'99中国国际棉纺织发展战略研讨会论文集

THE COLLECTIONS OF THE THESES FOR THE 99'COTTON & COTTON TEXTILE CONFERENCE-CHINA

'99中国国际棉纺织发展战略研讨会组委会

ORGANZING COMMITTEE OF CCTCC'99

'99中国国际棉纺织发展战略研讨会组委会

The Organizing Committee of the Cotton & Cotton Textile Conference—China, 1999

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'99 中国国际棉纺织发展战略研讨会
论　文　集

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目　录
Contents

’99 中国国际棉纺织发展战略研讨会开幕词

杜钰洲

国家纺织工业局局长

女士们、先生们：
同志们、朋友们：

’99中国国际棉纺织发展战略研讨会今天正式开幕了。中外棉纺织界的专家、学者和企业家欢聚一堂，研讨棉花及棉纺织业面临的挑战和发展机遇，交流棉纺织业的新技术，对于促进中国纺织工业的发展具有重要意义。请允许我代表国家纺织工业局并以我个人的名义对各国朋友和国内同行的到来，表示热烈的欢迎，并预祝’99中国国际棉纺织发展战略研讨会取得园满成功。

1999年是本世纪末的最后一年，也是实现中国纺织国有企业改革与脱困三年目标的关键一年。我国棉纺织行业作为纺织工业的最大和最重要的产业之一，为促进国民经济持续、协调、快速发展担负着繁重的任务。为此，按照实现两个根本性转变的要求，棉纺织行业要加快改革、改组、改造步伐，强化企业管理，调整产品结构，促进科技进步，增强产品市场竞争力，实现产业升级。

当前，我国棉纺织行业正在进行压锭、重组、减员，增效的战略性调整，棉花生产、收购、加工领域的贸、工、农一体化的改革也在进行之中。以顶替进口面料为重点，以效益为中心，加强内部管理，优化产品结构，降低产品成本，促进市场营销，开拓国内外市场，已成为当前纺织行业发展的重要任务。

’99中国国际棉纺织发展战略研讨会是棉花和棉纺织界的一次盛会，也是一次高水平的学术研讨会。我们将一如既往地实行对外开放，竭诚欢迎外国企业界参与中国棉纺织行业的结构调整和技术改造，同各国棉纺织界发展各种形式的经济合作。最后，再次祝贺’99中国国际棉纺织发展战略研讨会取得圆满成功，祝大家事业兴旺，身体健康。

谢谢大家。

一九九八年五月十八日

Opening Address

Mr. Du Yuzhou
President of State Administration of Textile Industry

Dear Ladies and Gentlemen,
Comrades and Friends:

The '99 Cotton & Cotton Textile Conference—China now begins! The international and domestic experts, scholars and enterpreneours in the cotton & cotton textile industries are gathering here to discuss the challenges and development opportunities and to exchange views & information related to the new technology applied to the cotton & cotton textile industries, which is of great significance to promote the development of China's textile industry. On behalf of the State Administration of Textile Industry ,and also in my own name, I am extending a warm welcome to all the international friends and domestic counterparts for your presence at tne conference, and wish a complete success to this Conference.

1999 is the last year of the century, also a most crucial year for the three—year target to get out of difficulties through structural rationalization in the state—owned enterprises for China's textile industry. The cotton textile sector, as one of the biggest and the most important production sectors of the textile industry, bears the task of promotig national economic growth in a sustainable, coordinated and rapid way. In order to realize the two fundamental changes in the industry, the cotton textile sector needs to speed up the reform, restructuring and renovation to strengthen the management and restructure its product, promote the progress of technical renovation, sharpen the edge for market competition, finally to realize the industry's upgrading.

At present, China's cotton textile industry is in the process of being strategically rationalized, as characterized by spindle reduction, consolidation & merging , streamlining ,and profit improving. The reform is also under way in respect of cotton production, purchase and processing in an effort to form a vertical integration. It has become a very important task for the textile industry to emphasize on producing quality fabrics to replace the imported ones, and to focus on the economic benefits through intensifying the management, optimizing product structures, reducing production cost, strengthening marketing promotion in domestic and international markets.

The '99 Cotton & Cotton Textile Conference—China is an important gathering for cotton and cotton textile circles, and it is also a high—level academic symposium. We shall continue, as always, to implement opening policy, and honestly welcome foreign enterprises to join us in the structural rationalization and technical renovation in China's cotton textile industry, and we will develop the economic cooperation in various forms with international cotton textile industry.

In conclusion, I once again give my best wishes to the success of this conference and also my best regards to all of you for your thriving business and good health.

Thank you all.

中国棉纺织业的现状及展望

徐文英

中国棉纺织行业协会理事长

各位嘉宾、女士们、先生们、朋友们：

首先，请允许我代表中国棉纺织界并以我个人的名义向来自世界各地及国内同行们表示诚挚的问候和热烈的欢迎。

今年，是我国纺织工业发展史上承前启后，继往开来的一年，我们在中国纺织名城青岛迎来了首届国际棉纺织发展战略研讨会。今天我借会议召开之际向大家介绍中国纺织工业和棉纺织业的现状和发展前景，希望以此增进我们之间的了解，为促进纺织工业经济、技术和贸易方面的合作起到积极作用，同时，通过国内外同行对棉业和棉纺织业发展的研讨，使大家更清楚地认识和了解国内外棉纺织工业发展现状与趋势，把握机会，交流经验，繁荣经济。

一、中国纺织工业基本情况

纺织工业是中国传统的支柱产业，历来受到我国政府的高度重视和大力支持，改革开放二十年来，纺织工业得到了高速发展，从根本上改变了我国纺织品长期供应不足的局面，纺织工业已拥有相当的规模和较先进的科技水平和管理水平，已成为世界上最大的纺织品生产国。1998 年全国纺织纤维加工总量超过 950 万吨，服装 85 亿件(不含针织服装)，化纤产量 510 万吨，化纤、棉纱、棉布、丝织品、服装和针织品产量均居世界首位。

1997 年我国纺织品服装出口创汇达 455 亿美元，1998 年，受亚洲金融危机影响，出口下降 6%，创汇 428 亿美元。我国纺织品服装出口到世界一百多个国家和地区，已成为举世公认的纺织品出口大国，同时，出口产品质量已有明显提高，服装类出口比重由 1978 年的 20%提高到 1998 年的 70%。

值得一提的是我国化纤行业和服装行业发展迅速，1998 年化纤产量比 1978 年增长 12 倍，在纺织纤维加工总量中的比重由 18%上升到 58%，1998 年服装产量比 1978 年增长 12.5 倍，服装产量和出口量均居世界首位。

本世纪末下世纪初，纺织工业仍将是我国国民经济的重要发展产业，根据国家建立社会主义市场经济的要求，我国纺织工业将进一步加大调整改组、改造力度，压缩低水平生产能力，抓好高新技术产业化，用高新技术改造传统产业，调整行业结构、产品结构和地区布局，搞好技术改造，产品向高档化，经营向集约化方向发展，提高企业经济效益，增强我国纺织品在国内外两个市场中的竞争力。

当前中国纺织工业碰到了前所未有的困难，过去以增量扩张为主的粗放型经济增长方式已不能适应市场经济的需要，低水平的重复建设使产品失去了与国外产品的竞争力，总量过剩使企业效益每况愈下。为此，国务院已确定纺织工业作为国有企业扭亏解困的突破口，计划压缩落后棉纺锭 1000 万锭，压缩毛纺 100 万锭和压缩缫丝 180 万绪。目前这种大规模的结构调整正在实施当中。

我国纺织工业在今后三年的技术进步发展重点是：选择纺织行业中影响大、关联度强的棉纺织、毛纺织、

印染、化纤及纺织机械行业为重点，立足于存量资产的优化重组，以纺织面料为突破口，采用先进技术与装备，提高产品质量、档次，增加花色品种，顶替进口，扩大出口，提高效益，实现产业升级。

二、中国棉纺织行业的现状

棉纺织行业在我国纺织工业中占有重要地位，全国纺织纤维资源75%—80%是通过棉纺设备加工的，1997年，全国乡及乡以上独立核算纺织工业企业中，棉纺织企业（不含印染）7454个，共有职工324万人，工业总产值2059亿元，占纺织工业总产值的26%，纱产量542万吨，布241亿米。1998年棉纱线、棉机织物（不含针织）出口30.7亿美元，占纺织品出口（不含服装）的24%。经过“七五”、“八五”以来的改造，1997年底全国有棉纺锭4245万锭，棉织机75万台，自动络筒机从无到有，目前拥有量4100多台，清梳联合机拥有200多套，无梭织机已超过8万台。

但是，由于重复建设和低水平能力扩张，加上棉花价格及出口退税等因素的影响，棉纺织行业已连续7年出现全行业亏损。1997年底，国家确定了压锭政策，1998年已压缩淘汰了512万锭，1999年的压锭计划还在实施当中，同时，国家调整了棉花政策和出口退税政策，压锭以后的效果已逐步显现出来。

当前棉纺织行业存在的主要问题是：

1、技术进步缓慢，装备水平落后

由于棉纺织行业基数大，改造任务重，近几年虽然改造了一批企业，但总体状况没有得到根本改变，与国外相比有较大差距，例如纺织工业较为发达的国家自动络筒机、无梭织机占有率均在80%以上，我国目前分别为20%和10%左右，最近几年由于企业的经济效益差，技术改造的步伐已明显慢了下来。

2、产品质量不稳定，档次低

我国出口棉纱仍以普梳中号纱为主，精梳纱、特细纱比重不大，1997年共生产精梳纱65.9万吨，仅占棉纱比重的16%，棉纱质量不稳定，疵点多、条干不匀，各类产品仍然以中低档消费市场为主，不能满足中高档产品的要求，售价低，吨纱创汇只有先进国家的1/2。棉布绝大多数是靠有梭织机织造，无梭布比重低，附加值低，缺乏竞争力。

3、劳动生产率低，管理落后

由于我国装备水平落后，管理水平滑坡，棉纺织劳动生产率水平较低，目前我国吨纱用工29.6，日本为10.5，美国4.0，差距较大。

4、棉纺织企业负担过重

中国的棉纺织企业以国有企业为主，多年来的计划体制使企业改造速度慢，加上前面所列的种种原因，企业债务负担重，资产负债率平均80%以上，离退休人员增多，缺乏改造后劲。

三、中国棉纺织行业发展展望

经过压锭调整，棉纺织行业总量过剩的矛盾将得到缓解，今后三年技术进步主要是解决产品质量档次低的问题和降低成本提高劳动生产率，走出困境的出路仍然是坚持三改一加强，抓科技进步、抓技术改造，结合压锭、重组，进行产品结构调整，突出高新技术产业化和用高新技术改造传统产业，实现技术、装备、产品新突破。

1、严格控制总量

棉纺织行业改组改造的原则是控制总量、优化存量、调整结构、提高技术、合理规划、调整布局。在控制总量的前提下，完成压缩淘汰1000万落后纺锭的任务，严格控制低水平棉纺锭延伸。

2、加强企业管理，提高产品质量和档次

当前，加强企业管理，提高产品质量档次已越来越受到企业管理者的重视，企业的竞争就是产品质量的

竞争。我国安庆纺织厂、无锡第二棉纺织厂等一批国有企业依靠实实在在、持之以恒的严格管理使企业产品质量在国内外具有较强的竞争力，取得很好的效益。棉纺织行业要大力提高无结头纱、无梭布的比重，三年内无结头纱比例由18%提高到28%，无梭布比例由18%提高到25%。

3、加强技术改造，不断提高技术装备水平

棉纺压锭以后，棉纺织行业要不断改造，实现产业升级，三年内要使无梭织机达到10万台，无梭织机比例达到15%，积极采用清钢联、精梳机、自动络筒机、无梭织机等新工艺、设备，注重软件开发应用。

4、加速优化结构和重组

经过压锭、重组、兼并、破产，实现结构的优化，形成三个层次的运营格局，一是沿海地区要加大技术投入，集中力量发展精加工、深加工、高附加值、高技术含量产品，形成优势产品、名牌产品、出口产品的生产开发基地；二是重点产棉区要充分发挥资源优势，加大技术改造力度，努力提高产品质量和档次，发展形成生产优质纱、布的生产基地；三是内陆地区和非产棉区要结合市场调研，着重开发适合广大农村消费及具有民族特色的产品，形成以内销为主的纺织品生产基地。

女士们、先生们、朋友们，中国有着12亿人的巨大消费市场，中国棉纺织行业有着光明的发展前景，我们热切希望世界各国棉业界、棉纺织界的朋友到中国来投资、合作和贸易洽谈。二十一世纪是希望与挑战、机遇与成功同在的新时代，我们期待并且相信，中国的棉纺织业将和世界各国的同行共同携手，一起跨入一个崭新的蓬勃发展的时代。

谢谢大家。

Present Situation and Future of Chinese Cotton Textile Industry

Xu Wenying
General Manager, China Cotton Textile Association

Distinguished guests, Ladies and Gentlemen, Friends,

Fist of all, let me extend seasonaly greetings and warm welcome to all friends of the same trade from all over the world on behalf of Chinese cotton textile circle and in my personal name.

This year when it inherits the past and ushers in the future in the history of Chinese textile industry, we are honored to host the first international conference on strategy of cotton textile development in the city of Qingdao famous with its textile industry. I would like to take this opportunity to introduce you to the present situation and future of Chinese textile, especially cotton textile industry, wishing that this would contribute to the mutual understanding between us and thus to trade and economic and tech. cooperation associated with textile industry, and stimulate discussion and information exchange around cotton and cotton textile development on both in and outside China, so as to seize opportunities and boost economies.

1. General situation about Chinese textile industry

Textile industry is traditionally a pillar trade to China and enjoys high priority and supports from government. For the last 20 years since opening and reforms, this industry has developed at high speed, which has totally changed the shortage in textiles supply in this country that had prevailed for long time, and eventually made China become the number one textile production country in the world with significant scale and relatively advanced tech. and managerial levels. For instance, in 1998, the total textile fibers processed in this country surpassed 9.5 million tons; garments (excluding knitwear) of 8.5 billion pieces; man made fibers of 5.10 million tons; ranking first place in the world in production of man made fibers, cotton yarns, cotton fabrics, silkwears, garments and knitwears.

In terms of exports, in 1997, China earned hard currency of 45.5 billion USD and in 1998, 42.8 billion USD in spite of Asian financial crisis. Chinese made textiles/ garments have been exported to more than 100 counties and regions worldwide making China a generally recognized textile exporting power. In the mean time, quality of exported goods has improved substantially; proportion of exported garments increased from 20% in 1978 to 70% in 1998.

It may be worth mentioning that Chinese fiber industry and garment industry have both enjoyed fast development as reflected by the fact that in 1998, man made fiber output grew 13 times compared to that in 1978, or lifted from 18% to 58% in terms of share in total processed fibers; garment production in 1998 grew 13.5 times compared to that in 1978, ranking world first in both garment output and exports.

It is expected that until the end of the century, textile industry will still be one of the trades to be developed in China. According to the state's requirement regarding establishing socialist market economy, Chinese textile industry will develop in the following directions: continued restructuring and reforming, compressing the capacity of lower levels, making progress in high tech. by reforming traditional industry with high and new technology, adjusting product composition and rationalizing geographic distribution, renovating equipment and processes, upgrading products, developing mills towards integration, in order to improve mills' economic performance and sharpen our textiles' competitive edges in markets both home and abroad.

As you may have known, Chinese textile industry is now facing unprecedented difficulties as the result of the growth mode in simple extensive expansion in the past that could not meet the requirement of market economy, and overlapping massive construction, which unavoidably led to losing competition to foreign made goods and overproduction, causing the mills' performance keep worsening with time. To couple with this, the state council has decided to take textile industry as the breach in state—owned enterprise deficit reversing and relief campaign, in which it is scheduled to eliminate 10 million obsolete cotton spindles and 1.8 million silk ends. The battle is currently well under way.

It is decided that key targets in tech. progress to be developed for the next 3 years lie in, face fabrics as the breach aiming at substituting for imports with them and boosting exports in order to realize product upgrading and improve mill performances , by selecting those areas in cotton textile, wool textile, dyeing and printing, man made fibers and textile machinery that are closely interconnected to carry out optimal reorganization in existing assets and reforms with advanced tech. and equipment.

2. Current situation of Chinese cotton textile industry

Cotton textile industry holds important position in Chinese textile industry, with 75%—80% processed textile fibers processed by cotton textile machines. In 1997, of all those textile mills that are financially independent at township level or above, the number of cotton mills (excluding dyeing/ printing) is 7454, employing 3.24 million people, generating a total industrial value of 26% in total textile industrial value, producing yarns of 5.42 million tons and gray of 24.1 billion meters. In 1998, cotton yarn and gray exports (excluding knitwear) valued at 3.07 billion USD, accounting(excluding garments) for 24% based on textile exports. Since 7th and 8th Five Year Plan after renovation reforms, by the end of 1997, cotton spindles installed nationwide amounted to 42.45 million, cotton looms of 750,000, automatic winders, from scratch to currently 4,100 or more, blowing— carding units of more than 200 sets, and shuttleless looms surpassing 80,000 sets.

In recent years, however, the cotton industry as whole has been running in red for 7 years in a row, due to the above mentioned overlapping and low level expansion, combined with influences from cotton pricing and export tax refund policy and etc.. At the end of 1997, the state decided to implement spindle compression and in 1998, 5.12 million spindles were eliminated. The campaign is still being carried out in 1999. The effects of spindle compression combined with that resulting from readjustment of cotton circulation policy and export refund policy then by the state, have gradually appeared.

Main problems currently existing in the cotton textile industry are as follows.

2.1. Slow tech. progress and backward equipment

Due to giant size of the cotton industry and corresponding work load in renovation, the general situation has not been changed substantially in spite of reforms in some mills. Gap compared with abroad is still huge, and taking textile advanced countries as an example, automatic winders and shuttleless looms there each account for more than 80%, whereas that in China merely 20% and 10%, respectively. Moreover, the pace in tech. reform has significantly been slowed down due to bad mill economic conditions in recent years.

2.2. Inconstant quality and lower grades

Ordinary medium count yarns still dominate our exported cotton yarns while combed or super fine count yarns account small portion. In 1997, total combed yarns produced amounted to 659,000 tons representing only 16%, and quality was not consistent, and defects high and evenness bad. Various products therefore have to be targeted primaryly at consumer markets of lower—to—medium classes at lower prices which do not meet the requirements of medium—to— high classes. Hard currency earnings per ton are barely half as much as that from advanced countries. Our cotton gray are mostly woven in shuttle looms and only small portion in shuttleless looms, and accordingly lower in value added rate and lack competitiveness.

2.3. Low productivity and backward management

At present, the labor comsuption per ton yarn in China is 29.6 compared to 10.5 in Japan and 4.0 in U.S., and the gap is huge.

2.4. Heavier burdens on cotton mills

State owned mills constitute the main body of Chinese cotton industry, who, after many years under planned system, made little renovation and in addition, due to reasons mentioned above, these mills bear heavy debt , increasing retired employees and other burdens, and do not possess capability to renovate themselves.

3. Looking into the future of Chinese cotton industry

It is expected that after spindle compression, the contradiction in overall amount surplus will be eased and tech progress be mainly directed to solving the problem of low quality/grade products, and reducing cost and raising labor productivity. Way out also lies in sticking to "three reforms and one strengthening" ——strengthening tech. renovation, combining with spindle compression, restructure and adjustment of product composition, transforming into a high and new tech. industry and reforming traditional one therewith, which will make breakthroughs in new tech., equipment and products.

3.1. Strict controls over total amount

The guide line for cotton industry reforms is to control over the total amount, optimizing the existing assets, adjusting structure, improving tech., correct planning, rationalizing geographic pattern. It is scheduled under premise of controlled total amount that 10 million obsolete spindles be eliminated while severely controlling over low level expansion.

3.2. Strengthening management and upgrading quality and grade

Right now, management and quality/ grades are receiving attentions from mill management more and more and they have come to realize that competition between rivals is that between their qualities. Anqing textile mill and Wuxi No. 2 cotton textile mill and other state owned mills have, for instance, eventually acquired advantages on markets both home and abroad and are enjoying satisfactory economic results by relying down to earth attitude and perseverance in strict management. Cotton textile industry is required to raise knot free yarn rate and shuttleless fabric rate substantially. It is required that in 3 years , the knot free rate should be raised from current 18% to 28%; and the shuttleless rate from 18 % to 25%.

3.3. **Speeding up tech. renovation and upgrading level of equipment**

Upon completion of spindle compression, the cotton textile industry will continue with renovation and upgrading its equipment, and in 3 years, the number of shuttleless looms will reach at 100,000 or their proportion to 15% while actively popularizing blowing/ carding combined units, combers, automatic winders, as well as new technology regarding shuttleless looms and other equipment wherein software development will be put on higher priority.

3.4. **Speeding up structure optimization and restructuring**

Through spindle compression, reorganizing, merge and bankruptcy, a optimal structure will be established forming an operating pattern comprising 3 categories, i.e. 1) coastal area where advantageous industry is developed, name brands produced and export—oriented production/ development bases established by additional tech. input and developing refined and in—depth processing, and value added/ high tech. content products; 2) cotton growth areas where advantage in resources is taken into full play by stressing on tech. renovation and improving quality or upgrading products, and eventually developing into quality yarn and fabric production bases; and 3) non—cotton growth inland areas where production bases for textiles targeting at domestic markets are formed by stressing on developing farmers—targeted consumer goods with ethnic or native characteristics based on market investigations.

Ladies and gentlemen, friends, Since China boasts vast consumer markets with 1.2 billion population and Chinese cotton textile industry has bright future and broad room to develop, we sincerely invite you friends from cotton or cotton textile circles around the world to come to China for investment, or talk on co—op. and trade. 21st century presents both hope and challenge, chance and success. We expect and are confident in that joining together , friends of the same trade and we Chinese cotton textile industry will be striding hand in hand into a new era of vigor, growth and prosperity.

Thank you.

棉花—消费者的选择

丁佩泽先生
美国棉花公司亚洲事务高级总监

谢谢主席先生：

我深感愉快与荣幸被邀请参加本届重要的国际会议。今天，我想探讨一下消费者的重要性以及根据过去30多年来的经历而获得的一些主要情况。而后，我想着重要叙述一下美国棉花公司的一些基本情况及现有的服务，尤其是在中国的服务，并介绍一下我们在上海的工作人员。

世界虽然很大，但由于当今的通迅系统的发展，反而显得越来越小。今天在这里，我们虽然来自不同的地域，但至少有两方面的共同点：即作为消费者，我们都一样要对如何花钱做出选择。我出席此会的部分原因，希望也是您的部分原因，是彼此相互学习。我今天发言目的是强调消费者的重要性以及把我们美棉公司所得到的有关消费者情况与诸位分享。

美国的消费者十分钟爱棉花，年人均消费10.5公斤，而在零售方面，总计达280亿公斤，这一数字自过去16年来一直上升。在美国，棉花在市场的份额一直增加，现占服用及家用面料市场的60%，而在男装的比重却更大，约75%，女装为48%。如果我们回首七十年代，却是另一番情景，你可以看到，棉花在逐渐失去市场的份额。在我解释所发生的变化之前，我首先想说明一下关于市场的一些概念。现在有二种不同的模式说明供需市场是怎样作用于纺织品。首先是一种生产者为导向的市场机制，在这一机制下，生产者选产品，并决定采用哪种纤维用于生产。这种方式通常取决于价格因素。第二种模式为消费者为导向的市场，在这一机制下，消费者通过花钱消费来表明自己的好恶。在此情行下，生产商与零售商对消费者的需求应作出积极回应，才可事业有成。在此，对纤维的选择完全决定于消费者的好恶。在这里是第一例了，表明在生产决定市场这一体制下，消费者只有依赖现有一切，别无选择。

第二个例子强调了消费者的重要性以及如何作用于最终产品直至追朔到上游原料。消费者通过在零售店的购物过程中表达出了他们的选择好恶。这种选择性的好恶始至终贯穿于整个生产过程，直至反应在对纤维的选择。

这种以消费者为导向的市场机制，结果往往表现在零售商之间对消费者需求而作出的迅速反应与竞争，以及其对产品所要求的创新。

质量同样也十分重要，质量不仅是消费者的一种需求，而且是世界市场上对每位成功的供应商的一种要求。

在美棉公司，我们不仅收集消费者已经购买了何种产品这种消费情况，而且想知道用户心中所想。这些信息对做长期工作计划具有价值。美国棉花公司对美国的消费者进行不断的市场调研，努力观察他们的消费态度与购物行为。以下是对全美年度抽样调查中4200位消费者对一些问题的回应。“您是否曾经购买过一件衣服而不多久去决定不想要它?”。70.6%的被调查对对象给予了积极的回答。然后我们问到：“为什么不喜欢它呢?”。最多的回答是款式问题，但出于质量方面的考虑也占了所收回答的12.3%。我们就款式方面获得了更多的反馈：合体与尺寸方面的不满居多，外形也是重要的缺陷。就质量而言，褪色是主要问题。另一问题：“您喜欢购买更时尚的服装还是质量更高的服装?”尽管时尚很重要，但您也会看到质量的重要性。“对于质量好的服装什么特征最为重要?”回答强调经久耐穿性、尺寸合体、款式及舒适性占20%之多。经久耐穿性及舒适性是与消费者密切相关的棉花的属性。令人感兴趣地注意到，你们出口的服装中约有50%～80%的