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Thailand

Exporter Guide

2000

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Report Highlights:
The outlook for Thailand's economy in 2000 is for continued recovery, with GDP growth in the 4-5 percent range. Consumer spending is steadily recovering as well. Thailand's retail sector has seen significant European investment in recent year and this trend is expected to continue. The expected growth rate of the HRI food service sector is around 15 percent, fueled by Thailand's booming tourism industry.

Includes PSD changes: No
Includes Trade Matrix: No
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Bangkok [TH1], TH

SECTION I. MARKET OVERVIEW

Economic Trends and Outlook

After two years of financial turmoil and suffering, Thailand's economy finally began to show signs of recovery in 1999. Thailand's annual GDP increased from USD 85 billion in 1990 to USD 151 billion in 1997, dropping to USD 113 billion in 1998, then recovered to USD 126 billion in 1999. The record showed that Thailand's GDP grew eleven percent on average from 1990 to 1999. Thai's economy grew four percent in 1999 in USD terms parallel with world economic growth of 3.7 percent. Thailand imported various consumer products and agricultural products from the United States valued at USD 5,200 million in 1999, down by five percent from 1998. The exchange rate in Thailand depreciated from THB 25 in 1996 to THB 31, THB 41 and THB 38 in 1997, 1998 and 1999 respectively. Therefore from 1997 to 1999, the value of total imports from the United States decreased drastically from seven percent to five percent. However, the trade surplus and healthy revenue from tourism helped Thailand post an average current account surplus of about USD one billion per month throughout 1999.

Worldwide, production of cash crops including key Thai crops of rice, tapioca, sugarcane, pineapple and rubber was likely to exceed demand in the last quarter of 1999, leading to a further decline in prices. Competition in the world market will be intense in 2000, with some countries trying to find new non-tariff barriers to protect their domestic producers. The lack of a concrete agreement of the World Trade Organisation in November 1999 created more difficulties and has delayed attempts by Thailand to liberalise the agricultural trade. To counter trade barriers in various non-tariff guises, the Thai government and the private sector need to ensure that products keep abreast of all requirements such as stricter hygiene standards for food production and storage, labelling of products free from genetic modification, and compliance with animal welfare regulations. Among the new developments in 2000 will be the emergence of a commodities market trade. In addition, the Thai Finance Ministry planned to restructure taxes on about 1,300 farm and agro-industrial products by the end of 1999. The restructuring would reduce import tariffs on farm and agro-products to 0-25 percent from a current 28-60 percent by the start of 2000. Thailand is required to reduce customs tariffs on farm and agro-industrial products to 27-40 percent by 2004, but the tax cuts planned would run ahead of schedule according to the agreement with the WTO in late November 1999.

The outlook for Thailand's economy in 2000 is stable. Government forecasts put economic growth at four percent in 1999, and private consumption alone accounts for 54 percent of gross domestic product. Consumer spending, a strong barometer of future confidence, is slowly but steadily recovering with the index growing by 10.4 percent in July 1999, compared with a year earlier, and by 13.3 percent in August. The rise in consumer spending was due to a sharp decline in interest rates, recovery in stock prices and tax reductions. With low deposit interest rate, there is less reason for Thais to put their baht in the bank. There is also a growing sense in general that the worst is over, fuelled by rising foreign reserves, robust government spending and newfound confidence by many that they will still have jobs tomorrow. Assuming a corresponding growth in trade throughout this period, U.S. exports should again approach USD 6,000 million in 2000.

Market Opportunities

- Thailand, covering an area of 514,000 square kilometers, lies in the heart of Southest Asia. It is divided into four distinct areas: the mountainous North, the fertile Central Plain, the semi-arid plateau of the Northeast, and the peninsula South. Thailand had a population of about 61.8 million by the end of 1999. Ethnic Thais form the majority, though the area has historically been a migratory crossroads, and thus strains of Mon, Khmer, Burmese, Lao, Malay, Indian and, most strongly, Chinese stock produce a degree of ethnic diversity. About 48 million Thais are aged 13 years and over, 24 million are male. Half of total population are in the labour force with average wages of THB 7,660 or USD 203.
- About 12 percent of total population live in Bangkok which accounts for 90 percent of the sales of fast moving consumer goods.
- The upper and middle-income groups represent 25 percent of the population or about 15 million people. Most of these people live in the major cities, including Bangkok, Chantaburi, Chiang Mai, Chiang Rai, Chonburi, Hat Yai, Khon Kaen, Nakorn Sithammarat, Pattaya, Petchaburi, Pitsanulok, Phuket, Ratchaburi, Samui Island, Sriracha, Surat Thani, Ubon Ratchathani and Udon Thani.
- The population has become increasingly more literate during the past decade due to increased overseas studies and international travel; access to the internet; international TV; expansion of modern shopping malls and supercenters; growth in major international hotel and restaurant chains; a significant number of western expatriates in the major cities; and growth in tourism (8.2 million international tourists in1999).
- The volatility in the Thai currency (Baht) directly led to sharp drop in imported food products in 1998 and half year of 1999, due both to increase costs to the consumer and unacceptable exchange rate risks to importers. However, a stable and stronger Baht in the second half of 1999 led to a sharp rebound in imported consumer-oriented food products from the United States. Full recovery is projected by the year 2002.
- The peak business periods are during the holiday seasons when consumer spending increases. The most important holiday seasons are New Year, Songkran Festival (Thai New Year), Chinese New Year and Ramadan. Thais consume significantly greater amounts of flour, sugar, eggs, milk, cheese, bread, poultry, meat, seafood, snack foods, breakfast cereal, cakes, cookies, pastries, fresh and dried fruits, vegetables, fruit juice, beers, chocolates, nuts, wine, whisky and nutritional food items during the holiday seasons.
- Upper and middle-income groups in Thailand like to spend on food especially during the holidays and on daily consumption. During New Year, Christmas, Chinese New Year and Thai New Year, gifts of food are given, especially consumer products such as coffee, tea, milk, snack food, jelly, jam, crackers, nuts, fruit juice, wine, beer, whisky, rice, health food and fresh fruit.
- Thais celebrate all the time. Therefore, stores take advantage of holiday seasons, decorate and promote festive foods such as special fruits, sweets, wines, cakes, cookies, chocolate, fruit juice, vegetables, fresh fruits, candies, seafood, U.S. beef, poultry and pastries. Other western celebrations such as Valentine's Day, Halloween, April Fool's Day and U.S. Independence Day have also become trendy among up-scale restaurants inBangkok.
- Thai consumers are very price conscious and susceptible to economic swings, with purchasing fluctuations occurring more in the middle and lower income groups. Currently, Thai consumers are educated through TV advertisements and mass media; hence, the 'brand image' has become

more important.

- 88 percent of the female population aged 13 and over are employed throughout the country. With less time available for shopping and cooking, their focus is increasingly on convenience. However, almost all Thais aged 13 up to 40 like to go out for shopping and dine out.

Advantages And Challenges Facing U.S. Products In Thailand

Advantages	Challenges
Of 62 million Thai consumers, about twenty percent can afford imported foodstuffs and are aware of U.S. brands, taste profiles and quality.	Depreciation of the Thai Baht and other regional currencies has increased the retail price of U.S. food products more than that of imported foods from other countries.
Thais view U.S. products as being of high quality and safe.	Local manufacturers can improve or change quality of products, tastes or packaging sizes according to changes in consumer behaviour and can lower production cost.
The growing retail industry is looking for new imported food products.	Lack of importer and retailer knowledge and training in purchasing and handling of U.S. food products.
High quality U.S. style foodstuffs are not presently produced in Thailand.	Thai people prefer to buy good quality food, but are price conscious among middle and low-income groups.
Vast varieties of high quality U.S. products.	Negative perception of U.S. biotechnology and genetically engineered seeds.
Niche market with high profit and super premium price.	The difference in Thai taste preference. Only certain groups of people are U.S. brand consumers.

Thai life style in Bangkok and major cities has become less focussed on a traditional diet.	More varieties of imported foodstuffs from other countries and greater competition from third country suppliers.
WTO and AFTA members agreed to reduce import tax for 1,300 of Thai farm and agro-products to 0-15 percent in 2000.	Current import tax and tariff rate for farm and agro-products is 28-50 percent.
U.S. fast food and restaurant chains are popular and are familiar to Thai consumers.	Economic recession and unemployment restrains Thais from spending. U.S. fast food chains switched to local sourcing.
Quality of U.S. foods is well known and is perceived as safe.	Pricing disadvantage of U.S. products versus competitors based in Australia, New Zealand and Southeast Asia.
U.S. beef, lobster, shrimp, and crab are widely used in hotel and resort restaurants especially in American, French, Japanese and other international style restaurants.	American style mass food products produced locally cost less.
Investment by U.S. multi-nationals in the food processing sector requires world standard ingredients, including processed products targeted for regional export strategies.	Global purchasing organizations tend to buy from the cheapest acceptable sources.

SECTION II. EXPORTER BUSINESS TIPS

< Visit the market to conduct market research, especially for product testing, price comparison, adjusting the product for local tastes, and finding out government regulations. Meet local importers, distributors and retailers.

< Large manufacturers import raw materials directly while medium and small food manufacturers prefer purchasing products through local importers.

< U.S. exporters must provide reliable product availability, consistently supplying a quality product, technical support, information support and accurately responding to inquiries within 24 hours because Australia and New Zealand are just a phone call away in the same timezone.

< Establishing relationships with local importers, distributors, retailers and consumers.

< Maintain credibility by keeping promises every time, every occasion, without exception and without delay.

< Don’t automatically apply ways of doing business in Japan and China to Thailand. The cultures are different.

< Understand Thai culture tends to be more class conscious and more formal than United States.

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

< Product Registration;. Applications for product registration should be submitted to the Food Control Division, 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 necessary details required by the FDA.

< The product should be packed and shipped for a tropical climate, and have clear storage instructions. This is especially important as few cold storage or air-conditioned facilities and delivery trucks exist.

< When introducing new products, several factors should be kept in mind. Thai consumers from upper to middle income groups, have an aversion to low quality products and are attracted to branded products. They also tend to be image conscious. Brand loyalty is most likely to be broken by products that are of good quality, well packaged, well-distributed, well-promoted and competitively priced, rather than cheap products.

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

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

RETAIL SECTOR

Market Overview

Thailand’s retail sector enjoyed 10 percent growth in 1999, with discount stores reaping the most gains. This sector is poised to maintain its competitive edge in the long run since transformation by significant European investment. There are approximately 903,897 retail food outlets in Thailand. Of these outlets, 17 were cash-and-carry, 34 were supercenters, 9 were hypermarkets, 441 were supermarkets, 3,360 conveniences stores, 37 kiosks, 300,000‘mom & pop’ and about 600,000 wet markets. In Thailand, 73 percent of total food consumption are from retail food outlets above. About 37 percent of total imported food and beverages (USD 963 million) were U.S. products in 1998. However, nationwide, only five percent of total food and beverage consumed in Thailand was imported.

All imported U.S. products were sold through cash-and-carry, supercenters, hypermarkets, supermarkets and conveniences stores. Only a few U.S. products are sold in conveniences stores because U.S. branded food products such as snack foods, candy, chocolate and breakfast cereals are present in the market as locally produced food products. The ASEAN Free Trade Area (AFTA) is one of the major factors contributing to shift in manufacturing base.

Supercenters, hypermarkets and supermarkets are the best method of entry for U.S. exporters to take to enter Thailand’s retail food market. U.S. exporters can contact the head office directly or through Thai importers/distributors of food products. The main factors U.S. exporters should consider for U.S. food products are pricing, shelf life of the product and customer preference.

Most supercenters, hypermarkets and supermarkets in major cities of Thailand usually prefer to purchase imported products from local importers or distributors particularly perishable products. In general, the procurement division in Bangkok must approve new products and suppliers. Subsequent orders may take place from individual stores, especially those outside Bangkok. Delivery is to a central warehousing facility or individual stores. At present, large supercenters, hypermarkets and supermarkets are opening their own logistic companies to serve their delivery needs nation-wide. This trend of streamlining the distribution channel will hasten delivery from suppliers to retail outlets.

Future Trends

Thai consumers have regained confidence in Thailand's economic future, which has led to increased consumer spending. Sales at supercenters account for more than 40 percent of total retail store sales, or THB 91 billion (USD two billion) of total sales of THB 212 billion (USD six billion). Sales at modern retail stores account for less than a fifth of all retail sales in Thailand. The entry of foreign retailers is likely to influence trends in the overall retail market because competition in discount stores and hypermarkets will intensify. However, more competition is not deterring the smaller retailers. Mahboonkrong Shopping Complex, Home Fresh Mart (The Mall) and Robinson (CRC Ahold) have invested in making outlets more attractive. There has also been a growth in the number of convenience stores as a result of franchise fees being halved by operators such as 7-Eleven and Family Mart. In addition, retailers are competing on the basis of price, followed by variety of merchandise and services. Thai retailers have to tap niche markets while avoiding direct competition with bigger foreign operators. While foreign stores such as Watson's, Boots, Carrefour, Tesco-Lotus and Big C choose to obtain products locally, Villa Supermarket, a Thai-owned supermarket, differentiates itself by offering imported products, and focuses on foreign and middle and upper income Thais.

Entry Strategy

The best way for U.S. exporters to sell to Thai supermarkets, supercenters and hypermarkets are to directly contact importers and distributors. U.S. exporters should be aware that many multi-national 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 SKU. Currently, several international players have recently expanded their presence in the local retail market, including Auchan of France, CRC Ahold of the Netherlands, the Belgian Delhaize Le Lion supermarket group, Tesco of the UK, Carrefour Group of France and the Casino Group of France.

Best Market Prospects

Best market prospects for U.S. suppliers include American spices, seasonings and sauces, fresh and frozen sea food (lobster, crab, crawfish, fish), beer, biscuits, breakfast cereal, canned foods (fruit, soup and vegetables), candy, chocolate, chocolate milk mix, cola, corned beef, corn oil, dairy products (milk powder, cheese, cheese spread, cream cheese, whipped cream, sour cream, cheese sticks, cheese dip and ice-cream), dips, fresh fruit and vegetables (radish, celery, carrots, apples, grapes, cherries, kiwi fruit, avocados, blueberries, grapefruit, oranges), frozen cake, frozen peas, fruit juices (apple, prune, orange, grape, sparkling white grape), instant coffee, jam, macaroni and cheese dinners, mayonnaise, Mexican sauce, nuts (peanuts, walnuts, hazel nuts, macadamia nuts), peanut butter jelly, pet food, pie filling, pop-corn, poultry, preserved or dried fruits, pickles, prunes, raisins, rice (paddy, long grain and short grain), ready-to-mix pancakes, cookies, muffins and cake, red meat, snack foods, syrup, tortilla chip, TV dinners, vinegar, wine and whisky.

The best selling U.S. food products are fresh fruit and vegetables, malt, nuts, jam and jelly, sauces, soups, dairy products, wines, snack foods (flour of meat or fish), frozen meat, fresh fish, animal product, breakfast cereal, soybeans and oil cake.

Further Information

For a more detailed assessment of the Thailand's Retail Food Sector, please see: A Market Brief on Thailand's Retail Food Sector Report 1999. Information on how to access this report is available under Section V.

HRI FOOD SERVICE SECTOR

Market Overview

In Thailand, there are 2,350 hotels, 364 resorts and 784 bungalows. The value of food sales for hotels and resorts throughout the country is significantly larger compared to restaurants, especially for five star hotels and resorts chains which attract wealthy Thais, business people, resident expatriates and tourists. Hotel and resort restaurants have a wide variety of national or regional based foods such as American, British, Californian, Chinese, Continental, Danish, French, German, Italian, Japanese, Korean, Lebanese, Mediterranean, Mexican, Polynesian, Swiss and Thai cuisine. Alternatively, restaurants can be grouped by type of main ingredient, for example seafood or pizza, or method of preparation, such as a 'grill'. About 60 percent of customers are middle class Thais and Thai professionals, whilst 40 percent of customers are made up of resident expatriates and tourists. The total value of food sales for restaurants in Thailand is larger than that of institutional food services. In Thailand there are about 212 international food restaurants located in prime areas of Bangkok, 427 international food restaurants in Phuket, Samui, Chiang Mai and 328 local food restaurants in other provinces. The numbers of restaurant outlets do not include fast food, mid-level family style restaurants, coffee shops, noodle shops, other speciality food shops and home/office delivery services. In total there are over 100,000 restaurants in Thailand. In the restaurant sector, there are 733 fast food restaurants nation wide and more than 15,000 mid-level family style restaurants, coffee shops, noodle shops, speciality food shops and home/office delivery services. The expected growth rate of the HRI food service sector is around 15 percent versus an IMF expected growth rate for the Thai economy of only one percent.

Future Trends

In 1998 Thailand attracted 7.76 million foreign tourists. In the first nine months of 1999, tourist arrivals to Thailand grew by 11.14 percent due to economic recovery in ASEAN markets and solid growth from many western countries.

Although the Thai currency has grown stronger, making Thailand slightly less of a bargain in the eyes of tourists, Phuket and Samui island are now much better established on the international tourism map. Hoteliers on both islands continue to enjoy high-season occupancy rates of 90 percent or more.

Entry Strategy

Direct contact with local food service importers is the best entry for U.S. exporters. Normally the hotels and resorts do not import food directly in volumes attractive to U.S. exporters. It is easier for hotels and resorts to order from food service companies because they have specialised in providing high quality U.S. products to the five-star hotel and restaurant industry. Restaurants such as fast food chains or family style restaurants, also order and purchase imported food from food service companies or from their affiliate companies 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, Chiang Mai, Samui island, Phuket and Phi Phi island are secondary recommendations for U.S. exporters. Direct contact with Thai Airways International's catering department is highly recommended.

Best Market Prospects

Best market prospects for U.S. suppliers include American seafood such as fish, crab, shrimp and crawfish (fresh and frozen), American spices, seasonings and sauces, baking products, beer, biscuits, breakfast cereal, canned foods (fruit, soup and vegetables), cola, corned beef, corn oil, dairy products (cheese, cheese spread, cream cheese, whipped cream, sour cream, cheese dip and ice-cream), dips, fresh fruit and vegetables (radish, celery, carrots, apples, grapes, cherries, kiwi fruit, avocados, blueberries, grapefruit, oranges), frozen cake, frozen peas, fruit juice (apple, prune, orange, grape, sparking white grape), jam and jelly, mayonnaise, Mexican sauce, nuts (peanuts, walnuts, hazel nuts, macadamia nuts), pie filling, pop-corn, preserved or dried fruits, pickles, prunes, raisins, ready-to-mix pancakes, cookies, muffins and cake, snack foods, syrup, tortilla chips, U.S. beef, U.S. poultry, vinegar, wine and whisky.

Further Information

For a more detailed assessment of Thailand's Hotel, Restaurant and Institutional Food Service Sector, please see: A Market Brief on Thailand's Hotel, Restaurant and Institutional Food Service Sector Report 1999. Information on how to access this report is available under Section V.

FOOD PROCESSING SECTOR

Market Overview

Thailand's total import volume of all food ingredients was about 1.5 million tons in 1997 and 984,114 tons in 1998. Import value totalled more than THB 32 billion (USD 1.28 billion) in 1997 and THB 15,684 million (USD 379 million) in 1998. Based on the selected categories, Thailand's total import volume of food ingredients decreased to 984,114 tons in 1998 due to the higher Baht value between 1996 and 1997 and the sharp depreciation in the Baht beginning in July 1997. Most of these import categories dropped in volume for the first half of 1998, again due to the devaluation of the Baht and the resulting reduction in demand due to the economic recession. Chemicals, fish and seafood, milk products, cereals, fats and oils, starches and derivatives, and coloring were the leading volume imported food ingredients over the past three years. About 50 percent of Thailand's processed food products are exported, with most of the shipments going to Japan, USA and the EU. The economic crisis that swept Thailand and other Southeast Asian countries into recession since mid-1997, has greatly impacted the country's food processing sector and weakened demand for food ingredients. Although the weaker Baht has made Thailand's exports more competitive, many Thai food processors have been unable to capitalise on new market opportunities because of higher raw material and ingredient costs, as well as more limited access to credit.

Another impediment to the food processing industry is the EU cut on the Generalised System of Preferences (GSP) allowances previously granted to Thailand in 1999. This is likely to have a direct and negative impact on the processed food industry. Under the new system, Thai food products without GSP will be more expensive in the EU than imports from other countries. It is currently projected that Thai exporters will lose about 10 percent of their market share in the EU market in 1999. The farm products, which had benefited from the weakened Baht during the crisis, diminished, with exports representing USD five billion or 12 percent of the total. Falling commodity prices worldwide and a global oversupply are expected to drag down export prices of farm products further in 2000. Farm sector export values in the first nine months of 1999 dropped by 7.5 percent to USD 4.9 billion, despite higher volumes. The volume of exported frozen shrimp, rose by 6.4 percent in the first nine months of 1999 but the value fell by 13.9 percent.

Future Trends

The food processing industry has also changed in recent years to adapt to the demands and lifestyles of domestic consumers, particularly a growing middle class. The recent decline in individual incomes in 1997 and 1998 has impacted domestic consumption. However, economic growth of four percent in 1999 brought back consumer confidence and spending. The country's food export opportunities in 2000 are expected to remain stagnant compared with 1996. However, export recovery primarily depends on the external factors, led by global economic growth. There were no signs on the horizon of negative external factors, and the prospect of China devaluing its currency seems to have eased. In order to stimulate exports, the Thai government will introduce a tax restructuring regime sometime in 2000, aiming to cut the production costs of exporters and strengthen competitiveness. At the same time, it speeded up refunds of value-added tax to exporters to help them improve their cash flow. Thai food processors are, in general, still quite competitive economically and are working to adapt to new food quality requirements imposed by foreign buyers.

Entry Strategy

There are several ways for U.S. suppliers to enter the Thai market. Probably the most effective is to appoint a reputable and experienced local importer or distributor. Local firms will have a good understanding of the market and know how to make direct contact with importers, end users, government officials and other key contacts. A good local importer/distributor can also provide valuable support in arranging meetings and promotional events, translating technical information, placing advertisements in local trade publications and other marketing and sales activities. Trade shows are also effective ways to promote new products. Food Ingredients Asia, the Thailand Food Fair, and other shows, both in

Thailand and Singapore, are usually well attended by Thai food companies.

U.S. market development cooperators are also active in Thailand and other Southeast Asian 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, U.S. Meat Export Federation, U.S. Dry Pea and Lentil Council, U.S. Dairy Export Council, various U.S. fruit and nut associations, as well as several state and regional groups such as WUSATA, EUSAFEC, SUSTA, and MIATCO.

Best Market Prospects

Best market prospects include maize, soybeans, cotton, cereals, food chemicals and additives, emulsifiers and enzymes, essential oils, flavorings, meat, nuts and dried fruits, lactose, whey and skim milk powder.

Further Information

For a more detailed assessment of the Food Ingredients Import Market of Thailand, please see: a Market Brief of Thailand Food Ingredients Import Market Report 1999. Information on how to access this report is available under Section V.

DISTRIBUTION SYSTEM

In Thailand, the distribution channel for retailers, hotels, restaurants, institutional contractors and food processers is very similar. The distribution channel to supermarkets, supercenters and hypermarkets in Thailand normally begins from importers to distributors to a central warehouse or direct to retail outlets. The foodstuffs will be kept either in the importers' warehouse, distributors' warehouse or central warehouse before delivery. Besides the above, the principal and manufacturer can also deliver food products directly to their distributor.

A common distribution channel to convenience stores, gas marts and kiosks flows from U.S. exporters to U.S. consolidators and traders to Thai distributors to C-stores, gas marts and kiosk distribution centers. Some Thai distributors distribute foodstuffs directly to C-stores, gas marts and kiosk outlets. Most of the foodstuffs that are distributed directly to the outlets are fresh, including dairy products. The flow pattern of different retailers varies depending on the sales volume and number of outlets. A key ingredient in the success of the larger retailers is the control of their own distribution center.

Food processing generally is distributed through two main channels. The first is via traditional importers, who re-sell to local distributors or distribute through their own marketing and delivery network to end-users. As Thailand's food processing industry has grown and become more sophisticated over the past decade or more, end-users are increasingly importing directly from foreign suppliers. This is especially true for large, integrated food processors, which export many of their products and are well oriented to international trade.

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

Best market prospects, as identified by the Foreign Trade Statistics of Thailand are as follows:

Rank	**Product**	**HS code**	Two-Year (98/99) Average Value of Imports from U.S. (USD 1,000)	**U.S. Market Share in 1999 (%)**
1	Soy Beans	1201	96,000	58
2	Pet Food	2301	76,000	11
3	Breakfast cereal, snack food	1001	52,000	38
4	Other Edible Preparation include soup, sauce and ice-cream	1901 2103 2104 2105	18,000	29
5	Fresh Fruits	0805	16,000	44
6	Dairy Products	0401	12,000	5
7	Processed Fruits and Vegetables, include jam and jelly	2001 0811 2007	9,000	56
8	Crustaceans	0306 1605	7,000	6
9	Other Edible Consumer-Oriented Product, snack food	1101 1501 1902	6,000	3
10	All kinds of fish	0301	4,000	1
11	Grain Seeds and Fruits	1202	2,250	8
12	Lac, Gums, Resin	1301	3,000	12
13	Sugar, Lactose	1701	2,000	22
14	Red Meat	0201	1,500	38
15	Wine, Beer, Beverage	2201	1,500	3
16	Fruit and Vegetable Juice	2009	2,000	33
17	Coffee, Tea, Spice	0901	1,000	7
18	Tree Nuts	0801	1,000	3
19	Fresh Vegetables	0701	1,000	7
20	Chocolate	1801	1,000	4

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

MAJOR REGULATORY AGENCIES

FOOD AND DRUG ADMINISTRATION, MINISTRY OF PUBLIC HEALTH

Import License, Product Registration and Label Approval

Director
Food Control Division
The Food and Drug Administration
Tivanont Road, Muang, Nonthaburi 11000
Tel. +662-590-7178
Fax.+662-591-8460

Food Products from Animals

The Food and Drug Administration
Tivanont Road, Muang, Nonthaburi 11000
Tel. +662-590-7207/8

Food Products from Plants

The Food and Drug Administration
Tivanont Road, Muang, Nonthaburi 11000
Tel. +662-590-7023

Chemicals and Food Additives

The Food and Drug Administration
Tivanont Road, Muang, Nonthaburi 11000
Tel. +662-590-7209, 590-7219

Food for Special Purposes and Food Supplement

The Food and Drug Administration
Tivanont Road, Muang, Nonthaburi 11000
Tel. +662-590-7205, 590-7098

Other Food Products

The Food and Drug Administration
Tivanont Road, Muang, Nonthaburi 11000
Tel. +662-590-7220

Food Inspection

Inspection Division
The Food and Drug Administration
Tivanont Road, Muang, Nonthaburi 11000
Tel. +662-590-7323
Fax. +662-591-8477

DEPARTMENT OF MEDICAL SCIENCES, MINISTRY OF PUBLIC HEALTH

Food Analysis

Food Analysis Division
Department of Medical Sciences
Soi Bumratnaradul Hospital
Muang, Nonthaburi 11000
Tel. +662-951-0000 ext. 9561
Fax. +662-951-1023

DEPARTMENT OF FOREIGN TRADE, MINISTRY OF COMMERCE

Import Control

Commodity Trade Division
Department of Foreign Trade
Rajadamneon Road, Bangkok 10200
Tel. +662-282-7315
Fax. +662-282-0827

Commodity Division I
Department of Foreign Trade
Rajadamneon Road, Bangkok 10200
Tel. +662-629-1675/6
Fax. +662-281-9456

Grain Division
Department of Foreign Trade
Sanamchai Road, Bangkok 10200
Tel. +662-226-1564
Fax. +662-622-1760

Application for Import Permit

Foreign Trade Services Center
Department of Foreign Trade
Rajadamneon Road, Bangkok 10200
Tel. +662-281-6767

Fax. +662-282-0826

DEPARTMENT OF LIVESTOCK, MINISTRY OF AGRICULTURE AND COOPERATIVES

Animal Quarantine (Livestock and Carcasses)

Director
Disease Control Division
Department of Livestock
Phyathai Road, Bangkok 10400
Tel. +662-252-5967
Fax. +662-252-5967

Bangkok Seaport Animal Quarantine Station
Klong Toey Port, Bangkok 10110
Tel. +662-249-1221
Fax. +662-249-4388

Bangkok Airport Animal Quarantine Station
Don Muang Port, Bangkok 10900
Tel. +662-535-1546, 535-1210
Fax. +662-535-1546, 535-1210

DEPARTMENT OF FISHERIES, MINISTRY OF AGRICULTURE AND COOPERATIVES

Marine Animals

Chief of Fisheries Administration & Management Section
Fisheries Resources Conservation Division
Department of Fisheries
Kasetsart University, Chatuchak, Bangkok 10900
Tel. +662-562-0600/15 ext. 3509
Fax. +662-562-0528

DEPARTMENT OF AGRICULTURE, MINISTRY OF AGRICULTURE AND COOPERATIVES

Plant Quarantine

Plant Quarantine Subdivision
Agricultural Regulatory Division
Department of Agriculture
Chatuchak, Bangkok 10900
Tel. +662-940-6573, 940-6670 ext. 108
Fax. +662-579-4129

Plant Quarantine Control Post
Cargo Building
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EXCISE DEPARTMENT, MINISTRY OF FINANCE

License of Alcoholic Beverages

License Subdivision
Bureau of Tax Administration 1
Excise Department
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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
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CUSTOM DEPARTMENT, MINISTRY OF FINANCE

Import Formalities

Import Formalities Division
Customs Department
Klong Toey, Bangkok 10110
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Legal Affairs

Legal Affairs Bureau
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U.S. DAIRY EXPORT COUNCIL

Southeast Asian Representative Office
Pacrim Associates Limited
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U.S. DRY PEA AND LENTIL COUNCIL

AgriSource Co., Ltd
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AMERICAN SOYBEAN ASSOCIATION

Thailand Representative
Level 24 Muang Thai-Phatra Tower 2
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WASHINGTON APPLE COMMISSION
208 Soi Ram-Indra 9
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Big C Supercenter Co., Ltd
Fl 7 Univest Building
89/36 Rajadamri Road
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Bangkok 10330, Thailand
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Fax. +662 655-5801-2
Contact person: Mr Preecha Ekkunagul, Managing Director

Ek-chai distribution System Co., Ltd (Lotus Supercenter)
Modernform Tower
1000 Moo 16
Srinakrarin Rd, Suanluang
Bangkok 10250, Thailand
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Fax. +662 722-9637
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CRC Ahold Co., Ltd (Top Supermarket)
139 Ratchadapisek Rd
Dindaeng, Huaykwang

Bangkok 10320, Thailand
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1988/2 Ramkhamhaeng Road
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Fax. +662 315-6605 / 318-8923
Contact person: Mr Surat Ampooch, President

Siam Jusco / Max Valu
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Fax. +662 641-2776-7
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The City Mall Group Limited (Emporium)
622 Sukhumvit Rd
Klongton, Klongtoey
Bangkok 10110, Thailand
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Fax. +662 719-9462
Contact person: Mr Apichat Asawapokee, Senior Director

Foodland Supermarket Co., Ltd
2675 Lard Prao 95
Wangthonglarng, Bangkok 10310, Thailand
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Contact person: Mr Supamit Surongsain, Asst. Vice President Marketing
Tang Hua Seng Department Store
179 Sirinthorn Rd

Bangbamru, Bangplad
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Contact person: Mr Viroj Chunprathipthong, Managing Director

Sunny's Supermarket Company Limited
2nd Fl., Moo 1, Srinakrarin Rd
Nongborn, Praves
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Tel. +662 721-5580-98 extension 1136
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Contact person: Mr Tanin Buramanit, Vice President

Isetan Department Store
4/1-4/2 World Trade Centre
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Auchan Thailand
208 Moo 3, T. Thasala
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Fax. +6653 262-380
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Food Lion Supermarket Co., Ltd
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Contact person: Mr Wiwat Awasiripong, Executive Director

UFM Fuji Super
593/29-39 Sukhumvit 33/1
North Klongton, Wattana
Bangkok 10110, Thailand
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591/1, 4-5 Sukhumvit Rd
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Fax. +662 259-1077
Contact person: Mr Surapong Poosanakhom, Managing Director

Suvimon Co., Ltd (Marks & Spencer)
21 Chidlom Tower Bldg
9th Fl, Soi Somkid
Ploenchit Rd, Pathumwan
Bangkok 10330, Thailand
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CP 7-Eleven Co., Ltd
313 CP Tower, 29th Fl
Silom Rd, Bangkok 10500, Thailand
Tel. +662 631-0231 extension 1633
Fax. +662 631-1446
Contact person: Mr Piyawat Thitasathavorakul, Managing Director

AM/PM (Thailand) Limited
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Moo 14, Vibhavadi Rangsit Rd
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Siam Familymart
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Dusit Thani Hotel
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Landmark Hotel
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Contact Person: Mr D Russell-Wiig, General Manager

The Regent Hotel
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21/100 South Sathorn Road
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Institutional Contracts

Thai Airways International Public Co Ltd
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Catering Department
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Eastwest Trading and Agencies Ltd

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353/39 Soi Lad Phrao 122
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Bangkok International Airport
Vipavadee-Rangsit Rd
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Fax. +662-236-8062, 238-1694
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Chamnan Phenjati Business Center, 26th Fl
65/215-216 Rama IX Rd., Huaykwang, Bangkok 10320
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Fax. +662-235-4128
Contact person: Mr Pravit Munkongpitakkul

Mahaboon Corp. Ltd.
1082/23-26 Phaholyothin Rd.
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Tel. +662-272-0531, 272-2700/11
Fax. +662-272-0597
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Rovithai Ltd.
Preecha Bldg., 11th Fl.
2533 Sukhumvit Rd., Bangchak, Bangkok 10250
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Fax. +662-332-7135
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Winner Group Enterprise Co., Ltd.
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Fax. +662-238-5310
Contact person: Ms Jane Wongisariyakul

POST CONTACT AND FURTHER INFORMATION

The USDA/Foreign Agricultural Service in Bangkok maintains up-to-date information covering food and agricultural import opportunities in Thailand and would be pleased to assist in facilitating U.S. exports and entry to the Thai market. Questions or comments regarding this report should be directed to the USDA/Foreign Agricultural Service in Bangkok at the following local or U.S. mailing address:

Office of Agricultural Affairs
American Embassy
Diethelm Towers Building
4th Floor Tower A, RM. 401
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Home page: http://www.fas.usda.gov

EXPORTER GUIDE

APPENDIX I. STATISTICS

A.KEY TRADE AND DEMOGRAPHICS INFORMATION

Key Trade Information: Thailand

Item	Import from the World (million USD)			U.S. Market Share (%)		
	1999	1998	1997	1999	1998	1997
Consumer goods, intermediate products and raw materials, capital goods and other imports	40,469	42,883	61,341	13	14	14

Demographic Information: Thailand

Total Population (million) in 1999	61.8	Annual Growth Rate	1 %
Bangkok Population (million) 1999	7.4	Migrants	2.7%
Municipal Area (million) 1999	12.7	Migrants	5.4%
Non-municipal Area(million) 1999	49	Migrants	5.2%
Central Region exclu.Bkk(million)	14	Migrants	7.9%
Northern Region (million) 1999	11	Migrants	3.6%
Northeastern Region (million)1999	21	Migrants	5.1%
Southern Region (million) 1999	8	Migrants	5.3%
Number of Major Metropolitan	16 *		
Size of upper and middle class 1999	15 mil.	Total Labour Force Aged 13 years and over	33 mil
Gross Domestic Product at current price (USD) 1999	126 bil.		
Unemployment rate (%) in 1999	5.3%		
Food Expenditure in 1999 (USD)	13 mil.		
Percent of Female Population Employed in 1999	80%		

Footnotes:
*Major Metropolitan areas include Bangkok, Chiang Mai, Chiang Rai, Chonburi, Khon Kaen, Korat, Ratchaburi, Petchaburi, Pisanulok, Phuket, Phi Phi Island, Samui Island, Surat, Udon, Ubon, Nakornsritamarat.

Exchange Rate (THB/USD) on Yearly Basis

1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
25.6	25.5	25.4	25.3	25.0	24.9	25.3	31.4	41.4	37.7

Sources: Bank of Thailand, National Economic and Social Development Board, National Statistical Office, Department of Business Economics, The Thai Customs Department.

B. CONSUMER FOOD & EDIBLE PRODUCT IMPORTS

Product	Global Imports (USD Million)		Imports from the U.S. (USD Million)		U.S. Market Share (percent)	
	1998	1999 (9mths)	1998	1999 (9mths)	1998	1999 (9mths)
Red Meat, Fresh/chilled/frozen	5.06	4.70	1.78	1.48	35	32
Red Meat, Prepared/Preserved	0.25	0.55	0.07	0.07	28	13
Poultry Meat	0.55	2.03	0.12	0.04	21	2
Live Fish	0.33	0.4	0.00	0.00	1	0.08
Fish, Fresh/Chilled/Frozen	617.98	619.6	4.98	10.64	1	2
Fish, Fillets and other Fish Meat	7.75	7.95	0.27	0.05	4	1
Fish and Fishery Products, Preserved	6.85	8.89	0.17	0.07	3	1
Crustaceans	132.89	151.68	7.30	7.63	6	5
Molluscs	50.07	77.77	0.00	0.04	0	0.05
Dairy Products (Excl. cheese)	276.23	253.39	13.73	13.28	5	5
Cheese	4.27	4.83	0.11	0.12	3	2
Egg and Products	6.02	6.60	0.13	0.16	2	2
Fresh Fruits	35.07	48.68	16.56	21.52	47	44
Fresh Vegetables	15.04	19.84	0.97	1.29	6	7
Processed Fruits and Vegetables, including jam	16.84	21.27	9.35	12.44	56	59
Fruit and Vegetable Juice	5.24	7.72	1.34	2.56	26	33
Tree Nuts	3.40	3.71	0.98	1.16	29	31
Coffee, Tea, Mate and Spices	8.91	6.40	1.06	1.03	12	16
Cereals*	154.11	159.46	48.80	72.40	32	45
Soy Beans	172.64	209.48	102.51	118.47	59	57
Grain Seeds and Fruits, excluding soy beans	31.64	34.80	3.07	2.48	10	7
Lac; Gums, Resins, Other Extracts	26.78	31.15	2.74	4.05	10	13
Sugar, Lactose and Molasses	11.94	9.00	1.82	1.81	15	20
Chocolate and Other Cocoa	28.88	32.09	0.91	1.51	3	5
Other Edible Preparations **	68.92	76.79	20.30	19.76	30	26
Wine, Beer, Beverage and Vinegar	51.13	82.87	1.43	1.96	3	2
Pet Food	368.50	451.48	83.33	90.97	23	20
Other Edible Consumer-Oriented Products***	214.62	242.85	5.91	7.04	3	3
Total edible products	2321.91	2,575.98	329.74	394.03	14	15

Note: 1999 forecast based on nine month data.

*Cereals include snack food
**Other edible preparations include soup, sauce and ice-cream

***Other edible consumer-oriented products include snack food, all kinds of seed

Source: Department of Business Economics, the Thai Customs Department.

C. TOP 15 SUPPLIERS OF CONSUMER FOODS AND EDIBLE FISHERY PRODUCTS

Thailand – Top 15 Suppliers
Consumer Goods include edible food

Country	1997 (USD million)	1998 (USD million)	1999 (USD million)
Japan	816	581	574
U.S.A	865	618	487
China	305	234	298
Singapore	352	254	231
Taiwan	288	218	190
Germany	221	249	178
Australia	241	226	175
Malaysia	257	166	157
United Kingdom	256	138	143
S. Korea	150	106	105
France	190	111	97
New Zealand	123	118	85
Switzerland	128	84	79
Hong Kong	117	86	70
Netherlands	106	66	58

Source:Trade and Economic Information Center, Thai Department of Business Economics