

APEC

High Level Public – Private Forum on Cold Chains

To Strengthen Agriculture and Food's Global Value Chain

28-30 October 2015
Kagoshima , Japan

Mr. Chusak Chuenprayoth

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Chairman of the Committee on Food and Agriculture business for Fruit and Vegetable.

Chairman of the Committee of ThaiGAP Institute

Thai Chamber of Commerce/Board of Trade of Thailand.

Export Statistic January - August 2015

Description		Total			Total			Growth Rate %		
		January - August 2014			January - August 2015			January - August 2015		
		Q (Tons)	V (M/B)	V (M/US.\$)	Q (Tons)	V (M/B)	V (M/US.\$)	Q (Tons)	V (M/B)	V (M/US.\$)
Shrimp	Fresh (0506)	41,138.76	15,801.76	491.37	39,808.98	12,638.12	384.13	-3.23	-20.02	-21.82
	Processed(1605.21)	44,647.26	18,796.79	584.63	44,413.84	15,858.04	482.17	-0.52	-30.92	-17.53
	Black Tiger Shrimp Fresh & Processed	3,676.36	1,295.74	40.39	2,493.89	895.04	27.24	-32.16	-30.92	-32.56
	Total	89,462.38	35,894.29	1,116.39	86,716.71	29,391.20	893.54	-3.07	-18.12	-19.96
Cephalopod	Fresh (0507)	35,965.41	6,751.48	209.77	29,461.66	5,299.57	161.42	-18.08	-21.51	-23.05
	Processed(1605.54)	4,660.54	1,029.12	31.99	4,326.52	938.06	28.54	-7.17	-8.85	-10.78
	Total	40,625.95	7,780.60	241.76	33,788.18	6,237.63	189.96	-16.83	-19.83	-21.43
Fish	Fresh (0302/ 0303)	107,798.96	3,823.73	118.88	92,197.82	2,854.44	86.92	-14.47	-25.35	-26.88
	Processed (1604)	45,257.14	5,401.08	167.91	43,808.07	5,178.81	157.52	-3.20	-4.12	-6.19
	Fresh Tuna (0302/ 0303)	11,355.53	970.15	30.10	12,773.49	1,192.85	36.30	12.49	22.96	20.60
	Processed Tuna (1604.14)	5,164.34	669.10	20.74	7,630.99	960.21	29.20	47.76	43.51	40.79
	Fresh Sliced (0304)	46,887.64	6,679.82	207.62	42,755.88	6,383.56	194.29	-8.81	-4.44	-6.42
	Sashimi (0304.99)	10,858.71	850.27	26.43	12,435.21	1,070.86	32.62	14.52	25.94	23.42
	Total	227,322.32	18,394.15	571.68	211,601.46	17,640.73	536.85	-6.92	-4.10	-6.09

Export Statistic January - August 2015

Quantity (unit %)				
Description		Proportion (%) in main markets (USA, JP, EU)	Countries (Growth, Proportion)	Countries (Decline, Proportion)
Shrimp	Fresh (0506)	74.1	U.S.A (3.37, 41.72%)	Germany (-58.00, 2.00%)
	Processed(1605.21)		S.Korea(29.70, 3.88%)	EU (-51.96, 6.11%)
	Black Tiger Shrimp Fresh & Processed		Vietnam(35.28, 3.28%)	Utd.Kingdom(-42.68, 2.94%)
Cephalopod	Fresh (0507)	70.65	Taiwan (2.55, 3.24%)	Vietnam(-59.77, 2.97%)
	Processed(1605.54)		Cambodia (1,898.98, 0.06%)	EU (-22.37, 42.06%)
			New Zealand (7.58, 0.37%)	Italy (-19.43, 35.86%)
Fish	Fresh (0302/ 0303)	15.41	Vietnam(70.51, 6.55%)	China (-50.78, 7.08%)
	Processed (1604)	37.44	U.S.A (10.72, 4.70%)	Japan (-5.17, 22.39%)
	Fresh Tuna (0302/ 0303)	71	S.Korea (13.09, 2.76%)	EU (-26.91, 4.95%)
	Processed Tuna (1604.14)	32.04		
	Fresh Sliced (0304)			
	Sashimi (0304.99)			

Import Statistic January - August 2015

Description		Total			Total			Growth Rate %		
		January - August 2014			January - August 2015			January - August 2015		
		Q (Tons)	V (M/B)	V (M/US.\$)	Q (Tons)	V (M/B)	V (M/US.\$)	Q (Tons)	V (M/B)	V (M/US.\$)
Shrimp	Fresh (0506)	9,474.53	2,624.66	80.53	9,318.47	2,420.91	73.02	-1.65	-7.76	-9.33
Cephalopod	Fresh (0507)	82,426.08	4,809.33	147.84	112,194.44	5,148.87	154.98	36.12	7.06	4.83
Fish	Fresh (0302/ 0303)	366,137.18	14,189.05	435.79	343,853.28	13,995.25	421.23	-6.09	-1.37	-3.34
	Fresh Tuna (0302/ 0303)	502,517.92	25,595.97	785.67	465,880.68	19,762.88	593.37	-7.29	-22.79	-24.48
	Fresh Sliced (0304) & Sashimi (0304.99)	52,303.74	4,286.57	131.63	69,239.48	6,053.46	182.16	32.38	41.22	38.39
	Total	920,958.84	44,071.59	1,353.09	878,973.44	39,811.59	1,196.76	-4.56	-9.67	-11.55

Import Statistic January - August 2015

Description		Growth Proportion (%) of Importing
Shrimp	Fresh (0506)	Pakistan (197.23, 9.54%)
		Canada (34.15, 11.78%)
Cephalopod	Fresh (0507)	China (136.77, 49.71%)
		Taiwan (1,995.91, 5.84%)
		Peru (9.45,24.66%)
Fish	Fresh (0302/ 0303)	Japan (29.58, 9.44%)
	Fresh Tuna (0302/ 0303)	S.Korea (72.68, 7.44%)
	Fresh Sliced (0304) & Sashimi (0304.99)	Papua New Guinea (119.21, 10.50)

Statistic of IN & OUT Reefer container

October 2014 – September 2015

MONTH	IN						Total		OUT						TOTAL		Net TOTAL	
	With GOODS			Without Goods			BOX	TEU	With GOODS			Without Goods			BOX	TEU	BOX	TEU
	20'	40'	45'	20'	40'	45'			20'	40'	45'	20'	40'	45'				
OCT 14	409	4,963	-	21	311	-	5,704	10,978.00	661	5,288	-	4	141	-	6,094	11,523.00	11,798	22,501.00
NOV 14	454	5,692	-	157	336	-	6,639	12,667.00	713	5,559	-	5	168	-	6,445	12,172.00	13,084	24,839.00
DEC 14	462	5,472	-	65	367	-	6,366	12,205.00	678	5,638	-	11	313	-	6,640	12,591.00	13,006	24,796.00
JAN 15	532	5,118	-	171	239	-	6,060	11,417.00	476	5,557	-	29	359	-	6,421	12,337.00	12,481	23,754.00
FEB 15	442	4,661	-	64	212	-	5,379	10,252.00	565	5,336	-	96	325	-	6,322	11,983.00	11,701	22,235.00
MAR 15	487	4,985	-	92	561	-	6,125	11,671.00	663	7,298	-	31	182	-	8,174	15,654.00	14,299	27,325.00
APR 15	434	4,694	-	103	1,234	-	6,465	12,393.00	515	6,864	-	15	35	-	7,429	14,328.00	13,894	26,721.00
MAY 15	449	3,487	-	9	1,292	-	5,237	10,016.00	724	10,509	-	24	41	-	11,298	21,848.00	16,535	31,864.00
JUNE 15	511	3,065	-	13	535	-	4,124	7,724.00	662	9,287	-	3	103	-	10,055	19,445.00	14,179	27,169.00
JUL 15	482	3,820	-	20	484	-	4,806	9,110.00	621	8,546	-	71	171	-	9,409	18,126.00	14,215	27,236.00
AUG 15	473	3,941	-	22	856	-	5,292	10,089.00	593	9,526	-	10	245	-	10,374	20,145.00	15,666	30,234.00
SEP 15							-	-							-	-	-	-
TOTAL	5,135	49,898	-	737	6,427	-	62,197	118,522.00	6,871	79,408	-	299	2,083	-	88,661	170,152.00	150,858	288,674.00

Majors Exporters are complied with

International Private Food safety standards :

- **GMP** (Good Manufacturing Practice)
- **HACCP** (Hazard Analysis and Critical Control Point)
- **BRC** (British Retail Consortium)
- **IFS** (International Featured Standards)
- **GFSI** (The Global Food Safety Initiative)

**CASE STUDY
FROM
Thai Frozen Foods Association**



TFFA

Thai Frozen Foods Association

สมาคมอาหารแช่เยือกแข็งไทย

HISTORY

Thai Frozen Foods Association (TFFA) is a private non-profit organization founded in 1968 under the Thai Trade Association Act. The original name was Thai Marine Products Association, then changed to Thai Fishery and Frozen Products Association in 1983 to cover the frozen products industry.

Finally, the present name of Thai Frozen Foods Association was adopted in 1994. The name clearly reflects the overall scenario of frozen products as food item, as well as expands the association's supervisory role beyond marine products to cover many other food categories.

TFFA runs by Directors elected from its members to a 2 year-term. The main business of its members is processing and exporting frozen foods. TFFA derives its income from annual membership fee, as well as service provided such as sample analysis, arranging seminars, sales of forms and documents. It now has more than 200 member companies, with an office located at business area of Bangkok.



TFFA

Thai Frozen Foods Association

สมาคมอาหารแช่เยือกแข็งไทย

Objective

The stated purposes are

- To Promote the entrepreneurship for all types of frozen fishery and agricultural products.
- To Promote the harmony and information exchange among members.
- To Serve as the intermediary in reaching compromises regarding conflicts that may occur among the members themselves or between members and outsiders.
- To Establish regulations and mutual agreements for members to follow for smooth operation of the business.
- To Encourage both in quantitative and qualitative, the business of fishery and agricultural products in response to the increase, demand of both domestic and international markets.
- To Compile statistics about fishing, production, sales and export. To survey and study the member's opinions concerning their business for use to benefit others as a whole.
- To Cooperate with the government sectors responsible for Thai fishery industry; for example, shrimp, fish, cephalopods and other agricultural products.
- This association has no objectives relating to politics.



TFFA

Thai Frozen Foods Association

สมาคมอาหารแช่เยือกแข็งไทย

Vision

TFFA

The principal organization setting direction for Thai frozen food industry, with body of knowledge at the international level to enhance and increase the sustainable competitive capabilities.



TFFA

Thai Frozen Foods Association

สมาคมอาหารแช่เยือกแข็งไทย

Mission

MISSION I:

Setting direction for the industry

Strategies:

1. Develop and submit national strategies of frozen food industry to relevant government agencies.

Get actively involved in forming policy or regulation.

2. Set up the joint working committee with government agencies to formulate a monitoring system for global trade barriers and other trends which may impact the industry.

3. Push for and participate in scientific testing through out the supply chain.

4. Ensure a sufficient labor supply through participation in national policy forming.

5. Develop up-stream to down-stream cluster in aquaculture and fishery.



TFFA

Thai Frozen Foods Association

สมาคมอาหารแช่เยือกแข็งไทย

Mission

MISSION II:

International body of knowledge development and services

Strategies:

1. Establish a frozen foods training center.
2. Institute an information center at TFFA, with trade and standard data base for the industry.
3. Build up appropriate body of knowledge on logistic management.

MISSION III:

The sustainable competitive capability enhancement

Strategies:

1. Upgrade members' capability and innovation with high quality research.
2. Promote brand building and value-added processes to members' product lines.

Fish



Pictures are from website : <http://www.thai-frozen.or.th>

Shrimp



Pictures are from website : <http://www.thai-frozen.or.th>

Crab



Pictures are from website : <http://www.thai-frozen.or.th>

Cephalopod



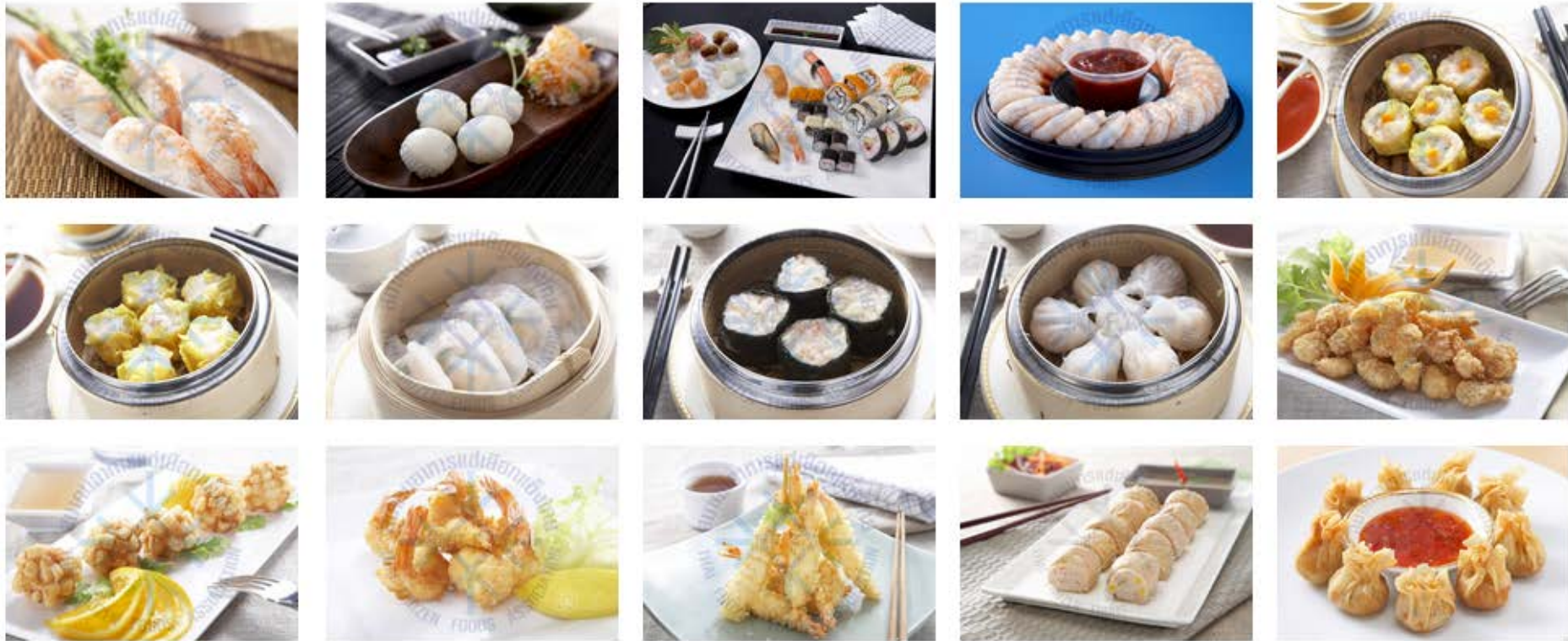
Pictures are from website : <http://www.thai-frozen.or.th>

Ready to Eat



Pictures are from website : <http://www.thai-frozen.or.th>

Ready to Eat



Pictures are from website : <http://www.thai-frozen.or.th>

End

Thank you