Required Report: Required - Public Distribution **Date:** July 06, 2022

Report Number: TH2022-0044

Report Name: Retail Foods

Country: Thailand

Post: Bangkok

Report Category: Retail Foods

Prepared By: Sukanya Sirikeratikul

Approved By: Eric Mullis

Report Highlights:

This report gives an overview of Thailand's food retail sector and current market updates. The food and beverage industry is one of the biggest retail segments in Thailand. Food and beverage sales grew more in 2021 than the previous year due to increased in-home consumption and cooking at home. Thailand's growing young, middle-income population with higher disposable incomes and a greater propensity to spend, and a trend towards urbanization have also fueled the growth in the retail industry. Higher domestic spending, a recovery in tourism, and exports will sustain the Thai economy in 2022.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

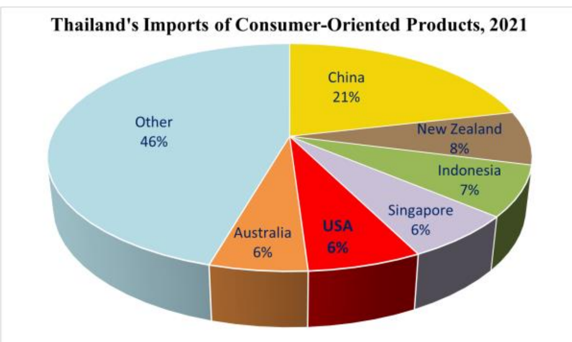
Market Fact Sheet: Thailand

Executive Summary

Thailand is Southeast Asia's second largest economy with a 2021 gross domestic product (GDP) of $506 billion. Thailand's economy continues to recover from the pandemic with the support of government stimulus programs and public health measures on vaccination programs. Thailand remains a strong agricultural competitor as it is the world's leading exporter of natural rubber, frozen shrimp, canned tuna, canned pineapples, cooked poultry, and cassava. It is also a major exporter of sugar and rice. Thailand is the 18th largest export market for U.S. agricultural products, while the United States is the third largest supplier of agricultural products to Thailand, with 11 percent of total import market share.

Imports of Consumer-Oriented Products

In 2021, the United States was the fifth largest supplier of consumer-oriented products to Thailand with exports valued at $445 million.



Food Retail Industry

Higher domestic spending, a recovery in tourism, and exports will sustain the Thai economy in 2022. The food and beverage industry is one of the largest retail segments in Thailand. The country's economic growth, coupled with higher disposable incomes in the middle-income population, a greater propensity to spend, and a trend towards urbanization fueled the growth in the retail sector prior to the pandemic. Changes in the structure of Thai households and the pandemic have led to changes in how Thais eat with a rising demand for convenient ready-to-eat meals, healthy food products, and food delivery.

Food Processing Industry

Thailand's food processing industry has developed rapidly and is one of the most developed in Southeast Asia. There are many medium-to-large food processors that produce high-value products for domestic and export markets. The value of Thai food exports was $34.6 billion in 2021. Thailand imported $3.2 billion in food ingredients in 2021 to support its large food manufacturing sector and exports. With rising demand for processed foods, Thai food processors must import large quantities of food ingredients that are not locally available.

Quick Facts 2021

Imports of Consumer-Oriented Products: $7.0 billion

List of Top 10 Growth Products in Host Country

1) Dairy products	2) Spices
3) Seafood products	4) Food preparation
5) Fresh fruits and vegetables	6) Bakery products
7) Tree nuts	8) Wine and beer
9) Chilled/frozen beef	10) Healthy beverages

Food Industry by Channels (U.S. billion) 2021

Total Agricultural Exports:	$42.4
Total Agricultural Imports:	$20.6
Full-Service Restaurant Sales	$3.5
Food Delivery Sales	$2.5
Food and Drink E-commerce Sales	$0.5

Top Thailand Retailers

Supermarkets
1) Central Food Retail
2) Gourmet Market
3) Villa Market
4) Foodland
5) UFM Fuji Super
6) MaxValu

Hypermarkets
1) Lotus's
2) Big C

Cash and Carry
1) Makro

Convenience Stores
1) 7-Eleven 2) Family Mart 3) Lawson 108

GDP/Population
Population *(millions)*: 69.95
GDP *(billions USD)*: $506 (as of 02/2022)
GDP per capita *(USD)*: $7,256 (as of 02/2022)

Strengths/Weaknesses/Opportunities/Challenges

Strengths: Strong food industry with well-established retail, food service, and food processing industries.	**Weakness:** High level of local industry protection results in restrictive trade barriers for imported food and beverages
Opportunities: Rising incomes and rapid urbanization. Urban Thai consumers are more willing to pay for premium food products.	**Challenges:** High import tariff on U.S. food exports to Thailand.

Data and Information Sources: Euromonitor, TDM, Office of the National Economic and Social Development Board, World Bank, Kbank Research, and Industry Estimates

SECTION I – MARKET SUMMARY

Higher domestic spending, a recovery in tourism, and exports will sustain the Thai economy in 2022. The National Economic and Social Development Council (NESDC) forecasted Thailand's gross domestic product (GDP) growth projection for 2022 to be between 2.5-3.5 percent or an average of 3 percent, which is lower from the earlier projection of between 3.5-4.5 percent due to uncertainties over the conflict in Ukraine. The retail market faced a lot of challenges in 2021 from the economic slowdown, elevated commodity prices, decreased purchasing power, logistic issues from the pandemic, China's lockdown policy that slowed the return of tourists to Thailand, and changes in consumer behavior. Kasikorn Research Center reported that Thailand's retail sector contracted 6 percent in 2021, with a total value of $103 billion, while the share of e-commerce in the retail sector could increase 36 percent, capturing 11 percent of the Thai retail business. However, the government launched several stimulus measures related to travel and shopping to increase people's purchasing power, stimulate spending, and decrease people's cost of living. Retail businesses have been under major economic pressure due to various factors, including rapid consumer behavioral changes.

Thailand removed all entry requirements due to COVID-19 on July 1, 2022. International tourists no longer need to register under Thai pass, and there are no quarantine requirements. The Ministry of Tourism and Sports expects the number of international tourists during the third quarter of 2022 to be around 2.7-3 million, and more than one million during the last quarter of 2022, reaching 7-10 million international tourists arriving in Thailand in 2022. Thailand's economic growth is the main driver for growth in Thailand's retail industry. Thailand's growing young, middle-income population with higher disposable incomes and a greater propensity to spend, and a trend towards urbanization have also fueled growth in the retail industry.

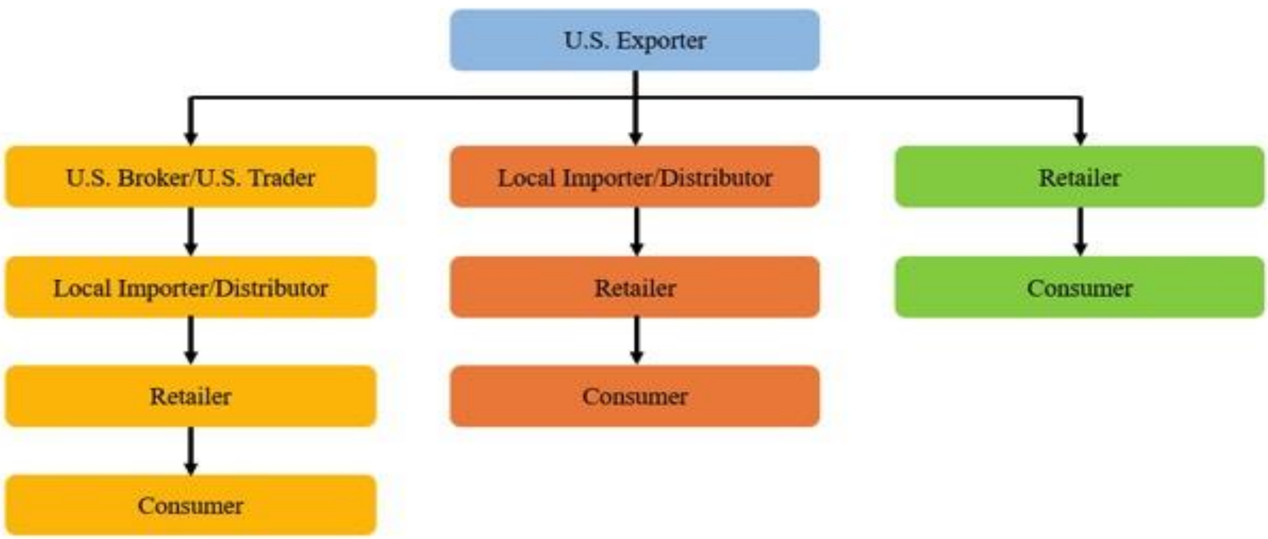
Food and beverage sales are driving Thailand's retail sector. Their sales grew more in 2021 than the previous year due to increased in-home consumption and cooking at home. Sales of packaged foods in 2021 was $15.67 billion, a slight increase from $15.48 billion in 2020. The pandemic and changes in the structure of Thai households have led to changes in how Thais eat with a rising demand for convenient ready-to-eat meals, healthy food products, and food delivery. In 2030, the population with the age over 60 years old will increase to 27 percent of the total population. A growing aging population, coupled with the pandemic, has increased demand for healthy and functional food products. Thais prioritize healthier eating habits to protect themselves from illness and for their general well-being. Therefore, retailers are offering more food products with less calories and reduced salt and sugar to serve their health-conscious consumers. The enforcement of the sugar tax on non-alcohol beverages has encouraged the production and import of beverages with a lower sugar content to reduce costs, which as provided health-conscious customers with more beverage options.

Thais continue adapting to a new normal way of life due to the COVID-19 pandemic. Demand for products for in-home consumption and cooking, such as fresh food and ready to cook products, has increased. In addition, the use of online ordering and delivery services has grown, while less people are going to physical stores. Many retailers are using their store outlets as distribution points for delivery services, which helps capture more sales and maintain product quality. Due to increasingly hectic lifestyles, demand for products that can offer better health, boost wellbeing, manage weight, and increase nourishment is growing even for products that are generally more expensive than their alternatives.

Advantages	Challenges
U.S. exporters can provide a variety of high-quality agricultural products ranging from fresh to processed foods.	U.S. products are generally less price competitive than comparable products from countries that have free trade agreements (FTA) with Thailand, such as Australia, New Zealand, China, Peru, Chile, India, Korea, and Japan.
Thai officials and consumers highly regard U.S. food safety regulations. Thai government health authorities use U.S. FDA norms as a reference to enforce more efficient regulations to safeguard consumers.	A lack of local interagency communication and coordination causes interruptions in trade, as new import regulations go into effect without prior notification.
In 2030, the population with the age over 60 years old will increase to 27 percent of the total population. Many in the Thai elderly population can afford high-quality, premium products.	Substitutes for American imports can be produced locally or regionally, frequently at lower cost. High import tariffs on some consumer food and beverage products make it easy to replace U.S. imports with locally or regionally produced items.
Health-conscious consumers create new opportunities for U.S. exporters particularly those who have products marketed as sustainable, containing all-natural ingredients, or have other marketable health features.	Supply chain challenges (e.g., port and labor challenges, high logistic costs, and container shortages) are increasing the time it takes to get product from the United States to Thailand.

Retailers have improved and developed their supply chain systems to strengthen their capacity to source and supply products during the pandemic. Most retailers, especially supermarkets, hypermarket and cash and carry, are offering a wide range of value-added fresh food to meet customers' needs, including marinated, ready-to-cook, ready-to-eat meals, and plant-based food and beverages.

SECTION II. ROAD MAP FOR MARKET ENTRY



Food importers in Thailand are constantly looking for a variety of new imported products to offer to retailers. The tastes and preferences of Thais drive the merchandising at supermarkets and hypermarkets. To penetrate the retail food sector, it is often best for U.S. exporters to partner with importers/distributors willing to introduce products to major retailers. Offline and online promotional activities, point of sales (POS), and product samplings are important tools to promote food and beverage products in the Thai retail food market. In addition, advertising through social media, celebrity endorsements, and bloggers are highly effective at boosting demand for food and beverage products. Social media has become an indispensable tool for marketing food and beverages in Thailand. More information is available at Report: 2022 Social Media Marketing Trends for the Food Industry in Thailand

Supermarkets such as Central Food Retail and Villa Market have their own import divisions. Makro (cash & carry) also sources and imports food and beverages products worldwide. Several government agencies regulate food products imported into Thailand, such as the Food and Drug Administration (FDA) of the Ministry of Public Health, the Department of Livestock (DLD) and the Department of Agriculture (DOA) of the Ministry of Agriculture and Cooperatives, and the Thai Excise Department of the Ministry of Finance. U.S. exporters can learn more about import requirements and documentation for food and beverage products from GAIN Reports, which include the Food and Agricultural Import Regulations and Standards – Annual Country Report and Certification. Furthermore, food shows in Thailand (as listed below) are a great way to meet key importers who are looking to source new products, to create networks with exporters, and to learn more about new food trends:

THAIFEX Anuga Asia
Date: May 23-27, 2023
Venue: IMPACT Arena, Exhibition and Convention Center, Bangkok

Food & Hospitality Thailand (FHT)
Date: September 21-24, 2022
Venue: Queen Sirikit National Convention Center (QSNCC), Bangkok

Modern Grocery Retail Outlets in Thailand

There are three major conglomerates dominating the Thai retail market (i.e., Central Group, TCC Group, and CP Group). Central Group owns Central Foodhall and Tops Market supermarket chains. The TCC Group, which also has Thai Beverage (the key alcohol beverage producer under Chang beer) has Big C. The CP Group runs 7-Eleven, a convenient store chain with over 13,000 outlets; Makro, which is a cash-and-carry store; and Lotus's, which is one of the only two major hypermarket retailers in Thailand.

Convenience Stores:
This sector has experienced a continuous growth in comparison to other retail formats. Thailand has a total of 20,323 stores nationwide, with 970 stores opening in 2021. Demand for convenient, inexpensive, and time-efficient foods has increased significantly due to changes in Thai society. Food and beverage products account for approximately 74 percent of all products sold in convenience stores including ready-to-eat meals, fruit, baked goods, a variety of snacks, desserts, coffee, beverages, and other confectionaries. Convenience store operators have also increased healthy food assortments such as ready-to-eat fresh fruits and vegetables, fruit and vegetable juices, functional drinks, low-calorie foods, and healthy snacks to accommodate the need and growth of health conscious and aging customers. On average, over 11 million customers shop at a convenience store nationwide per day in 2021. 7-Eleven also arranges vending machines that sell food, beverages, and non-food products in some areas not suitable to have store. In 2021, the company had over 2,600 vending machines nationwide. 7-Eleven has also collaborated with well-known restaurants to produce new ready-to-eat meals (https://www.7eleven.co.th/new-product/bakery/2286-rosniyom) and with Chef Cares, a non-profit that partners with famous chefs to create new ready-to-eat meals and whose profits go to charitable activities such as helping underprivileged youth with their culinary dreams (https://www.7eleven.co.th/new-product/bakery/2064-chef-cares).

Supermarkets:
Supermarkets are highly competitive and are concentrated in Bangkok and in other major provinces such as Chiang Mai, Phuket, Chonburi, and Nakorn Rachasima. Thailand's supermarket segment has many players including Central Food Retail (Central Food Hall and Tops Supermarket), MaxValu, The Mall Group (Gourmet Market), Villa Market, UFM Fuji, and Foodland. Middle to high income consumers remain the key target segment for supermarkets, offering premium products and services. Supermarkets had recorded the strongest sales growth in the retail industry because they sell daily necessities and consumables to high-spending middle- and upper-income earners. The estimated average sales per square meter of supermarket, however, was $254 per month in 2021, a 12 percent decrease from the previous year. Supermarkets often seek exclusive arrangements with international exporters to offer unique and hard-to-find items to differentiate themselves from their competitors. Consumers recognize the high quality of imported food and beverages such as beef, fruits, vegetables, seafood, frozen food, beverages, packaged foods, and organic products. Most supermarkets now have dine-in counters (in-store restaurants) that will cook food purchased in the retail stores for in-store dining or take home. This allows them to promote meat and seafood products in their frozen/chilled form, prepared in restaurant menus, or prepared in take-home meals.

Hyper Market/ Cash & Carry:
Hypermarkets and "cash & carry" establishments present good opportunities for U.S. exporters of fresh and frozen food, beverage products, and products that cater to mainstream consumers. Cash and carry retailers' target customers are small to medium sized grocery shops, hotels, restaurants, caterings, and other food service operators. Due to limited space and high land costs in the Bangkok metropolitan area, new outlets have expanded to other provinces focusing on large growing provincial cities. Hypermarket operators are also diversifying their store formats to smaller-scale retail stores including supermarkets and convenience stores.

Online Retailing:
The lock down and remote work during pandemic gave consumers an opportunity to embrace the convenience of online purchasing. The Electronic Transactions Development Agency reported that online retail sales reached $51 billion in 2021, up from $46 billion in 2020. Euromonitor reported that e-commerce sales of food and beverage was $498 million in 2021, up 14 percent from $435 million in 2020. A rapid growth in smartphone penetration, a young and tech-savvy population, and rising internet penetration has allowed Thais to access the internet at their convenience and at faster speeds. The increased access to the internet has driven growth in the retail online commercial market. In addition, COVID-19 transformed consumer behavior and accelerated the growth of online grocery purchases. People are demanding more convenience and speed from their products and services. The demand for online purchases pushed grocery retailers to quickly launch or expand their e-commerce offerings when the pandemic first started. Nevertheless, online sales revenue accounts for only 10-15 percent of total revenue. Many retailers have utilized omnichannel retailing during the pandemic. For example, Central Food Retail heavily utilized omnichannel retailing from 10 percent of total sales in 2020 to 20 percent in 2021 and resulted in an increase of 171 percent food sales in 2021 compared to the same period last year.

The online grocery channels with the highest growth in 2021 were e-retailers. The changes and digital disruptions due to COVID-19 on retail businesses forced retailers to expand and adjust their online marketing strategies to fit with consumers' modern lifestyles, where payment and delivery of products are faster and more convenient. Therefore, retailers in Examples of retailers that successfully launched their online food (e-commerce) channels are 7-Eleven (www.allonline.7eleven.co.th), Central Food Retail (www.tops.co.th), Gourmet Market (http://www.gourmetmarketthailand.com), Villa Market (https://shoponline.villamarket.com/home), Lotus's (www.lotuss.com) Big C Supercenter (https://www.bigc.co.th/), and Siam Makro (www.makroclick.com). These retailers either developed their own delivery service or collaborated with a third-party grocery delivery service provider such as Happy Fresh, GrabFresh, and LINEMAN Mart.

Key Players and Outlets

Convenience Store					
Brand	**Company Name**	**2018**	**2019**	**2020**	**2021**
7-Eleven	CP All PCL	10,988	11,712	12,432	13,134
Lotus's	CP All PCL	1,607	1,650	1,865	2,197
Mini Big C	Big C Supercenter PCL	800	1,016	1,215	1,352
Family Mart	Central Group	1,008	968	901	805

Source: USDA Foreign Agricultural Service, Bangkok, Thailand

The key leader of this sector is 7-Eleven operated by CP All Public Co. Ltd with approximately 65 percent market share in the number of outlets in 2021, followed by Lotus's (11 percent) and Mini Big C (7 percent). At the end of 2021, the CP All operated about 13,134 outlets of 7-Eleven nationwide and has more than 60 million user accounts on its online customer channels including its website, application, social media channels, and other communication channels. The CP food group sources most food and beverage products sold in 7-Eleven stores locally. However, the company recently expanded their sourcing for more imported food and beverage products for their online platform.

Supermarket					
Brand	**Company Name**	**2018**	**2019**	**2020**	**2021**
Tops and Central Food Hall	Central Group	123	127	236	281
Gourmet Market/Home Freshmart	Mall Group	20	17	15	17
Foodland	Foodland Supermarket	23	22	24	23
Villa Market	Villa Market	34	34	34	35
UFM Supermarket	Fuji Citio Co., Ltd., and Metro Group	4	4	4	4
Rimping Supermarket	Tantraphan Supermarket	10	9	8	8
Big C (Big C Market, Big C Depot, and Big C Foodplace	Berli Jucker Public Co. Ltd.	59	59	59	59
Lotus's	CP All PCL	n/a	n/a	n/a	199

Source: USDA Foreign Agricultural Service, Bangkok, Thailand

Lotus's and Big C offer a wide range of products including a wide selection of imported foods targeting middle- and high-income customers. Makro is a membership-based cash and carry retailer. Its target groups are small and medium-sized businesses including grocery shops, hotels, restaurants, catering, culinary institutions, and food business services providers. Siam Makro also has its own import division, which delivers frozen imported and local food products such as American fries, cheese, and frozen seafood.

Hypermarket/Cash and Carry					
Brand	**Company Name**	**2018**	**2019**	**2020**	**2021**
Lotus's	CP All PCL	205	216	215	222
Big C Hypermarket	Big C Supercenter PCL	147	151	151	153
Makro (Cash and Carry)	CP All PCL	129	134	137	142

Source: USDA Foreign Agricultural Service, Bangkok, Thailand

SECTION III. COMPETITION

Thailand has 17 free trade agreements (FTAs) with their trading countries. Thailand is a member of China's Regional Comprehensive Economic Partnership (RCEP) and has had a bilateral FTA with China since 2003. U.S. food products face fierce competition from similar products sourced from countries that have FTAs with Thailand, such as China, Australia, New Zealand, Japan, Korea, Peru, Chile, and India. Although the U.S. food industry has a good reputation in regard to manufacturing high-quality products, high import taxes and marketing costs limit the supply of U.S. products imported by local retailers.

Overall Competitive Situation for Consumer-Oriented Products

Products	Total Imports			Imports from the United States			Major Competitors 2021
	2020 USD	2021 USD	% Growth	2021 USD	% Growth	% Share	
Soup and Other Food Preparations	819,647,868	883,251,824	8%	186,868,412	-0.3%	21%	Singapore (28%) United States (21%) Vietnam (8%)
Dairy Products	1,077,618,701	1,169,673,346	9%	91,714,479	8%	8%	New Zealand (37%) Singapore (14%) Australia (9%)
Tree Nuts	358,890,925	380,020,433	6%	34,677,892	-13%	9%	Indonesia (44% Vietnam (28%) United States (9%)
Fresh Fruit	733,201,917	783,413,584	7%	22,097,193	-24%	3%	China (69%) Australia (8%) New Zealand (7%)
Chocolate and Cocoa Products	188,807,175	210,772,377	12%	20,805,465	8%	10%	Malaysia (34%) United States (10%) Indonesia (10%)
Pet Food	54,635,615	66,176,410	21%	12,682,266	-14%	19%	South Korea (32%) China (22%) United States (19%)
Frozen Potatoes	74,866,215	61,493,402	-18%	8,112,527	-38%	13%	India (36%) Netherlands (24%) United States (13%)
Cheese	84,443,013	90,192,447	7%	7,021,664	0.2%	8%	New Zealand (38%) Australia (24%) United States (8%)
Tea	46,859,750	48,431,836	3%	6,899,004	6%	14%	China (34%) United States (14%) Japan (13%)
Beef and beef Products	129,940,986	175,594,484	35%	6,604,263	-6%	4%	Australia (61%) New Zealand (13%) Japan (10%)
Condiments and Sauces	104,201,013	115,955,951	11%	5,422,898	-10%	5%	Japan (22%) China (19%) Singapore (11%)
Wine	62,284,235	65,806,884	6%	5,830,846	-16%	9%	Australia (34%) France (20%) United States (9%)

Baked Goods, Cereals and Pasta	313,160,035	354,294,649	17%	5,147,319	-23%	1%	Malaysia (24%) Indonesia (19%) China (19%)
Fruit and Vegetable Juices	60,925,657	53,737,845	-12%	4,447,552	-25%	8%	Israel (29%) China (14%) United States (8%)
Raisin	10,859,935	10,841,597	-0.2%	3,833,011	11%	35%	United States (35%) Iran (20%) Chile (19%)
Coffee, roasted and extracts	143,663,685	134,851,690	-6%	2,711,402	0.6%	2%	Malaysia (63%) Vietnam (10%) Laos (5%)
Spices	264,779,429	301,452,222	14%	2,715,882	-3%	0.9%	India (45%) China (27%) Vietnam (9%)
Distilled Spirits	175,243,747	156,812,157	-11%	1,848,105	-54%	1%	United Kingdom (40%) France (31%) China (12%)
Fresh Vegetables	328,572,178	344,884,208	5%	1,353,554	-34%	0.4%	China (64%) Cambodia (12%) Myanmar (6%)
Non-Alcohol Beverage	44,092,115	35,201,570	-20%	1,238,188	94%	4%	Laos (33%) South Korea (17%) France (13%)
Beer	16,370,426	19,226,402	17%	469,817	23%	2%	Vietnam (50%) Indonesia (14%) China (9%)
Chewing Gum and Candy	96,145,184	104,480,611	9%	539,378	-47%	1%	China (33%) Indonesia (24%) Vietnam (13%)

Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Top Consumer-Oriented Products Imported from the World

- The top consumer-oriented products that Thailand imports are fresh fruits snacks, beef, seafood, dried fruits, nuts, dairy products, soup, prepared food, and pet food.

Top Consumer-Oriented Products Imported from the United States

- Major consumer-oriented products from the United States to Thailand include dried fruits and nuts, food preparation ingredients, whey, milk and cream, cheeses, popcorns, frozen potatoes, fresh fruits, cocoa preparations, beef, seafood, wines, and pet food.

Products Not Present Because They Face Significant Barriers

- The United States lacks market access for pork meat, beef offal, poultry, raspberries, persimmon, pomegranate, and avocados.

Products Present in the Market Which Have Good Sales Potential

- A growing population with over 60 years old has increased demand for healthy and functional food ingredients including dried fruits, nuts, pulses, plant-based proteins, proteins and amino acids, vitamins, minerals, prebiotics and dietary fiber, probiotics, carotenoids, essential oils, omega-3 and 6 fatty acids. There is also a growing demand for organic ingredients, gluten free ingredients, plant-based ingredients, and protein boost food ingredients.
- A growing number of health and beauty-conscious consumers and sport enthusiasts has increased demand of health and wellness foods including fresh fruits and vegetables, herbs, protein drinks, functional food and drink products, and other related health products.
- Fresh fruits.

- Dairy and non-dairy beverages.
- Meat and seafood products.
- Bakery (both premium and mass market) ingredients including wheat flour, bread improver, dough blend, wheat flour, milk and cream, butter, cheese, dried fruits, potato starch, nuts, pastry fillings, sugar, and colors & flavors.
- Snack foods.

SECTION V - POST CONTACT AND FURTHER INFORMATION

The Foreign Agricultural Service in Bangkok maintains up-to-date information covering food and agricultural import opportunities in Thailand and would be pleased to assist in facilitating U.S. exports and entry to the Thai market. Questions or comment regarding this report should be directed to the Foreign Agricultural Service in Bangkok at the following addresses:

U.S. Department of Agriculture
Office of Agricultural Affairs
U.S. Embassy
Bangkok Thailand 10330
Tel: + 662 205-5106
Fax: +662 255-2907
Email: agbangkok@usda.gov
Website: www.fas.usda.gov

FAS Bangkok publishes numerous market and commodity reports, which are available through the Global Agricultural Information Network (GAIN) reporting system (https://gain.fas.usda.gov)

End of Report.

Attachments:

No Attachments