THAILAND BOARD OF INVESTMENT

Thailand's Food Industry

Food Industry in Thailand

"Kitchen of the World"

An abundance of natural resources combined with significant investments in technology, food safety R&D and adhering to international quality standards have helped to dub Thailand as the "Kitchen of the World." As the largest sole net food exporter in Asia, Thailand is one of the world's largest producers of food products such as rice, canned tuna, frozen seafood, chicken and canned pineapple.

In 2011, the value of Thai food exports increased 20% from the previous year owing to strengthened economic performance amongst major food importers such as the US, Japan, and ASEAN countries.

Tha

Export Items
Total Food
Fisheries
Shrimp
Tuna
Other canned fish
Frozen fish
Cuttlefish
Others
Cereal
Rice
Others
Meat
Chicken (Prepared/Preserved)
Others
Fruit
Pineapple (Canned/Preserved)
Pineapple Juice
Mango
Others
Vegetable
Sweet Corn (Canned)
Baby corn (Fresh/Canned)
Others
Others Food
Sugar
Non-Alcoholic Beverage
Seasoning
Palm oil
Tapioca (Flour/starch)
Tapioca (Pellet/chip)
Feed
Pet food
Others

iland's Exported Food Products, 2008 – 2011

2008		2009		2010		2011	
Metric Ton	Million US$	Metric Ton	Million US$	Metric Ton	Million US$	Metric Ton	Million US$
29,035,481	25,935	28,767,703	25,140	28,368,985	26,755	33,247,743	32,150
1,672,737	7,139	1,652,205	7,004	1,729,549	7,321	1,734,829	8,168
358,928	2,807	398,894	3,114	427,581	3,365	392,616	3,676
506,097	2,152	534,878	1,915	588,727	1,981	594,751	2,357
193,761	555	182,770	560	190,681	560	205,036	644
408,117	781	343,833	670	325,476	643	303,853	651
81,778	449	78,400	400	73,638	413	67,269	447
124,056	396	113,430	344	123,447	359	171,303	393
10,376,414	6,830	8,677,883	5,757	8,983,099	5,625	11,121,224	6,717
10,218,286	6,775	8,638,842	5,741	8,939,630	5,606	10,706,229	6,537
158,128	54	39,042	16	43,469	19	414,995	180
858,584	2,119	782,067	2,016	636,067	2,073	545,194	2,371
400,057	1,922	388,931	1,798	427,610	1,853	441,343	2,061
458,527	198	393,136	217	208,457	219	103,851	310
2,016,352	2,014	2,148,655	2,044	2,055,885	2,117	2,163,149	2,296
650,783	683	539,297	554	550,018	552	641,185	669
152,793	183	151,396	217	139,877	220	146,771	227
36,333	48	45,343	53	42,987	50	59,691	56
1,176,443	1,100	1,412,619	1,218	1,323,003	1,295	1,315,501	1,343
491,487	550	451,410	548	465,634	544	559,543	654
172,872	173	170,179	182	182,821	182	184,178	190
48,615	52	44,523	49	45,587	49	46,092	51
270,000	325	236,708	316	237,227	313	329,274	413
13,619,908	7,283	15,055,482	7,773	14,498,751	9,075	18,858,632	20,112
5,011,802	1,588	5,052,570	2,053	4,500,969	2,311	6,520,480	3,648
425,723	240	355,476	307	400,444	409	551,900	541
177,128	328	195,097	388	222,151	432	237,502	482
498,115	551	185,823	157	222,000	218	482,599	532
1,286,513	511	1,817,735	566	1,764,107	836	1,918,374	963
2,851,433	524	4,357,028	682	4,273,225	866	3,731,027	985
695,028	289	796,044	274	988,775	417	878,463	409
268,687	651	242,483	609	275,040	658	305,038	715
2,405,478	2,601	2,053,227	2,738	1,852,040	2,927	4,233,249	11,837

Source: National Food Institute

Fishery products

In 2011, Thailand exported 1.7 million tons of fishery products valued at US$8.2 billion, a 12% increase from 2010. This growth is driven by rising demand in the U.S. and Japan.

Rice

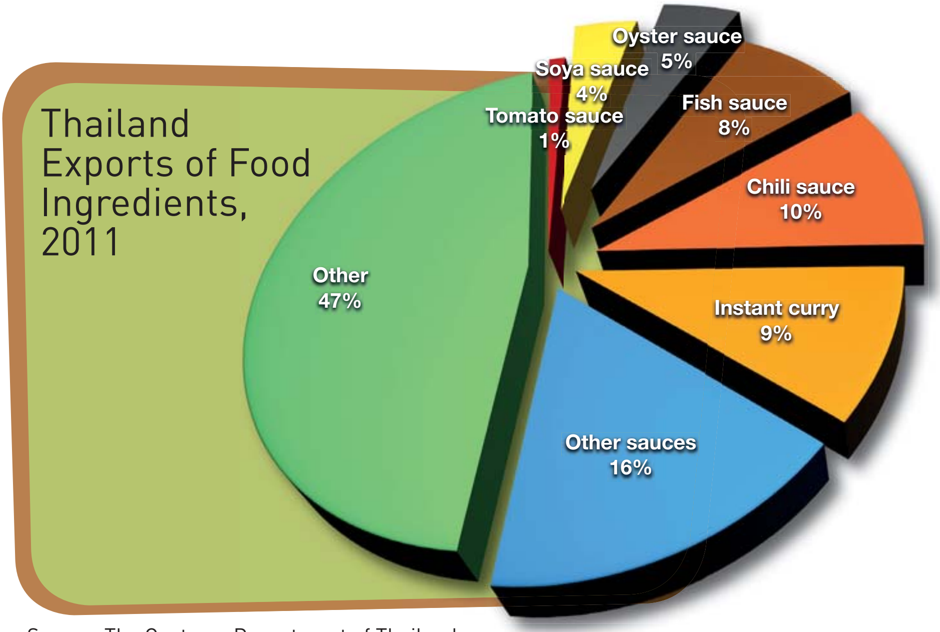
In 2011, the value of rice exports grew by 17% from 2010, owing to higher prices in the wake of natural disasters affecting global food supplies.

Livestock Products

In 2011, the value of meat exports increased by 14% from 2010. Following the 2011 tsunami and nuclear plant leaks, Japanese consumers significantly contributed to demand increases in poultry and meat products from unaffected countries such as Thailand.

Fruit and Vegetable Products

In 2011, the value of fruit and vegetable exports grew by 8% and 20% year-on-year respectively. Growth was focused in the processed fruits and vegetables industries and driven by demand growth from the US and EU.



Source: The Customs Department of Thailand

Sugar

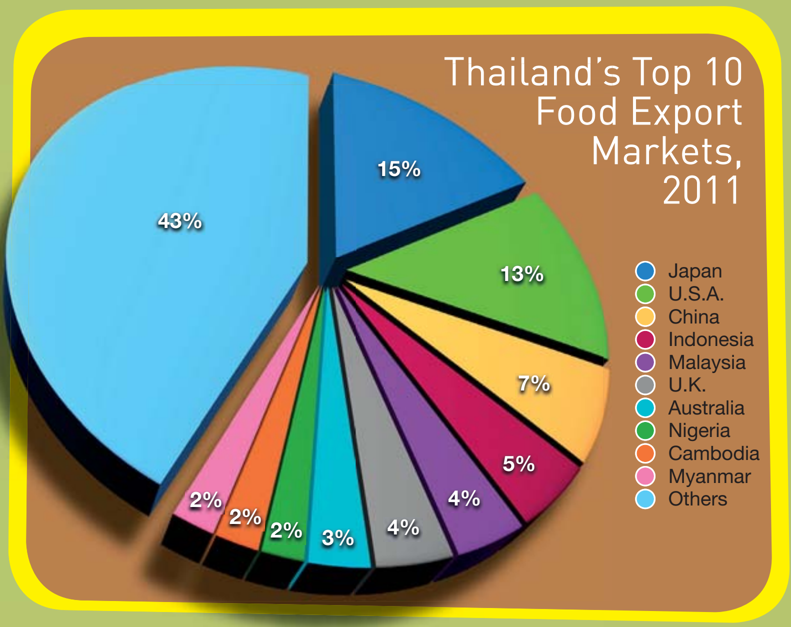
In 2011, Thailand exported 6.5 million tons of sugar, an increase of 58% year-on-year, reflecting rising global demand and falling supply from India, due to severe drought in the country.

Seasonings and Ingredients

Thailand's strengths in food processing have also brought the country to global prominence in the seasonings and ingredients industries. The abundant supply of raw materials for seasoning and ingredients production and the potential for local skills development to manufacture specialty food products such as seasonings make the country an appealing destination for investment.

The value of Thailand's food ingredients exports in 2011 reached US$479 million. Exports of chili sauce totaled US$47 million, followed by instant curry (US$45 million), fish sauce (US$41 million), oyster sauce (US$22 million), soya sauce (US$18 million) and tomato sauces (US$6 million). Additionally, chili sauce and oyster sauce saw annual growth rates in 2011 of 24%, followed by soya sauce (20%).

Thailand's food exports are evenly distributed across major geographic regions globally. In 2011, Japan was Thailand's biggest market for food products, taking 15% of the total the export value, followed by the US at 13%, China at 7%, and Indonesia at 5%.



Source: National Food Institute

"Thailand is a strategic hub of food production for both Asia and the rest of the world due to its biodiversity and natural agricultural productivity. Entrepreneurs in Thailand's agriculture and food processing industries continue to strive to introduce new technologies. In addition, the Thai Government has introduced policies which support food production at high standards of safety and quality. Thailand has both the high potential and the key fundamentals to become a major production base and distribution center for world food production, as well as an attractive destination for international investors."

-Dr. Petch Chinabutr, President of National Food Institute (NFI)-

When Fresh Produce Meets Technology

Thailand's abundant natural resources play a central role in its comparative advantage among its competitors in the food processing industry; 80% of the raw materials in domestic food manufacturing are locally available. The use of these rich natural resources, optimized by the introduction of technology and robust implementation of international standards of food safety and hygiene, will help Thailand remain a world leader in the food processing industry.

Thai Government and industry initiatives have helped Thailand's processed food industry upgrade its procedures and technologies so that its products meet international quality and sanitation standards, thus making them more competitive in the global marketplace. These initiatives have been so successful that processed food exports now exceed primary agricultural exports.

Thai food processors are successfully developing new frozen food products to keep up with shifting tastes in their overseas markets. In 2011, Thailand exported 416,922 tons of ready-to-eat (RTE) food and food ingredients valued

at US$955 million – a 16% increase over the previous year. Thai RTE food is gaining popularity overseas as other countries grow accustomed to Thai quality, nutrition, and taste. Additionally, sauces and curries are enjoying remarkable success in overseas markets. Between 2010 and 2011, annual growth reached 18% with a total value of US$479 million. Major export markets currently include Japan, the US, Philippines and Cambodia.

Although most processed food products are for the international market, the domestic consumption of processed food continues to grow due to changes in lifestyles that have brought about increased demand for convenient food options. These processed food products are available in a wide variety of venues, most notably major Thai supermarkets such as Tesco, Makro, The Mall Group, Big C, Foodland, and Tops.

At present, the Thai food processing industry is comprised of over 10,000 food-processing companies. Major Thai and multinational industry leaders include: Nestle, Saha Pathana Inter Holding, Patum Rice Mill & Granary, Royal Friesland Foods NV, Unilever Group, Thai Union, Dole Thailand, Charoen Pokphand Group, Betagro, Saha Farms, Thai Beverage, Kellogg's, Kraft, PepsiCo, Del Monte, Procter & Gamble, Ajinomoto and Effem Foods.

“Dole Food Company has operated a growing processed fruit business in Thailand for over 35 years. We currently operate three manufacturing facilities and employee more than 8,000 associates.

Dole has invested several million dollars over the past few years to upgrade and expand our production facilities in Thailand. The policies of the Thai government and the incentives offered by the BOI have been beneficial to us as investors and have helped to ensure that we earn a reasonable rate of return on our investments in the Kingdom.”

-Mark Mc Kinney, President of Dole-

Halal: Fast Growing Sector

Halal food is produced in accordance with Islamic dietary guidelines. According to these guidelines, Muslims cannot consume pork or pork products, as well as any other meat that is not properly slaughtered, birds of prey, carnivorous animals, blood products and alcohol. In Thailand, the Central Islamic Committee sets high standards for the accreditation of halal food companies. Thai halal products are processed in accordance with the committee's Standard 2001 (B.E. 2544) regulations, which cover production facilities, raw materials, products, storage, employees, transport and distribution.

Demand for halal food has increased tremendously during the last few years. The global halal food market is now worth an estimated US$667 billion annually. In Thailand, exports of halal products amounted to US$433 million in 2011, a 30% increased from US$333 million in 2010. Up to 60% of the exports went to Indonesia, Malaysia and Brunei. Thailand ranks first for halal exports among the 10 countries in Southeast Asia.

As the global Muslim population continues to grow, the halal market is set to expand rapidly to meet the demand. Thailand's exports of halal food are predicted to grow by at least 10% annually through 2014. The major export markets for Thai halal food are Singapore, Malaysia, Indonesia, Brunei, the UAE, Saudi Arabia and Egypt. As the country with the largest Muslim population in the world, Indonesia is a particularly attractive market. China, with a Muslim population of 30 million, is emerging as a potentially lucrative market for Thai halal food products. Apart from China, Thai halal food entrepreneurs are seeking business opportunities in Mongolia, Russia, Kazakhstan, Kyrgyzstan and Pakistan.

To strengthen the sector, the Thai government has laid out a broad set of strategies to increase exports of halal food, including vegetables, fruit, fishery and livestock products. These strategies also include the plans to encourage hotel entrepreneurs and restaurant operators to improve their services to meet the varying demands of Muslim visitors. These expansion plans also focus on the development of the five southernmost provinces of Pattani, Yala, Narathiwat, Satun and Songkhla as major production bases for halal products in Asia.

“Thailand has abundant raw materials for Halal food production. This has supported the establishment of over 2,000 food processing facilities with more than 35,000 Halal-certified products.”

-Khathawut Lohmud, Head of Academics, Department of Halal Affairs, The Central Islamic Committee of Thailand-

Food Safety and Food Standards

Adherence to the highest quality and hygiene standards is critical to the success in the global food processing industry. Thailand has a number of authorized food safety inspection agencies, including the Department of Medical Science, the Thai Industrial Standards Institute, the Department of Agriculture, the Department of Fisheries, and the Department of Livestock.

The Food and Drug Administration (FDA) ensures product safety by issuing manufacturing licenses, labeling food products, conducting pre-and post-marketing control, and enforcing adherence to Good Manufacturing Practices (GMP). GMP certification is mandatory for manufacturers and importers of 54 different food product types.

The National Bureau of Agricultural Commodity and Food Standards (ACFS) certifies the standards applied to agricultural commodities and food products. ACFS standards include Good Agricultural Practices (GAP), Good Hygienic Practices (GHP) and Hazard Analysis Critical Control Point (HACCP), as well as other standards regarding pesticide residues and diagnostic testing for foot and mouth disease and bovine tuberculosis. Ministry of Public Health's Manual for Labeling Procedures regulates processed food containing genetically modified organisms (GMO).

The food manufacture standards adopted in Thailand draws from the international legal regulations such as Codex, OIE Standards and the International Plant Protection Convention.

Quality assurance systems such as GMP, Total Quality Management (TQM), HACCP, and the International Organization for Standardization (ISO) are mandatory for certain products, including canned foods. The members of the Asia-Pacific Economic Cooperation (APEC) also adopt all of the standards Thailand uses to regulate its food industry.

The National Food Institute (NFI), as part of the team responsible for Food Safety Management in Thailand, promotes food safety by helping entrepreneurs produce products that comply with international standards. It provides the following services:

- Consultancy services in the implementation of GMP/HACCP/ISO 9000/ ISO14000/ ISO/IEC 17025 and Clean Technology Systems Risk Assessment studies;
- Dissemination of information related to food safety regulatory laws and standards; and
- Chemical and microbiological testing of food samples to ensure that products intended for commercial distribution are up to international regulatory standards.

Opportunities

Asia harbors tremendous opportunities for food processors. Food demand in South and Southeast Asia will experience substantial growth as populations and incomes expand. Here are some examples.

Ready-to-eat food

The retail market value of global packaged food is predicted to grow by 9.74% from US$1.95 trillion in 2010 and is expected to reach US$2.14 trillion by 2015. In line with the global market, the local Thai market for package food products is also experiencing significant growth. As lifestyles continue to change, convenient and ready-to-eat processed food products will become increasingly popular. Demand from abroad is expanding as well. In 2011, the export value of ready-to-eat products was US$9.3 billion, 12% higher than in the previous year.

Snacks

Demand of sweet and savory snacks in Thailand has continued to increase, driven by aggressive advertising and marketing activities among leading players in the industry. In 2011, sweet and savory snacks grew by 7% year-on-year in current retail value terms to reached US$840 million. Thailand's market for sweet and savory snacks is expected to reach US$1 billion by 2016.

Resulting from the growth in health-conscious consumers, there has been an increase of health and wellness snacks. Many manufacturers have tried to reformulate their products to reduce the amount of salt or make them salt free, reduced the amount of sugar or make them sugar free and reduce the amount of fat in their products, in response to increased demand from consumers for healthier snacks.

Health food

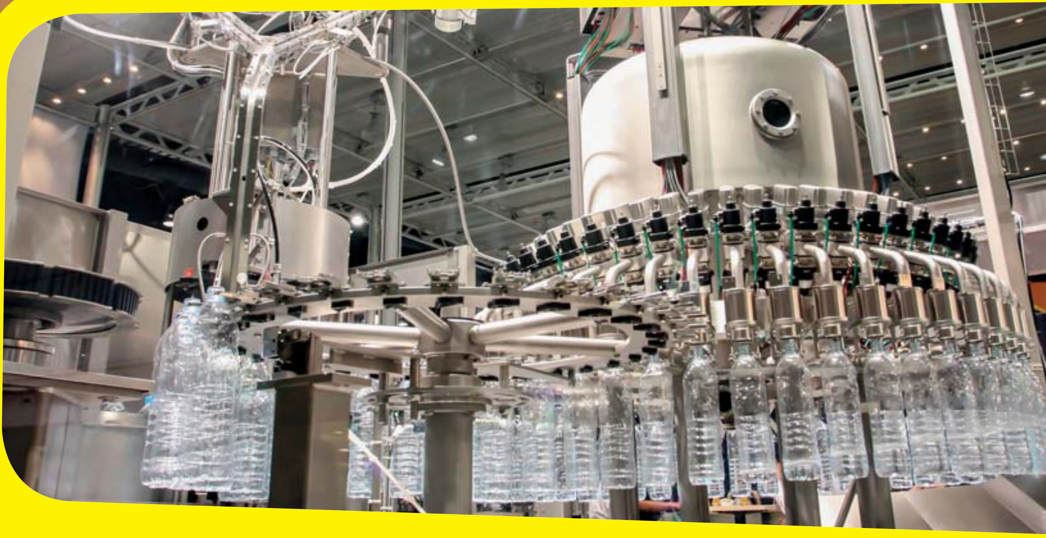
According to the Euromonitor International 2011 report compiled by the National Food Institute, in 2010, health and wellness products sales reached US$627.5 billion and are expected to reach over US$772 billion by 2015. Natural food products occupy the largest market share at 38.5%, fortified/functional food 30.3%, better-for-you food 25.5%, organic food 4.3%, and food allergy products 1.3%.

The Thai domestic market also has strong demand for health food products. According to the National Food Institute, consumer expenditures on health and wellness foods in 2011 grew to US$4 billion, while US$1.7 billion was spent on consumer health foods including sports nutrition, vitamins and dietary supplements, weight management, herbal/traditional products, allergy care and child-specific consumer health products.

Food Machinery and Equipment

The market for food machinery and packaging equipment has been driven by the growth of the general food processing industry. Leaders in the Thai food processing industry are constantly developing cutting-edge technologies to keep up with increasing global demand. For instance, the introduction of the GMP standard for the food safety equipment in 2003 has brought a notable increase in the volume of GMP-level equipment purchased by Thailand-based firms. The market of food processing and packaging equipment in Thailand has grown by an average of 20% every year since 1999. In Thailand, the total trade value of food processing and packaging equipment in 2011 was almost US$ 270 million, a 61% increased from 2010.

Imports of machinery for the preparation of food or drink increased 65% in 2011 to US$166 million. The majority of this equipment was imported from Japan (26%), Netherlands (11%), Germany (11%), and China (10%).



Why Thailand

Thailand offers a number of outstanding advantages for companies in the food-processing industry. These include:

Competitive workforce: According to the Thai National Food Institute, there are approximately 800,000 laborers in Thailand's food industry. Furthermore, the government's numerous training and support organizations will ensure a robust and technically-equipped workforce today and into the future.

Strong Business Climate: Thailand's economy is one of the fastest growing in Asia, with 2012 GDP projected to grow by around 6.5 percent, and the World Bank Doing Business 2012 report indicated that Thailand was ranked 17th in the world and 2nd in Southeast Asia in terms of ease of doing business.

Hub of Asia: The reduction of tariff and non-tariff barriers articulated in free trade agreements between Thailand and India, China, Japan, Australia and ASEAN extends trade opportunities with neighboring countries. Thailand stands out amongst neighboring countries because of its bilateral and multilateral collaboration, excellent infrastructure, abundant raw materials, skilled labor, government support, and the central location among ASEAN countries with close proximity to India and China. Furthermore, the launch of ASEAN Economic Community (AEC) in 2015 will expand the market of Thai food to around 600 million consumers over Southeast Asia.

Excellent logistics systems: Thailand boasts world-class infrastructure, including state-of-the-art ports, airports and communication facilities. Suvarnabhumi International Airport and Laem Chabang Deep Seaport offer manufacturers the transportation foundation investors need for their export operations. The 225 km of inter-city motorways – currently in expansion – linking Bangkok to other regions of the country also facilitate overall domestic transportation. In addition, Thailand is a hub of transportation in the Southeast Asia region; the perfect route through the east-west and north-south corridor that can distribute products to nearby countries including Laos, Cambodia, Vietnam, Myanmar, Malaysia, Singapore and also southern China from the North and Northeast of the country.

Attractive Investment Incentives: Thailand Board of Investment offers a wide range of fiscal and non-tax incentives for investments. Tax incentives include exemption or reduction of import duties on machinery and raw materials, and corporate income tax exemption and reduction. The BOI can offer up to 8 years of corporate income tax exemption. Non-tax incentives include facilitation as regards the entry and sojourn of expatriates and the right to own land. Further information on the incentive scheme can be accessed at www.boi.go.th.

> Jelly Belly's primary reason for investing in Thailand is the availability of raw materials, including GMO-free products. Additionally, Thailand has competitive labor costs and a central geographic position in Southeast Asia.

-Herman G. Rowland Jr., Managing Director of Jelly Belly Candy Company (Thailand) Ltd.-

Developed Network of Supporting Organizations:

Government and organizations supporting the growth and competitiveness of the food processing industry in Thailand include:

<u>The National Food Institute (NFI)</u>

- **The Technological Services Department** assists processors in the implementation of GMP or HACCP safety systems in food production.
- **The Agricultural Research Development Agency (ARDA)** cooperates with the NFI to develop processed food production and agro-food human resources.

<u>The Halal Standard Institute of Thailand</u> helps ensure that the development and certification of halal food standards comply with the provisions of Islam and correspond to international standards so that it is trusted and accepted by local and international public, food producers and consumers which will therefore promote and increase the competitiveness of the country's halal food industry and protect Islamic consumers locally.

<u>The Halal Science Centre, Chulalongkorn University (CU)</u> focuses on the following mission:

- The establishment of halal laboratories fully equipped with modern and high standard analytical and preparative scientific devices.
- Provide analytical services for quality control against inconsistencies with Islamic law (Haram and Najis) in raw materials, and finished products supplied for Halal Food market
- Conduct research and development on new methodologies, product innovation as well as reagent kits exploitable for halal food verification.
- Prepare lists of chemicals, raw materials and products as to accommodate halal food manufacturers and consumers.

<u>Kasetsart University (KU)</u>

- **Institute of Food Research and Product Development (IFRPD)** performs research on food science and technology to assist food industries by providing relevant information to social and academic organizations and communities.
- **KU Food Innovation Research and Services in Thailand (KU-FIRST)** focuses on increasing the competitiveness of the Thai food industry in the world market through the development of food safety mechanisms
- **Cassava and Starch Technology Research Unit** aims to support industrial sectors by conducting R&D on cassava starch properties, starch processing, starch modification and industrial applications. The Unit also coordinates technology between producers and users and facilitates the transfer of technology and supporting technical services.

The Food Processing Industry Club has 8 sub-sectors: beverages; tea, coffee, cocoa milk and dairy products; spice, seasonings, sugar and deserts; meat, poultry and feed; flour and flour products; fishery product; fresh and processed vegetables and fruits; oil, edible fats, and other specialty foods.

Thai Food Processors' Association:

- Tuna Processors' Group
- Seafood Processors' Group
- Pineapple Processors' Group
- Fruit & Vegetable Processors' Group
- Sweet Corn Processors' Group
- Food Ingredient and Ready-to-eat Processors' Group

For further information:

Thailand Board of Investment (BOI): www.boi.go.th

Thai National Food Institute: www.nfi.or.th

The Halal Standard Institute of Thailand: www.halal.or.th/en/main/index.php

The Halal Science Centre, Chulalongkorn University (CU):
www.halalscience.org/en/main2011/index.php

The Food and Drug Administration: www.fda.moph.go.th/enginfo.htm

The Food Processing Industry Club:
www.fti.or.th/FTI%20Project/GroupCallEng.aspx

Thai Food Processors' Association:
www.thaifood.org/Thai_Food_Processors'_Association.htm

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