



# GIEWS Country Brief Thailand

Reference Date: 10-November-2021

## FOOD SECURITY SNAPSHOT

- Paddy output forecast close to average in 2021
- Rice exports in 2021 barely improved
- Prices of rice steadily decreased since February 2021

## Paddy output forecast close to average in 2021

Harvesting of the 2021 main (mostly rainfed) paddy crop, accounting for about 70 percent of annual output, started in early October in the northern region and central plains and will finalize next January in southern parts of the country. Prospects for this crop were boosted by generally favourable weather conditions prevailing between May and August in the main producing northern and northeastern parts of the country, with adequate water supplies also favouring cultivation in (mostly) irrigated central plains. However, floods across numerous provinces between September and October negatively affected main crops just as they were reaching the harvest stage. Pending assessments of damages incurred and considering the scope for some of these losses to be recovered through the secondary (irrigated) crop, to be planted from next January, total paddy production in 2021 is forecast at an average level of 31.6 million tonnes.

The 2021 main maize crop was harvested between July and September, while the secondary crop is growing under generally favourable weather conditions and will be harvested next February. The aggregate 2020 maize production is forecast at an average level of 4.8 million tonnes. The total area planted in 2021 was below average as farmers switched maize land to more profitable sugarcane and cassava crops. Overall, yields are forecast above the average due to generally favourable weather conditions.

## Rice exports in 2021 barely improved

In calendar year 2021, rice exports are forecast at 6.0 million tonnes, close to the 2020 depressed level, due to strong competition with other suppliers and demand disruptions caused by high shipping costs.

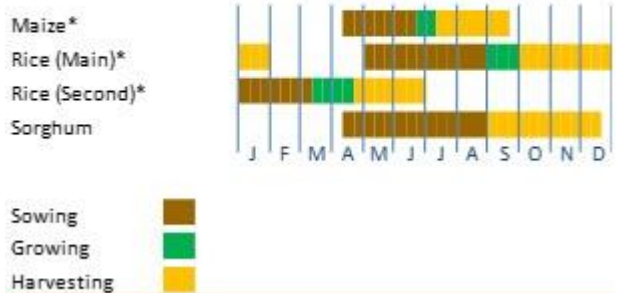
## Prices of rice steadily decreased since February 2021

Domestic prices of rice have steadily decreased since February 2021 and, last September, they were about 20 percent

## Thailand

Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS.

## Thailand

### Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Rice (paddy)	31 121	29 885	31 600	5.7
Maize	4 717	4 805	4 802	-0.1
Cereals NES	94	94	94	0.0
Others	88	90	91	1.1
<b>Total</b>	<b>36 021</b>	<b>34 874</b>	<b>36 587</b>	<b>4.9</b>

Note: percentage change calculated from unrounded data.

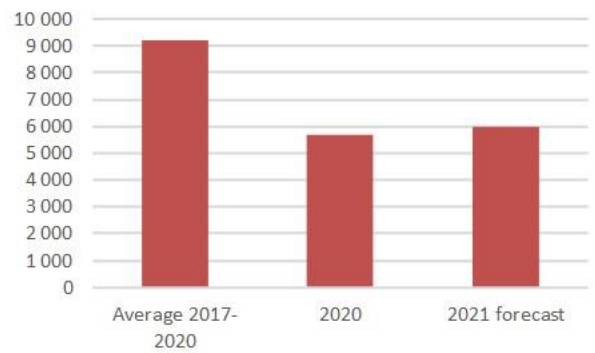
Source: FAO/GIEWS Country Cereal Balance Sheet.

below their year-earlier levels due to improved local availabilities and weak demand for export.

## Thailand

### Rice Exports

000 tonnes



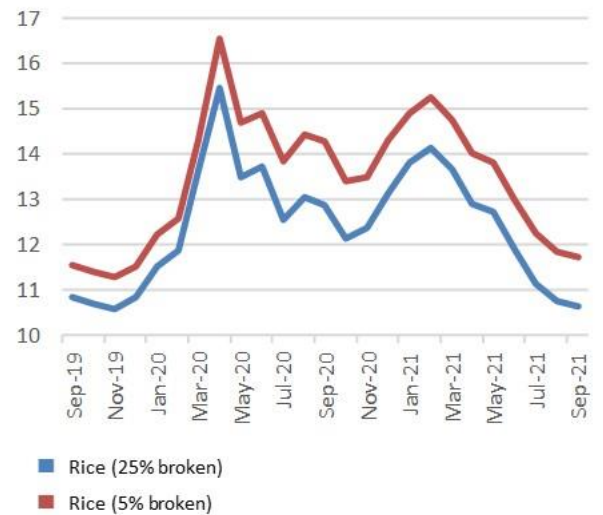
Note: Rice in milled terms.

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Thailand

### Wholesale rice prices in Bangkok

Baht per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



# GIEWS Country Brief Thailand

Reference Date: 16-December-2020

### FOOD SECURITY SNAPSHOT

- Aggregate 2020 rice production forecast at below-average level
- Rice exports in 2020 forecast to contract compared with 2019 level
- Prices of rice decreased between May and October 2020, but remain above year-earlier levels

## Aggregate 2020 rice production forecast at below-average level

Harvesting of the 2020 main (mostly rainfed) paddy crop, accounting for about 70 percent of the annual output, started in October and will finalize next January. The May-October rainy (monsoon) season was characterized by an erratic temporal and spatial distribution. In the main rice producing areas in the northeastern and northern parts of the country, despite being below average, the cumulative monsoon precipitation amounts exceeded the level of 2019. Improved rainfall, coupled with fewer flood-related crop losses, is estimated to have facilitated near-average yields. In the central plains, where most of the paddy is irrigated, low availability of irrigation water, led to a reduction in the area planted. The 2020 secondary (irrigated) crop will be planted from early January and low irrigation water availabilities is likely to constrain planted area to below-average levels. Overall, the 2020 aggregate paddy output is forecast at 29.4 million tonnes, 4 percent below the five-year average and slightly above the 2019 level, when prolonged dry weather conditions reduced production of both main and secondary crops.

Harvesting of the 2020 main crop in nearing completion and the output is estimated at an above-average level, mostly reflecting large plantings, supported by the strong demand from the local feed industry. Weather conditions at critical growing stages were generally favourable and benefitted yields. The 2020 secondary maize crop, for harvest next February, is growing under generally favourable weather conditions. Overall, the aggregate 2020 maize production is forecast at an above-average level of 4.8 million tonnes.

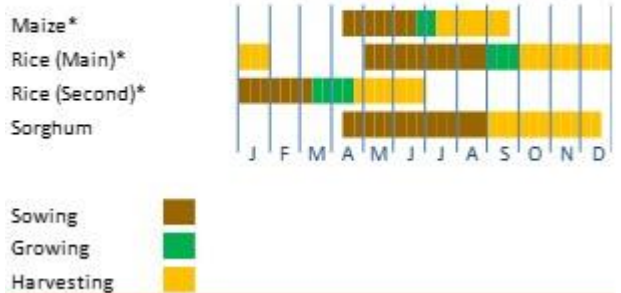
## Rice exports in 2020 forecast well below average

In calendar year 2020, rice exports are forecast at 5.6 million tonnes, 26 percent below the 2019 level.

### Thailand

Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS.

### Thailand

#### Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Rice (paddy)	30 562	28 282	29 360	3.8
Maize	4 678	4 309	4 818	11.8
Cereals NES	94	94	94	0.0
Others	86	86	86	0.0
<b>Total</b>	<b>35 420</b>	<b>32 771</b>	<b>34 358</b>	<b>4.8</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

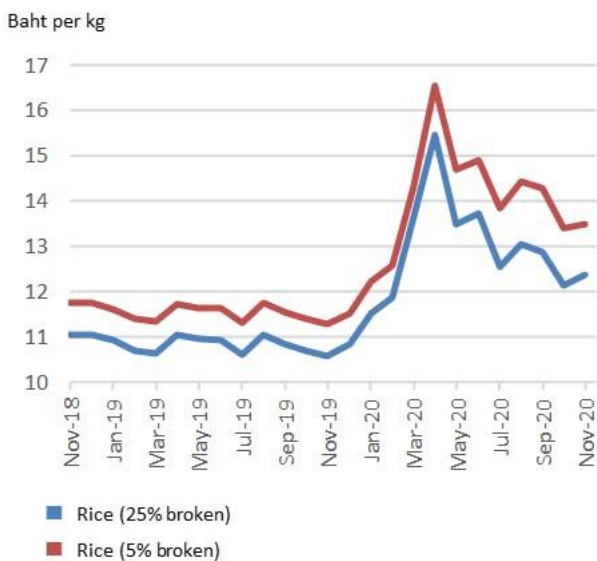
## Prices of rice decreased between May and October 2020, but remain above year-earlier levels

Domestic prices of rice registered sharp increases between January and April 2020, supported by the reduced output in 2019 and the strong domestic demand at the onset of the COVID-19 pandemic. Subsequently, prices decreased by around 20 percent between April and October 2020, reflecting adequate market availabilities and muted demand for exports. In November 2020, prices of rice registered small increases and were well above their year-earlier levels.

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## Thailand

### Wholesale rice prices in Bangkok



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



## GIEWS Country Brief Thailand

Reference Date: 24-April-2020

### FOOD SECURITY SNAPSHOT

- Below-average rice production in 2019 due to dry weather conditions
- Rice exports in 2020 forecast well below average
- Prices of rice in March were at highest levels since July 2013

### Below-average rice production in 2019 due to dry weather conditions

Harvesting of the 2019 main season paddy crop was completed in January 2020, while the secondary (irrigated) season crop will be harvested between late April and June. Production of the main season crop is officially estimated at 24.3 million tonnes, 3 percent below the five-year average. Although the area planted has reached above-average levels, dry spells and flooding caused crop losses, leading to a reduction in the area harvested as well as yields. The secondary season is forecast by FAO at 4.1 million tonnes, more than 30 percent below the five-year average, owing to critically low water supplies for irrigation, which coupled with well below-average rains between January and March, when most plantings normally take place, hindered and aborted sowing operations. As of late March, the Vegetation Health Index, which captures the drought effect on crop and vegetation growth, shows negative anomalies in the lower northern region and the upper central plains (see VHI map), raising concerns of yield reductions. As a result of the unfavourable weather, aggregate paddy output in 2019 is forecast at 28.4 million tonnes, 10 percent below the five-year average.

Harvesting of the 2019 secondary season maize crop is ongoing, while the main crop has been harvested by September last year. The aggregate 2019 maize production is forecast at a below-average level of 4.7 million tonnes, mostly reflecting the negative effects of dry weather conditions. Some crop losses are due to Fall Armyworm infestations, which mainly affected the northern and northeastern parts of the country.

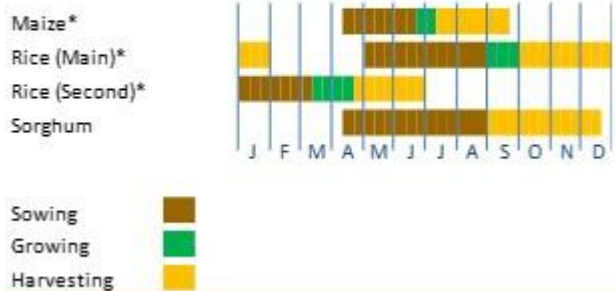
### Rice exports in 2020 forecast well below average

In calendar year 2020, rice exports are forecast at 7.0 million tonnes, almost 30 percent below the five-year average, mainly due to reduced exportable availabilities following the below-average 2019 paddy output.

### Thailand

Crop Calendar

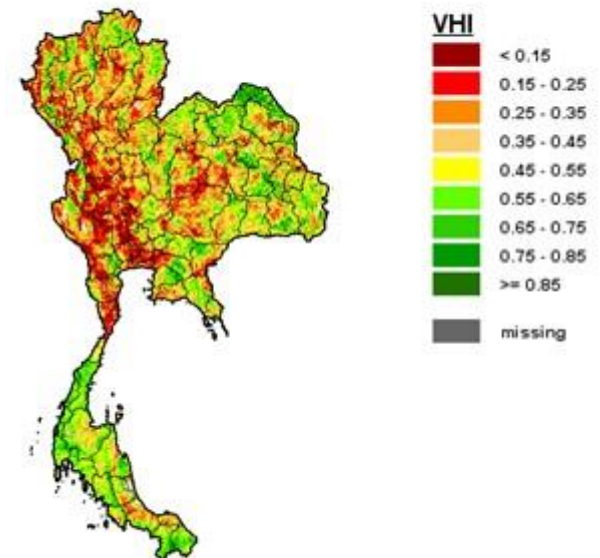
(\*major foodcrop)



Source: FAO/GIEWS.

### Thailand - Vegetation Health Index (VHI)

March 2020



Source: FAO/GIEWS Earth Observation System.

## Prices of rice in March were at highest levels since July 2013

Domestic prices of rice have been increasing sharply between November 2019 and March 2020, on expectations of a sharply reduced 2019/20 secondary crop. Overall, prices in March were at their highest levels since July 2013.

### COVID-19 and measures adopted by the Government

By mid-April 2020, the country had not yet formally ordered a lockdown, but a nationwide curfew has been imposed from 22:00 to 04:00 starting from 3 April 2020. Previously, on 17 March, the Government adopted restrictions on international travel, postponement of major holidays and the nationwide closure of schools and universities. Agricultural activities are authorized to continue operating.

On 3 April 2020, the Government approved a relief package of THB 135 billion (USD 4.13 billion) to grant financial aid to 9 million people whose livelihoods have been adversely affected by the virus. The Government also announced plans to distribute 34 000 tonnes of paddy seeds throughout April in order to ensure the timely planting of the 2020 main season between May and August.

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## Thailand

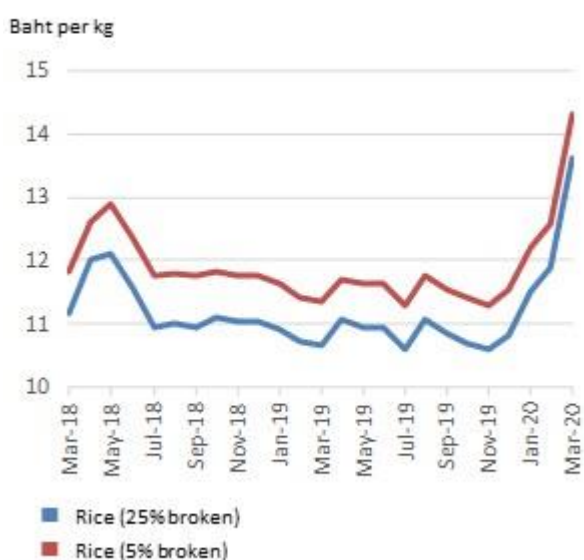
### Cereal Production

	2014-2018	2018	2019	change
	average		forecast	2019/2018
000 tonnes				
Rice (paddy)	31 229	32 348	28 400	-12.2
Maize	4 762	5 035	4 734	-6.0
Cereals NES	94	94	94	0.0
Others	85	99	86	-13.4
<b>Total</b>	<b>36 170</b>	<b>37 576</b>	<b>33 314</b>	<b>-11.3</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheet.

## Thailand

### Wholesale rice prices in Bangkok



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



## GIEWS Country Brief Thailand

Reference Date: 27-March-2019

### FOOD SECURITY SNAPSHOT

- Paddy production in 2018 forecast near average level
- Rice exports forecast in 2019 at below-average level
- Prices of rice declined in past two months due to improved market supplies

### Paddy production in 2018 forecast near average level

Planting of the 2018 secondary paddy crop, to be harvested between May and June 2019, is about to be finalized, while harvesting of the 2018 main paddy crop was completed in January 2019. Rains were generally poor and erratic from May to November 2018 over central, northern and northeastern regions, curbing plantings and lowering yields of the main paddy crop. Planted area with the 2018 secondary paddy crop is forecast to decline to average levels, following Government's incentives encouraging farmers to switch from off-season rice to maize cultivation, amid scanty rains since January 2019. The acreage contractions are mainly expected in non-irrigated areas, as sufficient irrigation water supplies and remunerative prices of rice limited the decreases in the irrigated areas. Overall, the 2018 aggregate paddy output is officially forecast at 32.1 million tonnes, 4 percent below the high level in 2017 but near the five-year average, mainly reflecting the above-mentioned reductions in the planted area for the main and secondary crops.

Harvesting of the 2018 maize crop was concluded in September 2018. The 2018 maize output is officially estimated at 5 million tonnes, reflecting an increase in plantings due to remunerative farm gate prices and average yields.

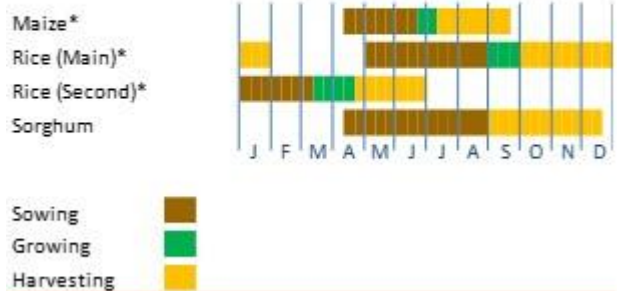
### Rice exports forecast in 2019 at below-average level

In calendar year 2019, rice exports are forecast at 9.3 million tonnes, about 16 percent below the previous year's near average level. The expected annual decrease mainly results from a stronger local currency, which has lowered the competitiveness of Thai rice in the international market.

### Thailand

Crop Calendar

(\*major foodcrop)



Source: FAO/GIEWS.

### Thailand

#### Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Rice (paddy)	32 344	33 487	32 085	-4.2
Maize	4 741	4 874	5 003	2.6
Cereals NES	94	94	94	0.0
Others	73	69	89	28.9
<b>Total</b>	<b>37 252</b>	<b>38 524</b>	<b>37 271</b>	<b>-3.3</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

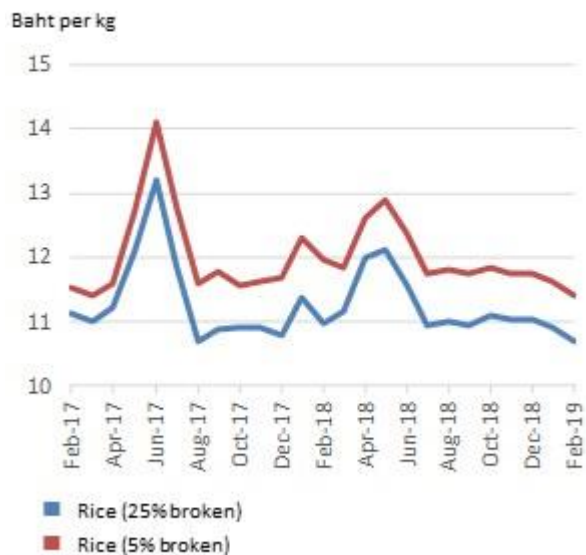
## Prices of rice declined in past two months due to improved market supplies

Prices of rice declined for the second consecutive month in February, due to improved market availabilities from the recently concluded 2018 main season harvest. Overall, prices of rice in February 2019 were about 4 percent below their year earlier values.

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### Thailand

#### Wholesale rice prices in Bangkok



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.





# GIEWS Country Brief Thailand

**Reference Date: 23-October-2018**

### FOOD SECURITY SNAPSHOT

- **Paddy production in 2018 forecast at above-average level**
- **Rice exports in 2018 forecast to decrease from previous year's record level, but remain high**
- **Prices of rice stabilized after several months of downward pressure**

## Paddy production in 2018 forecast at above-average level

Harvesting of the 2018 main paddy crop started in early October and is expected to be finalized in January 2019. According to satellite-based estimates, seasonal rains from May to September 2018 have been generally above average in northern and northeastern parts of the country, where the bulk of the paddy crop is concentrated. Excessive rains triggered localized floods in July and August in some rice producing areas located in the northeastern region, including the districts of Nakhon Phanom, Roi Et and Sakon Nakhon. The floods, however, had a limited impact on rice production as water receded quickly from paddy fields. In the central plains, where most of the paddy is irrigated, adequate irrigation water supplies ensured average growing conditions. Overall, the 2018 aggregate paddy output (including the secondary crop to be harvested between next April and June) is forecast at 34.5 million tonnes, slightly higher than the previous year's above-average level, mostly reflecting an expansion in plantings of main season crops due to remunerative producer prices.

The bulk of the 2018 maize crop was harvested between July and September. The maize output is officially estimated at a record level of 5 million tonnes, reflecting an increase in plantings due to remunerative farmgate prices and higher yields following favourable weather conditions.

## Rice exports in 2018 to decrease from previous year's record level, but remain high

In calendar year 2018, rice exports are forecast at 10.8 million tonnes, 7 percent below last year's record level, but still 10 percent above the five-year average. The year-on-year decrease is due to a reduction in exports of fragrant rice associated to tight domestic supplies, following strong sales abroad since 2015. Overall, over the past five years, deliveries of fragrant rice accounted for 20 percent of total rice exports.

### Thailand

Crop Calendar

(\*major foodcrop)



Sowing  
Growing  
Harvesting

Source: FAO/GIEWS.

### Thailand

#### Cereal Production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Rice (paddy)	32 376	33 650	34 460	2,4
Maize	4 741	4 874	5 003	2,6
Others	73	69	89	28,9
<b>Total</b>	<b>37 284</b>	<b>38 687</b>	<b>39 647</b>	<b>2,5</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheet.

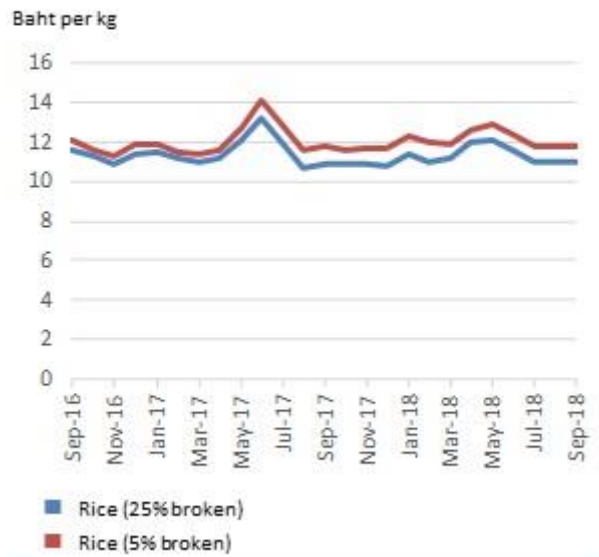
## Prices of rice stabilized after several months of downward pressure

Domestic prices of rice decreased by about 10 percent between May and July 2018 as the output of the secondary harvest improved market supplies. Subsequently, prices levelled off in August and September as the downward pressure from the recently started 2018 main season harvest was offset by Government-to-Government sales to China and increased demand from the Philippines. Overall, prices of rice in September 2018 were close to their year-earlier levels.

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## Thailand

### Wholesale rice prices in Bangkok



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



## GIEWS Country Brief Thailand

Reference Date: 19-June-2018

### FOOD SECURITY SNAPSHOT

- Near average rains and adequate irrigation water availability benefit planting operations of 2018 main crops
- Aggregate paddy production in 2017 forecast slightly above average
- Rice exports in 2018 forecast to decline from previous year's record level
- Prices of rice on increase supported by strong import demand

### Near average rains and adequate irrigation water availability benefit planting operations of 2018 main crops

The 2018 main paddy and maize crops are currently being planted. Rainfall since mid-April has been near average throughout most of the country and, coupled with adequate irrigation water availability, it benefitted planting operations and early crop development. Overall, the area planted with both crops is expected to expand, supported by remunerative farm gate prices and adequate water availability in the main reservoirs.

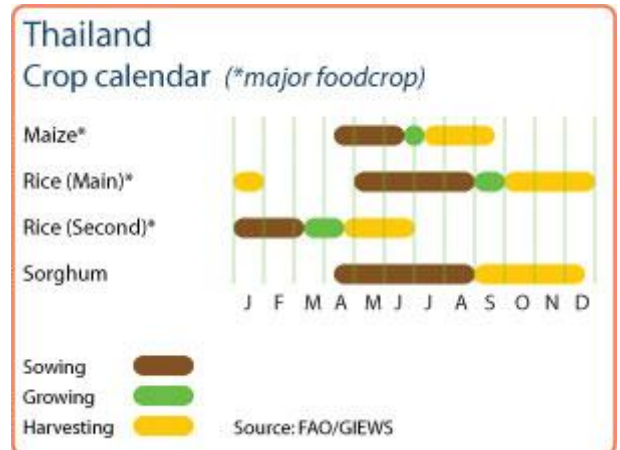
### Paddy production in 2017 forecast to increase

Harvesting of the 2017 main paddy crop was concluded in January 2018, while the harvest period for the minor (secondary) paddy crop is underway and is expected to conclude at the end of June. Despite the crop losses caused by floods in July 2017 in the northeastern farming region, the 2017 aggregate paddy output is forecast at 33.7 million tonnes, 4 percent above the 2016 level. The projected year-on-year increase mirrors expectations of higher secondary crop production, reflecting an expansion in plantings as a result of attractive producer prices and supported by ample availability of water for irrigation.

The production of the 2017 maize crop, with the bulk harvested by September 2017, is officially estimated at 4.9 million tonnes, slightly above the average level. The increase is mostly the result of an expansion in plantings owing to sustained strong demand from the feed industry.

### Rice exports in 2018 forecast to decrease from previous year's record level

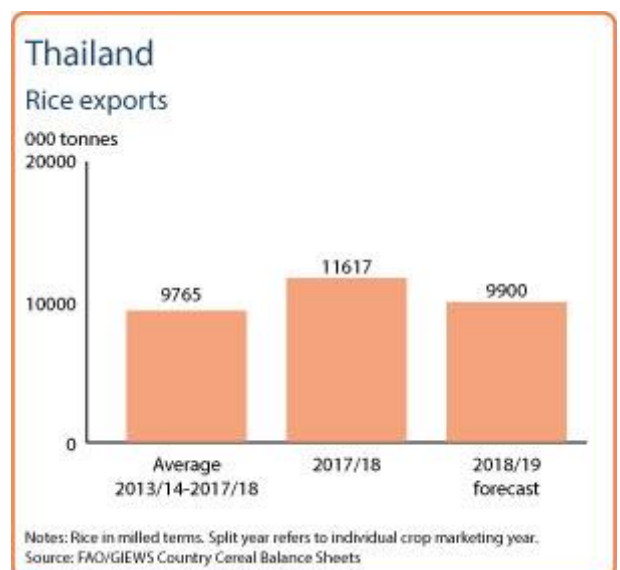
Rice exports in calendar year 2018 are forecast at 9.9 million tonnes, 15 percent below last year's record level.



**Thailand**  
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Rice (paddy)	33 246	32 431	33 650	4
Maize	4 747	4 569	4 874	7
Cereals nes	94	94	94	0
Others	73	73	69	-5
<b>Total</b>	<b>38 161</b>	<b>37 167</b>	<b>38 687</b>	<b>4</b>

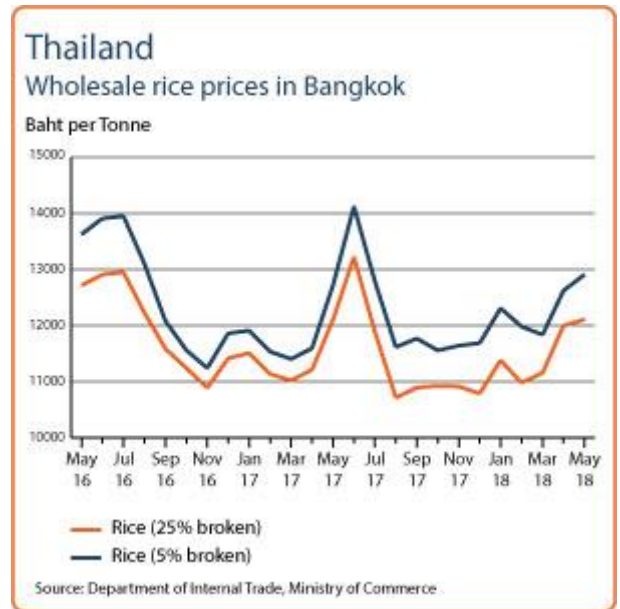
Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets



## Rice prices on increase supported by strong demand for exports

Domestic rice prices have generally increased since March 2018, reflecting strong demand from importing countries. The improved supplies in the market from the secondary crop harvest, estimated at a good level, limited further price increases. Overall, prices of rice in May were close to their year-earlier levels.

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## GIEWS Country Brief Thailand

Reference Date: 15-September-2017

### FOOD SECURITY SNAPSHOT

- **Aggregate paddy production in 2017 forecast to increase from last year's good level**
- **Rice exports in 2017 are forecast to increase to a three-year high**
- **After several months of strong increases, rice prices decreased sharply in July and August to low levels**

### Paddy production in 2017 forecast to exceed last year's good level

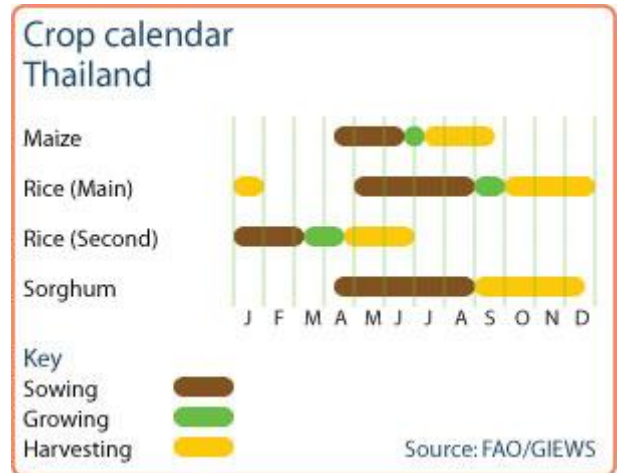
Harvesting of the 2017 main season paddy crop, started in August in some areas, with the bulk to be gathered between October and January. Overall, the season progressed well, with abundant rains and ample availability of water for irrigation, aiding crop development. Above-average rains in July and August also triggered localized flooding in the northern and north-eastern areas of the country, but overall the impact on the 2017 main season is expected to be minimal. Area planted to the 2017 main season rice crops is estimated to have increased slightly, supported by remunerative prices at planting time. As a result and assuming normal weather for the remainder of the season, the 2017 aggregate paddy output is forecast at 33.7 million tonnes, 3 percent or 1.1 million tonnes above last year's good level.

The 2017 maize crop is preliminary forecast at 4.3 million tonnes, 7 percent below last year's high level. The projected year-on-year decrease is mainly the result of a contraction in area planted, as producers react to low prices by shifting maize areas to more profitable crops, such as sugarcane.

### Rice exports in 2017 forecast to increase to a three-year high

Rice exports in 2017 are forecast at 10.7 million tonnes, up 8 percent from last year's level and a three-year high. This increase is expected to come from ample exportable availabilities, following a larger 2016 crop, and Government stock releases.

### After several months of strong increases, rice prices decreased sharply in July and August



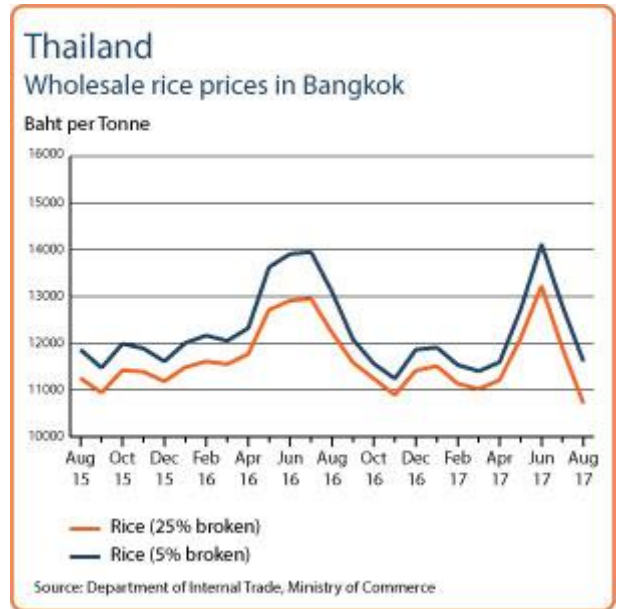
**Thailand Cereal production**

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Rice (paddy)	33 280	32 600	33 650	3
Maize	4 756	4 615	4 300	-7
Cereals nes	94	94	94	0
Others	73	73	73	0
<b>Total</b>	<b>38 204</b>	<b>37 382</b>	<b>38 117</b>	<b>2</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

Domestic rice prices increased strongly between April and June, reaching the highest level since September 2013, mainly supported by strong demand from abroad. In July and August, rice prices decrease sharply reversing previous increases, amid favourable prospects for the 2017 paddy crops and a slowdown in international demand. Overall, rice prices in August were well below their year-earlier levels.

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## GIEWS Country Brief Thailand

Reference Date: 25-November-2016

### FOOD SECURITY SNAPSHOT

- Paddy production in 2016 to recover after two consecutive years of drought-reduced outputs
- Rice exports in 2016 forecast close to last year's high level
- Domestic prices of rice declining

### Paddy production in 2016 forecast to recover

Harvesting of the 2016 mostly rainfed main season paddy crop, accounting for over 70 percent of the annual production, is ongoing and is expected to continue until January. After two years of severe drought, the 2016 monsoon brought abundant rains over most of the country benefitting crop growth in rainfed areas. Improved water availabilities for irrigation also allowed planting operations in the irrigated perimeters to pick up, after some delays at the start of the season. Reflecting expectations of gains in the main and the forthcoming secondary season crops, FAO forecasts 2016 aggregate paddy production at 31.1 million tonnes. This implies a 9 percent recovery from the 2015 drought-reduced output but still well below production between 2011 and 2013, when output grew in response to high support prices offered under the defunct paddy-pledging programme.

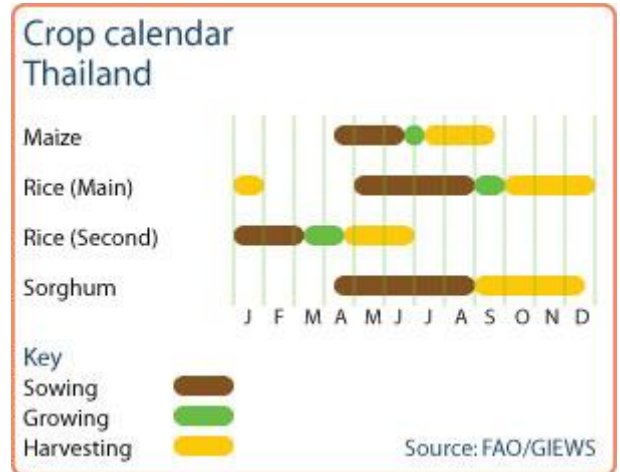
The 2016 maize crop, harvested by mid-September, is estimated at 5 million tonnes, an 8 percent recovery from last year's reduced output, reflecting an increase of both area planted and yields.

### Rice exports in 2016 forecast close to last year's level

Despite the significant decrease in the 2015 rice production, rice exports in 2016 are forecast at 9.9 million tonnes, close to the 2015 level, sustained by sales of rice from Government's reserves.

### Domestic rice prices declining

Domestic rice prices have declined for the third consecutive month and reached an 11-month low in October, as a result of ample domestic availabilities, a slow pace of sales abroad and main crop harvest pressure. In an attempt to prevent prices from decreasing further during harvesting time, which extends until January, the Government has implemented a number of measures including the temporary suspension of rice releases

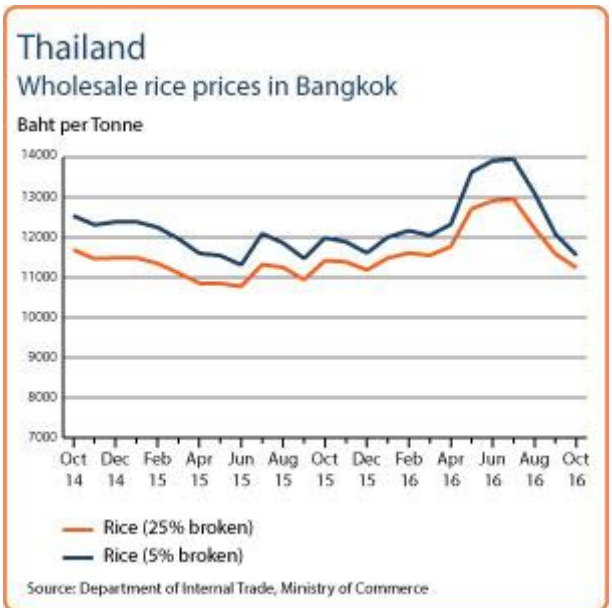
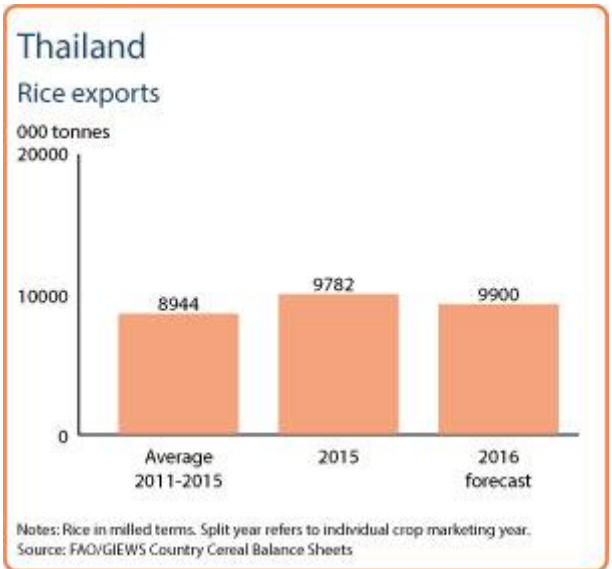


Thailand  
Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	34 964	28 500	31 100	9
Maize	4 830	4 611	5 000	8
Cereals nes	94	94	94	0
Others	73	73	73	0
<b>Total</b>	<b>39 961</b>	<b>33 278</b>	<b>36 267</b>	<b>9</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

from the Government's stockpiles and storage incentives to delay the arrival of the main season crops into the market ([FPMA Food Policies](#)).





Reference Date: 18-May-2016

### FOOD SECURITY SNAPSHOT

- Preliminary forecasts point to partial recovery in 2016 paddy output
- Rice production sharply down in 2015 for second consecutive year due to drought
- Domestic prices of rice increased in April

### Preliminary forecasts point to partial recovery in 2016 paddy output

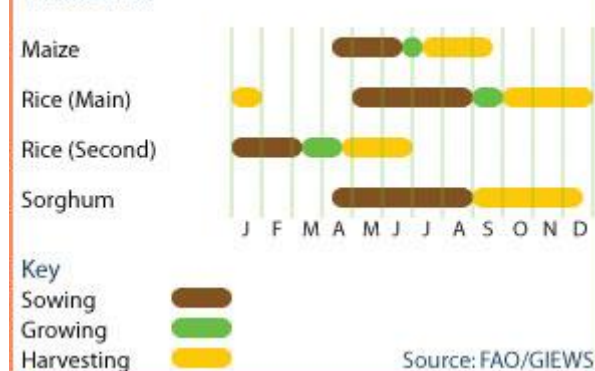
Planting of the 2016, mostly rainfed main season rice, usually starts in May in the northern areas, with the bulk of crop planted from June onwards. According to the Thai Meteorological Department, rains are forecast to improve over much of the country with the onset of the monsoon season from late May. This is expected to benefit planting operations particularly in the rainfed northern and northeastern regions, which account for the bulk of main season output. Despite an improved forecast for the monsoon season, water levels in the main reservoirs remain significantly constrained, following precipitation shortages endured since 2014, which are associated with the prevailing, but currently weakening El Niño episode. This has prompted the Government to encourage farmers to delay plantings in irrigated perimeters until adequate monsoon rains arrive and reservoirs are recharged. These factors, combined with comparatively subdued farmgate prices since the discontinuation of the paddy-pledging programme in 2014, as well as Government efforts to promote a shift away from rice cultivation, are expected to limit large expansions in plantings in the 2016 season. Therefore, FAO tentatively projects aggregate paddy production in 2016 at 30.3 million tonnes, 6 percent up from the 2015 drought-reduced output but still well below the abundant harvests gathered between 2011 and 2013, when output grew in response to high-intervention prices offered under the paddy-pledging programme.

The 2016 maize crop is forecast at 4.7 million tonnes, slightly above last year's reduced output but still below average. Although the persisting dry conditions are expected to limit production again in 2016, assuming a return to more normal weather, plantings and yields are tentatively forecast to recover partially from the previous year's low levels.

### Rice production sharply down in 2015 for second consecutive year due to drought

FAO's latest forecast for the 2015 secondary season rice crop, currently being harvested, stands at 4.2 million tonnes, 26 percent below the already reduced output of the same season in the previous year, and almost two-thirds below the average of the previous five years. This is mainly the result of significant planting reductions, due to the prolonged dry weather (that are associated with the prevailing, but currently weakening, El Niño episode), coupled with extreme low irrigation water availabilities. Similarly, the

### Crop calendar Thailand

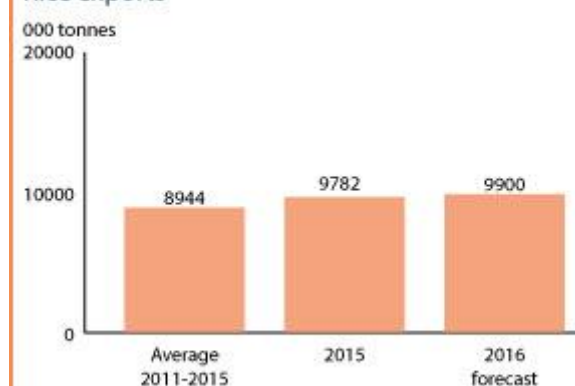


### Thailand Cereal production

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Rice (paddy)	34 959	28 700	30 300	6
Maize	4 830	4 611	4 700	2
Cereals nes	94	94	94	0
Others	73	73	73	0
Total	39 957	33 478	35 167	5

Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets

### Thailand Rice exports



2015 main season rice crop, already harvested, was also affected by the severe dryness and is estimated to have decreased by 7 percent to 24.5 million tonnes. As a result, the 2015 aggregate paddy production is forecast at 28.7 million tonnes, 14 percent down from the 2014 already reduced level.

### Rice exports forecast close to last year's level

Despite a decrease in the 2015 rice production, rice exports in 2016 are forecast at 9.9 million tonnes, slightly above the 2015 level, sustained by continued sales of rice from Government reserves.

### Rice prices increased in April

Domestic rice prices increased in April and were higher than a year earlier mainly supported by prospects of the drought-reduced 2015 secondary season harvest. Continuing export sales to traditional buyers also contributed to the upward pressure on prices.



Reference Date: 03-June-2015

### FOOD SECURITY SNAPSHOT

- Below-average rains in May delayed planting of 2015 main season rice crop in several areas
- Rice exports forecast to increase in 2015
- Domestic prices of rice remained stable in May

### Below-average rains in May delayed planting of 2015 main season rice crop in several areas

Planting of the 2015 main season cereal crops, including rice and maize, is currently underway. Below-average precipitation in the first and second dekads of May, coupled with high temperatures, delayed planting in several parts. However, according to recent projections from the Thai Meteorological Department, rains are expected to improve from early June. Planting operations normally extend until August. The dry weather at the beginning of the season may be associated with the onset of a weak-to-moderate El Niño event this year, which causes concern about cereal production, as the phenomenon is often associated with below-average precipitation. Yet, considerable uncertainty persists about the intensity and duration of the event, as well as its impact on crops. At this early stage of the season and assuming an improvement of the rainy season performance in the coming weeks, FAO tentatively projects the 2015 aggregate rice output at 35 million tonnes, a moderate recovery from the 2014 reduced production.

### Reduced aggregate rice crop in 2014

FAO's latest estimates for the 2014/15 secondary season rice crop, currently being harvested, is put at 7.2 million tonnes, 26 percent below last year's good secondary season. Significant planting reductions due to prolonged dry weather particularly in the northern and central regions of the country, coupled with slightly lower yields, led to the production decline. The 2014 aggregate rice production, including 27.1 million tonnes from the main season, is, therefore, estimated at 34.3 million tonnes, some 7 percent below the 2013 bumper crop.

### Rice export forecast to increase in 2015

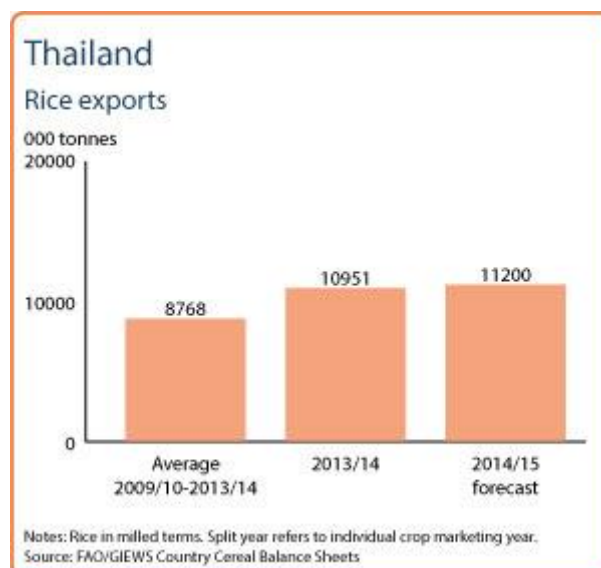
Despite the decrease in 2014 rice production, rice exports in 2015 are forecast to increase to 11.2 million tonnes, slightly above last year's high level, due to high volumes of public stocks and Government's intentions to promote larger sales. At this level, the 2015 export is slightly above 2014 and about 28 percent up on the average of the previous five years.



**Thailand Cereal production**

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	36 647	34 290	35 000	2
Maize	4 895	4 805	5 000	4
Cereals nes	94	94	94	0
Others	73	74	73	-1
<b>Total</b>	<b>41 710</b>	<b>39 263</b>	<b>40 167</b>	<b>2</b>

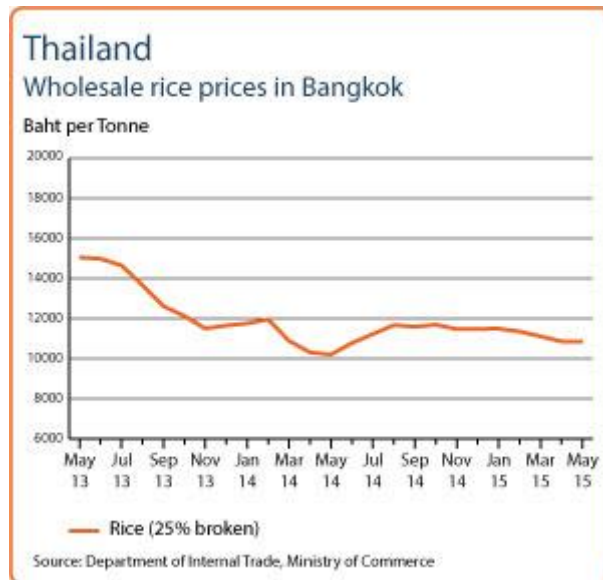
Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets



Thailand imports all of its wheat requirements, estimated at about 1.9 million tonnes.

### Rice prices relatively stable in May

Domestic rice prices remained relatively stable in May, after weakening in the past months with the release of Government stocks and generally low export demand. Improved availabilities from the ongoing 2014/15 secondary season harvest, despite being significantly lower compared to last year, added some downward pressure.



Reference Date: 07-May-2015

### FOOD SECURITY SNAPSHOT

- Planting of 2015 main season underway
- Rice exports in 2015 forecast at record level
- Domestic prices of rice decreased slightly in April
- Food security situation is generally satisfactory

### Main season 2015 rice crop being planted under favourable weather conditions

Planting of the 2015 main season cereal crops, including rice and maize, is currently underway. According to projections from the Thai Meteorological Department, despite some delays, rains are expected to improve with the onset of the monsoon season from late May. As a result, FAO currently forecasts the current main season rice production, for harvest from October onwards at 27.2 million tonnes, close to last year's seasonal good output of about 27.1 million tonnes. Accordingly, FAO's preliminary forecast of the 2015 aggregate paddy harvest, including the secondary season paddy crop for harvest in early 2016, is put at 35 million tonnes, slightly above the reduced 2014 harvest.

The 2015 maize crop is forecast at 5 million tonnes, about 4 percent above last year's slightly below-average level. Higher plantings are assumed in response to the sustained demand from the feed industry.

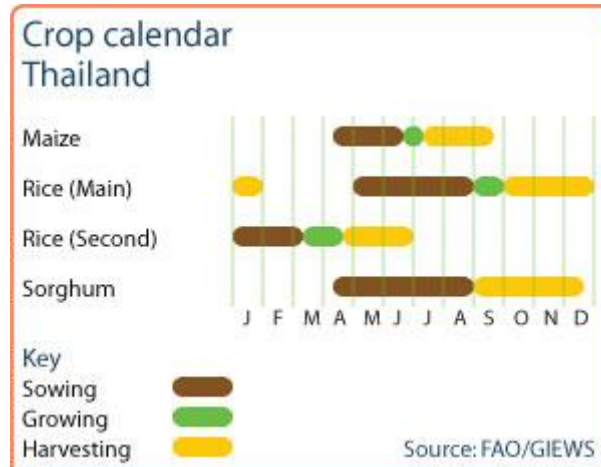
### Reduced aggregate rice crop in 2014

FAO's latest estimates for the 2014/15 secondary season rice crop, currently being harvested, is put at 7.2 million tonnes, 26 percent below last year's good secondary season. Significant planting reductions due to prolonged dry weather particularly in the northern and central regions of the country, coupled with slightly lower yields, led to the production decline.

The 2014 aggregate rice production, including 27.1 million tonnes from the main season, is, therefore, estimated at 34.3 million tonnes, some 7 percent below the 2013 bumper crop.

### Record rice export level forecast in 2015

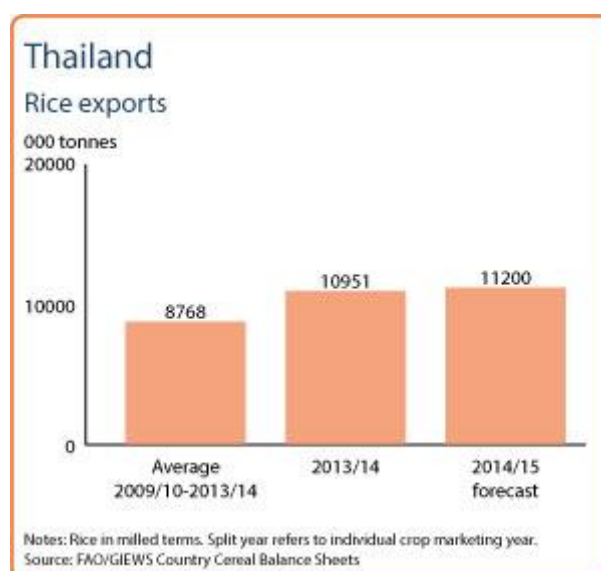
Despite the decrease in 2014 rice production, a record level of rice exports, estimated at about 11.2 million tonnes, is projected in 2015 due to high levels of public stocks and Government's intentions to promote larger sales. At this level, the 2015 export is slightly above 2014 and about 28 percent up on the average of the previous five years.



### Thailand Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Rice (paddy)	36 647	34 290	35 000	2
Maize	4 895	4 805	5 000	4
Cereals nes	94	94	94	0
Others	73	74	73	-1
<b>Total</b>	<b>41 710</b>	<b>39 263</b>	<b>40 167</b>	<b>2</b>

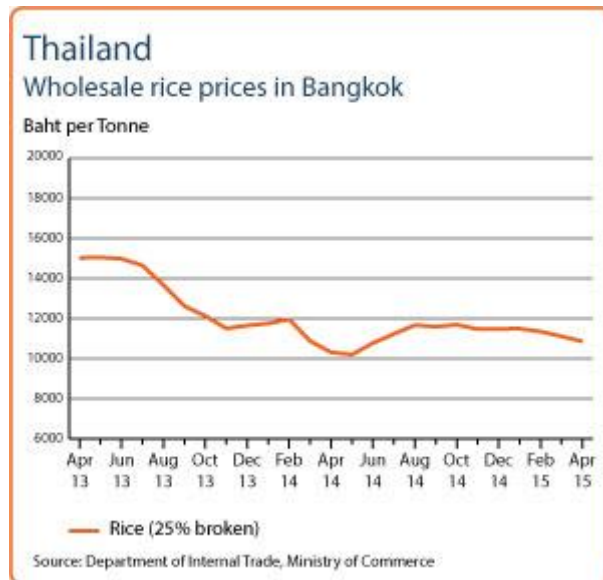
Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets



Thailand imports all its wheat requirements, estimated at about 2 million tonnes.

### Rice prices decline slightly in April

Domestic rice prices decreased slightly in April, following improved availabilities due to the 2014/15 secondary season harvest and higher volumes of sales from Government stocks in the previous months. Sluggish export demand also added to the downward pressure.



Reference Date: 14-February-2015

### FOOD SECURITY SNAPSHOT

- Limited water availability expected to reduce 2014/15 secondary season paddy production
- Rice exports in 2015 forecast to hit record level
- Domestic prices of rice remain generally stable
- Overall food security is satisfactory

### Limited water availability expected to reduce 2014/15 secondary season paddy production

Planting of the 2014/15 mostly irrigated secondary season rice crop, accounting for some 30 percent of the annual production, began in early January and is expected to continue until mid-March. Weak monsoon rains from June to October, as well as below-average rains between November and early February over the northern and central regions of the country, reportedly limited water availability for irrigation in the major reservoirs of these areas. As of early February, the Department of Disaster Prevention and Mitigation has declared as drought affected eight provinces, including the main rice producing provinces of Nakhon Ratchasima, Buriram and Sakon. As a result of the limited water availability for irrigation and generally low prices, FAO estimates this season's total area planted to rice to decrease slightly to 2.4 million hectares. Pending a more detailed assessment of drought damage, FAO projects the 2014/15 secondary season paddy production at 9 million tonnes, 8 percent below the good level of last year's same season. Including the revised official estimates of the main season harvest, completed by January, FAO forecasts the 2014 aggregate rice production at 36.1 million tonnes, some 2 percent below last year's bumper level.

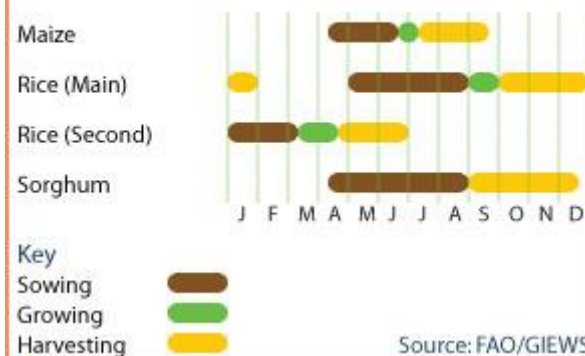
The 2014 maize crop, harvested by mid-September, is officially estimated at 4.8 million tonnes, slightly below last year's bumper level.

### Rice exports in 2015 forecast to hit record level

Despite the slight decrease in 2014 rice production, high levels of public stocks and Government's intentions to promote larger sales are expected to result in record rice exports of 11 million tonnes in 2015. This is some 7 percent higher than last year's high level and 27 percent above the average level of the previous five years.

The country does not produce wheat hence the entire consumed quantity (about 2 million tonnes) is imported.

### Crop calendar Thailand

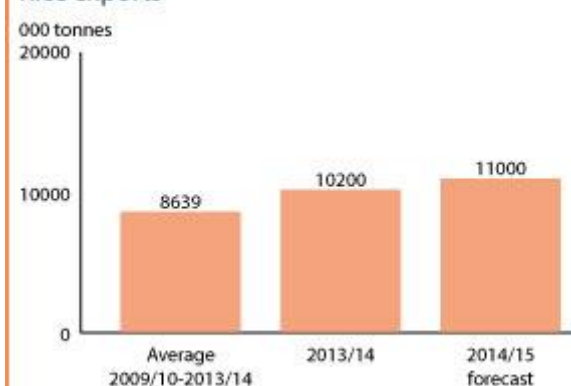


### Thailand Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	36 268	36 839	36 106	-2
Maize	4 857	4 876	4 805	-1
Cereals nes	94	95	94	-1
Others	73	73	74	1
<b>Total</b>	<b>41 292</b>	<b>41 883</b>	<b>41 079</b>	<b>-2</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

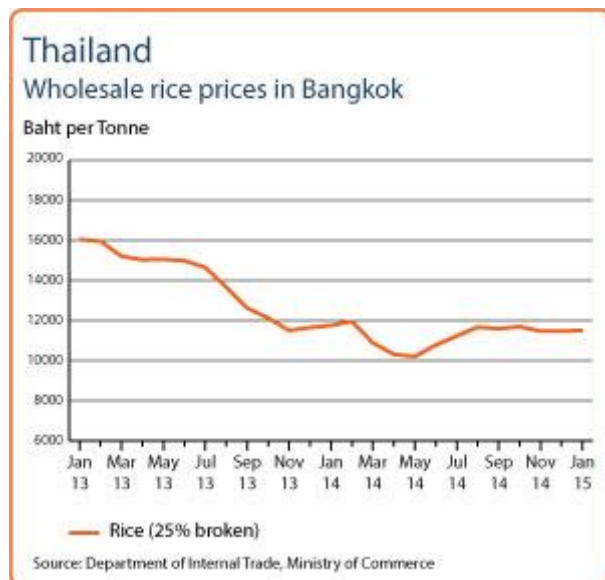
### Thailand Rice exports



Notes: Rice in milled terms. Split year refers to individual crop marketing year.  
Source: FAO/GIEWS Country Cereal Balance Sheets

## Domestic prices of rice remain generally stable in January

Domestic rice prices were relatively stable in January, reflecting the trend in the export market. Higher volumes of rice released from Government stocks contributed to keep quotations below the levels of a year earlier.





Reference Date: 11-November-2014

### FOOD SECURITY SNAPSHOT

- 2014 main season paddy production forecast to decline slightly from last year's record output
- Rice exports in 2014 expected to increase considerably from last year's low level
- Domestic prices of rice remain generally stable
- Overall food security in the country is satisfactory

### 2014 main season paddy output to decline slightly from last year's record level

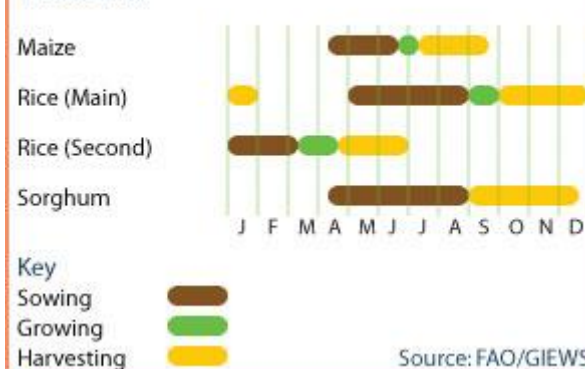
Harvesting of the 2014, main season rice crop, accounting for over 70 percent of the annual production, began in early October and is expected to last until January. Below-average monsoon rains between May and early July particularly over the northern and central producing areas, delayed somewhat planting activities. However, rains improved from mid-July over much of the country, permitting rice transplanting operations to pick up and benefitting crop development. The total area planted to rice this season is officially estimated to have decreased to 10.3 million hectares, slightly below the average level of the same season last year, in response to low prices at planting time. Considering the slight contraction in area planted and assuming average yields, FAO preliminarily forecasts the 2014 main season rice production at 27.5 million tonnes, 2 percent below last year's record output. Including an average 2014/15 secondary season output, the 2014 aggregate rice production is tentatively forecast at 37.5 million tonnes, some 2 percent below last year's bumper level.

The 2014 maize crop, harvested by mid-September, is officially estimated at 5 million tonnes close to last year's record level.

### Rice exports in 2014 forecast to increase considerably from last year's low level

Ample supplies from the record paddy production in 2013 and high carryover stocks together with the resumption of sales from Government warehouses since August are expected to result in 9.6 million tonnes of rice exports in 2014, some 45 percent from last year's low level and 15 percent above the average level of the previous five years. Between late May and July this year, the Government temporarily suspended rice sales from public stocks. However, some releases took place under pre-existing sales agreements and Government-to-Government commitment with China. Stock sales have been resumed since August but through small volumes with the aim to keep local prices stable. The country does not produce wheat hence the entire quantity (about 2 million tonnes) is imported.

### Crop calendar Thailand

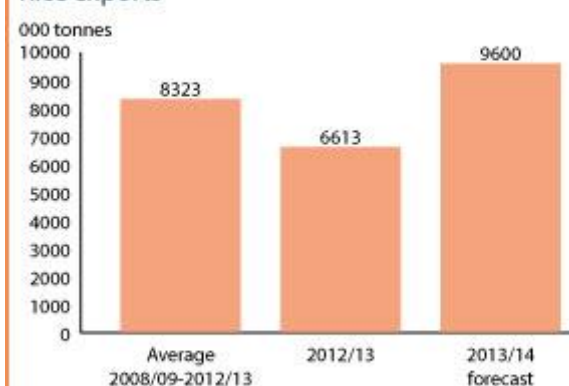


### Thailand Cereal production

	2009-2013	2013	2014	change
	average		forecast	2014/2013
	000 tonnes			percent
Rice (paddy)	36 522	38 108	37 500	-2
Maize	4 894	5 063	5 005	-1
Cereals nes	94	95	94	-1
Others	73	73	74	1
<b>Total</b>	<b>41 584</b>	<b>43 339</b>	<b>42 673</b>	<b>-2</b>

Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets

### Thailand Rice exports

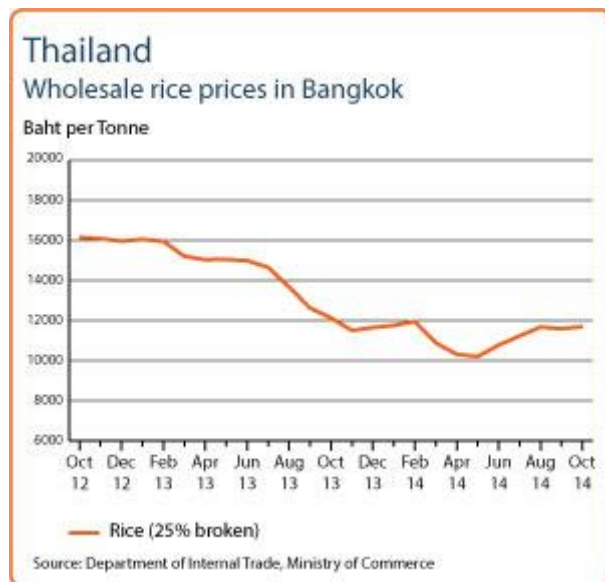


Notes: Rice in milled terms. Split year refers to individual crop marketing year.  
 Source: FAO/GIEWS Country Cereal Balance Sheets

## Domestic prices of rice remain generally stable

Domestic rice prices were relatively stable in October mainly as a result of lower export activity. The reduced volumes of rice released from Government stocks contributed to keep quotations close to their previous month's level. Prices are expected to decline in November with the peak of the 2014 main season harvest.

The latest official data indicate that the national year-on-year inflation rate in October 2014 was 1.5 percent.



Reference Date: 14-August-2014

### FOOD SECURITY SNAPSHOT

- Favourable prospects for the 2014 main season paddy crop
- Rice exports forecast at an above-average level in 2014
- Domestic prices of rice increased somewhat in July but remain at low levels
- Overall food security in the country is satisfactory

### Favourable prospects for the 2014 main season paddy crop

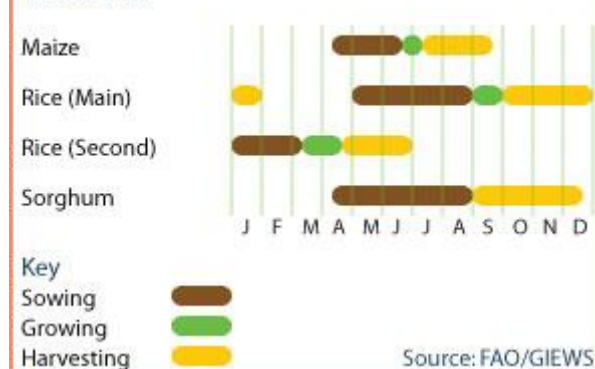
Planting of the 2014, main season rice crop, accounting for 70 percent of the annual production, began in early May in the north and is expected to continue until late August in the main producing southern areas. According to the Thai Meteorological Department, rainfall in May and June was generally below average particularly over the northern and central producing areas, hindering somewhat planting activities. However, rains improved from early July over much of the country, benefitting transplanting activities and the early planted crops. The total area planted to rice this season is officially forecast to decrease to 10.3 million hectares, slightly below the average level of the same season last year, mainly as a result of low domestic prices. Considering the slight contraction in area planted and assuming average yields, FAO preliminarily forecasts the 2014 main season rice production at 27.5 million tonnes, 2 percent below last year's record output. Including an average 2014/15 secondary season output, the 2014 aggregate rice production is tentatively forecast at 37.5 million tonnes, some 2 percent below last year's bumper level.

The latest official forecast for the 2014 maize crop, currently being harvested, is set at a record level of 5.1 million tonnes, slightly above last year's bumper output. This is mainly attributed to a small increase in plantings in response to sustained demand from the feed industry.

### Rice exports forecast at an above-average level in 2014

Following the near-record production in 2013 and high carryover stocks, as well as the recent resumption of sales from Government warehouses, rice exports in 2014 are forecast at 9 million tonnes, a recovery of 36 percent from last year's low level and 8 percent above the average level of the previous five years. Between late May and July, the Government had temporarily suspended rice sales from public stocks. However, during this period, some releases took place under pre-existing sales agreement and deliveries under a government-to-government commitment with China have also proceeded. The country does not produce wheat hence the entire quantity (about 2 million tonnes) is imported.

### Crop calendar Thailand

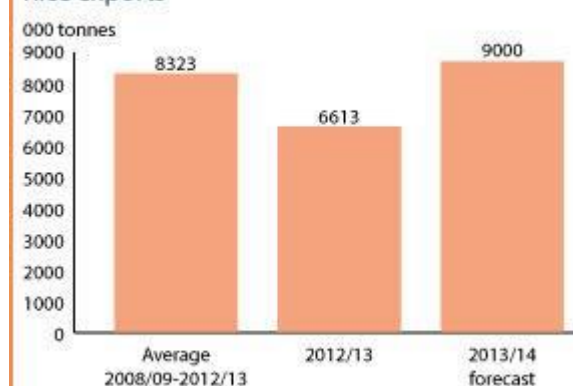


### Thailand Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Rice (paddy)	36 550	38 247	37 500	-2
Maize	4 894	5 063	5 095	1
Cereals nes	94	95	94	-1
Others	73	73	74	1
<b>Total</b>	<b>41 611</b>	<b>43 478</b>	<b>42 763</b>	<b>-2</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Thailand Rice exports

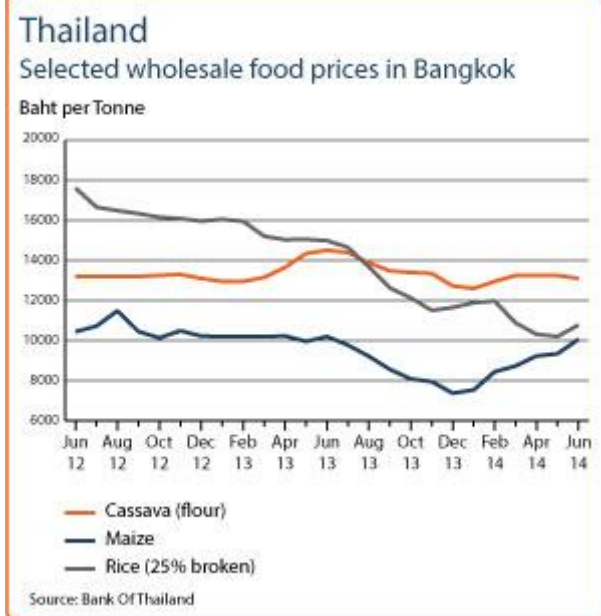


Notes: Rice in milled terms. Split year refers to individual crop marketing year.  
Source: FAO/GIEWS Country Cereal Balance Sheets

## Domestic prices of rice increased somewhat in July but remain at low levels

Domestic rice prices, which had declined between March and May 2014 with the 2013/14 secondary season harvest and continuous releases from public stocks, rebounded somewhat for the second consecutive month in July mainly due to the suspension of rice sales from Government warehouses. However, prices remain generally below their levels of a year earlier.

The latest official data indicate that the national year-on-year inflation rate in July 2014 was 2.2 percent.



Reference Date: 28-May-2014

### FOOD SECURITY SNAPSHOT

- Favourable weather conditions for the 2014 main season paddy and maize crops planting
- Rice exports continue at normal pace and are forecast at an above-average level in 2014
- Domestic prices of rice declining and at low levels
- Overall food security in the country is satisfactory

### Favourable weather conditions for planting of the 2014 main season paddy and maize crops

Planting of the 2014 main season cereal crops, including rice and maize, is currently ongoing. Remote-sensed data indicate that rainfall since mid-April has been above average over the main cereal-producing areas, facilitating land preparation. The total area planted to rice this season is officially forecast to decrease to 10.3 million hectares, slightly below the average level of the same season last year, due to lower domestic prices and high carryover stocks. Assuming average yields, FAO's preliminary forecasts the 2014 main season rice production at 28 million tonnes, 2 percent below last year's record output and the 2014 aggregate rice production at 38 million tonnes, around last year's bumper level.

The 2014 maize production is officially forecast at 5.1 million tonnes, similar to last year's record output, as a result of anticipated higher plantings in response to sustained demand from the feed industry.

### The 2013 aggregate rice production estimated at a record level

Harvesting of the 2013/14 mostly irrigated secondary season rice crop, accounting for almost 30 percent of the annual production, started in late April and will continue until June. Latest official forecast for the 2013/14 secondary season rice crop, currently being harvested, is set at 10.1 million tonnes, 5 percent below the previous year's same season record level. This is the result of lower yields, following prolonged dry weather which limited water availabilities for irrigation particularly in the northern and central parts of the country. However, a 5 percent increase in the 2013 main season rice crop more than offset the reduced production of the secondary season and the 2013 aggregate rice production is put at a record level of 38 million tonnes, 3 percent above the bumper 2012 outcome.

### Rice exports continue at a normal pace and are forecast at an above average level in 2014

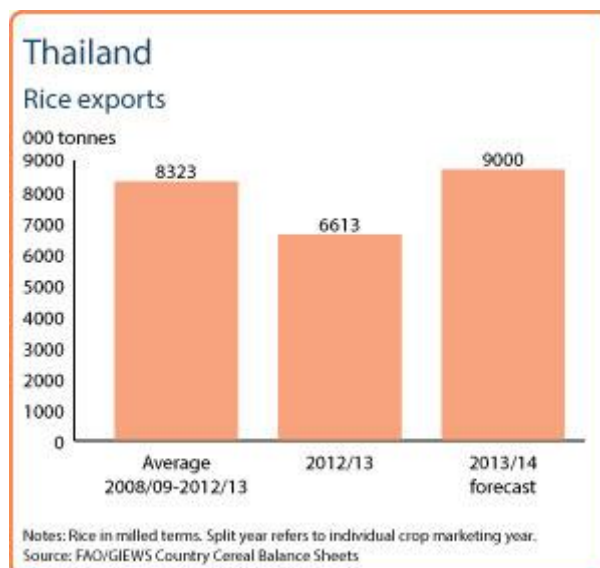
In the 2014 marketing year (January/December) rice exports are forecast at 9 million tonnes, some 36 percent above last



#### Thailand Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Rice (paddy)	36 550	38 247	37 500	-2
Maize	4 894	5 063	5 095	1
Cereals nes	94	95	94	-1
Others	73	73	74	1
<b>Total</b>	<b>41 611</b>	<b>43 478</b>	<b>42 763</b>	<b>-2</b>

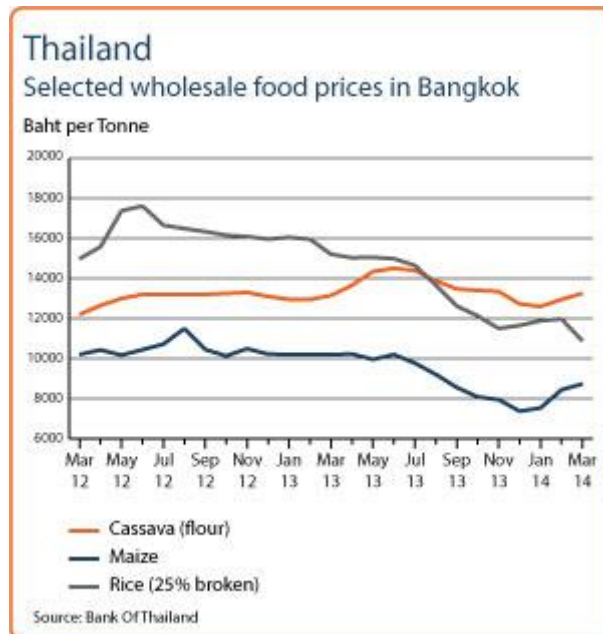
Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets



year's low level and 8 percent above the average level of the previous five years. The expected recovery mainly reflects the near-record production of the 2013 main season and high carryover stocks. Despite current political instability, which was feared to hamper access to government stocks, exports continue at a normal pace. The country does not produce wheat hence the entire quantity (about 2 million tonnes) is imported.

### Domestic prices of rice declining and at low levels

Domestic rice prices further declined in April, reflecting continuous large sales of government stocks, coupled with supplies from the ongoing 2013/14 secondary season harvest entering the markets. Rice prices have generally been on a declining trend since mid-2012 and in April were about one-third below their levels of a year earlier.



Reference Date: 28-January-2014

### FOOD SECURITY SNAPSHOT

- Poor rainfall expected to limit the 2013/14 secondary season paddy production
- 2013 main season rice production forecast at a record level
- Average rice exports forecast in 2013
- Domestic prices of rice declining and at low levels
- Overall food security in the country is satisfactory

### Poor rainfall expected to limit the 2013/14 secondary season paddy production

Planting of the 2013/14 secondary season crop began in early January and is expected to last until mid-April. The rainfall was below average in January over much of the country, delaying planting operations. As a result, the preliminary official estimate for the secondary season paddy crop marked a reduction of some 22 percent in the plantings compared to the same season last year. Production is preliminarily forecast at 8.5 million tonnes, some 20 percent below last year's above average harvest of the same season.

### 2013 main season rice production forecast at a record level

Harvesting of the 2013 main season paddy crop, which accounts for over 70 percent of the aggregate production, is nearing completion. The monsoon season rains, between May and August, were above-average in the northeastern region of the country which accounts for over 50 percent of the main season rice plantings. The rest of the country experienced generally average rains during the same period. A succession of tropical storms resulted in localized floods from late September, particularly in northeast and central parts of the country. However, the impact on the rice crop was minimal. The Office of Agricultural Economics (OAE) estimates the 2013 main season paddy production at 28.1 million tonnes, some 3.4 percent above the previous year's record harvest of the corresponding season. The increase mainly reflects generally favourable monsoon rains and the government support to the sector. The 2013 aggregate paddy production, including FAO's forecast output of the next 2013/14 secondary season, is tentatively forecast at 36.6 million tonnes, some 4 percent below the above-average crop in 2012.

Harvesting of the 2013 maize crop was completed by mid-September. Latest official estimates point to a crop of 5 million tonnes, similar to last year's bumper output.

### Average rice exports forecast in 2013

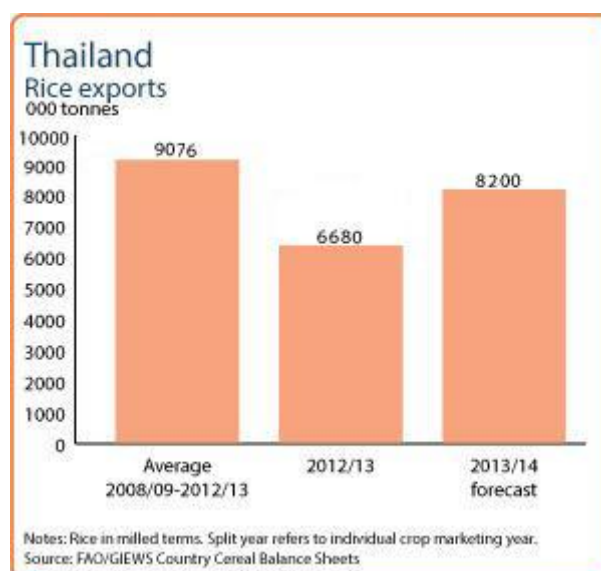
In 2013 marketing year (January/December) rice exports are estimated to increase from last year's reduced levels and remain slightly below the level of the past five years at 8.2 million tonnes. The recovery mainly reflects the near-



### Thailand Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	34,563	37,976	36,638	-4
Maize	4,743	4,965	4,985	0
Cereals nes	95	95	95	0
Others	74	72	73	1
<b>Total</b>	<b>39,474</b>	<b>43,108</b>	<b>41,791</b>	<b>-3</b>

Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets



record production of the 2013 main season. The country does not produce wheat hence entire quantity (about 2 million tonnes) is imported.

### **Domestic prices of rice declining and at low levels**

Domestic rice prices in December decreased for the tenth consecutive month, mainly reflecting improved supplies from the 2013 main season paddy crop harvest, estimated 3 percent higher than last year's same season, as well as selling off of Government stocks. Overall, domestic rice prices were below their levels a year earlier.

The overall food security situation in the country is satisfactory.



Reference Date: 15-November-2013

### FOOD SECURITY SNAPSHOT

- 2013 main season rice production forecast at a record level
- Average rice exports forecast in 2013
- Domestic prices of rice declining and at low levels
- Overall food security in the country is satisfactory

### 2013 main season rice production forecast at a record level

Harvesting of the 2013 main season paddy crop, which accounts for over 70 percent of the aggregate production, began in early October and is expected to last until January. The monsoon season rains, between May and August, were above-average in the northeastern region of the country which accounts for over 50 percent of the main season rice plantings. The rest of the country experienced generally average rains during the same period. A succession of tropical storms resulted in localized floods from late September, particularly in northeast and central parts of the country. However, the impact on the rice crop was minimal. The Office of Agricultural Economics (OAE) forecasts the 2013 main season paddy production at 27.6 million tonnes, some 2 percent above the previous year's record harvest of the corresponding season. The increase mainly reflects generally favourable monsoon rains and the government support to the sector. The 2013 aggregate paddy production, including FAO's forecast output of the next 2013/14 secondary season, is tentatively forecast at 38 million tonnes, some 4 percent higher than the above-average crop in 2012. Harvesting of the 2013 maize crop was completed by mid-September. Latest official estimates point to a crop of 5 million tonnes, similar to last year's bumper output.

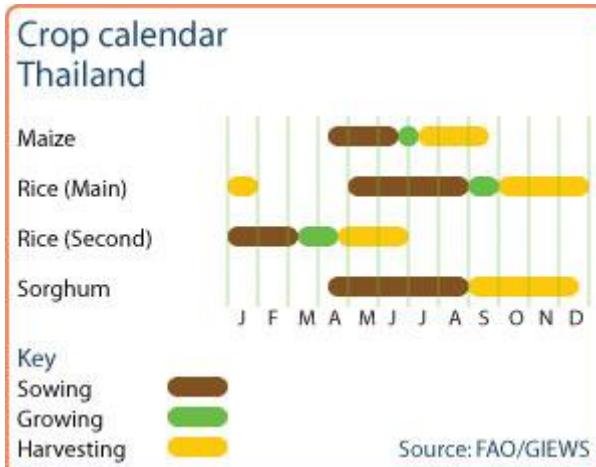
### Average rice exports forecast in 2013

In 2013 marketing year (January/December) rice exports are forecast to increase from last year's reduced levels and remain at average level of the past five years at 8.5 million tonnes. The recovery mainly reflects the near-record production this year. The country does not produce wheat hence entire quantity (about 2 million tonnes) is imported.

### Domestic prices of rice declining and at low levels

Domestic rice prices decreased slightly in October, with the start of the 2013 main season harvest and continuous sales of old-crop stocks by farmers. Overall, domestic rice prices were below their levels a year earlier after marked declines in the previous months following export prices trends.

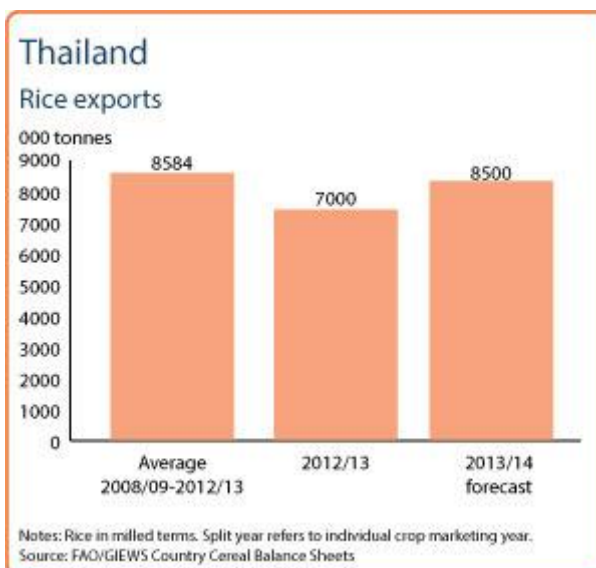
The overall food security situation in the country is satisfactory.



**Thailand Cereal production**

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Rice (paddy)	35,020	36,576	38,000	4
Maize	4,743	4,965	4,985	0
Cereals nes	95	95	95	0
Others	74	72	73	1
<b>Total</b>	<b>39,930</b>	<b>41,708</b>	<b>43,153</b>	<b>3</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 13-February-2013

### FOOD SECURITY SNAPSHOT

- Favourable rainfall for the 2012/13 secondary paddy season
- Record 2012 paddy harvest forecast
- Below average rice exports forecast in 2013
- Domestic prices of rice have come down since November
- Overall food security in the country is satisfactory

### Favourable rainfall for the 2012/13 secondary paddy season

Planting of the 2012/13 secondary season paddy crop began in early January and is expected to last until early-March. Generally above-normal rainfall since December over much of the country have benefited planting activities. Prospects for the current crop are good and the preliminary estimate for the secondary season paddy is set to reach 11.7 million tonnes, some 3 percent above the previous year's record output of the same season.

### Record 2012 paddy harvest forecast

Harvesting of the 2012 main season paddy crop is completed. Latest official estimates for the 2012 main season crop point to a record harvest of 26.1 million tonnes, mainly on account of improved yields, following generally favourable weather and adequate water supplies. The 2012 aggregate paddy output (including the main and the current secondary seasons) is officially forecast to reach a record level at 37.8 million tonnes, some 7 percent above the flood affected harvest of 2011. On average, the main and secondary seasons account for around 70 and 30 percent, respectively, of the annual paddy production.

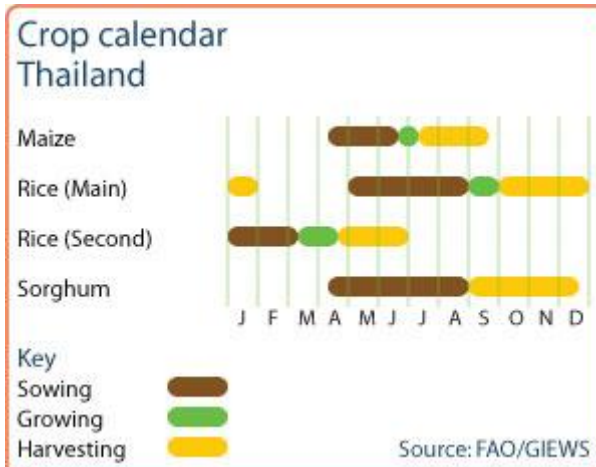
### Below average rice exports forecast in 2013

In 2012, Thailand fell behind India as the world's major rice exporter. In 2013 marketing year (January/December) rice exports are forecast to recover partially and reach 7.7 million tonnes, some 12 percent above the previous year but still remain 28 percent below the record shipments in 2011. Export revenues of the country were boosted due to high volumes and high international prices in the previous three years.

The country does not produce wheat hence entire quantity (about 2 million tonnes) is imported.

### Domestic prices of rice have come down since July 2012

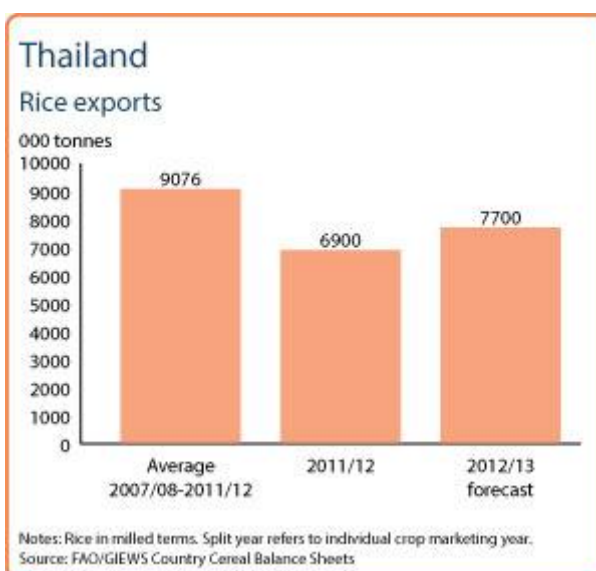
Domestic prices of rice, which follow the trends in the export market, have fallen steadily since July 2012, mainly reflecting the estimated record harvest from the main season. In October, the Government decided to extend the Paddy



### Thailand Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Rice (paddy)	33,417	35,310	37,830	7
Maize	4,480	4,782	4,813	1
Cereals nes	95	94	95	1
Others	74	74	72	-3
<b>Total</b>	<b>38,066</b>	<b>40,260</b>	<b>42,810</b>	<b>6</b>

Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets

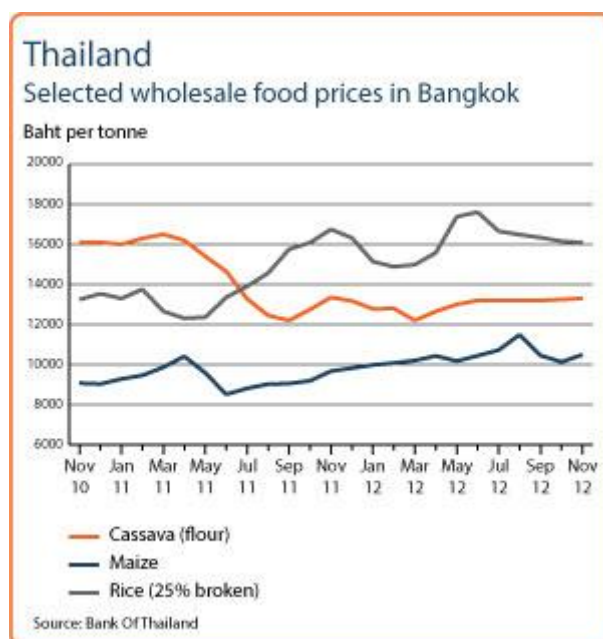
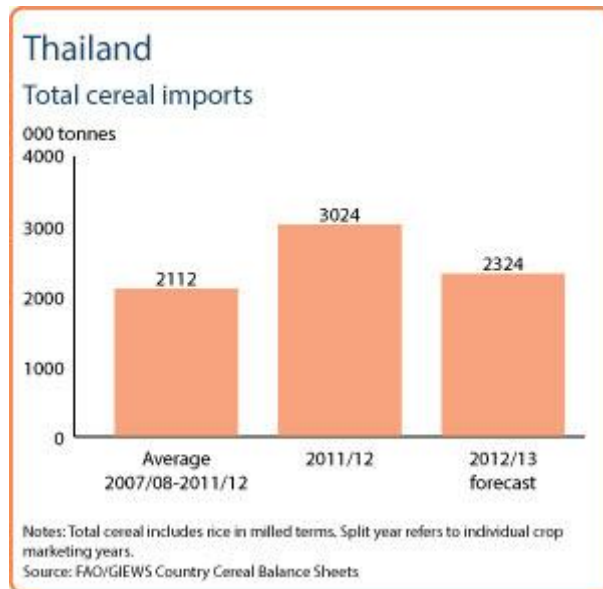


Pledging Program for the current 2012/13 secondary season. Under this scheme, producers will continue to receive between Baht 13 800 and 20 000 (about USD 462 - 670) per tonne. Maize price had been increasing since July 2011 but declined in September and October, in response to the adequate supplies. November price shows a slight upturn.

The latest available official data indicate the annual consumer price index (CPI) in December 2012 was up by 3.6 percent relative to the same period a year before.

### Overall food security in the country is satisfactory

The overall food security situation in the country is satisfactory. Although the national crop production in 2012 has recovered, the lingering effects of flood damages on those who lost their livelihood assets remain.



Reference Date: 10-May-2012

### FOOD SECURITY SNAPSHOT

- Severe floods resulted in losses of the 2011 main season paddy crop
- Domestic prices of rice have come down since November
- Overall food security in the country is satisfactory and the rehabilitation of the flood affected population is underway

### Severe floods resulted in losses of the 2011 main season paddy crop

The 2011 main season paddy crop, harvested from October 2011 to January 2012, is officially estimated at 20.4 million tonnes, some 5.1 million tonnes below the record harvest of the previous year's same season. A combination of heavy monsoon rains and tropical storms since late July and especially during December 2011 and January 2012 caused severe flash flooding in the North, Northeast, East and Central regions of the country. The Department of Disaster Prevention and Mitigation estimated that 60 out of 77 provinces were affected by the floods. Official estimates indicate that the floods affected over 2.4 million people and damaged at least 1.6 million hectares of standing crops. The affected area covers 12.5 percent of total national cropped land. The main season paddy crop harvested from October onwards, accounts for approximately 60 percent of total annual paddy output.

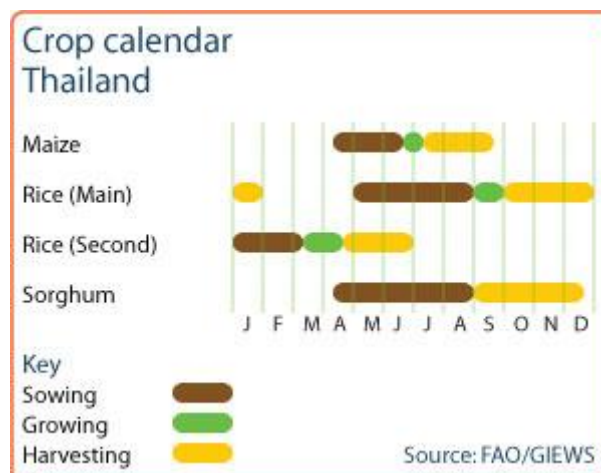
The secondary season crop currently being harvested is forecast at a record level of 11.3 million tonnes, indicating significant recovery from the flood affected paddy areas. Reduction in the national maize harvest is only about 1.6 percent.

In aggregate, the 2011 paddy output (the main crop of 2011 and the secondary crop in early 2012) is estimated at 31.6 million tonnes, 11 percent down on the previous year's bumper level but still around the average of the past five years.

According to the Ministry of Agriculture and Cooperatives, nearly 12.3 million of livestock were at risk during the flood period.

### Reduced rice exports in 2012

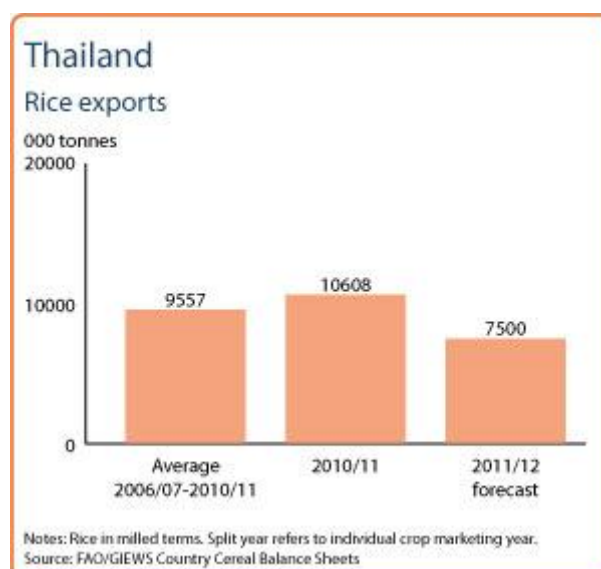
Thailand is the world's largest rice exporter, with the estimated exports of about 10.7 million tonnes in 2011. Export revenues of the country were boosted due to high volumes and high international prices in the previous three years. Rice exports during 2012 marketing year, however, are forecast to decline by about 3 million tonnes of rice (milled) from the record level in 2011. This amount is more-or-less equal to the total flood damage to production and stocks. The country does not



### Thailand Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Rice (paddy)	32 198	35 584	31 625	-11
Maize	4 266	4 861	4 782	-2
Cereals nes	94	93	94	1
Others	74	74	74	0
<b>Total</b>	<b>36 633</b>	<b>40 612</b>	<b>36 575</b>	<b>-10</b>

Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets



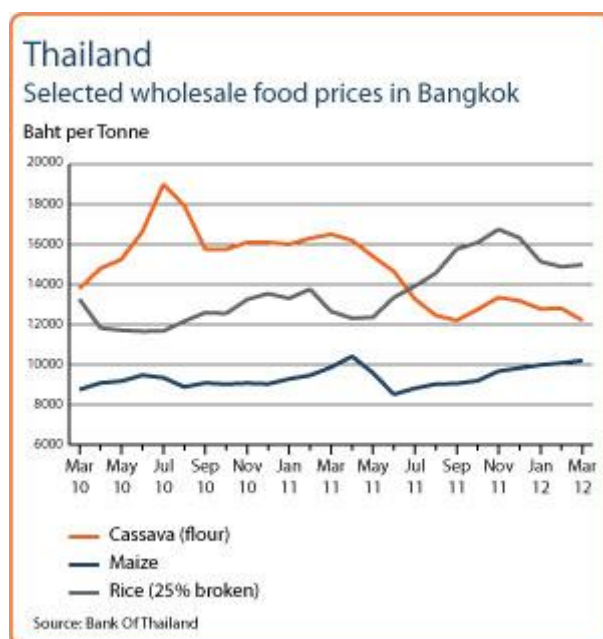
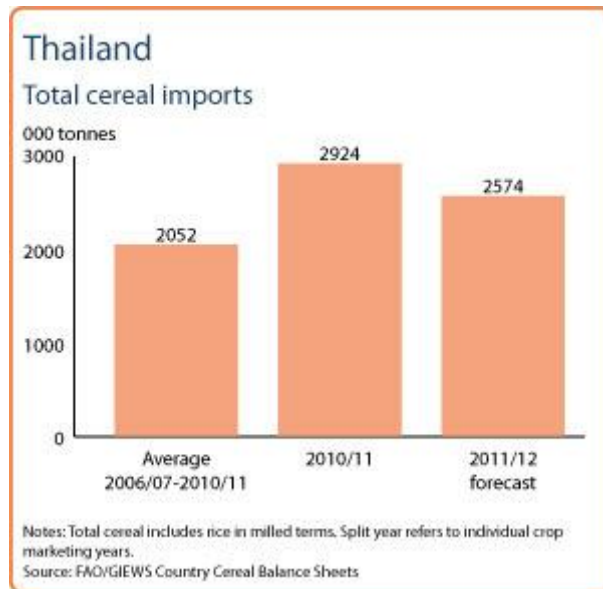
produce wheat hence entire quantity (about 1.75 million tonnes) is imported.

### Domestic prices of rice have come down since November

Despite reduced harvest, domestic prices of rice have fallen steadily since November 2011 with a comfortable stock level. Since February prices have firmed up or stabilized. Prices had reached a peak in November 2011, albeit, still only two-thirds of the historical peak reached in April 2008. Domestic prices for rice follow the trends in the export market. Prices had increased since June 2011 reflecting the government's decision to institute a new Paddy Pledging Program. Maize price on the other hand has been steadily increasing from mid-2011 rising 20 percent in March 2012 above the June 2011 level.

### Overall food security in the country is satisfactory

The overall food security situation in the country is satisfactory. Although the national crop production in the secondary season has recovered from the flood damages, the lingering effects of flood damages on those who lost their livelihood assets remain. The devastating floods had affected some 2.4 million people and caused loss of 320 lives. In addition to damages to agriculture sector, according to the Department of Labour Protection and Welfare, a total of 1 215 industrial factories were submerged and at least 41 000 workers have been affected. The Government and the humanitarian community have assisted the affected population across the country and rehabilitation is underway.



Reference Date: 14-February-2012

### FOOD SECURITY SNAPSHOT

- Severe floods affect the 2011 main season crops, especially paddy
- Domestic prices of rice have been rising in last several months, but decreased slightly in December
- Overall food security in the country is satisfactory, but remains a major challenge for the flood-affected population

### Severe floods affect the 2011 main season crops, especially paddy

A combination of heavy monsoon rains and tropical storms since late July and especially during last two months, have caused severe flash flooding in the North, Northeast, East and Central regions of the country. The Department of Disaster Prevention and Mitigation estimated that 60 out of 77 provinces were affected by the floods. Flood waters have inundated more than two-thirds of the country causing loss of life and livestock, submergence of rice and other crops, closure of hundreds of factories and severe damage to buildings and infrastructure. Official estimates indicate that, as of 14 October, the floods affected over 2.4 million people and damaged at least 1.6 million hectares of standing crops. The affected area covers 12.5 percent of total national cropped land. Although no precise crop damage estimates are yet available, the main rice season at the critical growth stage or ready for harvest is likely to be affected. The provisional FAO forecast for the 2011 main season rice crop has been revised down to 21 million tonnes, showing a decrease of 13.7 percent from the record level harvest of the same season a year before. Including the early forecast output of the next minor crop, FAO estimates the annual total production of paddy for 2011/12 at 32 million tonnes (equivalent to 21.2 million tonnes of milled rice), some 7 percent lower than the previous year's record harvest.

The main season paddy crop harvested from October onwards, accounts for approximately 60 percent of total annual paddy output.

According to the Ministry of Agriculture and Cooperatives, nearly 12.3 million of livestock are at risk.

### Floods may delay rice exports

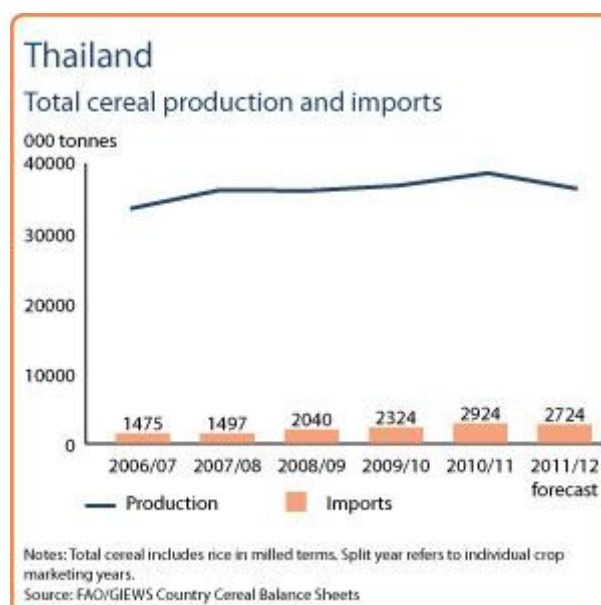
Thailand is the world's largest rice exporter, with the estimated exports of about 10 million tonnes in 2011. Export revenues of the country were boosted due to high volumes and high international prices in the past three years. Reportedly, floodwaters have submerged some government as well as household rice stocks. As a result some rice shipments are expected to be delayed. The country does not produce wheat hence entire quantity (about 1.7 million tonnes) is imported.



**Thailand Cereal production**

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes			percent
Rice (paddy)	31 981	34 485	32 000	-7
Maize	4 080	3 930	4 197	7
Cereals nes	94	93	94	1
Others	74	74	74	0
<b>Total</b>	<b>36 229</b>	<b>38 582</b>	<b>36 365</b>	<b>-6</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets



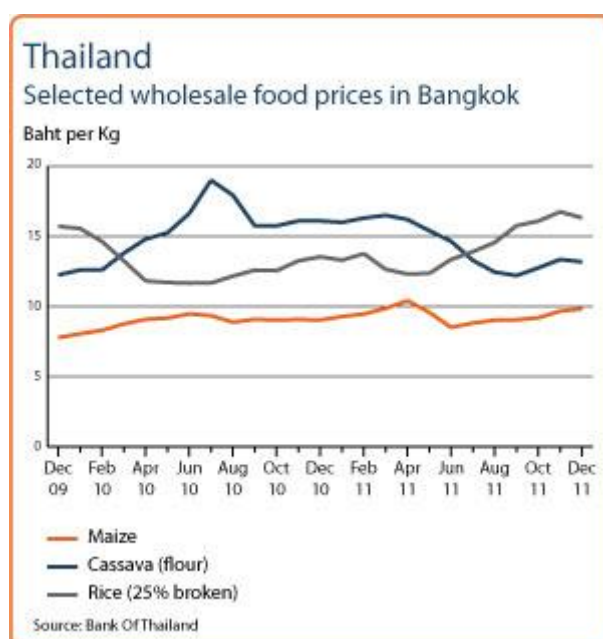
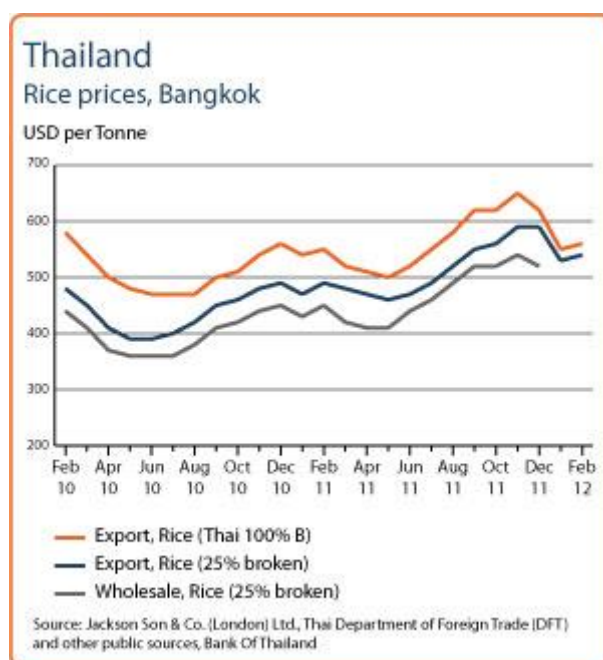
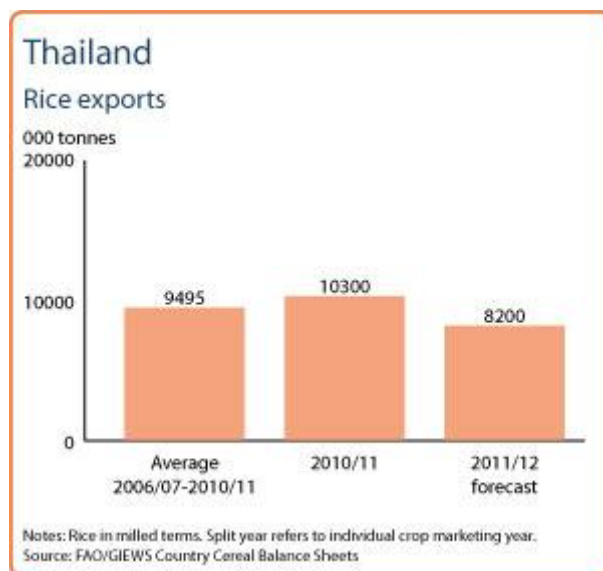
## Domestic prices for rice have been rising in last several months, but decreased slightly in December

In December 2011, domestic price for rice, which follows the trends in the export market, decreased slightly and was around 21 percent (16 percent in USD terms) above its level a year earlier. It has been increasing since June 2011 reflecting the government's decision to institute a new Paddy Pledging Program. Under the new scheme, in effect since 7 October, the government has set higher producer prices for rice in order to benefit the farmers and boost Thailand's agricultural sector. With these new higher prices in Thailand, reportedly, rice quantities are brought in through its porous borders from Cambodia, Laos and Myanmar.

Maize price on the other hand has shown a steady increase since June 2011 and in December 2011 was about 9 percent higher compared to December 2010.

## Overall food security in the country is satisfactory, but remains a major challenge for the flood-affected population

The overall food security situation in the country has been satisfactory. However, the recent onslaught of the devastating floods have affected some 2.4 million people and caused the loss of at least 320 lives. In addition to damages to agriculture sector, according to the Department of Labour Protection and Welfare, a total of 1215 industrial factories were submerged and at least 41 thousand workers have been affected. The Government and the humanitarian community are assisting affected population across the country.



Reference Date: 27-October-2011

### FOOD SECURITY SNAPSHOT

- Severe floods affect the 2011 main season crops, especially paddy
- Domestic prices of rice have been increasing in last several months mainly due to the Government's new paddy buying scheme
- Overall food security in the country is satisfactory, but remains a major challenge for the flood-affected population

### Severe floods affect the 2011 main season crops, especially paddy

A combination of heavy monsoon rains and tropical storms since late July and especially during last two months, have caused severe flash flooding in the North, Northeast, East and Central regions of the country. The Department of Disaster Prevention and Mitigation estimated that 60 out of 77 provinces were affected by the floods. Flood waters have inundated more than two-thirds of the country causing loss of life and livestock, submergence of rice and other crops, closure of hundreds of factories and severe damage to buildings and infrastructure. Official estimates indicate that, as of 14 October, the floods affected over 2.4 million people and damaged at least 1.6 million hectares of standing crops. The affected area covers 12.5 percent of total national cropped land. Although no precise crop damage estimates are yet available, the main rice season at the critical growth stage or ready for harvest is likely to be affected. The provisional FAO forecast for the 2011 main season rice crop has been revised down to 21 million tonnes, showing a decrease of 13.7 percent from the record level harvest of the same season a year before. Including the early forecast output of the next minor crop, FAO estimates the annual total production of paddy for 2011/12 at 32 million tonnes (equivalent to 21.2 million tonnes of milled rice), some 7 percent lower than the previous year's record harvest.

The main season paddy crop harvested from October onwards, accounts for approximately 60 percent of total annual paddy output.

According to the Ministry of Agriculture and Cooperatives, nearly 12.3 million of livestock are at risk.

### Floods may delay rice exports

Thailand is the world's largest rice exporter, with the estimated exports of about 10 million tonnes in 2011. Export revenues of the country were boosted due to high volumes and high international prices in the past three years. Reportedly, floodwaters have submerged some government as well as household rice stocks. As a result some rice shipments are expected to be delayed.

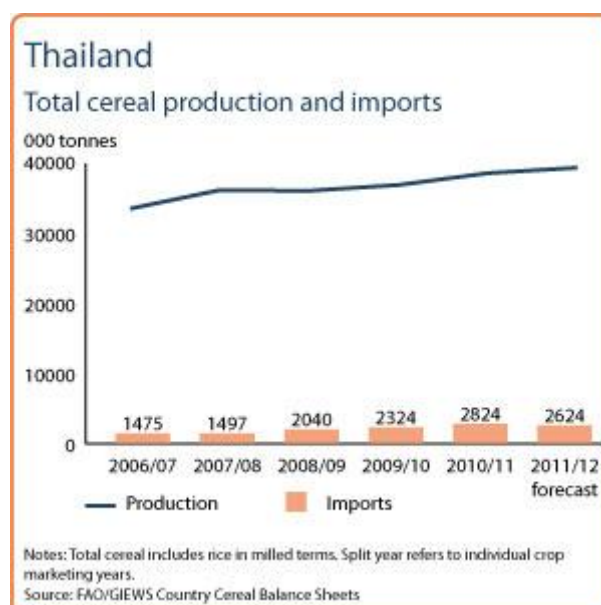
The country does not produce wheat hence entire quantity



### Thailand Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Rice (paddy)	31 981	34 485	32 000	-7
Maize	4 080	3 930	4 197	7
Cereals nes	94	93	94	1
Others	74	74	74	0
<b>Total</b>	<b>36 229</b>	<b>38 582</b>	<b>36 365</b>	<b>-6</b>

Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets





(about 1.4 million tonnes) is imported.

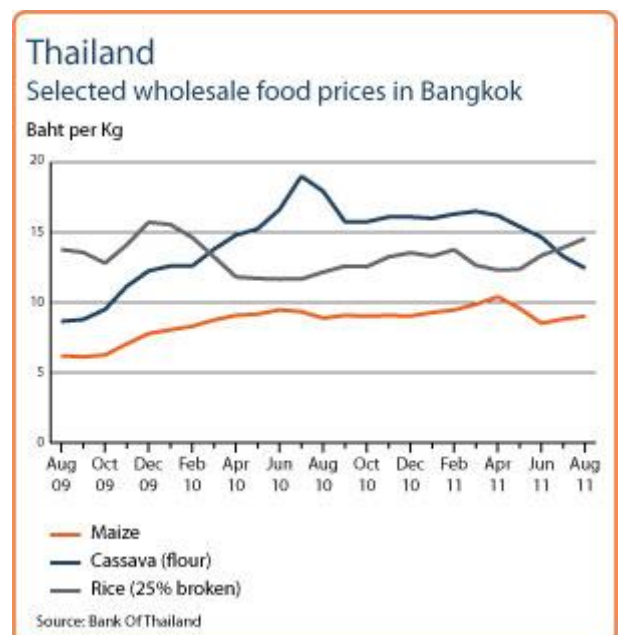
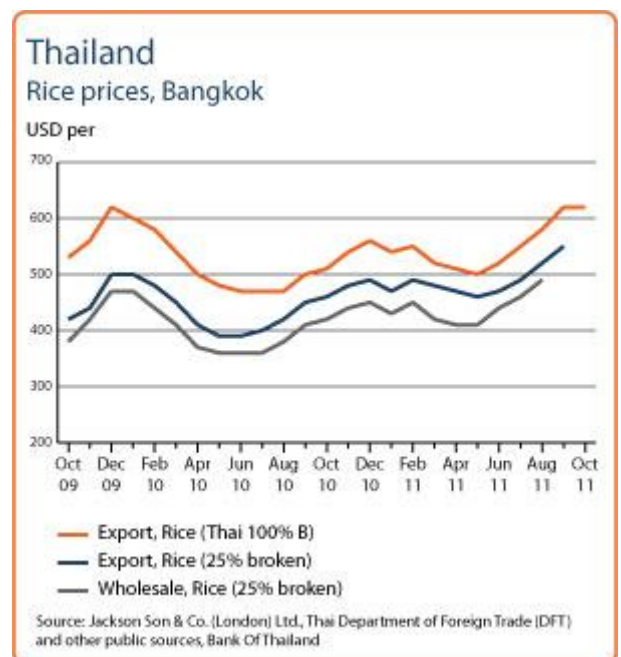
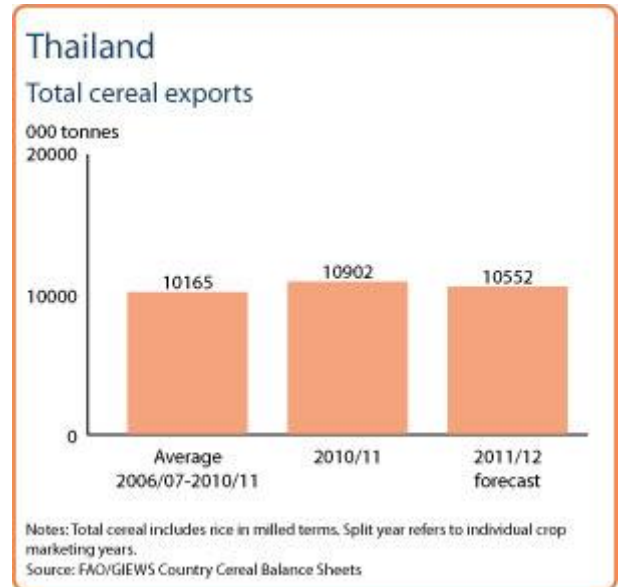
## Domestic prices for rice have been rising in last several months mainly due to the Government's new paddy buying scheme

In August 2011, domestic price for rice, which follows the trends in the export market, was around 20 percent (27 percent in USD terms) above its level a year earlier. It has been increasing since June 2011 reflecting the government's decision to institute a new Paddy Pledging Program. Under the new scheme, in effect since 7 October, the government has set higher producer prices for rice in order to benefit the farmers and boost Thailand's agricultural sector. With these new higher prices in Thailand, reportedly, rice quantities are brought in through its porous borders from Cambodia, Laos and Myanmar.

Maize price on the other hand has shown a steady increase since October 2009 and has further strengthened in last few months. However, the latest month price remains close to its level a year earlier.

## Overall food security in the country is satisfactory, but remains a major challenge for the flood-affected population

The overall food security situation in the country has been satisfactory. However, the recent onslaught of the devastating floods have affected some 2.4 million people and caused the loss of at least 320 lives. In addition to damages to agriculture sector, according to the Department of Labour Protection and Welfare, a total of 1215 industrial factories were submerged and at least 41 thousand workers have been affected. The Government and the humanitarian community are assisting affected population across the country.



Reference Date: 25-May-2011

### FOOD SECURITY SNAPSHOT

- Bumper harvest of the 2011 secondary season paddy is underway
- Rice exports in 2011 are estimated to remain strong reaching near record level
- Rice prices have steadily declined over last two years

### Bumper harvest of 2011 secondary season paddy is estimated

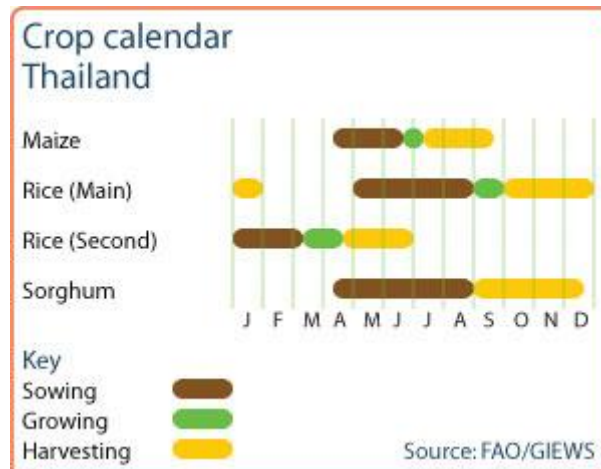
Harvesting of the secondary season paddy began late-April and will continue until end of June. The official forecast of this crop is put at a record level of 9.42 million tonnes, about six percent over the output of the 2010 corresponding season. Generally good weather and high export prices at planting time helped improve yields and planted area. The second season paddy production accounts for about 25 to 30 percent of annual output. The second season rice farming has gained importance in recent years due to higher yields. The 2010 main season paddy crop was, however, reduced to 22.2 million tonnes, down by 1 million tonnes of the previous year, due to poor rainfall distribution. Good planting rains were received a month or two late in different parts of the country. Good rains in August helped to some extent but the final harvest was disappointing. The annual total production of paddy for 2010/11 is estimated at 31.6 million tonnes (equivalent to 20.9 million tonnes of milled rice), 1.6 percent below the previous year's record harvest. The target (an early forecast) for 2011/12 is set at 36.7 million tonnes of paddy.

### Rice exports in 2011 are estimated to improve over the previous year

FAO estimates rice exports in 2011 at about 9.7 million tonnes, up from 9 million tonnes in 2010 just shy of the record level of about 10 million tonnes in 2008. Thailand is the world's largest rice exporter. Export revenues of the country were boosted due to high volumes and high international prices in past three years. The country does not produce wheat hence entire quantity (about 1.4 million tonnes) is imported.

### Domestic rice prices have declined in the past two years

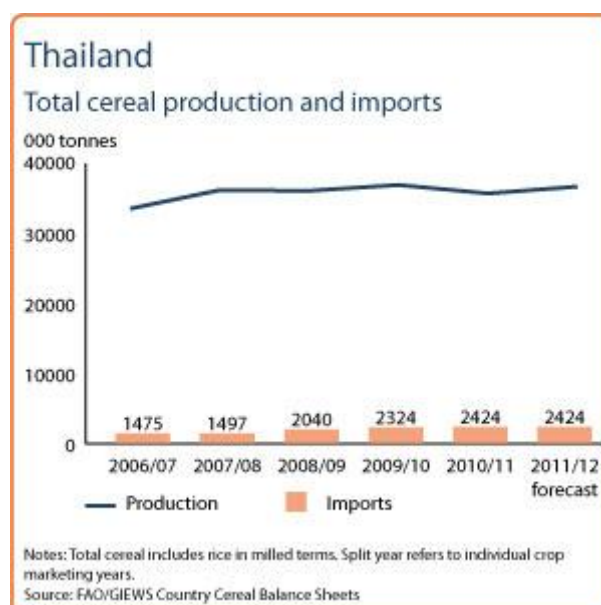
Domestic prices of main staple rice have been declining since the beginning of 2011. In March, rice prices were around 7 percent below their levels in January. This reflects the declining trend in the Thai export prices due to increased exportable supplies from the main 2010 harvest and competition among exporters. Maize prices on the other hand continue the steady climb since July 2010 in tandem with the international prices and growing domestic feed demand. In



### Thailand Cereal production

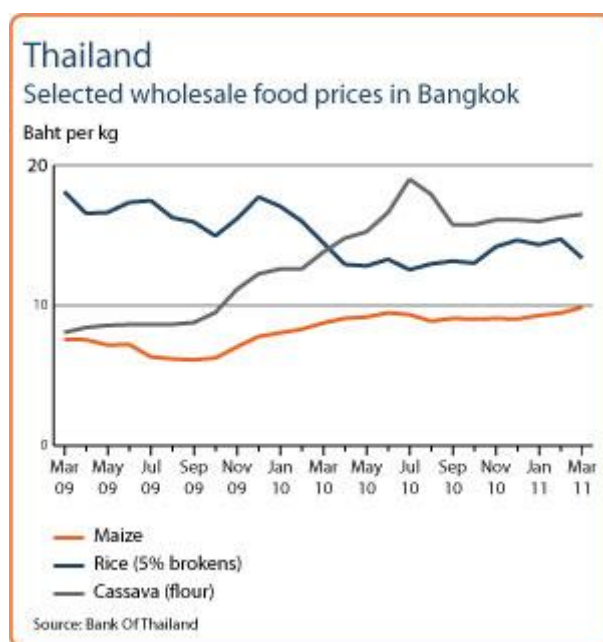
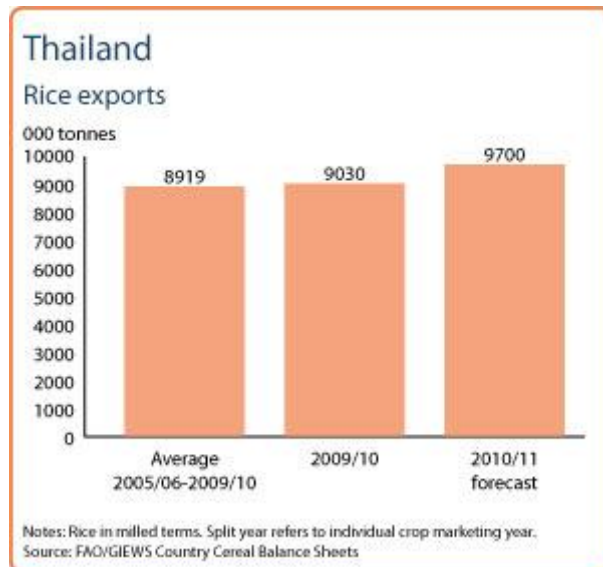
	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes		percent	
Rice (paddy)	31 160	32 116	31 597	-2
Maize	4 083	4 616	3 930	-15
Cereals nes	100	93	93	0
Others	163	147	148	1
<b>Total</b>	<b>35 426</b>	<b>36 898</b>	<b>35 694</b>	<b>-3</b>

Note: percentage change calculated from unrounded data.  
 Source: FAO/GIEWS Country Cereal Balance Sheets



March 2011, prices of maize were 13 percent above their levels of a year earlier.

Overall food security in the country is satisfactory.



Reference Date: 3-September-2010

### FOOD SECURITY SNAPSHOT

- Delayed planting of main season paddy crop due to late monsoon rains.
- Rice exports in 2010 are estimated at about 8.3 million tonnes, slightly below average.
- Rice prices have steadily declined over last two years

### Delayed planting of main season paddy crop due to late monsoon rains

Main season paddy crop is normally planted from May. However, good planting rains were received only a month or two late in different parts of the country. Good rains in August will help the situation but the final harvest is likely to be below average but showing some recovery over the drought-affected last year.

Due to much reduced precipitation since the beginning of February and so far in March, the Department of Disaster Prevention and Mitigation had declared 19 provinces in the North and Northeast and 13 in the Central and East regions as drought affected. The El Nino phenomenon is believed responsible for drier than usual weather in the Indochina region. Although most of the paddy crop in this season is irrigated, lack of rainfall also affected the total water supply for irrigation. In addition to adverse weather, damage by brown plant hopper was reported. In Thailand, the second season paddy production accounts for about 25 to 30 percent of annual output. The second season rice farming has gained importance in recent years due to high prices of the commodity. FAO estimated the 2009 second season paddy harvest at 7 million tonnes, down by about 1.4 million tonnes in 2008/09 or 1.8 million tonnes from 2007/08.

### Rice exports in 2010 are estimated at about 8.3 million tonnes, slightly below average

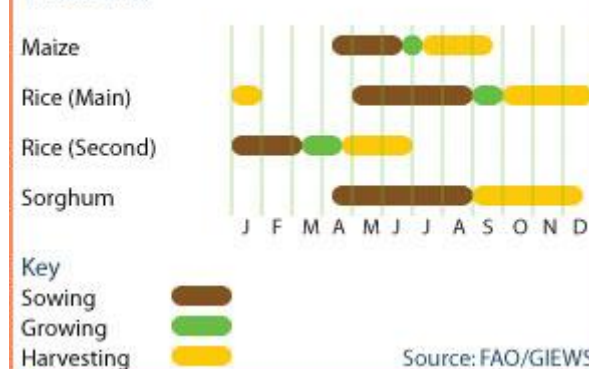
FAO estimates rice exports in 2010 at about 8.3 million tonnes, down from 8.5 million tonnes in 2009 and the record of about 10 million tonnes in 2008. Thailand is the world's largest rice exporter. Export revenues of the country were boosted due to high volumes and high international prices in 2008 and 2009.

Prices of rice in domestic market have, however, recently declined from the peak reached in April 2008, reflecting weaker import demand and increased competition among exporters.

The domestic price of rice, the main staple food in the country, declined steadily since the peak in April 2008.

Overall food security in the country is satisfactory.

### Crop calendar Thailand

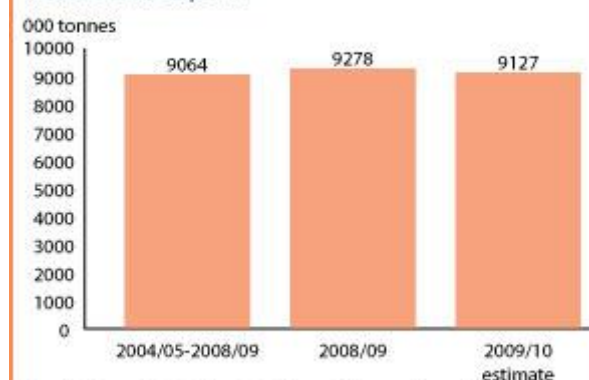


### Thailand Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Rice (paddy)	30697	29800	30000	1
Maize	3997	4250	3930	-8
Sorghum	172	171	164	-4
Others	113	112	112	0
<b>Total</b>	<b>34978</b>	<b>34333</b>	<b>34206</b>	<b>0</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

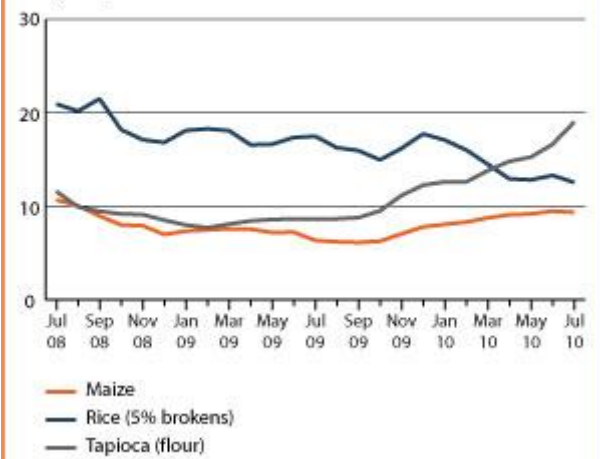
### Thailand Total cereal exports



## Thailand

### Selected wholesale food prices in Bangkok

Baht per kg



Source: Bank Of Thailand

Reference Date: 17-March-2010

### FOOD SECURITY SNAPSHOT

- 36 provinces in the North, Central and East regions are declared as drought affected for the secondary season
- With the reduced harvest forecast of the secondary crop, annual paddy production for 2009/10 is estimated at about 30 million tonnes, some 5 percent lower than the previous year's already reduced output
- High rice prices are beneficial to large producers but have affected negatively the food deficit farmers and other poor consumers

### 36 provinces in the North, Central and East regions are declared as drought affected

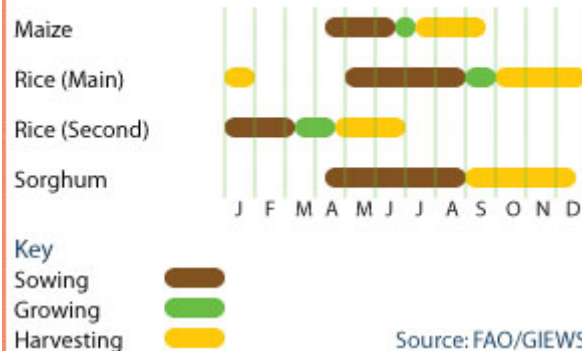
Due to much reduced precipitation since the beginning of February and so far in March, the Department of Disaster Prevention and Mitigation has declared 19 provinces in the North and Northeast and 13 in the Central and East regions as drought affected. The El Nino phenomenon is believed responsible for drier than usual weather currently in the Indochina region. Although most of the paddy crop in this season is irrigated, lack of rainfall is likely to reduce total water supply for irrigation. In addition to adverse weather, damage by brown plant hopper is reported. In Thailand, the second season paddy production accounts for about 25 to 30 percent of annual output. The second season rice farming has gained importance in recent years due to high prices of the commodity. Based on FAO estimates, the current second season paddy harvest may hover around 7 million tonnes, down by about 1.4 million tonnes in 2008/09 or 1.8 million tonnes from 2007/08.

The 2009/10 main season rice and sorghum harvested earlier in November-December were favourable. Consequently, 2009/10 rice production is estimated at 23 million tonnes, higher than the average of the last five years, but slightly below the record harvest of the 2007/08. With the anticipated downward adjustment in the current second crop, annual paddy production in 2009/10 is estimated at about 30 million tonnes (equivalent to 19.86 million tonnes of milled rice), about 5 percent lower than the previous year's already reduced output.

### Rice exports in 2010 are estimated at about 9 million tonnes, slightly higher than average

FAO estimates rice exports in 2010 at about 9.2 million tonnes, 8 percent larger than in 2009 but still below the record of about 10 million tonnes reached in 2008. Thailand is the world's largest rice exporter. Export revenues of the country

### Crop calendar Thailand

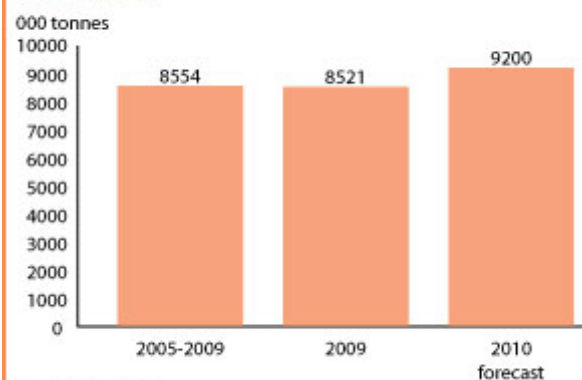


### Thailand Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Rice (paddy)	30444	31650	30000	-5
Maize	3990	4200	4250	1
Sorghum	156	176	171	-3
Others	112	111	112	1
<b>Total</b>	<b>34703</b>	<b>36137</b>	<b>34533</b>	<b>-4</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

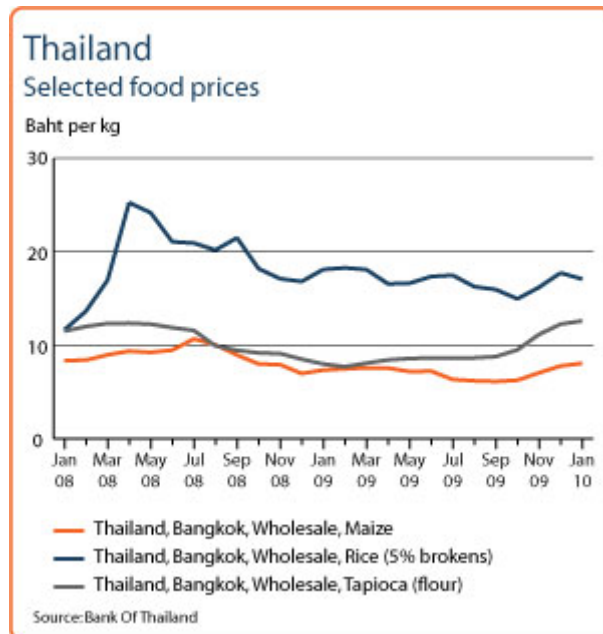
### Thailand Rice exports



have been boosted due to high volumes and high international prices. Prices have, however, recently declined from the peak reached in April 2008, reflecting weaker import demand and increased competition among exporters.

The domestic price of rice, the main staple food in the country, declined steadily by about 59 percent from the peak of April 2008 to the low point of October 2009. Price has moved up slightly in the last few months. Similarly to the pattern observed in many developing countries, nominal and real prices have remained significantly above the 2007 pre-crisis levels. High rice prices in Thailand have raised farm incomes, but adversely affected the poor in non-farming sectors.

Overall food security in the country is satisfactory.



Reference Date: 23-October-2009

### FOOD SECURITY SNAPSHOT

- Another bumper harvest of rice is expected from the current main 2009 crop.
- Rice exports in 2010 are likely to be slightly down from 2009 but remain strong.
- High rice prices are beneficial to large producers but have affected negatively the food deficit farmers and other poor in general.

### Another bumper harvest of rice is expected from the current 2009 crop

Harvesting of 2009 main season rice and sorghum is currently underway. Given the near normal monsoon season rains the 2009 rice production is preliminarily forecast at 20.6 million tonnes, below the record of the previous two years, but higher than the average of the last five years. Land preparation for the second season paddy crop has just started.

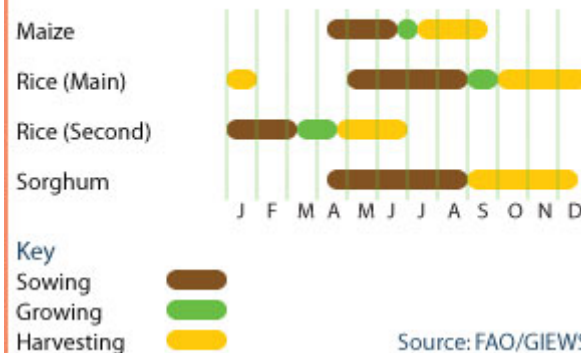
### Rice exports in 2010 are likely to be slightly down from 2009 but remain strong

Thailand is the world's largest rice exporter. Rice exports are estimated at about 8.6 million tonnes in 2010, similar to that of 2009 but down from the near record level of about 10 million tonnes in 2008. Export revenues of the country have been boosted due to high volumes and high international prices. They have, however, recently declined from the peak reached in April 2008, reflecting weak import demand and reduced prices.

Domestic price of rice, the main staple food in the country, declined by about 20 percent in August 2009 as compared to August 2008 and 35 percent from the peak in April 2008. Similar to the pattern observed in many developing countries, nominal and real prices in 2009 have been coming down but remain significantly above the pre-crisis period of 2007. High prices in Thailand have raised farm incomes, but have adversely affected the poor in non-farming sectors.

Overall food security in the country is satisfactory.

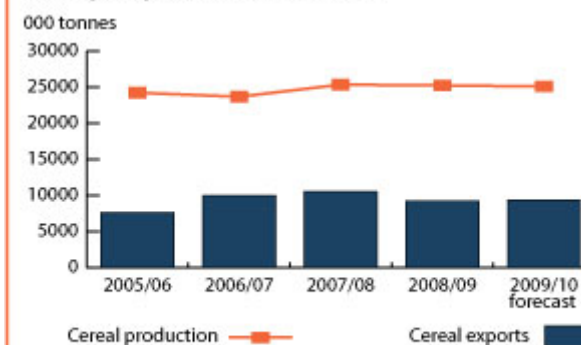
### Crop calendar Thailand



### Cereal production and exports Thailand

Cereal production	2004-2008	2008	2009	change* 2009/2008
	average		forecast	
	000 tonnes			percent
Rice (milled)	20119	20776	20588	-0.9%
Maize	3990	4200	4250	1.2%
Sorghum	156	176	171	-2.8%
Other	110	111	112	0.9%
<b>Total Cereals</b>	<b>24376</b>	<b>25263</b>	<b>25121</b>	<b>-0.6%</b>

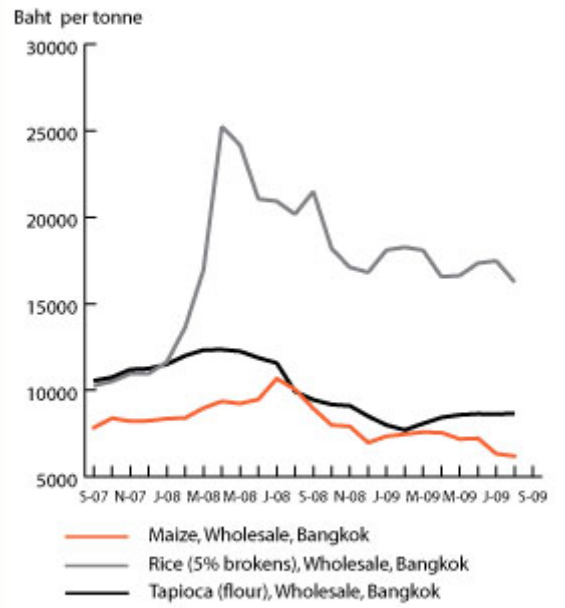
\* Percentage change calculated from unrounded data.



Source: FAO/GIEWS Country Cereal Balance Sheets



## Thailand Selected commodity prices



Source: Bank Of Thailand