６．専門家の生活環境

スリ・ランカでの生活は、コロンボ周辺地域に居住する場合は、日常生活上、取り立てて不便なことはない。生活必需品の購入も問題なく、医療面では、南西アジアでは整っているほうである。

教育面では、日本人学校もある。治安も一般的には良い。

一方、コロンボより離れた地域に住む場合は、かなり不便となることもある。しかし今回のプロジェクトの場合はコロンボよりの通勤となる可能性が高いので心配ない。

また、治安は一般に良いとは言うものの、北部ジャフナ半島の過激派ＬＴＴＥがときおりコロンボ市内で爆破等のテロを行っており、調査団はまさしくこの種のもと見られるテロのために一時調査を中断せざるを得なかった。現地の専門家は政治集会（集会がテロのターゲットとなった例ある）にはできるだけ近寄らないように指導を受けているそうである。これらの動きを今後十分に把握する必要があるとみられる。（７(1)にて詳細記述）

７．現地の政治状況

1980年代から1991年頃の政治状況については『国別援助研究会報告書1991年３月』に詳細述べられているが、その後の政局のことで今回のプロジェクトに関連あることを以下に記載する。

(1)　爆弾テロ

民族紛争をきっかけにした爆弾テロが、1993年５月に発生したプレマダーサ大統領暗殺等、近年何度か発生している。調査団が現地到着直後（1994年10月24日未明）にもコロンボ市内で爆弾テロが発生し、外出禁止令が出された。11月に開かれる大統領選挙に出馬を予定していたＵＮＰ（統一国民党）の大統領候補者ディサナヤケ氏が爆弾を持ったゲリラに暗殺されるという事件であった。

これらの事件の原因は北部ジャフナ半島の民族紛争であるが、11月に選挙の結果大統領に選ばれたクマラトウンガ女史（その年８月にすでに首相には就任していた）は終結に向けて努力する旨公約している。しかし、政治的テロがいつどこで発生するか予想だにできず、今後も政局と治安には十分に注意すべきである。

(2)　省庁改編について

1994年８月に総選挙によって野党が勝利し、前述クマラトウンガ女史が首相に就任した。その後、11月に女史は大統領に就任。この２つの大きな政治的変動の結果、省庁改編が大幅に行われた。そして、８月に手織物繊維産業省は、新設工業開発省のなかに吸収されることとなり、今回のプロジェクトの所轄も必然的に変更となった。

8．調査団所見

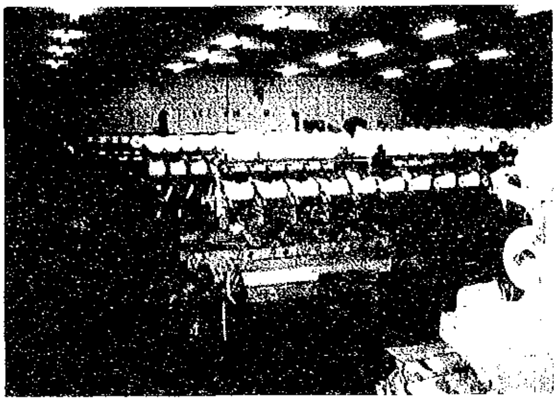
(1) 日本・スリ・ランカ双方の話し合いの結果、実施機関にＣＩＴＩを追加することが全く問題なく決定されたことはプロジェクトの将来にとって非常に喜ばしいことといえる。一方、今後ＴＴ＆ＳＣ及びＣＩＴＩの２つの機関が協力的にプロジェクトを進めていくように日本側も見守っていく必要がある。

(2) 日本側の技術移転項目については、アウトラインは明確化したもののそれぞれがかなり異なる技術なので、実施に向けてより詳細に検討していく必要がある。

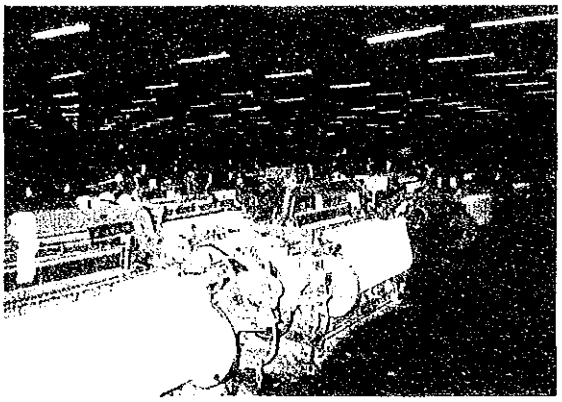
(3) スリ・ランカ側がＴＴ＆ＳＣについての無償協力による移転を強く希望している。これについては日本側も関連機関相互の十分な調整（技術協力のスケジュールとの関連）を行い、前向きに検討する必要がある。

(4) スリ・ランカ標準化研究所（ＳＬＳＩ）・ＥＤＢ・モロツワ大学等のスリ・ランカ内部での関連機関との業務内容の調整や協力関係の設定が今後重要になってくると見られる。特にＳＬＳＩとは具体的にＴＴ＆ＳＣと業務の一部がバッティングしているし、日本側に繊維検査の機材も含めた無償協力を要請している。

(5) 今回の調査団が出会った爆弾事件は不測の事態というべきものであったが、このような治安上の問題が今後どうなっていくか情勢を見守る必要がある。



Pugoda Textiles Lanka Ltd

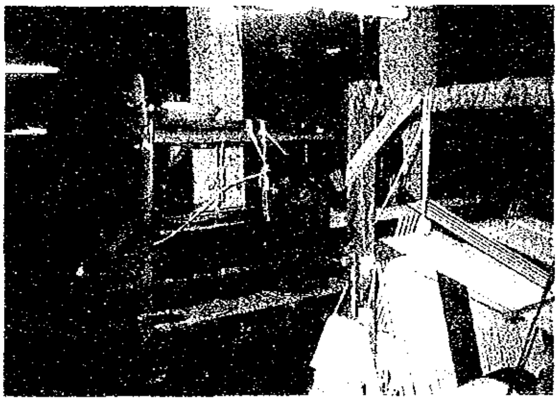


Pugoda Textiles Lanka Ltd

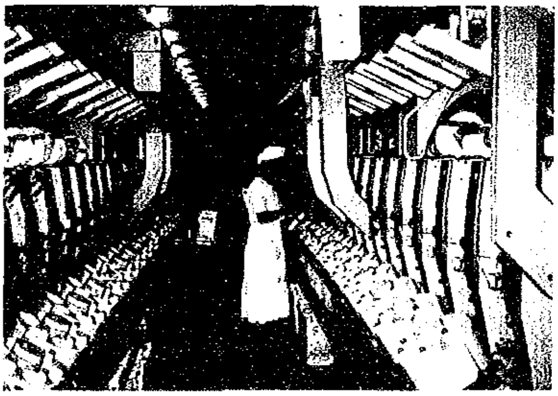
Pugoda Textiles Lanka Ltd

Trendsetters Ltd

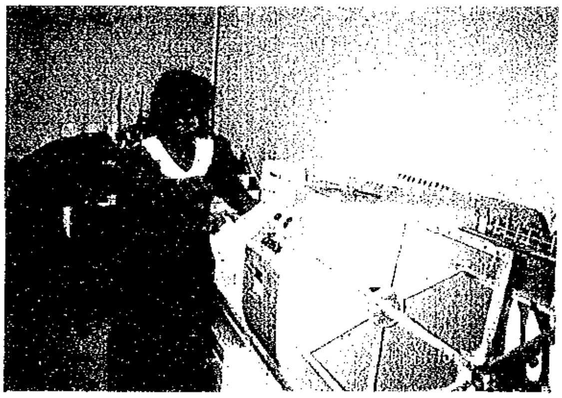
Trendsetters Ltd



Kandygs Ltd

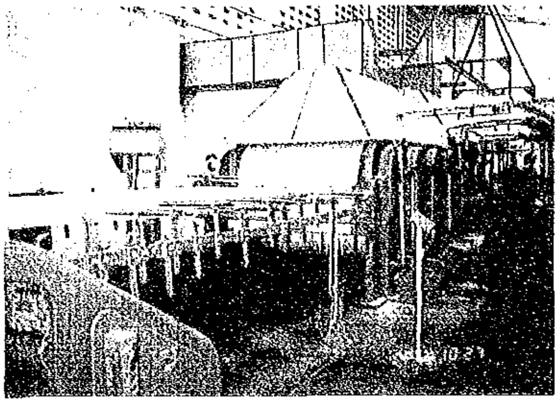


ISIN Lanka Ltd

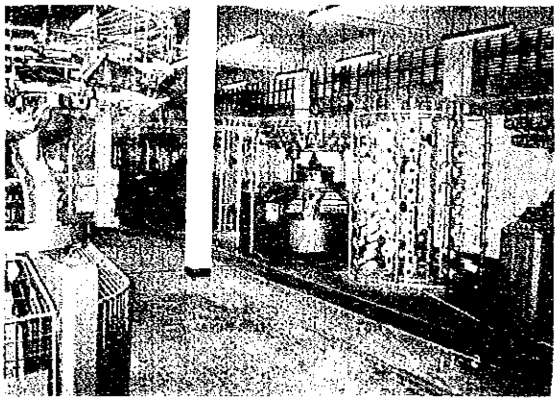


ISIN Lanka Ltd


Ran Fabric Ltd


Darber industries Beam Sizers

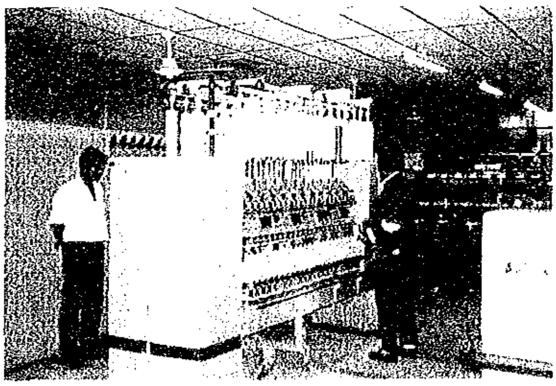

Violin Knitwear Industries Ltd

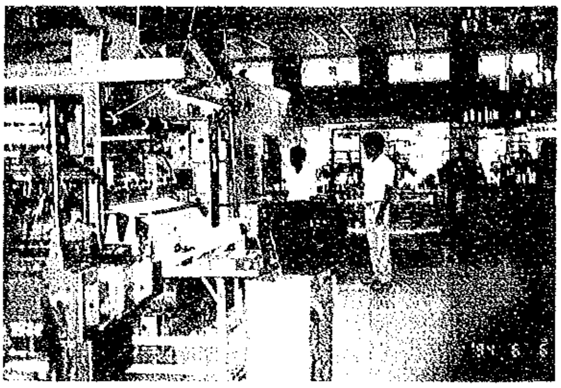

Violin Knitwear Industries Ltd


Violin Knitwear Industries Ltd

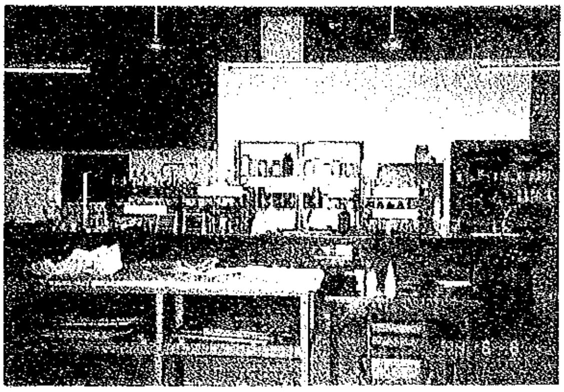

ＴＴ＆ＳＣ（織物部門）


ＴＴ＆ＳＣ（織機分解実習）


ＴＴ＆ＳＣ（紡績部門）

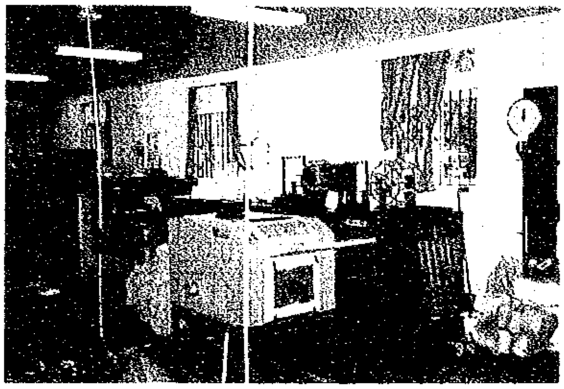


ＴＴ＆ＳＣ（編物部門）

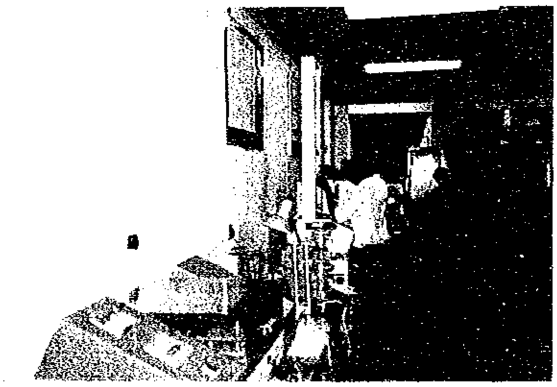


ＴＴ＆ＳＣ（化学試験）

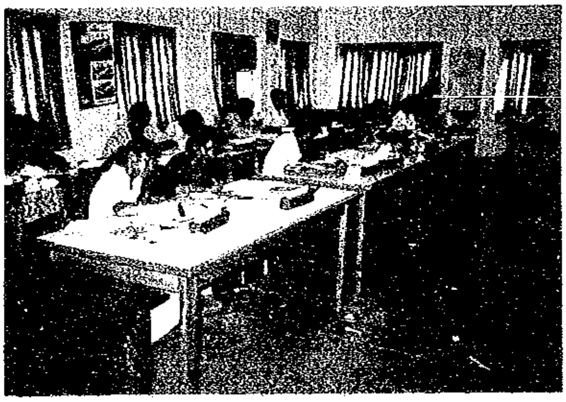
ＴＴ＆ＳＣ（化学試験）



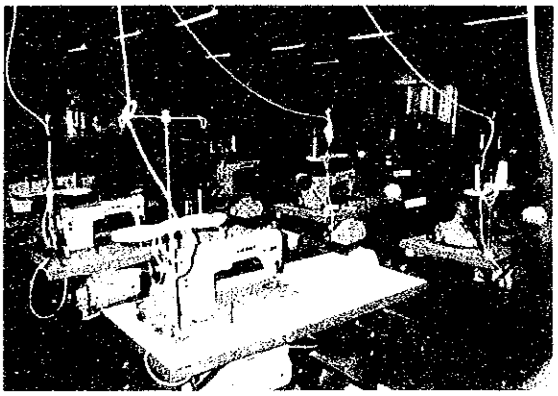
ＴＴ＆ＳＣ（物理試験）



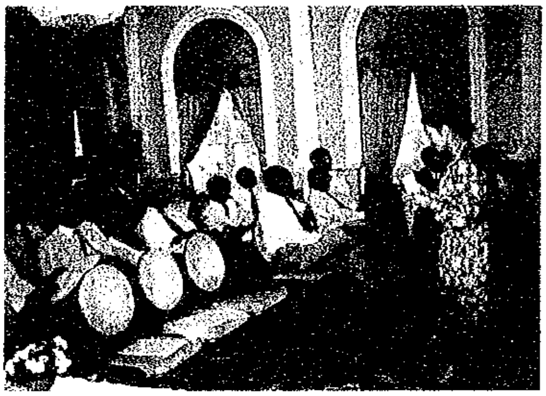
ＴＴ＆ＳＣ（物理試験）



ＣＩＴＩ



ＣＩＴＩ



ＰＣＭワークショップ風景

ＴＴ＆ＳＣの写真は一部調査団派遣前に撮影したものが含まれています。

付　属　資　料

資料１　ミニッツ

資料２　要請書

資料３　スリランカ繊維統計

資料４　スリランカ繊維政策報告書（英文）

資料５　スリランカの繊維産業（論文）

資料６　スリランカの全繊維製造企業リスト（除く縫製業）

資料７　ＴＴ＆ＳＣスタッフの集団コース参加の研修レポート

資料８　ＴＴ＆ＳＣの予算・組織図・レイアウト・新サイト予定地図

資料９　ＣＩＴＩの予算・レイアウト

MINUTES OF DISCUSSION
ON
JAPANESE PROJECT-TYPE TECHNICAL COOPERATION
FOR
UPGRADING TEXTILE TRAINING & SERVICES CENTRE
IN
THE DEMOCRATIC SOCIALIST REPUBLIC OF SRI LANKA

The Japanese Preliminary Survey Team (hereinafter referred to as "the Team") organized by the Japan International Cooperation Agency (hereinafter referred to as "JICA") and headed by Mr. Yuichi Sasaoka, Leader, Deputy Director of Technical Cooperation Division, Mining & Industrial Development Cooperation Department, JICA, visited the Democratic Socialist Republic of Sri Lanka from October 23 to November 4, 1994 for the purpose of clarifying the outline and background of the Project Proposal as well as confirming the feasibility of the Japanese Project-Type Technical Cooperation on Upgrading Textile Training & Services Centre in the Democratic Socialist Republic of Sri Lanka (hereinafter referred to as "the Project").

During its stay in Sri Lanka, the Team exchanged views and had a series of discussions with the officials of Ministry of Industrial Development, Textile Training & Services Centre, Clothing Industry Training Institute and other organizations concerned and also made a field survey to the relevant sites and facilities.

As a result of the discussions, both sides came to the understanding concerning the matters referred to in the document attached herewith.

Colombo, November 4, 1994

Mr. Yuichi Sasaoka
Leader,
Preliminary Survey Team,
Japan International Cooperation
Agency, Japan

Mr. K. Austin Perera
Secretary,
Ministry of Industrial Development,
The Democratic Socialist Republic of
Sri Lanka

Mr.S.L.Seneviratna
Director General,
Department of External Resources,
Ministry of Finance,
The Democratic Socialist Republic of
Sri Lanka
(WITNESS)

ATTACHED DOCUMENT

1. Background of the Project

The textile & garment industry is a dominant industry in Democratic Socialist Republic of Sri Lanka and has a rapid and prominent growth these years. Especially, garment has become a leading export product of Sri Lanka. The export values of garments share 50% among the total products and surpassed those of traditional export crops such as tea, rubber and coconuts.

The Government of Sri Lanka has taken several policies in order to develop the textile & garment industry by way of increasing apparel factories and making incentives to textile industries.

The growth of garments export depends mainly on low-wage, educated and sufficient labor force. In addition, favorable international trade situation, such as Multi Fibre Arrangement (MFA) with the United States and European countries makes Sri Lankan garments more advantageous than other garment-exporting countries. However, major materials of garments are imported from other countries and value added rate of garment in Sri Lanka amounts to only 27%. It is because the fabrics & yarns manufacturing sector in Sri Lanka is still underdeveloped. Moreover, MFA will be scheduled to expire in the year of 2003.

Considering these circumstances, Sri Lanka should take measures to sustain the growth of the industry through improving the product competitiveness after the termination of MFA. Therefore, the fabrics & yarns manufacturing sector is to be strengthened to increase domestic supply of high quality fabrics, so that it can contribute to supply and export of high quality garments.

The Government of Sri Lanka has set up and expanded the Textile Training & Services Centre (hereinafter referred to as "TT&SC") in collaboration with UNDP/UNIDO from 1982 to 1990, in order to develop the textile industry, especially fabrics & yarns sector.

In 1993, the Government of Sri Lanka requested the Government of Japan to provide the Project-Type Technical Cooperation and Grant Capital Aid for TT&SC to improve the skills and technologies of textile sector and relocate to and expand facilities of TT&SC.

2. Objective of the Project

(1) Overall Goal

The textile and garment industry in Sri Lanka will develop and it will have the product competitiveness both at home and abroad.

(2) Project Purpose

TT&SC and Clothing Industry Training Institute (hereinafter referred to as "CITI") will acquire the advanced skills and technologies in the field of textile & garment through the Japanese project-type technical cooperation, so that TT&SC and CITI will be able to provide local industries with more qualified technical services, such as training, consulting and testing.

3. Project Title(Tentative)

Upgrading Textile Training & Services Centre.

4. Implementing Agency of the Sri Lankan Side

Ministry of Industrial Development will have overall responsibility for the Project. The Project will be implemented by TT&SC and CITI.

5. Duration of the Project

The duration of the technical cooperation by the Government of Japan through JICA will be five (5) years from the date agreed by both sides in the Record of Discussions (R/D) for the Project.

6. Site and Facilities for the Project

Site and facilities of TT&SC and CITI will be utilized for the Project.

7. Scope of Technical Cooperation

The scope of technical cooperation will cover the following fields;

1) Quality Assurance System
2) Weaving Technology
3) Dyeing & Finishing Technology
4) Apparel Technology
5) Testing Technology
6) Others

(Knitting Technology, Electric & Electronic Engineering, Pollution Control and so forth)

8. Measures to be taken by the Japanese Side

In accordance with the laws and regulations in force in Japan, the Government of Japan will take, at its own expense, the following measures through JICA according to the normal procedures under the Colombo Plan Technical Cooperation Scheme after the beginning of the Project.

- Dispatch of Experts
- Provision of Machinery and Equipment
- Training of the Sri Lankan Counterpart Personnel in Japan

9. Measures to be taken by the Sri Lankan Side

In accordance with the laws and regulations in force in Sri Lanka, the Government of Sri Lanka will take, at its own expense, the following measures for the preparation of the Project before the beginning of the

Project.

(1) Establishment of Steering Committee of the Project.
(2) Provision of office and training facilities.
(3) Assignment of enough number of the qualified counterpart personnel and administrative staff.
(4) Preparation of the necessary amount of recurrent budget.

10. Others

The Team suggested to the Sri Lankan Side that it would be necessary to reformulate the project proposal of TT&SC when the Project would include Quality Assurance System and Apparel Technology as a part of the Scope of Technical Cooperation.It is becauce quality control is very important in both the textile and garment sectors in Sri Lanka and those two sectors are not well linked and coordinated due to the relatively low quality of the fabrics.The Team also suggested that CITI as an implementing agency could be joined for the promotion of the modified Project to achieve the project purpose more successfully.The Sri Lankan Side agreed to the Team's suggestion.

The Team explained that the joint collaboration plan on the management and technology for TT&SC and CITI must be formulated and also requested the Sri Lankan Side to report it in the new project proposal.The collaboration plan would cover the schedule during and after the implementation of the Project period.

The Team stated that upon reception of the new project proposal from the Sri Lankan Side, the Japanese Side would dispatch some experts for supplementary survey in order to collect further necessary information about scope of technical cooperation and to make lists of machinery and equipment and so forth before its implementation.

6 28

LIST OF THE ATTENDANTS

<The Japanese Side>

Mr.Yuichi Sasaoka (Leader)	Deputy Director, Technical Cooperation Div., Mining &Industrial Development Cooperation Dep., JICA.
Mr.Kazumi Sagisaka (Technical Cooperation Policy)	Chief of International Cooperation Unit, Planning Div., General Affairs Dept., International Trade & Industry Inspection Institute, Ministry of International Trade & Industry.
Mr.Nobuhiro Tsutsumi (Textile Technology)	President,TheCotton & Staple Fiber Fabric Inspecting Institute Foundation.
Mr.Shoji Kobayashi (Apparel Technology)	Chief of the Apparel System Dept.,TOBU Business Centre, Japan Textile Products Quality & Technology Centre.
Ms.Kakiko Ide (Moderator of Workshop)	Regional Planner,Regional Planning International Co. LTD.
Mr.Takayasu Horimoto (Coordinator)	Staff,Technical Cooperation Div., Mining & Industrial Development Cooperation Dept., JICA.
Mr.Jiro Iida	Additional Resident Representative, JICA Sri Lanka Office.

<The Sri Lankan Side>

Mr.S.L.Seneviratna	Director General, Department of External Resources, Minisry of Finance.
Mr.K.Austin Perera	Secretary, Ministry of Industrial Development.
Mr.W.Jayamaha	Additional Secretary, Ministry of Industrial Development.
Mr.E.Pararajasingham	Chairman, Textile Training & Services Centre, Ministry of Industrial Development.
Mr.R.H.Tennekoon	Director, Textile Training & Services Centre, Ministry of Industrial Development.
Mr.R.U.Kuruppu	Director, Clothing Industry Training Institute.

資料2　要請書

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විදුලි පණිවුඩ / தந்தி / Telegrams } විදෙස් / FORAID

ටෙලෙක්ස් / ரெலெக்ஸ் / Telex } FORAID Colombo 21232

ෆැක්ස් / பெக்ஸ் / Fax } 447633

විදේශ සම්පත් දෙපාර්තමේන්තුව
මුදල් අමාත්‍යංශය
வெளிநாட்டு வள திணைக்களம்
நிதி அமைச்சு
DEPARTMENT OF EXTERNAL RESOURCES
Ministry of Finance

මගේ අංකය / எனது இல. / My No. } TA5/0/1 - M

ඔබේ අංකය / உமது இல. / Your No. } L/93/181/H/C

මහලේකම් කාර්යාලය (3 වැනි මහල)
செயலகம், (3ம் மாடி)
The Secretariat, (3rd Floor)

තැ. පෙ. 277, කොළඹ 1
த. பெ. இல. 277, கொழும்பு 1
P. O. Box 277, Colombo 1.

19.. 4th August 1993

BY HAND

Mr. Hiroyuki Kinomoto,
Second Secretary,
Embassy of Japan in Sri Lanka,
Colombo.

Dear Mr. Kinomoto,

JICA - Project Type Technical Cooperation
Requirements of the Government of Sri Lanka
for the Financial Year 1994/95

With reference to your letter dated June 14, 1993, I am glad to forward herewith a schedule indicating the Sri Lanka Government's requests for assistance under Project Type Technical Cooperation.

As you are aware, a decision has been taken to carry out a demand survey for Japan Technical Assistance annually, starting from this year, in order to select the most appropriate projects for the development activities in Sri Lanka. The response is relatively poor, and that may be due to lack of awareness of the policies, priorities and procedures of the project type Technical Cooperation scheme among the Government Agencies. Therefore, the limited number of requests do not mean that we are not interested in this facility. Infact, I expect a better response next year. We may review the information gathering documents again before we carry out next year's survey.

As the number of requests for the year is ten the priorities assigned to them may not be necessarily strictly followed. We will accept your decision in selecting the most suitable requests for funding. However, I am not certain if sufficient information has been provided by the executing agencies, and if not kindly let me know early so that, we would be able to provide additional information to your authorities in time, to enable them to undertake more projects in the next financial year.

Thank you for your kind co-operation and assistance in this matter.

Yours sincerely,

REQUIR... .TS OF THE GOVERNMENT OF SRI LANKA FOR FY 1994/95

Priority	Ministry	Executing Agency	Title o. .ne Project	Field	Main Objective.	Estimated Cost	Justification
1	Handloom & Textile Industries (H & T I)	National Institute Textile & Clothing (NITC)	Upgrading Textile Training & Services Centre (TTSC)	Textile Technology	To meet the shortage of trained & skilled personnel in the growing Textile & Clothing Industry.	Local cost Rs. 13.5 Mn.	This request is combined with Grant Aid request. The field is considered as a priority area to generate more employment opportunities and thereby to generate higher income in relation to the rural community.
2	Agriculture Development & Research (A D & R)	Rice Processing, Research & Development Centre. (RPRDC)	Development of Rural Crop Handling and Agro-processing Technologies Project	Agro-based Rural Industries	Development & dissemination of appropriate technologies for rural level primary & secondary processing of field crops.	Yen 185,760,800	Development of appropriate Technologies for agro-processing would be an advantage from the point of view of income & employment generation of the rural population.
3	- do -	Dept. of Animal Production & Health	Establishment of an Animal Quarantine Station.	Veterinary Science	To prevent the introduction and spread of exotic animal diseases and thereby avert immense economic losses to the animal industry in Sri Lanka.	Local recurrent cost Rs. 2.724 mn.	This request is combined with a Grant Aid request. In the recent past, the livestock sector has expanded rapidly and a sharp increase in importation of improved stock. Animal Quarantine Services need to be upgraded to cope with the developments in the sector.
4	- do -	Dept. of Agriculture	Establishment of a Pesticide Research & Analytical Facility	Agro-Pesticide.	To provide Physical, Technical & Human Resources upgradings for law enforcement leading to long term development enforcement leading to long term development of Agriculture Economy.	—	Sri Lanka economy is primarily based on agricultural sector & usage of pesticide is on the increase. It is essential to minimise social & economical loss due to misuse and abuse of pesticide in Sri Lanka.
5	Youth Affairs & Sports (Y.A.& S.)	Ministry. (Youth Employment planning division.	Integrated Programme for Technology ...... to Rural Sector. (YEPD)	Rural Technology	To absorb the rural labour to utilize the resources in the rural sector to increase production by introducing appropriate technologies in rural sector.	Local cost Rs. 29.3 mn.	Development of the Rural Sector is one of the prime objectives of the government. Gainful employment of rural surplus labour lead to economic & social development of rural areas. Diversification of economic activities by introducing appropriate technologies is important.

REQUIREMENT OF THE GOVERNMENT OF SRI LANKA FOR ...

Priority	Ministry	Executing Agency	Title of Project	Field	Main Objectives	Estimated Cost	Justification
6	Policy Planning & Implementation (PP & I)	Dept. of Census & Statistics (DCS)	Agricultural Information Project	Statistics	To establish & maintain an up to date agricultural data base to be utilized for Agricultural Policy Planning and, to monitor the progress of agricultural sector in reginal as well as national level.		Agriculture is the main sector of Sri Lanka economy and the success for policy making, planning and implementation of Agricultural Projects relive on the quality of the data.
7	Health & Women's Affairs	Ministry	Nurses Training Centre (NTC)	Nursing Education	To provide nurses training for the new recruitment. To provide training for nurses already in the service to up-date and up-grade their knowledge and skills, by utilizing modern teaching meterials and techniques.		This request is combined with a grant request. This was submitted to the Govt. of Japan in 1992 and has been selected to be considered in 1994.
8	Youth Affairs and Sports	National Apprentice & Industrial Training Authority. (NAITA)	Automobile Training Centre	Automobile Training	To enhance the capacities and facilities available in the training centre by providing further Technical Assistance.		This project was funded under the JICA Grant Aid Scheme. In order to enhance the objectives of the project it is necessary to implement a Technical Assistance project. This request was also submitted to Govt. of Japan in 1993 and has been selected to be considered in 1994.
9	Industries, Science & Technology	Lanka Ceramic Ltd.	Ceramic Training & Service Institute	Ceramic Technology	It is envisaged that proposed training centre will function as an extention of the Ceramic research & Development Centre (CRDC) with expertise drawn from within CRDC as well as from prestigious Ceramic Research Centers from Japan		Sri Lanka is richly endowed with mineral resources and mineral based industries constitutes the largest of the manufacturing concerns in Sri Lanka. The Ceramic Industry has expanded rapidly during the last two decades, but there is no training institute in Sri Lanka to enhance human resources in this field.
10	Policy Planning and Implementation	Dept. of National Planning	Upgrading of the Centre for Development Information	Information Science	To provide upto date information service for planning & decision making in the country at the national level.		The necessity of having a reliable and accurate information system for National Development Planning and Plan Implementation has been realized by Policy Making Agencies in Sri Lanka.

資料３　スリランカ繊維統計

TEXTILE STATISTICS OF SRI LANKA.

1993

MINISTRY OF HANDLOOMS & TEXTILE INDUSTRIES.
"VILASITHA NIVASA"
NO : 375 , HAVELOCK ROAD,
COLOMBO 06.

PREFACE

The Textile Industry is by far the largest manufacturing activity in Sri Lanka, in terms of production, employment and foreign currency earnings. This means that the Sri Lankan economic and social development is very much influenced by the progress of the textile sector. Therefore, information regarding the industry is indeed of vital importance for individual enterprises, for their corporate plans, and for the Government for its support.

Published and unpublished data covering the industry is available with various State Agencies and Trade Chambers. The Ministry has attempted to collect, collate and arrange the data in a systematic manner in this publication titled 'Textile Statistics of Sri Lanka'. It is the intention of the Ministry to update and publish Textile statistics at regular intervals.

I wish to express my appreciation to the large number of manufacturers who responded to the request of the Ministry and to the officials of the Ministry who prepared the statistics.

W. Jayamaha
Secretary,
Ministry of Handlooms & Textile Industries.

9th August 1994

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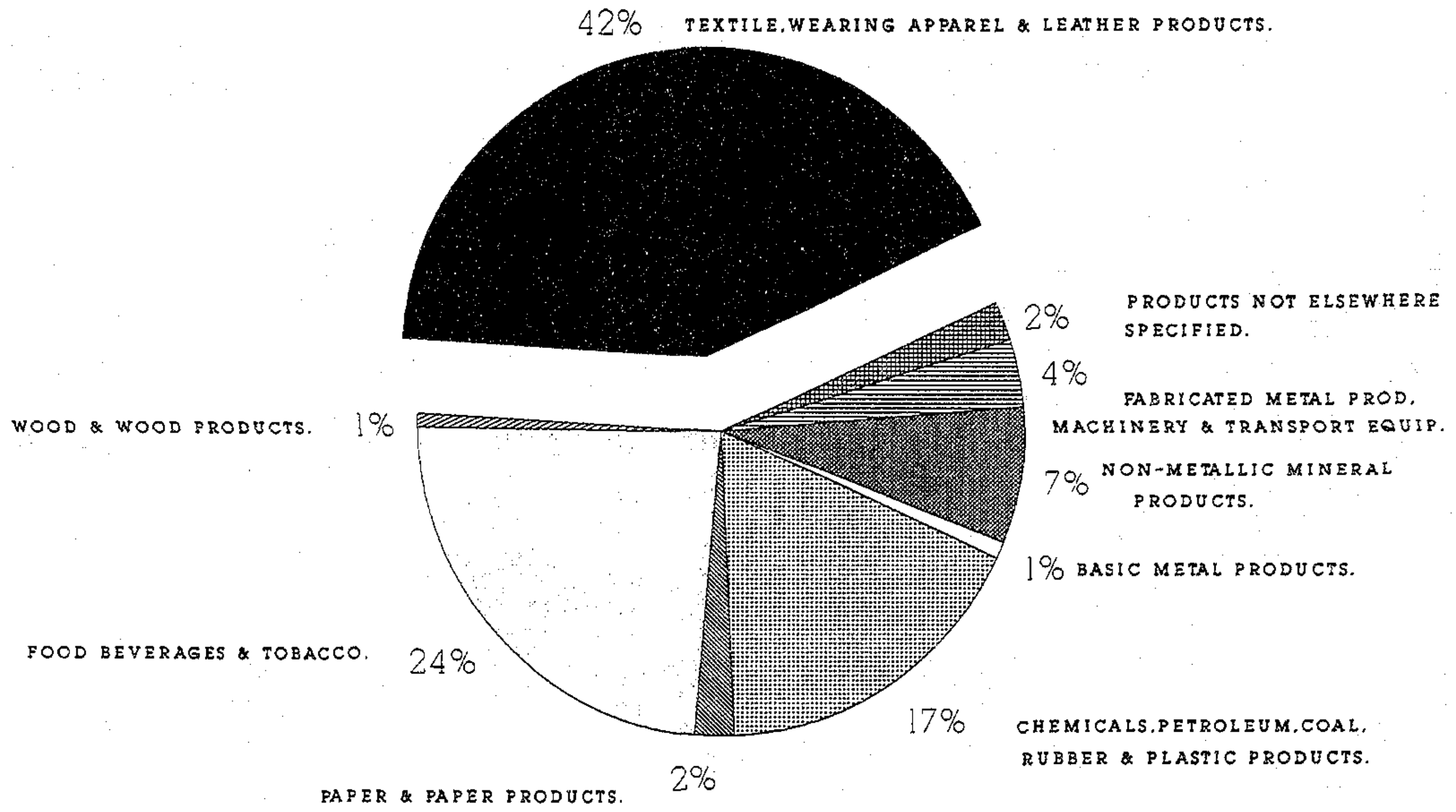
AUGUST, 1994
STATISTICS BRANCH.

VALUE OF INDUSTRIAL PRODUCTION - 1993.



TOTAL VALUE =166,466 (MILLION RS.)

Source :- Central Bank

PRODUCTION

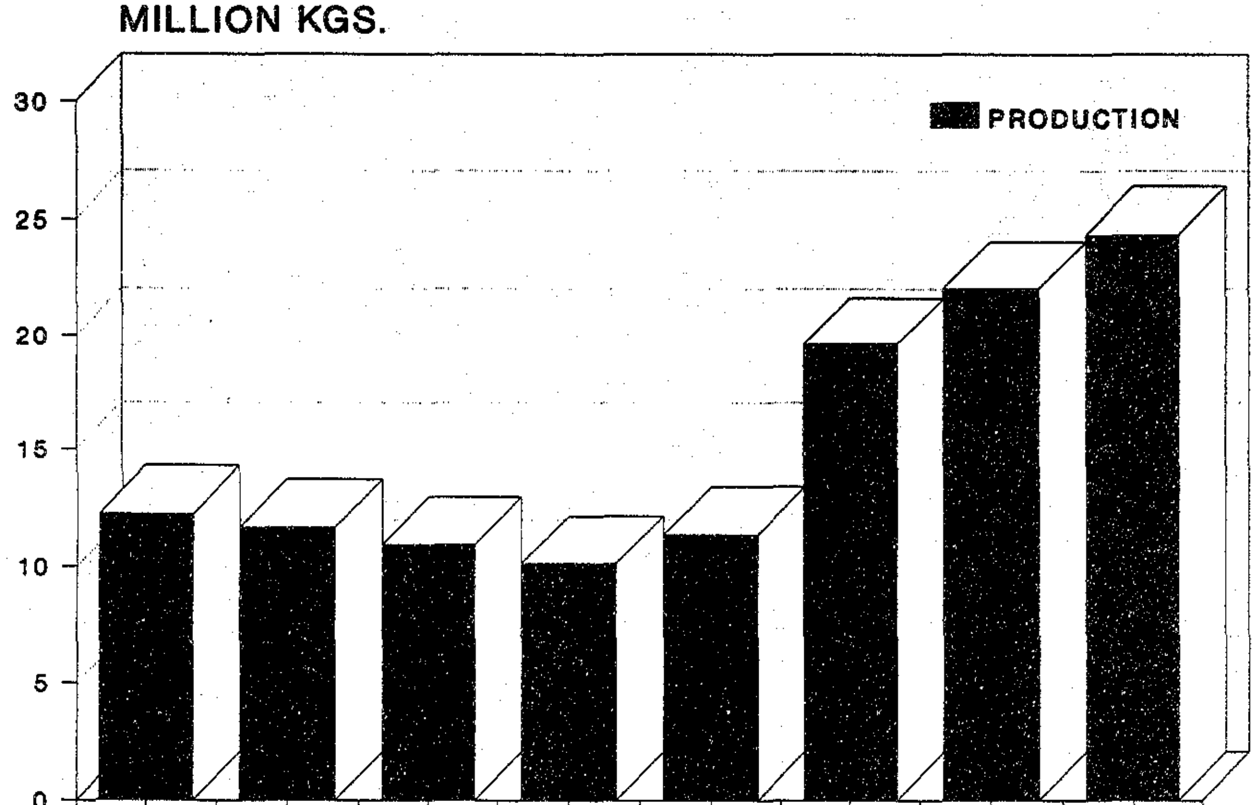
TABLE I

ITEM	UNIT	YEAR							
		1986	1987	1988	1989	1990	1991	1992	1993
1. YARN	MILLION KGS.	12.282	11.718	10.981	10.158	11.398	19.620	22.040	24.365
1.1 SPUN	"	12.220	11.480	10.700	10.020	11.226	19.620	22.040	24.365
1.2 FILAMENT	"	0.062	0.238	0.281	0.138	0.172	N.A.	N.A.	N.A.
2. FABRIC	MILLION METERS	140.6	142.2	125.8	130.5	144.5	181.4	187.337*	211.175*
2.1 WOVEN	"	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	169.317*	187.915*
2.2 KNITTED	"	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	18.020*	23.260*
3. GARMENT (EXPORT ONLY)	MILLION PCS.	171.00	187.89	185.48	185.85	212.44	241.85	315.77	362.592
3.1 WOVEN	"	N.A.	N.A.	115.51	105.66	91.11	102.89	144.49	167.356
3.2 KNITTED	"	N.A.	N.A.	69.97	80.19	121.33	138.96	171.28	195.236

SOURCE - MINISTRY OF HAND LOOMS & TEXTILE INDUSTRIES. /
SRI LANKA CUSTOMS.

* PROVISIONAL.

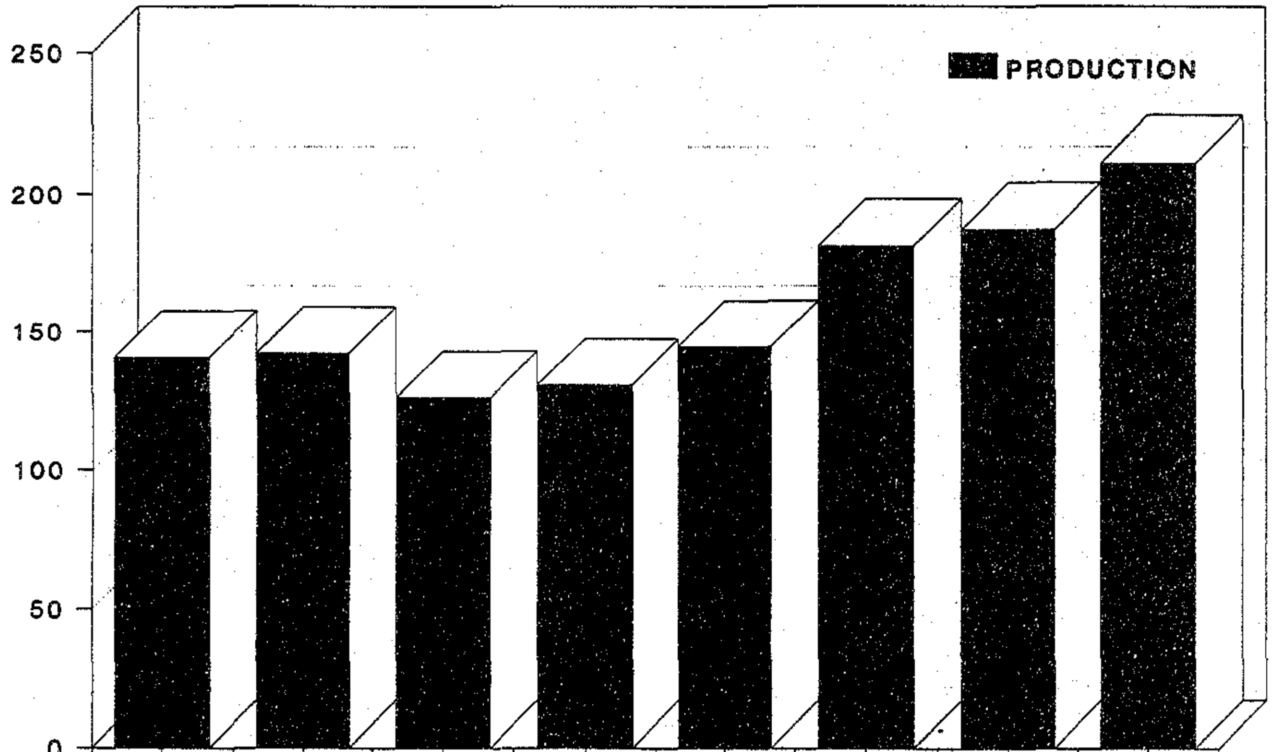
YARN PRODUCTION IN SRI LANKA.



	1986	1987	1988	1989	1990	1991	1992	1993
PRODUCTION	12.282	11.718	10.981	10.158	11.398	19.62	22.04	24.365

YEAR

FABRIC PRODUCTION IN SRI LANKA



	1986	1987	1988	1989	1990	1991	1992	1993
PRODUCTION	140.6	142.2	125.8	130.5	144.5	181.4	187.3	211.2

YEAR

Table :- II

IMPORTS (VOLUME)

ITEM	Unit	YEAR							
		1986	1987	1988	1989	1990	1991	1992	1993
1.0 FIBRE (TOTAL)	**Mn.Kg.**	**13.054**	**14.773**	**13.066**	**12.035**	**13.199**	**21.574**	**25.713**	**29.673**
1.1 Cotton	Mn.Kg.	9.288	9.983	9.564	7.789	7.487	11.935	13.754	16.382
1.2 Polyester	Mn.Kg.	1.844	2.721	2.181	2.950	3.493	3.479	6.368	7.800
1.3 Viscose	Mn.Kg.	1.575	1.950	1.035	1.127	1.929	5.951	3.693	2.653
1.4 Acrylic	Mn.Kg	0.035	0.044	0.086	0.132	0.234	0.172	0.147	0.287
1.5 Other *	Mn.Kg	0.313	0.075	0.200	0.037	0.056	0.037	1.751	2.551
2.0 YARN (TOTAL)	**Mn.Kg.**	**9.04**	**9.53**	**7.52**	**7.34**	**10.858**	**15.075**	**22.662**	**24.227**
2.1 Cotton	Mn.Kg.	2.00	2.20	1.75	1.09	3.273	6.897	7.506	10.178
2.2 Staple	Mn.Kg.	1.38	1.61	1.42	1.40	2.006	3.647	4.150	6.557
2.3 Filament	Mn.Kg.	5.34	5.52	4.22	4.77	5.434	4.449	10.374	6.968
2.4 Other *	Mn.Kg.	0.32	0.20	0.13	0.08	0.145	0.082	0.632	0.524
3.0 FABRIC (TOTAL)	**Mn.Sqm.**	**241.2**	**269.3**	**238.5**	**231.6**	**269.0**	**381.1**	**385.9**	**466.2**
3.1 Woven	Mn.Sqm.	202.3	232.5	205.6	194.8	222.1	323.6	331.8	381.6
3.2 Knitted	Mn.Sqm.	38.9	36.8	32.9	36.8	46.9	57.5	54.1	84.6

Source:-Sri Lanka Customs Dept. * - Not Classified.

IMPORT - (VALUES)

TABLE III

ITEM	UNIT	YEAR					
		1988	1989	1990	1991	1992	1993
TOTAL	MILLION RS.	11,259	13,205	17,070	25,301	34,848	44,498
FIBRE	MILLION RS.	674	756	1,055	1,878	2,156	2,272
YARN	MILLION RS.	911	1,097	1,687	3,011	3,684	4,057
FABRIC	MILLION RS.	9,104	10,689	13,824	19,388	28,056	35,841
GARMENTS	MILLION RS.	570	663	504	1,024	952	952
OTHERS	MILLION RS.	N.A.	N.A.	N.A.	N.A.	N.A.	1,376

SOURCE - SRI LANKA CUSTOMS /
MINISTRY OF HAND LOOMS & TEXTILE INDUSTRIES.

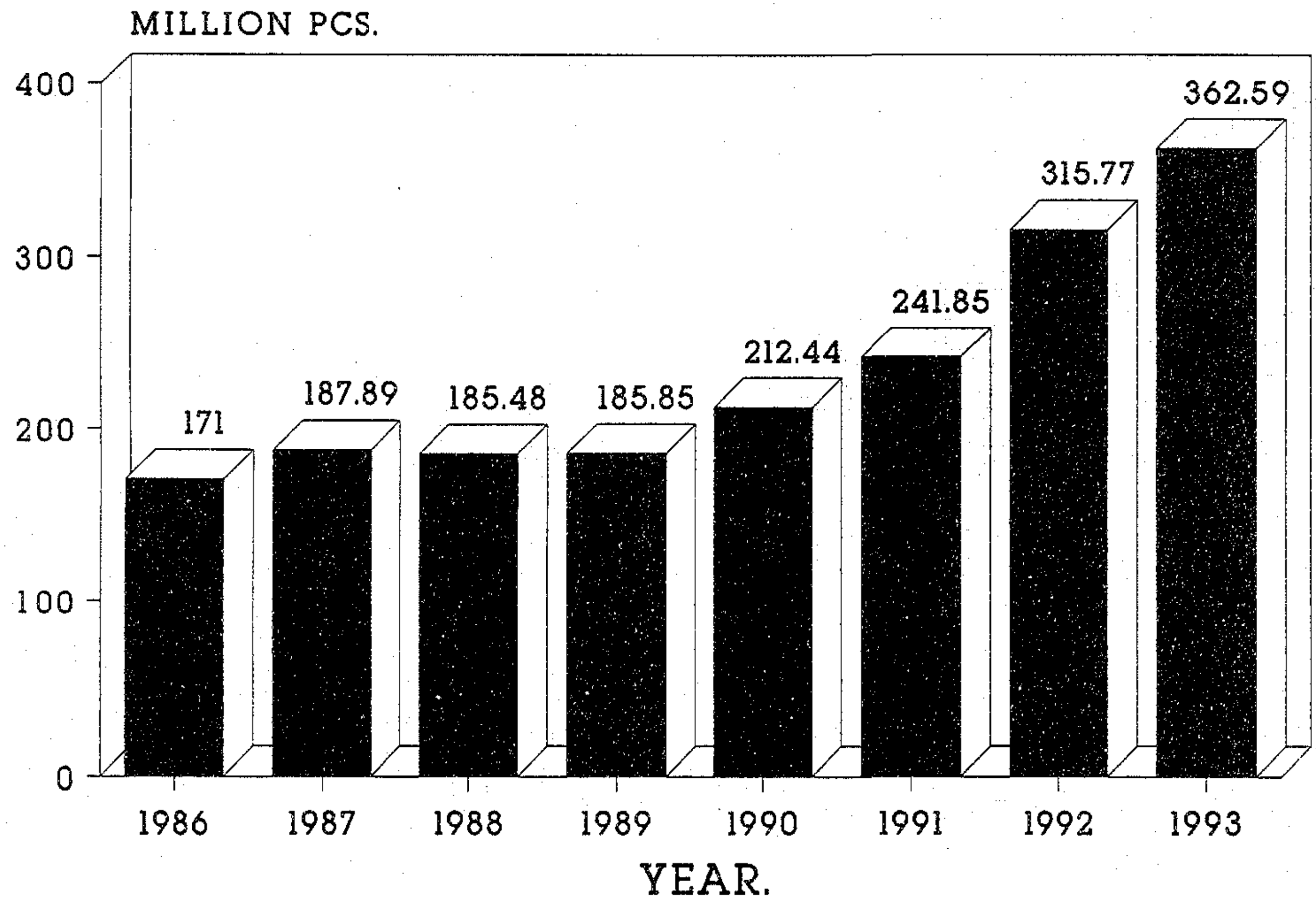
Table :- IV

EXPORT (VOLUME)

ITEM	Unit	YEAR							
		1986	1987	1988	1989	1990	1991	1992	1993
1.0 YARN (TOTAL)	**Mn.Kg.**						**1.510**	**8.524**	**12.566**
1.1 Cotton	Mn.Kg.						0.006	0.425	0.119
1.2 Filament	Mn.Kg.						0.016	0.472	0.920
1.3 Staple	Mn.Kg.			N.A.			1.228	7.627	10.984
1.4 Sewing Thread	Mn.Kg.						.259	N.A.	0.542
2.0 FABRIC (TOTAL)	**Mn.Sqm.**						**1.728**	**9.642**	**24.574**
2.1 Cotton	Mn.Sqm.						0.930	4.750	8.481
2.2 Filament	Mn.Sqm.			N.A.			0.309	0.065	0.447
2.3 Staple	Mn.Sqm.						0.490	4.827	15.644
3.0 GARMENT (TOTAL)	**Mn.Pcs.**	**171.00**	**187.89**	**185.48**	**185.85**	**212.44**	**241.85**	**315.77**	**362.59**
3.1 Woven	Mn.Pcs.	N.A.		115.51	105.66	91.11	102.89	144.49	167.36
3.2 Knitted	Mn.Pcs.			69.97	80.19	121.33	138.95	171.28	195.24

Source:-Sri Lanka Customs Dept.

GARMENT EXPORT (VOLUME.)



EXPORT - (VALUES)

TABLE V

	UNIT	YEAR							
		1986	1987	1988	1989	1990	1991	1992	1993
TOTAL	MILLION RS.	10,224	13,514	14,921	18,491	26,623	33,961	53,456	68,056
YARN	MILLION RS.	N.A.	N.A.	N.A.	N.A.	196	439	1,198	1,542
FABRIC	MILLION RS.	N.A.	N.A.	N.A.	N.A.	248	357	852	1,700
GARMENT	MILLION RS.	9,254	12,383	13,581	16,893	24,933	31,627	49,176	62,349
MADE UP	MILLION RS.	111	192	313	316	544	857	1,480	1,507
OTHER	MILLION RS.	859	939	1,027	1,282	702	681	750	958

SOURCE - SRI LANKA CUSTOMS.

EXPORT VALUES OF TEXTILE & GARMENT.
(IN MILLION RUPEES.)

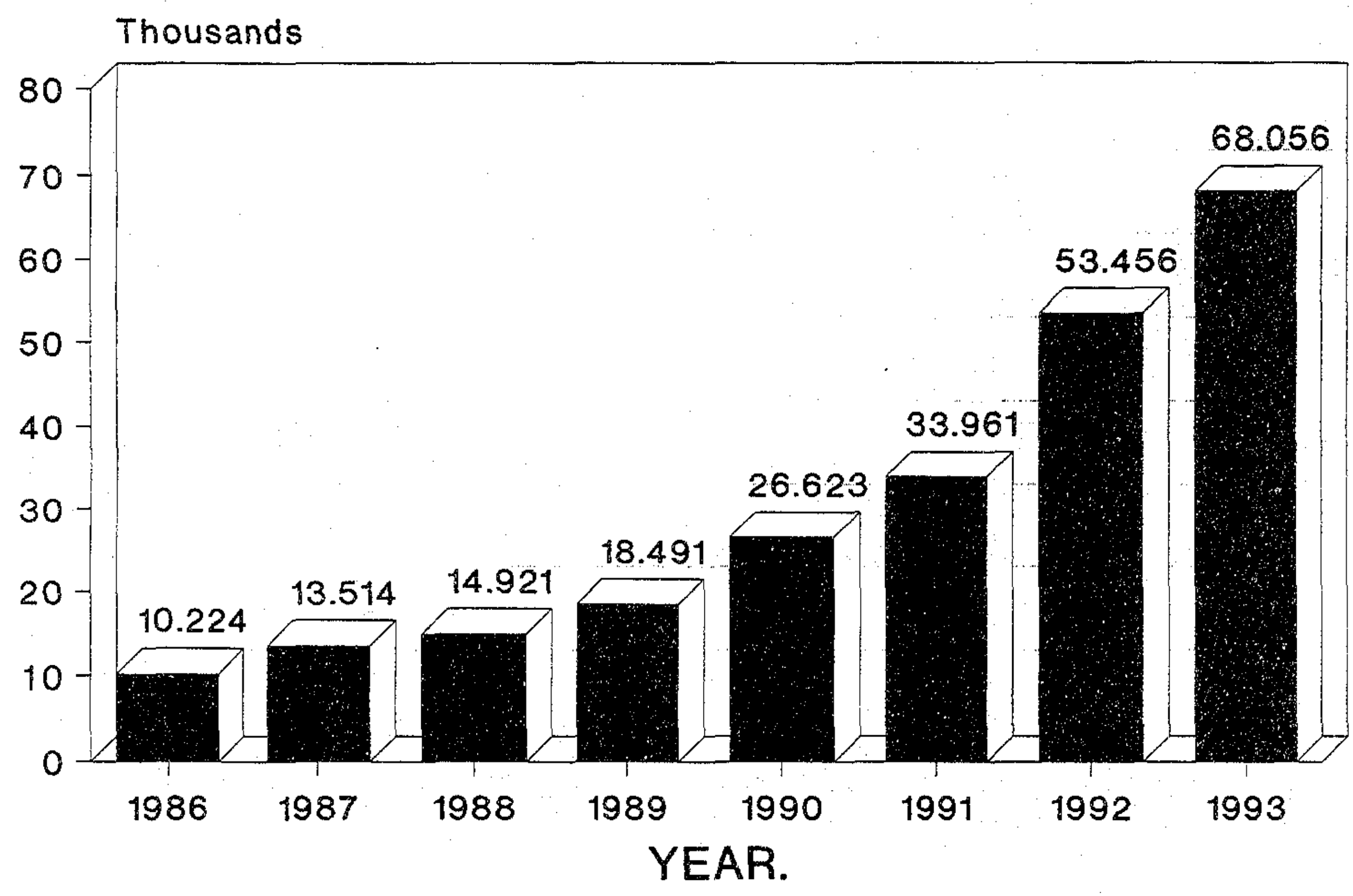


Table :- VI

Garment Export Market - Volume

(Top 15 Countries)

Year	1989		1990		1991		1992		1993	
Export Volume(Mill.Pcs.)	186		212		242		316		363	
Country	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%
U.S.A	1	57.4	1	58.82	1	51.52	1	52.25	1	54.28
Germany			2	14.51	2	17.36	2	16.83	2	15.32
France			3	5.06	3	7.21	4	6.48	4	5.09
United Kingdom			4	4.12	4	6.22	3	8.22	3	9.91
Netherlands			5	4.08	5	3.81	5	4.01	5	4.27
Japan			6	3.01	8	2.03	10	1.05	9	0.93
Belgium			7	2.88	6	3.15	6	3.17	6	3.73
Canada	N.A.	N.A.	8	2.24	7	2.14	7	2.07	7	1.70
Italy			9	1.56	10	1.41	8	1.41	8	1.22
Malaysia			10	0.70	9	1.59	9	1.06	10	0.69
Sweden			11	0.55	11	0.64	15	0.33	12	0.29
Switzerland			12	0.34	13	0.35	12	0.36	11	0.34
Denmark			13	0.34	14	0.32	13	0.35	14	0.28
Austria			14	0.24	12	0.41	11	0.49	13	0.28
Norway			15	0.23	15	0.31	14	0.35	15	0.25

Source :-Sri Lanka Customs

Table :- VII

Garment Export Market - Value
(Top 15 Countries)

Year	1989		1990		1991		1992		1993	
Export Value (Million Rs.)	16,893		24,933		31,627		49,176		62,349	
Country	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%
U.S.A	1	68.9	1	66.41	1	60.09	1	60.02	1	63.08
Germany			2	9.73	2	11.32	2	11.55	2	10.51
United Kingdom		N.A.	3	6.05	3	8.27	3	9.13	3	9.41
France			4	3.82	4	5.60	4	5.09	4	4.22
Netherlands			5	3.46	5	3.54	5	3.49	5	3.88
Canada		2.5	6	2.74	6	2.45	6	1.97	7	1.45
Italy		N.A.	7	1.85	7	1.47	7	1.54	8	1.03
Japan		1.3	8	1.05	8	1.33	9	1.08	9	0.76
Belgium	N.A.		9	0.87	10	0.98	8	1.27	6	1.54
Sweden		N.A.	10	0.79	9	1.10	10	1.05	10	0.64
Switzerland			11	0.69	11	0.63	13	0.48	11	0.58
Denmark			12	0.47	12	0.48	14	0.37	14	0.30
Norway		0.3	13	0.38	13	0.48	-	-	15	0.24
Ireland			14	0.32	-	-	-	-	-	-
Australia			15	0.21	-	-	-	-	-	-
Spain		N.A.			14	0.43	15	0.36	-	-
Austria					15	0.32	12	0.53	13	0.41
South Korea							11	0.62	12	0.56

Source :-Sri Lanka Customs

Table :-VIII

INSTALLED MACHINES - 1993

1.0 Spinning	
1.1 Ring Spindles	285,000
1.2 Rotors	N.A.
2.0 Weaving	
2.1 Shuttle Looms	12,700
2.2 Shuttle Less Looms	500
3.0 Knitting	
3.1 Circular Knitting	455
3.2 Flat Knitting (Manual)	6,000
3.3 Flat Knitting (Motor Operated)	150
3.4 Warp Knitting	70
3.5 Hosiery	3,000
4.0 Garment	
4.1 Sewing Machines	128,680
5.0 Other	
5.1 Label Looms	57 *

Source:-Ministry Of Handlomms & Textile Industries/TTSC
* - Only For Reported Units in 1992.

Table :- IX

TEXTILE MACHINERY INVESMENTS

Unit. Rs.Million

ITEM	YEAR						
	1980	1985	1988	1990	1991	1992	1993
1.0 YARN	**80.135**	**1.687**	**10.859**	**134.823**	**139.383**	**446.597**	**300.064**
1.1 Extruding	22.330	N.A.	0.517	9.748	40.858	37.686	25.186
1.2 Preperatory	0.122	0.499	5.125	43.136	33.373	107.755	39.839
1.3 Spinning/Twisting	57.683	1.188	5.217	81.939	65.152	301.156	235.039
2.0 FABRIC	**148.380**	**60.707**	**56.164**	**158.136**	**302.035**	**463.978**	**766.019**
2.1 Weaving	108.299	13.130	22.638	70.799	81.442	151.106	365.238
2.2 Knitting	20.389	33.258	8.812	55.550	213.551	261.007	371.849
2.3 Other	19.692	14.319	24.714	31.787	7.042	51.865	28.932
3.0 PROCESSING	**69.559**	**38.024**	**94.779**	**77.588**	**172.753**	**333.519**	**528.210**
3.1 Finishing	69.559	38.024	94.779	77.588	172.753	218.355	346.729
3.2 Packing	N.A.	N.A.	N.A.	N.A.	N.A.	115.164	181.481
4.0 GARMENTS	**66.153**	**105.096**	**160.740**	**221.299**	**558.088**	**1226.587**	**1038.586**
4.1 Sewing Machines	66.153	105.096	160.740	221.299	558.088	1226.587	1038.586

Source:-Sri Lanka Customs Dept./Textile training & Service Centre

Table :- X

EMPLOYMENT - 1993

Activity	No.Of Reporting Units.	Employees (Estimated)
1.0 Textile Manufacturing Sector		
1.1 Spinning	06	1,833
1.2 Knitting	28	922
1.3 Weaving		
1.31 Small Scale (< 100 Looms)	50	6,065
1.32 Medium Scale (100 - 500 Looms)	19	10,605
1.33 Co-Op. Power Loom Sector	14	2,130
1.4 Integrated Mills	03	8,037
1.5 Finishing Units	21	1,500 *
S.Total	**141**	**31,092**
2.0 Apparel Sector		
2.1 Small (< 100 Machines)	230	23,263
2.2 Medium (100 - 250 Machines)	276	97,832
2.3 Large (Above 250 Machines)	143	113,510
S.Total	**649**	**234,605**
3.0 Allied Industrial Sector		
3.1 Sewing Thread	03	461 # *
3.2 Label	07	337 # *
3.3 Elastic	03	170 # *
S.Total	**13**	**968 # ***

Source :- Ministry Of Handlooms & Textile Industries. * - Only For Reported Units. # - For 1992

TABLE XI

PRICE INDICES.

COLOMBO CONSUMER'S PRICE INDEX (ANNUAL AVERAGES.)

ITEM	YEAR							
	1986	1987	1988	1989	1990	1991	1992	1993
ALL ITEMS	606.0	652.8	744.1	830.2	1,008.6	1,131.5	1,260.4	1,408.4
CLOTHING	374.5	400.9	419.8	490.0	610.2	678.4	723.6	782.7

* BASE YEAR - 1952 = 100

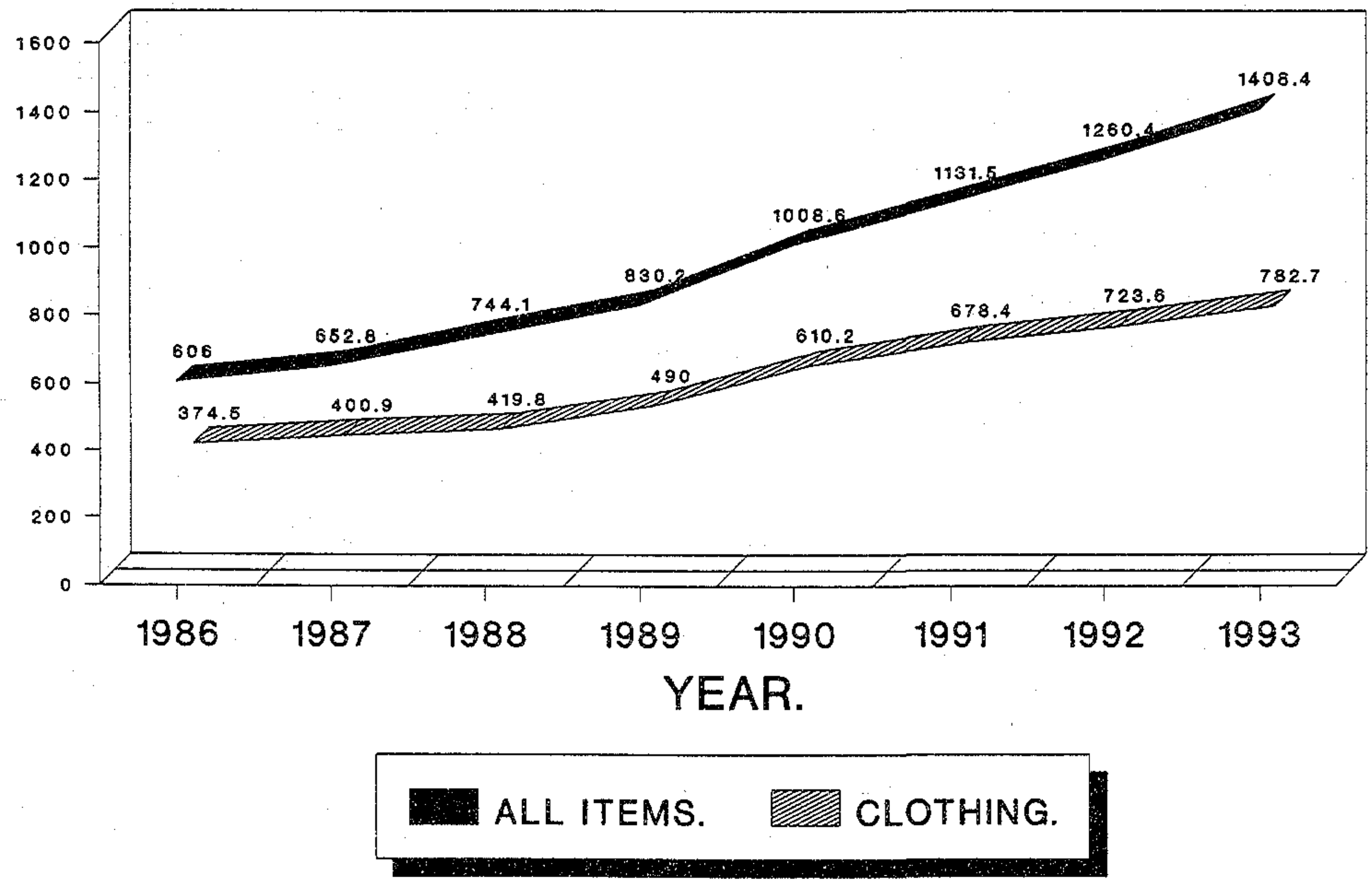
GREATER COLOMBO CONSUMER'S PRICE INDEX. (ANNUAL AVERAGES.)

ITEM	YEAR				
	1989	1990	1991	1992	1993
ALL ITEMS	100.0	124.6	138.9	152.0	164.8
CLOTHING & FOOT WEAR.	100.0	140.9	168.2	175.8	190.3

* BASE YEAR - 1989 = 100

SOURCE - DEPT. OF CENSUS & STATISTICS.

COLOMBO CONSUMER'S PRICE INDEX.
(ANNUAL AVERAGES.)



IMPORT & EXPORT VALUES.

TABLE XII

ITEM	UNIT	YEAR					
		1988	1989	1990	1991	1992	1993
1.0 IMPORTS							
1.1 NATIONAL	MIILLION RS.	70,320	75,353	105,559	127,831	149,780	181,381
1.2 TEXTILE	" "	11,259	13,205	17,070	25,301	34,848	44,498
2.0 EXPORTS							
2.1 NATIONAL	MIILLION RS.	47,092	55,511	76,624	82,225	107,509	137,994
2.2 INDUSTRIAL	" "	22,674	28,469	41,510	50,736	76,699	100,420
2.3 TEXTILE	" "	14,921	18,491	26,623	33,961	53,456	68,056
3.0 PERCENTAGE (EXPORTS)							
3.1 TEXTILE/NATIONAL	%	31.68	33.31	34.74	41.30	49.72	49.32
3.2 TEXTILE/INDUSTRIAL	%	65.81	64.95	64.14	66.94	69.70	67.77

SOURCE - SRI LANKA CUSTOMS / CENTRAL BANK.

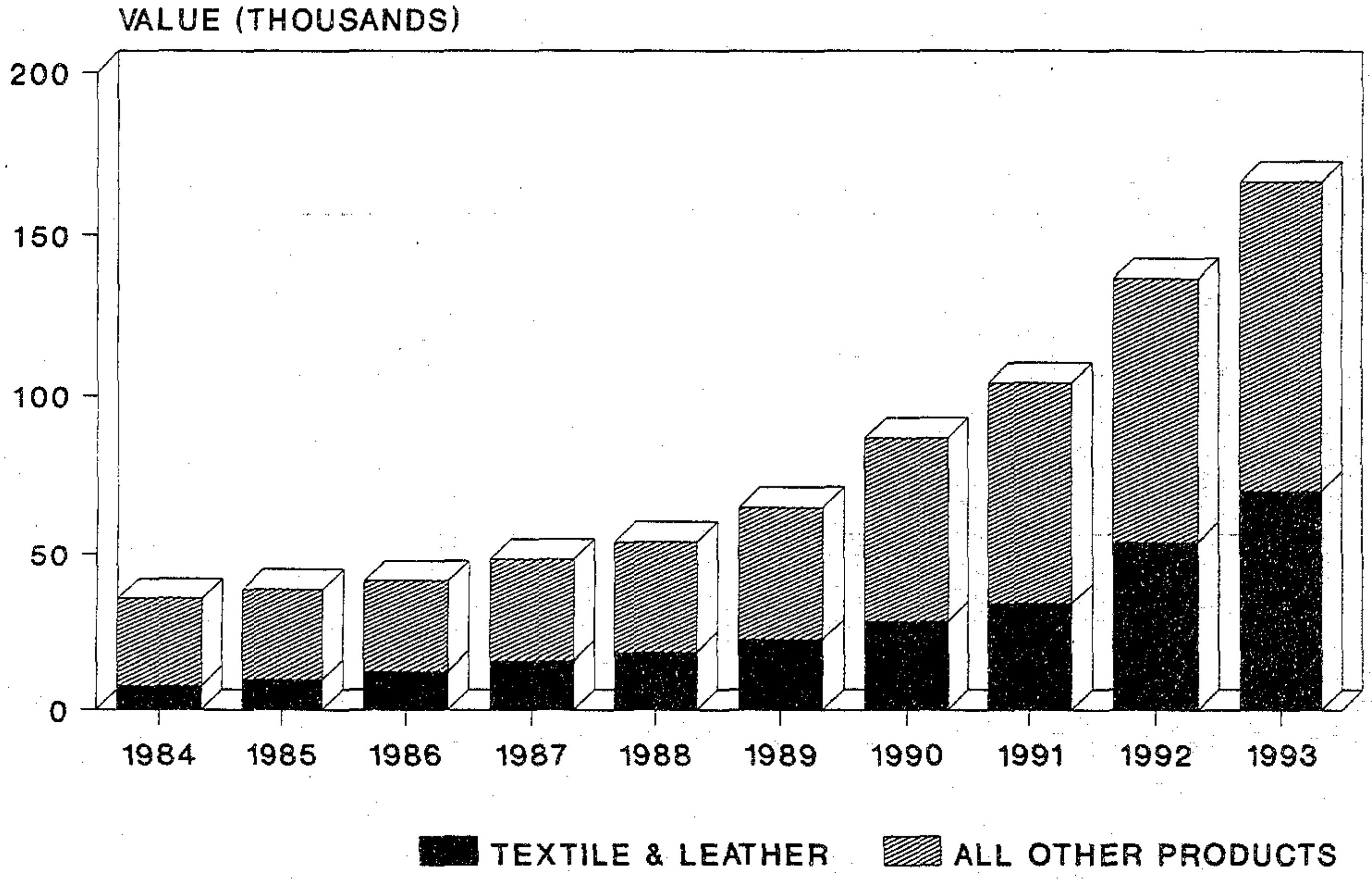
Table xiii

SOCIO-ECONOMIC DATA (SRI LANKA)

	UNIT	1988	1989	1990	1991	1992	1993
DEMOGRAPHY							
Population (Mid Year)	Mn.	16.586	16.806	16.993	17.247	17.405	17.619
Age Group 0 - 14	-do-	5.850	5.917	5.982	6.070	6.126	6.203
15 - 54	-do-	9.163	9.299	9.403	9.545	9.633	9.751
55 & Over	-do-	1.573	1.590	1.608	1.632	1.646	1.665
Growth Rate	%	1.4	1.3	1.1	1.5	0.9	1.2
NATIONAL PRODUCT							
GDP Growth Rate	%	2.7	2.3	6.2	4.8	4.3	6.9
Per Capita GNP(Current Price)	Rs.	11953	13293	16702	19017	21786	25389
	US$	375	369	417	460	497	526
INDUSTRIAL PRODUCTION							
Value Of Total Production	Rs.Mn	54063	64907	86756	103924	136106	166466
Textile & Leather	-do-	18166	22073	27930	33854	53929	70057
Ratio	%	33.6	34.0	32.2	32.6	39.6	42.1
EXCHANGE RATE							
US$ (At Year End)	Rs.	33.03	40.00	40.24	42.58	46.00	49.56

Source:-Central Bank/Customs Dept./Dept.Of Census & Statistics
Textiles- HS 50 - 63

VALUE OF INDUSTRIAL PRODUCTION.
(IN MILLION RUPEES)



PROJECTED FABRIC REQUIREMENT (in Mn. mtrs.)

SUPPLIES	Year 1992	Year 1993	Year 1994	Year 1995	Year 2000
Domestic Consumption	210	215	220	226	256
Indirect Exports (Garments)	394	452	520	598	1203
Direct Eorports	11	20	30	35	100
Total Requirements	615	687	770	859	1559
Domestic Production	198	215	227	234	260
Estimated Imports	417	472	543	625	1299

Notes ;
Domestic Consumption - Growth rate of 2.5%
Indirect Exports - Growth rate of 15%
Direct Exports - On present investments and projected expansions
Domestic Production - On existing capacities with marginal increases
Estimated Imports - Met by recorded and unrecorded impotrs

GOVERNMENT OF SRI LANKA
MINISTRY OF HANDLOOMS AND TEXTILE INDUSTRIES

STATEMENT OF POLICY

(Approved by the Cabinet of Ministers November 1993)

MINISTRY OF HANDLOOMS AND TEXTILE INDUSTRIES
'Vilasitha Nivasa'
375, Havelock Road,
Colombo 6.

CONTENTS

FOREWORD

Textiles play an important role in meeting one of man's needs besides food and shelter. All Governments endeavour to ensure that this primary need is met either utilising its own manufacturing resources or through exchange of goods and services. The textile industry (encompassing textile and garments) is usually the first industry encouraged by Governments and is the foremost contributor to manufacturing output, employment and foreign exchange as well.

In Sri Lanka the industry occupies a prominent position and is geared to lead the nation into the status of a newly industrialised country. With this important role and the liberalisation of the economy the need for a unified textile policy has risen. Until now it has been guided mostly through exigencies of situation. Government interventions have been influenced by interested pressure groups rather than on a clear and consistent planning for development of the industry. A long range development plan for this industry is needed to set out a clear and consistent set of policies to reduce uncertainty and harmonise the effort of various concerned Government Agencies.

The structure of the industry is characterised by a few large units, a substantial number of small and medium sized firms and a multitude of individual family concerns. The technology adopted ranges from the traditional systems to the modern. The industry also faces growing internationalisation of production, the restrictive effects of the Multi Fibre Arrangement and formidable international competition. These have led to many structural weaknesses requiring restructuring of the industry in line with changing dynamics of comparative advantage.

This document aims at a balanced growth of the different sub-sectors with a view to meeting set goals for the identified sub-sector. These have been arrived at having given consideration to the strengths and advantages of these sectors. Policy formulation and planning are difficult due to lack of adequately accurate and up to date data about the status and performance of the industry.

Policy statements without sufficient operational directions and absence of organisations in charge of implementing, monitoring and adjustments have very often not been successful. This Policy document aims to avoid these pitfalls by setting operational goals and structural responsibilities through Nodal agencies.

U B Wijekoon
MINISTER OF HANDLOOMS AND TEXTILE INDUSTRIES
Colombo,

STATEMENT OF POLICY

1.0 INTRODUCTION

The Textile Industry Policy package forms part of a national industrialisation strategy to begin the process of reaching the status of a Newly Industrialised Country. The industrial policy aims to achieve country-wide industrial development starting with the rural and urban base to reach the goal of export and competitive import substitution.

Among the objectives of the industrialisation strategy are,

a) to transfer the primarily domestic market oriented industry to an export oriented one.

b) to provide greater employment and income opportunity to a growing population.

The textile industry in Sri Lanka encompassing the fabric and apparel manufacturing sectors have experienced varying degrees of success over the last 3 decades. It has witnessed periods of growth and stagnation. Its fortunes were heavily influenced by the economic policies of the Government and the resources made available to it. Despite these difficulties the textile sector has shown great resilience and is now the dominant exporter having overtaken the traditional tea exports since 1986 as the top exporter of the country. It contributes over 65% of the industrial exports, largely through apparel exports.

The industry which developed around the fabric manufacturing sector to satisfy the internal market requirement has now moved into apparel exports providing employment and bringing in substantial foreign exchange earnings. The textile policy objectives of the 60s and 70s were geared to the development of a self-sufficient import substitution industry capable of generating employment and conserving foreign exchange. This was largely achieved through a highly regulated textile industry dominated by public sector investments together with identified areas of activity made available to the private sector.

The 80s had witnessed a shift from self sufficiency to export orientation with the private sector acting as the engine of growth. This has shifted emphasis on the public sector having a minimal role in the production and distribution of textiles but acting as a catalyst in the promotion and growth of the industry.

2.0 OBJECTIVES & STRATEGY

The policy objectives identified, while fulfilling the national industrialisation objectives must also take cognisance of the global environment in which the industry operates. In the global environment the textile industry operates within the frame work of the Multi Fibre Arrangement (MFA). While the MFA may have assisted apparel exports, it has inhibited product development and marketing through the provision of limited but assured market access. The eventual integration of MFA within the GATT frame work, while opening market opportunities would also give rise to competition from similar exporting countries. With the potential for further growth being evident and its ability to lead the industrialisation strategy of the country recognised, **Textile sector will be given due pride of place as country's lead sector in the industrialisation programme.**

The objectives identified in the development strategy in the textile sector are to,

a) ensure that textile and clothing are available to the people of the country in adequate quantity and of acceptable quality at internationally competitive prices.

b) improve its foreign exchange earning capability.

c) develop the sector so as to increase employment creation opportunities.

d) develop a technologically healthy internationally competitive textile industry.

The development strategy adapted to achieve these objectives is based on sectorial growth combined with the development of identified technological process. The sectors identified for growth in the strategy are,

1) The apparel sector
2) Large mill sector
3) Small and medium fabric manufacturing and processing sectors
4) Handloom sector
5) Allied industries sector

The technological processes identified for immediate consideration are,

i) The industrial sewing and finishing process of the apparel sector.

ii) The fabric processing or conversion of grey fabric to finished fabric.

iii) The weaving and knitting process or conversion of yarn to fabrics.

The potential for the development of a raw material base is recognised but in the present context it is not given priority.

2.1 Apparel Sector

The apparel sector is the flag bearer of the country's industrial exports and will continue to be so in the years to follow. Expansion has been primarily due to better utilisation of quotas, quality improvement and growth in non quota exports. Within the proposed framework of the phasing out of the MFA, Sri Lanka will continue to have the benefits of the quota system. With the degree of liberalisation in the importing countries the trading environment would be more competitive.

The objectives identified in the development of the apparel sector are to,

a) develop the foreign exchange earning capacity through exports of garments.

b) create employment opportunities to the people of the country.

c) ensure that the growing garment needs of the people of the country are available in adequate quantity and quality at internationally competitive prices.

The strategies to be adopted in achieving these objectives are,

i) Encourage and assist entry to overseas market

ii) Encourage the manufacture of new export product

iii) Encourage the sector to move up market in established overseas market

iv) Increase the value addition in the sector by the use of locally produced inputs such as fabrics and accessories

v) Assist and encourage the garment sector to improve its manufacturing facilities.

The apparel sector which presently has an estimated capacity of 85,000 machines will witness a substantial increase by around 100,000 machines providing additional direct employment to over 200,000. Exports are expected to reach over 500 million pieces bringing in export earning of over Rs. 80 billion by the year 1996 and increasing the value addition in the sector to over 40%.

2.2. Large Mill Sector

This sector is identified as having the organisational and production capabilities to meet export requirement in value and quality. It provides favourable opportunities of development to meet policy objectives,

a) ensure that textiles are available to meet the needs of the country in adequate quantity and acceptable quality at internationally competitive prices.

b) *increase the foreign exchange earning capability.*

c) develop a technologically healthy internationally competitive textile industry.

In achieving these objectives the development strategy will be to,

i) Encourage new investors into large scale textile processing, weaving and knitting projects.

ii) Identify existing large scale units for assistance to modernise and exploit the export potential.

iii) As this sector is capital intensive a special package of investment incentives will be offered.

This sector will be assisted to introduce new technologies so as to enable the development of a technologically healthy industry.

The policy package will be aimed at increasing the processing capacity by further 150 mill meters, and the weaving and knitting capacity by 100 mill metres which combined would realise an export target of 100 mill metres of finished fabrics.

2.3 Small and Medium Scale Sector

The Small and medium scale sector involved in textile manufacture, is an effective means of diffusing technology to rural areas and developing of entrepreneurs. This sector is to be developed so as to fill the market vacuum created by the diversion of the larger units to exports. In the development of this sector the objectives to be achieved are,

a) make substantial contribution to ensure that textiles are available to the people of the country in adequate quantity and of acceptable quality at internationally competitive prices.

b) increase the employment opportunities.

In achieving these objectives the strategy adapted would be,

i) Offer extension services covering project preparation start up and know how to small investors.

ii) Encourage this sector to work in liaison with the large mill sector as feeder units.

iii) Offer an attractive financial package of incentives to small and medium sector.

It is expected that in the short term of 5 years, additional capacities for production of 100 mill metres of fabric would be installed.

2.4 Handloom Sector

The estimated number of active handlooms in the country is around 25000 providing employment to about 35,000. The industry caters primarily to the local market with exports being negligible. In sustaining the existing level of operation this sector will be so geared as to,

a) contribute its share in ensuring that textiles and clothing are available to the people of the country in adequate quantity and of acceptable quality at internationally competitive prices.

b) increase foreign exchange earning capability.

In keeping with the overall development strategy the handloom sector will be allowed to develop on its own competitive strength. The strategy adopted in achieving objectives will be,

i) Provision of institutional support in supplies and marketing.

ii) Provide assistance in improving the skills of those engaged in the sector through training and enhancing their know-how.

iii) Improve the productivity through the use of appropriate equipment and tools.

iv) Develop and expand the weaving of silk fabrics and production of high value items.

v) Transfer State owned production centres to the private sector.

Within the next 3 years the handloom sector will be expected to improve its present output from 15 million metres to 25 million metres catering mainly to the domestic market and also achieving an export target of Rs. 50 million.

2.5 Allied Industries Sector

The textile and apparel manufacturing sectors are heavily dependent on a number of ancillaries and auxiliaries. This gives rise to opportunities for the creation of an allied industrial sector.

The yarn & fabric manufacturing sectors require for its efficient operation the inputs of spares and accessories. They are mainly wood, leather, rubber, plastic or metal based besides chemical auxiliaries like starch, bleaching agents, dyes & pigments, etc.

The apparel sector is dependent on the supply of accessories such as sewing thread, buttons, labels, zips, elastic etc.

The existence of a strong textile and apparel base generates a number of feeder industries and crafts. This extends from direct supplies to the Apparel Sector, Large Mill Sector, the Small and Medium Sector and direct sale to the individual consumer in the form of Batiks and Lace.

The objectives identified in the development of this sector are,

a) improve the foreign exchange earning/saving capability.

b) increase employment creation.

The healthy growth of this sector is dependent on the health of the larger textile and apparel sector and are interdependent.

3.0 TECHNOLOGY STRATEGY

A major weakness in the industry is the technology gap for it to be internationally competitive. Introduction of new technology combined with necessary management skills will assist the industry to achieve its objective of developing a technologically healthy industry.

In achieving this objective the technology strategy of the different sectors will be,

i) Improvement in productivity and quality levels in the apparel sector.

ii) Introduction of product specialisation at factory levels in the apparel sector.

iii) To ensure that technology adopted in fabric processing meet the requirement of a sustainable environment.

iv) To encourage and assist the weaving units to introduce broad width shuttleless looms.

v) To encourage the knitting units to use high speed multi feed machines.

vi) In the introduction of new technologies, import of used machinery will not be discouraged but stipulation regarding the age of equipment to be imported will be introduced.

vii) Information on available new technologies will be made available to the industry through the development of a Technology Information Centre.

4.0 MANPOWER DEVELOPMENT

Adequately trained and skilled manpower is a primary requirement of industrial growth. Investment in capital equipment together with parallel investment in manpower development are required to achieve the objective of developing a technologically healthy internationally competitive textile industry.

The envisaged growth in the industry would require a substantially large number extending from the operator level to senior management covering the various disciplines of the textile sector. In order to achieve this requirement the strategies to be adopted are

i) Encourage the establishment of decentralised private sector training units catering to the needs of the apparel sector.

ii) Encourage and assist the large manufacturers in the fabric and apparel sector to set up their own internal training units.

iii) Co-ordinate the outputs of the educational and training institutes to ensure that adequate professional technologists are developed to meet the requirements of the industry.

iv) Necessary measures will be taken to ensure that priority is given to employment of local personnel. Where such expertise is not available time limits for the employment of expatriate staff will be introduced.

v) Specialised training for senior management will be made available through overseas assistance programmes or through company funded programmes enjoying tax benefits.

5.0 MARKET AND EXPORT PROMOTION

The environment for world trade in apparel and textile products is becoming more competitive through new entrants to international market from emerging low cost suppliers and from producers in developed countries who have improved their competitiveness of their products through introduction of cost saving new technologies. Realising the objectives of the textile industry would require a sustained market development programme to achieve growth and create market opportunities for the considerable expansion in production capacities that is anticipated. Against the competitive international market a multi-pronged marketing strategy to achieve an expansion in the trade in garments and textile products will be launched.

The strategy in this marketing effort will cover,

i) New markets to be targetted such as Japan, Switzerland, Austria, Sweden, Australia and Eastern Europe.

ii) Identification of new product lines to manufacture such as luggage accessories, soft toys, home textiles, foundation garments etc.

iii) Product adaptation targetted to meet the up-market requirements of specific market/market segments.

It is anticipated that at the end of the 3 year period an export target of over Rs. 80 billion would be achieved.

6.0 INVESTMENT INCENTIVES

Incentives will be announced from time to time.

7.0 INSTITUTIONAL FRAMEWORK

The strategies identified for implementation in the different sectors require interaction with a number of ministries and specialised agencies. The task to be accomplished will need effective coordination, monitoring and assistance at the producer level. This will be accomplished by restructuring and strengthening the Ministry.

The development programmes identified for implementation will be supported by additional funding out side the normal budgetary source available to the Ministry. This will be achieved through the creation of a 'Textile Development Fund' (TDF).

This will draw its resources through,

- the levy of a cess on the textile industry.
- the levy of a documentation service charge.
- overseas assistance programmes.
- contribution by the Industry.

The establishment of the TDF and other regulatory measures that may be required will be effected through a 'Textile Development Act', granting the Ministry the necessary legal authority.

資料5　スリランカの繊維産業（論文）ＴＴ＆ＳＣマーケッティング担当A. H. H. SAHEED氏著
（テキスタイル・インポート・ニュース94年8月）

TEXTILES AND APPARELS

1. INTRODUCTION

The Textile and Garment Sector today dominates the Industrial Sector of Sri Lanka. This sector continued to demonstrate its Vitality and Growth despite Import restriction imposed by some importing countries. Sri Lanka has gained a world-wide reputation as a reliable supplier of quality garments. From the Mid 1980's, the garment Industry established itself as Sri Lanka's front-line export Industry and foreign exchange earner and has maintained its position ever-since.

The country's highly productive work force is its greatest asset in relation to the labour intensive garment industry. Workers are quick to master New Skills - Literacy rate is 86%. Low costs of Production, high quality and an unmatched geographic location make Sri Lanka the ideal base for the garment and textile Industry.

2. GROWTH IN THE GARMENT INDUSTRY

Sri Lanka has experienced a phenomenal growth in the garment Industry. This growth has been the result of an aggressive government policy towards expansion of this sector. The main factors contributing to the success are attractive incentives, tax concessions, Low cost and literate labour and export quotas which provide assured market share. However Sri Lanka's share in world trade is only around 1%. The number of exporting garment factories has doubled from 350 in 1989 to 700 in 1993.

The vibrant growth of the Export Garment Industry are demonstrated below.

Year	Export Mn. Pcs	Growth %	Export Value US $ Mn.	Growth %	Avg. Unit Price US $
1989	185	-	469	10	2.54
1990	212	15	623	33	2.93
1991	242	14	764	23	3.16
1992	315	31	1122	47	3.56
1993	362	15	1289	15	3.56

Furthermore, the maturity of the garment Industry is highlighted by the fact that more high value garments are produced in Sri Lanka. This is reflected in the significant increase in the average unit price of garments from US $ 2.54 per garment in 1989 to US $ 3.56 per garment in 1993 and increase of 40%.

Sri Lanka garments are supplied to many internationally renowned buying houses, under well known brand and designer labels - a few being

Calvin Klein	Adidas
Liz Clairborne	Van Heusen
Mothercare	Arrow
St. Michaels	Pierre Cardin
C & A	Crocodille
Levis	Manhatton

The growth in export value of the garment industry has been tremendous from 469 Mn. US $ in 1989 to 1,289 Mn. US $ in 1993 an increase of 175 %. It continues to be the Major export sector for Sri Lanka. It is expected that this growth will continue to 3500 Mn. US $ in year 2000, an annual growth of 15%.

Although Sri Lanka garment exports have entered many International Market but bulk of the garments are exported to U.S.A and E.E.C.

The breakdown of Garment Exports of 1993 to Major Markets.

Market	Qty. Mn. Pcs.	Value US $ Mn.
U.S.A	196.8	813.23
E.E.C	145.8	404.99
Canada	6.2	18.79
Japan	3.4	9.84
Sweden	1.0	8.25
Norway	0.9	3.20
Others	8.5	30.70
Total	362.6	1289.00

3. POTENTIAL FOR TEXTILE INDUSTRY

Although the garment sector continued to expand its exports and maintain its position as No. 1, Exporter, since mid 1980's, however there has been no parallel growth in the fabric manufacturing sector and today it is estimated that 95% of the fabric consumed by the export garment sector are imported, because the Sri Lankan textile Industry is unable to supply in required widths, guantities and quality.

The fabric imports during the years 1989 to 1993 are as follows:

Year	Knitted Qty. Mn.Sq.Mtrs.	Woven Qty. Mn.Sq.Mtrs.	Total Qty. Mn.Sq.Mtrs.
1989	194	37	231
1990	222	47	269
1991	323	58	381
1992	331	68	400
1993	353	90	443

The popular type of fabric imported in large volume are,

Cotton - Sheeting, Twill, Poplin, Denim

Filament - Nylon Tafetta

Synthetic Staple - Polyester/Cotton Shirting/Poplin, Rayon - Sheeting and Dress Material

Fabric construction of Major Imported Woven Fabric.

Type of Fabric	Width	Constructions	Count of Yarn	Constructions Fabric
Sheeting	60"/45"	100% Cotton	20^s x 20^s	60 x 60
			30^s x 30^s	68 x 68
Twill	45"	100% Cotton	20^s x 20^s	108 x 58
			21^s x 21^s	108 x 58
Poplin	45"	100% Cotton	40^s x 40^s	133 x 72
			40^s x 40^s	100 x 70
Denim	58"/60"	100% Cotton	10^s x 7^s	80 x 46
			7^s x 7^s	72 x 42
Shirting/Poplin	45"	P/c-(65/35)	45^s x 45^s	110 x 76
			45^s x 45^s	136 x 72
Sheeting/Dress Material	45"	100% Rayon	20^s x 20^s	60 x 60
			30^s x 30^s	68 x 68
Nylon Tafetta 190T & 210 T	60"	100% Nylon	70D x 70D	114 x 96
				104 x 86

Foreign Investment

Foreign Investment has increased in this sector since 1989 and B.O.I has approved several textile projects. However it is clear that substantial additional capacity will be required to meet the growing demand of the export garment Industry.

It is projected that by the year 2000 total consumption of fabric (on the basis of 80% woven 20% knitted) in Sri Lanka will be 1450 Mn.Sq.Mtrs. of which 1200 Mn.Sq.Metrs will be required by the export garment Industry.

Some of the Foreign Investors include companies such as-

- Kabool
- Arvind Mills
- Daegu Textiles
- Chung-Won
- South Textiles
- Australian ADC
- Australian MGT

4. A COMPETITIVE AND SKILL-FULL LABOUR FORCE

Sri Lanka has several well recognised textile institutes which provide well qualified graduates, technicians, operators. Total annual output of all Universities and Institutes is 2,467. The curricular for these courses are set up in consultation with the private sector. During the training students gain practical experience through assignments in textile factories for one to twelve months.

Sri Lanka textile wage rate (0.39 US $/year in 1993) is positioned 52nd out of 58 countries as identified by Werner International.

5. FACILITIES

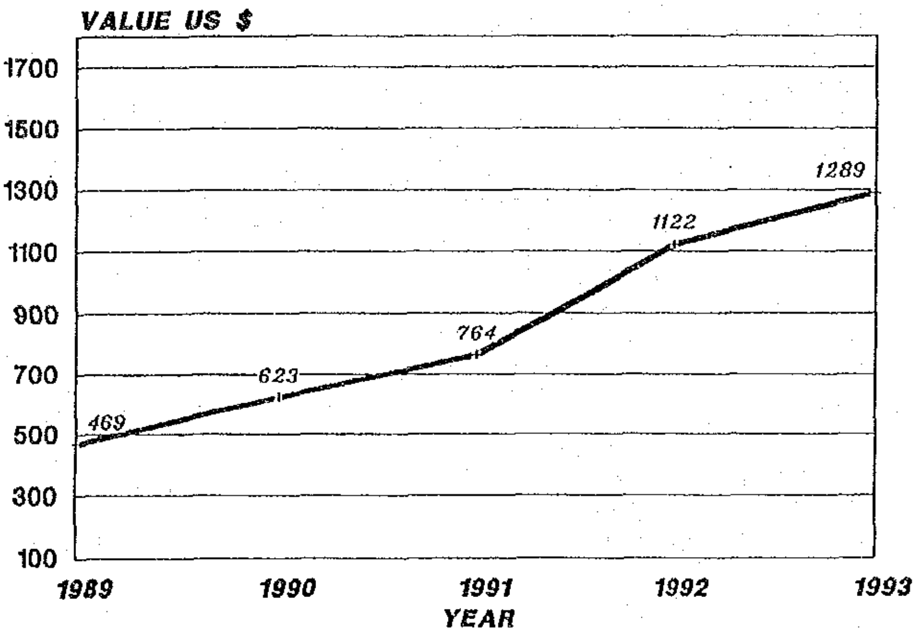
Sri Lanka offers suitable infrastructure such as reliable power supply, good road network, satisfactory telecommunication system. Internationally reputed Sea and Airports. Furthermore, Sri Lanka has several textile training and services centres which provides, beside training to the textile staff also various technical and managerial services. Such as consultancy services physical and chemical testing analysis on fibres, yarn, fabrics and garments yarn count, twist, colour fastness, shrinkage, fibre consumption etc.

5 Incentives

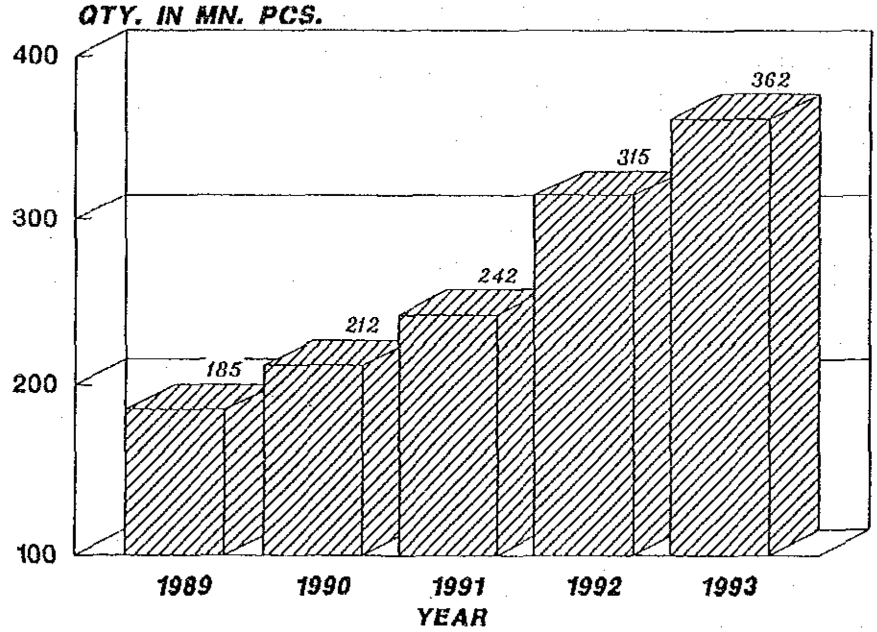
The following incentives are granted to manufacturers of textiles who supply textile to the export garments industry as well as sell directly export

Incentives/Concessions	Period
Corporate Income Tax at concessionary rate of 15% per annum.	For a period of 20 years reckoned from first year of profit as defined in Regulations No. 1 of 1978.
Exemption from customs levies at point of importation on plant, machinery and equipment required for the project and raw materials and other production related goods approved by BOI.	During lifetime of enterprise.
Exemption from turnover tax and excise duty at point of importation in respect of plant, machinery, equipment, raw materials and ancillary materials used in the manufacture of products for export.	During lifetime of enterprise.
Exemption from Exchange Control Act and authorization to open a Foreign Currency Banking Unit (FCBU) Account.	During lifetime of enterprise.
Duty free export of finished products.	During lifetime of enterprise.
Exemption from Import and Export Control Act.	During lifetime of enterprise.
Exemption from income tax on capital gains arising from the transfer of shares of an enterprise.	During lifetime of enterprise.
Exemption from income tax on emoluments of foreign employer.	During the first 3 years of project operation. Thereafter for a further period of 3 years income will be taxed at concessionary rate of 15%.

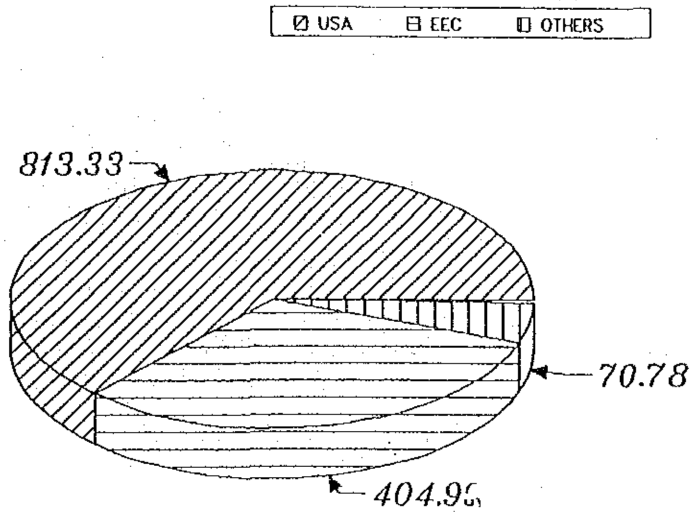
GARMENT EXPORTS VALUEWISE 1989 - 1993



GARMENT EXPORT - QUANTITYWISE 1989 - 1993



GARMENT EXPORTS - 1993
COUNTRYWISE VALUE (US$ MN.)



注〔本文はスリランカ繊維産業省のTEXTIL TRAINING & SERVICES CENTRE の MARKETING SPECIALIST のA.H.H.SAHEED氏の寄稿によるものです。〕

資料6　スリランカの全繊維製造企業リスト（除く縫製業）

TEXTILE FACTORY LIST - 1993

FACTORY NAME	ADDRESS	CONTACT PERSON	ACTIVITY	NO. OF MACHINES: SPINDLES	NO. OF MACHINES: POWER LOOMS	NO. OF MACHINES: KNIT/MAC.	NO. OF EMPLOYEES
1 ASIAN FABRIC LTD.	NO.67, ATAMPOLA WATTA, WATTALA	ACCOUNTANT	WEAVING,KNITTING & HANDLOOMS	-	20	12	122
2 ASIAN COTTON MILLS LTD.	NO 7, DE SOYSA MW., OFF TEMPLERS RD., MT. LAVINIA	CHIEF-ACCOUNTANT	SPINNING ONLY	24960	-	-	551
3 ALEXANDRA INDUSTRIES (CEYLON) LTD.	NO 467, GALLE RD, COLOMBO 3	COMMERCIAL MANAGER	KNITTING ONLY (FLAT KNITTING)	-	-	1250	2682
4 AMBALANGODA TEX. WEAVERS CO-OP SOC.	NO 143, 145, PATABANDIMULLA, AMBALANGODA	GENERAL MANAGER	WEAVING & HAND LOOMS	-	24	-	4
5 BACKSONS TEXTILE INDUSTRIES LTD.	49, BANKSHALL ST., COLOMBO 11	MANAGING DIRECTOR	FINISHING ONLY	-	-	-	298
6 BAREFOOT (PVT) LTD.	704, GALLE RD, COLOMBO 3	WEAVING MANAGERESS	HAND LOOMS ONLY	-	-	-	225
7 BERNARD BOTEJU INDUSTRIES LTD.	106/4, DUTUGEMUNU ST. DEHIWALA	MANAGING DIRECTOR	KNITTING & FINISHING	-	-	13	35
8 CLIFFTEX INDUSTRIES LTD.	17A, VIVEKANANDA HILL, COLOMBO 13	DIRECTOR	WEAVING KNITTING & FINISHING	-	137	8	229
9 CHILAW PUTTLAM DIST. CO-OP TEX. WEAVERS	NATTANDIYA	GENERAL MANAGER	WEAVING & HAND LOOMS	-	72	-	131
10 CASTLE TEXTILE INDUSTRIES LTD.	ST. THOMAS RD., BANDARAWELA	FACTORY MANAGER	WEAVING ONLY	-	231	-	461
11 CEE CEE CEE WEAVING INDUSTRIES LTD.	10A, GLEN ABER PLACE, COLOMBO 4	GENERAL MANAGER	WEAVING ONLY	-	284	-	368
12 CEYLON SYNTHETIC TEXTILE MILLS LTD.	752, BASELINE RD, COLOMBO 9	FINANCIAL ACCOUNTANT	WEAVING & FINISHING	-	470	-	-
13 DURO SYNTHETIC MILLS LTD.	149, OLD KANDY RD, DALUGAMA, KELANIYA	ACCOUNTANT	WEAVING & KNITTING	-	105	18	370
14 DON BIGWIN KNITTING & GARMENT INDUSTRIES	NO. 9, DE FONSEKA RD, COLOMBO 5	GENERAL MANAGER	KNITTING & FINISHING	-	-	17	9
15 DEPT. OF TEXTILE INDUSTRIES	SILK PROJECT, DEPT. TEX. INDUSTRIES, COL. 2	DEPUTY DIRECTOR (HAND LOOM)	HANDLOOMS ONLY	-	-	-	206
16 DAGU LANKA (PVT) LTD.	MIRIGAMA RD, DISAGEWATTA, KATANA	MANAGING DIRECTOR	WEAVING ONLY	-	192	-	501
17 GIHAN TEX. INDUSTRIES LTD.	450/26, KOSWATTA, THALANGAMA NORTH	ACCOUNTANT	WEAVING & HAND LOOMS	-	35	-	180
18 GALLE TEX. WEAVERS CO-OP SOC.	NO. 9, HIMMUBURA CROSS RD, GALLE	GENERAL MANAGER	WEAVING & HAND LOOMS	-	86	-	208
19 HYBRO INDUSTRIES	10A, GLEN ABER PLACE, COLOMBO4	GENERAL MANAGER		-	-	-	-
20 HYCO WEAVING INDUSTRIES LTD.	10A GLEN ABER PLACE, COLOMBO 4	GENERAL MANAGER	WEAVING ONLY	-	336	-	424
21 H & T TEXTILE INDUSTRIES LTD.	25, TEMPLERS MW., MT. LAVINIA	DIRECTOR	WEAVING ONLY	-	34	-	61
22 HEENATIGALA GARMENT (PVT) LTD.	22, LAKE RD, MAHARAGAMA	MANAGING DIRECTOR	KNITTING ONLY	-	-	4	10
23 HEYLES ADC TEXTILES LTD.	25, FOSTER LANE, COLOMBO 10	FINANCE MANAGER	FINISHING (DYEING WOVEN & PIECE GOOD)	-	-	-	-
24 HEYLES MGT KNITTING MILLS LTD.	25, FOSTER LANE, COLOMBO 10	FINANCE MANAGER	KNITTING ONLY	-	-	-	-
25 ISIN LANKA (PVT) LTD.	157A, KEYNSE RD, COLOMBO 8	DIRECTOR	SPINNING ONLY	10500	-	-	373
26 J.B. TEXTILES INDUSTRIES LTD.	133, MEETOTAMULLA RD, WALLAMPITIYA	DIRECTOR	WEAVING & FINISHING ONLY	-	173	-	758
27 JANAHITHA KNITTING INDUSTRIES LTD.	137, MAIN ST. COLOMBO 1	ACCOUNTANT	KNITTING ONLY	-	-	12	80
28 KABOOL LANKA (PVT) LTD.	23, LILIE ST., COLOMBO 2	GENERAL MANAGER(SALES)	SPINNING WEAVING & FINISHING	100000	930	-	2730
29 KUNDANMAL INDUSTRIES LTD.	26, KEYZER ST, COLOMBO 11	GENERAL MANAGER	WEAVING KNITTING & FINISHING	-	169	7	488
30 KANDY TEXTILE INDUSTRIES LTD.	P.O. BOX 1033, NO 110,114, MAIN ST., COLOMBO 11	GENERAL MANAGER	SPINNING & WEAVING	10752	136	-	373
31 KANDYGS HANDLOOM (EXPORTS) LTD.	NO 25, NEELAMMAHARA RD, MAHARAGAMA		WEAVING & HAND LOOMS	-	10	-	95
32 KALAM INDUSTRIES	195, KERAWALAPITIYA RD., WATTALA	PARTNER	SPINNING ONLY	2400	-	-	54
33 KURUNEGALA TEX. WEAVERS CO-OP	NO. 4, MIHIDU MW., KURUNEGALA	GENERAL MANAGER	HAND LOOMS ONLY	-	-	-	355
34 KURUWITA TEXTILE MILLS LTD.	NO 36, 2ND CROSS ST, COLOMBO 11	DIRECTOR	WEAVING ONLY	-	240	-	707
35 LANKA TRICOTTING INDUSTRIES LTD.	NO 245, MAIN ST., COLOMBO 11	MANAGING DIRECTOR	KNITTING & FINISHING	-	-	16	-
36 LANKA TEXTILES & EMPORIUM LTD.	NO 93, JAWATTE RD, COLOMBO 5	ACCOUNTANT	WEAVING ONLY	-	233	-	461
37 LANKA SYNTHETIC INDUSTRIES LTD.	LADY CATHERINE'S DRIVE,RATMALANA	FACTORY MANAGER	WEAVING ONLY	-	35	-	44
39 METIWALA WEAVING MILLS	METIWALA, TELWATTA	MANAGING DIRECTOR	WEAVING ONLY	-	21	-	35
39 M.K.C. INDUSTRIES (PVT) LTD.	NO 17,GANEMULLA RD., WELLAMPITIYA.	ACCOUNANT	KNITTING,FINISHING,PRINTING & READY MADE GARMENTS	-	-	8	181
40 MATTEGAMA TEXTILE MILLS	1ST FLOOR, NO 10, VAJIRA RD, COLOMBO 5	DEPUTY FIANANCE MANAGER	SPINNING ONLY	23136	-	-	815
41 MARADAGAHAMULA TEX. WEAVERS CO-OP	MARANDAGAMULA	ACCOUNTANT	WEAVING & HAND LOOMS	-	96	-	332
42 MAHABELLANA WEAVING MILLS LTD.	111A, BANKSHALL ST., COLOMBO 11	PROPRIATER	WEAVING ONLY	-	60	-	-
43 MATARA DIS. TEX. WEAVERS CO-OP	ISADEEN TOWN, MATARA	GENERAL MANAGER	WEAVING & HAND LOOMS	-	48	-	85
44 OCENIC KNITTERS (PVT) LTD.	4, KANDAWALA MW., RATMALANA	DIRECTOR	KNITTING & FINISHING	-	-	10	90
45 PADMA WEAVING MILLS (PVT) LTD.	111-A, BANKSHALL ST., COLOMBO 11	MANAGING DIRECTOR	WEAVING & FINISHING	-	52	-	71
46 PUGODA TEXTILES LANKA LTD.	422, GALLE RD, COLOMBO 3	MANAGER(PROD.PLANG.&CONT.)	SPINNING WEAVING & FINISHING	25296	632	-	2881
47 RAN FABRIC (PVT) LTD.	A 14-15, INDUSTRIAL ESTATE, EKALA, JA-ELA	GENERAL MANAGER	WEAVING & KNITTING	-	92	2	213
48 RANSIRI TEXTILE INDUSTRIES LTD.	NO. 49, KOTTAWA, PANNIPITIYA	TECHNICAL DIRECTOR	WEAVING & KNITTING	-	24	1	65
49 SUPERTEX PROCESSING (PVT) LTD.	METIWALA, TELWATTA	MANAGING DIRECTOR	FINISHING ONLY	-	-	-	41

FACTORY NAME	ADDRESS	CONTACT PERSON	ACTIVITY	NO. OF MACHINES: SPINDLES	NO. OF MACHINES: POWER LOOMS	NO. OF MACHINES: KNIT/MAC.	NO. OF EMPLOYEES
50 SWASTIK TEXTILE INDUSTRIES LTD.	137, MAIN ST., COLOMBO 11	DIRECTOR	WEAVING & FINISHING	-	54	-	112
51 SASCON KNITTING CO. (PVT) LTD.	76/2, MINUWANGODA RD, EKALA, JA-ELA	ACCOUNTANT	KNITTING ONLY	-	-	70	669
52 SATCO ENTERPRISES (PVT) LTD.	265/5, SRI SADDHARMA MW., COLOMBO 10	DIRECTOR	WEAVING ONLY	-	83	-	79
53 SISIRI WEAVING MILLS LTD.	216, 2ND CROSS ST., COLOMBO 11	DIRECTOR	WEAVING, KNITTING & FINISHING	-	20	9	149
54 SARATH DAYARANSI FABRICS	935, ETHULKOTTE, KOTTE	ACCOUNTANT	WEAVING ONLY	-	6	-	16
55 SOUTH TEXTILES LANKA (PVT) LTD.	4/F,STD. CHTD. BANK BLDG.,17,JANADHIPATHI MW.,COL.1	CHIEF ACCOUNANT	WEAVING ONLY	(26704)	308	-	278
	17, JANADHIPATHI MAWATHA, COLOMBO 1			-	-	-	-
56 SRI LANKA STATE TRADING (TEX.) CORPORATION	P.O. BOX 1649, 93 JAWATTA RD., COLOMBO 5	Q.C. MANAGER	HAND LOOMS ONLY	-	-	-	307
57 TECHSTREAM CO. LTD.	NAGAHAWATTE RD., RANALA, KADAWATHA	MANAGEMENT ACCOUNTANT	KNITTING & FINISHING	-	-	40	156
58 THAKSALA WEAVERS LTD.	16, S.D.S. JAYASINGHE MW., KOHUWALA, NUGEGODA	GENERAL MANAGER	WEAVING ONLY	-	119	-	368
59 TEXWEL JURSEY LTD.	No. 340,GALLE RD, KATUBEDDA, MORATUWA	COST CO-ORDINATOR	KNITTING & FINISHING	-	-	26	50
60 UNITED SPINNING & WEAVING MILLS	NO.545,SANGARAJA MAWATHA, COL.10		SPINNING ONLY	23688	-	-	515
61 VEYANGODA TEXTILE MILLS LTD.	NO.323, GALLE ROAD, COLOMBO 4	DIRECTOR (PLAN. & SUPLS.)	SPINNING WEAVING & FINISHING	26000	514	-	2426
62 VELONA SILKS LTD.	NO. 340, GALLE RD., KATUBEDDA, MORATUWA	FACTORY MANAGER	WEAVING ONLY	-	52	-	-
63 WELIGAMA CO-OP TEX. WEAVERS CO-OP	MUDUGAMUWA,WELIGAMA	GENERAL MANAGER	WEAVING & HAND LOOMS	-	24	-	-
64 WELWOVEN LTD.	UYANWATTA, POLGOLLA	ACCOUNTANT	WEAVING ONLY	-	242	-	422
65 WIJEWEERA GARMENTS (PVT) LTD.	NO. 346, GALLE ROAD, MATARA	ACCOUNTANT	KNITTING ONLY	-	-	9	-
66 DEEPA TEXTILE INDUSTRIES (PVT) LTD.	NO. 155/58, PARAGETHI MAWATHA, KATUWANA RD., HOMAGAMA	DIRECTOR	WEAVING ONLY	-	20	-	32
67 RAJASALU (PVT) LTD.	D.S. SENANAYAKE NEW TOWN, ANURADHAPURA	GENERAL MANAGER	WEAVING ONLY	-	96	-	132
68 TEX FABRIC EXPORTS LTD.	106/3, DUTUGEMUNU STREET, DEHIWELA	MANAGING DIRECTOR	KNITTING & FINISHING	-	-	7	-
69 LAKMAL TEXTILE INDUSTRIES	17B, MILAGIRIYA AVENUE, BAMBALAPITIYA, COLOMBO 4	ACCOUNTANT	WEAVING ONLY	-	41	-	58
70 KEGALLE DISTRICT TEX. WEAVERS CO-OP	RANWALA, KEGALLE	GENERAL MANAGER	HAND LOOMS ONLY	-	-	-	470
71 D.M. AGENCIES (PVT) LTD.	NO. 18, KORALAWELLA, MORATUWA	MANAGING DIRECTOR	KNITTING ONLY	-	-	24	391
72 MINUWANGODA TEX. WEAVERS CO-OP	NAIWALA ROAD, UDUGAMPOLA	ACCOUNTANT	WEAVING & HAND LOOMS	-	20	-	156
73 MONTECALO GARMENTS (WEAVING SECTION)	NO. 24, PARAKRAMA ROAD, MATTUMAGALA, RAGAMA	MANAGER	WEAVING ONLY	-	48	-	-
74 LUSICA TRADERS (PVT) LTD.	NO. 2/7, HOLY CROSS AVENUE, MORATUMULLA, MORATUWA	DIRECTOR	WEAVING ONLY	-	6	-	4
75 CITIZEN GARMENTS LTD.	NO.12, DE MEL ROAD, KATUBEDDA, MAWATHA	DIRECTOR	WEAVING ONLY	-	84	-	77
76 KADAWATHA TEX. WEAVERS CO-OP	SOORIPAHUWA, KADAWATA	GENERAL MANAGER	HAND LOOMS ONLY	-	-	-	100
77 HAMBANTOTA TEX. WEAVERS CO-OP	KADURUPOKUNA ROAD, PALLIKKUDAWA, TANGALLE	GENERAL MANAGER	WEAVING & HAND LOOMS	-	20	-	28
78 LANKA KNITTING CO.	854,NEGOMBO RD., KARAGAMPOKUNA, WATTALA	PROPRIETOR	KNITTING & FINISHING	-	-	11	23
79 LANKA WEAVING MILLS LTD.	340, GALLE ROAD, KATUBEDDA, MORATUWA	FACTORY MANAGER	KNITTING ONLY	-	-	18	-
80 UDAYA INDUSTRIES	157/A NEELAMMAHARA, BORALESGAMUWA	PROPRIETOR	WEAVING & HAND LOOMS	-	2	-	8
81 NINICO INDUSTRIES	1165 A, COTTA ROAD, RAJAGIRIYA	MANAGER	WEAVING ONLY	-	46	-	86
82 HAKMANA TEX. WEAVERS CO-OP	KOONGALA, HAKMANA	GENERAL MANAGER	WEAVING & HAND LOOMS	-	50	-	159
83 D.H. APPAREL (PVT) LTD.	87/1 STATION ROAD, HOMAGAMA	MANAGING DIRECTOR		-	-	-	-
84 WIJAYA TEXTILES MILL	HAPUWALANA, MARANDAGAHAMULA	MANAGER	WEAVING ONLY	-	13	-	20
85 HERATH & ARIYADASA ENTERPRISES	HENPITA GEDARA, MARANDAGAHAMULA	PROPRIETOR		-	9	-	-
86 A-TEX. INTERLACERS	INDUSTRAIL PARK, HERALIYAWALA ESTATE, KURUNAGALA	PROPRIETOR	WEAVING ONLY	-	-	-	-
87 SEELANI MANAGEMENT SERVICES	182/C, KIRIWELA WATTA, MILLATHE, KIRINDIWELA	PROPRIETOR	HAND LOOMS ONLY(NOT IN PRODUCTION)	-	100	-	-
88 HEYTEX LTD.	25 FOSTER LANE,COLOMBO 10	EXECUTIVE	WEAVING ONLY	-	10	-	64
89 SIMITEX (PVT) LTD.	190, MORONTHUDUWA RADD, MALAGAMA, WADDUWA	MANAGER	WEAVING ONLY	-	72	-	15
90 YARNTEX (PVT) LTD.	151, KEYZER STREET, COLOMBO 11	DIRECTOR	WEAVING ONLY	-	-	-	41
91 TERANITEX (PVT) LTD.	MANGALAGAMA, MOLAGODA, KEGALLE	MANAGING DIRECTOR	WEAVING ONLY	-	-	-	-
92 TITIMA TRADING	599, PARAKRAMA MAWATHA, WELISARA, RAGAMA			-	-	-	-
93 A.S.B.GURUGE & CO. (PVT) LTD.	248, PAUL VI CENTRE, FRONT STREET, COLOMBO 11	CHAIRMAN		-	-	-	-
94 MEEZAM WEAVING MILLS	198B KEYZER STREET, COLOMBO 11	PARTNER	WEAVING ONLY	-	54	-	54
95 FAB TEXTILES MILLS	145/2 NEGOMBO ROAD, LIYANAGEMULLA, SEEDUWA	PROPRIETOR	WEAVING ONLY	-	90	-	69
96 HIRANI BROTHERS TEXTILE (PVT) LTD.	180, PRINCE STREET, COLOMBO 11 (P.O. BOX 1643)	PARTNER	FINISHING ONLY	-	-	-	-

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FACTORY NAME	ADDRESS	CONTACT PERSON	ACTIVITY	NO. OF MACHINES: SPINDLES	POWER LOOMS	KNIT/MAC.	NO. OF EMPLOYEES
97 J.L. INDUSTRIES (PVT) LTD.	765 GALLE ROAD, NALLURUWA, PANADURA	MANAGING DIRECTOR	WEAVING & FINISHING ONLY	-	40	-	130
98 BOUNUSKA INDUSTRIES	KARALIYADDA, THELDENIYA	PROPRIETOR	WEAVING ONLY	-	16	-	17
99 SHUMS PRODUCTS	167, KEYZER STREET, COLOMBO 11	PROPRIETOR		-	-	-	-
100 JAYANTHA TEXTILE (PVT) LTD.	PALANWATTA, PANNIPITIYA	DIRECTOR	WEAVING ONLY	-	18	-	27
101 LANTEX ASSOCIATES (PVT) LTD.	DOSTHARAWATTA, MUDUKATUWA, MARAWILA	MANAGING DIRECTOR	WEAVING ONLY	-	9	-	18
102 D.N.W. TEXTILES	YAKKELA ROAD, RADAWANA	MANAGER	WEAVING ONLY	-	12	-	8
103 ADIL TEXTILES MILLS (PVT) LTD.	33, THELANGAPATHA ROAD, WATTALA	DIRECTOR	WEAVING ONLY	-	18	-	39
104 SURIYA TEXTILE MILLS	32/34, SECOND FLOOR, 3RD CROSS STREET, COLOMBO 11	DIRECTOR	WEAVING ONLY	-	332	-	675
105 AMARASIRI WEAVERS	BADALGAMA ROAD, MARANDAGAHAMULA	ASST. MANAGER		-	-	-	-
106 M.N.W. WIJETHUNGE & SONS	41, GALAGEDARA ROAD, KATUGASTOTA	PROPRIETOR	WEAVING ONLY	-	38	-	15
107 GOLDEN TEXTILE MILLS	2ND FLOOR, 311, OLD MOOR STREET, COLOMBO 12		WEAVING ONLY	-	20	-	23
108 ECOTEX INDUSTRIES	197, 2ND CROSS STREET, COLOMBO 11		WEAVING & KNITTING	-	47	16	-
109 TOLARAMS INDUSTRIES LTD.	72A, ATTIDIYA ROAD, RATMALANA	DIRECTOR	WEAVING ONLY	-	-	-	48
110 DAYASIRI GARMENTS INDUSTRIES	123/2, PANNIPITIYA ROAD, BATTARAMULLA	PROPRIETOR	KNITTING ONLY	-	-	7	-
111 KNITFIN (PVT) LTD.	90/24 S. MAHINDA MAWATHA, COLOMBO 10	ACCOUNTANT	FINISHING ONLY	-	-	-	6
112 CIRFAB (PVT) LTD.	90/24 S. MAHINDA MAWATHA, COLOMBO 10	ACCOUNTANT	KNITTING ONLY	-	-	3	3
113 THAKSALA HANDLOOMS LTD.	16 S.DE S. JAYASINGHE MAWATHA,KOHUWALA, NUGEGODA	ACCOUNTANT	HAND LOOMS ONLY	-	-	-	11
114 FERNTEX TEXTILE INDUSTRIES	22, MUNNAKURA, NEGOMBO	OWNER	WEAVING ONLY	-	2	-	2
115 NAGINDAS INDUSTRIES	P.O. BOX 2031, 137 MAIN STREET, COLOMBO 11	ACCOUNTANT	WEAVING & FINISHING	-	76	-	187
116 COLOMBO DISTRICT TEX. WEAVERS CO-OP	PILIYANDALA ROAD, KOTTAWA	GENERAL MANAGER	WEAVING & HAND LOOMS	-	14	-	49
117 KALUTARA DISTRICT TEX. WEAVERS CO-OP	252 GALLE ROAD, NORTH KALUTHARA	GENERAL MANAGER		-	-	-	-
118 KAMBURUPITIYA TEX. WEAVERS CO-OP	KAMBURUPITIYA, YATIYANA	GENERAL MANAGER	WEAVING & HAND LOOMS	-	48	-	280
119 VEYANGODA TEX. WEAVERS CO-OP	17 BANDARANAYAKE, VEYANGODA	GENERAL MANAGER	WEAVING & HAND LOOMS	-	96	-	278
120 PATHMA DISTRIBUTORS	158 KEYZER STREET, COLOMBO 11	PROPRIETOR	WEAVING ONLY	-	39	-	57
121 UNION TEXTILE INDUSTRIES (PVT) LTD.	233/3 HEKITHTHA ROAD, WATTALA	DIRECTOR	WEAVING ONLY	-	112	-	59
122 AJANTHA TEXTILE INDUSTRIES LTD.	8C MALIGAWA ROAD, RATHMALANA	DIRECTOR	KNITTING ONLY	-	-	13	30
123 SKANSCO TRADING CO.	79A MESSENGER STREET, COLOMBO 12	PROPRIETOR	KNITTING ONLY	-	-	5	-
124 KULIYAPITIYA TEX. WEAVERS CO-OP	KULIYAPITIYA	GENERAL MANAGER	HAND LOOMS ONLY	-	-	-	100
125 NUWARAKALANIYA TEX. WEAVERS CO-OP		GENERAL MANAGER	HAND LOOMS ONLY	-	-	150	67
126 THUNKORALA TEX. WEAVERS CO-OP SOC.	KAHANAWITA, DEHIOVITA	GENERAL MANAGER	HAND LOOMS ONLY	-	-	-	200
127 MATALE DISTRICT TEX. WEAVERS CO-OP	GONGAWELA ROAD, MATHALE	GENERAL MANAGER	HAND LOOMS ONLY	-	-	-	66
128 MAHANUWARA DISTRICT TEX. WEAVERS CO-OP	UYANWATTA, POLGOLLA	GENERAL MANAGER	HAND LOOMS ONLY	-	-	-	212
129 SARASAVI INDUSTRIES	375/1B HIGH LEVEL ROAD, MAKUMBURA, PANNIPITIYA	PROPRIETOR	KNITTING ONLY (SOCKS)	-	-	17	45
130 SINGHE INDUSTRIES	37/7,RUBBER WATTA RD,2ND LANE,GANGODAWILA,NUGEGODA	OWNER	WEAVING & HAND LOOMS	-	37	-	67
131 SEMITEX INDUSTRIES (PVT) LTD.			WEAVING ONLY	-	62	-	89
132 THARANGA TEXTILE INDUSTRIES			WEAVING ONLY	-	10	-	15
133 UNION KNITTING INDUSTRIES	69, MALIBAN STREET, COLOMBO 11		KNITTING ONLY (GAS MANTLES)	-	-	12	25
				-	-	-	-
				-	-	-	-

INSPECTION & TESTING
TECHNIQUES FOR TEXTILE
PROJECT
1990 - 1991 (JAPAN).
COUNTRY REPORT

BY:

W.G.H. METTANANDA
B.Sc. - A.T.I. (C.Text) U.K.
TEXTILE TECHNOLOGIST

INTRODUCTION

This paper has been complied for the prsentation at the group training course in INSPECTION AND TESTING TECHNIQUES FOR TEXTILE PRODUCTS.

1990 - 1991

The venue of training programme is in International Trade and Industry Inspection Institute, Ministry of International Trade and Industry - 2 - 49-10 Nishihara, shibuya-ku, Tokyo, 151 Japan.

The programme will commence on 14th January 1991 and will finish on 24th March, 1991.

TEXTILE INDUSTRY IN SRI-LANKA

By:
W.G.H.METTANANDA.
B.Sc. -A.T.I.(C.Text)
[Textile Training & Services Centre- (Sri Lanka)]

The Textile Industry in Sri-Lanka has grown in great proportions since the 'open economic policy' of the present government.

Prior to 1977 textiles made in Sri-Lanka had no marketing problems as there was restrictions on imports of textiles. It was purely a matter of producing and selling.

After 1977, the industry has seen modernization and expansion to a great extent. Government owned five mills are now managed by Foreign Companies and some have shown good results and are producing better quality fabrics.

SPINNING:

Total spindleage that supplies cotton fabric industry is about 246,800. This belongs to about six big mills.

WEAVING INDUSTRY:

This has greater capacity than knitting sector. It can be divided into four sections.

HANDLOOMS:

Recent figures estimate the handlooms to be about 30,000. An estimated handloom production of 24 million metres per year has been included for the years 1978 onwards.

SMALL SCALE WEAVING UNITS:

These units operate in groups of 24-48 looms. These units are owned by the Department of Textile Industries (branch of the Ministry of Textile Industries). Some of these units have been transferred to private ownership.

Looms: slow speed, plain weaving, shuttle changing, 125 to 150cm.
reed width speeds - 120 to 220 p.p.m.
output of 40 million metres.

FILAMENT OR SYNTHETIC SECTOR:

Small units of 20-50 looms
larger units upto 300 looms
Total Fabric output about 30 million metres

Looms: 140 to 160 cm. Reed space
120 to 140 p.p.m.
Few shuttleless looms (about 70) are also available at present.

MILL SECTOR:

Over 500 looms in their sheds.

Pirn or shuttle changing

Reed space 120-140 cms.

Speed 180 to 200 p.p.m.

Contribution of about 26 million metres.

KNITTING INDUSTRY:

Again could be divided into 4 groups.

LARGER DIAMETER CIRCULAR KNITTERS:

Six Mills having 10-12 Machines in operation. Rest scattered in groups of 3's, 4's or 5's and total about 200 machines.

WARP KNITTING:

About 60 warp knitting machines mainly in and around Colombo. About 6 companies own 6-12 machines. Rest in singles or pairs.

HAND & POWER OPERATED FLAT KNITTERS:

About 3500 hand flat machines. About 5% of these power operated. About 5 Companies own them. They are all export oriented. knitting wools, acrylics and blends of these.

HOSIERY:

About 900 hosiery machines. 80% of these within Industrial Promotion Zone. Machines for local market knit 100% nylon socks. IPZ Mills are 100% Export Oriented and use cotton, acrylic and wool or their blends.

PROCESSING CAPACITY:

Distributed among 32 Mills in the country. Annual processing capacity of : 200 million metres of fabric

150 tons of socks

500 tons of dyed yarn

Two third of this capacity - for cotton fabrics

One third - for synthetic fabrics

CONSUMPTION:

In 1986 the consumption is estimated to be around 135 million metres per capita consumption is therefore about 8.5 metres.

TRAINING AND LABOUR:

Unskilled labour in Sri-Lankan remains in abundance. Most of the present skilled labour force has had no formal training opportunities. Textile Industry in general lacks, middle and upper-middle management staff to a large extent.

At present there are 3 Institutions to cater to this need of educating and training personnel for Textile Industry.

ORGANISATION CHART

DIRECTOR

DEPUTY DIRECTOR

Snr. Tech. (Spinning)	Snr.Tech. (Weaving)	Snr. Tech. (Knitting)	Snr. Tech. (Finishing)	Engineer	Snr.Tech. Testing & Q.C.	Management Division (Marketing, Industrial Economist, Human Resources & Industrial Engineering)	Administrative Manager
T.T.	T.T.			Asst. Eng.	T.T.		Adm. Asst.
				Technicians	Asst. T.T.		Clerks
A.T.T.	A.T.T.				W.I.s		
W.I.	W.I.	W.I.	W.I.				

Textile Training & Services Centre.

My organisation is known as the Textile Training and Services Centre. It is an Institute that belongs to the Ministry of Handlooms & Textiles Ministry.

It was set up in to serve the Textile Industry in Sri Lanka to perform the following main functions;

Training of Technical personnel already in the Industry and also newcommers who are to take-up to Textiles.

To supply necessary assistance in setting up new factories and also consultancy services in disciplines such as Spinning, Weaving, Knitting, Processing and Management.

To assist the Industry in Testing of Raw Materials, Intermediate products and final products such as yarns & fabrics.

Testing Facilities and Equipment

Our organisation undertakes testing of

(a) textile fibres
(b) textile yarns
(c) fabrics and
(d) dyes etc.

A list of the equipment available.

Government Inspection System for General Industrial Products.

Sri-Lanka Standard Institute in the organisation that is responsible for setting up of standards and carrying out inspection of industrial products.

Sri-Lanka Standard Institute has set up standards for many industrial products with the help of other International Standards and Committees consisting of Industrialists, professionals and customers.

This Institute offers their SLS mark for Industrialists who have registered their products with them. Institute obtains samples from the open market and also from the factories randomly and checks for conformity.

The number of Institutes that have obtained the SLS marks is very few and almost nil for the Textile Industry.

Problems in Inspection System

There is still no Law to say that all products should be necessarily inspected for confirmity of quality.

Since lot of imports are allowed the number of persons necessary to inspect all incoming goods as well as the internal products would be an enormous task.

At present there are no sufficient number of trained and qualified Inspection to undertake such are important task.

Inspection System for Textile Products

At present there is no Inspection system for Textile Products.

The Textile Training & Services Centre would be the ideal Institute to introduce such a system, said it is only interest is in the field of Textiles.

Thus it is possible in the near future that the Textile Ministry may introduce an Inspection System which would be a necessity for all manufacturers.

Methods of Quality Checking by Manufacturers & Exporters

In the field of Textiles same manufacturers have their own Mill Laboratories when they check the quality of their own products.

When necessary they get the raw materials and other products checked by Institutes such as ours.

Exporters get their products checked by foreign countries or sometimes from local Institutes such as ours.

Inspection Institutes

At present these are the following Inspection & Testing Institute of Texiles.

1. Sri Lanka Standard Institute

2. Textile Training & Services Centre.

3. Moratuwa University Textile Department.

Though there is no direct relation of these institutes to ours, we exchange ideas and help each other when the necessity occurs.

High oriority export Industrial Prodcuts

1. Garments

2. Handi-crafts

3. Hand-loom textile products

Study Programme

In this course the study programs that would interest me are the Lectures Practical Training and visits to the Manufacturers.

資料8　ＴＴ＆ＳＣの予算

Textile Training And Services Centre
Trial Balance as at 31st December 1993

	L.F	DR. AMOUNT Rs. Cts.	CR. AMOUNT Rs. Cts.
Government Grant	2		9350000.00
Debtors Controlling	37	702478.25	
Course fees	52		1358400.00
Test reports	56		1367478.50
Consultation fees	66		835859.37
Miscellaneous Receipts	77		276111.94
Seminar fees	85		30600.00
Land	1	2399775.00	
Building	3	18798309.84	
Plant and Machinery	5	32037867.65	
Motor vehicle	7	2160857.85	
Loss from Sales of Motor Vehicle	9	66309.50	
Fur. Fitt. Fix. & Equip.	11	4057855.82	
Books & Periodicales	19	189936.11	
Income & Expenditure A/C	23	21685322.18	
Capital Grant From the Government	27		39333271.25
Assets transferred by the Ministry	31		18792500.00
Unpaid wages	33		457.60
Stock As at 1.1.93	35	85930.00	
Spare Parts	39	167520.00	
Director - Telecommunications	43		19252.68
Ceylon Elect. Board	47		77653.00
National Water Supplies	51		6806.08
Central Engineering Con. Bureau	55		88110.00
Provision for Depreciation -on Build	59		3576680.94
Plant & Machinery	63		24706133.57
Motor Vehicle	66		913324.47
Fur.Fit.Fix.& Eq.	70		1046540.81
Depreciation	73	4308808.87	
Returned Cheque	80	2700.00	
Payment in Advance	81	345662.95	
Accrued Expenses	83		562858.14
U.N.D.P.	91		0.50
Deposit	93	40480.00	
		87049814.02	102342038.85

Exp. Dev. Board	95		160444.40
Tranfers to Scholership fund	96	128663.50	
Scholarship Fund Expenses	97		302757.50
Welfare medical scheme	98	223278.16	
C.Gunasekara	101	3110.00	
Aitken Spence Ltd.	102	6949.00	
Clothing Industry Training Institute	105	20633.60	
Sri Lanka Army	106	75591.00	
National Apprenticeship Board	109	105.00	
Allowance to Chairman	111	82800.00	
Salaries & Wages	118	3979287.03	
Cost of Living Allowance	124	641360.00	
EPF	129	541829.08	
ETF	136	136484.33	
Casual Wages	140	51599.54	
Staff Training Travel Fellowship	162	1582815.00	
Salary Advance	165	100.00	
Commissioner General ofInland Rev.	188		2.00
Overtime	192	189796.57	
Auditor Generals Dept.	197		75000.00
Festival Advance	204	29612.79	
Special Advance	210	1419.10	
Speacial Loans	214	23865.02	
Distress Loan	219	867192.45	
Loan Interest	225		54678.24
Encashment of unutilized leave	227	246651.85	
Fees to Board of Governors	232	14000.00	
Miscellaneous Services	242	218916.42	
Training fees for officers	246	42336.33	
Gratuity	248	200000.00	
Provision for Gratuity	249		152350.00
Repairs & Maintenance of Building	257	249324.24	
Plant & Machinery	263	156401.40	
Fur. Fit. Fix Equi	266	175666.61	
Motor vehicles	272	155205.73	
Cost of Fuel	279	229061.10	
Cost of Stores	287	135139.15	
		97459008.02	103087270.99

Printing & Stationery	293	266711.20	
Cost of Raw Materials	297	144112.32	
Travaling and Subsistance	302	189082.25	
Utility Services	308	967250.87	
Communication Services	316	155394.92	
Security Service	320	339378.12	
Advertisement	327	310828.00	
Insurance Charges	331	173629.21	
Audit fees	333	7500.00	
Annual Subscription fees	335	56672.00	
Membership subscription fees	339	73298.48	
Lecturer Fees	349	224565.50	
Consultation Charges	354	96125.00	
Tea Expenses	356	44321.80	
Transport charges	361	226261.00	
Staff Incentive	363	949689.00	
Bank A/C 4234		1088440.46	
5600		302757.50	
4961		12245.34	
		103087270.99	103087270.99

Chairman Accountant

Date : 29.04.94 Textile Training & Services Centre.

Textile Training & Services Centre
Income and Expenditure Account for the year
ended 31st December 1993

1992 (Rs.)		Rs. Cts.	Rs. Cts.	Rs. Cts.
	<u>Income</u>			
8675000	Government contribution	-	-	9350000.00
	Contribution from abroad	-	-	-
	Licence fees cess collection and other taxes	-	-	-
	Registration & annual fees	-	-	-
	Fees for services rended	-	-	-
	Sales of publication	-	-	-
7650	Profit from sale of Fixed assets	-	-	
1694735	Other - Course fees	-	1358400.00	-
764267	Test report charges	-	1362478.50	-
639603	Consultations	-	835859.37	-
36800	Seminar income	-	30600.00	-
36469	Interest receivable	-	54678.24	-
-	Fines	-	-	-
-	No pay recoveries		-	-
171042	Miscell. receipts (Note 11)	-	276111.94	3923128.05
12025566				13273128.05
	Less Expenditure			
	Administration & General Expenses			
2912318	Salaries & Wages	3979287.03	-	-
389322	EPF	541829.08	-	-
97926	ETF	136484.33	-	-
407500	CLA	641360.00	-	-
315126	Security services	339378.12	-	-
8700	Fees to board of governors	14000.00	-	-
73000	Allowance to chairman	82800.00	-	-
177438	Encashment of unutilised leave	246651.85	-	-
190974	Overtime	189796.57	-	-
46286	Casual wages	51599.54	-	-
9900	Gratuity	200000.00	-	-
647599	Staff incentive	949689.00	-	-
54263	Training fees for officers	42336.33	-	-
42143	Annual subscription fees	56672.00	-	-
279125	Lecturer fees	224565.50	-	-
84579	Membership subscription fees	73298.48	-	-
2000	Consultation fees	96125.00	-	-
7500	Audit fees	7500.00	-	-
1337131	Staff Training Travel Fellowship	1582815.00	9456187.83	
7082830				

	Operating & maintenance expenses			
313284	Repair & Maint. of land & build.	249324.24	-	-
86784	Plant & Machi.	156401.40	-	-
182131	Fur. Fitt. Fix. & Equip.	175666.61	-	-
97538	Motor vehicle	155205.73	-	-
260586	Cost of fuel for cars & vans	229061.10	-	-
	for boilers	-	-	-
824267	Utility services	967250.87	-	-
142088	Communication services	155394.92	-	-
407886	Printing & stationery (note 12)	289866.20	-	-
325264	Miscellaneous services (note 13)	218916.42	-	-
171356	Insurance	173629.21	-	-
270605	Advertisement	310828.00	-	-
167972	Travelling & subsistance	189082.25	-	-
410450	Cost of stores (note 14)	173083.47	-	-
84842	Welfare medical scheme	223278.16	-	-
152530	Transport charges	226261.00	-	-
42221	Tea expenses	44321.80	-	-
165494	Transfers to scholarship fund	128663.50	-	-
97822	Gamudawa 1992	-		
-	Loss from sale of M. vehicle	66309.50	4132544.38	
-------		---------		
4203120				
	Depreciations			
469662	Buildings	469957.75	-	-
3196440	Plant & machinery	3203786.76	-	-
240830	Motor vehicle	432171.57	-	-
199918	Furniture Fitt. Fix. & Equip.	202892.79	4308808.87	-
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4106850				
	Reserch and Development expenses	-	-	-
	Social Welfare	-	-	-
	Subsidies paid on behalf of Govt.	-	-	-
	Business Turnover Taxes	-	-	-
	Other Inderect Taxes	-	-	-
	Interest Payable	-	-	-
	Others			
15392800	Total	-	-	17897541.08
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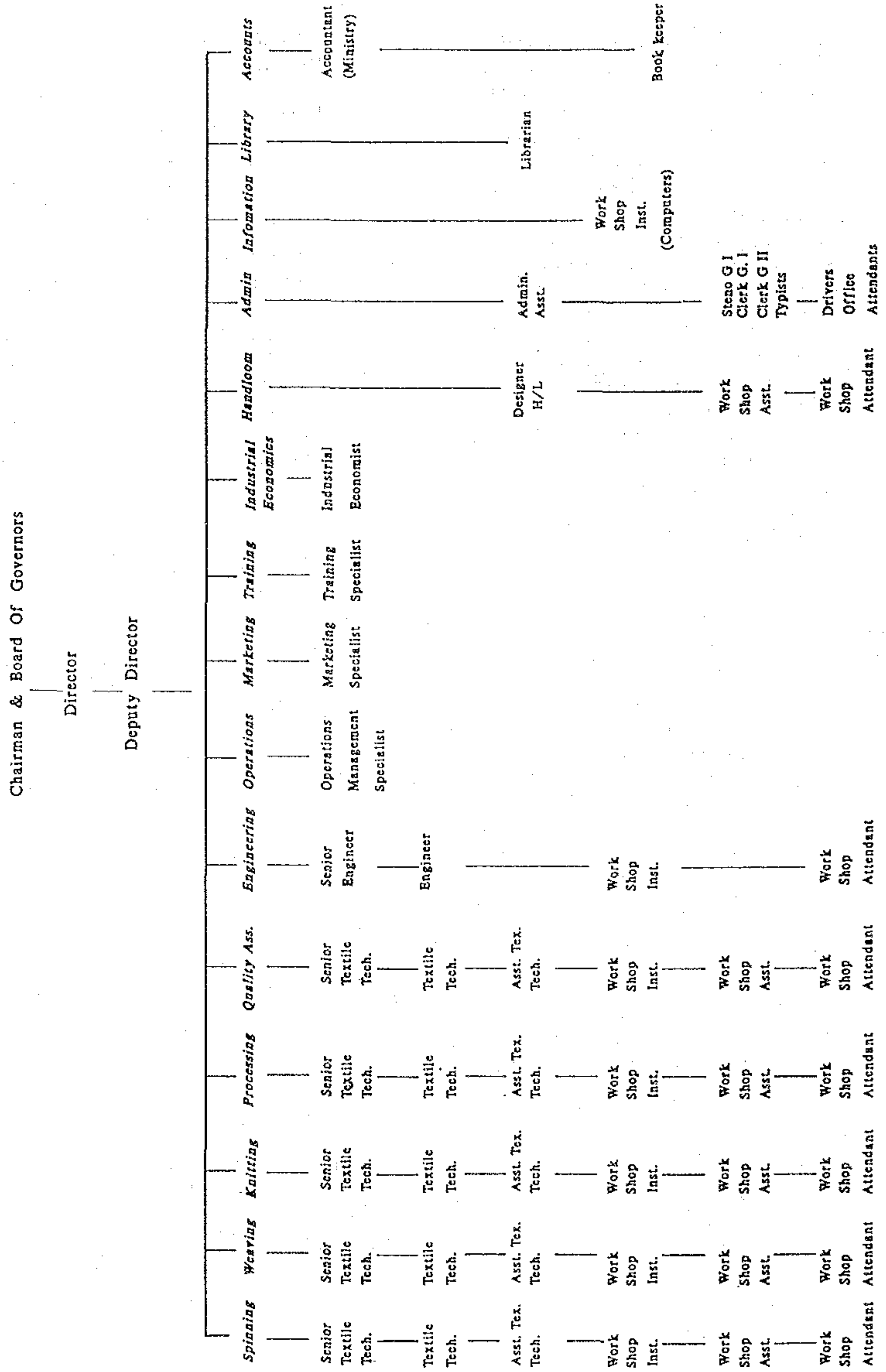
(3367234)	Excess of Expenditure over Income	-	-	(4624413.03)
=========				=========

Date : 29.04.1994 Chairman Accountant

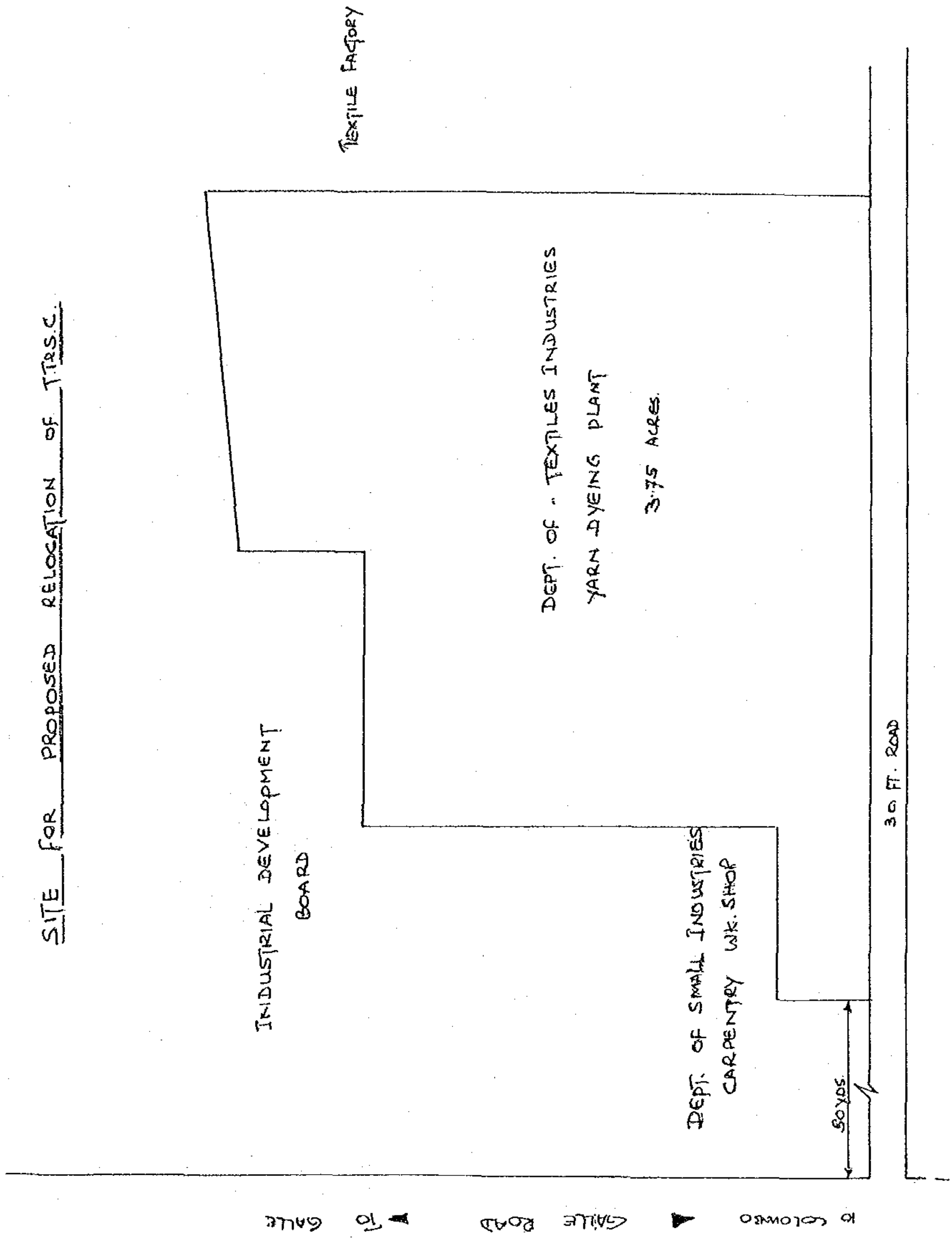
Textile Training & Services Centre

ＴＴ＆ＳＣの組織図

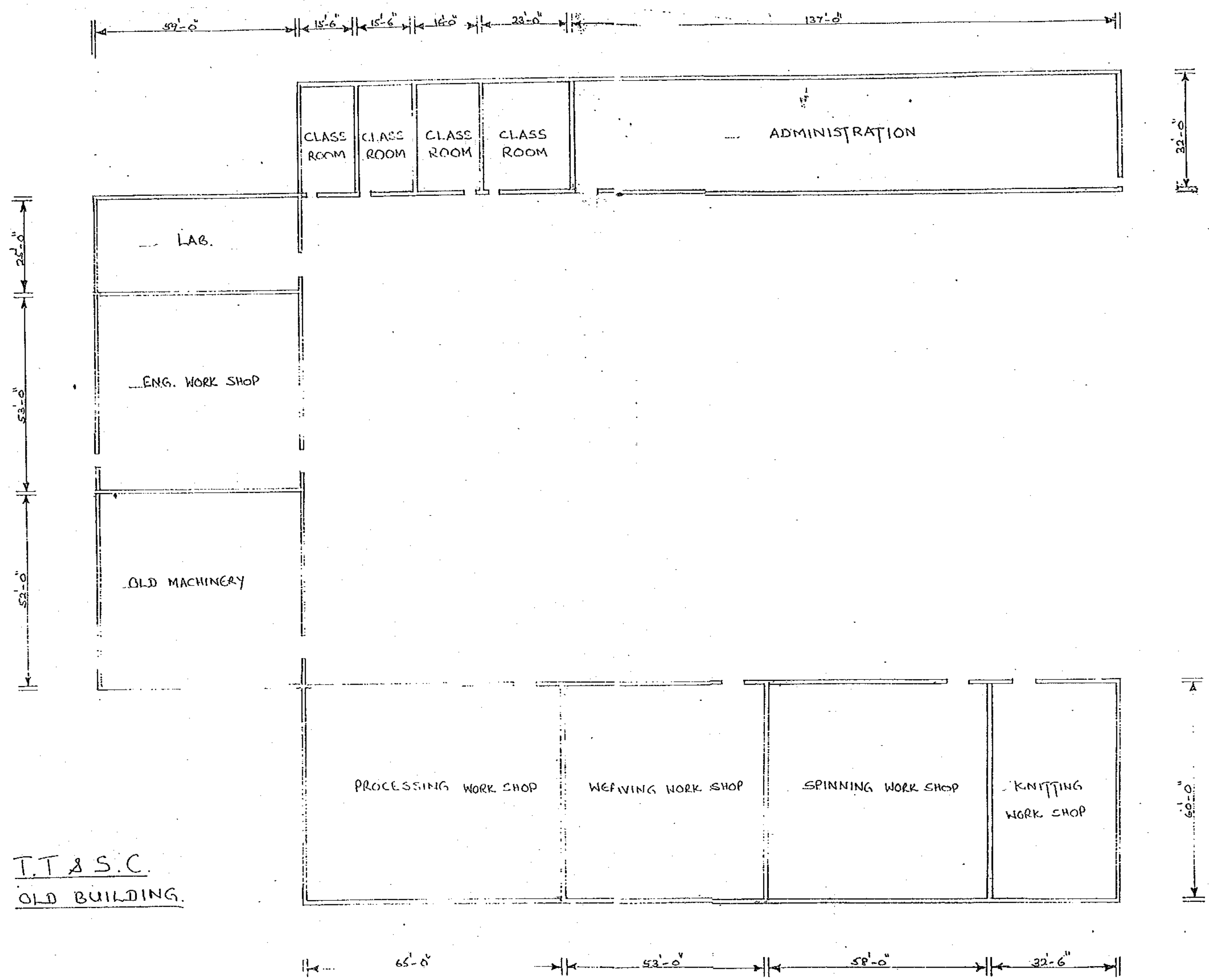
TEXTILE TRAINING & SERVICES CENTRE - ORGANISATIONAL CHART



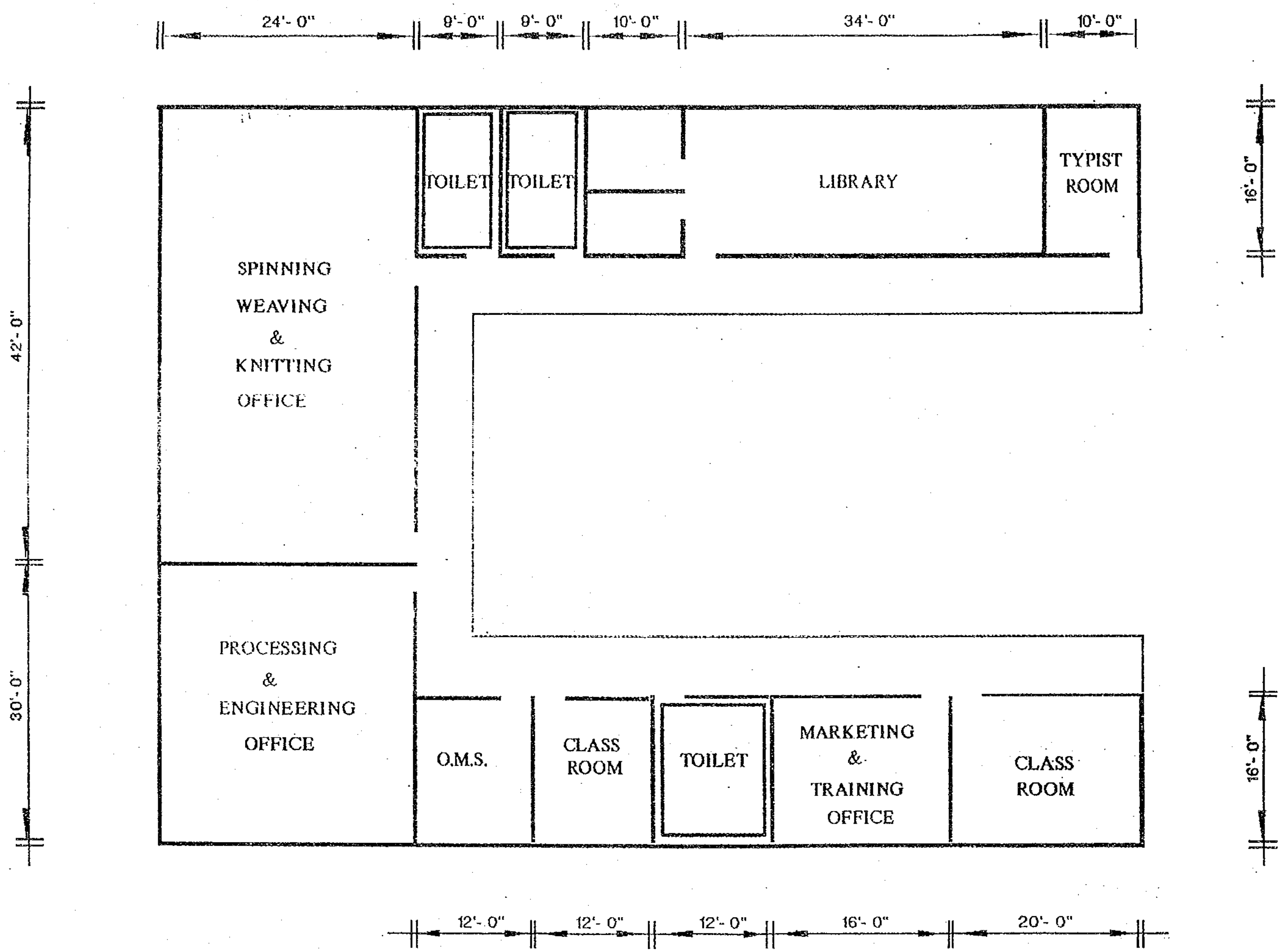
ＴＴ＆ＳＣの新サイト予定地図（旧サイトより車で５～１０分）
※廃屋と国営の手織物工場がある。



TT&SCの現サイトレイアウト



T.T.& S.C. NEW BUILDING



資料9　ＣＩＴＩの予算

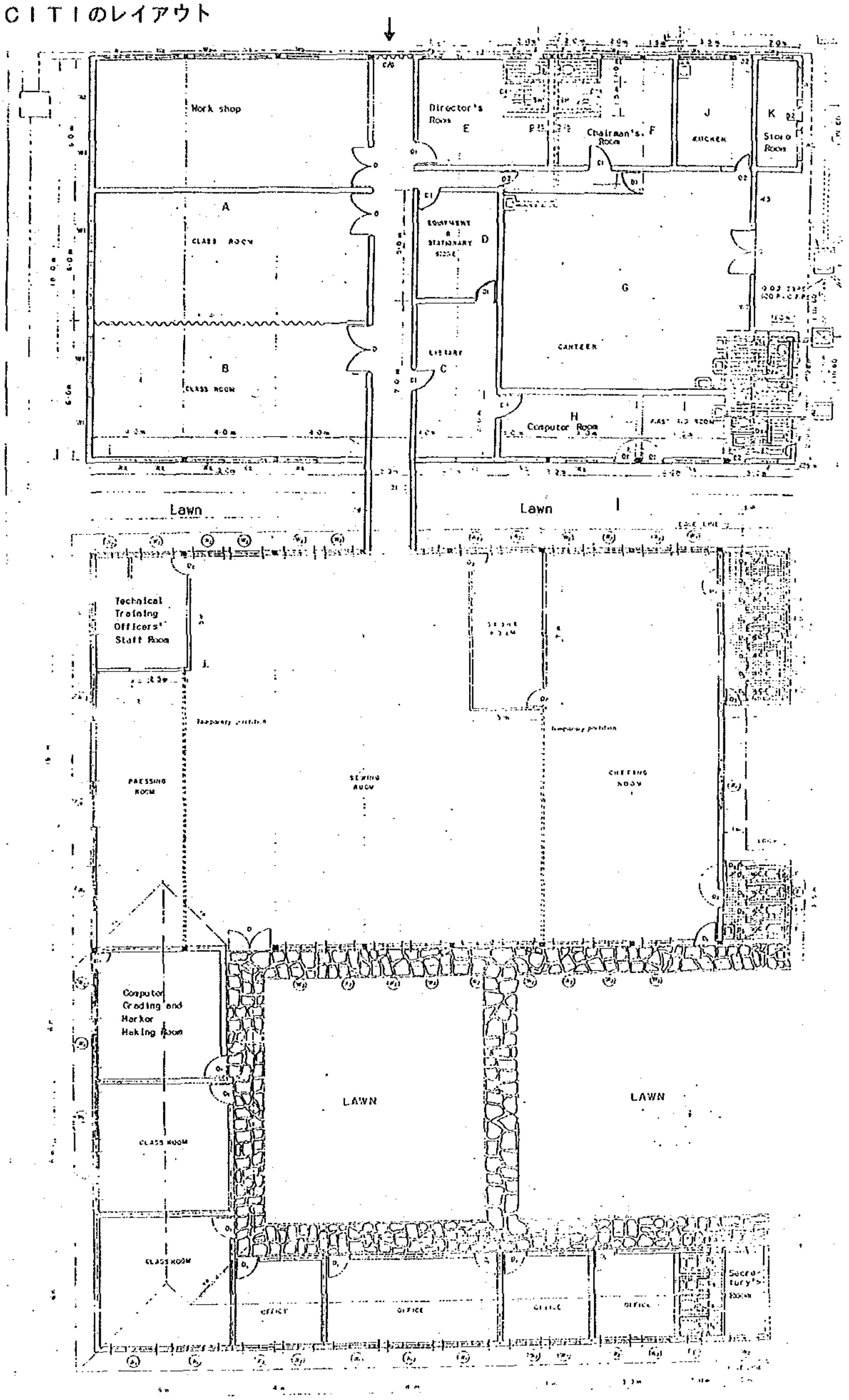
CLOTHING INDUSTRY TRAINING INSTITUTE

INCOME & EXPENDITURE ACCOUNT FOR THE YEAR ENDED ON 31.12.1993

1991 Rs.Cts.		Rs.Cts	Rs.Cts	Rs.Cts
	INCOME			
2,740,000.00	Treasury Grant for Recurrent expenditure		3,815,000.00	
3,656,850.00	Course Fees		3,588,900.00	
3,750.00	Consultancy Fees		4,350.00	
36,452.08	Miscellaneous Income		68,718.54	
100,865.00	Customer Services		134,163.00	
51,937.53	Profit from sale of Fixed Assets		104,785.83	
-	Profit from Seminars & Workshops		69,408.59	
-	Profit from Clothing Magazine		7,483.00	7,792,808.96
6,589,854.61				7,792,808.96
	LESS - EXPENDITURE			
	ESTABLISHMENT			
(78,003.75)	Maintenance of Land & Buildings	35,453.00		
(87,963.69)	Insurance	82,375.62		
(402,035.86)	Electricity	397,653.10		
(24,544.84)	Water	26,227.69	541,709.41	
	ADMINISTRATION			
(1,556,962.48)	Salaries & Wages	2,018,900.14		
(167,478.91)	Employees Provident Fund	215,065.22		
(41,866.31)	Employees Trust Fund	53,766.30		
(52,355.99)	Overtime	82,140.91		
(961,309.25)	Incentive Scheme	929,047.94		
(44,321.50)	Travelling & Subsistance	46,542.50		
(168,129.23)	Printing & Stationery	203,359.74		
(86,098.48)	Training Materials	86,854.16		
(6,272.66)	Cost of Stores	3,923.02		
(61,025.00)	Advertisement charges	75,800.00		
(178,682.00)	Miscellaneous expenses	124,626.80		
(118,128.28)	Medical scheme	118,303.68		
(166,923.90)	Fuel	203,291.18		
(52,407.10)	Postage & Telephone charges	55,161.58		
(1,258,623.00)	Staff Training	2,025,548.17		
(210,084.08)	Security charges	226,252.08		
(9,000.00)	Fees to Board of Governors	15,500.00		
(23,589.25)	Welfare Expenses	24,390.75		
(84,700.00)	Gratuity	98,505.00		
-	Transport charges	28,200.00		
(18,943.67)	Maintenance of Furniture & Fittings	15,241.67		
(24,112.87)	Maintenance of Machinery	1,755.78		
(40,628.50)	Maintenance of Office Equipment	39,207.26		
(56,156.51)	Maintenance of Training Equipment	266,085.33		
-	Maintenance of Computer	32,442.02		
(165,427.14)	Maintenance of Vehicles	130,832.40		
(111,231.80)	Deficit of "Clothing" Magazine	-		
(4,192.00)	Unserviceable items written off value	978.00		
-	Loss on vehicle accidents	4,310.00		
-	Provision for bad debtors	22,072.50		
(20,000.00)	Provision for Audit fees	40,000.00	7,188,104.13	

	FINANCE			
(4,811.00)	Bank charges		2,774.05	
	DEPRECIATIONS			
(131,264.88)	Buildings	131,264.88		
(65,590.30)	Furniture & Fittings	67,484.30		
(51,623.58)	Computers	103,247.15		
(47,353.70)	Office Equipment	49,887.60		
(140,478.79)	Training Equipment	150,121.62		
(1,512.22)	Canteen Equipment	1,821.72		
(205,817.00)	Industrial Sewing Machines	445,272.00		
(243,095.96)	Motor Vehicles	649,323.60	1,598,422.87	9,331,010.46
(582,890.87)	EXCESS OF INCOME OVER EXPENDITURE			(1,538,201.50)

ＣＩＴＩのレイアウト



CLOTHING INDUSTRY TRAINING INSTITUTE

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