



สมาคมอุตสาหกรรมเส้นใยประดิษฐ์ไทย

Thai Man-Made Fiber Industries Association



ACFIF Secretary-General Meeting Thailand Presentation





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Thai Man-Made Fiber Industries Association

Topics :

Thailand Economic Situation Updating

Thailand Textile Situation

Thailand Man-made Fiber Situation

Summary



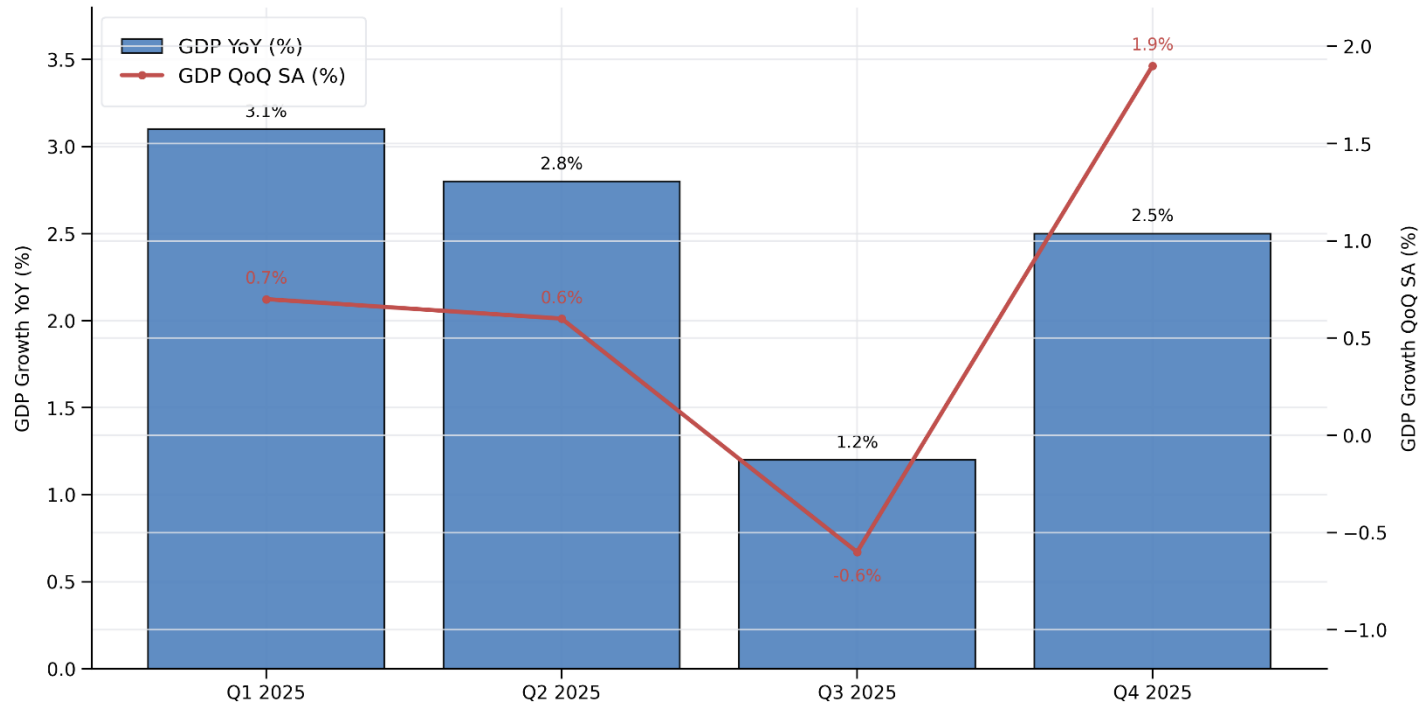
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Thailand Economic Situation Updating



Thailand GDP Growth by Quarter - 2025



Year-over-Year (YoY) Growth:

- Q1 2025: 3.1%
- Q2 2025: 2.8%
- Q3 2025: 1.2%
- Q4 2025: 2.5%

Quarter-over-Quarter Seasonally Adjusted (QoQ SA) Growth:

- Q1 2025: +0.7%
- Q2 2025: +0.6%
- Q3 2025: -0.6%
- Q4 2025: +1.9%

Source: NESDC (National Economic and Social Development Council)

GDP outlook for 2026 from ~1.6% to 2.1%

* Source from : BOT, THTI

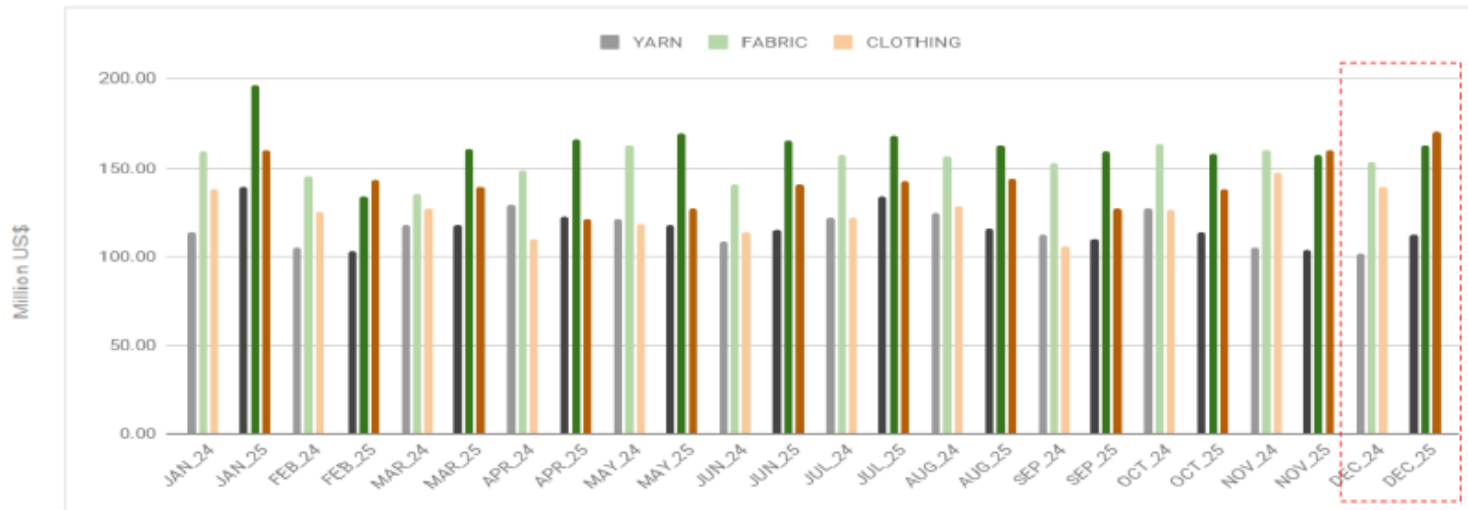


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Thailand Textile Situation

Textile and Clothing Imports : Yarn-Fabric-Clothing



2025	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	DEC 2025_%Δ	
													MoM	YoY
Yarn*	139.5	102.9	118.0	122.7	118.0	115.0	133.8	115.4	110.1	113.4	103.4	112.0	+8.3	+10.7
Fabric	195.7	134.2	160.4	166.6	169.5	165.3	168.4	162.6	159.2	157.7	157.1	163.0	+3.8	+6.2
Clothing	159.7	143.1	139.7	121.3	126.5	141.1	142.1	143.8	126.6	138.3	160.0	170.4	+6.5	+21.8

Note : (*) Including of textile fibers
 Source: Information and Communication Technology Center with Cooperation of The Customs Department
 Compiled by Thailand Textile Institute

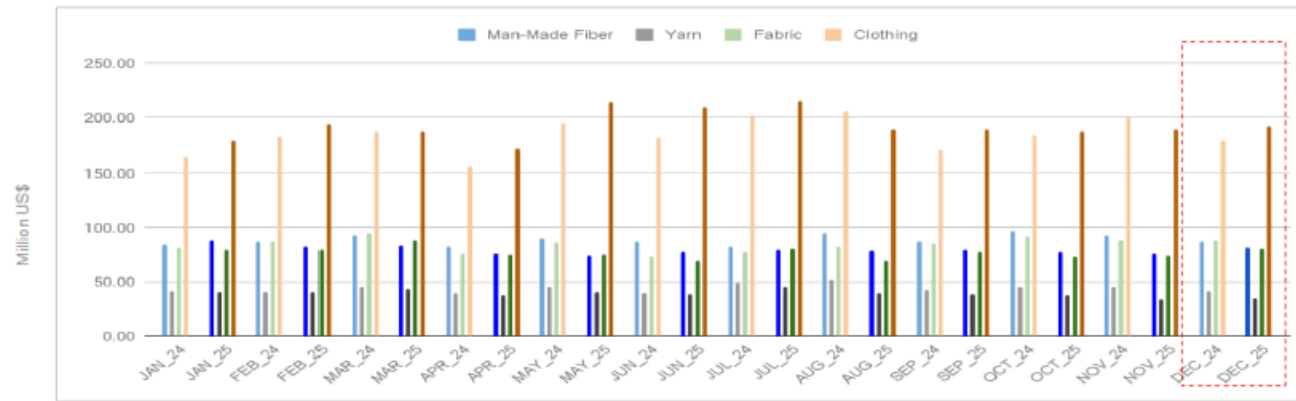


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Thailand Textile Situation

Textile and Clothing Exports : Fiber-Yarn-Fabric-Clothing



2025	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	DEC 2025_%Δ	
													MoM	YoY
M-M Fiber	88.2	82.7	82.8	76.4	74.9	77.6	79.0	78.2	79.5	77.7	76.3	81.3	+6.5	-6.9
Yarn	40.8	40.5	43.2	37.2	41.0	38.5	45.1	39.1	38.1	38.0	34.0	34.9	+2.8	-15.6
Fabric	78.9	79.0	88.4	75.7	75.8	70.1	80.8	69.8	77.2	73.5	74.4	79.9	+7.5	-8.8
Clothing	178.3	193.9	187.3	171.7	214.3	209.9	215.1	189.5	188.9	187.6	189.5	192.5	+1.6	+8.0

Source: Information and Communication Technology Center with Cooperation of The Customs Department
Compiled by Thailand Textile Institute



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Thai Man-Made Fiber Industries Association

❑ Thailand Man-Made Fiber Situation

No.	Product	Export				Difference (%)	
		2024		2025		Value (USD)	Quantity (KGM)
		Value (USD)	Quantity (KGM)	Value (USD)	Quantity (KGM)		
1	55032000 : Polyester Staple Fiber	426,163,034	405,193,637	319,170,466	328,048,188	-25.1%	-19.1%
2	55041000 : Rayon Fiber	201,051,927	124,815,003	189,730,772	116,636,342	-5.8%	-9.8%
3	54023300 : Polyester Textured Yarn	119,676,537	71,616,691	102,824,165	59,456,553	-14.0%	-24.2%
4	54021900 : Nylon Filament Yarn	81,097,064	18,733,284	69,162,729	16,779,782	-14.6%	-10.5%
5	55033000 : Acrylic or modacrylic Fiber	75,782,672	43,756,263	76,758,865	45,867,551	1.30%	4.80%
6	54024900 : Nylon 66 POY, FDY	42,970,050	5,388,348	36,188,384	4,980,993	-15.1%	-7.4%
7	54024700 : Polyester Filament Yarn	22,426,363	8,816,195	22,165,542	8,727,457	-3.8%	-1.6%
8	54024600 : Polyester Pre-Oreinted Yarn	17,849,242	16,734,804	9,682,049	8,929,437	-45.7%	-46.7%
9	54023900 : Nylon 66 Textured, ATY yarn	8,628,902	1,567,547	6,693,251	1,293,821	-22.4%	-17.2%
10	54023100 : Nylon Textured Yarn	6,244,933	639,689	5,876,806	667,430	-7.1%	4.20%
11	54024500 : Nylon POY	1,977,489	341,561	367,792	54,311	-81.4%	-84.1%



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❑ Thailand Man-Made Fiber Situation

No.	Product	Import				Difference (%)	
		2024		2025		Value (USD)	Quantity (KGM)
		Value (USD)	Quantity (KGM)	Value (USD)	Quantity (KGM)		
1	55032000 : Polyester Staple Fiber	55,084,063	44,059,794	55,924,336	48,945,480	1.50%	11.10%
2	55041000 : Rayon Fiber	1,466,792	458,710	2,306,581	819,378	57.30%	78.60%
3	54023300 : Polyester Textured Yarn	121,620,915	55,667,575	127,201,871	60,720,870	4.60%	9.00%
4	54021900 : Nylon Filament Yarn	125,931,468	27,874,906	118,349,245	25,774,049	-6.0%	-7.7%
5	55033000 : Acrylic or modacrylic Fiber	1,684,891	765,188	2,092,768	549,116	24.20%	-28.2%
6	54024900 : Nylon 66 POY, FDY	7,627,555	952,313	7,927,168	1,085,408	3.90%	14.00%
7	54024700 : Polyester Filament Yarn	11,144,728	5,605,224	11,465,617	6,225,130	2.90%	11.10%
8	54024600 : Polyester Pre-Oreinted Yarn	3,123,605	1,922,995	1,368,497	1,048,032	-56.2%	-45.5%
9	54023900 : Nylon 66 Textured, ATY yarn	1,568,235	234,511	2,045,474	450,051	30.40%	92.40%
10	54023100 : Nylon Textured Yarn	9,584,007	2,318,858	11,640,652	2,930,591	21.40%	26.40%
11	54024500 : Nylon POY	25,211,917	4,696,533	25,280,547	4,392,903	0.30%	-6.5%



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Thailand Export of Man-made Fiber



Summary

Thai Export (December 2025) :

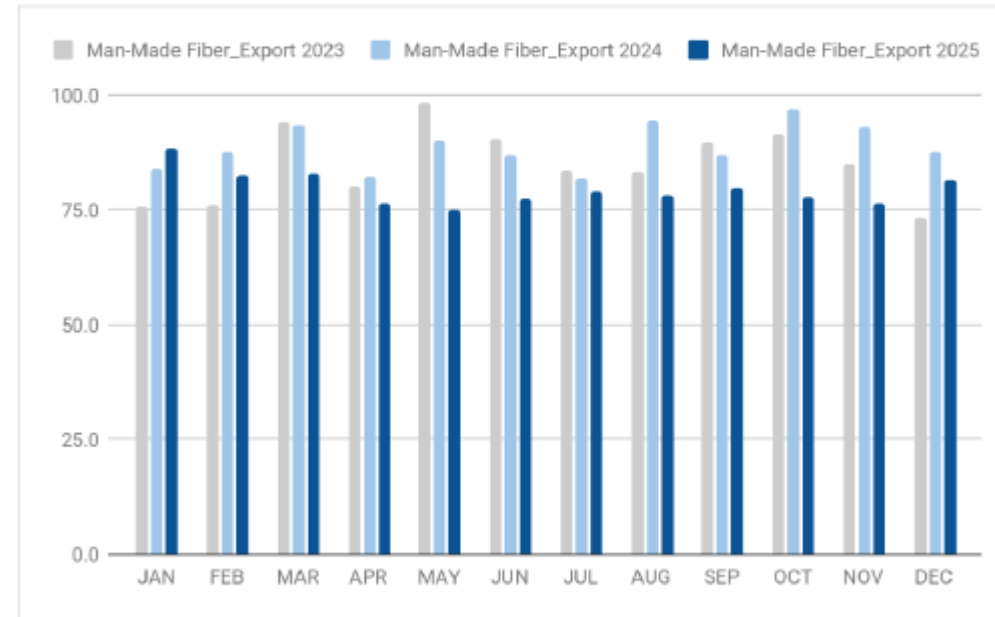


Thai Export (Jan.- Dec. 2025) :



Thailand Export Statistics

Commodity : Textile, Fiber (Man-made fiber)
 Monthly Series : December 2025
 Value : Million USD





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Thai Man-Made Fiber Industries Association

Summary

Thailand Export of Yarn and man-made filament



Thai Export (December 2025) :

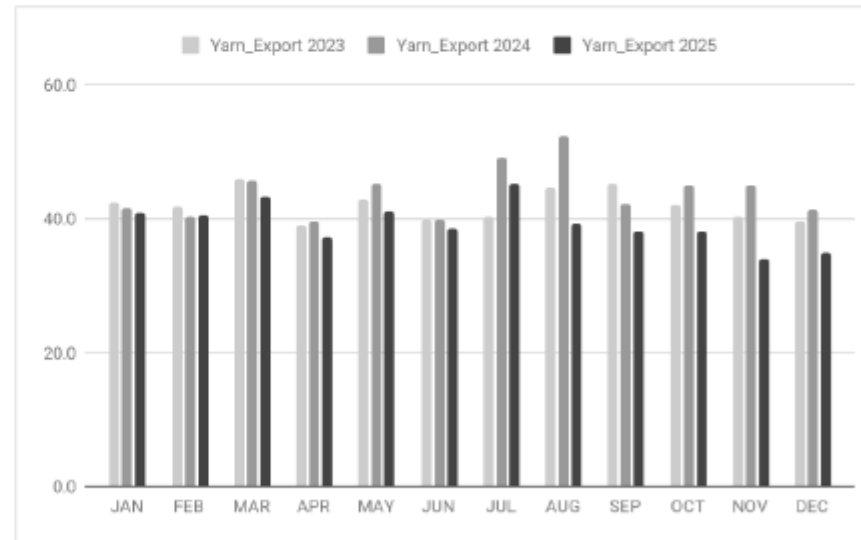


Thai Export (Jan.- Dec. 2025) :



Thailand Export Statistics

Commodity : Textile, Yarn (Yarn and man-made filament)
 Monthly Series : December 2025
 Value : Million USD





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Thai Man-Made Fiber Industries Association

Summary



Thailand Export of Woven Fabric

Thai Export (December 2025) :



Thai Export (Jan.- Dec. 2025) :

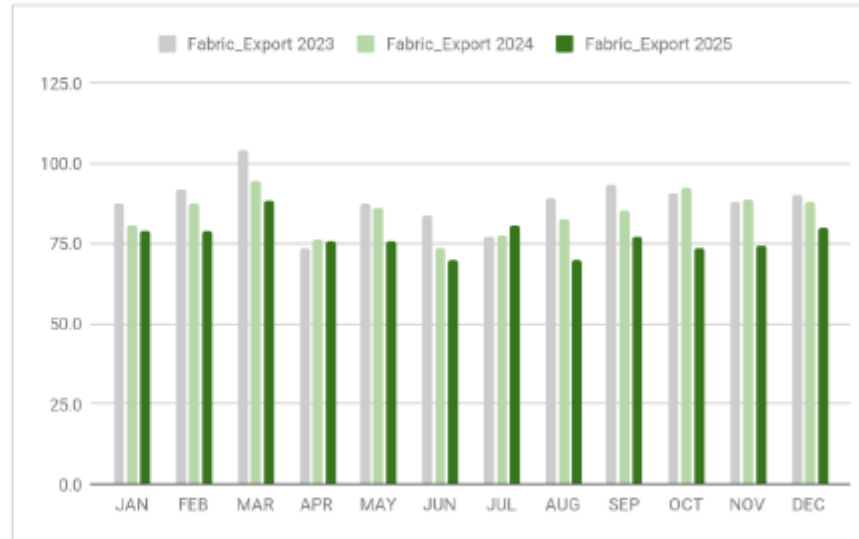


Thailand Export Statistics

Commodity : Textile, Fabric (Woven fabric of cotton, man-made fibre, silk or silk waste and other textile material)

Monthly Series : December 2025

Value : Million USD





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Summary



Thailand Export of Clothing

Thai Export (December 2025) :

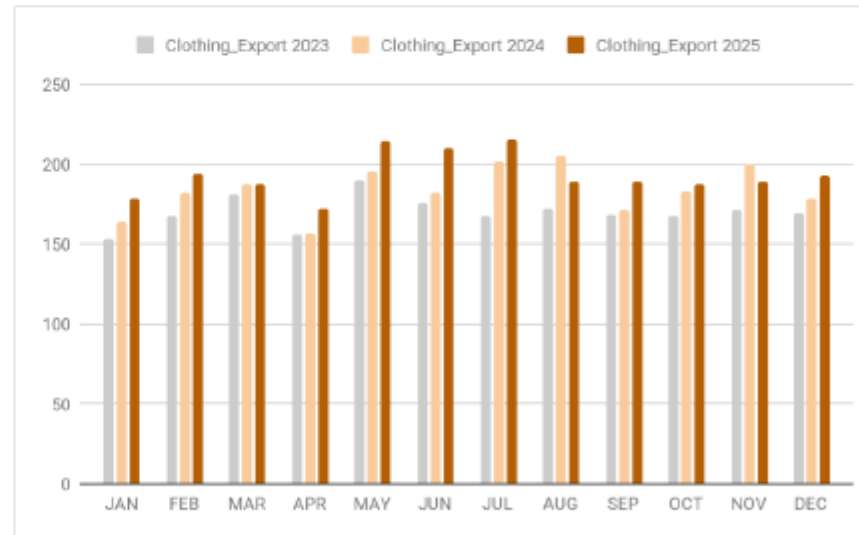


Thai Export (Jan.- Dec. 2025) :



Thailand Export Statistics

Commodity : Clothing (Articles of apparel and clothing accessories)
 Monthly Series : December 2025
 Value : Million USD



Source: Information and Communication Technology Center with Cooperation of The Customs Department
 Compiled by Thailand Textile Institute



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Thai Man-Made Fiber Industries Association

Summary



Thailand Import of Yarn

Thai Import (December 2025) :

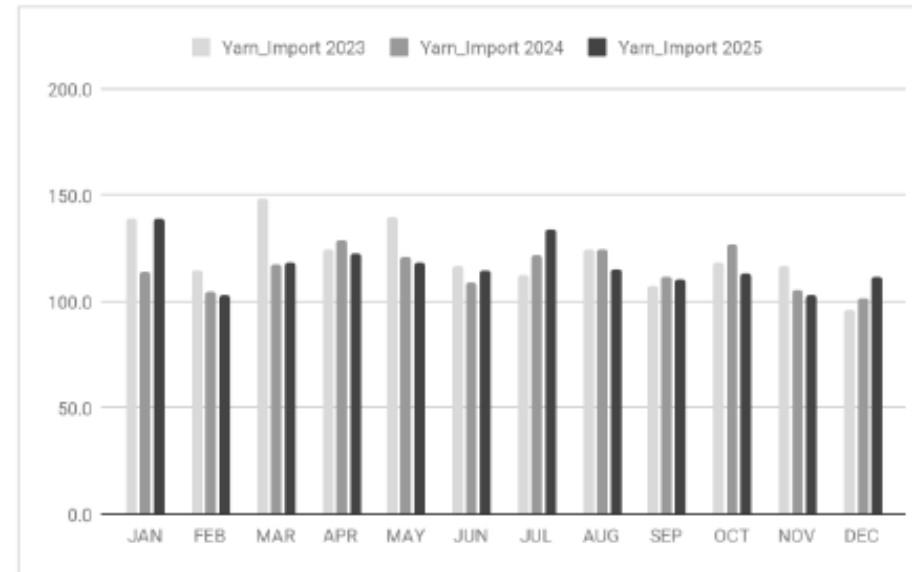


Thai Import (Jan.- Dec. 2025) :



Thailand Import Statistics

Commodity : Textile, Yarn (Textile Fibers, Textile yarn & thread, Other textile materials)
 Monthly Series : December 2025
 Value : Million USD





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Summary



Thailand Import of Fabric

Thai Import (December 2025) :

163.0 MU\$



+10.4%

[Value : 98.1 MU\$]
[Share 60.2%]



+1.3%

[Value : 14.5 MU\$]
[Share 8.9%]



+12.7%

[Value : 13.9 MU\$]
[Share 8.5%]

+6.2% YoY

Thai Import (Jan.- Dec. 2025) :

1,959.7 MU\$



+9.1%

[Value : 1,114.3 MU\$]
[Share 56.9%]



-1.2%

[Value : 199.3 MU\$]
[Share 10.2%]



+17.2%

[Value : 170.6 MU\$]
[Share 8.7%]

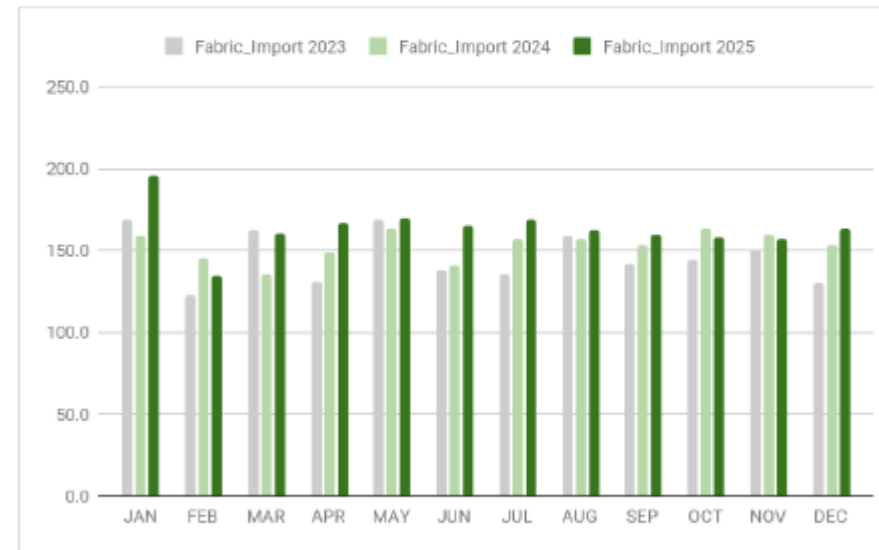
+6.7% YoY

Thailand Import Statistics

Commodity : Textile, Fabrics (Woven fabrics of silk, animal hair, cotton yarn, synthetic fibres & artificial fibres and Other)

Monthly Series : December 2025

Value : Million USD





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Thailand Import of Clothing



Summary

Thai Import (December 2025) :



Thai Import (Jan.- Dec. 2025) :

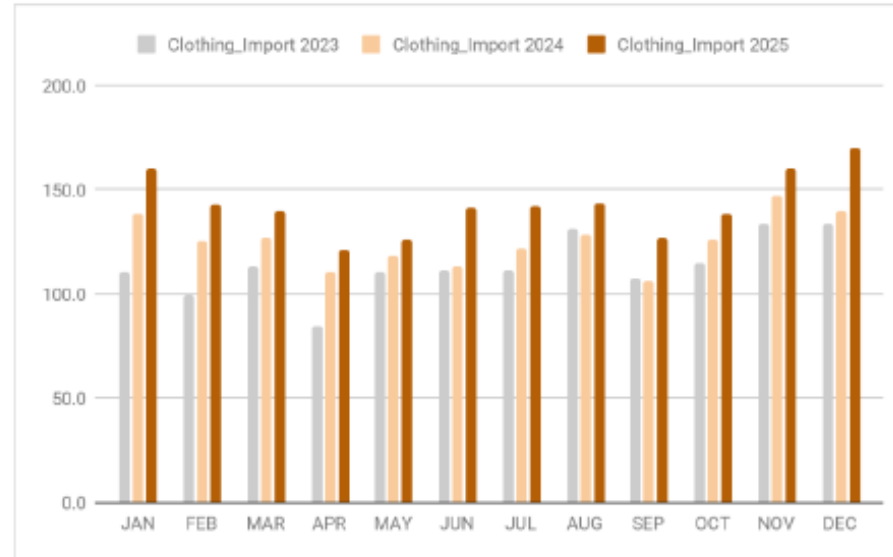


Thailand Import Statistics

Commodity : Clothing (Suits, Shirts/Blouses, Jackets & blazers, Plants/Skirts & Accessories, Underwear & gowns, Others)

Monthly Series : December 2025

Value : Million USD



Note: This value is specific of clothing's import product

Source: Information and Communication Technology Center with Cooperation of The Customs Department

Compiled by Thailand Textile Institute



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Thai Textile & Garment Industry: 2024 vs 2025–2026

□ Summary

2024:

- Manufacturing expanded in **textile fiber groups** (artificial fibers, cotton yarn, artificial-fiber yarn) and **ready-made garments**.
- **Domestic sales**, particularly **of artificial fibers**, increased, supported by tourism recovery and government economic stimulus measures.
- Domestic consumption **strengthened**, driving continued growth in production and sales.
- **Exports were expected to improve**, supported by economic recovery in **the US, China, Japan, and Belgium**.



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□ Summary

2025–2026 :

- Production growth continued but became **more selective**, with stronger performance in **downstream segments** and products linked to domestic demand.
- **Domestic consumption remained the key growth driver**, supported by tourism, stimulus measures, and gradual improvement in consumer confidence.
- **Export performance turned uneven**, with continued shipments to **the US, Japan, and selected EU markets**, but weaker momentum **from China** and higher trade and cost pressures.
- Overall industry growth relied increasingly **on domestic sales and niche export markets**, rather than broad-based export expansion.



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TREND of Thai Textile and Clothing Industries 2025

□ Summary

WORLD OVERALL TRADING:

- **Revenue:** The global apparel market is projected to reach approximately **\$1.84 trillion USD** in 2025.
- **Growth Rate:** The market is expected to grow at an annual rate of around **2.64%** between 2025 and 2029
- **Key Drivers:** Growth will be driven by factors such as increased tourism in Europe, the resilience of high-net-worth individuals in the United States, and new growth engines in Asia, particularly Japan, Korea, and India.



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TREND of Thai Textile and Clothing Industries – 2026

Summary

- **Revenue:** The global apparel market is projected to reach approximately USD 1.89 trillion in 2026, reflecting continued but moderate expansion from 2025 levels
- **Growth Rate:** The market is expected to grow at an annual rate of around 2.5–2.6% during 2026–2030, indicating a low-to-mid single-digit growth environment as the industry normalizes after post-pandemic recovery



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Key Drivers:

[Summary](#)

Growth in 2026 is expected to be driven by:

- **Resilient consumer demand in the United States**, supported by relatively stable disposable income and non-luxury apparel consumption
- **Continued recovery in tourism-related demand in Europe**, supporting fashion and seasonal apparel purchases
- **New growth engines in Asia, particularly India, Japan, and Korea**, driven by expanding middle-class consumption, urbanization, and e-commerce penetration
- **Geopolitical developments, including the ongoing Middle East conflict**, which are directly influencing the industry through **energy price volatility, higher logistics and freight costs, and supply-chain uncertainty**, reinforcing the need for cost control, market diversification, and flexible sourcing strategies.



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The outlook for the Thai textile and clothing industries in 2026 shows several key trends:

[Summary](#)

▪ **Shift to sustainability & value-added products**

Focus on sustainable materials, traceability, and compliance, with higher-value and specialized products replacing volume-driven growth.

▪ **Technology-led efficiency gains**

Increased use of automation and smart manufacturing to offset rising labor and energy costs and improve productivity.

▪ **Moderate exports amid geopolitical risk**

Export growth remains uneven due to tariffs, compliance costs, and global slowdown; **Middle East conflict** adds pressure through energy and logistics cost volatility.

▪ **Accelerating structural transformation**

Rising costs and competition are driving diversification into **technical textiles, functional fabrics, and home textiles**, with domestic demand playing a larger role.

ขอบคุณครับ
ขอบคุณค่ะ
Thank You

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