STATE OF THE HANDLOOM INDUSTRY OF BANGLADESH

Chapter 1: Introduction

The objective of the present study has been to look into the existing status of the handloom industry of Bangladesh in reference to the past and formulate a hypothesis on the future standing. In order to understand the industry, such aspects as the trends in size of the industry, technology of handloom weaving, and organizational structure have been examined.

The study has been based on secondary materials drawn from desk review of available published and unpublished documents, and primary information gathered from field visits in the important handloom concentration areas, and also some selective areas producing artistically designed dedicate fabrics.

During the field work we visited many handloom units and observed their looms and accessories, and weaving and pre-weaving processes. We had focus group discussions with such stakeholders as weavers, traders and local elites to make out their perception and reality of the past, present and the future prospects of the handloom industry.

Chapter 2: Trends in Size of the Handloom Industry

The trends in size of the handloom industry are looked at by number of looms, number of employment, and volume of cloth output. Where such data are not available are looked at by number of establishments.

The available statistics on looms show a consistent growth of the industry during 1946–1990, and a decline after that. The number of looms increased from 134 thousand in 1946 to 437 thousand in 1990, and then declined to 362 thousand in 2003.

The employment also demonstrates a similar trend. It increased from 407 thousand in 1951 to 947 thousand in 1990, and fell to 798 thousand in 2003.

The estimated cloth outputs over the years are an evidence for a long term growth with some short-term fluctuations of the industry during 1955/56–1989/90, and a decline during 1989/90–2003/04. The output increased from 286 million meters in 1955/56 to 704 million meters in 1989/90, and fell to 520 million meters in 2003/04. The trend rate of growth during the period 1955/56–
1979/80 is estimated at 2.08 percent compound per annum, while the rate of growth of looms during 1951–1990 at 1.65 percent. The larger growth in outputs than the looms is primarily due to increased use of higher productivity looms and warp-winding equipment.

Neither the number of looms nor employment or output figures are available for the period after 2003. Nevertheless, the enumerated figure on establishment is available for the year 2013. This shows a long-term decline of the industry during the period 1990–2013. The number of establishments declined from 165 thousand in 1990 to 100 thousand in 2003 and further to 60 thousand in 2013.

The factors accountable for the long-term growth of the handloom industry during 1947–1990 may be summarized as follows: a favorable government policy towards protecting handlooms by adopting some fiscal measures against competition from mills and imports; voluntary cut of cloth output and expansion of surplus yarn production by the mills to provide handlooms with growing yarn supply, as mills could realize that handlooms would survive and have growth; consumers preferences for handlooms in the main lines of production such as cotton saris and lungis; production of certain specialized fabrics which the mills cannot produce; and above all, besides family labor, there are cheap supplies of outside labor, especially female and child workers who are employed in pre-weaving processes.

The long-term decline of the handloom industry during 190–2013 can be explained by the factors as follows: an outstanding growth of the small-scale powerloom industry, contributed largely by the availability of reconditioned Chinese powerlooms as well as of locally fabricated powerlooms; replacement of handlooms by powerlooms and conversion of Chittaranjan handlooms into powerlooms within the handloom establishments; change of women’s dress habit from handloom saris towards three-piece (salwar-kamij-dupatta) woven on powerlooms and finished in dyeing factories, grown over the years.

**Chapter 3: Technology of Handloom Weaving**

The technology of handloom weaving involves pre-weaving processes and the operation of weaving and cloth finishing. The pre-weaving processes entail sizing, winding, warp preparation and drawing in and reeding. The winding works are commonly done by female and child workers, who are part-time or full-time family or hired out-workers,
while the other processes are performed by adult male workers with the assistance of female or child workers.

There are four varieties of handloom: waist loom, throw-shuttle loom, fly-shuttle loom, and Chittaranjan loom. The waist loom is the most primitive one which survived in the Hill Tract Districts until about the turn of the present century. These looms are almost extinct. The next developments are gradually the fly-shuttle loom and the Chittaranjan loom. In weaving a common variety of fabric the physical productivity of a fly-shuttle loom is 160-170 percent higher than a throw-shuttle loom, and that of a Chittaranjan loom is 30-35 percent higher than a fly-shuttle loom.

In 1921 Bengal, 75 percent of the looms were of throw-shuttle variety and the rest 25 percent fly-shuttle variety. Over the years, the throw-shuttle looms were displaced by fly-shuttle looms. In the region of Bangladesh, Chittaranjan looms were quite unknown to the weavers prior to 1941. Nevertheless, gradual displacements of less productive looms by more productive ones took place over the years. But the lowest speed throw-shuttle loom not only survived to a certain extent but also increased during 1990–2003 (from 8,497 to 12,383), even when the industry experienced a decline in terms of the total number of looms (from 436.71 thousand to 361.70 thousand).

The survival and growth of the throw-shuttle loom is owing to its typical suitability of weaving artistically designed high valued Jamdani and Banarasi saris. These two products cater to urban aristocracy, and owing to increased urbanization and growth of income levels of the people, the demand for these products rose which contributed to growth of throw-shuttle looms.

The process of replacement of the fly-shuttle loom was not complete by 2003. This loom is suited for the production of Tangail silk saris and certain varieties of fabrics woven with coarse yarn. These include fabrics for the use of tribal people, motka fabrics, and the so-called khadi woven with mill-spun coarse yarn. So, after displacement, fly-shuttle looms will also live to a certain extent so long as the demand for these products will prevail, and the weavers will earn in harmony with the other types of looms including powerlooms.

The next stage of technical progress has been the adoption of powerloom technique, which means exit from the handloom industry and entry into the powerloom industry. Thus an unknown number of handloom enterprises with 10,500 powerlooms found their exit from the handloom industry and got entry into the powerloom industry during 1990–2003.
Yarn and product-mix are part of technology. Before liberation in 1971, handlooms mostly used cotton yarn. During 1955/56–1971/72, around 98 percent of the handloom fabrics were of cotton and the remaining 2 percent non-cotton, including silk and art-silk. Soon after liberation, changes in yarn composition in weaving began to take place. In 1972/73, the proportion of non-cotton increased to 3 percent and it went on gradual increase since then. In the year 1986/87, the estimated proportion of non-cotton handlooms rose to more than 8 percent.

Traditionally, Jamdani and Tangail saris used to be produced with high quality cotton yarn. But after liberation, the weavers in many cases, began to use art-silk yarn (in warp) with cotton (in weft) to weave such fabrics. These fabrics are popularly known as half-silk Jamdani sari and half-silk Tangail sari. Sometime in the late 1980’s, the government declared the Banarasi weaving area of Mirpur and that in Ishawrdi as the Banarasi Palli in order to protect the interest of the weavers as well as to develop the industry.

The Banarasi sari is constructed with high quality imported silk and zari. But over time, because of high price and short supply of pure silk yarn and high quality zari, the weavers started to substitute synthetic yarns like art-silk and polyester for pure silk and low quality zari for high class zari.

Shibganj in Chapai Nawabganj is a traditional area of producing saris and plain fabrics with locally produced silk yarn known as Rajshahi silk. However, local production of cocoon for silk reeling has drastically fallen over the years; but the weaving activity is still there with imported silk yarn.

Chapter 4: Organizational Structure of the Industry

Different weavers organize their productions under different systems such as: the home system, the handicraft system, the domestic or putting out system, and the factory or manufactory system, developed through historical process.

The home system was the primitive mode of production under which each family produced for its own needs and did not produce for the market. The system was prevalent among the Hill Tribes until about the turn of the present century. Because of the change of fashion and social transformation among the hill tribes contributed to the extinct of the system.

The handicraft system was the beginning phase of commodity production. Under this system, small weavers with a few looms and necessary equipment and employing mainly family labor produce for the market. Like many other professions, weaving was
at the start a caste based occupation. But with the expansion of trade, demand for cloth rose and many out-caste people took up weaving. This led to the formation of craft guilds on an inter-caste basis. The guilds became prominent in controlling the industry, particularly in the urban areas such as Dhaka and Murshidabad in the 17th and 18th centuries.

The third form of industrial organization was the domestic system, under which merchants called *mohajans* advanced money to weavers for working capital to facilitate production, which they would buy when ready for finishing and sell in the market. The ever-increasing markets, especially export markets in Europe and the Middle East, in the 17th century, made possible the weavers to increase their production. This brought the weavers into contract with the merchants or *mohajans*, first, for handling the products and second, for the increased working capital needs.

The next form of industrial organization was the factory or manufactory system locally known as *karkhana* system. It is a system in which workers are congregated in a workshop under the control of a private capitalist, and there is some division of labor in manufacturing processes.

In the beginning of the second quarter of the 20th century, a system called co-operative system developed in the handloom industry under government patronage. Several attempts were made in different times in different modes such as providing supply and marketing services in order to maximize profits of the weavers. But every time this system tried, proved unsuccessful, both during post partition and post liberation periods.

The latest organizational development in the industry is working under the social enterprise system. Two social enterprises—BRAC and Grameen Uddog (Grameen Samogri), have come forward in this line of business. Under this system, they advance money or died yarns of specific quality and count/denier and fabric designs to selected handloom enterprises and buy back the fabrics for sale through their sales outlets.

Now, for the commodity production, all three systems are working side by side and they cannot be properly differentiated because of overlapping nature. What we can do is to distinguish between a cottage unit or establishment (1-5 looms or less than 10 workers) and a factory unit or establishment (6+looms or 10+ workers). The cottage units always remaining dominant accounting for over 90 percent, the factory establishments increased during 1947–1990, and declined after that. This is possibly
due to exit of the very large units from the industry and entry into the powerloom industry.

Handloom producers mainly get the supply of raw materials such as yarn, dyes and chemicals from local traders. Small or cottage units generally buy died yarns. The factories or large units usually have their own dye houses. They often get the supply of yarn straight away from mill gates, and dyes and chemicals from importers.

Silk weavers of Mirpur, Ishawrdi, Tangail and Shibganj get the supply of dyed silk and art-silk yarns from local traders and/or importers who import from China. In the long past, the silk industry of Shibganj developed on local yarn production known as Rajshahi silk. Traditionally, the adjacent Bholahat has been well-known for the production of cocoon to be converted into yarn and fabric in Shibganj. But the production has drastically fallen in recent years. Moreover, even when there were sizable local productions, the industry used imported silk yarn for using in warp due to its superior quality.

The organization of marketing involves a chain of intermediaries. Several factors influence the entry of intermediaries into the operation of marketing. Such factors as the variety and quality of the products, the type and location of the consumers they cater to, the size and location of the units producing them, and the financial position of the weavers are among those which determine the nature and degree of middleman intervention.

In the areas of high concentration of handlooms, there are big markets termed as primary market. The weavers in respective regions come and sell their products in such primary markets to the wholesalers and/or retailers, locally known as beparis coming from the neighboring districts, and also to paikers who buy cloth to supply it to the central markets. There are two such central market: Baburhat in Narsingdi, and Gaochia in Narayanganj. These two market places are located in the central position of the country, and they are not very apart from each other.

The weavers who produce under the domestic or putting out system under private merchants or under the social enterprises do not have to market their products themselves—it is on the merchants or the social enterprises. There are three such known private trading houses who deal in lungis. They provide finance and/or died yarns to their fixed weavers, take back the cloth, process in their own and sell it in the market in their respective brand names, Fazar Ali Lungi, Amanat Shah Lungi, and Standard Lungi. The social enterprises working in putting out system are BRAC and Grameen Uddog
BRAC deals in assorted products of cotton and silk, and Grameen Uddog in cotton check shirting. They also sell the products in their respective brand names, Aarong and Grameen Check, respectively.

In the Banarasi Palli of Mirpur a wholesale/retail market has grown where not only Mirpur products but also Ishawrsdi Banarasi, Dhakai Jamdani, Tangail saris, silk saris of Shibganj, and many other varieties of handloom textiles of cotton and non-cotton are traded in the market. The producers of Mirpur and Ishawrdi sell their products directly to these shops.

It is quite relevant to mention here that a thriving forward linkage industry has grown within the Banarasi Palli of Mirpur. The forward linkage industry produces bridal and birth-day dresses with embroidery work on plain fabrics produced especially in Mirpur.

Chapter 5: Discussion and Conclusion

The present position of the handloom industry as well as of the small-scale powerloom industry is not known due to lack of data. Nevertheless, an idea can be made about the present state of the handloom industry by looking at the recent trends in the handloom units and employment. The rate of decline of the establishments and of employment during 1990–2003 is estimated at 3.8 percent and 1.31 percent respectively. The corresponding rate is estimated at 5.0 percent and 6.80 percent for the period 2003–2013.

Taking the above rates of declines, the number of surviving handloom establishments in 2017 would be in the order of more or less 45 thousand, while it was 100 thousand in 2003 and 165 thousand in 1990.

However, the handloom industry has taken its own course of transition to powerlooms. Nevertheless, this industry is expected to survive to the extent to which it is needed for the production of specialized textiles for which demand will prevail and the weavers will earn in harmony with powerlooms.

The decline of the handloom industry has to have serious implications for labor displacements and unemployment. But during our recent field visits we were reported that the labor already displaced were mostly absorbed in other sectors like the readymade garment industry and rural transportation (non-motorized such as rickshaw-van, and motorized like carrier motor cycles and scooters). The development of rural transportation network, especially after 1980’s raised the demand for transport
operation where increasingly larger number of persons found their employment. Many
displaced workers from handlooms found overseas employment as well.

The immediate need is to carry out a census enumerating both handlooms and
powerlooms to update the data base. The preceding two censuses listed both handlooms
and powerlooms. But listing of powerlooms was within the areas of handloom
production and/or within handloom units. The proposed census should include
powerlooms of the small-scale powerloom industry as well as those within handloom
establishments.