The results of an evaluation of the individual investment incentives are shown in Table 45.

4.6 Recommendations for Improvement

1) Basic Perspective

(1) Relative Superiority of Investment Environment

Sri Lanka is blessed with a location along the trade routes of the Indian Ocean and further is proceeding with economic deregulation so offers incentives as good as those of other countries. Among the factors of production, its labour force is relatively inexpensive and abundant and further is high in quality, which would give relative superiority to a labour intensive goods export industry. The country does not enjoy large reserves of natural resources, but has mineral resources such as gems and ceramic materials and further is suited for the cultivation of rubber, coconuts, and tea. It might not be said, however, that investment climate of Sri Lanka is best in Asia, because there are many countries with good investment climate in Southeast Asia.

(2) Current State of Investment Environment

On the other hand, competition is intensifying with other countries seeking foreign investment. Sri Lanka has not yet established a good image for itself as an investment site. Its image as an investment site is, undeniably, poor due to the political and social instability caused by the civil conflicts, the former economic policies limiting free activities of private companies, etc. Further, as touched on earlier, problems remain such as the need for construction of infrastructure and for improvements in the implementation of investment incentives. Also, at least among Japanese investors, the Sri Lankan investment environment is still not well known.

(3) Importance of Foreign Investment

Sri Lanka's strategy of industrialisation, in particular the creation of export-oriented industries, which is based on private business activities, forms the basis for the country's programme of economic development. Foreign investment plays a large role in this. The growing export-oriented industries have helped lead the economy to recovery since 1989. Private investment, including foreign investment, was mainly responsible for this. The effects of Sri Lanka's strategy of creating export industries are starting to appear.

To maintain and strengthen this development, it is necessary to continue to encourage investment. With this in mind, the issues involved in promoting investment are summarised below and programmes for improvement based on these are recommended.

2) Issues

(1) Improvement of Investment Incentives and Policies

The system of incentives, promotional measures, etc. can be considered just as good as those of other countries. For example, the maximum 15 year tax holiday offered in Sri Lanka is a most advantageous incentive in many Asian countries and is attractive to foreign investors. The "one-stop service", employment and similar services of the BOI are also considered very useful by many investors.

There are, however, strong demands for improvements in how these incentives and services are provided. Typical examples of these are as follows. Some effort at improvement is sought.

[1] Indication and usage of simple, transparent, and automatic criteria for approval of investments and provision of incentives

[2] Streamlining and acceleration of procedures, including customs clearance

[3] Rationalisation and modernisation of related laws and regulations

Promotion of well-balanced labour legislation by amendment of old Termination of Workers Employment Act, for example.

[4] Strengthening of Support Services

Strengthening of public support services for business, such as means of commutation of workers and worker education and training. For example, the general principle now is for companies to provide means of commutation on their own, even companies residing in export processing zones, but this hampers improvement in productivity through a transition to a double shift. Some improvement is required here.

[5] Maintenance of Current Incentives and Policies

The tax system is in the process of being reformed as part of the programme of structural adjustment of the economy. It is hoped, however, that the current investment incentives and investment promotion measures will be maintained. If and when these are reevaluated in the future, rational thought should be given so as not to damage the interests of investors.

(2) Establishment of Investment Environment

Private business is the main force behind foreign investment. Unlike with simple export arrangements, foreign investment involves a transfer of comprehensive management resources. For this reason alone, the benefits to the recipient country are huge. On the other hand, the risks to the company are high. Therefore, investors choose investment environments where the risks are low and reliability is high.

In view of this and of the current world situation where so many countries are eagerly soliciting foreign investment, Sri Lanka should improve its investment environment further in the following respects: [1] and [2] are preconditions to foreign investment in other countries as well. [3] is also seen in many countries, but will be a particular important issue in Sri Lanka in the future judging from the current situation.

[1] Maintenance of Political and Social Stability

Sri Lanka has restored political and social stability in all but a few areas. It is hoped that stability will be maintained in the medium and long term.

[2] Maintenance of Open Economic System and Policies

The current open market economic system, which guarantees free activities of private companies, and the market oriented economic policy behind it should be maintained.

[3] Establishment of Infrastructure and Support System

The infrastructure, in particular the stable supply of power, transportation (roads, shipping, and air freight) and telecommunications (telephones and telexes) should be improved. This must go beyond construction of physical facilities and include improvement of the reliability of services as well. Building up the infrastructure will take a long time and massive funds, so in the short term it would be effective to develop industrial estates provided with the basic infrastructure.

In addition to establishment of the infrastructure, a public support system assisting business activities should be strengthened, for example, to train engineers and international traders and establish standards.

(3) Strengthening of Foreign Investment Promotion Activities

Sri Lanka has established investment incentives and policies and has expanded the organisation and authority of the BOI which implements them. Despite these superior systems and policies having been prepared, the objective of promoting investment cannot be achieved if they are not known to foreign investors and do not lead to foreign investment.

As mentioned earlier, a survey of investment demand in Japan showed there is little interest among most Japanese companies in investing in Sri Lanka. The reason is that compared with Southeast Asia, it is far in distance and there is relatively little knowledge of it gained through trade. In addition, there is insufficient information on the investment environment in Sri Lanka. As a result, companies, in particular small businesses, are unfamiliar with Sri Lanka and lack suitable awareness of it.

There are currently a large number of investment promotion organisations and similar organisations from the West and Southeast Asia in Japan. As many as 130 exist there, as shown in the table 33 (not including embassies) and these compete in trying to entice investment from Japanese companies. And while they do not have offices there, even socialist countries like Vietnam and Democratic People's Republic of Korea are aggressively promoting investment from Japanese businesses.

In view of this situation, it is believed that the following types of promotional activities are necessary to attract investment to Sri Lanka:

[1] Improvement of media for supply of information and provision of information through them

[2] Strengthening of PR and publicity activities using mass media, etc.

[3] Access to potential investors

[4] Promotional activities in targeted countries on commercial basis by professional consultants

The above-mentioned [1] and [2] are desirable to start by explaining the situation in Sri Lanka so as to stir up interest in that country and then explain in a concise, easily understandable format the investment environment there. This two-part approach would be effective. Further, in addition to English, use should desirably be made of Japanese and other languages of the target countries. For [3], it is recommended that Sri Lanka not only approach the head offices, but also promote reinvestment from affiliates in Southeast Asia.

3) Programmes for Improvement

The following programmes will be implemented to deal with the above:

(1) Short Term Programmes

[1] Improvement of Investment Incentives and Policies

Under the initiative of the BOI and the Industrialisation Commission, the current systems and policies should be maintained and improvements made in how investments are approved and incentives are extended (simple, transparent, and automatic implementation etc.), customs clearance and other procedures streamlined and speeded up, and labour regulations rationalised and modernised.

[2] Strengthening of Foreign Investment Promotion Activities of BOI

The BOI is requested to strengthen promotional activities overseas and work to publicise Sri Lanka and its investment environment in coordination with Sri Lankan embassies in other countries. At that time, use should be made of the mass media, missions dispatched and received, seminars held, and effective use made of assistance schemes of UNIDO and investment promotion organisations of other countries. Further, cooperation should be obtained from embassies overeas and the above investment promotion organisations to uncover potential investors and work on them directly and a matching service should be offered helping to arrange joint ventures and technical tieups between Sri Lankan and other companies.

[3] Invitation of Foreign Advisors on Investment Promotion

Advisors on promotion of investment will be engaged in the BOI from key countries targeted for securing investment and be charged with obtaining a grasp of problems through a dialogue with existing investing companies, recommending measures for improvement, engaging in promotional activities targeted at potential investors, and providing consultations on investment. It would be even more effective, if "country" desks (for example, a Japan desk) were established under these advisors. In the case of small and medium sized Japanese firms, it is important to communicate with them using the Japanese language.

[4] Improvement of Information Materials

The BOI should continue working to improve the pamphlets and investment guides used to attract foreign investment and widely distribute these. When the materials are for Japanese corporations, they should be prepared in Japanese.

The Japanese-language video already produced by the BOI has been highly rated by the Japanese who have seen it. It would be even more effective to offer a series of such videos, each providing detailed information on specific industrial parks, the Sri Lankan labor situation, the local infrastructure, and so on.

[5] Promotion of Dialogues with Foreign Companies in Sri Lanka

It is important for Sri Lanka to do the needful for assisting foreign companies who have already invested, in addition to inviting new investments from abroad. In ASEAN countries, most of investment promotion organisations are making efforts to solve problems raised by existing foreign companies through dialogues. BOI is requested, therefore, to keep in touch with existing foreign investors and try to solve or improve issues though regular dialogues.

(2) Medium and Long Term Programmes

[1] Improvement of Infrastructure

The government is requested to continue improving the infrastructure including a stable power supply, transportation (roads, shipping, and air freight), and telecommunications (telephones and telexes) based on the master plan. This has to be dealt with on a medium and long term basis, so for the short and medium term, industrial estates provided with the basic infrastructure will be developed. Also, in building the infrastructure, Sri Lanka will not only construct physical facilities, but also strive to improve the reliability of services.

[2] Expansion of BOI

The BOI should cover the entire territory of Sri Lanka in the future and provide the entire country with the required services. Further, it should engage in activities overseas to promote investment. Its present organisation, however, is not sufficient for this. In accordance with the change in name from the GCEC to the Board of Investment, consideration should be given to increasing the staff, funding, and domestic and foreign service networks.

[3] Study of the SAARC Trade, Investment and Tourism Promotion Centre Concept

The ASEAN Centre in Japan plays a major role in promoting investment from Japanese companies, increasing trade between Japan and ASEAN, and promoting tourism in the ASEAN countries. Sri Lanka has taken the initiative in the activities of the SAARC, the regional economic cooperation organisation of the countries of Southwest Asia, and come up with the concept of an SAARC Centre, which would function in a similar fashion as the ASEAN Centre. There are many problems to be resolved in realising this concept, such as the balancing of interests of the member countries, but the merits of such a centre would be tremendous, and a study should be made to realise this concept in the medium and long term.

[4] Enhancement of PR and Investment Promotion Activities in Key Target Countries

In general, public relations efforts and activities to attract foreign companies should be enhanced. In this regard, it would be effective to draw up a list of key target industries for investment attraction (e.g., the electronics and electrical equipment industries, which are viewed as having the greatest future potential, and light industrial sectors producing labor-intensive products for export) and focus activities on these industries. (Another possibility that will be taken into consideration is the selection of specific companies to be visited directly by BOI officials.)

In terms of promoting Sri Lanka in general, the invitation of journalists from big-circulation newspapers, financial journals, and trade journals from target countries would also be an effective measure.

If possible, the retaining of PR consultants would also be effective.

Action Programmes for Promotion of Investment (1/2)

Programme	Implementing organisation	Action/Activity: Follow-up	Action/Activity: Short-term (1 to 3 years)	Action/Activity: Medium and long-term (4 years or more)
I. Short-term programme				
1. Improvement of investment incentives and policies	BOI/MIST Industrialisation Commission	• Review of current incentives and policies and grasp of issues • Deliberations with related domestic and foreign organisations	• Maintenance of current systems and policies • Improvement of investment approval and incentives • Promotion of streamlining and acceleration of procedures (including customs clearance)	
2. Strengthening of foreign investment promotion activities of BOI	BOI Overseas Sri Lankan embassies UNIDO Investment promotion organisations of other countries	• Formulation of plans for activities for promotion of foreign investment and strengthening of promotional activities • Establishment of panel for promotion of dialogues with existing foreign companies	• Invitation of journalists • Dispatch and acceptance of missions • Hosting of seminars • Active use of schemes of UNIDO and related organisations of other countries • Uncovering of potential investors • Direct approaches • Matching service (introductions for joint ventures, technical tieups, etc.)	
3. Invitation of foreign advisors on investment promotion	BOI	• Formulation of plans for invitations • Establishment of panel for promotion of dialog with existing foreign companies	• Promotion of dialogues with existing foreign companies • Promotional activities aimed at potential investors • Investment consultations and response to inquiries	
4. Improvement of information materials • Strengthening of PR and publicity on Sri Lanka and its investment environment	BOI	• Strengthening of activities for promotion of foreign investment	• Improvement and distribution of pamphlets and investment guides for promoting foreign investment • Improvement and distribution of videos for promotion of investment	
5. Promotion of dialogues with foreign companiese in Sri Lanka	BOI Investment promotion advisors Key investing countries' related organisations	• Establishment of panel for promotion of dialogues with existing foreign companies	• Grasp of problems, requests for improvement, etc. • Formulation and implementation of feasible actions	
II. Medium- and long-term programme				
1. Improvement of infrastructure	BOI/MIST Industrialisation Commission Related organisations	• Formation of consensus in the Government through MIST initiative • Deliberations with related domestic and foreign organisations	• Construction of industrial estates • Formulation of plans for implementation through invitations of foreign experts	• Stable supply of electric power • Improvement of transportation (roads, shipping, and air freight) • Improvement of communications • Development of industrial estates

Action Programmes for Promotion of Investment (2/2)

Programme	Implementing Organisation	Action/Activity		
		Follow-up	Short-term (1 to 3 years)	Medium and long-term (4 years or more)
2. Expansion of BOI	BOI	• Formulation of plans for expansion of BOI	• Implementation of plans for expansion of BOI	• Strengthening of organisation of BOI
3. Study of SAARC Trade, Investment and Tourism Promotion Centre concept	BOI/MIST Ministry of Foreign Affairs	• Deliberations with related domestic and foreign organisations	• Deliberations with countries related to SAARC Centre	• Promotion of idea of establishment of SAARC Centre
4. Enhancement of PR and investment promotion activities in key target countries	BOI	• Enhancement and strengthening of activities for promotion of investment • Formulation of plans for selection of target companies	• Enhancement and strengthening of investment promotion activities • Advance surveys for selection of target companies	• Establishment of key industries for promotion of investment and running of PR and investment promotion campaigns for these key industries • Selection of target companies and company visits • Invitation of journalists (trips to cover articles)

5. RECOMMENDATIONS FOR MEDIUM AND LONG TERM PRIORITY PROGRAMMES

5.1 Basic Concept

In promoting export-oriented industries, first of all the short-term programmes mentioned in the sections on garments and apparel, gems and jewellery, and rubber-based products should be quickly implemented. These are comprised of measures which would quickly deal with the key issues facing these industries. In many cases, further, much could be done by making use of the efforts of business itself, the existing organisations and resources of the EDB, IDB, SLSI, etc., and the assistance schemes of international organisations and the overseas aid organisations of other countries.

The medium and long term programmes, however, require much input of resources and time for implementation. These deal with common issues in the promotion of industry and exports for all sectors, not only the three sectors covered in this survey. The effects of these programmes will be that much greater. Private companies would find it difficult to implement these programmes, so the government or some governmental organisations are required to take the initiative in them. In implementing these programmes, further, maximum use should be made of the existing resources of Sri Lanka and use should be made of the assistance schemes of international organisations and overseas economic aid institutions.

Based on this thinking, medium and long term priority programmes are recommended below. These are based on the medim and long term programmes for the three subsectors, give consideration to important issues common to all industries, and take into account the recommendations from the Sri Lankan side (see Fig. 10).

5.2 Medium and Long Term Priority Programmes

1) Development of Human Resources for Export Marketing

(1) Background and Objectives

Sri Lanka is stressing creation of export-oriented industries as the heart of its economic development policies and has named the 1990's the "Decade of Exports".

There is a shortage of the people for achieving this plan, however. It is becoming urgent to develop and train people knowledgeable in international trade in the government and industry. At the present time, there are substantially no organisations providing practical training in trade. The establishment of a Trade Training Centre (provisional name) or centre functions would be desirable in a medium to long term.

(2) Implementing Organisation

It appears to be appropriate that the centre will be set up under the EDB (Export Development Board) - the central organisation for export promotion, which covers a wide range of industries, including trade in services. Use should be made of idle government owned land in Colombo or its environs. If there are similar concepts in promotional organisations for individual industries, these should be controlled by this centre for their more efficient realisation.

(3) Details of Programme

[1] Coverage of Training

The training should be primarily given to people in the industrial world, but could also be given to staff of government organisations administering the export promotion programmes.

[2] Details of Training

Following is a list of possible areas for training:

i) Practical trade know-hows
ii) Export marketing
iii) Quality control, standardisation, and inspection
iv) Design and packaging
v) Area studies and foreign language training

Training in these areas will be used to provide practical expertise in the subjects listed below.

Basic marketing concepts
Main elements of the marketing mix

Export marketing strategy and formulation of export plans
Trade promotion strategy and measures
Institutional infrastructure for export promotion
Trade information and documentation
Export market selection and export market research
Distribution channels
Product development and adaptation
Standardisation and quality control
Costing and pricing for export
Export design and packaging development
Export financing
Export credit guarantee and insurance
Export procedures and documentation
Trade fairs and exhibitions
Publicity and advertising in foreign markets
Organisation of trade missions and market orientation tours to overseas countries
Selection of export agents
Physical distribution management
Shipping and freight services
Marine insurance
Air cargo freight services
Trade terms (for instance incoterms)
Settlement of trade disputes
Other legal aspects of foreign trade (for instance intellectual property rights)
Joint ventures
International tendering
Official commercial representation abroad
State trading
Trade policy matters
Preferential trading systems
Economic and technical cooperation in international trade
International monetary issues and environment

(4) Effects

Along with the growth of private businesses, it will become essential to train international traders knowledgeable in export marketing, etc. This public support service can be expected to train the people needed for promotion of exports in a wide range of industries.

(5) Action Plan

At present, it would be difficult to establish a Trade Training Centre due to budgetary constraints, etc. As a result, this project will be taken up in the medium to long term. For now, work should focus on the drawing up of a basic concept, the forming of a consensus within the government, and other follow-up activities. Further, EDB trade training facilities should be strengthened and expanded.

In addition to its trade training programme in Colombo, the EDB has begun a programme of export awareness in rural areas. These and similar programmes should be used to develop a large pool of personnel capable of taking responsibility for the nation's exports.

2) Promotion of Standardisation and Quality Control (Expansion of the SLSI)

(1) Background and Objectives

Sri Lanka's policies for creation of export-oriented industries call for government promotion of standardisation and quality control and the strengthening of testing, inspection, and metrology services by public bodies for private business. Compliance with ISO 9000 (inspection and certification) and assistance to private companies for TQM (Total Quality Management) activities are also needed. These important services should be implemented as one of the priority programmes.

(2) Implementing Organisation

National standards are administered by the MIST and are promoted by the Sri Lanka Standards Institution (SLSI), established in 1965. The latter organisation has 330 employees and has built a new central laboratory (2500 square meters) in Colombo. Further, it plans to build laboratories in the regional areas too. The latter labs will serve the growing needs of regional areas as they develop. One lab has been built in Kurunegala and other three are scheduled.

In addition to this expansion plan, the MIST and SLSI should take the initiative in complying with ISO 9000 and providing assistance to private companies for TQM activities.

(3) Details of Programme

<1> Augmentation of testing, inspection and measuring equipment at SLSI's central and regional laboratories

SLSI's central laboratory currently consists of laboratories/workshops for the following fields:

Food
Chemicals
Microbiology
Textiles
Materials
Metrology/calibration
Electrical/electronics

SLSI is especially interested in augmenting and expanding the equipment for testing, inspection and measurement in these laboratories/workshops. It also plans to provide testing and inspection services to private companies through its regional laboratories. This service will require the purchase of the equipment, valued at about Rs. 175 million, listed in Table 46. Of the three industry sectors covered by the present survey, textile testing and inspection functions will be enhanced for garments and apparel production, for which the plan to build 200 local factories is underway.

<2> Compliance with ISO 9000 and promotion of TQM

Most of Sri Lanka's export products are produced based on the standards in use in the importing country/region. Thus, SLSI has focused on compliance with international standards rather than the creation of Sri Lanka's own set of standards. Special priority has been given to compliance with ISO 9000, which is a set of international quality control standards, and the establishment of an inspection and certification system is an important issue for the medium to long term.

Concerning services for private business, the SLSI plans to develop a Total Quality Management (TQM) system taking into account current conditions in Sri Lanka, provide consulting services to private companies, and provide training for human resources, in addition to the enhancement of facilities at SLSI laboratories described above. In this respect, the organisation has expressed its interest in learning from the experiences of Japan and other countries which have been very successful in progressing from SQC to TQC to TQM.

<3> Invitation of foreign experts and overseas training for SLSI staff

Foreign experts will be invited to Sri Lanka as part of the activities described in <1> and <2> above. These experts will be asked to train SLSI staff in testing and inspection, to carry out surveys concerning compliance with ISO 9000 and the development of TQM systems, and to draw up action programme drafts.

Further, overseas training for SLSI staff will be expanded to improve their testing and inspection skills.

(4) Effects

Through the promotion of standardisation and quality assurances for export products, productivity will be improved in the industrial field and a contribution made to greater exports. Public services provided by the government to private business can play a large role in this.

(5) Action Plan

As for <1> of the programmes mentioned above, financial arrangement should be made for augmentation of equipment. Concerning <2>, and action programme should be formulated with advices of experts in TQM.

3) Prevention of Industrial Pollution and Promotion of Energy Conservation (Expansion of the CISIR)

(1) Background and Objectives

In the economic development policies of Sri Lanka, emphasis is placed on industrial development. There has been striking growth in the industrial sector in recent years as a result. However, while the need for monitoring and prevention of industrial pollution has been talked about, no specific measures have been devised to do this yet. The general level of awareness of this among businessmen is low, and there is a marked shortage of pollution prevention technicians. The need is therefore growing for quick measures to protect the environment, in particular to prevent industrial pollution, along with industrial development. At the same time, it is necessary to encourage energy conservation.

(2) Implementing Organisation

To coordinate with the Central Environmental Authority (CEA), which is in charge of environmental protection policies, and prevent industrial pollution, either an Industrial Pollution Prevention Technical Centre (provisional name) will be set up in the Ceylon Institute of Scientific and Industrial Research (CISIR) under the MIST, or the pollution prevention functions of CISIR should be strengthened. CISIR was established in 1955.

(3) Details of Programme

<1> Development and training of technicians for monitoring and prevention of industrial pollution

The CISIR currently has about 70 technicians, of which 50 are university graduates. However, only eight of these are engaged in pollution prevention activities. Their number is to be increased and their skills levels improved. These technicians are to take the initiative in monitoring industrial pollution at private companies and in training other pollution prevention technicians.

<2> Development of industrial waste management and treatment technologies and transfer to private companies

Industrial pollution prevention technologies suited to Sri Lanka's current conditions, and industrial waste management and treatment technologies in particular, are to be introduced from abroad, and in the medium to long term they are to be developed locally. These technologies will be transferred to private companies, and especially to small and medium scale enterprises with few capital or technological resources.

<3> Promotion of energy conservation

Energy conservation is directly related to the prevention of industrial pollution and the improvement of productivity. Therefore, in addition to industrial pollution prevention, private companies should be given assistance in purchasing energy conservation equipment and the encouragement of manufacturing techniques, and the government should take the initiative in promoting energy conservation measures as part of corporate activities.

<4> Installation of equipment for monitoring and prevention of industrial pollution

Equipment required for the training of technicians and the development of technologies should be installed to provide a full set of the basic equipment needed in this area. Equipment thought to be necessary in this regard is listed in Table 47.

(4) Effects

This programme is expected to be effective in the medium to long term in encouraging healthy industrial development while at the same time promoting pollution prevention and energy conservation measures. Further, it is expected to contribute to a raising of the national awareness of these problems among business people as well as other citizens.

(5) Action Plan

For the time being, work should focus on achieving a consensus within the government while at the same time drawing up a plan for implementation of the Technical Centre for pollution prevention.

4) Training of Management Personnel (Expansion of the NIBM)

(1) Background and Objectives

It is becoming urgent to train managers so as to help develop Sri Lankan industry, in particular, realise help create export industries in the future. The National Institute of Business Management (NIBM), an institute under the MIST, is running various training cources of business management and planning to expand its capabilities.

(2) Implementing Organisation

To be added to the existing NIBM. The NIBM functions as the national productivity centre for the Asian Productivity Organisation (APO) and until now has concerned itself mostly with practical training in business management techniques. Through these activities it has earned enough income to cover costs.

(3) Summary of Expansion Programme

<1> Evolution of the productivity improvement training programme

The NIBM, in addition to the business management training for mid-level managers at private businesses, is now trying to develop a training programme in modern business management techniques, and productivity improvement in particular, aimed at top management. In this respect, the organisation has plans to invite foreign experts to assist in programme development and instruction of the trainers.

<2> Training of management consultants

The NIBM is trying to provide training for management consultants in Sri Lanka, but at present their skills are insufficient. It is therefore calling for the cooperation of foreign experts in providing training for consultants well-versed in drawing up corporate diagnostic studies, restructuring plans, and business plans for the improvement of corporate performance.

<3> Development and dissemination of CAPM

The use of computers is indispensable to modern business management techniques, and in Sri Lanka as well the medium- to long-term need for such technology is expected to grow. In particular, calls can be heard for the development and dissemination of CAPM (Computer Aided Production Management). However, the NIBM possesses little experience or expertise in this field. Consequently, it is calling for the cooperation of foreign experts in conducting a survey regarding the development of a CAPM system that is suited to current conditions in Sri Lanka.

(4) Effects

The people required for improving productivity and corporate management, for which the need will rise in all industrial sectors in the future, will be trained.

(5) Action Plan

Implementation plan for the expansion programmes above should be formulated with advices by experts in business management.

5) Improvement of Infrastructure

(1) Background and Objectives

When economic and social development, in particular in the promotion of a strategy of creating export-oriented industries including foreign direct investment, construction of the proper infrastructure is an essential requirement. In view of the backwardness of Sri Lanka in this respect, infrastructure should be built over the medium and long term based on a master plan in each subsector of power supply, transportation, telecommunication, etc.

(2) Implementing Organisation

There are many administrative organisations involved, but from the viewpoint of the creation of export-oriented industries, it is desirable that MIST, in particular the Industrialisation Commission, take the initiative in this programme by optimum application of private sector resources including foreign capitals.

(3) Details of Programme

Infrastructure, in particular for the stable supply of electric power, transportation (roads, shipping, air freight), and telecommunications (telephones and telexes) should be improved. Improvements should be made in the reliability of services along with constructing the physical facilities.

(4) Effects

Improvement of infrastructure will not only make a wide-ranging contribution to the export industrialisation and development of the economy and society, but will also bring about an improvement in the living standards of the Sri Lankan people.

(5) Action Plan

Improvement of the infrastructure will require a great deal of funds and many years to complete. For the time being, therefore, the construction of industrial estates for with basic infrastructure-related facilities and efforts to attract companies to these estates would be effective in promoting industrialisation.

Action Plans for Medium and Long Term Priority Programmes

Programme	Implementing organisation	Action/Activity		
		Follow-up	Short-term (1 to 3 years)	Medium and long-term (4 years or more)
1) Development of Human Resources for Export Marketing • Training in trade • Area studies, foreign language training, etc.	MTC EDB	• Formulation of consensus in the Government • Deliberations with related domestic and foreign organisations • Formulation of basic concepts	• Strengthening of training facilities of EDB, etc. • Formulation of plan for setting up Trade Training Centre (provisional name) • Use of foreign cooperation schemes	• Establishment of Trade Training Centre or centre functions
2) Promotion of Standardisation and Quality Control (Expansion of SLSI) • Augmentation of testing, inspection and measuring equipment • Compliance with ISO 9000 and promotion of TQM	MIST SLSI	• Deliberations with related domestic and foreign organisations • Request for foreign assistance (experts and equipment) • Basic study (plan for compliance with ISO 9000 and promotion of TQM)	• Invitation of foreign experts • Oveseas training for SLSI staff • Formulation of implementation plan for compliance with ISO 9000 and promotionof TQM	• Establishment of testing, inspection and measurement functions • Implementation of ISO 9000 (inspection and certification) • Implementation of TQM
3) Prevention of Industrial Pollution and Promotion of Energey Conservation (Expansion of CISIR) • Development and training of technicians • Development of industrial waste management and treatment technologies • Promotion of energy conservation	CEA MIST CISIR	• Formulation of consensus in the Government • Deliberations with related domestic and foreign organisations • Formulation of implementation plan	• Invitation of foreign experts • Overseas training for CISIR staff • Development survey	• Establishment of Industrial Pollltion Prevention Technical Centre (provisional name) or centre functions
4) Training of Management Personnel (Expansionof NIBM) • Evolution of productivity improvement training programme • Training of management consultants • Development of CAPM	MIST NIBM	• Implementation of basic study • Formulation of implementation plans •Deliberations with related domestic and foreign organisations	• Invitation of foreign experts • Overseas training for NIBM staff	• Establishment of productivity centre (provisional name) or centre functions
5) Improvement of Infrastructure • Improvement of power supply, transportation, telecommunications, etc.	MIST Industrialisation Commission, etc.	• Formulation of implementation plans • Deliberations with related domestic and foreign organisations	• Promotion of industrial estates development	• Improvement of infrastructure

Tables

Table-1 Projected Exports in the Second National Export Development Plan

(Unit: Millions of constant 1989 Rs, %)

	Export values		Shares		Average annual growth rates	Contribution ratios to the growth
	1989	1994	1989	1994		(1989-1992)
Traditional exports	19,564	22,319	29.2	21.4	2.7	7.4
Tea	13,665	15,374	20.4	14.7	2.4	4.6
Rubber	3,111	3,451	4.6	3.3	2.1	0.9
Coconut	2,788	3,494	4.2	3.3	4.6	1.9
(Desiccated coconut)	1,023	1,402	1.5	1.3	6.5	1.0
(Other kernel products)	687	1,085	1.0	1.0	9.6	1.1
(Fibre, yarn, twine)	870	754	1.3	0.7	Δ2.8	Δ0.3
(Fibre finished goods)	50	95	0.1	0.1	13.8	0.1
(Shell charcoal)	158	158	0.2	0.1	0.0	0.0
Non-traditional exports	35,511	67,597	53.1	64.8	13.7	85.8
Other agricultural crops	2,318	3,645	3.5	3.5	9.5	3.6
Fisheries	835	1,425	1.2	1.4	11.3	1.6
Gems & jewellery	5,623	14,964	8.4	14.3	21.6	25.0
Textiles & garments	17,335	26,629	25.9	25.5	9.0	24.8
Garments	16,882	26,061	25.2	25.0	9.1	24.5
to U.S.A.	11,641	15,676	17.4	15.0	6.0	10.8
to EC	3,822	6,038	5.7	5.8	9.6	5.9
to Japan	225	1,684	0.3	1.6	49.5	3.9
Other manufactures	5,536	13,525	8.3	13.0	19.6	21.4
Food, beverages & tobacco	491	1,029	0.7	1.0	16.0	1.4
Leather products	476	1,023	0.7	1.0	16.9	1.5
Wood & wood products	307	667	0.5	0.6	16.8	1.0
Basic metal products	691	1,136	1.0	1.1	10.5	1.2
Ceramic products	458	1,029	0.7	1.0	17.6	1.5
Other minerals	504	777	0.8	0.7	9.1	0.7
Electronics & parts	50	376	0.1	0.4	50.0	0.9
Rubber-based products	739	2,445	1.1	2.3	27.0	4.6
Chemicals & plastics	897	1,956	1.3	1.9	16.9	2.8
Light engineering	403	1,014	0.6	1.0	20.3	1.6
Petroleum products	2,110	2,110	3.2	2.0	0.0	0.0
Total trad.& non-trad. (including others & re-exports)	55,075	89,916	82.3	86.2	10.3	93.1
Services	11,829	14,392	17.7	13.8	4.0	6.9
Total exports	66,904	104,308	100.0	100.0	9.3	100.0

Source: Sri Lanka Export Development Board, National Exoport Development Plan 1990-1994 Vol.I, Nov. 1990

Table-2 OECD Import of Garments and Apparel by Major Member Countries (1990)

(Unit: Billion US$)

SITC Codes	OECD Total	Japan	USA	Canada	Australia	Germany	U.K.	France	Italy
84	100.6	8.7	27.0	2.4	0.7	20.0	7.0	8.4	2.6
841	22.1	1.7	5.5	0.5	0.1	4.5	1.5	2.1	0.7
842	26.1	1.7	7.7	0.6	0.1	5.8	1.8	1.5	0.4
843	3.2	0.4	0.8	0.1	-	0.6	0.4	0.3	0.1
844	7.1	0.5	2.2	0.1	-	1.4	0.6	0.6	0.1
845	27.5	2.4	7.2	0.7	0.2	5.1	2.0	2.7	0.8
846	5.4	0.6	0.9	0.1	0.1	1.0	0.4	0.6	0.1
848	9.1	1.4	2.7	0.3	0.1	1.6	0.4	0.6	0.2

Remark: Garments and apparel are covered under the following codes of SITC (Rev. 3).

- 84 Articles of apparel and clothing accessories
- 841 For men or boys; not knitted or crocheted
- 842 For women or girls; not knitted or crocheted
- 843 For men or boys; knitted or crocheted
- 844 For women or girls; knitted or crocheted
- 845 Articles of apparel of textile fabrics, N.E.S. (babies' garments, jerseys, pullovers, T-shirts, brassieres, swimwear, etc.)
- 846 Clothing accessories (handkerchiefs, scarves, ties, stockings, socks, etc.)
- 848 Articles of aparel and clothing accessories of other than textile fabrics; headgear of all materials

Source: OECD Foreign Trade Statistics (Series B)

Table-3 OECD Import of Garmetns and Apparel by Major Member Countries (1990)

(Unit: Million US$, %)

	1985	1987	1988	1989	1990	Average annual growth rates
World exports total	47,147	77,258	83,717	94,244	109,003	18.9
OECD imports total	42,088	71,870	76,523	84,754	100,200	18.9
From non-OECD	24,460	40,995	44,739	51,593	57,798	18.8
From Asia	20,108	33,208	35,828	41,397	44,548	17.2
(Major countries/area)						
USA	16,201	22,116	21,692	26,026	26,977	10.7
From Asia	12,197	16,765	15,973	19,502	20,037	10.4
Japan	2,011	4,672	6,739	8,972	8,737	34.1
From Asia	1,660	3,927	5,658	7,283	6,522	31.5
EC	17,615	34,375	37,068	38,385	50,672	23.5
From Asia	4,201	9,090	10,482	10,621	13,436	26.2

Source: OECD Foreign Trade by Commodities, UN Monthly Bulletin of Statistics

Table-4 Japan's Import of Garments and Apparel from Sri Lanka

(Unit: Millions US$, %)

	1991		Three Largest Countries of Origin (Share)			Import from Sri Lanka	
	Value	Growth Rate				Rank	Share
Clothing (Except Knitwear)	4,689	7.1	(China) 40.9	(R Korea) 17.5	(Italy) 15.1	20	0.1
Outer Garments (Except Knitwear)	3,654	12.1	(China) 40.3	(R Korea) 16.7	(Italy) 15.6	21	0.1
Men's & Boys' Outer Garments	1,828	10.2	(China) 39.7	(R Korea) 20.3	(USA) 12.1	27	0.1
Women's & Girls' Outer Garments	1,825	14.2	(China) 40.9	(Italy) 19.1	(R Korea) 13.2	17	0.2
Women's & Girls' Overcoats etc.	376	14.2	(China) 42.4	(R Korea) 29.3	(Italy) 11.4	15	0.3
Women's & Girls' Suits, Dresses	543	27.6	(Italy) 30.3	(China) 27.5	(R Korea) 12.3	17	0.1
Women's & Girls' Skirts	577	11.5	(China) 53.8	(Italy) 14.4	(R Korea) 4.9	18	0.1
Women's & Girls' Blouses, Shirts	329	0.7	(China) 39.1	(Italy) 18.0	(R Korea) 10.7	16	0.3
Clothing Accessories (Except Knitwear)	496	-11.5	(Italy) 26.3	(R Korea) 26.2	(China) 21.1	19	0.2
Shawls, Scarves	89	-38.1	(Italy) 36.8	(R Korea) 20.3	(France) 16.5	8	0.8
Clothing & Clothing Accessories :Knitted	3,467	-18.8	(China) 34.4	(R Korea) 30.2	(Italy) 7.8	18	0.1
Outer Garments (Knitted)	807	22.1	(R Korea) 33.5	(China) 21.3	(Italy) 11.0	13	0.5
Women's Outer Garments (Knitted)	432	18.4	(R Korea) 37.6	(China) 20.4	(Italy) 14.7	11	0.8
Women's Dress, Skirts (Knitted)	106	18.7	(R Korea) 26.9	(Italy) 24.3	(China) 19.1	12	0.6
Women's Shirts or Blouse (Knitted)	210	16.7	(R Korea) 45.8	(China) 17.9	(Italy) 10.6	11	0.9
Clothing & Clothing Accessories Total	8,157	11.8	(China) 38.1	(R Korea) 22.9	(Italy) 12.0	21	0.1

Remark: Items are selected for those with Sri Lanka's share being 0.1% or more.

Source: JETRO NBDC System Based on Foreign Trade Statistics by Ministry of Finance

Table-5 Export of Sri Lanaka by Major Products

	Values (Millions of Rs)			Shares (%)		
	1989	1990	1991	1989	1990	1991
Agricultural crops	22,049	28,886	26,537	39.2	36.3	31.5
Tea	13,664	19,823	17,867	24.3	24.9	21.2
Rubber	3,112	3,080	2,641	5.5	3.9	3.1
Coconut	2,865	2,783	2,619	5.1	3.5	3.1
Mineral products	2,693	3,484	2,562	4.8	4.4	3.0
Gems	2,204	2,933	2,353	3.9	3.7	2.8
Manufactured products	28,470	41,510	50,736	50.7	52.2	60.1
Textile products	17,631	25,163	33,261	31.4	31.6	39.4
Garments and apparel	16,916	24,287	31,652	29.7	30.6	37.5
Petroleum products	2,242	3,974	3,289	4.0	5.0	3.9
Diamond	3,258	3,684	2,807	5.8	4.6	3.3
Machinery, mechanical and electrical appliances	705	2,379	2,650	1.3	3.0	3.1
Food, beverages and tobacco	1,000	1,270	1,471	1.8	1.6	1.7
Rubber-based products	932	1,198	1,247	1.7	1.5	1.5
Ceramic products	477	735	1,173	0.8	0.9	1.4
Jewellery	111	142	129	0.2	0.6	0.2
Others	2,963	5,601	4,543	5.3	7.1	5.4
Total	56,175	79,481	84,378	100.0	100.0	100.0

Remark: The figures for 1991 are tentative.
Source: Central Bank of Sri Lanka, Annual Report 1991

Table-6 Export of Garments and Apparel from Sri Lanka by Major Destinations

(Qty: Million pieces, Value: Million Rs.)

	1987			1988			1989			1990			1991		
	Qty	Value	%	Qty	Value	%	Qty	Value	%	Qty	Value	%	Qty	Value	%
U.S.A.	108	8,331	67.3	102	8,988	66.2	106	11,640	68.9	124	16,571	66.4	125	19,003	60.1
EC	80	3,165	25.5	63	3,685	27.1	60	4,029	23.9	69	6,647	26.6	96	10,214	32.3
Canada	6	323	2.6	5	357	2.6	4	418	2.5	4	666	2.7	5	775	2.5
Sweden	1	104	1.0	1	84	0.6	1	113	0.7	1	196	0.8	1	347	1.1
Norway	1	54	0.4	1	36	0.3	1	65	0.3	5	94	0.4	1	153	0.5
Japan	-	-	-	2	86	0.6	5	225	1.3	6	261	1.0	5	421	1.3
Others	11	406	3.2	1	345	2.6	8	403	2.4	3	497	2.0	9	713	2.3
Total	187	12,383	100.0	185	13,581	100.0	185	16,893	100.0	212	24,932	100.0	242	31,626	100.0

Source: Sri Lanka Customs

Table-7 Sri Lanka's Promising Apparel (Examples) for the Japanese Market

Promising Items	Men's	Ladies'	Children's
JACKET (SHELI, FABRICS; PE100, C100, T/C JACKET WITH PADDING LINED JACKET UN-LINED JACKET	O	O	OO
SKI-WEAR (PE100)	O	O	OOO
WOVEN CASUAL WEAR SHIRTS & BLOUSE PANTS & SKIRT ONE PIECE, DRESS SUIT	O	OO	OOO
KNITTED CASUAL WEAR (C100 ETC.) T-SHIRTS, PORO SHIRTS TRAINER, JOGGING WEAR	O	OO	O
SYNTHETIC WOVEN WEAR (PE100 ETC.) BLOUSE, SKIRT, PANTS		OOO	
DENIM WEAR PANTS, SKIRT, JACKET	O	OO	OOO

Remark: Numbers of circulars indicate promising degrees by items.
Source: Comments by Japanese experts who visited factories in Sri Lanka to provide technological guidance.

Table-8 Merchandising Time Schedule for the Japanese Apparel Market

Month	1	2	3	4	5	6	7	8	9	10	11	12

FOR WINTER SEASON

1) SAMPLE MAKING

2) BOOKING

3) MATERIAL & ACCES. ORDERING

4) MATERIAL & ACCES. PRODUCTION & SHIPMENT

5) PRODUCTION

6) SHIPMENT

7) SALES TIME

FOR SPRING SEASON

1) SAMPLE MAKING

2) BOOKING

3) MATERIAL & ACCES. ORDERING

4) MATERIAL & ACCES. PRODUCTION & SHIPMENT

5) PRODUCTION

6) SHIPMENT

7) SALES TIME

Table-9 Examples of Production Management Problems and Solutions in the Garments and Apparel Industry (1/2)

	Problems	Measures
Fabrics and Auxiliary Materials	• Problems arising from defects in fabrics (uneven dyeing, stained fabrics, weaving cracs, uneven weaving, biased knit fabrics, fabrics with different lengths and widths, insufficient color fastness for washing and rubbing, etc.) • Troubles with auxiliary materials and accessories (snap buttons of uneven hardness, poor quality fasteners, thin inner linings, etc.)	• Selection of reliable suppliers of good quality fabrics and auxiliary materials • Implementation of in-house inspection of fabrics and auxiliary materials before cutting, sewing or putting on
Work Environment	• Poor lighting (i.e., areas for sewing, band knives, inspection and trimming. Officies and meeting rooms are poorly lit in general.) • Low production efficiency and troubles with finishing, such as stains in rooms kept at unusually high temperatures (especially in pressing areas)	• Installation of proper lighting • Maintenance of proper in-house temperature
Production Efficiency	• Inefficient production lines and process layouts (improper layouts of production processes, position and direction of machines, etc.) • Shortage of proper machinery and equipment (multi-needle sewing machines, rail cutters, etc.) • Lack of in-house communication (workers' indifference to linkage of processes)	• Arrangements for efficient production lines and use of side tables, bins, waste boxes, etc. • Arrangements for and maintenance of proper machinery and equipment • Maintenance of good communication and sharing of information with workers in factories

Table-9 Examples of Production Management Problems and Solutions in the Garments and Apparel Industry (2/2)

	Problems	Measures
Quality Control	• Lack of awareness of the need to identify causes for defects and find measures to solve or improve (For example, stains are caused by machine oil or dust on the floor. Broken needles, pins, staples, etc. left in garments reflect improper management of these materials.)	• Proper organisation, orderliness, cleanliness, and neatness of factories and proper management of needles, pins, staples, etc. including arrangements for iron detectors.
	• Insufficient awareness or knowledge of required quality and inspection standards in foreign countries, including Japan	• Recognition of requirements for foreign countries and implementation of required quality control
	• Lack of detailed quality checks and sophisticated workmanship required for the Japanese market (insufficient trimming, sewing thread breaks, needle holes, skip stiching, broken fabrics, incorrect positioning of buttons, etc. are not acceptable)	• Implementation of detailed quality checks
	• Dependance on inspection at the final stage of finishing (resulting in losses and inefficiency in when defects are produced prior to finishing)	• Implementation of inspections at various stages of processes, including inspection of fabrics

Source: Comments by Japanese experts who visited garment factories in Sri Lanka to provide technological guidance.

Table-10 OECD Import of Gems and Jewellery by Major Member Countries (1990)

(Unit: Million US$)

SITC Codes	OECD Total	Japan	USA	Canada	Australia	Germany	U.K.	France	Italy
667.2&3~ 897.3&4	31,714	156	1,669	56	127	681	3,946	628	2,494
667.2 ~3	24,187	138	1,249	30	122	214	3,773	102	14
667.2	22,005	134	1,095	26	78	120	3,701	56	11
667.3	2,182	4	154	4	44	94	72	46	3
897.3 ~4	7,527	18	420	26	5	467	173	526	2,480
897.3	7,376	17	415	24	5	441	156	497	2,458
897.4	151	1	5	2	-	26	17	29	22

Remark: Gems and Jewellery are covered under the following codes of SITC (Rev.3).
667.2 Diamonds, Whether or Not Worked,
667.3 Precious & Semi-precious Stones
897.3 Jewellery of Gold, Silver, Platinum Group Metals & Goldsmiths', etc.
897.4 Other Articles of Precious Metal/Rolled Precious Metals, N.E.S.

Source: OECD Foreign Trade Statistics (Series B)

Table-11 OECD Import of Gems and Jewellery by Items

1) Diamonds, Whether or Not Worked (SITC 667.2)

(Unit: Million US$)

		1988		1989		1990
OECD Total		19,233		20,867		22,005
Top Ten Countries /Area of Origin	U King	3,021	U King	3,245	U King	3,701
	Israel	2,460	Israel	2,692	Israel	2,813
	Bel Lux	2,184	India	2,442	Bel Lux	2,465
	India	2,116	Bel Lux	2,397	India	2,244
	USA	792	USA	989	USA	1,095
	S Africa	684	S Africa	816	S Africa	695
	Switzld	613	Libya	611	Bermuda	662
	Bermuda	608	Switzld	602	Switald	604
	USSR	573	Bermuda	599	USSR	501
	Hong Kong	410	USSR	462	Hong Kong	420
From Major Asian Countries/Areas						
Thailand		82		162		228
Philippines		1		3		4
Malaysia		34		52		73
Indonesia		1		0		1
Singapore		13		43		60
Sri Lanka		51		84		93
India		2,116		2,442		2,244
China		11		6		11
R Korea		0		0		1
Taiwan		1		3		4
Hong Kong		410		413		420

Source: OECD Foreign Trade Statistics (Series B)

2) Precious & Semi-precious Stones (SITC 667.3)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		1,679		1,977		2,182
Top Ten Countries /Area of Origin	Thailand	351	Thailand	426	Thailand	544
	Colombia	185	Hong Kong	228	Hong Kong	197
	Hong Kong	166	Colombia	202	Colombia	181
	Switzld	116	Switzld	147	Switzld	168
	Brazil	107	USA	130	USA	154
	USA	84	Brazil	118	Brazil	130
	Germany	77	Germany	91	Germany	94
	U King	64	India	80	India	84
	India	64	Israel	63	Sri Lanka	73
	Sri Lanka	55	U King	60	U King	72
From Major Asian Countries/Areas						
Thailand		351		426		544
Philippines		1		1		1
Singapore		3		3		6
Sri Lanka		55		56		73
India		64		80		84
China		3		4		4
R Korea		5		4		7
Taiwan		11		8		10
Hong Kong		166		228		197

Source: OECD Foreign Trade Statistics (Series B)

3) Jewellery of Gold, Silver, Platinum Group Metals & Goldsmiths' (SITC 897.3)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		3,392		6,623		7,376
Top Ten Countries /Area of Origin	Italy	925	Italy	2,351	Italy	2,458
	Germany	341	Hong Kong	637	Hong Kong	647
	Hong Kong	321	France	445	Thailand	536
	France	262	Thailand	440	France	497
	Brunei	259	Germany	382	Germany	441
	USA	181	USA	306	USA	415
	Thailand	169	Brunei	301	Brunei	239
	U King	147	Switzld	241	Switzld	219
	Switzld	145	Israel	199	Israel	214
	S Arabia	106	U King	168	Singapore	204
From Major Asian Countries/Areas						
Thailand		169		440		536
Philippines		0		2		3
Malaysia		6		28		23
Indonesia		5		9		11
Singapore		35		76		204
Sri Lanka		2		2		3
India		37		101		150
China		8		14		24
R Korea		3		20		28
Taiwan		13		28		26
Hong Kong		321		637		647

Source: OECD Foreign Trade Statistics (Series B)

Table-12 Japan's Import of Gems and Jewellery by Items

1) Diamonds, Whether or Not Worked (SITC 667.2)

(Unit: Million US$)

	1988		1989		1990	
World Total		2,078		2,233		2,547
Top Ten Countries /Area of Origin	Bel Lux	570	Bel Lux	637	Bel Lux	682
	India	556	India	601	Israel	657
	Israel	527	Israel	567	India	629
	USA	221	USA	242	USA	301
	Hong Kong	67	USSR	54	Hong Kong	83
	USSR	55	Hong Kong	50	USSR	61
	Thailand	25	Thailand	30	Thailand	45
	U King	24	U King	24	U King	21
	Nethlds	8	Nethlds	8	Switzld	14
	Switzld	8	Sri Lanka	4	Singapore	12
From Major Asian Countries/Areas						
Thailand		25		30		45
Singapore		3		1		12
Sri Lanka		1		4		5
India		556		601		629
China		1		1		2
Hong Kong		67		50		83

Source: OECD Foreign Trade Statistics (Series B)

2) Precious & Semi-precious Stones (SITC 667.3)

(Unit: 1,000 US$)

	1988		1989		1990	
World Total		471,009		519,025		609,405
Top Ten Countries /Area of Origin	Thailand	154,037	Thailand	196,651	Thailand	224,007
	Colombia	98,325	Colombia	99,806	Colombia	102,235
	Hong Kong	64,803	Hong Kong	71,915	Hong Kong	93,425
	Sri Lanka	42,190	Sri Lanka	32,416	Sri Lanka	41,293
	Australia	32,668	Australia	30,856	Australia	31,139
	Brazil	23,578	Brazil	25,443	Brazil	28,663
	India	13,448	India	15,980	India	18,815
	USA	10,766	Germany	10,809	USA	15,161
	Germany	7,693	USA	6,730	Germany	11,769
	Burma	5,971	Burma	5,850	Myanmar	9,761
From Asian Countries/Areas						
Thailand		154,037		196,651		224,007
Philippines		-		10		57
Malaysia		22		188		162
Indonesia		-		7		35
Singapore		922		1,810		2,313
Sri Lanka		42,190		32,416		41,293
India		13,448		80,086		18,815
China		2,034		3,588		1,532
R Korea		976		982		993
Taiwan		1,293		1,383		2,200
Hong Kong		64,803		71,915		93,425

Source: OECD Foreign Trade Statistics (Series B)

3) Jewellery of Gold, Silver, Platinum Group Metals & Goldsmiths' (SITC 897.3)

(Unit: 1,000 US$)

		1988		1989		1990
World Total		528,742		725,518		873,555
Top Ten Countries /Area of Origin	Hong Kong	184,852	Hong Kong	208,236	Hong Kong	208,527
	Italy	141,728	Italy	171,142	Italy	186,635
	Thailand	67,671	Thailand	97,769	USA	124,593
	France	45,421	USA	86,169	Thailand	110,473
	USA	31,574	France	65,207	France	98,407
	Switzld	9,705	Germany	15,748	Switzld	22,961
	Germany	9,453	Switzld	15,483	Spain	21,371
	Singapore	7,524	Spain	10,668	Singapore	19,565
	Spain	6,692	Singapore	10,538	Germany	19,222
	U King	6,442	U King	10,416	U King	18,631
From Asian Countries/Areas						
Thailand		67,671		97,769		110,473
Philippines		56		81		402
Malaysia		195		222		313
Indonesia		2,333		102		125
Singapore		7,524		10,538		19,565
Sri Lanka		299		229		814
India		1,019		8,136		13,199
China		339		3,779		2,228
R Korea		1,795		3,007		2,634
Taiwan		3,383		5,046		4,761
Hong Kong		184,852		208,236		208,527

Source: OECD Foreign Trade Statistics (Series B)

Table-13 USA's Import of Gems and Jewellery by Items

1) Diamonds, Whether or Not Worked (SITC 667.2)

(Unit: Million US$)

		1988		1989		1990	
World Total			4,325		4,375		3,998
Top Ten Countries /Area of Origin	Israel		1,224	Israel	1,293	Israel	1,178
	Bel Lux		1,101	India	1,117	Bel Lux	1,010
	India		1,002	Bel Lux	1,082	India	917
	U King		387	U King	300	U King	350
	Switzld		141	Angola	243	Ghana	86
	Hong Kong		104	Switzld	101	Switzld	81
	S Africa		91	Hong Kong	68	Hong Kong	79
	Zaire		50	Zaire	63	Zaire	66
	Nethlds		48	Nethlds	46	Nethlds	40
	Brazil		33	Ghana	42	S Africa	27
From Major Asian Countries/Areas							
Thailand			10		12		11
Singapore			2		4		4
Sri Lanka			0		0		0
India			1,002		1,117		917
China			1		0		1
R Korea			0		0		0
Taiwan			0		1		0
Hong Kong			104		68		79

Source: OECD Foreign Trade Statistics (Series B)

2) Precious & Semi-precious Stones (SITC 667.3)

(Unit: Million US$)

		1988		1989		1990
World Total		461		546		523
Top Ten Countries /Area of Origin	Thailand	109	Thailand	115	Thailand	148
	Colombia	67	Colombia	84	Colombia	61
	Brazil	47	Switzld	67	Switzld	61
	Switzld	46	Brazil	57	Brazil	57
	Hong Kong	43	Hong Kong	53	Hong Kong	37
	Israel	29	Israel	37	India	34
	India	27	India	33	Israel	26
	Germany	20	Germany	28	Germany	24
	U King	11	Sri Lanka	12	Sri Lanka	16
	France	9	France	10	U King	13
From Major Asian Countries/Areas						
Thailand		109		115		148
Singapore		1		-		2
Sri Lanka		5		12		16
India		27		33		34
China		1		1		1
R Korea		3		3		3
Taiwan		7		4		3
Hong Kong		43		53		37

Source: OECD Foreign Trade Statistics (Series B)

3) Jewellery of Gold, Silver, Platinum Group Metals & Goldsmiths' (SITC 897.3)

(Unit: Million US$)

		1989		1990
World Total		2,393		2,347
Top Ten Countries /Area of Origin	Italy	1,181	Italy	1,082
	Hong Kong	259	Hong Kong	258
	Thailand	200	Thailand	226
	Israel	156	Israel	157
	Peru	113	Peru	116
	Domi-Rep	80	Domi-Rep	76
	Mexico	47	India	71
	India	47	Mexico	41
	Spain	25	France	29
	France	22	Turkey	23
From Major Asian Countries/Areas				
Thailand		200		226
Philippines		1		1
Malaysia		10		14
Indonesia		4		4
Singapore		10		6
Sri Lanka		0		0
India		47		71
China		2		6
R Korea		16		23
Taiwan		9		8
Hong Kong		259		258

Source: OECD Foreign Trade Statistics (Series B)

Table-14 U.S. Trade Patterns of Jewellery in 1990

(Unit: Million dollars, %)

Exports			Imports		
	Value	Share		Value	Share
Canada & Mexico	54	9.9	Canada & Mexico	77	2.5
European Community	101	18.6	European Community	1,231	40.7
Japan	150	27.6	Japan	29	1.0
East Asia NIEs	57	10.6	East Asia NIEs	1,000	33.0
South America	22	4.1	South America	166	5.5
Other	159	29.3	Other	524	17.3
World Total	542	100.0	World Total	3,028	100.0
Top Five Countries					
	Value	Share		Value	Share
Japan	150	27.6	Italy	1,090	36.0
Switzerland	95	17.5	Hong Kong	368	12.2
Hong Kong	36	6.7	Thailand	271	9.0
France	33	6.1	Israel	158	5.2
Canada	30	5.5	Korea, South	155	5.1

Source: U.S. Department of Commerce: Bureau of the Census; International Trade Administration.

Table-15 OECD Import of Rubber-based Products by Major Member Countries (1990)

(Unit: Million US$)

SITC Codes	OECD Total	Japan	USA	Canada	Australia	Germany	U.K.	France	Italy
621, 625 &629	20,363	2,288	1,843	884	38	3,055	1,421	2,701	1,554
621	3,254	175	452	85	3	607	206	305	396
625	13,008	1,736	893	645	28	1,657	959	2,009	805
629	4,101	377	498	154	7	791	256	387	353

Remark: Rubber-based Products are covered under the following codes of SITC (Rev. 3).

621 Materials of Rubber

625 Rubber Tyres, Interchangeble Tyres, Tyre Flaps & Inner Tubes

629 Articles of Rubber, N.E.S.

Source: OECD Foreign Trade Statistics (Series B)

Table-16 OECD Import of Rubber-based Products

(Unit: Millions US$, %)

	1985	1987	1988	1989	1990	Average Annual Growth Rates (1985-1989)
World Exports Total	10,056	15,030	17,489	17,997		15.6
OECD Imports Total	8,001	12,768	14,967	15,753	20,234	17.2
From Non-OECD	1,150	1,673	2,035	2,129	2,358	15.3
From Asia	719	1,017	1,261	1,281	1,473	15.4
(Major Countries/Area)						
USA	2,639	3,149	3,456	3,816	3,764	7.4
From Asia	481	533	575	546	596	4.4
Japan	186	437	600	707	743	31.9
From Asia	23	63	100	117	132	41.8
EC	4,376	7,937	9,290	9,428	11,411	21.1
From Asia	121	276	373	384	496	32.6

Source: OECD Foreign Trade by Commodities, UN Monthly Bulletin of statistics

Table-17 OECD Import of Rubber-based Products by Items

1) Materials of Rubber (SITC 621)

(Unit: Million US$)

		1988		1989		1990
OECD Total		2,434		593		3,254
Top Ten Countries /Area of Origin	Germany	491	Germany	499	Germany	607
	USA	373	USA	428	USA	452
	Italy	309	Italy	348	Italy	396
	France	214	France	236	France	305
	Bel Lux	191	Bel Lux	191	Bel Lux	221
	U King	159	U King	167	U King	206
	Nethlds	99	Japan	156	Japan	175
	Sweden	94	Nethlds	109	Nethlds	131
	Austria	93	Sweden	94	Austria	117
	Japan	72	Austria	93	Sweden	106
From Major Asian Countries/Areas						
Thailand		7		14		10
Philippines		0		0		0
Malaysia		21		46		64
Indonesia		0		1		1
Singapore		2		1		2
Sri Lanka		0		0		1
India		0		1		1
China		4		2		2
R Korea		7		18		0
Taiwan		12		26		19
Hong Kong		1		2		1

Source: OECD Foreign Trade Statistics (Series B)

2) Rubber Tyres, Interchangeable Tyres, Tyre Flaps & Inner Tubes (SITC 625)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		11,276		11,774		13,008
Top Ten Countries /Area of Origin	France	1,778	France	1,768	France	2,009
	Japan	1,534	Japan	1,704	Japan	1,736
	Germany	1,524	Germany	1,474	Germany	1,657
	U King	791	U King	843	U King	959
	Italy	732	USA	842	USA	893
	USA	702	Italy	741	Italy	805
	Spain	657	Spain	672	Spain	768
	R Korea	501	Canada	608	Canada	645
	Bel Lux	477	R Korea	503	R Korea	583
	Canada	458	Bel Lux	462	Bel Lux	528
From Major Asian Countries/Areas						
Thailand		22		38		60
Philippines		3		6		7
Malaysia		12		15		17
Indonesia		20		30		31
Singapore		20		14		17
Sri Lanka		11		13		19
India		26		30		29
China		5		7		10
R Korea		501		503		583
Taiwan		221		216		256
Hong Kong		2		1		2

Source: OECD Foreign Trade Statistics (Series B)

3) Articles of Rubber, N.E.S. (SITC 629)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		2,661		3,460		4,101
Top Ten Countries /Area of Origin	Fr Germ	576	Fr Germ	649	Fr Germ	791
	USA	415	USA	456	USA	498
	France	261	Japan	338	France	387
	Italy	239	France	304	Japan	377
	U King	181	Italy	276	Italy	353
	Japan	162	U King	217	U King	256
	Bel Lux	114	Bel Lux	125	Bel Lux	157
	Nethlds	96	Taiwan	122	Canada	154
	Sweden	93	Sweden	116	Taiwan	132
	Austria	74	Nethlds	106	Sweden	128
From Major Asian Countries/Areas						
Thailand		17		34		41
Philippines		1		2		3
Malaysia		21		27		33
Indonesia		1		2		3
Singapore		8		24		24
Sri Lanka		5		7		8
India		4		5		5
China		4		8		11
R Korea		35		58		59
Taiwan		48		122		132
Hong Kong		4		7		7

Source: OECD Foreign Trade Statistics (Series B)

Table-18 Japan's Import of Rubber-based Products by Major Origins

1) Materials of Rubber (SITC 621)

(Unit: 1,000 US$)

	1988		1989		1990	
World Total		47,417		57,451		63,985
Top Ten Countries /Area of Origin	USA	19,700	USA	25,046	USA	29,020
	Malaysia	6,249	Malaysia	6,456	Germany	7,001
	Germany	5,066	Italy	6,073	Malaysia	6,428
	R Korea	4,899	R Korea	5,978	Italy	6,021
	Italy	4,175	Germany	5,537	R Korea	4,924
	Taiwan	1,415	U King	2,086	U King	2,464
	U King	1,302	Taiwan	1,580	Thailand	1,684
	Singapore	625	France	939	France	1,140
	France	586	Thailand	695	Taiwan	1,061
	Thailand	508	Sweden	622	Nethlds	890
From Major Asian Countries/Areas						
Thailand		508		13,855		1,684
Philippines		-		161		-
Malaysia		6,249		40,629		6,428
Indonesia		-		942		79
Singapore		625		1,394		585
Sri Lanka		349		446		-
India		-		514		-
China		474		1,908		336
R Korea		4,899		18,271		4,924
Taiwan		1,415		25,898		1,061
Hong Kong		4		1,836		46

Source: OECD Foreign Trade Statistics (Series B)

2) Rubber Tyres, Interchangeable Tyres, Tyre Flaps & Inner Tubes (SITC 625)

(Unit: 1,000 US$)

		1988		1989		1990
World Total		463,741		544,413		543,520
Top Ten Countries /Area of Origin	USA	153,869	USA	204,255	USA	200,016
	Austria	70,833	Austria	81,164	Austria	95,014
	Germany	61,095	Germany	67,910	Germany	67,634
	Italy	54,543	Italy	53,706	Italy	44,071
	R Korea	32,342	R Korea	33,229	R Korea	32,812
	Spain	18,216	France	21,716	France	25,029
	France	16,316	U King	14,835	Taiwan	17,390
	Taiwan	14,063	Spain	14,596	Spain	15,648
	U King	12,904	Taiwan	13,608	U King	10,001
	Australia	8,647	Canada	10,153	Australia	9,225
From Major Asian Countries/Areas						
Thailand		2,640		4,188		4,494
Philippines		584		3,770		3,938
Malaysia		523		1,427		1,495
Indonesia		3,045		3,147		3,436
Singapore		704		522		619
Sri Lanka		264		408		383
India		2		-		-
China		-		18		14
R Korea		32,342		33,229		32,812
Taiwan		14,063		216,156		17,390
Hong Kong		477		93		29

Source: OECD Foreign Trade Statistics (Series B)

3) Articles of Rubber, N.E.S. (SITC 629)

(Unit: 1,000 US$)

		1988		1989		1990
World Total		89,321		105,083		135,494
Top Ten Countries /Area of Origin	USA	25,927	USA	30,228	USA	40,707
	Taiwan	11,862	Taiwan	14,205	Taiwan	17,053
	Germany	9,723	Germany	10,783	Germany	16,992
	U King	7,121	R Korea	10,019	Malaysia	13,912
	R Korea	7,061	Malaysia	9,361	R Korea	11,050
	Malaysia	6,911	U King	7,069	Switzld	6,165
	Switzld	4,757	Switzld	4,912	U King	5,064
	Austria	3,006	Singapore	3,912	Sweden	5,055
	Sweden	2,964	Sweden	3,749	Singapore	4,920
	Singapore	2,396	Austria	2,360	Austria	2,314
From Major Asian Countries/Areas						
Thailand		1,171		1,745		2,047
Philippines		164		297		584
Malaysia		6,911		9,361		13,912
Indonesia		975		663		1,217
Singapore		2,396		3,912		4,920
Sri Lanka		78		121		109
India		21		9		39
China		514		450		1,472
R Korea		7,061		10,019		11,050
Taiwan		11,862		14,205		17,053
Hong Kong		229		205		74

Source: OECD Foreign Trade Statistics (Series B)

Table-19 Japan's Import of Rubber-based Products by Items

1) Tubes, pipes and hose of vulcanised rubber (HS 4009. 10-0000)

(Unit: ¥1,000)

	1989		1990		1991	
Total		425,188		635,671		659,333
Top Five Countries /Area of Origin	USA	176,547	USA	297,869	USA	250,728
	Germany	70,994	Germany	85,998	Germany	114,414
	U King	44,789	U King	60,514	R Korea	61,936
	Thailand	32,583	Thailand	54,575	Singapore	57,108
	Sweden	29,826	Sweden	32,356	Taiwan	51,139
ASEAN	Malaysia	5,529	Indonesia	5,973	Thailand	35,765
	Indonesia	643	Malaysia	300	Indonesia	6,252
					Malaysia	2,478

2) V-belts and V-belting of trapezoidal cross-section (HS 4010. 10-000)

(Unit: ¥1,000)

	1989		1990		1991	
Total		2,003,497		2,404,721		2,674,045
Top Five Countries /Area of Origin	USA	872,589	USA	1,122,412	USA	1,323,204
	Singapore	319,594	Singapore	428,114	Austria	315,062
	Austria	297,712	Austria	271,244	Germany	289,652
	Germany	168,427	Germany	223,863	Singapore	271,360
	Taiwan	105,083	Indonesia	99,750	Indonesia	156,760
ASEAN	Thailand	67,848	Thailand	74,615	Thailand	155,820
	Indonesia	54,624	Malaysia	25,174	Malaysia	31,282
	Malaysia	11,783				

3) New pneumatic tyres, of rubber, of a kind used on bicycles (HS 4011. 50-000)

(Unit: ¥1,000)

	1989		1990		1991	
Total		1,865,557		2,046,751		2,526,573
Top Five Countries /Area of Origin	R Korea	977,422	R Korea	992,635	R Korea	1,189,433
	Philippines	365,389	Philippines	376,626	Philippines	467,866
	Taiwan	239,532	Taiwan	274,939	Taiwan	439,522
	Italy	118,040	Italy	161,036	Indonesia	140,736
	France	89,436	Indonesia	85,924	Italy	133,538
ASEAN	Indonesia	34,290	Thailand	76,467	Thailand	31,096
	Malaysia	19,359				
	Thailand	9,644				

4) Solid or cushion tyres, of rubber; tyre flaps (HS 4012. 90-010)

(Unit: ¥1,000)

	1989		1990		1991	
Total		75,857		86,774		76,459
Top Five Countries /Area of Origin	Sri Lanka	24,127	R Korea	55,964	R korea	61,309
	R Korea	14,072	Sri Lanka	13,980	USA	5,258
	USA	14,031	France	8,364	Sri Lanka	4,774
	Belgium	11,204	Italy	2,575	Spain	3,031
	France	2,909	Spain	1,311	Germany	742
ASEAN	Malaysia	1,848	Thailand	237		

5) Gloves, of vulcanised rubber, for other use (HS 4015.19-000)

(Unit: ¥1,000)

	1989		1990		1991	
Total		2,468,266		2,671,072		2,554,698
Top Five Countries /Area of Origin	Malaysia	1,194,847	Malaysia	1,236,431	Malaysia	1,062,855
	Thailand	413,627	Thailand	707,545	Thailand	830,305
	USA	208,804	USA	245,225	USA	227,427
	R Korea	203,305	Austria	133,328	Taiwan	155,862
	Taiwan	192,600	Taiwan	122,449	Austria	108,967
ASEAN	Indonesia	2,447				
Sri Lanka		6,116		4,813		18,559

6) Floor covering and mats (HS 4016.91-020)

(Unit: ¥1,000)

	1989		1990		1991	
Total		283,263		482,985		389,561
Top Five Countries /Area of Origin	USA	100,418	Taiwan	173,833	USA	140,777
	Taiwan	70,027	USA	163,999	Taiwan	90,259
	Germany	40,315	Germany	94,525	Germany	89,774
	R Korea	35,058	R Korea	12,026	R Korea	15,375
	U King	9,810	Malaysia	10,405	Italy	14,198
ASEAN	Malaysia	8,953	Indonesia	3,761	Indonesia	7,235
	Thailand	2,735	Thailand	1,955	Thailand	6,937
					Malaysia	6,623

7) Erasers (HS 4016. 92-000)

(Unit: ¥1,000)

	1989		1990		1991	
Total		94,428		59,476		114,958
Top Five Countries /Area of Origin	Taiwan	39,218	Taiwan	24,188	Taiwan	36,653
	Germany	25,091	USA	15,528	China	36,292
	USA	23,981	R Korea	13,697	Germany	19,343
	R Korea	4,679	Germany	5,826	R Korea	14,159
	U King	670	China	237	USA	7,787
ASEAN	Malaysia	8,953	Indonesia	3,761	Indonesia	7,235
	Thailand	2,735	Thailand	1,955	Thailand	6,937
					Malaysia	6,623

8) Other articles, parts and accessories of a kind used for motor vehicles, of valcanised rubber (HS 4016. 99-010)

(Unit: ¥1,000)

	1989		1990		1991	
Total		928,755		1,583,109		2,427,964
Top Five Countries /Area of Origin	Germany	263,238	Taiwan	548,169	Taiwan	664,658
	Taiwan	253,577	Germany	505,355	R Korea	475,892
	R Korea	252,796	R Korea	380,313	Germany	445,202
	USA	51,768	USA	180,563	Malaysia	241,840
	U King	38,302	Malaysia	63,367	USA	233,282
ASEAN	Thailand	8,844	Thailand	20,426	Thailand	32,467
	Malaysia	5,922	Indonesia	300	Indonesia	1,687
	Indonesia	671				

9) Other articles, of vulcanised rubber (HS 4016. 99-020)

(Unit: ¥1,000)

	1989		1990		1991	
Total		4,034,072		5,236,714		5,152,401
Top Five Countries /Area of Origin	USA	1,026,045	USA	1,332,046	USA	1,420,216
	Malaysia	831,047	Malaysia	1,030,080	Malaysia	1,261,198
	Taiwan	735,666	Taiwan	856,649	Taiwan	692,238
	Germany	389,814	Germany	649,996	Germany	470,293
	R Korea	307,549	R Korea	311,268	R Korea	309,388
ASEAN	Thailand	120,144	Thailand	122,034	Thailand	200,579
	Indonesia	2,863	Indonesia	18,962	Indonesia	28,894
Sri Lanka		16,741		15,746		22,445

Source: Exports and Imports of Japan

Table-20 Rubber-based Products Industry in Sri Lanka

Industries (ISIC No)	(1). Manufacturing (3)	(2). Rubber products (355)	(2)/(1)
Establishments	100,340	9,691	9.6%
Persons Engaged	586,757	47,926	8.2%
Persons Engaged per Establishment	5.8	4.9	
Value of Output (Million Rs)	47,933	1,870	
Value of Input (Million Rs)	30,716	693	
Input/Output Ratio	0.64	0.37	
Value Added (Rs)	17,217	1,177	6.8%
Value Added per Establishment (Rs)	171,583	121,471	
Value Added per Engaged Person (Rs)	29,342	24,562	
No. of Establishments with less than 5 Persons Engaged	86,091	9,053	10.5%
It's Share in Total Establishments	85.8%	93.4%	

Source: Census of Industry 1983

Table-21 Export of Rubber-based Products from Sri Lanka

(Unit: Millions of Rs)

	1980	1982	1984	1986	1987	1988	1989	1990
Rubber Thread	12.3	6.9	0.2	-	0.2	-	-	-
Hose	-	1.2	-	0.7	-	0.9	-	0.1
Belt	-	13.1	3.5	0.2	1.0	-	-	-
Tyres & Tubes	1.2	17.4	2.2	61.3	161.4	380.2	479.4	588.2
Hygenic Articles	-	-	-	-	-	3.3	9.3	1.7
Rubber Apparel & Clothing	-	10.0	43.2	87.7	137.1	150.4	202.4	326.6
Articles of rubber	3.1	34.0	60.1	92.1	151.9	203.1	250.2	255.1
Hard rubber	-	0.2	-	0.4	-	2.4	22.6	1.0
Footwear	0.1	21.0	6.6	9.8	13.4	18.9	20.5	270.7
Clothing	1.7	3.4	1.6	1.5	0.6	4.8	1.3	2.9
Total	18.4	109.2	117.6	253.7	465.7	764.0	985.7	1,446.3

Source: EDB

Table-22 OECD Import of Ceramic Products by Major Member Countries (1990)

(Unit: Million US$)

SITC Codes	OECD Total	Japan	USA	Canada	Australia	Germany	U.K.	France	Italy
662.44 ~45	3,502	37	445	101	118	701	223	694	84
662.44	292	8	-	17	10	35	15	64	22
662.45	3,210	29	445	84	108	666	208	630	62
666.1	2,643	127	859	124	75	241	105	193	243
666.11	1,349	103	301	62	34	104	47	97	199
666.12	115	1	40	6	1	2	10	2	22
666.13	1,179	23	518	57	40	135	48	94	22
666.2	1,381	81	460	31	22	178	119	97	58
666.21	651	35	289	21	10	43	67	24	42
666.29	730	46	171	10	12	135	52	73	16

Remark: Ceramic products are covered under the following codes of SITC (Rev. 3).

662.44	Unglased ceramic flags and paving, hearth or wall tiles; unglased mosaic cubes and the like, whether or not on a backing
662.45	Glased ....
666.1	Ceramic tableware, kitchenware and other ceramic household and toilet articles
666.11	Tableware and kitchenware of porcelain or china
666.12	Other household or toilet articles of porcelain or china
666.13	Ceramic tableware, kitchenware, other household and toilet articles (other than porcelain or china)
666.2	Statuettes and other ornamental ceramic articles
666.12	.... of porcelain or china
666.29	.... other

Source: OECD Foreign Trade Statistics (Series B)

Table-23 OECD Import of Ceramic Products by Product

1) Tableware, Kitchenware and Other Ceramic Household and Toilet Articles (SITC 666.1)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		2,100		2,335		2,643
Top Ten	Japan	376	Japan	403	Germany	429
Countries	Germany	367	Germany	358	U Kingdom	401
/Area	U Kingdom	321	U Kingdom	336	Japan	393
of Origin	Italy	127	Taiwan	175	China	183
	China	120	China	152	Italy	183
	Taiwan	116	France	103	Taiwan	163
	R Korea	102	Italy	101	France	129
	France	92	R Korea	101	R Korea	90
	Bel Lux	61	Portugal	74	Portugal	88
	Portugal	60	Bel Lux	60	Bel Lux	86
From Other Asian Countries						
Thailand		24		41		57
Philippines		7		14		16
Malaysia		2		8		12
Indonesia		1		6		9
Sri Lanka		5		6		8
India		1		1		2

2) Ceramic Statuettes and Other Ornamental Ceramic Articles (SITC 666.2)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		725		1,236		1,381
Top Ten	Taiwan	126	Taiwan	314	Taiwan	273
Countries	Italy	110	Italy	143	Italy	167
/Area	Portugal	72	China	91	China	130
of Origin	Germany	57	Germany	90	Portugal	122
	Japan	55	Portugal	86	Germany	112
	Netherlands	52	Japan	81	Spain	85
	China	49	Spain	76	Netherlands	69
	U Kingdom	29	U Kingdom	50	Japan	64
	Spain	28	Hong Kong	24	U Kingdom	57
	R korea	20	Malaysia	22	France	32
From Other Asian Countries/Area						
R Korea		20		26		18
Hong Kong		14		24		27
Thailand		7		19		28
Malaysia		4		22		24
Indonesia		-		5		6
Philippines		3		9		13
Sri Lanka		-		6		12
India		-		9		12

Source: OECD Foreign Trade Statistics (Series B)

Table-24 Japan's Import of Ceramic Products by Product

1) Tableware, Kitchenware and Other Ceramic Household and Toilet Articles (SITC 666.1)

(Unit: 1,000 US$)

	1988		1989		1990	
OECD Total		65,582		93,596		127,163
Top Ten Countries /Area of Origin	U Kingdom	26,069	U Kingdom	42,887	U Kingdom	61,419
	Denmark	6,997	Germany	9,131	Denmark	15,499
	Germany	6,624	Denmark	9,102	Germany	12,392
	France	5,130	France	7,321	France	10,279
	Italy	4,270	Italy	6,624	Italy	9,495
	R Korea	3,709	China	2,586	USA	2,830
	China	2,629	USA	2,532	E Germany	2,602
	E Germany	2,500	R Korea	2,288	R Korea	2,218
	Taiwan	1,113	Taiwan	1,119	China	1,675
	Thailand	1,060	Hungary	928	Thailand	1,246
From Other Asian Countries						
Malaysia		14		6		24
Indonesia		23		94		15
Philippines		515		396		332
Sri Lanka		590		788		241
India		10		18		21

2) Ceramic Statuettes and Other Ornamental Ceramic Articles (SITC 666.2)

(Unit: 1,000 US$)

	1988		1989		1990	
OECD Total		46,762		54,092		81,102
Top Ten Countries /Area of Origin	R Korea	10,294	Italy	11,767	Italy	16,298
	Italy	9,091	R Korea	8,795	Bel Lux	7,268
	Taiwan	4,957	Taiwan	5,349	U Kingdom	6,875
	China	4,200	China	4,696	R Korea	6,631
	U Kingdom	3,050	Germany	3,238	China	5,939
	Germany	2,762	U Kingdom	2,969	Taiwan	5,838
	USA	2,169	Denmark	2,573	USA	5,057
	Spain	1,871	Spain	2,438	Spain	4,925
	Denmark	1,811	France	2,305	Denmark	4,648
	France	1,792	USA	1,916	Germany	4,557
From Other Asian Countries/Area						
Hong Kong		736		1,534		956
Thailand		591		1,459		1,346
Malaysia		136		459		129
Indonesia		36		114		101
Philippines		258		355		449
Sri Lanka		3		38		154
India		39		83		97

Source: OECD Foreign Trade Statistics (Series B)

Table-25 OECD Import of Processed Food (Examples)

1) Crustaceans & Molluscs & Aquatic Invertebrates; Chilled/Frozen (SITC 036)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		7,940		10,535		11,067
Top Ten Countries /Area of Origin	Thailand	600	Thailand	916	Thailand	1,000
	USA	514	China	831	China	981
	N Korea	506	USA	586	USA	681
	China	479	Indonesia	562	Indonesia	650
	Indonesia	476	Canada	537	Canada	526
	India	360	India	404	India	484
	Greenland	315	Ecuador	401	Ecuador	437
	Taiwan	296	R Korea	393	R Korea	350
	Australia	263	Mexico	357	Greenland	337
	Morocco	248	Australia	345	Australia	313
From Major Asian Countries/Areas						
Thailand		600		916		1,000
Philippines		239		268		274
Malaysia		75		83		89
Indonesia		476		562		650
Singapore		18		52		54
Sri Lanka		18		17		17
India		360		404		484
China		479		831		981
R Korea		506		393		350
Taiwan		296		194		181
Hong Kong		36		41		39

Source: OECD Foreign Trade Statistics (Series B)

2) Fish, Crustaceans & Molluscs; Prepared/Preserved, N.E.S. (SITC 037)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		3,930		4,874		5,391
Top Ten Countries /Area of Origin	Thailand	437	Thailand	790	Thailand	862
	Taiwan	388	Taiwan	449	Denmark	446
	Denmark	343	Denmark	341	Taiwan	381
	R Korea	328	R Korea	336	R Korea	336
	USA	193	Canada	219	Netherlands	263
	Netherlands	179	Norway	217	Canada	251
	Germany	169	USA	202	Norway	229
	Norway	164	Netherlands	201	USA	217
	Canada	162	Germany	174	Germany	212
	USSR	120	Japan	136	Greenland	126
From Major Asian Countries/Areas						
Thailand		437		790		862
Philippines		55		112		101
Malaysia		57		85		79
Indonesia		26		58		82
Singapore		10		22		26
Sri Lanka		2		2		2
India		9		11		11
China		71		100		115
R Korea		328		336		336
Taiwan		388		449		381
Hong Kong		4		10		8

Source: OECD Foreign Trade Statistics (Series B)

3) Vegetables; Fresh, Chilled, Frozen/Simply Preserved (SITC 054)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		10,993		11,391		13,877
Top Ten Countries of Origin	Netherlands	2,168	Netherlands	2,169	Netherlands	2,665
	Spain	1,338	Spain	1,259	Spain	1,575
	France	940	France	917	France	1,255
	USA	846	USA	910	Mexico	1,109
	Thailand	832	Mexico	821	USA	945
	Italy	707	Thailand	739	Bel Lux	825
	Bel Lux	587	Italy	661	Italy	776
	Mexico	533	Bel Lux	629	Thailand	728
	China	423	China	406	China	398
	Germany	234	Canada	238	Germany	289
From Major Asian Countries/Areas						
Thailand		832		739		728
Philippines		7		5		5
Malaysia		0		0		0
Indonesia		132		105		121
Singapore		0		1		1
Sri Lanka		1		3		4
India		5		7		8
China		423		406		398
R Korea		56		66		62
Taiwan		182		203		203
Hong Kong		7		9		8

Source: OECD Foreign Trade Statistics (Series B)

4) Vegetables, Roots & Tubers; Prepared/Preserved, N.E.S. (SITC 056)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		4,201		5,208		6,076
Top Ten Countries /Area of Origin	Netherlands	709	Netherlands	797	Netherlands	1,084
	Italy	521	Italy	571	Italy	676
	China	395	China	499	Spain	511
	France	347	Spain	481	China	475
	USA	327	USA	359	France	456
	Bel Lux	252	France	355	USA	435
	Spain	238	Bel Lux	268	Bel Lux	340
	Taiwan	205	Taiwan	231	Germany	266
	Germany	195	Germany	224	Greece	227
	Greece	177	Greece	187	Taiwan	197
From Major Asian Countries/Areas						
Thailand		52		77		92
Philippines		1		1		2
Malaysia		1		2		2
Indonesia		1		14		29
Singapore		1		1		2
Sri Lanka		1		4		4
India		11		20		17
China		395		499		475
R Korea		26		34		34
Taiwan		205		231		197
Hong Kong		16		39		45

Source: OECD Foreign Trade Statistics (Series B)

5) Fruits & Nuts (Not Incl. Oil Nuts); Fresh/Dried (SITC 057)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		16,606		16,468		20,196
Top Ten Countries of Origin	USA	2,224	USA	2,265	Spain	2,452
	Spain	1,984	Spain	1,957	USA	2,341
	Italy	1,475	Italy	1,415	Italy	1,851
	Chile	825	France	845	Chile	1,096
	France	758	Chile	797	France	1,049
	Turkey	640	Costa Rica	588	Ecuador	847
	New Zealand	553	Ecuador	566	Turkey	732
	Ecuador	545	Turkey	555	Costa Rica	720
	Costa Rica	531	New Zealand	550	South Africa	646
	Philippines	526	Philippines	507	New Zealand	635
From Major Asian Countries/Areas						
Thailand		16		21		23
Philippines		526		507		448
Malaysia		17		15		17
Indonesia		7		5		7
Singapore		2		2		4
Sri Lanka		21		24		31
India		157		176		206
China		141		137		141
R Korea		10		10		9
Taiwan		75		65		39
Hong Kong		6		13		11

Source: OECD Foreign Trade Statistics (Series B)

6) Fruits; Prepared/Preserved (Excl. Fruits Juices) (SITC 058)

(Unit: Million US$)

	1988		1989		1990	
OECD Total		3,272		3,452		4,103
Top Ten Countries of Origin	Italy	281	Italy	268	Italy	349
	Thailand	229	Thailand	249	Thailand	289
	Greece	227	Spain	226	Greece	269
	Spain	215	Greece	221	Spain	258
	Netherlands	185	Germany	190	Germany	245
	Germany	179	Netherlands	181	Netherlands	237
	Philippines	171	Philippines	175	USA	193
	USA	152	USA	165	Philippines	159
	China	138	China	148	South Africa	150
	South Africa	136	South Africa	137	Turkey	147
From Major Asian Countries/Areas						
Thailand		729		249		289
Philippines		171		175		159
Malaysia		19		20		26
Indonesia		15		25		26
Singapore		7		10		10
Sri Lanka		1		1		1
India		10		28		18
China		138		148		130
R Korea		133		113		128
Taiwan		70		87		68
Hong Kong		11		15		16

Source: OECD Foreign Trade Statistics (Series B)

Table-26 Japan's Import of Processed Food by Major Countries of Origin

1) Crustaceans & Molluscs & Aquatic Invertebrates; Chilled/Frozen (SITC 036)

(Unit: Million US$)

	1988		1989		1990	
World Total		7,940		4,651		4,849
Top Ten Countries /Area of Origin	Thailand	600	Thailand	575	Thailand	611
	USA	514	China	467	Indonesia	505
	R Korea	506	Indonesia	456	China	498
	China	479	R Korea	366	USA	482
	Indonesia	476	USA	225	R Korea	317
	India	360	Australia	225	India	277
	Greenland	315	India	216	Philippines	210
	Taiwan	296	Philippines	189	Australia	193
	Australia	263	Mauritan	171	Morocco	184
	Morocco	248	Morocco	169	USSR	157
From Major Asian Countries/Areas						
Thailand		448		575		611
Philippines		234		189		210
Malaysia		62		47		43
Indonesia		436		456		505
Singapore		1		1		1
Sri Lanka		17		13		13
India		267		216		277
China		424		467		498
R Korea		488		366		317
Taiwan		265		144		147
Hong Kong		27		22		20

Source: OECD Foreign Trade Statistics (Series B)

2) Fish, Crustaceans & Molluscs; Prepared/Preserved, N.E.S. (SITC 037)

(Unit: 1,000 US$)

	1988		1989		1990	
World Total		961,550		951,028		915,955
Top Ten Countries /Area of Origin	Taiwan	371,406	Taiwan	379,804	Taiwan	339,894
	R Korea	246,872	R Korea	193,654	R Korea	192,230
	Thailand	72,163	Thailand	86,476	China	100,069
	China	60,416	China	78,663	Thailand	80,574
	USSR	54,012	Australia	46,365	USSR	45,419
	Australia	35,760	USSR	44,134	Australia	36,099
	Chile	22,140	Chile	24,818	Indonesia	13,624
	USA	16,819	DPR Korea	12,700	Canada	12,992
	Canada	12,558	USA	12,552	Chile	12,768
	DPR Korea	8,722	Canada	8,648	USA	11,945
From Major Asian Countries/Areas						
Thailand		72,163		86,476		80,574
Philippines		7,454		6,530		11,673
Malaysia		1,188		1,610		3,013
Indonesia		3,287		3,914		13,624
Singapore		3,413		4,752		4,103
Sri Lanka		-		15		18
India		203		236		358
China		60,416		78,663		100,069
R Korea		246,872		193,654		192,230
Taiwan		371,406		379,804		339,894
Hong Kong		640		2,004		1,254

Source: OECD Foreign Trade Statistics (Series B)

3) Vegetables; Fresh, Chilled, Frozen/Simply Preserved (SITC 054)

(Unit: 1,000 US$)

		1988		1989		1990
World Total		834,545		896,733		909,392
Top Ten Countries /Area of Origin	China	199,743	China	220,247	China	187,992
	Taiwan	158,271	Taiwan	173,369	Taiwan	179,766
	USA	141,934	USA	136,853	USA	141,483
	New Zealand	70,115	R Korea	65,342	New Zealand	78,034
	R Korea	54,614	New Zealand	58,990	Thailand	66,910
	Thailand	44,959	Thailand	58,176	R Korea	60,560
	Mexico	36,158	Mexico	40,432	DPR Korea	41,825
	Germany	27,717	DPR Korea	27,928	Mexico	33,635
	DPR Korea	18,104	Germany	26,472	Germany	26,224
	Canada	16,264	Czecho	17,718	Australia	16,217
From Major Asian Countries/Areas						
Thailand		44,959		58,176		66,910
Philippines		1,009		2,310		3,015
Malaysia		6		47		55
Indonesia		167		306		542
Singapore		37		31		5
Sri Lanka		23		99		270
India		860		752		949
China		199,743		220,247		187,992
R Korea		54,614		65,342		60,560
Taiwan		158,271		173,369		179,766
Hong Kong		1,4848		1,420		814

Source: OECD Foreign Trade Statistics (Series B)

4) Vegetables, Roots & Tubers; Prepared/Preserved, N.E.S. (SITC 056)

(Unit: 1,000 US$)

		1988		1989		1990
World Total		649,450		654,896		646,680
Top Ten Countries /Area of Origin	China	210,278	USA	197,296	USA	209,632
	USA	183,124	China	184,448	China	165,002
	Taiwan	133,013	Taiwan	125,825	Taiwan	113,292
	Canada	18,097	Canada	21,497	Turkey	31,938
	R Korea	17,270	R Korea	20,427	R Korea	18,695
	Turkey	17,231	Turkey	19,400	Thailand	17,043
	Thailand	15,012	Thailand	13,014	Canada	15,556
	Italy	11,769	Italy	11,224	Italy	14,408
	Portugal	7,713	Chile	10,426	Chile	10,088
	Chile	5,613	Germany	9,668	Portugal	6,959
From Major Asian Countries/Areas						
Thailand		15,012		13,014		17,043
Philippines		100		191		1,061
Malaysia		33		142		34
Indonesia		105		61		178
Singapore		341		337		345
Sri Lanka		-		-		2
India		646		1,236		810
China		210,278		184,448		165,002
R Korea		17,270		20,427		18,695
Taiwan		133,013		125,825		113,292
Hong Kong		2,709		1,208		1,746

Source: OECD Foreign Trade Statistics (Series B)

5) Fruits & Nuts (Not Incl. Oil Nuts); Fresh/Dried (SITC 057)

(Unit: Million US$)

	1988		1989		1990	
World Total		1,550		1,603		1,477
Top Ten Countries /Area of Origin	USA	709	USA	769	USA	672
	Philippines	419	Philippines	420	Philippines	379
	New Zealand	118	New Zealand	112	New Zealand	118
	China	94	China	83	China	93
	Taiwan	70	Taiwan	60	Ecuador	72
	Ecuador	36	Ecuador	51	Taiwan	34
	Iran	31	Iran	26	Iran	21
	India	22	Mexico	23	India	20
	Mexico	16	India	20	Mexico	20
	Australia	7	Australia	8	Chile	12
From Major Asian Countries/Areas						
Thailand		1		1		1
Philippines		419		420		379
Malaysia		0		-		1
Indonesia		1		1		2
Singapore		0		0		0
Sri Lanka		0		0		0
India		22		20		20
China		94		83		93
R Korea		6		6		6
Taiwan		70		60		34
Hong Kong		0		0		0

Source: OECD Foreign Trade Statistics (Series B)

6) Fruits; Prepared/Preserved (Excl. Fruits Juices) (SITC 058)

(Unit: 1,000 US$)

		1988		1989		1990
World Total		453,627		490,918		482,775
Top Ten Countries /Area of Origin	R Korea	115,977	China	109,449	R Korea	118,613
	China	90,610	R Korea	101,271	China	87,613
	USA	61,072	Taiwan	75,980	USA	68,093
	Taiwan	55,357	USA	63,774	Taiwan	56,763
	South Africa	21,585	Thailand	20,367	Thailand	30,523
	Thailand	18,110	South Africa	19,210	South Africa	18,627
	Philippines	14,901	Philippines	14,430	Philippines	14,626
	Australia	11,660	Greece	14,091	France	12,216
	Greece	9,094	Australia	12,206	Australia	11,830
	Italy	8,249	France	8,930	Malaysia	11,716
From Major Asian Countries/Areas						
Thailand		18,110		20,367		30,523
Philippines		14,901		14,430		14,626
Malaysia		3,662		4,520		11,716
Indonesia		230		890		1,256
Singapore		701		369		257
Sri Lanka		22		28		79
India		38		160		104
China		90,610		109,449		87,613
R Korea		115,977		101,271		113,613
Taiwan		55,357		75,980		56,763
Hong Kong		4,349		5,381		3,331

Source: OECD Foreign Trade Statistics (Series B)

Table-27 Japan's Import of Processed Food (Examples)

(1) Tea

	Value (1,000 US$)			Quantity (Ton)		
	1989	1990	1991	1989	1990	1991
Total	57,625	70,077	61,643	13,516	14,102	13,345
Retail packing:	17,215	21,937	22,160	1,107	1,030	1,034
UK	4,568	7,652	8,909	238	372	385
France	3,370	3,333	4,725	113	99	132
Sri Lanka	3,429	5,049	4,274	220	237	191
Others:	40,410	48,140	39,483	12,409	13,072	12,311
Sri Lanka	13,898	16,008	14,055	5,036	5,195	5,227
India	12,449	14,959	9,292	2,977	3,058	2,070
UK	5,355	7,015	6,045	824	886	742

(2) Canned Pineapples

	Value (1,000 US$)			Quantity (Ton)		
	1989	1990	1991	1989	1990	1991
Total: Canned Fruits	124,922	134,969	174,739	117,093	131,517	159,681
Canned Pineapples	25,851	47,718	64,732	24,941	53,283	66,527
Thailand	8,934	22,344	28,694	9,680	26,612	30,984
Philippines	9,189	10,501	15,476	7,853	10,687	14,566
Malaysia	4,229	11,257	14,415	4,232	12,472	15,038
Others	3,499	3,616	6,147	3,176	3,512	5,938

(3) Edible Nuts

	Value (1,000 US$)			Quantity (Ton)		
	1989	1990	1991	1989	1990	1991
Total: Edible Nuts	233,471	231,972	259,564	72,163	68,347	74,966
Chestnuts	63,506	69,659	69,698	30,226	29,495	28,013
China	56,774	63,666	63,271	28,255	28,271	26,825
Korea	5,610	5,493	6,002	1,400	1,065	1,049
Armonds	83,331	79,682	75,219	23,119	20,519	22,934
USA	83,301	79,517	75,090	23,112	20,483	22,904
Cashewnuts	20,910	21,811	32,492	3,794	4,298	5,530
India	20,251	20,240	30,375	3,660	3,980	5,151
Pistachio	33,088	26,415	40,649	6,487	5,391	9,489
Iran	26,063	21,019	31,501	5,235	4,478	7,709

(4) Canned Vegetables

	Value (1,000 US$)			Quantity (Ton)		
	1989	1990	1991	1989	1990	1991
Total: Canned Vagetables	187,099	164,077	205,574	141,477	129,139	151,903
Canned Asparagus	9,163	12,753	12,209	3,696	5,394	4,735
China	6,476	11,910	11,354	2,933	5,110	4,455
Canned Bamboo Shoot	70,867	73,446	110,941	65,902	68,936	86,569
China	49,341	46,014	76,618	44,177	42,355	59,986
Taiwan	15,491	17,621	14,433	13,443	14,709	9,473
Thailand	9,666	19,472	5,982	8,221	11,744	16,823
Canned French Mashroom	32,090	9,843	13,814	17,448	5,564	9,166
China	27,714	7,797	12,419	15,600	4,690	8,484
Canned Other Mashroom	11,333	9,819	12,912	4,911	4,728	6,059
China	5,401	4,651	6,494	2,760	2,803	3,533
Canned Sweet Corn	50,534	47,509	43,839	40,953	36,905	36,287
USA	48,235	45,108	41,311	39,396	35,915	34,903

Source: Ministry of Finance

Table-28 Sri Lanka's Export of Bristle Fibre Products

(Unit: 1,000 Rs)

(1) Bristle fibre twisted

	1988		1989		1990		1991	
Total		84,381		74,902		8,215		1,912
Top five destinations	Germany	14,068	Germany	18,774	Germany	2,477	Germany	1,051
	U Kingdom	13,431	U Kingdom	8,600	Japan	1,959	Japan	223
	Yugoslavia	11,371	Yugoslavia	7,830	USSR	806	Belgium	170
	USSR	11,199	Japan	7,160	U Kingdom	714	Italy	158
	Japan	9,538	USA	5,688	USA	538	Morocco	116

Remarks: 1990, 1991 HS. No. 53051101
1988, 1989 CCCN No. 540483

(2) Bristle fibre not twisted

	1988		1989		1990		1991	
Total		150,315		222,903		116,818		66,064
Top five destinations	Japan	38,698	Japan	46,905	Germany	25,941	Japan	17,422
	R Korea	18,559	Germany	32,792	Japan	23,839	Germany	12,587
	Germany	16,117	France	23,903	France	14,631	U Kingdom	7,039
	France	15,202	R Korea	18,318	U Kingdom	6,375	France	5,524
	U Kingdom	12,807	U Kingdom	17,691	Belgium	6,357	R Korea	3,444

Remarks: 1990, 1991 HS. No. 53051102
1988, 1989 CCCN No. 570482

(3) Bristle fibre, Other

	bristle fibre bleached, dyed				bristle fibre bleached			
	1988		1989		1990		1991	
Total		19,150		11,553		194,826		22,114
Top five destinations	Japan	5,720	Japan	4,457	U Kingdom	42,918	Japan	6,009
	Germany	2,750	U Kingdom	1,756	USA	31,374	France	2,745
	South Africa	2,291	Malaysia	689	Germany	22,408	Thailand	1,717
	France	1,156	South Africa	579	Yugoslavia	19,280	U Kingdom	1,597
	R Korea	1,038	Canada	552	Japan	11,438	Germany	1,291

bristle fibre dyed

	1990		1991	
		4,515		8,846
	U Kingdom	1,145	South Africa	1,955
	Japan	1,038	U Kingdom	1,554
	Thailand	590	Thailand	1,057
	France	337	Japan	701
	South Africa	336	Australia	626

Remarks: 1990, 1991 HS. No. 53051103 for bristle fibre bleached
HS. No. 53051104 for bristle fibre dyed
1988, 1989 CCCN No. 570481

Products covered by CCCN No. and corresponding HS. No. are almost same, but do not perfectly conform.

Source: External Trade Statistics Sri Lanka

Table-29 Sri lanka's Export of Brooms and Brushes Consisting of Twigs

(Unit: 1,000 Rs)

	1988		1989		1990		1991	
Total		249,895		295,143		235,039		282,925
Top five destinations	Japan	107,824	Japan	137,803	Japan	119,627	Japan	142,929
	U Kingdom	57,727	U Kingdom	60,886	U Kingdom	52,013	U Kingdom	51,488
	USA	40,144	USA	35,580	Belgium	13,958	Germany	14,683
	Belgium	9,854	Germany	13,673	Germany	10,887	Belgium	14,973
	France	9,239	Australia	6,976	Taiwan	6,799	Taiwan	11,315

Remarks: HS. No. 960310
CCCN No. 9601
There is difference among items covered under these two classifications.
Source: External Trade Statistics Sri Lanka

Table-30 Japan's Import of Coconut Fibres

(Unit: ¥1,000)

Coconut fibre, raw
(HS 5305, 11-000)

	1988		1989		1990		1991	
Total		261,607		309,413		214,078		178,600
Major	Sri Lanka	257,033	Sri Lanka	300,797	Sri Lanka	211,631	Sri Lanka	173,672
Countries/	Thailand	2,620	Philippines	6,486	Thailand	1,460	India	1,574
Area of	Singapore	1,091	Thailand	2,130	Philippines	987	Indonesia	1,071
Origin	Philippines	863					Thailand	484

Coconut fibre, not raw, tow and waste of these fibres
(HS 5305, 19-000)

	1988		1989		1990		1991	
Total		134,022		208,068		154,318		138,651
Major	Sri Lanka	114,559	Sri Lanaka	170,864	Sri Lanka	118,133	Sri Lanka	93,431
Countries/	Philippines	12,737	Philippines	25,006	Philippines	20,976	Philippines	37,498
Area of	Thailand	6,511	Thailand	12,198	Thailand	6,918	Thailand	5,538
Origin	India	215			Singapore	6,481	Taiwan	1,580
					Taiwan	762	Singapore	559

Source: Japan Exports and Imports

Table-31 Japan's Import of Brushes

(Unit: ¥1,000)

Brooms and brushes, consisting of twigs or other vegetable materials bound together (HS 960310000)

	1988		1989		1990		1991	
Total		508,580		648,020		877,500		949,465
Major Countries/ Area of Origin	China	327,753	China	477,895	China	503,990	China	534,718
	Thailand	80,857	Thailand	57,957	Taiwan	202,066	Taiwan	217,564
	Taiwan	63,865	Taiwan	57,804	Thailand	77,310	Thailand	101,447
	Sri Lanka	15,653	Indonesia	40,864	Indonesia	68,912	Indonesia	57,198
	Indonesia	13,552	Sri Lanka	5,228	Sri Lanka	16,494	Sri Lanka	24,507

Brooms, brushes, mops and squeeges, n.e.s.

	1988		1989		1990		1991	
Total		2,152,947		2,437,234		2,388,150		2,678,871
Major Countries/ Area of Origin	Taiwan	1,023,518	Taiwan	918,356	Taiwan	656,230	Taiwan	830,422
	Sri Lanka	402,907	Sri Lanka	512,379	Sri Lanka	518,788	Sri Lanka	516,898
	Thailand	181,641	Thailand	291,573	Thailand	404,114	Thailand	452,502
	USA	124,391	Germany	138,717	Germany	160,720	USA	215,496
	Germany	107,528	USA	149,911	USA	182,124	Germany	166,572

Source: Japan Exports and Imports

Table-32 State of Utilisation and Evaluation of Export Promotion Measures

	Garments and apparel (100 companies, of which 91 exporting)		Rubber-based products (50 companies, of which 22 exporting)		Gems and jewellery (59 companies, of which 30 exporting)		Total	
	Utilisation	Evaluation as useful	Utilisation	Evaluation as useful	Utilisation	Evaluation as useful	Utilisation	Evaluation as useful
1) Import Duty Consessions								
(1) Import Duty Rebates (Duty Rebate Scheme)	74	68	12	11	7	18	93	97
(2) Manufacture in Bond (Manufacture in Bond Scheme)	77	69	2	7	8	14	87	90
(3) Duty Concessions on Machinery Imports	78	71	11	10	7	19	96	100
(4) GCEC Duty Concessions (special incentives to attract foreign investors)	9	23	2	6	1	9	12	38
2) Tax Incentives								
(1) Income Tax Concessions	79	71	10	10	30	28	119	109
(2) Business Turnover Tax (BTT) Concessions	66	65	9	9	29	27	104	101
(3) Investment Relief (Tax Relief for Investments)	44	48	6	5	5	13	55	66
(4) Exemptions of Dividends in the Hand of Shareholders	35	47	5	5	7	10	47	62
3) Financial Assistance Schemes								
(1) Short-term Pre-shipment (Packing) Credit Scheme	63	61	11	9	7	14	81	84
(2) Medium and Long Term Credit Scheme	43	50	14	9	11	16	68	75
(3) Concessionary Financing Schemes Operated by the EDB								
1. Financial Assistance to Manufacturing and Processing Exporters to Expand Exports in the Short Term	9	28	4	3	2	8	15	39
2. Financial Assistance to Small Scale Export Oriented Manufactures and Processors	6	25	3	5	2	7	11	37
3. Equity Participation	3	20	3	5	0	5	6	30
4. Incentive Scheme for Pioneering Export Projects	6	28	5	4	0	5	11	37
4) Export Credit Insurance and Guarantees								
(1) Pre-shipment Credit Guarantees	35	40	4	6	7	10	46	56
(2) Post-shipment Credit Guarantees	9	24	1	4	7	12	17	40
(3) Export Performance Guarantees	11	28	3	2	1	9	15	39
(4) Export Payment Insurance	7	21	2	1	1	7	10	29
5) Export Development Investment Support Scheme (EDISS)	35	45	9	7	14	18	58	70
6) Market Development Support by the EDB (subsidizing the cost of a range of development/promotion activities such as foreign sales missions, participation in foreign trade fairs, and market surveys)	13	42	6	7	19	18	38	67
7) Product Development Support by the EDB	11	29	4	5	11	15	26	49
8) Export Production Village (EPV) Scheme	0	16	1	3	1	5	2	24
9) Information Service on Foreign Market by the EDB	19	37	6	5	18	18	43	60

Remark (1) Medium and Long Term Credit Scheme was phased out at the beginning of 1992.
(2) EDISS was been phased out on December 31, 1991.

Table-33 Number of Foreign Investment Promotion Organisations in Japan

As at the end of August 1992

North America	USA	44
	Canada	4
Europe	Germany	15
	France	13
	UK	12
	Spain	7
	Others	13
Oceania	Australia	7
Asia	China	4
	Rep. of Korea	2
	Hong Kong	1
	Thailand	1
	Singapore	1
	Malaysia	1
	India	1
Others		3
Total		130

Remark: Foreign investment promotion offices include representative offices in Japan of overseas investment promotion organisations, governmental organisation and chambers of commerce who are doing promotional activities for the invitation of Japanese companies. Embassies are not included.

Source: JETRO

Table-34 BOI Investment Projects in Commercial Operation by Major Countries/Areas

(As at 31st August 1992)

COUNTRY/AREA	NO. OF PROJECT	INVESTMENT (1,000 Rs) FOREIGN	LOCAL	TOTAL
Germany	6	381,435	0	381,435
Germany-Sri Lanka	3	295,017	2,491	297,508
Hong Kong	12	239,288	17,782	257,070
Hong Kong-Japan	1	5,960	1,600	7,560
Hong Kong-Korea-Sri Lanka	1	1,500	19,500	21,000
Hong Kong-Norway-Sri Lanka	1	36,108	0	36,108
Hong Kong-Sri Lanka	8	814,355	1,007,850	1,822,205
Hong Kong-UK-Sri Lanka	2	16,568	31,377	47,945
Hong Kong-USA-Sri Lanka	1	*	*	*
India-Sri Lanka	3	431,037	6,015	437,052
Japan	9	368,342	0	368,342
Japan-Singapore-Sri Lanka	1	54,831	1,200	56,031
Japan-Sri Lanka	6	85,541	16,744	102,285
Japan-Taiwan	1	24,141	0	24,141
Korea	24	1,810,295	24,387	1,834,682
Korea-Hong Kong	1	13,843	7	12,850
Korea-Sri Lanka	7	245,392	176,477	421,869
Netherlands	5	17,310	0	17,310
Netherlands-Germany-Sri Lanka	2	98,408	1,875	100,283
Netherlands-India-C. Island-Sri Lanka	1	23,758	1,118	24,876
Netherlands-Sri Lanka	2	24,157	33,033	57,190
Norway	1	53,186	0	53,186
Norway-Sri Lanka	1	250	250	500
Singapore	3	1,297,966	0	1,297,966
Singapore-Hong Kong	1	*	*	*
Sri Lanka	13	2,098,387	8,563,718	10,662,105
Switzerland	3	131,265	0	131,265
Switzerland-Hong Kong-Sri Lanka	1	145,171	214,829	360,000
Switzerland-Italy-Sri Lanka	1	37,254	166	37,420
Switzerland-Sri Lanka	3	29,456	31,175	60,631
Taiwan	3	88,732	0	88,732
Taiwan-Hong Kong	1	7,500	2,500	10,000
Taiwan-Sri Lanka	1	17,766	0	17,766
UK	2	19,379	5,000	24,379
UK-Germany	1	4,117	0	4,117
UK-Hong Kong-Germany-Sri Lanka	1	189	9,811	10,000
UK-Norway-Sri Lanka	1	11,323	2,728	14,051
UK-Sri Lanka	6	129,561	92,060	221,621
USA	1	*	*	*
USA-Germany	1	10,641	3,000	13,641
USA-Hong Kong	1	76,024	0	76,024
USA-India	1	4,100	8,788	12,888
USA-Sri Lanka	3	92,173	7,000	99,173
USSR-Sri Lanka	1	3,854	0	3,854
TOTAL	179	12,009,640	10,463,073	22,472,713

Remark: * Not Available
Source: Board of Investment of Sri Lanka

Table-35 BOI Investment Projects in Commercial Operation by Products

(As at 31st August 1992)

PRODUCT CATEGORY	NO. OF PROJECT	INVESTMENT (1,000 Rs)		
		FOREIGN	LOCAL	TOTAL
1. Food Products	2	13,820	0	13,820
2. Beverages & Tobacco	2	23,393	0	23,393
3. Rubber Products	9	2,817,627	10,523	2,828,150
4. Wood Products (Including Furniture)	1	3,000	0	3,000
5. Textiles	9	1,570,863	4,200	1,575,063
6. Non-Metallic Mineral Products	10	234,822	258,940	523,762
7. Coir Products	2	5,500	5,100	10,600
8. Jewellery and Lapidary	14	277,587	262,720	540,307
9. Electronics & Electrical Goods	12	488,842	16,954	505,796
10. Fabricated Metal Products	9	1,349,540	35,411	1,384,951
11. Transport Equipment/ Other Machinery	2	35,710	1,724	37,434
12. Wearing Apparel	54	1,478,144	293,811	1,771,955
13. Footwear	4	154,020	90,534	244,554
14. Leather Products/ Leather Garments	6	67,280	0	67,280
15. PVC Products	9	193,269	16,632	209,901
16. Horticulture	6	66,089	550	66,639
17. Services	6	2,642,673	9,339,394	11,982,067
18. Fishing Gear & Accessories	3	65,081	1,450	66,531
19. Cosmetics & Artist's Brushes	2	64,898	3,856	68,754
20. Printing	2	78,108	46,000	124,108
21. Other	15	349,374	75,274	424,648
TOTAL	179	12,009,640	10,463,073	22,472,713

Source: Board of Investment of Sri Lanka

Table-36 BOI Investment Projects Where Agreements are in Force by Asian NIEs and Japan

(As at 30th June 1992)

	All Industries	Garments & Apparel	Gems & Jewellery	Rubber-based Products
Rep. of Korea	49	10	1	7
Hong Kong	40	11	1	0
Japan	28	3	2	1
Singapore	9	0	0	0
Taiwan	8	2	0	0
(Sub-total)	(134)	(26)	(4)	(8)
Others	123	34	10	5
Total	257	60	14	13

Remark: Others include investment projects of other foreign companies (100% foreign and JVs) and local companies (100% local).
Source: BOI

Table-37 Foreign Direct Investment from Japan

(Unit: Millions of US$,%)

Fiscal Year	1989/90		1990/91		1991/92		Cumulative Total (1951/52 - 1991/92)		
Country / Area	No. of Cases	Value	No. of Cases	Value	No. of Cases	Value	No. of Cases	Value	Share
Indonesia	140	631	155	1,105	148	1,193	2,021	12,733	3.6
Hong Kong	335	1,898	244	1,785	178	925	3,921	10,775	3.1
Singapore	181	1,902	139	840	103	613	2,662	7,168	2.0
Thailand	403	1,276	377	1,154	258	807	2,723	5,229	1.5
Rep. of Korea	81	606	54	284	48	260	1,895	4,398	1.2
Malaysia	159	673	169	725	136	880	1,645	4,111	1.2
China	126	438	165	349	246	579	1,105	3,402	1.0
Taiwan	165	494	102	446	87	405	2,487	3,135	0.9
Philippine	87	202	58	258	42	203	892	1,783	0.5
India	9	18	7	30	9	14	176	210	0.1
Pakistan	5	83	3	9	2	14	60	124	0.0
Brunei	-	0	-	-	1	0	32	109	0.0
Sri Lanka	5	1	9	4	7	4	126	102	0.0
Others	11	16	17	64	12	39	166	175	0.0
Asia Total	1,707	8,238	1,499	7,054	1,277	5,936	19,911	53,455	15.2
USA	2,668	32,540	2,269	26,128	1,607	18,026	24,551	148,554	42.2
North America Total	2,848	33,902	2,426	27,192	1,714	18,823	25,939	155,008	44.0
Europe Total	916	14,808	956	14,294	803	9,371	8,228	68,636	19.5
Middle and Near East Total	5	66	1	27	10	90	350	3,522	1.0
Africa Total	88	671	70	551	76	748	1,534	6,574	1.9
Central and South America Total	421	5,238	339	3,628	290	3,337	7,487	43,821	12.4
Oceania Total	604	4,618	572	4,166	394	3,278	4,351	21,376	6.1
Grand Total	6,589	67,540	5,863	56,911	4,564	41,581	67,800	352,392	100.0

Remarks: 1. Projects notified basis.
2. Respective countries and areas in Asia are those whose values in cumlative total are exceeding 100 million US dollars.

Source: Ministry of Finance, Japan

Table-38 Sales Outlets of Japanese Manufacturing Affiliates in Asia

(Unit: %)

	FY 1983/84	FY 1991/92
Sales to local markets	66.9	59.6
Export sales	33.1	40.4
to Japan	10.8	11.8
to North America	8.2	7.6
to Asia	8.2	12.6
to Europe	3.1	6.1
Total sales	100.0	100.0

Remarks: 1. A total of 1,755 Japanese manufacturing affiliates was covered for FY 1991/92.

2. The export value to Japan by Japanes manufacturing affiliates was estimated around 6 billion US dollars, representing some 18% of the total manufactured imports from Asia for FY 1991/92.

Source: Ministry of International Trade and Inudstry, Japan

Table-39 Foreign Direct Investment to Thailand

Top 10 Countries / Areas (Unit: Millions of Baht)

Year	1990		1991	
Country/Area	No. of Cases	Value	No. of Cases	Value
Japan	180	69,230.7	142	44,908.3
USA	72	27,913.1	51	28,849.1
UK	36	9,888.3	22	22,647.1
Singapore	34	15,115.2	32	15,902.1
Taiwan	144	19,567.2	69	14,586.6
Hong Kong	66	27,411.9	38	8,677.0
Netherland	10	3,943.1	11	6,529.0
Malaysia	13	2,566.5	11	3,937.7
Italy	10	626.4	3	3,715.0
France	13	4,942.9	14	3,179.2
Total	617	361,470.0	390	127,279.5

Remarks: 1. Applications approved basis

2. Projects from more than two countries are doubly counted

Source: Board of Investment, Thailand (BOT)

Table-40 Foreign Direct Investment to Malaysia

(Unit: 1,000 M$)

Year	1990		1991	
Country/Area	No. of Cases	Value	No. of Cases	Value
Taiwan	270	6,339,128	182	3,548,374
Japan	134	4,212,582	120	3,357,666
USA	29	567,306	33	1,724,302
Rep. of Korea	25	650,436	41	1,468,893
Indonesia	12	1,083,267	6	1,234,270
Singapore	147	895,315	108	1,024,850
Hong Kong	43	374,966	50	600,629
UK	13	867,169	14	534,368
Australia	17	54,299	19	410,516
China	3	9,710	4	399,535
Denmark	5	22,756	5	179,080
Others	137	3,506,136	117	2,997,273
Total	*	17,629,136	*	15,956,257

Remarks: 1. Only manufacturing projects granted approval

2. * No. of cases not totaled to avoid double counting

Source: Malaysian Industrial Development Authority (MIDA)

Table-41 Foreign Direct Investment to Indonesia

(Unit: Millions of US$)

Year	1990		1991		1967-1991 Cumulative Total	
Country/Area	No. of cases	Value	No. of Cases	Value	No. of Cases	Value
Japan	76	2,241	82	929	472	11,405
Hong Kong	36	993	26	278	203	4,213
Taiwan	94	618	57	1,056	227	3,375
USA	16	154	8	276	133	2,496
Rep. of Korea	86	723	54	301	253	2,229
Netherlands	10	567	9	184	89	2,131
Germany	4	13	4	60	51	1,822
Singapore	34	264	45	346	151	1,579
UK	10	58	15	536	104	1,415
Austiralia	8	187	8	48	116	962
Int'l JVs	22	2,296	33	4,141	144	13,452
Total	432	8,750	376	8,778	2,171	48,351

Remarks: 1. Projects approved basis.
2. Excluding petroleum and finance.
3. Expansion is excluded in No. of cases, but included in value.

Source: Investment Coodinating Board, Indonesia (BKPM)

Table-42 Interest in Joint Ventures and Technical Tie-ups with Foreign Companies

	[Garments and apparel]	[Gems and jewellery]	[Rubber-based products]
Joint ventures:			
Interested	58	28	40
Not interested	27	28	8
Not known	15	3	2
Technical tieups:			
Interested	47	28	36
Not interested	22	5	7
Not known	31	26	7
Desirable Partners for Joint ventures:			
Japan	39	24	23
Asian NIEs	16	8	14
ASEAN	7	3	5
U.S.	29	15	7
EC	20	11	11
India	1	1	8
Others	3	4	4
Desirable Partners for Technical tieups:			
Japan	35	23	22
Asian NIEs	18	5	12
ASEAN	2	1	4
U.S.	19	14	8
EC	18	12	7
India	2	2	5
Others	0	2	2
Matters Expecting Foreign Companies:			
Capital	31	16	28
Technology	35	15	29
Marketing	39	24	22
Quality improvement	20	8	9
Product development	19	8	14
No. of responding companies	52	29	40
No. of companies responding	100	59	50

Remark: Multiple Responses
Source: Questionnaire survey

Table-43 Evaluation of Sri Lankan Investment Environment by Japanese Companies

	No. of Response	%
1. Merits when considering Sri Lanka as investment site:		
Labour costs	85	47
Securing of base for export production	35	20
Procurement of raw materials	17	9
Labour force	17	9
Securing of domestic market	12	7
Others	19	11
No response	54	30
2. Problems when considering Sri Lanka as investment site:		
Shortage of electric power, telecommunications, roads, and other infrastructure	78	44
Undeveloped state of related industries	77	43
Political and social situation	65	36
Shortage of engineers and skilled workers	58	32
Difficulties in obtaining good quality raw materials domestically and high costs of importing raw materials	52	29
Shortage of development of related facilities and systems, such as public testing and research institutes, export inspection offices, standards, etc.	24	13
Others	23	13
No response	33	18
3. Knowledge of investment incentives:		
Did not know about them	146	82
Knew about them	25	15
No response	6	3
4. Reasons for lack of interest in investment in Sri Lanka		
Insufficient information on investment environment in Sri Lanka	63	35
Political and social situation in Sri Lanka	53	30
Not considering overseas investment	22	12
Others	45	25
No response	28	16
Total	179	100

Source: Questionnaire survey

Table-44 Motivation for Investment of Japanese Companies in Sri Lanka

A. Motivation for Investment:		
1. Securing labour		8
2. Supply of products to third countries		6
3. Expansion of sales channels in local market		5
4. Requests of Japanese-affiliated customers		3
5. Dealing with yen appreciation		2
6. Securing raw materials and parts		0
B. Reasons for Selection of Sri Lanka:		
1. Labour force (quality, education, religion, training)/labour costs		11
2. Export processing zones		7
3. Foreign investment incentives		6
4. Import duties on parts and materials and import policies		4
5. Previous business relations with Sri Lanka		4
6. Export promotion measures		1
7. Geographical conditions of Sri Lanka		0
C. Problems in Management:		
1. Political instability		8
2. Infrastructure		7
3. Quality control		5
4. Labour problems (difficulties in employment, job hopping, union problems, etc.)		4
5. Competition with imports		4
6. Demands from local investors for high dividends		4
D. Evaluation of Workers and Middle Management:		
Workers -		
	Satisfied	7
	Fair	8
	Dissatisfied	0
Middle management -		
	Satisfied	3
	Fair	7
	Dissatisfied	5
Number of companies responding		16

Remark: Multiple responces for the item A to C.
Source: Questionnaire survey to Japanese Manufacturing Companies in Sri Lanka

Table-45 Use and Evaluation of Investment Incentives and Individual Systems

Name of system		Used/Not used		Evaluation in case of use	
1.	Tax holiday (maximum 15 years)	Used Not used	12 4	Satisfied Fair Dissatisfied	3 9 0
2.	Concessionary rate of corporate income tax (2 to 5% concessionary rate after tax holiday)	Used Not used	3 6	Satisfied Fair Dissatisfied	1 2 0
3.	Exemption from dividend tax for foreign shareholders (nonresidents) (no time limit)	Used Not used	8 6	Satisfied Fair Dissatisfied	2 5
4.	Exemption from dividend tax for resident shareholders (period of tax holiday plus one year)	Used Not used	3 9	Satisfied Fair Dissatisfied	1 1 0
5.	Exemption from income tax on royalties paid to non-residents (full exemption during period of tax holiday)	Used Not used	1 8	Satisfied Fair Dissatisfied	0 1 0
6.	Exemption from income tax on emoluments paid to foreign employees (during period of tax holiday)	Used Not used	9 6	Satisfied Fair Dissatisfied	5 3 1
7.	Duty-free imports of plant, equipment, raw materials, etc. (no time limit)	Used Not used	11 5	Satisfied Fair Dissatisfied	6 4 0
8.	Exemption from export tax for export of final products (no time limit)	Used Not used	11 3	Satisfied Fair Dissatisfied	6 4 0
9.	Exemption from Import and Export Control Act (no time limit)	Used Not used	5 4	Satisfied Fair Dissatisfied	3 2 0
10.	Exemption from Exchange Control Act and authorisation to open a Foreign Currency Banking Unit (FCBU) Account (no time limit)	Used Not used	7 7	Satisfied Fair Dissatisfied	5 2 0

11.	Exemption from payment of tax on transfer of shares to foreigners (no time limit)	Used Not used	3 7	Satisfied Fair Dissatisfied	1 1 0
12.	Exemption from income tax on capital gains arising from transfer of shares (no time limit)	Used Not used	2 6	Satisfied Fair Dissatisfied	1 0 0
	Number of companies responding		16		

Source: Questionnaire Survey

Table-46 List of Testing, Metrology and Calibration Equipment Required for SLSI

A. MATERIAL TESTING LABORATORY

- Corrosion testing apparatus (Salt spraty tester)
- NDT Equipment
- Paper/Packaging material test equipment
- Paint testing equipment
- Plastic/Rubber testing equipment
- Metallographic equipment
- Measuring microscope
- Set of equipment required for viscosity measurement
- Coating thickness measuring equipment
- Reference hardness blocks
- Specific gravity measuring equipment
- Barometer
- Distill Water plant
- Air-conditioned vehicle for mobile NDT purposes

B. ELECTRICAL AND ELECTRONIC LABORATORY

- Continuously variable AC power supply
- Equipment to test 13A plugs and socket outlets (including gauges)
- Tracking test apparatus
- Glow wire test apparatus
- Climatic chamber
- Radio frequency interference measuring equipment
- Spray test apparatus
- Splash test apparatus
- Vertical rain test apparatus
- Needle flame test apparatus
- Hot mandrel test apparatus
- DC power supply constant voltage/constant current 0-20 V, 0-200 A
- Inductive load for switch testing
- Resistive load
- 2 nos. of chart recorders
- Integrating photometer and standard lamps for testing fluorescent lamps

C. FOOD AND CHEMICALS LABORATORY

- Atomic absorption spectrophotometer with the background corrector and graphite furnance
- IR spectrophotometer
- Plasma spectrophotometer
- Total reflection X-ray fluorescence spectrophotometer
- Carbon/Sulphur Analyzer
- Polarograph
- Microwave oven
- Standard reference materials

D. MICROBIOLOGY LABORATORY

- Horizontal lamina flow cabinet
- Colony counter
- Binocular microscope
- Top loading autoclave - 70 l
- Bench centrifuge complete with heads, adoptors, 15, 50 & 100 ml containers
- pH meter
- Stainless steel blender with 50-250 ml container, 1000 ml container and lids
- Pipette plugging blender, cotton roving for 2 ml and 10 ml pipettes and pump
- Bench top pipette deplugging unit
- Air sampler
- Laboratory glassware washing machine
- Safety equipment

E. TEXTILE LABORATORY

- Bundesmand Water repellancy tester
- Yarn evenness tester complete with imperfection indicator, chart recorder/printer
- Microprocessor controlled colour matching/measuring system
- Weatherometer
- Flammability tester (horizontal)
- Flammability tester (vertical)
- Flammability tester (45 degrees)
- Flammability tester (hot nut)
- Seam slippage tester
- Elemendorf tear resistance tester (two units covering all ranges)
- Air permeability tester
- Zip tester
- Precision microtome
- Drape tester
- X-type viscometer
- Pilot knitting machine
- Trash analyzer
- Fibrograph
- Standard reference material

F. METROLOGY/CALIBRATION LAVORATORY

Dimensional Metrology

- Set of gauge blocks
- Vertical comparator (Mechanical contact type)
- Tool makers microscope
- Comparator for internal and external measurements
- Autocollimator
- 3 D Coordinate measuring machine
- Gear measuring machine
- Precision polygons
- Reference rings
- Laser interferometer
- Screw thread measuring machine
- Precision bench centre
- Automatic gauge block calibrating system
- Thread pitch measuring set up

Mass

- Mass comparator (0-100 kg)
- Slotted weight OIML-Class F1 1 kg - 100 kg

Pressure, Force

- Direct indicating standards test gauges (Pressure)
- Set of proving rings
- Load cell systems to cover the range 100 kg - 250 MT (both tension and compression)
- Pressure gauge calibration - Dynamic pressure

Temparature

- Deep freezer for storage of precision thermo.
- PRT 100 (02 nos.)
- Portable calibration baths (above room temperature) 50 - 1,200 degrees centigrade

Volume, Flow, Hydrometry & Viscometry

- Reference viscometers
- Reference capillary viscometers for measurement of kinematic viscosity
- Glass capillary reference viscometers
- Volume calibration test equipment
- Liquid flow-meter calibration tester
- Analytical balance
- Reference hydrometer set
- General purpose reference hydrometer set
- Set of reference alcohl meters
- High accuracy analytical balance

Engineering Metrology

- Reference hardness testers
- Torque wrench calibrator
- Anemometer calibrator
- Tachometer calibrator

Electrical

- Digital Multimeter
- Stabilized power supply
- Set of standard registors
- Set of standard inductors
- Set of standard capacitors
- Temperature controlled oil batch for the standard resistors

General

- Drying oven
- Air conditioned vehicle-mobile calibration purpose
- X-Y plotter with IEEE-488 interface 3 colour
- Temperature and humidity recorder
- Variable AC/DC power supply
- 10 channel temperature recorder
- Precision multimeter - 02 nos.
- Electronic pulse counter

G. ENGINEERING WORKSHOP

- Shaping machine
- Universal woodworking machine
- Hydraulic press
- Sheet bender
- Lathe machine

H. GENERAL

- Accessories/spares for existing equipment
- Laboratory furniture, and fittings

Table-47 Major Facilities and Equipment Required for an Industrial Pollution Prevention Technical Centre of CISIR

1. MONITORING & LABORATORY EQUIPMENT

- Equipment for toxic substances analysis
- Workshop instruments
- Bottom sampler sets
- Simple type sludge samplers
- Flow meters (for rivers & sea)
- Oil content analyzers
- Eutrophication (enriched nutrient) analyzers
- Ammonia ion meters
- Cyanide ion meters
- TOC analyzers
- Automatic COD meters
- Ultrasonic cleaners (small size)
- Salinity meters
- Microscopes (with camera & television units)
- Oxides-of-sulphur analyzers
- Oxides-of-nitrogen analyzers
- Carbon monoxide analyzers
- Total hydrocarbon analyzers
- Dust meters
- Gas flow meter
- Vacuum boxes for direct sampling
- Phase contrast & PLM Microscopes
- Treating equipment for waste water containing heavy metals
- Stirrer
- Water baths
- Condensation equipment
- Ion-meter with selective electrodes

2. PILOT PLANT EQUIPMENT & MATERIALS FOR FABRICATION

- Clariflocculator & clarifiers
- Continuous sludge drying
- Chemical mixing
- Dosing pumps & metering pumps
- Sludge pumps & screw pumps
- Aerobic reactors
- Anaerobic reactors
- Deaerator
- Cyclones
- Vacuum filter
- Scrubbers
- Materials (ep. Perspex), pumps, pipe fittings, valves, meters, gauzes etc.
- Extruder

3. MOBILE LABORATORY & OTHER FACILITIES

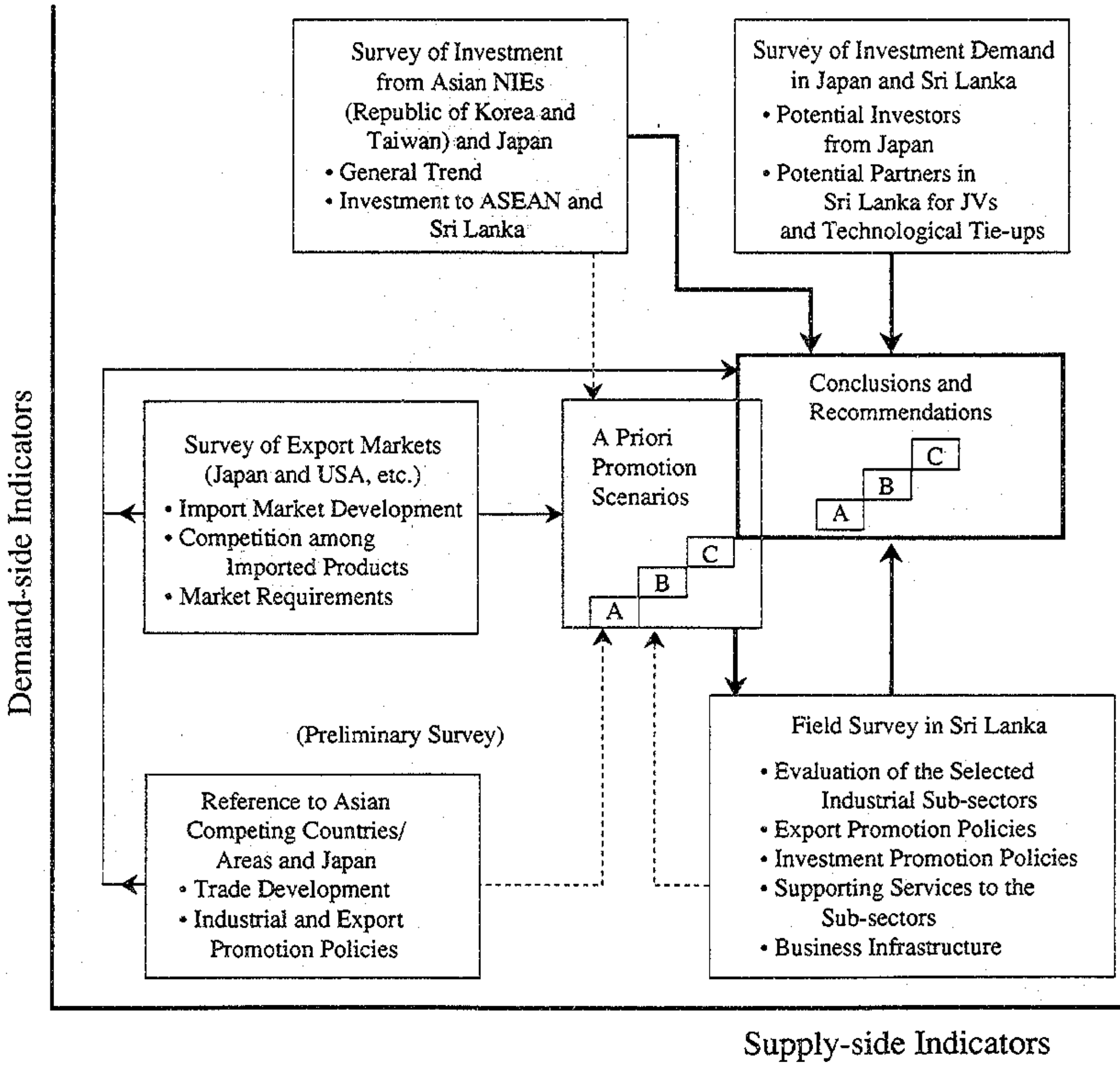
- Mobile Lab (including a generator) with
  a) air quality monitoring equipment
  b) basic water quality monitoring equipment
- Station Wagon
- Air conditioning, storing room, conference room & auditorium and equipment rooms

4. TRAINING EXTENSION & COMMUNICATION FACILITIES

- Computers- (personal computers)
- Speech sound system
- Video system
- Photo copying machine
- Audio visual equipment
- Overhead projector
- Fax machine
- Telephone system
- Telex machine
- Intercom system
- Camera system

Figures

Figure-1 A Framework of the Study on Export and Investment Promotion for Garments & Apparel, Gems & Jewellery and Rubber-based Products Industries in Sri Lanka

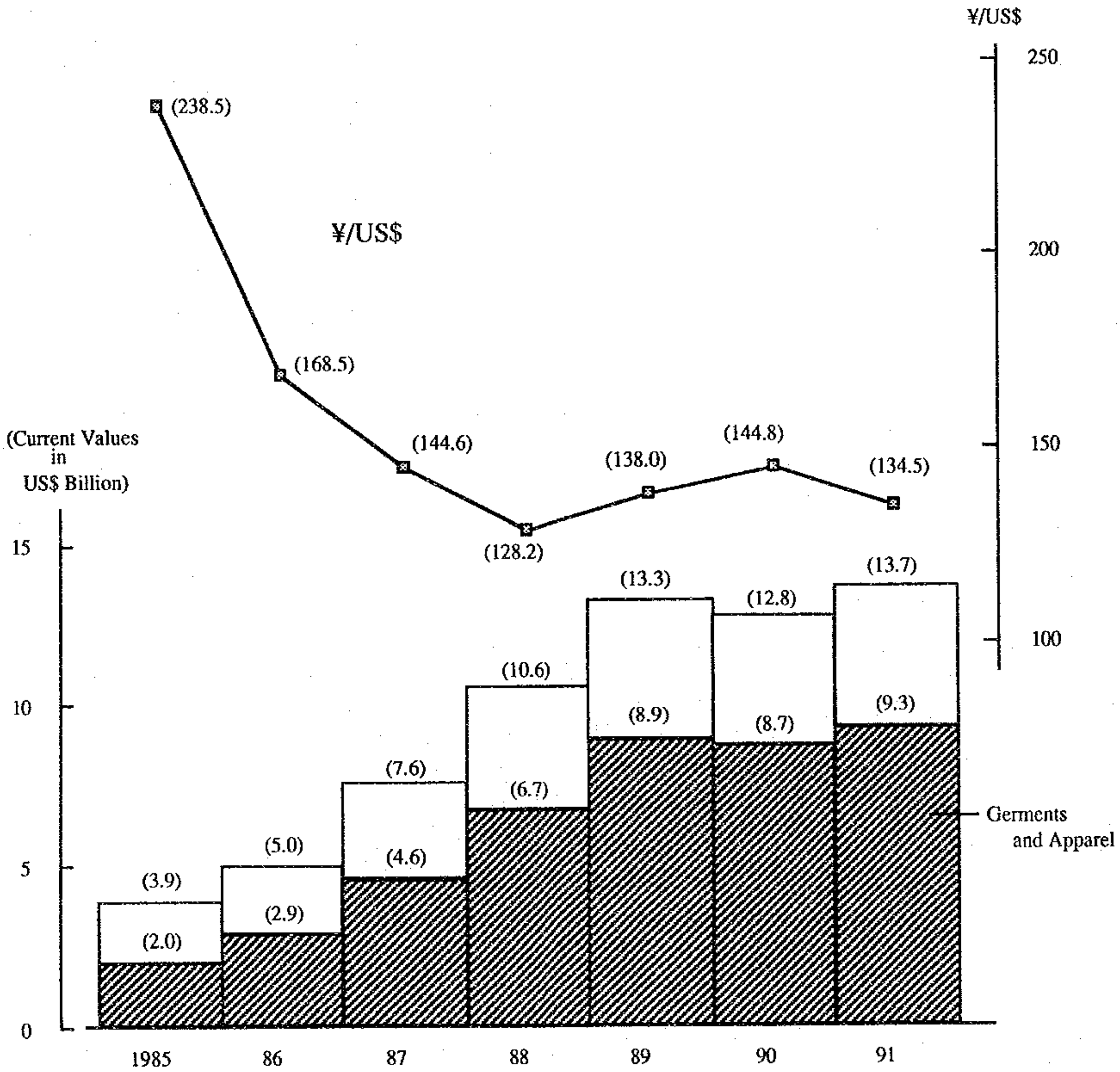


A. Identification of Problems/Constraints
- Production Management
- Marketing Strategies
- Promotion Policies and Supporting Services

B. Setting of Targets and Formulation of Promotion Measures
- Targets of Products and Markets
- Promotion Measures to Achieve Targets
- Strengthening of Supporting Services

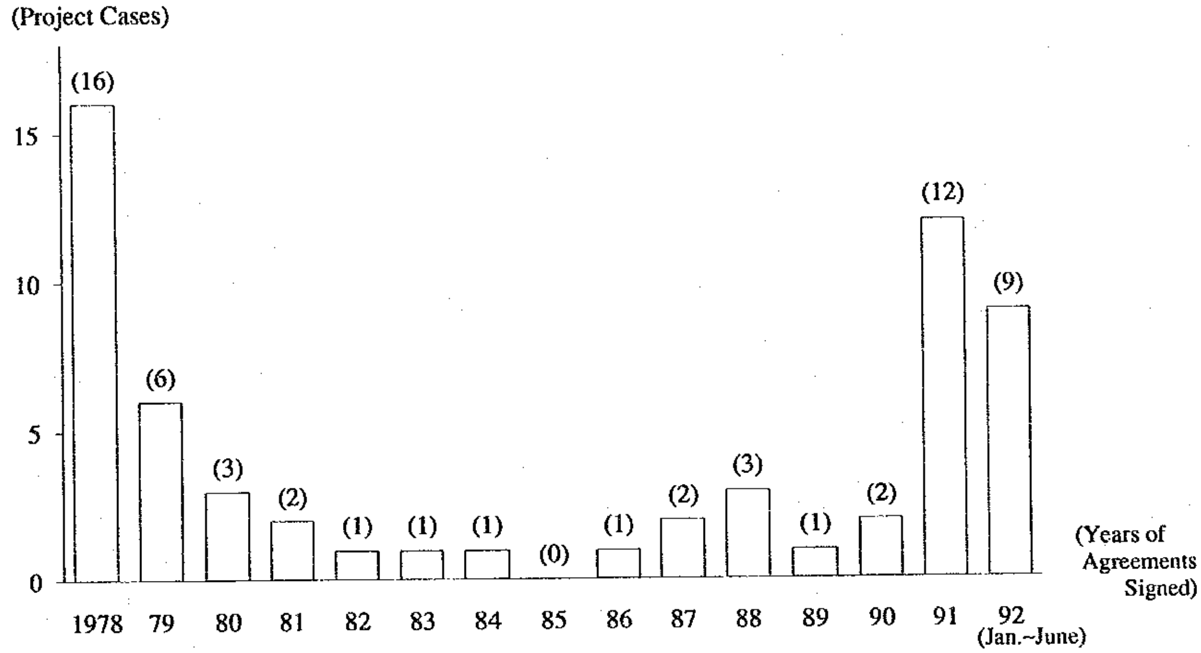
C. Formulation of Promotion Programmes
- Viable Programmes for Sri Lanka
- Action-oriented Promotion Programmes
- Due Consideration of Environmental Protection and Energy Saving

Figure-2 Japan's Import of Textile Products



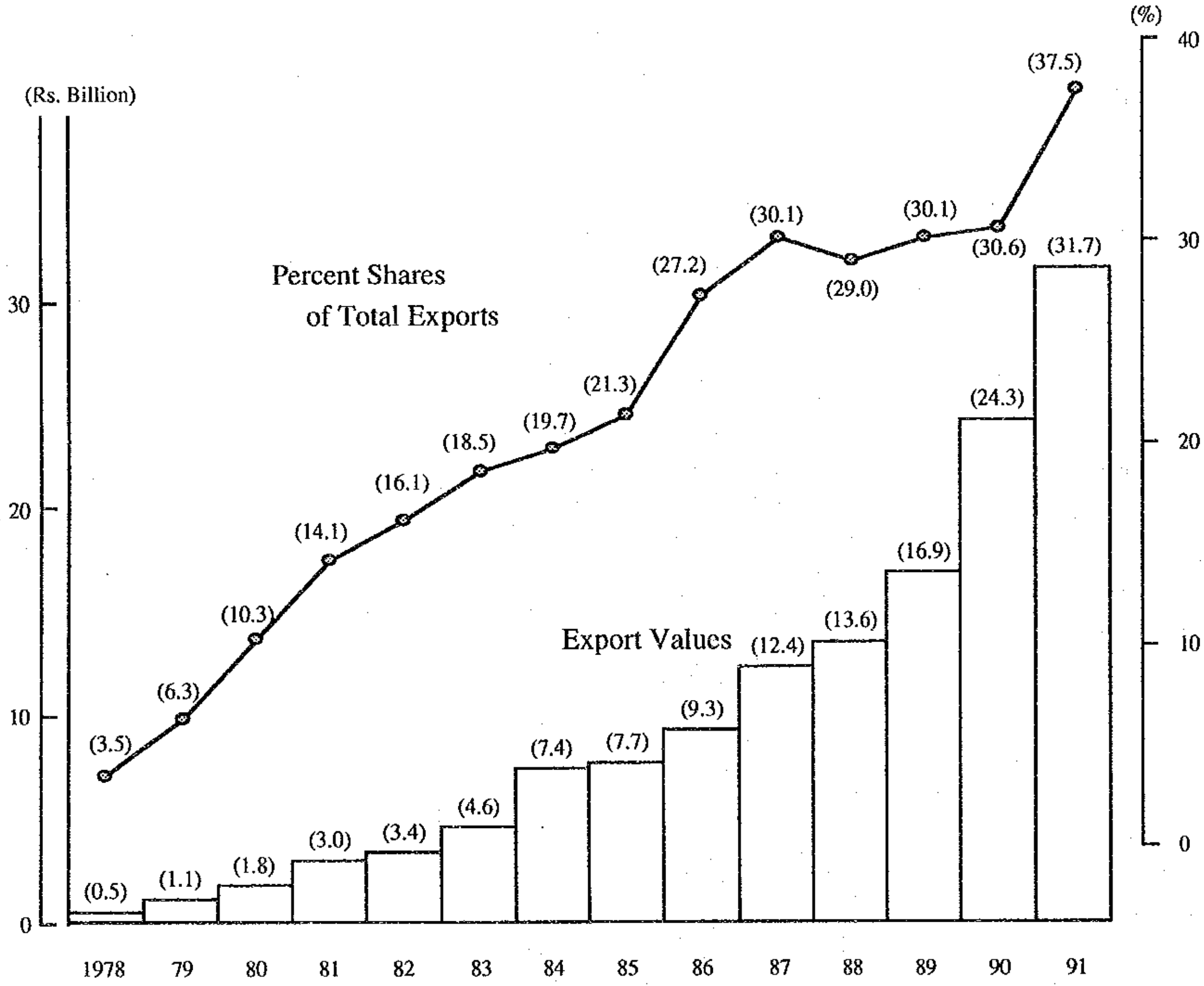
Source: Ministry of Finance, Foreign Trade Statistics,
IMF, International Financial Statistics

Figure-3 Investment Projects of Garments and Apparel Where Agreements with BOI are in Force



Source: GCEC

Figure-4 Export of Garments and Apparel from Sri Lanka



Source: Sri Lanka Customs

Figure-5 Major Issues for the Development and Export Promotion of Garments & Apparel Industries in Sri Lanka

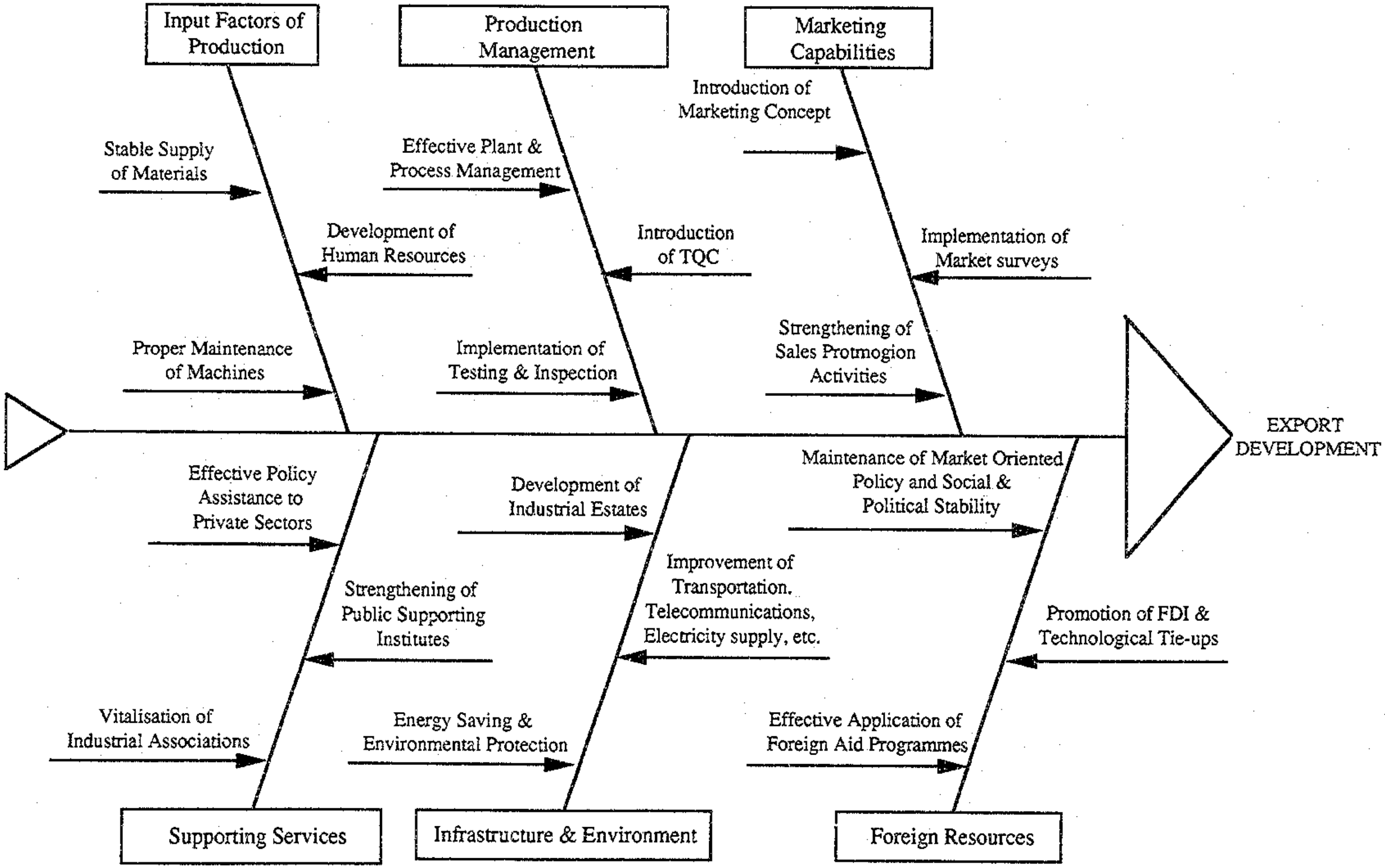


Figure-6 Major Issues for the Development and Export Promotion of Gems and Jewellery Industries in Sri Lanka

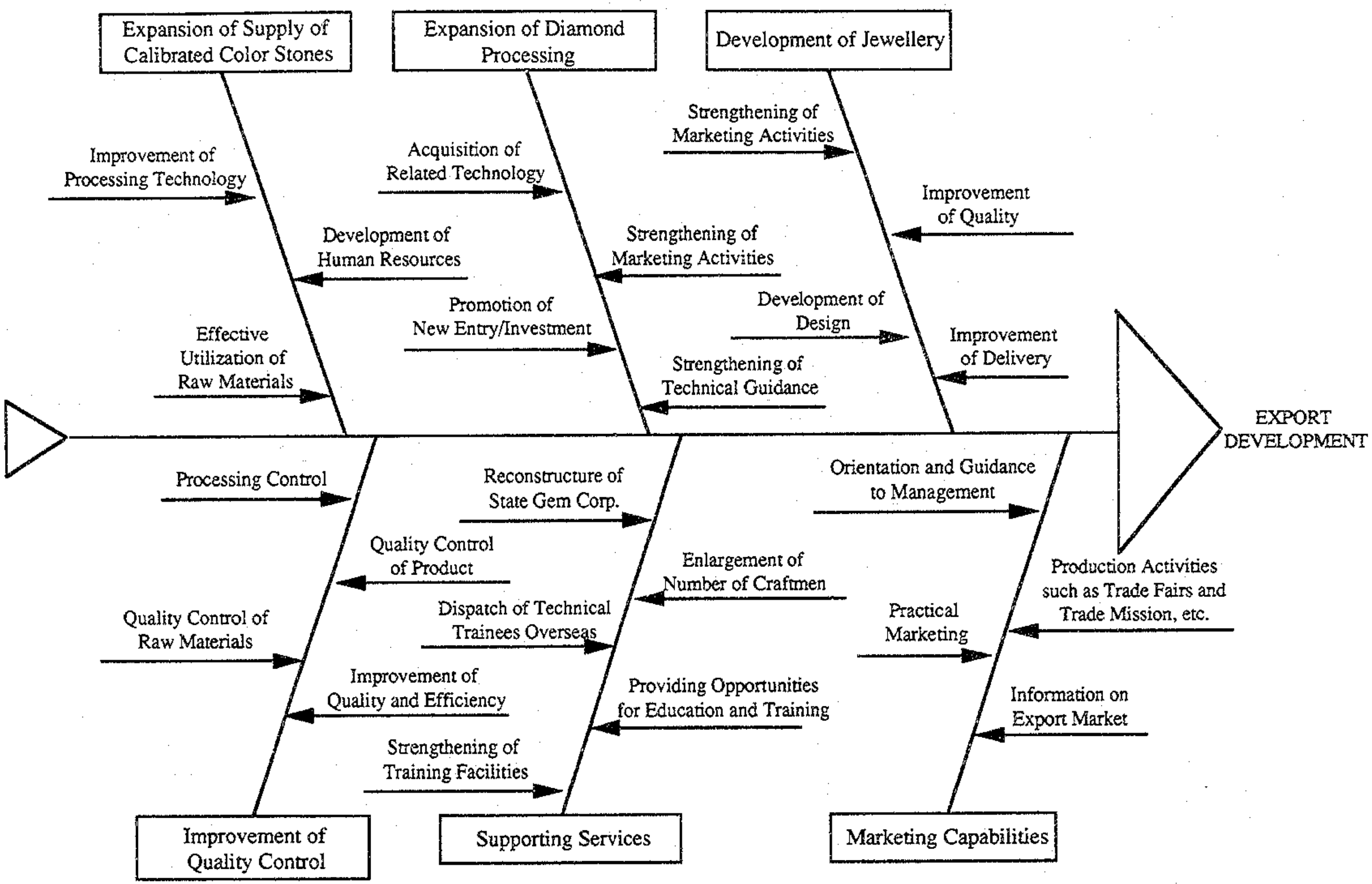
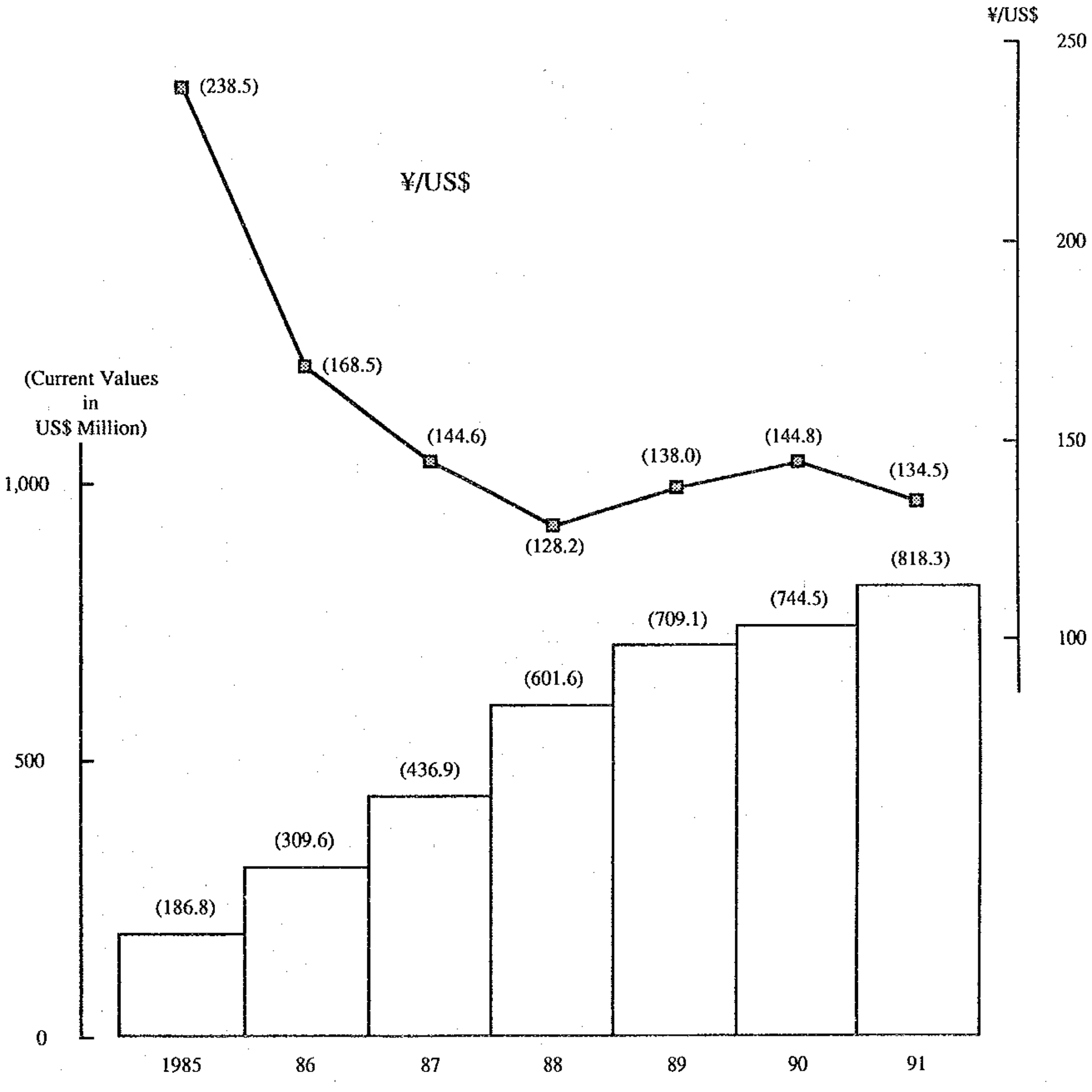


Figure-7 Japan's Imports of Rubber-based Products



Source: Milistry of Finance, Foreign Trade Statistics,
IMF, International Financial Statistics

Figure-8 Major Issues for the Development and Export Promotion of the Rubber-based Products Industry

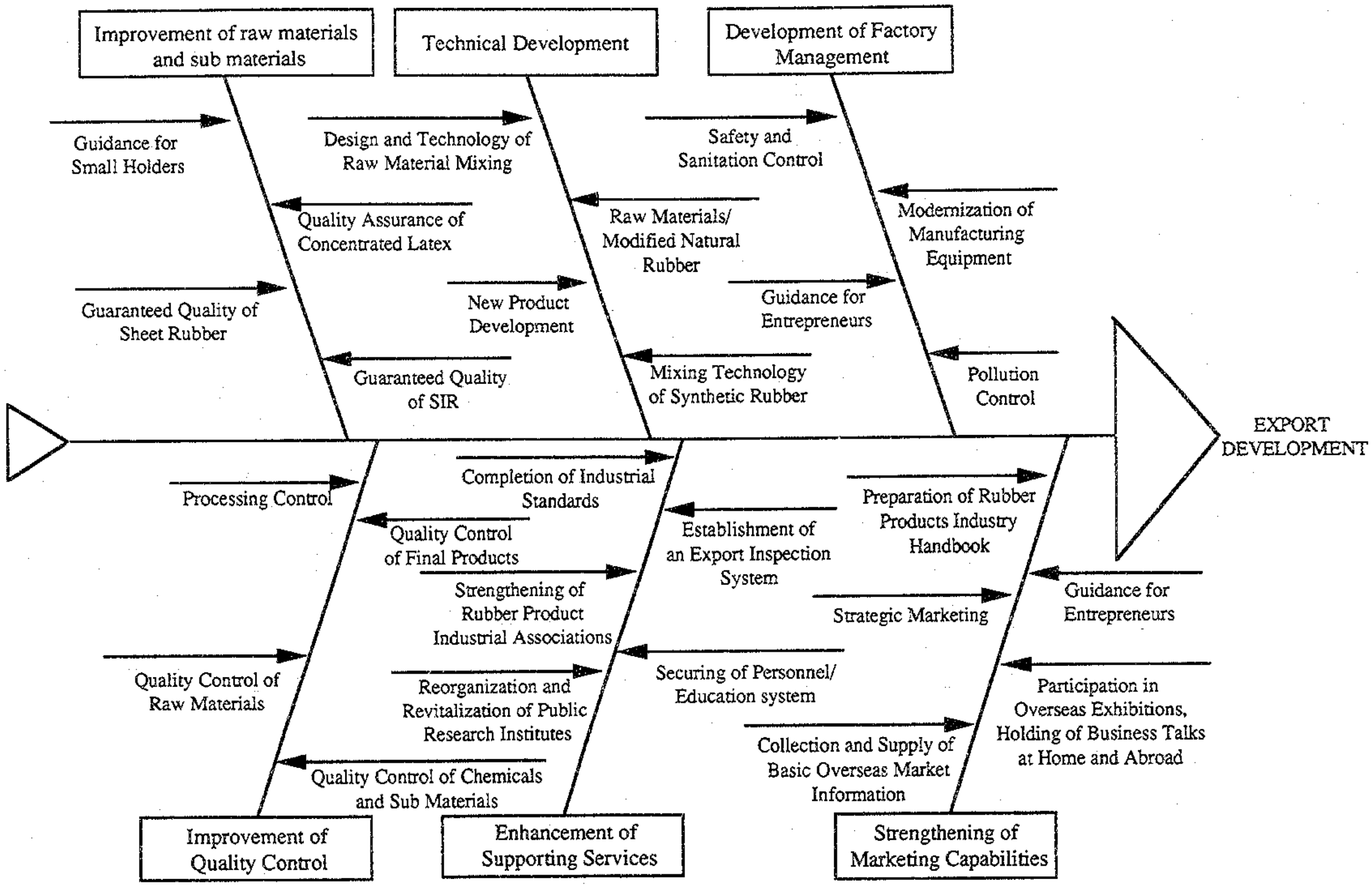
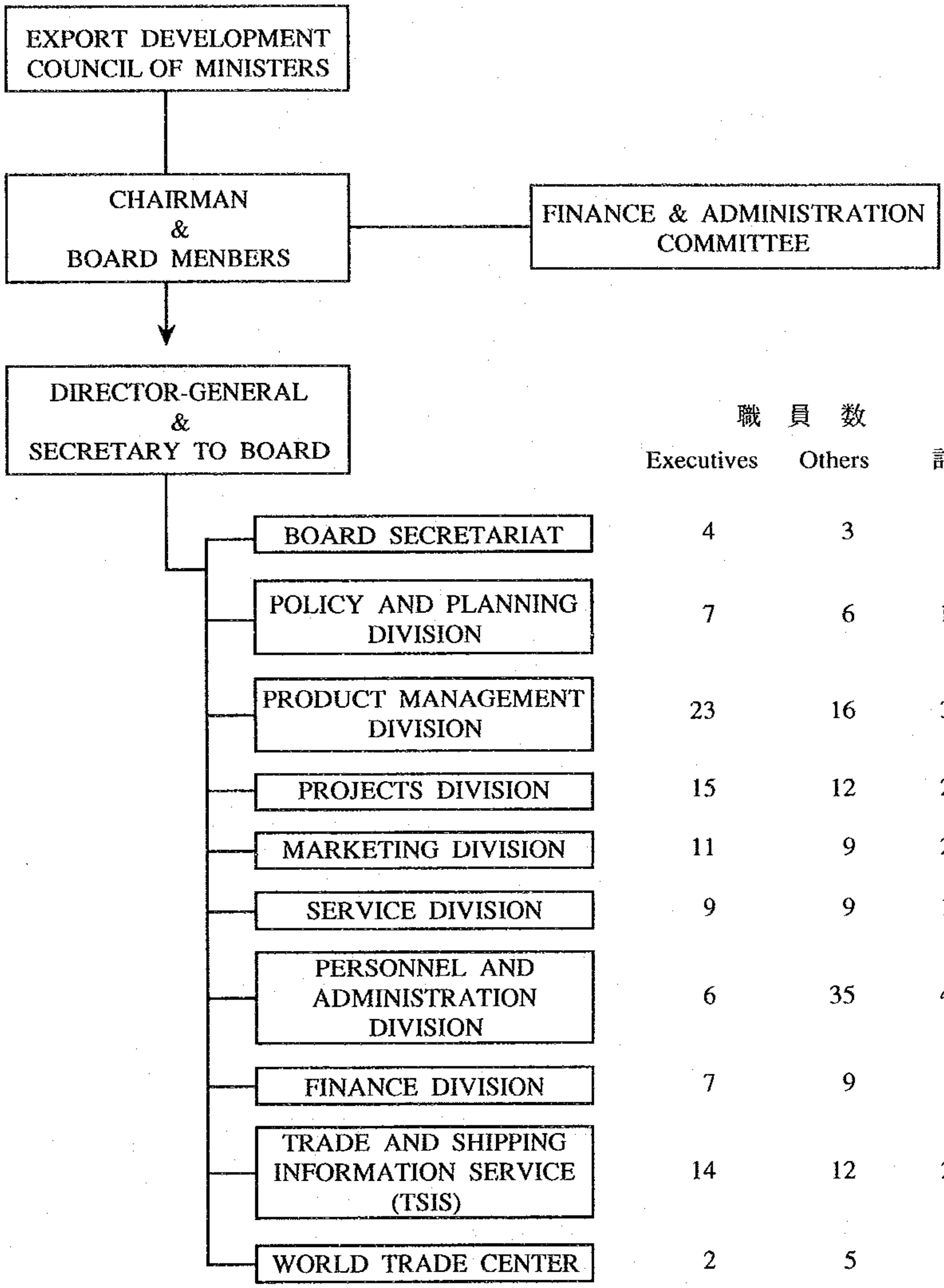
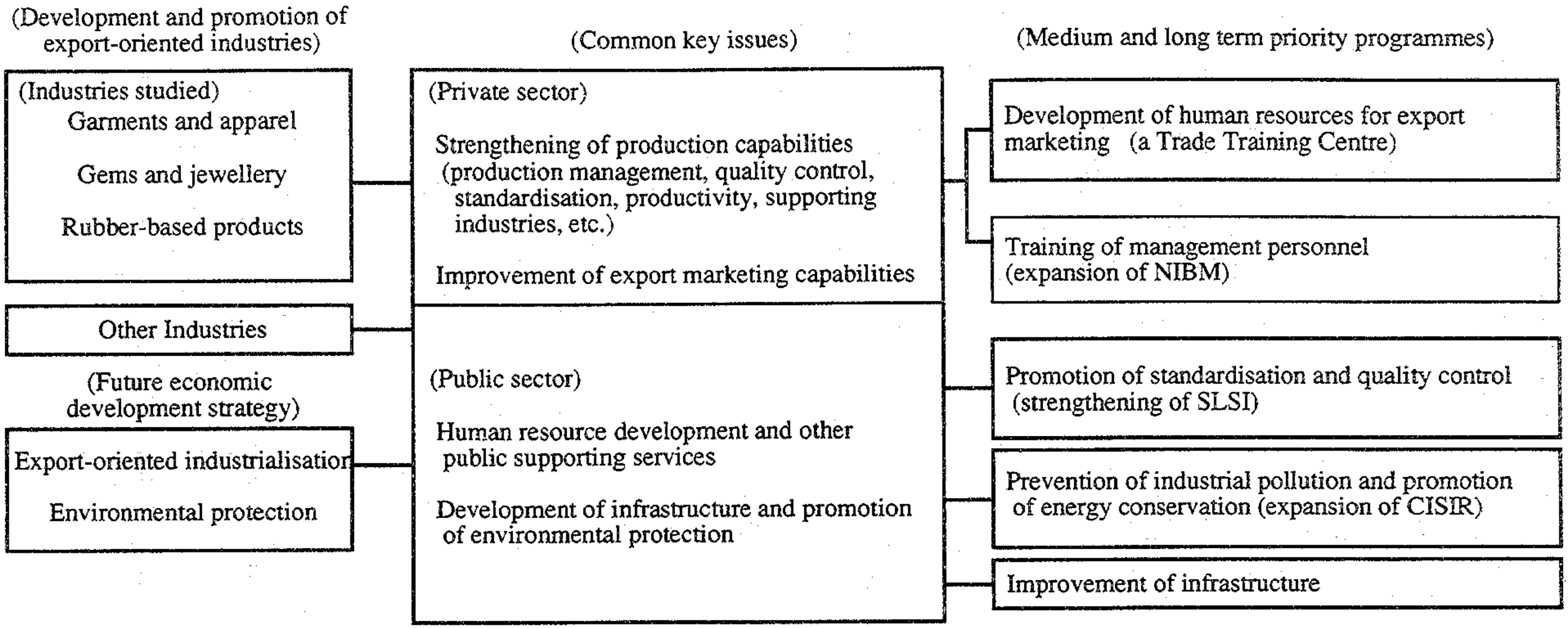


Figure-9 Organisational Chart of EDB



	職員数		
	Executives	Others	計
BOARD SECRETARIAT	4	3	7
POLICY AND PLANNING DIVISION	7	6	13
PRODUCT MANAGEMENT DIVISION	23	16	39
PROJECTS DIVISION	15	12	27
MARKETING DIVISION	11	9	20
SERVICE DIVISION	9	9	18
PERSONNEL AND ADMINISTRATION DIVISION	6	35	41
FINANCE DIVISION	7	9	16
TRADE AND SHIPPING INFORMATION SERVICE (TSIS)	14	12	26
WORLD TRADE CENTER	2	5	7
	98	116	214

Figure-10 Basic Concept of Medium and Long Term Priority Programmes



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