

A-Share Listed Garment and Home Textile Companies - Profiles and Financial Data

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Abstracts

China's 1.3 billion population has formed a huge garment market. The sales channel of garment in China has shifted from department stores, exclusive shops and rural fairs into warehouse stores, supermarket and chain sales, professional garment market, mail order, television sales and online sales.

CRI market research shows that in 2016, the retail sales of garment products in China reached CNY 1.02 trillion, up by 6% YOY compared to 2015. At present, the high-end garment market in China is dominated by foreign brands from France, Germany, Italy, Japan, the U.K. and South Korea. The mid-end market is mainly Hong Kong and Taiwan brands, while the mid-low end market is mainly local brands.

According to CRI, the segmentation of women's garment market in China is at a very high level with fierce competition. Women's garment brands in China have gradually established a well-developed structure covering from the high-end to the low-end. In comparison, men's garment market is in the growth stage. It is estimated that from 2017 to 2021, the CAGR of sales value of Chinese men's garment market will exceed 10%. In 2016, the market size of children's wear in China was over CNY 100 billion, with an annual growth rate of 8%. It is estimated that in the next few years, with the loosening of birth control policy by the Chinese government, the growth rate of children's wear market will increase. Chinese garment market has been growing at a relatively low rate in recent years. However, segment markets such as fast fashion and online sales are developing fast.

CRI research indicates that in recent years, Chinese household textile industry remain has been developing slowly. In 2016, the overall growth rate of Chinese household textile industry was no more than 4%. There is a trend that more and more enterprises

are transiting into "Integrated home solution provider" within the Chinese home textile industry. First, the channel terminal displays a whole set of designs including curtain, sofa, bedding, wall paper, decoration and furniture. It appeals to consumers more than the single product show. Second, "big house" provides different types of household products and combination of household styles following the change of seasons and fashion. It gives consumers more choices and match in order to increase the associated purchase rate. Third, the home textile industry is engaged in deep cooperation with ceramic and furniture industries and receives good profits through mutual support and resource sharing.

It is estimated that the garment and home textile in China

In this report, CRI analyzes 47 garment and home textile enterprises listed in A-share market in China.

The report is composed of two parts: the first part is enterprise profiles and the second part is the operation status of these enterprises in the recent decade (presently 2006 to 2016, we will update it to the latest as time goes by).

The operation status is demonstrated from the following perspectives: (1) financial indexes, such as earnings per share, book value per share (BPS), sales per share, net cash flow per share, return on net worth and debt to asset ratio; (2) indexes on the income statement, such as revenue, operating profit, net profit and EBIT; (3) indexes on the income statement, such as revenue, operating profit, net profit and EBIT; (4) indexes on the balance sheet, such as liquid asset, fixed asset, current liability, non-current liability, capital reserve and shareholders' equity.

(1) Financial Indexes

Earnings per Share

Book Value per Share (BPS)

Sales per Share (SPS)

Net Cash Flow per Share from Operations

Net Cash Flow per Share (CNY)

Return on Net Worth

Net Profit Margin on Total Assets

Return on Invested Capital (ROIC) (%)

Gross Profit Margin on Sales (%)

Net Profit Margin on Sales (%)

EBIT Margin (%)

EBITDA Margin (%)

Debt to Asset Ratio (%)

Total Asset Turnover (times)

Cash/Operating Income Received from Sales of Goods or Services

YOY Growth Rate of Operating Revenue (%)

YOY Growth Rate of Operating Profit (%)

YOY Growth Rate of Net Profit Attributable to Shareholders of Parent Company (%)

(2) Summary of Income Statement

Gross Revenue (CNY, million)

Total Operating Costs (CNY, million)

Revenue (CNY, million)

Operating Profit (CNY, million)

Total Profit (CNY, million)

Net Profit (CNY, million)

Net Profit Attributable to Shareholders of Parent Company (CNY, million)

Non-recurring Items (CNY, million)

Net Profit Deducting Non-recurring Items (CNY, million)

R&D Costs (CNY, million)

Earnings Before Interest and Tax (EBIT) (CNY, million)

Earnings Before Interest, Taxes, Depreciation and Amortization (EBITDA) (CNY, million)

(3) Summary of Balance Sheet

Liquid Asset (CNY, million)

Fixed Asset (CNY, million)

Long-term Equity Investment

Total Assets (CNY, million)

Liquid Liability (CNY, million)

Non-current Liability (CNY, million)

Total Liability (CNY, million)

Capital Reserve (CNY, million)

Surplus Reserve (CNY, million)

Undistributed Profit (CNY, million)

Shareholders' Equity (CNY, million)

Equity Attributable to Shareholders of Parent Company (CNY, million)

(4) Summary of Cash Flow Statement

Cash Received from Sales of Goods and Services (CNY, million)

Cash Flow from Operations (CNY, million)

Cash Paid to Purchase Fixed Assets, Intangible Assets and Other Long-term Assets (CNY, million)

Cash Paid for Investments (CNY, million)

Cash Flow from Investments (CNY, million)

Cash Received from Investors (CNY, million)

Cash Received from Borrowings (CNY, million)

Cash Flow from Financing (CNY, million)

Net Increase of Cash and Cash Equivalents (CNY, million)

Cash and Cash Equivalents, End of Period (CNY, million)

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