THAILAND SEAFOOD MARKET AND POTENTIALS FOR PERUVIAN PRODUCTS

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1. Introduction

Thailand is one of the main players in the world seafood industry. In 2012 fish production totalled about 3.0 million MT, while exports reached 1.91 million MT valued at 264.4 billion Baht (US$8.8 billion) making Thailand ranked 3rd in the world's main exporters behind China and Norway. Thailand is also important market in Asia, imported around 1.67 million MT of seafood products worth Baht 100 billion (US$3.3 billion) last year. During the last decade, there has been a great deal of expansion in the frozen shrimp and cephalopods processing industries as well as tuna canneries. Thailand is now world biggest producer and exporter of canned tuna and shrimp. It imports seafood products from all over the world and Peru is increasingly becoming one of the important suppliers to Thailand.

Domestic production, on the other hand, is on the downward trend for the past decade due to the declining marine capture fisheries while aquaculture particularly shrimp has been facing diseases related problems in recent years. Having huge seafood processing capacity and at the same time growing domestic demand due to increasing disposable income of local consumers, imports of fishery products are on the rise and are expected to increase further in the years to come.

2. Demand Analysis for Seafood Products

2.1.1. Demand trends

Fish is well integrated in local diets and it is a major source of protein for Thais. The annual average seafood consumption is around 30 kg per capita per year. With a total population of more than 66 million in 2012, the domestic market can absorb over 2 million MT of fishery products per year.

Fish supply into the domestic market was estimated at around 2.37 million MT last year largely came from the domestic production, though there have been increasing contribution from imported products. **Table 1** represents the dynamic of apparent fish supply to the domestic market. Fish supply reached the highest record in 2005 at 2.65 million MT, dropped to 1.87 million MT in 2010 then went up to around 2.37 million MT last year. According to officials from the Fisheries Department of Thailand, the actual per capita consumption is higher by 2-3 Kg from the published figures as there are significant amount of unrecorded fish caught or harvested particularly from freshwater fish sector in inland areas.

Table 1 : Apparent fish supplies and per capita fish consumption

Year	Total production (1,000 MT)	Trash fish (non food use)(1,000 MT)	Imports (1,000 MT)	Exports (1,000 MT)	Total fish supply 1)	Population (1,000 MT)	Apparent Consumption (Kg/Capita)
2004	4 100	772	1 330	2 070	2 588	61.97	41.76
2005	4 106	755	1 561	2 261	2 651	62.42	42.48
2006	4 030	673	1 559	2 433	2 484	62.83	39.53
2007	3 675	583	1 473	2 299	2 266	63.04	35.94
2008	3 204	443	1 619	2 343	2 038	63.39	32.15
2009	3 287	469	1 667	2 312	2 174	63.50	34.23
2010	3 063	419	1 683	2 462	1 866	65.40	28.53
2011	2 899	382	1 670	1 975	2 212	65.98	33.53
2012*	3 000	384	1 666	1 908	2 374	66.00	35.97

Source: Department of Fisheries, Thailand.

* preliminary data

1) Total fish supply: Total production - trash fish + imports – export

Consumer's disposable income continues to rise along with expenditures on food and beverages, which was predicted to reach US$71 billion in 2011. Per capita disposable income rose 63% to US$3,181 in 2011. The typical Thai diet consists of rice, seafood, meats, eggs and vegetables. In 2012, spending on food and non-alcoholic beverages accounted for 32.5% (Baht 5660) of all household expenditures (Baht 17,403). Although dining out is becoming increasingly popular, there is still a general preference among Thais to cook at home. Thus, about 65% of total spending on food and beverages occurs at retail food markets, while food service accounts for the remaining 35%.

Local products and popular tropical species like tilapia for freshwater fish and mackerels, pomfret, shrimp, squid for marine products dominate consumption. The fresh fish market is highly segmented on the basis of different species and product ranges. Live and fresh fish are the most popular forms consumed by local consumers. After fresh fish the next most popular items for locals are dried/salted fish products such as dried anchovy, dried squid and dried/smoked fish, which are distributed through wet markets and also supermarkets.

Imported products in retail and food service channels are generally consumed by middle and upper income Thai consumers, expatriates, foreign tourists and business visitors. Norwegian salmon is dominant products sold in retail outlets and catering sectors in addition to exotic cold water species like cod, green mussel, oyster, crab and lobster.

2.2 New Trends

In line with consumer's changing life style, increasing income and growing modern retail outlets, there has been an increasing demand for more convenience, ready to cook and ready to eat as well as microwaveable seafood based products both in fresh/chilled, frozen and prepared/preserved forms. Nevertheless, fish is mostly still consumed in fresh form and wet markets (traditional markets) are still popular places to buy fish and the bulk of fish is prepared at home despite increasing spending for food outside home.

At retail sector, fresh/chilled products still dominate seafood counters including in modern distribution networks like chain stores and hypermarkets. Most fresh fish and seafood in Thailand's retail channels are local products, with the portfolio of products being highly fragmented in terms of species. The mainstream supermarkets and hypermarkets and some of the specialty retailers have separate display areas for live fresh/chilled fish, frozen products, ready to eat products (e.g. deep fried and smoked products), microwavable meals and dried as well as canned seafood products.

In recent years there has been great variety of value added seafood products being offered to provide more convenience to consumers like fillet, portion and steaks in addition to whole and dressed fish. Some supermarkets also offer in store cooking counter where consumers can pick fish of their choice and ask the counter to cook for them for eating at home. They usually offer ready deep fried fish and the most common deep-fried products are from freshwater fish like tilapia, gourame and walking catfish.
Consumption of canned products especially canned tuna, sardines and mackerel is also high, supplied mainly by local products. *Sealect*, *Ayam* and *Three Lady Cooks* are the leading brands in Thailand and it is estimated that their combined market share is more than 60%. There are many other brands of canned products available in the market. Packers have developed great variety of recipes for canned seafood to cater local tastes such as *tom-yum,* curry, smoked, hot chilli and spread in

addition to traditional products such as in water, vegetable oil and also in tomato sauce.

The retail channels for frozen fish products are now highly developed and tend to involve brand-specific frozen fish. Seafood display cabinets sell products of a small number of major local brands. The *Prantalay* and *CP* brands are key players in some leading hypermarket channels, e.g. Lotus Tesco and Big C. Value added seafood products in Thailand are well developed. The products that used to be mainly for exports now find their way to local markets. Great variety of value added products are sold in major retailers and also in convenience stores with improved packaging and presentation. Packs of fresh fish in various cut forms, breaded products, surimi based products, ready to eat and cook products from various species are common features in retail sector. There are increasing number of private (supermarket) brands which are getting popular as consumers are looking for value for their money under the current economic situation.

The catering sector (restaurants and hotels) generates big business in Thailand as revenue from tourism is a very important part of the country's economy. White tablecloth restaurants usually serve high-value fresh and live fish, both local and imported. Local species like Asian sea bass, grouper, shrimp, crab and squid are still the most popular items included in the menus.

The past 10 years has seen salmon become more popular in a range of different menus in Thailand, including in Thai food outlets. Prior to this period, salmon had an extremely small niche market in some high end hotels and single site western and Japanese food outlets. In Bangkok for example (Population: 12 million persons) is reported to have around 3,000 mid to high end restaurants, and many of them use salmon in their menus.

Thailand has a sizeable number of Japanese food service outlets. They include independence restaurants, restaurant chains, noodle chains and quick service outlets. Industry sources said that these outlets are very important for salmon and also for Japanese mackerel (*Saba*). Many hotels have Japanese restaurants and there is also a vibrant sushi sector within the industry. Sushi is very important for the salmon market in Thailand. There are also some sizeable and developing Japanese restaurant chains, which include Fuji (30 outlets, including 10 in urban areas outside

Bangkok) and Nippon Tei – The Tokyo Grill (7 outlets). In addition to these restaurants, there are also Korean restaurants that have demand for *Saba*.

Salmon is even being used by some Chinese restaurants in dishes, including in dim sum by the MK chain of outlets. Imported crabs and lobster have their biggest demand bases in Chinese restaurants (seasonal peak being around Chinese New Year) and in high end hotels. Other exotic imported products which are in demand from the food service industry, are halibut, mussels, oyster, lobster and geoduck.

2.3. Consumers Demand

2.3.1 Major products consumed

As indicated above Thai consumers consumed on average around 30 Kg of fish per year. Latest data available from FAO (2009) indicated that Thai consumers mainly eat the following commodity groups:

- Freshwater fish = 9.3 Kg/capita/year
- Pelagic fish = 9.2 Kg/capita/year
- Molluscs = 2.6 Kg/capita/year
- (Cephalopods) = 1.5 Kg/capita/year
- Crustaceans = 1.0 Kg/capita/year
- Demersal fish = 0.9 Kg/capita/year

There is not much change for the past few years, thus the above data is still valid to give a good insight review of consumer's preferences. Freshwater and pelagic fishes are clearly the most popular products being consumed as almost 62% contributes to the total fish consumption in Thailand. The followings are breakdowns in term of species preferred:

- Freshwater fish: Tilapia, walking catfish, Asian sea bass, pangasius, gourame, snakehead, carps, freshwater prawn
- Pelagic fish: mackerels, anchovy, sardines, tuna and tuna like species such as tonggol.
- Molluscs: squid, cuttlefish, bivalves
- Crustaceans: *Vannamei* shrimp, other shrimps, crabs, lobsters
- Demersal fish: threadfins bream, pomfret, groupers, flat fish (halibut, sole), ribbon fish.

The bulk of the supply of the above comes from local production particularly for freshwater, shrimp and pelagic fish except for tuna which is mainly imported from all over the world with Indonesia, Taiwan and Japan as the main suppliers. There is also increasing imports of pangasius mainly from Vietnam. Significant proportion of lobster and crabs is also imported mainly from Australia, Canada and the US to cater high end restaurants.Thailand also imports significant amount of cephalopods for local consumption particularly squid. The main suppliers for imported squid are Peru, China, India and Pakistan.

Most fish is sold fresh and even some imported frozen products are being re-freshed (thawed) and sold it as fresh products at retail outlets. Fresh fish is largely sold in bulk and the most common packaging for fresh fish is in tray (Styrofoam) packaging. Tray pack, flexible plastic and pouch packaging are commonly used for frozen products as well as dried and prepared products.

Microwavable container which has two compartments is used for ready meals products which are widely sold in supermarkets and in convenience stores like 7-Eleven and Family Mart.

2.3.2. Prices

Similar to the global trend, seafood prices in Thailand have been on the rise for the past few years. According to the data from the Fisheries Department, average wholesale price of squid (*Loligo spp*) for example has increased from around Baht 90-100/Kg in 2010 to currently (early October 2013) around Baht140/kg, up by more than 50%. Meanwhile average wholesale price of *vannamei* has doubled for the past one year due to mainly short supply. Large sizes of vannamei (40-50 pieces/Kg) were priced at Baht 220-225/Kg in July 2013 compared to Baht 125-130 a year ago. The price of medium sizes of 60-70 pieces increased from Baht115-120 to Baht197-214 during the same period.

Below price indices show that the prices of all type of fish have been on the rise particularly for marine fish.

Table 2: Price indices for the month of September (Base year 2011=100)

Products	2011	2012	2013
Fish and aquatic animals	101.15	104.88	**113.14**
Fresh water fish	101.63	102.48	110.00
Marine fish	99.94	106.68	112.43
Aquatic animal	101.68	107.81	122.67
Processed fish	100.54	105.33	109.86
Processed aquatic	100.40	103.85	108.50

2.3.3. Demand for products offered by Peru

The followings are brief analysis for demand for products offered by the Peruvian exporters who are going to participate in the business meeting namely squid (giant squid and Loligo), anchovy, mackerels, mahi-mahi, hake, scallop and shrimp.

a. Squid

Giant squid is the only product from Peru which is prominently displayed in major supermarkets like Big-C and Tesco-Lotus. It is sold as fresh (re-freshed) products of different parts such as wings, tentacles, fillet and necks. The followings are the prices of giant squid in Big C and Tesco hypermarkets in Bangkok in October 2013:

Big C supermarket:

- Tentacles and fillet: Baht 79/Kg
- Wings: Baht 75/Kg
- Necks: Baht 69/Kg

Tesco-Lotus (promotion prices):

- Tentacles: Baht 85/kg
- Wing: Baht 55/Kg
- Fillet: Baht 55/Kg from the original price of Baht 85/Kg

The above prices were only more or less half of the price of Loligo squid which was sold at Baht 140-145/kg (skinless) in these two supermarkets. The price factor and also flexibility of giant squid may be the main factors for this product to be easily accepted by local consumers. Checking around Bangkok, there are many road side traders who sell grilled giant squid (skewered) for consumers to take away. The increasing popularity of giant squid can be confirmed with the growing imports of frozen squid from Peru for the last two years making Peru is the largest supplier (in quantity) of imported frozen squid into Thailand. Imports of frozen squid from Peru grew from merely 5749 MT in 2010 to 24426 MT in 2012 which took almost 50% of the total imports. In value terms however, India took the lead as it is mainly Loligo squid which fetch higher price than giant squid.

Table 3 : Thailand's Imports of Frozen squid

Partner Country	2010		2011		2012	
	MT	US$1 000	MT	US$1 000	MT	US$1 000
India	11 055	25 979	9 096	26 868	9 909	33 143
Peru	5 749	5 766	8 339	11 085	24 426	25 020
China	3 334	6 456	3 999	6 933	5 493	12 202
Japan	1 465	3 800	2 266	7 224	2 260	7 334
Pakistan	1 051	1 780	1 773	3 476	2 090	4 514
Chile	388	409	1 477	1 842	2 251	2 422
Philippines	126	702	220	1 851	228	2 317
Indonesia	2 944	4 148	2 384	5 309	1 325	2 217
Argentina	417	970	586	1 565	875	1 705
Total (incl. others)	32 708	62 062	34 694	75 804	52 607	99 496

Source of Data: Thai Customs Department

Growing popularity of giant squid is also well reflected in this year imports. For the first half of this year (January-June 2013), Thailand imported more than 25000 MT of frozen squid from Peru worth US$31.2 million, up by almost 242% in quantity against the same period of last year, and more than volume imported during the whole year of 2012.Part from being sold as fresh product in the local market, imported giant squid is also re-processed into value added products for exports. However, it is difficult however to estimate how much is sold in the local market and how much is being processed for re-export.

Consumption of cephalopods products among Thai consumers is relatively high as explained above. It is sold as fresh, frozen and also dried forms. There is a market for canned squid but it is relatively very small.

b. Scallop

Scallop market in Thailand is very small mainly to cater high end restaurants and to local Chinese consumers. Supplies come from both domestic production and also from imports.According to the official figure, Thailand produces only very small quantities of scallops, i.e. less than 500 MT per annum. Imports comprise live, fresh/chilled, frozen and dried products. Fresh, frozen dried scallop imports in 2012 were 814 MT worth US$6.6 million. Premium grade scallops are imported from Japan, the USA and France while China and Indonesia are supplying lower grade products. There is no record of scallop imports from Peru. Fresh scallops are readily available in Thailand's mainstream or high end supermarkets and hypermarkets. While this is the case, imported products only exist in a frozen form in some expatriate oriented supermarkets, e.g. Villa Market. Industry sources said that frozen scallops are disadvantaged by the inherent demand for live and fresh seafood in most food service channels, and competition from local alternative fish and seafood products. There is niche demand from high end fish and seafood restaurants for live and fresh chilled scallop, especially from Chinese/other Asian restaurants, both single site operations and those based in hotels. High end restaurants in Bangkok are the key targets for live and fresh/chilled scallops because these operations usually do not use frozen scallops in their menu items.

c. Mackerels

Mackerels are among the most popular pelagic fishes in Thailand but the bulk is locally supplied. Imported mackerels are used both for local consumption and also as raw materials for re-processing industry. Thailand's imports of frozen mackerel amounted to 77 196 valued at US$88.7 million in 2012.Import data for the first eight months of 2013showed the drops in imports of frozen mackerels from 47 738 MT in 2012 to 33 775 MT this year, or declined almost by 30%. This category includes a range of different fishes that are officially defined as mackerel. These are sourced from warm waters (tropical species) and cool waters (temperate species). The main suppliers of frozen mackerel are China, Japan, Norway, India and Pakistan. China supplies Thailand with warm water and cold water mackerels.

It should be noted that Thailand also produces warm water species that are classified as mackerel, which are highly entrenched in the local food culture. The main suppliers of cool water mackerel to Thailand are Japan, Norway and South Korea. Japan is the price setter in this segment. There has been increasing popularity of Japanese mackerel (Saba) sold in most of retail markets not only in Japanese or Korean supermarkets but also in hypermarkets like Big-C and Tesco Lotus. This fish also sold as cooked products (smoked) in the retails. In the past 5 years there has also seen some frozen value added cold water mackerel products enter the Thai market, e.g. Teriyaki Sauce Grilled Saba, which retails at Baht 150 per 140gm retail pack, as produced by The Union Frozen Products Co., Ltd.

Table 4: Imports of Mackerels into Thailand

Partner Country	2010		2011		2012	
	MT	US$1 000	MT	US$1 000	MT	US$1 000
China	11 727	10 679	24 921	25 097	30 805	28 204
Japan	13 604	12 975	24 829	25 045	26 727	24 659
Norway	3 181	7 979	4 183	14 965	8 604	22 350
Vietnam	854	1 110	4 930	6 943	5 837	9 143
India	44 033	50 220	36 084	43 740	5 567	8 232
Korea South	2 191	1 651	3 436	2 890	3 469	4 168
Malaysia	2 376	3 871	5 583	7 036	1 425	4 139
Pakistan	10 300	13 711	16 766	18 945	1 924	3 482
Total	96 104	113 231	126 529	153 469	88 096	110 883

Source of Data: Thai Customs Department

The dominant mackerel in the market is locally caught. Significant amount of imported mackerel is also used by its canning industry. The most common use is for canned mackerel in tomato sauce. Other more niche style canned products also exist, e.g. mackerel in Teriyaki sauce. A number of producers are involved in producing these products, e.g. Sealec, Nautilus, Ayam Brand, Three Lady Cooks and Roza. Trade sources also comment that the canning industry is also involved in OEM production for foreign brands. Mackerel is one of the main fish used by the industry, the others being tuna (the main input) and sardines.

d. Anchovy/sardines

Anchovy is the most popular small pelagic fish eaten in Southeast and Far East Asia. But this is not similar to Peruvian anchovy. In Asia anchovy is small and it is mainly consumed in dried form though there is also small niche markets for canned anchovy and also fresh anchovy.Since the size of the Peruvian anchovy is bigger it may be used for the substitute of locally caught sardines. While the local sardine has a lower fat content and is smaller, Peruvian sardine has a higher fat content and bigger in size.

Thailand imported more than 181 000 MT of frozen sardines in 2012 and the bulk went for re-processing. Imports have been on the rise from only 63000 MT in 2010 to 181 506 in 2012. During this period, imports of frozen sardines has tripled mainly due to declining local catches. The main suppliers of imported frozen sardines were China, Mexico, USA, Netherlands, Japan, and India.

Table 5 : Imports of Frozen Sardines into Thailand

Partner Country	2010		2011		2012	
	MT	US$1 000	MT	US$1 000	MT	US$1 000
China	3 126	1 946	37 447	28 780	44 042	45 384
Mexico	5 073	3 957	17 756	16 441	29 152	29 888
United States	15 219	11 028	6 516	4 593	23 604	19 749
Netherlands	10 769	6 630	5 567	3 946	18 627	15 875
Japan	2	38	9 597	7 220	18 580	15 332
India	918	512	10 552	6 431	16 130	9 509
Germany	-	-	-	-	7 388	5 855
Canada	3 258	2 634	763	1 102	4 672	4 848
Spain	5 808	3 490	13 110	9 581	5 222	4 438
Yemen	14	6	512	317	6 148	4 102
Pakistan	154	81	3 944	2 362	3 897	2 364
Total (incl. others)	63 136	43 286	113 755	87 711	181 506	160 578

Source of Data: Thai Customs Department

e. Shrimp

Thailand is the largest producer and exporter of shrimp in the world. However for the past two years shrimp industry has been facing Early Mortality Syndrome (EMS) problem and this year production is expected to drop to around 250-300,000 MT, from normally around 600,000 MT. To keep the local shrimp processing plants running, there has been increasing imports of shrimp from other countries, including from the Latin American countries like Ecuador and Argentina.

Total shrimp imports in 2012 recorded at almost 26500 MT valued at US$79.7 million. The bulk of the imports went for re-processing industry. The main suppliers of shrimp are Canada, India, Pakistan and Argentina. Thailand imported both cold water as well warm water shrimp to feed its processing industry.

Table 6: Imports of shrimp into Thailand

Partner Country	2010		2011		2012	
	MT	US$1 000	MT	US$1 000	MT	US$1 000
Canada	2 316	9 967	1 284	6 639	1 897	12 217
India	688	3 055	349	2 353	1 048	8 104
Argentina	340	2 496	1 310	9 697	993	6 492
Russia	289	2 768	631	5 069	750	6 464
United States	8	272	34	278	677	6 235
Pakistan	670	2 251	523	1 943	1 229	5 584
Greenland	1 822	8 273	1 001	5 130	807	5 108
Mozambique	110	771	180	1 412	446	3 487
Myanmar	354	1 834	488	2 648	473	2 548
Malaysia	8 138	2 735	13 773	3 041	9 147	1 951
Indonesia	4 602	918	9 314	1 532	6 704	1 490
Total	21 988	51 391	30 515	51 275	26 485	79 667

Source of Data: Thai Customs Department

f. Other fishes

With regard to the market for other marine fish like hake and mahi-mahi, the local market can absorb only very small quantities, mainly for re-processing for re-export. Some portion of mahi-mahi may also go to catering sector. Due to low market for these species not much information can be gathered for this report.

2.4 Demand from Seafood Industry (Processors)

Thailand has one of the world's largest seafood processing industry. The industry is fragmented and so there are many buyers of imported fish raw material. Overall, this market segment is significantly larger than food service and retail industry buyers. According to the official data there are about 200 active industrial seafood processors. Around 120 are higher grade seafood processors which are approved to export their products to developed markets such as the EU, US and Japan. Many of them are working with OEM contracts. The processing companies produce and export a wide variety of products, including basic raw frozen products to semi processed and value-added products.

Industry sources estimated that domestic landings can supply only around 40-50% of raw materials needed by the processing industry, while the rest (50-60%) has to come from imports. The main commodity groups imported as raw materials are:

- Fresh and frozen tuna
- Fresh and frozen fish (whole) such as mackerels, sardines, salmon, etc.
- Frozen Cephalopods (squid, cuttlefish, octopus)
- Frozen shrimp
- Fresh, frozen cockles

Table 7: Imports of seafood raw materials into Thailand 2010-2012 (Q=MT; V=Baht million)

Products	**2010**		**2011**		**2012**	
	Q	**V**	**Q**	**V**	**Q**	**V**
Fresh, frozen tuna	831008	36371	787089	43226	728367	51623
Fresh, frozen cephalopods	62752	3767	66778	4479	77422	5045
Fresh and Frozen whole fish	574946	18982	659344	23485	695445	25073
Fresh and frozen shrimp	8305	1335	6723	1257	9687	2111
Fresh, frozen cockles	12633	120	12092	146	7118	88

Source: Department of Fisheries, Thailand, 2013.

Imports of tuna raw materials have been on the declines for the past two years mainly due to the lower supplies and skyrocketing skipjack prices. Imports of raw materials which showed increasing trends are cephalopods particularly squid, shrimp and also frozen fish. Significant amount of frozen squid and also frozen fish like mackerels and salmon are being consumed locally, thus the increasing imports do not necessarily increasing demand for raw material from processing plants.

Tuna and shrimp processing are two major industries in Thailand producing export oriented products. Tuna processing industry produces canned tuna and also pre-cooked tuna loins.

Thailand is the home of the largest canned tuna producer and exporter, Thai Union Frozen Products Plc which owns Chicken of the Sea (USA) and MW Brands (Europe). The players in this industry produce for their own brands and also under OEM contracts for foreign brand-owners. Tuna raw materials, mainly frozen skipjack, are imported from all over the world. Thailand also imports semi-processed tuna product for canning materials mainly pre-cooked tuna loins from China and also Indonesia. Other smaller sectors of the canning industry are canned mackerel and sardines which are both exported and sold locally. Raw materials for mackerel and sardines are mainly sourced locally but there is also significant amount of imported raw material particularly frozen sardines.

Meanwhile shrimp processing industry depends largely on the local supplies. In recent years, however, the industry has been increasingly buying raw materials from overseas due to the drop in the domestic production, though the amount is relatively small compared with local production. Thailand used to produce around 500-600,000 MT of farmed shrimp annually, more than 90% is vannamei. However, the EMS problem has cut the production to around 300,000 MT only this year. The main suppliers of imported shrimp are India, Bangladesh, Myanmar and Vietnam, as well as Canada and Iceland (for cold water shrimp). The imported shrimp is processed into value-added products for export to USA and Japan as well as Europe.

Imports of fresh and frozen fish consist of both tropical and cold water fish for both re-processing and also for local consumption. The main fresh and frozen imported for local consumption are pomfret, salmon, ribbonfish and croaker and also mackerel while the bulk of the sardines is re-processed for canning.

Base on the above, Peru has great potential to supply the following raw materials to Thai seafood processing industry:

- Squid (both giant and Loligo squid)
- Frozen mackerel
- Frozen sardines (anchovy) for canning also for pet food industry
- Frozen shrimp

Giant squid has already had a strong foot in Thai market for both processing and local consumption. Frozen shrimp also has good prospect as Thailand need additional raw materials to fill the gaps left by the declining local production. Shrimp production in Thailand is not expected to resume to normal level within the next few years. Many Thai packers however, are still not familiar with horse mackerel and Peruvian anchovy as raw material for canning. Thus more efforts are needed to introduce these products to the industry in Thailand.

The buyers from the processing industry source their raw materials on a global basis and generally have a very good knowledge of the supply bases across the world, including from Peru. Imported fish is brought into Thailand through trading companies or direct from foreign suppliers (exporters) depending on the products and country of origin. Tuna/skipjack are mostly bought through trading companies while shrimp and cephalopods are usually bought direct from foreign exporters.

The payment procedure for imported products follows standard international practices. Foreign exchange payments for imports are made (usually in US dollars) through a Letter of Credit (L/C) with any commercial bank. For transactions not exceeding Baht 500 000, government approval is not required and the application submitted to a bank must be accompanied by supporting documents, i.e. a sales contract, a packing list and an invoice. For transactions exceeding Baht 500 000, the application is submitted with a Bank of Thailand Import Declaration form together with the packing list. Quotations are in fob or C&F terms depending on the individual agreement between importer and exporter.

2.5 Retail Sector

Thailand's retail food sector continues to evolve with modern retailers such as hypermarkets, supermarkets, cash and carry, and convenience stores gaining market share while traditional retailers gradually declining. Modern food retailing accounts for approximately 70% of total retail sales as more local consumers have been diverted from wet markets and grocery stores to hypermarkets and supermarkets. This rapid growth of modern retailers has been driven by increasing investment from the leading international retail chains since 2000 such as hypermarket UK-based Tesco with its Tesco Lotus stores, Big C Supercenter of Casino Group of France, and cash and carry Netherlands-based Siam Makro.

The Max Valu supermarket chains are owned by the Japanese corporation AEON, while Tops and Home Fresh Mart are owned by the Thai group, Central Retail and The Mall Co., Ltd. Foodland Supermarket caters to local Thais, while Villa Market carries a wide range of imported goods and caters to foreigners, particularly Western expatriates. UFM Fuji supermarket caters to Japanese expatriates in Thailand and provides a wide range of imported Japanese products.

2.5.1 Hypermarket

The hypermarket segment has been the best performing retail sector as 90% of urban Thai shoppers go to hypermarkets at least once a week. At present, there are only two major hypermarkets in Thailand, which are Big C and Tesco Lotus. Big C's takeover of France based Carrefour Group in 2010, enabled it to expand its customer base in Bangkok and the provinces and subsequently turned it into the hypermarket with the most outlets in Thailand. These hypermarkets offer a wide range of fresh seafood and packaged seafood including giant squid imported from Peru. According to official data, the average Thai consumer spends about US$150 per month on retail products, of which 49% is spent on fresh foods. Both Big C and Tesco Lotus have also introduced a new store format called "Extra" which offers a greater range of premium products including a wide selection of imported seafood products targeting middle and high income customers.

2.5.2 Cash & Carry Store

Siam Makro, the first membership-based Cash & Carry retail store in Thailand was established in 1988 and registered under the name "Makro." At the end of 2011, 52 Makro stores of varying formats and sizes existed in Thailand with 9 stores located within the greater Bangkok area and 43 stores in the provinces.

2.5.3 Supermarket

The supermarket business in Thailand is driven by six major players, which are Central Food Retail (Central Food Hall and Tops Marketplace), The Mall Group (Home Fresh Mart and Gourmet Market), Foodland Supermarket, Villa Market, MaxValu Supermarket, and UFM Fuji. This highly competitive segment is concentrated in Bangkok where consumers with greater disposable income and more discerning customers reside. The supermarket sector tends to cater to medium and upper income consumers by offering a wide range of premium products and a broader assortment of local and imported processed food, fruits and vegetables, meat, seafood, and beverage products.

2.5.4 Convenience store

The convenience store sector is the fastest growing retail food sector with over 11,000 stores nationwide. It sells 15% of the total fast moving packaged consumer goods in Thailand. The leading player is 7-Eleven, which accounts for 53% of total convenience store sales and has 6,276 outlets making it the world's third largest 7-Eleven network after Japan and the United States. CP, the local operator of 7-Eleven, plans to open 500 new outlets a year in order to reach its goal of 7,000 outlets by 2013. Tesco has also aggressively expanded its network of smaller Lotus Express stores at gasoline stations and downtown areas with more than 750 locations across the country. The Central Retail Corporation, the operator of Tops Daily convenience store, established a joint venture with Family Mart in September 2012. The company plans to convert all of its Tops Daily stores to Family Mart Stores, which will subsequently increase the number of Family Mart outlets to 1,500 over the next five years. Aeon (Thailand) plans to expand their convenience store brand "Max ValuTanjai" nationwide with approximately 20 new outlets every year.

3 Offer Analysis

3.1 Domestic Production

As indicated before, Thailand's total fish production was around 3.0 million MT valued at approximately US$4.8-5.0 billion. Marine capture fisheries contributed around 52%, followed by coastal aquaculture (25%), freshwater aquaculture (16.5%) and inland capture fisheries (6.5%). The bulk of marine capture fisheries and freshwater fish are sold to the domestic market in live and fresh forms while significant amount go to processing industry. The bulk of production from coastal aquaculture, mainly of shrimp goes to processing industry for exports.

3.1.1 Major companies and products offering

As indicated above there are few hundreds modern seafood processing plants exist in Thailand producing variety of seafood products including value added and ready to eat products. The processing companies can be generally grouped into:

- Seafood canneries: canned tuna, sardines, mackerel and other seafood products like salmon spread, canned squid and cuttlefish, canned anchovy etc. Thai canneries produce variety of canned and also in pouch products sold to international, regional and also local markets. They produce different tastes from basic canned tuna in brine and in oil or in tomato sauce for mackerel and sardines to Asian recipes like *Tum Yam*, curry, teriyaki as well as tuna/salmon spread etc.

- Shrimp processors: vannamei shrimp is the main stream and small percentage use black tiger shrimp as raw materials. Great variety of shrimp products are produced mainly value added products such PTO, PD, breaded shrimp, Nobashi, sushi, consumer packed products etc.

- Frozen seafood processors: produce variety of raw material based products from fish, cephalopods and also surimi based products.

In addition to the production of their own brands, many companies as mentioned before also produces products under other companies' brands (OEM) including for supermarket brands in the US, Europe and also Japan.

Below Table 8 provide products and brands produced by Thai major seafood packers.

Table 8: PRODUCTS OFFERED BY MAJOR THAI SEAFOOD PACKERS

Nº	PACKERS	PRODUCTS	BRAND	MARKETS
1	**ANGLO-SIAM SEAFOODS LTD**	Frozen shrimp, cuttlefish, squid, octopus in various forms and other value-added seafood products	*A.S,.CRYSTAL, BLUE SEA*	Japan, EU, USA, Canada and other Asian countries, local
2	**ASIAN SEAFOODS COLDSTORAGE (SURATTHANI) CO.,LTD**	Cuttlefish, squid, soft cuttlefish, baby octopus, black tiger shrimp, vannamei shrimp	*ASP*	Japan, USA, Canada, EU, Australia, Korea, Taiwan, local
3	**ANDAMAN SEAFOOD CO.,LTD**	Frozen shrimps products, breaded shrimp, sushi, ready to eat meal, a prepared breaded crumb shrimps, fish	*AMS, ASIAN TEMPTATION, ROYAL THAI*	USA, Europe, Japan, Hong Kong, Korea
4	**ASIAN SEAFOODS COLDSTORAGE (SRIRACHA) CO., LTD**	Shrimp, fish, soft shell crab, value added seafood	*SHRIMPPAK*	USA, Canada, EU, Asia
5	**ASIAN SEAFOODS COLDSTORAGE PUBLIC CO.,LTD**	Frozen shrimp, frozen sillago fish	*TCC, SAKURA*	Japan, USA. Taiwan, Australia, China, Canada, local
6	**C.P.F. FOOD PRODUCTS CO.,LTD**	Frozen ready to eat meal	*THAI-THAI BRAND*	Europe, Japan, USA., Canada, Hong Kong, Asian countries
7	**CHAROEN POKPHAND FOODS PUBLIC CO.,LTD**	Frozen seafood products including ready to eat seafood	*CP BRAND*	Japan, USA., EU, Russia, Korea, Canada, Australia, local
8	**KINGFISHER HOLDINGS LIMITED**	Frozen seafood products	*THE CATCH OF KINGFISHER, SEA BREEZE, OCEANIC*	USA, EU, Japan, Australia
9	**I.S.A.VALUE CO.,LTD**	Tuna, sardine, mackerel in	*SUPER C CHEF,*	Asia, USA, EU, Middle

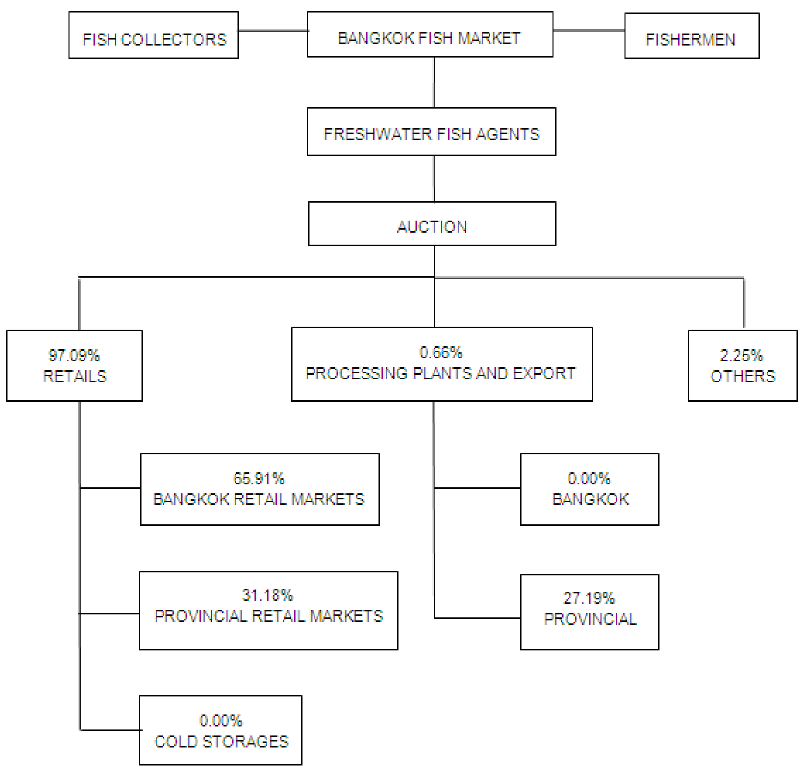
		canned, pouch, frozen loin	*BIG BLOW*	East etc.
10	**PACIFIC FISH PROCESSING CO.,LTD**	Frozen seafood (surimi) and varieties of processed seafood products made from high quality of surimi	*PFP*	Japan, Malaysia, Singapore, Taiwan, Hong Kong, UK, local
11	**NARONG SEAFOOD CO.,LTD**	Value added seafood products	*NARONG*	Japan, EU, USA, Korea
12	**PAN ASIA (1981) CO.,LTD**	Processed seafood: canned/bottled seafoods: crabmeat, shrimp,baby clams, squid	*PANASIA, PANSEA, SOUTH SEAS, SOUTH LAND ETC*	USA, Canada, EU, Russia, Hong Kong, Taiwan, local
13	**SEA HORSE PUBLIC CO.,LTD**	Frozen and canned seafood products	*FIVE ELEPHANTS, OCEAN CRYSAL,SEA CRYSTAL, CASSFOOD*	France, Italy, Japan, Taiwan, Malaysia, Singapore, local
14	**PAKFOOD PUBLIC CO.,LTD**	Frozen shrimp, dim sum, canned crab meat, value added product, pasteurized crab meat, fingers foods	*BLUE SKY, TYC-TIME*	USA, Japan, Europe and others
15	**S.K.FOODS (THAILAND) PUBLIC CO.,LTD**	Tuna & salmon, (canned/ products and frozen (steaks,fillets)	-	Japan, Australia, UK, Netherlands, Canada
16	**SIAM CANADIAN FOODS CO.,LTD**	Frozen seafoods, (shrimp,squid/cuttlefish, fish, surimi,etc)	*FLYING FISH, SIAMESE PEARL AND PEARL OF SIAM*	USA, Canada, Europe, Middle East and Asia
17	**SURAPON FOODS PUBLIC CO.,LTD**	Frozen ready to eat and ready to cook seafood product	*SSF AND SURAPON FOODS*	Japan, Australia, Europe,
18	**SIAM MARINE PRODUCTS CO.,LTD**	Frozen cuttlefish, octopus, squid	*SMP*	USA, Europe, Korea, Australia etc
19	**TEPPITAK SEAFOOD CO.,LTD**	Frozen squid, cuttlefish,octopus, soft cuttlefish and frozen fish products such as red mullet, barramundi	*EAGLE, SEA KING, SEA STAR, SEA FLOWER*	Italy, Japan, Singapore and other Asian countries local
20	**THAI UNION FROZEN PRODUCTS PUBLIC COMPANY LIMITED**	Frozen seafoods, snack foods, ambient stable hermetically sealed products	*FISHO, CHICKEN OF THE SEA, SEALECT*	USA, Japan, EU, South Africa, Canada, Australia, local
21	**THE UNION FROZEN PRODUCTS CO.,LTD**	Shrimp, fish, frozen seafood, squid, seafood mix, valued added	*PRANTALAY, UFP*	USA, Canada, EU, Japan, Australia
22	**SURATTHANI MARINE PRODUCTS CO.,LTD**	Shrimp products	*SRT, SMP*	Japan, USA, Europe, local
23	**THAILAND FISHERY COLD STORAGE PUBLIC CO.,LTD**	Frozen black tiger shrimp, frozen vannamei white shrimp	*SPK, NEW SOUTHERN*	USA, Japan, Europe
24	**THE SIAM UNION FROZEN FOODS CO.,LTD**	Fresh raw shrimp, cooked shrimp, value added product	*SUF*	USA, Japan, South Korea, China, Russia, Italy
25	**TROPICAL CANNING (THAILAND) PUBLIC CO.,LTD**	Canned and pouch tuna, salmon, sardines, mackeral, clams, petfood and value added	*TCB, TC BOY, SAFCOL*	USA, Australia, Canada, Egypt, South Africa, local

The Ministry of Agriculture and Cooperatives (MOAC) Thailand has launched a quality label called "Q-mark" for certified agriculture commodities including seafood products. Q mark represents high quality products and assures safety for consumption. The Q mark is also being promoted internationally.

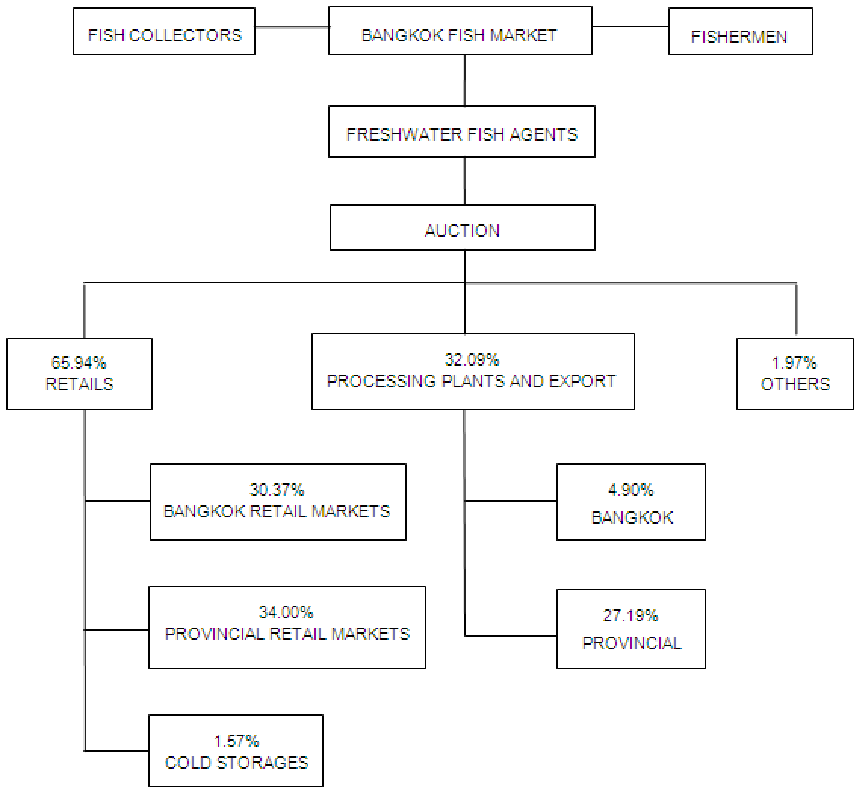
3.1.2. Local sales

As mentioned before Thai consumers still prefer fresh fish over frozen and other processed products. Modern retail outlets like supermarkets and hypermarkets normally also have large areas for selling fresh/chilled fish products. The following graphs are distribution channels for marine capture fisheries and freshwater fish in Bangkok area.

Distribution channel of fresh marine fish at Bangkok Fish Market



Distribution channel of fresh water fish at Bangkok Fish Market



In addition to fresh fish there is also increasing number of prepared/preserved and valued added products being sold in the local markets mainly through supermarket, hypermarket and convenience stores. These products are mainly locally produced and some of the dominant brands are Sealect, Three Lady Cooks, CP, Ayam brand, Nautilus, Roza and also supermarket brands like Lotus Tesco and Big-C brands.

3.1.3 Exports

Thailand exported more than 1.9 million MT of fish and fishery products worth Baht264.4 billion (US$8.8 billion) in 2012. Seafood exports were on the declining trends in volume for the past three years but increased in value terms which reflected increasing prices for seafood products in the global market and also indicated that more and more value added products were exported by Thai seafood industry. Shrimp and canned tuna were the main products exported both in terms of volume and also in value making Thailand as the largest producer and exporters of these two products. In 2012, Thailand exported 348

389 MT of shrimp (all categories) worth Baht 95.4 billion (US$3.2 billion), while canned tuna exports were recorded at 548 667 MT valued at Baht 80.8 billion (US$2.7 billion). These two products contributed around 47% of the total volume and 66.6% of the total value exports in 2012.

Canned sardines and other canned fish are the next most important products exported by Thailand, followed by fresh and frozen fish, canned pet food, and cephalopods.

Thailand 9: Exports of Fishery Products 2010-2012
(Q = MT, Value: Baht Million)

	2010		2011		2012	
Main Products	**MT**	**Baht Million**	**MT**	**Baht Million**	**MT**	**Baht Million**
Fresh, chilled and frozen shrimp	241 729	53 077	201 756	52 314	185 634	46 012
Dried shrimp	315	74	254	72	448	146
Boiled or steamed shrimp	641	99	1 467	384	232	70
Canned shrimp	11 663	2 818	6 214	1 949	821	368
Prepared and preserved shrimp	165 598	43 469	178 763	54 624	161 254	48 770
Fresh, chilled and frozen cephalopods	68 610	11 116	62 568	12 286	61 870	12 842
Dried cephalopods	398	292	383	245	368	277
Prepared and preserved cephalopods	4 630	982	4324	890	7 496	1 543
Smoked cephalopods	-	-	-	-	22	5
Fresh and frozen fish (whole)	22 9032	6 756	210 958	7 151	208 842	7 414
Fresh and frozen fish, fillet and minced	96 444	12 526	93 436	12 399	84 184	12 875
Dried fish	63 081	2 166	68 278	2 706	74 747	3 589
Live fish	10 548	988	8 877	1 098	8 434	1 262
Canned tuna	535 480	53 172	535 490	63 205	548 667	80 805
Canned sardine	68 937	4 589	69 720	4 840	110 541	8 511
Other canned fish	45 341	4 315	514 089	5 136	53 202	6 411
Canned crab	3 972	1 671	3 164	1 600	2 963	1 470
Other canned seafood	37 032	3 349	36 635	3 417	29 529	2 865
Canned pet food	69 885	5 223	69 488	5 601	70 571	6 867
Prepared and preserved seafood	64 713	8 798	69 409	9 864	54 043	7 130
Prepared and preserved tuna	53 247	6 257	40 908	6 124	10 826	1 793
Other prepared and preserved crab	1 974	673	1 295	443	1 182	289
Other fishery products	285 084	14 492	260 471	13 517	232 223	13 134
Grand Total	**2 058 354**	**236 902**	**1 974 965**	**259 864**	**1 908 099**	**264 449**

Source: Department of Fisheries, Thailand.

Thailand exported its fishery products to more than 200 countries and territories. Japan is the number one market for Thai seafood exports followed by USA, Australia, UK, other European countries and Middle East markets. With the declining demand in the US, Japan and also Europe for the past few years, Thailand is now targeting ASEAN, Africa and also Latin American markets to increase its exports.

Fishery exports under HS 03 declined in 2012 to around US$2.82 billion from over US$3.0 billion in the previous year. Under this category Japan was the number one destination followed by the US, Italy and China. Exports to regional markets like to China, Vietnam, Malaysia, Hong Kong, Singapore grew positively while to traditional markets like Japan and the US declined.

Table 10: Thailand's exports of live, fresh, frozen and dried/salted products (HS03)

Destination	2010		2011		2012	
	MT	US$1 000	MT	US$1 000	MT	US$1 000
Japan	138 480	819 572	142 267	934 918	129 585	919 870
United States	122 015	853 210	97 924	802 125	76 691	608 066
Italy	29 770	121 608	28 085	140 276	25 267	126 078
China	85 282	121 956	64 225	107 047	66 830	125 661
Canada	14 984	103 686	15 123	124 568	14 005	115 990
Vietnam	24 764	60 054	33 120	81 562	51 309	115 468
Korea South	17 814	71 963	18 898	95 461	19 799	98 616
United Kingdom	10 162	69 199	10 843	90 317	10 896	87 419
Malaysia	100 967	40 254	105 266	49 898	111 466	76 995
Australia	8 295	54 077	7 534	57 551	7 755	65 850
Hong Kong	14 695	54 134	14 945	57 125	14 165	64 338
Taiwan	20 608	53 716	16 181	59 949	17 033	55 214
Germany	6 877	45 850	5 684	45 838	5 682	46 217
France	10 457	50 370	7 467	47 354	5 345	36 647
Sri Lanka	25 218	30 940	23 601	32 939	19 791	32 750
Singapore	16 349	26 886	15 846	27 923	17 279	29 941
Spain	13 350	65 385	11 078	58 754	6 087	27 876
Russia	4 820	19 308	4 569	24 046	5 176	27 809
Belgium	7 324	41 709	6 051	44 919	3 223	22 239
Total (Incl.others)	**747 585**	**2 867 777**	**681 698**	**3 022 598**	**655 830**	**2 823 486**

Meanwhile, exports of prepared and preserved products (HS16) which include also value added ready to eat/cook products increased to almost US$7.5 billion in 2012 from US$7.1 billion in the previous year. Japan was the number destination for these category followed by the US, UK and Australia. Exports to Japan increased last year while to the US and UK significantly declined.

Table 11: Thailand's exports of prepared/preserved seafood products (HS16)						
Partner Country	**2010**		**2011**		**2012**	
	MT	**US$1 000**	**MT**	**US$1 000**	**MT**	**US$1 000**
Japan	294 333	1 512 501	325 215	1 901 996	347 219	2 113 953
United States	265 971	1 399 426	247 222	1 632 844	205 981	1 361 764
United Kingdom	169 523	687 127	176 650	796 339	168 476	765 500
Australia	59 038	254 353	59 553	304 936	60 951	349 390
Canada	45 613	220 138	47 066	275 394	44 940	293 960
Egypt	54 565	119 950	49 450	139 940	60 790	216 610
Netherlands	46 638	187 182	44 886	210 183	40 385	178 414
South Africa	39 452	93 465	33 199	82 509	64 070	176 937
Germany	30 030	161 222	26 906	159 113	32 232	173 318
Libya	24 268	69 972	15 515	55 473	37 552	169 065
Saudi Arabia	19 982	60 853	21 746	85 269	29 086	137 908
Korea South	15 835	58 308	20 540	79 838	21 200	85 856
France	19 437	91 504	19 862	109 079	15 456	85 821
Singapore	18 850	67 782	20 101	82 403	20 148	85 741
Italy	15919	66 804	13 351	66 698	13 261	67 203
United Arab Emirates	9228	28 120	12 865	49 555	14 498	64 498
Hong Kong	14 036	49 844	12 191	53 099	12 410	59 307
New Zealand	9 368	36 943	8 256	37 864	8 973	45 587
Yemen	7 971	20 576	8 426	29 100	11 020	43 865
Total (Incl.others)	**1 443 720**	**5 986 266**	**1 470 113**	**7 160 961**	**1 484 639**	**7 475 977**

3.2 Imports

Imports of fishery products into Thailand have been on the increasing trends as the domestic production particularly from wild caught sector declined and at the same time demand both from local consumers and also from the processing sector are on the rise. Imports almost reached 1.7 million MT worth Baht100 billion (US$3.3 billion) in 2012, making Thailand one of the largest seafood importers in Asia behind Japan and China. The bulk of the imports were fresh and frozen tuna mainly for canning and other fresh/frozen whole fish. Imports of these two commodity groups took more than 85% of the total imports quantity last year. The rest of the imports were cephalopods mainly frozen squid, prepared/preserved seafood and shrimp.

Table 12: Imports of Fishery Products 2010-2012 (Q = MT, Value: Baht Million)						
	2010		2011		2012	
Main Products	**MT**	**Baht Million**	**MT**	**Baht Million**	**MT**	**Baht Million**
Fresh, chilled and frozen shrimp	8 305	1 335	6 723	1 257	9 687	2 111
Dried shrimp	4 209	41	6 653	54	4 450	51
Boiled or steamed shrimp	4 156	28	7 156	49	4 748	33
Canned shrimp	15	7	5	1	103	16
Prepared and preserved shrimp	641	168	498	98	871	226
Fresh, chilled and frozen cephalopods	62 752	3 767	66 778	4 479	77 422	5 045
Dried cephalopods	5 662	690	6 115	913	6 438	1 223
Prepared and preserved cephalopods	194	31	232	46	837	229
Smoked cephalopods	-	-	-	-	-	-
Fresh and frozen fish (whole)	574 946	18 982	659 344	23 485	695 445	25 073
Fresh and frozen fish, fillet and minced	20 609	2 273	27 438	2 752	30 408	2 853
Dried fish	3 292	136	3 432	135	3 775	173
Live fish	898	87	1 246	105	902	112
Fresh, chilled and frozen tuna	831 008	36 371	787 089	43 226	728 367	51 623
Other canned seafood	8 413	872	18 530	1 856	20 525	2 537
Canned pet food	66	24	30	7	111	9
Prepared and preserved seafood	15 488	1 410	25 841	2 565	25 104	3 246
Fresh, chilled and frozen cockle	12 633	120	12 092	146	7 118	88
Fish meal	6 652	229	11 063	347	14 760	410
Other fisheries products	26 380	2 653	29 804	3 454	34 628	4 982
Grand Total	**1 586 319**	**69 225**	**1 670 068**	**84 976**	**1 665 698**	**100 037**

Source: Department of Fisheries, Thailand.

As indicated before that almost all imported tuna and shrimp and significant proportions of imported frozen fish particularly sardines and mackerels as well as frozen cephalopods are mainly used as raw material for re-processing. Therefore it can be said that the bulk of the imports (80-90%) are being used as raw material for re-processing. Taiwan, China, Indonesia, USA, Japan and South Korea are the main suppliers of fresh, frozen and dried fish products (HS03) with tuna being the main product under this category.

Peru is one of the main top 30 suppliers of frozen seafood product mainly frozen squid (giant squid). Imports from Peru (HS03) have tremendously increased from around 10500 MT in 2010 to more than 29000 MT in 2012, up by 178% during the period.

Table 13: Imports of fresh, frozen and dried fish products (HS03)						
Partner Country	2010		2011		2012	
	MT	US$1 000	MT	US$1 000	MT	US$1 000
Taiwan	221 402	298 831	158 591	286 408	159 752	378 000
United States	149 886	210 221	148 564	274 095	127 091	264 000
Indonesia	205 864	141 092	184 697	133 679	214 434	202 000
Japan	91 406	161 472	95 848	168 276	104 019	201 000
Korea South	96 750	122 445	89 178	170 973	90 762	198 000
China	47 216	62 534	114 327	137 982	120 241	172 000
Vanuatu	102 385	132 996	72 866	127 865	70 796	162 000
Norway	16 804	92 719	19 175	105 558	24 303	108 000
India	72 781	95 031	77 037	107 753	61 814	106 000
Vietnam	19 999	53 719	28 043	81 739	34 960	104 000
Chile	12 178	65 000	19 665	111 306	21 184	100 000
Marshall Islands	31 589	38 896	54 765	91 641	37 071	816 880
Philippines	19 286	30 222	35 181	65 204	33 961	77 975
Papua New Guinea	35 580	32 648	68 532	53 235	88 152	74 216
Myanmar	134 189	66 665	101 520	61 682	71 657	46 278
Micronesia	17 778	22 310	18 393	29 263	20 986	451 223
Russia	4 350	20 713	12 086	45 637	11 519	43 292
Kiribati	7 207	9 951	15 023	25 538	16 404	36 018
Maldives	16 087	20 778	21 877	40 476	14 752	35 842
Canada	7 875	24 506	4 338	18 790	8 498	33 129
Mexico	5 695	4 739	18 660	18 701	30 391	31 720
Peru	10 533	10 645	17 695	235 492	29 280	31 584
Total (incl. Others)	**1 535 077**	**2 049 000**	**1 592 194**	**2 554 000**	**1 579 692**	**2 900 000**

Source of Data: Thai Customs Department

Table 14: Thai imports of fishery products from Peru							
HS	Description	2010		2011		2012	
		Quantity	US$1 000	Quantity	US$1000	Quantity	US$1000
0307	Molluscs (squid, cuttlefish etc)	10197	10404	17018	22934	29123	30003
0303	Frozen fish	7	10	655	580	115	1100
0305	Fish dried, salted, smoked	11	446	0	0	41	475
0301	Live fish	4	14317	4	16	1	6
0302	Fresh fish	314	173	18	19	0	0
1605	Molluscs, prepared/preserved	52	634	0	0	26	36
1604	Fish prepared/preserved	0	0	0	0	0	0
230120	Fish meals	983	1423	1216	2223	1338	2802
Total		**11 568**	**12 132**	**18 911**	**25 773**	**30 644**	**34 422**

Imports of prepared and preserved products (HS16) were relatively small quantity just over 50 000 MT mainly from its neighbors such as China, Vietnam and Indonesia. The bulk of the products imported were pre-cooked tuna loins for canning and dried/salted products.

Table 15: Imports of prepared and preserved fishery products (HS16)						
Origins	2010		2011		2012	
	MT	US$1 000	MT	US$1 000	MT	US$1 000
China	7 530	26 623	14 804	64 995	15 882	77 734
Indonesia	7 732	11 283	13 626	20 416	13 712	40 531
Vietnam	3 959	12 192	9 082	22 572	9 941	30 348
Thailand	2 433	11 821	4 088	16 129	4 157	20 883
Philippines	69	409	92	561	2 111	13 102
Malaysia	854	3 243	1 063	4 186	957	4 069
Japan	104	1 222	206	2 596	415	3 708
United States	257	1 139	294	1589	505	3 419
Italy	121	918	163	1 266	233	1 884
New Zealand	15	133	66	416	242	1 415
Taiwan	98	654	88	636	209	1 334
India	122	413	227	766	513	1 086
France	44	499	44	593	72	924
Australia	18	170	67	1 038	57	792
Korea South	469	306	469	524	594	560
Fiji	0	0	666	4 161	86	558
Chile	86	220	78	146	151	533
Spain	30	280	30	401	38	444
Argentina	80	306	66	330	65	341
Papua New Guinea	820	2 325	269	1 447	43	243
Denmark	18	91	30	138	46	242
Singapore	13	135	15	193	21	230
Peru	52	63	0	169	26	36
Total (incl. others)	**25 200**	**75 604**	**45 843**	**146 911**	**50 608**	**208 020**

Source of Data: Thai Customs Department

4 Market access

4.1 General tariff measures

Generally, import duties for fishery products entering Thailand are applied at different rates ranging from 5% up to 30%. Current normal import duty rates (based rate) for fisheries products are as follows (based on Harmonized System/HS codes):

Table 16: Base Rate Import tariffs for Fishery Products in Thailand

HS Code	Commodity group	Base rate ad valorem (%)
03.01	Live fish	30
03.02	Fresh, chilled fish	5 - 30
03.03	Frozen fish	5 - 30
03.05	Dried, salted, smoked fish	5 - 30
03.06	Crustacean	5
03.07	Molluscs	5 - 30
16.04	Prepared/preserved fish	20

The above rates are reduced by up to 0% for countries which have signed bilateral free trade agreement (FTA) with Thailand as well as under the regional ASEAN Free Trade Area (AFTA). Thailand is one of the most active countries in the region which has signed FTA with many countries including with Peru. In addition fishery products imported as raw material for re-export also enjoy zero tariff regardless of the origins. All fisheries products caught in international waters by Thai fishing vessels under joint agreements are also exempted from import duty. Quota restrictions do not apply in the importation of fishery products into Thailand.

4.2 Tariff preferences for Peruvian fish products

The Free Trade Agreement (FTA) negotiations between Peru and Thailand were finally concluded recently during the Peruvian President's visit to Thailand in early October 2013. The FTA negotiations between both countries started in 2004. Following the first negotiation the first Protocol was signed in 2005which provided 50% of each country's exports benefiting from duty free treatment, whilst 20% of these products were phased out over a 5 year period. Trade facilitation was also included in the Protocol with the aim of enhancing cooperation and improving transparency relating to sanitary and phytosanitary measures, standards and conformance and custom procedures. Since then the bilateral trade between both countries have grown rapidly an average pace of 43.6% per annum, according to Thai official data.

Second additional Protocol between both countries to accelerate the Liberalization of Trade in Goods and Trade Facilitation was singed on 13 November 2009. Third additional Protocol was also signed in November 2010. Following these series of agreements, the Early Harvest programme under the FTA took effect on Dec 31, 2011, covering 70% of goods traded between the two countries. Under the scheme, tariffs on 50% of all goods have zero duty while 20% of the goods would be exempted from duty from 1 January 2016.

On fishery products imported from Peru, most of them have already enjoyed zero tariffs like frozen squid, scallops and also fish oil. The following is summary of major Peruvian seafood products exported to Thailand and their tariffs reduction schedule up to 2016(%) which shows that most of the products are already enjoying zero tariffs and only shrimp face 10% import duty. However, this duty is exempted if the shrimp is used for re-processing and re-export.

Table 17: Imports tariffs reduction schedule for Peruvian Seafood

HS	Product	2012	2013	2014	2015	2016
03035300	Frozen sardine	0	0	0	0	0
03035400	Frozen mackerel	0	0	0	0	0
03061720	Frozen shrimp	13.33	10.0	6.67	3.33	0
03072910	Frozen scallop	0	0	0	0	0
03074910	Frozen squid	0	0	0	0	0

The full list of tariffs schedule for Peruvian seafood products entering Thailand is attached (**Attachment 1**).

4.3. Regulations and certifications

According to the Custom Act, all products entering Thailand, except for transhipment or transit, are subject to customs examination. Customs entry forms must be submitted, together with original or duplicate shipping documents, to the Import Inspection Division of the Customs Department or the Customs office at the entry point. Normally the duty would have been paid for all entries before the goods are examined by customs. The customs authorities may, at their discretion, permit a provisional entry under certain conditions. The following documents are required for imports: Import Entry Form; Commercial Invoice; Proforma Invoice; Packing List; Bill of Lading/Airwaybill; Import Licence; Certificate of Origin; and Import Declaration (of the Bank of Thailand) for imports exceeding Baht 500 000.

For importation of fishery products, a certificate for duty exemption, where applicable, is required. In most cases, a Health (Quality) Certificate issued by the competent authority in the country of origin is also required by the Food and Drug Administration, Ministry of Health. As most fish products enter Thailand as raw materials for further processing and re-export, quality inspection procedures by government inspection agencies is usually minimal and quality inspection is often left to individual importers (processors).

In general, importing companies set up their own standards to meet basic requirements for raw material such as freshness and other physical (sensory) requirements. Indirect inspection is done by the Fish Inspection Division when they conduct factory inspections ensure that HACCP requirements are complied with. This is in contrast to export procedures where quality inspection is fully taken care of by the Fish Inspection Division of the Department of Fisheries.

The followings are common procedure for importation of aquatic animals into Thailand:

a. Importation of fish and fishery products into Thailand is based on the following regulations: Fisheries Act, B.E. 2490 (1947); Animal Epidemic Act, B.E. 2499 (1956); Food Act, B.E. 2522 (1979); Wildlife Preservation and Protection Act, B.E. 2535 (1992); other related Acts.

b. Pre import: Importer in Thailand should apply for the Import Permit (prior to an importation) from Fish Inspection Office (FIO) or provincial fishery office (authorized as FIO) at the port of entry together with the following documents:

- Form No.1/1
- In case of wild aquatic animals, import permit as stated in Wildlife preservation and Protection Act B.E. 2535 is needed.
- Copy of regular or official identification card
- Copy of residential registration book (ordinary person)

- Approved document of company registration
- Document of authorization, copy of identification card, official ID card of the assignor and assignee (in case of importer's representative)
- Copy of permit for aquatic animal trading (ฮ.6) in case of the importer is doing the trading business of aquatic animals
- Copy of health quarantine or and health certificate issued by authorized agency from the original country (this can be shown in advance)
- For shrimp, health certificate must be available issued by approved agency in the country of origin. This document must indicate the residue-free of these substances:
  - chloramphenicol (detection limit of analysis method must not be higher than 0.3 ppb)
  - Nitrofurans (analyzed by LC MS MS with detection limit not higher than 0.3 ppb)
- In case of importing product for re-processing/re-exporting purpose, site of culture or stocking purpose must be stated
- Other documents as required

The above documents must be presented at least 7 days in advance. After the request has been approved, the importer must confirm the details for the shipment i.e. date of arrival, time, flight, vessel number or other transportation mode one day before the arrival of the products. If the request has been denied as considered by authorized officers, the applicant will be informed as soon as possible.

c. The date of import

Importer must show all the required documents to the FIO Officer or fishery officer from the provincial office at the site of import. The documents are as follows:

- Import permit
- Approving document for importing live or dead animals into the kingdom (Form No 6)
- Request form for food import (in case of food products)
- Import permit of wild aquatic animals as required by Wildlife Preservation and Protection Act B.E. 2535 (1992) (for wild aquatic

animals and issued by Fisheries permission and Management Section, Fisheries Administration and Management Bureau)

- Export Permit for wild aquatic animals as regulated by CITES (original copy is required) from the exporting country (for wild animals under lists of CITES)
- Import Certificate for yellow-fin tuna from Department of Fisheries (in case of yellow-fin tuna). The purpose is to protect the harmful to dolphins catch by using purse seine net in the eastern tropical Pacific Ocean
- Health certificate or approved health document (original copy) issued from the competent authority in country of region.
- For shrimp import: There is a requirement for the original copy of health certificate from the approved agency in the original country stating the residue-free of the following substances:
  - Chloramphenicol (Analysis method with detection limit not higher than 0.3 ppb)
  - Nitrofurans (Analyzed by LC MS MS with detection limit not higher than 0.3 ppb)
- In case of food manufacturer, copy of Food Production Permit from the Ministry of Public Health is required (only for the first application)
- In case of food manufacturer, copy of import permit or order permit of food into the kingdom from the Ministry of Public Health is required (only for the first application)
- Copy of factory permit from the Ministry of Industry (if available, only for the first application)
- Transportation permit for imports (if available)
- Invoice (if available)
- Air Waybill or Bill of Lading (if available)
- Packing list (if available)
- Other documents as required

d. Inspection:

Officials inspect the completeness of the documents and aquatic animals and proceed as follows:

Live aquatic animals

- After the required documents have been completed and other requirements have been fulfilled by the importer, officials will sample the aquatic animals for disease inspections before the import permit is issued

- If the documents are not completed and other requirements have not been fulfilled by the importer and there are some suspicions, officials will sample the aquatic animals for quarantine. Some certain laboratory analyses will be performed to ensure that the quality of the imports reach standard level before the import permit is issued. If the quality does not meet the standard level, legal action will be implied and the aquatic animals will be deported back to the exporting country or destroyed.

Dead or raw products

- After the required documents have been completed and other requirements have been fulfilled by the importer, officials will sample the imported products for residual surveillance before issuing the import permit.

- Species, size and amount of imported animals must be the same as specified in the import permit or not over or more than as permitted. Import permit or permit document for each application can be used only once. Process and cost of withholding for quarantine or other required inspections of imported aquatic animals or products will be the responsibility of the importer.

e If the documents are not completed and other requirements have not been fulfilled by the importer and there are some suspicions, officials will sample and withhold the product for further inspection. Some certain laboratory analyses will be performed to ensure that the quality of the imports reach standard level before the import permit is issued. If the quality does not meet the standard level, legal action will be implied and the aquatic animals will be deported back to the exporting country or destroyed (**Attachment 2** is the graph showing import procedure into Thailand).

5 Important Contacts

A. Government agencies and Seafood Associations

1. Directorate General of Food and Drug Administration
Ministry of Health
Mr. Chanchai Uerchaikul
Director of Import and Export Inspection Bureau
Tel: 66-2590- 7315
Fax: 66-2591-8477
E-mail: chanchai@fda.moph.go.th

   Mr. Praphon Angtrakool
Head of Import and Export Inspection Division
Tel: 66-2590-7348
Fax: 66-2590-7351
E-mail: prakool@fda.moph.go.th

2. Mr. Montri Klitsaneephaiboon
Director
Fish Inspection and Quality Control Division
Department of Fisheries Kasetsart University Campus
Paholyothin Road, Chatuchak
Bangkok 10900 Thailand
Tel: 66 2 5798078, 5620552, 5796915, 5620552
Fax: 66 2 5796687, 5620553

   Ms. Sirilak Suwanrangsi
Chief, Fish Inspection Center (Bangkok) :
Fish Inspection Center (Bangkok)
Fish Inspection and Quality Control Division
Department of Fisheries Kasetsart University Campus
Paholyothin Road, Chatuchak
Bangkok 10900 Thailand
Tel. 66 2 5798078, 5620552, 5796915, 5620552
Fax. 66 2 5796687, 5620553
E mail: sirilaks@ksc7.th.com

3. Ms. Srirat Rastapana
Director General of the Department of Trade Negotiation, Thailand
44/100 Nonthaburi 1 Rd., AmphurMuang, Nonthaburi 11000
Tel. 662-507-7555
Fax. 662-2547-5650
E-mail : sriratr@dtn.go.th

4. The Customs Department

1 Sunthornkosa Road, KlongToey
Bangkok, 10110
Thailand
Tel: 662 667 6000, 662 667 7000
Fax: 662 667 7767
Costumer Service
Tel: 662-2667-7002/662-2667-7716
Fax: 662-2671-5250
E-mail Address: ctc@customs.go.th

5. Thai Frozen Foods Association
92/6 6th Floor Sathorn Thani II,
North Sathorn Rd., Bangrak, Bangkok 10500 Thailand
Tel : (662) 235-5622-4, 636 9001-4
Fax : (662) 235-5625
www.thai-frozen.or.th
E-mail : thai-frozen@thai-frozen.or.th
President: Dr. Poj Arawattananont

6. Thai Tuna Industry Association
170/19, 8thFl, Ocean Tower 1 Bldg
New Ratchadapisek Rd, Klogtoey
Bangkok 10110, Thailand
Tel: 662-6628992/3
Fax:662-6618994
Ms. Supatra Rewpairoj
Executive Director
Email:supatra@thaituna.org

7. The Federation of Thai Industries
Queen Sirikit National Convention Center
Zone C. 4th Floor, 60 New Rachadapisek Rd
Klongtoey, Bangkok 10110, Thailand
Miss. Chayanin Kaewharn
International Organization Officer, International Organizations Department
Tel: +66 (0)2 345 1134
Fax: +66 (0)2 345 1139
E-mail: chayanink@off.fti.or.th

B. THAI SEAFOOD IMPORTERS as attached (Attachment 3).

ATTACHMENT 1

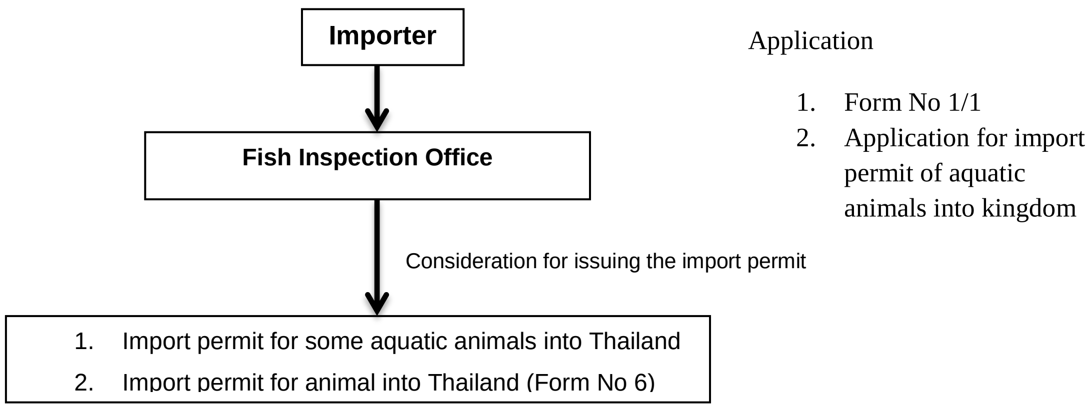
Import Tariff Reduction Schedule for Imported Peruvian Fish and Fishery Products into Thailand						
		Tariff Rate (%)				
HS	**Commodity**	**2012**	**2013**	**2014**	**2015**	**2016**
0301	Live fish	20	15	10	5	0
0302	Fish/dried (whole)	5	3.75	2.50	1.25	0
except						
0302.22.00	Plaice	20	15	10	5	0
0302.81.00		20	15	10	5	0
0302.53.00		20	15	10	5	0
0303	Frozen fish (whole)	5	3.25	2.50	1.5	0
except						
0303.32.00	Plaice	20	15	10	5	0
0303.41.00)		0	0	0	0	0
⋮	Tunas					
0303.49.00)						
0303.51.00)		5	3.75	2.50	1.25	0
0303.53.00		0	0	0	0	0
0303.66.00		20	15	10	5	0
0305	Dried, salted, smoked	5	3.75	2.50	1.25	0
except						
0305.71.00		20	15	10	5	0
0305.72.10		0	0	0	0	0
0306	Crustaceans	5	3.75	2.50	1.25	0
except						
0306.14.00.31	Crab	13.33	10	6.67	3.33	0
0306.14.10.66		0	0	0	0	0
0306.15.00.31		13.33	10	6.67	3.33	0
0306.21.10	Lobster	0	0	0	0	0
0306.22.10		0	0	0	0	0
0307	Molluscs	5	3.75	2.50	1.25	0
except						
0307.21.10)		exempted				
0307.29.10)	Scallop live fresh chilled Mussel	exempted				
0307.41.10)	Cuttlefish, squid	exempted				
0307.59.10)		exempted				
1604	Prepared/preserved fish	13.33	10	6.67	3.33	0
1604.13.11	Sardine	20	15	10	5	0
1605	Crustaceans	13.33	10	6.67	3.33	0

Source: The Department of Fisheries, Thailand.

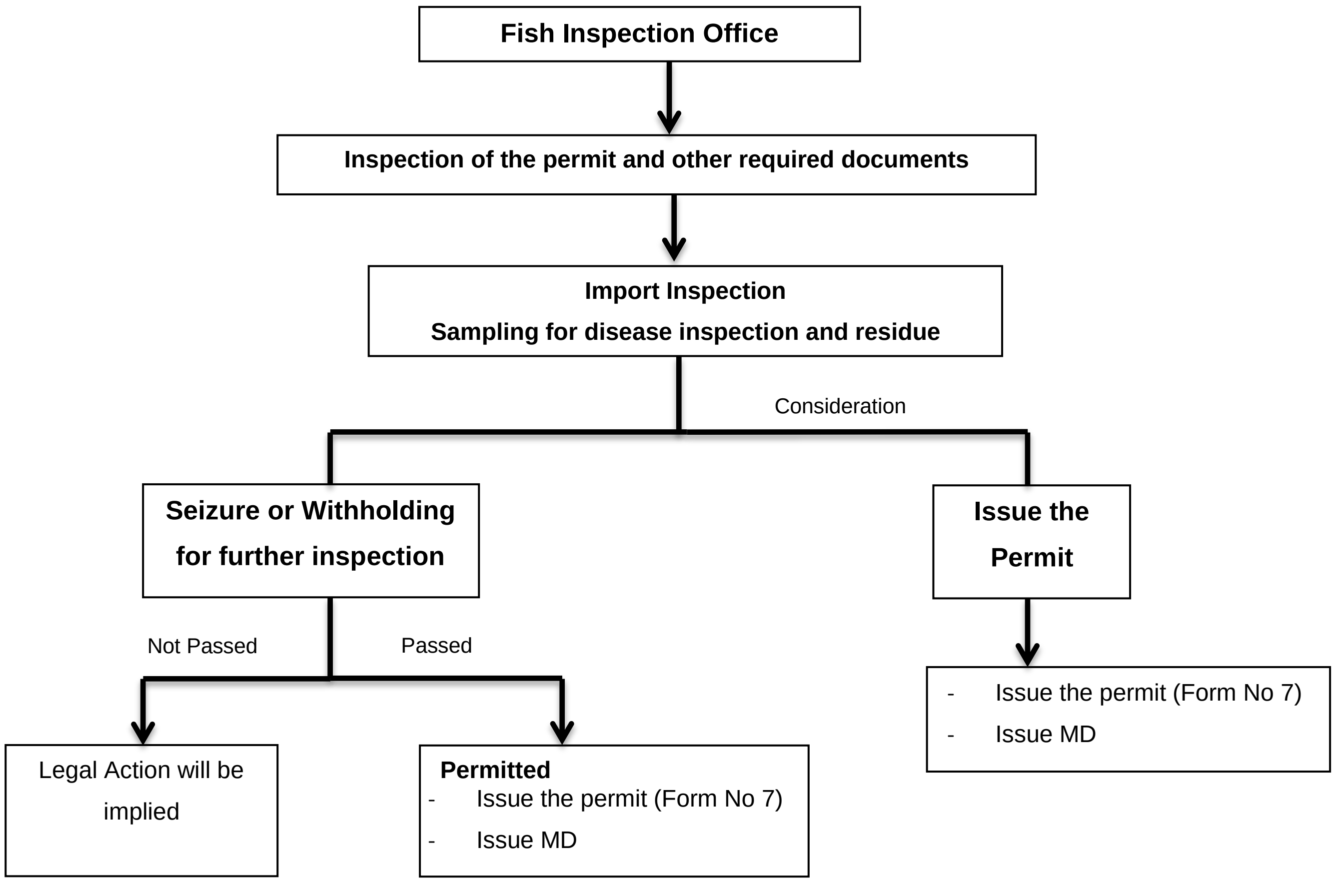
ATTACHMENT 2

Procedures for the Import of Aquatic Animals into Thailand

Pre – Import



Date of Import



Note: Importer of wild aquatic animals must apply for the permit at License and Fisheries Management Section, Fisheries Administration and Management Bureau, Department of Fisheries before these procedures

ATTACHMENT 3

SEAFOOD EXPORTERS/IMPORTERS FROM THAILAND

ALBATROSS COMPANY LIMITED
187/64-65 Ladprad 122 Lardprao
Wangthonglang
Bangkok 10310
Thailand
Attn: Mr. Khun Perm
Tel: 66-2-9340061-4
Fax: 66-2-9340065
E-mail: permphan@khunperm.com
Importer
Products: Crab, live

ANGLO-SIAM SEAFOODS LTD
191/47 CTI Tower 20th Floor
Ratchadapisek Road
Klong Toey, Bangkok 10110
Thailand
Attn: Mr. Kevin Taibanchakit
Tel: 66-2-2611163-8
Fax: 66-2-2611169
E-mail: anglos@loxinfo.co.th
Importer- Exporter - Processor
Products: Bivalve, live/fresh/frozen - Cephalopods, fresh/frozen - Fish, frozen - Shrimp, frozen

APIRACHAI FISHERY CO LTD
59/5 Moo 8, Rama 2 Road
Tumbon Thasai, Muang
Samutsakorn 74000
Thailand
Attn: Mr. Aphisit Techanitisawad
Tel: 66-34-417338
Fax: 66-34-413618
E-mail: aphisit@yahoo.com
Web: www.anusorn.co.th
Importer- Exporter - Processor
Products: Fish, fresh/chilled - Fish, frozen

B.S.A FOOD PRODUCTS CO LTD
1/41 Moo 3, Taiban Road, A. Muang
Samutprakarn 10280
Thauland
Attn: Mr. Sompod Uamploy
Tel: 66-34-820273 / 66-34-428205-6
Fax: 66-34-820559
E-mail: export@bsfood.com
Web: www.bsafood.com
Importer- Exporter - Processor
Products: Fish, frozen - Freshwater fish, fresh/frozen

BANGKOK FISHERIES CO., LTD
61/1 Thammakunakorn Road
Krokkrak District, Muang
Samutsakorn 74000
Thailand
Attn: Mr. Pornchai Kanokvilaratana
Tel: +66-34411324
Fax: +66-34422556
E-mail: pornchai.k@cpintertrade.com
- Importer- Exporter
Products: Fishmeal/fishoil

BS MANUFACTURING CO LTD
385 Bangna-Trad Road
Bangna, Bangkok 10260
Thailand
Attn: Mr. Satien Pornyuenyong
Tel: 66-2-3993401
Fax: 66-2-3993405
E-mail: bsmf@truemail.co.th
Exporter - Processor
Products: Surimi, frozen

CHATHITIRAT INTERNATIONAL PRODUCTS CO LTD
No. 5/27 La San Village
Sukumvit 105 Road
Bang Na, Bangkok
Thailand
Attn: Mr. Vorasak Vorapeechapanich
Tel: 66-2-1422225
Fax: 66-2-6228504
E-mail: direkbank@hotmail.com
Importer
Products: Fishmaws, dried

EFFEM COMMERCIAL ASIA
2535 Sukhumvit Road, Bangchack
Praknanong
Bangkok 10250
Thailand
Attn: Mr. Weerayut Buranalertpisarn
Tel: 66-2-7426301 - 10 ext 117
Fax: 66-2-7426341
Importer- Exporter
Products: Tuna, frozen

FINDUS (THAILAND) LTD
741 Moo 4, Export Processing Zone
Bangpoo Industrial Estate, Praeksa sub-district
A. Muang, Samutprakam 10280
Thailand
Attn: Dr. Titima Tanglertpatbul
Tel: 66-2-7094422-5
Fax: 66-2-7094426
E-mail: rachada.buahthanong@th.findus.com
Importer- Exporter - Processor
Products: Fish, frozen - Salmon/trout, fresh/frozen

INTER-PACIFIC MARINE PRODUCTS CO LTD
49/4 Moo 12, Bangna-Trad Road
Km.45, Bangpakong, Chachoengsao 24130
Thailand
Attn: Mr. Tan Chen Hongxi
Tel: 66-38-542150-3
Fax: 66-38-542149
E-mail: ipmpco@ksc.th.com

Web: www.ipmpco.com
Importer- Exporter - Processor
Products: Fish, frozen - Shrimp, frozen

ITOCHU THAILAND
5th Floor, Harindhorn Tower
54 North Sathorn Road
Bangkok 10500
Thailand
Attn: Mr. Shojiro Toguchi
Tel: 66-2-2663086 ext 359
Fax: 66-2-2663124
E-mail: toguchi.s@itochu.co.th
Importer- Exporter
Products: Fish, frozen - Tuna, frozen

KANTANG COLD STORAGE INDUSTRY CO. LTD
59, Kittikun Road
Kantang, Trang 92110
Thailand
Attn: Mr. Kriangsak Setevoraphan
Tel: 07-52512755
Fax: 07-5252007
E-mail: Ktgroup@cscoms.com
Web: www.ktgroups.net
Importer- Exporter - Processor
Products: Fish, frozen

KAWASHO FOODS (THAILAND) CO, LTD
18th Floor, Ramaland Bldg, 952 Rama IV Road
Suriyanonse, Bangrak
Bangkok 10500
Thailand
Attn: Mr. Akira Yano
Tel: 66-2-6329740
Fax: 66-2-632-9724
E-mail: yano@kawasho.co.th
Importer
Products: Fish, frozen - Salmon/trout, fresh/frozen

KINGFISHER HOLDINGS LIMITED
1 Moo 4, Baan laiklongkru Road
Nadee, Muang, Samutsakorn 74000
Thailand
Attn: Ms. Alinnan Parnhongsa
Tel: 66-034-419888
Fax: 66-034-419895
E-mail: corp@kingfisher.co.th
Web: www.kingfisher.co.th
Importer- Exporter
Products: Tuna, frozen

KITCHEN OF THE OCEAN CO (THAILAND) LTD
61/9 Moo 1, T.Bangrin
A. Muang, Ranong 85000
Thailand
Attn: Mr. Leonard Josiph Minster
Tel: 66-77-823455
Fax: 66-77-823452
Importer- Exporter - Processor
Products: Shrimp, frozen

LUCKY UNION FOODS CO LTD
1/74-75 Samutsakorn Industrial Estate
Rama II Road, Moo 2, T. Thasai, A. Mung
Samutsakorn 74000
Thailand
Attn: Mr. Chong il Ji
Tel: 66-34-490009
Fax: 66-34-490008
E-mail: charlesji@luf.co.th
Web: www.surimiproducts.com
Importer- Exporter - Processor
Products: Surimi, frozen

MAEKLONG FOODS CO LTD
208/1 Moo 1, Vithan-Vithi Road
Amphur. Muang, Samutsongkhram 75000
Thailand
Attn: Mr. Kamchai Rangsiyanant
Tel: 66-34-723491-3 / 9165991
Fax: 66-34-723490 / 718520
E-mail: mkf_th@yahoo.com / worapong@maeklongfoods.com
Web: www.mkfinterfood.com
Importer- Exporter - Processor
Products: Cephalopods (squid/cuttlefish frozen), fresh/frozen - Salmon/trout, fresh/frozen

MAN A FISHERIES CO LTD
56 Sai Ngam Road
Muang, Songkhla
90000 Thailand
Attn: Mr. Wichit Saiyat
Tel: 66-74-323317-9
Fax: 66-74-323320
E-mail: wsaiyat@yahoo.com
Web: manafish.com
Importer- Exporter - Processor
Products: Tuna, fresh/chilled - Tuna, frozen

NARONG SEAFOOD CO LT
5/4-6 Moo 4, Seatakit Road
T. Nadee, A. Muang
Samutsakorn 7400
Thailand
Attn: Mr. Viroj Limsanit
Tel: 66-34827064
Fax: 66-34827063
E-mail: everic@narongseafood.co.th
Web: www.narongseafood.co.th
Importer- Exporter - Processor
Products: Cephalopods, fresh/frozen - Fish fillet, fresh/frozen - Salmon/trout, fresh/frozen - Shrimp, frozen - Squid/cuttlefish, dried - Tuna, frozen

REEFER TRADING CO LTD
236/99 Soi Sukhumvit 68
Sukhumvit Rd, Bangna, Bangkok 10260
Thailand
Attn: Mr. Pichai Sombatsri
Tel: 66-2-3991345
Fax: 66-2-3611720
E-mail: reefer@clickta.com
Importer
Products: Tuna, frozen

RS CANNERY CO., LTD
255/1 Industrial Soi 3
Banpoo Industrial Estate

Samutprakarn 10280
Thailand
Attn: Ms. Pornpim Lipiwattanakarn
Tel: 66-2-7096655
Fax: 66-2-7096627
E-mail: trade@rscannery.com
Importer- Exporter - Processor
Products: Salmon/trout, fresh/frozen - Tuna, frozen

S.K. FOODS (THAILAND) PUBLIC CO LTD
152 Krungthonburi Road
Klongthonsai, Klongsan
Bangkok 10600
Thailand
Attn: Mr. Sompob (James) Khongpurinar
Tel: 66-2-4370407/4291763
Fax: 66-2-4370404
E-mail: james@sk-foods.com
Web: www.sk-foods.com
Importer- Exporter - Processor
Products: Salmon/trout, fresh/frozen - Tuna loins, fresh/frozen

SETHACHON CO. LTD
225 Moo 12, Reparak Road, Bangpli Yai
Bangpli, Samutprakarn 10540
Thailand
Attn: Nuttha Chatlekhavanich
Tel: 66-2-3160421
Fax: 66-2-3160420
E-mail: sales@sethachon.com
Importer- Exporter - Processor
Products: Fish fillet, fresh/frozen

SIAM INTERSEA CO LTD
317/2 Soi Thonglor 15, Sukhumvit 55 Road
Klongton-Nua, Wattana
Bangkok 10110
Thailand
Attn: Mr. Vichein Lerthummajinda
Tel: 66-2-3918989
Fax: 66-2-3918289-90
E-mail: tcc064@asianet.co.th / sisco@siamintersea.co.th
Importer- Exporter
Products: Fish fillet, breaded - Fish fillet, fresh/frozen - Fish, frozen - Salmon/trout, fresh/frozen - Shrimp, frozen - Surimi, frozen - Tuna, frozen

SIAM MARINE FROZEN FOODS CO LTD
1168/11 Lumpini Tower 12th Floor
Rama IV Road, Tungmahamek, Sathorn District
Bangkok 10120
Thailand
Attn: Mr. Piti Suteewong
Tel: 66-2-6798168
Fax: 66-2-6798175
E-mail: piti@siamocean,co,th / worawan@siamocean.co.th
Importer- Exporter - Processor
Products: Bivalve, live/fresh/frozen - Cephalopods (squid, octopus, cuttlefish), fresh/frozen - Shrimp, frozen - Fish fillet, fresh/frozen

SIAM TIN FOOD PRODUCT CO LTD
224 Moo 6, Yontakankumton Road,
Klongkhud, A. Muang Satun
Satun 91000
Thailand
Attn: Mr. Olarn Uyakul
Tel: 66-074-709100
Fax: 66-074-709102-3
E-mail: siamtin@loxinfo.co.th
Importer- Exporter
Products: Fish, frozen - Tuna, frozen - Tuna loins, fresh/frozen

SURAJAI FOOD INDUSTRY CO LTD
12/1 Moo6, Rama2 Road
Bangkaew, Muang, Samut Song-kram
Thailand 75000
Attn: Mr. Jirapong Ekpanyaskun
Tel: 66-081-3517167
Fax: 66-34-714149
E-mail: sjf_foods@yahoo.com
Importer- Exporter - Processor
Products: Fish, frozen - Freshwater fish, fresh/frozen - Tuna loins, fresh/frozen

SURAPON FOODS PUBLIC CO. LTD
247 Moo 1, Theparak Road
T. Theparok, A. Muang
Samutprakorn 10270
Thailand
Attn:
Tel: 662-3853038
Fax: 662-3853176
E-mail: info@surapon.com
Importer- Exporter - Processor
Products: Fish, frozen - Salmon/trout, fresh/frozen

SURAPON NICHIREI FOODS CO LTD
22/5 Moo 4, Theraparak Road
Bangpleeyai, Bangplee
Samutprakarn 10540
Thailand
Attn: Mr. Sithichai Kraisithisirin
Tel: 66-2-3855021-4/7575120-3
Fax: 662-3855119
E-mail: kariya@sunif.co.th / pramoun@sunif.co.th
Importer- Exporter - Processor
Products: Bivalve, live/fresh/frozen - Fish fillet, fresh/frozen - Shrimp, frozen

TEP KINSHO FOODS CO., LTD
76/1-2 Moo 3, Ekkachai Road
Tambol Na-dee, Amphoe Muang
Samut Sakhon 74000
Thailand
Attn: Mr. Preeyaporn Likhitsan
Tel: 66-3486-4331-35
Fax: 66-3486-4336
E-mail: mk@tepkinsho.com / preeyaporn@tepkinsho.com
Web: www.tepkinsho.com
Importer- Exporter - Processor
Products: Fish fillet, breaded - Fish fillet, fresh/frozen - Fish fry/shrimp fry - Fish, fresh/chilled - Fish, frozen - Freshwater fish, fresh/frozen

T. Bankode, A. Muang, Chonburi 20000
Thailand
Attn: Mr. Suthum Sirimai
Tel: 66-38-277423-5 / 66-38-277858-60
Fax: 66-38-272547
E-mail: tscth@tipwanchai.com
Web: www.tipwanchai.com
Importer- Exporter - Processor
Products: Crab, fresh/chilled/frozen - Fish fillet, fresh/frozen - Fish, frozen

TEPPITAK SEAFOOD CO LTD
96/22 Moo 8, Naklua Road District Bana
Amphur Muang, Pattani 94000
Thailand
Attn: Mr. Nirun Vachiraanun
Tel: 66-73-414758-60
Fax: 66-73-311262
E-mail: tptsf@cscoms.com
Web: www.teppitak.com
Importer- Exporter - Processor
Products: Cephalopods, fresh/frozen

THAI AGRI FOODS PUBLIC CO. LTD
155/1 Moo 1, Theparak Road
Bangsaothong, Samutprakarn 10540
Thailand
Attn: Mr. Kittipong Leelayouva
Tel: 66-2-3154171-6
Fax: 66-2-3154169 / 3154188
E-mail: sukanlaya@thaiagri.com
Web: www.thaiagri.com
Importer
Products: Tuna, frozen - Fish, frozen

THAI LUXE ENTERPRISES PUBLIC CO LTD
101/3-4, Nares Road
Bangrak, Bangkok 10500
Thailand
Attn: Mr. Anurot Seneepakonkai
Tel: 66-2-2664725
Fax: 66-2-2367347
E-mail: exim@thailuxe.com
Importer
Products: Freshwater fish, fresh/frozen - Shrimp, fresh/chilled - Tilapia, fresh/frozen

THAI-MC COMPANY LIMITED
968, 24th - 26th Floor
U-Chuliang Foundation Building
Rama 4 Road, Bangrak, Bangkok 10500
Thailand
Attn: Mr. Adisak Phunthong
Tel: 66-2-6324173
Fax: 66-2-6324175
E-mail: adisak.phunthong@mitsubishicorp.com
Importer
Products: Tuna, frozen

THE UNION FROZEN PRODUCTS CO., LTD
1259, 1094/10 Wichianchodok Road,
Mahachai, Muang,
Samutsakorn, Thailand
Attn: Mr. Thongchai Tavanapong
Tel: 66-34-820627-9
Fax: 66-34-424656/821011
E-mail: theufp@ufp.co.th
Web: www.ufp.co.th / www.prantalay.com
Importer- Wholesaler- Distributor- Exporter - Processor
Products: Cephalopods, fresh/frozen - Fish fillet, fresh/frozen - Fish, frozen - Lobster, frozen - Small pelagics, frozen - Squid/cuttlefish, dried - Tuna loins, fresh/frozen

TIPWANCHAI SEAFOODS CO LTD
696 A. Soi Tessabansommutti, Pipit Road

TRANG SEAFOOD PRODUCTS PLC
29 Kantang Road, Khuan Pring
Muang Trang 92000
Thailand
Attn: Mr. Phaisit Hoonpongsimanon (VP)
Tel: 66-75-582134-6
E-mail: info@trstrang.com
Web: www.trstrang.com
Importer- Exporter - Processor
Products: Cephalopods, fresh/frozen - Cephalopods, value-added - Fish, frozen - Salmon/trout, fresh/frozen - Sardine/mackerel/anchovy, canned - Shrimp, frozen - Squid/cuttlefish, dried - Tuna, frozen - Tuna loins, fresh/frozen

TUNA PARADISE CO. LTD
49/7 Moo. 7 T.Khokkloy
A.Takuathung, Phang Nga 82140
Thailand
Attn: Mr. VJ
Tel: +66-76434595
Fax: +66-76434596
E-mail: vjtuna@gmail.com / vj@tunaparadise.com
Web: www.tunaparadise.com
Importer- Wholesaler- Distributor- Exporter - Processor
Products: Cephalopods, fresh/frozen - Lobster, frozen - Fish, fresh/chilled - Freshwater fish, fresh/frozen - Swordfish, fresh/frozen - Tilapia, fresh/frozen - Tuna, fresh/chilled - Tuna, frozen - Tuna loins, fresh/frozen

UNITY TECHNOPRODUCT CO LTD
187/209 Moo7, Soi Chuchart-Anusorn
Bangtalad, Pakkred
Nonthaburi 11120
Thailand
Attn: Mr. Bussakorn Pichitkul
Tel: 66-2-5831070
Fax: 66-2-9605463
E-mail: unity_technoproduct@yahoo.com
Importer- Distributor- Aquaculture- Exporter
Products: Aquarium fish - Shrimp, dried - Shrimp, live - Shrimp/breaded/tempura – Shrimp/cooked & peeled/sushi - Shrimp/freshwater - Surimi, frozen - Tilapia, fresh/frozen - Tilapia, live

V I. INTERNATIONAL CO LTD
61/9 Moo 1, T. Bangrin
A. Muang, Ranong 85000
Thailand
Attn: Mrs. Jarushporn Lamimjit
Tel: 66-77-823044-5

Fax: 66-77-823043
E-mail: viranong@hotmail.com
Web: www.viranong.com
Importer- Wholesaler- Distributor- Exporter - Processor
Products: Fish, frozen - Small pelagics, frozen - Squid/cuttlefish, dried

WATERS & CO UNIVERSE LTD
216/43 L.P.N Tower 12/F
Nanglinchee Road, Yannawa
Bangkok 10120
Thailand
Attn: Mr. Poj Aramwattananont
Fax: 66-2-2854519/20
E-mail: group@waters-universe.com
Importer- Exporter
Products: Cephalopods, fresh/frozen - Tuna, frozen