

# Textile and Clothing Industrial Situation (October 2023)

**Thailand Textile Institute: THTI**  
Information and Digital Industry Center  
(November 30, 2023)

## **Chapter 1 :**

# **The Textile and Clothing Structure and Thailand's Economic in 2022**

Summary:

# Thailand's textile development in the post-epidemic era



**Thailand's textile and garment industry** continuously generates revenue for the country. In 2022, the trade value of Thailand's textile and garment industry in the world market accounted for over 6,850 million USD or up 5.0% (YoY) and the industry could sustain a large number of work force in the manufacturing sector. **Therefore, progress or slowdown of the domestic textile and garment industry will have significant impact on Thailand's economy and society.**

# Gross Domestic Product : GDP

Originating from Manufacturing at Current Market Prices

--- for the year 2021/22

Textiles subsector **4,918.3** Million USD

(Textiles) **2,422.3** Million USD

(Wearing apparel) **2,496.0** Million USD

Share of GDP (%) **1.2**

Share of GDP in manufacturing (%) **4.4**



# Composition

## of Private Final Consumption

Expenditure by Type and Durability at Current Market Price

- - - for the year 2021/22

Clothing and Footwear **9,097.6** Million USD  
Share (%) : **3.5%**  
Growth Rate (% YoY) : **-8.7%**



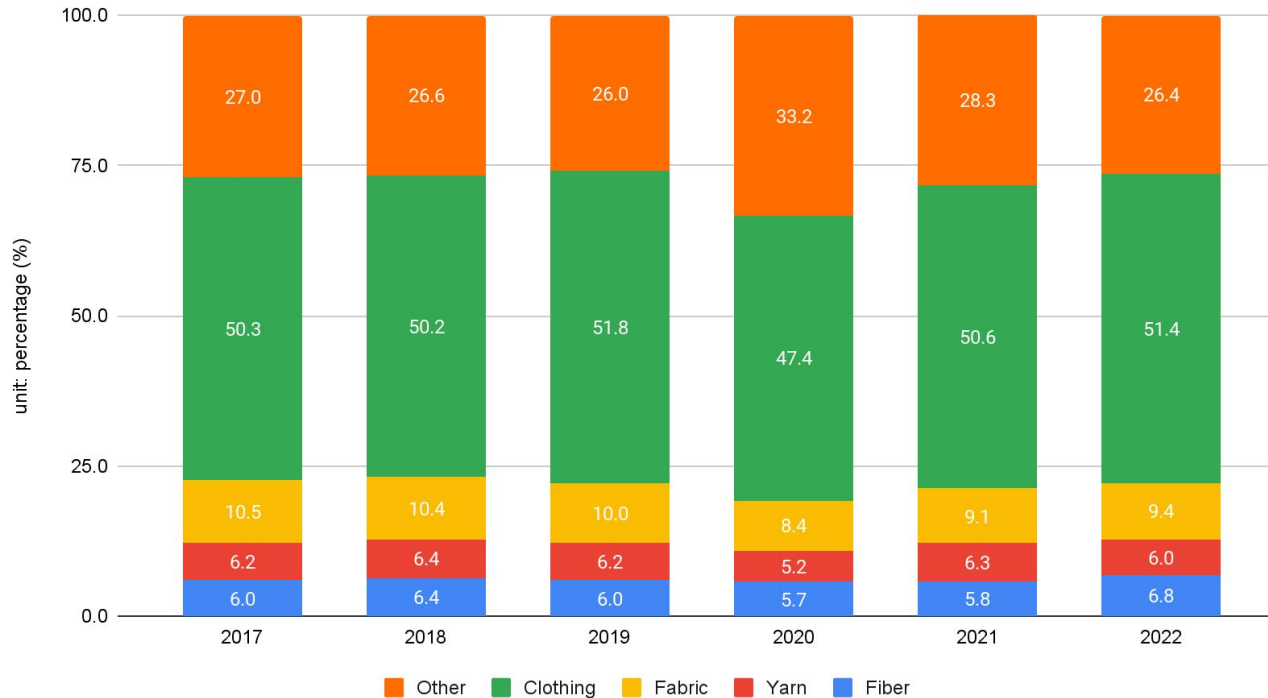
Clothing **8,279.3** Million USD  
Growth Rate (% YoY) : **-8.3%**



Footwear **818.3** Million USD  
Growth Rate (% YoY) : **-12.5%**

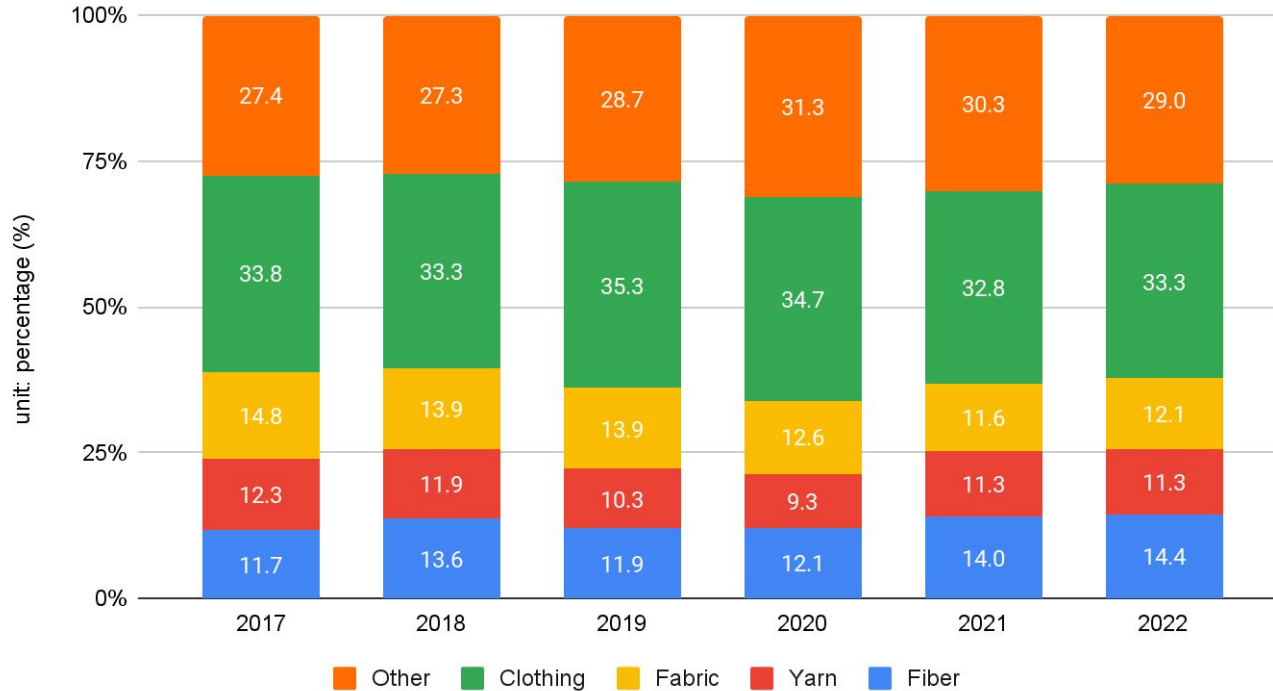


## Structure of [the world's](#) textile and clothing export (main products)



Based on the study and the compilation of statistics of Global Trade Atlas (GTA), it was found that **in 2022 most of the world's export was clothing** contributed to 51.4%, followed by other textile (Others) 26.4%, followed by fabric 9.4%, and fiber and yarn 6.8% and 6.0% respectively.

## Structure of Thailand's textile and clothing export (main products)



Based on the study and the compilation of statistics of Global Trade Atlas (GTA), it was found that **in 2022 most of Thailand's export was clothing** contributing to 33.3%, followed by other textile (Others) 29.0%, followed by fiber 14.4%, fabric 12.1%, and yarn 11.3%.

## Summary: Overview of the export structure of Thailand and the global market

- Export structure of textile and clothing of Thailand and the global market **had the same export direction**
- The **export ratio of Thailand's textile** in the upstream and the midstream industries (fiber, yarn, and fabric) was 37.8%.
- Whereas in **the global market, the export** was only 22.2% in 2022
- It showed that **Thailand's export** placed importance on the **upstream** industry and the midstream industry
- Whereas in **the global market**, most would focus on the export of the **downstream** industry or mainly clothing.



## Chapter 2 :

# Situations of Thailand's Textile and Clothing at Current (January-October 2023)

# Summary **Value** and export **markets** of Thailand's textile and clothing industry (January-October 2023)

## Export **value** of Thailand's textile and clothing

	January-October 2022	January-October 2023
Value (Million USD)	<b>5,826.1</b>	<b>5,052.9</b>
Growth rate (% YoY)	<b>+9.3%</b>	<b>-13.2%</b>

## Export **markets** of Thailand's textile and clothing

Top 3 export markets of textile and clothing in **January-October 2023 %Δ (YoY)** :-



**USA**

**-16.6%YoY**

Share 18.2%



**Japan**

**-6.6%YoY**

Share 11.8%



**Vietnam**

**-13.1%YoY**

Share 7.7%

**Export** of Thailand's textile this year (overall) may not be bright due the following reasons:

- 1) **The 2022 base year was quite high** (overall textile export in the previous year **+5.0% YOY**). Therefore, the increase of export this year will be quite difficult.
- 2) As **the global economy is not very bright** especially major trading partners (such as USA, Japan, Vietnam) who import a lot of textile and clothing from Thailand, this year it is expected to decline due to the slowdown of the domestic economy of the trading partners.
- 3) Due to **the inflation worldwide** especially in Western countries, the purchasing power of consumers declines. With the decreased purchasing power, the consumers' demand of goods decreases as well. Therefore, the export of Thailand's textile and clothing this year tends not to be very bright compared with the previous year.

## **Chapter 3 :**

# **Movement of Thailand's Textile and Clothing forward**



## Vision

"Promotion of Investment to restructure Thailand's economy into new economy" with the main objectives of restructuring Thailand's economy to achieve 3 aspects consisting of:

### Innovative

Being an economy that is driven by technology, innovation and creativity.

### Competitive

Being an economy that is competitive, adaptive and generate high growth.

### Inclusive

Being an economy that values environmental and social sustainability, creates opportunity and reduces inequality.

# Five-Year Investment Promotion Strategy (2023- 2028)

According to the Announcement of the Board of Investment No.8/2565 Policies and Criteria for Investment Promotion announced on December 8, 2022 which is enforced on BOI applications submitted from January 3, 2023, onward:



The Guide to the Board of Investment was prepared by the Office of the Board of Investment to provide information regarding investment promotion, including benefits and privileges, list of eligible activities, related announcements and, also, investment promotion application's criteria and conditions. For the most recent updates and amendments of the list of promoted activities, please scan:

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# Thailand's movement

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**Thailand has high potential in the development of green textile innovation** due to the abundance of raw materials from nature. Moreover, the design and technology are based on local wisdom combined with advanced technology leading to green products, production of environmental-friendly products, and reduction of carbon footprint.

The Thai government stresses the importance of the policy to support **Soft Power to drive Thailand's creative industry for global recognition**. It also recommends government agencies to work with the private sector covering producers, artists, and those behind the scene to drive **Soft Power for the maximum economic benefit in accordance with the policy to promote culture** so that it becomes Thailand's major cultural resources such as Food, Films, **Fashion**, Fighting, and Festivals.

**Soft Power** has become an important tool to increase economic value especially the recovery after the spread of COVID-19 pandemic towards the policy of Creative Economy, the development of knowledge based on intellectual property, education, and creativity which link with culture, society's accumulated knowledge, technology, and innovation in order to **be used for business development, production of goods and services in new forms**.

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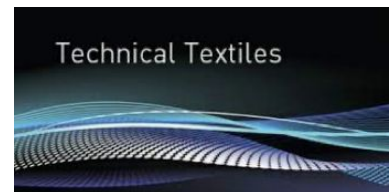
# THAILAND



# DIRECTIONS FOR TEXTILE AND CLOTHING

- Base on the projects approved by Board of Investment of Thailand from the Year of 2022 >>>> Technical Textiles , Functional Textiles , Recycle Fiber, Non-Woven , Hygiene Products , Medical Textiles etc .
- Product Standards : Mandatory and Recommendation
- Natural Fibers : Hemp , Pineapple and Sustainability concept , CE concept etc
- Digital Platform : [www.textilessquare.org](http://www.textilessquare.org)

**BCG** Economy  
**Soft Power**

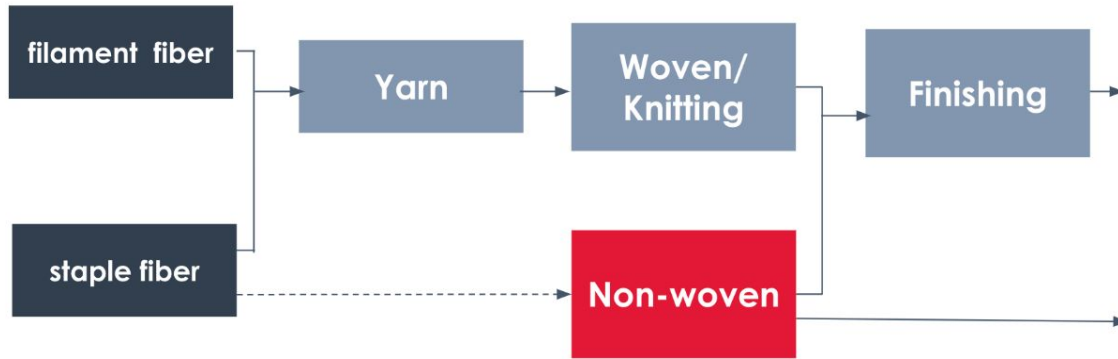














# Competitive Advantage : Technical Textiles

## Technical Textiles Upstream

## Technical Textiles Midstream

## Technical Textiles Downstream



	<b>Agrotech</b> Horticulture + landscape gardening, agriculture + forestry, animal keeping		<b>Meditech</b> Hygiene, medicine
	<b>Buildtech</b> Membrane, lightweight + massive construction, engineering + industrial building.		<b>Mobiltech</b> Cars, ships, aircraft, trains, space travel
	<b>Clothech</b> Garments, shoes		<b>Oekotech</b> Environmental protection, recycling, waste disposal
	<b>Geotech</b> Road infrastructure, Railways, Irrigation and Hydraulic structures, Waste Landfills, Dams etc.		<b>Packtech</b> Packaging, protective-cover systems, sacks, big bags, container systems
	<b>Homotech</b> Furniture, upholstery + interior furnishing, rugs, floor coverings		<b>Protech</b> Person and property protection
	<b>Indutech</b> Filtration, cleaning, mechanical engineering, chemical industry		<b>Sporttech</b> Sport and leisure, active wear, outdoor, sport articles.

Source : <https://textilebasics.wordpress.com/category/3-technical-textile/>

**Technology & Innovation**

# Creative Economy driven Industry toward Sustainability

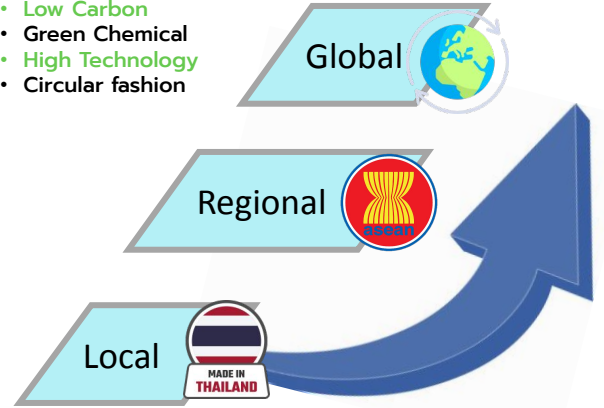
- High Energy
- **High Carbon**
- Toxic Dyes and Chemicals
- **Low Labor**
- Throwaway (Fast) Fashion

Old Society

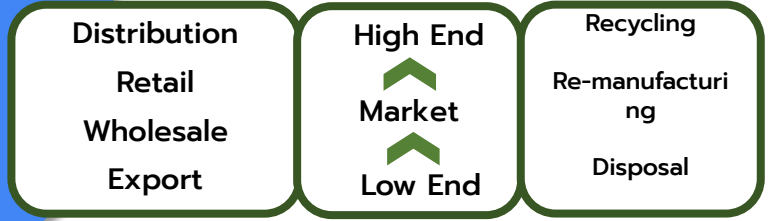
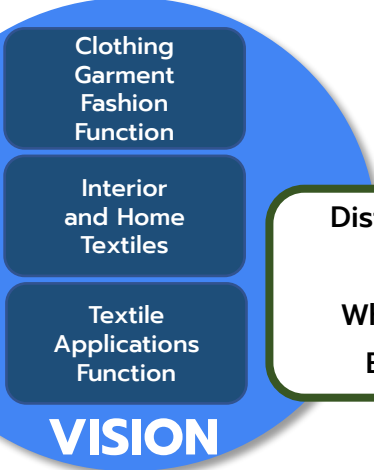
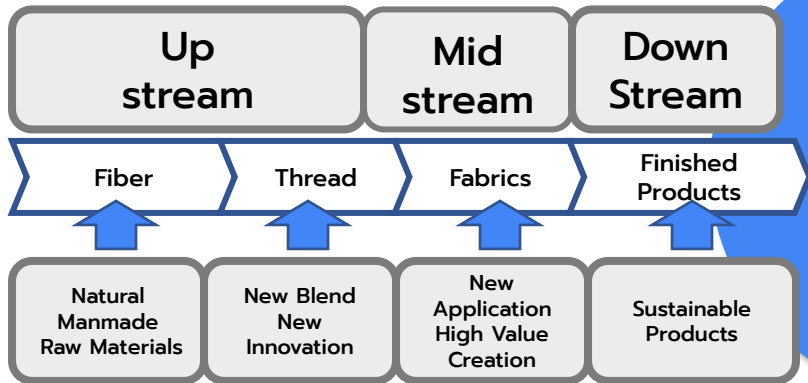


Sustainable Society

- Green Energy
- **Low Carbon**
- Green Chemical
- **High Technology**
- Circular fashion



## Textile Industry



Sustainable Materials



Sustainable Consumption







The Thai government through the **Ministry of Industry** started to use the concept of sustainable industrial development as part of the determination of the guideline of the country's industrial development to ensure environmental-friendly production via the Project of Green Industry in 2011 and has been implemented ever since. The Project focuses on the promotion of industrial establishments, industrial plants, and mining establishments in Thailand to continuously improve and change production process to ensure environmental-friendly production. Moreover, it also provides assistance and stimulates the development and the upgrading of environmental management, safety, and energy conservation.

Source : Department of Industrial Works, Ministry of Industry (Thailand)

# 5 levels

of development towards  
the **Green Industry**

**Green Commitment**

**Green Activity**

**Green System**

**Green Culture**

**Green Network**

# Alternative Fiber



UP STREAM  
TECHNOLOGY



**Hemp fiber**

**Water hyacinth fiber**



**Sugar cane leaves fiber**



**Pineapple fiber**



# Green Chemical

The textile industry uses over 8,000 types of chemicals and dyes.



Some types are harmful to humans and animals.



Some types are accumulated in nature and generate pollution.



The innovation of dyeing with natural dyes for uniform mercerization and durable dyes such as indigo, lac, Garcinia dulcis, Burma padauk, etc. is undertaken to reduce the use of harmful dyes and chemicals.



# Eco-Design



Environmental-friendly design can find the solution of design with the lowest impact possible on the environment during the life cycle of a product with four design strategies:

- 🔄 Design with the least waste such as zero waste
- 🔄 Design for the materials and the processes with low environment impact such as fabric made from the environmental-friendly process
- 🔄 Design for long life span such as selection of material that is durable and easy to repair
- 🔄 Design for recycling such as reduction of components for easy separation, use of fabric made from one material

# Green Energy

GREEN  
TECHNOLOGY

Green energy or clean energy is the energy or the source of energy which comes from raw materials that are not fossil fuel. It is alternative energy that does not generate harmful pollution, unlike others. The energy includes solar energy, wind energy, biomass, and hydro energy.



# Eco label

It is one of the requirements of the trading partners to demonstrate that the product is the **Green Product**



**Global Organic Textile Standard (GOTS)**

**GOTS** was founded by four well-reputed organisations: Organic Trade Association (OTA, USA), Internationaler Verband der Naturtextilwirtschaft (IVN, Germany), The Soil Association (UK) and Japan Organic Cotton Association (JOCA, Japan). Two of these (IVN and JOCA) are textile industry organisations, while the other two (OTA and Soil Association) are organic organisations rooted in organic agriculture and food.



**Oeko-Tex Standard 100**

**OEKO-TEX®** consists of independent textile and leather testing institutes in Europe and Japan. The organization was founded in 1992 with the aim of using laboratory tests to ensure textile products are harmless to human health.



**Global Recycled Standard (GRS)**

The Recycled Claim Standard (RCS) and **Global Recycled Standard (GRS)** set the criteria for third-party certification of recycled materials and chain of custody. The GRS includes a higher (50%) minimum recycled content percentage and additional social and environmental requirements related to processing and chemical use.

# Thank you...

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