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U.S. - Thailand Agricultural Trade and Potential Effects of a Free Trade Agreement

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Introduction

The United States has begun negotiating a free trade agreement with Thailand. Such an agreement could have mixed effects on U.S. agriculture. Thailand is a major sugar and rice exporter and an importer of wheat, soybeans, and cotton. Under a possible U.S. - Thailand Free Trade Agreement (FTA), Thailand may seek to increase exports of sugar to the United States. The United States, on the other hand, could benefit from the elimination of high tariffs Thailand has in place for processed foods and meats. The objective of this study is to analyze U.S. - Thailand agricultural trade and to estimate how trade patterns could change under an FTA. An in-depth empirical analysis is not yet possible since the details of the agreement are yet to be negotiated. This paper simply provides an overview of the issues and a general analysis of U.S. - Thailand agricultural trade. The beginning sections of this paper discuss general characteristics of the two countries, historical agricultural trade data, and the major trade barriers that exist. The subsequent sections analyze U.S. - Thailand agricultural trade and the potential effects of the FTA for specific commodities. Much of the information in this report is obtained from various Global Agriculture Information Network (GAIN) reports from the U.S. Department of Agriculture's Foreign Agricultural Service (FAS), a report from the U.S. Trade Representative (USTR), and data from FAS, the U.S. International Trade Commission, and the International Grains Council.

General Characteristics

Thailand is a country in Southeast Asia with a population of 64 million and per capita GDP of \$2,230 in 2003 (Table 1). In comparison, the United States has a population of 290 million and per capita GDP of \$37,756. Agriculture accounts for about 11 percent of total GDP in Thailand, compared to 2 percent in the United States. The United States has considerably more agricultural land than Thailand. Thailand has 15 million hectares of arable land, compared to 175 million hectares in the United States; per capita arable land equals 0.23 hectares in Thailand and 0.60 hectares in the United States.

Thailand has been a member of the Association of Southeast Asian Nations (ASEAN) Free Trade Area, (AFTA), since 1991. In addition to negotiating with the United States, Thailand is in the process of creating free trade agreements with China, Australia, Japan, South Korea, and India.

U.S. - Thailand Agricultural Trade

U.S. agricultural trade with Thailand fell during the Asian financial crisis of the late 1990s, but has increased in recent years (Figure 1). Agricultural imports from Thailand increased from \$690 million in 1999 to \$924 million in 2003, while U.S. exports to the country increased from \$409 million to \$675 million during that same time period. The United States has maintained an agricultural trade deficit with Thailand that has ranged from \$123 million to \$337 million over the last 10 years.

Table 1. General Characteristics of the United States and Thailand

		United States	Thailand
Population	(million people)	290.3	64.2
Per Capita GDP	(U.S. dollars)	37756	2230
% GDP from Agriculture	(%)	2	11
Total Land	(1000 hectares)	915,896	51,089
Agricultural Land	(1000 hectares)	411,259	19,100
Arable Land	(1000 hectares)	175,209	15,000
Per Capita Arable Land	(hectares)	0.60	0.23

Sources: U.S. Census Bureau, International Monetary Fund, and the Food and Agriculture Organization of the United Nations

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Rice is the leading agricultural import from Thailand (Table 2). Other agricultural imports from Thailand include pineapples, pineapple juice, tobacco, and feeds and fodders. Soybeans, wheat, and cotton are the major U.S. agricultural exports to Thailand (Table 3).

Major Trade Barriers

The 2004 National Trade Estimates Report on Foreign Trade Barriers from the Office of the U.S. Trade Representative (USTR) notes that high duties on agriculture and food products are major impediments to U.S. exports of high value food products to Thailand. Tariffs on consumer-ready foods range from 30 to 50 percent, and tariffs are also high for meats, fresh fruits, vegetables, cheese, and pulses. The USTR reports that U.S. wine faces a total tax of nearly 400 percent. The average tariff rate on agriculture and processed food products is 24.4 percent. On the other hand, Thailand has liberalized trade for soybeans, cotton, and wheat. The country has eliminated tariffs for soybeans and cotton and has cut tariffs for wheat and soybean meal. The USTR report indicates that sanitary and phytosanitary standards provide a barrier for certain agricultural products since they often appear to be applied arbitrarily and without prior notification.

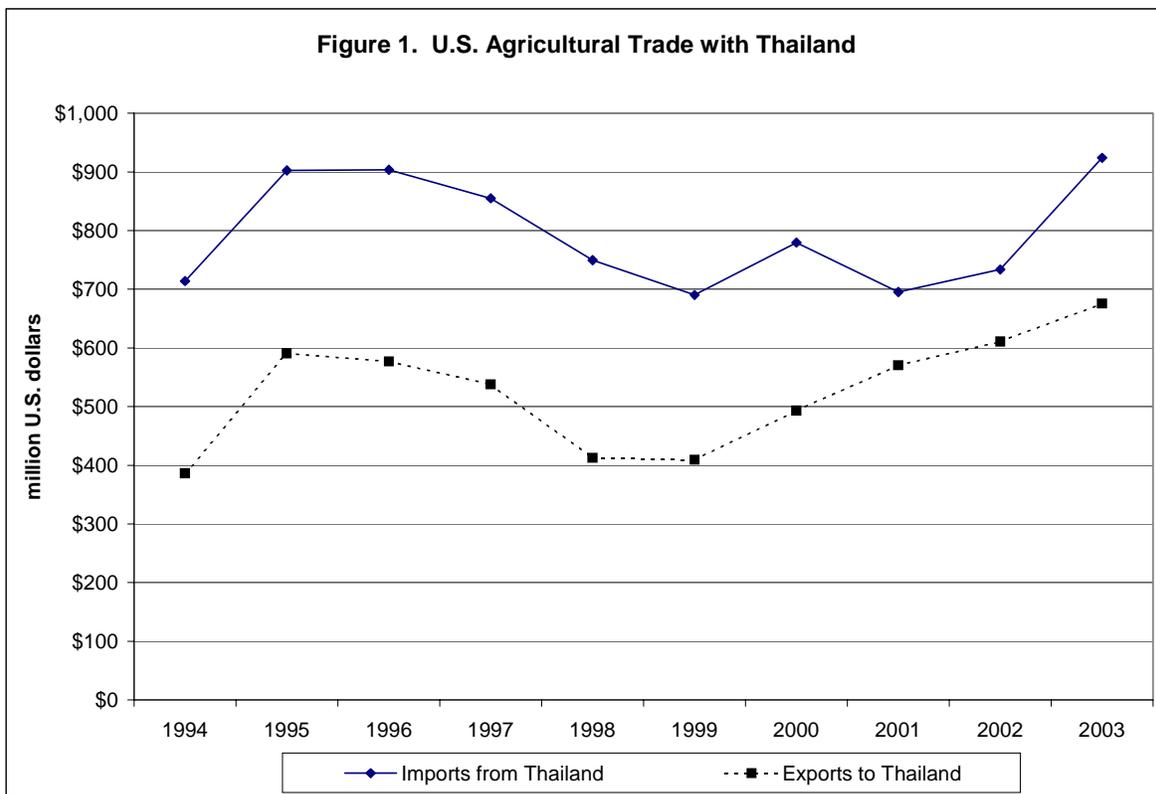


Table 2. U.S. Agricultural Imports from Thailand (thousand dollars)

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Total	713,983	902,462	903,578	854,813	749,472	690,205	779,278	695,073	733,480	923,833
Rice	93,741	89,565	108,597	146,379	126,103	117,015	121,061	106,219	94,883	132,242
Pineapples - Can or Prep	78,932	53,430	54,794	51,380	36,378	81,682	46,796	44,450	54,462	69,985
Feeds/Fodders, Ex Oilcake	19,705	19,279	22,455	22,545	26,332	20,106	24,988	22,404	25,780	33,774
Tobacco - Unmanufactured	35,103	2,411	49,607	35,413	20,947	20,538	17,771	23,795	11,335	30,832
Pineapple Juice	22,599	28,417	41,964	31,396	24,676	35,892	16,451	21,392	21,000	22,823
Confectionery Products	1,276	3,231	1,129	1,228	2,364	8,090	22,488	20,488	17,874	21,559
Beverages, Ex Fruit Juice	9,272	9,621	11,362	10,411	10,825	11,811	12,980	15,075	22,347	26,972
Starches, Ex Wheat & Corn	13,197	20,974	21,499	14,915	16,276	14,848	13,850	12,780	13,529	17,204
Soups & Sauces	5,798	6,652	6,985	6,767	6,432	8,139	8,519	8,895	9,635	10,867
Pasta & Noodles	9,087	8,949	10,528	11,430	9,456	10,386	11,094	9,373	10,603	9,856
Cococut Meat	3,935	3,341	5,372	7,525	7,744	8,307	7,610	9,107	6,892	6,270
Nursery Stock, Bulbs, Etc.	2,789	3,398	1,619	1,788	1,359	1,795	2,871	5,399	4,673	6,063
Sugar	6,237	7,990	13,219	12,188	8,854	6,312	6,229	5,376	2	5,853
Pineapples, Fresh or Frozen	4,217	2,967	5,238	4,557	4,783	3,356	3,887	4,572	3,897	5,298
Seeds - Field & Garden	4,756	5,973	7,993	8,785	7,395	11,967	10,680	5,725	5,226	4,835

Source: FAS/USDA

Table 3. U.S. Agricultural Exports to Thailand (thousand dollars)

	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Total	386,156	590,417	576,797	537,541	412,744	409,005	492,998	570,019	610,646	675,467
Soybeans	12,808	52,994	125,751	114,981	92,201	136,268	145,185	114,005	113,879	181,308
Cotton, Ex Linters	112,793	178,448	86,189	79,740	65,385	28,174	67,254	102,514	122,516	143,892
Feeds & Fodders	26,514	42,460	51,246	32,854	16,681	25,090	42,821	41,849	52,748	55,435
Wheat	50,947	75,239	43,099	45,864	38,649	40,650	42,967	56,288	62,537	54,217
Bovine Hides	17,771	38,893	23,473	21,353	17,576	15,112	24,409	51,095	43,646	45,803
Essential Oils	2,832	3,121	5,080	5,160	4,444	3,691	9,079	13,482	15,874	20,952
Soybean Meal	8,429	9,740	40,336	40,045	46,768	42,124	32,022	43,946	39,063	13,377
Tobacco - Unmanufactured	65,749	66,004	52,139	75,260	49,471	23,033	22,570	22,748	21,998	11,591
Dairy Products	13,936	2,529	6,734	18,417	10,659	13,438	14,370	13,722	20,684	11,342
Corn By-Products	19,290	29,468	34,369	17,996	6,591	6,738	12,871	14,403	9,504	9,406
Protein Substances	5,733	7,461	11,013	11,008	8,687	7,585	6,295	6,310	11,451	9,292
Poultry, Live	4,218	4,350	3,368	4,182	4,538	3,816	3,273	4,070	7,058	7,366
Tobacco, Light Air	32,107	35,589	30,450	35,499	31,420	12,567	12,120	12,581	13,206	6,726

Source: FAS/USDA

The U.S. Department of Agriculture's Foreign Agricultural Service (FAS) (March 16, 2004) estimates that import duties are 51 percent for red meats and poultry meats, 5-30 percent for dairy products, 60 percent for seafood, 10 percent for nuts, 5-30 percent for snack foods, 33 percent for frozen potatoes, 30-60 percent for processed meat products, 30 percent for processed fruit and vegetables, almost 400 percent for wine, 9.2 percent for pet foods, and \$25/ton for wheat. The wheat tariff is being reduced for 2004 and 2005. These tariffs, along with other import restrictions such as import permit fees for meats, negatively impact U.S. agricultural exports.

The United States has lower tariffs than Thailand for agricultural products. The United States has a normal trade relations (NTR) duty rate of 1.4 cents/kg for most imported rice, which is less than 5 percent. The U.S. NTR duty rate for pineapples is 0.44 to 1.1 cents/kg, which is also less than 5 percent (U.S. International Trade Commission 2004). The United States restricts sugar imports through use of quotas.

Rice

The United States is a major rice exporter, but it also imports rice from Thailand. Thailand exported 295 thousand metric tons of rice to the United States in 2003, and about 70% of U.S. rice imports in recent years have been from Thailand (Table 4). Thailand is the world's largest rice exporter, totaling 7.5 million metric tons in 2002/03 (Table 5). U.S. tariffs for rice are low, so the agreement would likely have a small impact on rice trade.

Table 4. U.S. Rice Imports

Source	1999	2000	2001	2002	2003
	-----1,000 metric tons-----				
Thailand	239.2	238.9	290.3	277.0	294.9
China	37.1	1.0	0.7	0.5	66.2
India	36.6	44.3	46.9	52.3	49.9
Pakistan	8.9	12.2	10.3	11.0	12.3
Italy	4.4	4.1	3.8	4.1	4.3
Australia	11.0	0.0	49.6	61.3	0.0
Others	16.6	3.7	4.2	3.9	3.8

Source: FAS/USDA

Sugar

Thailand is a major sugar producer and exporter, but the country currently exports only small quantities to the United States. U.S. sugar imports from Thailand have totaled just 14 thousand metric tons in recent years (Table 6); the U.S. quota system restricts the level of these imports. Total sugar exports by Thailand in 2002/03 equaled 5.1 million metric tons, making the country the 3rd largest sugar exporter, behind Brazil and the EU (Table 7). The largest markets for Thailand's sugar exports include Indonesia, Russia, Japan, and Malaysia. FAS (April 7, 2004) indicates that while sugar production in Thailand was high in 2002, production is slowly declining as the government is decreasing financial assistance to cane growers.

Table 5. World Milled Rice Exports

Exporter	1998/1999	1999/2000	2000/2001	2001/2002	2002/2003
	-----1,000 metric tons-----				
Thailand	6,679	6,549	7,521	7,245	7,552
India	3,350	1,400	1,685	6,300	5,440
United States	2,730	2,804	2,590	2,954	3,859
Vietnam	4,555	3,370	3,528	3,245	3,795
China	2,708	2,951	1,847	1,963	2,583
Pakistan	1,837	2,104	2,429	1,628	1,992
Uruguay	745	685	736	475	615
Korea, South	0	0	0	126	574
Egypt	320	500	705	473	550
Burma	57	159	670	1,002	388
Others	2,776	2,452	2,456	1,487	1,355

Source: PS&D Database, FAS/USDA

Depending on the outcome of the agreement, sugar trade could be significantly affected. Thailand has a large exportable surplus and could export much greater quantities to the United States. Koo et al. (2003) estimated the impact that additional sugar imports would have on the U.S. sugar industry. They calculate that with 500 thousand tons of additional imports, the Red River Valley would continue to produce sugar at historical levels, but the price of sugar beets would be much lower, near the break-even price. The recently negotiated Central American Free Trade Agreement (CAFTA), if passed by Congress, will initially allow 108 thousand additional tons of sugar imports, but the U.S. - Australia FTA does not allow for any additional imports.

Soybeans

Soybeans are the leading agricultural commodity exported by the United States to Thailand, equaling \$181 million in 2003. In terms of quantity, U.S. soybean exports to Thailand totaled 720 thousand metric tons in 2003 and averaged 670 thousand metric tons per year from 1999 to 2003 (Table 8). Thailand ranked as the ninth-largest destination for U.S. soybean exports in 2003.

Thailand had a tariff-rate quota (TRQ) system to restrict soybean imports and protect the domestic soybean industry. However, the country does not have a good climate for growing soybeans, and its large poultry industry, which is a major consumer of soybean meal, was negatively impacted by the TRQ. In 1996, Thailand liberalized imports of soybeans and soybean meal by eliminating the quotas. The import tariff for soybeans was also eliminated, while the tariff for soybean meal was cut (FAS 1997). Thailand's soybean imports increased significantly at this time and continue to rise (Table 9). Thailand reviews its import policy annually and could change it, but the country generally decides to operate without a tariff or quota for soybeans. One restriction on trade is that eligible importers are required to purchase domestic soybeans at determined prices. Thailand added a new condition in 2004 that eligible soybean importers cooperate with the government in buying soybeans from the neighboring most-favored-nation (MFN) countries (i.e., Laos, Burma and Cambodia) (FAS, November 11, 2003).

About half of Thailand's domestic soybean imports are from the United States. Demand for soybean meal in Thailand is growing because of growth of the poultry industry, but demand for imports may not increase since domestic soybean meal production is also growing. The U.S. market share of Thailand's soybean meal imports is about 12 percent. The FAS projects that the anticipated growing demand coupled with a downward trend in domestic production should lead to higher import demand for soybeans over the next few years. The United States faces competition in Thailand from Argentina and Brazil (FAS, May 29, 2003).

While soybean trade with Thailand is already liberalized, the United States still could benefit from an FTA because it could formalize the zero tariffs and quotas and eliminate any uncertainty about a changing import policy. If the FTA has a positive effect on the overall Thai economy, demand for poultry could rise, which would have a positive impact on Thailand's poultry industry and would create a greater demand for soybeans in the country.

Table 6. U.S. Sugar Imports

Source	1999	2000	2001	2002	2003
-----metric tons-----					
Guatemala	351,689	151,490	85,779	92,006	238,687
Dominican Republic	143,333	199,981	151,366	170,439	178,656
Brazil	179,127	152,202	230,731	129,189	154,705
Colombia	93,083	68,535	58,774	91,428	153,800
Philippines	141,533	91,663	89,573	76,692	137,761
Australia	76,802	92,158	83,413	90,756	79,197
El Salvador	60,944	60,661	80,197	55,557	77,947
Argentina	21,285	42,579	43,581	65,377	44,006
Peru	21,213	21,857	62,453	41,760	41,023
Costa Rica	74,212	67,920	22,821	15,274	39,574
Panama	57,137	65,835	47,070	37,609	38,334
Belize	13,920	11,201	39,573	46,639	36,301
Mexico	101,027	86,556	126,367	182,896	35,534
Nicaragua	34,778	56,969	4,205	21,366	32,897
Honduras	10,399	5,592	22,185	10,691	25,469
Paraguay	13,357	16,804	16,580	15,397	24,071
South Africa	15,270	46,265	0	62,252	23,645
Canada	21,802	19,761	17,414	22,209	17,321
Swaziland	16,923	32,588	15,951	16,051	16,328
Guyana	12,528	36,374	12,094	12,114	16,160
Thailand	15,253	14,151	14,112	4	14,246
Others	136,729	132,439	132,206	138,341	104,996
Total	1,612,341	1,473,581	1,356,445	1,394,046	1,530,657

Source: FAS/USDA

Table 7. World Sugar Exports

Exporter	1998/1999	1999/2000	2000/2001	2001/2002	2002/2003
	-----1,000 metric tons-----				
Brazil	8,750	11,300	7,700	11,600	14,000
European Union	5,329	6,138	6,607	4,793	5,600
Thailand	3,352	4,147	3,394	4,157	5,100
Australia	4,076	4,123	3,056	3,594	4,220
India	10	25	1,360	1,130	1,950
South Africa	1,355	1,410	1,580	1,235	1,565
Cuba	3,120	3,400	2,980	3,100	1,350
Guatemala	1,086	1,140	1,190	1,310	1,335
Colombia	960	959	965	1,085	1,264
Mauritius	649	426	544	605	577
Others	6,807	6,318	6,048	6,634	6,616

Source: PS&D Database, FAS/USDA

Table 8. U.S. Soybean Exports

Destination	1999	2000	2001	2002	2003
	-----1,000 metric tons-----				
China	1,883	5,231	5,436	4,861	11,112
Mexico	3,287	3,436	3,942	3,920	4,200
Japan	3,678	3,581	3,566	3,750	3,535
Taiwan	1,946	1,932	2,002	2,010	1,591
Indonesia	1,064	839	1,286	1,222	1,274
Spain	1,109	1,164	1,401	1,305	1,246
Germany	793	599	401	1,162	1,123
Korea, S	1,188	1,375	1,180	1,186	1,070
Thailand	720	723	630	556	720
Netherlands	2,087	2,704	2,394	1,398	693
Others	5,388	5,403	6,485	6,303	4,655
Total	23,141	26,986	28,724	27,675	31,219

Source: FAS/USDA

Cotton and Textiles

In 2003, the United States exported 119 thousand metric tons of cotton valued at \$144 million to Thailand. Thailand was the fifth-largest foreign market for U.S. cotton in 2003. Cotton exports to the country decreased in the late 1990s but have increased the last few years.

Thailand relies heavily on cotton imports for its textile industry, and the United States and Australia are the major suppliers. Other cotton exporters to Thailand include China, Syria, and a number of African countries including Mali, Zimbabwe, Cameroon, Benin, Ivory Coast, and Sudan. Thailand has not applied any tariff on imported cotton for several years, and the country does not subsidize cotton production.

The United States is the largest importer of textile products from Thailand, accounting for about half of Thailand's total textile exports. Thailand is concerned that it could lose market share in the United States to low-cost producers in China and India when U.S. quotas for those countries are removed under the WTO. The U.S. tariff rate for various textile products range from 15 to 30 percent. Eliminating these tariffs would likely have a significant positive effect on Thailand's textile exports to the United States, allowing the country to possibly maintain or increase market share in this country (FAS May 14, 2004).

The U.S. - Thailand FTA could have a positive effect on Thailand's textile industry, which would create a greater demand for cotton in the country. The result of the agreement could be an increase in Thai textile exports to the United States and an increase in U.S. cotton exports to Thailand.

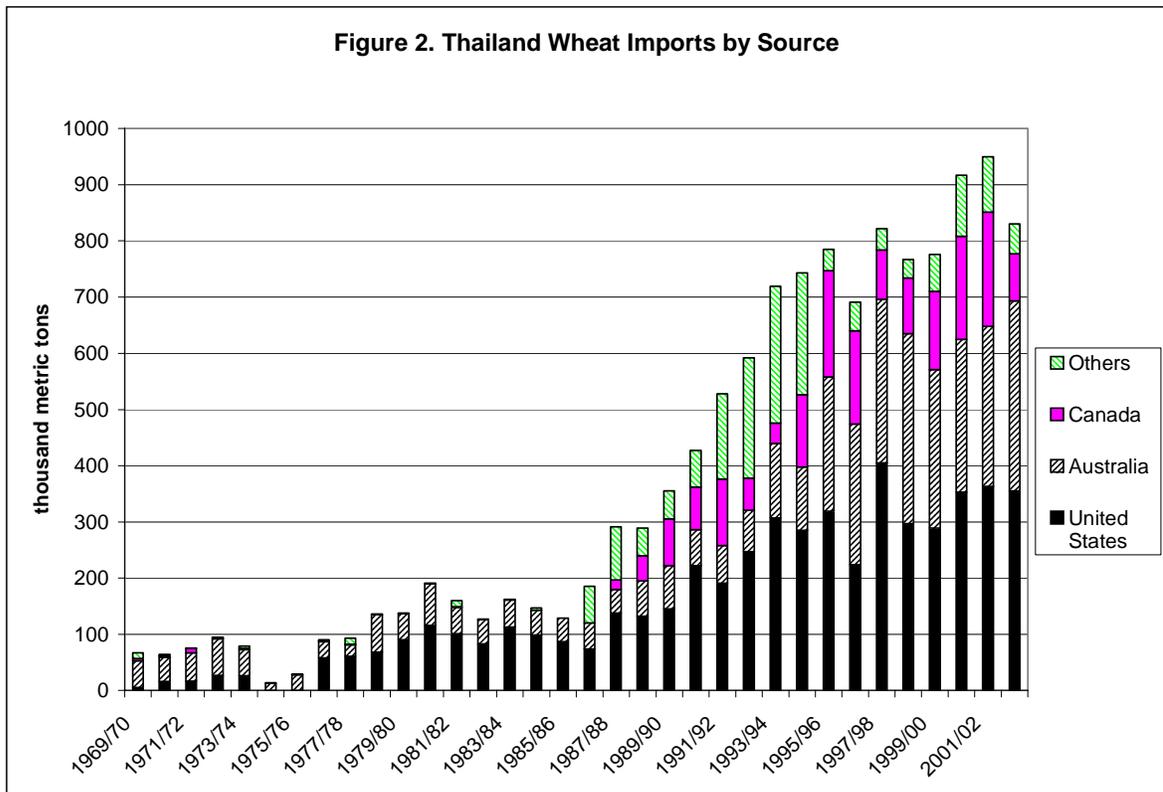
Wheat

The United States exported 331 thousand metric tons of wheat valued at \$54 million to Thailand in 2003. Figure 2 shows Thailand's total wheat imports by source country from 1969/70 to 2003. During the late 1970s and early to mid 1980s, the United States held 60 to 70 percent market share in Thailand, but Thailand imported less than 200 thousand metric tons per year. Thailand's imports began to increase significantly in the late 1980s. U.S. exports to the country increased, but market share fell to around 40 percent. Thai imports from Australia, Canada, and other countries also increased. Australia is the biggest competitor for the United States in Thailand, and Canada has also become a competitor in recent years.

Table 9. Thailand Soybean Imports by Source

	United States	Argentina	Brazil	Total	U.S. Market Share
	-----metric tons-----				
1993	44,684	0	0	44,689	100%
1994	2	0	97,988	97,999	0%
1995	189,950	0	0	189,957	100%
1996	484,720	0	6,250	543,490	89%
1997	548,626	0	294,166	869,398	63%
1998	413,820	154,760	118,250	687,256	60%
1999	645,938	261,306	70,817	1,007,984	64%
2000	777,300	372,789	155,162	1,320,402	59%
2001	571,498	725,172	57,621	1,363,224	42%
2002	774,215	666,810	83,298	1,528,557	51%

Source: Various GAIN Reports, FAS/USDA



Wheat consumption in Thailand has been increasing and is likely to continue in an upward trend as demand for bakery products and noodles increases (FAS March 18, 2004). The decline in imports for 2003 was the result of the Severe Acute Respiratory (SARS), which slowed economic activity. Since wheat production in Thailand is limited, the country must import to meet its growing demand. Thailand reduced its tariff on wheat in October 2003 from 1.0 baht/kg (\$0.70/bu) to 0.10 baht/kg (\$0.07/bu); the tariff on wheat flour was reduced from 40 percent to 25.5 percent, with a further reduction to 5 percent planned for 2005 (FAS March 18, 2004). Most of Thailand's wheat flour imports are from East Asian countries.

The reductions on tariffs that are already taking place could benefit U.S. producers. However, Thailand is also negotiating an FTA with Australia, and so a U.S.-Thailand FTA would negate any advantages that Australia could obtain under its agreement. Thailand is a growing market for wheat and an increase in economic activity that could result from free trade could further increase the demand for wheat in the country.

Corn

Thailand produced about 4.2 million metric tons of corn in 2003. Most of the country's production is consumed domestically, largely as feed corn for poultry. Domestic consumption has been at or slightly above 4 million metric tons in recent years, so the country has been a net exporter of corn. Some corn is exported to East Asian countries, while only minimal quantities are imported. Corn imports are restricted by a TRQ. The total import quota for 2004 is set at 54,700 tons, with an in-quota tariff of 20 percent and an out-of-quota tariff of 73 percent. The United States exported just 2,068 metric tons of corn to Thailand in 2002 and 364 metric tons in 2003. Because of current regulations, exports of corn to Thailand must arrive between March and June, which puts U.S. exporters at a disadvantage to Southern Hemisphere exporters (USTR 2004). Removing these trade restrictions could open up the market and eliminate the advantage for Southern Hemisphere exporters.

Chicken

Thailand is an exporter of chicken meat, and Japan and the EU are the country's main export markets (FAS September 9, 2003). Production in the country is growing. The Thai market is highly protected against imports through use of high tariffs, import permit requirements that are often non-transparent, and an

import permit fee for uncooked chicken. Required import license fees are \$114 per ton for beef and pork and \$227 per ton for poultry (USTR 2004). Demand for chicken meat in the country is growing, and it could become a market for U.S. chicken products under a U.S. - Thailand FTA.

Conclusions

Since a U.S. - Thailand FTA could eliminate the high tariffs that Thailand has in effect for a number of agricultural products, U.S. exporters of fruits, vegetables, and processed and high-value food products could benefit from an agreement. Demand for soybeans and wheat is growing in Thailand and could increase further if a free trade agreement has a positive effect on economic activity in the country. Since Thailand is also negotiating FTAs with China, Australia, and other countries, a U.S. - Thailand FTA could negate some advantages that exporters from these countries could obtain. For example, Thailand's trade agreement with China could have a negative impact on U.S. fruit and nut exports to Thailand. The impact on U.S. imports would not likely be as great because the United States generally has lower tariffs on agricultural products. However, one industry that could be negatively affected is sugar. Thailand is a major producer and exporter of sugar but exports only minimal quantities to the United States because of the U.S. quota system. The effect of the agreement on the sugar industry would depend on the outcome of the negotiations.

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