

Research Report on China's Textile Industry, 2012

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Abstracts

In China, the textile industry consists of six sub-industries: cotton, chemical fiber textile and printing and dyeing fine processing; wool dyeing and fine processing; linen textiles; silk fine processing; finished textile product manufacture and knitted and woven product manufacturing.

The textile industry is the China's traditional advantageous industry, playing an important role in the national economy. China is the largest production and export country of textiles and clothes. In 2011, the output value of the textile industry accounted for 7.11% of China's GDP. On one hand, textile products are significant foreign trade products of China, occupying an important position in Chinese foreign trade; on the other hand, as a labor-intensive industry, the textile industry provides China with a lot of occupational opportunities, while as the major raw materials of garments and other daily-used products, the development of textile industry also determines the supply-demand relation and price change of garment industry, and other industries.

In 2009, with the deterioration of economic situation, the Chinese government issued a large number of industrial supporting policies including constant increase of export rebates, Planning on Adjustment and Promotion of Textile Industry, the exemptions and deductions of exit & entry quarantine fee, etc. In 2011, the sales revenue of China's textile industry was CNY 3,277.3 billion, with an increase of 25.68% YOY.

In 2011, both the exports of Chinese textiles and garments comprehensively increased and the export amounts were separately USD 94.71 billion and USD 153.24 billion, respectively increasing by 22.9 % and 18.4%. The growth rate of garment export lagged behind that of textiles.

The price increase becomes the primary factor of the export rise. Since 2011, following

the trend of 2010, the continuous increasing trend of raw material prices in China's market, salary level as well as the rising of loan costs brought by the difficult financing and other factors, cause export enterprises rising prices. Export prices of major varieties of products are on the rise.

For the past years, Chinese textiles hold a stable position in the international market. Even in 2008, with the severe influence of the last-round financial storm, the market shares of Chinese textiles and clothes in EU, the United States and Japan still maintained increasing, but fell in 2011. With the development of China's industrialization and urbanization, the rising living standards of customers and demand levels, the demand for textiles gradually shifts from low to medium-end products to high-end products, fostering the increase of market scale. Under the condition of export pressure, China's domestic market becomes the key market needed to be developed for textile enterprises, which will become the first driving force for the development of textile industry.

In 2011, the import amount of Chinese textiles was USD 19.03 billion, increasing by 7.4% YOY, among which the growth rate of finished textile products was the sharpest, with a rise of 11%. In 2011, the import volume of China's textile raw materials reached 5.108 million tons, with an increase of 7.4% YOY; the import amount was USD 15.33 billion, up by 48.2%. Among them, the import volume of cotton achieved 3.365 million tons, rising by 18.5%, and the import amount was USD 9.47 billion, increasing by 67.4%; the import volume and amount of wool separately increased by 1.3% and 45.7%; the import volume and amount of chemical fiber respectively rose by 3.4% and 26%.

It is predicted that in the coming years, Chinese textile industry will remain the strong advantage globally owing to the perfect industry chain and large domestic market.

More following information can be acquired through this report:

Status Quo of China's Textile Industry

Competition in China's Textile Industry

Investment of China's Textile Industry

Import and Export of China's Textile Industry

Operation of Major Sub-industries of China's Textile Industry

Key Enterprises of China's Textile Industry

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