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GAIN Report

Global Agricultural Information Network

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Thailand

Retail Foods

2017

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Report Highlights:

In 2016, Thailand had total retail sales of U.S. \$88.2 billion, representing approximately 22 percent of total GDP. Of the U.S. \$88.2 billion in retail sales, U.S. \$83.5 billion came from store-based retailing with the remaining U.S. \$4.7 billion coming from non-store retailing (direct sales, home shopping, and internet retailing). Total food retail sales reached U.S. \$52.1 billion comprising 59 percent of all retail sales. Overall, the retail sector grew by 4 percent in 2016.

Post:

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Executive Summary:

In 2016, Thailand had total retail sales of U.S. \$88.2 billion, representing approximately 22 percent of total GDP. Of the U.S. \$88.2 billion in retail sales, U.S. \$83.5 billion came from store-based retailing with the remaining U.S. \$4.7 billion coming from non-store retailing (direct sales, home shopping, and internet retailing). This represents 4 percent growth in retail sales since 2015. For store-based retail sales, U.S. \$52.1 billion (62.4 percent) came from food retail sales while U.S. \$31.4 billion (37.6 percent) came from non-food retailing. In 2016, the value of Thailand's consumer-oriented food product imports reached U.S. \$4.6 billion, with imports from the United States valued at U.S. \$411 million (9 percent) of all consumer oriented imports.

Despite the growth in retail sales, 2016 presented several challenges for the retail sector. Consumer confidence continued to decline from 2015, and low agricultural prices affected household income for agricultural workers. Additionally, regulations limiting "zero-dollar scam" tour operators caused the number of tourists particularly from China to decline. However, Thai retailers were able to adapt by expanding more stores in provincial areas and using marketing campaigns including special discounts to induce shoppers to shop. In addition, the government implemented an economic stimulus policy that allowed Thai consumers to reduce their income tax by submitting receipts for food (not including spirits and cigarettes), hotels, restaurants, and other retailers that provided VAT receipts. The government's stimulus policy lasted from November 11, 2017 to 3 December 2017.

In 2017, Thailand's Gross Domestic Production (GDP) is forecast to grow at 3.5 - 4 percent compared to 3.2 percent in 2016 with per capita income expected to rise to U.S. \$6,506, a 7.8 percent increase from 2016. The economic growth in 2017 is being driven by many different factors including higher prices for agricultural products, increased exports, increased number of tourists, and government spending on infrastructure projects. Many analysts expect that the government's infrastructure projects will increase business confidence further stimulating private investment.

Thailand Country Facts:

Area: 514,000 square kilometers (sq.km.)

Population: approximately 68 million people

Demographic and Economic Indicators

| | 2013 | 2014 | 2015 | 2016 | 2017 (Data Current as of October) |
|------------------------------------|------------|------------|------------|------------|-----------------------------------|
| Inflation (% change) | 2.2 | 1.9 | -0.9 | 0.2 | 0.4-0.9 |
| Exchange rate (per U.S. \$) | 30.72 | 32.49 | 34.25 | 35.29 | 34.49 |
| GDP (% real growth) | 2.8 | 0.9 | 2.8 | 3.2 | 3.5-4.0 |
| GDP (Baht millions) | 12,921,166 | 13,203,739 | 13,672,865 | 14,366,557 | 15,257,300 |
| GDP (U.S. \$ millions) | 420,661 | 406,442 | 399,128 | 407,062 | 448.80 |

| | | | | | |
|---|---------|---------|---------|---------|-------|
| Per Capita Income (U.S. \$) | 5,920 | 5,733 | 5,937 | 6,035 | 6,633 |
| No. of households (thousands) | 21,972 | 22,472 | 22,946 | 23,389 | n.a |
| Consumer Expenditure (U.S. \$ millions) | 246,434 | 237,482 | 234,162 | 236,348 | n.a |
| Consumer Expenditure per household (U.S. \$) | 11,216 | 10,568 | 10,205 | 10,105 | n.a |
| Consumer Expenditure on Food and Non-Alcoholic Beverages per household (U.S. \$) | 2,772 | 2,669 | 2,544 | 2,530 | n.a |
| Consumer Expenditure on Alcoholic Beverages and Tobacco per household (U.S. \$) | 379 | 364 | 346 | 341 | n.a |
| Urban population ('000) | 32,656 | 33,629 | 34,570 | 35,476 | n.a |
| No. of tourists (millions) | 26.6 | 24.8 | 29.9 | 32.6 | 28.8 |

Sources: Euro Monitor International, Office of the National Economic and Social Development Board (NESDB), Ministry of Tourism and Sports

Thailand's economy is expected to grow by 3.5 – 4 percent in 2017, compared to 3.2 percent growth in 2016. According to the Thai Office of the National Economic and Social Development Board (NESDB) and the Bank of Thailand, in 2017 per capita income is forecast to rise to U.S. \$6,633, an increase of 7.8 percent from the previous year. Per capita income is being positively affected by the increases of Thai exports, large government expenditures on infrastructure projects, higher agricultural prices raising farmer household incomes, and large numbers of tourists. Historically, consumer expenditure per household average about U.S. \$10,000 in which approximately 25 percent is spent on food and non-alcoholic beverages and 3.5 percent is spent on alcoholic beverages and tobacco. Thus rising per capita income should translate into higher food and beverage sales.

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.

As a result of government zoning regulations, limited real estate availability in prime locations, and the high cost of land, the-rate of new retail store openings in central Bangkok has slowed. However, retailers have increased investment into opening new retail outlets in rural areas. These new stores are being customized to align with local consumer expectations and incomes for each locality.

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.

Retail Sales by Vendor Type

| | 2012 | 2013 | 2014 | 2015 | 2016 |
|--|---|---|---|---|---|
| Store-Based Retailers | 2,546.3 billion baht (U.S. \$81.9 billion) | 2,676.9 billion baht (U.S. \$87.1 billion) | 2,756.9 billion baht (U.S. \$84.9 billion) | 2,836.9 billion baht (U.S. \$82.8 billion) | 2,946.1 billion baht (U.S. \$83.5 billion) |
| Non-Store Retailers (Direct Sales, Home Shopping, Internet) | 138.2 billion baht (U.S. \$4.5 | 147.5 billion baht (U.S. \$4.8 | 150.4 billion baht (U.S. \$4.6 | 157.8 billion baht (U.S. \$4.6 | 167.1 billion baht (U.S. \$4.7 |

| | | | | | |
|--------------------------------|--|--|--|--|--|
| Retailing, and Vending) | billion) | billion) | billion) | billion) | billion) |
| Total Retail Sales | 2,684.5 billion baht (U.S. \$86.4 billion) | 2,824.4 billion baht (U.S. \$91.9 billion) | 2,907.3 billion baht (U.S. \$89.5 billion) | 2,994.7 billion baht (U.S. \$87.4 billion) | 3,113.2 billion baht (U.S. \$88.2 billion) |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Note: Non-Store Retailing includes Direct Selling, Home Shopping, Internet Retailing, and Mobile Internet Retailing

Retail Sales: Percent Growth 2013-2016

| | 2013 | 2014 | 2015 | 2016 | Average Growth |
|------------------------------|------|------|------|------|----------------|
| Store-Based Retailers | 5.1 | 3.0 | 2.9 | 3.8 | 3.7 |
| Non-Store Retailers | 6.7 | 2.0 | 4.9 | 5.9 | 4.9 |
| Total Retail Sales | 5.2 | 2.9 | 3.0 | 4.0 | 3.8 |

Note: Valuations based on Thai Baht to avoid exchange rate fluctuations

Food and Non-Food Retail Sales in Store-Based Retailing

| | 2012 | 2013 | 2014 | 2015 | 2016 |
|--|--------------|--------------|--------------|--------------|--------------|
| Store-Based Retail Sales (U.S. \$ billion) | 81.9 (100%) | 87.1 (100%) | 84.9 (100%) | 82.8 (100%) | 83.5 (100%) |
| Store-Based Food Retail Sales (U.S. \$ billion) | 51.6 (63.0%) | 54.7 (62.8%) | 53.2 (62.7%) | 51.8 (62.6%) | 52.1 (62.4%) |
| Store-Based Non-Food Retail Sales (U.S. \$ billion) | 30.3 (37.0%) | 32.4 (37.2%) | 31.7 (37.3%) | 31.0 (37.4%) | 31.4 (37.6%) |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Retail Food Sector

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.

In 2016, total store-based food retail sales reached U.S. \$52.1 billion, 62.4 percent of total store-based retail sales. By number of establishments, convenience stores dominate with 14,847 establishments followed by supermarkets with 492 establishments and then supercenter/ hypermarkets/cash and carry stores with 438 establishments.

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 pre-cut 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.

Top priorities for this sector are to improve and modernize existing stores. Retailers have been experimenting with different store formats to better meet urban customer needs such as building smaller-sized stores to serve consumers who like to shop near their home. Food retailers also look for ways to compete through new innovative channels. For example, many retailers have launched their own mobile applications for marketing to promote products and directly communicate with consumers. In addition, retailers will continue to maintain a focus on more effectively serving their core customer base through strategic initiatives that include store layout enhancements, expansions, and improving product assortments in line with market demand trends

Summary of Retailer Categories and Goals/Strategies

| Goal/Strategy | Hypermarket | Cash and Carry | Supermarket | Convenience Store |
|---|--|--|---|---|
| Type of products sold | Consumer goods, basic quality | Consumer goods, fresh foods | Consumer goods, fresh foods, prepared foods | Consumer goods, prepared foods, small size |
| Target customers | Lower-middles | Small retailers, customers who buy in bulk and HRI | Middle-upper | Those favoring convenience |
| Stock Inventory | 30-45 days | 1 month | 10-15 days | 15-20 days |
| Price Strategy | Low price/wholesale price | Wholesale price | Mixed pricing | Higher than hypermarkets, cash and carry and supermarkets |
| Other strategies | Membership card, credit cards, aggressive expansion of outlets, and frequent discounts | Membership card | Membership card, promotions, and discounts | Aggressive expansion of outlets |
| Retail sales area square meters) | 4,000-12,000 | 5,500-12,000 | 1,000-3,000 | 16-100 |
| Key Player | Tesco Lotus, Big C | Siam Makro | Tops, Home Fresh Mart, Foodland, MaxValu | 7-Eleven, Family Mart, Lawson 108 |

Source: Thai Development Research Institute, Krungsri Research

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, consumer preferences, and how best to market new products. Intense competition in the retail food market, particularly from large-scale modern companies that use pricing strategies to attract low income consumers has caused the closure of many traditional food stores. Thailand’s hypermarket sector is dominated by two large companies, which gives them increased bargaining power with suppliers. The convenience sector is not considered to be an attractive channel for U.S. products, as these stores mostly rely on locally and regional produced goods due to their lower prices.

Traditional “mom and pop” stores and wet markets in Thailand are not ideal entry points for U.S. exporters primarily due to their price sensitivities and preference for traditional foods. 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, but produced domestically or in neighboring Asian countries.

Most retailers have recently modified their marketing strategies by expanding their private label product offerings, instituting monetary promotions, discounts, cashback programs, and creating loyalty programs through membership cards in order to attract new customers and maintain market share. The Kasikornthai Research concludes that the total value of private label or house brands in 2015 is about U.S. \$831 million. 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 juice. Private label products provide good sourcing opportunities for U.S. food ingredients, although some U.S. ingredients such as dried fruits, are not competitive as a result of free trade agreements (FTAs) Thailand has signed with neighboring Asian countries like China, Vietnam, Malaysia, etc. Nonetheless, margins on private label products for retailers are double that of branded products and have grown in popularity due to the ability of retailers to price them accordingly. For example, Central Food Retail provides a variety of private label choices targeting different consumer groups: the superior quality private label “MyChoice” for ready-to-eat products and specialty products sourced from around the globe (i.e. breakfast food items, cheese, deli meats, frozen meat, dried fruits and nuts); mid-priced products characterized by “Tops”; and budget-end products represented by “My Choice Thai”, “Smarter”, and “Love for Value”. Big C also has its own private label “Big C” for mid-priced dry food, non-food, and fresh food products; while imported food items from France are sold under the brand “Casino” in select Big C Extra stores for high-end consumers. Despite these existing private label products, there are still significant opportunities for growth in this market.

Standard Opening Hours by Retail Channel Type 2015

| Channel | Monday-Thursday | Friday | Saturday | Sunday |
|-------------------------------------|------------------------|---------------|-----------------|---------------|
| Supercenter/ Hypermarket | 6 am – 9 pm | 6 am – 9 pm | 6 am – 9 pm | 6 am – 10 pm |
| Supermarket | 7 am – 9 pm | 7 am – 9 pm | 7 am – 9 pm | 7 am – 9 pm |
| Convenience Store | 9 am – 8 pm | 9 am – 9 pm | 9 am – 9 pm | 9 am – 9 pm |
| Department Store | 10.30 am -9.30 pm | 10 am -10 pm | 10 am -9 pm | 10 am – 9 pm |

Source: Euromonitor International

Retailers in Thailand normally are open every day including weekends and national holidays. There are no laws restricting the days and hours that retailers are allowed to operate. Opening hours for retailers in Thailand vary depending on their location and the nature of their business. Opening hours in urban areas typically are slightly longer than in those rural areas as urban residents tend to finish work later. During holidays or special promotions, outlets may stay open until midnight.

Key Food Retailers in Thailand

| Company Name | Store Format | Ownership | 2016 Sales (U.S. \$ million) | Projected Number of Outlets in Thailand 2017 |
|---|-----------------------------------|--|------------------------------|--|
| Ek-Chai Distribution System Co., Ltd. | | UK | 6,189 | 1,950 |
| <ul style="list-style-type: none"> Tesco Lotus Hypermarket | Hypermarket & Compact Hypermarket | | | 196 |
| <ul style="list-style-type: none"> Lotus Express | Convenience Store | | | 1,522 |
| <ul style="list-style-type: none"> Talad Lotus | Supermarket | | | 232 |
| 7-Eleven – CP All Pcl. | Convenience Store | Thai | 7,925 | 10,000 |
| Siam Makro Pcl. | Cash and Carry | In 2013, CP All acquired Siam Makro from SHV Nederland B.V. Also has operated Makro in Cambodia | 4,800 | 115 |
| Big C Supercenter Pcl. | | France (Berli Jucker Plc (BJC), a TCC subsidiary acquired Big C in March 2016). Also has operated about 200 stores of B's Mart in Vietnam And 23 outlets of M-Point Mart (MPM) in Laos | 3,038 | 825 |
| <ul style="list-style-type: none"> Big C Supercenter (- Big C Extra, and Big C | Hypermarket | | | 141 |

| | | | | |
|---|-------------------|---|-------|-------|
| Supercenter) | | | | |
| • Big C Market | Supermarket | | | 68 |
| • Mini Big C | Convenience Store | | | 616 |
| Central Food Group | | Thai Central has operated Big C Chain in Vietnam | 4,760 | 1,387 |
| • Central Food Hall | Supermarket | | | 8 |
| • Tops Market | Supermarket | | | 93 |
| • Tops Superkoom Retail | Supermarket | In Bangkok area | | 19 |
| • Tops Superkoom Wholesale | Supermarket | | | 4 |
| • Tops Superkoom Tambon | Supermarket | In sub-provincial area | | 66 |
| • Tops Daily | Supermarket | In community/office building/university, 200-300 sqm. (smaller than Superkoom Retail) | | 61 |
| • Tops Superstore | Supermarket | | | 3 |
| • Eatthai | Supermarket | Target to tourists and expats (smallest scale) | | 2 |
| • Central Wine Cellar | Wine Shops | | | 1 |
| • Central Family Mart | Convenient Store | Central Retail Joint Venture with Japan in 2012 | | 1,355 |
| The Mall Group (Home Fresh Mart and Gourmet Market) | Supermarket | Thai | 686 | 20 |
| Foodland Supermarket | Supermarket | Thai | 164 | 20 |
| MaxValu - Aeon (Thailand) Co., Ltd | | Japan | 213 | 88 |

| | | | | |
|------------------|------------------|------|-----|----|
| • MaxValu | Supermarket | | | 35 |
| • MaxValu Tanjai | Mini-Supermarket | | | 53 |
| Villa Market | Supermarket | Thai | 154 | 34 |

Source: Euromonitor, USDA Foreign Agricultural Service - Bangkok, Thailand

Hypermarkets

Zoning restrictions in the 2013 City and Town Planning Act and high land price have made it increasingly difficult to open outlets within communities particularly in Bangkok. As a result, hypermarkets have instead begun to expand outlets in other Thai provinces focusing on larger growing provincial city centers. Hypermarket operators are also diversifying their store formats, opening smaller-scale retail stores including mini-supermarkets and convenience stores to better serve their customers. During the past 2-3 years, the hypermarket segment has seen stiff competition with companies using discounting and price cutting strategies to compete on price sensitive customers. About 90 percent of urban Thai shoppers use hypermarkets at least once a week.

Hypermarkets: Number of Stores 2012-2016

| | 2012 | 2013 | 2014 | 2015 | 2016 | Difference 2015/2016 |
|-------------------------------|------|------|------|------|------|----------------------|
| Tesco Lotus | 146 | 157 | 183 | 188 | 196 | +8 |
| Big C | 113 | 119 | 123 | 125 | 134 | +9 |
| Total Stores | 259 | 276 | 306 | 313 | 330 | +17 |
| Total Stores - Percent growth | | 6.5 | 10.8 | 2.3 | 5.4 | |

Source: Krungsri Research, USDA Foreign Agricultural Service - Bangkok, Thailand

Note: Only two key operators included in this report

The largest two hypermarkets are Tesco Lotus and Big C. In general, hypermarkets offer more than 100,000 stocks keeping units (SKUs) of consumer goods and can vary greatly in size ranging from 4,000 to 12,000 square meters (sqm). As a result, hypermarkets offer a wide variety of products including fresh food, packaged food products and beverages. Typically, food and beverages account for 60 to 65 percent of their total product assortments. Big C and Tesco Lotus have both introduced a new store format called “Extra,” which offers a greater range of premium products including a wide selection of imported products targeting middle and high-income customers.

Big C has three hypermarket formats: Big C Supercenter, Big C Extra, and a wholesale professional-oriented format called Big C Jumbo. Big C Supercenter target customer base is low to middle income consumers while Big C Extra targets middle to high income consumers, offering a wider range of premium, fresh, dry, and imported products. Big C Jumbo use a wholesale membership format targeting hotels, restaurants, caterers, small and medium size retailers, and households that buy in large volumes. Big C Jumbo’s sales are approximately 80 percent food and 20 percent non-food items. Big C Market stores differ by having a supermarket formats that targets low-to-middle income customers. These stores are also smaller ranging between 750 to 2,000 sqm and offer a smaller number of items usually around 10,000 to 15,000 SKUs. Mini Big C stores vary by having a convenience store format to reach low-to-middle income customers. These stores carry around 4,000 SKUs with an average size of 160 sqm with about 90 percent of sales coming from food items.

Tesco Lotus Hypermarket and Tesco Lotus Extra offer between 80,000-100,000 SKUs with around 60-65 percent of total sales coming from food products. The Tesco Lotus Department Store is a more compact hypermarket that offers 60,000-80,000 SKUs with store sizes ranging between 3,000-5,000 sqm while Lotus Express and Tesco-Lotus have smaller store sizes of 300-1,500 sqm and 3,000-40,000 SKUs. Tesco Lotus carries imported products in all their stores with premium products available in Tesco Lotus hypermarkets located in higher income areas.

Cash and Carry

The cash and carry format allows consumers to shop for grocery and non-grocery products in bulk in order to receive significant discounts. Cash and carry establishments target small and medium-sized entrepreneurs, hotels, restaurants, catering (HRC) establishments, institutional food providers, offices, and the food service industry. These stores usually have a store size of 10,000 sqm and carry 12,000 to 15,000 SKUs. About 80 percent of items in cash and carry establishments are food items. Cash and carry establishments in Thailand are mostly positioned towards businesses rather than individual consumers, but this sector is beginning to target individual consumers as well. However, cash and carry outlets tend to not appeal to the majority of individual consumers because they are limited by the large volume purchase requirements. Key business customers of cash and carry establishments are HRC companies and food service providers.

Cash and Carry: Number of Stores 2012-2016

| | 2012 | 2013 | 2014 | 2015 | 2016 | Difference 2015/2016 |
|--|------|------|------|------|------|-------------------------|
| Siam Makro (Cash & Carry, Food Service, Food Shop, and Siam Frozen) | 57 | 64 | 77 | 91 | 108 | +17 |
| Percent growth | | 12.2 | 20.3 | 18.2 | 18.7 | |

Source: Euromonitor, CP All Report

Siam Makro, the first membership-based cash and carry retail store in Thailand, was established in 1988 and registered under the name “Makro.” At the end of 2016, Siam Makro had a total of 108 stores, an increase of 17 stores from the previous year. Siam Makro has more than 3 million members, of which 700,000 are traditional retailers, approximately 500,000 are HRC, and the remaining 1.8 million are categorized as “others”. Traditional retailers comprise of 50 percent of total retail income for Siam Makro with 30 percent coming from HRC and the remaining 20 percent coming from all others.

Siam Makro has developed its own brands to serve professional business operators such as 1) “Aro” for quality products such as rice, seasoning, canned food, cooking oil, pasta, and noodles; 2) “Savepack” for food products at a value price; 3) “M&K” for snacks and drink products for traditional retailers to resell; and 4) “Protect” for home appliances.

Makro operates five different store formats in Thailand including:

- Classic Store: A typical cash and carry format designed to serve professional customers. Store sizes ranging between 5,500-12,000 sqm. Primary customers are small retailers, HRC, and other

institutional business operators,

- Eco Store: This store is designed to serve HRC customers located in tourist areas like Phuket, Samui, and Krabi. The majority of the selling space is dedicated to food products,
- Eco Plus Store: This store is designed to serve food professionals, both HRC and small food retailers. This format is expected to be the main format for future expansion by Siam Makro,
- Siam Frozen Shop: Small stores with approximately 100-150 sqm of space that are positioned as frozen food specialty stores selling mostly frozen products to the HRC customers,
- Makro Foodservice store: A medium sized store format targeting HRC customers - ranging from small street vendors, fine dining restaurants, and 5-star hotels. Makro is increasing the numbers of stores in this format, however, average size of the new stores tend to be small due to limited land space near high-potential tourist destinations or community malls. These stores typically include walk-in fruit and vegetable cold-rooms, a seafood section with live, fresh, and frozen seafood, and a gourmet section for meats, cheeses, bakery, and wines.

Supermarkets

The supermarket business in Thailand is driven by six major competitors: Central Food Retail (Central Food Hall and Tops Market), The Mall Group (Home Fresh Mart and Gourmet Market), Foodland Supermarket, Villa Market, MaxValu Supermarket, and UFM Fuji. This highly competitive segment is concentrated in the Bangkok metropolitan area and in major regional urban centers such as Chonburi, Chiang Mai, Phuket, and Nakorn Rachasima, where most of the middle class consumers are located. Supermarkets offer a wide range of premium products including local and imported processed food, fruits, vegetables, meat, seafood, and beverages.

Supermarket Outlets in Thailand

| Retailers | 2012 | 2013 | 2014 | 2015 | 2016 | Difference 2015/2016 |
|---------------------------------|------|------|------|------|------|-------------------------|
| Tops | 95 | 93 | 85 | 85 | 95 | +10 |
| Home Fresh Mart, Gourmet Market | 13 | 17 | 17 | 18 | 20 | +2 |
| Foodland | 13 | 14 | 16 | 18 | 20 | +2 |
| MaxValu | 14 | 17 | 20 | 23 | 32 | +9 |
| Villa Market | 25 | 30 | 33 | 33 | 34 | +1 |
| Big C Market | 18 | 30 | 37 | 55 | 59 | +4 |
| Lotus-Talad | 165 | 182 | 187 | 192 | 232 | +40 |
| Total | 343 | 383 | 395 | 424 | 492 | +68 |
| Percent Growth | | 11.6 | 3.1 | 7.3 | 16 | |

Source: Krungsri Research, USDA Foreign Agricultural Service - Bangkok, Thailand

Note: Table only includes large supermarket chains

Supermarkets typically have a modern format, a high-quality selection of products, fresh produce items, and high food safety standards to meet the requirements of middle and upper-income customers. Healthy profits for this sector have allowed supermarket retailers to maintain solid rates of expansion.

Convenience Stores

The convenience store sector has experienced high growth taking significant market share from traditional retailers. Competition in this sector is high as Thailand has 14,847 convenience stores nationwide; last year the number of outlets grew by 5.8 percent with 820 stores opening. The leading convenience store chain is 7-Eleven, which accounts for 64 percent of total convenience stores. In 2016, 7-Eleven had 9,542 outlets in Thailand, an increase of 710 stores from 2015. About 44 percent of 7-Eleven outlets are located in the Bangkok metropolitan area, with 56 percent of outlets located in other Thai provinces. CP All, the local operator of 7-Eleven, plans to reach 10,000 stores by 2017 and 13,000 stores by 2021. Food and beverage sales account for 70 percent of all sales for 7-Eleven and Post estimates it is the same for other convenience stores as well. Commonly sold products include drinks, ready-to-eat foods, bakery products, and desserts. Additionally, many convenience stores offer various services such as bill payment, online money refill machines for mobile phones, vending machines, and ATMs. On average, in 2016, a total of 11.7 million customers per day shopped at a convenience store compared with 10.9 million in 2015.

Thai operators of Tesco Lotus Express, Mini Big C, and Tops Daily all operate stand-alone shops and outlets in gas stations in order to compete directly with 7-Eleven. Additionally, there are several joint ventures between foreign investors and Thai companies such as 1) Central's Family Mart; 2) Sahapat's Lawson 108; and 3) Aeon's MaxValue Tanjai increasing competition in this sector.

Number of Convenience Stores in Thailand

| Convenience Stores | 2012 | 2013 | 2014 | 2015 | 2016 | Difference 2015/2016 |
|------------------------------------|--------|--------|--------|--------|--------|-------------------------|
| Stand-alone convenience stores | 9,526 | 10,404 | 11,153 | 11,727 | 12,410 | 683 |
| - 7-Eleven stores | 5,842 | 6,373 | 6,986 | 7,597 | 8,210 | 613 |
| - Others | 3,684 | 4,031 | 4,167 | 4,130 | 4,210 | 80 |
| Convenience stores in gas stations | 1,988 | 2,062 | 2,159 | 2,300 | 2,437 | 137 |
| - 7-Eleven stores | 980 | 1,056 | 1,141 | 1,235 | 1,332 | 97 |
| - Others | 1,008 | 1,006 | 1,018 | 1,065 | 1,105 | 40 |
| Total stores | 11,514 | 12,466 | 13,312 | 14,027 | 14,847 | 820 |
| Percent Growth | | 8.2 | 6.8 | 5.4 | 5.8 | |

Source: CP All Annual Report

Over 90 percent of urban Thai shoppers use convenience stores and regularly visit them, averaging 13 visits per person a month. Average spending per visit is 60 baht (U.S. \$2) which totals 1,428 baht (U.S. \$40) per person per year. Thai society is experiencing multiple demographic transitions resulting in more nuclear families, childless couples, and people living alone. These demographic transitions have been accompanied by changes in the lifestyle and demands of consumers. In the retail food industry, modern Thai consumers today prefer ready-to-eat food and are more likely to purchase fewer items per store visit, and go shopping with increased frequency. Due to their popularity, the Thai convenience store sector has become enormously competitive as CP All's 7-Eleven chain faces growing competition from Tesco Lotus Express, Mini Big C, Tops Daily, Family Mart and Lawson 108. Consequently, convenience store owners have re-focused their sales strategies on food items and added new food product lines, especially ready-to-eat meals. Food and beverages account for 72 percent of total products in convenience stores.

Online Shopping

Each year technology plays a greater role in how consumers make their purchasing decisions. Businesses have begun to adapt by creating digital interactions that engage shoppers outside of retail establishments. For example, it is commonplace for potential shoppers to learn about a company's products and services online from the comfort of their home. In Thailand, food retailers have expanded into online shopping along with other online services. For example, Big C's online shopping platform allows customers to place orders online and receive same-day pick up or 24-hour delivery service for purchase over U.S. \$50. Similarly, Central Food Retail offers free delivery with purchases over U.S. \$35 while Tesco Lotus charges a U.S. \$2 delivery fee and requires shoppers to order 1 day in advance.

Tesco Lotus has also pioneered several other channels to take advantage of the E-Commerce trends including: 1) ShopBox 24 which allows customers to have select goods delivered to ShopBox 24 lockers located at 48 condominiums in Bangkok; 2) the Happy Fresh app which allows online orders of fresh produce, meat, dairy, and grocery products for immediate delivery; and 3) iBeacon which alerts customers to promotions when they enter the store. While iBeacon is only currently operational for five stores, Tesco Lotus plans to expand this latest marketing initiative to over 1,800 stores. 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.

Comparison of Online Shopping by Store Type

| | Department Store | Hypermarket |
|-----------------------------|---|---|
| Highlight | Reputation of the store, variety of products and brands, product quality guarantees | Serve customers who want to avoid traffic and parking |
| Tools | Application, website | Application, website |
| Popular sales items | Apparel and cosmetics | Consumer oriented food products such as drinking water, rice |
| Order per time | 1-2 pieces | Minimum quantity and value per order for free delivery or minimum delivery fee |
| Marketing strategies | <ul style="list-style-type: none"> - Free deliver in 24 hours - Online payment or cash on delivery options - Able to return purchased products - Special online discounts | <ul style="list-style-type: none"> - Delivery fee may be waived based on certain conditions - Online payment or cash on delivery options - Able to return purchased products |
| Competitors | <ul style="list-style-type: none"> - Grey market - E-market retailers | Traditional wholesalers and retailers |

Department stores and hypermarket continue to promote online shopping to expand sales and to reach consumers who prefer to shop online for convenience.

Advantages and challenges facing U.S. products in Thailand

| Advantages | Challenges |
|--|--|
| U.S. exporters are able to provide many varieties of high quality agricultural products from fresh to processed foods. | Stiff competition from countries that signed FTA's with Thailand such as Australia, New Zealand, China, Peru, Chile, India, Korea, Japan, and others like South Africa and Europe. |
| Thai consumers increasingly prefer higher quality products. | U.S. products are not always price-competitive as compared to imports from China, Australia, New Zealand, Korea, and Malaysia. |
| Local Thai consumers view U.S.-origin products as being high quality and safe. | Local manufacturers can quickly improve or change the products according to consumer behavior while keeping production costs low. |
| Bangkok, which accounts for 90 percent of fast moving consumer goods sales, is easily accessible by U.S. brands | Lack of knowledge about new U.S. products makes Thais reluctant to purchase unknown foreign products or unpopular brands. |
| Growing middle class increasingly spends more on imported food. | Many Thais have a preference for certain local brands (e.g. Nestle, Singha Beer, Chang Beer, etc.). |
| Retail outlets are expanding, which allows more Thai consumers to access new imported products. | Lack of importer and retailer knowledge and training in purchasing and handling of U.S. food products. |
| Thai palettes increasingly include the consumption of imported food items. | Lack of continuous promotion of U.S. products in the Thai market. Exporters need to support market promotion campaigns to open new markets or promote new brands. |
| More disposable income to spend on high premium products. | Market penetration for imported products is concentrated in Bangkok and major tourism areas. |
| The growing tourism industry is fueling demand for U.S. seafood, beef, wines, whiskies, etc. | Foods similar to American products cost less to produce locally. |
| Reliable supply of U.S. agricultural products and advanced U.S. food processing technology. | Thai government policy typically provides preference to local Thai products. |
| Good relationships with foreign suppliers. | High import tariffs on high value consumer foods and beverage products which hamper the import of U.S. meat products, wine, whiskies, beer, cherries, peaches, grapes, apples, pears, among other items. |
| Gift giving is essential and luxury foods are preferred. Shoppers like to seek and purchase new products for gifts. | Marketing costs to increase consumer awareness are high. |
| Thailand's beneficial geographic location is viewed as a gateway to other Asian markets. | Quality of domestic production and marketing is improving. |
| Demand shift from unprocessed foods in fresh markets to a wider array of food products creates new demand for imports. | SPS and TBT issues hamper U.S. imports. |
| The fast pace of modern life and the increased | Most of ready-to-eat meals can be produced |

| | |
|---|----------|
| number of singles, one-parent families, and working women has changed the way food is prepared and consumed. | locally. |
| Health conscious consumers create new opportunities for U.S. exports. | |
| U.S. seafood products have great potential because they are marketed as sustainable. A select group of consumers seek foods derived from all-natural ingredients. | |
| Approximately 14 percent of the Thai population will be aged over 65 by 2021. However, there are a limited number of domestic suppliers of healthy, supplementary and dietary food for an aging population. | |

Section II. Road Map for Market Entry

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

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

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 are more difficult to enter because of the prevalence of lower-priced products, lower consumer purchasing power, limited traditional distribution outlets, and consumer preference for traditional Thai and Chinese food products.

Distribution Channels

Local manufacturers usually have their own distributors deliver their products. Some local producers are produced under a Royal Project in which product distribution is managed by a designated employee.

Section III. U.S. Exports and Competition in 2016

U.S. Products items that have a good potential sale in Thailand

2016 import data

| Product | Total Imports | Direct Imports from the U.S. | Share of U.S. Imports | Major Competitors |
|--|----------------------|-------------------------------------|------------------------------|---|
| Beef & beef products (0201, 0202, 021020, 160250) | 63,862,176 | 3,317,839 | 5% | Australia (60%) New Zealand (15%) Japan (12%) |
| Breakfast cereals/pancake mix (190410, 190420, 190430, 190490) | 49,988,846 | 1,567,223 | 3% | China (47%) Malaysia (12%) |

| | | | | |
|---|-------------|------------|-----|---|
| | | | | Philippines (10%) |
| Cheese (040610, 040620, 040630, 040640, 040690) | 65,325,295 | 5,812,963 | 9% | New Zealand (32%) Australia (24%) USA (9%) |
| Coffee, roasted (090121, 090122) | 11,804,343 | 1,951,121 | 17% | Malaysia (35%), USA (17%) Laos (16%) |
| Tea, whether or not flavored (090210, 090220, 090230, 090240) | 17,694,726 | 253,869 | 1% | Indonesia (27%) China (24%) Japan (14%) |
| Dairy products (excl. cheese) (0401, 0402, 0403, 0404, 0405, 210500, 350110, 350190, 350220, 350710) | 445,954,502 | 27,536,083 | 6% | New Zealand (51%) Australia (10%) France (8%) |
| Dried fruits (0804, 080620, 0813) | 35,560,370 | 10,338,057 | 29% | Indonesia (29%) USA (29%) China (12%) |
| Fresh fruits (0803 – 0810) | 695,544,370 | 42,373,876 | 6% | China (66%) New Zealand (8%) USA (6%) |
| Fresh vegetables (0701 – 0709) | 221,277,850 | 1,244,471 | 1% | China (78%) Laos (8%) Germany (3%) |
| Fruit and vegetable juices (2009) | 74,271,975 | 9,020,830 | 12% | Israel (27%) China (15) USA (12%) |
| Frozen potatoes (071010, 200410) | 56,647,158 | 18,409,083 | 33% | USA (32%) Netherlands (32%) Belgium (17%) |
| Sausage and prepared meat (1601, 1602) | 26,120,459 | 1,646,982 | 6% | Australia (36%) China (31%) USA (6%) |
| Snack food (excl nuts) (170410, 170490, 180620, | 316,916,062 | 17,763,772 | 6% | Indonesia (22%) |

| | | | | |
|---|---------------|-------------|-----|---|
| 180631, 180632, 180690, 190510, 190520, 190530, 190531, 190532, 190540) | | | | Malaysia (16%) China (15%) |
| Tree Nuts (0801 – 0802) | 192,052,705 | 32,955,565 | 17% | Vietnam (39%) Indonesia (25%) USA (17%) |
| Turkey meat (020724 – 020727, 160231) | 923,787 | 466,389 | 78% | USA (50%) Australia (24%) France (17%) |
| Wines and sparkling wine (220410, 220421, 220429) | 50,183,634 | 3,158,220 | 6% | France (40%) Australia (26%) Chile/Italy (7%) |
| Beer made from malt (2203) | 13,334,601 | 499,672 | 4% | Belgium (23%) Netherlands (18%) Malaysia (10%) |
| Whiskies (220830) | 139,615,268 | 5,299,016 | 4% | UK (93%) USA (4%) Vietnam (1%) |
| Fish, frozen (0303) | 1,789,149,168 | 160,548,033 | 9% | Taiwan (13%) China and USA (9%) |
| Fish, fillet (0304) | 194,540,582 | 16,391,360 | 8% | Vietnam (55%) China (10%) USA (8%) |
| Crustacean (0306) | 166,757,500 | 12,445,414 | 7% | Argentina (24%) Canada (12%) India (10%) |
| Molluscs (0307) | 397,260,129 | 2,799,690 | 1% | China (39%) India (10%) Vietnam (7%) |

Source: Global Trade Atlas

Locally and regionally produced snacks and beverages dominate the Thai market. Imported foods, however, do relatively well in Bangkok (especially near upper income residential areas and expatriate neighborhoods) and in major tourist areas such as Phuket, Hua-Hin, Krabi, Samui, and Chiang Mai.

FTA's between Thailand and other countries have created additional challenges for U.S. exporters. As a result, many U.S. food companies have shifted manufacturing from the United States to Thailand or neighboring countries such as Malaysia, Australia, China, and Indonesia to take advantage of the lower production cost. Additionally, FTAs have lowered tariffs and provided favorable treatments to competitors, and consequently have made U.S. products less competitive in the Thai market.

Section IV. 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.

Section V. Post Contacts and Further Information

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

Food & Drug Administration, Ministry of Public Health

Import License, Product Registration & Label Approval

Food Bureau

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Chemicals and Food Additives

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End of Report.