

**La Grande Distribuzione
in Thailandia**

A cura di Ice Bangkok

*Realizzato da Ice Bangkok nel gennaio 2011
Ringraziamo il nostro stageur dr. Edoardo Briola per il prezioso contributo
nella redazione della ricerca*

THAILAND'S MASS RETAIL

(Updated July 2010)

Content:

- A. Market Overview
- B. Highlight on Retail Development 2008 - 2010
- C. Introduction of Major Retailers in Thailand
- D. Trend of Retail Market
- E. List of Retailers by Category
- F. Address of Retailers by Category
- G. Useful Contacts

A. Market Overview

- Thailand's Mass Retail is considered as an integral part of the growth of the economy. In 2009, taxes from the retail system valued THB 2.50 trillion (approx. US\$ 75.76 billion), shrinking by 3.85 percent from THB 2.60 trillion (approx. US\$ 78.79 billion) in 2008. The retail sector accounted 12.80 percent of national Gross Domestic Product (GDP), as well as it ranked as the 3rd largest sector generating jobs for approximately 6.09 million people, or 16.11 percent of the total workforce (after employment in Agricultural and Manufacturing Sectors).
- In Thailand retail can be classified into 7 categories as following:
 1. Department stores
 2. Malls
 3. Discount Stores (Supercenter / hypermarket, cash-and-carry)
 4. Supermarkets
 5. Convenience stores
 6. Category Killers
 7. Small to medium retail stores
- The value of Thailand's retail increased on average by 10 percent annually, thanks to the large population, rising purchasing power and incoming tourists. The expansion of modern retail is relatively more accelerated than traditional one, the estimated market proportion of modern to traditional retails was 40:60 in 2001, 60:40 in 2005 and 70:<30 in 2008. Some reasons explained the decrease in the fraction of traditional retails: the closing down of some retails due to losing cost competitiveness and inattention to operational and marketing adjustments.

The Department of Internal Trade of the Ministry of Commerce conveys that the number of modern retail stores in April 19th, 2010 is 10,177, increased significantly over the last decade from 1,429 stores in 2000, (increased by on average 874 stores per year) while traditional trade has approximately 300,000, but its market value is just 170 billion baht (approx. US\$ 5.15 billion), or 6.80 percent of the total size of retail market.

- According to research conducted by the Institute of Small and Medium Enterprises Development (ISMED) and International Retail and Franchise Business R&D Center, there is an interesting outcome found: the proportion of consumers' spending of THB 1,000 in Supermarket/Hypermarket is 660, in G-stores in gas station 117, in traditional retails 89, in franchising retails 84 and in other retails 50. The spending in mass retail of

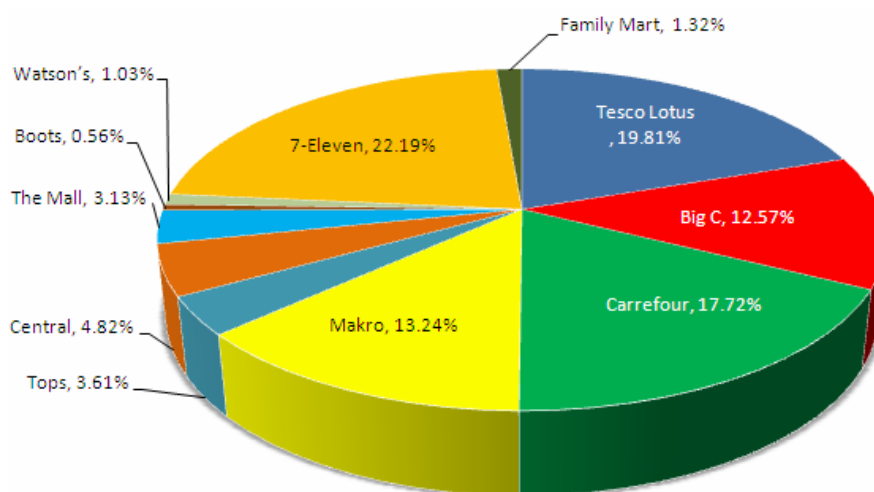


Supermarket/Hypermarket secures approximately 66 percent more money, the highest value. The research also concludes that there are more than 86 percent of consumers willing to purchase from traditional retails as the stores are located closer to their home. The frequency of going to supermarket/hypermarket of Thai consumers is on average once a week.

- The majority of Thailand's supermarket and hypermarket operators stock a range of private-label products, mainly for product categories such as ready-to-eat, ready-to-cook food, dairy, bakery products, rice, cereals, sauces and bottled water and juices. Most stores offer additional services as well as they provide recreational activities such as fast food outlets, kiosks, laundry services, florists, bookstores, photographic stores, video rental services, game zone and kid parks, and restaurants, which serve as means of boosting sales, achieving competitive differentiation and encouraging customer royalty. A particular characteristic of Thai market is that a small size of supermarket outlets which are mostly stand-alone stores is always appended to department stores.

Major retail operators									
No.	Company	Origin	Format	Sales (THB Million)				No. of stores	
				2008	2003	2004	2009		
1	Tesco Lotus	UK	Hypermarket	108,077	47	49	80		
2	Big C	France	Hypermarket	68,588	36	39	68		
3	Carrefour	France	Hypermarket	96,641	19	20	30		
4	Makro	Netherland	Hypermarket	72,225	22	28	45		
5	Tops	Thailand	Supermarket	19,686	48	48	114		
6	Central	Thailand	Department store	26,276	14	14	15		
7	The Mall	Thailand	Department store	17,090	NA.	NA.	10		
8	Boots	UK	Category Killer	3,044	56	63	131		
9	Watson's	Hong Kong	Category Killer	5,602	73	73	146		
10	7-Eleven	Thailand	Convenience store	121,026	2,300	2,379	5,270		
11	Family Mart	Japan	Convenience store	7,226	250	500	573		
***Total from 11 players MODERN RETAIL				545,481	<i>No. of stores 2005-2008 unavailable.</i>				

Estimate - Market Share Breakdown 2008



Source: ICE Bangkok, generated by using information from:
 - Department of Business Development, Ministry of Commerce of Thailand
 - Department of Internal Trade, Ministry of Commerce of Thailand
 - Companies' Investor Information Releases

C. Introduction of Major Retailers in Thailand

- **7 – ELEVEN** (Convenience store)

7-ELEVEN store, operated by CP All Public Company Limited, is considered as the largest chain of 24 hours-open convenient stores in Thailand and currently there are 5,270 branches across the country, while another 28,296 branches are overseas. 7-ELEVEN is strategic to not only provide consumer and household products, but also there are offerings of various services such as settlement of utilities; telephone, electricity and water, airline and bus ticket, insurance fees etc. The business expansion of 7-ELEVEN is processed through franchising licenses and the fee per license is THB 350,000 – 500,000 (1 US\$ = 33 baht) upon package chosen. CP All supports franchisees through responsibility to organize mass advertising, marketing campaigns, providing of complimentary management training programs and after service consultation in order to strengthen the sale turnover of the stores. The number of 7-ELEVEN stores in Thailand is expected to increase dramatically since there are still many areas in need for development. According to Investor Information Release on 18th February 2010, 7-Eleven has average daily sales per store per day THB 72,393 with average 1,253 tickets (bills).



In 2010, Vice President Mr. Suwit Kingkaew explains that CP All plans to add 350 branches to its network this year in addition to the 100 stores that were opened in the first quarter. Furthermore the company plans to spend more than 500 million baht to open its new distribution center in Khon Kaen province to enhance the efficiency of supply chain in the Northeast.

In 2011, CP All will open its first “Green 7-Eleven” at Panyapiwat Institute of Technology on Chaeng Wattana Road. This is the new store in energy saving concept and the expectation is to cut energy usage by at least 30 percent when compared to the existing stores. Sanyo (Thailand), Japanese manufacturer of electrical products, is collaborating with the engineer team from 7-Eleven involving adapting electrical products in retailer’s green outlets. Once the first model works satisfactorily, CP All will convert its entire convenience stores into the green outlets.

However, the cost of investment for green store is relatively higher compared to normal outlets (double price). The minimum investment for a 100-square-metre green store is 3 million baht (approx. US\$ 93,750, exchange US\$ 1 = 32 baht), but it is calculated to achieve a return on investment after 5 years.

- **FAMILY MART** (Convenience store)

Family Mart, 24-hour open convenient store originally from Japan, was founded in Thailand in 1992 and its first store was introduced in 1993 at Phra Khanong in Bangkok. By the end of March 2010, the number of existing stores in Thailand was 573. In addition to expansion, Family Mart will closely coordinate operations with those of Siam DCM Company Limited, a distribution and wholesaling company. By making greater use of the demand-chain management (DCM) expertise developed by Family Mart in Japan, Siam Family Mart is seeking to comprehensively optimize production, distribution and sales processes while concurrently boosting sales and gross profit ratio. Based on the slogan “Customers First”, Siam Family Mart Company Limited is undertaking a thorough organizational improvement program aimed at strengthening the capabilities of each of its departments and further augmenting interdepartmental collaboration, thereby greatly boosting the dynamic power of its organization.



Family Mart expands the stores through franchising and own-operated stores. As of March 31st 2010, Family Mart has 573 outlets across the country, of which 128 branches are franchised. The license fee for franchise is THB 250,000, but the franchisees must have minimum capital THB 1.2 million. The license will mature within 9 years. The principle profit margin to franchisees is approximate 40 percent after deduction of the principal costs.

In 2009, sales of Family Mart were THB 8.5 billion. It was forecasted to increase by 10-12% to between THB 9.35 billion and THB 9.5 billion in 2010. The revenue was mainly generated by sales of bakery and food items. Bakery and food items accounted 27 percent and the company, expected to increase in its proportion to 60-70 percent over the next few years.

In 2010, Chief Operating Officer Mr. Thawatchia Moonwong expresses that during year the intention is to faster-pace expansion through supplying more food items in the stores via strategic alliances with Thai Yamazaki Bakery. Family Mart joins with the bakery company by opening Yamazaki Bakery Express corner targeting office workers. The first model of the alliance has been introduced in the Vanich Building on Petchaburi Road. The corner with total retail space of 48 square meters and small kitchen will offer customers with 250 Yamazaki product items from 6 am. to 10 pm. The company expects to serve 500 customers daily and obtains sales of 30,000 baht per day.

Family Mart plans to open another 72 outlets in 2010 and all of them are company-owned, compared to 56 outlets opened last year. Also new offerings in the near future will include Bento and frozen food items.

Family Mart Group currently operates 15,887 stores worldwide and projects the expansion to 20,000 stores within 2010.

- **MAKRO** (Cash & Carry)

The main business of Siam Makro Public Company Limited is the operation of Wholesale Cash and Carry Trade Centers, registered under the brand of "Makro" throughout Thailand. Currently, there are 45 Makro stores of varying sizes, 8 stores are located within the Greater Bangkok area and 37 stores are in the provinces. The focus customers of Makro are small to medium businesses such as predominately small retailers, HoReCa (Hotels, Restaurants, and Caterers), and service sectors. The Company has two 99 percent-owned subsidiary businesses; *Siam Food Services Limited* ("SFS") is a leading provider of premium food products, value-added services and logistic services to the hospitality and food service industry nation-wide. It specializes in supplying highly specific frozen and chilled meat, seafood, poultry, seasonings, etc. SFS currently operates from 2 locations, one in Bangkok and the other in upcountry. *Makro Properties Limited* ("MPL") is a land investment company and a number of Makro stores are located on land owned by MPL.



Siam Makro Public Company Limited is part of the SHV group, a privately held Dutch group, which operates a diversified portfolio of businesses across the globe. Makro is currently trading in 6 countries with over 165 stores worldwide. For Thailand, an experienced professional management team based at the head office in Bangkok manages the company and also supports the management in each store over the country. The number of the employees presently is estimated to 4,920 persons.

Currently, Makro has three main customer groups. About 55% of its revenue is from grocery items, 16% from HoReCa (hotels, restaurants and catering customers) and the remaining from miscellaneous sources. It has about 600,000 registered members.

Siam Makro Public Company Limited shares are listed on the Stock Exchange of Thailand with a total registered share capital of 240 million shares and has par value of Baht 10 each fully paid-up as at 31st December 2008 of THB 2,400 million. The total shareholders' equity as at the end of 2008 was THB 8,528 million, increased by THB 234 million from 2007. Total revenues for 2008 was THB 74,310 million and the net earnings after taxes were THB 1,674 million, an increase of 16.2% and 29.6% from those of last year respectively.

- **TESCO LOTUS** (Hypermarket)

Tesco Lotus is a hypermarket chain in Thailand and China. In Thailand, the stores are operated by Ek-Chai Distribution System Company Limited. Established in 1998, Tesco Lotus was a joint venture of the Charoen Pokphand Group and Tesco, the British giant supermarket chain. However, facing criticism over the growth of hypermarkets in Thailand, the CP Group sold its shares in Tesco Lotus in 2003, though it did retain interest in Tesco Lotus in China (which operates under the Lotus name with Tesco being a separate chain).

Today, Tesco Lotus becomes the largest hypermarket serving approximately 29 million customers per month, until Big C will take over Carrefour's operations in 2011. To handle those shoppers, a large parking lot for thousands of cars and hundreds of motorcycles are in facilities. In some branches it also provides space for an aerobic activity in the evening everyday in order to offer social benefits. Presently the company has more than 36,000 staffs, both direct and outsourced employees. Most important business in Tesco Lotus is the distribution, there are 3 distribution centers located in Wangnoi, Bangbuathong and Samkok.



The standard floor plan of Tesco Lotus stores can be divided into 3 areas as following:

1. Store area for shopping products (more than 36,000 items).
2. Food court area for various menus and budget-save.
3. Mall area for various shops to fulfill your shopping needs including banks, ATM, dessert shops, food shops, restaurants, book shops, CD and entertainment shops, gold and jewelry shops, optic shops, drugs stores, schools for kids, play park, these shops are varied along with size and space in each branch.

Tesco Lotus offers over 36,000 items as well as certain services are provided as well.

- Grocery Food: Cooking needs, Agricultural product, Pasta & instant food, Canned food, Baking needs, Confectionery & snack, Food supplement, Beverage, Dry products, Seasoning, Club pack.
- Grocery Non-Food: Health & beauty, Oral hygiene, Hair care, Cosmetics, Household chemical, Paper goods, Pet food & supplies, Gift, Religion, Party goods.
- Fresh Food: Bakery, Produce, Meat, Fish, Dairy, Frozen, Ready to cook, Ready to eat, Delicatessen.
- Apparels: Basic, Men wear, Ladies wear, Boy wear, Girl wear, Baby wear, Baby accessories, Luggage, Shoes, Rainy accessories, School uniform (Available on back to school period).
- Hard line – Home: Office supplies, Toys, Sporting goods, Automotive, Horticulture, Bath, Hardware, Lighting, Home decorative, House ware, Bedding, Home furniture, Office furniture, Cooking tools, Plastic ware, cleaning accessories.
- Hard Line - Electronic: TV & Audio, Computer & accessories, Mobile phone & accessories, Appliance, Camera & films, Office automation, Battery, Entertainment
- Liquor & Tobacco

- Services: Beside various products, Tesco Lotus has other services such as shopping carts and baskets, deposit bag, free drinking water, price check points, fitting rooms for men and women, cooking services for fish and seafood, installment purchase, home delivery (for electrical appliance and large size furniture). Customers may ask for details about any services at the customer service counter.

- **TOPS SUPERMARKET**

Tops is the largest supermarket chain in Thailand operating since 1996. Formerly part of the US-based Tops Markets LLC (Tops bought all former Food Lion locations in 2004, after the American grocery chain pulled out of Thailand), the chain is operated under the name "Tops Supermarket" in Thailand by Central Food Retail (CFR), a subsidiary of Central Retail Corporation (CRC) of Central Group. The company currently operates 114 branches nationwide with 79 stores in Bangkok and 35 stores located upcountry. Most stores are normally situated in Central and Robinson Department stores, while others are freestanding supermarkets.



In 2006, the company is successfully repositioning its family chain and represents the variety of customers shopping lifestyle through four different retail formats; (1) Central Food Hall, (2) Tops Market, (3) Tops Super, and (4) Tops Daily.

Central Food Retail is responsible in procurement of products to sell in Tops stores and the practice of sourcing is purchasing from local companies for local and imported products and import directly from overseas sources for certain products. The sourcing teams are classified by product categories such as Fresh products, frozen products, canned products etc.

OEM and sell by own brand "Tops". Central Food Retail will cooperate with leading manufacturers in Thailand for OEM production of certain products and then sell by own brand "Tops". The company is strategically owned in order to provide alternatives for customers, offering 100 percent guaranteed quality products.

In addition to financial status of CFR, the company earned THB 19.69 billion of revenue in 2008, increased by 1.8 percent, against net profit of THB 137 million. The total asset of the company valued THB 5.81 billion.

- **CARREFOUR (Hypermarket)**

Carrefour Thailand was firstly opened in 1996 on Sukhapiban 3 Road, Bangkok, with a capital investment of THB 10 billion. Carrefour is operated by CenCar Company Limited and today has 42 stores nationwide; Carrefour has more than 7,000 employees in Thailand. Very recently Carrefour has announced its disinvestment of Thai operations, which will be sold to Big C. Therefore the retail brand will gradually disappear from Thailand.



Carrefour hypermarkets offer an average surface area of 8,400 square meters filled with a range of between 20,000 and 80,000 food and non-food items, all at extremely attractive prices. Located in the center of broad catchment areas, they will often be important drivers of traffic in the area around them. Carrefour's emphasis on price, one of the key elements of the brand's strategy, is complemented by its constant pursuit of improvement in ranges and services. This includes adapting what is on offer to local needs, extending product ranges and developing services for customers with whom Carrefour seeks to form ever-closer ties, with the aim of improving the service it offers them.

Carrefour is working with more than 2,000 local suppliers and maintaining those relationships is drawn to be part of sustainable mutually beneficial programs. Using local suppliers also helps to integrate Carrefour into the local economic and social fabric.

Besides purchasing products from local suppliers, Carrefour also plays the role of exporters for Thai products to international markets. During the past 5 years, more than 30 suppliers of food products and 24 manufacturers of nonfood products such as handicraft, shoes, flower that are able to widen their market to international scale with Carrefour. For food industry, Carrefour Quality Line Mangoes has been exported weekly basis to Singapore market.

B. Highlight on Retail Development 2008 - 2010

- *The Nation Newspaper dated 20th June 2008*, **Carrefour** extended retail business through opening its THB 140 million invested-first community mall in the Suanluang area of Bangkok. The community mall contained a 2,000-squaremeter Carrefour mini-market with another 18 commercial units rental by retails vendors. The complex opens daily from 9 am. – 11 pm. This expansion strategy derived from the internal survey that consumers have adjusted their shopping behavior to cope with higher living costs, particularly the increase in petrol prices. They prefer to shop near home.
- *Bangkok Post Newspaper dated 30th March 2009*, Thailand-based convenience stores **Sun 108**, subsidiary of consumer goods company Saha Group, had decided to open 200 new convenience store outlets in 2009. MD Vathit Chokwatana further viewed that half of the new stores would be managed by the company and the rest will be franchises, which cost THB 600,000 each. The decision of the expansion was hoped to capture more market interests that remained profitable.
- In April 2009, Thai retail operators reported a fairly initial response to **the government's THB 2,000 (approx. US\$ 60) cheque handout scheme**. Part of THB 34 billion (approx. US\$ 1.03 billion) short-term economic stimulus package, the handout was intended to encourage consumer confidence and stimulate retail purchases. The government had distributed 9 million cheques to Thai workers whom earning per month less than THB 15,000 (approx. US\$ 455).

There were positive feedbacks from many retail operators according to the government's cheque package. For instance:

- **Central Group** gave another THB 200 free per cheque with a discount of 50 percent when buying products in Central department stores and supermarkets. Another promotion was to buy THB 4,200-products with THB 2,000-cheque,
- **Big C** gave additional THB 100 baht free voucher when using the cheque to buy products as well as the buyers having the right for lucky draw of discount THB 10,000 voucher,
- **Tesco Lotus** attracted consumers to use THB 2,000-cheque to purchase products by offering a lucky draw worth THB 1 million for 10 prizes, THB 100,000 for 10 prizes and other prizes and discount promotions,
- **McDonalds** offered 20 percent discount for using the cheque to purchase products in the stores and the cheque was also eligible to be converted to cash.
- **The Mall Group** offered exchanging the cheque with THB 4,300 voucher to purchase products in its retail outlets,
- **CP**, THB 2,000-cheque was eligible to buy products valued THB 2,400 in CP Fresh Mart.
- *The Nation Newspaper dated 16th July 2009*, **Tesco Lotus** has announced plans to invest THB 5 billion (approx. US\$ 152 million) in the second half of the year on its new "Roll Back" everyday-low-price campaign and "Super Save" price-cut promotion. The "Roll Back" campaign will provide discount of up to 7.6 percent on more than 800 essential products, while the "Super Save" promotion will offer even deeper price cuts on more than 1,000 items

on a one-time-only basis. Director and Chief Marketing Officer Mr. Gwyn Sundhagul has enlighten that those twin campaigns are part of company efforts to reduce waste with the organization by reviewed working processes to narrow costs and expenditures and all gains from cost-saving measures will be put back into the low-price and discount promotions.

The amount of those billions is an addition to more than THB 2.5 billion already spent in the first half of the year to maintain prices low.

In July 2008, Tesco launched its first personal loan service in Thailand as part of its offering under Tesco Card Services unit, a joint venture with GE Money Thailand. Tesco believes that there is a significant potential for the personal loan market in Thailand given that demand is increasing by 7 percent annually. Additionally, at the beginning of September 2007, Tesco Lotus agreed a long-term partnership with Major Cineplex Group to expand the number of multiplex cinemas located in the retailer's hypermarket complexes in the country.

- *Bangkok Post Newspaper dated 29th August 2009*, MD Suchada Ithijarakul said that the sales of **Siam Makro** in the first seven months of this year grew by 2%, more slowly than in the same period last year, due to the economic downturn, lower consumer purchasing power, sharply drop in tourists caused by political instability and the H1N1 influenza. In addition, hypermarket players like Tesco Lotus had launched a 0.5% cash rebate promotion and discount campaigns on several product items to draw customers, especially grocery shoppers who were 60% of Makro's total revenues. Makro would lose a number of customers to them.

Besides, Siam Makro would spend THB 15 million to stage the "Talad Nad Chow Huay" fair from 11-13 September 2009 at Impact Muang Thong Thani. The exhibition aimed to help its grocery customers in terms of store management to help their businesses having sustainable growth. Key activity would highlight Makro Retailer's Alliance (MRA) booth - presenting seven retail shop models with providing business consultancy and guidelines to additional revenues for grocery shops. The exhibition also was selling products from Makro with over 60 consumer product booths.

Bangkok Post Newspaper dated 14th October 2009, **Carrefour** launched a new retail format to bolster its position in Thai market. Thailand's first 300-squaremeter Carrefour City convenience store is situated at Urban Square community mall near Dhurakij Pundit University as well as opening of its first mini-supermarket in Bangkok's Pracha Chuen area on 10th October 2009. The expansion is part of company's strategy to cope the changing in consumer behavior in term of using community stores closer to homes as well. Carrefour also believes that smaller-size retail store in Thailand has considered potentiality to expand in the next few years.

- **Retail and Wholesales Business Act** shall be implemented in 2010. Backward to early November 2007, Thailand's much debated retail business law appeared closer to reality after the government decided that the needs of small local retail enterprises were more important than multinational retails investment. The proposal suggested that supermarkets, discount stores and cash-and-carry outlets be regulated be one central committee that retailers required to submit plans for store opening of over 1,000sq.m. within 60 days of conception, despite the regulation infuriated multinationals which pointed to the positive impact their expansionary efforts have had on job creation and reduction of grocery prices in the country. The first draft was proposed to the Cabinet in 2005, but failed to meet the approval of the Thaksin Shinawatra's government. After several rewrites, it was approved by Surayud Chulanont's government, but it failed to enter into force before the government's term expired.
- *The Nation Newspaper dated 4th March 2010*, **Big C** set plan to invest THB 2 billion for outlet expansion this year. (Double from 2009 with THB 1.1 billion invested) The investment will be the launch of new small Big C store format to speed up the expansion. The company also

expects the purchasing power of low-income people to improve this year with a better export and tourism outlook and higher prices for agricultural products.

VP Jariya Chirathivat said that Big C will open 4-5 standard stores and the rest will be a new format with 2,000 square meters. Currently, Big C operates 68 retail stores with 3 formats - standard (from 8,000sq.m. and up), compact store (6,000sq.m.) and mini-compact (4,000sq.m). It also operates 11 Mini Big C outlets and 19 Pure drug stores.

The Nation Newspaper dated 19th April 2010, the current proposed draft of the **Retail and Wholesales Act** has been already approved by the Cabinet, but now it is on the review by the Office of Council of State. The Council has so far review only 10 articles from a total 60 articles and several more months may be required for the office to rectify the draft. The Retail and Wholesales Act may be implemented by a new government if the Abhisit Vejjajiva government will have to dissolve the House.

Bangkok Post Newspaper dated 8th July 2010, **Carrefour** reported consideration to offload its underperforming operations in Thailand, Malaysia and Singapore. It has approached potential buyers and may seek bids by early September 2010. Carrefour has withdrawn its operation in Japan and South Korea in recent years to focus on only fast-growing markets like India, China and Indonesia. Many retail operators have been approached by Carrefour and also have shown interest in participation for the bidding such as Tesco-Lotus, Big C, Berli Jucker Plc (BJC) and the Thailand' biggest consumer products conglomerate Saha Pathanapibul Plc.

Bangkok Post Newspaper dated November 16th, 2010, **Carrefour** announced the signing of an agreement with **Big C** for the disinvestment of its Thai operations for €868 million. That price represents 120% of the net sales of the business that is being sold and 13 times the earnings before interest, tax, depreciation and amortization. The purchase of Carrefour's local supermarket operations by French retailer Casino Group will break the lengthy market dominance by UK retail giant Tesco Group. After the acquisition, Casino, whose Thai subsidiary is Big C Supercenter Plc, will own 111 supermarkets against Tesco's 87. However, if other retail formats are included, Tesco has 704 stores nationwide.

D. Trend of Retail Market

- **Change from big-sized retail store to small or mini store.** Thailand is going to implement a new Retail and Wholesales Business Act that will regulate the size of retail stores, particularly the big retail formats would confront more regulations in expansion. The small or mini store formats are currently in consideration by major retail operators because of cheaper operational cost and better hitting communities. The number of retail stores in Thailand is going to increase significantly in a near future because it is still having many areas in the country not covered with stores and retail operators understand this situation clearly. The temperature of competition will be further rising aggressively in order to capture strategic locations as well as to secure market share as much as possible.
- **People relatively trend to shop more in modern retail formats.** This is because of a change in consumer behaviors, dominated by variables as following;
 - Economy development raises consumer's purchasing power and the number of income persons. It is noticeable that the people will go shopping in modern stores when having more income. Most consumers in modern stores rank starting from medium income. The atmosphere of economy is considered as a crucial variable influencing personal income and consumer's confidence. As the future economy is assumed to be better than present, it is forecasted that there will be more shoppers in modern stores as well.



- Consumers with higher health consciousness will go to modern stores, because those stores are qualified by international standards; GMP, HACCP, or ISO. Those consumers feel more confident when buying food products from modern stores, especially food that is expected to be safe and with pleasant physical aspects; cleaning of place and shelves, suitable temperature for food storage, food logistic, food preparatory processes.
- Discount promotion, market campaigns and flexible options for payment offered in modern retails attracts more consumers than traditional retails. Nowadays it seems that many modern retail operators will introduce marketing promotions such as discount price, point collection from value of purchase, gifts and complimentary vouchers, accepting payment by credit card, buy one get one free, etc.
- Variety of products, choice for selection and better categorizing in modern retails make more comfortable for consumers and gain better satisfaction.
- Consumers perceive modern retails more than shopping place, especially the mass retails which normally provide recreational facilities such as theaters, bowling, game, restaurants, coffee shops, medical treatments, beauty and salon, sport park, etc.
- Social Contribution activities generate optimistic perception to consumers. Social Contribution becomes part of sustainable market strategy used by various modern retailers in different ways, for instance;
 - o Tesco Lotus sourcing and buying products from local communities, particularly products from “OTOP” project by government in order to create additional incomes to locals, to sell in its stores. “Shopping at Tesco Lotus will also help local communities”.
 - o Big C has built 5 buildings for 5 schools in 2009.
 - o Robinson department store (subsidiary of Central Group) collaborating with Arrow Thailand to help elephants by funding THB 2 million to launch the conservation project. Arrow Thailand introduced new shirt collection and profit from sales would be donated to the project.
 - o Carrefour’s donation of 3,000 blankets worth at THB 360,000 to cold-weather victims in Chiang Rai Province in 2007.
 - o Carrefour, with the coordination of Her Royal Highness Princess Maha Chakri Sirindhorn’s Office, has provided financial support of a total of THB 15 million to “The Educational Development Project for the Hilltribes Children and Youth” in Omkoi Districts, Chiangmai Province.

Those activities will let consumers be a part of social contributions through spending in those retails.

In comparison to traditional stores, the consumers will buy products for traditional retails on occasion basis or when having urgent need and the store is closer to home. Also the quantity of items purchased and money spending per buying is less than paying in modern stores.

- **Online shopping is more activated and reputed.** Online shopping could be another beneficiary of the increased focus on convenience and regulations limiting construction of new stores. Thailand has an internet penetration rate of 25 -30 percent and a mobile phone penetration rate of approximately 90 percent. Recently UK based - Tesco Lotus, whose tesco.com site is the world largest grocery, indicated it was exploring launching an online service in Thailand. Thailand’s online marketplace is estimated to have grown 30 – 50 percent in 2009, driven mainly by increased use of smart phones, greater confidence in E-commerce security, and a shift in Internet user demographics toward older consumers with more purchasing power.
- **Green marketing trend is growing in Thailand.** Many leading retailers start introducing “a low-carbon lifestyle” shopping as environmental conservation and awareness campaign, particularly recently having persuasion consumer to reduce using of plastic bag in shopping.

Feedback from consumers appeared very significant by decrease in great number of plastic bag using, The Mall reduced by 4.6 million bags, Carrefour 2.9 million, Lotus 1.2 million, Big C 1.7 million, Central 1 million, Seven-Eleven 1.2 million. Besides, retailers start sourcing more green items to sell in their outlets/branches in order to extend choice of consumer's selection.

- **Research claimed Thailand' retail sector is near Market Saturation.** The market would seem to be nearing saturation in terms of the number of large and small formats it can be possible. The research by McKinsey explains that, for instance, the number of convenience stores per millions of people in Bangkok in the third-highest among Asian cities, but real GDP per capita in Bangkok is substantially less than those of Asia's "convenience capitals" Tokyo of Japan and Taipei of Taiwan. Nevertheless, retail operators somewhat realize that Thailand's retail market is sophisticated and it is still having huge potential for penetration.

E. List of Retailers by Category

Department Stores

No.	Name	No. of Branch (2009)		Management by	Established year	Registered Capital (Million baht)
		Bangkok	Outside			
1	Central	10	5	Central Retail Corporation	1974	3,335
2	Robinson	9	13	Robinson Department Store Plc.	1993	3,943
3	The Mall	9	1	The Mall Group	1980	100
4	Tokyu	1	1	TMD Development Co., Ltd.	1991	3,300
5	Isetan	1	-	Isetan (Thailand) Co., Ltd.	1989	290
6	Pata	1	-	Pinklao Department Store Co., Ltd.	1979	140
7	Zen	1	-	Central Retail Corporation (Zen is a separate brand name for the Department Store, operated by Central)	1989	NA
8	Tang Hua Seng	2	-	Tang Hua Seng Department Store Co., Ltd.	1976	200
	TOTAL	34	20			

Supermarket

No.	Name	No. of Branch (2009)		Management by	Established year	Registered Capital (Million baht)
		Bangkok	Outside			
1	TOPS	79	35	Central Food Retail Co., Ltd.	1992	1,529
2	Foodland	10	1	Foodland Supermarket Co., Ltd.	1972	1,000
3	Villa Market	12	2	Villa Market JP Co., Ltd.	1988	22
4	Jusco	11	1	AEON (Thailand) Co., Ltd.	1984	400
5	UFM Fuji	3	-	UFM Fuji Super (Thailand) Co., Ltd.	1985	100
	TOTAL	115	39			

Hypermarket/Supercenter

No.	Name	No. of Branch (2009)		Management by	Established year	Registered Capital (Million baht)
		Bangkok	Outside			
1	Tesco Lotus	20	60	Ek-Chai Distribution System Co., Ltd.	1993	5,137
2	Makro	9	36	Siam Makro Plc., Co., Ltd.	1994	2,400
3	Carrefour	23	7	CenCar Co., Ltd.	1996	10,000
4	Big C Supercenter	15	53	Big C Supercenter Plc., Co., Ltd.	1993	8,250
	TOTAL	67	156			

Convenient Store

No.	Name	No. of Branch (2009)	Management by	Established year	Registered Capital (Million baht)
1	7-ELEVEN	5,270	CP ALL Plc.	1989	4,500
2	Family Mart	573	Siam Family Mart Co., Ltd.	1992	175
3	AM/PM	51	AM/PM (Thailand) Co., Ltd.	1990	150
4	V Shop	792	Minimart Express Plc.	2004	5
5	Tesco Express	449	Ek-Chai Distribution System Co., Ltd.	1993	5,137
6	Mini Big C	10	Big C Supercenter Plc., Co., Ltd.	1993	8,250
7	CP Fresh Mart	600	CPF Trading Co., Ltd.	2000	800
8	108 Shop	900	Saha Pathanapibul Plc.	1952	600
	TOTAL	8,645			

G-Stores

No.	Name	No. of Branch (2009)	Management by	Established year	Registered Capital (Million baht)	No. Gas Station (2009)
1	7-ELEVEN	700	CP ALL Plc.	1989	4,500	-
2	Select	145	Shell Thailand Co.,Ltd. (subsidiary of Shell Group)	NA	NA	576
3	Tiger Mart	270	Esso (Thailand) Plc.	1996	17,110	541
4	Star mart	202	Chevron (Thai) Co.,Ltd.	1936	NA	429
5	Lemon Green & Bai Cahr	124	Bangchak Greenate Co.,Ltd (Subsidiary of Bangchak Petroleum Plc.)	1993	1	1,058
6	Everyday	118	Petronas Retail (Thailand) Co.,Ltd.	1989	50	110
7	Jiffy	147	PTT Retail Management Co.,Ltd. (Subsidiary of PTT Plc.)	1994	1,668	1,149
	TOTAL	1,706				3,863

***Remarks:

- 7-Eleven has fixed contract to set up stores in PTT gas station only. CP ALL is planning to increase its stores another 600 in 2010 in PTT gas station.
- Those petroleum operators are always the biggest stakeholder of G-stores in its gas station.

Category Killer

No.	Name	No. of Branch (2009)	Management by	Established year	Registered Capital (Million baht)
1	Office Depot	35	Office Club (Thai) Co., Ltd. (Central Retail Corporation)	1996	691
2	Home Pro	35	Home Products Center Plc.	1995	150
3	Home Works	9	CRC Power Retail Co., Ltd. (Central's subsidiary)	2004	1,500
4	Power Buy	15	Power Buy Co. Ltd. (Central's subsidiary)	1996	560
5	Super Sport	37	CRC Sport Co., Ltd. (Central's subsidiary)	1996	370
6	B2S (Book store)	91	B2S Co., Ltd (Central's subsidiary)	1995	640
7	SE-ED (Book store)	347	SE-EDUCATION Plc.	1993	328
8	Home Fresh Mart	10	The Mall Group Co.,Ltd.	1980	100
9	Power Mall	10	The Mall Group Co.,Ltd.	1980	100
10	Read & Write	10	The Mall Group Co.,Ltd.	1980	100
11	Sport Mall	10	The Mall Group Co.,Ltd.	1980	100
12	Be Trend	10	The Mall Group Co.,Ltd.	1980	100
13	Index Living Mall	17	Index Living Mall Co.,Ltd.	1994	2,000
	TOTAL	636			

***Remarks: Office Depot which managed by Office Club of Central Group previously has 19 branches, but the number increases to 35 after the company taking over Makro Office Center company of Siam Makro by another 16 branches.

Shopping Plaza in Bangkok

No.	Name	No. of Branch (2009)	Management by	Established year	Registered Capital (Million baht)
1	Emporium	1	The Emporium Shopping Complex Co.,Ltd.	1980	100
2	Gayson	1	Gaysom Property Co.,Ltd.	1996	100
3	Amarin Plaza	1	Amarin Ratchaprasong Co.,Ltd.	1981	375
4	Erawan Bangkok	1	The Erawan Group Plc.	1994	2,244
5	Central World Plaza	1	Central World Co.,Ltd.	2002	2,512
6	Siam Center	1	Siam Piwat Co.,Ltd.	1959	174
7	Siam Discovery Center	1	Siam Piwat Co.,Ltd.	1959	174
8	Siam Paragon	1	Siam Paragon Development Co.,Ltd.	2001	100
9	MBK Center	1	MBK Plc.	1994	1,886
10	Penninsular Plaza	1	NA	NA	NA
11	Secon Square	1	Seacon Development Plc.	2002	574
12	Future Park	1	Rangsit Plaza Co.,Ltd.	1991	400
13	Esplanade	2	Siam Future Development Plc.	2002	1,047
14	Market Place	1	Siam Future Development Plc.	2002	1,047
15	J Avenue	1	Siam Future Development Plc.	2002	1,047
16	La Villa Phaholyothin	1	Siam Future Development Plc.	2002	1,047
17	Major Avenue Ratchotin	1	Siam Future Development Plc.	2002	1,047
18	Pantip Plaza IT Mall	3	TCC Land Commercial Co.,Ltd.	2000	542
19	JJ Mall	1	JJ Mall Co.,Ltd.	2003	100



20	SCB Park Plaza	1	Siam Commercial Bank	1996	70,000
21	Union Mall	1	Siam Jatujak Co.,Ltd.	2003	600
	TOTAL	24			

Outstanding Franchising

No.	Name	No. of Branch (2009)	Management by	Established year	Registered Capital (Million baht)
Restaurants					
1	Anna's Café'	8	Anna's Café	2001	2
2	Auntie Anne's	85	Central Restaurants Group Co.,Ltd.	1989	620
3	Steak Hunter	5	Central Restaurants Group	1989	620
4	KFC	306	Central Restaurants Group (130 branches), Yum Restaurant International (Thailand) Co., Ltd. (176 branches)	1989	620
5	Mc Donald's	100	McThai Co., Ltd.	1983	2,075
6	MK Suki	200	MK Restaurant Co., Ltd.	1989	410
7	BBQ Plaza	76	The Barbecue Plaza Co., Ltd.	1987	250
8	The Pizza Company	244	The Minor Food Group Plc	1993	441
9	Pizza Hut	75	Yum Restaurant International (Thailand) Co., Ltd.	1997	1,960
10	S & P Restaurant	270	S&P Syndicate Plc.	1994	523
11	Chester's Grill	153	Chester Food Co.,Ltd.	1988	320
12	Burger King	23	The Minor Food Group Plc	1993	441
13	Sizzler	42	The Minor Food Group Plc	1993	441
14	Narai Pizzeria	27	Naraipizzeria Co., Ltd.	1987	50
15	A & W	30	A&W Restaurants (Thailand) Co.,Ltd.	1988	70
16	Oishi Ramen	30	Oishi Group Plc.	2003	375
17	Subway	7	Aroy Bread Co., Ltd.	2007	9.7
18	Daidomon	20	Daidomon Group Plc.	2001	216
19	Pepper Lunch	3	Central Restaurants Group Co.,Ltd.	1989	620
	TOTAL	1,704			
Coffer, Ice Cream, Bakery					
1	Black Canyon	203	Black Canyon (Thailand) Co.,Ltd	1993	60
2	Coffee World	60	JFA Corporation (Thailand) Co.,Ltd.	1997	153
3	Starbucks	115	Starbucks Coffee (Thailand) Co.,Ltd.	1998	505
4	Au Bon Pain	35	ABP Café (Thailand) Co.,Ltd.	2005	139
5	Gateaux House	47	Gateaux House Co.,Ltd.	1987	40
6	Caffe d'Oro	65	VPP Progressive Co.,Ltd.	1994	50
7	Ban Rai Cafe	74	Plantation and Farm Design (Thailand) Co., Ltd	1999	1
8	Bon Cafe'	15	Bon Coffee (Thailand) Co.,Ltd.	1991	150
9	Doi Tung Coffee Shop	19	Doi Tung Development Project	NA	NA
10	Swensen's	230	The Minor Food Group Plc	1993	441
11	Dunkin Donuts	185	Golden Donuts (Thailand) Co.,Ltd.	2005	246
12	Mister Donuts	200	Central Restaurants Group Co.,Ltd.	1989	620



13	Baskin Robbins	49	CSC Worldwide Co.,Ltd (Central Group)	1993	150
14	Dairy Queen	233	The Minor Food Group Plc	1993	441
15	Haggen Duz	15	HD Distributers (Thailand) Co.,Ltd.	1994	100
	TOTAL	1,545			

Specialized Stores

No.	Name	No. of Branch (2009)	Management by	Established year	Registered Capital (Million baht)
Drug and Beauty Stores					
1	Boots	131	Boots Retail (Thailand) Co.,Ltd	1996	3,460
2	Watson's	146	Central Watson's Co.,Ltd	1996	103
3	GNC	27	SSUP Total Wellness Co.,Ltd.	1996	50
4	Marks & Spencer	10	Central Retail Corporation	1974	3,335
	TOTAL	314			

Auto Services store chain

No.	Name	No. of Branch (2009)	Management by	Established year	Registered Capital (Million baht)
1	A.C.T. (former name "Max Auto")	67	Bridgestone A.C.T. (Thailand) Co., Ltd.	1996	500
2	B – Quick	63	B-Quick Co., Ltd.	2003	40
3	Cockpit	116	Bridgestone Shells (Thailand) Co., Ltd.	1986	50
	TOTAL	246			

F. Address of Retailers by Category

Department Store & Shopping places

(Central)

Central Department Store Ltd.

7th Fl., Chidlom Tower, 1027
Ploenchit Rd.

Pathumwan, Bangkok 10330

Tel. 66-2 6557777, 6551444

Fax. 66-2 6557477-8

www.central.co.th

(The Mall)

The Mall Group Company Limited

1908, 1909 Ramhamhang Road, Huamark,
Bangkapi, Bangkok 10240 Thailand

Tel: (662) 310 1000

Fax: (662) 369 3295

www.themallgroup.com

(Tang Hua Seng)

Tang Hua Seng Department Store Company Limited

289 Sirinthorn Road, Bangplad,
Bangkok 10700 Thailand

Tel: (662) 434 0448

Fax: (662) 434 6057

www.tanghuaseng.com

(Tokyu Department Store)

TMD Development Company Limited

444 Maboonkrong Center, Pathumwan,
Bangkok 10330 Thailand

Tel: (662) 620 1000

Fax: (662) 620 1001/3

(Emporium Shopping Complex)

The Emporium Shopping Complex Company Limited

622 B Building, 5B Floor, Sukhumvit Road,
Klongton, Klongtoey, Bangkok 10110 Thailand

Tel: (662) 259 9495

Fax: (662) 262 0620

www.emporiumthailand.com

(Central World)

Central World Company Limited

4, 4/1-4/2, 4/4 Ratdamri Road, Pathumwan,
Bangkok 10330 Thailand

Tel: (662) 640 7000

Fax: (662) 255 9771

www.cpn.co.th

(Robinson Department Store)

Robinson Department Store PLC.

2 Silom Road, Suriyawong, Bangrak
Bangkok 10500 Thailand

Tel: (662) 238 0052

Fax: (662) 235 2467

www.robinson.co.th

(Zen)

Zen Department Store

(Central Department Store Ltd.)

4, Central World Plaza, Rajdamari Rd.
Pathumwan, Bangkok 10330

Tel. 66-2 2559667-83

Fax. 66-2- 2559697

www.central.co.th

(Pata)

Pata Department Store

Pinklao Department Store Company Limited

125 Somdej Pinklao Road, Bangyeekhan,
Bangplad, Bangkok 10700 Thailand

Tel: (662) 883 4666

Fax: (662) NA

Website NA

(Isetan)

Isetan (Thailand) Company Limited

World Trade Center Building, 4/1-4/2
Raddamri Road, Pathumwan, Pathumwan
Bangkok 10330 Thailand

Tel: (662) 255 9898

Fax: (662) 255 9716

(Siam Paragon)

Siam Paragon Development Company Limited

4th Floor, North, 991 Siam Paragon Shopping
Center, Rama 1 Road, Pathumwan, Bangkok
10330 Thailand

Tel: (662) 610 8000

Fax: (662) 610 8108

www.siamparagon.co.th

Supermarket

(Foodland)

Foodland Supermarket Company Limited

2675 Lad Prao Road, Bangkok 10310
Thailand

Tel: (662) 530 0220

Fax: (662) 539 0837

www.foodland.co.th

(Siam Jusco)

AEON (Thailand) Company Limited

78 Chaengwattana Road, Anusawwaree,
Bangkhen, Bangkok 10220 Thailand

Tel: (662) 970 1825/30

Fax: (662) 970 1823

www.jusco.co.th

(Top Supermarket)

Central Food Retail Company limited

15-17th Floor, Central Plaza Chaengwattana
Office Tower Building, 99/9 Moo 2,
Chaengwattana Road, Bangtalad, Pak Kret,
Nonthaburi 11120 Thailand

Tel: (662) 831 7300

Fax: (662) 831 7352

www.tops.co.th

(Villa Market)

Villa Market JP Company Limited

595 Sukhumvit Road, Klongton-Nua, Wattana,
Bangkok 10110 Thailand

Tel: (662) 662 1000

Fax: (662) 259 1077

www.villamarket.com

(UFM Fuji)

UFM Fuji Super (Thailand) Company Limited

593/29-39 Soi Sukhumvit 33/1 Sukhumvit
Rd.,Klongton Wattana Bangkok 10110

Tel: 0-2258-0697-9

Fax: 0-2662-0151

E-mail : ufmfuji@ufmfujisuper.com

HYPERMARKET / SUPERCENTER

(Tesco Lotus)

**Ek-Chai Distribution System
Company Limited**

629/1 Moo.10 Nawamintr Rd., Klongkoom,
Buengkoom Bangkok 10230 Thailand

Tel: (662) 797 9000

Fax: (662) 797 9802

www.tescolotus.net

Big C Supercenter PLC.

7th Floor, Univest Building, 89/36 Rajdamri Road,
Lumpini, Pathumwan, Bangkok 10330

Tel: (662) 655 0666

Fax: (662) 655 4521

www.bigc.co.th

(Makro)

Siam Makro Public Company Limited

3498 2nd Fl., Lardprao Road
Klongchan, Bangkok 10240 Thailand

Tel: (662) 723-1000

Fax: (662) 375-2789

www.siammakro.co.th

(Carrefour)

CenCar Company Limited

11 South Sathorn Tungmahamek Sathorn
Bangkok, 10120

Tel: (662-677 3377

Fax: (662) 677 3343/4

www.carrefour.co.th

Convenience stores and G-stores

(7-Eleven)

CP ALL Public Company Limited

119 Tara Sathorn Tower, 12th Floor, Soi Sathorn 5, South Sathorn Road, Bangkok 10120 Thailand
Tel: (662) 648 2501
Fax: (662) 679 0050

www.cpall.co.th

(AM/PM)

AM/PM (Thailand) Company Limited

391/1-23 Soi Ladprao 94, Ladprao Road, Wangthonglang, Bangkok, Bangkok 10310 Thailand
Tel: (662) 935 6901/10
Fax: (662) 934 5040

Website: NA

(Tesco Express)

Ek-Chai Distribution System Company Limited

629/1 Moo.10 Nawamintr Rd., Klongkoom, Buengkoom Bangkok 10230 Thailand
Tel: (662) 797 9000
Fax: (662) 797 9802

www.tescolotus.net

(CP Fresh Mart)

CPF Trading Company Limited

Muang Thai Pattara Building, 255/115-116 22nd Floor, Huay Khuang, Bangkok 10310 Thailand
Tel: (662) 2939-9090
Fax: (662) 693-0584

www.cpfreshmartshop.com

(Select)

Shell Thailand Company Limited

10 Soonthornkosa Road, Klongtoey, Bangkok 10110 Thailand

Tel: (662) 262 6000, 249 0491

Fax: (662) 249-8393

www.shell.co.th

(Star Mart)

Chevron Asia South Company Limited

Building 3, Thai Commercial Bank Plaza, Ratchdapisek Road, Jatuchak, Bangkok 10900

Tel: (662) 545 5555

Fax: (662) 545 5554

www.chevronthailand.com

(Everyday)

Petrona Retail (Thailand) Company Limited

21st Floor, CTI Tower, 191 Rachadapisek Road Klongtoey, Bangkok 10110, Thailand

Tel: (662) 261 5000

www.petronas.co.th

(Family Mart)

Siam Family Mart Company Limited

Vanich 2 Building, 11th Floor, 1126/2 New Petchburi Road, Makkasan, Rajthawi, Bangkok 10400 Thailand

Tel: (662) 254 1632/51

www.familymart.co.th

(V Shop)

Minimart Express PLC.

158/1 Moo 6, Ngarmwongwan Road, Toongsonghong, Laksi, Bangkok 10210 Thailand

Tel: (662) 953 4881/7, 963 4889/90

www.vshopexpress.com

(Mini Big C)

Big C Supercenter PLC.

7th Floor, Univest Building, 89/36 Rajdamri Road, Lumpini, Pathumwan, Bangkok 10330

Tel: (662) 655 0666

Fax: (662) 655 4521

www.bigc.co.th

(108 Shop)

Saha Pathanapibul PLC.

2156 New Petchburi Road, Bangkok 10310 Thailand

Tel: (662) 318 0062

Fax: (662) 319 1678

www.sahapat.co.th

(Tiger mart)

Esso (Thailand) PLC.

3195/17-29 Rama IV Road, Khlong Ton, Khlong Toei, Bangkok 10110 Thailand

Tel: (6638) 493 900 Ext.2650,2892

Fax: (6638) 493 956

www.esso.co.th

(Lemon Green)

Bangchak Greenate Company Limited

555/1 Energy Complex, Building A, 10th floor, Vibhavadi Rangsit Road, Chatujak, Bangkok 10900 Thailand

Tel: (662) 140 8999

Fax: (662) 140 8900

www.bangchak.co.th

(Jiffy)

PTT Retail Management (Thailand) Company Limited

Thai Panit Samakkee Prakanpai Building, 11th Floor, Laksi, Bangkok 10210 Thailand

Tel: (662) 955 0195

www.pttrm.co.th



Category Killers

(Office Depot)

Office Club (Thai) Company Limited

919/555 South Tower, 14th Floor, Silom Road,
Bangrak, Bangkok 10500 Thailand

Tel: (662) 630 3100

Fax: (662) 630 3131

www.officedepot.co.th

(Home Work)

CRC Power retail Company Limited

919/555 Room 1-6, 10, 13th Floor, South Tower
Building, Silom Road, Bangrak, Bangkok 10500
Thailand

Tel: (662) 206 9300

Fax: (662) 630 1634

www.homeworks.co.th

(Super Sport)

CRC Sport Company Limited

919/555 South Tower, 14th Floor, Silom Road,
Bangrak, Bangkok 10500 Thailand

Tel: (662) 630 3100

Fax: (662) 630 3131

www.supersports.co.th

SE-ED (Book store)

SE-EDUCATION PLC.

Nation Tower, 19th Floor, 1858/87-90, Bangna-
trad Road, Bangkok 10260

Tel: (662) 739-8000

Fax: (662)

www.se-ed.com

(Power Mall, Read & Write, Sport Mall, Be Trend)

The Mall Group Company Limited

1908, 1909 Ramhamhang Road, Huamark,
Bangkapi, Bangkok 10240 Thailand

Tel: (662) 310 1000

Fax: (662) 369 3295

www.themallgroup.com

(Home Pro)

Home Products Center PLC.

96/27 Moo 9, Bang Khaen, Mun=ang, Nonthaburi
11000 Thailand

Tel: (662) 832 1000

Fax: (662) 832 1234

www.homepro.co.th

(Power Buy)

Power Buy Company Limited

919/555 South Tower, 14th Floor, Silom Road,
Bangrak, Bangkok 10500 Thailand

Tel: (662) 630 3100

Fax: (662) 630 3131

www.powerbuy.co.th

(B2S Bookstore)

B2S Company Limited

919/555 South Tower, 14th Floor, Silom Road,
Bangrak, Bangkok 10500 Thailand

Tel: (662) 630 3100

Fax: (662) 630 3131

www.b2s.co.th

(Index Living Mall)

Index Living Mall Company Limited

147 Soi Rama II Soi 50, Rama II Road, Samhae
Dam, Bangkhuntian, Bangkok 10150 Thailand

Tel: (662) 898 6420/5

www.indexlivingmall.com

Specialized Stores

(Boots)

Boots Retail (Thailand) Company Limited

97/11, 6th Floor, Rajdumri Road, Lumpini,
Phatumwan,

Bangkok 10330 Thailand

Tel: (662) 251 8811

Fax: (662) 250 4991/2

www.bootsthai.com

(Watson's)

Central Watson's Company Limited

3388/23-24 Sirintra Building, 8th Floor, Rama IV
Road,, Klongtan, Klongtoey, Bangkok 10110

Thailand

Tel: (662) 665 2000

Fax: (662) 367 5510

www.watsons.co.th

(Marks & Spencer)

Central Department Store company Limited

7th Fl., Chidlom Tower, 1027

Ploenchit Rd.

Pathumwan, Bangkok 10330

Tel. 66-2 6557777, 6551444

Fax. 66-2 6557477-8

www.central.co.th

(CNG)

SSUP Total Wellness Company Limited

89/1 Vor Viroj Building, Soi Ratchaphan,
Ratchprarop Road, Makkasan, Rajthevi, Bangkok

10400 Thailand

Tel: (662) 642 6060/9

www.cng.co.th

G. Useful Contacts

ITALIAN TRADE COMMISSION

12A Floor, Bubbajit Building, 20 North Sathorn Road,
Silom, Bangkok 10500 Thailand

Tel: (662) 633 8491/3

Fax: (662) 633 8494

Email: Bangkok@ice.it

URL: www.italtrade.com/countries/asia/thailand/index.htm

EMBASSY OF ITALY

399, Nang Linchee Road, Yannawa, Bangkok 10120 Thailand

Tel: (662) 285 4090/3

Fax: (662) 285 4793

Email: ambasciata.bangkok@esteri.it

URL: www.ambbangkok.esteri.it

THAI ITALIAN CHAMBER OF COMMERCE

1126/2 Vanit II Building, 16th Floor, Room 1601B

New Petchburi Road, Makkasan, Rajdhevee Bangkok 10400 Thailand

Tel: (662) 255 8695

Fax: (662) 253 9896

Email: info@thaitech.org

URL: www.thaitech.org

THAI RETAILERS ASSOCIATION

100/9 Rama 9 Road, Huaikhwang, Bangkok 10310 Thailand

Tel: (662) 645 0422

Fax: (662) 645 0421

Email: info@tra.or.th