

4.6.8 Thailand

4.6.8.1 Demographics

The total number of poultry farms in Thailand was estimated at 184,089. The largest share of poultry farms were duck farms, accounting for 77% or 142,060 farms. The average size for a duck farm was 99 head. Household or micro-producer chicken farms were the second largest share of poultry farms in Thailand, representing about 20% or 35,947 poultry farms. The average size of a micro-producer chicken farm was 795 head. The remaining 3%, or 6,082 poultry farms were commercial chicken farms. These operations had 42,287 head on average.

Thailand poultry production experienced an uneven growth from 2010 to 2021, reaching its highest volume in 2013 (1.8 million metric tons). But overall, in 2021 poultry production in Thailand (1.7 million metric tons) was up 35% from 2010.

Thailand's poultry consumption on the other hand, declined 11% from 630,530 metric tons in 2010 to 561,430 metric tons in 2021. Thailand's poultry production was 3 times higher than poultry consumption in 2021, leaving a relatively large margin for exports (see Figure 239).

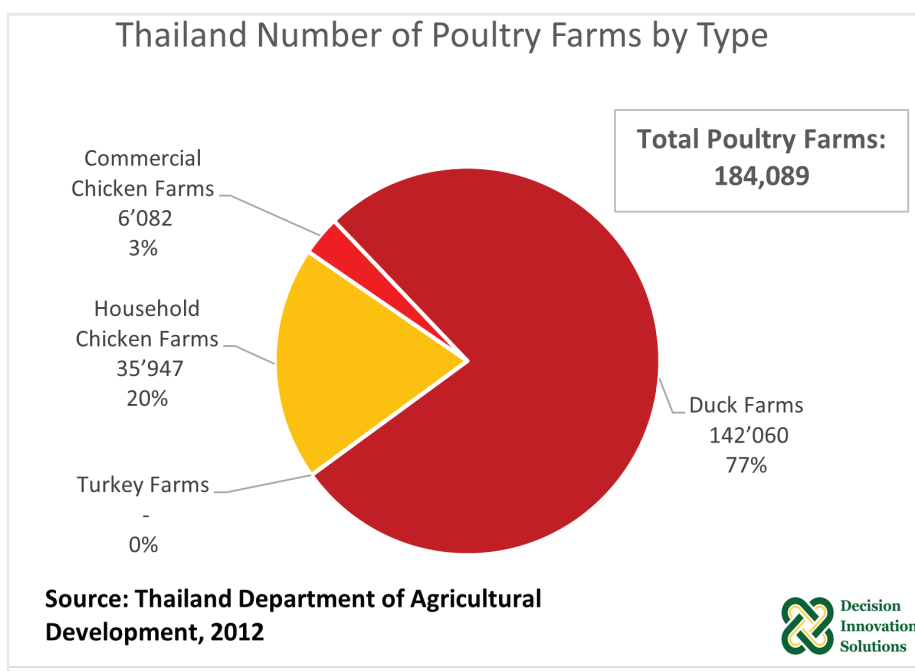


Figure 238. Thailand number of poultry farms by type

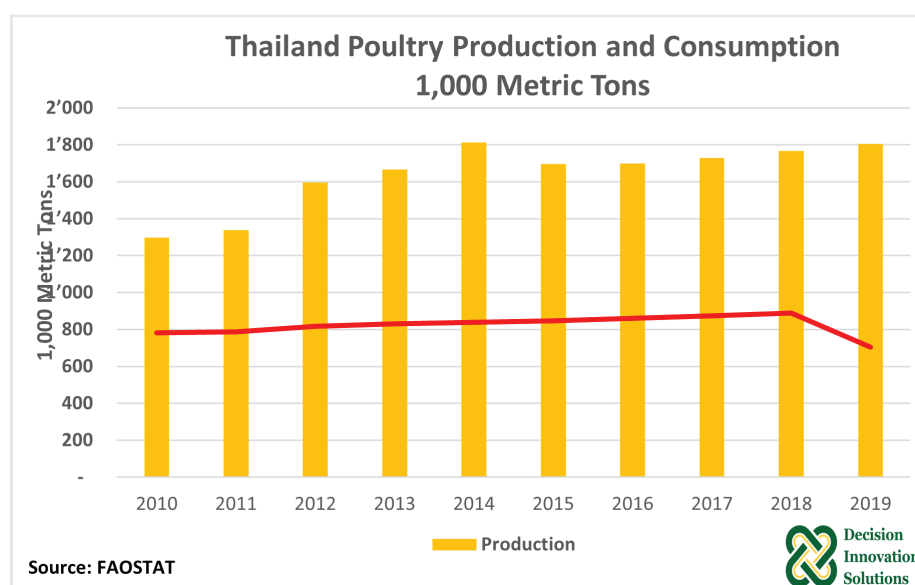


Figure 239. Thailand poultry production & consumption

Of the 299.8 million head in Thailand's poultry stocks, 285.8 million (95%) were chickens, and 14.1 million (5%) were ducks (Table 72). Compared to 2010, chicken stocks increased 23% and duck stocks declined 14% by 2020.

THAILAND POULTRY STOCKS, SLAUGHTER, AND PRODUCTION				
1,000 head	Chickens	Ducks	Turkeys	Total
Stocks	285'764	14'085		299'849
Producing Animals/Slaughtered	1'272'360	27'860		1'300'220
Production (1,000 MT)	1'782	61		1'843

Sources: FAO, 2020

Table 72. Thailand poultry stocks, slaughter & production

Total poultry slaughter in 2020 was 1.3 billion head. Chickens represented an estimated 98% (1.3 billion head) of poultry slaughter. Ducks represented the remaining 2% (27.9 million head) of poultry slaughter. Compared to 2010, chicken slaughter in Thailand increased 31% in 2020, and duck slaughter declined 46% compared to 2010.

Thailand's poultry production included 1.8 million metric tons of chicken and 61,000 metric tons of duck. Compared to 2010, chicken production increased 46% and duck production declined 21%.

4.6.8.2 GDP and Value of Production

The total value of GDP in Thailand was an estimated \$501.8 billion in 2020. Approximately 94% of the total GDP is derived from non-agricultural production sectors. The crop production sector represented 4% or \$21.3 billion of the total GDP. Red meat production was the second largest agricultural production sector representing about 1% or \$4.5 billion. Chicken production also represented about 1% or \$3.1 billion of the total GDP. Less than 1%, or nearly \$242.2 million was represented by the duck production sector. Turkey production was the smallest of Thailand's agricultural production sectors with an estimated \$4.0 million.

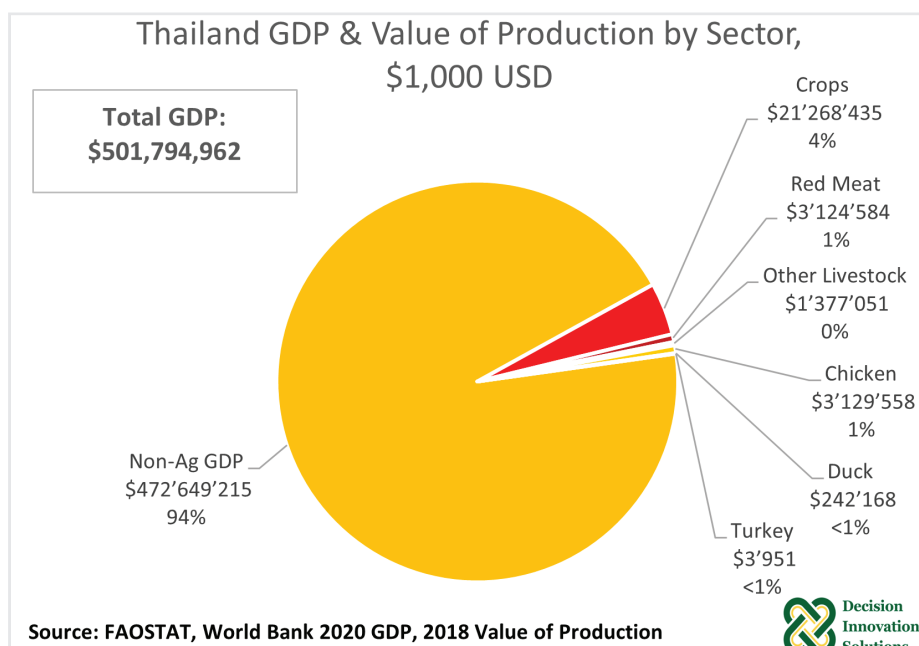


Figure 240. Thailand GDP & value of production by sector

The combined (direct and indirect) effects of agricultural production in Thailand are estimated to be \$58.4 billion. Of this amount, \$8.3 billion comes from the poultry industry, with \$7.7 billion from chicken meat production, \$596 million from duck production, and \$9.7 million from turkey production. Agriculture pays a net value of \$465 million in taxes, \$64 million of which is estimated to be from the poultry industry (Table 73).

ECONOMIC EFFECTS - THAILAND (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$29'145'747	\$29'278'654	\$58'424'401	\$465'772
Livestock	\$7'877'312	\$7'913'233	\$15'790'545	\$125'886
Poultry	\$3'375'677	\$4'935'240	\$8'310'917	\$64'007
Chicken	\$3'129'558	\$4'575'414	\$7'704'972	\$59'340
Duck	\$242'168	\$354'049	\$596'217	\$4'592
Turkey	\$3'951	\$5'777	\$9'728	\$75

Source: FAOSTAT, OECD Input-Output Tables. *Taxes is equal to total taxes net of subsidies

Table 73. Economic effects - Thailand

4.6.8.3 Labor

An estimated 39.0 million people worked in Thailand's labor force in 2020 (Table 74). Approximately 27.1 million were employed in non-agricultural sectors. Nearly 12 million people worked in the agricultural sector. Of that total, 113,703 people worked in poultry production.

In 2020, an estimated 109,220 people were employed in the meat processing sector in Thailand. The total wages earned from meat processing was \$408.0 million. Poultry meat processing was the largest share of meat processing with 56,719 jobs and \$211.9 million in wages earned. Livestock meat processing accounted for 52,501 jobs and \$196.1 million in wages earned.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - THAILAND			
	Total	Female	Male
Total Country Labor	39'036'695	17'894'477	21'142'218
Non-Agricultural Labor	27'076'184	12'983'363	14'092'821
Agricultural Labor	11'960'511	4'911'114	7'049'397
Total Non-Poultry Agricultural Labor	11'846'808		
Total Poultry Labor	113'703		
Chicken Labor	56'852		
Turkey Labor	-		
Other Poultry Labor	56'852		
		Wages (\$1,000 USD)	
Total Meat Processing Labor	109'220	\$408'038	
Livestock Processing Labor	52'501	\$196'138	
Poultry Processing Labor	56'719	\$211'900	

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 74. Agricultural labor force characteristics - Thailand

4.6.8.4 Cost of Production

Thailand's cost of feed (67%) represented the largest share of broiler production total costs in 2017. Day-old chicks ranked as second largest share of total cost at 17%, followed by other variable costs (heating, electricity, litter, and animal health, 7%) and housing (6%). Labor cost accounted for 2% of total costs. The costs at farm level for insurance, bookkeeping, consultancy, telephone, and transport represented 1% of total costs (see Figure 241).

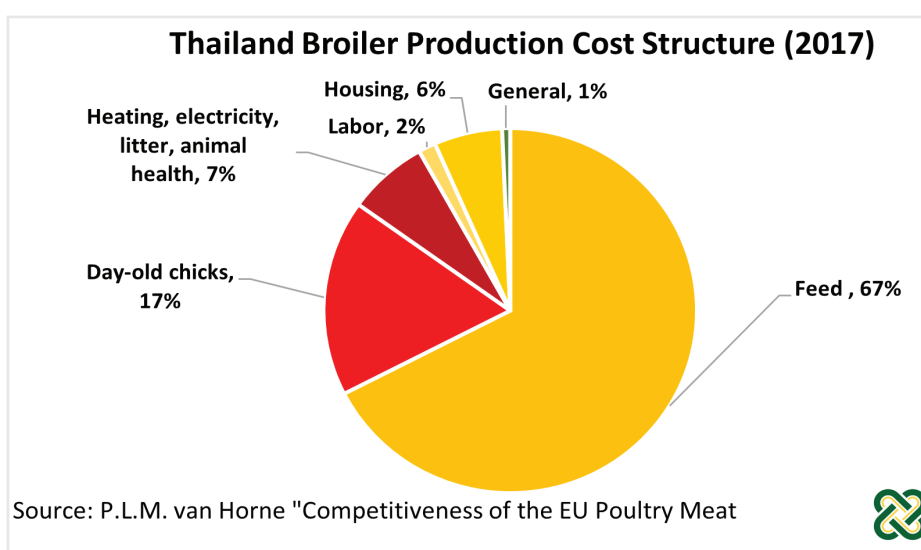


Figure 241.

Thailand broiler production cost structure

4.6.8.5 Trade

Thailand total value of poultry products exports was estimated at \$3.4 billion in 2020. Most of Thailand poultry exports were cooked/prepared poultry products (\$2.4 billion or 73% of the total value market). In 2020, Thailand poultry export value to Japan alone totaled more than \$1.8 billion, of which, \$1.4 billion consisted of cooked/prepared poultry products.

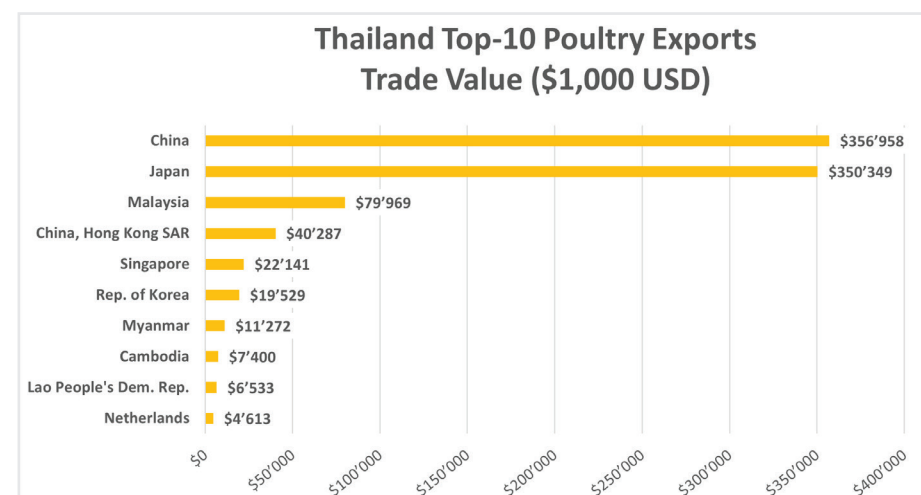


Figure 242.

Thailand top 10 poultry exports, trade value

Thailand's poultry exports to the United Kingdom (\$543 million), and China (\$357.0 million) together made up 27% of the total value of poultry exports in 2020. (Figure 242 and Figure 243). Thailand's exports to the United Kingdom consisted mainly of cooked/prepared poultry products.



Figure 243. Thailand poultry export flows

Thailand Top-10 Poultry Imports Trade Value (\$1,000 USD)

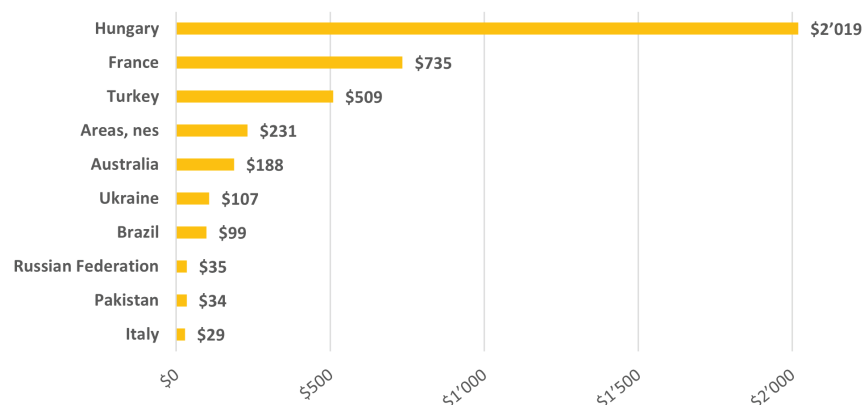


Figure 244. Thailand top 10 poultry imports, trade value

Hungary was the largest supplier of Thailand's poultry meat imports in 2020. In a distant second and third place were France and the USA. The value of poultry imported from Hungary was estimated at \$2.2 million, which represented about 28% of total value of Thailand's poultry imports (\$7.1 million) (Figure 244 and Figure 245). Challenges to exporting poultry meat to Thailand may include its use of non-transport import permit controls and high WTO bound rates of import tariffs which range from 30-40%²⁰.

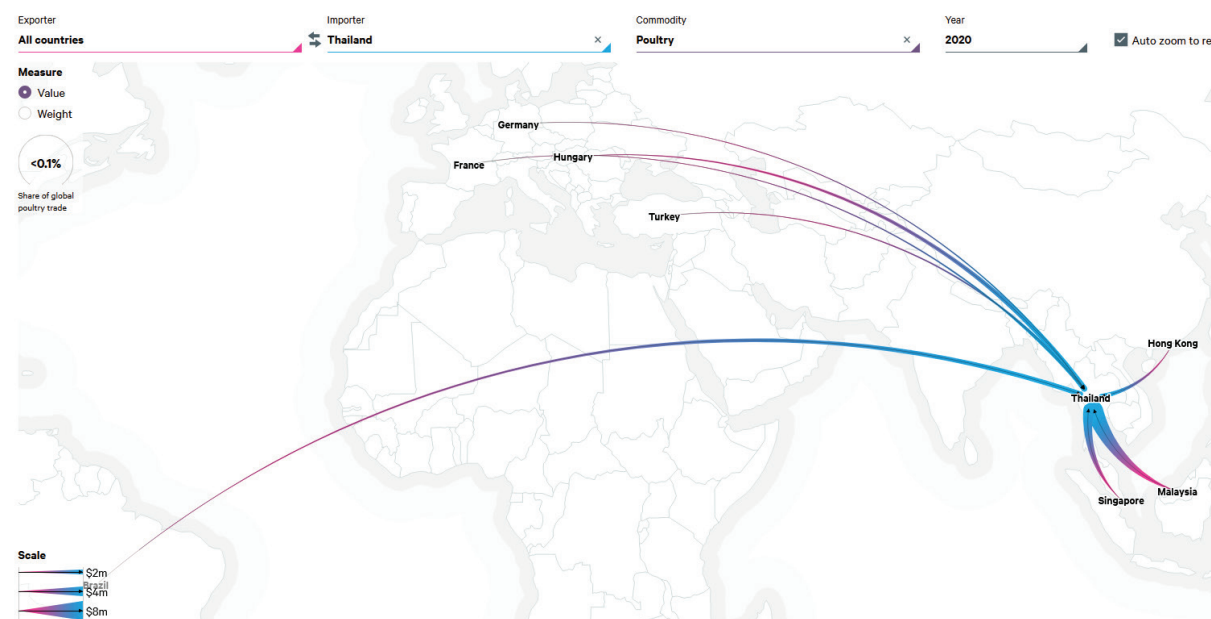


Figure 245. Thailand poultry import flows

20 USDA FAS, Poultry and Products Annual- Thailand, Sept. 1, 2021