

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Thailand

## Exporter Guide

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**Report Highlights:**

This guide serves as a resource for U.S. companies seeking to do business in Thailand and provides market overviews, practical tips and information on local business practices, consumer preferences and trends. This report also identifies opportunities and entry approaches for the three major market sectors (food retail, food service, and food processing).

**Post:**

Bangkok

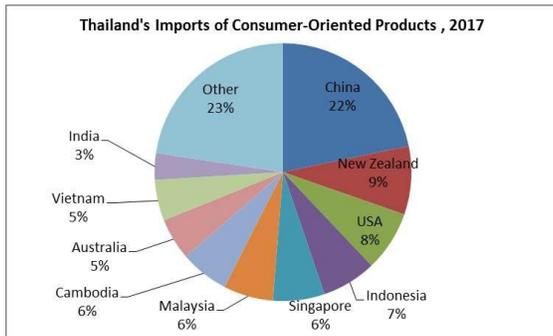
# Market Fact Sheet: Thailand

## Executive Summary:

Thailand is Southeast Asia’s second largest economy with a Gross Domestic Product (GDP) of U.S. \$506 billion. Thailand remains a strong agricultural competitor as it is the world’s leading exporter of natural rubber, frozen shrimp, canned tuna, canned pineapples, cooked poultry, and cassava. It is also a major exporter of sugar and rice. Thailand is the 13<sup>th</sup> largest export market for U.S. agricultural products while the U.S. is the largest supplier of agricultural products to Thailand, with 16 percent of total import market share.

## Imports of Consumer-Oriented Products

In 2017, the United States was the 3<sup>rd</sup> largest supplier of consumer-oriented products to Thailand with exports valued at U.S. \$385 million.



## Food Retail Industry:

In 2017, total food and beverage retail sales was U.S. \$54.2 billion, an increase of 6.7 percent from 2016. The number of food retail outlets continues to grow and there are over 15,900 convenience store and 1,300 supermarket locations. Changes in Thai household structure has led to changes in how Thais eat with rising demand for convenient ready-to-eat meals, healthy food products, and food delivery.

## Food Service Industry:

Thailand’s highly competitive hotel, restaurant, and institutional food service (HRI) sector is comprised of approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. HRI establishments source about 30-35 percent of their food products through imports to be used for food preparation, ready-to-eat meals, and catering services for airlines and cruise lines.

## Food Processing Industry:

Thailand’s food processing industry has developed rapidly and is one of the most developed in South East Asia with more than 10,000 food and beverage processing factories. In 2017, Thailand’s food ingredient imports exceeded U.S. \$2.5 billion, a 16 percent increase from the previous year. With rising demand for processed foods, Thai food processors must import large quantities of food ingredients that are not locally available.

## Quick Facts CY 2017

Imports of Consumer-Oriented Products: U.S. \$5.08 billion

Imports of U.S. Fish Products: U.S. \$229 million

### Top 10 Growth Consumer Oriented Products:

- Dairy Products
- Seafood Products
- Fresh Berries
- Tree Nuts
- Soups and Broths
- Fresh Vegetables
- Food Preparation
- Bread, Pastry, Cakes
- Wine and Beer
- Chilled/Frozen Beef

### Food Industry by Channel:

Total Agricultural Exports: U.S. \$42.58 billion

Total Agricultural Imports: U.S. \$15.85 billion

Food and Beverage Retail Sales: U.S. \$54.2 billion

Full-Service Restaurant Sales: U.S. \$5.2 billion

### GDP/Population:

Population: 69.15 Million

GDP (2017): U.S. \$455.4 Billion

GDP per capita: U.S. \$6,589

## Top Host Country Retailers:

**Supermarkets**

**Hypermarkets**

**Cash and Carry**

**makro**

**Convenience Stores**

## Section I. Market Overview

Thailand is Southeast Asia's second largest economy with a Gross Domestic Product (GDP) of U.S. \$506 billion. Exports account for more than 52 percent of GDP. Thailand remains a strong agricultural competitor, as it is the world's leading exporter of natural rubber, frozen shrimp, canned tuna, canned pineapples, cooked poultry, and cassava. It is also a major exporter of sugar and rice. According to the National Economic and Social Development Board (NESDB), Thailand's economy is forecast to grow between 3.5-4.5 percent in 2019 as compared to 4.2 percent growth in 2018. The economy is expected to improve in 2019 due to increased government spending particularly on infrastructure projects, global economic expansion, and improvement in private investments. In addition, the continual expansion of the tourism sector will continue to fuel economic growth.

Thailand is the 13<sup>th</sup> largest export market for U.S. agricultural products. In 2017, U.S. consumer oriented agri-food exports to Thailand were valued at U.S. \$385 million while total U.S. agricultural imports of these products from Thailand were nearly U.S. \$1.6 billion.

<b>U.S.-Thailand Trade of Consumer Oriented Agricultural Products</b>					
(million; US\$ per year)	2013	2014	2015	2016	2017
U.S. Imports from Thailand	1,219	1,323	1,444	1,583	1,591
U.S. Exports to Thailand	655	393	386	388	385
<b>Trade Balance</b>	<b>-564</b>	<b>-930</b>	<b>-1057</b>	<b>-1195</b>	<b>-1206</b>

Source: Global Trade Atlas and USDA Foreign Agricultural Service - Bangkok, Thailand

<b>Change in Thai Food Import Mix from the U.S.</b>					
(million; US\$ per year; % of total)	2013	2014	2015	2016	2017
<b>Bulk &amp; Intermediate</b>	<b>1,077</b>	<b>1,343</b>	<b>1,486</b>	<b>1,331</b>	<b>1,439</b>
%	52%	67%	72%	70%	70%
<b>Consumer Oriented</b>	<b>655</b>	<b>393</b>	<b>386</b>	<b>388</b>	<b>385</b>
%	32%	20%	19%	20%	19%
<b>Edible Fishery</b>	<b>325</b>	<b>257</b>	<b>197</b>	<b>193</b>	<b>229</b>
%	16%	13%	10%	10%	11%
<b>Total</b>	<b>2,057</b>	<b>1,993</b>	<b>2,069</b>	<b>1,911</b>	<b>2,053</b>

Source: Global Trade Atlas and USDA Foreign Agricultural Service - Bangkok, Thailand

Thailand currently has preferential trade arrangements with the Association of Southeast Asian Nation countries (ASEAN), Australia-New Zealand, China, India, Japan, Peru, South Korea, and Chile. These agreements have created additional challenges for U.S. agricultural exports, particularly due to large tariff differentials.

### A list of Thailand's free trade agreements

Country	Trade Agreement Effective Date
Thailand-Australia	January 1, 2005

Thailand-New Zealand	July 1, 2005
Thailand-Japan	November 1, 2007
Thailand-India	September 1, 2004
Thailand-Peru	December 31, 2011
Thailand-Chile	November 5, 2015
ASEAN-China	October 1, 2003
ASEAN-Korea	January 1, 2010
ASEAN-Australia-New Zealand	March 12, 2010
ASEAN-India	January 1, 2010
ASEAN-Japan	June 1, 2009
ASEAN Free Trade Area (AFTA)	January 1, 2002 – 5 percent January 1, 2010 – 0 percent
ASEAN-Hong Kong	January 1, 2019

Duties on imported U.S. consumer-ready food products range between 30-60 percent. Tariffs on meats, fresh fruits and vegetables, and processed foods are equally high, even for items with little or no domestic production. For example, frozen potatoes are not produced in Thailand but face a tariff of 30 percent. The tariff on apples stands at 10 percent, while pears and cherries tariffs are 30 and 40 percent respectively.

<b>Advantages</b>	<b>Challenges</b>
About 38 million middle-to-upper income consumers are eager to purchase imported food products.	U.S. products are not always price-competitive due to high tariffs and shipping costs.
Thais in urban areas (54 percent of the population) increasingly spend more on imported food items and have become relatively brand conscious and are changing their eating habits to accept more western style foods.	Free trade agreements with China, Australia, New Zealand, Chile, Japan, Korea, Peru, and India have made U.S. products less competitive especially for high value consumer products such as meats, processed meat, wine, spirits, cherries, peaches, plums, pears, frozen potatoes, and cheeses.
A dynamic and eager younger population (between ages of 15 and 35, representing 29 percent of the total population) is willing to try new products and is receptive to trends that fit their westernized lifestyles.	Local production is increasingly substituting for imported food items. Locally produced snack foods, salad dressings, sauces, jams and other processed foods are relatively inexpensive.
Increasing purchasing power of consumers in rural areas translates into more discretionary spending on non-traditional agricultural products.	Market penetration for imported products is mostly concentrated in Bangkok and major tourist-destination areas.
The Thai food processing industry is looking for new ingredients and shows a strong interest in importing health and functional food ingredients.	Imports of some U.S. food products are currently subject to restrictive trade barriers, including high import tariffs, rigid food import procedures, and burdensome documentation requirements.
Growing number of retail outlets.	The oligopolistic nature of hypermarkets exerts some

	control over prices, while convenience stores prefer low priced locally or regionally sourced products.
Middle income women give greater attention to health and beauty and are demanding new products from retailers.	Strong government protection on local agricultural products such as poultry and livestock products make it difficult for imported products to enter the market.
Growth in the tourism industry and an increase in the number of hotels leads to greater demand for imported food products.	Regional tourists sometimes seek cheaper local food alternatives or food products sourced from their respective countries.
Well-developed food service industry.	

## Section II. Exporter Business Tips

- It is essential to visit the market to conduct market research, especially for product testing, price comparisons, gauging competitors, consumer preferences, etc;
- U.S. exporters should identify the best distribution channel (e.g. local importers, distributors, supermarkets, retailers, etc.) and establish a good relationship with their representatives as they are very useful in facilitating and promoting exports of U.S. consumer-ready foods to Thailand;
- U.S. exporters should work with a representative or agent who have or can get strong local connections with target customers (retailers, hotels, restaurants, and food processors) and good understanding of Thai food and agriculture regulations and food import procedures;
- Networking with government officials and/or correct authorities can be the key to doing business successfully in Thailand;
- Localize your products: adjust the product to local tastes, verify consumer preferences, and set a competitive price;
- Trade fair participation is another way to raise awareness of your product;
- Successful U.S. exporters must provide reliable product availability, consistent quality, technical support, and respond to inquiries within 24 hours;
- When introducing new products, several factors should be kept in mind. Middle to upper income Thai consumers have an aversion to low quality products and are attracted to branded products. They also tend to be image conscious. Existing brand loyalties are most likely to be replaced by new products that focus on good quality, better packaging, availability, promotions, and competitive prices;
- Be patient and think long term. It is not unusual to visit the market 2-3 times before details are finalized;
- U.S. exporters can request a list of importers from FAS post at [agbangkok@fas.usda.gov](mailto:agbangkok@fas.usda.gov)

## Section III. Import Food Standards & Regulations/Import Procedure

Study the most recent Food and Agricultural Import Regulations and Standards report for Thailand. This document contains information on food laws, labeling requirements, food additive regulations, pesticide and other contaminants, import procedures, and other key regulations, requirements and specific standards. The report is available on the internet at <http://gain.fas.usda.gov>. The import tariffs for U.S. consumer-oriented products is available for the U.S. exporters at: <https://th.usembassy.gov/wp-content/uploads/sites/90/import-tariff-us-consumer-oriented-products-thailand.jpg>

Contact the Foreign Agricultural Service at the U.S. Embassy, Bangkok ([agbangkok@fas.usda.gov](mailto:agbangkok@fas.usda.gov)) with any questions on issues such as standards, tariffs, regulations, labeling or other concerns.

## Section IV. Market Sector Structure & Trends

Thailand's consumer market is relatively mature with high potential for future growth due to the country's economic growth, on-going urbanization, and growing middle class. Consumer disposable incomes also continue to rise. In 2017, Thai expenditures on food and beverages reached U.S. \$69 billion and per capita disposable income was U.S. \$3,447. The typical Thai diet consists of rice, meats, eggs, vegetables, fish, and seafood. In 2017, spending on food and non-alcoholic beverages accounted for 24 percent of household expenditures.

Consumer Expenditure on Food and Beverages 2013-2017										
(m; US\$) (%)	2013		2014		2015		2016		2017	
	Value	%								
<b>Food</b>	52,632	79.1%	51,398	79.2%	49,962	79.2%	50,557	79.9%	54,983	79.9%
Bread and Cereals	11,770	17.7%	11,593	17.9%	11,098	17.6%	10,968	17.3%	11,878	17.3%
Meat	6,321	9.5%	6,538	10.1%	6,265	9.9%	6,263	9.9%	6,874	10.0%
Fish and Seafood	6,595	9.9%	6,013	9.3%	5,844	9.3%	5,896	9.3%	6,364	9.3%
Milk, Cheese, and Eggs	4,617	6.9%	4,457	6.9%	4,111	6.5%	4,195	6.6%	4,573	6.6%
Oils and Fats	2,770	4.2%	2,811	4.3%	2,626	4.2%	2,374	3.8%	2,567	3.7%
Fruits	5,005	7.5%	4,891	7.5%	4,773	7.6%	4,852	7.7%	5,289	7.7%
Vegetables	12,128	18.2%	11,725	18.1%	11,950	19.0%	12,737	20.1%	13,876	20.2%
Sugar and Confectionery	1,664	2.5%	1,626	2.5%	1,569	2.5%	1,520	2.4%	1,652	2.4%
Other Food	1,763	2.6%	1,745	2.7%	1,726	2.7%	1,753	2.8%	1,910	2.8%
<b>Non-Alcoholic Beverages</b>	8,286	12.5%	8,019	12.4%	7,725	12.2%	7,564	12.0%	8,230	12.0%
Coffee, Tea, and Cocoa	1,466	2.2%	1,474	2.3%	1,415	2.2%	1,386	2.2%	1,513	2.2%
Mineral Waters, Soft Drinks, Fruit and Vegetable Juices	6,820	10.3%	6,544	10.1%	6,310	10.0%	6,179	9.8%	6,718	9.8%
<b>Alcoholic Beverages</b>	5,618	8.4%	5,497	8.5%	5,374	8.5%	5,143	8.1%	5,569	8.1%
Spirits	2,691	4.0%	2,628	4.0%	2,564	4.1%	2,446	3.9%	2,646	3.8%
Wine	242	0.4%	267	0.4%	269	0.4%	266	0.4%	297	0.4%
Beer	2,686	4.0%	2,602	4.0%	2,541	4.0%	2,431	3.8%	2,627	3.8%
<b>Total Expenditure on Food and Beverages</b>	<b>66,536</b>	<b>100.0%</b>	<b>64,914</b>	<b>100.0%</b>	<b>63,060</b>	<b>100.0%</b>	<b>63,265</b>	<b>100.0%</b>	<b>68,783</b>	<b>100.0%</b>

Source: Euromonitor and USDA Foreign Agricultural Service - Bangkok, Thailand

## Retail Sector

Thailand's food and beverage sector is one of the fastest growing sectors in the Thai economy. In 2017, total food and beverage retail sales was U.S. \$54.2 billion, an increase of 6.7 percent from 2016. The Thai Retail Association predicts that sales in the retail sector will grow by approximately 4 to 6 percent from 2018 to 2020. The number of food retail outlets continues to grow and there are already over 15,900 convenience store and 1,300 supermarket locations. Changes in Thai household structure has led to changes in how Thais eat with rising demand for convenient ready-to-eat meals, healthy food products, and food delivery. 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, and consumer preferences.

Intense competition in the retail food market, particularly from large-scale modern companies that use price strategies and loan extensions to low-income consumers, have led to the closure of many traditional stores. The convenience sector is not considered to be an attractive channel for U.S. products due to the pricing disadvantages as these stores mostly carry locally and regional produced goods. 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 as locally or regionally produced food products. In Thailand, food retailers have expanded into online shopping along with other online services. Despite the growth of online shopping, there is still a large percentage of lower income Thai consumers

who lack access to the internet and the computer skills to effectively use these platforms. In 2017, the total value of internet retail sales was U.S. \$1.9 billion, a 26 percent increase from 2016, and a 77 percent increase from 2013. Retailers such as Tops, Tesco Lotus, and Big C already operated their own on-line stores for consumers to catch the trend.

Further information on this market sector is available in [Thailand's Retail Food Sector Report](#).

### **HRI Food Service Sector**

Thailand's highly competitive hotel, restaurant, and institutional food service (HRI) sector is comprised of approximately 150,000 outlets including some 100,000 restaurants and more than 5,000 hotels and resorts. The industry has steadily increased in recent years driven by continuous growth in the country's tourism industry as well as changes in consumer behavior as modern urban families tend to eat out more regularly. Thailand imported U.S. \$385 million in consumer-oriented foods from the United States in 2017. HRI establishments are heavy users of imported products for food preparation, ready-to-eat meals, and catering services for airlines and cruise lines. In 2017, per capita consumer expenditures on hotels and catering totaled U.S. \$655 per person, an 11 percent increase from the previous year. On average, the entire HRI sector sources about 30-35 percent of their food products through imports. The United States has an approximately 20 percent share of this market. U.S. beef, seafood, cheese, frozen potatoes, seasonings, fresh fruits, dried fruits, nuts, bakery filling, fruit juices, juice concentrate, wine, and craft beer are well known by this sector.

As the Thai population ages and the middle-class grows so has consumer demand for healthy food and quality service causing restaurants to develop healthy food and beverage menu items and to use more premium ingredients. Technology has also influenced consumers' purchasing behaviors as they can easily access information through mobile phones or computers connected to the internet. Thai consumers, especially those between 20 and 40 years old, are increasingly embracing online shopping including online food delivery. The online food delivery service sector in Thailand is led by three market players: LineMan, Foodpanda, and Ubereats. According to Euromonitor, Thailand's market for online food ordering reached \$1 billion in 2018, more than doubling since 2014; faster than the approximately 80 percent growth in whole of the Asia-Pacific region.

Further information on this market sector is available in [Thailand's Food Service - Hotel Restaurant Institutional Sector Report](#).

### **Food Processing Sector**

Thailand's food processing industry has developed rapidly and is one of the most developed in South East Asia with more than 10,000 food and beverage processing factories. Most food processors are small-to-medium size and predominantly serve the domestic market. However, there are many medium-to-large food processors that produce higher-value products for domestic and export markets. Main products include frozen shrimp, sugar, poultry, canned tuna, confectionery, snacks, canned pineapple and tapioca. The main Thai processed food export markets are Japan, the United States and the EU. The Thai seafood sector is the third largest in the world, after China and Norway, with 90 percent of output being exported. The packaged food industry is highly fragmented, with the top ten companies controlling only about one-third of the sales value.

With rising demand for processed foods, Thai food processors must import large quantities of food ingredients that are not locally available. An aging society is another factor that food manufacturers should take into consideration when developing new products to be aligned with consumer needs. Urban dwellers, in particular, have less time for food preparation due to longer working hours and a greater presence of women in the work force. Thailand's food processing sector is heavily export-oriented with more than 50 percent of production sold outside the country. Because of this, Thai food manufacturers seek high-quality food ingredients at reasonable prices to meet the changing market demand. The United States is considered to be a world leader in food ingredient technology and one of the major food ingredient suppliers to the world. In this market, U.S. suppliers should focus their attention on new functional food ingredients, flavors, and other ingredients that promote the health and wellness benefits in foods.

In 2017, Thailand's food ingredient imports exceeded U.S. \$2.5 billion, a 16 percent increase from the previous year. The United States is the fourth largest supplier of these products. U.S. products with the highest growth were dairy ingredients, dried fruits, and nuts. The food ingredient market continues to grow due to increases in population, purchasing power, dual income families and new product development. Although domestic ingredients hold the greatest share of the market, these items tend to be low-value. High-value raw and semi-processed products such as grains, vegetable oils, starches, dairy ingredients, specialty bakery ingredients are generally not available locally and must be imported.

More information is available in [Thailand's Food Processing Sector Report](#).

## Section V. Agricultural and Food Imports

Agricultural and Food Imports 2015 - 2017

Thailand Imports (In Thousands of Dollars)	Imports from the World			Imports from the US			U.S. Market Share		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
<b>CONSUMER-ORIENTED AGRICULTURAL TOTAL</b>	4,394,451	4,619,170	5,076,899	386,291	387,674	384,898	8.79	8.39	7.58
Snack Foods	187,737	209,341	220,906	12,526	16,658	17,656	6.67	7.96	7.99
Breakfast Cereals & Pancake Mix	40,862	47,751	47,522	1,440	1,511	1,781	3.52	3.17	3.75
Beef and Beef Products	122,225	87,726	92,584	3,141	3,318	4,442	2.57	3.78	4.80
Poultry Meat	9,197	8,727	7,518	602	1,098	780	6.54	12.58	10.38
Dairy Products	747,327	602,696	748,549	54,557	39,209	47,766	7.30	6.51	6.38
Eggs & Products	23,458	22,088	22,002	850	311	322	3.62	1.41	1.46
Fresh Fruits	621,274	681,588	604,988	37,558	33,149	33,040	6.05	4.86	5.46
Fresh Vegetables	203,475	221,278	250,475	3,410	1,244	1,892	1.68	0.56	0.76
Processed Fruit	131,033	150,937	155,273	17,093	19,264	17,734	13.04	12.76	11.42
Processed Vegetables	463,958	583,848	666,789	24,202	24,916	22,168	5.22	4.27	3.32
Fruit & Vegetable Juices	63,742	74,272	68,781	8,702	9,021	8,100	13.65	12.15	11.78
Tree Nuts	180,016	202,045	304,065	28,572	34,723	20,703	15.87	17.19	6.81
Wine & Beer	76,976	79,235	84,615	4,901	3,725	3,990	6.37	4.70	4.72
Nursery Products & Cut Flowers	20,984	30,507	32,296	39	57	89	0.19	0.19	0.27
Pet Foods (Dog & Cat Food)	60,400	53,715	59,401	11,228	9,440	10,474	18.59	17.57	17.63
Other Consumer-Oriented Products	1,441,785	1,563,418	1,711,137	177,472	190,031	193,961	12.31	12.15	11.34
<b>FISH &amp; SEAFOOD PRODUCTS</b>	2,474,182	2,966,385	3,452,739	197,433	192,731	228,990	7.98	6.50	6.63
<b>AGRICULTURAL PRODUCTS TOTAL</b>	11,253,970	11,189,914	11,733,770	1,871,848	1,718,418	1,823,809	16.63	15.36	15.54
<b>AGRICULTURAL &amp; RELATED TOTAL</b>	14,543,668	14,937,718	15,847,472	2,106,833	1,946,116	2,083,946	14.49	13.03	13.15

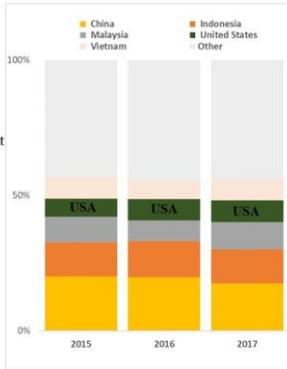
Source: Global Trade Atlas and USDA Bangkok, Thailand

### Snack Foods



Value: U.S. \$17.7 million  
Market Share: 8.0 percent  
Change from 2017: + 6.0 percent

- Major suppliers:
- China 17.5 percent
  - Indonesia 12.5 percent
  - Malaysia 10.2 percent

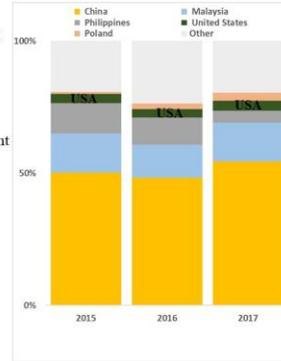


### Breakfast & Pancake Mix



Value: U.S. \$1.8 million  
Market Share: 3.8 percent  
Change from 2017: + 17.8 percent

- Major suppliers:
- China 54.5 percent
  - Malaysia 14.5 percent
  - Philippines 4.6 percent

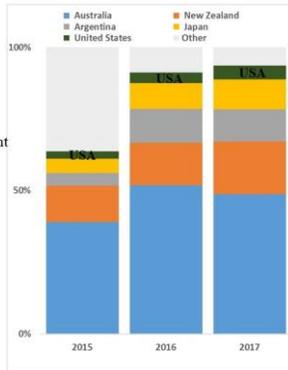


### Beef and Beef Products



Value: U.S. \$4.4 million  
Market Share: 4.8 percent  
Change from 2017: + 33.9 percent

- Major suppliers:
- Australia 48.8 percent
  - New Zealand 18.4 percent
  - Argentina 11.2 percent

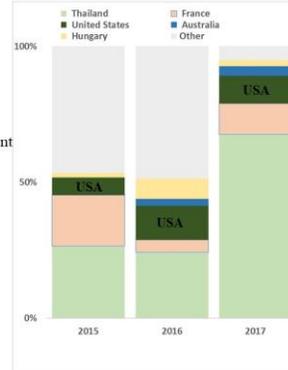


### Poultry Meat



Value: U.S. \$0.8 million  
Market Share: 10.4 percent  
Change from 2017: - 28.9 percent

- Major suppliers:
- Thailand 67.6 percent
  - France 11.3 percent
  - USA 10.4 percent

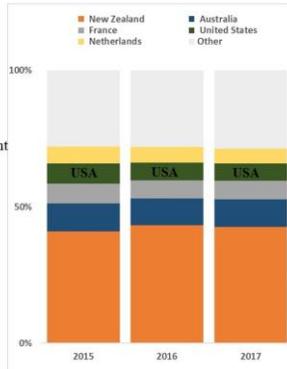


### Dairy Products



Value: U.S. \$47.8 million  
Market Share: 6.4 percent  
Change from 2017: +21.8 percent

- Major suppliers:
- New Zealand 42.6 percent
  - Australia 10.1 percent
  - France 6.7 percent

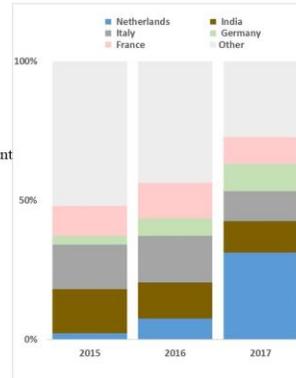


### Eggs & Products



Value: U.S. \$0.3 million  
Market Share: 1.5 percent  
Change from 2017: +3.6 percent

- Major suppliers:
- Netherlands 31.3 percent
  - India 11.2 percent
  - Italy 10.7 percent

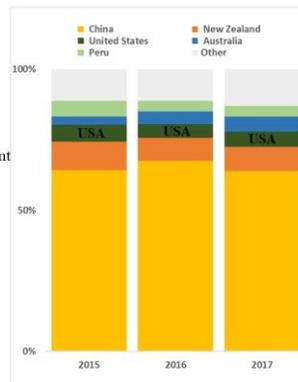


### Fresh Fruits



Value: U.S. \$33.0 million  
Market Share: 5.5 percent  
Change from 2017: -0.33 percent

- Major suppliers:
- China 64.0 percent
  - New Zealand 8.5 percent
  - USA 5.5 percent

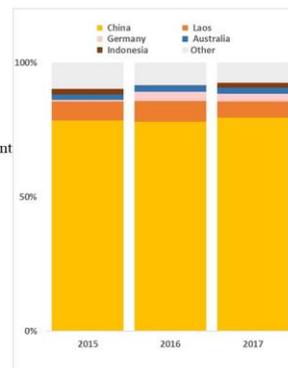


### Fresh Vegetables



Value: U.S. \$1.9 million  
Market Share: 0.8 percent  
Change from 2017: +52.1 percent

- Major suppliers:
- China 79.5 percent
  - Laos 6.1 percent
  - Germany 2.9 percent

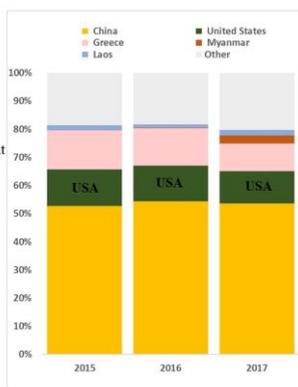


### Processed Fruit



Value: U.S. \$17.7 million  
Market Share: 11.4 percent  
Change from 2017: -7.9 percent

Major suppliers:  
- China 53.6 percent  
- USA 11.4 percent  
- Greece 9.9 percent

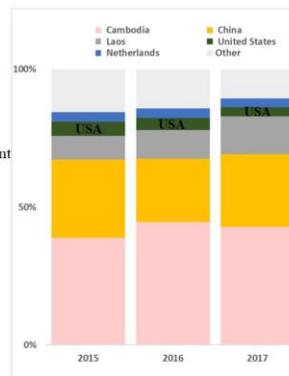


### Processed Vegetables



Value: U.S. \$22.2 million  
Market Share: 3.3 percent  
Change from 2017: -11.0 percent

Major suppliers:  
- Cambodia 42.8 percent  
- China 26.4 percent  
- Laos 13.7 percent

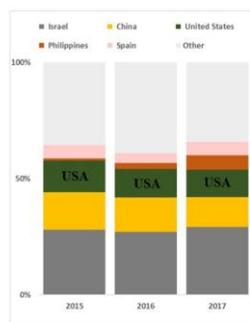


### Fruit & Vegetable Juices



Value: U.S. \$8.1 million  
Market Share: 11.8 percent  
Change from 2017: -10.2 percent

Major suppliers:  
- Israel 29.2 percent  
- China 12.9 percent  
- USA 11.8 percent

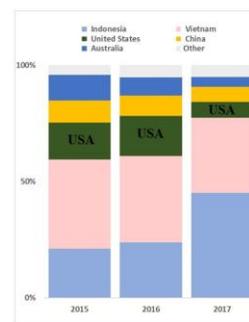


### Tree Nuts



Value: U.S. \$20.7 million  
Market Share: 6.8 percent  
Change from 2017: -40.4 percent

Major suppliers:  
- Indonesia 45.1 percent  
- Vietnam 32.3 percent  
- USA 6.8 percent

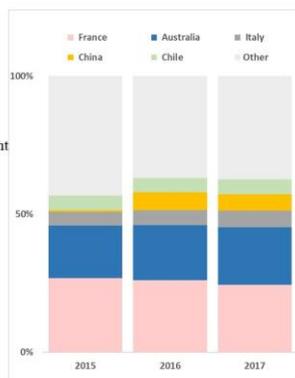


### Wine and Beer



Value: U.S. \$4.0 million  
Market Share: 4.7 percent  
Change from 2017: +7.1 percent

Major suppliers:  
- France 24.4 percent  
- Australia 20.8 percent  
- Italy 6.0 percent

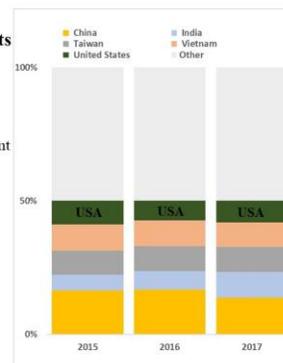


### Fish and Seafood Products



Value: U.S. \$229.0 million  
Market Share: 6.6 percent  
Change from 2017: +18.8 percent

Major suppliers:  
- China 11.2 percent  
- India 7.8 percent  
- Taiwan 7.6 percent



## Section VI. Key Contacts & Further Information

The Foreign Agricultural Service in Bangkok maintains up-to-date information covering food and agricultural import opportunities in Thailand and would be pleased to assist in facilitating U.S. exports and entry to the Thai market. Questions or comments regarding this report should be directed to the Foreign Agricultural Service in Bangkok at the following local or U.S. mailing address:

Local:

Office of Agricultural Affairs  
U.S. Embassy

U.S. Mail:

Office of Agricultural Affairs  
U.S. Embassy, Box 41

120-122, Wireless Road  
Bangkok 10330  
Tel. +662-205-5106  
Fax. +662-255-2907  
Email: Agbangkok@fas.usda.gov  
Web site: www.fas.usda.gov

APO AP 96546

**End of Report.**