



Fruits and Vegetables

Market trends and Consumer behaviour

**CENTRAL
FOOD
RETAIL**
COMPANY LTD

*By Ms Supavadee Nimmanakait
Central Food Retail Group*

Contents

- (1) Retail Landscape in Thailand
- (2) Central Food Retail Introduction
- (3) Fruits and Vegetables market
- (4) Fruits and Vegetables situation at Central Food Retail
- (5) Opportunities and development for EU import fruits and vegetables

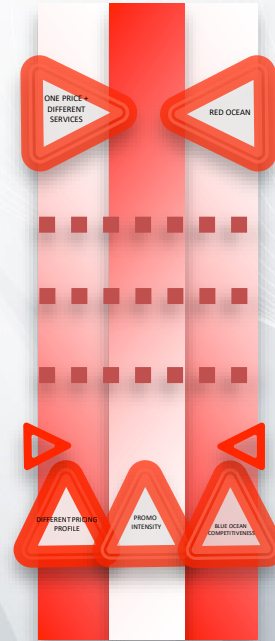
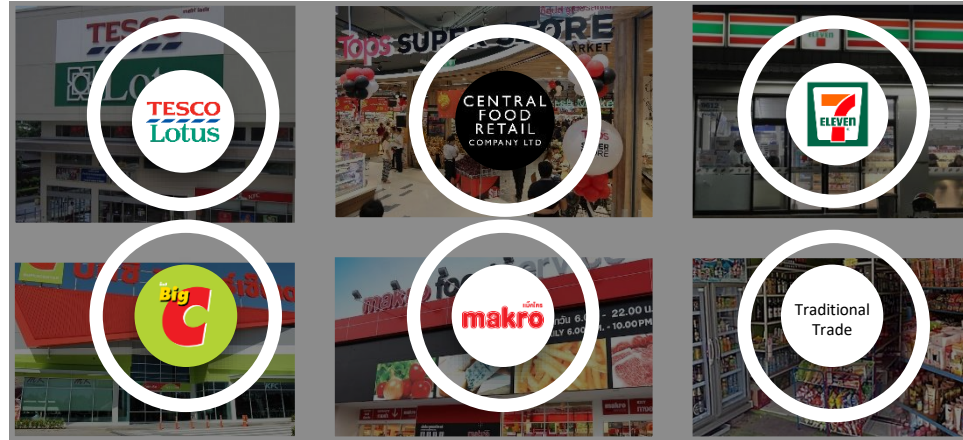


1. RETAIL LANDSCAPE IN THAILAND

2000

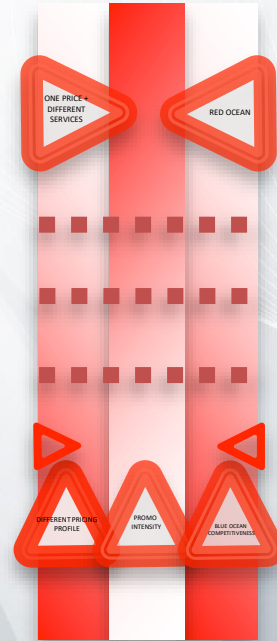
DIFFERENT PRICING PROFILE
PROMOTION LOW INTENSITY

BLUE OCEAN COMPETITIVENESS



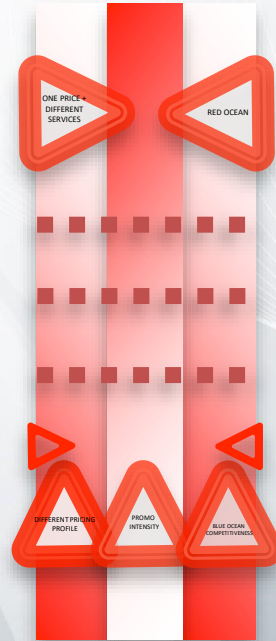
1. RETAIL LANDSCAPE IN THAILAND

2015
DIGITAL DISRUPTION



1. RETAIL LANDSCAPE IN THAILAND

2020
COVID19 ACCELERATE
ONE PRICING + DIFFERENT SERVICE
PROMOTION HIGHT INTENSITY



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1. RETAIL LANDSCAPE IN THAILAND

2021-2025
OMNI

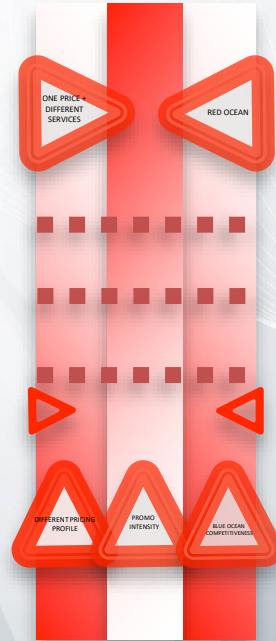


OFFLINE

+



ONLINE



2. CENTRAL RETAIL FOOD GROUP INTRODUCTION

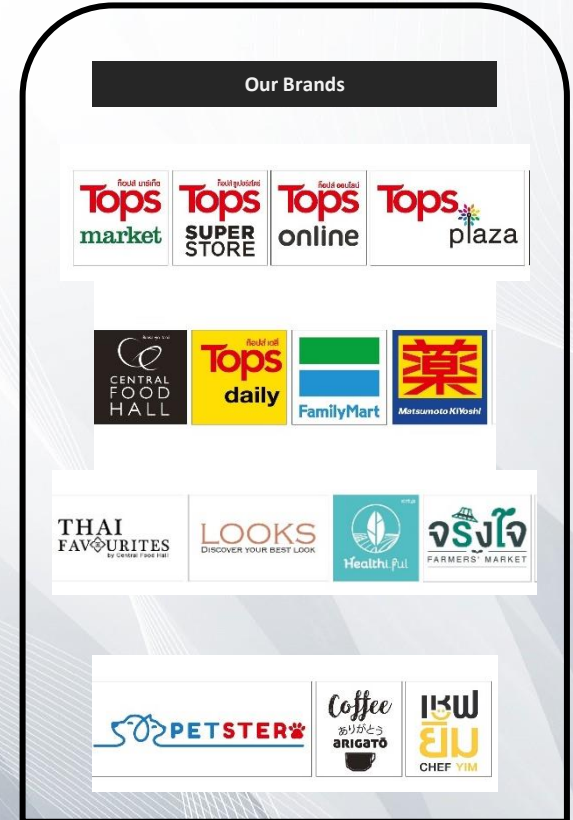
Central Food Retail Group - one of the business groups operating a food retail sector from premium supermarket, convenience store to specialty stores, established since 1996. The group currently operates a retail property brand, 6 food retail brands and 5 specialty store brands with **over 1,200 outlets** across Thailand.

No.1

**Supermarket Chain
in Thailand**

No.1

**Online
Grocery shopping**



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2. CENTRAL RETAIL FOOD GROUP INTRODUCTION



Asia's finest food store offering the most **EXTENSIVE** and **EXCLUSIVE** selections of the **FINEST FLAVOURS** sourced from the World's top producers, along with an unparalleled **SHOPPING** and **DINING** experience.



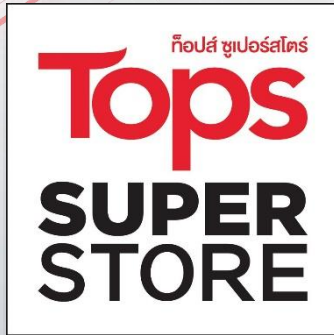
2. CENTRAL RETAIL FOOD GROUP INTRODUCTION



The supermarket filled with great assortment of **PREMIUM LOCAL** and **IMPORTED PRODUCTS** to a wide selection of deli and baked goods; it's a place to find all your daily needs.



2. CENTRAL RETAIL FOOD GROUP INTRODUCTION



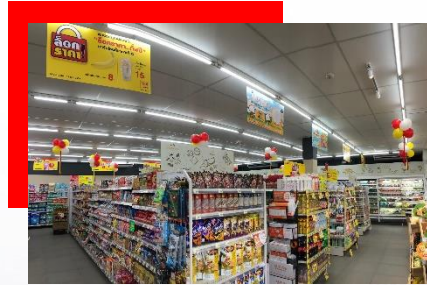
The number one retail store for customers offering an **EXTENSIVE CHOICE** combination and products of superior quality with **GREAT VALUE** in a uniquely designed shop in shop décor.



2. CENTRAL RETAIL FOOD GROUP INTRODUCTION



The mini-supermarket filled with freshness at your convenience. It offers convenience with **FAST, RELIABLE** and consistent service without sacrificing product **QUALITY** and **VARIETY**.



2. CENTRAL RETAIL FOOD GROUP INTRODUCTION



The convenience store that fulfills happiness by providing convenience in the form of **UNIQUE PRODUCT** offerings and services to meet and exceed expectation of customers in all neighborhood at any time of day with **FRIENDLY SERVICE** and **CONSISTENT QUALITY**.



3. FRUITS AND VEGETABLES MARKET IN THAILAND

Consumers of fresh fruit and vegetables cross all income levels, and these products are a common sight in both rural and urban markets



➤ Drivers and method of consumption

- A key part of the national diet and use in cuisine.
- Premium fruits and gifting.
- Health consciousness and the rise of organic fruit and vegetables.

➤ Purchase criteria

▪ Local vs imported

Local vegetables are preferred by many Thai consumers. . Nonetheless, against a lack of domestic production, imported oranges, grapes and apples may be specifically looked by consumers.

▪ Nutritional benefits

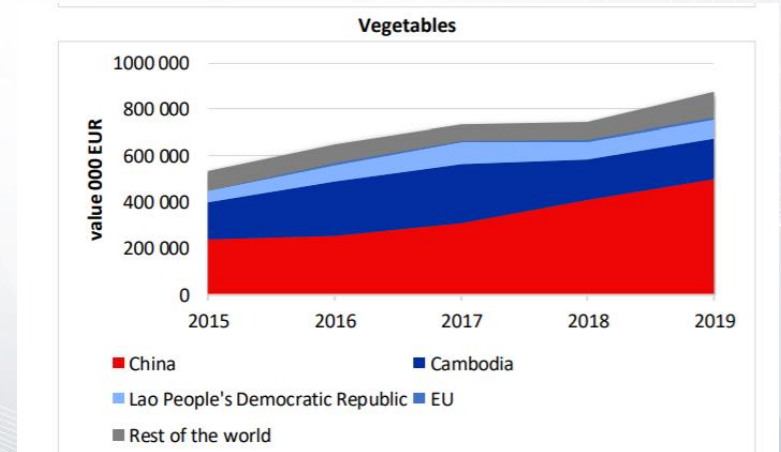
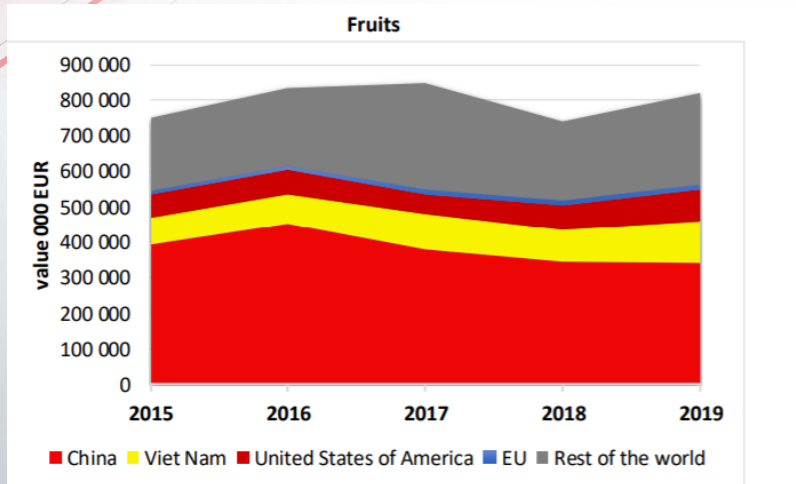
▪ Origin and branding

The origin and brand of the product have increasingly emerged to be an important factor for consideration of fruit and vegetable purchases amongst Thai consumers.



3. FRUITS AND VEGETABLES MARKET IN THAILAND

Thai imports of fruits and vegetables by country 2015 – 19 - value 000 EUR



The main competitors for EU producers seeking to enter this market are the large number of domestic producers in the country of Thailand; and furthermore, countries in the immediate vicinity such as Cambodia and Vietnam are both major producers themselves as well as notable origins of products

3. FRUITS AND VEGETABLES MARKET IN THAILAND

➤ SWOT for EU products import in Thailand

STRENGTHS (+)	WEAKNESSES (-)
<ul style="list-style-type: none">▪ The consumption fresh fruit and vegetable is firmly ingrained in Thai culture through national dishes such as Khao niao and pat thai .▪ Consumers are readily exposed to fresh fruit and vegetable products in Thailand due to the large amount of domestic production in the country.▪ The government has joined with private entities and retailers in a campaign to encourage the consumption of these products.	<ul style="list-style-type: none">▪ Domestic production is so large in Thailand that oversupply in the market has become a problem.▪ Thailand has strict access requirement and the process for EU exports to gain approval to export is often long.▪ Agricultural workers make up a large amount of total employment in Thailand, which encourages locals to buy locals to support this key element of the economy.
OPPORTUNITIES (+)	THREATS (-)
<ul style="list-style-type: none">▪ Premium fruits in Thailand such as pears and cherries(and to a lesser extent apples, apricots and prunes) are increasingly desired and are not grown to scale in Thailand.▪ Imported fruits are typically purchased as a gift product in Thailand.▪ Increased interest in organic fruit and vegetables in Thailand	<ul style="list-style-type: none">▪ Nations in Thailand's immediate vicinity such as Vietnam can quickly address any shortfalls in local production.▪ China and India are both expanding their agricultural sectors and are both located within Thailand's vicinity. China has attractive trading terms under its long standing agri FTA.▪ Premium products such as kiwis are largely imported from New Zealand which has an FTA with Thailand.

4. FRUITS AND VEGETABLES SITUATION AT CENTRAL FOOD RETAIL

➤ Direct Import Fruits and Vegetables Key milestones



➤ Actual fruits and vegetable Import catalogue

Products	Apple	Grape	Berries	Stone fruits	Pear	Citrus	Kiwi	Persimmon	Pomegranate	Dragon fruit	Avocado
Origins	*China *France *USA *Japan *New Zealand *Korea *Canada *Australia *Italy	*Chile *Peru *Australia *India *China *USA	*Korean *Chile *New Zealand *Morocco *USA *Japan *Canada	*Chile *New Zealand *Australia *Chile *Argentina *U SA *Canada	*China *Australia *USA	*USA *Korea *Japan *Australia *South Africa *China	*France *New Zealand	*Japan *New Zealand *Korea	*Japan *New Zealand *Korea	*Vietnam	*New Zealand *Peru

5. OPPORTUNITIES AND DEVELOPMENT FOR EU IMPORT FRUITS AND VEGETABLES

➤ Key information for better opportunities of EU fruits and vegetables in Thailand

- 1. Buyers more focusing on reducing risks**
 - Long shelves life products are preferred
 - Logistic efficiency is a must
- 2. Health consciousness triggers clean consumption**
 - popularity of pure and organic products continue
- 3. Convenience gain importance**
 - Ready to eat package
 - Freshly cut products
- 4. E- Commerce is gaining market share**
 - More pressure on Quality and Freshness (importance of post – harvest)
- 5. Branding enhances consumer's experience**
 - Enhance marketing campaign
 - Be ready to develop OEM
- 6. Sustainable sourcing is becoming mainstream**
 - Reducing plastic packaging



5. OPPORTUNITIES AND DEVELOPMENT FOR EU IMPORT FRUITS AND VEGETABLES

- **Fruits and vegetable trade with EU can be developed under 2 simultaneous approaches**

Off Season products

- Premium products (not grown to scale in the country) include pears, cherries and kiwis...
 - Price must be competitive
 - Volume
 - Efficient Logistic
- Opportunities for Own Brand development

Specific products

- Specific products with high add value & strong national image
- Organic certified products
- Geographical Indication (Europe GI)
- Develop specific and offer by country
- Need In addition, advertising through social media, newspapers, radio, television, celebrity endorsements, and bloggers is recommended.

THANK YOU



Q&A

