THAILAND
BOARD OF
INVESTMENT

Thailand's Food Industry

Food Industry in Thailand
"Kitchen of the World"

The combination of abundant natural resources, investments in technology, continuous R&D in the area of food safety and a commitment to international quality standards has helped Thailand's food industry continue to develop and grow. Thailand remains the only net food exporter in Asia, and is one of the world's top producers of food products such as rice, canned tuna, frozen seafood, chicken and canned pineapples.

This is why so many people worldwide have dubbed Thailand as the "Kitchen of the World."

In 2014, Thailand exported approximately US$30 billion of food products to major countries such as Japan, the US, China, UK and ASEAN countries. Moreover, The National Food Institute (NFI) projections that Thailand's food industry in 2015 will increase by 17%. Important Thai food exports are in the following areas:

Thailand's Exported Food Products, 2011 – 2014

Export Items	2011		2012		2013		2014	
	Metric Ton	Million US$	Metric Ton	Million US$	Metric Ton	Million US$	Metric Ton	Million US$
Total Food	27,864,636	29,654	25,098,346	28,726	24,852,590	27,033	30,477,893	28,405
Fisheries	1,669,774	7,977	1,632,453	7,958	1,406,824	6,789	1,419,377	6,322
Tuna, canned	576,399	2,275	559,493	2,660	550,884	2,611	595,479	2,355
Shrimp	394,373	3,630	351,992	3,105	212,724	2,253	167,057	2,002
Fish, Fresh/Dry	406,206	842	398,734	871	338,255	730	365,667	798
Cuttlefish/Aquid	62,951	411	69,756	473	65,475	397	71,352	412
Sardine, canned	72,524	164	112,571	278	97,393	235	75,366	176
Salmon, prepared	13,412	119	14,304	124	20,211	136	16,541	122
Crab	8,490	87	7,631	80	6,883	68	7,465	83
Mackerel, canned	35,493	83	33,787	86	28,960	74	30,876	76
Other	99,926	366	84,185	281	86,039	285	89,574	298
Meat	545,219	2,335	648,676	2,646	640,971	2,689	706,184	2,892
Chicken Meat	466,855	1,979	538,092	2,182	504,376	2,174	545,532	2,279
Sausage	8,500	44	12,863	90	12,696	61	11,114	67
Bovine Meat	11,416	31	19,824	56	8,231	21	11,069	36
Pig Meat	2,577	5	2,070	4	3,840	7	2,635	5
Other	55,871	276	75,827	314	111,828	426	135,834	505
Cereal	11,263,919	6,692	7,028,034	4,857	7,357,086	4,702	11,921,834	5,816
Rice	10,711,549	6,370	6,734,427	4,608	6,611,617	4,355	10,969,335	5,384
Rice flour	9,150	15	123,308	137	121,047	130	127,032	128
Other	543,220	307	170,299	112	624,422	217	825,467	304
Fruit	2,189,739	2,285	2,290,247	2,123	2,292,276	2,224	2,279,198	2,494
Pineapple, canned	641,187	660	586,113	543	564,975	502	528,159	505
Longan, fresh/dry	544,482	473	584,947	394	553,687	404	553,918	415
Durian, fresh	286,594	177	365,412	229	381,184	277	387,098	426
Mangosteen, fresh	111,717	68	149,398	94	215,865	141	195,838	149
Other		907		863		900		999
Vegetable	556,353	645	508,943	612	473,368	601	495,019	629
Sweet corn, canned	184,178	187	172,188	183	167,012	176	199,995	204
Sweet corn, fresh	13,204	16	12,147	15	12,223	15	15,650	18
Asparagus, fresh	6,168	16	5,019	12	2,876	6	3,363	6
Other	352,803	426	319,589	402	291,257	404	276,011	401
Others food								
Sugar	6,521,046	3,602	6,853,112	3,929	5,994,946	2,812	6,293,590	2,710
Non-Alcoholic Beverage	962,011	1,197	1,130,606	1,340	1,448,978	1,499	1,886,789	1,719
Tapioca starch*	1,894,194	928	2,237,932	993	2,451,236	1,135	3,019,855	1,268
Condiment & Seasoning	234,648	472	243,659	503	263,270	545	283,137	586
Alcoholic Beverage	306,386	338	816,809	547	382,110	450	316,088	436
Baby food	125,188	359	114,216	357	131,944	366	145,172	391
Palm oil	381,847	394	292,830	305	549,213	427	221,929	199
Confectionery	41,642	161	44,518	191	43,133	179	39,605	138
Other	1,172,670	2,269	1,256,311	2,365	1,417,235	2,615	1,450,116	2,805

Source: National Food Institute

Fishery products

In 2014, Thailand exported 1.4 million tons of fishery products with a value of US$6.4 billion. The major fishery products were canned tuna, at US$2.4 billion, which accounted for 37% of total fishery export, followed by shrimp at US$2.0 billion and 32% of total fishery exports.

Meat Products

In 2014, Thailand exported 700 thousand tons of meat products with a value of US$2.9 billion. Chicken was the primary meat product, with exports of US$2.3 billion or 78% of the total.

Cereal Products

In 2014, Thailand exported 12 million tons of cereal products with a value of US$5.8 billion. The major cereal product was rice with exports of US$5.4 billion which accounted for 93% of total cereal exports.

Fruit Products

In 2014, Thailand exported 2.3 million tons of fruit products worth US$2.5 billion. Major fruit exports were canned pineapple (US$505 million), longan (US$415 million) and durian (US$426 million). These three fruits products accounted for more than 50% of fruit exports.

Vegetable Products

In 2014, Thailand exported 0.5 million tons of vegetable products. Corn was the major vegetable export (US$222 million), accounting for 35% of the US$629 million in total vegetable exports.

Seasonings and Ingredients

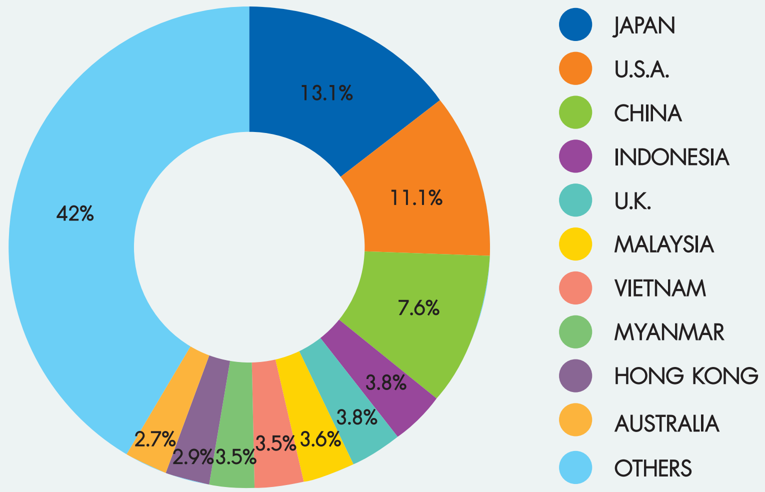
Seasonings and ingredients are key components that greatly affect the food industry, and combining these with Thailand's advantage in food processing has brought the country to global prominence for better products. The abundant supply of raw materials for seasoning and ingredients production coupled with the potential for development local skills to manufacture specialty food products, such as specific seasonings, make the country an appealing destination for investments in this sub-sector.

Thai Export of Food Ingredients

Products	Exports (Million US$)		% Change
	2013	2014	
Chili sauce	53.19	66.21	24.48%
Fish sauce	47.08	48.48	2.98%
Soya sauce	23.00	25.18	9.48%
Tomato sauce	7.72	6.81	-11.74%

Source: Ministry of Commerce: http://moc.go.th/

Thailand's Top 10 Food Export Markets, 2014



Source: National Food Institute

Globally speaking, Thailand's food exports are evenly distributed across major geographical regions. In 2014, Japan was Thailand's biggest market for food products, taking 14% of the total the export values, followed by the US at 11.1%, China at 7.6%, and Indonesia 3.8%.

"Thailand, noted for its natural biodiversity and agricultural production, has great potential to become an Asian regional hub for food production and distribution. With highly motived and competitive food entrepreneurs boosted by a supportive government, Thailand has been pro-actively adopting technological advancement and policies to promote safe and quality food production. The country's rapid infra-structural facilities and transport systems development have strengthened its logistic capacity. Thailand remains as an attractive destination for international investors."

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

TRENDS

The National Food Institute (NFI) has projected 8-22% growth in exports of key food products in 2015.

The Projections for Thailand's Food Export in 2015

Products	% Growth
Shrimp	22%
Chicken meat	19%
Processed vegetables and fruits	8%
Seasonings and ingredients	8%

Source: National Food Institute

WHEN FRESH PRODUCE MEETS TECHNOLOGY

Thailand's abundant natural resources provide the country with a clear comparative advantage in the food processing industry; 80% of the raw materials used in domestic food manufacturing are locally available. The use of these rich and pure natural resources, which has been optimized through the introduction of technology and vigorous implementation of international standards of food safety and hygiene, will help Thailand remain a world leader in the food processing industry.

Thailand is becoming more competitive in the global marketplace. This is happening through industry initiatives implemented by the Thai Government that have helped Thailand's processed food industry upgrade its procedures and technologies so that all products meet international quality and sanitation standards. In fact, the initiatives have proved to be so successful that processed food exports now exceed primary agricultural exports.

To keep up with the changing of tastes in their overseas markets, Thai food processors are successfully developing new frozen food products. In 2013, Thailand exported 432,515 tons of ready-to-eat (RTE) food and food ingredients. The value of RTE and food ingredient exports in 2013 was US$1.02 billion – a 6% increase from the previous year. Demand for Thai RTE food continues to grow overseas as other countries and cultures grow more and more accustomed to Thai quality, nutrition, and taste. Of the many export markets, the main export markets currently include Japan, the Philippines, Cambodia, and the US.

Although most processed food products target the international market, domestic consumption continues to grow due to lifestyle changes that have resulted in increased demand for greater convenience concerning food. Processed food products are available in a wide variety of local retail outlets, most notably major Thai supermarkets such as Tesco Lotus, Makro, Gourmet Market, Big C, Foodland, and Tops.

According to the National Food Institute, the Thai food processing industry currently comprises more than 9,000 processed food factories. Major Thai and multinational industry leaders include: Ajinomoto, Betagro, Charoen Pokhand Group, Del Monte, Dole Thailand, Kellogg’s, Kraft, Nestle, Patum Rice Mill & Granary, PepsiCo, Procter & Gamble, Royal Friesland Foods NV, Saha Farms, Saha Pathana Inter Holdings, Thai Beverage, Thai Union, and Unilever Group.

حلال

HALAL: FAST GROWING SECTOR

Halal food is produced in accordance with Islamic dietary guidelines. In Thailand, the Central Islamic Committee sets high standards for the accreditation of halal food companies and their products are processed in accordance with the committee’s Standard B.E. 2544 regulations.

Demand for halal food has increased tremendously during the last few years. The global halal food market is now worth an estimated US$976 billion annually. According to Thailand’s National Food Institute, The value of halal food exports in 2014 was US$5.8 billion, making Thailand the leader for halal exports among all Southeast Asian countries.

Thailand’s exports of halal food are predicted to increase to US$6.1 billion grow by at last 5.1% 2015, with major export markets including Indonesia, Malaysia, Nigeria, Iraq, Saudi Arabia, the UAE, and Egypt. Since Indonesia has the largest Muslim population in the world, it is a very attractive market,while China, with a Muslim population of 30 million, is growing as a potentially tempting market for Thai halal food products. The Thai government plans to strengthen the sector by laying out a set of strategies aimed to increase exports of halal food products. Expansion plans focus on the development of Thailand’s five southernmost provinces (Pattani, Yala, Narathiwat, Satun and Songkhla) as major production bases for halal products in Asia.

FOOD SAFETY AND FOOD STANDARDS

Adherence to the highest quality and hygiene standards is critical to success in the global food marketplace. 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.

Standards applied to agricultural commodities and food products are certified by the National Bureau of Agricultural Commodity and Food Standards (ACFS). The 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. The Ministry of Public Health's Manual for Labeling Procedures regulates processed foods containing genetically modified organisms (GMO).

The food manufacturing standards that Thailand has adopted derive from international legal regulations, such as Codex, OIE Standards and the International Plant Protection Convention, thus ensuring Thai manufactured foods meet international standards for safety.

Quality assurance systems including GMP, Total Quality Management (TQM), HACCP, and the International Organization for Standardization (ISO) are mandatory for certain products, such as canned foods.

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.
- Chemical and microbiological testing of food samples to ensure that products intended for commercial distribution are up to international regulatory standards.

OPPORTUNITIES

Asia offers tremendous opportunities for food processors. Food demand in South and Southeast Asia will continue to grow as populations and incomes expand throughout the regions.

Ready to eat packaged food

The retail market value of global packaged food is predicted to grow by 14% from US$176 million in 2013 and is expected to reach US$252 million by 2018. In line with the global market, the local Thai market for packaged food products is also experiencing significant growth. As lifestyles continue to change, convenient, quick ready-to-eat processed food products will become increasingly popular. Demand from abroad is expanding as well.

Snacks

Demand for sweet and savory snacks in Thailand has continued to increase, driven by aggressive advertising and marketing activities among leading players in the industry. In 2013, sweet and savory snacks grew by 9% year-on-year in current retail value terms to reached US$967 million. Thailand's market for sweet and savory snacks is expected to reach US$1.25 billion by 2018. In response to increased demand from consumers for healthier snacks, there has been an increased focus on health and wellness snacks.

Health food

According to a Euromonitor International 2013 December report, in 2012, sales of health and wellness products grew by 10% in Thailand. The value of these products reached US$5.24 billion in 2013 and is expected to increase to more than US$6.63 billion by 2017. Products aimed at general wellbeing occupied the largest market share at 56%, followed by energy boosting at 10.3%, which was in turn closely ahead of digestive health and weight management, at 9.8% and 8.2%, respectively.

The Thai domestic market has committed itself to produce health food products due to an increased focus on healthier lifestyles. This leads to the key point, which is that demand for health and wellness products in Thailand continues to see growth and gains through positive responses from the local community. Therefore, opportunities in this market sector are expected to expand in years to come.

Food Machinery and Equipment

The market for food machinery and packaging equipment has been primarily driven by the growth of the general food processing industry. The leaders of the Thai food processing industry are constantly developing cutting-edge technologies to keep up with ever-increasing global demand. For instance, the introduction of the GMP standard for food safety equipment in 2003 has resulted in a notable increase in the volume of GMP-level equipment purchased by Thailand-based firms.

Opportunities have grown exponentially as Thailand sets its sights on becoming the Kitchen of the World. As the food industry in Thailand expands, investments in high-technology equipment soars, food machinery and packing equipment sectors are experiencing explosive demand as well. While the demand for such machinery is mostly met from overseas, the exponential growth of the sector provides opportunities for the investment of domestically produced machinery to satisfy market demands. Consequently, the kingdom offers an excellent location for investment in the food machinery and other food related technology sectors.

Thailand is able to locally produce food processing machinery such as individual quick freezers, shrimp processing machinery, and canned tuna processing machinery. However, most food processing machinery is imported from abroad. According to the Iron and Steel Institute of Thailand, the value of imported machinery for food processing in 2013 was US$245 million. The majority of food processing machinery was imported from Germany (28%), China (16%), and Japan (6%). Meanwhile, the value of imported machinery for packaging in 2013 was US$456 million. The majority of packaging machinery was imported from Germany (26%), Japan (15%), and Italy (12%).

OTHER OPPORTUNITIES

Opportunities for investment also exist in the following areas:

- Manufacture of biological fertilizers, organic fertilizers, nano-coated organo chemical fertilizer and bio-pesticides
- Plant or animal breeding (only those that are not eligible for biotechnology activity)
- Economic forest plantation (except for Eucalyptus)
- Crop drying and silo facilities
- Animal propagation or animal husbandry
- Slaughtering
- Deep sea fishery
- Grading, packaging and storage of plants, vegetables, fruits or flowers
- Manufacture of modified starch or starch made from plants that have special properties
- Manufacture of oil or fat from plants or animals (except for soybean oil)
- Manufacture of natural extracts or products from natural extracts (except for medicine, soap, shampoo, toothaste and cosmetics)
- Manufacture of active ingredients from natural raw materials
- Manufacture of products from agriculturalby-products or agricultural waste (except for those with uncomplicated production processes, e.g. drying, dehydration)
- Manufacture of fuel from agricultural products, including agricultural scrap or garbage or waste
- Manufarture or preservation of food, beverages, food additives or food ingredients using modern technology (except for drinking water, ice cream, candy, chocolate, gum, sugar, carbonated soft drinks, alcoholic beverages, caffeinated beverages and flour or starch made from plants, bakery products, instant noodles, essence of chicken and bird's nest)
- Manufacture of medical food or food supplements
- Cold storage transportation
- Trading centers for agricultural goods

WHY THAILAND

"The food industry in Thailand is thriving and Cargill is delighted to be a part of it. With Thailand's great natural resources, creative people and strong workforce, Thailand is an ideal place to be in the food business. The government is also incredibly supportive of multinational companies investing in Thailand, which has been a key to our success."

-Bruce Blakeman, Vice President for Corporate Affairs in the Asia-Pacific region of Cargill -

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 660,000 laborers in Thailand's food industry. Furthermore, the government's numerous training and support organizations ensure a robust and technically-equipped workforce that is ready to go today and will be around in the future.

Strong Business Climate: Thailand's economy is one of the fastest growing in Asia. The World Bank's Doing Business 2014 report indicated that Thailand was ranked 18th in the world and 3rd 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 within ASEAN extends trade opportunities with neighboring countries. Thailand stands out amongst these countries because of its bilateral and multilateral collaboration, excellent infrastructure, abundant raw materials, skilled labor, government support, and the central location among ASEAN countries, as well as close proximity to India and China. Furthermore, the eventual launch of ASEAN Economic Community (AEC) will expand the market of Thai food to more than 600 million consumers across Southeast Asia.

Access to raw materials and its proximity to one of the largest sea ports in Asia" are the main advantages that Thailand offers Jelly Belly as a location.

Thailand has wonderful people and a great culture. We are looking forward to many more years in Thailand.

- Mike Bianco, Senior Vice President of Global Operations of Jelly Belly -

Excellent logistics systems: Thailand boasts world-class infrastructure, including state-of-the-art ports, airports, and communication facilities. These include Suvarnabhumi International Airport and Laem Chabang Deep Seaport, which 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. Additionally, 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.

DEVELOPED NETWORK OF SUPPORTING ORGANIZATIONS

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

The National Food Institute (NFI)

- ***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.

The Halal Standard Institute of Thailand 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. This will therefore promote and increase the competitiveness of the country's halal food industry and protect Islamic consumers locally.

The Halal Science Centre, Chulalongkorn University (CU) 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.

Kasetsart University (KU)

- ***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 at the Thai Federation of Industries 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

Attractive Investment Incentives

Thailand Board of Investment offers a wide range of fiscal and non-tax incentives for investments. Tax-based incentives include exemption or reduction of import duties on machinery and raw materials, and corporate income tax exemption and reduction. Non-tax incentives include permission to bring in expatriates, own land and take or remit foreign currency abroad.

For further information:

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

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

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

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

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

The Food Processing Industry Club: http://www.foodfti.com/

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

Kasetsart University (KU): http://www.ku.ac.th

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