

### Industrial Production Status

Indicators	2019	2020	2020							2021					
%YoY	Year	Year	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.
MPI	-3.4	-9.3	-17.9	-13.6	-9.3	-2.6	-1.3	-0.6	-2.8	-2.0	-1.4	5.9	18.0	25.7	17.6

The industrial economy in **June 2021**, when considered from the **Manufacturing Production Index (MPI)**, **grew 17.6 percent from the same period last year**. This was partly benefited by a low comparative base of MPI in June 2020, the month that was affected by the first wave of the COVID-19 outbreak, including a good growth of exports this year.

When considering MPI data for the past three months compared to the previous year (% YoY), production in March, April, and May 2021, increased by 5.9, 18.0, and 25.7 percent, respectively.

Indicators	2020							2021					
%MoM	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.
MPI	4.1	4.6	5.2	3.8	0.3	1.6	-0.7	6.9	-3.1	10.2	-16.5	9.8	-2.65

In the past three months (March, April, and May 2021), the MPI change rates (%MoM) were as follows: an increase of 10.2 percent in March, a decrease of 16.5 percent in April, and an increase of 9.7 percent in May.

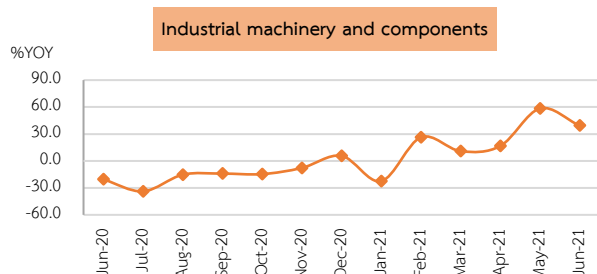
**Key industries that contributed to the MPI expansion in June 2021** compared to the same month last year were:

- **Automobiles and parts:** The MPI increased by 90.06 percent from the low MPI base last year from lockdown measures in many countries worldwide. As for this year, the economies of major trading partners, such as Australia, New Zealand, Vietnam, and Japan, recovered, causing the exports to increase.
- **Electronics:** The MPI grew by 32.32 percent, in line with the world's growing demand for electronic parts. Additionally, the demand for products to work from home increased, coupled with the trend of technological product development as a factor that encouraged the use of electronic components in a variety of industries.
- **Iron and steel:** The MPI increased by 28.93 percent, in line with the demand for continuous industrial use, especially automotive and electrical appliances. Furthermore, construction of basic public utilities accelerated, coupled with the low MPI base last year. High steel prices also caused some steel consumers to increase their orders to stockpile goods.
- **Jewelry:** The MPI increased by 178.89 percent, as last year was the start of the relaxation on the country's lockdown measures, causing the production and sales to remain at a low volume. Unlike this year, the production return to normal, including more online distribution channels contributing to sales growth.
- **Automotive tires:** The MPI grew by 78.19 percent due to the COVID-19 pandemic and lockdown measures last year, causing product demand to shrink. Meanwhile, this year, automotive tires increased in line with the growth of automobile production, including price reductions and promotions to boost sales.

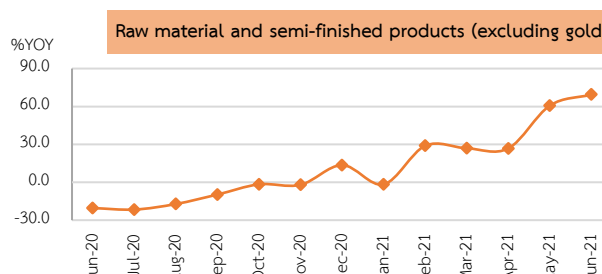
## Other Industrial Economic Indicators in June 2021

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### ■ Imports of Thailand Industrial Sector



Source: Ministry of Commerce

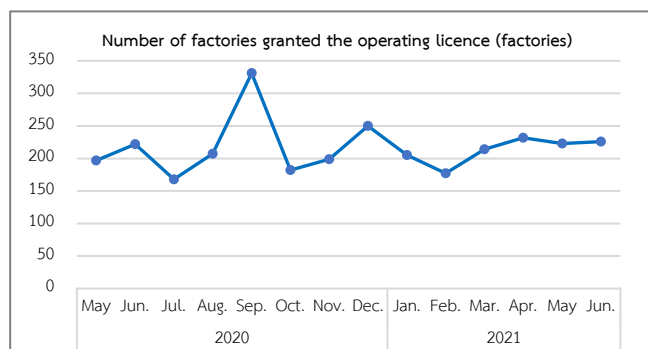


Source: Ministry of Commerce

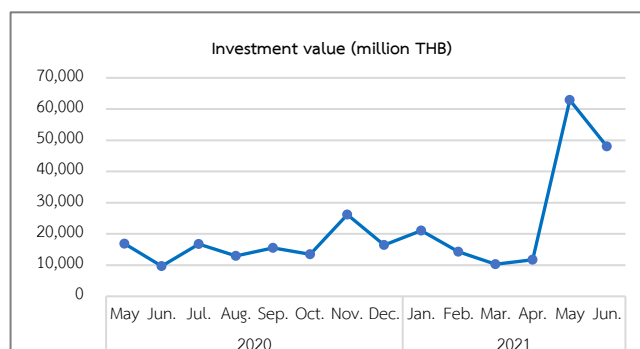
**+** In June 2021, industrial machinery and parts imports increased by 39.3 percent compared to the same month last year to 1,581.1 million USD. The increase was from the importation of engines, transmission shafts, and other parts, air pumps, fluid pumps, construction machinery and parts, bearings; rubber or plastic processing machinery and parts.

**+** In June 2021, imports of raw and semi-finished goods (excluding gold) increased by 69.4 percent compared to the same month last year to 9,674.7 million USD. The increase was from the importation of iron, semi-finished products of iron or stainless steel, organic chemical products, plastic pellets, copper and copper products, and aluminum and products thereof.

## Industrial Operation Status



Source: Department of Industrial Works



Source: Department of Industrial Works

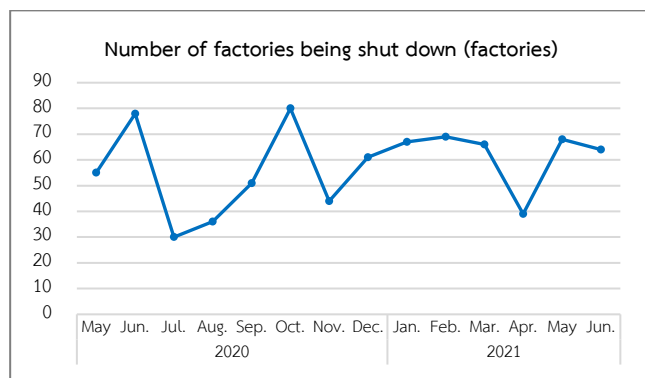
**+** The total number of factories licensed for operation in June 2021 was 226 factories, increasing by 1.35 percent (%MoM) from May 2021 and 1.8 percent (%YoY) from the same month last year.

**+** The total investment from factories licensed for operating in June 2021 decreased by 23.59 percent (%MoM) from May 2021 to 48,039 million THB but increased by 396.51 percent (%YoY) from the same month last year.

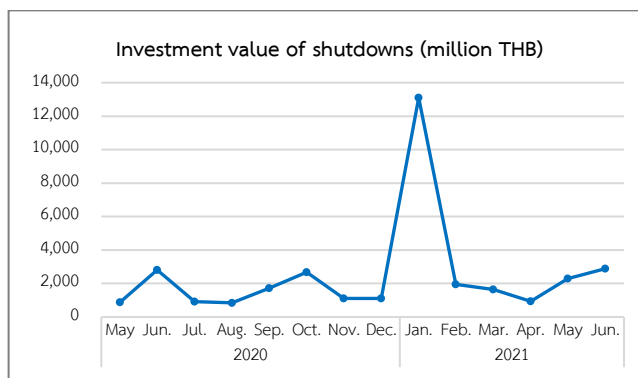
*"The industry with the highest number of newly licensed factories to operate in June 2021 was the manufacture of concrete, ready-mixed concrete articles, and gypsum products (28 factories) and the excavation or dredging industry of gravel, sand, or soil (16 factories)."*

*"In June 2021, the industry with the highest investment value was the electric power generation from thermal energy (33,501 million THB), followed by the manufacture of medical instruments, tools, or equipment (419 million THB)."*

## ■ Industrial Operation Status (cont.)



Source: Department of Industrial Works



Source: Department of Industrial Works

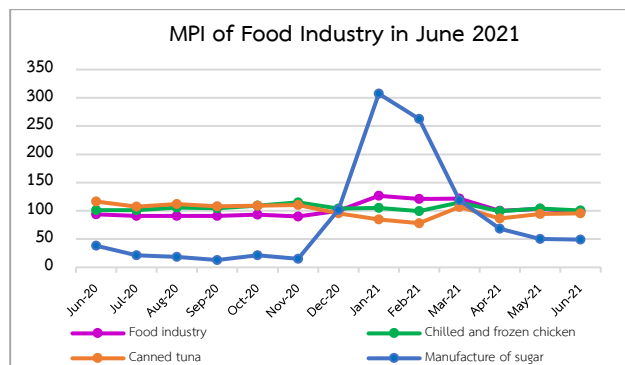
- + A total of 64 factories were shut down in June 2021, decreasing by 5.88 percent (% MoM) from May 2021 and 17.95 percent (% YoY) from the same month last year.
- The lost investment value on shutdown in June 2021 totaled 2,884 million THB, increasing by 25.63 percent (%MoM) from May 2021 and 2.32 percent (%YoY) from the same month last year.

*“In June 2021, the industry with the highest number of factory shutdowns was the excavation or dredging industry of gravel, sand, or soil (7 factories), followed by the sand dredging industry (6 factories).”*

*“In June 2021, the shutdown industries with the highest investment value were the packaging industry of non-specialized products (1,080 million THB), followed by the manufacture of glasses, optical cables or glass products (419 million THB).”*

## Industrial Economic Status by Industrial Sectors in June 2021

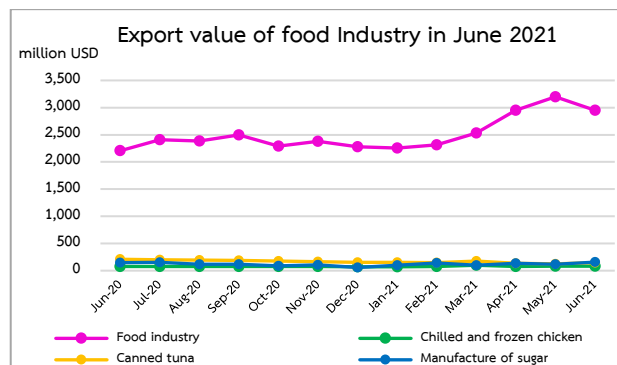
### 1. Food Industry



Source: The Office of Industrial Economics

**+** **Production:** In June 2021, the production increased by 3.1 percent (%YoY) from continual orders for some products as the global economy gradually recovers. Food products with the increasing MPI were as follows: (1) cassava—an increase of 34.0 percent from tapioca starch, (2) sugar an increase of 27.6% from white sugar and refined sugar; (3) vegetable oil—an increase of 23.9 percent from soybean oil; (4) processed vegetables and fruits—an increase of 8.6 from canned pineapple; (5) livestock—an increase of 3.5 percent from cooked chicken.

However, some products that decreased production, such as: (1) canned aquatic animals—the production dropped 17.9 percent due to a slowdown in orders and product deliveries caused by high freight charge. This coupled with last year's high production base, which was the first wave of the COVID-19 outbreak, where canned aquatic animals were in demand worldwide; (2) palm oil—the production dropped 7.1 percent, mainly from crude palm oil, due to a decrease in oil palm raw materials from the same period last year.



Source: Ministry of Commerce

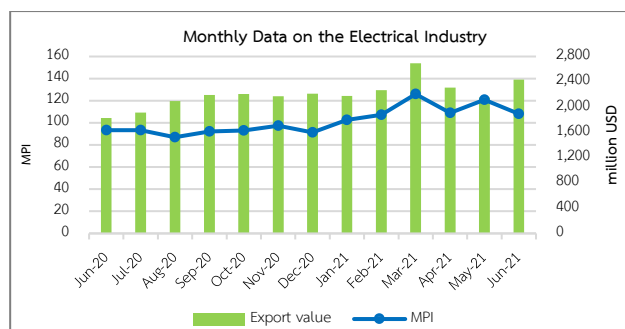
**-** **Domestic sales:** Production volume for domestic food products in June 2021 decreased by 0.9% (%YoY) from key products as follows: (1) fishery—a decrease of 14.9 percent from minced fish products; (2) milled/grind cereal products—a decrease of 15.3 percent mainly from soybean milk; (3) processed vegetables and fruits—a decrease of 12.8 percent mainly from canned pineapple; (4) sugar—a decrease of 10.2 percent mainly from raw sugar, white sugar, and refined sugar.

**+** **Export markets:** Overview of food exports in June 2021 was valued at 2,951.26 million USD, increasing from the same period last year by 32.8% (%YoY) from key products: (1) fresh, chilled, frozen, canned, and processed vegetables and fruits—the products are of quality and are accepted by world-class standards. Export markets with good growth included China, Vietnam, Malaysia, and the US; (2) cassava products—the demand increased in key markets, such as China and Taiwan, to be used as raw materials in the ethanol, food, and animal feed industries; (3) pet food—with the growing trend of raising pets around the world together with a new way of living and people treating their pets a part family members; therefore, it is an opportunity that Thailand may become the world's third-largest pet food exporter. Export markets with good growth were Italy and the US; (4) sugar—the demand increased along with the recovery of the global economy. In addition, sugar exports expanded in ASEAN markets, such as Cambodia, Laos, and Malaysia.

**Forecasts and trends:** In July 2021, the overall food industry's MPI and export value are projected to expand in export and domestic markets compared to the same period last year due to the recovery of trading partners and stimulus package through the third phase Co-payment scheme."

## 2. Electrical and Electronics Industry

### ■ Electrical Industry



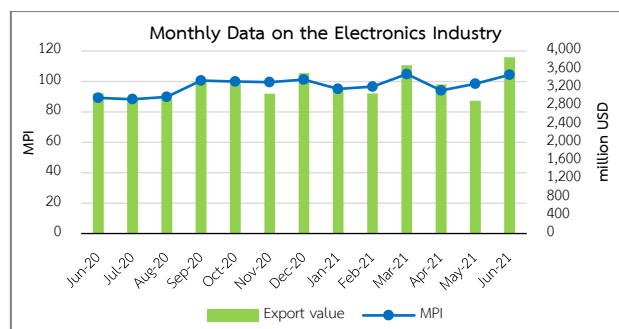
Source: The Office of Industrial Economics, Electrical and Electronics Institute, and Ministry of Commerce

➕ **Production of electrical appliances** increased by 16.9 percent compared to the same month last year with an MPI of 108.1 points. Products that increased in production were rice cookers (57.9%), compressors (57.5%), electric motors (46.7%), electric wires (29.0%), thermo pots (26.9%), cables (20.0%), microwaves (15.4%), refrigerators (12.2%), air-conditioners (12.1%), washing machines (6.1%), and household fans (0.7%). The increment was due to an increase in domestic sales and orders from international markets.

➕ **Exports of electrical appliances** increased by 42.3 percent compared to the same month last year to 2,432.2 million USD. Products that increased in orders were (1) electric wires and cables—an increase of 107.3 percent to 93.8 million USD from ASEAN, the US, and Europe markets; (2) circuit breakers—an increase of 68.1 percent to 162.5 million USD from the US, ASEAN, and Mexico markets; (3) transformers and parts—an increase of 48.3 percent to 226.6 million USD from Europe, the US, and ASEAN markets; (4) microwave ovens—an increase of 36.8 percent to 20.9 million USD from Singapore, ASEAN, and the US markets; (5) chiller's compressors and parts—an increase of 35.8 percent to 239.9 million USD from Europe, the US, and ASEAN markets. (6) electric motors—an increase of 34.7 percent to 88.9 million USD from Europe, Mexico, and ASEAN markets.

*"Production outlook for July 2021: The electrical industry is projected to increase by about 20.0 percent compared to the same month last year because trading partners' economies, such as the US, the EU, and China, started to recover. Furthermore, the development of innovations such as air-conditioners that can capture PM 2.5 and prevent germs, and changing seasons cause the demand for electrical appliances to increase."*

### ■ Electronics Industry



Source: The Office of Industrial Economics, Electrical and Electronics Institute, and Ministry of Commerce

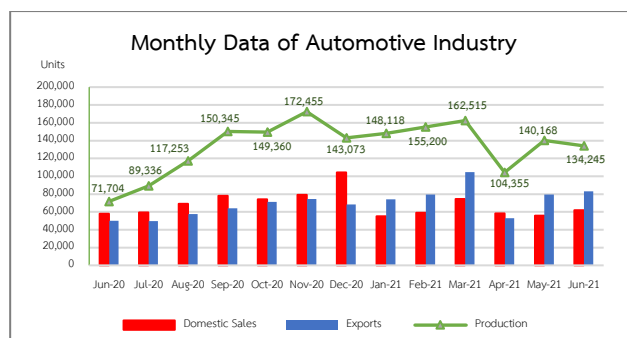
➕ **Production of electronics** increased by 17.0 percent compared to the same month last year with an MPI of 104.4 points. Products that increased in production were PCBAs (72.6%), PWBs (37.6%), ICs (23.6%), semiconductor devices transistors (15.6%), and HDDs (7.7%). The increment resulted from an increase in domestic sales and overseas orders.

➕ **Exports of electronics products** were 3,867.2 million USD, an increase of 24.0 percent (%YoY). Products that increased in orders were (1) printed circuit boards—an increase of 59.2 percent to 145.7 million USD to South Korea, India, and the US markets; (2) HDDs—an increase of 33.5 percent to 1,297.9 million USD to Singapore, Taiwan, and Europe markets; (3) circuit boards—an increase of 32.8 percent to 770.6 million USD to Mexico, Europe, and ASEAN markets; (4) diodes, transistors, semiconductors, and components—an increase of 4.9 percent to 251.0 million USD to Indonesia, India, and Canada markets.

*"Production outlook for July 2021: The electronics industry is projected to continue to grow by approximately 15.0 percent compared to the same period last year. This is due to the continuous expansion of the global market, resulting in the growing demand for electronic products, such as semiconductor and HDD products. Furthermore, the expansion and development of 5G network equipment have led to an increasing demand for electronic equipment and parts domestically and internationally."*

### 3. Automotive Industry

#### ■ Automotive Manufacturing Industry



Source: The Office of Industrial Economics who obtained data from Automotive Division, Federation of Thai Industries.

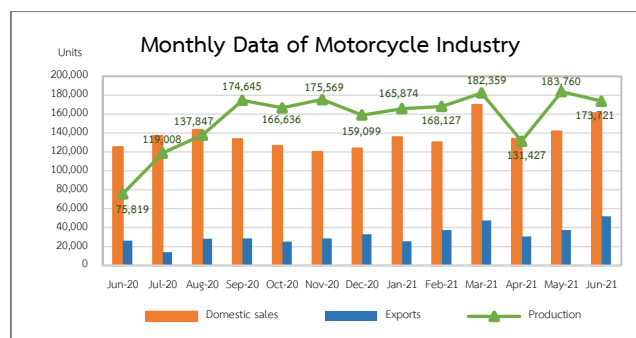
**+ Automotive production:** In June 2021, production reached 134,245 units, decreasing from May 2021 (%MoM) by 4.23 percent but increasing from the same month of last year by 87.22 percent (%YoY). The increase was from passenger cars, 1-ton pickup trucks and derivatives, and commercial vehicles due to last year's low production base caused by the first wave of the COVID-19 outbreak last year.

**+ Domestic automobile sales:** In June 2021, domestic sales reached 61,758 units, increasing from May 2021 by 10.38% (%MoM) and 15.07 percent (%YoY) over the same month last year. This resulted from an increase in sales of passenger cars, commercial vehicles, PPVs, and SUVs due to last year's low sales base.

**+ Automobile exports:** In June 2021, exports reached 83,022 units, increasing from May 2021 by 4.46 percent (%MoM) and 65.88 percent (%YoY) from the same month last year due to last year's low export base and the expansion of economic activities of trading partners.

*“Automotive industry outlook for July 2021: The industry is projected to grow compared to July 2020, as the automobile production base in July 2020 declined from the impacts of the COVID-19 pandemic and the recovery of international trading partners.”*

#### ■ Motorcycle Manufacturing Industry



Source: The Office of Industrial Economics who obtained data from Automotive Division, Federation of Thai Industries.

**+ In June 2021, motorcycle production** decreased by 5.46 percent (%MoM) from May 2021 to 173,721 units but increased by 129.13 percent (%YoY) from the same month last year as a result of an increase in the production of multi-purpose and sport motorcycles.

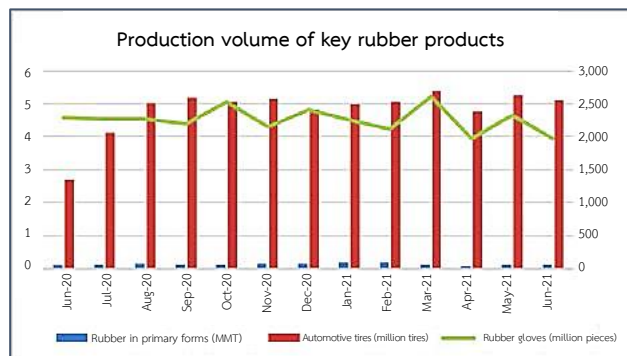
**+ In June 2021, domestic sales of motorcycles** increased by 13.55 percent (%MoM) from May 2021 to 161,105 units and increased by 28.86 percent (%YoY) over the same month last year from an increase in sales of 51-110 cc, 111-125 cc, 126-250 cc, and 251-399 cc motorcycles.

**+ In June 2021, motorcycle exports** increased by 39.06 percent (%MoM) from May 2021 to 52,139 units and increased by 99.40 percent (%YoY) from the same month last year, whereby exports markets for Completely Build Units (CBU) increased in China, the US, Belgium, and the UK markets.

*“Motorcycle industry outlook for July 2021: The industry is projected to grow compared to July 2020 due to the low production base in July 2020 caused by the impact of COVID-19 outbreak and the recovery of trading partners.”*



## 4. Rubber and Rubber Product Industry



Source: The Office of Industrial Economics

### Production

➕ *Processed rubber in primary forms (smoked rubber sheets, rubber blocks, and concentrated latex)* increased by 23.32 percent from the production growth of all processed rubber in primary form products.

➕ *Automotive tires* increased by 88.07 percent because of the continued growth of domestic and international markets, together with the relatively low production base last year.

➖ *Rubber gloves* decreased by 14.06 percent because some factories temporarily shut down operations due to the COVID-19 infection of employees.

### Domestic Sales

➕ *Processed rubber in primary forms (smoked rubber sheets, rubber blocks, and concentrated latex)* increased by 16.8 percent from the rubber blocks and concentrated latex sales.

➕ *Automotive tires* increased by 72.33 percent due to the good expansion of the domestic automotive industry and the relatively low base of sales last year.

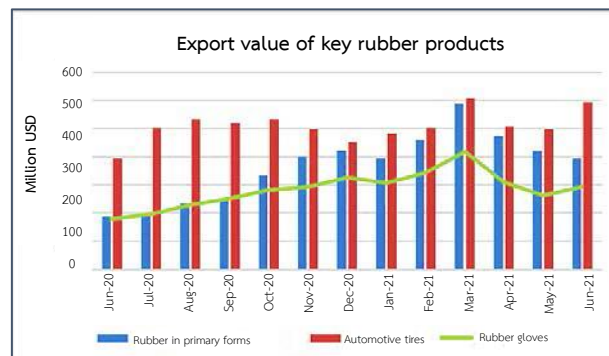
➕ *Rubber gloves* increased by 6.04 percent, which was in line with growing demands. The increase was partly from consumer purchases for stockpiling due to concerns about contracting the COVID-19.

### Exports

➕ *Processed rubber in primary forms (smoked rubber sheets, rubber blocks, and concentrated latex)* increased in export value by 111.78 percent from the expansion of exports of all processed rubber in primary forms.

➕ *Automotive tires* increased in export value by 50.37 percent following the expansion of the US, Australia, and South Korea markets.

➕ *Rubber gloves* increased in export value by 62.41 percent following the continued expansion of the US, the UK, and the Netherlands markets.



Source: Ministry of Commerce

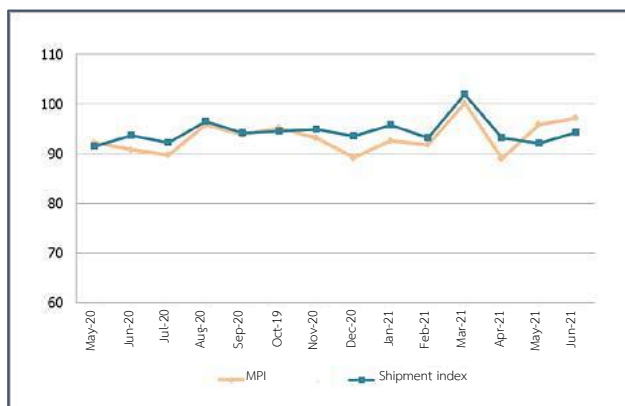
### Outlook for the industry in July 2021

The production of processed rubber in primary forms (smoked rubber sheets, rubber blocks, and concentrated latex) is expected to stabilize or grow slightly. As Thailand enters the rainy season, increased rainfall will result in a decreased amount of rubber entering the market. Automotive tire production and sales of automotive tires are expected to grow continuously from the previous month in line with the good expansion of domestic and international markets. As for rubber gloves, production is expected to slow down due to the COVID-19 outbreak in factories, causing some factories to be temporarily closed. However, the overall rubber glove industry remains on the rise from a continuously increasing demand for medical use. This is in line with the domestic rubber gloves sales that tend to improve from higher demand.

The export value of processed rubber in primary forms (smoked rubber sheets, rubber blocks, and concentrated latex) is expected to increase, especially in China—a major market for smoked rubber sheets and rubber blocks—and Malaysia—a major market for concentrated latex. As for exports of automotive tires, export value is expected to rise continuously from the positive growth trend of the US, Australia, South Korea, Vietnam, and Japan markets. As for rubber gloves, export value is expected to grow in line with rising global demand, especially in the US, the UK, Japan, and the EU markets.

## 5. Plastics Industry

### MPI and Shipment Index



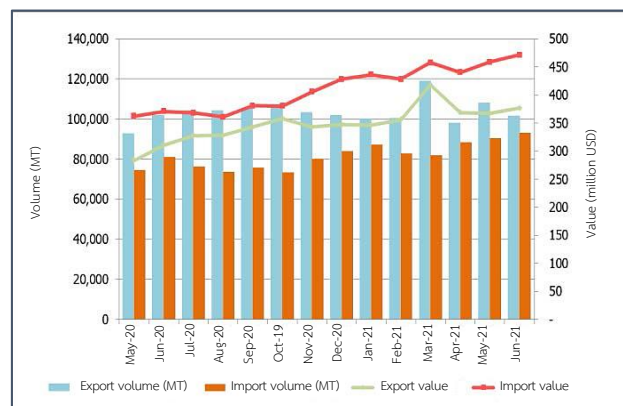
Source: The Office of Industrial Economics

**+** **Manufacturing Production Index:** In June 2021, the index stood at 97.18 points, increasing from the same period last year by 7.05 percent. The production grew among products such as plastic sheets (30.17%), plastic films (26.89%), other plastic packaging (17.44%).

**+** **Shipment Index:** In June 2021, the index stood at 94.29 points, an increase of 0.68 percent from the same period last year. Plastic products that increased in shipment index were plastic sheets (38.18%), other plastic packaging (10.16%), and plastic films (10.13%).

**+** **Exports:** In June 2021, exports were valued at 376.68 million THB, an increase of 21.20 percent compared to the same period last year. Plastic products that contribute to the increase of export from the same period last were monofilament (HS 3916) (106.81%), sanitary ware (HS 3922) (57.71%), self-adhesive plates, sheets, film, foil, tape, strip, and other flat shapes of plastics (HS 3919) (44.82%). Exports expanded in key markets, such as the US, Japan, Vietnam, and China.

### Volume and value of exports-imports

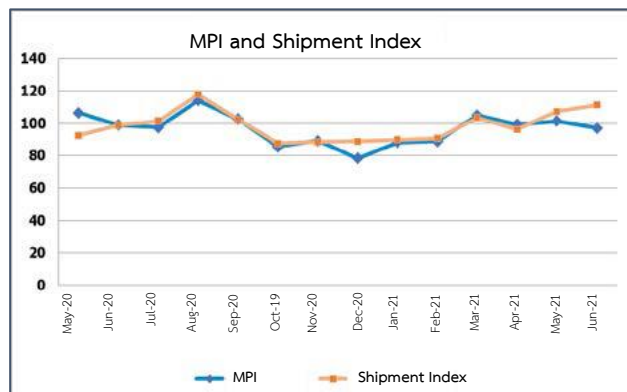


Source: Office of the Permanent Secretary, Ministry of Commerce

**+** **Imports:** In June 2021, imports increased in value by 27.14 percent compared to the same period last year to 471.31 million USD. Key products contributing to an increase in imports from last year were sanitary ware (HS 3922) (85.86%), monofilament (HS 3916) (42%), and self-adhesive plates, sheets, film, foil, tape, strip, and other flat shapes of plastics (HS 3919) (41.39%).

*Plastics industry outlook:* In July 2021, it is projected that production and exports will increase. However, the new wave of the COVID-19 outbreak must be monitored, as it will affect the economic recovery and the growth of the plastics industry."

## 6. Chemical Industry

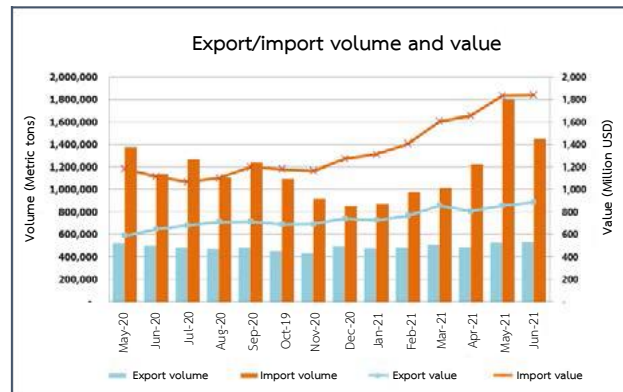


Source: The Office of Industrial Economics

**⊖ Manufacturing Production Index:** In June 2021, the index decreased by 1.75 percent compared to the same period last year. The production of downstream chemicals dropped 5.51 percent compared to the same period last year. Products with a decrease in production were chemical fertilizers (-25.51%), soaps and skincare (-17.71%), dishwashing liquid (-14.34%). However, production of upstream chemicals grew by 13.32 percent compared to the same period last year, and products with the highest increase in output were chlorine (48.57%).

**⊕ Shipment index:** In June 2021, the chemical industry's shipment index stood at 111.27 points, increasing from the same period last year by 12.58 percent. Upstream chemicals' shipment index grew by 109.88 percent in chlorine products (60.67%). As for downstream chemical products, the shipment index increased by 111.61 percent among products, such as washing powder (32.58%) and industrial paints (27.38%).

**⊕ Exports:** In June 2021, the total export value was 886.03 million USD, an increase of 36.94 percent compared to the same period last year. Export value of upstream chemical products reached 525.01 million USD, increasing 51.37 percent compared to the same period last year. As for downstream chemical products, export value was 361.02 million USD, up 20.27 percent. Products contributing to the increment of export value were miscellaneous chemical products (57.29%) and organic chemicals (52.90%). Exports of chemical products expanded in many markets such as China, Vietnam, Japan, and India.

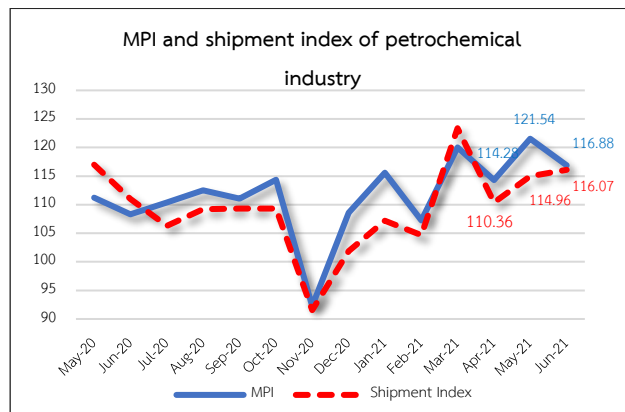


Source: Office of the Permanent Secretary, Ministry of Commerce

**⊕ Imports:** In June 2021, imports were valued at 1,839.29 million USD, an increase of 65.16 percent from the same period last year. Imports of upstream chemical products increased in value by 74.30 percent from last year to 1,189.13 million USD. Likewise, imports of downstream chemical products increased in value by 50.71 percent from last year to 650.16 million USD.

*Chemical Industry Outlook for July 2021:* The latest outbreak situation of the COVID-19 has caused the domestic economy to slow down, and oil prices tend to increase, which affects the cost of raw materials, causing the cost of goods to rise accordingly.

## 7. Petrochemical Industry

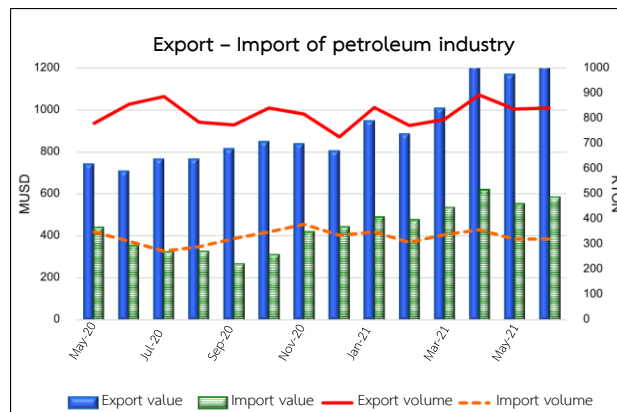


Source: The Office of Industrial Economics

**+** **Manufacturing Production Index:** In June 2021, the production of petrochemical industry increased by 7.72 percent compared to the same period last year to 116.88 points but decreased from last month by 4.60 percent. Upstream petrochemicals that increased in the MPI were Ethylene (16.19%) and Benzene (8.51%); downstream petrochemicals were PP resin (11.89%) and PE resin (7.62%) compared to the same month last year.

**+** **Shipment Index:** The Shipment Index was 116.07 points, expanding by 4.82 percent compared to the same period last year and 0.23 percent from last month. Upstream petrochemicals such as Ethylene and Propylene grew by 22.83 and 19.07 percent, respectively, from the same month last year; downstream petrochemicals such as PS and EPS resins grew by 26.05 and 3.94 percent, respectively, compared to the same period last year.

**+** **Exports:** In June 2021, export was valued at 1,175.63 million USD, increasing from the same month last year by 47.11 percent but decreasing from last month by 3.09 percent. The growth was among upstream petrochemicals such as Vinyl Chloride and Ethylene (38.89%); downstream petrochemicals (49.56%), such as PET and PE resins.

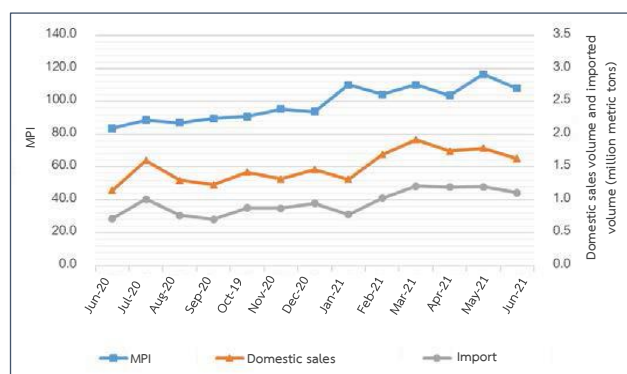


Source: Office of the Permanent Secretary, Ministry of Commerce

**+** **Imports:** In June 2021, imports increased by 100.92 percent compared to the same period last year to 621.61 million USD and increased by 6.55 percent from last month. The increase was among upstream petrochemical products (147.60%), such as Styrene and downstream petrochemical products (93.90%), such as PET and PP resins. The growth was partly due to the price level that began to increase following the level of crude oil prices.

**Forecast trends for July 2021:** The overall industry is projected to expand compared to the same period last year due to the resume of production in many products, along with the rise in global crude oil prices and the economic recovery after the COVID-19 outbreak. As a result, production and export tend to increase accordingly.

## 8. Iron and Steel Industry



Source: The Office of Industrial Economics / Iron and Steel Institute of Thailand

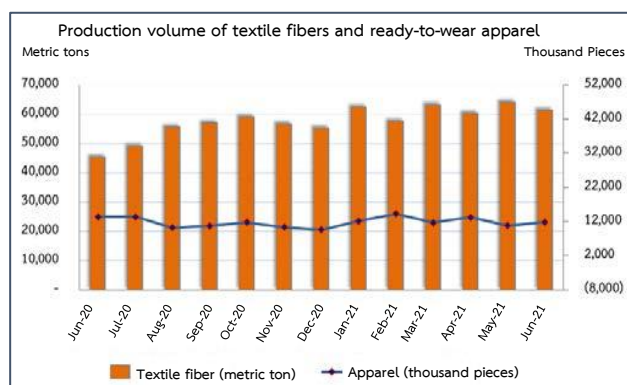
**+** In June 2021, the manufacturing production index was 107.9 points, increasing from the same period last year by 28.9 percent. The increase was in line with the continued recovery of downstream industries, such as the automotive, electrical, and electronics industries; consequently, manufacturers accelerated the production following the increased orders from customers. When considering key products (long and flat products) the MPI of both products increased, whereby the MPI of long products grew 22.4 percent to 107.9 points from products, namely high tensile wires (50.8%), followed by hot-rolled structural steel sections (36.5%) and wires (29.0%). Likewise, the MPI of flat products increased by 56.5 percent to 116.7 points, which increased from products, such as Chromium-coated sheets (140.4%), followed by galvanized sheets (123.7%) and cold-rolled sheets (97.3%).

**+** In June 2021, domestic consumption reached 1.6 million metric tons, increasing from the same period last year by 42.6 percent. Consumption of long products increased by 38.3 percent to 0.5 million metric tons from rebars and hot-rolled structural steel sections (77.2%) and wire rods (15.1%). As for flat products, the consumption reached 1.1 million metric tons, an increase of 44.7 percent from cold-rolled sheets (104.2%), followed by hot-rolled sheets (54.0%) and galvanized sheets (36.1%).

**+** In June 2021, imports reached 1.1 million metric tons, an increase of 55.1 percent compared to the same period last year. Imports of long products reached 0.2 million tons, as increase of 22.1 percent, from hot-rolled structural alloy steel sections (135.3%), followed by carbon steel ingots (104.8%) and cold-finished steel bars (60.7%). Imports of flat products reached 0.9 million metric tons, a growth of 65.1 percent. Flat products that increased in imports were hot-rolled alloy steel sheets (174.6%), followed by hot-rolled stainless-steel sheets (171.0%).

*“Iron and steel industry outlook in July 2021: It is expected that production will slightly increase compared to the same period last year with supporting factors from the expansion of downstream industry. However, the continuously rising prices of steel and raw materials affect the costs of manufacturers and consumers. In addition, key issues that should be monitored include the international price of iron products and the situation of the COVID-19 outbreak. Such issues will affect the production and consumption of domestic steel products.”*

## 9. Textile and Wearing Apparel Industry



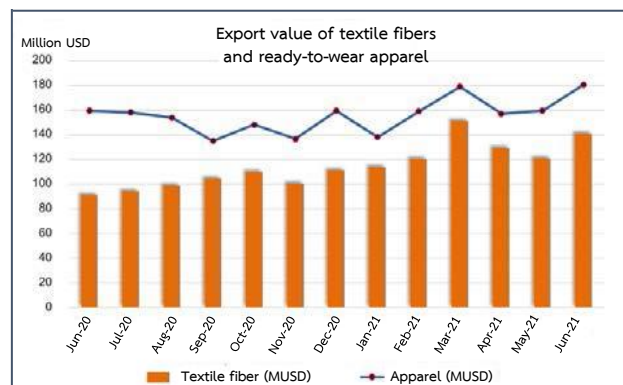
Source: The Office of Industrial Economics

### Production

➕ Production of textile fibers and fabrics grew by 35.31 percent and 33.73 percent (%YoY), respectively. The growth was mainly due to last year's low base impacted by the first wave of the COVID-19 outbreak as Thailand and trading partners implemented control measures. Furthermore, some businesses were temporarily shut down due to a decrease in consumer demand. In addition, the industry gained momentum from exports to trading partners that started to recover, such as the US, Japan, and Vietnam. As for ready-to-wear apparel, the production continued to fall by 11.15 percent from the decreased purchasing power of domestic consumers impacted by the latest outbreak, despite garment exports expanding for the fourth consecutive month in key markets, such as the US, Japan, Hong Kong, and the UK.

### Domestic sales

➕ Domestic sales of textile fibers, fabrics, and ready-to-wear apparel grew by 36.12, 19.10, and 7.87 percent (%YoY), respectively, from the low base last year affected by the first wave of the COVID-19 outbreak. In addition, the demand for raw materials for export returned to expand in many countries where the COVID-19 outbreak has eased.



Source: Ministry of Commerce

### Exports

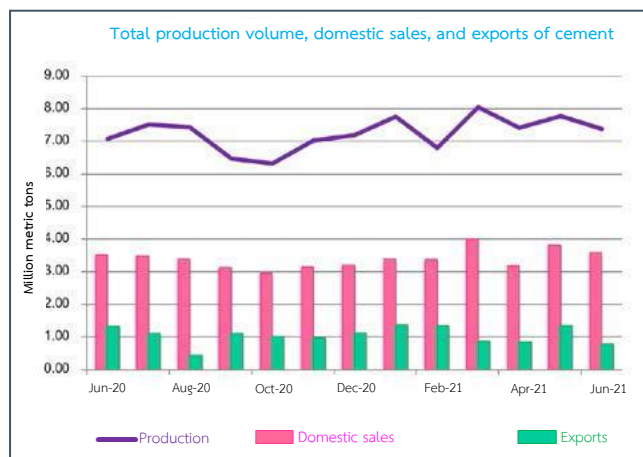
➕ Exports of textile fibers, fabrics and ready-to-wear apparel had recovered throughout the supply chain and the value increased by 54.73, 39.64, and 13.28 percent (%YoY), respectively. The increase was due to last year's low export base impacted by the COVID-19 outbreak causing many countries to slow down their orders. In addition, there were transportation issues due to pandemic control measures implemented by Thailand and trading partners. Nevertheless, in June, the outbreak situation improved for major trading partners, and the economic recovery caused exports to grow, especially in key markets like the US, Japan, and Vietnam.

### Industry outlook for July 2021

The textile industry is expected to grow from the previous year's low base, coupled with continual foreign orders throughout the supply chain. Meanwhile, the apparel industry is likely to slow down as the domestic purchasing power declines due to the intensified COVID-19 outbreak. Furthermore, the industry has been affected by the cluster outbreak in textile and garment factories and supply chains, causing adjusted production lines and some postponed deliveries, but a small proportion compared to the overall market. Therefore, it may affect the overall production and exports slightly. Meanwhile, foreign demand for clothing continued to increase, especially among key trading partners whose economies started to recover, such as China, the US, and some parts of Europe.



## 10. Cement Industry



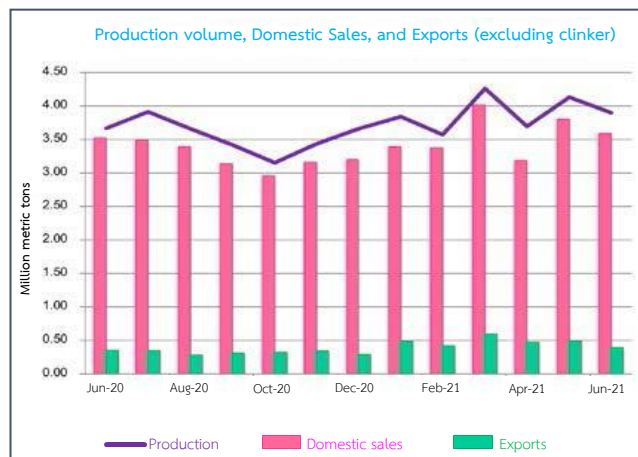
Source: 1. Domestic production and sales volume: Division of Industrial Economics Information and Indices, The Office of Industrial Economics  
2. Export volume: Information and Communication Technology Center, Office of the Permanent Secretary, Ministry of Commerce.

**+** In June 2021, total production of cement reached 7.38 million metric tons, decreasing from May 2021 by 5.15 percent (%MoM), but increasing from the same month of the previous year by 4.43 percent (%YoY).

**+** In June 2021, total domestic sales of cement decreased by 5.59 percent (%MoM) from May 2021 to 3.60 million metric tons but increased from the same month last year by 2.19 percent (%YoY).

**-** In June 2021, total exports of cement reached 0.78 million metric tons, a decrease of 42.74 percent (%MoM) from May 2021 and a decrease of 41.38 percent (%YoY) from the same month of last year. This resulted from a relatively large decline in the Philippines, Cambodia, and non-ASEAN export markets.

**Forecasts and trends:** Overall cement industry in July 2021 compared to the same period last year is expected to contract from the spread of the COVID-19 into many construction sites, to the extent that the government has implemented quasi-lockdown measures to stop construction in risk areas.”



Source: 1. Domestic production and sales volume: Division of Industrial Economics Information and Indices, The Office of Industrial Economics  
2. Export volume: Information and Communication Technology Center, Office of the Permanent Secretary, Ministry of Commerce.

**+** In June 2021, cement production (excluding clinker) decreased by 5.58 percent (%MoM) from May 2021 to 3.90 million metric tons but increased by 6.48 percent (%YoY) from the same month last year.

**+** In June 2021, domestic sales of cement (excluding clinker) reached 3.59 million metric tons, decreasing from May 2021 by 5.56 percent (%MoM) but increasing from the same month last year by 1.86 percent (%YoY).

**+** In June 2021, cement exports (excluding clinker) reached 0.39 million metric tons, decreasing from May 2021 by 20.19 percent (%MoM). However, exports remained on the rise from the same month last year by 9.82 percent (%YoY), from a relatively large increase in orders (excluding clinker) from the Vietnam market.

**Forecasts and trends:** The cement manufacturing industry (excluding clinker) in July 2021 compared to the same period last year is expected to contract from the spread of the COVID-19 into the construction site of a large state-owned project, which is now the country's major cement consumer.