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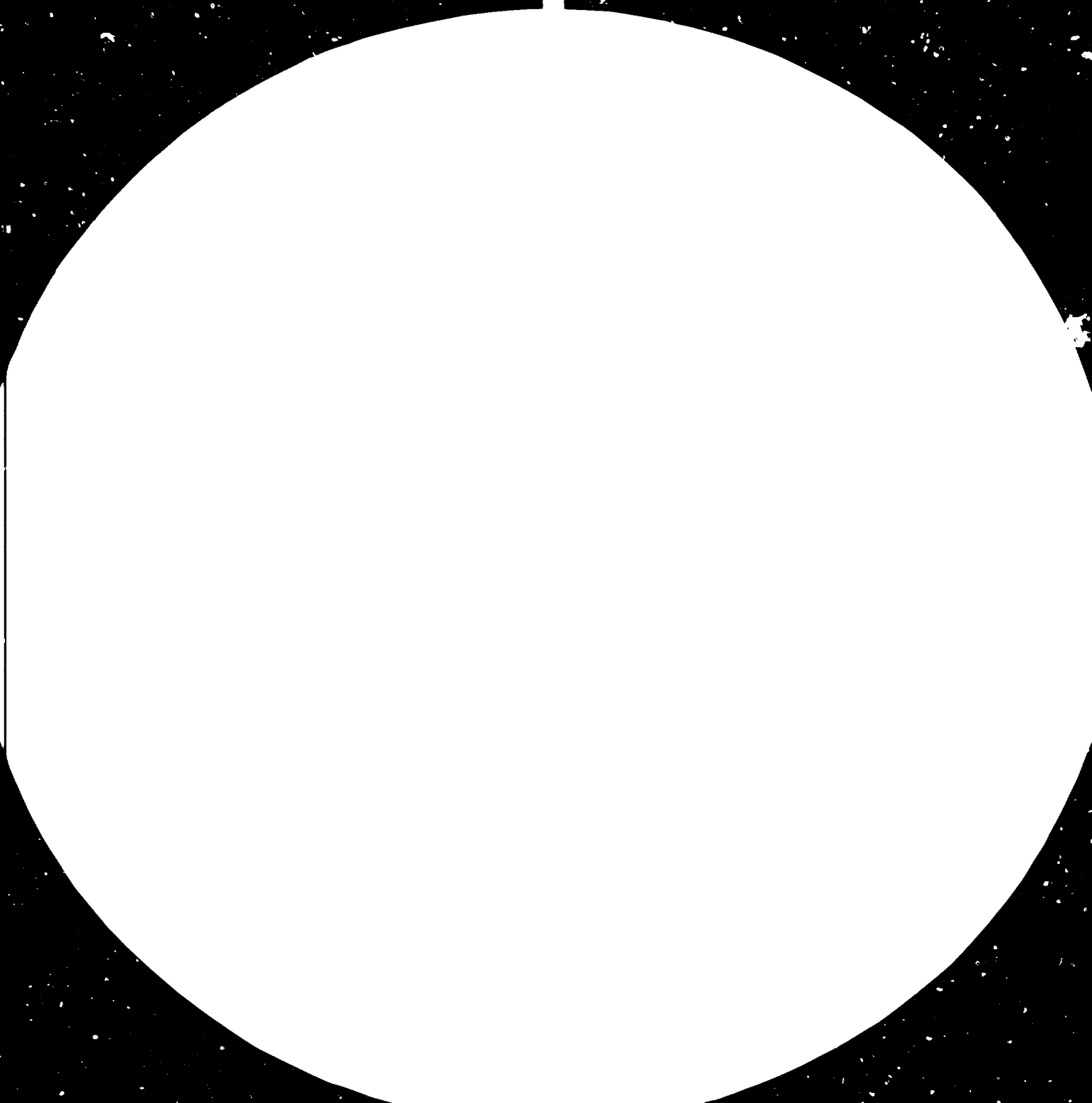
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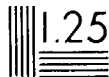
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THE SITUATION OF THE SYNTHETIC FIBRE INDUSTRY IN BANGLADESH*

by

Meer Tabarrak Husain**

* The views expressed in this paper are those of the author and do not necessarily reflect the views of the secretariat of UNIDO. This document has been reproduced without formal editing.

** Senior Manager, Zeenat Textile Mills Ltd., Tongi, Dacca, Bangladesh

Between 20.34° & 26.38° North Latitude and between 88.01° and 92.41° East Longitude People's Republic of Bangladesh was born on 26th March 1971. After 264 days war it got liberated from Pakistan's occupation.

Area : 143,998 square kilometres.

Capital : DACCA
Area of DACCA: 320 square Killometres.
Population of Dacca: 3 million(approx)

Main Seasons : Winter(Nov. - Feb.)
Summer(March-June)
Monsoon(July-October)

Climate : Temperature Maximum 34°c
Minimum 11°c
Rainfall Maximum 345 cm
Minimum 120 cm
Humidity Maximum 99%
Minimum 36%

Principal crops : Rice, Jute, Tea, Tobacco, Sugar Cane, Pulses, Oilseeds, Potatoes, Vegetables, Bananas, Mangoes, Pineapples, Coconuts etc.

Principal Industries : Jute, Textile, Chemicals, Steel & Engineering, Tea etc.

Principal Minerals : Natural Gas, Lignite & Limestones.

Principal Exports : Jute & Jute goods, Tea, Hides & Skins, Newsprint, Fishes, Rayon & Readymade Garments.

Foreign Trade : Export(f.o.b) : 12509 million Taka
Import(c.i.f) : 40144 million Taka

Population : In 1971 : 71 million
1981 : 90 million

POPULATION ESTIMATES & GROWTH RATE

Year (January)	Population(million)			Average annual growth rate in %	Crude birth rate	Crude death rate
	Male	Female	Total			
1971	36.7	34.3	71.0	2.4	43.0	18.0
1975	40.3	37.7	78.0	2.6	39.7	16.5
1980	45.2	42.4	87.6	2.3	35.9	14.2
1985	50.3	47.4	97.7	2.2	32.7	13.7
1990	55.3	52.2	107.5	1.9	30.5	13.0
1995	60.3	57.1	117.4	1.8	28.6	12.6
2000	65.1	61.8	126.9	1.6	26.6	11.6

TEXTILES

Textile Industry occupies a pre-eminent position in the economy of Bangladesh. Although in broader sense Jute comes under the purview of Textiles, but in Bangladesh Jute is being treated as a separate sector of Industry. Textile Industry provides clothing which as a basic need stands next to food in order of importance. It makes substantial contribution to the economy in terms of value added and employment. It accounts for about one fourth of the contribution of the manufacturing sector to the Gross Domestic products and provides direct employment to over one million people. The handloom industry alone employs about 0.85 million while the large textile mills employ 75,000 people. Over 60,000 people are engaged in Hosiery and specialised textiles. The industry has a wide scope for expansion in Bangladesh which has surplus and relatively cheap labour and large domestic market. It has also high potential for earning foreign exchange through export of garments and specialised textiles.

PRESENT CONSUMPTION AND PRODUCTION OF YARN

Name of Yarn	Present consumption in million kgs.	Present country prod- uction in million kgs	Import from abroad in million kgs.
Cotton	53.88	46.24	7.64
Wool 50% + Acrylic 50%	0.09	0.09	-
Polyester	0.18	-	0.18
Polyamide	2.72	0.70	2.02
Polyacrylic	0.13	-	0.13
Rayon	1.20	2.20	-
TOTAL:	58.20	49.23	9.97

PRESENT CONSUMPTION AND PRODUCTION OF FABRICS

Name of Fabrics	Present consumption in million metres	Country production in million metres	Import from abroad in million metres
Cotton fabrics	518.10	477.59	40.51
Synthetic fabrics	70.96	48.10	22.86
Silk & Art Silk Fabrics	31.46	31.46	-
Secondhand clothing	249.72	-	249.72
TOTAL:	870.24	557.15	313.09

PRODUCTION FACILITIES AVAILABLE IN THE COUNTRY

PUBLIC SECTOR

Sl. No.	Type	No. of unit	Installed Machines	Working Machines	Production capacity	Present actual production '80-81
1.	Cotton Spinning	58	11,11,000 Spindles	10,17,400 Spindles	77.62 mil. kgs.	46.24 mil.kgs.
2.	Wool+Acrylic(50% + 50%) Spinning	1	2,200 Spindles	1,400 Spindles	0.14 "	0.02 " "
3.	Nylon 6 filament yarn	1	1,260 Spindles	900 Spindles	0.85 "	0.70 " "
4.	Reg.Rayon filament yarn	1	1,173 Spindles	1,173 Spindles	3.00 "	2.20 " "
5.	Cotton weaving	26	7,592 looms	6,652 looms	127.65 mil. metres	78.61 " metres
6.	Wool + Acrylic (50% + 50%)weaving	1	45 looms	35 looms	0.20 "	0.18 " "
7.	Nylon 6 weaving	2	160 looms	153 looms	2.49 "	1.55 " "
8.	Nylon 6 warp knitting	1	14 Machines	8 Machines	0.68 "	0.68 " "
9.	Textile finishing	17			60.35 "	45.26 " "
PUBLIC SECTOR TOTAL:		108			81.61 " kgs. 191.37 mil. metres	49.16 " kgs. 126.29 mil.metres

PRIVATE SECTOR

Sl. No.	Type	No. of unit	Installed machines	Production capacity (2 Shift basis)
1.	Hand Loom	1968	2,50,000 looms	365.75 million metres
2.	Synthetic looms	57	792 "	6.51 " "
3.	Silk looms	3	56 "	0.28 " "
4.	Synthetic warp knitting	24	109 machines	17.94 " "
5.	Ordinary Power loom(cotton)	44	396 looms	5.43 " "
6.	Specialised Textile for Bed sheet, Bed cover, Towel, Canvas, etc.	42	796 "	19.59 " "
7.	Textile finishing compl-ete(Dyeing, Printing & other finishing).	120	7 complete units	37.03 " "
			32 Mech. Zigger	2.19 " "
			118 "	6.03 " "
			207 Printing tables	14.72 " "
			4 complete calender-ing plant	21.03 " "
			2 complete raising unit	0.18 " "
			6 complete plant for Mercerising of yarn	0.64 " kgs.
8.	a) Hosiery(Body)	251	1,903 machines	5.17 " "
	b) Socks	123	562 "	8.41 " pairs
	c) Sweater		107 "	0.06 " "
	d) Muffler	70	74 "	1.06 " "
9.	a) Readymade garments for export	24	-	1.18 " pcs.
	b) Readymade garments for home	64	-	5.66 " "
10.	Specialised textiles for export	2	-	.79 " "
	Specialised textiles for home	8	-	.61 " "
11.	Tape, lace & Braid	45	5,330 Heads	1.45 " kgs.
12.	Sewing Thread	55	1,211 Machines	5.27 " "
13.	Twine	35	14,580 Spindles	0.62 " "
PRIVATE SECTOR TOTAL:		2,945		498.08 million metres 9.53 " pairs 6.84 " pcs. 13.15 " kgs.

DEVELOPMENT IN THE NEAR FUTURE

By 1985 the population of Bangladesh is expected to be 100 millions for whom targetted requirement of cloth is 1097.28 million metres at the rate of 10.97 metres per head. By that time the requirement of yarn is estimated at 136.05 million kgs. of which 7.25 million kgs. will be imported from abroad & 128.80 million kgs. will be locally produced. Apart from catering to the home requirement, Bangladesh desires to be in the export market with certain textile items. To this end the Government has worked out the following Investment schedule for the period from 1980 to 1985.

PUBLIC SECTOR

Investment in million Taka

Sl. No.	Category	Physical Target	Investment		Total Investment
			Local Tk.	Foreign Exchange	
1.	Balancing, Modernisation & Replacement of old machines of existing mills	9,46,000 Spindles 7,488 looms in 50 mills	682.40	-	682.40
2.	On going Projects	1,12,500 Spindles	199.70	225.00	424.70
3.	New Spinning mills	4,25,000 "	1,047.00	1,260.00	2,307.00
4.	Cotton, Ginning, Bailing & storage		132.00	108.00	240.00
5.	Polyester cotton plant & finishing plant.	1 plant 1 plant	81.60	96.50	178.10
6.	Studies, Research & Laboratories		39.30	7.90	47.20
7.	Handlooms Promotional facilities and services		195.30	54.80	250.10
8.	Sericulture Projects		105.80	15.40	119.20
TOTAL:			2,481.10	1,767.60	4,248.70

PRIVATE SECTOR

Investment in million Taka

Sl. No.	Category	Physical Target	Investment		Total Investment
			Local Tk.	Foreign Exchange	
1.a)	Textile finishing (Mechanised & semi mechanised)	14 Units 86 "	272.40	282.00	554.40
b)	Balancing, Modernisa- tion & Replacement of existing Textile finishing		20.00	40.00	60.00
2.a)	Synthetic Textiles	1200 looms	240.00	240.00	480.00
b)	BMR of existing synthetic textiles		10.00	10.00	20.00
3.a)	Specialised Textile (cotton group)	400 looms	80.00	80.00	160.00
b)	BMR of existing ones		5.00	10.00	15.00
4.a)	Horizontal power loom	3400 looms 10 sizing units	150.00	233.80	383.80
b)	BMR of existing loom		5.00	10.00	15.00
5.a)	Spooling & Thread Ball manufacturing	5 units	50.00	50.00	100.00
b)	BMR of existing units		2.00	4.00	6.00
6.a)	Tape, lace, Braid & Webbing		2.00	4.00	6.00
b)	BMR of existing units		0.50	1.00	1.50
7.a)	Hosiery & knitting		20.00	50.00	70.00
b)	BMR of existing units		10.00	12.50	22.50
8.a)	Readymade garments		88.00	112.00	200.00
b)	BMR of existing units		5.00	10.00	15.00
9.a)	Sericulture, Reeling & Filature including Ericulture	50 power looms 2500 Handlooms	120.00	145.00	265.00
b)	BMR of existing units		2.50	5.00	7.50
10.a)	Waste cotton spinning & manufacturing Absorbent cotton	23 units	68.70	68.70	137.40
b)	BMR of existing units		4.00	10.00	14.00
11.a)	Handlooms	50,000 looms	75.00	1.00	76.00
b)	BMR of existing looms		3.00	0.50	3.50
12.	Manufacturing of stretched/Texturised/ Twisted Nylon yarn	4 units	20.00	20.00	40.00
13.	Wollen & Worsted yarn	3200 Spindles 20 looms	20.00	20.00	40.00
14.	Twine & fishing net	10 units	25.00	25.00	50.00
TOTAL INVESTMENT IN PRIVATE SECTOR			1,298.10	1,444.50	2,742.60

Apart from the above there is vast scope for setting up 100% export oriented textile industries in the Export Processing Zones of Bangladesh. Such a zone nearby the Sea Port and Airport of Chittagong has already been developed with necessary facilities and has been inviting both foreign and local entrepreneurs for investment.

RISING POPULARITY OF MAN-MADE FIBRE

In Bangladesh till the end of 1950s cotton was the most popular fibre being used in textiles, with the dawn of the sixties polyamide fibre entered into the field of textiles and enchanted the people to fashionably wear garments made of this fibre. But in the seventies Polyamide fibre's popularity for apparels shrunk seriously. It has, however, attained a cozy accommodation in the fields of twine for fishing Net, Socks and Mosquito Nets. The usage of Polyester has been gradually rising. More and more people are using polyester and polyester + cotton blended clothing. It seems that the use of polyester will continue in the country for quite considerable span of time. Recently Acrylic has started to drive out the use of wool.

Candidly but laconically speaking, in Bangladesh coming are the days when man-made fibres will have more potential market while the market of natural fibre is not likely to grow with any accelerated velocity.



