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SOME POST-WAR PROBLEMS OF JUTE

BY

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CONSUMPTION of jute has been considerably reduced owing to the war. Although jute is an important raw material for the war, its use for war purposes has not been sufficiently large to offset the fall in civilian consumption. This may be seen from the following table:—

World Consumption of Jute

(Lakhs of bales of 400 lbs.)

Season July—June	Consumption
1936-37	126
1937-38	113
1938-39	110
1939-40	113
1940-41	79
1941-42	88

In the third year of the war, the total consumption of jute fell by about a quarter of the pre-war consumption. The reduction in civilian consumption must have been much greater than this. Though no precise estimate of it is possible for want of rele-

vant information, a few facts are noted in this connection.

Exports of raw jute and jute goods to the enemy and enemy-occupied countries, which in peace-time accounted for about 30 per cent. of the total world demand, have been completely stopped. In 1941-42, about 11 lakhs of bales of jute were consumed in India for war purposes. In the United States the civilian consumption of new jute bags has been reduced to half that of 1941, while the Government there is building up a large stock pile of raw jute and burlap from the available supply in the country. If the jute requirements for war purposes of the other Allied countries are also taken into consideration, it may not be wide off the mark to say that the total civilian consumption of jute (excluding secondhand products) is at present about half the pre-war consumption.

Thus the main problem of jute in the post-war period will be to increase its consumption to double the present rate of civilian consumption. The solution of this problem is dependent on a number of factors, some of which will be discussed below.

TRANSPORT

The reduction in the civilian consumption of jute has been brought about not by a fall in the actual demand for jute but because the demand cannot be made effective on account of transport difficulties. The civilian demand for jute in the Allied and neutral countries continues to be large and keen. But the demand can only be partially met because of insufficient shipping space available for exports of raw jute and jute goods from India. The cessation of hostilities will remove this difficulty, and the flow of raw jute and jute goods to countries overseas may be expected to resume its normal course. It may well be that with the progress of the war, easier conditions will prevail with regard to the shipping position, which may have a favourable effect on the jute trade. But many things may hamper the fulfilment of this expectation.

MARKETS

No other country in the world has got the natural advantages necessary for growing jute in large quantities. India, therefore, grows jute for the whole world. In times of peace about 85 per cent. of the total demand for jute, either as raw material or as manufactured goods, comes from abroad. The war has considerably restricted the market for jute. The following table shows the distribution of the demand for jute and the changes brought about by the war:—

World Demand for Indian Jute and Jute Goods

Countries	Average of 1936-37 to 1938-39 (April-March)		1941-42 (December-November)	
	Lakhs of bales	% of total	Lakhs of bales	% of total
Allied and Neutral (excluding India)	62.9	54.0	53.8	65.0
Enemy and Enemy-occupied India	35.5 18.0	30.5 15.5	— 29.0	— 35.0
TOTAL ..	116.4	100.0	82.8	100.0

It appears from the above table—

- (1) that the reduced consumption in the Allied and neutral countries has been more than offset by the increased consumption in India; and
- (2) that the reduction in the consumption of jute equals on balance the loss of market in the enemy and enemy-occupied countries.

With the ending of the war, it may be expected

- (1) that war-time restrictions will be removed and a major part of the markets, which is now cut off, whether in the enemy and enemy-occupied countries or in the Allied and neutral countries, will again be available for exports from India; and
- (2) that the Indian consumption will be reduced to the peace-time level.

But things may not turn out to be as smooth as this. Jute substitutes, which are being grown in different parts of the world under the stress of the war, may hamper the complete restoration of the jute trade to its pre-war level. The opening up of new markets and the extension and development of the existing markets may become a matter of great importance for the post-war rehabilitation of the jute trade. The first step in this respect is to explore the potentialities of the Indian market for absorbing jute goods. It is with this end in view that the Indian Central Jute Committee has recently started an investigation of the Indian market for jute goods.

SUBSTITUTES

The next important step in this direction is a study of the economics and technology of the substitutes particularly with two objectives, viz.,

- (1) to assess the danger to the jute trade from each of these substitutes; and
- (2) to suggest improvement in the technology of jute goods with a view to improve their quality and reduce their price.

The Indian Central Jute Committee has undertaken an investigation on this point, but has to face great difficulties in getting facts in these days.

There is no doubt that substitutes have assumed great importance during the war. But forecasts about their future are premature. It is, however, important to note some tendencies in this respect.

If the war lasts long enough, the rationing of jute in the most important jute-consuming countries may decrease its subsequent peace-time importance, because of the introduction of substitutes to which the consumer may become accustomed by use over a sufficiently long period of time. This additional stimulus may even result in the development of a superior product made

of substitutes. Moreover, the abnormal war demand for substitutes may also increase the productive capacity of the substitute industries to such an extent that at the end of the war these industries will be forced to seek new markets in order to avoid a severe slump or may be kept up by tariffs and other similar devices. It is also worth noting that the Governments of some of the countries concerned are already planning to ensure the use of substitutes in place of jute even after the war. On the other hand, it may be recalled that in the last War also there was a search for jute substitutes in a number of countries. Several substitutes were found, but their cost of production was too high to compete with Indian jute. Consequently, these attempts, with the exception of a few, were given up after the War.

Another significant development in this war has been the attempt to grow jute on new territories. Experiments have now been initiated in Brazil, Argentine and the Soviet Union to grow jute on a commercial scale. It remains to be seen whether jute can be grown in any appreciable quantities in these countries and how far jute grown in these countries can compete in quality and price with Indian jute.

NEW USES OF JUTE

The third important step in this direction is to explore new avenues for the use of jute. Experiments made abroad before the outbreak of war have already shown the possibility of using jute along new lines. The war itself has necessitated the manufacture of specialties such as the jute-cotton union fabric, jute tents, etc. Some of the Indian jute mills are now engaged in the manufacture of specialty fabrics, such as furniture material, scrim cloth, carpets, tarpaulin, etc. Readers of the Indian Central Jute Committee's *Monthly Bulletin* must have read about the promising and in some cases partially successful experiments in the Committee's Technological Research Laboratories to use jute in place of hemp and flax or for making garments or as a base for making file boards, or containers, etc. It is important to note that the war, while intensifying the search for substitutes of jute in many foreign countries, has at the same time created opportunities for trying jute in hitherto untried lines. The fullest advantage should be taken of such opportunities for directing the use of jute to the manufacture of new products or

as substitutes for other fibres whose supplies in India have dwindled owing to the war. This subject forms an important part of the research programme of the Indian Central Jute Committee.

AGRICULTURE

Last, but not the least, is the question of Agricultural improvements. It is obvious that improvement in the quality and yield of the fibre will enhance the competing power of jute. This aspect of the question, though sufficiently important in itself, has acquired enhanced importance on account of the developing menace of substitutes. The agricultural research programme of the Indian Central Jute Committee keeps this in full view.

SUPPLY OF JUTE

One of the most difficult problems of jute has been the supply of raw jute. Even before the war, the jute market was seriously upset many a time owing to a bumper crop or an excessive supply against a reduced demand. Such maladjustments not only dislocate the jute market but also seriously affect the economic stability of the jute grower. The problem of supply still awaits a satisfactory solution. The war, however, has given some valuable experience. The bumper crop of 1940 was followed by compulsory restriction of the crop in 1941 and 1942. In the face of dwindling demand for jute the scheme of crop control initiated by the Government of Bengal has given fairly satisfactory results. Prices of raw jute have been well maintained and supplies have been fairly adjusted to demand. The manner in which this new weapon of crop control will be used in the post-war period is a question of first-rate importance to the future of jute. In order to throw some light on the problem of crop control, the Indian Central Jute Committee has undertaken an investigation into the elasticity of demand for jute.

CONCLUSION

The two most important problems likely to confront jute in the post-war period are: competition from substitutes on the demand side and control of the jute crop with a view to adjust supply to demand. It is clear that if jute goods are to recapture the lost ground after the war, immediate attention is necessary to the possibilities of making them cheaper and better and also more varied so that wider markets may be opened up.