

Research Report on Chinese Textile Industry, 2010-2011



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In China, the textile industry covers cotton and chemical fiber spinning, printing & dyeing and finishing, wool spinning, printing & dyeing and finishing, bast fiber spinning, silk spinning and finishing, made up textile articles manufacture, knitted fabrics and products manufacture.

With a long history, the textile industry is a traditional competitive industry in China, which plays an important role in the development of the national economy. On one hand, the textiles are the major export goods of China. It plays an important role in Chinese foreign trade all along. On the other hand, the labor-intensive textile industry provides a large quantity of employment opportunities. As textiles are the main raw materials for daily necessities such as garment, the development of the textile industry determines the supply-demand relationship and the price tendency of the garment and other industries.

In 2009, with the aggravation of the economic situation, Chinese government issued an array of industrial supporting policies, including the increase of the export rebate rate, the Adjustment and Revitalization Plan of Textile Industry and Notice on the Exemption and Reduction of Exit-Entry Inspection and Quarantine Expense for Exporting Agricultural Products, Textiles and Garments, etc.

The sales revenue of Chinese textile industry sustained growth since 2005. However, the growth began to slow down since 2007. In 2009, Chinese textile industry realized the sales revenue of CNY 2.01 trillion, rising by 10.32% YOY. However, the growth rate was reduced by 4.43% YOY. This indicates that the influence of the international financial crisis on Chinese textile industry has not been removed yet.

In 2009, the import value of textiles of China reached USD 15.05 billion, dropping by 7.91% YOY. The absolute value was the lowest point of the latest five years. The substantial decline of the import value indicates that Chinese textile industry has not yet recovered from the crisis. The demand in the domestic market transferred from import products to homemade products. In 2009, the export value of Chinese textile amounted to USD 60.03 billion, falling by 8.34% YOY. This is the first time of export value decline in the latest five years. In 2005-2009, the growth rate of the export value maintained the downward trend. In 2009, due to the financial crisis, the global demand was depressed, further aggravating the downward trend.

From the end of 2008 to 2009, Chinese textile industry was confronted with the toughest period of production and operation. Nevertheless, thanks to the revitalization plan, stimulation of domestic demand and the recovery started in 2008H2, the production and operation of Chinese textile industry have taken an upturn. The domestic demand grows rapidly. Though the international textile market recovers slowly, the scale of Chinese textile industry continues to expand. The investment resumes growth with the growth rate reaching 14.8% in 2009.

However, Chinese textile industry is still exposed to various problems: high raw material risk (e.g. violent fluctuation of the prices of petroleum and cotton); great difficulty in recruitment and increasingly high labor cost; growth of environmental protection cost caused by low-carbon economy (e.g. updating of environmental protection technologies and growth of power price); irrational industrial structure, large proportion of small and medium enterprises, low industrial concentration and inadequate risk resistance capacity, etc. Besides, Chinese textile industry shows different development prospects in various regions. Specifically, textile enterprises in the east of China gradually lose the traditional advantages, whereas

enterprises in the central part of China begin to display their competitiveness.

Given the perfect industry chain and huge market, it is forecast that Chinese textile industry will continue to possess advantages in the global market in the coming 5-10 years.

Through this report, readers can acquire more information:

- Status quo of development of Chinese textile industry
- Competition in Chinese textile market
- Investment in Chinese textile industry
- Status quo of technology of Chinese textile industry
- Development of Chinese textile industry by region
- Import and export of Chinese textile industry
- Operation of major sub-industries of Chinese textile industry
- Operation of major enterprises of Chinese textile industry
- Investment opportunities in Chinese textile industry
- Prediction on development prospect of Chinese textile industry

Following persons are recommended to buy this report:

- Textile enterprises
- Garment manufacturers
- Textile traders
- Textile equipment manufacturers
- Investors concerning Chinese textile industry
- Research institutes concerning Chinese textile industry
- Others concerning Chinese textile industry

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