



## **EXPORT PERFORMANCE OF SILK INDUSTRY OF ASSAM**

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### **1. Introduction**

Sericulture is the part and parcel of rural Assam since time immemorial. In the independent era the state and the central government have taken various schemes to develop sericulture scenario of Assam. By understanding the employment creation capacity of sericulture, sericulture activities were initiated in poverty alleviation as well as employment generation schemes. The reports published by Census authorities of India “A Report on selected Handicrafts of Assam” (1961) has highlighted the importance of sericulture of Assam as it is next to weaving practiced during agricultural off season. Being an agro based economy, the poverty of masses can't be erased without giving due attention to the agriculture in India. Sericulture, on the other hand entails various quality for upliftment of rural society. “It is estimated that almost 72 lakhs persons are engaged in various sericulture activities in the country and sericulture can generate employment at the rate of 11 man days per kg of raw silk production (in on-farm and off-farm activities) throughout the year”. This potential is par-excellence and no other industry generates this kind of employment, especially in rural areas, hence, sericulture is used as a tool for rural reconstruction. Mulberry cultivation and rearing cocoons also provide high returns with a low gestation period. By adopting stipulated package of practices, a farmer can attain net income levels up to rupees thirty thousand per acre per annum. Sericulture can be practiced even with very low land holding. Acre of mulberry garden and silkworm rearing can

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support a family of three without hiring labor. So it is ideal for weaker sections of the society. It addresses the equity concern of the society too. Because of so many advantages, planners always have given focused importance in the sericulture sector.

In the post-independence era both eri and muga have occupied an important place as primary items of silk export. In the previous chapter we have shown that the country enjoys export potential in items produced from non mulberry. The paper examines the Government's initiative related to Assam's silk industry before looking into Assam's silk export under three heads of exporters, and Assam's share in India's silk export.

## **2. Methodology and Data Source**

The study is purely analytical and confined to export performance of silk sector. By its very nature, the topic, analyzing of export performance of silk of Assam needs comprehensive and schematic investigation based on collecting and collection of data duly blended with the storehouse of book knowledge. Thus our study would be based on data obtained from both primary and secondary sources.

## **3. Silk Industry of Assam – Government Initiative**

In the plan period, Central Silk Board (CSB), a statutory body constituted in 1948 for the development of sericulture and silk industry in the country has taken various schemes to increase the raw silk production of the country. To develop sericulture in the State, the Sericulture Research Station was established in the year 1953-54 in Jorhat. Rearing of tasar silkworm was also started in the year 1957 and a tasar seed cocoon rearing firm at Kokrajhar was started in 1959 by the Government to provide HYV seeds, the state government had set up 11 sericulture (mulberry) farms in different parts of the state. To increase muga production 3 basic Muga seed farms at Khanapara, Kokrajhar and Narayanpur were established during 1954-57. Eri seed grainages were also set up in different districts of Assam to boost sericulture.

With a view to provide research and development support to the industry, the CSB established the Regional Muga Research Station at Boko in 1981. The station has now three other extension offices located in Jorhat, Cooch Behar and Tura. The station has so far developed

improved technologies in the fields of muga host plants management, silkworm rearing and seed technology, pest management and host cocoon technology. In the year 1989, CSB in its National Sericulture Project, two districts of Assam namely Jorhat and Sivsagar were also included for the development of non-mulberry sericulture. In the Eight five year plan, CSB has taken “Other Development Program” (ODP) in the non-mulberry sector. It includes steps like setting up of Muga Silkworm Seed Production Centre in the state, implementing Augmentation of Muga food Plant Scheme, Product Development and Diversification Scheme etc. Some specialized organization is also set up in the region for the development of sericulture. Central MugaEri Research & Training Institute is a R&D institute in the field of muga and eri culture. It is under the control of Central Silk Board, Ministry of Textiles, Government of India. The institute has the responsibility of R&D activities to cater the needs of the on-farm and post-cocoon sector of muga and ericulture of NER. Project Golden Thread, an initiative of Ministry of Textile, Government of India is also carried out for the BPL category of Muga rearer in the Kamrup, Goalpara, Lakhimpur and Dhemaji district of Assam where traditional muga rearing is still in vogue. CSB has also been collaborating with both international and national agencies and universities involved in sericulture research etc., to harness their technical expertise in highly specialized fields and also pool resources for the development of new technologies in frontier areas of sericulture research. Because of these R& D work leaf productivity of muga food plant has increased from 10 to 11 kg per plant per year and cocoon productivity has increased from 40 to 60 cocoons per dfls. Out of various scheme Catalytic Development Program (CDP) is the flagship scheme of the Central Silk Board (CSB), Ministry of Textiles for sustaining all round development of sericulture and silk industry in the country, and has been an important tool for effective transfer and adoption of improved technology packages developed by the research institutes of CSB at the field level through five year plans. The CDP program has also been widely implemented in Assam. During XII Plan, the CDP has been redesigned to meet the sectoral requirements and to ensure that the sector grows at a healthy pace. In order to boost the textile sector in the NE region, the Government of India has approved a project-based strategy for the NER under an umbrella scheme by name “North East Region Textile Promotion Scheme”. This umbrella scheme will be implemented in the North East Region in addition to the regular schemes of the Ministry. The broad objective of the North East Textile Promotion

Scheme is to develop and modernize the textile sector in the North East Region by providing the required Government support in terms of raw material, seed banks, machinery, common facility centers, skill development, design and marketing support etc. The specific objectives of the scheme include increase in the volume of textile production, technology up gradation, improvement in design capability, diversification of product lines and value addition, better access to domestic and export markets, cauterization and improvement in labor productivity, market access and market promotion.

Apart from Central agencies, state government has also taken various initiatives to increase muga cocoon production in Assam. Various training program are imparted time to time to the seed grower, cocoon rearer and reeler to enhance muga production in the state. Involvements of NGO, SHGs are stressed in the process to strengthen cooperative movement in the root level of rural society under different program taken by the Sericulture Department of the state. Under social forestry and initiation of Sericulture Department of Assam, initiative was taken to plant muga silkworm host plant for more production of muga silk and upliftment of the local rearers. In Assam there are 67 VGRs with total area covering 1440 ha and plantation area covers 1069 ha of Som and Soalu plants. The VGRs are maintained by the Panchayats and allotted the land to rearers on rotation basis to do the muga silkworm rearing. State Government had also set up a training institute in Titabor, Jorhat for R & D of sericulture sector. Linking MGNREGA with Catalytic Development Program of CSB has also given impetus to the rearer to stick to their traditional occupation with a guaranteed minimum earning.

#### **4. Assam's Silk Export**

History depicts that Assam exported muga yarn of Rs.11,350 during the last year i.e. on 1809 of the rule of SwargadewKamaleswarSingha. During 18<sup>th</sup> and 19<sup>th</sup> centuries Assam's silk especially muga was the staple trade for East India Company as the same was very much in demand in Europe. Apart from that muga silk was also in great demand in the traditional handloom weaving cluster of India. Between 1886 to 1912, Assam exported almost 20,230 kgmuga reeled yarn annually. As per reports of Edward Gait, during 1890 year alone almost 50,275 kg of muga raw silk was exported from Assam and these were mostly consumed at the

weaving centers of Kolkata, Dacca, Madras, Hyderabad, Bhagalpur, Varanasi, Murshidabad etc. These silk were basically used for embroidery and ornamental works due to its natural shine and colour. Importers of Assam silk were from Bhutan, Tibet, and Great Britain in the British rule. “Towards the end of 18<sup>th</sup> century, there was regular trade in eri and muga cocoon in between Assam and the then Calcutta and through Calcutta to Europe which is supported by a report of about 25,000kg of eri cocoon export to Europe from Kassimbazar Silk Kuti during the period”. A share of eri silk of 96 sicca weight approximately cost around 1 rupee at that time. In that period traders from different areas of Assam went to Upper Assam to collect muga/eri cocoon, yarn, fabrics in exchange of commodities required by them. Later on these traders sold these products at high price in local hatt(Bazaar). Importers of Bhutan used to come to participate in these hatt which was held at the foothills of Assam annually. “ In the first decade of the 19<sup>th</sup> century 2000 pieces of eri cloth and eri yarn worth Rs.43, 000 were exported to Bhutan annually. It was also exported to Lhasa by the KampaBhutias. Export of eri cloth used to be done through the trade centre of HydeChowki at Assam border”.

In the post-independence era, country experienced a whole lot of change in export market. In the export scenario of textile sector cotton had occupied almost cent percent share and manmade fiber become staple raw material for the export orientated industries. Products other than handloom has gained stronghold in the textile export because of the patronage of big production houses and influx of huge investments in the sector. Assam is lagging behind in the industrial development and except tea and oil industry the growth of other industries in the region is not very impressive in the last six decades. In the post-independence era successive five year plans could not fully materialize the target market for industrial production. However, the region is rich in agriculture. So, since days horticulture items are largely occupying place in the export market. As eri and muga is traditional production of the state, in the post-independence era also both have occupied an important place as primary items of silk export. In the previous chapter we have shown the country’s export potential in items produced from non mulberry. Unfortunately though the state has the capability to cover the export share of silk business, this has not so far happened. First and foremost reason is that as the silk sector of Assam is not organized, procurement and adulteration of cocoons by traders are pervasive. Policy initiative in

the post liberalized period of India and respective demolition of Multi Fiber Agreement (MFA) has brought lots of opportunities to silk traders to showcase their products in the world market. However it is seen that silk producers in Sulakuchi and Bijohnagar area are quite ignorant about the changes taking place in the policy matter of silk as well as textile export sector.

Assam mainly exports eri and muga products to the world. Lack of organized information regarding contribution of Assam to India's silk export is a trembling fact. However, from the respective production share of eri and muga silk in the country's total, we can infer that both eri and muga silk could contribute in Assam's silk export. It is to be noted that after Pashmina, muga silk is most costly in natural fiber segment of India. Value addition to the muga silk could easily fetch high prices in the world market. Another important aspect of eri and muga is that though Assam is the store house of both the commodities, local consumption is much less than mulberry silk. It is quite clear from the information that there is an exportable surplus in eri and muga cocoon silk. So we can easily get into the export business. Major exports of Assamese silk are initially started by cooperatives like Assam Resham Samabai Pratisthan Ltd and The Assam Co-operative Silk House Ltd, two major co-operatives of Sualkuchi. Later on State Government has also come into the marketing of silk products through Apex Weavers and Artisans Co-operatives Federation Limited (ARTFED). ARTFED has been exporting eri and muga products since 1997 by taking part in fairs and exhibitions held abroad especially USA, UK, Germany and Turkey as well as in other parts of India. Assam Government Marketing Corporation who has outlets in different locations of the country are also sourcing traditional Assamese silk fabrics to the local exporter of respective areas, as the center has no any protocol to get into the export business. Another Government institution is North East Handloom and Handicraft Development Corporation under the Ministry of Textile, Government of India has also helped local entrepreneur indirectly to sell traditional silk items outside the country. "It has been noticed that infusion of young blood into the silk business has paved the way to participate in the trade fair and expos organized by the Central Government agencies like Silk Mark Organization of India, Handicraft and Handloom Export Corporation of India". Indian Silk Export Promotion Council and State textile agencies. Development of information technology especially internet has brought immense scope to the local exporters to get in touch with foreign buyers which was

earlier quite impossible for local people without intervention of experts. In fact showcase of local products through e-commerce portals has been quite easy now to cover the market in the competitive world. Entrepreneurship Development Programme(EDP) organized by different Government and NGO have also given impetus to local traders to get into silk export business. As per Silk Mark Organization, Guwahati at present there are 120 registered local outlets/ trading agent of Assamese silk comprising of entrepreneur and designer of the state, related with export business of the region. One to one discussion with some of them revealed that they are largely sending Assamese silk to Australia, USA, Japan and European market. It is seen that most of the order from foreign buyer of Assamese silk items are not bulk in nature and largely confined to high end user who loves to wear and use fashionable items. It has shown that immense scope of product diversification of Assamese silk. At present the main export items are plain clothes made up of mulberry silk, eri, muga (42-48inch width) with bed covers, pillow, curtains, tie scarves, stole, dress material etc. In the present study it is tried to ascertain information of Assam's silk export from different sources. In the Table -1 the details of exports of silk products of Assam has been summarized. There are three head of exports source namely:

1. Government agencies including ARTFED, BRAFED.
2. Co-operatives like Assam Resham Samabai Pratisthan Ltd, Kasturba Gramin Samabay Samiti Ltd, The Assam Co-operative Silk House Ltd.
3. Individual Exporter.

The information collected from various sources mentioned above shows that the amount of exports of silk products from the state is as follows-

**Table -1: Silk Export of Assam, 2000-2012**

(In Rs. Lakhs)

Year (1)	Government Agencies (1)	Co-peratives (2)	Individual Exporter (3)	Total Export(4)
2000-'01	21.34 (25.74)	61.57 (74.26)	N/A	82.91
2001-'02	34.09 (29.56)	81.23 (70.44)	N/A	115.32
2002-'03	25.97 (11.20)	191.97 (82.77)	14.00 (6.04)	231.94
2003-'04	30.63 (07.79)	278.56 (70.85)	84.00 (21.36)	393.19
2004-'05	29.77 (5.72)	302.79 (58.19)	187.77 (36.09)	520.33
2005-'06	37.02 (5.01)	345.76 (46.79)	356.23 (48.20)	739.01
2006-'07	39.75 (4.03)	421.33 (42.70)	525.71 (53.27)	986.79
2007-'08	45.74 (3.93)	375.34 (32.22)	743.87 (63.85)	1164.95
2008-'09	88.47 (6.29)	396.21 (28.19)	921.05 (65.52)	1405.73
2009-'10	104.41 (7.14)	403.11 (27.58)	954.11 (65.27)	1461.63
2010-'11	93.88	320.79	1065.3	1479.98



	(6.34)	(21.68)	1(71.98)	
2011-'12	112.34 (7.61)	279.32 (18.92)	1084.45 (73.45)	1476.11
2012-'13	122.36 (7.66)	354.14 (22.17)	1121.08 (70.17)	1597.58
CAGR(%)	14.38	14.41	48.95	25.56

Source: CSB Publication, Government and Co-operative Reports and Field Survey

Notes: 1. Government. Agencies include ARTFED, BRWFED, NHHDC, AGMC etc

2. Co-operatives include Assam Resham Samabai Pratisthan Ltd., Kasturba Gramin Samabay Samiti Ltd., The Assam Co-operative Silk House Ltd etc.

3. Individual Exporter list collected from Silk Mark Organization of India, Guwahati Chapter. Individual yarn exporters are from field survey and personal contact. List is not exhaustive.

4. Column (4) data are Author's calculation

5. N/A indicates Not Available.

6. Percentages are in bracket.

The table above shows that Cooperatives were the major contributors toward export (74.26 percent) in the early 2000s, followed by Government Agencies (25.74 percent). Individual exports did not exist. With the entry of individual exporters in 2002-03 the share of the Government Agencies came down to 11.20 per cent but that of cooperatives increased to 82.77 percent. Thereafter the share of both Cooperatives and Government Agencies started falling and individual exporters rising. The individual exporters ended up taking the major share (70.17 percent) in 2012-13 and Cooperatives pushed to the second position (22.17 percent). Government Agencies share fell to 7.66 percent.

In terms of value, the export of Government Agencies increased from Rs. 21.34 lakhs in 2000-01 to Rs.122.36 lakhs in 2012-13 and in the same period the export of the Cooperatives increased from Rs. 61.57 lakhs to Rs.354.14 lakhs, registering a compound annual growth rate of 14.38 percent and 14.41 per cent respectively. The individual exporters who came into the picture with a meager amount of export (Rs. 14 lakhs) in 2002-03 ended up with an export amounting to Rs.1121.08 lakhs in 2012-13. Compared to a growth rate of exports around 14 per cent both of the Cooperatives and Government Agencies, the individual exporters growth rate was 48.95 percent. These individual exporters exports basically comprise of apparel and garment produced from mulberry, muga and eri fabrics. They have been successful in creating marketing linkage outside the cluster and with the help from export promotion agencies they are able to send their consignment to destination countries.

In case of individual exporters, their ability to create diversified product like umbrella, tie, curtains and other readymade garments have given them a wide market. Most of individual exporter are sending diversified product to importers with high value addition. There is a high demand for plain muga cloth in Japan as their Kimonos are made of muga silk. Assam Resham Samabai Prtisthan Ltd. annually sends raw muga cloth to importers of Japan. In one seminar held in Guwahati in 2014 one Government official has said that he has seen one Kimono made of Assamese muga silk by Japanese was sold at 90 lakhs rupees in a trade fair held in Tokyo in November, 2013. Unfortunately, as we provide the raw material, only the main benefit is lured by someone else i.e who modify the product.

Further analysis of document received from the sources reveal that in cases of Government agencies exportable items are procured from local weaver in plain clothes and sent them to the importer without any value addition in the product diversification process. The same is the case for co-operatives too. Due to lack of expertise knowledge, these two categories of exporter are acting as feeder of raw materials to the importer of outside the state or country. The importers later on convert these plain clothes (raw materials) to apparel items which yield more value to them.

## 5. Assam's Share in India's Silk Export

When Assam's export growth is analyzed against the background of India's exports, it reveals a startling state of affairs. Table -2 brings out the trend in Assam's export and that of India's export. Assam's participation in international trade had been marginal. Assam's share in India's exports increased from 0.03 per cent in 2000-01 and further to 0.20 per cent in 2003-04. There was slight fall in 2004-05. However, due to tremendous increase in Assam's exports since 2005-06, the share of the state's exports in India's exports started rising from 0.23 per cent in 2005-06 to 0.69 per cent in 2012-13 and the increase in the share is continuous (Fig 1).

Assam's exports registered a continuous increase from Rs. 0.83 crores in 2000-01 to Rs. 15.89 crores in 2012-13. But India's silk export showed high fluctuation, ranging between Rs. 3338.35crores in 2006-07, and Rs. 1954.11crores in 2003-04. Assam's silk exports in value terms grew at a compound growth rate by 25.55 percent as against the compound growth rate of -0.38 percent in India's silk export during 2000-01 to 2012-13.

**Table-2: Contribution of Assam Silk to Country's Total silk export, 2000-2012**

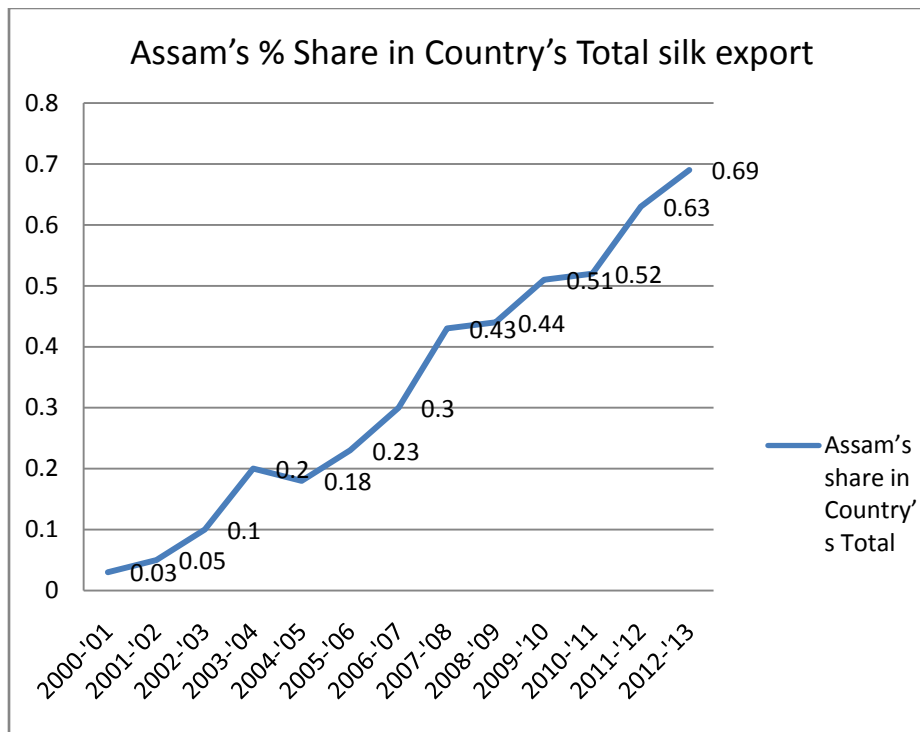
(In.Crores)

Year	India's Total Silk Export	Assam's Total Silk Export	Assam's Share in Country's Total (percentage)	Percent Increase /Decrease over Preceding Year
2000-01	2421.98	0.83	0.03	-
2001-02	2359.56	1.15	0.05	42.77
2002-03	2294.05	2.32	0.10	106.87
2003-04	1954.11	3.93	0.20	99.01
2004-05	2879.56	5.20	0.18	-10.20
2005-06	3194.2	7.39	0.23	28.04
2006-07	3338.35	9.87	0.30	27.76

2007-08	2727.86	11.65	0.43	44.47
2008-09	3178.19	14.06	0.44	3.57
2009-10	2892.44	14.62	0.51	14.25
2010-11	2863.76	14.80	0.52	2.27
2011-12	2353.33	14.76	0.63	21.37
2012-13	2303.53	15.98	0.69	10.57
CAGR(%)	-0.38	25.55		

Source: CSB publication

Figure 1



Source: Table -2

## 6. Existence of Informal Markets

The silk market basically has three stages- cocoon market, yarn market and finally the garment, apparel and diversified market. The value addition process in every stage plays an important role in all markets. “When rearers get cocoons, they either sell themselves or sell the cocoons to the middleman called ‘Dallal’ and some rearers sell cocoons directly to the buyers at weekly ‘hatt bazar’ by weight. Sometimes cocoons are sold to the government farms also”. In case of muga cocoon local mahajans and cocoon traders outside the region collect the cocoons at the fixed rate determined by their earlier contract. In the literature review it came out that though rearers grow cocoon in the remote, hilly areas by tackling various adverse situation of the production process they get nominal price of their hard labour, though they are the main source of starting the value chain. Das (2002) rightly observed that the activities of the middleman associated with cocoon marketing should be controlled somehow, as they exploit the innocent rearers depriving them in getting the a reasonable return on their investment. The traders or middleman made advances to the known rearers before commencing of the actual rearing and maintain a very close relation with them and easily take the chance of exploitation. But the story does not end here. Group discussion with different stake holder of cocoon market of Bijoynagar and Palashbari of Kamrup district and mugarearers of Sivasagar and Dhemaji district revealed that muga and eri cocoons are collected by the traders of Kolkata, Bhagalpur, etc and later on some of them are converted to yarn to be used by fabric producers of Odisha, Jharkhand, West Bengal etc. In fact, trade linkage from Nepal, Bhutan exports our local cocoon to as far as Tibet and China too. However when we verified the fact with the custom documents of the region, no article of cocoon or silk is listed with the custom houses of NER. In fact information regarding cocoon export and raw silk export does not verify the information provided by the stakeholders of the silk market of Kamrup, Dhemaji, Sivsagar districts. The owner of Fabric Plus, who is pioneering in Assam silk export has also conveyed the feeling that if the existence of black marketing of cocoon is not to be believed, then statistics regarding eri and muga production has to be declared wrong by the respective statistical publishing agency. Further study with specific objectives of cocoon marketing could solve the paradox.

## 6. Conclusion

To strengthen sericulture in the State, Central Silk Board and other agencies have taken various initiatives in the plan period. Assam's contribution towards India's silk export started with only 0.03 percent share in 2000-01 but it has increased to 0.69 percent share in the end of study period. Though the share percent is very low in country's total silk export its increasing trend is a sign of hope for Assam. Emergence of Individual exporter with expertise knowledge of product diversification has increased the role of this category of exporter in silk export of Assam.

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