



Value Chain Analysis for Thai Home Textiles Silk Sub-sector



EU-Thailand Thai Home Textiles Project
A project co-financed by the European Union



Table of Contents

1.	Introduction	6
1.1	Background & Rationale of the Project	6
1.2	Project Approach	6
2.	Basic Sub-sector Features	8
2.1	Background of the Development of the Silk sector in Thailand	8
2.2	Government policies for the Silk Sub-sector	10
2.3	General Issues - Silk	12
2.4	Features of Silk	17
2.5	General Issues - Home Textiles	26
2.6	Features of Home Textiles	28
3.	Market Analysis	32
3.1	World Production & Trade	32
3.2	Demand & EU Market	35
3.3	Thailand's Export Market	42
3.4	Future Trend	48
4.	Industry Structure	51
4.1	Silkworm Egg Suppliers	52
4.2	Rearers	55
4.3	Reelers	59
4.4	Yarn & Fabric Traders	60
4.5	Dyers	60
4.6	Weavers	61
4.7	Printers	62
4.8	Home Textile Producers	62
4.9	Trading Agencies / Exporters	64
4.10	Traders / Domestic Wholesalers	64
4.11	Local Retail Outlets	65
4.12	Supplying Industry	66

5.	Related Institutions & Efforts	68
5.1	Institutions	68
5.2	Private Organizations	75
5.3	Government Initiatives taken to promote the Silk Sub-sector	78
6.	Value Chain Analysis	80
7.	Competitive Advantages & Sector Strategies	84
7.1	General Review in Thailand	84
7.2	Competitive Analysis	91
7.3	Summary of Competitors	94
7.4	Competitive Strategy	99
8.	Constraints & Opportunities	102
8.1	Rearers	102
8.2	Pre-processors	106
8.3	Home Textile Producers	108
8.4	Trading Agencies / Exporters	109
8.5	Sector-wide Issues	111
9.	Sub-sector Constraints / Opportunity Analysis	117
10.	Intervention Design	120
10.1	Introduction & Background	120
10.2	Provision of & Satisfaction with existing Services	121
10.3	Initial Scope & Ideas for Intervention	127
11.	Annexes	138
11.1	List of Interviews	138
11.2	Key Benchmarks of Thai Home Textile vis-à-vis Competitors	139
11.3	Thai Silk Exports in 2006 classified by HS. Code	145
11.4	Term Description	150
11.5	Basic Introduction - TLS 8001-2003	151
11.6	Advantages & Disadvantages of Contract Farming	154
11.7	List of Home Textile Testing	155
11.8	Sources	156