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THAI FRUIT PACKING HOUSES: OPPORTUNITIES AND CHALLENGES

A FEASIBILITY STUDY ON USING PROFESSIONAL CERTIFICATION FOR RECRUITMENT OF NON-CIVIL SERVANT PERSONNEL IN GOVERNMENT AGENCIES

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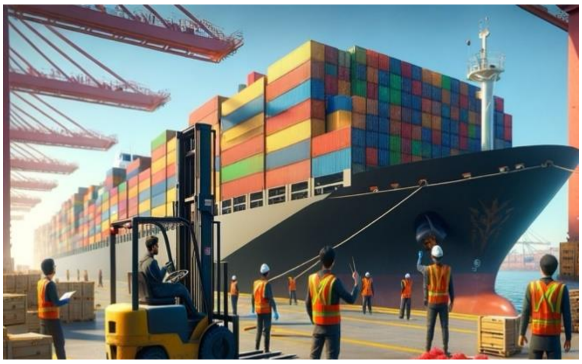
THAI FRUIT PACKING HOUSES: OPPORTUNITIES AND CHALLENGES*

Khanitha Pakinamhang[**]

ABSTRACT

Thai fruit packing houses, or "Lhong," play an essential role in the agricultural supply chain, serving as key intermediaries for fruit purchasing, grading, packaging, and export. However, these businesses are facing competitive challenges due to the entry of foreign fruit packing houses across various activities within the fruit export supply chain, which dominate the export market and influence the pricing dynamics, particularly in the Chinese market. This study explores the opportunities and challenges faced by Thai fruit packing houses amidst this competitive landscape. It examines the sector's strengths, such as strong local market knowledge and established farmer relationships, as well as weaknesses, including limited access to technology and capital. Additionally, the study assesses the impacts of foreign fruit packing houses investments, highlighting both the economic benefits and risk of market monopolization. Policy recommendations focus on market diversification, regulatory enforcement, financial support and capacity-building initiatives to enhance the competitiveness and sustainability of Thai packing houses. These measures aim to secure the long-term benefits for the fruit export sector, Thai fruit packing houses and its farmers.

Keywords: Thai fruit packing house, foreign fruit packing house, Thai fruit export, Thai fruit businesses



1. THE IMPORTANCE OF THAI FRUIT IN THE CHINESE MARKET

Although Thailand's agricultural sector comprises only 8.6% of the GDP, it plays a critical role in driving the economy and supplying raw materials for the food industry. Agricultural exports contribute significantly to national revenue, especially during the period from 2019 to 2023, the average annual value of agricultural exports was $44,797.21 million USD (1,463.544 billion THB).

In 2023, Thailand's fresh fruit exports reached a value of $5,401.2 million USD (151.587 billion THB), representing a 22.3% growth compared to the previous year. China was the largest export market, accounting for 91.1% of the total export value of Thai fresh fruit. The key fresh fruit exports from Thailand included:

1) **Fresh Durian:** Export value of $4,124.9 million USD (141.055 billion THB), a growth of 28.1% over the previous year. Of this, 97.5% was exported to China.
2) **Fresh Mangosteen:** Export value of $502.2 million USD (17.192 billion THB), a growth of 25.6% over the previous year. Of this, 93.7% was exported to China.
3) **Fresh Longan:** Export value of $474.2 million USD (16.492 billion THB), a decrease of 3.5% compared to the previous year. Of this, 78.0% was exported to China.

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[*] This article is a part of the project on Ways and Means to Enhance Capability and Competitiveness in Agribusiness: Fruit Packing House.

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4) **Aromatic Coconut:** Export value of $288.2 million USD (9.889 billion THB), an increase of 2.9% over the previous year. Of this, 85.7% was exported to China.

2. SITUATION AND TREND OF THAI FRUITS

2.1 Major Production Areas for Thai Fruit Exports

Thai fruit export production is concentrated in specific regions due to favorable geography and climate:

Durian: Commonly cultivated in eastern and southern Thailand.

- Eastern provinces: Chanthaburi and Rayong. The harvest season is from March to June.
- Southern provinces: Chumphon, Surat Thani, Yala, and Nakhon Si Thammarat. The harvest season is from July to August.
- Popular varieties are "Mon Thong," followed by "Chanee," "Kradumthong," and "Kan Yao."

Mangosteen: commonly grown in eastern and southern provinces.

- Eastern provinces: Chanthaburi, Trat, and Rayong.
- Southern provinces: Chumphon, Nakhon Si Thammarat, and Narathiwat.

Longan: Primarily grown in northern and eastern provinces.

- Northern provinces: Chiang Mai, Lamphun, Chiang Rai, Phayao, Lampang, Phrae, Tak, and Nan. Nearly all production is seasonal, with harvests from June to September, with the peak in August. Off-season longan is produced using potassium chlorate, available from November to March but in limited quantities.
- Eastern provinces: Chanthaburi and Sa Kaeo. Production is primarily off-season, with harvests from October to May.

Aromatic Coconut: Can be grown in various regions, with major growing provinces including Ratchaburi, Samut Sakhon, Nakhon Pathom, Prachuap Khiri Khan, Samut Songkhram, Songkhla, and Chachoengsao. (Figure 1)

2.2 Thai Fruit Export Production Volume

In 2023, Durian production in Thailand reached the highest volume at 1.47 million tons, followed by longan at 1.41 million tons, aromatic coconut at 640,000 tons, and mangosteen at 270,000 tons.

Over the past decade (2014–2023), durian production in Thailand has steadily increased, while mangosteen production has remained relatively stable without significant changes. Longan production has also increased but fluctuated periodically and aromatic coconut production has seen growth, especially over the past 4–5 years. (Figure 2)

2.3 Prices Received by Farmers

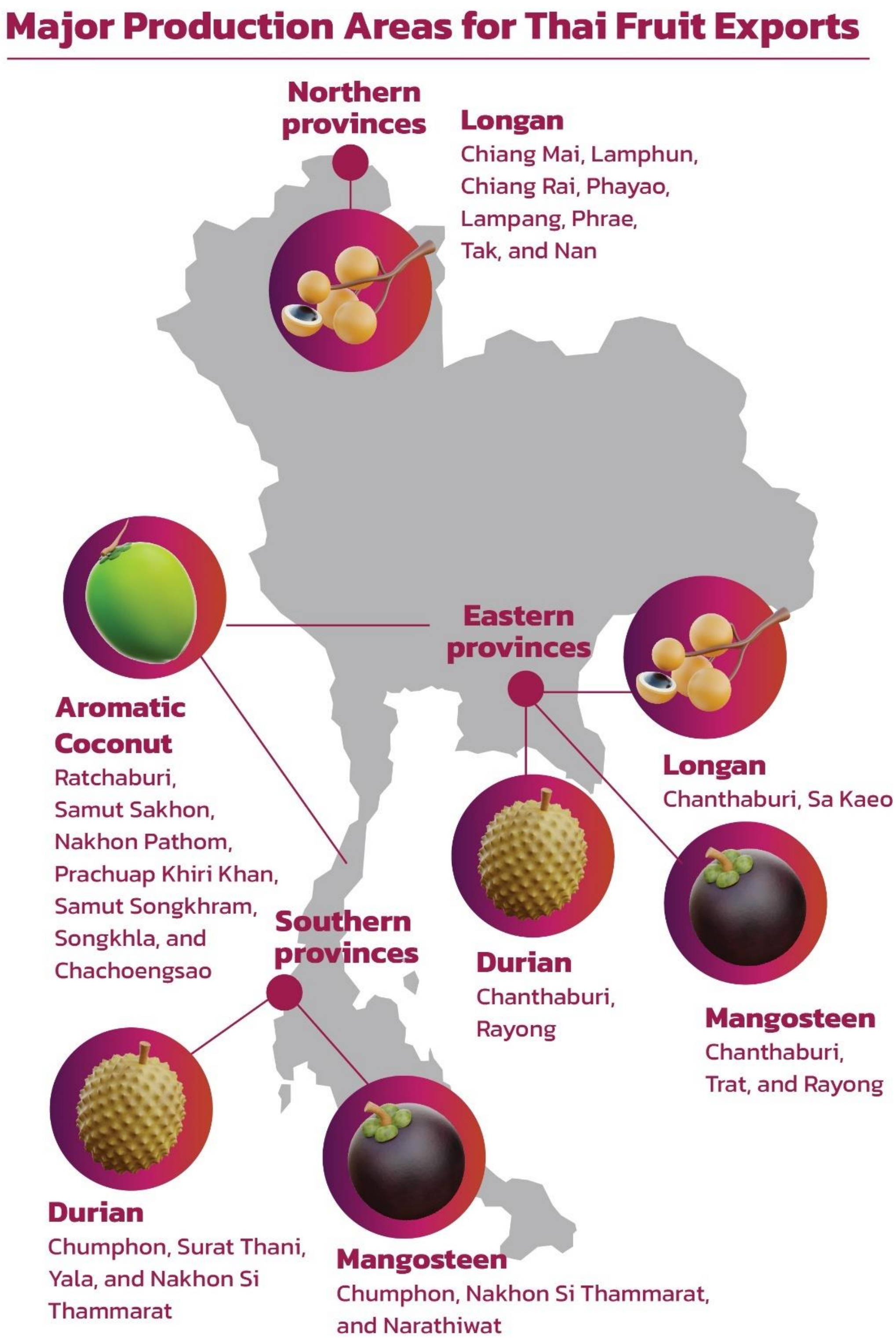
Durian: The price received by farmers for durian have increased due to high export demand, particularly in China.

Mangosteen: The price received by farmers for fresh mangosteen has been quite volatile, largely dependent on the fluctuating production volume and sensitivity to climatic conditions, which impacts fruit quality.

Longan: Prices declined between 2017 and 2022 due to decreasing Chinese demand and oversupply, but increased in 2023, the prices increased due to growing demand from China and ASEAN markets, such as Indonesia, Malaysia, and Vietnam.

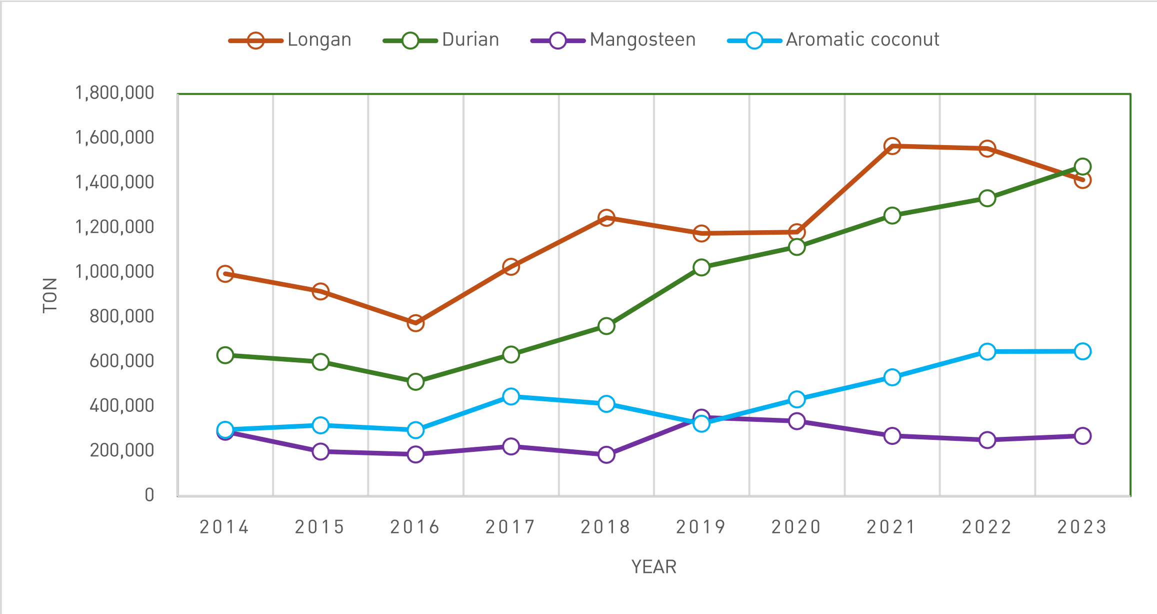
Aromatic Coconut: Prices are quite volatile, largely dependent on the fluctuating production volume. (Figure 3)

Figure 1
Major Production Areas for Thai Fruit Exports



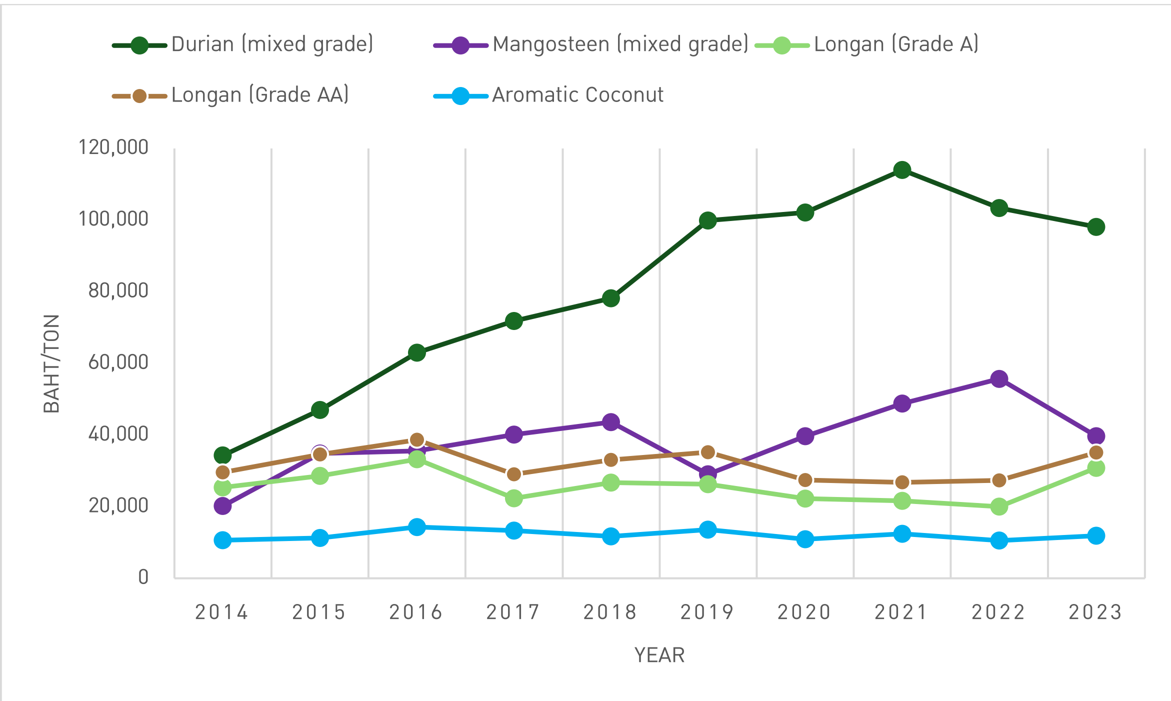
Note. Agricultural Economic Data by Commodity, Office of Agricultural Economics, 2023.

Figure 2
Thai Fruit Export Production Volume Classified by Fruit Type, 2014–2023



Note. Agricultural Economic Data by Commodity, Office of Agricultural Economics, 2023. Agricultural Production Information System, Department of Agricultural Extension, Ministry of Agriculture and Cooperatives, 2024.

Figure 3
Prices Received by Farmers Classified by Fruit Type, 2014–2023



Note. Agricultural Economic Data by Commodity, Office of Agricultural Economics, 2023.

2.4 Export Trends of Key Thai Fruits

Thailand exports fresh durians the most, followed by fresh longans, aromatic coconuts, mangosteens, and dried longans respectively. Over the past decade (2014 – 2023), the export trends for key Thai fruits have varied:

Durian: Steady growth in both volume and value, driven by increasing demand, particularly in China.

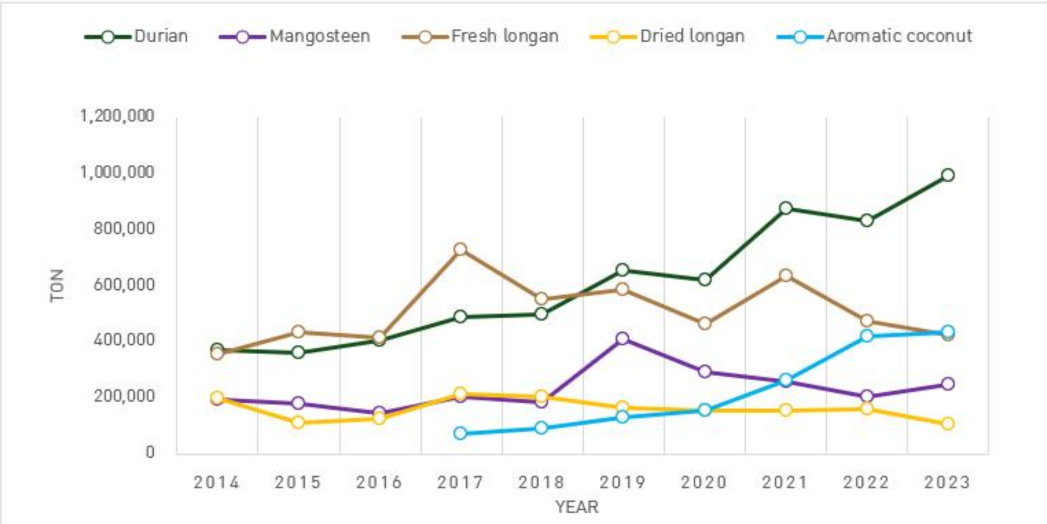
Mangosteen: Exports are subject to volatility based on harvest yields and market preferences.

Longan (both fresh and dried): Like mangosteen, export volumes and values have fluctuated significantly, influenced by production levels and market demand.

Aromatic Coconut: Both export volume and value have steadily increased, reflecting growing interest in this niche product. (Figure 4–5)

Figure 4

Thai Fruit Export Volume Classified by Fruit Type, 2014–2023

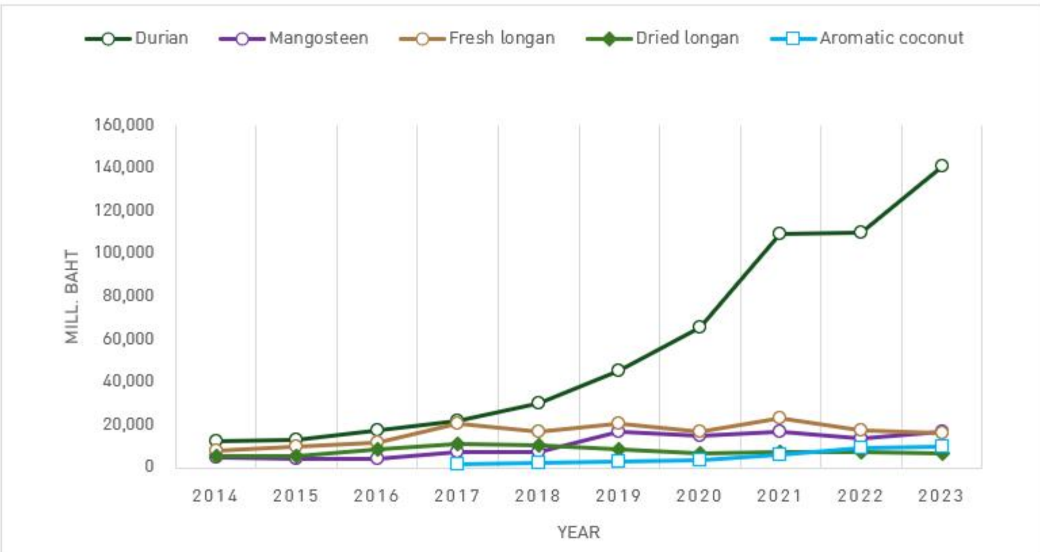


Note. Agricultural Economic Data by Commodity, Office of Agricultural Economics, 2023.

Conversion rate: 3.3 kg of fresh longan = 1 kg of dried longan with shell.

Figure 5

Thai Fruit Export Value Classified by Fruit Type, 2014–2023



Note. Agricultural Economic Data by Commodity, Office of Agricultural Economics, 2023.

Conversion rate: 3.3 kg of fresh longan = 1 kg of dried longan with shell.

2.5 Key Export Markets

China is the main export market for Thai fresh fruits, dominating the export statistics. The breakdown of key markets by fruit type are as follows:

Durian: China, Hong Kong, Malaysia, Taiwan, and the United States.

Mangosteen: China, Vietnam, Hong Kong, South Korea, and the United States.

Fresh Longan: China, Indonesia, Hong Kong, Malaysia, and Vietnam.

Dried Longan: China, Vietnam, Hong Kong, Malaysia, and Singapore.

Aromatic Coconut: China, the United States, Hong Kong, Singapore, and the United Arab Emirates.

2.6 Key Competitors in the Chinese Market

Thailand faces stiff competitors in the Chinese fruit export market from other ASEAN countries, including Vietnam, Cambodia, Malaysia, and Indonesia. Among these, Vietnam is the most significant competitor for fresh fruit exports. The main competitors by fruit type are as follows:

- **Durian:** Vietnam and Malaysia
- **Mangosteen:** Vietnam and Indonesia
- **Longan:** Vietnam and Cambodia
- **Aromatic Coconut:** Vietnam and Indonesia

2.7 Challenges for Thai Fruit Exports

The challenges for Thai fruit exports are price sensitivity, the Chinese market is price-sensitive, and Thailand often competes on quality rather than cost. Then logistical costs, transportation and storage are critical to maintaining fruit quality but add to overall costs and the last one is standards and regulations, compliance with Chinese import regulations, including Good Manufacturing Practices (GMP) and Good Agricultural Practices (GAP), is mandatory.

3. THE ROLE AND TRENDS OF FRUIT PACKING HOUSES IN THAILAND

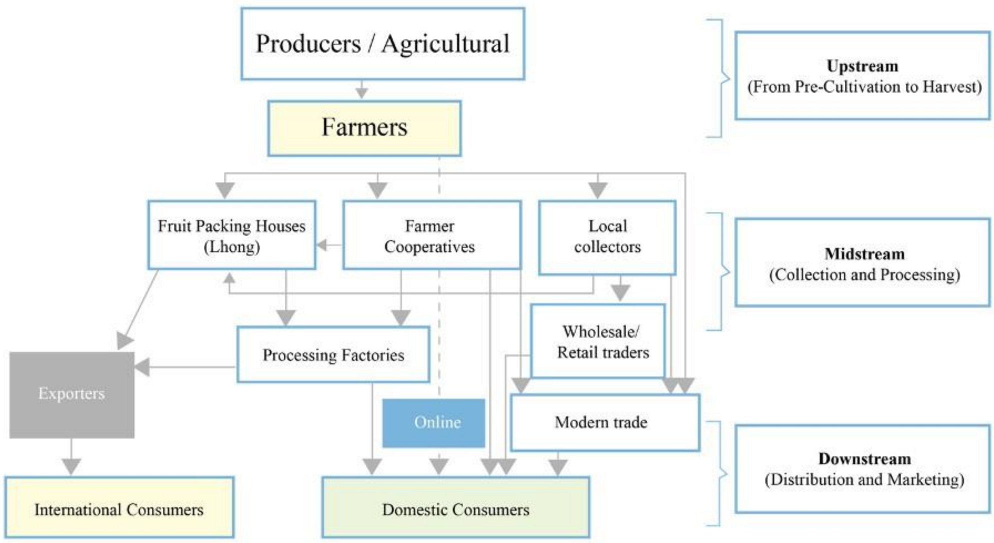
3.1 Fruit Packing Houses in the Thai Fruit Supply Chain

A fruit packing house, known as "Lhong" in Thailand, is a business entity that serve as intermediaries in the supply chain, purchasing fruits from farmers, collecting, grading and packaging them for domestic distribution or export.

The Thai fruit supply chain includes upstream, midstream and downstream processes as the following. (Figure 6)

Figure 6

Thai Fruit Supply Chain



Note. Adapted from the Office of Agricultural Economics (2020) and based on field data collection and interviews (2024).

- Upstream are agricultural input suppliers and farmers.
- Midstream are local collectors, farmer cooperatives, fruit packing houses, and processing factories.
- Downstream are wholesale/retail traders, modern trade, exporters, and consumers both domestic and international.

Fruit packaging houses are key players in Thai fruit supply chain. Countries importing Thai fresh fruits, especially China, often require the following:

1) Fresh fruit must originate from farms and fruit packing houses officially registered with the Thai Department of Agriculture and listed on the General Administration of Customs of the People's Republic of China (GACC) website.
2) The packing house must adhere to Good Manufacturing Practice (GMP).
3) Fresh fruit must come from farms certified in Good Agricultural Practices (GAP).

The Asean-China Free Trade Agreement (ACFTA), which entered into force on October 1, 2003, reduced tariffs on fruits and vegetables traded among members countries to zero percent. This led to a significant increase in fruit and vegetables trade between Thailand and China. Starting in 2010, Thai fruit packing houses began establishing collection and procurement point in cultivation areas for both domestic sales and exports.

As the Thai fruit market expanded—especially in China, Thailand's largest fruit export market foreign-owned packing houses have started entering the fruit packing house industry to directly export to China.

Key export fruits such as durian, mangosteen, longan and aromatic coconut recently becoming highly sought after in the Chinese market. This growing demand has driven a steady increase in the presence of foreign fruit packing houses in Thailand, granting them significant influence throughout the Thai fruit export supply chain.

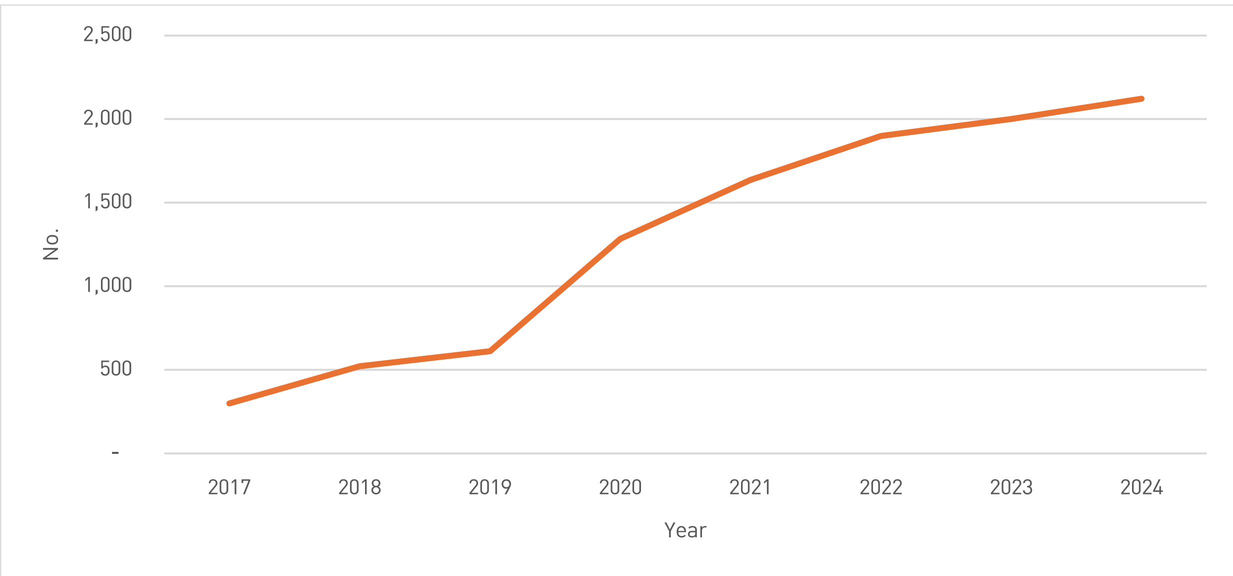
3.2 Number and Distribution of Fruit Packing Houses in Thailand

3.2.1 Registered Fruit Packing Houses in Thailand

The number of packing houses has grown steadily since 2017, particularly after 2019. As of May 28, 2024, there were 2,122 packing houses registered with the Department of Agriculture for exporting to China. (Figure 7)

Figure 7

Total Number of Fruit Packing Houses Registered with the Department of Agriculture for Exporting to China, 2017–2024



Note. The Department of Agriculture, 2024.

3.2.2 Geographical Distribution

Fruit packing houses are located throughout the country but are concentrated in major fruit-growing regions, with the central region (including the eastern and western regions) having the highest number at 1,252 packing houses, followed by the south with 647 packing houses, the north with 197 packing houses, and the northeast with 26 packing houses. (Figure 8)

3.2.3 Ownership and Market Share of Fruit Packing Houses in Thailand

Ownership structures of fruit packing house in Thailand, classified by nationality, can be divided into three main categories based on the share of investment:

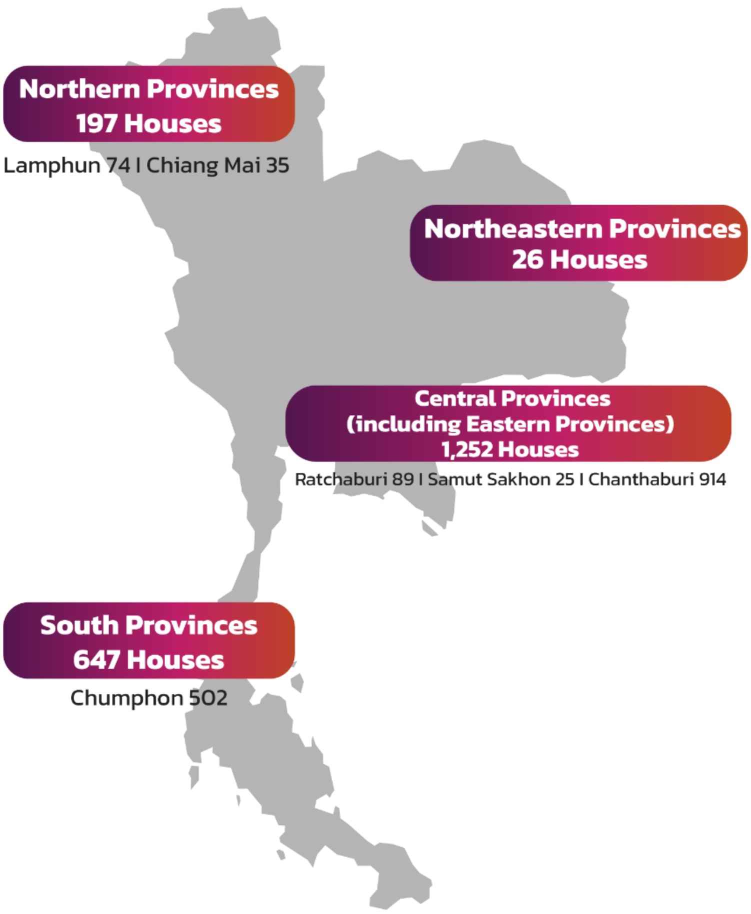
1) Fully Thai-owned companies.
2) Joint venture with majority Thai ownership.
3) Joint ventures with majority foreign ownership.

In 2024, fully Thai-owned companies represent the largest share at 68% of all packing house businesses in Thailand. Next are joint ventures with majority Thai ownership making up 29%. Meanwhile, those joint ventures with majority foreign ownership make up only 3%. (Figure 9)

Foreign packing houses show a significantly higher capital investment compared to Thai-owned packing houses, indicating a substantial inflow of foreign capital into Thailand's fruit packing business. Thai-owned packing houses, on the hand, tend to be small operations. (Figure 10)

There are a small number of foreign packing houses, but they account for a large share of total revenue due to their larger business scale. This highlights the growing influence of Chinese investment in Thailand's fruit market. (Figure 11)

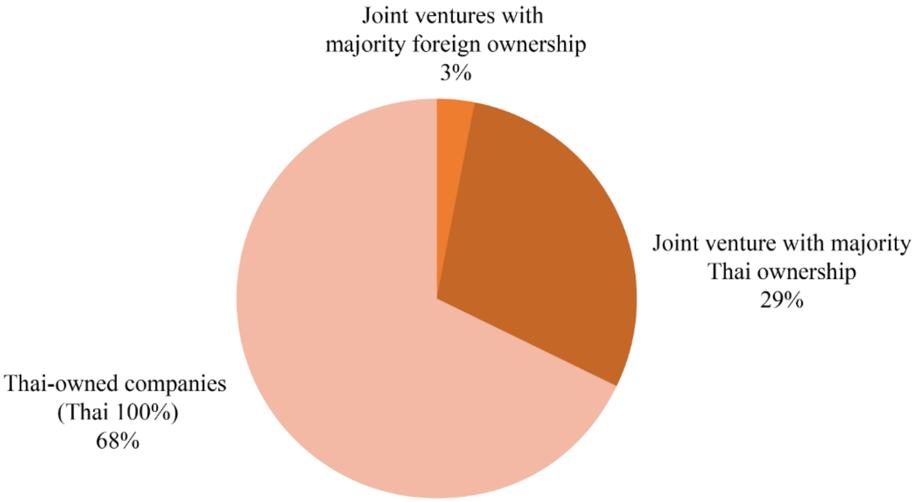
Figure 8
Distribution of Fruit Packing Houses by Region



Note. The Department of Agriculture, 2024.

Figure 9

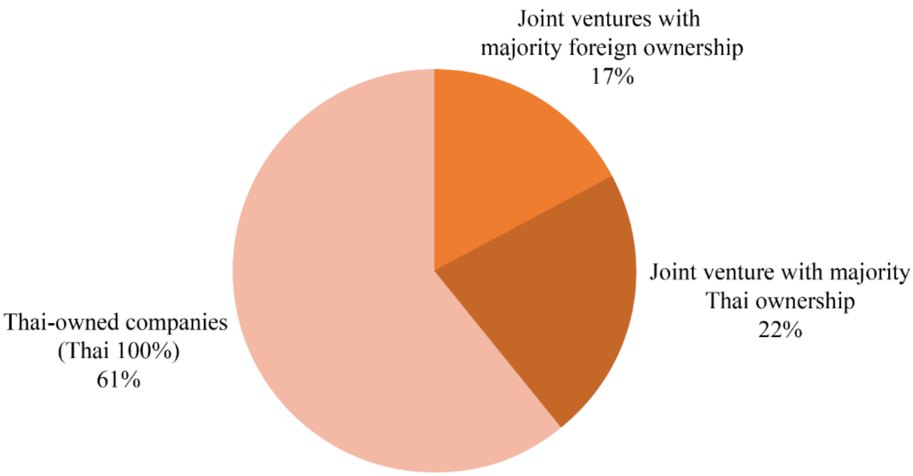
Number of Fruit Packing Houses in Thailand, Classified by Nationality



Note. The Department of Agriculture and Department of Business Development; authors' calculation.

Figure 10

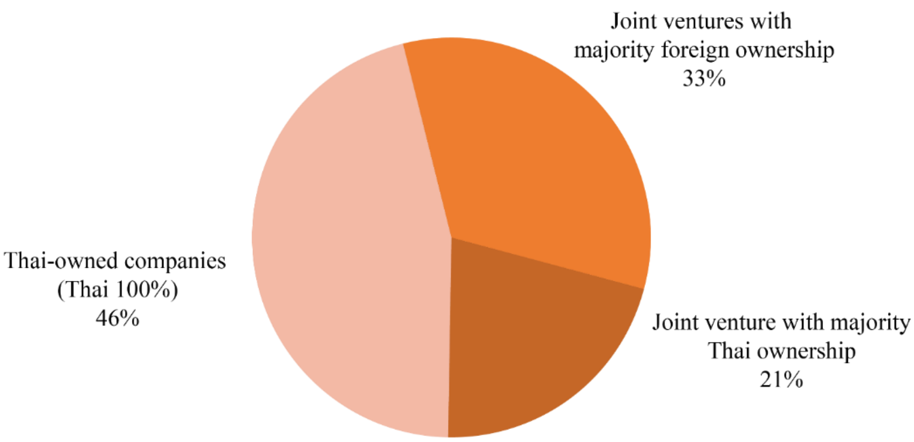
Registered Capital of Fruit Packing House Business in Thailand, Classified by Nationality



Note. The Department of Agriculture and Department of Business Development; authors' calculation.

Figure 11

Total Revenue of Fruit Packing House Business in Thailand, Classified by Nationality



Note. The Department of Agriculture and Department of Business Development; authors' calculation.

Due to the increasing demand for Thai fruits in the Chinese market, Chinese packing houses are motivated to enter the Thai fruit packing houses businesses. They see an opportunity to act as intermediaries in purchasing Thai fruit for direct distribution to the Chinese market. Chinese packing houses aim to manage and control the packing process themselves, allowing them to precisely regulate the quality standards and production volumes needed for export to China. Additionally, they seek to optimize operations to reduce costs related to transportation and warehouse management, enabling faster and more cost-effective exports. With in-depth knowledge of the Chinese market and access to distribution channels, Chinese packing houses hold a competitive advantage over Thai packing house in terms of exports.

4. FRUIT PROCUREMENT METHODS OF FRUIT PACKING HOUSES

Fruit packing houses in Thailand procure fruit from farmers through various methods:

1. Direct Purchase Points in Growing Areas: Farmers bring their fruit directly to the packing house.
2. Through Local Collectors or Middlemen: The packing house buys fruit through intermediaries located in farming areas.
3. Through Agents: Agents of the packing house negotiate purchases directly with farmers, either by buying entire orchards or specific quantities.
4. Participation in Fruit Auctions: Especially for mangosteen, the packing houses may bid on produce from farmer groups, large-scale farms, or community enterprises.
5. Own Orchards: Some packing houses own their own orchards while also buying additional products from local farmers.

5. BUSINESS MODELS OF FRUIT PACKING HOUSES IN THAILAND

Based on Table 1, Thai and foreign packing houses in Thailand operate under several business models. The details are as follows:

1. Creating Their Own Brand: Typically, this type involves larger packing houses with extensive experience and vertical integration. These businesses often have strict quality control to establish a strong brand reputation. They have partnerships with Chinese distributors to ensure market access. However, their risks involve potential fraud or counterfeiting by partners and operational dependency on specific buyers, though this model is relatively small number.

2. Contract Packaging Services: Common among small to medium-sized packing houses. These packing houses fulfill export orders based on specific client requirements. Their income depends on efficient cost management. There is intense competition, and the risk of order cancellations or shifts to another competitors.
3. Collection and Packaging (Excluding Export): Common among small to medium-sized packing house this group conducts sorting and packing for Thai and Chinese involves handling fruits for other exporters or distributors without taking part in export activities. Income is derived from packing fees, which vary based on effective cost management. This group has high competition, lack of long-term stability are dependent on service orders, and a risk of contract termination by buyers.
4. Freelance Pacing Houses or "Freelance Packing Services": These small to medium-sized packing houses operate on a seasonal basis without fixed clients. They depend on orders from both local and international buyers during harvest seasons. There is a risk of no consistent partnerships and limited work during off-seasons.

6. COMPETITIVENESS OF THAI FRUIT PACKING HOUSES

Enhancing the capabilities and competitiveness of Thai fruit packing houses is essential for their survival and growth in the fruit trading market, particularly when competing against foreign packing houses with high capabilities. An analysis of the strengths and weaknesses of Thai packing houses reveals the following insights:

Table 1
Business Model of Fruit Packing Houses in Thailand

Business Model	Thai Packing House	Foreign Packing House	Activities	Advantages	Disadvantages
Creating Their Own Brand	✓	✓	Purchasing, grading, packing and exporting under their own brand.	High-quality products, loyal customers, stable market demand.	Risk of counterfeiting or fraud by trading partners.
Contract Packaging Services	✓	✓	Packaging fruits per order for buyers (both Thai and foreign).	Stable income from packaging services; minimal market risks.	High competition, risk of order cancellations or shifts to another competitors.
Collection and Packaging	✓		Purchasing, grading, and packaging without direct exporting.	Stable income from service fees; minimal market risks.	High competition, lack of long-term stability; dependent on service orders.
Freelance Packing Service	✓		Purchasing, grading, and packaging without long-term partnerships.	Flexible income based on seasonal demand.	No consistent partnerships, limited work during off-seasons.

Table 2

Comparison of Business Practices Between Thai and Foreign Packing Houses

Factor	Thai Packing Houses	Foreign Packing Houses
Business Size	Small and Medium-sized	Large-scale operations
Target Market	Domestic market and partial exports	Primarily focused on the Chinese market
Production Management	Flexible approach, choosing product types and quantities based on circumstances	Focused on high volume and strict quality standards
Relationship with Farmers	Close relationships with farmers, providing education and support	Emphasis on contracts and demand for large quantities of produce
Technology	Basic and conventional technology	Advanced technology for sorting, preserving quality, and logistics
Employment	Employing local and foreign workers	Employing local and foreign workers

6.1 Strengths of Thai Packing Houses

- **Understanding of the Domestic Market:** Thai packing houses have a solid understanding of both domestic and international consumer demands. This enables them to quickly adapt and supply products that align with market needs. Their close connections with local farmers foster strong relationships, ensuring consistent access to high-quality produce.
- **Operational Flexibility:** Thai packing houses operate with a less complex system compared to foreign competitors, allowing them to adapt to market conditions and consumer preferences more effectively. They can adjust the types and quantities of produce to buy and sell based on current conditions, providing flexibility in business management.
- **Close Relationships with Local Farmers:** Thai packing houses benefit from long-term connections with local farmers, which ensures consistent access to quality produce and enables flexible pricing negotiations. Many Thai packing houses also support farmers by providing advice on cultivation and post-harvest handling to meet market standards.
- **Expertise and Experience:** Thai packing houses have extensive experience in sorting and managing produce and are skillful in domestic logistics, which reduces the risk of damage during short-distance transport during while maintaining product quality.
- **Efficient Use of Resources:** Thai packing houses effectively utilize local resources, such as labor, agricultural areas, and existing technology, resulting in lower operational costs compared to foreign competitors. This cost advantage enhances their price competitiveness.
- **Improving Production Standards:** Many Thai packing houses have started adopting international production standards, such as GAP (Good Agricultural Practices) and GMP (Good Manufacturing Practices), and other export standards. This boosts the credibility and acceptance of their produce in international markets.
- **Expansion into International Markets:** Although Thai packing houses have traditionally focused on the domestic market, many larger Thai operators are now building business networks and partnerships in inter-

national markets, especially in Asia, which diversifies risk and expands market reach.

- **Brand Building and Product Differentiation:** Several Thai packing houses are developing unique brands and marketing strategies to highlight the distinctiveness of Thai fruits, such as longan, durian, mangosteen, and aromatic coconut. This branding effort increases the product's value and differentiates them from foreign competitors, making Thai fruits more appealing in international markets.

In summary, Thai packing houses have competitive strengths due to their knowledge of the local market, strong relationships with farmers, production standard improvements, and adaptability to international markets. However, sustainable growth will require appropriate government support.

6.2 Weaknesses of Thai Packing Houses

- **Limited Access to Advanced Technology:** Some Thai packing houses lack access to modern production and management technologies, putting them at a disadvantage compared to foreign competitors who use advanced technology for sorting and transportation.
- **Insufficient Financial Resources:** Many Thai packing houses face challenges in accessing sufficient funding for business expansion or technology investment, slowing their growth compared to foreign competitors who often receive government support.
- **Challenges in Entering Foreign Markets:** Despite efforts to expand into foreign markets, accessing new markets, especially China, remains difficult and challenging for Thai packing houses due to high competition and the stronger ties that Chinese packing houses have within their own market.
- **Need for Continuous Quality and Standard Improvements:** To maintain consumer trust, Thai packing houses must continually enhance their production processes and quality management systems to meet the rising standards of the global market.

While foreign packing houses are often seen as competitors, many Thai farmers and packing houses view them as partners that enhance market dynamics. Foreign packing houses help farmers achieve better prices and open more sales channels, creating a mutually beneficial relationship. Additionally, foreign packing houses often rely on local intermediaries or Thai packing houses to source produce, reinforcing their collaboration.

7. THE IMPACTS OF FOREIGN PACKING HOUSES ON THAI FRUIT TRADE

The influence of foreign packing houses on Thai fruit trade can be categorized into positive and negative impacts as follows:

7.1 Positive Impacts

Chinese packing house have contributed to the growth of Thailand's agricultural economy by expanding Thai fruit markets into China and increasing farmers' income. The positive effects include:

- **Increased Market Channels for Farmers:** Farmers now have more options for selling their produce without relying solely on local collectors or middleman as they did in the past.
- **Higher Fruit Prices:** The presence of foreign packing houses has driven up fruit prices, enabling farmers to sell at better prices, which positively affects the entire fruit market system.
- **Quality and Standards Improvement:** Foreign packing houses set clear standards for fruit purchases, motivating farmers and local businesses to improve production processes, sorting, and management to meet export standards and consumer demands.

Table 3
Comparison of Strengths and Weaknesses Between Thai and Foreign Packing Houses

Aspect	Thai Packing Houses	Foreign Packing Houses
Networks	Close ties with local farmers ensure consistent access to quality produce.	Have strong networks and in-depth knowledge of the Chines market enabling rapid adaptation to consumer demand.
	Flexible of negotiating prices due to close relationships.	Capable of exporting large volumes of Thai fruits to China.
Technology	Limited access to advanced technologies for production and management.	Efficient transport systems, including cold chain logistics to reduce spoilage during long-distance shipping.
Financial Resources	Insufficient funding for business expansion or technology upgrades.	Sufficient funding for competitive pricing and large-scale procurement.
Adaptability	Quickly adjust to market and consumer demands due to operational simplicity.	Rapidly modifies procurement or production to meet market demands.
Product Standards	Maintains strict export standards, such as food safety and environmental standards, ensuring consumer trust.	Meet stringent Chinese standards, ensuring high-quality exports and consumer confidence.
Market Access	Rely on the Chines market creates risk of the policies or economic conditions change.	Direct access to the target market facilitating streamlined operations.
	Faces challenges in entering new foreign markets due to high competition.	
Competition	Requires continuous improvement in quality management to maintain competitiveness.	Faces competition from Thai and international operators but leverages its advanced systems and networks.

- **Expanded Market Access via China:** The growing demand in China's large fruit market has led to the establishment of packing houses for various fruits, starting with durian, mangosteen, longan, and recently aromatic coconut. Foreign packing houses streamline the linkage of Thai fruits to the Chinese market, increasing global awareness of Thai fruits.
- **Enhanced Export Capabilities:** Foreign packing houses expand Thai fruit exports to international markets, particularly China, by leveraging efficient logistics systems. Their advanced transportation management ensures quicker and safer delivery of Thai fruits to foreign markets, reducing spoilage during transit.
- **Economic Activity and job Creation:** The establishment of foreign packing houses in agricultural areas generates economic activity and creates jobs in sorting, packaging, and transportation, spreading income within local communities.
- **Support for Labor-Intensive Harvests:** The bulk-purchase model addresses labor short-ages during harvest seasons, especially as the farming population ages. This approach provides farmers with certainty of market demand and financial support through upfront payments, enabling investment in orchard maintenance.

In Summary, foreign packing houses play a significant role in promoting Thailand's agricultural economy by expanding market access and increasing farmers' incomes.

7.2 Negative Impacts

Despite these benefits, the growing presence of foreign packing houses poses some risks:

- **Dependence on a Single Market:** The Thai fruit market is heavily dependent on foreign packing houses and Chinese market. If Chinese demand decreases or import are halted, Thai farmers may suffer due to a lack of alternative markets.
- **Price Control by Foreign Packing Houses:** Foreign packing houses hold substantial purchasing power, often setting prices and terms that leave Thai farmers with little bargaining leverage. Thai farmers may face unfair compensation for quality produce if purchase prices are kept low. Overdependence on China increases risks, as seen with longan, where reduced Chinese demand led to significant market challenges.
- **Focus on Quantity over Quality:** Some foreign packing houses prioritize volume over fruit quality, prompting farmers to accelerate production without adhering to standards. This can harm the reputation of Thai fruits in global markets, such as issues with exporting under-ripe durians.
- **Loss of Market Share for Thai Packing Houses:** Many Thai packing houses are relegated to acting as subcontractors for packaging rather than direct exporters. The competition from foreign packing houses further diminishes their market share and profit margins.
- **Challenges in Accessing the Chinese Market:** Thai packing houses face challenges in directly accessing the Chinese market due to language barriers and reliance on Chinese networks and partnerships. Additionally, stringent Chinese import regulations limit opportunities for Thai businesses.
- **Intense Competition:** The ease of entering the fruit packing business has attracted a surge of Chinese investors who dominate the supply chain, from farming to export logistics. This has raised concerns over potential monopolization by foreign packing houses, which could ultimately dictate prices and control the Thai fruit market.
- **Legal and Tax Concerns:** Some Chinese packing houses operate legally, registering as joint ventures or individual businesses. However, certain Chinese individuals enter as tourists, purchasing fruit seasonally and exporting them without contributing tax revenue to Thailand.
- **Concerns Over Land Ownership:** Chinese packing houses may purchase and control agricultural land, sometimes through local nominees, potentially affecting Thai farmers by reducing their access to land.

In summary, foreign packing houses possess significant market power, often setting terms and prices for Thai fruits. Additionally, Thailand's overreliance on China as its primary export market exacerbates these challenges. Addressing these negative impacts is critical to ensuring sustainable development in Thailand's agricultural economy.

8. POLICY RECOMMENDATIONS

To enhance the capabilities and competitiveness of Thai fruit packing businesses, the government should take the following actions:

8.1 Expanding Market Access for Thai Fruits

Currently, Thailand relies heavily on the Chinese market, which poses a risk if China decides to halt or reduce imports or starts sourcing fruits from other countries. Thailand's relevant agencies should take the following steps:

- **Preserving Existing Markets:** While maintaining the Chinese market, also explore new potential markets, such as the Middle East, India, and regions with large Asian communities that are familiar with Thai fruits.
- **Proactive Fruit Marketing:** In existing markets, maintain and expand Thailand's market presence by promoting Thai fruit characteristics, quality, preservation, and consumption methods. In new markets, use diplomatic channels, such as commercial attachés, to raise awareness and increase export volumes to high-potential regions like Japan and Europe.
- **Increasing Budget and Resources:** Allocate more budget, personnel, and activities for promoting Thai fruits in international markets beyond China. This can be done through trade fairs, business matchmaking events, and other promotional initiatives.

8.2 Strengthening Government Regulation

- **Stricter Enforcement of Existing Laws:** Enhance surveillance and monitoring of packing house operators whose practices may violate the Trade Competition Act of 2017, including unfair trade practices or collusion to manipulate fruit prices. Increase scrutiny of foreign-owned packing houses' land ownership under the Land Code and closely monitor activities of Chinese "individual" packing operators to ensure they comply with Thai laws.
- **Improving Fruit Quality Control:** Ensure rigorous quality inspections, especially during peak harvest seasons when prices are high, such as with durian. Quality issues, such as the sale of under-ripe durians, can damage the reputation of Thai fruits.

8.3 Enhancing Thai Packing House Competitiveness

- **Providing Low-Interest Loans:** Support small Thai packing houses with access to low-interest financing, as they often face capital constraints compared to foreign-owned operations.
- **Encouraging Industry Cooperation:** Promote collaboration among Thai packing houses and farmer groups to foster information sharing, knowledge exchange, and innovation to strengthen competitiveness.
- **Supporting Technology and Innovation Investments:** Encourage packing houses to adopt technologies that improve operational efficiency and product quality, such as automated sorting machines, durian starch content testers, packaging innovations, quality preservation technologies, logistics, and traceability systems.
- **Building Thai Fruit Brands:** Encourage Thai packing houses to develop unique brands that highlight the distinctive qualities of Thai fruits, adding value and differentiation from foreign competitors.
- **Improving Production Standards:** Support Thai packing houses in meeting export standards by obtaining certifications like GAP (Good Agricultural Practices) and GMP (Good Manufacturing Practices). Facilitate the inspection and certification process to ensure high safety and environmental standards.

8.4 Supporting Direct Export Capabilities of Thai Packing Houses

- **Developing Foreign Market Networks:** Facilitate networking between Thai packing houses and international buyers and provide training in foreign market regulations and marketing.
- **Enhancing Harvest Team Skills:** Since quality issues like under-ripe durians can lead to import suspensions or price drops, training harvesters to become skilled professionals is essential to maintaining the high quality of Thai durians.

8.5 Data Integration

- **Connecting Supply Chain Data:** Integrate databases related to fruit packing houses from multiple sources along the supply chain for deeper analysis. For example, linking the Department of Agriculture's database with that of the Department of Business Development and other relevant agencies, such as the Office of Trade Policy and Strategy, the Office of Agricultural Economics, and the Trade Competition Commission of Thailand, can enhance data utility and strategic planning.

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A FEASIBILITY STUDY ON USING PROFESSIONAL CERTIFICATION FOR RECRUITMENT OF NON-CIVIL SERVANT PERSONNEL IN GOVERNMENT AGENCIES*

*Alongkorn Chaladsook***

Keywords: Certification, Vocational qualifications, Employees—Recruiting, Public officers, Personnel management

INTRODUCTION

The development of skills and competencies for all working professionals is a critical component that directly impacts the economic and social driving forces of a country. Enhancing potential in this area not only increases national competitive capabilities but also builds a strong foundation for the country. Under the oversight and support of the government, government personnel must possess appropriate skills and competencies to efficiently perform their professional pursuits. Therefore, investing in human resources in both private and public sectors is a vital approach for sustainable national development.

The Office of the Civil Service Commission (OCSC) is the main agency responsible for managing government personnel, overseeing both the quality of life and work efficiency of officials. After the civil service reform in 2002, the personnel structure underwent changes, now comprising civil servants and non-civil servant groups such as permanent employees, government employees, and contract workers. The latter group plays a significant role in supporting the civil service system. Yet, they lack certain professional development benefits. To reduce such a gap, in 2017, the Thailand Professional Qualification Institute (Public Organization) (TPQI) collaborated with the OCSC and the Ministry of Digital Economy and Society to develop digital skills for government personnel, with a notable success. This indicated the importance of non-civil servant personnel in driving government work. Consequently, TPQI initiated a project to study the feasibility of using the professional certification system to recruit and further develop this non-civil servant personnel group.

This article consists of 5 sections. Section 1 provides a bird's eye view of the workforce in the public sector of Thailand. Section 2 gives a background of TPQI and its establishment of professional standards and qualifications for Thailand. Section 3 gives a brief account of research methodology for this study. A summary of findings and suggestions is presented in Sections 4 and 5 respectively.

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* This article is based on the report on a feasibility study project on using professional certification for recruitment of non-civil servant personnel in government agencies by Alongkorn Chaladsook et al. (2023). The project is funded by Thailand Professional Qualification Institute (Public Organization).

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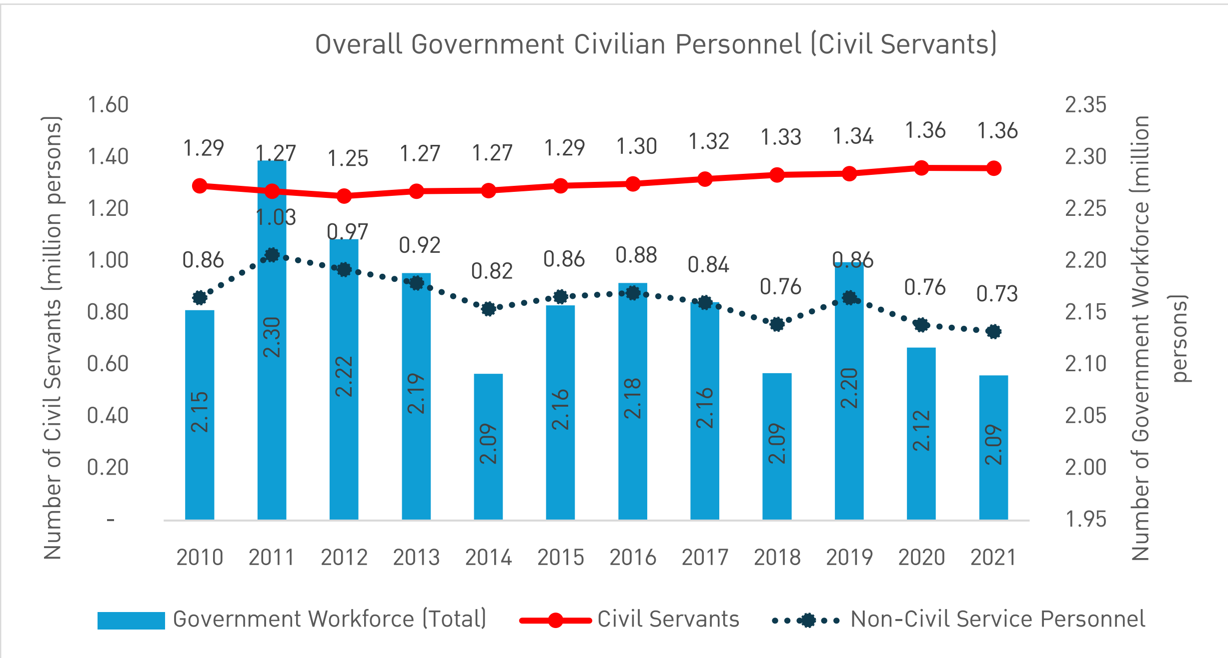
1. PUBLIC SECTOR WORKFORCE SITUATION IN THAILAND

Population changes in Thailand over the past 10 years, starting from 2010, show the country entering a phase of slowing population growth, as illustrated in Figure 1. The population decreased from 67.2 million in 2010 to 66.09 million in 2022. This decline stems from low fertility rates and a continuous decrease in the number of women of reproductive age, which consequently impacts annual birth rates and the number of newborns (United Nations Population Fund, 2022). In addition, the life expectancy in Thailand has increased compared to 30 years ago, with males' rising from 65.6 to 72.2 years and females' from 70.9 to 78.9 years, attributed to advancements in medical and public health services. Consequently, Thailand has transitioned into an aging society (Office of the National Economic and Social Development Council, 2022).

The COVID-19 pandemic in 2020 significantly affected labor market conditions, particularly unemployment rates (National Statistical Office, 2023). The public sector workforce has shown a consistent upward trend, with public sector personnel managing multiple administrative sectors, including central, regional, and local government administrations. Civil servant numbers have continuously increased and remain proportionally larger than non-civil servant groups. The non-civil servant workforce, particularly government employees, has experienced substantial growth. Temporary employee numbers in 2022 increased significantly (as shown in Figures 1 and 2). Over the past decade (2010–2021), public sector personnel expenditures have consistently risen. This includes expenses for pensions, salaries, civil servant compensation, and medical treatment. The proportion of pension and retirement benefits has increased considerably, while civil servant salary and permanent employee wage expenditures have trended downward (Comptroller General's Department, 2022).

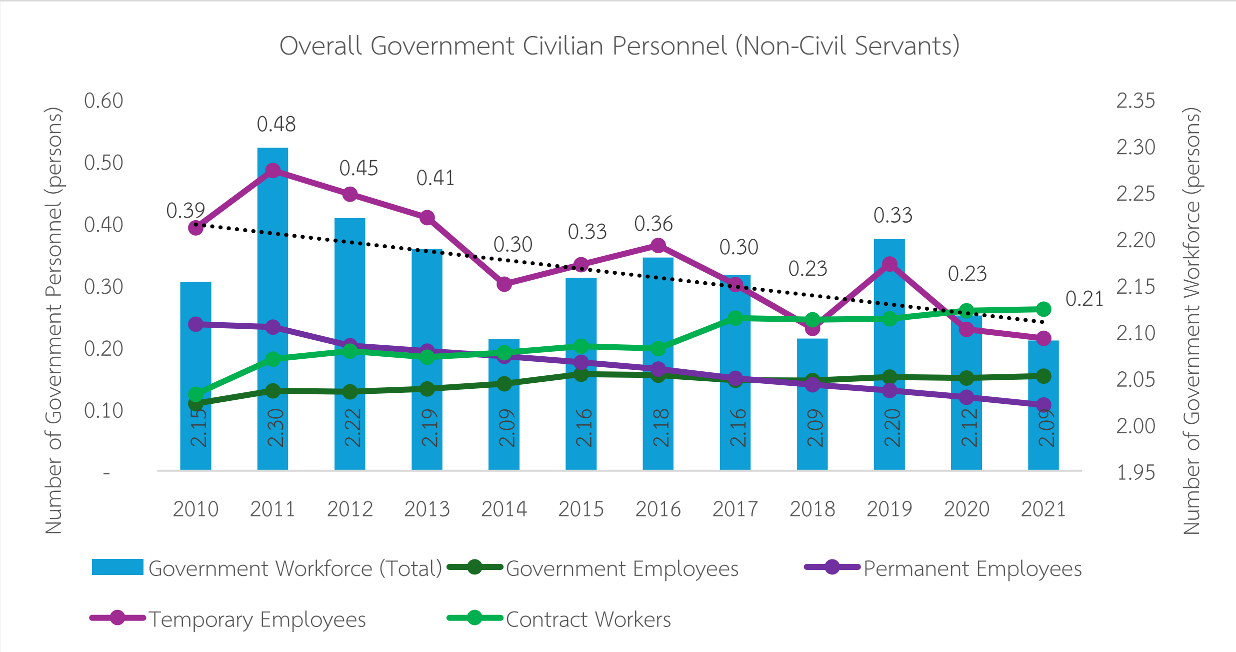
Figure 1

Public Sector Workforce Classified by Civil Servant and Non-Civil Servant Groups



Note. Adapted from Information and Communication Technology Center, Office of the Civil Service Commission, 2023.

Figure 2
Non-Civil Service Public Sector Workforce



Note. Adapted from Information and Communication Technology Center, Office of the Civil Service Commission, 2023.

The civilian government workforce does not include personnel from the Ministry of Defense (military personnel, government employees, permanent employees, and temporary employees) and four other personnel types: State Enterprise Employees, University Employees, Ministry of Public Health Employees, and Public Organization Employees.

The proportion of government personnel in Thailand in 2021 was only 7.77%, compared to other countries such as the United Kingdom at 16%, the United States at 14.9%, South Korea at 8.1%, and Japan at 5.9%. Compared to other countries, Thailand's proportion of government personnel is relatively low. The declining population trend, rapid advancements in innovation and technology affecting people's lifestyles and behaviors, the COVID-19 pandemic, and various budgetary constraints directly impact government administration and the workforce in the public sector. As a result, the number of government personnel, both civil servants and non-civil service government staff, may need to be reduced in the future. A key strategy for addressing this issue is for the government to adjust its role and mission by integrating modern innovations and technologies to improve working methods, especially by enhancing the work efficiency of government employees. Furthermore, a systematic and comprehensive human resource management strategy is necessary, one that is based on competencies, performance outcomes, and merit, with a focus on making human resource management more flexible, agile, transparent, and equitable, offering diverse employment models (Nakarin Srilert, 2023).

The development of government personnel is a key factor that helps public organizations navigate through challenging contexts and sudden changes. In particular, the shift in the paradigm of development must focus on enabling government personnel to learn and develop themselves. This includes creating an ecosystem that fosters continuous and flexible learning and development, while keeping pace with changes. Additionally, digital technologies should be incorporated into the learning and development process to accelerate the enhancement of government personnel's capabilities and work efficiency.

The OCSC, as the central agency for human resource management, under Section 13 (2) and (7) of the Civil Service Act, B.E. 2551, has studied and developed policy guidelines for the development of public sector personnel. These guidelines are referred to as the “Guidelines for Public Sector Personnel Development 2020–2022,” to provide a framework for government personnel in managing their own learning and development, and for public agencies and leaders to promote learning and development that aligns with changing global and national contexts. This approach aims to equip government personnel with appropriate mindsets and skillsets for effective work in the present and future. It also helps public organizations create an ecosystem that fosters effective learning in the workplace (Office of the Civil Service Commission, 2020).

2. PROFESSIONAL STANDARDS AND QUALIFICATIONS OF THAILAND PROFESSIONAL QUALIFICATION INSTITUTE (PUBLIC ORGANIZATION)

Thailand Professional Qualification Institute (Public Organization): TPQI is a government agency under the Prime Minister with the main responsibility of promoting, supporting, and developing the professional qualification system. It establishes professional standards developed by groups of professionals in relevant fields, certifies competencies to ensure compliance with internationally recognized standards. The Institute also serves as a central hub for information networks to drive the development of the country's workforce through the professional qualification system, which is adaptable to the free movement of labor within the ASEAN Economic Community (Thailand Professional Qualification Institute (Public Organization), 2023).

The concept of establishing TPQI was first considered in 2004, which was based on proposals from the Office of the Vocational Education Commission (OVEC) and the National Economic and Social Development Council (NESDC). This initiative stemmed from a proposal by the Federation of Thai Industries to the Prime Minister for the creation of a central organization to foster collaboration between the private and public sectors in enhancing the skills, knowledge, and capabilities of the workforce to meet the needs of enterprises, with a focus on competency-based work. The term "competency" refers to measurable, standardized, and systematic skills that serve as tools for workforce development. The objective is to promote and support government agencies in developing a workforce capable of meeting market demands, thus improving the country's competitiveness.

The Professional Qualification Framework was developed as a benchmark to define professional qualification levels in alignment with competency standards. The framework outlines the knowledge, skills, and desirable qualities, the scope of responsibilities, expected outcomes of work, innovations, and the difficulty level of specific tasks at each professional qualification level. The entry-level qualification framework focuses on the ability to perform tasks according to operational standards, while higher qualification levels emphasize the creation of new innovations, working methods, or technologies within one's profession. The high-level Professional Qualification Framework (Professional Qualification Framework) includes descriptions of job characteristics that distinguish professional competencies or the scope of work for an individual in the profession. It is used to categorize levels based on work outcomes, the desired results from performance, task complexity, and the responsibility for those outcomes. This framework provides guidance for professional development from entry-level to the highest level in a profession, with professional qualifications defined according to competency standards, referred to as "Professional Qualification."

Figure 3

Linking/Benchmarking to the National Qualifications Framework

Educational Qualifications			National Qualifications Framework	Professional Standard	
Basic Education	Vocational Education	Higher Education		Professional Qualification Framework	Labor Skill Standards
		Doctorate Degree	Level 8	Level 8	
		Master's Degree	Level 7	Level 7	
	Bachelor's Degree (ทล.บ.)	Bachelor's Degree (degree)	Level 6	Level 6	
	High Vocational Certificate (ปวส.)	Associate degree	Level 5	Level 5	Level 5 (MRS 3.3)
			Level 4	Level 4	Level 4 (MRS 3.2)
Upper Secondary + Vocational Skills (Vocational Certificate)	High Vocational Certificate (ปวช.)		Level 3	Level 3	Level 3 (MRS 3.1)
Secondary School (M.4-6)			Level 2	Level 2	Level 2
Primary School (M.1-3)			Level 1	Level 1	Level 1

Mechanisms for Linkage/Completion to Compare/Transfer Between Educational Qualifications and Professional Standards

- Testing, assessment, and evaluation
- Gaining additional knowledge through formal, non-formal, and informal education
- Credit transfer based on work experience/practical training and real-life work application
- Accumulation of learning units (Credit Bank)

Continuing Education/Lifelong Learning

Note. National Qualifications Framework Office and Office of the Education Council.

3. USING PROFESSIONAL CERTIFICATION FOR RECRUITMENT OF NON-CIVIL SERVANT PERSONNEL IN GOVERNMENT AGENCIES

As mentioned earlier, the initiative of using professional certification (or TPQI certificate for simplicity) for the recruitment of non-civil servant personnel in government agencies stems from the successful development of digital skills for government personnel undertaken by the TPQI in collaboration with the OCSC and the Ministry of Digital Economy and Society in 2017. If acceptable, TPQI certificates can facilitate the official recruitment of non-civil servant personnel in government agencies and gives rise to further development, mobilization and utilization of those personnel.

Because of time and resource constraints, a feasibility study of the use of TPQI certificate for the recruitment of non-civil servant personnel in government agencies was undertaken via Delphi method, i.e. by interviewing a few key informants and stakeholders, particularly, those who have undergone and passed qualification assessments, assessment institutions, and meetings with relevant organizations.

4. SUMMARY OF FINDINGS

The study found that all parties unanimously agree that the use of professional qualifications in the recruitment process for government positions is "feasible" and will help ensure the recruitment of suitable personnel for the job, thereby reducing resource wastage and saving time.

The study also reveals that, currently, the government must allocate a large budget for civil servants. However, the shortage of personnel in government agencies has been a long-standing issue. As a result, the government has had to adjust its employment model by hiring more government employees and contract workers. The selection process for civil servants involves several steps, with the OCSC being the agency responsible, ensuring that the selected candidates are well-qualified and suitable for the position. Meanwhile, the recruitment process for government employees and contract workers may have gaps in selection, which could affect the quality of the candidates chosen. Therefore, using a professional qualification system in the recruitment of non-civil servant personnel could be a good alternative for government agencies.

The Thailand Professional Qualification Institute (Public Organization) is the national agency responsible for developing the professional qualification system and creating occupational standards. Currently, more than 1,000 occupational standards have been set up by TPQI. The professional qualification system is thus considered an important tool for assessing job performance and job positions. In each occupational field, frameworks, definitions, and job characteristics are established to define the competencies required for positions. Therefore, using professional qualification certificates in the recruitment of personnel for government agencies can increase accuracy and efficiency in selecting qualified individuals who are well-suited for the job. Typically, the recruitment process is based on objective tests and interviews, while performance-based assessment may not always be possible due to various limitations.

The adoption of the professional qualification system in the selection of non-civil servant personnel in the public sector is feasible, but there are some limitations. For example, the professional qualification assessment system may not cover all job positions, including those where the job description must be clearly defined to conduct an accurate qualification mapping analysis. However, some levels of professional qualification assessments charge a fee for testing (Thailand Professional Qualification Institute (Public Organization), 2016), and the agencies or organizations that can assess individual competencies are still centralized in Bangkok. In the future, if the professional qualification system is used for selecting personnel for government agencies, these limitations may need to be considered.

5. SUGGESTIONS

Although the professional qualification system in the selection of non-civil servant personnel in the public sector is feasible, in practice, there may be both positive and negative factors in the use as indicated in Table 1.

Keeping in mind the aforementioned factors, a few policy suggestions are made at two levels: the policy level and the operational level, as follows.

1. Policy Level

1.1 The government should support the efficient collection and public dissemination of government workforce statistics

From previous studies, it has been found that government workforce data collection is still in the form of an aggregate of personnel such as there is only an overall projection of personnel by agency, categorized as civil servants and non-civil servants. Moreover, the number of non-civil servants is presented as an aggregate distribution without important qualifications such as age, gender, educational background, and is limited only to agencies under the responsibility of the OCSC. It does not include agencies from the Ministry of Interior or the Ministry of Defense. It is understood, however, that these types of data involve national security and are usually not publicly disclosed. These data may be stored within their respective original agencies and have not been disseminated externally.

Due to these data limitations, the research team cannot analyze all future target personnel needs. Workforce statistical data is crucial for forecasting trends and understanding personnel requirements in both quantitative and qualitative aspects and is especially critical during a period of the declining workforce. To prevent work concentration, there should be data linkage between agencies, potentially with the OCSC acting as a central unit for data collection and statistical dissemination. Meanwhile, personnel-related departments at the departmental level would be responsible for submitting data to the OCSC for further distribution.

Relevant Agencies: Office of the Civil Service Commission, National Statistical Office, and the relevant government agencies.

1.2 Improving Certain Civil Service Personnel Limitations to Facilitate the Professional Qualification System

Even in the recruitment and selection of individuals to become civil servants or government employees, there may be opportunities to apply the professional qualification system, such as hiring government employees in specialized technical fields, which includes the requirement of educational qualifications and work experience. This work experience can be transferred using the professional qualification system. However, in practice, it must comply with government regulations overseen by the OCSC. Meanwhile, when recruiting temporary staff for government or local authority agencies, these agencies have the authority to directly recruit without going through the OCSC. Therefore, if the professional qualification system is applied to the recruitment of non-civil service personnel, it can be implemented immediately (with only a few exceptions). If these government agencies wish to use the professional qualification system as a tool for selecting personnel, they can contact the Thailand Professional Qualification Institute (Public Organization) or evaluation organizations directly. In contrast, recruiting government employees cannot be done in this way, resulting in wasted time and a lack of access to qualified personnel. As a result, there may be a need for revisions to government regulations in the future.

Relevant Agencies: Office of the Prime Minister, Office of the Civil Service Commission (OCSC).

Table 1

Positive and Negative Factors of the Professional Qualification System in the Selection of Non-Civil Servants in the Public Sector

Positive Factors	Negative Factors
- Thailand Professional Qualification Institute (Public Organization) are well-prepared in all aspects, such as a variety of professional standards, qualification assessments, and coordination with evaluating institutions. - The RESK (Recognition of Existing Skills and Knowledge) assessment process is straightforward. Evaluators can prepare evidence according to the checklist and submit it to the certifying organization for assessment. - All government agencies agree on the benefits of using professional qualifications for selecting personnel.	- Lack of practical labor force statistics - Certain limitations in government regulations - Lack of support for examination fees - Lack of motivation to conduct assessments

2. Operational Level

2.1 Supporting Strategies for Motivating Participation in Professional Qualification Assessments

One of the main issues causing both the originating organizations and applicants to overlook the importance of using the professional qualification system is the lack of awareness regarding the value of the system, particularly in terms of the high examination fees or uncertainty about the assessment results will benefit their career progression. Therefore, it is essential to garner cooperation from various stakeholders to create incentives in different aspects, such as co-supporting exam fees in a co-payment manner, offering monetary rewards for passing the exam, or providing rewards like coffee vouchers, etc.

Another issue is that although those who wish to take the exams are eager to participate, limitations related to language and its use, as well as the concentration of assessment institutions in central areas, often make it difficult to commute. Therefore, professional qualification institutions and their networks should promote various accessible channels to facilitate individuals who wish to participate in professional qualification assessments.

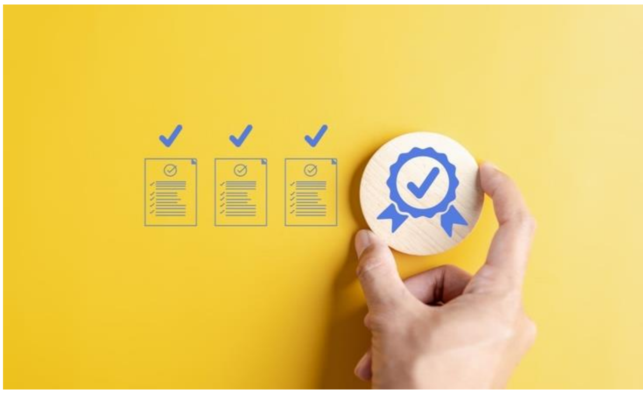
Relevant Agencies: Thailand Professional Qualification Institute (Public Organization) and networks, relevant government agencies.

2.2 Supporting Forming up Professional Qualification Assessment Groups and Networks

Professional Qualification Assessment Groups: It has been found that there is currently no grouping or consolidation of individuals who have passed professional qualification assessments, resulting in a lack of strength. As a result, these individuals lack bargaining power, particularly in areas such as wages with employers or those seeking to hire, or even career advancement paths. These factors make workers fail to see the importance of participating in the assessment.

Assessment Institutes/Certification Organizations: Creating a network between assessment institutes and certification organizations will lead to academic knowledge exchange, as well as services and management activities, which are a way to strengthen the organizations. Additionally, it facilitates those wishing to undergo professional qualification assessments without being concentrated solely in the central areas.

Related Agencies: Thailand Professional Qualification Institute (Public Organization) and networks, relevant government agencies.



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