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**THE
SILK INDUSTRY OF ASSAM**

**A CASE STUDY
IN THE SUALKUCHI CLUSTER**



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TITLE OF THE STUDY

THE SILK INDUSTRY OF ASSAM : A CASESTUDY IN THE SUALKUCHI CLUSTER

Executive Summary

Assam occupies unique position in Sericulture by producing all the four varieties of Silk, viz. Mulberry., Muga, Eri and Tassar. As a matter of fact ancient Karupa or Assam held monopoly in the world in the production of Muga. The North Eastern States including Two districts of West Bengal still maintain this monopolistic position.

It is well known most of commercial looms , weaving particularly Mulberry and Muga fabrics are concentrated since time immemorial in Sualkuchi, a locality comprising now two census towns, Sualkuchi and Bamun Sualkuchi, 32 KM west of Guwahati. It provides residence to 21,252 local people excluding the migrant weavers as per 2001 census. The looms are engaged in weaving traditional fabrics used mainly by the female folk, viz. Mekhela and Chadar, garments for ladies respectively for lower and upper part of the body, blouse piece, plain pieces or thans or plain sheets of 10m length which may be stitched as Mekhela, shirt, chadar etc. Besides traditional products for Assamese female folk , some looms are also engaged in weaving Dhara and Jainsen, the traditional female dress of the Khasi and Jaintias of present Meghalaya. Some of the looms are weaving Sarees and some of the Muga Sarees were reportedly sold in Kolkata market during the sixties of the last century.

For designing the fabrics both Jacquards and Dobbys are used, Jacquards for border floral designs while Dobbys are for designing middle part of the cloth. But as Jacquard weaving takes a lot of physical toil of the weaver, now-a-days only Dobbys are used and floral borders of the cloth are woven separately in the same piece of Chada or saree and stitched by the tailors. The designs are drawn in paper by design specialists, then hard board cards are punched and fitted to the Dobby and while shedding the warp, picking or throwing the shuttle through the warp weaves the design by beating the sley. Besides this mechanical designing, small flowers all over the piece of the cloth are also done by the skilled hands of the weaver who selects the necessary picks and weaves the art threads. Thus weaving process is very labour intensive. Weaving of Mekhela takes about 2 days labour Chadar takes 3 to 4 days while a Saree takes a weeks time. Wages are based on number of floral picks woven in the piece of fabric plus the general weaving charge of the piece of cloth. The punch card indicates the number of designs with picks of 100 called a unit or Muthi and wages are paid on the basis of units.

It is to be mentioned that Paat and Muga is mostly weaved in Sualkuchi, Tassar is also done by few while Eri is not woven locally. Some traders of Sualkuchi obtain Eri products from Palasbari/ Mirza for their sale. The Paat yarn is brought mostly from Bagalore, Tassar from Kolkata while Muga yarn is reeled here by buying cocoons from Upper Assam, Bako, Garo Hills etc. The number of Muga looms however depends on availability of Muga cocoons. As per our previous surveys Muga Looms in Sualkuchi has declined from 806 in 1970-71 to 318 in 1980-81. According to our present survey (April to July, 2002) it has increased to 2642 i.e. by 831 pc over 1980-81.

The use of Tassar in Sualkuchi started in 1980s. Price of Tassar is half of that of Muga and ordinary customers can not make-out the difference, further it is readily available. Tassar is generally used as warp and Muga is used as woof and the fabric is sold as Muga at a very high price. This deceptive trend has tempted lots of master weavers to adopt Tassar along with Muga. This sale of Tassar fabrics as Muga has brought down the credibility of Muga fabrics of Sualkuchi. The Central Silk Board office at Sualkuchi has established a testing machine , which can easily detect the purity of Paat, Muga , Tassar and Eri. This testing certificate is required mainly for export purpose. Three dealers, one from Sualkuchi and Two from Mirza are now-a-days exporting Muga yarn to Japan and they are doing their business with honesty.

Number of Silk Looms in Sualkuchi

Year	1961	1970-71	1980-81	2002
Total No. of Looms	1200	2165	2998	16717
Paat Looms (Active)	-	1359	2680	9738
Muga Looms (Active)	-	806	318	2645
Tasar Looms	-	-	-	1384
No. of Households with looms		1077	1478	2968

The no.of looms have increased over the years and average number of looms per household was little more than 2 in 1980-81 but it has increased to 5.63 in 2002.

The Sualkuchi cluster covering 15 villages around Sualkuchi within about 100 Sq. Km began to form since seventies of last century because of its demonstrative effect. Comparatively higher income from the profession has led to vertical occupational mobility from agriculture and other cottage industries. Comparatively higher wages of weaving has also attracted over 10,000 migrant weavers including more than 5000 Bodo female weavers from different districts of Assam. The active silk and cotton looms in the cluster has provided direct employment to more than 23000 weavers , about 8000 helpers and more than 4000 persons in on management thus around 34000 people are earning their livelihood with a comparatively better standard of living. It is a prominent contribution of the handloom industry.

The census like survey conducted during 2002(April to July) had enumerated 27,787 looms in the cluster of 16 villages including Sualkuchi. This is a tremendous growth of handlooms within a period of 30 years. It is pertinent to mention here that out of 11,794 households in the cluster 8,679 or nearly 73 pc of the households are having looms varying from 1 to 10 in the villages while in Sualkuchi the number varies from 1 to 25.

Sl. No.	Villages	No. of House Holds	No. of House Holds with Looms	Total no. of Looms	No. of Silk Looms
1	Gandhamou	524	207	554	368
2	Bongsor	1035	619	1486	1261
3	Sanpara	176	119	198	196
4	Bathan	477	349	1055	1024
5	Srhati	179	114	351	364
6	Sarulah	385	327	997	857
7	Barlah	171	146	385	311
8	Kayatol	113	82	185	215
9	Halogaon	493	349	530	283
10	Bamundi	1009	739	1159	493
11	Siliguri	257	217	244	169
12	Hardia	382	333	405	143
13	Ramdia	2212	1845	3159	1188
14	Tokradia	210	138	186	148
15	Sobanshah	148	127	176	135
16	Sualkuchi	4023	2968	16717	16717
		11794	8679	27787	23872

The Raw Material Consumption found:

1	Mulberry Yarn	2.68 Lakh Kg
2	Tassar Yarn	0.26 Lakh Kg
3	Muga Yarn	0.42 Lakh Kg
4	Art Thread	1.80 Lakh Kg

The basic products manufactured in the looms are as generally of the following measurement:

Sl. No.	Name	Length(m)	Breadth (m)	Size in sq. mtr.
1	Mekhela	2.50	0.80	2.00
2	Chadar	2.75	1.00	2.75
3	Riha	2.50	0.80	2.00
4	Blouse Piece	0.90	0.80	0.72
5	Saree	5.50	1.20	6.60
6	Thaan	10.00	0.80	8.00

It has been observed that on an average one loom weaves about 13.67 sq.m in a month. The working days of the looms varies from 9 months to one year.

Fabric Production in the cluster (per Annum)

Sl. No.	Name	Nos/ sets in Lakhs	Production of fabric in Lakh sq. Mtr
1	Mekhela Chadar Blouse set	3.37	18.43
2	Sarees	0.78	5.14
3	Thaans	0.76	6.08
4	Khasi Dress	-	0.40
Total Fabrics			30.05

Gross out put as defined by the Central Statistical Organisation of Govt. of India is the ex- factory value of the products manufactured during a year. In Sualkuchi cluster the ex factory value of Mekhela Chadar Blouse set is around Rs. 1400, Saree is Rs.2000/- and Thaan is about Rs. 1000/-. On thisbasis the total value of MCB fabric is about Rs. 4718 Lakh, Saree Rs. 1560 Lakhs and that of Thaan is about Rs.760 Lakhs. Thus total gross output in a year is about Rs. 7038 Lakh and when added to Rs. 22 Lakhs of Khasi dress total amount is around Rs. 7060 Lakhs.

The main difficulty in marketing lies in the seasonality of demand . The demand for fabric rises on the eve of Durga Puja Festival i.e. September-October and in marriage seasons from January to April. Demand for products fall for about four months that is from May to August. The small loom owners (48%) particularly with one to three looms suffer a lot during these off seasons. They make cash purchase of yarn and art threads in small quantities at a time; They also need cash to run their family and hence are compelled by circumstances for distress sale to the traders. Sometime they are not able to cover their wages even. The Govt. Societies like Govt. emporium, ARTFED and a procurement centre of Dept. of Textile and Weaving could not come forward to help in distress sale. It has been found that the Govt. offices are now closed and occasionally some officers of these agencies come but they buy from the open market. The role of co-operative Societies are also negligible. There are 16 Registered Co-Operative Societies, Only 3 are having their Sales Outlets in Guwahati and some other towns. As they accord preference to their shareholders , they fail to help the poorweavers. Most of the sales are now controlled by the traders based in Guwahati and some other prominent towns.

Marketing of the Products can be summarized as follows:

A. Sold to Silk stores	58.53 pc loom owners
B. Sold through Agents	30.80 pc loom owners
C. Sold to Co-operative Societies	3 pc loom owners
D. Dependent on putting out system	7.67 pc loom owners
E. Credit Sale	29 pc big loom owners
F. Distress Sale	48 pc loom owners

The Fixed Capital and Working Capital Investments are Rs. 2140 Lakhs and Rs. 1150 Lakhs i.e. a totalof Rs. 3290 Lakhs. Major part of the investment comes from primitive accumulation by the loom owners , a part of it also comes from credit made available to

them by the local bank branches. Central Bank of India Established its branch in 1970. This was followed by 3 more branches and a branch of Pragjyotish Gaolian Bank. These bank have advanced and amount of Rs. 860 Lakhs till March 2003 to 3271 accounts of SSI sector. This constitutes only 26.13 pc of the fixed and working capital investment. tHe no. of accounts financed form only 43 pc of total weaving units of 8679 in the cluster. The Bank Finance in the cluster is as follows as on March,2003:

Sl. No.	Name of the Bank & Branch	Total Advance Rs. In Lakh	Total no. of Accounts	Advance to SSI sector Rs. In Lakh	No. of Accounts in SSI Sector
1	Central Bank of India, SM Road	512	1329	403	1057
2	CBI, Bapuji Path	232	456	163	374
3	Assam Co-Op. Apex Bank ltd.	103	525	66	1065
4	P G Bank	343	1268	153	798
5	P G Bank, Bamundi	157	866	75	427
		1347	4444	860	3721

A sample survey done showed that 68pc of the Silk units had no bank loans but 62 pc or more than 2900 of them were reportedly in the need of the bank credit. 36% or 1700 of the loom owners need the credit for expansion, 17 pc wants to open sale outlets and the rest 9 pc desires bank finance for miscellaneous . The 36pc expansion need is around Rs.225 Lakhs. Covering the other aspects the total additional investment potentiality of the Banks come to Rs.585 Lakhs.

The increase in number of Product diversification is the urgent call of the day. Production of bed sheets, bed covers, sofa covers, door and window screens with attractive designs like Kaziranga depicting one horned Rhino have great potentialities for export. The problems faced by the Silk industry of the cluster are as follows:

1. Yarn Supply	6. Labour shortage
2. Distress Sale	7. Technology Upgradation
3. Financial Problems	8. Calico Printing
4. Space for Workshed	9. Loom Accessories etc.
5. Lighting	

Some Basic information about the cluster:

A. Employment :

✚ Employment in the industry	33924 persons
✚ No. of loom owners (management)	4715 persons
✚ Weavers	19168 persons
✚ Helpers : Hired -2148, domestic 5622	7770 persons
✚ Yarn Winders and reelers	2271 persons
✚ Employment per loom	1.76

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B. Classification of Weavers:

Sl. No.	Category of weavers	No.	%ge
1	Hired Weavers	13827	72.13
2	Family Weavers	5341	27.86
3	Female Weavers	10496	54.75
4	Male Weavers	8672	45.24
5	Bodo-Girl weavers	5343	27.87
6	Non Bodo Girl Weavers	13825	72.12

C. Family Background of hired weavers :

Sl. No.	Category of weavers	%ge
1	Agricultural Labour Family	61
2	Petty traders Family	28
3	Marginal peasant family	11

D. Annual Income for weavers:

Sl. No.	Category of weavers	%ge
1	Income upto Rs. 12000/-	54.50
2	Income Upto Rs. 15000/-	42.50
3	Income upto Rs. 18000/-	3.00

E. Investment in Looms :

Sl. No.	Investment	Amount
1	Fixed Capital per loom	Rs. 9000/-
2	Total Investment in Sualkuchi	Rs. 1504 Lakhs
3	Total Investment in other villages	Rs. 636 Lakhs
	Total Investment in the cluster	Rs. 2140 Lakhs