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RESEARCH ARTICLE

EVALUATING THE ECONOMIC PERFORMANCE AND CHALLENGES OF JAMMU AND KASHMIR'S HANDICRAFT SECTOR: AN OVERVIEW OF POST-2020 HANDICRAFT SECTOR DYNAMICS

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Abstract

The handicraft sector in Jammu and Kashmir holds a significant position in regional economy. It is labour intensive industry and creates significant employment. This study analyses the sector's economic performance, sectoral composition, and modernization initiatives during the post-pandemic period (2020–2025). Data depicted that the industry currently employs 4.22 lakh artisans, ranking as the second-largest employer after agriculture. Export trends reveal high volatility but overall resilience; following a pandemic-induced downfalls, export value peaked at ₹1,162.29 crore in 2023–24. Although global geopolitical instability caused a contraction in 2024–25, early fiscal data for 2025–26 demonstrates a robust 243% year-on-year recovery. Sectoral analysis highlights a structural shift in output, with Woolen Shawls (41.06%) and carpets (27.30%) now dominating export shares. Furthermore, the study shows recent policy interventions, specifically the Geographical Indication (GI) certification of 17 indigenous products and the implementation of QR code-based traceability systems. These measures are identified as vital mechanisms for validating authenticity, combating counterfeiting, and enhancing global market reachability and competitiveness. The findings highlight the sector's economic viability and the efficacy of technological integration in sustaining traditional livelihoods and providing employment.

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Introduction:-

Handicraft products are objects produced with handcrafted tools, showcasing the artisans' talents and inherent creativity. The materials used in the handicraft sector are found locally, and the products are created without the aid of contemporary equipment. Handicrafts were established in Kashmir during the reign of Sultan Zain-UL-Abideen, often known as Budshah, the wonderful king, who ruled the Kashmir from 1420 to 1470 AD. King Zain-ul-Abidin engaged skilled craftsmen from Central Asia to educate local inhabitants in many handicrafts that were previously unknown to the state's citizens (Yasmin & Bhat, 2013). During Shah Hamadan's expedition to Kashmir, unemployment reached its zenith, and the population endured significant adversity. Concurrently, Shah Hamadan

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brought seven hundred skilled craftsmen to Kashmir, proficient in various crafts, who shared their knowledge with the local community, thereby facilitating the ongoing development of the handicraft industry, which achieved global recognition (Naseem-ul-Gani, n.d.). In 1972-73, they established a comprehensive handicraft division to promote crafts on a broader scale. Prior to its establishment, the department was formerly part of the Directorate of Industries and Commerce (Amin Bhatt, n.d.). The handicraft industry of Jammu and Kashmir plays a crucial role in the region's overall development and its related sectors by providing revenue and employment; hence, it occupies a prominent place in the economy of Jammu and Kashmir. It is essentially a cottage industry that provides direct and profitable employment to over 300,000 persons and has the potential to improve the quality of life for citizens both inside and beyond the state's boundaries. The handicraft sector is the second largest employer, behind agriculture, offering millions of jobs (Manzoor, 1991). Jammu & Kashmir has a competitive advantage in the manufacture of premium, internationally acclaimed textiles.

International acclaim for these products stems from their unique craftsmanship (Yasmin & Bhat, 2013). The primary crafts of Kashmir's handicraft industry include embroidered shawls, crewels, namda, chain stitch, papier-mâché, costumes, jewelry, kanishwals, and carpets, which represent a significant fraction of the state's overall export. (Govt. of J&K, handicrafts' dept.). Handicrafts thus hold an important position in the economic structure of Jammu and Kashmir. Handicraft activities are especially suitable for the union territory of Jammu and Kashmir because they are more labor-intensive and less capital-intensive, thus offering tremendous job opportunities on a large scale (Shah, 2016). The handicrafts' industry is one of the most important for Jammu & Kashmir because it generates revenue for other industries as well as offering employment opportunities. The handicrafts industry in Jammu & Kashmir has the potential to bring about an enhancement in the living standards of its people both within and outside the state borders (Qayoom et al., n.d.)

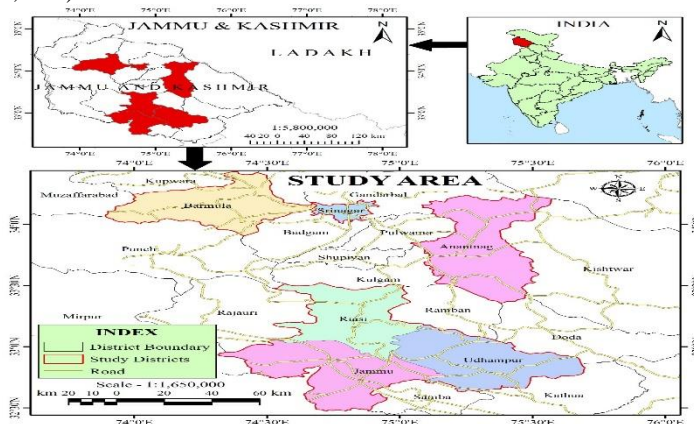


Figure1. Study area

Objectives of the Study:-

The main objectives of the study are:

- To analyse the craft-wise export and employment generation of the handicrafts sector of J&K during 2020-2025.
- To examine the relationship between export and employment generation by the handicrafts sector of J&K.

Methodology and Source of Data:-

The present study aims at studying the export and employment generation by the handicraft sector in Jammu and Kashmir. The present research work is both descriptive and analytical in nature. The present study is based on secondary data. The secondary data have been collected from various official sources like the Directorate of Handicrafts (Jammu/Kashmir) and the Directorate of Economics and Statistics. Moreover, books, journals, newspapers, and other online sources were also analysed to obtain desired data. Various statistical tools and techniques like average, growth rate, standard deviation (S.D), coefficient of Variation (C.V.), and correlation analysis have been used to analyse and interpret the data. Collected information was additionally evaluated with the assistance of different sorts of pie outlines.

$$M = \frac{1}{n} \times \sum_{i=0}^n X_i$$

Where M = mean and n = the number of terms.

X_i = value of each individual item in the list of numbers being averaged

$$G. R = \frac{Y_t - Y_{t-1}}{Y_{t-1}} \times 100$$

G. R = growth rate

Where Y_t = Value of current year

Y_{t-1} = Value of base year

Standard Deviation:-

Standard deviation is calculated by applying the following method.

$$\sigma = \sqrt{\frac{\sum X^2}{N}}$$

Where σ = Standard Deviation $x^2 = (x - \bar{X})$ N=Number of observations

Coefficient of Variation :-

It is expressed in the following form:

$$CV = \frac{\text{standard deviation}}{\text{mean}} \times 100$$

Compound Annual Growth Rate (CAGR):-

In order to study the year-wise growth in the variables, the compound annual growth rate has been calculated.

$$CAGR = \left(\frac{Y_t}{Y_{t-1}} \right)^{\frac{1}{N}} - 1 \times 100$$

Where Y_t = Value of Current Year

Y_{t-1} = Value of base year

N = Number of Years

Correlation:-

Karl Pearson's coefficient of correlation method has been used:

$$r = \frac{\sum dxdy}{\sqrt{\sum dx^2 \sum dy^2}}$$

Where r = Karl Pearson's coefficient of correlation.

$\sum dxdy$ = Total of the products of the deviations of values from their respective arithmetic means in both series.

$\sum dx^2$ and $\sum dy^2$ = The deviations of dx and dy are squared up, and their totals, $\sum dx^2$ and $\sum dy^2$, are obtained.

Table 1:- Year-Wise Craft-Wise Export (export in ₹ crores) of Handicraft Industry of J&K

Year	Carpets	Woolen shawls	Papier-mâché	Other items	Total values	% change (total)
2020-21	299.56	172.53	13.27	150.16	635.52	(Covid Base)
2021-22	251.05	165.98	13.25	132.85	563.13	-11.39%
2022-23	357.21	424.2	8.51	326.45	1,116.37	+98.24%
2023-24	317.33	477.24	38.44	329.28	1,162.29	+4.11%
2024-25	260	306	27.61	139.98	733.59	-36.88%
Average	297.03	309.19	20.22	215.74	842.18	+13.52
S.D.	43.37	142.01	12.46	102.54	278.4	
CV	14.6	45.93	61.61	47.53	33.06	
CAGR	-3.48	15.4	20.1	-1.74	3.65	

Source: Directorate of Handicrafts, Jammu and Kashmir

The table presents the craft-wise export performance of the handicraft industry in Jammu and Kashmir during the post-2020 period. The overall export value of the sector initially declined from ₹635.52 crores in 2020–21 to ₹563.13 crores in 2021–22, after which it showed a sharp increase, reaching ₹1,162.29 crores in 2023–24 before falling to ₹733.59 crores in 2024–25 due to instability in the global market. During the period, the industry recorded an average export value of ₹842.18 crores with a compound annual growth rate (CAGR) of 3.65 percent. Craft-wise analysis shows that carpet exports declined from ₹299.56 crores in 2020–21 to ₹260.00 crores in 2024–25, recording an average of ₹297.03 crores and a negative CAGR of –3.48 percent. However, carpets registered the lowest coefficient of variation (14.60 percent), indicating relatively stable export performance and consistent demand despite the decline in value. In contrast, woollen shawls exhibited significant growth, increasing from ₹172.53 crores in 2020–21 to ₹306.00 crores in 2024–25, with a peak of ₹477.24 crores in 2023–24. The sector recorded an average export value of ₹309.19 crores and a strong CAGR of 15.40 percent, although its coefficient of variation (45.93 percent) is higher than that of the total industry (33.06 percent), suggesting greater fluctuations in export performance. Similarly, the export value of papier-mâché increased from ₹13.27 crores in 2020–21 to ₹27.61 crores in 2024–25, with an average of ₹20.22 crores and the highest CAGR of 20.10 percent among the crafts. However, it also recorded the highest coefficient of variation (61.61 percent), indicating the greatest volatility and year-to-year fluctuations in export figures. Overall, while papier-mâché and woollen shawls recorded the highest growth rates, carpets remained the most stable sector, and the handicraft industry as a whole showed moderate positive growth driven mainly by the expansion of shawl exports despite the recent decline in 2024–25.

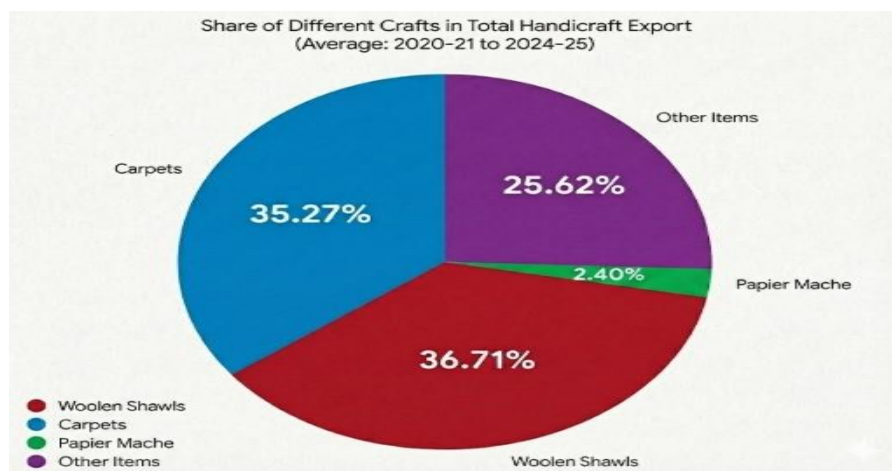


Figure 2. Craft-Wise Percentage to Total Export of Handicraft Industry

The category-wise analysis of handicraft exports from Jammu and Kashmir shows varied trends across major crafts. Woolen and Pashmina shawls experienced significant post-pandemic growth and overtook carpets as the leading export item in 2022–23, reaching a peak of ₹477.24 crores in 2023–24 due to strong demand in luxury markets and the support of GI tagging. However, exports declined sharply by nearly 36 percent in 2024–25, indicating volatility in the sector. In contrast, carpets, though showing a gradual decline from their 2022–23 peak, remain a stable core of the handicraft industry. The introduction of QR code-based GI tags has helped maintain value per piece even as total exports fell to ₹260 crores in 2024–25. Papier-mâché, traditionally a niche segment, recorded remarkable growth with a 351 percent increase in 2023–24 (from ₹8.5 crores to ₹38.4 crores) before moderating in the following fiscal year. The overall 37 percent decline in total exports in 2024–25 has been attributed to global instability, particularly the Red Sea crisis and the Russia–Ukraine war, which disrupted logistics and reduced luxury spending in major markets such as Europe and the United States. Despite this setback, the outlook for 2025–26 appears positive, as early data for Q1 shows exports rising by 243 percent compared to the previous year’s low base, indicating a potential recovery toward the ₹1,000 crore level. (DIRECTORATE OF HANDICRAFT, J&k, n.d.)

Table 2. Year Wise Employment in Handicraft sector of Jammu and Kashmir

Financial Year	Estimated	Registered Artisans*	% Change (Total Employment)	Key Driver of Change
	Total Employment (Artisans)			
2020-21	3,40,000	~2,50,000	-(Base Year)	COVID-19 Impact; low export.
2021-22	3,55,000	2,74,000	+4.41%	Launch of Karkhandar] Scheme & Credit Card push.
2022-23	3,81,500	3,12,000	+7.46%	Surge in Export (GI Tagging) increased work demand.
2023-24	4,22,000	3,81,505	+10.61%	Peak Growth. High export demand for Shawls/Carpets.
2024-25	4,30,000	3,90,000+	+1.90%	Stabilization; focus on skill upgrade over new entry.

Source: Directorate of handicrafts (Jammu and Kashmir)

The employment trends in the Jammu and Kashmir handicraft sector after 2020 indicate a process of formalization rather than mere expansion in raw job creation. Government initiatives encouraging artisans to register for benefits such as the Artisan Credit Card have significantly increased recorded employment in the sector, rising from an estimated 3.40 lakh workers in 2020–21 to 4.22 lakh in 2023–24. Craft-wise employment distribution for 2023–24, based on data from the J&K Industries and Commerce Department, shows that employment is largely concentrated in three core sectors. Among these, the Sozni (embroidery) sector has emerged as a major employer, closely rivalling the traditionally dominant carpet industry (DIRECTORATE OF HANDICRAFT, J&k, n.d.).

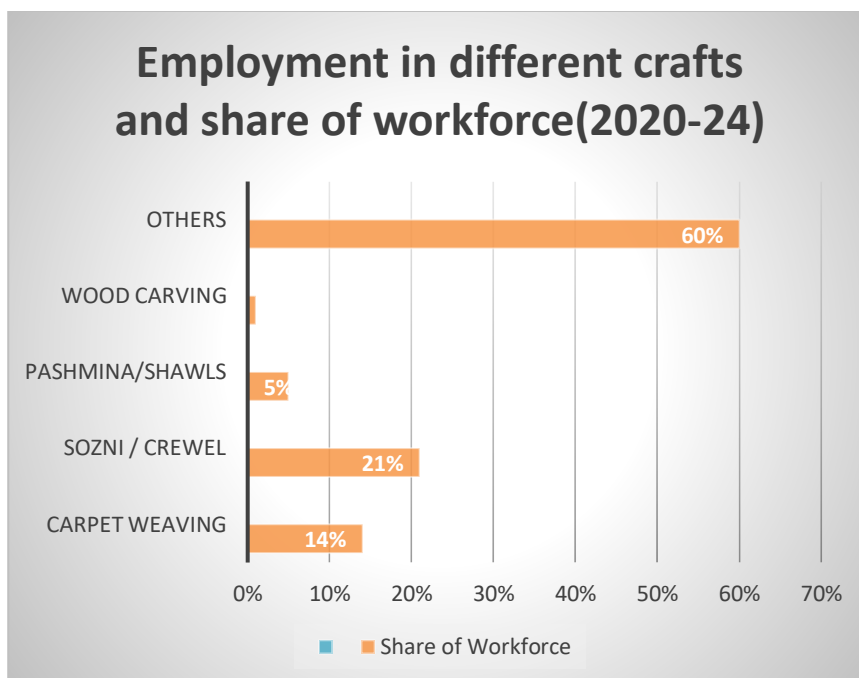


Figure 3. Employment distribution in J&K handicraft sector 2020-2024

Table 4 Employment in different crafts and share of workforce from 2020-24

Craft	Approx. Employment	Share of Workforce	Status post-2020
Carpet Weaving	~57,410	14%	Stable. Shift towards high-value silk carpets.
Sozni / Crewel	~86,950	21%	Growing. High demand for Pashmina embroidery.
Pashmina/Shawls	~21,400	5%	High Value. Lower volume but highest per-capita income.
Wood Carving	~1,120	<1%	Declining. Struggling with raw material shortages.
Others	~2,55,120	60%	Includes unorganized allied workers (spinners, dyers).

Source: Directorate of handicrafts (Jammu and Kashmir)

The growth of employment in the Jammu and Kashmir handicraft sector after 2020 has been influenced by several key policy and market drivers. One major factor is the Karkhandar Scheme launched in 2021, which provided a stipend of ₹2,000 per month to trainees and ₹25,000 per batch to master craftsmen (Karkhandars). This initiative helped revive declining crafts such as glazed pottery and silverware, bringing over 5,000 new young artisans into the sector who might otherwise have left the trade. Another important driver has been the strict implementation of Geographical Indication (GI) tags for carpets and Pashmina, which restricted machine-made imitations from being marketed as Kashmiri products. As a result, demand for authentic certified products increased in markets such as Europe and the Gulf, leading to a 20–30 percent rise in artisans' daily wages, from around ₹350 to ₹500–600. Additionally, the Artisan Credit Card scheme improved financial inclusion by offering loans up to ₹2 lakh with a 7 percent interest subsidy, encouraging many previously unregistered artisans to formally register. This explains the sharp rise in recorded artisans from 3.4 lakh to 4.22 lakh. Overall, although employment growth appears significant at about 24 percent between 2020 and 2024, a substantial part of this increase reflects the formalization of

previously unregistered workers, alongside genuine job creation driven by the export boom during 2022–23.(DIRECTORATE OF HANDICRAFT, J&k, n.d.)

Correlation Table: Export vs. Employment:-

The following table summarizes the relationship between the financial performance of the sector and the size of its workforce.

Table 5 Correlation Analysis

Variable1	Variable 2	Correlation Coefficient (r)	Relationship Strength
Total Export (Export)	Employment (Artisans)	0.53	Moderate Positive

Table 6 Data Points Used for Calculation

Year	Total Export (₹ Crore)	Employment (Lakh Artisans)
2020-21	635.52	3.4
2021-22	563.13	3.55
2022-23	1,116.37	3.82
2023-24	1,162.29	4.22
2024-25	733.59	4.3

Source: Directorate of handicrafts (Jammu and Kashmir)

The calculated correlation coefficient of 0.53 between export performance and employment in the Jammu and Kashmir handicraft sector indicates only a moderate positive relationship, which is relatively lower than expected in a labour-intensive industry. One major reason is the lag effect in employment. While exports have fluctuated significantly—declining in 2021–22, surging in 2023, and falling again in 2024–25—employment has shown a steady upward trend. This occurs because employment in the handicraft sector is relatively sticky; artisans do not immediately exit the workforce during export declines, and during export booms it takes time to train and integrate new workers. Moreover, the formalization drive to register previously unregistered artisans continued even during periods of export slowdown, which partly decoupled employment growth from export performance. Another factor is the distortion caused by formalization, as a considerable share of the rise in employment after 2020 reflects the administrative registration of existing but previously unrecorded artisans, mainly to provide benefits such as the Artisan Credit Card, rather than purely new job creation. Consequently, employment figures increased in 2021–22 and 2024–25 even when export performance was weak or stagnant, weakening the statistical correlation. Additionally, the data suggests a shift toward higher productivity rather than proportional workforce expansion. For instance, the sharp 98 percent increase in exports in 2022–23 corresponded with only about a 7.5 percent increase in employment, indicating that the existing workforce absorbed the surge mainly through increased productivity and working hours rather than large-scale new hiring. Overall, while higher exports generally encourage greater employment, the post-2020 trends show that government policies—particularly artisan registration drives—have been a stronger driver of recorded employment growth than fluctuations in market demand, resulting in a steadily rising workforce alongside volatile export performance.

Karl Pearson Correlation Matrix (Employment vs. Export):-

This table shows how strongly the employment numbers correlate with the export performance of each specific craft.

Table 7 Sector-Wise Correlation Coefficient of Different Crafts with Employment

Craft Category	Correlation Coefficient (r) with Employment	Relationship Strength	Interpretation
Papier Mache	0.79	Strong Positive	High correlation suggests that employment growth is most closely tracking the recent surge in this niche sector.
Woolen Shawls	0.71	Strong Positive	As the largest employer and highest value export recently, its growth aligns well with the rising artisan count.
Total Export	0.53	Moderate Positive	Overall export drives employment, but government registration drives have kept employment rising even when total export dipped.
Other Items	0.36	Weak Positive	Employment in wood carving/crewel is less sensitive to year-on-year export fluctuations.
Carpets	0.02	No Correlation	Surprising Result. Employment has continued to rise (due to registration) even while carpet export has remained flat or

			declined, disconnecting the two trends statistically.
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Source: Directorate of handicrafts (Jammu and Kashmir)

Analysis of the Results:-

The correlation analysis reveals varying relationships between export performance and employment across different handicraft sectors in Jammu and Kashmir. The carpet sector shows an extremely low correlation coefficient of 0.02, indicating almost no statistical relationship between export fluctuations and employment growth. While carpet exports have been volatile over the years, the number of registered artisans has increased steadily from 3.4 lakh to 4.3 lakh, suggesting that the rise in recorded carpet weavers is largely due to the formalization of existing workers through government initiatives such as the Artisan Credit Card, rather than employment expansion driven by export demand. In contrast, the papier-mâché sector demonstrates a strong positive correlation of 0.79, as the sharp rise in exports from ₹13 crores to ₹38 crores coincided with the peak period of artisan registration in 2023–24. This indicates a closer link between market demand and workforce expansion in this craft, possibly reflecting genuine capacity growth or the impact of targeted schemes such as the Karkhandarprogramme. At the aggregate level, the overall correlation coefficient of 0.53 indicates a moderate positive relationship between exports and employment, implying that although export growth influences employment trends, government policies promoting financial inclusion and artisan registration also play a significant role in increasing employment figures independent of immediate market demand.

Conclusion:-

The post-2020 trajectory of the Jammu and Kashmir handicraft industry reflects a period of structural transition, resilience, and administrative formalization. After the pandemic-induced slowdown, the sector recovered strongly and reached a historic export peak in 2023–24, though it remains sensitive to global geopolitical and economic instability. A clear structural shift in the export composition is evident, with woolen and Pashmina shawls emerging as the primary growth engine, recording a CAGR of 15.40 percent, while the carpet sector experienced a negative growth rate of –3.48 percent during the same period. Despite this decline, carpets remain the most stable segment, reflected in the lowest coefficient of variation (14.60 percent). The growth momentum of the industry is currently driven mainly by the shawl and papier-mâché sectors, with papier-mâché showing strong potential despite considerable volatility. Another key finding is the moderate correlation ($r = 0.53$) between export value and employment, indicating that employment growth is not solely market-driven. The particularly low correlation in the carpet sector ($r = 0.02$) suggests that the steady rise in employment is largely a result of state-led formalization policies, including initiatives such as the Artisan Credit Card and Karkhandar schemes, which encouraged the registration of previously unrecorded artisans.

As a result, employment growth has become relatively “sticky,” continuing to rise even during export downturns, such as the decline observed in 2024–25. Policy measures like Geographical Indication (GI) tagging and QR-code digitalization have also strengthened buyer confidence in premium crafts and helped maintain higher value per unit. However, the 36 percent fall in export value in 2024–25 highlights the sector’s vulnerability to external shocks, including disruptions such as the Red Sea crisis and economic slowdowns in Western markets. Overall, the post-2020 phase of the Kashmir handicraft industry reflects a “quality over quantity” approach, where higher value per unit and a broader formal artisan base provide a stronger foundation for growth. Future policy efforts should therefore focus not only on artisan registration but also on capacity building, productivity enhancement, and market diversification to reduce dependence on traditional Western markets and ensure long-term stability.

Strategic Policy Recommendations:-

Need for Strategic Policy Shift:-

The widening disconnects between rising artisan registration and fluctuating export volumes, along with the high volatility in certain sectors such as papier-mâché ($CV = 61.61\%$), indicates that the Jammu and Kashmir handicraft industry must move from a model of protective preservation to aggressive commercial adaptation. While government initiatives have successfully expanded the formal artisan base, export performance remains unstable, highlighting the need for policies that strengthen market integration, productivity, and global competitiveness.

Market Diversification to Reduce Geopolitical Risk:-

One major priority is diversifying export markets to reduce dependence on traditional Western economies. The sharp 36 percent decline in exports during 2024–25 was largely linked to recessionary trends and geopolitical disruptions affecting Europe and the United States, which remain the primary markets for Kashmiri handicrafts. To mitigate such risks, the government should adopt a “Look East and Middle East” strategy, targeting emerging high-value markets such as the UAE, Saudi Arabia, and Southeast Asia. In addition, the domestic Indian luxury market, estimated at approximately \$6 billion, remains relatively underutilized and can serve as a stable buffer against global market volatility.

Revitalizing the Carpet Sector through Design Innovation:-

The carpet sector, despite being historically central to Kashmir’s handicraft economy, has recorded a negative CAGR of –3.48 percent and an extremely low employment correlation ($r = 0.02$), indicating stagnation despite stable demand. To address this challenge, the Directorate of Handicrafts should establish a design studio under the Indian Institute of Carpet Technology (IICT) that integrates traditional weaving techniques with contemporary color palettes and design styles suited for modern global interiors.

Bridging the Employment–Productivity Gap:-

The weak correlation between export growth and employment suggests that a significant portion of newly registered artisans may be underemployed or engaged in part-time production. Consequently, policy must shift from simply increasing artisan registration to enhancing productivity and utilization. This could include conducting performance audits of schemes such as the Karkhandarprogramme to ensure that training stipends translate into sustained export production.

Strengthening the Papier-Mâché Sector:-

The papier-mâché sector, which recorded the highest growth potential (CAGR of 20.10 percent), remains highly volatile due to product fragility and logistical challenges during export. To stabilize this sector, targeted investments in research and development for improved packaging and stronger material composition are essential.

Digital Authentication and Product Provenance:-

Although Geographical Indication (GI) tagging and QR-code digitalization have improved product authenticity, counterfeit products continue to affect market credibility. Therefore, the handicraft sector should move toward blockchain-based digital provenance systems for high-value crafts such as Pashmina shawls and silk carpets.

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