USDA United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** October 20, 2026

Report Number: TH2026-0040

Report Name: Snapshot of Late-September Floods Impact on Agriculture

Country: Thailand

Post: Bangkok

Report Category: Agricultural Situation

Prepared By: FAS Bangkok

Approved By: Victorino Floro

Report Highlights:

Late-September floods across 26 Thai provinces hit marketing year (MY) 2026/27 main-crop rice just as harvest began. Satellite imagery showed floodwaters receding in the Central Plains between October 4 and 7 but lingering in the East, where rice fields remained under water on October 7. Flooding left more than 3.9 million livestock dead or missing, mostly poultry, and damaged 5,000 fish and shrimp farms in 24 provinces. The government asked exporters to reduce fresh egg shipments to protect domestic supply. The Ministry of Commerce expects the floods to add about 0.1 percentage points to inflation.

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Floods Situation

Thailand averages about 1,600 millimeters (mm) of rain a year, or roughly 4.4 mm a day. Most of it falls during the May–October rainy season, when daily averages reach 7–10 mm. The South and East receive much more rain than the North and Northeast.

In late September, Thai Meteorological Department (TMD) data showed more than 30 hours of continuous rain pushing rainfall totals to four times the seasonal average and flooding in 26 provinces. According to the TMD, a monsoon trough over the lower Central and Eastern regions combined with a strong low-pressure system on September 25–26 to produce the rain. Rain covered more than 80 percent of the Central and Eastern regions and Bangkok early in the week of September 25–October 1. Most of the highest one-day totals fell on September 25 (Table 1).

Table 1. Thailand: Highest One-Day Rainfall by Region, September 25–October 1, 2026

Region	Station (province)	Rainfall (mm)	Date
East	Chachoengsao	293.7	Sep 25
Bangkok and vicinity	Bueng Kum (Bangkok)	230.5	Sep 25
Central	Chai Nat	197.0	Sep 25
Northeast	Loei	120.0	Sep 25
North	Kamphaeng Phet	110.5	Sep 25
South (west coast)	Trang	110.0	Sep 30
South (east coast)	Phetchaburi	86.0	Sep 25

Source: The Thai Meteorological Department

Heavy rain continued after the low-pressure system moved toward the Gulf of Martaban. On September 28, TMD issued warnings Nos. 5–18 forecasting heavy to very heavy rain over the western and lower North, the western Central region, and the East. A moderately strong southwest monsoon over the Andaman Sea and the Gulf of Thailand kept rain falling elsewhere. TMD warned of flooding and flash floods in foothills and low-lying areas. Waves reached 2–3 meters in the upper Gulf and upper Andaman, and TMD advised small boats there to stay ashore (TMD warning).

Basin Conditions as of October 7

On October 7, the Ministry of Agriculture and Cooperatives (MOAC) and the Royal Irrigation Department (RID) reviewed conditions in each basin:

- **Chao Phraya:** Conditions were easing and flows at Nakhon Sawan continued to fall. RID had cut releases from the Chao Phraya Dam from 2,500 to 2,400 cubic meters per second (m^3/s) to relieve downstream areas and drain standing water.
- **Pasak:** The Pasak Chonlasit Dam held 927 million m^3 (106 percent of capacity) and was releasing 500 m^3/s.
- **Bang Pakong:** This basin remained the top concern. In Prachin Buri and Chachoengsao, flash floods, overflowing riverbanks, and high tides continued to slow drainage to the sea. RID expected tides to recede after October 13 and conditions to improve by late October if no further heavy rain fell.
- **Mae Klong:** Rising flows on the Khwae Noi and Khwae Yai rivers could force the Mae Klong Dam to release more than 1,200 m^3/s. RID warned riverside communities in Kanchanaburi, Ratchaburi, Samut Songkhram, and Samut Sakhon.
- **Bangkok and vicinity:** The flood crest from the Chao Phraya Dam had passed, and river levels remained below banks and floodwalls. Heavy local rain posed the main remaining risk to the city's drainage system.

- **South:** RID had positioned pumps and water-pushing machines ahead of heavy rain expected on October 10–11. In Phetchaburi, the Kaeng Krachan Dam held 727 million m³ (102 percent of capacity), and RID planned controlled releases.

Satellite Updates

The Geo-Informatics and Space Technology Development Agency (GISTDA) analyzed radar imagery from October 4 (Radarsat-2) and October 7 (COSMO-SkyMed-2). Both showed floodwaters receding across the Central Plains, with the slowest drainage in the Bang Pakong basin in the East. The two images covered different areas, so their totals were not directly comparable:

- **October 4:** 29 provinces; 659,934 hectares (ha) flooded
- **October 7:** 21 provinces; 284,714 ha flooded

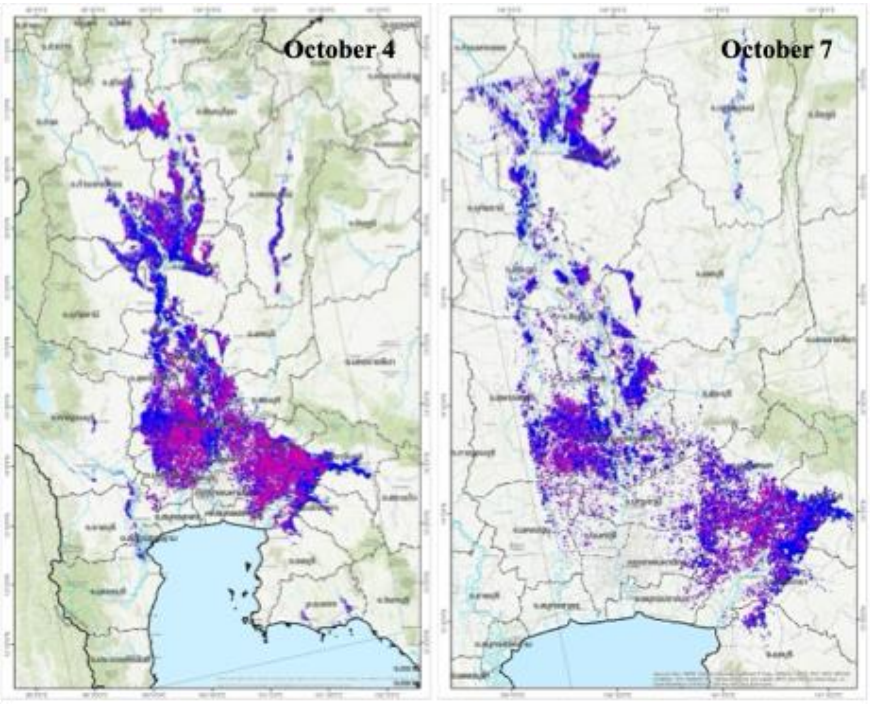
Note: To avoid overstating the change, Post compared only the subdistricts that both images covered. That shared area contained more than 99 percent of the flooding detected on October 7 and about 81 percent of the flooding detected on October 4.

Table 2. Thailand: GISTDA Flood Estimates by Satellite Pass, October 4 and 7, 2026

Indicator	Oct 4 Radarsat-2	Oct 7 COSMO-SkyMed-2
Area covered	Central Plains, East, lower North (29 provinces)	Central Plains and East (21 provinces)
Flooded area (ha)	659,934	284,714
Rice area flooded (ha)	111,202	137,073
People affected	1,256,683	491,407
Houses damaged (household)	13,761	1,897
Roads affected (km)	5,062	1,051

Source: The Geo-Informatics and Space Technology Development Agency (preliminary, not field-verified). Hectares converted from rai by Post.

Figure 1. Thailand: Flood / Inundated Areas from Satellite Imagery, October 4 (left) and October 7 (right), 2026.

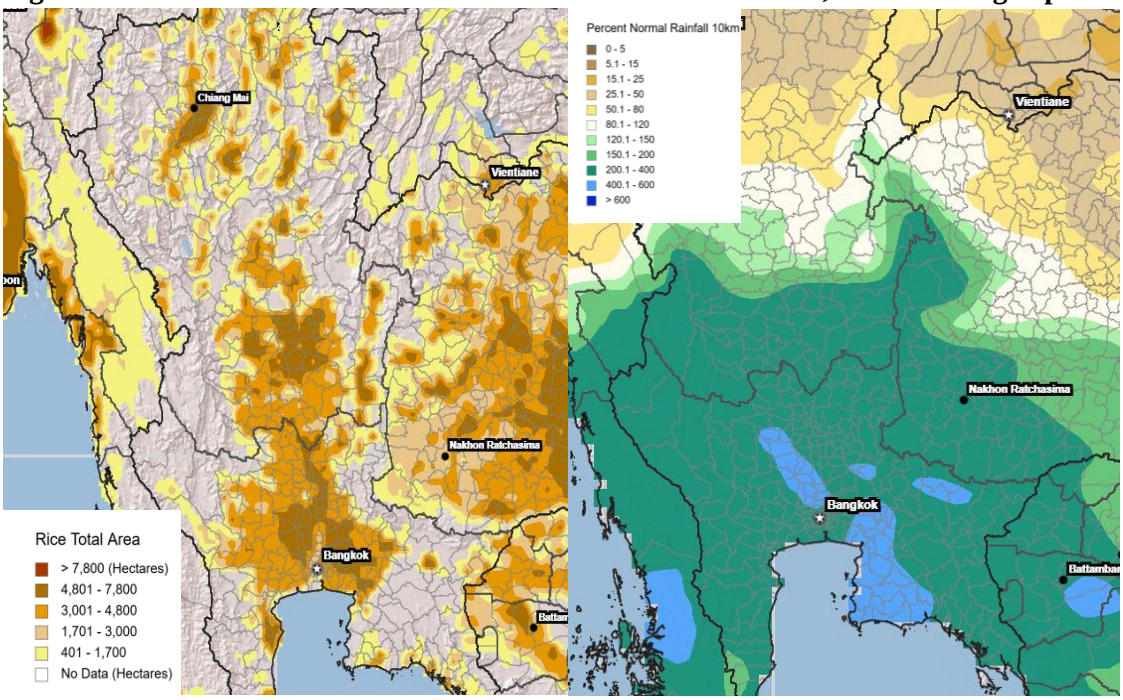


Source: Thai Geo-Informatics and Space Technology Development Agency (GISTDA) (preliminary, not field-verified).

The floods hit MY 2026/27 main-crop rice just as harvest began. GISTDA's October 7 imagery showed 137,073 ha of rice under water. Flooded rice area increased between the two passes even as the total flooded area fell due to slow drainage in certain rice areas.

USDA Global Agricultural and Disaster Assessment System (GADAS) data show that for the week ending September 28, 2026, most of Central Thailand and parts of the Northeast received 200–400 percent of normal rainfall, and some areas received 400–600 percent. These areas include Thailand's major rice-producing regions (Figure 2).

Figure 2. Thailand: Rice Total Area and Percent Normal Rainfall, Week Ending September 28, 2026



Sources: USDA - FAS GADAS, U.S. Air Force 557th Weather Wing (10 km) and WorldClim weather normals via USDA/FAS CADRE database

Two factors will limit the effect on national rice supply:

1. **The main rice-growing region received heavy rain limited flooding.** The Northeast grows about 61 percent of Thailand's main-crop rice but saw far less flooding than the Central region, which grows 14 percent. GISTDA's October 4 imagery showed only about 2,800 ha of rice under water in the Northeast.
2. **Losses are likely to be partial.** Floodwaters in most areas are expected to recede quickly, and water depth varied widely, so not all submerged fields would be lost.

Livestock and Poultry

According to government reports, the floods caused heavy livestock losses, mostly of poultry, with more than 3.9 million livestock dead or missing between late-August flash floods and October 2. About 15,000 livestock farmers, with more than 12.5 million animals, were affected. Floodwater also covered about 274 hectares (1,715 rai) of pastureland.

Major processors did not report shortages of chicken or pork, and retail prices did not rise significantly. Industry contacts said integrated producers kept operating because their farms and plants sat close together in production clusters, such as in Lop Buri. One company moved animals out of some of its pig farms and reported no losses. Post contacts believed most of the reported poultry deaths occurred on small farms.

Distribution, rather than production, was the main concern. Processors struggled to deliver products to markets, especially where local production had fallen, and some products could not leave flooded farms. Companies said they had enough supply to restock shelves despite panic buying. However, they could not reach convenience stores in low-lying areas, where only the military and charitable foundations could get through. The Ministry of Interior and the Ministry of Commerce offered logistics support for the hardest-hit areas, but Post's contacts had not yet worked with either ministry. At least one major agribusiness enterprise worked with the Ministry of

Culture and the Ministry of Social Development and Human Security to donate chicken and eggs to affected areas.

Eggs

Floodwaters killed 3.25 million laying hens in Chachoengsao, Chon Buri, Nakhon Nayok, and Prachin Buri, according to the Department of Internal Trade (DIT). Chachoengsao alone lost 3 million birds. The Department of Livestock Development (DLD) estimated the losses took 2.2–2.5 million eggs a day off the market.

Two other factors tightened supply. Flooding disrupted egg transport and distribution, and demand jumped as consumers stocked up on eggs, which keep for weeks and are a staple in many Thai dishes. Price effects varied by location. Prices in Phitsanulok stayed relatively stable, while prices in Chon Buri reportedly rose by $0.18–$0.30[1] (6–10 baht) per tray.

DLD has adopted three measures to restore supply:

1. **Keep commercial layers in production longer.** Farms would retire commercial layers at 85 weeks instead of 80. DLD expects this to keep about 4.4 million additional hens laying and add roughly 3 million eggs a day.
2. **Keep parent stock longer.** For 12 months, farms would retire parent-stock layers at 75 weeks instead of 72. DLD expects this to add about 1.89 million layer chicks a year.
3. **Reduce fresh egg exports.** From October through December 2026, exporters would cut shipments from 800,000–900,000 eggs a day to 600,000–700,000. Separately, on October 6, the Ministry of Commerce asked exporters to cut volumes by 30–50 percent through December 2026 or delay shipments by two to three weeks.

DIT also asked the egg producers' association and large farms to hold the farm-gate price at $0.12 (4 baht) per egg.

The export cuts mainly affected Singapore. Thailand exported $51.4 million (1.7 billion baht) worth of eggs in 2025. Singapore took 79 percent of that value and Hong Kong about 9 percent.

Aquaculture

Early reports indicate flood damage to fish and shrimp farms topping $5.1 million (170 million baht). As of October 2, about 5,000 aquaculture farmers in 24 provinces were affected. The East, which produced about 20 percent of Thailand's shrimp, was hit hardest. Post saw no clear sign of widespread shortages or significant consumer price increases.

Food Prices and Inflation

The Ministry of Commerce's Trade Policy and Strategy Office (TPSO) expects the floods to add about 0.1 percentage points to inflation. Unlike the 2011 floods, these floods did not push up fresh food prices broadly. The effect fell mainly on fresh vegetables. Prices for fruit, meat, poultry, and fish held steady or fell.

Fuel, not flooding, drove inflation. Headline inflation reached 2.82 percent year-on-year in September 2026, the sixth straight monthly increase. Fuel prices, pushed up by the Middle East crisis, contributed 1.85 percentage points, and prepared food contributed 0.65 points. Food and non-alcoholic beverage prices rose 3.07 percent, led by rice, flour products, meat, eggs, fresh vegetables, and fruit.

[1] Exchange rate $1=33.05 (September 2026) Source: Bank of Thailand

TPSO expects inflation to stay positive in October:

- **Upward pressure**: Diesel reached $1.28 (42.19 baht) per liter on October 2, up 34.58 percent from a year earlier, and is expected to add about 1.09 points to October inflation. El Niño effects on rice, meat, eggs, vegetables, and fruit, plus higher demand for vegetables and tofu during the Vegetarian Festival, are expected to add further pressure.
- **Partial offset**: The electricity tariff for September–December dropped to $0.117 (3.86 baht) per kilowatt-hour, down from $0.120 (3.95 baht).

Government Response and Outlook

Minister of Agriculture and Cooperatives Suriya Juangroongruangkit directed Secretary to the Minister Sorawut Nuangjamnong to monitor the situation closely. On October 7, Mr. Sorawut and RID Director-General Wittaya Kaewmee met at RID's Smart Water Operation Center, which connected by video conference to irrigation offices nationwide. Mr. Sorawut instructed agencies to:

- Inspect pumps, water-pushing machines, and heavy equipment, and repair any faulty units immediately;
- Clear water hyacinth, weeds, and debris from sluice gates and other drainage choke points; and
- Coordinate with provincial and local authorities to respond quickly when flooding occurs.

Impact on U.S. Exports and Market Share

U.S. agricultural and related product exports to Thailand totaled $1.5 billion in 2025. Feed and grain products, mainly soybeans, wheat, other feeds and meals, and distillers' dried grains with solubles (DDGS), accounted for $632 million.

Post contacts expect livestock and aquaculture losses to reduce feed demand, including soybean meals, until farms restock. For most products, U.S. market share will continue to depend mainly on price competition with Brazil, Australia, and ASEAN suppliers. The largest potential share gains are in corn and DDGS, where a domestic shortfall or quality challenges would raise import needs.

Attachments:

No Attachments.