



**China Home Textile Industry Report,
2012-2015**

Apr. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

China home textile industry only has a history of 10 years. From January to November of 2012, 1,831 Chinese home textile enterprises with the annual sales revenue of over RMB20 million achieved the total industrial output value of RMB226.4 billion, showing a year-on-year increase of 14%. In 2012, China home textile industry had the following features:

The domestic market became an important factor for driving the growth of output and sales volume. In the first half of 2012, the domestic output value of the home textile enterprises with the annual sales revenue of over RMB20 million grew by 20.2% year on year. However, the export delivery value only increased by 1.3%. The domestic sales growth rate was much higher than the export growth rate.

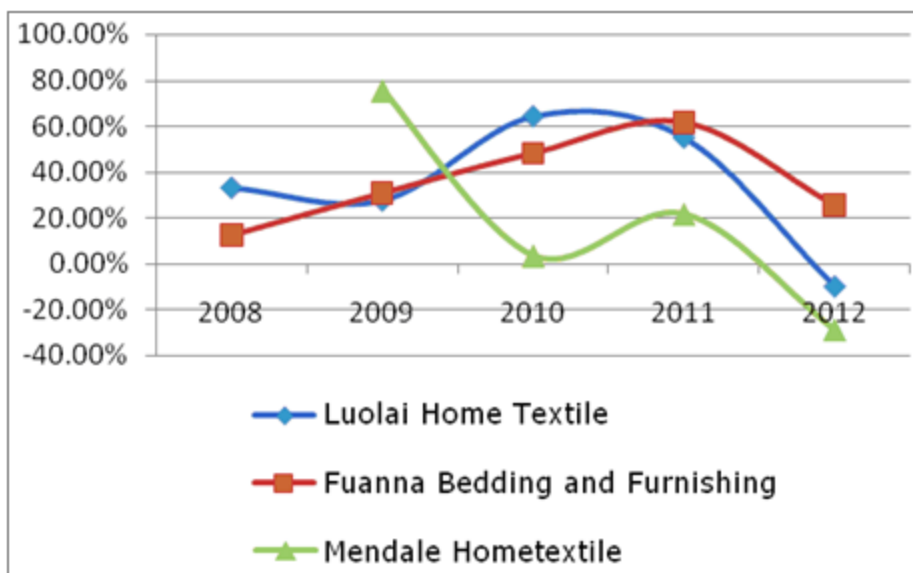
The home textile e-business developed rapidly. Luolai Home Textile achieved sales of RMB90 million from “11.11 Shopping Carnival” in 2012, six times that in the same period of 2011; in 2012, Fuanna Bedding and Furnishing gained the revenue of RMB223 million from e-business, up 117.34% from 2011.

The export to emerging markets witnessed quick growth. From January to November of 2012, the export to the BRIC and ASEAN increased by 19.5% and 18.8% respectively; particularly, the export to Russia rose by 59.9%; the export to ASEAN grew at over 10%.

In 2012, the growth of the performance of major home textile enterprises declined. The profit of some enterprises slumped and the backlog of franchisees remained heavy, mainly due to the rising raw material prices, reduced purchasing power of the end market as well as real estate control policies.

Net Income Growth Rate of Three Major Listed Home Textile Companies in China, 2008-2012

Note: the data of Luolai Home Textile and Mendale Hometextile in 2012 are the data in the first three quarters of 2012



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Source: Luolai Home Textile; Fuanna Bedding and Furnishing; Mendale Hometextile; ResearchInChina China Household Textile Industry Report, 2012-2015

The report includes the following aspects:

1. Operation, market demand and development characteristics of China home textile industry;
2. The export market of China home textile industry;
3. The competition pattern of Chinese home textile market, from the angles of brand, channel and corporate performance;
4. Operation, business models, development strategies and performance prediction of major home textile enterprises in China.

Preface	3. Key Enterprises in China	3.3.7 Strategy
1. Overview of Home Textile Industry	3.1 Luolai Home Textile	3.3.8 Performance Forecast
1.1 Definition	3.1.1 Profile	3.4 Sunvim
1.2 Classification	3.1.2 Development Course	3.4.1 Profile
	3.1.3 Major Brands	3.4.2 Operation
2. Development of China Home Textile Industry	3.1.4 Operation	3.4.3 Revenue Structure
2.1 Global Development	3.1.5 Business Model	3.5 Veken Elite
2.2 Development Course	3.1.6 Revenue Structure	3.5.1 Profile
2.3 Operation	3.1.7 Gross Margin	3.5.2 Operation
2.4 Demand	3.1.8 Strategy	3.5.3 Revenue Structure
2.4.1 Daily Replacement	3.1.9 Performance Forecast	3.5.4 Household Textile Business
2.4.2 Wedding	3.2 Fuanna Bedding and Furnishing	3.5.5 Performance Forecast
2.4.3 Moving into a New Home	3.2.1 Profile	3.6 Shuixing Home Textile
2.5 Export	3.2.2 Development Course	3.7 Beyond Home Textile
2.5.1 Export Value	3.2.3 Major Brands	3.8 Violet Home Textile
2.5.2 Export Destination	3.2.4 Operation	3.8.1 Profile
2.6 Development Characteristics	3.2.5 Business Model	3.8.2 Development Course
2.6.1 Increasing Domestic Sales	3.2.6 Revenue Structure	3.8.3 Business Model
2.6.2 Online Shopping Pushes the Development of Home Textile	3.2.7 Gross Margin	3.9 TEVEL
2.6.3 New Emerging Markets Drive Export	3.2.8 Strategy	3.9.1 Profile
2.6.4 Growth Rate of Enterprises Declines Obviously	3.2.9 Performance Forecast	3.9.2 Development Course
2.7 Competition	3.3 Mendale Hometextile	3.10 Kaisheng Home Textile
2.7.1 Brand Competition	3.3.1 Profile	
2.7.2 Channel Competition	3.3.2 Major Brands	
2.7.3 Performance Contrast among Enterprises	3.3.3 Business Model	
2.8 Development Trends	3.3.4 Operation	
	3.3.5 Revenue Structure	
	3.3.6 Gross Margin	

- Classification of Home Textile
- Development Course of China Home Textile Industry
- Industrial Output Value of Home Textile Enterprises with Annual Sales of over RMB20 Million in China, 2008-2012
- Major Operating Indicators of Home Textile Enterprises with Annual Sales of over RMB20 Million in China, 2009-2012
- Demand Structure of China Home Textile Industry
- Per Capita Annual Consumption Expenditure of Bedding of Urban Households in China, 1995-2011
- Per Capita Disposable Income of Urban Households in China, 1995-2012
- Newborn Population in China, 1949-2011
- Accumulative YoY Growth Rate of Commercial Housing Sales Area in China, 2007-2013
- Export Value and Growth Rate of Home Textile in China, 2008-2012
- Export Value of Home Textile (by Region) in China, 2010-2011
- Export Value and YoY Growth Rate of Chinese Home Textile to New Emerging Countries, 2010-2011
- Export Value of Home Textile (by Region) in China, Jan.-May 2012
- Export Value and YoY Growth Rate of Chinese Home Textile to New Emerging Countries, Jan.-May, 2012
- Domestic and Overseas Sales of Home Textile Enterprises with Annual Sales of over RMB20 Million in China, 2012H1
- E-commerce Layout of Major Home Textile Enterprises in China
- Export Value of Home Textile in China (by Region), 2010-2012
- Revenue YoY Growth Rate of Three Major Listed Home Textile Companies in China, 2008-2012
- Net Income Growth Rate of Three Major Listed Home Textile Companies in China, 2008-2012
- Representative Home Textile Brands (by Region) in China
- Stores Structure of Fuanna Bedding and Furnishing (by Channel), 2008-2012
- Sales Region Distribution of Three Major Listed Home Textile Companies in China, 2011
- Gross Margin of Three Major Listed Home Textile Companies in China, 2008-2012
- Expense Ratio of Three Major Listed Home Textile Companies in China, 2011-2012
- Industrial Output Value of Home Textile Enterprises with Annual Sales of over RMB20 Million in China, 2012-2015E

- Brand Development of Luolai Home Textile
- Development Course of Luolai Home Textile
- Major Brands of Luolai Home Textile
- Revenue and Net Income of Luolai Home Textile, 2008-2012
- Growth Rate of Revenue and Net Income of Luolai Home Textile, 2008-2012
- Number of Stores of Luolai Home Textile, 2007-2012
- Development Course of Order System of Luolai Home Textile
- Revenue Structure of Luolai Home Textile (by Brand), 2006-2012
- Revenue Structure of Luolai Home Textile (by Product), 2012H1
- Revenue Structure of Luolai Home Textile (by Region), 2008-2012
- Gross Margin of Main Brand Products of Luolai Home Textile, 2008-2012
- Extension & Expansion Strategy of Luolai Home Textile
- Revenue and Net Income of Luolai Home Textile, 2012-2015E
- Development Course of Fuanna Bedding and Furnishing
- Major Brands of Fuanna Bedding and Furnishing
- Revenue and Net Income of Fuanna Bedding and Furnishing, 2008-2012
- Growth Rate of Revenue and Net Income of Fuanna Bedding and Furnishing, 2008-2012
- Direct Channels and Franchised Channels of Fuanna Bedding and Furnishing, 2008-2012
- Revenue Structure of Fuanna Bedding and Furnishing (by Brand), 2008-2011
- Revenue Structure of Fuanna Bedding and Furnishing (by Product), 2012
- Revenue Structure of Fuanna Bedding and Furnishing (by Region), 2008-2012
- Consolidated Gross Margin of Fuanna Bedding and Furnishing, 2008-2012
- Revenue and Net Income of Fuanna Bedding and Furnishing, 2012-2015E
- Major Brands of Mendale Hometextile

- Revenue of Mendale Hometextile (by Channel), 2009-2011
- Revenue and Net Income of Mendale Hometextile, 2009-2012
- Revenue Structure of Mendale Hometextile (by Brand), 2009-2012
- Revenue Structure of Mendale Hometextile (by Region), 2009-2012
- Gross Margin of Mendale Hometextile, 2009-2012
- Revenue and Net Income of Mendale Hometextile, 2012-2015E
- Revenue and Net Income of Sunvim, 2008-2012
- Gross Margin of Household Textile Products of Sunvim, 2008-2012
- Operating Revenue Structure of Sunvim (by Product), 2008-2012
- Revenue Structure of Sunvim (by Region), 2008-2012
- Revenue and Net Income of Veken Elite, 2008-2012
- Revenue of Veken Elite (by Product), 2008-2012
- Revenue of Veken Elite (by Region), 2008-2012
- Gross Margin of Household Textile Products of Veken Elite, 2008-2012
- Revenue and Net Income of Veken, 2013-2015E
- Development Course of Shuixing Home Textile
- Main Brands of Violet Home Textile
- Development Course of Violet Home Textile
- Development Course of TEVEL

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