

Research Report of China's Textile Industry, 2009

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Textile products mainly contain cotton, bast, wool, silk, chemical fiber and some primary dyeing and printing products. Thus analysis and research of the textile industry will focus on the industrial chain of these products and development trend of related industries.

Actually, the textile industry mainly involves processing such raw materials as cotton, wool and silk and materials for daily necessities like clothes and so on. The industry which is closely linked to both the textile industry and the chemical industry is the chemical fiber textile industry, especially the man-made chemical fiber textile industry. In addition, the process of dyeing and printing may use many chemical instruments.

The textile industry plays a significant role in China's national economy. On one hand, the textile industry is a traditional advantageous industry in China and textile products serve as important foreign trade goods. On the other hand, development of the textile industry will be a major factor affecting demands, supplies and prices of the costume industry.

Due to the aggravating financial crisis and the gloomy global economy, China's textile industry begins to see a depression and its output value represents a downtrend.

From January to December of 2008, the total export value of China's textile industry stood at 65.406 billion USD, a year-on-year increase of 16.6 percent and a link-relative-ratio decrease of 1.5 percent. The growth rate of export value saw an apparent slip in 2008. Textile export in February and November of 2008 both witnessed a year-on-year reduction, with export in December the same as that of 2007. It can be implied that although China adjusted export tax rebate twice in the second half of 2008, the export of the textile industry did not show an obvious improvement.

In spite of the gloomy export market, China's textile industry still represents surplus. The surplus in 2008 reached 49.171 billion USD. Import and export changes in these five years show that the surplus of the textile industry in China sees an uptrend.

Due to fluctuating prices of raw materials, tight policies and the gloomy foreign trade market, China's textile industry was in depression in 2008 and many enterprises suffered great pressure. However, it is predicted that China's textile industry will see a recovery in 2009.

Since the second half of 2008, Chinese government has issued many favorable policies to foster the textile industry. "Revitalization Plans for the Textile Industry" was passed in early 2009. All these policies greatly support the recovery of the textile industry in aspects of capitals, trade environment, etc. Rising export tax rebates also encourage textile enterprises and lift profits of the whole industry. Therefore, the policy is expected to be the major factor stimulating the recovery of China's textile industry in 2009.

The rapid development of China's economy, increasing demands and favorable policies all contribute to the improvement of the textile industry. However, some adverse factors and risks also exist. These risks mainly include rising costs, uncertainty of demands of downstream market and so on.

In 2009, development of China's textile industry will mainly rely on government's policies which help reduce

risks of the whole industry be means of industrial plan and concentration. Most risks come from increasing labor costs and stricter environment-protection requirements listed on "Law of the People's Republic of China on Employment Contracts". Labor always serves as an important advantage for China's textile industry. The requirement of raising wages will lead to an increase of 5 percent in labor cost. However, China's textile industry, whose sales profit rate can not reach 5 percent, will suffer more pressure. Energy-saving policies set limitations to output and water emission, which also imposes great pressure on enterprises.

The demand and supply of the textile industry in China shows that domestic demands will serve as the major factor stimulating development of the textile industry. Thus risks are mainly from export demands. Although the textile industry has seen a recovery since the second half of 2008 due to the rising export tax rebates, international trade environment does not clear up and risks still exist as the growth of global economy slows down and demand for costume slumps. Meanwhile, trade barriers and environment-protection requirements will affect the export of China's textile industry and further exacerbate competition on textile market. The overall situation of the textile industry shows that risks in 2009 are mainly from gloomy demands for textile products.

Readers can get more information as follows:

- Present Sate of China's Textile Industry
- Present Sate of Sub-sectors of China's Textile Industry
- Import and Export of China's Textile Industry
- Major Enterprises and Their Operations of China's Textile Industry
- Influences of Global Financial Crisis on China's Textile Industry
- Risks for China's Textile Industry
- Policy Environment of China's Textile Industry
- Development Trend Forecast of China's Textile Industry

Table of Content

1 BRIEF INTRODUCTION OF CHINA'S TEXTILE INDUSTRY

1.1 Definition and Positioning of The textile industry

1.1.1 Definition

1.1.2 Status

1.2 Categories of The textile industry

2 DEVELOPMENT ANALYSIS OF CHINA'S TEXTILE INDUSTRY, 2008

2.1 PEST Analysis of the Textile Industry, 2008

2.1.1 Economic Environment

2.1.2 Policy Environment

2.1.3 Social Environment

2.1.4 Technological Environment

2.2 Development Analysis of the Textile Industry, 2008

2.2.1 Operation and Features

2.2.2 Investment

2.2.3 Industrial Concentration

2.2.4 Energy-saving and Emission Reduction

2.2.5 Economic State

2.2.6 Product Structures

2.2.7 Correlation between the Textile Industry and the Macro Economy

2.2.8 Life Cycle

2.3 Global Market and Exp-Imp Analysis of the Textile Industry, 2008

- 2.3.1 Global Market
- 2.3.2 Export and Import
- 2.3.3 Global Trade Policies
- 2.3.4 Development Trend

2.4 Competition Analysis of the Textile Industry, 2008

- 2.4.1 Entry and Exit Barriers
- 2.4.2 Competition Structures
- 2.4.3 Substitutes

2.5 Regional Development Analysis of the Textile Industry, 2008

- 2.5.1 Major Regions
- 2.5.2 North China
- 2.5.3 Northeast Areas
- 2.5.4 East China
- 2.5.5 Mid-South Areas
- 2.5.6 Southwest Areas
- 2.5.7 Northwest Areas
- 2.5.8 Comparison

3 ANALYSIS OF INDUSTRIAL CHAINS AND SUB-SECTOR DEVELOPMENT OF CHINA'S TEXTILE INDUSTRY, 2008

3.1 Industrial Chains

- 3.1.1 Chemical Fiber Industry
- 3.1.2 Spinning Costume Industry

3.2 Sub-sectors

- 3.2.1 the Cotton Textile Industry
- 3.2.2 the Wool Textile Industry
- 3.2.3 the Bast Textile Industry
- 3.2.4 the Silk Textile Industry
- 3.2.5 the End-product Industry
- 3.2.6 the Knitted Product Industry

3.3 Influences of Global Financial Crisis on China's Textile Industry

- 3.3.1 Short-term Influences
- 3.3.2 Long-term Influences

4 FINANCIAL SITUATION ANALYSIS OF CHINA'S TEXTILE INDUSTRY, 2008

4.1 Benefit

- 4.2 Profitability
- 4.3 Operating Capacity
- 4.4 Debt-paying Ability
- 4.5 Development Capacity
- 4.6 Overall Financial Situation

5 MAJOR ENTERPRISES ANALYSIS OF CHINA'S TEXTILE INDUSTRY, 2008

5.1 Major Listed Companies

5.2 Luthai Textile Co., Ltd

- 5.2.1 Brief Introduction
- 5.2.2 Structural Diagram of Equity
- 5.2.3 Operation
- 5.2.4 Operation Strategies and Development Strategies
- 5.2.5 SWOT Analysis
- 5.2.6 Competitiveness

- 5.3 Sunvim Group Co., Ltd
 - 5.3.1 Brief Introduction
 - 5.3.2 Structural Diagram of Equity
 - 5.3.3 Operation
 - 5.3.4 Operation Strategies and Development Strategies
 - 5.3.5 SWOT Analysis
 - 5.3.6 Competitiveness
- 5.4 Jiangsu Sunshine Group
 - 5.4.1 Brief Introduction
 - 5.4.2 Structural Diagram of Equity
 - 5.4.3 Operation
 - 5.4.4 Operation Strategies and Development Strategies
 - 5.4.5 SWOT Analysis
 - 5.4.6 Competitiveness
- 5.5 Shanghai Shenda Co., Ltd
 - 5.5.1 Brief Introduction
 - 5.5.2 Structural Diagram of Equity
 - 5.5.3 Operation
 - 5.5.4 Operation Strategies and Development Strategies
 - 5.5.5 SWOT Analysis
 - 5.5.6 Competitiveness

6 DEVELOPMENT TREND FORECAST OF CHINA'S TEXTILE INDUSTRY, 2009-2010

- 6.1 Policy Trend
- 6.2 Cost and Price Trend
- 6.3 Demand and Supply Trend
- 6.4 Import and Export Trend
- 6.5 Technology Trend
 - 6.5.1 New Materials and Advanced Processing Technologies
 - 6.5.2 Spinning, Weaving and Dyeing Technologies
 - 6.5.3 Environment-protective Processing Technologies
 - 6.5.4 Informationization and Quick-response Technologies
- 6.6 Competition Trend
 - 6.6.1 Future Risks Mainly Come From Decreasing Demands
 - 6.6.2 Technological Innovation will be the Center of Future Competition
 - 6.6.3 Extension of Industrial Chains will Reduce Risks
- 6.7 Regional Development Trend
- 6.8 Product Development Trend
- 6.9 Financial Indicator Trend

7 RISK ANALYSIS OF CHINA'S TEXTILE INDUSTRY

- 7.1 Policies
- 7.2 Macro-Economy
- 7.3 Technologies
- 7.4 Demands and Supplies
- 7.5 Raw Materials
- 7.6 Related Industries
- 7.7 Regions
- 7.8 Product Structures
- 7.9 Countries

8 INVESTMENT AND DEVELOPMENT ANALYSIS OF CHINA'S TEXTILE INDUSTRY

- 8.1 Overall Analysis
- 8.2 Encouraged
- 8.3 Permitted
- 8.4 Limited
- 8.5 Withdrawn

SELECTED CHARTS:

- Chart Proportion Occupied by Output Value of China's Textile Industry in GDP
- Chart Labor Productivity Analysis of China's Textile Industry, 2004-2008
- Chart Mergers and Acquisitions of China's Textile Industry, 2008
- Chart Concentration Degrees of China's Textile Industry, 2004-2008
- Chart Life Cycle of China's Textile Industry
- Chart Regional Distributions of Enterprises of China's Textile Industry, 2004-2008
- Chart Production of Textile Products in East China, 2008
- Chart Scale Indicator Proportions of the Textile Industry in Mid-south Areas, 2004-2008
- Chart Financial Indicators of Chemical Fiber Industry, 2004-2008
- Chart Financial Indicators of China's Costume Industry, 2004-2008
- Chart Scale Indicators of China's Cotton Textile Industry, 2004-2008
- Chart Scale Indicators of China's Bast Fiber Industry, 2004-2008
- Chart Operation of Luthai Textile Co., Ltd, 2008
- Chart SWOT Analysis of Luthai Textile Co., Ltd
- Chart Export Values of China's Textile Industry, 2004-2008
- Chart Industrial Chain Analysis of China's Textile Industry
- Chart Outputs of China's Chemical Fiber, 2004-2008
- Chart Outputs of China's Wool, 2004-2008
- Chart Outputs of China's Stuff, 2004-2008

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