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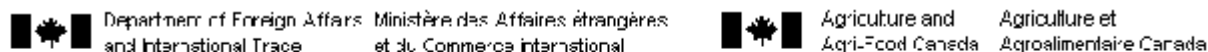


The Snack Food Market in Thailand

July 1997

*(Également disponible en français sous le titre,
Le Marché des Aliments de Collation en Thailand)*

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and the
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THE SNACK FOOD MARKET IN THE THAILAND



EXECUTIVE SUMMARY

This report examines the market for snack foods in Thailand. It is intended to provide Canadian exporters with market information. The information contained in this report was drawn primarily from secondary sources and the Canadian Embassy in Bangkok.

The snack food market in Thailand reached C\$300 million in 1995. Forecasts indicate that the sector should continue growing at a rate of 17% until the year 2000.

Canada does not have a large share of the market, but Canadian products do have a reputation for high quality. There may be an opportunity for a Canadian exporter.

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THE SNACK FOOD MARKET IN THAILAND



Retail sales of snack food grew 27% between 1991 and 1995 to reach C\$300 million. The Thailand snack food market is dominated by local manufacturers who also export a significant portion of their production. Imports of snack food increased substantially between 1991 and 1995, but remain a small portion of overall domestic sales. In 1995 imports of chips totalled C\$0.38 million and nuts totalled C\$1.91 million. Accurate import data on extruded snacks was not available.

MARKET OVERVIEW

Market size and projections

The 27% growth rate, for snack foods, was more than double the rate for confectionery products. Within the snack food market, nuts have the largest share with 43.9% of sales followed by chips at 29.2% and extruded snacks with 26.9%. Growth in each of these sectors differed dramatically. Sales of chips enjoyed the highest growth, with sales increasing 66% between 1991 and 1995 followed by extruded snacks growing 26% and nuts growing 12%.

There are a number of factors contributing to this growth. Thailand has a per capita GDP of C\$300, a level substantially higher than the Philippines and Indonesia. Correspondingly, Thais are more likely to be able to afford such non-essential items as snack food. As well, domestic firms have pursued aggressive marketing which is having the effect of increasing all snack food sales. Also distribution has improved substantially making snack foods more widely available.

Table 1. Snack food sales in Thailand, 1991 to 1995 and projections to 2000

	<u>Crisps</u>		<u>Extruded Snacks</u>		<u>Nuts</u>	
	Value (in C\$ millions)	Volume (in tonnes)	Value (in C\$ millions)	Volume (in tonnes)	Value (in C\$ millions)	Volume (in tonnes)
1991	48.72	7 405	69.74	10 815	117.44	19 070
1992	55.64	8 665	74.62	11 550	127.44	20 215
1993	63.33	9 965	79.49	12 310	132.05	21 105
1994	71.79	11 285	83.59	13 070	131.59	21 385
1995	80.77	12 525	87.59	13 854	131.69	21 812
1996	na	13 652	na	14 655	na	22 250
1997	na	14 745	na	15 460	na	22 650
1998	na	15 850	na	16 230	na	22 990
1999	na	16 640	na	16 950	na	23 200
2000	na	17 470	na	17 630	na	23 410
Growth:						
1991-						
1995	66%	69%	26%	28.1%	12%	14.4%
1996-	na	28%	na	20%	na	5.2%
2000						

Source: Euromonitor, *The Market for Packaged Foods in South East Asia*, 1996

Future prospects are also favourable for growth in the snack food sector. As the income gap narrows between urban and rural consumers in Thailand, sales will expand beyond Bangkok. Also as economic conditions are predicted to continue improving, Thais will increasingly be able to afford non-essential food items. Predictions indicate that snack foods should experience a growth rate of approximately 17% between 1996 and 2000, with chips growing the fastest at 28% (See Table 1).

The competitive environment

The Thailand snack food market is highly competitive. It is dominated by domestic companies which produce mostly for export. Leading the snack food market are Bangkok Agro Industrial products, ISA Company, and Central Food which together have a 69% market share (See Table 2).

In the last few years, a number of multinationals have entered the market, through joint ventures and straight imports. Imported goods tend to be approx. 30%-50% more expensive. However some products, such as potato chips, retail for approximately the same as domestic products.

Growth in imports of snack foods far outpaced growth in overall domestic sales of snack foods. Potato chip imports alone grew over 800% to reach C\$0.38 million, although this still represents a very small portion of overall sales. The source of these potato chips has been quite sporadic over the last five years, but the majority have originated in Spain, the Netherlands and the United States (See Table 3). Imports of nuts stood at somewhat higher levels totalling C\$1.9 million in 1995, up 134% from 1991. The United States was by far the dominant supplier with 73% of the imported nuts market (See Table 4). Import data on extruded snacks was not available.

Table 2. Snack food market shares in Thailand, 1995

	Sector Share (% value)
Osothsapha Co	40
Central Food Products	20
Laemthongh Food Products	8
Hesco Food	7
Pegui Food	5
Friendship Co.	5
Thai President Food	5
Sun Yang Food	1
Others	9

Source: Euromonitor, *The Market for Packaged Foods in South East Asia*, 1996

The Canadian position

In the years between 1991 and 1995, Canada exported only C\$25 886 in potato chips, all in 1995. During this same time frame, there were no nuts imported from Canada. Canadian exports are likely hampered by high transportation costs and the lower cost Thai produced snack foods. However, in general, Canadian food products are regarded as being of high quality by Thai consumers so there may be opportunity for a dedicated Canadian exporter.

Table 3. Top five exporters of potato chips to Thailand, 1995 (in C\$)

Supplier	1991	1992	1993	1994	1995
World	39 880	22 000	416 630	288 750	383 390
Spain	-	-	-	86 630	316 250
Netherlands	39 880	22 000	20 630	28 880	39 880
Canada	-	-	-	-	25 886
Kuwait	-	-	-	-	1 380
United States	-	-	376 750	126 500	-

Source: International Trade Data Bank, TIERS

Table 4. Top five exporters of processed nuts to Thailand, 1995 (in C\$)

Supplier	1991	1992	1993	1994	1995
World	815 380	1 028 880	1 523 500	1 524 880	1 908 500
United States	500 500	675 130	948 750	939 130	1 394 250
Germany	57 750	137 500	347 880	224 130	166 380
Japan	22 000	52 250	48 130	110 000	155 380
Singapore	140 250	163 630	94 880	101 750	81 130
United Kingdom	-	-	-	-	77 000

Source: International Trade Data Bank, TIERS

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DISTRIBUTION CHANNELS

Overview of distribution system

Importers and intermediaries

Canadian exporters must select a local representative in Thailand, who may do some or all of the following: import product, deal with regulatory agencies, handle local sales, distribute directly to retail and foodservice outlets and promote the product locally. See Appendix C for a list of importers.

Finding a local representative is one of the toughest challenges for new exporters to Thailand. The Thai market is competitive and difficult to enter. Most distributors are hesitant to represent new products and may rely on exporters to provide marketing support to help promote new products.

The Thailand Business Association of Canada provides its members with business information, helps them establish joint ventures, and helps them find distributors, importers and agents in Thailand. Canadian exporters can join this association for a one-time membership fee of C\$1000.

Retail distributors

Thailand has two major supermarket chains: Siam Macro and Big C, owned by Charoen Pokphand(CP) Group and Central Supermarkets respectively. Each company operates six stores in Bangkok and have combined revenues of C\$1.5 billion. Both companies have developed big discount stores, Lotus and Big C Supercentre, and have plans for stand-alone supermarkets. These standalones differ from their existing supermarkets as they are separate from large department stores.

Aside from these major stores there are a number of smaller grocery stores. In particular, Mah Boonkrong Sirichai Supermarket, has been particularly successful in carving out a market niche in the suburbs of Bangkok. Its chain of 23 stores are within walking distance of most of the affluent Thai population, a big advantage as many people prefer to avoid Bangkok's significant traffic problems.

Convenience marts are new to Thailand, but have proven immensely popular and now make up a considerable proportion of the retail distribution system. The largest operators include CP (7-Eleven) which owns and operates nearly 700 stores, Robinson (Family Mart) which has 500 stores, and Central (Central Mini) which has 50 stores. Of these 7-Eleven is the fastest growing with the number of stores expected to double over the next several years. 7-Eleven is one of the few chains in Thailand that charges listing fees.

Promotional considerations

Advertising and trade promotion are important marketing tools in Thailand. Foreign suppliers often provide promotional support to supermarkets in the form of sample products, advertising and discounted prices.

A product is best introduced to the market through participation in trade shows. Supermarket promotions should be reserved for those products that have already attracted consumer interest (through trade shows for example).

There are two major English-language newspapers in Thailand, *The Bangkok Post* and *The Nation*, and several Thai-language newspapers, of which the most popular dailies are *Krung Thep Turrakit* (Bangkok Business News) and *Manager*. In addition, there are a number of trade shows

(as listed in Appendix B) where Canadian exporters could exhibit their products.

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CONSIDERATIONS FOR MARKET ENTRY

The following section provides an overview of local standard and regulations, documentation and procedures, duties, taxes and tariffs which apply to imported snack foods. However, Canadian exporters should contact their agent or importer in Thailand to obtain the most current information.

Local standards and regulations

Health and food safety

There are no specific requirements for snack foods, only the 3 standard FDA requirements apply:

- Import license
- Product registration
- Labelling requirements

Details are provided below.

Packaging and labelling

All containers must be clean, must never have been used before, and must not emit any matter which is potentially dangerous when in contact with food.

All labels must be registered with the Thai Food and Drug Administration prior to importation and must be affixed to food products imported for sale in Thailand. The Thai language must be used on all labels; however, many imported products feature an add-on label to meet local language requirements.

Labels must bear the following information in Thai:

- kind and type of food;
- trade name;
- registration number issued by FDA
- name and address of the manufacturer or producer;
- net contents in metric units;
- main ingredients in approximate percentage of weight;
- production and "best before" date markings;
- storing instructions;
- name of distributor/ importer and their address;
- use of preservatives, colouring agents, flavouring agents, MSG; and,
- instructions for food intended to be used in infant and specific groups.

Documentation and procedures

Required documentation

All shipments of food to Thailand, including snack food, must be accompanied by the proper import licenses, food registration certificates, and shipping documents. All documentation must be in English or be accompanied by an English translation.

Exporters should note that the import licensing and food registration processes must be repeated each time a different agent/importer seeks to import a product, even if the imported product has been previously approved by the Thai Food and Drug Administration.

a) Import license

Ordinarily, the exporter's local agent will submit an application for an import license to the Thai Food and Drug Administration (FDA) for review and approval. For this, the Thai FDA requires the following documentation:

- An application form for importing foods and beverages, obtained from the Food Control Division of the Thai FDA.
- A copy of the exporter's domestic registration.
- A copy of the exporter's trade or commerce registration.
- A copy of the exporting company's registration which declares its objectives and declares the authorized agent/importer in Thailand.
- A copy of a document certifying the nationality of the agent/importer (including a list of its shareholders) obtained from the Thai Ministry of Commerce. If an applicant is an alien, a certificate of operating business in Thailand is also required.
- Letter of power of attorney if the exporter has an agent/importer acting on their behalf.

An application fee of 15 000 baht (C\$810) is charged for this service. Licenses are valid for three years.

b) Food registration

All food products imported to Thailand must be registered with the Thai Food and Drug Administration. The application fee for each registered product is 5000 baht (C\$270) and on average takes between 3 and 6 months for approval but can take as long as a year. The following forms must be submitted when registering food products.

- Seven copies of the completed application form.
- Five product labels in Thai and English.
- Two samples of snack food in unit size.
- Seven copies of a laboratory analysis (approximate cost C\$300) of the product from a government agency or respectable institute in Canada, submitted no later than one year from the date of analysis. Additional analyses must be coordinated if other ingredients are declared on the label (e.g., vitamins, minerals, nutrients, food colours, preservatives or flavourings).
- Seven copies of a letter which certifies the manufacturer - issued by the agency that conducts the food analysis - if this firm is not specified on the product label.

c) Shipping documents

The following shipping documents must be presented to customs officials by the agent/importer upon the entry of exported goods into Thailand:

- Commercial invoice — signed by the exporter in triplicate.

- Pro-forma invoice required by the importer to obtain an import license and to establish letter of credit.
- Bills of lading — three signed originals and at least two unsigned copies.
- Packing list — a minimum of seven copies.
- Import license.
- Insurance certificate.
- Certificate of origin — occasionally requested by an importer, bank or letter of credit clause.
- Foreign transaction form — obtained from the Thai Customs Department and submitted when the c.i.f. value exceeds 500 000 baht (or C\$26 900).

Authentication of documents

The Thai government will often require certain documents to be authenticated, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf. The exporter's local agent/importer should advise which documents need to be authenticated. Firstly, exporters must begin by having all the necessary documents notarized in Canada. Secondly, the notarized documents must be authenticated by sending them to (there is no fee for this service):

Department of Foreign Affairs and International Trade
Authentication and Service of Documents (JLAC)
125 Sussex Drive
Ottawa K1A 0G2
ATTN: Mario Nuñez-Suarez
Telephone: (613) 992-6602
Facsimile: (613) 992-2467 or 944-0870

Thirdly, the notarized and authenticated documents must be sent to the Royal Thai Embassy in Ottawa for final authentication. Canadian exporters are recommended to have these documents returned to them following final authentication. Finally, the exporter should forward these documents to their agent/importer in Thailand.

Customs duties, tariffs and taxes

Imported goods face arbitrary custom valuation procedures by the Thai Customs Department. The department keeps records of the highest declared prices on previous imports and uses these prices to assess tariffs on subsequent shipments of similar products from the same country. Also, the Customs Department reserves the option to use the price from either the country of origin or country of shipment, whichever is higher. Thus in many cases, when assessing tariffs, Customs officials disregard the invoice value of the imported product.

In general, ad valorem duties of 60% are levied on imported foodstuffs. A value-added tax (VAT) of 7% is levied on the duty-paid value of the goods and is payable in addition. The specific duties on snack foods are 30% or Baht 25/kg.

Transportation and storage

Most exports of snack food are shipped to Thailand by sea. Bangkok itself has four major freight terminals; two others are located at Bang Sue, which is near the ports of Sattahip and Laem Chabang. Most consumer goods are transported inland by road. Thailand has over 42 000 km of national and provincial highways which are in some disrepair and congested — thus making efficient distribution of goods throughout the country difficult. The majority of Thailand's interprovincial highways are being upgraded to four lanes, which is likely to ease distribution.

Export financing and payment

Most sales to Thailand are conducted on letter of credit terms. Letters of credit with terms in excess of 270 days require Bank of Thailand approval. Confirmed irrevocable letters of credit are advised for new, small and private accounts. Payments for imports may be made through any authorized bank.

Cultural and business practices

Canadian exporters need to understand the cultural nuances of doing business in Thailand. Business is always conducted face to face, never over the telephone; however, appointment times are sometimes viewed to be flexible. Meetings with government officials are formal and ritualized.

The traditional Thai greeting is the *Wai*, which resembles the prayer position of the hands; however, most North Americans are greeted with a handshake. Business cards are exchanged at almost every meeting. Socialization is polite and formal, so it is important to avoid criticism, conflict and bluntness. The business community tends to dress formally, but black clothing is generally reserved for funerals only.

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Agriculture and Agri-Food Canada, *Export Market Assessment Report: Thailand*, August 1996.

Department of Foreign Affairs and International Trade, *Thailand: A Guide for Canadian Business* (InfoCentre code 18CA), June 1995.

Department of Foreign Affairs and International Trade, *Directory of Food Importers in Thailand and an Overview of Opportunities in the Food Industry for Canadian Companies* (InfoCentre code 153CA), 1994.

Euromonitor International, *The Market for Packaged Foods in South East Asia*, Great Britain: 1996.

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APPENDIX A — STATISTICAL TABLES

Potato chip exports to Thailand, 1991-1995 (in C\$) (SITC 5676)

Supplier	1991	1992	1993	1994	1995
World	39 880	22 000	416 630	288 750	383 390
Spain	-	-	-	86 630	316 250
Netherlands	39 880	22 000	20 630	28 880	39 880
Canada	-	-	-	-	25 886

Kuwait	-	-	-	-	1 380
United States	-	-	376 750	126 500	-
Singapore	-	-	19 250	31 630	-
Japan	-	-	-	15 130	-

Source: International Trade Data Bank, TIERS

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APPENDIX B — TRADE SHOWS AND PROMOTIONAL VENUES

Event/Venue	Description	Organizer
Food & Hotel Asia (Asian International Exhibition of Food & Drink, Hotel, Restaurant & Catering, Equipment, Supplies & Services)	World Trade Centre Singapore, Singapore April 14-17, 1998	Singapore Exhibition Services Pte Ltd 2 Handy Road #15-09 Cathay Building Sing 0922, Singapore Tel: (65) 338-4747 Fax.: (65) 339-9507
International Hospitality Show, a Food and Beverage Show	Queen Sirikit National Convention Center Bangkok, Thailand JUNE 5-8,1997	Tel: (66-2) 279-4721/4722
Thailand Food Fair	Queen Sirikit National Convention Center Bangkok, Thailand June 12-15, 1996	Thai Ministry of Commerce Department of Export Promotion 22/77 Rachadapisek Road Bangkok 10900 Tel: (62-2) 511-5066 Fax: (62-2) 512-2670

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APPENDIX C — SNACK FOOD IMPORTERS IN THAILAND

Actwell Company Limited Contact: Chinnawat Leksrisakul 93/95, 3/F, Modern Group Tower Pakkred, Nonthaburi 11120 Telephone: (662) 574-6388 Facsimile: (662) 574-6389	Comrade and Col. Co. Ltd. Contact: Kasem Pornvitvorakul 38/20 Soisathupradit 6, Sathuprad Road Sathorn, Bangkok 10120 Telephone: (662) 213-0366 Facsimile: (662) 213-0376
--	--

Central Department Store Ltd.
 Contact: Miss Jitrinee Vitthuhakorn
 1027 Ploenchit Road
 Patumwan, Bangkok, 10330
 Telephone: (662) 255-6955 ext. 2640
 Facsimile: (662) 255-5754

U. Lek Trading Co. Ltd.
 Contact: Thavee Pulsirivit
 782/263 Soi Sukswd. 26, Suks. Road
 Rajburana, Bangkok 10140
 Telephone: (662) 428-1424
 Facsimile: (662) 427-21

Champaca Co., Ltd.
 Contact: Charn Dharmavanij
 142/4 Soi Suksavithaya, Silom
 Bangkok 10500
 Telephone: (662) 235-4580/1, 235-3257
 Facsimile: (662) 238-1694, 236-8062

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APPENDIX D — KEY GOVERNMENT CONTACTS AND SUPPORT SERVICES

Canadian government contacts

Department of Foreign Affairs and
 International Trade
 Southeast Asia Division (PSE)
 125 Sussex Drive
 Ottawa K1A 0G2
 Contact: Mr. Khawar Nasim
 Telephone: (613) 995-7662
 Facsimile: (613) 944-1604

Canadian Export Development Corporation
 151 O'Connor St
 Ottawa, K1P 5T9
 Telephone: (613) 598-2500
 Facsimile: (613) 598-2503

Canadian Embassy in Thailand
 12th Floor, Boonmitr Building
 138 Silom Road
 Bangkok 10500
 Contact: Mr. Ken Lewis, Counsellor
 (Commercial) and Consul
 Telephone: (66-2) 237-4126
 Facsimile: (66-2) 236-7119

Agriculture and Agri-Food Canada
 Sir John Carling Bldg
 930 Carling Ave
 Ottawa, K1A 0C5
 Contact: Lucie Goyette
 Telephone: (613) 759-7616
 Facsimile: (613) 759-7506

Thailand government offices in Canada

Royal Thai Embassy
 180 Island Park Drive
 Ottawa, K1Y 0A2
 Telephone: (613) 722-4444

Royal Thai Embassy
 Office of Commercial Affairs
 275 Slater St, Suite 1801
 Ottawa, K1P 5H9
 Telephone: (613) 238-4002
 Facsimile: (613) 238-6226

Royal Thai Consulate General
 44th Floor, Scotia Plaza
 40 King Street West
 Toronto, M5H 3Y4
 Telephone: (416) 367-6750
 Facsimile: (416) 367-6764

Thailand government offices in Thailand

Thai Ministry of Public Health
Sam Sen Road
Bangkok 10200
Telephone: (66-2) 282-4180-5, 282-8330
Facsimile: (66-2) 281-8199

Department of Medical Sciences
Division of Food Analysis
6th Floor, Building #5
693 Bamrung Muang Road
Yot-Se, Bangkok 10100
Telephone: (66-2) 223-9873

Thai Ministry of Agriculture and Cooperatives
4 Rajadamnoen Nok Avenue
Bangkok 10200
Telephone: (66-2) 281-5955
Facsimile: (66-2) 281-3514

Thai Ministry of Commerce
Department of Foreign Trade
Commodity Trade Division
Rajadamnoen Klang Road
Bangkok 10200
Telephone: (66-2) 282-8198
Facsimile: (66-2) 282-0827

Department of Science Services
Rama IV Road
Bangkok 10400
Telephone: (66-2) 246-0065

Thai Ministry of Commerce
Public Warehouse Organization (Or-Kor-Sor)
Maharaj Road, Bangkok 10200
Telephone: (66-2) 222-8821
Facsimile: (66-2) 226-2653

Thai Customs Department
Thanon Sunthornkosa
Klong Toey, Bangkok 10110
Telephone: (66-2) 249-0431
Facsimile: (66-2) 249-2874

Chambers of commerce and industry associations

Thai-Canadian Chamber of Commerce
19th Floor, CP Tower
313 Thanon Silom Road, Bangkok 10500
Telephone: (66-2) 231-0891
Facsimile: (66-2) 231-0893

Enterprise Thailand-Canada
19th Floor, CP Tower
313 Silom Road, Bangkok 10500
Telephone: (66-2) 231-0894
Facsimile: (66-2) 231-0900

Board of Trade of Thailand
150 Rajbopit Road
Bangkok 10200
Telephone: (66-2) 221-0555

Thailand Business Association of Canada
280 Spadina Avenue, 4th Floor
Toronto, M5T 2E3
Telephone: (416) 597-8212

Thai Chamber of Commerce
150 Rajbopit Road
Bangkok 10200
Telephone: (66-2) 221-3351
Facsimile: (66-2) 225-3372

Asia-Pacific Foundation of Canada
999 Canada Place, Suite 666
Vancouver, B.C., V6C 3E1
Telephone: (604) 684-5986
Facsimile: (604) 681-1370

Canadian banks in Thailand

The Bank of Nova Scotia (Representative Office)
 14th Floor, Sathorn Thani Building 1
 30/37 North Sathorn Road, Bangkok 10500
 Telephone: (66-2) 236-6043/5512
 Facsimile: (66-2) 236-5980

The Bank of Nova Scotia
 17th Floor, Sathorn Thani Building
 90/46-48 North Sathorn Road
 Bangkok 10500
 Telephone: (66-2) 236-0293/0294
 Facsimile: (66-2) 236-4462

Canadian Imperial Bank of Commerce
 19th Floor, CP Tower
 313 Silom Road, Bangkok 10500
 Telephone: (66-2) 231-0894
 Facsimile: (66-2) 231-0900

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READER EVALUATION

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by facsimile at (613) 943-8820. Thank you for your valuable input.

1. How did you obtain a copy of this market report?

- InfoCentre FaxLink system
- Government worldwide web site
- InfoCentre help line
- InfoCentre bulletin board system
- Local government office
- Other: _____

2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well written	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideal length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. In what form do you prefer to obtain these reports?

- Print
- Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.

- Seek an agent/distributor
- Contact Canadian trade office abroad
- Visit the market
- Participate in a trade show abroad
- Do more research
- Nothing
- Other: _____

5. What other market reports would be of benefit to your organization? Please identify specific products and countries.

6. Which of the following categories best describes your organization? Check one only.

- Processor/manufacturer Government
- Trading house Student/academia
- Export service provider Consultant
- Industry/trade association Other: _____

7. What were your organization's total sales last year, in Canadian dollars?

- Less than 10 million 10 million to 50 million
- More than 50 million Not applicable

Additional comments/suggestions for improvement: _____

OPTIONAL — The name of your organization is: _____

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