CHAPTER - V

SUMMARY AND CONCLUSION
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Findings
The following are the findings of the study on the application of descriptive analysis.

- The bed linen export performance showed an increasing trend in terms of value during the year 2002.
- The bath linen export performance of home furnishing fabrics showed a steep increase from the year 2001.
- The export performance of table linen and kitchen linen home furnishing fabrics showed a manifold increase in the year 2001 to the tune of 275.94% when compared to the previous years.
- The export performance of curtains, draps & furnishing fabrics have shown an increasing trend with the highest percentage increase of 21.83% during 2003.
- The export performance of blankets during the study period showed a huge increase in the trend during 2003 i.e. 72.30% and started declining from 2004 onwards.
- The export performance of carpets and floor coverings from India showed an inconsistent trend throughout the study period. There was a huge negative growth during 2002 i.e. 18.59% and a moderate positive growth during 2004 i.e. 12.76%.
- The export performance of clothing accessories and other made-ups has shown a huge increasing trend during 2003 i.e. 23.67%.
- The overall export performance of home furnishing fabrics has raised to its maximum performance in the years 2004 (17.01%) and 2005 (12.315).
- The share of home furnishing fabrics export has consistent contribution of 4.35% on average to the total textile exports from India during the study period.
- Majority (76.33%) of respondents were small scale units.
- Majority (73.33%) respondents were sole proprietorship concerns.
• Most of the units have (39.33%) experience of 10-20 years.
• Most of the small scale units were having below 15 looms.
• A maximum of 44% of the medium scale units were having 50-74 looms.
• Majority of the large scale units were having 200 and above looms.
• Majority (67.26%) of the respondents belong to small scale units and were using below 15 looms for exports fabric production.
• A maximum of (42.31%) of respondents belonging to medium scale units were using 50-74 looms for production of fabric for export purpose.
• A maximum of (46.67%) of the large scale units were using 200 and above looms for producing fabrics for export purpose.
• Majority of the respondents were possessing below 100 looms in all the width’s.
• A Maximum of 26.67% of the respondents produce kitchen towels in home furnishing fabrics.
• Majority (64.67%) of the respondents had two shifts per day in their manufacturing units.
• Majority (85.67%) of the respondents were paid on piece rate basis.
• Majority (91%) of the respondents were paying their workers on weekly basis.
• Majority (76%) of the respondents were giving an ordinary rate as overtime charges.
• Majority (88.33%) of the respondents confirm that there was no training program by weaver service center.
• A Maximum of 40.33% of the respondents had power cuts occasionally.
• Majority (72%) of the respondent had generator of their own.
• Out of those who use generator, 43.06% of the respondents stated that it involves high cost.
• Majority (79%) of the respondents do not avail electricity subsidy from the government.
• A Maximum of 41.27% of the respondents were just satisfied in availing for electricity subsidy.
• Majority (82.67%) of the respondents use cotton as raw material for manufacturing.
• Majority (53.67%) of the respondents opined that the quality of raw material was good.
• Majority (54.67%) of the respondents opined that there was no scarcity of raw materials.
• Majority (54.41%) of the respondents opined that scarcity is occasional regarding availability of raw materials.
• A Maximum of 49.33% of the respondents opined that prices of raw material were moderate.
• Majority (64%) of the respondents opined that the maintenance of machinery was good.
• Majority (52.33%) of the respondents opined that there was stoppage machinery due to repair.
• A Maximum of 29.5% of the respondents opined that oiling and greasing will prevent stoppage of looms and that will be the best measure.
• Majority (54%) of the respondents were selling the product in domestic markets.
• Majority (59.67%) of respondents engage middle men for effecting sales.
• Majority (62.5%) of the respondents feel that the performance of their middle men is good.
• Majority (73.33%) of the respondents do not get orders directly. This implies the fact that they get orders through other methods such as middlemen or agents.
• Most of (39.09%) respondents secure orders through agents.
• Majority (61%) of the respondents have the plan to enter into export market directly in the near future.
• Majority (45.89%) of the respondents are unable to export directly due to financial constraints.
- Unawareness about export market details, non availability of details of the real buyers, unawareness about the export finance by the government are the main problems associated with direct export of home furnishing fabrics.
- Majority (70%) of the respondents do not have membership in expert promotion councils.
- Majority (57.78%) of the respondents have membership in power loom development expert promotion council (small power loom manufacturers)
- Majority of the respondents are fairly satisfied towards the availability of raw materials, quality & raw materials, price of raw materials, availability of skilled labour, workers performance, transport facilities communication facilities and not satisfied towards the support from banks and financial institution, support from professional bodies, support from government on rates of electricity, support from government by means of the concession.
- Most of the respondent have strongly agree that the exporting helps industrial economy and national growth (140) agree that the quality of the products helped better export marketing (173), disagree that the labour problems of manufacturer do not affect the export marketing (112) and strongly disagree that the financial problems of manufacturers in relation to the expert of home furnishing fabrics.
- Most of the respondents strongly agree that the Indian home furnishing fabrics products are known for its varieties and design and preferred by buyers as the strength factor.
- The respondents strongly agree that the most important weakness of the industry is that majority of power loom weavers in our country are master weavers who weave the fabric on job were basis and delivery persons will give the order for yarn.
- The respondents (150) strongly agree that the government efforts to promote Hi tech weaving parks and integrated textile parks are opportunities factors.
The following are the finding of the study on the application of Chi-square analysis.

- The large scale units and number of looms having 100" width alone have significant influence on the sources of procurement.
- The number of looms having 90" and 100" alone have significant influence on the frequency of power cuts.
- Majority of the organizational factors have significant influence on the cost of using the generator for alternative power supply.
- Majority of organizational factors do not significantly influence the level of satisfaction over availing subsidy from the government.
- The respondents having looms with width of 36" and looms having 76" width have significant influence on the opinion over the quality of raw materials.
- The small scale units, large scale units and rates of overtime wages alone have significant influence over the opinion on scarcity of raw materials.
- Form of organization, number of looms having 105" width, number of shifts per day and rates of wages for over time have significant influence on the opinion over the price of raw material.
- The respondents with number of looms having 72" width alone have significant influence on the reasons for not exporting at present.
- Majority of organizational factors and personal factors have significant influence over the opinion on electricity charges.

The following are the findings of the study on the application of average rank analysis.

- Irrespective of the size of the units, unawareness about export market details of home furnishing fabrics is the top priority problems faced by the exporters.
- All the forms of organizations have given top priority to the unawareness about market details as their among the problems faced in exports.
• The respondents irrespective of their experience have given unawareness about market details and market formalities among the important problems in export.

• The respondents of small scale units having looms up to 24 have given top priority to unawareness about export market details and respondents having 25 looms and have given top priority to unawareness of export market details among the important problem in exporting their products.

• Majority of the respondents in medium scale industry have given top priority to unawareness about the export formalities among the problems in exporting their products.

• Exporters having below 100 looms and 200 & above looms have given top priority for unawareness about export market details, unawareness about the export formalities towards their problems in exporting their products.

• The respondents of small scale units using less than 24 looms for export production purpose have given top priority to unawareness about export market details followed by non availability of buyers’ details and unawareness about the export formalities as their problems.

• All the medium scale units irrespective of the number of looms for export production purpose have considered that the unawareness about export market details as their top priority problems in exporting products.

• The respondents using below 100 looms, 100-200 looms, 200 and above looms for export production purpose have given top priority to non availability of buyer details unawareness about export details and unawareness about export formalities respectively among the problems in export.

• The respondents having less than 20 looms with width 36” given top priority to unawareness about export formalities as their problems, however respondents having 20 and above looms have given top priority to unawareness about market details among the problems in export.

• The respondents having 10-20 looms and 20 and above with width 50” looms have given top priority to unawareness about export market details among the problems in export.
• The respondents having 10-20 looms and 20 and above looms with width 56” have given top priority to unawareness about export market details among the problems in export.

• The respondents having 72” looms of different numbers have given top priority to unawareness about export market details as their main problems in exports.

• The respondents of having below 10 and 10-20 loom with width 90” have given top priority to unawareness about export market details as their problem in exports; However, the respondents of the same category having 20 & above looms have given top priority to unawareness about the export formalities as their main problems in exports.

• The respondents having 150” type of looms irrespective of their number of looms have given top priority to unawareness about export market details as an important problem in direct exporting.

• The respondents running one and three shifts per day have given top priority to unawareness about the export formalities given top priority to unawareness about expert market details as their problems in exporting markets.

• The respondents who follow both time rate and piece rate have given top priority to unawareness about export market details as their problems.

• The respondents irrespective of methods of payment have given top priority to unawareness about export market details among the problems in exports.

• All those respondents who are paying double rate overtime have given top priority to unawareness about export market details among the problems in exports.

The following are the findings of the study on the application of average score analysis.

• The respondents of small scale units feel that the cost of using generator is high.
• The respondents of public limited companies feel that the cost of using generator is high and private limited companies are of the opinion that the price of raw material is high.

• The respondents in 20 years and above experience feel that the cost of using generator is high.

• The large scale units having below 200 looms are of the opinion that the cost of using generator is high and the subsidy from the government is highly satisfactory.

• The respondents under small scale units having 15 looms involved for exports medium scale units having 50-74 looms involved for exports feel that the cost of using generator is high. The respondents under large scale units having 100-200 looms for export purpose are highly satisfied with the subsidy from the government.

• The respondents under loom width size 105” 36” and 50” having 20 and above looms feel that the subsidy from the government is highly satisfactory.

• The respondents having three shifts per day feel that the cost of using generator and the price of raw materials are high. The same category feel that the quality of raw materials is good.

• The respondents who follow time rate wage system are fairly satisfied with the subsidy from government.

• The respondents who are paying on daily basis to their workers feel that the cost of using generator is high.

• The respondents who are paying ordinary rate to their workers for overtime feel that the cost of using generators is high.

• The respondents of different categories to the size of the units are fairly satisfied with regard to availability of raw materials.

• The respondents are the satisfied with availability of raw materials, availability of skilled labour and the performance of their workers.
- The respondents of different categories are fairly satisfied with the availability of skilled labour, support from banks and financial institutions, transport and communication facilities.
- The respondents under small, medium and large scale units irrespective of their number of looms are fairly satisfied towards majority of the aspects related to expert of home furnishing fabrics.
- The respondents of different scale operations with different number of looms involved in exports are fairly satisfied with regard majority of the aspects considered.
- Irrespective of the loom width size, the respondents are fairly satisfied towards availability of raw materials, communication facilities and transport facilities.
- The respondents with number of shifts system are fairly satisfied with the availability of raw materials.
- The respondents paying time rate and piece rate as wages system are fairly satisfied with the availability of raw materials.
- The respondents with different size of the unit feel that exporting helps industrial economy and national growth is an agreeable statement.
- The respondents from different forms of organization feel that the exporting helps industrial economy and national growth is an agreeable statement.
- The respondents with less than 10 years and more than 20 years of experience feel that the exporting helps industrial economy and national growth.
- The respondents having small, medium and large scale units are of the opinion that exporting helps industrial economy and national economy is an agreeable statement.
- The respondents having small, medium and large scale units in looms for exports feel that exporting helps industrial economy and national growth is an agreeable statement.
- The average score analysis of the respondents based on number of shifts feel that exporting helps industrial economy and national growth as an agreeable statement.
• The respondents giving time rate and piece rate wages are of the opinion that exporting helps industrial economy and national growth is an agreeable statement.

• Respondents giving different modes of payment to workers feel that exporting helps industrial economy and national growth is an agreeable statement.

• Respondents giving different rates for overtime wages feel that exporting helps industrial economy and national growth is an agreeable statement.

The following are the findings of the study on the application of SWOT analysis.

• It is concluded from the SWOT analysis that the very important factors for strength, weakness, opportunity and threats are respectively, Indian home furnishing fabrics products are known for its varieties and design and preferred buy the buyers, 90% of the power loom weavers in our country are master weavers who weave the fabrics on job work basis and delivery persons will give the order yarn. Even those delivery persons/ middlemen do not export and giving the fabric to merchant exporters, India is a largest country which produces textile technocrats have so many engineering colleges which offer the technical education and so many institutions are in the developing stage of producing technocrats and services and 100% cotton fabric being consumed by market and by increased demand will increase the cost of home furnishing fabrics.

The following are the findings of the study on the application of Multiple Regression Analysis.

• Among the various strength factors “Home furnishing fabrics are ordered in a small lot as there are many number of products” is the important strength factor which explains that home furnishing fabrics are ordered in a small lot as there are many numbers of products.
• "Even though market assistance is given to some extent, it is not reaching the weavers directly" is an important weakness factor which explains even though market assistance is given to an extent it is not reaching the weavers directly.

• The World is looking at India as strong in the raw materials and manufacturing and hence the international organizations predicted export will increase by 50% is an important opportunity factor.

• "As home furnishing fabrics industry predominantly based on cotton fibers and cotton fibers based on agriculture and nature, any natural disaster like tsunami will affect the inflow of cotton is important threat factor.

The following are the findings of the study on the application of factor analysis.

• The factor the value of home furnishing fabrics varies steeply based on product style and the fluctuation in price of the raw materials does not matter much is the important strength factor (0.784) than other.

• The factor as manufacturers are small in size, and they are not ready to take risk in export marketing in the important opportunity factor (0.794) than others.

• The factor as home furnishing fabrics, unlike other factors needs more designs and Indian weavers are known of designs is the important threat factor (0.778) than others.

• The home furnishing fabrics industry predominantly is based on cotton fibers and cotton fibers based on agriculture and nature. Any natural disaster like tsunami will affect the inflow of cotton (0.653) is the important threat factors.
Recommendations

On the basis of results of the study, the following recommendations are made.

1. Direct export orders

It is found from the study that the manufacturing units were not getting direct orders for exporting their products. On the other hand, they were able to get orders only through middlemen. This situation is due to the reasons of lack of awareness about market details, buyer details and due to financial problems. Suitable measures are to be taken by the government for creating awareness about the market and buyer. It is also important for the industry to sort out the issues for meeting necessary financial assistance for exporting of home furnishing fabrics.

2. Modernization

It is important that the exporting units need to go for modernization of their units and thereby strengthen their infrastructural facility. Modernization of the units is required to cater to the global changes in the market needs. This will help the units to go for export marketing efficiently as they will be sound enough to face global competitors.

3. Design development

What is required for the manufacturing units in going for export marketing is the design development. The design development is necessary not only for facing global challenges but also for the self development. As home furnishing fabrics are consisting of different types of products involving different design in each product, design development facilities needs to be made available in the manufacturing units.

4. Entrepreneurial development training programme

Entrepreneurial development training programme shall be conducted frequently in the weaving clusters about the production and marketing of home furnishing fabrics. This sort of training programme is not only an opportunity for them to develop their entrepreneurial skill but also equip themselves for better leadership to execute their knowledge towards global marketing.
5. Role of Export Promotion Council

The market information and marketing assistance are important requirements to the manufacturers of home furnishing fabrics. This will facilitate them to adopt themselves for better positions in exporting their products. Export promotion council and other service providers should have a special programme for the manufactures towards development, training, grading consciousness and market information.

6. Branding of home furnishing fabrics

The manufacturers must be able to establish brand name for their products. Branding is important not only for domestic market but also for international market. Hence, it is recommended that necessary effort must be made by the manufacturers for exposing the home furnishing fabrics in the international market to create the linkage for the international buyers to buy from India.

7. Weavers consortium

The weavers’ consortium can be created in every weaving cluster for marketing and showcasing their products in the international market. This will facilitate exchange of information between them for enriching themselves in the area of exporting. This consortium can also work on providing knowledge about the existing exporting financing schemes and motivating them to enter on direct exporting.

8. Role of Hi-tech weaving parks

Hi-tech weaving parks and the integrated textile parks can focus on the home furnishing fabrics in the area of production and marketing by providing the latest manufacturing facilities and the infrastructure. This will certainly help the manufacturers to update themselves for facing the competition from national and international market.

9. Control over transaction cost

The manufacturers of home furnishing fabrics must be able to control the transaction cost and the logistics time so as to compete with international market. This attempt is deliberately required in order to have better cushion for themselves in the market, where there are large numbers of competitors playing with different tricks.
10. Electricity subsidy

The manufacturing units of home furnishing fabrics feel that the subsidy given for electricity is not adequate. In fact, they are very much in need of this subsidy to come out of the cost hike in the charges of electricity or the generator. This is a perennial problem which enhances the cost of product and in turn it affects the marketability of product particularly in export marketing. It would be more useful, if the government considers the grant of adequate electricity subsidy to the manufacturers of home furnishing fabrics as a sound measure for developing their competency in export business.

Conclusion

Home furnishing fabrics form part of major textile products for which there is a good demand both from domestic and international market. In production, the manufacturing units have to focus on the two important aspects. One is, the quality and another is the variety and design elevated by technological advancement. In marketing, they have to concentrate on collection of market information, availability of buyers and obtaining export orders. Though, presently middlemen are more employed in export marketing and direct marketing is found insignificant, in the long run, if all these aspects are considered, and if focus is made on the same, manufacturer will definitely find good market for their products at the global level too. However, it is also important to note that nature of market, its merits and demerits are also to be thoroughly examined in addition to the analysis of home related issues. On this basis, it is worth to note that manufacturing units must be able to develop their infrastructure not only to suit to technology advancement but also to domestic environment. The need for studying domestic environment is so essential not only due to have better foot in domestic market but also due to assess their capability and competency in order to match their quality and standards to that of competitors. However, the success depends on how these issues are sorted out to overcome the problems with a broad outlook to capture major share in the exporting.