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## Thailand

### Exporter Guide

### Thailand Exporter Guide Annual 2004

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**Approved by:**

Rodrick McSherry, Agricultural Counselor  
U.S. Embassy, Bangkok

**Prepared by:**

Vladimir Diaz, Marketing Specialist

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**Report Highlights:**

This guide is an excellent one-stop source of information on Thailand, the 15th largest U.S. export market for consumer-oriented foods and beverages. For U.S. companies seeking to learn how to do business in Thailand, this guide provides practical tips and information on local business practices, consumer preferences and trend, food standards and regulations, import and inspection procedures. Also this guide identifies which of the three market sectors (food retail, food service, and food processing) offer the most opportunities for new sales and describes the best entry approach. Finally, this guide identifies the best high-value product prospects and key contacts and further information.

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## Section I. Market Overview

The Kingdom of Thailand is being prompted to be food and agricultural industry as the "Kitchen to the World." Thailand is Southeast Asia's second largest economy and it grew by 6.74% during 2003. Domestic spending and a rebound in exports of 12.20% bolstered the upbeat growth. Strong intra-Asia demand, diverse export markets, and a competitive presence in both the agricultural and the industrial sectors supported strong growth in manufacturing production and helped to strengthen the economic recovery process.

In the private sector, low interest rates were a major stimulus. Low interest rates at commercial banks have encouraged Thais to borrow to buy new homes, cars and other durable goods. Consumer spending accounted for 56.3% of gross domestic product. Additionally, the government played a pivotal role in spurring spending. The government provided incentives for the real estate sector and supported credit extension to villagers, consumers, civil servants and private companies.

<b>U.S.-Thailand Trade of Consumer Oriented Agricultural Products</b>					
(m; US\$ per year )					
	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>
Imports from Thailand	326	291	325	371	432
Exports to Thailand	51	61	67	70	79
<b>Trade Balance</b>	<b>-275</b>	<b>-230</b>	<b>-258</b>	<b>-301</b>	<b>-353</b>

Source: USDA Foreign Agricultural Service - Bangkok, Thailand

Thailand is currently the 15<sup>th</sup> largest export market for U.S. agricultural products. In 2003, Thailand imported \$79 million in consumer oriented foods from the U.S., up 24% over 2002's \$70 million. Corresponding U.S. imports from Thailand were \$431 million, up 11%. Exports have been among the key engines driving Thailand's economic recovery in 2003, despite increasing concerns over the volatile global economy.

<b>Change in Thai Food Import Mix from the U.S.</b>					
(m; US\$ per year; % of total )					
	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>
<b>Bulk &amp; Intermediate</b>	<b>336</b>	<b>416</b>	<b>465</b>	<b>554</b>	<b>548</b>
%	85	84	83	85	82
<b>Consumer Oriented</b>	<b>51</b>	<b>61</b>	<b>67</b>	<b>70</b>	<b>79</b>
%	13	12	12	11	12
<b>Edible Fishery</b>	<b>7</b>	<b>18</b>	<b>30</b>	<b>29</b>	<b>40</b>
%	2	4	5	4	6
<b>Total</b>	<b>394</b>	<b>495</b>	<b>562</b>	<b>653</b>	<b>667</b>

Source: USDA Foreign Agricultural Service - Bangkok, Thailand

Total exports of U.S. foods (including bulk and intermediate, consumer oriented, and edible fishery) to Thailand have shown a tremendous growth in the past five years. For example, exports to Thailand jumped from \$394 million in 1999 to \$667 in 2003 – accounting for a 41% increase. The fastest growing segments are edible fish and seafood products (82%), bulk and intermediate products (39%), and consumer oriented agricultural products (35%). The mix of products exporter to Thailand from the U.S. has remained stable – bulk and intermediate account for 82% followed by consumer-oriented products 12% and edible fishery 6% in 2003.

High duties on agriculture and food products remain the major hurdle to exports of U.S. high-value food products. Duties on imported consumer-ready food products range between

30% and 60%, the highest in the ASEAN region and perhaps in the world. Tariffs on meats, fresh fruits and vegetables, and pulses (e.g. dry peas, lentils, and chickpeas) are likewise high, even for items with little domestic production. Frozen French fries, for example, are not produced in Thailand, yet face a high tariff of 30% (WTO bound rate for 2003). When import duties, excise taxes, and other surcharges are calculated, imported wines face a total tax of nearly 380%. As of October 2004, the tariff on apples stood at 10%, while pears and cherries saw a tariff as high as 30% and 40% (2003 WTO bound rate) respectively. It is estimated that potential U.S. agricultural exports to Thailand could be over \$1 billion a year if Thailand's tariffs and other trade-distorting measures were substantially reduced or eliminated and the economy recovered to pre-crisis levels.

Things are improving, however. Free trade talks between Thailand and the U.S. began in mid 2004 and will take aim at market access barriers such as the high tariffs in Thailand. Expectations are for the talks to conclude in 2004 with the tariff reduction schedule to be implemented shortly thereafter.

**THAILAND OFFERS MANY OPPORTUNITIES FOR ALERT U.S. EXPORTERS. JUST A FEW EXAMPLES INCLUDE:**

- Thailand, covering 198,114 square miles, is situated in the heart of Southeast Asia and is considered as the gateway to Indochina. Thailand borders with Laos in the north and northeast, Burma in the north and west, the Andaman Sea in the west, Cambodia and the Gulf of Thailand in the east, and Malaysia in the south. With a population of 64 million, Theravada Buddhism is the national religion and is actively practiced by about 95% of Thais, with the remainder practicing Islam, Christianity, Hinduism and other faiths. About 48 million Thais are aged over 15 years,
- The size of the work force now exceeds 34 million, with the majority of the workforce under 30 years of age,
- The minimum wage in Thailand is roughly \$4.00 per day in Bangkok, and between \$3.10-3.90 per day elsewhere,
- A literate population due to increased overseas studies, international travel, access to Internet and cable TV,
- Over 10% of the total population lives in Bangkok, which accounts for 90% of the sales of fast moving consumer goods,
- Most of medium and high-income people live in the major cities, including Bangkok, Phuket, Chantaburi, Chiang Mai, Chiang Rai, Chonburi, Hat Yai, Khon Kaen, Nakorn Ratchasima, Pattaya, Petchaburi, Ratchaburi, Samui Island, Surat Thani, Ubon Ratchatahni and Udon Thani,
- A stable and stronger baht in 2003 and at the beginning of 2004 led to an increase in imported consumer-oriented food products from the U.S,
- Over the past few years, Thais living in urban areas have become relatively brand conscious and their shopping styles have moved away from the traditional open-air wet markets to modern supermarkets and shopping centers which offer them convenience and a wide selection of products,
- The expansion of retail business, particularly, hypermarkets (e.g. Tesco-Lotus, BigC and Carrefour), modern shopping malls, convenient stores, department stores, etc.
- The demand for imported processed food and raw materials used for re-processing and re-exporting has increased as they are considered better quality than local produce,
- Due to increasing number of women and young adult labor in the work force, the introduction of ready-to-eat and prepared food items is expected to trigger major growth in the convenience food market in Thailand. Moreover, this younger population is very receptive to new food tastes that fit their lifestyles,

- In early 2003, tourism around the globe experienced detrimental impact from two major incidents: namely, the Iraq conflict and the Severe Acute Respiratory Syndrome (SARS) epidemic in Asia. SARS left behind the most detrimental impact in Thai tourism history, especially in the month of May 2003. Thailand's tourism situation in 2003 began to improve in July, which partly resulted from the public and private partnership in marketing promotion. Pricing measures were used to attract international visitors, in addition, to travel security presented by the Royal Thai Government through the hosting of the APEC conference in October, as well as the launches of low-cost airlines towards the end of the year. In conclusion, 2003 saw a total of 10,004,453 international arrivals to Thailand, representing a decrease of 7.36% and generating tourism revenue of 309,269 million baht, a drop of 4.39% from the previous year. The average length of stay amounted to 8.19 days, with an average tourist expenditure of 3,774.50 baht per person per day, which was only slightly different from 2002,
- High growth in the number of hotels, resorts and other tourist accommodations leads to an increase in the number of imported food items to support more tourists,
- Upper and middle-income groups in Thailand like to spend money on food, especially during the holidays. Consumption of imported food products peak during New Year, Christmas, Chinese New Year and Thai New Year as gifts of food are given, especially consumer products such as coffee, tea, milk, snack food, jelly, jam, crackers, nuts, fruit juice, wine, beer, whisky, health food and fresh fruit,
- Continuous increase in the number of health-conscious consumers is leading to higher demand for health and functional food and drinks,
- Thai consumers view U.S.-origin foods and beverages as high quality and consistent products, for instance: U.S. beef, French fries, dried and fresh fruit, nuts, fruit juice, jams, and other products are always rated by local consumers as the best in the world. However, this perspective does not apply to all U.S. products, as some local consumers still think of France when they think of wine,
- Even though Thai consumers view U.S. products as high quality, they are very price conscious and susceptible to economic swings. There is a high possibility that the low-and middle-income group will shift to cheaper products of acceptable quality during an economic recession.

In summary, the Thai market offers many opportunities to U.S. exporters, but it is not without difficulties. To put these opportunities in perspective, some U.S. "Advantages" and "Challenges" are shown in the table below:

Advantages	Challenges
<ul style="list-style-type: none"> <li>• Varieties of superior U.S. high quality agricultural products from fresh to processed food</li> <li>• High opportunities exist for U.S. products targeting niche markets</li> </ul>	<ul style="list-style-type: none"> <li>• U.S. exporters have spotty or incomplete knowledge about the Thai market and at the same time face severe competition from China, Australia, New Zealand, Japan and other neighboring countries impedes the entry of U.S. products</li> </ul>
<ul style="list-style-type: none"> <li>• Increase of per capita income from \$3,000 in 2002 to \$3,182 in 2003</li> <li>• GDP for 2005 is projected at 5.9% and 6.8% in 2004</li> </ul>	<ul style="list-style-type: none"> <li>• U.S. products are not always price-competitive compared to imports from other Asian countries due to high tariffs, shipping costs and the long distance to Thailand</li> </ul>

<ul style="list-style-type: none"> <li>• Increase in Thai consumers' preference for higher quality products</li> <li>• U.S. and Thailand are negotiating a free trade agreement, which will enhance the competitiveness of American food and agricultural products in Thailand</li> </ul>	<ul style="list-style-type: none"> <li>• Bilateral free trade agreement between Thailand and other countries, particularly China, Australia, and India, induces the import of more low-price products from these trade partners</li> </ul>
<ul style="list-style-type: none"> <li>• Local Thai consumers view US-origin products as high quality and safe and are confident in U.S. foods and beverages consistency</li> </ul>	<ul style="list-style-type: none"> <li>• Local manufacturers can improve or change quality of products, tastes or packaging sizes according to changes in consumer behavior and can lower production cost</li> </ul>
<ul style="list-style-type: none"> <li>• Proliferation of retail industry. New retail outlets are expanding which allow consumers in any part of Thailand to get access to new imported products</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of importer and retailer knowledge and training in purchasing and handling of U.S. food products</li> <li>• Strong local brands which are either foreign or Thai origins in many food and beverage products e.g. Nestle, Singha Beer, etc.</li> </ul>
<ul style="list-style-type: none"> <li>• Eating style of Thai people is changing to include more imported food items</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of continuous promotion of U.S. varieties in Thai market. Exporters need to support market promotion campaigns to attract and then build new markets</li> </ul>
<ul style="list-style-type: none"> <li>• Increase in niche markets with higher incomes and high premium product preferences</li> </ul>	<ul style="list-style-type: none"> <li>• Market penetration for imported products is concentrated in Bangkok and major tourist-destination provinces mostly</li> </ul>
<ul style="list-style-type: none"> <li>• The booming tourism industry is ratcheting up demand for HRI products, especially U.S. beef, turkey, seafood, wine and seasonings which can be used in American, French, Japanese and other international style restaurants</li> </ul>	<ul style="list-style-type: none"> <li>• American style food products mass produced locally cost less</li> </ul>
<ul style="list-style-type: none"> <li>• Reliable supply of U.S. agricultural products and advanced U.S. food processing technology</li> </ul>	<ul style="list-style-type: none"> <li>• Thai government's policy and actions try to increase demands for Thai local products</li> <li>• Food safety concerns</li> </ul>
<ul style="list-style-type: none"> <li>• Government's policy to support the development of value-added production, this will boost the demand of food ingredients, especially new ingredients</li> </ul>	<ul style="list-style-type: none"> <li>• Some food ingredients can be produced locally</li> </ul>
<ul style="list-style-type: none"> <li>• Good relationships with foreign suppliers</li> </ul>	<ul style="list-style-type: none"> <li>• High import tariffs on high value consumer food and beverage products, especially U.S. meat products, wine, whiskies, cherries, peaches, plums, pears, French fries, etc.</li> </ul>
<ul style="list-style-type: none"> <li>• Thai importers prefer to deal with quality and reliable U.S. suppliers who are able to supply products at competitive prices</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of trader and consumer awareness of U.S. products, while marketing costs to increase consumer awareness are high</li> </ul>

<ul style="list-style-type: none"> <li>• Thailand's beneficial geographical location is viewed as a gateway to the larger Indochina and other Asian markets</li> </ul>	<ul style="list-style-type: none"> <li>• Due to the high import tariffs on U.S. products, most Thai importers have shifted to import products from other Asian countries, especially Australia, China, Malaysia, and Singapore</li> </ul>
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## Section II. Exporter Business Tips

The following are a number of thoughts, collected from a variety of sources, on exporting food products to Thailand. Some are obvious, but warrant repeating; some you may never have considered. They are organized under three topics: communicating, meeting, and exporting. We hope these suggestions will prove useful in your efforts to build food exports to Thailand.

### Communicating

- When greeting a Thai, use the word Khun (pronounced coon) in place of "Mr." or "Mrs." and the person's first name, which is listed first on his or her business card. For example, a Westerner with the name "Peter Moore" would be called "Khun Peter". Among Thais, family names are not usually used. Most Thais refer to each other by their first names only. Never refer to yourself with the word Khun; simply say your first name. Thais will probably address you by using "Mr." or "Mrs." and your first name.
- Introductions: foreign companies may write directly to Thai companies, although personal introductions will always enhance a firm's credibility and acceptance.
- Most Thais greet someone by bowing slightly towards them while bringing the hands pressed together in a praying position between the chest and forehead. The exact location of the hand depends on the level of respect being offered — the height and depth of a person's bow indicates social status. This gesture, known as a "wai", can be used when greeting someone on arrival and departure, and also when saying, "I am sorry" or "thank you." There is no need to wai taxi drivers, secretaries, clerks, and other support or service people.
- It would behoove foreign businesses to hire a representative or agent with local connections, especially if they intend to buy from or sell to Thailand. Assess any local representative or partner's political relationship, as the government is still very much involved in the private sector. Networking with government officials and/or correct authorities can be the key to doing business successfully, especially if your firm intends to do a major project. Although a local representative is often the best choice, monitor your representative closely and require measurable performance.
- Keep in mind that in most of Asia that dates are shown in day/month/year format, ex. 5/12/04 means December 5, 2004. To avoid confusion, you may want to use the full date in correspondence.
- Have some fun and try to learn a few words of the local language, especially social greetings. This shows to all your interest in the country.

### Meetings

- Avoid business visits during the New Year Festivals (both the Chinese and Thai ones).
- Heavy traffic is the most common excuse for tardiness. Whenever possible, avoid scheduling meetings after 3:30 p.m. because locals often leave their office early to get a head start on evening rush-hour traffic.

- Business cards are always exchanged at the first meeting. It is important to carry a sufficient quantity; failure to offer a business card may make Thais suspicious of your position and authority. Be sure your card indicates your position and responsibility. And be sure to have your personal information in Thai on the back of the card. Don't throw or slide your card. Don't put the other person's card in your pocket until the meeting is over. Don't write on his/her personal card.
- Begin initial meetings with casual conversation on such topics as your travels, the beauties of Thailand, possibly questions about your counterpart's overseas experiences.
- Avoid topics relating to politics, the royal family, and religion. A little praise of the country and the Thai people goes a long way.
- Never touch or point with your feet. It is consider rude to cross your legs and point your feet at someone. Thais place a great importance on appearance and politeness.

## Exporting

- It is essential to visit the market to conduct market research, especially for product testing, price comparisons, and for reviewing export statistics of the last 3-5 years.
- Localize your products: adjusting the product for local tastes, verifying consumers' preferences and setting your products' price to be very competitive.
- U.S. exporters should locate the best distribution channel (e.g. local importers, distributors, supermarkets, retailers, etc.) and establish a good relationship with them, as they are very useful in facilitating and promoting exports of U.S. consumer-ready foods to Thailand.
- Trade fair participation is another way to raise awareness of your product.
- In Thailand, most large manufacturers and retailers import raw materials or products directly while medium, small manufacturers, retailers, as well as hotels, prefer to purchase products from local importers. But there are exceptions to this rule.
- Successful 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 as Australia and New Zealand are just a phone call away in a similar time zone.
- Understand that there is likely only one decision-maker in a company, and that person often is not the purchasing manager.
- Product Registration: Applications for product registration should be submitted to the Food 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 the 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 middle to upper income groups have an aversion to low quality products and are attracted to branded products. They also tend to be image conscious. Existing brand loyalties are most likely to be broken by new products that are of good quality, well packaged, distributed, 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 finalized.
- Study the most recent Food and Agriculture Import Regulations and Standards (FAIRS) Report for Thailand. This concise document - covering food laws, labeling requirements, food additive regulations, pesticide and other contaminants, import



procedure and other key regulations, requirements and specific standards-should be required reading for all exporters and is available on the internet at <http://www.fas.usda.gov/gainfiles/200407/146106948.pdf>

- Contact, after reviewing the foregoing, the Foreign Agricultural Service in the U.S. Embassy, Bangkok ([agbangkok@fas.usda.gov](mailto:agbangkok@fas.usda.gov)) with any remaining questions on issues such as standard, tariffs, regulations, labeling, and other concerns.

### Section III. Market Sector Structure & Trends Consumption

#### All Consumer Expenditure on Food

According to Euromonitor, one notable trend is the large proportion of consumer expenditure on retail food. In 2003, retail accounted for more than 70% of total consumer expenditure on food. Conversely, consumers are allocating a lower proportion of their expenditure to food service, reflecting a general tendency among Thais to cook at home rather than dining out, particularly among residents living in rural areas. This coincides with a preference among consumers for traditional cooking methods and authenticity styles of cuisine.

<b>Retail &amp; Food Service Market Share of Consumer Expenditure</b>					
(Millions; Bt per year; % of total )					
	1999	2000	2001	2002	2003
<b>Retail</b>	<b>559,065</b>	<b>598,630</b>	<b>645,998</b>	<b>690,384</b>	<b>732,497</b>
%	71.87	72.56	73.35	73.56	73.27
<b>Food Service</b>	<b>218,772</b>	<b>226,359</b>	<b>234,691</b>	<b>248,160</b>	<b>267,268</b>
%	28.13	27.44	26.65	26.44	26.73
<b>Total</b>	<b>777,837</b>	<b>824,989</b>	<b>880,689</b>	<b>938,544</b>	<b>999,765</b>

Source: Euromonitor

However, expenditure on food service registered an increase of 8% in 2003. An increase in eating out and patronizing restaurants specially prominent among the younger generation, as well as working professionals, as it is more convenient and efficient than cooking at home. Furthermore, the increasing number of food establishments in the market also resulted in a considerable increase in food service sales.

<b>Consumer Foodservice by Sector</b>					
(Millions; Bt per year; % of total )					
	1999	2000	2001	2002	2003
<b>Cafes/bars</b>	<b>1,745</b>	<b>1,955</b>	<b>2,215</b>	<b>2,414</b>	<b>2,647</b>
%	1.95	2.09	2.27	2.36	2.47
<b>Full-service restaurants</b>	<b>14,150</b>	<b>14,929</b>	<b>15,587</b>	<b>16,358</b>	<b>17,225</b>
%	15.81	15.96	15.96	16.03	16.08
<b>Fast food</b>	<b>2,585</b>	<b>2,902</b>	<b>3,341</b>	<b>3,727</b>	<b>4,181</b>
%	2.89	3.10	3.42	3.65	3.90
<b>Home delivery/takeaway</b>	<b>2,543</b>	<b>2,645</b>	<b>2,734</b>	<b>2,844</b>	<b>2,967</b>
%	2.84	2.83	2.80	2.79	2.77
<b>Self-service cafeterias</b>	<b>530</b>	<b>552</b>	<b>582</b>	<b>616</b>	<b>657</b>
%	0.59	0.59	0.60	0.60	0.61
<b>Street stalls/ kiosks</b>	<b>67,964</b>	<b>70,583</b>	<b>73,180</b>	<b>76,115</b>	<b>79,419</b>
%	75.92	75.44	74.95	74.57	74.16
<b>Total</b>	<b>89,517</b>	<b>93,566</b>	<b>97,639</b>	<b>102,074</b>	<b>107,096</b>

Source: Euromonitor

### Tourism Spending

In 2003, tourists spent 28% on shopping activities – the largest share. This trend is mainly fueled by a favorable exchange rate and aggressive promotions in Thailand's retailing market. In general, low cost products and different retail concepts attract tourists, ranging from department stores to large-scale flea markets. Accommodation constitutes a significant 25% share of total tourism expenditure in 2003. Finally, travel within the country also registered positive, albeit sluggish growth in 2003. Domestic tourism became more active after the outbreak of SARS, as the majority of Thais adopted a cautious attitude towards traveling. Active promotions, such as the new campaign *Unseen Thailand*, by the government are also encouraging an increase in domestic tourism.

<b>Tourism Spending</b>					
(Millions; Bt per year; % of total )					
	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>
<b>Accommodation</b>	<b>111,052</b>	<b>121,114</b>	<b>125,862</b>	<b>126,985</b>	<b>125,700</b>
%	26.73	25.71	25.27	24.53	24.75
<b>Entertainment</b>	<b>34,526</b>	<b>40,438</b>	<b>44,557</b>	<b>48,754</b>	<b>46,715</b>
%	8.31	8.59	8.94	9.42	9.20
<b>Excursion</b>	<b>32,673</b>	<b>38,153</b>	<b>42,258</b>	<b>44,715</b>	<b>42,953</b>
%	7.86	8.10	8.48	8.64	8.46
<b>Food</b>	<b>69,466</b>	<b>77,640</b>	<b>81,896</b>	<b>84,516</b>	<b>82,550</b>
%	16.72	16.48	16.44	16.33	16.25
<b>Shopping</b>	<b>115,642</b>	<b>132,026</b>	<b>140,930</b>	<b>145,780</b>	<b>144,125</b>
%	27.84	28.03	28.29	28.16	28.37
<b>Travel within country</b>	<b>35,698</b>	<b>42,297</b>	<b>46,204</b>	<b>48,795</b>	<b>49,180</b>
%	8.59	8.98	9.28	9.43	9.68
<b>Other expenses</b>	<b>16,391</b>	<b>19,362</b>	<b>16,420</b>	<b>18,150</b>	<b>16,715</b>
%	3.95	4.11	3.30	3.51	3.29
<b>Total</b>	<b>415,448</b>	<b>471,030</b>	<b>498,127</b>	<b>517,695</b>	<b>507,938</b>

Source: Euromonitor

### A) Retail Sector

Thailand's retail trade sector is a vital component of the Thai economy accounting for an 8% share of GDP and 4% of total employment. The growth of retail trade is attributable to the higher purchasing power of households as a result of the general economic recovery, better employment conditions, low inflation, and low interest rates that helped increase the extension of consumer and housing credits. Thailand's retail sector experienced a rapid increase in new investments from both local and foreign players in 2003 despite economic uncertainty. Driven by its hypermarkets and convenience stores, Thailand is the second most dynamic retail market in Asia after China. About an 8% increase in sales for the traditional trade sector is expected, while in the modern sector sales are seen rising 18%. According to AC Nielsen's annual survey, the average Thai consumer spent \$140 per month on retail products; this retail spending accounted for 31% of household income.

Multinational retailers have dominated Thailand's modern food retail market with continued aggressive store expansion in 2000-2002, especially in the hypermarket segment. The majority of these investments have come from the leading international retail chains: UK-based Tesco with its Tesco Lotus stores; France-based Casino Group with BigC; Carrefour of France; and Netherlands-based Makro. These modern trade companies, especially the larger firms, represent excellent opportunities for U.S. exporters of consumer food items. Intense competition in the retail market, particularly from these large-scale modern traders who use price strategies and loan extensions to low-income consumers, led to the closure of many

traditional stores. As a result, the retail market structure continually changes, with modern retailers such as hypermarkets, supermarkets and convenience stores continuously gaining market share and traditional retailers gradually losing their position.

<b>Overall Retail Food Market Share &amp; Outlet Expansion</b>					
<b>Type of Business</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>
Traditional Sector %	70	60	46	36	N/A
Modern Trade Sector %	30	40	54	64	N/A
<b>Category (retail outlet expansion)</b>					
Convenience Store	4500	5500	5700	6000	6500
Department stores	112	103	108	109	109
Hypermarkets	63	77	97	113	130
Supermarkets	138	150	170	208	238
Specialty stores	150	206	239	198	290
Source: USDA Foreign Agricultural Service - Bangkok, Thailand					

Since the beginning of 2003, hypermarket expansion in Bangkok is experiencing a deceleration in growth, given the fewer new hypermarket construction projects underway due to the difficulty in locating new business opportunities/areas for further store expansion. It is projected that retail business competition in the future will be more in the form of innovative channels to meet consumer demand; branches to cover more areas, and searching for newer and better products to offer to customers. In addition, the flow of local shoppers has been diverted from department stores, wet markets and grocery stores to hypermarkets and supermarkets. Therefore, supermarkets and hypermarkets are the best method of entry for U.S. exporters to enter Thailand's retail food market and offer a variety of quality products at competitive prices to satisfy Thai customers' desires.

Large convenience store chains like CP's 7-Eleven are recommended for selected foodstuffs. The CP group is redesigning 7-Eleven outlets to focus more on food products by raising the number of food items to be 90% of total products, up from 70%, or 1,700 items at present. The main factors U.S. exporters should consider for U.S. food products are pricing, shelf life of the product, and customer preferences. The traditional 'Mom and Pop' stores and wet markets in Thailand are not ideal entry points for U.S. exporters as price sensitivity and preferences for traditional diets by the end consumers in this sector are not a good match. U.S. exporters should be aware that many U.S. branded food products such as snack foods, candy, chocolate and breakfast cereals are present in the market as locally or regionally produced food products. The ASEAN Free Trade Area (AFTA) is one of the major factors contributing to a shift in manufacturing bases within the region.

Most of the supermarkets and hypermarkets in Thailand have their own house brands for ready-to-eat foods, ready-to-cook prepared foods, home-made bakery items, TV dinners, sausages, water, cooking oil, rice, sauces, cereals, dairy products and fruit juice. Thai consumers are moving toward these house brand items for some particular products due to their cheaper prices, especially food items when they cannot differentiate the products' value - especially items such as sugar, fish sauce, bottled water, etc. These outlets also provide space for fast food outlets, kiosks, a laundry, a florist, bookstores, a photographic store, movie rental stores and restaurants. They also have their own distribution centers to ensure product freshness and operation efficiency.

**Entry Strategy**

The best method for U.S. exporters to sell to supermarkets, hypermarkets or cash and carry is to directly contact supermarkets, discount stores, hypermarkets, and cash and carry who import direct, and to contact importers and distributors. 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 SKU (stock keeping unit).

**Distribution Channels**

The distribution channel to supermarkets, cash and carry, and hypermarkets in Thailand normally begins with importers and goes to distributors, then to a central warehouse or direct to retail outlets. The foodstuffs will be kept either in the importers' warehouse, distributors' warehouse, or a central warehouse before delivery. Some supermarkets, superstores and hypermarkets operated by multinational operators import food products directly and keep them at their own distribution centers before delivery to each outlet.

**B) Convenience Stores, Gas Marts & Kiosks****Entry Strategy**

The best method for U.S. exporters to enter this Thai market segment is to contact the head office of convenience stores, gas marts and kiosks. The major convenience stores like CP 7-Eleven and FamilyMart are listed at the end of this report. U.S. exporters should be aware of the listing fee or listing allowance 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 SKU.

U.S. branded food sold in these C-stores is generally produced in Thailand or in neighboring Southeast Asian countries. This group of products includes snack foods, chocolates, cookies, candies, gums and breakfast cereal. Distributors import U.S. branded food from neighboring countries rather than from the United States because of the low cost and AFTA preferential tariffs. Trends in the sales of imported food for C-stores versus locally produced will decrease gradually from five to zero percent, in line with the purchasing power of the target group. U.S. products will be well received by Thai consumers in C-stores if price and quality is similar to what local suppliers offer.

**Distribution Channels**

A common distribution channel to convenience stores, gas marts and kiosks flows from U.S. exporters to U.S. consolidators and traders keep to Thai distributors then deliver 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 baked goods and 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 control of their own distribution centers.

**C) Traditional Markets: 'Mom and Pop', small independent grocery stores and wet markets.**

**Entry Strategy**

For U.S. exporters, Thai traditional wet markets are more difficult markets to enter considering the expected purchase price of products, low consumer purchasing power, the size and traditional distribution channels of the outlets, and consumer preference for traditional Thai and Chinese food.

**Distribution Channels**

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

### **Best Market Prospects**

The best market prospects for U.S. suppliers include breakfast cereal, frozen sea food (scallop, lobster, fish, mussel), fruit juices, instant and ground coffee, jam, nuts (walnuts, hazel nuts, macadamia nuts), canned soup and fruits, candy, chocolate, chocolate milk mix, dairy products (milk powder, cheese, cheese spread, cream cheese, whipped cream, sour cream, cheese sticks, cheese dip and ice-cream), dips, fresh fruits (cherries, grapes, peach, plums, nectarine, berries, grapefruit, apples), frozen pizza, frozen peas, pie filling, micro wave pop-corn, frozen processed turkey, dried fruits, pickles, red meat, American spices, seasonings and sauces, snack foods, syrup, vinegar, wine, spirits and pet food.

The best selling U.S. food products are U.S. beef (prior to the import ban), grapes, frozen French fries, snack foods, breakfast cereal, wine, nutritional products, and pet foods. Products that are not currently present in the market in significant quantities but have excellent sales potential are American seafood including scallops, Alaska King crab legs, halibut and other fishes, fruit juices, biscuits, candy, cherries, peaches, pears, plums, nectarines, chocolate milk mix, cheese, dip sauce, chili sauce, Mexican sauce, other cooking products, peanut butter, pie filling, turkey and whipped cream.

### **Further Information**

Further information on this area is available in *A Market Brief on Thailand's Retail Food Sector Report 2002* (GAIN Report #TH2116) which can be obtained from the FAS homepage at <http://www.fas.usda.gov>

### **HRI Food Service Sector**

Thailand's large HRI food service sector comprises approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. Hotels, resorts, restaurants and institutional contracts are the heavy users of imported food for food preparation and ready-to-eat meals at restaurants, catering services for airlines and cruise lines. This is because this sector attract middle to higher income Thais, Thai corporate businessmen, resident expatriates and tourists. Thailand tourism is an important component of the service sector that last year generated approximately 323 billion baht (\$7.5 billion) in revenue. This industry is one of the key factors behind Thailand's quick economic recovery. In 2003, the international tourist arrivals to Thailand reached 10 million and total income from all tourism-related business was about Baht 309 billion (\$7.5 billion). Food and beverage sales of hotels and resorts accounts for about 30% of total revenues. The average rate of imported food versus locally produced food in the entire HRI sector is 30%; the U.S. has approximately 20% of the imported product share. U.S. beef, seafood (lobster, Alaska king crab legs, scallops, etc.), wine, potato, seasonings, etc are well known in the hotel/restaurant trade, and with airline catering companies. Thai Airways International uses 30-40% imported food in their in-flight catering service.

General restaurants have been replaced by restaurants chains such as Oishi, Fuji, Zen, S&P, Black Canyon, MK Suki, Seefah Restaurant, etc. Sidewalk restaurants have been continually replaced by food centers and food courts which are more hygienic and more convenient. Food centers and food courts can be seen in most of the department stores and office buildings. Fast food and chain restaurants have boomed for the last few years and are expected to continue to do so for the next few years. Hot and cold drinks including coffee and ready-to-eat foods are served in convenience stores and stand alone outlets.

## 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. It is easier for hotels and resorts to order from food service companies because they have specialized 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, Phuket, Hua Hin, Krabi, Chiang Mai, and Pattaya 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 U.S. cold water fish such as halibut, king salmon, cod, Alaska king crab, scallop, mussels, and oysters; spices, seasonings and sauces; baking products, canned foods (soup, fruit and vegetables), dairy products (cheese, cheese spread, cream cheese, whipped cream, sour cream, cheese dip, ice-cream, dips), fresh fruits and vegetables (radish, celery, carrots, apples, grapes, cherries, kiwi fruit, avocados, blueberries, grapefruit, oranges), frozen berries, pie fillings, frozen peas, fruit juice (apple, prune, orange, grape, sparkling white grape), jam and jelly, Mexican sauce, nuts (walnuts, hazel nuts, macadamia nuts), dried fruits, pickles, ready-to-mix pancakes, cookies, muffins and cake, syrup, tortilla chips, U.S. beef, turkey, vinegar, wine and whisky.

## Food Processing Sector

Thailand has become one of the leading food producers in the world and is the largest food exporter among all Southeast Asian countries. There are over 10,000 food processing companies in Thailand, the majority (80%) of which are small sized establishments and cottage industries. Among the 15% that are medium and large enterprises (1,234 listed companies), most are cold storage plants (20.8%) followed by producers of grain and cassava items (17.8%), frozen meat including poultry meat (10.9%), starch (10.0%), canned fruit and vegetables (7.4%), fat and oil (7.3%), sugar and honey (5.9%), coffee and tea (4.9%), canned meat and seafood (3.9%), snacks (3.2%), and others (8.3%).

Currently, Thailand is among the top food-exporting countries in the world. Annually, the industry imports food ingredients approximately \$1.8 billion (The U.S. accounts for about 30% market share), and this trend will increase in the future. Although domestic ingredients hold the greatest share of the market, these items tend to be low-value, high-volume raw and semi-processed products such as grains, vegetable oils, and starches. Higher value and more technology-based ingredients are generally not available locally and must be imported. The food ingredient market is growing continuously due to increases in population and in purchasing power; increases in the number of dual income families; and new product development.

Followings are some general characteristics of the Thai food processing industry:

- The Thai market for raw materials is growing. Raw inputs to the food processing sector are primarily supplied by Thai companies. Nevertheless, the import market for these ingredients has been growing continuously. The growth in demand for raw

materials is due to the increased localized production of processed products that are in high demand and are expensive to ship long distances;

- Many Thai retail stores are modernizing and increasing their capacity in the refrigerated and frozen foods sections. In addition, modern logistics and technology are being introduced by multinational retail chains to the market;
- Major retail chains purchase directly from processed food producers;
- Increased local production of some traditionally imported foods. Snack foods, salad dressings, sauces, jams and other processed foods that are relatively inexpensive but have high freight costs will be increasingly produced locally;
- An increase in the trend of using imported ingredients for innovative products;
- A move toward higher quality ingredients. There are some companies moving towards using better quality ingredients instead of ingredients chosen on the sole basis of cost;
- High investment in capital equipment, improvements in food technology, more stringent sanitary requirements, marketing innovations, and Thai exports of finished food products all have contributed to the increasing demand for food ingredients. Major food exporters have expanded their production capacity through new machinery purchases or upgrades to meet demand for a variety of products in the major markets and to satisfy international quality standards including HACCP and ISO.

Fish and seafood, dried fruits, soybean, milk products, cereals, fat and oils, starches and derivatives, fresh fruit and vegetable products, and coloring were the leading volume imported food ingredients in Thailand. The larger food processors tend to be the ones which are more export-oriented, their major markets being Japan, the U.S. and the EU. Accordingly, Thailand must produce products of a quality necessary to meet international standards.

The country is a leading supplier of a wide variety of commodities and/or products including rice, rubber, cassava, sugar, seafood, poultry meat, frozen, ready-to-eat foods, and fresh hand processed fruits and vegetables. Thailand's food processing sector is heavily export-oriented with more than 50% of production sold outside the country. Approximately 67% of exports are processed seafood products. Thai food processors import large quantities of food ingredients for the food processing industry which are not available locally.

Thailand's processed food exports have been increasing continuously, due to a number of factors: the government's efforts to improve the quality of local industries' output to export quality; the processed food sector's efforts to raise quality and sanitation standards; and the introduction of new, ready-to-cook products, mainly for the Japanese and EU markets. Domestic processed food consumption continues to grow, following the increase in Thailand's population, accompanied by a higher proportion of processed food and beverages consumed as income and lifestyles change. Although domestic ingredients hold the largest share of the market, at the moment, these items tend to be low value, high volume, raw and semi-processed products such as grains, vegetable oils, and starches. Higher value and further processed products are generally not available locally and must be imported. All this expected expansion in the food processing industry should provide many export opportunities for U.S. exporters of food ingredients in the medium- and long- term as this market segment continues to expand.

The Thai food and beverage manufacturing industry has a broader base than many other Southeast Asian food and beverage manufacturing industries. Most of the major Thai food processing companies are also involved in exporting their products to overseas markets. Several trends are influencing the type and quality of inputs used in processed foods:

- Thailand's open trading environment has stimulated the extensive use of imported ingredients by the local food processing industry. This has enabled the industry to experiment and introduce a wide range of new processed products to the market, e.g. prepared frozen foods, processed meats, and new age beverages;
- Thai people have an increased awareness about their health and nutrition. Macrobiotic foods, vegetarian foods, and health foods have become popular in recent years. Although the scope of the healthy foods business is smaller and less advanced compared to Western countries, Thai consumers are steadily becoming more health-conscious and demanding more flavor-intensive convenient health foods;
- Changes in the retail sector have driven changes in the processing sector. The trend in the retail sector is away from small grocery stores and towards supermarkets and hypermarkets. Currently there are approximately over 700 branches of supermarkets and hypermarkets in Thailand. Consumer expectations have also changed significantly. Faced with an increasingly diverse range of products, quality and price, consumers have become more demanding. In response to increasing consumer expectations, large food retailers, especially international companies, are demanding that Thai food manufacturers meet higher quality standards;
- The rapid change in consumption patterns has led Thai food processors to begin investing in ready-to-eat meals and frozen food products;
- The snack foods industry is also benefiting from the trend toward Western foods and more entertainment and tourist centers throughout the country. The increasing popularity of mini-marts and convenience stores are the driving force in the snack foods market. There are over 15 large manufacturers of snack foods in Thailand and a large number of small firms supply snacks to the local market. Several of the larger manufacturers are increasing exports to other Asian countries, Europe and the U.S.;
- The international food chains industry is expanding rapidly, both in the numbers of companies entering the market and in the number of outlets due to the changing life style and the booming tourist industry. Most of the major international fast food companies are represented in Thailand, including McDonalds, Burger King, KFC, A&W, Pizza Hut, The Pizza, Auntie-Anne's, Baskin Robbins, Swensen's, Delifrance, Starbuck coffee house, Subway, etc. The rapid growth of the fast food sector is stimulating many businesses such as bakery products, dairy products, meat and poultry, etc.;
- Thailand's seafood processing sector is the fourth largest in Asia after Japan, China, and India. More than 90% of its output is bound for export markets, so continual improvements in production quality are being made to maintain and expand demand. Canned and frozen products account for 80% of the output. The leading products are canned tuna, frozen prawns, squid, and assorted fish.

### Entry Strategy

The most effective way for U.S. food ingredients exporters to enter the Thai market is either appoint a reputable and experienced local importer/distributor or contact directly to the food manufacturers. Local firms usually have a good understanding of the market and know how to make direct contact with food manufacturers, government officials and other key contacts. A good local importer/distributor can also provide valuable support in arranging meetings with the manufacturers especially their R&D and manufacturing divisions, translating technical information, and help arrange other marketing and sales activities. Trade shows are also highly effective ways to promote new food ingredient products. Food Ingredients Asia, which will be held in Thailand in 2006, is usually well attended by Thai and neighboring country food companies.

U.S. market development cooperators are also active in Thailand and other Southeast Asia countries. These groups offer many marketing opportunities for U.S. firms, including trade team visits, technical seminars, local promotional events, and other activities. Cooperators with active programs in Thailand and other regional countries include the U.S. Grains



Council, U.S. Meat Export Federation, U.S. Poultry & Egg Export Council, U.S. Dry Pea and Lentil Council, U.S. Dairy Export Council, California Raisin Administrative Committee, U.S. Wheat Association, American Soybean Association, U.S. Potato Board, 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**

The best market prospects for food processing include wheat, maize, dehydrated potatoes, soybeans, nuts and dried fruits, food chemicals and additives, flavorings, starch, meat, whey, skim milk powder and juice concentrates.

### **Distribution System**

In Thailand, the distribution channel for retailers, hotels, restaurants, institutional contractors and food processors is very similar. The distribution channel to supermarkets 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/ traders to Thai distributors to C-stores, gas marts and kiosk distribution centers. The flow pattern of the 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, food manufacturers are increasingly importing directly from foreign supplies. 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

RANK	PRODUCT	2002				2003				
		TOTAL IMPORT VALUE (US\$)	U.S. IMPORTS VALUE (US\$)	U.S. %SHARE (VOLUME)	U.S. Growth Rate %	TOTAL IMPORT VALUE (US\$)	US IMPORTS VALUE (US\$)	U.S. %SHARE (VOLUME)	Mkt. Growth Rate %	U.S. Growth Rate %
1	TUNAS	438,026,555.47	2,672,889.85	0.57%	-34.15%	502,079,932.00	3,582,254.00	0.70%	17.48%	50.15
2	POWDER MILK & CREAM	177,459,329.91	6,073,071.28	4.62%	85.38%	177,178,469.00	6,041,106.00	4.62%	0.00%	0.00
3	WHISKIES	71,899,012.29	1,008,069.90	0.73%	-17.52%	89,645,267.00	1,278,316.00	1.05%	14.77%	68.01
4	APPLE (FRESH)	39,867,673.74	11,744,643.51	22.64%	-21.12%	57,719,540.00	10,546,942.00	12.43%	40.86%	-7.14
5	SALMON (FROZEN,FRESH, CHILLED)	42,370,754.47	3,900,337.36	20.61%	-30.56%	51,350,037.00	4,145,972.00	16.50%	0.68%	-19.40
6	MILKFOOD FOR INFANTS	31,682,425.21	204,002.30	0.43%	93.79%	51,023,905.00	127,029.00	0.25%	22.55%	-26.04
7	CRABS	25,085,577.91	1,152,404.91	3.56%	-66.43%	25,753,883.00	1,691,297.00	7.75%	-14.87%	89.51
8	CHOCOLATE & FOOD PREP. WITH COCOA	17,238,452.72	2,942,834.03	15.00%	38.55%	19,855,546.00	2,952,025.00	12.43%	20.57%	4.30
9	SUGAR CONFECTIONERY	16,708,202.42	157,784.87	0.76%	-21.35%	17,351,391.00	209,534.00	0.87%	-5.39%	9.20
10	MACKEREL	15,475,707.40	35,582.98	0.29%	378.63%	16,317,256.00	357,584.00	1.72%	5.13%	521.81
11	GRAPES, FRESH	7,046,412.50	3,999,319.67	51.02%	2.90%	14,695,578.00	7,311,738.00	46.66%	51.84%	89.88
12	PEARS & QUINCES	3,531,403.89	496.49	0.02%	-95.89%	14,462,809.00	9,624.00	0.03%	79.26%	891.02
13	DOG AND CAT FOOD	11,666,288.83	4,104,740.83	22.15%	1.46%	13,072,905.00	4,439,600.00	31.93%	1.34%	46.07
14	FRUIT & VEGETABLE JUICE	4,542,730.73	835,426.40	11.53%	-68.63%	12,740,926.00	2,602,895.00	15.09%	57.73%	209.45
15	COD	11,449,293.20	1,041,263.57	10.32%	35.39%	12,293,677.00	620,213.00	5.65%	-6.83%	-48.78
16	INSTANT COFFEE	9,629,740.55	192,901.40	3.83%	124.33%	12,028,770.00	403,607.00	0.47%	72.80%	-54.74
17	CANNED PEACH	12,439,227.51	687,620.18	4.67%	-51.88%	9,438,650.00	4,080,626.00	41.74%	-52.34%	486.96
18	FROZEN FRIES	7,351,776.23	5,031,943.37	69.80%	8.79%	9,031,880.00	5,670,314.00	63.09%	12.70%	3.51
19	CHEESE & CURD	6,709,269.37	348,813.57	3.81%	-50.55%	8,372,817.00	273,901.00	2.81%	18.55%	-9.35
20	POPCORN (READY TO EAT)	3,306,762.69	1,218,722.77	35.83%	-10.63%	8,280,362.00	160,717.00	1.65%	55.23%	-89.73
21	WINE	6,942,750.47	247,995.55	3.97%	-34.76%	7,046,482.00	319,862.00	4.36%	-3.32%	6.28
22	BREAKFAST CEREAL	4,517,366.36	97,605.56	1.47%	-44.43%	5,655,781.00	213,763.00	2.87%	11.00%	119.64
23	SOUPS & BROTHS & PREPARATION	3,369,845.90	744,757.01	47.23%	-2.04%	4,384,278.00	1,472,385.00	47.66%	32.50%	49.53
24	DRIED PEAS, BEANS, LENTILS	2,202,062.83	171,361.41	2.06%	25.37%	4,056,483.00	426,852.00	4.76%	33.03%	244.77
25	INSTANT TEA	1,227,776.16	1,104,733.78	86.51%	-44.44%	3,670,164.00	705,516.00	1.79%	96.68%	-37.71
26	BEER	1,727,027.14	53,806.31	2.45%	1.39%	2,947,800.00	37,209.00	1.17%	0.15%	-52.45
27	ALMONDS, FRESH/DRIED IN SHELL & SHELLED	1,658,351.00	1,589,740.57	95.48%	1.98%	2,656,893.00	2,641,758.00	99.41%	26.24%	41.17
28	BEEF	2,692,857.54	654,649.46	26.03%	19.36%	2,548,999.00	705,141.00	26.83%	-28.25%	-19.63
29	CORN (RAW)	1,550,083.64	875,655.59	42.05%	-26.80%	2,305,075.00	787,027.00	12.63%	59.31%	-26.16
30	JAMS, FRUIT JELLIES	1,840,850.12	765,390.22	38.29%	8.10%	2,097,037.00	814,526.00	35.39%	6.04%	-1.64
31	ICE CREAM	1,502,896.14	263,819.74	12.77%	-49.23%	1,794,132.00	56,529.00	1.64%	23.93%	-83.16
32	TOMATO KETCHUP & OTHER TOMATO SAUCES	969,331.17	504,721.74	42.72%	46.90%	1,676,090.00	315,317.00	14.57%	45.92%	-36.96
33	SCALLOPS/CLAMS	467,823.39	42,224.37	2.55%	-3.71%	1,285,192.00	108,069.00	2.53%	59.13%	142.68
34	COFFEE	750,459.33	580,739.18	71.93%	7.40%	1,237,741.00	952,858.00	41.62%	64.09%	61.11
35	OTHER NUTS INC MIXTURES	677,979.91	239,403.82	30.68%	113.51%	974,844.00	349,314.00	30.40%	20.63%	24.83
36	SARDINES	493,836.13	55,559.52	11.25%	50.87%	968,016.00	358,599.00	40.17%	53.46%	667.30
37	ALMOND (ROASTED)	2,750.21	2,037.22	38.46%	-57.82%	810,162.00	12,601.00	64.30%	84.75%	996.55
38	PISTACHIOS, FRESH/DRIED	622,654.77	497,458.99	69.16%	17.66%	747,954.00	599,967.00	68.59%	22.06%	27.25
39	ORANGE (MANDARIN, TANGERINES, SATSUMA)	426,760.71	111,773.63	21.67%	-10.01%	714,727.00	150,163.00	18.92%	37.24%	39.14
40	CHERRIES (FRESH)	339,370.32	167,209.24	49.89%	-22.81%	695,896.00	474,954.00	73.42%	59.45%	262.91
41	MUSTARD FLOUR & MEAL&PREPARED MUSTARD	602,362.36	256,358.12	49.55%	-13.63%	623,198.00	281,029.00	57.96%	-1.45%	15.31
42	MEAT OF SHEEP/LAMB	390,141.62	473.37	0.15%	100.00%	499,602.00	266.00	0.07%	17.73%	-44.05
43	RAISINS	248,075.07	223,169.51	90.43%	-12.86%	342,938.00	336,385.00	97.18%	24.68%	42.67
44	SAUSAGES & SIMILAR PRODUCTS OF MEAT	133,381.47	2,003.07	4.12%	-57.35%	295,547.00	9,053.00	8.53%	54.09%	351.54
45	GROUND NUTS	118,100.77	71,470.25	30.23%	-75.82%	271,990.00	81,115.00	12.00%	69.10%	28.46
46	PLUMS AND SLOES	81,111.36	56,313.57	73.71%	-42.05%	132,101.00	99,972.00	65.14%	53.49%	90.05
47	DOG FISH & OTHER SHARKS	163,325.56	99,249.98	61.90%	-25.74%	116,133.00	60,578.00	49.08%	-66.51%	-52.38
48	TURKEY & CUT OFFALS F/F	72,266.62	72,266.62	100.00%	46.23%	101,170.00	101,170.00	100.00%	30.07%	42.95
49	OTHER SPARKLING WINES	125,807.38	5,359.22	3.37%	-73.28%	97,951.00	3,040.00	5.00%	-26.77%	17.22
50	PEACHES, INCL NECTARINES	65,521.07	5,288.38	3.71%	-12.40%	54,028.00	8,480.00	12.29%	-215.07%	5.05

Source: Thai Customs Department and World Trade Atlas



## Section VI. Key Contacts & Further Information

### A) U.S. Department of Agriculture, Foreign Agricultural Service

The 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 following:

Local:	U.S. Mail:
Office of Agricultural Affairs	Office of Agricultural Affairs
U.S. Embassy	U.S. Embassy, Box 41
Pathumwan	APO AP 96546
Bangkok 10330 Thailand	
Tel: +662-205-5106	Key Contact(s):
Fax: +662-255-2907	Rodrick McSherry, Agricultural Counselor
E-mail: agbangkok@fas.usda.gov	Russ Nicely, Agricultural Attaché
Website: www.usdathailand.org	

### B) U.S. Department of Commerce, Commercial Service

Commercial Service is the global business solutions unit of the Department of Commerce. Offering small and mid-sized businesses for non-food or agricultural products' world-class market research, trade events that promote your product or service to qualified buyers, introductions to qualified buyers and distributors and counseling through every step of the export process. Questions or comments should be directed to:

Local:	U.S. Mail:
U.S. Embassy	US Commercial Service
U.S. Commercial Service	FCS Box 51
Pathumwan, Bangkok 10330	APO AP 96546
Tel: +66-2-205-5090	Key Contact(s):
Fax: +66-2-255-2915	Judy Reinke, Commercial Counselor
E-mail: bangkok.office.box@mail.doc.gov	Scott Shaw, Commercial Attaché
Website: www.buyusa.gov/thailand/en/	

### C) Cooperators

Contact any of the many U.S. non-profit organizations, representing U.S. agricultural products and exporters and do market development activities to promote the various U.S. commodities and high value products in Thailand and other Asian markets. Please note: some of these organizations are located in Thailand and others in neighboring countries such as Singapore have regional responsibilities.

#### U.S. Dairy Export Council

Southeast Asian Representative Office  
Pacrim Associates Limited  
11/14 Soi Ruam Rudee  
Wireless Road  
Bangkok 10330  
Tel. (662) 689-6311  
Fax (662) 689-6314  
E-mail: usdec@pacrimassociates.com

#### U.S. Dry Pea & Lentil Council

AgriSource Co.,Ltd.  
No. 416, 4 th Fl., Ambassador's Court  
76/1 Soi Langsuan  
Ploenchit Road  
Bangkok 10330  
Tel. (662) 251-8655/6, 251-8669, 251-8772  
Fax (662) 251-0390  
E-mail: agsource@loxinfo.co.th

**American Soybean Association**

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

**U.S. Meat Export Federation**

#15-03 Liat Towers  
541 Orchard Road  
Singapore 238881  
Tel: 656-733-4255-6  
Fax: 656-732-1977  
E- mail: singapore@usmef.com.sg

**Wine Institute of California**

Block 3 Alexandra Distripark  
Unit 08-22 Pasir Panyang Road  
Singapore 118383  
Tel: 656-278-3832  
Fax: 656- 278-4372  
E- mail: Richelieu@lieumktg.com.sg

**Pear Bureau Northwest**

Block 3 Alexandra Distripark  
Unit 08-22 Pasir Panyang Road  
Singapore 118383  
Tel: 656-278-3832  
Fax: 656- 278-4372  
E- mail: Richelieu@lieumktg.com.sg

**California Pistachio Commission**  
**California Table Grape Commission**  
**California Tree Fruit Agreement**

Block 3 Alexandra Distripark  
Unit 08-22 Pasir Panyang Road  
Singapore 118383  
Tel: 656-278-3832  
Fax: 656- 278-4372  
E- mail: Richelieu@lieumktg.com.sg

**USA Poultry & Egg Export Council**

#15-04 Liat Towers  
541, Orchard Road  
Singapore 238881  
Tel: 656-737-1726  
Fax: 656-737-1727  
E- mail: usapeec\_sing@pacific.net.sg

**U.S. Wheat Associates**

#15-02 Liat Towers  
541 Orchard Road  
Singapore 238881  
Tel: 656-737-4311  
Fax: 656-733-9359  
E- mail: msamson@uswheat.org

**United States Potato Board**

Block 3 Alexandra Distripark  
Unit 08-22 Pasir Panyang Road  
Singapore 118383  
Tel: 656-278-3832  
Fax: 656- 278-4372  
E- mail: Richelieu@lieumktg.com.sg

**Raisin Administrative Committee**

Block 3 Alexandra Distripark  
Unit 08-22 Pasir Panyang Road  
Singapore 118383  
Tel: 656-278-3832  
Fax: 656- 278-4372  
E- mail: Richelieu@lieumktg.com.sg

**Washington Apple Commission**

208 Ram-Inthra Soi 19, Ram-Inthra Road  
Bankhen, Anusao-waree  
Bangkok 10220, Thailand  
Tel. 662-521-2170  
Fax. 662-970-8208  
E-mail: pt@waapples.com

**D) American Chamber of Commerce in Thailand**

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

7 th Fl., Kian Gwan Building 1  
140 Wireless Road

Key Contact(s):  
Judy Benn, Executive Director

Bangkok 10330  
Tel. (662) 251-9266/7, 251-1605, 651-4473  
Fax (662) 255-2454  
E- mail: info@amchamthailand.com

### E) 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**

Director (Ms. Suchitra Setha-udom)  
Food Control Division  
Tivanont Road, Muang  
Nonthaburi 11000  
Tel. (662) 590-7178  
Fax (662) 591-8460  
E- mail: schitra@fda.moph.go.th

##### **Food Products from Animals**

Tivanont Road, Muang  
Nonthaburi 11000  
Tel. (662) 590-7207/8  
E- mail: food@fda.moph.go.th

##### **Food Products from Plants**

Tivanont Road, Muang  
Nonthaburi 11000  
Tel. (662) 590-7023  
E- mail: food@fda.moph.go.th

##### **Chemicals and Food Additives**

Tivanont Road, Muang  
Nonthaburi 11000  
Tel. (662) 590-7209, 590-7219  
E- mail: food@fda.moph.go.th

##### **Food for Special Purposes and Food Supplement**

Tivanont Road, Muang  
Nonthaburi 11000  
Tel. (662) 590-7205, 590-7098  
E- mail: food@fda.moph.go.th

##### **Other Food Products**

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

##### **Food Inspection**

Inspection Division  
Tivanont Road, Muang  
Nonthaburi 11000  
Tel. (662) 590-7323  
Fax (662) 591-8477  
E- mail: food@fda.moph.go.th

#### **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  
Sanam Bin Nam-Nonthaburi Road  
Nonthaburi 11000  
Tel. (662) 547-4737  
E- mail: cdtddf@moc.go.th

**Commodity Division**

Sanam Bin Nam-Nonthaburi Road  
Nonthaburi 11000  
Tel. (662) 547-4801

**Grain Division**

Sanam Bin Nam-Nonthaburi Road  
Nonthaburi 11000  
Tel. (662) 5474820

**Department of Livestock, Ministry of Agriculture and Cooperatives****Animal Quarantine Inspection Services**

Phyathai Road  
Bangkok 10400  
Tel. (662) 653-4444 Ext. 4110  
Fax (662) 653-4865  
E- mail: dcontrol8@dld.go.th

**Bangkok Seaport Animal Quarantine Station**

Klong Toey Port  
Bangkok 10110  
Tel. (662) 249-2112  
Fax (662) 249-4358

**Bangkok Airport Animal Quarantine Station**

Don Muang  
Bangkok 10900  
Tel. (662) 535-1546  
Fax (662) 535-1210

**Department of Fisheries, Ministry of Agriculture & Cooperatives****Marine Animals**

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

**Department of Agriculture, Ministry of Agriculture and Cooperatives****Plant Quarantine Subdivision**

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

**Plant Quarantine Control Post**

Cargo Building  
Donmuang Airport  
Bangkok 10900  
Tel. (662) 535-1435  
Fax (662) 523-6622  
E- mail: ard@doa.go.th

**Excise Department, Ministry of Finance****License of Alcoholic Beverages**

License Subdivision

Bureau of Tax Administration 1  
Excise Department  
1488 Nakhon Chaisri Road  
Bangkok 10300  
Tel. (662) 243-0525

**Department of Intellectual Property, Ministry of Commerce  
Application for Patent and Trademark  
Services and Information Division**

Department of Intellectual Property  
338 Rachadapisek Road  
Huay Kwang, Bangkok 10320  
Tel. (662) 275-4854  
Fax (662) 276-0061

**Customs Department, Ministry of Finance  
Import Formalities Division**

Klong Toey, Bangkok 10110  
Tel. (662) 249-4266, 671-5250  
Fax (662) 249-4297

**Legal Affairs Bureau**

Klong Toey, Bangkok 10110  
Tel. (662) 671-7560 Ext. 9310, 9311  
Fax (662) 671-7626

**F) Retailers**

**Siam Makro Company Limited**

3498 2nd Fl., Lard Prao Rd  
Klongchan, Bangkok  
Bangkok 10240, Thailand  
Tel. +662 704-7000 / 375-7000  
Fax. +662 375-8866

Key Contact(s):  
Mr Philip Cox, Food Director (Dry Grocery)  
Mr. Louis Lin, Food Director (Fresh Food)

**Big C Supercenter Co., Ltd**

Fl 7 Univest Building  
89/36 Rajadamri Road  
Lumpini, Pathumwan  
Bangkok 10330, Thailand  
Tel. +662 655-0666  
Fax. +662 655-5801-2

Key Contact(s):  
Mr. Yves Braibant, CEO  
Ms. Suwadee Chaiwarut, Marketing and PR  
Director

**Tesco Lotus**

699 18th Floor, Modernform Tower  
Srinakrarin Rd, Suanluang  
Bangkok 10250, Thailand  
Tel. +662 722-9640-79  
Fax. +662 722-9682/9684

Key Contact(s):  
Mr Mike Raycraft, CEO  
Mr. David Horton, VP Fresh Food  
Development  
Mr. Chaiyasit Rachapithag, VP Dry Grocery

**Tops Supermarket, Central Food Retail Company Limited**

6th-7th Floor Central Plaza Office Tower  
1693 Paholyothin Road  
Lard Yaow, Jatujak  
Bangkok 10900  
Tel. +662 937-1700  
Fax. +662 937-1711

Key Contact(s):  
Mr. Ian Pye, President  
Chiranun Poopat, VP/Buying, Merchandising  
and Marketing



**Cen Car Ltd (Carrefour Global Sourcing)**

14th Floor Q. House Sathorn Building  
11 South Sathorn Road, Tungmahamek,  
Sathorn, Bangkok 10120  
Tel. +662 625-4444  
Fax. +662 677-3343-4

Key Contact(s):  
Jean Paul Khaou, Head of Fresh Division  
Stephane Naurier, Head of Grocery Division

**The Mall Group (The Mall)**

1909 Ramkhamhaeng Road  
Huamark, Bangkapi  
Bangkok 10240, Thailand  
Tel. +662 310-1000 / 318-8925  
Fax. +662 315-6605 / 318-8923

Key Contact(s):  
Mr Pira Asawapirom, Chief Merchandising  
Officer

**Siam Jusco**

129 Ratchdapisek Rd  
Dindaeng, Bangkok 10320, Thailand  
Tel. +662 642-2401-8  
Fax. +662 970-1823-4

Key Contact(s):  
Mr Takashi Takani, Managing Director

**The City Mall Group Limited (Emporium)**

622 Sukhumvit 24 Rd  
Klongton, Klongtoey  
Bangkok 10110, Thailand  
Tel. +662 664-8000  
Fax. +662 663-4532, 663-4536

Key Contact(s):  
Mr. Kriengsak Tantipipop, Managing Director

**Foodland Supermarket Co., Ltd**

2675 Lard Prao 95  
Wangthonglarng, Bangkok 10310, Thailand  
Tel. +662 932-2948  
Fax. +662 539-0837

Key Contact(s):  
Mr Supamit Surongsain, Assistant Vice  
President of Marketing

**Tang Hua Seng Department Store**

289 Sirinthorn Rd  
Bangbamru, Bangplad  
Bangkok 10700, Thailand  
Tel. +662 434-0448  
Fax. +662 434-6057

Key Contact(s):  
Mr Viroj Chunprathiphong, Managing  
Director

**Villa Market JP Co., Ltd**

591/1, 4-5 Sukhumvit Rd  
Klongton, Klongtoey  
Bangkok10110, Thailand  
Tel. +662 662-1000  
Fax. +662 259-1077

Key Contact(s):  
Mr Surapong Poosanakhom, Managing  
Director  
Mr. Pisit Poosanakhom, Executive Director

**CP 7-Eleven Co., Ltd**

313 CP Tower, 20th Fl.  
Silom Rd, Bangkok 10500, Thailand  
Tel. +662 631-0231 extension 1677  
Fax. +662 638-2680

Key Contact(s):  
Mr. Korsak Chairasmisak, CEO  
Mr Piyawat Thitasathavorakul, Managing  
Director

**Siam Familymart**

139 Robinson Building  
5th Fl Ratchdapisek Rd  
Dindaeng, Bangkok 10320, Thailand  
Tel. +662 254-1632-51  
Fax. +662 255-8573

Key Contact(s):  
Mr. Yoshitsugu Katahira, Managing Director

## APPENDIX I. STATISTICS

<b>Population</b>					
(Millions; % change year on year in brackets)					
	1999	2000	2001	2002	2003
<b>Total (m)</b>	<b>61.78</b>	<b>62.41</b>	<b>62.94</b>	<b>63.46</b>	<b>64.01</b>
Growth Rate	(0.98)	(1.01)	(0.10)	(0.80)	(0.90)
<b>Urban (m)</b>	<b>18.66</b>	<b>18.91</b>	<b>19.22</b>	<b>19.52</b>	<b>19.81</b>
Growth Rate	1.30	1.34	1.61	1.55	1.50
% of total population	30.97	31.14	31.41	31.68	31.95
<b>Population by age:</b>					
Under 15 years	16.08	15.95	15.88	15.78	15.69
% of total population	26.50	26.10	25.70	24.90	24.51
Over 15 years	45.70	46.45	47.06	47.67	48.32
<b>Population by city: (2000 estimates)</b>					
Bangkok		5.68			
Nakhon Ratchasima		2.54			
Ubon Ratchthani		1.77			
Chiang Mai		1.59			
Nakorn Srithammarat		1.52			
Udon Thani		1.52			
12 other Thai provinces have population excess of 1m					
Source: World Bank, Bank of Thailand & Economist Intelligence Unit					

<b>Workforce</b>					
(Millions unless otherwise indicated)					
	1999	2000	2001	2002	2003
<b>Employed</b>	<b>30.66</b>	<b>31.29</b>	<b>32.11</b>	<b>33.06</b>	<b>33.84</b>
Agriculture	13.88	13.89	13.61	14.04	13.88
Non-agriculture	16.79	17.40	18.49	19.02	19.96
Unemployed	1.22	1.06	1.19	0.82	0.75
Seasonal inactive labor force	0.84	0.87	0.52	0.38	0.37
<b>Total workforce</b>	<b>32.72</b>	<b>33.22</b>	<b>33.82</b>	<b>34.26</b>	<b>34.90</b>
Unemployment rate	4.20	3.60	3.30	2.40	2.20
Source: Bank of Thailand & Economist Intelligence Unit					

<b>Exchange Rates</b>					
(Baht per unit of US Dollar annual average)					
	1999	2000	2001	2002	2003
<b>US\$</b>	<b>37.81</b>	<b>40.11</b>	<b>44.43</b>	<b>42.96</b>	<b>41.49</b>
Source: International Monetary Fund					

<b>Consumer Expenditure on Food</b>					
(Millions; US\$ per year )					
	1999	2000	2001	2002	2003
<b>US\$</b>	<b>16,801</b>	<b>17,088</b>	<b>16,475</b>	<b>18,278</b>	<b>N/A</b>
Source: Euromonitor					

<b>Gross Domestic Product</b>					
(Millions; US\$ unless otherwise indicated)					
	1999	2000	2001	2002	2003
<b>Current (US\$ m)</b>	<b>122,337</b>	<b>122,738</b>	<b>115,543</b>	<b>126,905</b>	<b>143,163</b>
Growth (annual %)	4.45	4.76	2.14	5.41	6.74
<b>Per Capita (constant 1995)</b>	<b>2,721</b>	<b>2,828</b>	<b>2,866</b>	<b>3,000</b>	<b>3,182</b>
Growth (annual %)	3.66	3.93	1.37	4.67	6.05
Source: World Bank					

<b>Prices &amp; Earnings</b>					
(% change year on year)					
	1999	2000	2001	2002	2003
<b>Consumer prices</b>					
All items	0.30	1.60	1.60	0.60	1.80
Food	(0.80)	(1.20)	0.70	0.30	3.70
Non-food	1.00	3.20	2.20	0.80	0.70
<b>Producer prices</b>					
Finished goods	(3.00)	2.60	2.40	2.30	2.50
Intermediate materials	(5.10)	7.90	1.40	(0.20)	6.40
Crude materials	(15.5)	0.70	7.50	3.70	7.40
Source: Bank of Thailand & Economist Intelligence Unit					

<b>Consumer Oriented Agricultural Total - 400</b>			
<b>Reporting: Thailand - Top 15 Ranking</b>			
(Import Value 1000\$)			
	1999	2000	2001
New Zealand	101408	108304	131629
Australia	109745	102837	109930
United States	77729	87079	94910
China (Peoples Republic of)	41153	45954	54374
Netherlands	37051	42605	47558
Ireland	29991	37917	43120
Malaysia	8822	18087	26264
France	18577	21852	26052
Japan	20737	21657	21406
Czech Republic	9571	12955	21324
United Kingdom	15537	18367	18277
Indonesia	11518	15465	17863
Germany	16435	21061	16033
Singapore	8164	12042	14758
Denmark	11650	13481	14233
Other	70231	72595	93176
World	588337	652267	750935
Source: United Nations Statistics Division			

<b>Fish &amp; Seafood Products - 700</b>			
<b>Reporting: Thailand - Top 15 Ranking</b>			
(Import Value 1000\$)			
	1999	2000	2001
Taiwan (Estimated)	83300	73284	136727
Indonesia	121587	108281	125176
Micronesia, Federated States of	26427	34422	57137
Japan	61431	45014	56552
India	35474	42191	45493
Australia	6388	6356	40202
Marshal Islands	27095	16683	37015
Papua New Guinea	32218	25536	34379
Russian Federation	10820	19150	26082
Vietnam	13473	25914	25045
Greenland	8704	18220	25039
China (Peoples Republic of)	9358	12963	23655
Norway	14901	22420	23153
United States	14909	21539	21050
Korea, Republic of	26569	11264	20339
Other	282694	230643	256188
World	775362	713894	953232
Source: United Nations Statistics Division			

<b>Thailand Imports</b>									
(In Millions of Dollars)									
	Imports from the World			Imports from the U.S.			U.S Market Share %		
	1999	2000	2001	1999	2000	2001	1999	2000	2001
<b>BULK AGRICULTURAL TOTAL</b>	<b>851</b>	<b>1011</b>	<b>1006</b>	<b>308</b>	<b>339</b>	<b>304</b>	<b>36</b>	<b>34</b>	<b>30</b>
Wheat	120	105	135	57	46	56	48	43	42
Coarse Grains	18	39	5	2	2	2	13	5	38
Rice	1	1	1	1	1	1	99	77	10
Soybeans	210	285	279	140	168	119	67	59	43
Other Oilseeds	7	7	5	1	1	1	2	2	3
Cotton	394	469	486	36	77	102	9	16	21
Tobacco	73	57	42	71	47	24	98	82	57
Rubber & Allied Gums	2	2	3	1	1	1	3	3	3
Raw Coffee	1	1	1	1	1	1	18	10	16
Cocoa Beans	16	16	16	0	0	0	0	0	0
Tea (Incl. Herb Tea)	1	1	1	1	1	1	2	1	1
Raw Beet & Cane Sugar	0	1	1	0	0	0	0	0	0
Pulses	2	2	3	1	1	1	8	6	7
Peanuts	1	9	14	1	1	1	4	0	0
Other Bulk Commodities	5	17	16	1	1	1	0	0	0
<b>INTERMEDIATE AGRICULTURAL TOTAL</b>	<b>822</b>	<b>921</b>	<b>1076</b>	<b>148</b>	<b>152</b>	<b>201</b>	<b>18</b>	<b>16</b>	<b>19</b>
Wheat Flour	10	10	12	1	1	1	0	0	0
Soybean Meal	237	266	338	47	33	60	20	13	18
Soybean Oil	1	1	1	1	0	0	9	0	0
Vegetable Oils (Excl. Soybean Oil)	41	37	40	1	1	1	2	3	2
Feeds & Fodders (Excl. Pet Foods)	92	102	100	39	46	40	42	45	40
Live Animals	37	18	21	5	1	0	14	4	0
Hides & Skins	122	145	192	25	34	57	20	24	30
Animal Fats	3	2	2	1	1	1	2	3	1
Planting Seeds	9	20	11	1	2	1	12	8	6
Sugars, Sweeteners, & Beverage Bases	5	5	9	1	1	1	16	13	11
Essential Oils	33	51	49	4	4	5	12	8	10
Other Intermediate Products	232	266	300	25	30	37	11	11	12
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	<b>588</b>	<b>652</b>	<b>751</b>	<b>78</b>	<b>87</b>	<b>95</b>	<b>13</b>	<b>13</b>	<b>13</b>
Snack Foods (Excl. Nuts)	26	30	36	2	2	2	6	7	7
Breakfast Cereals & Pancake Mix	8	8	6	2	2	1	27	20	25
Red Meats, Fresh/Chilled/Frozen	4	4	4	1	1	1	30	18	14
Red Meats, Prepared/Preserved	1	1	1	1	1	1	11	10	27
Poultry Meat	2	1	1	1	1	1	3	18	8
Dairy Products (Excl. Cheese)	250	251	294	12	11	15	5	5	5
Cheese	4	5	7	1	1	1	3	8	10
Eggs & Products	4	6	6	1	1	1	4	4	4
Fresh Fruit	48	52	55	18	19	21	38	36	38
Fresh Vegetables	13	13	12	1	2	1	6	14	1
Processed Fruit & Vegetables	28	37	45	13	17	14	47	47	32
Fruit & Vegetable Juices	7	9	11	2	2	3	31	21	29
Tree Nuts	5	6	6	1	2	2	28	28	35
Wine & Beer	10	10	9	1	1	1	8	8	7
Nursery Products & Cut Flowers	3	2	2	1	1	1	1	1	0
Pet Foods (Dog & Cat Food)	9	9	10	3	4	4	30	43	40
Other Consumer-Oriented Products	166	210	247	20	25	29	12	12	12
<b>FOREST PRODUCTS (EXCL. PULP &amp; PAPER)</b>	<b>329</b>	<b>403</b>	<b>389</b>	<b>25</b>	<b>36</b>	<b>30</b>	<b>7</b>	<b>9</b>	<b>8</b>
Logs & Chips	97	127	100	1	1	1	0	0	1
Hardwood Lumber	184	214	224	22	32	26	12	15	11
Softwood and Treated Lumber	15	19	18	1	1	1	3	3	1
Panel Products (Incl. Plywood)	22	30	29	1	3	2	6	9	8
Other Value-Added Wood Products	11	13	18	1	1	1	5	7	7
<b>FISH &amp; SEAFOOD PRODUCTS</b>	<b>775</b>	<b>714</b>	<b>953</b>	<b>15</b>	<b>22</b>	<b>21</b>	<b>2</b>	<b>3</b>	<b>2</b>
Salmon	14	28	36	2	7	8	17	27	23
Surimi	1	3	3	1	1	1	28	31	16
Crustaceans	138	182	207	6	5	4	4	3	2
Groundfish & Flatfish	148	146	178	1	4	2	0	3	1
Molluscs	76	69	70	1	1	1	0	0	1
Other Fishery Products	399	286	459	5	3	6	1	1	1
<b>AGRICULTURAL PRODUCTS TOTAL</b>	<b>2261</b>	<b>2584</b>	<b>2833</b>	<b>533</b>	<b>578</b>	<b>600</b>	<b>24</b>	<b>22</b>	<b>21</b>
<b>AGRICULTURAL, FISH &amp; FORESTRY TOTAL</b>	<b>3365</b>	<b>3701</b>	<b>4175</b>	<b>573</b>	<b>636</b>	<b>651</b>	<b>17</b>	<b>17</b>	<b>16</b>

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

End of Report