



THAILAND: TEXTILE INDUSTRY

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TEXTILE INDUSTRY

Competing among **leading global textile producers**, Thailand's textile industry has developed significantly over the past five decades. From a strong historic base of silk and cotton production, the textiles and apparel market in Thailand is consistently growing and developing to meet ever changing consumer trends.



**11th
Largest**

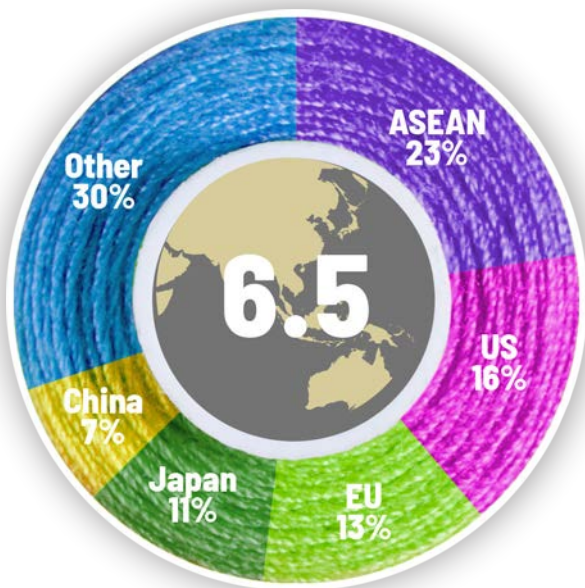
Asian Exporter of Apparel and Clothing Accessories¹

Each year, tremendous volumes of high quality fabrics and apparel from Thailand are sold domestically and exported to rest of the world. **In 2016, the industry's export revenue was valued at almost USD 7 billion, contributing to over 3% of total exports,**² with countries in ASEAN, the US, Europe and Japan as key customers.

Sources: ¹Thai Customs
^{2,3}Thailand Textile Institute

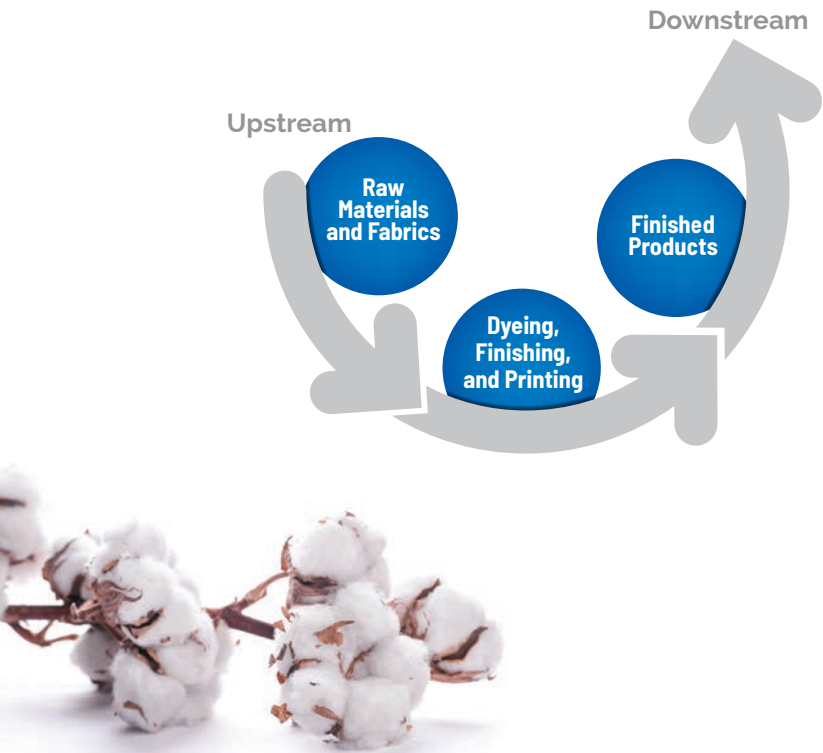
Thai Textile & Clothing Exports, 2016³

[In Billions USD]



Thailand is one of the few countries in the world that provides the whole value chain of the textile industry, from upstream, midstream, to downstream. With over **4,700 local textile producers**,¹ Thailand hosts a **full range of activities across the entire textile value chain**, ranging from the production of fiber, and fabric, all the way to the design, manufacturing and sales of apparel and functional textiles.

Value Chain of the Textile Industry



Raw Materials and Fabrics

Fibers

Thailand's Synthetic Fiber Ranking²



Ranked the **9th largest polyester producer**, and the **5th largest acrylics producer in the world**, Thailand is a leading global producer of synthetic fibers. The country produces approximately **900,000 tons³** of synthetic fibers every year. Both the domestic production and local consumption of man-made fibers **had impressive y-o-y growth rates in 2016 at 6.4% and 12.3%⁴** respectively.

Sources: ^{1,3} Thailand Textile Institute; ²Fibers and Filaments;
⁴Office of Industrial Economics

With our strong base in the petrochemical industry and cutting-edge technology, Thailand is home to major producers of synthetic fibers in the region, which include many **joint ventures and subsidiaries of multinational companies** such as **Indorama Polyester, Teijin Polyester** and **Thai Toray**.

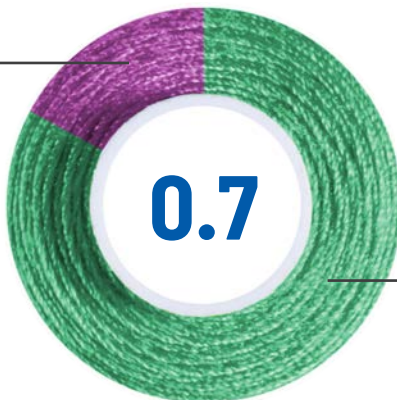
Yarns

With a continuously developing and evolving textile industry, Thailand has increased its production efficiency to produce high-quality yarns. Thai manufacturers spin more than **800,000 tons of cotton and man-made yarns¹** each year, of which **70% are consumed domestically**. In 2016, the export of yarns alone was worth over **USD 700 million.²** Major export destinations include Indonesia, Taiwan, China and Japan.

Thailand Export of Yarns, 2016³

[In Billions USD]

Cotton Yarn
17%



Man-made Yarn
83%

Sources: ^{1,3}Thailand Textile Institute
²Thai Customs



Fabrics

With an abundance of high quality raw materials, Thailand is known for its ability to **weave and knit world-renowned fabrics at a superior quality**. In 2016, Thailand exported over **USD 1.2 billion¹** worth of fabrics, mainly to ASEAN countries.

Through decades of heavy investments in R&D, Thailand adopted ground-breaking technologies becoming a leading producer of fabrics in the region. Recently, the Thai Textile Institute invented the “**smart fabrics quality mark**,” to support producers in increasing their competitiveness by ensuring their product quality and standards.

Silk

With almost **USD 4.6 million²** in export value each year, Thailand is ranked as the **seventh largest Asian exporter³**. Silk has a long history in positively shaping the heritage of the Thai textile industry. Representing a truly authentic Thai fabric, the original hand-woven process showcases the beauty of silk which is unique across the different regions of Thailand.

Global Thai Silk Brand



JIM THOMPSON

Thai silk brands are renowned throughout the world for their outstanding quality and fabrics.

Thailand's Silk Association

- Her Majesty Queen Sirikit's Foundation for the Promotion of Supplementary Occupations and Related Techniques
- Thai Silk Association

Sources: ^{1,2}Thailand Textile Institute

³Thai Customs

spandex

Processed from elastomeric synthetic fibers, spandex is a fabric that offers considerable flexibility to many underwear and sportswear brands. The global spandex market is expected to grow at a **CAGR of over 8%** from 2016-2023 for which the **Asia-Pacific is expected to account for more than 60% of global production.**¹ With a number of producers in Thailand, spandex serves as a strong foundation for Thailand's rapidly growing sportswear industry.

KEY PLAYERS



Dyeing, Finishing, and Printing

Currently, Thailand has more than **400 factories**² which are operating in the dyeing, finishing and printing of yarns and fabrics to serve the local clothing industry. New and inventive technologies, such as **3D and digital printing**, are being applied to further increase the value of fabrics.

An increasing number of Thai factories are also shifting their production lines to **advanced automation** including Luckytex (Thailand) PLC and Erawan Textile Co., Ltd.

KEY PLAYERS



Sources : ¹Textiles focus
²Thailand Textile Institute



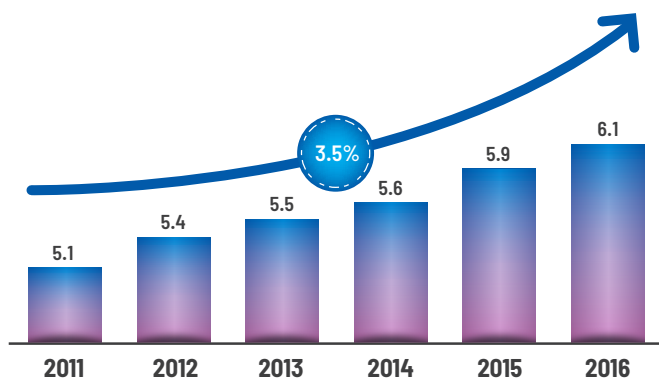


Finished Products

In addition to the textile market, finished clothing products are thriving in Thailand including both apparel and non-apparel items. **The apparel retail market has been growing at 3.5% year-on-year, triple the global growth rate.¹**

Thailand's Apparel Retail Value²

[In Billions USD]



KEY PLAYERS



Source: ^{1,2}Euromonitor

Note: *Compound Annual Growth Rate (2011-2016)



Designer Items and the Fashion Industry

Having chosen Bangkok as a Global Fashion Capital, Thailand's fashion industry is doing exceptionally well with its exquisite designs, and advanced manufacturing processes and standards. With strong government support, for over 10 years, the country hosts many well-regarded regional and international fashion events including **Bangkok International Fashion Week, Elle Bangkok Fashion Week, and the Bangkok International Fashion Fair.**

Moving beyond typical cut-make-and-trim OEM production, the country is also home to many Thai designer brands, including **NaRaYa, AIIZ, Jaspal, CPS Chaps, Sretsis, Disaya, and Doi Tung** which have taken successful steps in increasing their brand awareness throughout the world, as well as other brands such as **Dry Clean Only** which are well-known among Hollywood celebrities.



KEY PLAYERS

AIIZ

DAPPER

DISAYA

GREYHOUND
ORIGINAL

SIRIVANNAVARI
BANGKOK



DOI TUNG

FLYNOW



DRY CLEAN ONLY
BANGKOK

MC GROUP

JASPAL

Apparel



Offering a complete value chain, over **80%** of raw materials including fabrics and yarns can be sourced locally, as Thailand is home to more than **2,100 clothing manufacturers**.¹

The country is known for its highly-skilled and competitive workforce and product quality. A number of well-known global brands, including **Nike, Adidas, and GAP**, outsource their production to Thailand.

Large clothing manufacturing companies, such as **High-Tech Apparel Co., Ltd., ICC Co., Ltd., Hong Seng Knitting Co. Ltd., Nan Yang Textile Co. Ltd., and Sahapat Co., Ltd.**,

continue to dominate the Thai market, and deliver high quality clothing to the rest of the world. The major export destinations include the US, EU, Japan, China and Vietnam.

Womenswear and Menswear

Growth in the Thai womenswear and menswear market in 2016 was **4% and 3%** respectively.² The market for both womenswear and menswear is expected to reach **USD 3.5 billion and USD 2.6 billion by 2021**.³ While the Thai womenswear market is slightly larger than the menswear market, male customers tend to have a greater sense of loyalty to their favorite brands. A number of global brands are performing very well in the Thai market including **Uniqlo, H&M, Zara and G2000**.

Sources: ¹Thailand Textile Institute; ^{2,3}Euromonitor

Jeans

The jeans market in Thailand is expected to reach **USD 426.7 million in sales by 2021.**¹ Jeans will remain a favorite leisurewear item among consumers' worldwide for the foreseeable future. **Mc Jeans** is a successful Thai brand that has grown in popularity throughout the region in addition to imported brands such as Levi's and Diesel.



Undergarments

Undergarments in Thailand reached sales of **USD 1.7 billion in 2016**, an annual growth rate of 6.5% from 2011.² Among all womenswear categories, women's undergarments maintained the highest value in terms of sales. Thailand is a production hub for many global undergarment brands including **Wacoal, Triumph, J.Press and Arrow**. Undergarments produced in Thailand are recognized for both their high quality and durability from the complete value chain and the superiority of synthetic yarns supplied by local producers.

Source: ^{1,2}Euromonitor

KEY PLAYERS



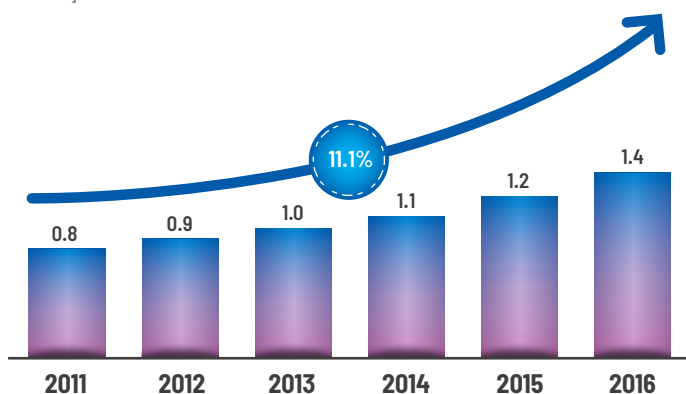


Sportswear

Thanks to the increasing interest in health and wellness, sportswear is enjoying a **double-digit growth rate** and is valued at **USD 1.3 billion**.¹ While men are the core consumers of sportswear, an increasing number of women are making purchases in this category, since more are leading active lifestyles and spending increased time exercising on a regular basis. Consumers in Thailand tend to wear sportswear for both fashion and functional purposes, due to the ongoing health and wellness trends. Companies such as **High-Tech Apparel Co., Ltd.**, **Tuntex Textile (Thailand) Co., Ltd.**, **Thai Asahi Kasei Spandex Co., Ltd.**, **Nice Apparel Co., Ltd.**, and **Sahapat Co., Ltd.** are meeting the production needs of the growing sports market.

Sales of Sportswear in Thailand²

[In Billions USD]



Source: ^{1,2} Euromonitor

Non-Apparel

Home Textiles

Thailand's home textile products, including bedding, curtains, bathroom textiles, and carpets, are exported throughout the world. What sets apart Thai home textile products from other countries are their delicate designs and hand-woven processes, ensuring that products achieve a premium quality that is widely recognized around the world. In 2016, **Thailand exported over 121,000 tons of home textiles**, at a value of **over USD 260 million**.¹

In addition to their attractive designs, various companies including PASAYA and TAI PING have developed state-of-the-art innovation into their wide-range of products, such as flame retardant and anti-allergic fabrics, to cater to changes in customer preferences.

Source: ¹Thailand Textile Institute



KEY PLAYERS

SANTAS[®]
HOME

TAI PING

PASAYA

JIM THOMPSON

Carpets Inter[®] TPCORP



Established Wholesale Textiles Markets

In addition to extensive textile and clothing manufacturing, Thailand also hosts one of the largest garment marketplaces, and world-renowned fashion districts in the region.



Originating from the influx of Chinese immigrants in the early 1900s, **Bobae Market** was established to allow the newly arrived migrants to make a living. Today, Bobae has grown into **one of the largest market places for textile products in Asia with over 3,000 shops.**¹ It is well-known for its high quality products which are available at competitive prices. The market serves as a major fabric sourcing location for Thai designers. Many foreign

customers from Cambodia, Laos, Vietnam, Malaysia and Singapore also order fabrics directly from Bobae, resulting in trading value worth over **USD 900 million annually.**² Additional wholesale textile markets include **Sampeng** and **Pahurat**, while the more famous wholesale clothing markets among locals and tourists alike include **Chatuchak weekend market, Platinum Mall** and **Pratunam** in Bangkok.

Source: ^{1,2} King Prajadhipok's Institute

OPPORTUNITIES

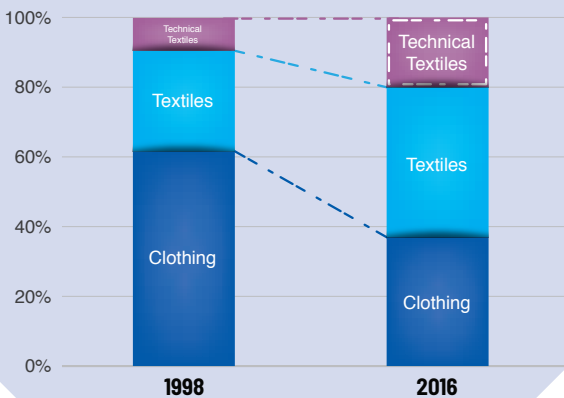
Thailand is ramping up its competitiveness by focusing on innovation, value-added products and technologies. The government is providing additional incentives along with infrastructure development to further support growth in the country's textile industry.

Technical Textiles

The global technical textile market is expected to **exceed USD 160 billion by 2020.**¹ To serve this growing market, Thailand's textile industry has been significantly enhanced in both its variety and functionalities, offering fabrics with functions that go far beyond clothing and home furnishings. Currently, the country is ranked as the **28th largest exporter of functional textiles.**² With groundbreaking technologies and advanced capacities, Thai manufacturers are offering products with unique and cutting-edge properties, ranging from **flame retardant, temperature regulated and antimicrobial** fabrics.



Changing Export Structure - Thailand's Textiles Industry³



Sources: ¹Global Industry Analysts, Inc.

²International Trade Administration; ³ Thailand Textile Institute

Mobiltex

Automotive textiles represent the most valuable market for functional textiles in the world. These materials offer a wide range of applications. It is estimated that **by 2020, over 35 kilograms of an automobile's total weight will be from fabrics**, increasing from 26 kilograms in 2010.¹ More than half of automotive textiles are for interior trim such as carpets, seat covers, doors, and roof liners – apart from being used to strengthen tires, hoses, safety belts and air bags.

Currently, Thailand has **over 100 automotive textile manufacturers**.² A number of leading Japanese automotive textile companies have their production plants in Thailand. As the largest automotive producer in Southeast Asia, Thailand manufactured more than **1.9 million vehicles in 2016**³ making the country an ideal location for automotive textile production in the world.

Sources: ¹Office of Industrial Economics

²Thailand Textile Institute

³OICA as of March 2017



KEY PLAYERS



SAHAPAT



SAHA SEIREN





Protective Textiles

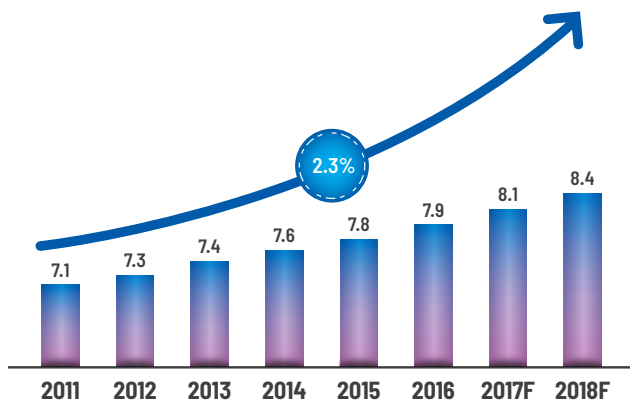
Protective textiles, ranging from particulate protection, flame retardant, to cut resistant, are designed to protect the wearer from harsh environmental effects that may result in injuries or death. The demand for protective textiles in Thailand continues to increase annually, and is expected to reach

USD 8.4 billion in 2018.¹ The flame-resistant suit is one of the most common protective uniforms.

Thailand is home to many leading protective textile manufacturers including **Insuretex** and **Glofab**, which serve both local and foreign markets.

Sales of Protective Textiles in Thailand²

[In Billions USD]



Source: ^{1,2}Thailand Textile Institute

Medtex

In 2016, the combined market for medical devices in the ASEAN Economic Community (AEC) was approximately USD 2.8 billion. **Thailand, as an international medical hub, had the largest market share at 28%**, followed by Malaysia, Indonesia and Vietnam.¹ As a result of the huge local demand in healthcare and hygiene products, it is expected that by 2019, the country will need more than **700,000 medical uniforms**, excluding surgical and patient clothing.² With **roughly 59 manufacturers** in 2016, the value of Thailand's medical textiles reached **USD 600 million** with an average annual growth rate of 3.4%.³

KEY PLAYERS



Agrotex

Thailand is privileged to be **one of the top locations for agriculture. A total of 35% of the country's workforce is employed in the agricultural sector**, resulting in an excellent ecosystem for farming.⁴ With a wide variety of quality crops, Thailand is the **world's top exporter of cassava, sugar, rice and palm oil**. Agricultural textile products, such as **soil-moisture retention** and **agricultural nonwoven bags**, offer high growth potential, and are expected to boost productivity in farming in the long-run.

Sources: ¹Office of Industrial Economics, Thailand

^{2,3}Thailand Textile Institute

⁴National Food Institute, Thailand

KEY PLAYERS



New World International





Nanotechnology in Textiles

Water-repellent Fabrics

One of the first products produced through nanotechnology was a water-repellent fabric, and this market is expected to reach **over USD 2 billion globally in 2024.**¹ This technology enhances the customer's experience, and is continuing to bring huge returns and growth to manufacturers.

Anti-bacterial Textiles

Driven by increasing **trends in health and wellness**, consumers are becoming more informed about hygiene. Antibacterial textiles, a pioneer in the textile industry, were established to serve many sectors across the region. A number of functional textile manufacturers are shifting to produce **anti-bacterial products**, such as sportswear, bandages, and medical uniforms. **Perma Corporation** is the leading producer in developing Nano Zinc Technology, the first permanent anti-bacterial textile in Asia.

Source: ¹Hexa Research

KEY PLAYERS



WHY THAILAND?

Completed Value Chain

With a complete value chain, Thailand has roughly **4,700 textile manufacturers**, ranging from fibers, yarns, dyeing to clothing.¹ The textile industry has developed significantly for over 50 years passing on the knowledge, expertise and competencies of manufacturers from previous generations. Combined with cutting-edge technologies, Thailand has become the main producer and exporter of several textile products, qualified by global standards.

To further increase its competitiveness and productivity, a number of manufacturers are employing the **smart factory** concept, utilizing computerized systems to increase efficiencies in their production processes. In addition to strong environmental regulations and standards, Thai producers are also moving towards green production by supporting recycled raw materials and generating more advanced solid waste management plans.

Sources: 1Thailand Textile Institute



Highly-skilled Workforce

The Thai workforce is known around the world for their **amazing craftsmanship**. To enhance its competitiveness, the Thai government is working hard to ensure a robust labor force for the textile industry. The country is equipped with well-qualified researchers and experts covering every process dealing with textile production. Currently, there are roughly **500,000 workers employed in this important sector**.¹



Strategic Location with Excellent Logistics Networks

Positioned in the **best location in Southeast Asia**, Thailand is well-connected to ASEAN and other countries in the Asia-Pacific. The more than 640 million consumers across Southeast Asia offer numerous opportunities for the textile industry. **World-class infrastructure** such as Suvarnabhumi International Airport, Laem Chabang deep sea port, and other trade routes allow Thailand to connect with many destination countries. Combined with FTAs with ASEAN countries, Thailand is more than ready to better serve logistics needs.

Sources: ¹Thailand Textile Institute



INVESTMENT INCENTIVES

BOI Incentives



The BOI recognizes the importance and value of the textile industry, and offers a wide range of tax and non-tax incentives for projects that meet national development objectives.

Non-Tax Incentives

These activities also receive the following non-tax incentives:

Permit to bring in expatriates	Permit to own land	Permit to take or remit foreign currency abroad
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Tax Incentives

		INCENTIVES	
GROUP	ELIGIBLE ACTIVITIES	Corporate income tax Exemption	Exemption of import duty*
A1	• Creative product design and development center	8 years (No Cap)	✓
A2	• Manufacture of technical fibers or functional fibers	8 years	✓



Note: * Exemption of import duty on machinery and raw or essential materials used in manufacturing export products

INVESTMENT INCENTIVES

Tax Incentives

GROUP	ELIGIBLE ACTIVITIES	INCENTIVES	
		Corporate income tax Exemption	Exemption of import duty*
A3	<ul style="list-style-type: none">• Manufacture of functional yarns or functional fabrics• Bleaching, dyeing and finishing, or printing and finishing, or printing	5 years	
A4	<ul style="list-style-type: none">• Manufacture of recycled fibers• Manufacture of other yarns or fabrics**• Manufacture of garments, clothing accessories, and household textiles**• Manufacture of non-woven fabrics or hygienic products made of non-woven fabrics	3 years	
B1	<ul style="list-style-type: none">• Manufacture of other fibers or fabrics• Manufacture of other yarns or fabrics***• Manufacture of garments, clothing accessories, and household textiles***	-	

Note: * Exemption of import duty on machinery and raw or essential materials used in manufacturing export products

 ** ** Projects with investments or expenditures on research, design or product development of not less than 0.5% of the project's total revenue of the first 3 years combined.

 *** ** Projects with no investment or expenditures on research, design or product development or if the investment on research, design or product development is less than 0.5% of the project's total revenue of the first 3 years combined.



Supporting Organizations



Thailand Textile Institute

Supports the textile industry through various segments such as Innovation, Design and Networks for increased competitiveness to meet local, regional and global requirements.



Textile Industry Club

Supports and strengthens the relationship between the club's members to further improve the network in order to enhance efficiency in the textile industry.



Thai Garment Manufacturers Association

Supports ASEAN's fashion and apparel businesses globally and leverages ASEAN's resources and markets to create value added in Thailand.



Thai Textile Merchants Association

Exchanges information and data resources to help resolve its members' difficulties such as labor and tax laws, and implements knowledge for textile businesses to increase production, marketing and investments.



Thai Weaving Industry Association

Aims to develop the Thai textile and weaving industry by improving production methods, the quality of woven fabrics, dyeing techniques, printing and finishing to stay close to fashion trends and adapt to changes.



The Thai Silk Association

Preserves Thai silk as an exceptional cultural heritage, prevents silk that is made from synthetic fibers that is shipped as claiming to be Thai silk, and supports efforts to ensure that authentic silk remains well-known around the world.



The Association of Thai Bleaching, Dyeing, Printing and Finishing Industries

Represents wet processing manufacturers with a function to disseminate knowledge and act on the suggestions of members to concerned governmental organizations in the formulation of national policies.



The Bobae Garment Association

Promotes economic policies in support of the association, facilitates information services to both local and international partners, and supports members in the export of their products.

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Think Asia, Invest Thailand



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