POTENTIAL IMPACT OF THE PROPOSED EU-THAILAND FTA ON THAI ORCHID EXPORTERS.

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งานวิจัยนี้ศึกษาผลกระทบของการค้าเสรีสหภาพยุโรปกับไทยต่อผู้ส่งออกกล้วยไม้ในไทย โดยมุ่งเน้นไปที่จุดแข็งและจุดอ่อนของผู้ส่งออกกล้วยไม้ไทย รวมถึงโอกาสและอุปสรรคในภายภาคหน้า ข้อมูลที่ได้จากการวิจัยได้มาจากการวิเคราะห์ข้อดีและข้อเสียของข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับไทย ข้อมูลที่ปรากฏในงานวิจัยนี้ใช้การวิเคราะห์เชิงปริมาณและเชิงคุณภาพ โดยการวิเคราะห์เชิงปริมาณใช้แบบสอบถามเกี่ยวกับทัศนคติผู้ส่งออกกล้วยไม้ในไทยจำนวน 96 คนที่อาศัยอยู่ที่กรุงเทพฯและปริมณฑล ในส่วนของการวิเคราะห์เชิงคุณภาพนั้นได้จากการสัมภาษณ์เชิงลึกกับเจ้าหน้าที่ของรัฐและผู้เชี่ยวชาญจำนวนทั้งสิ้น 5 คน ซึ่งได้ดำเนินการตั้งแต่เดือนพฤศจิกายน 2555 ถึงเดือน เมษายน 2556

การวิเคราะห์สภาวะแวดล้อมและ Porter’s Five Forces ของผู้ส่งออกกล้วยไม้ไทยพบว่ามีปัญหาทั้งจากปัจจัยภายในและภายนอก เช่น การขาดความเข้าใจเกี่ยวกับกฎระเบียบและอุปสรรคที่ไม่ใช่ภาษีอากรของการส่งออกกล้วยไม้ของสหภาพยุโรป โดยปัญหาหลักคืออุปสรรคที่ไม่ใช่ภาษีอากรของการส่งออกกล้วยไม้เกี่ยวกับมาตรฐานสินค้า กฎระเบียบและเอกสารการส่งออก รวมถึงการขาดการสนับสนุนจากรัฐบาลไทยด้านการพัฒนาระบบการผลิต ทั้งนี้ข้อจำกัดกล่าวได้ส่งผลกระทบต่อกล้วยไม้ไทยซึ่งเป็นสินค้าประเภทที่เน่าเสียได้ง่าย ผลของการศึกษาแสดงผู้ส่งออกกล้วยไม้ไทยให้ข้อมูลเชิงบวกเกี่ยวกับการค้าเสรีสหภาพยุโรปกับไทย เฉพาะอย่างยิ่งในเรื่องข้อได้เปรียบทางการแข่งขันของผู้ส่งออกกล้วยไม้ไทย รวมถึงโอกาสที่มาจากการสนธิสัญญาการค้าเสรีที่ทำให้อุปสรรคทางภาษีอากรและอุปสรรคที่ไม่ใช่ภาษีอากรลดลง ผู้ลงทุนรายใหม่ และการพัฒนาเทคโนโลยีด้านการผลิต ผลประโยชน์ที่อาจจะเกิดขึ้นจากการเจรจาการค้าเสรีสหภาพยุโรป-ไทยจะใช้แก้ไขปัญหาของผู้ส่งออกกล้วยไม้ไทยซึ่งเป็นสินค้าที่เน่าเสียง่ายได้ การเจรจาการค้าเสรีสหภาพยุโรป-ไทย มีความก้าวหน้าไปในทิศทางที่จะเอื้อประโยชน์ต่อผู้ส่งออกกล้วยไม้ไทยเนื่องจากอุปสรรคทางภาษีอากรและอุปสรรคที่ไม่ใช่ภาษีอากรลดลง อีกทั้งเป็นการเปิดตลาดสหภาพยุโรปต่อผู้ส่งออก อย่างไรก็ตามการเจรจาในครั้งนี้ต้องเจรจาด้วยความระมัดระวังและปกป้องผลโยชน์ของผู้ส่งออก เพราะฉะนั้นประเด็นที่ควรจะนำมาพิจารณา คือ การเตรียมความพร้อมและให้ความรู้ผู้ส่งออกกล้วยไม้ไทย

สาขาวิชา ยุโรปศึกษา | ลายมือชื่อนิสิต ....

ปีการศึกษา 2556 | ลายมือชื่อ อ.ที่ปรึกษาวิทยานิพนธ์หลัก ....

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AREEVAN JOEMPHAETCHANYA: POTENTIAL IMPACT OF THE PROPOSED EU-THAILAND FTA ON THAI ORCHID EXPORTERS.. ADVISOR: CHANTAL HERBERHOLZ, Ph.D., 4 pp.

This research examines the potential impact of the proposed Free Trade Agreement (FTA) between the European Union (EU) and Thailand on Thai orchid exporters to identify strengths and weaknesses of Thai orchid exporters and opportunities and threats ahead of them. It analyses Thai orchid exporters' perceptions towards the EU-Thailand FTA, focusing on advantages and disadvantages for Thai exporters. The opinions of Thai government officers and experts on the EU-Thailand FTA are considered as well. The research uses data collected from a survey of 96 Thai orchid exporters in the Bangkok Metropolitan Area and in-depth interviews with Thai government officers and experts, conducted from November 2012 to April 2013, supplemented with secondary data.

Thai orchid exporters are found to have problems with internal and external factors such as lack of understanding about EU’s regulation and Non-Tariff Barriers (NTB), which were examined by SWOT analysis and Porter’s Five Forces. The main issues for Thai orchid exporters are NTB such as standards, regulations and trade document requirements, given that orchids are time perishable goods, combined with a lack of government support in production development. The results further reveal that Thai orchid exporters perceive the proposed EU-Thailand FTA to have a positive impact on exports of Thai cut orchids to EU markets. Possible benefits cited include the opportunity to increase sales due to lower tariffs and NTB, develop production technology and attract new investment. Hence, the potential benefits from the EU-Thailand FTA are perceived to help overcome some of the problems Thai cut orchid exporters are facing, especially if these are support by the Thai government through education, preparation and cooperation.

Field of Study: European Studies — Student's Signature ....

Academic Year: 2013 — Advisor's Signature ....

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CHAPTER I

INTRODUCTION

1.1 Statement of the problem

Early 2013, the European Union, or the EU, officially announced the termination of Generalized System of Preferences (GSP) granted to Thailand, with effect from 1 January 2014. This is attributed to the fact that Thailand has evolved into an upper-middle-income country since 2011[1]while lower-middle income economies are designated as GSP beneficiary countries. This has a negative impact on 26%of the total Thailand's export value to the EU, which is equal US$ 2,423 million[2] of a total export value US$ 9,321 million. In this regard, the loss of GSP coverage for Thai orchid exporters has been estimated at US$ 1.1 million per year.

The GSP can be defined as privileges of trade tariffs given by developed countries, in this case the EU. In order to receive the GSP, Thailand must follow the Council Regulation EC 2501/2001, which is referring to a set of requirements such as the implementation of international convention of human and labor rights, environmental protection, an anti-drug production and trafficking campaign, and, especially, being a lower income country, a status for which Thailand is no longer eligible.[3]

[1] The World Bank. 2011. **Changes in Country Classifications** [Online]. Available: http://data.worldbank.org/news/2010-GNI-income-classifications

[2] Office of Commercial Affair in Brussels 2012. The use of GSP in each sector of Thailand. Brussels.

[3] United Nations, 2008. **Handbook on the Scheme of the European Community**,New York and Geneva, United Nations.

Under the GSP scheme, the EU provides a zero or low rate tariff to recipient countries on specific items. From 2009 to 2011, Thailand received benefits from the GSP tariff reduction around US$23 billion[4] in goods exported to the EU, totaling 62% of its export under the GSP system. According to the Thai Department of International Trade Promotion, 50 of Thai export products, worth US$3 billion in 2011, and 78 million in margin of preference will be suffering from the first year of GSP removal the EU[5]. In addition, Thai orchid exporters will be losing US$ 1.3 million[6] in total export when the 8.5% of the Most Favored Nation (MFN) tariff rate applied in 2014 after GSP.

In 2013, the Thai government was starting negotiation on the FTA (Free Trade Agreement) with the EU that hope of compensating the loss of the GSP. According to the Thai Department of Foreign Trade, the attempt has been part of a long-term solution to minimize the impact of the GSP removal[7].

The ongoing FTA negotiation between the EU and Thailand might be the solution to the GSP issue. In essence, the FTA aims to eliminate tariffs similar to the GSP, and also Non-Tariff Barriers (NBT)such as Sanitary and Phytosanitary regulation (SPS), which involves plant health control and product safety, the main issue for Thai

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4 DFT (Department of Foreign Trade) 2011. **Trade Perference Journal 4th Quarter**.

5 Margin of preference is the difference between the MFN rate and preferential rate in this case the GSP rate.

6 คณะกรรมการกล้วยไม้แห่งชาติ (National Orchid Committe). ยุทธศาสตร์การแข่งขันกล้วยไม้ไทยในตลาดโลก พ.ศ. 2554-2559 (Thai Orchid's competitive strategic in the world market 2011-2016). Bangkok: คณะกรรมการกล้วยไม้แห่งชาติ.

7 Department of Export Promotion 2011. **Annual report**, Bangkok Department of Export Promotion.

orchid exporters today[8], and the ROO (Rules of Origin).As for the mutual recognition arrangement (MRA), the topic is one of the EU's approaches in eliminating technical standards by testing for conformity according to the EU's regulations in accredited testing establishments[9].But the contents of the negotiations are still not available to the public.

If the EU-Thailand FTA manages to reduce or eliminate tariffs and non- tariff barriers (NTB) regarding standard regulations involving quality control and consumers' safety, it will provides benefits and assist in the Thai cut orchid export industry, which was in 2009 worth US$ 79.3 million with the export value ranged between US$60 and 80 million from 2009 to 2011.[10] These are concerns over the impacts of the EU-Thailand FTA among exporters and the government.[11] Thai orchid is expected to be one of the products highly affected since 47% of total Thai orchid's production is exported to the EU and 28% of orchids sold in the EU are sourced from Thailand[12]. Thai orchid exporters are currently receiving a zero percentage tariff but the tax will be rising to 8.5%[13] in 2014 based on the MFN (Most Favored Nation), which better than normal rate of 12%. However, some of competitors (such as Vietnam) are still eligible for the GSP program.

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[8] Food and Agriculture Organization of the Untied Nations. 2003. WTO Agreement on Agriculture: The Implementation Experience - Developing Country Case Studies. Rome.

[9] Geest, W. v. d. 2004. **An EU-ASEAN Free Trade Agreement: Sharing benefits of globalisation?** Asia Europe Journal, 2, 201-219.

[10] The Customs Department of Thailand. 2012. **Export Statistics** [Online]. Available: http://internet1.customs.go.th/ext/Statistic/SubStat2550.jsp?hscode=06031300&statType=export&productCodeCheck=Y&countryCheck=null&country=&month=1&year=2555

[11] Ibid.

[12] Office of Commercial Affair in Brussels 2012. The use of GSP in each sector of Thailand. Brussels.

[13] Europa. 2013c. **Import Tariffs** [Online]. Brussel: Europa. Available: http://exporthelp.europa.eu/thdapp/display.htm?page=it/it_Introduction.html&doctype=main&languageId=EN [8 April 2012].

This research focuses on the impacts of the EU-Thailand FTA on Thai orchid exporters in term of sales, cooperation, development and other opportunities from changes of tariff barrier, NTB such as SPS (Sanitary and Phytosanitary regulation) and ROO (Rules of Origin) and effects on trade facilitation. The changes might come from the EU-Thailand FTA negotiation may provide benefit Thai orchid exporters.

Strengths, weaknesses, opportunities and threats local and overseas for Thai orchid exporters will be analyzed. The study also takes into consideration potential impacts of trade liberalization and facilitation posed by the EU-Thailand FTA. Finally, this research investigates potential impacts on Thai orchid exporters and their perspectives on the EU-Thailand FTA.

1.2 Research Question

According to the problems discussed above, the researcher poses the following research question:

What are the potential impacts of the proposed EU-Thailand FTA on Thai orchid exporters?

1.3 Research Objectives

This research aims:

Main objective

To analyze the potential impact of the proposed EU-Thailand FTA on Thai orchid exporters focusing on tariff and NTB

Specific objectives

1. To understand the content and direction of the EU-Thailand FTA
2. To review and synthesize the literature that deals with the impact of FTAs (focusing on trade liberalization and trade facilitation measures) on exporters of time-sensitive goods, such as perishable agricultural products
3. To analyze the strengths ,weaknesses, opportunities and threats of Thai orchid exporters and the possible problems they are facing

1.4 Scope of the Research

This study concentrates on potential impacts of the EU-Thailand FTA on Thai orchid exporters by using data collected through a survey and in-depth interviews. Conducted in December 2012 through various channels such as telephone, mail, and drop-off, the survey questioned 123 Thai orchid exporters in Bangkok Metropolitan Area, who were registered with the Thai Ministry of Agriculture and Cooperatives, and was focused on SME (Small and Medium Enterprise) exporters[14] who have 40% of total the market share in Thai cut orchid exports and only cut orchids because the export value is higher (see in Chapter II).Compared to large Thai orchid exporters, 90%[15] of SME fail to possess their own production lines, capital and technology in production, which may result in inferior degree of quality of Thai orchid.

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14 สำนักพัฒนาระบบและรับรองมาตรฐานสินค้าพืช. (**Plant Standard and Certification Office)** 2011**a.** รายชื่อผู้ส่งออก กล้วยไม้ (**List of Orchid exporters)** [Online]. สำนักพัฒนาระบบและรับรองมาตรฐานสินค้าพืช. Available: http://www.doa.go.th/psco/index.php?option=com_content&view=article&id=87:2010-11-03-03-13-57&catid=44:download [09 สิงหาคม 2555]

15 Office of Agricultural Economics, 2004. The Study of Potential of Thai Orchid Market in Japan. Bangkok: Ministry of Agriculture and Cooperatives.

Furthermore, their supply may even come from orchid framers who cultivate and harvest orchid without quality control.

In-depth interviews were conducted from November 2012 to April 2013 with government officers from the Department of International Trade Promotion, the Department of Trade Negotiation, and the specialists on the EU-Thailand FTA and agriculture from Kasetsart University and the Ministry of Agriculture and Cooperatives.

1.5 Benefits of the Study

Thailand is negotiating EU-Thailand FTA with the EU, this research is significant in the sense that result of research can provide information about the EU-Thailand FTA and potential impact of the FTA, the discussion on strengths, weaknesses, opportunities and threats of Thai orchid exporters base on perspective of Thai orchid exporters, specialists and government officers. If the outcome is positive, the FTA could help reduce or eliminate tariff and NTB against Thai orchid exporters. Also the EU-Thailand FTA might influence cooperation between Thai orchid exporters and Thai government in sharing information about policies and problems in export Thai orchid including government support in sustainable development which can increase standard quality and export volume.

CHAPTER II

THAI ORCHIDS INDUSTRY

2.1 Overview

Thailand is one of the largest orchid producers in the world with billion baht of export value base on the fact that Thai orchid has several unique criteria such as it can last longer than other cut flowers and has varieties in sizes, colors and species. The main production of Thai orchid is well stain Bangkok Metropolitan Area covering 23,000 rai with production capacity of 52,500 tons of orchids per year[16]. There are nine leaders in the Thai orchid sector. Each of which exports over 300,000 kg of products, resulting in a 60% share of the total cut orchid export per year.[17] Orchid plants cover only 5% of the total Thai orchid production in Bangkok Metropolitan Area. The reason why cut orchids have a larger production because they generate far higher revenue than that of orchid plants. For example, in 2009, the value of cut orchid export was reported at US$ 62 million, while the orchid plant business grossed merely US$ 9.6 million[18].

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[16] DITP. 2011. **Thai Orchid Situation** [Online]. Bangkok: Department of International Trade Promotion. Available: http://www.thaitrade.com/trade_detail.php?id=87 [27 August 2012].

[17] The Customs Department of Thailand. 2012. **Export Statistics** [Online]. Available: http://internet1.customs.go.th/ext/Statistic/SubStat2550.jsp?hscode=06031300&statType=export&productCodeCheck=Y&countryCheck=null&country=&month=1&year=2555

[18] -------. 2009b. **Statistics of cut orchid in 2009** [Online]. United Nations Commodity Trade Statistics Database. Available: http://comtrade.un.org/db/dqBasicQueryResults.aspx?cc=060313&px=HS&r=all&y=2009&p=0&rg=2&so=9999&rpage=dqBasicQuery&qt=n

Table 1:Export value of Thai orchids in 2009 (USD)

HS. Code[19]	Description	Destinations			
		2009		2010	
		World	EU	World	EU
0602909000 1	Orchid Plant	9,655,631	1,751,463	9,709,311	1,933,568
O60313000 0	Cut Orchid	62,703,462	13,072,756	72,900,359	13,320,967

Source: Information and Communication Technology Center of Ministry of Commerce with Cooperation of the Customs Department

These larger companies tend to have more experience and capital in investment in production and marketing technology, including the knowledge about custom regulations and consumer behavior. The rest of 40% belong to SME Thai orchid exporters, 177 of whom are locates in Bangkok Metropolitan Area and also export to the EU. The Thai government is promoting the Thai orchid by hosting international events and by encouraging Thai orchid exporters to participate in functions such as the Royal Flora Ratchaphuruck in 2006 and 2007, and the Ellerslie International Flower Show in New Zealand[20]. Also the Thai government concentrates on other strategies such as improvement in quality and export, and market competitiveness promotion.[21] Still, the Thai orchid industry and exporters with 40 years of experience in export Thai orchid are need of innovative production so that quality and cost become more efficient. This can benefit SME exporters who have less developed systems in place.

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19 Harmonized System Codes is an international standard of products' number classification.

20 Lekawatana, S. 2010. Thai Orchid: Current Situation. *2010 Taiwan International Orchid Symposium.* International Conference Hall, Taiwan Orchid Plantation, Tainan, Taiwan: Department of Agriculture Extension of Thailand. 5.

21 Ibid.

Other factors concerned with entering the Thai orchid export business, are standard regulations such as tariff barrier and NTB. All of these will be also discussed later in this chapter.

2.2 Supply chain

Thailand has a large production of orchid mostly located in the central region, in particular Bangkok Metropolitan Area[22]. 95% of the total cut orchids production and exports come from Bangkok Metropolitan Area, of which 47% penetrate the international markets[23]. Thai orchid in the market is provided by farmers or local growers who supply flowers through direct sales, wholesalers, retailers or exports.

Thai orchid producers have five distribution channels. Firstly, the direct sale is farmers selling orchids by themselves accounting for 13.3%[24] of orchid products. Secondly, 5.7% of orchid products involve wholesalers. The largest wholesale market in Thailand is Pak-klong Talad in Bangkok which runs daily in the morning hour. The orchid plants also go to the Jatujak Plant Market that opens only on Wednesday. Some farmers open their own stores selling wholesale and retail of both cut orchids and orchid plants. Thirdly, 17.1% of orchid products are operated by middlemen who can resell as wholesalers or retailers. Fourthly, only 1.9% belongs to retailers. A retail market is commonly found in local market stalls nationwide selling cut orchids and orchid plants. They are also major retail stores located in Nakhon Pathom

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[22] Ibid. 3.

[23] Ministry of Commerce. 2009. **Thailand Trading Report** [Online]. Ministry of Commerce. Available: http://www2.ops3.moc.go.th/ [13 June 2013]

[24] ปานแก้ว, ย. (Yupa Pankaew). 2007. **Geomatics for explore and support orchid's production, market and export: Cause study of Central region of Thailand** [Online]. Kasetsart Agricultural and Agro-Industrial Product Improvement Institute. Available: http://www.orchid.kapi.ku.ac.th/index.php?option=com_frontpage&Itemid=1 [23 September 2013]

province such as Air Orchid.[25] Lastly, 62% of orchid producers are also exporters who ship orchids to international market.

For the EU's market, Thai exporters can directly contact importers through wholesale markets or auctions abroad. The figures below show the cycle of flowers after entering the EU market, timeline and prices. The first channel is the agent hired by exporters who are either farmers, exporters or both. There are three kinds of agents - flower processors, sales agents and importing agents. Usually, the agents are from the EU and act as a middleman who has knowledge about markets and demand in the EU, and also provide information to suppliers, which are, in this case, the Thai exporters.

The next stage is the auctions. Wholesalers and retailers are the trade structure and channels for cut orchids. Among the ten flower auctions in Europe, the largest one of its kind is called 'Flore Holland' located in the Netherlands. However, only 10-30% of the total cut orchids imported in the EU are traded through auctions while 70-90% is directly operated by agents or wholesalers.[26] An auction is deemed a good distribution step for a large volume of orchids because the exporters can determine the potential access to the EU and holistic activities within the continent. However, exporters must possess high output capacities and also be able to provide large amount of high-quality orchid.[27]

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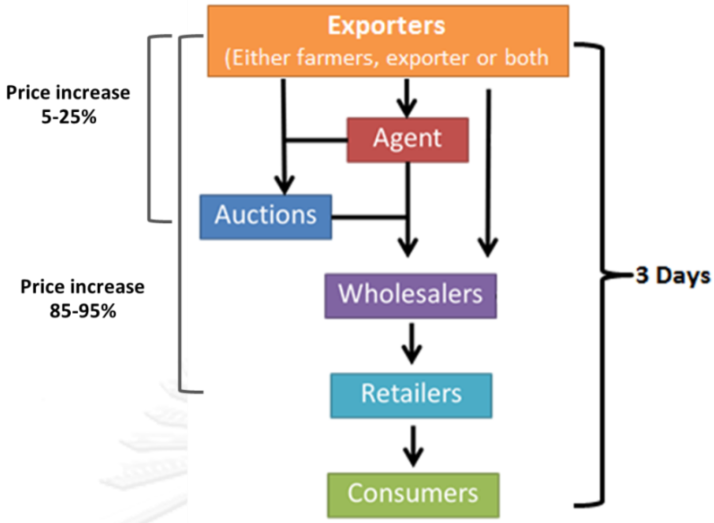
[25] Lekawatana, S. 2010. Thai Orchid: Current Situation. *2010 Taiwan International Orchid Symposium.* International Conference Hall, Taiwan Orchid Plantation, Tainan, Taiwan: Department of Agriculture Extension of Thailand.

[26] ------- 2009a. Cut flowers: The EU market for foliage. ProFound and ProVerde

[27] CBI 2011b. **Trade structure and channels for summer flowers**.

Figure 1: Orchid's price and Export timeline



Source: Author and Trade structure and channels for summer flower, 2011

From the exporter's country to a retailer, the whole process usually takes 3 days. If cut orchids are not shipped within 3 days, they must be stored in air-conditioned warehouses, leading to increased production cost and lower quality, due to the fact that cut orchids are a time perishable product. Furthermore, the price of orchid depends on demand level and the number of distributors. Besides, re-packing, quality checkup, and promotion campaigns can lead to profit between 5-25%[28]. Normally, after orchid reaches a retailer, the price is increased by 85-95%[29] from the original price at auction.

[28] Ibid.

[29] Ibid.

2.3 Exports to the EU

Ranked behind the Netherlands, Thailand is the second largest orchid exporter to the EU[30] with a 28%[31] market share in 2012. Currently, the EU is going through an economic crisis. In spite of this, the EU is still considered to rank in the top three of Thailand's orchid export markets[32]. Orchid demand in the EU has changed and fluctuated over the years. For example, from 2006-2008, the EU raised orchid import by 3.9%, but the figure dropped by 2.7% in 2010[33] because of the economic crisis.

The important buyers of Thai orchids in the EU are Italy, Germany, the Netherlands, France and the United Kingdom since they collectively import more than 50% of the total Thai orchid exports to the EU. Furthermore, more than 50% of each country's total orchid imports come from Thailand. According to information presented in table 2, Italy and The Netherlands are the largest cut orchid importers and main destinations of Thai orchids followed by UK, Germany and France. These countries import orchids from Thailand because they cannot produce enough orchids to meet the demand and the weather is not suitable for orchid production.

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30 NNT. 2007. **Thailand pushes for a 10-billion-baht target in orchid exports in three years** [Online]. Bangkok: National News Bureau of Thailand Public Relations Department. Available: http://thainews.prd.go.th/en/news.php?id=255004080020&tb=NEWS&return=ok [03 May 2012].

31 สำนักงานส่งเสริมการค้าระหว่างประเทศ (Department of International Trade Promotion) 2553. ตลาดไม้ตัดดอกในอิตาลี (**Italy's cut flower market)**.

32 -------. 2007. กล้วยไม้ไทยก้าวไกลในเวทีโลก...การส่งออกปี **2551** จะขยายตัวไม่ต่ำกว่าร้อยละ **10** [Online]. Positioning. Available: http://www.positioningmag.com/prnews/prnews.aspx?id=68935 [01 Fubruary 2012].

33 CBI 2011a. **Promising EU export markets for tropical flowers**. Ministry of Foreign Affairs of the Netherlands.

Table 2: The top five destinationsEU inThai orchids in the EUin 2009

Countries	Value (USD)	Quantity	% of Share
Italy	6,834,424	2,395,415	52.2
Germany	505,802	116,624	3.9
The Netherlands	2,428,701	688,835	18.6
France	159,933	22,553	1.2
The United Kingdom	993,699	234,692	7.6
Total	13,072,756	3,870,770	

Source: United Nations Commodity Trade Statistics Database.

Italy and The Netherlands have greenhouses for growing tropical flowers like orchids. Moreover, the popularity of cut orchids in Germany has shifted to sprouts and young plants that can be grown in residences. Italy is largest importers of Thai orchid because the culture and utility of Italian toward flowers and Thai orchid which can be used in house decoration, fashion accessory and many occasions such as wedding.[34]

2.3.1 Main competitors

Thailand is one of largest orchid producers and exporters in the world with revenues between US$60 and 80 million per year[35]. Its top three clients are the United States, the EU and China, destinations similar to those of Malaysia, Singapore and Vietnam who export the same orchid species. These competitors can substitute Thai orchids if Thai exporters fail to meet demand. In general, Thai orchid exporters have a number of advantages such as strong production capacity and market share.

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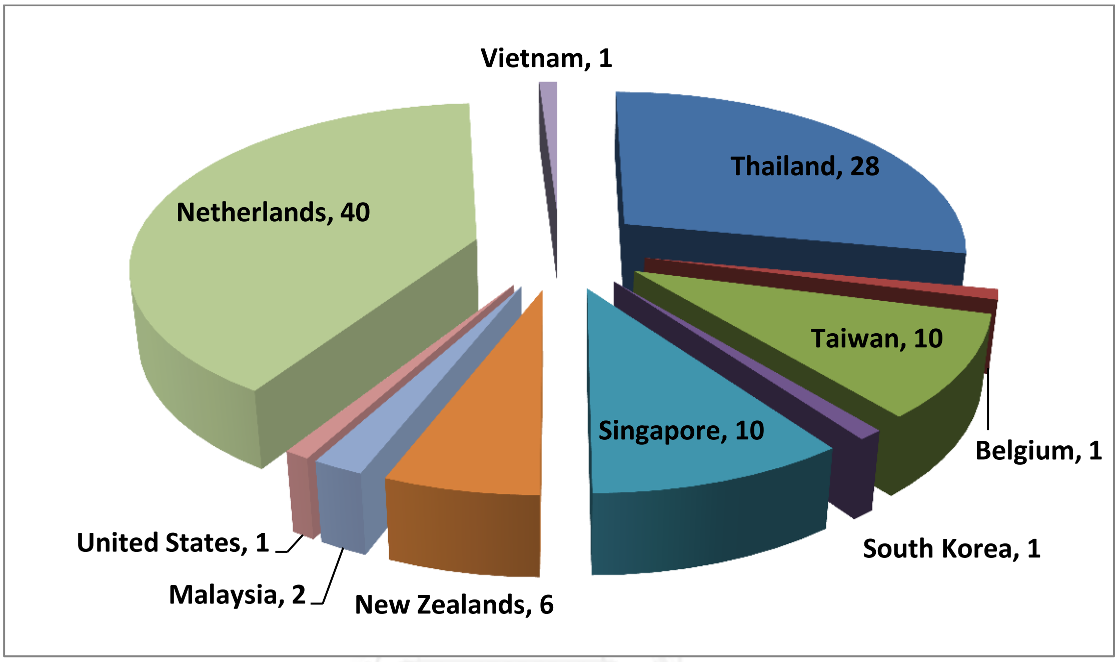
[34] สำนักงานส่งเสริมการค้าระหว่างประเทศ (Department of International Trade Promotion) 2553. ตลาดไม้ตัดดอกในอิตาลี (**Italy's cut flower market)**.

[35] กรมส่งเสริมการส่งออก. (Department of Trade Promotion) 2007. **Statistic of international trade balance** [Online]. กระทรวงพาณิชย์ (Ministry of Commerce). Available: http://www.gtis.com/gta/secure/gateway.cfm

As shown in figure 3, Thailand's 28% market share in 2012 has risen 4% since 2009. More information on Thai orchid exporters' rivals is as follows.

Figure 2: Cut orchid export's market share in the EU 2012



Source: Department of Foreign Trade, Thailand 2013

The figure indicates that Thailand is the leader in orchid export to the EU with US$ 13.1 million in income, accounting for 87.6% of the total exports by the four Southeast Asian countries in the list.

Like Thailand, all rivals need to comply with the EU's regulations, sharing the same markets and some problems in production and export.

Table 3: Thai orchid exporters' competitors in 2009

Countries	Problems	Export value	Government support	Noted
Singapore	- Land limitation - Cost of production	1,360,238	-None	- Import orchid from Thailand and re-export
Malaysia	- Plant health (diseases, insects)	269,336	-Tax deduction - Financial support	
Vietnam	- Plant health, quality - Lack of development	218,007	- None	- Few farmers that choose an orchid over other agricultural products

Source: Author and United Nations Commodity Trade Statistics Database.

First of all, Singapore is the second largest orchid exporter in South East Asia with higher production costs than Thailand because of limitation of space, labor cost. Due to the land limitation issue, Singapore has small orchid farming that grows 20,000-25,000 plants which cannot meet the world demand. Also since Singapore's orchid producers deals with government strict regulations regarding foreign laborers, and lack financial support from the government for building greenhouses which made it difficult to reduce production cost and increase production capacity. However, the Singapore mainly exports three species of orchids which are Dendrobium, Mokara and Aranda and the main destinations of Singapore's orchids are Greece, Hungary and Japan[36]. In 2009, Singapore imported half of its cut orchids

[36] Department of International Trade Promotion of Thailand, 2006. Orchid producers in Singapore. Singapore.

from Thailand with a value of US$ 819,366 before re-exporting with a 60-percent increase in price[37].

Secondly, Malaysia's cut orchids are grown in green houses in a properly-controlled environment. However, Malaysia has the same production problems as Thailand, such as plant diseases and insects[38]. Prioritizing orchids as part the floriculture industry policy, its government offers tax deduction and financial incentives in order to attract investment. The high potential of development in orchid production is based on a growing economy and the increase of domestic per capita, which can upgrade the future quality and production capacity of Malaysia's orchids. In 2000, Malaysia started exporting to the EU to countries such as in Belgium, Finland and Ireland[39] and gained 11% of the market share.

Thirdly, Vietnam has weather similar to Thailand, allowing it to be a suitable location to plant and grow orchids. However, not only does Vietnam have problems concerned with cut orchids' quality such as plant diseases, but the country also suffers the development of production. As an example, in the recent years, the Institute of Agricultural Genetics (AGI) has focused on solving problems by growing flowers in closed areas to avoid diseases. Orchids in Vietnam are grown in greenhouses located in the southern region, but this flower is not popular among local farmers because of the high levels of investment, when compared to other cut flowers such as roses, carnations, and chrysanthemums that can be planted in

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[37] -------. 2009b. **Statistics of cut orchid in 2009** [Online]. United Nations Commodity Trade Statistics Database. Available: http://comtrade.un.org/db/dqBasicQueryResults.aspx?cc=060313&px=HS&r=all&y=2009&p=0&rg=2&so=9999&rpage=dqBasicQuery&qt=n

[38] FAO. 1998. **Cut flower production in Asia** [Online]. Regional Office for Asia and the Pacific. Available: http://www.fao.org/docrep/005/ac452e/ac452e00.htm#Contents

[39] Ibid.

fields[40]. The market for cut orchids in Vietnam is mainly its domestic areas so its export to the EU merely totaled around US$ 200,000. Vietnam obtains a GSP privilege from the EU and has become an up and coming competitor in recent years.

When compared to competitors, the Thai orchid export has production problems regarding plant health and lack of government support in production development. But the value of Thai orchid export is greater than those of its rivals with over US$13 million of income reported in 2009. The success might be related to production capacity, uniqueness and quality of Thai orchids.

Table 4: Cut orchid exports to the EU in 2009 (USD)

Countries	EU		
	Value	Quantity	% share
Thailand	13,072,756	3,870,770	28
Singapore	1,360,238	325,772	10
Malaysia	269,336	188,266	2
Vietnam	218,007	51,785	1

Sources: United Nations Commodity Trade Statistics Database

Other challenges of Thai cut orchid exporters apart from rival countries such as Malaysia, Singapore and Vietnam, timing is important because cut orchids can go bad within a 1-2 weeks' time. Also Thai orchid export business needs large investment and capital flow with slow returns and high risks. For example, a medium-sized company that has 30 employees requires at least 13 million baht in investment for construction and equipment. The company needs at least 500,000

40 Schuiteman, A. 2000. **Orchid genera of Thailand, Laos, Cambodia, and Vietnam**,The Natherlands, National Herbarium of the Netherlands

baht worth of profit within 5 years to reach equilibrium point.[41] In addition to the uncertainty of weather conditions, these are risks that the exporters or investors have to take in investing in orchid exports.

2.3.2 EU regulations on imports of cut orchids

The EU regulations are the requirements set by the EU for import products which can be tariff barriers, NTB or regulation that help trade flow such as support for improving ports or customs facilities, strengthening partners' trade negotiation or helping countries meet specific European health and safety standards those are part of trade facilitation.[42]This research specifically discusses barriers that have a potential impact on cut orchids because the export value of cut orchids is 10 times higher than that of orchid plants. Important regulations for Thai orchid exporters are about the standard quality of the orchid[43] set by the EU has been seen as powerful NTB for Thai orchid exporters. One of the first NTB is the GAP (Good Agricultural Practices) which was established in 2004 and was later known as European Retailers Good Agricultural Practice (EUREPGAP). It requires inspection on cut orchids for all Thai orchids from farming to post-harvest process, including worker's conditions (health and knowledge)[44]. The second NTB is GMP (*Good Manufacturing Practice*), which is pertaining to packaging and materials according to TAS 5502-2009 of the Thai Agricultural Standard stating that *"materials used for orchid boxes shall be new, clean, strong, and durable during transportation. It could*

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41 Institute for Small and Medium Enterprises Development. 2005. **Orchid Export Business (**ธุรกิจกล้วยไม้ส่งออก)*,1st*Pathum Thani, Thammasat Printing House.

42 Europa. 2013a. **Aid for trade** [Online]. European Commission. Available: http://ec.europa.eu/trade/policy/countries-and-regions/development/aid-for-trade/

43 DITP. 2011. **Thai Orchid Situation** [Online]. Bangkok: Department of International Trade Promotion. Available: http://www.thaitrade.com/trade_detail.php?id=87 [27 August 2012].

44 See full requirements and inspection in appendix A

prevent and preserve the quality of orchid flowers in a good condition up until the destination"[45]. Its purpose is to maintain quality and standards of Thai orchids and to provide a good quality product to customers.

According to the table 5, the existing EU trade regulations are focusing on the inspection of Thai orchid production before and when exports occur. First of all, exporters need to obtain certificates to operate flower business in the EU. Secondly, custom inspections are required by the EU Commission and the private sector in the EU such as NGOs, Trade Unions, the Union Fleurs *International Flower Trade Association,* the German Flower Wholesale and Import *Trade* Association (BGI) and the Professional Florists Association (FEUPF), to ensure that orchids meet all standards.

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[45] National Bureau of Agricultural Commodity and Food Standards, Ministry of Agriculture and Cooperatives of Thailand. 2009. **Good Manufacturing Practices for Orchid Packing House** [Online].

Table 5: NTB for exports of cut orchids to the EU

Name of Standard	Inspection for	Requested by
EU's NTB		
1. International Code of Conduct (ICC)	- Welfare of worker (freedom, health, safety, equality and no child labor) - Protection of environment - Use of pesticides and chemicals	- EU's NGO - Labor Union for cut flower industry
2. EUREPGAP	- Acceptable level of pesticide - Well-being of labor force	- EU's retailers
NTB from other organization in the EU		
3. Fair Flowers & Plants (FFP)	- Environmental friendly production - Social responsibility	- Union Fleurs - Trade Union
4. Milieu Programma Sierteelt (MPS)		- BGI
4.1 MPS-ABC	- Use of pesticides - Save energy consumption - Water processing and recycle	
4.2 MPS-FLP	- Social welfare of labor - Protect ecology	
5. Flower Label Promgramme (FLP)	- Human rights in production - Environment protection	- FEUPF
6. Max Havelaar	- Fair trade	- Switzerland
7. Dutch Flower Auction (VBN)	- Quality of orchid - Quality of packaging	- Dutch

Source: EU Commission and Department of International Trade Promotion Ministry of Commerce, Thailand

Many NTBs are presented in table 5, here they are also other NTBs that mostly concerned by Thai orchid exporters and caused significant issue in exporting Thai orchids as shown in table 6. The NTB in table 6 are trade documents and custom inspection regarding SPS which will be inspected before export and at the EU custom (table 6). According to the EU's Regulation 407/2009[46], the EU requires both documents and physical quality of the orchids. The special requirements are entitled the SPS, a system devised to ensure the quality and standard of orchids in respect of safety, disease, and the environment. For example, 'Plant health control', relates to pests and diseases such as bacteria, insects, and fungi[47] which are commonly found and can destroy crops during the harvest. The farmers must immediately treat them in an appropriate without any chemical use in order to comply with consumers' safety. These requirements represent standards that Thai farmers must comply in order to export orchid with the EU.

This process can seriously affect flower's quality because it is a time-consuming operation and it is impossible to speed up this stage. Upon arriving at ports in the EU, an inspection is implemented by customs officers to track information regarding flowers and to judge whether goods accomplish all requirements.

In addition, this is a must have certification for Thai orchid exporters to ensure Sanitary and Phytosanitary. Thai orchid exporters must also register with the Department of Agriculture[48]. Then, exporters are required to submit reports involving every single shipment and present product sample to the Department of Agriculture

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[46] สำนักงานส่งเสริมการค้าระหว่างประเทศ (Department of International Trade Promotion) 2553. ตลาดไม้ตัดดอกในอิตาลี (**Italy's cut flower market)**.

[47] SADC Cut flower and foliage. Hatfield. 8.

[48] กองเกตุ, อ. (Artid Kongkate) 2555. ภาวะตลาดและความรู้ทั่วไปเกี่ยวกับสินค้ากล้วยไม้ในประเทศเยอรมนี (Situation and general information of orchids in Germany). นครแฟรงก์เฟิร์ต.

every 30 day for inspection.[49] The Thai orchid exporters must go through all of the processes in advance because a failed product cannot be exported.

Table 6: EU's import regulation requirements

1.) General Requirements	- Commercial Invoice - Customs Value Declaration - Freight documents - Freight insurance - Packing list - Single Administrative Document (SAD)
2.) Special requirements	2.1) Cut flower of orchids - Sanitary and Phytosanitary regulation (SPS) 1. Plant health control 2. Product from organic protection

Source: Situation and general information of orchids in Germany 2012

49 Ibid.

CHAPTER III

LITERATURE REVIEW

Trade is an important element for domestic and international economy. Efficient trade flow needs instruments such as FTAs and trade facilitation. This literature review explores the international Free Trade Agreements (FTAs), trade facilitation measurements and the impacts of the FTAs.

3.1 Definition of Free Trade Agreements (FTAs)

FTA is a regional trade agreement. According to Article XXIV of GATT 1994, FTA's meaning could be that *"a free-trade area shall be understood to mean a group of two or more customs territories in which the duties and other restrictive regulations of commerce,..., are eliminated on substantially all the trade between the constituent territories in products originating in such territories"*[50] The FTA focuses on tariff barriers and NTB reductions in order to increase trade volume between two parties, it is a trade-supporting tool between two parties who share common agreement and discriminate parties outside agreement .[51]

On the other hand, a trade barrier includes tariff and NTB on import and export such as quotas, import licensing systems, sanitary requirements, prohibitions, etc. According to Landau, these can be new form of protectionism in order to limit imports[52]. Moreover, a country may impose ROOs to help identify types of goods eligible for duty-free shipment within the free trade areas. The ROO (Rules of Origin)

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[50] WTO. 1994. **General Agreement on Tariffs and Trade 1994** [Online]. WTO. Available: https://www.wto.org/english/res_e/booksp_e/analytic_index_e/gatt1994_09_e.htm [15 April 2013]

[51] Krugman, P. 1991. **The Move Toward Free Trade Zones**. Economic Review, 76, 5-26.

[52] Landau, A. 2005. **The international trading system**,London, Routledge. 11-12.

is material sources' qualification to establish the country of origin by applying for determination.[53]

The above paragraph can be related to trade facilitation and trade liberalization. Trade liberalization refers to free trade itself without interruption from tariffs or quotas, while trade facilitation aims to remove obstacles in an attempt to accommodate goods movement across borders through simplified customs procedures[54] such as ROO, and other NTB like SPS and IPRs (Intellectual property rights) or follow the trade facilitation indicators (appendix B). The indicators help identify trade facilitation policies and its requirements which can come in the form of trade document, border control and charges. For example, the information is shared and exchanged for public use.[55]

3.2 GATT and FTAs

An international trade agreement is reached when countries seek to reduce trade barriers by entering into a trade agreement in order to reduce and remove trade barriers[56]. One of important agreements based on the rules set by the WTO (World Trade Organization) is the "GATT" (General Agreement on Tariffs and Trade).For example, Article 24 of GATT states, "… the duties and other regulation … shall not on the whole be higher or more restrictive than general incidence of the

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[53] Ibid.

[54] Glossary Team. **Trade facilitation** [Online]. WTO. Available: http://www.wto.org/english/thewto_e/glossary_e/trade_facilitation_e.htm

[55] OECD. 2013a. **OECE Trade facilitation indicators: Transforming border bottlenecks into global gateways** [Online]. OECD Trade and Agriculture Directorate. Available: http://www.oecd.org/tad/facilitation/indicators.htm

[56] Robert C. Feenstra, A. M. T. 2011. **International trade***, 2nd ed.*New York, Worth Publisher.

duties and regulations…”[57] Under GATT, the other principles are one of the most-favored nation (MFN). In its first article “with respect to customs duties and charges in connection with importation and exportation … any advantage, favor, privilege or immunity granted by any contracting party … shall be accorded immediately and unconditionally …”[58] it refers to a fair trade for both parties.

3.3 Trade facilitation VS. Trade liberalization measures under FTAs

Trade facilitation has a number of definitions depending on the discussion form of organizations and trade agreements. The WTO define trade facilitation as *“simplification of trade procedures, activities, practices and formalities involved in collecting, presenting, communicating and processing data required for the movement of goods in international trade”.*[59] Trade facilitation has become important in negotiations because it helps increase benefits of trade by reduction of trade barriers and increases trade flow. According to the World Trade Organization’s Doha Development Round, trade facilitation can reduce trade cost. For example, if the trade documents are simplified and streamlined it can reduce trade cost by 3%[60] (because of streamlining of border controls: single submission points for all required documentation)[61].

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[57] WTO. 1994. **General Agreement on Tariffs and Trade 1994** [Online]. WTO. Available: https://www.wto.org/english/res_e/booksp_e/analytic_index_e/gatt1994_09_e.htm [15 April 2013]

[58] Ibid.

[59] OECD 2005. **Policy Brief: Trade Facilitation: The Benefits of Simpler, more Transparent Border Procedures**.

[60] OECD. 2013b. **Trade facilitation indicators** [Online]. Organisation for Economic Co-operation and Development. Available: http://www.oecd.org/regreform/facilitation/trade-facilitation-agreement-would-add-billions-to-global-economy-says-oecd.htm

[61] Ibid.

Moreover, trade facilitation appears to be multilateral and non-discriminatory. It can help reduce transaction cost and complexity of international trade. It can also create effective flow of imports and exports by the following measurements: (i) Custom control related to custom laws and regulations, (ii) Technical regulations to ensure that the goods meet standards, (iii) Veterinary inspections of phytosanitary inspections of plants to prevent diseases and protect consumers, and (iv) Other quality control inspections to ensure that the goods meet international and national standards.[62]

As for trade liberalization, the term refers to an early trade reform of international trade focused on creating trade flow to help the growth of goods export as an effect of tariff reduction. In return, trade liberalization is expected to deliver expansion of investment from both domestic and international investors and better channeling of resources.[63] However, over the years, there have been difficulties in moving goods across borders and the new international standards were established by the WTO. In 1980, trade facilitation had been included in the FTA of the South Pacific Regional Trade and Economic Cooperation Agreement[64].Many policy makers realized trade liberalization or tariff reduction was not enough for creating trade flow. As such, they opted to liberalize trade cooperating with trade facilitation to achieve the goal.

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[62] Economic Social Commission for Asia and thePacific 2002. **Trade Facilitation Handbook : for the Greater Mekong Subregion**,New York, United Nations Publications.

[63] Shafaeddin, S. M. 2005. **Trade Liberalization and Economic Reform in Developing Countries: Structural Change or De-Industrialization?** United Nations Conference on Trade and Development, 179.

[64] Shintaro Hamanaka, A. T., and Dorothea Lazaro 2010. **Trade Facilitation Measures Under Free Trade Agreements: Are They Discriminatory Against Non-Members?** Asian Develop Bank, 55.

In the FTA, trade facilitation became part of agreements based on five principles which are transparency, simplification, harmonization, technical assistance and international agreements. For example, in 2008 ASEAN adopted the trade facilitation program[65] in order to address the trade flow of goods and develop a regional integration network. Trade facilitation not only reduces transaction costs and time, it influences production reform on both the public and private sectors. It rather helps stimulate trade flow through custom procedure since the EU-Thailand FTA has been negotiated for tariff reduction and elimination of NTB by custom integration, standard's harmonization and the certification system.[66]

The trade facilitation is more important than trade liberalization because it manages to help create more trade flow, in particular for agricultural products, than trade liberalization does. Apart from reduced transaction costs, trade facilitation boost export growth, competitiveness, investment, and SMEs participation in international trade.[67]

3.4 The EU-Thailand FTA

The EU-Thailand FTA can help resolve GSP issues in terms of reduction of tariff and NTB which can receive benefits from reduction of standard requirements involving quality control and consumers' safety. These are concerns among exporters and the government about the impact of the EU-Thailand FTA. The EU-Thailand FTA initially started as the EU-ASEAN FTA in March 2006 when it was put on hold by

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65 The ASEAN Secretariat 2012. **Trade Facilitation Initiatives Undertaken In ASEAN**.

66 Economic Social Commission for Asia and thePacific 2002. **Trade Facilitation Handbook : for the Greater Mekong Subregion**,New York, United Nations Publications.

67 Ibid.

political issues within ASEAN. Then the EU shifted interest to individual countries rather than regions. The EU had shown an interest in starting to negotiate with three individual countries which were Singapore, Vietnam, and Thailand[68].

At the end of 2009 the members of the EU agreed on continuing the FTA bilateral negotiations with ASEAN members. A year later the committee from the Trade Negotiation Department approved and submitted a draft of the EU-Thailand FTA negotiations to the Parliament of Thailand for consent to pursue the next step of negotiations toward an agreement with the EU[69]. Currently the Thai government is showing the progress from the parliament approved negotiation framework to start first round negotiations in May 2013, and is aiming to conclude the negotiations within 2 years, or by 2015.

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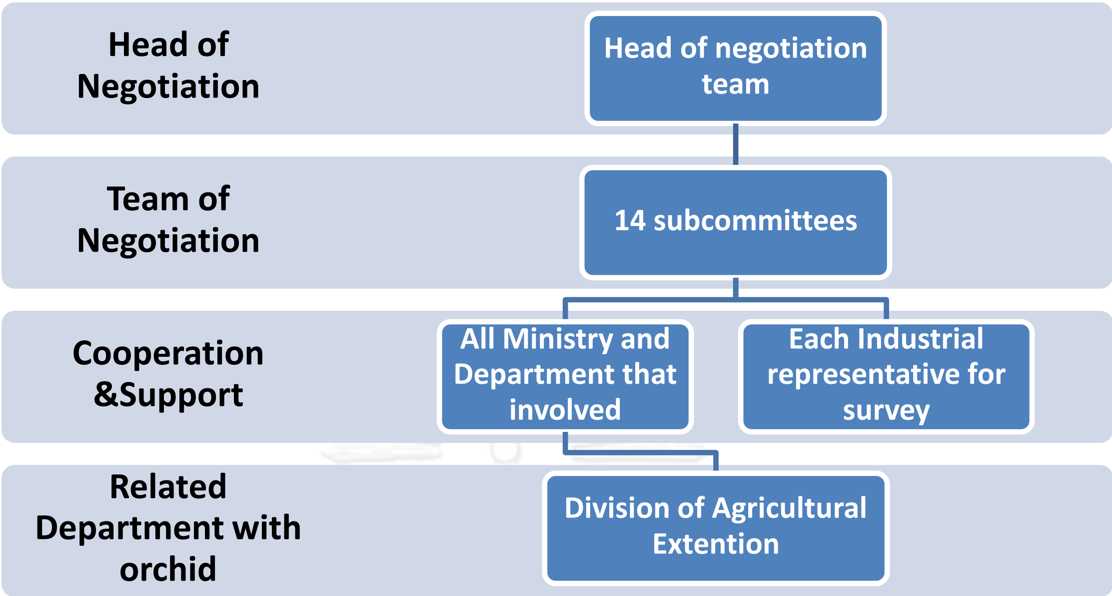
68 กรมการค้าระหว่างประเทศ. (Department of Foreign Trade) 2554. ความตกลงเขตการค้าเสรีระหว่างไทย-สหภาพยุโรป(**Thailand-EU Free Trade Agreement)** [Online]. กรุงเทพฯ: กรมการค้าระหว่างประเทศ. Available: http://www.dtn.go.th/images/stories/file/fta-progress_10.pdf [14 May 2012].

69 Ibid.

Figure 3: EU-Thailand FTA negotiations in Thailand



Source: Author

The first round of the EU-Thailand FTA negotiations was concluded in Brussels during May 27-31, 2013. The Head of Negotiators of the EU-Thailand FTA is representing the Thai government in the first round with teams of negotiators (figure 1) in order to cover all issues and assess the losses and maximum benefits for Thailand. The focus points of Thailand negotiation team feature of 14 issues that had been approved by Parliament of Thailand, also covering products that used to have tariff reduction under GSP.

The negotiations consist of 14 issues which are trade in goods, ROO (Rules of Origin), custom procedures, trade relief policies, technical barriers, Sanitary and Phytosanitary regulation (SPS), trade in services, investments, public procurements, intellectual property rights, competition policies, sustainable development, dispute settlement and transparency in negotiation and management agreement. Each subcommittee covered one issue while cooperating and supporting other subcommittees.

They are 9 out 14 issues discussed in first round of negotiation and out of 9 they are 4 interesting issues that directly involved Thai orchid exporters. These are ROO, customs and trade facilitation, plant health standards and sustainable development.[70] The discussion went deeper on tariff barriers and NTB. The barriers involved Thai orchid exporters in many aspects. First of all, the tariff of Thai orchids is negotiated to reduce the tariff to zero percent[71] as it has been originally set at 8.5% for 2014 after GSP removal. Secondly, the NTB was discussed in an attempt to eliminate barriers. Similarly, the trade facilitation aimed to tackle NTB from the customs regulations such as SPS, ROO and import-related documents.

Formulated by the EU, the SPS is part of plant health standards to control quality and safety. The Thai negotiation team wanted the EU to lower restriction on standards regarding plant diseases and product's safety (chemical use) for agriculture products such as rubber trees, rice and Thai orchids in term of inspection and approval system. This can help Thai orchid exporters to cope with complexity of custom process[72] by reducing EU trade requirements.

Thirdly, according to a statement from the EU and Thai government, the MRA was not mentioned in the Thai orchid negotiation even though the trade facilitation was part of the negotiations. If look at trade facilitation indicators of 'Governance and Impartiality', it is about accountability of goods (appendix B), according to the

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[70] Europa. **Trade policy** [Online]. European Commission.

[71] Penttila, P. 2013. **EU-Thailand Free Trade Agreement: Current developments** [Online]. Delegation of the European Union to Thailand. Available: http://eeas.europa.eu/delegations/thailand/eu_thailand/trade_relation/index_en.htm

[72] Ibid.

European Commission this might be a substitute for MRA on recognition of product's quality and standard.[73]

The current barriers for Thai cut orchid exporters is 8.5% of import tariff after removal of the GSP and the quality control and consumer safety. Looking at table 5 in chapter 2, it clearly shows the required documents and barriers for exporting cut orchids to the EU under the SPS, which is plant health control and product safety. If the exporters have all required documents and tariff duties paid, it can be released immediately, otherwise the goods can be stored at a custom temporary storage under to 20 days.[74]

For the Thai orchid issue, it will consider not only tax rates and trade barriers but also promote the 'Plant Varieties' campaign under article 15(2) of the UPOV[75] convention 1991 "The breeder's right shall not extend to (i) acts done privately and for non-commercial purpose, (ii) acts done for experimental purpose and (iii) acts done for the purpose of breeding other varieties in respect of such other varieties"[76]. UPOV Convention is the present (1991) Act of the International Convention for the Protection of New Varieties of Plants.[77]

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[73] Veggeland, F. 2006. **Trade Facilitation through equivalence and Mutual Recognition: The EU Model**,Oslo, Norwegian Agricultural Economics Research Institute.

[74] Europa. 2013b. **EU import procedures** [Online]. European Commission. Available: http://exporthelp.europa.eu/thdapp/display.htm;jsessionid=157F511A238FE16644AC5CF5C463AB7C?page=rt%2Frt_EUImportProcedures.html&docType=main&languageId=en [18 November 2013]

[75] International Union for the Protection of New Varieties of Plants is an intergovernmental organization located in Geneva focus on protects intellectual property right of plant.

[76] -------. 2011. **International Convention for the Protection of New Varieties of Plants** [Online]. The International Union for the Protection of New Varieties of Plants. Available: http://www.upov.int/en/publications/conventions/1991/w_up910_.htm#_1

[77] Ibid.

3.5 Impact of FTAs on exporting sectors

The impact of the FTA can affect many sectors and each sector will be affected to vary degrees. So, it will be beneficial to review the impact on some sectors and then evaluate the difference in the impact on different sectors. The information in this topic came from several researches that concluded between 2008 to 2012 and relevant with ASEAN-EU FTA and EU-Thailand FTA focuses on both qualitative and quantitative with exporters, government officials and FTA exports.

3.5.1 The Impact of FTA on Automotive and Parts industry

The information came from result based the computable general equilibrium (CGE) model[78] combine the relative comparative advantage (RCA) analysis and tariff rate of Thailand import goods from the EU[79]. The automotive and parts sectors are considered 'the OEM'. The OEM (Original Equipment Manufacturer) is the origin of parts and components that is used on assembly lines which mainly refers to larger sized components[80]. However, Thai automotive and parts producers cannot produce all the parts themselves. Both large businesses and SME need to import products from foreign suppliers. Fortunately, the producers can provide small parts themselves such as accessories for the assembly line.

Moreover, the EU has policies called the ECWVTA (EC Whole Vehicle Type-Approval) and the ELV (end-of-life vehicles) regarding automobile and parts products that will enter the EU. Both policies focus on automobile safety for consumers and preventing them from harming the environment. However, the

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[78] CGE model is a quantitative analysis to determine the potential economic impact of country-country, country-region, and region-region level FTA.

[79] Kenan Institute Asia. 2010. **Thailand SME sectors and the proposed EU-Thailand FTA : Winners, losers and policy recommendation**, Kenan Institute Asia.

[80] Ibid. 56.

ECWVTA certifies the safety of vehicles on the road by requiring certification from the EU agency.[81] On the other hand, the ELV focuses on the safest way to dispose automobile product waste and attempts to eliminate toxins from society.

Despite this, the FTA with the EU may benefit the Thai automotive and parts sector. For example, it will create an investment flow from the EU to Thailand based on the ability of Thailand to attract European investors as Thailand is the automotive hub of the ASEAN countries. If more investors invest in Thailand, the employment rate will naturally increase as a result.

However, drawbacks also exist because Thai producers have to apply and adjust to EU standards[82] like the ELV and ECWVTA. In this case, for safety issues, Thai producers must have EU certification in order to export their products to the EU. These can be time consuming and costly. This is can be very difficult for small to medium producers that have low capital resources revenues available for the development of their products. Also EU investors may encourage manufactures to purchase materials from EU suppliers rather Thai suppliers.

3.5.2 The impact of FTA on Agricultural products

This review of the impact of the FTA on agricultural products is mainly based on a study from the Kenan Institute Asia that uses data obtained from interviews with key persons in the agricultural industry as well as with FTA experts. As a result the impact of the FTA on agricultural products can conclude that it came from four sources. There are tariff reduction, standard regulations such as Sanitary and Phytosanitary Standards (SPS), intellectual property rights (IPRs), and investment

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[81] Hunton, W. 2008. Study on ASEAN-EU FTA Impact on Thailand and Thailand's Strategy. Bangkok: Department of Trade Negotiation. 246.

[82] Kenan Institute Asia. 2010. **Thailand SME sectors and the proposed EU-Thailand FTA : Winners, losers and policy recommendation**, Kenan Institute Asia. 71.

liberalization. This study aims to provide a clearer picture of the key issues related to the FTA such as positive and negative impact on opportunities of Thai SMEs from gathering data through interviews. The following information is relevant to the impact of FTA on agricultural products from several studies.

There are tariff and NTB that block trade flow between two parties. As the FTA implies free trade agreement means no tariff barrier. This is part of the liberalization policy and lower tariffs are better for exports. For increased trade flow, the trade facilitation suggested NTB should be removed and improved by a custom system. Another benefit is reducing damage of product from farmers to consumers. Because the fresh agricultural goods are time perishable and fragile even though they are technology to maintain quality of goods such as cooling transportation[83]. But in 2003 the fresh agriculture products export from developing countries suffer 20 to 50% loss of total export's product because it is time perishable products.[84]

However, the NTB such as SPS and IPRs are still applying and causes slow trade flow[85] which the time perishable product as agricultural products receives significant impact if they are any delay from harvest to consumer. When agricultural products facing tariff and especially NTB, it is the significant issue in export and can be time consuming. This is effects badly on agricultural products because it is time sensitive and perishable product. Even though, the exact measure of impact of NTB on agricultural product difficult to present, they are a case of South Africa's grape export to the EU that sale remains steady after zero tariff and South Africa's oranges

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83 Kader, A. A. 2003. **A perspective on postharvest horticulture (1978-2--3)**. HortScience*,* 38.

84 Ibid.

85 Prachason, S. 2009. **Impact of FTAs on Agriculture: Issues in Food Security and Livelihood**.

and wine has been diverted to alternative market[86], it is implied that EU reduced tariff barrier but used the NTB in slowing down trade flow of agricultural products. For the cut orchid, it has 1-2 week life cycle and very perishable that needs to be handled carefully. In the first 7 days after harvesting, around 10% of total cut orchids were losses.[87] Other losses and damages of cut orchid are happening in vary states from farmer to post-harvest to transportation.[88] This can be the downfall of the agreement if exporters lack the knowledge and preparation needed for it.

All in all, it seems that the main problems of Thai agriculture products encompass tariff and NTB barriers because Thai exporters claimed that "the delay and cost have been added because they are complying with SPS"[89] and 87% of total agricultural products exported to the EU are subject to import tariff and NTB barriers such as the SPS.

According to Kenan's result, it is agreed that NTB in very important in term of consumer protection and safety for the EU such as SPS, however, NTB measures can cause difficulties for SMEs because they do not only have to change the production process, new competitors and also the needs of capital to invest production technology.[90]But after the reduction of tariff and NTB, it should result in

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86 Aida Gonzalez Mellado, Stephan Hubertus Gay, M'Barek, R.andFerrari, a. E. 2010. Evaluation of non-tariff measures for African agricultural exports to the EU in a CGE framework. *13th Annual Conference on Global Economic Analysis.* Penang, Malaysia: Center for Global Trade Analysis of Purdue University.

87 Soon, G. 2006. **Improving Post Harvest Technolgy: Optimizing the orchid production process**. SIF Technologies.

88 Institute for Small and Medium Enterprises Development. 2005. **Orchid Export Business (**ธุรกิจกล้วยไม้ส่งออก)*,1st*Pathum Thani, Thammasat Printing House.

89 Kenan Institute Asia. 2010. **Thailand SME sectors and the proposed EU-Thailand FTA : Winners, losers and policy recommendation**, Kenan Institute Asia.

90 Ibid.

increased import from the EU and help drive productivity and quality standard through competition. The government should provide support in research and development and custom procedures in order to meet EU's standard requirements, especially the SMEs that will have problem adjusting with new competition and standard requirements.[91]

3.6 Research on Thai cut orchids

The following two case studies of Thai orchid the first case supported by the Thai government and the second case supported by the National Orchid Committee. SWOT and Five Forces are the analyzing methods in order to gain better understanding and to provide information about Thai orchid in world's market. However, these two studies do not consider the EU-Thailand FTA and other international agreements.

The case studies focus on analyzing the Thai orchid export industry in order to present a strategy to increase exports, improve quality and stimulate demand. The Thai government's research strategy of Thai orchids was done by conducting a survey of 40 Thai exporters and Thai orchid framers. The questionnaires were analyzed by using conceptual analysis to help conclude into clear topic based on the average score. Each topic was identified as strengths, weaknesses, opportunities and threats of SWOT analysis. Moreover, the Five Forces analysis was used to support information to the SWOT analysis in topic of opportunities and threats which aims to

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91 Ibid.

provide marketing strategy that stimulates sales and price for Thai orchid industry as a whole.

Finally, the result of research presented the 'weaknesses' of Thai orchid as sensitive and time perishable product that lack of storage and ability to storage Thai orchid requests proper transportation from Thai orchid exporters and producers who don't have enough information about transportation or customer's requirements. However, the 'strengths' of Thai orchid in the world's market is a high production capacity based on location and experience in production of Thai orchid industry and support demand of Thai orchid that might increase, which is part of 'opportunities' in on the other hand it means more competitors will enter the market and become 'threats'. They recommended the Thai orchid industry to use strategy to minimize weaknesses and avoid threats called a "maxi-mini" strategy[92] and use strengths and opportunities to help them get around the situation which can help generate more revenue for orchid industry and expects a 19% increase in total sales in the next 5 years[93] and also use those advantages to overcome the problems of new competitors such as Singapore and Vietnam, the lack of development, capital, and support from the government. In addition, the National Orchid Committee suggested improved strategies for both the government and orchid producers, including cooperation between these two sectors.[94]

The case studies also focuses on current effect of EU's regulation on Thai orchid exporters based on a large number of regulations (table 5 and 6) by the EU which seem to aim to thwart Thai export. Thus, discussion of removal the trade

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[92] Ibid.

[93] Ibid.

[94] Ibid.

barriers should be implemented through an FTA. In return, more goods from the EU should be allowed to enter Thailand. The most seriously-affected party will be SME operators since they might have problems in adapt and develop to adhere to the new policy. As such, some businessmen will oppose the FTA unless the Thai government offers an effective solution.

According to a study by the Ministry of Commerce[95], the NTB policies are the most complicated one of its kind, unlike the tariff barrier that has exact rates and is even likely to reduce after the FTA negotiations. The NTB is used to hamper trade flow in order to protect a domestic market. Similarly, the GATT Article 1 states that member countries can use all the necessary measurements to protect the safety and health of humans, animals and plants without discrimination.

Thai orchid exporters have to deal with SPS (Sanitary and Phytosanitary regulation) in the EU without any physical boundary. For example, if a batch of Thai orchid fails to meet the pesticide's safety requirement during a customs inspection, there are good chances that all Thai orchids will be scrutinized even though other exporters have excellent records. The EU's customs might reject Thai orchids until future examinations. Thus, this penalty is critically time consuming and expensive[96].

Moreover, the FTA reduces barriers will help stimulate development as it helps attract more investors. By encouraging greater EU engagement with concurrent knowledge transfers, the FTA can help address the labor productivity issues by improving production technology to increase production per capital and stimulate

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95 Department of Trade Negotiations of Thaialnd. 2004. **Economic and International trade analysis for furture Free Trade nagotiation** [Online]. Available: http://www.thaifta.com/thaifta/Portals/0/file/study_ftacu44.html [09 October 2013]

96 กองเกตุ, อ. (Artid Kongkate) 2555. ภาวะตลาดและความรู้ทั่วไปเกี่ยวกับสินค้ากล้วยไม้ในประเทศเยอรมนี (Situation and general information of orchids in Germany). นครแฟรงก์เฟิร์ต.

growth[97]. This will have a positive impact on the Thai orchid exporters because it needs technology support in production and packaging to make it faster. It is also critical for the efficient production and distribution of goods.

The progress of FTAs in Thailand has triggered concerns that the attendant trade barriers and administrative procedures might increase the cost of doing business. If the country's agreements were mutually consistent, especially concerning ROO, then the costs of a new FTA would be minimal for business. If not, such costs could be notable.

[97] Kenan Institute Asia. 2010. **Thailand SME sectors and the proposed EU-Thailand FTA : Winners, losers and policy recommendation**, Kenan Institute Asia.

CHAPTER IV

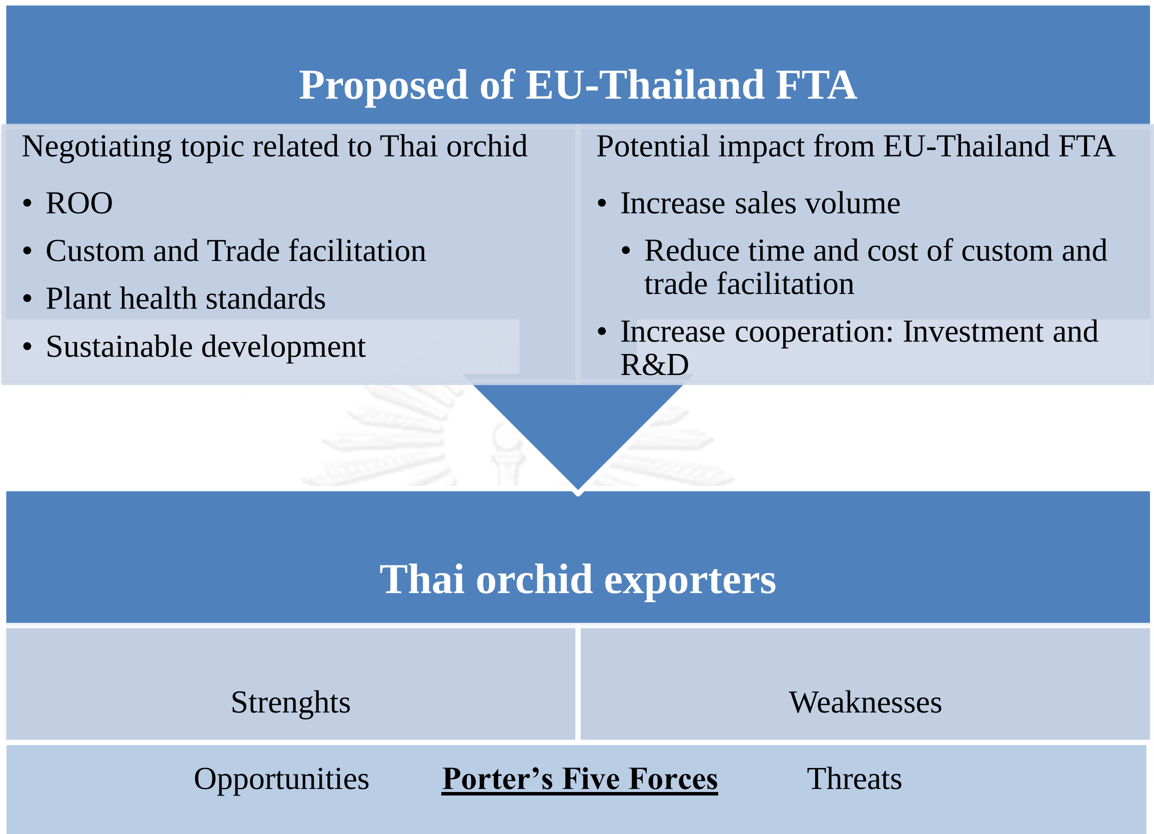
RESEARCH METHODOLOGY

The methodology of this research centers on relevant information from literature on the impacts of the proposed of EU-Thailand FTA toward Thai orchid exporters. Then, the researcher utilized survey for gathering perception on the proposed of EU-Thailand FTA from Thai orchid exporters and in-depth interview with specialists and government officers for their opinion. The date analysis method is presented as well.

4.1 Conceptual Framework

This research examines the impact of the proposed EU-Thailand FTA on Thai orchid exporters from 4 issues in negotiation which are ROO, custom and trade facilitation, plant health standards and sustainable development along with the tariff reduction to elimination. Potentially, the EU-Thailand FTA negotiation might result in reduction of NTB in term of standard requirements such as SPS and reduce in cost of transactions at the custom and delay which can cause the damage to time perishable products like Thai orchid. Also the result of FTA can affect cooperation in development of production technology and research and development in Thai orchid quality and variety of species. Of course, the Thai orchid exporters will gain more market access through the result of EU-Thailand negotiation such as reduction of NTB which can increase sales volume of Thai orchid exporters with better technology in production.

Figure 4: Conceptual Framework of Thai Orchids export to the EU's market



Combining with the perspective of Thai orchid exporters toward the FTA and Thai orchid export industry, all the information will be analyzed through SWOT analysis and Porter's Five Forces. The Thai orchid exporters had been analyzed in SWOT to find Strengths, Weaknesses, Opportunities and Threats of exporting Thai orchid to the EU. Then, Porter's Five Forces used in analyzing Opportunities and Threats of Thai orchid exporters in the in term of existing competitors, potential new competitors, substitute products, bargaining power of suppliers and bargaining power of buyers both domestic and international markets. The result of Porter's Five Forces added to opportunity and threat of SWOT to provide impact from the market as well the EU-Thailand FTA. Following the SWOT and Porter's Five Forces will help this research in concluding impact of the proposed EU-Thailand FTA on Thai orchid exporters.

4.2 Data Collection

4.2.1 Survey

The information came from a survey with Thai Orchid exporters that conducted in December 2013 through various channels (telephone, mail and drop-off), using the multi-stage technique as tool in select representative of Thai orchid exporters from the list of Thai orchid exporters who registered as Thai orchid exporters who export to the EU with the Ministry of Agriculture of Thailand[98]companies on the list located in the Bangkok Metropolitan Area[99] because 80%-90%[100] of Thai orchid exporters are located in Bangkok Metropolitan Area. Representatives of each company were contacted for permission to conduct survey and the representatives should be manager that has responsibility involve with sale, market, logistic or custom service and was able to answer the questionnaire.

The calculation below presents the representative sample size of 123 out of 177 companies, through systematic calculation. Then, they are then required to complete the questionnaire.

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98 สำนักพัฒนาระบบและรับรองมาตรฐานสินค้าพืช. (**Plant Standard and Certification Office)** 2011**b.** รายชื่อผู้ส่งออกกล้วยไม้สู่สหภาพยุโรป (**List of orchid exporters to the EU)** [Online]. doa.go.th. Available: http://www.doa.go.th/psco/index.php?option=com_content&view=article&id=87%3A2010-11-03-03-13-57&catid=37%3A2010-07-27-04-10-43&Itemid=90 [13 June 2011]

99 Bangkok Metropolitan Area is Bangkok and other 5 surrounding provinces which included Nakhon Pathom, Pathum Thani, Nothaburi, Samut Prakan and Samut Sakhon.

100 DITP. 2011. **Thai Orchid Situation** [Online]. Bangkok: Department of International Trade Promotion. Available: http://www.thaitrade.com/trade_detail.php?id=87 [27 August 2012].

The selection of the sample size in this study is based on the Yamane's formula showed below. If there is 5% of the confidence interval and 95% of the confidence level as a result of the calculation below, the required sample size is 123.

$$n = \frac{N}{1 + N(e^2)}$$

Note: n is the sample size

N is the population size

e is the desired level of precision

Thus, the sample size of Thai Orchid exporters in Thailand is shown in table 17.

Table 7: Representative of Thai orchid exporters from each province of Bangkok Metropolitan Area

Provinces	Population size (P)	Calculation	Sample size (S)
Bangkok	105	$S = \frac{P * TS}{TP}$	73
Nakhon Pathom	16		11
Pathum Thani	28		19
Nonthaburi	14		10
Samut Prakan	10		7
Samut Sakhon	4		3
Total population (TP)	**177**	**Total sample size (TS)**	**123**

Source: Calculated by author

According to Yamane's formula, the simple size is 123 in order to select representative from the list of Thai orchid exporters (appendix C), in each province of Bangkok Metropolitan Area with equal chance. First, the researcher classified Thai orchid exporters into six provinces. Then, the proportional representative from each province was selected follow to calculation in table 7. Therefore, the sample size is 123 from the total list of Thai orchid exporters to the EU market.

Secondly, the systematically selection of 123 representative samples of Thai orchid exporters to the EU market were from six provinces in Bangkok Metropolitan Area a sample, as shown in table 8. The representatives of Thai orchid exporters were select two in every three companies as shown in table 8. The representative of each company must fit the criteria which are manager of sales, logistic, market or customer service departments identified by asking respondents who is the manager and has knowledge or involve with export Thai orchids.

Table 8: Selection of Thai orchid exporters

Company	Selected
A	√
B	√
C	Skip
D	√
E	√
F	Skip

Finally, the 123 questionnaires will be sent to respondents through mail, drop-offs and by telephone based on the respondents' convince. If the respondents didn't respond or refused to answer these questionnaires, they were treated as discards. For example, the researcher called respondents and asked them to conduct questionnaires by telephone which was administered by the researcher. If the respondents were not available, the researchers made appointments and use the drop-off method where respondents will be self-administered when answering questions. For respondents who were located far away from Bangkok the researcher sent the questionnaires through the mail. On the questionnaire there were questions that helped identify the respondent's characteristics such as whether it is a small or medium size company which has less than 50 employees and between 51-200 employees respectively.

The survey questionnaire was divided into four parts. Each part contained closed-end questions and focused on specific areas. Part 1 was questioned about the respondent characteristics and company information. Part 2 and 3 both asked questions about Thai orchids and the problems faced in exporting them to the EU and response in Likert scale. The Likert scale is a scaling method for respondents to give their opinion about a statement ranging between strongly agree and strongly disagree. Finally, part 4 asked about respondent's opinions on the FTA and the impact of EU-Thailand FTA's on the Thai orchid export industry.

4.2.2 In-depth interviews

The interviews were conducted from November 2012 to April 2013 with Thai government officers who worked closely with the EU and Thailand's FTA negotiations, international trade, and trade promotions such as with the Department of International Economic Affairs and the Department of Trade Negotiation of Thailand. Also specialists who have researched the impacts of the FTA on agricultural products and were familiar with current EU-Thailand FTA negotiations were interviewed. The interviewees had been selected through snowball sampling technique. This technique the initial respondent refers or recommends another respondent. The sample of this group came from government officers and specialists as shown in table 9

Table 9: List of interviewees

Organization	Sector	Other
Kasetsart University	Faculty of Economics	Specialist
Ministry of Agriculture and Cooperatives	Department of agriculture promotion	Specialist
Ministry of Commerce	Negotiate division	Government officer
Ministry of Foreign Affairs	Department of International Economic Affairs	Government officer
Thai Orchids Co., Ltd.	Logistic Department	Specialist from Large Thai orchid exporter

The people on the list above have been chosen based on their expertise on FTAs or the EU-Thailand FTA, and their knowledge on the EU-Thailand FTA negotiations or FTA's related to agriculture. They could give different perspectives from people that studied about, assessed and worked on the impact of FTA before or in this case the EU-Thailand FTA. Moreover, the opinions of specialists who have already conducted research on the impact of FTA's on agriculture may have insight regarding exporters' reactions and opinions. Also after careful consideration, there were two departments in the Ministry of Foreign Affairs of Thailand that were involved and worked on the EU-Thailand FTA negotiations.

The interview has open-ended questions which gave freedom of expression to interviewees. This set of questions was also divided into four parts much the same as in the questionnaire. The first part was about interviewees' information, such as their position in the organization. The second part was about their opinion on Thai orchid exports. The interviewees' perceptive on the impact of the FTA on Thai orchid exporters was asked in part 3. The impact of the EU-Thailand

FTA can be advantageous or disadvantageous for Thai exporters such as increasing the sales volume or increasing the competition. Finally, questions on the future of Thai orchid exporters and suggestions for the government were placed in part 4.

4.2.3 Secondary data

The theory and information in the literature review came from books, articles, and pervious research relevant to the impact of the EU-Thailand FTA and Thai orchid export. First of all, the researcher analyzed the Thai orchid export market and EU's regulation that related with trade barriers on agriculture products, especially Thai orchid exporting industry. Then, the researcher reviewed information on the EU-Thailand relationship, the content of the FTA negotiations and the potential impact of the FTA on the Thai export industry. After carefully searching for relevant information about the EU-Thailand FTA, it was narrowed down to the impact the FTA have on the agricultural sector of which Thai orchids are part of. The main sources of information for this part came from the internet and libraries. Keywords were used such as FTA's, impact, agriculture, orchids, trade facilitation, SPS and time perishable product.

In addition, information on the EU's trade barriers and the EU-Thailand FTA negotiations that are related to Thai orchid exporters such as the NTB involving SPS, trade facilitation (ROO, and customs regulations) was taken into consideration. Research articles, EU documents, the internet, and books were researched. Also, the information on the ongoing EU-Thailand FTA negotiations came from government websites such as Orchid Net which is in the sector under the Department of Agriculture Extension of Thailand, the Department of International Trade Promotion of Thailand and the Department of Trade Negotiation of Thailand that specifically deals with Thailand's Orchids. It also came from books and research articles.

4.3 Data analysis

4.3.1 SWOT Analysis and Porter's Five Forces

SWOT Analysis is a tool that tries to analyze internal and external factors on the company into four categories (Strengths, Weakness, Opportunities and Threats). The strength and weakness are referred to the internal matter that directly relates to a company or business. But opportunities and threats are the external matter that can relate and impact a company or business. This theory can help traders or exporters to understand more about them in order to improve and develop themselves in the trading market as follow in table 10.

Table 10: SWOT Analysis

	Advantages	Disadvantages
Internal factors	Strengths	Weaknesses
External factors	Opportunities	Threats

Source: Marketing Strategy and Competitive Positioning 2008

SWOT can be used to identify advantage and disadvantages of the Thai orchid export by finding relevant and supported factors that are strengths, weaknesses, opportunities, or threats through literature reviews, survey questionnaire based on following explanation. The categorization of strengths and weaknesses depend on their impacts on company in term of 4Ps (Product, Price, Place and Promotion)[101] as well as personnel, finance and manufacturing capabilities of the respondents (Thai orchid exporters). Also the opportunities and threats will be categorizing through the changes of legislation, technological, sociocultural, marketplace, economical and competitors and their impact to the company.[102]

Porter's Five Forces helps identified competitive intensity of business and attractiveness of a market.[103] The following is a brief explanation of each force.

Figure 5: Porter's Five Forces Analysis

Source: Marketing Strategy and Competitive Positioning 2008

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101 .Don E. Schultz, Stanley I. Tannenbaum, Robert F. Lauterborn 1994. **Integrated marketing communications: The new marketing paradigm** Lincolnwood, Ill., USA, NTC Business Books.

102 Bernroider, E. 2002. **Factors in SWOT Analysis Applied to Micro, Small-to-Medium, and Large Software Enterprises: An Austrian Study**. European Mangement Journal*,* 20**,** 562-573.

103 Hooley, G. J. **Marketing strategy and competitive positioning / Graham J. Hooley, Nigel F. Piercy, Brigitte Nicolaud***,4th ed*, Harlow, England ; New York : FT Prentice Hall, 2008.

First, the 'rivalry among existing competitors' is existing firms and direct competitors of in this case Thai orchid exporters which can create intensity over buying and selling price of the product in the market.[104]

Second, the 'bargaining power of suppliers' is the resource providers which have the ability to increase material price, transportation time and reduce quality. But more competitors in the market can lower the power of supplier.

Third, the 'bargaining power of buyers' is the one who purchase the product. If buyers have a lot of bargaining power, they can force prices down, bargain for higher quality or more services. But the market has few competitors, it can lower the bargaining power of buyers.

Fourth, the 'threat of new entrants' is the new competitors that have potential to enter the Thai orchid export business. If the industry has high entry barriers, then only few competitors will enter.

Fifth, the 'threat of substitute products' is the product that similar and can satisfy the same need as Thai orchid.

The SWOT analysis and Porter's Five Forces are based on the result of part 3 and part 4 of the survey. The research used a 'frequency table' to count the answers. The data had to be transformed into percentages for better understanding. The 'contingency table' was used to cross analyze two variables, for example, in question 2 and question 6 a certain respondent will have provided more than one answer about their export experience.

The result of Porter's Five Forces will be additional of external factors (opportunities and threats) of the SWOT analysis in order to add more information

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[104] Chen, J. C.-H., Chong, P. P.andChen, Y.-S. 2001. **Decision Criteria Consolidation: A Theoretical Foundation of Pareto Principle to Porter's Competitive Forces**. HOCE*,* 11**,** 1-14.

about Thai orchid industry and also determine advantages and disadvantages for Thai orchid exporters. The advantages of Thai orchid exporters come from strengths and opportunities in the SWOT analysis, on the other hand, the weaknesses and threats provide disadvantages to Thai orchid exporters. Then, the advantages of Thai orchid exporters will be used as tool in overcome disadvantages which called as 'maxi-mini Strategy'.[105]The maxi-mini strategy is the strategy that aims to maximize strengths and opportunities such as utilizing resources like production capacity or labor experience to take advantage of the market for its products on the other hand the company aims to minimize weaknesses and threats such as trade barriers and unskilled labors by focusing on maximize strengths and opportunities on hand.[106]It means use strengths and opportunities as an advantage to overcome weaknesses and threats of its company and product.

4.3.2 In-depth interview analysis

The data collection based on four parts of in-depth interview questions and used Categorizing Strategy as analysis method through coding, according to Miller the coding is method widely used in qualitative data analysis by labeling and then examining and comparing between groups (each interviewee).[107] In this way, the researcher concluded the information of each interview which presented in Appendix F. Each answer will be summarized from each question with codes in order to trace back to the data source. For example, if it has I1Q1L2 as its code in one statement, it

[105] คณะกรรมการกล้วยไม้แห่งชาติ (National Orchid Committe). ยุทธศาสตร์การแข่งขันกล้วยไม้ไทยในตลาดโลก พ.ศ. 2554-2559 (Thai Orchid's competitive strategic in the world market 2011-2016). Bangkok: คณะกรรมการกล้วยไม้แห่งชาติ.

[106] Weihrich, H. 1990. **Essentials of management***, 5th ed*New York, McGraw-Hill.

[107] Maxwell, J. A. 2012. **A realist approach for qualitative research***,*London, Sage.

means the information is from interview No.1 (I1), question 1 (Q1) and on the second line (L2).

The results of the In-depth interviews and surveys were analyzed to find Thai orchid exporters' advantages and disadvantages of the impacts of the EU-Thailand FTA by concluding and comparing the Thai orchid exporters' opinions on the EU-Thailand FTA with specialists and government officers' opinions on this issue. Finally, this research will be able to provide SWOT of Thai orchid exporters and advantages and disadvantages of EU-Thailand FTA toward Thai orchid exporters.

CHAPTER V

RESEARCH FINDINGS AND ANALYSIS

In this chapter, the research results have been divided into two parts. First the result of the survey with Thai orchid exporters in the Bangkok Metropolitan Area will be presented. Second, the result of interviews with specialists and government officers will be presented as well.

The survey and in-depth interviews were concluded to identify the advantages and disadvantages of the EU-Thailand FTA based on the perception of Thai orchid exporters, SWOT analysis and Porter's Five Forces in order to determine challenges to Thai orchid exporters in the EU market. Moreover, the literature review was determined by the EU's regulations, the Non-Tariff barriers (NTB), the Thai orchid export industry and obstacles of Thai orchid exporters such as the time frame to prevent perishes of orchids and quality standards.

5.1 Survey of Thai Orchid Exporters

After weeks of surveying 123 Thai orchid exporters which included sending, calling and drop off questionnaires, the researcher collected 96 completed questionnaires (3 completed questionnaires by mail, 23 completed questionnaires by telephone and 70 completed questionnaires by the researcher in person), and the response rate was 78% which according to Richardson it is an acceptable rate[108]. The result of the survey showed that there are no differences between self-administered and administered respondents based on frequency and average in the result. For example, 27% of the self-administered respondents faced a problem with the customs inspection and 27% of the administered respondents also had a problem

[108] Richardson, J. T. E. 2005. **Instruments for obtaining student feedback: a review of the literature**. Assessment & Evaluation in Higher Education, 30, 409.

with the customs inspection. These respondents provided their response without missing value. The following is the concluded result of the research.

5.1.1 Information of companies and respondents

The characteristics of the respondents and company information were given in part 1 of the questionnaire (appendix E). The information below is the summary of the distinctive characteristics of the respondents which had been processed.

- *Position*

35.4% of the respondents were Marketing Managers, 27.1% were Sales Managers, 22.9% were Logistics Mangers and 10.4% were Customer Service managers. Only 4.2% of respondents were owners of the companies and consultants.

- *Responsibilities*

The result showed that 55.2 % of respondents worked selling goods and 18.8% and 15.6% of respondents were working in logistics and customer care respectively. Only 8.3% of respondents were working in quality control.

- *Company's size*

The result showed that 76% of respondents were small size companies that had less than 50 employees. The remaining 23% of respondents were medium size companies that had 51 to 200 employees.

- *Company's role*

The result showed that 46.9% of respondents were involved in distribution and 53.1% of respondents were both distributors and producers.

- *Export destinations and export percentages*

This question asked respondents, all of whom export to the EU to provide their main export destinations. The result showed that 69.8% of respondents mainly exported to the EU followed by 24% of respondents that exported to Asian countries and only 3.1% of respondents exported to America and Australia.

To summarize, most of the respondents were working in small size companies with less than 50 employees. They were mostly both exporters and producers of Thai orchids. All of the respondents exporting Thai orchid to the EU and most of them have the EU as the main market in export Thai orchid.

5.1.2 Problems of cut orchid exporters

The problems of orchid export were given in part 2 and 3 of questionnaire set 1, and respondents could choose more than one answer. The information below summarizes the distinctive problems of the respondents.

Table 11: Problems in Exporting and Production of Thai orchids

Export problems / Production problems	EU's regulations	Damaging	Transportation cost	Total
Orchid's health	44	30	8	82
High cost of production	5	-	-	5
Lack of development	3	2	-	5
Weather	-	-	4	4
Lack of government support	12	5	3	20

The information in table 11 is a combination of two questions that asked about the issues of respondents in produce and export Thai orchid. When export Thai orchid (appendix E), the 51 % of respondents have issues with EU's regulations regarding NTB on standard requirements like SPS and custom inspection, 35.4% of respondents had issue with the quality control during transportation caused by delay and poor packaging. The transportation cost is the least important issue in export Thai orchid for respondents and only 12.5% of respondents concerning about it.

As seen in table 11 and information from appendix E, 44 respondents who had a problem with EU's regulations also have problems with the orchids' health(is refer to insect and plant diseases) and 30 of them had damaged orchids from transportation and poor packaging as well as the delay in transportation and custom procedure will damage Thai orchid. This is in accordance with the EU's standard requirement regulations such as SPS, determining that if exporters' orchids have a disease it is reasonable to be inspected at customs. This showed that Thai orchid exporters were concerned with the EU's regulations which comply with the research objective focusing on tariff and NTB.

5.1.3 SWOT and Five Forces Analysis

The following information based on questions with 5-point Likert scale in part 3 as the method to find the SWOT of Thai orchids exporters to the EU from respondents as shown in table 12 and 13. The scale consisted of five codes which were 'Strongly Agree' (5), 'Agree' (4), 'Neutral' (3), 'Disagree' (2), and 'Strongly Disagree' (1).

Table 12: Internal Factors of Thai orchid exporters

Questions	Mean	Meaning
• Lack of understanding about EU's regulation	4.50	Agree
• High cost of labor	3.27	Agree
• Required high experience labors	3.21	Agree
• Lack of consistent development	3.08	Agree
• Unable to attract investment for technology in production	2.70	Disagree
• Lack of effective packaging and storage	2.59	Disagree
• Low production capacity	2.01	Disagree

The table 12 presents 'strengths' and 'weaknesses' of Thai orchid exporters. The respondents believed that Thai orchid exporters have the capacity to store and produce high volumes of orchids, which can be supported by new investors for technology in production such as greenhouse, so they can be deemed as the 'strengths' of Thai orchid exporters. However, the 'weaknesses' of Thai orchid exporters are a lack of consistent development in term of production technology regarding species and quality of orchids. This can be attributed to the fact that Thai orchid exporters would like to hire experiencing worker in order to reduce the cost of labor in training. The labor force is one of the significant issues because orchid's production requires human labor in every step such as quality control, inspection, packaging (which needs to be done in line with a certain standard) and transportation from storage to port. On top of that, a lack of enough insight in the EU regulations made orchid export more difficult, which consists with the result of table 12.

The table 13refers to 'opportunities' and 'threats' of Thai orchid exporters based on respondents' perspective. It shows that EU regulations regarding NTB (such as document requirements, SPS and custom inspection)can be increase based on the fact that many countries that have FTA with the EU still have issue with NTB (chapter 3) and also the EU regulations are being too complicated. . Also the lack of technological support which Thai orchid exporters are needed to ensure consistency of development, high quality transportation and maintain the efficiency and quality of packaging. The respondents believed that there are the other 'threats' of Thai orchid exporters such as many competitors and the price of orchid is fluctuates which can affect the profit and revenue with the minor threat from the rising transportation cost. Thus, it can be argued that the result is on the same track with the table 12, saying that Thai orchid lack of understanding about EU's regulation.

The 'opportunities' of Thai orchid exporters presenting in table 13 are reduction of tariff and the popularity of Thai orchid in the EU which has been steady over the years, may be because there are no substitute products for Thai orchids in the EU.

Table 13: External Factors of Thai orchid exporters

Questions	Mean	Meaning
• Increase NTB	4.01	Agree
• Complicated EU regulations	3.85	Agree
• Many competitors in the EU market	3.68	Agree
• Lack of technological support from the EU	3.68	Agree
• High cost of transportation	3.32	Agree
• Limited access to the EU market	3.31	Agree
• Price of orchid is fluctuates	3.08	Agree
• European Economic crisis	3.00	Neutral
• EU producers can produce Thai orchid	2.59	Disagree
• Orchid substitute products	2.46	Disagree
• Orchid popularity declines	2.35	Disagree
• Tariff reduction from the EU	2.27	Disagree

In table14, the Five Forces analysis shows that there are both opportunities and threats for Thai orchid exporters in the EU market.

Table 14: Five Forces Analysis of Thai orchid exporters to the EU

Factor	Threat	Opportunity
Current Rivalry among Existing Firms (against Thai orchid exporters)		
• Numerous competitors (**high** or low)	✓	
• One or a few strong competitors (high or **low**)		✓
• Cost of inventory such as a warehouse (high or **low**)		✓
• Increase in production capacity (**high** or low)	✓	
• Similar competitors (high or **low**)		✓
Potential Entrants (Orchid exporters)		
• High capital required (high or **low**)		✓
• No product differentiation (high or **low**)		✓
• EU's protection policies (**high** or low)	✓	
Substitute Products		
• There are few good substitutes (high or **low**)		✓
Bargaining Power of Suppliers (suppliers of Thai orchid exporters)		
• Supplying industry has few companies (high or **low**)		✓
• Supplier's products don't have substitutes (**high** or low)	✓	
• Supplier's products are an important input (**high** or low)	✓	
• Supplier's products are differentiated (high or **low**)		✓
Bargaining Power of Buyers (EU)		
• Buyers won't purchase large volumes (high or **low**)		✓
• Buyers can produce products (high or **low**)		✓
• Quality is important to buyers (**high** or low)	✓	
• Buyers have full information (**high** or low)	✓	

The information in table 14 is based on the Likert scale same as tables 12 and 13, with the response categories 'Strongly Agree' (5), 'Agree' (4), 'Neutral' (3), 'Disagree' (2), and 'Strongly Disagree' (1). Here, it is presented as high and low point scale. If it resulted in high point scale (more than 3) meaning threat and it will be opportunity when resulted in low point scale (less than 3). For example, the 'one or a few strong competitors' is classified as an opportunity for Thai orchid exporters because the response was 2.26 on average (appendix E.4) meaning Thai orchid exporters are in stronger position which might be production capacity or sales volume. Then, the opportunity and threat will be analyzed according to five elements of Five Forces analysis as follow.

First of all, the existing competitors, it is a threat to Thai orchid exporters when there are numerous competitors of Thai orchid exporters and become more threaten if the competitors can increase production capacity. However, there are couple opportunities for Thai orchid exporters, first, the cost of storage Thai orchid is high. Second reason there are only few strong competitors who cannot keep up with the production cost and can provide orchid like Thai orchid exporters.

Secondly, the potential entrants, it is difficult to start orchid export business in the EU because the EU's protection policies or trade barriers are significant obstacle in entering the EU market which requires high initial investment, even though, Thai orchid has a strong product differentiates that is why they are low rate of having new competitors. Thirdly, it is the opportunity for Thai orchid exporters because Thai orchids have no substitute products.

Fourthly, the baring power of suppliers, they are many Thai orchid suppliers which give bargaining power to Thai orchid exporters and opportunity to choose the suppliers that providing best quality of Thai orchid at lowest price. But the suppliers can be threat to Thai orchid exporters as well because they have the only source because of the ROO policy from the EU. Also the suppliers have no substitute product for Thai orchid if there is Thai orchid shortest.

Fifth, the bargaining power of buyers, as long as they are no Thai orchid producers in the EU and demand of Thai orchid is high, it is the opportunities of Thai orchid exporters to export large volume of Thai orchids and gain market share. However, if the buyers have knowledge about the orchid (such as the production process, price and quality) the exporters can lose bargaining power because the buyers can use information to negotiate with Thai orchid exporters.

The information in table 15 based on tables 12-14 as a result it will present complete SWOT analysis of Thai orchid exporters. The information from table 14comparing 'opportunities' and 'threats' from information presented in table 13 and 14 as additional factors that based on Thai orchid exporters' perspective on industry, after comparing only factor that difference from information in table 13 and 14 will be added to table 15. As a result they share similarity and consistency that Thai orchid exporters have been threaten by amount of competitor in the market, EU's protection policies even though, the high initial investment and cost of production (transportation cost) are help block the new competitors.

Table 15: The SWOT of Thai orchid

Strengths	Weaknesses
• High production capacity • Effective packaging and storage • Attract new investors for technology in production	• Lack of understanding of the EU's regulations • High cost of labor • Required high experience labors • Lack of consistent development
Opportunities	**Threats**
• Tariff reduction from the EU • Thai orchid's popularity is increases • No substitute product • The EU cannot produce Thai orchids • Few strong competitors in EU market • Low chance of new competitors • Many suppliers of Thai orchids for Thai orchid exporters • The buyer purchase large volumes	• Increase NTB • Complicated EU regulations • Many competitors such as Singapore, Vietnam and Malaysia • Lack of technological support from the EU • High cost of transportation • Limited access to the EU market • Price of orchid is fluctuates • EU's protection policies • The buyers concerns about orchid's quality

As shown in table 15, the information from table 12, 13 and 14 are consisted and related each other. The contents had been arranged from the most important factors to the least important.

In the 'Strengths', the most important factor for Thai orchid exporters is production capacity, effective packing and storage which significant in meeting the demand and maintain quality of orchids during transportation which can be supported by new investments for technology in production development.

The lack of understanding of the EU’s regulations made it difficult for Thai orchid exporters to prepare products and documents required for exports. This is why it is the most important factor under ‘Weaknesses’. The high cost of labor might cause by requiring high experience labors that have high wage or the cost of training for inexperience both of two reasons impact the cost of production. The least important factor of ‘weaknesses’ is ‘lack of consistent development’ in research and development for production technology in order to provide more species and high quality of Thai orchid and also develop packing to help protect Thai orchid during transportation.

Thai orchid exporters believe that the most important ‘opportunity’ for them is the tariff reduction, the increase popularity of Thai orchid which related to the increase in demand of Thai orchid and no potential substitute products. The fact that only a few competitors have strong position as Thai orchid exporters in term of sales, market share and production capacity, this is another opportunity for Thai orchid exporters in competing in the EU market because only few competitors can provide a niche tropical Thai orchid. There are also other factors that can provide opportunities to the exporters like low chance of new competitor because Thai orchid require large investment and it take long time before receive return on investment. Another factor which is an opportunity for Thai orchid exporters is that there are many suppliers that can provide orchids to Thai orchid exporters which provide bargaining power to the exporters to negotiate price and select high quality orchids to buy who purchase large volume of Thai orchids.

Lastly, the 'threats' of Thai orchid exporters is NTB which is the primary concern regarding packaging, SPS, ROO, and documents required, combining with the protection policies such as consumer's safety and complication of the EU's regulations, it can cause a delay in shipment. They are also other threats as follow many competitors such as Singapore, Vietnam and Malaysia, lack of technological support, and increase of cost of transportation from delay cause by custom inspection, difficulty in access the EU market and the Thai orchid buyers are concern about the quality such as only purchase specific species, color, and size of Thai orchid. Also the price of Thai orchid in the EU market is fluctuated depending on the demand and season.

In conclusion the same factors in table 15 will receive an impact from the proposed of EU-Thailand FTA. As mentioned in chapter 2 they are 4 issues that important to Thai orchid exporters and under negotiation (ROO, custom and trade facilitation, plant health standards and sustainable development), if they are changing from those 4 issues it will impact the following factors in table 14 which are reduced NTB, complicated of EU regulation, technology support and development in production, and EU market access. It seems that the with supports the result of opportunities and strengths in SWOT analysis, the EU-Thailand FTA might resolve threats to Thai orchid exporters and the trade agreement will become the potential benefits for Thai orchid exporters.

5.1.4 Potential impact of the EU-Thailand FTA

This information is based on result of part 4 of the questionnaire presented in appendix E.4 which allowed respondents to choose more than one answer which are about the potential impact of EU-Thailand FTA that significant to Thai orchid exporters. From the result the potential impact of EU-Thailand FTA can be concluded that the 79% respondent believes when the EU's import policies in term of tariff barriers and NTB have been reduced or eliminated, it can influence sales of Thai orchid to increase. Also 64% of respondents believe that support and cooperation between EU and Thailand in research and development on production technology and packaging can help Thai orchid exporters during transportation and reduce damage and offer quality and a variety of orchids to customer consequently Thai orchid exporters will have more bargaining power with EU buyers based on the 69.8% of respondents. This is consisting with opportunities and threats in SWOT analysis that when EU-Thailand FTA can resolve threats of Thai orchid exporters, it will become the potential benefits for Thai orchid exporters as in table 16.

Table 16: Potential impact of the EU-Thailand FTA

Expected results	% of respondents
• Compromise on the EU's import policies	79
• Reduction of NTB	75
• Increase bargaining power with EU customer	69.8
• More cooperation between EU and Thailand in R&D	64
• Increase in sales volume	50

5.1.5 The Suggestions to the Royal Thai Government

Suggestions to the Thai government on the EU-Thailand FTA negotiations have been divided into 5 categories as shown in the table below.

Table 17: Thai orchid exporters' suggestions to the Thai Government on the EU-Thailand FTA

Categories	Respondent	Percentage
• Fairness and Justice for exporters	29	30.2%
• Reduction of the EU's import regulations	22	22.9%
• Government support for exports and development	14	14.6%
• Listen to exporters' opinions and allow exporters' participation in negotiations	8	8.3%
• Missing value	23	24%

According to the table 17, 30.2% of respondents suggested that negotiations should be fair and just toward Thai orchid exporters. Referring to the NTB, it should be negotiated to be beneficial to Thai orchid exporters and help solve problems regarding quality control, product safety and customs inspections. 22.9% of respondents suggested that the negotiations should focus on the EU's import regulations.

As a conclusion from the result of survey shown that the respondents are SME Thai orchid exporters who have EU as a main market that facing with many advantages and disadvantages, the advantages of Thai orchid exporters come from the strengths such as production capacity and the opportunities from tariff reduction and Thai orchid cannot be substituted. However, the disadvantages caused by the weaknesses of Thai orchid exporters in term of lack of education on EU's regulation and inconsistent development in research and development and threats from competitors, high cost of transportation and the complication of EU NTB and EU-Thailand FTA. Fortunately, according to 'maxi-mini strategy' the Thai orchid exporters can use their advantages to overcome disadvantages, for example, Thai orchid exporters have high production capacity that can support the high demand of buyers when compare with competitors or the fact that they are on substitute product for Thai orchid and the EU cannot produce it so Thai orchid exporters who supported by high production capacity and many suppliers might resolve NTB issues with demand of Thai orchid in the EU and EU-Thailand FTA.

Overall the respondents have a positive perception toward the EU-Thailand FTA but they are concerns about EU tariffs barrier and NTB regarding quality and standard requirements such as SPS, also protecting and enhancing their benefits become priority for the respondents to recommend to Thai government.

5.2 In-depth Interview Results

The researcher interviewed five people that have knowledge or expertise on the EU-Thailand FTA. The first three people were experts in the agricultural industry and economy and are referred to as specialist No.1, 2 and No.3. The other two were civil servants from the Department of International Economic Affairs, and Department of Trade negotiations, all of which are referred to as officer No.1 and No.2. Five of them provided answers to the interview questions as seen in the Appendix D. The summary of the interview results based on Appendix F is shown in the following section.

5.2.1 Current Situation and Advantages of Thai Orchid Exporters

According to the specialists, Thai orchids are doing well in the world market. Although there were signs of decreasing sales volumes in the past year, it is only a slight drop. There are also the obstacles the exporters have to overcome, such as the lack of development and extension on production line (develop new species). The EU's import tariffs barrier and NTB (import documents, customs inspections and SPS), are further challenges.

The advantages of Thai orchid exporters according to specialist No.1 Thai orchid farmers have good experience and knowledge about planting orchids. (I1Q5L5) On the next response specialist No.1 and 2 share the same opinion: Thai orchids are unique because of the location (I1Q5L2), and the weather (I2Q5L2) of Thailand is suitable for planting orchids (I1Q5L1). Specialist No.2 also said the advantages of Thai orchid exporters are that their product (or orchids) can stand sunlight, last longer (I2Q5L5) and have a low price. The low price allows Thai orchid exporters to purchase orchids at a low price and sell it to the EU at a low price (I2Q5L4); and 45% of exporters are also distributors. Specialist No.3 said the advantages of Thai orchid exporters are both the weather and location that are suitable for planting orchids and also the uniqueness of Thai orchids that distinguish them from other orchids (I5Q3L1&3). Furthermore Thai orchids have many species that are unique and colorful (I2Q5L1) which provide opportunities and advantages to the Thai orchid exporters who are also distributors.

According to the personal opinion of the government officers, they believe Thai orchids are different, unique and that Thailand is the number one orchid producer. Also government officer No.2 said that the agricultural products of

Thailand in general are of a high quality (I4Q3L2) which attracts consumers. Government officer No.1 feels the advantage of Thai orchids lies within the privilege of policy which is the GSP (I3Q3L1). The GSP helps by reducing import tax to the EU and Thai orchid exporters can gain competitiveness from this privilege. However, government officer No.1 could not provide in depth information about the advantage for Thai orchid exporters since the knowledge is limited to the FTA negotiations and international relations.

5.2.2 Obstacle of exporting Thai orchids to the EU

Both specialists and government officers' views on the exporters' obstacles in exporting Thai orchids to the EU were similar. There are the NTB regarding the quality of the orchids such as SPS (Sanitary and Phytosanitary), ROO (Rules of Origin), and TBT (Technical barriers to trade) (I4Q4L1, I5Q4L2). However, the specialists focused more on the plant health part of the SPS rather than the other regulations because it's directly related to the problems faced by Thai orchid exporters (I2Q6L1). This poses the same problem Thai orchid exporters are faced with when exporting to the EU (table 11). The plant health involves more than diseases and insects; it also includes maintaining quality of orchids during transportation.

However, specialist No.1 is more concerned that the obstacles of Thai orchid exporters will create bad outcomes for Thai orchid farmers. She anticipates that Thai orchid exporters will buy orchids from farmers who can deliver the quality that meet the EU's standard. (I1Q6L1)

5.2.3 Impact of the EU-Thailand FTA on Thai Orchid Exporters and Industry

All interviewees agreed that the EU-Thailand FTA will benefit Thai orchid exporters in many areas such as improve production quality and the standard of orchid exports to international markets (I1Q10L1) with the strong position of Thai orchids (I3Q8L4) in the EU. However, Government officer No.1 stated that in the reality of negotiations, 'You have to lose some to get some' (I3Q7L1). The officer means that orchids are not an important export product of Thailand, like automobiles, and all products should receive equal attention the negotiation. The following information presented opinion of each interviewee toward impact of the EU-Thailand FTA on Thai orchid exporters.

Specialist No.1 thinks the main impact will come from EU's import regulations becoming stricter (I1Q8L1). Because after the FTA all the tariffs will be reduced so the EU needs another measure to stop the trade flow of orchids from Thailand. Specialist No. 3 also supports the idea (I5Q6L1). This is the result of them being strict on the quality and standards of orchids' health and consumer safety. This will have a positive impact in improve and develop Thai orchid production in order to meet EU standards along with the rest of the world. On the other hand, the free trade can attract new investors from the EU to invest in logistics and cut the middleman out. These middlemen are Thai orchid exporters and they may be cut out by other companies turning themselves into both buyers and sellers of Thai orchids.

However, specialist No.2 said the EU-Thailand FTA will be of huge benefit to the Thai orchid industry and its exporters because Thai orchids already have an advantage over competitors (I2Q5L4) such as Taiwan. So, the EU-Thailand FTA will create opportunities and open the EU's market to Thai orchid exporters.

Both government officers believe that Thai orchid exporters will be affected positively by the EU-Thailand FTA. For example, Thai orchid exporters can gain advantages over their competitors. They can maintain trade between their businesses and the EU. The EU-Thailand FTA can make investors confident to invest in Thailand because the Thai government attempted to stimulate more international trade by negotiating the FTA. However, they suggest it can also have a negative effect if the negotiations move slower than that of competitor countries or if the EU begins negotiating FTA's with powerful countries like the USA. Then the EU will not have any resources to make a deal with Thailand.

5.2.4 Suggestions to the Royal Thai Government

The information in table 17 had been grouped into three categories which are cooperation, education and negotiation. Those three categories are the suggestion for Thai government made by interviewees about giving information, preparing and understanding the problems and concerns of Thai orchid exporters on EU-Thailand FTA negotiation.

According to specialist No.1 the Thai government should set up cooperatives or community state enterprises for Thai orchid exporters and Thai orchid producers. Then they can share their experiences and knowledge and help each other. The government should provide funds to set up a group and encourage them to work together in order to improve productivity and share group opinions with the government. Also the government should launch programs like 'Training for Trainer' or 'Tell how to' by using local people as specialists who understand the needs and culture of exporters, to provide knowledge on the EU-Thailand FTA and help exporters and producers improve their ability in exporting and producing Thai orchids. This can be channeled to educate exporters and improve the standard of Thai orchids and its export.

Specialist No.2 has suggestions similar to that of specialist No.1 but the difference is he wants the Thai government to use the existing Thai orchid exporters association in order to combine many productive ideas into one idea and present it to the government. Also the government should use a public database or association to reach exporters and producers. Then the government can provide information and knowledge through these channels so people can understand and realize the benefits of the EU-Thailand FTA. Specialist No.3 has suggested the cooperation between the Thai government and Thai orchid exporters which is similar to specialist No.1 and 2. The cooperation will gain inside problems and issues from Thai orchid exporters and help them find a solution to improve the problem (I5Q9L2). Thereafter the government should promote Thai orchids through trade shows (I5Q10L1) because it can reach both a wider population and can focus on a group that has interesting in Thai orchids.

Table 18: The suggestions to the Royal Thai government

	Specialist No.1	Specialist No.2	Specialist No.3	Gov. officer No.1	Gov. officer No.2
Cooperation	Set up new cooperative or community to direct problems to and to give support (I1Q11L3)	Set up or use an existing association to contact with Thai orchid exporters (I2Q11L1-2)	Thai government should set up a trade show to promote Thai orchid for exporters (I5Q12L1)		
Education	Use local people (Thai orchid exporter) in program 'Training for Trainer' or 'Tell how to' improve production standards, packaging and quality (I1Q12L1)	Use association as a tool in providing information about FTA and connect with Thai orchid exporters (I2Q12L1)	Help Thai orchid exporters develop and rise quality and standard of Thai orchid as preparation for new policies from EU-Thailand FTA (I5Q9Ls)	Use PR through websites and surveys to promote the EU-Thailand FTA and present benefits to exporters (I3Q10L1)	Use government websites and press conferences (I4Q10L1-2)
Negotiation				Negotiations with extreme care on Thai orchid exporters' benefits (I3Q9L11)	Consider public opinion (Thai orchid exporters) and Inform public about EU-Thailand FTA negotiation (I4Q9L2)

As shown in table 17, the government officer No.1, the best way to support Thai orchid exporters is to understand the problem that Thai orchid exporters face and then negotiate the EU-Thailand FTA with extreme care and concern regarding Thai orchid exporters' benefits. However, government officer No.2 believes the government, through the Ministry of Commerce and the Ministry of Agriculture, should provide information about exporting and producing to exporters and producers.

Both government officers said it is the responsibility of the Ministry of Commerce to promote and educate Thai people, including Thai orchid exporters, about the EU-Thailand FTA. They suggested that the Ministry of Commerce use government websites (Department of Trade Negotiation's website *www.dtn.go.th*- or www.thaifta.com) to provide all information about the FTA and Thailand's FTA with all countries, and (www.moc.go.th) press conferences and seminars as a PR tool to promote and educate people. The information that is available is mainly about the background of the FTA and does not contain updated information about the EU-Thailand FTA. It also doesn't provide any links for further information and contact information in order to share your opinion and ask for more information such as how to play a part in the negotiation process.

The result of in-depth interview concluded that the interviewees have positive perspective toward the proposed of EU-Thailand FTA, it will help resolve the issue of trade barriers such as NTB which are the important obstacle in exporting Thai orchid to the EU. However, the benefit of the EU-Thailand FTA will also be distributed to other export industry in Thailand and not exclusive to Thai orchid exporters. Also the Thai government must help educate and prepare Thai orchid exporters for new requirements of trade barriers from the EU.

5.3 Conclusion

There are many similarities between the two sample groups' perspective on the tariffs barrier and NTB such as standard regulation, SPS, and document requirements for exporting Thai orchids to the EU. Those are the main challenges for Thai orchid exporters and the EU-Thailand FTA negotiation. Also the fact that Thai orchid is a time sensitive and perishable goods damage by delay of inspection and transportation process which means the reduction and elimination of tariff barriers and NTB more significant. The sample group also agreed that the EU-Thailand FTA will help increase market access, cooperation, accommodate trade flow of Thai orchids at and increase the sales volume of orchids.

However, there are differences opinion presented in result, the interviews focus on the bigger picture of negotiation that Thai orchid is not only product in EU-Thailand FTA negotiation which means the Thai government has to negotiate for other industries such as fishing and rice. Also specialist perceive EU trade requirements and NTB regarding standard and quality as a positive impact that will influence and help improve and develop Thai orchid production and its product to meet new requirements. Another difference is that the Thai orchid exporters didn't suggest a solution to their problem but left it to the government and perceive EU trade requirement and NTB as a negative impact.

In addition, recommendations and suggestions have been made for Thai government regarding Thai orchid exporters' problems and concerns about EU-Thailand FTA negotiation and the procedure that Thai government can use in helping resolve Thai orchid exporters' problem and prepare them for future changes by cooperating and educating public about FTA. For the survey, the suggestion is all about the benefits of exporters themselves. For example, Thai exporters aim to participate in the EU-Thailand FTA negotiations because they want to protect their benefits. Hence, the suggestions about the 'Fairness and Justice' in every agreement means that the government should concern and protect interests of Thai orchid exporters during the negotiations. Also, the result of the in-depth interviews indicated that both specialists and the government see the importance of protecting benefit of Thai orchid exporters and also they are planning for the long term development of Thai orchid exporters.

The comparison of the survey and in-depth interview's results regarding the impact of the proposed EU-Thailand FTA based on the perspective of Thai orchid exporters, specialists and government officers are discussed and presented in chapter 6.

CHAPTER VI

DISCUSSION AND RECOMMENDATIONS

This chapter summarizes and discusses the perspective of Thai orchid exporters, specialists and government officers regarding the potential impact of EU-Thailand FTA on Thai orchid exporters.

6.1 Discussion

The potential benefits of the proposed EU-Thailand FTA for Thai orchid exporters are possible increase in sales volume and in trade flow. That is because the EU-Thailand FTA aims to reduce trade barriers such as tariff, NTB and custom inspection, and increase market access. This study confirms the result of the study of the Kennan Institute Asia, namely that the demand for Thai orchids has the potential to increase and that Thai orchid exporters can succeed in the EU. However, the proposed EU-Thailand FTA is in process of negotiation and the contents are unclear. So, it is likely on the other hand that the Thai orchid exporters have difficulty in preparing and adjusting to new requirements.

The main research finding from the SWOT and Five Forces analysis is that the strength of Thai orchid exporters is their high production capacity, give that opportunities from tariff reduction, demand and popularity of Thai orchids may increase. The main weaknesses of Thai orchid exporters are a lack of consistent development and a lack of understanding of the EU regulations such as SPS, while threats arise from NTB, competitors and the complication of EU regulations regarding

EU's protection policies and standard requirements. Those findings are consistent with the research results of the National Orchid Committee because they find that the strengths are about the production capacity supported by location and experience of farmers. Moreover, the study by the National Orchid Committee revealed that the weakness is the lack of consistent development, while the opportunity of Thai orchid exporters is from increasing in demand and popularity of Thai orchid and the threats are competitors in the world market and trade regulations. However, the National Orchid Committee has also shown other differences of the weaknesses of Thai orchid exporters that are lack of effective storage facility at production level which may damage the quality of perishable product like Thai orchid, and the exporters dumping the price of Thai orchid to gain market share. This can affect sales and revenue of Thai orchid exporters in the long run because buyers may lose interest after the exporters stop dumping the price.

According to information from above paragraph, the strengths of Thai orchid exporters and opportunities from EU-Thailand FTA can give Thai orchid exporters advantages over competitors based on market access, cooperation (research and development in technology of production) and trade flow by reduce tariff and NTB. The issues of Thai orchid exporters with NTB, custom inspection and time perishable products like Thai orchids, are the main concern. However, with the maxi-mini strategy Thai orchid exporters can maximize the strength in production capacity and opportunity from large volume purchase to minimize weaknesses and threats by focusing on the strengths and opportunities on hand.

For the perception of Thai orchid exporters located in Bangkok Metropolitan Area, Thai government officers and specialists, two differences emerged, first, the

Thai government officers and specialists consider the impact of EU-Thailand FTA as a whole rather than focus on Thai orchid export industry like Thai orchid exporters. Second, the specialists believe the NTB is drive Thai orchid exporters to improve and meet standard requirements not the support from the Thai government. However, the overall the perception toward the EU-Thailand FTA is positive, especially in regard to sales and cooperation.

As the result of this research, they are similarities and differences in the research results between survey, in-depth interview and literature review. It can be concluded that the EU-Thailand FTA can provide benefit to Thai orchids after tariff and NTB reduction in term of increase in sales volume, more investment and cooperation from the exporters, government and the EU. Finally, Thai orchid exporters can use their strengths and opportunities gaining from the EU-Thailand FTA to overcome their weaknesses, threats and potential losses from the EU-Thailand FTA.

6.2 Policy Recommendations

With the proposed EU-Thailand FTA negotiation, Thai orchid exporters and Thai government would consider preparation for all potential requirements through an education, preparation and cooperation suggested by Thai government officers and specialists. The Thai government should promote and educate both Thai people and Thai orchid exporters about the FTA through PR tools such as government websites and press conferences, and increase cooperation through community and association of Thai orchid exporters. They should also prepare them for the forthcoming EU-Thailand FTA and policies about the EU's import regulations such as SPS and ROO. That is why education, preparation and cooperation are important tools to help Thai orchid exporters to understand the EU-Thailand FTA and the changes that can happen, and also prepare businesses in order to adapt in accordance with the FTA.

Those are a couple of suggestions to the Thai government to aid, support and solve the problems of Thai orchid exporters and reduce the impact of the threats of the EU-Thailand FTA.

6.3 Limitations and Suggestions for Future Research

The major limitation of this research is the contents of the proposed of EU-Thailand FTA negotiations which are not available for public. This study should be repeated once the content of the proposed EU-Thailand FTA has become more tangible.

Future studies should be conducted with a larger number of both Thai orchid exporters and producers in order to provide information that is more represent the Thai orchid industry.

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APPENDIX

APPENDIX A

GAP's Requirements and Inspection methods

Items	Requirements	Inspection Methods
1. Orchid farm or farm condition	1.1 Assign separate operation areas e.g. greenhouse, equipment and tool storage, production input storage.	1.1 Visual inspection
	1.2 The area within the farm shall be clean, well ventilated and drained.	1.2 Visual inspection
	1.3 Good plant health management so as not to harbor pest.	1.3 Visual inspection
2. Greenhouse	2.1 Strong structure with height according to different orchid varieties and farm condition.	2.1 Visual inspection
	2.2 Sun shade provided according to different orchid varieties and farm condition.	2.2 Visual inspection
3. Pest control	3.1 Pest surveillance shall be in place starting from growing. If pest is found, it shall be eradicated.	3.1 Review record of pest control
	3.2 If any pesticide is applied:	
	3.2.1 Pesticide shall be registered with the Department of Agriculture and shall not be prohibited pesticide.	3.2.1 Visual inspection of pesticide storage
	3.2.2 Introduction on product's label registered with the Department of Agriculture shall be strictly followed and/or referred to the recommendations of the Department of Agriculture.	3.2.2 Review record
	3.3 Equipment used for spraying shall be in good condition. Spraying method shall be safe.	3.3 Visual inspection

4. Pre-harvest production	4.1 Orchid varieties shall be purposely selected, healthy, uniform, free from pest, and produced from reliable source.	4.1 Review record or source of production seedlings
	4.2 Selection of growing media and method are appropriate to orchid varieties and growing conditions.	4.2 Review record and/or visual inspection
	4.3 Water used shall be suitable quality for growing.	4.3 Visual inspection or laboratory analysis
	4.4 Apply appropriate fertilizer formula, concentration and frequency for growing orchids.	4.4 Review record or visual inspection
	4.5 Equipment and tools used in pre-harvesting shall not effect on orchid and orchid cut flower quality.	4.5 Visual inspection
5. Harvesting and post-harvest practices	5.1 Equipment and materials used in harvesting and transferring must be clean and with quality which does not have impacts on orchid and orchid cut flower quality.	5.1 Visual inspection
	5.2 Worker harvesting orchid cut flower shall perform harvesting, holding, and transferring with care to orchid cut flower.	5.2 Visual inspection
	5.3 Holding area for orchid cut flowers in the greenhouse shall be provided clean containers which	5.3 Visual inspection

	can prevent contamination from pest, soil and refuse as well as shall be with shading and heat prevention.	
	5.4 Grading of orchid cut flowers according to sizes and quality classification and culling orchid cut flowers with pest or sign of pest.	5.4 Visual inspection
	5.5 Holding area for orchid cut flower prior to transferring to packing house shall be provided with table or clean containers in order to prevent contamination from pest, soil and refuse as well as shall be with shading and heat prevention.	5.5 Visual inspection
6. Personal health and training of worker	6.1 Workers who expose to pesticides shall be provided with adequate personal protective equipment.	6.1 Visual inspection
	6.2 Personal hygienic facilities shall be adequately provided.	6.2 Visual inspection
	6.3 Appropriate and sufficient health care shall be provided for workers.	6.3 Visual inspection and Interview
	6.4 Provision of knowledge or training on operating procedures, basic skill of pest detection, and pesticide management on regular	6.4.1 Visual inspection 6.4.2 Review record of data and assess knowledge and

	basis.	understanding of workers
7. Record keeping	7.1 Complete record keeping on:	
	7.1.1 Source of orchid varieties	7.1.1 Review record
	7.1.2 Application of pesticide	7.1.2 Review record
	7.1.3 Name of trading partner	7.1.3 Review record
	7.1.4 Number of orchid cut flowers harvested	7.1.4 Review record
	7.1.5 Date of harvesting	7.1.5 Review record
	7.2 Maintaining the record for at least one year	7.2 Review record

Source: National Bureau of Agricultural Commodity and Food Standards, Ministry of Agriculture and Cooperatives, Thailand

APPENDIX B

OECD has developed the following indicators to assess trade facilitation policies:

Indicators	
Advance Rulings	Prior statements by the administration to requesting traders concerning the classification, origin, valuation method, etc., applied to specific goods at the time of importation; the rules and process applied to such statements.
Appeal Procedures	The possibility and modalities to appeal administrative decisions by border agencies.

Co-operation – External	Co-operation with neighboring and third countries.
Co-operation – Internal	Co-operation between various border agencies of the country; control delegation to customs authorities.
Fees and Charges	Disciplines on the fees and charges imposed on imports and exports.
Formalities – Automation	Electronic exchange of data; automated border procedures; use of risk management.
Formalities – Documents	Simplification of trade documents; harmonization in accordance with international standards; acceptance of copies.
Formalities – Procedures	Streamlining of border controls; single submission points for all required documentation (single windows); post-clearance audits; Authorized economic operators.
Governance and Impartiality	Customs structures and functions; accountability; ethics policy.
Information Availability	Publication of trade information, including on internet; enquiry points.
Involvement of the Trade Community	Consultations with traders.

Source: OECE. OECE Trade Facilitation Indicators: Transforming border bottlenecks into global gateways. OECD Trade Policy Papers

APPENDIX C

1. List of Thai Orchid exporters in Bangkok Metropolitan

- Cross out is unselected companies

ลำดับ	ชื่อ	จังหวัด	โทรศัพท์	โทรสาร
1	บริษัท เอ็กโซติก ฟาร์ม โปรดิวซ์ (ประเทศไทย) จำกัด	กรุงเทพมหานคร	0-3435-1025-6	0-3435-2639
2	บริษัท ไซน์โฟร์ท จำกัด	กรุงเทพมหานคร	0-2203-0394	0-2203-0395
3	บริษัท ไทยเฟรชการ์เด้นท์ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2906-5681-2	0-2906-5683
4	บริษัท พีดีไอ เทรดดิ้ง จำกัด	กรุงเทพมหานคร	0-2906-5681-2	0-2906-5683
5	บริษัท แมงโก้สทีน เอเชีย จำกัด	กรุงเทพมหานคร	0-2885-0228	0-2885-0229
~~6~~	~~นายพุฒิพงษ์ เสน่หา (ชื่อที่ใช้ในการประกอบพาณิชยกิจ สปีดเพรช)~~	~~กรุงเทพมหานคร~~	~~08-1813-6349~~	~~0-2533-3899~~
7	บริษัท เจพี ฟูดส์ จำกัด	กรุงเทพมหานคร	0-2953-8499	0-2954-3559
8	บริษัท พลอินเตอร์โกรเวอร์ จำกัด	กรุงเทพมหานคร	0-2274-3796	0-2274-3363
~~9~~	~~บริษัท 3เอฟ เอ็กโซติก จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2868-0995-6~~	~~0-2868-0998~~
10	บริษัท ไทยเวอลด์ อิมปอร์ต เอ็กซปอร์ต จำกัด	กรุงเทพมหานคร	0-2294-0178	0-2294-2083
11	ห้างหุ้นส่วนจำกัด กุ่ยหยู่	กรุงเทพมหานคร	0-2623-7541-2	0-2225-8544
~~12~~	~~บริษัท ยูนีเวอร์แซลโปรดักส์ (ไทยแลนด์) จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2223-0401~~	~~0-2224-6216~~
13	ห้างหุ้นส่วนจำกัด ซี.เค.เค. ฟู้ด	กรุงเทพมหานคร	0-2294-1083	0-2681-0395
14	ห้างหุ้นส่วนจำกัด เอ็นยูไอ ไทยเทรดดิ้ง (เฟรชโปรดิวส์)	กรุงเทพมหานคร	08-1457-5000,08-1417-6543	0-2675-2899 0-2675-2898
~~15~~	~~บริษัท วี.เอส.เฟร็ชโก้ จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2422-5217-8~~	~~0-2422-5219~~
16	บริษัท วี แอนด์ ไอ ไดเรคชั่น จำกัด	กรุงเทพมหานคร	08-1622-6767	0-2255-4141
17	บริษัท เคอร์เน่อร์ อะโกร เอ็กซปอร์ต เซ็นเตอร์ จำกัด	กรุงเทพมหานคร	02-908-1922-4*26	02-9081925
~~18~~	~~บริษัท ฟาร์ อีส 87 อิมปอร์ต เอ็กซ์ปอร์ต จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2932-0133~~	~~0-2932-0135~~
19	บริษัท เอฟ เอ็น วี จำกัด	กรุงเทพมหานคร	08-6305-5326	0-2908-1925
20	บริษัท นำเฮง อิมปอร์ต เอ็กซ์ปอร์ต จำกัด	กรุงเทพมหานคร	0-2932-0132-3	0-2932-0135
~~21~~	~~บริษัท อินทนนท์ ทรอพิคอล เทรดดิ้ง จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2932-6373~~	~~0-2932-7510~~
22	ห้างหุ้นส่วนจำกัด ลองเทิม เทรดดิ้ง	กรุงเทพมหานคร	0-2533-4866	0-2533-4867
23	ห้างหุ้นส่วนจำกัด ไทยพัฒนาฟู้ดส์	กรุงเทพมหานคร	08-5116-1655	
~~24~~	~~บริษัท เอ็กซิม เอเชีย จำกัด~~	~~กรุงเทพมหานคร~~	~~02-6912363~~	~~02-6916066~~
25	บริษัทโกลบอล อะกรี เทรดดิ้ง จำกัด	กรุงเทพมหานคร	0-2860-4157	0-2860-4156
26	บริษัทนคร อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2439-7600	0-2439-2379
~~27~~	~~บริษัท มิสเตอร์กรีน จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2460-2277~~	~~0-2460-2272~~
28	บริษัท สยามเฟรช เอ็นเตอร์ไพรส์ จำกัด	กรุงเทพมหานคร	0-2718-9882	0-2300-5568
29	บริษัท อาร์ พี เอ็น กรีนโปรดักส์ จำกัด	กรุงเทพมหานคร	08-9142-4387	0-2880-2109
~~30~~	~~บริษัท สากลธุรกิจเลิศรวมมิตร จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2718-5274-80~~	~~0-2319-6464~~
31	ห้างหุ้นส่วนจำกัด กรีน เฟรช เทรดดิ้ง	กรุงเทพมหานคร	0-2448-7617-9	0-2448-7411
32	บริษัท ภัสพงศ์ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2448-7617-9	
~~33~~	~~บริษัท ไอทีซี (ประเทศไทย) จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2634-3311-2~~	~~0-2634-0068~~
34	บริษัท เอฟวีไอ จำกัด	กรุงเทพมหานคร	0-2681-1191	0-2681-0775
35	บริษัท ไทย เฟรซ ฟรุท อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2540-4885	0-2540-4936 0-2737-9916
~~36~~	~~บริษัท ซีแอนด์พี เอเชี่ยน โปรดักส์ กรุ๊ป จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2460-2277~~	~~0-2460-2272~~
37	บริษัท ครัวไทย อินเตอร์ทรานสปอร์ต จำกัด	กรุงเทพมหานคร	0-2566-3532, 08-7049-2999	0-2566-3532
38	บริษัท บลูเอเลเฟ่นท์ กรุงเทพ จำกัด	กรุงเทพมหานคร	0-2996-9401-3	0-2996-9415

39	บริษัท ไทยชิน เวเกตเทเบิล แอนด์ ฟรุต (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2811-2958-9,0-2814-9539	0-2814-9540
40	บริษัท เอส บี ฟรุ๊ต จำกัด	กรุงเทพมหานคร	0-2350-2828	0-2350-3883
41	บริษัท อลิษา อินเตอร์ จำกัด	กรุงเทพมหานคร	0-2832-6923	0-2832-6924
~~42~~	~~บริษัท สำเภาทอง เทรดดิ้ง จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2279-6824~~	~~0-2279-6826~~
43	บริษัท แฟมิลี่ เอ็กซ์ปอร์ต จำกัด	กรุงเทพมหานคร	0-2733-6701, 08-6324-8982	0-2733-6694
44	ห้างหุ้นส่วนจำกัด กรุงเทพการค้าและส่งออก 1993	กรุงเทพมหานคร	0-2433-5859	0-2433-5916
~~45~~	~~บริษัท เบนโก อินเตอร์ ฟู้ด จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2533-4866~~	~~0-2533-4867~~
46	บริษัท โกลบอลเฟรทเอ็กเพรส จำกัด	กรุงเทพมหานคร	0-2623-7541-2	0-2225-8544
47	บริษัท สหเจริญเอ็นเตอร์ไพรซ์ จำกัด	กรุงเทพมหานคร	02-6731021	02-6759413
~~48~~	~~ห้างหุ้นส่วนจำกัด ไทย กรีน ฟู้ดส์~~	~~กรุงเทพมหานคร~~	~~0-2865-4085~~	~~0-2865-3598~~
49	บริษัท เอ็กซ์โอเรียนส์ จำกัด	กรุงเทพมหานคร	0-2631-2810-11	0-2631-2812
50	บริษัท เฟรชโก อินเตอร์เทรด จำกัด	กรุงเทพมหานคร	0-2973-2768-9	0-2973-5648
~~51~~	~~บริษัท แกรนด์ เวิลด์ อินเตอร์เนชั่นแนล จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2751-4111~~	~~0-2751-4114~~
52	บริษัท ไรซิง (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2543-6931	0-2543-6932
53	บริษัท โดล เฟรช โพรดิวส์ (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2686-7676	0-2686-7622
~~54~~	~~บริษัท สกายเท็กซ์ จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2719-5611~~	~~0-2719-5293~~
55	บริษัท สยามฟิวเจอร์ฟาร์ม จำกัด	กรุงเทพมหานคร	0-2314-4747	0-2314-4949
56	ห้างหุ้นส่วนจำกัด เจริญซุปเปอร์เฟรช	กรุงเทพมหานคร	0-89200-2828 0-2578-1573	0-2578-4405
~~57~~	~~บริษัท อินเตอร์เนชั่นแนล ฟรุ๊ท (บีเคเค) จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2993-2191-2~~	~~02-9932193~~
58	บริษัท เค แอล อินเตอร์ฟู้ด จำกัด	กรุงเทพมหานคร	0-2279-4486	0-2279-4487
59	บริษัท ไทย มิลเลี่ยน ฟรุ๊ต จำกัด	กรุงเทพมหานคร	02-3318445	02-3318445
~~60~~	~~บริษัท สุรีน่า ฟู้ด จำกัด~~	~~กรุงเทพมหานคร~~	~~02-4397844-49~~	~~02-8640182~~
61	บริษัท ทิมฟู้ด จำกัด	กรุงเทพมหานคร	0-2691-7886	0-2276-0446
62	บริษัท ทีคิวเอ็ม อินเตอร์ฟูด จำกัด	กรุงเทพมหานคร	0-2963-4466	0-2963-4477
~~63~~	~~บริษัท เอ็กซ์โซไทย จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2963-4466~~	~~0-2963-4477~~
64	บริษัท ที.พี.เฟิร์สท อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2730-3661	0-2730-3791
65	บริษัท ไทยลีการเกษตร จำกัด	กรุงเทพมหานคร	0-2676-0431-5	0-2676-4883
~~66~~	~~ชื่อที่ใช้ในการประกอบพาณิชยกิจ "พงศ์วาณิช"~~	~~กรุงเทพมหานคร~~	~~08-9143-2424~~	~~0-2363-8823~~
67	บริษัท เฟรชฟอร์ไลฟ์ จำกัด	กรุงเทพมหานคร	0-2885-0228	0-2418-7408
68	บริษัท วินณ์ไฮ้ จำกัด	กรุงเทพมหานคร	0-2675-4718	0-2343-8381
~~69~~	~~บริษัท ทรอปิคอล ฟู้ด เอ็กพอร์ต จำกัด~~	~~กรุงเทพมหานคร~~	~~085-6641117~~	~~0-2362-9886~~
70	ห้างหุ้นส่วนจำกัด เอฟ แอนด์ วี อิมปอร์ต เอ็กซ์ปอร์ต	กรุงเทพมหานคร	08-1442-6099	
71	บริษัท อีสต์-เวสต์ ไดเร็ค เซอร์วิสเซส จำกัด	กรุงเทพมหานคร	0-2702-6075	0-2702-6075
~~72~~	~~บริษัท เฟรช เมคเกอร์ จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2674-4903-4~~	~~0-2674-4910~~
73	บริษัท ฐานะมั่งคั่ง จำกัด	กรุงเทพมหานคร	0-2623-7543	0-2225-8544
74	ห้างหุ้นส่วนจำกัด บางกอกมะขามหวาน	กรุงเทพมหานคร	0-2270-1934	0-2279-4487
75	บริษัท เวนเจอร์เทค มาร์เก็ตติ้ง จำกัด	กรุงเทพมหานคร	0-2691-9717	0-2691-9736
76	บริษัท นิวเซ็พ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2447-2503	0-2447-0145
77	บริษัท อาจิเซน (ประเทศไทย) จำกัด	กรุงเทพมหานคร	0-2718-5274-80	0-2319-6464
~~78~~	~~บริษัท ช้างไทย เทรดดิ้ง จำกัด~~	~~กรุงเทพมหานคร~~	-	-
79	บริษัท สยาม จัมโบ้ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2982-7036	0-2982-4812
80	บริษัท โกลเด้น ไลน์ บิสซิเนส จำกัด	กรุงเทพมหานคร	0-2510-0051	0-2510-9412
~~81~~	~~บริษัท บี.ซี.เอ.อาร์ จำกัด~~	~~กรุงเทพมหานคร~~	~~08-9891-4842~~	~~0-2907-4696~~
82	บริษัท ไรซิง (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2543-6931	0-2543-6932
83	บริษัท เยส วี แคน เอ็กซ์ปอร์ต จำกัด	กรุงเทพมหานคร	0-2895-7901	0-2895-7901
~~84~~	~~บริษัท ไทยคอมมอดิตี้ จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2745-6954-7~~	~~0-2745-6579~~
85	ห้างหุ้นส่วนจำกัด ทองเงากรุ๊ป	กรุงเทพมหานคร	0-2791-0623	0-2791-0623

86	บริษัท ซีซั่น เฟรช จำกัด	กรุงเทพมหานคร	0-2221-7470	0-2224-4882
~~87~~	~~บริษัท ที.พี.เฟิร์สท อินเตอร์เนชั่นแนล จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2730-3661~~	~~0-2730-3490~~
88	บริษัท สยาม อินเตอร์ เฟรท ฟรูทส์ จำกัด	กรุงเทพมหานคร	0-2721-647308-6304-2927	0-2721-6474
89	บริษัท บลู ริเวอร์ โปรดักส์ จำกัด	กรุงเทพมหานคร	08-1850-2581	-
~~90~~	~~บริษัท อุตสาหกรรมอาหาร ส.ขอนแก่น จำกัด (มหาชน)~~	~~กรุงเทพมหานคร~~	~~0-2391-1010~~	~~0-2392-3743~~
91	บริษัท โลตัสมาร์เก็ตติ้ง จำกัด	กรุงเทพมหานคร	0-2267-7685	0-2237-6566
92	บริษัท ไพน์ เวลตี้ จำกัด	กรุงเทพมหานคร	08-0452-1643	0-2476-7195
~~93~~	~~บริษัท เค.วี.แอล.เอส. จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2736-9994~~	~~0-2736-9994~~
94	บริษัท ฟูลี่ ลัคกี้ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2674-4903-4	0-2674-4910
95	บริษัท เอทนิค เพนต้า จำกัด	กรุงเทพมหานคร	0-2948-4071	0-2948-4072
~~96~~	~~บริษัท มัลติเฟรช จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2460-2277~~	~~0-2460-2282~~
97	บริษัท พีแอนด์เอฟ เทคโน จำกัด	กรุงเทพมหานคร	0-2942-7021-3	0-2942-7024
98	บริษัท ยูนิแคร์ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2641-3420-5	0-2247-2914
~~99~~	~~บริษัท อดาบี ฟรุตส์ โพรเซสซิ่ง จำกัด~~	~~กรุงเทพมหานคร~~	~~0-2971-4617~~	~~0-2552-6105~~
100	บริษัท แอสโซซิเอทเต็ด ฟูด โพรเซสเซอร์ จำกัด	กรุงเทพมหานคร	02-3813200	02-3819696
101	บริษัท เหว่ย หงษ์ (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	08-9780-9919	0-2914-5485
~~102~~	~~บริษัท เกียรติฟ้า จำกัด~~	~~กรุงเทพมหานคร~~	~~02-7474526-30~~	~~02-7474560~~
103	บริษัท ยูเนี่ยนฟรอสท์ จำกัด	กรุงเทพมหานคร	02-3618950	02-3618949
104	บริษัท บลูเจย์ จำกัด	กรุงเทพมหานคร	02-5143230	02-5143229
~~105~~	~~นางจันทนา ชัยรัตน์ ชื่อที่ใช้ในการประกอบพาณิชยกิจ" จันทนา"~~	~~กรุงเทพมหานคร~~	~~08-0423-4830~~	~~0-0472-7216~~
106	บริษัท เฟรช แอนด์ เซฟ จำกัด	นครปฐม	0-3435-1025-6	0-3435-2639
107	บริษัท สวิฟท์ จำกัด	นครปฐม	0-3435-1025-6	0-3435-2639
~~108~~	~~บริษัท กำแพงแสนคอมเมอร์เชียล จำกัด~~	~~นครปฐม~~	~~0-3435-1556-8~~	~~0-3435-1555~~
109	บริษัท แอล เจ เอช เทรดดิ้ง จำกัด	นครปฐม	0-3439-3725-6	0-3439-3727
110	บริษัท เอ็กเซล ฟรุ๊ตส์ จำกัด	นครปฐม	0-2482-1650-4	0-2482-1655
111	ห้างหุ้นส่วนจำกัด ชัชวาล อิมปอร์ต เอ็กซ์ปอร์ต แอนด์ แพคเกจจิ้ง	นครปฐม	0-3437-8236-7	
112	นายองอาจ รัตนศิริมนตรี (ชื่อที่ใช้ในการประกอบพาณิชยกิจ เอฟ.วี.เค.อิมปอร์ต เอ็กปอร์ต)	นครปฐม	0-3437-8236-7	
113	นางศิริวรรณ พวงสุดรักษ์ (ชื่อที่ใช้ในการประกอบพาณิชยกิจ นางศิริวรรณ พวงสุดรักษ์)	นครปฐม	08-1343-7649	
~~114~~	~~บริษัท เอม ไทย อินเตอร์เทรด (2001) จำกัด~~	~~นครปฐม~~	~~0-2350-2828~~	~~0-2350-3883~~
115	บริษัท เบสท์คอนกรีต จำกัด	นครปฐม	0-2267-7685-6	0-2237-6566
116	บริษัท ดัชเชส ฟลอร่า จำกัด	นครปฐม	0-2482-1650-4	0-2482-1655
~~117~~	~~บริษัท เตยหอมแอนด์ซัน อะกริฟู้ดส์ จำกัด~~	~~นครปฐม~~	~~0-3425-4252~~	~~0-3425-4252~~
118	บริษัท เอ เฟรช เอ็กซ์ปอต์ต จำกัด	นครปฐม	0-2482-1651-4	0-2482-1655
119	บริษัท ไทย อินเตอร์เนชั่นแนล แพคกิ้ง จำกัด	นครปฐม	02-8067539	02-8067539
~~120~~	~~บริษัท ชัด ชล อินเตอร์ ผักสด แพ็คเฮ้าส์ จำกัด~~	~~นครปฐม~~	~~089-6030173~~	~~02-8140713~~
121	บริษัท เอ็นที ฟู้ด อินเตอร์เทรด จำกัด	นครปฐม	034-378227	034-378227
122	บริษัท กู๊ดออลส์ อินเตอร์เนชั่นแนล จำกัด	นนทบุรี	0-2980-0225-6	0-2980-0225
~~123~~	~~บริษัท เจ เอส เวิลด์ไวด์ จำกัด~~	~~นนทบุรี~~	~~0-2574-2391~~	~~0-2574-2391~~
124	บริษัท พิสิทธิชัยอินเตอร์เนชั่นแนล จำกัด	นนทบุรี	0-2985-1725,27	0-2985-1729
125	บริษัท เพรสแมน(ประเทศไทย) จำกัด	นนทบุรี	0-2962-1151	0-2962-1152
~~126~~	~~บริษัท เอส.เอ.บี.เทรดดิ้ง จำกัด~~	~~นนทบุรี~~	~~0-2422-5131~~	~~0-2422-5132~~
127	บริษัท อินเตอร์เนชั่นแนล ฟรูทส์ (กรุงเทพ) จำกัด	นนทบุรี	0-3435-8479	0-3437-5214
128	บริษัท ซีรีส เทรดดิ้ง จำกัด	นนทบุรี	0-2422-5131	0-2422-5132
~~129~~	~~บริษัท เซ็มกรุ๊ป จำกัด~~	~~นนทบุรี~~	~~0-3571-9483~~	~~0-3522-7399~~
130	บริษัท สยาม เอ็กซ์ปอร์ต มาร์ท จำกัด	นนทบุรี	0-3571-9483-6	0-3522-7399

131	บริษัท พริพา ออร์กานิค(ไทยแลนด์) จำกัด	นนทบุรี	08-6985-2152	0-2920-9835
~~132~~	~~บริษัท อกริเฟร็ช จำกัด~~	~~นนทบุรี~~	~~0-2231-2934-43~~	~~0-2231-2948~~
133	ชื่อที่ใช้ในการประกอบพาณิชยกิจ " เดอะ เลมอน ลีฟ "	นนทบุรี	08-9485-4994	-
134	ชื่อที่ใช้ประกอบพาณิชยกิจ"ธัญลักษน์ หิรัณย์พศุตม์"	นนทบุรี	08-9261-2260	-
~~135~~	~~บริษัท โอ เอ็น เอส (ประเทศไทย) จำกัด~~	~~นนทบุรี~~	~~02-9270796~~	~~02-9270796~~
136	บริษัท พีเม็กซ์เวิลด์ไวด์ จำกัด	ปทุมธานี	0-2902-9563-6	0-2902-9732
137	บริษัท เอเซีย เอ็กโซติค คอร์ปอเรชั่น จำกัด	ปทุมธานี	0-2529-3340	0-2529-3696
~~138~~	~~บริษัท บุญมี อินเตอร์เนชั่นแนล จำกัด~~	~~ปทุมธานี~~	~~0-2529-3340~~	~~0-2529-3696~~
139	บริษัท ออลเวย์ เฟรช อินเตอร์เทรด จำกัด	ปทุมธานี	0-2995-1887	0-2531-2126
140	บริษัท ธนาสารท จำกัด	ปทุมธานี	0-2520-5205-6	0-2520-5207
~~141~~	~~บริษัท โพรเกรส เวิลด์ จำกัด~~	~~ปทุมธานี~~	~~0-2986-5281-2~~	~~0-2986-5284~~
142	ห้างหุ้นส่วนจำกัด เอชแอนด์คิว อินเตอร์เนชั่นแนล อิมปอร์ตเอ็กซ์ปอร์ต	ปทุมธานี	0-2530-5567	0-2997-4252
143	บริษัท บางกอกไปรเวท จำกัด	ปทุมธานี	0-2995-6691-2	0-2995-6693
~~144~~	~~บริษัท เฟรช พาร์ทเนอร์ส ฟรุท แอนด์ เวเจทเทเบิลส์ จำกัด~~	~~ปทุมธานี~~	~~0-2995-6691-2~~	~~0-2995-6693~~
145	บริษัท เทียนงา อินเตอร์เนชั่นแนล จำกัด	ปทุมธานี	0-2992-2989	0-2992-2998
146	บริษัท เดอะซัน เทรดดิ้ง แอนด์ ทราเวล จำกัด	ปทุมธานี	0-2153-4694	0-2153-4693
147	ห้างหุ้นส่วนจำกัด มีธี	ปทุมธานี	0-2520-5205	0-2520-5207
148	บริษัท เอ็ม อาร์ อินเตอร์มาร์เก็ทติ้ง จำกัด	ปทุมธานี	08-9204-3130	
149	บริษัท สยาม เอ็กซอติคส์ จำกัด	ปทุมธานี	0-2995-6691-2	0-2995-6693
~~150~~	~~ห้างหุ้นส่วนจำกัด เอ็น.ไอ.ดี.(1)~~	~~ปทุมธานี~~	~~0-2995-6691-2~~	~~0-2995-6693~~
151	บริษัท คลับคลาส (ไทย) จำกัด	ปทุมธานี	0-2908-2349	0-2908-2349
152	นายวีระ ปลายทาง (ชื่อที่ใช้ในการประกอบพาณิชยกิจ คัมเบสท์)	ปทุมธานี	0-2992-2989 0-81172-4008	0-2992-2998
~~153~~	~~บริษัท บางกอกดีไฮเดรทมารีนโปรดัก จำกัด~~	~~ปทุมธานี~~	~~0-2581-7691-6~~	~~0-2581-7698~~
154	บริษัท มัตสึริ อินเตอร์เนชั่นแนล จำกัด	ปทุมธานี	0-2153-4698	0-2153-4697
155	บริษัท ซอฟท์เวย์ จำกัด	ปทุมธานี	0-2986-5281-2	0-2986-5284
~~156~~	~~บริษัท ซันไชน์ อินเตอร์เนชั่นแนล จำกัด~~	~~ปทุมธานี~~	~~02-5337199~~	~~02-5337455~~
157	ชื่อที่ใช้ในการประกอบพาณิชยกิจ " นายส่ง มะอิสูงเนิน "	ปทุมธานี	08-4161-1984	0-2908-8907
158	บริษัท ไทย เฟรช อินเตอร์เนชั่นแนล จำกัด	ปทุมธานี	0-2995-6691-2	0-2995-6693
~~159~~	~~บริษัท สยาม อะโกร เฟรช จำกัด~~	~~ปทุมธานี~~	~~0-2987-5884~~	~~0-2987-5884~~
160	บริษัท วาย เจ ซี เทรดดิ้ง จำกัด	ปทุมธานี	08-1655-9359	0-2995-1356
161	บริษัท เอเอ็มซี เอ็นเตอร์ไพรส์ จำกัด	ปทุมธานี	08-6602-2020	-
~~162~~	~~ห้างหุ้นส่วนจำกัด ทริพเพิล เอ ฟรุ๊ต~~	~~ปทุมธานี~~	~~02-3502828~~	~~02-3503884~~
163	บริษัท ที.ซี เฟรช มาร์เก็ตติ้ง จำกัด	ปทุมธานี	02-9020898-99	02-9020901
164	บริษัท อาร์ พี อาร์ คอนซิลติ้ง แอนด์ เทรดดิ้ง จำกัด	สมุทรปราการ	089-6784385, 02-3250529-30	0-2325-0527
~~165~~	~~บริษัท เบสท์ฟรุ๊ต จำกัด~~	~~สมุทรปราการ~~	~~0-2398-9344-5~~	~~0-2361-3438~~
166	ห้างหุ้นส่วนจำกัด เค.ดับเบิลยู.เอ็กซ์ปอร์ต	สมุทรปราการ	08-5240-8127 0-2749-6272	0-2749-6272
167	บริษัท บุญสวิง เฟรช โพรดิวส์ จำกัด	สมุทรปราการ	0-2174-5147	0-2174-5148
~~168~~	~~บริษัท ไทย อกริ ฟู้ดส์ จำกัด (มหาชน)~~	~~สมุทรปราการ~~	~~0-2315-4171-6~~	~~0-2315-4169~~
169	บริษัท ไตรเทค อิมเพค จำกัด	สมุทรปราการ	08-7453-3772	0-2349-4148
170	บริษัท ควีนสทีน จำกัด	สมุทรปราการ	08-1846-4830	0-2749-7390
~~171~~	~~บริษัท ลิโทน ไบโอเทค จำกัด~~	~~สมุทรปราการ~~	~~0-2743-1172~~	~~0-2743-1175~~
172	บริษัท เฮอริเทรด จำกัด	สมุทรปราการ	0-2758-9209	0-2758-8784
173	บริษัท อาร์ แอนด์ อาร์ เฟรช เอ็กซ์เพรส จำกัด	สมุทรปราการ	02-3250529-30	02-3250527
~~174~~	~~บริษัท ชัชวาล ออร์คิด จำกัด~~	~~สมุทรสาคร~~	~~0-3448-0082~~	~~0-3448-1607~~
175	บริษัท พี ไพรม์ จำกัด	สมุทรสาคร	0-2431-2893	0-2431-0423

176	บริษัท ที จี อกริเทรด จำกัด	สมุทรสาคร	0-2840-5571-2	0-2840-5573
~~177~~	~~บริษัท 3ดี ออร์คิด แอนด์ อีทีซี จำกัด~~	~~สมุทรสาคร~~	~~0-2810-0994-6~~	~~0-2810-0998~~

2. The list of Thai Orchid exporters to the EU market

ลำดับ	ชื่อ	จังหวัด	โทรศัพท์	โทรสาร
1	บริษัท พีเม็กซ์เวิลด์ไวด์ จำกัด	ปทุมธานี	0-2902-9563-6	0-2902-9732
2	บริษัท เฟรช แอนด์ เซฟ จำกัด	นครปฐม	0-3435-1025-6	0-3435-2639
3	บริษัท สวิฟท์ จำกัด	นครปฐม	0-3435-1025-6	0-3435-2639
4	บริษัท เอ็กโซติก ฟาร์ม โปรดิวซ์ (ประเทศไทย) จำกัด	กรุงเทพมหานคร	0-3435-1025-6	0-3435-2639
5	บริษัท ไซน์โฟร์ท จำกัด	กรุงเทพมหานคร	0-2203-0394	0-2203-0395
6	บริษัท อาร์ พี อาร์ คอนซิลติ้ง แอนด์ เทรดดิ้ง จำกัด	สมุทรปราการ	089-6784385, 02-3250529-30	0-2325-0527
7	บริษัท ไทยเฟรชการ์เด้นท์ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2906-5681-2	0-2906-5683
8	บริษัท พีดีไอ เทรดดิ้ง จำกัด	กรุงเทพมหานคร	0-2906-5681-2	0-2906-5683
9	บริษัท กำแพงแสนคอมเมอร์เชียล จำกัด	นครปฐม	0-3435-1556-8	0-3435-1555
10	บริษัท แอล เจ เอช เทรดดิ้ง จำกัด	นครปฐม	0-3439-3725-6	0-3439-3727
11	บริษัท แมงโก้สทีน เอเชีย จำกัด	กรุงเทพมหานคร	0-2885-0228	0-2885-0229
12	นายพุฒิพงษ์ เสน่หา (ชื่อที่ใช้ในการประกอบพาณิชยกิจ สปีดเพรช)	กรุงเทพมหานคร	08-1813-6349	0-2533-3899
13	บริษัท เจพี ฟูดส์ จำกัด	กรุงเทพมหานคร	0-2953-8499	0-2954-3559
14	บริษัท พลอินเตอร์โกรเวอร์ จำกัด	กรุงเทพมหานคร	0-2274-3796	0-2274-3363
15	บริษัท 3เอฟ เอ็กโซติก จำกัด	กรุงเทพมหานคร	0-2868-0995-6	0-2868-0998
16	บริษัท ชัชวาล ออร์คิด จำกัด	สมุทรสาคร	0-3448-0082	0-3448-1607
17	บริษัท ไทยเวอลด์ อิมปอร์ต เอ็กซปอร์ต จำกัด	กรุงเทพมหานคร	0-2294-0178	0-2294-2083
18	ห้างหุ้นส่วนจำกัด กุ่ยหยู่	กรุงเทพมหานคร	0-2623-7541-2	0-2225-8544
19	บริษัท ยูนีเวอร์แซลโปรดักส์ (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2223-0401	0-2224-6216
20	บริษัท พี ไพรม์ จำกัด	สมุทรสาคร	0-2431-2893	0-2431-0423
21	บริษัท ริเวอร์แคว อินเตอร์เนชั่นแนล อุตสาหกรรมอาหาร จำกัด	กาญจนบุรี	0-3465-3424,0-3465-3325	0-3465-3390
22	บริษัท เอ็กเซล ฟรุ๊ตส์ จำกัด	นครปฐม	0-2482-1650-4	0-2482-1655
23	บริษัท ซัคเซส อิมพอร์ต แอนด์ เอ็กพอร์ต จำกัด	ชลบุรี	0-3849-3362-3	0-3849-3367
24	บริษัท ซันมูน อิมพอร์ต แอนด์ เอ็กซ์พอร์ต จำกัด	ชลบุรี	0-3849-3362-3	0-3849-3367
25	บริษัท อุทัยพืชผล อินเตอร์เทรด จำกัด	ชลบุรี	0-3849-3362-3	0-3849-3367
26	ห้างหุ้นส่วนจำกัด ซี.เค.เค. ฟู้ด	กรุงเทพมหานคร	0-2294-1083	0-2681-0395
27	ห้างหุ้นส่วนจำกัด ชัชวาล อิมปอร์ต เอ็กซ์ปอร์ต แอนด์ แพคเกจจิ้ง	นครปฐม	0-3437-8236-7	0-3437-8323,329
28	นายองอาจ รัตนศิรินตรี (ชื่อที่ใช้ในการประกอบพาณิชยกิจ เอฟ.วี.เค.อิมปอร์ต เอ็กปอร์ต)	นครปฐม	0-3437-8236-7	0-3437-8323,329
29	บริษัท กู๊ดออลส์ อินเตอร์เนชั่นแนล จำกัด	นนทบุรี	0-2980-0225-6	0-2980-0225-6
30	บริษัท เจ เอส เวิลด์ไวด์ จำกัด	นนทบุรี	0-2574-2391	0-2574-2391
31	บริษัท พิสิทธิชัยอินเตอร์เนชั่นแนล จำกัด	นนทบุรี	0-2985-1725,27	0-2985-1729
32	ห้างหุ้นส่วนจำกัด เอ็นยูไอ ไทยเทรดดิ้ง (เฟรชโปรดิวส์)	กรุงเทพมหานคร	08-1457-5000,08-1417-6543	0-2675-2899,0-2675-2898
33	บริษัท วี.เอส.เฟร็ชโก้ จำกัด	กรุงเทพมหานคร	0-2422-5217-8	0-2422-5219
34	บริษัท วี แอนด์ ไอ ไดเรคชั่น จำกัด	กรุงเทพมหานคร	08-1622-6767	0-2255-4141
35	บริษัท เอเซีย เอ็กโซติค คอร์ปอเรชั่น จำกัด	ปทุมธานี	0-2529-3340	0-2529-3696

36	บริษัท บุญมี อินเตอร์เนชั่นแนล จำกัด	ปทุมธานี	0-2529-3340	0-2529-3696
37	บริษัท เคอร์เน่อร์ อะโกร เอ็กซปอร์ต เซ็นเตอร์ จำกัด	กรุงเทพมหานคร	02-908-1922-4*26	02-9081925
38	บริษัท ฟาร์ อีส 87 อิมปอร์ต เอ็กซ์ปอร์ต จำกัด	กรุงเทพมหานคร	0-2932-0133	0-2932-0135
39	บริษัท เอฟ เอ็น วี จำกัด	กรุงเทพมหานคร	08-6305-5326	0-2908-1925
40	บริษัท นำเฮง อิมปอร์ต เอ็กซ์ปอร์ต จำกัด	กรุงเทพมหานคร	0-2932-0132-3	0-2932-0135
41	บริษัท เพรสแมน(ประเทศไทย) จำกัด	นนทบุรี	0-2962-1151	0-2962-1152
42	บริษัท เอส.เอ.บี.เทรดดิ้ง จำกัด	นนทบุรี	0-2422-5131	0-2422-5132
43	บริษัท อินทนนท์ ทรอพิคอล เทรดดิ้ง จำกัด	กรุงเทพมหานคร	0-2932-6373	0-2932-7510
44	ห้างหุ้นส่วนจำกัด ลองเทิม เทรดดิ้ง	กรุงเทพมหานคร	0-2533-4866	0-2533-4867
45	ห้างหุ้นส่วนจำกัด ไทยพัฒนาฟู้ดส์	กรุงเทพมหานคร	08-5116-1655	
46	บริษัท เอ็กซิม เอเชีย จำกัด	กรุงเทพมหานคร	02-6912363	02-6916066
47	บริษัทโกลบอล อะกรี เทรดดิ้ง จำกัด	กรุงเทพมหานคร	0-2860-4157	0-2860-4156
48	บริษัทนคร อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2439-7600	0-2439-2379
49	บริษัท มิสเตอร์กรีน จำกัด	กรุงเทพมหานคร	0-2460-2277	0-2460-2272
50	บริษัท สยามเฟรช เอ็นเตอร์ไพรส์ จำกัด	กรุงเทพมหานคร	0-2718-9882	0-2300-5568
51	บริษัท ออลเวย์ เฟรช อินเตอร์เทรด จำกัด	ปทุมธานี	0-2995-1887	0-2531-2126
52	บริษัท ธนาสารท จำกัด	ปทุมธานี	0-2520-5205-6	0-2520-5207
53	บริษัท โพรเกรส เวิลด์ จำกัด	ปทุมธานี	0-2986-5281-2	0-2986-5284
54	บริษัท อาร์ พี เอ็น กรีนโปรดักส์ จำกัด	กรุงเทพมหานคร	08-9142-4387	0-2880-2109
55	ห้างหุ้นส่วนจำกัด เอชแอนด์คิว อินเตอร์เนชั่นแนล อิมปอร์ตเอ็กซ์ปอร์ต	ปทุมธานี	0-2530-5567	0-2997-4252
56	บริษัท สากลธุรกิจเลิศรวมมิตร จำกัด	กรุงเทพมหานคร	0-2718-5274-80	0-2319-6464
57	ห้างหุ้นส่วนจำกัด กรีน เฟรช เทรดดิ้ง	กรุงเทพมหานคร	0-2448-7617-9	0-2448-7411-2
58	บริษัท ภัสพงศ์ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2448-7617-9	0-2448-7411-2
59	บริษัท เมาน์เท่นพลัซ จำกัด	เชียงราย	0-5366-0520	0-5366-0520
60	บริษัท ที จี อกริเทรด จำกัด	สมุทรสาคร	0-2840-5571-2	0-2840-5573
61	บริษัท อินเตอร์เนชั่นแนล ฟรูทส์ (กรุงเทพ) จำกัด	นนทบุรี	0-3435-8479	0-3437-5214
62	บริษัท บางกอกไปรเวท จำกัด	ปทุมธานี	0-2995-6691-2	0-2995-6693
63	บริษัท เฟรช พาร์ทเนอร์ส ฟรุท แอนด์ เวเจทเทเบิลส์ จำกัด	ปทุมธานี	0-2995-6691-2	0-2995-6693
64	บริษัท ไอทีซี (ประเทศไทย) จำกัด	กรุงเทพมหานคร	0-2634-3311-2	0-2634-0068
65	บริษัท เอฟวีไอ จำกัด	กรุงเทพมหานคร	0-2681-1191	0-2681-0775
66	บริษัท ไทย เฟรซ ฟรุท อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2540-4885	0-2540-4936,0-2737-9916
67	บริษัท ซีแอนด์พี เอเชี่ยน โปรดักส์ กรุ๊ป จำกัด	กรุงเทพมหานคร	0-2460-2277	0-2460-2272
68	บริษัท ครัวไทย อินเตอร์ทรานสปอร์ต จำกัด	กรุงเทพมหานคร	0-2566-3532,08-7049-2999	0-2566-3532
69	บริษัท เบสท์ฟรุ๊ต จำกัด	สมุทรปราการ	0-2398-9344-5	0-2361-3438
70	บริษัท บลูเอเลเฟนท์ กรุงเทพ จำกัด	กรุงเทพมหานคร	0-2996-9401-3	0-2996-9415
71	ห้างหุ้นส่วนจำกัด เค.ดับเบิลยู.เอ็กซ์ปอร์ต	สมุทรปราการ	08-5240-8127,0-2749-6272	0-2749-6272
72	บริษัท เทียนงา อินเตอร์เนชั่นแนล จำกัด	ปทุมธานี	0-2992-2989	0-2992-2998
73	บริษัท ไทยชิน เวเกตเทเบิล แอนด์ ฟรุต (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2811-2958-9,0-2814-9539	0-2814-9540
74	บริษัท เดอะซัน เทรดดิ้ง แอนด์ ทราเวล จำกัด	ปทุมธานี	0-2153-4694	0-2153-4693
75	บริษัท เอส บี ฟรุ๊ต จำกัด	กรุงเทพมหานคร	0-2350-2828	0-2350-3883

76	ห้างหุ้นส่วนจำกัด มีธี	ปทุมธานี	0-2520-5205	0-2520-5207
77	บริษัท อลิษา อินเตอร์ จำกัด	กรุงเทพมหานคร	0-2832-6923	0-2832-6924
78	นางศิริวรรณ พวงสุดรักษ์ (ชื่อที่ใช้ในการประกอบ พาณิชยกิจ นางศิริวรรณ พวงสุดรักษ์)	นครปฐม	08-1343-7649	
79	บริษัท สำเภาทอง เทรดดิ้ง จำกัด	กรุงเทพมหานคร	0-2279-6824	0-2279-6826
80	บริษัท แฟมิลี่ เอ็กซ์ปอร์ต จำกัด	กรุงเทพมหานคร	0-2733-6701,08-6324-8982	0-2733-6694
81	ห้างหุ้นส่วนจำกัด กรุงเทพการค้าและส่งออก 1993	กรุงเทพมหานคร	0-2433-5859	0-2433-5916
82	บริษัท ซีรีส เทรดดิ้ง จำกัด	นนทบุรี	0-2422-5131	0-2422-5132
83	บริษัท เบนโก อินเตอร์ ฟู้ด จำกัด	กรุงเทพมหานคร	0-2533-4866	0-2533-4867
84	บริษัท เอ็ม อาร์ อินเตอร์มาร์เค็ทติ้ง จำกัด	ปทุมธานี	08-9204-3130	
85	ห้างหุ้นส่วนจำกัด พงศ์เจริญเทรดดิ้งหาดใหญ่	สงขลา	0-7423-5677-9	0-7423-1590,0-7434-9168
86	บริษัท โกลบอลเฟรทเอ็กเพรส จำกัด	กรุงเทพมหานคร	0-2623-7541-2	0-2225-8544
87	บริษัท สหเจริญเอ็นเตอร์ไพรซ์ จำกัด	กรุงเทพมหานคร	02-6731021	02-6759413
88	ห้างหุ้นส่วนจำกัด ไทย กรีน ฟู้ดส์	กรุงเทพมหานคร	0-2865-4085	0-2865-3598
89	บริษัท เซ็มกรุ๊ป จำกัด	นนทบุรี	0-3571-9483	0-3522-7399
90	บริษัท สยาม เอ็กซ์ปอร์ต มาร์ท จำกัด	นนทบุรี	0-3571-9483-6	0-3522-7399
91	บริษัท เอม ไทย อินเตอร์เทรด (2001) จำกัด	นครปฐม	0-2350-2828	0-2350-3883
92	บริษัท เอ็กซ์โอเรียนส์ จำกัด	กรุงเทพมหานคร	0-2631-2810-11	0-2631-2812
93	บริษัท บุญสวิง เฟรช โพรดิวส์ จำกัด	สมุทรปราการ	0-2174-5147	0-2174-5148
94	บริษัท เฟรชโก อินเตอร์เทรด จำกัด	กรุงเทพมหานคร	0-2973-2768-9	0-2973-5648
95	บริษัท สยาม เอ็กซอติคส์ จำกัด	ปทุมธานี	0-2995-6691-2	0-2995-6693
96	ห้างหุ้นส่วนจำกัด เอ็น.ไอ.ดี.(1)	ปทุมธานี	0-2995-6691-2	0-2995-6693
97	บริษัท คลับคลาส (ไทย) จำกัด	ปทุมธานี	0-2908-2349	0-2908-2349
98	บริษัท 3ดี ออร์คิด แอนด์ อีทีซี จำกัด	สมุทรสาคร	0-2810-0994-6	0-2810-0998
99	บริษัท แกรนด์ เวิลด์ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2751-4111	0-2751-4114
100	บริษัท ซันนี่เดย์ อินเตอร์เนชั่นแนล จำกัด	เพชรบูรณ์	0-2732-1613	0-2732-1612
101	บริษัท ไรซิง (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2543-6931	0-2543-6932
102	บริษัท โอเค อินเตอร์เฟรช (ประเทศไทย) จำกัด	เชียงใหม่	0-2350-2828-17	0-2350-3883-4
103	บริษัท โดล เฟรช โพรดิวส์ (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2686-7676	0-2686-7622
104	บริษัท สกายเท็กซ์ จำกัด	กรุงเทพมหานคร	0-2719-5611	0-2719-5293
105	บริษัท สยามฟิวเจอร์ฟาร์ม จำกัด	กรุงเทพมหานคร	0-2314-4747	0-2314-4949
106	ห้างหุ้นส่วนจำกัด เจริญซุปเปอร์เฟรช	กรุงเทพมหานคร	0-89200-2828 0-2578-1573	0-2578-4405
107	นายวีระ ปลายทาง (ชื่อที่ใช้ในการประกอบพาณิชยกิจ คัมเบสท์)	ปทุมธานี	0-2992-2989 0-81172-4008	0-2992-2998
108	บริษัท บางกอกดีไฮเดรทมารีนโปรดัก จำกัด	ปทุมธานี	0-2581-7691-6	0-2581-7698-9
109	บริษัท อินเตอร์เนชั่นแนล ฟรุ๊ท (บีเคเค) จำกัด	กรุงเทพมหานคร	0-2993-2191-2	02-9932193
110	บริษัท เอส.เอ.พี.สยามฟู้ด อินเตอร์เนชั่นแนล จำกัด	พระนครศรีอยุธยา	081-4969671	02-7379916
111	บริษัท เค แอล อินเตอร์ฟู้ด จำกัด	กรุงเทพมหานคร	0-2279-4486	0-2279-4487
112	บริษัท ไทย อกริ ฟู้ดส์ จำกัด (มหาชน)	สมุทรปราการ	0-2315-4171-6	0-2315-4169-88
113	บริษัท เบสท์คอนกรีต จำกัด	นครปฐม	0-2267-7685-6	0-2237-6566
114	บริษัท มัตสึริ อินเตอร์เนชั่นแนล จำกัด	ปทุมธานี	0-2153-4698	0-2153-4697
115	บริษัท ไทย มิลเลี่ยน ฟรุ๊ต จำกัด	กรุงเทพมหานคร	02-3318445	02-3318445
116	บริษัท สุรินำ ฟู้ด จำกัด	กรุงเทพมหานคร	02-4397844-49	02-8640182

117	บริษัท ซอฟท์เวย์ จำกัด	ปทุมธานี	0-2986-5281-2	0-2986-5284
118	บริษัท ทิมฟู้ด จำกัด	กรุงเทพมหานคร	0-2691-7886	0-2276-0446
119	บริษัท ทีคิวเอ็ม อินเตอร์ฟูด จำกัด	กรุงเทพมหานคร	0-2963-4466	0-2963-4477
120	บริษัท เอ็กซ์โซไทย จำกัด	กรุงเทพมหานคร	0-2963-4466	0-2963-4477
121	บริษัท ซันไชน์ อินเตอร์เนชั่นแนล จำกัด	ปทุมธานี	02-5337199	02-5337455
122	ชื่อที่ใช้ในการประกอบพาณิชยกิจ " นายส่ง มะอิสูงเนิน "	ปทุมธานี	08-4161-1984	0-2908-8907
123	บริษัท พริพา ออร์กานิค(ไทยแลนด์) จำกัด	นนทบุรี	08-6985-2152	0-2920-9835
124	บริษัท ที.พี.เฟิร์สท อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2730-3661	0-2730-3791
125	บริษัท ไทยลีการเกษตร จำกัด	กรุงเทพมหานคร	0-2676-0431-5	0-2676-4883
126	ชื่อที่ใช้ในการประกอบพาณิชยกิจ "พงศ์วาณิช"	กรุงเทพมหานคร	08-9143-2424	0-2363-8823
127	บริษัท เฟรชฟอร์ไลฟ์ จำกัด	กรุงเทพมหานคร	0-2885-0228	0-2418-7408,0-2885-0229
128	บริษัท วินณ์ไฮ้ จำกัด	กรุงเทพมหานคร	0-2675-4718	0-2343-8381
129	บริษัท ทรอปิคอล ฟู้ด เอ็กพอร์ต จำกัด	กรุงเทพมหานคร	085-6641117	0-2362-9886
130	บริษัท ณาธร อินเตอร์เนชั่นแนล โฟรส์เซ่น ฟู้ดส์ จำกัด	ราชบุรี	0-3271-1217	0-3271-1215
131	ห้างหุ้นส่วนจำกัด เอฟ แอนด์ วี อิมปอร์ต เอ็กซ์ปอร์ต	กรุงเทพมหานคร	08-1442-6099	
132	บริษัท อีสต์-เวสต์ ไดเร็ค เซอร์วิสเซส จำกัด	กรุงเทพมหานคร	0-2702-6075	0-2702-6075
133	บริษัท บลู ฟรุ๊ต จำกัด	กำแพงเพชร	0-2350-28289 ต่อ17	0-2350-3883-4
134	บริษัท เฟรช เมคเกอร์ จำกัด	กรุงเทพมหานคร	0-2674-4903-4	0-2674-4910
135	บริษัท ดัชเชส ฟลอร่า จำกัด	นครปฐม	0-2482-1650-4	0-2482-1655
136	บริษัท ไทย เฟรช อินเตอร์เนชั่นแนล จำกัด	ปทุมธานี	0-2995-6691-2	0-2995-6693
137	บริษัท ฐานะมั่งคั่ง จำกัด	กรุงเทพมหานคร	0-2623-7543	0-2225-8544
138	ห้างหุ้นส่วนจำกัด บางกอกมะขามหวาน	กรุงเทพมหานคร	0-2270-1934	0-2279-4487
139	บริษัท เวนเจอร์เทค มาร์เก็ตติ้ง จำกัด	กรุงเทพมหานคร	0-2691-9717	0-2691-9736
140	บริษัท นิวเซ็พ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2447-2503	0-2447-0145
141	บริษัท อาจิเซน (ประเทศไทย) จำกัด	กรุงเทพมหานคร	0-2718-5274-80	0-2319-6464
142	บริษัท ช้างไทย เทรดดิ้ง จำกัด	กรุงเทพมหานคร		
143	ห้างหุ้นส่วนจำกัด พรหมคีรี อิมปอร์ต เอ็กซ์ปอร์ต	นครศรีธรรมราช	0-7539-6244	0-7539-6244
144	บริษัท สยาม จัมโบ้ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2982-7036	0-2982-4812
145	บริษัท อกริเฟร็ช จำกัด	นนทบุรี	0-2231-2934-43	0-2231-2948
146	บริษัท สยาม อะโกร เฟรช จำกัด	ปทุมธานี	0-2987-5884	0-2987-5884
147	บริษัท เตยหอมแอนด์ซัน อะกริฟู้ดส์ จำกัด	นครปฐม	0-3425-4252	0-3425-4252
148	บริษัท วาย เจ ซี เทรดดิ้ง จำกัด	ปทุมธานี	08-1655-9359	0-2995-1356
149	บริษัท โกลเด้น ไลน์ บิสซิเนส จำกัด	กรุงเทพมหานคร	0-2510-0051	0-2510-9412
150	บริษัท ไตรเทค อิมเพค จำกัด	สมุทรปราการ	08-7453-3772	0-2349-4148
151	ชื่อที่ใช้ในการประกอบพาณิชยกิจ " เดอะ เลมอน ลีฟ "	นนทบุรี	08-9485-4994	-
152	บริษัท บี.ซี.เอ.อาร์ จำกัด	กรุงเทพมหานคร	08-9891-4842	0-2907-4696
153	ห้างหุ้นส่วนจำกัด ทรอพปิคอล ฟอร์ซ	หนองคาย	0-3849-4549-50	0-3849-4551
154	บริษัท ไรซิง (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	0-2543-6931	0-2543-6932
155	บริษัท อิน-ซีซั่นส์ ฟู้ดส์ จำกัด	ชลบุรี	0-2259-1938-44	0-2259-1946
156	ห้างหุ้นส่วนจำกัด ฟรุ๊ต โปรดักส์	จันทบุรี	0-3932-8025	0-3932-8025
157	บริษัท เฮง เฮง อิมพอร์ท-เอ็กซ์พอร์ท จำกัด	ชลบุรี	0-2732-1613	0-2732-1612
158	บริษัท โกลเด้นท์ ฟรุ๊ตส์ อิมพอร์ท-เอ็กซ์พอร์ท จำกัด	ชลบุรี	0-2732-1613	0-2732-1612
159	บริษัท หยวน เซิ่ง เฟรช จำกัด	เชียงใหม่	0-5323-1101	0-5323-1099
160	บริษัท เยส วี แคน เอ็กซ์ปอร์ต จำกัด	กรุงเทพมหานคร	0-2895-7901	0-2895-7901
161	บริษัท ไทยคอมมอดิตี้ จำกัด	กรุงเทพมหานคร	0-2745-6954-7	0-2745-6579
162	บริษัท อัมรัตน์ โปรดักส์ จำกัด	ฉะเชิงเทรา	0-2739-3549	0-3852-5703
163	ห้างหุ้นส่วนจำกัด พรมกังวาน	เชียงใหม่	0-5396-6116	0-5396-6177

164	ห้างหุ้นส่วนจำกัด ทองเงากรุ๊ป	กรุงเทพมหานคร	0-2791-0623	0-2791-0623
165	บริษัท ซีซั่น เฟรช จำกัด	กรุงเทพมหานคร	0-2221-7470	0-2224-4882
166	ห้างหุ้นส่วนจำกัด เค เค เค เฟรชฟรุ๊ต เชียงใหม่	เชียงใหม่	0-5331-1306	0-5382-4255
167	บริษัท ที.พี.เฟิร์สท อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2730-3661	0-2730-3490
168	บริษัท สยาม อินเตอร์ เฟรท ฟรูทส์ จำกัด	กรุงเทพมหานคร	0-2721-6473,08-6304-2927	0-2721-6474
169	บริษัท ควีนสทีน จำกัด	สมุทรปราการ	08-1846-4830	0-2749-7390
170	บริษัท บลู ริเวอร์ โปรดักส์ จำกัด	กรุงเทพมหานคร	08-1850-2581	-
171	บริษัท เอเอ็มซี เอ็นเตอร์ไพรส์ จำกัด	ปทุมธานี	08-6602-2020	-
172	บริษัท ลานนาเกษตรอุตสาหกรรม จำกัด	เชียงใหม่	0-5342-1389-95	0-5342-0791
173	บริษัท เกรซอินเตอร์ไพร์ส จำกัด	สิงห์บุรี	0-2512-2302	0-2930-3279
174	บริษัท อุตสาหกรรมอาหาร ส.ขอนแก่น จำกัด (มหาชน)	กรุงเทพมหานคร	0-2391-1010	0-2392-3743
175	ห้างหุ้นส่วนจำกัด ทริพเพิล เอ ฟรุ๊ต	ปทุมธานี	02-3502828	02-3503884
176	ห้างหุ้นส่วนจำกัด สิริรุ่งเรืองสหกิจ	เพชรบุรี	08-1425-0768	0-3243-8033
177	บริษัท โลตัสมาร์เก็ตติ้ง จำกัด	กรุงเทพมหานคร	0-2267-7685	0-2237-6566
178	ห้างหุ้นส่วนจำกัด เชอรี่เฟรชฟรุตแอนด์เวจเทเบิ้ล	ฉะเชิงเทรา	08-1940-1086	-
179	บริษัท ลิโทน ไบโอเทค จำกัด	สมุทรปราการ	0-2743-1172	0-2743-1175
180	บริษัท ไพน์ เวลตี้ จำกัด	กรุงเทพมหานคร	08-0452-1643	0-2476-7195
181	ห้างหุ้นส่วนจำกัด เจริญวัย เทรดดิ้ง	สระบุรี	08-1759-7700	0-3628-3023
182	บริษัท เค.วี.แอล.เอส. จำกัด	กรุงเทพมหานคร	0-2736-9994	0-2736-9994
183	บริษัท ฟูลี่ ลัคกี้ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2674-4903-4	0-2674-4910
184	ชื่อที่ใช้ประกอบพาณิชยกิจ"ธัญลักษน์ หิรัณย์พศุตม์"	นนทบุรี	08-9261-2260	-
185	บริษัท เอทนิค เพนต้า จำกัด	กรุงเทพมหานคร	0-2948-4071	0-2948-4072
186	บริษัท มัลติเฟรช จำกัด	กรุงเทพมหานคร	0-2460-2277	0-2460-2282
187	บริษัท พีแอนด์เอฟ เทคโน จำกัด	กรุงเทพมหานคร	0-2942-7021-3	0-2942-7024
188	บริษัท ยูนิแคร์ อินเตอร์เนชั่นแนล จำกัด	กรุงเทพมหานคร	0-2641-3420-5	0-2247-2914
189	บริษัท เอ เฟรช เอ็กซ์ปอร์ต จำกัด	นครปฐม	0-2482-1651-4	0-2482-1655
190	บริษัท เฮอริเทรด จำกัด	สมุทรปราการ	0-2758-9209	0-2758-8784
191	บริษัท อดาบี ฟรุตส์ โพรเซสซิ่ง จำกัด	กรุงเทพมหานคร	0-2971-4617	0-2552-6105
192	บริษัท แอสโซซิเอทเต็ด ฟูด โพรเซสเซอร์ จำกัด	กรุงเทพมหานคร	02-3813200	02-3819696
193	บริษัท ไทย อินเตอร์เนชั่นแนล แพคกิ้ง จำกัด	นครปฐม	02-8067539	02-8067539
194	บริษัท เหว่ย หงษ์ (ไทยแลนด์) จำกัด	กรุงเทพมหานคร	08-9780-9919	0-2914-5485
195	บริษัท สไมล์ ฟรุ๊ต จำกัด	ระยอง	0-3863-3300-1	0-3863-3261
196	บริษัท เกียรติฟ้า จำกัด	กรุงเทพมหานคร	02-7474526-30	02-7474560
197	บริษัท ที.ซี เฟรช มาร์เก็ตติ้ง จำกัด	ปทุมธานี	02-9020898-99	02-9020901
198	บริษัท ยูเนี่ยนฟรอสท์ จำกัด	กรุงเทพมหานคร	02-3618950	02-3618949
199	ห้างหุ้นส่วนจำกัด สุพรรณบุรี อินเตอร์เนชั่นแนล (เอส.พี)	สุพรรณบุรี	086-1528214	038-888252
200	บริษัท อาร์ แอนด์ อาร์ เฟรช เอ็กซ์เพรส จำกัด	สมุทรปราการ	02-3250529-30	02-3250527
201	บริษัท โอ เอ็น เอส (ประเทศไทย) จำกัด	นนทบุรี	02-9270796	02-9270796
202	บริษัท แวนด้าโฟรเซ่น จำกัด	กาญจนบุรี	034-641442-3	034-641040
203	บริษัท ชัด ชล อินเตอร์ ผักสด แพ็คเฮ้าส์ จำกัด	นครปฐม	089-6030173	02-8140713
204	บริษัท เอ็นที ฟู้ด อินเตอร์เทรด จำกัด	นครปฐม	034-378227	034-378227
205	ห้างหุ้นส่วนจำกัด เอส ที บี เอเยนซี่ จำกัด	เชียงใหม่	082-7628709	
206	บริษัท บลูเจย์ จำกัด	กรุงเทพมหานคร	02-5143230	02-5143229
207	นางจันทนา ชัยรัตน์ ชื่อที่ใช้ในการประกอบพาณิชยกิจ" จันทนา"	กรุงเทพมหานคร	08-0423-4830	0-0472-7216

APPENDIX D

Questionnaires set 1 (English version)

Part 1: Respondent and company information

1. What is your name?
   ………………………………………………………………………………
2. What is your position in the company?
   - ☐ Sale Manage
   - ☐ Logistic Manager
   - ☐ Customer service Manager
   - ☐ Market Manager
   - ☐ Other, please specify………..……………………………………
3. What is your responsibility?
   - ☐ Sell products
   - ☐ Quality control
   - ☐ Logistic management (arranges transportation and export document)
   - ☐ Customer care
   - ☐ Other, please specify ……………………………………………
4. What is the size of your company?
   - ☐ Small (≥50 employees)
   - ☐ Medium (≥200 employees)
5. Are you the producer and/or exporter of Orchid?
   - ☐ Producer
   - ☐ Exporter
   - ☐ Both producer and exporter
6. When the company was established?
   ……………………………………..
7. What is the competitive advantage of your product over existing competitors in the Orchid industry?
   - ☐ Production capacity
   - ☐ Various Orchid species
   - ☐ Lower price
   - ☐ Sales strategy
   - ☐ Meet international standard
   - ☐ Other, please specify…………………………………………………
8. How long has the company been exporting to the EU?
   - ☐ Less than 1 year
   - ☐ 2-5 years
   - ☐ 6-10 years
   - ☐ More than 10 years

9. What is the main reason of your company to export Orchids?
   - ☐ Heritage from pervious manger ☐ Expand market
   - ☐ Government support ☐ For country reputation
   - ☐ Other, please specify……………………………………………..
10. Apart from the EU, where do you export your orchid to?
   - ☐ USA ☐ Asia ☐ Australia
   - ☐ None ☐ Other, please specify……………….
11. What is the major destination in exporting your Orchid?
   - ☐ USA ☐ Australia ☐ Asia
   - ☐ Australia ☐ Other, please specify……………….
   - ☐ EU please specify country……………………….
12. How many percentages of total production that you exported?
   - ☐ Less than 20% ☐ 20%-50% ☐ 51%-80% ☐ More than 80%
13. How many percentages of your total export that exported to the EU?
   - ☐ Less than 20% ☐ 20%-50% ☐ 51%-80% ☐ More than 80%

Part 2: Information about the Orchids

14. What is the problem of orchid that you confront most during exporting?
   - ☐ Product damage ☐ Delay of document
   - ☐ Delay of transportation ☐ Custom inspection
   - ☐ Other, please specify ………………………………………………
15. What is the advantage of Thai Orchid over other countries orchids?
   - ☐ Variously of species ☐ Cheaper prices
   - ☐ Meet the world standard ☐ High reputation in quality
   - ☐ High production capacity
   - ☐ Other, please specify………………………………………………..
16. What is the main problem of Orchids production in Thailand?
   - ☐ Diseases ☐ High cost in production
   - ☐ Lack of R&D ☐ The wealth
   - ☐ Lack of government supports
   - ☐ Other, please specify…………………………………………………

Part 3: The issue related to export orchid to the EU

Please indicate your opinion regarded to issues and problems that occurred during export orchid to the EU in each of the following statements:

5 = strongly agree**4** = Agree **3** = Neutral**2** = Disagree**1** =strongly disagree

Question	Opinion				
	Strongly agree to Strongly disagree				
	5	4	3	2	1
Internal factors					
17. Low production capacity					
18. The price of orchid is not competitive and fluctuate					
19. Lack of new investment					
20. Lack of understanding in the EU's policies					
21. Lack of consistent R&D					
22. Thai orchid exporters have high experience					
23. Lack of storage facility					
External factors					
24. EU's tariff is too high					
25. EU's set up the quota against Thai orchid					
26. Too many standard policies from the EU					
27. EU doesn't support technology transfer					
28. EU's economic crisis decreased import volume					
29. High competitors between Thai exporters in the EU's market					
30. EU has high technology in production and R&D					
31. Cost of transportation is too high					
Others					
32. Decrease of customer's demand toward orchid					
33. New substitute flower in the EU					
34. They are orchid producers in the EU					
35. High of cost of labour					
36. Lack of labour force					

37. What is the main problem in exporting orchid to the EU?

☐ Standard regulation (such as plant health control)

☐ Transportation cost ☐ Tariff ☐ Time of transportation

☐ Other, please specify……………

Part 4: The impact of FTA in exporters' perception

38. Are you aware of the proposed of FTAs negotiation between EU and Thailand?

☐ Very well ☐ Little ☐ Not at all (please read last page)

Please indicate your opinion about benefits of EU-Thailand FTA toward Thai orchid in each of the following statements:

5 = strongly agree **4** = Agree **3** = Neutral **2** = Disagree **1** =strongly disagree

Question	**Opinion**				
	Strongly agree to Strongly disagree				
	5	**4**	**3**	**2**	**1**
39. Thai Orchid received technology transfer in R&D					
40. Amount of Thai Orchid's export will increase					
41. Amount of flowers' import from the EU will increase					
42. The price of Thai Orchid will increase					
43. Thai Orchid will gain competitiveness in the EU					
44. FTA will help reduce cost of transaction					
45. New investment will come to Thai orchid industry					
46. New SMEs of Thai orchid exporters will rise					
47. EU-Thailand FTA will benefit SMEs more than large firms					
48. EU-Thailand FTA will give bargaining power to Thai Orchid exporters (such as price)					
49. Thai Orchid must develop to meet EU's standard					
50. Thai Orchid export industry will be better with FTA					
51. Overall FTA will give benefit to Thailand					

52. Do you think the EU-Thailand FTA will be useful for your company?

☐ Yes ☐ Maybe ☐ No

53. Do you think the EU-Thailand FTA will benefit Thai orchid industry?

☐ Yes ☐ Maybe ☐ No

54. What is the outcome of the EU-Thailand FTA that would benefit your company the most?

☐ Tariff reduction ☐ Compromise in EU's policies

☐ Cooperation in R&D ☐ Challenge from new competitors

- ☐ Other, please specify…………………………………………………….

55. What will be the direct impact to your company as a result of the EU-Thailand FTA?

- ☐ High competition
- ☐ Improvement of R&D
- ☐ Increase of sales volume
- ☐ Investment flow
- ☐ Uncertainty on new policies
- ☐ Other, please specify…………………………………………………….

56. Do you want the EU-Thailand FTA to be completed?

- ☐ Yes (skip to 52)
- ☐ No

57. Why you do not want the EU-Thailand FTA to be completed?

- ☐ Flow of Flowers from EU
- ☐ New standard policies
- ☐ More competitors
- ☐ Lack of information about FTA
- ☐ Other, please specify……………………………………………….

58. What will be your suggestion to Thai government about FTAs negotiation?

………………………………………………………………………………..

****

Thank you for your cooperation

Brief information about EU-Thailand FTA

The FTA (Free Trade Agreements) is an agreement between two parties to remove or reduce all trade barriers such as tariff, and quota on goods and services. The EU-Thai FTA started in March 2009 and a year later the committee from Trade Negotiation department had approved and submitted draft of EU-Thailand FTA negotiation to the congress of Thailand for consent to pursuit next step of negotiation toward an agreement with the EU (please go back to question 35)[109]

[109] The Author's conclusion from chapter 1.

Questionnaire Set 1 (Thai version)

แบบสอบถามโปรดใส่เครื่องหมาย √หน้าคำตอบของท่าน

ส่วนที่1 : ข้อมูลของบริษัทและผู้ตอบแบบสอบถาม

1. ท่านชื่ออะไร

   ………………………………………………………………………..

2. ท่านดำรงตำแหน่งอะไรในบริษัท

   ___ ผู้จัดการฝ่ายขาย ___ผู้จัดการฝ่ายขนส่ง

   ___ ผู้จัดการฝ่ายบริการลูกค้า ___ผู้จัดการฝ่ายการตลาด

   ___ อื่นๆโปรดระบุ ………………………………………………………..

3. หน้าที่ของท่านคืออะไร

   ___ ขายสินค้า ___ ตรวจสอบสินค้า

   ___ จัดส่งสินค้า ___ ดูแลลูกค้า

   ___ อื่นๆโปรดระบุ ………………………………………………………..

4. บริษัทของท่านเริ่มก่อตั้งขึ้นเมื่อไร

   ………………………………………………………………………………….

5. บริษัทของท่านมีโครงสร้างแบบใด

   ___ ขนาดเล็ก (พนักงานไม่เกิน 50 คน) ___ ขนาดกลาง(พนักงานไม่เกิน 200คน)

6. บริษัทของท่านเป็นผู้ผลิตหรือผู้ส่งออกกล้วยไม้

   ___ ผู้ผลิต ___ ผู้ส่งออก ___ทั้งผู้ผลิตและส่งออก

7. ปัจจัยใดที่ทำให้ธุรกิจกล้วยไม้ของท่านมีข้อได้เปรียบเหนือคู่แข่ง

   ___ กำลังการผลิต ___ สายพันธุ์ที่หลากหลาย

   ___ ราคาถูกกว่า ___กลยุทธการขาย

   ___ มาตรฐานเทียบเท่าต่างประเทศ ___ อื่นๆโปรดระบุ …………………………………………..

8. บริษัทของท่านทำการส่งออกกล้วยไม้มานานแค่ไหน

   ___ น้อยกว่า 1 ปี ___2-5 ปี ___ 6-10 ปี ___ มากกว่า 10 ปี

9. อะไรคือเหตุผลที่ทำให้บริษัทของท่านทำการส่งออกกล้วยไม้

___ ทำต่อจากผู้จัดการคนก่อน ___ขยายตลาด ___ สนับสนุนจากรัฐบาล

___ เพื่อประเทศชาติ ___ อื่นๆโปรดระบุ …………………………………………..

10. นอกจากสหภาพยุโรปแล้ว ท่านส่งออกกล้วยไม้ไปที่ไหน

___ สหรัฐอเมริกา ___ เอเชีย ___ ออสเตรเลีย

___ไม่มี ___ อื่นๆโปรดระบุ …………………………………………

11. ท่านส่งออกกล้วยไม้ไปที่ไหนมากที่สุด

___สหรัฐอเมริกา ___ ออสเตรเลีย ___ เอเชีย ___ สหภาพยุโรป

___ อื่นๆโปรดระบุ …………………………………………

12. ปริมาณกล้วยไม้ที่ส่งออกคิดเป็นกี่เปอร์เซ็นของปริมาณการผลิต(สั่งซื้อ)ทั้งหมด

___น้อยกว่า 20% ___ 20%-50% ___ 51%-80% ___ มากกว่า 80%

13. ปริมาณกล้วยไม้ที่ส่งออกไปสหภาพยุโรปคิดเป็นกี่เปอร์เซ็นของปริมาณการผลิต(สั่งซื้อ)ทั้งหมด

___น้อยกว่า 20% ___ 20%-50% ___ 51%-80% ___ มากกว่า 80%

ส่วนที่ 2 : ข้อมูลทั่วไปของกล้วยไม้

14. อะไรคือปัญหาที่ท่านพบบ่อยที่สุดเวลาส่งออกกล้วยไม้

___ สินค้าเสียหาย ___ ปัญหาเกี่ยวกับเอกสาร

___ การขนส่งล่าช้า ___ การตรวจสอบของกรมศุลกากร

___ อื่นๆโปรดระบุ ……………………………………………………………

15. ปัจจัยใดที่ทำให้กล้วยไม้ไทยได้เปรียบกล้วยไม้ที่อื่น

___ ความหลากหลายสายพันธุ์ ___ ราคาถูกกว่า

___ มาตรฐานระดับโลก ___ คุณภาพสูง

___ กำลังการผลิตสูง ___ อื่นๆโปรดระบุ …..…………………………………………

16. ปัญหาใดที่ท่านพบมากในการเพาะปลูกกล้วยไม้ในประเทศไทย

___ โรค ___ต้นทุนสูง

___ ขาดการพัฒนา ___สภาพอากาศ

___ขาดการสนับสนุนจากรัฐบาล ___ อื่นๆโปรดระบุ ……………………………………………

ส่วนที่ 3 : ปัญหาที่พบในการส่งออกกล้วยไม้ไทยไปสหภาพยุโรป

โปรดแสดงความเห็นของท่านต่อปัญหาที่พบในการส่งออกกล้วยไม้ไทยไปสหภาพยุโรป โดยใส่เครื่องหมาย / ลงในตารางด้านล่าง

5= เห็นด้วยมากที่สุด , 4= เห็นด้วย , 3 = เฉยๆ , 2 = ไม่เห็นด้วย, 1=ไม่เห็นด้วยมากที่สุด

คำถาม	ความคิดเห็น				
	เห็นด้วยที่สุด ---> ไม่เห็นด้วยที่สุด				
	5	**4**	**3**	**2**	**1**
ปัญหาจากภายใน					
17. กำลังการผลิตไม่เพียงพอ					
18. ราคาของกล้วยไม้ไทยไม่สามารถแข่งขันกับที่อื่นได้					
19. ราคาของกล้วยไม้ไทยไม่คงที่					
20. ไม่ดึงดูดนักลงทุนรายใหม่					
21. ขาดความเข้าใจในระเบียบของสหภาพยุโรป					
22. ขาดการพัฒนาอย่างต่อเนื่อง					
23. ไม่มีสถานที่เหมาะสมในการจัดเก็บกล้วยไม้					
ปัญหาจากภายนอก					
24. สหภาพยุโรปกำหนดภาษีนำเข้าสูงเกินไป					
25. สหภาพยุโรปจำกัดปริมาณนำเข้ากล้วยไม้ไทย					
26. สหภาพยุโรปมีกฎระเบียบที่เกี่ยวกับมาตรฐานที่ซับซ้อน					
27. สหภาพยุโรปไม่ให้การสนับสนุนด้านเทคโนโลยี					
28. ปัญหาเศรษฐกิจของสหภาพยุโรป ทำให้อัตราการนำเข้าลดลง					
29. ผู้ส่งออกไทยต้องเผชิญกับตลาดการแข่งขันที่สูงในสหภาพยุโรป					

คำถาม	ความคิดเห็น				
	เห็นด้วยที่สุด ---> ไม่เห็นด้วยที่สุด				
	5	4	3	2	1
30. ผู้ผลิตในยุโรปมีเทคโนโลยีในการผลิตที่สูงกว่าผู้ผลิตของไทย					
31. ค่าใช้จ่ายในการส่งออกสูงเกินไป					
ปัญหาอื่นๆ					
32. ลูกค้าเปลี่ยนไปซื้อดอกไม้ชนิดอื่น ทำให้ยอดขายลดลง					
33. มีดอกไม้ประเภทอื่นเข้ามาแทนที่กล้วยไม้ไทย					
34. สหภาพยุโรปสามารถผลิตกล้วยไม้ได้เพิ่มขึ้น					
35. ค่าแรงขั้นต่ำสูงขึ้น ทำให้ต้นทุนสูงขึ้น					
36. ขาดแคลนแรงงานในการผลิต					

37. อะไรคือปัญหาหลักในการส่งออกกล้วยไม้ไปสหภาพยุโรป
___กฎระเบียบเกี่ยวกับมาตรฐานสินค้า(เช่น สุขภาพของพืช)

___ค่าขนส่ง ___ ภาษีอากร ___ ระยะเวลาการขนส่ง

___ อื่นๆโปรดระบุ ....

ส่วนที่ 4 : ผลกระทบที่คาดว่าจะเกิดขึ้นจากข้อตกลงการค้าเสรีต่อตัวท่านหรือบริษัทของท่าน

38. ท่านทราบหรือไม่ว่าขณะนี้มีการเจรจาการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทย
___ ทราบ ___ เล็กน้อย ___ ไม่ทราบ(โปรดอ่านข้อความในหน้าสุดท้าย)

โปรดแสดงความเห็นของท่านตามข้อความด้านล่างเกี่ยวกับผลประโยชที่จะเกิดขึ้นจากข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทย โดยใส่เครื่องหมาย / ลงในตารางด้านล่าง

5= เห็นด้วยมากที่สุด , 4= เห็นด้วย , 3 = เฉยๆ , 2 = ไม่เห็นด้วย, 1=ไม่เห็นด้วยมากที่สุด

คำถาม	**ความคิดเห็น**				
	เห็นด้วยที่สุด ---> ไม่เห็นด้วยที่สุด				
	5	**4**	**3**	**2**	**1**
39. เกิดความร่วมมือทางด้านพัฒนาการผลิตและวิจัย					
40. ปริมาณการส่งออกกล้วยไม้เพิ่มขึ้น					
41. มีการนำเข้าดอกไม้จากสหภาพยุโรปมากขึ้น					
42. ราคากล้วยไม้ไทยสูงขึ้น					
43. กล้วยไม้ไทยสามารถแข่งขันกับดอกไม้ชนิดอื่นในสหภาพยุโรป					
44. ข้อตกลงการค้าเสรีจะทำให้ค่าใช้จ่ายด้านธุรกรรมต่างๆลดลง					
45. เกิดการลงทุนในอุตสาหกรรมกล้วยไม้ไทยมากขึ้น					
46. ผู้ส่งออกกล้วยไม้ไทยขนาดเล็กและกลางจะมีจำนวนเพิ่มขึ้น					
47. ผู้ส่งออกกล้วยไม้ไทยขนาดเล็กและกลางจะได้รับผลประโยชน์จากข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทยมากกว่าผู้ส่งออกขนาดใหญ่					
48. ข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทยจะทำให้ผู้ส่งออกมีอำนาจต่อรองเพิ่มขึ้น					
49. กฎระเบียบและมาตรฐานของสหภาพยุโรปจะทำให้เกิดจากพัฒนาคุณภาพกล้วยไม้ไทย					
50. ข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทยจะเป็นผลดีต่ออุตสาหกรรมกล้วยไม้ไทย					
51. โดยรวมข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทยจะเป็นประโยชน์ต่อประเทศไทย					

52. ท่านคิดว่าข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทยมีผลดีต่อบริษัทของท่านหรือไม่

___ มี ___อาจจะมี ___ไม่มี

53. ท่านคิดว่าข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทย จะมีผลดีต่ออุตสาหกรรมกล้วยไม้ไทยหรือไม่

___ มี ___อาจจะมี ___ไม่มี

54. อะไรคือผลประโยชน์ที่ท่านคาดว่าจะได้รับมากที่สุดจากข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทย

___ ลดภาษีนำเข้า ___ สหภาพยุโรปผ่อนปรนกฎระเบียบการนำเข้า___ ยอดขายที่เพิ่มขึ้น

___ ความร่วมมือด้านการวิจัยและพัฒนา ___มีการแข่งขันในตลาดเพิ่มขึ้น___ อื่นๆ โปรดระบุ

55. อะไรคือผลกระทบโดยตรงต่อบริษัทของท่านจากข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทย

___ คู่แข่งเพิ่มขึ้น ___ พัฒนาด้านการผลิต ___ การสั่งซื้อเพิ่มขึ้น

___ การลงทุนที่เพิ่มขึ้น ___ ความไม่แน่นอนเกี่ยวกับกฎระเบียบของสหภาพยุโรป

___ อื่นๆ โปรดระบุ ……………………………………………................................

56. ท่านต้องการให้ข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทยเป็นผลสำเร็จหรือไม่

___ต้องการ (ข้าม 58) ___ ไม่ต้องการ

57. เหตุใดท่านจึงไม่ต้องการให้มีข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทย

___ กฎระเบียบข้อบังคับที่อาจเพิ่มขึ้น ___ การนำเข้าดอกไม้จากสหภาพยุโรปเพิ่มขึ้น

___ คู่แข่งที่อาจเพิ่มขึ้น ___ ไม่ทราบข้อมูลที่เกี่ยวกับข้อตกลงการค้าเสรีอย่าเพียงพอ

___ อื่นๆ โปรดระบุ ……………………………………..................

58. ข้อเสนอแนะต่อรัฐบาลไทยในเรื่องการเจรจาข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับไทย

....

****

ข้อมูลโดยสังเขปเกี่ยวกับข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทย

ข้อตกลงการค้าเสรี คือการตกลงระหว่างสองประเทศหรือสองฝ่ายที่จะลดหรือยกเว้นอุปสรรคทางการค้าทั้งหมด เช่น ภาษีอากร และ ปริมาณที่นำเข้าได้ ของสินค้าและบริการ ข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทยเริ่มขึ้นเมื่อเดือนมีนาคม พ.ศ. 2552 หลังจากนั้นหนึ่งปีกรมการเจรจาการค้าระหว่างประเทศได้เสนอร่างข้อตกลงการค้าเสรีระหว่างสหภาพยุโรปกับประเทศไทยต่อรัฐสภาเพื่อขออนุมัติ และดำเนินการเจรจากับสหภาพยุโรปในขั้นต่อไป (โปรดกลับไปคำถามข้อที่ 38)

Qualitative questionnaires set 2 (English version)

Part1: Information about respondent

1. What is your position in this organization?
   ……………………………………………………………….
2. What is your responsibility in (or knowledge about) the EU-Thailand FTA negotiation?
   ………………………………………………………………

Part 2: General information about Thai Orchids

3. What is advantage of Thai Orchid exporter over competitors?
   ………………………………………………………….
4. What are the obstacles for Thai Orchid exporters to export to the EU market?
   …………………………………………………………
5. Do you support the EU-Thailand FTA negotiation? Why or why not?
   …………………………………………………………
6. What do you expect the scope of the EU-Thailand FTA eventually to be?
   …………………………………………………………

Part 3: The impact of the EU-Thailand FTA

7. What will be the result of the EU-Thailand FTA that can affect Thai Orchid exporters? Is it good or bad for Thai Orchid industry?
   …………………………………………………………
8. How would you rate the benefit of the EU-Thailand FTA toward Thai Orchid exporters on the scale 1 to 10 (1 is not benefit and 10 most benefit) and why?
   …………………………………………………………

Part 4: Future of Thai Orchids export

9. Should the government support Thai Orchids exporters? If yes, how?
   …………………………………………………………
10. What Thai government should do in order to promote and educate Thai Orchid exporter about FTA?
   …………………………………………………………

Qualitative questionnaires set 2 (Thai version)

ส่วนที่ 1: ข้อมูลทั่วไปของผู้ให้สัมภาษณ์

1. ปัจจุบันท่านดำรงตำแหน่งอะไร...
2. ท่านมีหน้าที่ความรับผิดชอบหรือความรู้อะไรเกี่ยวกับการเจรจาการค้าเสรีสหภาพยุโรป-ไทยบ้าง
   ....

ส่วนที่ 2: ข้อมูลทั่วไปเกี่ยวกับกล้วยไม้ไทย

3. อะไรคือข้อได้เปรียบของกล้วยไม้ไทยเหนือคู่แข่งรายอื่น
   ....
4. อะไรคืออุปสรรคในการส่งออกกล้วยไม้ไทยไปยังสหภาพยุโรป
   ....
5. ท่านเห็นด้วยกับการเจรจาการค้าเสรีสหภาพยุโรป-ไทยหรือไม่ในมุมมองของการส่งออกกล้วยไม้ไทย
   ....
6. ท่านคิดว่าการเจรจาการค้าเสรีจะให้อะไรแก่การส่งออกกล้วยไม้ไทย
   ....

ส่วนที่ 3: ผลกระทบของการค้าเสรีต่อกล้วยไม้ไทย

7. อะไรคือผลกระทบโดยตรงที่ผู้ส่งออกกล้วยไม้ไทยและอุตสาหกรรมกล้วยไม้จะได้รับจากการค้าเสรีสหภาพยุโรป-ไทย
   ....
8. ถ้าท่านสามารถให้คะแนนผลประโยชน์ที่อุตสาหกรรมส่งออกกล้วยไม้ไทยจะได้รับจากการค้าเสรี ท่านจะให้เท่าไร (10 คือมากที่สุด,1คือน้อยที่สุด)
   ....

ส่วนที่ 4: อนาคตของการส่งออกกล้วยไม้ไทย

9. รัฐบาลมีแผนอย่างไร ในการสนับสนุนการส่งออกกล้วยไม้ไทย
   ....
10. ปัจจุบันมีผู้ส่งออกกล้วยไม้จำนวนน้อยมากที่มีความรู้ความเข้าใจเกี่ยวกับการค้าเสรี ไม่ทราบรัฐบาลจะทำอย่างไรเพื่อให้ความรู้และข้อมูลแก่ผู้ส่งออก
    ....

APPENDIX E

1. *Characteristics of the Respondents*

The characteristics of the respondents are given in the part 1 of questionnaire. The table below is the summarize of distinctive characteristics from the respondents which had been processed.

Table 1: Characteristics of the respondent part 1

Position	Responsibilities	Years of experience	Reason of export
Marketing Manager	**Selling goods**	**2-5**	**Expand the market**
34	53	43	65
Sale Manager	**Shipping**	**6-10**	**Pervious manager**
26	**18**	**28**	31
Logistics Manager	**Customer Care**	**More than 10**	
22	**15**	**25**	
Customer Service	**Quality check**		
10	8		
Other	**Logistic**		
4	10		
	Other (Owner and consultant)		
	4		

- *Position*

The respondents provided their position without missing value. The result showed that 35.4% of Marketing Manager, 27.1% of Sales Manager, 22.9% of Logistics Manger and 10.4% of Customer Service manager. Also it has only 4.2% of respondent who are owner of the company and consultant.

- *Responsibilities*

The respondents provided their responsibilities without missing value. The result showed that 55.2 % of respondents work on selling goods and 18.8% and 15.6% of respondents are working on logistics and customer care. Also it has only 8.3% of respondents working on quality control.

- *Years of experience*

The respondents provided their experience on export Thai orchid without missing value. The result showed that 43% of respondents have 2-5 years of experience, 28% of respondents have 6-10 years of experience and only 25% of respondents have experience more than 10 years.

- *Reason of exports*

The respondents provided their reason of exports Thai orchid without missing value. The result showed that 67.7% of respondents exports Thai orchid because they wants to expand the market. Another 32.3% of respondents exports because they follow previous manager's plan and no respondent export because of country reputation or government encourage.

Table2: Characteristics of the respondents part 2

Respondents (n=96)		
Company's size	**Company's role**	**Destination**
Employees less than 50	**Distributor**	**EU**
73	**45**	67
Employees 51-200	**Producer and distributor**	**Asian Countries**
23	**51**	**23**
		Australia
		3
		America
		3

- *Company's size*

The respondents provided their company's size without missing value. The result showed that 76% of respondents are small size company that has less than 50 employees. The remaining 23% of respondents are medium size company that has 51 to 200 employees.

- *Company's role*

The respondents provided their company's role without missing value. The result showed that 46.9% of respondents are doing distribution and 53.1% of respondents are both distributor and producers.

- *Export destinations and export percentages*

According to table above *the* respondents provided their main destination without missing value. The result showed that 69.8% of respondents export to the EU follows by 24% of respondents export to Asian countries and only 3.1% of respondents export to America and Australia.

The respondents provided their main destination and percentage of export without missing value. The result showed that 65.9% of respondents exported more than 20% of their total production or purchase to the EU and only 34.1% of respondents exported less than 20% to the EU.

Table 3: Destination and percentage of export

Destination	Percentage of export			
	Less than 20%	**20%-50%**	**51%-80%**	**More than 80%**
America	0	3	0	0
Australia	0	3	0	0
Asian countries	0	5	16	2
EU	29	25	24	7

The respondents who export to the EU answered without missing value (as in table below). The result showed that 49.4% of respondents ship Thai orchid to Italy, 43.5% of respondent ship Thai orchid to Germany, 4.7% of respondent ship to UK and 2.4 of respondent ship to Spain and Czech Republic.

Table 4: The destination countries in the EU

Countries	Respondents	Percentages
Italy	**42**	**49.4**
Germany	**37**	**43.5**
UK	**4**	**4.7**
Czech Republic	**1**	**1.2**
Spain	**1**	**1.2**

2 The Advantage of Thai Orchid

The respondents answered about their competitive advantage in part 1 and 2 of questionnaire set 1. The below table is information about advantages of Thai orchid acorrding to size of company (small-medium) which had been analyzed.

Table 5: The competitive advantages of Thai orchid defined by company's size

Advantages	Company's size	
	Small	**Medium**
Production capacity	3	0
Variety of species	35	10
Lower price	35	9
Sales strategy	12	4
High quality	10	7

From the table above, the competitive advantages of the small companies came from 36.8% of variety of orchid species and 36.8% of low price. The next advantages are sales strategy with 12.6% and high quality of Thai orchid with 10.5% and 3.2% of respondent answer production capacity provided is advantage of company. For the medium size companies, they advantages came from variety of orchid species with 33.3% and low price with 30%. The 23.3% and 13.3% of advantages for medium size companies came from high quality of orchid and sales strategy.

3 The Problem of Exports Orchid from Exporters

The problems that respondents faced during export orchid are given in part 2 and 3 of questionnaire set 1. The below information is summarized of distinctive problems from the respondents which had been analyzed by SPSS.

Table 6: The frequency problems in export Thai orchid

Problems	Custom inspection	Damaging	Transportation time	None
Respondents	51	34	12	3
Percentage	53.1%	35.4%	12.5%	3.1%

The respondents provided their problems of export Thai Orchid without missing value. The result showed that 53.1% of the respondents have a problem with custom inspection, 35.4% of respondents have product damage's problem and 12.5% have problem with transportation time. They are only 3.1% that have no problem in exporting Thai orchid.

Table 7: The problems in export and problems in production of Thai orchid

Export's problems / Production's problems	Custom inspection	Damaging	Transportation time	Total
Orchid's health	44	30	8	82
High cost of production	5	-	-	5
Lack of development	3	2	-	5
Weather	-	-	4	4
Lack of government support	12	5	3	20

In the table above, it presents as in the relationship between export's problems and production's problems of Thai orchid.

The 53.7%, 36.6% and 9.8% of respondents who have problem with orchid's health and 60%, 25% and 15% of respondents who lack of government support also have problems with custom inspection, damaging and transportation time, respectively. The 62.5% of respondents who have problem with cost of production will have problem with custom inspection same as 60% of respondents who have problem in development also have problem with custom inspection.

Table 8: Problem of exporting Thai orchid to the EU

Problems	Respondents
EU’s regulation	83
Transportation’s cost	2
Taxation	7
Transportation’s time	15

The respondent reported their problem when exporting Thai orchid to the EU without missing value. The result showed that 86.5% of respondents have a problem with EU’s regulation when exporting to the EU. They are only 15.6%, 7.3% and 2.1% of respondents who have problems with transportation’s time, taxation and transportation’s cost, respectively.

4. Potential Impact from EU-Thailand FTA

The 96 respondents answered about potential impact of EU-Thailand FTA on Thai orchid export industry and also on the exporters in part 4 of questions without missing value. The researcher analyzed the raw data by using SPSS to find mean of each question. The answer of questions is 5-point Likert’s scale which consisted of five codes ‘Strongly Agree’ (5), ‘Agree’ (4), ‘Neutral’ (3), ‘Disagree’ (2), and ‘Strongly Disagree’ (1).

Table 12: Expected outcome of EU-Thailand FTA

Factors	Threat	Opportunity	Mean
• Numerous competitors (high or low)	✓		3.82
• One or a few strong competitors (high or low)		✓	2.26
• Cost of inventory such as a warehouse (high or low)	✓		3.99
• Increase in production capacity (high or low)	✓		3.47
• Similar competitors (high or low)		✓	2.59
• High capital required (high or low)		✓	2.01
• No product differentiation (high or low)		✓	2.46
• EU's protection policies (high or low)	✓		3.88
• There are few substitute products(high or low)		✓	2.46
• Supplying industry has few companies (high or low)		✓	1.77
• Supplier's products don't have substitutes (high or low)	✓		3.79
• Supplier's products are an important input (high or low)	✓		3.93
• Supplier's products are differentiated (high or low)		✓	2.42
• Buyers won't purchase large volumes (high or low)		✓	1.94
• Buyers can produce products (high or low)		✓	1.45
• Quality is important to buyers (high or low)	✓		3.80
• Buyers have full information (high or low)	✓		3.80

According to the table above, the researcher combined 'Strongly agree' and 'Agree' together as a result 54% to 87.5% of respondents shared positive opinion about potential impact of EU-Thai FTA toward Thai orchid export on each question. However, they are one question with 38.6% and result as positive impact toward Thai orchid export which is 'Higher price of Thai orchids'. But it has 35.4% of respondents answered on 'Neutral' which means the respondents think EU-Thailand FTA will not create effect on price of Thai orchid.

Finally, from the question 52 and 53, the respondent think Thailand will receive benefits from EU-Thailand FTA with 96.9% for Thai orchid industry and 93.8% for individual export industry.

Table 13: The greatest benefit of EU-Thailand FTA for Thai orchid exporters

Benefits from EU-Thailand FTA	Respondents	Percentage
• **Tariff reduction**	13	13.5%
• **Compromise on EU's import policies**	76	79.2%
• **Market challenge**	6	6.2%
• **Missing value**	1	1%

The 79.2% of respondents answered the greatest benefit from EU-Thailand FTA for Thai orchid exporters is reducing on EU's import regular such as plant health. Also they are 13.5% and 6.2% of respondents answered market challenge and tax reduction would be the greatest benefit from EU-Thailand FTA for Thai orchid exporters.

Table 14: The direct impact of EU-Thailand FTA toward Thai orchid exporters

Direct impactof EU-Thailand FTA	Respondents	Percentage
• **High competitors**	20	20.8%
• **Improvement of R&D**	11	11.5%
• **Increase of sales volume**	48	50%
• **Investment flow**	11	11.5%
• **Uncertainty on new policies**	34	35.4%

The respondents provided their opinion of direct impact of EU-Thailand FTA toward Thai orchid exporters without missing value in question 55 of questionnaire set 1. This information came from 'Multiple Response' question. The result showed that 50% of the respondents answered increase in sales volume, 35.4% of the respondents answered Uncertainty of further EU regulation after FTA and 20.8% of the respondents answered increased in competitors are direct impact on their companies from EU-Thailand FTA. They are only 11.5% that answered for improvement of R&D and investment flow.

5 The Suggestion to Thai Government on EU-Thailand FTA Negotiation

The respondents provided their knowledge and opinion on EU-Thailand FTA negotiation without value missing. The result showed that the 77.1% of respondents want EU-Thailand FTA and only 23% of respondents reject EU-Thailand FTA. However, 23% of respondents who against EU-Thailand FTA are the respondent who have knowledge about negotiation in level of 'Little' to 'Very well'.

Table 15: Respondents' awareness and need of EU-Thailand FTA

Awareness of EU-Thailand FTA	Do you want EU-Thailand FTA to be achieved?		Total
	Yes	No	
Little about it	13	11	24
Very well know	39	11	50
Don't know	22	0	22
Total	74	22	96

The suggestion to Thai government on EU-Thailand FTA negotiation came from 96 respondents who answered open-end question. The answer had been divided into 5 categories which are 'Negotiation base on fairness and justice to Thai orchid exporters and country', 'Negotiation on EU's import regulation', 'Listen to opinion and allow participant of exporters for negotiation, 'Government should focus and support local before go international' and 'Missing value'.

Table 16: Suggestion to Thai government on EU-Thailand FTA negotiation

Categories	Respondent	Percentage
• **Fairness and Justice for exporters**	29	30.2%
• **Reduction of EU's import regulation**	22	22.9%
• **Listen exporter's opinion and allow exporters participant in negotiation**	8	8.3%
• **Government support in export and development**	14	14.6%
• **Missing value**	23	24%

According to the table above, the 30.2% of respondents suggested that negotiation should be fair and justice to Thai orchid exporters and Thailand and 22.9% of respondents suggested that the negotiation should focus on EU's import regulation. Also the 14.6% respondents suggested government should support local before go international and 8.3% of respondents suggested government should take opinion and participant from exporters into negotiation.

APPENDIX F

Interview No.1: Specialist No.1

Part1: Information about respondent

1. What is your position in this organization?
   Professor in Faculty of Economics of Kasetsart University (I1Q2L1)
2. What is your responsibility in (or knowledge about) the EU-Thailand FTA negotiation?
   Published research on "The impact of FTA on Agriculture industry"and also teaching International economics (I1Q3L1)

Part 2: General information about Thai Orchids

3. What is advantage of Thai Orchid exporter over competitors?
   The Thai orchid has three advantages, first, the location of Thailand is perfect for planting orchid because of the tropical wet weather which allows famer to plant and tropical species of orchid. (I1Q5L1)Second, based on previous reason, the Thai orchid has a uniqueness that cannot be found in other countries. (I1Q5L2) "Indonesia has to import root of Thai orchid but after grow and cut, they must import root again.(I1Q5L3) Because the Indonesia is an island and the wind is to strong and salt from the sea can damage the orchid."(I1Q5L4) Lastly, most of Thai orchid farmers are planting Thai orchid for long time. So they have high experience and knowledge of orchid's planting which allow them to adjust, understand and deal with the problems easier.(I1Q5L5)
4. What are the obstacles for Thai Orchid exporters to export to the EU market?
   The Thai exporters will face fewer problems than farmers because the exporters choose to purchase from famer that can produce orchid according to international standard and exporter can ship it immediately after received it. (I1Q6L1) Of course they are some barriers such as standard control on plant health (I1Q6L2)on the other hand Thai farmers are the one that suffer from this standard (I1Q6L3)because they don't have resources to improve production and enough knowledge on export-import policies.(I1Q6L4)

5. Do you support the EU-Thailand FTA negotiation? Why or why not?

   Yes, I support it even though the EU has economic crisis.(I1Q7L1)It still interesting market with high demand on Thai orchid. (I1Q7L2)Moreover, if look over the economic crisis or believe that the EU can overcome it,(I1Q7L3) this is very important concept for Thai export to think about current situation of the EU.(I1Q7L4)

6. What do you expect the scope of the EU-Thailand FTA eventually to be?

   If the EU-Thailand FTA successes, the taxation will be reducing but non-tariff barriers will stricter and increase in regulation. (I1Q8L1) in order to stop the flow of Thai orchid.(I1Q8L2)

Part 3: The impact of the EU-Thailand FTA

7. What will be the result of the EU-Thailand FTA that can affect Thai Orchid exporters? Is it good or bad for Thai Orchid industry?

   FTA will give both good and bad effect to the Thai orchid exporters.(I1Q9L1) On the bad side, with the free trade companies from the EU can build base in Thailand and do their own logistic and cut out the middle which is Thai exporter. (I1Q9L2) On the good side, Thai Orchid production might improve because of new investment and the higher non-tariff barriers like standard control which will allow farmers to produce better quality orchid and have less damage.(I1Q9L3)

8. How would you rate the benefit of the EU-Thailand FTA toward Thai Orchid exporters on the scale 1 to 10 (1 is not benefit and 10 most benefit) and why?

   I give 7 points because the EU-Thailand might help increase sale volume and improve overall standard of Thai orchid.(I1Q10L1)But we should wait and see the EU economic crisis and consider that EU-ASEAN might be the better alternative from Thai orchid export. (I1Q10L2)

Part 4: Future of Thai Orchids export

9. Should the government support Thai Orchids exporters? If yes, how?

   Yes, the government should support Thai orchid exporters because they still a lot of opportunities in the EU market. (I1Q11L1) But the problem is Thai orchid cannot meet EU's standard.(I1Q11L2)

   The government can do is set up cooperative or community state enterprises of Thai orchid exporters and Thai orchid producers.(I1Q11L3)

Then, the government can provide fund to set up a group and influence them to work together in order to improve productivity and share their group opinion to the government.(I1Q11L4)

10. **What Thai government should do in order to promote and educate Thai Orchid exporter about FTA?**

Ministry of Agriculture and Cooperatives with other government sectors can arrange a program 'Training for Trainer' or 'Tell how to' in order to educate and prepare the exporters for the EU-Thailand FTA or another possibly by using local people who can understand area. (I1Q12L1) Also that program can be used to help improve production and export to meet international standard.(I1Q12L2) For example, they are numerous of Thai orchid exporters in Bangkok and Nakhonpathom. (I1Q12L3) The government can use people from local to go to exporter and achieve the plan.(I1Q12L4) Also using the local people might help keep this plan going and become long term plan.(I1Q12L5)

Interview No.2: Specialist No.2

Part1: Information about respondent

1. What is your position in this organization?
   Director of Division of promote vegetable, flower and herd production extension(I2Q2L1)
2. What is your responsibility in (or knowledge about) the EU-Thailand FTA negotiation?
   Working on promoting orchid production, standard and export also participle in EU-Thailand FTA negotiation at Ministry of agriculture and Cooperatives (I2Q3L1)

Part 2: General information about Thai Orchids

3. What is advantage of Thai Orchid exporter over competitors?
   The uniqueness of Thai orchid cannot be found in any place else because Thai orchid is a tropical flower that have many colors and species.(I2Q5L1)Thailand has a perfect location and climate for planting orchid. (I2Q5L2)They are other countries that can plant orchid but it is a polar orchid. (I2Q5L3)Another advantage is the price of orchid that cheaper than orchid from polar countries such as The Netherlands or Taiwan.(I2Q5L4) Also Thai orchid can last very long and can stay the sunlight.(I2Q5L5)
4. What are the obstacles for Thai Orchid exporters to export to the EU market?
   The barriers (regulation on plant health) are main obstacle for exporting Thai orchid because Thai orchid has problem in keeping stable quality for all Thai orchid. (I2Q6L1)Also Thai orchid lack of investment and develop based on two reasons, first, most of producers is small farmers that don't have capital in improve production or planting area. (I2Q6L2)It leads to second reason orchid from Thailand received strict custom's inspection which is time consuming and its effect trade flow of Thai orchid exporters.(I2Q6L3)
5. Do you support the EU-Thailand FTA negotiation? Why or why not?
   Yes, I support EU-Thailand FTA if it focus on orchid only and doesn't include other industry. (I2Q7L1)I support it because I believe flower from the EU cannot build market in Thailand because of its price. (I2Q7L2)Second, the FTA will help increase trade flow and sales volume which is good for Thai

orchid exporters.(I2Q7L3)Finally, the price of Thai orchid will increase if the Thai orchid develops its standard to meet EU requirement.(I2Q7L4)

6. What do you expect the scope of the EU-Thailand FTA eventually to be?

   All current barriers had been negotiated to remove or reduce and give privilege to Thai orchid exporters.(I2Q8L1) For example, Thai orchid export can export orchid to the EU with less custom inspection. (I2Q8L2)

Part 3: The impact of the EU-Thailand FTA

7. What will be the result of the EU-Thailand FTA that can affect Thai Orchid exporters? Is it good or bad for Thai Orchid industry?

   I believe the EU-Thailand will create a good impact toward Thai orchid exporters because Thai exporters will gain more access to the EU market with less restriction.(I2Q9L1) Also the EU's flower cannot harm Thai orchid industry because its price is too high and has less species.(I2Q9L2)

8. How would you rate the benefit of the EU-Thailand FTA toward Thai Orchid exporters on the scale 1 to 10 (1 is not benefit and 10 most benefit) and why?

   I give it a 10. EU-Thailand will give a huge benefit and advantage for Thai orchid exporters over other countries like mention above. (I2Q10L1)I think it can be one way benefit that only Thai orchid exporters that gain from agreement and EU flower exporters will gain nothing.(I2Q10L2)

   But I want the government to look at upcoming competitor like China that plant polar orchid and cheaper which can flow to Thailand.(I2Q10L3)

Part 4: Future of Thai Orchids export

9. Should the government support Thai Orchids exporters? If yes, how?

   Yes. It has a Thai Orchid Export Association that has around 30 members.(I2Q11L1) The government should get in contact with them and support them to invite other Thai orchid exporters to be member.(I2Q11L2) They can give their opinion as a group and it will be easier for government one group than 100 individual.(I2Q11L3) Also the member of the association is an exporter that can understand the need of other exporter and pass on government's idea or plan, it's like they speak the same language. (I2Q11L4)

10. What Thai government should do in order to promote and educate Thai Orchid exporter about FTA?

The key is try to make exporters understand basic information about FTA move the way up to the positive and negative of FTA, then, tell them what they might gain from EU-Thailand FTA.**(I2Q12L1)** The way to provide information about EU-Thailand FTA is through association or public data base like government site that can reach large group of people and people can access information. **(I2Q12L2)**

Interview No.3: Government officer No.1

Part1: Information about respondent

1. What is your position in this organization?

   Working in Division of Economic Relations, Department of International Economic Affairs (I3Q1L1)

2. What is your responsibility in (or knowledge about) the EU-Thailand FTA negotiation?

   Analyze FTA in aspect of economic and former negotiator (I3Q2L1)

Part 2: General information about Thai Orchids

3. What is advantage of Thai Orchid exporter over competitors?

   The advantage of Thai orchid at the moment is GSP but I not sure about its competitors. If they have GSP then Thai exporters will face challenge. (I3Q3L1)

4. What are the obstacles for Thai Orchid exporters to export to the EU market?

   The EU's regulation that related with orchid such as Sanitary and Phytosanitary regulation (SPS) is the biggest obstacle for exporters.(I3Q4L1) Also the labor cost in Thailand is increased or called as "labor intensive" can increase cost of production and lose competitiveness to the competitors. (I3Q4L2)

5. Do you support the EU-Thailand FTA negotiation? Why or why not?

   Yes, if it will benefit Thai orchid export industry. (I3Q5L1)

6. What do you expect the scope of the EU-Thailand FTA eventually to be?

   We will lose benefit in some area to gain in other area. (I3Q6L1) For the Thai orchid exporters, I think if we have MRA for Thai orchid it will help exporter a lot in trade. (I3Q6L2)But it the long term EU-Thailand will give benefit to Thai orchid industry because we will have privilege over countries that don't have FTA with the EU.(I3Q6L3)

Part 3: The impact of the EU-Thailand FTA

7. What will be the result of the EU-Thailand FTA that can affect Thai Orchid exporters? Is it good or bad for Thai Orchid industry?

   In the negotiation we have to lose some to get some,(I3Q7L1) in my opinion orchid is not main export product like automobile. (I3Q7L2)Because of that reason I believe Thai orchid will receive benefit from EU-Thailand FTA.(I3Q7L3)

8. **How would you rate the benefit of the EU-Thailand FTA toward Thai Orchid exporters on the scale 1 to 10 (1 is not benefit and 10 most benefit) and why?**

    If focus on Thai orchid only, the exporters will give 10 points for EU-Thailand FTA.(I3Q8L1)But for me I would give its a 5 because if we focus on Thai orchid exporters only, then, other agriculture product might lose.(I3Q8L2) They are more important agriculture product that should be concern in negotiation.(I3Q8L3) Also Thai orchid have strong position in the EU so FTA might not give that must of benefit as expected.(I3Q8L4)

Part 4: Future of Thai Orchids export

9. **Should the government support Thai Orchids exporters? If yes, how?**

    Of course, the government should support Thai orchid exporters by negotiating with extreme care and concern. (I3Q9L1)Also they are doing a survey on Thai orchid exports' need, problem and expectation from FTA. (I3Q9L2)

10. **What Thai government should do in order to promote and educate Thai Orchid exporter about FTA?**

    Ministry of commerce is directly responsible for this subject, they have a budget for PR. (I3Q10L1) they already put information about their activities like EU-Thailand FTA negotiation process on the ministry's website. (I3Q10L2)Also before draft framework for negotiation they all way have to do the survey with every industry in order to know the need of everyone and it is protocol that must be done before drafting.(I3Q10L3)

Interview No. 4: Government officer No.2

Part1: Information about respondent

1. What is your position in this organization?
   Diplomat officer (I4Q1L1)
2. What is your responsibility in (or knowledge about) the EU-Thailand FTA negotiation?
   Negotiation support team (I4Q2L1)

Part 2: General information about Thai Orchids

3. What is advantage of Thai Orchid exporter over competitors?
   I don't know much about orchid but if talk about agriculture product in general (I4Q3L1) I can say Thailand have high quality agriculture products.(I4Q3L2)
4. What are the obstacles for Thai Orchid exporters to export to the EU market?
   I believe the obstacles of Thai orchid exporters are same as or similar to other industry such as ROO, SPS, and TBT (*Technical barriers to trade*)(I4Q4L1)
5. Do you support the EU-Thailand FTA negotiation? Why or why not?
   Yes, Thailand will lose GSP all together in two years so FTA can come to replace it. (I4Q5L1)Second reason, they are other countries that is main competitors of Thai orchid if they get FTA before us Thai orchid exporters will face trouble.(I4Q5L2) Also if Thailand showed commitment to negotiation it can bring confidence to investors to invest in Thailand. (I4Q5L3)
6. What do you expect the scope of the EU-Thailand FTA eventually to be?
   It will benefit Thai orchid exporters for sure. (I4Q6L1) However, the EU wants to have FTA with ASAEN more than bilateral but the EU knew it impossible. (I4Q6L2) So they begin negotiation FTA bilaterally and at the end when EU starting to negotiate FTA with ASAEN again Thailand will more benefit than other countries.(I4Q6L3)

Part 3: The impact of the EU-Thailand FTA

7. What will be the result of the EU-Thailand FTA that can affect Thai Orchid exporters? Is it good or bad for Thai Orchid industry?

I think Thai orchid exporters will get benefit from EU-Thailand FTA. (I4Q7L1) But if Thai government doesn't move fast on this matter and some countries cut through first it will be bad for Thailand.(I4Q7L2)

8. **How would you rate the benefit of the EU-Thailand FTA toward Thai Orchid exporters on the scale 1 to 10 (1 is not benefit and 10 most benefit) and why?**

   In my personal opinion I gave it a 10 because FTA negotiation is a long process.(I4Q8L1) If Thailand starts negotiation as soon as possible not only it can replace GSP but also give competitiveness over competitor such as Vietnam. (I4Q8L2)

Part 4: Future of Thai Orchids export

9. **Should the government support Thai Orchids exporters? If yes, how?**

   Yes. Thai government must support every industry same as Ministry of Commerce that have to look over all trade both domestic and international. (I4Q9L1) The Ministry of Commerce will support by give all information about exporting to the EU to exporters.(I4Q9L2) If it is about production of orchid, Ministry of Agriculture is responsible to support.(I4Q9L3)

10. **What Thai government should do in order to promote and educate Thai Orchid exporter about FTA?**

    The Ministry of Commerce already set up many websites to provide information about FTA and EU-Thailand FTA such as www.dtn.go.th (Department of Trade Negotiation's website), www.thaifta.com (provide all information about FTA and Thailand FTA with every countries), and www.moc.go.th (Ministry of Commerce's website). (I4Q10L1) The government also arranges a press conference and seminar to inform information and process of all FTA including EU-Thailand FTA.(I4Q10L2)

Interview No.5: Specialist No.3

Part1: Information about respondent

1. What is your position in this organization?
   Logistic Department (I5Q1L1)
2. What is your responsibility in (or knowledge about) the EU-Thailand FTA negotiation?
   Working on cut flower's production and market (I5Q2L1)

Part 2: General information about Thai Orchids

3. What is advantage of Thai Orchid exporter over competitors?
   The wealth of Thailand is suitable for planting orchid. (I5Q3L1) Also Thai orchid exportershas opportunity, capability and ready to export orchid to the EU more than competitors.(I5Q3L2)Also Thai orchid is uniqueness, beautiful and better in term of price when compare with competitors.(I5Q3L3)
4. What are the obstacles for Thai Orchid exporters to export to the EU market?
   The small orchid famers cannot always provide quality orchid to exporters. (I5Q5L1) Also the EU's regulation related to quality of orchid and plant diseases such as SPS.(I5Q4L2)
5. Do you support the EU-Thailand FTA negotiation? Why or why not?
   Yes, I think EU-Thailand FTA provides benefit to Thai orchid and also other agriculture products. (I5Q5L1)Because FTA can provide benefit to Thai exporters in term of tariff elimination, remove non-tariff barriers such as standard regulations. Thai orchid has problem with quality control. (I5Q5L2)
6. What do you expect the scope of the EU-Thailand FTA eventually to be?
   The scope of FTA should focus on tariff reduction and non-tariff barriers that benefit Thai exporters such as ROO.(I5Q6L1)

Part 3: The impact of the EU-Thailand FTA

7. What will be the result of the EU-Thailand FTA that can affect Thai Orchid exporters? Is it good or bad for Thai Orchid industry?
   The result EU-Thailand FTA will be good for Thai orchid exporters. (I5Q7L1) First, I expected the reduction of tariff.(I5Q7L2) Second, I believe

Thai government will negotiate non-tariff barriers for exporters' benefit. (I5Q7L3)

8. How would you rate the benefit of the EU-Thailand FTA toward Thai Orchid exporters on the scale 1 to 10 (1 is not benefit and 10 most benefit) and why?

   In my personal opinion I think EU-Thailand FTA will give benefit to Thai orchid exporters for sure.(I5Q8L1) Because orchid is a time sensitive product so only small change on custom regulation that helps speech up export process will give benefit to exporters.(I5Q8L2)

Part 4: Future of Thai Orchids export

9. Should the government support Thai Orchids exporters? If yes, how?

   Yes, because Thai orchid exporters have problems such as regulation related to plant diseases and quality also the production facility. (I5Q9L1)The Thai government should cooperate with Thai orchid exporters for inside knowledge of exporters to gain understand about problems and find solution that work for both Thai government and exporters (I5Q9L2) For example, the input of Thai orchid exporters can tell which direction of FTA negotiation will provide benefit to exporters. (I5Q9L3)

10. What Thai government should do in order to promote and educate Thai Orchid exporter about FTA?

The Thai government can launch trade show to help promote Thai orchid.(I5Q10L1) Also the government can rise up the standard by doing the price guarantee with condition of orchid quality.(I5Q10L2)

VITA

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