IMPROVEMENT OF COCOON AND SILK MARKETING IN PAKISTAN

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I. Introduction

1. Background of the paper

Pakistan has a long tradition in sericultural practices. Since 1947, the industry has been somewhat expanded with increasing number of rearing farmers specially in Punjab Province in which the large scale mulberry plantations had been available from the colonial period. However, this industry has not reached the world standard level of production and processing, in spite of the endeavor that Pakistan governments both at Federal and Provincial levels have been trying to break-through draw backs of the industry over the last four decades. In order to improve the situation, it was necessary to create an effective organization staffed by properly educated and trained persons and guided by internally conducted research works. Realising the importance of this problem a five year project for the development of the industry was launched in July, 1984 at the Pakistan Forest Institute (PFI), Peshwar with a total cost of about 18 million (US & 1.125 million) rupees with the financial assistance from FAO/UNDP.

Pakistan government and FAO considered that it is the time to review the achievements of the ongoing project (PAK/UNDP/83/017), “Development of Sericulture in Pakistan” and to seek out further improvement of production and marketing activities realted to sericulture enterprise.

2. Purpose of the study of the marketing mission

The specific objectives of the study were as follows:

a) To investigate and assess the cocoon and silk marketing system in terms of purchasing process and quality-price setting;

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b) To analyze the present and future domestic demand for fresh cocoon, raw silk, silk yarn and silk fabrics including silk-allied produces;

c) To investigate the potential foreign demand for silk fabrics and allied products already produced in Pakistan, for products which have slightly different characteristics to appeal to the foreign market;

d) To recommend the government on the improvements of the marketing system for sericulture development, and

e) To formulate short, medium and long term marketing strategies for the major products(mainly silkworm seeds, cocoons, silk yarns).

II. Review of the Current Cocoon and Silk Marketing System and Practices

1. An overview of Supply and Demand Situation

Sericulture has been practised by the rural people of Pakistan for a very long time, but it still remains the status of a minor cottage industry. The industry has not progressed well during the past four decades mainly for lack of government patronage in the beginning and later due to absence of training and research facilities so essential to provide technical manpower and know-how for running the industry on scientific bases. Sericulture in Pakistan is being practised in all the four provinces under the administrative control of Provincial Forest and Wildlife Departments. In addition, this is looked after by the Department of Industries in Azad Kashmir. Punjab was the first province to start sericulture, immediately after the independence in 1947. Azad Kashmir followed in 1951, NWFP in 1952, Baluchistan in 1959 and Sind in 1976.

At present, 30,000 to 40,000 boxes of silk worm seed imported from Korea, Japan, Brazil and China and also 5,000 to 10,000 boxes of seed locally produced are reared every year mostly in spring to produce about 525 metric tons of dry cocoons and about 147 tons of 4044 single ply raw silk which are mainly used a weft in silk cloth weaving. In addition to this, about 580 tons of raw silk are imported from China, which can be used as a warp part of cloth. Silk weaving activity is done by about 5,500 hand looms mostly located in Karachi, Multan, Khairpur, Lahore and Sialkot, and so on.

The total demand for silk yarns and flesh cocoons appeared to be approximately 728 metric tonnes and 7,428 metric tonnes, respectively, which is reaching about 567 million Rupees (US 35.4 million dollars) of