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OUTLOOK FOR AGRICULTURE AND FERTILIZER DEMAND IN THAILAND



PERSENT BY

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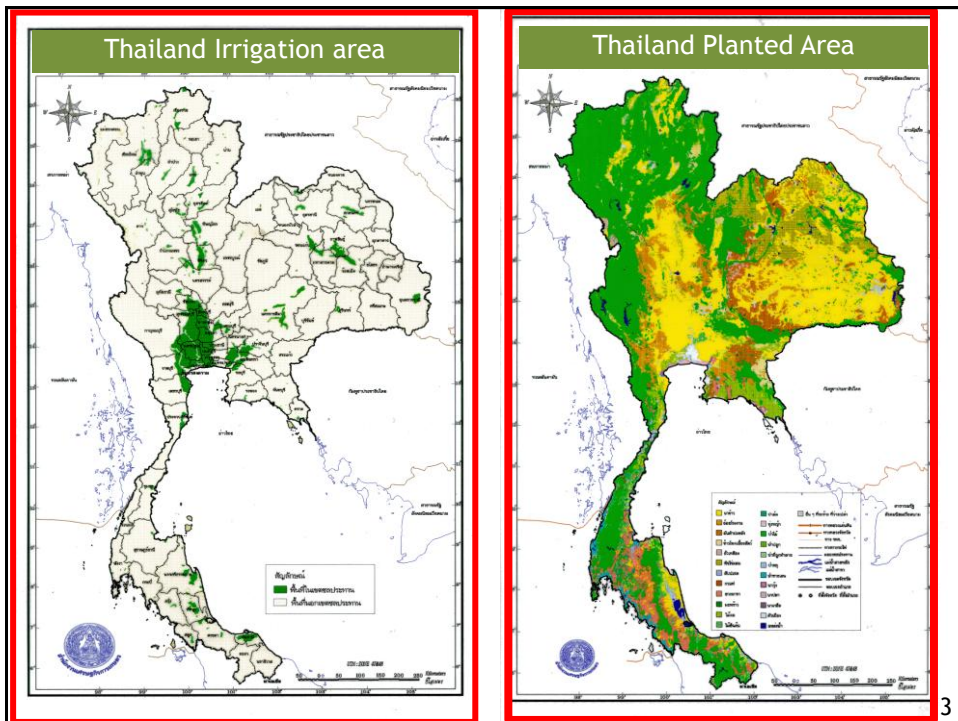
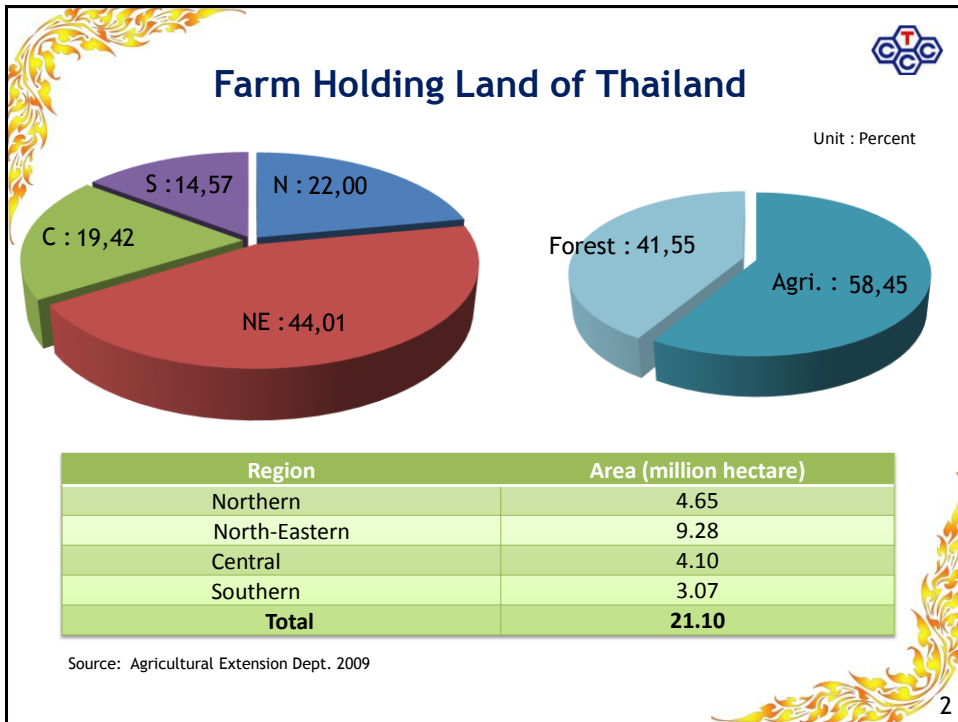


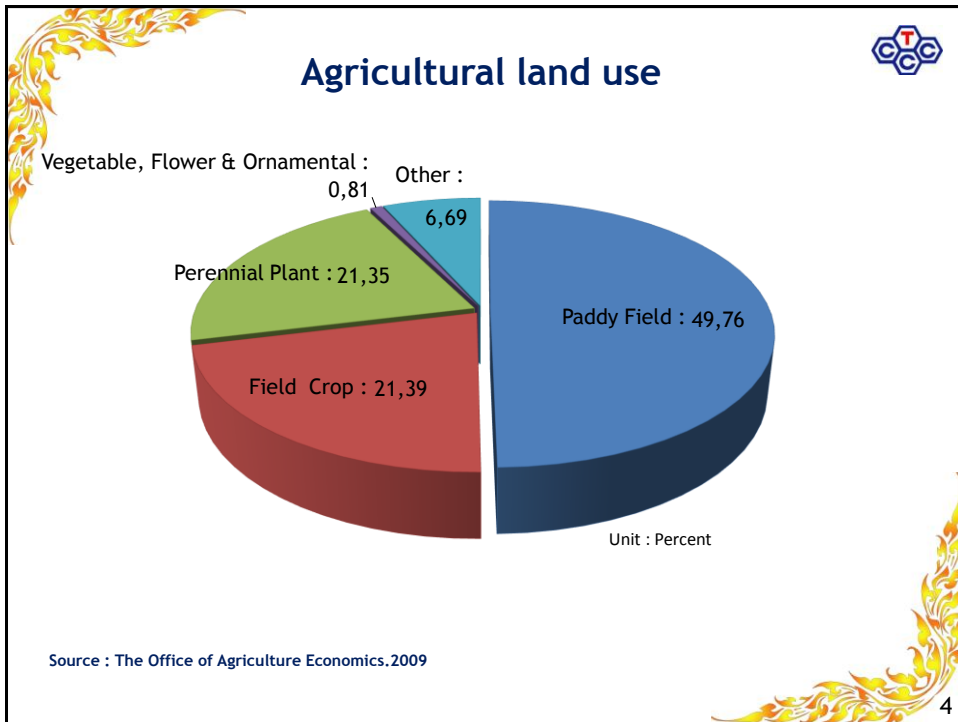
Growth rate of agriculture sector, 2009-2010

Unit : percent

Sector	2009	2010 ^f
Agriculture	-0.53	2.2-3.2
Crops	-1.56	2.0-3.0
Livestock	0.25	2.5-3.5
Fisheries	2.87	3.0-4.0
Forestry	-1.00	1.0-2.0
Agricultural Services	0.45	0.7-1.7

Source : Bureau of Agriculture Policy and Planning , Office of Agriculture Economics. 2010
f = forecast





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Thailand Planting Area of Cash Crops

Unit : million hectare

Crops	Planted area			Diff %
	2009	2010 ^E	2011 ^F	
First rice	9.19	9.20	9.13	10.76
Second rice	1.98	2.02	2.05	1.49
Maize	1.07	1.14	1.14	-
Cassava	1.37	1.20	1.10	-8.33
Sugarcane	0.96	1.05	1.10	4.76
Para rubber	2.67	2.76	2.84	2.90
Oil palm	0.58	0.62	0.65	4.84

Source : The Office of Agriculture Economics.2010
 E = Estimate
 F = Forecast

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Thailand Cash Crops Production



Crops	Production (million tons)			Diff (%)	
	2009	2010 ^E	2011 ^F	2009-2010	2010-2011
First rice	23.24	23.25	22.94	0.04	-1.33
Second rice	8.42	8.39	8.47	-0.36	0.96
Maize	4.25	4.62	4.49	8.71	-2.81
Cassava	30.09	22.01	21.06	-26.85	-4.32
Sugarcane	66.78	71.76	71.64	7.46	-0.17
Para rubber	3.17	3.09	3.16	-2.52	2.27
Oil palm	9.26	8.16	9.03	-11.88	10.66

Source : Center for Economic Information ;Office of Agricultural Economic.,2010
E = Estimate
F = Forecast

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Thailand Fertilizer Import : 2004-2010



Unit : Million Tons

Year	Fertilizer Import	Diff (%)
2006	3.53	6.53
2007	4.35	23.15
2008	3.79	-12.71
2009	3.87	1.83
2010 ^E	4.40	13.70

Source : Bureau of Agriculture Policy and Planning , Office of Agriculture Economics. 2009-2010
R&D Dept. Thai Central Chemical Public Company Limited
E= Estimate

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Thailand : Fertilizer Groups Imported 2007-2010

Unit : Million Tons

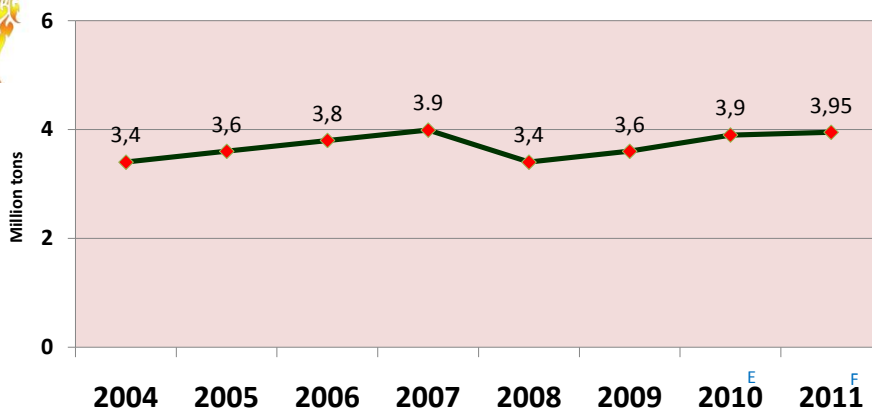
Group	2007	2008	2009	2009	2010	Diff (%)
				(Jan-Sep)	(Jan-Sep)	
TOTAL	4.35	3,79	3.87	2.99	4.15	38.80
SINGLE	2.88	2.65	2.91	2.41	2.98	23.65
UREA	1.69	1.62	2.31	1.93	1.82	- 5.70
NPK + NP	1.47	1.14	0.93	0.61	1.27	108.20

Source : Office of Agriculture Economics. 2010

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Thailand Fertilizer Consumption : 2004-2011



Source : Data base from Bureau of Agriculture Policy and Planning , Office of Agriculture Economics.2010
Analysis by R&D Dept. Thai central chemical public company limited.
E : Estimate, F : Forecast

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Thailand Fertilizer Consumption by Crops

Unit : Million Tons

Fert. Cons.		Rice	Maize	Sugarcane	Cassava	Oil Palm	Para Rubber	Other	Total
2009 ^E	Ton	1.96	0.20	0.24	0.16	0.15	0.32	0.57	3.60
	%	54.44	5.50	6.67	4.44	4.25	8.89	15.81	100
2010 ^F	Ton	2.07	0.20	0.30	0.15	0.23	0.43	0.52	3.90
	%	53.08	5.12	7.69	3.85	5.90	11.03	13.33	100

Source : Data base from The Office of Agriculture Economics, 2009
 Analysis by R&D Dept. Thai Central Chemical Public Company Limited
 E = Estimate F= Forecast

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Thailand Fertilizer Consumption (Nutrient) 2006-2011

Unit: thousand metric ton nutrients

Year	N	P ₂ O ₅	K ₂ O	Total	Diff (%)
2007	1,037	333	342	1,712	4.85
2008	932	297	365	1,595	-6.84
2009	1,228	240	165	1,633	2.41
2010 ^E	1,210	260	310	1,780	9.00
2011 ^F	1,195	270	325	1,790	0.56

Source : Data base from The Office of Agriculture Economics, 2009
 Analysis by R&D Dept. Thai Central Chemical Public Company Limited
 E = Estimate F= Forecast

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Thailand Fertilizer Consumption (Nutrient) by cash crop

Unit: thousand metric ton nutrients

Crops	Year	N	P ₂ O ₅	K ₂ O	Total
Rice	2010 ^E	326.8	54.0	2.61	383.4
	2011 ^F	342.6	61.0	3.20	406.8
	%	4.85	13.00	22.23	6.12
Maize	2010 ^E	11.7	2.9	1.0	15.6
	2011 ^F	13.6	3.6	1.2	18.4
	%	16.1	24.79	19.96	17.90
Sugarcane	2010 ^E	11.1	8.3	6.2	25.6
	2011 ^F	13.0	9.6	7.2	29.8
	%	16.50	15.87	17.67	16.60

Source : Data base from The Office of Agriculture Economics, 2009
Analysis by R&D Dept., Thai Central Chemical Public Company Limited
E = Estimate F= Forecast

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Thailand Fertilizer Consumption (Nutrient) by cash crop

Unit: thousand metric ton nutrients

Crops	Year	N	P ₂ O ₅	K ₂ O	Total
Cassava	2010 ^E	22.0	13.0	14.9	49.9
	2011 ^F	18.5	10.7	15.6	44.8
	%	-15.88	-17.49	4.60	-10.20
Oil palm	2010 ^E	13.2	0.6	13.4	27.2
	2011 ^F	14.6	0.7	15.1	30.3
	%	10.60	15.32	12.69	11.50
Para rubber	2010 ^E	225.6	91.9	95.6	413.1
	2011 ^F	267.1	111.6	113.9	493.6
	%	11.79	17.29	8.80	19.24

Source : Data base from The Office of Agriculture Economics, 2009
Analysis by R&D Dept., Thai Central Chemical Public Company Limited
E = Estimate F= Forecast

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Factors affecting fertilizer consumption in Thailand



World Economics:

The situation of world economics fluctuation such as price of cash crops ,crude oil price etc.

Regulatory and Policy:

After the amending of fertilizer act 2007 and implementation, not only chemical fertilizer but bio-fertilizer, organic fertilizer and organic chemical fertilizer were controlled by the new act. The implementation of the fertilizer act will motivate the improvement of fertilizer quality in Thailand. For long run the crop production will increase follow with more fertilizer demand

The policy of department of internal trade ,Ministry of commerce to control fertilizer price may partially limit the growth rate of fertilizer marketing in the short period.

Climate:

The global warming and drought weather will reduce the capability of the grower in many planting area because of water shortage and the wide spread damage by insect and plant disease.

