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Thailand

Food Service – Hotel, Restaurant, and Institutional Food Service (HRI)

2013

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Report Highlights:
TH4007: 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 is Southeast Asia's second largest economy with a GDP of $366 billion. In 2014, the Thai economy is forecast to grow between 4 to 5 percent driven by private consumption expansion, a revival of exports resulting from a stronger global economy, and substantial government spending on infrastructure projects. Foreign direct investment and tourism, which account for 5 to 10 percent of Thailand's economy, have stayed healthy despite the country's political challenges. However, prolonged or escalating protests could adversely affect the economy, foreign investment, tourism and delay public infrastructure projects.

Thailand's Key Economic Indicators (* in Billion)

	Actual Data		Projection		
			2013		2014
	2011	2012	19 Aug 13	18 Nov 13	18 Nov 13
GDP (at current price: Bil.USD)	346.0	366.0	400.0	391.0	399.0
GDP Growth (at constant price, %)	0.1	6.5	3.8-4.3	3.0	4.0-5.0
Investment (at constant prices, %)	3.3	13.2	6.0	0.9	7.1
Private (at constant prices, %)	7.2	14.4	4.0	0.7	5.8
Public (at constant prices, %)	-8.7	8.9	13.8	1.3	12.0
Consumption (at constant prices, %)	1.3	6.8	2.6	1.6	2.9
Private (at constant prices, %)	1.3	6.7	2.5	0.8	2.7
Public (at constant prices, %)	1.1	7.5	3.6	5.8	3.8
Export volume of goods&services (Volume, %)	9.5	3.1	7.4	4.8	7.0
Export value of goods (Bil.USD)	219.1	225.9	237.5	225.8	241.0
Growth rate (%)	14.3	3.1	5.0	-	7.0
Growth rate (Volume, %)	8.3	2.5	5.0	0.3	6.0
Import volume of goods&services (Volume, %)	13.7	6.2	7.2	3.4	6.2
Import value of goods (Bil.USD)	202.1	219.9	232.0	221.2	236.0
Growth rate (%)	24.9	8.8	6.5	0.6	6.7
Growth rate (Volume, %)	13.4	7.1	7.8	2.9	6.2
Trade balance (Bil.USD)	17.0	6.0	5.5	4.7	5.8
Current account balance (Bil.USD)	4.1	-1.5	1.2	-3.6	-2.5
Current account to GDP (%)	1.2	-0.4	0.3	-0.9	-0.6
Inflation (%)					
CPI	3.8	3.0	2.3-2.8	2.4	2.1-3.1
GDP Deflator	4.2	1.3	2.3-2.8	1.8	2.1-3.1
Source: Office of the National Economic and Social Development Board, 18 November 2013					

Thailand imported $632 million in consumer oriented foods from the United States in 2013 (Jan.-Nov.), up 73 percent from the previous year. 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. 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 2012, consumer expenditures on hotels and catering per capita were $401, a 7 percent increase from the previous year. The hotel and restaurant sector expanded by 15.1 percent in 2013 in line with the increase in number of tourist arrivals to Thailand. The numbers of inbound tourists were 6.7 million persons generating nearly $321 million baht. The number of inbound tourists from China, Laos, and Malaysia were the top three fast growing groups. Thailand's hospitality sector experienced growth with tourist arrivals reaching 22.3 million, up 16 percent from the previous year despite global economic challenges. The average occupancy rate increased to 62.5 percent compared with 57.5 percent in the same period in 2012. Growth in the country's tourism sector is expected to continue with the Tourism Authority of Thailand (TAT) forecasting 26.7 million visitors in 2013.

Thai Consumer Expenditure on Hotel and Catering 2008-2012 (US$ million)

Expenditure	**2008**	**2009**	**2010**	**2011**	**2012**
Catering	13,142	13,324	15,693	16,936	18,229
Accommodation	5,925	5,152	6,185	7,089	7,605
Total	19,067	18,476	21,878	24,025	25,834

Source: Euromonitor

Tourism Industry

Tourism is an important component of Thailand's economy, which generated approximately $38 billion in 2013. In general, the tourism industry has grown since the late 1990s. Thailand's HRI sector is reliant on the tourism industry, thus, the increase in tourist arrivals should bode well for growth in Thailand. 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 2009-2013 (visitors in thousands)						
Month	**2009**	**2010**	**2011**	**2012**	**2013**	**% Change 2013/2012**
January	1,270	1,606	1,806	1,992	2,318	16.38%
February	1,138	1,615	1,802	1,854	2,367	27.70%
March	1,237	1,439	1,702	1,896	2,322	22.51%
April	1,085	1,108	1,552	1,686	2,013	19.38%
May	924	827	1,407	1,547	1,846	19.36%
June	955	965	1,485	1,645	2,056	25.02%
July	1,095	1,276	1,720	1,816	2,224	22.47%
August	1,149	1,271	1,727	1,927	2,469	28.14%
September	1,041	1,215	1,486	1,612	2,056	27.59%
October	1,209	1,317	1,422	1,801	2,066	14.68%
November	1,362	1,479	1,292	2,144	2,399	11.93%
December	1,685	1,820	1,829	2,435	2,598	6.67%
Total	**14,150**	**15,936**	**19,230**	**22,354**	**26,736**	**19.60%**
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$6 billion in 2012. Tourists are staying in Thailand longer than in previous years with an average of about 10 days. Average spending per tourist is about 4,579 baht (US$147) per day with 19 percent spent on food and drinks, 31 percent on accommodations, 24 percent on shopping, 12 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 22.3 in 2012. Tourists from Asia and Europe make up over 80 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.

Number of International Tourists and Revenue Received (2007-2013)				
Year	No. of Tourists (Mil)	% Change 2013/2012	Revenue from Tourism (USD Mil)	% Change 2013/2012
2007	14,464,228	4.65%	15,868.53	13.57%
2008	14,584,220	0.83%	17,247.69	4.88%
2009	14,149,841	-2.98%	14,880.58	-11.19%
2010	15,936,400	12.63%	18,706.03	16.18%
2011	19,230,470	20.67%	25,458.09	30.94%
2012	22,353,903	16.24%	31,654.71	26.75%
2013	26,735,583	19.60%	38,127.28	19.09%

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. A total of 26.74 million visitors arrived in 2013 representing a 20 percent increase over 2012.

Number of International Tourists Arrivals: 2011-2013						
Country of Nationality	2011		2012		2013	
	Number	%share	Number	%share	Number	%share
East Asia	10,345,866	53.80%	12,525,214	56.03%	16,078,963	60.14%
Europe	5,101,406	26.53%	5,650,222	25.28%	6,307,503	23.59%
The Americas	952,519	4.95%	1,083,433	4.85%	1,170,642	4.38%
South Asia	1,158,092	6.02%	1,286,861	5.76%	1,346,462	5.04%
Oceania	933,534	4.85%	1,046,755	4.68%	1,040,420	3.89%
Middle East	601,146	3.13%	605,477	2.71%	627,435	2.35%
Africa	137,907	0.72%	155,941	0.70%	164,158	0.61%
Total	**19,230,470**	**100.00%**	**22,353,903**	**100.00%**	**26,735,583**	**100.00%**

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 16.09 million arrivals (up 28 percent), representing a 60 percent share of the overall tourism market to Thailand. Europe is the second largest market with 6.3 million visitors (12 percent increase), followed by South Asia at 1.34 million arrivals (4.63 percent growth), and the Americas at 1.17 million tourists (up 8.05 percent).

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). In 2012, Thailand welcomed a total of 1,013,502 overseas MICE visitors, up 13.21% compared to 2012. Revenue earnings were also up by 10.93% to 88.5 billion baht (US$2.9 billion), and accounted for about 10 percent of the country's tourism revenue.

It is estimated that revenues earned from international MICE travelers to Thailand will increase from US$2.9 billion in 2013 to US$3.7 billion by 2016, representing an average growth of 9 percent per annum. 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.

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 the first nine months of 2013, the six airports handled 65.3 million 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.

Six International Airports' Traffic Results

	Traffic Results (January - September, 2013)					
	Aircraft Movements			Passengers		
Airports	International	Domestic	Total	International	Domestic	Total
Suvarnabhumi	173,505	45,236	218,741	31,723,169	6,663,749	38,386,918
Don Mueang	30,989	73,227	104,216	3,981,633	8,027,017	12,008,650
Phuket	29,749	24,016	53,765	4,712,872	3,690,791	8,403,663
Hat Yai	1,243	11,656	12,899	164,331	1,731,990	1,896,321
Chiang Mai	5,914	25,147	31,061	574,837	3,309,312	3,884,149
Chiang Rai	260	4,730	4,990	9,265	757,416	766,681
Total	241,660	184,012	425,672	41,166,107	24,180,275	65,346,382

Source: The Airports of Thailand

Air Traffic (October 2012-September 2013)

Airports	Traffic Results (January - September, 2013)								
	Aircraft Movements			Passengers			Cargo (tonnes)		
	International	Domestic	Total	International	Domestic	Total	International	Domestic	Total
Suvarnabhumi	228,468	59,536	288,004	42,095,312	8,805,385	50,900,697	1,184,312	47,690	1,232,002
Don Mueang	39,745	96,243	135,988	5,059,378	10,503,375	15,562,753	8,474	8,864	17,338
Phuket	38,814	31,384	70,198	6,144,912	4,834,625	10,979,537	16,557	17,475	34,032
Hat Yai	1,762	15,294	17,056	226,821	2,238,549	2,465,370	-	13,795	13,795
Chiang Mai	7,368	33,927	41,295	726,128	4,446,614	5,172,742	185	18,266	18,451
Chiang Rai	362	6,520	6,882	12,026	1,041,837	1,053,863	-	4,565	4,565
Total	**316,519**	**242,904**	**559,423**	**54,264,577**	**31,870,385**	**86,134,962**	**1,209,528**	**110,655**	**1,320,183**

Source: The Airports of Thailand

Thailand’s six airports experienced higher volumes of air traffic in fiscal year 2012 (October 1, 2011-September 30, 2012) compared with the previous year. The air traffic volume resumed to normal growth following the floods that occurred during late October to November 2011. The Don Mueang International Airport was the hardest hit of all of Thailand’s airports. 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.

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 22.3 million in 2012 and despite the slowdown in the global economy, it still generated a record 31 billion baht, a 24 percent increase from 2011. The Tourism Authority of Thailand has set a 2014 target of 28.01 million international tourist arrivals with estimated revenues reaching 1.326 trillion baht, 13 percent increase from 2013.

	Q1/2011	Q2/2011	Q3/2011	Q4/2011	Q1/2012	Q2/2012	Q3/2012	Q4/2012
Number of Foreign Tourists (in thousands)	5,310.66	4,444.45	4,932.43	4,542.93	5,741.46	4,877.89	5,354.39	6,380.17
Hotel Occupancy Rate (percent)								
Total	64.69	51.81	56.89	56.03	66.42	54.84	57.54	64.84
Central (including Bangkok)	67.88	56.32	60.09	56.55	68.82	58.28	60.27	68.82
South	69.40	53.55	58.30	60.12	69.22	55.59	58.77	63.54
North	51.21	33.86	44.21	51.26	58.24	40.78	46.76	57.78
Northeast	48.77	45.58	47.35	44.79	49.68	48.35	49.24	47.20
Average Room Rate (Baht/room)								
Total	2,092.47	1,670.73	1,641.42	1,894.80	2,168.56	1,717.18	1,638.63	1,979.07
Central (including Bangkok)	1,959.64	1,772.50	1,778.83	1,798.08	2,024.98	1,808.45	1,707.19	1,891.28
South	3,220.59	1,995.96	1,835.23	2,664.83	3,313.77	2,028.81	1,940.98	2,732.74
North	1,173.44	1,139.24	1,055.92	1,404.56	1,261.94	1,139.36	1,134.41	1,455.28
Northeast	766.58	715.13	789.41	760.10	840.68	815.26	834.97	894.18
Share of Revenue Generated from Sales of Meeting/Seminar Package								
Total	21.39	18.08	20.76	16.74	17.60	20.48	21.43	19.00
Central (including Bangkok)	24.08	19.50	23.19	17.87	20.19	22.71	24.12	21.28
South	9.95	10.38	11.79	9.84	7.78	11.51	10.93	9.35
North	20.65	22.19	22.47	19.09	19.00	21.96	23.54	21.73
Northeast	44.36	27.38	29.96	28.63	29.29	31.91	33.44	30.22
Share of Foreign Tourists to Total Guests (percent)								
Total	67.51	61.89	63.29	61.13	69.90	62.69	64.24	70.17
Central (including Bangkok)	75.23	69.51	68.98	64.12	77.77	69.70	70.20	79.07
South	76.61	68.76	69.66	75.09	76.65	67.41	70.89	74.02
North	46.59	44.68	50.33	44.80	47.48	45.42	49.42	49.60
Northeast	14.33	10.40	11.55	11.54	15.52	13.95	12.66	13.81
Source: Bank of Thailand								

The hospitality business in 2014 is forecast to see a slight increase from 2013 as a result of positive economic conditions and the entry of new low cost airlines to Thailand, which is gaining popularity; particularly in the Don Mueang Bangkok international Airport. 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.

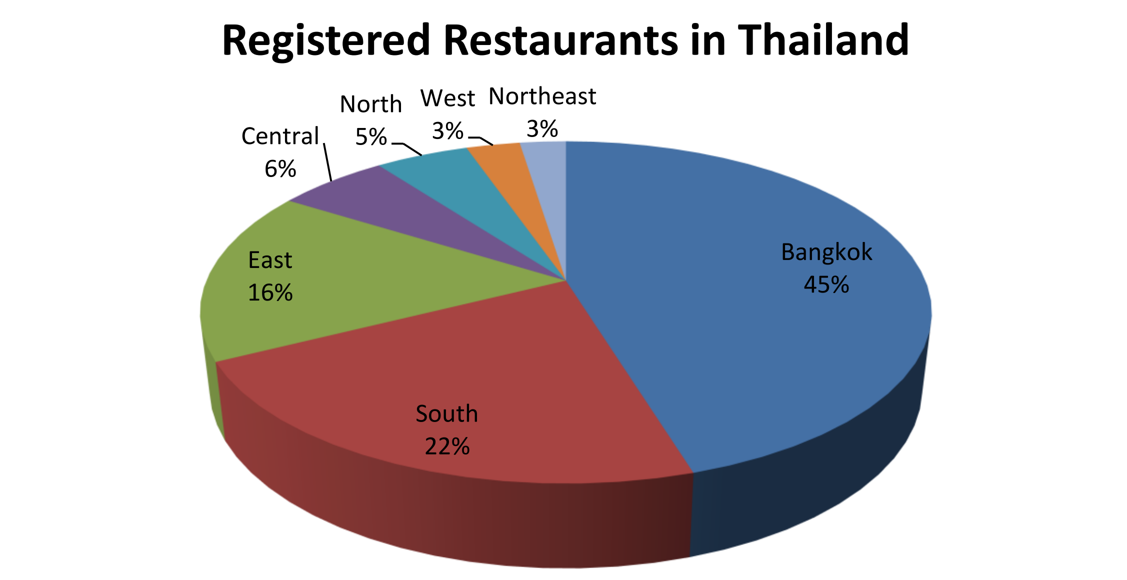
Average No. of Customers per Day Using the Hotel's Restaurant 2011					
Region and size of establishment	**Average number of customers per day**	**Thai**		**Foreigner**	
		Number	**%**	**Number**	**%**
Whole Kingdom	**301,022**	**136,762**	**45.4**	**164,260**	**54.6**
Fewer than 60 rooms	133,697	53,788	40.2	79,909	59.8
60-149 rooms	69,607	36,302	52.2	33,305	47.8
Over 150 rooms	97,718	46,672	47.8	51,046	52.2
Bangkok	**50,900**	**28,522**	**56**	**22,378**	**44.0**
Fewer than 60 rooms	3,120	834	26.7	2,286	73.3
60-149 rooms	13,780	7,530	54.7	6,250	45.3
Over 150 rooms	34,000	20,158	59.3	13,842	40.7
Central Region	**88,875**	**37,763**	**42.5**	**51,112**	**57.5**
Fewer than 60 rooms	41,017	19,777	48.2	21,240	51.8
60-149 rooms	19,924	8,290	41.6	11,634	58.4
Over 150 rooms	27,934	9,696	34.7	18,238	65.3
Northern Region	**33,493**	**21,961**	**65.6**	**11,532**	**34.4**
Fewer than 60 rooms	14,864	8,874	59.7	5,990	40.3
60-149 rooms	10,255	7,079	69	3,176	31.0
Over 150 rooms	8,374	6,008	71.7	2,366	28.3
Northeastern Region	**16,834**	**14,514**	**86.2**	**2,320**	**13.8**
Fewer than 60 rooms	4,372	3,885	88.9	487	11.1
60-149 rooms	9,197	7,850	85.3	1,347	14.7
Over 150 rooms	3,265	2,779	85.1	486	14.9
Southern Region	**110,920**	**34,002**	**30.7**	**76,918**	**69.3**
Fewer than 60 rooms	70,324	20,418	29	49,906	71.0
60-149 rooms	16,451	5,553	33.8	10,898	66.2
Over 150 rooms	24,145	8,031	33.3	16,114	66.7
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 will grow at least 10 percent in 2014. In addition, at least 5 billion baht ($125 million) will be invested on improving the standards and quality of recreational, meeting, and dining rooms. 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 2011 (in US$ Thousand)									
Region and size of establishment	Number of Hotels	Total	Receipts from Guest Room Sales Total	Online Sales	Receipts from Restaurant	Receipts from Entertainment	Receipts from Souvenir Shop	Receipts from Meeting/Seminar Room	Other Receipts
Whole Kingdom	**9,865**	**4,937,157.60**	**3,366,269**	**190,303**	**995,102**	**176,928**	**24,413**	**148,897**	**225,549**
Fewer than 60 rooms	8,014	1,638,364.79	1,269,622	81,739	243,410	29,073	16,029	15,878	64,352
60-149 rooms	1,306	1,080,005.01	766,489	39,907	194,308	37,297	2,249	32,514	47,147
Over 150 rooms	545	2,218,787.80	1,330,158	68,658	557,383	110,557	6,135	100,505	114,050
Bangkok	**683**	**1,087,155.34**	**682,602**	**27,893**	**244,350**	**66,114**	**2,168**	**40,905**	**51,016**
Fewer than 60 rooms	296	88,595.39	69,990	3,939	11,623	499	233	1,158	5,092
60-149 rooms	200	185,478.93	144,025	7,168	26,121	2,354	7	2,837	10,135
Over 150 rooms	187	813,081.03	468,588	16,786	206,605	63,261	1,928	36,910	35,789
Central Region	**2,406**	**1,110,008.78**	**805,739**	**29,264**	**198,252**	**22,709**	**4,110**	**37,534**	**41,667**
Fewer than 60 rooms	1,899	357,395.07	296,777	7,003	45,888	2,156	2,137	4,633	5,803
60-149 rooms	366	248,962.42	183,076	8,188	47,345	3,484	439	8,926	5,693
Over 150 rooms	141	503,651.28	325,885	14,073	105,019	17,068	1,533	23,975	30,171
Northern Region	**1,922**	**560,569.19**	**352,659**	**21,594**	**117,242**	**38,237**	**936**	**9,943**	**41,552**
Fewer than 60 rooms	1,647	209,833.90	152,766	12,431	34,308	2,381	493	1,154	18,733
60-149 rooms	220	145,559.03	93,126	6,130	24,290	16,205	443	4,358	7,138
Over 150 rooms	55	205,176.26	106,767	3,034	58,645	19,651	0	4,432	15,682
Northeastern Region	**1,151**	**281,364.09**	**197,330**	**9,853**	**36,413**	**15,334**	**581**	**27,654**	**4,053**
Fewer than 60 rooms	981	106,890.29	92,758	272	6,827	1,604	140	4,983	579
60-149 rooms	143	95,258.37	62,203	588	11,892	8,619	143	11,210	1,192
Over 150 rooms	27	79,215.42	42,369	8,993	17,693	5,111	299	11,461	2,283
Southern Region	**3,703**	**1,898,060.20**	**1,327,940**	**101,700**	**398,846**	**34,535**	**16,619**	**32,861**	**87,261**
Fewer than 60 rooms	3,191	875,650.14	657,331	58,094	144,763	22,432	13,027	3,950	34,146
60-149 rooms	377	404,746.26	284,060	17,833	84,661	6,635	1,217	5,184	22,990
Over 150 rooms	135	617,663.80	386,548	25,772	169,422	5,467	2,375	23,727	30,125
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 15.1 percent in the third quarter of 2013, 14.2 percent higher than in the previous quarter. There are 8,450 restaurants registered with the Ministry of Commerce (as of November 30, 2013). Estimated sales in this sector totaled an estimated US$4.7 billion in 2012, 23 percent higher than the previous year.



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 are increasingly influencing 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.

Market Share of Western Casual Dining in Thailand

	2010		2011		2012	
(US$ Million)	**Revenue**	**(%)**	**Revenue**	**(%)**	**Revenue**	**(%)**
Café	78	7%	102	8%	117	8%
Restaurants	547	51%	639	49%	718	48%
Fast Food	355	33%	447	34%	520	35%
Ice Cream & Bakery	100	9%	128	10%	143	10%
Total	1,080	100%	1,316	100%	1,499	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 comprise of an increasingly 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 market. It is estimated that the QSR market will grow to reach nearly US$1.5 billion at the end of 2015.

The QSR market is mainly dominated by franchise businesses (90 percent), which primarily sell chicken (35 percent), burgers (16 percent), pizzas (18 percent), ice cream (12 percent), and others (19 percent). Examples of QSRs currently operating in Thailand are KFC, McDonalds, the Pizza Company, Pizza Hut, Burger King, Dairy Queen, A&W, Chester's Grill, Subway, Auntie Anne's, Baskin Robbins, Sizzler, Swensen's, etc. The QSR sector in Thailand has recently encountered challenges from consumers that have trended towards eating more healthy products as they perceive fast food products as less nutritious than ordinary Thai food. 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 (2011)
(US$ Million)

	2009		2010		2011	
Revenue	**Revenue**	**(%)**	**Revenue**	**(%)**	**Revenue**	**(%)**
Chicken	268	32%	340	34%	383	35%
Hamburger	136	16%	161	16%	179	16%
Pizza	154	18%	182	18%	200	18%
Ice Cream	107	13%	120	12%	132	12%
Others	171	20%	190	19%	214	19%
Total	**836**	**100%**	**993**	**100%**	**1,108**	**100%**

Source: Ministry OF Commerce and industry estimates

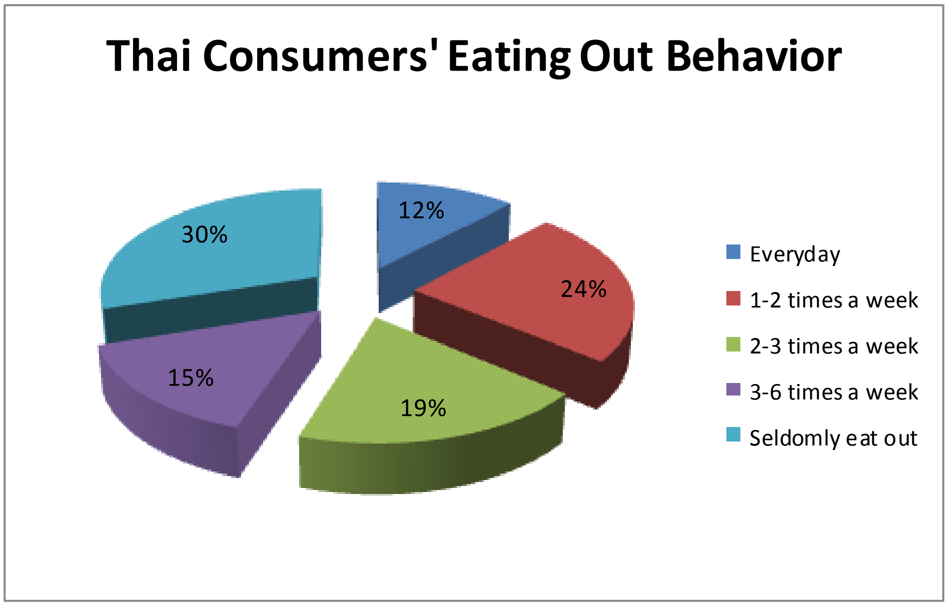
2. International/High-end Restaurants have the highest growth in the restaurant sector with a total market value of more than US$500 million. This segment represents about 10 percent of the restaurant industry. In Thailand, Japanese restaurants are ranked number one in terms of consumer preference, followed by Italian, Chinese, American, and Vietnamese.

Sales of Full Service Restaurant and Casual Dining (US$ million)						
Restaurant	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**
Casual Dining	493	592	664	652	744	787
Pizza Full Service Restaurant	94	114	118	107	109	106
Other Full Service Restaurant	3,369	4,003	4,358	4,276	4,573	4,672
- Asian Full Service Restaurants	2,648	3,128	3,391	3,320	3,547	3,619
- European Full Service Restaurants	90	110	124	122	132	144
- North American Full Service Restau	173	199	217	221	242	246
- Other Full Service Restaurant	458	565	626	613	652	663
Total Full Service Restaurants	**3,462**	**4,117**	**4,476**	**4,383**	**4,682**	**4,778**
Chained Full Service Restaurants	686	937	1,107	1,175	1,343	1,452
Independent Full Service Restaurants	2,777	3,180	3,369	3,208	3,340	3,326
Total Full Service Restaurants	**3,462**	**4,117**	**4,476**	**4,383**	**4,682**	**4,778**
Total Restaurants	**3,955**	**4,709**	**5,140**	**5,035**	**5,426**	**5,565**
Source: Euromonitor						

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 decreased, 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 helps encourage Thais to eat out more and as a result has pushed 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. 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 2008-2012					
(million; US$)	2008	2009	2010	2011	2012
Non-Alcoholic Beverages	5,138	5,323	6,341	7,080	7,835
Coffee, Tea, and Cocoa	1,037	1,128	1,395	1,576	1,729
Mineral Waters, Soft Drinks, Fruit and Vegetable Juices	4,100	4,195	4,946	5,505	6,107
Alcoholic Beverages	5,108	4,587	5,019	5,163	5,126
Wine	2,319	2,250	2,437	2,533	2,480
Spirits	142	138	161	180	221
Beer	2,647	2,199	2,421	2,451	2,424
Source: Euromonitor and USDA Foreign Agricultural Service - Bangkok, Thailand					

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

- 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 64 million at the end of 2012. 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. About 47 million Thais are between 15-64 years old (72%).
- Given the economic importance of the HRI sector in Thailand, opportunities abound for U.S. products;
- Literate population due to comprehensive schooling, increased overseas studies, international travel, access to the internet and cable TV;
- Over 10 percent of total population live 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;
- 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 (36 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 policy and actions try to increase demands for Thai local products.
- A wide range of restaurants and menus to meet demands of tourists requires a wide variety of products.	- Very high import tariffs on high value consumer food and beverage products, especially U.S. meat products, wine, whiskies, cherries, peaches, plums, pears, French fries, etc.

- Thai importers prefer to deal with reliable U.S. suppliers who are able to supply products at competitive prices.	- Lack of trader and consumer awareness of U.S. products, while marketing costs to increase consumer awareness are high.
- Thailand's beneficial geographical location is viewed as a gateway to the larger Indochina and other Asian markets.	-Due to the high import tariffs on U.S. products, most Thai importers have shifted to import less expensive products from other Asian countries, especially Australia, China, Malaysia, Singapore, etc.

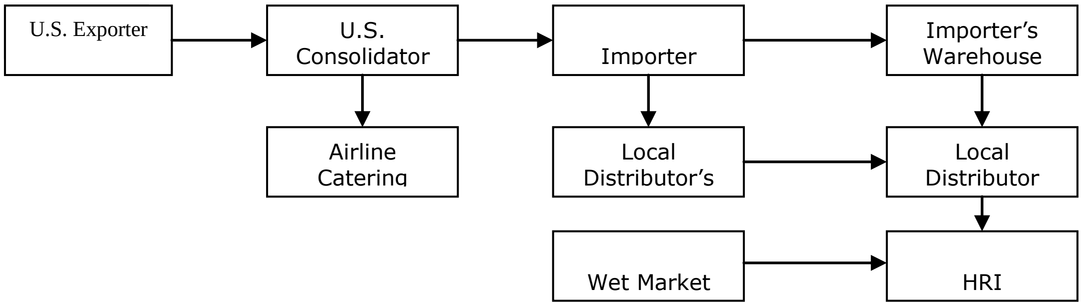
Food Show in Thailand

World of Food Asia 2014
Date: May 21-25, 2014
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) 2014
Date: September 10-13, 2014
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 (radish, celery, carrots, apples, grapes, cherries, kiwi fruit, avocados, blueberries, grapefruit, oranges).

  Jams, jellies, and spreads.

Import Statistic of U.S. Products for Food Service Sector 2010-2012 (US$)

No.	Product	2010	2011	2012	%Change
1	Skipjack Tunas Except Fillets, Livers, Roes, Frozn	133,012,779	184,902,085	151,970,004	-17.81%
2	Food Preparations Nesoi	92,693,972	117,508,386	140,168,488	19.28%
3	Yellowfin Tuna Except Fillets, Liver & Roes Frozen	22,087,102	21,759,074	40,449,042	85.90%
4	Milk and Cream, Cntd,Swt,Powdr, Gran/Solids,Nov 1.5% Fat	29,974,198	32,671,844	21,378,448	-34.57%
5	Apples, Fresh	16,386,947	18,443,677	20,622,122	11.81%
6	Malt Extract; Flour, Meal, Milk Etc Prod Etc Nesoi	5,007,631	24,227,040	20,326,768	-16.10%
7	Sardines, Sardinella, Brisling Or Sprats, Frozen	-	-	19,749,351	
8	Grapes, Fresh	11,925,312	15,217,914	18,416,165	21.02%
9	Potatoes, Prepared Etc., No Vinegar Etc., Frozen	11,611,839	13,105,976	12,873,999	-1.77%
10	Almonds, Fresh Or Dried, Shelled	6,855,306	6,956,118	8,878,295	27.63%
11	Alaska Pollock, Frozen	-	-	8,668,596	
12	Shrimps And Prawns, Frozen, Nesoi	-	-	4,891,358	
13	Sauces Etc. Mixed Condiments And Seasonings Nesoi	3,676,250	4,669,428	4,877,598	4.46%
14	Pistachios, In Shell, Fresh Or Dried	-	-	4,638,780	
15	Albacore/Longfinned Tunas Ex Fillet/Lvr/Roe Frozen	1,380,338	3,165,857	4,620,663	45.95%
16	Cod, Frozen	-	-	4,315,660	
17	Edible Fats & Oil Mixtures & Prepar Nesoi, Etc	4,849,554	4,200,357	4,272,797	1.72%
18	Cocoa Preparations, Not In Bulk Form, Nesoi	1,910,002	2,620,764	3,567,778	36.14%
19	Tea Or Mate Extracts/Essences/Concentrates & Preps	4,038,718	3,355,550	3,142,435	-6.35%
20	Raisins	2,196,991	2,933,356	3,056,380	4.19%
21	Cherries, Fresh, Nesoi	-	-	2,864,507	
22	Coffee, Roasted, Not Decaffeinated	1,809,414	3,272,498	2,857,002	-12.70%
23	Jams, Fruit Jellies, Pastes Etc Nesoi, Nut Pastes	4,323,733	3,705,907	2,815,579	-24.02%
24	Juice Of Single Fruit/Veg, Not Fortified Etc Nesoi	-	-	2,802,513	
25	Wine, Fr Grape Nesoi & Gr Must W Alc, Nov 2 Liters	1,042,909	1,590,844	2,735,935	71.98%
26	Soups And Broths And Preparations Therefor	2,519,929	2,468,764	2,696,747	9.23%
27	Mixes & Doughs For Prep Of Bakers Wares Hdg 1905	706,547	1,835,329	2,277,106	24.07%
28	Potatoes, Prepared Etc. No Vinegar Etc, Not Frozen	1,052,631	1,575,109	2,253,669	43.08%
29	Sockeye Salmon, Excl Fillet, Livers & Roes, Frozen	6,325,003	2,756,563	2,108,098	-23.52%
30	Cherries, Prepared Or Preserved, Nesoi	2,165,965	2,245,103	2,064,153	-8.06%

No.	Product	2010	2011	2012	%Change
31	Bread, Pastry, Cakes, Etc Nesoi & Puddings	1,134,987	1,543,273	2,038,176	32.07%
32	Sugar, Nesoi, Including Invert Sugar & Syrup	2,884,470	1,658,594	2,034,862	22.69%
33	Pacific Salmon, Nesoi, Excl Filet, Liver,Roe, Froz	20,016,472	27,167,564	2,026,952	-92.54%
34	Scallops Incl Queen, Frozen/Dried/Salted/In Brine	598,467	1,271,671	1,917,066	50.75%
35	Mixtures Of Fruit And/Or Vegetable Juices	6,257,019	3,063,119	1,613,626	-47.32%
36	Cheese, Nesoi, Including Cheddar And Colby	372,350	823,763	1,602,819	94.57%
37	Citrus Fruit (Including Mixtures), Prep Etc Nesoi	699,845	1,554,789	1,543,124	-0.75%
38	Fish Meat, Frozen, Except Steaks And Fillets Nesoi	350,804	3,199,032	1,523,643	-52.37%
39	Chocolate & Othr Cocoa Preps, Not Bulk, Filled	593,724	716,154	1,441,859	101.33%
40	Grape Juice, Nesoi,Nt Fortified With Vitamins/Min	1,444,057	931,134	1,387,389	49.00%
41	Vegetable Fats & Oils/Fractions Hydrogenated Etc	1,034,257	1,577,260	1,244,711	-21.08%
42	Strawberries, Fresh	1,047,420	1,290,573	1,208,185	-6.38%
43	Prep Food, Swelling/Roasting Cereal/Cereal Product	1,077,196	1,174,348	1,155,192	-1.63%
44	Vegt/Fruit/Nuts Etc Nesoi Prep/Pres By Vinegar Etc	1,414	795,901	1,148,424	44.29%
45	Cookies (Sweet Biscuits)	915,649	1,076,508	1,125,865	4.58%
46	Cheese Of All Kinds, Grated Or Powdered	753,614	666,662	950,461	42.57%
47	Leguminous Vegetables Nesoi, Dried Shell, Inc Seed	107,945	533,660	939,640	76.07%
48	Nuts (Exc Peanuts) And Seeds, Prepared Etc. Nesoi	978,635	635,184	929,437	46.33%
49	Meat Of Bovine Animals, Boneless, Frozen	249,424	280,828	842,969	200.17%
50	Prunes, Dried	763,205	650,655	834,386	28.24%
51	Orange Juice, Frozen, Sweetened Or Not	563,270	878,687	832,686	-5.24%
52	Oranges, Fresh	255,447	794,317	831,345	4.66%
53	Cocoa Powder Cont Added Sugar Or Other Sweetening	525,294	1,140,388	826,374	-27.54%
54	Peanuts, Prepared Or Preserved, Nesoi	343,353	451,192	802,764	77.92%
55	Sparkling Wine Of Fresh Grapes	230,236	721,363	773,023	7.16%
56	Lobsters, Live, Fresh,Ch, Dried, Saltd Or In Brine	399,710	300,604	760,200	152.89%
57	Walnuts, Fresh Or Dried, Shelled	445,319	456,132	740,860	62.42%
58	Pacific, Atlantic And Danube Salmon Fillets Frozen	-	-	729,515	
59	Tunas/Skipjack/Bonito Prep/Pres Not Minced	42,614	190,752	703,654	268.88%
60	Fish, Frozen, Nesoi	-	-	665,260	

No.	Product	2010	2011	2012	%Change
61	Tomato Paste Etc, Not Prepared With Vinegar Etc.	136,673	561,491	656,700	16.96%
62	Dogfish And Other Sharks, Frozen	-	-	641,068	
63	Turkeys, Not Cut In Pieces, Frozen	263,539	567,086	625,480	10.30%
64	Veg/Fruit/Nuts/Fruit-Peel Etc, Preserved By Sugar	458,632	636,602	622,915	-2.15%
65	Soy Sauce	787,422	1,063,917	582,503	-45.25%
66	Cheese, Processed, Not Grated Or Powdered	64,318	583,506	571,829	-2.00%
67	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	193,283	207,787	567,454	173.09%
68	Leguminous Veg Raw/Cooked By Boiling, Frozen Nesoi	-	-	543,071	
69	Homogenized Preps Of Meat, Meat Offal Or Blood	153,995	367,400	531,858	44.76%
70	Tomato Ketchup And Other Tomato Sauces	466,830	496,471	500,078	0.73%
71	Meat Of Bovine Animals, Boneless, Fresh Or Chilled	324,892	351,463	490,366	39.52%
72	Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	1,613,275	1,001,653	471,160	-52.96%
73	Almonds, Fresh Or Dried, In Shell	1,435,372	518,928	468,101	-9.79%
74	Vegetables Nesoi & Mixtures, Dried, No Furth Prep	582,887	497,823	447,960	-10.02%
75	Chocolate & Othr Cocoa Preps, Not Bulk, Not Filled	1,070,975	580,371	430,830	-25.77%
76	Chocolate Prep Nesoi, In Blocks Etc. Over 2 Kg	240,155	332,335	407,669	22.67%
77	Fruit Nesoi & Nuts, Sweetened Etc Or Not, Frozen	5,096,996	33,152	396,369	1095.61%
78	Scallops Incl Queen Scallops, Live, Fresh, Chilled	449,564	177,179	391,135	120.76%
79	Orange Juice, Other Than Frozen, Sweetened Or Not	1,055,396	484,096	390,798	-19.27%
80	Beer Made From Malt	147,399	114,011	376,528	230.26%
81	Crabs, Raw (Live Etc), Cooked (Stm Etc) Not Frozen	11,237	1,627	375,356	22970.44%
82	Prepared Etc. Poultry Meat, Except Turkey, Nesoi	525,714	482,577	356,230	-26.18%
83	Grape Juice Of A Brix Value <= 20, Nt Fort W/Vitam	476,959	377,968	347,800	-7.98%
84	Lemons And Limes, Fresh Or Dried	94,000	98,905	344,213	248.02%
85	Sausages, Similar Prdt Meat Etc Food Prep Of These	292,745	386,093	342,800	-11.21%
86	Wine, Fr Grape Nesoi & Gr Must With Alc, Nesoi	69,743	176,274	340,692	93.27%
87	Sole, Except Fillets, Livers And Roes, Frozen	1,103	-	336,532	#DIV/0!
88	Cranberry Juice Nt Fortified Unfermented No Spirit	-	-	334,640	#DIV/0!
89	Nonalcoholic Beverages, Nesoi	188,726	571,369	304,117	-46.77%
90	Grapefruit Juice,Brix Value <=20,Nt Fort W Vitamin	148,177	230,790	289,752	25.55%

No.	Product	2010	2011	2012	%Change
91	Coffee Extracts/Essences/Concentrates & Prep	167,699	187,183	278,834	48.96%
92	Lobsters, Including In Shell, Frozen	-	20,455	228,409	1016.64%
93	Crabs, Including In Shell, Frozen	718,258	1,234,150	211,294	-82.88%
94	Oysters, Live, Fresh Or Chilled	-	-	206,496	
95	Pistachios, Shelled, Fresh Or Dried	-	-	191,338	
96	Strawberries, Prepared Or Preserved Nesoi	95,931	151,037	188,389	24.73%
97	Turkey Cuts And Edible Offal (Includ Liver) Frozen	197,675	559,945	180,804	-67.71%
98	Prepared Etc. Swine Meat, Offal, Etc. Nesoi	71,878	135,875	179,850	32.36%
99	Cranberries, Blueberries, Etc, Fresh	9,572	14,551	173,646	1093.36%
100	Peas, Dried Shelled, Including Seed	84,464	309,046	171,305	-44.57%
	Total	**429,340,781**	**544,250,799**	**577,036,908**	

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:	**U.S. Mail**:
Office of Agricultural Affairs U.S. Embassy 120-122, Wireless Road Bangkok 10330 Tel. +662-205-5106 Fax. +662-255-2907 Email: Agbangkok@fas.usda.gov Web site: www.fas.usda.gov	Office of Agricultural Affairs U.S. Embassy, Box 41 APO AP 96546

End of the Report.