

ANALYSIS OF PROSPECTS AND SCOPE OF JUTE INDUSTRY IN INDIA AND BANGLADESH**Satya Narayan Bag¹,****Principal, GobindapurSephali Memorial Polytechnic, Guskara, Burdwan, West Bengal,INDIA**

Abstract :*Bangladesh is popular for Jute industry. The country produced 41.94 % of World Raw jute production, whereas India is the leading country for Raw Jute production. India produced 55.23 % of World Raw Jute production. Both India and Bangladesh exhibited increasing trend in Raw Jute production. Bangladesh Jute cultivation land area has been increasing by 81.5 % from the year 2006 to 2012. India exhibited constant for Jute cultivated land area. Productivity (tonne/hectare) of Raw Jute is higher in India than Bangladesh. In the year 2012 Indian Raw Jute productivity was 2.39 tonne/hectare , whereas Bangladesh reported 1.91 tonne/hectare. China exhibited increasing trend of raw Jute productivity. China reported 3.21 tonne /hectare in 2012 which was much higher than India and Bangladesh on the same year. 4 % share of Jute sector in overall GDP in Bangladesh. Both India and Bangladesh exhibited increasing trend in Jute goods production. Jute yarn exports of Bangladesh has been increasing by 24.8 % in 2012 than 2007 and its share was 86.17 % (2012) to the global Jute Yarn exports. Due to MSP support by JCI , Indian Jute growers faced less loss than Bangladesh Jute Growers.*

Key Words : Export, Global, Jute Industry, Jute goods, MSP, Productivity.

INTRODUCTION

Jute is a major cash crop for over three million small farm households in Bangladesh. Jute industry is the largest industry, producing about one-third of manufacturing output, and the largest agricultural export commodity in Bangladesh. The livelihood of many people in Bangladesh is dependent on jute related activities in agriculture, domestic marketing, manufacturing and trade. The contribution of jute sector to economy of Bangladesh is enormous. This sector has been generating employment to a large segment of total population of the country, directly and indirectly over the years. Bangladesh produces 55-60 lakhs bales of raw jute every year. 160000 employees of the country are directly employed in the jute mills. The strength of Bangladesh Jute industry is that it is based on the raw material that is available at the door step. The quality of the raw material is the best available in the world. Bangladesh is the pioneer country of jute cultivation due to its climatic situation, soil condition and rain and river water. The Jute industry in Bangladesh is primarily export oriented. Raw fibre is exported along with Jute manufactured goods. Jute manufacturing is a very labor-intensive activity compared to other manufacturing activities and thus it has special importance in terms of employment creation . The country earns a significant amount of foreign currencies by exporting Jute and Jute goods every year. It is necessary to provide equal treatment to the Jute products like the agro products to keep the existing employment of the sector intact. Presently , there are 249 Jute Mills in the country. Export from the sector amounted to US \$ 824 million in FY'14 market , the Export promotion Bureau data showed.

A BRIEF LITERATURE REVIEW

Md .Uddan Jamal¹ (2014) et al, concluded in their research paper that, Jute is a vital sector from economical, agricultural, industrial, and commercial point of view in Bangladesh. Once upon a time jute was called the 'Golden Fibre' of Bangladesh. But due to continuous loss every year, the present and future prosperity and growth of this industry is in a vulnerable condition. There are different causes behind this situation. This sector has a good potential to earn a lot of foreign currencies for Bangladesh. Because at present, people are very cautious about environment and jute is an environment friendly product. For this a good number of researches are needed in this area. From this research, the policy maker will get some idea about how to improve this sector. The aim of this paper is to highlight the present scenario of jute industry in Bangladesh and give some recommendations to improve this sector.

Malla M M U² (June 2014) , et al , explained in their research paper that the study was designed to examine the financial performance of traditional jute products manufacturing industry in Bangladesh. Both primary and secondary data were collected from the public and private sector jute industry during the study period. Primary data were collected from the key informant of the respective institutions. The study found that the public sector suffered more losses during the study period. The manufacturing cost of the public sector jute manufacturing industry was substantially higher compared to private sector for all kinds of products. Therefore, per unit labour cost was substantially higher in the public sector jute manufacturing industry compared to the private sector, which was almost double in the cases of all products. The public sector sold most of their products through local buying houses (exporters). Estimated gross profit per unit output for the public sector jute manufacturing industry was higher than the private sector. However, the mills under Bangladesh Jute Spinners Association obtained higher level of profit from their specialized products (yarn/twine).

Md Islam S³, (January 2012) et al, disclosed in their research paper that the worldwide awareness on environment is the reason for the opportunities of Jute, due to environment-friendly characteristics. The research aim is to analysis the comparative development and growth of jute production of Bangladesh with other major jute producing countries to avail the opportunity of jute's growing demand in the world market. It is taken the data of Production, Area, and Yield of Jute for 19 years from the year 1991-92 to 2009-10 of Major Jute producing countries such as India, Bangladesh, China, Myanmar, Nepal, and Thailand for analysis. The study has used percentage, mean, growth, and hypothesis test etc. for analysis of data and drawing inferences. This scenario tells that world jute production and area of production are decreasing with fluctuating trend. Bangladesh is in second position in relation with total production, area and yield in the world. The total production of Jute and yield are increasing with fluctuating trend. The area of jute production of Bangladesh is slightly decreasing with fluctuating trend. The recommended issues are to use the scientific method of cultivation, to make available of market information, to develop the diversified products, to implement the law for using jute rather synthetic, to make jute policy etc. for development of jute production.

Akter R⁴ (April- June 2015) disclosed in her research paper that the production of diversified jute goods in Bangladesh has got a momentum because of environmental awareness and rise of green business among consumers in worldwide. Bangladesh's traditional jute goods production shifted to more value added products. But the country is failed to diversify its market base compare to increasing demand in worldwide. This research aim to explore a new market for Bangladeshi jute items. Australian market is researched and examined in this regards. To get a full idea about the market, the competitive factors in

Australian market including industry analysis is done. This research also suggests some recommendation for the exporters.

Rahman M M⁵ (2009) disclosed in his research study that Bangladesh being one of the leading jute producers of the world enjoyed the monopoly in marketing of jute and jute goods in the world market till mid-seventies. Bangladesh produces 5.0-5.5 million bales of raw jute annually out of which 2-2.5 million bales are exported and the rest are consumed by the local jute mills. About 70-75% of the total jute goods produced in the country is exported. Bangladesh still meets 50-60% of the world's demand of jute goods and 90% of raw jute. More than 150 composite and twine jute mills in public and private sector of Bangladesh are producing more than 6.5 lac MT traditional along with various diversified jute products and twines/yarns. Government of Bangladesh is trying to rejuvenate the jute sector through various activities and policy decisions. Introduction of High Yielding Variety (HYV) jute seed, popularizing the use of modern agricultural practices, encouraging cultivation of good quality fibre, promotion of jute diversified products (JDs) etc. are the major areas of intervention of the Government of Bangladesh. A huge demand for various diversified jute products viz. carry/shopping bags, shoes, composite materials, geo-textiles, home textiles, handicrafts, gift items, pulp and paper etc. is continuously increasing in both local and foreign markets. The future prospect of this eco-friendly natural fibre-jute is expected to increase day by day with effective support from the national governments of the producing countries through adoption of appropriate policies like banning of synthetic packaging materials and enactment of regulations favorable towards its cultivation, diversification and marketing.

De Prabir⁶, et al, (Sept 2007) explained in their research findings that, South Asia has received growing attention as a region that is integrating successfully into the global economy. To maximize the benefits in terms of faster growth and poverty reduction, the region will need to strengthen regional and bilateral cooperation in several areas. In this context, closer bilateral cooperation and integration between major South Asian countries, such as between India and Bangladesh, will strengthen the South Asian Association for Regional Cooperation (SAARC) and help ensure the effectiveness and efficiency of their activities. Cultural, trade, and economic exchanges between the two countries are long standing. India and Bangladesh boast of a total population of more than 1 billion, and their rapid domestic economic development and good cooperation have demonstrated broad prospects for further cooperation. A remarkable growth in two-way trade between India and Bangladesh has resulted in robust growth of the economies in the region. India has become Bangladesh's largest trading partner in South Asia. Compared with their strength, much potential exists for developing trade and economic relations between the two countries. This paper discusses various opportunities and associated prospects and problems in strengthening the India-Bangladesh economic cooperation and integration agenda in the context of SAARC.

RESEARCH METHODOLOGY ;

The present study is theoretical in nature. The scope of the study extends to the Jute sector of Bangladesh as well as India. The major motive behind the present study is the eminent prospects of Bangladesh and Indian Jute industry in contributing towards the economic development of the nation as a whole. The data for the present study has been collected from secondary sources. The data analysis has been through secondary review and content analysis has been performed to arrive at conclusions and discussion. The secondary sources of the data includes books, journals published

research work, various search engines etc. The up to date quantitative data has been collected from the official websites of Indian Jute Manufacturing Association, International Jute study group, Jute corporation of India and Bangladesh etc

RESULTS AND DISCUSSION

From Table 01 and Figure 01 and 02 it is observed that quantity of jute production (tonne) over different years, India is the largest producer of Raw Jute. In the year 2012, 55.23 % of total Raw Jute production of world had produced in India. Bangladesh occupied in 2nd position in Raw Jute production. In the year 2012, Bangladesh produced 41.04 % of the total Raw jute production in the world. So, India and Bangladesh are the major Raw Jute production countries in the world. Other countries are China, Nepal, Myanmar, Thailand. It is observed that, World Raw Jute production are increasing trend from 2008 to 2012.

Table : 01 Quantity of Jute production (tonne) Over Different Years :

Year	2006	2007	2008	2009	2010	2011	2012
World	2876460	2823671	2691315	3045089	2828533	3583235	3461964
India	1857000 (64.69%)	1840000 (65.16%)	1425000 (64.43%)	1608500 (66.39%)	1349100 (63.61%)	1324800 (54.71%)	1712000 (55.23%)
Bangladesh	884000 (30.8%)	838682 (29.7%)	841733 (31.54%)	961939 (30.33%)	956751 (32.65%)	808600 (42.51%)	1452044 (41.94%)
China	48567 (1.69%)	55500 (1.97%)	400000 (1.75%)	282000 (1.43%)	340000 (1.41%)	369000 (1.21%)	45000 (1.3%)

Source : <http://faostat.fao.org/site>

Figure in bracket indicates % of Jute production of different countries to the global production

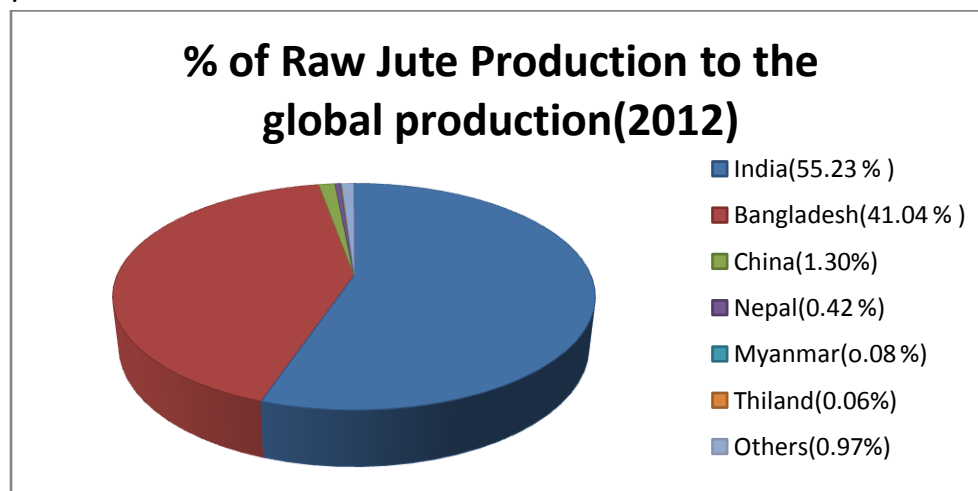


Figure 01 : % of Jute Production of Different countries to the Global Production

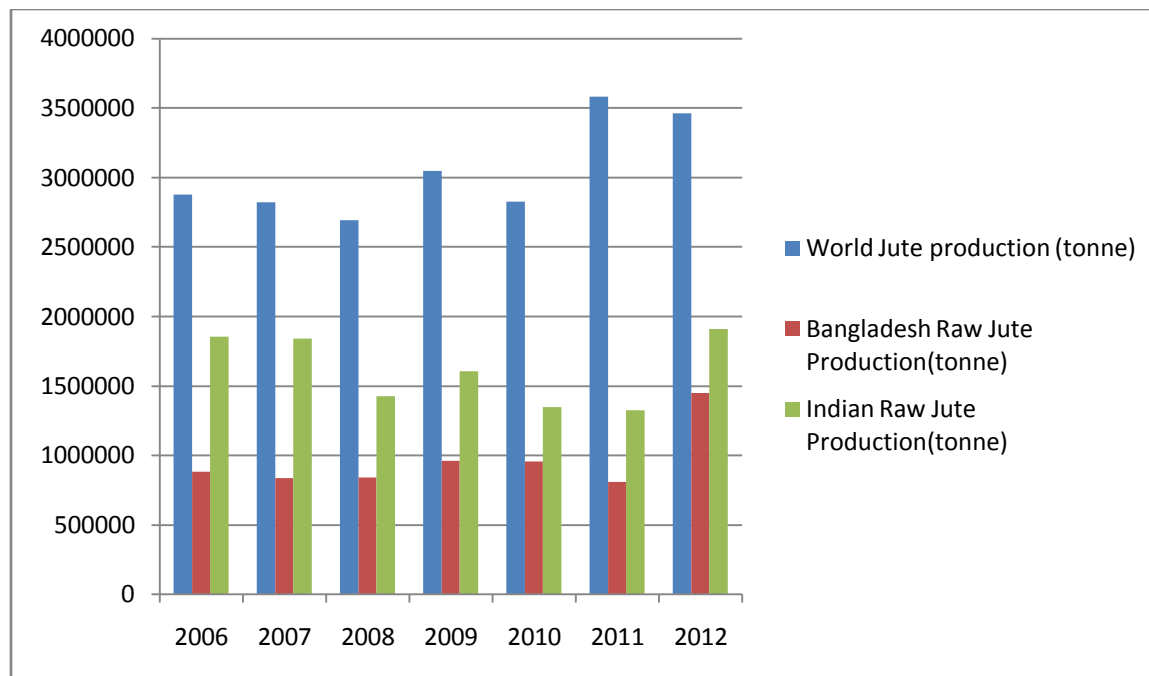


Figure 02 :comparative analysis of Raw Jute Production Between Bangladesh and India (tonne)

Figure 02, exhibited that both India and Bangladesh exhibited increasing trend of Raw Jute production in the year 2011 & 2012. The reasons behind this is that 3rd world countries are very much concerned about environment protection. To protect the environment, Jute fibre is the major substitute of the cheap synthetic fibres which causes environmental pollution. Due to biodegradable nature of the fibre, Jute has used not only as packaging material but also upholstery, Garments, floor coverings, Geotextiles and Composites.

Table 02 explained the contribution of Jute production over the total agricultural production of India and Bangladesh in different years. Bangladesh has high contribution of such ratio than Indian country over different financial years. In the year 2012, Raw Jute production to total agricultural production has increased from 0.18 % to 0.46 % in the year 2012, whereas Bangladesh exhibited increasing contribution of 1.98 % to 3.59 % in the year 2012.

Table 02 : % of jute Production to the total Agricultural Production of Different Countries Over Different Years :

Country	2006	2007	2008	2009	2010	2011	2012
India	0.21%	0.18%	0.17 %	0.22 %	0.18 %	0.18 %	0.46 %
Bangladesh	1.42 %	1.28 %	1.21 %	1.31 %	1.23 %	1.98 %	3.59 %
Nepal	0.10 %	0.10 %	0.10 %	0.10 %	0.11%	0.07%	0.13%

Source :<http://faostat.fao.org/site>

The contribution of Raw Jute production to total agricultural production is due to the soil condition, high rainfall, large number of rivers, people are more interested in agricultural production, whereas India is

a large country . Here lot of agriculture products are produced . So, percentage of contribution of Raw Jute production to agriculture production is much less compare to Bangladesh.

Table 03 indicates that Jute cultivation area in hectares were increasing trend from 2006 to 2012 in Bangladesh, whereas India exhibited more or less constant over different years from 2006 to 2012 in % of Jute cultivation area to total Agricultural area. Bangladesh is a Jute producing country . Agriculture is the major sector for economic development sector of Bangladesh. Due to better soil condition ,availability of river water, high rain falls, cheap labors, country is more concentrated on Agricultural development. Jute is a major cash crop to Bangladesh. Year after year Jute products are exported to foreign countries

Table 03 : Area Under Jute Cultivation (In Hectares) Over Different Years:

Country	2006	2007	2008	2009	2010	2011	2012
India	791000 (0.44%)	816000 (0.45%)	785600 (0.44%)	811200 (0.45%)	767630 (0.43%)	980000 (0.55%)	800000 (0.44%)
Bangladesh	419000 (4.52%)	440492 (4.75%)	420473 (4.54%)	416000 (4.50%)	416346 (4.51%)	708723 (7.76%)	760427 (8.33%)
Nepal	11975 (0.28%)	11726 (0.04%)	11590 (0.04%)	11678 (0.27%)	13103 (0.05%)	10559 (0.04%)	10540 (0.04%)

Source: <http://faostat.fao.org>.

Percentage indicates area under Jute cultivation to the total agricultural area of different countries.

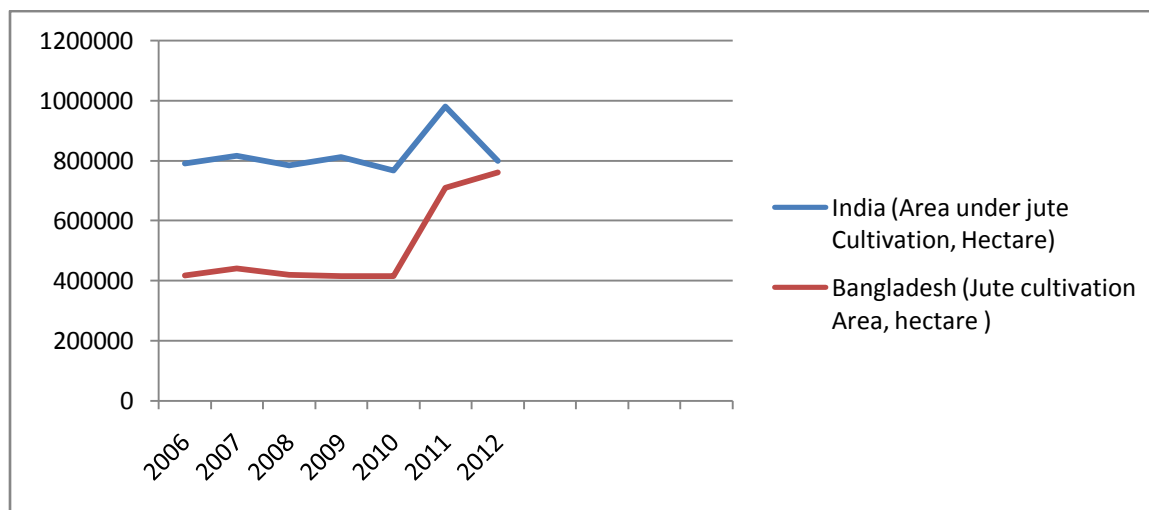


Figure 03 : comparative analysis area under Jute cultivation (Hectare) Line Diagram(Y axis Indicates area hectare of jute production)

. Jute products earn foreign currencies. Govt. of Bangladesh is more concentrated towards raw jute production due to high demand of Jute products as well as Raw jute to the foreign countries. Figure 03 implies that jute cultivation land in hectare are increasing from 2006 to 2012. , while India remaining more or less constant in % of Raw jute production to the total Agricultural production.

Table 04 & Figure 04 indicates that productivity of Raw Jute ie, tonne/hectare, where India exhibited increasing trend from 2006 to 2008. In 2006 ,productivity was 2.35 tonne/hectare whereas in 2012, it was increased to 2.39.

Table 04: Productivity of Jute (in Tonne/Hectare) Over Different Years :-

Country	2006	2007	2008	2009	2010	2011	2012
India	2.35	2.25	2.21	2.49	2.34	2.00	2.39
Bangladesh	2.11	1.90	2.02	2.22	2.22	2.15	1.91
China	2.20	2.37	2.59	2.59	3.01	3.22	3.21
Nepal	1.43	1.43	1.47	1.51	1.60	1.37	1.37

Source : www. worldjute.com

In 2011 India Raw Jute productivity was decreased due to poor rainfalls and poor rainy seasons. Bangladesh exhibited decreasing trend of productivity of Raw Jute oin the year 2011 % 2012. Figure 04, indicates that China the productivity was increasing trend from 2006 to 2012. The country undertaken various Research activities in Agricultural crop production including Raw Jute cultivation

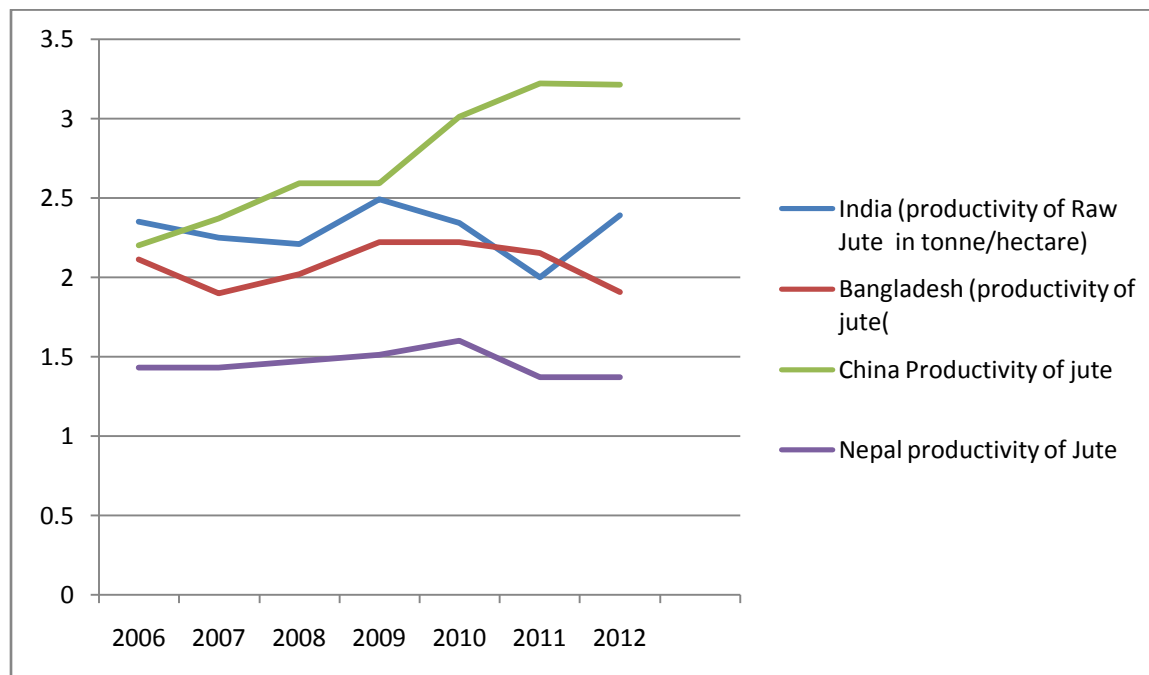


Figure 04 : line diagram indicating productivity of Raw jute (tonne/hectare) ,(Y axis indicates Productivity Tonne/hectare)

Table 05 indicates Jute industry position in Bangladesh and India. India has 84 big composite Jute Mills. Here both spinning and Weaving are going on simultaneously. Around 350000 peoples are directly linked with this industry. The figure is much higher than Bangladesh . In Bangladesh , a large number of small Jute units are situated.

Table 05 : Information Related to jute Industry in India and Bangladesh in recent years

Countries	No .of Jute Mills	Labor Force	No of Installed Looms
Bangladesh	227(Spinning-88)	156549	21181
India	84 (Composite)	350000	49529

Source : [http:// jute yarn-bjsa.org/juteataglance.php](http://jute yarn-bjsa.org/juteataglance.php). Annual report,IJSG,2012-13.

These mills are mainly export oriented Yarn manufacturing units. Number of installed looms are comparatively much less than India. In India, modern shuttle less looms, STB , Suljer , Rapier etc, were already installed which gives superior quality of Fine fault free Jute fabrics which have high economic value. Bangladesh is much smaller country than India. Around 156549 number of people are directly linked with such industry. So, a large number of peoples live hood are dependent on such industry.

Table 06 indicates Average production of Jute goods in Bangladesh was 663000 tonne/annum, whereas India exhibited 1575000 tonnes /annumjute products. The value is much higher in case if India. Percentage of Jute sector in GDP of the country is 4 % , which is much higher than India. Indian Jute sector contributes towards GDP of the country is 0.0315 v% . Recent years Govt. of India has concentrated on Jute goods as packaging materials of food grains eg, Rice. High order were placed by different state Govt

Table06 : Information Related to Jute Industry in India and Bangladesh in recent years

Countries	Average Production in Jute Mills Per Annum	JDP Manufacturers	% of Jute Sector in GDP
Bangladesh	663000 tonnes	No. of SMES = 604 No .of Workers =50000	4 %
India	1575000 tonnes	No. of Artiseans =140000	0.0315 %

Source : [http:// jute yarn-bjsa.org/juteataglance.php](http://jute yarn-bjsa.org/juteataglance.php). Annual report,IJSG,2012-13.

. Under this circumstances, Indian Jute Industry gets fresh motivation for productivity improvement and higher production to meet the Govt. B Twill bags orders. It is expected that , contribution of Jute sector towards country's GDP will enhance in future.

Table 07 indicates Jute goods production of India and Bangladesh over different financial years. From Figure 05 , it is observed that , Jute goods production of India has been increasing from the year 2010-11 to 2012-13

Table 07 : Production of Jute Products (In '000 tonnes) of India and Bangladesh Over different financial years :

Countries	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13
India	1356.3	1776	1633.7	1323.3	1565.7	1582.4	1591.3
Bangladesh	583.61	651.05	588.85	695.17	729.02	885.26	977.32

Source : www.jute.org/statistics

. In 2010-11, Indian Jute goods production was 1565.7 thousand tonnes. In 2012-13, the Jute goods production was increased to 1.6 % and attained 1591.3 thousand tonnes. In case of Bangladesh , continuous growth of Jute goods production had observed. In the Financial year 2006-07 the Jute goods production were 583.61 thousand tonne. In 2012-13, the Jute goods production was increased by 67.5 % and attained to 977.32 thousand tonne.

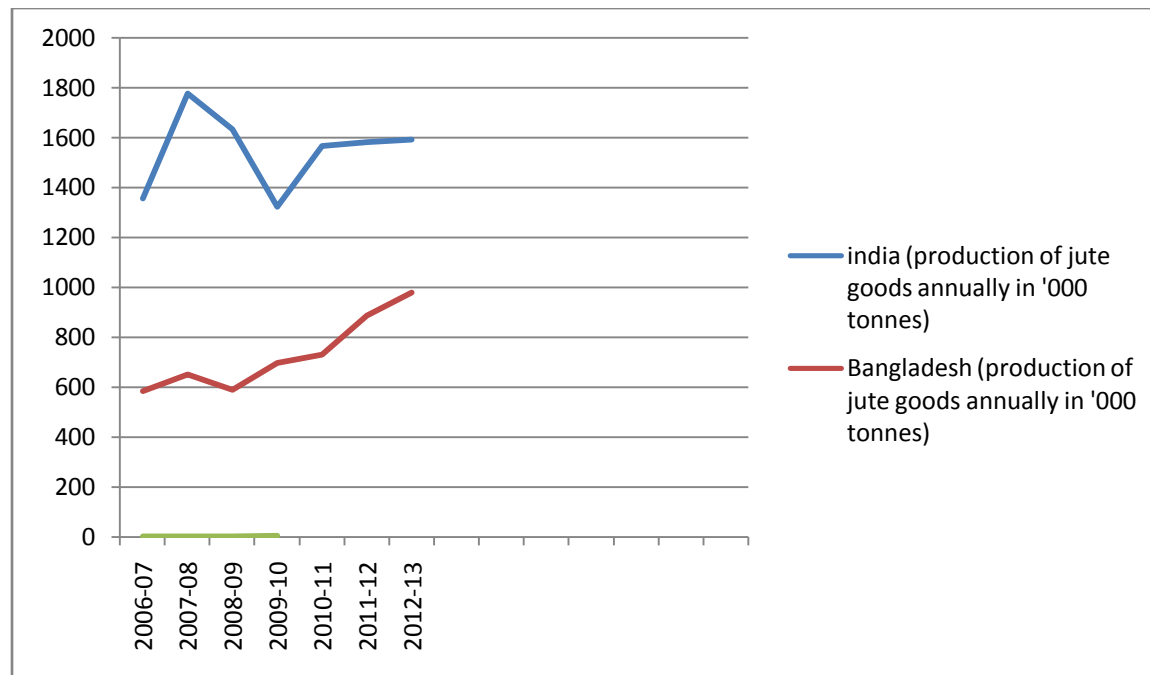


Figure 05 : line diagram indicating Annual production of Jute goods of India and Bangladesh over different Financial Years(Y axis indicates production of jute goods in Tonne)

Table 08 explained the Jute and allied Fibre yarn export of Bangladesh and India over different financial years. In the year 2007, Bangladesh Jute & allied fibre yarn export was 317730 tonnes and value of it was 215543 thousand USD. At that time , Bangladesh was contributed to 80.3 % of share to the global Jute & Allied fibres yarn export. In the year 2012, Bangladesh achieved 396713 tonnes Jute yarn export increased by 24.8 % in quantity than 2007. The value of such item were 375197 thousand USD (Which was increased by 74.07 % of USD value). In 2012, Bangladesh was contributed to 86.17 % of total global Jute yarn export. So, share Jute yarn export of Bangladesh has been increasing from 80.3 % (2007) to 86.17 % in the year 2012.

Table 08 : Comparative Analysis of Export quantity and Value of Jute and allied fibers Yarn between Bangladesh and India Over Different Financial Years:

Years	Bangladesh Jute & Allied Fibers Yarn Export		India. Jute & allied Fibers Yarn Export	
	Quantity (Tonne)	Value '000USD	Quantity (Tonne)	Value '000USD
2007	317730 (80.3 %)	215543	57284 (14.48 %)	43471
2008	275885 (76.05 %)	231254	71167 (19.62 %)	52654
2009	268725 (83.84 %)	217744	37162 (11.59 %)	30569
2010	343199 (74.54 %)	428007	104103 (22.61 %)	103606
2011	375495 (84.87 %)	453005	55614 (12.57 %)	65839
2012	396713 (86.17 %)	375197	53097 (11.53 %)	51607

Source : ITC Trade Map

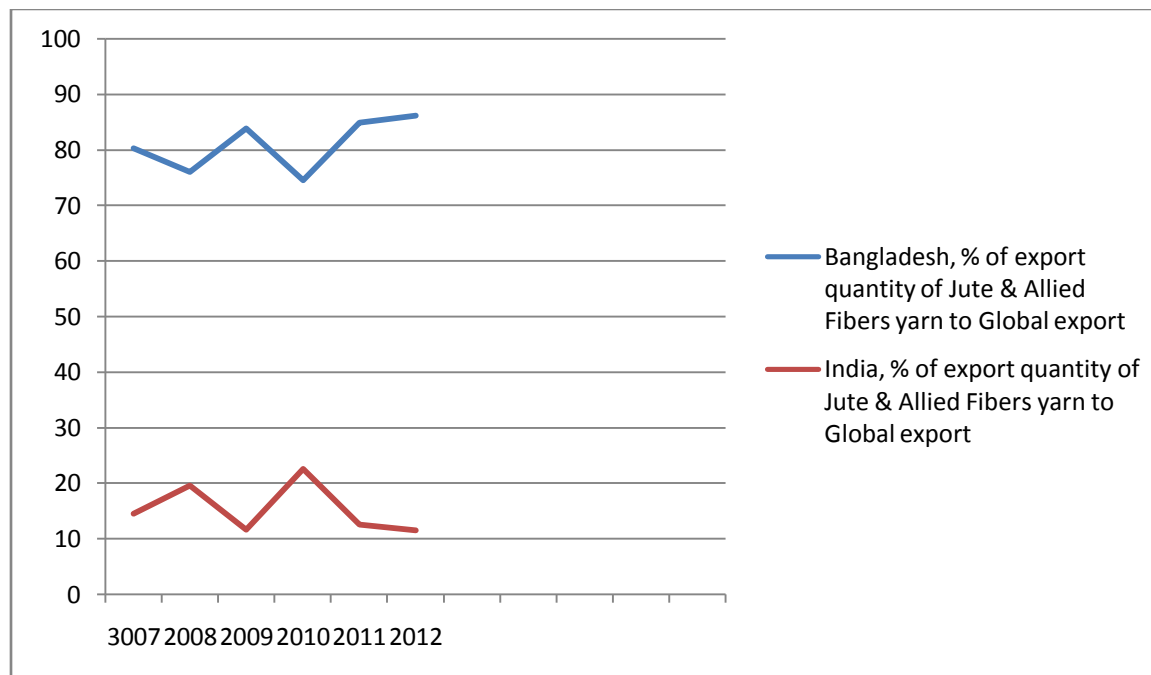


Figure 06 :Indicating % of Export quantity of Yarn of jute and Allied Fibers to global export Of Bangladesh and India over different Years.(Y axis Indicates % of Global Export)

Figure 06 explained the Indian quantity of Jute yarn export share to the global export. The yarn export share is fluctuating from 2007 to 2012. In 2007, India exported 57284 tonnes of Jute & Allied fibre yarn

which was much higher in quantity than Bangladesh export. Alue of such quantity was 43471 thousand USD. In 2012 , the quantity of export has been decreased to 7.3 % and attained 53097 tonne, whereas export value has been increased to 51607 thousand USD value.

Table 09 : Comparison of Prices of jute at grower Level over different Financial Years

Year	Bangladesh (USD/Tonne)	India (USD/Tonne)
2008-09	387.41	432.80
2009-10	608.85	581.51
2010-11	614.94	767.97
2011-12	414.18	526.25
2012-13	427.60	465.93

Source : FAO Bulletin on jute, kenef,September 2012.

In Bangladesh most of the jute farmers belong to the small farmer categories. These farmers have inadequate holding capacity, which propels them to offload their produce by the earliest opportunity. Table 10 and Figure 07 show that Indian growers enjoyed better Jute prices than growers of Bangladesh from the financial year 2008-09 to 2012-13. This feature is very important for the sustainability of the growers. In 2010-11 growers of both the countries enjoyed better prices comparing with previous years prices. But in 2011-12 Bangladesh growers faced a sharp decline by around USD 200/Tonne in Jute Price. On the other hand Indian growers also faced a decrease in jute price in 2011-12 which was low in magnitude compared with the price decline in Bangladesh due to MSP support. Jute Corporation of India (JCI) acts to the central government's agency undertaking price support operations. JCI procures raw Jute directly in 171 procurement centers or through its agents including primary co-operative societies. These initiatives played a vital role for getting better prices of raw Jute in India at grower level.

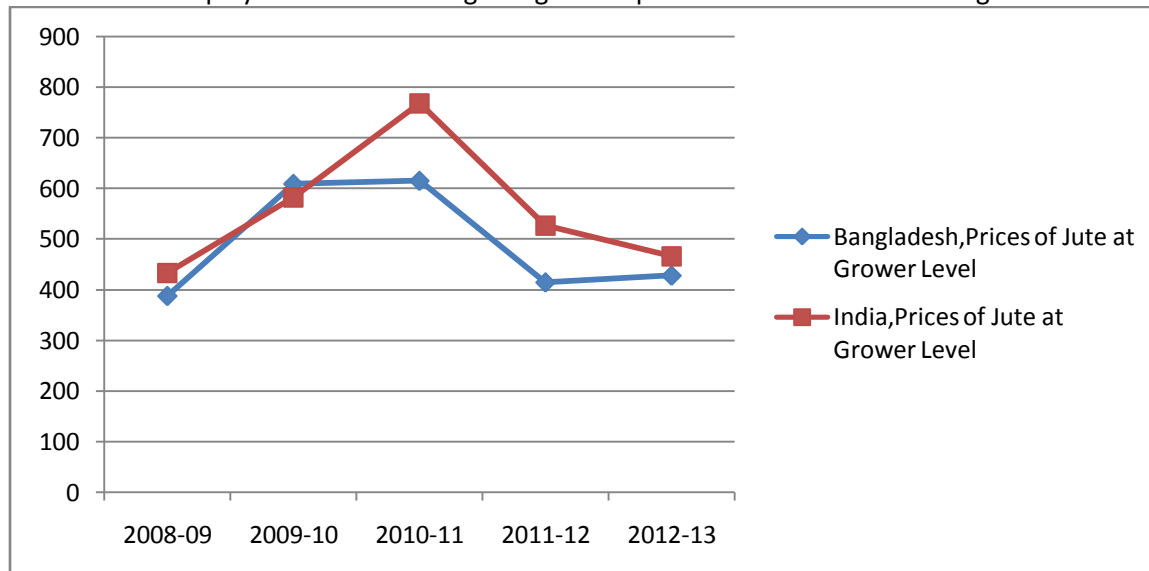


Figure 07 : Indicating Comparison of Prices of jute at grower level over different Financial year
Y axis indicating USD/tonne

CURRENT STATUS OF BANGLADESH JUTE INDUSTRY:

Bangladesh 's export earnings from Jute and Jute goods in the fiscal year 2012-13 showed an increasing of 6.54 % over the previous year, according to Export Promotion Bureau (EPB) data. Bangladesh 's earning from the Jute sector were US \$ 1.01 billion during July 01 ,2012 to June 20 2013 period. The data

indicated that the export of Jute Bags and sacks increased by 28.16 % year-on-year to fetch US \$237.43 million in foreign exchange for Bangladesh. The earnings from Jute goods exports registered an increase due to a rise in demand of Natural fibre made products across the global markets ,as a result of the ban of plastic bags implemented in many countries ,according to Industry analysis. In the current season , Bangladesh is expecting bumper Jute production owing to favorable climatic condition and adoption of latest farming technologies by Jute growers, according to the Dept. of Agricultural Extension (DAE).

CONCLUSION :Bangladesh is an Agricultural country with some three fifth of thr population are engaged in farming. Jute and Tea are the principal sources of earning foreign exchange.The Government should give mandatory order to use Jute bags as packaging materials for specific sector like food grains, cement, Sugar, Fertilizer etc. Indian, Chinese Jute diversified goods are more popular because of their product range and depth , colours, designs and quality.The Government should take strategic planning foe the promotion of Jute sectors in short,mediumand long terms. The researches and development activities should be continued and strengthened for production and processing of Raw Jute to increase yield and reduce production cost by interacting with International promotional bodies.

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