

Present Scenario and Future Challenges in Handloom Industry in Bangladesh

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Abstract: Handloom industry in Bangladesh is having glorious past, questionable present and blurry future due to a lot of internal and external factors that are acting behind the scene [19]. Handloom sector in Bangladesh consists of more than 0.183 million handloom units with 0.505 million handlooms and about 1 million handloom weavers of which about 50% are female worker. This ancient and most important cottage industry of Bangladesh is now on the way of extinction because of various problems and barriers adjacent to this industry. This study found that in Bangladesh there are about 183512 handlooms weaving units with about 505556 looms. The total operational looms are 311851, which are 61.7 percent of total looms, and the rest 193705 looms are non-operational. We have found some reasons for shutting down of looms: lack of capital, lack of raw materials, inadequate technology, poor marketing system, inadequate government support etc. So, government should take necessary steps to overcome these challenges for the development of the handloom industry.

Keywords: Handloom, Challenges, Non-operational, Bangladesh

1. Introduction

Handloom industry is the biggest handicraft industry in our country; it is the second largest source of rural employment after agriculture [1]. The traditional handloom industry is the largest nonfarm economic activity in Bangladesh since the long past that has created enormous employment opportunities for the rural poor, and particularly for women [4], [16]. A manpower of about 1.5 million weavers, dyers, hand spinners, embroiderers and allied artisans have been using their creative skills into more than 0.30 million active looms to produce around 620 million meters of fabrics annually. It shares 63% of the total fabric production in the country designed for home consumption, meeting 40% of the local demand for fabrics. Besides, it provides employment opportunities to a million rural people, 50% of which are female. Another half a million people are indirectly engaged in the industry. It contributes more than 10 (ten) billion taka annually to the national exchequer as value addition [8]. While many countries have experienced the extinction of traditional industries with the advent of modern

production methods and technology [17], [20], the handloom industry in Bangladesh has not only been surviving, but recently also showing a positive growth trend in terms of total employment and output [4], [16]. According to available statistics, the handloom industry has been also successful in exporting high fashioned variety of women's ware known as Jamdani sharee to India [5]. Since the long past, the traditional handloom industry has been the largest industry in the rural area of Bangladesh, and the handloom products, such as muslin were well-known in Asia and Europe. Until the seventeenth century muslin, the finest quality of handloom cloth made of silk, was used as cloth for the emperors' family and nobles of the court, and it was a major export items in the early British period (1757-1947). For example, in 1787, Indian Rupee 5.0 million muslin was exported solely from Dhaka to Europe [7], [16]. Later, this family based industry faced a serious set-back due to a hostile policy favoring British mill-made cloth in greater India. Nonetheless, even in the entire Pakistan era (1947-1971), and after independence in 1971, the handloom industry preserved its dominance as the largest supplier of cloth in Bangladesh [18]. But now, handloom industry in Bangladesh

faces many challenges. Number of handlooms decrease day by day. Beside this, due to imbalanced competitiveness with cost-effective power loom, the number of non-operational loom increases. On the other hand, due to communal violence, increasing price of raw materials, absence of loan from government, insufficient transport facility, better facilities in India, lack of security many Bangladeshi weavers migrates to India [3]. So, the aim of the study is to try to identify the barriers in flourishing handloom industry in Bangladesh and give some recommendations for removing these barriers.

2. Literature Review

The art of weaving is perhaps as old as human civilization. Bangladesh can proudly claim to have many branches of this ancient art, of which the best known and most popular is the specialty Jamdani, which is one of the varieties of the famous Dhaka Muslin or Mul-mul [23]. Over the years, the weavers simplified the designs making them more stylized and geometric. Handloom products have shown decisive upward trend in the export market since 1972 and Bangladeshi handloom products with their distinctive design and superior quality have created a niche for themselves in overseas markets [2]. The Handloom industry is still a very important part of the textile industry of Bangladesh, is responsible for a very high percentage of the nation's economy. As Handloom industry is the biggest handicraft industry in our country, it is the second largest source of rural employment after agriculture. Though the employment opportunity in this sector has been squeezed in the last 15 years, this sector is still offering employment to nearly 10 million weavers in rural area [23]. Thus, a lot of researchers work for developing handloom industry.

Prof. (Dr.) Kuldeep Singh and Dr. Monica Bansal in their paper have discussed about the handloom export units in India. They say, handloom sector plays a very important role in India's economy. It is one of the largest economic activities providing direct employment to over 65 lakh persons engaged in weaving and allied activities. As a result of effective Government intervention through financial assistance and implementation of various developmental and welfare schemes, this sector has been able to withstand competition from the power loom and mill sectors. The writing of Nuimuddin Chowdhury [9], discusses the Bangladesh's handloom economy in transition. He cased of unequal growth structural adjustment and economic mobility amid laissez-faire markets. In his paper he showed that the character and consequence of the response forged by a predominantly rural industry, the handlooms, in Bangladesh, a country with massive poverty and considerable underdevelopment of public initiative, to the forces of economic liberalization and certain degree of investment reprioritization favoring rural development and infrastructure. Banarjee et al. [3], tried to identify the causes of weaver migration from Bangladesh to India. They identified the factors like fear of communal violence, increased price of raw materials, absence of loan from government, insufficient transport facility, better facilities in India, lack of security for their rapid migration to

India. Jaforulla [14] estimated the technical efficiency of handloom weaving industry in Bangladesh. He showed that technical efficiency of handloom industry of Bangladesh is only 41% and its technical efficiency might be improved by increasing its male and female labor ratio and decreasing its hired/family labor ratio and labor-capital ratio. Rahman [19] analyzed the prospects of handloom weaving industry in Pabna district of Bangladesh. The study identified all the internal and external factors that help to understand the present condition of the handloom industry operating in Pabna district. The study found that shortage of working capital, high cost of raw materials, lack of organizing capability, inadequate technology and efficiency, lack of policy support, huge knowledge gap, lack of power supply and shortage of credit facilities are the main features of the handloom units operating in Pabna district of Bangladesh. Khondoker, and Sonobe [18] discussed the development process of family-based traditional microenterprises in developing countries. They have found that entrepreneurs' general human capital acquired by formal education is critically important for the introduction of new and high value-added fashionable products, and, thus, performance of the enterprise. Islam et al. [11] analyzed the cost and benefit of handloom weaving units operating in Kumarkhali Upazila of Kushtia District. The cost-benefit analysis found that handloom weaving activity is profitable and profit per-loom for small scale and large scale units are higher than that of the medium scale units. Ghosh and Akter [10], in their research have identified those predominant factors that are moving the wheels of this industry slowly. They have found that shortage of working capital, high cost of raw material procurement, lack of organizing capability, inadequate technology and efficiency, and lack of policy support are major forces which are bitterly hit the handloom industry. Tanusree [22] studied the present situation of the traditional handloom weavers of Varanasi in Uttar Pradesh of India. The study found that after the industrialization, the handloom units operating in India has declined. The problems that are faced by handloom industry are invention of power-loom, capitalist control, drop off in wages, and increase in yarn price. Islam and Hossain [12] analyzed the technical inefficiency of handloom industry. They have found that education, experience, size of units, and age of owners are significant factors inflowing technical inefficiency of handloom industry. However, to the best of our knowledge none of the earlier studies analyzed the challenges in handloom industry in the case of Bangladesh. So, this study tries to identify the challenges and recommend some ideas that can help in flourishing handloom industry in Bangladesh.

3. Definition of Handloom

The Handlooms was enacted with a view to protect the livelihood of millions of handloom weavers and rich cultural heritage of Bangladesh Handloom Industry from encroachment of the power loom and Mill Sector. Handloom has been defined as follows:

- a) "Handloom" means any loom, other than power loom.
- b) "A hand operated machine for producing cloth by

weaving. In some instances, the shedding is performed by foot operation.” On the other hand, Hand loom is a machine or device which is made from wood and some portion of iron and used to produce woven fabric. Hand loom running without any electrical motor, its run by man’s hand and foot combination [15].

4. Present Scenario in Handloom Industry in Bangladesh

Handloom Industry is very important for Bangladesh. It is the second employment creative sector (after agriculture) in Bangladesh. It contains more than 0.18 million handloom units with 0.51 handlooms. According to Handloom Census, 2003, 0.88 million workers are employed in this sector.

4.1. Number of Looms in Different Years in Bangladesh

Data regarding units and looms in the industry have been found very little in quantity or amount.

Historically, there was hardly any organized attempted to assess the situation of the industry. The figures that could be traced from various sources are as follows:

Table 1. Number of Looms in Different Years.

Source	No. of looms
1941 Textile Commissioner of India	85478
1951 Population Census-1951	183251
1953 Director of Industries	250000
1956 Fact Finding Committee	380990
1974 Bangladesh Jaty Samabaya Shilpa Samiti Ltd.	428000
1978 Bangladesh Handloom Board (BHB)	437015
1987 Bangladesh Institute of development studies (BIDS)	425310
1990 Bangladesh Bureau of Statistic (BBS)	514456
2003 Bangladesh Bureau of Statistic (BBS)	505556

Source: Cited in Islam and Hossain [13]

Thus, it is clear from the above table that number of handlooms continuously increased from 85478 to 505556 during the period 1941 to 2003. The increasing rate was high in the decade 1941-51. After independence, number of handloom increases faster during late 1990s.

Table 3. Distribution of Operational Establishments and Looms.

Division	Total units	Total Looms	Operational	Percent	Non-Operational	Percent
Barisal	2311	4741	1589	35.5	3152	66.5
Chittagong	92095	156829	73988	47.2	82841	52.8
Dhaka	30558	105467	71015	67.3	34452	32.7
Khulna	23379	37855	26038	68.8	11817	31.2
Rajshahi	32968	195749	35668	69.3	60081	30.7
Sylhet	3201	4915	3553	72.3	1362	27.7
Bangladesh	183512	505556	311851	61.7	193705	38.3

Source: Handloom Census, 2003

It is observed from Table 3 that 61.7 percent looms were operational and 38.3 percent looms were non-operational in Bangladesh in 2003. The highest numbers

4.2. Handloom Concentrated Districts

Handloom industry did not develop equally in all regions of Bangladesh. This industry is concentrated historically in some regions with availability of inputs, marketing and transportation facilities. The following table describes the concentrated areas of handloom weaving industries in Bangladesh.

Table 2. Ranking of Districts by Handloom.

District	Establishments	Looms	Ranking
Sirajgang	14870	143858	1
Tangail	6476	37222	2
Pabna	7434	35119	3
Narsingdhi	7247	26693	4
Kushtia	11927	22348	5
Narayangan	5178	14743	6
Dhaka	5448	13604	7
Brahmanbaria	3944	10505	8
Bogra	3877	5446	9
Comilla	3090	4696	10
Total	69491(37.9)	314234(62.2)	

Source: Handloom Census, 2003

Note: The table excludes handloom establishments and looms in Chittagong and the figure in bracket of the last row shows the Percent of Bangladesh.

From Table 2, it is observed that excluding those of Chittagong, Sirajgang District has the highest number of establishments 14,870 in 2003 with corresponding looms 143858. By ranking in terms of number of looms from top to below in 2003, the other Districts are Tangail, Pabna, Narsingdi, Kushtia, Narayangan, Dhaka, Brahmanbaria, Bogra and Comilla with looms respectively 37,222, 35119, 26693, 22348, 14743, 13604, 10505, 5446 and 4696. A similar ordering of Districts in terms of looms per unit almost gives the same result. There are 37.9% of establishments and 62.2% of operational looms of total establishments and looms in above-mentioned Districts. It is clear from the above table that handloom industry is flourished in the middle zone of Bangladesh. Because, first three ranked district (according to number of looms) are located this region.

4.3. Distribution of Establishments and Looms by Currently Operational Status

The following table describes the distribution of operational and non-operational looms (division wise).

of operational looms 135668 about 69.3 percent were in Rajshahi Division. The second highest operational looms were 73988 in Chittagong Division. In Khulna, Barisal,

and Sylhet the operational looms were 26038, 1589, 3553. But in Sylhet division has highest percentage rate and Barisal has the lowest percentage rate. However, there are 71015 operational looms about 67.3 percent in Dhaka Division.

4.4. Reasons for Non-operational Looms by Division

There are many reasons behind non-operation of handlooms in Bangladesh. Among all problems lack of capital, lack of yarn, sale problem and labor problem are the main problems. The reasons for non-operation of looms are shown in Table 4.

Table 4. Reasons for Non-operational Looms by Division.

	Lack of capital		Lack of yarn		Sale problem		Labor problem		Others	
	2003	%	2003	%	2003	%	2003	%	2003	%
Barisal	1502	84.3	222	12.3	62	3.4	16	0.9	-	-
Chittagong	37436	58.8	4342	9.9	1354	3.1	331	0.8	175	0.4
Dhaka	11925	76.7	2304	14.8	914	5.9	238	1.5	176	1.1
Khulna	7859	67.4	2258	19.4	1004	8.6	465	4.0	75	0.6
Rajshahi	16016	74.9	2186	10.2	1407	6.6	762	3.6	1008	4.7
Sylhet	773	57.5	254	18.9	190	14.1	53	3.9	75	5.6
Bangladesh	75511	79.2	11566	12.1	4931	5.2	1865	1.9	1509	1.6

Source: Handloom Census, 2003

From Table 4, it is found that most of handlooms shutting down their factories due to lack of capital. By Division most establishments about 85.8 % in Chittagong Division and the least establishments 57.5 % in Sylhet Division report lack of capital cause fall the loom idle. In Dhaka and Rajshahi Division, about 76.7% and 74.9% reporting establishments report lack of capital is the reason for their idle looms. About 19.4% establishments in Khulna Division report lack of yarn as its problem. Only a few establishments between 3.1% and 14.1% report marketing problem. Another few

establishments ranking from 0.9%-3.9% report labor problem is a reason for non-operation of looms.

4.5. Size of Employment by Sex

A large number of labor forces are engaged in handloom industry in Bangladesh. Next to agriculture, it is the second largest source of rural employment. The distribution of employment in handloom industry by male and female are shown in Table 5.

Table 5. Size of Employment by Sex.

Items	Years and percentage							
	1986	%	1987	%	1990	%	2003	%
Sex								
Male	648865	73	443135	55	571765	56	472367	53
Female	244160	27	362565	45	455642	44	415748	47
Total	893034	100	805700	100	1027407	100	888115	100

Source: Handloom Census, 2003

From the above table, it is seen that movement of labor force in the Handloom industry is not smooth, rather fluctuation depending on the number of units, looms etc. There were 0.89 million labor force in 1986 and this decreased to 0.81 million in 1987. In 1990 the number is the highest 1.03 million, but it decreased to 0.88 million in 2003. Female labor force has general tendency to increase and male labor force has a tendency to decrease. In 1986 female labor force were only 27% but in 2003 it increases to 47%.

Table 6. Handloom Markets.

Sl.	Trading Products	Name of the Market
1	Jamdani	DemraBazar, Demra, Dhaka
2	Jamdani	Jamdani Shilpa Nagari, Noapara, rupgonj, Narayangonj.,
3	All-Handloom Products	GausiaMarket, Bhulta, Narayangonj.
4	Handloom Products	Baburhat Shekerchar, Narsingdi.
5	Tangail Sharee	Karotia Bazar, Korotia, Tangail
6	Tangail Sharee	Bajitpur Hat, Adi-Tangail, Tangail.
7	All Handloom Products	Shahjadpur Bazar, Shahjadpur, Serajgonj.
8	All Handloom Products	Shohagpur Hat, Belkuchi, Serajgonj.
9	All Handloom Products	Enayetpur Hat, Enayetpur, Sirajgonj.
10	All Handloom Products	Ataikula Hat, ataikula, Pabna

Source: Cited in Rahman (2013).

4.6. Handloom Markets

From the above table we have seen that most of the markets are developed based on product category. Markets for Jamdani are located in Narayanganj zone where markets for Tangail Sharee are located in Tangail district.

5. Challenges in Handloom Industry in Bangladesh

Handloom Industry is very important for economic development of Bangladesh especially in rural areas. Because many villagers are employed in this sector and earn their brads. But the growth in this sector is not smooth and it faces various challenges:

Weavers are suffering from inadequate contemporary technology and scarcity of working capital, which are mandatory to maintain the smooth flow of production [2]. But, weavers suffer from scarcity of working capital. Most of the time, weavers acquire their working capital from their own money and sometimes they acquire capital from various in situations like govt. banks, private banks and some other financial institutions. According to Handloom Census, 2003, more than 79% handloom units shut down their business due to lack of capital.

Weavers in our country don't get quality raw materials at right time and at right price. The issue of easy sourcing of raw materials (both yarn and dyes & chemicals) at reasonable prices has been a key problem across centers of handloom production. The problem is far more acute for individual weavers. Cotton and silk yarn is the major input for handloom weaving. In recent years, there has been a phenomenal rise in the prices of yarn. The main reason for this is the sharp increase in the prices of cotton. Supplementary reasons include lack of proper delivery systems, closure of spinning mills in some handloom producing zone, and non- fulfillment of the Hank Yarn obligation by the organized mill sector. According to Handloom Census, 2003 more than 12% handloom units shut down their production due to Lack of yarn.

In addition, the handloom unit owners cannot achieve maximum possible output due to failure of choosing the optimal combination of inputs as they do not have higher education, skill, experience, training and well management capacity. For these reasons, the owners fail to minimize input use to produce a certain level of output. This failure makes their units less profitable and hence, they are forced to close down their units over time.

Poor marketing and insufficient market linkage outside the state ails the industry from growing and earning more revenue. Most the handloom product markets are located in special region. For example, Markets for Jamdani are located in Narayanganj zone where markets for Tangail Sharee are located in Tangail district. On the other hand, most of the buyers are not concern about the quality and the price of different products.

Many customers want to buy a sari in a reasonable price not in high price. When a customer gets a power loom sari within a budget, then they do not go to buy handloom products. Because, handloom products are costly than power loom products. The power loom can imitate design of handloom product and produce it in low rates. And the shop owners sell the power looms cloths as handlooms to the customer. The buyer could not identified what is power loom product or what is handloom one. It is fact that the high cost handloom product could not struggle with power loom product.

Our handloom product quality is very low. At the same time we produce some identified product. So, we cannot expand our product market both within and outside the country.

Lack of information to weavers regarding various Government policies and schemes under implementation, is a significant cause for the dwindling fortunes of the weaver community. Sometimes, the implementing agencies and the concerned Governments Departments may not possess complete information, resulting in critical gaps in implementation.

Infrastructure in the handloom sector continues to be inadequate. Facilities such as clean drinking water, sanitation, effluent treatment plants and electricity, are not available in all hubs of handlooms production. Systems that ensure efficient supply chain management from the stage of availability of handloom raw materials up to sale of finished goods, essential for providing the weavers easy access to inputs and markets throughout the country. This is compounded by the sparse nature of population and settlements, limited local organization, poor implementation of public schemes and lack of adequate public accountability as well as lack of institutionalized evaluation and monitoring mechanisms.

Inadequacy of a dedicated data base for the sector continues to be a major drawback, which adversely affects policy formulation and review. Its absence also hinders attempts at inter-sectorial comparisons with related departments. For example, the Government uses aggregate data to compare the production figures of handloom industry with those of mills and power-looms. But aggregate data does not reflect the rich diversity of handlooms – in terms of differences in production patterns and types of products amongst regions and districts.

Due to the lower income and instable work the younger generation of weavers has been migrating to other occupations. This has reduced the weaver community.

Due to the vulnerable financial condition, the weavers, individually, are not able to set research and development facility and spend money on it. The state provisions are also not sufficient. Modern designs are not developed in sufficient number and in tune with the changing taste of the public.

Despite the welfare-oriented policies implemented by the Government, almost half of the handloom weavers belong to the most backward and poorer sections of the population. The high

incidence of poverty and illiteracy among weaver families is accompanied by poor access to basic necessities including health, water, sanitation, housing and livelihood facilities.

The role of women in the handloom industry is largely unacknowledged. But this sector derives a majority of its skills and work from women who constitute about 50% of weavers and workers engaged in this sector. Although in some regions, women may not specifically take up weaving work, they are engaged in the production process right from the initial stage of opening up the hank to the finishing of the product.

Government supports to this industry are not sufficient and effective. Most of the times, government policies facilitate mills and power-looms instead of handlooms. So, handloom industry becomes less competitive than power loom industry.

6. Recommendations

All the researches on handloom sectors have sought different strategies for the support of handlooms and its weavers. But the actual situation has not been changed as expected. In addition, day to day the heritage based crafts industry is destroying. Thus, it is utmost important to create proper initiative, which boosts power to handloom industry; symbol of our heritage and culture; to survive with its own potential without any fare of rivals- power loom and industrial looms. So, after analyzing the above situation the study recommend the following steps, which we believe, we will provide a direction for further improvement of this sector and prevent the shutdown process:

Poor marketing and insufficient market linkage outside the state ails the industry from growing and earning more revenue. Apart from other, innovations in design to cope up with the latest market demand are not sufficient and have posed a threat to this indigenous industry. In this case, our recommendation is that government should have a monitoring cell under Handloom Board of Bangladesh to monitor activities of those wholesalers and retailers who are engaged in selling raw materials for handloom products to prevent any unfair advantage. In addition, all tax and levies should be waived on all kinds of raw materials which will ensure the right price.

Weavers suffer from inadequate contemporary technology. So, government should take necessary steps to make available these technologies in local market and should waive all taxes on these technologies so that weavers can afford these technologies.

Weavers suffer from scarcity of working capital. Most of the time, weavers acquire their working capital from their own money and sometimes they acquire capital from various in situations like govt. banks, private banks and some other financial institutions in higher interest and various difficult conditions. Both government and private sectors should work to solve this problem of working capital. Government & Private bank must be insured the credit facilities to the producers at lower rate of interest. Govt. should offer short term loan before the weaving season so the weavers will not

facing any financial problem for handloom weaving.

High level of skill is needed to produce handloom products, but weavers are unskilled or semi-skilled. At the same time there is no development program for weavers. So various specialized trainings program should be launched for weavers that will keep them updated. Both private and public sectors can work for this.

The Handloom Reservation List includes only those items woven with cotton and/or silk yarn, it was strongly recommended that the Reserved List be broadened to also include items woven with blended yarns, such as viscose and other blended fibers as this is now the requirement of the customers. Unless this oversight is corrected weavers will continue to lose market share with subsequent loss of income for the entire weaving chain.

The study have found that handloom industry faces intense competition from mill and power loom sector. So, government can create a quota system for handloom industry, under which, some special products such as Sharee, Lungi, Three Piece, Bed sheet etc. which have high demand in national and international markets, can exclusively be produced by handloom.

The export potential of handloom industry needs to be exploited more to increase the flow of foreign exchange to the government. To achieve this purpose, Mega Handloom Expos should be organized be during the festive season in different countries.

At present a small number of weavers are covered by the handloom co-operative societies. It is therefore, suggested to bring the remaining large chunk of weavers under the co-operative fold and increase their bargaining power. Alternatively, the weavers should be encouraged to form self-help groups. Further the co-operatives should be run on professional management basis.

Government supports to this industry are not sufficient and effective. Government should be more responsible and should provide more policy support to save this ancient industry. Our neighboring country, India, provides approximately 20% incentives to their handloom industry and these create problems like lots of handloom products enter in our market through illegal ways as these products are cheaper than our local products. To eliminate this problem, government can provide incentives to those weavers who produce those handloom products which have high demand in national and international market, such as Sharee, Lungi, Three Piece, Bed sheet etc. and government should take necessary steps to control the price of yarn at desired level. So that weavers can produce the product at cheap rate. Supplied of electricity should be maximized and price of per unit electricity must be charged in the favor of owner of the handloom industry.

Women played a vital role in handloom industry. But their works are not recognized. So, women workers should be recognized as contributors and enumerated in any mapping and diagnostic exercises.

Finally government should establish a favorable policy to flourish handloom industry.

7. Conclusion

Handloom industry generates remarkable benefits for Bangladesh economy in terms of micro- and macroeconomic impacts. It plays vital role to reduce poverty, increase employment, and enhance household income and consumption in the country. Thus, in Bangladesh, handloom sector has positive contribution to employment generation and economic growth. But this sector faces various challenges which the reasons for non-operation of looms. Therefore, the government and the non-government agencies should come forward with financial, technical and policy supports for development of handloom industry in Bangladesh.

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