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Thailand

Exporter Guide

Annual

2002

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Report Highlights:
This Exporter Guide is prepared by the USDA, Bangkok office for U.S. exporters of high-value and consumer-oriented foods who are interested in entering the Thai market. It provides information on local business practices; tips for U.S. exporters to do business in Thailand; current market situation and future trends for retail, HRI food service and food processing sector; best high-value product prospects, tariff rate table and interesting key contacts in Thailand.

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

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THAILAND

Full Name : Kingdom of Thailand Head of State: His Majesty King Bhumibol Adulyadej (since 1946) Head of Government: Prime Minister Thaksin Shinawatra (since 2001) Government : Democratic Constitutional Monarchy Land Area : 514,000 sq.km.	Religion : 95% Buddhist, 4% Muslim, 1% other (includes Christian, Hindu) Language : Thai (spoken by 85% of population), English and Chinese People : 75% Thai, 12% Chinese, 3% Malay, 10% Other National Capital: Bangkok Currency : Thai Baht (THB)

SECTION I: Market Overview

Economic Trends and Outlook

Economic growth moderated in 2001, primarily as a result of the impact of the global slowdown on the industry sector and on exports. Thailand was the United States' 22nd largest export market in 2001. U.S. goods exports to Thailand were approximately $6.0 billion, a decrease of $622 million (9.4 percent) from 2000. U.S. imports from Thailand were $14.7 billion in 2001, a decrease of $1.7 billion (10.1 percent) from 2000. The annual value of U.S. agricultural exports to Thailand declined from nearly $630 million before the financial crisis to $535 million in 2001, for reasons including reduced domestic demand and currency devaluation, as well as hikes in excise taxes and tariffs. It is estimated, by industry, that potential U.S. agricultural exports to Thailand could reach $900 million a year if Thailand's tariffs and other trade-distorting measures were substantially reduced or eliminated and the economy recovered to precrisis levels.

The outlook for Thai economic and general business climate are expected to improve continuously in 2002, with GDP growth estimate to be in the 3.5-4.0 percent range. Consumer spending also recover as well. In July 2002, the Manufacturing Production Index (MPI) grew strongly, especially in export-oriented industries. Farm income continued to rise, benefitting from both improved output and favorable farm prices. Meanwhile, domestic demand expanded well on the whole. The growth of private investment was high, owing mainly to the acceleration in equipment investment. Private consumption also picked up from June in line with the steady improvement in consumer and business confidence. The continued expansion in domestic demand contributed to the significant rise in imports. At the same time, exports expanded favorably for the fourth consecutive month, with export quantity rising strongly while prices continued to fall from the same period last year.

Both exports and imports continued to expand in July 2002. Exports increased by 7.7 percent year-on-year, driven mainly by strong external demand for electronic products (except computers) as well as higher prices of rice and rubber. At the same time, imports rose by 11.1 percent year-on-year in line with the expansion in domestic demand. This is considered a positive sign for continuing economic expansion. However, as a result of the significant rise in imports, the trade balance registered a deficit of 185 million US dollars in July. The service and transfers account remained in surplus, owing mainly to net tourism receipt. The property sector appears to be turning around. In Bangkok the number of applications for ownership during 2001 increased by 8.3 percent for condominium units and by 4.3 percent for housing units.

The baht (reference rate) averaged at 41.20 baht per US dollar in July 2002, appreciating from the average of 42.15 baht per US dollar in June. The average exchange rate in July was also the strongest over the past 21 months. The main factor supporting the appreciation of the baht was the weakened US dollar, which came as a result of rising uncertainties over the strength of the present US recovery coupled with the downturn of US stock prices plagued by accounting scandals.

For the second half of 2002 and year 2003, growth prospects will be influenced significantly by the evolution of global economic trends. The economy is relatively open, with aggregate trade (defined as the ratio of exports plus imports to nominal GDP) of 111% of GDP. Economic momentum is expected to strengthen in late 2002 with the expected acceleration in recovery of global demand. Over the medium term, the prospects for growth will remain crucially dependent on continued progress in finance sector reform and corporate debt restructuring.

Inflation is projected to be around 0.5-1 % in 2002 and 0.5-1.5% in 2003. The current account surplus is projected to narrow further to 4.1% of GDP in 2002 and then to about 3% in 2003. As economic growth begins to accelerate, imports growth is expected to slightly outpace that of exports.

Thailand's Key Economic Indicators

	Unit	1999	2000	2001	2002 (Jan.-May)	2002E
- Population	Mil.	61.7	62.3	62.3	-	63.0
- Economic Growth Rate	%	4.4	4.6	1.8	3.9 [1/]	2.0-3.0
Agriculture	%	2.0	4.9p	1.5p	5.1 [1/]	1.6
Manufacture	%	12.3	6.0p	1.2p	4.1 [1/]	1.8
- Gross Domestic Product (GDP)	Bill. Baht	4,615.4	4,904.7	5,100p	1,345.2 [1/]	5,309.2
- GDP Growth	%	4.4	4.6	1.8	-	3.0-4.0
- GNP Per Capita	Baht/Person	75,143	78,702p	80,963p	-	84,272
- Inflation Rate (CPI)	%	0.3	1.6	1.6	0.4 [2/]	0.5-1.0
- Foreign Trade						
Export (f.o.b.)	Bill. US$	58.5	69.9	65.4	26.3	69.0 [3/]
Merchandise Export Growth	%	7.4	19.6	-7.0	-	4.0
Import (C.I.F.)	Bill. Baht	1,907.4	2,494.2	2,756.7	1,097.6	-
Merchandise Import Growth	%	16.9	31.3	-2.8	-	5.0
- Trade Balance	Bill. US$	8.5	7.7	3.6	1.2	
- Balance on Current Account	Bill. US$	12.5	9.2p	5.6p	1.7p [4/]	
- Balance of Payments	Bill. US$	4.6	-1.6p	1.8p	1.2p [4/]	
- Average Exchange Rate	Baht/US$	37.84	40.16	44.48	43.49	

Source: Office of the National Economic and Social Development Board, Bank of Thailand, BOI
: Department of Internal Trade / Ministry of commerce
Remark: p = Preliminary, E = Estimate
1/ Quarter 1/2002
2/ Cumulative figures January - June
3/ The estimated figure from Department of Export Promotion

4/ Cumulative figures January - April

Market Opportunities

< 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 Lao PDR in the north and northeast; the Union of Myanmar 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. There are approximately 62.31 million population by the end of 2001. Theravada Buddhism is the national religion and is actively practiced by about 95% of Thais with the remainder made up of Islam, Christianity, Hinduism and other faiths. About 50.46 million Thais are aged 13 years and over, 30.91 million are male.

< The size of the work force now exceeds 32.9 million, with the majority of the workforce under 30 years of age. About 800,000 people join this force each year, with a literacy rate above 90 percent. Many standard labor practices apply, including mandatory severance packages, and overtime payments for work in excess of normal workday.

< The minimum wage in Thailand is currently 165 baht per day (US$3.71) in Bangkok, and between 130-140 baht in other provinces.

Minimum Daily Wage

Provinces	Baht/Day	US$/Day
Phuket	168	3.78
Bangkok, Samut Prakarn, Nonthaburi, Pathum Thani, Nakhon Pathom, Samut Sakhon	165	3.71
Chonburi	146	3.29
Chiang Mai, Nakron Ratchasima, Phang Nga, Ranong and Saraburi	143	3.22
Ang Thong	138	3.11
Chachoengsao	137	3.08
Singbusi and Narathiwat	135	3.04
The rest of the country	133	2.99

Source: Bank of Thailand
Remark: 1US$ = 44.41 baht

< Thailand continue to increase emphasis on education as the Eighth National Economic and Social Development Plan (1997-2002) focuses on the development of the Kingdom's human resources as its highest priority.

< More literated people due to increased overseas studies, international travel, access to internet and cable TV

< Over 10 percent of total population live in Bangkok which accounts for 90 percent of the sales

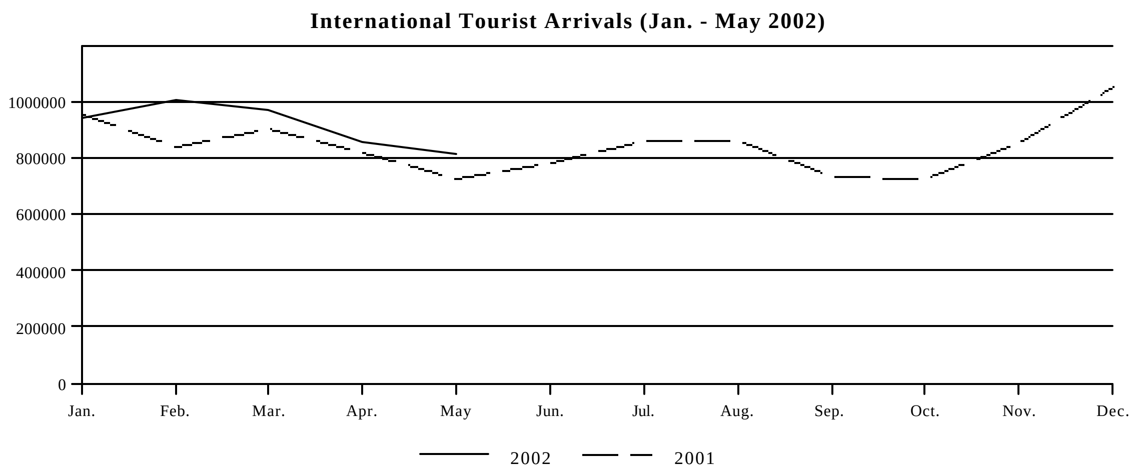
of fast moving consumer goods.

- Most of medium and high income people live on the major cities, including Bangkok, Chantaburi, Chiang Mai, Chiang Rai, Chonburi, Hat Yai, Khon Kaen, Nakorn Sithammarat, Pattaya, Petchaburi, Pitsanulok, Phuket, Ratchaburi, Samui Island, Surat Thani, Ubon Ratchatahni and Udon Thani.
- A stable and stronger Baht in 2001 and beginning of 2002 led to increase in imported consumer-oriented food products from the United States.
- Over the past few years, Thais living in urban areas are relatively brand conscious and their shopping styles move away from the traditional open-air wet markets to modern supermarkets and shopping centers which offer them convenience and a wide selection of products.
- 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 labors in the work force (76.50% in Qr1/2002), the introduction of ready-to-eat and prepared food items is expected to trigger convenience food market in Thailand. Moreover, younger population is very receptive to new food varieties.
- Growth in Thai Tourism Industry

International Tourist Arrivals (January-May 2002)

Month	2002	2001	% Change	Average Growth
Jan.	940,653	958,256	-1.84	-1.84
Feb.	1,008,422	841,709	+19.81	+8.28
Mar.	967,194	904,041	+6.99	+7.85
Apr.	855,353	822,840	+3.95	+6.94
May	811,955	725,028	+11.99	+7.80
Jun.	-	787,330	-	-
Jul.	-	863,071	-	-
Aug.	-	861,283	-	-
Sep.	-	733,160	-	-
Oct.	-	724,823	-	-
Nov.	-	857,440	-	-
Dec.	-	1,053,528	-	-
Total	**4,583,577**	**10,132,509**	-	-

Source: Tourism Authority of Thailand



< In 2001, the growth rate of international tourists visiting Thailand increased 5.8%, which equals to10.06 million tourists.

Number of International Tourists Arrivals

Region	Tourist Arrivals ('000 persons)				% Change			
	2543	2544			2543	2544		
		Jan-Aug	Sep-Dec	Whole Year		Jan-Aug	Sep-Dec	Whole Year
East Asia	5,545.9	3,860.3	1,926.1	5,786.4	10.9	5.9	1.3	4.3
- Asean	2,056.4	1,374.2	867.3	2,241.5	10.3	0.1	18.1	5.0
- Japan	1,202.2	839.0	338.6	1,177.6	13.4	7.7	-20.0	-2.0
- China	753.8	552.4	249.0	801.4	-7.4	1.5	18.9	6.3
- Taiwan	706.5	529.3	209.4	738.7	33.7	17.9	-18.8	4.7
Europe	2,301.8	1,654.5	854.0	2,508.5	8.7	10.5	6.1	9.0
America	663.3	473.3	209.7	683.0	11.4	10.6	-10.9	3.0
South Asia	352.0	244.0	106.8	350.8	20.6	7.1	-14.0	-0.3
Oceania	378.9	271.3	149.2	420.5	9.8	15.3	4.0	11.0
Middle East	182.4	149.0	66.1	215.1	17.9	22.9	8.1	18.0
Africa	84.5	62.6	34.8	97.4	11.2	18.1	10.6	15.3
Total	**9,508.6**	**6,715.0**	**3,346.9**	**10,061.9**	**10.8**	**8.2**	**1.4**	**5.8**

Source: Tourism Authority of Thailand

- Thailand is a major convention and Incentive destination for Asian Region. The Mice (meeting, incentive, convention and exhibition) business contributed approximately 290 billion baht (7 billion USD) last year. In 2002, the number of convention visitors increased by 15.13%
- Due to the launch of various aggressive marketing campaigns by the Tourism Authority of Thailand aimed to promote tourism industry of Thailand and turn the country into tourism hub of Asia, it is projected that for the whole year of 2003 foreign tourist arrivals will grow by 6 percent this year to 11.13 million, with tourism revenue being estimated at 360.6 billion Baht (9 billion USD).
- High growth in number of hotels, resorts and other tourist accommodations leads to increase in number of imported food items to support more coming tourists

Number Accommodation Establishments and Rooms in Major Cities 2000

REGION	ESTABLISHMENTS	ROOMS
Bangkok	**621**	**80,683**
Central/West (Excluding Bangkok)	**830**	**34,083**
Kanchanaburi	224	7,485
Cha-Am	83	4,951
Hua-Hin	114	4,451
Others	409	17,196
Eastern	**904**	**57,290**
Pattaya	278	25,807
Rayong	204	8,931
Trat	152	3,825
Others	270	18,717
Northern	**970**	**46,567**
Chiang Mai	328	21,236
Chiang Rai	137	5,699
Phitsanulok	46	3,164
Others	459	16,468
Southern	**1,676**	**74,819**
Phuket	366	22,643
Samui	327	10,474

Hat Yai	106	9,869
Sungai Kolok	39	1,810
Others	838	30,023
Northeastern	**524**	**25,370**
Nakhon Ratchasima	104	6,157
Khon Khen	39	3,407
Ubon Ratchathani	45	2,501
Others	336	13,305
Total	**5,525**	**318,812**

< Upper and middle-income groups in Thailand like to spend on food especially during the holidays and on daily consumption. 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, cracker, nuts, fruit juice, wine, beer, whisky, health food and fresh fruit.

< Continuously increase in number of health-conscious consumers leads to higher demand of organic and functional food and drinks.

< Thai consumer 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 consumer as the best in the world. However, this perspective does not apply to all U.S. products as some local consumers still prefer wine from France as example.

< Eventhough Thai consumers view U.S. products as high quality, they are very price conscious and susceptible to economic swings. There is high possibility that the low and middle income group will shift to buy cheaper products with acceptable quality during economic recession.

Advantages and challenges facing US products in Thailand

Advantages	**Challenges**
- Varieties of U.S. high quality agricultural products from fresh to processed food.	- Severe competition from Australia, New Zealand and China.
	- U.S. products are not always price-competitive comparing import from other Asean countries due to high tariffs, shipping cost and long distance to Thailand
- Local Thai consumers view US-origin 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 behavior and can lower production cost

- Increase in Thai consumers’ preference for higher quality products	- U.S. products have to compete with other countries’ lower priced agricultural products
- Proliferation of retail industry. New retail outlets are expanding which allow consumers in any part of Thailand to get access to new imported products.	- Lack of importer and retailer knowledge and training in purchasing and handling of U.S. food products
	- Strong local brands which are either foreign or Thai origins in many food and beverage products e.g. Nestle, Singha Beer, etc.
- Eating style of Thai people change toward more imported food items	- Lack of continuous promotion of U.S. varieties in Thai market. Exporters need to support market promotion campaigns to attract new markets
- Increase in niche market with high income and high premium product preference.	- Market penetration for imported products is concentrated in Bangkok and major tourists-promotion provinces only.
- The blooming tourism industry is soaring demand for HRI products, especially U.S. beef, lobster and crab which are widely used in American, French, Japanese and other international style restaurants	- American style mass food products produced locally cost less
- Reliable supply of U.S. agricultural products and advanced U.S. food processing technology	- Thai government’s policy and actions to try to increase demands for Thai local products.
- Government’s policy to support the development of value-added production, this will boost the demand of food ingredients, especially new ingredients	- Some food ingredients can be produced locally
- Good relationship with foreign suppliers	- High import tariffs on high value consumer food and beverage products, especially U.S. meat products, wine, whiskies, cherries, peaches, grapes, apples, pears.
- Thais like to celebrate and gift giving is preferred. Shoppers like to seek and purchase new products for gifts	- Lack of trader and consumer awareness of U.S. products and marketing costs to increase consumer awareness are high.
- Thailand’s beneficial geographic is viewed as a gateway to larger Indochina and other Asian markets	-Due to high import tariffs for U.S. imported products. Most Thai importers shift to import products from other Asian countries e.g. Australia, China, Malaysia, etc.

SECTION II: EXPORTER BUSINESS TIPS

The following are tips for exporters to deal with Thai people. We find these tips are very helpful from web site: http://www.biz-in-thailand.com/thai_tips.html and want to share all these to all U.S. exporters. We hope these suggestions will be useful for all U.S. exporters who want to export agricultural products to Thailand.

Knowing People

< 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 introductions will always facilitate a firm's credibility and acceptance.

< Although many Thais have been educated in the U.S., Britain, Canada or Australia and speak English well, speaking and understanding a conversation on a telephone is often the most difficult part of mastering a foreign language. Because English telephone conversation may be difficult to understand for the Thai, it is best to write. This also gives the Thai company more time to think about a response and may be a better means of communication considering time differences between Thailand and other countries.

< If there is any question about the comprehension of English by the people you are meeting, always use your own translator or interpreter. Do not rely on the other organizations translator or interpreter. They work for the other side and are more likely to protect their business interest and to focus on their interests not yours. Also, meet with your interpreter prior to the meeting and make sure they understand you and your company.

< Most Thais greet someone by bowing slightly forward them while bringing their hands to a praying position in front of them 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." Do not wai secretaries and clerks.

< Thais enjoy combining business and pleasure. Business lunches and dinners are very common. As a general rule, whoever extends the invitation pays for the meal and the entertainment. If it is unclear who has extended the invitation, then the oldest member of the group usually accepts the "honor" of paying.

< As a result of the leisurely way of life in Thailand, spontaneity and often informality is acceptable and appreciated. Sometimes it is all right to schedule impromptu meetings. However, this is not advisable on your first visit to Thailand.

< Foreign business would be wise 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. 5/12/99 means December 5, 1999. To avoid confusion, you may want to use the full date in correspondence.

< Bring a large supply of business cards and advertising materials. You may meet many more people than expect. Asians view the exchange of business cards in particularly as a very necessary opening ritual.

< If a Thai person gives you a compliment, be polite and deny it. Modesty is considered a blessing in Asia even more so than in other regions.

< Be respectful of local culture but don't expect that you have to know everything. Most Thais will make allowances for foreigners.

< Try to learn a few words of the local language. This shows to all your interest in the country and its culture and is considered another demonstration of your cultural sensitivity and good breeding.

Business Meetings

< Avoid business visits during the New Year Festivals (both the Chinese and Thai ones).

< Foreigners are expected to be punctual, but do not expect Thais to be on time.

< 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.

< First meetings should be held in offices, restaurants, or hotel lobbies. Men may be invited to "member clubs" Thais are often impressed if you stay at an expensive hotel; luxury suggests that you represent a very successful company.

< 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, as Thais are impressed by titles.

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

< Avoid topics relating to politics, the royal family, and religion. Be generous in your praise of the

country and the Thai people and refrain from boasting about your country and yourself.

< Gifts are not required for early meetings. If you wish, you can present sample products from your company.

< Never touch or point with your feet. It is consider rude to cross your legs and point your feet to someone. Thais place a great importance on appearance and politeness. Be conscious of this and respond accordingly.

How to export your products successfully?

< It is essential to visit the market for conducting market research, especially for product testing, price comparison, and 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 your product's awareness.

< In Thailand, most large manufacturers/retailers import raw materials/products directly while medium, small manufacturers, retailers, as well as hotels prefer to purchase products from local importers.

< 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 because Australis and New Zealand are just a phone call away in the same timezone.

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

< 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 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. 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 finalized.

< Study the current USDA FAIRS (Food and Agriculture Import Regulations and Standards) 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 available on Internet website: http://www.fas.usda.gov/scriptsw/attacherep/default.asp (select "FAIRS product specific"and "Thailand" under Commodities and Country category respectively)

< Contact, after reviewing the foregoing, the Foreign Agricultural Service in the U.S. Embassy, Bangkok (agbangkok@fas.usda.gov)with any remaining questions on issues such as standard, tariffs, regulations, labeling, etc.

< Food Shows in Thailand :

Name:	*The International Food & Hospitality Show (IFHS)* 2002 incorporating: Wine & Spirits Thailand, Bakery Thailand, Cleantex Thailand
Date:	September 2003
Venue:	Queen Sirikit National Convention Centre, Bangkok
Visitor Profile:	Hotel, supermarket, department store, grocery store & retailers food & drink manufacturers & processors, importers, distributors, wholesalers, restaurants, bar & clubs, industrial & contractors, caterers, canning & bottling centers, trade associations, fast food outlets, bakeries, wine importers, retailers, food & beverage managers, restaurants, airline, government bodies etc.
No. of visitors:	12,319 visitors (2001)
Contact Details:	Bangkok Exhibition Services Ltd. 62 Rama VI Soi 30, Rama VI Road, Samsennai, Phyathai, Bangkok 10400 Tel. ++66 2 6171475 Fax. ++66 2 2713223, 6171406-7 Email: ifhs@besmontnet.com

Name:	*The Food Catering & Food Technology Asia (FCA & FTA)* incorporating: bakeries, wine & spirits, food & beverages, coffee & tea, catering equipment, canteen systems, interior design, hospitality, cleaning, laundry, retail & supermarkets.
Date:	October of 2002/2003
Venue:	Bangkok International Trade & Exhibition Centre (BITEC)
Visitor Profile:	Food manufacturers **-** Senior management, purchasing managers, technicians/line managers, research & development managers, quality control managers, training managers, hospitality staff, food caterers, retailers, convenience shops, restaurants, hospitals, industrial kitchens
No. of visitors:	18,322 visitors (2001)
Contact Details:	**BITEC** 8 Bangna-Trade (KM 1), Bangna, Bangkok 10260 Tel. ++66 2 7493939 Fax. ++66 2 7393959 Email: fca-fta@bitec.net

Name:	*Food Ingredient Asia*
Date:	November 2002
Venue:	Queen Sirikit National Convention Centre, Bangkok
Visitor Profile:	Executives from R&D, purchasing production, marketing & sales, quality assurance and control, legislation, distribution/logistics and general management from: Baby foods/infant formulae; bakery products; beverages; confectionery; convenience foods/ready meals; dairy foods; fats & spreads; food retailers; food supplements; fruit/vegetable products; functional and health foods; government/trade associations; ice cream & deserts; ingredient traders/distributors; ingredients; institutes/universities; meat & fish products; organic foods; pet foods/feed meals; research institutes; snack foods & cereals; vegetarian foods, etc.
No. of visitors:	4528 visitors; 2,317 local visitors (51,17%) and 2,211 overseas visitors (48,83%) (Fi Asia , 2001)
Contact Details:	Mr. Somchai Chansate CMP Media (Thailand) Co., Ltd.,41 Lertpanya Building, Suite 801, 8th floor, Soi Lertpanya, Sri Ayuthana Road, Kwaeng Thanon Phyathai, Khet Rajathewee, Bangkok 10400 Thailand Tel: ++66 2 6426911-8, Fax: ++66 2 6426919-20 E-mail: somchai@thai-exhibition.com

Name:	*Thailand International Food Exhibition 2003 (THAIFEX 2003) and Thailand International Muslim Food Exhibition 2003 (THAIMEX 2003)*
Date:	May 28 - June 1, 2003 and tentative same period in 2004
Venue:	Bangkok International Trade & Exhibition Center (BITEC)
Exhibit Profile:	Fruit and vegetable products, meat products, poultry products, seafood products, preserved products, snacks and grocery products, dairy products, confectionery, ready to eat meal, delicatessen, organic and dietetic products, health and baby food, beverages, Halal-food, raw materials, packaging, machinery and equipment.
Visitor Profile:	Importers, wholesalers, distributors, food manufacturers, processors etc.
No. of visitors	Overseas Visitors 2,046 Local trade visitors 7,667 Public day visitors 40,000 - 50,000
Contact Details	Department of Export Promotion, Ministry of Commerce, Thailand

SECTOR III: MARKET SECTOR STRUCTURE AND TRENDS

RETAIL SECTOR

Thailand's retail sector enjoyed 10.2 percent growth in 2001. Modern trade sales account for more than 54 percent of total retail sales, or THB 289 billion (USD 7 billion) of total sales of THB 536 million (USD 13 billion). Multinational retailers have dominated Thailand's modern food retail market with continued aggressive store expansion in 2000-2002, especially in the hypermarket segment. These modern trade companies, especially the larger firms, represent excellent opportunities for US exporters of consumer food items.

Overall Retail Food Sales and Market Share Year 2001

Description	**No. of Branches (2001)**	**Sales (Million Baht)**	**Market Share (%)**	**Projected Branches Open(Close) Year 2002**	**Total Branches Year 2002**	**Change (%)**
Hypermarket/ Discount Stores	97	126,000	24	20	117	20.6
Department Store	236	97,400	18,19	-6	230	-2.5
Supermarket	207	22,785	4.25	40	247	19.3
Convenient Store	3,250	34,175	6.38	400	3,650	12.3
Specialty Store	636	8,545	2	15	650	2.4
Total (Modern Trade)	*4,425*	*288,905*	*54*	*469*	*4,894*	*10.6*
*Traditional Markets**	*297,405*	*246,645*	*46*	*-44,311*	*253,094*	*-14.9*
Total	301,803	535,550	100	43,482	257,988	-14.5

Source: Department of Business Economics, 18 April 2001

* including open trades, personal care stores and license pharmacies

Supermarkets and hypermarkets are the best method of entry for U.S. exporters to enter Thailand's retail food market. Large convenience store chain like CP 7-Eleven are recommended for selected foodstuffs. The main factors U.S. exporters should consider for U.S. food products are pricing, shelf life of the product and customer preference. The traditional 'Mom and Pop' stores and wet markets in Thailand are not an ideal entry level for U.S. exporters considering price sensitivity and preference for a traditional diet by end consumers in this sector. 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 produced food products. The ASEAN Free Trade Area (AFTA) is one of the major factors contributing to shift in manufacturing bases.

Most of the supermarkets, superstores and hypermarkets in Thailand have their own food brands for ready-to-eat food, ready-to-cook prepared foods, home-made bakery items, TV dinners, sausages, water, cooking oil, rice, sauces, cereals, dairy products and fruit juice. 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 centres to ensure product freshness and operation efficiency.

A. Supermarkets, Superstores, Hypermarkets, Supercenters, Cash-and-Carry Outlets

Entry Strategy

The best method for U.S. exporters to sell to supermarkets, discount stores, hypermarkets or cash and carry is to directly contact supermarkets, discount stores, hypermarkets, and cash and carry who import direct, 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).

Entrance and Other Marketing Fees

Name	No. of branches	Entrance Fee/SKU (Baht)	End Gondola Display Fee (Baht)	Activities Supporting Fees(Baht)					
				Brochure Mailing/ Rebate		Anniversary	New Branch	Damaged Products	Distribution
Tesco-Lotus	33	165,000	500,000	80,000	2-3%	1-3%	1-3%	0.5-1%	2-3%
BigC	25	70,000	70,000-100,000	70,000	2%	1-3%	1-3%	0.5-1%	2-3%
Carrefour	20	50,000	85,000	85,000	2-3%	1-3%	1-3%	0.5-1%	2-3%

SHV Makro	20	90,000	70,000-100,000	130,000	1-2%	1-3%	1-3%	0.5-1%	-
Tops	40	75,000/1st SKU 25,000/2nd SKU	100,000	40,000	3.5%				
Food Lion	28	33,000	15,000	-					
Jusco*	10	3,000/SKU/Branch		30,000					
Foodland	8	100,000/SKU	24,000	15,000					
Villa	5	20,000	20,000						
7-11	1,700	300,000-350,000	1-300,000					0-5%	

Source: Thansetthakit Newspaper, 14 July 2002

Remark: * Tasting Fee 3,000 Baht/Branch

Distribution Channels

The distribution channel to supermarkets, superstores 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. Some supermarkets, superstores and hypermarkets operated by multinational operators import food products directly and keep them at their own distribution centres 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, AM/PM and Siam 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 neighbouring Southeast Asian countries. This group of products includes snack foods, chocolates, cookies, candies, gums and breakfast cereal. Distributors import U.S. branded food from neighbouring 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 to Thai distributors to C-stores, gas marts and kiosk distribution centres.

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. While some local producers are under supervision of a Royal Project in which the distribution is managed by assigned distributors.

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 juice, prune juice, orange juice, grape juice, sparking white grape juice), instant coffee, jam, macaroni and cheese dinners, mayonnaise, Mexican sauce, nuts (peanuts, walnuts, hazel nuts, macadamia nuts), peanut butter jelly, pet food, pie filling, micro wave pop-corn, poultry, preserved or dried fruits, pickles, prunes, raisin, 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 snack foods, breakfast cereal and nutritional products. Products that are not currently present in the market in significant quantities but have good sales potential are American seafood including lobster, crab, crawfish and fish, avocado, beverages, biscuits, candy, grapes, cherries, chocolate milk mix, cooking oil, cream cheese, dip sauce, chilli sauce, kiwi fruits, Mexican sauce, other cooking products, peanut butter jelly, pie filling, TV dinners, sour cream, U.S. beef and whipped cream.

Further Information

Further information on this area is available in A Market Brief on Thailand's Retail Food Sector Report 2001 (GAIN Report #TH1129) 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 200,000 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 these sectors attract middle to higher income Thais, Thai corporate businessmen, resident expatriates and tourists. Thailand tourism is an important services sector which last year generated approximately 299 billion baht (7.5 USD billion) revenue and this industry is one of the key factors which provided the engine power for quick economic recovery. International tourist arrivals to Thailand in 2001 reached 10.1 million compared to 9.5 million in 2000 and total income from all tourism-related business in 2001 was about $7.5 billion compared with around $6.8 billion in 2000. Major tourist cities like Phuket received 3,459,572 international tourists, Samui 823,122, Pattaya 3,652,465, Chiangmai 3,361,764 and Bangkok 23,276,347 in 2001.

The total value of food and beverage consumption in Thailand in 2001 was $27.6 billion, a slight decrease from $28 billion in 2000 and total HRI food service sales are approximately $12.6 billion(estimated figure including small restaurants and sidewalk food outlets). Food and beverages sale of hotels and resorts is account to 30% of total revenues. The average rate of imported food versus locally-produced food in the entire HRI sector is 30 percent; the U.S. has approximately 20 percent of the imported product share. U.S. beef, lobster, fish, crab, seasonings, etc are well-known in the hotel/restaurant trade, and with airline catering companies. Thai Airways International uses 30-40 percent imported food in their in-flight catering service.

General restaurants have been replaced by chains of restaurants such as 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 for the next few years. Currently, Thailand possesses over 900 fast food branches nationwide (KFC 300 outlets, McDonalds 95, MK Suki 122, The Pizza 120, Pizza Hut 99, S&P 50, Chester's Grill 78, Burger King 6, Sizzler 19, Narai Pizzaria 22, Chicken Treat 20) with this figure likely to around 1,000 in the future. Hot and cold drinks including coffee and ready-to-eat foods are served in convenience stores. Hospitals, office buildings and large factories are providing cafeterias for their staffs and customers.

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 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, 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, crawfish (fresh and frozen), American spices, seasonings and sauces, baking products, biscuits, breakfast cereal, canned foods (soup, fruit and vegetables),dairy products (cheese, cheese spread, cream cheese, whipped cream, sour cream, cheese dip, 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, sparkling 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.

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 more than 7,000 food processing companies in Thailand, the majority of which are small and medium-sized establishments. Total import volume of all food ingredients was about 2 million metric tons with a value of $1.8 billion in 2001. Fish and seafood, food chemicals, 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 and 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 percent of production sold outside the country. Approximately 67 percent 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.

Thai Food Exporting Value (January-June 2001)

Product	Jan-June 2000 Value (Million baht)	Jan-June 2001 Value (Million baht)	% Change
Frozen shrimps and prawns	25,013.00	26,279.00	5.06
Semi-milled or wholly milled rice, whether not polished or glazed	24,967.00	25,505.00	2.15
Sugar	16,943.00	22,708.00	34.03
Canned shrimps and prawns	14,251.00	17,117.50	20.11
Canned tunas	8,428.00	11,329.00	34.42
Frozen poultry	7,601.00	10,754.00	41.48
Other prepared or preserved meat, meat offal or blood	6,553.00	7,771.00	18.59
Tapioca chip	3,786.00	5,824.00	53.83
Canned pineapples	4,352.00	4,265.00	-2
Frozen cuttle fish	2,935.00	3,435.00	17.04
Frozen fillets	2,238.00	2,810.00	25.56
Tapioca starch	2,568.00	2,639.00	2.76
Frozen squid	1,551.00	1,687.00	8.77
Tunas not in airtight containers	1,048.00	1,385.00	32.16
Shrimps fresh or chilled	731.00	1,002.00	37.07
Crisp bread	852.00	975.00	14.44
Young corn in airtight containers	740.00	950.00	28.38
Pineapples juice not In airtight containers	936.00	898.00	-4.06
Sardines in airtight containers	764.00	691.00	-9.55
Pineapples juice in airtight containers	617.00	649.00	5.19
Others	50,085.00	60,799.00	21.39
Total	176,959.00	209,472.50	18.37

Source: Based Information from the Department of Customs, Analyzed by Information service department, National Food Institute * Calculated Value

Thailand's processed food export increases continuously as government's efforts to improve export competition of local industries; the food processed sector itself efforts to raise quality and sanitation standards; the introduction of new, ready-to-cook products, mainly for the Japanese and EU markets.

Domestic processed food consumption continue to grow according to the increase in number of Thailand's population accompanied with a higher proportion of processed food and beverages consumed as income and lifestyles change. Although domestic ingredients hold the largest share of the market, these items tend to be of 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 these expected expansion in the food processing industry should provide good export opportunities to U.S. exporters of food ingredients in the longer term as this market segment continues to expand.

Entry Strategy

The most effective way for U.S. food ingredients exporters to enter the Thai market is to appoint a reputable and experienced local importer or distributor. Local firms usually 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 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, 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.

DISTRIBUTION SYSTEM

In Thailand, the distribution channel for retailers, hotels, restaurants, institutional contractors and food processors 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 in 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 supplies. This is especially true for large, integrated food processors, which export many of their products and are well oriented to international trade.

SECTOR IV: BEST HIGH-VALUE PRODUCT PROSPECTS

Thailand Imports and US share of Top 50 Food and Fishery Imports

No.	Product	2000			2001			Growth	1 of 3
		Total $('000)	US Imports $('000)	Share (%)	Total $('000)	US Imports $('000)	Share (%)	Rate* (%)	Market Leader
1	Tuna	270,017	2,104	0.52%	427,523	5,535	0.97%	124.89%	
2	Powder milk & cream	192,497	2,071	1.21%	212,564	6,152	2.86%	116.29%	
3	Dog,Cat&Pet Food	90,365	25,281	57.04%	92,171	32,098	50.12%	-16.47%	*
4	Whiskies	79,201	1,082	0.57%	70,181	1,499	0.78%	19.44%	
5	Apple (Fresh)	41,309	14,036	29.24%	44,474	16,591	26.91%	14.21%	*
6	Milkfood for Infants	45,255	160	0.27%	41,785	123	0.19%	-25.01%	
7	Salmon	28,742	7,492	36.49%	37,953	8,419	33.35%	10.04%	*
8	Crabs	26,945	4,808	18.87%	31,558	3,094	9.32%	-31.63%	*
9	Mackerel	14,952	0	0.00%	15,640	3	0.05%	100.00%	
10	Sugar Confectionery	10,059	151	1.39%	13,304	201	1.39%	23.23%	
11	Chocolate & Food Prep.	10,231	1,830	13.16%	11,950	2,212	14.25%	21.55%	*
12	Instant Coffee	3,588	225	1.26%	11,465	360	0.67%	51.47%	
13	Fruit & Vegetable Juice	8,667	1,843	16.62%	11,043	3,194	18.09%	53.33%	*
14	Other Sauces & Prep.	7,636	1,162	16.51%	7,126	1,206	29.46%	80.43%	*
15	Cod	2,937	1,020	34.59%	7,004	829	12.64%	-16.24%	*
16	Cheese & Curd	4,526	364	6.50%	6,997	691	7.22%	69.57%	
17	Frozen Fries	6,424	4,896	76.51%	6,885	4,816	71.49%	3.38%	*
18	Wine	8,282	723	6.60%	6,594	532	5.85%	-21.72%	
19	Grapes	6,174	4,014	62.42%	6,293	3,863	58.36%	13.95%	*
20	Sunflower Oil	3,428	0	0.00%	5,895	2	0.03%	100.00%	
21	Canned Peach	914	212	22.04%	3,924	1,217	30.65%	453.74%	*
22	Breakfast Cereal	5,776	223	4.08%	3,245	155	3.67%	-23.42%	
23	Dried Peas, Beans, Lentils	1,881	109	2.13%	2,929	211	1.13%	-5.39%	
24	Soups&Broths&Prep.	2,942	1,000	53.33%	2,714	748	50.55%	-23.49%	*
25	Beef	2,705	640	18.43%	2,443	578	25.38%	2.67%	*
26	Jams, Fruit Jellies	3,223	889	25.52%	2,188	736	25.14%	-26.43%	*
27	Pears & Quinces	1,590	2	0.12%	1,742	23	0.89%	997.89%	
28	Popcorn	35,927	1,307	1.01%	1,642	1,102	42.48%	-17.24%	*
29	Instant Tea	803	725	85.04%	1,519	1,453	91.88%	324.81%	*
30	Almonds(fresh/dried)	1,407	1,248	89.60%	1,505	1,456	96.12%	16.47%	*
31	Ice Cream	559	449	84.10%	1,185	463	30.01%	-1.94%	*
32	Tomato Ketchup & Other Tomato Sauces	407	245	74.24%	1,148	364	22.87%	49.82%	*
33	Beer	613	33	6.40%	1,098	71	7.20%	86.96%	
34	Mustard Flour & Meal & Prepared Mustard	882	326	46.10%	763	244	55.35%	13.35%	*
35	Coffee Beans	554	406	62.82%	747	449	60.71%	12.57%	*
36	Pistachios	379	288	72.31%	630	457	61.31%	76.73%	*
37	Orange (Mandarin, Tangerins, Satsuma)	631	169	23.70%	584	133	21.87%	-20.19%	*
38	Scallops	347	45	7.38%	542	50	6.36%	-10.42%	
39	Sardines	294	46	8.62%	500	30	5.99%	0.80%	

No.	Product	2000			2001			Growth	1 of 3
		Total	US Imports	Share	Total	US Imports	Share	Rate*	Market
		$('000)	$('000)	(%)	$('000)	$('000)	(%)	(%)	Leader
40	Sparkling Wine	464	0.21	0.00%	480	0	0.00%	-100.00%	
41	Sheep/Lamb	247	1	0.54%	431	0	0.00%	-100.00%	
42	Other Nuts inc. Mixtures	468	142	30.77%	398	157	32.98%	32.97%	*
43	Raisin	260	252	97.86%	282	278	97.80%	22.08%	*
44	Cherries	220	170	85.36%	246	207	84.80%	-12.98%	*
45	Peanuts	391	366	87.07%	235	218	93.32%	-40.01%	*
46	Sausages & Similar Product of Meat	345	2	1.39%	197	4	4.75%	117.13%	
47	Dog Fish & Other Sharks	224	180	83.01%	170	145	82.34%	-21.42%	*
48	Plums & Sloes	159	130	78.52%	148	94	62.43%	-12.62%	*
49	Other Sparkling Wine	116	16	10.92%	132	27	13.71%	35.10%	*
50	Sea Bass	586	327	20.61%	86	0.01	0.02%	-99.97%	
51	Turkey	95	81	92.33%	45	45	100.00%	-15.49%	*
52	Peaches inc. Nectarines	8	0.04	2.01%	29	9	22.21%	2581.14%	*
53	Almond(roasted)	152	18	15.96%	6	5	80.87%	-86.40%	*
54	Grapefruit	2	2	100.00%	0.02	0	0.00%	-100.00%	

* Growth rate calculated from imported volume (kg.)

SECTION V. TARIFF RATE TABLE

No.	PRODUCT	HARMONIZED CODE	QUOTA	TARIFF (WTO) 2002 (%)	2002 Volume	2003 (%)	2003 Volume	2004 (%)	2004 Volume
1	BEEF (Fresh and Frozen)*	0201 0202		52		51		50	
2	BEEF OFFALS*	0206.100.007		36		33		30	
3	MEAT OF SWINE	0203.290.000		36		33		30	
4	MEAT OF SHEEP/LAMB	0204		34		32		30	
5	TURKEY	20724-20727		36		33		30	
6	SALMON,TUNAS,COD,SARDINES MACKEREL AND OTHER FISH	0303		5		5		5	
7	CRABS	0306.140.001		5		5		5	
8	SCALLOPS	0307.210.006 0307.290.003		5		5		5	
9	POWDER MILK & CREAM	0402	X	32		31		30	
10	CHEESE & CURD	0406		36	Bt.12/kg	33	Bt.11/kg	30	Bt.10/kg
11	DRIED PEAS, BEANS,LENTILS	0713		44		42		40	
12	ALMONDS, FRESH/DRIED IN SHELL & SHELLED	'0802110001 0802120002		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
13	PISTACHIOS, FRESH/DRIED	0802.500.008		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
14	ORANGE	0805.200		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
15	GRAPEFRUIT, FRESH/DRIED	0805.400.002		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
16	GRAPES, FRESH	0806.100.002		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg
17	RAISINS	0806.200.004		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg
18	APPLE (FRESH)	0808.100.003		36	Bt.15.00/kg	33	Bt.13.75/kg	30	Bt.12.50/kg
19	PEARS & QUINCES	0808.200.005		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg
20	CHERRIES (FRESH)	0809.200.000		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
21	PEACHES, INCL NECTARINES	0809.300.002		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
22	PLUMS AND SLOES	0809.400.004		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
23	COFFEE	0901	X						
24	POPCORN	1005.90.0000	X						
25	SUNFLOWER/SUFFLOWER OIL (EDIBLE)	1512.191006		27.6	Bt.5.11/l.	27.3	Bt.5.06/l.	27	Bt.5.00/l.
26	SAUSAGES	1601		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg
27	SUGAR CONFECTIONERY	1704.100.007 1704.900.001		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
28	CHOCOLATE & FOOD PREP. WITH COCOA	1806		44	Bt.36.80/kg	42	Bt.35.15/kg	40	Bt.33.50/kg
29	MILKFOOD FOR INFANTS	1901.101.009		9.2		9.1		9	
30	OTHER PREPS W/FLOUR MEAL OR STARCH	1901.909.004		9.2		9.1		9	
31	BREAKFAST CEREAL	1904.10		31.4	Bt.26.19/kg	25.7	Bt.21.43/kg	20	Bt.16.67/kg
32	FROZEN FRIES	2004.100.007		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg
33	JAMS, FRUIT JELLIES	2007		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg
34	PEANUTS	2008.110.004		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg
35	OTHER NUTS INC MIXTURES	2008.190		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg

36	ALMOND (ROSTED)	2008.190.014		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg
37	CANNED PEACH	2008.700.004		36	Bt.30.00/kg	33	Bt.27.50/kg	30	Bt.25.00/kg

No.	PRODUCT	HARMONIZED CODE	QUOTA	TARIFF (WTO)					
				2002		2003		2004	
				(%)	Volume	(%)	Volume	(%)	Volume
38	FRUIT & VEG JUICE	2009		44	Bt.14.72/l.	42	Bt.14.06/l.	40	Bt.13.40/l.
39	INSTANT COFFEE	2101.110.010	X						
		2101.120.010							
40	INSTANT TEA	2101.200.016		44		42		40	
41	TOMATO KETCHUP	2103.200.004		36	Bt 9.00/kg.	33	Bt. 8.25/kg.	30	Bt. 7.50/kg.
42	MUSTARD	2103.300.006		36	Bt 15.00/kg.	33	Bt. 13.75/kg.	30	Bt. 12.50/kg.
43	OTHER SAUCES & PREP	2103.909.099		44	Bt. 11.04/kg.	42	Bt. 10.55/kg.	40	Bt. 10.05/kg.
44	SOUPS & BROTHS & PREPARATION	2104.100.008 2104.200.004		31.4	Bt. 5.36/kg.	25.7	Bt. 4.43/kg.	20	Bt.3.50/kg.
45	ICE CREAM	2105.000.001		44		42		40	
46	OTHER FOOD PREP	2106.900		31.4		25.7		20	
47	BEER	2203.000.001		62	Bt. 25.8/l.	61	Bt. 25.4/l.	60	Bt. 25.00/l.
48	SPARKLING WINES	2204.100.104		55.2	Bt. 18.4/l.	54.6	Bt. 18.2/l.	54	Bt. 18.00/l.
49	OTHER SPARKLING WINES	2204.100.907		55.2	Bt. 18.4/l.	54.6	Bt. 18.2/l.	54	Bt. 18.00/l.
50	WINE	2204210001		55.2	Bt. 18.4/l.	54.6	Bt. 18.2/l.	54	Bt. 18.00/l.
		2204290009							
51	WHISKIES	2208.300.004		62	Bt. 124/l.	61	Bt. 122/l.	60	Bt. 120/l.
52	DOG&CAT FOOD	2309.100.108		9.2		9.1		9	
		2309.100.905							

Remark: *Inspection fee by Livestock Department is equal to Baht5/kg. for beef and Baht20/kg. for offals

SECTION VI. 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

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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

Don Muang Airport, Bangkok 10900

Tel. +662-535-1435

Fax. +662-523-6622

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

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Fax. +662-276-0061

CUSTOM DEPARTMENT, MINISTRY OF FINANCE

Import Formalities

Import Formalities Division

Customs Department

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Tel. +662-249-4102

Fax. +662-249-4102

Legal Affairs

Legal Affairs Bureau

Customs Department

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Fax. +662-671-7626

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CODEX CONTACT

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Director

Office of the National Codex Alimentarius Committee

Thai Industrial Standards Institute

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U.S. DAIRY EXPORT COUNCIL

Southeast Asian Representative Office

Pacrim Associates Limited

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155 Rajadamri Road, Bangkok 10330

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U.S. DRY PEA AND LENTIL COUNCIL

AgriSource Co., Ltd

No. 416, 4th Fl., Ambassador's Court

76/1 Soi Langsuan

Ploenchit Road, Bangkok 10330

Tel. +662-251-8655/6, 251-8669, 251-8772

Fax. +662-251-0390

AMERICAN SOYBEAN ASSOCIATION

Thailand Representative

Level 24 Muang Thai-Phatra Tower 2

252/119 Rachadapisek Road, Huaykwang, Bangkok 10320

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Fax. +662-693-2886

WASHINGTON APPLE COMMISSION

208 Soi Ram-Indra 9

Ram-Indra Road, Anusa-waree, Bangkhen, Bangkok 10220

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Fax. +662-970-8208

RETAILERS IN THAILAND

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Klongchan, Bangkapi

Bangkok 10240, Thailand

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Big C Supercenter Co., Ltd

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Fax. +662 655-5801-2

Contact person: Mr. Yves Braibant, CEO

Ek-chai distribution System Co., Ltd (Lotus Supercenter)

Modernform Tower

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Fax. +662 722-9637

Contact person: Mr Mike Raycraft, CEO

CRC Ahold Co., Ltd (Top Supermarket)

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Bangkok 10900

Tel. +662 937-1700

Fax. +662 937-1711

Contact person: Patcharee Pornananrat, AVP/Buying & Merchandising-Groceries

Cen Car Ltd (Carrefour Merchandise)

14^{th} Floor Q. House Sathorn Building

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Sathorn, Bangkok 10120

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Siam Jusco

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Contact person: Mr Takashi Takani, Managing Director

The City Mall Group Limited (Emporium)

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Klongton, Klongtoey

Bangkok 10110, Thailand

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Fax. +662 663-4532, 663-4536

Contact person: Mr. Kriengsak Tantipipop, Managing Director

Foodland Supermarket Co., Ltd

2675 Lard Prao 95

Wangthonglarng, Bangkok 10310, Thailand

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Fax. +662 539-0837

Contact person: Mr Supamit Surongsain, Asst. Vice President Marketing

Tang Hua Seng Department Store

289 Sirinthorn Rd

Bangbamru, Bangplad

Bangkok 10700, Thailand

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Fax. +662 434-6057

Contact person: Mr Viroj Chunprathipthong, Managing Director

Isetan Department Store

4/1-4/2 World Trade Centre

Rajadamri Rd, Pathumwan

Bangkok 10330, Thailand

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Fax. +662 255-9808, 255-9716

Contact person: Mr Takeshi Ito, Managing Director

Chiang Mai BigC (2001) Co., Ltd.

208 Moo 3, T. Thasala

Ampur Muang, Chiang Mai 50000

Tel. +6653 262-300

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Contact person: Mr. Songsiri Tachaboon, Manager Director

Food Lion Supermarket Co., Ltd

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Nongborn, Praves

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Fax. +662 721-3399

Contact person: Mr. Michel Pree, Director

UFM Fuji Super

593/29-39 Sukhumvit 33/1

North Klongton, Wattana

Bangkok 10110, Thailand

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Fax. +662 258-0697-9

Contact person: Mrs Sudawan Tangtrongsakdi, Managing Director

Villa Market JP Co., Ltd

591/1, 4-5 Sukhumvit Rd

Klongton, Klongtoey

Bangkok10110, Thailand

Tel. +662 662-0372-6

Fax. +662 259-1077

Contact person: Mr Surapong Poosanakhom, Managing Director or

Mr. Pisit Poosanakhom, Executive Director

Central Department Store Ltd. (Marks & Spencer)

22 Chidlom Tower Bldg

12^{th} A Fl., Soi Somkid

Ploenchit Rd, Pathumwan

Bangkok 10330, Thailand

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Contact person: Nidsinee Chirathivat, EVP

CP 7-Eleven Co., Ltd

313 CP Tower, 20^{th} Fl.

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Contact person: Mr Piyawat Thitasathavorakul, Managing Director

Siam Familymart

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<u>Hotels and Resorts</u>

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Dusit Thani Hotel

946 Rama IV Rd.

Silom Bangrak

Bangkok 10500

Tel. +662-236-0450-9

Fax. +662-236-6400

Contact Person: Mr Stanley Pao, General Manager

Landmark Hotel

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Contact Person: Mr Frank Clovyn, General Manager

The Regent Hotel

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Contact Person: Mr William D. Black, General Manager

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2005/38-39 Soi Ramkamheng 29

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Contact Person: Mr David Tongkahu, General Manager

Institutional Contracts

Thai Airways International Public Co Ltd

89 CZ Building

Catering Department

Vibhavadi Rangsit Road

Donmuang, Bangkok 10210

Tel. +662 533-6217 x 1745

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Contact Person: Kulvadee Cheeptamrong, Procurement Manager

Food Service Companies

Kim Chua Trading Ltd Partnership

3059, 3059/1-3 Sukhumvit Rd

Prakanong, Bangkok 10260

Tel. +662-332-8040-9, 331-6968-70, 331-6910

Fax. +662-331-6891, 331-6911

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Yen-Argard Rd, Chong Nonsee

Yannawa, Bangkok 10120

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Contact Person: Mr Vichiean Jarukasetporn, General Manager

Choice Food Co Ltd

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Contact Person: Mr Jeramee Coombes, Sales Manager

Fine Foods International Co Ltd

524/26 Soi Soonvijai 4

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Huaykwang, Bangkok 10310

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Fax. +662-319-7352

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Ek-Thai Intertrade Co Ltd

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Wangthonglang, Bangkapi

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Contact Person: Mr Pumin Piyavanich, General Manager

Vita Fresh Co Ltd

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Rama 9 Rd, Huaykwang

Bangkok 10310

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Contact Person: Mr Barry Quartermain, Managing Director

Food Ingredient Importers

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189 Moo 6, Bangkok-Chonburi Highway (Motorway)

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Contact person: Preeda Laocharoenpornkul, Sales Manager or

Prasong Aramwittaya, Managing Director

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Mr. Marten Porsild, Managing Director

Caltech Co., Ltd.

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Bangkok 10240

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Contact person: Mr. Apichai Sophonphaiboon, Managing Director

Champaca Marketing Co., Ltd.

142/5 Soi Suksavittaya, North Sathorn Rd.

Bangrak, Bangkok 10500

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Contact person: Mr. Boonlerd Chareonkul, Managing Director

Chemical Specialties Corporation Ltd.

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Talardbangan, Laksi

Bangkok 10320

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Eugene Chemical LP.

405/7 Mahaputtharam Rd.

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Contact person: Mr Pravit Munkongpitakkul, Manager

Foodsfield International Co., Ltd.

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Foodmixes Group Co., Ltd.

SV City Tower2, 21st Fl.

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Contact person: Jintana Khuttikum, Office Manager

Mighty International Co., Ltd.

952 Soi Ladprao71,

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Contact person: Mr. Vasan Rattananupap, Managing Director

Milk Coa Trading LP

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Contact person: Mr. Mongkol Punpanishgul, Import Manager

Nutrition LP

96 Yotha Rd., Talardnoi

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Contact person: Mr. Suradej Ekpanyaskun, Managing Director

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Winner Group Enterprise Co., Ltd.

Thai CC Tower, 21st Fl., Room 215-216

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Contact person: Ms Kanokpan Kreangkralkrissada, Marketing Director

Ms Wanida San-aree, Sales Manager

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:

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Office of Agricultural Affairs

U.S. Embassy

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