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Report Highlights:

Thailand's retail market is projected to grow by approximately 3 percent to \$133 billion in 2026, with growth concentrated in modern retail and e-commerce. High household debt and uneven purchasing power continue to favor value-oriented products and promotions, while convenience, health, and affordable premium options offer opportunities for suppliers. Thailand imported \$9.3 billion in consumer-oriented agricultural products in 2025, including \$407.2 million from the United States.

Market Fact Sheet: Thailand

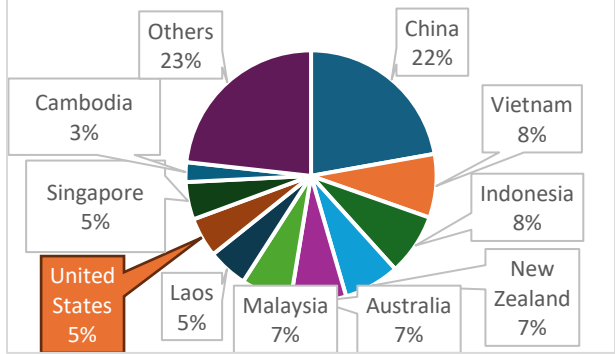
Executive Summary

Thailand, ASEAN’s third-largest economy, presents significant trade opportunities supported by a growing middle class and expanding consumer market. In 2025, Thailand imported approximately \$23.5 billion in food and agricultural products, including \$1.7 billion from the United States, up 17 percent from 2024. The United States is Thailand’s third-largest agricultural supplier, while Thailand ranks as the 26th largest export market for U.S. agricultural products. Continued urbanization, projected to reach 58.4 percent by 2030, is expected to further drive demand across food services and retail sectors.

Consumer-Oriented Agricultural Imports

The United States was the 8th largest supplier of consumer-oriented agricultural products to Thailand in 2025 with exports valued at \$404 million. Thailand’s total 2025 import value of consumer-oriented products was \$9.3 billion, an 11 percent increase from 2024.

Consumer-Oriented Agricultural Imports in 2025



Top 10 Exporting Countries to Thailand

Food Retail Industry

In 2025, Thailand’s food retail sales reached approximately \$60.8 billion, accounting for 41 percent of the country’s total retail market valued at \$148 billion, up 3–4 percent from 2024. Amid rising living costs and household debt, consumers increasingly prioritized essential and value-driven purchases while adopting multi-channel shopping to maximize savings.

Food Processing Industry:

Thailand is a leading global exporter of agricultural products with a well-developed food processing sector. Strong international demand for processed foods continues to drive imports of raw materials not readily available domestically. In 2025, Thailand exported approximately \$29 billion in processed food products and

Quick Facts: CY 2025

Imports of Consumer-Oriented Products:

\$9.3 billion

List of Top 10 Growth Products in Thailand

- 1) Dairy products , 2) Processed vegetables, 3) Soup & Food preparation, 4) Fresh fruits, 5) Fresh vegetables, 6) Roasted and extract coffee, 7) Bakery goods, cereal, pasta, 8) Tree nuts, 9) Chocolate & cocoa products 10) Beef & beef products

Food Industry by Channels (U.S. billion)

Retail Food Industry	\$60.8
Food Service-HRI	\$30.2
Food Processing	\$36.0
Food and Agriculture Exports	\$51.0

Top 10 Retailers in Thailand

Supermarkets

- 1) Central Food Retail
2) Gourmet Market
3) Villa Market
4) Foodland
5) MaxValu
6) CJ Supermarket

Hypermarkets

- 1) Lotus
2) Big C

Convenience Stores

- 1) 7-Eleven
2) Lawson 108
3) CJ Express

Cash and Carry

- 1) Makro

- 2) Go Wholesale

GDP/Population

Population: 65.8 million

GDP: \$551 billion

GDP per capita: \$7,830

Sources: Trade Data Monitor, IMF, Euromonitor, Office of the National Economic and Social Development Board, International, Mordor Intelligence

imported \$9.6 billion in food processing inputs, including \$360 million from the United States.

Food Service Industry:

Thailand’s consumer foodservice market reached approximately \$30.2 billion in 2025, driven by tourism recovery, urbanization, and demand for convenience. Expanding quick-service restaurants, cafés, and delivery platforms supported the growth as consumers increasingly sought value-oriented, premium, and healthier dining options.

Strengths/Weaknesses/Opportunities/Challenges

Strengths	Weakness
Well-established market with modern distribution channels	Trade barriers on imported food & beverages to protect domestic producers.
Opportunity	Challenge
Growing urban population and many international tourists	Higher tariffs on U.S. products compared with countries with free trade agreements with Thailand.

SECTION I: MARKET SUMMARY

On August 17, 2026, the National Economic and Social Development Council reported that real GDP grew 1.9 percent year over year in the second quarter of 2026 and projected full-year growth at 2.0–2.5 percent. Strong exports and private investment supported activity, while weak household consumption, high household debt, slower tourism growth, global trade uncertainty, and elevated energy prices remain downside risks.

Thailand's economy remained resilient in 2025, expanding by 2.4 percent for the year. Growth was supported by recovering exports and tourism and continued public and private investment. Non-agricultural sectors remained the principal drivers of overall economic activity.

In 2025, Thailand ranked as the world's ninth-largest exporter of agricultural and food products, with exports valued at approximately \$51 billion, a marginal increase of 0.2 percent from 2024. Total merchandise exports rose 12.9 percent to \$340 billion, led by electronics and electrical appliances. Agricultural and food products accounted for approximately 15 percent of Thailand's total merchandise exports. Although exports of several traditional bulk commodities weakened, processed and value-added products, particularly seafood and shrimp, continued to expand.

Retail Sector

In its 2026 outlook, the Thai Retailers Association (TRA) projected that retail sales would grow by approximately 3 percent during calendar year 2026 reaching about \$133 billion (4.4 trillion baht). The TRA expects this growth to concentrate in modern and digital channels. E-commerce sales should approach \$30.4 billion (1 trillion baht), accounting for nearly one-quarter of total retail sales. Convenience stores, supermarkets, and omnichannel platforms will likely continue expanding, driven by tourism, urban lifestyles, and demand for convenience.

According to Krungsri Research, high household debt, uneven purchasing power, and intense price competition characterized the 2025 market encouraging purchases of essential goods, smaller packages, private-label products, and promotional offers. Looking ahead through 2026, retailers plan to keep investing in omnichannel services, rapid delivery, loyalty programs, data-driven promotions, and compact formats. Convenience, health and wellness, protein enrichment, ready-to-eat foods, and affordable premium products should remain relevant demand themes, although value will continue to influence purchasing decisions.

Thailand imported approximately \$23.5 billion in agricultural products in 2025, including \$1.7 billion from the United States, an increase of 17 percent from 2024. Consumer-oriented agricultural imports from all suppliers increased 11 percent to \$9.3 billion, with the United States ranking as the eighth-largest supplier. Leading U.S. consumer-oriented products included dairy products, food preparations, tree nuts, fresh fruit, processed vegetables, chocolate and cocoa products, beef, distilled spirits, and wine.

U.S. consumer-oriented agricultural exports to Thailand totaled \$407.2 million in 2025, while corresponding U.S. imports from Thailand reached \$2.9 billion. Consequently, the U.S. trade deficit in this category widened from \$1.7 billion in 2021 to approximately \$2.5 billion in 2025. Differences

between Thai and U.S. trade figures may reflect variations in product classification, valuation, and reporting methodology.

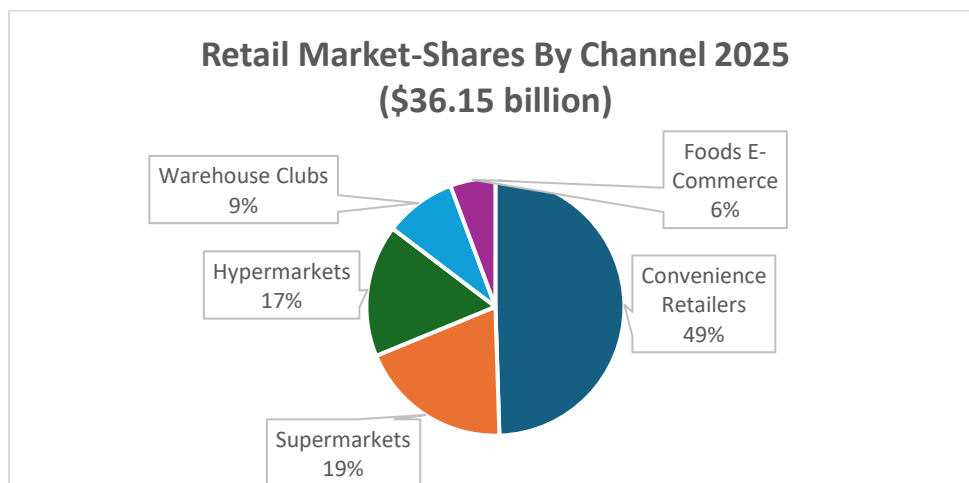
Advantages and Challenges

Advantages	Challenges
U.S. agricultural products have a strong reputation among Thai importers and consumers for quality, food safety, consistency, traceability, and product variety.	U.S. products are often less price competitive than products from Thailand's free trade agreement partners, which benefit from preferential tariff treatment.
Thailand's \$9.3 billion consumer-oriented import market and the United States' position as the eighth-largest supplier demonstrate established demand and opportunities for further growth.	Competition continues to intensify as domestic producers improve product quality and suppliers from China, Australia, New Zealand, Japan, South Korea, ASEAN, and other markets expand their presence.
Expanding modern retail, food service, e-commerce, and omnichannel distribution networks are improving market access for imported products.	Importers face complex registration, labeling, licensing, and sanitary and phytosanitary requirements. Limited interagency coordination and regulatory changes introduced without sufficient advance notice may also disrupt trade.
Urbanization, tourism, and growing consumer interest in convenient, premium, health-oriented, natural, and sustainably produced foods create opportunities for U.S. exporters.	High household debt, uneven purchasing power, and price-sensitive consumption constrain demand for premium imports.
People aged 60 or older account for more than 20 percent of Thailand's population, creating greater demand for healthy-aging products, including nutritious and functional foods, dietary supplements, convenient meal solutions, and products tailored to older consumers.	Population aging may constrain workforce growth, increase household healthcare expenses, and shift consumer spending toward essential goods and services, potentially limiting discretionary spending.

The structure and development of Thailand's food retail sector reflect these market conditions. While price sensitivity and strong competition favor large, value-oriented retail formats, expanding modern retail and digital distribution channels provide U.S. exporters with multiple routes to reach consumers. Figure 1 illustrates the relative importance of Thailand's principal food retail channels and the emergence of e-commerce as a rapidly growing sales platform.

Retail Sales by Channel

Figure 1. Thailand: Retail Market-Shares by Channel 2025



Source: Euromonitor International 2026

According to Euromonitor International, sales through Thailand's five major food retail channels totaled approximately \$36.2 billion in 2025. Although food e-commerce remained the smallest channel (Figure 1), it recorded the strongest growth, with a compound annual growth rate of 15.7 percent during 2020–2025, highlighting consumers' continued shift toward digital purchasing.

Section 2: Road Map for Market Entry

Entry Strategy

Thailand is a diverse market with consumer preferences, purchasing power, and dietary habits varying across regions and market segments. New-to-market U.S. exporters should conduct market research and visit Thailand to evaluate demand, identify target customers, and determine the most appropriate distribution channels. Establishing relationships with qualified local importers, distributors, retailers, foodservice operators, or agents is essential. Local partners should have established customer networks and a thorough understanding of Thai food regulations, product registration, labeling, customs clearance, and import procedures.

U.S. exporters may also participate in trade missions and market-development activities organized by State and Regional Trade Groups and U.S. cooperators. These organizations collaborate with FAS Bangkok and can provide market intelligence, importer contacts, and business-matching opportunities.

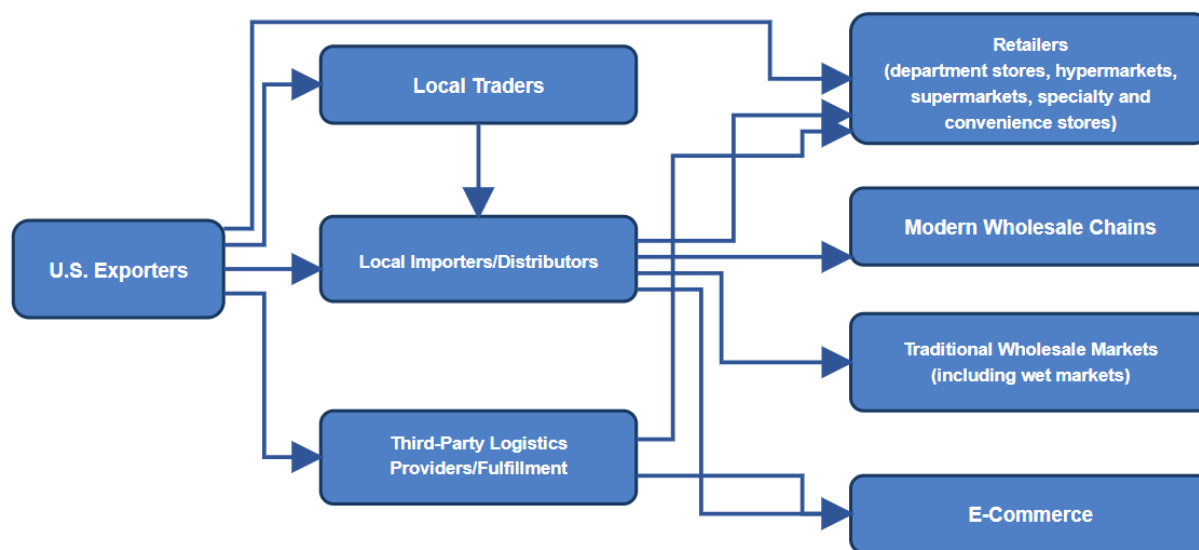
Participation in USDA-endorsed trade shows can also help exporters increase product awareness and connect with prospective importers, retailers, distributors, foodservice operators, and processors. Key exhibitions scheduled for 2027 include [THAIFEX–Anuga Asia](#), May 25–29, which covers food and beverage products for the retail and foodservice sectors; [VIV Asia](#), March 10–12, which focuses on animal production, feed, and related technologies; and [Fi Asia Thailand](#), September 1–3, which targets food ingredients, nutraceuticals, functional foods, and food-processing applications.

For general information about import procedures, please review the [Exporter Guide Annual 2026](#). For those seeking specific import regulations, requirements, and certificates to export products to Thailand, please check the [FAIRS Country Annual Report 2026](#) and [FAIRS Export Certificate Annual 2026](#)

Market Structure

Food and agricultural products are distributed through four primary retail channels: retailers, wholesale chains, traditional markets, and e-commerce (see Figure 2). Offline retail primarily includes hypermarkets, supermarkets, specialty stores, convenience stores, and mini-marts, as well as large chains of wholesalers and traditional markets.

Figure 2. Thailand: Retail Distribution Channels



Note: Retailers may import directly or purchase through local traders, importers/distributors and logistics/fulfillment providers.

Company Profiles and Leading Host-Country Retailers

Krungsri Research estimates that Thailand’s modern trade retail sector grew at around 2.5–3.5 percent in 2025. In its April 2026 outlook, Krungsri Research forecast that growth would slow to 1.5–2.5 percent in 2026 before recovering to an average annual rate of 3.0–3.5 percent during 2027–2028 (see Table 1). Krungsri Research forecasts convenience stores will record the strongest growth among physical retail formats, expanding by 4.5–5.2 percent annually during 2026–2028. This is followed by supermarkets at 3.0–4.0 percent, department stores at 2.0–3.0 percent, and hypermarkets at 1.2–2.2 percent. E-commerce should grow by 7–9 percent annually, driven by continued investment in omnichannel platforms, the expansion of social commerce and rapid-delivery services, and changing consumer purchasing preferences.

Table 1. Thailand: Modern Trade Retail Sales Growth

Period	Status	Growth (Percent)
2021	Actual	-9.0
2022	Actual	4.5
2023	Actual	4.8
2024	Actual	5.0
2025	Estimate	2.5–3.5
2026	Forecast	1.5–2.5
2027–2028	Forecast	3.0–3.5 annually

Source: Krungsri Research- Thailand Industry Outlook 2026–2028 Modern Trade

Thailand’s retail food sector is highly concentrated and led by several large domestic conglomerates, particularly Central Group, TCC Group, and Charoen Pokphand (CP) Group. Central Group operates several major food-retail formats, including Tops Food Hall, Tops Market, and GO Wholesale. TCC Group controls Big C through Berli Jucker Public Company Limited. CP Group maintains an extensive retail and wholesale network through CP ALL and CP Axtra, including 7-Eleven convenience stores, Makro wholesale stores, and Lotus’s hypermarkets and supermarkets.

Department Stores

Department stores primarily serve middle- and upper-income consumers and offer domestic and international brands at mid-range to premium prices. Central and Robinson have a nationwide network, including major provincial and tourism markets such as Chiang Mai, Pattaya, and Phuket. The Mall Group operates Bangkok-area properties and The Mall Korat; its portfolio also includes Emporium, EmQuartier, Emsphere, and Paragon Department Store. Siam Piwat operates Bangkok flagship destinations including Siam Center, Siam Discovery, Siam Paragon, and ICONSIAM, as well as Siam Premium Outlets Bangkok.

Discount Stores, Hypermarkets, and Supercenters

Discount stores, hypermarkets, and supercenters primarily target middle- and lower-income consumers by offering food, beverages, household products, and other everyday goods at competitive prices. Major operators include [Lotus’s](#), [Big C](#), and [Tops](#). According to Euromonitor International, hypermarket retail sales in Thailand totaled approximately \$5.9 billion in 2025.

Wholesale-Retail Hybrid Stores

Wholesale-retail hybrid stores serve both business customers (i.e., hotels, restaurants, and caterers) and individual consumers. [GO Wholesale](#) and [Makro](#) are the leading operators in this segment. Their stores offer food ingredients, fresh and packaged foods, beverages, household products, and other supplies in both bulk and retail quantities.

Supermarkets

According to Euromonitor International, supermarket retail sales in Thailand reached approximately \$6.9 billion in 2025. Supermarkets generally target middle- and upper-income consumers and offer a broad selection of fresh foods, packaged products, and imported goods. Leading operators include [Tops](#), including Tops Market and other supermarket formats under the Tops brand; [Gourmet Market](#); [Foodland](#); [Villa Market](#); [Maxvalu Supermarket](#); and [Rimping](#).

Convenience Stores, Express Stores, and Mini-marts

According to Euromonitor International, convenience-store retail sales in Thailand totaled approximately \$17.9 billion in 2025. These outlets compete through accessible locations, extended operating hours, ready-to-eat foods, and competitively priced everyday products. They primarily serve local residents, commuters, and urban consumers seeking quick and convenient purchases. Major operators include [7-Eleven](#), [Lotus's Go Fresh](#), [Big C Mini](#), [Lawson 108](#), and [CJ MORE](#).

As shown in Table 2, convenience stores constitute Thailand's largest modern retail format by outlet count, with an estimated 21,884 locations in 2025. 7-Eleven led the segment with 15,595 outlets, accounting for approximately 71 percent of the convenience-store locations listed in the table. In comparison, the department store and hypermarket segments were highly concentrated among a small number of major operators. The supermarket segment was more diverse (see Table 2), comprising 491 outlets and led by Tops Supermarket and Lotus's. The extensive reach of these retail networks provides broad distribution opportunities for imported consumer-oriented food and beverage products, although successful market entry generally requires partnerships with established importers and distributors.

Table 2. Thailand: Estimated Number of Major Retail Outlets by Store Format in 2025

Major Department Store Outlets		Major Hypermarket Outlets	
Retailers	Number of Outlets	Retailers	Number of Outlets
Central Group	29	Lotus's	227
The Mall Group	6	Big C	156
Robinson	47	Tops	5
Total	82	Total	387
Major Supermarket Outlets		Major Convenience Store Outlets	
Retailers	Number of Outlets	Retailers	Number of Outlets
Lotus's	177	7-Eleven	15,595
Tops Supermarket	179	Lotus's go fresh	2,097
Big C Market	35	Big C Mini	1,602
Max Value	31	CJ Supermarket/ CJ More	1,500
Villa Market	35	Tops Daily+ Family Mart	523
Foodland	16	Shell Select	180
Gourmet Market & Home Fresh Mart	18	Lawson 108	230

		Jiffy	148
		Max Value Tanjai	9
Total	491	Total	21,884

Source: Krungsri Research 2026, Figures are estimates for 2025.

SECTION III: COMPETITION

Thailand’s imports of consumer-oriented agricultural products reached approximately \$9.3 billion in 2025, an increase of 11 percent from 2024. Continued demand for imported dairy products, processed foods, fresh fruits and vegetables, tree nuts, beef, and alcoholic beverages fueled growth.

The United States ranked as Thailand’s eighth-largest supplier of consumer-oriented agricultural products in 2025. U.S. products compete primarily on quality, food safety, reliability, innovation, and brand reputation. However, U.S. suppliers face strong competition from China, Australia, New Zealand, Japan, and neighboring ASEAN countries, which benefit from geographic proximity, shorter delivery times, established distribution networks, and generally lower prices.

Preferential tariff treatment under Thailand’s free trade agreements with ASEAN, China, Japan, Australia, and other trading partners further strengthens the price competitiveness of many imported products. In contrast, most U.S. products enter Thailand under most-favored-nation tariff rates, resulting in higher landed costs. U.S. suppliers are therefore generally most competitive in premium and differentiated market segments where quality, safety, consistency, and unique product attributes can justify higher prices.

The United States maintained its strongest competitive positions in soups and other food preparations, ranking second with a 14 percent market share, and tree nuts, ranking third with a 20 percent share (Table 3). The United States also held notable positions in dairy products and wine, with market shares of 7 percent and 9 percent, respectively. Competition was particularly strong in fresh fruit and beef (Table 3). These results indicate continued opportunities for premium and differentiated U.S. products, despite price and tariff advantages enjoyed by competing suppliers.

Table 3. Thailand: 2025 Imports of Consumer-Oriented Products and Competition

Product Category	Imports (\$ Million)	First Supplier	Second Supplier	U.S. Rank/Share
Dairy Products	1,325	New Zealand (42 percent)	Australia (11 percent)	3rd / 7 percent
Processed Vegetables	1,079	Laos (42 percent)	China (21 percent)	6th / 2 percent
Soups and Food Preparations	1,030	Singapore (28 percent)	United States (14 percent)	2nd / 14 percent
Fresh Fruit	836	China (62 percent)	Australia (8 percent)	4th / 4 percent
Tree Nuts	481	Indonesia (39 percent)	Vietnam (22 percent)	3rd / 20 percent

Chocolate and Cocoa Products	449	Malaysia (41 percent)	Indonesia (11 percent)	5th / 4 percent
Beef and Beef Products	343	Australia (82 percent)	Japan (9 percent)	4th / 1 percent
Distilled Spirits	193	United Kingdom (41 percent)	France (15 percent)	4th / 4 percent
Wine and Related Products	144	France (35 percent)	Australia (22 percent)	4th / 9 percent

Source: Trade Data Monitor

SECTION IV: BEST PRODUCT PROSPECTS CATEGORIES

Top Consumer-Oriented Products Imported from the World

Among the categories presented in Table 3, Thailand's largest consumer-oriented imports in 2025 were dairy products (\$1.3 billion), processed vegetables (\$1.1 billion), and soups and other food preparations (\$1.0 billion). Other significant categories included fresh fruit, tree nuts, chocolate and cocoa products, beef, distilled spirits, and wine. Growing demand for health-oriented, high-protein, functional, convenient, portion-controlled, and ready-to-consumer products presents opportunities for U.S. suppliers of value-added foods and beverages. (See: [Whey to Go—Riding the High-Protein Milk Wave with U.S. Ingredients](#); [Food Processing Ingredients Annual 2026](#))

Top Consumer-Oriented Products Imported from the United States

Compared with the prior year, the composition of leading U.S. consumer-oriented exports to Thailand remained stable, with food preparations, tree nuts, and dairy products continuing to account for a substantial share of U.S. sales. This consistency reflects sustained Thai demand for high-quality ingredients, health-oriented products, and convenient food options. Smaller categories—including fresh fruit, chocolate products, wine, distilled spirits, and beef—also offer opportunities for targeted growth, particularly through premium retail, foodservice, and tourism-related channels.

Products Present in the Market with Good Sales Potential

The strongest prospects for additional U.S. sales are products that already have an established presence but retain opportunities for further expansion:

Category	Prospects	Growth Drivers and U.S. Competitive Advantages
Food preparations	Sauces, condiments, meal solutions, protein and functional preparations	Convenience and health demand; U.S. suppliers offer formulation expertise, innovation, and consistent specifications.
Tree nuts	Almonds, pistachios, walnuts, pecans, ingredients, snacks	Health and protein positioning; established U.S. origin recognition, variety, and reliable grades.
Dairy	Cheese, whey protein, milk powders, lactose-free and functional ingredients	Bakery, foodservice, sports nutrition, and health applications; U.S. scale, technical support, and product range.
Fresh fruit	Apples, grapes, cherries, citrus, berries	Seasonal premium demand and gifting; U.S. varieties, quality programs, traceability, and promotional support.
Wine and spirits	Premium wine, bourbon, American whiskey, craft spirits, RTDs where permitted	Premium on-trade and specialty retail opportunities; distinctive origins, styles, and food-pairing narratives.
Chocolate and cocoa	Premium chocolate, baking products, confectionery ingredients	Premiumization and baking demand; U.S. brands and innovative formats can differentiate.
Beef	Premium chilled/frozen cuts and portion-controlled products	High-end foodservice demand; USDA grading, consistency, traceability, and differentiated grain-fed flavor.
Processed vegetables	Frozen potatoes, sweet corn, prepared vegetables, ingredients	Foodservice convenience and consistent supply; U.S. processing quality and standardized specifications.

Products Not Present in the Market with Good Sales Potential

Products with current market access and potential for further development include premium and health-positioned snack foods; plant-based and protein-rich snacks; sauces and meal solutions; frozen potato products; shelf-stable and selected frozen seafood products from approved establishments; specialty

cheese; functional food ingredients; and non-alcoholic or lower-alcohol beverage innovations compliant with Thai regulations. Exporters should confirm product eligibility, facility approval where required, labeling, registration, and applicable import conditions with a qualified importer before shipment.

Products Not Present in the Market Due to Significant Barriers

U.S. pork, beef offal, uncooked poultry, raspberries, persimmons, pomegranates, and avocados are not currently eligible for import or face significant market-access restrictions. Their commercial potential depends on the resolution of applicable sanitary and phytosanitary requirements and approval by the relevant Thai authorities.

SECTION V: POST CONTACT AND FURTHER INFORMATION

Government Regulatory Agency Contacts

1. Food and Drug Administration, Ministry of Public Health
Website: <https://en.fda.moph.go.th/home-contact-us/>,
Tel: +66 (0) 2590 7000, Email: saraban@fda.moph.go.th
2. Department of Livestock Development, Ministry of Agriculture and Cooperatives
Website: <https://dld.go.th/th/index.php/th/>
Tel: +66 (0) 2653 4444, Email: saraban@dld.go.th
3. Department of Fisheries, Ministry of Agriculture and Cooperatives
Tel: +66 (0) 2562 0600,
<https://www4.fisheries.go.th/>
Email: support@fisheries.go.th
4. Department of Agriculture, Ministry of Agriculture and Cooperatives
Website: <https://www.doa.go.th/en/>
Tel: +66 (0) 2579 0121 to 27, Email: saraban@doa.mail.go.th

For further information on government regulatory agency contacts, please see [Thailand: FAIRS Country Report Annual](#). The Foreign Agricultural Service (FAS) office in Bangkok maintains up-to-date information on food and agricultural import opportunities in Thailand and welcomes inquiries from U.S. suppliers to assist in accessing Thailand's market. Questions or comments regarding this report should be directed to:

Office of Agricultural Affairs
U.S. Embassy
Bangkok Thailand 10330
Tel: + 662 205-5106
Fax: +662 255-2907
Email: agbangkok@usda.gov

Attachments:

No Attachments