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Thailand

HRI Food Service Sector

Report

2004

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Report Highlights:
Thailand is Southeast Asia's second largest economy and its economy has shown remarkable improvement with forecast growth of 9 percent for year 2004. Thailand imported $80 million in consumer oriented foods from the U.S. in 2002, up 22 percent over 2001's $65 million. The HRI food service sector comprises approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. Thai consumer expenditure on food at all food service outlets was estimated to be $5.7 billion in 2001.

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TABLE OF CONTENTS

SECTION I: MARKET SUMMARY

Market Overview

Thailand is Southeast Asia's second largest economy and its economy has shown remarkable improvement with growth forecast to be 9 percent for 2004 following growth of 6.3 percent in 2003. Domestic spending and a rebound in exports bolstered the renewed growth that occurred in 2003. Higher consumer confidence resulting from falling unemployment and rising farm and non-farm incomes will boost consumption expenditures, which will have positive effect on the HRI sector. Per capita income increased from $1,831 in 2001 to $1,992 in 2002. The Baht firmed in 2003, with the baht reference rate averaging 39.90 to the U.S. dollar in November 2003, considerably stronger than the 43.00 recorded in 2002. Due to the excess liquidity of Thai banks and financial institutions, special promotional packages of personal loans and credit facilities are being introduced to the Thais, especially the low to middle income segment. This "easier credit" has stimulated the purchasing power of Thai consumers, changed the buying and consumption pattern, helped encourage Thai people to eat out more and is pushing, led the growth in the overall foodservice market.

Thailand imported $80 million in consumer oriented foods from the U.S. in 2002, up 22 percent over 2001's $65 million. Thailand's large HRI food service sector comprises approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. Hotels, resorts, restaurants and institutional service are heavy users of imported food for food preparation and ready-to-eat meals at restaurants, catering services for airlines and cruise lines. Thai consumer expenditure on food at all food service outlets was estimated at $5.7 billion for 2001.

Tourism Industry

In general, the tourism industry has recovered since the beginning of 2002 as foreign tourists returned to Thailand. At the same time, this sector also benefited from the continued efforts of the government to promote tourism in Thailand. With over 323 billion Baht (US$ 7.5 billion) in tourism revenue in 2002, representing about 6% of Thailand's GDP, the tourism industry holds an important role in generating income and growth for the country. Thailand's diverse geography offers a tremendous range of adventures and activities for tourists such as diving, sailing, trekking, golfing, cave explorations, and rock climbing. This helps make Thailand one of the world's most favorite tourist destinations, with nearly 11 million tourists visiting Thailand in 2002 (up by 7.3 percent from the previous year). They were staying longer, too, for about 8 days on average. Average hotel occupancy rate was 61 percent. Approximately 58 percent of the tourists came from East Asia, with a large increase in the number of tourists from neighboring countries, namely Malaysia, Vietnam, Cambodia, Hong Kong and Korea. Tourists from Europe and the United States showed stable growth and accounted for 22.77 and 5.98 percent of the total number of tourists, respectively.

Tourism Overview, Thailand 2000-2004

Year	International						
	Tourist		Average	Average Expenditure		Revenue	
	Number (Million)	Change %	Length of Stay (Days)	/person/day (Baht)	Change (%)	Million (Baht)	Change (%)
2000	9.51	+10.82	7.77	3,861	+4.23	285,272	+12.75
2001	10.06	+5.82	7.93	3,748	-2.93	299,047	+4.83
2002	10.80	+7.33	7.98	3,754	+0.16	323,484	+8.17
2003 /1	9.70	-10.15	7.96	3,750	-0.10	289,600	-10.47
2004 /2	12.00	+23.67	8.00	4,000	+6.67	383,900	+32.56

Year	Domestic						
	Thai Visitor		Average	Average Expenditure		Revenue	
	Trip (Million)	Change %	Length of Stay (Days)	/person/day (Baht)	Change (%)	Million (Baht)	Change (%)
2000	54.74	+2.08	2.48	1,718	+12.79	210,516	+3.61
2001	58.62	+7.09	2.51	1,703	-0.89	223,732	+6.28
2002	61.82	+5.45	2.55	1,690	-0.77	235,337	+5.19
2003 /1	65.10	+5.31	2.65	1,750	+3.58	301,900	+28.28
2004 /2	67.12	+3.10	2.70	2,000	+14.29	362,500	+20.07

Remark: /1 = Trend /2 = Target

Source: Tourism Authority of Thailand

Number of International Tourists Arrivals: January – December 2002

Country of Residence	2002		2001		% Change 2002/2001
	Number	%Share	Number	%Share	
East Asia	6,564,664	60.38	6,095,979	60.16	7.69
Europe	2,475,319	22.77	2,327,680	22.97	6.34
The Americas	650,195	5.98	613,897	6.06	5.91
South Asia	391,371	3.6	333,936	3.3	17.2
Oceania	427,014	3.93	430,806	4.25	-0.88
Middle East	274,878	2.53	239,200	2.36	14.92
Africa	89,535	0.82	91,011	0.9	-1.62
Grand Total	**10,872,976**	**100**	**10,132,509**	**100**	**7.31**

Source: Tourism Authority of Thailand

Due to the effect of the conflict in Iraq and the SARS phenomenon, it is projected that, for the whole year of 2003, foreign tourist arrivals declined by 10.15 percent to 9.70 million, with total tourism revenue estimated at 290 billion Baht ($6.7 billion). However, these arrivals figures should accelerate again. By the end of 2004 the number of tourists is anticipated to reach 12 million, an increase of 32.56 percent from 2003. This is due to the continual launch through 2003 and 2004 of various aggressive marketing campaigns by the Tourism Authority of Thailand that are aimed at promoting the tourism industry of Thailand. The goal is to turn the country into the tourism hub of Asia by 2006 by offering a variety of tourist products, emphasizing the distinctive hospitality of the Thai culture; focusing on eco-tourism as it develops into a new global trend; and by targeting the youth market and the luxury, up-scale tourist segment.

Domestic Tourism in Phuket 2003

Type of Data	Jan. - Jun.		
	2003	2002	% Change
Visitor	**2,005,319**	**2,072,691**	**-3.25**
------Thai	652,885	619,265	5.43
------Foreigners	1,352,434	1,453,426	-6.95
Tourist	**1,933,748**	**2,001,119**	**-3.37**
------Thai	614,782	583,098	5.43
------Foreigners	1,318,966	1,418,021	-6.99
Excursionist	**71,571**	**71,572**	**0**
------Thai	38,103	36,167	5.35
------Foreigners	33,468	35,405	-5.47
Average Length of Stay (Day)	**4.97**	**5**	-
------Thai	4.17	4.14	-
------Foreigners	5.35	5.35	-
Average Expenditure (Baht / Person / Day)			
Visitor	**3,388.16**	**3,431.80**	**-1.27**
------Thai	2,332.56	2,329.18	0.15
------Foreigners	3,897.75	3,901.59	-0.1
Tourist	**3,460.05**	**3,502.65**	**-1.22**
------Thai	2,407.65	2,404.41	0.13
------Foreigners	3,950.59	3,954.25	-0.09
Excursionist	**1,445.55**	**1,450.84**	**-0.36**
------Thai	1,120.90	1,116.21	0.42
------Foreigners	1,815.17	1,792.69	1.25
Revenue (Million Baht)			
Visitor	**34,157.82**	**35,906.73**	**-4.87**
------Thai	6,222.06	5,844.69	6.46
------Foreigners	27,935.76	30,062.04	-7.07
ACCOMMODATION ESTABLISHMENTS			
Establishments	549	510	7.65
Rooms	31,302	26,759	-16.98
Occupancy Rate (%)	55.94	57.68	-1.74
Average Length of Stay (Day)	3.8	3.24	-
Number of Guest Arrivals	1,659,879	1,730,240	4.07
----- Thai	449,385	425,485	5.62
----- Foreigners	1,210,494	1,304,755	-7.22

Source: TAT, Southern Office

No. of Tourists Arrivals in Phuket 2002

Location	Thai Tourists	International Tourists	Total
Patong	652,168 (56%)	1,300,128 (46%)	1,952,296 (49%)
Kata	290,592 (25%)	678,244 (24%)	968,836 (24%)
Karon	259,223 (22%)	550,837 (20%)	810,060 (20%
Ampur Mueng	189,996 (16%)	773,819 (27%)	960,815 (24%)
Phromthep	424,208 (36%)	198,194 (7%)	622,402 (16%)

Domestic Tourism in Phang Nga 2003

Type of Data	Jan. - Mar.		
	2003	2002	% Change
Visitor	**951,396**	**864,233**	**10.09**
------Thai	254,572	203,772	24.93
------Foreigners	696,284	660,461	5.51
Tourist	**164,723**	**145,514**	**13.2**
------Thai	72,028	57,657	24.92
------Foreigners	92,695	87,857	5.51
Excursionist	**786,673**	**718,719**	**9.45**
------Thai	182,544	146,115	24.93
------Foreigners	604,129	572,604	5.51
Average Length of Stay (Day)	**4.13**	**4.31**	-
------Thai	1.85	1.85	-
------Foreigners	5.9	5.9	-
Average Expenditure (Baht / Person / Day)			
Visitor	**1,635.58**	**1,639.67**	-0.25
------Thai	1,439.38	1,436.66	0.19
------Foreigners	1,689.40	1,686.68	0.16
Tourist	**1,662.02**	**1,661.38**	**0.04**
------Thai	1,545.56	1,540.68	0.32
------Foreigners	1,690.37	1,686.16	0.25
Excursionist	**1,612.73**	**1,620.81**	**-0.5**
------Thai	1,361.91	1,360.77	0.08
------Foreigners	1,688.52	1,687.16	0.08
Revenue (Million Baht)			
Visitor	**2,399.43**	**2,203.59**	**8.89**
------Thai	454.47	363.1	25.16
------Foreigners	1,944.96	1,840.49	5.68
ACCOMMODATION ESTABLISHMENTS			
Establishments	98	93	5.38
Rooms	2,818	2,591	8.76
Occupancy Rate (%)	57.39	61.38	-3.99
Average Length of Stay (Day)	4.02	4.64	-
Number of Guest Arrivals	**105,790**	**94,348**	**12.13**
----- Thai	40,182	32,164	24.93
----- Foreigners	65,608	62,184	34.3

Source: TAT, Southern Office

Domestic Tourism in Krabi 2003

Type of Data	Jan. - Mar.		
	2003	2002	% Change
Visitor	**541,787**	**515,018**	**5.2**
------Thai	258,628	194,357	33.07
------Foreigners	283,159	320,661	-11.7
Tourist	**428,028**	**405,502**	**5.56**
------Thai	206,660	155,314	33.06
------Foreigners	221,368	250,188	-11.52
Excursionist	**113,759**	**109,516**	**3.87**
------Thai	51,968	39,043	33.1
------Foreigners	61,791	70,473	-12.32
Average Length of Stay (Day)	**4.48**	**4.67**	**-**
------Thai	3.49	3.5	-
------Foreigners	5.41	5.39	-
Average Expenditure (Baht / Person / Day)			
Visitor	**2,392.38**	**2,453.09**	**-2.47**
------Thai	1,969.06	1,954.40	0.75
------Foreigners	2,652.52	2,657.77	-0.2
Tourist	**2,445.90**	**2,510.73**	**-2.58**
------Thai	2,008.38	1,994.42	0.7
------Foreigners	2,709.63	2,718.76	-0.34
Excursionist	**1,489.29**	**1,458.32**	**2.12**
------Thai	1,422.80	1,397.96	1.78
------Foreigners	1,545.21	1,491.77	3.58
Revenue (Million Baht)			
Visitor	**4,864.86**	**4,905.52**	**-0.83**
------Thai	1,523.99	1,137.27	34
------Foreigners	3,340.87	3,768.25	-11.34
ACCOMMODATION ESTABLISHMENTS			
Establishments	290	254	14.17
Rooms	9,088	7,413	22.6
Occupancy Rate (%)	49.63	65.68	-16.05
Average Length of Stay (Day)	2.64	2.91	-
Number of Guest Arrivals	**306,453**	**303,974**	**0.82**
----- Thai	114,479	85,080	34.55
----- Foreigners	191,974	218,894	-12.3

Source: TAT, Southern Office

Thailand has developed into a major convention and incentive destination for the Asian Region, competing with Singapore and Hong Kong. The number of arrivals for convention purposes increased from 89,677 in 2001 to 106,853, or by 19.15%, in 2002. During mid-October of 2003, Thailand was the host country of the Asia Pacific Economic Cooperation (APEC) forum, which culminates in a summit of heads of state, ministers and chief executive officers from 22 countries. It is anticipated that this meeting will induce more investment from other APEC member countries and generate more business opportunities in Thailand. The plans to establish the Meeting, Incentive, Convention and Exhibition (MICE) Bureau and new two convention centers in Chiang Mai and Phuket also help to increase the competitive advantage of Thailand.

International Conventions/Meetings in Thailand

	1999	2000	2001	2002	2003*	2004*
No of Events	914	1,324	1,066	1,292	1,373	1,469
% Change	13.8	44.9	-19.5	21.2	6.3	7.0
No. of Foreign Participants	77,205	98,895	102,953	114,800	129,657	146,632
% Change	15.2	28.1	4.1	11.5	12.9	13.1

Source: the Tourism Authority of Thailand (TAT)
* Estimates by TAT

The trend in the Thailand tourism industry in 2004 is expected to show an increasing growth rate, and the HRI industry in general is expected to achieve a higher growth rate of approximately 3-5%. The MICE market is forecast to expand more due to heightened awareness of Thailand's attractions after the APEC events of 2003, when Thailand was the host of the regional group for the year.

Hospitality Industry

The hotel business trend of 2004 is expected to see an increasing occupancy rate of 8 percent with an expected occupancy rate at 66%. Bangkok hotels should have a higher occupancy up about 8 percent. The northern part of Thailand should grow by 6-7 percent due to many promotional activities by TAT and the arrival of two Giant Pandas loaned by the Chinese Government for research and display at the Chiang Mai Zoo. Southern Thailand is predicted to have an occupancy rate of 65-70 percent, mainly in Phuket, Krabi, Koh Samui and Pang Nga. However, the oversupply of the hotel rooms in Phuket will keep the occupancy rate level for this province.

Revenues of Hotels/Guest Houses by Type of Revenues, Size of Establishment and Region 2002

(In thousand U.S.$)

Region and type of revenues	Total		Size of Establishment (rooms)					
			Less than 60		60-149		Greater than 150	
	Amount	%	Amount	%	Amount	%	Amount	%
Whole Kingdom	1,110,244.3	100.0	53,354.7	100.0	149,342.0	100.0	907,547.6	100.0
Revenues from room sales	580,596.5	52.3	42,945.6	80.5	94,748.1	63.4	442,902.9	48.8
Revenues from restaurant/outlet	344,748.7	31.1	7,253.1	13.6	34,306.8	23.0	303,188.9	33.4
Revenues from function and meeting room sales	56,310.8	5.0	338.7	0.6	5,393.8	3.6	50,578.3	5.6
Other revenues	128,588.3	11.6	2,817.4	5.3	14,893.4	10.0	110,877.5	12.2
Bangkok	689,908.4	100.0	7,352.3	100.0	20,605.4	100.0	661,950.7	100.0
Revenues from room sales	317,300.7	45.9	6,543.3	89.0	15,304.5	74.3	295,453.0	44.6
Revenues from restaurant/outlet	243,403.2	35.3	576.0	7.8	3,268.2	15.9	239,559.0	36.2
Revenues from function and meeting room sales	41,509.4	6.0	-		427.0	2.1	41,082.4	6.2
Other revenues	87,695.1	12.8	233.0	3.2	1,605.8	7.7	85,856.3	13.0
Central Region	120,733.4	100.0	14,551.1	100.0	22,247.8	100.0	83,934.4	100.0
Revenues from room sales	71,784.0	59.5	12,071.0	83.0	14,547.2	65.4	45,165.8	53.8
Revenues from restaurant/outlet	31,176.4	25.8	1,372.7	9.5	5,672.4	25.5	24,131.3	28.8
Revenues from function and meeting room sales	5,029.3	4.2	32.0	0.2	1,132.5	5.1	3,864.8	4.6
Other revenues	12,743.7	10.5	1,075.4	7.3	895.7	4.0	10,772.6	12.8
Northern Region	109,711.6	100.0	10,243.9	100.0	22,944.0	100.0	76,523.7	100.0
Revenues from room sales	66,697.8	60.8	7,687.1	75.0	12,742.5	55.5	46,268.2	60.5
Revenues from restaurant/outlet	26,700.2	24.3	1,781.5	17.5	5,303.9	23.1	19,614.8	25.6
Revenues from function and meeting room sales	4,797.1	4.4	82.3	0.8	1,760.3	7.7	2,954.5	3.9
Other revenues	11,516.6	10.5	693.1	6.7	3,137.2	13.7	7,686.2	10.0
Northeastern Region	34,081.2	100.0	5,171.9	100.0	18,164.3	100.0	10,744.9	100.0
Revenues from room sales	19,799.8	58.1	4,422.6	85.5	10,036.0	55.3	5,341.2	49.7
Revenues from restaurant/outlet	7,856.4	23.1	346.1	6.7	4,180.2	23.0	3,330.2	31.0
Revenues from function and meeting room sales	2,424.5	7.1	71.8	7.2	1,307.2	7.2	1,045.4	9.7
Other revenues	4,000.5	11.7	331.5	5.9	2,640.9	14.5	1,028.1	9.6
Southern Region	155,809.8	100.0	16,035.4	100.0	2,811,362.4	100.0	74,393.8	100.0
Revenues from room sales	105,014.3	67.4	12,221.6	76.2	1,811,071.6	64.4	50,674.7	68.1
Revenues from restaurant/outlet	35,612.5	22.9	3,176.8	19.8	682,925.7	24.3	16,553.6	22.3
Revenues from function and meeting room sales	2,550.6	1.6	152.6	1.0	32,973.7	1.2	1,631.1	2.2
Other revenues	12,632.4	8.1	484.3	3	284,391.4	10.1	5,534.4	7.4

Source: National Statistical Office
Remark: Exchange Rate = Baht43.00/U.S.$1

With a number of leading international hotel chains entering the Thai market, such as Ritz Carton hotel, Raffles hotel, W brand hotel since mid 2003, existing hotels are readjusting their marketing strategies by focusing more on revenues received from food and beverage sales. Room revenues will be difficult to maintain due to the increase in hotel room rates, forecast to be approximately 20% higher than year 2003. For the 4-5 star hotels with 400 rooms or more, food and beverage sales accounts for about 40% of total revenues. It is estimated that the hotel food and beverage market will grow at least 8-12 percent in year 2004. It is noticeable that at present the 4-5 star hotels have tried to avoid rate-undercutting as they realized that it was not only negatively impact the return on investment but it also hurt their image. It is anticipated that, at least 5 billion baht ($125 million) will be invested by 4-5 star hotels, as most of them will be competing on the standard and quality of their recreational, meeting and dining rooms. The entire HRI sector sources about 30-35 percent of their food products via imports, with the remainder locally produced; the U.S. has approximately 20 percent of the imported product share. U.S. beef, fruits, lobster, fish, crab, seasonings, wine etc are well known in the hotel/restaurant trade and with airline catering companies.

Average no. of customers per day using the hotel's restaurant 2002

Region and size of establishment	Average number of customers per day	Thai		Foreigner	
		Number	%	Number	%
Whole Kingdom	104,574	45,671	43.7	58,903	56.3
Fewer than 60 rooms	13,492	6,504	4.2	6,988	51.8
60-149 rooms	18,950	11,274	59.5	7,676	40.5
Over 150 rooms	72,132	27,893	38.7	44,239	61.3
Bangkok	48,521	19,258	39.7	29,263	60.3
Fewer than 60 rooms	1,863	511	27.4	1,352	72.6
60-149 rooms	2,023	1,219	60.3	804	39.7
Over 150 rooms	44,635	17,528	39.3	27,107	60.7
Central Region	17,674	7,415	42	10,259	58
Fewer than 60 rooms	2,597	1,712	65.9	885	34.1
60-149 rooms	4,059	2,698	66.5	1,361	33.5
Over 150 rooms	11,018	3,005	27.3	8,013	72.7
Northern Region	12,424	6,058	48.8	6,366	51.2
Fewer than 60 rooms	2,280	1,092	47.9	1,188	52.1
60-149 rooms	3,338	2,010	60.2	1,328	39.8
Over 150 rooms	6,806	2,956	43.4	3,850	56.6
Northeastern Region	5,332	4,850	91	482	9
Fewer than 60 rooms	791	718	90.8	73	9.2
60-149 rooms	3,198	2,948	92.2	250	7.8
Over 150 rooms	1,343	1,184	88.2	159	11.8
Southern Region	20,623	8,090	39.2	12,533	60.8
Fewer than 60 rooms	5,961	2,471	41.5	3,490	58.5
60-149 rooms	6,332	2,399	37.9	3,933	62.1
Over 150 rooms	8,330	3,220	38.7	5,110	61.3

Source: National Statistical Office

Restaurant Industry

The restaurant industry in Thailand continues to show high growth throughout 2004 in line with the overall economic growth and the higher levels of Thai consumer confidence, which translates into increased spending on restaurants and other food services.

Restaurant Businesses in Thailand can be divided into three categories as follow:
1. Quick Service Restaurant It is estimated that the total market value for this business segment is estimated to be around U.S.$375-500 Million. The market is mainly dominated by the franchising businesses, which are chicken (40%), burger (20%), pizza (15%), ice cream (10%), and others (15%). The examples of QSRs currently operating in Thailand are KFC, McDonalds, the Pizza company, Pizza Hut, Burger King, Dairy Queen, A&W, Chester's Grill, Subway, etc. At present, the QSR sector in Thailand has encountered some effects from the consumer trend towards more healthy products as most Thai consumers perceive that fast food products contain less valuable nutrition than ordinary Thai food. In addition to this, the growth of the QSR restaurant segment has also been hindered by the expansion of local SMEs restaurants (see below) into hypermarkets and department stores.

Growth of the Thai Quick Serve Restaurant Market (2003-2005)

	2003	2004	2005
Restaurant Sales (Mil. U.S. Dollar)	5,750	6,095	6,461
QSR Market Size (Mil. U.S. Dollar)	338	371	408
QSR Market Share (%)	5.9	6.1	6.3

Source: Industry estimates

Comparative Market Share in the Thai QSR Market

(Revenue in Mil. U.S. Dollar)	2000 ($1=Baht40.16)		2001 ($1=Baht44.48)		2002 ($1=Baht42.96)	
	Revenue	(%)	Revenue	(%)	Revenue	(%)
Pizza	35	12.6	39	14.2	53	17.3
Chicken	117	42.1	112	40.7	117	38.2
Hamberger	49	17.6	50	18.2	52	17.0
Ice Cream	29	10.4	29	10.5	33	10.8
Other (incl. Sizzler)	48	17.3	45	16.4	51	16.7
Total Market	278	100.0	275	100.0	306	100.0

Source: Ministry of Commerce and industry estimates

2. International/High-end Restaurant The sector that occupies the highest growth in restaurant industry with the market value not less than U.S.$ 250 Million.

3. Small Restaurant (SMEs-Small Medium Enterprises) Most of new entrepreneurs who want to have their own restaurants will first enter into this market as SME-type restaurants due to the low initial investment required to start up this type of business. The industry estimates that the market size for this sector will be greater than U.S.$ 250 million in 2004.

Income and percentage of food consumption

	Units	1999	2000	2001	2002
Per capita income	**$/capita**	1,986	1,958	1,831	1,992
% of disposable income spent on food	**Percent**	33.3	32.2	33.9	33.6
% spent eating out	**Percent**	6.3	7.0	7.4	7.7

The increasing numbers of new restaurants and their popularity among consumers have taken market share from the hotels' F&B outlets. General restaurants have been replaced in the market by restaurant chains such as S&P, Black Canyon, MK Suki, Seefah restaurant, Oishi, Fuji, Zen, etc. Currently, Thailand possesses over 1,000 fast food branches nationwide (KFC has 395 outlets, McDonalds 100, MK Suki 164, The Pizza Company 156, Pizza Hut 143, S&P 50, S&P Bakery Shops 97, Chester's Grill 90, Burger King 16, Sizzler 23, Auntie Anne's 36, Swensen's 96, Dairy Queen 155). Fast food products are made available in an increasing number of outlets and have become more popular as nowadays most Thai consumers can purchase lunch boxes, burgers, hot and cold drinks and ready-to-eat foods in convenience stores or supermarkets near their workplace or home. Recently, the growth of fast food outlets has decreased, mainly due to the change in Thai consumers' eating habits to include more health and ethnic cuisine. Japanese foods are emerging as a popular type of foreign food in Thailand, while Japanese culture is widely appreciated and adopted among Thai teenagers. Since Thai consumers tended to eat less beef, many burger chains have diversified their menus to include chicken, fish, and vegetables to accommodate local tastes.

Catering Service Business

The Thai catering market has become increasingly concentrated and competitive among hotels and the restaurant sector. Catering businesses are ranged from small to large-scale businesses and are categorized into four categories: contract caterers (Compass Group, F&B International Co.), airline and exhibition caterers (Thai Airways International Plc., Siam Flight, Gate Gourmet (Thailand) Ltd., BITEC, Impact Arena), hotels and medium-high end restaurants, and local small caterers. It is estimated that there are more than 200 local caterers, which are managed by owner-proprietors and family members provide catering services focused only on clients in some particular geographic area and some special functions such as local wedding ceremonies, birthday parties, seminars, as on new house ceremonies, etc.

Some of the medium-sized catering services infrequently import directly, usually purchasing through recognized and established importers and distributors. The target groups of the contract catering services in Thailand are the customers at workplaces, ranging from employee restaurants to executive dining. These clients include local, national and international organizations; military services; hotels; hospitals; office buildings and airlines. Hospitals, office buildings, and large factories are providing more cafeterias or food court for their staff and customers. These contract-catering services use both local and imported food products, depending upon their customers' requirement. Approximately 10 percent of these menus use imported products such as french fries, beef, salmon, lamb, sauces and seasonings, cheese, fresh fruits, seafood, turkey, and a variety of beverages. For Thai Airways, which is a government enterprise, it has to comply with the government's objective of promoting Thai products. Thai Airways, Siam Flight and Gate Gourmet use approximately 20 percent of imported food for their airline catering service.

HRI Sector in Thailand

Name	Location	2002 F&B Sales (Thousand of U.S. Dollar)	% F&B Sales	No. of Rooms	No. of Restaurant Outlets
Bangkok Marriott Resort and Spa Hotel	Bangkok	n/a	n/a	413	7
Banyan Tree	Bangkok	n/a	40%	215	7
Dusit Thani Hotel	Bangkok	11,969	21%	501	14
Four Seasons Hotel	Bangkok	8,031	42%	340	10
Mae Rim Terrace Resort	Chiang Mai	1,718	21%	n/a	
Grand Hyatt Erawan Hotel	Bangkok	n/a	n/a	387	9
Imperial Queen's Park Hotel	Bangkok	13,855	25%	1287	9
JW Marriott Hotel	Bangkok	n/a	33%	441	6
Royal Orchid Sheraton Hotel	Bangkok	6,541	30%	740	7
Shangri-La Hotel	Bangkok	14,577	37%	n/a	9
Sofitel Central Plaza Hotel	Bangkok	n/a	60%	607	11
The Oriental Hotel	Bangkok	15,105	39%	393	9
Baan Rim Naam Chao Phraya Co., Ltd.	Bangkok	2,863	53%	n/a	n/a
Siam Flight Services Ltd.	Bangkok	130	100%	n/a	n/a
Banyan Tree Phuket	Phuket	4,050	24%	121	n/a
Dusit Laguna Resort	Phuket	2,848	31%	226	n/a
Laguna Beach Resort	Phuket	2,930	30%	252	n/a
Sheraton Grande Laguna Phuket	Phuket	5,432	36%	343	n/a
Thai Airway	Bangkok	38,259	100%	n/a	n/a
Safari World	Bangkok	1,703	18%	n/a	n/a
Phuket Fantacy	Phuket	5,084	25%	n/a	n/a
Catering Associate Limited	Bangkok	2,146	n/a	n/a	n/a
Select Services Partner Limited	Bangkok	4,611	n/a	n/a	n/a

SECTION II: MARKET OPPORTUNITIES

- Thailand, covering 198,114 square miles, is situated in the heart of Southeast Asia and is considered the gateway to Indochina. Thailand borders Laos in the north and northeast, Burma in the north and west, the Andaman Sea in the west, Cambodia and the Gulf of Thailand in the east, and Malaysia in the south. There is a population of 63.5 million at the end of 2002. Theravada Buddhism is the national religion and is actively practiced by about 95% of Thais, with the remainder practicing Islam, Christianity, Hinduism and other faiths. About 51.83 million Thais are over 13 years old and approximately, 31.14 million are male.
- The size of the work force now exceeds 34 million, with the majority of the workforce under 30 years of age.
- The minimum wage in Thailand is currently 169 baht per day (US$3.93) in Bangkok, and between 133-168 baht (US$3.10-3.91) per day in other provinces.

Minimum Daily Wage

Provinces	Baht/Day	$/Day
Phuket	168	3.91
Bangkok, Samut Prakarn, Pathum Thani, Nakhon Pathom, and Samut Sakhon	169	3.93
Nontaburi	167	3.89
Chonburi	150	3.49
Saraburi	148	3.45
Nakonratchasima	145	3.38
Chiang Mai, Phang Nga, and Ranong	143	3.33
Rayong	141	3.28

Phra Nakhon Si Ayutthaya	139	3.24
Krabi and Ang Thong	138	3.21
Chachoengsao, Lamphun and Sukhothai	137	3.19
Khon Kaen, Buriram and Phetchaburi	136	3.17
Kanchanaburi, Kalasin, Kamphaeng Phet, Chantaburi, Chumphon, Chainat, Trad, Nakhon Panom, Narathiwat, Prachin Buri, Phetchabun, Ratchaburi, Songkla, Singbusi, Surat Thani, Nong Bua Lumphu, and Uthai Thani	135	3.14
Nakhon Nayok	134	3.12
The rest of the country	133	3.10

Source: Bank of Thailand ($1 = 42.96 Baht)

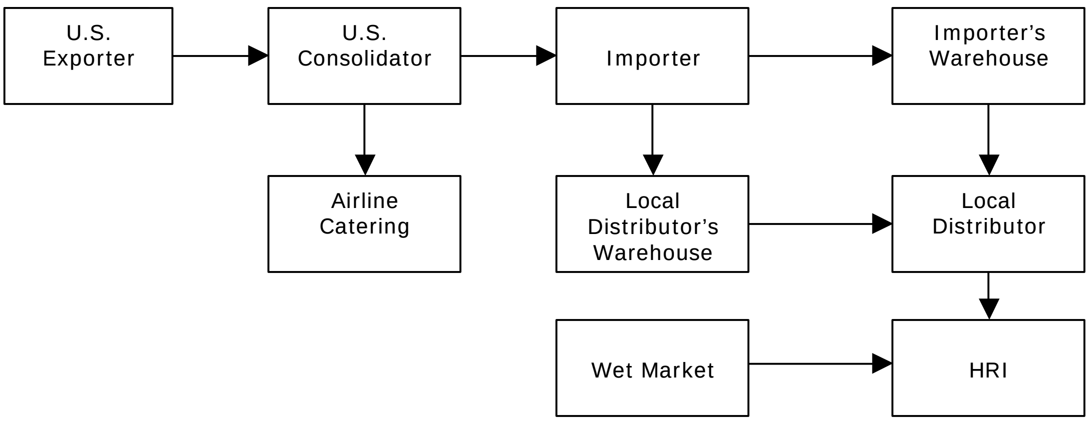
- Given the economic importance of the Thai restaurant, hotel and catering services sector, this sector represents a good potential for U.S. products.
- Literate population due to comprehensive schooling, increased overseas studies, international travel, access to internet and cable TV;
- Over 10 percent of total population lives in Bangkok, which accounts for 90 percent of the sales of fast moving consumer goods;
- Most of medium and high-income people live in the major cities, including Bangkok, Phuket, Chantaburi, Chiang Mai, Chiang Rai, Chonburi, Hat Yai, Khon Kaen, Nakorn Ratchasima, Pattaya, Petchaburi, Ratchaburi, Samui Island, Surat Thani, Ubon Ratchatahni and Udon Thani;
- A stable and stronger Baht in 2003 led to an increase in imported consumer-oriented food products from the U.S;
- Over the past few years, Thais living in urban areas are relatively brand conscious and their shopping behavior has moved away from the traditional open-air wet markets to modern supermarkets and shopping centers which offer them convenience and a wide selection of products in a modern experience;
- High growth in the number of hotels, resorts and other tourist accommodations continues to lead to an increase in the number of imported food items to support more tourists;
- Hotels and international restaurants play an important role in increasing consumer awareness about U.S. products, which may not be commonplace in the retail market e.g. certain types of seafood, etc.
- Changing eating habits of Thais are helping to grow the restaurant business in Thailand. Consumers are now eating out more frequently, whenever they want to.
- Upper and middle-income groups in Thailand like to spend money on food, especially during the holidays, and also for daily consumption. Consumption of imported food products peak during New Year, Christmas, Chinese New Year and the Thai New Year seasons as gifts of food are given, especially consumer products such as coffee, tea, milk, snack food, jelly, jam, crackers, nuts, fruit juice, wine, beer, whisky, health food and fresh fruit;
- Continuous increases in the number of health-conscious consumers is leading to higher demand for health and functional food and drinks;
- Thai consumers view U.S.-origin foods and beverages as high quality and consistent products, for instance: U.S. beef, french fries, dried and fresh fruit, nuts, fruit juice, jams, and other products are always rated by local consumers as the best in the world. However, this perspective does not apply to all U.S. products as some local consumers still prefer wine from France, for example.

Advantages and challenges facing US products in Thailand

Advantages	Challenges
- Many varieties of superior U.S. high quality agricultural products from fresh to processed food. - Excellent opportunities exist for U.S. products targeting niche markets	- U.S. exporters don't know much about the Thai market and at the same time severe competition from China, Australia, New Zealand, Japan and other neighboring countries impedes the entry of U.S. products
- Increase of per capita income from $1,831 in 2001 to $1,992 in 2002 - GDP for 2004 is projected at 8 percent - Increase in Thai consumers' preference for higher quality products	- U.S. products are not always price-competitive compared to imports from other Asian countries due to high tariffs, shipping costs and time to Thailand
	- The bilateral free trade agreement between Thailand and other countries, particularly China, Australia, and India, induces the import of more low-price products from these trade partners
- Local Thai consumers view US-origin products as high quality and safe and are confident in U.S. foods and beverages consistency	- Local manufacturers can improve or change quality of products, tastes or packaging sizes according to changes in consumer behavior and can lower production cost
- Eating style of Thai people is changing to include more imported food items	- Lack of continuous promotion of U.S. varieties in Thai market. Exporters need to support market promotion campaigns to attract and build new markets
- Increase in niche markets with higher incomes and high premium product preferences	- Market penetration for imported products is concentrated in Bangkok and major tourist-destination provinces
- The booming tourism industry is ratcheting up demand for HRI products, especially U.S. beef, turkey, seafood, wine and seasonings which can be used in American, French, Japanese and other international style restaurants	- 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 try to increase demands for Thai local products - Food Safety concerns
- A wide range of restaurants and menus to meet demands of tourists requires a wide variety of products	- Very high import tariffs on high value consumer food and beverage products, especially U.S. meat products, wine, whiskies, cherries, peaches, plums, pears, French fries, etc.
- Thai importers prefer to deal with reliable U.S. suppliers who are able to supply products at competitive prices	- Lack of trader and consumer awareness of U.S. products, while marketing costs to increase consumer awareness are high
- Thailand's beneficial geographical location is viewed as a gateway to the larger Indochina and other Asian markets	-Due to the high import tariffs on U.S. products, most Thai importers have shifted to import less expensive products from other Asian countries, especially Australia, China, Malaysia, Singapore, etc.

SECTION III: ROAD MAP FOR MARKET ENTRY

Direct contact with local food service importers is the best entry strategy for U.S. exporters. Hotels and resorts do not import food directly in volumes to be attractive to U.S. exporters. It is easier for hotels and resorts to order from food service importers because they specialize 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 the heavy users for U.S. products. International food restaurants located in the prime areas of Bangkok, Chiang Mai, Samui island, Phuket and Phi Phi island are secondary recommendations for U.S. exporters. Direct contact with catering services is highly recommended for first time market contact.



SECTION IV: BEST MARKET PROSPECTS

Best market prospects for U.S. suppliers include:

- Fresh and frozen seafood such as fish, crab, shrimp, crawfish (fresh and frozen), scallop, lobster, mussel, oyster, etc.
- U.S. beef, poultry, processed meats
- American spices, seasonings and sauces, jam and jelly, mayonnaise, Salsa sauces, nuts (walnuts, hazel nuts, macadamia nuts), dried fruits syrup, tortilla chips, and vinegar
- Baking products, flour, biscuits, ready-to-mix pancakes, cookies, muffins and cakes
- Breakfast cereals
- 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 products (cakes, peas, vegetables, fruits)
- Fruit juice
- Wine, liquor, whisky and beer

SECTION V: CONTACT INFORMATION

Hotels and Resorts

Bangkok Marriott Resort and Spa Hotel
257 Charoennakorn Road,
Bangkok 10600
Tel: 662-476-0022
Fax: 662-477-0811
www.marriotthotels.com/bkkth
Contact: Jonh Westoby, Director of Operations

Banyan Tree Bangkok
21/100 South Sathorn Road,
Sathorn, Bangkok 10120
Tel: 662-679-1200
Fax: 662-679-1188
www.banyantree.com
Contact: Scott Murray, Director of Food and Beverage

Conrad Hotel
All Seasons Place,
87 Wireless Road,
Bangkok 10330
Tel: 662 690 9999
Fax: 662 690 9000
www.conradhotels.com
Contact: Leon Dolle, Executive Assistant Manager

Dusit Thani Hotel
946 Rama IV Road,
Bangkok 10500
Tel: 662-236-9999
Fax: 662-236-6400
www.dusit.com
Contact: Frank Grassmann, Director of Food and Beverage

Four Seasons Hotel
155 Rajadamri Road,
Bangkok 10330
Tel: 662-250-1000
Fax: 662-253-9195
www.fourseasons.com/bangkok
Contact: Robert Logan, Director of Food and Beverage

Grand Hyatt Erawan Bangkok
494 Rajdamri Road,
Bangkok 10330
Tel: 662-254-1234
Fax: 662-254-6286
www.bangkok.hyatt.com
Contact: Chris Conway, Director of Food and Beverage

JW Marriott Hotel
4 Sukhumvit Road, Soi 2,
Bangkok 10110
Tel: 662-656-7707
Fax: 662-656-7711
www.marriott.com
Contact: Mr. Patrick Martinez, Acting F&B Director

Peninsula Hotel
333 Charoennakom Road
Klongsan Bangkok 10600
Tel: 662-861-2888
Fax: 662-861-1112
http://bangkok.peninsula.com
Contact: Eric Faivre, Director of Food and Beverage

Royal Orchid Sheraton Hotel
2 Captain Bush Lane, New Road,
Siphya, Bangkok 10500
Tel: 662-266-0123
Fax: 662-236-8320
Contact: Dario Orsini, Director of Food and Beverage

Shangri-La Hotel
89 Soi Wat Suan Plu,
New Road, Bangrak,
Bangkok 10500
Tel: 662-236-7777
Fax: 662-236-8579
www.shangri-la.com
Contact: Randel Linhart, Director of Food and Beverage

Sheraton Grande Sukhumvit Hotel
250 Sukhumvit Road
Bangkok 10110
Tel: 662-653-0333
Fax 662-653-0400
www.sheratongrandesukhumvit.com
Contact: Dennis J. Thouvard, Director of Food and Beverage

Sofitel Central Plaza Hotel
1695 Phaholyothin Rd,
Chatuchak, Bangkok 10900
Tel: 662-541-1234
Fax: 662-541 1087
www.centralhotelsresorts.com
Contact: Herve Duprat, Director of Food and Beverage

Sukhothai Hotel
13/3 South Sathorn Road,
Bangkok 10120,
Tel: 662-287-0222
Fax: 662-287-4980
www.sukhothai.com

Contact: Anne-Marie Houston, F&B Manager

The Oriental Hotel
The Oriental, Bangkok 48 Oriental Avenue,
Bangkok 10500
Tel: 662-659-9000
Fax: 662-659 0000
www.mandarin-oriental.com/bangkok
Contact: Eric Weber, F&B Manager

Restaurants

13 Coins Restaurant
13 Coins Towers Ltd.
525/3 Ratchadapisek Road,
Huaykwang, Bangkok 10310
Tel: 662-274-1219
Fax: 662-274-1218
Contact: Somchai Nitiwanakul, Managing Director

Bourbon St. Bar and Restaurant
Texxan Co., Ltd.
29/4-6 Behind Washington Theatre
Sukhumvit Soi 22,
Bangkok 10110
Tel: 662-259-0328/9
Fax: 662-259-4318
www.bourbonstbkk.com
Contact: Douglas B. Harrison, Managing Director

Hamilton's Steak House
Dusit Thani Hotel
946 Rama IV Road,
Bangkok 10500
Tel: 662-236-9999
Fax: 662-236-6400
Contact: Frank Grassmann, Director of Food and Beverage
Hard Rock Café
424/1, 424/3-6 Siam Square Soi 11
Pathumwan, Bangkok 10330
Tel: 662-251-0792/94
Fax: 662-254-0832
www.hardrockcafe.co.th
Contact: James Choong, General Manager

Outback Steakhouse
OBS Restaurant Thailand Limited.
2nd Floor Siam Discovery Centre
Rama 1 Road, Pathumwan
Bangkok 10330
Tel: 662-658-0202
Fax: 662-658-0204
Contact: Ajay Verma, Proprietor

Neil's Tavern Restaurant
58/4 Soi Ruam Rudee,
Wireless Road, Bangkok 10330
Tel: 662-256-6874-6
Fax: 662-650-9740
Contact: Pipat Pitsanusakorn, Managing Director

New York Steakhouse
2nd Floor, JW Marriott Hotel
4 Sukhumvit Road, Soi 2,
Bangkok 10110
Tel: 662-656-7707
Fax: 662-656-7711
Contact: Mr. Patrick Martinez, Acting F&B Director

Park Avenue Steak House
Panumas Marketing & Distribution Co., Ltd.
G/F, Mercury Tower,
540 Ploenchit Road,
Bangkok 10330
Tel: 662-658-7722/3
Fax: 662-658-7892
Contact: Panumas Pornvarakorn, Proprietor

Roses Are Red (Steak and Seafood Restaurant)
413/5 Sukhumvit Soi 55
(Between Thonglor 23-25) Bangkok
Tel: 662-392-1881-2
Fax: 662-392-4530
Contact: Triphong Kohengkul, Managing Director

S & P Syndicate Public Company Limited
457-457/6 Soi Sukhumvit 55 Vadhana
Bangkok 101110
Tel: 662-381-3412
Fax: 662-381-2790

Seafood Palace International (Seafood Market and Restaurant)
Euro Emporium Co., Ltd.
348 Sukhumvit Road., Asoke Sq.,
Bangkok 10110
Tel: 662-653-1145-8, 653-3900/5
Fax: 662-653-1149
Contact: Nucha Kathapithak, General Manager

Tony Roma's
Mas Millennium (Thailand) Ltd.
87 Sukhumvit Road, Ground Floor,
Nai Lert Building
Klongtoey, Wattana
Bangkok 10110
Tel: 662-254-2912
Fax: 662-254-1326

Contact: Raymond Chow, General Manager

Institutional/Catering Contacts

Compass Group Services Co., Ltd.
100/1 Vorasombat Building, 11, Rama 9 Rd.,
Huaykwang, Bangkok 10320
Tel: 662-247-5720-5
Fax: 662-247-5726
Contact: Buranapap Unsaen, Acting Purchasing Manager
Hugues Reveille, Managing Director

Thai Airways International Plc.
Bangkok International Airport,
Donmuang, Bangkok 10210
Tel: 662-697-1128
Fax: 662-504-4057
Contact: Suchada Tiyavanich, Duty Manager Procurement Section

Siam Flight Services Ltd.
Bangkok International Airport
Vipavadee-Rangsit Road,
Donmuang, Bangkok 10210
Tel: 662-996-8881 ext. 150
Fax: 662-996-8889
Contact: Charunan Ratana-arporn, Purchasing Manager

Gate Gourmet (Thailand) Ltd.
71 Chaengwattana Road,
Kwaeng Talad Bangkhen,
Khet Laksi, Bangkok 10210
Tel: 662-521-8200-5
Fax: 662-521-1164
Contact: Supachai Sornthong, Assistant Supply Manager

Impact Arena Exhibition and Convention Center Muang Thong Thani
99 Popular Road, T. Banmai,
A. Pakkred, Nonthaburi 11120
Food and Beverage Department
Tel: 662-504-5050
Fax: 662-504-4444
Contact: Chawanich Sirisinghol, Food and Beverage Director

Bangkok International Trade and Exhibition Centre
8 Bangna-Trad (Km.1),
Bangna, Bangkok 10260
Tel: 662-749-3939
Fax: 662-749-3959
Contact: Dana Caron, Food and Beverage Director

F&B International Co., Ltd.
Queen Sirikit National Convention Center
60 New Rachadapisek Road, Klongtoey,

Bangkok 10110
Tel: 662-229-3213
Fax: 662-229-3174
Contact: Pornchai Hoonsawadi, Acting General Manager
Anake Boontham, Food and Beverage Manager

Food Service Importers

Fine Food International Co., Ltd.
524/26 Soi 19 Rama 9 Road,
Huay Kwang, Bangkapi,
Bangkok 10310
Tel. 662-319-5274-5
Fax. 662-319-7352
E-mail: finefood@loxinfo.co.th
Contact: Pairat Rodjanaporn

Intermarco Co., Ltd.
50 Hajana Village
Srisena Rd., Phuket 83000
Tel. 66-076-253-024
Fax. 66-076-216-425
Contact: Ron Brandon, Managing Director

Pan food Co., Ltd.
3388/7 Sirirat Bldg. 2nd Floor,
Rama IV Rd., Klongton, Klong-Toey
Bangkok 10110
Tel. 662-671-5093, 672-7982
Fax. 662-671-8454
E-mail: panfood@hotmail.com
Contact: Vutikorn Daomanee, Managing Director

Siam Food Services
2439 Old Paknam Railway Rd.
Prakhanong, Klongtoey,
Bangkok 10110
Tel. 662-240-4000 ext. 101
Fax. 662-671-8591
Contact: Pieter Nuboer, CEO

Superior Quality Food Co., Ltd.
50 Soi Pattanakarn 20,
Suanluang, Suanluang District,
Bangkok 10250
Tel. 662-720-0641-3
Fax. 662-720-0644
E-mail: nittokai@hotmail.com
Contact: Supharat Laopranichon, Managing Director

Tohkaiya Company Limited
33/89-90 Moo 10, Thepharak Rd.,
K.M. 16, Bangplee,

Samutprakarn 10540
Tel. 662-312-1861-2, 752-5506-7
Fax. 662-750-7370
Contact: S.S. Loo, Managing Director

Beverage Importers

Ambrose Wine Limited
3/Flr., Bangkok Business Centre,
29 Sukhumvit 63 Road (Ekamai),
Klongton Nue, Wattana,
Bangkok 10110
Tel. 662-714-2531-40
Fax. 662-714-2545
E-mail: wisanp@ambrosewine.com
Contact: Mr. Wisan Pijibandan, Marketing Director

Bangkok Beer and Beverage Co., Ltd.
193/54 Lake Rajada Office Complex
14th Floor, Rajadapisek Road, Klongtoey,
Bangkok 10110
Tel. 662-661-9446-7
Fax. 662-661-9448
E-mail: pc@bbb.co.th
Contact: Mr. Pongchalerm Chalermsaphayakorn, Executive Director

Bangkok Liquor Co., Ltd.
3/1 Convent Road, Silom,
Bangkok 10500
Tel. 662-674-7901/2
Fax. 662-212-6890
E-mail: kiti@bangkokliquor.com
Contact: Mr. Kitti S.Chaikul

Berli Jucker Public Co., Ltd.
99 Soi Rubia, Sukhumvit 42 Road,
Phrakanong, Klongtoey,
Bangkok 10110
Tel. 662-367-1111
Fax. 662-712-2241
Email: bjcwine@berlijucker.co.th
Contact: Ms. Tassanee Luangpetchngam, Marketing Manager

Cannon Pacific Co., Ltd.
188/3 Soi Sukhumvit 63 (Ekamai),
Klongton Nua,
Bangkok 10110
Tel. 662-391-6318
Fax. 662-391-6320
Contact: Mr. Ekachai Mahaguna, Managing Director

Cititex Enterprises Co., Ltd.
40/29 Moo 5, Karnchanapisek Road,

Bangbon, Bangkok 10150
Tel. 662-895-1761
Fax. 662-895-3958
Contact: Mr. Sithisak Chatamornwong, Managing Director

California Wine Co., Ltd, The
498-504 Sukhumvit 22, Besides Washington Theatre,
Sukhumvit Road, Klongton,
Bangkok 10110
Tel. 662-260-5794-5
Fax. 662-260-5807
Contact: Mr. Sorasit Wongsantivanich, General Manager

Diethelm & Co., Ltd.
2439 Old Paknam Railway Road,
Klongton, Klongtoey,
Bangkok 10110
Tel. 662-672-5535-39 Ext 101
Fax. 662-672-2569
E-mail: kritkasp@spd.diethelm.co.th
Contact: Mr. Kritkasem Panyarachun, Sales & Marketing Manager, Food/Special Products Div.

Italthai Industrial Co., Ltd.
2 Soi Soonvijai 3, New Petchburi Road,
Bangkapi, Huaykwang,
Bangkok 10320
Tel. 662-318-1617-22
Fax. 662-314-1809
E-mail: erik@italthaicellar.com
Contact: Mr. Erik Cornetet, Deputy Group Manager

Nicolas B.C. Co., Ltd.
36/9-10 Chaengwattana Road,
Thungsonghong, Laksi,
Bangkok 10210
Tel. 662-982-7178
Fax. 662-982-7760
Contact: Mr. Jajarindr Saochin, Managing Director

Splendid Surplus Co., Ltd.
27/17-18 Petchkasem Road,
Nongkhaem, Luksong,
Bangkok 10160
Tel. 662-807-4074
Fax. 662-807-4073
Contact: Mr. Thanis Potchapornkul, Managing Director

Vanichwathana (Bangkok) Co.,Ltd.
41 Anuwong Road,
Bangkok 10100
Tel. 662-222-2450
Fax. 662-224-8042
Mr. Vichai Kanchanasevee, Assistant Managing Director

V&K Inter Group Company
140/1 Soi Sukhumvit 4,
Sukhumvit Road, Klogntoey,
Bangkok 10110
Tel. 662-656-8030/5
Fax. 662-656-8182/3
Contact: Mr. Dominique Forey, Managing Director
Mr. Kittipong Dechaampai, Managing Director

Wine Gallery
9/8 Sukhumvit Soi 44,
Klongton, Klongtoey,
Bangkok 10110
Tel. 662-261-4602
Fax. 662-261-4536
Contact: Ms. Wantana Loakulrak, General Manager

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 comments regarding this report should be directed to the Foreign Agricultural Service in Bangkok at the following local or U.S. mailing address:

Local:	U.S. Mail:
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End of Report.