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Report Highlights:

Thailand remains one of Southeast Asia's leading markets for imported food and agricultural products, with total agricultural imports reaching $23.5 billion in 2025, including $1.7 billion from the United States. Strong tourism, expanding modern retail and foodservice sectors, and a well-developed food processing industry continue to drive demand for imported consumer-oriented products. Despite slower projected economic growth in 2026, rising urbanization, changing consumer lifestyles, and demand for premium and convenience foods support positive long-term market prospects. Opportunities for U.S. exporters remain strong in dairy products, beef, tree nuts, fresh fruit, processed foods, seafood, wine, and other high-value consumer-oriented products.

Market Fact Sheet: Thailand

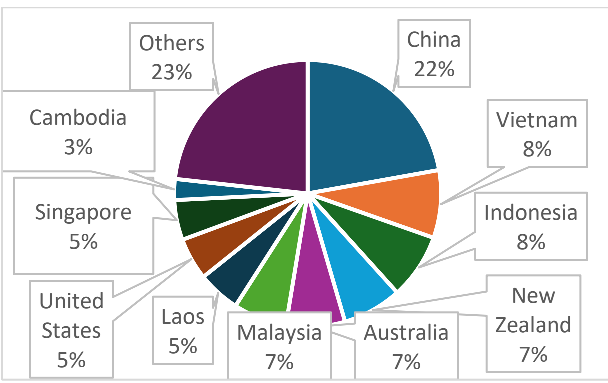
Executive Summary

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 consumer, food service, 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 $407 million. Thailand's total 2025 import value of consumer-oriented products was $9.4 billion, a 11 percent increase from 2024.

Consumer-Oriented Agricultural Imports



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

Quick Facts: CY 2025

Imports of Consumer-Oriented Products:
$9.4 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	Hypermarkets
1) Central Food Retail	1) Lotus
2) Gourmet Market	2) Big C
3) Villa Market	Convenience Stores
4) Foodland	1) 7-Eleven
5) MaxValu	2) Lawson 108
6) CJ Supermarket	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

Food Service Industry:

Thailand's consumer foodservice market reached approximately $30.2 billion in 2025, driven by tourism recovery, urbanization, and demand for convenience. Growth was supported by expanding quick-service restaurants, cafés, and delivery platforms, while consumers increasingly sought value-oriented, premium, and healthier dining options.

Strengths/Weaknesses/Opportunities/Challenges

Strength	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 Overview

Economy

According to the National Economic and Social Development Council (NESDC), Thailand's economic outlook as of April 2026 indicates a potential slowdown in growth, with GDP expansion projected at as low as 0.2 percent under a severe downturn scenario. This outlook reflects external risks, including geopolitical tensions in the Middle East, which have contributed to volatility in global energy prices and increased uncertainty in the external economic environment.

Despite these risks, Thailand's performance in 2025 remained resilient. The economy expanded by 2.4 percent, with growth reaching 2.5 percent in the fourth quarter. Economic expansion was supported by continued recovery in exports, strength in tourism, and steady growth in both public and private investment. Non-agricultural sectors remained the primary driver of overall economic activity.

Thailand Food Industry

In 2025, Thailand ranked as the world's ninth-largest exporter of agricultural and food products, with exports valued at approximately $51 billion, reflecting a marginal 0.2 percent increase from 2024 (Trade Data Monitor). Total merchandise exports reached $339.6 billion, up 12.9 percent year-on-year, driven primarily by electronics and electrical appliances, while agricultural exports were broadly stable. Agricultural and food products accounted for approximately 15 percent of total exports (Office of Trade Policy and Strategy, Ministry of Commerce).

Thailand's agricultural and agro-industrial exports showed mixed performance in 2025. While traditional bulk commodities softened, processed and value-added food products, particularly seafood and shrimp, continued to expand, highlighting ongoing sectoral upgrading. Key export markets included China, the United States, ASEAN, Japan, India, the United Kingdom, and South Korea.

Thailand remains an important market for U.S. agricultural exports. In 2025, using Thailand data, total agricultural imports from all origins reached approximately $23.5 billion, including $1.7 billion from the United States, an increase of 17 percent from 2024. Thailand's total imports of consumer-oriented products reached $9.4 billion, up 11 percent year-on-year. The United States was the 8th largest supplier of consumer-oriented agricultural products.

Leading U.S. consumer-oriented exports included dairy products, soup preparations, tree nuts, fresh fruit, processed vegetables, chocolate and cocoa products, beef, distilled spirits, and wine. Continued growth in dairy ingredient demand reflects the expansion of Thailand's food processing and nutrition industries. In addition, rising urbanization projected to reach 58 percent by 2030 continues to support demand through modern retail and foodservice channels.

Bilateral trade in consumer-oriented agricultural products remained robust over 2021–2025. According to U.S. Census Bureau data, exports to Thailand reached $407.2 million in 2025, while Thai exports to the United States increased steadily to $2.9 billion, resulting in a widening U.S. trade deficit in this category from $1.7 billion in 2021 to $2.5 billion in 2025, reflecting sustained U.S. demand for Thai food products.

Table 1. United States: Trade in Consumer-Oriented Ag Products with Thailand between 2021 and 2025 (Value: $ million)

Calendar Year	2021	2022	2023	2024	2025
U.S. Exports to Thailand	396.0	453.4	383.7	411.7	407.2
U.S. Imports from Thailand	2,079.7	2,599.0	2,099.2	2,514.4	2,887.3
Trade Balance	*-1,683.3*	*-2,145.7*	*-1,715.5*	*-2,102.7*	*-2,480.1*

Source: U.S. Census Bureau / Global Agricultural Trade System (GATS).

Market Outlook

Thailand's food market is expected to maintain steady growth in 2026, supported by favorable demographic trends, a recovering tourism sector, expanding modern retail channels, and continued demand for higher-value food products. According to Statista Market Insights, the market generated approximately $75 billion in 2025 and is projected to grow at an average annual rate of 4.9 percent during 2025–2030.

Thailand's evolving consumer landscape continues to support growth in processed and convenience foods. Rising urbanization, increasing labor force participation, and the growth of smaller households have encouraged greater demand for time-saving meal solutions, including ready-to-eat and ready-to-cook products. Krungsri Research projects that processed foods, convenience products, and the expansion of foodservice channels will remain key drivers of market growth. The continued development of supermarkets, convenience stores, and e-commerce platforms has improved product availability and strengthened nationwide distribution networks. Krungsri Research forecasts annual growth of approximately 2.3–3.3 percent for the ready-to-eat food segment through 2028.

Thailand's foodservice sector remains one of the most dynamic channels for imported food and beverage products. Valued at approximately $30.2 billion, the sector continues to benefit from strong tourism arrivals, increased consumer spending outside the home, and the expansion of restaurants, cafés, hotels, and food delivery services. Growing demand for premium dining experiences and international cuisines has increased opportunities for imported products, particularly among hotels, upscale restaurants, and Western-style foodservice operators. As a result, the foodservice sector represents the most attractive channel for U.S. consumer-oriented exports, including beef, dairy products, seafood, fresh fruits, wine, and specialty food products.

Thailand's well-developed food manufacturing industry also supports long-term demand for imported food ingredients and agricultural commodities. As a leading regional food processing and export hub, Thailand continues to invest in value-added food production, innovation, and product development to serve both domestic and international markets.

While short-term challenges remain, including slower economic growth, elevated household debt levels, and uncertainty in global trade conditions, Thailand's medium- to long-term outlook remains positive. Strong consumer fundamentals, an established food processing industry, and the country's strategic role as a regional distribution and tourism hub are expected to support continued growth in food consumption and import demand.

Advantages and Challenges

Advantages	Challenges
Strong Consumer Demand and Expanding Foodservice Food and non-alcoholic beverages remain among the largest categories of household expenditure in Thailand. Continued growth in tourism, dining-out trends, and the expansion of the food service sector support demand for imported food and beverage products.	Tariffs and Complex Import Procedures Certain U.S. agricultural products face relatively high tariffs, along with complex import licensing, documentation, and regulatory requirements.
Young, Globally Influenced Consumers Approximately one-quarter of Thailand's population is aged 15–34, with increasing exposure to Western lifestyles, international cuisine, and modern retail channels, driving demand for imported foods.	Preferential Trade Agreements with Competitors Thailand's free trade agreements (FTAs) with ASEAN, China, Japan, and Australia provide tariff advantages to competing suppliers, reducing U.S. price competitiveness in key categories.
Regional Distribution Hub Thailand serves as a key re-export hub for mainland Southeast Asia, supporting additional market opportunities in Laos, Cambodia, and Burma (Myanmar).	Strong Domestic Food Industry Thailand's established food processing sector actively substitutes imports with competitively priced local products, particularly in snacks, sauces, and ready-to-eat meals.
Rising Incomes Outside Bangkok Expanding purchasing power in secondary cities is increasing demand for packaged, premium, and imported food products beyond traditional urban centers.	Urban Market Concentration Demand for imported food products remains heavily concentrated in Bangkok and major tourist destinations, limiting nationwide penetration.
Growing Demand for Health and Functional Foods Food manufacturers increasingly seek functional ingredients, plant-based proteins, and health-oriented inputs to support product innovation and export-oriented production.	Retail Consolidation Large retail groups dominate distribution channels, influencing pricing, shelf space allocation, and product listing decisions.
Premiumization in Foodservice Hotels, restaurants, and specialty retailers are expanding demand for premium imported products, including specialty meats, cheese, wine, and gourmet ingredients.	Market Protection in Sensitive Sectors Products such as poultry, pork, and offal face strict import controls, quotas, and other sanitary restrictions, limiting market access.
Potential Trade Liberalization Ongoing discussions on reciprocal trade frameworks may improve future market access conditions for U.S. agricultural exports.	Regulatory and SPS Barriers Sanitary and phytosanitary requirements, labeling rules, and product registration procedures can increase compliance costs and delay market entry.

Section II. Exporter Business Tips

Market Research

- FAS Bangkok (Post) encourages U.S. exporters to conduct in-market research, including product sampling, price benchmarking, competitor analysis, and assessment of consumer preferences.
- Selecting appropriate distribution channels—such as local importers, distributors, retailers, and food service operators—is critical for market entry. Establishing strong relationships with local partners can facilitate access to Thailand's consumer-oriented food market.
- Post regularly publishes analysis on Thailand's policy and market developments with potential implications for U.S. agricultural trade at https://www.fas.usda.gov/data/gain.

Business Partners

- Post advises U.S. exporters to work with established local representatives or agents with strong connections to target customers, including retailers, hotels, restaurants, and food processors, as well as knowledge of Thai food regulations and import procedures.
- Engagement with relevant government agencies and regulatory authorities may also support effective market entry and compliance.
- Post encourages exporters to participate in trade missions and promotional activities organized by state and regional trade associations, (e.g., Food Export USA, the Western United States Agricultural Trade Association, the Southern United States Trade Association, California Wine Institute, etc.). These organizations collaborate with FAS Bangkok and can provide market insights and importer connections.

Local Business Customs and Market Trends

- Product adaptation to local preferences, including taste profiles, packaging, and pricing, is important for market acceptance.
- Trade shows also play a key role in market development and business matchmaking. Key USDA-endorsed trade events in Thailand include VIV Asia Thailand 2027 (March 10-12, 2027), THAIFEX - Anuga Asia, May 25-29, 2027 for food retail and foodservice products, FI Asia-Thailand 2027 (September 1-3, 2027) for food ingredients and processing, and for animal feed and livestock products. Additional trade show information is available in the 2026 Thailand Agricultural Tradeshows and Conferences report.
- Reliable supply, consistent product quality, technical support, and timely communication are important factors in maintaining business relationships, with responsiveness typically expected within 24 hours.
- In the Thai market, product quality, branding, packaging, and pricing are key considerations, particularly among middle- and upper-income consumers, who demonstrate a strong preference for premium and well-established brands.
- U.S. exporters may request lists of potential importers from FAS Bangkok at agbangkok@usda.gov.

General Customer Tastes and Trends:

Evolving Household Dynamics and Consumption Patterns

The rise in small households is driving increased demand for smaller package sizes and convenient, ready-to-eat or easy-to-prepare food products.

Health and Wellness Focus

Restaurants and retailers are increasingly developing products and services aligned with growing consumer emphasis on health and wellness. For further information, please see Thailand Food Processing Ingredients Annual 2026. Additional market trend analysis for retail and food service sectors is available in Thailand-Food Service-Hotel Restaurant Institutional Annual 2025

Key Industry Trends

Thailand's food and beverage industry is shaped by several key trends: holistic wellness, convenience and premiumization, sensory and experiential dining, and evolving demographic and socio-economic factors. These trends are supported by food technology innovation and industry adaptation to changing consumer preferences, reinforcing Thailand's position as a dynamic market focused on well-being, experience, and inclusivity, and strengthening its reputation as a leading food destination. For comprehensive analysis, please see Thailand Food & Beverage Trends to Watch For 2026.

U.S. Beef Export Opportunities

Thailand presents strong growth potential for U.S. beef exports, particularly in the frozen beef segment, despite competition from tariff-free products from Australia, Japan, and New Zealand. According to Euromonitor International, Thailand's overall beef demand is forecast to grow by an average of 6.1 percent annually from 2010 to 2029. While Thai importers slowed imports of U.S. beef in 2025 pending clarity on tariff developments, underlying demand for high-quality imported beef remains robust, creating favorable long-term opportunities for U.S. exporters. For additional information, please see Thailand: American Beef Market Opportunities 2025

Additional Market Intelligence

Please see:

- Thailand Petfood Market 2025
- Alcohol Beverage Control Act 2025 Situation Report
- Updated List of Foreign Halal Certification Bodies for 2025
- 2026 Thailand Agricultural Related Trade Shows and Conferences

Section III. Import Food Standards & Regulations/Import Procedure

FAIRS Country Report Annual 2026 contains information on food laws, labeling requirements, regulations on food additives, pesticides, contaminants, import procedures, and other standards. Please contact the FAS Bangkok at agbangkok@usda.gov with specific product-related inquiries.

Section IV. Market Sector Structure & Trends

Consumer Spending Growth

Euromonitor forecasts Thailand's consumer market to expand by 19.9 percent in real terms from 2024 to 2029, with food and non-alcoholic beverages remaining the largest category of consumer spending. This robust growth trajectory underscores the continued importance of the food sector in Thailand's consumer economy.

Health and Wellness Focus

Thai consumers increasingly emphasize health-driven consumption, actively seeking healthier food options across product categories. This trend is driven by rising awareness of health issues such as obesity and diabetes, resulting in heightened demand for products with improved nutritional profiles, including reduced sugar, lower sodium, and enhanced functional ingredients.

Value-Oriented Purchasing

Thai consumers increasingly prioritize value in their food purchases, with 31 percent regularly opting for private label or low-cost products to manage household budgets effectively, according to Euromonitor. This trend reflects consumers' strategic approach to balancing quality and affordability in their purchasing decisions.

These trends, sustained spending growth, health consciousness, and value orientation, are reshaping Thailand's food market structure and creating opportunities for products that address multiple consumer priorities.

Thai Consumers' Expenditures on Food (2021-2025)

Thailand's consumer market remains one of the largest in Southeast Asia and continues to offer growth opportunities for food and agricultural products. Supported by economic development, urbanization, and rising disposable incomes, Thai consumers have steadily increased their spending on food and non-alcoholic beverages. According to Euromonitor International, food expenditure increased from approximately $63.5 billion in 2021 to an estimated $78.3 billion in 2025, representing growth of more than 23 percent over the five-year period.

Euromonitor estimates that Thai consumers increased food spending by 4 percent between 2024 and 2025 and projects continued growth through 2030. Food and non-alcoholic beverages remain a major component of household expenditure, reflecting sustained demand for a broad range of products across retail and food service channels. Growing consumer interest in product quality, convenience, variety, and premium offerings is expected to support continued market expansion and create opportunities for imported food and beverage products (Table 2).

Table 2. Thailand: Consumers' Expenditures on Food (2021-2025)

Unit	2021	2022	2023	2024	2025
$ billion	63.52	68.96	72.50	75.43	78.27

Source: Euromonitor International

Retail Sector and Trends

Thailand's retail industry continued to evolve and improve, driven by increasing consumer demand for convenience. Food and beverage sales are a key component of the country's retail industry. Urbanization, rising disposable incomes, changing consumer preferences, an increasing focus on health and sustainability are important influences in Thailand's food retail sector (see Thailand Retail Food Annual 2025)

Alcoholic Drinks and Trends

Thailand's alcoholic drinks market maintained positive growth in 2025 and early 2026, supported by tourism recovery and stronger on-trade consumption. Total volume sales increased, supported largely by the recovery of international tourism, particularly in major destinations such as Bangkok and Phuket. However, growth slowed compared to the previous year due to weaker domestic purchasing power and ongoing economic pressures affecting local consumers. As a result, consumers increasingly shifted toward more affordable alcoholic beverage categories, including beer and ready-to-drink (RTD) products.

Consumer expenditure on alcoholic drinks in Thailand, as shown in Table 3, increased steadily during 2021–2025. Growth was driven by the recovery of tourism, the reopening of on-trade channels, and rising consumer demand for premium alcoholic beverages. Despite economic pressures affecting household purchasing power, expenditure continued to expand due to higher consumption in tourist areas, ongoing product innovation, and growing interest in premium and RTD alcoholic beverages.

Table 3. Thailand: Consumer Expenditure on Alcoholic Drinks (2021-2025)

Unit	2021	2022	2023	2024	2025
$ billion	5.12	5.35	5.65	5.99	6.14

Source: Euromonitor International

Premiumization remains a key trend in Thailand’s alcoholic beverage market, particularly among middle- and upper-income consumers who increasingly favor higher-quality products with distinctive characteristics. Demand for premium imported wines and spirits continues to grow, supported by expanding tourism, rising disposable incomes, and greater consumer interest in premium dining and beverage experiences.

Health and wellness considerations are also influencing consumption patterns, driving demand for lower alcohol and lighter beverage options. This trend has supported growth in beer and ready-to-drink (RTD) products while increasing competition within the spirits category. In response to evolving consumer preferences, producers continue to introduce premium and innovative products. Recent examples include Boon Rawd Brewery’s launch of Leo Supreme in the premium beer segment and Thai Beverage’s introduction of Prakaan single malt whisky targeting higher-income consumers.

Regulatory changes are expected to support further development of the craft spirits sector by providing smaller producers with greater production flexibility. Combined with growth in tourism, foodservice, and on-trade consumption channels, these trends are expected to continue shaping Thailand’s alcoholic beverage market, creating opportunities for premium imported products, including U.S. wines and spirits.

More details on Thailand eliminated tariffs and reduced excise taxes on wine: Thailand Eliminates Tariffs and Reduces Excise Taxes for Wine

Section V. Agricultural and Food Imports

Thailand's expanding consumer market, foodservice sector, and food processing industry continue to support demand for imported agricultural and food products. Among consumer-oriented products, U.S. tree nuts were one of the fastest-growing categories, increasing from $32 million in 2021 to $86 million in 2025, driven by demand for healthy snacks, bakery products, and food ingredients. Food preparations imports from United States also grew significantly, reaching $99 million in 2025, reflecting rising demand from food manufacturers, restaurants, and convenience food producers. Pet food imports continued to expand, supported by growing pet ownership and premiumization trends.

Demand for fresh fruit, dairy products, wine, and other premium food and beverage products remains strong, supported by tourism growth, expanding modern retail channels, and increasing consumer interest in high-quality imported products. Thailand's foodservice sector, valued at over $30 billion, continues to create opportunities for imported ingredients and consumer-oriented products.

As a major regional food processing hub, Thailand also imports substantial volumes of U.S. soybeans, cotton, distillers' grains, feed ingredients, and other food processing inputs to support its export-oriented manufacturing sector. The fastest-growing import categories were identified based on import value growth during 2021–2025 and recent import trends, reflecting long-term drivers such as urbanization, rising incomes, premiumization, and Thailand's role as a regional food processing and distribution center.

Table 4. Thailand: 2025 Imports of Consumer-Oriented Products and Competition

Product Category	2025 Thailand Total Food Import Value ($ million)	1st Supplier (Market Share)	2nd Supplier (Market Share)	U.S. Ranking (Market Share)
Dairy Products	$1,325	New Zealand (42 percent)	Australia (11 percent)	3 (7 percent)
Processed Vegetable	$1,079	Laos (42 percent)	China (21 percent)	6 (2 percent)
Soups and Other Food Preparations	$1,030	Singapore (28 percent)	United States (14 percent)	2 (14 percent)
Fresh Fruit	$836	China (62 percent)	Australia (8 percent)	4 (4 percent)
Tree nuts	$481	Indonesia (39 percent)	Vietnam (22 percent)	3 (20 percent)
Chocolate & Cocoa Products	$449	Malaysia (41 percent)	Indonesia (11 percent)	5 (4 percent)
Beef & Beef Products	$343	Australia (82 percent)	Japan (9 percent)	4 (1 percent)
Distilled Spirits	$193	U.K. (41 percent)	France (15 percent)	4 (4 percent)
Wine & Related Products	$144	France (35 percent)	Australia (22 percent)	4 (9 percent)

Source: Trade Data Monitor

Best High-value, Consumer-Oriented Product Prospects Categories: Key growth opportunities for U.S. exporters include soups and food preparations, dairy products, tree nuts, fresh fruits, beef and beef products, chocolate and cocoa products, processed vegetables, non-alcoholic beverages, processed fruit products, pet food, wine and distilled spirits, and health and functional food and beverage products.

Section VI. Key Contacts & 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, 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 Export Certificate Report Annual 2026. 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:

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