



The Southeast Asia Aid Map is a comprehensive database tracking official development finance (ODF) flows across Southeast Asia. Launched by the Lowy Institute in 2023 and updated annually, the project is supported by the Australian Department of Foreign Affairs and Trade. By promoting greater transparency of ODF flows, the Lowy Institute seeks to increase coordination, improve accountability, and strengthen decision-making and policy debate on aid, development, and geoeconomic competition in the region.

This third edition of the Southeast Asia Aid Map encompasses the period from 2015 to 2023. It includes data on more than 130,000 projects carried out by 109 development partners, totalling \$290 billion. The research covers all 11 Southeast Asian nations: Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor-Leste, and Vietnam.

The Map synthesises millions of data points from official reporting mechanisms and databases. It combines this with information from thousands of publicly available documents including annual reports, financial statements, budget documents, news media reporting, and social media sources. The resulting database is the most comprehensive account ever assembled of development projects in Southeast Asia.

This 2025 Key Findings Report includes an analysis of Southeast Asia's evolving development finance landscape and a series of profiles on each of the 11 Southeast Asian countries covered in the database.

## Key findings in 2025

- Regional development support increased modestly in 2023 but remained below pre-Covid levels.
- US, EU, and UK aid cuts could see official development finance to the region decline by more than \$2 billion in coming years.
- Western aid cuts and rising trade tensions will reduce Southeast Asia's development choices and risk ceding ground to China.
- Aid cuts will also deepen a development divide, with poorer countries and social sector priorities falling behind.
- Southeast Asia's infrastructure race has slowed to a crawl.
- The region's energy transition is dangerously underfunded, with global implications.
- Progress on climate and social inclusion may come under pressure.

To see more and use the fully interactive features of the Southeast Asia Aid Map, visit [seamap.lowyinstitute.org](https://seamap.lowyinstitute.org)

# THAILAND

<b>\$13.5 billion</b>	<b>SPENT</b>
<b>\$35.7 billion</b>	<b>COMMITTED</b>
<b>9,941</b>	<b>PROJECTS</b>
<b>66</b>	<b>DEVELOPMENT PARTNERS</b>

Thailand is an upper-middle income economy according to the World Bank.

In 2023, it received \$760 million in official development finance. Thailand's primary development partners are China, responsible for more than one-third of Thailand's ODF received from 2015 to 2023, the Asian Development Bank (ADB), and Japan. While their relative weighting has shifted over time, those three partners have accounted for more than 80% of Thailand's ODF. China's support to Thailand peaked in 2017, coinciding with the height of the Belt and Road Initiative. The major sector of investment for China's ODF is transport and storage, through a multi-billion-dollar loan for high-speed rail.

Thailand receives far more ODF, as a proportion of total ODF received, in the transport and storage and government and civil society sectors than the regional average. Like other upper-middle income economies, Thailand receives less than the regional average in the water and sanitation, health, education, and agriculture, forestry, and fishing sectors. Over 2015–23, Thailand received more than the regional average for ODF integrating climate action (45%). The proportion of funding targeting gender equality was equivalent to the regional average at 25%, while funding with a focus on disability inclusion was lower than the regional average at 6%.

Thailand is the region's largest provider of intra-regional ODF, disbursing an average of \$70 million annually from 2015 to 2022. The major beneficiaries of Thailand's development program are Laos, Myanmar, and Cambodia, though it has also disbursed assistance to Vietnam, Indonesia, the Philippines, Timor-Leste, and Malaysia. The Aid Map was unable to confirm Thailand's provision of bilateral intra-regional ODF in 2023, with incomplete data recorded despite Thailand's commendable history of voluntarily reporting its activities to the Organisation for Economic Cooperation and Development in previous years.

