Aditya GROUP

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INDUSTRY INTELLIGENCE SERIES

Food, Beverage & Agri-Products in Thailand

Strategic Market Report

For Food Manufacturers, Ingredient Suppliers, Exporters, Retail Brands, Hospitality Groups, Investors and Agri-Food Innovators

Thailand | 2026 Website Edition

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Selected report themes, designed to orient executives quickly before the detailed market analysis.

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1. Executive Summary

Thailand's food, beverage and agri-products industry is one of the country's most strategically important sectors. It combines agricultural depth, food processing capability, export experience, food-service demand, tourism-linked consumption, regional logistics and a globally recognisable Thai cuisine identity. This makes Thailand relevant both as a market and as a production/export base. [1] [2] [3]

The sector is moving from basic commodity supply toward value-added, compliant and innovation-led categories: processed seafood, processed fruits and vegetables, ready-to-eat meals, frozen foods, healthier snacks, functional ingredients, plant-based and alternative proteins, herbal extracts, sustainable ingredients, premium non-alcoholic beverages and private-label food solutions. [2] [4] [5]

Thailand's total exports reached a record level of approximately USD 339.6 billion in 2025, while food and agricultural products continued to represent an important part of the country's export base. However, 2026 export conditions are expected to be more cautious because of tariff uncertainty, currency pressure, geopolitical tensions and slower global demand. [3] [6]

For investors, exporters and food brands, the central question is no longer whether Thailand has food-sector potential. The real question is whether a company can build the right product-market fit, channel strategy, quality documentation, regulatory pathway, supplier base and export execution model.

Strategic theme	Implication for investors and brands
Kitchen of the World, now upgraded	Thailand's food identity remains strong, but winning brands must combine authenticity with food safety, packaging, convenience and modern claims.
Processing and export base	Processed seafood, fruit, vegetables, frozen food and RTE meals offer strong B2B and export opportunities, provided quality and certification are managed.
Future food momentum	Functional ingredients, plant proteins, microbial proteins, herbal extracts and health-oriented food products are becoming policy-supported growth areas.
Retail and convenience-led demand	Convenience stores, supermarkets, online channels and tourism-linked consumption are reshaping product size, packaging, pricing and SKU strategy.
Execution gap	Many companies underestimate Thai FDA requirements, importer structure, labeling, shelf-life documentation, distributor economics and buyer validation.

Aditya Group view The best opportunities are not generic food trading. They are in value-added, compliant, branded and export-ready food concepts where Thailand can add credibility, sourcing depth and regional execution. Foreign entrants need a practical route to market covering regulatory classification, importer selection, channel fit, pricing, documentation and local partner management. Thai producers seeking export growth need stronger B2B presentation, packaging architecture, certifications, market prioritisation and buyer-facing credibility.

2. Industry Overview

The food, beverage and agri-products sector spans the full chain from farm inputs and raw agricultural commodities to processed foods, functional ingredients, packaged beverages, food-service supply, retail brands and export logistics. In Thailand, the industry is closely linked to rural productivity, manufacturing, hospitality, retail, tourism, logistics and trade promotion.

2.1 Industry value chain

Layer	Examples	Key economics and success factors
Agriculture and raw materials	Rice, fruits, vegetables, seafood, poultry, herbs, sugarcane, cassava, coconut, plant proteins, spices	Yield stability, climate resilience, traceability, farm standards, raw-material cost and quality consistency.
Ingredient and input supply	Flours, starches, oils, extracts, dairy ingredients, plant proteins, natural preservatives, sweeteners, flavours	Supplier reliability, formulation compatibility, import dependency, functional claims and cost control.
Processing and manufacturing	Canned seafood, frozen foods, RTE meals, fruit processing, sauces, snacks, bakery, non-alcoholic beverages, supplements-adjacent foods	Food safety systems, automation, capacity utilisation, batch quality, shelf life, packaging and certifications.
Distribution and retail	Convenience stores, supermarkets, food service, HoReCa, online platforms, distributors, wholesalers, export buyers	Margins, cold-chain, listing fees, sell-through data, merchandising, distributor discipline.
Brand and export layer	Thai food brands, private label, OEM, hospitality products, premium agri-products, ethnic cuisine, future foods	Positioning, packaging, documentation, certifications, trade show readiness and buyer trust.

2.2 Core segments

Processed food: canned seafood, processed fruits and vegetables, frozen meals, ready-to-eat products, snacks, sauces, seasonings and meal kits.

Agri-products: rice, fruits, vegetables, herbs, cassava, coconut, sugar-based products, plant-based raw materials and selected commodity exports.

Food ingredients: functional ingredients, natural extracts, dairy ingredients, proteins, starches, flavour systems, bakery inputs and specialty ingredients.

Non-alcoholic beverages: bottled water, functional drinks, juices, teas, coffee, premium mixers, health beverages and hospitality beverages.

Future food: alternative proteins, plant-based products, functional foods, nutraceutical-adjacent foods, elderly nutrition and sustainable food innovation.

Hospitality and food service: hotel supply, airline catering, restaurants, cafes, MICE, tourism-linked food retail and gourmet experiences.

3. Thailand Market Context

Thailand has long used food as both an economic sector and a national brand asset. The country benefits from a wide agricultural base, export infrastructure, a large food-processing industry, an international tourism platform and strong global recognition of Thai cuisine. [1] [3]

BOI's 2025 agritech and foodtech material frames Thailand's strategy around smart technology, sustainable production and equitable growth, with a national direction to improve productivity, conserve natural resources and build a resilient agri-food future. [1]

The same BOI material places agriculture, biotechnology and Food for the Future within Thailand's S-Curve policy architecture, while linking the sector to the Bio-Circular-Green economy model and the goal of becoming a regional hub for future food innovation. [1]

USDA FAS notes that Thailand's food processing ingredients market is expected to continue growing, especially in health-oriented ingredients, alternative proteins from plants and microorganisms, herbal extracts, dietary supplement-adjacent ingredients and sustainable ingredients. [2]

Market driver	Why it matters
Tourism and hospitality recovery	Hotels, restaurants, cafes, airports, MICE venues and travel retail increase demand for packaged food, beverages, snacks and premium Thai products.
Urban convenience consumption	Working lifestyles and convenience-store expansion support RTE meals, frozen food, single-serve packs and functional drinks.
Export credibility	Thailand is recognised for processed seafood, tropical fruits, sauces, rice, frozen products and Thai cuisine formats.
Health and functional demand	Consumers are seeking protein, lower sugar, natural ingredients, digestive health, immunity, elderly nutrition and sustainable choices.
Technology and sustainability policy	Precision agriculture, foodtech, traceability and future food are being promoted as productivity and competitiveness levers.

4. Market Intelligence & Key Trends

4.1 Health, convenience and premium value are converging

The strongest growth concepts combine convenience with a credible health or quality story. USDA FAS identifies growing demand for ingredients used in specialized nutrition, elderly food, performance-oriented products and health-focused food trends, while also noting that today's consumer standard increasingly combines novelty, experience, health and reasonable pricing. [2]

4.2 Ready-to-eat and frozen formats continue to gain relevance

Krungsri Research expects Thailand's domestic ready-to-eat food sales volume to expand by an average of 2.3-3.3% annually during 2026-2028, while export volume is forecast to expand by 2.9-3.9% annually. Growth is supported by convenience lifestyles, data analytics, product innovation and distribution reach, although 2026 may remain restrained by weaker purchasing power and tariff-related headwinds. [4]

4.3 Processed seafood, fruits and vegetables remain export anchors

USDA FAS reports that processed seafood expanded by 4-5% in 2025, with canned and processed seafood exports valued at USD 3.8 billion, representing 16% of total food and agricultural product export value. Processed fruits and vegetables were also growing, with canned and processed fruit exports at USD 2.5 billion. [5]

4.4 Non-alcoholic beverages are supported by tourism, health and outdoor consumption

Krungsri Research forecasts Thai beverage output to expand by 3.5-4.5% annually during 2025-2027, led mainly by domestic demand, inventory rebuilding and development of health drinks. Non-alcoholic beverages are expected to benefit from bottled water, mineral water, carbonated beverages, tourism recovery and out-of-home activities. [7]

4.5 Future food is becoming a policy-supported growth area

NXPO's policy recommendations target an increase in Thailand's future food industry value to THB 500 billion by 2027, and propose investment in advanced extraction and formulation technologies, R&D consortia, certification systems and a regulatory sandbox for functional claims. [8]

The opportunity is especially relevant for functional ingredients, proteins, herbal extracts, senior nutrition, plant-based products, sustainable packaging, Thai botanical ingredients and export-oriented formulations.

4.6 Compliance and traceability are becoming commercial differentiators

Food buyers increasingly assess not only price and taste, but also documentation, production standards, allergen control, shelf-life evidence, labeling, claims, ESG posture, packaging sustainability and supplier audit readiness.

5. Opportunity Landscape

Opportunity area	Why it is attractive	Commercial route
Export-ready Thai food brands	Thai cuisine recognition supports sauces, snacks, meal kits, instant products and premium regional flavours.	Develop export pack, documentation, buyer presentation, market-priority matrix and distributor selection.
Processed fruit and tropical ingredients	Thailand has strong fruit diversity and demand for healthy, convenient, shelf-stable products.	Freeze-dried fruit, dried fruit, purees, canned fruit, beverage bases and hotel/airline snack formats.
Functional and health-oriented ingredients	Demand is rising for protein, fibre, botanical extracts, low-sugar systems and elderly nutrition.	Supplier qualification, formulation partner selection, claims review and route-to-market planning.
Ready-to-eat and frozen meals	Urban lifestyle, convenience stores and global interest in Thai food support RTE and frozen formats.	OEM/private label, food-service packs, retail packs and export channels.
Non-alcoholic beverages	Tourism, health trends and premium hospitality create opportunities for functional drinks, juices, teas and coffee formats.	Hospitality listings, retail tests, B2B distributors, wellness channels and gifting.
Private label and OEM food development	Foreign buyers often need Thailand-based sourcing and product adaptation without building factories.	Supplier search, sample control, costing, packaging, QA documentation and export coordination.
Agri-product sourcing and trading	Selected products have strong demand but require disciplined risk control and quality checks.	Validated sourcing, payment-risk review, logistics planning, margin structure and buyer due diligence.

Best-fit client profiles Foreign food brands entering Thailand or using Thailand as an ASEAN test market. Ingredient companies seeking Thai manufacturers, distributors or food-service customers. Thai manufacturers seeking export-market development and higher-quality B2B presentation. Hospitality and travel groups developing branded food, beverage, amenity or gifting concepts. Investors exploring foodtech, future food, agri-processing or distribution ventures.

6. Competitive & Operating Environment

Thailand is competitive but fragmented. Large conglomerates dominate several categories, while thousands of SMEs operate across ingredients, processed foods, snacks, beverages, seafood, fruit processing and private-label production. This creates both opportunity and complexity: there are many suppliers, but not all are export-ready or buyer-ready.

6.1 Competitive layers

Competitor type	Strengths	Weaknesses / gaps
Large integrated food groups	Scale, certifications, export capability, distribution, R&D and financial strength.	Less flexible for small MOQs, custom projects or niche product experimentation.
Mid-sized OEM/ODM producers	Good balance of flexibility, capability and category specialization.	Documentation, English communication, design quality and export sales may vary.
SME and provincial producers	Authenticity, local ingredients, differentiated products and cost flexibility.	Often weak in compliance files, packaging, QC systems, buyer communication and consistency.
Importers and distributors	Channel relationships, listings, warehouse network and regulatory handling.	May demand exclusivity, high margin, slow sell-through and limited brand-building commitment.

Competitor type	Strengths	Weaknesses / gaps
Retail/private-label buyers	Clear volume potential, structured requirements and market data.	Strict pricing, quality, packaging and supply reliability expectations.

6.2 Operating success factors

Define the product category precisely before approaching Thai FDA, suppliers or buyers.

Validate whether the product is a commodity, premium product, functional product, private label item or regulated food with special claims.

Check shelf life, storage conditions, cold-chain requirements and export documentation before pricing the opportunity.

Build channel economics from retail price backwards, including distributor margin, retailer margin, promotions, listing costs and logistics.

Assess whether Thailand is the best manufacturing base, sourcing base, branding base, test market or export coordination hub for the client.

7. Regulatory & Compliance Considerations

Food is a regulated sector in Thailand. The Thai Food and Drug Administration under the Ministry of Public Health is central to import, manufacturing, product licensing, labeling and advertising compliance. Regulatory planning should be completed before supplier commitments, label printing or market launch.

Thai FDA states that a food importer must obtain a license under Section 15 of the Food Act B.E. 2522, and that the importer must be a person or juristic person with a commercial registration certificate and a place of business in Thailand. [9]

Thai FDA guidance also notes that product licenses may be required for specifically controlled foods, foods with quality or standard requirements, or foods with labeling requirements; advertising licenses may be required when representing food quality, properties or benefits through advertising media. [10]

Compliance area	What to check before launch
Importer/manufacturer status	Whether the Thai entity holds the correct FDA license and whether the premises, warehouse or production site is acceptable.
Food classification	Whether the product is general food, food with quality/standard requirements, specifically controlled food, food with labeling requirements or a product with special claims.
Product registration / serial number	Whether product-level approval, notification or food serial number is required before sale/import.
Labeling	Thai language requirements, ingredients, allergens, nutrition, claims, net weight, manufacturer/importer details, expiry date and storage instructions.
Claims and advertising	Health, nutrition, functional, natural, organic, sustainability and performance claims require legal and scientific review.
Quality systems	GMP, HACCP, ISO 22000, BRCGS, Halal, Organic or market-specific buyer standards depending on target market.
Export documentation	Certificate of origin, health certificate, phytosanitary certificate, lab test, COA, MSDS where relevant, and destination-market requirements.

Note: This report is a business strategy document, not legal advice. Food regulation should be confirmed with qualified regulatory professionals before investment, importation or product launch.

8. Market Entry & Execution Considerations

The right entry model depends on whether the client wants to sell into Thailand, source from Thailand, manufacture in Thailand, create a Thai-branded export product, or build a long-term foodtech/agri-processing platform.

Entry route	Best suited for	Key execution requirements
Importer/distributor model	Foreign packaged food or ingredient brands entering Thailand.	Regulatory license, distributor selection, channel plan, pricing architecture, training and sell-through support.
Direct B2B supply	Ingredient companies selling to manufacturers, hotels, bakeries, cafes or food-service groups.	Buyer mapping, sampling protocol, technical sheet, pricing, logistics and repeat-order management.

Entry route	Best suited for	Key execution requirements
OEM/private label development	Retailers, hospitality groups and export brands needing Thai-made products.	Supplier screening, formulation, MOQ negotiation, packaging, QA documentation and export compliance.
Trading and sourcing model	Agri-products, food inputs, seafood, fruit, rice and processed commodities.	Supplier validation, contract terms, quality inspection, working-capital planning, payment risk and logistics.
Manufacturing investment	Brands requiring control, scale, BOI incentives or regional export base.	Feasibility study, location, BOI/legal review, factory setup, hiring, certifications and market access.
Foodtech / future food venture	Alternative proteins, functional food, extraction, fermentation, smart agriculture or high-value processing.	Technology validation, R&D partners, regulatory pathway, investment structure and commercialization plan.

8.1 Practical 90-day market-entry roadmap

Phase	Activities	Outputs
Days 1-30: Diagnose	Category definition, regulatory scan, buyer/customer hypothesis, competitor scan, price benchmarking, channel economics.	Market-entry thesis, risk list, regulatory route, initial buyer map.
Days 31-60: Validate	Supplier or distributor interviews, sample testing, buyer feedback, costing, packaging review, claims review, shortlist partners.	Validated product-market fit, partner shortlist, revised pricing and operating assumptions.
Days 61-90: Execute	Pilot order, registration/label process, trade collateral, negotiation support, trial listing or B2B pitch execution.	Pilot launch plan, commercial terms, implementation timeline and scale-up decision.

9. Risks, Challenges & Watchpoints

Risk	Why it matters	Mitigation approach
Regulatory misclassification	Wrong classification can delay import, product approval, labeling or advertising.	Conduct early Thai FDA classification review and avoid premature label/claim commitments.
Weak supplier validation	Low price suppliers may fail consistency, documentation, hygiene or export readiness.	Audit capability, request COA/specifications, check certifications and run sample/batch validation.
Margin compression	Distributor, retailer, logistics, promotion and listing costs can destroy profitability.	Build bottom-up pricing and channel economics before committing to launch.
Shelf-life and cold-chain risk	Temperature-sensitive goods can fail in Thailand's climate or export logistics.	Test stability, packaging, storage requirements and cold-chain cost.
Commodity price volatility	Agricultural inputs are exposed to climate, currency, freight and seasonal variability.	Use flexible sourcing, price validity clauses, hedging where appropriate and inventory planning.
Unproven claims	Functional, health, natural or sustainability claims create compliance and reputational risk.	Substantiate claims with evidence, lab tests and regulatory review.
Export headwinds	Tariffs, baht appreciation, freight cost and geopolitical shifts affect competitiveness.	Diversify markets, optimise Incoterms, localise packaging and stress-test landed cost.

10. Aditya Group Perspective

Aditya Group views food, beverage and agri-products as a high-potential but execution-sensitive industry. The sector rewards companies that combine product quality, local insight, regulatory discipline, supplier control and channel realism. It penalizes companies that enter through assumptions, unverified partners, weak packaging or generic trading logic.

For Thailand, the strongest themes are value-added processing, export-ready Thai food products, health-oriented ingredients, future food, non-alcoholic beverages, sustainable packaging, hospitality-linked product formats and disciplined sourcing. These areas connect directly with Aditya Group's market-entry, trading, travel, product-development and Thailand execution capabilities.

Strategic thesis Thailand is already a credible food country. The next layer of value is in converting food credibility into modern products, modern documentation, modern channels and modern export execution. Clients should avoid treating Thailand only as a low-cost supplier market. The more defensible strategy is to use Thailand as a value-added platform for formulation, branding, packaging, sourcing, hospitality access and ASEAN/global trade routes. The winning model is not only "find buyer / find supplier". It is research-led execution from opportunity mapping to partner validation and commercial implementation.

11. How Aditya Group Can Support

Client need	Aditya Group support
Market entry strategy	Market sizing, category analysis, competitor benchmarking, channel strategy, regulatory-route mapping and investment-option review.
Distributor and buyer access	Importer/distributor mapping, buyer outreach, meeting setup, negotiation support and partner due diligence.
Sourcing and supplier validation	Supplier search, capability screening, factory coordination, sample management, cost comparison and quality documentation review.
OEM/private label development	Product concept, formulation brief, packaging direction, MOQ negotiation, production coordination and export-readiness support.
Regulatory navigation	Thai FDA pathway coordination, labeling review coordination, claims-risk screening and documentation checklist development.
Export and trade support	Buyer presentation, trade-show preparation, export pricing, logistics coordination, Incoterms planning and contract-review support.
Investment and setup support	BOI/legal/accounting coordination, company setup, feasibility analysis, local operating model and execution supervision.
Brand and collateral development	B2B profile, product sheets, website copy, buyer decks, category story and export presentation material.

11.1 Aditya Group engagement models

Strategic consultation for market-entry or sourcing feasibility.

Market research and partner mapping for food, beverage, ingredient and agri-product categories.

Business matching and commercial introduction to buyers, suppliers, distributors or manufacturers.

Build-operate-transfer or local execution support for companies that need Thailand-based operations before building a full team.

Trading and sourcing support where commercial risk, payment terms and operational control are clearly structured.

12. Selected Relevant Experience

Aditya Group's relevance to this sector comes from a combination of market-entry advisory, trading experience, sourcing, hospitality knowledge, export-oriented brand development and execution support in Thailand. The group has worked across multiple industries where supplier validation, distribution, regulatory coordination, cross-border trade and local partner management are critical.

Capability area	Relevance to food, beverage and agri-products
Market-entry advisory	Helping foreign companies understand Thai market structure, legal setup, buyer behaviour, cost assumptions and execution risk.
Trading and sourcing	Evaluating supplier reliability, commercial terms, margins, credit risk, logistics and transaction discipline.
Hospitality and travel ecosystem	Understanding hotel, travel, MICE and premium-consumer channels where food and beverage products can be positioned.
Product-development orientation	Supporting packaging, B2B presentation, brand architecture, SKU planning and export buyer readiness.
Technology and digital capability	Applying data, CRM, website, B2B outreach and digital collateral to improve market-entry execution.

Sources

[1] Thailand Board of Investment (BOI), Thailand Agritech & Foodtech, 2025/2026 investment-promotion material.

[2] USDA Foreign Agricultural Service, Food Processing Ingredients Annual - Bangkok, Thailand, 2026.

[3] Thailand Public Relations Department / Ministry of Commerce summary, Thailand exports reached approximately USD 339.6 billion in 2025.

[4] Krungsri Research, Industry Outlook 2026-2028: Ready-to-Eat Food Industry.

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[6] Reuters, Thailand export outlook and 2026 trade-risk commentary citing Ministry of Commerce / TPSO.

[7] Krungsri Research, Industry Outlook 2025-2027: Beverage Industry.

[8] NXPO, Policy Recommendations for Driving Thailand's Future Food Industry through Science, Research and Innovation.

[9] Thai Food and Drug Administration, Food Importation guidance under the Food Act B.E. 2522.

[10] Thai Food and Drug Administration, food entrepreneur FAQs on product licenses, labeling requirements and advertising licenses.

Build the Right Thailand Entry Strategy

Aditya Group helps clients evaluate market potential, identify partners, structure practical entry routes and coordinate local execution in Thailand.

Connect with Aditya Group Thailand

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