



# *Food Industry in Thailand*

## *“Kitchen of the world”*

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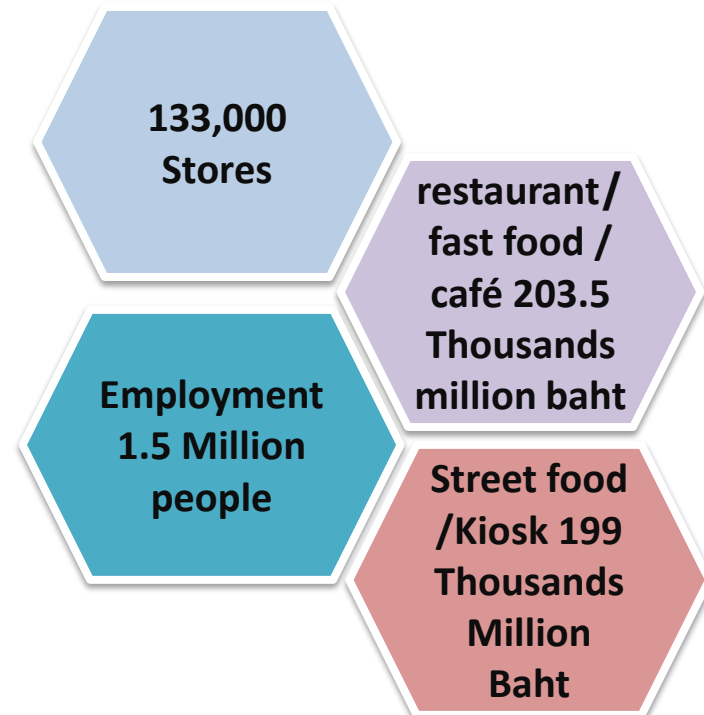


# Food and Beverage Business in Thailand

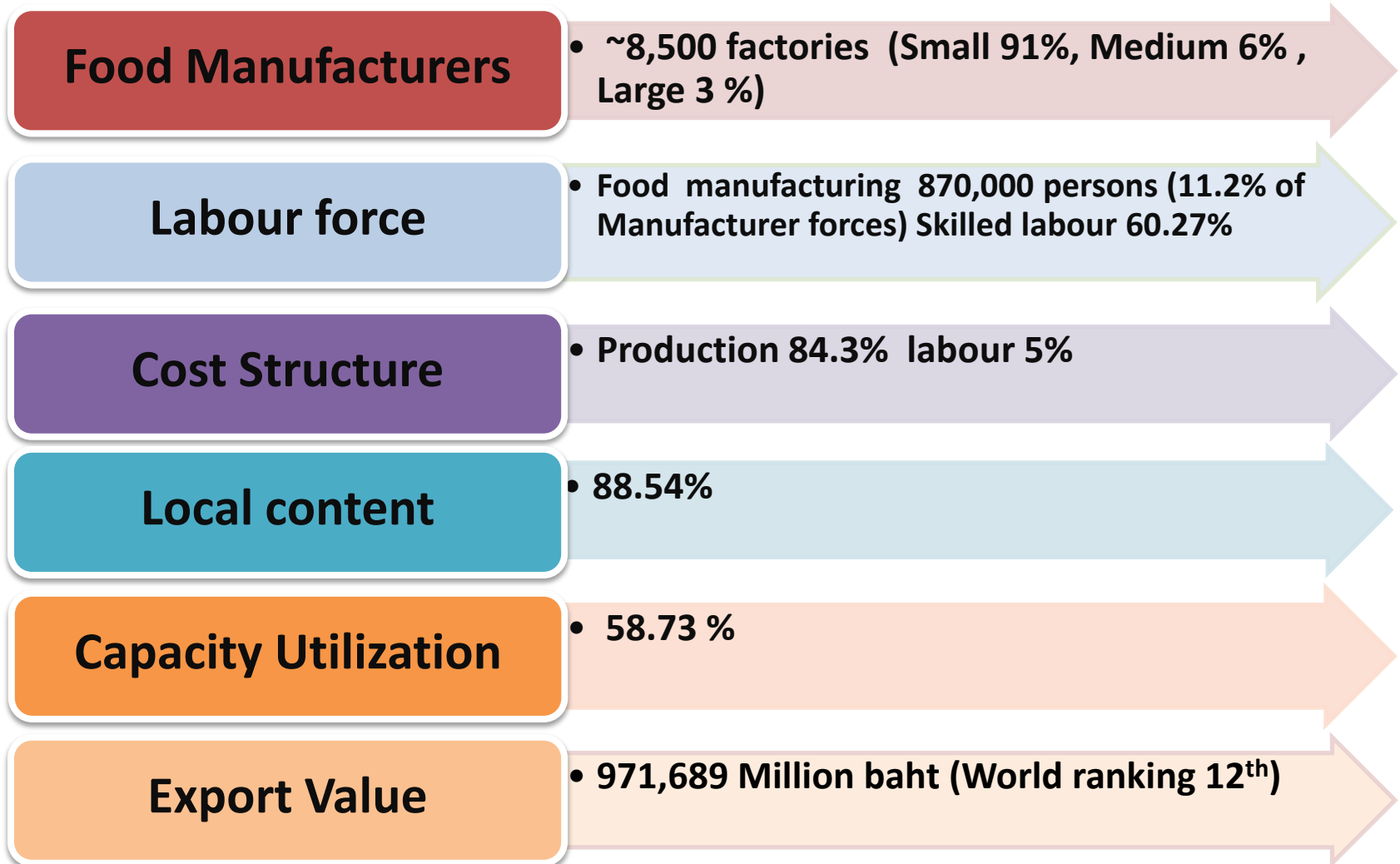
## Processing Industry



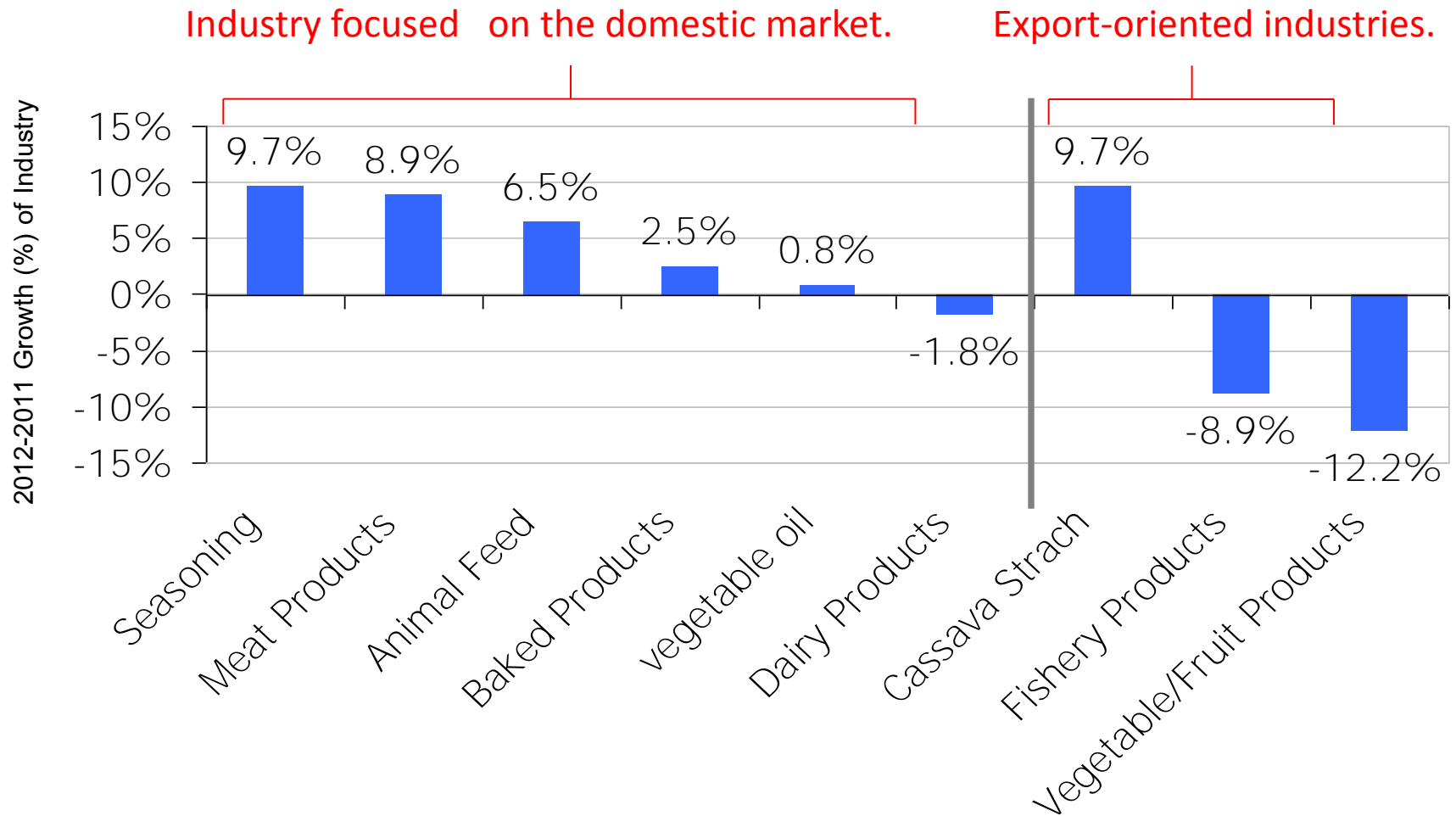
## Food Business



# The food processing industry's structure



# Thailand's food production



# Global food trade value

	2007	2008	2009	2010	2011	2012*
Global food trade (M\$US)	772,444	934,678	825,114	929,073	1,125,471	1,130,216
Growth (%)		21.00	-11.72	12.60	21.14	0.42

## Thailand's Food market share compared with the global food market share (overall)



\*2012, is the estimated value

2006    2007    2008    2009    2010    2011    2012

# 2012 THAILAND'S TOP FOOD EXPORT CATEGORIES AND WORLD'S RANKING



THAILAND ranked 12th in total food exports



World's # 1 Cassava Exports



World's # 2 Sugar Exports



World's # 3 Fishery Exports



World's # 3 Rice Exports



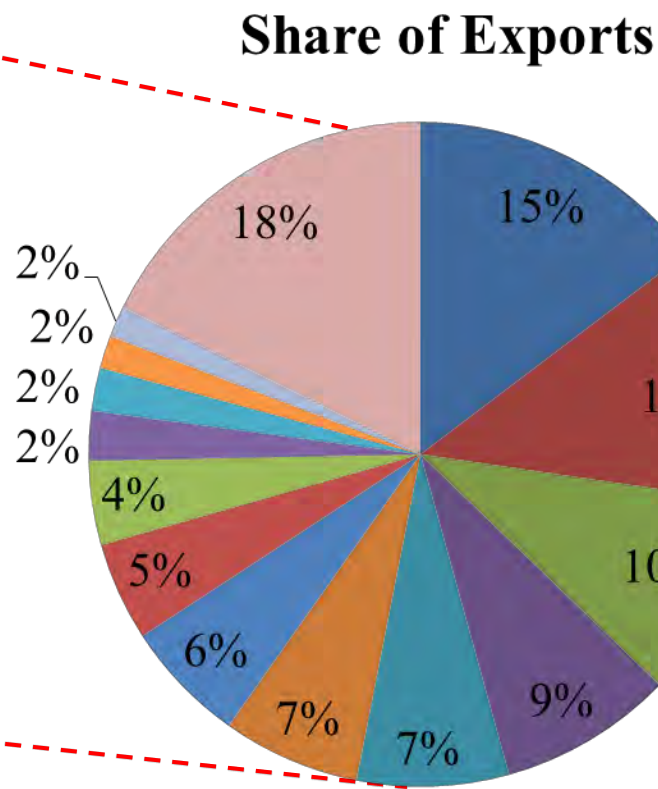
World's # 4 Chicken Exports



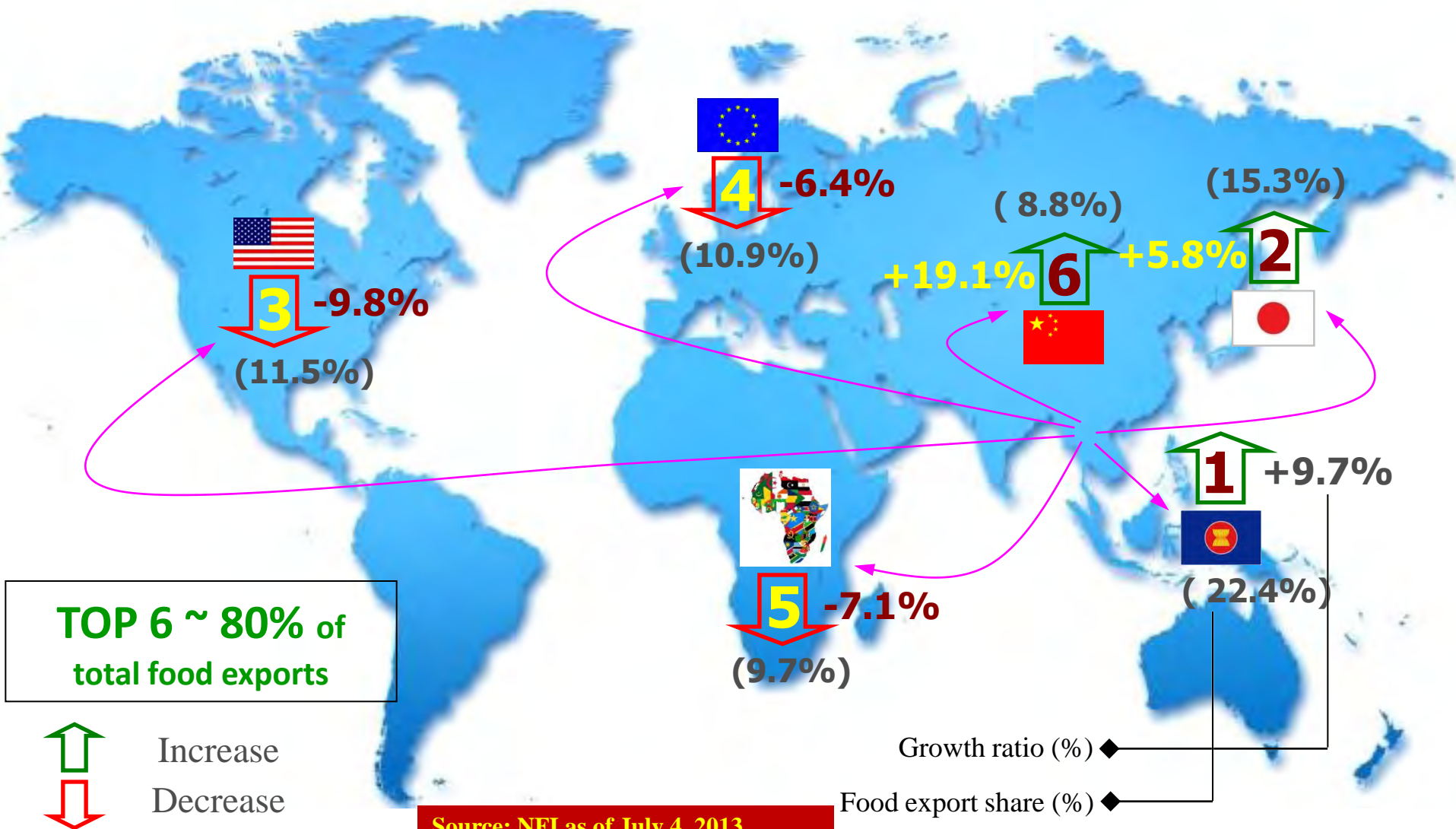
# 2012 Thailand's Top 5 Food Exports:

Rice (#1), Sugar (#2), Shrimp (#3),  
Canned Tuna (#4) and Chicken & Poultry (#5)

**2012  
Exports**  
  
**Bt 971,689  
Million.  
(+0.8%)**



In 2012, Thai food exports to ASEAN grew stronger than markets outside ASEAN.



Source: NFI as of July 4, 2013

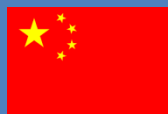


# Thai Food Exports to ASEAN and Region\* in 2012

Thailand into Asia's largest food trade and distribution center.

## ASEAN+6

### ASEAN+3



China



Japan



Korea

### 49%



## 52%



Australia



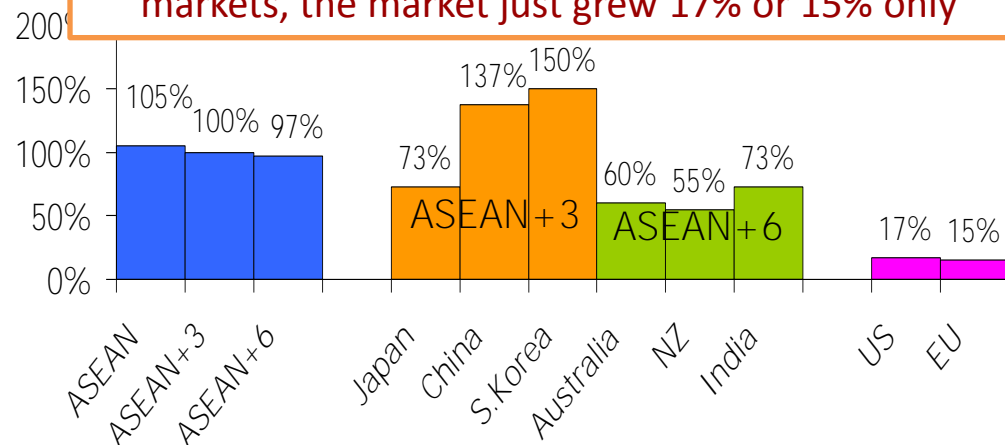
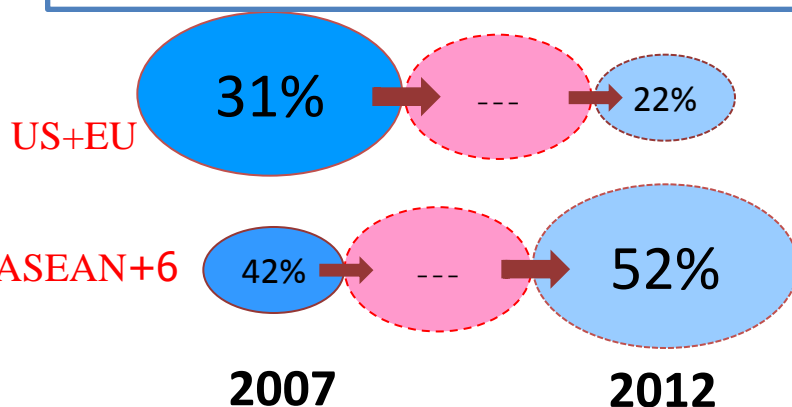
New Zealand



India

Thailand relied more on regional exports than U.S. and EU markets.

Over the past five years, Thai's food exports to countries in ASEAN and region\* possessed a strong growth (approx.100%), compared with US and EU markets, the market just grew 17% or 15% only

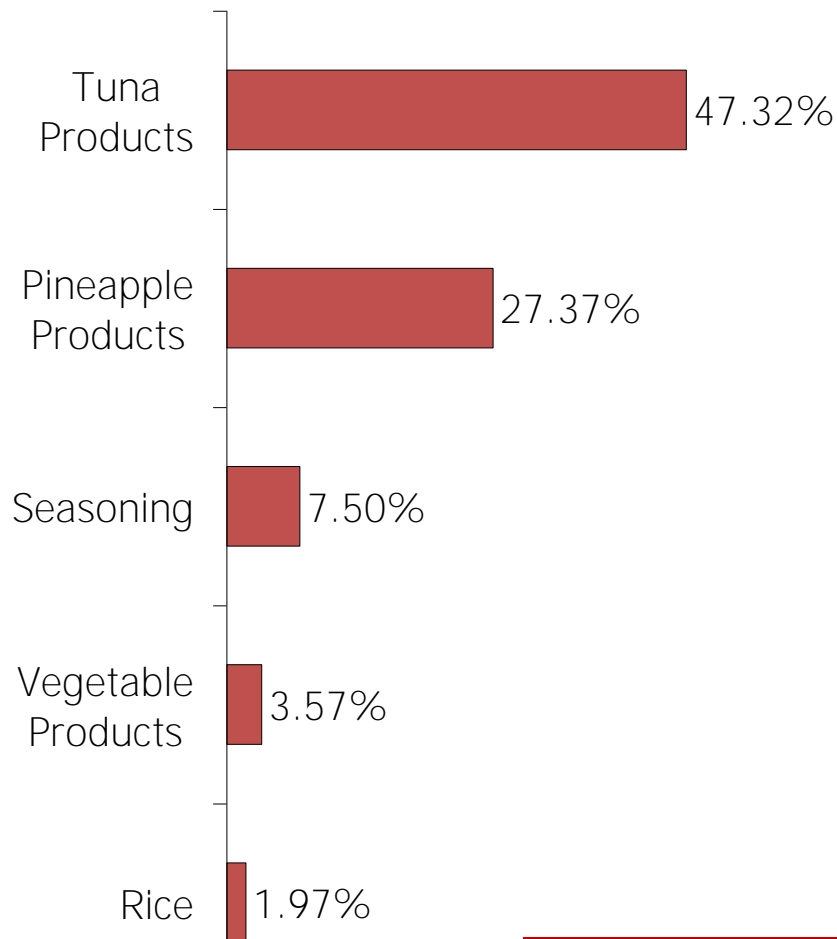


# In 2012, Food Trade between Thailand – Poland

## Thailand's **export** to Poland

950 million Baht.

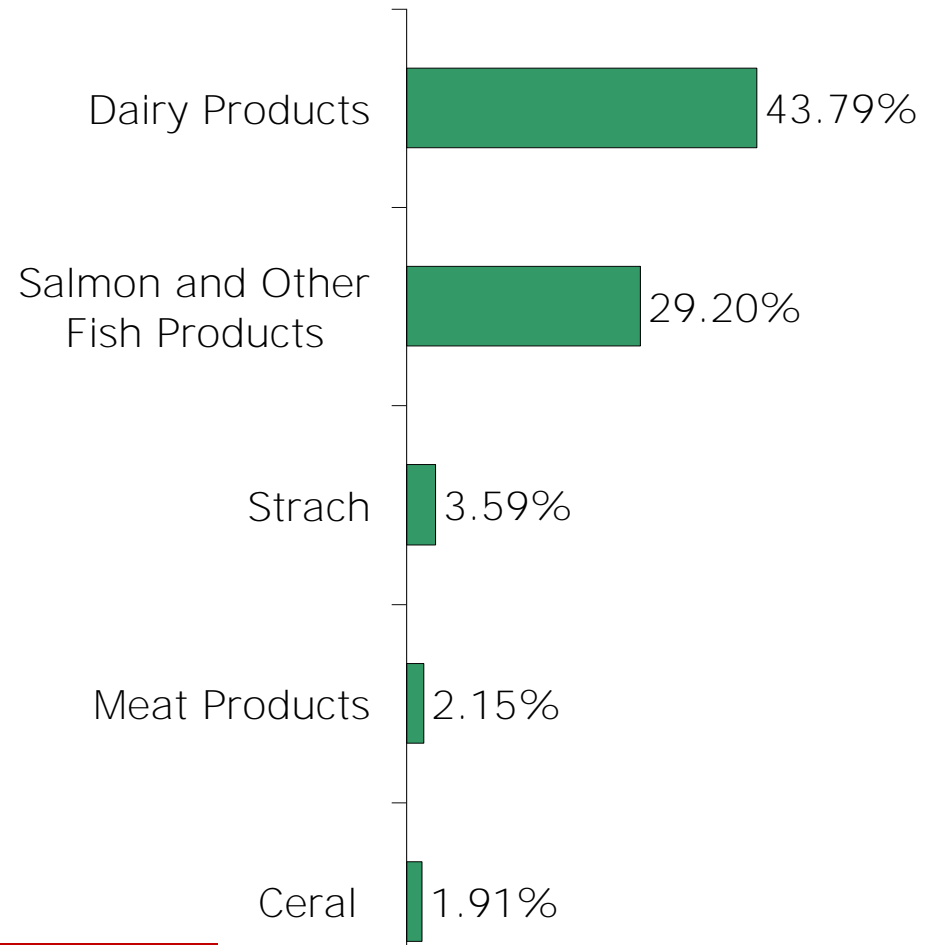
### Top Five



## Thailand's **import** from Poland

433 million Baht.

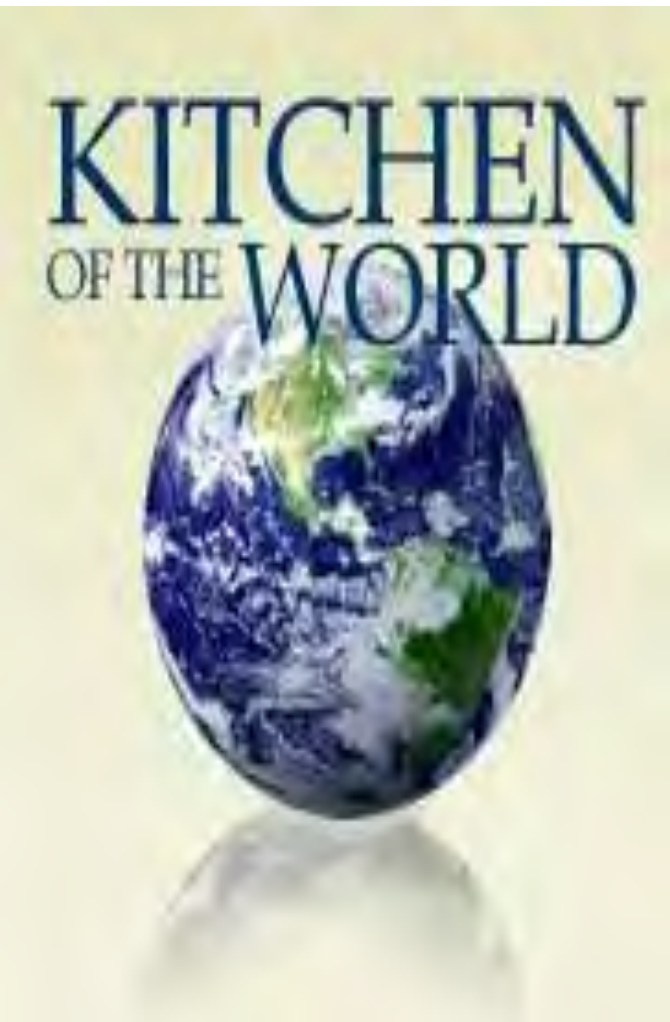
### Top Five



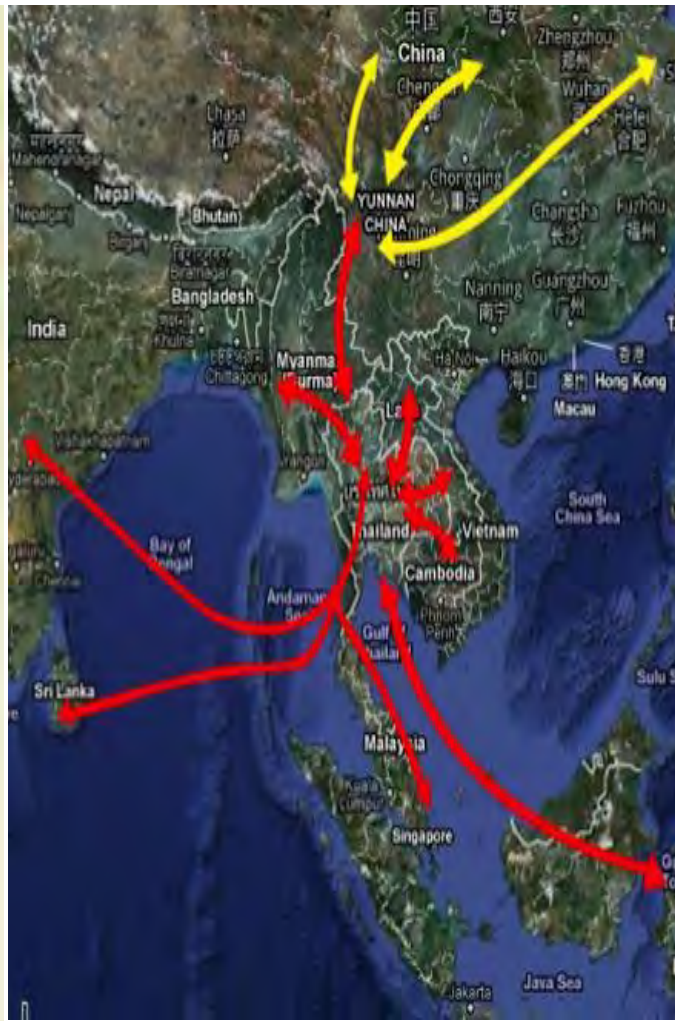
Source: NFI as of May 23, 2013

# Opportunities and challenges

**Thailand Food Quality  
to the World**



**Thailand hub  
of ASEAN**

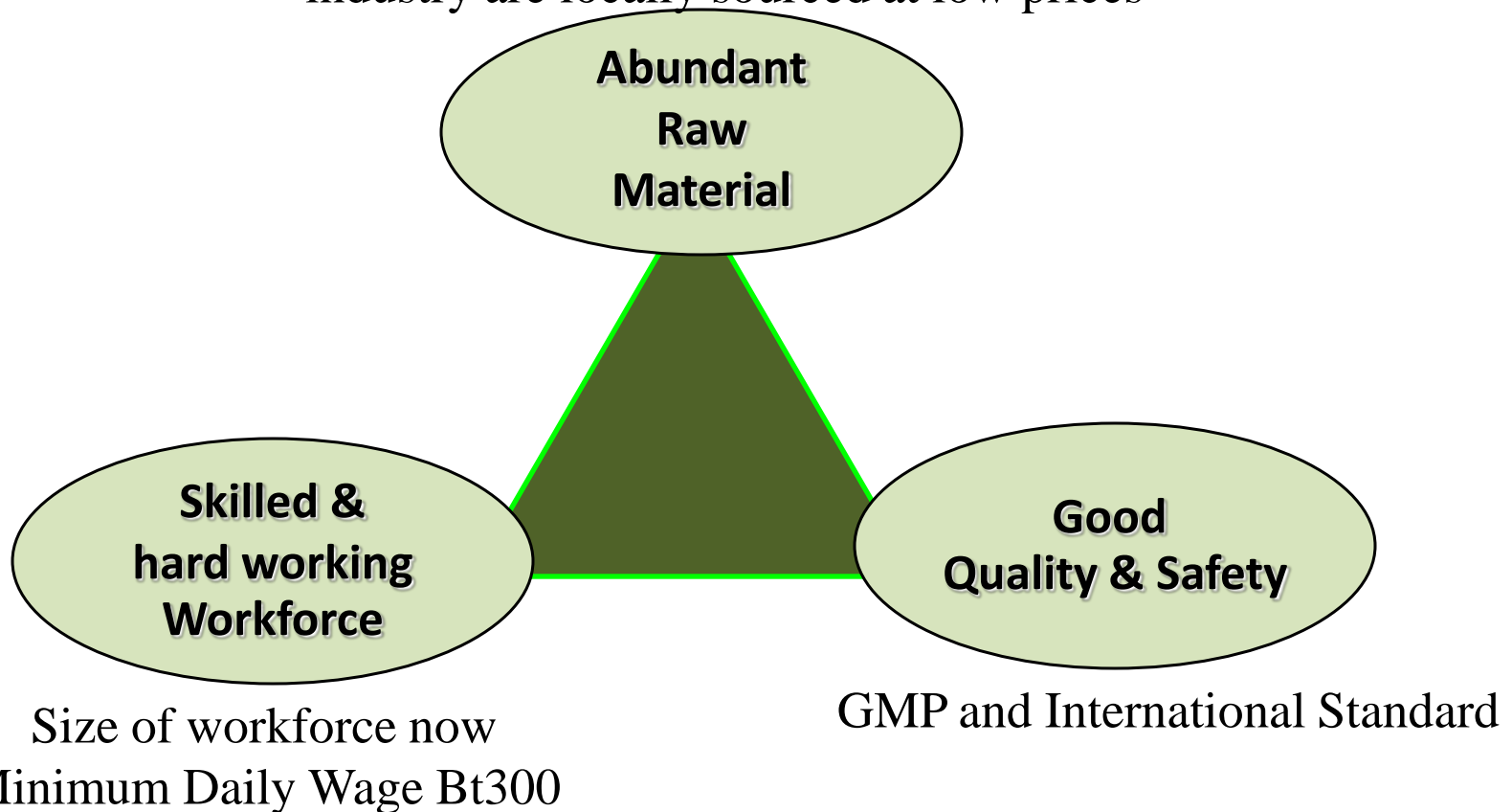


**Opportunities  
in Thailand**



# STRENGTHS OF THAI FOOD INDUSTRY

> 80% of raw materials used by the food industry are locally sourced at low prices



# Food Safety Standards

- **Thai food factories must apply for GMP, ISO, HACCP, TQM, Water footprint and Carbon footprint.**
- **For food exports, BRC , IFS, and SQF must be applied.**
- **Agricultural Commodity and Food Standards (ACFS)**
  - **Good Manufacturing Practice(GMP)**
  - **Good Hygienic Practice (GHP)**
  - **ISO 22000 (Safety on Food Supply Chain)**



# Thailand's Processed Food Industry

The **high demand** for processed foods domestically and overseas are attracting investment to Thailand's food and agribusiness, while the strong demand for manufacturing machinery and equipment continue to attract the world's major supplier.



Thailand was the **first** country in Southeast Asia to adopt **agriculture biotechnology**.



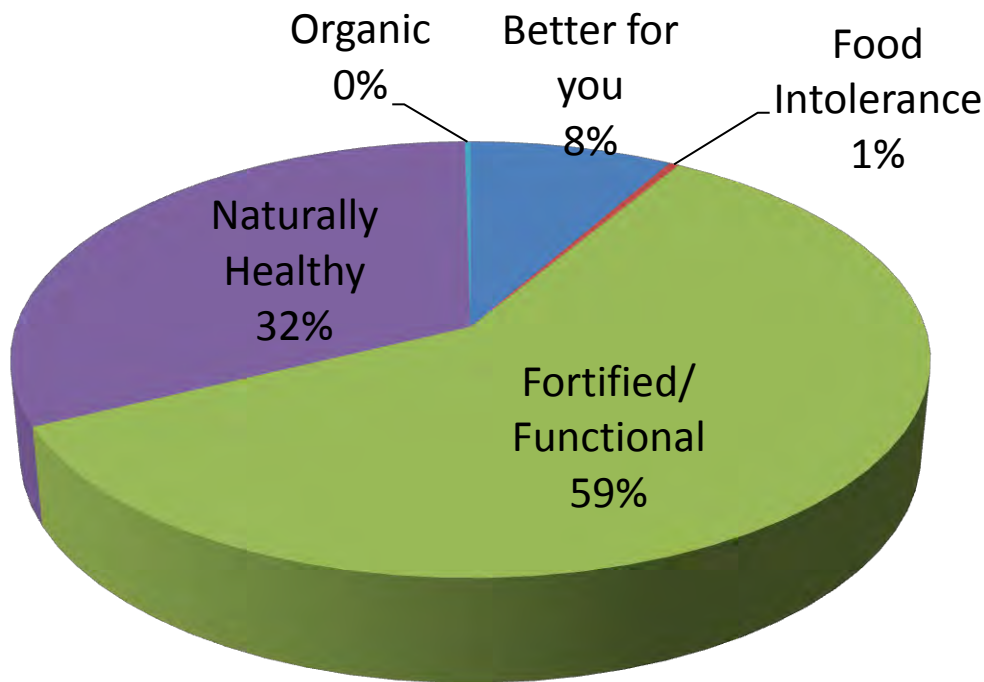
# Processed Food Situation : Domestic Market



- Demand of Processed food increase continuously.
- Strong Growth Due To Busier Consumer Lifestyles
- Market size of Processed food in Thailand is around 1.7 Million Million Baht (2012).

# Health Food Situation : Domestic Market

## “Fast expansion in the current Health Food Market”



- Demand of Health food increase continuously.
- Consumers Show Growing Interest in Health and Wellness
- Market size of Health food in Thailand is around 1,200 billion baht (2012).

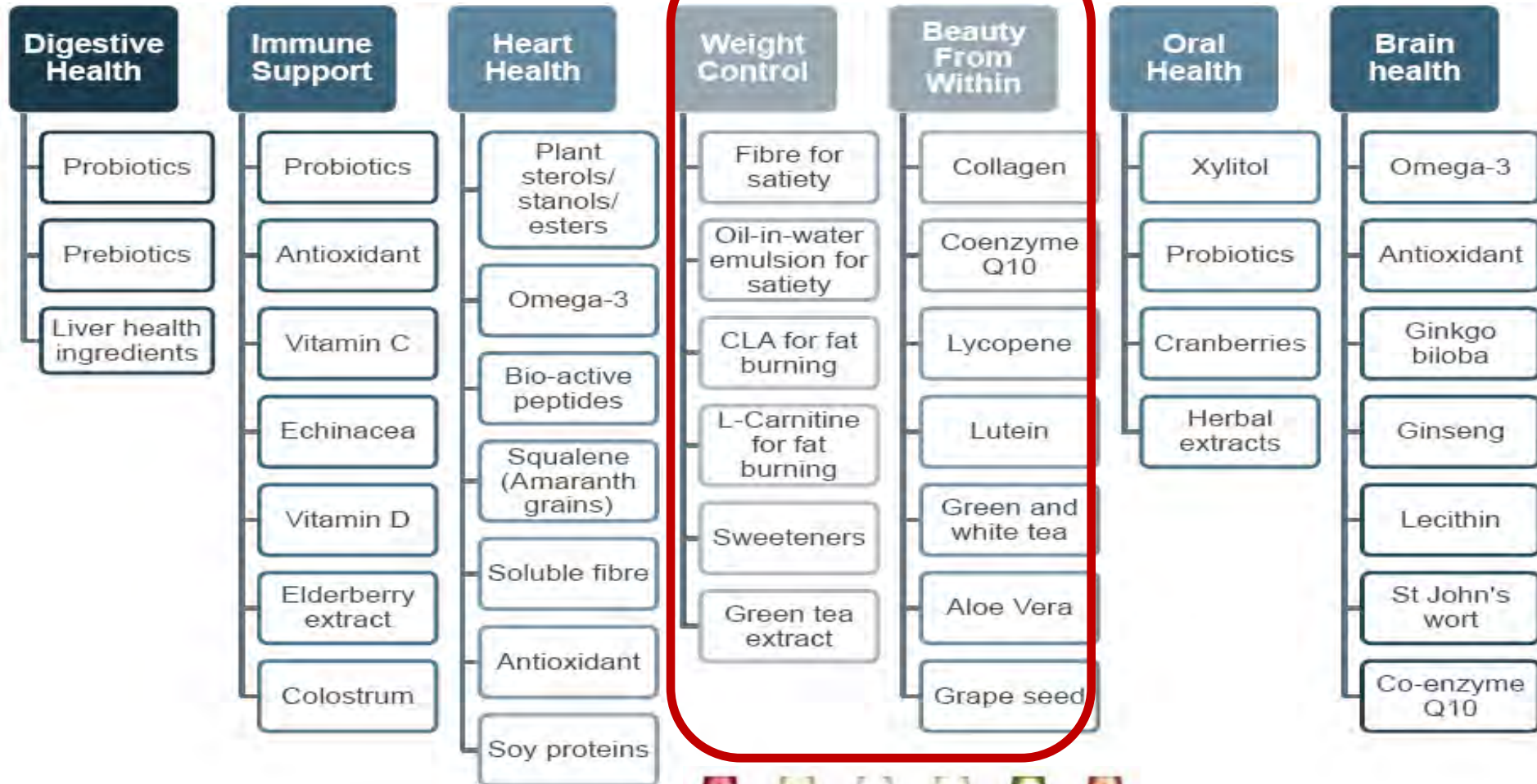
# Functional Food/Drink Situation

- Demand of Functional food and beverage increase continuously.
- Market size of Functional Food in Thailand is around 47,457.3 million baht (2012).
- Market size of Functional Drink in Thailand is around 32,388.3 million baht (2012).





# Popular Functional Drink Products in Thailand







# **Key Trends of Food Industry in Thailand**

**Future Market Growth Driven by Health Trends and Convenience.**

**Modern Trade Channels Continue Expansion**

**Industry Players Prepare for Advent of Asean Economic Community in 2015**

**Tendency for Obesity and Weight Gain in Thailand**







**For further information**

**Thai National Food Institute:**

**[www.nfi.or.th](http://www.nfi.or.th)**

# National Food Institute

Empowering Food Industry