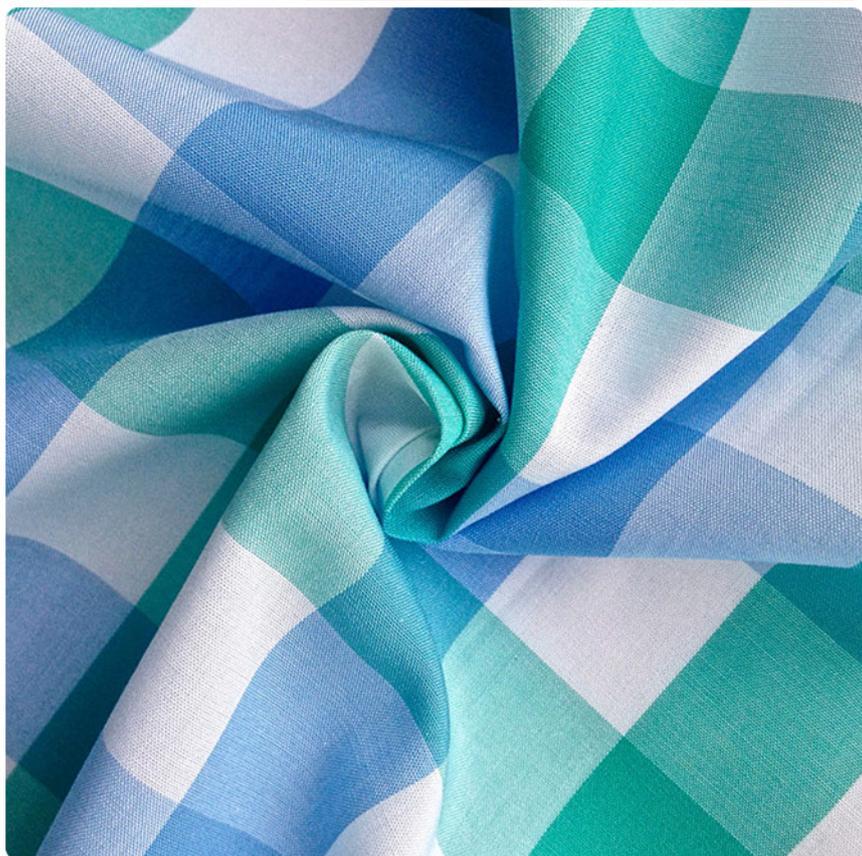
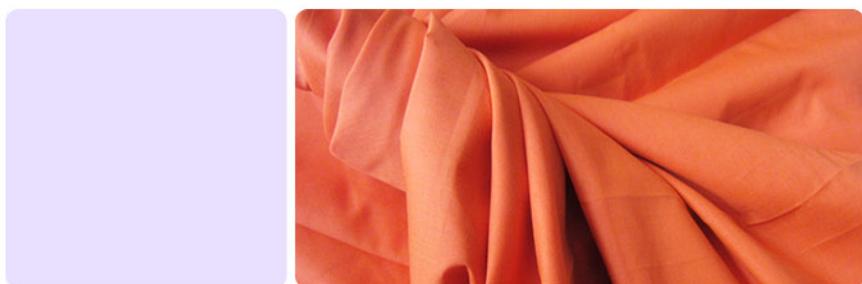


Cotton

Industry Analysis Report

2013.08



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Produced by IAR Team
Focus Technology Co., Ltd.

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Abstract

China is the first exporter of cotton. In 2012, china's export value accounted for 22.3% of the world's total cotton exports, with a decrease of 4.2%, followed by India, accounting for 12.9% and with an increase of 9.9%.

1. Textile Industry Overview

Textile and apparel is an important traditional and people's livelihood industry. In the development process of the information and digital social, the traditional industry face survival pressure, less competitive market, if it doesn't change, it will face a major survival test.

Looking at the world today, the textile and apparel industry is no longer a pillar industry of the national economy, if any, is different from the traditional textile and apparel industry. Developed countries output processing technology by "brand strategy" to pass on the cost pressure, making the developing countries as their factory and production base. China, as a big country of textile and apparel, is now taking the same path with the developed countries to output devices to Asia, North Africa and some countries and regions of Southeast Asia to set up factories and production base. Capital output to value and we are looking for new profits after the gradual disappearance of the local labor cost advantage.

Although in 2012 the development of the textile industry is growing, but the United States and the European Union's market share is reducing, which can further illustrates that the international competitiveness of China's textile industry is decreasing. Problems encountered previously exported mainly caused by shrinking international market, from a domestic point of view, mainly due to the rising costs of production factors, labor costs, raw material costs and other factors.

2013 will still be a relatively smooth year and will be presented first low to high situation, which mainly caused by the new economic policy impact on the industry, while exports will also maintain a difficult running. With the growth of domestic demand, the textile industry still has a tendency to go up.

2. China Cotton Major Exporting Source Area

- China Cotton (HS: 52) Major Exporting Source Area (By Export Value) from Jan. to April in 2013

Region	Volume in Proportion	Value in Proportion	Year on Year	
			Volume	Value
Shandong	29.3%	26.0%	18.5%	23.3%
Zhejiang	22.1%	21.8%	11.8%	11.3%
Jiangsu	19.1%	20.8%	20.6%	21.2%
Guangdong	9.2%	12.1%	37.0%	22.4%
Hebei	2.6%	2.7%	107.7%	92.1%

From Jan. to April in 2013, Shandong total export volume of cotton accounted for 29.3% of China's total export volume, and the export value accounted for 26.0% of the total export value; followed by Zhejiang, with export volume accounted for 22.1%.

Source: Customs Information Network

3. Chinese Cotton Industry Main Exporting Countries and Regions

- China Cotton (HS: 52) Main Exporting Countries and Regions Distribution (By Exporting Value) from Jan. to April in 2013

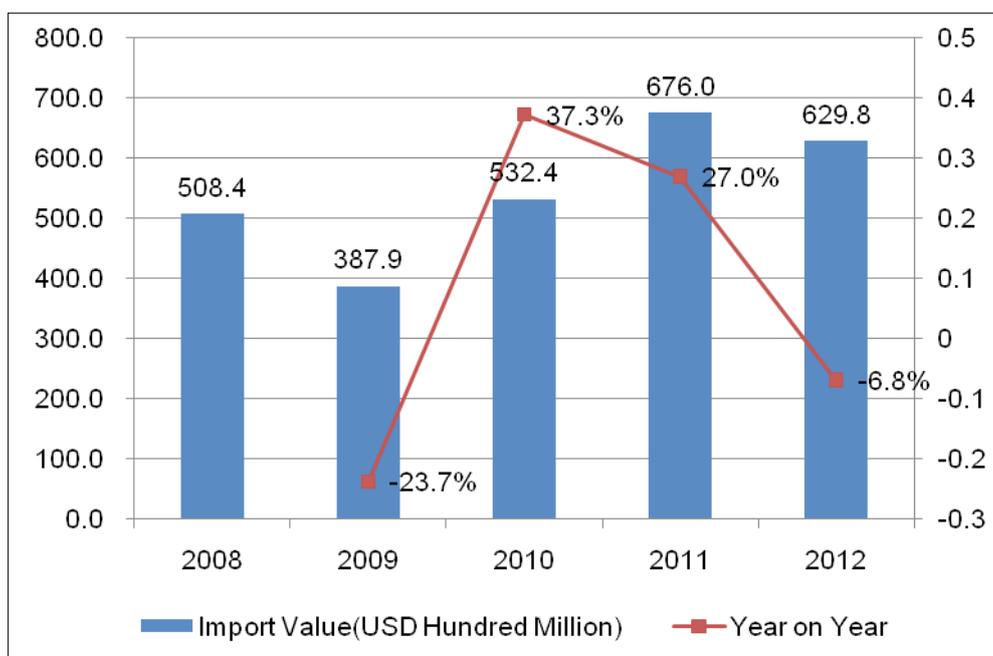
No.	Country / Region	Volume (-)	Value (USD)	Year on Year	
				Volume	Value
1	Hong Kong	356,770,088	1,071,212,429	48.6%	42.0%
2	Vietnam	462,570,410	779,374,153	45.6%	29.0%
3	Bangladesh	322,024,306	732,517,291	48.1%	46.7%
4	Benin	218,737,505	268,952,805	149.7%	133.8%
5	Indonesia	100,125,661	221,907,188	27.3%	23.1%
6	Philippines	110,212,181	196,227,957	24.5%	25.9%
7	Togo	132,604,442	162,201,145	-40.0%	-40.2%
8	Republic of Korea	94,039,054	154,455,228	16.2%	12.0%
9	Kirghizstan	84,300,833	138,602,291	31.1%	45.3%
10	Cambodia	43,538,747	108,894,046	37.9%	34.7%

From Jan. to April in 2013, our major cotton exporting countries and regions are: Hong Kong, Vietnam, Bangladesh, Benin, Indonesia, Philippines, Togo, South Korea, Kyrgyzstan and Cambodia. Among which, there was a larger increase of export value in Benin, with an increase of 133.8% year on year.

Source: Customs Information Network

4. Global Cotton Industry Needs Analysis

4.1. Global Demand Trends of Cotton (HS: 52) from 2008 to 2012



4.2. Global Main Demanding Countries of Cotton (HS: 52) in 2012

Major Importing Countries / Regions	Import Value of 2012 (Hundred Million USD)	Year on Year
China	186.84	26.8%
Bangladesh	45.61	5.8%
Hong Kong	32.86	-7.1%
Vietnam	27.64	1.4%
Indonesia	25.14	-20.7%
Turkey	23.78	-34.1%
Republic of Korea	16.74	-27.2%
Italy	15.12	-33.2%
Germany	13.67	-20.5%
Mexico	12.09	-30.1%

Global import value of cotton in 2012 amounted to 62.98 billion USD, with a decrease of 6.8%.

The major cotton importing countries and regions: China, Bangladesh, Hong Kong, Vietnam, Indonesia, Turkey, South Korea, Italy, Germany and Mexico.

Source: UN COMTRADE

5. Global Cotton Main Exporting Countries/Regions in 2012

- Global Cotton (HS: 52) Main Exporting Countries/Regions in 2012

Major Exporting Countries / Regions	Export Value of 2012 (Thousand USD)	In Proportion	Year on Year
China	14,841,267	22.3%	-4.2%
India	8,568,855	12.9%	9.9%
USA	8,297,705	12.5%	-25.3%
Pakistan	5,225,694	7.9%	2.5%
Hong Kong	3,317,236	5.0%	-7.8%
Australia	2,734,504	4.1%	3.8%
Brazil	2,273,255	3.4%	26.9%
Italy	1,999,488	3.0%	-17.1%
Turkey	1,786,131	2.7%	-7.1%
Germany	1,396,168	2.1%	-15.0%

According to statistics of 2012, China is the first exporter of cotton. China total export value of cotton accounted for 22.3% of the world's total export value, with a decrease of 4.2%; followed by India, with export value accounted for 12.9% and an increase of 9.9% year on year.

Source: UN COMTRADE

The IAR Team of Made-in-China.com dedicates to surveying,excavating and collating industry information for supplying the service of timely and exact information analysis, providing necessary information and dates for clients'decision.

Thanks for reading the report, if you have any questions,opinions or advices, please contact us.

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