Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Scheduled Report - public distribution

Date: 8/6/1999

GAIN Report #TH9070

Thailand

Market Development Reports

Retail Food Sector Report

1999

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Report Highlights:
Agent/distributors remain the key to developing exports of U.S. consumer-ready foods to Thailand. The Trend of mergers with foreign supermarket chains is increasing and these mergers have come an increased willingness to provide shelf space for imported products.

Includes PSD changes: No

SECTION I. Market Summary

The Thai retail food market has been completely transformed over the last two years by significant European investment. There are approximately five hundred supermarkets in Thailand. The difference between the supermarkets, superstores, hypermarkets and cash-and-carry type stores in Thailand is their respective size and method of purchasing.

The largest chain of cash-and-carry stores, supercenters, supermarkets and hypermarkets in terms of dollar sales value are SHV Makro, Big C supercenter, Tops supermarket and Carrefour hypermarket respectively. At present, supermarkets, superstores, hypermarkets and cash-and-carry stores generate more sales than convenience stores, gas marts or kiosks especially for snack foods. The overall retail food sector's growth as depicted in the table below was negative in 1997 and 1998 in dollar terms, as the Thai Baht depreciated sharply against the dollar during the period. However, the actual growth rate in Thai Baht has increased between seven to eight percent during the worst years of 1997 and 1998. Thailand has been hit with economic recession during the past two years. The economy has started to pick up in 1999 as the Thai government helped stimulate the economy by lowering deposit and lending rates and decreasing value added tax (VAT) from 10 percent to seven percent in order to increase consumer purchasing power. For these reasons Thais, resident expatriates and tourists in all major cities have turned to shop more at supermarkets, superstores, hypermarkets and cash and carry stores rather than at traditional wet markets. Consumers have begun to realize they can get better value with similar quality from supermarkets, superstores, hypermarkets and cash and carry stores. About 15-30 percent of imported foodstuffs are sold through this segment.

Convenience stores, gas marts and kiosks are also highly popular for consumers aged between 18-35 years. The largest convenience store in terms of dollar sales value is CP 7-Eleven. The target customers of convenience stores are middle to lower middle income groups and travellers. The purchasing decisions of the target group are based on the convenience factor and low price. Very few imported foodstuffs are sold in this segment. In their place, locally produced U.S. branded snack foods and U.S. and Japanese style snack foods (potato chips, dried cuttlefish) are the best selling items in this sector.

Wet markets used to be popular for local people in major cities. They remain a major and essential part of the Thai retail food sector for staple foods. Presently, urban wet markets cannot compete with supermarkets, superstores and hypermarkets because bigger stores provide lower prices. In addition, the Thai FDA has been more active in it's health inspection regimes. Nevertheless, traditional 'Mom and Pop' grocery stores and wet markets will still exist in residential areas, as 55 percent of the Thai population is considered 'poor' with a relatively low educational background.

We assess that supermarkets, superstores and hypermarkets are the best method of entry for U.S. exporters to take to enter Thailand's retail food market. Large convenience store chains like CP 7-Eleven are recommended for selected foodstuffs. U.S. exporters can contact the chain directly or through importers/distributors of food products. The main factors U.S. exporters should consider for U.S. food products are pricing, shelf life of the product and customer preference. The traditional 'Mom and Pop' store 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 consider 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 base.

Table Of Overall Retail Food Sales Over The Past Five Years

USD million

Description	1994	1995	1996	1997	1998
Total overall retail food sales	15,829 (100%)	18,449 (100%)	20,508 (100%)	17,799 (100%)	14,559 (100%)
Growth rate		14%	10%	-13.21%	-18.20%
Supermarkets, Superstores, Hypermarkets, Cash-and-Carry stores	3,357 (21%)	3,912 (21%)	4,349 (21%)	3,775 (21%)	3,087 (21%)
Convenience Stores, Gas Marts, Kiosks	546 (4%)	637 (4%)	708 (4%)	614 (4%)	503 (4%)
Traditional Markets	11,926 (75%)	13,900 (75%)	15,451 (75%)	13,410 (75%)	10,969 (75%)

Sources: Bank of Thailand, Bangkok Bank, Thai Farmers Bank, Bangkok Post, The Nation, Pacrim interviews and Pacrim retail surveys

The expected growth rate of the overall food retail market (in Thai currency) is seven to 15 percent this year. The supermarket, superstore and hypermarket sector is expected to grow 15 percent this year, while the convenience store, gas mart and kiosk sector is expected to grow 12 percent. The traditional wet markets in Bangkok will grow around seven percent, whilst wet markets in urban and rural areas in the provinces will grow at more than 10 percent, given the absence of supermarkets, superstores and hypermarkets. The retail food segment grows at a faster paste than the country's economy as most of the major retail food outlets have been taken over by international companies on the expansion path.

Table Of Imported Versus Domestic Food Products Over The Past Five Years

USD million

Description	1994	1995	1996	1997	1998
Total value of domestic food products	20,468	23,802	26,446	23,019	18,981
Total value of imported food	1,215 (@ 25 Baht)	1,471 (@ 25 Baht)	1,647 (@ 26 Baht)	1,363 (@ 32 Baht)	963 (@ 42 Baht)
Total food and beverage consumption	21,683	25,273	28,093	24,382	19,944

Sources: Bank of Thailand, NESDB and Thai Customs Department

Large supermarkets, superstores and hypermarkets are opening their own logistic companys to serve their delivery needs nation-wide. This trend of stream-lining the distribution channel will hasten delivery from suppliers to retail outlets.

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, book stores, a photographic store and restaurants.

Advantages and Challenges

Advantages	Challenges
Of 62 million Thai consumers, about ten percent can afford imported foodstuffs and are aware of U.S. brands, taste profiles and quality.	Depreciation of the Thai Baht and other regional currencies has increased the retail price of U.S. food products more than that of imported foods from other countries.
Thais view U.S. products as being of high quality and safe.	Local manufacturers can improve or change quality of products, tastes or packaging sizes according to changes in consumer behaviour and can lower production cost.
The growing retail industry is looking for new imported food products.	Lack of importer and retailer knowledge and training in purchasing and handling of U.S. food products.
High quality U.S. style foodstuffs are not presently produced in Thailand.	Thai people prefer to buy good quality food, but are price conscious.
Vast varieties of high quality U.S. products.	Negative perception of Thai NGOs against U.S. biotechnology and genetically engineered seeds.
Niche market with high profit and super premium price.	The difference in Thai taste preference. Only certain groups of people are U.S. brand consumers.
Thai life style in Bangkok and major cities has become less focussed on a traditional diet.	More varieties of imported foodstuffs from other countries and greater competition from third country suppliers.
WTO and AFTA members may agree to reduce import tax for agricultural products	Current import tax and tariff rate for agriculture products are more than 30

to 15 percent.	percent on average.

SECTION II. Road Map For Market Entry

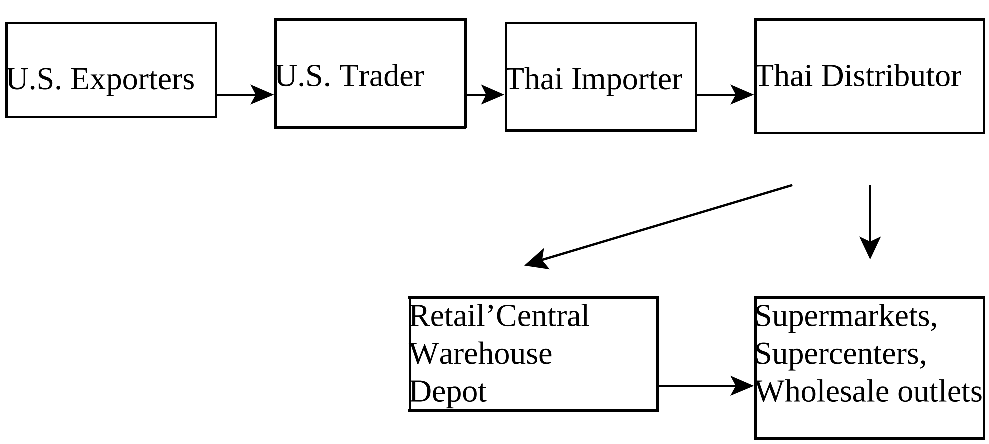
A. Supermarkets, Superstores, Hypermarkets, Supercenters, Cash-and-Carry Outlets

Entry Strategy

The best way for U.S. exporters to sell to Thai supermarkets, superstores, hypermarkets or supercenters is to directly contact importers and distributors. U.S. exporters should be aware that many multi-national retailers in Thailand charge listing fees or a listing allowance for new products. The fee will be charged in accordance with a formula based on the number of retail outlets and SKU (stock keeping unit). Currently, several international players have recently expanded their presence in the local retail market, including Auchan of France, CRC Ahold of the Netherlands, the Belgian Delhaize Le Lion supermarket group, Tesco of the UK, Carrefour Group of France and the Casino Group of France.

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.



The above diagram is indicative and varies between chain. Besides the above distribution channel, the principal and manufacturer can also deliver food products directly to their distributor.

Company Profiles

Retailer Name And Outlet Type	**Ownership (Legal Entity)**	**Food Sales ($Mil)**	**No. of Outlets**	**Locations (city/region)**	**Purchasing Agent Type**
SHV Makro, Cash-and-carry	The Netherlands	520 (1998)	17	Bangkok and major cities	Importer Distributor Manufacturer
Big C, Supercenter (Casino Group)	France	373 (1998)	20	Bangkok and major cities	Importer Direct Distributor Manufacturer
Lotus, Supercenter (Tesco Group)	UK	259 (1998)	14	Bangkok and major cities	Importer Direct Distributor Manufacturer
Tops, Supermarket (CRC Ahold)	The Netherlands	216 (1998)	40	Bangkok and major cities	Importer Distributor Manufacturer
Carrefour, Hypermarket	France	162 (1998)	7	Bangkok, Chiang Mai	Importer Direct Distributor Manufacturer
The Mall, Supermarket	Thai	121 (1998)	7	Bangkok	Importer Distributor Manufacturer

Siam Jusco, Supermarket	Japan	84 (1998)	14	Bangkok	Importer Direct Distributor Manufacturer
Emporium, Supermarket	Thai	78 (1998)	1	Bangkok	Importer Distributor Manufacturer
Foodland, Supermarket	Thai	65 (1998)	7	Bangkok, Pattaya	Importer Distributor Manufacturer
Tang Hua Seng, Supermarket	Thai	39 (1998)	5	Bangkok	Importer Distributor Manufacturer
Sunny's, Supermarket (Food Lion)	Belgium	30 (1998)	Five and three franchises	Bangkok	Importer Distributor Manufacturer
Isetan, Supermarket	Japan	30 (1998)	1	Bangkok	Importer Direct Distributor Manufacturer
Auchan, Hypermarket	France	23 (1998)	1	Chiang Mai	Importer Direct Distributor Manufacturer
Food Lion,	Belgium	18	5	Bangkok	Importer

Supermarket (Delhaize Le Lion)		(1998)			Distributor Manufacturer
UFM Fuji, Supermarket	Thai	15 (1998)	2	Bangkok	Importer Distributor Manufacturer
Villa, Supermarket	Thai	13 (1998)	Six and one franchise	Bangkok	Importer Distributor Manufacturer
Marks & Spencer, Supermarket	Thai	1 (1998)	7	Bangkok	Importer Direct Distributor
Others	Thai	1,040 (1998)	337	Bangkok and all cities nationwide	Distributor Manufacturer

Sources: Pacrim interviews with company management

In the Thai retail food sector, Siam Makro is the leading wholesaler. Tops is the leading supermarket chain, with other major players including the Mall, Siam Jusco, Emporium, Foodland, Tang Hua Seng, Sunny, Food Lion and Villa. Big C was acquired by the French Casino retail group and has become a leader in the supercenter or hypermarket segement with Lotus, Carrefour and Auchan.

Siam Makro currently has 17 outlets located in Bangkok and major cities. It reported a 1.4 percent increase in net consolidated profit in the first quarter of 1999 to four million dollars despite the decrease in consolidated sales by 1.5 percent to 205 million dollars. Siam Makro was satisfied with this result given that overall sales in the retail sector declined by seven percent for the period excluding food items. The key to success for the company is a commitment to sell quality food and non-food items under one roof in high volume and at the lowest possible prices.

29 Tops supermarket outlets are located in the prime areas of Bangkok whilst a further 11 of them are located in major cities in Thailand. Tops uses Excel Logistics (a related company) to handle all of its logistics and warehousing within Thailand. The operating capacity of Tops distribution centre is 68,000 cases of products annually. It currently stores between 5,500 and 6,000 product lines from 140 suppliers, with an average stock turnaround of 10

days. Fast-moving items are cleared in three days and slow-moving products in 20. Delivery of food products is made within 24 hours nation-wide. 500 suppliers deliver products to the centre in which 300 supply fresh fruits, vegetables, live seafood, meat, poultry and other food categories. Tops processes its own fresh food and ready-to-cook products in order to reduce cost, speed up delivery and minimise labour and inventory costs.

Big C hypermarket will expand 10 more outlets from its present 20 outlets this year after the complete acquisition by Casino. Eight outlets of Big C are located in Bangkok in residential and office areas whilst 12 outlets are located in major urban areas such as Pattaya, Nakorn Pathom, Udon Thani, Khon Kaen, Korat, Surat Thani, Pitsanulok, Rayong, Chiang Rai, Lampang, Lopburi and Petchburi. Casino will send French specialists to be responsible for logistics, fresh food, information technology, financial control, purchasing, engineering and non-food divisions in Big C. Currently, Big C uses 'Davison' as their logistic company. One of its specialties is private labelling, which it has developed for some time to build brand awareness. The development of information systems is expected to help Big C optimise the flow of goods between suppliers' warehouses and retail stores.

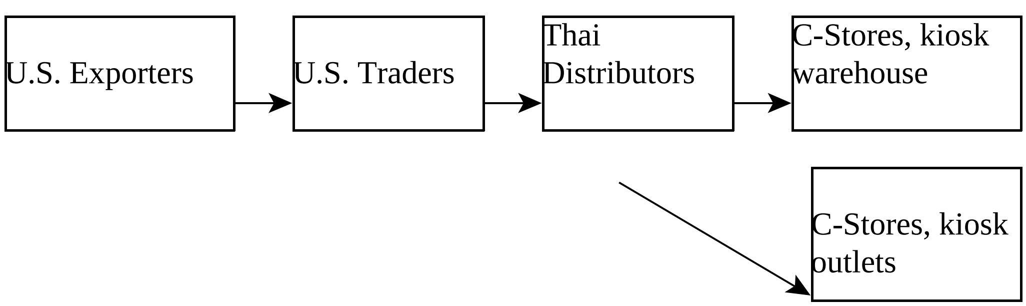
The sales of imported food increased between 1994-1996 and later declined in term of dollar value in 1997 and 1998 owing to devaluation of the Thai Baht. Food imports into Thailand are expected to increase according to demand of knowledgeable consumers about U.S. products. High import taxes are one of the government instruments for protecting local manufacturers. According to the government stimulus plan, the import tax for agricultural products is expected to decrease to 15 percent by 2000 if AFTA members agree.

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.

Distribution Channels



The above diagram is indicative and varies between chain. 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 dairy products. The flow pattern of different retailers varies depending on the sales volume and number of outlets. A key ingredient in the success of the larger retailers is the control of their own distribution centre.

Company Profiles

Retailer Name and Market Type	**Ownership (Legal Entity)**	**Food Sales ($Mil)**	**No. of Outlets**	**Location (City/ region)**	**Purchasing Agent Type**
CP 7-Eleven, Convenience	Thai	278 (1998)	1,104	Bangkok, all major cities	Distributor Manufacturer
AM/PM, Convenience	Thai	19 (1998)	280	Bangkok, major cities and national highways	Distributor Manufacturer
Siam Familymart, Convenience	Japan	10 (1998)	83	Bangkok	Wholesale Distributor Manufacturer
Star Mart, Convenience (Caltex)	USA	8 (1998)	300	Bangkok, major cities and national highways	Distributor Manufacturer
Lemon Farm,	Thai	7.2	7	Bangkok,	Direct

Convenience		(1998)		Phitsanulok, Phetchaburi, Songkla	Distributor Manufacturer
Tiger Mart, Convenience (Esso)	Thai	5.6 (1998)	300	Bangkok, major cities and main highways	Distributor Manufacturer
KFC, kiosk	Thai	3 (1998)	15	Bangkok and main highways	Distributor
Select, Convenience (Shell)	Thai	2.4 (1998)	107	Bangkok, major cities and main highways	Distributor Manufacturer
Q8 Shop, Convenience	Thai	2 (1998)	84	Bangkok, major cities and main highways	Distributor Manufacturer
Lemon Green, Convenience	Thai	1.8 (1998)	120	Bangkok, major cities, main highways	Distributor Manufacturer
PTT mart, gas mart	Thai	1.6 (1998)	115	Bangkok, major cities and main highways	Distributor Manufacturer
S & P Jet mart, kiosk	Thai	0.37	2	Bangkok	Distributor

	(S&P and Conoco)	(1998)			
Delifrance, kiosk	France and Thai	0.19 (1998)	One (20 this year)	Bangkok	Importer Distributor
Others	Thai	164 (1998)	860	Bangkok and all cities	Distributors Manufacturer

Sources: Pacrim interviews with company management

Most of the gas stations in Thailand also operate convenience stores or gas marts. Some of the gas stations have turned into giant food courts or food plazas for travellers along the main highways of Thailand. Even in Bangkok, the number of convenience stores and kiosks at gas stations will be increased rapidly this year.

Most food products sold in convenience stores in Thailand are locally produced, with liquor a notable exception. The target group of customers are lower middle income customers.

U.S. branded food products sold in these C-stores are generally produced in Thailand or in neighbouring Southeast Asian countries. This group of products include snack foods, chocolates, cookies, candies, gums and breakfast cereal. Distributors import U.S. branded food products 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.

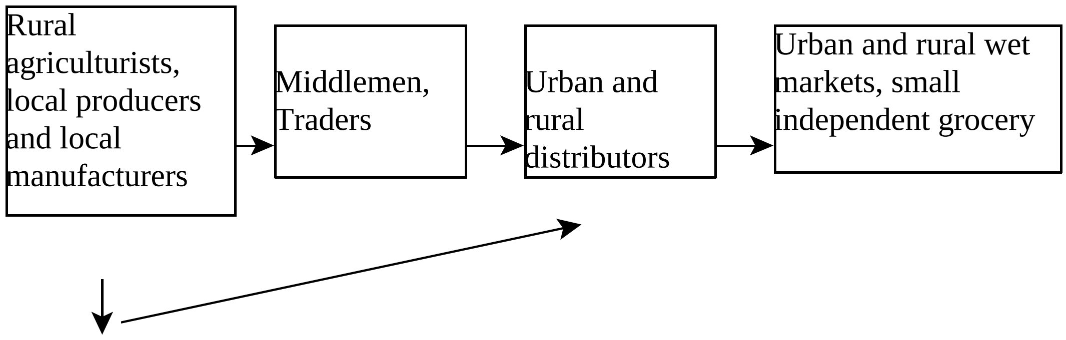
C. Traditional Markets

'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 foods.

Distribution Channels



The above distribution diagram is indicative of a standard distribution pattern for agricultural and food products in Thailand to urban and rural wet markets and small independent grocery stores. 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.

Sub-Sector Profile

Traditional Market	Ownership	Food Sales ($ Mil) (1998)	Number Of stores	Location	Purchasing Agent Type
'Mom & Pop'	Local	4,378	300,000	Bangkok and all cities, provincial and district capitals, and villages	Distributor Manufacturer

Wet Market	Local	6,591	600,000	Bangkok and all cities, provincial and district capitals, and villages	Distributor Producer

Sources: Pacrim interviews and Pacrim retail surveys

Thailand has been an agricultural based country for centuries. The present population is 62 million. Even though a small but influential percentage of the population have been exposed to western concepts and systems, a large proportion of the total population are considered poor with a low level of education. The traditional wet markets and 'Mom and Pop' independent grocery stores will still exist in residential areas throughout the country. The existence of wet markets in urban areas will eventually decline due to the expansion of the supermarkets, superstores, hypermarkets, convenience stores and kiosks. Whilst the number of stores and wet markets in rural areas increases along with the number of local households, the market for imported food in this sector is not likely to exist as consumers in this sector lack purchasing power and exposure to non-traditional foods. Consumers in major cities and urban areas will continue to have more purchasing power and will turn to shop at supermarkets, superstores, hypermarkets, convenience stores and kiosks rather than at traditional stores and wet markets.

SECTION III. Competition

Current Situation in the Thai market.

Domestic products have played a major role in the Thai market because the cost is perceived to be cheaper than imported foodstuffs. However, imported foods do relatively well in Bangkok (especially at locations near higher income families, resident expatriates and tourists) and other major cities such as Chiang Mai, Pattaya, Surat Thani, Had Yai, Petchburi, Ratchaburi, Phuket and Samui island. The ratio of imported food versus domestic food is 30:70. The United States holds approximately 10-15 percent of the overall imported foods market.

Imports of U.S. branded products have decreased over time because U.S. investors have shifted manufacturing bases from the United States to Thailand or neighbouring countries such as Australia, Indonesia and Malaysia. The advantages of AFTA, lower labour costs and the relative value of regional currencies versus the U.S. dollar has made these companies more competitive in Thailand. In addition, lower production and transportation costs have made these U.S. branded products more competitive in Thailand.

The advantage of imported foodstuffs versus locally produced food is that these products could not currently be produced or manufactured in Thailand and the quality is perceived as better than local products. The obvious disadvantage is the price of imported food. Local manufacturers understand local customers' needs and can improve or change quality of product, taste or packaging size to suit customer preference.

The advantage of U.S. products versus other foreign products is the fact that several high quality products could not be produced or manufactured in other foreign countries. The disadvantages would be the pricing, delivery time and customer preference.

SECTION IV. Best Product Prospects

A. Products That Are Present in the Market.

Product Categories

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, 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.

B. Products Not Present in Market in Significant Quantities but Which Have Good Sales Potential.

American seafood like 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.

C. Products That Will Not Do Well or Cannot Be Used in the Market.

None.

SECTION V. Post Contact and Further Information

Siam Makro Company Limited
3498 2nd Fl., Lard Prao Rd
Klongchan, Bangkapi
Bangkok 10240, Thailand
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Contact person: Mr Philip Cox, Food Director

Big C Supercenter Co., Ltd
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Lumpini, Pathumwan
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Fax. (662) 655-5801-2
Contact person: Mr Preecha Ekkunagul, Managing Director

Ek-chai distribution System Co., Ltd (Lotus Supercenter)
Modernform Tower
1000 Moo 16
Srinakrarin Rd, Suanluang
Bangkok 10250, Thailand
Tel. (662) 722-9640
Fax. (662) 722-9637
Contact person: Mr Mike Raycraft, CEO

CRC Ahold Co., Ltd (Top Supermarket)
139 Ratchadapisek Rd
Dindaeng, Huaykwang
Bangkok 10320, Thailand
Tel. (662) 937-1700 extension 302
Fax. (662) 937-1711
Contact person: Mr Douglas Brown, AVP/Buying & Merchandising-Grogeries

Cen Car Ltd (Carrefour Merchandise)

4th Fl Pong-Amorn Bldg
1028/5 Rama 4 Rd
Thungmahamek, Sathorn
Bangkok 10120, Thailand
Tel. (662) 748-7541-7
Fax. (662) 748-7433
Contact person: Mr Jack Hoareau, Fresh Division Head

The Mall Group (The Mall)
1988/2 Ramkhamhaeng Road
Huamark, Bangkapi
Bangkok 10240, Thailand
Tel. (662) 310-1000 / 318-8925
Fax. (662) 315-6605 / 318-8923
Contact person: Mr Surat Ampooch, President

Siam Jusco / Max Valu
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Dindaeng, Bangkok 10320, Thailand
Tel. (662) 641-2785-7 / 642-2401-8
Fax. (662) 641-2776-7
Contact person: Mr Teruo Hiranaka, Managing Director

The City Mall Group Limited (Emporium)
622 Sukhumvit Rd
Klongton, Klongtoey
Bangkok 10110, Thailand
Tel. (662) 310-1386
Fax. (662) 719-9462
Contact person: Mr Apichat Asawapokee, Senior Director

Foodland Supermarket Co., Ltd
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Wangthonglarng, Bangkok 10310, Thailand
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Contact person: Mr Supamit Surongsain, Asst. Vice President Marketing
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Fax. (662) 434-6057
Contact person: Mr Viroj Chunprathipthong, Managing Director

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Tel. (662) 721-5580-98 extension 1136
Fax. (662) 721-3399
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Fax. (662) 255-9808
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Fax. (662) 258-0697

Contact person: Mrs Sudawan Tangtrongsakdi, Managing Director

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Contact person: Mr Surapong Poosanakhom, Managing Director

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9th Fl, Soi Somkid
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Bangkok 10330, Thailand
Tel. (662) 254-0860-3
Fax. (662) 256-0283 / 256-0290
Contact person: Mr Paul Elliott, Managing Director

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313 CP Tower, 29th Fl
Silom Rd, Bangkok 10500, Thailand
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Fax. (662) 631-1446
Contact person: Mr Piyawat Thitasathavorakul, Managing Director

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12A, 14-16th Floor, Chai Building No. 333/3
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Contact person: Mr Ronnapop Ratanodaya, Managing Director

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139 Robinson Building
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Fax. (662) 641-3873

Contact person: Mr Minoru Endo, Managing Director