



INDUSTRY DATA BOOK

2022



FOOTWAER AND LEATHER PRODUCTS
SECTOR



MINISTRY OF INDUSTRIES

FOOTWEAR AND LEATHER PRODUCTS SECTOR

MINISTRY OF INDUSTRIES

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Foreword

The Industrial Data book 2022 is an effort to support the Industrialists, in coping with current economic challenges, and contribute to their sustainable socioeconomic development through streamlining the vital process of productive decision making. This Data book focuses on the statistical factors effecting the economic growth specifically concerning the export expansion.

The statistical analyses given in this Data book are based on comprehensive statistical accounts drawn from the Department of Census and Statistics (DCS), Department of Customs (DoC), Export Development Board (EDB) and the Central Bank of Sri Lanka (CBSL) as a reference.

This publication includes statistical references pertaining to exports and imports including the tables on productivity indicators prepared based on Manufacturing establishments and number of persons engaged in each sector, statistics on Principal indicators of Industrial Activity from year 2015 to 2019, value of outputs and output components, value of intermediate consumptions, employment by nature, statistics on Economic indicators of industrial activities classified by industry class and statistics on imports and exports.

I am grateful to the Director General, Planning Division, Ministry of Industries Mr. Aruna Bandara and his team for the immense support given in this endeavor. Further, my heartfelt gratitude goes to Ms. Rajitha Wijesinghe, Statistician, Ministry of Industries and her team members Mr. Nirosh Chathuranga Pathiraja and Mr. Shamith Rashmika Jayawardane for their well-committed contribution and tremendous effort to make this a reality while working in collaboration with the DCS. Also, I would like to thank Ms. Chamari Fonseka, Deputy Director, and Mr. Umesh Hapuarachchi, Information and Communication Technology Officer of the Information Technology Division for their contribution in providing the write-ups and cover page designs.

I strongly believe that this Industrial Data book 2022 will serve a valuable purpose on the present and future status of productivity and economic growth in industrial sectors, while influencing prolific process of policymaking in the industry sectors. I am of the view that this publication would be beneficial for all levels of industrial data consumers including policy makers, economic planners, academics, researches and any other interested parties in future.

J.M. Thilaka Jayasundara
Secretary
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Abbreviations

CIF	cost, insurance, and freight
FOB	Free on Board
Kg	Kilogram
GDP	Gross Domestic Products
MT	Metric Ton
No	Number
n.e.c	Not elsewhere classified
(‘000) No	Thousand Number
(‘000) Pairs	Thousand Pairs
(‘000) Rs	Thousand Rupees
Qty.	Quantity
Rs.	Rupees
Rs. Mn	Rupees Million

Overview

Leather industry of Sri Lanka can broadly be categorized into three sub sectors in terms of inputs combinations, namely manufacturing of tanning, footwear and other leather-based products. The leather products use several raw materials other than genuine imported leather to produce leather-based crafts. Locally manufactured natural rubber is highly demanded for the manufacturing of health concerned niche market products. Such as medicated shoes, gloves, and cloths etc. Most of these products are heavily labour intensive and environmentally restricted by authorities apart of rigid contemporary rules and regulations which dis-incentivize the investment. Therefore, its GDP contribution remains less than 1% over the years in terms of both market prices and constant prices.

Even Sri Lanka is still not absorbed the leather industry potential to contribute to the economy even it presently produces more than 30 million shoe pairs annually including leather thongs. Number of companies engaged in manufacturing and export of shoes consist of 10 large export companies, 30 medium scale companies and about 3000 small scale manufactures.

Apart from the leather-based products, there are other products such as gloves, wallets, purses, bags and handy crafts which are manufactured by several companies and proprietorships including 5 large companies, 10 medium companies and around 1000 small scale enterprises,

There is a competitive edge in the export market for leather based products such as foot wear, gloves, wallets, bags, purses, and industrial accessories. However, the share of export contribution out of the total exports

have shown a gradual decrease from 1.37 in the year 2016 as the highest to 0.26, the lowest in the year 2021.

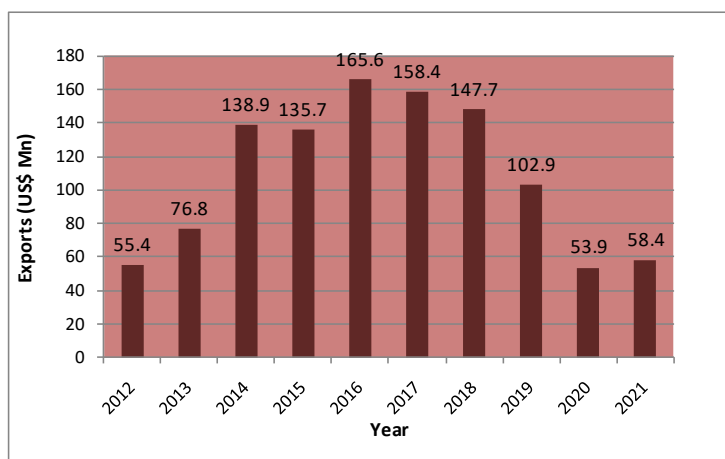
Sri Lanka does not allow tanning due to environment and cultural reasons. Therefore, the total need of tanned leather has to be imported to the country. In the year 2021 the total import of leather amounted to 2061 Mt at a cost of USD 4.7 million.

Thus, the import of tanned leather and leather-based products was USD 24 million and exports of leather related products was USD 58 million In 2021, which made a trade surplus of USD 34 million. This was mainly due to the decline in footwear imports from USD 3.14 million 2020 to USD 2.46 million in 2021 which resulted a decrease of 22% in total footwear imports

However, export of leather-based products in the last decade has remarkably declined by 64.7% from USD 165.6 million in 2016 as the highest to USD 58.4 million in year 2021, due to the Covid 19 crisis and it might further be negatively influenced by the present foreign currency restrictions.

Value addition process in the industry needs innovative fashion crafting and experience skills. The percentage of value addition compared with other manufacturing process is insignificant due to inefficiencies, lack of craftsmen ship and due to lack of process automations in intermediary goods.

There is a high potential to increase export of these products for the present buyers at UK, France, Italy and European Union countries provided the investment opportunities will be improved.



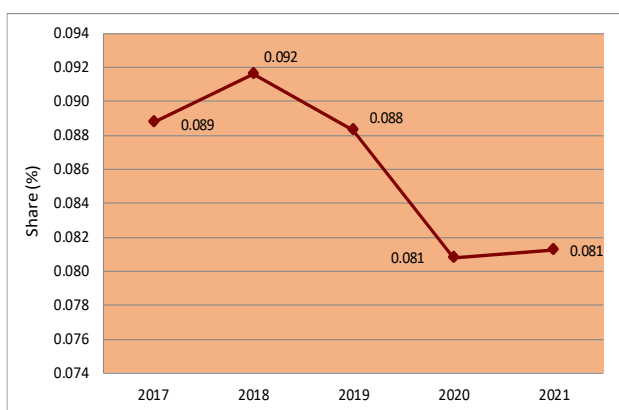
Source: Export Development Board

Figure 1: Export earnings of Leather and Footwear Industry

Table 1: Manufacture of Leather and Related Product Contributions to the GDP at Current and Constant Market Price (2017 - 2021)

Year	Current market price		Constant market price	
	Contribution Value (Rs. Mn)	Share (%) of Total Current GDP	Contribution Value (Rs. Mn)	Share (%) of Total Constant GDP
2017	11828.94	0.089	9405.82	0.100
2018	13092.19	0.092	8886.98	0.092
2019	13241.92	0.088	9018.69	0.091
2020	12143.04	0.081	7670.60	0.080
2021	13653.07	0.081	7491.44	0.076

Source : Department of Census and Statistics



Regardless of the inflation effect prevailing in the country, the real GDP share of leather products have shown a sharp decrease over the last five years. This was mainly due to the Covid 19 impact and the import restrictions introduced in 2019.

Source : Department of Census and Statistics

Figure 2: The Contribution of the Leather and Related Products Sector to the Share of the Manufacturing Industry to the GDP

Table 2: Leather, Footwear and Leather Products Manufacturing Establishments (2015-2018)

Year	Establishments less than 25 persons engaged		Establishments 25 or more persons engaged	
	No of Establishments	Persons engaged	No of Establishments	Persons engaged
2015	335	2,923	78	6,345
2016	236	1,755	71	9,428
2017	191	1,521	69	8,873
2018	329	3,281	102	8,846
2019	321	2,499	61	7,766

The number of employees in the leather industry has increased during the last 5 years with a remarkable increase of job opportunities in the micro and small enterprises particularly from 2017 to 2018 by 116 percent.

Source : Department of Census and Statistics, Annual Survey of Industries

Table 3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2015) - (Establishments with 5 or more engaged)

2015								
Year	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	195	899	637	153,278,853	353,859,189	162,679,131	191,180,058	11,512,658
10 to 99	206	5,009	4,594	907,086,676	9,963,566,668	6,152,569,412	3,810,997,256	118,336,510
100 & above	10	3,360	3,360	1,044,806,480	5,597,238,268	2,654,900,396	2,942,337,872	1,366,222,238
Group total	411	9,268	8,591	2,105,172,009	15,914,664,125	8,970,148,939	6,944,515,186	1,496,071,406

Source : Department of Census and Statistics, Annual Survey of Industries

Table 4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2016) - (Establishments with 5 or more engaged)

2016								
Year	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	191	1,156	745	131,626,800	544,408,080	205,677,854	338,730,226	2,228,067
10 to 99	98	3,360	3,299	608,970,887	2,608,054,930	1,491,650,121	1,116,404,809	47,905,835
100 & above	18	6,667	6,665	2,328,445,608	16,002,091,527	9,398,725,643	6,603,365,883	1,569,171,913
Group total	307	11,183	10,709	3,069,043,295	19,154,554,537	11,096,053,618	8,058,500,918	1,619,305,815

Source : Department of Census and Statistics, Annual Survey of Industries

Table 5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2017) - (Establishments with 5 or more engaged)

2017								
Year	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	157	992	713	168,655,230	871,877,648	418,574,090	453,303,557	10,467,816
10 to 99	83	3,367	3,225	623,799,575	3,588,226,577	1,939,034,521	1,649,192,056	80,875,423
100 & above	20	6,035	6,032	2,131,374,382	15,828,441,163	9,228,082,049	6,600,359,114	1,251,668,776
Group total	260	10,394	9,970	2,923,829,187	20,288,545,388	11,585,690,660	8,702,854,727	1,343,012,015

Source : Department of Census and Statistics, Annual Survey of Industries

Table 6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2018) - (Establishments with 5 or more engaged)

2018								
Year	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	200	1,367	1,101	194,856,942	820,350,616	498,012,349	322,338,268	74,801,354
10 to 99	211	5,725	5,495	1,295,049,453	7,375,391,447	3,656,643,906	3,718,747,541	640,802,079
100 & above	21	5,036	5,033	1,613,262,434	13,255,193,210	7,756,220,383	5,498,972,827	877,308,484
Group Total	432	12,128	11,629	3,103,168,829	21,450,935,273	11,910,876,638	9,540,058,636	1,592,911,917

Source : Department of Census and Statistics, Annual Survey of Industries

Table 7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2019) - (Establishments with 5 or more engaged)

2019								
Year	No of establishments	Persons engaged	Employees	Salary & Wages	Out put (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	264	1,601	1,041	226,660,698	1,043,219,089	602,187,230	441,031,859	2,713,596
10 to 99	95	2,736	2,635	588,337,289	4,106,172,675	2,272,402,624	1,833,770,052	510,399,735
100 & above	24	5,929	5,907	2,130,666,649	17,375,687,975	10,458,277,776	6,917,410,198	1,683,017,427
Group total	382	10,266	9,583	2,945,664,637	22,525,079,739	13,332,867,630	9,192,212,109	2,196,130,758

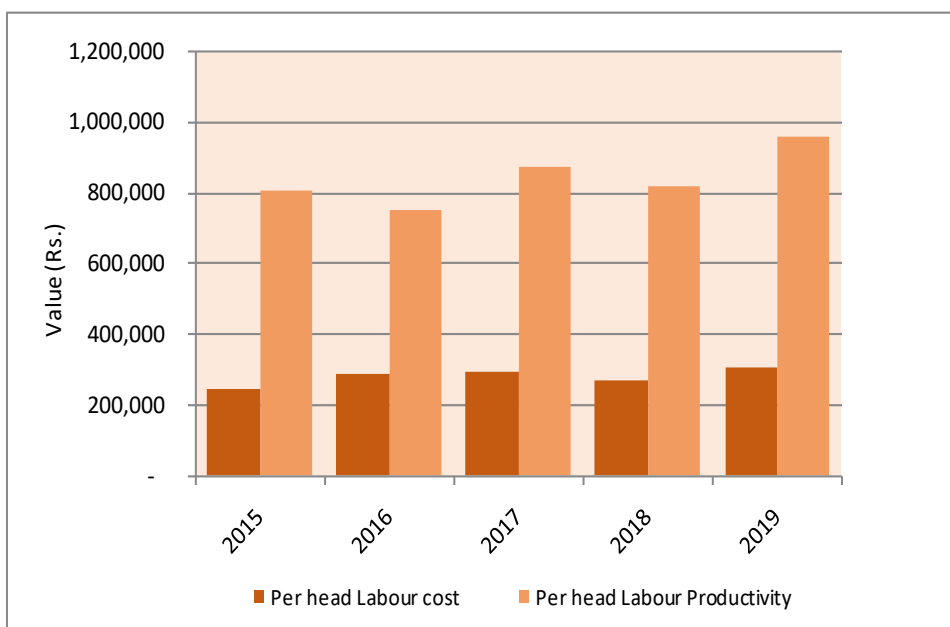
Source : Department of Census and Statistics, Annual Survey of Industries

Table 8: Manufacturing of Leather and Related Products Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	245,044	808,348	329.88
2016	286,585	752,498	262.57
2017	293,263	872,904	297.65
2018	266,847	820,368	307.43
2019	307,384	959,221	312.06

Per head productivity over the cost is extremely higher than 100 percent. Thus, the cheap labour and expensive niche market motivate investments in leather industry specially by local and entrepreneurs of the sector.

Source : Department of Census and Statistics, Annual Survey of Industries



Source : Department of Census and Statistics

Figure 3: Manufacturing of Leather and Foot wear Labour Productivity

Table 9: Value of Output & Output Components Classified by Leather and Related Products Industry - (Establishments 25 or more engaged)

Year	Output (Rs.)	Shipped (Rs.)/ products moved of the establish- ment (Rs.)	Change in Stocks (Rs.)	Industrial ser- vices & other revenue (Rs.)
2015	13,846,949,870	11,487,605,326	547,505,749	1,811,838,796
2016	18,130,937,927	17,118,902,326	420,417,436	591,618,165
2017	19,008,779,783	17,737,465,492	387,377,321	883,936,970
2018	17,355,227,727	16,080,289,166	291,035,573	983,902,988
2019	19,060,490,530	17,713,803,059	302,854,926	1,043,832,546

Source : Department of Census and Statistics, Annual Survey of Industries

The export marketability of more than 90 present products of the leather industry shows the potential in the export market. Government policy and incentives are an essential impetus to extend the positive trends in the export market.

Table 10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Leather and Related Products

Year	Intermediate consumption (Rs.)	Raw materials consumed (Rs.)	Cost of industri- al services done by others & other payments (Rs.)	Electricity & fuel consumed (Rs.)
2015	7,932,060,922	7,247,883,539	455,560,053	228,617,330
2016	10,699,972,446	8,841,726,952	910,948,907	947,296,588
2017	10,983,010,502	8,604,176,172	1,664,398,197	714,436,133
2018	9,601,052,309	7,257,332,635	1,640,652,621	703,067,052
2019	11,408,893,500	9,228,659,851	1,453,889,082	726,344,568

Source : Department of Census and Statistics, Annual Survey of Industries

Return on investment of the leather industry has shown nearly 30% margins which are equivalent to more than the weighted average cost of capital under the current inflation crisis. That indicates a positive investment atmosphere even in the present economic disinvestment context.

Table 11: Employment by nature of employment & gender classified by Industry division of Leather and Related Products Establishment with 25 or more persons engaged

Year	Working Proprietors (No)		Unpaid family work- ers (No)		Operatives (No)		Other employees (No)		Total persons en- gaged (No)	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
2015	60	-	-	-	2,171	2,843	882	390	3,113	3,232
2016	3	-	3	1	3,780	3,182	1,786	673	5,572	3,857
2017	45	2	43	1	3,131	2,674	1,472	1,505	4,691	4,182
2018	64	12	34	1	3,204	3,406	1,198	929	4,500	4,347
2019	48	2	18	4	3,252	2,588	1,364	489	4,683	3,084

Source : Department of Census and Statistics, Annual Survey of Industries

Table 12: Economic Indicators of Industrial Activity Classified by Industry Class (Establishments with 25 or more engaged)

Table 12.1: Manufacture of Leather and related products

Year	Output per persons engaged (Rs.)	Output per intermediate consumptions	Output per assets	Value added per persons engaged (Rs.)	Value added per intermediate consumptions	Value added per assets
2015	707,441	1.992	2.934	352,273	0.992	1.461
2016	583,368	2.584	1.223	357,638	1.584	0.75
2017	841,625	2.123	0.771	445,278	1.123	0.408
2018	1,248,311	1.773	1.365	544,311	0.773	0.595
2019	1,386,135	1.801	2.212	616,379	0.801	0.984

Source : Department of Census and Statistics, Annual Survey of Industries

Table 12.2: Tanning and Dressing of Leather; manufacture of luggage, handbags, saddlery and harness; dressing and dyeing of fur

Year	Output per persons engaged (Rs.)	Output per intermediate consumptions	Output per assets	Value added per persons engaged (Rs.)	Value added per intermediate consumptions	Value added per assets
2015	1,385,437	2.506	2.107	832,534	1.506	1.266
2016	1,092,908	4.118	9.241	827,491	3.118	6.997
2017	1,131,304	1.825	14.873	76,066	0.825	6.723
2018	1,377,953	2.652	3.483	858,305	1.652	2.169
2019	1,031,310	1.584	0.89	380,281	0.584	0.328

Source : Department of Census and Statistics, Annual Survey of Industries

Table 12.3: Manufacture of Footwear

Year	Output per persons engaged (Rs.)	Output per intermediate consumptions	Output per assets	Value added per persons engaged (Rs.)	Value added per intermediate consumptions	Value added per assets
2015	2,304,335	1.698	2.888	947,427	0.698	1.187
2016	1,951,508	1.676	2.14	786,835	0.676	0.863
2017	2,454,929	1.718	2.003	1,225,797	0.718	0.837
2018	2,065,725	1.742	1.946	879,821	0.742	0.829
2019	2,722,202	1.677	2.036	1,099,146	0.677	0.822

Source : Department of Census and Statistics, Annual Survey of Industries

Table 13: Categories of Employees by Nature of Employment Classified by Industry of Leather and Related Prod-

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	6,285	4,147	866
2016	9,421	5,464	1,499
2017	8,782	4,556	1,249
2018	8,736	4,957	1,653
2019	7,694	4,826	1,014

Source : Department of Census and Statistics, Annual Survey of Industries

During the period the reduction of skilled labour has compensated for the unskilled labour, where unskilled labour has increased by 91 percent in 2018.

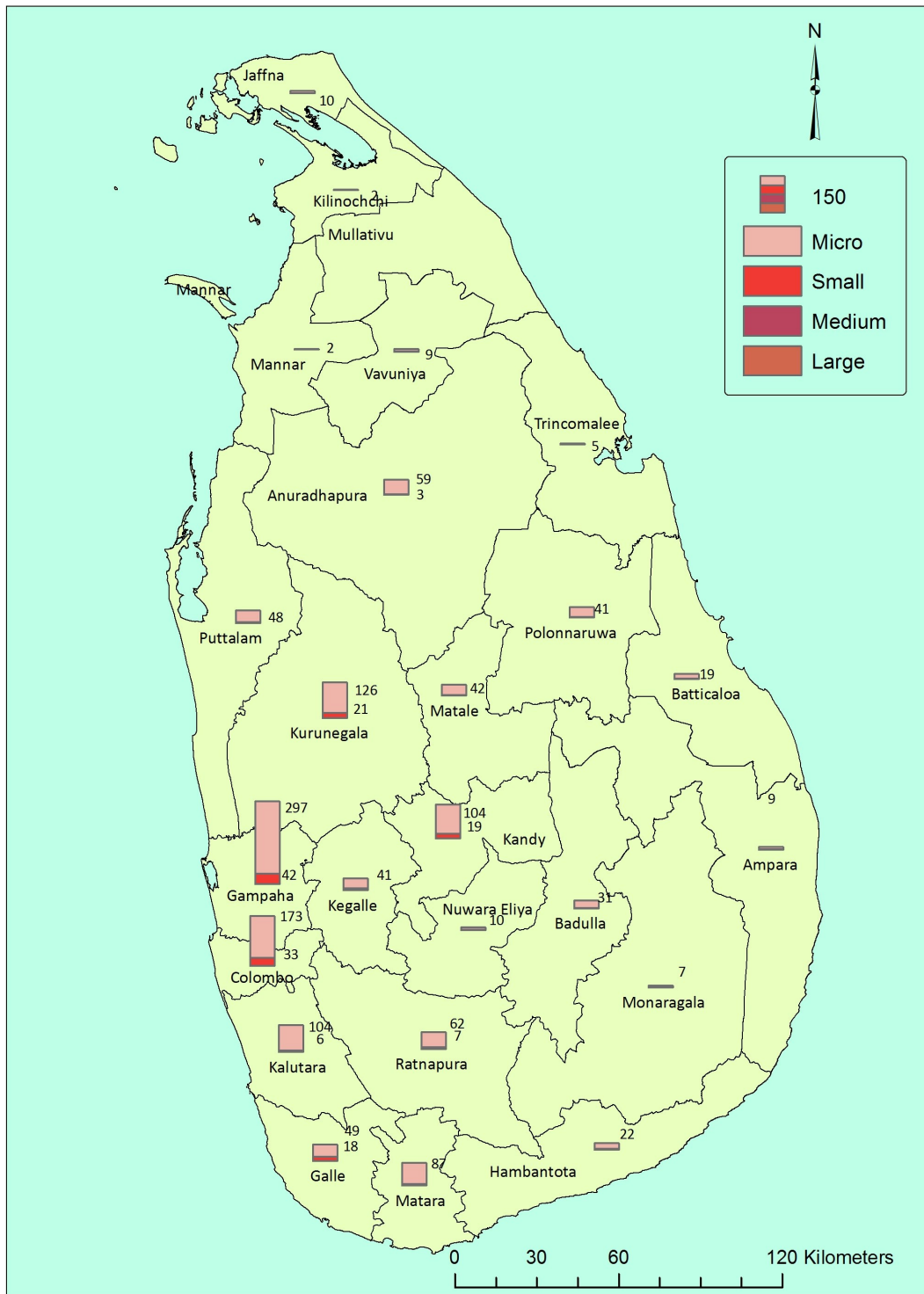
Table 14: Number of Leather and Related Products Manufacturing Industries and Engaged Persons in Sri Lanka (2013/14 Economic Census)

Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Tanning, dyeing & dressing of hides and skins; and manufacture of soft leather, metalized leather etc.	10	20	6	52	-	-	-	-
Manufacture of composition leather	40	61	4	27	2	118	-	-
Other tanning and finishing of leather n.e.c.	1	1	-	-	-	-	-	-
Manufacture of Luggage, bags, school bags, Purse & suitcases of any material.	1374	2143	185	1486	17	935	-	-
Manufacture of containers from reeds, Palmyrah leaves	1236	1445	21	171	2	90	-	-
Manufacture of other consumer goods of leather and substitutes of leather n.e.c.	32	45	4	28	1	80	-	-
Manufacture of leather footwear	935	1606	152	1439	25	1275	7	2839
Manufacture of footwear made primarily of vulcanized or mauled rubber	147	274	19	167	3	154	1	450
Manufacture of plastic and rubber footwear	330	595	53	470	11	558	3	2248
Manufacture of leather footwear parts	28	47	12	106	4	165	-	-
Manufacture of other kinds of footwear n.e.c.	297	545	55	449	4	145	1	268
Total	4430	6782	511	4395	69	3520	12	5805

Source: Department of Census and Statistics

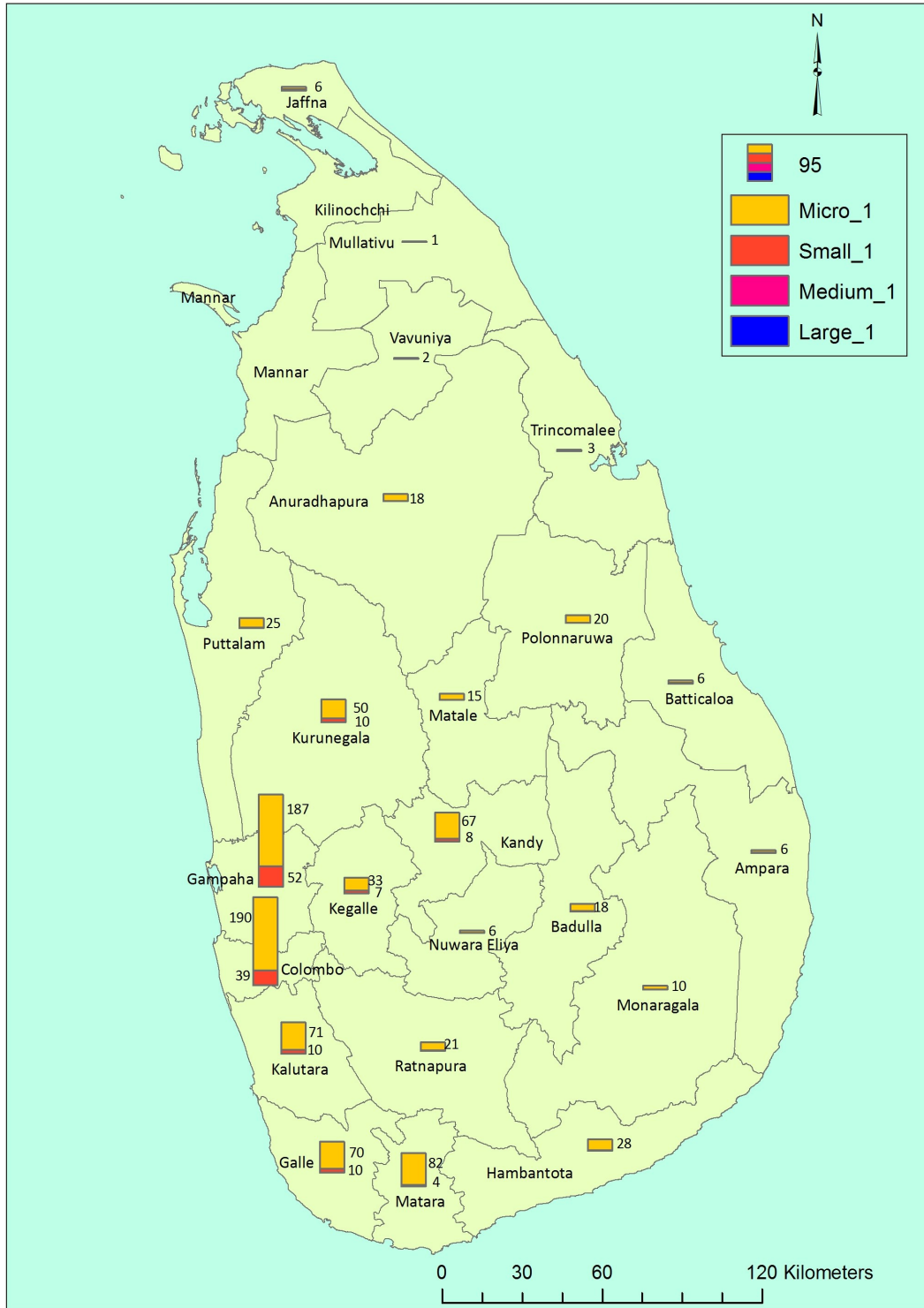
The diversification of product mix manufactured by the micro and small enterprises for emerging new markets is remarkable whilst medium and large enterprises are limiting their manufacturing only for few products demanded in existed large markets. The micro and small enterprises always acts as a market creator in the industry. Therefore, the government should promote and incentivize new investments in the micro and small industries which support to build up large companies in future.

Figure 4: Major Manufacturing Establishments of Bags, School bags, Purse & Suitcases of any material by District in Sri Lanka



Source: Department of Census and Statistics

Figure 5: Major Manufacturing Establishments of Leather Footwear by District in Sri Lanka

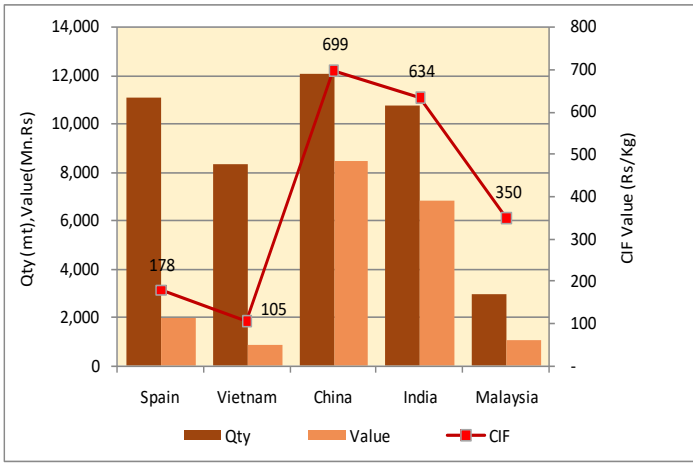


Source: Department of Census and Statistics

Table 15: Leather, Footwear, and Leather products Imports (2019-2021)

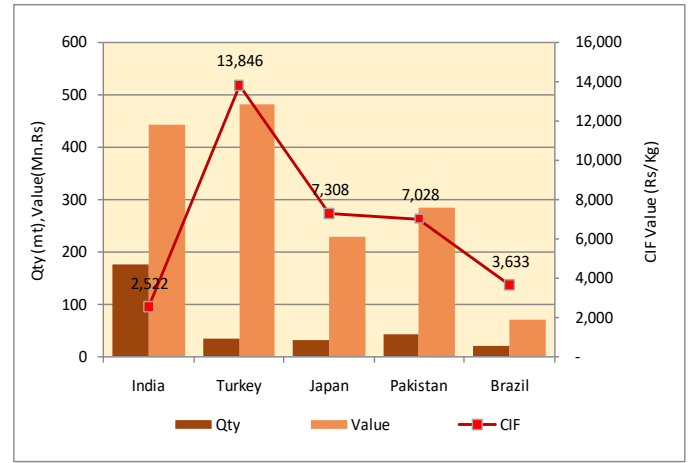
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other coloring matter; paints & varnishes; putty & other mastics; inks	MT	50,070	27,644	47,732	25,776	61,551	36,106
Raw hides and skins (other than furskins) and leather	MT	654	2,742	563	2,344	330	1,806
Articles of leather, saddlery & harness; travel goods, handbags & similar containers; articles of animal gut (other than silk-worm gut)	MT	954	1,055	412	701	484	928
Articles of leather, saddlery & harness; travel goods, handbags & similar containers; articles of animal gut (other than silk-worm gut)	('000) No	3,914	977	740	275	732	441
Furskins & artificial fur; manufacturers thereof	MT	7	118	4	84	6	146
Furskins & artificial fur; manufacturers thereof	('000)pairs	4,774	4,875	-	-	-	-
Footwear, gaiters & the like; parts of such articles	MT	1,414	513	-	-	767	321
Footwear, gaiters & the like; parts of such articles	('000)pairs	6,214	5,427	3,147	3,611	2,460	3,318
Total	MT	53,100	32,073	48,713	28,906	63,140	39,310
Total	('000) No	3,914	977	740	275	732,085	441
Total	('000)pairs	10,989,118	10,303	3,147	3,611	2,460,734	3,318
Grand Total			43,353		32,792		43,069

Source: Sri Lanka Customs



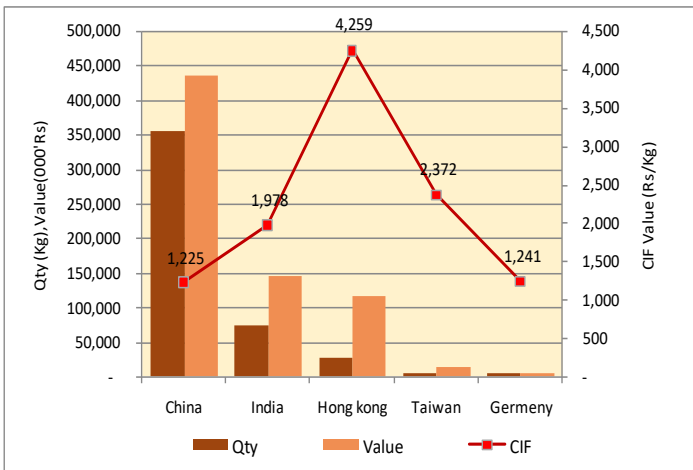
Source: Sri Lanka Customs

Figure 6: Major Import Countries of Tanning or dyeing extracts; tannins and their derivatives - 2021



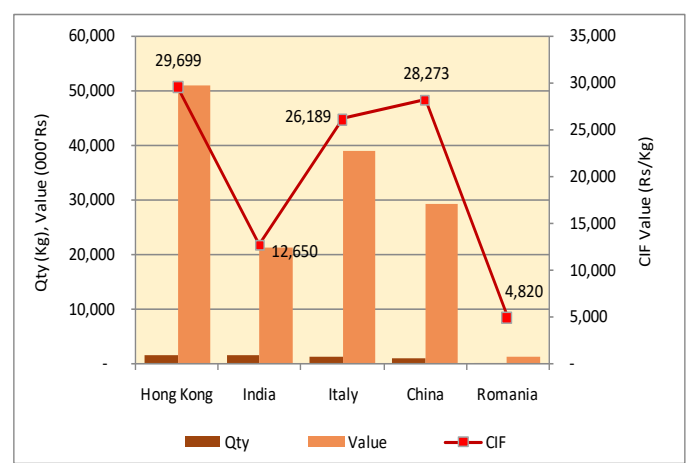
Source: Sri Lanka Customs

Figure 7: Major Import Countries of Raw hides and skins - 2021



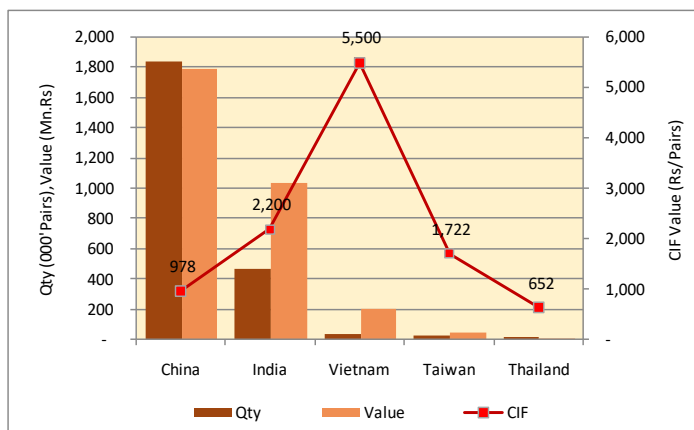
Source: Sri Lanka Customs

Figure 8: Major Import Countries of Articles of Leather, Saddlery & Harness - 2021



Source: Sri Lanka Customs

Figure 9: Major Import Countries of Furskins & artificial - 2021



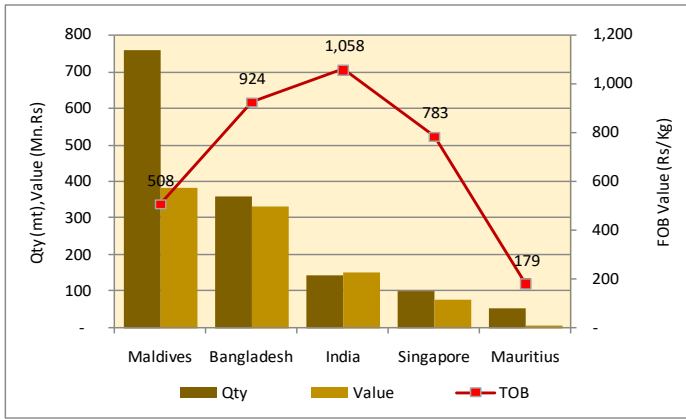
Source: Sri Lanka Customs

Figure 10: Major Import Countries of Footwear, Gaiters and the like; parts of such articles - 2021

Table 16: Leather, Footwear, and Leather Products Exports (2019-2021)

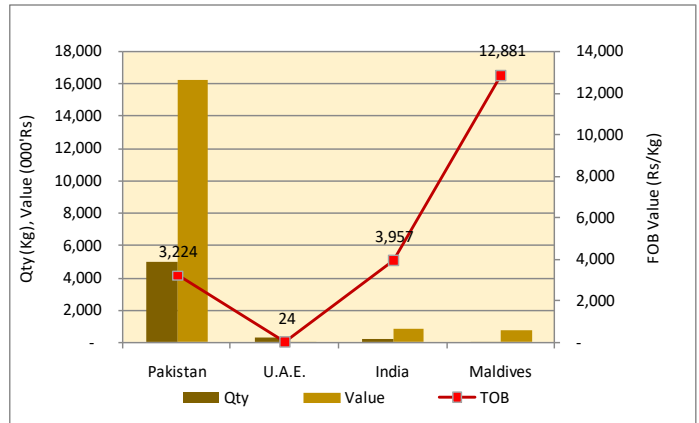
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Tanning or dyeing extracts; tannins and their derivatives; dyes, pigments and other coloring matter; paints & varnishes; putty & other mastics; inks	MT	2,654	1,350	1,709	848	2,061	1,630
Raw hides and skins (other than furskins) and leather	MT	4	17	1	4	5	17
Articles of leather, saddlery & harness; travel goods, handbags & similar containers; articles of animal gut (other than silk-worm gut)	MT	580	6,014	232	2,167	306	2,864
Articles of leather, saddlery & harness; travel goods, handbags & similar containers; articles of animal gut (other than silk-worm gut)	('000) No	693	462	414	471	6,840	541
Furskins & artificial fur; manufacturers thereof	MT	0.14	0.47	-	-	0.28	2
Footwear, gaiters & the like; parts of such articles	('000) pairs	-	-	3,703	4,133	3,134	2,785
Total	MT	3,239	7,382	1,942	3,019	2,373	4,514
Total	('000) No	693	462	414	471	6,840	541
Total	('000) pairs	-	-	3,703	4,133	3,134	2,785
Grand Total			7,844		7,623		7,840

Source: Sri Lanka Customs



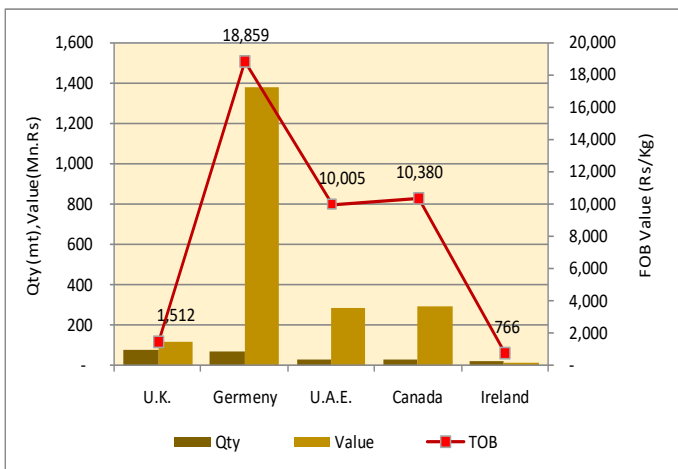
Source: Sri Lanka Customs

Figure 11: Major Export Countries of Tanning or Dying Extracts - 2021



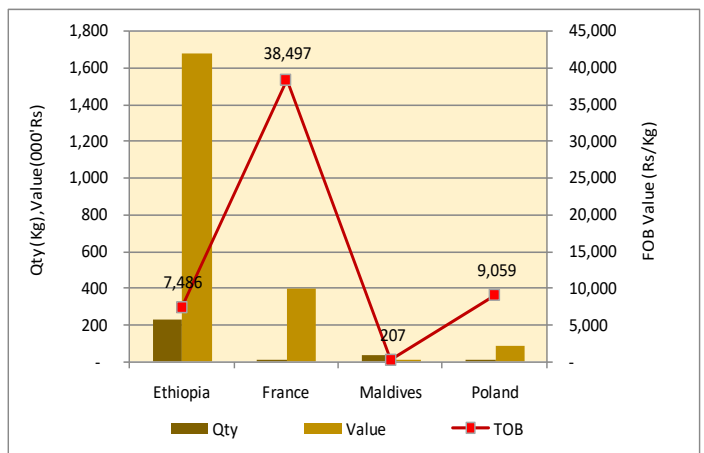
Source: Sri Lanka Customs

Figure 12: Major Exports Countries of Raw hides and Skins and Leather - 2021



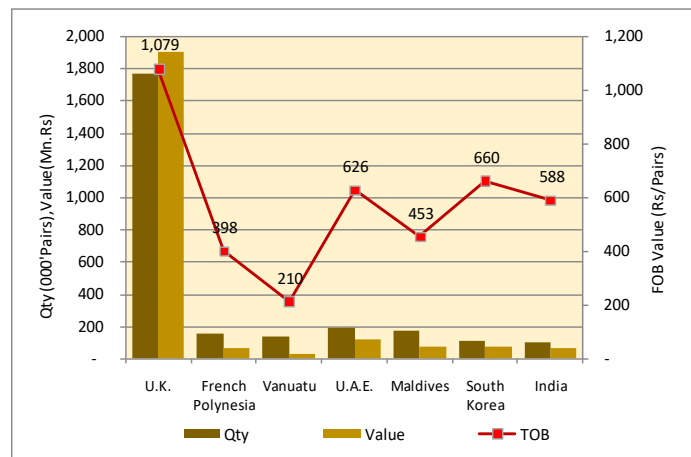
Source: Sri Lanka Customs

Figure 13: Major Exports Countries of Articles of Leather, Saddler & Harness - 2021



Source: Sri Lanka Customs

Figure 14: Major Exports Countries of Friskin's & artificial Fur Manufacturers thereof - 2021



Source: Sri Lanka Customs

Figure 15: Major Exports Countries of Footwear, gaiters and the part of such articles - 2021

The export of high quantities of final products and re-export of raw and intermediate products with a value addition at higher FOB prices for the European union and UK made a positive surplus of exports during the period. However re-exports of raw and intermediate without value addition at lower FOB prices was led to diminish the gross proceeds of exports during the period.

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