

INDUSTRY DATA BOOK

2021



TEXTILE AND APPAREL SECTOR



MINISTRY OF INDUSTRIES

**TEXTILE AND
APPAREL
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

**TEXTILE AND
WEARING APPAREL
INDUSTRY**

1. TEXTILE INDUSTRY

Overview

Textile and Wearing apparel industry has been Sri Lanka's largest gross export earner since 1986 and accounted for more than 52% of total export earnings of the country. It is also the country's largest net foreign exchange earner since 1992.

Over three decades Sri Lanka has been supplying to global super brands and the industry keeps a notable partnership portfolio with top global brands such as Gap, Liz Claiborne, Next, Jones New York, Nike, Tommy Hilfiger, Pink, Triumph, Ann Taylor, Speedo, Abercrombie & Fitch, Land's End, Marks & Spencer and Intimissimi. Sri Lankan Apparel products can be categorized as Sportswear, Lingerie, Loungewear, Bridal wear, Work wear, Swimwear and Children's wear.

Total value of apparel exports stands at USD 5.63 billion by the end of 2021. Apparel Sector Contributed 45.17% to total merchandise exports in year 2021. Earnings from the merchandise exports increased by 21 per cent year over year (YoY) from USD 4.65 billion in 2020 to USD 5.63 billion in 2021. This is while receiving USD 2.34 billion from USA, the largest buyer for Sri Lanka apparel. Apparel sector contribution to GDP stands at approximately 7%.

There are around 300 manufacturers of apparel in the sector. The industry provides direct employment for about 350,000 people and indirect employment for about 1.0 million people in support activities which include a substantial number of women in Sri Lanka. Apparel sector imports accounts to USD 2.22 billion in 2021. The imports have been declined by around 8.6% compared to imports in 2020 due to the measures taken by the government to temporarily suspend the imports.

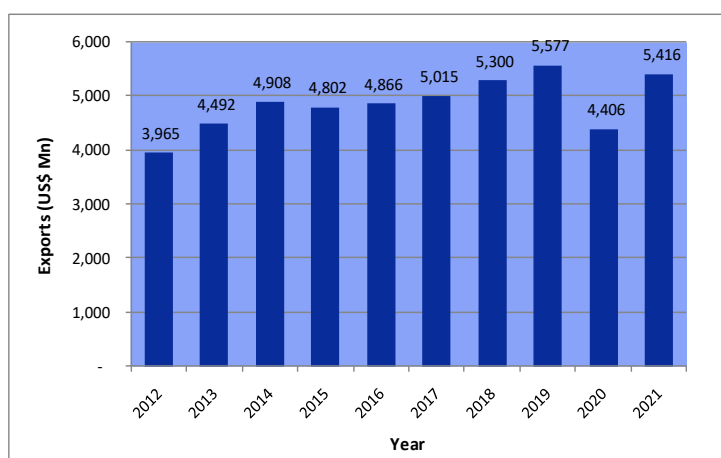
However, there are opportunities for the clothing industry to secure further advances. In particular, Sri Lanka has already made gains in the EU import market following the reinstatement of its GSP+ status under the EU's General Scheme of Preferences (GSP).

Textile sector is significant in Sri Lanka's apparel value chain for both domestic consumption and exportation. The sector supplies textile for the manufacture of export apparel. The textile mills in Sri Lanka divide as knitting and weaving handlooms and power looms are coming under the wearing industry. The handloom textile is a cottage industry in the country that serves a valuable niche in the export market. Fabric and curtaining, Dress fabric, Bed linen, Table linen, Kitchen linen, Readymade garments, Soft toys and Hand-woven rugs and tapestries are the main handloom products. A variety of textile manufactured in Sri Lanka fall into Single Jersey Fabric, Interlock Fabric, Fleece Fabric, Pique Fabric, Lacoste Fabric, French Terry Fabric, Cuff Fabric and Flat Knitted Fabric. Textile exports amounted to USD 0.43 billion in 2021.

In the textile industry there has been a sharp decline in the number of manufacturing facilities but in the apparel industry there has been significant expansion over the years, at least in terms of output. Success in clothing has been based on Sri Lanka's growing reputation in international markets as a reliable supplier of competitively priced high quality products, and the establishment of strong and enduring links with Western brands and retailers.

Looking ahead, Sri Lanka faces growing competition in Western markets from other Asian suppliers. Taken as a whole the South Asian region accounts for a 17% market share of US apparel imports and this figure is increasing on an annual basis. The large labour force and textile resources means that there is continually growing capacity available in the region, and the rapid emergence of the domestic apparel retail market has created a new market for both global brands and factories that supply to them.

Figure 1.1: Exports Value of Apparel Industry



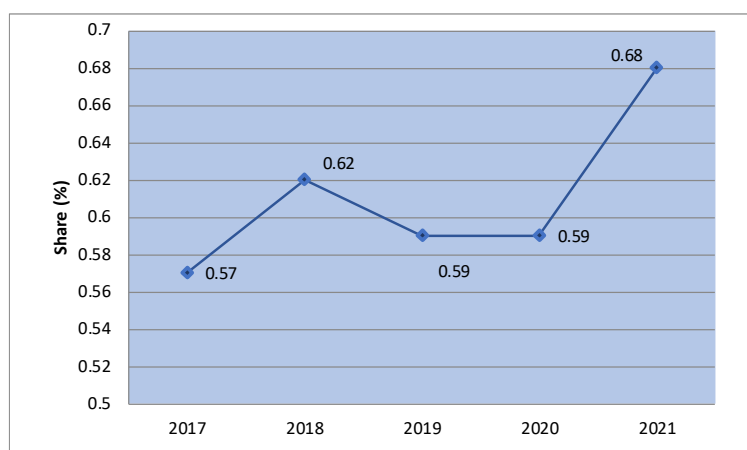
Source; Export Development Board

Table 1.1: Manufacture of Textile Sector 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 Current GDP
2017	76,610	0.57	58,341	0.62
2018	88,601	0.62	60,901	0.63
2019	88,812	0.59	58,937	0.60
2020	88,177	0.59	59,405	0.62
2021	114,210	0.68	68,429	0.69

Source : Department of Census and Statistics

Figure 1.2: The Contribution of the Textile sector to the share of the manufacturing industry to the GDP



Source : Department of Census and Statistics

Table 1.2: Textile Sector Manufacturing Establishments (2015-2019)

Year	Establishments less than 25 persons engaged		Establishments 25 or more persons engaged	
	No of Establishments	Persons engaged	No of Establishments	Persons engaged
2015	1,530	25,834	332	30,184
2016	1,605	23,085	428	36,248
2017	977	10,796	527	42,010
2018	1,818	15,473	427	46,705
2019	1,617	13,487	322	40,716

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

Table 1.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Textile 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	357	2,300	1,764	390,141,877	1,135,371,217	366,141,710	769,229,508	44,676,197
10 to 99	1,448	38,043	36,313	7,361,389,518	49,961,757,475	26,918,471,151	23,043,286,324	2,770,841,045
100 & above	56	15,674	15,639	4,019,504,831	70,813,774,447	45,195,066,409	25,618,708,038	4,223,374,156
Group total	1,861	56,017	53,716	11,771,036,226	121,910,903,139	72,479,679,270	49,431,223,870	7,038,891,398

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

Table 1.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Textile 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	430	2,489	1,611	253,362,110	859,112,078	395,185,232	463,926,846	11,187,200
10 to 99	1,532	37,473	35,195	6,486,261,423	74,427,016,596	44,874,254,443	29,552,762,153	1,288,660,510
100 & above	71	19,371	19,328	6,464,524,942	71,605,100,118	46,441,102,954	25,163,997,164	4,091,217,016
Group total	2,033	59,333	56,134	13,204,148,475	146,891,228,792	91,710,542,629	55,180,686,163	5,391,064,726

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

Table 1.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Textile 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	546	3,557	2,564	479,249,694	1,523,696,000	873,857,501	649,838,499	1,665,045
10 to 99	886	28,682	27,788	6,476,604,229	70,207,074,439	43,065,839,052	27,141,235,386	4,421,776,876
100 & above	73	20,568	20,518	7,710,406,187	91,128,405,606	58,021,699,934	33,106,705,672	5,224,182,055
Group total	1,505	52,807	50,870	14,666,260,110	162,859,176,045	101,961,396,487	60,897,779,557	9,647,623,976

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

Table 1.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Textile 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	1,357	8,743	6,986	1,363,564,067	22,168,052,363	13,706,496,418	16,974,631,441	376,929,914
10 to 99	775	23,834	23,043	6,444,270,695	43,157,851,361	26,183,219,920	16,974,631,441	376,929,914
100 & above	114	29,601	29,505	11,540,396,262	119,322,814,631	73,726,348,427	45,590,466,204	6,022,313,699
Group total	2,246	62,178	59,534	19,348,231,024	184,648,718,355	113,616,064,765	79,539,729,086	6,776,173,527

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

Table 1.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Textile Industry (2019) - (Establishments with 5 or more engaged)

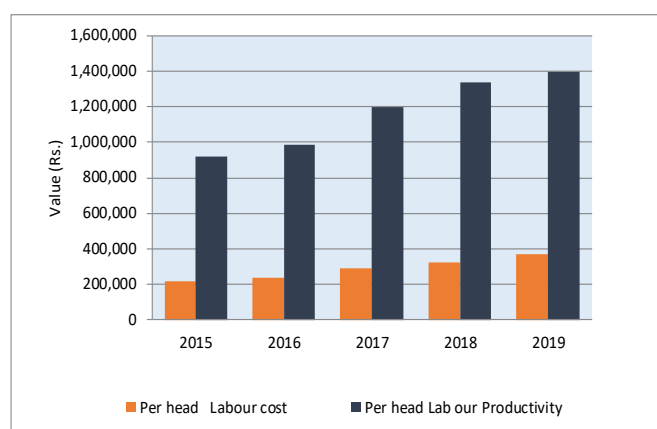
2019								
Year	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	1,110	6,906	5,019	1,081,437,721	5,246,890,320	2,307,642,702	2,939,247,618	10,630,307
10 to 99	741	17,754	17,001	5,175,661,330	39,925,535,130	22,999,116,814	16,926,418,316	1,248,212,140
100 & above	87	29,543	29,479	12,858,269,465	154,314,084,170	102,310,017,203	52,004,066,968	7,065,281,869
Group total	1,938	54,203	51,499	19,115,368,516	199,486,509,620	127,616,776,719	71,869,732,902	8,324,124,316

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

Table 1.8: Manufacturing of Textile Industry Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	219,135	920,233	419.94
2016	235,226	983,017	417.90
2017	288,309	1,197,126	415.22
2018	324,995	1,336,039	411.10
2019	371,179	1,395,556	375.98

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



Source : Department of Census and Statistics

Figure 1.3: Manufacturing of Textile Per head Labour Productivity

Labour Cost to Productivity Ratio of the Apparel sector has decreased to 375 in 2019 from 411 recorded in 2018.

Table 1.9: Value of Output & Output Components Classified by Textile Industry - (Establishments 25 or more engaged)

Year	Output (Rs.)	Shipped (Rs)/ products moved of the establishment (Rs.)	Change in Stocks (Rs.)	Industrial services & other revenue (Rs.)
2015	104,668,308,959	101,505,685,605	156,644,007	3,005,979,347
2016	130,810,663,029	130,262,193,063	-775,751,254	1,324,221,220
2017	153,703,856,832	152,205,609,358	-674,203,833	2,172,451,357
2018	152,894,585,627	149,646,962,176	1,551,840,869	1,695,782,582
2019	182,850,490,430	180,113,362,604	806,591,409	1,930,536,418

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

Table 1.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Textile Industry - (Establishments with 25 or more persons engaged)

Year	Intermediate consumption (Rs.)	Raw materials consumed (Rs.)	Cost of industrial services done by others & other payments (Rs.)	Electricity & fuel consumed (Rs.)
2015	63,044,986,998	50,616,495,675	8,504,632,305	3,923,859,019
2016	84,697,263,308	68,769,432,936	8,003,588,880	7,924,241,491
2017	96,969,478,063	78,023,088,253	9,133,684,691	9,812,705,119
2018	93,671,154,190	77,261,344,918	10,157,480,578	6,252,328,694
2019	119,510,185,412	101,269,186,058	10,911,750,314	7,329,249,040

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

Table 1.11: Employment by Nature of Employment & Gender Classified by Textile Industry Division - (Establishment with 25 or more persons engaged)

Year	Working Proprietors (No)		Unpaid family workers (No)		Operatives (No)		Other employees (No)		Total persons engaged	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
2015	135	125	4	8	9,933	13,952	4,500	1,526	14,572	15,612
2016	243	180	4	5	13,805	15,101	5,187	1,722	19,240	17,008
2017	288	193	36	9	14,119	19,289	5,932	2,145	20,374	21,636
2018	277	107	50	131	16,060	21,320	5,999	2,760	22,387	24,318
2019	136	55	50	50	15,792	17,436	5,195	2,002	21,172	19,543

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

Table 1.12: Economic Indicators of Textile Industrial Activity Classified by Industry Class - (Establishments less than 25 persons engaged)

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	667,443	1.828	2.598	302,236	0.828	1.176
2016	696,578	2.293	1.272	392,777	1.293	0.717
2017	848,023	1.834	0.203	385,640	0.834	0.092
2018	2,052,229	1.592	2.362	763,215	0.592	0.878
2019	1,233,477	2.052	1.575	632,414	1.052	0.807

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

Table 1.13: Economic Indicators of Textile Industrial Activity Classified by Industry Class - (Establishments with 25 or more persons engaged)

Table 1.13.1: Spinning, Wearing and Finishing of Textiles

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
2016	3,772,146	1.505	2.900	1,265,942	0.505	0.973
2017	3,698,201	1.540	2.591	1,427,279	0.540	0.908
2018	3,221,334	1.571	2.852	1,170,185	0.571	1.036
2019	4,579,658	1.516	3.250	1,559,611	0.516	1.107

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

Table 1.13.2: Manufacture of Other Textiles

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
2016	2,883,236	1.821	1.701	1,299,802	0.821	0.767
2017	3,500,222	1.812	1.590	2,200,749	0.812	0.713
2018	3,365,288	1.748	1.749	1,439,559	0.748	0.748
2019	4,341,615	1.555	1.872	1,549,059	0.555	0.668

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

Table 1.14: Categories of Employees by Nature of Employment Classified by Industry - (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	29,912	14,988	8,897
2016	35,815	20,033	8,873
2017	41,485	23,677	9,731
2018	46,140	28,470	8,911

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

Table 1.15: Number of Manufacturing of Textile Industries and Engaged Persons in Sri Lanka (2013/14 Economic Census)

1.15.1: Preparation and Spinning of Textile Fibers

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
Preparatory operations and spinning of cotton and cotton mix yarn	31	49	5	62	-	-	1	460
Preparatory operations and spinning of other yarn	12	25	2	10	-	-	-	-
manufacture of sewing treads	27	49	9	101	5	254	1	245
preparation of coir fibre (Coir Mill)	2,022	5,033	817	6,504	76	4,213	8	2,539
Total	2,092	5,156	833	6,677	81	4,467	10	3,244

Source : Department of Census and Statistics

1.15.2: Weaving of Textiles

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
Handloom Weaving	582	1,004	118	1,087	16	954	2	2,307
Power loom Weaving	131	231	40	355	10	586	1	1,046
Manufacture of Gauze	76	162	27	265	4	290	-	-
Total	789	1,397	185	1,707	30	1,830	3	3,353

Source : Department of Census and Statistics

1.15.3: Finishing of Textiles

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
Bleaching and dyeing of textile, fabrics, yarn, fibers or garments	31	61	10	85	10	539	3	1,363
Batik industry	328	587	51	477	6	397	-	-
Finishing of textiles other than bleaching and dyeing	5	9	7	91	1	152	-	-
Water proofing, coating, rubberizing or impregnating of garments	2	5	1	7	-	-	-	-
Pleating and similar work on textile	6	8	-	-	1	43	-	-
Silk-screen printing on textiles and wearing apparel	193	328	54	522	13	853	8	3,061
Finishing of Textiles n.e.c	113	150	18	181	5	284	4	1,105
Total	678	1,148	141	1,363	36	2,268	15	5,529

Source : Department of Census and Statistics

1.15.4: Manufacture of Knitted and Crocheted Fabrics

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
Manufacture and processing of knitted and crocheted fabrics	258	282	3	34	2	155	3	1,769
Total	258	282	3	34	2	155	3	1,769

Source : Department of Census and Statistics

1.15.5: Manufacture of Made-up Textile Articles, except Apparel

Industry	Micro		Small		Medium		Large	
	No. of stab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of bed sheets and towels	196	236	22	226	5	185	-	-
Manufacture of curtains, furniture or machine covers, dish cloths, life jackets, parachutes etc.	579	796	14	108	2	75	1	395
Manufacture of hand-woven tapestries	16	35	7	91	1	40	-	-
Manufacture of blankets, travelling rugs, table linen, kitchen linen, cushions covers and pillow cases, textile	848	1,119	34	256	1	40	-	-
Manufacture of flags, banners	101	150	5	29	1	35	-	-
Manufacture of Tents	611	766	10	71	3	139	-	-
Manufacture of other made-up textile articles, except apparel n.e.c.	1,388	1,643	24	158	9	570	2	2,288
Total	3,739	4,745	116	939	22	1,084	3	2,683

Source : Department of Census and Statistics

1.15.6: Manufacture of Carpets and Rugs

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
Manufacture of carpets	116	136	4	64	1	120	-	-
Manufacture of rugs	3,092	3,493	24	210	2	79	-	-
Manufacture of mats (Reeds and Other)	2,097	2,493	20	167	-	-	-	-
Manufacture of other floor coverings, fertilizer packing bags etc	39	57	1	5	-	-	-	-
Total	5,344	6,179	49	446	3	199	-	-

Source : Department of Census and Statistics

1.15.7: Manufacture of Twine, Cordage, Rope and Cables of Coir Fibers

Industry	Micro		Small		Medium		Large	
	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE	No. of Estab.	No. of PE
Manufacture of cordage, rope and cables of coir fibres	1,785	3,875	132	1,159	18	954	-	-
Manufacture of twine, cordage, rope and cables of textile or other fibres	53	119	4	35	2	130	-	-
Manufacture of knotted netting of twine, cordage or rope of coir	123	233	4	28	-	-	-	-
Manufacture of knotted netting of twine, cordage or rope of other textile	95	229	2	17	-	-	-	-
Manufacture of fishing nets	55	74	4	21	2	80	1	270
Total	2,111	4,530	146	1,260	22	1,164	1	270

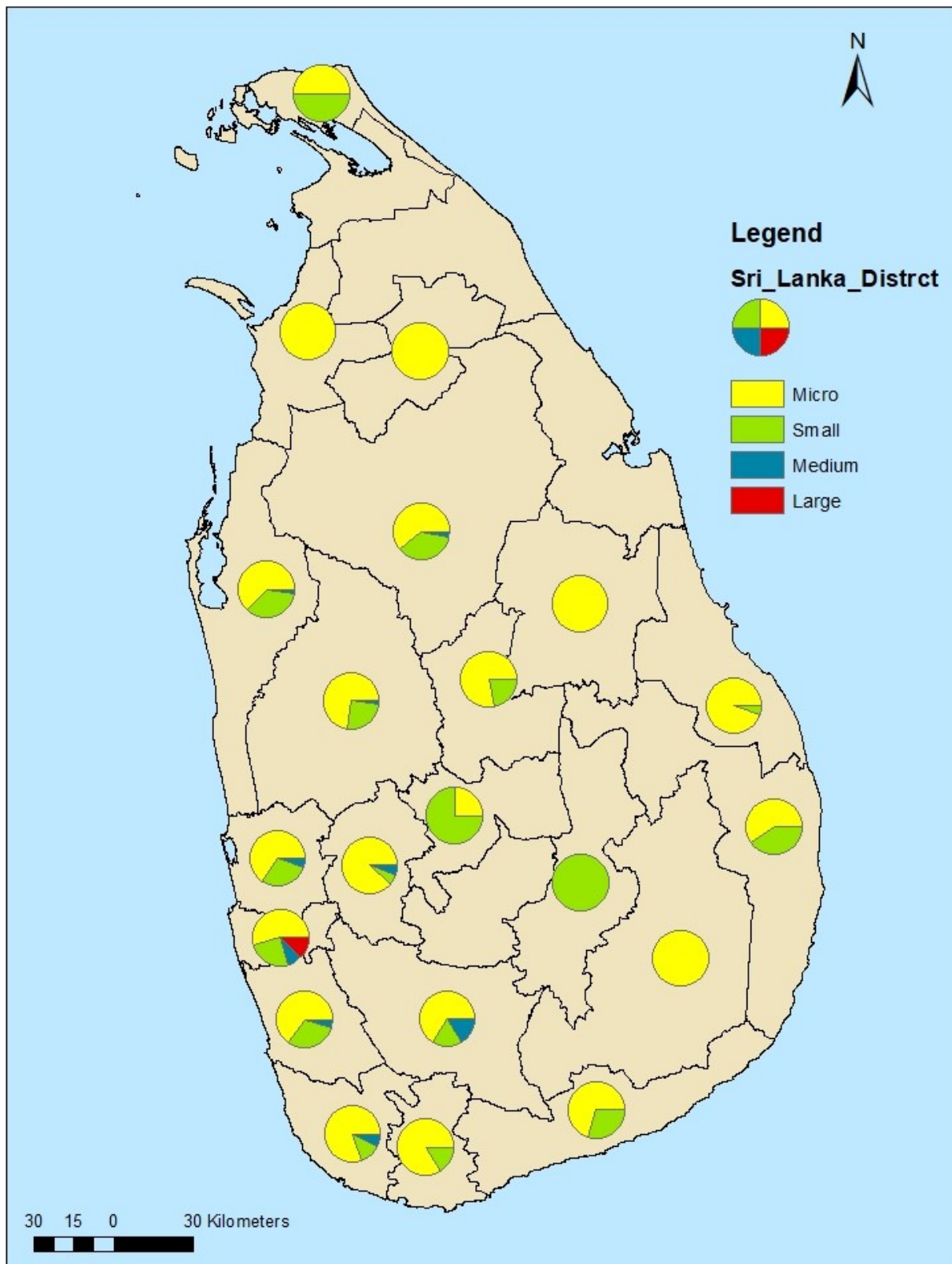
Source : Department of Census and Statistics

1.15.8: Manufacture of Other Textile

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
Manufacture of narrow woven fabrics such as ribbons	19	26	-	-	-	-	-	-
Manufacture of labels, badges etc.	41	73	7	63	14	1,035	3	1,419
Manufacture of ornamental trimmings	132	193	10	99	3	195	-	-
Embroidery works	173	353	61	605	20	1,141	4	1,315
Manufacture of fabrics impregnated coated or laminated with plastics	8	10	1	5	-	-	-	-
Manufacture of lace	3	5	2	5	-	-	1	578
Manufacture net fabrics (for Mosquito nets)	86	98	1	6	-	-	-	-
Manufacture of other textile n.e.c.	398	468	10	105	4	170	1	343
Total	860	1,226	92	888	41	2,541	9	3,655

Source: Department of Census and Statistics

Figure 1.4: Major Manufacturing Establishments of Textile Sector by District in Sri Lanka

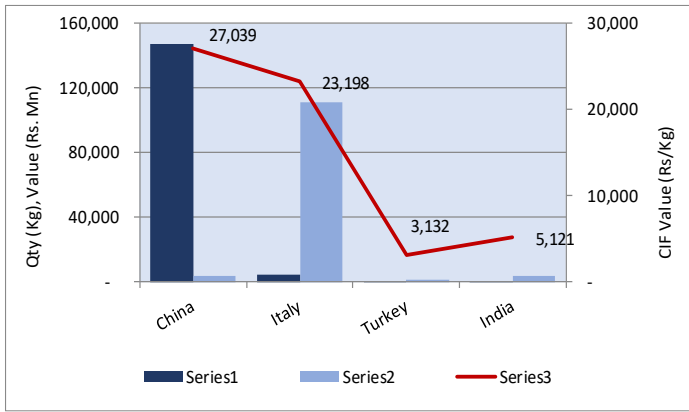


Source: Department of Census and Statistics

Table 1.16: Textile Imports (2019-2021)

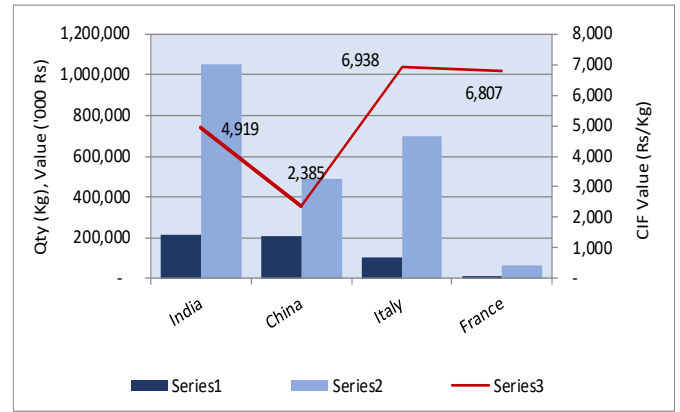
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Silk	MT	287	4,447	132	2,631	153	4,097
Wool, fine or coarse animal hair; horse-hair yarn and woven fabric	MT	495	1,424	484	1,661	569	2,553
Cotton	MT	103,687	117,290	84,440	93,800	103,963	127,733
Other vegetable textile fibers; paper yarn and woven fabrics of paper yarn	MT	3,367	4,777	4,154	4,335	3,718	5,212
Man-made filaments; strip and the like of man -made textile materials	MT	46,447	49,475	44,908	45,753	63,306	78,738
Man-made staple fibers	MT	101,568	92,719	87,740	70,867	72,133	79,515
Wadding, felt & nonwovens special yarns; twine, cordage,ropes & cables & articles thereof	MT	12,083	9,066	11,532	9,355	16,222	14,179
Carpets and other textile floor coverings	('000) Sq. Meters	7,271	1,612	3,614	1,180	3,990	1,382
Special woven fabric; tufted textile fabrics;lace;tapestries;trimings;embroidery	MT	18,334	50,242	14,393	39,660	17,499	53,817
Impregnated, coated,covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	MT	16,162	11,450	13,980	12,802	17,216	19,310
Impregnated, coated,covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	('000) Sq. Meters	0	1	5,899	7,570	15	25
Total	MT	302,431	340,890	261,765	280,864	294,780	385,153
Total	('000) Sq. Meters	7,271	1,613	9,513	8,750	4,004	1,406
Grand Total			342,502		289,614		386,560

Source: Sri Lanka Customs



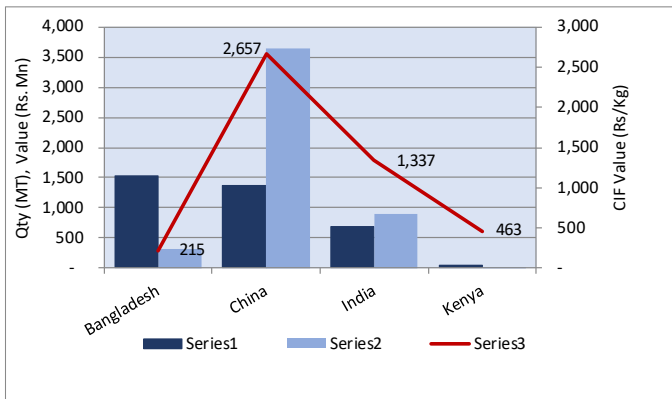
Source: Sri Lanka Customs

Figure 1.5: Major Import Countries of Silk-2021



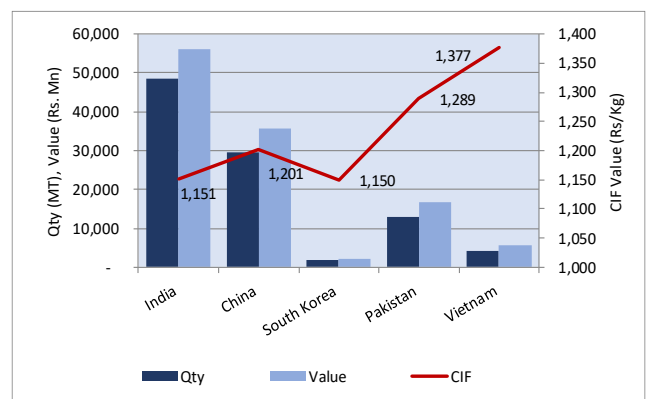
Source: Sri Lanka Customs

Figure 1.6: Major Import Countries of Wool, fine, or coarse animal hair; horse hair yarn and woven fabric



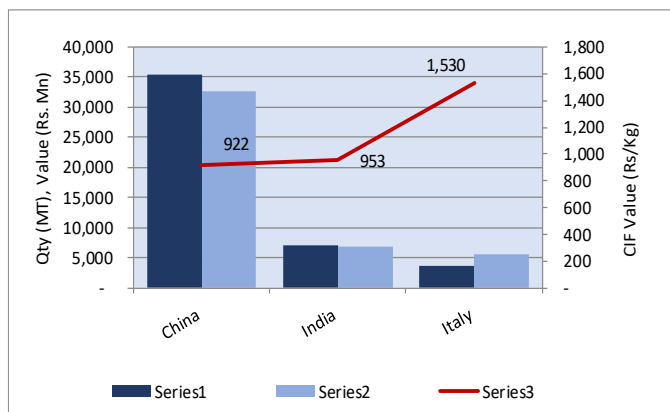
Source: Sri Lanka Customs

Figure 1.7: Major Import Countries of Cotton—2021



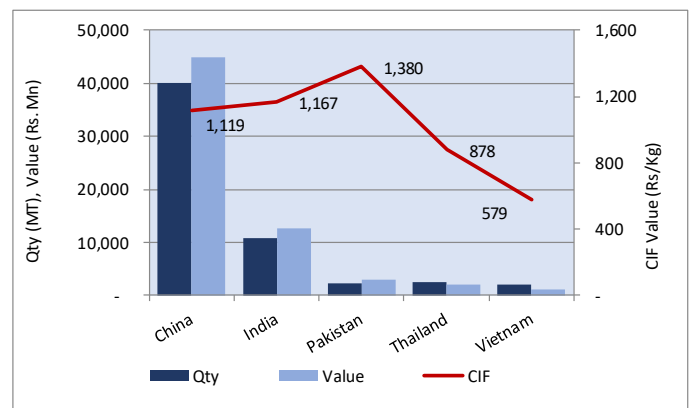
Source: Sri Lanka Customs

Figure 1.8: Major Import Countries of Other Vegetable Textile Fibers (paper yarn and woven fabrics of paper)



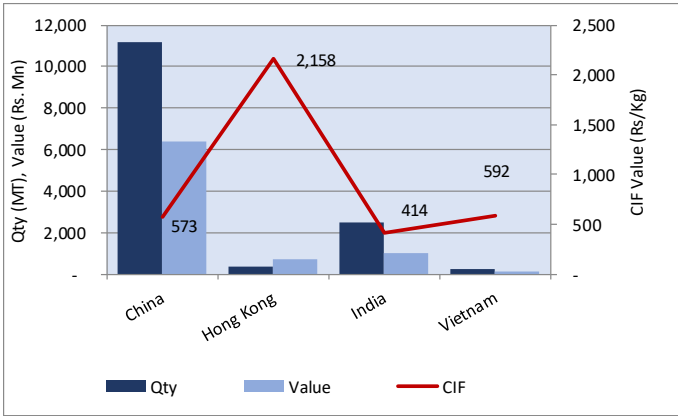
Source: Sri Lanka Customs

Figure 1.9: Major Import Countries of Man-made filaments (strip and the like of man-made textile mate-



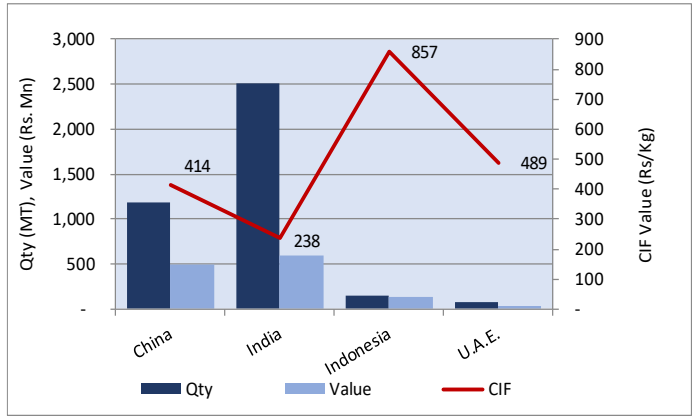
Source: Sri Lanka Customs

Figure 1.10: Major Import Countries of Man-made staple fibers - 2021



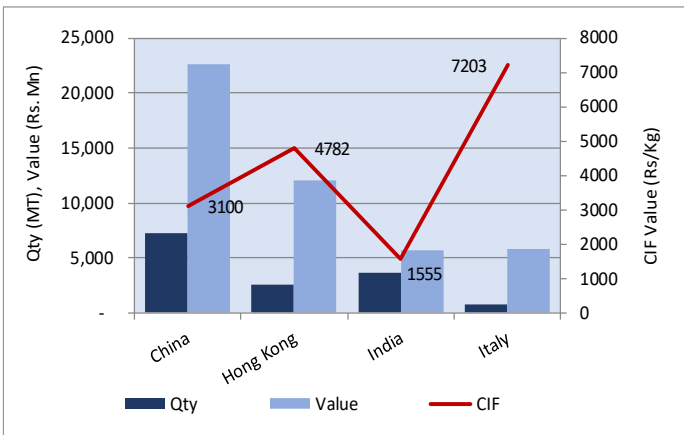
Source: Sri Lanka Customs

Figure 1.11: Major Import Countries of Wadding, felt & nonwovens special yarns (twine, cordage, ropes&



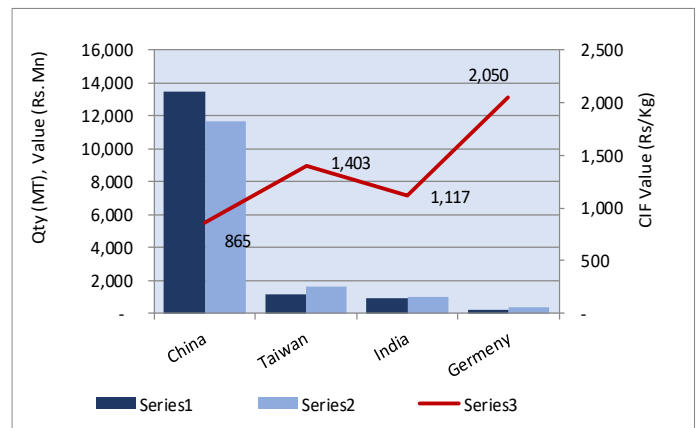
Source: Sri Lanka Customs

Figure 1.12: Major Import Countries of carpets & oth-



Source: Sri Lanka Customs

Figure 1.13: Major Import Countries of Special woven fabrics (lace, tapestries, trimmings, embroi-



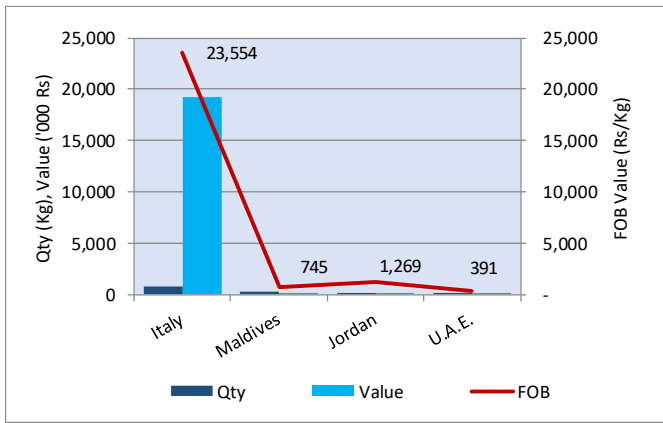
Source: Sri Lanka Customs

Figure 1.14: Major Import Countries of Textile articles of

Table 1.17: Textile Exports (2019-2021)

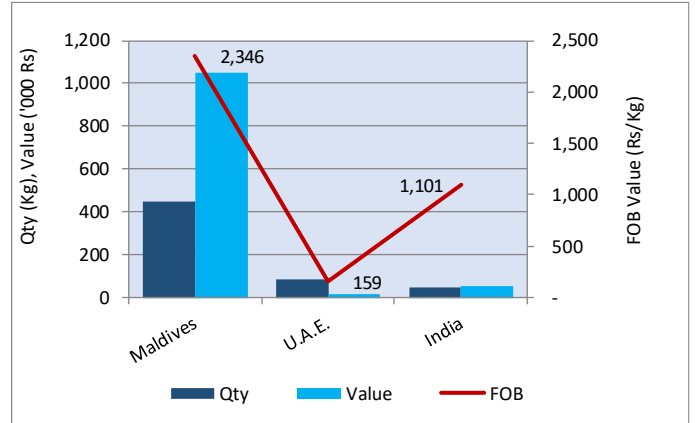
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Silk	MT	1	1	1	0.29	1	20
Wool, fine or coarse animal hair; horse-hair yarn and woven fabric	MT	1	0.39	0	1	1	1
Cotton	MT	3,248	2,471	1,915	1,897	2,992	5,317
Other vegetable textile fibers; paper yarn and woven fabrics of paper yarn	MT	374,866	29,759	420,217	33,319	467,422	43,944
Man-made filaments; strip and the like of man-made textile materials	MT	1,671	1,680	2,892	3,303	4,198	4,881
Man-made staple fibers	MT	17,019	9,570	28,706	13,746	11,198	7,042
Wadding, felt & nonwovens special yarns; twine, cordage,ropes & cables & articles thereof	MT	22,776	12,340	13,227	8,792	18,798	12,580
Carpets and other textile floor coverings	('000) Sq.Meters	1,071	1,118	939	1,265	1,030	1,611
Special woven fabric; tufted textile fabrics;lace;tapestries;trimings;embroidery	MT	2,700	10,373	1,753	6,509	2,879	12,216
Impregnated, coated,covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	MT	1,650	1,760	1,114	1,209	1,566	1,908
Impregnated, coated,covered or laminated textile fabrics; textile articles of a kind suitable for industrial use	('000) Sq. Meters	5	2	0	1	-	-
Total	MT	423,933	67,955	469,824	68,776	509,054	87,909
Total	('000) Sq. Meters	1,077	1,119	940	1,266	1,030	1,611
Grand Total			69,074		70,042		89,520

Source: Sri Lanka Customs



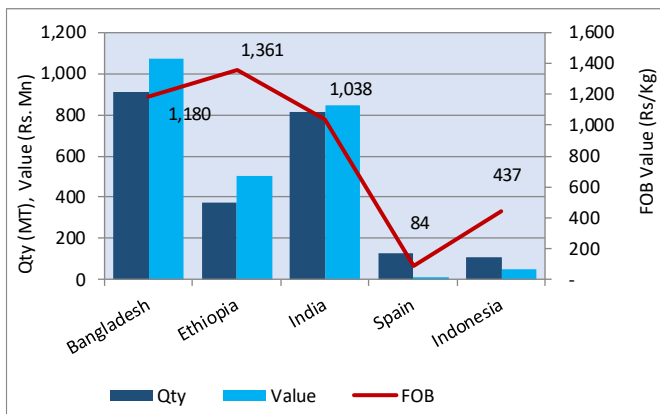
Source: Sri Lanka Customs

Figure 1.15: Major Export Countries of Silk - 2021



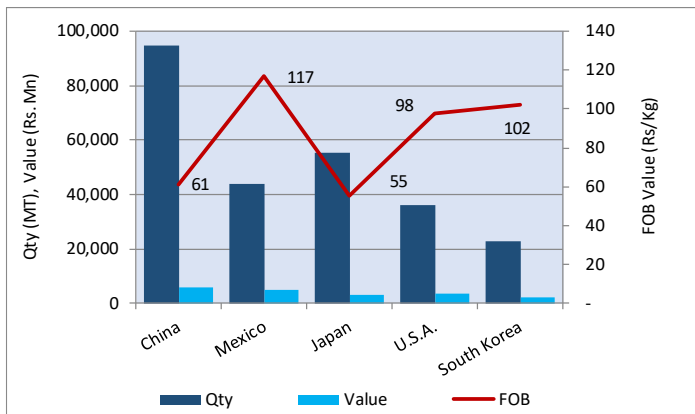
Source: Sri Lanka Customs

Figure 1.16: Major Export Countries of Wool, fine, or coarse animal hair; horse hair yarn and woven fabric - 2021



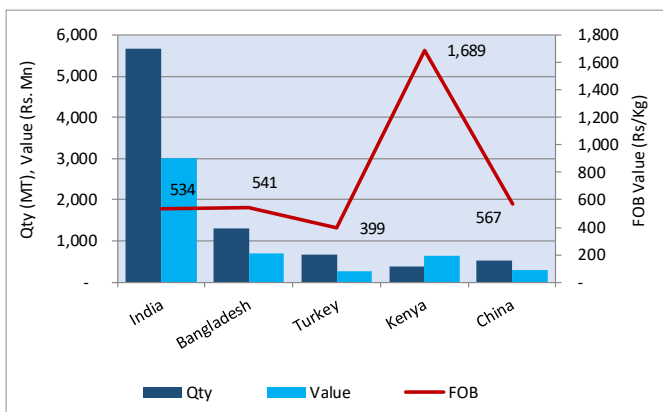
Source: Sri Lanka Customs

Figure 1.17: Major Export Countries of Cotton—



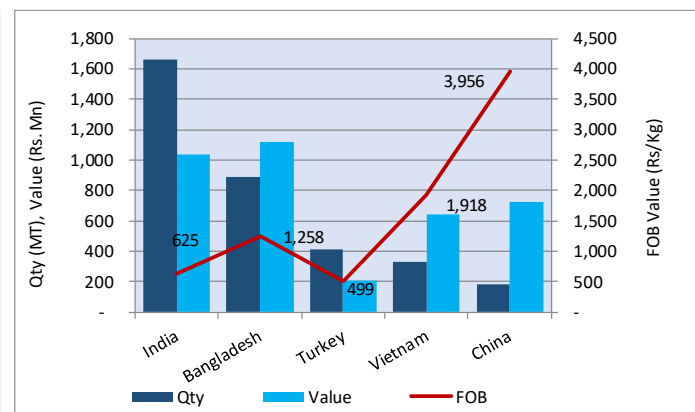
Source: Sri Lanka Customs

Figure 1.18: Major Export Countries of Other Vegetable Textile Fibers (paper yarn and woven fabrics of paper)



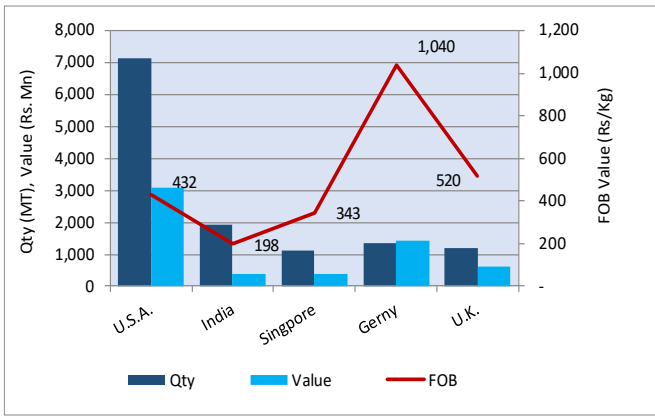
Source: Sri Lanka Customs

Figure 1.19: Major Export Countries of Man-made filaments (strip and the like of man-made textile materi-



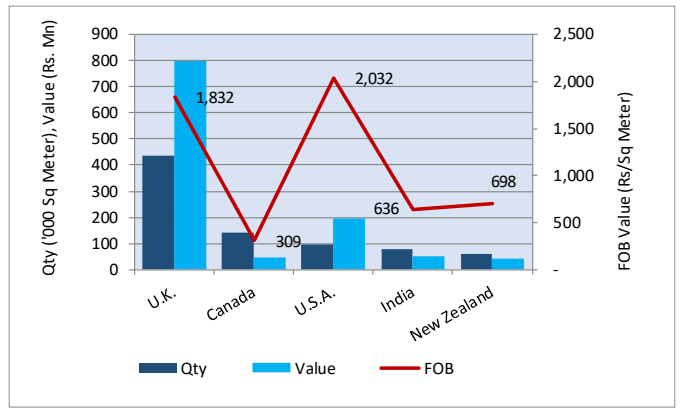
Source: Sri Lanka Customs

Figure 1.20: Major Export Countries of Man-made staple fibers - 2021



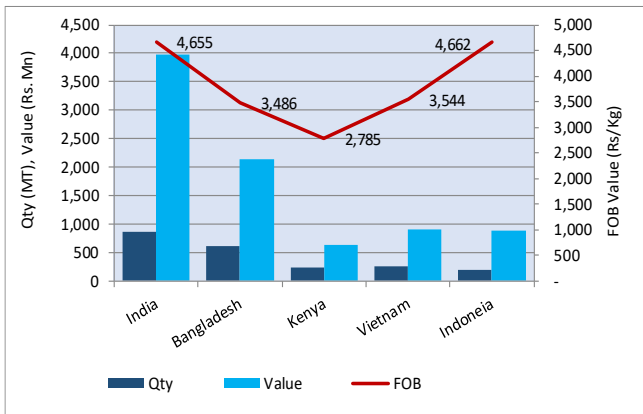
Source: Sri Lanka Customs

Figure 1.21: Major Export Countries of Wadding, felt & nonwovens special yarns (twine, cordage, ropes & cables & articles) - 2021



Source: Sri Lanka Customs

Figure 1.22: Major Export Countries of carpets & other textile floor coverings - 2021



Source: Sri Lanka Customs

Figure 1.23: Major Export Countries of Special woven fabrics (lace, tapestries, trimmings, embroidery) - 2021



Source: Sri Lanka Customs

Figure 1.24: Major Export Countries of Textile articles - 2021

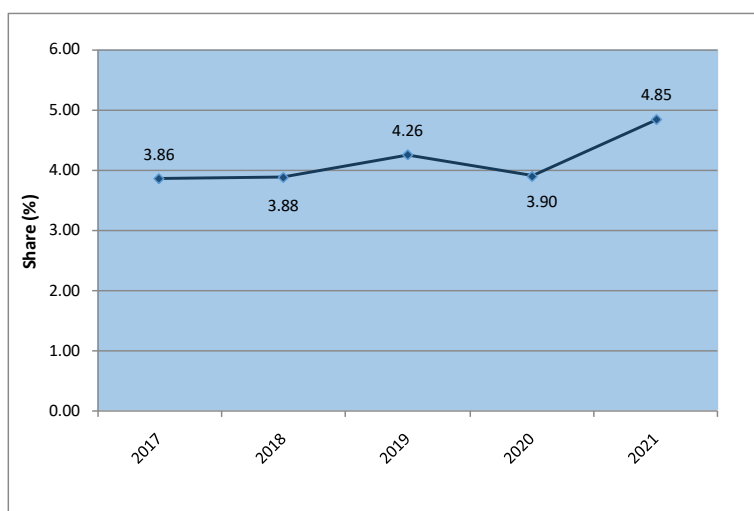
2. WEARING APPAREL INDUSTRY

Table 2.1: Manufacture of Wearing Apparel 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 (%) Total Constant GDP
2017	514,833	3.86	236,343	2.53
2018	554,919	3.88	254,777	2.64
2019	638,900	4.26	265,575	2.69
2020	586,046	3.90	220,780	2.32
2021	814,868	4.85	251,696	2.55

Source : Department of Census and Statistics

Figure 2.1: The Contribution of the Wearing Apparel Sector to the Share of the Manufacturing Industry to the GDP



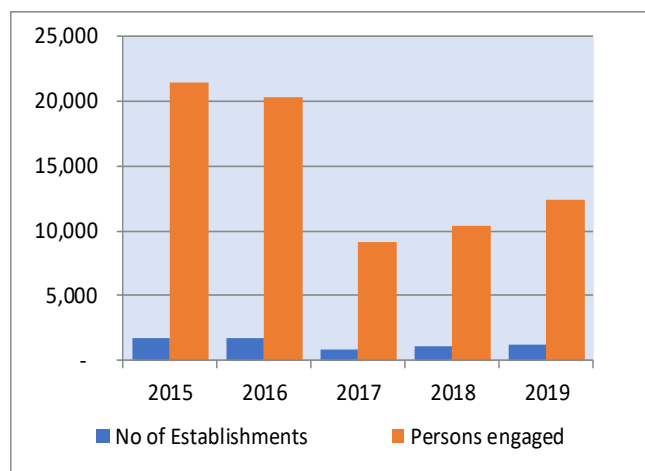
Source : Department of Census and Statistics

Table 2.2: Manufacturing Establishments of Wearing Apparel Industry (2015-2019)

Year	Establishments less than 25 persons engaged		Establishments 25 or more persons engaged	
	No of Establishments	Persons engaged	No of Establishments	Persons engaged
2015	1,745	21,409	1,679	493,774
2016	1,656	20,280	2,078	674,967
2017	891	9,154	2,246	720,273
2018	1,142	10,431	1,432	684,077
2019	1,208	12,371	1,212	685,436

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

Figure 2.2: The trend of establishments less than 25 persons engaged in Wearing Apparel industry



Source : Department of Census and Statistics

Table 2.3: Principal Indicators of Industrial Activity classified by Industry Division & Persons Engaged, Size Class of Wearing Apparel Industry (2015) — (Establishments with 5 or more persons 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	946	5,376	4,260	1,132,870,568	12,538,632,473	3,335,312,880	9,203,319,593	76,474,994
10 to 99	1,696	62,884	60,411	15,863,711,339	65,849,844,765	27,713,931,709	38,135,913,056	3,319,679,222
100 & above	781	446,922	446,685	125,388,750,325	940,651,838,758	602,158,472,629	338,493,366,129	23,366,041,596
Group total	3,423	515,182	511,356	142,385,332,232	1,019,040,315,996	633,207,717,218	385,832,598,778	26,762,195,812

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

Table 2.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Wearing Apparel Industry (2016) — (Establishments with 5 or more persons 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	661	4,252	2,726	594,357,441	1,656,851,766	656,911,081	999,940,685	36,695,262
10 to 99	2,282	83,189	81,189	18,446,335,807	146,009,391,132	80,339,605,273	65,669,785,859	950,378,603
100 & above	791	607,805	607,546	192,251,883,694	902,626,636,409	554,840,318,989	347,786,317,420	43,222,011,918
Group total	3,734	695,246	691,461	211,292,576,942	1,050,292,879,307	635,836,835,343	414,456,043,964	44,209,085,783

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

Table 2.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Wearing Apparel Industry (2017) — (Establishments with 5 or more persons 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	508	2,645	990	167,178,438	765,229,546	242,890,251	522,339,295	3,218,903
10 to 99	1,771	86,971	85,694	21,661,320,935	52,123,608,024	20,711,572,001	31,412,036,023	536,407,489
100 & above	857	639,811	639,480	207,923,364,967	1,058,629,551,480	636,822,678,885	421,806,872,595	46,199,050,484
Group total	3,136	729,427	726,164	229,751,864,340	1,111,518,389,050	657,777,141,137	453,741,247,913	46,738,676,876

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

Table 2.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Wearing Apparel Industry (2018) — (Establishments with 5 or more persons 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	845	5,153	3,448	623,131,426	3,148,502,583	1,644,570,326	1,503,932,257	387,066
10 to 99	938	38,928	38,114	10,267,257,483	47,956,570,310	28,074,772,133	19,881,798,177	583,594,384
100 & above	791	650,427	649,843	207,603,497,607	1,298,664,264,976	788,004,562,200	510,659,702,775	65,615,004,507
Group total	2,574	694,508	691,405	218,493,886,516	1,349,769,337,869	817,723,904,659	532,045,433,209	66,198,985,957

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

Table 2.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged, Size Class of Wearing Apparel Industry (2019) — (Establishments with 5 or more persons engaged)

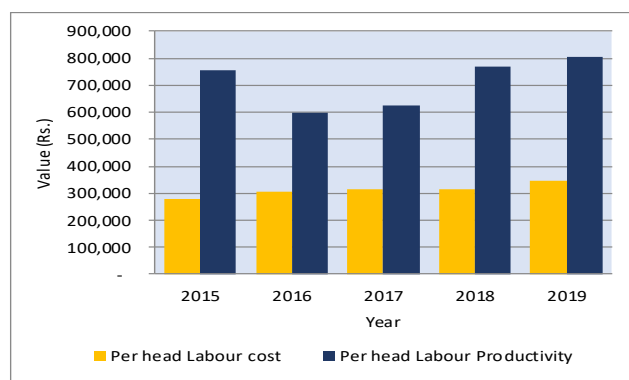
2019								
Year	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	757	5,455	3,205	670,153,599	2,977,517,546	1,325,577,791	1,651,939,756	776,574
10 to 99	862	26,967	26,247	5,886,130,069	21,600,502,344	12,228,161,841	9,372,340,503	58,646,571
100 & above	801	665,386	665,001	235,029,303,923	1,387,803,315,167	838,397,419,880	549,405,895,287	38,519,201,042
Group total	2,420	697,807	694,453	241,585,587,582	1,412,381,335,057	851,951,159,512	560,430,175,546	38,578,624,187

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

Table 2.8: Manufacturing of Wearing Apparel Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	278,447	754,528	270.98
2016	305,574	599,392	196.15
2017	316,391	624,847	197.49
2018	316,014	769,513	243.51
2019	347,879	807,010	231.98

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



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

Figure 2.3: Manufacturing of wearing Apparel Labour Productivity

Table 2.9: Value of Output & Output Components Classified by Wearing Apparel Industry - (Establishments with 25 or more persons engaged)

Year	Output (Rs.)	Shipped (Rs.)/ products moved of the establishment (Rs.)	Change in Stocks (Rs.)	Industrial services & other revenue (Rs.)
2015	975,861,756,132	880,034,645,228	921,704,645	94,905,406,260
2016	1,042,985,926,188	968,951,009,840	(151,640,550)	74,186,556,898
2017	1,107,880,028,433	997,946,799,387	3,602,865,222	106,330,363,824
2018	1,342,058,572,088	1,258,174,473,218	5,709,093,279	78,175,005,591
2019	1,405,293,369,511	1,316,637,246,976	(964,878,805)	89,621,001,341

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

Table 2.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Wearing Apparel Industry - (Establishments with 25 or more persons engaged)

Year	Intermediate consumption (Rs.)	Raw materials consumed (Rs.)	Cost of industrial services done by others & other payments (Rs.)	Electricity & fuel consumed (Rs.)
2015	617,311,950,845	563,933,140,919	51,393,100,805	12,763,486,899
2016	632,251,284,156	538,194,476,437	72,917,372,739	21,139,434,980
2017	656,364,364,810	546,688,422,419	82,596,802,209	27,079,140,181
2018	813,474,483,061	691,639,244,033	95,806,224,401	26,029,014,626
2019	848,770,252,252	731,972,031,445	85,234,382,549	31,563,838,259

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

Table 2.11: Employment by Nature of Employments & Gender Classified by Wearing Apparel Industry Division - (Establishment with 25 or more persons engaged)

Year	Working Proprietors (No)		Unpaid family workers (No)		Operatives (No)		Other employees (No)		Total persons engaged	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
2015	421	111	58	272	97,034	297,588	51,206	45,362	148,719	343,333
2016	723	199	86	36	139,503	397,698	69,335	67,386	209,648	465,319
2017	774	241	60	20	113,683	461,641	71,840	72,013	186,358	533,915
2018	526	183	140	107	119,510	425,757	70,816	67,427	190,603	493,474
2019	395	91	52	67	121,183	426,120	69,629	67,900	191,259	494,178

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

Table 2.12.1: Economic Indicators of Industrial Activity Classified by Industry Class of Wearing Apparel Industry - (Establishments with less than 25 persons engaged)

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	1,805,334	2,815	8,659	1,163,961	1,815	5,583
2016	360,305	2.038	1.493	183,502	1.038	0.760
2017	397,472	2,575	1.610	243,133	1.575	0.985
2018	739,216	1,815	1.988	331,832	0.815	0.893
2019	572,945	2.228	0.785	315,821	1.228	0.433

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

Table 2.12.2: Economic Indicators of Industrial Activity Classified by Industry Class by Wearing Apparel Except per Apparel Industry - (Establishments with 25 or more persons engaged)

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	1,983,249	1.581	5.844	728,683	0.581	2.147
2016	1,533,916	1.654	2.88	606,246	0.654	1.138
2017	1,525,869	1.693	3.029	503,674	0.693	1.24
2018	1,933,032	1.656	2.889	765,985	0.656	1.145
2019	2,015,312	1.663	3.533	803,138	0.663	1.408

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

Table 2.12.3: Economic Indicators of Industrial Activity Classified by Industry Class by knitted or crocheted Industry (Establishments with 25 or more persons engaged)

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	2,629,621	2.092	2.352	1,372,577	1.092	1.228
2016	2,534,892	1.468	4.154	807,736	0.468	1.324
2017	2,706,941	1,447	4.463	606,563	0.447	1.380
2018	4,008,151	1.453	3.404	1,249,236	0.453	1.061
2019	4,003,469	1.483	3.358	1,303,637	0.483	1.093

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

Table 2.13: Categories of Employees by Nature of Employment Classified by Wearing Apparel Industry - (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	491,189	331,714	62,907
2016	673,922	451,441	85,760
2017	719,178	474,474	100,851
2018	683,121	444,497	100,770
2019	684,832	454,158	93,145

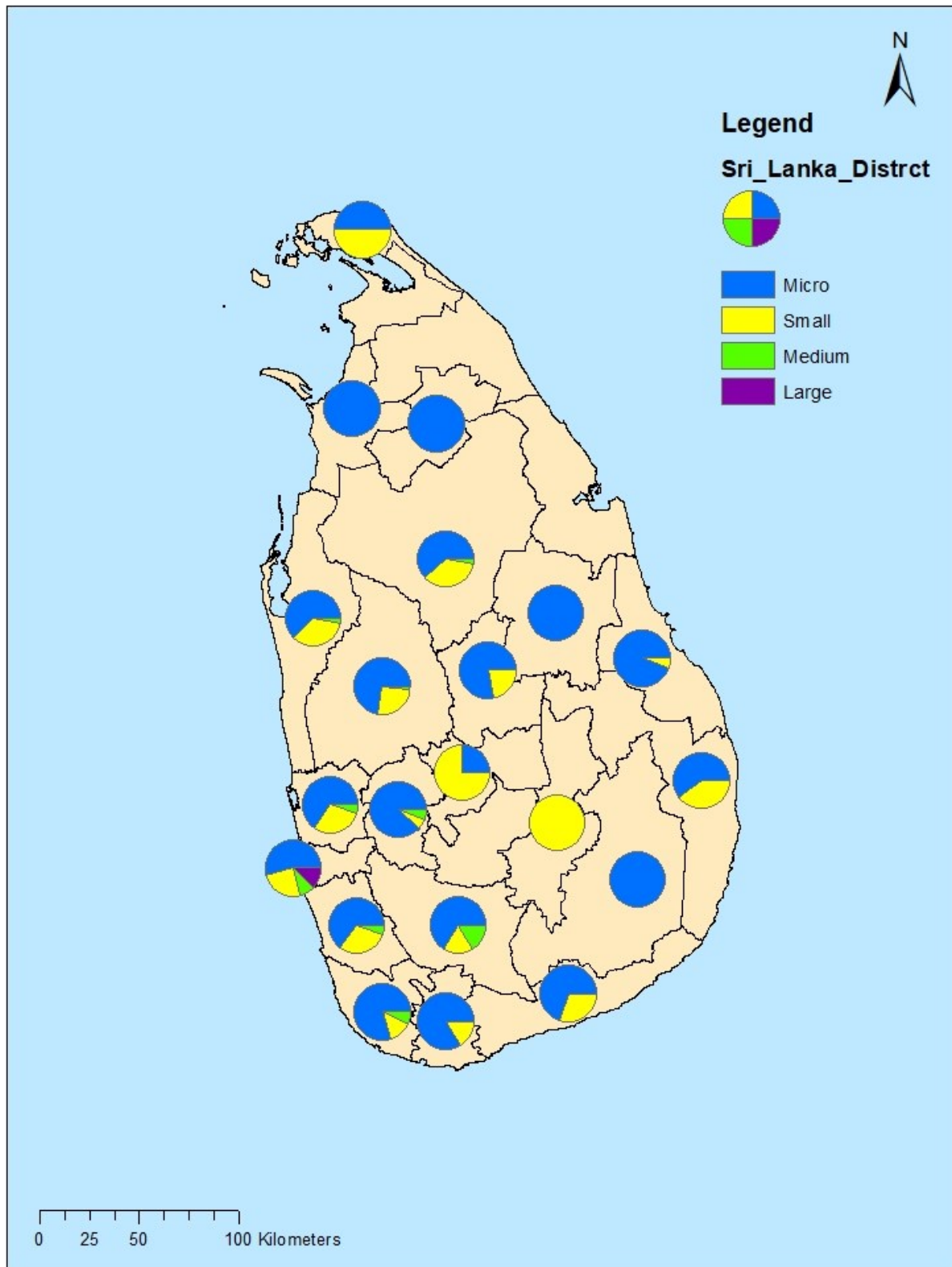
Source : Department of Census and Statistics, Annual Survey of Industries

Table 2.14: Number of Manufacturing Wearing Apparel 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
Manu. Of wearing apparel made out any fabric other than fur apparel	1,640	2,806	837	9,054	397	27,357	292	248,448
Total	1,640	2,806	837	9,054	397	27,357	292	248,448

Source : Department of Census and Statistics

Figure 2.4: Major Manufacturing Establishments of Wearing Apparel Sector by District in Sri Lanka

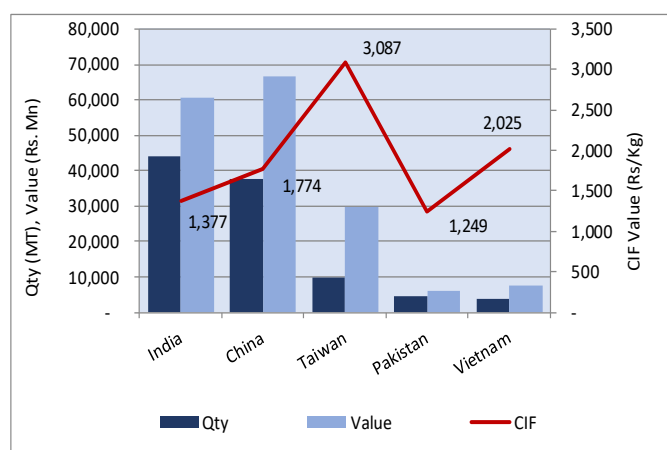


Source: Sri Lanka Customs

Table 2.15: Wearing Apparel Imports (2019-2021)

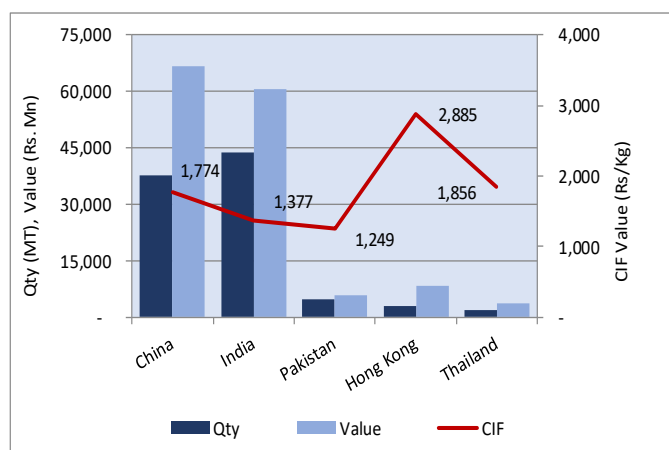
Description	Unit	2019		2020		2021	
		Quantity	Value	Quantity	Value	Quantity	Value
Knitted or crouched fabrics	MT	105,580	165,866	90,324	141,354	75,422	127,248
Articles of Apparel and clothing accessories, knitted or crocheted	('000) Number	8,402	5,230	8,094	4,841	11,100	7,692
Articles of Apparel and clothing accessories, knitted or crocheted	MT	3,348	6,863	3,376	5,631	2,969	6,055
Articles of Apparel and clothing accessories, not knitted or crocheted	('000) Number	17,178	15,748	11,050	9,416	8,651	7,970
Articles of Apparel and clothing accessories, not knitted or crocheted	MT	4,655	12,147	2,743	9,456	3,151	13,162
Other made up textile articles; sets; worn clothing and worn textile articles; rags	('000) Number	0.09	0.05	0.002	0.04	0.01	1
Other made up textile articles; sets; worn clothing and worn textile articles; rags	MT	7,471	5,723	4,744	7,990	6,262	7,509
Total	MT	121,055	190,600	101,188	164,432	87,803	153,974
Total	('000) Number	25,580	20,979	19,144	14,257	19,750	15,663
Grand Total			211,579		178,689		169,636

Source: Sri Lanka Customs



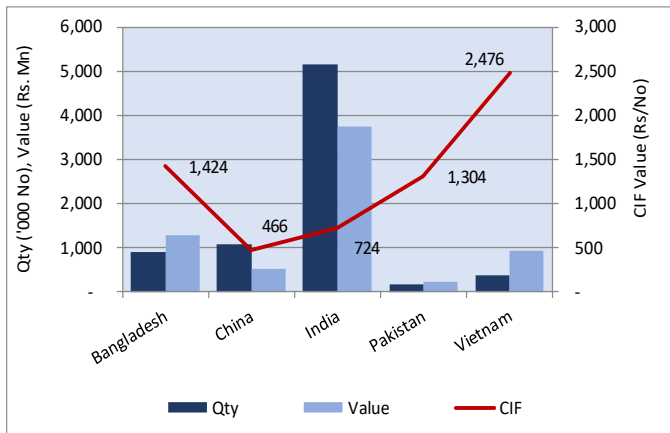
Source: Sri Lanka Customs

Figure 2.5: Major Import Countries of Knitted or crocheted fabrics - 2021



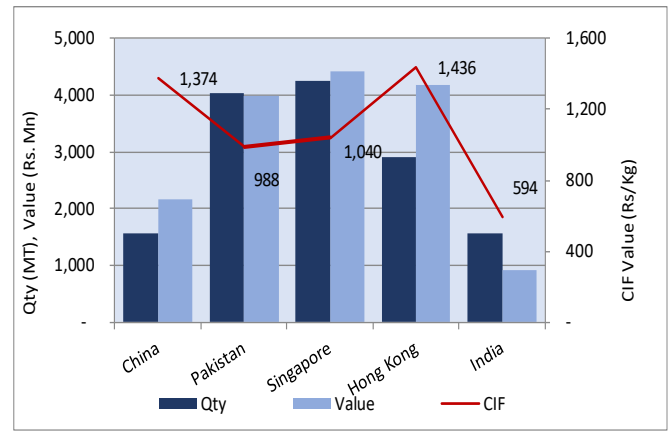
Source: Sri Lanka Customs

Figure 2.6: Major Import Countries of articles of apparel and clothing accessories, knitted or crocheted—



Source: Sri Lanka Customs

Figure 2.7: Major Import Countries of Articles of Apparel and Clothing accessories not knitted or Crocheted - 2021



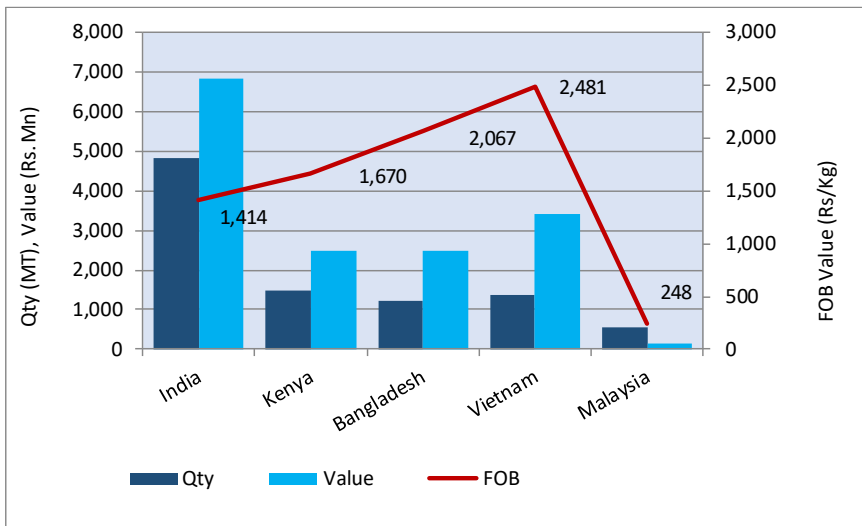
Source: Sri Lanka Customs

Figure 2.8: Major Import Countries of Other made up articles; sets; worn clothing and worn textile articles;

Table 2.16: Wearing Apparel Exports (2019-2021)

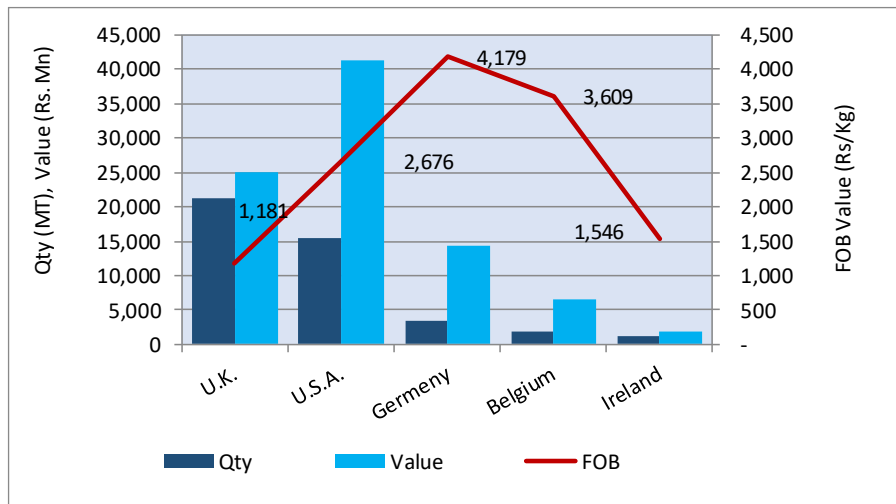
Description	Unit	2019		2020		2021	
		Quantity	Value	Quantity	Value	Quantity	Value
Knitted or crouched fabrics	MT	10,650	14,584	8,377	11,421,698	13,806	25,554
Articles of Apparel and clothing accessories, knitted or crocheted	('000) Number	856,440	439,550	637,655	342,538,482	851,335	475,435
Articles of Apparel and clothing accessories, knitted or crocheted	MT	17,381	107,887	15,444	71,440,673	54,665	135,859
Articles of Apparel and clothing accessories, not knitted or crocheted	('000) Number	291,226	262,126	123,345	175,507,078	155,920	220,836
Articles of Apparel and clothing accessories, not knitted or crocheted	MT	16,869	138,822	11,466	103,745,306	15,030	145,093
Other made up textile articles; sets; worn clothing and worn textile articles; rags	('000) Number	7	4	8	4,779	925	1
Other made up textile articles; sets; worn clothing and worn textile articles; rags	MT	18,593	18,052	20,647	40,335,776	23,599	23,832
Total	MT	63,492	279,344	55,932	226,943,453	107,100	330,338
Total	('000) Number	1,147,673	701,681	761,008	518,050,340	1,008,180	696,272
Grand Total			981,025		744,993,793		1,026,611

Source: Sri Lanka Customs



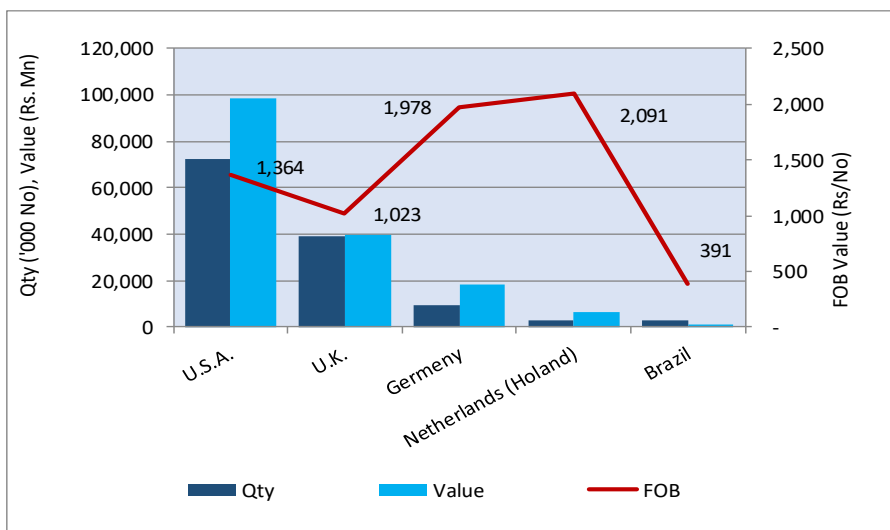
Source: Sri Lanka Customs

Figure 2.9: Major Export Countries of Knitted or crocheted fabrics - 2021



Source: Sri Lanka Customs

Figure 2.10: Major Export Countries of articles of apparel and clothing accessories, knitted or crocheted —2021



Source: Sri Lanka Customs

Figure 2.11: Major Import Countries of Articles of Apparel and Clothing accessories not knitted or Crocheted -

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