

# Report of Chinese Apparel Industry, 2009

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## Abstracts

Apparel manufacture is intensive-laboring industry. Since the reform and open-up, the textile industry had developed fast and had been the important export department of the industrial products with the merits of abundant work force in China. In recent years, the export advantages of Chinese textile industry had cut down because of the cost enhancement in work force and the increased price in the raw material etc. The international financial crisis further weakened the export competitiveness of Chinese textile industry, facing huge development challenges.

In 2008, the accumulated export revenues of Chinese apparel industry were 119.790 billion USD, up by 4.10% compared with 2007, the export growth speed dropping sharply.

Since the 1990s, China's exports to America and European Union had kept going up without great fluctuation. But the exports to some other countries fluctuated greatly, especially India and Pakistan etc. European, American and Japanese market, accounting for 60% import volumes of the textile clothing in the world, had formed certain dependency on Chinese textile clothing, which could not be easily changed because of the present financial crisis. The international financial crisis did not change the people's demands for the daily necessities, but obliged to the change of consumption structures and habits. The expenditure in the entertainment cut down. The consumers were sensitive to the price. The change of the consumption habits made the medium and high quality clothing industry lose a lot. The consumption structure shifted to the medium and low quality products, making the suppliers of the low-priced clothing obtain more opportunities and accounting for more market share.

It was predicted that the export price of Chinese textile products would decrease. The declining overseas demands would form huge pressure for the export price. Since 2008, the pressure had led most Chinese clothing enterprises to maintain the costs and slight

profits and many enterprises had been in the dilemma. In 2009, the declining demands will persist, forming great pressure for the export price of Chinese textile products. However, the reduction in the price of basic energy and raw materials will provide certain space for the price declining of Chinese export commodities. After September, 2008, the reduction in the price of basic energy and raw materials and demands made the fast drops of PPI. It was predicted that the YOY growth rate of Chinese PPI would probably be the negative value in the whole year of 2009, down by about 3%.

It is predicted that the export volumes of Chinese clothing industry will cut down by 10% compared with 2008.

Since August, 2008, Chinese government had cut down or cancelled the export duty of partial export commodities and increased the export tax rebate rate of the textile products for several times. The exchange rate of RMB against USD probably devalued, which would provide certain space for the reduction in the export price of Chinese Textile products.

On 4th February, 2009, Chinese government approved Adjustment and Revitalization Plan of Textile Industry with the purposes of expanding the exports, increasing employment, increasing farmers' income and promoting the development of urbanization. Chinese governments pointed out that the enterprises should speed up the replacement of backward yield capacity and support the mergers and acquisitions so as to speed up the textile industry revitalization. It is predicted that the concentration of Chinese apparel industry will be enhanced. The outstanding enterprises will develop fast depending on its advantages of capital, customers and risk resistance ability.

The author wrote this report by interviewing the experts in the apparel industry and investigating into partial Chinese apparel enterprises in order to provide some recommendations for the international and Chinese clothing manufacturers, import and export dealers and other people to tide over the economic depression.

More following information can be obtained in this report:

- Production Situation of Chinese Apparel Industry
- Demands of Chinese Apparel Industry
- Imports and Exports of Chinese Apparel Industry
- Influences of International Financial Crisis on Chinese Apparel Industry
- Factors Affecting the Development of Chinese Apparel Industry
- Major Enterprises of Chinese Apparel Industry

- Influences of Adjustment and Revitalization Plan of Textile Industry on Chinese Apparel Industry
- Development Trends of Chinese Apparel Industry

The apparel in this report refers to the various male, female and children clothing by cutting and sewing, used the textiles as the major raw materials.

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