

# Thai Swine Industry after African Swine Fever Outbreak in 2022

**Suwanna Sayruamyat**

Department of Agricultural and Resource Economics,

Faculty of Economics, Kasetsart University, Bangkok, Thailand

Email: [suwanna.s@ku.th](mailto:suwanna.s@ku.th)

# ASF Situation in Thailand



Department of Livestock Development (DLD) announced in January 2022 the confirmation of ASF in pet pigs in Bangkok.



A total of 114 outbreaks have been reported in 35 out of 77 provinces/special administrative area were reported during the epidemic.

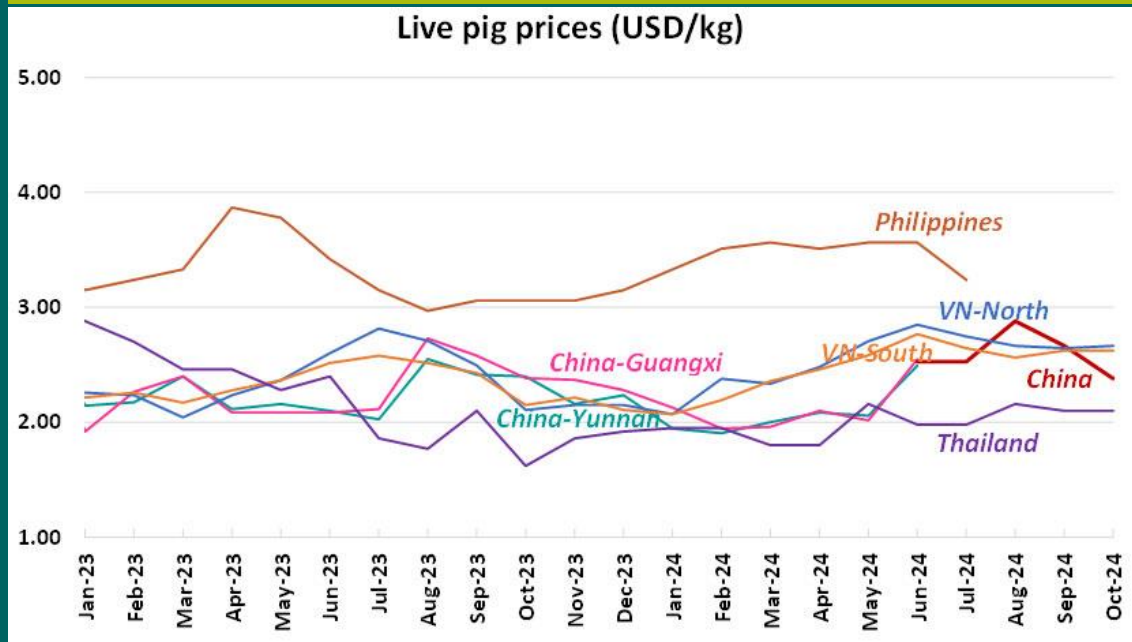


The latest reported outbreak occurred in Luang Nuea Village, Doi Saket District, Chiang Mai Province in June 2024.

# DLD Thailand actions

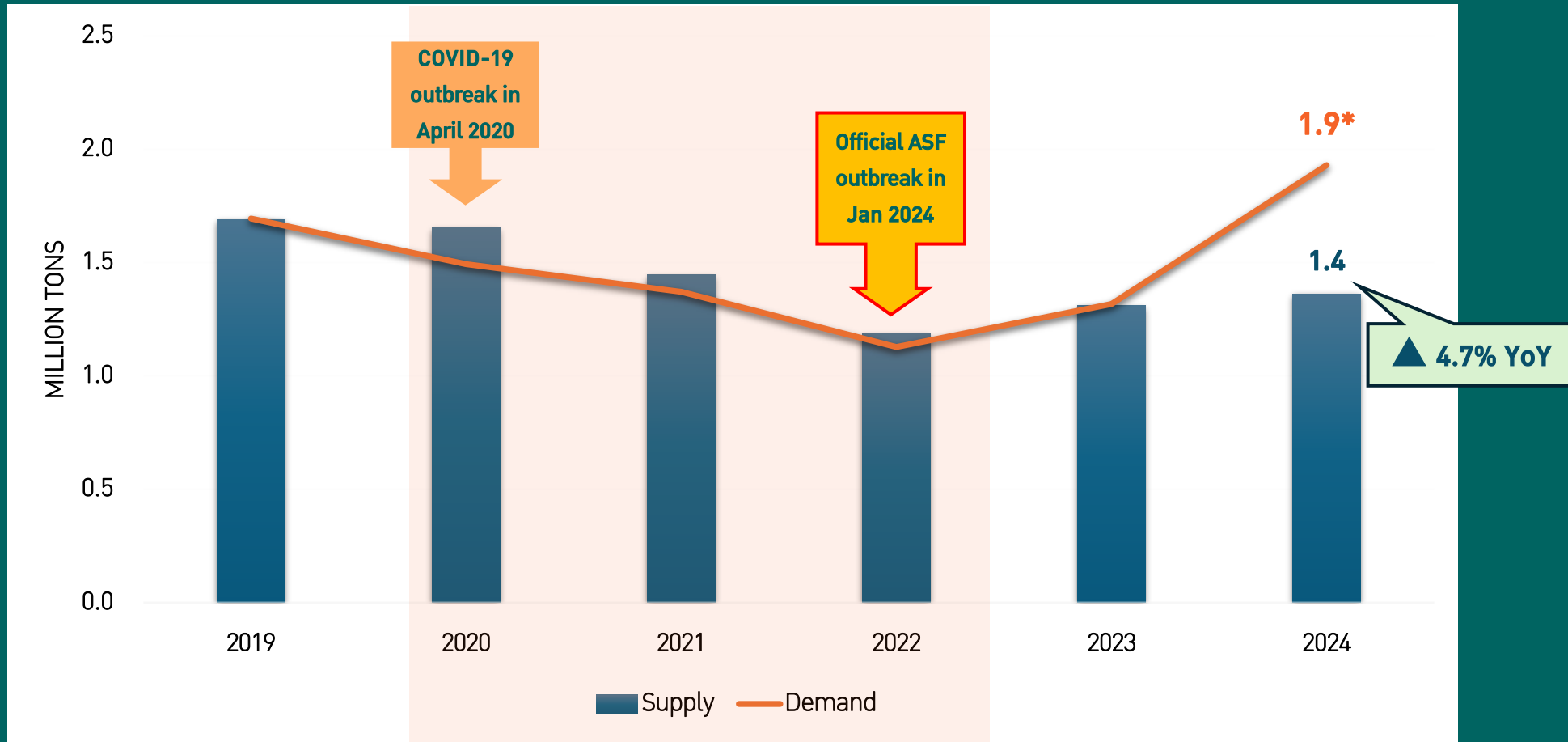
1. DLD implements ASF contingency plan with clinical practice guidelines while the provinces monitor and follow-up the situation in accordance with the guidelines.
2. DLD is promoting the improvement of disease prevention systems and biosafety on farms according to media and also raising awareness and strengthening border control to stop illegal import of pork products from affected countries.

Live pig prices in China, Viet Nam, Cambodia, the Philippines and Thailand (USD/kg)



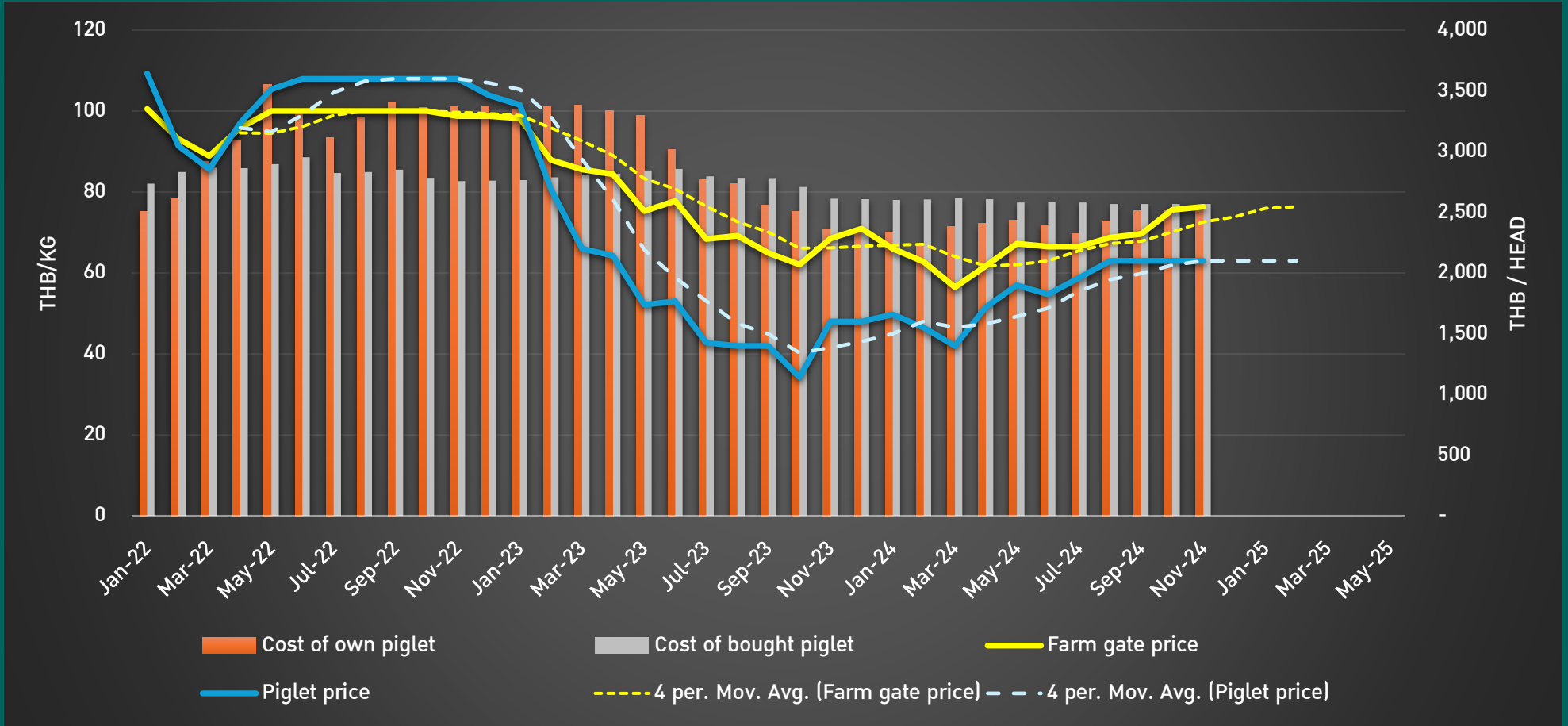
<https://www.fao.org/animal-health/situation-updates/asf-in-asia-pacific/en>

# Thai Pork Supply VS Demand in 2019 - 2024



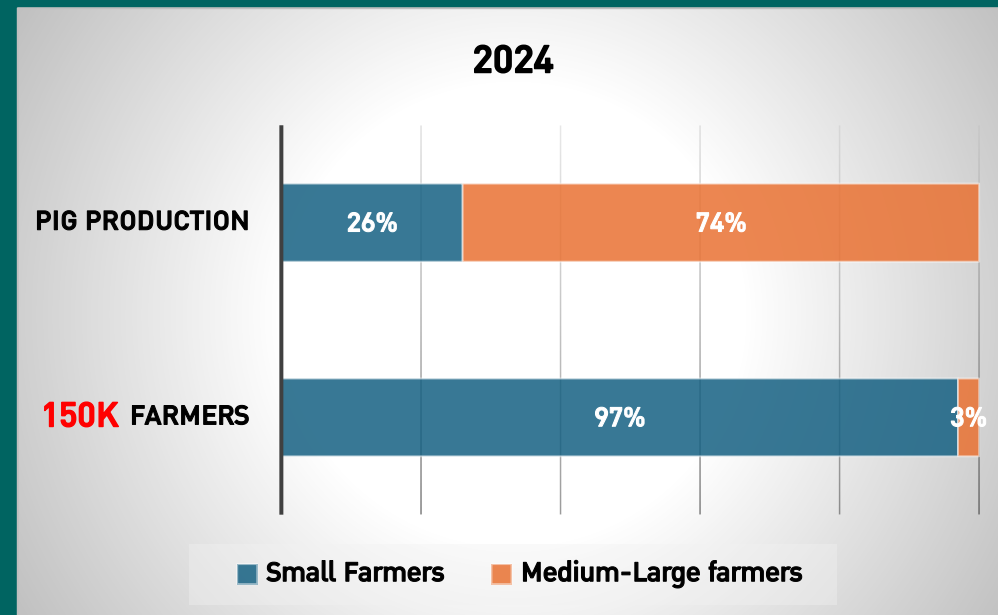
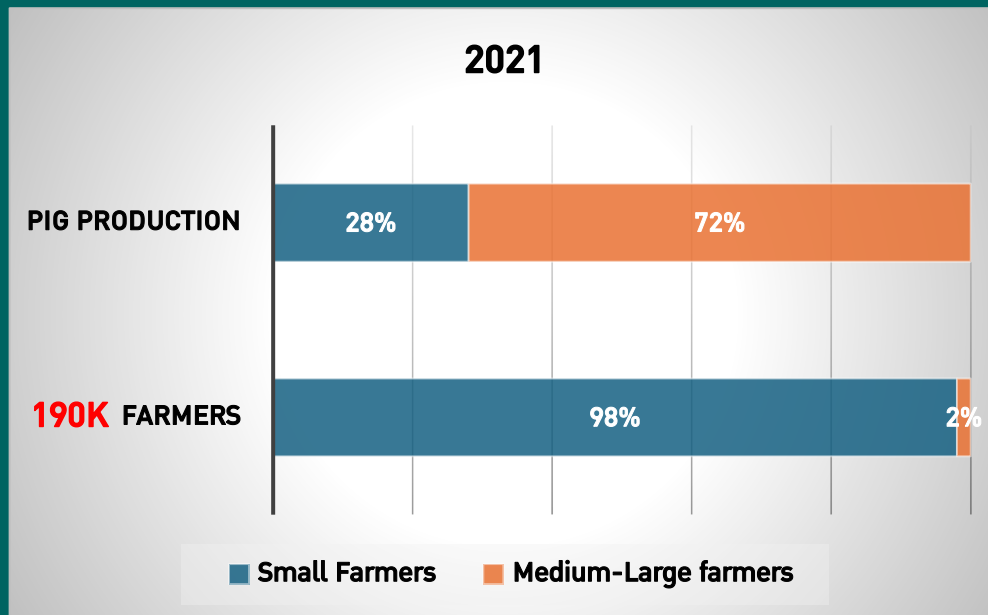
Sayruamyat. 2022. Thai Swine Industry during African Swine Fever Outbreak in Asia. FFTC-AP Link: <https://ap.fttc.org.tw/article/3011>

# Cost and Price After the Outbreak 2022



# ASF outbreak in Thailand resulted in a 21.29% reduction in swine raisers from 2021.

- The number of smallholder farmers has decreased to 86% from pre-outbreak levels.
- Most of the supply comes from medium and large-scale farms.



Source: Kresearch (2024) and DLD (2024)

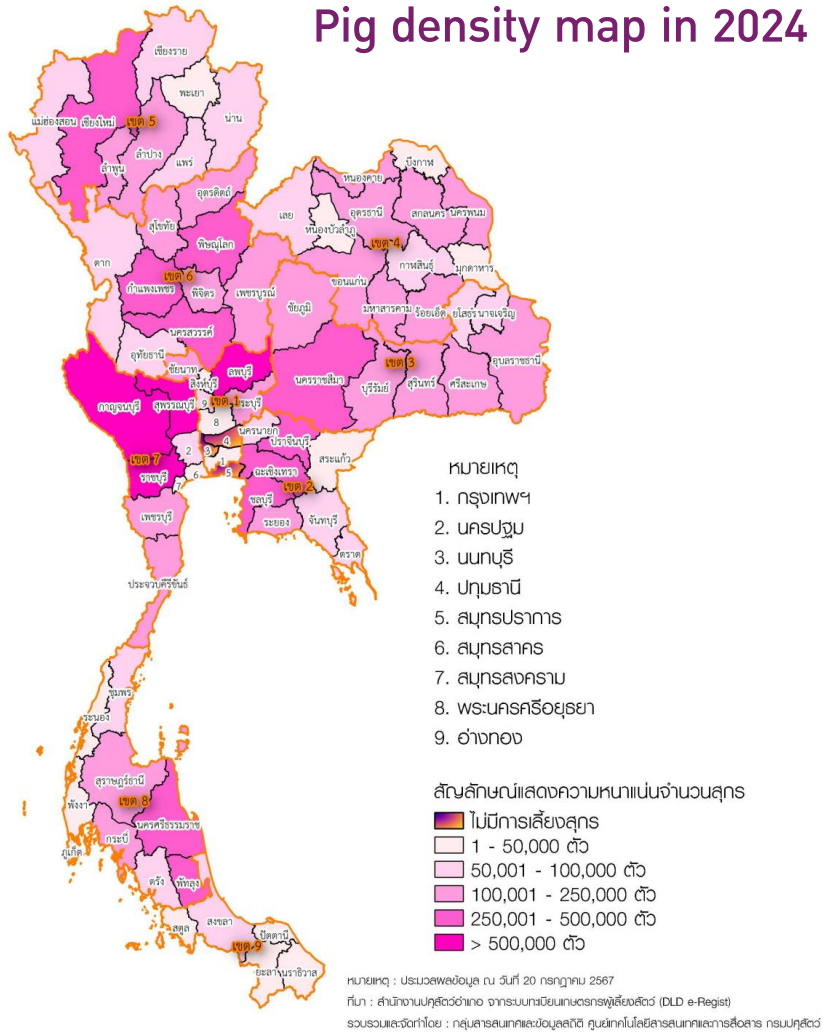
# The number of medium and large farm size increase

Farm size	2021 (Farms) (%)	2024 (Farms) (%)	% Change
Very small (1-50 heads)	172,528 (91.2%)	133,580 (89.7%)	- 22.6%
Small (51-500 heads)	12,477 (6.6%)	10,971 (7.3%)	-12.0%
Medium (501 – 5,000 heads)	3,856 (2.0%)	4,002 (2.7%)	3.79%
Large (5,001 heads and above)	291 (0.2%)	328 (0.2%)	12.7%
Total	189,152 (100%)	148,881 (100%)	

Source: DLD Thailand (2021, 2024)

# Percent change in no. of farm size between 2021 and 2024

Pig density map in 2024



	Farm size			
	Very small	Small	Medium	Large
Region 1	-44.5	-55.7	-7.9	114.3
Region 2	-33.0	-40.3	-21.6	-1.6
Region 3	-19.7	-9.6	38.9	44.4
Region 4	-8.3	9.3	65.2	-14.3
Region 5	-15.2	12.6	-5.8	-15.4
Region 6	-40.0	-28.2	-3.4	81.0
Region 7	-35.9	-23.8	-14.8	-9.5
Region 8	-39.3	-6.3	4.5	-75.0
Region 9	-25.5	-28.7	8.1	0.0
Total	-22.6	-12.1	3.8	12.7

- The trend indicates a decrease in the number of small farms.
- The trend indicates an increase in medium and large farm sizes.
- Resulted in contract farming for medium and large farm size increase, while individual farrow-to-finish enterprise decreases.

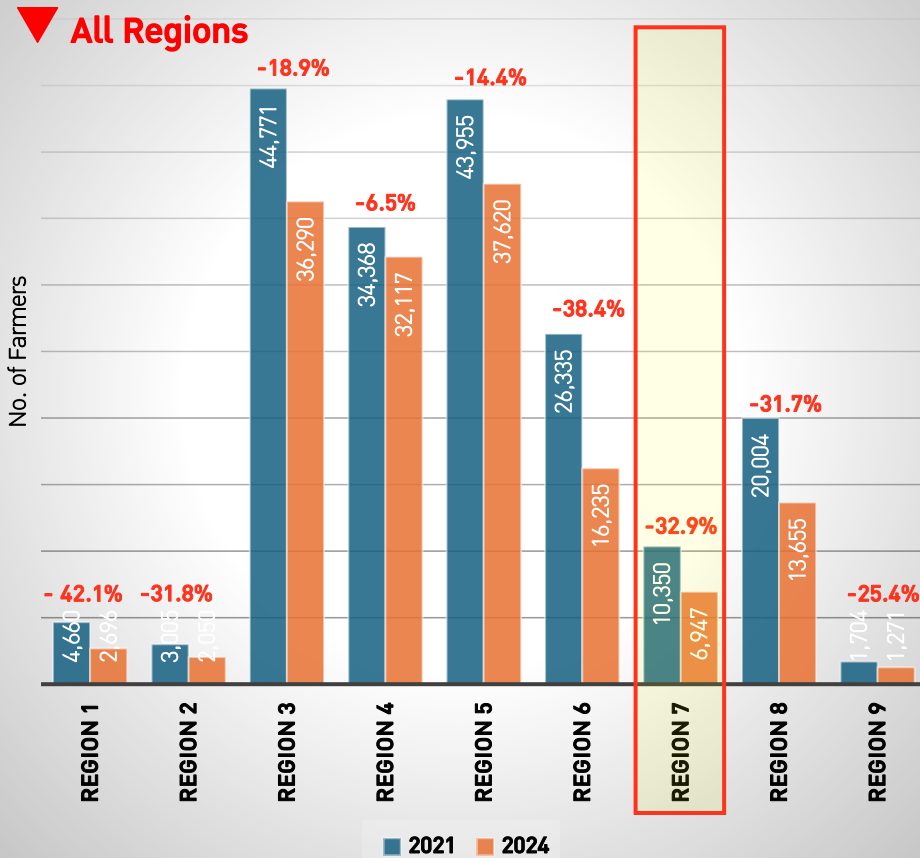


# No. of farm size change between 2021 and 2024

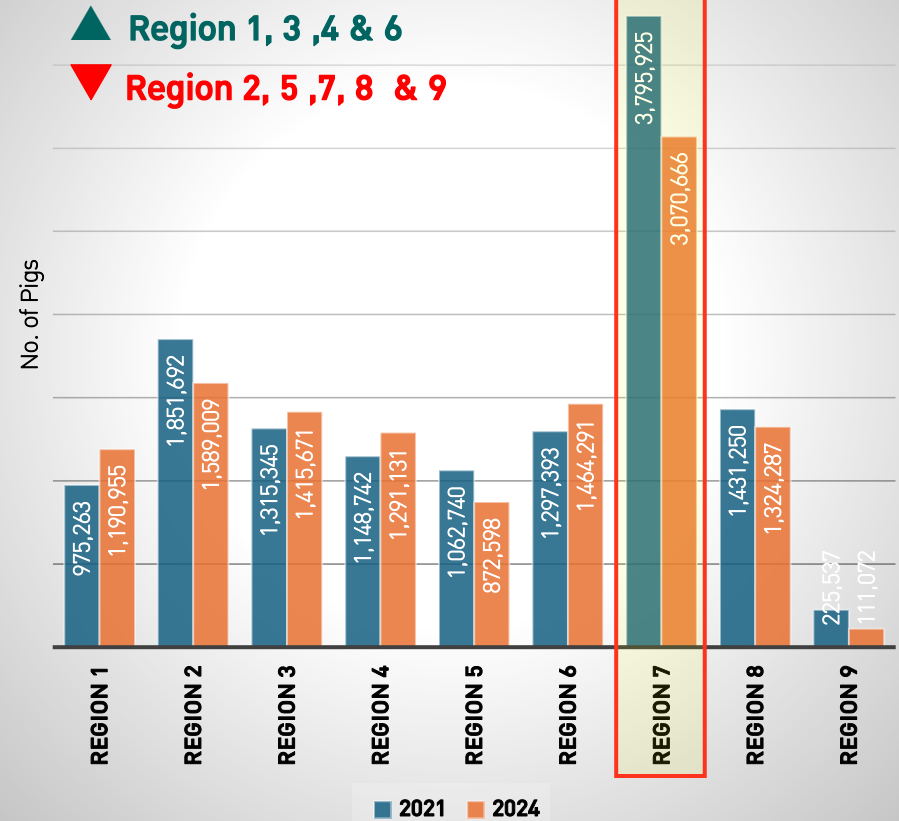
Region	Very small size (1-50 heads)		Small size (51-500 heads)		Medium size (501 – 5000 heads)		Large size (> 5,001 heads)	
	2021	2024	2021	2024	2021	2024	2021	2024
Region 1	3,708	2,058	571	253	353	325	28	60
Region 2	1,777	1,191	621	371	546	428	61	60
Region 3	42,952	34,483	1,485	1,342	316	439	18	26
Region 4	32,201	29,515	1,738	1,899	422	697	7	6
Region 5	42,500	36,045	1,116	1,257	326	307	13	11
Region 6	23,984	14,391	1,797	1,291	533	515	21	38
Region 7	8,444	5,414	1,086	827	683	582	137	124
Region 8	15,638	9,498	3,721	3,487	640	669	4	1
Region 9	1,323	985	342	244	37	40	2	2
<b>Total</b>	<b>172,527</b>	<b>133,580</b>	<b>12,477</b>	<b>10,971</b>	<b>3,856</b>	<b>4,002</b>	<b>291</b>	<b>328</b>

# Majority pork supply still come from Region 7.

### No. of Farmers



### No. of Pigs



# Fattening pig production cost structure increases

Cost Structure (US\$)	2007 <sup>a</sup>	2017 <sup>a</sup>	2021 <sup>b</sup>	2024 <sup>c</sup>	Percentage
1. Variable costs	124.9	183.2	234.0	207.5	91.5%
• Labor costs	2.1	3.4	4.1	23.2	10.2%
• Piglet cost	33.1	72.3	101.3	61.8	27.2%
• Feed cost	82.9	93.8	109.6	111.2	49.0%
• Veterinary medicine and supply	1.7	4.8	9.1	4.3	1.9%
• Other operating costs	5.2	8.9	9.9	7.1	3.1%
2. Fixed costs	1.8	3.2	3.2	19.3	8.5%
3. Total cost per head	126.7	186.3	237.2	226.7	100.0%
4. Cost per kg.	1.3	1.9	2.4	2.3	

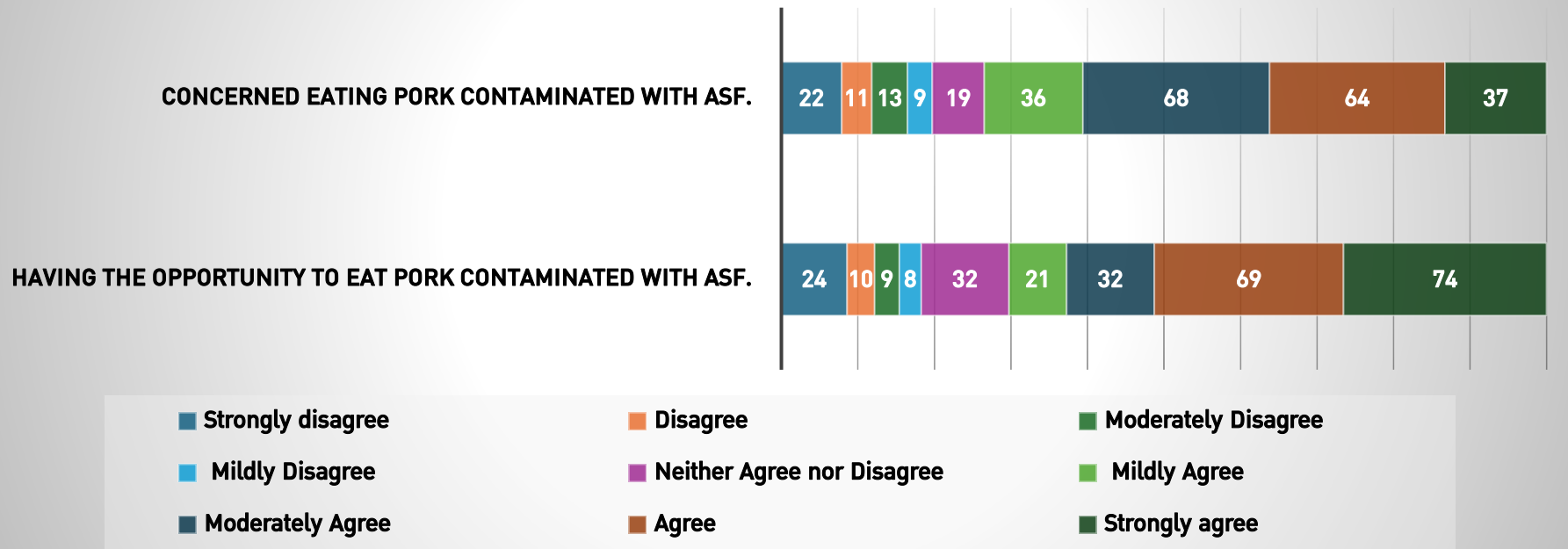
**76.2% of  
Total cost**

Source: <sup>a</sup> Premashthira, Photchanaprasert, & Ratanavanichrojn (2020), <sup>b</sup> OAE, Thailand (2022), <sup>c</sup> Sayruamyat (2024)

# Let's focus on CONSUMER PERCEPTION

# Thai Consumer have high risk perception of consuming pork contaminated with ASF

## Consumer perception



Source: Khotchahan (2023)

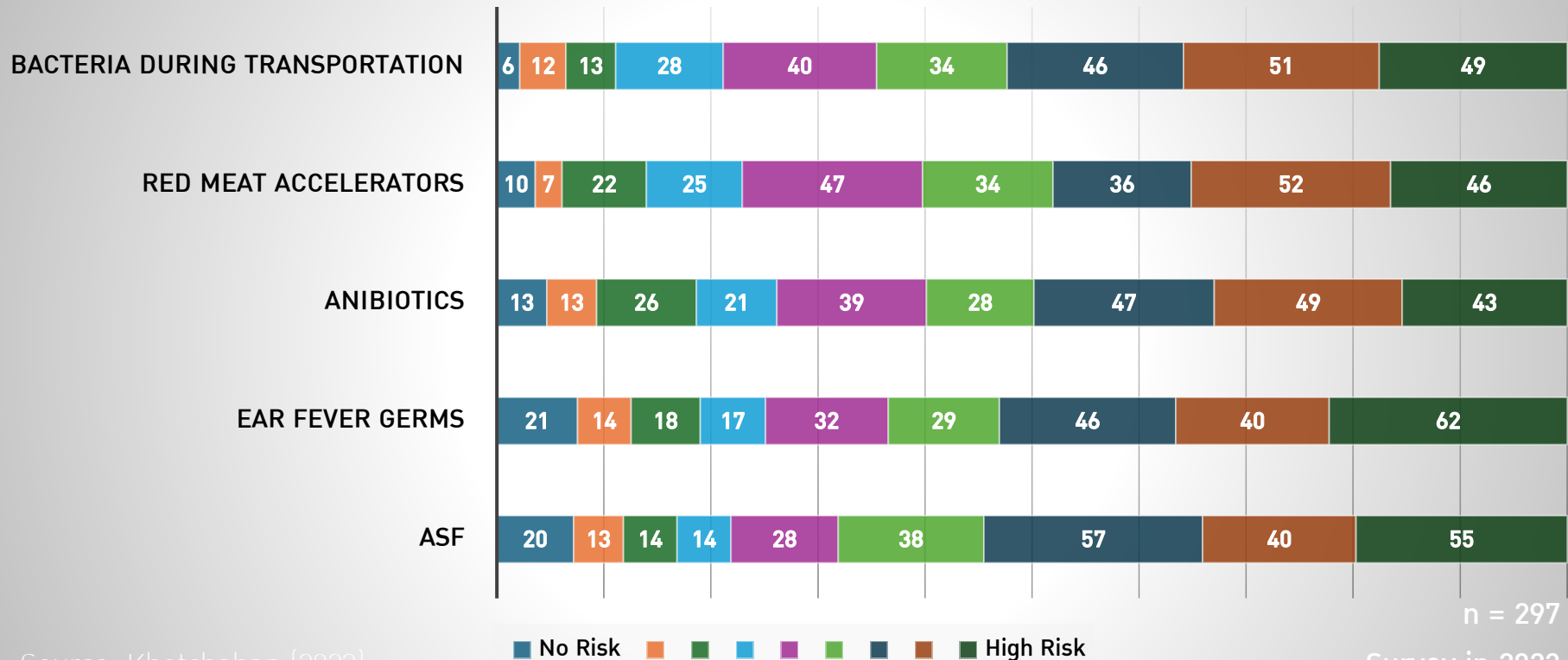
n = 297  
Survey in 2023

# Consumer risk perception

For me, there is a risk of eating fresh pork contaminated with ...

No risks

High risks



Source: Khotchahan (2023)



# Big challenges for Thai swine industry

## Supply

1. The cost of producing Thai pigs is still high, both in terms of farm management costs, biosecurity costs, and feed costs.
2. The enormous cost of new investments was a major barrier to industry entry, resulting in future food insecurity for the nation regarding meat.
3. Facilitating the recovery of small and medium-sized farms
4. Pressure from the Free Trade Agreement to import pork.

## Demand

1. The population of Thailand is showing a decline. KResearch (2024) forecasts that Thai pork consumption will increase at an average rate of 0.6% annually over the next five years.
2. Thai population will be super-aged in 2029. The elderly consume 38 kg of pork each year, less than working-age adults. The average person eats 49 kg of pork annually.



# Q & A