

EXPLORING PROBLEMS OF MARKETING IN WOOLEN COTTAGE INDUSTRY IN CHITRAL

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Abstract. *This study focuses on the issues associated with the marketing of a local product in order to develop a strategic awareness of the obstacles and opportunities. The problem is assessed using sequential mix methodologies, which include quantitative research followed by a qualitative investigation. Primary data were obtained using questionnaires and semi-structured interview schedules from 220 and 40 workers, respectively, out of a total population of 3000 operating in the Garum Chashma Valley's woolen cottage industries. Because the study area is dispersed and mountainous, convenience sampling was adopted. The study reveals the issues that local artists confront, such as a paucity of Kari wool, a lack of marketing tactics, powerful middlemen, insufficient skills, and fierce competition. The study describes the challenges faced by household woolen industries in Garum Chashma, aiming to raise awareness among diverse stakeholders regarding the issues and potential opportunities within this crucial sector of the local economy. The goal is to stimulate the recovery and revitalization of the industry.*

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1. Introduction

Cottage industries refer to small, often informally structured home-based businesses, typically operated by family members on either a full-time or part-time basis (Fening, 2015). In Pakistan, cottage industries, such as pottery-making, embroidery, and woolen and cotton businesses, are predominantly family-owned enterprises. These businesses typically utilize locally accessible resources, including raw materials, technology, tools, and skilled artisans, in the creation of their respective products. These industries need low initial investment and employ simple equipment. In comparison to major firms, the level of investment in household industries is often determined by the initial capital required and the labor size employed (Fazal et al., 2021). The producers mostly sell these traditional

at the village's local market, which is then marketed by middlemen in the larger cities (Roomi & Hussain, 1998).

Cottage industries are an important element in the progressive evolution of businesses, enabling a smooth transition from agriculture to other economic areas. By acting as a catalyst for production to change from a small to a larger scale, these industries offer a strategic advantage to corporations in developing countries. Their links to other sectors, especially agriculture, make them a valued asset for businesses seeking to expand their operations (Jesmin, 2009).

Nearly every country around the globe, regardless of its development status, grapples with significant economic challenges like unemployment, poverty, and budget deficits. Nevertheless, the extent of these economic hurdles varies from one nation to another. In the midst of these challenges, cottage industries play crucial roles by effectively utilizing substantial human resources, thereby mitigating unemployment and enhancing the income of the workforce (Tarmidi, 2005; Brata & Ali, 2007).

A developing country like Pakistan might benefit economically from the cottage industry as well. Pakistan's economy is largely centred on agriculture, covering farming, livestock, and agro-based industries (Nasir & Hyder, 2006). Many of the nation's ancient trades, abilities, and crafts have vanished, while others are on the verge of extinction for various reasons. One of Pakistan's sickest cottage industries is the wool industry. Pakistan's wool production is still in its infancy (Mustafa, Iqbal & Farrukh, 2005).

As per the Agha Khan Rural Support Program (1996), rural communities primarily derive their income from agriculture. Many families engage in cultivating small plots of land for the production of crops and animal fodder. Alongside other occupations, a substantial portion of the population relies on livestock, particularly sheep and goats, for their livelihoods. According to Mian (1986), the Kari sheep holds a crucial role in the production of Patti (woolen cloth) in the Garum Chashma Valley of Tehsil Lotkoh Chitral. The handicraft industry in Chitral significantly contributes to both increasing income and improving the quality of life for local artisans, as highlighted in a 2020 study by Uddin, Tariq, and Orakzai. Patti-making stands out as a key economic activity in the region. This handcrafted woolen cloth measures 30-35 cm in width and 18 m in length, created from wool available in three natural colors: white, black, and brown. To achieve the red color, walnut husk is used to dye the white wool. The primary products crafted from Patti include caps, gowns, coats, and waistcoats.

2. Literature Review

The craftsman typically operates his cottage business out of his house, with family members helping him out. Part-time or full-time employment are both possible (Mmadabuchi, 2021). The tools employed in cottage enterprises are simple.

Known cottage industries include the production of toys, woodworking, hand-knotted carpets, and woolen goods. A small-scale business typically employs 10 to 50 people for hired labor (Nasir, 2012). The majority of cottage enterprises rely heavily on labor and has minimal use of technology in their operations (Hyder, 2006). These industries exhibit openness and flexibility in adapting to necessary changes in product lines or inputs at a relatively low cost, even under unconventional circumstances. Cottage and small-scale industries are recognized as the starting point and fundamental building blocks for the establishment of heavy and large-scale industries in a country (Steel, 1977).

Jain (2005) believes that rural cottage industries can be a source of part-time work for agricultural labourers. However, Aryeetey (1993) highlights that limited availability of finance is a serious hurdle to their growth. Mmadabuchi (2021) suggests that cottage industries can benefit from modern technologies to produce goods faster, which is not a concern for larger-scale industries that have better access to credit. Due to their rural location, unstable income, and low literacy rates, cottage industries are hesitant to borrow from commercial banks and instead depend on informal sources such as cooperative societies and personal connections. Several economic factors such as employment, GDP, exports, per capita income, and entrepreneurship are influenced by cottage industries (Tolentino, 1996; Oboh, 2004; Odeh, 2005). Paul (2019) highlights some significant issues with cottage enterprises, including inadequate compensation, reduced interest, and insufficient supplies of raw materials.

According to Ravindra and Shivakanth (2010), the most difficult task for Small and Medium Enterprises (SMEs) is not only survival but also sustainable growth. In this age of global competitiveness, this is only achievable through the use of technology, innovation, and the formation of inter-firm alliances. SMEs must be competitive or they will be forced out of the market, resulting in resource waste, unemployment, and sluggish industrialization. Sharmin and Hossain (2020) identified many loopholes such as lack of preservation and marketing skills, lack of craftsmen, proper space are some of the reasons of disappearance of cottage business. Tasnim and Biswas (2014) address the current state of cottage industries in Bangladesh, emphasizing the urgent need for technological modernization. Despite their significant role in generating employment and fostering economic development in the country, there has been a lack of tangible efforts in this direction by the government. Presently, obstacles such as intense competition from larger industries and a dearth of credit facilities are hindering the growth of cottage industries. Analyzing the significance of small-scale industries, Karthihaselvi, Neelamegam, and Megesan (2010) highlight that these enterprises are labor-intensive, relying on skills and efforts. Essentially, these businesses are well-suited for entrepreneurs from the middle class.

Wool production in China encounters various challenges, including diseases, the encroachment on grazing lands, and floods. Particularly in the pastoral regions of mainland China, the wool marketing and production systems are not sufficiently modernized. Despite these challenges, wool continues to be cultivated and consumed in the markets, as noted by Longworth and Williamson (1993) and Longworth and Brown (1995). Furthermore, Longworth, Brown, and Waldron (2005) report that wool production has gained momentum compared to nearly a decade ago. Marketers are actively informing wool growers and producers about current market demands.

The cottage industry in Pakistan has faced a critical situation over the past decade, with key areas such as Sialkot, Gujrat, Lawrencepur, and Faisalabad being significantly impacted. Its contribution to the economy has declined for various reasons compared to the 1980s, and its actual potential for fostering the country's growth and progress remains largely untapped. The lack of support from capital markets has been a major hurdle for this industry, with a World Bank report (2013) indicating a capital shortage of approximately 90 percent. Despite a significant need for small loans among the people of Pakistan, only 7% of the population has access to this credit capacity (Aslam, 2013). Furthermore, even though Pakistan has abundant pastures and grazing lands for raising sheep, wool production has not been prioritized, as highlighted in the GOP report of 2007.

In the province of Khyber Pakhtunkhwa, shepherds are typically either nomadic individuals or small landowners who rear their flocks of sheep in communal grazing lands, pastures, along roads, and in long, narrow grazing areas beside canals. They adhere to either seasonal migration or a settled pastoral grazing system. As one travels from the hot and flat southern regions to the cold, mountainous areas in the north of Pakistan, variations in sheep breeds and characteristics may be observed (Ahmad, Khan, & Rahim, 2004).

In Khyber Pakhtunkhwa province, the shepherds are either nomads or small landowners and raise their flocks (sheep) on communal grazing lands, pastures, roads, and on canals sides' long and narrow grazing areas. They follow either seasonal migration or sedentary pastoral grazing systems. Differences and variations may occur in the sheep breed and features while going from hot and plain southern regions to the mountainous cold region of north Pakistan (Ahmad, Khan, & Rahim, 2004).

This study focuses on evaluating the challenges surrounding the commercialization of the woolen cottage industry in District Chitral. With Woolen Patti as the sole industrial base, the people of Chitral, particularly those in remote areas, have relied on woolen product production, trade, and marketing as a source of income. However, the household cottage industry is currently facing significant challenges that jeopardize employment and income opportunities for local residents. Despite Chitral's reputation for producing high-quality Kari Sheep woolen cloth under the

"Moghakan" Brand, the wool business faces stiff competition and a declining market. This situation may be attributed to outdated processing methods, a lack of government support, and issues related to product quality and promotional strategies. The study's objective is to comprehend the marketing dynamics of the woolen industry and propose strategies for its revival and promotion.

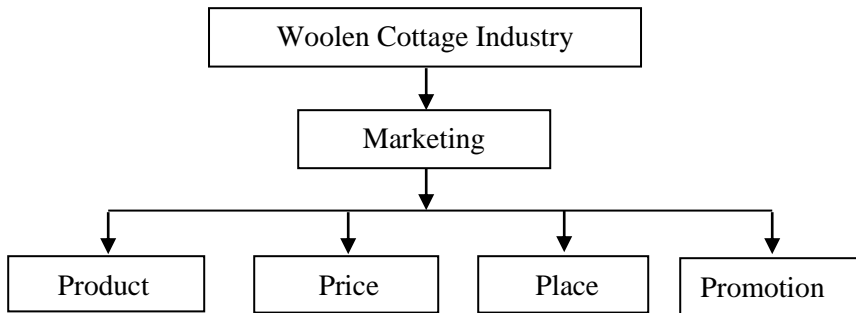


Figure 1: Study's Model

3. Research Methodology

The marketing of household woolen enterprises in Chitral's Garum Chashma Valley has been the primary emphasis of this article. Due to limitations in both time and resources, the researcher has restricted their attention to the marketing aspect of the shu sector.

The study relies primarily on first-hand information, supplemented by secondary data obtained from various published sources. A pilot study was conducted by the researcher before the main research commenced, and based on the insights gained from the pilot study, the research questionnaire was formulated. The primary data were collected through a combination of a questionnaire and a semi-structured interview schedule, implemented in two stages. The first stage involved predefined questions, while the second stage employed a semi-structured interview schedule. Interviews were conducted in a natural setting to facilitate personal observation. Additionally, the researcher closely observed respondents' behaviors, their work environments, and the wool processing activities.

Convenience sampling was employed in this study due to the dispersed and mountainous nature of the area, making it challenging and time-consuming to reach every location. The study is divided into two stages:

- i. During the initial phase of the study, the data from closed-ended questions were organized and analyzed using the Statistical Package for the Social Sciences (SPSS) tool.
- ii. In the second phase of the research, the data were analyzed utilizing the framework analysis proposed by Miles and Huberman (1994). This method

was chosen by the researcher for its perceived comprehensiveness and simplicity in qualitative data analysis.

The semi-structured interview segment includes eleven questions designed to complement the closed-ended questions and retrieve any potentially overlooked information within the scope of the overall purpose and objectives of the thesis.

The study population comprises local entrepreneurs and skilled workers, including women spinners, men weavers, and dealers from the Garum Chashma Valley in Chitral, engaged in the production of Woolen Patti using indigenous techniques within their homes. According to Krejcie and Morgan's (1970) method, a sample of 341 is required from the total population of 3000. Of the 341 questionnaires distributed, 228 were returned, resulting in a 66% response rate. Eight questionnaires were left blank, leaving 220 questionnaires for further analysis. To validate the data, the researcher conducted semi-structured interviews with 40 individuals, including adult males and females, aiming to enhance understanding and cover all aspects of the phenomena comprehensively.

4. Data Analysis

The researcher has carried out the analysis section in two stages. The stage 1 is analytical framework phase 1 while the next is analytical stage 2 in order to smoothly grasp the depths of the study.

4.1 Analytical framework phase I

The data from closed-ended questions has been processed and analysed at this stage of the study using the statistical package for social sciences (SPSS) Tool. The following lines provide responses to the four Ps of marketing.

4.1.1 Product issues

The product related questions' responses of majority respondents have been given here;

The majority of respondents stated that woolen fabric is the primary product when asked Question 1 about the main products made from wool. Retailers and whole vendors in the district Chitral and Peshawar main markets provide additional value. The results of Question 2 indicate that most respondents think there are no strategies for product design and development. Nothing has been done by the government to advance technical education in that field. The artists continue to work with antiquated patterns. In response to Question 3, the majority of respondents said that the costs of synthetic and blended wool items are rather inexpensive. These kinds of items were created by artists using readily accessible readymade warp and weft from the market.

In Question 4, a significant number of participants express the view that the decline in the supply of raw wool is attributed to the scarcity of professional herders. Furthermore, they elaborate on the primary reasons, including:

- i. Reduction in the sheep population.
- ii. Insufficiency of grazing lands.
- iii. Shortage of feed.
- iv. Incidence of sheep diseases and predators.

As per the consensus of most respondents in Question 5, the predominant color in demand for sheep is white, with black being identified as the most scarce yet highly sought-after color. Other colors mentioned include camel, grey, red, and half-white. The utilization of walnut husks is noted for dyeing purposes, particularly to achieve the color red. Question 6 reveals that the majority of respondents consider woolen products as emblematic of Chitrali culture. These products evoke a sense of pride among the people, who are unwilling to relinquish their cultural heritage.

Woolen cloth, known as Patti, constitutes the primary product in the study area. Additional value is infused into it to create items such as coats, gowns, caps, etc. The Moghakan Brand has gained considerable fame due to its quality, although there has been a recent decline in its standards for various reasons. A prevailing perception of low quality among the locals is linked to the use of synthetic wool or yarn. Based on the researcher's observations, there is a shortage of local wool, leading some artisans to resort to imported wool, often of inferior quality.

4.1.2 Price

In Question 1, where the fixation of show prices was discussed, the majority of respondents indicated that local retailers determine the prices of Shu. They exploit producers and artisans to maximize their profits, recognizing the limited access producers have to the main markets in the province. Regarding Question 2, a majority of respondents expressed the opinion that the prices of blended yarn and wool have increased, consequently leading to higher prices for woolen fabrics. In another question, a majority of respondents observed that the prices of pure locally made products are notably high, indicating a high demand but limited supply. Additionally, some retailers engage in the sale of synthetic woolen fabrics using local brand names, contributing to black marketing practices that adversely impact the reputation of a local brand known as "Moghakan."

The pricing of Moghakan Patti remains elevated due to its superior quality. However, the decline in its reputation can be attributed to certain retailers or producers who sell synthetic Patti using the Moghakan brand name. Presently, consumers exert significant influence, possessing more alternatives than before.

Machine-made products, with their lower costs and refined finish, have largely dominated the market.

4.1.3 Placement

The placement or distribution related questions' responses have been given in the following lines for further understanding of the situation. In response to Question 1, which inquired about the middlemen's share in the business, the majority of respondents noted that retailers and wholesalers are in a more favorable financial position compared to local producers. Primary artisans focus solely on crafting woolen fabrics, while secondary artisans, such as retailers, add further value by creating items like caps and gowns. Historically, both skills were often performed by primary artisans. In regard to Question 2, concerning raw wool producers, the majority of respondents indicated that local raw wool producers do not receive a suitable return, primarily due to middlemen who claim the appropriate returns. Additionally, artisans with high-quality products face challenges in accessing main markets, leading to exploitation by local retailers or agents.

According to the findings from Question 3, the majority of respondents express the view that local producers of woolen fabrics lack direct access to the primary markets in District Chitral and Qissa Khawani Peshawar. The direct distribution channel proves to be costly for some producers, prompting most of them to opt for an indirect channel. As indicated by Question 4, the majority of respondents expressed the opinion that handloom producers lack a market development strategy. The absence of individual unions or associations for woolen producers hinders their ability to explore new markets. Although woolen caps, coats, waistcoats, and gowns are well-received across the country, the critical missing element is the exploration of innovative strategies.

In response to Question 5, the majority of respondents noted that the supply of pure local wool is extremely limited. This scarcity can be attributed to various factors such as a shortage of grazing lands, the absence of professional herders (gujors), challenges in sheep keeping, sheep diseases, and the presence of predators. Question 6 reveals that the majority of respondents assert that profitability is achievable when both artisans and sheep are available at home. Such a scenario yields a qualitative product due to the personal dedication of the artisans and the use of pure local wool. Consequently, woolen fabrics created under these conditions have a high demand in the market.

In response to Question 7, the majority of respondents state that certain local artisans prefer engaging in commodity-to-commodity transactions to avoid credit dealings. This preference arises from the limited scope of cash transactions in this type of business, as it involves a luxury item rather than a necessity. Question 8 indicates that the majority of respondents believe that middlemen purchase both good and bad quality Shu at the same rate. Some local retailers adopt this approach, while retailers in larger markets refrain from such practices altogether.

As per the explanations provided by the respondents, retailers and wholesalers hold a dominant position in the woolen business. The primary advantages of this industry do not trickle down to the grassroots level, leading to a decline in the activities of herders or local wool suppliers. Unfortunately, these individuals lack support from any quarter and face challenges such as limited access to prominent markets and a lack of information.

4.1.4 Promotion

In response to Question 1, which focused on exhibitions for woolen products, the majority of respondents expressed the view that there are no local trade fairs or exhibitions. Consequently, this absence adversely impacts the sales of goods, highlighting a shortcoming among handloom artisans who may not give sufficient importance to marketing strategies. According to Question 2, the majority of respondents believe that the optimal utilization of promotional activities could significantly enhance the woolen business. In an era marked by intense competition, organizations must proactively address challenges. Respondents note that a lack of marketing activities stands out as one of the prominent issues facing the woolen cottage industry.

Based on the researcher's observation, marketing serves as a crucial bridge between sellers and consumers. In an age characterized by intense competition, the absence of marketing techniques makes it exceedingly challenging to facilitate the sale of goods. However, in the realm of woolen products, marketing activities are nearly non-existent, and promotional efforts are scarcely employed. This can be attributed to the following factors:

- i. Insufficient infrastructure facilities.
- ii. Limited access to primary markets.
- iii. Elevated transportation costs
- iv. Lack of information and awareness.
- v. Unavailability of an all-weather route.

4.2 Analytical Framework Phase II

During this stage of data analysis, the data from semi-structured interviews were examined utilizing the framework analysis of qualitative data proposed by Miles and Huberman (1994).

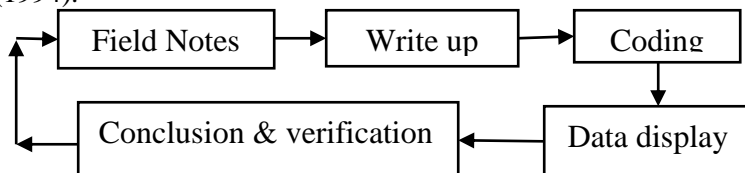


Figure 2: Miles and Huberman model of data analysis

The data generated by the Semi-structured interviews have been further processed as depicted below.

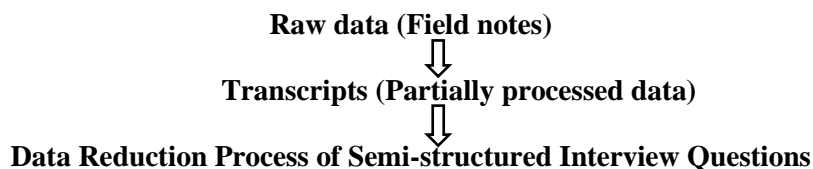


Table 6: *Coding of Data*

Main Modes	Related Questions
Training Centre for Skill Development Government Assistance Marketing Development Infrastructure Improvement	Q 1
Clipping Scouring Teasing Carding Spinning Weaving	Q 2
Absence of Planning and Management Inadequate Government Support Financial Challenges Transitional Phase	Q 3
Hand-operated method Machine-driven processes	Q 4
Obsolete techniques State-of-the-art machinery Skill development Necessity for promotion Synthetic fiber	Q 5
Positive with Government Negative if it persists It will not cease	Q 6

4.2.1 Conclusion Stage of Qualitative Data for Phase II

The two analytical stages revealed that the woolen cottage sector is experiencing issues that require corrective action; else, this handloom industry would become extinct. Garum Chashma Valley's woolen cottage business is unusual in that its Patti is manufactured from Kari Sheep wool, which is regarded as one of the best wools in Pakistan. Another reason is that its Moghakan Brand of Patti has gained popularity not only within but also beyond the country because to its stability and

durability. However, it has been losing quality and competitiveness with each passing day. The majority of respondents stated that the following factors are to blame for this state of affairs:

- i. The woolen industry encounters significant competition from emerging substitute products, leading to heightened bargaining power for both consumers and suppliers. The marketing and management strategies employed by woolen cottage industries are deemed insufficient to confront these challenges. To address these issues, government assistance in skill enhancement, marketing, and infrastructure development could mitigate the weaknesses faced by these handloom woolen industries.
- ii. The tools used in value chain processes are antiquated. The incorporation of new technology will not only enhance production but also inspire artisans and business producers.
- iii. The younger generations prefer modernized tools, asserting that the manual process of woolen work is time-consuming and cumbersome. The implementation of new and upgraded tools will enhance both production efficiency and the final finishing of the product.
- iv. The distribution of woolen Patti lacks a direct channel. Most producers do not have a direct avenue to reach district and provincial markets. Financially, retailers and wholesalers are in a relatively better position compared to producers of woolen fabrics.

5. Discussion and Recommendation

The growth and development of the wool industry face a significant hurdle in the form of inadequate marketing. The analyses of both Phase 1 and Phase 2 results indicate a scarcity of promotional activities such as advertising, publicity, and online marketing. Exhibitions or trade fairs showcasing woolen products at the tehsil and district levels are rare. The absence of marketing skills and promotional efforts contributes to a low profit margin for woolen products. Moreover, there is a lack of new and appealing product designs for consumers, as the secondary artisans in woolen product manufacturing adhere to traditional designs for shu products. As per Khanka (1994), marketing serves as the bridge connecting producers to end-users. Goods and services lack value for their producers until they are successfully sold in the market. Additionally, marketing is the art of identifying the needs and wants of consumers, creating a product or service to meet those needs and wants, and determining the optimal methods for pricing, promoting, and distributing goods and services to the ultimate consumers (Sekar et al., 2014).

The findings of this study align with those of Fening (2015), indicating that producers in cottage industries encounter numerous challenges in marketing their products. This is primarily attributed to intense competition from both domestic and international goods, a consequence of globalization and a free-trade economy. Artisans and producers of woolen fabrics have constrained resources, making it difficult for them to undertake extensive publicity, advertising, and other promotional activities.

5. Conclusion

The persistence of woolen work in this remote, mountainous, and cold area is attributed to its status as a hereditary occupation, a socio-cultural necessity, and the demand for warm clothing. Despite the economic challenges faced by the local population, their hardworking and committed nature contributes to the continuity of this business. Government promotion of this industry would be advantageous, given the existing basic infrastructure at a lower level. The newer generations show a preference for updated tools in the processing. The researcher's observation and the respondents' explanations highlight that the manual process of woolen work is time-consuming and laborious. The introduction of new instruments is expected to enhance both production and the final finishing of the product. The outcomes and discoveries of this study indicate that the handloom industry confronts numerous significant challenges, including a scarcity of Kari sheep wool, insufficient marketing techniques, a lack of adequate skills, intense competition with synthetic and woolen products, a shortage of advanced instruments, and insufficient government support. Effectively addressing these issues would significantly improve the status of household enterprises, ultimately contributing to the revitalization and sustainability of this crucial economic activity, vital for the survival of the impoverished residents in the study area.

6. Recommendations

1. The current shearing system should undergo enhancement with a more modernized approach, as the existing shearing instrument involves locally available scissors that are ineffective in achieving uniform cuts on the sheep fleece.
2. In order to remove grease and other dust particles from wool, the government or non-governmental organizations should work with the local artisan community to establish a common shearing center in at least every village. There, wool fleece should be cleaned, dried, and washed both before and after shearing using efficient washing materials and techniques.
3. Wool spinning, which is usually done by female artisans, should be enhanced because the heavy and slow wool spinning wheel causes waist and arm problems, which are more common in those genders.

4. To expedite the procedure, the weaving machine that is readily available locally also needs to be improved. Male craftspeople do the majority of the weaving. The resources of fewer artisans and producers would be greatly enhanced by the creation of common spinning and weaving hubs in the region.
5. In order to promote and sell their products efficiently and without the need for middlemen, wool growers and fabric manufacturers should set up their wool enterprises as cooperative societies at the district, provincial, and federal levels. For the purpose of increasing woollen fabric sales, producers had to concentrate not only on promotion but also on product design.
6. The absence of any garment-making artisan in the area suggests ample opportunities for adding more value at the local level. If artisans were equipped with the skills pertinent to this activity, local producers could achieve a higher profit margin on their products. In this context, the skill development center in Chitral holds the potential to play a significant role.
7. Preserving, promoting, and innovating arts, crafts, and culture are crucial not only for cultural preservation but also from a tourism perspective. These unique arts and crafts can serve as distinctive souvenirs for tourists, generating income for the local community.

5.3 Policy Implications of the Research

The findings of this study give a clear message to all stakeholders to be fair and supportive, especially with female artisans regarding training opportunities, working conditions, dignity, respect, and voice in the decision-making process. Being at a high altitude, there is ample availability of water due to glaciers. The public and private partnership may work together for electricity generation for the local woollen community. This study has explored that lack of electricity and cold weather are two main problems among others. The all-time and free availability of electricity to woollen artisans may solve some of the problems to a great extent.

5.4 Limitations of the Study

In the present study, certain limitations and weaknesses need to be discussed and which will be helpful in the future study. These limitations have been discoursed in these lines: First, the current study conclusion was drawn based on a sample size of 260 respondents in Garum Chashma valley of Chitral. Therefore, the findings of this study are needed to be restricted to the present study and can hardly be generalized to other sectors. The second limitation of the study is that the women's contribution to shu making process has not been fully explored because of cultural constraints like the veil system of women in the community to avoid interaction with non-relatives males. Third, the close-ended questionnaire has only two options that are 'Yes' and 'No' which is also one of the limitations of this study.

Fourthly, owing to limitations in time and financial resources, the researcher has solely examined the marketing aspect of the woolen handloom industry. Future researchers may delve into other aspects in greater detail.

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