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The FFTC Journal of Agricultural Policy

COVID-19 and the New Normal Food Consumption in Thailand

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Received April 16, 2021; Accepted November 3, 2021

ABSTRACT

The food industry significantly contributed to the industrial GDP of Thailand with a strong backward linkage to the agricultural sector, the foundation of Thai economy. In general, Thai households have spent 33.9% of total expenditures on foods and beverages. Previously, Thai consumers focused on emotional value over than functional value since preferences and tastes became the major factors affecting their decisions to consume food products, rather than cleanliness and nutrition. The COVID-19 pandemic had not only brought a serious effect on the lives and livelihoods of people, but also the food consumption of the Thai people. During the spread of COVID-19 pandemic since January 2020, it was found that consumer behaviors were starting to shape the so-called "New Normal" lifestyles. The crisis, however, affected many consumers to change their behavior and their new experiences as shift to fundamental health and caring economy. It is essential to consider key behavior going through the prolonged recovery period; health conscious, digitalization, sanitization, balancing of home and duty and personalized food supply that would become the "New Normal" for Thais affecting food consumptions. As Thai consumers put their cautiousness about health and self-immunity, higher digital engagement, online purchasing and hygienic practices, the food industry needs to observe closely in order to be well-prepared for any changes to meet the needs of consumers. This research aims to review the data of the food industry in Thailand, food consumption amid the COVID-19 pandemic, the "New normal" lifestyle of food consumption and key challenges for the food businesses is presented.

Keywords: Coronavirus, Thai food industry, food consumption, new normal, key challenges

INTRODUCTION

Food industry in Thailand

Thailand has long been called "the kitchen of the world" with a significant mark in the global food industry. In 2019, food industry contributed US$29,479 million, approximately 5.5% of Thailand's GDP and 20.6% of Thai industrial GDP (Food Intelligence Center, 2020). With a strong backward linkage to agricultural sector, the foundation of Thai economy, over 80% of raw material being used in the food industry was locally sourced from the agricultural sector. The total revenue for the Thai food industry was forecasted at US$54,420 million in 2020 with average revenue per capita was US$779.66. The market is expected to grow annually by 2.6% (Statista, 2020). According to Statista (2020), revenue in the food and beverage segment was projected to reach US$ 1,919 million in 2021. Revenue was expected to show an annual growth rate (2021-2025) of 10.46%, resulting in a projected market volume of US$2,856 million by 2025. The food processing manufacturers have registered for 53,642 factories with one million workers who were employed, approximately 19.7% of total industrial sector employment (The Federation of Thai Industries, 2020). Food Intelligence Center (2020) reported that in 2019, the Thai food sector contributed 20.6% to the total industrial GDP while electricity and electronics, automobile, chemical and textile industries were at 13.6%, 11.2%, 9.0% and 4.7%, respectively.

According to Statista (2020), the food market included all kinds of fresh and processed foods. The market was divided into several segments; dairy products and eggs, meat, fish and seafood, vegetables, fruits, bread and cereal products, oils and fats, spreads and sweeteners, sauces and condiments, convenience food, confectionery and snacks, baby and pet foods. Based on the advancement of processing technology, processed foods were categorized into three general categories, which were minimally processed, moderately processed, and highly processed foods (Thailand Board of Investment, 2018). Currently, the food business invested a large number of resources in research and development (R&D) in order to boost their productivity and efficiency and innovative creation such as using computerized systems to control the production processes; for example, ready-to-eat meals and conveniently packaged meat and meat products which all are the subset of the highly processed food.

Urbanization and hectic lifestyles were the main drivers of consumer purchases of highly processed foods. (Thailand Board of Investment, 2018). In addition, the supporting industries including food machinery and equipment, intelligent food packaging and digitalized food services also played significant roles to accelerate the growth rate of the modern food industry. With the growth in smart technologies, entrepreneurs had found several ways to merge technology with food and delivery services. Euromonitor International (2020) reported that there is a market value of key highly processed food segments including ready-to-eat meals (US$616 million), functional drinks (US$1,802.80 million), healthy foods (US$5,980.94 million), supplement and medical foods (US$800 million).

In conclusion, Thailand has long been called the kitchen of the world with its abundant natural resources, highly workforce and strength. Moreover, the 2021 trend of food business in Thailand are Power of plant, Hyperlocal taste, From street to star, Tailored to FIT, Haute Cuisine On-The-Go, Serving Surplus and Hygiene and Safety. Therefore, the food industry needs the way to focus on the food consumption trend in Thailand (Marketing Oops, 2021)

Food consumption of households in Thailand

In 2019, Thailand households' total expenditure amounted to US$659.31 per month, while expenditure on foods and beverages accounted the largest amount at US$223.52 or 33.9% of total expenses (Food Intelligence Center, 2020) as shown on Figure 1.

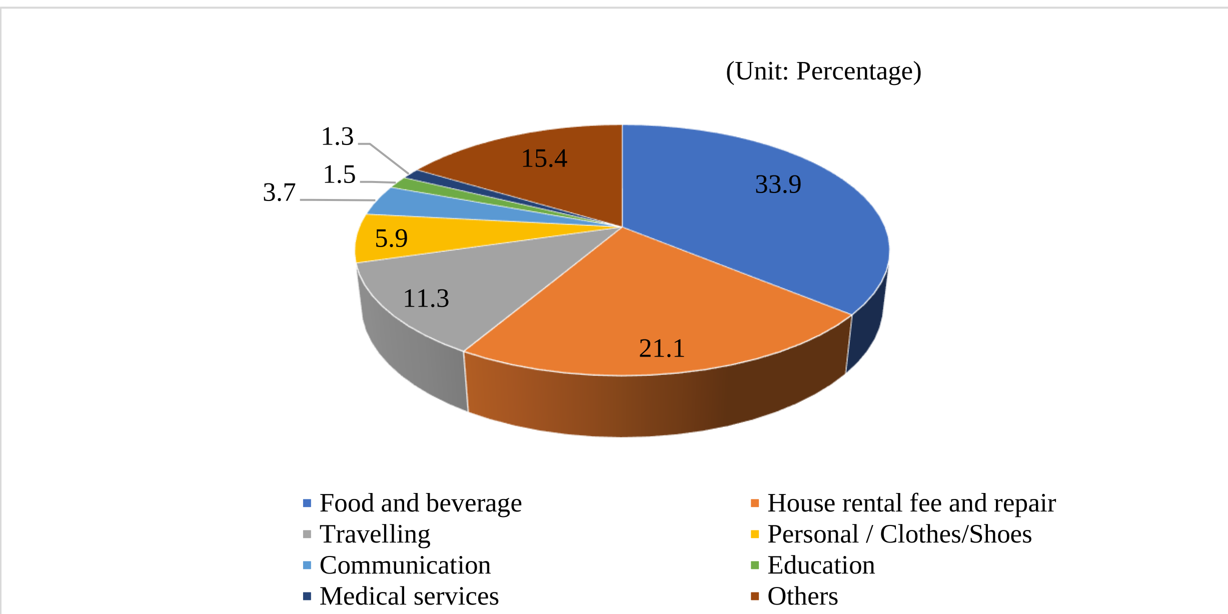

Figure 1 Thai household expenditures in 2019 (monthly average)

Source: Food Intelligence Center (2020)

According to the National Statistics Office survey in 2017, with 28,000 Thai households (National Statistics Office, 2018), the most concern for food consumption of Thai population (above 6 years old) who have average income as US$801.05 (National Statistical Office, 2019)) were preference (22.1%) followed by taste (18.5%) and want (18.2%), respectively. Considering the concept of value analysis (Smith and Colgate (2007), perceived value can be divided into 4 types: functional, emotional and experiences, symbolic and cost value. The four types of perceived value have important key dimensions. When we decided to choose or buy a product which is concerned characteristics, is useful to performing the function. The customer focus on experience when used the product is emotional value. Symbolic value is terms of consumer perception when choosing that brand. Cost value refers to consumer can minimize the time or efforts. Based on the National Statistics Office survey, it can be implied that in general, the Thais gave importance to emotional value over functional value since they consumed foods based on their preferences rather than cleanliness and nutrition of foods (Table 1). Siam Commercial Bank Economic Intelligence Center (2020) reported that Thai people consumed more sweets and salty foods and reduced the frequency of their consumption for fruits and vegetables. There was an increasing number of consumers who reduced their food consumption in their diets. They usually consumed keto diet, limited time of consumption and daily diet (Dailynews, 2021). Furthermore, there was also a marked increase in dietary and food supplements in Thai consumers. The study of food consumption behavior of working age people in Bangkok (2019) indicated that convenience was the most critical factor for food consumption and ready-to-eat meals was the most favorite kind of foods among the working people in Bangkok (Phanwattana, 2019). Both of the studies agreed that emotional and experience value was the critical factor for the Thai people (TA SME, 2020) (Brandinside, 2021)

Table 1. Importance of factor affecting food purchasing behavior categorized by age group

Unit: Percentage

Factors	Total	Age Group (Year)			
		6-14	15-24	25-59	60 and more
Taste	18.5	17.4	19.9	19.2	15.6
Nutrition	12.9	8.0	8.5	13.0	19.5
Price	4.0	2.3	4.0	4.3	4.3
Cleanliness	17.8	11.0	17.0	19.4	17.9
Convenience	6.5	4.7	7.3	7.1	4.9
Preferences	22.0	37.3	24.4	19.6	18.4
Wants	18.2	19.3	18.9	17.4	19.3
Others	0.1	0.0	0.0	0.0	0.1

Source: National Statistics Office (2018)

FOOD CONSUMPTION AMID COVID-19 PANDEMIC

In order to review the situation in Thailand, a qualitative research approach was applied. The main methodology was to review the information from secondary data sources including theoretical background, literature reviews and relevant online data sources. Content analysis was used to analyze for the specific interested point. Since the COVID-19 pandemic hit Thailand in early 2020, the Thai economy was projected to contract by at least 5% in 2020 due to the weaker global demand, no international tourists arrived, and this caused a decrease in private consumption which had the retail and recreation sectors getting the most impact (World Bank, 2020). Lockdowns and social distancing measures affected domestic spending especially face-to-face businesses including tourism, travel, recreation, horeca (horeca stands for hotel, restaurant, and catering) (Porntipa and Ajchara, 2013), as well as high-priced items (Siam Commercial Bank Economic Intelligence Center, 2020a). The Thai government had the policy to issue measures to help businesses and the public in particular social security US$153.94 cash handouts per person who are living in the red area including 10 provinces (Thairath, 2021), with packages amounting to 12.9% of GDP focusing on providing relief to vulnerable households and affected firms. The packages included the relief measures of cash transfers to households and infrastructure projects in the local economy and several instruments (World Bank, 2020).

Siam Commercial Bank Economic Intelligence Center (2020b) reported the COVID-19 impact by industry. Food and beverage industry relatively got less affected from the crisis due to the lockdown and social distance measures than other industries. According to Nielsen Retail Index, FMCG (Fast Moving Consumer Goods) market growth during February-March 2020 significantly increased through all channels from modern to traditional trade. Considering food and beverage products, it was found that shelf-stable and ingredients presented the drastic growth, particularly eggs, edible oil, rice, canned fish, functional drink, instant noodles, sugar, instant coffee and biscuits (The MOMENTUM, 2020). Thai consumers responded to the lockdown by stocking up their shelves with stable foods while reducing the consumption of luxury foods such as bird’s nest drink, energy drink, candies and snack foods (The MOMENTUM, 2020).

Regarding consumption behaviors and lifestyles, Thai consumers have changed their habits during the crisis as seen from the survey of "Suan Dusit Poll" (Chalauysup, 2020). Thais were staying home (89.60%), had more concern for health (85.30%), considered food nutrition when purchasing foods (62.77%) and increased their social network communication (59.16%). Insights of consumer behavior during the COVID-19 pandemic were conducted by Wunderman Thompson and DATTEL (Marketing Oops, 2020) and it was found that food and beverage products were continually purchased with the same quantity or more. Instant noodles were the most increased purchasing product, which rose up to 52%. Convenient stores were considered to be the most preferred channel to purchase and online channel was increasing in transactions among middle income consumers.

The noticeably changing lifestyle and consumption behavior of the Thai people during the COVID-19 pandemic is summarized in Table 2.

Table 2. The changing lifestyle and consumption behavior of Thai people during the COVID-19 pandemic

Lifestyle and behavior	What/How they consumed	Example
• Work from home: Consumers connected to the world by internet and do food online shopping. (including senior people)	• Consumers purchased from new E-marketplaces and social commerce e.g. E-marketplace of universities, school and institution. The case of University marketplace showed that the total sales increased up to 90% (RYT9, 2020). • Food delivery service was pervasive. Online food delivery service has increased three times from the same period last year (Salika, 2021). • E-payment became more popular for cashless society.	  
• Consumers were getting used to physical distancing. • Consumer considered individual food consumption.	• Consumers were seeking for fulfillment in their homes e.g. fun and healthy cooking, brewing special coffee or juice or growing backyard with vegetables or flowers. The report from online platform mentioned that cooking at home was the top 5 activities of Thai consumers during the COVID-19 pandemic (MGR online, 2020). • Consumers preferred to consume fast foods and use online media at home.	 

Lifestyle and behavior	What/How they consumed	Example
• Consumer's happiness was redefined. • Consumers bought new luxuries at home e.g. cooking utensils are trendy and healthy.	• Consumer's cooking and using new utensils became a part of maximizing that happiness. As a result, the growth rate of utensils purchase increased 63% during COVID-19 (Smart SME Channel, 2020).	
• Consumer's state of mind focused and family mattered more. • New activities with families at home e.g. cooking at home that brought family together.	• Consumers favored of DIY snack foods or bakeries at home. • Meal kits were increasing in demand. There was an evidence that many famous restaurants launched the new meal kits during the COVID-19 pandemic (Wongnai, 2020).	 
• Consumers raised the bar for health and wellness so they prioritized food safety. • Consumers focused on higher personal hygiene than ever before. • Consumers were afraid of transmission of diseases from animals	• Consumers provided trust on safety of goods or services. The famous restaurants announced the safety plan to encourage sanitization and safety (Posttoday, 2020). • Consumers selected safe foods, safe packaging, safe delivery and traceability. • Consumers preferred foods with natural ingredients and locally sourced. • Consumers preferred plant-based protein, immune boosting foods e.g. herbal, functional foods and beverages.	 

Source: GroupM Thailand (2020) DATTEL (2020) Author's analysis
Photo source: Family Bites (2011), Siam PR (2014), Anonymous (2015), RYT9 (2019) Anonymous (2020a), Anonymous (2020b), Central (2020), Destination Riyadh (2015), Entrepreneur Asia Pacific (2020), Johns Hopkins Medicine (2020), Kitchn (2020) and Google site (2020)

"NEW NORMAL" LIFESTYLE OF FOOD CONSUMPTION

The COVID-19 pandemic has shown that Thai consumers' lifestyle and behavior were remarkably adaptive to this uncertainty. In the short term, consumers initially prepared by purchasing storable food stocks for lockdown, increased online purchase of foods and home deliveries in order to align with social distancing, awareness of the benefits from a healthier diets and lifestyle, etc. In the long run, consumer experiences may have taken on a new dimension from changing their perspective, attitude and lifestyle until getting used to a completely changing environment (Brand Buffet, 2020). The COVID-19 pandemic led to consumer adaptation to the "New Normal" lifestyle and behavior. New Normal, means the new lifestyle that are different from people lifestyle before caused by affecting of something. It changed people life and their society to the new way that difficult to predict and never happened with them before (ThaiPBS, 2020). It is expected that the "New Normal" will occur in the post COVID-19 era. It is essential to identify some key "New Normal" lifestyle of Thais food consumption behavior:

1. Being health conscious: Consumers gave attention to preventive healthcare. Generation Y were born during 1981-2000 or early working age population (Kanokwara and Sanit, 2021). People are increasingly focusing on healthcare and expanding across all generations. This may cause from the data reporting that being healthy can protect yourself from viruses (Boonyen, 2020). Group M Thailand (2020) reported that Thais will become more rationale consumers. They will choose to buy more healthy and sanitary products such as fresh produce to cook at home and beverages that can strengthen the immune system. As a result, the demand for functional foods and beverages and herbal supplements for immunity enhancement will continue to rise.
2. Digitalization: The digital world will not just be a part of life, but there is now such a thing as a digital life. (Brand Buffet, 2020). This behavioral change is partly caused by practicing social distance by staying or working at home. Consumers use mobile phones or online media as a life facilitator for convenient lifestyle ranging from purchasing household products, foods, and other essential appliances. It can be said that there is less barrier between purchasing from the store and online anymore or Online-Merge-Offline (OMO) (Group M Thailand, 2020). After this crisis has ended, it can be predicted that consumers will continue to enjoy purchasing products online and foreseeing the sales of ready-to-eat, fast and convenient foods from E-commerce. This trend has been predicted to continually increase.
3. Sanitization: Consumers will continue embracing physical distancing and less of human touch. Personal product for self-sanitation will continue to become a usual behavior, with an extension of consumer expectation for all shops to facilitate cleanliness and hygiene. Consumers also expect stores to place hand sanitizers as well as cleanliness guaranteed packaging. Personal space and touchless self-service will create a new shopping experience. Research from Kantar (Group M Thailand, 2020) showed that 65% of Thais are more concerned about food safety and country of origin. Consumers prefer to select natural ingredients and locally sourced food, safe packaging, safe delivery and food traceability system.
4. Balancing of home and duty: After working at home for a certain period of time, consumers or employees begin to better understand the meaning of balancing work and personal life. Consumers consider working from home in order to manage life efficiently which is possible in the future. As this situation has evolved, where and how consumers are eating has changed, with more choices to purchase foods to eat at home and food delivery will become more pervasive (Nielsen, 2020). Urban lifestyle consumers prefer to purchase from E-marketplaces, E-retailers and social commerce beyond the traditional offline stores. Further, Do It Yourself (D.I.Y) snack foods, homemade bakery and meal kits will increase in demand as a result of the physical reconnection of the family, particularly, family with young children.
5. Personalized food supply: Consumers pay more attention to personalization in food choices. They will carefully search for details and ingredients when choosing to buy food products, aside from considering price or benefit (IPG Mediabrands, 2020). The demand for food solution or designed food to meet the unique needs of each individual may become more attractive, for examples, vegan foods, plant-based protein, food for diabetes, gluten-free and organic foods. Thus, highly processed foods with biotechnology, supplement and medical foods will be aligned with consumer preferences and become an alternative for consumer wellness.

The shift in customer experiences to the “New Normal” lifestyle that resulted from the pandemic crisis may change consumer preferences for food consumption in the future since consumers became aware of their health and wellness. They focused more on sanitization of food consumption. Maslow's hierarchy of needs (Figure 2) is a theory of human motivation which can be used to analyze the need for food consumption of Thai consumers towards the “New Normal” lifestyle.

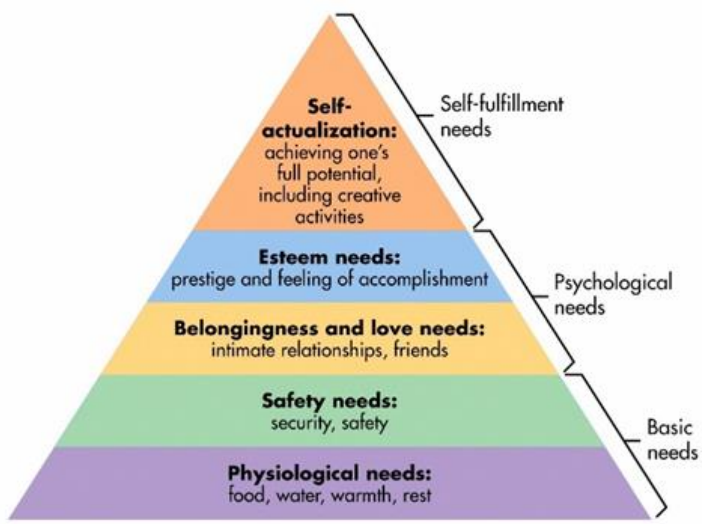

Figure 2 Maslow's hierarchy of needs (1954)
Source: McLeod (2020)

Considering Maslow's Hierarchy of Needs (1954), the Thai consumers will return to focus on the basic needs that are Physiological needs. Consumers would prefer to spend on food consumption focusing on value for money over than aesthetic and premium prices. In addition, they will give priority to security and safety needs with the consumption of clean, safe, nutritious foods in order to protect their families and do self-caring activity more than ever. Moreover, consumers focus more on sanitization of food consumption. These behaviors represented the new normal of being health conscious, and sanitized and personalized food supply. For love and belonging needs, consumers are more connected to others through digitalization and purchased foods from E-commerce because of physical distancing. Paranoia in the virus causes consumers to buy food to be consumed at home and purchase food ingredients which they cook themselves. The COVID-19 pandemic becomes a major catalyst, causing consumers to focus their immune systems in order to have preventive actions against the pandemic. As a result, preventing immune system is a Thai consumer behavior that looks for fresh fruit which contains high vitamin C, functional food and storable foods with longer shelf life and nutritious and healthy foods. Fresh and healthy fruits and vegetables are rising in demand as well. Finally, they will give relatively less importance to esteem and self-actualization needs than ever in the past.

The "New Normal" lifestyle has shown that Thai people are facing an uncertainty from the crisis so they focus on the fundamentals of care and concern (McKinsey and Company, 2020). People need to keep their families safe from the foods they can trust. It can be concluded that food consumption behavior moves toward the selection of cooking ingredients and looking for the menu that provide nutrition and meet sanitary standards. Consumers will choose the food retails and food services which show high standard of hygiene and cleanliness. The use of individual dish, spoons, folk and cutlery will become a common way of dining habit that all consumers are happy to do (Foodee, 2020). They will be careful when choosing to eat any kinds of meat that they are not familiar with. Local brand foods and beverages would become more in demand as a result of trust and traceable products. Finally, physical distancing causes an increased consumption of online media and significantly accelerated E-commerce of food business.

The COVID-19 pandemic has attacked all countries in the world including Thailand. One of the government policies was carrying out restrictions on community interaction or physical (social) distancing. However, the physical distancing policy would inhibit the rate growth in economic and social activities. The restriction policy has created the new trend called "New Normal" that actually was already underway. There will be the challenge for the food businesses, particularly to increase resilience or the ability to successfully adapt to changing circumstances including the consumer's work from home lifestyle, digital and online activities, health and sanitary focused and personalization.

KEY CHALLENGES FOR FOOD BUSINESS

Since Thailand had confirmed the first Corona virus case on January 13, 2020, by the Ministry of Public Health, the pandemic could take a long time to recover, which will shape consumer behaviors to the "New Normal" (Marketing

Oops, 2020). The government keeps repeating that in the "New Normal" Thailand, people must not let down their guard to prevent a new phase of Covid-19. The government must do the same (TDRI, 2021). While Thai consumers were anxious of the future, they were preparing and taking precautions to adjust themselves to a new way of living. The food businesses need to be observed more closely in order to be well-prepared for any changes that the future may bring. The impact of COVID-19 pandemic that causes the challenges related to strategic issues for food businesses need to be considered as:

1. Key challenges for food manufacturers
   The research reveals that Thai consumers' purchasing decision are staked more on a brand's value proposition, more than just simply price (GroupM Thailand, 2020). Since consumers pay more attention to the quality and safety of the product. Therefore, it is not only a challenge, but also an opportunity for quality competition instead of price. Food manufacturers need to prepare upgrading the supply chain and logistics operations to become proactively aligned with suppliers and prepare for the rebound in consumption. Building online merges with offline (OMO) marketing, digital capabilities and continuously innovate business models need to be focused. Food manufacturers are facing challenges such as 1) require safer and higher standards for production, 2) encourage on local consumers and domestic consumptions, 3) understand consumer lifestyles and behaviors, 4) apply digitalization system and E-commerce, 5) develop technology and cold chain for perishable products and fresh food delivery, 6) develop packaging to increase shelf life, 7) innovate processed foods for healthy and immune boosting system, and 8) create brand trust and traceability system.
2. Key challenges for food retails
   Food retail values in the Asian market has increased up to 20-25% per week since January 2020 (Food Intelligence Unit, 2020). Covid-19 is the catalyst to omni-channel (O2O) or New Retail that offline to online and online to offline (Marketing Oops, 2020). However, Thai consumers have shown an increase in online spending across a variety of goods and services, with 41% of consumers who reported using a food delivery service during the crisis (GroupM Thailand, 2020). Similarly, home delivery has gone from a convenience to a necessity since consumers reduced a number of shops visiting trips. Rapid development of digital functionalities is a key to ensuring continuity of food retails after the crisis. Food retails are facing the following challenges: 1) seek for safer and higher standards of product and stores; 2) offer health and wellness values; 3) build a strong foundation for E-commerce to meet the customer demand; 4) use data analytics with customers big data for identifying personalized solutions; 5) find partnerships in logistics service providers; 6) strengthen online merges with offline channel (OMO); and 7) design for innovation such as virtual store and lifestyle mall.
3. Key challenges for food services (Restaurant)
   The food service sector is highly affected by the lockdown and emergency decrees announcement during the crisis. Nielsen (2020) found a high demand for more takeaway and home deliveries of foods in Thailand. Many consumers used to eat out in restaurants, but home cooking has become a new habit that the Thai people will need to adjust to. Hence, on-the-go lifestyles and value the convenience of on-the-go food offerings will be highly demanded, especially by urban consumers. The restaurants and other out-of-home businesses need to consider adjusting their stores to meet the new demand. Food services are facing challenges such as 1) going online and service delivery with digital platform, 2) being used to restaurant signature dishes appearing on shelves, 3) seeking for safer and higher standards for products and services, 4) adapting to hygienic and social distancing measures, and 5) having food deliveries with microwaveable packaging, hygienic packaging or sealed personalized packaging.

CONCLUSION

In Thailand, the food industry has a strong backward linkage to agricultural sector with 80% of locally sourced raw materials. The Thai food market is expected to grow annually by 2.6% and Thai households paid 33.9% of total expenditure on foods and beverages. In 2018, National Statistics Office (NSO) reported that Thai consumers gave importance on emotional value over than functional value since they consumed foods based on preferences and tastes rather than cleanliness and nutrition. During the spread of COVID-19 pandemic in Thailand, it was found that consumer behaviors were starting to shape to the "New Normal" lifestyles. After the COVID-19 situation has evolved, food consumption behavior has been changed for both pattern and diet choices upon their lifestyles. Consumers raised their concerns on health and wellness, so they prioritized on food safety and personal hygiene than ever before. Five types of behavior can be foreseen going through the prolonged recovery period: health consciousness, digitalization, sanitization, balancing of home and duty and personalized food supply that would become the "New Normal" for Thais as far as food consumption is concerned. Even people return to their daily routines, but there will be focus on cautiousness about health and self-immunity, higher digital engagement, online purchasing and hygienic practices.

Dealing with the COVID-19 crisis and its aftermath could be the biggest challenging tasks for the food industry. All food businesses including food manufacturers, food retailers and food services are confronting this “New Normal” changing consumer behavior. In general, the Thai food industry must aim to have higher food safety or create food safety culture, increase in brand trust on food quality, and promote hygiene and safety. The drive towards digital transformation of food business sector needs to be considered to achieve the business development in the “New Normal Era.” Regarding the policy to help businesses and SMEs, the Thai government has provided financial assistance to the affected businesses including the provision of soft loans with low interest rate for five years and asset warehousing for temporary debt relief. In addition, Bank of Thailand has issued a measure to provide the loans for small-scale merchants, shop-owners and freelancers who got affected by COVID-19 (Thairath, 2021).

ACKNOWLEDGEMENT

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