



TREND OF FUTURE FOOD

IN THAILAND

AND SUPPORTING POLICIES FOR
AGRICULTURE AND FOOD INDUSTRY
DEVELOPMENT

National Food Institute, Thailand



MRS. ANONG PAIJITPRAPAPON
PRESIDENT



ABOUT NFI

NATIONAL FOOD INSTITUTE, THAILAND



▶ NATIONAL FOOD INSTITUTE IS AN INSTITUTE UNDER THE SUPERVISION OF FOUNDATION OF INDUSTRIAL DEVELOPMENT, MINISTRY OF INDUSTRY.

IT WAS ESTABLISHED BY THE CABINET'S RESOLUTION ON 15 OCTOBER 1996 AND THE ORDER OF THE MINISTRY OF INDUSTRY NO. 440/2539 DATED 28 NOVEMBER 1996 FOR THE PURPOSE OF PROMOTING AND DEVELOPING THAILAND'S FOOD INDUSTRY TO ENSURE SUSTAINABLE GROWTH AND INTERNATIONAL COMPETITIVENESS.

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VISION

“TO BE A LEADING ORGANIZATION TO PROMOTE THAILAND AS ASEAN’S FOOD FOR THE FUTURE HUB.”



MISSION

“TO ADVISE POLICIES AND APPROACHES REGARDING FOOD INDUSTRY DEVELOPMENT TO THE GOVERNMENT SECTOR AND TO PROVIDE THE BUSINESS GUIDANCE FOR THE PRIVATE SECTOR;

TO BECOME THE FOOD INDUSTRY CENTRIC ADVISORY WITH VAST DOMESTIC AND INTERNATIONAL NETWORKS;

TO INCORPORATE KNOWHOW AND STATE-OF-THE-ART TECHNOLOGY TO ENHANCE COMPETITIVENESS AND EXPAND BUSINESS OPPORTUNITIES;

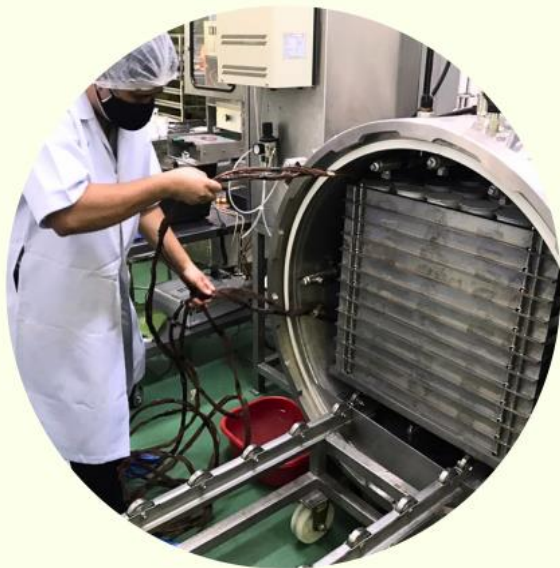
TO CONNECT THE LOCAL ENTREPRENEURS TO THE GLOBAL MARKETS;

TO IMPROVE COMPETENCY AND EFFECTIVENESS OF FOOD INDUSTRY PERSONNEL FOR AGILITY TO CHANGE IN DISRUPTIVE WORLD”

OVERVIEW

THAILAND FOOD INDUSTRY

YEAR 2021



GDP FOOD INDUSTRY VALUE :

27,000 MILLION US\$

GDP FOOD INDUSTRY RATIO PER GDP

COUNTRY : **5.8%**

GDP FOOD INDUSTRY RATIO PER GDP

INDUSTRY : **23%**

OVERVIEW

THAILAND FOOD INDUSTRY

YEAR 2022

NUMBER OF ENTREPRENEURS :

128,000



MICRO + SMALL	94.0%
MEDIUM	5.5%
LARGE	0.5%



NUMBER OF LABOR :

1,077,000



MICRO + SMALL	37.0%
MEDIUM	11.0%
LARGE	52.0%

MONTHLY
FOOD EXPENDITURE OF
THAI HOUSEHOLDS

218.50\$US

35.5%

OF
ALL EXPENDITURE

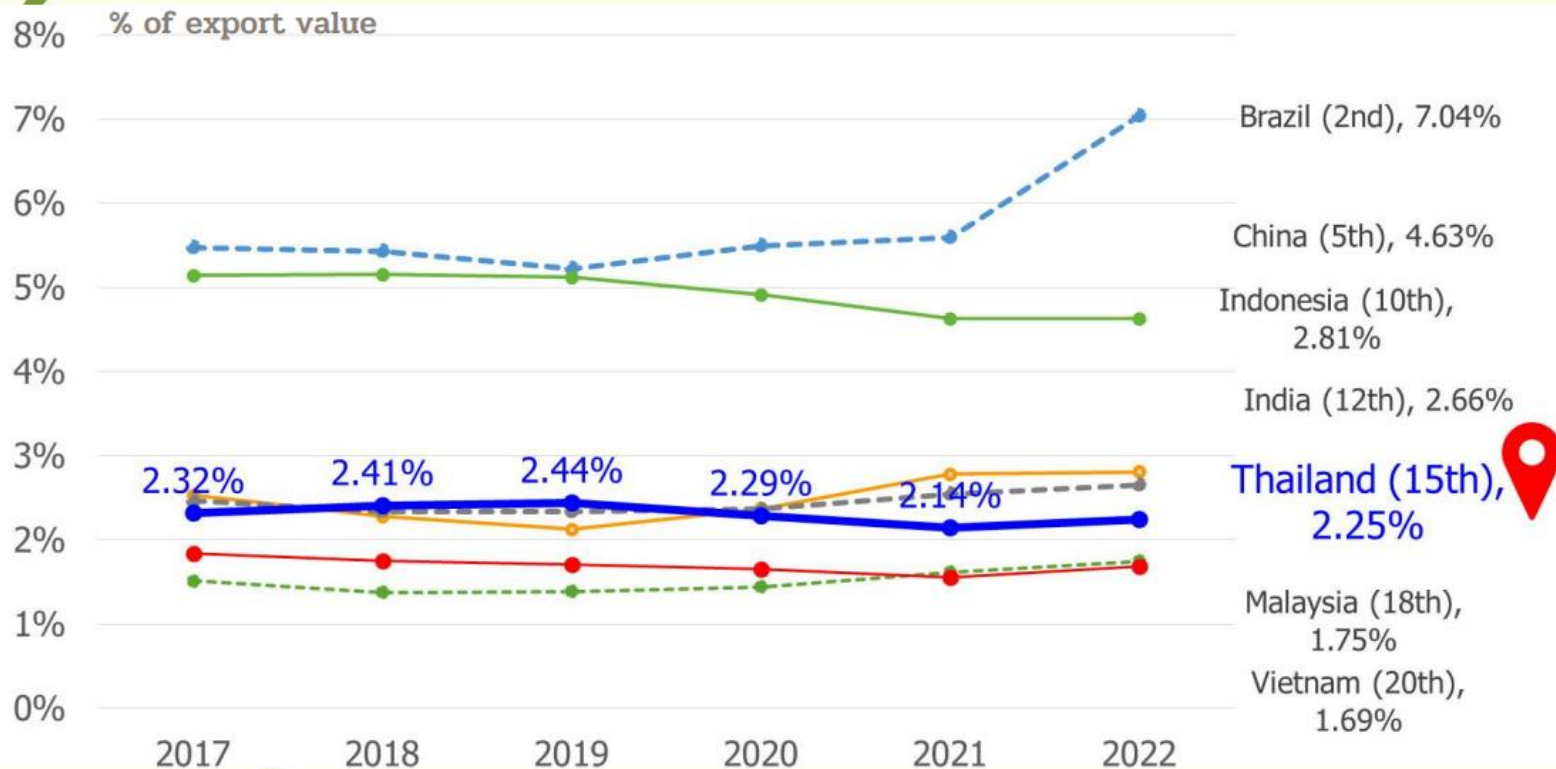
23%

YEAR 2022

SORCE: NATIONAL STATISTIC OFFICE, THAILAND

GLOBAL

FOOD EXPORT MARKET SHARE



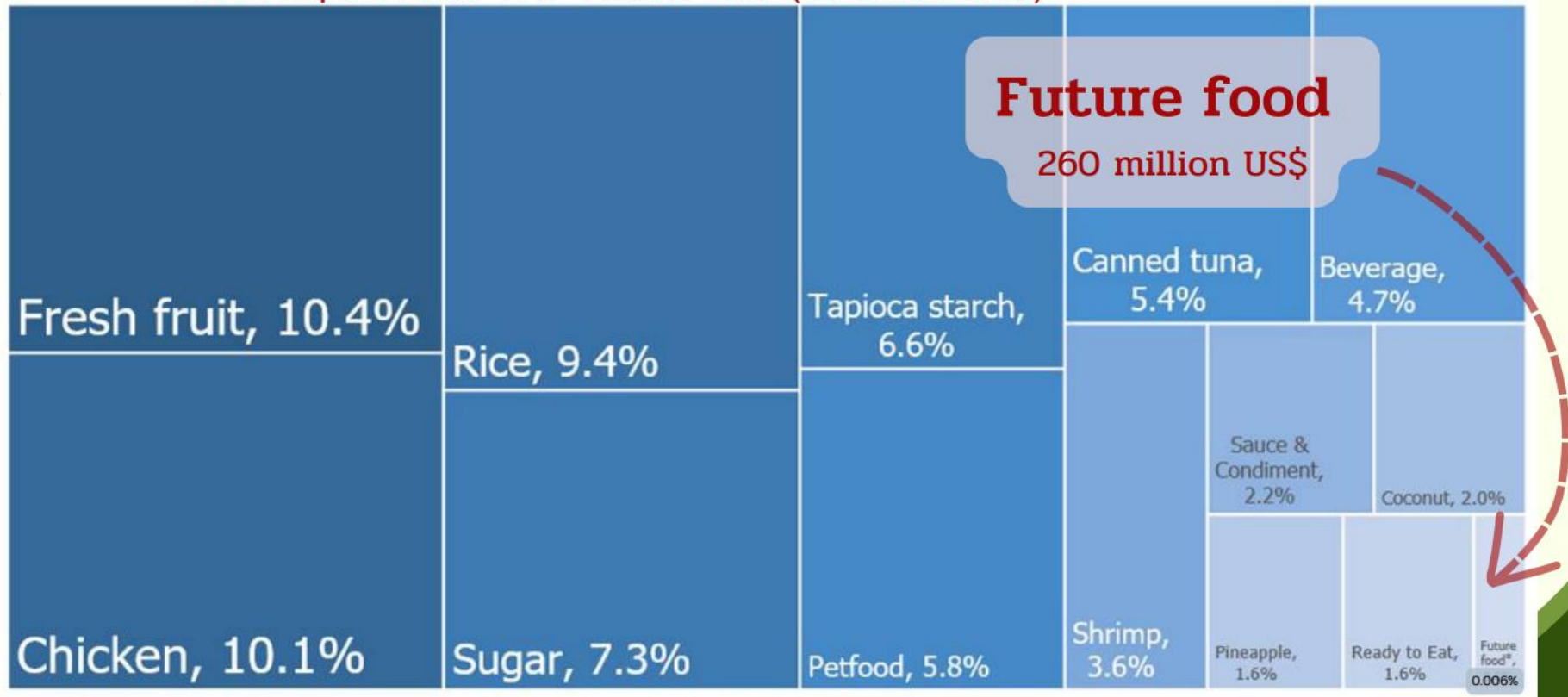
SORCE: GLOBAL TRADE ATLAS



PROPORTION OF THAILAND FOOD PRODUCTS EXPORT

YEAR 2022

Total export value 1.47 Trillion Baht (42 billion US\$)



SOURCE: NATIONAL FOOD INSTITUTE, THAILAND & GLOBAL TRADE ATLAS, IHSMARKIT

NOTE* FUTURE FOOD INCLUDING FUNCTIONAL INGREDIENTS, FOOD SUPPLEMENTS, MEDICAL FOODS



DEFINITION FUTURE FOOD



**NOVEL
FOOD**



**FUNCTIONAL
FOOD**



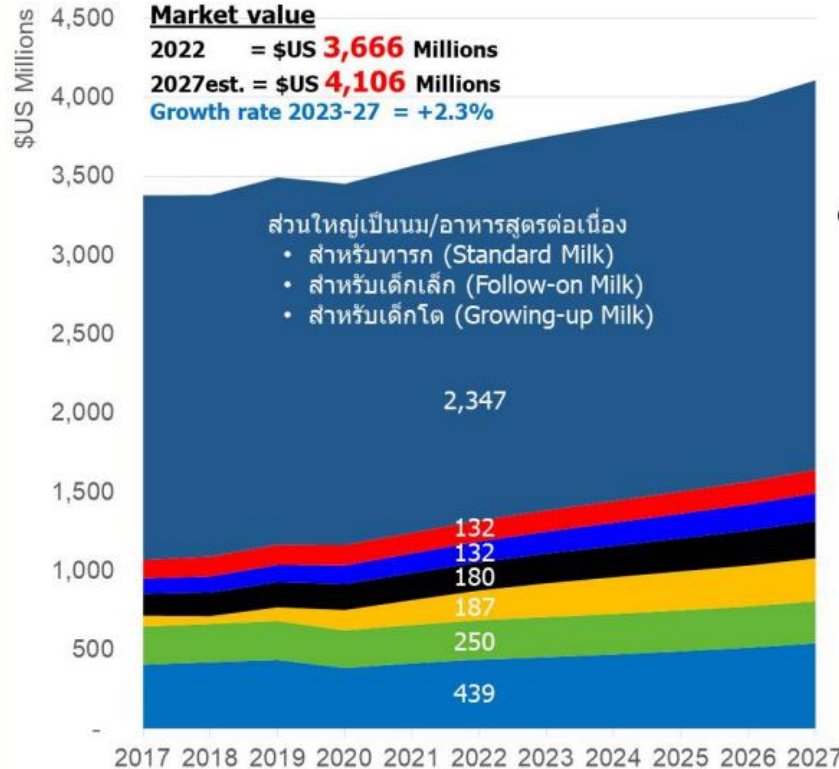
**ORGANIC
FOOD**



**MEDICAL
FOOD**

FUNCTIONAL FOOD

MARKET TREND IN THAILAND



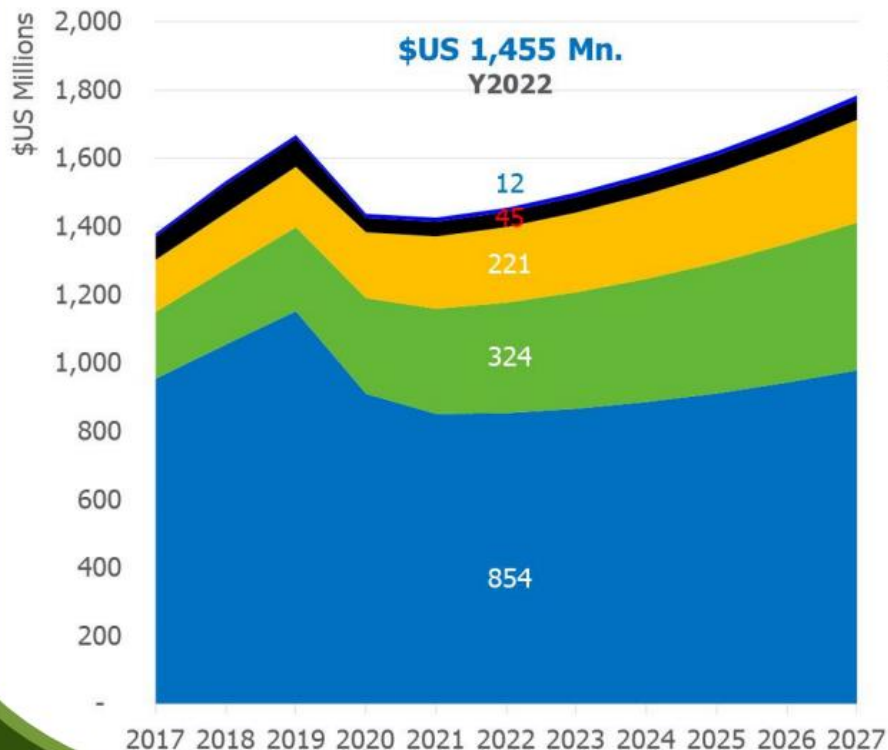
Functional Ingredient trend

Growth rate (est.2023-2027)

Other Functional Food	1.0%	Whey protein Vitamin, Calcium Omega 3, 6, 9 Choline (For Brain) Inulin, Zinc, etc.
Instant/RTD coffee, 148	2.4%	Collagen
Bread/Breakfast Cereals, 176	6.0%	Vitamin
Ready Milk, 236	5.6%	Calcium+ Vitamin D
Bottled Water, 272	7.8%	Amino Acids
Sports Drinks, 267	1.3%	Mineral
Yogurt, 541	4.3%	Reduce fat, Probiotic



HERBAL/TRADITIONAL DIETARY SUPPLEMENTS MARKET TRENDS IN THAILAND



Growth rate (est.2023-2027)

Digestive Remedies (ระบบทางเดินอาหาร), 13	2.4%
Analgesics (บรรเทาอาการปวด), 58	5.4%
Dietary Supplements (เสริมอาหาร), 301	6.4%
Cough, Cold & Allergy (แก้ไอ หวัด และภูมิแพ้), 433	6.0%
Tonics (ผลิตภัณฑ์บำรุง), 979	2.8%



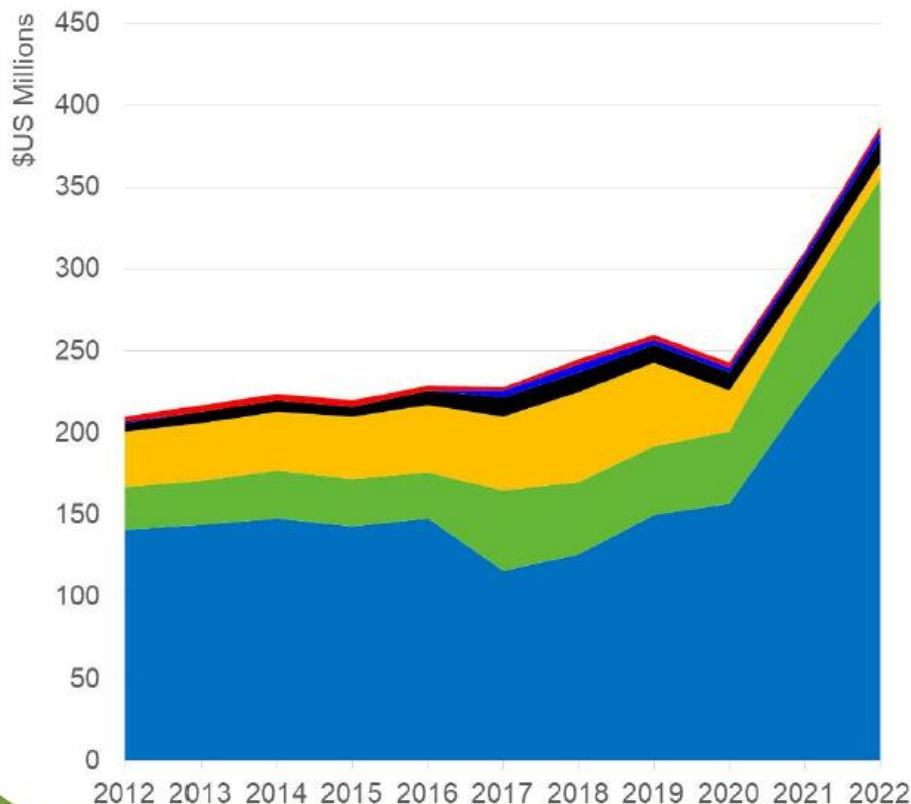
Herbal/ Traditional Dietary Supplements

\$US 1,783 Millions
(+4.2% Growth rate)

SOURCE: NATIONAL FOOD INSTITUTE (NFI), DATA FROM EUROMONITOR

THAILAND

FUTURE FOOD & OTHER RELATED PRODUCTS EXPORT 2012-2022



Medical food, 3
Plant-based protein, 5
Plant Extract, 14
Provitamins / Vitamins, 10
Dietary supplement, 73
Flavour, 282



Future food

\$US 387 Millions
(+24% Growth rate)



FACTORS AFFECTING FUTURE FOOD GROWTH IN THAILAND



THAILAND WILL FULLY ENTER AN **AGING SOCIETY** IN 2022 AND WILL BECOME A **SUPER-AGED SOCIETY** IN THE NEXT 10 YEARS.



THE INCREASING INCIDENCE OF NON-COMMUNICABLE DISEASES OR **NCDS**



THE EXPANSION OF THAILAND'S URBANIZATION IS FASTER THAN OTHER COUNTRIES IN THE SAME LEVEL OF DEVELOPMENT. (**URBANIZATION**)



THAILAND'S TOURISM INDUSTRY HAS A HIGH GROWTH RATE (**TOURISM BOOM**).



PURCHASING POWER OF THAI PEOPLE HAS INCREASED AND IS HIGHER THAN THE AVERAGE OF THE WORLD AND COUNTRIES IN THE REGION (**PURCHASING POWER**).



01 THAILAND'S 20-YEAR NATIONAL STRATEGY

02 THAILAND 4.0 POLICY

S-CURVE INDUSTRIES

03 THE 20-YEAR AGRICULTURE AND
COOPERATIVE STRATEGY (2017-2036)

04 BIO-CIRCULAR-GREEN ECONOMIC MODEL

05 THAILAND SOFT POWER POLICY

06 ACTION PLAN FOR THE DEVELOPMENT OF
THE FOOD PROCESSING INDUSTRY PHASE I

SUPPORTING POLICIES FOR AGRICULTURE AND FOOD INDUSTRY DEVELOPMENT

ACTION PLAN FOR THE DEVELOPMENT OF THE FOOD PROCESSING INDUSTRY

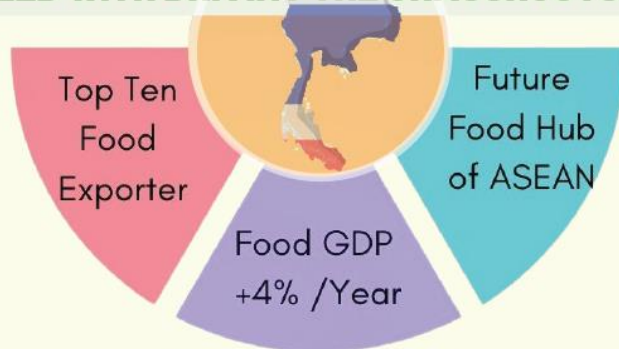
PHASE I (2019-2027) *



VISION

THAILAND IS THE FUTURE FOOD PRODUCTION HUB OF ASEAN,
COUPLED WITH DRIVING THE GRASSROOTS ECONOMY

GOALS



OUTCOMES

NEW GROWTH
ENGINES

INCLUSIVE GROWTH
ENGINES

THAILAND IS EXPECTED TO BE IN THE TOP 10 OF FOOD EXPORTS GLOBALLY WITH A VALUE 1.42 TRILLION BAHT.

*Proposed by The Office of Industrial Economics , Ministry of Industry.
Its was approved by the Cabinet on April 28, 2020.

ACTION PLAN FOR THE DEVELOPMENT OF THE FOOD PROCESSING INDUSTRY PHASE I (2019-2027)



1

DEVELOP 'FOOD WARRIORS'

2

ENCOURAGE FUTURE
FOOD INNOVATION

3

BUILD NEW MARKETING
PLATFORMS

4

STRENGTHEN ENABLING
FACTORS TO FACILITATE THE
GROWTH OF INDUSTRY

**4 PRINCIPLE
MEASURES**

CONCLUSION

01

THAILAND IS UPGRADING THE FOOD INDUSTRY TO THE FUTURE FOOD.

02

THAILAND'S STRENGTH ARE THE AVAILABILITY OF AGRICULTURAL RAW MATERIALS, CONDUCIVE INFRASTRUCTURE, ATTRACTIVE MARKET SIZE AND ADVANTAGE REGIONAL LOGISTICS LOCATION.

03

SOME SMALL AND MEDIUM-SIZED THAI ENTREPRENEURS NEED TO IMPROVE KNOWLEDGE, TECHNOLOGY AND INNOVATION.

04

FOREIGN INVESTMENT IS ONE OF THE KEY STRATEGIES THAT WILL ACCELERATE THAI FOOD INDUSTRY TO ACHIEVE ITS GOALS



THANK YOU

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