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EDITORIAL

WOOL IN THE FIBRE MARKET.

In 1941 Mr. Colin Clark coupled wool with silk as one of the primary products "most nearly threatened by the competition of synthetic products and its economic future during the next twenty years is very uncertain". At the end of World War II similar misgivings were voiced in many quarters. A perusal of the articles written and comments made on wool a decade ago reveals that at that time the opinion was widely held that catastrophic price falls were quite within the bounds of probability, if not extremely likely. In one treatise on the subject the conclusion was reached that there was no future for the wool industry owing to the great progress which had been made in the manufacture of synthetic fibres and which allegedly gave these fibres the properties of wool, but at much lower cost.

The prophets of the immediate post-war period have proved wrong, but there is now some danger that these exaggerated prophecies of doom, coupled with the prosperity of the wool industry in recent years, are giving rise to an equally unjustified complacency regarding the future outlook for the industry.

It is in the United States that the use of synthetic fibres has developed to the greatest extent and consequently the pattern of textile use in that market warrants the closest observation in order to assess likely future trends in other markets, where the use of synthetic fibres is not yet so widespread. This is not to suggest that developments in other countries will follow an identical trend to that of the United States. In fact, there are reasons to believe that there will be marked differences in usage and that in most other markets replacement of natural fibres by synthetics will proceed more slowly. Nevertheless, developments in the United States provide an important guide to the future and, furthermore, the United States is the only country for which satisfactory statistics of fibre consumption over a considerable period of time are available.

Perhaps the most significant development which has occurred in recent years in the United States, and to a limited extent in other countries, is that the wool textile industry, as such, has been losing its separate identity. It is becoming part of a wider textile industry in which the individual mills no longer feel themselves bound by tradition or by any other ties to the use of one particular raw material. The blending of fibres has become widespread and it appears destined to become even more important in the future. The effect of blending in reducing the demand for wool does not appear to be sufficiently recognized. An analysis of mill-use of apparel wool in the United States shows that the average consumption per capita in the period 1952-54 was only half of the average consumption in 1946-48 and was even below the pre-war level, despite the very substantial increase in real incomes which has occurred in the past fifteen years. Increasing competition from man-made fibres is one of the major factors contributing to this decline. Per capita use of synthetic staple fibres increased from 0.34 lb. pre-war to 1.82 lb. in 1946-48, and to 2.76 lb. in 1952-54. This rise in the consumption of synthetic fibres reflects a sharp increase in the use of such fibres for items of apparel for which either wool or cotton has traditionally been considered the most desirable fibre. Cotton has suffered more than wool as a result of competition from synthetics, but the effect on wool has also been considerable. For example, the proportion of

women's sweaters in the United States made mainly from wool declined from 75 per cent in 1948 to 54 per cent in 1953. Declines of somewhat similar magnitude occurred for men's summer-weight suits, separate dress and sports trousers and women's skirts, suits and cardigans. Although the proportion of wool used in many of these items of apparel sold in the United States in the last two years or so has shown some evidence of increase, the increases are small relative to the earlier decline.

The changing trends in fibre use in the United States may be further illustrated by the fact that before the war man-made fibres represented less than 10 per cent of the total fibres used, whereas in the first half of 1955 the proportion had risen to nearly 30 per cent. During this same period the proportion of wool used declined from just over 10 per cent to under 8 per cent and of cotton from about 80 per cent to 63 per cent. Of course, this reduction in wool's share of the textile market is being offset to some extent by the continuous expansion of that market, resulting from increasing population and rising living standards.

Equally as disquieting as the foregoing statistics was the recent statement by the world-renowned textile authority, Prof. J. B. Sparkman, to the effect that the rate at which technical development takes place in the synthetic fibre industries is little short of alarming to those who serve the older textile industries. He continued, "in the few years which have elapsed since the invention of nylon we have, for example, seen the production of crimped staple fibre, crepe yarns, bulked yarns, 'sculptured' effects, and embossed finishes, while in the case of Terylene the dyeing difficulties which seemed at first to present such a formidable obstacle to its use have been overcome in two distinct ways".

The major hope of combating the inroads which synthetics are making on the market for wool lies in the increased application of research to all aspects of the wool industry. Such research should perhaps be specially directed toward helping textile mills to overcome processing problems arising from the use of wool though, of course, the problems of the woolgrowers also deserve careful attention. Under these circumstances, it is unfortunate that Australian research organizations are apparently not able to maintain the wool research programme scheduled for the current and succeeding years due to a serious lack of funds. Certainly a great deal more money and resources have been devoted to wool research in recent years than was the case in the past, but there are many pressing problems which are not yet being investigated.

A field in which comparatively little research has so far been undertaken is in the marketing of wool. The Australian wool marketing system is probably superior to that of any other major wool-producing nation and Australian wools have often commanded premiums over comparable foreign wool because of their better preparation for market. However, this does not imply that further improvements are not possible. One aspect of marketing worthy of more attention is the effect which high-speed and more automatic machinery and other technological changes have on the most desirable methods of preparing wool for the manufacturer. On the whole, too little is known of the preferences of dealers, top makers and manufacturers with regard to the preparation of wool for market.