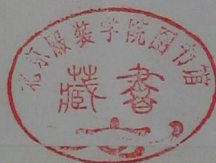


中國研究



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# 中國紡織工業



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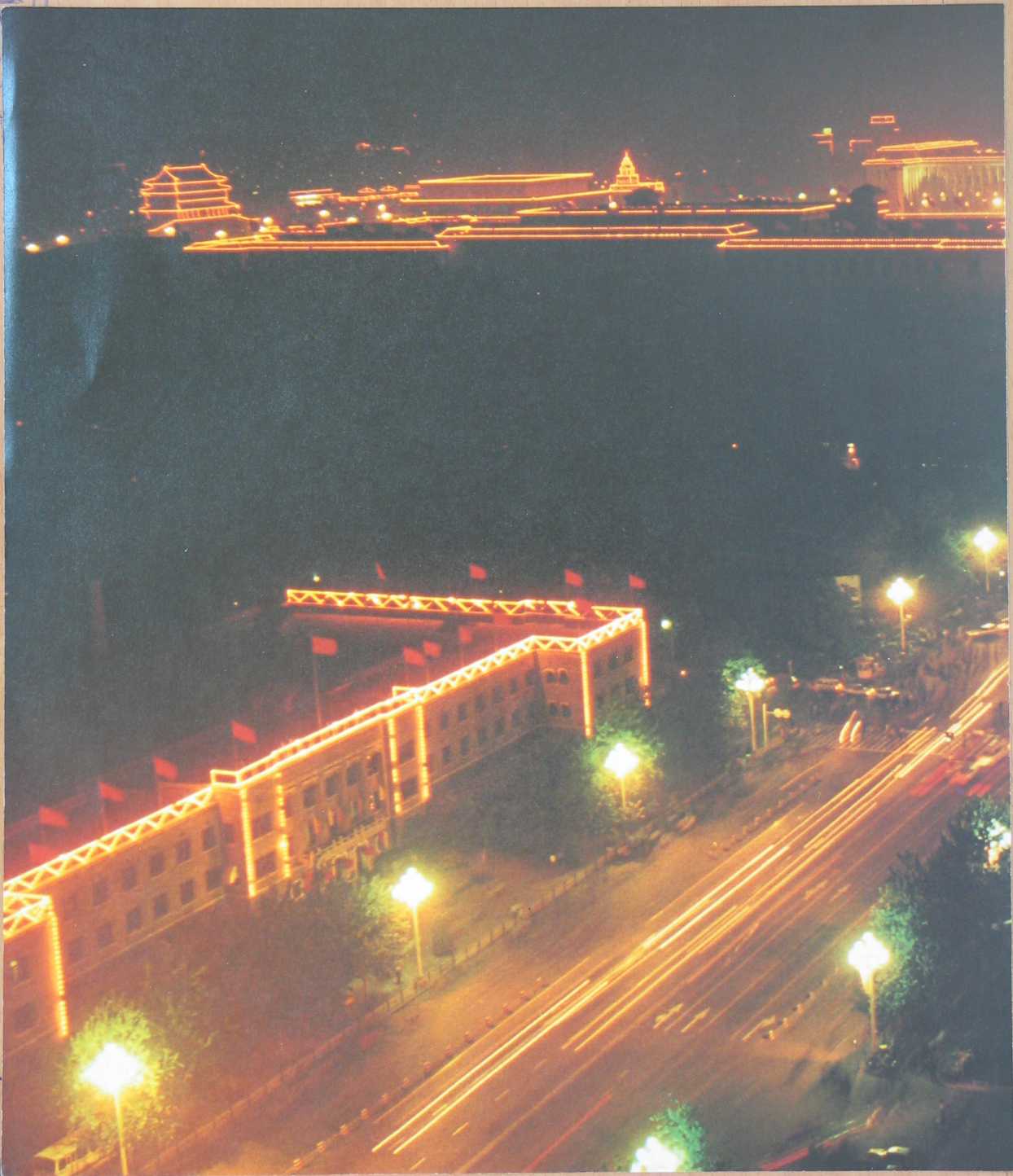
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国家一级企业





# 前 言

紡織工業，中華人民共和國一個龐大的支柱產業。

它是包括棉、毛、麻、絲、化學纖維為原料的紡織、印染、針織、服裝業，以及化學纖維生產、紡織機械、紡織器材等十幾個關連行業的工業體系。

它是一個擁有1200萬職工從業的大工業部門。

它擔負着為世界五分之一人口解決衣被問題的重任，它已使中國人缺衣少被的日子成為過去。

它以雄厚的優勢成為中國參與國際競爭的舉足輕重的產業，它的三分之一產品用於出口，它的創匯值已佔全國外貿創匯總額近四分之一。

它作為新中國經濟起飛的初始積累產業，為社會主義建設作出了重要貢獻：它在全國工業總產值和國家財政收入中都佔到10%左右；衣着類商品在全國社會消費品零售總額中佔到16%。

近代紡織工業在中國，發端於十九世紀八十年代。經過七十年艱難曲折的歷程，到二十世紀四十年代末，形成了500萬錠棉紡設備和13萬錠毛紡設備為主導的工業規模，全國紡織職工75萬。當時在中國，已是最大的一個工業部門。

紡織工業取得長足發展，是新中國建立後的四十幾年間。這不是偶然的。國內億萬人民的衣被消費，積累現代化建設資金，開展對外貿易平衡國際收支，乃至擴大就業、發展地方經濟、農村經濟等種種因素，決定了中國共產黨和政府都高度重視紡織工業。而豐富的紡織原料資源和勞動力資源，巨大的國內城鄉市場，以及國際上產業結構調整的有利時機，給中國紡織工業的發展提供了廣闊天地。

四十年的巨變，不僅使當初對新中國持懷疑的人感到震驚，甚至遠遠超出當初持樂觀態度人士的大膽估計。

同四十年前相比，棉紡織工業已發展到3500多萬錠和84萬多台織機的規模，分別擴大了6倍和12倍。紡錠佔到世界棉紡錠總數的20%。棉紗年產量由180萬件（32.7萬噸）增加到2655萬件（477萬噸左右），棉布年產量由19億米上升到190億米左右。印染工業，年產能力由13億米增加到124億米。

毛紡織工業，已發展到250萬錠以上，約佔全世界毛紡織業總規模的20%，進入世界前列。

苧麻、黃麻、亞麻紡織總規模已達85萬錠，進入了世界前五名之列。

絲綢工業——中國最引為驕傲的傳統產業，五十年代開始逐步復興，現在已再次摘取世界第一的桂冠。八十年代末，生絲產量佔世界總產量的60%，絲織物年產18億平方米。全行業職工由5.7萬人增加到70萬人。這個已有幾千年歷史的古老行業，真正復興了。

針織工業，已遍佈全國各地。

中國素有衣冠王國之稱，但服裝生產形成現代工業的歷史卻不長，直到七十年代全國以工業方式生產的服裝年產量還僅僅3億多件。經過十多年發展，到九十年代初全國服裝企業已發展到1萬6千多個，年產成衣30多億件。



化學纖維工業，雖然是五十年代才在中國起步的新興工業，但發展速度令人矚目。全國化纖生產能力，1970年為15萬噸，1980年為52萬噸；1990年達202萬噸，已進入世界前五位。七十年代，國家把化纖工業列為建設重點，集中財力物力，建成了上海（金山）、遼陽、天津（大港）、四川（長壽）等總共年產化纖原料30幾萬噸的四大化纖生產基地。八十年代，國家又重點建設了年產52萬噸聚酯並具備24萬噸滌綸纖維生產能力的江蘇儀征化纖聯合工業公司，以及河南平頂山錦綸簾子布廠、佛山化纖廠等大型化纖企業。中國最老的化纖企業——丹東化纖工業公司，通過改建、擴建，也變成了年產約6萬噸化纖的大企業。這些大型、特大型現代化化纖企業，實際上是一座座化纖城。而且，都採用了當代世界最先進的設備、技術。

在中華民族世代蕃息的大地上，一系列現代化紡織工業基地出現了。

上海、天津、青島、武漢、重慶、無錫、南通、常州、蘇州等老基地，已是舊貌換新顏。上海，這個世界著名的中國第一大紡織基地，到八十年代末擁有紡織職工55萬，企業500家。它的許多名牌紡織品，大量銷往國際市場。這些老基地，正以自己的技術和管理優勢向深度加工和高品質產品發展，從而贏得國內外盛譽。

全國各地出現了幾十個有一定規模的新型紡織基地。它們是：東北地區的瀋陽、大連、營口、丹東、長春、吉林、哈爾濱；華北地區的北京、石家莊、邯鄲、呼和浩特、太原；華東地區的南京、濟南、濰坊、濰博、煙台、濟寧、寧波、紹興、杭州、嘉興、湖州、合肥、蕪湖、蚌埠、福州、廈門、南昌；華中、華南地區的鄭州、洛陽、安陽、襄樊、宜昌、黃石、沙市、廣州、佛山、新會、深圳、珠海、長沙、南寧、柳州；西北地區的西安、咸陽、蘭州、烏魯木齊、西寧、銀川；西南地區的成都、南充、綿陽、貴陽、昆明；等等。

與紡織工業的巨大生產規模相輔相成，中國擁有豐富的原料資源。八十年代，國家有計劃地安排7000—8000萬畝棉田，400萬畝黃、紅麻田，400萬畝苧麻田。許多地區農村在國家政策鼓勵下種桑養蠶。牧區保持1.1億頭規模的養羊事業。一些主要紡織原料的年產量大體保持在：棉花400~450萬噸，黃紅麻100~130萬噸，苧麻、亞麻30~50萬噸，蠶繭45~50萬噸，羊毛20~25萬噸。中國紡織工業的發展，一個重大的特點，是主要靠自己的人才建設起來。現在已有15所專門培養紡織科技人才的高等院校。從中央到地方有127所科研單位。

中國紡織業的歷史可以上溯到五千年，它的發展溶滲着中華民族的智慧和文化的精華，體現了中華民族的文明和進步。當代中國的社會主義現代化建設，更賦予它重要的使命。在世界東方這塊960萬平方公里的土地上，並沒有因為科學技術的突破性發展，新興產業雨後春筍般的崛起，而使歷史悠久的中國紡織工業減色。相反，它面對二十一世紀的宏偉目標，正是要借助新興科學技術成就，迎接新的繁榮時期。無需更深奧的論證，人類文明的發展將為它提供更多的機遇，中華民族的振興將賦予它更重的使命。

中國紡織工業，充滿希望的事業。



# PREFACE

Textile industry is the major economic pillar of the People's Republic of China.

It covers a comprehensive system of more than a dozen correlative industries, such as spinning, weaving, dyeing, printing, knitting, clothing, with natural and chemical fibres as raw materials, as well as chemical fibre producing, textile machinery and accessories manufacturing.

An enormous industrial sector manned by over 12 million workers and staff.

It undertakes the important task to solve the clothing and bedding problem of one-fifth of the world's population. Gone are days when the Chinese people lived with insufficient bedding and clothing.

A weighty role has been played by it in helping China take part in international competition with one-third of its products for export that makes up nearly one-fourth of the country's total foreign exchange earnings.

An industry to start out with its accumulation to help the New China's economic taking off, it has made great contributions to the country's socialist construction. By its output value in today's China it accounts for 10 percent both of the nation's industrial total and of the state financial income, and by its clothing commodity rate 16 percent of the total national retail sales of social consumer goods.

Modern textile industry in China made a start in the 1880s. It took nearly 70 years (up to the late 1940s) that the country had a textile industry (then being the largest of industries in China) with a total of 5 million spindles for cotton spinning and 0.13 million spindles for wool spinning, manned by a workforce of 0.75 million.

It was in the past forty years after the founding of the People's Republic that great advances were made in developing the country's textile industry. This is by no means accidental as various factors contributed to this such as huge home demand by hundreds of millions of the Chinese people for bedding and clothing and the need for accumulation of fund for modern construction as well as the effort for carrying out foreign trade, balancing international payment, extension of employment and development of the economy by various localities. These call for the Communist Party of China and governments to pay serious attention to the development of textile industry. Abundant resources of raw materials, a rich pool of labour force, vast domestic markets in town and country as were found in China, and the favourable opportunity as was provided upon a readjustment of the international industrial set-up by other countries were also among the factors in greatly promoting the country's development of textile industry.

Great changes in the past forty years not only constituted a great shock to many sceptics about the New China but also far exceeded the boldest estimate of those who had held an optimistic view on China.

Cotton industry in China today, in striking contrast with the days before the founding of the People's Republic, has reached the capacity of 35 million spindles and 0.84 million looms. Over the past there are respectively sixfold and twelfold increases which account for 20 percent of the world's total. The annual output of cotton yarn has increased from 1.8 million bales (0.327 million tons) to 26.55 million bales (around 4.77 million tons), and matched with these is an increased annual output from 1.9 billion meters of cotton cloth to 19 billion meters. The processing capacity of dyeing and printing industry has increased from 1.3 billion meters to 12.4 billion meters of cloth.

Wool industry in China is running at a capacity of 2.5 million spindles or 20 percent of the world's total, placing China among the world advanced.

Ramie, jute and flax industry in China has altogether a total of 0.85 million spindles, listing the country among the five top processors of the world.

Silk industry, a traditional line of China and the national pride, had undergone a period of restoration during the 50s. Now it has regained China's former laurels in the world. Silk production saw its heyday as an old traditional line of China with a history of several thousand years of development. By the late 80s an annual output of raw silk was registered accounting for 60 percent of the world total and an annual amount of 1.8 billion square meters of silk fabric was produced with a workforce of 0.7 million as against 0.057 million.

Blossoming everywhere in China is also a developed knitting industry.



China has been universally honoured as the kingdom of clothing, yet its history to have clothing production as a modern industry is not long; up to the 70s it claimed an annual amount of merely 300 million pieces. In the last ten years or so, it has increased to an annual amount of over 3 billion pieces by more than 16 thousand clothing manufactories by the early 90s.

Chemical fibre production in China, undertaken as a new industry as late as in the 50s, has experienced laudable development. The annual capacity of chemical fibre was 0.15 million tons by 1970, 0.52 million tons by 1980 and 2.02 million tons by 1990, placing China among the largest five chemical fibre producers of the world. To develop chemical fibre industry as a key industry of the country in the 70s, four big chemical fibre bases were built in Shanghai (Jinshan), Liaoyang, Tianjin (Dagang) and Sichuan (Changshou) by a concentration of financial and material resources to achieve an annual capacity of more than 0.3 million tons of raw materials for chemical fibre production. Following this were some other key chemical fibre bases built like Yizheng Joint Corporation of Chemical Fibre Industry in Jiangsu province with an annual output of 0.52 million tons of polyester and an annual producing capacity of 0.24 million tons of polyester fibre, and such large chemical enterprises as Pingdingshan Polyamide Tyre Cord Fabric Plant in Henan province and Foshan Chemical Fibre Complex in Guangdong province. Through expansion and reconstruction, Dandong Chemical Fibre Industrial Company, the oldest chemical fibre enterprise of China, was also turned into a large one with an annual capacity of 0.06 million tons of chemical fibre. These large and extra large modern chemical fibre enterprises by themselves comprise of virtually individual chemical fibre cities all operating with the most advanced equipment and technology of the present-day world.

Along with these are also many other modern textile industrial bases having been built over the land of China.

Replaced with a new scene are now a good many old textile bases such as Shanghai, Tianjin, Qingdao, Wuhan, Chongqing, Wuxi, Nantong, Changzhou and Suzhou. In Shanghai, known to the world as the largest textile base of China, there were 500 textile enterprises with more than 0.55 million workers and staff by the end of the 80s. They produce many famous brands of products, that all enjoy brisk sales on the world market and have won wide acclaim both at home and abroad for their high quality.

In addition, several dozen new-type textile bases have been built on a fairly big scale in other places of China. These include Shenyang, Dalian, Yingkou, Dandong, Changchun, Jilin and Harbin in Northeast China; Beijing, Shijiazhuang, Handan, Huhhot and Taiyuan in North China; Nanjing, Jinan, Weifang, Zibo, Yantai, Jining, Ningbo, Shaoxing, Hangzhou, Jiaxing, Huzhou, Hefei, Wuhu, Bengbu, Fuzhou, Xiamen and Nanchang in East China; Zhengzhou, Luoyang, Anyang, Xiangfan, Yichang, Huangshi, Shashi, Guangzhou, Foshan, Xinhui, Shenzhen, Zhuhai, Changsha, Nanning and Liuzhou in Central and South China; Xi'an, Xianyang, Lanzhou, Urumqi, Xining and Yinchuan in Northwest China; and Chengdu, Nanchong, Mianyang, Guiyang and Kunming in Southwest China.

Matched with China's textile production on tremendous scale are its abundant raw material resources. To guarantee textile production according to the plan in the 80s, 70 to 80 million mu of land were grown to cotton, 4 million mu to jute and hemp, and 4 million mu to ramie. Sericulture was widely encouraged by the state in the rural areas. In the pastoral areas 110 million head of sheep were raised. The annual output of major textile raw materials stood at: cotton 4-4.5 million tons, jute and hemp 1-1.3 million tons, ramie and flax 0.3-0.5 million tons, cocoon 0.45-0.5 million tons and wool 0.2-0.25 million tons. As is special to China, textile industry has been developed mainly self-reliantly. There are now in China 15 colleges and institutes of higher learning specializing in the training of textile scientific and technical textile personnel and 127 scientific research institutions at the central and the local levels.

The textile industry in China can be traced back to more than 5,000 years ago, it crystallizes the wisdom and culture of the Chinese nation. It is nowadays urgent to undertake a greater mission to push forward construction of socialist modernizations. Notwithstanding a great number of new and developing industries spring up as a result of the break-throughs made in science and technology, China's textile industry though long aged, never impairs its significance. Facing the grand targets in the 21st century, on the contrary, China's textile industry just requires those achievements to push forward such works as resource exploitation, technology renovation, new product development etc.

China's textile industry will attain growth. It is a cause with brilliant prospects.



# 美的奉獻

紡織工業，創造美的事業。

人類第一個歷史活動，就是生產滿足衣、食、住所需要的資料。而服飾的產生過程，正是人類從蒙昧走向文明的過程。豐衣足食，曾經是中國人民在漫長歷史歲月中為之奮鬥的一個社會理想；而在今天，人民羣衆的服飾美，已成為建設現代文明社會的一個重要標誌。

五十年代以後，至少有三十年間，中國紡織工業的最大課題，是如何在數量上滿足城鄉億萬人民的衣被需要。中國領導人在五、六十年代之際提出“要為人民衣被甚少着想”的指示，就是這一經濟思想和當時紡織品供應短缺的反映。由於按人口平均的紡織品生產量很有限，國家不得不在全國實行發布票限量供應的政策。與此同時，政府大力發展棉花生產，扶植紡織業。經過二十幾年的努力，在1977年，全國棉布產量突破100億米大關；雖然全國人口比1954年增加3億即50%左右，紡織品供應情況却明顯好轉。又過五年，1982年全國棉布產量達到153.5億米，甚至出現了紡織品供應的“買方市場”種種迹象。終於在1983年12月，取消布票制度，敞開供應一切紡織品。人們完全放心了——中國紡織工業已確定無疑地，在數量上滿足了城鄉人民對紡織品的需要。

從1950年到1990年，中國人口從5.5億增加到11.6億多，同期按人口平均的纖維製品分得量，由不到2公斤上升為5.6公斤。中國紡織職工，尤其是為此奮鬥了幾十年的中國紡織界人士，對此不無自豪。

八十年代的十年間，改革開放的浪潮波及到中國人的服飾。隨着人們物質文化生活水平提高以及生活方式、價值觀念的變化，在服飾上移風易俗、追逐潮流的波瀾逐步由都市擴展到鄉村，從青年擴展到中老年，中華民族正以自己特殊的時代感受和審美表現匯入世界現代服飾的潮流。

不少地區的農村，並不讓城市專美於前。一些商品經濟發達的鄉鎮居民服飾，已與大城市沒有什麼差別。

一貫以服飾著稱的中國衆多少數民族，由於現代提花機、綉花機和印花機的大量使用，蠟染、扎染傳統手工藝的機械化，以及大量物美價廉的化纖仿真織品的問世，使生活在內蒙、新疆、西藏、青海、雲南、貴州、川西北、湘西、吉林、遼寧等地各少數民族普通羣衆的服飾更華美、更豐富、更富民族文化的表現力。現代氣息就象一種普照的七色光，使中華五十六個民族的服飾，更加燦爛奪目。

一個統計數字，也許能概括說明這一切變化：1990年全國穿着類商品零售總額比1952年增長20倍。

八十年代以來，中國城鄉出現了一種新的商業現象——城市的“服裝街”和農村的“服裝大集（市場）”。數以百計、甚至上千的個體經營的服裝攤位，集中連片，蔚為大觀。

在一些大中城市，名時裝店、名時裝設計師、名時裝模特兒應運而生。1988年中國時裝模特隊第一次出現在巴黎國際時裝節，以其東方魅力引起了轟動。

中國社會崇尚節儉的傳統沒有變，中國政府也不提倡脫離生產水平的高消費。但是，當你從首都到邊城，從沿海到內地，到處可見紡織品服裝市場上人如潮涌；當你看到普普通通的中國百姓追逐時代審美潮流的應時裝束，一定會由衷地感到，中國人的生活提高了，中國的社會時尚變化了。而這正是以“辛苦我一個，美化億萬人”為己任的紡織職工的價值所在。



# DEDICATION OF BEAUTY

Textile industry is a creative undertaking to create beauty.

The first activity of human being in history is to produce food and clothing. The production of clothing simply signifies men's prolonged advance from barbarism to civilization. To live with ample food and clothing had been the long-cherished dream of the Chinese people down the ages. Seeking beauty of clothing by now has become an important symbol marking the construction of a modern civilized society in China.

Since the 50s, especially within the 30 years after the founding of the People's Republic, the greatest task of China's textile industry was how to satisfy the great demand of the Chinese people in town and country for bedding and clothing. The instruction, "Be concerned about people's clothing and bedding", as was given by Chinese leaders around the 50s and 60s was just a reflection of such an economic thought and shortage of textile supply at that time. In view of the small per capita amount of textile productivity then in China, coupons were issued in limiting the demand of cloth supply. In the meantime, efforts were made by the Chinese government for textile production and for greater supply of raw materials. Through over twenty years of effort, in 1977 a total of 10 billion meters of cotton cloth was topped. Although the country's population increased by 300 million, or 50 percent of the nation compared with 1954, the situation of textile supply took a noticeable turn for the better. After another five years, in 1982 a total of 15.35 billion meters of cotton cloth was produced. This gave rise to a "buyers' market" in China's textile production. Finally in December 1983, cloth coupons were totally abolished when all textile products were open to sale. The situation assured people of the country that China's textile industry has undoubtedly satisfied the need of the people for textile both in town and in country.

From 1950 to 1990, China's population increased from 550 million to over 1.16 billion. In the meantime, the per capita amount of fibre products rose from less than 2kg to 5.6kg. These undoubtedly speak of the great achievements made by the Chinese textile workers and staff especially those who have struggled for dozens of years towards that end in China.

In the ten years of the 80s, the tide of reform and opening to the outside world swept over the land of China, resulting in changes in people's clothing. With improved material and cultural life and changed life style, people, old and young, as well as the middle-aged, come to live with a different sense of value, joining in the tidal waves of reform for changing old habits and customs as specific to their feeling and sense of beauty.

Furthermore, a similar spectacle is presented in China's rural areas competing with cities. In many rural areas with a developed commodity economy there is found almost no difference in people's clothing from those in cities.

In virtue of the fact that modern jacquard, embroidery machine and printing machine came to wide application, together with the mechanical integration of the traditional handicraft art like wax printing and knot-dyeing, as well as the introduction of large volume of chemical fibre fabric imitating natural fibre with high quality but low price, the dresses and costumes of China's 56 minority nationalities in Inner Mongolia, Xinjiang, Tibet, Qinghai, Yunnan, Guizhou, Northwest Sichuan, West Hunan, Jilin and Liaoning have become more elegant, varied and colorful, like a multitude of resplendent lights shining brightly.

Illustrative is the figure given to show the developments made by China in solving the nation's clothing problem: in 1990 the total clothing retail sales increased by 20 fold over 1952.

Since the 80s, a new commercial phenomenon has appeared in China: there are various "Costume Streets" and "Country Clothing Fairs" that have been built and developed. Hundreds and thousands of privately-run clothing stores stand in a grand sight of serried contiguous mass.

Dress stores, fashion designers and fashion models began to have their part to play in China's large and medium-sized cities. Chinese fashion models made their debut in the Paris International Fashion Festival in 1988 to create a stir with their oriental glamour.

To practise frugality as following the tradition of the Chinese people has not yet been changed and no high consumption detached from the present-day production level has been encouraged by the Chinese government. But this does not exclude the grand surging tide of customers on the Chinese textile and clothing market and the colorful sight of their clothing when you go on a visit from the capital to the border cities, and from the coast areas to the hinterland. You will certainly feel from the bottom of your heart that the Chinese people's life is daily improving. Naturally, this shows the full significance of the labour of the Chinese textile workers and staff.



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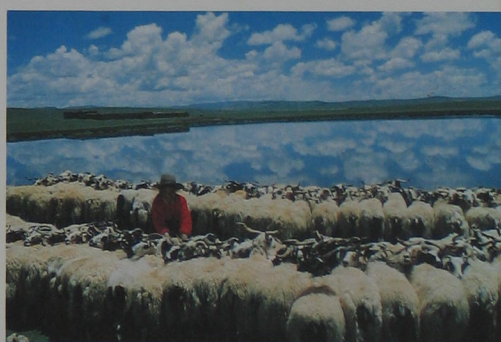
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