

Chapter 5 Analysis of Findings

This chapter analyses the findings of the research such as the level of technology, technological capability and the cross relationship between the technology and the present status of the industry.

5.1 Analysis of Individual Components of Technology

The results received from the assessment of technology are tabulated below.

Table 5-1 Assessment of Technology

Component of Technology	Level
Technoware	Between Secondary and Advance
Humanware	Between Elementary and Secondary
Orgaware	Secondary
Inforware	Secondary

According to the table 5-1, the technology component of Humanware has got the lowest ranking while the component of Technoware has received the highest ranking comparatively. The components of Orgaware and Inforware are rated as secondary, which is middle of other two components. According to the polytrophic components of manufacturing technology, the technology can be effectively utilized when all four components are satisfactorily available. Therefore the absence of some components causes the poor overall technology of the industry.

Considering the lowest ranked component of Humanware, the required well-trained workforce is not available to use the machinery and other equipments effectively and efficiently. This is a very critical situation since the machinery being currently used are not highly sophisticated or fully automated and consequently for a better output a well-trained manual intervention is essential. In fact, fully automated systems with precise information processing sub systems may not require high skills to operate as it functions with minimum or zero manual intervention. Generally, the machinery used

in the Leather industry are not very complex and are fundamental level type, where there are highly sophisticated or more advanced machinery with better functional capabilities are in the market. Therefore though the skills of the support Humanware or the maintenance staff has the skills to perform reactive maintenance, they are not skilled or trained on electronic equipment repairs. Thus the level of Humanware can be further lower when the existing machinery is upgraded or replaced as required. Therefore with the low level of Humanware the effective use of the Technoware can't be received. Thus the skill development of the contact Humanware is essential and immediately required. However the support Humanware does not need immediate skill development, but needed to be done with the upgrade of machinery.

Considering the level of Technoware, which falls in between secondary and Advance and more towards secondary level, the Technoware needs to be upgraded to meet the quality specified by the market. It is noticed that although there are many machines, which are used for the manufacturing operation, the quality and the functional capabilities of such machines are very low. Since the output of the Leather industry is treated as a luxurious product in most of the societies, the quality and the variety are highly appreciated. Such quality and the variety can't be achieved with the machines that are used in the industry at present. Though the Sri Lanka Leather is very competitive in price due to the low price of the local raw hides and the low labour cost, the industry could not meet the quality requirements. Furthermore, they are unable to process the demand for various new outputs. Therefore an immediate upgrade is required for the Technoware used in the industry.

The level of Orgaware, which falls in the level of secondary depicts that the level of the principles, practices or the structure that govern the effective use of Technoware by the Humanware in the industry is not adequate enough to be competitive. Because of the negative attitude of the most of the workers of the industry, absence of the Orgaware can result in higher cost of agency relationship to the stakeholders. Also the present Leather industry market has an immense competition on price, flexibility and quick response. Thus to cater such requirements appropriate Orgaware is required to utilize the Technoware and Humanware effectively to fulfill market requirement.

The level of Inforware in the Leather industry is Secondary and the Inforware is really needed to interpret, plan, implement, monitor, diagnose and rectify the value addition

activities for effective utilization of Technoware by the Humanware. In the Leather industry most of the Inforware related to the machinery and the process are available. This is very helpful in performing the operation in the proper manner and for simple maintenance activities. However the attempt to get the heuristic knowledge by the specialists cannot be considered as effective. Due to the absence of formal management training, the availability of the proper information systems for planning and control of the value addition activities could not be found in the sample organizations. It is essential that the Leather industry to improve the level of Inforware in order to get the full potential of the other technology component as the timely interactions between all the technology components is essential to fulfill the customer demands of flexibility and quick response.

5.2 Analysis of Individual Components of Technological Capabilities

The following table 5-2 summarizes the results of the assessment of the technological capability components.

Table 5-2 Assessment of Technological Capability

Technological Capability Component	Level
Acquisitive Capability	Advance
Operative Capability	Secondary
Adaptive Capability	Secondary
Innovative Capability	Elementary

The acquisitive capability of the industry has received the highest ranking of advance rating compared to the other capability levels. This is really satisfactory, especially in a situation where there is minimum government support for searching and acquiring of new technology. However, this has to be formalized by forming a formal local body for technology search and evaluation of the new technology. Also the buying power of the industry is adequate and they have a reliable relationship with the technology vendors that can be used in bargaining the components of the technology that can be transferred when procuring the technology.

The operative capability is rated as secondary and this capability is essentially required for getting the maximum output from the existing setup of the machinery and organization etc. The operative capability of the industry is not developing with time as there is no proper training or skill development program or at least well skilled workforce to train the others through on-job-training. Therefore this lack of operative capability needs immediate attention.

Also the adaptive capability of the Leather industry is also rated as secondary and this capability is very much important to adapt the technologies suitably to the industrial environment. It was understood that the capability of making minor modifications would be very useful to produce the variety of Leather that is demanded by the market. As the Leather industry is running on recipes for different products, the process improvements causes only indirect benefits such as reduce the wastage or maximum use of raw materials and other inputs to the process etc.

The innovative capability of the Leather industry is rated as elementary and a development of this capability in the near future cannot be expected. With the present competition in the market, the Leather industry first needs to develop the capabilities to sustain in the market.



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5.3 Cross Relationship in the Present Levels of Technology, Technological Capability and the Industry Status

The acquisitive capability of the Leather industry is rated at a comparatively higher level, which is Advance. Also the Technoware of the industry is also between the secondary and advance levels. Therefore the high acquisitive capability of the industry results in higher level of the Technoware. On the other hand, the level of the Humanware in the industry is very low. The operative and adaptive capabilities are also at the secondary level. Therefore there is a possible relationship between the low level of Humanware with the low level of operative capability. Without having a well skilled workforce in the industry, the operative capability and then the adaptive capability cannot be accumulated in the organization.

Chapter 6 Conclusion and Policy Recommendations

The technological capabilities cannot be purchased, transferred or improved in a day. It needs to be accumulated in the industry and the availability of the satisfactory level of technology components can support this development. Therefore the probable interrelationship between the technology and the technological capability provides the base for development of each other.

6.1 Findings of the Study

The results of the assessment and the input data collected in the interviews are analyzed and the following findings are formed.

Technology

The appropriate Technoware is required to be selected depending on the quality of the functional capabilities of the machinery and the quality of the labour available. Considering the low level of Humanware, it is much better if the machinery, which can perform the required operation to the required quality, is selected. Also if more sophisticated machines can be sourced for critical operations, the damages made by the errors of unskilled labour can be reduced and high quality and variation can be expected. As it was found that the machinery used in the industry had not been upgraded for about ten years, there is a probable chance that new purchases can be of outdated technology. Therefore when selecting the Technoware, it is really needed to assess the Technoware by an industry expert, who has an up to date knowledge of the technology.

The Effective use of Technoware is not possible to be received unless proper Humanware is not in place. In the Leather industry the contact Humanware is more crucial than the support Humanware as the current Technoware is not very complex to be maintained. The skills of the contact Humanware can be developed either by sending the supervisors for short courses in overseas Leather technology institutes. The CLRI, India is the closest training institute on Leather technology. The trained supervisors can train the workforce and provide on the job training to the new hires when required. This can also be done by hiring skilled people from overseas for sometime and allow the workforce to get in house training. Also as a long-term plan,

a course module on Leather technology can be included in the syllabus of technical institutions such that the followers can receive a certification. This not only provides the foundation skills for the Humanware, but also gives some recognition to the industry workers.

The improvement of the Orgaware needs management focus and commitment. As the first step the management needs to be given with proper management training and managerial skill development and then the appropriate management systems are needed to be introduced to the industry. This may need a restructure in the industry.

There should be a central body governing the tanneries and the basic and common Inforware especially Technoware specific Inforware and Humanware specific Inforware can be stored with them and the stakeholders of the industry can access them. However it is needed to evaluate the available planning systems and Customer Relationship Packages etc. for the suitability for the industry.

Technological Capability

Technological capabilities can't be purchased as in the case of development of technology. It is an asset, which must be accumulated by the industry over the time. However the developments of the technological capabilities are very much important for the sustainable development of the industry. When there is ability to acquire, adapt and operate the technology, the development of the technology happens naturally.

The capability of searching new technologies can be improved by the collaborative effort of the industry players or with the support from a technological institute. Also the operative capability will be increased with the developments of the Humanware in the industry. However to improve the adaptive capability, a testing laboratory or R&D units are required. The minor product or process modifications can be tested in the laboratories before applying to a batch of raw materials. Upon the success of the testing it can be applied to the total batch. Therefore the capability development need a supportive environment with a good level of technology.

Raw Materials & Other Value Chain Activities

The raw material for this industry is the raw hides and skins. So it is very crucial that the required quality and the quantity of the raw hides are available for the processing.

Proper husbandry methods should be used to create good skins or hides. Also the identified good quality animals should be fenced to avoid natural defects to the skins. Also the existing legislations on branding should be enforced and a control body has to be selected to continuously check for the compliance.

Also proper technique should be introduced for slaughtering of animals and then the extraction of the hides in the abattoirs. The proper flaying techniques need to be introduced to avoid the unnecessary damage to the skins.

Also the prices for the raw hides or skins should be decided depending on the quality and the how free from defects etc. instead of using the base of the quantity measure.

Environmental Aspects & Bata-atha Leather Industrial park

The CEA standards specially defined for the tannery effluents was established in 1989 and then the CEA declared that the license for the chrome tanneries will not be extended after 2001 unless they shift to Bata-atha or have their own effluent treatment plants meeting the CEA standards. Due to the delay in project completion of the Bata-atha industrial park, this period had been extended and the industry based in Colombo and Gampaha is on this extension.

To eliminate the public protest, it is needed to improve the public awareness on the benefits received through the industrial complex. A mass media campaign can be organized and also subject experts can be used to deliver the truth. Also it can be discussed with the village committees or the informal and formal village leaders on the benefits of the complex and the level of the proven technology, which will not damage the fishing resources around the village.

Also for the organizations that plans to shift to Bata-atha need to invest a lot for the new building constructions, new machinery purchases, and pay for the compensation for the workers who are not willing to shift etc. Therefore to motivate the

organizations to shift it is required to make a special financial support scheme from the banking sector.

Price Competitiveness to Differentiation

The output products from the local Leather industry are very price competitive in the international market and the reasons for the low price are the low cost of labor and the low price of the local raw hides and skins. In the open economy and free trade, the export barriers for the raw hides may not survive long and then the price of the local raw hides will rise up. Also when the tanneries are shifted to Bata-atha there will be an additional transport cost that will influence to the final price of the Leather. Therefore the price competitiveness should not be the long-term market strategy.

For the differentiation of the product, both the quality and the variety of the Leather are important. In fact, the local hides have the natural fineness of the grain and the aesthetic quality. Thus the use of proper Technoware will cause the high quality output and also the presence of the testing laboratory will allow testing a variety of Leather.

However it is needed to understand the market behaviour and the dynamics of the buyers in forming a marketing strategy.

6.2 Summary of Findings

The findings described above are summarized as points below for further consideration.

Summary:

- Industry needs to go for more sophisticated Technoware with special functional capabilities when replacing the existing outdated Technoware.
- Assessment of the new technologies should be performed by a competent industry expert and this service can be received by hiring international consultants
- Supervisors are needed to be trained immediately and the CLRI, India can be used as the training institute
- Management should be trained for contemporary management practices

- Leather Technology should be introduced as a course in Technical Institutes and a certification path should be introduced for career developments.
- A testing laboratory should be established to allow the industry players to test and improve the products and the processes.
- Farmers should be advised and promoted to fence the domestic animal yards.
- Proper husbandry methods should be introduced to improve the quality of the skin or hide.
- Proper Slaughtering and flaying methods and techniques must be introduced.
- Branding Legislation should be enforced and a control and monitoring body should be identified.
- The Livestock authorities and the tanning sector should be integrated to collaboratively develop the quality and quantity of the raw materials.
- Improve the awareness of the Bata-atha project to the village people through a mass media campaign, using a subject expert or through the village formal and informal committees.
- Special financial support scheme for this industry for the shifting purpose.
- Industry should get the support of international marketing agencies to understand the market behaviour and the potential opportunities for the Leather industry in Sri Lanka



6.3 Proposed Structure for the Industry

In order to eliminate the lack of coordination between the required public authorities and the Leather industry the following structure shown in the figure 6-1 is proposed. The most prominent factor for this separation is the full privatization of the Leather industry. Thus there is no government body that has responsibilities over the development of this industry. The suggested public organization will fill that gap and the Ministry of Industrial Development, Sri Lanka Association of Tanneries Pvt. Limited and the Leather industry will be directly linked. This public organization can be a section under the Ministry of Industrial Development. Also this public organization can perform as the control body of the industry and the coordination can be done through the single entry of existing SLAT.

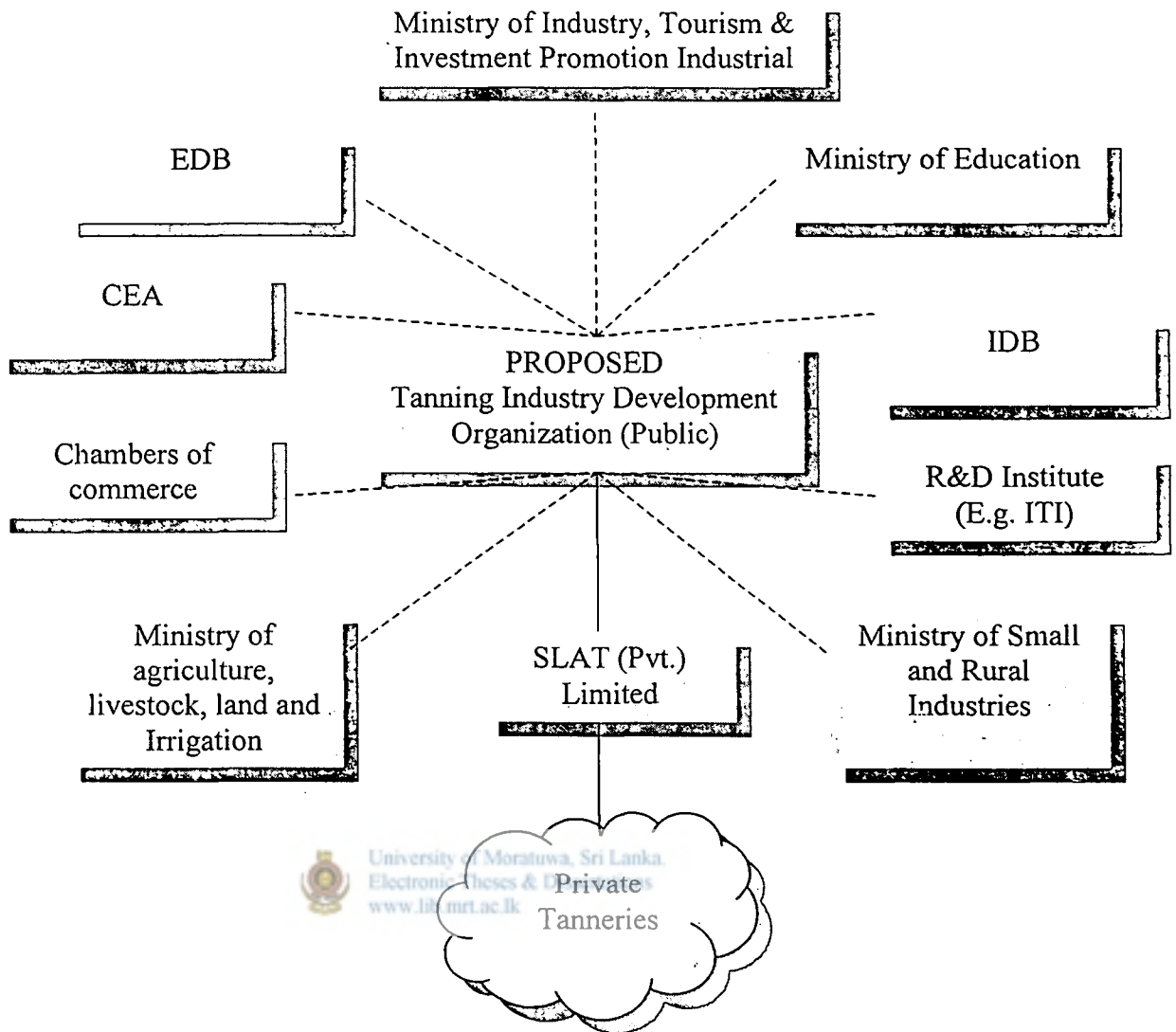
Also the suggested coordination between the Livestock Authority is for the improvement of the hides and skins. The coordination between the IDB and Ministry of Higher Studies is to continuous program of vocational training on Leather manufacturing and introduction of Leather technology to the technical institutes with certification. Also the R&D institute mentioned in the figure can be either a technology incubator or other technical institute who can support the Leather industry for Technology search and assessment and especially to provide the facilities to test the new Leather products. Thus this R&D institute should possess a well-equipped laboratory for the Leather testing. This body either needs to be started or an existing technical institute can be used with the required special laboratory facilities. Also the linkage with the Export Development Board, EDB is for market development and product improvements.

The suggested mechanism for coordination eliminates or opens the path for the elimination of the major identified weaknesses in the industry.



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Figure 6-1 Proposed Structure for the Leather Industry



6.3 Policy Recommendations

The summary of the findings that had been identified are categorized to form the policy recommendations.

- Establishment of a Technology (Technoware) Development Program:
 - Industry should go for more sophisticated Technoware with special functional characteristics when replacing the existing outdated Technoware.
 - Assessment of the new technologies should be performed by a competent industry expert and this service can be received by hiring international consultants

- Systematic training programme for the industry employees:
 - Supervisors are needed to be trained immediately and the CLRI, India can be used as the training institute
 - Management should be trained for contemporary management practices
- Academic recognition through the certification for the tanning Technology
 - Leather Technology should be introduced as a course in Technical Institutes and a certification path should be introduced for career developments.
- Establishment of a testing laboratory and a R&D institute:
 - should be established to allow the industry players to test and improve the products and the processes.
- Improvement of the quality and quantity of raw hides and skins:
 - Farmers should be advised and promoted to fence the domestic animal yards.
 - Improvement of raw hides Proper husbandry methods should be introduced to improve the quality of the skin or hide.
 - Proper Slaughtering and flaying methods and techniques must be introduced.
 - Branding Legislation should be enforced and a control and monitoring body should be identified.
 - The Livestock authorities and the tanning sector should be integrated to collaboratively develop the industry.
- programme to develop the environmental aspects meeting the CEA standards
 - Improve the awareness of the Bata-atha project to the village people through a mass media campaign, using a subject expert or through the village formal and informal committees.
 - Special financial support scheme for shifting the tanneries
- Export marketing development Programme:
 - Industry should get the support of international marketing agencies to understand the market behaviour and the potential opportunities

- Establishment of a coordination mechanism between the authorities.

6.4 Prioritization of the Policy Recommendations

By using the Analytic Hierarchical Process explained in the chapter 3, the above-mentioned recommendations were prioritized and then presented in a hierarchical manner below. The summary of workings is shown in the appendix C. The criteria for the prioritization had been selected as the capital, feasibility, strategic effect, time, and the sustainable development. From them the capital, feasibility and the strategic effect had been considered more preferred than the rest of the criteria. The prioritized policy recommendations are mentioned in the figure 6-2 in the hierarchical manner.

Figure 6-2 Prioritized Policy Recommendations

1. Programme to develop the environmental aspects meeting the CEA standards
2. Systematic training programme for the industry employees
3. Export marketing development programme
4. Technology (Technoware) Development Program
5. Establishment of a testing laboratory and a R&D institute
6. Academic recognition through a certification programme for the tanning Technology
7. Coordination Mechanism between the authorities
8. Improvement of quality and quantity of the raw hides and skins

6.6 Conclusion

The Leather industry in Sri Lanka has the potential to develop as the demand for the high quality leather is rising in the world market. Furthermore, it is locally recognized as an industry, which needs improvement to provide employment through leather goods manufacturing sector. In fact, the restrictions on the Environmental pollution has made the industry standstill for several years and the development of the leather industry in Sri Lanka is slow compared to the developments in other regional countries.

It was observed that the levels of the overall technology and technological capability are not satisfactory and thus needs improvements. Also it was observed that being totally privatized, the coordination with the other necessary public organizations is very poor. All the findings in this study are summarized to form policy recommendations and then compared to prioritize them in a hierarchical manner.

It was identified that the most immediate requirement is to complete and commission the Bata-atha leather complex project to shift the industry from the present risky situation of closing down. Then the systematic training and skill development programme is essentially needed to improve the operation and consequently allow accumulation of the operative capability in the industry. Then the export marketing development is needed to expand the scope and new markets. Though a large investment is required, the machinery, which is presently used in the industry, needs replacement with better functional machinery for achieving high quality and quantity in the output. Then to realize the results of the machinery replacements, it is appropriate to setup a common testing laboratory. That laboratory can be transformed to be an accredited institute for certification for the products or can be utilized to test new products samples. In addition, in order to improve the attitude of employees towards the job, the recognition of the workers in the leather industry can be increased by introduction of a certification programme. The certification programme will result in improving the attitude of the workers as working in the leather industry may also be recognized as an important employment. Implementation of a coordination mechanism between the primary stakeholders and the tanneries is also needed as suggested. However the SLAT (Pvt.) limited still can perform as the gateway to the tanneries with more responsibilities and the communication with the other public and private organizations can be routed through the suggested public organization. However though the enforcement of the branding act and the introduction of better husbandry, protection and the better flaying techniques need collaborative effort from several parties such as the live stock authorities, government and general public etc., it is essentially need to implement the quality improvement in raw hides.

Therefore the consideration of the suggested policy recommendations in the suggested order can equip the leather industry in Sri Lanka to face the market completion and achieve its potentials.

6.7 Agenda for Further Research

The proposed industrial park at Bata-atha has not achieved its target dates for the completion and not commissioned even when this dissertation is submitted. Therefore it is worthwhile to study and evaluate the technology that had been transferred.

Further the Leather goods manufacturing sector has also not been studied in this research. Both these industries go together and one depends on the other. It is not cost effective to use imported Leather for the Leather goods manufacturing and one market segment for the tanning sector output is the local Leather goods industry. Therefore the Leather goods industry sector also needs an extensive study and development plan. In addition, the evaluation of the leather manufacturing process technology used in the leather industry in Sri Lanka compared to the process followed in other countries, may also be considered as another possible research opportunity.



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Appendix A Questionnaire Used For Interviews

Pls. answer for the questions that are relevant and possible according to your role in the industry/organization.

SECTION 1- General Information

The objective of this section is to identify the general information about the interviewee/ organization represented by the interviewee.

What is the Role and responsibilities of the Interviewee in the Leather Industry?
If you represent a Leather manufacturing organization pls. fill the following.

- a) Name of the Organization:
- b) Address:
- c) Telephone: Fax/Email/URL:
- d) Final products of the organization
- e) Annual Turn Over
- f) Capacity of the plant
- g) No. of employees:  University of Moratuwa, Sri Lanka
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SECTION 11 – Value Addition Activities

The objective of this section is to identify the value addition stages of the industry.

Skinning → Wet Salting → Soaking → Flesh Removal → Liming/
Limed Splitting → Deliming → Tanning → Sammying →
Splitting → Retanning → Sammying → Setting Out → Drying
→ Sorting → Finishing (Buffing, Undusting, Ironing & Embossing, Coating,
Spraying, Measuring, Grading)

Pls. mention the additional stages that are followed and the changes of the order of the activities.

SECTION 111 – Technology

The objective of this section is to examine the level of technology and the likely developments in the Leather industry.

- a) What machinery is used for each value addition stage and the level of sophistication?
- b) Is the existing machinery capable of producing the desired outputs?
- c) Does the existing machinery need replacements and if yes why and what level of new machinery should they be replaced with.
- d) Are there any automated machines that can operate precisely or any automated sensing, analyzing and controlling systems integrated to the machinery?
(Degree of sophistication)
- e) Do you use machinery for the other activities such as packing and transporting the semi finished products to different processes. If yes, what machinery is being used?
- f) Are the operators equipped with the required skills to operate the machinery confidently? Do they have the required skills to get the desired output?
- g) Is the maintenance crew capable of maintaining the machinery and other equipments effectively?
- h) Are there quality assurance and planning staff and the level of capability?
- i) What is the capability of the production management?
- j) What kinds of skill development or training system do you have and what developments are needed?
- k) Do you and the organization believes that the technology can perform or develop the current status of the organization
- l) Do you practice any specific organizational practices?
- m) What kind of organizations hierarchical system do you have, pls. explain?
- n) Do you have a formal employee appraisal system and training and skill development system? Pls. brief.
- o) Do you have the operating/maintenance manuals and other relevant technical information on the existing machinery?
- p) How do you get the technical know how on the best practices and methods of fine tuning for the machinery and how are they shared?

- q) Do you have the information on the production and other operational data information?

SECTION IV - Technological Capability

This section of the questionnaire addresses the technological capability of the Leather industry and the technological capability had been classified under four categories such as acquisitive, operative, adaptive and innovative capabilities.

A) Assessment of Acquisitive Capability

- a) Is there a formal body for technology search for the Leather industry?
- If yes, is it a government for the total industry or private for individual organizations?
 - If no, who is advising on the new technologies?
- b) What are the ways practiced for searching for new technologies?
- c) When is the assessment criterion for new technologies? (Project evaluation method, stage of technology etc.)
- d) Are there any identified technology vendors for the industry and what is the level of relationship with them? What is the level of negotiation and buying power in a technology procurement situation?
- e) What sort of procurement mechanism is generally used for a new technology purchase?
- f) Does the industry have capable workforce to install and bring the new machinery to ready for operation or does it need to get the outside support for the installation?

B) Assessment of Operative Capability

- a) Is the workforce capable to operate the existing machinery effectively?
- b) Can the quality standard demanded by the market be achieved with the current skills of the workforce?
- c) Can the demand be achieved with the desired characteristics with the current operating level? If not why?
- d) How capable are they in quality control activities in the process?

- e) Are the maintenance staff able to proactively and reactively maintain the tanneries with minimum breakdown time
- f) Is the skilled workers' knowledge updated and what method is used to train the workforce.

C) Assessment of Adaptive Capability

- a) Are the existing technology used in tanneries is the exact version of the original technology or were they adopted with modifications to suit the country requirement?
- b) Were there any recorded new machines or process improvements in the methodology implemented in the industry and if yes, what kind of improvements?
- c) Are there any formal government body trying to introduce new methods or machinery or slight improvements?
- d) Is the workforce allowed/motivated to make and test for improvements in the tanneries?

D) Assessment of Innovative Capability

- a) Is there a formal R&D organization focusing on Leather industry to your knowledge?
- b) Were there any radical product and process modifications recorded in the Sri Lankan industry?
- c) Are there any subject specialists attempting to innovate any new process or machinery relevant to Leather industry?



SECTION V

- a) What are the final products and the market for them?
- b) What are the position of Sri Lanka in the export market and the behaviour of the market?
- c) The market strategy being followed and the problem and plans for the future
- d) Who are the major competitors in the export market and what strategies are planned to face the competition?
- e) Which countries have well developed tanning industry and are they using advanced technologies.
- f) Why modern technologies are not used and the level of access to the technology

- g) The awareness on the CEA restrictions and the plans to meet them by the industry
- h) Awareness and the compliance to the factory ordinance and the steps taken to ensure the employee health safety
- i) Bata-atha project:
 - o Do you think the location of the project suits for the operation of the industry
 - o How confident are you to operate independently in Bata-atha when commissioned and the operation of the CETP?
 - o What do you think about the public protest on the proposed sea outfall?
 - o The reasons for not commencing shifting work , problems faced and the shifting plans for the future

- j) What are the problems/issues faced by the industry : internal and external
- k) Who are the stake holders of this industry and the level of integration,
- l) What are the level of govt. focus and the govt. contribution for the development of tanning industry and what is expected from the government?
- m) What are the possible developments in the industry? What do you propose/think that essentially need to develop the Leather industry in Sri Lanka?

Appendix B Profiles of the Interviewees

1. Mr. C. Batuwangala, Chairman, Sri Lanka Association of Tanners Pvt. Ltd.
Former General Manager of Ceylon Leather Products Corporation, former Managing Director of Ceylon Leather Products Limited and the Project Coordinator-UNIDO for the Bata-atha Leather Complex Project.
2. Mr. R.V.D. Piyathilake, Director, Investment Promotion Division, Ministry of Enterprise Development, Industrial Policy & Investments Promotions and the National Project Coordinator for the Bata-atha Leather Complex Project.
3. Mr. L.P.S Karunadasa, Officer in Charge, Center for the Development of Leather Products and Footwear, Industrial Development Board of Ceylon.
4. S.A. Perera & Company, (SAP): Tannery capable of finishing 3.6 mn sq.ft. of crust Leather per annum. Approximately it is capable of processing 6,000kg per day and has about 38 skilled workers.
5. Ceylon Leather Products Limited, (CLPL): This was the earlier State owned Ceylon Leather Products Corporation and later in 1991 privatized and renamed as Ceylon Leather Products Limited. The tannery can operate with 3.6mn sq ft-capacity from raw to finish and has about 120 total workers with 55 casual and others of skilled workers. This has the capacity of 12,000 kg per day
6. TanLanka Limited: Established in 1987 with the capacity of 2.4mnsq ft from raw hides to crust Leather and has about 32 skilled workers.
7. Abdul Cader & Company: This has the capacity of 5,000 kg per day and it has employed about 40 including both skilled and casual workers.