

PROBLEMS AND PROSPECTS OF INDIAN SERICULTURE INDUSTRY

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ABSTRACT

Sericulture is an agro-based and economically rewarding enterprise consisting of several sets of activities and plays a predominant role in shaping the economic destiny of the rural people with lot of employment potentiality. The production process of silk fabric contains a long chain of interdependent operations i.e. cultivation of mulberry, silkworm seed production, silkworm rearing, silk production, twisting, warp and weft making, dyeing and printing, spun silk production, finishing of silk fabric, designing of silkgarments etc., that provides medium of livelihood to rural and semi urban people. India is blessed with favourable climatic conditions throughout the year and availability of human resource remained the advantage to the Indian silk Industry. Sericulture provides rich dividends with low investment and profitable return within short gestation period and provides employment throughout the year. It is obvious that, sericulture plays a pivotal role in economic development of the country by generating employment, income, as well as foreign exchange.

In view of the importance of sericulture enterprise for the rural development as well as its cultural bondage, the paper tries to discuss the significance of sericulture and strategies to be taken for the sustainable development of Indian sericulture industry in the context of globalization.

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Introduction

The silk industry encompasses different on-farm and non-farm activities, with diversified nature of skills, involving heterogeneous group of people, bringing people of various walks of life together work for the production of silk. Sericulture is continuous activity and employment is available throughout the year. Sericulture involves low investment with frequent income with 5-6 crops per annum once the mulberry plantation is established it will continue to yield consistently for 15-20 years with minimum expenditure for maintenance. Division of mulberry garden into plots with alternate harvesting timings could enable the sericulturists to carryout silkworm rearing throughout the year continuously with 10-12 crops/year. Basic sericulture activities are village-based; hence migration of people from rural to urban areas in search of jobs can be minimized.

In India, Sericulture is not only a tradition but also a living culture. It is a farm-based, labour intensive and commercially attractive economic activity falling under the cottage and small-scale sector. It particularly suits rural-based farmers, entrepreneurs and artisans, as it requires small investment, but with potential for relatively higher returns. The crux of India silk industry lies with the Indian traditional states of Karnataka, Andhra Pradesh, Tamil Nadu, Jammu & Kashmir and West Bengal. Over 97% of mulberry raw silk production is contributed by these five traditional states. Karnataka is the pioneer state in production of silk, contributing nearly 43% followed by Andhra Pradesh (35%), Tamil Nadu (11%) and West Bengal (8%) of total mulberry raw silk production in the country. Now, as a result of growing realization, sericulture is gaining ground in non-traditional areas too. Sericulture industry provides employment to approximately 7.65 million persons in rural and semi-urban areas in India. Of these, a sizeable number of workers belongs to the economically weaker sections of society, including women.

The very nature of sericulture industry with its rural based, on-farm and off-farm activities and enormous employment generation potential has been recognized as one

of the most appropriate avenues for socio-economic development of a largely agrarian economy like India. In view of the multifold advantages, sericulture has come to be regarded as one of the means of alleviating rural poverty and ushering rural prosperity.

Prospects of sericulture Industry in India

- Silk is a way of life in India, occupied a prime position and carries an aura of royalty. It has a sacred place in cultural heritage of Indians and it has merited mention at several places in the epic scriptures. It has also become the religious tradition for the Indian brides to wear silk saree in the marriage ceremony. Truly, silk has a fine blend with the cultural heritage of the Indians. Silk is indispensable in ceremonies and religious rituals, being a must in weddings and festivals.
- Traditionally, India dwells in the rural areas its economy is largely dependent on the success of agriculture and allied farm activities as more than 70 percent of the people's livelihood security is depending on this sector. Sericulture as an agro-based is an economically rewarding enterprises consisting of several sets of activities and plays a predominant role in shaping the economic destiny of the rural people.
- India being blessed with prevalence of favourable climatic conditions, mulberry is cultivated in almost all states. The crux of India silk industry lies with the Indian traditional states of Karnataka, Andhra Pradesh, Tamil Nadu, Jammu & Kashmir and West Bengal. These five states collectively account for 95% of the total area under mulberry cultivation and 92% of raw silk production in the country. Now, as a result of growing realization, sericulture is gaining ground in non-traditional areas too.
- Sericulture is best suited to a country like India, where manpower and land resources are in surplus and sericulture has potential to provide employment at home for entire family members by way of Chawki rearing, Cocoon production, silk reeling, hand spinning etc. and it is woman friendly, domestic chores can be attended conveniently combined with productive work.
- India enjoys the distinction of being the only country producing all the five known commercially exploited silks i.e. mulberry, tropical tasar, temperate tasar eri and muga.

The golden yellow muga silk is exclusive to India and the pride of the Nation. Vanya silks are the products of rich salubrious climate and nourishing vegetation. Therefore, Vanya sericulture offers protection to the forest wealth and providing livelihood for the tribals. Indian vanya silks enjoy a niche market the world over.

- At the moment silk production in India is 20,410 (2011) metric tonnes, but the actual consumption of the country is around 30,000 metric tonnes. Hence it is obvious that India's requirement of silk is much higher than its current production. Therefore, there is a lot of scope for the expansion of the industry. In addition to the domestic market there is huge export potential for Indian silks.
- Mulberry, the sole food plant of silkworm is a perennial and drought resistant which could be grown in varieties of soils both under irrigated and rained conditions, so where the other crops can't grow there the farmer can grow mulberry and earn livelihood by undertaking sericulture. When most of the agricultural crops do not revive even after a few showers mulberry being a perennial crop will sprout and yield leaves for silkworm rearing. Once mulberry garden is established it will give consistent yield for 15-20 years with minimum expenditure for maintenance.
- Sericulture highly suitable to small and marginal farmers, as sericulture involves simple technology and requires low investment. It is the only cash crop which provides frequent attractive returns with minimum investment and low gestation period. Sericulture farmer can have ten to twelve crops per annum.

Sericulture industry is an excellent avenue for providing employment with various entrepreneurial opportunities for the rural development, stability is the vital requirement for sericulture enterprise. With the onset of reforms to liberalize the Indian economy in July 1991, a new chapter has dawned for India and her billion plus population. This period of economic transition has had a tremendous impact on the overall economic

development of almost all major sectors of the economy; Sericulture Industry is one among them. Survival in the new global business market calls for improved productivity. Due to the market becoming worldwide, sericulture industry have to upgrade the quality of the products, use technology skillfully and utilize all the avenues provided by Government in order to face the increased competition. The challenge before India is to reorient the production strategies to suit the requirements of both national and international markets, by developing the good quality silk with low cost.

CHALLENGES AND STRATEGIES

It is obvious that Indian sericulture Industry is at cross roads, therefore there is an urgent need to bring in a holistic approach i.e. from leaf to fabric production and marketing and ancillary units of the industry to produce the best at lowest possible cost so that the country could benefit and rely less on the imported silk in view of the present global scenario.

- Production of silk in India has been rationally driven by domestic demand mainly for heavier handloom based fabrics like sarees. Silk in India produced from hardier and indigenous variety of multivoltine silkworms, the silk produced from these silkworm strains is not gradable. The changing consumer tastes in the domestic market from the traditional heavy handloom fabrics like sarees to lighter materials, are sending signal to the industry to reorient its production plans to match the changing demand patterns. Hence, the challenge before the Indian sericulture industry is to orient the production strategies to suit the requirement of both national and international market demand, by developing the bivoltine silk sector.
- Indian reeling sector is mainly cottage based and highly decentralized; employing a variety of reeling devices and producing low to medium quality of silk in limited quantities. The equipments used in the silk

industry are simple, conventional and less capital intensive. This leads to low value addition, heavy dependence on manual skill and attention and scale and scope economies being negligible. These features create a situation where the industry becomes highly competitive, very risky and inhabited by many small firms. Much needs to be done in the silk machines manufacturing sector. Unless adequate infrastructure and capabilities are built within the country, it will be difficult to be competitive. There are certain gaps and links that are amiss. Fragmented and very small units would not have the strength to upgrade or understand and react to the market forces. In this context systematic and organized restructuring of the silk industry to emphasize and enhance the production of high quality raw silk on commercial so as to facilitate export of Indian raw silk and lowering of imports is essential component in global perspective.

- The pre-requisites for a progressive silk industry would be the availability of raw silk of the right quality in adequate quantities at competitive prices consistently. The present day problem is that the raw silk lots are quite small and the cocoon prices are quite high (for the quality levels anywhere in the world) and as a consequence the demand for good quality raw silk in bulk quantity at a competitive price is not being met.
- The multi-end reeling technology designed and developed by Central Silk Technological Institute, Bangalore addressing the quality and productivity issues provides the advantages of pollution free working conditions, reduced health hazards and discourages child labour.
- There is a strong domestic market for silk in India which is expected to continue for a long period. However, the domestic production of raw silk is not sufficient to meet the rising domestic and export requirements.

Hence the country is dependent upon imports to fill the demand and supply gap, mostly from China. Import of raw silk and silk fibre to India negatively affected the domestic producers and forced the Indian government to impose anti-dumping duty. Self-sufficiency in domestic production of raw silk and suitable business protection for domestic producers of silk may be a solution. The past four years trends show that the demand supply gap marginally reduced probably due to improvement in domestic raw silk production and its quality.

- India has a number of distinct silk weaving clusters that are known for unique designs, weaves, colours, patterns, traditional knowledge (TK) and processes that are specific to a geographical region, and are guarded from centuries. Over the period, these products have become a brand by themselves, and recognized by their place of origin. Muga silks of Assam, Mysore silks of Mysore (Karnataka), Kanchipuram silks of Kanchi (Tamil Nadu), Brocades of Banaras (Uttar Pradesh), pochampalli saris, Gadwal silks (Andhra Pradesh) are just to cite a few. The globalization has brought about enormous challenges to the trade and industry. The GI Act stipulates protection of the market of the producers and safeguards the interests of the consumers of these unique products through registration and taking infringement action against the infringers. It is believed, that the IPR Protection of unique textiles products of the country with a predetermined market linkage strategy would help in brand building of the product, providing market linkages, generating more employment opportunities and enhanced income to the stakeholders. Hope all traditional silks will get the protection under the GI registry umbrella to avoid the exploitation especially in view of globalization.
- With the cheaper silk-like imitations, the consumers are easily being drawn away from silk. They are trying to derive a pseudo satisfaction of wearing a fabric with designs and colours hitherto available only on silk and the feel and

appearance with a resemblance of silk. It is time that we educate consumers about the virtues of silk that makes it worthy of possession and drive home the fact that only silk is silk. The emotional chord, luxury image, status and naturalness of silk are to be brought to focus and this can happen with a strategy for generic promotion of silk. In view of this SILK MARK was launched

- As a confidence building measure, the anti-dumping disputes should be dissolved through proper dialogues involving respective ministries and trade organisations from both the countries.

It is obvious that India is not able to withstand the competition in global market as Indian silk is the last, ungraded silk by international standard, while China's 2A grade of superior bivoltine silk is also available at the same price (or) even less. China also has 'C' grade silk which is its last grade and even this will be much more superior to Indian silk. Only India, which is the last bastion of silk handlooms in the world, can consume this C grade raw silk. No doubt dumping of silk yarn affects the silk industry in India. In the backdrop of increasing domestic consumer preferences, the gap between demand and supply, liberalized trade policies and our inability to produce quality raw silk warrants a thorough examination of the very structure of the sericulture industry. Therefore, there is an urgent need to bring in a holistic approach i.e. from leaf to fabric production and marketing and ancillary units of the industry to produce the best at lowest possible cost so that the country could benefit and rely less on the imported silk in view of the present global scenario.