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**Prepared By:** Maysa Chanikornpradit, Agricultural Specialist

**Approved By:** Russell Nicely

**Report Highlights:**

MY2020/21 cotton imports are expected to grow at a slow pace in anticipation of weak or no economic recovery. MY2019/20 cotton imports reduce sharply due to an economic downturn caused by the COVID-19 outbreak in 2020. Imports of U.S. cotton are expected to decline significantly in MY2019/20

## **Executive Summary**

MY2020/21 cotton imports are forecast to increase to approximately 980,000 bales, up 3 percent from MY2019/20 due to a marginal increase in cotton and cotton-blended yarn production. This is in line with forecasted textile production, which is expected to experience limited growth due to an economic downturn in 2020 - 2021. Imports of U.S. cotton are expected to increase to around 520,000 bales as competitive spinning mills rely on high-quality cotton from the United States for their medium and fine count yarn production and shifted demand from China to Thailand for textile and garment production due to supply chain disruption from COVID-19 outbreaks.

MY2019/20 cotton imports are expected to decrease 11 percent from MY2018/19. In the first half of MY2019/20, the cotton imports decreased 25 percent from the same period last year. Spinners are concerned about a possible global economic downturn, which will affect textile exports in 2020 and 2021.

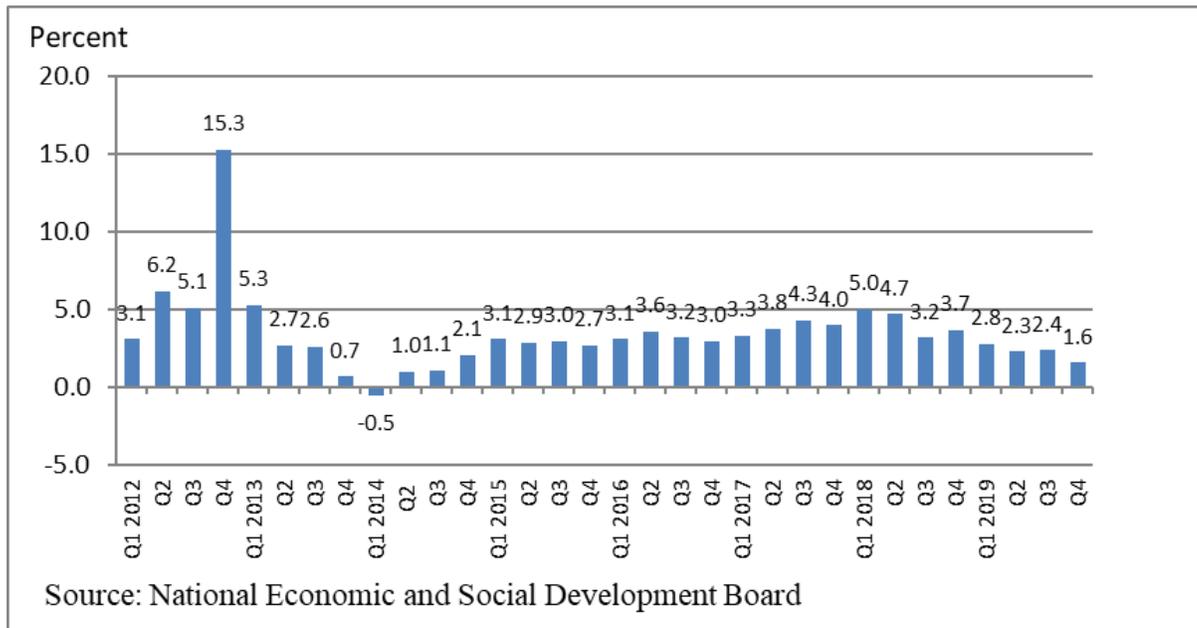
### **1. Production**

Cotton production remains marginal in Thailand totaling approximately 1,500 – 1,600 metric tons (2,300 – 2,500 bales) due to unattractive returns compared to other field crops like corn. This production accounts for less than one percent of total demand. The government does not provide any incentives for farmers to produce cotton. Also, the government bans domestic production of all transgenic (biotech) plant varieties, including cotton.

### **2. Consumption**

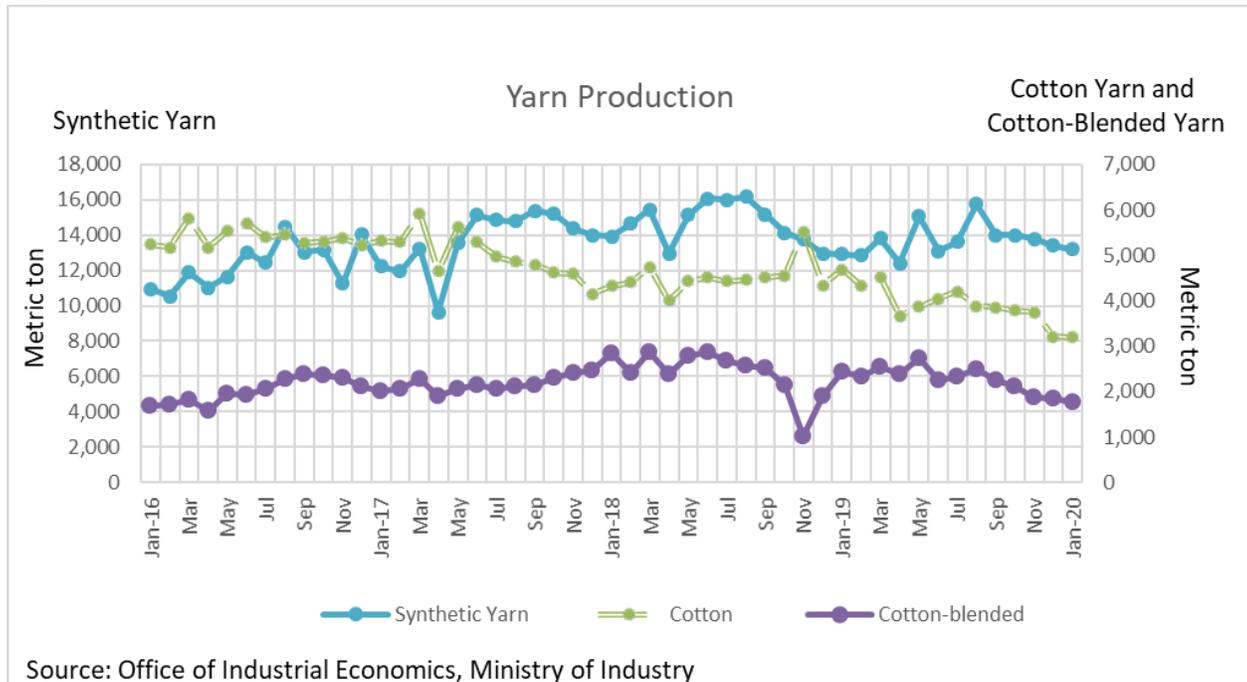
MY2020/21 cotton consumption is forecast to increase to 985,000 bales, up 2 percent from MY2019/20. This slow growth pace is primarily due to an expected economic downturn in 2020 - 2021. Spinners do expect to run down their cotton yarn inventories in MY2019/20 due to growing exports of textile and garment products to Japan, the United States, and Europe, which were affected by a supply chain disruption caused by the COVID-19 outbreak in China in MY2019/20. Spinners are holding high inventories of cotton yarn, up approximately 32 percent in the first half of MY2019/20, comparing to the same period in MY2018/19. According to the recent official economic forecast by the Bank of Thailand, Thai economic growth in 2020 is revised down to a negative 5.3 percent from the previous forecast of 1.5 – 2.5 percent due to the significant reduction in the numbers of tourists as a result of the COVID-19 outbreak. Tourism accounts for approximately 20 percent of Thailand's economic growth. The Thai Tourism and Sports Ministry expects the numbers of tourists to decline by 50 percent in the first half of 2020, particularly from China, which accounts for around one third of total tourists in Thailand. Also, Thai economic growth in 2019 is lower than expected at 2.4 percent. The decrease from the 4.2 percent economic growth seen in 2018 is mainly due to reduced export growth, which declined 3.2 percent in 2019, particularly in the last quarter of 2019, compared to 7.5 percent in 2018 (Figure 2.1).

**Figure 2.1: Thai Economic Growth**

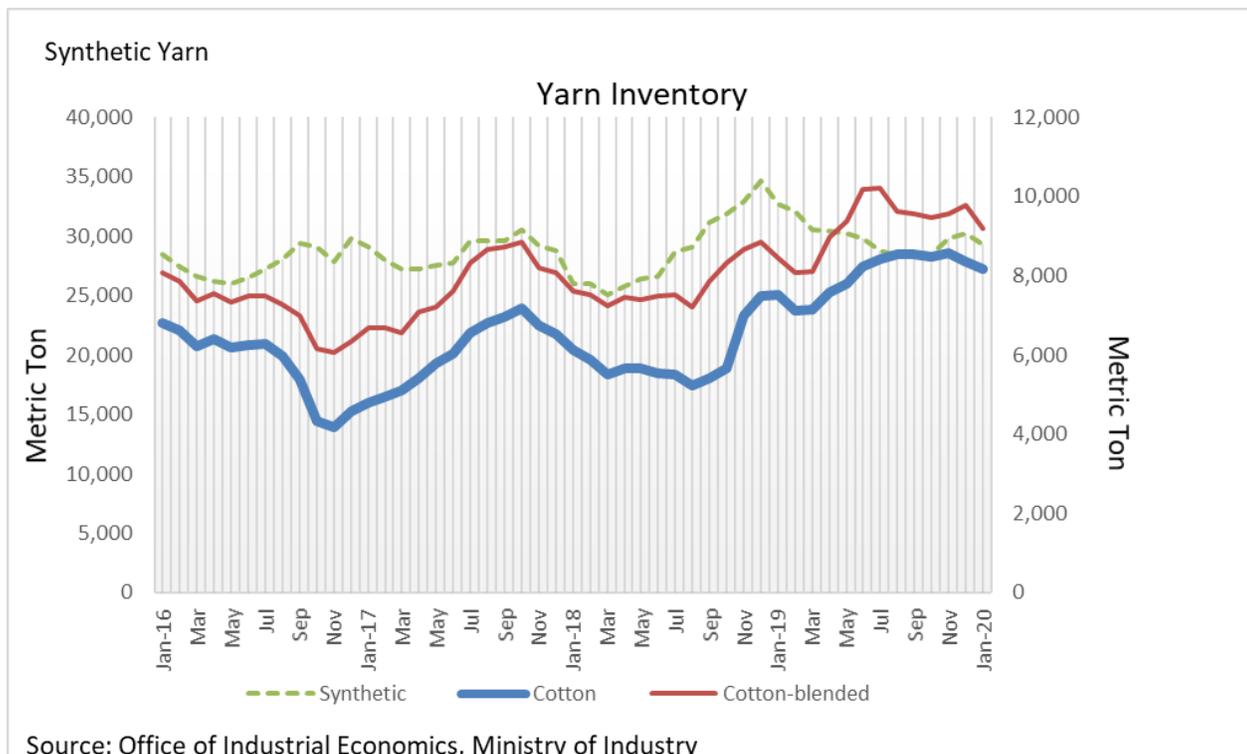


In the first half of MY2019/20, total cotton yarn production decreased 16 percent from the same period last year (Figure 2.2). The decreased cotton yarn production reflected a reduction in cotton and cotton-blended fabric production, which declined by 18 and 14 percent respectively, due to competition from imported fabric, especially from India and China. According to the Ministry of Industry’s Department of Industrial works, seven spinning mills and thirty garment factories closed in 2019, causing 6,646 workers to lose their jobs due to higher labor costs than neighboring countries. Spinning mills and garment and textile factories have been attempting to replace manpower with machinery due to increased labor costs and difficulties in finding Thai laborers (40 percent of the textile industry workforce are migrant workers).

**Figure 2.2: Yarn Production**

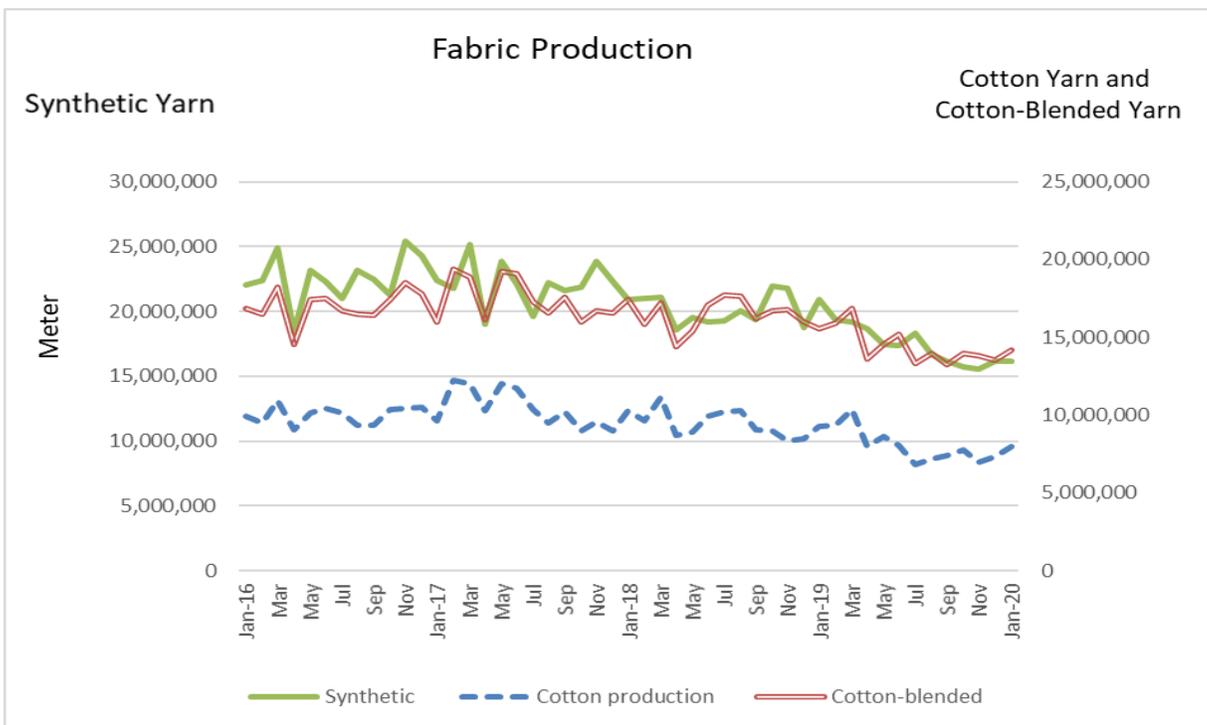


**Figure 2.3: Yarn Inventory Index**



While cotton yarn production in the first half of MY2019/20 declined, the inventory of cotton yarn increased up to 32 percent comparing to same period last year (Figure 2.3). Cotton and cotton-blended yarn production accounts for approximately 35-40 percent of total yarn production. In the first half of MY2019/20, synthetic yarn production, which accounts for approximately 60-65 percent of total yarn production, declined 1 percent from the same period last year due to reduced man-made fabric production, which declined around 21 percent (Figure 2.4). Additionally, garment production decreased 7 percent, while garment inventory increased 2 percent in the first half of MY2018/19 leading to decreased demand for imported fabric, particularly for both cotton and synthetic fabric from India and Vietnam.

**Figure 2.4: Fabric and Garment Production Index**



MY2019/20 cotton consumption forecast remains unchanged at 945,000 bales, which is likely to decline by 10 percent from MY2018/19 ([TH2019-0124: Cotton and Products Update, November 2019](#)). Cotton spinners will be cautious in building up cotton yarn stocks in the second half of MY2019/20 due to concerns about global economic growth in 2020, which will affect domestic textile production, particularly for export-oriented textile products. Additionally, many cotton spinners have shifted to a cotton-blended yarn production, which is more competitive in the yarn market. Prices of cotton-blended yarn is reportedly 20-30 percent cheaper than cotton yarn.

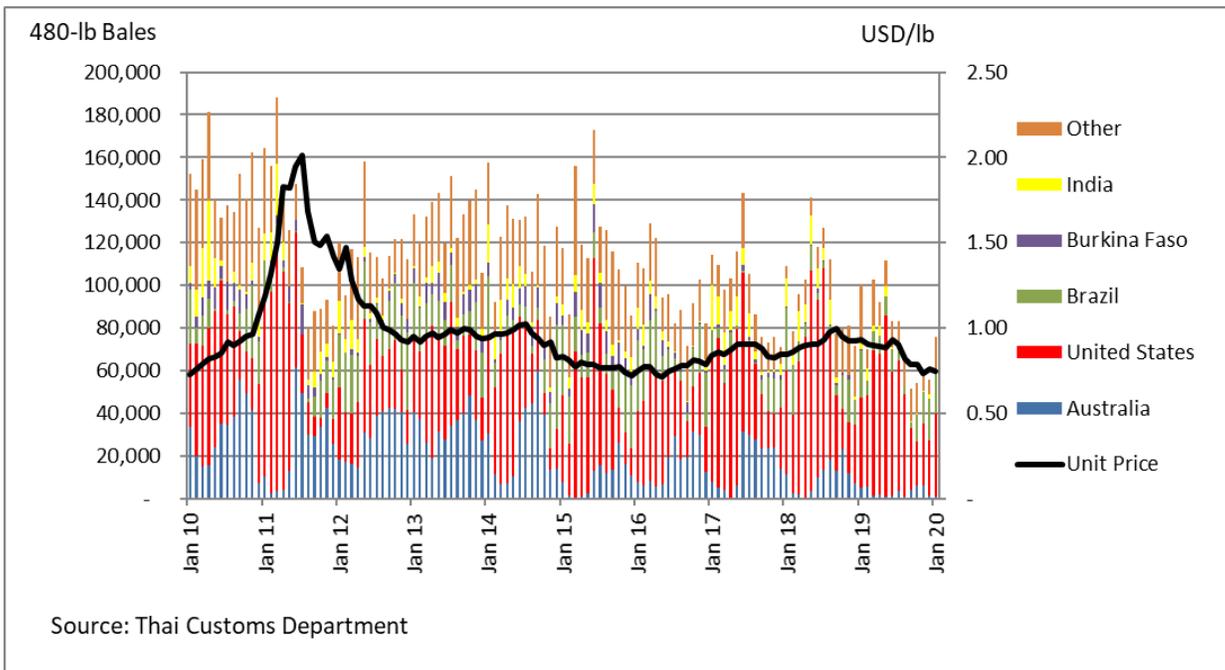
### 3. Trade

MY2020/21 cotton imports are forecast to increase to around 980,000 bales, up 3 percent from MY2019/20 in anticipation of minimal increases in cotton and cotton-blended yarn production. Import demand for U.S. cotton is expected to increase to 520,000 bales, up approximately 2 percent from MY2019/20, as medium-scale spinning mills continue to diversify their cotton yarn production from coarse-count yarn to medium and fine-count yarn as locally produced coarse-count yarn cannot compete with imported yarn. Spinning mills typically rely on high-quality cotton from the United States for fine-count yarn production.

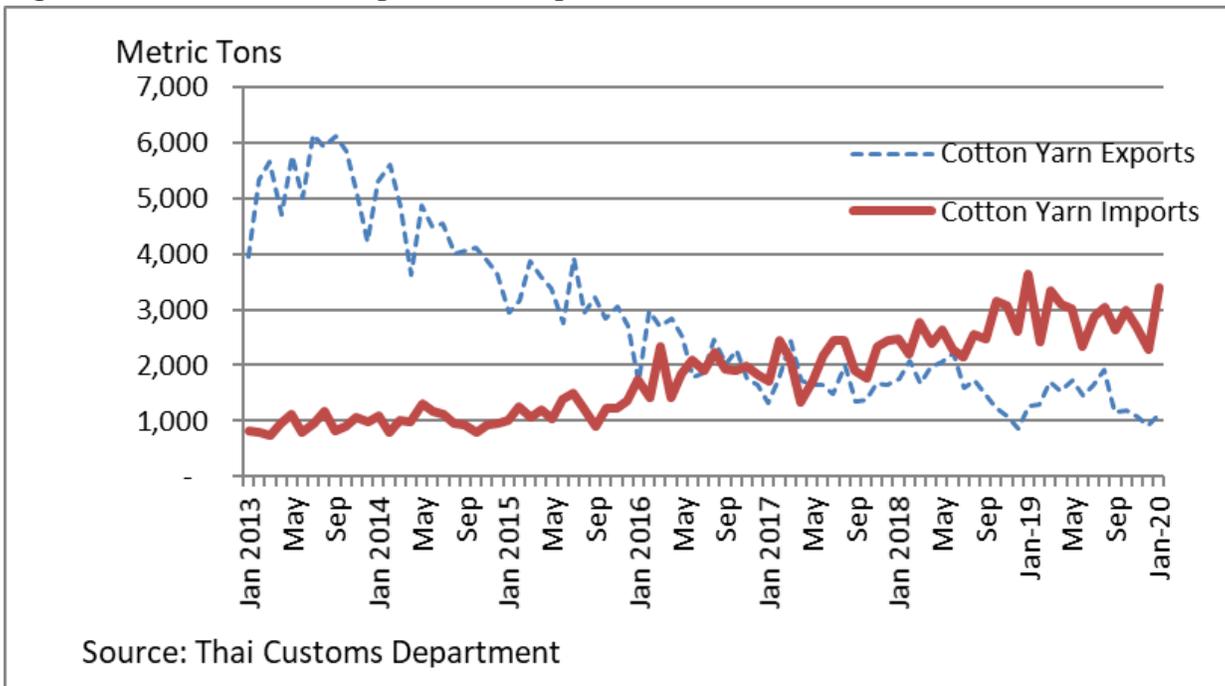
In the first half of MY2019/20, cotton imports totaled 363,950 bales, down 30 percent from the same period in MY2018/19 (Figure 3.1 and Table 2). Imports of U.S. cotton declined to 190,024 bales, down 8 percent from the same period last year due to high inventory of cotton yarn. Thailand has been a net importer of cotton yarn since MY2016/17 as many cotton fabric manufacturers increasingly use imported cotton yarn for their domestic-oriented production. Despite increased demand for Vietnamese cotton yarn in the first half of MY2019/20, total cotton yarn imports decreased by 2.5 percent mainly from India and Japan, which decreased by 22 and 42 percent respectively (Figure 3.2 and Table 3) due to reduced fabric production. In the first half of MY2019/20, cotton yarn imports from Vietnam increased by 33 percent from the same period in MY2018/19 as imported Vietnamese cotton yarn was 10 percent cheaper than locally produced yarn. Exports of cotton yarn in the first half of MY2019/20 continued to decline by 3 percent from the same period last year. The decline was due mainly to the strengthening of the Thai baht to a six-year record at 31.04 Baht/U.S. \$1.00 in 2019 (compared to the previous year's exchange rate of 32.31 Baht/U.S. \$1.00), which made Thai cotton yarn less competitive.

Imports of cotton fabric in the first half of MY2019/20 increased 9 percent from the same period last year as garment manufacturers reportedly shifted to relatively cheaper imported fabric, mainly from China and India (Figure 3.3 and Table 5 and 6). Additionally, import demand for cotton fabric is expected to remain strong in the second half of MY2019/20 due to the COVID-19 outbreak, which caused a disruption in the supply chain of the garment and textile industries in China, as well as the adverse impact of the trade war that imposed higher U.S. import duties on Chinese textile products in 2019. Thai textile manufacturers saw a shift of the demand for Chinese garment and textile products to Thailand that benefited the Thai garment and textile industry. As a result, import demand for fabric trended upward, particularly from India, Korea and Taiwan, for garment and textile production.

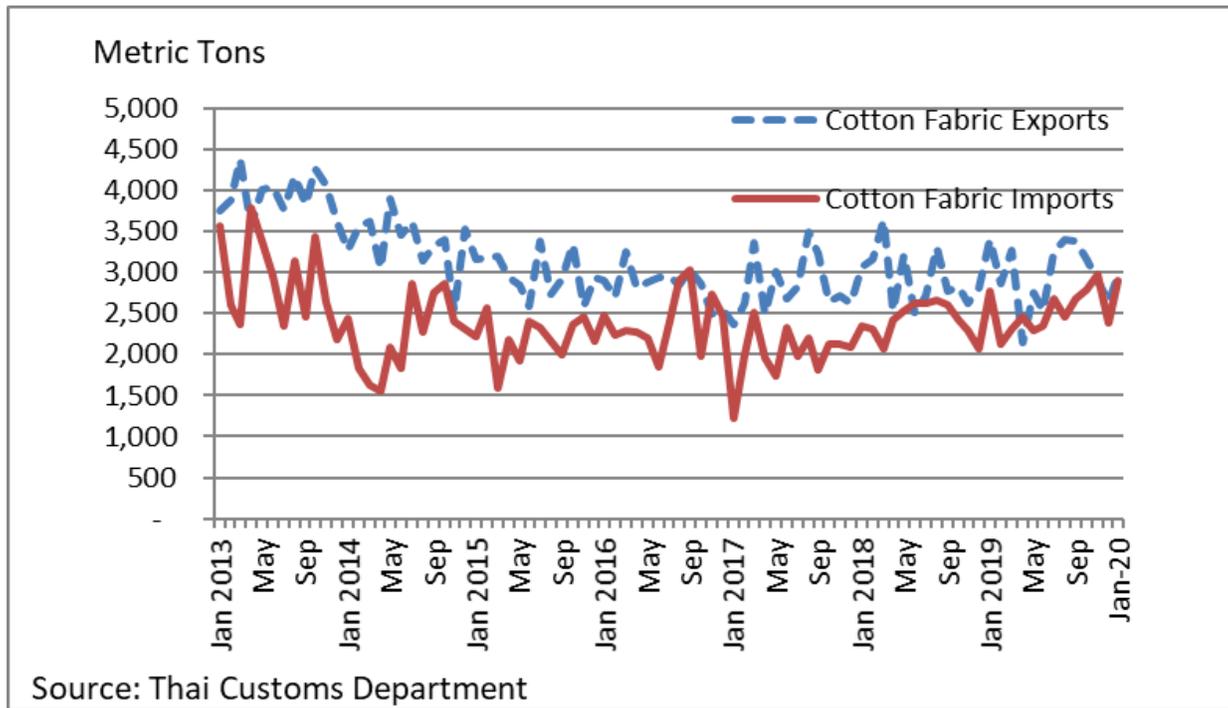
**Figure 3.1: Thailand's Imports of Raw Cotton and Average Import Prices**



**Figure 3.2: Cotton Yarn Exports and Imports**



**Figure 3.3: Cotton Fabric Exports and Imports**



Post’s forecast for MY2019/20 cotton imports remains at 950,000 bales, which is 12 percent lower than MY2018/19 due to the domestic and global economic downturn in 2020 and 2021. Import prices of raw cotton remain unattractive for spinners to build up raw cotton stocks due to current high inventory of cotton yarn despite a 19 percent drop in import prices in the first half of MY2019/20. Import demand for U.S. cotton is expected to decline to 510,000 bales, down approximately 13 percent from MY2018/19.

**4. Stocks**

MY2019/20 and MY2020/21 cotton stocks are expected to remain at minimum levels of 2-3 months of use. Spinning mills are likely to be cautious about building up stocks of cotton, particularly in the second half of MY2019/20, due to concerns about sluggish economic growth mainly caused by the COVID-19 outbreak that affected both domestic and export markets in 2019 and 2020.

## Appendix Table

**Table 1: Thailand's Cotton Production, Supply and Demand**

| Cotton                                            | 2018/2019     |             | 2019/2020     |             | 2020/2021     |             |
|---------------------------------------------------|---------------|-------------|---------------|-------------|---------------|-------------|
|                                                   | Aug 2018      |             | Aug 2019      |             | Aug 2020      |             |
| Thailand                                          | USDA Official | New Post    | USDA Official | New Post    | USDA Official | New Post    |
| Area Planted                                      | 0             | 1           | 0             | 1           | 0             | 1           |
| Area Harvested                                    | 1             | 1           | 1             | 1           | 0             | 1           |
| Beginning Stocks                                  | 201           | 201         | 177           | 228         | 0             | 209         |
| Production                                        | 2             | 2           | 2             | 2           | 0             | 2           |
| Imports                                           | 1075          | 1075        | 950           | 950         | 0             | 980         |
| MY Imports from U.S.                              | 0             | 589         | 0             | 510         | 0             | 520         |
| <b>Total Supply</b>                               | <b>1278</b>   | <b>1278</b> | <b>1129</b>   | <b>1180</b> | <b>0</b>      | <b>1191</b> |
| Exports                                           | 1             | 0           | 0             | 1           | 0             | 0           |
| Use                                               | 1075          | 1050        | 950           | 945         | 0             | 960         |
| Loss                                              | 25            | 0           | 25            | 25          | 0             | 25          |
| <b>Total Dom. Cons.</b>                           | <b>1100</b>   | <b>1050</b> | <b>975</b>    | <b>970</b>  | <b>0</b>      | <b>985</b>  |
| Ending Stocks                                     | 177           | 228         | 154           | 209         | 0             | 206         |
| <b>Total Distribution</b>                         | <b>1278</b>   | <b>1278</b> | <b>1129</b>   | <b>1180</b> | <b>0</b>      | <b>1191</b> |
| Stock to Use %                                    | 16.45         | 21.71       | 16.21         | 22.09       | 0             | 21.46       |
| Yield                                             | 435           | 435         | 435           | 435         | 0             | 435         |
|                                                   |               |             |               |             |               |             |
| (1000 HA) ,1000 480 lb. Bales ,(PERCENT) ,(KG/HA) |               |             |               |             |               |             |

**Table 2: Thailand's Imports of Raw Cotton**

| Marketing Year<br>(August/July) | MY2015/16        | MY2016/17        | MY2017/18        | MY2018/19        | August - January |                |              |
|---------------------------------|------------------|------------------|------------------|------------------|------------------|----------------|--------------|
|                                 |                  |                  |                  |                  | MY2018/19        | MY2019/20      | %change      |
| <b>Unit: 480-lb Bales</b>       |                  |                  |                  |                  |                  |                |              |
| United States                   | 424,113          | 564,806          | 627,254          | 588,624          | 207,355          | 190,024        | -8.4         |
| Brazil                          | 233,993          | 110,488          | 138,559          | 125,209          | 77,282           | 73,240         | -5.2         |
| Australia                       | 162,152          | 195,539          | 156,121          | 94,066           | 79,273           | 19,964         | -74.8        |
| Greece                          | 8,515            | 12,568           | 6,658            | 18,761           | 9,712            | 6,196          | -36.2        |
| Tanzania                        | 7,390            | 10,771           | 10,626           | 28,431           | 25,204           | 5,033          | -80.0        |
| Argentina                       | 13,670           | 19,507           | 1,607            | 43,215           | 32,821           | 12,121         | -63.1        |
| Mali                            | 107,453          | 95,206           | 49,364           | 37,102           | 18,794           | 23,439         | 24.7         |
| India                           | 60,925           | 99,223           | 82,067           | 38,593           | 18,885           | 5,231          | -72.3        |
| Spain                           | 3,809            | 962              | 2,515            | 20,580           | 15,375           | 5,428          | -64.7        |
| Cote d Ivoire                   | 60,474           | 29,539           | 8,650            | 20,685           | 13,340           | 4,173          | -68.7        |
| Turkey                          | 814              | 3,899            | 413              | 6,598            | 2,913            | 706            | -75.8        |
| Togo                            | 10,620           | 1,401            | 3,335            | 3,711            | 1,652            | 2,282          | 38.1         |
| South Africa                    | 923              | 373              | -                | 5,806            | 924              | 465            | -            |
| Other                           | 179,964          | 81,503           | 61,708           | 44,094           | 18,268           | 15,648         | -14.3        |
| <b>World</b>                    | <b>1,274,815</b> | <b>1,225,785</b> | <b>1,148,877</b> | <b>1,075,475</b> | <b>521,798</b>   | <b>363,950</b> | <b>-30.3</b> |

Source: Thai Customs Department

| Calendar Year             | 2016             | 2017             | 2018             | 2019           | % Change     | January        |               |              |
|---------------------------|------------------|------------------|------------------|----------------|--------------|----------------|---------------|--------------|
|                           |                  |                  |                  |                |              | 2019           | 2020          | %Change      |
| <b>Unit: 480-lb Bales</b> |                  |                  |                  |                |              |                |               |              |
| United States             | 421,051          | 562,347          | 670,072          | 574,452        | -14.3        | 42,192         | 39,034        | -7.5         |
| Brazil                    | 212,788          | 88,708           | 141,061          | 124,848        | -11.5        | 22,153         | 18,473        | -16.6        |
| Australia                 | 195,023          | 197,180          | 116,850          | 39,180         | -66.5        | 5,210          | 789           | -84.9        |
| Greece                    | 10,849           | 9,895            | 7,681            | 18,157         | 136.4        | 4,986          | 2,072         | -58.4        |
| Tanzania                  | 16,471           | 8,988            | 22,109           | 11,305         | -48.9        | 4,733          | 1,687         | -            |
| Argentina                 | 13,746           | 10,263           | 28,828           | 20,960         | -27.3        | 4,218          | 5,773         | -            |
| Mali                      | 90,993           | 85,566           | 40,111           | 44,083         | 9.9          | 3,720          | 1,383         | -62.8        |
| India                     | 46,005           | 104,494          | 84,976           | 26,813         | -68.4        | 3,525          | 1,654         | -53.1        |
| Spain                     | 3,972            | 2,515            | 12,932           | 10,380         | -19.7        | 2,443          | 2,770         | -            |
| Cote d Ivoire             | 43,109           | 18,375           | 16,492           | 13,173         | -20.1        | 1,656          | -             | -            |
| Turkey                    | 1,495            | 2,914            | 2,201            | 5,220          | 137.1        | 1,023          | 194           | -            |
| Togo                      | 5,211            | 2,183            | 1,851            | 5,294          | 186.0        | 953            | -             | -            |
| South Africa              | 373              | -                | -                | 6,271          | -            | 924            | -             | -            |
| Other                     | 117,735          | 76,352           | 43,994           | 42,066         | -4.4         | 2,596          | 1,925         | -25.9        |
| <b>World</b>              | <b>1,178,820</b> | <b>1,169,781</b> | <b>1,189,159</b> | <b>942,202</b> | <b>-20.8</b> | <b>100,331</b> | <b>75,754</b> | <b>-24.5</b> |

Source: Thai Customs Department

**Table 3: Thailand's Imports of Cotton Yarn**

| Marketing Year<br>(August/July) | MY2015/16     | MY2016/17     | MY2017/18     | MY2018/19     | August - January |               |             |
|---------------------------------|---------------|---------------|---------------|---------------|------------------|---------------|-------------|
|                                 |               |               |               |               | MY2018/19        | MY2019/20     | %change     |
| India                           | 8,811         | 12,012        | 12,529        | 18,460        | 9,961            | 7,750         | -22.2       |
| Vietnam                         | 3,112         | 4,189         | 6,809         | 9,254         | 4,373            | 5,830         | 33.3        |
| China                           | 3,894         | 4,191         | 3,673         | 3,410         | 1,796            | 1,848         | 2.9         |
| Japan                           | 1,745         | 1,641         | 2,711         | 2,104         | 999              | 576           | -42.3       |
| Indonesia                       | 77            | 190           | 626           | 356           | 103              | 819           | 695.1       |
| Korea South                     | 158           | 401           | 834           | 454           | 122              | 7             | -94.3       |
| Malaysia                        | 50            | 201           | 0             | 294           | 20               | 97            | -           |
| Taiwan                          | 130           | 71            | 40            | 42            | 13               | 4             | -69.2       |
| Italy                           | 13            | 14            | 18            | 19            | 17               | 22            | -           |
| Pakistan                        | 644           | 314           | 218           | 133           | 64               | 25            | -60.9       |
| Germany                         | 4             | 1             | 1             | 2             | 1                | 2             | 100.0       |
| United States                   | 0             | 1             | 2             | 2             | 2                | -             | -           |
| Hong Kong                       | 18            | 10            | 25            | 28            | 22               | 4             | -81.8       |
| Other                           | 80            | 568           | 356           | 35            | 13               | -             | -100.0      |
| <b>World</b>                    | <b>18,736</b> | <b>23,803</b> | <b>27,844</b> | <b>34,593</b> | <b>17,506</b>    | <b>17,078</b> | <b>-2.4</b> |

Source: Thai Customs Department

| Calendar Year | 2016          | 2017          | 2018          | 2019          | %Change     | January      |              |             |
|---------------|---------------|---------------|---------------|---------------|-------------|--------------|--------------|-------------|
|               |               |               |               |               |             | 2019         | 2020         | %change     |
| India         | 11,135        | 11,206        | 16,324        | 16,981        | 45.7        | 1,862        | 1,130        | -39.3       |
| Vietnam       | 3,923         | 4,988         | 7,517         | 10,417        | 50.7        | 1,121        | 1,415        | 26.2        |
| China         | 4,784         | 3,575         | 3,713         | 3,235         | 3.8         | 258          | 486          | 88.5        |
| Japan         | 1,609         | 2,560         | 2,204         | 1,789         | -13.9       | 249          | 140          | -43.8       |
| Indonesia     | 141           | 345           | 403           | 1,023         | 16.7        | 60           | 109          | 80.3        |
| Korea South   | 176           | 918           | 301           | 394           | -67.3       | 55           | -            | -100.0      |
| Malaysia      | 200           | 8             | 0             | 332           | -99.1       | 20           | 58           | 190.0       |
| Taiwan        | 140           | 67            | 23            | 39            | -65.1       | 8            | 1            | -87.9       |
| Italy         | 14            | 13            | 21            | 19            | 59.1        | 3            | 7            | 121.7       |
| Pakistan      | 420           | 306           | 189           | 94            | -38.2       | 1            | -            | -100.0      |
| Germany       | 2             | 1             | 1             | 2             | -0.1        | 1            | -            | -100.0      |
| United States | 0             | 2             | 2             | 1             | -18.2       | 1            | -            | -           |
| Hong Kong     | 8             | 26            | 27            | 9             | 1.1         | 1            | 1            | -           |
| Other         | 109           | 835           | 54            | 67            | -93.5       | 0            | 57           | -           |
| <b>World</b>  | <b>22,660</b> | <b>24,852</b> | <b>30,779</b> | <b>34,402</b> | <b>23.8</b> | <b>3,640</b> | <b>3,404</b> | <b>-6.5</b> |

Source: Thai Customs Department

**Table 4: Thailand's Exports of Cotton Yarn**

| Marketing Year<br>(August/July) | MY2015/16     | MY2016/17     | MY2017/18     | MY2018/19     | August - January  |              |             |
|---------------------------------|---------------|---------------|---------------|---------------|-------------------|--------------|-------------|
|                                 |               |               |               |               | Unit: Metric Tons | MY2018/19    | MY2019/20   |
| China                           | 18,694        | 12,222        | 10,489        | 7,450         | 2,921             | 2,799        | -4.2        |
| Korea South                     | 5,041         | 3,724         | 4,947         | 4,134         | 1,913             | 1,979        | 3.5         |
| Japan                           | 4,155         | 4,137         | 3,102         | 2,904         | 1,488             | 1,656        | 11.3        |
| Indonesia                       | 55            | 15            | 500           | 600           | 322               | 236          | -26.7       |
| Egypt                           | 32            | 7             | 48            | 26            | 26                | -            | -           |
| Italy                           | 132           | 184           | 249           | 156           | 86                | -            | -100.0      |
| Vietnam                         | 747           | 283           | 194           | 285           | 144               | 226          | 56.9        |
| Cambodia                        | 0             | 1             | 0             | 61            | 16                | 7            | -           |
| Guinea                          | 78            | 70            | 40            | 30            | 18                | -            | -           |
| Australia                       | 10            | 10            | 20            | 14            | 13                | 8            | -           |
| Hong Kong                       | 774           | 266           | 162           | 45            | 25                | 25           | 0.0         |
| Laos                            | 28            | 44            | 46            | 37            | 19                | 25           | 31.6        |
| Bangladesh                      | 165           | 180           | 1,122         | 575           | 387               | 5            | -98.7       |
| Other                           | 1,251         | 1,031         | 497           | 666           | 257               | 411          | 59.9        |
| <b>World</b>                    | <b>31,163</b> | <b>22,173</b> | <b>21,416</b> | <b>16,983</b> | <b>7,635</b>      | <b>7,377</b> | <b>-3.4</b> |

Source: Thai Customs Department

| Calendar Year | 2016          | 2017          | 2018          | 2019          | % Change    | January           |              |              |
|---------------|---------------|---------------|---------------|---------------|-------------|-------------------|--------------|--------------|
|               |               |               |               |               |             | Unit: Metric Tons | 2019         | 2020         |
| China         | 14,963        | 11,491        | 8,396         | 7,396         | -26.9       | 443               | 375          | -15.4        |
| Korea South   | 4,913         | 3,421         | 4,827         | 4,313         | 41.1        | 418               | 306          | -26.8        |
| Japan         | 4,006         | 3,488         | 3,142         | 3,087         | -9.9        | 233               | 217          | -6.7         |
| Indonesia     | 9             | 63            | 713           | 513           | 1032.3      | 57                | 58           | 1.3          |
| Egypt         | 14            | 19            | 36            | -             | 84.9        | 26                | -            | -100.0       |
| Italy         | 93            | 188           | 259           | 155           | 37.5        | 22                | -            | -100.0       |
| Vietnam       | 660           | 215           | 218           | 324           | 1.1         | 16                | 59           | 258.8        |
| Cambodia      | 0             | 1             | 1             | 86            | 106.6       | 15                | 7            | -            |
| Guinea        | 78            | 55            | 29            | -             | -46.8       | 7                 | -            | -            |
| Australia     | 6             | 21            | 18            | 13            | -13.3       | 4                 | 8            | -            |
| Hong Kong     | 268           | 144           | 129           | 46            | -10.4       | 4                 | 25           | 569.2        |
| Laos          | 38            | 48            | 41            | 43            | -16.3       | 4                 | 25           | 585.9        |
| Bangladesh    | 133           | 226           | 1,407         | 197           | 521.5       | 3                 | 5            | 48.0         |
| Other         | 1,347         | 710           | 557           | 709           | -21.6       | 4                 | 13           | 224.7        |
| <b>World</b>  | <b>26,527</b> | <b>20,093</b> | <b>19,772</b> | <b>16,882</b> | <b>-1.6</b> | <b>1,256</b>      | <b>1,098</b> | <b>-12.6</b> |

Source: Thai Customs Department

**Table 5: Thailand's Imports of Cotton Fabric**

| Marketing Year<br>(August/July) | MY2015/16     | MY2016/17     | MY2017/18     | MY2018/19     | August - January |               |            |
|---------------------------------|---------------|---------------|---------------|---------------|------------------|---------------|------------|
|                                 |               |               |               |               | MY2018/19        | MY2019/20     | %change    |
| China                           | 19,451        | 20,748        | 17,706        | 15,863        | 7,962            | 9,122         | 14.6       |
| India                           | 3,741         | 4,222         | 7,665         | 10,844        | 5,535            | 6,095         | 10.1       |
| Indonesia                       | 706           | 227           | 188           | 374           | 220              | 218           | -0.9       |
| Japan                           | 524           | 434           | 423           | 394           | 239              | 176           | -26.4      |
| Egypt                           | 1             | 3             | 29            | 103           | 84               | 35            | -58.3      |
| Italy                           | 72            | 96            | 97            | 133           | 70               | 72            | 2.9        |
| Taiwan                          | 193           | 160           | 225           | 118           | 74               | 36            | -51.4      |
| Pakistan                        | 1,230         | 298           | 307           | 394           | 176              | 60            | -65.9      |
| Korea South                     | 59            | 65            | 60            | 105           | 66               | 62            | -6.1       |
| Portugal                        | 4             | 9             | 33            | 32            | 23               | 11            | 85.0       |
| Vietnam                         | 118           | 72            | 60            | 320           | 174              | 142           | -18.4      |
| Laos                            | 31            | 13            | 13            | 19            | 9                | 21            | 133.3      |
| United Kingdom                  | 37            | 33            | 21            | 16            | 8                | 4             | -50.0      |
| Other                           | 713           | 449           | 425           | 275           | 161              | 103           | -36.0      |
| <b>World</b>                    | <b>26,881</b> | <b>26,828</b> | <b>27,253</b> | <b>28,990</b> | <b>14,801</b>    | <b>16,157</b> | <b>9.2</b> |

Source: Thai Customs Department

| Calendar Year  | 2015          | 2016          | 2017          | 2018          | 2019          | % Change    | January      |              |            |
|----------------|---------------|---------------|---------------|---------------|---------------|-------------|--------------|--------------|------------|
|                |               |               |               |               |               |             | 2019         | 2020         | %Change    |
| China          | 19,947        | 21,524        | 17,711        | 16,693        | 17,032        | -5.7        | 1,595        | 1,586        | -0.6       |
| India          | 2,244         | 4,456         | 4,469         | 10,063        | 11,283        | 125.2       | 995          | 1,117        | 12.2       |
| Indonesia      | 593           | 555           | 181           | 295           | 372           | 62.6        | 42           | 42           | 1.0        |
| Japan          | 603           | 478           | 432           | 430           | 331           | -0.5        | 36           | 36           | 0.5        |
| Egypt          | 0             | 4             | 9             | 74            | 73            | 753.0       | 31           | 12           | -          |
| Italy          | 79            | 76            | 105           | 95            | 132           | -9.8        | 23           | 23           | 0.0        |
| Taiwan         | 171           | 186           | 179           | 190           | 81            | 6.0         | 20           | 19           | -4.5       |
| Pakistan       | 1,858         | 656           | 320           | 390           | 287           | 21.8        | 10           | 1            | -90.4      |
| Korea South    | 52            | 53            | 65            | 97            | 87            | 49.1        | 6            | 21           | 224.9      |
| Portugal       | 3             | 3             | 21            | 41            | 22            | 98.0        | 3            | 1            | -65.2      |
| Vietnam        | 139           | 102           | 86            | 190           | 276           | 121.2       | 3            | 14           | 388.5      |
| Laos           | 35            | 25            | 10            | 16            | 30            | 63.6        | 2            | 4            | 95.6       |
| United Kingdom | 29            | 38            | 20            | 21            | 13            | 8.6         | 1            | 1            | -14.6      |
| Other          | 589           | 668           | 460           | 361           | 206           | -21.6       | 5            | 16           | 237.4      |
| <b>World</b>   | <b>26,342</b> | <b>28,822</b> | <b>24,067</b> | <b>28,956</b> | <b>30,225</b> | <b>20.3</b> | <b>2,772</b> | <b>2,893</b> | <b>4.4</b> |

Source: Thai Customs Department

**Table 6: Thailand's Exports of Cotton Fabric**

| Marketing Year<br>(August/July) | MY2015/16     | MY2016/17     | MY2017/18     | MY2018/19     | August - January |               |            |
|---------------------------------|---------------|---------------|---------------|---------------|------------------|---------------|------------|
|                                 |               |               |               |               | MY2018/19        | MY2019/20     | %change    |
| Myanmar                         | 8,166         | 7,098         | 7,833         | 2,182         | 4,247            | 4,571         | 7.6        |
| Bangladesh                      | 5,310         | 5,412         | 6,829         | 4,280         | 2,457            | 3,179         | 29.4       |
| Japan                           | 4,491         | 3,667         | 2,453         | 2,027         | 1,042            | 1,074         | 3.1        |
| China                           | 388           | 205           | 999           | 2,340         | 887              | 1,408         | 58.7       |
| Indonesia                       | 550           | 489           | 608           | 1,671         | 900              | 653           | -27.4      |
| Korea South                     | 823           | 863           | 1,012         | 1,292         | 659              | 721           | 9.4        |
| India                           | 17            | 73            | 34            | 1,761         | 872              | 1,116         | 28.0       |
| Cambodia                        | 1,979         | 2,120         | 2,123         | 1,541         | 919              | 710           | -22.7      |
| Netherlands                     | 968           | 935           | 742           | 819           | 475              | 359           | -24.4      |
| Sri Lanka                       | 1,356         | 1,277         | 1,183         | 1,183         | 530              | 471           | -11.1      |
| Vietnam                         | 2,221         | 2,465         | 3,706         | 1,960         | 1,206            | 469           | -61.1      |
| Philippines                     | 222           | 714           | 813           | 1,019         | 411              | 856           | 108.3      |
| Pakistan                        | 707           | 547           | 642           | 556           | 329              | 186           | -43.5      |
| Other                           | 7,747         | 7,298         | 6,549         | 5,873         | 2,772            | 2,646         | -4.5       |
| <b>World</b>                    | <b>34,944</b> | <b>33,162</b> | <b>35,526</b> | <b>28,504</b> | <b>17,706</b>    | <b>18,419</b> | <b>4.0</b> |

Source: Thai Customs Department

| Calendar Year | 2015          | 2016          | 2017          | 2018          | 2019          | %Change    | January      |              |              |
|---------------|---------------|---------------|---------------|---------------|---------------|------------|--------------|--------------|--------------|
|               |               |               |               |               |               |            | 2019         | 2020         | %Change      |
| Myanmar       | 7,632         | 7,918         | 7,232         | 7,813         | 8,418         | 8.0        | 795          | 883          | 11.1         |
| Bangladesh    | 6,013         | 4,997         | 5,615         | 6,843         | 4,912         | 21.9       | 381          | 471          | 23.7         |
| Japan         | 3,957         | 4,619         | 2,931         | 2,041         | 2,273         | 11.4       | 340          | 127          | -62.7        |
| China         | 669           | 259           | 673           | 1,065         | 2,965         | 58.2       | 273          | 169          | -38.0        |
| Indonesia     | 701           | 447           | 582           | 959           | 1,592         | 64.8       | 254          | 86           | -66.1        |
| Korea South   | 932           | 858           | 761           | 1,166         | 1,441         | 53.3       | 215          | 129          | -40.0        |
| India         | 15            | 37            | 60            | 722           | 1,832         | 153.6      | 172          | 471          | 174.1        |
| Cambodia      | 1,768         | 1,957         | 2,071         | 2,198         | 1,304         | 6.2        | 119          | 147          | 23.3         |
| Netherlands   | 839           | 1,020         | 848           | 815           | 763           | -3.9       | 112          | 50           | -55.2        |
| Sri Lanka     | 1,298         | 1,415         | 1,187         | 1,065         | 905           | -10.3      | 95           | 59           | -38.0        |
| Vietnam       | 2,260         | 2,541         | 3,072         | 3,134         | 1,294         | 2.0        | 89           | 18           | -79.7        |
| Philippines   | 282           | 398           | 787           | 810           | 1,468         | 2.9        | 79           | 74           | -5.8         |
| Pakistan      | 485           | 660           | 580           | 678           | 453           | 17.1       | 70           | 30           | -56.9        |
| Other         | 8,951         | 7,083         | 7,670         | 5,844         | 6,034         | 3.2        | 399          | 238          | -40.4        |
| <b>World</b>  | <b>35,802</b> | <b>34,209</b> | <b>34,068</b> | <b>35,154</b> | <b>35,654</b> | <b>3.2</b> | <b>3,391</b> | <b>2,952</b> | <b>-13.0</b> |

Source: Thai Customs Department

**Table 7: Employment and Machinery for Thailand's Textile Industry**

|                                    | Calendar Year  |                |                |                |                |                |
|------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                    | 2013           | 2014           | 2015           | 2016           | 2017           | 2018           |
| <b>Number of Employees</b>         |                |                |                |                |                |                |
| - Synthetic fiber                  | 7,211          | 7,200          | 7,193          | 7,198          | 7,211          | 7,215          |
| - Spinning                         | 57,650         | 56,990         | 57,150         | 57,226         | 56,331         | 55,366         |
| - Weaving                          | 52,630         | 52,590         | 51,070         | 51,859         | 51,515         | 51,544         |
| - Knitting                         | 61,900         | 61,510         | 61,650         | 60,285         | 59,780         | 59,613         |
| - Dyeing and Printing              | 41,330         | 41,434         | 41,110         | 41,117         | 41,922         | 41,458         |
| - Clothing                         | 346,250        | 341,857        | 332,010        | 331,380        | 329,085        | 332,380        |
| <b>TOTAL</b>                       | <b>566,971</b> | <b>561,581</b> | <b>550,183</b> | <b>549,065</b> | <b>551,600</b> | <b>547,576</b> |
| <b>Number of Textile Machinery</b> |                |                |                |                |                |                |
| - Spinning (No. of spindles)       | 3,750,000      | 3,930,000      | 3,921,000      | 3,940,820      | 3,992,050      | 3,989,000      |
| - Weaving (No. of looms)           | 134,600        | 135,273        | 132,600        | 133,330        | 133,730        | 133,690        |
| - Knitting (No. of machines)       | 119,160        | 118,803        | 113,730        | 122,200        | 111,980        | 112,370        |
| - Clothing (No. of machines)       | 623,280        | 622,033        | 619,103        | 610,750        | 616,250        | 624,300        |

Source: Thailand Textile Institute

**Table 8: Yarn Production in Thailand**

| Unit: Thousand Metric Tons |               |              |              |              |              |              |              |              |
|----------------------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|                            | Calendar Year |              |              |              |              |              |              |              |
|                            | 2011          | 2012         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         |
| <b>Production</b>          |               |              |              |              |              |              |              |              |
| Cotton yarn                | 315.9         | 303.8        | 293.5        | 292.6        | 333.0        | 321.5        | 308.8        | 305.7        |
| Synthetic yarn             | 493.0         | 502.3        | 541.0        | 582.3        | 521.6        | 521.7        | 547.8        | 493.0        |
| <b>Total production</b>    | <b>808.9</b>  | <b>806.1</b> | <b>834.5</b> | <b>874.9</b> | <b>854.6</b> | <b>843.2</b> | <b>856.6</b> | <b>798.7</b> |

Source: Thailand Textile Institute

**Table 9: Woven Fabric Production in Thailand**

| Unit: Thousand Metric Tons |               |              |              |              |              |              |              |              |
|----------------------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
|                            | Calendar Year |              |              |              |              |              |              |              |
|                            | 2011          | 2012         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         |
| <b>Production</b>          |               |              |              |              |              |              |              |              |
| Cotton fabric              | 185.6         | 176.0        | 148.8        | 154.8        | 154.8        | 199.1        | 196.6        | 196.2        |
| Synthetic fabric           | 254.5         | 272.7        | 281.9        | 317.0        | 317.0        | 271.1        | 290.0        | 281.3        |
| <b>Total production</b>    | <b>440.1</b>  | <b>448.7</b> | <b>430.7</b> | <b>471.8</b> | <b>471.8</b> | <b>470.2</b> | <b>486.6</b> | <b>477.5</b> |

Source: Thailand Textile Institute

End of report.

**Attachments:**

No Attachments