

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Thailand

### Retail Foods

### 2016

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**Report Highlights:**

At a value of \$84.31 billion, Thailand's total retail sales grew 3-5 percent in 2015, representing approximately 25 percent of total GDP. Total grocery retail sales reached \$52.56 billion. Overall retail sector growth was 4 percent in 2015 and is estimated to be at least 4 percent in 2016.

**Post:**

Bangkok

**Executive Summary:**

Thailand's Gross Domestic Production (GDP) grew an average of 3.5 percent between 2012-2015. The Office of the National Economic and Social Development Board (NESDB) and the Bank of Thailand forecast that GDP will grow at a rate of 3.2 percent in 2016. The recent global economic downturn has led to lower exports and has caused several industries such as automobiles, advertising, and the broadcast media to reduce their operations and lay off employees. In response, Prime Minister Prayuth Chan-ocha and his government have implemented various policies to boost domestic consumption and spending. Additionally, the number of inbound tourists is expected to grow generating additional income for Thailand.

Thailand's total retail consumption is about 25 percent of total GDP. Total retail sales and total food retail sales (grocer retailers) in 2015 are valued respectively at \$84.31 billion and \$52.56 billion dollars. The Office of the National Economic and Social Development Board (NESDB) and the Bank of Thailand estimate that about 25 million tourists with total income receipts of approximately \$38 billion visited Thailand during the first three quarters of 2016.

In 2015, Thailand's total consumer-oriented agricultural product imports were valued at \$4.3 billion, with the United States enjoying a 10 percent market share. Imports of U.S. consumer-oriented agricultural products have grown 29 percent since 2010 to reach a total value of \$408.9 million.

**Thailand Country Fact file:**

Area: 514,000 square kilometers (sq.km.)

Population: 68.8 million

**Demographic and Economic Indicators**

	2012	2013	2014	2015	2016
Inflation (% change)	3.0	2.2	1.9	-0.9	0.2
Exchange rate (per US\$)	31.08	30.72	32.49	34.25	34.84
GDP (% real growth)	7.4	2.8	0.9	2.8	3.2
GDP (Baht millions)	12,349,026	12,901,498	13,132,234	13,533,596	14,034,000
GDP (US\$ millions)	397,294	420,021	404,241	395,062	398,000
Per Capita Income (US\$)	5,719	5,920	5,733	n.a	n.a
No. of households ('000)	21,302	21,740	22,147	22,523	n.a
Urban population ('000)	31,341	32,325	33,289	34,219	n.a
Urban population (%)	46.7	47.9	49.2	50.4	n.a
Population aged 15-64 (%)	72.0	72.0	71.9	71.8	n.a
Population aged 65+ (%)	9.4	9.8	10.1	10.5	n.a
No. of tourists (millions) 1/	22.4	26.7	24.8	29.9	24.8 (Jan-Sept)
Tourism receipts	31,660	39,295	35,323	42,545	37,990

(US\$ millions) 1/					(Jan-Sept)
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Source: Euro monitor International

1) Office of the National Economic and Social Development Board (NESDB)

The Thai economy is expected to grow by 3.2 percent in 2016, compared to 2.8 percent growth in the previous year. According to the Thai Office of the National Economic and Social Development Board (NESDB) and Bank of Thailand reported per capita income was \$5,733 in 2014, an increase of 4.7 percent from 2011. The Euro monitor reported consumer expenditure per capita to be 114,944 Baht (US\$3,355) in 2015. In 2016, consumer expenditures are expected to increase by 2.7 percent, with education and communications seeing the sharpest rise in spending. Disposable income per capita totaled US\$3,166 in 2015. In 2016, growth of 2.3 percent is forecast in real terms, which could directly impact Thailand's retail and food service sectors. During the period 2015-2030, total disposable income will increase by a cumulative value of 58.7 percent in real terms – growing at an average annual rate of 3.1 percent.

## Retail Sector

Thailand represents one of the most attractive food and drink markets in the Asia Pacific region. Overall the retail sector expanded about 3-5 percent and it is estimated growth will be at least 4 percent in 2016. Changing Thai consumer lifestyles and a growing urban population offer modern retailers many opportunities. The retail market continues to expand rapidly, not only in the Bangkok area. In every big city there are new retail developments being constructed ranging from small stores to community mall-sized retail establishments. The retail food market structure continues to evolve to encompass hypermarkets, supermarkets, cash and carry, and convenience stores. The latter is continuing to gain market share while traditional retailers gradually decline. Modern food retailing accounts for approximately 70 percent of total retail sales as the flow of local shoppers has been diverted from wet markets and grocery stores to hypermarkets and supermarkets. These changes began in 2000 when Thailand's retail sector experienced an increase in new investments from both local and foreign players, which has made Thailand the second most dynamic retail market in Asia after China. The majority of these investments have come from the leading international retail chains such as hypermarket UK-based Tesco with its Tesco Lotus stores, Big C Supercenter of Casino Group of France (acquired by Thai tycoon Mr. Charoen Sirivadhanabhakdi of TCC Group in 2016, and cash and carry Netherlands-based Siam Makro acquired by Thai tycoon Mr. Dhanin Chearavanont of CP Group in August 2013. Locally run supermarkets and convenience stores have also increased in numbers; including stores such as Villa Market, Tops Marketplace, Foodland Supermarket, 7-Eleven, Home Fresh Mart and Gourmet Market by the Mall Group. On October 1, 2016, the Mall group opened the Hua Hin store (200,000 square meter Blue Port Hua Hin) to serve incoming tourists. Sales for the first year are being estimated at 7,000 million baht. Thailand is an important tourist destination with 23 million visitors to Bangkok, 13 million to Phuket, 10 million to Pattaya, 6 million to Hua Hin, and 5 million to Chiangmai.

CP All continues to aggressively expand the number of its outlets throughout the nation. Tesco-Latus by Ek-Chai Distribution System enjoys a wide variety of formats from the largest hypermarket to the smallest selling spaces of convenience stores. Big C Supermarket PCL was acquired by Carrefour in 2010 and continues to promote its grocery businesses aggressively through various business models from hypermarkets to convenience stores. Central Retail also has a strong presence in many retail

categories such as department stores, supermarkets, and convenience specialty stores that focus on coffee, wine, cheese, and beauty. In general, despite acquisitions, the top four companies have continued to hold the same ranking during 2011-15, with 7-Eleven leading in sales value, followed by Tesco-Lotus, Central Retail and Big C.

Although supermarkets have a fewer number of outlets compared to larger hypermarkets, their influence on the lifestyles of urbanized Thais, expatriates, and upper-income communities has been significant.

These companies, particularly because of the market segment they focus on, offer excellent opportunities for U.S. exporters of consumer food items. The Max Valu supermarket chains are owned by the Japanese corporation AEON, while Tops and Home Fresh Mart are owned by the Thai group, Central Retail and The Mall Co., Ltd. Foodland Supermarket caters to local Thais. Villa Market carries a wide range of imported goods and caters to foreigners, particularly western expatriates. UFM Fuji supermarket caters to Japanese expatriates in Thailand and provides a wide range of imported Japanese products. Foodland, Villa, and UFM Fuji are owned by Thai operators, in spite of their foreign positioning.

As a result of government zoning and regulations and limited prime areas for development, the rate of new retail store openings in the center of Bangkok has slowed. However, retailers have increased investments in new retail outlets in rural areas. These new stores are being customized to serve consumers' behaviors and income in each province.

Thailand's retail sector employs approximately 5 to 6 percent of the total population. Average annual total retail sales growth ranged from 3 to 6 percent from 2012-2015. In 2015, Thailand's retail sales totaled more than \$84 billion, which consisted of 60 percent food spending and the remaining 40 percent on non-food items; an increase of 4.7% percent from the year before.

Retailers are utilizing various marketing or promotion events to encourage spending such as buy 1 get 1 free promotions, 5-10 percent discount coupons, enlarged shopping areas for ready-to-eat or take home meals. High end retailers are looking for healthier food items, gluten free food and less chemically-enhanced foods to serve health-conscious customers. This food category represents about 1 percent of total retail food sales.

### Retail Sales in 2011-2015

	2011	2012	2013	2014	2015
Total Retail Sales	\$78.79 billion (2,402.2 billion baht)	\$81.88 billion (2,544.9 billion baht)	\$87.12 billion (2,679.2 billion baht)	\$84.85 billion (2,756.9 billion baht)	\$84.31 billion (2,888.4 billion baht)
Non-Food Retail Sales	\$29.52 billion (37.5%)	\$30.30 billion (37.0%)	\$32.41 billion (37.2%)	\$31.68 billion (37.3%)	\$31.75 billion (37.7%)
Food Retail Sales (Grocery Retailers)	\$49.27 billion (62.5%)	\$51.58 billion (63.0%)	\$54.71 billion (62.8%)	\$53.17 billion (62.7%)	\$52.56 billion (62.3%)

Consumption expenditure of households 1/	\$155.65 billion	\$165.19 billion	\$173.10 billion	\$163.11 billion	\$161.76 billion
Percentage of food retail sales on consumption expenditure 1/	31.65 %	31.22%	31.61%	32.59%	32.49%

Source: Euro monitor International

1) Office of the National Economic and Social Development Board (NESDB)

## Retail Food Sector

Over the past decade, Thailand’s retail food sector has been one of the fastest-growing in the world. This sector has diverse store layouts ranging from wet markets to hypermarkets. The retail food business is classified into two models: traditional and modern. The modern retail establishments utilizes standardized management systems, point of sales, new technology, and are located in densely populated areas while the traditional retailers/operators consist of mom and pop stores, street vendors and wet markets that are commonly found in the rural areas. These stores are usually smaller establishments operated by local family owners.

In 2015, total food retail sales from organized retail chain stores (modern trade retail) reached a value of approximately \$52.56 billion or 62.3 percent of total retail sales. Convenience stores showed the biggest number of outlets (13,322) followed by supermarkets (463) and supercenter/hypermarkets (376).

Competition in the retail food business is expected to remain intense. Most investments will aim to improve and modernize existing stores, as well as develop store formats that are suited for urban areas and consumer preferences. Many retailers have shown interest in smaller-sized stores, which can better reach communities and serve the needs of new consumers who like to shop near their homes or communities, such as condominium projects. It is projected that competition in the retail food business will be more in the form of innovative channels that meet consumer demand. In addition, retailers will continue to maintain a focus on being able to more effectively serve its core customer base through strategic initiatives that include store layout enhancements, expansions, and improving product assortments that are in line with market demand trends. According to Euro monitor, “non-store retailing which includes vending, home shopping, internet retailing (includes internet pure play retailers, mobile internet retailing), and direct selling totaled approximately \$4 billion or 4 percent of the total retail sales in 2015. Of the non-store retail sales, the Internet sales grew (174.2 percent) during the last 5 years and continued to grow (30 percent) in 2014/2015. Euro monitor reports that increased use of smartphones and tablets has boosted sales as consumers can check out product reviews and new arrivals instantly. According to the Thailand Digital Advertising Association, there were 26 million internet users in the country in 2015. More retailers have launched their own mobile applications “apps”, primarily for marketing purposes, promoting products and directly communicating with consumers.

### Number of Stores by Retail Channel Type (2012-2015)

	2012	2013	2014	2015
Supercenter/Hypermarket	297	311	340	376
Supermarket	266	359	432	463

Convenience Store	10601	11632	12559	13322
Department Store	53	61	69	74
Drug Store/Health & Beauty	n/a	980	1146	1249

Source: Thai Retailers Association

Outlet expansions in Bangkok and nearby vicinities have slowed over the years due to the lack of prime land availability and zoning laws. As a result, the ratio of the number of retail outlets being developed in rural areas compared to Bangkok and nearby suburbs has increased from 40:60 in 2010 to 45:55 in 2015. As part of this trend, new department stores will focus on establishing new locations in rural areas and in border areas shared with other ASEAN Economic Community-member countries to capitalize on the establishment of the ASEAN Economic Community.

### Summary of Retailer Categories and Goals/Strategies

Goal/Strategy	Hypermarket	Cash and Carry	Supermarket	Convenience Store
Type of products sold	Variety, middle quality goods	Variety, middle quality goods	Variety, usually premium products	Variety
Target customers	Middle and low-income customers	Small retailers, customers who buy in bulk and HRI	All income types	Customers who want convenience
Management of goods in inventory	30-45 days	1 month	10-15 days	15-20 days
Price Strategy	As low as possible	Wholesale price	Daily price	Higher prices than supermarkets
Other strategies	Membership card, credit cards, aggressive expansion of outlets, and frequent discounts	Membership card	Membership card. Promotions and discounts	Aggressive expansion of outlets
Retail sales area (sqm)	4,000-12,000	5,500-12,000	1,000-3,000	16-100

Source: Thai Development Research Institute

### Standard Opening Hours by Retail Channel Type 2015

Channel	Monday-Thursday	Friday	Saturday	Sunday
Supercenter/Hypermarket	6 am – 9 pm	6 am – 9 pm	6 am – 9 pm	6 am – 10 pm
Supermarket	7 am – 9 pm	7 am – 9 pm	7 am – 9 pm	7 am – 9 pm
Convenience Store	9 am – 8 pm	9 am – 9 pm	9 am – 9 pm	9 am – 9 pm

Department Store	10.30 am -9.30 pm	10 am -10 pm	10 am -9 pm	10 am – 9 pm
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Source: Euro monitor International

Retailers in Thailand normally operate every day including weekends and national holidays. There are no restrictions on the number of opening days per year. Retailers are more flexible and aim to cater to consumer lifestyles and demands. Opening hours of retailing in Thailand vary depending on location and nature of business. Opening hours in urban areas are slightly longer than in rural areas due to differences in lifestyle. Urban people tend to finish work later so retail outlets stay open up to 10:00 pm, whereas outlets in non-urban areas usually close at 9:30 pm. Festive season or mid-year sales may see outlets open until midnight.

### Key Food Retailers in Thailand

Company Name	Store Format	Ownership	2015 Sales (\$million)	No. of Outlets (2015)
Ek-Chai Distribution System Co., Ltd.		UK		1,843
<ul style="list-style-type: none"> <li>Tesco Lotus Hypermarket</li> </ul>	Hypermarket & Compact Hypermarket			190
<ul style="list-style-type: none"> <li>Tesco Lotus Extra</li> </ul>	Compact Hypermarket			166
<ul style="list-style-type: none"> <li>Lotus Express</li> </ul>	Convenience Store			1,487
7-Eleven – CP All Pcl.	Convenience Store	Thai	\$7,292	8,127
Siam Makro Pcl.	Cash and Carry	In 2013, CP All acquired Siam Makro from SHV Nederland B.V. - Opened Makro (Cambodia) in September 2016	\$4,455	104
Big C Supercenter Pcl.		France (Berli Jucker Plc (BJC), a TCC subsidiary acquired Big C in March 2016).  - BJC/TCC took over Family Mart in Vietnam and changed name to B's Mart in February 2016.	3,493	571

		- BJC/TCC took over Metro Group (Cash & Carry) in Vietnam in February 2016  - Franchisee of M-Point Mart (MPM), the largest CVS chain in Laos in 2016. Currently, MPM has 22 stores outlets.		
<ul style="list-style-type: none"> <li>• Big C Supercenter (Hypermarket, Big C Extra, and Big C Jumbo)</li> </ul>	Hypermarket			125
<ul style="list-style-type: none"> <li>• Big C Market</li> </ul>	Supermarket			55
<ul style="list-style-type: none"> <li>• Mini Big C</li> </ul>	Convenience Store			391
Central Food Group		Thai  - Central Food Group took over Casino's Big C Chain in Vietnam in 2016	1,577	1,330
<ul style="list-style-type: none"> <li>• Central Food Hall</li> </ul>	Supermarket			8
<ul style="list-style-type: none"> <li>• Tops Marketplace</li> </ul>	Supermarket			86
<ul style="list-style-type: none"> <li>• Tops Supermarket</li> </ul>	Supermarket			5
<ul style="list-style-type: none"> <li>• Tops Daily/Tops Super Koom</li> </ul>	Supermarket			93
<ul style="list-style-type: none"> <li>• Tops Superstore</li> </ul>	Supermarket			2
<ul style="list-style-type: none"> <li>• Tops Segafredo</li> </ul>	Coffee (Italian Brand)			19
<ul style="list-style-type: none"> <li>• Central Wine Cellar</li> </ul>	Wine Shops			3
<ul style="list-style-type: none"> <li>• Central Family Mart</li> </ul>	Convenient Store	Central Retail Joint Venture with Japan in 2012		1,114
The Mall Group		Thai	1,693	13
<ul style="list-style-type: none"> <li>• Home Fresh Mart</li> </ul>	Supermarket			4
<ul style="list-style-type: none"> <li>• Gourmet Market</li> </ul>	Supermarket			9
Foodland Supermarket	Supermarket	Thai	148	19
MaxValue - Aeon (Thailand) Co., Ltd		Japan	204	
<ul style="list-style-type: none"> <li>• MaxValu</li> </ul>	Supermarket			27

• MaxValu Tanjai	Mini-Supermarket			50
Villa Market	Supermarket	Thai	99	34
Lawson 108 (Sahapathanapibul Joint Venture with Japan)	Convenience Store	Japan		60

Source: Euro monitor, RHB, USDA Foreign Agricultural Service - Bangkok, Thailand

#### Profile of Retail Store Customers

	Spending per capita Thai baht	# of visits per year	Spending per visit Thai baht
Tesco Lotus (Hypermarket)	3,398	12.7	269
Big C	2,374	8.3	286
Makro	1,525	4.9	312
Tops	1,768	6.7	266
Tesco Lotus (Supermarket)	1,914	11.5	166
Supermarket (Local)	3,823	16.1	237
7-11	1,428	23.7	60
Tesco Lotus Express	1,699	13.6	125

Source: The Kanta World Panel (Thailand)

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Source: The Kanta World Panal (Thailand)

## **Hypermarkets**

The Thai Retailers Association reported that the number of supercenters/hypermarkets in Thailand rose to 376 in 2015, an increase of 10.6 percent from the previous year. The hypermarket segment has been the best performing sector, as 90 percent of urban Thai shoppers use hypermarkets at least once a week. This report includes the only two major hypermarkets in Thailand, which are Tesco Lotus and Big C. Tesco Lotus with 190 outlets in 2015 (150 outlets in 2014) followed by Big C (125 outlets in 2015 (118 outlets in 2014)). In general, hypermarkets offer more than 100,000 stock keeping units (SKUs) of consumer goods and vary in size from 4,000 to 12,000 square meters (sqm). In addition, these hypermarkets offer a wide range of fresh food and packaged food and beverages, which generally account for 60 to 65 percent of their total product assortments. The average Thai consumer spends about \$150 per month on retail products, of which 49 percent is spent on fresh foods. Both Big C and Tesco Lotus have also introduced a new store format called “Extra,” which offers a greater range of premium products including a wide selection of imported products targeting middle and high income customers. Hypermarket operators are also diversifying their store formats and turning to smaller-scale retail stores including mini-supermarkets and convenience stores due to government zoning regulation, limited prime area and higher land prices to develop.. In addition, its expansion in areas along the borders of neighboring countries like Malaysia, Laos, and Vietnam also is helping to increase its customer base.

Big C has three hypermarket formats: Big C Supercenter, Big C Extra, and a wholesale professional-oriented format called Big C Jumbo. Big C Supercenter targets the low to middle income customer segments while Big C Extra targets the middle to high income customer, offering a wider range of premium fresh and dry food items as well as a wide selection of imported products, including private label products. Big C Supercenter and Big C Extra offer over 100,000 SKUs of consumer products and food items. Their sizes vary from 4,000 to 12,000 sqm and the sales mix is approximately 60 percent food and 40 percent non-food items. Big C Jumbo stores use a wholesale membership format that targets hotels, restaurants, caterers, small and medium size retailers, companies and institutions, and households that buy in large volumes. Big C Jumbo’s sales mix is approximately 80 percent food and 20 percent non-food items. Big C Market stores utilize supermarket formats that target low-to-middle income customer segments. These stores have smaller selling areas ranging between 750 to 2,000 sqm and a smaller number of items ranging from 10,000 to 15,000 SKUs. Mini Big C stores use convenience store formats that target low-to-middle income customer segment and carries up to 4,300 SKUs with an average size of 160 sqm and a sales mix of 90 percent food and 10 percent non-food items.

Tesco Lotus Hypermarket and Tesco Lotus Extra offer 80,000-100,000 SKUs and 60-65 percent of total sales result from food and fresh foods. The Tesco Lotus Department Store or compact hypermarket offer 60,000-80,000 SKUs and 3,000-5,000 sqm while Lotus Express and Tesco-Lotus with smaller sizes of 300-1,500 sqm and 3,000-40,000 SKUs. Tesco Lotus offers imported products to every store format while premium products are available in Tesco Lotus hypermarket format locating in middle income consumers areas.

## **Cash and Carry**

Cash and carry businesses are important to the Thai economy. Cash and carry is the perfect place for consumers to shop for grocery and non-grocery products for their stores. These customers purchase in bulk and benefit from significant discounts. These cash and carry establishments also target small and medium-sized entrepreneurs, hotels, restaurants, catering (HRC) establishments, institutions, offices and the food service industry. These stores usually encompass an area of 10,000 sqm and carry 12,000 to 15,000 SKUs. It carries approximately 80 percent food and 20 percent non-food items. Cash and carry stores in Thailand are positioned towards businesses rather than individual consumers. However, cash and carry is now beginning to accept individual consumers. Key business customers of cash and carries are HRC companies and food service institutions. However, cash and carries tend not to appeal to the majority of individual consumers because they are limited by the large volume purchase requirements.

### Cash and Carry: Value Sales 2010-2015

US\$ million, current prices	2010	2011	2012	2013	2014	2015
Cash and carry	2,795	3,141	3,621	4,088	4,388	4,552
% growth	-	12.4%	15.3%	12.9%	7.3%	3.7%

Source: 1) Euro monitor International from trade press, company research, trade interviews.

2) CP All acquired the business of Siam Makro during 2013. Therefore, Makro's performance has been recorded from July – December 2013.

Siam Makro, the first membership-based Cash & Carry retail store in Thailand was established in 1988 and registered under the name “Makro.” The CP Group acquired the business of Siam Makro during 2013. Makro has stated its goal is to be the 1<sup>st</sup> choice supplier of professional food business operators i.e. food retailers, distributors, HRC distributors, and food service providers. At the end of 2015, Makro had a total of 98 stores (in which 11 stores in Bangkok and nearby while 87 stores in provincial. Siam Makro has approximately 3 million members of which 700,000 are traditional retailers, approximately 500,000 are HRC, and the remaining 1.8 million are categorized as “others”. Total income generated from the 3 customers' sectors is traditional retail players 50%, HRC 30%, and the remaining of others 20%.

Makro operates five different store formats in Thailand including:

- Classic Store: Typical cash & carry structure designed to serve professional customers with store sizes ranging between 5,500-12,000 sqm. Their primary customers are small retailers, HRC and other institutional business operators.
- Eco Store: This store is designed to serve HRC customers located in tourist areas like Phuket, Samui, and Krabi. The majority of the selling space is dedicated to food products.
- Eco Plus Store: This store is designed to serve food professionals, both HRC and small food retailers. Most of the selling space is dedicated to food products for HRC and small food retailers. This format is expected to be the main concept for future expansion.
- Siam Frozen Shop: Small stores with approximately 100-150 sqm that are positioned as frozen food specialty stores selling mostly frozen products to the HRC customers. The company now has two outlets in Chiang Mai and Udonthani.
- Makro Foodservice store: Since 2012, the first Makro Foodservice store in Hua Hin, with approximately 5,700 sqm has been introduced and well accepted by the targeted HRC customers - ranging from small street vendors, fine dining restaurants, and 5-star hotels. The company developed more Makro Foodservice Stores on a smaller scale with sales area of 1,000 sqm and

2,000 sqm in the Patong and Rawai areas of Phuket. The company continues to increase the Makro Foodservice Store size from 1,000 to 3,000 sqm nearer to targeted HRC customers, as well as in areas of limited land space near high-potential tourist destinations or community malls. These store formats include walk-in fruit and vegetable cold-rooms, a seafood section with live, fresh, and frozen seafood, and gourmet section for meats, cheeses, bakery, and wines.

## Supermarkets

The supermarket business in Thailand is driven by six major players, which are Central Food Retail (Central Food Hall and Tops Marketplace), The Mall Group (Home Fresh Mart and Gourmet Market), Foodland Supermarket Villa Market, MaxValu Supermarket, and UFM Fuji. This highly competitive segment is concentrated in Bangkok where consumers with greater disposable income and more discerning customers reside. The supermarket sector tends to cater to medium and upper income consumers by offering a wide range of premium products and a broader assortment of local and imported processed food, fruits and vegetables, meat and seafood, and beverage products. Central Food Retail dominates this segment with 216 outlets nationwide.

## Convenience Stores

The convenience store is expected to record one of the strongest performances over the forecast period with the current trend in mergers and acquisitions set to continue. As the fastest growing segment in the retail food sector with over 13,000 stores nationwide, 15 percent of its total sales are targeted to fast moving packaged consumer goods (FMCG). In 2015/2014, the growth of convenience stores was 5.4 percent. The leading player in this sector is 7-Eleven, which accounts for 63 percent of total convenience store and has 8,832 outlets in Thailand making it the world's second largest 7-Eleven network after Japan. CP All, the local operator of 7-Eleven plans to open 600 stores every year to reach 10,000 stores by 2018. As part of their strategy to be the foremost convenience store in Thailand, CP All is emphasizing ready-to-eat food products that are fresh, clean and safe. As part of this strategy CP All is working with business partners to offer a variety of new products and brands that will be available only at 7-Eleven locations. Family Mart as a convenience store format also plans to open 60 new stores in condominiums, hospitals, office buildings, and gas stations throughout the country. Tesco has also aggressively expanded its network of smaller Lotus Express stores at gasoline stations and downtown areas with more than 1,500 locations across the country, designed to be a direct competitor to 7-eleven. The Central Retail Corporation, the operator of Tops Daily convenience stores, established a joint venture with Family Mart in September 2012 and has converted its numbers of Tops Daily stores to Family Mart Stores, which has risen to 1,114 stores recently. The company plans to expand to another 3,000 locations in the next to three years. The company focuses on expanding new outlets through franchises. Aeon (Thailand) also plans to expand their convenience store brand "Max Valu Tanjai" nationwide with approximately 20 new outlets every year. Another convenience store, Lawson 108 with 60 stores now, plans to open 100 more stores in 2017.

### Number of Convenience Stores in Thailand

Convenience Stores	2011	2012	2013	2014	2015
Stand- alone convenience stores	9,773	9,526	10,404	11,153	11,727
• 7-Eleven stores	5,350	5,842	6,373	6,986	7,597

• Others	4,423	3,684	4,031	4,167	4,130
Convenience stores in gas stations	2,135	1,988	2,062	2,159	2,300
• 7-Eleven stores	926	980	1,056	1,141	1,235
• Others	1,209	1,008	1,006	1,018	1,065
• Total convenience stores	11,908	11,514	12,466	13,312	14,027

Source: CP All Plc.

Over 90 percent of urban Thai shoppers use convenience stores and visit them regularly about 13 times a month. It is reported that an average of 10.9 million customers visit convenience stores each day and that spending per visit averages 60 baht (US\$2) totals to 1,428 baht (US\$40) per person per year. Thai society is experiencing multiple demographic transitions resulting in more nuclear families, childless couples, and people living alone. These demographic transitions have been accompanied by changes in the lifestyle and demands of consumers. In the retail food industry, modern Thai consumers nowadays prefer ready-to-eat food and are more likely to purchase fewer items per store visit, and go shopping with increased frequency. Due to their popularity, the Thai convenience retail sector has become enormously competitive as CP All's 7-Eleven chain faces growing competition from Tesco Lotus Express, Mini Big C, Tops Daily, Family Mart and Lawson 108. Consequently, convenience store owners have re-focused their sales strategies on food items and added new food product lines, especially ready-to-eat meals. Foods and beverages account for 72 percent of total product assortment in convenience stores.

Hypermarkets, supermarkets, and cash and carry establishments present excellent opportunities for U.S. exporters of consumer food items. The main factors U.S. exporters should consider before entering the Thai market are pricing, product shelf life, consumer preferences and market promotion funds for new products. Intense competition in the retail food market, particularly from large-scale modern companies that use pricing strategies to low-income consumers, caused the closure of many traditional food stores. Thailand's hypermarket sector is dominated by two large companies, which normally give them bargaining power with suppliers. The convenience sector is not considered to be an attractive channel for U.S. products due to the pricing disadvantages as these stores mostly rely on locally and regional produced goods.

There have been numerous changes in retail food store formats since 2007. The number of stores with large layouts outnumbers older and smaller stores, namely stand-alone stores with no theater, restaurants, or entertainment venues. Today, the flow of local shoppers has been diverted from wet markets and grocery stores to hypermarkets and supermarkets, therefore, making the latter the better option for entering Thailand's retail food market.

The traditional 'mom and pop' stores and wet markets in Thailand are not ideal entry points for U.S. exporters primarily due to price sensitivities and preferences for traditional foods. U.S. exporters should be aware that many U.S. branded food products such as snack foods, candy, chocolate and breakfast cereals are already present in the market, but produced domestically or in neighboring Asian countries.

Most retailers have recently modified their marketing strategies by expanding their private label product offerings, instituted money promotions and discounts or cash back, and created loyalty programs through membership cards in order to attract new customers and maintain market share. The

Kasikornthai Research concludes that total value of private label or house brand in 2015 is about \$831 million. Some supermarkets and hypermarkets have their own private label brands for ready-to-eat foods, ready-to-cook prepared foods, home-made bakery items, sausages, water, cooking oil, rice, sauces, dairy products and fruit juice. Private label products provide good sourcing opportunities for U.S. food ingredients, although some of U.S. ingredients such as frozen fries and dried fruits, are not competitive as a result of free trade agreements (FTAs) Thailand has signed with neighboring Asian countries like China, Vietnam, Malaysia, etc. Nonetheless, margins on private label products for retailers are double that of branded products and have grown in popularity due to the ability of retailers to price them accordingly. For example, Central Food Retail provides a variety of private label choices targeting three different consumer groups: the premium private label “MyChoice” for ready-to-eat products and specialty products sourced from around the globe (i.e. breakfast food items, cheese, deli meats, dried fruits and nuts); mid-priced products characterized by “Tops”; and budget-end products represented by “My Choice Thai”, “Smarter” and “Love for Value”. In addition, Central Food Retail also operates a special category of outlets such as Segafredo (coffee franchise from Italy), wine shops, and a cheese room. Big C also has its own private label “Big C” for mid-priced dry food, non-food and fresh food products; while imported food items from France are sold under the brand “Casino” in select Big C Extra stores for high end consumers. Big C carries in total over 120,000 SKUs, with prices ranging from opening price point to premium high-end items in every product category ranging from food to non-food products. Despite these existing private label products, there are still significant opportunities for growth in this market.

**Online Shopping**

Retail food operators in Thailand have also expanded into online shopping and social networks as customers gain greater access to the internet through mobile devices and reliable online-payment service providers. Big C’s online shopping (<http://www.biggc.co.th/>); current service package includes online orders, same-day pick up or within 24-hours delivery service with purchases over \$50. Central Food Retail (<https://topsshopponline.tops.co.th>) offers free delivery with purchases over \$35. Tesco Lotus (<http://shoponline.tescolotus.com/>) charges a \$2 delivery fee and a 1 day advance order. Tesco Lotus uses the E-Commerce channel to service customers’ shopping online: 1) ShopBox 24 for a delivery of goods to the ShopBox 24 lockers through 48 selected condominiums in Bangkok; 2) Click & Collect for customers to order online and pick-up the goods from three select Tesco Lotus outlets (Rama 4, Tesco-Lotus Plus Mall Srinakarin, and Hang Dong, Chiangmai); 3) online orders through the Happy Fresh application for immediate delivery by motorcycle; and 4) iBeacon promotions on customer smartphones when they walk thru five select stores. Tesco Lotus plans to expand this last marketing initiative to 1,800 stores soon. Despite the growth of online shopping, there are still a large percentage of lower income Thai consumers who do not have access to internet and lack computer skills. These consumers still prefer to physically purchase their products rather than making online buying decisions.

The Kasikorn Research and Thai Retailers Association forecasts online shopping in modern trade retail sales represents approximately 3 percent of all sales or 35,000 million baht (just over \$1 billion). Department store and hypermarket continue to promote online shopping because of less number of outlets as per below table..

Modern Trade’s Online Shopping

	Department Store	Hypermarket
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Highlight	Reputation of the store, variety of products and brands, guarantee product quality	To serve customers who want to avoid traffic and parking
Tools	Application, website	Application, website
Good selling items	Apparel and cosmetics	Consumer products such as drinking water, rice
Order per time	1-2 pieces	Minimum quantity and value per order
Marketing strategies	<ul style="list-style-type: none"> <li>- Free deliver in 24 hours</li> <li>- Money collected at the destination or pay online</li> <li>- Goods returned as per mentioned condition</li> <li>- Special discount only online shopping</li> </ul>	<ul style="list-style-type: none"> <li>- Delivery fee may be waved based on certain conditions</li> <li>- Money collected at the destination or pay online</li> <li>- Goods returned as per mentioned condition</li> </ul>
Competitors	<ul style="list-style-type: none"> <li>- Grey market</li> <li>- E-market place</li> </ul>	Traditional wholesalers and retailers

### Advantages and challenges facing US products in Thailand

Advantages	Challenges
U.S. exporters are able to provide many varieties of high quality agricultural products from fresh to processed foods.	Stiff competition from countries that signed Free Trade Agreements (FTA) with Thailand such as Australia, New Zealand, China, Peru, Chile, India, Korea, Japan and others like South Africa and Europe.
Increase in Thai consumers' preference for higher quality products.	U.S. products are not always price-competitive as compared to imports from China, Australia, New Zealand, Korea, and Malaysia.
Local Thai consumers view US-origin products as being of high quality and safe.	Local manufacturers can quickly improve or change the quality of their products, taste or packaging sizes according to consumer behavior while keeping production cost low.
More than 10 percent of Thailand's population live in Bangkok, which accounts for 90 percent of fast moving consumer goods sales	Lack of knowledge about new U.S. products makes Thais reluctant to purchase unknown foreign products or not popular brands.
Growing middle class increasingly spends more on imported food.	Price is still the most important factor when making a purchasing decision.
New retail outlets are expanding, which allows all Thai consumers access to new imported products.	Lack of importer and retailer knowledge and training in purchasing and handling of U.S. food products.
	Preference for local brands (e.g. Nestle, Singha Beer, Chang Beer, etc.)
Thai palettes are increasingly including consumption of imported food items.	Lack of continuous promotion of U.S. products in the Thai market. Exporters need to support market promotion campaigns to open new markets or

	promote new brands.
More disposable income to spend on high premium products.	Market penetration for imported products is concentrated in Bangkok and major tourism areas.
The growing tourism industry is fueling demand for U.S. seafood, wines, whiskies, etc.	Foods similar to American products cost less to produce locally.
Reliable supply of U.S. agricultural products and advanced U.S. food processing technology.	Thai government policy and actions try to increase demand for Thai local products.
Good relationships with foreign suppliers.	High import tariffs on high value consumer foods and beverage products which hamper the imports of U.S. meat products, wine, whiskies, beer, cherries, peaches, grapes, apples, pears.
Gift giving is essential and luxury foods are preferred. Shoppers like to seek and purchase new products for gifts.	Marketing costs to increase consumer awareness are high.
Attractive packaging gives the impression of better quality.	Quality of domestic production and marketing is improving.
Thailand's beneficial geographic location is viewed as a gateway to larger Indochina and other Asian markets.	Thai importers have shifted to products produced in ASEAN countries due to higher import tariffs for U.S. imported products.
Demand shift from unprocessed foods in fresh markets to a wider array of processed products or ready to eat meal available in large supermarkets.	SPS and TBT issues hamper U.S. imports.
The fast pace of modern life and the increase in the number of singles, one-parent families, and working women have led to the change the way food is prepared and consumed.	<ul style="list-style-type: none"> <li>- Most of ready-to-eat meals can be produced locally.</li> <li>- Deli department in supermarkets can use high quality U.S. ingredients such as beef, seafood, peas, lentils in ready-to-eat meals</li> <li>- House brand products can use U.S. fruits in yogurt, and U.S. raisins in bread</li> </ul>
The ASEAN Economic Community went into effect at the end of December 2015.	- Thai food processors are looking for ingredients for further process food products to serve 625 million people from the ASEAN 10 countries. U.S. ingredients price cannot compete from other origins.
Approximately 14 percent of the Thai population will be aged 60 and over by 2014 and this number will rise to 27 percent by 2050.	Limited number of domestic suppliers of healthy and dietary food for an aging population
Health conscious consumers.	Limited suppliers of gluten free and organic food products from the U.S.
A select group of consumers seek foods derived from all natural ingredients and that can demonstrate they were sustainably	U.S. seafood products have great potential when they are price competitive because they are marketed as sustainably managed

produced	
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## **Section II. Road Map for Market Entry**

### Entry Strategy – Supermarkets, Hypermarkets and Cash and Carry

The best method for U.S. exporters to enter the Thai market is to contact the supermarkets, hypermarkets or cash and carry companies directly. Any retailer that does not have their own import division will have to contract with local importers or agents to meet the needs of the exporter. Choosing the right importer is one of the most important decisions for exporters wishing to do business in Thailand. The local importer will be a key partner helping expand business opportunities and minimize the need for exporters to establish direct contact with multiple retail chains. In addition, a local importer familiar with market conditions and the regulatory environment can help exporters successfully market their products. U.S. exporters should be aware that many multinational retailers in Thailand charge listing fees or a listing allowance for new products. The fee will be charged in accordance with a formula based on the number of retail outlets and SKUs. U.S. exporters want to promote brands and big volume products should contact importers and retailers for marketing campaign.

### Distribution Channels - Supermarkets, Hypermarkets and Cash and Carry

The distribution channel for supermarkets, cash and carry, and hypermarkets in Thailand normally start with importers, then distributors, and end with the central distribution warehouse or direct to retail outlets. The foodstuffs will be kept either in importers' warehouse, distributors' warehouse or a central distribution warehouse before delivery. Some supermarkets, superstores and hypermarkets operated by multinational operators import food products directly and store them at their own distribution centers before delivery to each outlet.

### Entry Strategy - Convenience Stores, Gas Marts and Kiosks

The best method for U.S. exporters to enter this market segment is to contact the head office of convenience stores, gas marts, and kiosks. U.S. exporters should be aware of the listing fee or listing allowance that may be charged by large convenience store chains. The fee will be charged in accordance with a formula based on the number of outlets and SKUs.

U.S. branded foods sold in these stores is generally produced in Thailand or neighboring Southeast Asian countries. These products include snack foods, chocolates, cookies, candies, gums, and breakfast cereal. Distributors often import U.S. branded foods from neighboring countries rather than from the United States because of the lower transportation cost and AFTA preferential tariffs. Sales trends of imported food from neighboring and other FTA countries in convenience stores will increase in line with the purchasing power of the target group. U.S. products will be well received by Thai consumers in convenience stores if price and quality are similar to what local suppliers and other low cost exporting countries offer.

### Distribution Channels - Convenience Stores, Gas Marts and Kiosks

A common distribution channel for convenience stores, gas marts and kiosks starts with U.S. exporters,

then to U.S. consolidators and traders, and end with Thai distributors to convenience stores, gas marts and kiosk distribution centers. Some Thai distributors distribute foodstuffs directly to convenience stores, gas marts and kiosk outlets. Most of the foodstuffs that are distributed directly to the outlets are fresh, including baked goods and dairy products. The flow pattern of different retailers varies depending on the sales volume and number of outlets.

Entry Strategy - Traditional Markets

For U.S. exporters, Thai traditional wet markets are more difficult to enter because of lower-priced products, lower consumer purchasing power, limited traditional distribution outlets, and consumer preference for traditional Thai and Chinese food products.

Distribution Channels - Traditional Markets

Local manufacturers usually have their own distributors to deliver their products. Some local producers are under the supervision of a Royal Project in which product distribution is managed by a designated employee.

**Section III. Competition in 2015**

(US\$)

<b>Product</b>	<b>Total Imports</b>	<b>Direct Imports from the U.S.</b>	<b>Share of U.S. Imports in Total Imports</b>	<b>Major Competitors</b>
Beef & beef products (0201, 0202, 021020, 160250)	99,532,770	3,141,306	3 %	Australia (41%), India (35%), New Zealand (12%)
Breakfast cereals/pancake mix (190410, 190420, 190430, 190490)	42,665,796	1,446,645	3%	China (49%), Malaysia (14%), Philippines (11%)
Cheese (040610, 040620, 040630, 040640, 040690)	56,564,426	5,361,169	10%	New Zealand (35%), Australia (23%), USA (10%)
Coffee, roasted (090121, 090122)	10,652,222	1,690,697	16%	Malaysia (30%), Laos (22%), USA (16%)
Instant coffee/coffee soluble (210111, 210112)	92,317,546	462,645	1%	Malaysia (56%), Vietnam

				(20%), Indonesia & Laos (7%)
Dairy products (excl. cheese) (0401, 0402, 0403, 0404, 0405, 210500, 350110, 350190, 350220, 350710)	574,694,528	38,359,090	7%	New Zealand (48%), Australia (11%), France (9%)
Dried fruits (0804, 080620, 0813)	35,027,154	8,963,335	26%	Indonesia (41%), USA (26%), China (12%)
Fish and seafood products (0302 - 0308, 1604 - 1605)	2,406,071,678	155,638,982	7%	China (15), Vietnam (9%), Taiwan (8%)
Fresh fruits (0803 – 0810)	623,462,093	37,689,910	6%	China (64%), New Zealand (10%), USA (6%)
Fresh vegetables (0701 – 0709)	203,475,376	3,409,569	2%	China (78%), Laos (7%), Myanmar (3%)
Fruit and vegetable juices (2009)	63,742,183	8,701,551	14%	Israel (28%), China (16), USA (14%)
Frozen potatoes (071010, 200410)	49,615,321	16,517,087	33%	USA (33%) Netherlands (26%), Belgium (18%)
Sausage and prepared meat (1601, 1602)	18,846,966	1,735,601	9%	China (28%), Australia (28%), USA (9%)
Snack food (excl nuts) (170410, 170490, 180620, 180631, 180632, 180690, 190510, 190520, 190530, 190531, 190532, 190540)	281,085,630	13,919,680	5%	Indonesia (22%), Malaysia (17%), China (16%)
Tea incl herb tea (090210 – 090240, 090300)	13,606,581	303,470	2%	Indonesia (25%), China (18%), Japan (15%)
Tree Nuts	172,310,348	27,513,503	16%	Vietnam

0801 – 0802				(40%), Indonesia (22%), USA (16%)
Turkey meat 020724 – 020727, 160231	214,746	167,968	78%	USA (78%), U.K. (8%), Malaysia (6%)
Wines 2204	49,903,094	4,493,307	9%	France (40%), Australia (23%), USA (9%)
Beer made from malt 2203	15,625,667	329,471	2%	Belgium (19%), Netherlands (18%), Malaysia (13%)
Spirits 2206	254,820,683	6,558,259	3%	UK (60%), France (25%), USA (3%)

Locally and regionally produced snacks and beverages dominate the Thai market. Imported foods, however, do relatively well in Bangkok (especially near upper income residential areas and expatriate neighborhoods) and major tourist areas such as Phuket, Hua-Hin, Krabi, Samui, and Chiang Mai. Thailand's Kanta World Panel research has identified the fastest moving consumer goods (FMCG) as beer, facial tissue paper, drinking water, sun protection products, yogurt, rice, coffee (ready to drink), chicken stock, and canned tuna.

Free Trade Agreements (FTAs) have created additional challenges for U.S. exporters. Many U.S. food companies have shifted manufacturing bases from the United States to Thailand or neighboring countries such as Malaysia, Australia, China, and Indonesia to take advantage of the lower production cost. In addition, FTAs have lowered tariffs and provided favorable treatments to competitors and consequently have made U.S. products less competitive in the Thai market.

#### **Section IV. Best Market Prospects**

The best market prospects for U.S. suppliers include fresh fruits (cherries, grapes, strawberries, oranges, apples, berries), nuts (almond, walnuts, hazel nuts, and pistachios), breakfast cereal, frozen seafood (scallop, lobster, crab, oysters, wild-caught salmon, fish, mussel), dried fruits (raisin), fruit juices, jam, vegetable oils, candy, chocolate, chocolate milk mix, dairy products (cheese, cheese spread, cream cheese, whipped cream, cheese sticks, cheese dip and ice-cream), pie fillings, processed meat, spices, seasonings and sauces, snack foods, crisp bread, syrup, vinegar, wine, spirits, beer and pet food.

The best-selling U.S. food products are fresh fruits (cherries, grapes, strawberries, and WA apples), frozen fries, snack foods, breakfast cereal, wine, dried fruits, popcorn, seafood including Alaska King crab legs, scallop, and fish, stone fruits (peaches, plums, nectarines) and pet foods. Products that are not

currently present in the market in significant quantities, but have good sales potential are American bourbon and whisky, sugar confectionary, soup and broth, biscuits and wafers, candy, processed meat, chocolate milk mix, cheese, dip sauce, cooking products and organic products.

## **Section V. Post Contacts and Further Information**

Office of Agricultural Affairs  
U.S. Embassy  
120-122 Wireless Road  
Bangkok 10330 Thailand  
Tel: 662-205-5106  
Fax: 662-255-2907  
E-mail: [agbangkok@fas.usda.gov](mailto:agbangkok@fas.usda.gov)  
Website: [www.fas.usda.gov](http://www.fas.usda.gov)

Thai Retailer Association  
Room 100/9, 12<sup>th</sup> Floor, Vongvanich Tower B  
Rama 9 Road, Huaykwang  
Bangkok 10320  
Tel: 662-645-0422  
Fax: 662-645-0421  
E-mail: [thairetailer123@gmail.com](mailto:thairetailer123@gmail.com)

Thai Government  
These are the major regulatory government agencies that deal with food and agricultural products.

Food & Drug Administration, Ministry of Public Health

Import License, Product Registration & Label Approval  
Food Bureau  
Tivanont Road, Muang  
Nonthaburi 11000  
Tel: 662-590-7178  
Fax: 662-591-8460  
E-mail : [food@fda.moph.go.th](mailto:food@fda.moph.go.th)

Food Products from Animals  
Tivanont Road, Muang  
Nonthaburi 11000  
Tel: 662-590-7207/8  
E-mail: [food@fda.moph.go.th](mailto:food@fda.moph.go.th)

Food Products from Plants  
Tivanont Road, Muang  
Nonthaburi 11000  
Tel: 662-590-7023

E-mail: [food@fda.moph.go.th](mailto:food@fda.moph.go.th)

Chemicals and Food Additives  
Tivanont Road, Muang  
Nonthaburi 11000  
Tel: 662-590-7209, 590-7219  
E-mail: [food@fda.moph.go.th](mailto:food@fda.moph.go.th)

Food for Special Purposes and Food Supplement  
Tivanont Road, Muang  
Nonthaburi 11000  
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Other Food Products  
Tivanont Road, Muang  
Nonthaburi 11000  
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Department of Foreign Trade, Ministry of Commerce  
Import Control  
Commodity Trade Division  
Sanam Bin Nam-Nonthaburi Road  
Nonthaburi 11000  
Tel: 662-547-4737  
E-mail: [cddtft@moc.go.th](mailto:cddtft@moc.go.th)

Commodity Division  
Sanam Bin Nam-Nonthaburi Road  
Nonthaburi 11000

Tel: 662-547-4801

Grain Division  
Sanam Bin Nam-Nonthaburi Road  
Nonthaburi 11000  
Tel. 662-547-4820

Department of Livestock, Ministry of Agriculture and Cooperatives  
Animal Quarantine Inspection Services  
Phyathai Road  
Bangkok 10400  
Tel. 662-653-4444 Ext. 4110  
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Bangkok Seaport Animal Quarantine Station  
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Bangkok 10110  
Tel. 662-249-2112  
Fax 662-249-4358

Bangkok Airport Animal Quarantine Station  
Suvarnabhumi Airport  
Bangkok  
Tel: 662-134-0731-2  
Fax: 662-134-0733

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