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## Outlook for agriculture and fertilizer market in Thailand

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Outlook for agriculture and fertilizer market in Thailand

## Outlook for agriculture and fertilizer market in Thailand

1. Agriculture Economic Situation
2. Agriculture in Thailand
3. Fertilizer Market ; Fertilizer import, Fertilizer consumption
4. Factor affecting fertilizer market in Thailand

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## Outlook for agriculture and fertilizer market in Thailand

## Growth rate of agriculture sector, 2013-2014

Sector	2013	Jan-June 2014	Jan-Dec 2014
<b>Agriculture</b>	<b>1.1</b>	<b>0.8</b>	<b>2.1-3.1</b>
<b>Crops</b>	<b>3.0</b>	<b>1.5</b>	<b>2.5-3.5</b>
Livestock	1.3	2.3	1.5-2.5
Fisheries	-7.2	-3.3	(-0.5)-0.5
Forestry	1.1	0.9	0.8-1.8
Agricultural Services	3.8	-1.0	1.5-2.5

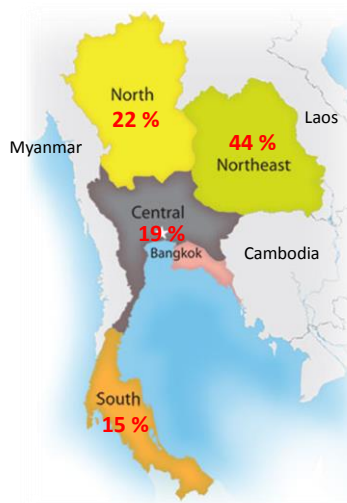
Source : Bureau of Agriculture Policy and Planning , Office of Agriculture Economics.

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## Agriculture in Thailand

Region	Area (Hectare)
Northern	4.65
North-Eastern	9.28
Central	4.10
Southern	3.07
<b>Whole Kingdom</b>	<b>21.10</b>

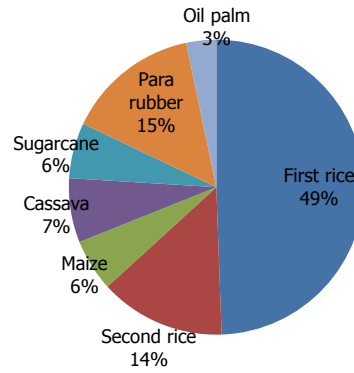
Source : Office of Agriculture Economics.



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Thailand Planting Area of Cash Crops

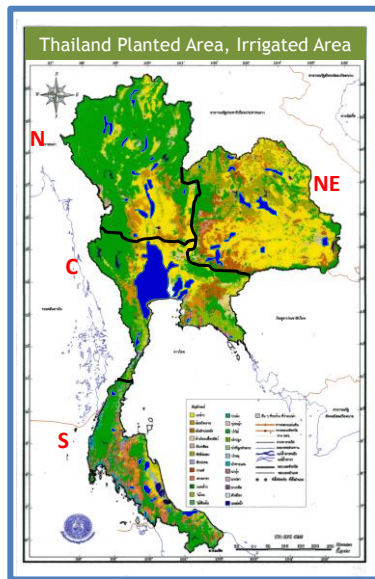
Crops	Planted Area		DIFF %
	2013	2014	
First rice	10.39	10.40	0.01
Second rice	2.90	2.57	- 11.38
Maize	1.20	1.21	0.83
Cassava	1.48	1.45	2.03
Sugarcane	1.28	1.32	3.13
Para rubber	3.08	3.55	15.30
Oil palm	0.69	0.63	- 8.70



Source : Office of Agriculture Economics.

Unit : Million Hectare

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■ Irrigated Area  
■ Paddy Field

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## Thailand Major rice and Second rice production

Type of Rice	Production (Million Tons)			Production per Hectare (Kg.)		
	2011/12	2012/13	2013/14*	2011/12	2012/13	2013/14*
<b>Major Rice</b>	<b>25.87</b>	<b>27.23</b>	<b>28.02</b>	<b>2,476</b>	<b>2,621</b>	<b>2,694</b>
Irrigated area	7.95	8.62	9.63	3,093	3,328	3,676
Non-Irrigated area	17.92	18.61	18.39	2,277	2,386	2,364
<b>Second Rice</b>	<b>12.24</b>	<b>10.77</b>	<b>10.23</b>	<b>4,221</b>	<b>4,191</b>	<b>4,028</b>
Irrigated area	7.84	7.38	6.95	4,380	4,316	4,187
Non-Irrigated area	4.40	3.39	3.28	4,000	3,942	3,770
<b>Total</b>	<b>38.11</b>	<b>38.00</b>	<b>38.25</b>			

Source : Office of Agriculture Economics.

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Rice : Harvested area, production and yield of major countries  
2010/11 - 2012/13

Countries	Harvested area (1,000 hectare)			Production (1,000 tons)*			Yield per hectare		
	2010/11	2011/12	2012/13	2010/11	2011/12	2012/13	2010/11	2011/12	2012/13
<b>World Total</b>	<b>157,510</b>	<b>159,461</b>	<b>157,480</b>	<b>449,090</b>	<b>465,820</b>	<b>469,510</b>	<b>4,250</b>	<b>4,306</b>	<b>4,450</b>
China	29,870	30,061	30,141	137,000	140,700	143,000	6,550	6,688	6,781
India	42,861	44,101	42,410	95,980	105,310	104,400	3,363	3,581	3,688
Indonesia	12,080	12,160	12,190	35,500	36,500	36,550	4,669	4,731	4,719
Bangladesh	11,701	11,720	11,650	31,700	33,700	33,820	4,063	4,313	4,350
Viet Nam	7,610	7,741	7,861	26,370	27,150	27,700	5,550	5,613	5,638
<b>Thailand **</b>	<b>12,120</b>	<b>11,957</b>	<b>11,957</b>	<b>23,564</b>	<b>25,147</b>	<b>25,080</b>	<b>2,944</b>	<b>3,188</b>	<b>3,181</b>
Philippines	4,530	4,581	4,701	10,540	10,710	11,430	3,688	3,713	3,863
Myanmar	7,000	6,501	6,350	10,530	10,820	10,670	2,350	2,600	2,619

Source : United States Department of Agriculture  
 Remark : \*\* Update by Office of Agricultural Economics  
 \* Milled rice  
 Date at Feb., 2014

## Outlook for agriculture and fertilizer market in Thailand

**Fertilizer consumption (Kilograms per hectare of arable land)**

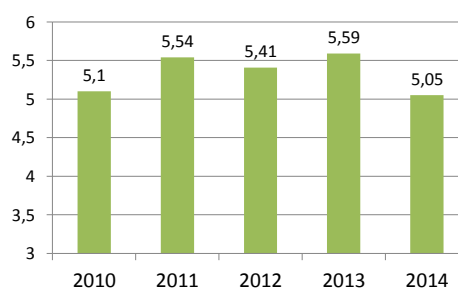
Country	2010	2011	2012
China	579.9	558.3	647.6
Indonesia	181.5	198.4	194.8
Vietnam	323.3	311.5	297.1
Philippines	148.6	132.9	113.5
<b>Thailand</b>	<b>162.2</b>	<b>161.5</b>	<b>153.2</b>
India	179.1	177.9	163.7

Source : world bank, <http://data.worldbank.org/indicator/AG.CON.FERT.ZS>

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**Thailand Fertilizer Import : 2010-2014**

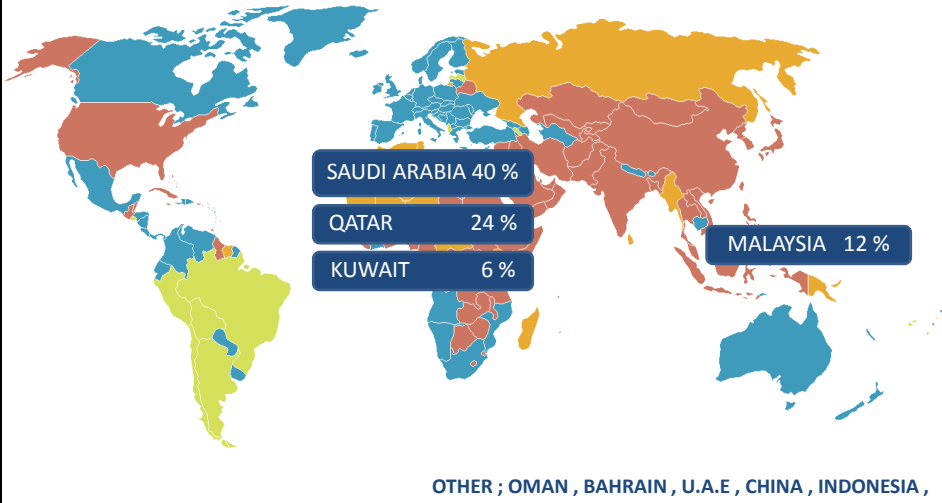
year	Fert. Import	Diff (%)
2010	5.10	
2011	5.54	8.63
2012	5.41	-2.35
2013	5.59	3.33
2014 <sup>F</sup>	5.05	-10.5



Source : Office of Agriculture Economics.

Outlook for agriculture and fertilizer market in Thailand

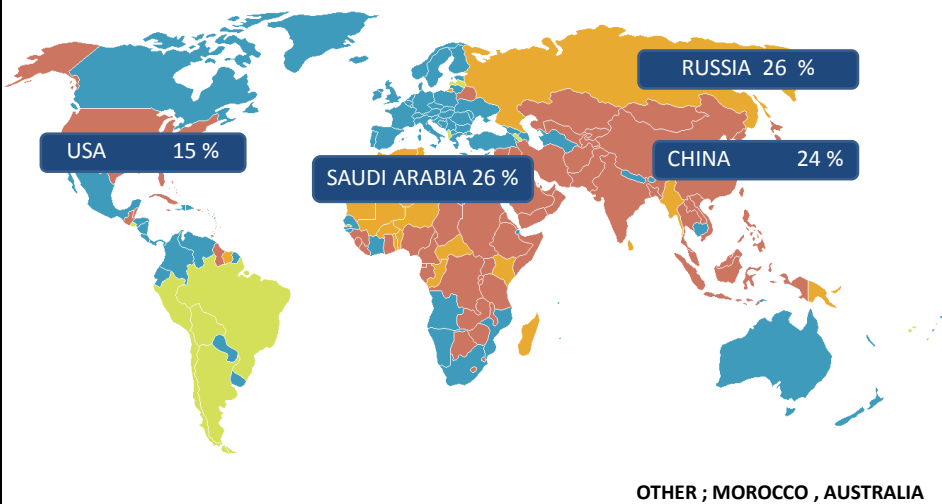
Thailand Fertilizer Import 2013 : UREA 2.17 Million Tons



Source : Office of Agriculture Economics.

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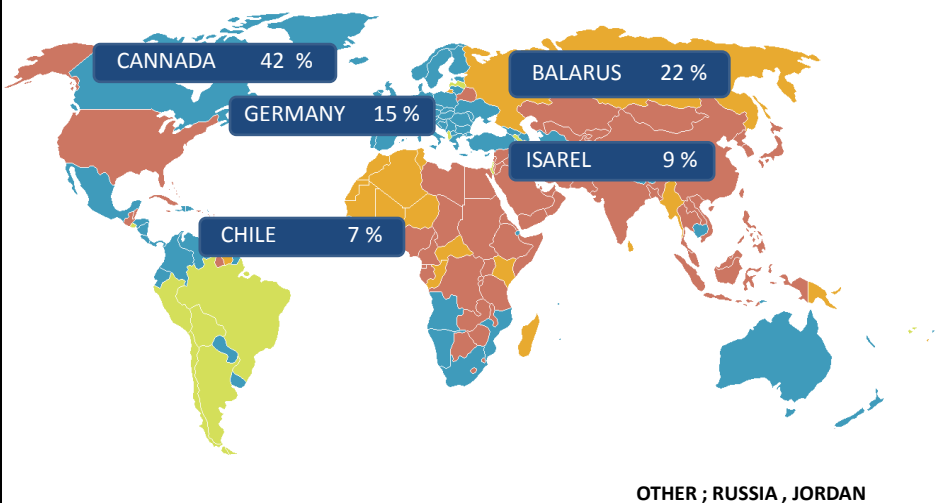
Thailand Fertilizer Import 2013 : DAP 0.55 Million Tons



Source : Office of Agriculture Economics.

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## Thailand Fertilizer Import 2013 : MOP 0.64 Million Tons



Source : Office of Agriculture Economics.

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## Outlook for agriculture and fertilizer market in Thailand

Thailand : Fertilizer Groups Imported 2010-2014<sup>F</sup>

Unit : Million Tons

Group	2010	2011	2012	2013	2014 <sup>F</sup>	DIFF % 2013/2014 <sup>F</sup>
<b>TOTAL</b>	<b>5.11</b>	<b>5.46</b>	<b>5.41</b>	<b>5.59</b>	<b>5.05</b>	<b>-10.0</b>
<b>SINGLE</b>	<b>3.59</b>	<b>3.62</b>	<b>3.68</b>	<b>3.69</b>	<b>3.35</b>	<b>-9.0</b>
UREA	2.11	2.04	2.13	2.17	2.00	-7.8
AS	0.35	0.35	0.38	0.26	0.20	-23.0
DAP	0.53	0.40	0.55	0.55	0.50	-9.0
MOP	0.51	0.74	0.54	0.64	0.60	-6.25
OTHER	0.09	0.09	0.08	0.07	0.05	-29.0
<b>NPK + NP</b>	<b>1.52</b>	<b>1.84</b>	<b>1.73</b>	<b>1.90</b>	<b>1.70</b>	<b>-10.5</b>

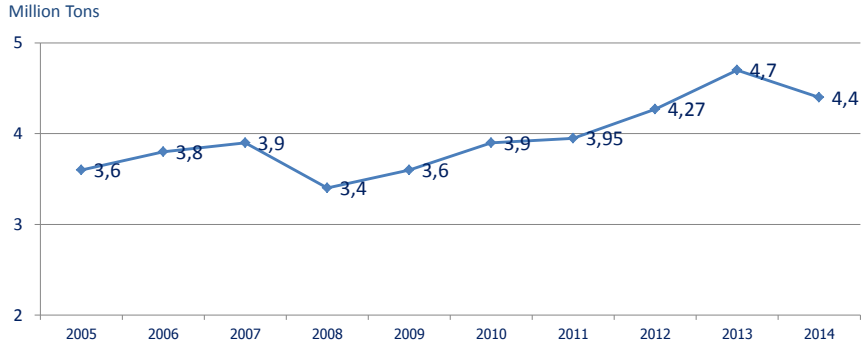
Source : Office of Agriculture Economics. 2014

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Thailand Fertilizer Consumption : 2005-2014



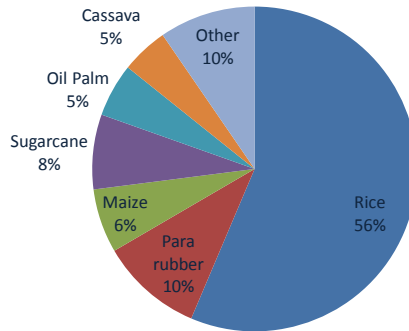
Source : Data base from Bureau of Agriculture Policy and Planning , Office of Agriculture Economics. 2014  
 Analysis by R&D Dept. Thai central chemical public company limited.

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Thailand Fertilizer Consumption  
 by cash crop

Unit: M Ton

Crops	Fert. Cons
Rice	2.65
Para rubber	0.48
Maize	0.30
Sugarcane	0.35
Oil Palm	0.25
Cassava	0.22
Other	0.45
<b>Grand Total</b>	<b>4.70</b>



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



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### Thailand Fertilizer Consumption (Nutrient) 2010-2014

Unit: thousand metric ton nutrients

Year	N	P <sub>2</sub> O <sub>5</sub>	K <sub>2</sub> O	Total	Diff (%)
2010	1,310	301	310	1,921	-
2011	1,386	389	360	2,135	11
2012	1,390	400	370	2,160	1
2013	1,480	493	447	2,420	12
2014 <sup>F</sup>	1,420	430	420	2,270	-6.20

Source : Data base from The Office of Agriculture Economics. 2014  
 Analysis by R&D Dept. Thai Central Chemical Public Company Limited  
 F= Forecast

## Outlook for agriculture and fertilizer market in Thailand

### Factors affecting fertilizer consumption in Thailand

**Economics**

**Government Policy**

**Climate Problems**



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**Thank You**

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