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Report Highlights:

In 2025, Thailand's economy is seeing only modest growth, but the foodservice sector remains resilient, with market value projected at \$35.4 billion and annual growth of about 5 percent. Operators are adapting to rising costs and fierce competition from Chinese chains by streamlining operations, innovating menus, and leveraging technology. Tourism, government support, and digital payment integration are driving demand for dining experiences and supporting sector growth. The industry continues to rely on imports, with 30–35 percent of food products sourced from abroad, including a wide range of U.S. food and beverage products.

Market Fact Sheet

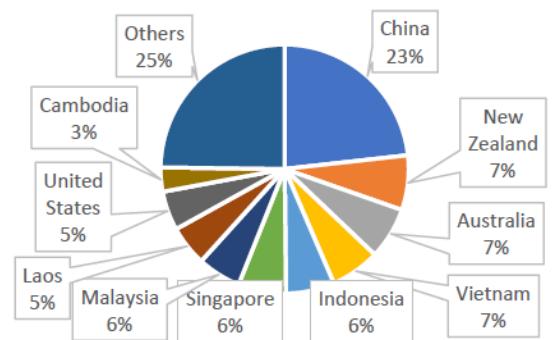
Executive Summary

Thailand, the second-largest economy in ASEAN in 2024, remains a significant trade partner for the United States, exporting \$5 billion in agricultural goods to the United States and importing \$1.4 billion. This positions Thailand as the 26th largest U.S. export market. In 2025, Thailand's economic growth is modest, with GDP projected to expand by 2.0 to 2.2 percent. Recovery is constrained by high household debt, which limits consumer spending, and weak global demand for Thai exports.

Imports of Consumer-Oriented Products

The United States was tied for 9th place, exporting \$492 million of consumer-oriented products in 2024.

Thailand's Imports of Consumer-Oriented Food and Agricultural Products in 2024



Food Retail Industry

In 2024, Thailand's food retail sales totaled \$7.9 billion, representing 6 percent of the country's \$132 billion in total retail sales and marking a 6 percent year-over-year increase. Despite economic pressures such as rising living costs and household debt, consumers are prioritizing essential goods and value-driven purchases.

Food Processing Industry:

Thailand is a major exporter of food and agricultural products, supported by a well-developed processing sector. As global demand for processed foods rises, Thai processors increasingly rely on imported raw materials not available domestically. In 2024, Thailand exported \$28 billion in processed food products and imported \$8.6 billion, including \$357 million from the United States.

Food Service (HRI) Industry

Thailand's foodservice is expected to grow by 5 percent this year with the market size of \$35.4

billion, supported by store expansion and a recovery in tourism sector.

Quick Facts 2024

Imports of Consumer-Oriented Products:

U.S. \$8.43 billion

List of Top 10 Growth Products in Host Country

1) Dairy products	2) Fresh vegetables
3) Seafood products	4) Food preparation
5) Fresh fruits	6) Bread, pastry, cakes
7) Tree nuts	8) Wine and beer
9) Chilled/frozen beef	10) Healthy beverages

Food Industry by Channels (U.S. billion) 2024

Retail Food Industry	\$7.9
Foodservice – HRI	\$32.8
Food Processing	\$36.0

Top Thailand Retailers

Supermarkets

- 1) Central Food Retail
- 2) Gourmet Market
- 3) Villa Market
- 4) Foodland
- 5) UFM Fuji Super
- 6) MaxValu

Hypermarket

- 1) Tesco Lotus
- 2) Big C

Convenience

- 1) 7-Eleven
- 2) Family Mart
- 3) Lawson 108

Cash and Carry

- 1) Makro
- 2) Go Wholesale

GDP/Population

Population (millions): 66.05 million

GDP (billions USD): \$551 billion

GDP per capita (USD): \$7,830

Strengths/Weaknesses/Opportunities/Challenges

Strengths

Well-established market with modern distribution channels

Weakness

Trade barriers on imported food & beverages to protect domestic producers.

Opportunity

Growing urban population and many international tourists

Challenge

Higher tariffs on U.S. products compared with countries with free trade agreements with Thailand.

Sources: Trade Data Monitor, Bank of Thailand

SECTION I: MARKET SUMMARY

As of late 2025, Thailand's economy is experiencing only modest growth, with GDP expansion projected between 2.0 and 2.2 percent according to projections from the World Bank and the Bank of Thailand. This relatively slow pace of economic recovery is primarily due to two factors including persistently high levels of household debt, which limit consumer spending, and continued weak demand for Thai exports in global markets.

Despite these economic challenges, Thailand's foodservice sector remains a bright spot. In 2025, the sector is estimated to reach a market value of \$35.4 billion, with foodservice expected to grow by approximately 5 percent by the end of the year. Several trends are fueling this resilience. First, the rapid expansion of cloud kitchens, commercial facilities that prepare food exclusively for delivery, has enabled restaurants to reach more customers while reducing overhead costs. Second, Thai consumers are increasingly seeking healthier dining options, prompting foodservice providers to adapt their menus to meet this demand. Together, these factors are helping the HRI industry outperform other sectors of the economy, even in a muted growth environment.

However, foodservice operators in Thailand are facing significant challenges to maintaining profitability. In July 2025, the government introduced a new policy setting the daily minimum wage at 400 baht for workers in hotels and entertainment venues located in major economic zones. This wage increase has led to higher labor costs for many businesses in the foodservice sector. At the same time, the market is experiencing a surge in competition from an influx of low-cost Chinese restaurant chains, which are attracting price-sensitive customers and putting downward pressure on menu prices across the industry. This combination of rising operational expenses and intensified price competition is making it increasingly difficult for foodservice establishments to sustain healthy profit margins.

As a result, many businesses are being forced to streamline their operations, such as by adopting more efficient workflows, reducing staff, or leveraging technology to cut costs. These adaptations are necessary for foodservice operators to remain competitive and viable in a challenging business environment.

Thailand's restaurants can be divided into following three categories:

Quick Service Restaurants (QSRs), also known as Limited-Service Restaurants, accounted for 17 percent of Thailand's Hotel, Restaurant, and Institutional (HRI) sector, with an estimated market value of \$6.1 billion. According to Euromonitor, there were 31,685 QSRs outlets in Thailand in 2024. Within this segment, burger-focused QSRs remained the best-performing category, with sales rising by 7.3 percent to \$378.9 million. Chicken-focused QSRs continued to dominate, achieving sales of \$924.7 million, a 3.2 percent increase from the previous year.

Table 1. Thailand: Quick Service Restaurant Sales

Sales in Quick Service Restaurants 2020 - 2024 (in millions of dollars)

Sales in Limited-Service Restaurant (Quick-Service Restaurants)	2021	2022	2023	2024	(2023-2024 % Change)
Convenience Stores Limited-Service Restaurants	\$ 2,365.54	\$ 2,864.27	\$ 3,230.49	\$ 3,382.19	4.70%
Chicken Limited-Service Restaurants	\$ 694.47	\$ 828.90	\$ 895.88	\$ 924.72	3.22%
Others Limited-Service Restaurants	\$ 478.08	\$ 612.53	\$ 666.25	\$ 640.59	-3.85%
Bakery Limited-Service Restaurants	\$ 250.77	\$ 311.06	\$ 340.04	\$ 348.82	2.58%
Pizza Limited-Service Restaurants	\$ 232.82	\$ 240.30	\$ 262.81	\$ 266.70	1.48%
Burger Limited-Service Restaurants	\$ 201.29	\$ 259.12	\$ 353.17	\$ 378.92	7.29%
Ice Cream Limited-Service Restaurants	\$ 83.05	\$ 114.08	\$ 117.48	\$ 119.85	2.02%
Asian Limited-Service Restaurants	\$ 11.40	\$ 15.28	\$ 16.64	\$ 16.50	-0.88%
Total Limited-Service Restaurants	\$ 4,317.41	\$ 5,245.53	\$ 5,882.76	\$ 6,078.29	3.32%

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources.

Despite the gains, limited-service restaurants or QSRs have experienced a slowdown in both sales growth and outlet expansion compared to the previous year. This trend is driven by the rising cost of living, ongoing economic uncertainty, and increasing consumer price sensitivity. Thai consumers are now more cautious about discretionary spending, prioritizing value for money and carefully considering their choices when dining out.

In response to tougher market conditions, many QSR operators have increased their use of promotional discounts and introduced more value-focused menu options to attract and retain customers. The competition has become even fiercer as Chinese chains like Zhengxin Chicken have launched aggressive price wars, prompting major Thai QSR brands to counter with their own significant price promotions. At the same time, rising operating costs such as the new 400-baht daily minimum wage are putting additional pressure on businesses. To manage these expenses, many QSRs are investing in automated ordering kiosks and reducing staff to streamline operations and protect their profit margins.

Despite these challenges, some new entrants are taking a different approach. For example, Shake Shack recently opened a branch in Bangkok. Rather than competing mainly on price, Shake Shack focuses on building its brand and offering high-quality products. This strategy aims to create strong customer loyalty and support long-term growth, even in a highly competitive market.

Full-Service Restaurants (FSRs) accounted for 15 percent of Thailand's foodservice sector in 2025, with an estimated market value of \$5.4 billion and growth of approximately 5–6 percent. The sector is shifting away from the post-pandemic focus on ultra-luxury fine dining, as consumers increasingly favor restaurants that provide high-quality food and service at more reasonable prices. This trend reflects a growing demand for establishments that deliver premium experience while remaining affordable.

Table 2. Thailand: Full-Service Restaurant Sales

Sales in Full-Service Restaurants 2021 - 2024 (in millions of dollars)

Sales in Full-Service Restaurant	2021	2022	2023	2024	(2023-2024 % Change)
Asian Full-Service Restaurants	2,601.10	3,588.69	4,037.46	4,332.19	7.30%
Others Full-Service Restaurants	333.46	410.76	448.01	452.30	0.96%
North American Full-Service Restaurants	206.43	276.11	313.19	331.33	5.79%
Pizza Full-Service Restaurants	141.05	143.20	146.74	152.20	3.72%
European Full-Service Restaurants	119.68	141.45	156.18	168.52	7.90%
Total Full-Service Restaurants	3,401.72	4,560.21	5,101.59	5,436.54	6.57%

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources.

Sales in Full-Service Restaurants 2021 - 2024 (in millions of dollars)

Sales in Full-Service Restaurant	2021	2022	2023	2024	(2023-2024 % Change)
Full-Service Chain Restaurants	1,232.50	1,653.50	1,826.65	2,045.01	11.95%
Independent Full-Service Restaurants	1,969.12	2,638.46	2,998.11	3,391.53	13.12%
Total Full-Service Restaurants	3,201.62	4,291.96	4,824.76	5,436.54	12.68%

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources.

Full-Service Restaurants operators are adapting to financial pressures from the newly implemented 400-baht daily minimum wage and limited opportunities for automation compared to Quick Service Restaurants. Many are streamlining operations by reducing menu items by 20 to 30 percent to simplify kitchen processes and restructuring staff responsibilities. This often involves assigning more complex customer service and sales tasks to experienced staff, while routine duties such as delivering food and clearing tables are handled by employees in lower-wage positions. The sector is also seeing a renewed interest in traditional Thai comfort food, now prepared with premium ingredients, alongside a growing emphasis on healthier menu options to meet evolving customer preferences. Experience is increasingly important, with diners seeking memorable and engaging environments. While low-cost Chinese chains intensify competition in the QSR segment, the casual dining in this sector faces disruption from the rise of premium Chinese hotpot concepts. Investment is also shifting from the saturated Bangkok market to "destination dining" in secondary cities such as Chon Buri and Khao Yai, where visually appealing and experiential venues attract domestic travelers seeking both quality and unique dining experiences.

U.S. full-service restaurant brands, such as The Cheesecake Factory which now operates one branch in Thailand bring the authentic American dining experience to Thai consumers. These establishments not only offer high-quality ingredients but also recreate the atmosphere and service that customers associate with dining in the United States. This approach appeals to loyal customers who have previously lived or traveled in the U.S., allowing them to relive their experiences and enjoy a sense of familiarity.

The Café and Bar landscape in 2025 is shaped by a dynamic mix of health-conscious lifestyles, regulatory relaxation, and a clear shift toward localization. The sector is moving away from the dominance of standardized international chains, as consumers increasingly seek premium experiences that offer quality and social appeal without the high prices of global franchises. This evolution is visible across all categories, from high-end smoothies to local craft beer, driven by a desire for products that reflect a specific lifestyle image on social media while remaining affordable amid rising living costs.

Table 3. Thailand: Café and Bar Sales

Sales in Cafés and Bars 2021 - 2024 (in millions of dollars)

Cafés and Bars	2021	2022	2023	2024	(2023-2024 % Change)
Bars/Pubs	1,738.82	6,135.84	6,796.67	7,106.50	4.56%
Specialist Coffee and Tea shops	878.23	1,108.97	1,260.64	1,384.89	9.86%
Café	250.58	324.45	364.48	383.24	5.15%
Juice/Smoothie Bars	16.94	19.52	29.19	43.95	50.59%
Total Cafés and Bars	2,884.57	7,588.78	8,450.98	8,918.59	5.53%

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources.

The juice and smoothie segment is the fastest-growing category, fueled by ongoing wellness trends and celebrity endorsements. Inspired by the American *"Erewhon"* model, these venues market their beverages as status symbols of premium blends of nutritious fruits and superfoods. Brands like Boost Juice, Oh! Juice, and LeLe Juice are positioning themselves as essential lifestyle choices. At the same time, premium tea bars influenced by Taiwanese, Chinese, and Japanese trends such as CHAGEE, Mixue, etc. are gaining ground. These venues combine stylish branding with high-quality ingredients at competitive prices, challenging established players and resonating with younger consumers. In the coffee sector, economic pressures are prompting a shift from expensive international chains to local specialty shops. Consumers are not compromising on quality; instead, they are seeking better value from local brewers who offer superior beans and craftsmanship. Local brands such as Roots, Beans Coffee, Rise Coffee, 101 & Co., etc. These establishments are attracting discerning customers who appreciate both the elevated coffee experience and the value offered by local expertise. This shift is also expanding beyond Bangkok into secondary cities, where authentic experiences appeal to both domestic travelers and tourists seeking genuine cultural connections.

The industry is also being reshaped by significant regulatory relaxation, creating a more flexible environment for business owners. The easing of afternoon alcohol sales bans and the liberalization of craft beer packaging have allowed smaller local producers to distribute their products more widely in cans and bottles. This has blurred the distinction between daytime cafes and evening bars, with many venues transitioning seamlessly from serving functional coffee to offering natural wines and craft beers at night. In the nightlife sector, consumer palates are evolving toward more complex profiles, favoring "gastronomic" cocktails that utilize savory Thai ingredients like spices, herbs, and chili over traditional sweet syrups.

Small Restaurants (SMEs) make up more than 80 percent of all restaurants in Thailand, with most operating as street food stalls serving local comfort foods and desserts such as noodles and Thia-easy a la carte dishes. These businesses often expand in tandem with the growth of office and residential areas. However, street vendors are now facing growing competition from food outlets located in shopping centers and office buildings, especially in Bangkok. Most newly established buildings now include dedicated dining complexes or areas and often invite well-known street food vendors to open shops within these spaces. This approach allows customers to enjoy popular street food in a cleaner, more convenient, and enjoyable environment.

To summarize, in 2025, Thailand's foodservice sector is navigating a complex landscape. While the market continues to grow, operators are finding it increasingly difficult to maintain profitability as costs

rise and margins shrink. Businesses are under pressure from all sides: food prices have surged, labor is more expensive due to higher minimum wages and shortages, and rents in prime locations have climbed above pre-pandemic levels. The exit of Foodpanda has left only GrabFood and LINE MAN in the delivery market, reducing restaurants' bargaining power and exposing them to higher fees and stricter terms. At the same time, aggressive expansion by Chinese restaurant chains has sparked intense price wars, making it tough for smaller local players to compete, especially in popular segments like hotpot and sushi. The industry also faces a labor shortage, relying heavily on migrant workers amid unstable border policies, while experienced Thai staff are leaving for better opportunities abroad or in hotels. On top of these challenges, high household debt is making consumers more cautious, with many opting for value options such as set menus and food courts, while only the cheapest street food and the most exclusive luxury dining continue to perform well.

On the other hand, there are promising opportunities for growth. Businesses that adapt and innovate are well positioned to benefit from several positive trends. Tourism remains a powerful driver, with the number of visitors expected to reach or surpass pre-pandemic levels, bringing about 41 million arrivals. This influx boosts demand for street food, night markets, and unique dining experiences. The integration of Thai QR payment systems with popular Chinese apps like Alipay and WeChat Pay has made it easier for Chinese tourists to spend, even at small street stalls. The global popularity of Thai cuisine, amplified by movies and social media, means many visitors arrive eager to try famous local dishes, often resulting in long lines at well-known eateries.

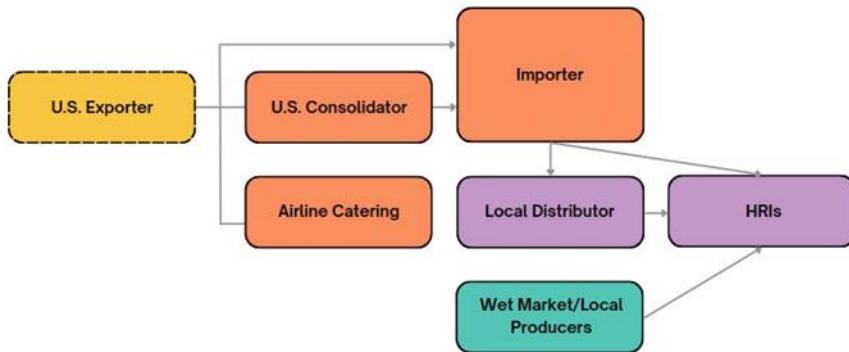
Government support is also helping the sector thrive. The "*Khon La Khrueng*" (Half-Half) program, which covers half of restaurant bills up to a daily limit, encourages people to eat out more often, especially at small and medium-sized restaurants. Tax rebates for domestic travel motivate Thais to visit provinces beyond major cities, increasing food spending in those areas. Operational efficiency and technology are now essential for restaurant profitability. Digital payments like PromptPay are widely used, making transactions faster and more secure. Many restaurants use Thai QR code ordering, which streamlines services and helps collect customer data, allowing them to market directly to their customers and rely less on third-party delivery platforms. These innovations are strengthening customer relationships and improving the bottom line, helping businesses thrive in a challenging environment.

The HRI sector in Thailand sources approximately 30–35 percent of its food products from imports. In 2024, Thailand imported \$429 million worth of U.S. consumer-oriented food products. Foodservice operators in this sector frequently bring in a wide range of U.S. items, including beef, seafood, cheese, frozen potatoes, seasonings, fresh and dried fruits, nuts, bakery fillings, fruit juices and concentrates, wines, craft beer, and health and wellness products.

Advantages and Challenges Facing U.S. Food and Beverage Products in Thailand

Advantages	Challenges
<p>High Quality and Trust Standards U.S. products maintain a reputation for safety. This has evolved into a specific demand for "High-end Preserved Foods" and shelf-stable premium items.</p>	<p>Intense Price Competition The market remains highly saturated due to both global oversupply and robust local production, especially seafood and fresh fruit, resulting in fierce price competition. This environment makes it challenging for standard U.S. commodities to compete unless they offer distinctive branding or added value.</p>
<p>Health & Wellness Functional Focus Demand has shifted from general "healthy" to "Functional & Medical Nutrition." The variety of U.S. product are in high demand. Including medical foods for the aging population, plant-based proteins, and beverages with added benefits (electrolytes, vitamins) that don't rely on sugar.</p>	<p>Regulatory Issues Navigating Thailand's regulatory environment including import regulations and food safety standards can be complex and time-consuming. The introduction of the new "License per Invoice" system has further increased the administrative burden and extended clearance times.</p>
<p>Brand Recognition Many of U.S. food and beverage brands are globally recognized, providing a sense of familiarity and trust for consumers.</p>	<p>Price Sensitivity Tourists and local consumers may be price-sensitive, making it difficult for premium-priced U.S. products to compete with more affordable local options.</p>
<p>Wide Range of Products The variety of U.S. Food and beverage products caters to the wide range of consumer tastes, enhancing their dining experience with a wide range of options.</p>	
<p>Culinary Innovation The "Fancy Grocery" trend is growing on Thai social media. U.S. products with innovative packaging or "designer" ingredients are popular for their visual appeal and status, driving sales in premium retail channels. U.S. products often introduce innovative flavors and ingredients, appealing to consumers looking for unique and memorable culinary experience.</p>	

SECTION II: ROAD MAP FOR MARKET ENTRY



New-to-market exporters should conduct comprehensive market research to identify target customers and appropriate distribution channels. Visiting Thailand is essential for gaining firsthand market insights. U.S. exporters are encouraged to determine the most effective distribution channels such as local importers, distributors, retailers, and food service providers and to establish strong relationships with their representatives.

Direct engagement with local food service importers is the most effective strategy for U.S. exporters seeking access to the Thai market. These importers maintain established relationships with key HRI businesses and possess a deep understanding of local customer preferences. Most businesses, including major QSR brands, hotels, resorts, and full-service restaurants, do not import food and ingredients directly. Instead, they rely on food service importers or affiliated companies to serve as distributors. Five-star hotels, resorts, and international restaurants in tourist destinations such as Bangkok, Phuket, Pattaya, Samui, and Chiang Mai are among the largest users of U.S. products, but they typically do not import food directly in volumes attractive to U.S. exporters.

Food exhibitions and trade shows provide excellent opportunities for U.S. exporters to introduce new products and build relationships with Thailand's foodservice operators, chefs, and other industry professionals. Participation in these events offers significant exposure for U.S. companies and products. THAIFEX-Anuga Asia and Fi Asia are Thailand's largest food and beverage trade shows. Upon request, FAS Bangkok can provide U.S. companies with a list of importers and highlight U.S. food and ingredient products at both THAIFEX-Anuga Asia and Fi Asia exhibitions.

Given the market landscape in late 2025, U.S. exporters should focus on differentiation through quality and health to stand out against aggressive price competition from low-cost Chinese chains. U.S. suppliers can leverage the strong wellness trend by promoting ingredients such as dried fruits, nuts, and juice concentrates for use in the rapidly growing smoothie and premium juice segment, which is inspired by status-oriented American brands. Exporters should also target consumers seeking unique experiences by supplying premium beef, seafood, and cheese to "destination dining" venues in secondary cities, where domestic travelers are increasingly looking for distinctive culinary offerings. Additionally, craft

beer and wine producers can benefit from recent regulatory changes by entering the expanding café-bar hybrid market, where many venues are now serving alcoholic beverages in the evenings alongside their traditional coffee offerings.

SECTION III: COMPETITION

U.S. agricultural exports to Thailand face fierce competition from both local Thai products and imported products from countries with free trade agreements (FTAs). Local Thai products are often preferred by consumers due to their familiarity and lower cost. Additionally, countries with FTAs benefit from reduced tariffs and other trade advantages, making their products more competitive in terms of price and accessibility. This dual competition creates a challenging environment for U.S. agricultural exports, as they must compete on both quality and price to gain market share in Thailand.

The best U.S. food and beverage products for the Thai market include:

- Meat: frozen and chilled beef;
- Potatoes: frozen fries, dehydrated potatoes;
- Fresh and frozen seafoods: fish fillets, scallops, lobsters, mussels, oysters, salmon, halibut, cod fish, Alaksa king crab, etc.;
- Poultry: turkey;
- Dairy products: cheese, processed cheese, whipped cream, cream cheese, artisanal cheese, dips, snack cheese;
- American spices and seasonings;
- Bakery and baking products: flour, biscuits, pancake mixes, waffles, cookies, muffins, cakes, frosting and icings, and puff pastries;
- Beverages: fruit and vegetable juices, wines, liquors, whiskies, cocktail mixes, and healthy beverages;
- Dried fruits and nuts;
- Canned foods: soup, fruits and vegetables;
- Condiments: bacon bits & toppings, barbecue and cocktail sauce, dips, hot sauce or pepper sauce, mayonnaise, mustard, olives, salsa and taco sauce, pickles, steak sauce, syrups, salad dressing and vinegar;
- Fresh fruit: apples, table grapes, cherries, blueberries, grapefruit, oranges, pears, peaches;
- Jams, jellies, and spreads;
- Snacks, candies, and popcorn;
- Health and wellness products;
- Plant-based products; and
- Alternative protein and dairy products.

SECTION IV: POST CONTACT AND FURTHER INFORMATION

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 comment regarding this report should be directed to:

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Attachments: [Thailand Imports of Consumer Oriented Products 2024.docx](#)