

A-Share Listed Wool, Silk and Printing & Dyeing Companies - Profiles and Financial Data

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Abstracts

The textile industry is one of the pillar industries in China. In 2016, the fixed asset investment in textile industry was CNY 664.3 billion, up by 10.7% YOY. The main business income was CNY 4,086.97 billion, up by 3.9% YOY. The textile industry not only creates a large number of jobs but also provides products and services for other industries and gains trade surplus.

The raw material of textiles includes cotton, cashmere, wool, silk, chemical fiber, feather and down. Wool, silk and printing & dyeing industries are segment industries.

Since China joined the WTO, the wool-textile industry has been developing fast. The processing volume of wool in China grew from 37,800 tons in 1978 to about 350,000 to 400,000 tons, accounting for 30% of the global total processing volume. Additionally, the production capacity of Chinese textile industry ranks the first in the world. Since 1992, China has become the largest exporter and manufacturer of wool. The wool-textile industry has three major products. First, about 70% of wool is used for clothing processing, including garment fabrics and wool (knitting fabrics), which are made of fine wool. Second, indoor textiles are mainly blanket, wool blanket and wool quilt, which are made of semi-fine wool. Third, industrial textiles are mainly felted products, which are made of coarse wool.

The silk industry is one of the traditional industries in China. China is the world's largest producer of cocoon, raw silk and silk. Its printing & dyeing silk and garment are also among the top. In 2015, the production volume of raw silk was 172,100 tons, up by 4.7% over 2014 and by 59.4% over 2011. Top5 producing areas were Guangxi, Sichuan, Jiangsu, Zhejiang and Anhui, taking up 80.2% of the total production volume in China.

The printing & dyeing industry is a crucial part of textiles further processing to increase added value. Dyeing and finishing is a sort of processing technique and is the general term for dyeing, printing, finishing and washing of grey fabrics. The technological process includes dyeing, printing and overflowing. The printing & dyeing industry serves as an intermediate segment in the industry chain, providing fabrics for downstream garment manufacturers. The quality of fabrics depends on printing, dyeing and finishing in the textile production chain. The price of high-end fabrics is 30% higher than that of ordinary fabrics.

The printing & dyeing industry is becoming more important because of the demand for functional, environmental friendly and intelligent fabrics. The printing & dyeing industry plays an important role in enhancing the value of textile industry chains. The competition pattern of Chinese printing & dyeing industry is characterized by low industrial concentration rate but high regional concentration rate. Since 2000, the production capacity of printing and dyeing fabrics is gradually focused in five eastern coastal provinces, namely, Zhejiang, Jiangsu, Fujian, Guangdong and Shandong. By the end of 2016, the production volume of these five areas had accounted for over 90% of the total production volume in China. Zhejiang alone accounted for about 60% of the total production volume.

In this report, CRI analyzes 13 wool, silk and printing & dyeing 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)

Depreciation and Amortization (CNY, million)

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