ECONOMICS OF INDIAN CRAFT

Estimating Employment and Value Added in the Handicraft and Handloom Sector

SUMMARY OF FINDINGS

INSTITUTE FOR HUMAN DEVELOPMENT
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CRAFTS COUNCIL OF INDIA

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2026

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Summary of Findings

Handmade crafts in India represent a heritage of excellence spanning thousands of years. Of the 17 UN Sustainable Development Goals, 11 goals are directly related to the handicraft sector. Through the ages, a wide variety of handicraft and handloom products manufactured by our artisans have been witnesses to the country's rich cultural heritage and traditions.

Official data on this sector is limited. A modest attempt was made in the Sixth Economic Census (EC: 2013-14), in which each manufacturing unit was asked whether it was engaged in handloom or handicraft activities. The inclusion of this item facilitated obtaining an idea of the number of establishments engaged in the sector and the number of workers employed by them.

In view of these limitations, the Institute for Human Development (IHD) in collaboration with the Crafts Council of India conducted this survey. The objectives of the study included:

- To have an independent estimate of the number of units and persons engaged separately in the sector;
- To assess the contribution of the sector in value added, and
- To suggest a methodology for future integration of the handmade sector into national systems of accounting

The Geographical Coverage of the Primary Survey and Sample Size

The primary survey was conducted in five States of Assam, Rajasthan, Tamil Nadu, Uttar Pradesh and West Bengal. The States were selected to ensure geographical representation across the country as well as the relative importance of the States in terms of number of handloom and handicraft (HH) units as per the sixth EC. The survey was conducted in both rural and urban areas of each State. For this purpose, a representative sample of 3 districts was selected from each State. From each selected district, a representative sample of 20 villages and 20 census enumeration blocks (CEBs) was chosen. Finally, from each selected village/CEB, a maximum of 10 HH units was selected for detailed enquiry. The above procedure finally led to the selection of 300 villages with 2,503 HH units from the rural areas and 300 CEBs with 2,156 HH units from the urban areas, considering all five States taken together.

The Concepts of HH Unit / Establishment and Worker Adopted in the Survey

The handloom industry is characterized by manual weaving techniques, often using traditional looms operated by skilled artisans. Similarly, the handicraft activity was linked to the manufacture of products produced either completely by hand or with the help of tools, which are artistic and aesthetic in nature. It is important to mention that only the manufacturing component of the HH activity was covered in the survey. In other words, only the persons / units engaged in manufacturing the handloom or handicraft products were covered in the survey excluding thereby the units which were exclusively engaged in the trading i.e. purchase and sale of handloom/handicraft products. A HH unit or establishment was defined as the undertaking which was engaged in the manufacturing of handloom or handicraft product(s) mainly for the purpose of sale. While counting the workers of the HH establishments, all the workers, both hired and not-hired, including the owners of the establishment and other unpaid family members of the owners were taken into consideration. The persons who were not directly engaged with the manufacturing activity as such but were associated with other allied activities of the establishment like purchase of raw materials, disposal of products, maintenance of accounts, and so on were also treated as workers of the establishment.

Period of Fieldwork

In the States of Assam, Rajasthan and West Bengal, the primary survey was conducted from December, 2023 to March, 2024. Thereafter, the fieldwork was carried out during June – August, 2024, in Tamil Nadu, and finally during November, 2024 to February, 2025, in the State of Uttar Pradesh.

Estimated Size of the Sector

Based on the sample data collected from 3 districts of each State, estimates were derived of the size of the HH sector in terms of number of establishments as well as number of workers for each State as a whole (i.e. all the districts within the State), apart from the estimates for the selected districts with a break-up for rural and urban areas. Some key estimates are as follows:

- Total number of establishments (5 States combined): 34 lakh
- Estimated total employment (5 States combined): 61 lakh
- Crude all-India estimate of total number of establishments: 65 lakh
- Crude all-India estimate of total number of persons engaged in the sector: 113 lakh

Among the 34 lakh units across the five States, handloom and handicraft units were roughly equal in number (handloom: 17.8 lakh units; handicraft: 16.1 lakh units). In terms of employment, out of 61 lakh persons, about 29.4 lakh persons were engaged in the handloom sector and 31.7 lakh persons in the handicraft sector

In terms of total number of HH units, the rural areas had a little higher share (18.7 lakh units) than the urban areas (15.2 lakh units). However, the corresponding proportions varied across the States. In terms of total number of HH units, Uttar Pradesh ranked first (12.5 lakh units) followed by the States of Rajasthan (8.5 lakh), West Bengal (7.4 lakh), Tamil Nadu (3.3 lakh) and Assam (2.2 lakh units). The relative rankings of the States remained same in respect of number of workers also with the State of Uttar Pradesh employing about 22 lakh persons and Assam engaging 4.9 lakh persons in the sector. The estimated number of workers in the other three States was 15.5 lakh, 12 lakh, and 6.7 lakh in Rajasthan, West Bengal, and Tamil Nadu, respectively.

Relative Importance of the Sector within the Manufacturing Industry

When compared with the estimate based on the Annual Survey of Unincorporated Sector Enterprises (ASUSE): 2023-24, nearly 42% of the manufacturing establishments or roughly every 4 out of 10 manufacturing establishments in the five States can be considered as engaged in HH activity.

A comparison of the number of workers in the HH sector as per the primary survey with the number of workers in the manufacturing sector based on the Periodic Labour Force Survey (PLFS): 2023-24 reveals that about 26% of all the workers engaged in the manufacturing industry were working in the HH sector, considering all five States together. In other words, 1 in 4 workers in the manufacturing industry was employed in the HH sector. This proportion is higher for Rajasthan (43.8%), Uttar Pradesh (35.4%) and Assam (33.8%) but relatively low in respect of West Bengal (16.3%) and Tamil Nadu (13.0%).

Thus, from the above comparison, it can be concluded that the HH sector is certainly an important segment within the manufacturing industry.

Some Key Characteristics of the Establishments

- A majority of the HH establishments worked with either 1 worker (56.6%) or 2 workers (28.2%). The proportion of establishments employing more than 5 workers was about 2.6% (2% working with 6 to 9 workers and 0.6% engaging 10 or more workers).

- A large proportion of establishments, nearly cent percent, were found to be 'proprietary' in nature across all the five States.

- As regards the female ownership among the proprietary and partnership units is concerned, a large proportion of handloom establishments were owned by females in all the States [Rajasthan (94.5%), Uttar Pradesh (78.2%), Assam (68.8%) and West Bengal (47.9%)] except Tamil Nadu. In the handicraft establishments too, the female ownership was quite significant in Uttar Pradesh (65.1%), West Bengal (49.5%) and Assam (44%).

- A vast majority of the establishments in each State were perennial in nature i.e. found to be working almost throughout the year. However, the seasonal establishments had a significant share (20%) in the State of Assam.

- The establishments operating from within the household premises outnumbered the other type of establishments (Uttar Pradesh: 97%; Assam & West Bengal: nearly 90%; and Rajasthan: 72%). Tamil Nadu stands out as an exception where relatively a lower proportion (58%) of the establishments were functioning within the household premises.

- A significant proportion of handloom establishments remain unregistered under any formal scheme or programme. Further, a very low proportion of HH establishments-maintained accounts with the State of West Bengal reporting the highest proportion (3.8%) of such establishments and Uttar Pradesh reporting the lowest proportion (0.1%). Majority of the establishments reported that their workers were trained through traditional, inherited, and caste-based knowledge passed down through generations.

- A high proportion of owners of HH units under the proprietary and partnerships have low educational level. About two-thirds of the owners in Uttar Pradesh have education of primary or below followed by West Bengal and Rajasthan (around 60%). Only about 7% of the owners in each of Rajasthan, Uttar Pradesh and West Bengal; 10% in Assam; and 13% of the owners in Tamil Nadu have completed higher secondary and higher level of education. The situation is not very different in the technical education as well. Most of the States show the lack of formal technical education among the owners. However, indigenous/inherited knowledge is found to be the major source of skill among the owners of the establishments in the States of Rajasthan (93%), Uttar Pradesh (41%), Tamil Nadu (37%) and Assam (36%) except West Bengal (only 1%)

Details about Workers

- Among 61 lakh workers engaged in the HH sector, the proportion of hired workers was relatively low in each State. The proportion was the lowest (5.2%) in Uttar Pradesh and highest (37.4%) in the State of Assam. The proportion of hired workers is generally higher in urban areas compared to rural areas.

- A substantial proportion of workers were women. Uttar Pradesh topped among the five States with as high as 71.6% of the workers being the females. The other two States with more than half of the workers being females were Rajasthan (62%) and Assam (57.4%). The lowest female participation was observed in Tamil Nadu (32.5%). In the State of West Bengal, about 47.8% of the workers were females.

- The majority of establishments reported that their workers were trained through traditional and inherited knowledge. A significant proportion of establishments in Assam (91.1%), Tamil Nadu (89.9%), and Rajasthan (85.6%) indicated that their workers acquired skills primarily through this traditional knowledge system. The overall proportion of formally trained artisans and weavers remains low.

Major Types of Products Manufactured

Types of products manufactured by the HH establishments varied across the States (see the box below).

Box 1: Major Products by the Handloom and Handicraft Units in the States

State	Major Products Manufactured (Proportion of Establishments)
Handloom Units	
Assam	Mekhela chadar/saree (53.4%); Towel/Dhoti (30.9%); Weaving/spinning (4.7%); Silk /plastic chadar (3.3%); Cotton bedsheets (3.2%)
Rajasthan	Bandhej work (85.2%); Attaching gotta patti on Saree (4.2%); Carpet (2.5%)
West Bengal	Zari work (64.5%); Saree (26.8%); Woollen products (1.8%); Gamocha/dhoti (1.6%)
Tamil Nadu	Saree (81.1%); Gamocha/dhoti (9.3%); Embroidery work (3.7%); Floor or door mat (1.7%); Carpet (1.7%)
Uttar Pradesh	Embroidery work (44.9%); Other handloom products (11.7%); Zari work (11.2%); Saree (10.8%); Carpet (6.7%); Thread (6.0%)
Handicraft Units	
Assam	Bamboo and cane products (67.8%); Wood products (18.4%); Clay products (5.1%); Metal products (2.7%)
Rajasthan	Wood products (28.2%); Clay products (20.5%); Metal products (18.0%); Shoe (10.7%); Idol (5.7%); Fitting stones on bangles (4.5%); Lac bangles (4.3%)
West Bengal	Paper products (30.8%); Rakhi (15.8%); Metal products (11.4%); Idol (11.0%); Wood products (10.8%); Bamboo and cane products (8.2%); Clay products (6.8%)
Tamil Nadu	Leaf plate making (25.6%); Metal products (17.8%); Wire products (15.9%); Wood products (14.0%); Bamboo and cane products (7.1%): Clay products (6.2%)
Uttar Pradesh	Beads garland/bracelet (47.7%); Shoe (15.3%); Wood products (9.8%); Clay products (7.6%); Metal products (6.7%); Decorative items (3.1%); Fitting stones on bangles (2.9%)

Sources of Procurement of Raw Materials and Disposal of Products

Among various types of sources of raw materials namely ‘open market’, ‘master weaver/ contractor input supplier’, ‘import’, ‘co-operative society’, ‘National Handloom Development Corporation Limited/ State Handloom Development Corporation Limited’ and ‘KVIC/ KVIB’, about 99% of the HH establishments depended on the first two sources to access the raw materials.

Among the handloom units, in terms of total value of purchase of raw materials during the last 365 days, open market was found to be the most dominant source of raw material in Assam with more than 80 per cent of the units accessing most of the raw material(s) from this source. However, in the remaining States the most dominant source was ‘master weaver/ contractor / input supplier’ (Rajasthan: 92.1 per cent, Uttar Pradesh: 97.2 per cent, West Bengal (72.6 per cent) and Tamil Nadu: 61.9 per cent).

So far as handicraft units are concerned, master weaver/contractor/input supplier is the most dominant source of supplier of raw material in Uttar Pradesh (77.8%) as against the open market in the remaining states (Assam: 91.2%, Tamil Nadu: 85.8%, Rajasthan: 74.5% and West Bengal: 72.0%).

The situation on disposal of products broadly remains similar with local market, master weaver/ contractor/ input supplier, and cooperative society (for handloom units only) accounting for the major sources of disposal of products by the HH establishments. The incidence of export of products was encountered only in certain cases namely 0.1% of the handloom units in each of the districts of Jaipur and Bareilly; 0.3% of the handicraft units of Jaipur district; and 4.4% of the handicraft units in the district of Salem.

A small percentage of establishments reported the disposal of products through organised fairs/

exhibitions/haats/stalls. This percentage was as follows: Handloom units – Assam (5.6%), Tamil Nadu (0.2%), Uttar Pradesh (0.2%) and West Bengal (0.3%); Handicraft units – Assam (9.4%), Rajasthan (0.3%), Tamil Nadu (0.8%), Uttar Pradesh (0.3%) and West Bengal (0.7%).

Problems Encountered, Incidence of Outstanding Loan and Health Hazards

Lack of market access and financial constraints (e.g. difficulty to get loan) was reported by the majority (more than 50%) of the HH establishments in each State, except Uttar Pradesh, where the percentage is a little lower (36%) with respect of financial difficulties. Input-related problem, i.e. either price or availability, was another major issue reported by at least 40% of the establishments in each State. Some of the other major problems faced by a large proportion of establishments included competition from mass production (factory/imports), lack of space, and lack of skilled workers. Competition from copying was also faced by a significant proportion of establishments (Rajasthan: 23.4%, Assam: 12.1%).

More than 10% of the HH establishments in Tamil Nadu (12.1%) and West Bengal (10.9%) reported an outstanding loan at the time of survey. This proportion was lower in other States: Assam (5.3%), Rajasthan (2.1%) and Uttar Pradesh (0.2%).

The State of Uttar Pradesh had the highest proportion (45%) of HH establishments reporting the incidence of occupational health risks followed by West Bengal (23.2%), Tamil Nadu (17%), Assam (15.4%) and Rajasthan (3.7%). Across most States, handicraft establishments reported higher occupational health risks than the handloom units. Occupational health and social security needs have emerged as priority concerns which need to be addressed if talent is to be retained and to attract younger generations to the sector.

Current Status of the Establishments

The survey ascertained the current status of the HH establishments over the last 10 years as well as in comparison with the pre-COVID period. With respect to both periods, the proportion of establishments in the States reporting a decline in the current scale of production is generally much higher than the proportion of units reporting a growth (box below).

Box 2: Current Status of the Handloom and Handicraft Establishments

State	Proportion of Establishments			
	Status over the last 10 years		Current status as compared to pre-COVID period	
	Grown	Declined	Grown	Declined
	Handloom Units			
Assam	12.9	50.4	11.5	55.1
Rajasthan	32.1	30.0	15.9	17.4
West Bengal	32.6	48.0	39.9	44.5
Tamil Nadu	2.1	66.3	2.1	65.2
Uttar Pradesh	8.1	51.4	20.9	31.8
	Handicraft Units			
Assam	21.5	53.7	13.5	57.3
Rajasthan	24.8	24.7	4.3	27.8
West Bengal	17.4	36.3	24.8	33.0
Tamil Nadu	8.5	27.6	7.8	28.4
Uttar Pradesh	7.3	38.2	28.5	28.1

Thus, broadly speaking, in each State, the majority of the HH establishments reported either a stagnation or a decline in the scale of production over the past ten-year period as well as in relation to the pre-COVID situation. The prevalence of growth over the ten-year period is very low (at less than 10% of the units) in Tamil Nadu and Uttar Pradesh.

Contribution to Gross Value Added (GVA) and GVA per Establishment / Worker

Gross value added (GVA) is the primary component of the country's GDP (gross domestic product). Aggregate GVA for the country is the sum of GVA of all the establishments. Conceptually, GVA by a particular establishment is the sum total of compensation to workers, income earned by the establishment, and amounts payable on rent on land and interest on loan if any.

From the box below, it may be seen that the HH establishments of five States together contributed about Rs. 51,445 crore of annual GVA with the reference year being the last accounting year (prior to the date of survey) for establishments maintaining accounts and last 365 days for those not maintaining accounts. The percentage share of HH sector in respect of GVA in relation to the overall Gross State Value Added (GSVA) by the manufacturing sector for the year 2023-24 works out to be 9.6% for Assam, 9.9% for Rajasthan, 0.9% for Tamil Nadu, 3.6% for the State of Uttar Pradesh and 6.8% for West Bengal.

In terms of annual GVA per worker, the average for five States was about Rs. 84,000/- with West Bengal reporting the highest figure (Rs. 1.25 lakh and the State of Uttar Pradesh had the lowest average (Rs. 44,000/- per worker). In terms of the monthly average, it comes to about Rs. 7,000/- per month considering all the five States or about Rs. 270/- per day on an average (assuming that one works for 26 days in a month with 4 days of rest) which falls well below the prescribed daily minimum wage.

Policy Implications

The handloom and handicraft sector in India not only embodies the country's rich cultural heritage, but the sector also serves as a vital source of livelihood for millions of workers, particularly those from vulnerable and marginalised communities.

An overwhelmingly significant proportion of women are engaged in this sector to meet their household expenses. Despite its importance as a source of livelihood, the sector faces numerous challenges, including low income of workers, limited access to markets and various obstacles the establishments face in day-to-day operations.

Given the findings in this survey of low use of government support schemes, there is an apparent need for generating awareness and integration of various schemes initiated by different ministries, such as MSME, Textiles, and Culture. In this context, strengthening Weaver Service Centres,

Box 3: Estimated Annual Aggregate and GVA , GVA per HH Unit and GVA per Worker by Handloom and Handicraft Units

State	Estimated Annual GVA (Rs Lakh)	Annual GVA per HH Establishment (Rs)	Annual GVA per Worker (Rs)
Assam	572721	259,571	116,417
Rajasthan	1681608	197,806	108,361
West Bengal	1502238	202,456	125,010
Tamil Nadu	415997	127,400	62,519
Uttar Pradesh	971951	77,844	44,210
All	5144515	151,850	84,207

handicraft and handloom clusters, cooperatives, and self-help groups (SHGs) appears crucial. The study highlights that many artisans continue to use only traditional techniques, which often limits the market value of their products. To address this, continuous up-skilling through training in modern design and eco-friendly production techniques is necessary. Expanding market access for artisan products, both nationally and internationally, is also vital. This can be achieved through e-commerce platforms, exhibitions, and buyer seller meets. Further, reducing the administrative hurdles to access financial support and insurance is essential for the sector's growth.

There is also an urgent need to create and implement schemes in order to improve access to raw materials, finance, and social security given the fact that the handloom and handicraft sector is a crucial source of livelihood for millions, particularly women as well as other vulnerable and marginalized communities.

Over the past decade, the sector has demonstrated resilience in withstanding various crises due to the impact of COVID-19, demonetization, GST issues, and market fluctuations. However, the proportion of establishments with decline in the scale of production in relation to the position ten years before as well as in comparison with the pre-COVID period has been substantially high. Urgent policy measures are necessary to address this problem.

Given the survey findings that a very large proportion of establishments access raw materials from and supply the finished products to master weavers / contractors / input suppliers, it will go a long way if steps are taken to strengthen the status of master craftspersons as key trainers, mentors, and knowledge holders with technology and design institutions supporting their role.

Linking youth with artisan activities through entrepreneurship schools and through higher education systems can also ensure the sector's sustainability. As revealed by the study, many establishment owners lack awareness of government support schemes. This is an issue which may be overcome through stronger partnerships between authorities and civil society for accelerated awareness drives and local monitoring. The issue of less participation by artisans in fairs, exhibitions, haats etc. also needs to be addressed by increasing awareness among artisans through publicity and support measures. Enhancing social security is also vital to retain and attract talent in the sector, requiring partnerships with other sectors to develop schemes for health, pensions, and overall well-being.

Need for Further Surveys

In view of resource constraints, this study was confined to five states with limitations on sample size. However, the study has revealed many insights about the functioning of the sector including its scale of operation and the challenges it faces. For a much more comprehensive picture about the sector and in the efforts towards developing a methodology for future integration of the handmade sector into national systems of accounting as highlighted in the report of the EC 2013-2014, it will be desirable to replicate the present study covering more states and moving towards a pan-India survey. In this venture, regular interaction with the concerned ministries like the MoSPI, MoT (including with the Development Commissioners of Handloom and Handicraft) and MSME as well as various other stakeholders like Industry Associations will be invaluable so as to develop partnerships for a comprehensive database of the HH sector.

The comprehensive state and national level surveys on handicraft and handloom establishments would help identify gaps in infrastructure, skill development, market access, and technology adoption. They would also provide evidence for designing targeted policies, financial support, and welfare schemes to strengthen artisans' livelihoods. Regular surveys can further track changes over time, enabling both state and national governments to frame strategies that promote sustainable growth and global competitiveness of the sector.

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The Crafts Council of India (CCI) was founded in 1964 by Kamaladevi Chattopadhyay as a pioneering effort toward protecting and enhancing India's heritage of crafts in its transition to modernity. CCI works to support the knowledge and skills of India's artisans, and to help address their needs within a rapidly changing environment. The Council works in partnership with the Government of India and other activists to ensure a national awareness of the economic, social, cultural and environmental importance of artisans and their crafts. Registered as a not-for-profit society, CCI is headquartered in Chennai, Tamil Nadu. Regional and local efforts are encouraged through a network of 11 State councils and sector partners.

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