

Thai Smallholder Rubber Project

# Results from assessments of business practices and causes of supply chain fragmentation



## Project background and context

In close collaboration with the Rubber Authority of Thailand (RAOT), the European Forest Institute (EFI) is currently implementing the Thai Smallholder Rubber Project, funded by the European Union (EU). Overall, the project aims to ensure that Thai smallholder rubber producers have improved agricultural and environmental practices, and are able to access the EU market in the context of the EU Deforestation Regulation (EUDR). The project is working with smallholders and collection centres in two pilot sites, with the intention to use the lessons learned to support RAOT to update national approaches and policies. In this manner, the project will have a broader impact on the rubber sector, beyond the immediate project beneficiaries.

The first pilot site is the Phanoi Rubber Cooperative Ltd. ('Phanoi Cooperative'), located in Loei Province in the Northeast of Thailand. Phanoi Cooperative was selected because members produce cup lump rubber and want to register as a Network Rubber Market (NRM). NRM's are part of RAOT's system for verifying deforestation-free and legal production, so providing support to Phanoi Cooperative also provides an opportunity to work with and strengthen this system.

The second pilot site is the Chana Agricultural Cooperative Ltd. ('Chana Cooperative') in Songkhla Province in Southern Thailand. Chana Cooperative was selected because it is already part of the NRM system, and members produce latex and sell to collection points which then sell to the cooperative. Working with this pilot site provides an opportunity to improve management arrangements and strengthen value chain linkages between smallholders, collection points, and the main collection centre, with potential lessons for RAOT's system.



Chana Cooperative central collection centre in Songkhla Province. Somporn Khongtanakrittakorn

## Background to the assessments<sup>1</sup>

One of the objectives of the project is for smallholders in the pilot sites to have an improved understanding of the EUDR information requirements for deforestation-free and legal production and traceability, and ability to comply with them (Outcome 2). In order to determine if this has been achieved at the end of the project, it was first necessary to establish a baseline and clarify what smallholders in the pilot sites know about the EUDR information requirements and what their current

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<sup>1</sup> It was initially planned to conduct separate assessments for the two components of the project, which focus on agricultural and environmental practices (Outcome 1) and on improved value-chain management and ability to provide EUDR-relevant information (Outcome 2). However, it was later determined to be more efficient to conduct the assessments at the same time, as it would reduce the number of flights and ease the burden on smallholders, who would only be inconvenienced once. See the companion briefing on business practices and causes of supply chain fragmentation for more information on that aspect of the assessment.

value chain management practices are. This is important for assessing project progress, but it is also the necessary first step in responding to the needs of smallholders.

Although smallholder producers remain the primary beneficiaries of the project, collection centre operators were also included in the assessments since value chain management necessarily includes aggregation of rubber at collection centres. In this context, slightly different questionnaires were developed for smallholders and collection centre operators, with the following principles in mind: although the assessment may deal with complex issues, the questions must be simple and easy to understand; questions must be linked to informing the activities under the project; and the assessment should not be overly burdensome to smallholders in terms of time and travel.

Questions were broadly grouped into two areas. The first area focused on the information management practices of both smallholders and collection centre operators. For smallholders, this included the type of information they have available and provide to collection centres; whether they can provide evidence of deforestation-free production, such as the plantation establishment date; and the availability of geolocation information for their rubber plots. For collection centre operators, questions in this area focused on what information they collect and how they manage it; the extent to which they know their smallholder suppliers; whether there was a Chain of Custody (COC), or components of a COC, in place; and the type of information, if any, that was transferred to actors downstream in the value chain.

The second area focused on smallholders' and collection centres' knowledge and understanding of the EUDR objectives and information requirements, with no difference in the questions for the two groups. Interviews were semi-structured to allow opportunities for assessors to pursue other interesting and related lines of inquiry, and for respondents to share their opinions.

## Results of assessment of Phanoi Cooperative – 14-18 July 2025

In the Phanoi Cooperative, 106 smallholders were interviewed, as well as 9 members of the cooperative's board, for a total of 115 participants<sup>2</sup>. All the responding smallholders stated that they or their family members had ownership or land-use rights over the plots on which they grow rubber,

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<sup>2</sup> There is one main collection centre in Phanoi Cooperative, so the questionnaire for collection centres was not used.

though different plots sometimes have different types of title or permit. These can include land title deeds, such as NS 3 and Sor Por Kor.



**Students under Dr Itsaree Howpinjai capture the responses of smallholders from the Phanoi Cooperative.** Somporn Khongtanakrittakorn

Cup lump rubber from smallholders is delivered to the cooperative collection centre either by the owner of the land, a legal representative of the owner, or one of the owners' workers. The cooperative does not have an authorised suppliers' list, though it does have a simple organisation chart outlining the responsibilities of key members. In most cases, smallholders submit only basic information, such as their name together with their cup lump rubber.

Regarding geolocation, nearly 80% of respondents stated that they had collected GPS coordinates for their boundaries using the Ling application. All smallholders confirmed that they were willing to share geolocation and yield information for purposes of traceability and reconciliation, though nearly 70% did not record production volume, selling price, or income. On the issue of segregation, approximately 90% of respondents stated they had no arrangement for separating rubber according to the plot of land on which it was produced.

According to respondents, rubber plots began to be established in Phan Noi sub-district on a large scale in 2006, indicating that most forest clearance occurred before the EUDR 'cut-off date' of 31 December 2020. However, only approximately 50% of respondents had documentation indicating plantation establishment before that date, such as a legal title deed or RAOT registration documents. Knowledge about the EUDR and its information requirements was very limited, though some smallholders had heard of it in the context of a possible price premium for 'EUDR rubber', which interested them.

# Results of assessment of Chana Cooperative – 4-8 August 2025

In the Chana Cooperative, 91 smallholder producers and 45 collection centre operators were interviewed. Concerning the smallholders, most of those who supply latex to cooperative collection centres have some form of documentation indicating a legal title or land use right – only approximately 3% have no such documentation. Many smallholders have more than one plot of land, sometimes covered by different types of land title or permit. Latex from smallholders is delivered to collection centres either by the owner of the land, the lessee of the land, or partners – sometimes the tappers – who manage the land on behalf of the owner. At the time of the assessment, approximately 55% of smallholder members have recorded their geolocation information, seeming to indicate that not all smallholders within the Chana Cooperative have been registered under the NRM<sup>3</sup>.

Regarding collection centres, all operators stated that they maintained purchase record logbooks documenting key details such as the date of purchase, volume, price paid, and farmer name or ID. Nearly 90% of collection centres also implemented latex quality inspections, such as checking for impurities and evaluating cleanliness, which were sometimes recorded to ensure traceability and quality control. Additionally, slightly more than 50% of centres applied criteria for rejecting latex, considering factors such as quality and dry rubber content, indicating a capacity for product segregation.

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<sup>3</sup> As part of the NRM registration process, smallholders have the geolocated boundaries of their lands verified by RAOT officials.



**Dr Sara Bumrungsri interviewing a collection centre operator in Chana Cooperative.** Somporn Khongtanakritakorn

Although the collection centres under the Chana Cooperative are registered with the NRM system and buy from cooperative smallholders, there is still a need to strengthen value chain management to ensure integrity. Regarding knowledge about the EUDR, neither smallholders nor collection centre operators could provide many details, indicating a very limited understanding.

## Local validation workshops

Following the baseline assessments, the project team organised two validation workshops to present their findings to the participating cooperative members for review and feedback. The first was held on 9 September at the Phanoi Cooperative in Loei Province, while the second was held on 24 September at the Chana Cooperative in Songkhla Province. Workshop participants were separated into focus groups to review and discuss the key findings, and to brainstorm ways to improve value chain management and the most effective means of building smallholder capacity.



**Dr Itsaree Howpinjai of the EFI team presenting at the local validation workshop for Phanoi Cooperative. Somporn Khongtanakrittakorn**

Participants from both pilot sites confirmed that rubber is produced on a variety of plots, with different types of legal land use titles and permits – and in some cases with no formal legal title or land-use right. They also confirmed that the collection of information from smallholders was often limited, such as in Phanoi Cooperative, or subject to different standards at cooperative collection centres, such as in Chana Cooperative.

Due to the relative novelty of the information requirements under the EUDR and low level of awareness of smallholders about the EUDR, there was limited feedback about the challenges to providing and transferring the information needed to demonstrate deforestation-free and legal production. The obvious technical issue that was raised by some was how to collect geolocation information, but most were aware that various options are now available.

Regarding training, in addition to conventional instruction respondents suggested information exchanges and visits to cooperatives which operate secure CoC systems, to demonstrate what actually works in practice. Suggestions were also made to develop simple e-learning modules, potentially with explanations using short, easy-to-understand animation.

# National validation workshop and next steps

To complete the assessment process, a national validation workshop was held on 31 October at RAOT headquarters in Bangkok to present the findings from the baseline assessments in the two pilot sites. The workshop was attended by representatives from the leadership of the two pilot site cooperatives, as well as RAOT officials from nine regional offices. The results of the assessments were reviewed and validated, and valuable input collected from the RAOT officials.



RAOT focus group discussions at the national validation workshop at RAOT headquarters in Bangkok. EFI

Overall, feedback from RAOT officials confirmed the findings from the baseline assessments and validation workshops, noting difficulties of controlling the value chain to ensure integrity and issues with legal ownership of land. They also raised some additional issues, such as rubber being imported from neighbouring countries, and opportunities for mixing when rubber has to be transported long distances, as well as highlighting the practical challenges to maintaining an effective segregation and information management system – technical capacity and costs. On the issue of EUDR awareness, RAOT officials noted that some smallholders and cooperatives have yet to receive any training, and that even those that have do not fully understand or appreciate what needs to be done, especially regarding segregation and traceability.

Based upon the validated results, the EFI team proposed to develop a training curriculum and materials for instructing smallholders and collection centres in the pilot sites about appropriate segregation and traceability practices. This will include a simple instructional manual, including images and diagrams, which collection centre operators can use, as well as posters that can be

displayed at the collection centres. To ensure that these can be used after the project comes to an end, the curriculum and materials will be developed in close collaboration with the relevant RAOT departments and personnel and thoroughly tested in the pilot sites.

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