Agricultural and Fertilizer
Situation in Thailand

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Source: http://maps.google.co.th
Economy and Population

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (M persons)</td>
<td>63.39</td>
<td>63.53</td>
<td>63.88</td>
<td>64.08</td>
</tr>
<tr>
<td>GDP real growth rate (%)</td>
<td>2.5</td>
<td>-2.3</td>
<td>7.8</td>
<td>0.1</td>
</tr>
<tr>
<td>Share of agriculture in total employment (%)</td>
<td>45.56</td>
<td>45.95</td>
<td>44.83p</td>
<td>45.23e</td>
</tr>
</tbody>
</table>

Source: 1Department of Provincial Administration  
2The Fiscal Policy Office  
3Office of Agricultural Economics  
Remark: p = preliminary  
e = estimate

Agricultural Situation

Agricultural area and utilization (2010)

- Grassland 33.44%
- Forest 33.44%
- Arable land 33.76%
- Permanent crops 10.80%
- Others 21.70%

Irrigated land: 4.69 Mha

Crop area planted/harvested (M ha)

- Others 4.99
- Fruits and vegetables 0.65
- Oil Palm * 0.60
- Sugarcane 1.26
- Maize 1.16
- Cassava 1.14
- Para Rubber * 2.04
- Rice 12.47

Source: Office of Agricultural Economics
Production of Major Crops by Region 2011/2012 (Million ton)

Source: Office of Agricultural Economics

History of Rice Production, Area Harvested and Fertilizer Consumption

Source: Office of Agricultural Economics
Fertilizer Use by Crop (2011\textsuperscript{e})

- Rice: 44%
- Rubber: 24%
- Sugarcane: 8%
- Oil Palm: 9%
- Maize: 7%
- Cassava: 3%
- Others: 5%

Source: Office of Agricultural Economics

e = estimate

Nutrient Use by Crop (%) 2011\textsuperscript{e}

- N
  - Para rubber: 18%
  - Rice: 12%
  - Sugarcane: 6%
  - Fruits and vegetables: 5%
  - Others: 4%

- P\textsubscript{2}O\textsubscript{5}
  - Para rubber: 18%
  - Rice: 18%
  - Sugarcane: 7%
  - Fruits and vegetables: 11%
  - Others: 46%

- K\textsubscript{2}O
  - Para rubber: 29%
  - Rice: 33%
  - Sugarcane: 10%
  - Fruits and vegetables: 17%
  - Others: 11%

Source: Estimate from Office of Agricultural Economics and IFA
Fertilizer Demand and Supply (2008-2011)

Source: Office of Agricultural Economics

Fertilizer Importations in 2011

Share by country of origin

Share by product

Total Import: 5.64 Million Mt.

Source: Office of Agricultural Regulation, Department of Agricultures
Urea Imports

Share by country origin in 2011

<table>
<thead>
<tr>
<th>Country of origin</th>
<th>Percent share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saudi Arabia</td>
<td>41.7</td>
</tr>
<tr>
<td>Qatar</td>
<td>19.3</td>
</tr>
<tr>
<td>Malaysia</td>
<td>8.0</td>
</tr>
<tr>
<td>Kuwait</td>
<td>7.7</td>
</tr>
<tr>
<td>Oman</td>
<td>6.3</td>
</tr>
<tr>
<td>Others</td>
<td>17.1</td>
</tr>
</tbody>
</table>

Urea imports (‘000 tonnes)

Source: Office of Agricultural Regulation, Department of Agriculture

Agricultural Policies

- Improve the quality of farmer’s life
  - Make revenue to farmers
  - Knowledge of agriculture
  - Support the farmer institution
  - Make the database community

- Develop the capacity of agricultural production
  - Development of value-added agricultural products
  - Allocation of food and energy
  - Market development

- Agricultural Resources Development
  - Development of water resources, soil and fisheries
  - Regulates the use of agricultural chemicals
  - Promoting role of farmers to protect the resources

Source: Office of Agricultural Economics
Fertilizer Policies

- No Tax (Import)
- No Subsidies
- Farmer credit
- Increase use of organic fertilizer
- Fertilizer Act

Drivers Of Thailand Fertilizer Demand

<table>
<thead>
<tr>
<th>Positive</th>
<th>Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Increase income</td>
<td>• World economic crisis</td>
</tr>
<tr>
<td>• Increase production especially energy crops</td>
<td>• More frequency of disaster</td>
</tr>
<tr>
<td></td>
<td>• Limit of agricultural land</td>
</tr>
<tr>
<td></td>
<td>• Increase organic fertilizer and bio fertilizer</td>
</tr>
</tbody>
</table>
Thailand Fertilizer Consumption Trend Short to Medium-term Forecast (‘000 tonnes)

Source: FAO/Office of Agricultural Economics

Fertilizer Use Constraints

- Price increasing
- Political instability
- Risk from climate change
- Farmer attitude
Key Challenges

- Increasing productivity in limited land
- Integrated fertilizer management
- New fertilizer innovation that increased the quality of crops
- Farmer knowledge in soil fertility management

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Thank you for your attention.

Kob Khun Ka

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