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Thailand

Retail Food Sector

2000

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Report Highlights:
Overseas retail operators have strengthened their control of the Thai retail market in 1999 and 2000. Although the overall Thai economy has not fully recovered in all sectors, the retail food sector growth has changed from an 18.2 percent contraction in 1998 to 1.6 percent growth in 1999, and this pace of growth is expected to continue. Agent/distributors remain the key to developing exports of consumer-ready foods to Thailand.

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

Section I. Market Summary

Overseas retail operators have strengthened their control of the Thai retail market in 1999 and 2000. There are approximately five hundred supermarkets in Thailand. The difference between 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. These operators have expanded aggressively in 1999-2000. Since 1999, Tesco-Lotus opened six new discount stores, Carrefour four stores and Makro two stores. A new Big C Supercentre will be opened in the last quarter of 2000. Improved consumer spending was a factor that encouraged discount stores to expand.

The overall retail food sector growth as depicted in the table below has shown a change from an 18.2 percent contraction in 1998 to 1.6 percent growth in 1999. Although the overall economy in Thailand has not recovered in all sectors, the retail food industry is an exception. High oil prices, negative consumer sentiment stemming from slow economic recovery, uncertainties of the Baht's value against the U.S. dollar have constrained the level of growth. Consumers have adjusted their behaviour in terms of the way they use cars to reduce fuel consumption. Such saving habits have been adopted to cope with the higher cost of living. 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	1995	1996	1997	1998	1999
Total overall retail food sales	18,449 (100%)	20,508 (100%)	17,799 (100%)	14,559 (100%)	14,792 (100%)
Growth rate	14%	10%	-13.21%	-18.20%	1.6%
Supermarkets, Superstores, Hypermarkets, Cash-and-Carry stores	3,912 (21%)	4,349 (21%)	3,775 (21%)	3,087 (21%)	4,882 (40%)
Convenience Stores, Gas Marts, Kiosks	637 (4%)	708 (4%)	614 (4%)	503 (4%)	1,035 (10%)
Traditional Markets	13,900 (75%)	15,451 (75%)	13,410 (75%)	10,969 (75%)	8,875 (50%)

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

The expected growth rate of the overall food retail market (in Thai currency) is five percent this year. The supermarket, superstore and hypermarket sector is expected to grow 15 percent in non-food products and 30 percent in food products this year, while the convenience store, gas mart and kiosk sector is expected to grow five percent. The traditional wet markets in Bangkok will grow less than one percent, whilst wet markets in urban and rural areas in the provinces will grow less than five percent, given the absence of supermarkets, superstores and hypermarkets.

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

USD million

Description	1995	1996	1997	1998	1999
Total value of domestic food products	23,802	26,446	23,019	18,981	36,043
Total value of imported food	1,471 (@ 25 Baht)	1,647 (@ 26 Baht)	1,363 (@ 32 Baht)	963 (@ 42 Baht)	2,233 (@ 38 Baht)
Total food and beverage consumption	25,273	28,093	24,382	19,944	38,276

Note: There has been an increase in the amount of Thai food exports during the period. Sources: Bank of Thailand, NESDB and Thai Customs Department

Large supermarkets, superstores and hypermarkets are opening their own logistic companies to serve their delivery needs nation-wide. This trend of stream-lining distribution channels will speed up delivery from suppliers to retail outlets. For example, Tesco-Lotus operates a distribution centre currently covering 50,000 square metres and is the sole supplier for 24 Tesco stores, and 876 local vendors and 39 multinational vendors in Thailand. It is developing a direct supply-chain network between Thailand and the UK which expects to start operating in two years.

Most of the supermarkets, superstores and hypermarkets in Thailand have their own food brands for ready-to-eat food, ready-to-cook prepared foods, home-made bakery items, TV dinners, sausages, water, cooking oil, rice, sauces, cereals, dairy products and fruit juice. These outlets also provide space for fast food outlets, kiosks, a laundry, a florist, bookstores, a photographic store, movie rental stores and restaurants.

Advantages and Challenges

Advantages	Challenges
Of 63 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, other regional currencies and high oil prices 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.

Section II. Road Map For Market Entry

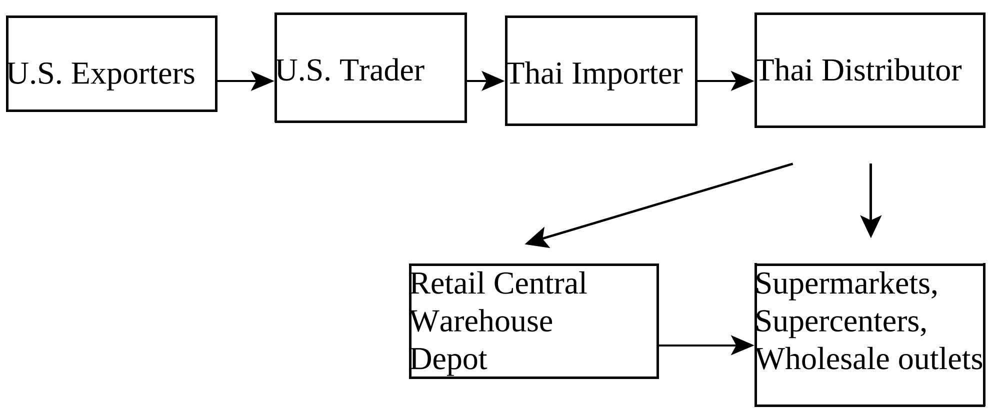
A. Supermarkets, Superstores, Hypermarkets, Supercenters, Cash-and-Carry Outlets

Entry Strategy

The best way for U.S. exporters to sell to Thai supermarkets, superstores, hypermarkets or supercenters is to directly contact supermarkets, superstores, hypermarkets, supercenters and cash-and-carry who import direct, 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. Some supermarkets, superstores and hypermarkets operated by multinational operators import food products directly and keep them at their own delivery centers before delivery to each outlet.



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	676 (1999)	18	Bangkok and major cities	Importer Distributor Manufacturer
Big C, Supercenter (Casino Group)	France	429 (1999)	25	Bangkok and major cities	Importer Direct Distributor Manufacturer
Lotus, Supercenter (Tesco Group)	UK	311 (1999)	24	Bangkok and major cities	Importer Direct Distributor Manufacturer
Tops, Supermarket (CRC Ahold)	The Netherlands	248 (1999)	41	Bangkok and major cities	Importer Distributor Manufacturer
Carrefour, Hypermarket	France	194 (1999)	11	Bangkok and major cities	Importer Direct Distributor Manufacturer
Home Fresh Mart, Hypermarket	Thai	157 (1999)	8	Bangkok, Nakorn Rachasima	Importer Distributor Manufacturer
Siam Jusco, Supermarket	Japan	101 (1999)	14	Bangkok	Importer Direct Distributor Manufacturer
Emporium, Supermarket	Thai	101 (1999)	1	Bangkok	Importer Distributor Manufacturer
Foodland, Supermarket	Thai	68 (1999)	7	Bangkok, Pattaya	Importer Distributor Manufacturer

Tang Hua Seng, Supermarket	Thai	41 (1999)	5	Bangkok	Importer Distributor Manufacturer
Food Lion, Supermarket (Delhaize Le Lion)	Belgium	50 (1999)	20	Bangkok, Uttaradit	Importer Distributor Manufacturer
Isetan, Supermarket	Japan	39 (1999)	1	Bangkok	Importer Direct Distributor Manufacturer
Auchan, Hypermarket	France	30 (1999)	1	Chiang Mai	Importer Direct Distributor Manufacturer
UFM Fuji, Supermarket	Thai	20 (1999)	2	Bangkok	Importer Distributor Manufacturer
Villa, Supermarket	Thai	17 (1999)	Six and one franchise	Bangkok	Importer Distributor Manufacturer
Marks & Spencer, Supermarket	Thai	1.15 (1999)	7	Bangkok	Importer Direct Distributor
Others	Thai	1,092 (1999)	371	Bangkok and all cities nationwide	Distributor Manufacturer

Sources: Pacrim interviews with company management, The Bangkok Post, The Nation.

In the Thai retail food sector, Siam Makro is the leading wholesaler. Tops is the leading supermarket chain, with other major players including the Emporium, Siam Jusco, Foodland, Tang Hua Seng, Food Lion, Isetan, Auchan, UFM Fuji and Villa. Big C was acquired by the

French Casino retail group and has become a leading supercenter chain. Carrefour became a leading hypermarket chain in 1999.

Siam Makro currently has 19 outlets located in Bangkok and major cities. Makro has reported USD 19 million profit in the first nine months of year 2000. The increase in revenue of the company derived from the increase in product selection of non-food categories. Makro currently owns 19 stores nationwide, 46 Max Auto Express outlets, 26 car washes and 13 petrol stations.

41 Tops supermarket outlets are located in the prime areas of Bangkok and in major cities in 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 Supercenter opened new branches in Ubon Ratchathani, Phuket, Hat Yai, Hua Mark and Samut Prakan. It is a market leader in the supercenter segment. Big C uses Electronic Data Intechange (EDI) to allow suppliers to exchange information, including product orders, with Big C via an electronic network. 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.

Tesco-Lotus supercenter distribution centre in Ayutthaya, covers 50,000 square metres. The system offers cost savings for vendors and enables efficient transport of goods from the center to Chiang Mai and Phuket. A direct supply-chain network between Thailand and the UK will operate by 2002. It plans to open six new stores in 2001. Tesco has taken substantial business away from traditional 'wet markets' for fresh food.

Carrefour has put much effort into looking different from its rival-Tesco-Lotus, with brightly lit flowing colour schemes, complemented by distinctive staff uniforms. Carrefour imports food directly, so U.S. exporters might want to consider this chain when entering the Thai market.

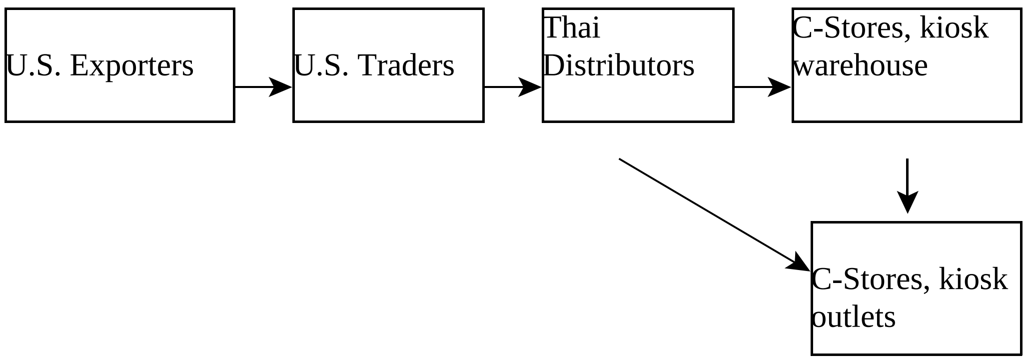
The sales of imported food increased 5.8 percent in 1999 even with the Baht devaluation, high oil prices and negative consumer sentiment. Food imports into Thailand are expected to increase. High import taxes and a less than transparent FDA approval process are government instruments for protecting local manufacturers.

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	348 (1999)	1,450	Bangkok, all major cities	Distributor Manufacturer
AM/PM, Convenience	Thai	20 (1999)	280	Bangkok, major cities and national highways	Distributor Manufacturer

Siam Familymart, Convenience	Japan	11 (1999)	108	Bangkok	Wholesale Distributor Manufacturer
Star Mart, Convenience (Caltex)	USA	8.4 (1999)	300	Bangkok, major cities and national highways	Distributor Manufacturer
Lemon Farm, Convenience	Thai	8 (1999)	8	Bangkok, Phitsanulok, Phetchaburi, Songkla	Direct Distributor Manufacturer
Tiger Mart, Convenience (Esso)	Thai	6 (1999)	300	Bangkok, major cities and main highways	Distributor Manufacturer
KFC, kiosk	Thai	3.5 (1999)	20	Bangkok and main highways	Distributor
Select, Convenience (Shell)	Thai	2.9 (1999)	110	Bangkok, major cities and main highways	Distributor Manufacturer
Q8 Shop, Convenience	Thai	2.1 (1999)	84	Bangkok, major cities and main highways	Distributor Manufacturer
Lemon Green, Convenience	Thai	1.89 (1999)	120	Bangkok, major cities, main highways	Distributor Manufacturer
PTT mart, gas mart	Thai	1.76 (1999)	120	Bangkok, major cities and main highways	Distributor Manufacturer

S & P Jet mart, kiosk	Thai	0.43 (1999)	2	Bangkok	Distributor
Delifrance, kiosk	France and Thai	0.21 (1999)	One	Bangkok	Importer Distributor
Others	Thai	172 (1999)	1000	Bangkok and all cities	Distributors Manufacturer

Sources: Pacrim interviews with company management, The Bangkok Post, The Nation.

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.

The market leader in this segment is 7-Eleven. 7-Eleven experienced 25 percent growth in 2000 due mainly to fast expansion of its outlets nation wide and the higher purchasing power of the younger generation. Each outlet earned USD 1,052 daily countrywide. Some convenience stores such as Shell Select will develop new features in order to create western-style fast food outlets like McDonalds to attract those target groups.

Most food products sold in convenience stores in Thailand are locally produced, with liquor a notable exception.

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.

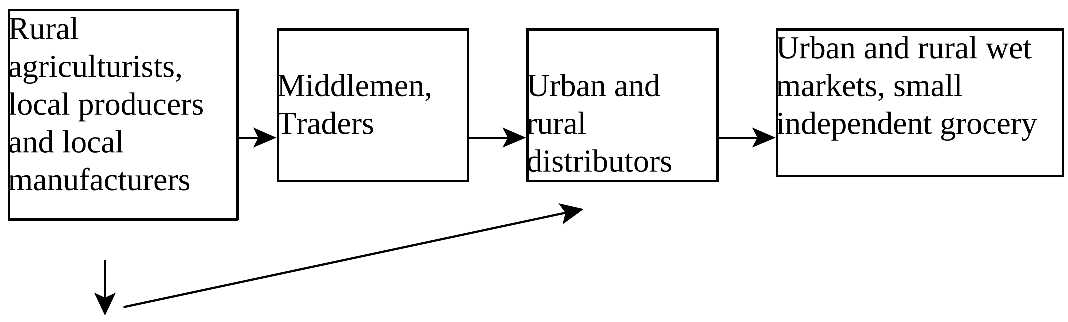
C. Traditional Markets

‘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	4,597	300,000	Bangkok and all cities, provincial and district capitals, and villages	Distributor Manufacturer
Wet Market	Local	6,921	600,000	Bangkok and all cities, provincial	Distributor Producer

				and district capitals, and villages	

Sources: Pacrim interviews and Pacrim retail surveys, The Bangkok Post, The Nation

Thailand has been an agricultural based country for centuries. The present population is 63 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 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 are 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 IV. Post Contact and Further Information

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Mr Atthapon Uraipriwan, Marketing Director

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