



Static or Dynamic- The Analysis of Handloom Industry of Assam

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ABSTRACT

The handloom industry of Assam demonstrates the richness and diversity of Indian culture. It provides livelihood to millions of weavers and craftsmen in rural areas. Through this research paper on handloom industry in North East India(Assam), we intend to analyze the rudimentary problems faced by customers, retailers and weavers of the handloom product in the state. The availability of products, improvement in the quality and durability of colours, innovative design are a few of the challenges. After examining the obstacles, the objective is to enumerate the expedient measures, which, if followed might help in the revival of the authentic glory of the state. Random purpose sampling has been used, and primary data from the customers, retailers and weavers of Assam has been collected through the means of structured questionnaires, interviews, focus group discussions and observations. Thereafter, we have suggested appropriate measures to provide a sustainable economic growth to local artisans and manufacturers so as to improve the overall productivity of this industry. The paper also aims to present to the Government of India, which claims the handloom industry to be a sunset industry, a meticulous plan of action through which it can take a step forward to preserve and promote the North-Eastern handloom Industry, which acts as an asset to our economy.

Keywords: Handloom industry, weavers, retailers, customers, marketing strategy, raw material, finance, Assamese silk

INTRODUCTION

The handloom industry forms a part of the cultural heritage of India and is unparalleled in its flexibility and versatility, blending myths, faiths, symbols and imagery. It is one of the oldest cottage industries in India .The handloom industry has periodically been enveloped in crisis particularly during the past couple of decade. This has resulted in the erosion of rural livelihood in weaving and shift of labor force to other sectors, thus leading to its breakdown. It has been well established that handloom products has a promising role to

play in the textile market, and given adequate support and protection, it can serve a very large market.

Therefore, this sector is not to be viewed in isolation and as a static part of the economy, rather as a dynamic and efficient decentralized sector which on the one hand is closely integrated with agriculture and on the other with large scale industry.

Box 1: Characteristics of Indian Handloom Industry

- ✚ Largely household-based, carried out with labour contributed by the entire family
- ✚ Labour intensive and decentralized in nature
- ✚ A wide range of fibers like cotton, silk, tassar, jute, wool and synthetic blends are weaved
- ✚ Exhibits considerable diversity in terms of products, organizational base, as well as in relations between actors within the production structure
- ✚ It stands next to agriculture in terms of employment generation as it directly employs 12.5 million people.
- ✚ The sector accounts for 14.9% of the total cloth produced in the country
- ✚ Of the total textile exports of the country, handloom products constitute a small percentage (around 10%)
- ✚ The export of handloom products increased from US dollar 435.38million in 2011-12 to 466.59 million dollar in 2012-13(increase 7.16%).The US provides main international market for the products.

Source: Handloom export promotion council -Statistics

The industry has experienced a significant fall in the last fifteen years. There has been a decrease in the number of handlooms from 34.86 lakhs (1995-96) to 23.77 lakhs (2009-10). According to the Handloom Census (2009-10), the number of weavers has declined to 43.32 lakhs in 2009-2010, from 65 lakhs in 1995-96.

In hindsight, because of lack of adequate financial support, the socio-economic conditions of the majority of weavers have not been in a good position. They are paid lesser than an equally skilled worker, say carpenter or mason which has resulted in the weavers giving up their profession and going to alternate works. Challenges from the mills and powerloom sectors reduced the production and the demand of handloom textiles. Also, Global recession in 2008 led to the decline in demand of handloom products in the global market.

On a positive note, the proportion of full-time weavers was found to have increased from 44% (2nd census) to 64% (3rd census), the number of days worked by weaver households has increased from 197 person days(2nd census) to 234 person days(3rd census).

Table No. I: Distribution across different States

Country/State	No. of handloom weavers and Allied workers	No. of Handlooms
Assam	16,43,453	11,11,577
West Bengal	7,79,103	3,07,829
Tamil Nadu	3,52,321	1,54,509
Manipur	2,18,753	1,90,634
Andhra Pradesh	3,55,838	1,24,714
India	43,31,000	27,33,000

Source: Handloom census of 2009-10

Table 1 shows that the handloom industry is not spatially distributed but is concentrated in a few states only. The top 5 contributor states: Assam, West Bengal, Tamil Nadu, Manipur, Andhra Pradesh constitute 77.3% of the total number of handloom workers and weavers. Also, their contribution in number of handlooms is 9.12% of the total. Assam alone contributes 37.9% of the total handloom weavers and 40.6% of total number of handlooms of the country.

The North-Eastern States accounts for the highest concentration of handlooms in the country. Over 53 per cent of the looms in the country and more than 50 per cent of the weavers belong to the North-Eastern States (Box 2). So much importance is attached with the industry that it is customary for every young Assamese girl to acquire the skill to weave, in order to qualify for marriage. It also plays a very important role in the socio-economic development of the State. Assam is a proud owner of more than 13 lakh looms out of the total 28 lakh looms in the country, having the largest number of weavers and handlooms in the whole of India. Out of 13 lakh looms, 5.7 lakh are used for semi-commercial weaving, 4.5 lakh as domestic looms and about 2.87 lakh for commercial weaving.

Box 2: Few facts about Handloom industry

- ✚ Assam contributes 99 per cent of Muga silk and 63 per cent of Eri silk in country's total production of Muga and Eri, respectively
- ✚ The industry for generations has been the major source of additional income for the rural women of Assam and women comprise of 60% of total weaver population
- ✚ About one-third of Assam's 1.2 million weavers are organized into about 3,744 societies registered under handloom cooperative societies
- ✚ Single loom household units are common in the State
- ✚ The major weaving districts of vanya (wild) silks are Kamrup (Rural), Nalbari, Udalguri, Baksa, Kokrajhar, Nagaon, Morigaon, Dhemaji, Lakhimpur, Golaghat, and Mangaldoi

There are different varieties of Assam handloom products. Gamocha (Assamese towel), Mekhela Chaddar (Assamese sari) and Laichampi (quilt-like material) are the trademark of the traditional products. Various types of Assamese silk and a few handloom products have been briefly described as follows:

- **Muga Silk**

The King of Silks, muga is golden yellow in appearance and is extracted from semi-domesticated silkworm *Antheraea aassama*, common to this region.

- **Pat Silk (Mulberry silk)**

Paat, a variant of the Muga silk, is extracted from silkworms that are raised exclusively on the leaves of Mulberry plants.

- **Eri Silk**

The warm Eri silk is made by the silkworm *Philosamia ricini*, which harbours on the castor oil plant. Also known as the Endi silk, it is mainly used to make shawls and quilts

- **Gamosa**

It is generally a white rectangular piece of cloth with primarily a red border on three sides and red woven motifs on the fourth.

- **Mekhela Chador**

It is in the form of a sarong- a wrap-around that is folded into pleats to fit around the waist and tucked in. Mekhela Chadors can be made from cotton, muga and paat.

Study Area: Sualkuchi

Sualkuchi is known as 'Manchester of Assam'. It is a multi-caste town under Guwahati Sub-division of Kamrup district. Situated on the North bank of the mighty Brahmaputra at a distance of 30 km West of Guwahati, Sualkuchi is located in the latitude of 26°10'0"N and the longitude of 91°34'0"E. The population is 2,24,381 (according to 2001 census report) and literacy rate is 64%. This is a weaver's paradise, being the largest silk producing village of Assam. The weaving tradition can be traced to the 11th century when King Dharma Pal, of the Pala dynasty, sponsored the craft and brought 26 weaving families from Tantikuchi to Sualkuchi. 73.78% of the households of the town are being engaged with commercial weaving of handloom.

According to official sources currently there are about 17,000 Silk looms working in Sualkuchi and more than 25,000 people are directly or indirectly employed under the silk industry in Sualkuchi. Out of the total production of about 42,19,055 linear meters of silk fabrics in Assam, Sualkuchi alone produces more than 31.00 lakhs linear meters of silk fabrics valuing Rs.9,000.00 lakhs approximately.

OBJECTIVES

The Handloom industry being a part of the Indian culture and tradition, it is one of the oldest cottage industries in India diffused widely through the country. These industries play a strategic role in restructuring and transformation of the economy. In this backdrop, following are the major objectives of the project:

- To find the major problems faced by handloom industry in Assam
- To suggest appropriate measures to preserve and promote handloom industry of Assam

METHODOLOGY

To achieve the aforesaid objectives, data has been collected from primary and secondary sources. However, it is to be noted that each data source has inherent limitations which does affect the pattern of analysis, and thus limits its scope.

Secondary data sources:

- Report of the steering committee, Handlooms & Handicrafts, twelfth five year plan(2012-2017), VSE division, Planning Commission, Government of India.
- Jyoti Narzary, Feb-Mar-Apr, 2013, A study on the challenges faced by the handloom industry in BTAD, Assam, Global Research Methodology Journal, Vol-2, 8th issue.
- Databank.nedfi.com(NER Databank)
- texmin.nic.in

- www.Ncaer.org

Primary data sources:

Random sampling has been used to choose samples. To achieve the objectives of the project, primary data has been collected for weavers, retailers and customers. Structured questionnaire, interviews, focus group discussions and observations have been used to collect the required data.

RESULTS

An Analysis of issues and concerns faced by handloom industry of Assam

In this research paper, we have brought to the fore the issues and concerns faced by the labour intensive handloom industry of Assam. Through our field based research and analysis, we formed the basis for building the strategies and suggestion to improve and uplift this industry.



Figure I: Various Factors pertaining to the Handloom Industry

Weavers

A local survey of 30 weavers, consisting of 10 master weavers, 13 independent weavers and 7 workers, in the town of Sualkuchi of Kamrup district was conducted by our team. Among them, 19 were males and 11 were females. Throughout the survey, we emphasized on certain factors pertaining to the handloom industry. The master weavers hired their workers mainly from Assam.

Table No II: Mode of Finance

Finance	No. of Respondents
Self Finance	24
Borrowed	6
Total	30

Source: Handloom census of 2009-10

Out of 30 weavers surveyed, 24 were self -financed. They used their own savings to set up the weaving business. Remaining 6 weavers opted to take loans from banks by mortgaging property/valuable assets or borrowing money from relatives.

The raw materials used in the handloom industry of Assam mainly include cotton, Muga or the Golden silk, Paat or the Mulberry silk and Eri silk. The raw silk thread is processed, dyed and finely woven into garments which are sold at shops located in the village.

Table No. III: Area of Procurement of Raw Materials

Area	No. of Respondents
Within Sualkuchi	19
Within Assam	0
Other Indian States	8
Other countries	3
Total	30

19 out of 30 weavers procured their raw materials from Sualkuchi itself, 8 from other states of India like West Bengal, Karnataka and Uttar Pradesh. The remaining 3 weavers procured raw materials from other countries primarily China. Most of the raw silk imported from China is sent to Bengaluru for refining. The processed silk is then

transported to Sualkuchi and is used for weaving purposes. Due to changing demands, besides muga, pat and eri silk, tassar silk and polyester fabric has also been introduced in Assam's handloom industry. They are comfortable, affordable, and have almost the same look as that of pure silk varieties. The raw materials are transported from the place of availability to place of utilization mostly through roadways.

Table No. IV: Ways of Procuring Raw Materials

Ways of Procurement	No. of Respondents
Self procured(from local shop)	14
Through intermediaries	11
Contract basis	5
Any other	0
Total	30

14 out of 30 weavers procured raw materials from local shops in Sualkuchi, 11 through intermediaries while the remaining 5 purchased on contract basis.

Table No. V: Price of Raw Material

Price	No. of Respondents
Cheap	0
Affordable	3
Costly	22
Don't know	5
Total	30

According to 22 weavers surveyed, the raw materials are highly priced which is a major concern among them. 3 weavers consider that the price of raw material is affordable and the remaining 5 could not judge the price.

Table No. VI: Number of Working Hours per Day

Hours	No. of Respondents
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Less than 6	0
6-8	10
More than 8	3
Fluctuating	17
Total	30

Weavers in Sualkuchi have acquired their weaving skills through traditional lineage. 17 out of 30 weavers were part time weavers who had flexible working hours. Some of them indulged in other occupations as well. 10 weavers weave around 6-8 hours and the remaining 3 weave for more than 8 hours.

Table No. VII: Source of Design

Source of Design	No. of Respondents
Imagination	6
Traditional	18
Geometry	4
Computerized	2
Total	30

The design of handloom products of 18 weavers was traditional. 6 weavers used imagination to design patterns, 4 used geometry and 2 used computerized design. The weavers used either design albums consisting of design cards (made of cardboard), or their own creativity to design patterns for the products. Design cards are bought by the weavers from the local market. The ethnic design of the handloom products holds great traditional value in the Assamese culture. As per the survey, the color and design sense varies from weaver to weaver. However, today, the designers incorporate patterns and designs based on the recent trends and in accordance with the taste of the newer generation. Handloom Research & Designing Centre at Guwahati supplies new designs and color patterns to the indigenous handloom societies in the state.

Table No VIII: Marketing Area

Area	No. of Respondents
Local market	19
Temporary market(e.g. fairs)	0
	0
Through intermediaries(within and outside Assam and other countries)	11
Total	30

19 out of 30 weavers sold their products in the local market (in Sualkuchi) itself while the remaining 11 sold through intermediaries.

In light of the aforesaid analysis, following are the major problems and issues faced by the weavers:

- **High price of raw material:** As per our survey, most of the weavers said that due to changing climatic conditions and deforestation in the north-east India, the production of muga silk had been affected to some extent. The above mentioned reasons had led to lesser number of silkworms leading to lesser production of muga silk, resulting in rising cost price of the same. The additional transportation cost of transporting raw materials from other parts of India has resulted in rising prices of the raw materials. This has largely affected the handloom industry.
- **Labour Shortage:** In Sualkuchi, the younger generation is focusing more on other occupations and spending lesser time on traditional occupation *i.e.* handloom. They want a better lifestyle and are looking for better employment opportunities in and outside Assam. This has led to shortage in the number of weavers in the handloom industry of Assam.
- **Financial Instability:** The weavers are paid off based on the complication of design that they weave; and also on the number of final handloom products that they produce. For example, weavers are paid Rs.150/- to Rs.800/- per sari on an average based on the detailing of the design on the sari. Most of the workers suffer from financial instability. They have negligible savings. They work on a sustained basis and whatever profit

they earn is consumed to repay loans. This has restricted their economic growth.

- **Power cuts:** There are frequent power cuts in the village of Sualkuchi. Due to this, there is no proper light for weavers to see and perform minute detailing. Thus, the working hours are restricted. This hinders the efficiency of the weavers.
- **Health problem:** Weavers experience health problems due to continuous strenuous physical work required in weaving. They suffer from back ache, muscle cramps, shoulder-pain, etc. Most common health problem faced by weavers are back pain and pain in the feet.

Retailers

A local survey of 25 retailers was conducted in Sualkuchi. There are two types of retailers existing in the handloom market. First, the intermediaries who sell raw materials required during the processing of handloom products and second, who directly sell the finished handloom product to the costumers.

The demand of handloom products is seasonal. Their sales shoot up during the festive season and auspicious occasions. Demand of pure pat is very high among customers. Mekhela Chador of Pat and polyester are dominating the market. But the demand of Muga, 'golden silk of Assam' is quite low due to its high price and availability of substitutes like tassar which look very similar to the original Muga silk.

Table No. IX: Type of Ownership

Ownership	No. of Respondents
Self owned	23
State government	1
Central government	0
Privately owned	1
Total	25

23 out of 25 surveyed retailers were self-owned and 1 was privately owned with negligible bank and government support. The remaining retail outlet was owned by state government.

Table No. X: Source of Supply of Handloom Products

Source of Product	No. of Respondents
Self –produced	8
Purchased	16
Both	1
Total	25

16 out of 25 retailers surveyed purchased the handloom products directly from the weavers. 8 retailers who were master weavers themselves sold their own products as well as products bought from other weavers.

Table No. XI: Type of Product the Retailer Sells

Types	No. of Respondents
Handloom	24
Powerloom	0
Both	1
Total	25

24 out of 25 retailers sold only handloom products. They bought the handloom products from local weavers though some of them had personal weaving units. Only 1 retailer sold both handloom and power loom products.

Table No. XII: Retailer’s Point of View on Customer Satisfaction

	Satisfied	Not Satisfied	Total
Variety of product	20	5	25

Quality of product	15	10	25
Colour of product	22	3	25
Price of product	1	24	25

Most of the retailers felt that their customers were satisfied with the variety, quality and color of the products. Retailers of Sualkuchi face a stiff competition with the silk products produced in Benaras. Products of Benaras are very much similar to those produced in Assam and because of which, Assamese handloom products are losing their market.

Table No. XIII: Retailer's Satisfaction with Profit earned per Product

Opinion	No. of Respondents
Satisfied	20
Dissatisfied	5
Total	25

20 out of 25 surveyed retailers were satisfied with the profit they earned. However, they faced the problem of lack of perpetual succession in their business because younger generations were not willing to take up this business due to low profit margin and thus were not willing to expand their business. The remaining 5 retailers were dissatisfied with their profit.

The following are the major problems and issues faced by the retailers:

- **Stiff competition:** The handloom industry in Sualkuchi faces stiff competition with the power loom industries. Younger generations prefer more of power loom products because of their comfortable fabric, more variation in design and colours, and affordable price. So, a trend of change in consumers' preference can be seen over time.
- **Poor marketing:** Most of the retailers sold only traditional wear (like Mekhela Chador and Gamosas). Thus, the handloom sector of Sualkuchi caters mainly to the needs of the local people. A majority of the retailers who sold handloom products bore all the risks associated with the business of procurement, marketing and sale, with obvious consequences. Relieving them of these uncertainties can only be achieved by developing reliable and sustainable marketing networks with

the involvement of the private sector. Retailers want a sort of big box store for selling their handloom products where customers can get all handloom products under the same roof.

Customers

We did an extensive field work by interviewing 30 customers all over Guwahati and Sualkuchi. Gamosa and Mekhala Chador are the most common handloom products bought by the customers in Assam. They are in high demand especially during the festive season (Bihu) and during weddings.

Table No. XIV: Variety of Silk preferred by Customer

Variety of Silk	No. of Respondents
Muga	12
Eri	0
Paat	23
Any other	0
Total	35

Paat was preferred by 23 out of 35 customers because of its comfortable fabric and availability in many varieties. Muga was preferred by 12 customers, however its high price limited its customers.

Table No. XV: Price of the Handloom Products

Ratings	No. of Respondents
Expensive	20
Affordable	15
Cheap	0
Any other	0
Total	35

20 out of 35 customers rated the price of the handloom products as expensive. 15 found the price affordable.

Table No. XVI: Product Preference

Type of Product	No. of Respondents
Handloom	25
Powerloom	10
Both	0
Any other	0
Total	35

25 out of 35 customers preferred to use handloom products. But, over the years, power loom is slowly taking over the handloom sector. The remaining 10 who were mostly youngsters preferred to use power loom products.

Table No XVII: Reason for Preference

Reasons	No. of Respondents
Comfort	14
Traditional ethnic design	17
Color	4
Any other	0
Total	35

17 out of 35 surveyed customers preferred handloom products over power loom products because of the ethnic design and traditional importance of handloom products in Assamese culture. 14 favored handloom because of its comfort. The remaining 4 liked their color.

Table No. XVIII: Ratings

Rating	Quality	Color	Design	Marketing
5	4	17	11	1
4	10	12	18	5
3	17	2	6	14
2	4	4	0	15
1	0	0	0	0
	35	35	35	35

There is a trend of wearing handloom clothes during any auspicious ceremony in the Assamese culture. That is why there is a high demand of handloom products all over Assam.

According to the customers, no sort of advertising is required in Assam as its cultural significance would never die and hence handloom products would always be in demand. The customers are satisfied with the color and design of the product but, the quality of the handloom products is deteriorating day by day and hence it is unable to ignite its demand in the national and international market. The price of Assamese silk has been increasing at an alarming rate which has resulted in the introduction of mixed silk garments that give the same look as pure silk but are relatively cheaper.

DISCUSSION

The handloom industry in the north-east region has developed a lot over a period of time. Since most of the handloom units are run either as sole-proprietors or on partnership basis and the owners lack the much needed professional outlook, many of them are not even aware of the modern techniques of marketing, such as product development, brand promotion, advertising market, surveys and demand forecasts. To maximize their sales volume, it has become very important to know how one can get maximum profit by using different marketing strategies. For increasing the export and to provide satisfaction to customers, there is a need of improving and promoting marketing practices.

CONCLUSION

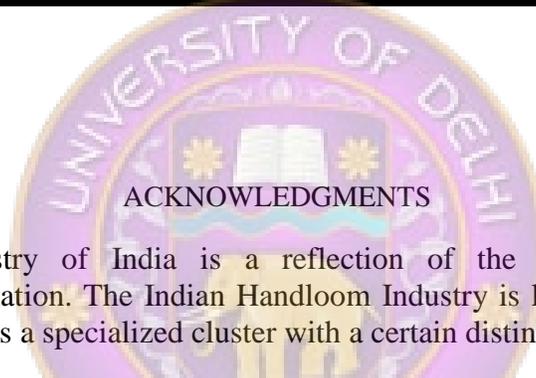
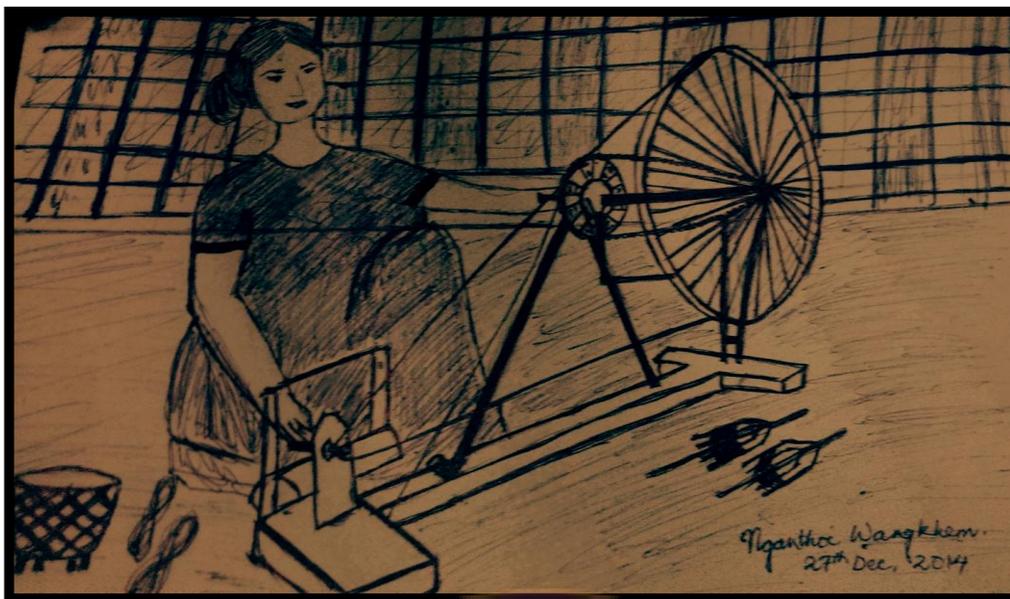
The handloom industry in Sualkuchi has been the epicenter of handloom activities in the past century. There are various factors of production namely land, labor, capital and raw material. Sualkuchi has mostly been dependent on its own population for provision of skilled labour. The skill is mostly taught by family members. The land is owned by them in a majority of the cases. Also, the capital required for installment of business or purchasing equipments/raw materials etc is acquired either through loans (from banks or a mechanism they call ' Baaki') or through personal savings. However, currently the

greatest problem is faced while purchasing raw material which is mostly imported from other Indian states (except for muga silk). The price of raw material has been constantly increasing over the years due to environmental factors which in turn is reducing the profit earned by the weavers. Several weavers, unfortunately but shrewdly believe that the industry in Sualkuchi is currently in its pen ultimate years. Despite all this, the weavers share amongst themselves an unusual satisfaction and complacency, which is hard to find, given the circumstances.

In Sualkuchi, there is a demand for their unique and traditional product among the local people of Assam. However, once we move out of this realm the situation is bleak. The product is mostly sold based on reputation and marketing is minimal. Further, the current demand goes unmet because the weavers don't produce enough due to low wages, lack of professional craftsmen, high competition and low morale. Hence, based on the above, the industry displays characteristics of a static industry that is not changing with the changing external factors.

Measures such as providing an environment for cultivation of silk worms, skill development programs that educate weavers about the need of the customers, big-box stores for providing all goods under one roof and promotion of handloom products in the entertainment sector can be taken. Thus, immediate and concrete steps need to be taken to prevent the industry from extinction.

1. Weavers want the government to promote environmental friendly sericulture centres.
2. Weavers want subsidy on raw materials so that they can buy them at an affordable rate and are not forced to shift their occupation pattern.
3. Provision for soft loans should be encouraged for making the lending process more feasible.
4. Proper and wider implementation of Revival Reform and Restructuring Package in which government has approved weaver credit card under institutional credit component, providing margin money assistance at Rs 4200 per weaver 3% interest subvention for 3 years.
5. Government funded skilled development programs should be organised at regular intervals and awareness should be spread among the weavers about the importance of such programs. As per our observation, there was negligible participation of weavers in such programs. Skill development programs will help the weavers to increase their efficiency, and will make the weavers aware about the change in the pattern of demand of handloom products both nationally and internationally and enable them to adapt to these changes by keeping their traditional value intact.
6. Customers are demanding facility of customization of handloom products, so the weavers should work on this feature.



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The Handloom industry of India is a reflection of the heritage and excellent craftsmanship of our nation. The Indian Handloom Industry is largely dispersed and its pocket has developed as a specialized cluster with a certain distinction of its own.

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