2. Structure of the Demand for Cotton Textiles

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* Shifts in age
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* Number of Households

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* Working women and social emancipation

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* Films
* Environment
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* Technological progress
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* Size of the users
* Regional distribution of users
  ← Meeting the changes in demand
Introduction

The bulk of the cloth produced by the mill enterprises goes to satisfy the demand which emanates from oxcres of people scattered throughout the length and breadth of the country. This enjoins upon the mill management/s and the market intermediaries to consult them in regard to their wishes and tastes. In fact, in order to respect the pre­dilections of the cloth buyers and/or users, the manufactur­ing and the distributive organisations should have the knowledge of the structure of demand so as to enable them to reap the benefits of the researches into consumer motivation, attitudes, cognitions, beliefs, perceptions, emotions, opinions, etc. These will also enable the distribu­tion personnel of the mill units and of a subsequent channel component/s to assess their efforts in meeting the diversified needs of their contrasting types of fabrics, particularly in a competitive marketing environment.

Any inquiry into the structure of demand would attempt to seek out and measure the forces that determine sales; and, this Chapter aims at analyzing the different demand deter­minants i.e. the forces—both controllable* and

* Controllables are those which can be directly influenced by the individual mill unit’s decisions and actions and include its product/s—the fabrics, distribution channels, physical transfer, promotional programmes, prices, etc.
uncontrollable— that affect demand, and their impact on various aspects of the structure of the cotton textiles market.

The too volatile nature of the demand for textiles makes the marketing task most challenging. However, its identification, to the extent possible, would help the distribution personnel, operating at various trade levels as also the managements to judge to what extent the distributive machinery installed by them serves to meet a particular type of demand of a distinct region or category of buyers.

An attempt will also be made here to examine (a) the size, the nature and the regional characteristics of the demand for cloth and (b) the quantitative and qualitative changes which are taking place in them owing to the multidimensional influences of the demand determinants. Again, where possible, the likely impact of the trends on the effectiveness of the distribution channels and other implications will also be pinpointed.

India is a country of long distances inhabited by a

* The uncontrollables consist, in the main, of those phenomena—demographic, economic, sociological, psychological, political, legal, etc.—that are external to the manufacturing and/or distributive organisations and cannot be directly influenced by an individual mill unit, and for the manipulation of which conscious efforts have to be made.
large population of considerable ethnic diversities. The vast country—with its enormous population having varied cultures, (ever changing) tastes and styles of costumes, habits, etc. and its dependence on good monsoon—perhaps offers greater diversity in the consumption of the versatile cotton fabrics than any other country in the world.

In Gujarat, in addition to the native Gujaratis, people have migrated from different communities and States; and, with diverse social background, customs and traditions, they have formed an interesting cross-section of the whole of India.

Insofar as clothing is concerned, everyone is a consumer—the target of mill enterprises, the beginning as well as the end of all marketing activities of the managements of the mills and of the subsequent channels of distribution. Thus, in broad social sense, the consumers of fabrics as a group are an integral part of the whole economic organisation. They constitute a market or field that the mill management/s, their field organisations and independent dealers in textiles (functioning in the vertical chain of distribution) seek to exploit in the hope of earning desired amounts of markups/margins. Though the fabrics constitute a common and essential commodity* and enjoy a universal markets, the

* Covered under the Essential Commodities Act, 1955—Clause 2(a)(iv).
efforts at understanding of their users—and of the aggregate demand—can possibly be unending because of the operation of constantly interacting forces. In addition to this, though cotton cloth seems to be a single product, it is in great measure heterogeneous. Hence, the complicating factor of product differentiation, makes the analysis a little complicated.

**Market for cotton fabrics**

A market is conceptualised as a place or a geographic area where buyers and sellers meet and function, goods or services are offered for sale, and transfers of ownerships of title occur. It may also be defined as an aggregate demand by potential buyers of a product or service. In fact, the terms 'market' and 'demand' are often used interchangeably and they also may be used jointly as 'market demand'.
wearable (as seen in Chapter I), the uses and users of these versatile fabrics are many and varied. They have provided men and women with clothing and with material for furnishing a home and some other needs. Different industries rely on textiles for power transmission, insulation, packaging, filtration, etc. The soldier at war is clad in textiles and is helped by a wide variety of other articles such as tentings, blankets, hammocks, cartridge belts, airplane and jeep tyres, and parachutes—all textiles in whole or in part. Here cotton fabrics has a great role to play.

A conclusion may be drawn from the above that the demand for cotton textiles arises mainly from two distinct groups of buyers each possessing some common characteristics: (the sole criterion being the reason for buying), viz., the Ultimate Consumers* and the Industrial Users†.

The country with her large numbers of ultimate and industrial buyers, offers a big domestic market for wearable

† The consumers buy either for their own or for their family's personal consumption. In doing so, they satisfy their non-business wants; they may seek their own personal satisfaction or the personal satisfaction of someone else for whom they buy.
‡ The industrial users purchase fabrics to further the production i.e., use them as a component of the product they manufacture for the ultimate consumers. Industrial users also include non-profit institutions such as Governmental agencies/Departments, Schools, Hospitals, Jails, etc. (whose operations are audited and reviewed by outside authorities).
and non-wearable cotton textiles including industrial fabrics. But there are numerous segments and elements that make up such fabrics market. Practically in every fabrics market, there are the fabrics users (men and women of all ages, and the bulk buying units) and/or buyers (persons buying on behalf of the users) and/or the advisers or purchase influences* (persons who prescribe and recommend use—the Tailors, the textiles traders, i.e., intermediaries in the distribution chain who carry stocks for resale. Sometimes, a single person may also be found acting in different capacities. For example, a housewife may be a user and a buyer of fabrics for the whole family, may decide to buy under the influence of other family members, may be a decision maker or buy under some pronounced colour or quality preference of her husband or a seller or a tailor.

This shows that the mill managements and the intermediaries have to deal with a large numbers of different groups/components acting, forcing and influencing the purchasers of cotton fabrics simultaneously. Similarly, a number of factors influence the cotton fabrics industrial market.*

(A): The ultimate consumer market: Demand determinants:

The domestic ultimate consumer market of cotton textiles

* These will be explained late in this Chapter.
consists in the opportunity to sell fabrics to satisfy personal or family requirements manifested by the inhabitants of the country as a whole. Clothing is a primary requirement and, thus, every person is a user of fabrics from the minutes of his birth to the hour of his burial. Of course, all the persons may not be the users of cotton fabrics manufactured by the mill industry. For instance, a staunch khaddar wearer buys fabrics turned out only by the khadi industry. But the size of such population is not quite big. Therefore, the determination of the number of possible users who will be willing and able to buy and of their regional distribution are of considerable importance to the mill industry in designing the overall marketing strategy including the distribution channel.

(a) Demographic factors

Size and Character of Population:

Since demand for the cotton textiles is scattered more or less in direct proportion to the strength of the consuming public, the size and the character of the population become principal contributors to the size and the change in demand. Growth in the total population will usually stimulate demand and widen the textiles market; its decline will lower the demand and result in a shrinkage of the market.

A few of the population quantitative and qualitative
components affecting demand for cloth will be analysed hereinafter.

Our country had, in 1971, 54.8* crores people living in 21 states and 8 centrally administered Union Territories. Gujarat, with a population of 2.6 crores accounted for 4.87 percent of the country's population and ranked 9th in population size among all the states. The size of the fabrics market has been, hitherto responding to this one major influence, viz., that of the growth of the population. The fluctuations—generally, upwards—in the population since 1901 are depicted in Table 2.1.

The Table indicates that the population in Gujarat had registered rises in all decades that were greater than the all-India figures. During the decade of 1961-71, the total population of Gujarat had increased by 29.35 % as against 24.75 % of All-India growth, indicating a relatively more rapid growth in the fabrics market in the former.

Population projection:

The Census results deal with the past. They indicate trends that enable business entrepreneurs to examine the present and project the future. In order to examine the

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* Census of India 1971, Series 1, Paper 1 of 1972 (p.3).
Table 2.2 exhibits the Population Projections for Gujarat State until 1981, made by a Panel of Experts.

The Experts believe that at the turn of the decade, Gujarat State would have 3.32 crore persons. The Mills will have to bear this fact in mind for their market projections. Also, those units that serve places in the other States will have to gear up their manufacturing and distributive programmes to the trend projections for them.

Future estimations of population growths in the different States and regions will help the textiles marketer arrive at better decisions in designing the products, in fixing up the prices, in determining the promotional policies and in deciding distribution strategies in relation to the sectoral/sectional differences.

The distributors of cotton textiles in Gujarat must have knowledge of the districtwise break-up of population as also the possible fluctuations therein in future. Table 2.3 gives the figures (i) for each District in 1971, and (ii) of the rates of increase during the 1961–71 decade.

Each district has its own peculiarities. In certain

<table>
<thead>
<tr>
<th>District</th>
<th>Population (in '000s) (1971)</th>
<th>Rate of increase in population during the decade (1961-1971)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jamnagar</td>
<td>1111</td>
<td>34.15</td>
</tr>
<tr>
<td>Rajkot</td>
<td>1624</td>
<td>34.39</td>
</tr>
<tr>
<td>Surendranagar</td>
<td>845</td>
<td>27.51</td>
</tr>
<tr>
<td>Bhavnagar</td>
<td>1405</td>
<td>25.54</td>
</tr>
<tr>
<td>Amreli</td>
<td>849</td>
<td>27.09</td>
</tr>
<tr>
<td>Junagadh</td>
<td>1657</td>
<td>33.00</td>
</tr>
<tr>
<td>Kutch</td>
<td>850</td>
<td>22.02</td>
</tr>
<tr>
<td>Banaskantha</td>
<td>1265</td>
<td>27.03</td>
</tr>
<tr>
<td>Sabarkantha</td>
<td>1138</td>
<td>27.09</td>
</tr>
<tr>
<td>Mehsana</td>
<td>2092</td>
<td>23.14</td>
</tr>
<tr>
<td>Gandhinagar</td>
<td>201</td>
<td>46.39</td>
</tr>
<tr>
<td>Ahmedabad</td>
<td>2910</td>
<td>36.82</td>
</tr>
<tr>
<td>Kaira</td>
<td>2451</td>
<td>23.96</td>
</tr>
<tr>
<td>Panch Mahals</td>
<td>1849</td>
<td>25.36</td>
</tr>
<tr>
<td>Vadodra</td>
<td>1980</td>
<td>29.64</td>
</tr>
<tr>
<td>Bharuch</td>
<td>1110</td>
<td>24.40</td>
</tr>
<tr>
<td>Surat</td>
<td>1787</td>
<td>36.01</td>
</tr>
<tr>
<td>Valsad</td>
<td>1429</td>
<td>25.57</td>
</tr>
<tr>
<td>The Dangs</td>
<td>94</td>
<td>31.60</td>
</tr>
<tr>
<td><strong>Total: Gujarat State</strong></td>
<td>26697</td>
<td>29.39</td>
</tr>
</tbody>
</table>

districts, one can also observe the differences in the dress patterns. And, increases in the populations of advanced districts like Ahmedabad, Kheda and Vadodra influence demand

rises in manners different from those in the cases of relatively backward districts like the Panch Mahals, The Dangs and Bharuch. The Census-data about them will assist them in planning not only the product and production strategies but also the extracompany distribution organisation.

**Sex-ratio**

The size of the human population may determine the total quantity of the fabrics needed, but it will not be of help in designing the products strategy as the types of the fabrics needed by the different classes of consumers will be different. An important element is the sex. The distinctive needs of the male and the female populations assist the cloth manufacturers in determining the proportion of the various types of the fabrics and varieties to be produced by them for the two sections. Thus, for instance, where the sex-ratio tilts in favour of the female folks, the demand for sarees, cloth (prints, chints, voiles) for Blouses, Frocks, Skirts, Khamas, Salwar, Chania, Choli, Underwears, etc., will be larger than that for men-wears and the mill units will have to make adjustments in their patterns of production accordingly. (Yes, in certain wears, where the 'sort' of the cloth is the same for both the men's and the women's apparel, the sex-ratio impact may prove to be marginal.)

Table 2.4 presents the sex-ratios for Gujarat and India,
in 1961 and 1971.

Table 2.4

<table>
<thead>
<tr>
<th>Years</th>
<th>Sex Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gujarat</td>
</tr>
<tr>
<td>1961</td>
<td>1000 : 940</td>
</tr>
<tr>
<td>1971</td>
<td>1000 : 934</td>
</tr>
</tbody>
</table>

The Table shows that there were fewer women per 1000 men in 1971 as compared to the position in 1961, though the fall in the ratio was a little less severe in the case of Gujarat. This situation compels the mill managements to lay a greater emphasis on the fabrication of sorts like dhoties, shirtings, coatings, and poplins that are used by the males. It must be borne in mind, however, that the sex-ratios in different areas in the State vary and the marketing organisation has always to be structured through a careful analysis of the composition of population therein.

Age composition

The age of human beings exercises a significant influence on the character of demand. There is a high degree of correlation between the age composition of the textiles consuming public and the consumption patterns/dress patterns, as can be observed from consumer behaviour all around.

Table 2.5 exhibits the age composition of the population
of the country in general and Gujarat in particular as available for 1961.

### Table 2.3*

<table>
<thead>
<tr>
<th>Age-group</th>
<th>Gujarat 1961* (‘000s)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4</td>
<td>3271</td>
<td>15.83</td>
</tr>
<tr>
<td>5-14</td>
<td>5575</td>
<td>27.02</td>
</tr>
<tr>
<td>15-24</td>
<td>3576</td>
<td>17.38</td>
</tr>
<tr>
<td>25-44</td>
<td>5218</td>
<td>25.29</td>
</tr>
<tr>
<td>45-59</td>
<td>1967</td>
<td>9.52</td>
</tr>
<tr>
<td>60 and above</td>
<td>1020</td>
<td>4.73</td>
</tr>
<tr>
<td>Age not stated</td>
<td>6</td>
<td>0.23</td>
</tr>
</tbody>
</table>

Thus, in the year 1961, over 15.83% of the population in the State consisted of infants aged < 5. This completely dependent infant segment gave a particular tilt to the demand structure as their per capita cloth requirements in terms of size/quantity as well as the colour, texture, design, appearance, etc. were totally different as compared to those of the other age groups. Again, what is bought for this group chiefly depends upon the adult decision makers who determine the buying patterns.

5-14 age group formed a little over 27% of the total

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population. Of this, a lion's share was of the school-going children. Now, the educational institutions at the primary and the secondary levels have made uniforms compulsory for their taught. Most of the 27156 educational institutions comprising of primary, secondary, higher and other levels did, thus, have an impact on the dress materials demand.

Similarly, the increasing emphasis on 'Buniadi Shikshan' has had some adverse impact on demand. With the rise in the number of such institutions, the strength of the students has been expanding progressively. This accelerates the reduction in the consumption of mill made fabrics as both the teachers and the pupils have to wear Khadi compulsorily in the institutions.

Moreover, the consumption habit formed during this age lasts long and percolates into the next segments/age groups. The mill units have to keep this vital factor in mind while projecting the sales volume through the interpretation of current demand break-up. Yes, the spread of the message of this type of education is concentrated in specific geographical areas and, more or less, in particular categories of the population like the Adivasis, Harijans and other economically backward communities. But, it does, to that extent, generate a negative influence on the demand for the mill made cotton fabrics.

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* Source: Office of the Director of Education, Gujarat State.
Another segment consists of the young persons aged 15 to 24. It is a fashion conscious group. The members falling in the group always hanker after marks of distinctiveness to show that they are different from the others, and the varied dress patterns and designs satisfy their psychological urge.

At the other end of the yardstick of age appear the retired people aged, who constitute the segment with a consumption habit of their own. It is found a man's degree of acceptance of the new fabrics/varieties decreases as he advances in age, particularly beyond 50 in India. This may be because of (i) a changed look at the value of clothings, and (ii) the changes in the physique. Generally speaking, cotton has found a greater preference with an increase in the age, though a trend in the reverse has been recently observed in the case of pants.

While only 5% of the total population belongs to this category, the significant fact that age does influence the attitudes and the psychological climate of the population should not be lost sight of. Old age is a time of conservatism, not of adventure; it is a time of caution, when the yearning to try out new things and experience new sensations has largely burned itself out. It is a time when peace and stability are important than progress, for progress means change and the aged cannot logically expect a change in
position, physique or purse to be other than the worse. A large element of oldsters in a population thus seems likely to dapon its optimism and to make it more conservative and less receptive to new ideas and new products.

In short, the senior citizens of the country constitute a bloc to whom the textile mill managements may find it combursome—if not impossible—to market new varieties of the fabrics. The larger the relative and absolute growth in their numbers, the larger will be their dampening impact on new products generation and distribution and the greater will be the need to discover newer sales promotion techniques and approaches by the textiles marketing executives.

**Shifts in Age**

Every group of consumers has its own pattern and composition of cloth requirements. Therefore, the shifts in the age distribution of population results in changes in the nature and strength of the demand for the cotton fabrics which, in turn, influence the sales forecasts and the overall marketing strategies. These shifts not only involve the kinds of fabrics to be purchased but also the attitudes and habits influencing the buying behaviour/patterns. For instance, the college-going generation is a group which has

*Alexander, R.J. & Berg, T.L., Dynamic Management in Marketing, 1985, (p.33)."
developed a soft corner for the western style of dressing and dress materials, which influence their buying habits.

Nothing is static. A number of forces generate possibilities of pronounced changes in the age distribution of population. A comparison of the figures for the corresponding age-groups in 1961 and 1971 (vide: Table 2.5) shows that the two ends of the age distribution yardstick, viz., those under 14 and over 60 have accounted for increased shares of the total population. This needs a special attention from the sales people in the demand projection for textiles.

The improvement in the quality of medical services, supported by the spectacular 'miracle' medicine development and the use of labour saving devices in the fields and factories in both the urban and the rural areas would certainly cause a long-run increase in the proportion of the oldsters in the country and of their demand—quantitatively and qualitatively. So also there are all chances of the progressive contraction of the bumper baby crop. In Gujarat and in the other States, the Governments have undertaken a variety of measures under the Scheme of Family Planning, in a concerted manner. A 'magic' message has been spread in this regard, by the ruling party through the Camagata Maru All India Congress Conference and its 20-point Economic Programme. Its successful implementation is bound
to bring about a freeze-and-squeeze in the infant and children population in the coming years and compress the demand for cotton textiles materials for these segments. The birth-rate in Gujarat that was 34.3 in 1951 had declined to 22.2 in 1973 and the death-rate had gone down from 14.5 in 1951 to 7.6 in 1973. The efforts of the Government and the voluntary agencies will, in all probability, speed up the decline in the dependent infants and the school-going and boost up the rise in the dependent olders, with consequent demand twists.

The effects of age should also be studied from the viewpoint of the composition of a family with respect to the ages of the husband and the wife and/or the age of the head of the household as also of the presence or absence of child-children, the infant group. All these have much to do with the kinds and qualities of the fabrics that will be bought by the family. The head of the household aged 60 and above does, with his changed living pattern, exercise some influence on the demand structure of the cotton textiles bought for his family—usually a restraining one in terms of new designs and varieties. Even in the households with fashion-conscious heads below 25, the demand for fashioned cloth will be restricted to a few members

* Gujarat Rajya, Samajik Arthik Samiksha, 1974-75, (p.97).
because of either a shortage of cash flow or a small family. Again, with the increase in the size of a family without a corresponding increase in its earnings, demand shifts will occur from quality and fashion dress materials to inferior fabrics, though quantities may get inflated, to restrict the total value of purchases within the bounds of the budgeted outlays. The age of the female—the married woman—will also influence the buying habits and the demand for different types of textiles. The family unit in which the wife is under 35 years of age usually spends more of the family earnings and saves less than that in which the wife has crossed the age limit of 50 or so.

Population density

Man is a social animal. The need for division of labour forces people to live in groups. People prefer to stay in areas where they can live happily and comfortably. This human attitude has created clusters of population in certain parts of the country because all the regions are not endowed with equal resources. Migrations to more favourable places, too, have occurred. During the last few years, rapid growth in the population has increased its pressure on land as the latter has remained almost unchanged.

The density of population indicates the intensity and concentration of fabrics demand. If it is further analysed by various segments—age, income, sex, social class, climate,
etc.,—it would reveal the qualitative aspect of demand also. This helps marketing people in structuring and making effective their distributive machinery. Tables 2.6 and 2.7 present the figures (a) for 1961 and 1971 for Gujarat and India, and (b) for 1971 for all the Districts in Gujarat, respectively.

**Table 2.6**

<table>
<thead>
<tr>
<th>Census Year</th>
<th>Gujarat Density of Population (per sq. km.)</th>
<th>All India Density of Population (per sq. km.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1961*</td>
<td>110</td>
<td>134 (excluding Sikkim)</td>
</tr>
<tr>
<td>1971*</td>
<td>136</td>
<td>178</td>
</tr>
</tbody>
</table>

The density of population varies from State to State and from district to district even in the same State. In Gujarat, the decade 1961-71 had witnessed a 23.7% rise in it, meaning that the market for cotton fabrics should have received an upward thrust quantitatively on the whole.

The highest density of population is to be found in Kaira district (341) closely followed by Ahmedabad district (334) and the newly-born district of Gandhinagar (309). It


0 Government of Gujarat, Samajik Arthik Samiksha, 1975-76, (pp.27-29).
is the lowest (19) in Kutch district. The densely populated areas are chiefly those which are urban and sparsely peopled areas are mainly rural. The demand for fabrics in different
inhabitants so as to meet their demand for fabrics effectively. These influence the product lines and the product assortments of the mill enterprises and the retail outlets respectively.

The distribution implications of density of population are closely comparable to those of urbanisation, discussed later.

**Educational attainments**

The buying habits and the dress patterns have direct relationships with the levels of socio-cultural attainment. The spread of education is a prime contributory factor to growth. The progress of literacy and higher education have had a surprising amount of influence on social views about the desirability or otherwise of particular modes of dress. Persons having better educational attainment usually have different fabrics choice than those having no formal education. There is a close relationship between educational attainments and incomes generation; and, both jointly influence the demand. This presents difficulty in generalising as to whether a person uses a particular variety of fabrics mainly because of his educational achievements or the power of his purse.

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In fact, many persons who have achieved high economic status with less education are found to be using quality fabrics and fashionable variants. But where the question of a rational choice emanating from intellectual sophistication is concerned, people possessing higher qualifications do prove to be fashion-leaders. They have explicit preferences for western or oriental dressing styles. From among them, the gents working in Government offices and business units prefer to wear suits, coats, etc. made out of fine and superfine categories of pure cotton fabrics, mixed fibre fabrics or man-made fibre fabrics and use night dresses, etc. at home. The working wives and the ladies belonging to the families of white-collared people show a preference for pure cotton, pure silk, terylene and artsilk sarees and other garments. It is found that traditional businessmen and their employees still cling on to customary dhotis and kurtas, and the blue collared people as well as those with not much of formal education continue to wear the traditional convenient modes of dresses, mostly of coarse and medium A and medium B categories.

Table 2.3 reflects the progress of literacy in the country since 1901. While we have yet 'miles to go' in the words of Frost, the enlargement of the literate male and female population has begun having its imprint on the fabrics and fashions preferences of the population at large.
### Table 2.9

<table>
<thead>
<tr>
<th>Census year</th>
<th>Percentage of literate population to total population</th>
<th>Percentage of literate males to total male population</th>
<th>Percentage of literate females to total female population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1901*</td>
<td>5.35</td>
<td>9.83</td>
<td>0.69</td>
</tr>
<tr>
<td>1911*</td>
<td>5.92</td>
<td>10.56</td>
<td>1.05</td>
</tr>
<tr>
<td>1921*</td>
<td>7.16</td>
<td>12.21</td>
<td>1.81</td>
</tr>
<tr>
<td>1931*</td>
<td>9.50</td>
<td>15.59</td>
<td>2.93</td>
</tr>
<tr>
<td>1951*</td>
<td>16.67</td>
<td>24.95</td>
<td>7.93</td>
</tr>
<tr>
<td>1961</td>
<td>24.02</td>
<td>34.44</td>
<td>12.95</td>
</tr>
<tr>
<td>1971</td>
<td>29.34</td>
<td>39.51</td>
<td>18.44</td>
</tr>
</tbody>
</table>

Gujarat, with 35.79% of its total population being literate, is a little ahead of the all-India average for 1971. Table 2.9 gives further data about the number of students who had gone to the schools, the colleges and the other institutions of learning/training until 1974-75 as compared to the conditions in 1951-52 and 1961-62.

For the mill managements interested in earning handsome mark-ups through the development of new and finer varieties, the educated group is an excellent market target.

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* For undivided India.
0 Excludes Jammu & Kashmir.
Table 2.9

<table>
<thead>
<tr>
<th>Year</th>
<th>Primary (in '000)</th>
<th>Secondary</th>
<th>Higher Education</th>
<th>Special Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>1951-52</td>
<td>1242</td>
<td>190</td>
<td>17</td>
<td>71</td>
</tr>
<tr>
<td>1961-62</td>
<td>2524</td>
<td>410</td>
<td>54</td>
<td>260</td>
</tr>
<tr>
<td>1970-71</td>
<td>3439</td>
<td>786</td>
<td>155</td>
<td>188</td>
</tr>
<tr>
<td>1971-72</td>
<td>3587</td>
<td>822</td>
<td>168</td>
<td>123</td>
</tr>
<tr>
<td>1972-73</td>
<td>3748</td>
<td>848</td>
<td>130</td>
<td>125</td>
</tr>
<tr>
<td>1973-74</td>
<td>3973</td>
<td>880</td>
<td>195</td>
<td>127</td>
</tr>
<tr>
<td>1974-75</td>
<td>4017</td>
<td>900</td>
<td>210</td>
<td>129</td>
</tr>
</tbody>
</table>

Hence, they must watch these trends and make careful forecasts for this population segment. Again, the various layers of education and the size of students at each level indicate so many things to mills, as the colours and categories of fabrics for the uniforms, etc. also influence the demand structure.

The level of literacy also differs from State to State (being highest in Kerala: 62.42%) in the country and even among the districts in the same State. For example, in

* Source: Census of India, 1971, Series 1, Paper 2, Supplement.
+ Gujarat Rajya, Samajik Arthik Samiksa, 1974-75, (p.96).
x G.O.I., India, 1976, (p.52).
Gujarat, the literacy as per the 1971 Census, is the highest in Ahmedabad district, closely followed by the districts of Kheda, Gandhinagar, Vadodara, Surat, Rajkot and Mehsana. Panch Mahals and The Dangs are the most backward in this regard. An examination of the districtwise educational attainment will not only help the mills in determining demand but also in structuring their distributive machinery.

Since long, mills in Gujarat have a very large market for their coarse and traditional 'gamthi kapad' that satisfies the demand mainly from the farming, the artisans and the scheduled communities. The spread of education among these classes has begun having a pronounced influence on the demand structure as it exerts influence on their dress patterns and their fabrics preference. Thus, for example, an educated member of a tribal family will be found very much influenced by the city environment. This gets reflected in his own dress pattern, and that of his family's at a latter stage. The numbers of Scheduled Tribes and Scheduled Castes students are on the ascent (vide Table 2.10).

Thus, over 27 thousand youngsters will be overshadowed by the influence of the urban environment. The chain-impact of this is likely to be more pronounced on the Adivasis as most of them hail from the backward and interior parts of the State; and, barring a few of them who may still stick to preserve their age-old dress patterns and fabrics preferences
<table>
<thead>
<tr>
<th>Year</th>
<th>Scheduled Tribes</th>
<th>Scheduled Castes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960-61</td>
<td>202</td>
<td>1307</td>
</tr>
<tr>
<td>1961-62</td>
<td>231</td>
<td>1407</td>
</tr>
<tr>
<td>1962-63</td>
<td>353</td>
<td>1469</td>
</tr>
<tr>
<td>1963-64</td>
<td>414</td>
<td>1763</td>
</tr>
<tr>
<td>1964-65</td>
<td>535</td>
<td>2260</td>
</tr>
<tr>
<td>1965-66</td>
<td>745</td>
<td>2857</td>
</tr>
<tr>
<td>1966-67</td>
<td>1317</td>
<td>3793</td>
</tr>
<tr>
<td>1967-68</td>
<td>1544</td>
<td>4399</td>
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<tr>
<td>1968-69</td>
<td>1815</td>
<td>5501</td>
</tr>
<tr>
<td>1969-70</td>
<td>2499</td>
<td>6837</td>
</tr>
<tr>
<td>1970-71</td>
<td>2519</td>
<td>6832</td>
</tr>
<tr>
<td>1971-72</td>
<td>3363</td>
<td>7274</td>
</tr>
<tr>
<td>1972-73</td>
<td>4086</td>
<td>8897</td>
</tr>
<tr>
<td>1973-74</td>
<td>5312</td>
<td>12410</td>
</tr>
<tr>
<td>1974-75</td>
<td>8190</td>
<td>19167</td>
</tr>
</tbody>
</table>

including colour and design, the majority's family demand for cloth will be influenced by the urban culture. Thus, even in these communities, the better educated groups develop specialized tastes and fabrics preferences that ultimately provide the segmentation of very narrow and specialised marketing opportunities for mill managements.

Finally, whatever may be the sub-culture in the society,

the better educated groups are by definition more interested in new ideas. They, therefore, provide great opportunities to those mill managements which consider the development of new varieties of fabrics as the greatest profit contributor.

Economic activity—occupation

The total population can be divided in two broad categories—those of the workers and of the non-workers.

The fabrics preferences and the dress patterns of the workers are not uniform or similar; they are more or less related to their respective economic activity or kind of occupation. For example, the cotton fabrics of coarse and medium categories enjoy highest popularity with the farming class and the artisans. It has also gained popularity among industrial workers. On the other hand, the white-collar workers prefer to have finer varieties and mixed-fibre fabrics involving easy care. Some employers as well as jobs dictate the dress and fabrics patterns. Thus, a driver, a conductor, a peon, a pilot, a teacher in a basic school, a postman, a policeman, a doctor, a nurse, a butler in a restaurants, etc. are found when on duty, to be in particular dresses made out of prescribed kind and colour of materials. They also buy (non-uniform) other clothes for use outside the duty hours. Again, not only the kind of occupation or job but also the amount and regularity of employment are significant demand determinants.
The total, the worker and the non-worker populations of Gujarat in 1961 and 1971 as also the percentage break-ups of the major occupational groups among the workers in the two years are presented in Table 2.11 to help examine their impact on the structure of cloth demand in the State.

The Table shows that 53.32% and 43.12% of the total workforce was engaged in agriculture as cultivators in 1961 and 1971 respectively. This means that a sizeable portion of the population wears such cloth as will identify it as farmers. Agricultural labourers constitute the second big group that has its own fabric requirements as compared to those working in the other occupational groups. Also, the cloth has to be durable, utilitarian and relatively less costly.

It further reveals other features like the relative and absolute shifts in the occupations which have become pronounced during the decade. For example, there has been a relative and absolute decline in the farm population. During this decade it has gone down by more than 10% and the decrease is expected to continue because of the growth of towns and cities. In the State as also in the country as a whole, the decline in this group has been offset by increases in the numbers of the professional, the white-collar clerical and the factory operational employees owing to the gradually expanding industrial sector. The declines in some of the
Table 2.11

<table>
<thead>
<tr>
<th>Group</th>
<th>Gujarat</th>
<th>Gujarat</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Census 1961</td>
<td>Census 1971</td>
</tr>
<tr>
<td>%age</td>
<td>%age</td>
<td>%age</td>
</tr>
</tbody>
</table>


1. Cultivators 53.32 43.12
2. Agricultural labourers 14.77 22.48
3. Mining, quarrying, livestock, forestry, fishing, hunting, orchards, & allied activities 1.24 2.39
4. Household industry 6.56 2.82
5. In manufacturing other than household industry 6.33 9.25
6. Construction 1.06 1.43
7. Trade & Commerce 4.85 6.94
8. Transport, storage and communications 1.88 2.86
9. Other services 9.99 7.71

B. Non-workers: (1961: 12,158,762; 1971: 18,301,929)

Total: (1961: 20,633,350; 1971: 26,697,475) Total: 100.00 100.00

traditional occupational groups accompanied by expanded higher-income and urbanised groups do mean a favourable trend for those involved in cotton fabrics production and distribution; for, it will stimulate the demand for non-traditional and better varieties in which mills and the intermediaries earn relatively higher margins. This certainly does not mean that the mill managements can suffer from any complacency with regard to the needs of the farming community and the agricultural labourers who still together constitute 2/3rds of the total population.

**Rural-urban population**

The division of the consuming public between urban* and rural is also an important determinant of the structure of

---

*The criteria for the purpose of determining any area as Urban fixed in the 1971 Census were:

1. All places where there is a Municipal Corporation, or a Municipality or a Town Committee or a notified area or a Cantonment Board have been treated as urban areas.

2. The remaining places were recognised as enjoying urban characteristics and declared as Urban areas only if the following conditions were fulfilled:

   a) The estimated population at 1951 Census should be at least 5,000.

   b) The density of population per sq.km. should not be below 400.

   c) 75 per cent of the male working population should follow non-agricultural pursuits.

   d) In the opinion of the Director of Census Operations any other place where predominant urban characteristics are noticed.
demand for cotton textiles. There are typical variations in the consumption patterns, style preferences, buying habits and outlooks in the two cases owing to differences in cultural heritage, climate, topography, etc. The sociological pattern—family size, customs, etc.—among the rural people differ significantly from those of the city dwellers. The nature of occupation and the income derived from it also are related to the place—rural or urban—which the buyer inhabits. The fabrics consumption pattern of an individual is strongly affected by his neighbourhood and the local social group to which he/she belongs because, in the words of John Don, no man is an island entire of itself; every man is a piece of the continent, a part of the main.

The distribution of the fabrics users by urban and rural segments is shown in Table 2.12.

Table 2.12*

<table>
<thead>
<tr>
<th>Census Year</th>
<th>Gujarat Rural Population</th>
<th>Gujarat Urban Population</th>
<th>All India Rural Population</th>
<th>All India Urban Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1951</td>
<td>11834761</td>
<td>4427896</td>
<td>29864156</td>
<td>62443934</td>
</tr>
<tr>
<td>1961</td>
<td>15316726</td>
<td>5316624</td>
<td>360298168</td>
<td>78936603</td>
</tr>
<tr>
<td>1971</td>
<td>19200975</td>
<td>7496500</td>
<td>438855800</td>
<td>109094309</td>
</tr>
</tbody>
</table>

Thus, 72% of the total population of 2.67 crores lived

in the villages in Gujarat (as against 80% of the rural population in India). The Census Report also shows variations in the concentration of rural population in different districts.

Generally, people in the rural areas depend on agriculture and other related occupations, and show stronger preference for traditionally styled clothing, mostly of cheaper grades of fabrics than their counterparts in the urban areas. In some of the areas in the deep interior, the bulk of the population was observed to be 'not sensitive' to style changes. The qualitative and the quantitative influence of these two sectors on the aggregate demand structure also varies widely because of the variations in the patterns and the percentages of expenditure on clothing.

At present, despite the low level of the overall or the per capita consumption, the importance of rural sector in the total demand for cotton textiles is sizeable and, with the growth of the population in the backward districts of Gujarat, it is likely to grow spectacularly in the next few years.

The problems pertaining to rural distribution are also different from those obtaining in urban markets as, in the former, the local village shopkeepers, the itinerant retailers, the hawkers, and the pedlars carry on their business in the age-old traditional pattern.
Process of urbanisation

Just as the tastes of the buyers as regards the dress materials are not identical, the mills' product lines are also not identical. The mills which primarily cater to the urban markets must watch carefully the process of urbanisation for gearing their production programmes to the expanding markets of the neo-urbans. So also the mills concentrating until recently on rural-oriented production should plan for a switch-over—even if partial—to urban-oriented product lines if they want to save them from dwindling sales, mounting losses and ultimate disasters.

Apart from the vastness of the rural sector, there is the massive convulsion taking place in the shape of rapid urbanisation in and around the technologically developed/developing industrial centres. It is a two-pronged drive, so to speak: (a) Clusters of population migrate from the villages to the old cities and towns and the new-born industrial complexes for jobs and settlement. (b) People commute daily from their residences in the villages for their employment in the industrial and commercial enterprises. This continuing process exerts its influence on the rural folks and brings about a change in their attitudes, expectations, tastes and living habits which, in turn, get reflected in change-overs to newer dress materials and newer fashions, designs and patterns of fabrics. Table 2.13 is
The rate of urbanisation in Gujarat during 1961-71 was faster than the All-India average. Both of them were unprecedented in recent years. In Gujarat, the total urban population had gone up by about 270% during the first seven decades of the Century. During the decade 1961-71, the total population of Gujarat had increased by 29.35%, but the urban population had shown an increase of 41%. (The percentages of population as per the 1971 Census were—Gujarat, 23.08; All India, 19.91.)

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* Ibid., p.6.

Such a shift indicates better chances of demand for high priced cloth/fabrics where the mark up/margin on sale per transaction is greater than the sale per transaction of the cloth of inferior quality. Such shifts, if they result in greater concentrations of population in big towns, make it easier for mill managements to reach them and to distribute the fabrics either directly or through shorter channels of distribution; for, a retail outlet located in an urban area can have more calls of buyers or prospects per day than can a man operating in rural territory make on them. The operating costs are comparatively low. The gross miles to be travelled either by customers or by the representative/s of the retail trade are fewer, and the delivery distances are manageable and less expensive.

The concentration of this type makes mass distribution possible, particularly where there are better chances for departmental stores, super markets and large chains to grow. The prevalence of these mass retailing establishments facilitates mill managements to favour direct to traditional retail trade level marketing. This also creates an opportunity to get a fair share of the urban textiles market. In addition, this renders it possible to direct the use of various media of publicity and other sales promotion techniques like grand reduction 'sale's, exhibitions and demonstrations to larger aggregates of humanity. (Yes, with
suburban population growths, the scope of activities of the itinerant cloth retailers gets widened there.)

It should also be noted here that the proportion of rural and urban populations varies from district to district. It is the absolute numbers there that provide the actual and the potential demand pattern for different varieties of fabrics. Table 2.14 presents the figures based upon the 1971 Census.

The process of urbanisation has a great impact on the functioning of the distributive machinery of the mill managements and the distributors involved. The shifts of this nature facilitate the use of several media of sales promotion as the habit of reading news papers, journals and magazines, developed radio-broadcasting and the spread of respectability associated with new dress patterns is, though distinct, a cognate development of significance.

In brief, the marketing people must continuously review their distribution systems as the existing channels may be ineffective to changed demand structure.

Number of households

As stated earlier, the mill managements and the intermediaries must keep themselves informed of the rates of increase in population and other population characteristics, which are used as some of the bases of long-range forecasting.
of sales proceeds. This is particularly important in case of the wearable varieties (except industrial fabrics) of the cloth because clothing is not a joint requirement like furniture but is purchased on the basis of individual likes

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and dislikes. Of course, change in some population features also influence the demand for non-wearable cloth. But for such items, the number of households is also of great significance than the knowledge of the number of persons that affects the non-wearable cotton textiles. To that extent, there may be some change in the demand for curtains and other home furnishings.

(b) Sociological factors

Social classes/Social strata

The social class to which an individual or household consuming unit belongs exerts vital influence on the fabrics it buys and the buying pattern. In all the countries, the lines of social classes are drawn; every society classifies its members according to some social hierarchy. They mark differences in norms of convention, codes of behaviour, attitudes towards such things as education and occupation, political theories and loyalties; in short, people's pattern of thought, emotion, and behaviour. Along with these, the stickiness to preserve their own culture, the dress pattern, etc., in turn, generates influence on their way of life. All these spill over the field of demand for cloth also.

* Usually a family, but not always a family.
* Alexander, R.S. & Berg, T.L., op.cit., p.56.
Again, most of the countries of the world divide the entire society into different segments on the basis of various viewpoint such as income, education, etc. Here, instead of following the traditional way of segmenting society, viz., the upper-upper, lower-upper, upper-middle, lower-middle, upper-lower, lower-lower classes, attempt has been made to examine the demand for clothes of groups of buyers, as generated by the birth-based socio-economic status, viz., the Scheduled Tribes, the Scheduled Castes and the rest of the population. The Census of population invariably accept this basis for presenting much of the demographic data.

The distribution of population on this basis is presented in Table 2.15.

As per the 1971 Census, in India, nearly 1/5th of the total population consisted of Scheduled Tribes & Scheduled Castes communities. Gujarat ranked among all the states in regard to these two categories of people. Table 2.15 indicates that 13.99 and 6.84% of its population consisted of Scheduled Tribes & Scheduled Castes populations respectively.

These two sections of the total population backward, underdeveloped and poor in terms of their social and economic conditions. Hence, the cloth consumption—in both quality and quantity—would naturally be inferior and lower per
### Table 2.15

(Population in '000)

<table>
<thead>
<tr>
<th></th>
<th>Gujarat</th>
<th></th>
<th></th>
<th>All India</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>S.T.</td>
<td>S.C.</td>
<td>Other</td>
<td>Total</td>
<td>S.T.</td>
<td>S.C.</td>
</tr>
<tr>
<td>S.T. Population</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1961*</td>
<td>2754</td>
<td>1367</td>
<td>16512</td>
<td>20633</td>
<td>30130</td>
<td>64449</td>
</tr>
<tr>
<td></td>
<td>(13.35)</td>
<td>(6.06)</td>
<td>(80.59)</td>
<td>(100.00)</td>
<td>(6.95)</td>
<td>(14.68)</td>
</tr>
<tr>
<td>1971°</td>
<td>3734</td>
<td>1825</td>
<td>21138</td>
<td>26697</td>
<td>38015</td>
<td>79996</td>
</tr>
<tr>
<td></td>
<td>(13.99)</td>
<td>(6.84)</td>
<td>(79.17)</td>
<td>(100.00)</td>
<td>(6.94)</td>
<td>(14.60)</td>
</tr>
</tbody>
</table>

S.T. = Scheduled Tribes; S.C. = Scheduled Castes.

° Census of India, 1971, Series 1, Part I of 1972, (p.3).
family unit than that of the family units belonging to the other than SC & ST communities.

Out of these two communities, the percentage of SC population is the highest (10.93) in Ahmedabad district, closely followed by Surendranagar district (10.39). It is, however, relatively low in the tribal districts of the Panch Mahals, Vadodra, Bharuch, Surat, Valsad and The Dangs. This has a vital consequence. As the majority of them live in non-backward areas, they are found to be influenced by the dress patterns of the other communities. As against this, nearly 38 lakhs of ST population comprising of 19 subcastes each having a peculiar dress pattern, habits, culture, etc. were residing mainly in the backward regions, the eastern tract of Gujarat made up of hilly and forest areas. Most of these population provide very good market for coarse cloth, 'gamthi kapad'. Thus any increase or decrease in the numerical strength of this category of population and the change in their status would ultimately affect the demand for cloth. Not much attention seems to have yet been paid to this aspect. Hence, an attempt is made here to examine the demand for cloth of this community.

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0 For example, Bhil, Bhilara, Dhodia, Gamit, Konkani, Dubla, Dhanka, Tadvi, Davoha, Rathva, Talavia, Vasava, Varli, Vitolia, Kotwalia, Chaudhri, Naika, Kathodi and Halpati are found inhabiting different districts.
The demand for textiles from a section of this aboriginals in the past was completely different from that at present in the country. Even in the state of Gujarat, some tribes were almost nude except the wearing, of a 'lungoti' (loin cloth with a flap in the front) mostly in the backward districts of the Panch Mahals, The Dangs and Bharuch. In those days, wearing of less cloth was associated with a belief and superstition in a few sections, and the 'lungoti' became the constant companion of men. Even today, there are some tribes in the most interiors, such as some areas of the Panch Mahals and The Dangs, wearing a 'lungoti', whereas their women folks use a short saree, called 'kapra' in their dialect. However, on ceremonial occasions their dresses are different—every youth has a separate dress for dance which consists of a bigger dhoti and bundi; every young woman reserves a better and colourful saree, generally red or technicolour for the community group dances.

But there is a section of the community, the more civilized among them, who now wear dhoti, shirt, bundi, turban/fadiyu. Most of these requirements are satisfied with the coarse cloth or, sometimes, with second hand/used/ 
/uterela kapada' from 'pyala barniwalla' because of their low incomes. The females are found fully covered even in the wilder tracts. The ST population living a little nearer to the developed areas or in areas inhabited by civilized
persons have been greatly influenced by their dress patterns. But, in the interior parts and in the forest areas, women wear long strips of cloth commonly known as 'lugdu', tied round the waist, stretched across the breast and fixed in at the back end by a knot.

Though some of them are still in favour of preserving their own culture and dress patterns, those of quite a large number of families are influenced by the presence of forest officials, forest contractors, money lenders, etc.

A village school teachers' insistence on particular dresses also creates a desire among them to wear cloth more elaborately. Thus, gradually, the effects of culture-contact are discernible in the dress patterns of this community in various regions. These are observable today in their purchases of coarse cloth and ready-made garments at the weekly markets—'hatwada's—comparable to those of the other Hindu villagers.

Over dozens of respondents in my case study of this community informed me that non-wearable fabrics such as blankets, other woolen clothes and house furnishings did not form an important part of their total demand for fabrics. Because some of the groups like vitolia or vansfodia in the State, particularly in the most backward regions, sleep round the burning fire during the nights, they rarely use anything except a 'pichhodi' (chaddar), once in a while, for protection
against bad weather. And, for covering their bodies during
day-time, too, they use scanty clothes.

As in most of the other States in India, every district
and taluka in Gujarat has some aboriginal population, though
these aboriginals are not distributed evenly all over the
State. (Vide: Table 2.16).

Table 2.16*

<table>
<thead>
<tr>
<th>District</th>
<th>Total population</th>
<th>Tribal population</th>
<th>Percentage ST population to district population</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Dangs</td>
<td>94,135</td>
<td>88,028</td>
<td>93.5</td>
</tr>
<tr>
<td>Valsad</td>
<td>14,23,742</td>
<td>7,76,215</td>
<td>54.3</td>
</tr>
<tr>
<td>Surat</td>
<td>17,85,924</td>
<td>8,27,682</td>
<td>43.9</td>
</tr>
<tr>
<td>Bharuch</td>
<td>11,09,601</td>
<td>4,86,901</td>
<td>43.8</td>
</tr>
<tr>
<td>Panch Mahales</td>
<td>13,43,804</td>
<td>7,12,713</td>
<td>39.5</td>
</tr>
<tr>
<td>Vadodara</td>
<td>19,80,065</td>
<td>4,73,117</td>
<td>23.9</td>
</tr>
<tr>
<td>Sabarkantha</td>
<td>11,37,637</td>
<td>1,73,804</td>
<td>15.1</td>
</tr>
<tr>
<td>Banaskantha</td>
<td>12,65,383</td>
<td>77,758</td>
<td>6.1</td>
</tr>
<tr>
<td>Kutch</td>
<td>8,49,769</td>
<td>40,341</td>
<td>4.7</td>
</tr>
<tr>
<td>Kheda</td>
<td>24,51,337</td>
<td>25,275</td>
<td>1.0</td>
</tr>
<tr>
<td>Ahmedabad</td>
<td>29,10,307</td>
<td>20,998</td>
<td>0.7</td>
</tr>
<tr>
<td>Surendranagar</td>
<td>8,45,464</td>
<td>4,612</td>
<td>0.6</td>
</tr>
<tr>
<td>Junagadh</td>
<td>16,56,677</td>
<td>8,305</td>
<td>0.5</td>
</tr>
<tr>
<td>Mehsana</td>
<td>20,92,468</td>
<td>9,138</td>
<td>0.4</td>
</tr>
<tr>
<td>Jamnagar</td>
<td>11,11,343</td>
<td>2,711</td>
<td>0.2</td>
</tr>
<tr>
<td>Gandhinagar</td>
<td>2,00,642</td>
<td>406</td>
<td>0.2</td>
</tr>
<tr>
<td>Rajkot</td>
<td>16,24,072</td>
<td>677</td>
<td>0.04</td>
</tr>
<tr>
<td>Bhavnagar</td>
<td>14,05,285</td>
<td>182</td>
<td>0.01</td>
</tr>
<tr>
<td>Amreli</td>
<td>8,49,730</td>
<td>321</td>
<td>0.04</td>
</tr>
</tbody>
</table>

|                    | 2,66,97,475      | 37,34,422         | 13.99                                           |

This community, in a large measure, is found geographically concentrated in the hilly tracts of very poor soil, covered with forests, though with some natural resources.

Out of the total ST population in the State, 97.29 percent is concentrated only in 8 districts, viz., Surat, Valsad, Panch Mahals, Bharuch, Vadodara, Sabarkantha, The Dangs and Banaskantha. Whatever may be the social and moral implications of this concentration, it tends to create a special tribal market for cotton fabrics.

But, the ST population has been fluctuating practically every year for many known reasons, and the numerical growth will influence the demand for 'Gamthi kapad' as quite a large majority of them use traditionally coloured coarse cloth, and the knowledge of their greater concentration in a few regions or districts would help devising different methods of distribution as also company demand projections.

In short, (i) in planning the types of cloth to be produced and in devising the distribution system at the mill level, and (ii) in deciding the product assortment—the varieties—of the intermediaries, the composition of the various classes of the population and their segmental demand for cloth need to be taken into account.

Religious beliefs and cultural inheritance of habits,
customs, traditions and superstitions are significant
determinants of demand for different types of cloth and
contribute to the segmentation of the cloth market. For
example, people professing Islam prefer to wear lungi, kamij,
kurta, frock, dupatta, salwar, etc. mostly of dark-green,
yellow and red colours and made out of shining cloth.
Religion usually exercises a restrictive or negative rather
than a positive or expansive influence upon the demand of the
consumer group it affects.

The population in all States in the country, from this
viewpoint, is highly heterogeneous. Gujarat (and the country
as a whole) can be described as a melting pot of cultures and
religions. The breakup of the population in Gujarat
according to principal religions as per the 1971 Census is
presented in Table 2.17.

It would be seen from the Table that there is a pre-
dominance of Hindus constituting 39.28 percent of the total
population. The Muslims form the next largest group with
Table 2.17

<table>
<thead>
<tr>
<th>Sr. No.</th>
<th>Religion</th>
<th>Number of persons</th>
<th>Percentage to total state population</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hindus</td>
<td>23835471</td>
<td>89.28</td>
</tr>
<tr>
<td>2</td>
<td>Muslims</td>
<td>2240055</td>
<td>8.42</td>
</tr>
<tr>
<td>3</td>
<td>Christians</td>
<td>109341</td>
<td>0.41</td>
</tr>
<tr>
<td>4</td>
<td>Sikhs</td>
<td>18233</td>
<td>0.07</td>
</tr>
<tr>
<td>5</td>
<td>Jains</td>
<td>451578</td>
<td>4.69</td>
</tr>
<tr>
<td>6</td>
<td>Buddhist</td>
<td>5469</td>
<td>0.02</td>
</tr>
<tr>
<td>7</td>
<td>All others</td>
<td>28328</td>
<td>0.11</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>28697475</td>
<td>100.00</td>
</tr>
</tbody>
</table>

SCs to adopt Christianity. This process has been responsible for a metamorphosis in the dress patterns of both men and women undergoing conversion. (Of course, the concerted drive for the economic amelioration of the poorer sections, the promulgation of law making untouchability an offence and the constructive steps taken since the proclamation of emergency and the Prime Minister's 20-point programme have been stemming the tide of proselytization.)

The customs, traditions and habits, which are more closely related to religions, too, have their own influence on the demand curves. The force of custom and tradition governs a major part of family purchases as to the kinds of

cloth, time and place of purchase. The village population is generally inclined to adhere to the long standing custom of buying variety cloth in relatively large quantities after the harvest. Also, the practice of purchasing cloth during important festivals is widespread, though not universal. Diwali, Ramjan-Id, Christmas, Doorga Pooja days, etc. provide for various trade level intermediaries the peak periods of shopping seasons. The knowledge of such extraordinary demand boosts are of great help to the distribution personnel. They should not only view a particular community as an entity by itself, but also visualize the degrees of cross-fertilisations of habits and preferences among the people professing different religions.

Fashions and the cycling of fashions

A particular style, when accepted in the opinion of a (large) segment of the society, becomes a fashion. Fashion is not just a 'prevailing custom', especially in clothing. It is a force that influences what we wear, what we eat, where we live, how we travel, what we do for amusement. Because of the popularity it places first on one product and then on another it stimulates business. With its aid the standard of living moves continually higher. It is timeless. Like monsoons, fashions have a way of changing in cycles. An idea attains popularity, rises, fades out and returns,
refined into a slightly altered form.

In clothing, of late, the change in style has been frequent and at an accelerating pace because of numerous factors including the revolution in transportation and communication.

This means that for particular sections of the society, cloth/clothing has become something more than a bare necessity. People like new dress patterns to 'look' distinctive. Fashion satisfies this urge. The Sanskrit shloka "kesane kesane yad navtamupaiti tadev roopam ramaniyatayah" verily reflects the spirit of fashionhood. British wit goes thus: Fashion is a form of ugliness so intolerable that we have to alter it every six months!

The changes in fashion, as a reflection of the opinion of a group of the textiles users, exert considerable influence on both—quantitative and qualitative—aspects of the demand structure; e.g. mini-skirts, bell-bottom, maxi, lungis, narrow, broad or elephantine sleeve-pants, sports type netted jackets. This, in turn, (a) expands or contracts the cloth requirements quantitatively, and (b) means qualitative changes in designs, colours, textures, etc. Wearing of scanty dresses and profuse garmentation have an inverse ratio of


© The beauty of charm lies in the newness that is attained every minute.
In the 14th century, both religion and society expressed their disapproval of wearing too large-size garments. During those days, it was said by one of the saints that it was a sin to make the cloth costly through demand expansion by wearing bigger-size dresses. Economising it for religious utilisation could be of help to the poor and needy section of the society.

The Gandhian approach in the first few decades of this country was similar in terms of simplicity and austerity in the consumption of cloth. However, the age of value judgements seems to have been over for long. The fashion consciousness now is more or less the same all over the country.

Basically ladies are more fashion-minded than males. The Indian women, supported by the crumbling of the caste system and the disintegration of the joint family, have been becoming more and more fashion conscious, especially in the urban areas.

The increasing spread of education, breaking of the bonds of conservatism, greater dependence on white collar jobs as in the western countries and the trend towards the

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* Gujarat Samachar, 19-1-1976.
* Mehta, J.D., op.cit., p.169.
disintegration of joint families have resulted in greater freedom to the young married girls to mix with one another and carry a message of newer fashions all around.

The increasing number of girls studying in the colleges—and even in the high schools—provides an extension of the focal points of group contacts from which the fashions begin their circular itinerary—via the working wives.

The shifts in the occupational pattern have been generating their impact on the demand structure; for, along with the cloth consumption pattern, the buying habits including the timings and regularity of purchases also undergo changes. Thus, for instance, major cloth buying is done by the farmers generally after harvesting, whereas most of the salaried persons in the industrial and the commercial centres make purchases during the first 5-6 days after the 'pay day's, though credit also frequently plays a vital role.

**Working women and social emancipation**

In an orthodox society, the housewife's place, in a large measure, is in the home with her children and shopping by them is considered an excursion, a change from the household routine. Indian society which was orthodox in the main has been witnessing a rapid transformation and the women are reaping the fruits thereof as regards both their rights and responsibilities. The spread of education and the family planning programme have been having a profound impact in
More and more married women have been joining the existing workforce. The strength of the working wives and the unmarried women having some exposure to collegiate education and entering the arena of white collar occupations like those of typists, receptionists and clerks in the private, the cooperative and the public sectors including Government departments is rising year in year out. Women have been increasingly taking up jobs which formerly were considered to be the monopoly of the males.

In Gujarat, as per the 1971 Census, out of 8395546 total workers, 1322989 were women workers engaged in the nine types of the major economic-activity groups as explained earlier under the heading 'economic activity'.

The U.N.O. member countries including India very recently celebrated the 'International Women's Year' and a number of steps have been taken to improve the social status of women. This slow and silent revolution will bring in more and more women within the orbit of the employed force.

The working women generally do not find enough time to wash their clothes as also of their family members. Also, they have to fashion their employment and social personalities. These have affected their fabrics preferences and dress patterns. The cloths such as wash-and-wear and mixed fibre fabrics attract their choice. (They are initially
expensive but have low washing and maintenance costs and are
time-saving.)

The working women always dress differently—and,
effectively—when employed, which influence the demand for
fashion dress materials of finer fabrics; and, in families
where their incomes generate surpluses, for improving their
qualitative standards of living, the added incomes stimulate
their diversion to the purchases of more furnishings—bed sheets,
towels, napkins, curtains, pillow covers, mattress covers,
carpets and other draperies.

The influence of this group on the demand structure for
fabrics, in turn, has a tremendous and complex effect on the
distribution structure, too. Because the time available to
these busy women, either at home or for shopping will be
comparatively limited, their buying pattern and behaviour gets
tilted in favour of bulk or less frequented. This is one of
the factors responsible for (i) the growing tendency of
'shopping under one roof', which provides further scope for
the departmental stores to grow, particularly in cities,
(ii) making the evenings busy for retail outlets, and
(iii) motivating a few shop-keepers to keep open even on
Sundays.

(c) Economic factors

Disposable income

Existence of people alone do not make market or determine
demand; they must possess disposable incomes. Also, the willingness to buy and the capacity of the mills to deliver the goods are essential for converting consumer desires into effective demand.

Incomes are a significant source of purchasing power, and any change in the quantum/size or its distribution exerts a noteworthy influence on the strength of the demand for cotton textiles. In other words, the per capita income of a population and the differences in incomes of different consuming groups explain the structure of demand and the differences in the quantity and quality of the fabrics used.

The per capita income provides a global indicator of the total purchasing power in the hands of a community. Table 2.18 presents the annual figures of the per capita income of the Indian population and the per capita availability of cloth—cotton and man-made it, since 1960-61.

The Table shows that the per capita income had risen by 11.47 % in 14 years. There were wide variations in the incomes of different persons in the country as also in Gujarat. Gujarat is having a better growth—industrially and in agriculture—and incomes have been improving. Even then, there are marked disparities in the incomes in the urban and rural market-segments. This obviously influences the buying habits of cloth consumers which differ considerably from region to region.
Table 2.18

<table>
<thead>
<tr>
<th>Year</th>
<th>Per capita income (at 1960-61 price)</th>
<th>Per capita cotton cloth availability (metres)</th>
<th>Per capita man-made fibres cloth availability (metres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960-61</td>
<td>305.7</td>
<td>13.8</td>
<td>1.2</td>
</tr>
<tr>
<td>1961-62</td>
<td>309.9</td>
<td>14.3</td>
<td>1.2</td>
</tr>
<tr>
<td>1962-63</td>
<td>308.2</td>
<td>14.4</td>
<td>1.2</td>
</tr>
<tr>
<td>1963-64</td>
<td>319.3</td>
<td>14.7</td>
<td>1.2</td>
</tr>
<tr>
<td>1964-65</td>
<td>335.1</td>
<td>15.2</td>
<td>1.6</td>
</tr>
<tr>
<td>1965-66</td>
<td>310.9</td>
<td>14.7</td>
<td>1.7</td>
</tr>
<tr>
<td>1966-67</td>
<td>308.2</td>
<td>14.0</td>
<td>1.7</td>
</tr>
<tr>
<td>1967-68</td>
<td>328.4</td>
<td>13.6</td>
<td>1.7</td>
</tr>
<tr>
<td>1968-69</td>
<td>331.7</td>
<td>14.4</td>
<td>1.9</td>
</tr>
<tr>
<td>1969-70</td>
<td>343.1</td>
<td>13.6</td>
<td>1.8</td>
</tr>
<tr>
<td>1970-71&lt;sup&gt;0&lt;/sup&gt;</td>
<td>351.8</td>
<td>13.6</td>
<td>1.7</td>
</tr>
<tr>
<td>1971-72&lt;sup&gt;0&lt;/sup&gt;</td>
<td>348.4</td>
<td>12.4</td>
<td>1.7</td>
</tr>
<tr>
<td>1972-73&lt;sup&gt;0&lt;/sup&gt;</td>
<td>337.4</td>
<td>13.2</td>
<td>1.6</td>
</tr>
<tr>
<td>1973-74&lt;sup&gt;0&lt;/sup&gt;</td>
<td>340.1</td>
<td>12.1</td>
<td>1.5</td>
</tr>
</tbody>
</table>

Again, the consumers do not spend their entire incomes on purchasing goods and services. The propensity to save is a vital determinant of disposable incomes. And, it is the degrees of rises in disposable incomes that will act as stimulants of the demand for all types of goods and services including textiles. Growing economic prosperity, thus,

* Vyapar, Dipotsavai Ank, 1975, (p.9).
0 Estimated.
becomes a promising feature.

Similarly, the incomes that the consumers expect to receive shortly also have some bearing on their present spending plans. Again, creditworthy customers command greater purchasing power. The facility of consumer credit or credit sales augments the current demand for cloth. For example, most of the families from the agricultural sector usually buy cloth in lots on credit and make payment after the harvesting season when their produce gets paid for. They make fresh purchases after full or part payment of the part dues. The prices charged are comparatively high but it is a chain deferred payment sales consequent upon the seasonality of agricultural incomes.

The per capita income—as also its distribution on the different items of the cost of living index—have a significant effect on fibre preference. Generally, increased income is likely to be spent on clothing, next to foodgrains. Food, which a few months back was a major charge on the family budget, has been cheaper now and the released extra income can be devoted to the purchase of fabrics. It is not impossible that this may have an adverse effect on the demand for cotton fabrics because of its diversion to man-made fibre fabrics. The figures in Table 2.13 do go to show that the consumption of man-made fibre fabrics has witnessed a gradual upswing along with the increase in the per capita
income of the Indian population.

Improved economic environment may also create a progressively increasing demand for better varieties of cotton fabrics in substitution of that for the grey fabrics. This may not, however, be always true. For example, in the case of the people belonging to some communities like Marwaries, Sindhis, Adivasis from some of the backward districts like the Panch Mahals and Gurkhas migrating to the industrial centres in Gujarat, additional incomes do not get reflected in the structure or composition of their purchases.

**Discretionary Income**

Increases in real incomes and consumer expenditures have, of late, been the order of the day for numerous families that are found to have been making discretionary purchases after satisfying the basic requirements of food, clothing and shelter. The discretionary purchases generally include durable and superior quality articles of luxury and comfort. These, supported by rising discretionary incomes, offer possibilities for the cotton fabrics market, too. A family spends such income for purchasing extra pants, shirts, sarees, blouses, evening and night dresses, leisure wear, sport clothes, more home furnishings and the like.

**Income distribution**

The demand for cotton textiles is influenced by the
manner in which increased incomes are distributed among people of different income-groups and regions. Planners talk about the economic progress and present estimates regarding the possible rises in incomes. But this does not clearly indicate as to which sections will be benefitted and to what extent. Knowledge about the relative and absolute shifts would help in forecasting the change in the demand structure as also the quantitative and qualitative cloth requirements more precisely.

Indian economy is undergoing a number of significant changes. There is a tremendous growth of population, resulting in an increase in the per capita consumption of cotton fabrics. The general economic progress of the country provides a further upward shift in it and calls for additional supplies of cotton fabrics of different categories—ranging from coarse to superfine. Therefore, the mill enterprises and the textiles traders must consider this matching function as their primary function.

**Behavioural factors**

There are certain aspects which affect the behaviour of buyers of cotton textile fabrics and, in consequence, the structure of demand.

**Women buyers**

Whether it is a male or a female who buys makes a
Men in society, as 'kartas' of the average family unit or as individuals are comparatively more conservative than women in the details of their ordinary daily lives. Women, in general, go in for new styles of dress for themselves and the other family members. In cases where men do make purchases, they usually bring the items—pieces of cloth, sarees, etc.—from the retailers whom they know, on 'Jangad sale' basis, for ultimate selection by women at home.

Usually women make most of the decisions about the purchases of the children's clothings. Here also their way of looking at a particular garment or a piece of cloth would probably differ from the tastes and likings of the male members.

In the rural areas, on the other hand, one would find quite large numbers of families in the upper castes where men had an upper hand in the purchase of fabrics, while in some nomadic tribes like 'Bharwad's and 'Gopalak's ('Rabari's), it is the women who buy almost all clothing requirements of the family including those of the males.

Of late, the role of women as buyers of the family requirements of fabrics is steadily rising and their influence is expected to increase because of the changing scene of social environment.
Status symbols

Most of the people are status-oriented. The status gets expressed through the use of different distinctive items. The items that have a status value for one family unit or an individual may not have it for others. Again, the values of items as status symbols also vary temporally and spatially. As for the clothing and furnishing, those who can afford to maintain their status go for finer varieties as well as silk and other non-cotton fibre fabrics.

Tailors

A large majority of the tailors interviewed preferred cotton fabrics produced by mills rather than materials like khadi and handlooms and, in their opinion, mill-made cotton fabrics constituted about 90 percent of their profits. Making of clothes from khadi was found by them to be less remunerative.

In a country like ours, where ready made garments constituted hardly 1% of the total output, the advice of tailors carries weight with the fashion world. The resourceful among them exercise great influence on the extent and the pattern of consumption of cotton textiles. Tailors are found making continuous efforts on style development and pattern formation. Fashion books and magazines like Femina and Eve's Weekly, customers' suggestions and their own
creativity, are the most important sources of fashion ideas for them. The tailors are particularly important in the marketing of fabrics for wear by adult males and juvenile consumers.

In spite of their role in the distribution of fabrics, the mill managements and the distributive intermediaries have yet not given them due importance. Planned efforts at tailor education and assistance to them in their job of handling textiles goods and creation of fashion consciousness among the fabrics users by the marketers would be a new direction for sales promotion.

Films

The frequent visits to movies have been stimulating the ideals and the vision to large segments of population in the matters of dresses. From a small industry catering earlier to an exclusive social class, the cinema industry has come to cater to an yearly attendance of lakhs of people in the country. It covers huge blocks of people in Gujarat and the increasing number of theatres in all districts except the Dangs indicates their steadily growing interest in films. The film actors and actresses, making lavish use of the details of the modes of dresses, act as fashion creators and fashion leaders. Their influence is much stronger and probably of more permanent significance in respect of the feminine attire and on the fashion-minded youngsters. A
number of respondents considered the film industry, responsible for the growing sophistication of the population in clothing and furnishing.

**Environment**

India is a vast country and climatic differences in different parts make it necessary to provide fabrics of different types to offer to human beings against the vagaries of nature. Again, abnormal movements in the climate cycles have, of late, been the order of the day in Gujarat. Thus, people must cover themselves with warm clothing when it is cold and with light clothing when it is warm, and they have to adjust themselves to the changing environment to face seasonal changes. This affects both their willingness and opportunities to buy. Psychologists support the popular assumption that bad weather is emotionally depressing to many persons and so tends to dampen their willingness to purchase. Thus, in winter, the desire to wear the woolens causes a curtailment in the purchases of cotton fabrics. Thus, climate exercises a profound influence (a) on the demand structure of cloth, (b) on the mill management's product decisions and product assortments and, (c) on the inventories to be kept by the intermediaries.

There is also the non-climatic environ which has its impact. Thus, fashions in our country travel from foreign lands through imported dress materials or ideas. The former would curtail the demand for India-made textiles to that extent. Similarly, the spread of the ethos of fashion-mindedness among the rural buyers affects the product assortments of the retail outlets in the concerned regions. Advertising, propaganda and sales promotion efforts through different media, salesmen and fashion shows/parades also mould the environment.

The rate at which the fashion change is registering a momentum in the State (and the country) needs serious consideration. The growing selectiveness on the part of cloth buyers irrespective of the prices and sophistication have been rapidly replacing the conservatism of the pre-1947 dress patterns. The winds of change suggest that the established patterns of dress sanctioned by customs and supported by consumption habits will increasingly be liable to variation.

The mill managements and the intermediaries must carefully watch the changes that are taking place in the environment.

Calamitous events

Factors such as failure of the monsoons, famine and draught conditions, floods, locusts and pests, external
aggression and internal disturbances like 'Roti Ramkhan' in Gujarat, develop stresses and strains that ultimately get reflected in the distribution of cotton fabrics. In such times the purchasing power of a common buyer contracts and non-dress material items of obligatory expenses like those on food, house rent, school fees and travelling have to be given a priority. Though temporary in character, such calamities bring about quantitative and qualitative changes in the demand for textiles. And, unfortunately, they have been frequent during the recent years keeping the marketers of cotton fabrics on their tentacles.

**Intra-company factors**

So far we have examined the extra-company forces—demographic, economic, sociological, and psychological—that constantly interact upon the demand for cotton textile fabrics and are generally uncontrollable. There is the other set of intra-company controllable forces generally put in motion by the mill managements and their field organisations, the distributive establishments. Some of them are changes in prices, introduction of new and finer varieties of the cloth, and aggressive promotion (strategy). Unfortunately, it is difficult to separate and quantify the effects of each of these factors. A few evidences are examined hereafter, which indicate that they also generate changes in the demand structure from the suppliers' end.
Technological progress

(i) Man-made fibre fabrics

The demand for textiles is changing in consequence of the commendable innovation in the field. Though all sections of the Gujarati society, in both urban and rural areas, had overwhelmingly voted in favour of the use of cotton fabrics, the non-cotton and man-made fabrics have, particularly in the last two decades, made substantial inroads in the demand arena for the textiles market. (Vide Table 2.19).

Till about 1950, the clothing requirements in India were almost wholly met by cotton fabrics. Since then, however, the demand for man-made fibre fabrics has been continuously rising, while its per capita consumption has gone up from 0.92 metres in 1953 to only 1.36 metres in 1974, in absolute terms, the rise has been of the extent of about 109% during 16 years. In fact, the artificial fibre fabrics have cut off a big slice from the expanded gross market for fabrics.

The ATIRA study conducted to know the trend in fabrics preference among the different categories of the consumers in Gujarat also disclosed that the consumer preference has undergone considerable change in the last 10 to 15 years in favour of non-cotton and synthetic fabrics.

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* HCABR, Demand for Man-made Fibres in India, 1970, (p.3).
9 ATIRA, Results of Consumer Panel,—ATIRA Publication.
Table 2.19

<table>
<thead>
<tr>
<th>Year (in millions)</th>
<th>Estimated mid-year population</th>
<th>Availability of man-made fibre fabrics for home consumption (in million metres)</th>
<th>Per capita availability (metres)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1963</td>
<td>414.16</td>
<td>392</td>
<td>0.92</td>
</tr>
<tr>
<td>1969</td>
<td>423.12</td>
<td>405</td>
<td>1.15</td>
</tr>
<tr>
<td>1960</td>
<td>422.56</td>
<td>520</td>
<td>1.20</td>
</tr>
<tr>
<td>1961</td>
<td>442.21</td>
<td>509</td>
<td>1.15</td>
</tr>
<tr>
<td>1962</td>
<td>451.73</td>
<td>527</td>
<td>1.17</td>
</tr>
<tr>
<td>1963</td>
<td>461.54</td>
<td>574</td>
<td>1.24</td>
</tr>
<tr>
<td>1964</td>
<td>471.63</td>
<td>767</td>
<td>1.63</td>
</tr>
<tr>
<td>1965</td>
<td>482.02</td>
<td>833</td>
<td>1.73</td>
</tr>
<tr>
<td>1966</td>
<td>492.68</td>
<td>812</td>
<td>1.65</td>
</tr>
<tr>
<td>1967</td>
<td>503.63</td>
<td>879</td>
<td>1.74</td>
</tr>
<tr>
<td>1968</td>
<td>514.87</td>
<td>976</td>
<td>1.90</td>
</tr>
<tr>
<td>1969</td>
<td>526.43</td>
<td>943</td>
<td>1.79</td>
</tr>
<tr>
<td>1970</td>
<td>539.31</td>
<td>921</td>
<td>1.71</td>
</tr>
<tr>
<td>1971</td>
<td>550.24</td>
<td>948</td>
<td>1.72</td>
</tr>
<tr>
<td>1972</td>
<td>561.87</td>
<td>995</td>
<td>1.69</td>
</tr>
<tr>
<td>1973</td>
<td>573.61</td>
<td>839</td>
<td>1.46</td>
</tr>
<tr>
<td>1974</td>
<td>585.70</td>
<td>797</td>
<td>1.36</td>
</tr>
</tbody>
</table>

Note: Figures in column 3 represent total cloth produced in the mill and the decentralized sectors plus actual imports minus actual exports of cloth.

The information collected from the respondents living in cities and towns, shows that in the chief garments—shirts, pants, coats, etc.—possessed by the males, as many as consisted of man-made fibre fabrics, while that in the chief garments—sarees, blouses, petticoats, etc.—possessed by the females, the non-cotton fabrics claimed about 30% of their total clothings.

The study further disclosed that, barring the poorest sections, the rural consumers also used rayon fabrics, and were found to have a reserved pair for special occasions like festivals and marriages. These fabrics attracted even the consumers belonging to the lower income groups. It is true that they cannot afford to have such costly cloth needing heavy capital investment initially, but a few of them reported that they had procured second-hand ready made coats, pants and bushshirts, generally from cities. Surely, the percentage of such consumption is very low, but it does provide evidence that people of all strata in Gujarat love these fabrics.

The Report of the study rightly mentioned that "...had it not been for supply constraints and the very high unit value of these varieties as a result of incredibly high excise levies, the shift away from cotton would have been even more marked. The urban bias for non-cottons and synthetics is very apparent, the percentage of total household
expenditure on textiles spent thereon being 42% as against 19% in rural areas."

Besides functional utility, a large number of cloth consumers are now-a-days looking for aesthetic appeal, easy care properties such as non-ironing, easy wash, quick-drying, possibility of wearing several times without washing or ironing, less cleaning expenses, more comfort and leisure. Most of the white collar employees and other urban buyers covered by the study considered these ones as the guiding factors for their choice.

A few households in the cities had informed that there was a dearth of reliable household servants or they were expensive, and that they preferred man-made fibres cloth to natural cloth as the former required less washing effort and time.

(ii) Finer Varieties

There have also been commendable research and development in the field of cotton textiles in recent years. Necessity has sharpened man's power of invention. The mill enterprises in Gujarat have maintained their supremacy in the manufacture of distinguished fabrics. They are known not only for their share in the total volume of production and trade but also for the countless varieties of their

* Ibid.
products. The mill executives of the well-equipped units usually favour the manufacture of variety-articles. In the words of a senior executive, Shri B.V. Bhatt, it is Gujarat in general and Ahmedabad in particular which is normally taking a lead in regard to the production of more sophisticated cotton textiles, and that we look for more designed goods both in woven and in prints. We also think in terms of offering different types of chemical finishes. It can be said, on examination of the product lines of the leading groups—Sarabhai's, Mafatlal's, Lalbhai's, etc.—that the off-loom variety of cotton textiles/fabrics is multiplying geometrically by the bleaching, printing and other finishing processes of fabrics manufacturing. This has resulted, as analysed later, in a growing variety of finished fabrics to cater to the changing demand of the consuming public. During my visits to the Ahmedabad Textile Industries Research Association, I could observe from close quarters the amount of research they are making in this field. The sustained effort on the part of these well-wishers of the industry would definitely add further impetus to the manufacture of limitless varieties, which can be tailored to meet almost any requirement of a consumer from any market segment.

The technological developments have resulted in tilting

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the demand for cotton textile fabrics of medium, fine, finer, better finished and sophisticated varieties. In Gujarat, there are number of 'bolti' (vocal) mills which are conscious of this trend and which act as leaders forcing the other units to follow suit.

(iii) Ready-made garments

Of late, there has been a growing realisation among the leading textiles groups of the country that it is worth their while to tap the vast market potential both at home and abroad, for ready-made garments. In India, Bombay Dyeing and Binny were among the first to enter this field. Now DCM, Hafatlals, Calico, Tata, Shri Ram and others have also made their entry in the field.

Till recently, the ready-made garments plants were decidedly export oriented, because an average Indian did not have the wherewithal to go in for his daily wears, and the purchase of a ready-made dress, slacks, a shirt, etc. was considered to be a luxury. Tradition and custom, too, had their own inhibitive influence. Again, the main wears like dhoties and sarees used by the masses call for no tailoring; they are the 'ready-mades' produced by the mill industry for long!

In recent years, however, the increasing interest of

some big textiles groups in Gujarat, such as Mafatlals and Sarabhai's, with the best technical workmanship and up-to-date fashions orientation, has attracted the urban and more sophisticated segments of the total textiles market to the ready-made stitched items. One of the reasons compelling them to enter the field was the realization that urban buyers, especially the youngsters and the white collared employees, constitute important market segments, always ready to welcome innovation in designs, colours, strips, styles and fittings. For instance, there are proud whispers and statements among the college-going girls: "Oh! I am a shirt-pant girl, not a saree-choli woman!" And, the adolescents and the young boys above that age are seen competing among themselves to be 'girlish' and 'manly' at the same time! Again, the fact that a large majority of the families avoid going to the tailors to get the clothes of their children stitched to order is indicative of the success achieved by the garment plants, though late starters.

The garments plants of the mills enjoy some additional benefits in relation to the independent garment units because of the former's reputation in the field of fabrics production. The mills can offer competitive prices because, unlike the independent garment plants, they are their own suppliers of the main raw material, the cloth. Sustained efforts on their part are bound to bring the adults, the middle and the lower
income groups and the rural folks increasingly in their fold.

(B): The industrial user market: Demand determinants

Co-existing with the ultimate consumer market for cotton textiles, there is another (a big, rich and widely diversified) market comprising of industrial enterprises, which make use of cotton fabrics for furthering the production of goods/services destined either for the ultimate consumer market or for other types of the industrial market. This means that the demand for cotton textiles also emanates from the industrial users.

The industrial demand is distinctive in certain respects. It depends upon the behaviour of the ultimate consumers of the end products in whose manufacture the cotton fabrics are used as raw materials or component parts. It is, thus, a derived from the demand. The other significant features of the industrial market are inelastic demand, and widely fluctuating and knowledgeable market.

The industrial market is the aggregate of all demands from the concerned business units who buy the textile mills products, the industrial and commercial uses of which fall into three broad divisions:

(i) Yarn usage: Besides being a raw material for the weaving and the knitting trades, yarn goes directly into the manufacture of Ropes, Cordage, String, Gloves, Nets, Hosiery, Lace, etc.
(ii) Mechanical cloths usage:

- Mines (including coal)
  - Conveyor belting
- Aircraft & Motor Industries
  - Tyres & Coverings
- Boot & Shoe Trades
  - Canvas
- Electrical Industry
  - Insulations
- Book Trade
  - Binding
- Oil, Flour, Sugar refining
  - Filters
- Aluminium, Zinc & Pottery making
  - Filters
- Printing
  - Backcloths
- Food Industry
  - Wrappings
- Laundries
  - Laundry Cloths
- Plastic & other Laminates
  - Press cloths
- Rubber Industry
  - Backing and Basic Cloths
- Paper & Board making
  - Dryer Felts and Filters

(iii) Commercial cloth and end products:

- Beltings, Typewriter Ribbons, Tracing cloths,
- Protective Clothing, Surgical Dressing and Bandages,
- Tarpaulins, Tents, Sails, Amnings, Targets, Umbrellas,
- Bunting, etc.

The list given above will help knowing and realizing the share of cotton fabrics in the industrial market. As

discussed earlier, recently the garment manufacturing units—
either managerially integrated, mills' own, or independent
ones, owned by outsiders—have also come up as major buyers
of the cotton textiles.

The basis on which the consumer market for fabrics has
been analysed can also be used for analysing the industrial
market. But, in general, the numerical strength and the
types of the industrial users, their size, geographical
distribution/location, their purchasing power, buying motives
and buying habits/patterns are the most significant factors
that influence the demand structure for industrial fabrics.

**Number and types of industrial users**

An analysis of the industrial market for cotton textiles
shows that it contains relatively limited number of buying
units whom the mill managements have to reach. Though actual
data concerning the sales volume and the number of buying
units are neither available nor compilable, the range of the
major types of the industrial buyers does enable us to have
a feel of their incidence. These are: manufacturing
industries, mines and quarries, agriculture, public
utilities, construction industries, transportation industries,
service industries, institutions—public or private, etc..

The rapid industrialisation will increase the numerical
strength of the cotton fabrics users. Expansion in Govern-
ment Departments will also increase their intake of the
materials.

Size of the users

The limited number of units making industrial purchases have larger buying power. Its concentration has an impact—both positive and negative—on various aspects of the marketing efforts. For example, their fewer numbers and larger orders make it possible to deal with them directly, which influences the total channel strategy. It also makes possible the production of fabrics as per their specifications. But, the industrial buyers have expert and competent buying executives who have up-to-date market information and bargaining strength because of the very sizes of the orders and units. Negotiating long-term contracts with them or securing their bulk orders may be very testing for the marketing executives of the mills.

Regional distribution of users

An important feature of the industrial market, though broad in scope, is its geographical concentration. The tendency to develop industries under 'one roof' of industrial estates and industrial areas is becoming marked. In Gujarat there were, in 1972, 73 estates and 22 areas in the state, out of which 22 estates and an equal number of areas were established and developed at various places.

Many more have come up since then. While all the units in these estates are not the users of fabrics, the aggregate demand for textiles would certainly have a positive impact of such pockets depending upon their achievements. Again, the Government and semi-government departments and institutions like the Police Department, S.R.P., Homeguards, Jails, State Transport, Military and Ashramshalas have their centralised buying patterns created concentrations in demand.

The buying patterns of these industrial users differ in great degree from those of the ultimate consumers. The persons who make the purchases also influence the demand. The frequency of purchases, the quantities ordered out, the attitude towards building up inventories, the negotiations between the parties, the types of supplies and the specifications regarding the quality of the products—all are chief determinants of demand; they are, in turn, influenced by the demand for mill-made fabrics. So also, the scientific and technological developments which generate substitutes for cotton fabrics used as the components or material by these industrial users have their restraining or adverse impact. Thus, for example, the birth of rayon disturbed the cotton mill industry, because it entered the tirecord market as a stronger competitor with its durability, jerks-resisting capacity and competitive price.

The industrial buyers seek benefits and not satisfaction.
They compute their benefits on cost-volume-profit or service relationships, and the marketing personnel of the mill enterprises have to keep this always in mind.

Meeting the changes in demand

All these factors that are volatile generate ever-changing waves influencing the demand structure of cloth. They render the marketing task of mill managements and the distributive personnel of cotton textile fabrics difficult and risky; more so in the case of the mills operating indigenously with relatively ill-equipped physical manufacturing facilities. The task of measuring the incidence of the different factors on demand—both quantitative and qualitative—and on the effectiveness of the product and the channel strategies has become more complex and tedious than ever before. The marketers cannot be content with a static or passive look at the developments. They have to be fully and intimately aware of the rapid changes that are taking place in both the segments of the market, viz., the consuming public and the industrial buyers they serve.

In short, the knowledge of the structure of demand, its components and its variables are of vital significance in designing the overall marketing strategies including the most important ones, viz., the product and the distribution channel strategies; for, a change in the demand for textiles
directly influences the marketing strategies and is, in turn, influenced by the marketing mix. The projection of the demand for fabrics is of help not only for an integrated planning of the mill's varied manufacturing but also for the making of necessary changes in their intra- and extra-company distributive machinery in advance.