USDA Foreign Agricultural Service
GAIN Report
Global Agricultural Information Network

Required Report - public distribution

Date: 1/19/2018

GAIN Report Number: TH8015

Thailand

Exporter Guide

2017

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Report Highlights:
This guide serves as a resource for U.S. companies seeking to do business in Thailand and provides practical tips and information on local business practices, consumer preferences and trends, food standards and regulations, and import and inspection procedures. This report also identifies opportunities and entry approaches for the three major market sectors (food retail, food service, and food processing). Finally, this guide identifies the best high-value product prospects and key contacts.

Post:
Bangkok

Section I. Market Overview

Thailand is Southeast Asia's second largest economy with a Gross Domestic Product (GDP) of U.S. $449 billion. Exports account for more than 52 percent of its GDP. Thailand remains a strong agricultural competitor as it is the world's leading exporter of natural rubber, frozen shrimp, canned tuna, canned pineapples, cooked poultry, and cassava. It is also a major exporter of sugar and rice. According to the National Economic and Social Development Board (NESDB), Thailand's economy is forecast to grow between 3.6-4.6 percent in 2018 compared to 3.9 percent growth in 2017. In 2017, Thailand's economy benefited from higher levels of government expenditure and the expansion of the tourism sector. The economy is expected to improve in 2018 due to favorable global economic growth; increased government spending particularly on infrastructure projects; favorable private investment trends; the continual expansion of key economic sectors; reduced unemployment, and increased and household income. In addition, the continual expansion of the tourism sector will continue to fuel economic growth.

Thailand is the 15th largest export market for U.S. agricultural products. In 2016, U.S. consumer oriented agri-food exports to Thailand were valued at U.S. $411 million while total U.S. agricultural imports of these products from Thailand were nearly U.S. $1.5 billion (Table 1).

Table 1: U.S.-Thailand Trade of Consumer Oriented Agricultural Products

(million; US$ per year)	2012	2013	2014	2015	2016
U.S. Imports from Thailand	1,162	1,274	1,349	1,423	1,554
U.S. Exports to Thailand	401	672	414	409	411
Trade Balance	-762	-601	-935	-1014	-1143
Source: Global Trade Atlas and USDA Foreign Agricultural Service - Bangkok, Thailand					

Table 2: Change in Thai Food Import Mix from the U.S.

(million; US$ per year; % of total)	2012	2013	2014	2015	2016
Bulk & Intermediate	**1,146**	**1,061**	**1,324**	**1,464**	**1,309**
%	64%	53%	68%	72%	69%
Consumer Oriented	**401**	**672**	**414**	**409**	**411**
%	22%	33%	21%	20%	22%
Edible Fishery	**253**	**280**	**213**	**156**	**172**
%	14%	14%	11%	8%	9%
Total	**1,800**	**2,013**	**1,951**	**2,029**	**1,892**
Source: Global Trade Atlas and USDA Foreign Agricultural Service - Bangkok, Thailand					

Thailand currently has preferential trade arrangements with the Association of Southeast Asian Nation countries (ASEAN), Australia-New Zealand, China, India, Japan, Peru, South Korea, and Chile (Table

3). These agreements have created additional challenges for U.S. agricultural exports, particularly due to large tariff differentials.

Table 3: A list of Thailand's free trade agreements

Country	Trade Agreement Effective Date
Thailand-Australia	January 1, 2005
Thailand-New Zealand	July 1, 2005
Thailand-Japan	November 1, 2007
Thailand-India	September 1, 2004
ASEAN-China	October 1, 2003
ASEAN-Korea	January 1, 2010
ASEAN-Australia-New Zealand	March 12, 2010
ASEAN-India	January 1, 2010
ASEAN-Japan	June 1, 2009
ASEAN Free Trade Area (AFTA)	January 1, 2002 – 5 percent January 1, 2010 – 0 percent
Thailand-Peru	December 31, 2011
Thailand-Chile	November 5, 2015

Duties on imported U.S. consumer-ready food products range between 30-60 percent. Tariffs on meats, fresh fruits and vegetables, and processed foods are equally high, even for items with little or no domestic production. For example, frozen potatoes are not produced in Thailand but face a tariff of 30 percent. The tariff on apples stands at 10 percent, while pears and cherries tariffs are 30 and 40 percent respectively. Section IV of this report has a detailed list of bound duties on major U.S. agricultural exports.

Advantages	Challenges
About 38 million middle-to-upper income consumers are eager to purchase imported food products.	U.S. products are not always price-competitive due to high tariffs and shipping costs.
A dynamic and eager younger population (between ages of 15 and 35, representing 30 percent of the total population) is willing to try new products and is receptive to trends that fit their westernized lifestyles.	Free trade agreements with China, Australia, New Zealand, Chile, Japan, and Korea have made U.S. products less competitive especially for high value consumer products such as meats, processed meat, wine, spirits, cherries, peaches, plums, pears, frozen potatoes, and cheeses.
Thais in urban areas (54 percent of the population) increasingly spend more on imported food items and have become relatively brand conscious and are changing their eating habits to accept more western style foods.	Local production is increasingly substituting food imports. Locally produced snack foods, salad dressings, sauces, jams and other processed foods are relatively inexpensive.
Increasing purchasing power of consumers	Market penetration for imported products is mostly

in rural areas translates into more discretionary spending on non-traditional agricultural products.	concentrated in Bangkok and major tourist-destination areas.
The Thai food processing industry is looking for new ingredients and shows a strong interest in importing health and functional food ingredients.	Imports of some U.S. food products are currently subject to restrictive trade barriers, including high import tariffs, rigid food import procedures, and burdensome documentation requirements.
Growing number of retail outlets.	The oligopolistic nature of hypermarkets exerts some control over prices, while convenience stores prefer low priced locally or regionally sourced products.
Well-developed food service industry.	Strong government protection on local agricultural products such as poultry and livestock products make it difficult for imported products to enter the market.
Growth in the tourism industry and an increase in the number of hotels leads to greater demand for imported food products.	Regional tourists sometimes seek cheaper local food alternatives or food products sourced from their respective countries.
Middle income women give greater attention to health and beauty and are demanding new products from retailers.	Free trade agreements with neighboring Asian countries are decreasing U.S. market share.

Section II. Exporter Business Tips

Communications

When greeting a Thai, use the word Khun (pronounced coon) in place of "Mr." or "Mrs." and the person’s first name, which is the first name on his or her business card. For example, a Westerner with the name "Peter Moore" would be called "Khun Peter." Among Thais, family names are not usually used. Most Thais refer to each other by their first names only. Never refer to yourself with the word Khun; simply say your first name. Thais will probably address you by using "Mr." or "Mrs." and your first name.

Introductions: foreign companies may write directly to Thai companies, although personal introductions will always enhance a firm’s credibility and acceptance.

Most Thais greet someone by bowing slightly towards them while bringing the hands pressed together in a praying position between the chest and forehead. The exact location of the hand depends on the level of respect being offered – the height and depth of a person’s bow indicates social status. This gesture, known as a "wai," can be used when greeting someone on arrival and departure, and also when saying "I am sorry" or "thank you."

It would behoove foreign businesses to hire a representative or agent with local connections who have a good understanding of Thai food and agriculture regulations and food import procedures.

Networking with government officials and/or correct authorities can be the key to doing business successfully in Thailand.

Keep in mind that in most of Asia, calendar dates are shown in the day/month/year format; ex. 05/12/17 means December 5, 2017. To avoid confusion, you may want to spell the name of the month in your correspondence.

Have some fun by learning a few words of the local language, especially social greetings. This displays interest in the country.

Meetings

Avoid business visits during New Year festivals (including Chinese and Thai).

Heavy traffic is the most common excuse for tardiness.

Business cards are always exchanged at the first meeting. Failure to offer a business card may make Thais suspicious of your position and authority. Be sure your card indicates your position and responsibility. And be sure to have your personal information in Thai on the back of the card. Don't throw or slide your card.

Begin initial meetings with casual conversation on such topics as your travels, the beauties of Thailand, and possibly questions about your counterpart's overseas experiences.

Avoid topics relating to politics, the royal family, and religion. A little praise of the country and the Thai people goes a long way.

Never touch or point with your feet. It is considered rude to cross your legs and point your feet at someone. Thais place a great importance on appearance and politeness.

Exporting

It is essential to visit the market to conduct market research, especially for product testing, price comparisons, gauging competitors, consumer preferences, etc.

Localize your products: adjust the product to local tastes, verify consumer preferences, and set a competitive price.

U.S. exporters should identify the best distribution channel (e.g. local importers, distributors, supermarkets, retailers, etc.) and establish a good relationship with their representatives as they are very useful in facilitating and promoting exports of U.S. consumer-ready foods to Thailand.

Trade fair participation is another way to raise awareness of your product.

In Thailand, some large manufacturers and retailers import raw materials or products directly while many medium, small manufacturers, retailers, as well as hotels, prefer to purchase products from local importers.

Successful U.S. exporters must provide reliable product availability, consistent quality, technical support, and respond to inquiries within 24 hours.

Understand that there is likely only one decision-maker in a company, and that person often is not the purchasing manager.

Product Registration: Applications for product registration should be submitted to the Food Bureau of the Thai Food and Drug Administration (FDA). The approximate amount of time required for product registration, starting from submitting the application, is about one month. However, delays are usually caused by inaccurate or unacceptable details in the documents. There is little chance for licensing a product unless the manufacturer or exporter provides the necessary details required by the Thai FDA.

The product should be packed and shipped for a tropical climate and have clear storage instructions.

When introducing new products, several factors should be kept in mind. Middle to upper income Thai consumers have an aversion to low quality products and are attracted to branded products. They also tend to be image conscious. Existing brand loyalties are most likely to be replaced by new products that focus on good quality, better packaging, availability, promotions, and competitive prices.

Be patient and think long term. It is not unusual to visit the market 2-3 times before details are finalized.

Study the most recent Food and Agricultural Import Regulations and Standards report for Thailand. This document contains information on food laws, labeling requirements, food additive regulations, pesticide and other contaminants, import procedures, and other key regulations, requirements and specific standards. The report is available on the internet at https://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx

Contact the Foreign Agricultural Service at the U.S. Embassy, Bangkok (agbangkok@fas.usda.gov) with any questions on issues such as standards, tariffs, regulations, labeling or other concerns.

Section III. Market Sector Structure & Trends

The retail market accounts for more than 70 percent of total food spending while consumers are allocating a lower proportion of their expenditures to food service (30 percent). This reflects a tendency among low and middle income Thais to cook at home rather than dine out, particularly in rural areas. However, eating out and patronizing restaurants is growing among the younger generation and working professionals as it is more convenient, entertaining, and provides more free time compared to cooking at home. The increased number of food establishments in the market has also contributed to the growing Thai food service sector. Thailand's consumer market is relatively mature with high potential for future grow due to the country's economic growth, on-going urbanization, and growing middle class. Consumer disposable incomes also continue to rise. In 2016, Thai consumer expenditures on food and beverages reached U.S. $67 billion and per capita disposable income was U.S. $3,143. The typical Thai diet consists of rice, meats, eggs, vegetables, fish, and seafood. In 2016, spending on food and non-alcoholic beverages accounted for 25 percent of all household expenditures.

Table 4: Consumer Expenditure on Food and Beverages 2012-2016					
(m; US$)	2012	2013	2014	2015	2016
Food	50,519.90	52,621.70	51,691.60	50,399.40	51,129.10
Bread and Cereals	11,593.00	11,751.90	11,347.00	10,951.90	11,076.90
Meat	5,872.30	6,302.30	6,558.50	6,306.80	6,373.60
Fish and Seafood	6,260.70	6,661.50	6,475.50	6,470.00	6,588.00
Milk, Cheese, and Eggs	4,077.90	4,611.10	4,455.70	4,055.40	4,073.40
Oils and Fats	2,757.80	2,765.90	2,826.10	2,648.90	2,695.80
Fruits	4,737.90	4,995.40	4,899.20	4,773.10	4,878.40
Vegetables	11,907.30	12,106.30	11,735.30	11,864.10	12,081.00
Sugar and Confectionery	1,596.90	1,661.40	1,638.60	1,586.80	1,609.20
Other Food	1,716.10	1,766.00	1,755.70	1,742.30	1,752.90
Non-Alcoholic Beverages	7,778.70	8,274.70	8,296.10	7,971.30	8,035.30
Coffee, Tea, and Cocoa	1,584.10	1,700.10	1,711.60	1,639.30	1,659.50
Mineral Waters, Soft Drinks, Fruit and Vegetable Juices	6,194.60	6,574.60	6,584.50	6,332.00	6,375.80
Alcoholic Beverages	5,614.20	5,609.80	5,512.00	5,404.10	5,419.40
Spirits	2,704.90	2,685.50	2,634.00	2,577.80	2,601.10
Wine	210.30	241.40	267.60	269.90	277.20
Beer	2,699.00	2,682.90	2,610.40	2,556.50	2,541.10
Source: Euromonitor and USDA Foreign Agricultural Service - Bangkok, Thailand					

Retail Sector

Thailand's food and beverage sector is one of the fastest growing sectors in the Thai economy. In 2016, the retail sector expanded by 3-5 percent and is expected to grow at 4 percent in 2017. Changing Thai consumer habits and a growing urban population offers modern retailers many opportunities for expansion. The retail market continues to grow rapidly and not just in the Bangkok metropolitan area. In most large cities, new retail developments are being constructed ranging from small stores to community malls. The market structure for food retailers continues to evolve to encompass hypermarkets, supermarkets, cash and carry, and convenience stores. Convenience stores continue to gain market share while traditional retailers have experience a steady gradual decline. Modern food retailing accounts for approximately 70 percent of total retail sales as shoppers have transitioned from wet markets and grocery stores to hypermarkets and supermarkets. Thailand's retail sector has benefited from new investment with the majority of new investment coming from leading international retail chains such as the United Kingdom based Tesco which operates the Tesco Lotus supermarket chain in Thailand, Big C Supercenter from the Casino Group, and the cash and carry retailer Siam Makro. Locally run supermarkets and convenience stores have also increased in numbers: including stores such as Villa Market, Tops Marketplace, Foodland Supermarket, 7-Eleven, Home Fresh Mart, and Gourmet Market.

Supermarkets have greatly influenced the lifestyle of urban Thais, expatriates, and upper-income communities. Many of the supermarkets chains offer excellent opportunities for U.S. exporters of consumer food items. For example, Villa Market is a supermarket chain that carries a wide range of imported goods and caters to foreigners, particularly western expatriates. UFM Fuji supermarket despite catering to Japanese expatriates in Thailand also provides opportunities for a wide range of imported products. Similarly, Foodland which caters to local Thais has many imported products. Other significant grocery chains include MaxValu, Gourmet Market, Tops, and Home Fresh Mart.

One unique thing about the retail format is that many of the large companies in this sector have a wide variety of store formats ranging from hypermarket to convenience store. For example, Big C Supermarket PCL continues to promote its grocery business aggressively through various business models from hypermarket like Big C Extra and Big C Supercenter to Big C Supermarket and Mini Big C convenience stores. Similarly, CP All that has operated Siam Makro as hypermarket or cash and carry format and 7-Eleven convenience stores nationwide.

Thailand’s retail sector employs approximately 5 to 6 percent of the total population. In 2016, Thailand’s store-based retail sales totaled more than U.S. $83 billion of which about 62 percent was spent on food and beverages with the remaining 38 percent being spent on non-food items. This accounts for an increase of U.S. $700 million in total food retail sales from the year before. According to Euromonitor, non-store retailing which includes home shopping, internet retailing, and direct sales totaled U.S. $4.7 billion or 5 percent of total retail sales in 2016. Internet sales reached U.S. $1.5 billion in 2016, growing 11.2 percent from the previous year. Internet sales are forecast to grow a further 61.3 percent by 2021. In 2017, the number of internet users in Thailand is around 39 million people and projected to grow to 49 million by 2022.

Over the past decade, Thailand’s retail food sector has been one of the fastest-growing in the world. This sector has diverse store layouts ranging from wet markets to hypermarkets. The retail food sector can be classified into two models: traditional and modern. Modern retail establishments utilize standardized management systems, point of sale materials, and are located in densely populated areas, while the traditional retailers/operators consist of mom and pop stores, street vendors, and wet markets that are commonly found in the rural areas. These stores are usually smaller establishments operated by local family owners.

Competition in the retail food sector is expected to remain intense. Food retailers frequently use marketing discounts or promotional events to encourage consumer purchases. For example, Tops Marketplace has a 1-Card which members can use to get e-coupons and cashback. Other retailers offer discount coupons, buy one get one free deals, and other discounts. Food retailers are also competing through enlarged ready-to-eat shopping areas for take-home meals, including more precut fruit packages and dining seating inside the store. Some high-end food retailers such as Central Food Hall, Tops Market, Gourmet Market and Villa Market look to differentiate themselves by focusing on sustainability, healthy food items, and gluten free foods. This food category represents about 1 percent of total retail food sales.

Hypermarkets, supermarkets, and cash and carry establishments present excellent opportunities for U.S. exporters of consumer food items. The main factors U.S. exporters should consider before entering the Thai market are pricing, product shelf life, and consumer preferences. Intense competition in the retail food market, particularly from large-scale modern companies that use price strategies and loan extensions to low-income consumers, have led to the closure of many traditional stores. Thailand’s hypermarket sector is dominated by two large companies, which normally gives them bargaining power with suppliers. The convenience sector is not considered to be an attractive channel for U.S. products due to the pricing disadvantages as these stores mostly carry locally and regional produced goods. U.S. exporters should be aware that many U.S. branded food products such as snack foods, candy, chocolate, and breakfast cereals are already present in the market as locally or regionally produced food products.

Most food retailers recently modified their marketing strategies by expanding their private label product offerings, instituting money promotions, providing discounts, and starting loyalty programs in order to attract customers and maintain market share. Some supermarkets and hypermarkets have their own private label brands for ready-to-eat foods, ready-to-cook prepared foods, home-made bakery items, sausages, water, cooking oil, rice, sauces, dairy products, and fruit juices. These private label products provide a good market opportunity for U.S. food ingredients such as raisin, fish and seafood, although some U.S. ingredients, such as frozen potatoes, are not competitive due to lower tariff rates provided by Free Trade Agreements (FTA).

In Thailand, food retailers have expanded into online shopping along with other online services. Despite the growth of online shopping, there is still a large percentage of lower income Thai consumers who lack access to the internet and the computer skills to effectively use these platforms. These consumers still prefer to physically purchase their products rather than making online buying decisions. Euromonitor reports that total sales for internet retailing in Thailand reached U.S. $1.5 billion in 2016, 11 percent growth from 2015 and 80 percent growth from 2012. Internet retail sales are forecast to increase to 60 percent by 2021.

Entry Strategy – Supermarkets, Hypermarkets, and Cash and Carry

The best method for U.S. exporters to enter the Thai market is to contact supermarkets, hypermarkets, or cash and carry companies directly. Any retailer that does not have their own import division will have to contract with local importers or agents to meet the needs of the exporter. Choosing the right importer is one of the most important decisions for exporters wishing to do business in Thailand. The local importer will be a key partner to expand business opportunities and minimize the need for exporters to establish direct contact with multiple retail chains. In addition, a local importer familiar with market conditions and the regulatory environment can help exporters successfully market their products. U.S. exporters should be aware that many multinational retailers in Thailand charge listing fees or a listing allowance for new products. The fee will be charged in accordance with a formula based on the number of retail outlets and SKUs. U.S. exporters that want to promote brands and large volume products should contact importers and retailers to create a marketing campaign, as this kind of support is anticipated.

Distribution Channels - Supermarkets, Hypermarkets, and Cash and Carry

The distribution channel for supermarkets, cash and carry, and hypermarkets in Thailand normally starts with importers, then distributors, before being sent to a central distribution warehouse or directly to a retail outlet. Some supermarkets, superstores, and hypermarkets operated by multinational operators import food products directly and store them at their own distribution centers before delivery to each outlet.

Entry Strategy - Convenience Stores, Gas Marts, and Kiosks

The best method for U.S. exporters to enter this market segment is to contact the head office of the convenience store, gas mart, or kiosk. U.S. exporters should be aware of listing fees or listing allowances that may be charged by large convenience store chains. The fee will be charged in accordance with a formula based on the number of outlets and SKUs.

U.S. branded food sold in these stores is generally produced in Thailand or neighboring Southeast Asian countries. These products include snack foods, chocolates, cookies, candies, gums, and breakfast cereal. Distributors often import U.S. branded foods from neighboring countries rather than from the United States because of lower transportation costs and preferential tariffs under the ASEAN Free Trade Area (AFTA). U.S. products will be well received by Thai consumers in convenience stores if the price and quality is similar to what local suppliers and other low-cost exporting countries offer.

Distribution Channels - Convenience Stores, Gas Marts, and Kiosks

The common distribution channel for convenience stores, gas marts and kiosks begins with U.S. exporters, then to U.S. consolidators and traders, and ends with Thai distributors sending the food to convenience stores, gas marts and kiosk distribution centers. Some Thai distributors distribute foodstuffs directly to convenience stores, gas marts and kiosk outlets. However, some convenience stores like 7-Eleven have invested their own logistic and warehouse management systems called Regional Distribution Centers (RDC). For these chains, the distributors send the food to the RDC rather than directly to a specific outlet. Most food items that are distributed directly to the outlets are fresh, including baked goods and dairy products. The distribution pattern of different retailers varies depending on sales volume and number of outlets.

Entry Strategy - Traditional Markets

For U.S. exporters, Thai traditional wet markets can be difficult to enter considering the low prices, low consumer purchasing power, the size and traditional distribution channels of this segment, and consumer preferences for traditional Thai and Chinese food products.

Distribution Channels - Traditional Markets

Local manufacturers usually have their own distributors to distribute their products. Some local producers are under the supervision of a Royal Project in which assigned distributors manage the distribution.

Best Market Prospects

The best market prospects for U.S. suppliers include fresh fruits (cherries, grapes, strawberries, oranges, apples, berries), nuts (almond, walnuts, hazel nuts, and pistachios), breakfast cereal, frozen seafood (scallop, lobster, crab, oysters, wild-caught salmon, fish, mussel), dried fruits (raisin), fruit juices, jam, vegetable oils, candy, chocolate, dairy products (cheese, cheese spread, cream cheese, whipped cream, cheese sticks, cheese dip and ice-cream), pie fillings, meat, spices, seasonings and sauces, snack foods, crisp bread, syrup, vinegar, wine, spirits, beer and pet food.

The best-selling U.S. food products are fresh fruits (cherries, grapes, strawberries, and Washington apples), frozen fries, snack foods, breakfast cereal, wine, craft beer, dried fruits, popcorn, seafood including Alaska King crab legs, scallop, and fish, stone fruits (peaches, plums, nectarines) and pet foods. Products that are not currently present in the market in significant quantities, but have good sales potential are American bourbon and whisky, sugar confectionary, soup and broth, biscuits and wafers, candy, processed meat, chocolate milk mix, cheese, dip sauce, cooking products, and organic products.

Further information on this market sector is available in Thailand's Retail Food Sector Report.

HRI Food Service Sector

Thailand's large hotel and restaurant industry (HRI) food service sector comprises approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. The industry has steadily expanded in recent years driven by continuous growth in the country's tourism industry as well as a change in consumer behavior as modern urban families tend to eat out more regularly. Hotels, resorts, restaurants and institutional contractors are heavy users of imported food for food preparation and ready-to-eat meals. This sector attracts middle to higher income Thais, Thai corporate businessmen, resident expatriates, and tourists. In 2016, consumer expenditures on hotels and catering per capita were U.S. $572, which accounted for 17 percent of total consumer spending.

Thailand's tourism industry remains one of the strongest in the competitive Asia region and considered to be an important component of the service sector. The sector has grown to become one of the country's most productive and sustainable industries. The Tourism and Sports Ministry reported 32.6 million international tourist arrivals in 2016, setting a new record with a 9 percent increase from the 29.9 million tourists that visited Thailand in 2015. This is equivalent to 49 percent of Thailand's total population. Thailand's HRI food service sector is reliant on the tourism industry. Thus, the increase in tourist arrivals contributed to the growth in Thailand's HRI sector. Thailand's high tourism levels and increasing food consumption are expected to continue fueling the growth of the country's HRI food service sector. In addition, many on-going construction projects involving new community shopping malls are expected to serve as perfect venues for global food chains and premium restaurants.

According to Euromonitor, in 2016 the value of sales for the full-service restaurant sector was U.S. $4.8 billion. Sales for this sector are expected to increase to U.S. $5.69 billion in 2021. The restaurant sector is full of competition due to low barriers to entry, expansion from existing businesses, and increased number of both domestic and foreign competitors entering the sector. The growing number of restaurants and bakeries as well as the increasing variety of produced products has created more food choices for consumers. Sidewalk restaurants are gradually being replaced by food centers and food courts, which are more hygienic and convenient. Fast-food restaurants, chain restaurants, and food trucks have boomed in recent years and are expected to continue to grow in the future. In order to survive in this fiercely competitive environment, restaurants must find ways to differentiate themselves. Popular differentiation strategies include using high quality, premium food ingredients, creating unique menu items, using modern marketing promotions, and crafting an interesting restaurant environment to give to give customers a novel dining experience.

As the Thai population ages and the middle-class grows so has consumer demand for healthy food and quality service. This has caused restaurants to develop healthy food and beverage menu items and to use more premium ingredients. For example, the restaurant S&P introduced menu items made of quinoa such as quinoa fried rice with grilled mushroom; papaya salad with quinoa sticky rice and healthy beverages such as cold pressed fresh juices.

Technology has also influenced consumers' purchasing behaviors as they can easily access information through mobile phones or computers connected to the internet. Thai consumers, especially those between 20 and 40 years old, are increasingly embracing online shopping. This means that online food delivery services are gaining market share over traditional channels due to their convenience. The online food delivery service sector in Thailand is led by three market players: LineMan, Foodpanda, and Ubereats. It is estimated that the size of food delivery market in Thailand is about U.S. $800 million in 2016.

Sales of food and beverages account for about 30 percent of Thailand's hotel and resort revenues. On average, 30 percent of Thailand's HRI food and beverages are imported. The United States has a 15-20 percent market share. U.S. beef, seafood, cheeses, wines, beers, frozen potatoes, seasonings, etc., are well known in Thailand's hotel and restaurant trade and with airline catering companies.

Entry Strategy

In this sector, direct contact with local food service importers is the best entry for U.S. exporters. Normally hotels and resorts do not import food directly. It is easier for hotels and resorts to order from food service companies, because they specialize in providing high quality U.S. products. Restaurants such as fast food chains or family style restaurants also order and purchase imported food from food service companies or from their affiliates who act as their distributors. Five-star hotels and resorts are highly recommended for U.S. exporters. International food restaurants located in prime areas of Bangkok, Phuket, Hua Hin, Krabi, Chiang Mai, Samui Island and Pattaya are secondary recommendations for U.S. exporters. Direct contact with Airlines' catering department is also recommended.

Best Market Prospects

Best market prospects for U.S. suppliers in this sector include U.S. beef, turkey, seafood such as U.S. fish (halibut, king salmon, cod), Alaska king crab, scallops, mussels, and oysters, spices, seasonings and sauces, baking products, canned foods (soup, fruit and vegetables), dairy products (cheese, cheese spread, cream cheese, whipped cream, sour cream, cheese dip, ice-cream, dips), fresh fruits and vegetables (apples, grapes, cherries, blueberries, grapefruits, oranges), frozen berries, pie fillings, frozen peas, fruit juice (apple, prune, orange, grape, sparkling white grape), jam and jelly, nuts (walnuts, hazel nuts, macadamia nuts), dried fruits, pickles, ready-to-mix pancakes, cookies, muffins and cake, syrup, vinegar, wine and whisky.

Further information on this market sector is available in Thailand's Food Service - Hotel Restaurant Institutional Sector Report.

Food Processing Sector

Thailand's food processing industry has developed rapidly over the past decade and is one of the most developed in South East Asia. Additionally, Thailand is a leading supplier of a wide variety of commodities and products including rice, rubber, cassava, sugar, seafood, poultry meat, frozen and ready-to-eat foods, and processed fruits and vegetables. Thailand has more than 10,000 food and beverage processing factories consisting of small, medium, and large scale plants. Most of these factories, which are small to medium size, serve the domestic market with medium to large food processors tending to produce higher-value products for both the domestic and export market.

Thailand's food processing sector is heavily export-oriented with more than 50 percent of production sold outside the country. Because of this, Thai food manufacturers seek high-quality food ingredients at reasonable prices. The United States is considered to be a world leader in food ingredient technology and one of the major food ingredient suppliers to the world. In this market, U.S. suppliers should focus their attention on new functional food ingredients, flavors, and other ingredients that promote the health and wellness benefits in foods.

Thailand imported food ingredients were valued at U.S. $2.2 billion in 2016. Although domestic producers have the largest market share of the ingredients sector, the local produced food ingredients tend to be of low-value, raw and semi-processed such as grains, vegetable oils, and starches. High-value ingredients as well as ingredients dependent on high tech processes are generally not available locally and must be imported, providing an opportunity for U.S. exporters. The food ingredient market continues to grow due increasing population and purchasing power in both Thailand and the region.

Demand for food products is shifting away from unprocessed foods found in fresh markets to a wider array of processed foods available in large supermarkets. Thailand's exposure to international food products has led to significant changes in attitudes and consumption patterns. Moreover, the rapid urbanization and the growing number of women in the workforce have also increased demand for processed foods and ready-to-eat meals. Frozen food products, particularly frozen ready-to-eat meals, desserts, and seafood show the biggest growth. As a result, retail food outlets are increasing their product lines of ready-to-eat food products that are normally found in convenience stores like 7-Eleven, Family Mart, and Lawson 108. Demand for these ready-to-eat products is also fueling interests in western processed food products as they are perceived as being higher quality than domestically processed food.

The snack food market is another market that is considered to be highly competitive with major companies being the leaders in each type of snack. For example, Frito-Lay Co., Ltd. is the market leader in potato chips; P.M. Food Co., Ltd is the leader in fish snacks under the "Taro" brand; and Tao Kae Noi is the market leader for crispy seaweed snacks. According to Nielson research, the market value of snack market was U.S. $900 million in 2016, with a growth rate of 4.6 percent. Due to intense market competition and rising demand for processed foods, Thai food processors continue to look for food ingredients that are not locally available in order to develop new products to stimulate sales and create brand recognition among consumers. Most of the snack market growth has come through modern trade channels as snack sales traditional trade channels have been declining.

The Thai health food sector shows signs of growth due to a strong desire among Thai consumers to maintain a healthy lifestyle. As a result, there is growing awareness of functional ingredients such as herbs, fibers, collagen, L-carnitine, minerals, vitamins, omega fatty acids, and probiotics. Consumers are increasingly researching foods and drinks before purchasing them focusing on their health characteristics. Sales of health and wellness products reached U.S. $5.1 billion in 2016. The total market value for the ready-to-drink fruit juice market in 2016 was approximately U.S. $41 billion, with total consumption estimated at 345 million liters. The premium ready-to-drink fruit juice market in

2016 valued at U.S. $153 million, 7 percent higher than the previous year.

Rising demand for health and functional food products has caused Thai food manufacturers to focus on developing new functional food and beverage products. Consumers are constantly looking for more product variety and new flavors, which have encouraged market growth. For example, the Malee brand has launched multiple new fruit juices flavors to appeal to trendy health-conscious consumers. Similarly, the Tipco brand launched "Tipco Plus Collagen" in March 2017 and "Tipco Beat" high-protein drinks made from yellow pea extract in August 2017 to reach consumers focused on skin and body health. Cereal and non-dairy alternative drinks including almond milk have gained market share appealing to vegetarians, health-conscious consumers, and those with lactose or gluten allergies. The market value of non-dairy alternative drinks in 2016 was approximately U.S. $10 million, a 24.9 percent higher compared 2015. Healthy drinks have grown in popularity particularly among Thai female consumers.

Although domestic ingredients currently hold the largest market share, ingredients such as grains, vegetable oils, and starches tend to be low value, high volume products that are raw or semi-processed. Higher value and further processed products are generally not available locally and must be imported. The expected expansion of the food processing industry should provide many export opportunities for U.S. food ingredient exporters in the medium and long term.

Entry Strategy

The most effective way for U.S. food ingredients exporters to enter this market segment is either to appoint a reputable and experienced local importer/distributor or to contact food manufacturers directly. Local firms usually have a good understanding of the market and know how to make direct contact with food manufacturers, government officials, and other key contacts. A good local importer/distributor can also provide valuable support in arranging meetings with the manufacturers especially their R&D and manufacturing divisions, translating technical information, and arranging other marketing and sales activities. Trade shows are also highly effective ways to promote new food ingredient products. Food Ingredients Asia, a well-attended food trade show, will be held in Thailand again in 2019.

U.S. agricultural cooperators (non-profit U.S. agricultural trade organizations) are active in Thailand and other Southeast Asia countries. These groups offer many marketing opportunities for U.S. firms, including trade team visits, technical seminars, local promotional events, and other activities. Cooperators with active programs in Thailand and other regional countries include the U.S. Grains Council, the U.S. Meat Export Federation, the U.S. Poultry & Egg Export Council, the U.S. Dry Pea and Lentil Council, the U.S. Dairy Export Council, the California Raisin Administrative Committee, the U.S. Wheat Association, the U.S. Soybean Export Council, the U.S. Potato Board, and various U.S. fruit and nut associations, as well as several state and regional groups such as Western United States Agricultural Trade Association (WUSATA), Southern United States Trade Association (SUSTA), and the Food Export Association of the Midwest USA.

Best Market Prospects

The best market prospects for the food processing sector include: dried fruits and nuts, wheat, starches, dehydrated potatoes, soybeans, food additives, colorings, flavorings, starch, meat, whey, milk powder, juice concentrates, and other baking ingredients. Products that can substitute for traditional ingredients, such as preservative-free ingredients that provide extended shelf life and nutrient/functional ingredients have strong potential. Thai consumers prefer new foods that are healthy, flavor-intensive, and palate-pleasing. Food ingredients that maximize flavor and healthful benefits will continue to experience growth.

Distribution System

Ingredients for processing are generally distributed through two channels. The first is through traditional importers, who re-sell to local distributors or distribute through their own marketing and delivery networks to end-users. As Thailand's food processing industry has grown and become more sophisticated over the past decades, food manufacturers are increasingly importing directly from foreign suppliers. This is especially true for large, integrated food processors, which are familiar with doing business internationally.

Further information on this market sector is available in Thailand's Food Processing Sector Report

Section IV. Tariff

	PRODUCT	HARMONIZED CODE	QUOTA	TARIFF RATE (for USA)	
				(%)	Volume
1	BEEF (Fresh and Frozen)*	0201		50	
		0202			
2	BEEF OFFALS*	020610		30	
3	PORK MEAT	020329		30	
4	MEAT OF SHEEP/LAMB	0204		30	
5	TURKEY	020724-020727		30	
6	SALMON,TUNAS,COD,SARDINES	0303		5	
	MACKEREL AND OTHER FISH				
7	CRABS	030614		5	
8	SCALLOPS	030721		5	
		030729			
9	SKIMMED MILK	0402	X	5 (in-quota)	
				216 (out-quota)	
10	CHEESE & CURD	0406		30	
11	DRIED PEAS, BEANS,LENTILS	0713		5	
12	ALMONDS, FRESH/DRIED	080211		10	Bt.8.50/kg
	IN SHELL & SHELLED	080212			
13	PISTACHIOS, FRESH/DRIED	080250		10	Bt.8.50/kg
14	ORANGE	080520		40	Bt.33.50/kg
15	GRAPEFRUIT, FRESH/DRIED	080540		40	Bt.33.50/kg
16	GRAPES, FRESH	080610		30	Bt.25.00/kg
17	RAISINS	080620		5	Bt.4.00/kg
18	APPLE (FRESH)	080810		10	Bt.3.00/kg
19	PEARS & QUINCES	080830		30	Bt.15.00/kg
20	CHERRIES (FRESH)	0809.29		40	Bt.33.50/kg
21	PEACHES, INCL NECTARINES	080930		40	Bt.33.50/kg
22	PLUMS AND SLOES	080940		40	Bt.33.50/kg
23	COFFEE	0901	X	30 (in-quota)	
				90 (out-quota)	

Remark:

*Inspection fee by Livestock Department is equal to Baht 7/kg. for uncooked meat (Effective on October 17, 2016)

** More information on tariff reduction on seafood products is avialble in Gain Report: U.S. Exporters to Benefit from Import Tariff Reductions on Seafood

	PRODUCT	HARMONIZED CODE	QUOTA	TARIFF RATE (for USA)	
				(%)	Volume
24	Popcorn kernels (for popping purpose)	10059010			Bt 2.75/kg
	"Already-pop" popcorn	1904.10.90		20	
	Microwave popcorn	2008.19.90		30	
25	SAUSAGES	1601		30	
26	SUGAR CONFECTIONERY	170410		30	
		170490			
27	CHOCOLATE & FOOD PREP. WITH COCOA	1806		10	
28	MILKFOOD FOR INFANTS	190110		30	
29	BREAKFAST CEREAL	190410		20	
30	FROZEN FRIES	200410		30	Bt.25.00/kg
31	JAMS, FRUIT JELLIES	2007		30	Bt.25.00/kg
32	PEANUTS	200811		30	Bt.25.00/kg
33	ALMOND (ROSTED)	200819		30	Bt.25.00/kg
34	CANNED PEACH	200870		30	Bt.25.00/kg
35	FRUIT & VEG JUICE	2009		30	Bt.10/l.
36	INSTANT COFFEE	210111	X	40 (in-quota)	
		210112		49 (out-quota)	
37	INSTANT TEA	210120		30	
38	TOMATO KETCHUP	210320		30	
39	MUSTARD	210330		30	
40	OTHER SAUCES & PREP	210390		5	
41	SOUPS & BROTHS & PREPARATION	210410		20-30	
		210420			
42	BEER	2203		60	
43	CHAMPAGNE	220410		54	
44	WINE	220421		54	
		220429			
46	WHISKIES	220830		60	
47	GIN	220850		54	
48	DOG&CAT FOOD	230910		9	

Section V. Key Contacts & Further Information

A) The U.S. Department of Agriculture's Foreign Agricultural Service office in Bangkok maintains current information covering food and agricultural import opportunities in Thailand and can facilitate U.S. exports and entry to the Thai market. Questions or comments regarding this report should be directed to following:

Local:
Office of Agricultural Affairs
U.S. Embassy
120-122 Wireless Road
Bangkok 10330 Thailand
Tel: 662-205-5106
Fax: 662-255-2907
E-mail: agbangkok@fas.usda.gov
Website: www.fas.usda.gov

U.S. Mail:
Office of Agricultural Affairs
U.S. Embassy, Box 41
APO AP 96546

B) U.S. Cooperator groups
Feel free to contact the U.S. non-profit trade organizations, also known as "Cooperators" that represent specific U.S. agricultural commodities. These organizations can help you conduct market development activities that promote various U.S. commodities and high value products in Thailand and other Asian markets. Please note, some of these organizations are located in Thailand, but some have regional responsibilities with offices in neighboring countries, such as Singapore. The following are some of the "Cooperators" who are responsible for the Thai market:

California Milk Advisory Board
At Success Marketing Co., Ltd.
7th Floor, Room 7-01,
Ploenchit Center
2 Sukhumvit Road, Klongtoey
Bangkok 10110 Thailand
Tel: (662) 656-7921
Fax: (662) 656-7931
Email: theeravee@successmarketing.co.th

California Table Grape Commission
48 Toh Guan Road East
#02-129 Enterprise Hub
Singapore 608586

Tel: 65-6515-6113
Fax: 65-6278-4372
E-mail: Richelieu@lieumktg.com.sg

Cotton Council International (Thailand)
2 Soi Farm Wattana,
Phrakanong, Klongtoey,
Bangkok, 10110 Thailand
Tel: 662-253-8604
Fax: 662-381-1437
Email: kraipob@pangsapa.com

Cotton Incorporated
2 Soi Farm Wattana,
Phrakanong, Klongtoey,
Bangkok, 10110 Thailand
Tel: 6689-030-3380
Fax: 662-381-1437
Email: kraipob@pangsapa.com

Northwest Cherry Board
208 Ram-Inthra Soi 19, Ram-Inthra Road
Bankhen, Anusao-waree
Bangkok 10220, Thailand
Tel. 662-521-2170
Fax. 662-970-8208
E-mail: pt@tatch.in.th

Raisin Administrative Committee
48 Toh Guan Road East
#02-129 Enterprise Hub
Singapore 608586
Tel: 65-6515-6113
Fax: 65-6278-4372
E-mail: Richelieu@lieumktg.com.sg

U.S. Meat Export Federation
627A, Aljunied Road
04-04, Biztech Centre
Singapore 389842
Contact: Ms. Sabrina Yin, Regional Director
Email: singapore@usmef.com.sg
Tel: 65-6733-4255
Fax: 65-6732-1977

USA Poultry & Egg Export Council
#15-04 Liat Towers
541, Orchard Road Singapore 238881
Contact: Ms. Margaret Say, Regional Director
Email: usapeec_sing@pacific.net.sg
Tel: 65-6737-1726
Fax: 65-6737-1727

U.S. Dairy Export Council
Agribusiness-Connect Asia
1 North Bridge Road, #06-10
High Street Centre,
Singapore 179094
Tel: +65 6334 7030
Fax: +65 6223 2010
Email: info@dairyconnect.biz
Contact: Dalilah Ghazalay (Dali) Regional Director, Southeast Asia-U.S. Dairy Export Council

U.S. Dry Pea & Lentil Council
No. 416, 4th Fl., Ambassador's Court
76/1 Soi Langsuan
Ploenchit Road
Bangkok 10330
Tel. 662-251-8655/6, 251-8669, 251-8772
Fax 662-251-0390
E-mail: agsource@loxinfo.co.th

U.S. Soybean Export Council
Thailand Representative
59/43 Baan Klangmuang
Ladprao 71 Road
Bangkok 10230
Tel. 662-539-5373, 539-5332
Fax 662-539-5256
E-mail: asathai@loxinfo.co.th

United States Potato Board
2 Soi Farm Wattana,
Phrakanong, Klongtoey,
Bangkok, 10110 Thailand
Tel: 662-253-8604
Fax: 662-381-1437
Email: kraipob@pangsapa.com

Washington Apple Commission
At Success Marketing Co., Ltd.
7th Floor, Room 7-01,
Ploenchit Center
2 Sukhumvit Road, Klongtoey
Bangkok 10110 Thailand
Tel: (662) 656-7921
Fax: (662) 656-7931
Email: tulip@successmarketing.co.th

C) American Chamber of Commerce in Thailand
The American Chamber of Commerce in Thailand serves as point of contact and exchange for members of the American business community. The Chamber has an active Food & Agribusiness Committee, which represents member firms on issues concerning food, agriculture, and agribusiness. The Committee also promotes a dialogue on these issues between the American food and agricultural community and Thai decision-makers in the public and private sectors.

7th Fl., GPF Witthayu
Tower A, 93/1 Wireless Road,
Lumpini, Pathumwan,
Bangkok 10330
Tel: 662-254-1041
Fax: 662-251-1605
E-mail: info@amchamthailand.com
Key Contact(s): Judy Benn, Executive Director

D) Thai Government
These are the major regulatory government agencies that deal with food and agricultural products.

Thai Food & Drug Administration, Ministry of Public Health:

Import License, Product Registration & Label Approval
Food Bureau
Tivanont Road, Muang
Nonthaburi 11000
Tel: 662-590-7178
Fax: 662-591-8460
E-mail : food@fda.moph.go.th

Food Products from Animals
Tivanont Road, Muang
Nonthaburi 11000
Tel: 662-590-7207/8

E-mail: food@fda.moph.go.th

Food Products from Plants
Tivanont Road, Muang
Nonthaburi 11000
Tel: 662-590-7023
E-mail: food@fda.moph.go.th

Chemicals and Food Additives
Tivanont Road, Muang
Nonthaburi 11000
Tel: 662-590-7209, 590-7219
E-mail: food@fda.moph.go.th

Food for Special Purposes and Food Supplements
Tivanont Road, Muang
Nonthaburi 11000
Tel: 662-590-7205, 590-7098
E-mail: food@fda.moph.go.th

Other Food Products
Tivanont Road, Muang
Nonthaburi 11000
Tel: 662-590-7220
E-mail: food@fda.moph.go.th

Food Inspection
Import and Export Inspection Bureau
Tivanont Road, Muang
Nonthaburi 11000
Tel. 662-590-7323
Fax 662-591-8477
E-mail: inspection@fda.moph.go.th

Department of Foreign Trade, Ministry of Commerce:

Import Control
Commodity Trade Division
Sanam Bin Nam-Nonthaburi Road
Nonthaburi 11000
Tel: 662-547-4737
E- mail: cdtdft@moc.go.th

Commodity Division

Sanam Bin Nam-Nonthaburi Road
Nonthaburi 11000
Tel: 662-547-4801

Grain Division
Sanam Bin Nam-Nonthaburi Road
Nonthaburi 11000
Tel. 662-547-4820

Ministry of Agriculture and Cooperatives

Department of Livestock Development (DLD):

Animal Quarantine Inspection Services
Phyathai Road
Bangkok 10400
Tel. 662-653-4444 Ext. 4110
Fax 662-653-4865
E-mail: dcontrol8@dld.go.th

Bangkok Seaport Animal Quarantine Station
Klong Toey Port
Bangkok 10110
Tel. 662-249-2112
Fax 662-249-4358

Bangkok Airport Animal Quarantine Station
Suvarnabhumi Airport
Bangkok
Tel: 662-134-0731-2
Fax: 662-134-0733

Department of Fisheries (DOF):
Marine Animals
Chief of Fisheries Administration & Management Section
Fisheries Resources Conservation Division
Kasetsart University, Chatuchak
Bangkok 10900
Tel: 662-562-0600/15 Ext 3509
Fax: 662-562-0528
E-mail: fishtradeins@dof.thaigov.net

Department of Agriculture (DOA):
Plant Quarantine Subdivision

Agricultural Regulatory Division
Chatuchak, Bangkok 10900
Tel: 662-940-6573, 940-6670 Ext. 108
Fax: 662-579-4129
E-mail: ard@doa.go.th

National Bureau of Agricultural Commodity and Food Standards (ACFS):
Thailand SPS Enquiry Point
50 Phaholyothin Road, Ladyao Chatuchak
Bangkok 10900.
Tel. 662 561 4204
Fax 662 561 4034
E-mail: spsthailand@gmail.com

Excise Department, Ministry of Finance
License of Alcoholic Beverages
License Subdivision
Bureau of Tax Administration 1
Excise Department
1488 Nakhon Chaisri Road
Bangkok 10300
Tel: 662-243-0525

Department of Intellectual Property, Ministry of Commerce
Application for Patent and Trademark
Services and Information Division
Department of Intellectual Property
338 Rachadapisek Road
Huay Kwang, Bangkok 10320
Tel: 662-275-4854
Fax: 662-276-0061

Customs Department, Ministry of Finance
Import Formalities Division
Klong Toey, Bangkok 10110
Tel: 662-249-4266, 671-5250
Fax: 662-249-4297

Legal Affairs Bureau
Klong Toey, Bangkok 10110
Tel: 662-671-7560 Ext. 9310, 9311
Fax: 662-671-7626

Appendix I. Statistics

Table A. Key Trade and Demographic Information	
Agricultural Imports From All Countries ($Mil) / U.S. Market Share (%)	$11,227 Mil/15.32 %
Consumer Food Imports From All Countries ($Mil)/U.S. Market Share (%)	$4,621 Mil/8.90%
Edible Fishery Imports From All Countries ($Mil) / U.S. Market Share (%)	$2,909 Mil/5.91%
Total Population (Millions) / Annual Growth Rate (%)	65.93 Mil/0.31%
Urban Population (Millions) Annual Growth Rate (%)	35.48 Mil/2.62%
Number of Major Metropolitan Areas	21 provinces
Size of the Middle Class (Millions) / Growth Rate (%)	37.9 Mil/1.50%
Per Capita Gross Domestic Product (U.S. Dollars)	$6,035
Unemployment Rate (%)	1.00%
Per Capita Food Expenditures (U.S. Dollars)	$742
Percent of Female Population Employed	45%
Exchange Rate (2016)	US$1=35.30
Source: Global Trade Atlas and USDA Bangkok, Thailand	

Table B. Consumer Food & Edible Fishery Product Imports

Thailand Imports	Imports from the World			Imports from the US			U.S. Market Share		
(In Thousands of Dollars)	2014	2015	2016	2014	2015	2016	2014	2015	2016
CONSUMER-ORIENTED AGRICULTURAL TOTAL	4,303,629	4,403,476	4,620,756	413,668	408,856	411,234	9.61	9.28	8.90
Snack Foods (Excl. Nuts)	281,607	281,086	316,916	8,912	13,920	17,764	3.16	4.95	5.61
Breakfast Cereals & Pancake Mix	42,339	42,666	49,989	1,420	1,447	1,567	3.35	3.39	3.14
Red Meats, Fresh/Chilled/Frozen	131,345	163,165	122,452	2,995	3,150	3,437	2.28	1.93	2.81
Red Meats, Prepared/Preserved	29,305	22,819	29,354	1,811	1,845	1,767	6.18	8.08	6.02
Poultry Meat	16,430	7,378	5,579	1,903	159	385	11.58	2.15	6.91
Dairy Products (Excl. Cheese)	808,942	574,695	445,955	64,727	38,359	27,536	8.00	6.67	6.17
Cheese	60,018	56,564	65,325	4,300	5,361	5,813	7.16	9.48	8.90
Eggs & Products	21,834	23,458	22,088	1,173	850	311	5.37	3.62	1.41
Fresh Fruits	498,471	623,462	683,352	38,607	37,690	33,166	7.75	6.05	4.85
Fresh Vegetables	179,385	203,475	221,278	2,470	3,410	1,244	1.38	1.68	0.56
Processed Fruit & Vegetables	434,274	595,622	739,663	42,217	42,792	46,576	9.72	7.18	6.3
Fruit & Vegetable Juices	66,385	63,742	74,272	8,611	8,702	9,021	12.97	13.65	12.15
Tree Nuts	137,577	172,310	192,053	21,403	27,514	32,956	15.56	15.97	17.16
Wine & Beer	75,957	70,520	67,716	4,017	4,824	3,661	5.29	6.84	5.41
Nursery Products & Cut Flowers	18,655	20,984	30,507	90	39	57	0.48	0.19	0.19
Pet Foods (Dog & Cat Food)	50,423	60,400	53,715	10,995	11,228	9,440	21.81	18.59	17.57
Other Consumer-Oriented Products	1,450,683	1,421,129	1,500,542	198,018	207,569	216,534	13.65	14.61	14.43
FISH & SEAFOOD PRODUCTS	2,635,176	2,406,072	2,908,931	213,332	155,639	171,972	8.10	6.47	5.91
AGRICULTURAL PRODUCTS TOTAL	11,141,973	11,282,310	11,227,278	1,737,771	1,873,083	1,719,968	15.60	16.60	15.32
AG, FISH & FORESTRY TOTAL	14,487,417	14,302,760	14,725,477	1,989,323	2,062,272	1,921,660	13.73	14.42	13.05

Source: Global Trade Atlas and USDA Bangkok, Thailand

Table C. Top 15 Suppliers of Consumer Foods & Edible Fishery Products

CONSUMER-ORIENTED AGRICULTURAL IMPORTS

$1,000	2014	2015	2016
China	853,826	976,168	1,106,258
United States	413,668	408,856	411,234
New Zealand	504,093	412,993	380,993
Singapore	273,869	294,318	290,990
Cambodia	85,461	204,489	280,056
Malaysia	275,060	255,575	254,008
Australia	321,896	269,914	238,740
Vietnam	158,033	198,824	228,600
Indonesia	134,430	165,964	180,805
India	106,778	105,339	137,511
Netherlands	149,398	128,907	132,019
France	122,019	133,691	116,757
Laos	46,156	73,916	102,336
Japan	77,036	76,789	91,300
Germany	92,090	80,102	84,416
Other	655,981	617,631	584,733
World	4,303,629	4,403,476	4,620,756

FISH & SEAFOOD PRODUCTS

	2014	2015	2016
China	354,063	363,677	436,777
Vietnam	181,403	218,672	252,733
Taiwan	247,052	200,158	248,101
India	102,460	132,329	183,199
United States	213,332	155,639	171,972
South Korea	74,401	87,349	145,630
Norway	115,690	106,719	141,713
Japan	175,556	156,411	134,053
Indonesia	205,949	119,771	130,363
Papua New Guinea	73,201	100,919	123,049
Kiribati	40,378	84,790	91,735
Myanmar	25,887	20,464	81,628
Chile	101,584	77,531	80,717
Pakistan	48,659	52,071	57,270
Malaysia	22,136	32,172	51,847
Other	653,425	497,398	578,143
World	2,635,176	2,406,072	2,908,931

Source: Global Trade Atlas and USDA Bangkok, Thailand

Table D. Economic Projection 2017 and 2018

Economic Projection 2017 and 2018	Actual Data		Projection		
	2015	2016	2017		2018
			Aug 21, 2017	Nov 20, 2017	Nov 20, 2017
GDP (at current price: Bil.USD)	399.2	407.1	440.2	448.7	471.4
GDP Growth (at constant price, %)	2.9	3.2	3.5-4.0	3.9	3.6-4.6
Investment (at constant prices, %)	4.4	2.8	3.4	2.0	5.5
Private (at constant prices, %)	-2.2	0.4	2.2	2.2	3.7
Public (at constant prices, %)	29.3	9.9	8.0	1.8	11.8
Private Consumption (at constant prices, %)	2.2	3.1	3.2	3.2	3.1
Public Consumption (at constant prices, %)	3.0	1.7	3.2	2.0	2.7
Export volume of goods&services (%)	0.7	2.1	4.9	6.1	5.3
Export value of goods (Bil.USD)	214.0	214.3	226.3	232.7	244.3
Growth rate (%)	-5.6	0.1	5.7	8.6	5.0
Growth rate (Volume, %)	-1.5	0.5	3.2	5.5	4.0
Import volume of goods&services (%)	-	-1.4	5.6	6.5	5.6
Import value of goods (Bil.USD)	187.2	177.7	197.4	200.8	214.9
Growth rate (%)	-10.6	-5.1	10.7	13.0	7.0
Growth rate (Volume, %)	0.3	-2.5	6.2	7.9	5.5
Trade balance (Bil.USD)	26.8	36.5	28.9	31.9	29.4
Current account balance (Bil.USD)	32.1	48.2	42.5	46.5	38.1
Current account to GDP (%)	8.1	11.9	9.7	10.4	8.1
Inflation (%)					
CPI	-0.9	0.2	0.4-0.9	0.7	0.9-1.9
GDP Deflator	0.6	1.8	1.5-2.5	2.3	2.0-3.0

Source: Office of the National Economic and Social Development Board, 20 November 2017

Table E. Exchange Rate (2011-2016)						
Exchange Rates						
(Baht per unit of US Dollar annual average)						
	2011	**2012**	**2013**	**2014**	**2015**	**2016**
US$	30.49	31.08	30.73	32.48	34.25	35.30
Source: Bank of Thailand						

End of Report.