

Food & Beverage Trends and Import & Export Projection

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- Chairman of Food Processing Industry Club,
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Thai Food Processors' Association



TFPA has approximate 220 companies gathering as members of the association. Members of food processors have been categorized into 5 major groups,

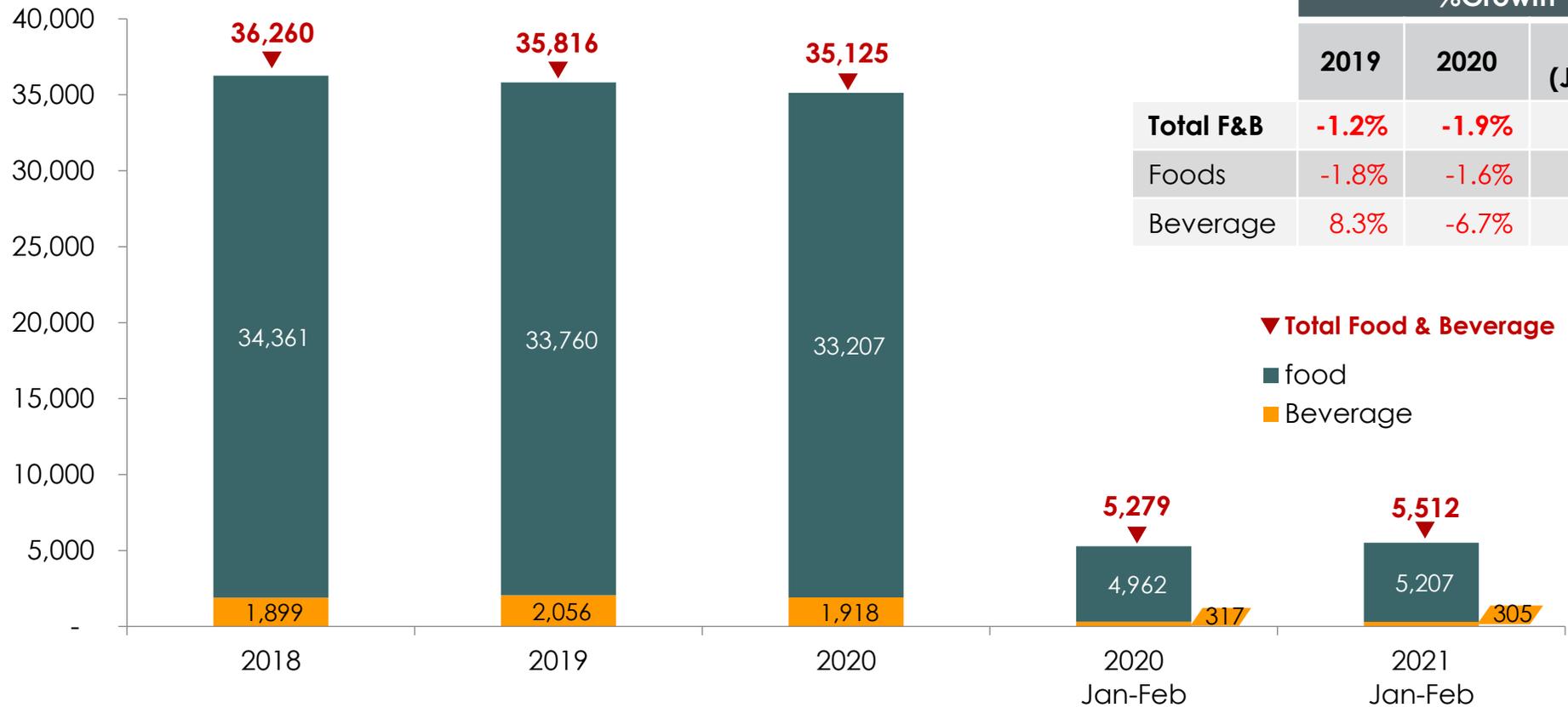
- Pineapple
- Tuna & Seafood
- Sweet Corn
- Fruit and Vegetable
- Ingredients and Ready to Eat Food

TFPA was established with the following key objectives:

1. To promote and to develop the establishments and processed foods
2. To provide the highest quality of scientific assistance and programs in support of member needs.
3. To serve as a communication link between members and government agencies.
4. To represent as a speaker for the collective problems and obstacles in food processing industry.

THAILAND FOOD&BEVERAGE EXPORT VALUE

Value (Million USD)



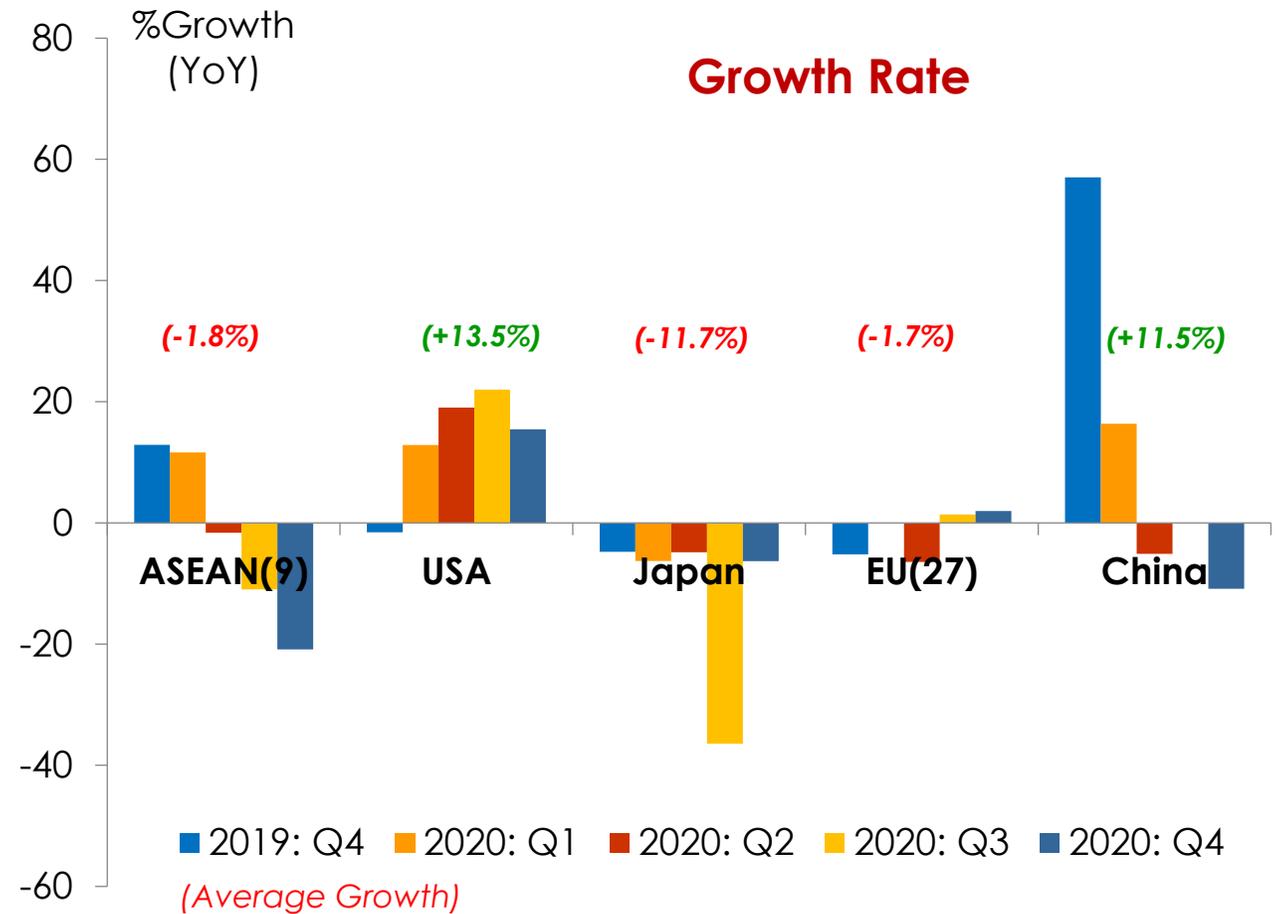
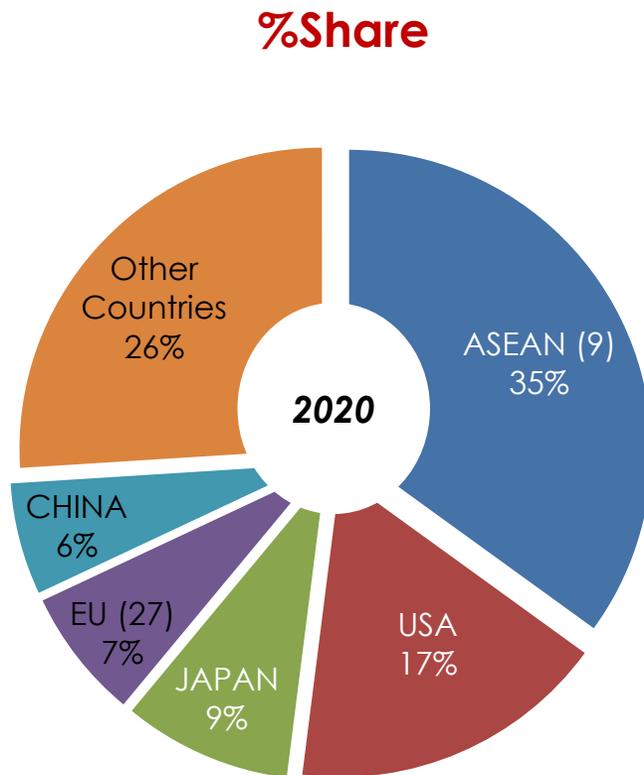
	%Growth		
	2019	2020	2021 (Jan-Feb)
Total F&B	-1.2%	-1.9%	4.4%
Foods	-1.8%	-1.6%	4.9%
Beverage	8.3%	-6.7%	-3.8%

▼ Total Food & Beverage

■ food

■ Beverage

Thailand's Key Exporting Markets on Processed Foods



What Challenge Thai Food Business Face in 2020

- The container shortage since the 2Q2020 until now.
- The abundant increasing of freight rate.
- Work force shortage cause from the Covid19 pandemic.
- All kinds of packaging cost have increased significantly.
- Enlarging cost from hygienic preventive measure for Covid19.
- Baht's strength.
- Drought in 1H2020.

Rank of World Food exporter in 2020

No.		GROWTH
1	USA	6.6%
2	Netherlands	1.1%
3	Brazil	8.6%
11	Indonesia	13.4%
12	India	4.5%
13	Thailand	-5.1%
14	Poland	4.4%
15	Mexico	3.7%
16	United Kingdom	-1.2%
17	Vietnam	-2.4%

Thailand Standing in 2020

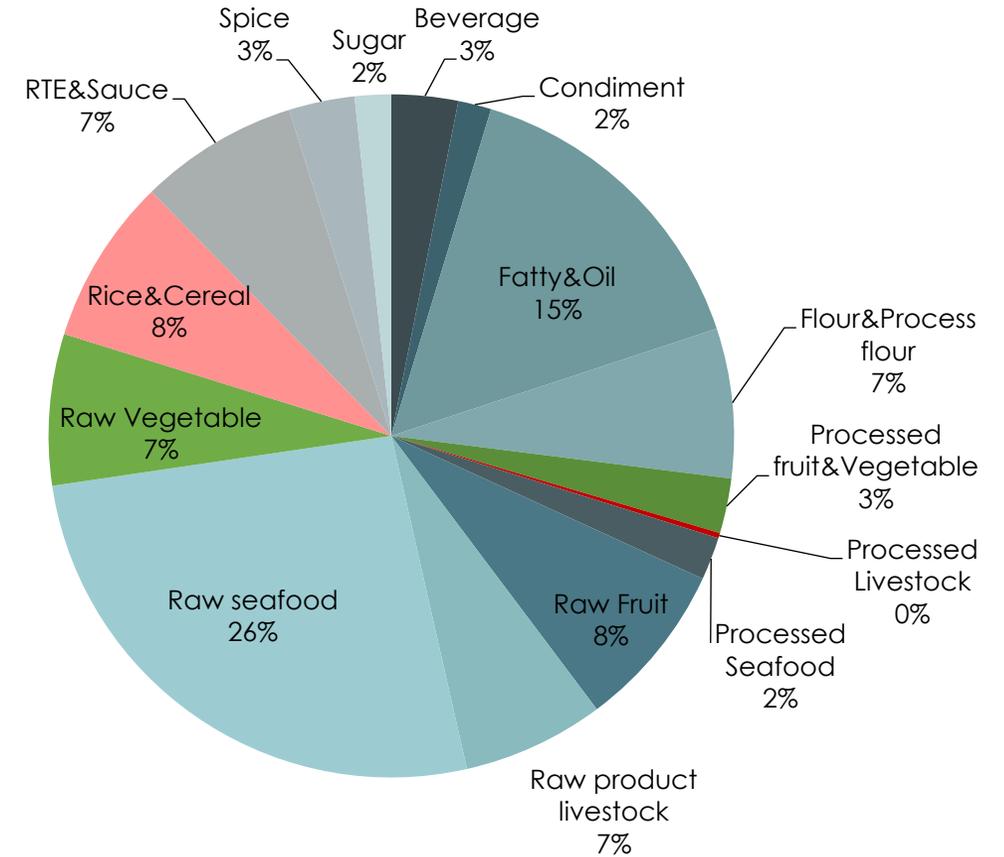
- Top 13th of the world food exporter.
- Top 4th of Asia food exporter. (China , Indonesia , India)

Opportunity for Thai food business improvement

- ✓ E-commerce platform development.
- ✓ Production line development to be more automation processing.
- ✓ Personal improvement by training to be upskill, reskill or new skill.
- ✓ New product development to be safety and healthy under the sustainability processing.
- ✓ Import some essential raw material for the processing.

THAILAND'S IMPORT VALUE

Value (Million USD)



How Covid-19 Is Changing Southeast Asia's Consumers Payment Behavior

Unit : % total respondents

Buy More Items;

Personal Hygiene 60%

Health/Nutrition 55%

Home Cleaning 40%

Buy Less Items;

Alcoholic Beverages 30%

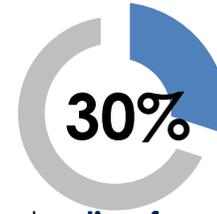
Luxury Items 27%

Meat / Seafood 21%

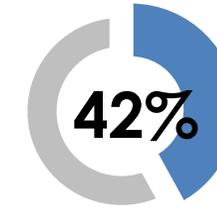
Eat out 52%

Leisure Activities 52%

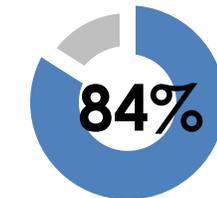
Shift to online



Shopped online for something they usually found offline

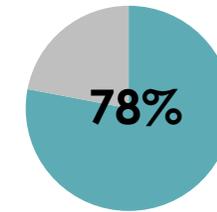


Shopped online for groceries "in the last two weeks"

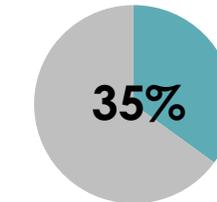


First-time users of digital apps

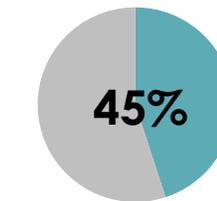
Who'll shift shopping online



45-to 54-year-olds tried digital apps for first time



Aged 55+ plan to shop more online in the future



Low-income respondents plan to shop more online vs. 58% for high-income respondents

Source : SCB Economic Intelligence Center / Kantar World Panel

Source : YouGov syndicated tracker Analytics; Toluna Global Barometer, Forbes; industry participant interviews

Food Trend 2021



Plant Based Food



low sugar & low sodium & Low Fat Foods



Insect Protein



Plant Based Meat



**Functional Food ;
Healthy drink, vitamin water**



Food Standard

Food Safety is the most important

The packaging trends for 2021

1. Sustainable material

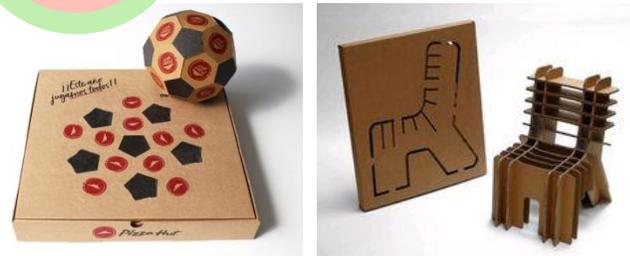
- Less plastic packaging
- less multi-material packaging
- mono-material packaging



2. Safe Packaging



3. Second life of packaging



4. Design and sustainability



5. Social media logo, Eco symbols and Eco properties

Eco symbols



Eco properties

