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MINISTRY OF COMMERCE AND INDUSTRY
ALL INDIA HANDICRAFTS BOARD

R E P O R T
ON
**THE JARI INDUSTRY AT IMPORTANT
CENTRES**

PLANNING AND RESEARCH SECTION
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In continuation of the Mujumdar Committee's report on the Jari Industry in 1957, a fact finding survey was undertaken at important centres of the industry to supplement it with factual data on various aspects of the competition between the hand and power sectors. This report is the outcome of the same. The study at Surat (chapter III) was undertaken by the office of the Northern Region while the rest were covered by the P. & R. Section with the assistance of the regional officers.

CHAPTER I

INTRODUCTION

1.1. At its 22nd meeting held on 31st March 1959, the Standing Committee of the Board considered the report of the Jari Enquiry Committee. It was felt that the Enquiry Committee Report did not contain enough data on employment and production in the hand-loom and the power-loom sectors of the Jari Industry, so as to provide the essential basis for determining the nature and extent of competition. In the absence of this, it was felt that the Board was in no position to accept the recommendations of the Enquiry Committee relating to competition. The Standing Committee, therefore, desired that detailed and rapid investigations be undertaken for collection of the relevant statistics.

1.2. Besides, it was decided that statistics be collected on various aspects of the industry upto and including the wire drawing stage. It was said that introduction of mechanical processes has to be preceded by a study of the present number of employed and an estimate of the displacement of labour which it may cause and how they will be employed. Further, certain other important centres of Zardozi were also to be covered. In effect, factual information on various aspects of the structure and organization of the jari industry in its various sectors was required to be collected, collated and analysed. Hence the State Governments were accordingly requested to be furnish relevant information regarding the location of the industry and a quick survey of the important centres was launched on the basis of a small proforma.

1.3. This report is the outcome of the rapid investigations undertaken at different centres one by one. The following two chapters present data on the structure and organisation respectively of the industry at Varanasi (collected towards the end of 1959) and at Surat (collected towards May-June 1959). These two centres were studied intensively. The fourth chapter summarises the salient features of the industry at 14 other centres reported to be important enough for this industry, viz., Jaipur, Agra, Hyderabad, Ajmer, Bombay, Delhi, Paithan, Lucknow, Patna, Barielly, Bhopal, Tiruchy, Madras and Bangalore. These centres were surveyed on different occasions during the year 1959-60. Moreover, it may be mentioned that the approach adopted at the Surat Survey was slightly different from that adopted at other centres. The last chapter discusses broad inferences based on the statistics presented earlier. The brief description of the various processes undertaken at different stages of the industry is given below, as it may be conducive to a better understanding of the presentation of data in the following chapters.

1.4. The first stage in the manufacture of Jari thread is 'Potai' or 'Pavtha', which means bar making and wire drawing. The process involved melting of silver ingot, turning it in to bars weighing on an average 75 to 80 tolas each, known as 'Pasa'. The bars are then drawn to a length of about a yard by gently beating after treatment. After that the material is drawn through steel plates with small holes, so as to give silver wire of about 60 yards length per tola of weight. The next process called "Tarkashi" or "Tania" involves transformation of the wire to thinner and final stages with the use of diamond or ruby dies. The third and the last stage of wire drawing is called 'Badla', wherein the fine silver wire is flattened by power driven machines and then wound on silk or cotton thread. When twisted together, this thread is known as 'Kasab' or 'Kalabattu'.

1.5. Such silver wire, sometimes gold-plated, is used in weaving of borders and lacer on the one hand and embroidery on various clothes like sarees on the other, sometime in the form of stars, spangles, or flowers. Borders or laces are woven on the handlooms as will

as powerlooms. Often enough the looms meant for borders and laces weaving are of a special type being smaller than the usual handlooms. Nevertheless in some places, the bigger looms normally used for weaving, in textiles, are also used for weaving borders in the form of 'Thans' of various sizes and the 'Thans' are later on cut into smaller widths, so as to give four or six borders at a time for one loom. Various floral and other designs are woven into the borders and sometimes the Jari thread is substituted by silk or artificial silk yarn in the warp, so as to make the product cheaper. Sometimes the borders are not woven separately but are inter-woven in the body of the saree itself, as in the case of brocades; Zardozi connotes embroidery with the Jari thread in the body of a Saree of other textile piece, and the intensity of work varies from very ornate garments to very simple ones with a little of embroidery on the borders of 'Pallows'. Embroidery is also done sometime not with the simple Jari thread but with stars, spangles, etc. made of the Jari thread earlier for this purpose.

1.6. By and large, considerable difficulty was experienced in eliciting data relating to production of various sectors on two accounts; *viz.* (a) only a few establishments worked on their own account and could furnish some rough estimate of the value of their out-turn; others processed the raw materials given to them by the dealers at set servicing charges and had no responsibility of marketing the same and thus could only furnish the quantity of jari handled and their service charges. (b) The products particularly of the zardozi sector varied in contents and specifications. Obviously these were less amenable to uniform measurement than would otherwise be possible. Efforts made to get some idea of the trends in production during the last four years or so proved infructuous as the artisans could hardly recall the value or volume of their activities within permissible margins of estimation. Likewise, the manufacturing establishments themselves were not in a position to shed light on the margins retained by the intermediaries as most of them had little to do with the marketing of their output beyond handing over the same to the dealer-financier. In such circumstances, perhaps, it is advisable to have a separate enquiry amongst the traders for this purpose which was not possible during the present study.

CHAPTER II

VARANASI

2.1. The Jari Industry at Varanasi is traditional in character. This industry has been developed as an adjunct to Banarsi Fabrics that have been famous throughout the world for a long time. The bulk of jari thread produced is used in brocade weaving which is an important source of livelihood for quite a large number of people at Varanasi. According to the survey, the Jari Industry at Banaras gave employment to 2940 persons in the year 1958 producing Rs. 43.07 lakhs worth of jari thread, Rs. 3.66 lakhs worth of orders and Rs. 2.15 lakhs worth of embroidery.

WIRE DRAWING

2.2. On the whole, the wire drawing sector at Varanasi was organised in a horizontal way, but for twelve establishments which combined the second and the third stages. There were twenty establishments that undertook 'potaii' i.e. the first stage operations without power; on the other hand, only two establishments used power. All these were proprietary concerns but they did not undertake the manufacturing activity on their own; instead they worked on a contract basis which resulted in some sort of domination by the dealers who usually gave the contracts. However, it may be mentioned that one of the two power operated establishments was also reported to have manufactured wire on its own in addition to its work on contract. At the second stage, i.e., Tarkashi, there were 51 proprietary establishments of which as many as 47 used power; besides there were 5 power operated establishments run on a partnership basis. All the 4 establishments that worked manually got contracts from outsiders, whereas amongst the power-operated establishments only 9 worked with their own materials. At the third stage there were as many as 186 establishments, of which only 8 were on partnership basis. Over 95% of the establishments worked on their own while the rest get contracts from outsiders.

TABLE NO. 2.1

Number of establishments by sector and by mode of business

Sector	Manually operated				Power operated				G. Total	
	Own account	On contract	On wages	TOTAL	Own account	On contract	Own account & contract	TOTAL		
1	2	3	4	5	6	7	8	9	10	11
1st stage (Potaii)	..	20	..	20	..	1	1	..	2	22
2nd stage (Tarkashi)	..	4	..	4	9	41	2	..	52	56
3rd stage (Kalabattu making)	177	9	..	..	186	186
2nd stage and 3rd stage (Tarkashi and Kalabattu making)	12	..	..	..	12	22
All Sectors	..	24	..	24	198	51	3	..	252	276

2.3. Thus it would appear that while in the first two stages work on contract played a dominant role, it is the reverse at the third stage; besides these, 10 establishments were found to engage in both the second and the third stages of manufacturing on a proprietary

basis while 2 others did that on a partnership basis; all these 12 units operated with the help of power. In all, there were only 24 units in the wire drawing sector that were operated by hand as against 252 units using power.

TABLE NO. 2.2

Distribution of establishments according to the number of days worked

Sector	No. of days						Total	
	60 days & below	61-120	121-180	181-240	241-300	301 & above		
Potaili (1st stage)	Manual	..	11	5	3	1	..	20
	Power	..	..	..	..	2	..	2
Tarkashi (2nd stage)	Manual	..	4	..	..	..	..	4
	Power	..	3	6	33	10	..	52
Kalabattu making (3rd stage)	Manual	..	..	..	..	..	..	..
	Power	1	10	44	88	42	1	186
2nd & 3rd stage	Power	..	..	1	4	7	..	12
All Sectors	Manual	..	15	5	3	1	..	24
	Power	1	13	51	125	61	1	222
TOTAL		1	28	56	128	62	1	276

2.4. Table No. 2.2 gives an idea of the under-employment at various stages in this sector. It is clear from the figures that, by and large, establishments operating by hand worked for comparatively less number of days, while the power operated units had more work. Sixteen establishments working at the first stage 'potaili' got less than 6 months work; only three establishments at this stage were able to secure work for more than 8 months. At the second stage, i.e. Tarkashi, none of the four manually operated establishments was reported to be working for more than four months in a year. Of the 52 establishments working on Tarkashi with the use of power, 17 worked for less than six months. Thirty-three establishments had work for more than 180 days in a year but none of these worked for more than 240 days in a year. At the third stage, however, there appears to be comparatively good spread of the establishments working for different lengths of time in a year. While the detailed figures are given in the table above, it may incidentally be observed that 10 establishments had apparently no work for at least 8 months in a year, whereas 42 other establishments were reported to be busy for more than 8 months in a year. On an average the establishments in the first stage worked for 152 days in a year, those in the second stage worked for 204 days in a year while those in the third stage had worked for 229 days in a year.

2.5. In all there were 603 family workers working in the wire drawing sector as against 639 working on wages. Of these 7 hired personnel and 77 family workers acted in a supervisory capacity. Of the rest, 161 were women and 39 children below the age of 14. In particular it may be noted that the 'potaili' work, i.e. the first stage is so arduous that no women or children would be employed therein. On the other hand, the third stage work attracted most of the women and the children. In all 111 persons worked in the hand operated sector and 1131 persons worked in the power drawn sector. It may be noted that a majority of women and children artisans worked as family labour getting no explicit wages. It is the third stage of wire drawing that gave employment to about 60% of the total number of workers engaged in this sector.

TABLE No. 2.3

Sectorwise employment according to sex

Sector		Supervisory		Others			Hired Family		Total			
		Hired	Family	Malcs	Females	Children	Hired	Family				
				Hired	Family	Hired				Family		
1	2	3	4	5	6	7	8	9	10	11	12	
1st stage (Potaii)	Hand	..	2	41	40	..	..	..	..	41	42	83
	Power	..	1	11	1	..	..	..	..	11	2	13
	Total	..	3	52	41	..	..	..	..	52	44	96
2nd stage (Tarkashi)	Hand	..	3	9	7	8	1	..	..	17	11	28
	Power	5	34	166	39	..	1	2	2	173	76	249
	Total	5	37	176	46	8	2	2	2	190	87	277
3rd stage (Kalabattu)	Power	1	28	287	253	6	135	8	26	302	442	744
2nd & 3rd Stages (Tarkashi & Kalabattu)	Power	1	9	93	11	..	10	1	..	95	30	125
TOTAL	Hand	..	5	50	47	8	1	..	..	58	53	111
	Power	7	72	557	304	6	146	11	28	581	550	1131
GRAND TOTAL		7	77	607	351	14	147	11	28	639	603	1242

2.6. The mode of payment for hired labour was piece rate in the first two stages whereas in the third stage time rate was very predominant. This may be due to the fact that in the first two stages of work it is the bulk of metal handled in the particular way that matters, not withstanding time taken; on the other hand, in the third stage, what is required is attention to the machine which goes on twisting the silver thread on the silk or cotton yarn. Most of the units working at the first stage, i.e. "potaii" paid at the rate of Re. 1 per 'pasa' of silver drawn, in the case of only 2 establishments the wage rate was found to be as high as Rs. 2 per 'pasa' because the work was of a different character in that the wire was drawn after gold covering on the silver ingot. At the second stage no such uniformity of wage rates was found as wire was required to be drawn to different gauges and the higher the number of dies through which the wire was required to be drawn the higher was the wage for the worker engaged on that work. Thus it was found that a worker engaged at this stage got anything from Rs. 5 to Rs. 16 per 100 tolas of silver wire, depending upon the thinness to which it was drawn. At the third stage of wire drawing the wages paid varied between 8 annas to Rs. 2 per day per worker depending upon the dexterity of the individual. A few units were also found to make payments on the monthly basis, the rate varying from Rs. 20 to Rs. 60 per month per worker.

2.7. On the whole 31.23 lakh tolas of kalabattu represented the end product of the wire drawing sector, however, it must be mentioned that 4 hand operated units at the Tarkashi or the second stage, turned out 12 thousand tolas of jari wire which did not pass through the third stage but was directly used for embroidery work. Apart from this the figures of production given in Table No. 2.4 for various stages of wire drawing are not additive in that the product of one stage is again used in the next stage. However, an idea of the total quantum of work turned out at the three stages can be obtained by noting that during 1958 over Rs. 37 lakhs worth of silver passed through the first stage, Rs. 30 lakhs worth of material passed through the second stage while the product of the third stage was valued at over Rs. 42 lakhs.

TABLE NO. 2.4

Value in lakhs of rupees and quantity in lakhs of tolas of productions during the year 1958

Stage or process	Hand drawn			Power drawn			Total		
	Qty.	Value	Contract charges	Qty.	Value	Contract charges	Qty.	Value	Contract charges
1	2	3	4	5	6	7	8	9	10
1. 1st stage (Potaii or Pavatha) . . .	9.47	25.15	0.33	5.23	13.34	0.19	14.70	37.49	0.52
2. 2nd stage (Tarkashi or Tania) . . .	0.12	0.60	0.03	9.28	23.67	1.18	9.40	24.27	1.21
3. 3rd stage									
(i) Kalabattu . . .	..	..	..	31.23	42.48	0.20	31.23	42.48	0.20
(ii) Tarkashi or Tania . . .	..	..	..	2.30	5.86	0.01	2.30	5.86	0.01

2.8. The units working on a contract basis apparently had no problem in regard to the channel of marketing. Amongst the other units that worked on their own account it was reported that a majority sold their products on an out-right cash basis while a little less than one fourth of the units sold on consignment basis. A majority of the units working at the Tarkashi stage on their own material sold their wire to the manufacturers of kalabattu. In the kalabattu sub-sector nearly three-fourth of the producers sold the kalabattu to the retailers. It does appear that apart from those which worked on a contract basis, the establishments in the wire drawing sector did not depend much on dealer intermediaries. Their trouble, however, was reported to lie in a different direction in that the vicissitudes of the weavers who used their wire, in turn, affected the jari wire market also.

TABLE NO. 2.5

Important tools and equipments employed

(a) 1st stage (Potaii) :

Section	Golas with ancillary equipment		Machines with ancillary equipment	
	Working	Idle	Working	Idle
Manual	38	5	..	..
Power . . . . .	..	..	8	..

(b) 2nd stage (Tarkashi) :

Section	Wire drawing machine with motor		Charkhas		Flattening machine	
	Working	Idle	Working	Idle	Working	Idle
Manual . . . . .	..	..	16	..	4	..
Power	95	10	..	..	..	..

(c) 3rd stage (kalabattu) :

Section	Wire drawing machines		Twisting machine		Flattening machine		Colouring machine		Charkhas	
	work- ing	Idle	Work- ing	Idle	Work- ing	Idle	Work- ing	Idle	Work- ing	Idle
1	2	3	4	5	6	7	8	9	10	11
Kalabattu only . . . . .	..	..	292	54	194	9	48	1	411	14
Wire drawing and Kalabattu	28	1	30	6	16	2	6	..	30	6
TOTAL	28	1	322	60	210	11	54	1	441	20

2.9. The first stage used simple tools like the traditional golas and machines which represent the new trend. Thirty-eight golas were in the working state while 5 were idle at the time of the survey. All the machines were in an effective working state. The Tarkashi or the second sector had 95 wire drawing machines in the working state and 10 were idle. Of the hand operated equipments called 'charak' 16 were in working state. The final stage of wire drawing industry made use of power equipments like twisting machines, flattening machines, colouring machines and wire drawing machines. Of the 382 twisting machines about 15% were found to be idle. There were 210 flattening machines in working condition and idle capacity was represented by 11 machines. There was no appreciable idle machinery in respect of colouring machines. Similar was the case for wire drawing machines where 28 were in working state and only one was idle. In addition to these, ordinary hand operated charkhas were also used extensively. In the sector, as a whole, it was reported that Rs. 3.68 lakhs were invested in fixed assets whereas Rs. 5.87 lakhs were in the form of raw materials, goods in process and other stocks. A major share of this investment was in the third stage of manufacturing kalabattu as can be seen from table No. 2.6 below.

TABLE No. 2.6

Capital employed in lakhs of rupees

Stage	Hand drawn			Power drawn			Total		
	Fixed	Working	Total	Fixed	Working	Total	Fixed	Working	Total
1	2	3	4	5	6	7	8	9	10
1. 1st stage (Potai)	0.06	..	0.06	0.5	0.01	0.06	0.11	0.01	0.12
2. 2nd stage (Tarkashi)	0.02	0.01	0.03	0.70	1.09	1.79	0.72	1.10	1.82
3. 3rd Stage (Kalabattu) . . . . .	..	..	..	2.85	4.76	7.61	2.85	4.76	7.61
TOTAL	0.08	0.01	0.09	3.60	5.86	9.46	3.68	5.87	9.55

LACES & BORDERS

2.10. Unlike the position at Surat there are no special looms at Varanasi for weaving of borders. It was reported that all the looms (about 30,000) that weave brocades, can be switched over to weaving borders if and when the demand arises. At present they are not so used mainly due to two reasons, *viz.*, often enough the border is directly woven in the body of the sari or blouse piece, not separately; secondly, imitation borders woven with the aid of high power machines at Surat offer serious competition.

2.11. On an intensive search, only 58 units engaging 194 looms were found at the time of the survey to be actually weaving borders as such. The border weaving sector may be considered in three parts; the first consisting of 23 looms which used only jari thread; the second of 34 looms using jari as well as art silk; and the third part having 87 looms using only art silk.

TABLE NO. 2.7
Number of units by section and by ownership

Section	Proprietary	Partner- ship	Total
Jari border	3	3	6
Art silk border	43	1	44
Jari and Art silk border	5	3	8
TOTAL	51	7	58

2.12. The frequency distribution given in the table No. 2.8 gives an idea of the seasonality of the industry. In the art silk border group of 44 establishments, twenty-four worked between 2 to 4 months; ten other establishments worked between 4 to 6 months. The remaining which account for 23 per cent worked for more than six months.

All the composite establishments except one, worked for more than six months a year. In the pure jari sector 4 establishments out of 6 worked for 8 to 10 months, only 2 units had work between 4 to 6 months.

TABLE NO. 2.8
Frequency distribution of number of days worked by section

No. of days worked	No. of units engaged in			Total
	Art silk	Art silk & jari	Jari	
60 & below . . . . .	..	..	..	..
61-120	24	1	..	25
121-180	10	..	1	11
181-240	4	1	1	6
241-300	3	4	4	11
301 & above	3	2	..	5
TOTAL	44	8	6	58

2.13. Border weaving provided employment to 169 hired workers and 117 family workers. Jari border pure and mixed was woven by 176 workers in all, while as many as 110 workers were found engaged in weaving art silk borders. Of the 286 persons employed only 11 acted in a managerial or supervisory capacity while the rest actually wove different items. In all there were 40 women and 28 children working in this sector.

TABLE NO. 2.9
Number of persons employed

Section	Hired	Family	Total
<i>Art silk border :</i>			
(i) Supervisory . . . . .	..	1	1
(ii) Male	42	50	92
(iii) Female . . . . .	..	11	11
(iv) Children . . . . .	..	6	6
(v) Total	42	68	110
<i>Art silk and Jari border :</i>			
(i) Supervisory . . . . .	..	8	8
(ii) Male	76	11	87
(iii) Female . . . . .	..	13	13
(iv) Children	1	5	6
(v) Total	77	37	114
<i>Jari border :</i>			
(i) Supervisory . . . . .	..	2	2
(ii) Male	18	10	28
(iii) Female	16	..	16
(iv) Children	16	..	16
(v) Total	50	12	62
GRAND TOTAL	169	117	286

2.14. Wages were always paid at rates in the border weaving sector on the basis of the number of 'thans' of $4\frac{1}{2}$ yards of length. For weaving one 'than' of pure jari border the wage rate varied from Rs. 9 to Rs. 20 depending upon the designs followed in the borders. The lowest wage rate of Rs. 9 was reported by 2 establishments and Rs. 10 were paid by 3 establishments. One establishment reported the wage rate as Rs. 12 per 'than'. The highest wage rate of Rs. 20 was reported by 3 establishments. However, the rate followed in the 'Kela' border sector was considerably less than the jari border weaving sector. Only one establishment paid at the rate of Rs. 5 per 'than', whereas 21 establishments reported to have followed a wage rate of Rs. 6 per 'than' of Kela border. The highest wage rate of Rs. 7 in the Kela sector was being followed by 8 establishments.

TABLE NO. 2.10

Value in rupees and quantity in thans of the production of borders during the year 1958

Section	Art silk than		Jari thans	
	No.	Value	No.	Value
Jari . . . . .	..	..	370	72,200
Art silk	2,783	47,791	..	..
Art silk and Jari	2,408	43,185	2,588	2,02,912
TOTAL	5,191	90,976	2,958	2,75,112

2.15. It is interesting to note that borders, incorporating copper wire are not used in the whole of Banaras. Nearly 5200 thans of art silk valued at Rs. 91 thousand and 2960 thans of jari valued at Rs. 2.75 lakhs were woven during the reference year 1958.

TABLE NO. 2.11

Basis of marketing the finished product (border)

Basis	Number of establishments			
	Jari	Art silk	Art silk and jari	Total
Outright	2	20	4	26
Consignment	1	10	..	11
Both	3	14	4	21
TOTAL	6	44	8	58

2.16. The border sector worked with its own raw materials. Two establishments weaving pure jari borders sold them on outright cash basis, one sold on consignment basis while three others sold in both the ways. As can be seen from table (2.11) there were in all 26 establishments that sold (jari and art silk) borders on outright basis while 11 establishments sold on consignment basis, the rest followed both systems of marketing. However, it needs particular mention that those who sold on an outright cash basis did not receive the money immediately ; often enough they were given post dated cheques which were realised only after considerable trouble or at considerable margins. Quantitative information relating to goods sold through wholesalers, retailer etc. was asked for, but the respondents were unable to furnish such data. All that can be broadly said is that 26 establishments sold their borders generally to wholesalers while 14 sold to retailers directly, the rest of 18 establishments reported that they sold sometimes to wholesalers and sometimes to retailers.

2.17. The fixed capital invested by an establishment in this sector was limited to handlooms, which cost about Rs. 150 each; there were no other fixed assets in the form of tools and equipments. Total investment came to about Rs. 64,000 for the sector as a whole. It was reported by 58 establishments that about 10 handlooms were idle for lack of demand. However, this is not an exact indication of the idle capacity in view of the basic structure of the industry at Banaras referred to at the outset.

TABLE NO. 2.12
Capital employed

Section	Value in Rs.		
	Fixed	Working	Total
1. Jari border	6,500	21,600	28,100
2. Art silk border	13,430	1,125	15,555
3. Jari & Art silk border	18,750	2,500	21,250
TOTAL	38,680	25,225	63,905

JARI EMBROIDERY

2.18. Zardozi industry is no longer flourishing at Varanasi. It was reported that artisans in this industry had switched over to other means of livelihood as the demand for their artistic skill was dwindling. During the marriage season, however, there is some special demand which is attended to by some artisans. One of the establishments operated on a fairly big scale producing embroidered badges that catered to foreign markets like the U. K. and U.S.A. This establishment was run on a partnership basis as also two other establishments. The rest of the 22 establishments worked on a proprietary basis.

TABLE NO. 2.13
Number of establishments by mode of business

Sector	Mode of business		
	Own account	On contract only	Total
Zardozi on cloth	1	23	24
Zardozi Miscellaneous . . . . .	..	1	1
TOTAL	1	24	25

2.19. The frequency distribution showing the number of establishments working for different days during the year 1958 is given in Table 2.14. Only 2 units worked over eight months, while 14 establishments did not have work for six months in the year. The average number of days worked came to 189 per establishment.

TABLE NO. 2.14.
Distribution of establishments according to the number of days worked during the year 1958

No. of days worked	No. of establishments		
	Zardozi on cloth	Zardozi Misc.	Total
60 and below . . . . .	..	..	..
61—120	3	..	3
121—180	10	1	11
181—240	9	..	9
241—300	2	..	2
301 and above . . . . .	..	..	..
TOTAL	24	1	25

2.20. Of the total employment amounting to 412 persons, four family workers and eight hired workers worked in managerial/supervisory capacity. Of the rest, twelve were children below the age of 14. Besides, there were twenty-four family workers and 364 hired labourers that found employment in the embroidery craft during the year 1958. Female workers were conspicuous by absence.

TABLE NO. 2.15
No. of persons employed

Type of work	Zardozi on cloth			Zardozi Miscellaneous			Total		
	Hired	Family	Total	Hired	Family	Total	Hired	Family	Total
Management & Supervisory	8	4	12	..	..	..	8	4	12
Labour									
(i) Males	359	23	382	5	1	6	364	24	388
(ii) Females	..	..	..	..	..	..	..	..	..
(iii) Children	11	1	12	..	..	..	11	1	12
TOTAL	370	24	394	5	1	6	375	25	400
GRAND TOTAL	378	28	406	5	1	6	383	29	412

2.21. Wages were paid on a piece rate basis varying from Rs. 1.75 to Rs. 2 per bhari of jari embroidered, in the case of 17 establishments. The majority of the establishments paid the lowest of this range *viz.* Rs. 1.75 per bhari. Only one establishment was found to pay Rs. 2.75 per day per worker and 3 units employed household labour. Besides, four establishments manufactured badges of which two paid Rs. 2.25 per badge and the other 2 establishments paid Rs. 3.00 per badge.

TABLE NO. 2.16
Production by items during the year 1958

Item	Quantity	Contract charges (in Rs.)	Value (in Rs.)
1. Sarees	33,975 (Bharis)	69,610	..
2. Badges	34,125 (Nos.)	14,150	1,13,055
3. Others	N.A.	2,700	..

2.22. Important items of manufacture were sarees, badges, mukuts etc. Actual production in quantity could not be ascertained since the establishments engaged in the work, purely on contract basis. The artisans expressed their inability to give the production figure on the ground that the value of production depended on the amount of jari incorporated and the size of the cloth embroidered. The only possibility was to collect the contract charges received by the establishments working on contract. The establishments could, however, furnish only the quantity of jari material that they used in embroidery.

On an average it worked out to be one bhari (nearly one tola) of jari materials per day per worker. From table No. 2.16 it can be seen that during the year 1958, nearly 34 thousand bharis of jari were handled by the artisans getting Rs. 69,610 as contract charges. Over thirty-four thousand badges were manufactured, during the same year valued at Rs. 1.13 lakhs. Besides, there were two establishments which engaged in the embroidery of mukut and other allied types of jari work, their total contract charges being Rs. 2,700 for the year.

2.23. All establishments, except one, worked on contract basis and thus had no marketing problems of their own. The only unit which carried out manufacture with its raw materials exported the badges entirely to foreign countries. However, considerable difficulty was experienced by this unit in procuring the requisite raw materials and it pleaded for relaxation of the import restrictions on superior background cloth and metallic emblems like the eagle and the crown.

2.24. The tools and equipments used in the industry were simple wooden frames on which the cloth to be embroidered is spread, a pair of scissors, a needle and a metallic ring for each worker. These do not make for any sizeable capital in the form of fixed assets. The amount of fixed capital invested was reported as Rs. 13,485 being high on account of one of the establishments owning its building which was used for industrial purposes. In the case of rest of the establishments, the embroidery work was carried on in residential premises. Similarly, in the case of working capital, as on the day of enquiry, the one rather exceptionally big establishment reported about Rs. 75,000 (in the form of raw materials and other goods) while the rest of them had on an average only Rs. 27 as working capital. The total productive capital thus employed in the industry came to about 89 thousand of rupees.

CHAPTER III

SURAT

3.1. The Jari industry is a traditional cottage industry in Surat. It is by far the most important centre of Jari manufacture in India. According to the survey, which was conducted during May-June 1959, the Jari industry at Surat gave employment to 3309 workers in the year 1958 producing Rs. 39.55 lakhs worth of Jari border.

3.2. The ownership pattern is generally proprietary in the handloom sector and is mixed in character (*i.e.*, proprietary as well as partnership) in the powerloom sector. The table below shows the distribution of units according to the type of ownership.

TABLE NO. 3.1

Table showing number of units falling under each type of ownership

Type of Ownership	No. of units	
	Handloom	Powerloom
1. Proprietary	1,277	16
2. Partnership	1	17
TOTAL	1,278	33

TABLE NO. 3.2

Table showing number of units inherited and self-started

	No. of units	
	Handloom	Powerloom
1. Inherited	1,278	27
2. Self-started . . . . .	..	6
TOTAL	1,278	33

3.3. Since the Jari industry is a cottage one in Surat, it is inherited in character in the entire handloom sector whereas in the powerloom sector it is predominantly inherited with only 6 out of 33 units as self-started.

3.4. The handloom sector works entirely on contract basis ; in the powerloom sector 28 units undertake production on their own whereas only 5 units work on wage basis.

3.5. The table below shows the number of units according to mode of work undertaken in the powerloom and handloom sectors :—

TABLE NO. 3.3

Table showing number of units under each category of mode of work undertaken

Mode of work undertaken	No. of units	
	Handloom	Powerloom
1. Own work . . . . .	..	28
2. On wages	1,278	5
TOTAL	1,278	33

3.6. There are no public or private limited companies. The ownership of the establishment is handed down from father to son.

3.7. Moreover, all the units are of horizontal type, except one unit which is vertical in character where all the processes relating to Jari production are carried on in the same unit.

3.8. *Employment.*—It may be mentioned that this industry belongs to the category of low income group. Since the industry is run on cottage basis, the establishments are housed mostly in the residence of the owners ; they are in unhealthy surroundings and the main source of labour is the household. The table below reveals the employment pattern of the industry.

TABLE NO. 3.4

Table showing the average number of persons employed per working day

Source of Labour	Handloom					Powerloom				
	Male	Female	Children	Total	%	Male	Female	Children	Total	%
Family	632	1984	270	2893	96.8	78	53	21	152	47
Hired	4	11	80	95	3.2	159	7	3	169	53
TOTAL	643	1995	350	2988	100	237	60	24	321	100

3.9. It is evident from this table that 2988 and 321 workers were engaged during 1958 in handloom and powerloom sectors respectively. This brings the total employment to 3309 persons.

3.10. *Handloom sector.*—The source of labour in the handloom sector has been mainly the family. About 97 per cent of the labour has been drawn from the family and only the remaining is hired labour. Thus the role of hired labour in this sector is negligible. Again, adult-female family labour is about 66 per cent of the total labour force in the handloom sector. Child labour in the handloom sector is high compared with the powerloom sector.

3.11. *Powerloom sector.*—The situation is somewhat different in respect of the powerloom sector. The incidence of family as well as hired labour occurs in equal proportions. Nearly 47 per cent of the total labour is drawn from the family and about 53 per cent is hired labour. It will be seen from the table No. 3.4 above that hired adult male labour is about twice as much as the family labour. Hired adult female labour is significantly low. The employment of child labour in this sector is rather low and is in fact negligible.

3.12. In order to study the intensity of employment in different parts of the year, provision was made in the questionnaire to collect information relating to the months which were considered to be everbusy, normal, under-worked and nominal. Also, descriptive details were collected whenever an establishment mentioned idle capacity. The survey reveals that the Jari Industry is seasonal in character and hence suffers from the idle capacity. The tables below illustrate this point.

TABLE NO. 3.5

Table showing the intensity of activity in terms of number of days worked in each month in 1958 in the handloom sector

No. of days worked in the month	Number of units											
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Above 20 days	1274	1274	1274	1259	1005	616	6	1	..	3	205	368
10 to 20	2	2	2	17	269	635	1015	785	225	64	44	33
Less than 10	2	2	2	2	4	27	257	492	1053	1211	1029	877
TOTAL	1278	1278	1278	1278	1278	1278	1278	1278	1278	1278	1278	1278

3.13. It will be seen from the above table that there is an appreciable volume of idle capacity in the handloom sector. Generally, the period between January to May is considered to be a favourable season, and the establishments keep the workers engaged more than 20 days in a month. Under-working (i.e. working 10 to 20 days in a month) is prevalent during the months of June, July and August. The employment in the remaining months (Sept.-Dec.) is considered to be only nominal. The reason that the handloom sector attributes to this idle capacity is that it is due to unhealthy competition from the machine sector.

3.14. A similar feature though with some divergence is noticeable in the powerloom sector as shown by the table below :—

TABLE NO. 3.6

Table showing the intensity of activity over the year in the powerloom sector

Number of hours worked per day on production of jari goods	Number of units											
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Above 8	24	21	21	21	12	3	..	..	..	2	20	25
6 to 8 . . . . .	..	1	3	3	5	3	3	3	2	1	2	..
2 to 6	3	5	3	4	11	22	25	25	26	25	6	3
Less than 2	1	1	1	..	..	..	..	..	..	..	..	..
TOTAL	28	28	28	28	28	28	28	28	28	28	28	28

3.15. The intensity of activity in the powerloom sector does not appear to be identical with that of handloom sector ; also the divergence is not much. The period commencing from November to April and to some extent May is considered to be a favourable

season for the production of Jari goods. The period June to October is the season when sufficient work for Jari goods is not available. The salient feature of the table is that the powerloom sector is alternately overbusy or under-worked. The incidence of nil work and normal work is insignificant. This fluctuation in intensity of work is attributed to fluctuation in the demand for Jari goods in the market. During June to October when there is slack demand for Jari articles, the units in the powerloom sector switch over to the production of goods other than Jari such as art-silk ribbons and nylon ribbons.

3.16. Production.—Detailed information regarding quantity and value of production in the powerloom sector could be collected, but in the handloom sector only the quantities of production could be collected as the work is carried out on piece rate basis. The value of production has therefore been computed on the basis of average prices prevailing in the market for various articles.

3.17. Handloom.—The table below shows the quantity and value of production of Fith Kinari and laces and borders during 1958 in the handloom sector.

TABLE No. 3.7
Production in 1958

Item	Figures in lakhs	
	Quantity	Value (Rs.)
1. Fith Kinari:		
(a) Real Fith Kinari (tolas)	7.09	8.86
(b) Imitation Fith Kinari (tolas)	18.31	3.43
TOTAL	25.40	12.29
2. Laces & Borders:		
(a) Real laces & borders (yards)	7.85	11.77
(b) Imitation laces & borders (yards)	8.27	3.11
TOTAL	16.12	14.88
GRAND TOTAL	..	27.17

3.18. Powerloom sector.—There are 33 units engaged in the production of Jari goods in the powerloom sector. Out of this 7 units produce Fith Kinari exclusively, 24 units produce laces and borders exclusively. The remaining two units produce mainly laces and borders with a small quantity of Fith Kinari. Separate figures of production of Fith Kinari for these two units could not be collected and so their entire production has been treated as laces and borders. The table below shows the quantity and value of production of Fith Kinari and laces and borders in the powerloom sector during the year 1958.

TABLE NO. 3.8

Table showing the quantity and value of production of fith kinari and laces & borders in the powerloom sector during the year 1958

Item	Quantity	Value
		(Rs. in lakhs)
1. Fith Kinari (imitation)	30.40 lakh Tolas	3.82
2. Laces and borders (imitation)	35.74 lakh Yards	8.56
TOTAL		12.38

§.19. It may be mentioned here that 5 units producing laces and borders carried out job work and the raw material was supplied by the dealers. The value of their production has been calculated on the basis of average prices and quantity of goods produced.

WAGES

§.20. Generally speaking, the term wage earners refers to hired workers. They comprise both time-rate and piece-rate workers. As pointed out earlier, there has been the occurrence of hired labour in powerloom sector and in the case of handloom sector 96.9% of labour force is drawn from the family, all of them working on piece-rate wages. The following table is for the handloom sector.

TABLE NO. 3.9

Table showing monthly earnings in the handloom sector

Monthly earnings (Rs.)	No. of units	Percen- tage	No. of persons engaged	Percentage
(1)	(2)	(3)	(4)	(5)
Less than 30	878	68.70	1543	51.64
30—50	225	17.61	620	20.75
50—70	87	6.81	308	10.31
70—90	31	2.43	126	4.22
90—110	27	2.11	113	3.78
110—130	14	1.10	155	5.19
130—150	8	0.62	60	2.01
More than 150	8	0.62	63	2.10
TOTAL	1278	100.00	2988	100.00

3.21. From the above table, it is evident that the earnings in about 69 per cent of the total number of establishments accounting for about 52% of the total working force in the handloom sector are below Rs. 30 per month. The next important finding is the average monthly earning of Rs. 30 to Rs. 50 reported in about 18 per cent units accounts for 20 per cent of the total working force. There is a sharp decline both in respect of the number of units and the working force after the earning slab of Rs. 50 to Rs. 70. On the average, a worker employed in the handloom sector earns Rs. 43 per month.

3.22. As regards the wage-structure in the powerloom sector, data could be collected from 27 units only which is presented in the table below :—

TABLE NO. 3.10

Frequency distribution of the number of powerloom units and the number of hired persons falling in various wage intervals

Monthly wage-rate in Rs.	No. of units covered	Percentage to total No. of units	No. of persons employed	Percentage to total employment
25—50	8	29.63	35	21.34
50—75	10	37.04	39	23.78
75—100	6	22.22	46	28.05
100—125	3	11.11	44	26.93
TOTAL	27	100.00	164	100.00

3.23. The average wage-rate works out at about Rs. 77 per worker from this table which is very much higher than the average wage of Rs. 43 earned by a handloom person.

3.24. *Raw materials.*—The Jari industry in Surat uses the following principal raw-materials in the production of Fifth Kinari and laces and borders :—

- (i) *Kasab ;
- (ii) Lametta ;
- (iii) Cotton yarn ;
- (iv) Art silk yarn ; and
- (v) Silk yarn.

3.25. Detailed information as to the quantity of various types of raw materials and their value were collected from the powerloom sector. As regards the handloom sector since the dealers supply the necessary raw materials and the production is carried on piece-rate basis, the quantity and value of raw materials could not be collected directly. It had been worked out indirectly from the quantity and value of output. The quantity and value of raw materials consumed in the production of Fifth Kinari and laces and borders in the handloom and powerloom sectors during 1958 are given in the table No. 3.11.

*Kasab means the gold and silver thread, real as well as imitation which is produced by winding flattened gold and silver wires on yarn of cotton, art silk and silk. The flattened gold and silver wires are of two types namely, (i) pure, having silver base and real gold plated; and (ii) imitation, having copper base gilded with silver and given golden colour by suitable chemicals.

TABLE NO. 3.11

Table showing the consumption of various types of raw materials for the production of fith kinari and laces & borders in the handloom and powerloom sectors of jari industry at Surat during the year 1958

Raw Material	Consumption during 1958			
	Handloom		Powerloom	
	Quantity	Value	Quantity	Value
	lbs. (in'000)	Rs. (in'000)	lbs. (in'000)	Rs. (in'000)
1. Kasab :				
(a) Real	37.36	1494	..	..
(b) Imitation	70.30	355	79.62*	487.62
2. Badla lam etta . . . . .	..	..	8.26	47.98
3. Cotton yarn	0.23	1	19.64	68.54
4. Art silk yarn**	36.13	181	26.63	147.26
TOTAL . . . . .	..	2031	..	751.41

3.26. The most important raw materials, both from the point of view of quantity and value, are Kasab and Lametta. In the production of Kasab and Lametta, the main raw material used is copper wire. Thus primarily the main raw material required by the industry is copper wire. Next in importance comes cotton yarn and equally important is art silk yarn.

3.27. The makers said that there was great difficulty in securing copper wire. The price of copper wire has been rising due to import restrictions. Similarly, in the case of pure silk yarn also there was difficulty in securing supplies in quantity and at a fair price. So far as other raw materials, namely, cotton yarn and art silk yarn, are concerned, these were available locally in adequate quantities and at reasonable price.

3.28. Capital structure.—It was not easy to secure data relating to the capital structure of the industry. In the powerloom sector, the machines and looms are installed in the residence of the workers and the cost of the building could not be easily supplied by the respondents and it was also difficult to separate for purposes of valuation, the residential part and the space used in the industry. In the circumstances, the entire value of building and land has been included in the estimates.

3.29. As regards the handloom sector, since the work is carried on a small loom installed in a corner of the residential area, occupying a very little space, investment has been calculated on the basis of an average of Rs. 10 per loom.

3.30. Similarly, difficulties were experienced in collecting the information relating to the working capital, due to under-estimation or over-estimation by the respondents. The data collected regarding fixed and working capital is given in the table No. 3.12.

*Includes some quantity of real Kasab for which separate figures could not be obtained.

**This includes small quantity of silk yarn, separate figures for which could not be collected.

TABLE NO. 3.12

Table showing the value of fixed and working capital

	(Rs. in' 000)	
	Powerloom	Handloom
A. Fixed Capital :		
(i) Plant and machinery	203.35	38.90
(ii) Furniture and fixtures	3.45	..
TOTAL	206.80	38.90
B. Working Capital	128.35	●
GRAND TOTAL	335.15	38.90

3.31. Inventory of tools and equipment.—It has been earlier mentioned that there is incidence of idle capacity in both the sectors and this conclusion is based on the study of the intensity of activity in the industry. To ascertain this, provision was made in the questionnaire to study the extent of idle capacity that prevailed in tools and equipment. In other words, data have been collected in respect of the inventory of tools and equipment and the number of units actually in use and idle in both the sectors.

Powerloom sector :

TABLE NO. 3.13

Table showing number of looms and other machines in working and idle condition in the powerloom sector

Equipment	Number		
	Working	Idle	Total
Power machines	152	4†	156
Warping machines	30	..	30
Winding machines	60	..	60
Other machines	19	1	20

TABLE NO. 3.14

Table showing number of tools and equipment electrically operated and hand-operated in the powerloom sector

Equipment	Mode of operation		
	by electricity	by hand	Total
Power machines	152	..	152
Warping machines . . . . .	..	30	30
Winding machines	26	34	60
Other machines	20	..	20

*Work is undertaken on piece-rate basis and raw materials are supplied by the dealers.

†When the demand for jari goods is slack, these are switched over to the production of non-jari articles such as art silk, ribbons, etc.

TABLE No. 3.15
Average cost per unit of equipment

Equipment	Price per unit in Rs.
Powerloom machines	564
Warping machines	45
Winding machines	22

3.32. *Idle capacity.*—The table No. 3.13 above leads one to conclude that the extent of idle capacity in the machine sector is almost nil as the reported 4 idle power machines were actually switched over to the production of non-jari articles namely art-silk, ribbons etc. when the demand for jari goods was slack. The idle capacity in regard to other equipment is negligible. Generally, warping machines are hand operated and winding machines are operated both by hand and power.

3.33. The tools and equipment that are in use in Surat are locally manufactured except those of crochet and baby finishing machines. No trouble is involved in securing these machines. For repair and maintenance of these equipments, local facilities are ample and readily available.

3.34. The average cost of powerloom machine may be taken at about Rs. 560. Each powerloom machine, has, on the average, 8 heads. The exceptional case of a bigger machine with 60 heads was also spotted. The other principal equipments that are used in the process of manufacture are warping and winding machines which cost on the average about Rs. 45 and Rs. 32 respectively.

3.35. *Handloom sector.*—Information has also been collected to assess the idle capacity in the handloom sector. There have been in all about 3890 handlooms. About 900 handlooms remain idle, which is about 23 per cent of the total capacity. The average cost of a handloom comes to about Rs. 10.

CHAPTER IV

FOURTEEN OTHER CENTRES

4.1. Besides Surat and Banaras which are by far the most important centres of this industry, the survey also covered Delhi, Agra, Bareilly, Lucknow, Ajmer, Jaipur, Bhopal, Bombay, Patna, Hyderabad, Paithan, Bangalore, Madras and Tiruchi. These fourteen centres together have 973 establishments engaged in different processes, as broadly indicated in the first chapter. Of these, the majority comprise units (642) embroidering silk or cotton cloth with jari thread, real or imitation. Next comes the lace and border sector, wherein there are 123 semi-automatic handloom establishments, 70 establishments with simple handlooms and 8 establishments with powerlooms weaving borders of different widths. The sector producing gold and silver thread comprises 61 establishments of which more than half are run with the help of power. Besides these, 69 establishments were engaged on miscellaneous types of jari work, e.g. embroidery on shoes, hand bags, sehras etc. particularly at Delhi, Ajmer and Jaipur. Of the total establishments, nearly 6% run with the help of power as against 94 per cent operated mainly with human labour. It may however, be noted that semi-automatic looms have been included in the latter group, as they are merely mechanical contrivances which add to productivity without dependence on power.

TABLE NO. 4.1

Number of establishments by sectors

Sector Centre	Wire drawing		Lace & Border			Zardozi on cloth		Misc.	Total
	Hand	Power	Hand-loom	Semi-automatic loom	Power-loom	By hand	By machines		
0	1	2	3	4	5	6	7	8	9
1. Delhi	4	14	1	..	6	163	5	31	224
2. Agra	2	..	3	..	..	229	..	..	234
3. Bareilly . . . . .	..	..	..	..	..	62	..	..	62
4. Lucknow	10	..	4	..	..	21	..	..	35
5. Ajmer . . . . .	..	13	3	74	2	14	7	20	133
6. Jaipur	2	4	8	49	..	25	..	12	100
7. Bhopal . . . . .	..	..	..	..	..	26	..	6	32
8. Bombay	2	5	3	..	..	23	..	..	33
9. Patna	2	..	10	..	..	23	..	..	35
10. Hyderabad . . . . .	..	..	3	..	..	38	..	..	41
11. Paithan . . . . .	..	..	35	..	..	..	..	..	35
12. Bangalore . . . . .	..	3	..	..	..	..	..	..	3
13. Madras . . . . .	..	..	..	..	..	3	1	..	4
14. Tiruchi . . . . .	..	..	..	..	..	2	..	..	2
TOTAL	22	39	70	123	8	629	13	69	973

4.2. Considering the situation at various centres differentially it may be observed from the table No. 4.1 that the industry is more concentrated at Agra and Delhi whereas centres like Bombay, Bhopal and Paithan come at the lower rungs of the ladder. However, Ajmer and Jaipur appear to be more important than the above figures would indicate, inasmuch as, it is only at these places that we find a considerable number of semi-automatic looms which may be considered a recent healthy development. Within the wire-drawing sector, it would appear Bangalore, Ajmer and Delhi are dominated by the power operated units, while the work at Agra, Lucknow and Patna is entirely done by manual process. The data thrown up by these studies indicate that Bareilly, Bhopal, Hyderabad and Paithan get all the supply of jari thread from outside. Surprisingly, power-loom weaving laces or borders were found only at Delhi and Ajmer, while hand-loom at most of the centres complained of competition from the power loom sector, apparently situated in far off places like Surat. There were 5 mechanical units reported at Delhi and 7 at Ajmer for embroidering with the jari thread.

4.3. Of the 973 establishments 93.4 per cent had a proprietary basis of ownership while only 5.2 per cent were run as partnership concerns. The remaining 13 (1.4%) were cooperatives. Dominance of the proprietary type of ownership obviously indicates the unorganised nature of the industry in general. Considered from a different angle it was found that 68.4 per cent of the units worked on the basis of fixed rates for fixed amount of work done at the instance of dealer-financiers. In addition to this, 135 establishments worked on the basis of contract, mainly using their own raw material and implements. Only 14.5 per cent of the establishments worked on own account, retaining the full entrepreneurial functions to themselves. The rest of the units were of mixed type combining work under different modes of business.

TABLE NO. 4.2
Number of days worked by sectors

No. of days worked	Wire drawing		Lace & Border			Zardozi on cloth		Misc.	Total	
	Hand	Power	Hand-loom	Semi-automatic loom	Power loom	By hand	By machine			
	0	1	2	3	4	5	6	7	8	9
60 days & below		4	..	8	3	..	4	..	..	19
61—120		4	..	11	1	..	126	2	27	171
121—180		8	2	17	6	..	345	5	20	403
181—240		5	5	16	34	2	44	9	4	113
241—300		1	26	12	67	4	76	2	11	199
301 & above		..	3	6	12	2	34	1	7	65
ALL		22	36	70	123	8	629	13	69	970

NOTE.—Data for Bangalore not included, no such data was collected in case of Bangalore.

4.4. An idea of the under-employment prevailing in the industry can be had from the frequency of engagement given by the number of days they worked as shown in table No. 4.2. It is evident from the table that a majority of the establishments reported the busy period to be only between 4 to 6 months in the year. While 190 establishments, did not get work even to that extent, only 65 establishments *i. e.* 6.7 per cent were reported to be busy for more than 10 months in a year. Analysing the position separately for the units operated with power as against units operated without power, it was found that the majority of power operating units found work for more than 8 months in a year, while those working manually had a concentration of work between 4 to 6 months only. On the whole, the power operated units worked for 265 days on the average in a year, while the corresponding average number of days for the hand sector was only 185. It is significant that 3 establishments operating on semi-automatic looms reported that they worked for less than 2 months in a year, while 16 other establishments operated by hand were in the lowest category. Considerable number of hand operated establishments fall in the highest class of frequency as can be seen from the table No. 4.2. Amongst the centres, it appears that by and large the establishments at Jaipur and Ajmer had comparatively more days of work, while those at Delhi, Agra and Paithan had much less work.

TABLE No. 4.3
Type of employment by sectors

Sectors	Employment		
	Family	Hired	Total
<i>Wire Drawing—</i>			
Hand	46	51	97
Power	47	459	506
ALL	93	510	603
<i>Lace & Border—</i>			
Handlooms	145	118	263
Semi-automatic looms	290	269	559
Powerlooms	13	17	30
ALL LOOMS	448	404	852
<i>Zardozi on cloth—</i>			
By hand	1,453	2,892	4,345
By machine	16	51	67
ALL	1,469	2,943	4,412
Miscellaneous	165	159	324
ALL SECTORS	2,175	4,016	6,191

4.5. A little less than 6,200 persons were reported to be employed in the jari industry at these centres all taken together. Of these nearly 4,000 were engaged on wages, either piece rate or time rate, while the rest of over 2,100 constituted workers from within the family.

TABLE No. 4.4
Employment under different categories by sectors

Sectors	Males	Females	Children	Total
0	1	2	3	4
<i>Wire Drawing—</i>				
Hand	75	22	..	97
Power	501	2	3	506
TOTAL	576	24	3	603
<i>Lace & Border—</i>				
Handlooms	102	157	4	263
Semi-automatic looms	412	110	37	559
Powerlooms	22	6	2	30
TOTAL	536	273	43	852
<i>Zardozi on cloth—</i>				
By hand	2,083	1,977	285	4,345
By machine	49	18	..	67
TOTAL	2,132	1,995	285	4,412
Miscellaneous	120	173	31	324
All sectors	3,364	2,465	362	6,191

4.6. Looked at from another angle, 3364 of the workers were males and 362 were children below the age of 15; a substantial percentage of the workers (39.6%) were females, mostly working in their own houses on embroidery with jari thread. As between different sectors, women and children find employment in the zardozi sector to a great extent and in the lace and border sector to a lesser extent, while in the wire drawing sector they are insignificant compared to the number of male workers.

TABLE No. 4-5
Employment in various sectors by centres

Centres	Sector								Misc.	Total
	Wire drawing		Lace & Border			Zardozi on cloth				
	Hand	Power	Hand loom	Semi-automatic loom	Power loom	By hand	By machine			
0	1	2	3	4	5	6	7	8	9	
1. Delhi	4	212	1	..	21	754	30	101	1,123	
2. Agra	2	..	6	..	..	785	..	..	793
3. Bareilly . . . . .	..	..	..	..	..	597	..	..	597
4. Lucknow	54	..	36	..	..	154	..	..	244
5. Ajmer . . . . .	..	104	7	287	9	105	26	33	571
6. Jaipur	12	53	24	272	..	1,082	..	161	1,604	
7. Bhopal . . . . .	..	..	..	..	..	304	..	29	333
8. Bombay	9	38	7	..	..	141	..	..	195
9. Patna	16	..	89	..	..	37	..	..	192
10. Hyderabad . . . . .	..	..	6	..	..	303	..	..	309
11. Paithan . . . . .	..	..	87	..	..	..	..	..	87
12. Bangalore . . . . .	..	99	..	..	..	..	..	..	99
13. Madras . . . . .	..	..	..	..	..	22	11	..	33
14. Tiruchi . . . . .	..	..	..	..	..	11	..	..	11
TOTAL	97	506	263	559	30	4,345	67	324	6,191	

4.7. From the point of view of inter-centre comparison, it is found that Jaipur gives employment to the largest number of persons while Delhi ranks second of the 14 centres covered in this chapter. By comparison, Paithan appears now to be reduced to a very small centre of this industry, whatever its past glory. The establishments operated by power employed only 17.4 per cent of the total workers, in this respect, the power operated units at Delhi claim a lion's share. It is the zardozi work by hand at Jaipur, Agra, Delhi and Bareilly that offers comparatively large employment. Within the wire drawing sector, the power drawn units employ nearly 5 times as much labour as the hand operated, all centres taken together. On the contrary, the other sectors of the jari industry are not similarly dominated by the power operated units. Jaipur has the highest number of hired workers, providing a good contrast to Paithan where the industry is carried on mostly by family labour. At Bareilly no woman was reported to work in this industry, while at Bombay their number was as insignificant as 3 out of the total strength of 195 workers. By and large, Jaipur and Bareilly gave employment to over 100 children each, the corresponding figure was insignificant at Bombay, Patna and Bhopal. It

may be observed here in passing that the employment at Delhi seems a little less than it should be because the period of the survey happened to be a lean month when artisans belonging to nearby places like Moradabad, Bareilly and Lucknow had not yet come over to Delhi for the seasonal rush of work. At Hyderabad, slightly more employment than is recorded here was reported, as a phenomenon of disguised unemployment with more than requisite number of persons being partially attached to the same and limited set of tools and equipment.

TABLE No. 4.6
Capital employed by sectors

Sectors	Nature of capital		
	Fixed capital (Rs.)	Working capital (Rs.)	Total (Rs.)
1	2	3	4
<i>Wire drawing—</i>			
Hand	11,455	21,050	32,505
Power	12,02,220	11,16,250	23,18,470
ALL	12,13,675	11,37,300	23,50,975
<i>Lace & Border—</i>			
Handlooms	9,762	7,889	17,651
Semi-automatic looms	1,51,435	6,97,672	8,49,107
Powerlooms	69,200	95,400	1,64,600
ALL LOOMS	2,30,397	8,00,961	10,31,358
<i>Zardozi on cloth—</i>			
By hand	1,49,417	2,87,240	4,36,657
By machine	73,360	10,068	83,428
	2,22,777	2,97,308	5,20,079
Miscellaneous	11,196	22,812	34,008
All sectors	16,78,039	22,58,381	39,36,420

4.8. The total productive capital employed in the industry at the 14 centres altogether was valued at a little less than 40 lakhs of rupees, of which 42.6 per cent was in the form of fixed assets. As is to be expected 80.1 per cent of the fixed capital was in the power operated sector, while the establishments operating semi-automatic looms had a little more than Rs. 1.5 lakhs of investment. The wire drawing sector had more than five times the fixed capital obtaining in the lace and border sector. It would appear that requirements of working capital are slightly more for the wire-drawing sector than for the lace and border sector. On the whole, both these sectors have nearly equal productive capital. The requirements of the zardozi sector are in comparison much less as can be seen from the above table. Making inter-centre comparison, it was found that a large part of the capital is located at Ajmer, Delhi, Bangalore and Jaipur, while the other centres have comparatively much less; this may partly be accounted for the predominance at these centres of power operated units as also those having semi-automatic looms.

TABLE NO. 4.7

Production (quantity) at various centres by sectors (real jari and jari goods)

Centres	Sectors							
	Wire drawing (tolas)		Lace and Border (Yds.)			Zardozi on cloth (tolas)		Miscellaneous (Tolas)
	Hand	Power	Handloom	Semi-automatic loom	Power loom	By hand	By machine	
1	2	3	4	5	6	7	8	9
1. Delhi	1,600	..	..	..	..	1,09,534	2,170	17,452
2. Agra	..	..	..	..	..	4,345	..	..
3. Bareilly	..	..	..	..	..	3,667	..	..
4. Lucknow	55,200	..	68,430	..	..	42,295	..	..
5. Ajmer	..	1,20,000	5,000	40,85,500	..	37,140	27,230	..
6. Jaipur	28,800	5,00,000	22,640	55,59,955	..	3,56,490	..	35
7. Bhopal	No real jari goods							
8. Bombay	30,000	1,72,400	4,900	..	..	N.A.	..	..
9. Patna	8,850	..	..	..	..	10,059	..	..
10. Hyderabad	..	..	N.A.	..	..	81,567	..	..
11. Paithan	..	..	15,090	..	..	..	..	29 sarces plus 116 palleo border
12. Bangalore	Quantity figures have not been collected at Bangalore.							
13. Madras	}	No real jari goods						
14. Tiruchi								
TOTAL	124,450	7,92,400	1,16,060	96,45,455	..	6,45,097	29,400	N.A.

4.9. On the whole, nearly 9½ lakh tolas of real jari wire was drawn during the year 1958 at these centres. As much as 86.4 per cent of this product came from the power operated units, whereas only 13.6 per cent was drawn by the hand sector. In respect of laces and borders, it was found that nearly 98 lakh yards of border were woven during the year, of which 98.9 per cent was woven on semi-automatic looms, and the rest was woven on simple handlooms. It should be noted here that power looms at these centres do not weave laces and borders with real jari thread. In respect of the zardozi sector production was reported in terms of quantity of jari thread put on the cloth, because cloth of different varieties and sizes embroidered at different places (mostly on a contract/wages basis) could not otherwise be aggregated together in an overall figure. In all the centres taken together, 6.5 lakh tolas of jari thread was embroidered by hand and 0.3 lakh tolas by machine. Over 17,000 tolas of jari thread was also used at Delhi and Jaipur for embroidering shoes, hand bags and miscellaneous articles. At Paithan 116 pallow borders were woven besides 29 brocades during 1959.

TABLE NO. 4.8

Production (quantity) in various centres by sectors (imitation)

Centre	Sector								Misc. (Tolas)
	Wire Drawing (tolas)		Lace and Border (Yds.)			Zardozi (tolas)			
	Hand	Power	Hand loom	Semi-automatic loom	Power loom	By hand	By Machine		
1	2	3	4	5	6	7	8	9	
1. Delhi	28,200	1,54,97,080	1,000	..	77,71,760	2,54,396	35,412	85,712	
2. Agra	7,750	..	8,640	..	..	1,50,210	..	..
3. Bareilly	..	..	..	..	..	69,546	..	..
4. Lucknow	..	..	..	..	..	..	..	..
5. Ajmer	..	73,32,000	8,840	1,52,31,390	5,44,000	200	..	1,35,615	
6. Jaipur	18,000	5,00,000	3,250	80,70,695	..	1,05,225	..	12,547	
7. Bhopal	..	..	..	..	..	1,62,204	..	20,196
8. Bombay	..	..	..	..	..	..	..	..
9. Patna	..	..	1,92,300	..	..	200	..	..
10. Hyderabad	..	..	..	..	..	..	..	..
11. Paithan	..	..	..	..	..	..	..	..
12. Bangalore	Quantity Figures have not been collected at Bangalore.								
13. Madras	..	..	..	..	..	8,600	300	11,900
14. Tiruchi	..	..	..	..	..	5,550	..	5,550
TOTAL	53,950	2,33,29,080	2,12,030	2,33,02,055	83,15,760	7,56,131	35,712	2,71,520	

4.10. In addition to the work on real jari, imitation zari work was also in vogue at Delhi, Ajmer, Bhopal, Jaipur, Agra, Patna and Bareilly.

As can be seen from the above table, nearly 233 lakh tolas of imitation thread came from the power operated units, while hand operated units accounted for a little less than 54,000 tolas only. Laces and borders amounting to more than 233 lakh yards of imitation jari were woven on semi-automatic looms, while a little more than 2 lakh yards of imitation borders were woven on simple handloom. In all 7.92 lakh tolas of imitation jari thread was embroidered on different kinds of cloth at various centres, of which only an insignificant percentage (4.5) was embroidered on machine. Besides, all these, nearly 2½ lakh tolas of imitation jari was used in embroidering miscellaneous articles like shoes and bags etc. On the whole it appears that imitation jari was used more at Ajmer, Jaipur and Delhi as compared to other centres. At Bhopal, jari work was mostly combined with beadwork, while at Hyderabad and Lucknow different varieties of embroidery like kamdani were more in vogue.

CHAPTER V

SUMMARY OF RESULTS AND CONCLUSIONS

5.1. One of the important questions remitted to the Jari Enquiry Committee was that of competition between the handloom and the powerloom sectors. It is evident from the foregoing chapters that while there is a concentration of powerlooms weaving laces and borders at Surat, they are conspicuous by their absence at some of the other centres surveyed so far. Even so, the powerloom sector is so strong in terms of production that it excels the handlooms production of all the centres, put together. Semi-automatic looms located at Jaipur and Ajmer also account for a sizeable quantum of production. In terms of productivity the three sectors compare broadly as below :—

TABLE NO. 5.1

	Output/Emp yds./mandays	Output/Capital yds./Rs.	Capital/Emp. Rs./workers
0	1	2	3
Powerlooms	989.50	50.52	5486.67
Semi-automatic looms	216.54	38.80	1518.97
Handlooms	5.53	7.83	155.99

(Except for Surat where data e. g. mandays etc. were not collected.)

5.2. Column No. 1 gives the quantity of laces and borders (real and imitation) woven per manday. Output was measured in quantity rather than in value terms because of the difficulties explained in para No. 1.6 before. Moreover, it is desirable to note that the above ratios reflect the actual conditions in the industry as observed during the survey; they are not based on assumptions of technologically warranted working capital, optimum utilisation of capacity etc. Even so the figures incorporated in the above table indicate the magnitudes involved for comparative analysis. In overall terms, there are at the places covered in this study 3537 artisans working on 4285 handlooms, 559 persons working on 372 semi-automatic looms and 351 persons working on 179 power-looms, Besides these, 976 handlooms, 26 semi-automatic looms and 11 powerlooms were reported to be lying idle on the day of enquiry.

5.3. It is evident that the handloom sector finds it difficult to compete with the powerloom sector; because the productivity of capital in the powerloom sector is six times the productivity of capital in the handloom sector, and the productivity of labour is nearly 179 times that in the handloom sector. In this context, the position of semi-automatic looms is somewhere between, perhaps nearer the handloom sector. On the one hand the semi-automatic loom produces nearly 40 times as much as a handloom, employment being equal; on the other hand a powerloom produces nearly 4 times as much as a semi-automatic loom with the help of the same number of workers. It is clear on this score that the semi-automatic equipment competes with the traditional handloom to some extent; but what is more important is that the competition from powerlooms is much more severe. It may be noted that the number of handlooms lying idle were as observed during the enquiry; but similar displacement that took place resulting in the closure of handloom establishments before the time of the survey could not be so ascertained for obvious reasons.

5.4. Yet another body of data that is relevant for consideration of the problem of competition concerns the relative cost of production of similar items on powerlooms and handlooms. In this connection, it was deemed fit to rely on the figures computed by

the staff in the costing department of the Textile Commissioner's Office for the Jari Enquiry Committee, as similar facilities were not available during this survey nor was it thought, necessary to duplicate the effort. The comparative cost analysis of weaving a "Lover's Tikki" as given at page 94 of the Jari Enquiry report may be reproduced here.

TABLE NO. 5.2

Cost analysis of "Lover's Tikki" (8 yds. of 1'-4" width) weighing 14 tolas

Items	By hand (value in Rs.)	Items	By machine (value in Rs)
1	2	3	4
(i) Kasab 12 tolas	1.87	Kasab 12 tolas	1.87
(ii) Tiki 2 tolas	0.50	Tiki 2 tolas	0.50
(a) Cost of materials	2.37	Cost of materials	2.37
(iii) Wages	1.31	Wages	0.08
(iv) Packing charges	0.09	Packing charges	0.09
(b) Total	3.77	Total	2.54
		Depreciation	0.66
		Total	2.60
Cost per tola	0.27	Cost per tola	0.18
Selling price	0.31	Selling price	0.31
Capacity 20 tolas by Hand		Capacity 500 tolas per machine. per day.	

5.5. It is interesting to note that the machine has a price advantage of nine nP. per tola of border woven. Putting it differently one finds that while the machine operator gets a margin of 13 nP. per tola, the margin for a handloom weaver is only 4 nP. per tola, which obviously makes it difficult for him to compete. Another dimension is added to this comparison when we note that one such machine has the capacity to turn out 500 tolas of border per day, while to weave that length 25 handlooms need to work the same period.

5.6. There are certain items like Muglai Kori border that are at present mainly woven by the handloom sector. The cost structure related to the weaving of this item is given in the aforesaid report as :

TABLE NO. 5.3

Cost analysis of "Muglai Kori" (16 yds. of 3/4" width) weight 8 tolas

Item	Value in Rs.
Imitation wire (5 tolas)	0.56
Cotton yarn (3.25 tolas)	0.37
Total materials	0.93

TABLE No. 5.3—*contd.*

Item	Value in Rs.
Wages	0.47
Warping charges	0.12
Gilding charges	0.31
Packing charges	0.09
	GRAND TOTAL
	1.92
Cost per tola	0.24
Selling price	0.22 to 0.26 per tola
Productive capacity	20 to 25 tolas per day per loom

5.7. So far as the competition between the hand and the machine sectors is concerned, items like this constitute what may be called the non-competing sphere of production. None-the-less, it is distressing to note that the margin between cost and selling price on which the handlooms are to operate is negligible (being only 2 nP.) and sometimes even minus. It may incidentally be observed that the solution perhaps lies in reducing the wage component of the cost which is as high as 50% at present.

5.8. Another aspect of the competition relates to the wire drawing sector. It was reported that the final product *viz.*, 'Kalabattu' of centres like Banaras is finding severe competition from the 'Kasab' of Surat on two accounts. Firstly, the proportion of silver content in the Kalabattu at other centres is reported to be generally higher than that of the Surat product, which is thus cheaper. Secondly, the manufacturers and dealers of jari at Surat were reported to be capturing other markets by dumping large quantities of jari on consignment basis to their agents and dealers. Consequently, the manufacturers who work on a smaller scale at other centres get almost ousted from the market because of inadequacy of capital. It was observed at Delhi, for instance that during the slack period of the jari thread industry, the equipment is often switched over to produce copper wire for electric cables etc. Considerable effort is reported to have been made by the entrepreneurs particularly at Varanasi to manufacture jari of the same metallic composition as done at Surat. Some of them are reported to have spent large amounts on small scale research in an attempt to get at the process of attaining the same lustre with similar alloy composition. They could not, however, succeed with their present small machinery and ignorance of the chemical processes which the Surat people are reported to keep a guarded secret.

5.9. This is a case where inter-centre competition gets interlinked with that between two modes of working, because of a concentration of efficient mechanical wire drawing units at Surat. But, even if one sets aside this special aspect of the problem, some thought has to be given to the detrimental impact of mechanised units on the hand sector. From the data collected during the course of this study it appears that production of 94,700 tolas wire at the end of Pavtha-stage requires 1204 mandays to be put in by hand, whereas the same outturn requires about 578 mandays by mechanical process. Similar estimates for production of 12000 tolas wire at the end of Tania stage are 2740 mandays by hand and 591 mandays by machine respectively. Broadly speaking this means that on the whole roughly 25% of the workers in the hand process can be absorbed at the current level of demand if the same is mechanised, and the rest *i.e.*, say 75% have to be rehabilitated outside the industry.

5.10. At some places like Banaras, it was found that the handloom used for weaving laces and borders does not differ much from the hand loom used for weaving other types of cloth. Hence, the looms of jari weavers do not remain idle even when there is lack of demand for jari laces and borders; the looms are utilised during the slack season for weaving cotton sarees and dress material. Moreover, the weavers at Banaras regard the weaving of brocades as more important than the weaving of separate laces or borders for sale. In spite of these factors, it was reported by many weavers that weaving of pure jari borders received some set-back due to (1) laces and borders woven by powerlooms at Surat and other centres, and (2) the imitation borders which are much cheaper. It appears that there is some internal competition within the handloom sector itself as the weavers of jari laces and borders are losing their market to similar borders woven with either imitation thread or other cheaper fibres like nylon or artificial silk. It may therefore be inferred that the 187 looms weaving imitation borders towards 1958 were perhaps working on pure jari borders before long; similarly it is feared that even 124 looms which were found to be weaving pure jari borders at the time of survey, may gradually switch over to imitation and other weaving due to the forces operating in the market. It may also be mentioned that, of late, there is further bias towards the use of simple thread for the borders in the place of pure jari or art silk, obviously in view of the price advantage.

5.11. It was reported that the jari weavers constitute the most depressed sector of the industry. This is mainly due to the fact that they are at the mercy of the dealer-intermediaries who dominate the market. The weavers have no holding capacity; neither are they organised enough to sell their products independently on their own. In short, while the dealers purchase the goods from the jari weavers at comparatively low prices, permitting only subsistence wage to the artisan, it was reported that they sell the goods at much higher prices to the consumers thereby appropriating quite a sizeable margin. A few persons in the wire drawing sector also said that the depressed condition of the weavers, in turn, affects the wire drawing sector also. A further malpractice of the market seems to be the prevalent system of post-dated cheques which are realised by the artisans with considerable difficulty and delay; if they want to avoid this difficulty and delay they are told by the dealers to accept cash for an amount which is less than the face value of cheques. Thus the producer stands to get less than the actual worth of his goods because the dealers dictate the prices and the producer has no holding capacity. It appears, therefore that there is an urgent need of organising suitable marketing facilities independently of the dealers, perhaps, on a cooperative basis, so as to ameliorate the conditions of the weavers.

5.12. The zardozi sector too is in no better condition. At many of the centres, particularly Agra, Bhopal, Bareilly and Jaipur, it was observed that embroidery work is mostly carried out by "pardanasheen" muslim women in their own houses, on the basis of orders placed by agents or dealers. Apparently, they work part time during their leisure hours in order to supplement the family income, their earnings being as low as Re. 0.50 to 0.75 a day. Being unorganised they do not have any bargaining power and the piece rates at which they work are very low indeed. This state of affairs was reported to have a doubly unsound effect on the production machinery *viz.*, in the first instance, the quality of the articles that they turn out is so cheap and shoddy that people particularly at Agra, preferred not to accept the articles. Secondly, these common goods have, because of their cheapness adversely affected the market for quality goods. Another aspect of the situation, emphasised by some workers at Lucknow, is that the demand for quality goods appears to be shrinking day by day resulting in production in excess of the demand for it. One of the old craftsmen at Agra went to the extent of representing to the Survey Officer that unless steps were taken to ban the cheaper stuff, the traditional art for which the place has been renowned since the Moghal period would be facing slow but sure extinction. Apart from the personal bias or exaggeration in this account the fact remains that in a commodity which should be eminently artistic, reduction of the wage-component

except through suitable technological improvement would lead to deterioration of standards. The jari articles those are nowadays sold at cheap prices in Agra and other places are indicative of the exploitation of unorganised artisans ; the latter need to be suitably guided in workmanship and paid adequate remuneration for good work. The objective of developmental policy in this field, therefore needs to be for bringing prices within the reach of a larger circle of consumers, without lowering the quality of artistic work.

5.13. In fine, it appears that in the past the jari industry had flourished at various places in the country and was patronised by the upper classes in the society, particularly during the Moghul rule. While this patronage has dwindled during the course of time, the costly nature of the basic raw material as well as shifts in consumer's tastes have put jari articles now beyond common demand. This is briefly the tale that artisans at places like Lucknow, Agra, Hyderabad and Delhi have to tell. In all likelihood, quite a number of the traditional craftsmen have left the industry due to factors, of uneconomic operation. Of those that remain, a majority constitutes women working part time in their homes on the basis of orders placed by the dealer-financiers community. There is also the other class of entrepreneurs at places like Surat who thrive by reason of increase in productivity through mechanization. It is only a few superior craftsmen working on brocades of Banaras, Paithan and the like that can be said to have really preserved the art amidst all these vicissitudes. From the view point of resuscitating the ancient heritage of workmanship, Government should take urgent steps to organise these artisans into cooperatives or other suitable associations for the purpose of extending credit as well as for marketing. As it is, the industry is dominated by the dealer-financier reducing a majority of the artisans to the position of wage earners or contract workers. In part, this is also due to the lack of vertical integration not only in terms of individual establishments but also in terms of different centres ; to some extent the specialisation may seem unavoidable but where it is possible to combine thread making with either weaving or embroidery the difficulties of marketing the intermediate product may be solved. On the other hand, they need to be given suitable guidance in making the designs attractive while keeping the cost within the reach of common people. That would perhaps enable this ancient craft to regain economic viability and help the artisans to earn a better living.

APPENDIX

TABLE NO. I

Number of establishments in various centres by ownership

Name of the centre	Type of ownership			Total
	Proprietary	Partnership	Others	
1	2	3	4	5
1. Delhi	203	12	9	224
2. Agra	232	2	..	234
3. Bareilly	60	1	1	62
4. Lucknow	33	1	1	35
5. Ajmer	125	8	..	133
6. Jaipur	84	15	1	100
7. Bhopal	25	6	1	32
8. Bombay	30	3	..	33
9. Patna	35	..	..	35
10. Hyderabad	40	1	..	41
11. Paithan	35	..	..	35
12. Bangalore	2	1	..	3
13. Madras	4	..	..	4
14. Tiruchi	1	1	..	2
Total for 14 Centres				
	909	51	13	973
Total for 15 Centres				
15. Varanasi	334	25	..	359
Total for 16 Centres				
16. Surat	1,293	18	..	1,311
GRAND TOTAL				
	2,536	94	13	2,643

TABLE NO 2

Number of establishments in various centres and their mode of business

Centres	Mode of business						Total
	Own account	Own account & on contract	On contract only	On wages only	Own account & on wages	On wages & contract	
1	2	3	4	5	6	7	8
1. Delhi . . .	17	..	8	199	..	..	224
2. Agra . . .	1	1	14	216	..	..	234
3. Bareilly . . .	2	3	5	52	..	..	62
4. Lucknow . . .	..	..	1	34	..	..	35
5. Ajmer . . .	35	..	1	90	7	..	133
6. Jaipur . . .	41	2	14	38	5	..	100
7. Bhopal . . .	31	1	..	..	..	..	32
8. Bombay . . .	..	..	5	26	..	2	33
9. Patna . . .	12	4	11	8	..	..	35
10. Hyderabad . . .	..	..	41	..	..	..	41
11. Paithan . . .	..	..	35	..	..	..	35
12. Bangalore . . .	3	..	..	..	..	..	3
13. Madras . . .	..	4	..	..	..	..	4
14. Tiruchi . . .	..	1	..	1	..	..	2
Total for 14 Centres	142	16	135	666	12	2	973
15. Varanasi . . .	257	3	99	..	..	..	359
16. Surat . . .	28	..	..	1,283	..	..	1,311
GRAND TOTAL	427	19	234	1,949	12	2	2,643

TABLE NO. 3

Number of establishments in various centres by number of days worked during the year 1958

Centre	60 days & below	61-120	121-180	181-240	241-300	301 & above	Total
0	1	2	3	4	5	6	7
1. Delhi . . .	2	84	94	16	21	7	224
2. Agra . . .	2	2	211	4	13	2	234
3. Barcilly . . .	..	44	14	..	4	..	62
4. Lucknow . . .	..	5	20	7	3	..	35
5. Ajmer . . .	1	6	23	35	65	3	133
6. Jaipur . . .	3	10	10	21	40	16	100
7. Bhopal . . .	..	1	..	..	3	28	32
8. Bombay . . .	1	7	13	6	5	1	33
9. Patna . . .	3	2	14	12	4	..	35
10. Hyderabad . . .	..	..	..	4	34	3	41
11. Paithan . . .	7	10	4	8	1	5	35
12. Bangalore . . .	Data for number of days worked have not be collected.						
13. Madras . . .	..	..	..	..	4	..	4
14. Tiruchi . . .	..	..	..	..	2	..	2
Totals for 13 centres . . .	19	171	403	113	199	65	970
15. Varanasi . . .	1	56	78	143	75	6	359
16. Surat . . .	Data for number of days worked have not been collected.						
GRAND TOTAL . . .	20	227	481	256	274	71	1,329

TABLE NO. 4
Type of employment by centres

Centres	Type of employment		
	Family	Hired	Total
1. Delhi	428	695	1,123
2. Agra	659	134	793
3. Bareilly	107	490	597
4. Lucknow	60	184	244
5. Ajmer	259	312	571
6. Jaipur	250	1,354	1,604
7. Bhopal	118	215	333
8. Bombay	50	145	195
9. Patna	43	149	192
10. Hyderabad	99	210	
11. Paithan	82	5	8
12. Bangalore . . . . .	..	99	99
13. Madras	7	26	33
14. Tiruchi	10	1	11
Total for 14 centres	2,172	4,019	6,191
15. Varanasi	749	1,191	1,940
16. Surat	3,045	264	3,309
GRAND TOTAL	5,966	5,474	11,440

TABLE NO. 5
Sexwise employment by centres

Centre	Sex			
	Males	Females	Children	Total
1	2	3	4	5
1. Delhi	840	267	16	1,123
2. Agra	207	578	8	793
3. Bareilly	479	..	118	597
4. Lucknow	195	28	21	244
5. Ajmer	400	143	28	571
6. Jaipur	458	1,004	142	1,604
✓ 7. Bhopal	71	260	2	333
8. Bombay	192	3	..	195
9. Patna	105	85	2	192
10. Hyderabad	236	52	21	309
11. Paithan	41	42	4	87
12. Bangalore	98	1	..	99
13. Madras	33	..	..	33
14. Tiruchi	9	2	..	11
Total for 14 centres				
	3,364	2,465	362	6,191
15. Varanasi	1,660	201	79	1,940
16. Surat	880	2,055	374	3,309
GRAND TOTAL				
	5,904	4,721	815	11,440

TABLE NO. 6
Capital Employed in various centres

(Rupees in lacs)

Centres	Nature of Capital		
	Fixed Capital	Working Capital	Total
1	2	3	4
1. Delhi	5.31	4.35	9.66
2. Ajmer	0.17	0.53	0.70
3. Bareilly	0.08	0.13	0.21
4. Lucknow	0.08	0.09	0.17
5. Ajmer	3.24	7.79	11.03
6. Jaipur	1.61	4.20	5.81
7. Bhopal	0.08	0.52	0.60
8. Bombay	0.59	0.14	0.73
9. Patna	0.03	0.13	0.16
10. Hyderabad	0.10	0.21	0.31
11. Paithan	0.07	0.02	0.09
12. Bangalore	5.17	4.21	9.38
13. Madras	0.13	0.24	0.37
14. Tiruchi	0.12	0.02	0.14
Total for 14 Centres			39.36
15. Varanasi	4.20	6.88	11.08
16. Surat	2.46*	1.28	3.74
GRAND TOTAL			54.18

*Excludes value of land & buildings.