

CEFS FACT SHEET ON THAILAND



ABOUT THAILAND



9%
share of global
sugar exports



75%
of production
exported

Sugar sector benefiting from **highly regulated political framework and market protection.**

World's second-largest sugar exporter

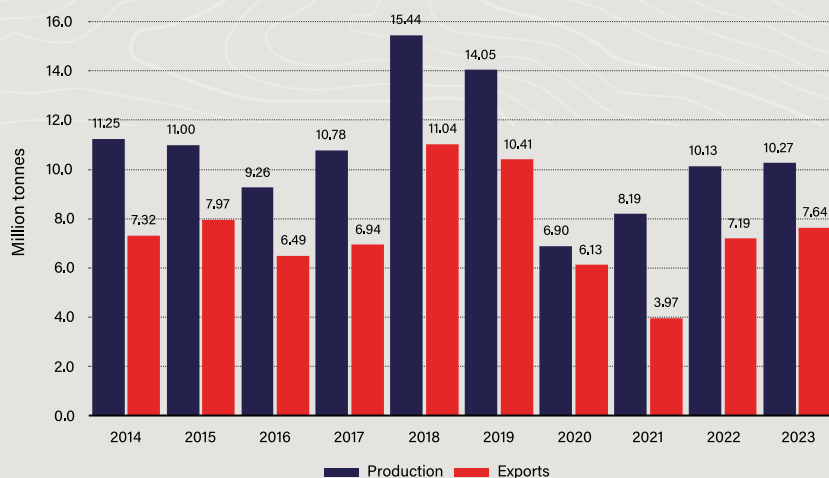
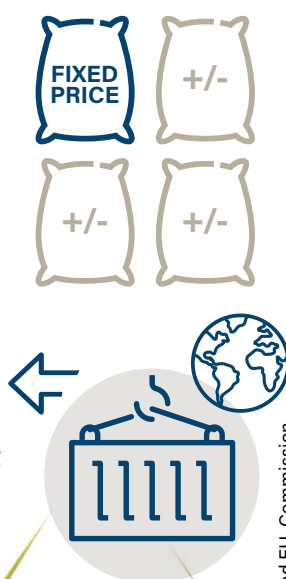


Figure 1: Thailand's sugar production compared to exports, 2014-2023. Source: International Sugar Organisation (2024).

SUGAR PRICE SUPPORT

- Minimum sugar prices for 25% of non-exported production allows Thailand to export sugar even when world market prices are low.
- Vietnam has introduced anti-dumping and anti-subsidy duties for imports of sugar from Thailand.
- Imports are limited through different means to control internal prices and the market.
- The minimum sugar price for around 25% of the total production allows Thai sugar industry to export on the world market even in the case of low world market prices.



Source: ISO and EU-Commission

FIXED SUGAR PRICES 2019




WHITE SUGAR:
US\$ 529/t (17,250 Baht/t)


CEFS FACT SHEET ON THAILAND



CANE GROWERS SUPPORT

System of direct support where preliminary cane price, calculated at the beginning of the sugar campaign on the basis of the forecast sugar price, differs from final cane price:

- 

If final cane price is above the preliminary price, the sugar mill will compensate the cane grower with an additional payment for the cane.
- 

If the final cane price is lower than the preliminary price paid, miller compensated by the Government through the Cane and Sugar Fund (CSF), which will cover the difference.

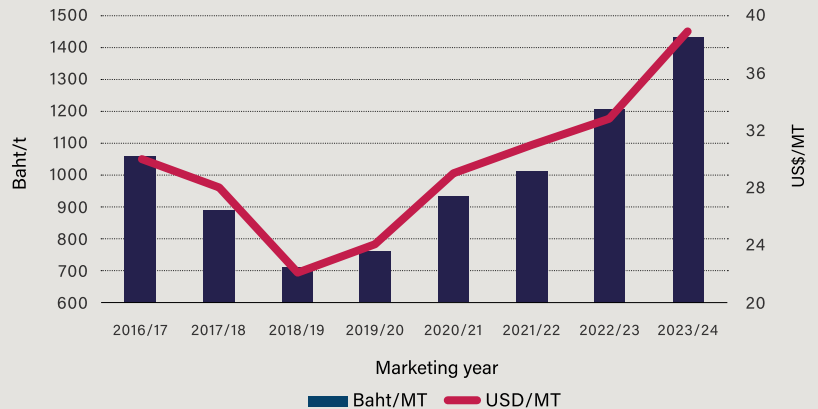


Figure 2: Minimum sugarcane prices evolution under the Thai government sugarcane price support programme, 2016/17-2023/24. Source: USDA.



Direct support to growers through the CSF and additional direct payments for sugarcane = **>US\$ 1.7 billion over 10 years**

Source: Meriot, 2022

CANE BURNING



Despite being banned, pre-harvesting sugarcane burning is a widespread agricultural practice in Thailand, used for almost 30% of production.



Cane burning has severe consequences for air quality and the health of field workers.



used for almost 30% of production

Source: S&P Global, WTO, USDA (2024).