ITALIAN TRADE AGENCY
Bangkok Office

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THAILANDIA
FOOD AND BEVERAGE INDUSTRY REPORT

20
25

September 2025

ITALIAN TRADE AGENCY

THAILAND - FOOD AND BEVERAGE INDUSTRY

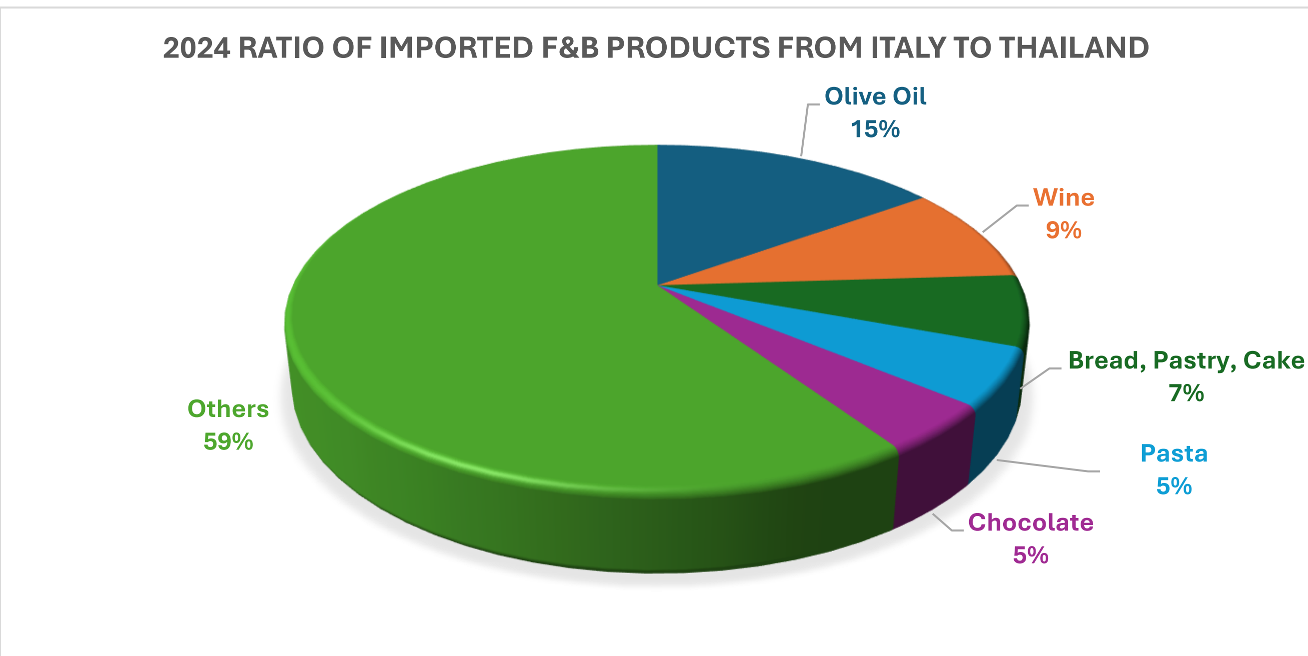
Overview

The food industry is one of the most important sectors contributing to Thailand's exports. In 2024, Thailand food exports expanded by 4.1% from the previous year, amounting to a value of USD36.4 billion. Meanwhile, the total F&B products imported from the world to Thailand reached a value of approximately USD17 billion, increase 0.9% over the previous year. The market is expected to grow annually by up to 5% and 12% (CAGR, 2023-2027) for food and beverage, respectively.

Italy ranking as the 20th largest food and beverage supplier for Thailand at the end of 2024 in which the import value reached USD184.6 million, increasing 8.6% from previous year. The category was divided into 141.7 million USD for food and 26.7 million USD for beverage with a growth of 4.9% and 8.5%, respectively. The amount accounted for 0.99% of overall Thailand import of food and beverage from the world.

Among these, we point out 5 significant imported of food and beverage products from Italy: olive oil (15%); Wine (9%); bread, pastry, cakes, biscuits and other baking products (7%); pasta (5%); and Chocolate (5%). These 5 groups account for around 40% of the value of food products imported from Italy.

Source: Thailand Ministry of Commerce



The growth of the Food and Beverage industry in Thailand is significantly driven by tourism and economic factors including market trends. After the world economy recovered and since the Thai government issued the free-visa policy, the industry aims to grow gradually by 4.0–5.0% annually from 2024 to 2026, as this helps attract more international tourists to stimulate the Thai economy. Moreover, domestic travel trips are also increasing as the situation returns to normal after the COVID-19 pandemic.

Key Trends

Consumer behaviour and urbanisation are considered key trends shaping the food and beverage industry. Specifically, Thailand is advancing in processed food and ready-to-eat meals, as the fast-paced lifestyle leads Thai consumers to prefer convenient options that help save time for work and other activities. Digital sales in the Southeast Asian F&B industry are expected to reach USD38 billion by 2025. In Thailand, e-commerce platforms are vital players in driving the economy forward, with internet access and social media playing crucial roles in influencing consumer decisions. This presents strong opportunities for businesses to evolve and adapt to modern preferences.

Restaurant & Delivery

In 2024, Thailand's restaurant industry is shifting based on consumer preferences and economic conditions. Fine-dining and gourmet restaurants are growing as urbanisation and social media influencers shape tastes, especially in Bangkok. At the same time, economic pressures such as debt, inflation, and living expenses affect consumer budgeting. Limited-service restaurants occupy 15% of the HRI sector, with 33,253 outlets in 2024 and a target of 34,322 in 2025. This growth reflects the popularity of quick-service restaurants, which align with the lifestyles of much of the working population. Full-service restaurants hold 14% of the industry, with tourism driving demand.

The rise of delivery platforms also significantly affects the market. Line Man holds 44% of the market share, followed by Grab (40%) and Shopee Food (10%). These platforms offer consumers alternatives and help restaurants boost profits, as delivery prices can be marked up by as much as 35% due to service fees—setting new pricing standards in consumers' minds.

Retail Market

The retail sector ranks second in GDP contribution in Thailand at 24.9%. It is powered by hypermarkets, supermarkets, and convenience stores such as The Mall Group, Makro, Big C, Tesco Lotus, and 7-Eleven. To support Italian goods, top chains like Central Group and The Mall Group (Gourmet Market) promote Italian food products at least once a year, expanding their offerings. Retail services contribute the most income among food and beverage channels and are expected to grow by 5.08% between 2024 and 2029. Modern trade plays a vital role in this development and aims for growth of 5.0–5.5% during 2024–2026.

USD, %

Significant Food and Beverage Import Value from Italy - Value (USD) 2022-2024; 2025 (Jan-Jun)								
N.	**Description**	**Value: USD**			**Market Share: %**		**Growth: %**	
		2023	**2024**	**2025** (Jan-Jun)	**2024**	**2025** (Jan-Jun)	**2023/24**	**2024/25** (Jan-Jun)
	Total	**159,761,488**	**168,468,360**	**79,262,047**	**100**	**100**	**5.45**	**-0.72**
1	**Wine (HS2204, HS2205)**	**14,215,953**	**16,460,787**	**9,796,794**	**12.23**	**12.19**	**15.79**	**48.4**
	Wine of Fresh Grapes, Including Fortified Wines; Grape Must (Having an Alcoholic Strength By Volume Exceeding 0.5% Vol.) Nesoi (HS2204)	13,828,824	15,862,046	9,477,974	12.62	12.71	14.70	48.02
	Vermouth and Other Wine Of Fresh Grapes Flavored With Plants Or Aromatic Substances (HS2205)	387,129	598,741	318,820	6.72	6.77	54.66	60.86
2	**Snacks & Confectionery, Pastry (HS1904, HS1905, HS190531)**	**13,849,320**	**15,259,649**	**6,801,821**	**3.22**	**3.02**	**10.18**	**18.76**
	Sugar Confectionary (Including White Chocolate), Not Containing Cocoa (HS1704)	404,276	369,088	201,415	0.25	0.26	-8.7	-4.1
	Prepared Foods From Swelling Or Roasting Cereals Or Products; Cereals (Exc Corn), In Grain Form Flakes Or Worked Grain Prepared N.E.S.O.I (HS1904)	280,582	224,856	105,838	0.41	0.39	-19.86	2.11
	Bread, Pastry, Cakes, Bisuits and Other Bakers' Wares; Communion Wafers, Empty Capsules for Medicine Etc., Sealing Wafers, Rice Paper Etc. (HS1905)	10,987,416	12,286,496	6,695,983	3.73	3.28	11.82	19.06
	Sweet buscuits (HS190531)	2,581,322	2,748,297	1,771,154	3.04	3.63	6.47	38.3
3	**Olive oil - Olive Oil And Its Fractions, Whether Or Not Refined, But Not Chemically Modified (HS1509)**	**8,536,327**	**13,928,791**	**7,332,944**	**28.56**	**39.62**	**63.17**	**12.92**
4	**Pasta - Pasta, Whether Or Not Cooked Or Stuffed Or Otherwise Prepared, Including Spagetti, Lasagna, Noodles Etc.; Couscous, Whether Or Not Prepared (HS1902)**	**7,781,539**	**9,974,897**	**5,319,685**	**12.61**	**8.94**	**28.19**	**7.38**

5	**Non-Alcoholic Beverages (HS2201, HS2202, HS220229, HS09)**	**7,801,319**	**8,669,136**	**3,975,500**	**1.29**	**1.17**	**11.12**	**-1.67**
	Waters, Including Natural Or Artificial Mineral Waters And Aerated Waters, Not Containing Added Sweetening Nor Flavored; Ice And Snow (HS2201)	4,507,625	5,117,831	2,522,909	28.1	26.18	13.54	13.79
	Waters, Including Mineral Waters And Aerated Waters, Containing Added Sweetening Or Flavored, And Other Nonalcoholic Beverages Nesoi (HS2202)	349,441	266,799	103,010	0.85	0.22	-23.65	20.98
	Other non-alcoholic beverages (except water, non-alcoholic beer and items of Heading 20.09), including plant-based drink (HS220299)	31,565	18,303	6,850	0.11	0.01	-42.01	63.96
	Coffee, Tea, Mate And Spices (HS09)	2,912,688	3,266,203	1,349,580	0.54	0.67	12.14	-22.46
6	**Chocolate - Chocolate and Other Food Preparations Containing Cocoa (HS1806)**	**6,449,132**	**8,247,058**	**2,451,771**	**4.07**	**2.08**	**27.88**	**-23.66**
7	**Cheese - Cheese And Curd (HS0406)**	**7,975,649**	**8,175,233**	**5,464,817**	**6.29**	**5.95**	**2.5**	**40.22**
8	**Canned Vegatable Preserves (HS2002, HS2005, HS0711)**	**4,567,881**	**5,613,025**	**2,236,709**	**8.03**	**7.98**	**22.88**	**-12.47**
	Tomatoes Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid (HS2002)	3,833,166	4,586,804	1,840,471	12.44	16.87	19.66	-13.17
	Vegetables, Other Than Tomatoes, Mushrooms And Truffles, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid, Not Frozen Exc Prdcts Of 2006 (HS2005)	731,220	1,025,954	396,238	3.51	1.91	40.31	-9.07
	Vegetables Provisionally Preserved (By Sulfur Dioxide Gas, In Brine Etc.), But Unsuitable In That State For Immediate Consumption (HS0711)	3,495	267	0	0.01	0	-92.36	0
9	**Canned food and Ready-to-Eat Meal (HS1604, HS2106)**	**4,529,936**	**5,491,933**	**3,507,783**	**0.42**	**0.51**	**21.24**	**48.02**
	Prepared Or Preserved Fish; Caviar And Caviar Substitutes Prepared From Fish Eggs (HS1604)	439,786	637,686	747,981	0.19	0.45	45.00	127.78
	Food preparations not elsewhere specified or included (HS2106)	4,090,151	4,854,246	2,759,802	0.5	0.54	18.68	35.19

10	**Vinegar and condiments (HS2209, HS2103)**	**3,340,845**	**3,933,458**	**1,670,166**	**3.65**	**2.11**	**17.74**	**-8.98**
	Vinegar And Substitutes For Vinegar Obtained From Acetic Acid (HS2209)	524,297	523,252	322,502	13.53	16.49	-0.20	31.92
	Sauces And Preparations Therefor; Mixed Condiments And Mixed Seasonings; Mustard Flour And Meal And Prepared Mustard, including pesto (HS2103)	2,816,549	3,410,206	1,347,664	3.28	1.77	21.08	-15.27
11	**Flour (HS1101, HS1102, HS1105)**	**1,235,669**	**1,609,146**	**799,129**	**1.66**	**1.26**	**30.22**	**8.76**
	Wheat Or Meslin Flour (HS1101)	1,226,815	1,597,562	791,974	2.23	1.69	30.22	8.89
	Cereal Flours Other Than Of Wheat Or Meslin (HS1102)	8,854	10,801	7,155	0.08	0.17	21.99	7.21
	Flour, Meal Flakes, Granules And Pellets Of Potatoes (HS1105)	0	783	0	0.01	0	0	-100
12	**Powdered milk, Other Products Consisting Of Natural Milk (HS040229, HS0404)**	**2,217,917**	**1,371,953**	**533,107**	**1.26**	**0.64**	**-38.14**	**-5.3**
	Other; Milk and cream, concentrated or containing added sugar or other sweetening matter (HS040229)	238	0	178	0	0	-100.00	0
	Whey, whether or not concentrated or containing added sugar or other sweetening matter; products consisting of natural milk constituents, whether or not containing added sugar or other sweetening matter, not elsewhere specified or included (HS0404)	2,217,680	1,371,953	532,928	1.27	0.65	-38.14	-5.33
13	**Truffles - Mushrooms And Truffles, Prepared Or Preserved Otherwise Than By Vinegar Or Acetic Acid (HS2003)**	**170,285**	**133,604**	120,913	**4.36**	**5.24**	**-21.54**	34.5
14	**Spreadable creamy (HS0401, HS0402, HS0403, HS0405)**	**200,897**	**56,177**	**50,644**	**0.01**	**0.01**	**-72.04**	**430.72**
	Milk And Cream, Not Concentrated Nor Containing Added Sweetening (HS0401)	157,399	409	0	0	0	-99.74	-100.00
	Milk And Cream, Concentrated Or Containing Added Sweetening (HS0402)	870	8,334	9,805	0	0	857.93	295.27
	Buttermilk, Curdled Milk And Cream, Yogurt, Kephir Etc., Whether Or Not Flavored Etc. Or Containing Added Fruit Or Cocoa (HS0403)	2,181	3,107	17,051	0.01	0	42.46	1,154.55
	Butter And Other Fats And Oils Derived From Milk (HS0405)	40,448	44,326	23,788	0.05	0.04	9.59	317.13

Source: Thailand Ministry of commerce

Import statistics and Customs Tariffs of top significant imported F&B products from Italy to Thailand

1. Wine

The winery market in Thailand is thriving. Urbanization after the pandemic recovery leads residents to socialize more, benefiting importers and distributors. The excise department announced a reduction of tax regulations for wine, fruit wine, and fermented liquor on 23 February 2024. In 2024, sales grew by 11.6% from 2023, reaching USD1,310.2 million. The market is experiencing steady growth, aiming for a 10.8% increase in 2025. It is led by Mont Clair, Jacob's Creek, and Penfolds with market shares of 26.3%, 9.6%, and 8.1%, respectively. Italian brands, Martini Bianco (0.7%), Canevel Valdobbiadene Prosecco (0.4%), and Oggi (0.1%), rank tenth, eleventh, and thirteenth.

In 2024, the total import value from the world to Thailand was USD134.63 million, encountering a growth of 12.17%. Italy ranks as the third largest supplier in the world, exporting wine with the amount of USD16.46 million to Thailand (12.23% SOM). This demonstrates the growth at 15.79% from the previous year. In the second quarter of 2025, the import amount of Italian winery products nearly doubled at USD9.8 million (14.1% SOM), showing 48.4% growth rate calculated from the same period as in 2024.

Harmonized Code & Taxation

HS Code 2204 : Wine of fresh grapes, including fortified wines; grape must other than that of heading 20.09.
(General Rate: Exempted / Ceiling Rate: 60%)

HS Code 2205 : Vermouth and other wine of fresh grapes flavoured with plants or aromatic substances.
(General Rate: Exempted / Ceiling Rate: 60%)

Import of Wine 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**121,063,614**	**120,025,724**	**134,632,280**	**60,068,874**	**69,607,419**	**100**	**100**	**100**	**-0.9**	**12.2**	**15.9**
1	**France**	37,254,829	36,078,049	48,425,708	18,494,763	24,187,846	30.1	36.0	34.7	-3.2	34.2	30.8
2	**Australia**	41,603,980	36,555,105	38,465,323	12,071,371	8,002,234	30.5	28.6	11.5	-12.1	5.2	-33.7
3	**Italy**	11,720,679	14,215,953	16,460,787	6,601,548	9,796,794	11.8	12.2	14.1	21.3	15.8	48.4
4	**USA**	10,689,854	11,690,964	11,187,886	4,684,777	7,368,864	9.7	8.3	10.6	9.4	-4.3	57.3
5	**Chile**	8,945,585	9,844,031	8,355,026	4,238,307	4,864,762	8.2	6.2	7.0	10.0	-15.1	14.8

Source: Ministry of Finance Thailand

2. Pastry and Snacks, Confectionery

The total import value of pastry, snacks and confectionery from the world in 2024 to Thailand is USD474.23 million, experiencing the growth of 6.15% from 2023. In the meantime, Italy ranks 6th with the export value to Thailand at USD15.25 million (3.22% SOM), having the growth rate of 10.18%. During January-June 2025, Italy accounted for USD7 million (2.5% SOM) export value to Thailand with a growth rate of 17.9% compared to the same period as in 2024.

In 2024, Thailand's **bakery market** is valued at approximately USD1.09 billion, with Le Pan holding around 20% market share. The market is growing at a 3.6% CAGR (2025–2027). The trends include rising demand for healthy and convenient products, the growth of artisan and specialty bakeries focusing on gluten-free/organic options, a 20% surge in online ordering in Bangkok, popularity of frozen bakery goods, and consumer preference for low-sugar, plant-based, and sustainable packaging solutions.

Confectionery falls under snack category in Thailand. This sector is driven based on consumers' trends in general. Entrepreneurs develop their products according to the trends that are going viral. Also, the collaboration between brands helps expanding the customer target and urging the sales amount. The whole sales market performance of snacks in Thailand in 2024 is USD3,215.1 million with the growth rate of 4.2%, targeting to rise by 6.5% growth rate in 2025. Lay's from the US occupies the most brand shares in Thailand with 9.4% following by Halls (3.2%), Jack 'n' Jill (3.0%), Tao Kae Noi (2.7%), Cornetto, the Italian brand (2.5%), and other brands mostly from Asian countries afterwards.

Harmonized Code & Taxation

HS Code 1704	: Sugar Confectionary (Including White Chocolate), Not Containing Cocoa *(General rate: 20% / Ceiling Rate: 60%)*
HS Code 1904	: Prepared foods obtained by the swelling or roasting of cereals or cereal products (for example, corn flakes); cereals (other than maize (corn)), in grain form or in the form of flakes or other worked grains (except flour, groats and meal), pre-cooked or otherwise prepared, not elsewhere specified or included. *(General rate: 20% / Ceiling Rate: 60%)*
HS Code 1905	: Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion wafers, empty cachets of a kind suitable for pharmaceutical use, sealing wafers, rice paper and similar products *(General rate: 30% / Ceiling Rate: 60%)*
HS Code 190531	: Sweet biscuits *(General rate: 20% / Ceiling Rate: 60%)*

Import of Snacks & Confectionery, pastry 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**461,417,715**	**504,425,651**	**530,600,135**	**241,905,549**	**279,843,473**	**100**	**100**	**100**	**9.3**	**5.2**	**15.7**
1	**Indonesia**	113,777,412	129,035,168	139,599,303	64,861,635	74,885,831	25.58	26.31	26.8	13.4	8.2	15.5
2	**China**	110,380,293	109,632,349	119,292,737	52,681,474	71,029,250	21.73	22.48	25.4	-0.7	8.8	34.8
3	**Malaysia**	98,279,707	108,220,882	106,835,038	49,560,243	54,555,467	21.45	20.14	19.5	10.1	-1.3	10.1
4	**Vietnam**	29,738,106	34,489,008	34,944,929	15,870,258	14,869,942	6.84	6.59	5.3	16.0	1.3	-6.3
5	**Japan**	14,147,121	15,675,173	17,407,714	8,565,051	7,070,788	3.11	3.28	2.5	10.8	11.1	-17.4
6	**Italy**	7,593,201	11,672,274	12,880,440	5,937,628	7,003,236	2.31	2.43	2.5	53.7	10.4	17.9

Source: Ministry of Finance Thailand

Import of Pastry 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**277,676,389**	**309,206,371**	**329,484,027**	**146,937,023**	**173,533,938**	**100**	**100**	**100**	**11.4**	**6.6**	**18.1**
1	**Indonesia**	84,425,743	94,918,951	104,277,734	48,008,675	55,874,464	30.7	31.6	32.2	12.4	9.9	16.4
2	**Malaysia**	84,921,403	94,692,876	92,076,371	42,639,637	45,460,507	30.6	27.9	26.2	11.5	-2.8	6.6
3	**China**	32,490,054	34,222,024	41,321,165	15,727,405	28,598,227	11.1	12.5	16.5	5.3	20.7	81.8
4	**Vietnam**	12,105,569	15,647,985	17,701,646	7,706,499	7,754,574	5.1	5.4	4.5	29.3	13.1	0.6
5	**Japan**	10,295,553	11,466,509	12,508,967	6,045,818	4,993,905	3.7	3.8	2.9	11.4	9.1	-17.4
6	**Italy**	7,036,325	10,987,416	12,286,496	5,623,939	6,695,983	3.6	3.7	3.9	56.2	11.8	19.1

Source: Ministry of Finance Thailand

3. Olive Oil

In 2024, the total import value of olive oil in Thailand is USD48.77 million, having the growth rate increased at 80.35% from 2023. Italy ranks second among the world with the export value to Thailand of USD13.92 million (28.56% SOM), accounting the growth rate for 63.17%. During the start of 2025, January to June, Italy, in a similar way, has a positive performance with the export value to Thailand of USD7.33 million (37.3% SOM), stepping on an incredible expansion, with a growth rate of 12.9% from 2024 in the same period.

The olive oil is categorized under edible oils market in Thailand. It is moving towards a steady growth since people are focusing more on the essential products that can be beneficial to their health and wellness despite its expensive price among other edible oil products. The whole sales of olive oil in Thailand in 2024 worth USD20.6 million, accounting for 6.3% growth rate from the previous year with a slight decrease forecasting to fall at 5.7% in 2025. Amidst the olive oil products in Thailand, Bertolli from Italy covers just over a half of brand shares at 53.88%. This marks a sign that international brands, especially Italian, have a strong potential to distribute the olive oil products to Thailand.

Harmonized Code & Taxation

HS Code 1509 : Olive oil and its fractions, whether or not refined, but not chemically modified.

(General Rate / Ceiling Rate: 7 THB per Liter (container contains no more than 30kg of total weight)

Import of Olive Oil 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	**2023**	**2024**	**2024** (Jan-Jun)	**2025** (Jan-Jun)	**2023**	**2024**	**2025** (Jan-Jun)	**2023**	**2024**	**2025** (Jan-Jun)
World		**23,269,923**	**27,043,016**	**48,771,422**	**25,999,940**	**19,670,906**	**100**	**100**	**100**	**16.2**	**80.3**	**-24.3**
1	**Spain**	13,367,960	16,875,111	30,973,093	17,186,563	10,766,609	62.4	63.5	54.7	26.2	83.5	-37.4
2	**Italy**	8,009,921	8,536,327	13,928,791	6,493,690	7,332,944	31.6	28.6	37.3	6.6	63.2	12.9
3	**Turkey**	409,568	537,996	2,405,265	1,297,646	913,372	2.0	4.9	4.6	31.4	347.1	-29.6
4	**Tunisia**	547,865	387,414	677,863	508,182	393,180	1.4	1.4	2.0	-29.3	75.0	-22.6
5	**Greece**	688,350	461,455	593,438	410,111	194,392	1.7	1.2	1.0	-33.0	28.6	-52.6

Source: Ministry of Finance Thailand

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4. Pasta

The total import value of Pasta in Thailand from the world worth USD79.08 million in 2024, growing at 19.39% from 2023. Italy contributes to the market, ranked second after South Korea, at the value of USD9.97 million (12.61% SOM), having a growth rate of 28.19%. In January-June 2025, the export value of Italy to Thailand for pasta increases to USD5.3 million (12.4% SOM), accounting for a slight growth rate at 7.4% from 2024 at the same time.

In 2024, Thailand's pasta market is valued at approximately USD 1.47 billion, with uncooked pasta imports reaching around USD 794 million. Dried pasta remains the most popular due to convenience and long shelf life. Leading imported brands include Barilla, Rummo from Italy and San Giorgio from USD, available in premium supermarkets and gourmet stores. Thai consumers are shifting toward healthier options such as whole grain, gluten-free, and low-sugar pasta. Ready-to-eat pasta meals are also growing, especially in urban areas. The market is expected to continue expanding with a CAGR of 4–6% through 2029, driven by innovation and health trends.

<u>Harmonized Code & Taxation</u>

HS Code 1902 : Pasta, whether or not cooked or stuffed (with meat or other substances) or otherwise prepared, such as spaghetti, macaroni, noodles, lasagne, gnocchi, ravioli, cannelloni; couscous, whether or not prepared.
(General Rate: 30% / Ceiling Rate: 60%)

Import of Pasta 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**60,509,621**	**66,244,155**	**79,086,505**	**34,879,120**	**42,835,856**	**100**	**100**	**100**	**9.48**	**19.39**	**22.8**
1	**South Korea**	35,076,625	37,214,044	44,641,441	20,288,953	22,873,538	56.18	56.45	53.4	6.09	19.96	12.7
2	**Italy**	7,295,031	7,781,539	9,974,897	4,953,869	5,319,685	11.75	12.61	12.4	6.67	28.19	7.4
3	**China**	2,135,612	3,815,640	6,703,321	1,521,108	5,049,162	5.76	8.48	11.8	78.67	75.68	231.9
4	**Indonesia**	5,237,624	5,153,917	6,166,128	3,306,952	2,514,374	7.78	7.8	5.9	-1.60	19.64	-24.0
5	**Japan**	4,598,363	4,717,290	4,784,277	2,330,969	2,237,889	7.12	6.05	5.2	2.59	1.42	-4.0

Source: Ministry of Finance Thailand

5. Non-Alcoholic Beverages

The significant contributors of the **non-alcoholic beverages** market in Thailand are **water, mineral water, soda and carbonated drinks, and energy drinks.** It grew to 4.5% growth rate in 2024 as consumers and socialization have returned to normal patterns and tourism, one of the main sectors that drive the economy of HoReCa has recovered. In 2025-2027, the industry is forecasted to reach 3.5-4.5% growth rate. In terms of brand shares, the big reputation brands – Singha, Crystal, and Nestle account for over 50% for bottled water, and Coke, Pepsi, and Fanta occupy over 70% for the carbonated drinks in this market.

On the other hand, Thailand's **coffee market** continues to grow in 2024, with total consumption reaching 46,000 tonnes in 2023 and a projected 2.8% CAGR through 2028. Coffee capsules and pods are key drivers, growing at ~6.7% CAGR. Italian brands like **Lavazza**, **Illy**, and **Segafredo Zanetti** lead the premium segment, with rising imports—roasted coffee from Italy grew 86% year-over-year. Thai consumers increasingly favor espresso, capsules, and single-origin blends. Café culture in Bangkok, Chiang Mai, and Chiang Rai further fuels demand. Italian coffee is widely distributed through premium supermarkets, cafés, and online platforms. The market outlook remains strong, driven by innovation and quality focus.

In 2024, the whole import value of non-alcoholic beverage from the world to Thailand worth USD671.39 million, accounting for 10.57% growth rate from 2023. Italy's export value to Thailand is USD8.66 million (1.29% SOM), rank tenth with the growth rate of 11.12%. Also, in 2025 (Jan-Jun), Italy's exportation value to Thailand decreased by -1.7% growth rate with the value of USD3.97 million (1.3% SOM) from 2024 in the same period.

<u>Harmonized Code & Taxation</u>

HS Code 2201	: Waters, including natural or artificial mineral waters and aerated waters, not containing added sugar or other sweetening matter nor flavoured; ice and snow. (*General Rate / Ceiling Rate: 2 THB per Liter)*
HS Code 2202	: Waters, including mineral waters and aerated waters, containing added sugar or other sweetening matter or flavoured, and other non-alcoholic beverages, not including fruit, nut or vegetable juices of heading 20.09. *(General Rate: 30% / Ceiling Rate: 60%)*
HS Code 09	: Coffee, whether or not roasted or decaffeinated; coffee husks and skins; coffee substitutes containing coffee in any proportion. *(The importation of coffee and tea into Thailand is subject WTO Agreement and provides for an ordinary duty of 90% + 7% VAT. There are, however, import quotas with a reduced duty of 30% + 7% VAT granted to licensed importers)*

Import of Non-Alcoholic Beverages Products 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**541,375,972**	**589,937,138**	**654,036,744**	**308,292,426**	**306,945,770**	**100**	**100**	**100**	**9.0**	**10.9**	**-0.4**
1	**Vietnam**	155,047,010	157,787,679	196,519,712	87,509,977	58,014,120	26.7	30.0	18.9	1.8	24.5	-33.7
2	**India**	154,837,886	168,557,647	150,805,279	87,354,206	73,028,200	28.6	23.1	23.8	8.9	-10.5	-16.4
3	**Indonesia**	25,989,994	55,138,982	69,260,318	13,601,741	52,112,330	9.3	10.6	17.0	112.2	25.6	283.1
4	**Laos**	33,274,735	39,103,099	61,217,083	31,331,065	40,298,181	6.6	9.4	13.1	17.5	56.6	28.6
5	**China**	66,653,349	64,308,648	57,231,152	29,886,792	23,963,672	10.9	8.8	7.8	-3.5	-11.0	-19.8
10	**Italy**	6,610,843	7,769,754	8,650,833	4,042,953	3,975,500	1.32	1.32	1.3	17.5	11.3	-1.7

Source: Ministry of Finance Thailand

6. Chocolate

Despite a four-year drop in sales volume up to 2024, Thailand's chocolate confectionery market experienced modest retail growth, driven by chocolate bar products. The market is shifting towards brand appeal and collaborations, such as KitKat x Nestlé, while health awareness and budgeting increasingly influence consumer choices.

In 2024, total sales reached USD243.2 million (3.0% growth), with boxed assortments and pouches leading in retail value and a 5.3% growth projected for 2025. KitKat leads brand share at 13.3%, followed by **Ferrero Rocher (10.2%),** Milo (6.8%), M&M's (6.5%), and Hershey's Nuggets (5.6%). Italian brands, notably Ferrero Rocher and **Kinder Bueno (3.4%),** collectively hold a strong presence, reflecting high brand recognition and trust among Thai consumers.

The import value of chocolate confectionery from the world to Thailand reached USD202.48 million in 2024, reflecting a 9.82% growth. Italy demonstrated its strength in this market by ranking 9th globally, exporting USD8.24 million worth of chocolate to Thailand (4.07% SOM), with a notable 27.88% growth. However, in first half of 2025 (Jan-Jun), Italy saw a dip, exporting USD2.5 million (2.2% SOM), a -23.6% decline growth rate compared to the same period in 2024.

Harmonized Code & Taxation

HS Code 1806 : Chocolate and other food preparations containing cocoa.
(General Rate: 10% / Ceiling Rate: 60%)

Import of Chocolate 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**176,433,732**	**184,379,866**	**202,488,318**	**85,644,512**	**111,952,187**	**100**	**100**	**100**	**4.50**	**9.82**	**30.72**
1	**Malaysia**	32,738167	33,791,655	34,739,369	14,332,132	19,735,013	18.33	17.16	16.73	3.22	2.80	37.7
2	**China**	22,259,866	29,125,055	33,472,212	11,211,891	14,209,080	15.8	16.53	13.09	30.84	14.93	26.73
3	**Singapore**	12,078,218	13,259,894	24,447,402	10,223,000	21,667,650	7.19	12.07	11.94	9.78	84.37	111.9
4	**USA**	24,486,492	17,852,102	15,176,689	7,778,831	7,227,736	9.68	7.5	9.08	-27.09	-14.99	-7.08
5	**Indonesia**	12,887,636	11,900,992	11,407,244	4,614,981	6,662,501	6.46	5.63	5.39	-7.66	-4.15	44.37
9	**Italy**	9,541,925	6,449,132	8,247,058	3,211,614	2,451,771	3.5	4.07	2.19	-32.41	27.88	-23.66

Source: Ministry of Finance Thailand

7. Cheese

As Western food becomes more popular in Thailand, people embrace more products and cuisines made from cheese. Foodservice plays a vital role in expanding the cheese market. A variety of local and international brands provide options that cater to different preferences and budgets, making the market highly competitive as rapid growth allows entrepreneurs to enter more easily.

In 2024, the total sales value of the cheese market reached USD78.6 million, showing a 6.7% growth from 2023 and expected to grow by 6.3% in 2025. Allowrie holds the largest brand share at 25.9%, followed by Emborg (10.4%), Président (9.0%), Kraft Singles (8.3%), and Mainland (8.0%). Leading imported Italian cheese brands in Thailand include **Zanetti, Galbani, Parmigiano Reggiano DOP, and Ambrosi.**

In 2024, Thailand imports more amount of cheese from the world, reached 9.27% growth rate with the value of USD130.01 million. Italy ranks fourth with the value of USD8.1 million (6.29% SOM), representing 2.5% growth rate from 2023. During January-June 2025, Italy export amount grows with the amount of USD2.28 million (5.95% SOM) to Thailand, accounting for 6.01% growth rate from the same period as in 2024.

Harmonized Code & Taxation

HS Code 0406 : Cheese and curd
(General Rate: 30% / Ceiling Rate:60%)

Import of Cheese 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**105,653,894**	**118,985,248**	**130,018,661**	**65,038,416**	**75,983,129**	**100**	**100**	**100**	**12.62**	**9.27**	**16.8**
1	**Australia**	30,025,842	34,408,825	42,316,347	21,962,886	23,511,566	28.92	32.55	30.94	14.60	22.98	7.1
2	**New Zealand**	37,876,677	35,665,748	39,904,877	20,564,418	21,918,110	29.98	30.69	28.85	-5.84	11.89	6.6
3	**USA**	8,948,744	9,038,535	8,929,329	5,017,553	6,913,246	7.6	6.87	9.10	1.00	-1.21	37.8
4	**Italy**	5,674,314	7,975,649	8,175,233	3,897,208	5,464,817	6.7	6.29	7.19	40.56	2.50	40.2
5	**France**	4,673,935	5,841,661	6,124,989	2,862,433	3,234,087	4.91	4.71	4.26	24.98	4.85	13.0

Source: Ministry of Finance Thailand

8. Canned Vegetable Preserves

In 2024, Thailand imported Canned Vegetable, including tomatoes sauce products globally with the value of USD69.91 million, reflecting -6.67% growth from 2023. Italy presents as the second largest country exporting to Thailand, growing 22.88% at USD5.61 million (8.03% SOM). In 2025 (Jan-Jun), Italy dipped into a decrease at -12.5% growth rate, worth USD2.23 million (7.38% SOM) compared to 2024 during the same period.

In 2024, Thailand's market for preserved and ready-to-eat vegetables is estimated at **USD340 million**. While exact segmentation is limited, growth is driven by demand for convenient, health-oriented products that offer global flavors. Consumers favor options like marinated artichokes, sun-dried tomatoes, olives, and mixed antipasti, available in **jars, pouches, and canned formats** across supermarkets, convenience stores, and e-commerce. Italian imports brands particularly **Ponti** and **Menu**, stand out by offering premium Mediterranean selections. This trend aligns with rising incomes, urban lifestyles, and interest in authentic international cuisine in Thai households and HoReCa sectors.

Tomato-based pasta sauces in Thailand are part of the **USD 2.3 billion** condiment market, expected to reach **USD 3.55 billion by 2030** (CAGR ~7.5%). Demand continues to grow, fueled by urbanization and Western food trends. Thai consumers now seek **premium**, **organic**, and **imported** options with clean labels and ready-to-use convenience. Italian brands like **Barilla**, **Mutti**, **CIRIO**, and **De Cecco** are popular in gourmet supermarkets and online platforms. These sauces, often made with 100% Italian tomatoes, offer robust flavors and authenticity, making them favorites for both home cooks and fine-dining chefs.

Harmonized Code & Taxation

HS Code 2002	: Tomatoes prepared or preserved otherwise than by vinegar or acetic acid.
HS Code 2005	: Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen, other than products of heading 20.06. *(General Rate: 30% / Ceiling Rate: 60%)*
HS Code 0711	: Vegetables provisionally preserved, but unsuitable in that state for immediate consumption. *(General Rate: 40% / Ceiling Rate: 60%)*

Import of Canned Vegetable Preserves 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
World		**57,541,705**	**74,913,181**	**69,915,893**	**34,742,318**	**30,320,895**	**100**	**100**	**100**	**30.19**	**-6.67**	**-12.73**
1	**China**	32,196,468	44,610,876	34,404,044	18,115,016	13,961,952	59.55	49.21	46.05	38.56	-22.88	-22.93
2	**Italy**	2,761,469	4,567,881	5,613,025	2,555,283	2,236,709	6.1	8.03	7.38	65.41	22.88	-12.47
3	**Vietnam**	3,196,244	4,086,802	4,404,603	1,859,981	2,139,925	5.46	6.3	7.06	27.86	7.78	15.05
4	**Germany**	1,592,061	2,960,662	4,400,873	2,336,109	2,130,377	3.95	6.3	7.03	85.96	48.64	-8.81
5	**USA**	3,214,084	3,014,600	4,136,234	1,760,085	1,972,943	4.02	5.92	6.51	-6.21	37.21	12.09

Source: Ministry of Finance Thailand

9. Canned Food, Ready-to-Eat Meal, and Caviar

Thailand's import value of canned food and ready-to-eat meal from the world worth USD675.67 million, accounting for 19% growth in 2024. Italy's exportation to Thailand of this category is demonstrating a continued advancement at USD4.85 million (0.5% SOM) with 18.7% growth rate. During January-June 2025, the export value from Italy worth USD2.75 million (0.55% SOM), reflecting a growth at 35.2% from 2024 during the same period.

Thailand's **canned food and ready-to-eat meal market** continues growing, valued at over USD 2.3 billion combined. Canned food alone is projected to reach USD314 million by 2028, driven by convenience, rising incomes, and small households. Popular items include seafood, fruits, vegetables, and meats. Ready-to-eat meals worth USD 2 billion, include shelf-stable, frozen, and instant options, with strong presence in convenience stores and online. Health trends boost demand for clean-label and plant-based meals. Imported Italian products, like canned tomatoes and pasta meals (e.g., **Mutti**, **Menu**), are increasingly found in premium supermarkets and gourmet outlets across urban Thailand.

Harmonized Code & Taxation

HS Code 2106 : Food preparations not elsewhere specified or included.
(General Rate: 5% / Ceiling Rate: 60%)

HS Code 1604 : Prepared or preserved fish; caviar and caviar substitutes prepared from fish eggs
(General Rate: 20% / Ceiling Rate: 60%)

Import of Canned Food and Ready-to-Eat Meal 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	**2023**	**2024**	**2024** (Jan-Jun)	**2025** (Jan-Jun)	**2023**	**2024**	**2025** (Jan-Jun)	**2023**	**2024**	**2025** (Jan-Jun)
	World	**884,857,323**	**819,802,092**	**975,676,235**	**472,079,993**	**498,613,019**	**100**	**100**	**100**	**-7.35**	**19.01**	**5.62**
1	Singapore	269,023,266	284,025,346	342,331,139	183,280,140	141,061,907	34.65	35.09	28.29	5.58	20.53	-23.03
2	United States	166,831,500	108,407,191	138,108,239	66,405,165	61,207,814	13.22	14.16	12.28	-35.02	27.40	-7.83
3	China	83,164,802	85,484,942	105,081,620	42,390,415	62,257,811	10.43	10.77	12.49	2.79	22.92	46.87
4	Vietnam	71,000,521	56,132,261	83,274,298	40,107,084	63,834,708	6.85	8.54	12.80	-20.94	48.35	59.16
5	Malaysia	66,295,549	64,281,186	63,733,192	31,489,690	30,748,914	7.84	6.53	6.17	-3.04	-0.85	-2.35
19	**Italy**	6,046,452	4,090,151	4,854,246	2,041,424	2,759,802	0.50	0.50	0.55	-32.35	18.68	35.19

Source: Ministry of Finance Thailand

Thailand's **caviar market** is valued at around USD 31 million in 2024, expected to grow to USD 42 million by 2027 (5.8% CAGR). Demand is driven by luxury dining and tourism. Premium **Italian brands** such as **Caviar Giaveri**, **Calvisius**, **Adamas**, and **Ars Italica** are available through gourmet retailers and importers in Bangkok.

The import value of caviar from the world to Thailand worth USD345.6 million, accounting for 17.6% growth in 2024. Italy's exportation to Thailand of this category is demonstrating a continued advancement at USD637,686 (0.2% SOM) with 45% growth rate. During January-June 2025, the export value from Italy worth USD747,981 (0.2% SOM), reflecting a huge growth at 127.8% from 2024 during the same period.

Import of Caviar 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	**2023**	**2024**	**2024** (Jan-Jun)	**2025** (Jan-Jun)	**2023**	**2024**	**2025** (Jan-Jun)	**2023**	**2024**	**2025** (Jan-Jun)
	World	**292,136,547**	**293,703,903**	**345,604,954**	**157,194,714**	**187,036,109**	**100**	**100**	**100**	**0.54**	**17.67**	**18.98**
1	China	136,670,670	149,300,970	200,098,226	95,808,549	112,872,807	50.83	57.90	60.35	9.24	34.02	17.81
2	Indonesia	71,151,183	68,022,750	85,174,734	37,299,213	37,380,468	23.16	24.65	19.99	-4.40	25.22	0.22
3	Vietnam	55,194,085	47,508,875	36,946,521	12,978,125	22,254,551	16.18	10.69	11.90	-13.92	-22.23	71.48
4	Japan	15,762,922	12,227,414	11,979,999	5,705,386	7,982,763	4.16	3.47	4.27	-22.43	-2.02	39.92
5	Malaysia	6,632,793	6,214,857	4,489,532	2,632,591	878,713	2.12	1.30	0.47	-6.30	-27.76	-66.62
7	**Italy**	318,584	439,786	637,686	328,378	747,981	0.15	0.18	0.40	38.04	45.00	127.78

Source: Ministry of Finance Thailand

10. Vinegar and Condiments

Thailand's **vinegar** market, encompassing balsamic, culinary, and specialty types, is growing steadily. The balsamic vinegar segment alone reached **USD9.27 billion in 2024** and is expected to grow 2.5% CAGR. The leading Italian brands includes **Ponti**, **Filippo Berio**, **Bertolli**, **Monini**, and **Casa Rinaldi**—offering balsamic vinegar, wine vinegars, and gourmet condiments in premium supermarkets. Rising demand is driven by health trends, global cuisine popularity, and e-commerce growth.

On the other hand, Thailand's sauces & condiments market was valued at approximately **USD 2.3 billion in 2024**, growing at around 7.5% CAGR to 2029. Core categories include soy sauce, fish sauce, chili sauce, ketchup, mustard, and seasoning pastes. Local giants like **Healthy Boy (Yan Wal Yun)** dominate soy and fish sauces, holding 82% market share. Imported **Italian condiment** brands such as **Mutti**, **Cirio**, **Bertolli**, and **Saclà** appear in premium channels, offering tomato-based sauces, pestos, and spice blends. Growth is driven by urban lifestyles, international cuisines, and e-commerce expansion.

The total import value of Vinegar and Condiments of Thailand from the world is accounting for USD107.71 million, grew 3.03% in 2024. Italy exported with the value of USD3.93 million (3.65% SOM) to Thailand, reflecting 17.74% growth rate. However, the export value from Italy in 2025 (Jan-Jun) declined at -9%, worth USD1.67 million (2.8% SOM) when calculating from the same period in 2024.

Harmonized Code & Taxation

HS Code 2209	: Vinegar and substitutes for vinegar obtained from acetic acid. *(General Rate: Exempted / Ceiling Rate : 60%)*
HS Code 2103	: Sauces and preparations therefor; mixed condiments and mixed seasonings; mustard flour and meal and prepared mustard. *(General rate: 30% / Ceiling rate: 60%)*

Import of Vinegar and Condiments 2022-2024; 2024-2025 (Jan-Jun) – Value (USD) USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**112,398,088**	**104,544,216**	**107,711,466**	**50,936,519**	**58,067,505**	**100**	**100**	**100**	**-6.99**	**3.03**	**14.0**
1	**Japan**	26,181,402	24,498,995	25,955,055	12,237,671	15,499,818	23.43	24.1	26.69	-6.43	5.94	26.66
2	**Singapore**	14,423,337	13,675,211	14,462,366	6,424,248	8,264,850	13.08	13.43	14.23	-5.19	5.76	28.65
3	**Malaysia**	7,792,169	9,251,182	11,238,431	5,087,769	5,628,739	8.85	10.43	9.69	18.72	21.48	10.63
4	**South Korea**	11,464,427	9,190,264	10,904,993	4,673,689	6,306,416	8.79	10.12	10.86	-19.84	18.66	34.93
5	**China**	19,157,693	16,493,272	9,675,484	5,624,719	4,430,758	15.78	8.98	7.63	-13.91	-41.34	-21.23
8	**Italy**	2,959,522	3,340,845	3,933,458	1,834,956	1,670,166	3.2	3.65	2.88	12.88	17.74	-8.98

Source: Ministry of Finance Thailand

11. Flours

Thailand's **cooking and baking flour market** is robust, driven by steady demand in foodservice and household sectors. While Thailand-specific figures aren't widely published, the Asia-Pacific flour industry is valued at approximately USD38.2 billion in 2024 and is growing at around 6% CAGR through 2031. In Thailand, top local millers like King Milling and Siam Flour dominate traditional wheat flour supply. Among **Italian premium brands**, **Caputo, Le 5 Stagioni, Molino Grassi, and Molino Spadoni** are preferred by artisan bakers, pizzerias, and pastry chefs for specialty productions, reflecting a trend toward high-quality, Western-style baking and pizza-making.

In 2024, Thailand imported less flour globally, with the total import value reaching USD96.69 million, -11.46% decrease from 2023. However, Italy did not follow this downward trend. Italian exports to Thailand reached USD1.6 million (1.66% SOM), representing a 30.22% growth. In early 2025 (Jan-Jun), Italy's export value to Thailand continued to rise, reaching USD799,129 (1.5% SOM), an increase of 8.8% compared to the same period in 2024.

Harmonized Code & Taxation

HS Code 1101	: Wheat or meslin flour *(General Rate: 5%, THB0.500/kg / Ceiling Rate: 40%, THB2.750/kg)*
HS Code 1102	: Cereal flours other than of wheat or meslin. *(General Rate: 20%, THB1.37/kg / Ceiling Rate: 40%, THB2.750/kg)*
HS Code 1105	: Flour, meal, powder, flakes, granules and pellets of potatoes. *(General Rate: 20%, / Ceiling Rate: 40%)*

Import of Flours 2022-2024; 2024-2025 (Jan-Jun) – Value (USD) USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**110,548,402**	**109,209,587**	**96,698,914**	**48,486,411**	**53,785,111**	**100**	**100**	**100**	**-1.21**	**-11.46**	**10.9**
1	**Vietnam**	47,345,260	49,043,783	43,689,890	20,969,437	25,188,182	44.91	45.18	46.83	3.59	-10.92	20.12
2	**India**	3,018,108	4,177,362	6,956,517	2,512,030	5,916,082	3.83	7.19	11.00	38.41	66.53	135.51
3	**UK**	7,563,046	6,561,278	6,667,172	2,955,764	3,066,175	6.01	6.9	5.70	-13.25	1.61	3.74
4	**Singapore**	8,009,067	7,425,803	5,308,103	2,952,321	2,245,606	6.8	5.49	4.18	-7.28	-28.52	-23.94
5	**Australia**	4,328,949	4,780,604	5,209,125	2,807,378	3,031,447	4.38	5.39	5.64	10.43	8.96	7.98
12	**Italy**	837,354	1,235,669	1,609,146	734,767	799,129	1.13	1.66	1.49	47.57	30.22	8.76

Source: Ministry of Finance Thailand

12. Powdered Milk, Other Products Consisting of Natural Milk

The milk market in Thailand is expanding as health and wellness trends drive higher demand for dairy. While many local producers supply the market, imports continue to grow. In 2024, Thailand's whole powdered milk market was valued at about USD 258 million, up 3.3% YoY. Broader milk powder categories, including infant formulas and dairy whiteners, remain in demand for food service, baking, and beverages, supported by urbanization, convenience, and rising dairy consumption. Italian dairy brands have limited presence, though MEC3 is recognized for premium milk powder for gelato and dessert pastes, favored by artisan bakers and specialty beverage makers in Thailand.

In 2024, Thailand's total import value from the world reached USD21.12 million, reflecting a 3.19% growth. Italy exported a minimal amount at USD474 (1.26% SOM), marking a decline of -38.14%. However, in early 2025 (Jan-Jun), Italy's exports to Thailand surged to USD553,107 (0.8% SOM), decreasing -5.3% compared to same period, previous year.

<u>Harmonized Code & Taxation</u>

HS Code 040229 : Other; Milk and cream, concentrated or containing added sugar or other sweetening matter
(General rate: 18% (For Powdered Milk), 5% (Others) / Ceiling Rate: 25%)

HS Code 0404 : Whey, whether or not concentrated or containing added sugar or other sweetening matter; products consisting of natural milk constituents, whether or not containing added sugar or other sweetening matter, not elsewhere specified or included.
(General Rate: 5% / Ceiling Rate: 40%)

Import of Products Consisting of Natural Milk 2022-2024; 2024-2025 (Jan-Mar) – Value (USD,%)

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**127,033,516**	**105,670,998**	**109,044,633**	**53,962,168**	**64,871,401**	**100**	**100**	**100**	**-16.82**	**3.19**	**20.22**
1	**France**	21,863,657	17,091,929	17,960,175	9,000,961	7,937,172	16.18	16.47	12.24	-21.82	5.08	-11.82
2	**USA**	25,556,100	18,685,129	15,144,270	7,310,100	7,905,005	17.68	13.89	12.19	-26.89	-18.95	8.14
3	**New Zealand**	5,836,094	4,996,080	10,894,443	4,594,540	11,095,732	4.73	9.99	17.10	-14.39	118.06	141.50
4	**Germany**	13,194,069	12,821,701	10,713,307	5,412,689	6,298,929	12.13	9.83	9.71	-2.82	-16.44	16.37
5	**Poland**	11,002,127	6,787,763	10,671,442	6,141,737	5,578,589	6.42	9.79	8.60	-38.30	57.22	-9.17
14	**Italy**	1,055,152	2,217,917	1,371,953	562,947	533,107	2.1	1.26	0.82	110.20	-38.14	-5.3

Source: Ministry of Finance Thailand

13. Truffles

In 2024, Thailand's truffle market remains niche and modest, estimated at **around USD 39 million**, reflecting a -7–10% YoY decline **due to high prices and limited local awareness**. Demand is mainly from luxury hotels, fine dining, and gourmet retailers. Leading Italian truffle brands including **Urbani Tartufi**, **Truffleat** and **Sabatino Tartufi** are the most recognized, offering premium black and white truffles to top Bangkok establishments. Market contraction stems from global supply shortages and high inflation in Asia, though culinary interest remains intact among high-end consumers.

In 2024, Thailand imported truffles from the world valued at USD1.03 million, marking a -30.2% decrease from the previous year. Italy ranked third among exporters, with a total export value to Thailand of USD32.4 thousand (4.36% SOM), reflecting a -21.54% decline. However, in early 2025 (Jan–Jun), Italy's truffle exports to Thailand saw a strong rebound, rising by 34.5% to USD120,931 (4.5% SOM) compared to the same period of 2024.

Harmonized Code & Taxation

HS Code 2003 : Mushrooms and truffles, prepared or preserved otherwise than by vinegar or acetic acid
(General Rate: 30%, THB25/kg / Ceiling Rate: 60%, THB50/kg)

Import of Truffles 2022-2024; 2024-2025 (Jan-Mar) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**5,849,198**	**4,394,717**	**3,067,571**	**1,724,797**	**2,680,429**	**100**	**100**	**100**	**-24.87**	**-30.20**	**55.41**
1	**China**	4,632,392	3,967,800	2,724,734	1,574,131	2,460,936	90.29	88.82	91.8	-14.35	-31.33	56.34
2	**Australia**	872,689	40,057	136,613	47,812	90,691	0.91	4.45	3.38	-95.41	241.05	89.68
3	**Italy**	212,394	170,285	133,604	89,901	120,931	3.88	4.36	4.51	-19.83	-21.54	34.52
4	**USA**	1,200	184,278	40,832	2,242	1,275	4.19	1.33	0.05	15256.50	-77.84	-43.13
5	**France**	83,211	15,157	20,067	4,257	9,688	0.35	0.65	0.36	-81.78	32.39	127.58

Source: Ministry of Finance Thailand

14. Spreadable Creamy

In 2024, Thailand's spreadable creamy market, including butter blends, cheese spreads, and dessert pastes, maintains a niche value of around **USD120 million**, with modest growth driven by bakery, café, and artisan foodservice demand. The segment has slightly expanded +2–3% YoY, supported by rising home baking trends and café culture embracing specialty spreads. Presences Italian brands available in Thailand regarding spreadable creamy are for examples **Pariani, Nutella**, **MEC3** (gelato and dessert pastes), etc. favored by pastry chefs and gelato artisans for high quality and consistency. The market remains selective but stable, with premium usage in HoReCa.

In 2024, Thailand's import value from the world totaled USD606.73 million, reflecting a -3.52% decline from 2023. Italy exported a relatively small amount to Thailand, valued at USD56.1 thousand (0.01% SOM), showing a sharp decrease of -72.04%. However, in early 2025 (Jan–Jun), Italy's exports to Thailand rose to USD50,644 (0.01% SOM), representing a significant growth rate of 409% compared to the same period in 2024.

<u>Harmonized Code & Taxation</u>

HS Code 0401	: Milk and cream, not concentrated nor containing added sugar or other sweetening matter. *(General rate: Exempted / Ceiling Rate: 40%)*
HS Code 0402	: Milk and cream, concentrated or containing added sugar or other sweetening matter. *(General rate: 5% / Ceiling Rate: 25%)*
HS Code 0403	: Yogurt; buttermilk, curdled milk and cream, kephir and other fermented or acidified milk and cream, whether or not concentrated or containing added sugar or other sweetening matter or flavoured or containing added fruit, nuts or cocoa. *(General rate: 30% / Ceiling Rate: 40%)*
HS Code 0405	: Butter and other fats and oils derived from milk; dairy spreads. *(General rate: 30% / Ceiling Rate: 60%)*

Import of Spreadable Creamy Products 2022-2024; 2024-2025 (Jan-Jun) – Value (USD)

USD, %

No.	Country	Value: USD					Share (%)			Growth rate (%)		
		2022	2023	2024	2024 (Jan-Jun)	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)	2023	2024	2025 (Jan-Jun)
	World	**722,049,483**	**628,881,311**	**606,735,273**	**324,812,385**	**404,254,555**	**100**	**100**	**100**	**-12.90**	**-3.52**	**24.5**
1	**New Zealand**	461,397,531	420,629,095	377,414,854	213,714,418	263,508,933	66.89	62.2	65.18	-8.84	-10.27	23.30
2	**Australia**	87,188,050	59,283,320	87,436,964	43,812,926	54,766,003	9.43	14.41	13.55	-32.01	47.49	25.00
3	**USA**	50,118,560	41,118,586	43,469,681	29,754,135	18,914,374	6.54	7.17	4.68	-17.96	5.72	-36.43
4	**Netherlands**	24,841,495	19,337,968	19,844,292	5,523,392	8,140,348	3.08	3.27	2.01	-22.15	2.62	47.38
5	**Belgium**	30,181,304	16,846,332	16,627,418	10,371,876	9,380,158	2.68	2.74	2.32	-44.18	-1.30	-9.56
28	**Italy**	129,455	200,897	56,177	9,952	50,644	0.03	0.01	0.01	55.19	-72.04	408.8

Source: Ministry of Finance Thailand

<u>Additional category</u>

Meat, processed and preserved meat

Regarding the restriction of charcuterie products import from Italy to Thailand, the import amount of processed and preserved meat is drastically decreasing since the beginning of 2022.

The officer from Division of Veterinary Inspection and Quarantine that responsible for this issue mentioned that the Royal Gazette on the Announcement of the Department of Livestock Development on Delaying the importation or transit through the kingdom of pigs, wild boars or carcasses of pigs, carcasses of wild boars from the Republic of Italy 2022 is still in active, extended 90 days from May 8, 2023 onwards. (see appendix 1)

Therefore, the commercial import of charcuterie products from Italy to Thailand is **<u>not permitted at present</u>**. In exceptional cases (e.g. sample imports for trade fairs, exhibitions, or laboratory analysis), importers must submit a request to the Department of Livestock Development (DLD) for approval on a case-by-case basis.

Contact point: **Division of Veterinary Inspection and Quarantine, DLD**
Email: aqidata@dld.go.th
Tel: +66-2-501-3473

Harmonized Code & Taxation

HS Code 02030000	: Meat of swine, fresh, chilled or frozen - - Hams, shoulders and cuts thereof, with bone in *(General rate 30%; Ceiling rate 60% + VAT 7%)*
HS Code 02100000	: Meat and edible meat offal, salted, in brine, dried or smoked; edible flours and meals of meat or meat offal *(General rate 30%; Ceiling rate 60% + VAT 7%)*
HS Code 02101100	: Meat and edible meat offal, salted, in brine, dried or smoked; edible flours and meals of meat or meat offal - - Hams, shoulders and cuts thereof meat of swine, with bone in *(General rate 30%; Ceiling rate 60% + VAT 7%)*
HS Code 16010000	: Sausages and similar products, of meat, meat offal, blood or insects; food preparations based on these products. (General rate 30%; Ceiling rate 60% + VAT 7%)
HS Code 39173210	: Tubes, pipes and hoses, and fittings therefor (for example, joints, elbows, flanges), of plastics - - Other, not reinforced or otherwise combined with other materials, without fittings - - - Sausage or ham casings *(General rate 5%; Ceiling rate 40% + VAT 7%)*

General Food Import Procedure

A general food import procedure involves obtaining the necessary **import license** from the importing country's authority, such as the Thai Food and Drug Administration (FDA), registering as an importer, notifying the destination country's authorities of your shipment, preparing and submitting required documents like health certificates, and clearing customs by paying applicable duties. Specifics vary significantly by country, requiring adherence to national food safety laws and regulations.

1. Licensing & Registration

- **Obtain an Import License:** Secure a food import license from the importing country's governing body, such as the FDA in Thailand.

- **Register as an Importer:** Register your business and premises to comply with local import criteria.

- **Register Products:** Register your specific food products on the relevant authorities' platforms, like the FDA in Thailand.

2. Pre-Shipment Notification

- **Submit Prior Notice:** For countries like the U.S. and Japan, you must submit a Prior Notice to the FDA or relevant quarantine station before your food arrives to allow for inspection and targeting.

- **Provide Shipment Details:** The notification requires details such as the product's name, description, origin, manufacturer, and intended use.

3. Documentation

- **Required Documents:** Ensure your consignment is accompanied by official documents and certificates.

- **Health Certificates:** A health certificate issued by a competent authority in the country of origin, attesting to compliance with the destination country's requirements, is often essential.

- **Other Certifications:** Depending on the food type, you may need a Halal certificate, or a sanitary certificate for specific items like raw meat or poultry.

4. Customs & Clearance

- **Customs Declaration:** File a customs declaration and other necessary forms to initiate the customs clearance process.

- **Duty Payments:** Determine and pay the correct import duty rates for your products.

- **Customs Broker:** Consider using a licensed customs broker to navigate the process and transmit shipment data electronically.

5. Inspections & Compliance

- **Quarantine Station Inspection:** Imported food is subject to examination at quarantine stations to ensure safety and compliance with food laws.

- **Product Labeling:** Verify that your food product labels comply with the destination country's labeling laws and regulations.

- **Food Safety Regulations:** Always ensure your imported products meet all relevant food safety regulations of the destination country.

Required License: Excise Department

Products under this category: Wine (HS2204, HS2205) and alcoholic beverages products

- Authority: Excise Department
- License: Excise Import License (Alcohol)
- Notes: Excise label approval is mandatory
- Excise registration (Thai importer with company registered required)
  - o Importer applies via Excise online system (Link available) or at the Excise Area Office.
  - o Submit:
    - o Import License application
    - o Product information (alcohol content, origin, HS code)
    - o Label in Thai (for Excise approval – "Excise Stamp/Sticker")
    - o Invoice & packing list
    - o Certificate of Origin (if applicable)
  - o Pay excise duties + VAT + other taxes.
  - o **Outcome:** Excise Import License + approved excise label/stamp.

Required License: Thai FDA (Food Division)

- Authority: Thai FDA
- License: FDA Food Import License
- Procedures for submitting FDA request
- FDA registration (Thai importer with company registered required)
  - o **e-Submission** via FDA e-Portal: https://food.fda.moph.go.th.
  - o Submit:
    - o Application form (via portal)
    - o Product details + formulation
    - o Label (Thai language) for approval
    - o Certificate of Free Sale (CFS) or Health Certificate from exporting country
  - o **FDA review** → If compliant, approval is issued.
  - o **Outcome:** FDA Food Import License + product notification/standard food registration

Products under this category: 2. Snacks & Confectionery, Pastry (HS1704, HS1904, HS1905, HS190531) - *Notes: Registration under "Standard food" or "Notification food" depending on category;* 3. Olive Oil (HS1509) - *Notes: Nutrition labelling required;* 4. Pasta (HS1902); 5. Non-Alcoholic Beverages (HS2201, HS2202, HS220299, HS09); 6. Chocolate (HS1806); 7. Cheese (HS0406); 8. Canned Vegetable Preserves

(HS2002, HS2005, HS0711); 9. Canned Food & Ready-to-Eat Meal (HS1604, HS2106) - *Notes: For fish/seafood products, additional clearance may be required from the **Department of Fisheries**;* 10. Vinegar & Condiments (HS2209, HS2103); 11. Flour (HS1101, HS1102, HS1105); 13. Truffles (HS2003)

<u>Required License</u>: Thai FDA + Department of Foreign Trade (DFT)

<u>Products under this category</u>: 12. Powdered Milk & Other Milk Products (HS040229, HS0404); 15. Spreadable Creamy Dairy Products (HS0401, HS0402, HS0403, HS0405)

Since these products are under **import control measures for economic security reasons**, import requires dual approval: technical/food safety from FDA and trade authorization from DFT.

- Authorities: Thai FDA + DFT
- Licenses:
    - FDA Food Import License
    - Import License (MOC/DFT) – required under the Notification of Ministry of Commerce (No. 39) B.E. 2527 (1984) and its amendments.
- DFT import permission procedure
    - Apply through the Ministry of Commerce **e-Licensing system**: https://ilicensing.dft.go.th and submit:
      - Import License application form
      - Trade documents (Invoice, Packing list, B/L or AWB)
      - Certificate of Analysis or Sanitary Certificate (if required)
      - Certificate of Free Sale (if required)
    - DFT reviews under **Notification of MOC (No. 39/1984)**.
    - **Outcome:** Import License (valid for specific shipment/period).

References:

Euromonitor

Ministry of Finance Thailand (TDM)

Krungsri Research

United States Department of Agriculture

Source of Asia

6Wresearch

Thai Customs Department

Food and Drug Administration (FDA)

Appendix

(DLD Announcement od delay in pork imports from Italy as of 22 July 2025)

หน้า ๓๕
เล่ม ๑๔๒ ตอนพิเศษ ๒๕๒ ง ราชกิจจานุเบกษา ๒๒ กรกฎาคม ๒๕๖๘

ประกาศกรมปศุสัตว์

เรื่อง ชะลอการนำเข้าหรือนำผ่านราชอาณาจักรซึ่งสุกร หมูป่า หรือซากสุกร ซากหมูป่า
จากสาธารณรัฐอิตาลี
พ.ศ. ๒๕๖๘

สืบเนื่องจากประกาศกรมปศุสัตว์ เรื่อง ชะลอการนำเข้าหรือนำผ่านราชอาณาจักรซึ่งสุกร หมูป่า หรือซากสุกร ซากหมูป่า จากสาธารณรัฐอิตาลี พ.ศ. ๒๕๖๘ ลงวันที่ ๒ เมษายน ๒๕๖๘ ประกาศในราชกิจจานุเบกษา เมื่อวันที่ ๙ เมษายน ๒๕๖๘ มีผลใช้บังคับได้เป็นระยะเวลาเก้าสิบวันนับตั้งแต่วันถัดจากวันประกาศในราชกิจจานุเบกษา สิ้นสุดการใช้บังคับในวันที่ ๙ กรกฎาคม ๒๕๖๘ แต่อย่างไรก็ตาม ยังมีรายงานการระบาดของโรคอหิวาต์แอฟริกาในสุกร (African Swine Fever : ASF) ในพื้นที่ของสาธารณรัฐอิตาลี จากองค์การสุขภาพสัตว์โลก (World Organisation for Animal Health : WOAH) ซึ่งโรคระบาดดังกล่าวสามารถแพร่กระจายไปอย่างกว้างขวางได้ โดยมีสาเหตุสำคัญมาจากการเคลื่อนย้ายสัตว์ป่วยหรือสัตว์ที่เป็นพาหะนำโรคหรือซากของสัตว์ซึ่งป่วยหรือตายโดยโรคระบาดดังกล่าวไปยังท้องที่ต่าง ๆ และเพื่อเป็นการป้องกันไม่ให้โรคระบาดดังกล่าวแพร่กระจายเข้ามา ซึ่งจะส่งผลกระทบต่อการเลี้ยงสุกรและหมูป่าในประเทศ

อาศัยอำนาจตามความในมาตรา ๖ วรรคหนึ่ง และมาตรา ๓๓ แห่งพระราชบัญญัติโรคระบาดสัตว์ พ.ศ. ๒๕๕๘ อธิบดีกรมปศุสัตว์ จึงออกประกาศไว้ ดังต่อไปนี้

ข้อ ๑ ให้ชะลอการนำเข้าหรือนำผ่านราชอาณาจักรซึ่งสุกร หมูป่า หรือซากสุกร ซากหมูป่าที่มีแหล่งกำเนิดจากสาธารณรัฐอิตาลี

ข้อ ๒ ประกาศฉบับนี้ให้มีผลใช้บังคับได้เป็นเวลาเก้าสิบวันนับตั้งแต่วันถัดจากวันประกาศในราชกิจจานุเบกษาเป็นต้นไป

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