

Swimwear



May 2008 US\$395



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SWIMWEAR

Supplier capability in China

EXECUTIVE SUMMARY

The world's largest swimwear exporter, China accounts for about 40 percent of global supply. The country's 3,000 suppliers posted 95 percent sales growth in 2007, shipping out more than 435 million pieces at a value exceeding \$1 billion.

Products are shipped to Europe, North America and Asia, mostly on an OEM basis. Among the major clients are Disney, Wal-Mart, Carrefour, Sears and Kohl's in the US, H&M in Sweden, Tesco and Woolworths in the UK, and Quelle in Germany.

While exports to North America, particularly the US, continue to grow at a healthy rate, shipments to emerging markets such as Russia have been soaring.

The following are some of the key trends we see in China's swimwear industry:

- The US economic slowdown and the lifting of export quotas to the EU are pushing many companies to shift their concentration from the US to the EU, end even to the rest of Europe.
- The stronger value of the yuan against the US dollar, and higher material and labor costs are leading makers to raise export prices in the months ahead. But keen competition is limiting increases to 10 percent.
- The fast appreciation of the yuan is also pushing companies to implement different measures to minimize foreign exchange losses. This includes finalizing orders in currencies other than the US dollar and reducing the validity period of export prices.
- Suppliers will also be investing in R&D capability upgrades under efforts to continue their steady shift to upscale manufacture. Toward the same aim, companies are also purchasing advanced equipment from Japan and the US.
- Makers are enhancing releases with the use of performance fabric, unique prints, beadwork and embroidery.

China makers can offer fashion and competition swimwear for men, women and children. The majority of suppliers specialize in women's lines, although there are companies that do focus on men's models. Very few makers concentrate on children's swimwear. More than 76 percent of the suppliers in this report focus on women's designs and one company devotes all export output to men's models.

The Products & Prices section details both current and upcoming trends for swimwear. The features and prices of each type are discussed according to low end, midrange and high end. This part of the report also presents the types of materials used and where they are sourced.

The Industry Overview discusses the reasons behind the increased concentration on the European market. It elaborates on the industry composition as well, highlighting key characteristics of the different types of suppliers. In addition, this section of the report provides an overview of the country's main manufacturing centers for swimwear.

The majority of swimwear suppliers in China are locally owned, but there are also a number of foreign-owned or invested factories in the country. Reflecting this breakdown, 78 percent of the companies profiled in this report are locally owned and 11 percent carry investments from Hong Kong or Taiwan enterprises.

Swimwear manufacture in China is mostly based in the provinces of Guangdong, Zhejiang and Fujian. The northern province of Liaoning is emerging to become a major hub as well.

To represent the industry accurately, the majority of companies in this report are from these main manufacturing centers, with 47 percent from Guangdong, 21 percent from Zhejiang and 11 percent from Fujian.

In this report

- 14 in-depth company profiles
- 24 short company profiles
- 66 top-selling export products
- Supplier demographics
- Supplier survey
- Industry statistics & charts

METHODOLOGY

To produce this report, Global Sources surveyed a wide range of suppliers. Rather than focus simply on high-profile makers, we compiled a representative sample of large, midsize and emerging manufacturers. All profiled companies are export-oriented professional suppliers that may or may not be clients of Global Sources.

The selection of suppliers is designed to reflect the composition of the industry in China in terms of geographic spread, business type and company ownership.

For each company profile, our research teams interviewed senior executives and export managers who discussed their recent performance and provided price, R&D, production and export forecasts for the next 12 months. The interviews were done in person, by phone or e-mail.

In each case, companies were required to answer specific questions designed to verify their manufacturing and export credentials, including their production and export statistics, and a breakdown of exports by product type and market. Our production checklist details the product-specific manufacturing capabilities of each supplier.

All suppliers participated in a survey designed to provide insight into product and price trends, and challenges facing the industry in the next 12 months. All survey questions are single choice. Results were calculated based on the actual number of valid responses to each question.

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INDUSTRY OVERVIEW

The appreciating value of the yuan against the US dollar and the lifting of export quotas to the EU are leading swimwear suppliers in China to increase their concentration on the European market.

Even with quotas in place, exports to the EU increased 42 percent to \$254 million worth in 2007. Diverse efforts to penetrate the region further are making companies optimistic of at least 10 percent export growth by year-end.

Shipments to the rest of Europe, however, surged almost 300 percent. This comes as the consumer spending power in the emerging markets in Eastern and Central Europe continues to strengthen. Exports of men's and boy's swimwear to Russia, for example, grew 1,444 percent. The country is now the single-largest importer of China-made swimwear for men and boys, and is a close second to the US for women's and girls' models.

To sustain the phenomenal export growth, companies are boosting their efforts to produce value-added designs. Makers are upgrading overall R&D capability and allocating more funds to in-house teams, which are used in acquiring CAD systems, and in conducting material research and sourcing.

Suppliers are hiring foreign designers as well to help them come up with on-trend releases. They are also sending their R&D teams to international trade shows to keep them updated on the latest in fabric, construction and trimmings.

Many are enhancing designs by incorporating value-added features such as performance fabric, better embroidery, special prints and more accessories.

Makers are using fabric from Italy and Spain, and special types of weft-knitted textiles that are more comfortable on the skin.

Suppliers are also adopting heat-sensitive fabric, which change color

when exposed to light and heat, in upscale designs.

Companies are expanding their product lines as well. Those that used to focus almost exclusively on fashion models, for example, now have a line for competition swimwear.

In addition, certain makers are expanding their OBM share of exports. Currently accounting for no more than 7 percent of China's total exports, OBM sales are projected to account for up to 17 percent of turnover by year-end.

To aid in the development of new products and enhance manufacturing capability, these companies are investing in advanced equipment such as Gerber pattern-making machines, plotters and cutters from the US, and automatic printing machines from Japan.

Industry composition

China is the largest exporter of swimwear in the world, accounting for approximately 40 percent of global supply. There are about 3,000 manufacturers, 80 percent of which have export capability.

The majority of swimwear makers in China are midsize companies that have between 300 and 800 workers,

Supplier summary

Suppliers surveyed	38
Export sales	\$103.0mn
Export ratio	89%
OEM business	75%
Capacity utilized	73%
Annual R&D spending	\$11.5mn
Full-time employees	15,895

Data: All surveyed suppliers

and monthly capacity of 200,000 to 400,000 pieces. Many of these suppliers, especially those based in the provinces of Guangdong and Fujian, subcontract production to nearby factories to boost sales during peak months.

Small companies employ less than 300 workers and typically produce an average of 100,000 pieces of swimwear monthly. Based mostly in Quanzhou and Jinjiang in Fujian, Hangzhou in Zhejiang, and Xingcheng in Liaoning province, these suppliers generally manufacture swimwear as their primary line but may also offer other products such as sportswear, particularly during the off-season.

A number of them are newly established makers competing for sales shares. Due to their limited in-house facilities, such suppliers have to search for qualified factories to manage their

Major customers

Company	
Bosheng	Wal-Mart (US)
Dongguan Wanfu	Estoy Corp. (Japan)
Feidu	Target, Disney, Wal-Mart, Kmart (US)
Fujian Hengxia	Carrefour, Sears, Kohl's (US)
Guangzhou Textile Industry Union	New Yorker (Germany); Roots, Wal-Mart (Canada)
Jingzhu Garments	Colmar (Italy)
Lian Hing	H&M (Sweden); George, BHS, Tesco, Woolworths (UK); Quelle, Kmart (Germany)
Qingdao Bright	Adidas (Japan)
Quanzhou Great	The Cookie Co. (Netherlands), Liberty (Denmark)
Quanzhou Longhua	Arden (Canada)
Winsun	Target, Disney (US)

Data: All surveyed suppliers

Feidu Swim Suit Mfy Co. Ltd

Hong Kong-invested Feidu specializes in swimwear. The line accounts for 83 percent of total sales.

All output is exported, 90 percent of which is under OEM. The rest is divided equally between ODM and OBM orders.

Feidu's swimwear is made of 80 to 83 percent nylon blended with 17 to 20 percent spandex or Lycra. Designs in polyester blends are also offered. Prices start at \$3 and can exceed \$4 per piece or set, depending on the material, size, printing technique, trimmings and intricacy of design.

Women's swimwear comes in one-piece and bikini styles. Models with sarongs and miniskirts are available, and priced at about \$4 per set. Designs with padded tops are \$0.70 more expensive than unpadded versions.

The company also offers swimwear with functional treatments such as UV-resistance and quick-dry features.

Ninety percent of raw materials are sourced locally and the rest are

purchased in Italy. Outsourced fabric is sent to Intertek for toxicity testing.

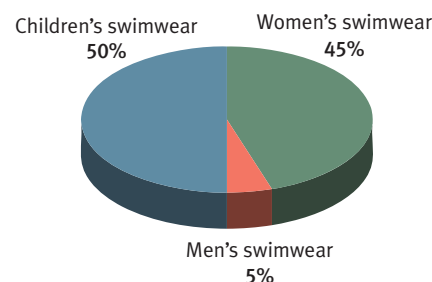
Feidu's QC inspectors carry out spot checks on incoming fabric according to the AQL 4.0 standard. All finished products are examined visually for defects such as broken stitches before packaging.

The company's R&D team, composed of six designers and two pattern and sample makers, releases 10 to 20 new designs each month and finishes countersamples in 10 days. The group currently focuses on patterns and styles. It plans to release more high-end models in coming months.

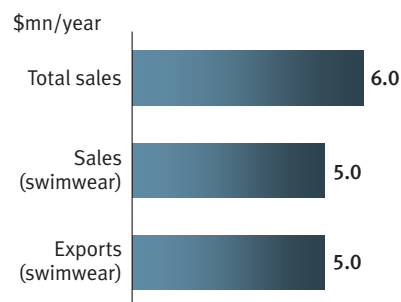
To stay abreast of trends, Feidu attends trade shows in Guangzhou, Shanghai and Hong Kong regularly. It also monitors industry publications and conducts online research.

The company's 6,000sqm factory in Jiangmen, Guangdong province, has a worker dormitory, and administrative and two-story production buildings.

Products made



Sales



Profile

Company facts

Year established	2000
Head office location	Jiangmen (Guangdong)
Business type	Manufacturer: Direct exporter
Ownership	Hong Kong-owned/invested
Factory location(s)	Jiangmen (Guangdong)
Total factory area	6,000sqm
Full-time employees	200
Total annual sales (all products)	\$6.0mn
Annual R&D spending	\$0.05mn
ISO certified	No

Sales & output: Swimwear

Annual sales	\$5.0mn
Share of total sales	83%
Annual export sales	\$5.0mn
Total monthly capacity	180,000 pieces
Average monthly output	120,000 pieces
Capacity utilized	67%
Average monthly exports	120,000 pieces
Export ratio	100%
OEM % of exports	90%
ODM % of exports	5%
OBM % of exports	5%
Major OEM/ODM/OBM customers	Target, Disney, Wal-Mart, Kmart (US)

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Capability**Production checklist**

Sewing machines	140
R&D/design staff	8
QC staff	10
In-house fabric production	No
Cutting machines	7
Needle detectors	1
In-house fabric testing	Yes
Oeko-Tex Standard 100 certification	No

Exports by product

Women's swimwear	45%
Men's swimwear	5%
Children's swimwear	50%

Exports by market

Nth America	55%
European Union	30%
Europe (non-EU)	5%
Middle East/Africa	5%
Asia	5%
Other	—

Outlook

- **Export prices**
Increase up to 5%
- **Export sales**
Increase 10-20%
- **Production capacity**
Increase up to 20%
- **Expansion plan**
Build or move to new or additional factory
- **Main target market**
European Union
- **Hot product trend**
More fashionable designs
- **Major challenge**
Price competition
- **Efficiency improvement**
Upgrade management systems
- **Capability improvement**
Widen product range

Popular export models

Description: Bikini; 80:20 nylon-spandex; 195 to 200gsm; triangle tie-up top; hipster bottom

Women's swimwear

Model	JJS-12-001
Minimum order	2,000 sets
Packaging type	Hanger, polybag
Delivery time	35 to 40 days
Indicated price	\$3.30



Description: Bikini; 80:20 nylon-spandex; 195 to 200gsm; halter tie-up top; all-over printed pattern

Women's swimwear

Model	JJS-12-045
Minimum order	2,000 sets
Packaging type	Hanger, polybag
Delivery time	35 to 40 days
Indicated price	\$3.60



Description: One-piece swimsuit; 80:20 nylon-spandex; 195 to 200gsm; boy shorts bottom; all-over printed pattern

Women's swimwear

Model	FD17092
Minimum order	1,000 pieces
Packaging type	Polybag
Delivery time	35 to 40 days
Indicated price	\$4.30

PRODUCT GALLERY

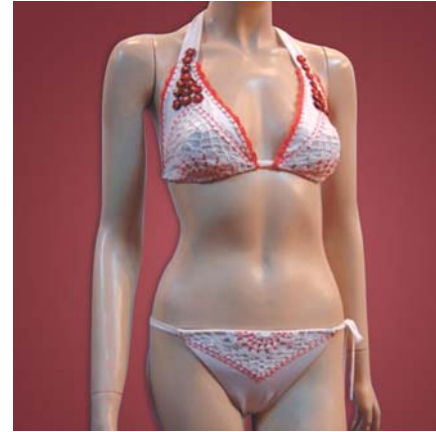
Women's swimwear



Absolut
(profile page 56)
Model: AN-008
Minimum order: 100 pieces
Packaging type: PP bag
Delivery time: 30 days
Indicated price: •
Description: One-piece; 82:18 nylon-spandex; halter top; deep V-neck with lace trimming; sizes 28 to 36



Absolut
(profile page 56)
Model: AN-012
Minimum order: 100 pieces
Packaging type: PP bag
Delivery time: 30 days
Indicated price: •
Description: One-piece; 100% cotton; handcrocheted; wooden beads in front; adjustable straps; sizes 28 to 36



Absolut
(profile page 56)
Model: AN-015
Minimum order: 100 sets
Packaging type: PP bag
Delivery time: 30 days
Indicated price: •
Description: Bikini; 80:20 nylon-spandex; halter tie-up top; tie-up string bikini bottom; lace, crochet trimming; sizes S to XL



Asho
(profile page 56)
Model: GS0901
Minimum order: 500 sets per color
Packaging type: PP bag
Delivery time: 90 days
Indicated price: \$4.72
Description: Bikini; 82:18 nylon-spandex; 200gsm; triangle tie-up top with handcrocheted trimming; thong bottom; allover printed



Asho
(profile page 56)
Model: GS0903
Minimum order: 500 sets per color
Packaging type: PP bag
Delivery time: 90 days
Indicated price: \$3.65
Description: Bikini; 82:18 nylon-spandex; 200gsm; triangle tie-up top with padded cups, gold foil-printed pattern; string detail on bottom



Asho
(profile page 56)
Model: GS0902
Minimum order: 500 sets per color
Packaging type: PP bag
Delivery time: 90 days
Indicated price: \$3.75
Description: Bikini; 82:18 nylon-spandex; 200gsm; triangle tie-up top; tie-up bottom; paillette trimming

• Information not disclosed

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