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Thailand

Food Service - Hotel Restaurant Institutional

2016

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Report Highlights:
This report contains information about Thailand's food service industry. It provides an overview of market opportunities and key channels of distribution for U.S. food and beverage products destined for the food service market in Thailand.

Post:
Bangkok

Executive Summary:
SECTION I: MARKET SUMMARY

Market Overview

Thailand, with its 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. Its population is more than 65 million at the end of 2015. Over 10 percent of total population lives in Bangkok, which accounts for 90 percent of the sales of fast moving consumer goods. Most of the medium and high-income Thais live in major cities, including Bangkok, Phuket, Chiang Mai, Pattaya, Chonburi, Khon Kaen, Nakorn Ratchasima, Nakornsawan, Petchaburi, Ratchaburi, Samui Island, Surat Thani, Ubon Ratchatahni and Udon Thani. About 46 million Thais are between 15-64 years old (72%). The population is literate due to comprehensive schooling, increased overseas studies, international travel, access to the internet and cable TV. Theravada Buddhism is the national religion and is actively practiced by about 95 percent of Thais, with the remainder practicing Islam, Christianity, Hinduism and other faiths. Given the economic importance of the HRI sector in Thailand, opportunities abound for U.S. products

Thailand's Key Economic Indicators (* in Billion)

Economic Projection 2015 and 2016					
	Actual Data		Projection		
	2014	2015	2016		2017
			Aug 15, 2016	Nov 21, 2016	Nov 21, 2016
GDP (at current price: Bil.USD)	404.3	395.1	395.3	397.6	413.6
GDP Growth (at constant price, %)	0.8	2.8	3.0-3.5	3.2	3.0-4.0
Investment (at constant prices, %)	-2.4	4.7	3.3	3.0	5.0
Private (at constant prices, %)	-1.0	-2.0	1.5	1.2	2.8
Public (at constant prices, %)	-7.3	29.8	10.0	10.0	11.2
Private Consumption (at constant prices, %)	0.6	2.1	2.7	3.0	2.7
Public Consumption (at constant prices, %)	2.1	2.2	3.9	0.6	2.1
Export volume of goods&services (%)	0.2	0.1	2.5	3.2	3.0
Export value of goods (Bil.USD)	226.7	214.1	208.0	214.1	219.2
Growth rate (%)	-0.3	-5.6	-1.9	-	2.4
Growth rate (Volume, %)	0.7	-3.4	-0.9	0.2	1.2
Import volume of goods&services (%)	-5.3	-0.4	-1.3	-1.5	3.6
Import value of goods (Bil.USD)	209.4	187.2	166.7	177.5	185.5
Growth rate (%)	-7.9	-10.6	-6.7	-5.2	4.5
Growth rate (Volume, %)	-6.2	0.3	-2.6	-2.5	1.5
Trade balance (Bil.USD)	17.3	26.8	41.3	36.6	33.7
Current account balance (Bil.USD)	15.1	32.1	38.6	45.0	42.1
Current account to GDP (%)	3.8	8.2	9.8	11.3	10.2
Inflation (%)					
CPI	1.9	-0.9	0.1-0.6	0.2	1.0-2.0
GDP Deflator	1.0	0.2	0.1-0.6	0.5	1.5-2.5
Source: Office of the National Economic and Social Development Board, 21 November 2016					

Thailand imported $340 million in consumer oriented foods from the United States in 2016 (Jan.-

October.), slightly more than last year's $339 million. Thailand's highly competitive hotel, restaurant, and institutional food service (HRI) sector comprises approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. However, the official registered number of restaurant operators as of February 2016 was 11,020, a 27 percent increase from the previous year. The industry has steadily increased in recent years driven by continuous growth in the country's tourism industry as well as a change in consumer behavior as modern urban families tend to eat out more regularly. There are minimal barriers to entry for newcomers entering the market. HRI establishments are heavy users of imported products for food preparation, ready-to-eat meals, and catering services for airlines and cruise lines. This sector attracts middle to higher income Thais, corporate businessmen, expatriates, and tourists. In 2015, consumer expenditures on hotels and catering per capita were $491, which accounted for 15 percent of total consumer spending.

Consumer Expenditure on Hotels and Catering 2010-2015						
(m; US$)	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**
Catering	16,568	19,378	21,851	25,407	24,655	23,709
Accommodation	6,520	8,064	9,290	10,993	10,020	9,677
Total Consumer Expenditure on Hotels and Catering	23,088	27,442	31,141	36,400	34,675	33,386
Source: Euromonitor and USDA Foreign Agricultural Service - Bangkok, Thailand						

Tourism Industry

The hotel and restaurant sector expanded by 14.8 percent in the first nine months of 2016 in line with the 13.35 percent increase in the number of tourist arrivals to Thailand, which totaled 34 million. Thailand's tourism industry generated a total of $53.7 billion for the Thai economy during the first nine months of 2016, representing a year-on-year increase of 14 percent. According to the Department of Tourism, the fast recovery and high growth were the result of the more peaceful domestic situation, helped by the growth of low cost airlines and government measures to boost tourism. Another contributing factor to the growth prospects for the Thai tourism industry includes additional international air links that have been established from Russia (Moscow, Vladivostok and Yekaterinburg), the Middle East (Tehran, Dubai and Doha), and Asia (Hong Kong, Mandalay, Luang Prabang and Vientiane). The number of inbound tourists from China, Laos, and Malaysia were the top three fastest growing groups. The average occupancy rate increased to 60.4 percent compared with 58.5 percent in the same period in 2015. The increase in tourist arrivals and increasing food consumption are expected to continue fueling the growth in this sector. In addition, the continued growth in construction projects involving new community shopping malls is expected to serve as perfect venues for most of the global food chains and premium restaurants.

Number of International Tourists 2012-2016 (visitors in thousands)						
Month	**2012**	**2013**	**2014**	**2015**	**2016P**	**% Change 2015/2014**
January	1,992	2,318	2,283	2,614	3,001	14.51%
February	1,854	2,367	2,075	2,664	3,089	28.38%
March	1,896	2,322	2,018	2,555	2,949	26.63%
April	1,686	2,058	1,935	2,407	2,643	24.39%
May	1,547	1,944	1,671	2,302	2,477	37.75%
June	1,645	9,062	1,491	2,270	2,433	52.18%
July	1,816	2,149	1,896	2,642	2,946	39.31%
August	1,927	2,356	2,085	2,590	2,874	24.21%
September	1,612	1,995	1,869	2,045	n/a	9.37%
October	1,801	2,055	2,208	2,246	n/a	1.72%
November	2,144	2,378	2,425	2,566	n/a	5.81%
December	2,435	2,542	2,853	3,024	n/a	5.99%
Total	**22,354**	**26,547**	**24,810**	**29,923**	**22,413**	**20.61%**
Source: Department of Tourism						

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 most favorite tourist destinations in the world. Spending by international tourists on food and beverage products totaled US$8.3 billion in 2015. Tourists are staying in Thailand longer than in previous years with an average of about 9.47 days. Average spending per tourist is about 5,142.18 baht (US$150.14) per day with 19 percent spent on food and drinks, 30 percent on accommodations, 24 percent on shopping, 11 percent on entertainment, 10 percent on transportation, and 4 percent on sightseeing. The number of tourist arrivals in Thailand is steadily increasing from 14.5 million in 2007 to 29.92 in 2015. Tourists from Asia and Europe make up nearly 90 percent of total tourist arrivals. Cost and safety are two important factors luring tourists to Thailand. In addition, convenient and cheaper airfares are helping draw more international tourists.

In 2015, the number of international tourists to Thailand exceeded the initial target of 28.8 million visitors and reached a record high of 29.92 million, a 24 percent increase from 24.81 million visitors in 2014.

Number of International Tourists and Revenue Received (2009-2015)				
Year	No. of Tourists	% Change	Revenue from Tourism (USD Mil)	% Change
2009	14,149,841	-2.98%	14,881	-13.73%
2010	15,936,400	12.63%	18,706	25.71%
2011	19,230,470	20.67%	25,458	36.10%
2012	22,353,903	16.24%	31,655	24.34%
2013	26,546,725	18.76%	39,282	24.10%
2014	24,809,683	-6.54%	36,108	-8.08%
2015	29,923,185	20.61%	42,545	17.82%
Source: Department of Tourism				

The Thai government continues to implement plans to strengthen the country's infrastructure, including its airports and transportation system. The TAT has already unveiled a series of strategies to strengthen the brand image of Thailand and enhance its marketing profile in order to increase tourist arrivals. The rapid expansion of low cost carriers from the private sector could further propel tourism growth across the region and contribute to stronger performances in the coming years.

Number of International Tourists Arrivals: 2013-2015						
Country of Nationality	2013		2014		2015	
	Number	Share	Number	Share	Number	Share
East Asia	15,911,375	60%	14,683,618	59%	13,115,391	61%
Europe	6,305,945	24%	6,093,701	25%	4,692,873	22%
The Americas	1,166,633	4%	1,077,797	4%	1,041,235	5%
South Asia	1,347,585	5%	1,223,654	5%	999,398	5%
Oceania	1,021,936	4%	944,370	4%	800,827	4%
Middle East	630,243	2%	623,260	3%	582,202	3%
Africa	163,008	1%	163,283	1%	137,866	1%
Total	**26,546,725**	100%	**24,809,683**	100%	**21,369,792**	**100%**
Source: Department of Tourism						

According to the Ministry of Tourism and Sports, visitors from the East Asia region made up the largest segment of tourists at 13 million arrivals, representing a 61 percent share of the overall tourism market to Thailand. Europe is the second largest market with 4.7 million visitors, followed by The Americas and South Asia at 1 million arrivals.

Currently, Thailand has developed into a major convention and incentive destination for the Asia region, competing with Singapore and Hong Kong. Thailand's Meetings, Incentives, Conventions and

Exhibitions (MICE) sector comprises three main industry categories: corporate meetings (25 percent market share), incentive travel (24 percent), international conventions (33 percent), and international exhibitions and trade fairs (18 percent). During October 2015 – March 2016, Thailand welcomed a total of 493,384 MICE visitors, a steady growth of 3.63% compared to the same period in 2015. These visits have generated a total revenue of $1.2 billion. According to Thailand Convention and Exhibition Bureau (TCEB), the country will have welcomed 1.06 million MICE visitors by the end of year 2016, which marks a 5 percent growth, generating more than $2.7 billion in revenue.

The average spending per day is normally double that of regular leisure tourists. The MICE market is forecast to expand more due to lower costs offered by Thai convention facilities, as well as convenience, efficient transportation infrastructure such as the sky train, subway and the new airport. Currently, Thailand has five convention and exhibition centers that meet international standards: the Queen Sirikit National Convention Center, BITEC, IMPACT, the Pattaya Exhibition and Convention Hall (PEACH), and the Golden Jubilee Convention Hall in Khon Kaen. Plans to establish the MICE Bureau, new two convention centers in Chiang Mai and Phuket, as well as the opening of the Central World Plaza hotel and Convention Center in the center of downtown Bangkok will also help to increase the competitive advantage of Thailand over its Asian neighbors. This would pave the way for Thailand to become a MICE hub within the region, thus, providing good opportunities for key cities (e.g., Chiang Mai, Khon Kaen, Chonburi and Phuket) to earn more from this niche market. The TCEB's MICE Development Plan 2017 aims to help Thailand to achieve its overall targets of $4.5 billion revenue, welcoming a total of 27.1 million MICE visitors in 2017. Of this revenue, $3 billion will be generated from international markets, which will include 1.1 million international MICE visitors to Thailand, while $1.5 billion will be generated from the domestic market, with the total number of domestic MICE visitors reaching 26 million.

Infrastructure

Thailand is one of Asia's premier aviation hubs with six international airports, namely Suvarnabhumi, Don Mueang, Chiang Mai, Chiang Rai, Phuket, and Hat Yai. All of Thailand's airports are managed by the Airports of Thailand (AOT). For 2015, the six airports handled 106.79 million passengers, a 21.94% increase compared to the same period last year. It comprised 61.34 million international passengers and 45.45 million domestic passengers. The increasing volume of air traffic and passengers can be attributed to several factors including the development of airports, particularly Suvarnabhumi Airport, becoming a hub for air cargo transportation and tourism of Asia and the world, and TAT's proactive policy aimed at expanding new markets for tourism.

In December 2015, Airports of Thailand (AOT) opened newly renovated Terminal 2 at Don Muang International Airport, raising Don Muang's passenger-handling capacity from 18.5 million to 30 million, accommodating increasing low-cost carrier passenger traffic. Furthermore, AOT is in the process of expanding other airports and facilities in major tourist destinations, including the expansion of Suvarnabhumi Airport and Phuket International Airport, which will almost double their passenger handling capacity.

Six International Airports' Traffic Results						
	Traffic Results (2014-2015)					
	Aircraft Movements (flights)			Passengers (persons)		
Airports	2014	2015	% Change	2014	2015	% Change
Suvarnabhumi Airport	292,932	310,870	6.12%	46,497,257	52,384,217	12.66%
Don Mueang International Airport	161,831	214,809	32.74%	19,349,941	28,589,312	47.75%
Chiang Mai International Airport	49,679	62,626	26.06%	6,213,463	8,069,918	29.88%
Hat Yai InternationalAirport	20,965	24,258	15.71%	2,944,259	3,568,093	21.19%
Phuket InternationalAirport	74,501	82,000	10.07%	11,275,805	12,538,042	11.19%
Chiang Rai International Airport	10,029	12,799	27.62%	1,291,708	1,640,332	26.99%
Total	609,937	707,362	15.97%	87,572,433	106,789,914	21.94%
Source: The Airports of Thailand						

Thailand’s six airports experienced higher volumes of air traffic in year 2015 compared with the previous year. In 2012, the Thai Cabinet designated the Suvarnabhumi Airport as a regional hub while Don Mueang International Airport was selected to focus on serving low-cost carriers (LCCs) and/or accommodate point-to-point domestic and international flights. U-Tapao Rayong-Pattaya International Airport became a fully functional commercial airport in June 2015. The low cost carrier, AirAsia has since October launched new connections to China from U-Tapao. According to Airports of Thailand, international flights grew 13.7 percent while international flights by low-cost carriers increased by 19.6 percent.

Thailand has a coastline of 3,219 kilometers (km), with over 4,000 km of waterways. Ports include Bangkok, Laem Chabang, Pattani, Phuket, Sattahip, Sriracha and Songkhla. Current commercial ports:

• Klong Toey or Bangkok Port is the largest port in Thailand and can handle approximately 1.34 million Twenty-Foot Equivalent Unit (TEU)/year.
• Laem Chabang handles about 6.9 million TEU/year. Laem Chabang Port is located in the Tungsukhla Sub-District, Sriracha District and Banglamung Sub-District of Chon Buri Province. The port covers an area of around 2,536 acres.
• Sriracha Harbour Deep Seaport was the first port in Thailand able to accommodate vessels up to 100,000 deadweight (dwt) and is accessible for 95 percent of the year.

Hospitality Industry

Thailand’s hospitality sector experienced increased tourist arrivals reaching 29.9 million in 2015 and generated a record $42.5 billion, a 18 percent increase from 2014. Growth in the country’s tourism sector is expected to continue, with the Tourism Authority of Thailand has set a 2017 target of 36 million international tourist arrivals with estimated revenues reaching $55 billion, 9.8 percent increase from 2016. As a result, a growth from the tourism industry positively contributed to spending circulating in various tourist destinations.

Thailand Tourism Statistics 2011-2015

	2011	2012	2013	2014	2015
Number of Foreign Tourists (in thousands)	19,230	22,354	26,547	24,810	29,881
Hotel Occupancy Rate (percent)					
Total	57.73	60.81	64.86	55.58	61.72
Central (including Bangkok)	60.41	63.88	69.12	55.29	65.37
South	60.66	61.84	64.38	59.46	60.00
North	45.38	50.67	55.02	53.87	57.68
Northeast	46.35	48.85	46.98	46.49	42.66
Average Room Rate (Baht/room)					
Total	1,843	1,894	1,949	1,982	2,062
Central (including Bangkok)	1,834	1,863	1,896	1,890	1,988
South	2,466	2,547	2,630	2,752	2,817
North	1,204	1,285	1,382	1,421	1,488
Northeast	766	847	916	939	941
Share of Foreign Tourists to Total Guests (percent)					
Total	64	67	70	67	70
Central (including Bangkok)	69	74	77	72	75
South	73	73	75	75	76
North	47	49	54	55	63
Northeast	12	14	14	14	13

Source: Bank of Thailand

The hotel business in Thailand grew satisfactorily in 2015, rebounding from 2014. The average nationwide occupancy rate for hotels in 2015 was 61.7%, improved from 55.6% in 2014. Across regions in Thailand, the Central region had the highest occupancy rate, 65.4% in 2015. A decrease in the number of Russian tourists lowered the occupancy rate in the South to 60% in 2015. Recently, the North became more popular for Chinese tourists. The occupancy rate rose to 57.7%, the highest level in the past five years. Competition in the hotel industry is also expected to be increasing. Currently, about 20 percent of the hotel rooms in Thailand are operated by international chains and the rest by independent operators. The hotel industry continues to evolve especially in Bangkok, Phuket, Pattaya, Samui, Chiang Mai, and Hua Hin. In the first half of 2015, the Revenue per Available Room (RevPAR) of hotels in Thailand averaged at $81, up 18.4 percent compared to the same period in 2014, driven by a 9 percent increase in occupancy to 74.7 percent. However, Average Daily Rate (ADR) fell 2.8 percent to $109. According to STR Global, Bangkok in the first half of 2015 recorded the highest increase in occupancy, up 38.7 percent to 76 percent, and the highest RevPAR growth of 46.1 percent to $73. Samui Island had the highest ADR of $248, compared to Chiang Mai, which had the lowest at $93.

Average No. of Customers per Day Using the Hotel's Restaurant 2013					
Region and size of establishment	**Average number of customers per day**	**Thai**		**Foreigner**	
		Number	**%**	**Number**	**%**
Whole Kingdom	**281,926**	**102,345**	**36.3**	**179,581**	**63.7**
Fewer than 60 rooms	94,571	39,169	41.42	55,402	58.6
60-149 rooms	64,585	29,091	45.04	35,494	55.0
Over 150 rooms	122,770	34,085	27.76	88,685	72.2
Bangkok	**47,965**	**15,492**	**32.3**	**32,473**	**67.7**
Fewer than 60 rooms	4,402	1,346	30.57	3,056	69.4
60-149 rooms	10,247	2,745	26.79	7,502	73.2
Over 150 rooms	33,316	11,401	34.22	21,915	65.8
Central Region	**77,540**	**35,252**	**45.46**	**42,288**	**54.5**
Fewer than 60 rooms	27,856	14,775	53.04	13,081	47.0
60-149 rooms	22,441	11,172	49.79	11,269	50.2
Over 150 rooms	27,243	9,305	34.15	17,938	65.8
Northern Region	**27,288**	**16,098**	**58.99**	**11,190**	**41.0**
Fewer than 60 rooms	11,628	6,615	56.89	5,013	43.1
60-149 rooms	10,594	6,396	60.38	4,198	39.6
Over 150 rooms	5,066	3,087	60.92	1,979	39.1
Northeastern Region	**12,445**	**10,304**	**82.8**	**2,141**	**17.2**
Fewer than 60 rooms	4,276	3,742	87.51	534	12.5
60-149 rooms	4,376	3,438	78.56	938	21.4
Over 150 rooms	3,793	3,124	82.37	669	17.6
Southern Region	**116,688**	**25,199**	**21.59**	**91,489**	**78.4**
Fewer than 60 rooms	46,409	12,691	27.3	33,718	72.7
60-149 rooms	16,927	5,340	31.54	11,587	68.5
Over 150 rooms	53,352	7,168	13.44	46,184	86.6
Source: National Statistical Office					

With a number of leading international hotel chains entering the Thai market, existing hotels are readjusting their marketing strategies and focusing more on revenues from food and beverage sales. For 4 to 5 star hotels with 400 rooms or more, food and beverage sales accounts for about 40 percent of total revenues while spending an average of 30 percent to purchase products. It is estimated that the hotel food and beverage market grew at least 18 percent in 2015. The entire HRI sector sources about 30-35 percent of their food products through imports. The United States has approximately 20 percent share of this market. U.S. beef, fruits, lobster, fish, crab, seasonings, wine, etc. are well known in Thailand's hotel/restaurant trade as well as in the airline catering sector.

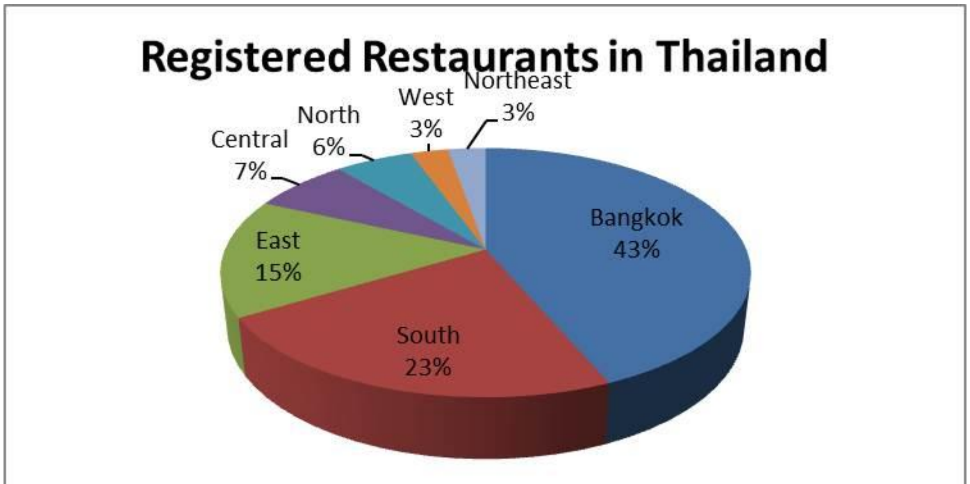
Hotels' Revenue by Category 2013 (in US$ Thousand)

Region and size of establishment	Number of Hotels	Total	Receipts from Guest Room Sales		Receipts from Restaurant	Receipts from Entertainment	Receipts from Souvenir Shop	Receipts from Meeting/Seminar Room	Other Receipts
			Total	Online Sales					
Whole Kingdom	**10,018**	**5,254,854**	**3,531,282**	**432,528**	**1,155,775**	**164,852**	**13,718**	**189,082**	**200,146**
Fewer than 60 rooms	8,171	820,902	658,838	46,346	107,233	30,536	1,374	7,434	15,486
60-149 rooms	1,259	901,813	655,482	74,358	184,466	20,125	902	23,622	17,215
Over 150 rooms	588	3,532,140	2,216,961	311,823	864,076	114,190	11,442	158,026	167,444
Bangkok	**704**	**1,574,188**	**1,000,691**	**165,246**	**338,990**	**59,731**	**6,163**	**89,831**	**78,781**
Fewer than 60 rooms	321	70,252	59,632	957	9,586	-	-	43	991
60-149 rooms	207	215,425	175,049	32,342	26,437	1,721	312	7,080	4,825
Over 150 rooms	176	1,288,511	766,009	131,947	302,967	58,010	5,851	82,708	72,965
Central Region	**2,532**	**1,011,005**	**717,030**	**60,253**	**212,498**	**8,329**	**1,766**	**33,248**	**38,134**
Fewer than 60 rooms	2,025	194,721	164,296	9,670	22,224	621	621	3,329	3,631
60-149 rooms	362	234,468	175,891	10,824	46,415	1,512	152	4,273	6,226
Over 150 rooms	145	581,816	376,844	39,758	143,858	6,197	994	25,646	28,276
Northern Region	**1,854**	**397,389**	**237,499**	**42,445**	**91,779**	**33,536**	**239**	**26,327**	**8,009**
Fewer than 60 rooms	1,601	166,527	106,970	25,782	32,807	22,393	129	1,131	3,095
60-149 rooms	202	113,425	81,725	13,679	20,381	2,704	69	5,857	2,689
Over 150 rooms	51	117,437	48,803	2,984	38,591	8,438	41	19,339	2,225
Northeastern Region	**1,215**	**219,234**	**143,300**	**6,362**	**41,920**	**11,146**	**2,351**	**15,702**	**4,815**
Fewer than 60 rooms	1,044	55,836	49,023	686	3,917	1,067	142	1,248	440
60-149 rooms	140	60,868	38,272	793	12,874	5,559	256	3,647	261
Over 150 rooms	31	102,530	56,005	4,883	25,129	4,520	1,953	10,808	4,114
Southern Region	**3,713**	**2,053,039**	**1,432,762**	**158,222**	**470,588**	**52,109**	**3,199**	**23,974**	**70,406**
Fewer than 60 rooms	3,180	333,565	278,917	9,252	38,699	6,455	482	1,682	7,329
60-149 rooms	348	277,626	184,545	16,719	78,359	8,629	113	2,766	3,215
Over 150 rooms	185	1,441,847	969,300	132,250	353,530	37,026	2,604	19,525	59,863

Source: National Statistical Office

Restaurant Industry

Thailand's restaurant sector continues to grow due to increased spending. According to the Office of National Economic and Social Development Board, Thailand's hotel and restaurant sectors expanded by 15.9 percent in the third quarter of 2016, 12.7 percent higher than in the previous quarter. There are 11,020 restaurants registered with the Ministry of Commerce (as of March 31, 2016).



Source: Department of Business Development, Ministry of Commerce

The long term outlook for the restaurant industry remains positive owing to increasing urbanization, higher consumer disposable income, and a trend towards eating out. Furthermore, overseas studies, international travel, wider availability of the internet, and the growing use of social media increasingly influences younger Thais and urbanites to move away from traditional open-air food stands to indoor restaurants, especially those located in retail malls. The continued expansion of retail mall operators and modern retail food establishments will give Thais, particularly those in the provincial areas, easier access to casual dining restaurants. The changing lifestyles and behavior of consumers is leading to innovations and changes in the restaurant business including changes to restaurant setups and the introduction of new food products that are more modern and suitable for the new generation of consumers. Other trends include: expansion of online sales channels and online marketing, using technology in the restaurants to increase sales and customer relationship management, and bringing in new brands to give customers more choices.

Market Share of Western Casual Dining in Thailand

	2013		2014		2015	
(US$ Million)	Revenue	(%)	Revenue	(%)	Revenue	(%)
Café	157	10%	163	10%	182	11%
Restaurants	660	42%	638	41%	647	39%
Fast Food	575	37%	574	37%	621	38%
Ice Cream & Bakery	172	11%	177	11%	189	12%
Total	1,564	100%	1,552	100%	1,639	100%

Source: Ministry of Commerce and Industry Estimates

The restaurant business is one of the most competitive industries in Thailand. Food outlets are everywhere, from small carts dotting every street and pathway to five-star restaurants in some of the world's finest hotels. Thailand's restaurants can be divided into three categories as follows:

1. Quick Service Restaurants (QSR) hold about a 10 percent market share of the overall restaurant industry and have become increasingly popular in Thailand, with a projected annual growth rate of 8-10 percent. Patrons of QSRs in Thailand today increasingly are a diverse group including traditional families, office workers, teenagers, and tourists. Traditionally, about 80 percent of Thailand's food franchises are formed through partnerships with U.S. brands such as McDonald's, KFC, and Starbucks. Currently, QSRs cater primarily to the top one-third of all Thai consumers due to the limited spending power of the remaining two-thirds of the population. It is estimated that the QSR market will grow to reach nearly US$4.6 billion by 2020.

The QSR market is mainly dominated by franchise businesses, which primarily sell chicken , burgers, bakery products, ice cream, and breakfast meal. Examples of QSRs currently operating in Thailand are KFC, McDonalds, the Pizza Company, Burger King, Dairy Queen, A&W, Chester's Grill, Subway, Auntie Anne's, Baskin Robbins, Swensen's, etc. The QSR sector in Thailand has recently encountered challenges from consumers that perceive fast food products as less nutritious than ordinary Thai food and they seek healthier options. Furthermore, the growth of the QSR restaurant segment has been hindered by the expansion of local small and medium enterprise (SMEs) restaurants located in hypermarkets and department stores.

Comparative Market Share in the Thai QSR Market (2015)
(US$ Million)

Revenue	2013 Revenue	2013 (%)	2014 Revenue	2014 (%)	2015 Revenue	2015 (%)
Chicken	477	16%	499	15%	519	15%
Burger	192	6%	199	6%	215	6%
Bakery Products	329	11%	324	10%	314	9%
Ice Cream	226	8%	240	7%	250	7%
Convenience Store	1,759	59%	1,974	61%	1,974	57%
Others	10	0.3%	10	0.3%	170	5%
Total	**2,993**	100%	**3,246**	100%	**3,443**	100%

Source: Euromonitor

2. International/High-end Restaurants have the highest growth in the restaurant sector with a total market value of more than US$500 million. This segment represents about 10 percent of the restaurant industry. In Thailand, Japanese restaurants are ranked number one in terms of consumer preference, followed by Italian, Chinese, American, and Vietnamese. According to Euromonitor, the overall full-service restaurant market value in 2015 was $4.9 billion, the modest growth rate mainly due to high household debt and the uncertain political situation. However, consumer confidence rebounded in the last quarter of the year, following a series of government stimulus measures, which enhanced economic growth prospects.

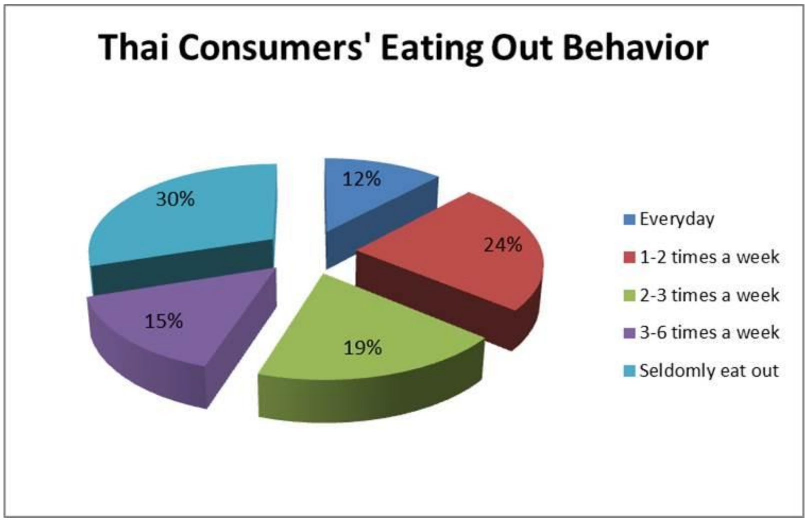
Sales in Full-Service Restaurants 2010-2015 (in $millions)

Full-Service Restaurants	2010	2011	2012	2013	2014	2015
Chained Full-Service Restaurants	1,334.20	1,492.30	1,631.20	1,853.30	1,830.80	1,801.70
Independent Full-Service Restaurants	3,335.40	3,325.00	3,243.40	3,303.30	3,209.70	3,134.30
Total	4,669.60	4,817.40	4,874.60	5,156.70	5,040.50	4,936.00

Source: Euromonitor and USDA Foreign Agricultural Service - Bangkok, Thailand

3. Small Restaurants (SMEs-Small Medium Enterprises) are what most new Thai food-related entrepreneurs begin with due to their low initial investment cost. The industry estimates that the market share for this sector is about 80 percent of all restaurants. The Thai marketplace has changed over time with the entry and influence of hypermarkets, especially in small neighborhood shopping centers. Their presence in food courts have also raised standards and increased their market share at the expense of street vendors.

The increasing numbers and popularity of new small restaurants have taken market share away from hotels' food and beverage outlets. General restaurants have been replaced in the market by restaurant chains such as Oishi, Fuji, Zen, MK Suki, S&P, Black Canyon, Seefah restaurants, etc. Currently, Thailand has more than 1,000 fast food branches nationwide and they are becoming more popular due to their convenience. Despite their popularity, the growth of these fast food outlets has slowed, mainly due to a change in Thai consumers' eating habits, which are trending to more healthy and ethnic cuisines. As more Thais travel abroad and receive greater exposure to foreign products, they are also exerting significant influence on the food service market in Thailand. For example, Japanese foods (Ramen restaurants and Japanese-style buffet restaurants) are emerging as a popular type of foreign food in Thailand, especially among Thai teenagers. Since Thai consumers generally eat less beef, many burger chains have diversified their menus to include pork, chicken, fish, and vegetables to accommodate local tastes. Changes in food purchasing and consumption patterns have encouraged Thais to eat out more and, as a result, there has been a growth in the overall foodservice market. According to a survey by Nielsen Research, 70 percent of Thais eat out at least once a week.



Traditionally, Thai families enjoy dining out, but most families, especially in the provinces, prefer to cook at home for everyday meals. Recently, home delivery and takeaway establishments have witnessed a surge in its consumer base due to their value and convenience, particularly among working professionals. An increase in eating out and patronizing restaurants is especially prominent among the younger Thais as well as working professionals. The competition in the restaurant business will be based on price and quality of food, variety and value perception of menu, service quality, number and location of outlets, effectiveness in new product development, advertising and sales promotion activities. In order to attract more clientele into their establishments, restaurateurs are implementing new strategies such as improving food quality and ambience, along with extending menu selections. Furthermore, the use of social media is creating unique opportunities to promote U.S. food products.

Consumer Expenditure on Alcoholic and Non-Alcohollic Beverages 2011-2015					
(m; US$)	2011	2012	2013	2014	2015
Non-Alcoholic Beverages	6,996.20	7,783.80	8,300.40	8,287.60	8,156.50
Coffee, Tea, and Cocoa	1,467.70	1,585.10	1,705.40	1,709.80	1,708.90
Mineral Waters, Soft Drinks, Fruit and Vegetable Juices	5,528.50	6,198.70	6,595.00	6,577.70	6,447.60
Alcoholic Beverages	5,271.00	5,578.70	5,359.00	5,160.40	4,948.30
Spirits	2,585.80	2,687.80	2,565.50	2,465.90	2,343.60
Wine	183.40	209.00	230.60	250.60	253.10
Beer	2,501.90	2,681.90	2,563.00	2,443.90	2,351.60
Source: Euromonitor and USDA Foreign Agricultural Service - Bangkok, Thailand					

Recently there has been a trend towards delivery service, ordered either via phone or online, and this is playing an increasing role in Thailand due to the behavior adjustment of customers with more need of convenience, and quickness because of their fast paced lifestyle, but who still prefer to have their favorite food. In order to restaurants to expand their customer base, most of the chained restaurants in Thailand have started partnering with food delivery providers or set up their own food delivery division to offer delivery service to their customers. Based on KResearch, it projects that the turnover in the restaurant food delivery business in 2017 could reach $830 million, increasing 11-15 percent year on year basis. Another interesting marketing strategy for restaurant business in Thailand that make them stand out from their completion is the strategy that correspond with the public trend such as promoting an image of a clean food campaign or new services the restaurants offer such as on-line order through social media applications.

Catering Service Business

The Thai catering sector has become increasingly concentrated and competitive. Catering businesses range from small to large-scale operations and are organized into four categories: contract caterers (Compass Group, F&B International Co.), airline and exhibition caterers (Thai Airways International Plc., LSG Sky Chefs, Bangkok Air Catering, BITEC, and Impact Arena), hotels and medium-high end restaurants, and local small caterers. It is estimated that 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 areas and special functions such as weddings ceremonies, birthday parties, seminars, new house ceremonies, etc.

Some of the medium-sized catering businesses import directly usually through better known and established importers and distributors. The target groups of the contract catering services in Thailand are primarily customers at private workplaces, employee restaurants and executive diners. These clients include local, national and international organizations, military services, hotels, hospitals, office buildings, and airlines. Hospitals, office buildings, and large factories are also providing more cafeterias and food courts for their staff and customers. These contract-catering services use both local and imported food products, depending upon their customers' requirements. Approximately 10 percent of the catering service menus use imported products such as french fries, beef, salmon, lamb, sauces and seasonings, cheese, fresh fruits & vegetables, seafood, turkey, and a variety of beverages.

SECTION II: MARKET OPPORTUNITIES

• Over the past few years, Thais living in urban areas have become relatively brand conscious, less price-oriented, and their shopping behavior has moved away from the traditional open-air wet markets to modern supermarkets and shopping centers which offer them convenience;
• High growth in the number of hotels, resorts, and other tourist accommodations continues to provide opportunities for the sale of imported food items;
• Hotels and international restaurants play an important role in increasing consumer awareness about U.S. products, which may not be common in retail markets (e.g. certain types of seafood);
• Changing eating habits and Thai lifestyles are fueling the growth in the restaurant sector and consumers are now eating out more frequently;
• The increase in the daily minimum wage have provided more disposable income for Thai consumers to try new restaurants;
• Upper and middle-income groups in Thailand like to spend money on food and outside dining, especially during the holidays. Consumption of imported food products peak during New Year, Christmas, Chinese New Year, and the Thai New Year; 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, seafood, frozen fries, dried and fresh fruits, nuts, fruit juice, jams, wines, and other products are always rated by local consumers as one of the best in the world;
• Thailand has long been an attraction for foreign restaurant chains and this requires high quality imported products.

Advantages and challenges facing US products in Thailand

Advantages	Challenges
- 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 strong competition from China, Australia, New Zealand, Japan and other neighboring countries impedes the entry of U.S. products.
- Thais in urban areas (52 percent of the population) increasingly spend more on imported food items and have become relatively brand conscious and are changing their eating habits to accept more western style foods.	- 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, makes U.S. products less competitive due to higher tariffs.
- Local Thai consumers view US-origin products as high quality and safe.	- Local manufacturers can improve or change quality of products, tastes or packaging sizes according to changes in consumer behavior and can lower production cost.
- 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, fruits & vegetables, 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 policies and actions try to increase demand for local Thai products.
- A wide range of restaurants and menus to meet demands of tourists requires a wide variety of	- Very high import tariffs on high value consumer food and beverage products,

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.

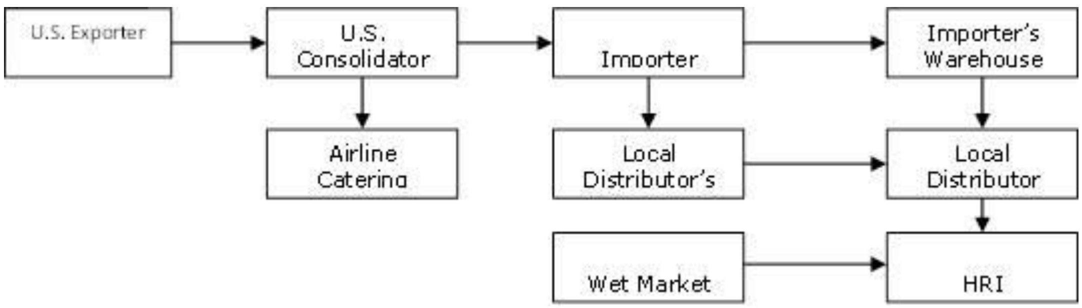
Food Show in Thailand

World of Food Asia 2017
Date: May 31-June 4, 2017
Venue: IMPACT Arena, Exhibition and Convention Center
Web Site: www.worldoffoodasia.com
Organizer's Contact Information:
INTERNATIONAL SALES
Ms. Lynn How
Koelnmesse Pte Ltd.
Tel: +65 6500 6712
Fax: +65 6294 8403
Email l.how@koelnmesse.com.sg

Food & Hotel Thailand (FHT) 2017
Date: September 6-9, 2017
Venue: BITEC, Bangkok
Web Site: www.foodhotelthailand.com
Organizer's Contact Information:
Bangkok Exhibition Services Ltd (BES)
SPE Tower, 9th Floor 252 Phaholyothin Rd., Samsennai,
Phyathai, Bangkok 10400
Tel. (+66) 02 615 1255 Ex. 111 Fax. (+66) 02 615 2991-3
Contact : Supaporn A. (Goog)
Email: supaporn.a@besallworld.com

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 affiliated companies who act as their distributors. Five star hotels and resorts are the heaviest users of U.S. products. International food restaurants located in the prime areas of Bangkok, Chiang Mai, Hua-Hin, Samui island, and Phuket 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:
• Meat: frozen and chilled beef, poultry, processed meats (ham, sausage, deli meats).
• Potatoes: frozen French Fries, hash browns, shoestrings, etc.
• Fresh and frozen seafood such as fish fillets, scallop, lobster, mussel, oyster, halibut, cod fish, Alaska king crab, etc.
• Dairy products: cheese, processed cheese, whipped topping, sour cream, ice-cream, dips
• American spices and seasonings.
• Bakery and baking products: flour, biscuits, pancake mixes, waffles, French toast, cookies, muffins, cakes, frosting and icings, and puff pastry.
• Beverage: fruit and vegetable juice, wine, liquor, whisky, beer, cocktail mixes, and mineral water.
• Canned foods (soup, fruit and vegetables).
• Condiments: bacon bits & toppings, barbecue and cocktail sauce, dips, hot sauce/pepper sauce, mayonnaise, mustard, olives, salsa and taco sauce, pickles, steak sauce, syrups, salad dressing, and vinegar.
• Fresh fruit and vegetables (organic and specialty vegetables, apples, grapes, cherries, kiwi fruit, blueberries, grapefruit, oranges).
• Jams, jellies, and spreads.

No.	Product	2013	2014	2015	%Change
1	Food Preparations Nesoi	384,314,081	132,754,513	146,952,149	10.69%
2	Skipjack Tunas Except Fillets, Livers, Roes, Frozn	207,806,726	147,929,588	84,456,138	-42.91%
3	Apples, Fresh	23,035,041	18,144,059	21,638,587	19.26%
4	Milk and Cream, Cntd,Swt,Powdr, Gran/Solids,Nov 1.5% Fat	44,852,909	37,443,648	21,118,571	-43.60%
5	Almonds, Fresh Or Dried, Shelled	10,875,942	13,685,606	18,704,061	36.67%
6	Potatoes, Prepared Etc., No Vinegar Etc., Frozen	17,630,761	17,634,645	16,517,087	-6.34%
7	Sockeye Salmon, Excl Fillet, Livers & Roes, Frozen	949,211	5,259,416	14,563,984	176.91%
8	Yellowfin Tuna Except Fillets, Liver & Roes Frozen	22,438,358	18,635,499	12,135,414	-34.88%
9	Fish Meat, Frozen, Except Steaks And Fillets Nesoi	4,774,906	4,761,826	10,714,985	125.02%
10	Grapes, Fresh	15,248,389	13,612,649	9,163,377	-32.68%
11	Cocoa Preparations, Not In Bulk Form, Nesoi	3,593,755	2,222,268	7,922,762	256.52%
12	Leguminous Vegetables Nesoi, Dried Shell, Inc Seed	12,838,313	5,190,935	7,319,127	41.00%
13	Raisins	3,646,512	5,615,250	7,110,912	26.64%
14	Edible Fats & Oil Mixtures & Prepar Nesoi, Etc	6,779,560	5,796,129	7,075,293	22.07%
15	Pistachios, In Shell, Fresh Or Dried	6,125,689	5,181,765	6,568,427	26.76%
16	Sauces Etc. Mixed Condiments And Seasonings Nesoi	5,643,687	5,057,075	4,747,946	-6.11%
17	Malt Extract; Flour, Meal, Milk Etc Prod Etc Nesoi	6,873,860	7,429,506	4,673,724	-37.09%
18	Crabs, Including In Shell, Frozen	1,126,808	4,332,062	4,563,314	5.34%
19	Tea Or Mate Extracts/Essences/Concentrates & Preps	3,213,032	3,896,357	4,417,896	13.39%
20	Wine, Fr Grape Nesoi & Gr Must W Alc, Nov 2 Liters	2,817,246	2,991,709	4,229,843	41.39%
21	Alaska Pollock, Frozen	7,246,145	6,858,114	3,869,472	-43.58%
22	Lobsters, Live, Fresh,Ch, Dried, Saltd Or In Brine	1,602,832	2,732,056	3,707,676	35.71%
23	Juice Of Single Fruit/Veg, Not Fortified Etc Nesoi	3,245,714	2,719,859	3,237,464	19.03%
24	Cherries, Fresh, Nesoi	2,134,204	2,990,893	3,114,470	4.13%
25	Cod, Frozen	4,224,465	1,580,148	2,836,861	79.53%
26	Jams, Fruit Jellies, Pastes Etc Nesoi, Nut Pastes	3,116,578	2,409,366	2,533,369	5.15%
27	Cheese, Nesoi, Including Cheddar And Colby	2,603,748	2,100,710	2,496,622	18.85%
28	Mixtures Of Fruit And/Or Vegetable Juices	2,159,865	2,178,986	2,482,537	13.93%
29	Tomato Paste Etc, Not Prepared With Vinegar Etc.	958,199	2,897,359	2,394,481	-17.36%
30	Bread, Pastry, Cakes, Etc Nesoi & Puddings	1,978,935	2,008,677	2,294,024	14.21%

No.	Product	2013	2014	2015	%Change
31	Cherries, Prepared Or Preserved, Nesoi	1,924,021	1,729,794	1,931,722	11.67%
32	Cheese Of All Kinds, Grated Or Powdered	782,330	979,432	1,889,098	92.88%
33	Meat Of Bovine Animals, Boneless, Frozen	1,446,681	1,399,530	1,816,840	29.82%
34	Chocolate & Othr Cocoa Preps, Not Bulk, Filled	1,612,682	2,456,124	1,758,981	-28.38%
35	Mixes & Doughs For Prep Of Bakers Wares Hdg 1905	2,654,015	2,346,619	1,750,642	-25.40%
36	Scallops Incl Queen, Frozen/Dried/Salted/In Brine	1,590,753	1,458,063	1,719,464	17.93%
37	Strawberries, Fresh	1,460,562	1,583,807	1,659,595	4.79%
38	Sugar, Nesoi, Including Invert Sugar & Syrup	1,392,845	1,449,877	1,595,734	10.06%
39	Coffee, Roasted, Not Decaffeinated	3,974,144	2,307,355	1,535,277	-33.46%
40	Cocoa Powder Cont Added Sugar Or Other Sweetening	722,274	960,771	1,475,106	53.53%
41	Cookies (Sweet Biscuits)	1,466,636	1,627,984	1,338,419	-17.79%
42	Meat Of Bovine Animals, Boneless, Fresh Or Chilled	800,295	1,368,810	1,261,920	-7.81%
43	Vegetable Fats & Oils/Fractions Hydrogenated Etc	1,474,365	1,137,339	1,193,083	4.90%
44	Potatoes, Prepared Etc. No Vinegar Etc, Not Frozen	1,467,807	1,073,081	1,161,429	8.23%
45	Albacore/Longfinned Tunas Ex Fillet/Lvr/Roe Frozen	563,030	564,935	1,146,102	102.87%
46	Nuts (Exc Peanuts) And Seeds, Prepared Etc. Nesoi	967,395	1,169,864	1,058,404	-9.53%
47	Peanuts, Prepared Or Preserved, Nesoi	758,223	832,916	1,029,195	23.57%
48	Citrus Fruit (Including Mixtures), Prep Etc Nesoi	1,371,413	1,204,961	969,406	-19.55%
49	Pacific, Atlantic And Danube Salmon Fillets Frozen	576,378	1,516,857	912,384	-39.85%
50	Chocolate & Othr Cocoa Preps, Not Bulk, Not Filled	1,218,289	692,847	879,800	26.98%
51	Grape Juice, Nesoi,Nt Fortified With Vitamins/Min	959,790	980,270	786,782	-19.74%
52	Vegt/Fruit/Nuts Etc Nesoi Prep/Pres By Vinegar Etc	1,008,571	774,516	759,824	-1.90%
53	Soups And Broths And Preparations Therefor	2,101,729	1,775,839	732,282	-58.76%
54	Walnuts, Fresh Or Dried, Shelled	498,063	764,610	729,975	-4.53%
55	Prunes, Dried	750,824	930,911	728,928	-21.70%
56	Prep Food, Swelling/Roasting Cereal/Cereal Product	1,291,319	817,815	716,209	-12.42%
57	Tomato Ketchup And Other Tomato Sauces	434,363	532,211	657,890	23.61%
58	Chocolate Prep Nesoi, In Blocks Etc. Over 2 Kg	375,122	474,167	653,875	37.90%
59	Orange Juice, Frozen, Sweetened Or Not	697,702	814,667	639,544	-21.50%
60	Dogfish And Other Sharks, Frozen	778,735	504,824	625,559	23.92%

No.	Product	2013	2014	2015	%Change
61	Homogenized Preps Of Meat, Meat Offal Or Blood	580,195	552,166	611,676	10.78%
62	Cranberries, Blueberries, Etc, Fresh	90,173	165,029	591,069	258.16%
63	Veg/Fruit/Nuts/Fruit-Peel Etc, Preserved By Sugar	537,363	863,264	584,406	-32.30%
64	Fish, Frozen, Nesoi	125,942	321,057	543,142	69.17%
65	Nonalcoholic Beverages, Nesoi	409,420	301,543	496,513	64.66%
66	Cheese, Processed, Not Grated Or Powdered	690,733	644,773	494,429	-23.32%
67	Oysters, Live, Fresh Or Chilled	302,032	355,204	448,199	26.18%
68	Oranges, Fresh	1,100,532	379,940	411,839	8.40%
69	Sausages, Similar Prdt Meat Etc Food Prep Of These	367,874	376,310	405,314	7.71%
70	Grape Juice Of A Brix Value <= 20, Nt Fort W/Vitam	416,818	430,632	362,741	-15.77%
71	Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	158,125	325,665	349,152	7.21%
72	Beer Made From Malt	171,975	259,518	329,471	26.95%
73	Vegetables Nesoi & Mixtures, Dried, No Furth Prep	150,551	242,549	299,697	23.56%
74	Lobsters, Including In Shell, Frozen	29,179	107,601	285,729	165.54%
75	Prepared Etc. Poultry Meat, Except Turkey, Nesoi	218,264	257,074	269,024	4.65%
76	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	254,146	537,343	263,397	-50.98%
77	Wine, Fr Grape Nesoi & Gr Must With Alc, Nesoi	424,642	720,691	254,612	-64.67%
78	Cranberry Juice Nt Fortified Unfermented No Spirit	217,420	195,252	202,821	3.88%
79	Peas, Dried Shelled, Including Seed	201,951	98,915	200,950	103.15%
80	Prepared Etc. Swine Meat, Offal, Etc. Nesoi	140,063	377,510	184,821	-51.04%
81	Soy Sauce	830,112	634,971	138,060	-78.26%
82	Shrimps And Prawns, Frozen, Nesoi	401,115	351,853	131,435	-62.64%
83	Fruit Nesoi & Nuts, Sweetened Etc Or Not, Frozen	75,459	49,718	121,186	143.75%
84	Almonds, Fresh Or Dried, In Shell	583,053	183,021	103,826	-43.27%
85	Orange Juice, Other Than Frozen, Sweetened Or Not	471,965	93,183	101,570	9.00%
86	Strawberries, Prepared Or Preserved Nesoi	224,485	180,685	99,551	-44.90%
87	Scallops Incl Queen Scallops, Live, Fresh, Chilled	165,510	112,068	87,587	-21.84%
88	Coffee Extracts/Essences/Concentrates & Prep	50,944	30,051	34,100	13.47%
89	Crabs, Raw (Live Etc), Cooked (Stm Etc) Not Frozen	9,659	10,019	32,538	224.76%
90	Lemons And Limes, Fresh Or Dried	267,375	213,347	10,790	-94.94%

No.	Product	2013	2014	2015	%Change
91	Sparkling Wine Of Fresh Grapes	333,754	44,261	8,853	-80.00%
92	Tunas/Skipjack/Bonito Prep/Pres Not Minced	2,850	8,113	4,523	-44.25%
93	Turkeys, Not Cut In Pieces, Frozen	829,896	672,079	-	-100.00%
94	Grapefruit Juice,Brix Value <=20,Nt Fort W Vitamin	95,595	22,863	-	-100.00%
95	Turkey Cuts And Edible Offal (Includ Liver) Frozen	1,257,235	1,087,548	-	-100.00%
Total		**863,168,271**	**533,493,327**	**487,143,108**	

Source: Global Trade Atlas

SECTION V: POST CONTACT AND FURTHER INFORMATION

The Foreign Agricultural Service in Bangkok maintains up-to-date information covering food and agricultural import opportunities in Thailand and would be pleased to assist in facilitating U.S. exports and entry to the Thai market. Questions or comments regarding this report should be directed to the Foreign Agricultural Service in Bangkok at the following local or U.S. mailing address:

Local:

Office of Agricultural Affairs
U.S. Embassy
120-122, Wireless Road
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