



การศึกษาศักยภาพเศรษฐกิจสินค้าเกษตร
เพื่อรองรับการเป็นประชาคมเศรษฐกิจอาเซียน
กรณีศึกษา: สินค้าข้าว

The Economic Potentials of Agricultural Commodities
to the ASEAN Economic Community
: A Case Study of Rice



สำนักวิจัยเศรษฐกิจการเกษตร
สำนักงานเศรษฐกิจการเกษตร
กระทรวงเกษตรและสหกรณ์
เอกสารวิจัยเศรษฐกิจการเกษตร เลขที่ 116
มีนาคม 2561

BUREAU OF AGRICULTURAL ECONOMIC RESEARCH
OFFICE OF AGRICULTURAL ECONOMICS
MINISTRY OF AGRICULTURE AND COOPERATIVES
AGRICULTURAL ECONOMIC RESEARCH NO. 116
MARCH 2018

Abstract

The Economic Potentials of Agricultural Commodities to the ASEAN Economic Community : A Case Study of Rice aims to examine production, marketing and policies of rice as well as competitiveness of Thai rice comparing with other ASEAN member countries in order to determine Thai rice strategic plans. Rice export data during 2006-2015 and various tools including Revealed Comparative Advantage (RCA), Boston Consulting Group Matrix (BCG matrix), SWOT analysis and TOWS Matrix were employed in this study. The results are as followings:

Comparing rice situation among ASEAN countries, Thailand has the second-largest rice harvesting area after Indonesia, ranks 3rd for rice production, below Indonesia and Vietnam, and comes 6th regarding rice yield. Thailand places 6th in terms of rice demand but 1st in ASEAN and 2nd in the world for rice exports. Major outlets of Thai rice are Africa and Asia. Vietnam ranks a remarkable 2nd in ASEAN and 3rd in the world for rice exports. Vietnam has the highest share in the ASEAN rice market. Indonesia, Malaysia and the Philippines are the main rice importers in ASEAN.

The results from the RCA Analysis revealed that Thailand, Vietnam, Cambodia, Myanmar and Laos have a comparative advantage in rice exports to the world market for the period of 2006-2015. However, comparative advantages of Thailand and Vietnam are declined while Cambodia, Myanmar and Laos have an increased comparative advantage in such period. Regarding ASEAN market, comparative advantages of Thailand, Vietnam and Cambodia are observed while Vietnam has a decreased comparative advantage in rice exports.

For the BCG Matrix, the results indicate that Thailand and Myanmar stand at Dogs position while Cambodia and Laos are at Question Marks position in ASEAN and world rice markets. Vietnam has good positioning as Cash Cow in the ASEAN rice market but Dogs position in the world rice market.

The SWOT Analysis and TOWS Matrix conclude the strategic plan of Thai rice to the ASEAN Economic Community in 4 areas; 1) Offensive strategies: research and development on rice varieties, new market expansion and market leaders in top-quality rice or niche market, 2) Defensive strategies: development of climate-resilient rice varieties, rice trade cooperation in ASEAN for food security, 3) Adjusted strategies: increasing productivity, strengthening farmers organization, increasing harvesting and post harvesting efficiency, and 4) Survived strategies: promotion of rice production and rice certification, rice processing support as well as farm mechanization promotion. In addition, Thailand should promote various kind of rice export products as well as closely monitor rice production and prices of other ASEAN exporting countries to stay competitive.