INTRODUCTION.

Human requirements for apparel fibres cannot be determined in accordance with precise and objective standards comparable to those applied in the field of nutrition. There is no exact measure of fibre needs for human health and well-being. This fact, however, does not lessen the importance of fibres, in a world where the population is steadily increasing.

Clothing and household textiles generally absorb a larger share of consumer expenditure than any other type of consumer goods except food.

Fibres not only provide the world's cloth and apparel, but they also serve a great variety of agricultural and industrial uses.

There is a close relationship between pre-war average real income levels and net fibre consumption per head, those countries in a better economical position consuming nine or ten times as much as poor countries. The differences remain large even when climate and social traditions are taken into consideration.

In 1946 - 47 world production of the five major apparel and household fibres, namely cotton, wool, silk, flax and rayon, was 24% lower than the 1934 - 38 average. Nevertheless, the importance of fibres is becoming more obvious. The range of raw materials has been widened by the development of man-made fibres, and this process is still in a formation stage.

There are vast areas which have not yet been cultivated and which are potential sources for future fibre production. Besides, there is great possibility of expanding the production of natural fibres by methods which need not involve a proportionate extention of land use. The production of raw wool could be increased by the adoption of selective sheep breeding and progeny testing of rams. Seed selection, greater use of manures and fertilizers, improved pest and disease control etc., could bring about an increase in the yield of cotton; this fact also will apply to several other crops grown for fibre. Given these possibilities, the increase in production will be largely determined by world demand.

The general economic development will directly influence the intensity of inter-fibre competition. In an expanding world and especially in the less developed countries, there is room for the simultaneous expansion of production and consumption of natural and man-made fibres. At the same time the vastly increased food needs of the world, particularly in over-populated countries, may cause shifts from natural to man-made fibres. Under such circumstances, the technological improvement and cost reduction in the production of natural fibres, become vital if their position and importance are to be maintained. This accentuates the need for mechanization of all processes involved in the cultivation and market preparation of plant fibres.

The position of man-made fibres is further favoured by their actual price advantage and the high degree of stability in their prices.

The post-war pattern of production differs in many respects from its pre-war counterpart. The relative importance of Mexico, Argentina and Turkey as cotton producers has increased considerably, and production is being expanded in various colonial territories, such as French Equatorial Africa, and the Belgian Congo. In the U.S.A., wool production has declined steadily, whereas in Australia, New Zealand, Argentina and Uruguay, the production has reached a higher level than that of the pre-war period. Output of Manila hemp in the Philippines is rising rapidly, but in 1950 was still only 53 per cent of the production in 1938.

Indonesian production was insignificant compared with 1938.

British East Africa and Mexico have become more important and a number of formerly small producers - Brazil, Haiti, Angola and Cuba, have increased their fibre output considerably.

Flax and silk production is practically unchanged. Jute shows a notable increase in contrast with the decline which took place from 1947 to 1949 after the partition of India.

Rayon production returned closely to the prewar position in 1950, when the output in Italy, Germany and Japan, the main pre-war producers, increased greatly. One permanent change has been the emergence of the U.S.A. as a leading producer of staple fibre. There is also a marked trend towards the development of rayon production in many smaller countries.

Fibre production in the Soviet Union, China and Eastern other countries was somewhat higher in 1950 than in 1938, and accounted for about one quarter of the world output.

The world trade in industrial fibres in 1950 exceeded the level of 1938 for the first time in the post-war period. Exports were 4 per cent higher. Consumption of fibres is steadily increasing, and prices as a rule have gone up.