



China Textile Fabric Industry Report, 2011

May 2011

This report

- ◆ **Analyzes the development environment of China textile fabric industry.**
- ◆ **Focuses on the segmented industries, including cotton fabric, woolen fabric, silk fabric, hemp fabric and chemical fiber fabric.**
- ◆ **Highlights the operation of key enterprises in China.**

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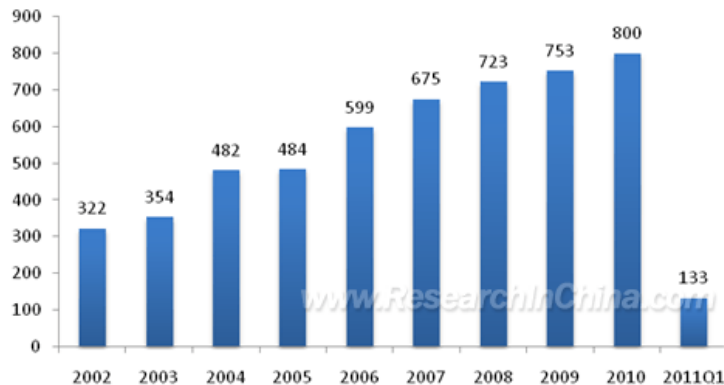
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Abstract

China is the largest producer of cotton, cashmere, flax, and silk, as well as the biggest manufacturer and exporter of textiles in the world. In 2010, the output value of enterprises above the designated size (i.e. with annual sales above RMB5 million) in Chinese textile industry totaled RMB4765 billion, up 12.7% YoY; the export value of fabrics reached US\$35.68 billion, up 30.81% YoY, and the export volume hit 28.83 billion meters, up 17.5% YoY.

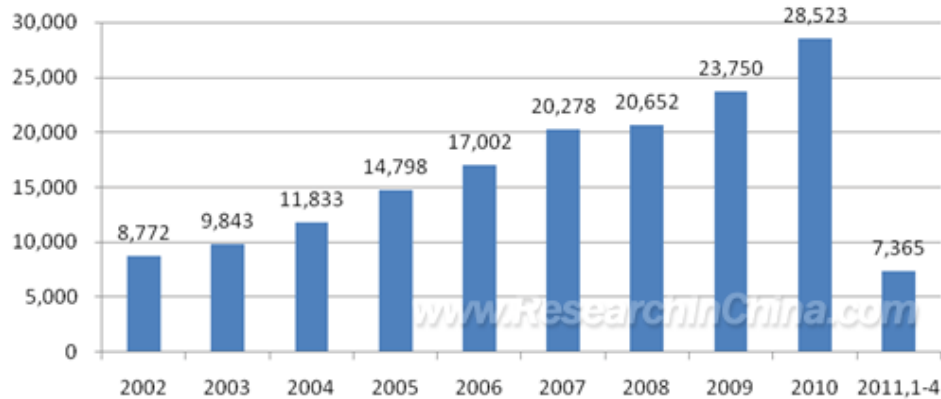
Fabric Output in China, 2002-2011 (Unit: 100M meters)



Subject to factors like the additional costs resulted from the climbing cost of raw materials, technical R&D and innovations as well as exchange rate and trade barriers, the prices of fabrics have been on the rise. In 2010, the price of pure cotton fabric rose approximately 100%, and that of silk fabric expanded more than 30%. The output and sales of textile fabric achieved a rough balance, and the output sales ratio hovered above 99%.

Along with the improvement of people's living standard, the market demand for downstream products like clothes, household articles, and commercial textiles has been increasing despite the rapidly rising prices of textile fabrics; consequently, textile fabric industry still boasts huge development potentiality, and high-quality, healthy, and fashionable products can gain greater market recognition, especially.

Clothing Output in China, 2002-2011 (Unit: mln pieces)



Source: National Bureau of Statistics of China; ResearchInChina

Up to the end of 2010, China had been in possession of over 32,000 textile enterprises, a majority of which had been engaged in textile fabric business. The performances of the manufacturers varied in different market segments.

Cotton Fabric:

Weiqiao Textile Co., Ltd. is the largest cotton fabric manufacturer and textile clothing exporter in China, as well as the cotton fabric enterprise with the most powerful textile capability across the world. It boasts the annual output of 882-kiloton cotton yarn, 1,634 million meters of greige cloth, and 175 million meters of jean.

Woolen Fabric:

Jiangsu Sunshine Co., Ltd., the largest domestic manufacturer of worsted fabric, characterizes the annual output of 18 million meters of worsted wool and 1.20 million suits of top-grade clothing. Its top grade products of above 80S enjoy more than 75% shares in Chinese high-grade fabric market.

Silk Fabric:

Zhejiang Jiaxin Silk Co., Ltd., one of the biggest producers and exporters of silk products in China, features the annual output (processing) of over 20 million meters of printing & dyeing fabric, more than 500 km tating silk, 300-ton knitted silk, over 1 million meters of jet-weaving silk, and 5 million pieces (suits) of clothes.

Hemp Fabric:

Hunan Huasheng Group Corp. is the largest domestic enterprise specializing in the production and export of hemp fabrics and clothes. It boasts the annual output of 55K-spindle long hemp fabric and 50K-spindle cotton fabric, and the annual capacity of 12-kilaton ramie yarn, 32 million meters of greige cloth, 12 million meters of printing & dyeing fabric, and 3 million pieces of clothing.
of 446 kilotons.

Chemical Fiber Fabric:

Jilin Chemical Fiber Group Co., Ltd., one of the most important production bases of chemical fiber raw materials and products in China, possesses the annual capacity of 65-kilaton viscose staple fiber, 22-kilaton viscose filament, 55-kilaton chemical fiber pulps, and 50-kilaton bamboo staple fiber, with the comprehensive production capacity of 446 kilotons.

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