

**The Fibres, Textile and Textile
Manufacturing Industries in China P.R.,
Forecasts and Environmental
Considerations**

**77th International Wool Textile Organisation Congress
Beijing, People's Republic of China**

Political overview

A. China P.R.

- a. More open economy
- b. Still state controlled
- c. Difference between coastal and inland regions
(labour costs US dollars 0.85 versus 0.55);
Hong Kong 6.21, Taiwan 7.64, Germany 28.17
- d. Movement from rural to urban areas
- e. Membership of the World Trade Organisation

Political overview continued

B. Taiwan

- a. Restructuring
- b. Closer relationship

C. Hong Kong

- a. Slowdown in Pearl River
- b. More technologically intensive

D. Macau

- a. Gambling and tourism

Technical assessment:

China P.R.: age structure of raw material plants
(per cent)

	Built before 1990	Built between 1990 and 2000	Built between 2000 and 2005
Paraxylene	22	46	32
Purified terephthalic acid	10	18	72
Mono ethylene glycol	12	28	60

Environmental assessment

Whether the systems for disposing of solid, liquid and gaseous waste products are effective and meet environmental requirements. For liquid waste, an effective biological waste water treatment facility is required. For gaseous waste, the requirement is a condensation or absorption system for solvent recovery.

Environmental and ecological issues will increasingly influence developments in the manufacture of fibres for disposable products.

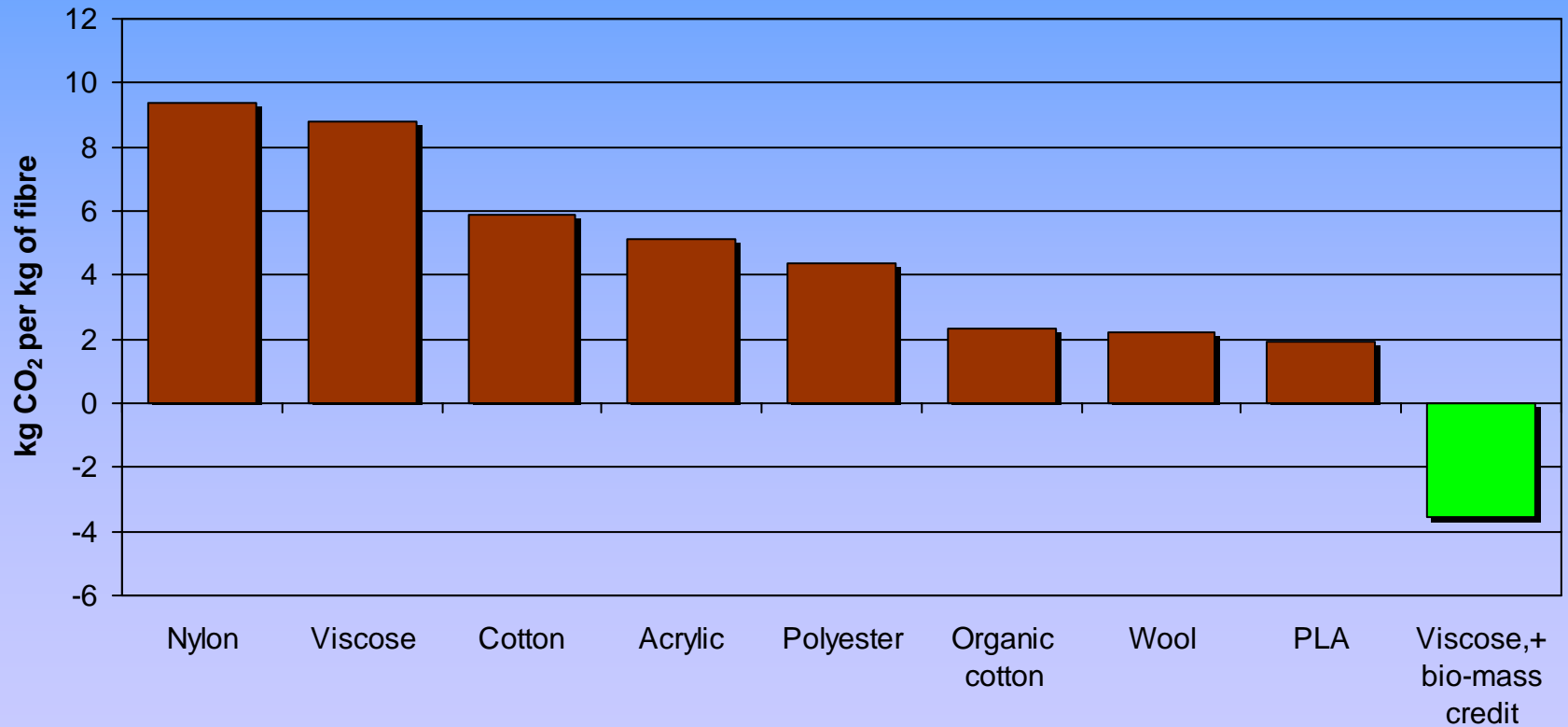
The carbon challenge

Whether as a result of regulatory intervention or mere enlightened self-interest, the pressure of climate change will affect everybody. Textiles and fibre making are no exception.

- Carbon neutrality
- Waste management
- Sustainable resources

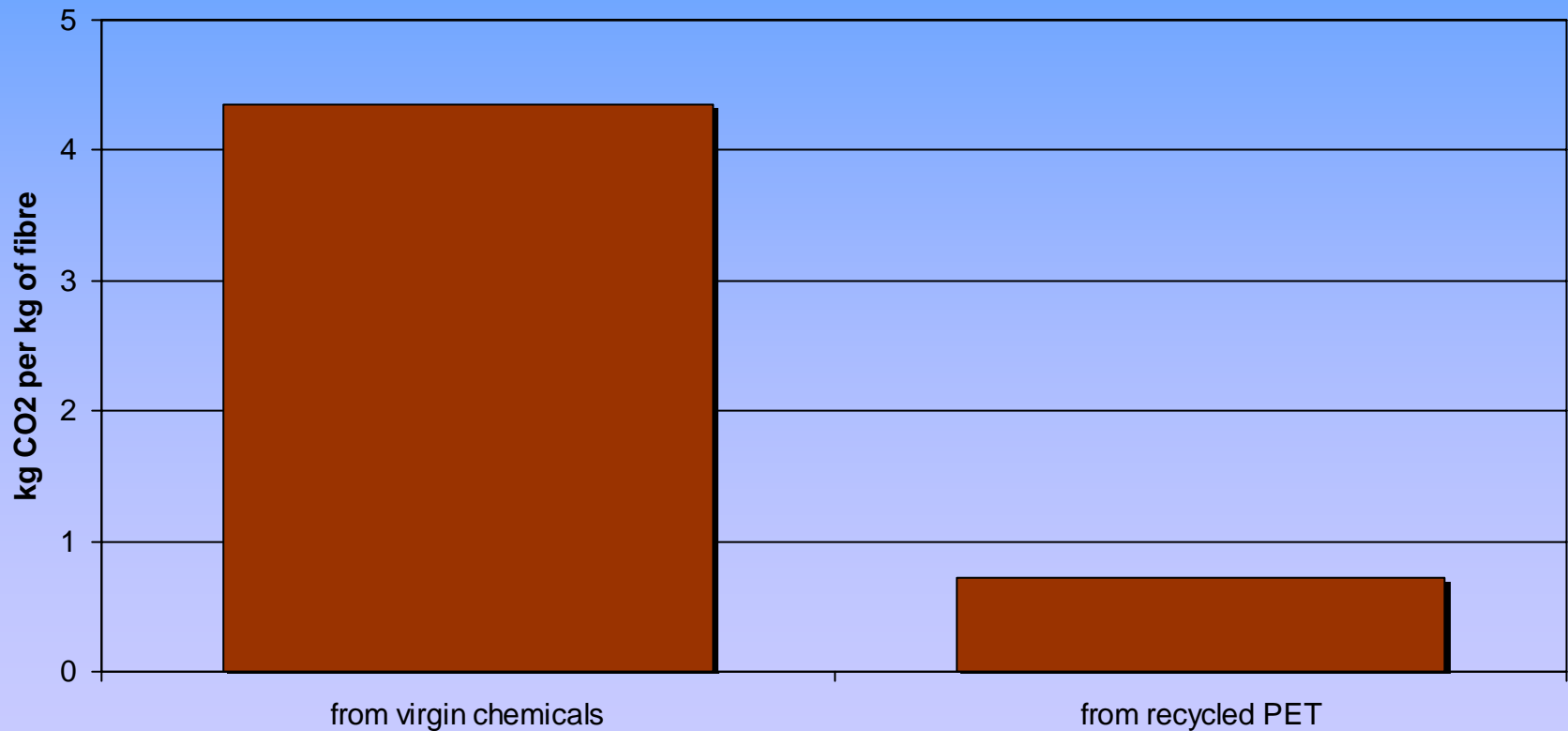
Emissions differ greatly by fibre type

CO₂ emissions associated with selected fibres



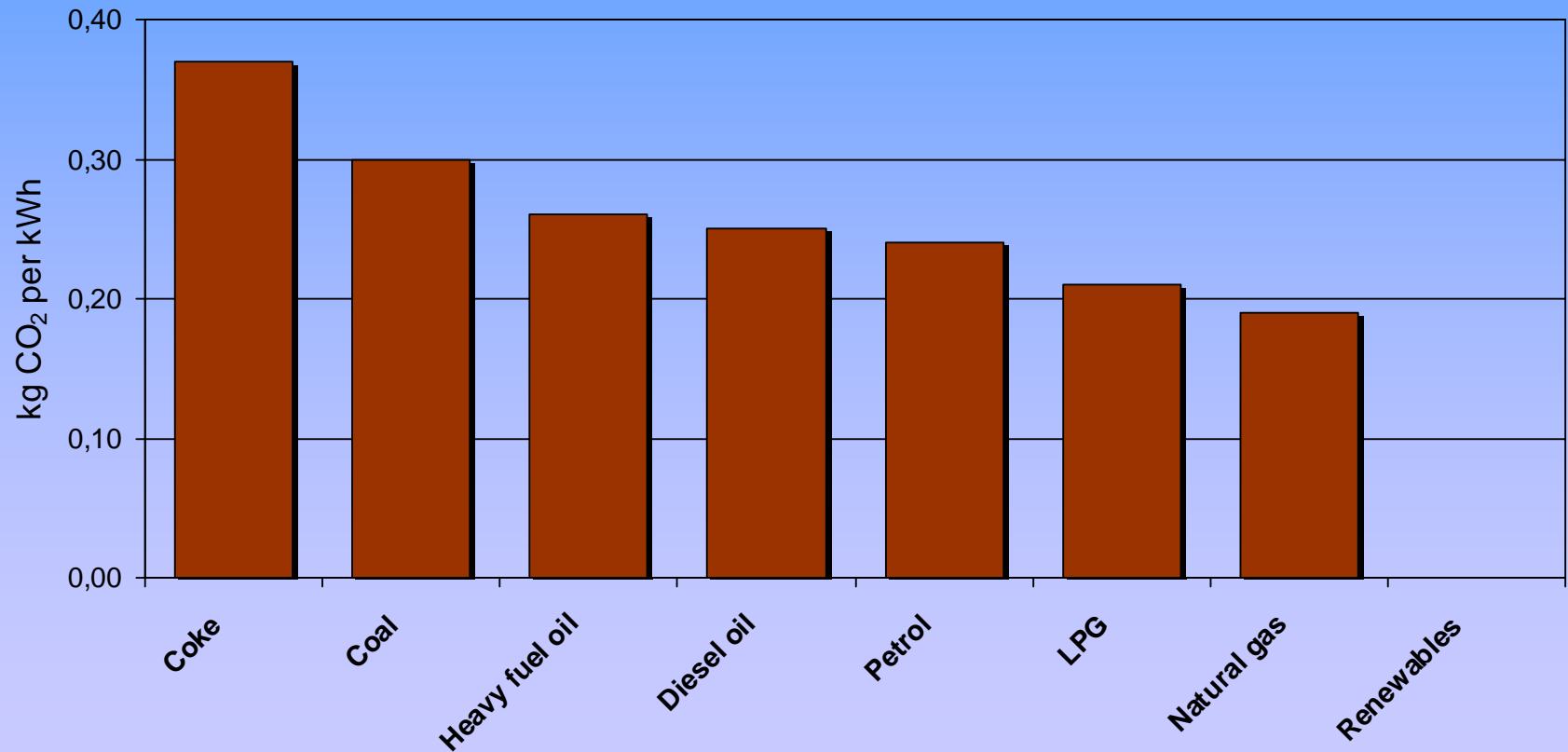
Emissions associated with polyester staple differ with material source

CO₂ emissions associated with polyester staple



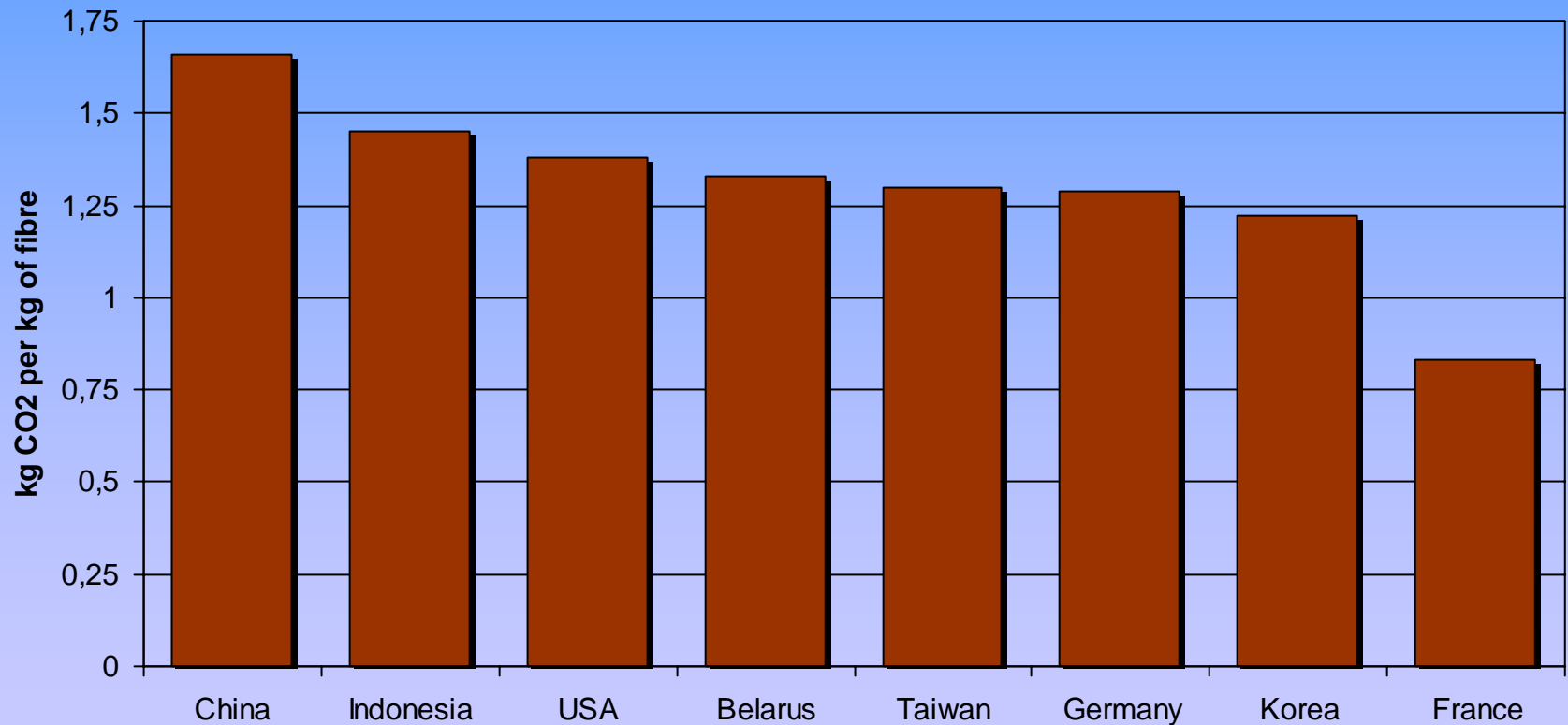
Emissions from electricity generation differ according to the fuel used

Direct emissions from electricity generation



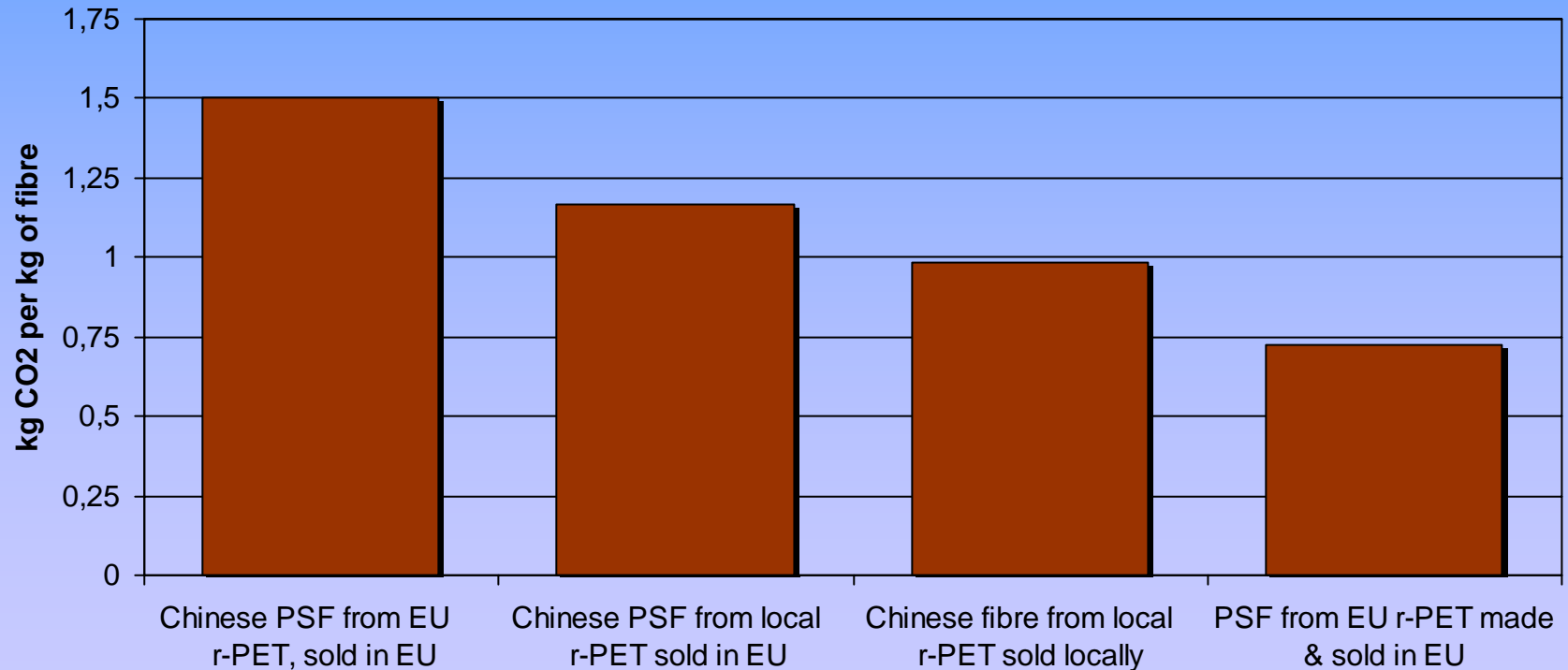
Emissions differ greatly according to manufacturing location & the mix of fuel

CO₂ emissions associated with polymerising polyethylene terephthalate and monoethylene glycol and making polyester staple



Emissions also vary with transportation & distance

CO₂ emissions associated with polyester staple from recycled polyethylene terephthalate



Production, trade and consumption of wool

China P.R. is the world's most important producer of natural fibres. The country is the world's largest producer of cotton and silk, and is the third largest producer of wool (after Australia and New Zealand). China P.R. is also the world's largest consumer of cotton, silk and wool.

China P.R.: production, trade and mill consumption of wool, 1990/91-2009/10

('000 tonnes clean basis)

	1990/91	2000/01	2004/05	2009/10
Production	120.0	147.0	155.0	170.0
Imports	56.2	306.1	318.0	350.0
Exports	5.0	21.0	23.0	20.0
Consumption	171.2	432.1	450.0	500.0

China P.R.: production, trade and consumption of wool and wool-type yarns, 1990-2010 ('000 tonnes)

	1990	2000	2005	2010
Production	237.9	423.2	710.0	730.0
Imports	8.0	43.7	31.0	20.0
Exports	9.2	55.7	65.0	65.0
Consumption	236.7	411.2	676.0	685.0

China P.R.: production, trade and consumption of wool and wool-type fabrics, 1990-2010 ('000 tonnes)

	1990	2000	2005	2010
Production	171.1	143.6	215.0	225.0
Imports	n/a	33.2	35.0	35.0
Exports	n/a	19.4	35.0	35.0
Consumption	171.1	157.4	215.0	225.0

End-use consumption in China P.R.

Kg/head	2003	2004	2005	2008	2010
	7.87	8.93	10.00	12.00	12.50

Conclusions

- a. Government will remain strong
- b. Market socialism
- c. Population 1.4 milliard by 2010
- d. Ageing less consumption of apparel textiles
- e. Increase in interior textiles due to housing
- f. Rural migration. Of working population of 790 million, 490 million in rural areas (62 per cent). In industrialised countries 5 per cent
- g. Automobile sector expanding as will nonwovens

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