

CHAPTER 11

SERICULTURE

11.1. India continues to be the Second largest producer of silk in the World. India has the unique distinction of being the only country producing all the five kinds of silk – Mulberry, Eri, Muga, Tropical Tasar and Temperate Tasar. Sericulture is an important labour-intensive and agro-based cottage industry, providing gainful occupation to around 7.25 million persons in rural and semi-urban areas in India. Of these, a sizeable number of workers belong to the economically weaker sections of society. There is substantial involvement of women in this Industry.

11.2. In India, Sericulture is mostly a village-based industry providing employment opportunities to a large section of the population. Although Sericulture is considered as a subsidiary occupation, technological innovation has made it possible to take it up on an intensive scale capable of generating adequate income. It is also capable of providing continuous income to farmers. India is the second largest producer of silk in the world with an annual silk production of more than 21,000 M. Tons in 2010-11(provisional). Although, all the known varieties of silk, viz. Mulberry, Eri, Muga and Tasar are produced in India, Mulberry silk is the most popular variety. Mulberry silk alone contributes more than 80% of the Country's silk production. Silk and silk goods are very good foreign exchange earners. Export potential of this sector is promising as silk production in Japan is declining and that of China, the largest silk producer the World, it is stagnant. The present global scenario clearly indicates the enormous opportunities for the Indian Silk Industry.

11.3. In India, because of the prevalence of favorable climatic conditions, mulberry is cultivated mainly in five states, viz., Karnataka, Andhra Pradesh, Tamil Nadu, West Bengal and Jammu & Kashmir. These five states collectively account for 97% of the total area under mulberry cultivation and 95% of raw silk production in the country. Now, as a result of growing realization, sericulture is gaining ground in non-traditional areas too.

Central Silk Board

11.4. For the development of silk industry in India, the Central Silk Board, a statutory body, is functioning under the administrative control of the Ministry of Textiles, Govt. of India with its Headquarters at Bengaluru.

11.5. The following are the important functions assigned to the Board.

- (a) Promoting the development of silk industry by such measures as it thinks fit.
- (b) Undertaking, assisting and encouraging scientific, technological and Economic Research.

- (c) Devising means for improved methods of mulberry cultivation, silkworm rearing, developing and distributing healthy silkworm seeds, improving methods of silk reeling, improving the quality and production of raw silk.
- (d) Improving the marketing of raw silk.
- (e) The collection and compilation of statistics relating to the sector.
- (f) Advising the Govt. of India on all matters relating to the development of silk industry including import and export of raw silk.

11.6. Raw silk is of two kinds, viz., mulberry and non-mulberry. The distinction arises from the rearing of silk worms either upon mulberry leaves or on other plants. Mulberry silk is produced mainly in Karnataka, West Bengal, Jammu & Kashmir, Tamil Nadu and Andhra Pradesh although some other States have made some progress in this direction under their development plans. Vanya (Non-mulberry) silk comprising Tasar, Eri and Muga are produced in Jharkhand, Chattisgarh, Madhya Pradesh, Orissa, Bihar, West Bengal, Assam, Meghalaya, Manipur and Nagaland. The different types of Vanya silk and spun silk and noil yarn are further defined as follows:

Tasar Silk – It is silk reeled from cocoons of silkworms belonging to saturniidae family, which are fed on leaves of Oak, Asan and Arjuna trees. Tasar silk is mainly produced in Jharkhand, Bihar, Chhattisgarh, Madhya Pradesh, Orissa and West Bengal & Andhra Pradesh.

Eri Silk – It is spun from cocoons of silkworms belonging to saturniidae family, which are fed on castor leaves. Eri yarn is produced in Assam, Bihar, Manipur, Meghalaya, Nagaland and West Bengal. Unlike other kind of silk, this cannot be reeled and hence it is only spun. It has natural copperish colour.

Muga Silk - It is silk produced only in Assam from cocoons of silk worms belonging to saturniidae family, which are fed on Som and Soalu leaves. It has a rich golden colour.

Spun Silk Yarn - Yarn composed of silk filaments of lengths ranging from 1 to 8 inches produced by bleaching, dressing and spinning the silk waste which is the by-product of the raw silk reeling industry.

Noil Yarn - It is short-staple residue obtained during dressing operations in silk spinning from silk waste. It is a by-product of spun silk industry. This can be spun into Noil yarn of coarse counts.

11.7. The information/data pertaining to silk sectors cover all the states of the country. Periodicity and source of Sericulture Data are given below:

Sl. No.	Particulars	Periodicity of Data	Source
1.	Production	Monthly/Quarterly/ Annual	Department of Sericulture (States) & Allied offices of respective silk producing state.
2.	Exports/Imports	Monthly/ Annual	DGCI&S, Kolkata
3.	Prices	Daily/Monthly/ Quarterly/ Annual	Cocoon Market/ Silk Exchanges & Allied offices of respective silk producing state.

11.8. The Highlights of this Sector are :

- ✚ Among the four varieties of silk produced during 2010-11, Mulberry accounts for 80.73% (16957MT), Eri 13.14% (2760 MT), Tasar 5.55% (1166 MT) and Muga 0.58% (122 MT) of the total raw silk production in the country.
- ✚ Among the two varieties of silk yarn produced during 2010-11, Spun silk yarn accounts for 66.5% (585 MT) and Noil yarn 33.5% (295 MT) of the total silk yarn production in the country.
- ✚ The silk goods exports from India comprise mainly items of Natural silk, Fabrics, Made-ups, Ready-made Garments, Silk Carpets and Silk waste. The category of silk fabrics viz., Dress materials, Sarees and Scarves & Stoles constitute the bulk of silk exports followed by Ready made garments with contribution around 60% and 30% respectively to the total silk export earnings of the country. The Indian Silk Goods have high export potential because of its distinctiveness and low production cost. India, being a traditional Sericultural country, holds a unique position in the world, since it has the distinction of cultivating all the four commercially known varieties of Vanya Silks viz., Tasar, Oak Tasar, Muga and Eri, in addition to the mulberry silk. Indian silk exports, which reach more than 190 countries, have increased over the years. The demand for Indian silk is not only in the domestic market but in global markets too. USA, UK, Italy and UAE, German & Spain are the top five importers of Indian silk products. Indian silk are steadily gaining greater demand in the new markets like Latin America and Russia also.
- ✚ Exports earnings which was ₹ 2,294.05 crores during the year 2002-03 has increased to ₹ 3338.35 crores during the year 2006-07, showing an increase of around 45.5 %. However, on account of the global financial crisis and sharp depreciation of rupee vis-à-vis the US dollar, there was decline in export of silk

goods to the top destinations viz., USA and EU, as a result, slump in silk goods exports from the country was witnessed during first three years of XI Plan i.e., 2007-08, 2008-09 and 2009-10 when compared to 2006-07 (terminal year of X Plan). The provisional export of silk and silk goods during April to February period of the year 2010-11, was ₹ 2516.12 crores indicated a decrease of 3.74 % compared to export of ₹ 2,614.09 crores in the same period of 2009-10.

11.9. This chapter contains the following tables:

Tables 11.1: Production of Raw Silk and Silk Yarn (2002-03 to 2010-11)

Table 11.2: Export of Silk Goods and Silk Waste (2002-03 to 2009-10).