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A VERY BRIEF "LOOK AT" THE
DOMESTIC/EXPORT MARKET POTENTIAL
FOR RAMIE AMONG
SELECTED SRI LANKAN TEXTILE INDUSTRY
SECTORS

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COPY: FREELANKA MANAGEMENT CO (PVT) LTD

MR. H.D.S. GAJAWEERA

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INTRODUCTION

THE AIM OF THIS RESEARCH IS TO ESTABLISH WHETHER A MARKET FOR A DOMESTIC GROWN RAMIE EXISTS IN SRI LANKA, FOR EITHER EXPORT OR DOMESTIC CONSUMPTION WITHIN THE TEXTILE INDUSTRY. RAMIE IS GENERALLY PERCEIVED AS A COST COMPETITIVE ALTERNATIVE TO LINEN, WHICH HAS EXPERIENCED RECENT GROWN IN APPEAL. RAMIE IS MOST COMMONLY BLENDED WITH COTTON, AND TO A LESSER DEGREE WITH POLYESTER.

THE APPAREL INDUSTRY IN SRI LANKA HAS EXPERIENCED ENORMOUS GROWTH OVER THE LAST 12 YEARS. IN 1980 APPAREL EXPORTS WERE VALUED AT US\$ 100M. IN 1992 EXPORT VALUE HAD EXCEEDED US\$ 1 BN. IN 1990 APPAREL ACCOUNTED FOR ONE THIRD OF ALL EXPORTS FROM SRI LANKA IN VALUE TERMS. ACCORDING TO 1992 FIGURES THE UNITED STATES ACCOUNTED FOR 56% OF THE APPAREL EXPORT MARKET, WITH EC COUNTRIES (GERMANY, UK, FRANCE, NETHERLANDS) ACCOUNTING FOR 27% OF THE APPAREL EXPORT MARKET. THE EXPORT MARKET IS CONTROLLED BY QUOTA; BY GARMENT TYPE FOR THE EC, AND BY GARMENT TYPE AND ITS COMPOSITION FOR THE UNITED STATES. CERTAIN OPPORTUNITIES EXIST HOWEVER AS THERE ARE QUOTA FREE ITEMS, TO THE EC; DRESSES, T'SHIRTS AND SWEATSHIRTS AMONGST OTHERS; TO THE U.S, RAMIE, LINEN AND WOOL RICH SHIRTS AND BLOUSES.

SRI LANKA IS ELIGIBLE TO QUALIFY FOR THE GENERAL SYSTEM OF PREFERENCES (GSP), TO THE EC, IF THE FOLLOWING PROCESSES TAKE PLACE IN SRI LANKA: GROWING OF RAW MATERIAL, SPINNING OF YARN (FROM THAT RAW MATERIAL), WEAVING OF FABRIC, DYING AND FINISHING OF THE FABRIC AND GARMENT MAKE UP. THE GSP QUALIFICATION ELEVATES THE BUYER OF THE COST OF DUTY (13-14% OF COST PRICE).

THE 200 FACTORY PLAN INITIATED BY THE LATE PRESIDENT R PREMADASA HAS WITNESSED THE OPENING OF MANY NEW FACTORIES IN A VERY SHORT TIME. IN THE VIEW OF SOME PEOPLE IN THE INDUSTRY MANY FACTORIES ARE FACING DIFFICULTY DUE TO POOR MARKETING AND MANAGEMENT SKILLS. IT IS PREDICTED THAT MANY FACTORIES WILL CLOSE, THUS BENEFITING THE MORE EFFICIENT FACTORIES WHO WILL BE ABLE TO CAPITALIZE ON THE QUOTA AND ORDERS MADE AVAILABLE BY THE CLOSURES.

CURRENTLY MOST PIECE GOODS ARE IMPORTED FROM HONG KONG AND TAIWAN. THERE IS A DEMAND FOR A PRICE AND QUALITY COMPETITIVE MILL TO SUPPLY FABRIC TO THE GROWING APPAREL EXPORT MARKET IN SRI LANKA.

ALL THE INFORMATION TO FOLLOW HAS BEEN GATHERED THROUGH INTERVIEWS/DISCUSSION WITH THOSE IN THE RELEVANT FIELD OF THE INDUSTRY.

CONTRACT REPORTS APPAREL 93 TRADE SHOW

1. HYBRO GROUP OF COMPANIES

MR IQBAL HYDER ALI - DIRECTOR. TEL: 714618/713651

THIS COMPANY CLAIM TO HAVE BEEN INVOLVED IN RAMIE PRODUCTION 5 YEARS AGO, THEY BELIEVE THAT THE PROJECT FAILED DUE TO LACK OF TECHNOLOGY. THEY WILL BE GOING INTO SPINNING AND WOULD BE INTERESTED IN GETTING INVOLVED. THEY HAVE PURCHASED RAMIE BASED CLOTH FROM HONG KONG. MUCH OF THE INFORMATION PROVIDED WAS VERY VAGUE. THEY ARE NOT INVOLVED IN EXPORT.

2. ORION TEXTILES (PVT) LTD.

MICHAEL HUSSAIN TEL: 635560/634463

ORION TEXTILES ARE A GARMENT MAKER, PREDOMINANTLY WOMANS WEAR. THEY HAVE USED 55% RAMIE 45% COTTON MIX BEFORE TO PRODUCE DRESSES FOR THE FRENCH MARKET. SINCE 1992 THEY HAVE USED 30,700 YARDS OF RAMIE/COTTON IN 51X58 CONSTRUCTION ON 21'^s X 19'^s YARNS. FABRIC WIDTH 43-44" . PRICE US\$ 1.25-28 CIF COLOMBO, SOURCE HONG KONG.

3. TOOTAL THREAD

MR AMARASEKERA TEL: 449575/423194

TOOTAL IMPORTS FINISHED FABRIC FOR GARMENT FACTORIES. THEY HAVE IMPORTED SMALL AMOUNTS OF RAMIE COTTON BEFORE FROM HONG KONG. BUT WERE UNABLE TO ELABORATE.

4. HAYLEYS MGT KNITTING MILLS LTD

SAM SPEZZA TEL: 699087-100

HAYLEYS KNIT AND MAKE UP GARMENTS. CURRENTLY THEY ARE NOT USING RAMIE, BUT IF DEMANDED WOULD BE CAPABLE OF KNITTING IT.

5. KURUWITA, MANCHESTER TEXTILE MILLS

MR ASLAM MOHAMED/INTHIKAB MUKAJIREEN

TEL: 571137/571149/339302

INVOLVED IN PROCESSING GREIGE CLOTH, (RAW STATE FABRIC SOMETIMES TERMED GREY FABRIC) DYING AND FINISHING WITH A 2 MILLION MTR MONTHLY CAPACITY. ALSO INVOLVED IN THREAD PRODUCTION, BUT NOT SPINNING YARN YET. THEY ADVISED THAT RAMIE IS SPUN THE SAME WAY AS COTTON AND WOULD NEED TO BE PROVIDED IN BAILED FORM (THIS CONFLICTS WITH INFORMATION TO FOLLOW). THEY BELIEVE THERE IS A DEMAND FOR RAMIE, THOUGH WERE UNABLE TO SUBSTANTIATE THE POINT.

6. STAR GARMENTS

ROBIN JOSEPH

TEL: 452935/452936

PRODUCING HIGH QUALITY PRODUCT MAINLY FOR THE US, LADIES MARKET. CURRENTLY NOT USING ANY RAMIE PRODUCT, BUT WITH THE VIEW THAT RAMIE'S PROFILE IS ON THE INCREASE IN THE US THIS MAY CHANGE.

7. BROADSWORD APPARELS (PVT) LTD.

GAMINI JAYAWARDENA

TEL: 576778/576840

PRODUCING QUALITY LADIES PRODUCT FOR UK MARKET; LAURA ASHLEY & WINDSMOOR (WHO ARE CONNECTED WITH WILLIAM BAIRD IN THE UK). THE FACTORY IS BUYING CLOTH FROM HONG KONG, KOREA, JAPAN & TAIWAN. LAURA ASHLEY & WINDSMOOR ARE IN THE LINEN & LINEN MIX MARKET, AND THERE I SEE POTENTIAL AS WITH STAR GARMENTS TO BE CONSUMERS OF RAMIE/COTTON.

8. TRI STAR

MR ROMESH

TEL: 503256/503934

TRI STAR CONTROLS A LARGE NUMBER OF FACTORIES. IN COLLABORATION WITH SR GENT THEY SUPPLY MARKS & SPENCERS IN THE UK. THEY HAVE USED RAMIE COTTON BEFORE. FOLLOWING THE SHOW I CALLED MR ROMESH

WHO ADVISED THAT THE GROUP HAD PRODUCED 10,000 DOZ PAIRS OF MENS & LADIES TROUSERS IN A RAMIE MIX FOR THE UK MARKET IN THE PAST 9 MONTHS. I WOULD ESTIMATE THE FABRIC CONSUMPTION TO BE OVER 180,000 YDS. MR ROMESH STATED HE WOULD BE VERY INTERESTED TO KNOW OF A SUPPLIER PRODUCING RAMIE/COTTON DOMESTICALLY.

9. PUGODA TEXTILES

MR NATARAJAN

TEL: 574499/574533

PUGODA ARE SPINNERS AND WEAVERS, PRODUCING 25 MILLION MTR PER ANNUM, 90% OF WHICH IS UTILIZED BY THE DOMESTIC MARKET. THEIR MACHINERY IS OLD AND THEREFORE NOT CAPABLE OF PRODUCING THE 45" WIDTH OR QUALITY DEMANDED FOR EXPORT. THE FACTORY IS UNDERGOING A MODERNISATION PROGRAMME WHICH WILL GIVE THEM THE CAPABILITY OF PRODUCING 64" WIDTHS. ON THE DISCUSSION OF SPINNING IT WAS ADVISED THAT MODIFICATIONS WOULD BE REQUIRED TO SPIN RAMIE ON PUGODA'S COTTON SPINNING MACHINE. RAMIE WOULD NEED TO BE CUT TO 40MM LENGTHS TO BE SPUN. THIS IS TERMED THE COTTONIZED STATE. A DIFFERENT MACHINE IS REQUIRED TO DO THIS. MR NATARAJAN STATED THAT ALL MILLS IN SRI LANKA SPIN SHORT STAPLE YARN (40MM STAPLE LENGTH) AND USE THE RING SPINNING METHOD. RAMIE IT WAS ADVISED IS DYED AND PRINTED USING THE SAME MATERIALS AS COTTON. THE RESTRICTING FACTORS IN PUGODA'S VIEW TO THEIR INVOLVEMENT ARE I) OLD MACHINERY. II) HIGH COST OF ELECTRICITY III) COST & TAX ON IMPORTED PARTS/MACHINERY IV) LACK OF RAW MATERIALS. THE GSP BENEFIT OF DOMESTICALLY PRODUCED FABRIC WAS DISCUSSED AS AN OPPORTUNITY.

10. HIRDARAMANI GROUP

MAHESH HIRDARAMANI

TEL: 078 44713

THE HI GROUP ARE A LARGE GARMENT MAKER AND EXPORTER, WHO HAVE PREVIOUSLY PRODUCED 72,000 PCS IN RAMIE/COTTON FOR THE US

MARKET. THEIR VIEW IS THAT RAMIE IS 'GOING TO BE BIG' IN THE US. MAHESH ADVISED RAMIE RICH SHIRTS & BLOUSES TO THE US ARE QUOTA FREE. A COMMENT WAS MADE ABOUT THE HANDLE OF THE CLOTH BEING HARSH, THE RAMIE WAS OF CHINESE ORIGIN. MAHESH SUGGESTED THAT AN EXCELLENT OPPORTUNITY EXISTS FOR RAMIE PRODUCT UTILIZATION IN SRI LANKA.

11. WINTER QUILTERS

WIKRAM AMALEAN

TEL: 727506/727507

HAVE USED HONG KONG ORIGIN RAMIE TO PRODUCE LADIES SUITS, THE HANDLE OF THE CLOTH WAS NOT CONSIDERED GOOD. THE FEELING HERE WAS THAT THE RAMIE 'LOOK' IS SET TO RETURN. THE FABRIC PURCHASED WAS 55% RAMIE, 45% COTTON, 51 X 47 CONSTRUCTION ON 11^s X 11^s YARNS, 43" WIDTH, COST PLAIN US\$ 1.45 CIF, PRINTED, US\$ 1.72 CIF MILL - TAI TUNG HING KEE IN HK

12. TROPICAL DESIGNS

ROY ANTHONY

TEL: 853433

EXPORTING TO US, NO USAGE OR KNOWLEDGE OF RAMIE

13. LIZ CLAIBORNE

WHILE UNABLE TO CONFIRM EXACT QUANTITY, ADVISED THAT SIGNIFICANT ORDERS ARE BEING PLACED IN RAMIE/COTTON FABRICS FOR PRODUCTION IN SRI LANKA. FABRIC NOT DOMESTIC.

MILLS VISITED

1. VEYANGODA TEXTILE MILLS LTD

KEERTHI NUGANIL TEL: 500267

SPINNERS AND WEAVERS, PRODUCING 1.8 MILLION MTRS/MONTH SOLELY FOR LOCAL MARKET. THIS IS DUE HAVING OLD LOOMS UNABLE TO PRODUCE EXPORT QUALITY. KEERTHI ADVISED THAT SPINNING, WEAVING, PRINTING AND DYING PROCESSES ARE THE SAME AS FOR COTTON. THE BIGGEST THREAT HE SUGGESTED COMES FROM IMPORTED FABRICS VERSUS THE COST OF DOMESTIC FABRIC EG. 60 X 60 SHEETING ON 20⁰ YARN COSTS US\$ 0.60 IN SRI LANKA, FROM HONG KONG US\$ 0.38 C.I.F, THE HONG KONG PRODUCT IS ALSO OF HIGHER QUALITY. CONTRIBUTING FACTORS TO THIS WERE CITED AS 1) HONG KONG'S GREATER EFFICIENCY AND HIGHER VOLUMES II) SRI LANKAN ELECTRICITY COSTS III) HIGH INTEREST RATE IN SRI LANKA - RESTRICTING MODERNISATION/GREATER EFFICIENCY. THE MILL IS INVOLVED IN THE CONVERSION OF IMPORTED GREIGE CLOTH FOR THE EXPORT MARKET. ON THE QUESTION OF POLYMER FIBRES, KEERTHI BELIEVES, NO THREAT EXISTS TO RAMIE DUE TO THE COST OF SYNTHETICS.

2. KABOOL LANKA

DON KANG/C.K. HUR TEL: 422048/423775

KABOOL IS THE LARGEST MILL IN SRI LANKA, PRODUCING ALMOST EXCLUSIVELY FOR EXPORT. WITHIN THEIR GROUP THEY HAVE USED CHINESE RAMIE, WHICH THEY STATED AS BEING OF VARIABLE QUALITY. THEY ARE CURRENTLY LOOKING FURTHER INTO RAMIE AND SUGGESTED THAT THEY COULD UTILIZE 10 - 20 TONNES OF FIBRE PER MONTH, IN A COTTONIZED STATE (40 MM STAPLE LENGTH) AS THEY DO NOT HAVE THE REQUIRED CUTTING MACHINERY. FABRIC PRICES IN SRI LANKA, IT WAS ADVISED REFLECT HIGH RAW MATERIAL COSTS, AND HIGH ELECTRICITY COSTS WHEN COMPARED TO THOSE COSTS IN INDIA AND PAKISTAN. TO OVERCOME THESE COSTS THEY TARGET "QUOTA FREE" FABRICS AND

UTILIZE THE GSP OPPORTUNITY. THE METHODS OF DYEING AND PRINTING ARE AS COTTON. KABOOL HAVE WORLD WIDE OFFICES AND ARE CONFIDENT THEY HAVE THE ABILITY TO MARKET THE PRODUCT BEYOND SRI LANKA i.e. SELLING YARN OVERSEAS. BOTH MR. KANG AND MR. HUR EXPRESSED INTEREST AND KNOWLEDGE ON THE TOPIC OF RAMIE. THEY SUGGESTED THAT THEY ARE CAPABLE OF ACHIEVING A GOOD HANDLE ON RAMIE RICH CLOTHS. WE DISCUSSED THE POSSIBILITY OF PRODUCING A RAMIE "MICRO FIBRE" WHICH THEY CONSIDERED AS HAVING POTENTIAL. KABOOL ALSO SEE A HUGE OPPORTUNITY FOR RAMIE IN SRI LANKA AS IT IS A VERY "COOL" CLOTH TO WEAR LIKE LINEN. THE ISSUE OF EXPORT DUTY (10%) ON DOMESTIC FIBRE WAS RAISED AND CONSIDERED A POTENTIAL THREAT TO COST EFFICIENCY, IT WAS THOUGHT THAT THE GOVERNMENT IS CURRENTLY OFFERING INCENTIVES TO AGRICULTURE PROJECTS AND MAY THEREFORE WAIVE THE DUTY.

3. SOUTH TEXTILES LANKA PVT LTD

WILFRED TAI

TEL: 439158

A NEW MILL NOT YET IN PRODUCTION AND THEREFORE HAVE NOT USED RAMIE. THEY ARE LOOKING TO SPECIALISE IN FABRIC PRODUCTION TO AVOID PRICE COMPETITION. THEY ARE SPINNING AND WEAVING BUT ONLY SELLING GREIGE CLOTH AND WILL ONLY USE RAMIE IF DEMANDED BY THEIR CUSTOMERS. THERE IS THE POTENTIAL FOR SOUTH TEXTILES TO PRODUCE VERY FINE YARNS (FOR MICRO FIBRES) FOR THE "LUXURY" MARKET. SOUTH TEXTILES ARE VIEWING THE MARKET BEFORE THEY DEVELOP ANY FURTHER.

OTHER CONTACTS

1. NOVOTEX AS - DENMARK

LEIF NORGAARD

FAX: 459721014

A MAJOR PRODUCER OF "ENVIRONMENTAL" CLOTHING IN EUROPE, WHERE THEY HOLD A VERY STRONG MARKET POSITION BASED ON "GREEN" PHILOSOPHY. THEY ARE LOOKING AT THE POTENTIAL OF USING RAMIE AND DEPENDANT ON PRICE MAY BE INTERESTED IN YARN FROM SRI LANKA. THE NATURAL PROCESSES EMPLOYED AT THE PLANTATION ARE IN SYMPATHY WITH THE NOVOTEX PHILOSOPHY.

2. GOTAGAMA TEXTILE MILL

MR. "RAMIE" GAJAVIRA ADVISED THAT THIS MILL IS "VERY INTERESTED" IN THE RAMIE CROP. I WAS UNFORTUNATELY UNABLE TO CONTACT ANYONE HERE.

4. SWOT ANALYSIS ON RAMIE PRODUCTION IN SRI LANKA

STRENGTHS : 1. LOCAL RAW MATERIAL SUPPLY

- I) ADDED FLEXIBILITY
 - II) REDUCED LEAD TIME
 - III) REDUCED DEPENDANCE ON IMPORTS
2. VERSATILITY OF THE FIBRE
3. HIGH YIELD CROP)
4. LOW COST OF PRODUCTION) TO BE
FIRMLY
5. MR. "RAMIE" GAJAVIRAS IN) ESTABLISHED &
CONFIRMED
- DEPTH KNOWLEDGE)
6. CHEAPER COST THAN LINEN BY APPROX 20%
7. PRODUCTION PROCESSES AS COTTON
8. TOTAL PLANT CONSUMPTION - CATTLE FODDER &
MEDICINE.
9. HANDLE/APPEARANCE OF THE FABRIC.

WEAKNESSES

- 1. THE HANDLE AND APPEARANCE OF THE
FABRIC.
- 2. THE LIMITED KNOWLEDGE AND USAGE OF
RAMIE IN SRI LANKA
- 3. CUTTING MACHINE NOT AVAILABLE IN SRI LANKA

OPPORTUNITIES

1. THE LIMITED USAGE OF RAMIE IN SRI LANKA.
2. GSP & QUOTA BENEFITS
3. REDUCE THE CHINESE DOMINATION
4. HIGH QUALITY AND, OR LOW COST FIBRE
5. HIGH QUALITY AND, OR LOW COST FABRIC
6. LINEN MARKET
7. ENVIRONMENTAL "GREEN" MARKET
8. KNITWEAR MARKET
9. THE GROWTH OF THE TEXTILE INDUSTRY IN SRI LANKA
10. EXCLUSIVITY, THE POTENTIAL TO MARKET AS "THE RAMIE" IN THE SAME WAY "BAIRD" LINEN OF IRELAND DOES IN THE LINEN MARKET.
11. TROPICAL MARKETS E.G. SRI LANKA
12. OLD COMMODITY PLANTATIONS ABLE ACCOMMODATE DEMAND AND SUPPLY LOW COST LABOUR
13. MARKETING

THREATS

1. COST, IMPLEMENTATION AND AVAILABILITY OF CUTTING MACHINE.
2. THE PRODUCTION OF FIBRE AND FABRIC THAT OFFERS NO ALTERNATIVE TO THE CHINESE PRODUCT IN TERMS OF PRICE AND QUALITY.
3. MARKETING
4. EXPORT DUTY ON DOMESTIC FIBRE
5. LINEN
6. LOYALTY TO CHINESE SOURCE
7. LIMITED KNOWLEDGE
8. FAILURE OF OTHER PROJECTS
9. CROP OUTPUT

CONCLUSION AND RECOMMENDATION

TO CONCLUDE I BELIEVE THAT A MARKET EXISTS FOR SRI LANKAN GROWN RAMIE. HOWEVER, THIS IS ONLY IF THE FOLLOWING THREATS DO NOT MATERIALIZE:

1. THE COST, AVAILABILITY AND IMPLEMENTATION OF THE CUTTING MACHINE TO PROVIDE 'COTTONIZED' FIBRE DOES NOT EFFECT THE VIABILITY OF THE PROJECT.
2. THE PRODUCTION OF FIBRE AND FABRIC THAT IS NON COMPETITIVE IN TERMS OF PRICE AND QUALITY. I BELIEVE THAT OPPORTUNITY EXISTS TO TAKE A SHARE OF THE RAMIE MARKET BY PROVIDING AN ALTERNATIVE TO THE EXISTING PRODUCERS. THIS IS TO PRODUCE EITHER; TOP QUALITY RAMIE WHERE PREMIUM PRICE COULD BE DEMANDED, OR TO UNDERCUT THE MARKET PRICE AT MARKET QUALITY, POTENTIALLY ATTRACTING HIGH VOLUME AND MARKET SHARE.

THE STRONGEST SUPPORT TO MY IDENTIFICATION OF A MARKET FOR RAMIE IN SRI LANKA COMES FROM KABOOL LANKA. MOST IMPORTANTLY THE MILL HAS THE DEMAND FOR RAMIE, BUT ALSO POSSES THE KNOWLEDGE, UNDERSTANDING AND TECHNOLOGY TO PRODUCE YARN AND FABRIC. KABOOL LANKA HAVE OFFICES THROUGHOUT THE WORLD AND THEREFORE BELIEVE THAT THEY HAVE THE CAPABILITY TO MARKET RAMIE EFFECTIVELY. THE ABILITY TO CAPITALIZE ON THE QUOTA OPPORTUNITY AND GSP BENEFIT TO THE US AND EC WOULD ASSIST IN ACCESSING 83% OF THE SRI LANKAN APPAREL EXPORT MARKET, ACCORDING TO 1992 FIGURES. I BELIEVE THAT FURTHER TO MY MEETINGS WITH MANY PEOPLE IN THE TEXTILE AND APPAREL INDUSTRY, THE INTERNATIONAL CONNECTION AND INFRASTRUCTURE OF KABOOL LANKA SUGGESTS THEY WOULD BE BEST POSITIONED TO PROVIDE A SRI LANKAN RAMIE INDUSTRY WITH THE DEMAND REQUIRED TO SUPPORT IT BEYOND ITS INITIAL DEVELOPMENTS STAGE.

REFERENCES : JOURNAL OF SRI LANKA CHAMBER OF GARMENT EXPORT

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RE CUTTING MACHINE, IT HAS BEEN VERY DIFFICULT TO GAIN DEFINITE INFORMATION, THE ONLY 'LEADS' I HAVE ARE THE FOLLOWING.

1. MR KIM, EMPLOYED IN KOREA AS A YARN AGENT TEL: 8225566182

2. MR KIM, IN KOREA TEL: 8825483917.

(BOTH THE ABOVE KNOWN BY KABOOL) BOTH 1 & 2 WILL BE ABLE TO GIVE INFORMATION ON THE CUTTING MACHINE ACCORDING TO KABOOL LANKA.

3. CHINESE NATIONAL COMPLETE PLANT MACHINERY IMPORT/EXPORT CO-OPERATION. TEL: BEIJING 445078/421666, MADAM LIN, CHIEF OF OPERATION. THIS COMPANY ARE THE SUPPLIERS OF PUGODA TEXTILES SPINNING MACHINES.

4. MR. GAJAVIRA HAS INFORMATION ON THE TOPIC AND WILL ADVISE.