

**Required Report:** Required - Public Distribution

**Date:** March 31, 2022

**Report Number:** TH2022-0024

**Report Name:** Food Processing Ingredients

**Country:** Thailand

**Post:** Bangkok

**Report Category:** Food Processing Ingredients

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**Report Highlights:**

Thailand's food and beverage industry contributes significantly to the country's economy, accounting for one-fourth of the country's gross domestic product. Major food exports include rice, canned tuna, sugar, meat, cassava products, and canned pineapple. The National Food Institute reported that the value of Thai food exports was \$34.6 billion in 2021, an increase of 11.8 percent from 2020.

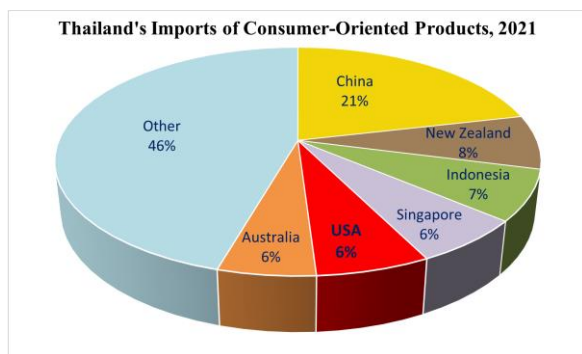
# Market Fact Sheet: Thailand

## Executive Summary

Thailand is Southeast Asia's second largest economy with a 2021 Gross Domestic Product (GDP) of \$506 billion. Thailand remains a strong agricultural competitor as it is the world's leading exporter of natural rubber, frozen shrimp, canned tuna, canned pineapples, cooked poultry, and cassava. It is also a major exporter of sugar and rice. Thailand is the 18<sup>th</sup> largest export market for U.S. agricultural products, while the United States is the third largest supplier of agricultural products to Thailand, with 11 percent of total import market share.

## Imports of Consumer-Oriented Products

In 2021, the United States was the 5<sup>th</sup> largest supplier of consumer-oriented products to Thailand with exports valued at \$445 million.



## Food Processing Industry

Thailand's food processing industry has developed rapidly and is one of the most developed in Southeast Asia. There are many medium-to-large food processors that produce high-value products for domestic and export markets. The value of Thailand's food exports was \$34.6 billion in 2021, while the value of Thailand's food ingredient imports was \$3.2 billion. With rising demand for processed foods, Thai food processors must import large quantities of food ingredients that are not locally available.

## Food Retail Industry

The Thai Retailers Association reported that Thailand's retail sector contracted 7-8 percent in the first quarter of 2021 but should begin to expand again in 2022. The food and beverage industry is one of the biggest retail segments in Thailand. The country's economic growth, coupled with higher disposable incomes in the middle-income population, a greater propensity to spend, and a trend towards urbanization fueled the growth in the

retail sector prior to the pandemic. Changes in the structure of Thai households and the pandemic have led to changes in how Thais eat with a rising demand for convenient ready-to-eat meals, healthy food products, and food delivery.

### Quick Facts 2021

**Imports of Consumer-Oriented Products:** \$7.0 billion

#### List of Top 10 Growth Products in Host Country

- |                                |                       |
|--------------------------------|-----------------------|
| 1) Dairy products              | 2) Spices             |
| 3) Seafood products            | 4) Food preparation   |
| 5) Fresh fruits and vegetables | 6) Bakery products    |
| 7) Tree nuts                   | 8) Wine and beer      |
| 9) Chilled/frozen beef         | 10) Healthy beverages |

#### Food Industry by Channels (U.S. billion) 2021

Total Agricultural Exports:	\$42.4
Total Agricultural Imports:	\$20.6
Full-Service Restaurant Sales	\$3.5
Food Delivery Sales	\$2.5
Food and Drink E-commerce Sales	\$0.5

#### Top Thailand Retailers

##### Supermarkets

- 1) Central Food Retail
- 2) Gourmet Market
- 3) Villa Market
- 4) Foodland
- 5) UFM Fuji Super
- 6) MaxValu

##### Hypermarkets

- 1) Lotus's
- 2) Big C

##### Cash and Carry

- 1) Makro

##### Convenience Stores

- 1) 7-Eleven
- 2) Family Mart
- 3) Lawson 108

#### GDP/Population

Population (millions): 69.95  
 GDP (billions USD): \$506 (as of 02/2022)  
 GDP per capita (USD): \$7,256 (as of 02/2022)

## Strengths/Weaknesses/Opportunities/Challenge

<p><b>Strengths:</b> Strong food industry with well-established retail, food service, and food processing industries.</p>	<p><b>Weakness:</b> High level of local industry protection results in restrictive trade barriers for imported food and beverages</p>
<p><b>Opportunities:</b> Rising incomes and rapid urbanization. Urban Thai consumers are more willing to pay for premium food products.</p>	<p><b>Challenges:</b> High import tariff on U.S. food exports to Thailand.</p>

**Data and Information Sources:** Euromonitor, TDM, Office of the National Economic and Social Development Board, World Bank, Kasikorn Research, and Industry Estimates, World Bank, Kbank Research, and Industry Estimates

## SECTION I – MARKET SUMMARY

The COVID-19 pandemic significantly affected the food and beverage sector in Thailand in 2021 and continues to slow down the economy and purchasing power of consumers. Thailand is one of the world’s leading agricultural suppliers, primarily due to its well-developed food processing sector and global recognition for its quality control and standards, which enables Thailand to export value-added products to international markets like the European Union (EU), Japan, China, and the United States. Thailand’s food and beverage industry contributes significantly to the country’s economy, accounting for one-fourth of the country’s gross domestic product. Major food exports include rice, canned tuna, sugar, meat, cassava products, and canned pineapple. The Thai government envisions Thailand becoming a key global player in the “Future Food” market by designating food and beverages as one of the five targeted industries under the “Thailand 4.0 strategic economic development plan.” The strategy aims to invest in research and development (R&D) and innovation to strengthen Thailand’s leading position in the food industry and enhance the value of Thai food exports. There are significant opportunities for U.S. food ingredients to collaborate with Thai food manufactures in developing new and innovative food products.

The National Food Institute reported that the value of Thai food exports was \$34.6 billion in 2021, an increase of 11.8 percent from 2020. As concerns on the impact of COVID-19 have eased, there has been increased economic activity and more demand for food from the recovering restaurant and hotel sectors. Although a number of external risk factors still exist, including high freight costs, container shortages, and the volatile oil prices, Thai food and beverage exports are expected to reach \$35.8 billion in 2022, a growth of 8.4 percent. The product categories that are likely to experience continuous export growth are ready-to-eat food, cassava starch, shrimp, coconut products, pineapple, and seasonings.

### Thailand’s Major Agricultural Product Exports

Products	(in \$ millions)	
	2020	2021
Fishes and products	5,989	5,759
Rice and products	4,408	4,087
Meat products	5,037	5,154
Fruits and products	3,142	3,743
Sugar and products	2,243	1,987
Cassava and products	1,879	2,969
Beverages	1,773	1,761
Vegetables and products	859	898
Residues and waste, prepared animal fodder	636	791
Dairy products	416	416
Tea and coffee	151	164
Other agricultural products	5,374	5,963
<b>Total</b>	<b>31,907</b>	<b>33,691</b>

Source: Office of Agricultural Economics, Ministry of Agriculture and Cooperatives

### Thailand’s Major Agricultural Product Imports

Products	(in \$ millions)	
	2020	2021
Fishes and products	4,358	3,842
Food crops and products	2,310	2,394
Residues and waste, prepared animal fodder	1,812	2,162
Oil plants	1,767	2,412
Fruits and products	1,480	1,308
Other food products	1,149	971
Vegetables and products	759	680
Milk and products	714	786
Tea and Coffee	295	290
Meat Products	934	665
Beverages	484	302
Other agricultural products	2,824	2,371
<b>Total</b>	<b>18,886</b>	<b>18,184</b>

Source: Office of Agricultural Economics, Ministry of Agriculture and Cooperative

Thailand exported \$3.8 billion worth of halal products in 2021, an increase of 3 percent from 2020. Thailand is the 11th largest halal food exporter in the world and the largest halal exporter among member countries in the Association of Southeast Asian Nations (ASEAN). Thailand’s exports of halal food products include vegetables, fruits, rice, sugar, poultry, seafood, and processed products, such as ready-to-eat meals, seasonings, beverages, and snacks.

Opportunities in Thailand’s food processing sector continue to grow. Domestic sales of processed foods are rising due to a major shift in consumption patterns towards convenience food items such as ready-to-eat meals, rice, noodles, bakery, functional drinks, and snacks. With the rapid growth of e-commerce, the food retail segment is also evolving. This growth is also pushing up consumers’ demand for processed foods.

Domestic Food Product Sales 2020-2021							
Product	Unit	2020	2021	Product	Unit	2020	2021
Soy sauce	liters	92,031,048	96,482,084	Canned tuna	tons	33,970	34,484
Fish sauce	liters	88,325,508	84,359,092	Frozen fish	tons	50,239	54,911
Frozen & chilled chicken meat	tons	1,865,984	1,842,149	Cake	tons	40,386	42,823
Sugar	tons	1,668,195	1,565,644	Sausage	tons	46,591	51,297
Drinking milk	tons	1,014,089	1,014,553	Wafers	tons	24,266	26,879
Yoghurt drinks	tons	458,512	457,824	Frozen shrimp	tons	30,590	36,430
Fruit juice	tons	446,247	334,010	Canned pineapple	tons	23,573	25,086
Instant noodles	tons	243,150	263,792	Frozen fruit& vegetable	tons	4,184	4,450
Ice cream	tons	148,703	120,150	Cookies	tons	3,848	3,755
Canned sardines	tons	92,473	92,352	Ham	tons	3,704	3,120

Source: The Office of Industrial Economics

Advantages	Challenges
Thailand has a relatively well-developed food processing sector. The country is a major producer and exporter of processed food products.	Thailand is a country with abundant raw materials, making entry of raw ingredients difficult.
Thai processed food products have a high reputation for their quality and taste. The food processing sector actively develops and introduces new products, creating demand for new food ingredients.	Many suppliers of food ingredients in Thailand are able to produce products domestically that meet international standards.
Healthy foods and beverages are becoming increasingly popular and have spurred a high demand for health-promoting products that boost the immunity system, improve digestive health, and well-being.	There is strong competition on the local market from domestic producers and increasing imports from the EU and countries that have free trade agreements (FTA) with Thailand, such as Australia, New Zealand, China, South Korea, Japan, India, and Peru.
The Thai government wants to push Thailand to become ASEAN's processed food hub by 2027, which has increased demand for new food ingredients for new processed food product development.	Local production is increasingly substituting traditional food imports. Processors are producing products that are relatively inexpensive but have high freight costs (e.g., snack food, salad dressing, sauces, jams, and other processed foods).
The rapid emergence and expansion of on-line platforms, as well as food delivery, have stimulated demand for bakery products, dairy products, meat and poultry, and other food ingredients.	The market is saturated with low-cost food ingredients from China and other countries that have an FTA with Thailand.
According to the Statista, the e-commerce market is expanding rapidly in Thailand, reaching 36.6 million users in 2021 from 22.8 million virtual shoppers in 2017.	High import tariffs for some U.S. products have caused some importers to source products from other countries that have an FTA with Thailand.

## SECTION II – ROAD MAP FOR MARKET ENTRY

### Entry Strategy

U.S. exporters looking to sell food ingredients to Thailand should establish good relationships with local importers, distributors, and food manufacturers. The right trade partners can offer U.S. exporters valuable market insights, and major food ingredients importers and food manufacturers have established relationships with relevant government authorities. Another effective entry strategy is attending local or regional trade shows to establish new contacts and to assess market

potential. Post recommends U.S. exporters attend Food Ingredients Asia 2022 (<https://www.figlobal.com/asia-thailand>). Thai buyers and food processors looking for new food ingredients regularly attend this show.

### Market Structure

There are two main channels for exporting food ingredients to Thailand. The first channel is through importers that have their own distribution network and distribute directly to manufacturers. The second channel is through food and beverage manufacturers that can import directly from the country of origin.

### Import Procedures

Food import procedures for Thailand are available at “[Thailand: Food and Agricultural Import Regulations and Standards Country Report](#)”

### Sector Trends

Thailand’s food processing industry has developed rapidly over the past decade and is one of the most developed in Southeast Asia. Most food processors are small-to-medium sized and predominantly serve the domestic market. However, there are many medium-to-large food processors that produce higher-value products for domestic and export markets.

### Sales of Packaged Food by Sector (in \$ millions)

Products	2017	2018	2019	2020	2021
Dairy	3,018	3,318	3,554	3,263	3,493
Rice, Pasta and Noodles	1,680	1,828	1,979	2,213	2,385
Savory Snacks	1,253	1,397	1,523	1,353	1,471
Sauces, Dressings and Condiments	1,243	1,356	1,474	1,527	1,598
Baked Goods	882	988	1,099	1,170	1,260
Baby Food	957	960	996	1,005	999
Confectionery	717	775	820	770	813
Edible Oils	610	593	714	861	1,001
Processed Meat and Seafood	555	606	667	721	789
Ready Meals	474	544	626	623	682
Sweet Biscuits, Snack Bars and Fruit Snacks	368	413	450	450	474
Ice Cream and Frozen Desserts	361	394	430	404	432
Breakfast Cereals	70	76	83	86	91
Sweet Spreads	73	79	84	84	89
Processed Fruit and Vegetables	62	67	72	73	76
Soup	11	12	13	12	13
<b>Total</b>	<b>12,246</b>	<b>13,390</b>	<b>14,596</b>	<b>15,475</b>	<b>15,665</b>

Source: Euromonitor

The packaged food industry is highly fragmented, with the top ten companies controlling about one-third of the sales value. Thailand’s processed food sector uses a variety of inputs including dairy-based ingredients, wheat, soybean, seafood, poultry, rice, grains, sugar, juice concentrate, meat, nuts, dried fruits, pulses, etc.

Behavior of consumers has changed due to the COVID-19 pandemic, such as spending more at convenience stores, supermarkets, and online through e-commerce platforms. Consumers have spent less time outside, made purchases more cautiously - mainly only on necessities, and increased consumption of quick and convenient food. Demand for ready-to-eat products are also fueling interests in new and exciting processed foods.

## Major food and beverage processors in Thailand

Company Name	Nature of Business	2021 Sales Value (in \$ Million)
Charoen Pokphand Foods	A manufacturer of semi-cooked and cooked meat as well as ready-to-eat meal products including food retail and restaurants.	16,034
Ichitan Group	A manufacturer of ready-to-drink green tea beverage, herbal drink, and low-sugar ready-to-drink tea beverage.	164
Malee Group	A manufacturer of canned fruit and fruit juices under “Malee.”	108
President Bakery	A manufacturer of bakery products under the brand name “Farmhouse.”	224
Premier Marketing	A manufacturer of fish snack products under “Taro” brand, tuna, and other seafood products, and tomato ketchup, chili sauce, and other seasoning sauce under “King’s Kitchen” brand.	136
Sappe	A manufacturer of functional beverages, fruit juice/juice drink, functional powder and ready to drink products.	108
S&P Syndicate	A manufacturer of bakery products and frozen foods as well as food service operator	151
Seafresh Industry	A manufacturer of frozen shrimp including cooked shrimp, raw, shrimp, breaded shrimp, and sushi. Seafresh exports the majority of its products under its own brands.	212
Surapon Foods	A manufacturer of frozen foods including ready-to-cook and ready-to-eat.	172
Tipco Foods	A manufacturer of canned pineapple, pineapple concentrate, mixed fruit juice, and ready-to-drink beverage.	76
Taokaenoi Food & Marketing	A manufacturer and distributor of snack products category both domestically and internationally under brand "Tao Kae Noi," including other snack and healthy product.	113
Thai Union Group	A manufacturer of frozen, canned seafood, and snacks of various types, especially seafood.	4,411
Osotsapa	A manufacturer of nonalcoholic beverages including energy drinks, functional drinks, ready to drink coffee, and other consumer products.	837
S. Khonkaen Foods	A manufacturer of Thai food, seafood products, meat-based snacks, frozen food, and ready-to eat meals.	87
NR Instant Produce	A manufacturer and exporter of ethnic food, plant-based food, and functional products.	66
NSL Foods	A manufacturer of bakery, snacks, and frozen ready-to-eat food for supermarkets and convenience store chains.	95
Srinnaporn Marketing	A manufacturer and distributor of snack and beverage products such as jelly, fruit juice with Carrageenan and konjac powder, fish and squid products, fruit and herb drinks, etc.	136

Thailand is one of the fastest-growing e-commerce markets in Southeast Asia and even around the world. E-commerce and online marketplaces have started playing a key role in the food sector as a faster and more convenient channel that provides a better experience to customers. Another interesting trend in Thailand is the growing interest in using cannabis and hemp ingredients in food and beverage. Under the new regulation, which will take effective in June 2022, Thailand will allow the use of every part of the hemp and cannabis plant, including seeds grown locally in Thailand, as food ingredients so long as the part of the plant contains less than 0.2% of Tetrahydrocannabinol (THC) by weight. Consumer studies show a strong consumer interest in products containing hemp and cannabis. Major food and beverage manufacturers have invested in research and development of hemp and cannabis products and have already developed new cannabis-infused food products, such as beverages, health snacks, bakery, and food supplements. A report on hemp and cannabis foods and beverages in Thailand is available at FAS USDA Gain report “[Thailand’s Industrial Hemp report.](#)”

## Major Segments in the Food Processing Industry

**Ready-to-Drink Non-Alcoholic Beverages** – Kasikorn Research Center reported that the market value of the ready-to-drink non-alcoholic beverage sector was \$6.2 billion in 2021, a slight improvement from 2020. The pandemic has amplified consumer trends in health and well-being increased demand for innovative, well-being, and healthy products. Euromonitor estimated Thailand’s fortified and functional beverage market in 2021 was at \$1.6 billion and forecasted it

to reach 2 billion in 2026. Vitamin infused waters, herbal functional drinks, fortified fruit jelly, sport drinks with potassium and magnesium, high protein drinks, and beverages fortified with collagen, antioxidants, and hyaluronic acid for skin nourishing and anti-ageing are examples of beverage products that have gained in popularity for their health benefits. Beverage powders are also surging including collagen powders, coffee powder for weight control purpose, Chlorophyll powder, protein blends, whey protein powder, and herbal extracts. Thai consumers are ready to pay a premium for functional benefits. Therefore, beverage manufacturers are embracing innovation and seeking new beverage ingredients to gain a larger share of the growing market.

**Processed Seafood** – Processed seafood products are an important export for Thailand (e.g., most canned and frozen fish products are exported), and processed seafood holds the largest share of Thailand fishery product export, more than 71 percent. The value of Thailand’s processed seafood exports was \$3.5 billion in 2021, 10.6 percent less than the previous year. The reduced exports in 2021 were more in line with previous years after a dramatic increase of exports during the pandemic in 2020. Rising shipping costs and logistics difficulties (e.g., global container shortage and workforce disruptions from COVID-19) also reduced exports in 2021. Seafood processors produce and export a variety of products, from basic raw frozen products to value-added products. Canning processors mainly use tuna, sardines, and mackerel as well as other processed seafood products made from salmon, cuttlefish/squid, pollock, shrimp, clams, and crabs. Popular Thai brands include Three Lady Cooks, Roza, Sealect, Hi-Q, Ayam, Nautilus, and Pumpui. Processors anticipate an increase in demand for processed seafood products as the COVID-19 situation improves and the global economy recovers and forecasted that the value of Thailand’s processed seafood exports will reach \$4.1 billion in 2022.

**Snack Foods** – Kresearch reported that Thailand’s market for snack foods totaled \$1.2 billion in 2021, a contraction of 4 percent from the previous year. Potato snacks, with a 7.2 growth rate, led the snack food market at 39 percent market share, followed by extruded snacks at 30 percent, nuts at 12 percent, and fish snacks at 8 percent. Snacking trends are changing as consumers are increasingly looking for snacks that are not only tasty but also good for their health. Consumers are looking for snacks with essential nutrients and that incorporate other functions such as high protein, vitamins, and fiber. A number of food manufacturers launched snacks that are low in sodium and have no added sugar like crispy veggies and fruits snacks through modern retail markets and e-commerce platforms. Consumers are demanding innovative, on-the-go, and healthy snack options that fit their changing lifestyles and busy schedules. Not only has the demand for meat-based, fish, and seafood snacks increased, but demand for plant-based snacks with high protein has also increased. Processors are introducing new plant-based snacks using ingredients such as peas, potato flour, potato starch, mushrooms, other fruits and vegetables, and tofu to cater to consumers who demand healthier snacks.

**Bakery** – Sales of bakery products are unchanged from the previous year at \$1.2 billion in 2021. The consumer expenditure on bread and cereals in 2021 was \$185.8 per capita, a contraction of 10.2 percent from 2020. The Euromonitor forecasts that the bakery market in Thailand will grow as consumers are eating more bakery products for their convenience and availability. The most popular bakery products in Thailand are pastries, cakes, and bread. Urban Thais also consume bakery products as main meals, especially breakfasts foods such as waffles, croissants, pancake, sandwiches, pies, and muffins. Sweet bakery products are a staple item for Thai consumers as



over one-third are consuming sweet bakery products 2-6 times per week. Convenience stores and supermarkets are the largest distributors of bakery products, followed by quick service restaurants located in shopping malls and office building catering to urbanites. Bakery manufacturers anticipate using more healthy ingredients, such as fibers, dried fruits and nuts, and grains, to offer a variety of new bakery products that are healthy and delicious.

**Fruit and Vegetable Juices** – The market value of Thailand’s ready-to-drink fruit and vegetable juices was \$273 million in 2021, a 12 percent drop from the previous year. Juice manufacturers estimate that sales of ready-to-drink fruit and vegetable juice in 2022 will be similar to 2021. The leading juice manufacturers include [Tipco](#), [Malee](#), [Unif](#), [Chabaa](#), and [Doikham](#). The premium market segment (i.e., 100 percent and vegetable juice) includes both ultra-high temperatures processed and pasteurized beverages with 2021 sales at \$99 million. Orange juice is the most popular flavor followed by apple, guava, grape, tomato, pineapple, and pomegranate. Thai consumers tend to consume beverages with less sugar or that are sugar-free to strengthen their immune system. Fruit and vegetable beverages are subject to an excise tax charged based on the suggested retail price (SRP) and an excise tax on the amount of sugar, which went into effect in September 2017. This sugar tax will increase every two years through 2023, raising the cost of sugary beverage products. However, the third phase of the sugar tax was to effect on October 1, 2021, but the Thai government postponed it to October 1, 2022. The Thai government also postponed the fourth phase to start on October 1, 2024. Recently fruit and vegetable beverage manufacturers have focused more on developing new products that offer health benefits and are looking for new and functional healthy ingredients.

**Ready-to-Eat Products** – The COVID-19 pandemic also catalyzed the growth of the ready-to-eat food market. In 2021, the ready-to-eat food market reached sales of \$658 million, an 11 percent increase from the previous year. Food manufacturers expect the domestic demand for ready-to-eat meals to grow 12-14 percent in 2022. An increasing level of urbanization, hurried lifestyles, growing numbers of convenience stores, a variety of menu choices, and increased access to ready-to-eat food has driven the rapid expansion of the ready-to-eat food market in Thailand. Major players are CP All, Charoen Pokphand Foods, S&P Syndicate, Surapon Foods, Prantalay Marketing, and Ek-Chai Distribution Systems. CP All continues to lead this market selling ready-to-eat-meals through its 7-Eleven convenience stores, which is the category’s main distribution channel. Popular menus for ready-to-eat meals are Thai local dishes (such as spicy Thai basil chicken with rice, fried rice with crab meat, Thai curry with rice, and fish rice porridge) and other Asian and western style dishes (such as dumplings, buns, spaghetti, burger, and pizza). Food manufacturers of chilled and frozen ready-made meals are seeking to cater to health-conscious consumers with busy lifestyles by incorporating healthier ingredients such as fish, meats, pulses, whole grains, cheeses, and vegetables into their products.

**Plant-based food** – Euromonitor estimated that the market value of plant-based food in Thailand will surge from \$845 million in 2019 to \$1.5 billion in 2024, with an average annual growth of 10 percent. The rise of vegan and flexitarian consumers are fueling the demand for plant-based proteins such as soy protein, pea protein, and rice proteins. In addition, plant-based proteins are gaining popularity as a sports supplement. More and more restaurants in the country are adding meatless and plant-based protein options to their menus to cater to both vegetarians and ordinary customers. Food manufacturers have developed alternative meat, milk, egg, and plant-based beverages and are expecting that meat and milk alternatives will be in high demand in 2022. Although soy milk still dominates, the alternative milk market has become increasingly competitive due to the introduction of other plant-based milk, including almond, corn, pistachio,



rice, oat, sesame, and coconut. Almond milk, for example, is increasingly gaining market share in the alternative milk market. More information about this market is available at “[Plant-Based Food and Beverage Market in Thailand](#)” report.

### SECTION III – COMPETITION

Thailand’s food ingredient imports reached \$3.2 billion in 2021. The United States is the fourth largest supplier of these products. The import value of U.S. dairy ingredients, dried fruits, tree nuts, fish, yeasts, malt extracts, and cocoa powder all grew in 2021. Although domestic ingredients hold the greatest share of the market, they tend to be low-value items. High-value raw and semi-processed products, such as grains, dairy ingredients, specialty bakery and snack ingredients, functional food and beverage ingredients and plant-based ingredients, are generally not available locally.

#### Thailand Food Ingredient Imports from the World

Partner Country	Value in Thousands of U.S. Dollars		% Change
	2020	2021	
China	436,740	490,871	12.39
Singapore	408,719	411,933	0.79
New Zealand	312,975	345,371	10.35
United States	322,945	318,656	(1.33)
Indonesia	226,721	292,851	29.17
Vietnam	258,353	210,910	(18.36)
Australia	145,819	172,376	18.21
Malaysia	116,787	122,725	5.08
Netherlands	64,259	68,116	6.00
India	58,197	119,807	105.87
Other	572,255	668,665	16.85
<b>Total</b>	<b>2,923,769</b>	<b>3,222,281</b>	<b>10.21</b>

Source: Trade Data Monitor and USDA Foreign Agricultural Service – Bangkok, Thailand

Importers report that U.S. food ingredients are generally less competitive in terms of price, service, and delivery time but offer high-quality and innovative products. U.S. exporters need to focus on product innovation, services, technical support, and quality, and position their products in the middle-high price range. Trade shows such as Food Ingredients Asia and local market promotions are highly effective ways to promote U.S. food ingredients and compete with similar products from China, Europe, Australia, New Zealand, Canada, and other ASEAN countries. U.S. suppliers must be

prepared to lend considerable technical support to food processors and distributors to develop products that will boost demand for their ingredients.

#### Thailand’s Food Ingredient Imports from the United States, 2020-2021

Unit: U.S. Dollars

Description	2020	2021
Milk and Cream, concentrated or containing added sweetening	27,675,715	29,806,411
Almonds, fresh or dried, shelled and in shell	24,990,692	22,483,265
Whey and other products	20,110,418	19,489,905
Vegetable Saps and Extracts; Pectic Substances, Pectinates and Pectates; Agar-Agar and other Mucilages and thickeners, derived from vegetable products	9,116,219	10,314,796
Cheese and Curd	7,009,600	7,021,664
Malt Extract; food preparations of flour, meal, etc.	5,034,071	5,092,988
Pistachios, fresh or dried, shelled and in shell	5,845,252	3,596,817
Hazelnuts or filberts (Corylus Spp.) fresh or dried, in shell	3,584,523	2,042,180
Yeasts	3,497,965	3,994,433
Raisin	3,449,432	3,833,011
Vegetables, dried, whole, cut, sliced, broken or in powder, but not further prepared	3,264,832	3,518,524
Essential oils, concretes and absolutes	2,270,372	2,860,771
Leguminous vegetables, dried shelled	1,537,646	1,517,531
Walnuts, fresh or dried, shelled and in shell	1,411,056	1,200,659
Prunes, dried	1,101,915	845,694
Food Preparations, Nesoi	190,083,391	189,168,320
Other food ingredients	12,962,362	9,291,308
<b>Total Food Ingredients</b>	<b>322,945,461</b>	<b>318,655,689</b>

Source: Trade Data Monitor and USDA Foreign Agricultural Service – Bangkok, Thailand

## **Section IV - Best Product Prospects**

### Products Present in the Market that Have Good Sales Potential

- Healthy and functional food ingredients including dried fruits, nuts, pulses, plant-based proteins (e.g., soybean, nuts, and pulses), dairy proteins, nutrients, vitamins, minerals, prebiotics, probiotics, dietary fiber, essential oils, and collagen. There is also a growing demand for organic, gluten free, plant-based, herbal extracts, and immune boosting food ingredients.
- Sweeteners used in non-alcohol beverages and the confectionery industry. Beverage manufacturers are reducing sugar content to minimize the impact from the excise tax.
- Fish fillets for processed seafood, frozen food, and ready-to-eat products.

### Products Not Present in Market with Good Sales Potential

- Products that can be substituted for traditional ingredients such as preservative-free ingredients that provide extended shelf life and nutrient/functional ingredients. Thai consumers prefer foods that are flavor-intensive, palate-pleasing, and healthy.

### Products Not Present Because They Face Significant Barriers

- Pork products, chicken, and novel ingredients that have a history of use less than five years.

## **Section V - Post Contact and Further Information**

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 comment regarding this report should be directed to the Foreign Agricultural Service in Bangkok at the following addresses:

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Email: [agbangkok@usda.gov](mailto:agbangkok@usda.gov)  
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### **Attachments:**

No Attachments