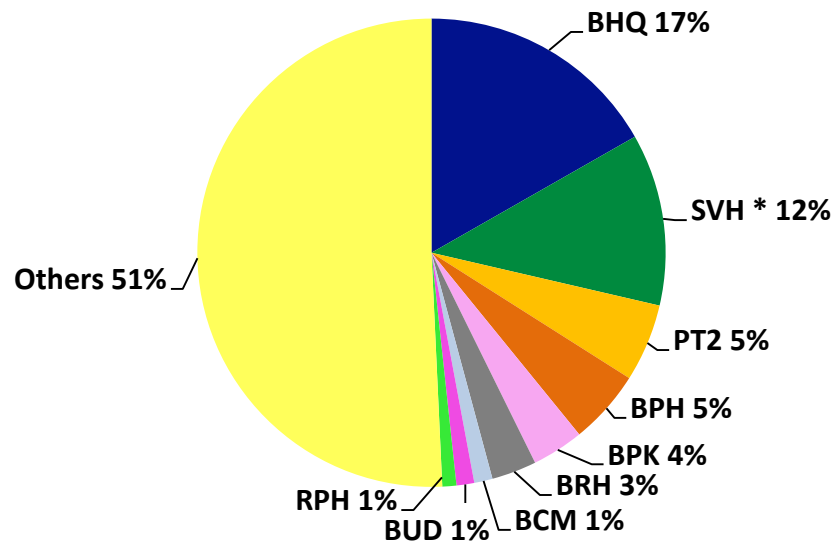
## Commentary

- 9M18 Operating income increased by 10% yoy mainly from
  - Patient revenue increased 10% yoy, attributed to
    - Higher volume and price intensity from Center of Excellence
    - Expansion of insurance patients base
    - Increasing in influenza and outbreak during 1Q18
  - Revenue from sales of goods grew 10% yoy from increase in sales of The Medicpharma, A.N.B. Laboratories

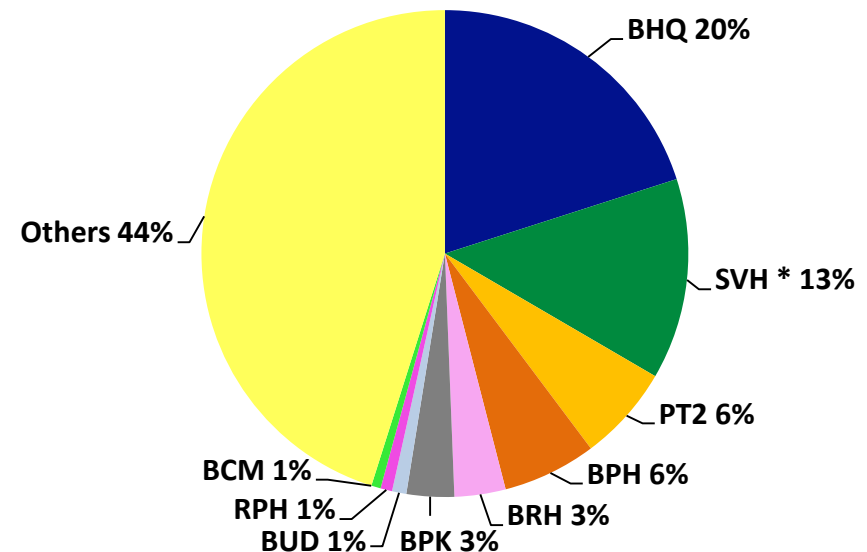
Remark:- Operating income is calculated from hospital revenue + revenue from sales of goods + other income

# Diversified Sources of Revenues and Profitability

CoE Operating Income Contribution in 9M18



CoE Total EBITDA Contribution in 9M18



## Commentary

- In 9M18, 10 Centers of Excellence (CoE) contributed 49% of total revenues and 56% of total EBITDA
- The remaining 35 hospitals contributed 51% of total revenues and 44% of total EBITDA
- Key hospitals that drive revenue growth were SCH (+40%), BKN (+32%), RPH (+30%), BCM (+28%), BSN (+21%), PT3 (+13%) and SSH (+12%)

\* SVH also included SNH performance

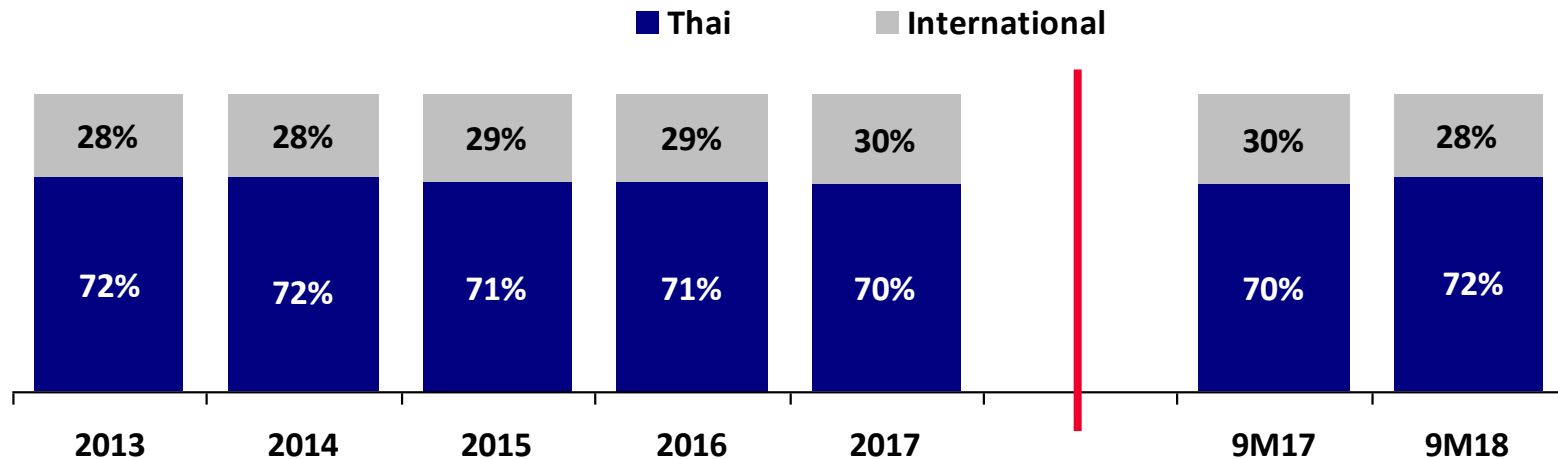
Remark: - Operating income is calculated from hospital revenue + revenue from sales of goods and food + other income

- EBITDA is calculated from revenue from hospital operations + revenue from F&B + other income – cost from hospital operations – SG&A expenses

- Hospital abbreviation shown on Appendix

# Thai and International Patients

## Revenue Contribution by Nationality

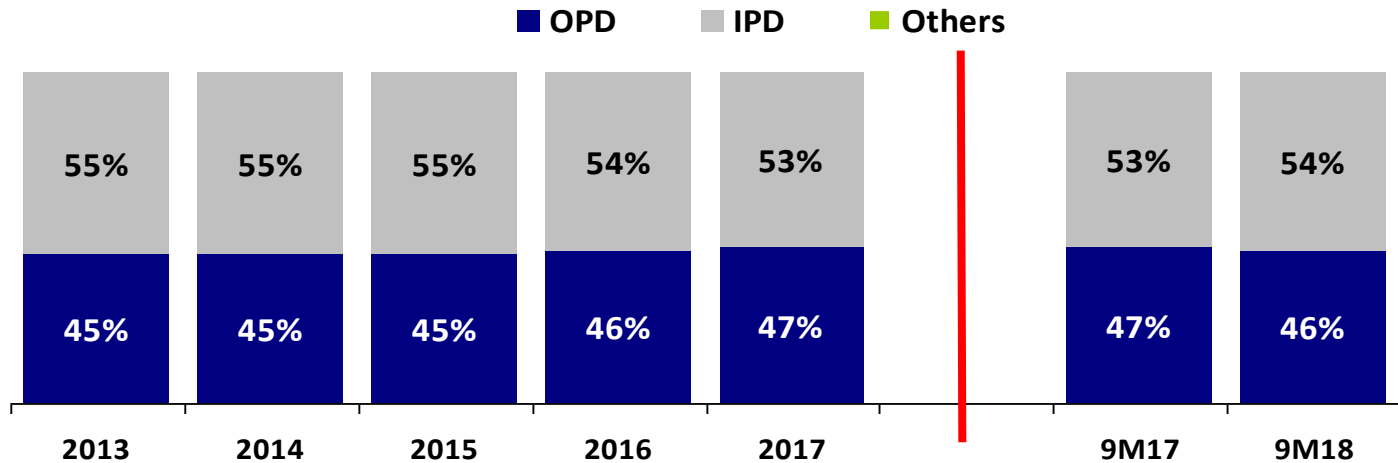


## Commentary

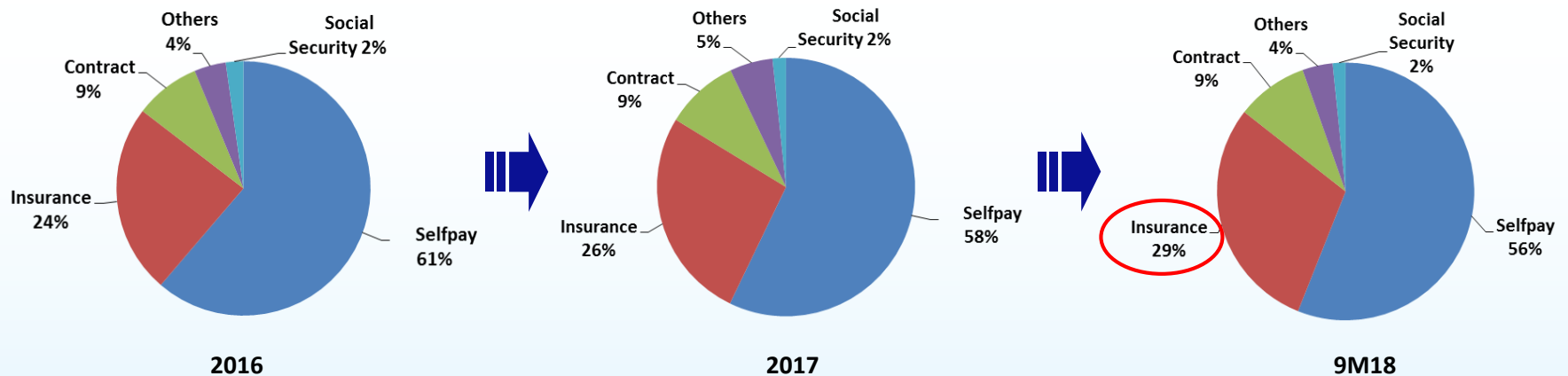
- 9M18 revenues from Thai patients grew 10% yoy while international patients grew 9% yoy
  - Top 5 international patient revenues are from Japan, China, Cambodia, Myanmar and USA which contribute 2.1%, 1.7%, 1.6%, 1.6% and 1.5% of total patient revenues respectively
  - Key growth for International patient revenues are Kuwait (+48%), Cambodia (+22%) and China (+22% yoy)

# Patient Mix

## Revenue Breakdown by Patient Types



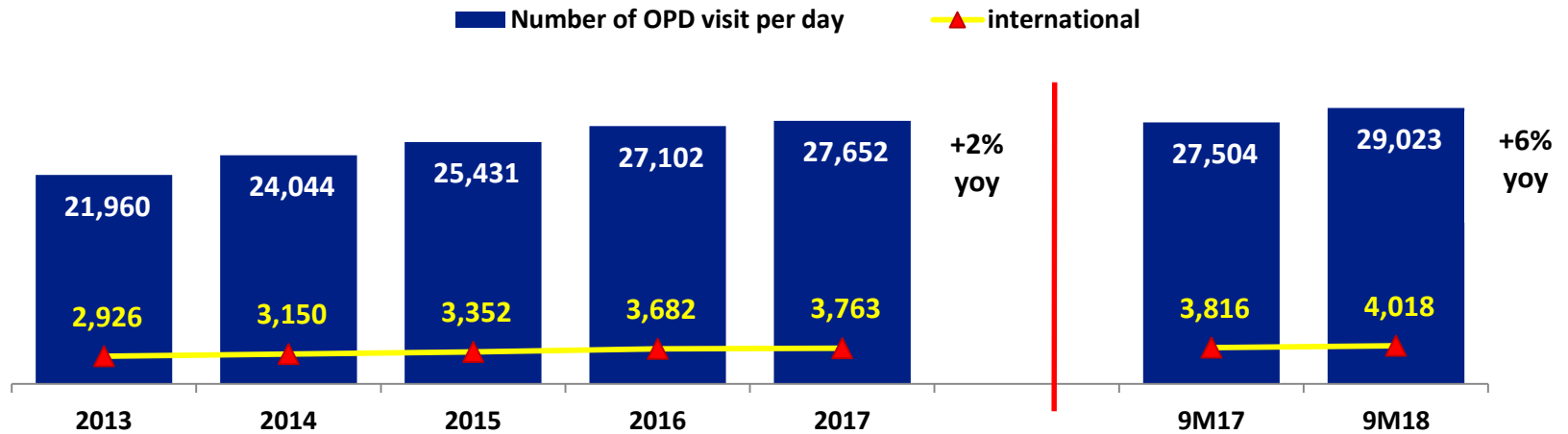
## Patient Revenue by Payor: Increasing Insurance Portion



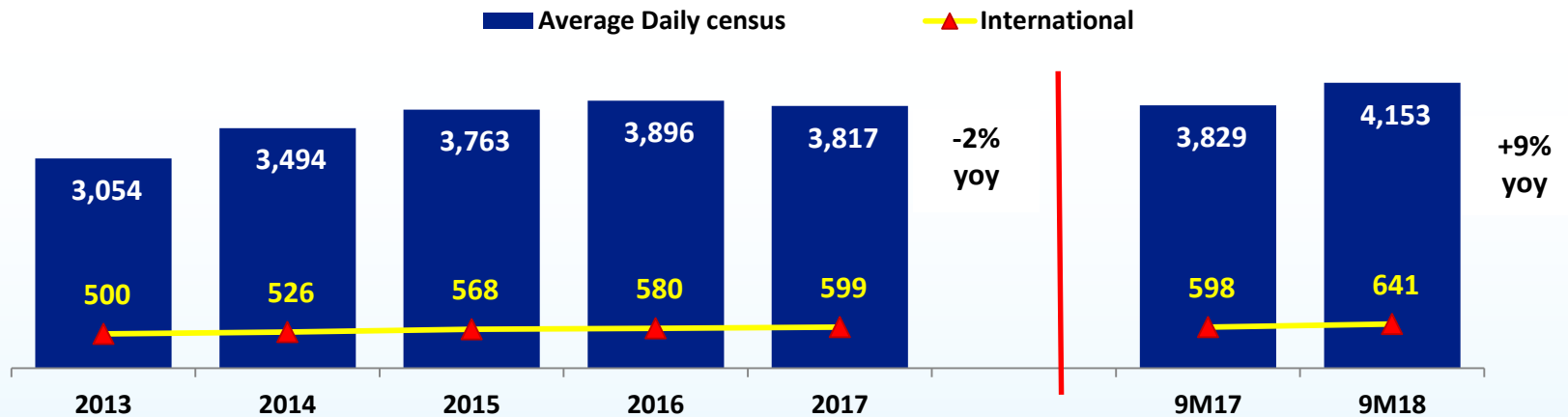


# Patient Volume

## Number of OPD Visits per Day



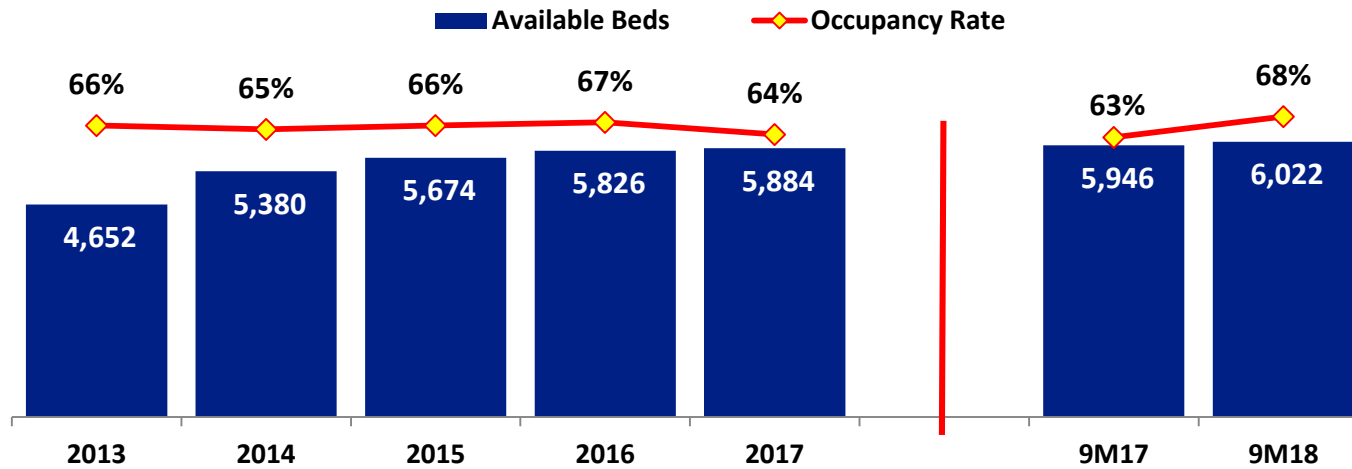
## Average Daily Census ( ADC )



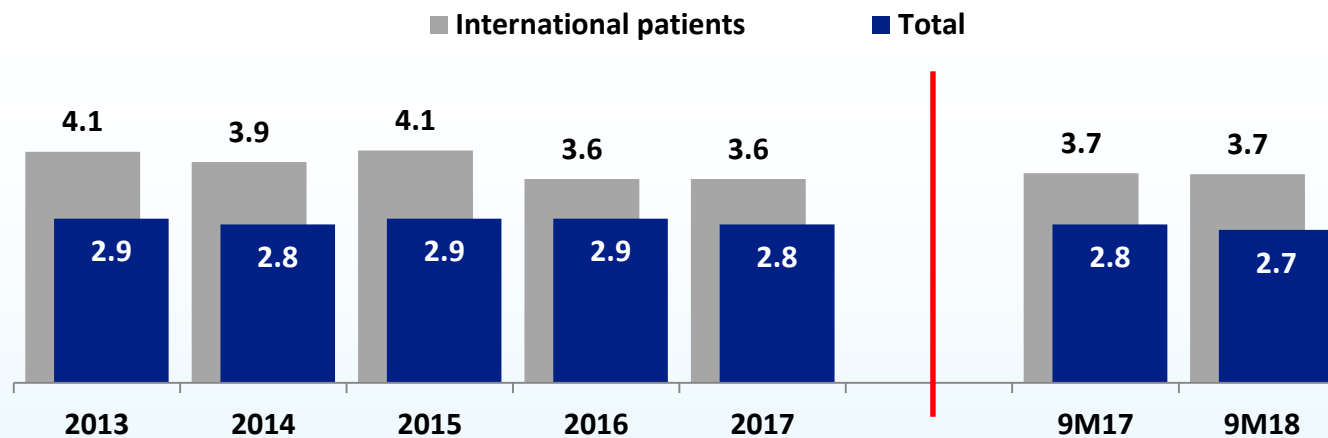
Remarks: - Including social security

# Utilization of Beds

## Occupancy Rate Based on Available Beds



## Average Length of Stay (days)

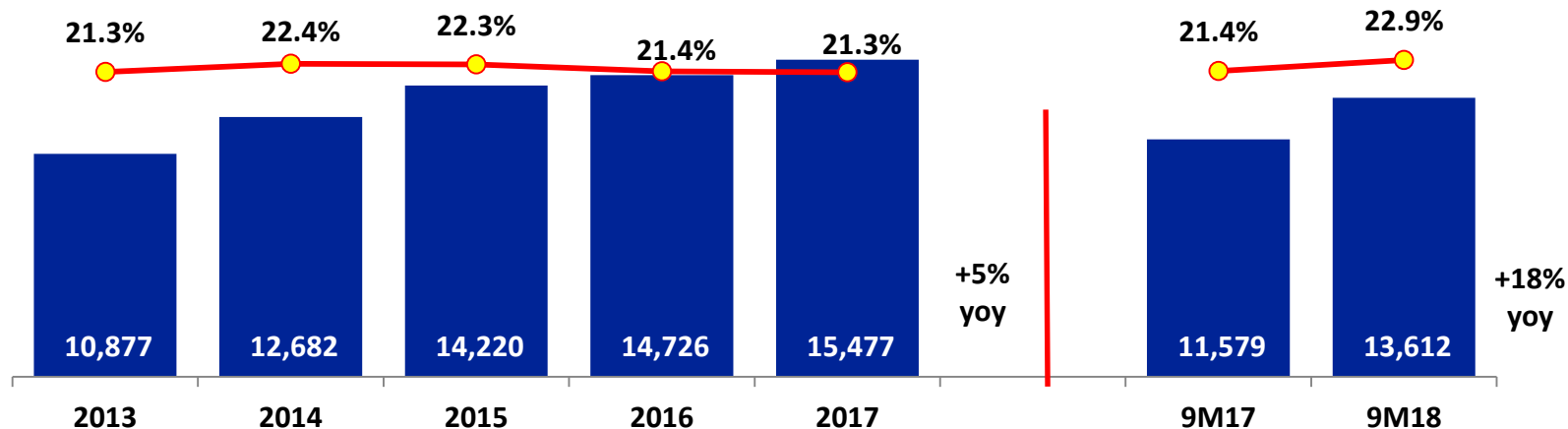


Remarks:- Including social security patients

# Profitability Trend

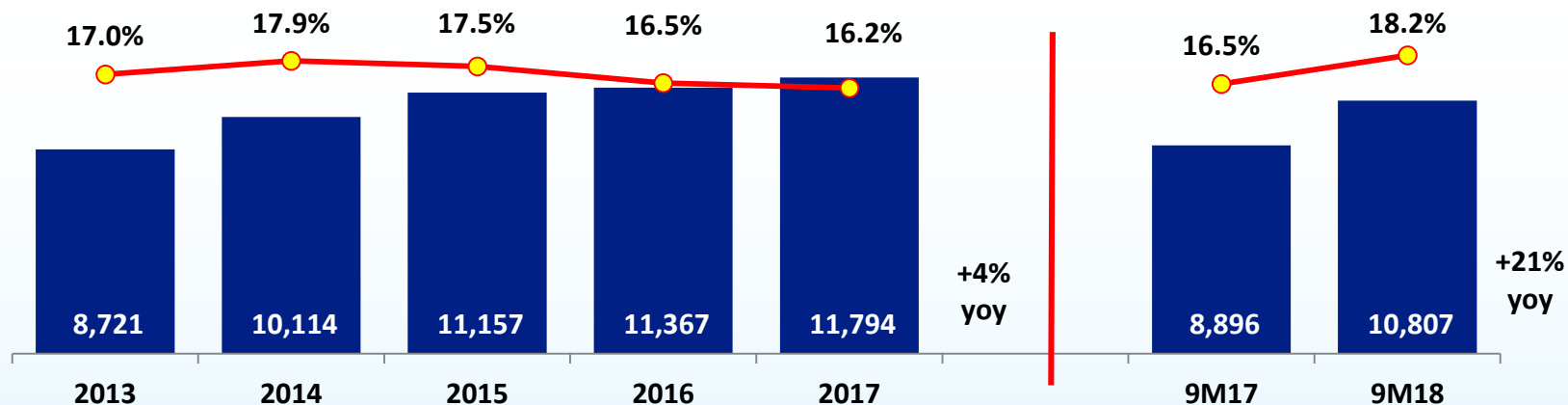
## EBITDA & EBITDA Margin

(THB mm)



## EBIT & EBIT Margin \*

(THB mm)

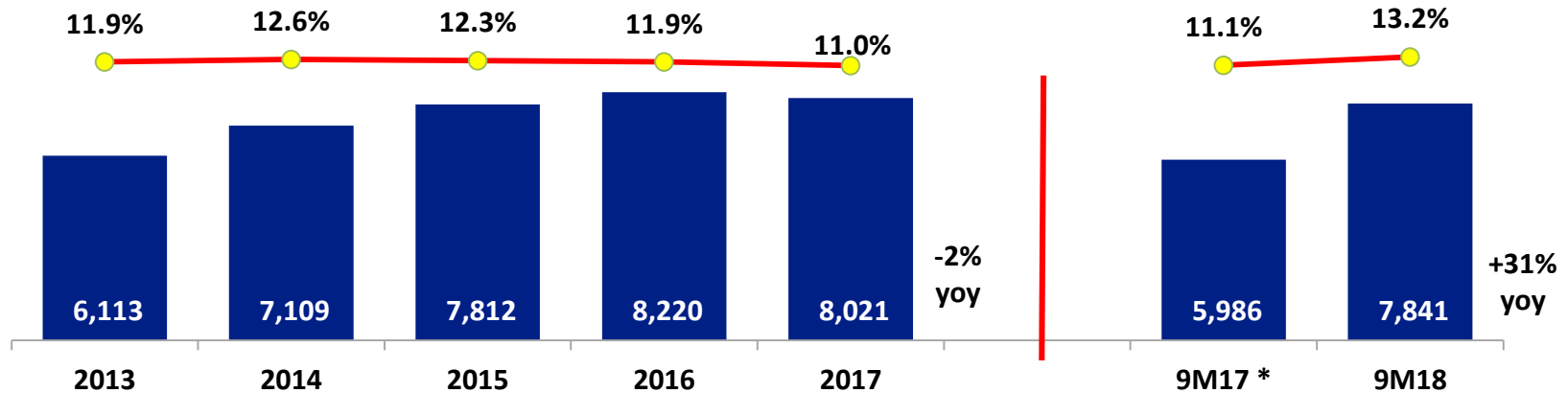


\* Excluding non-recurring items

# Profitability Trend

## Core Profit & Core Profit Margin

(THB mm)



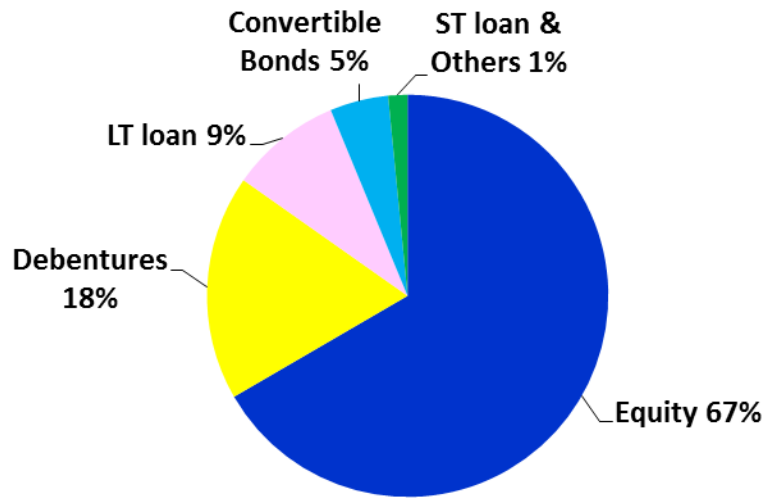
\* If including non-recurring item, net profit margin in 9M17 would be 15.1%

## Commentary

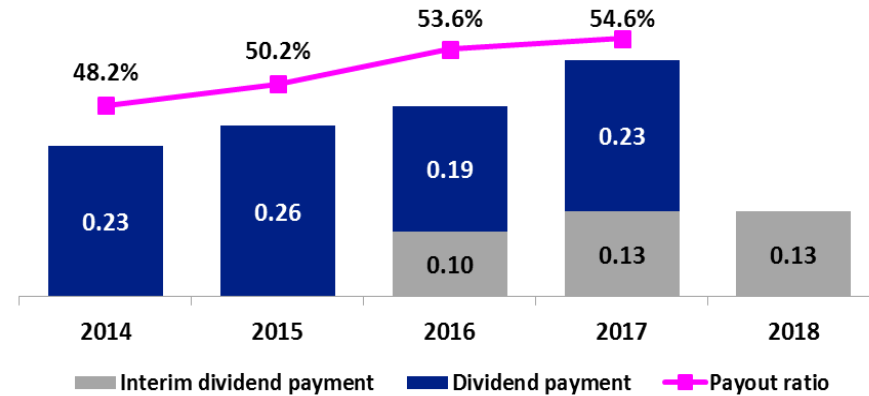
- In 9M18, net profit were THB 7,841 million with net profit margin of 13.2%
- If excluded gain on sales of investment in BH of Baht 2,195 mm in 9M17, core profit grew 31% yoy, mainly from
  - Strong revenue growth
  - Continued cost containment measures
  - Decrease in finance expenses

# Capital Management

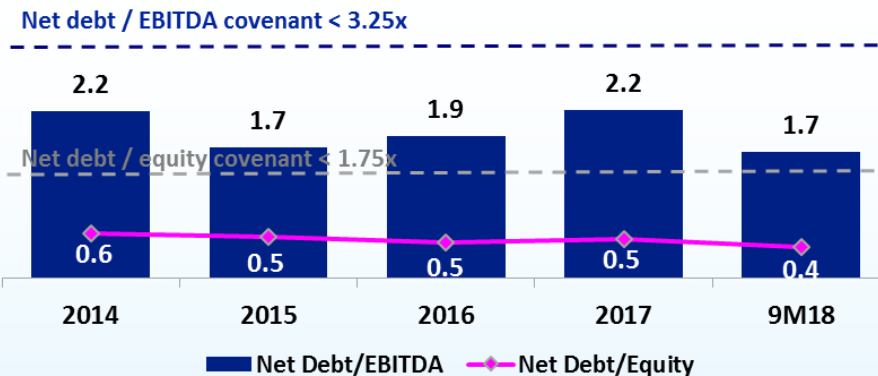
## Capital Structure as of September 2018



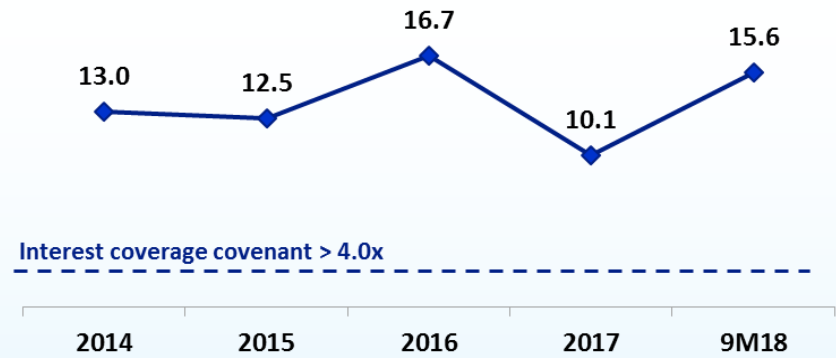
## Dividend Payment & Payout Ratio



## Gearing Ratios: Well Within Covenants



## Interest Coverage



## Healthcare Industry

# Key Trend for Thai Healthcare Industry

## Supportive Demographic and Economic Trends

- Aging demographics and rising income support growth of Thai healthcare
- Thailand as top tourist destination, capable medical personnel, convenient infrastructure & facilities and value for money attract medical tourism

## Healthy Trend

- Increase health conscious lifestyle driven demand on preventive care
- Shifting from traditionally treatment-based approach to preventive care which focuses on individual genetic, wellness, early detection, vaccination, diet and exercise including mental health awareness

## Health Insurance

- Insurance companies increase co-operation with local hospitals to increase Thailand's private health insurance penetration
- Thai Government approved tax break on premiums paid for health insurance supporting an increase in healthcare demand

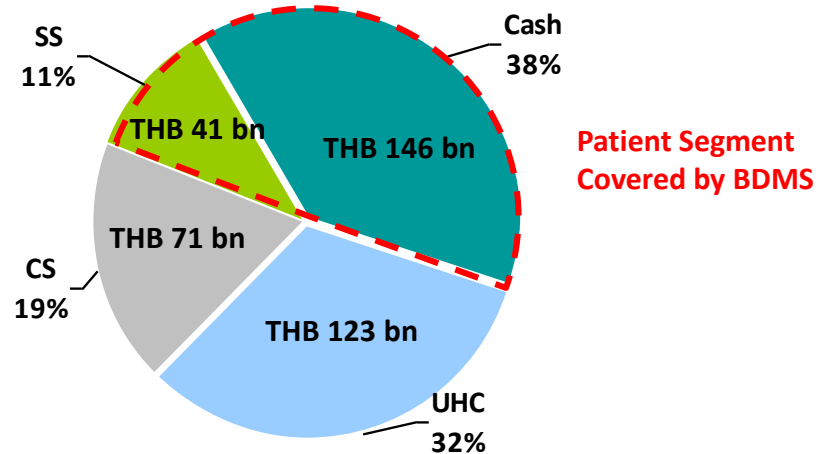
## Health Tech

- Mobile health apps would increase health conscious and preventive care
- Support existing healthcare service rather than replacement
- Mostly in searching for doctor and personal health information

# Thailand Healthcare Coverage

## Healthcare Segments in Thailand

Total Expenditure for 2016: THB 381 bn



Source: National Health Security Office (NHSO), The Office of the National Economic and Social Development Board (NESDB) and Social Security Office (SSO)

<b>Universal Healthcare Coverage (UHC)</b>	A welfare program for Thai people to receive medical coverage for IPD and OPD care at registered facilities
<b>Civil Servant (CS)</b>	A welfare program provided to employees of governments and state-owned enterprises
<b>Social Security Scheme (SS)</b>	Minimum requirement of healthcare provided to employees of private companies
<b>Private Healthcare (Cash)</b>	Proportion of Thai population not covered or choose not to use public healthcare schemes (UHC, CS and SS), though may have private insurance coverage



# Thailand Healthcare Demand and Supply

## Healthcare Supply in Thailand (2016)

	# of Hospitals	# of Beds
Private	347	40,720
Public	864	100,782
<b>Total</b>	<b>1,211</b>	<b>141,502</b>

(Number per 10,000 population)	Thailand	Global*
Doctor	5	14
Nurse	24	30
Bed	22	26

\* Data as of 2014

Source: WHO, NESDB and NSO

## BDMS Market Coverage (2016)

	Total Private Beds	BDMS Registered Beds *	Market Share
Bangkok	17,404	2,869	16%
Central	11,614	2,004	17%
South	3,111	662	21%
Northeast	3,332	337	10%
North	5,259	194	4%
<b>Total</b>	<b>40,720</b>	<b>6,066</b>	<b>15%</b>

\* Company data as of October 2018

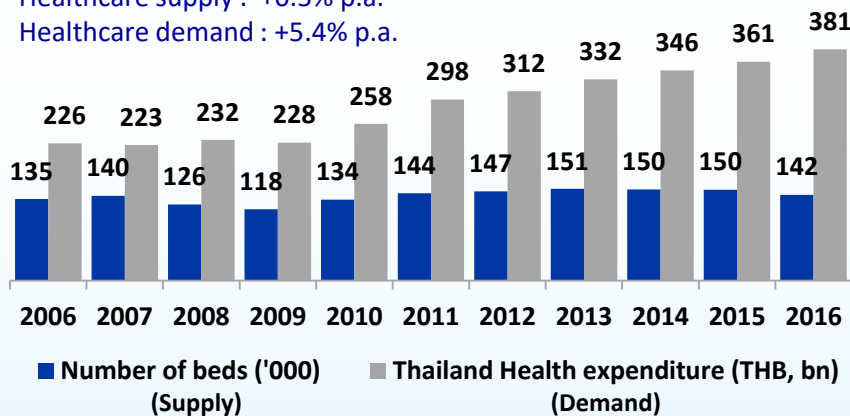
Source: NESDB and NSO

## Healthcare Demand Growing Faster than Supply

10 Years CAGR (2006-2016)

Healthcare supply : +0.5% p.a.

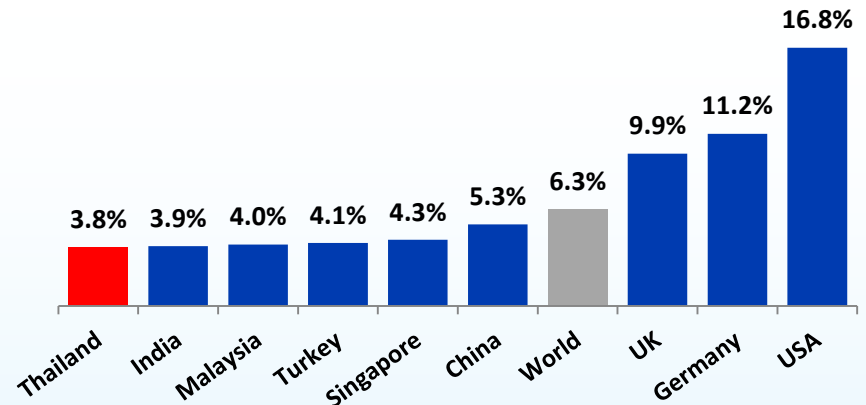
Healthcare demand : +5.4% p.a.



Source : NESDB and NSO

## Low Healthcare Penetration

% of Healthcare expenditure to GDP

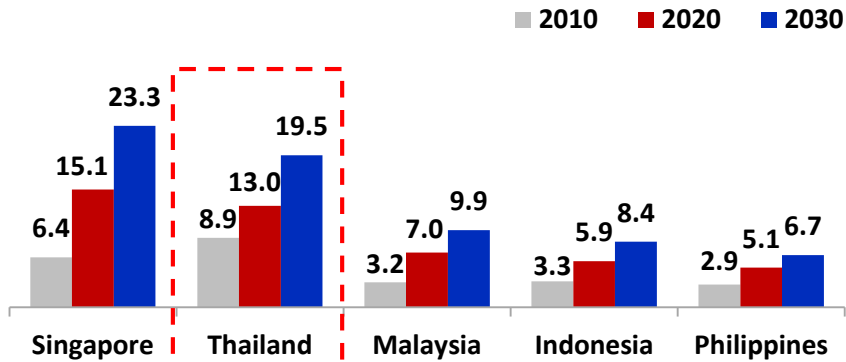


Source: WHO (2015)

# Increasing Thailand Healthcare Demand

## Population Growth and Aging Profile

Percentage of population above 65 years (%)



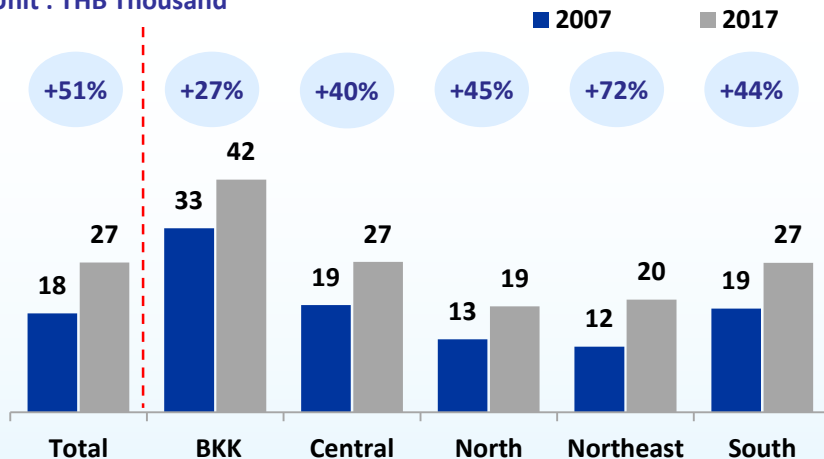
Source: UN Population Database: 2015

## Commentary

- Aging population generates greater demand for healthcare expenditure
- Monthly income per household in Thailand increased by 51% during 2007-17. This would support growing demand for healthcare
- Health insurance reduces financial burden of out-of-pocket expense. Increasing trend for health insurance will benefit private hospitals

## Thailand Monthly Income per Household

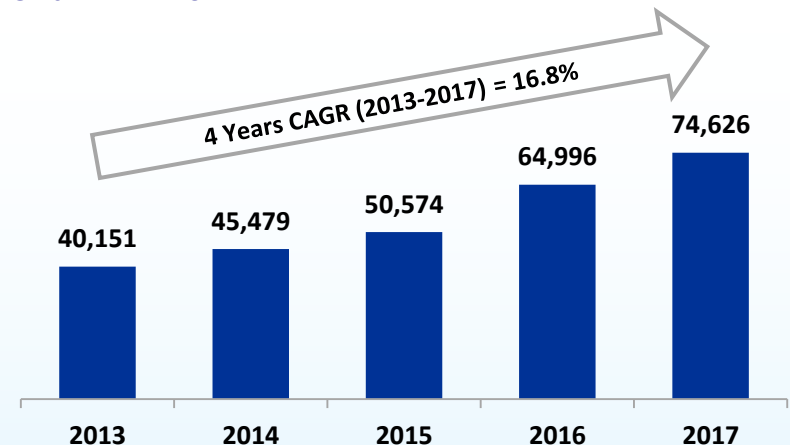
Unit : THB Thousand



Source : NESDB

## Total Value of Private Health Insurance Premium

Unit : THB Million



Source: OIC

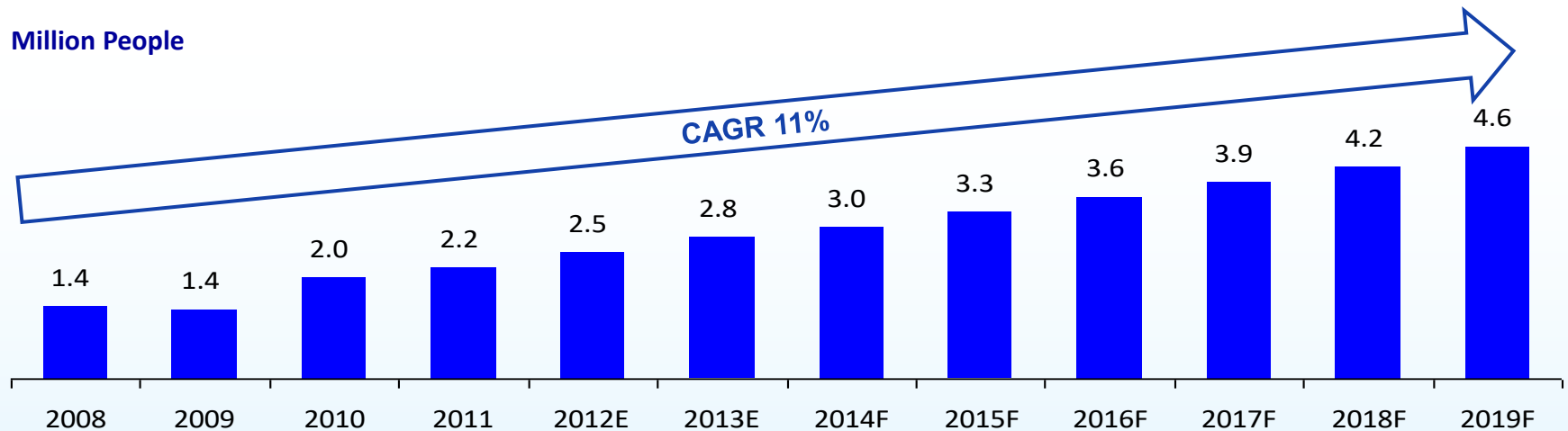
# Medical Tourism

## Chinese Tourists Drive Strong Growth of International Tourists Arrival to Thailand



Source: Tourism Authority of Thailand and Ministry of Tourism & Sports

## Increasing Trend of Medical Tourists to Thailand



Source: EIC, SCB and Ministry of Commerce

# Medical Tourism

## Medical Tourism as a Rising Phenomenon

Procedures ( In USD)	USA	Singapore	Thailand	Malaysia	India
Heart Bypass	123,000	17,200	15,000	12,100	7,900
Heart Valve Replacement	170,000	16,900	17,200	13,500	9,500
Knee Replacement	35,000	16,000	14,000	7,700	6,600
Spinal Fusion	110,000	12,800	9,500	6,000	10,300
IVF Treatment	12,400	14,900	4,100	6,900	2,500

Source: MedicaItourism.com (2016)

## Comparison Five Year Survival Rate of Primary Tumor

Primary Tumor	China	Taiwan	Japan	Germany	Hong Kong	USA	BDMS
Breast	73%	82.4%	84.7%	85.3%	90%	88.6%	94.8%
Lung	16.1%	14.3%	30.1%	16.2%	21%	18.7%	39.6%
Colorectal	47.2%	60%	62.3%	63.4%	60.9%	64.4%	78.5%

Sources: WHO, <http://www.thelancet.com>, <http://onlinelibrary.wiley.com> and Wattanosoth Cancer Registry 2014

# Sustainability Development

## Your Trusted Healthcare Network

### Good Corporate Governance

Practiced good Corporate Governance to ensure long-term growth and sustainability

### Employee Well-Being and Human Rights

Fully committed to support diversity and human rights in term of gender and cultural differences

### Environmental Friendly

Encouraged reductions of energy use without reducing the quality of care and raised awareness on efficient energy consumption

### Social and Community Development

Encouraged donation of medical supplies and equipment to unfortunate person  
Provided health check-up to promote health and well-being of communities



# Appendix

## Shareholding Structure

(As of 15 March 2018)

	% of Shareholding
1 Mr. Prasert Prasarttong-Osoth, M.D. and family	23.3%
2 Mr. Wichai Thongtang and family	7.5%
3 Bangkok Airways*	7.3%
4 The Viriyah Insurance Co., Ltd.	6.1%
5 Thai NVDR Co., Ltd.	5.3%
6 Social Security Office	4.1%
7 Mr. Chirothana Suchato, M.D. and family	2.6%
8 Ladpli family**	2.3%
9 Mr. Chuladej Yossundharakul, M.D. and family	1.9%
10 The Bank of New York Mellon	1.7%
<b>Total</b>	<b>62.1%</b>

Source: Summary of the information from Thailand Securities Depository Company Limited (TSD)

\* Consisted of Bangkok Airways PCL and Bangkok Airways Holding Co., Ltd

\*\* Consisted of Miss Napamas Ladpli, Mrs. Atinuch Malakul Na Ayudhaya and Mr. Parameth Ladpli

# Medical Cooperation

## International and Local Partnership

### Cancer



- Sister Institute with MD Anderson on cancer

### Occupational health, Pediatrics, Rehabilitation and Informatics



- Collaboration with Oregon Health and Science University on occupational health, pediatrics, rehabilitation, clinical simulation and informatics

### Trauma and Orthopedics



- Collaboration with Missouri Orthopaedic Institute, University of Missouri Health Care in education, training and research



- Collaboration with Hannover Medical School for education and research on trauma and orthopedics



- Collaboration with Stanford University for knowledge sharing on orthopedics



# Medical Cooperation

## International and Local Partnership

### Neuroscience



- Research collaboration with Department of Neurosurgery, Cedars-Sinai on the TRFS laser device for brain tumor surgery

- Collaboration with Black Brain Health Center of Dr. Keith L. Black, one of the world leading neurosurgeons

### Gastrointestinal



- Collaboration with Sano Hospital on Gastrointestinal Medicine

### Others



- Collaboration with Nagoya University for education, medical treatment assistance and patient referral



- Collaboration with local institutions

# Investments

## Investments in Other Hospitals : - Listed Companies

- Ramkhamhaeng Hospital PCL (RAM) 38.24%
- Bumrungrad Hospital PCL (BH) 24.88%

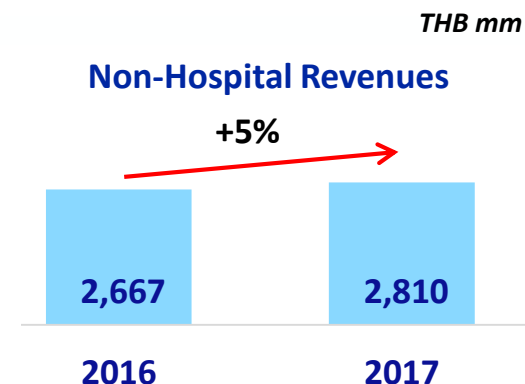
## Non- Hospital Strategic Investments \*

### Pharmaceutical Business

- A.N.B. Laboratories 100% Sterile pharmaceutical product manufacturer & distributor
- Save Drug Center 100% Drugstore
- The Medicpharma 87% Generic pharmaceutical product manufacturer
- General Hospital Products PCL 46% Sterile pharmaceutical product manufacturer




### Other Complimentary Business

- National Healthcare Systems 100% Central lab, central supply chain, procurement & other shared services
- Greenline Synergy 100% Shared IT services
- Bangkok Premier Life Insurance Broker 100% Health & life insurance broker
- Bangkok Helicopter Services 100% Transportation of patients via helicopter services








\* Not included all BDMS' investments



**Group 1 (Bangkok&West&Cambodia) Ownership No. of Beds**

1. Bangkok Hospital	} (BHQ)	100%		373
2. Bangkok Heart Hospital		100%		97
3. Wattanosoth Hospital		100%		48
4. Chiva Transitional Care		100%		52
5. Bangkok Huahin (BHN)		100%		64
6. Bangkok Sanamchan (BSN)		100%		210
7. Thepakorn (TPK)		44.5%		100
8. Bangkok Phetchaburi (BPR)		100%		255
9. Bangkok Muangraj (BMR)		100%		142
10. Royal Phnom Penh (RPH)		100%		100
11. Royal Angkor International (RAH)		80.0%		30


**Group 2**

12. Samitivej Sukhumvit (SVH)	95.8%		275
13. Samitivej Srinakarin (SNH)	95.8%		400
14. Samitivej Sriracha (SSH)	70.1%		184
15. Samitivej Thonburi (STH)	63.5%		150
16. Samitivej Chonburi (SCH)	100%		220
17. Samitivej Chinatown (SCT)	100%		59
18. BNH Hospital (BNH)	91.5%		144

**Group 3 (East)**

19. Bangkok Pattaya (BPH)	97.3%		400
20. Bangkok Rayong (BRH)	100%		220
21. Bangkok Chanthaburi (BCH)	99.7%		170
22. Bangkok Trat (BTH)	99.8%		114
23. Sri Rayong (SRH)	100%		195


**Group 4 (North&Northeast)**

24. Bangkok Chiangmai (BCM)	100%		175
25. Bangkok Ratchasima (BKH)	91.4%		180
26. Bangkok Pakchong (BHP)	91.4%		31




**Group 4 (North&Northeast)**

27. Bangkok Udon (BUD)	100%		120
28. Bangkok Phitsanulok (BPL)	100%		195
29. Bangkok Khon Kaen (BKN)	100%		140

**Group 5**

30. Phyathai 1 (PT1)	100%		224
31. Phyathai 2 (PT2)	99.2%		260
32. Phyathai 3 (PT3)	98.2%		267
33. Phyathai Sriracha (PTS)	75.1%		350
34. Phyathai Nawamin (PTN)	99.8%		140
35. Paolo Paholyothin (PLP)	100%		267
36. Paolo Samutprakarn(PLS)	93.6%		200
37. Paolo Chokchai 4 (PLC)	85.7%		169
38. Paolo Rangsit (PLR)	100%		150
39. Paolo Kaset (PLK)	100%		162
40. Paolo Phrapradaeng (PLD)	84.0%		60

**Group 6 (South)**

41. Bangkok Phuket (BPK)	99.7%		266
42. Siriroj International (SIH)	100%		151
43. Dibuk (DBK)	99.7%		100
44. Bangkok Hat Yai (BHH)	98.8%		200
45. Bangkok Samui (BSH)	100%		52
46. Bangkok Surat (BSR)	100%		150

**Group 7: Non-Hospital**

1. National Healthcare System	100%
2. Bio Molecular Laboratories	95.0%
3. The Medicpharma	87.1%
4. A.N.B Laboratories	100%
5. Save Drug Center	100%
6. General Hospital Products	46.0%

Remark:- Number of beds is structured beds