

INDUSTRY DATA BOOK

2022



MANUFACTURING INDUSTRY
SECTORS



MINISTRY OF INDUSTRIES

INDUSTRY DATA BOOK - 2022

MINISTRY OF INDUSTRIES

Introduction

This first edition of the Industrial Data book 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.

Industrial development increases the productive capacity of the people and creates employment opportunities. An industrialized nation is always economically stronger and thus capable of shielding itself from any challenge. Industrial output, which enable an economy to produce more is the only route to sustainable economic growth in the long run. Thus, monitoring and improving industrial capability is a key public policy target.

This publication covers 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.

In this edition of the Data book, the Industry statistical references are developed for Manufacturing sectors, classified by the Ministry of Industries. 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.

As this edition of the Data book includes the estimates in 2021 as the final year, the period averages should be considered with a note of caution. While it is important to understand the negative impact to the economy from the COVID-19 pandemic, it will be necessary to exclude it to understand mid- to long-term economic growth trends. Some tables in the Data book provide estimates that reflect the impacts of the pandemic (e.g., in 2015–2020) and those that do not (in 2015– 2019 and 2019–2020). This edition effectively reflects the revisions to the official national accounts and other statistical data published through the beginning of 2015.

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Message from Honorable Dr. Ramesh Pathirana, Minister of Industries

While my Ministry is passing an important milestone with the publication of the Industrial Data Book 2022, let me express my vision towards creating a sustainable forum for industry stakeholder collaboration.

A major challenge faced by both policy makers and industrialists in Sri Lanka is not having easy access to accurate data and up to date information pertaining to industry performance. Such reliable series of data and processed information that highlight industry trends as well as emerging opportunities form the foundation for impactful strategic decision making. Investors in our industry sector, both local and foreign, look for such relevant information before making all types of prudent investment decisions.

Industry development strategies are futuristic. Hence, the ability to predict future events and trends is crucial across all industries. This strength enables the private sector to make the right investments that generate the right returns. It also helps the government in making right resource allocation decisions, maximizing benefits to the nation. This is extremely crucial now as Sri Lanka must manage its limited resources in the most optimal manner based on well-formulated strategies crafted based on unshakeable facts and verifiable information alone.

The aim of my Ministry, therefore, is to begin an effective and informed dialogue with the investor community through the preparation of this valuable publication which is expected to be a dynamic decision tool. As an initial step, this publication would fill certain existing gaps in industrial data. With valuable feedback coming from our clients, we will introduce a series of improvements to make this a genuine handbook to be kept on every investor 'stable, a quintessential decision tool. Such regular enhancements are essential because data science is an ever-evolving specialty with advanced analytics based on AI.

I wish to make Sri Lanka's industrial strategy formulation an informed process of sustained collaboration between the private sector, the government and academia. This publication is aimed at opening the doors wide open for such a mutually beneficial co-learning collaboration. The process we launch today, by releasing the Industrial Data Book 2022, will herald a new era in facilitating industrial and economic growth in Sri Lanka based on informed decisions.

Let me appreciate the efforts taken by the Secretary to the Ministry of Industries and his able team including the head of the Planning Division and his staff, and all the stakeholders in the industrial sector who are supporting our efforts. I wish all of you a great future.

Thank you.

Dr. Ramesh Pathirana M P

Minister of Industries

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.

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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

Ministry of Industries

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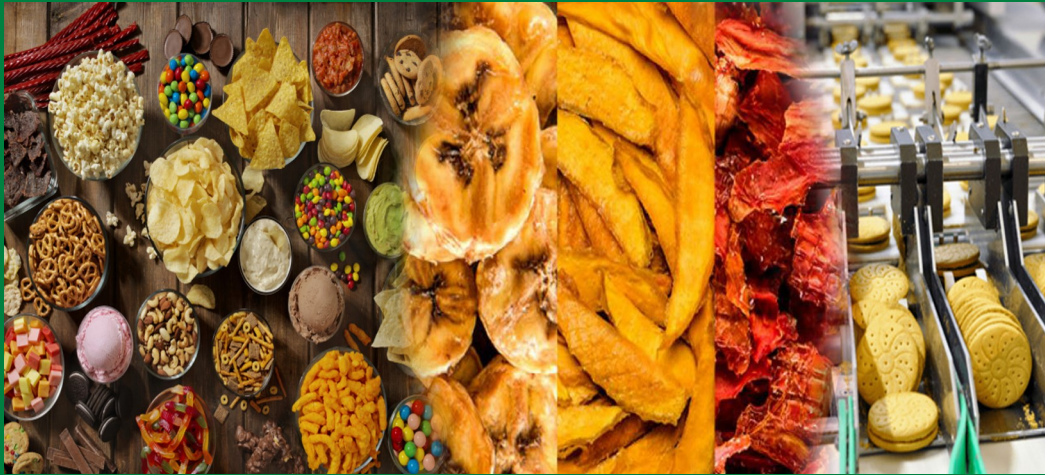
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Abbreviations

CIF	cost, insurance, and freight
Contd.	Continued
FOB	Free on Board
Kg	Kilogram
GDP	Gross Domestic Products
No	Number
n.e.c	Not elsewhere classified
-	Nil
('000) No	Thousand Number
('000) Pairs	Thousand Pairs
Ps.	Pairs
('000) Rs	Thousand Rupees
Qty.	Quantity
Rs.	Rupees
Rs. Mn	Rupees Million



1. PROCESSED FOOD AND BEVERAGE INDUSTRY

1.1. PROCESSED FOOD INDUSTRY

Overview

The Food and Beverage (F&B) industry is among the fastest growing industries in Sri Lanka and has been identified as one of the key priority sectors by the Government due to its potential to create market for export and its capability to generate employment opportunities. The processed food and beverage sector has the potential for expansion considering the increase in domestic and international demand. Recognizing the growing demand, Government has given a high priority to commercialization and value addition to agricultural produce, for minimizing pre/post-harvest wastage, generating employment and export growth. Size of the global F&B market was around USD 5.8 trillion in 2021.

Currently, Sri Lanka's F&B industry covers a wide range of products such as Processed Food, Processed vegetables, fruits, concentrates & juices, Rice, Cereals, Oil Seed and its Products, Beverages, Sugar, Sugar confectionery & bakery products and Coffee. Total value of F&B exports stands at USD 301.91 million by the end of 2021. The Sector Contributed around 2.47% to total merchandise exports in year 2021. Earnings from the merchandise exports increased by 18 per cent year over year (YoY) from USD 255.93 million in 2020 to USD 301.91 million in 2021. This is while receiving USD 45.47 million from India, the largest buyer of the F&B sector.

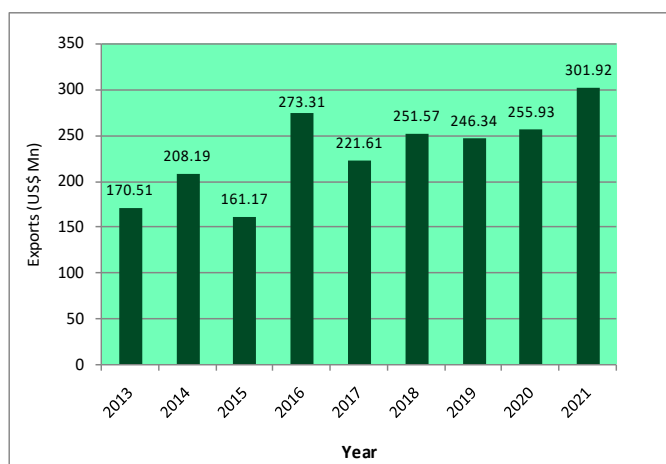
Main buyers of the food sector are Germany, France, Australia, Maldives, UAE and Ghana while India, New Zealand, China, Pakistan and Malaysia are major importing countries. Major export countries for beverages are India, USA, Yemen, UAE and Australia while Austria, Malaysia, Vietnam, Cyprus and Australia are major importing countries. Food sector contribution to GDP stands at approximately 5.1%. Beverage sector contribution to GDP stands at around 0.4%. F&B imports amounted to USD 1.24 billion in 2021 which is a 9 per cent in-

Processed food is the main contributor to exports with an export earning amounts to USD 161.2 million recorded in 2021. It is a 38 per cent increase compared to USD 117.61 million earned in 2020. Animal feed accounts for USD 142.07 million export earnings in 2021 which is a 49 per cent increase compared to USD 95.42 million earned in 2020.

To maintain food safety requirements of consumer's health these industries comply with international standards like ISO 9000, ISO 22000, HACCP, Halal, Kosher, Organic EU etc. so that the buyers can be assured that the product that the Sri Lankan industry supply meets the quality. The food and beverage industries of Sri Lanka work with International Food Processors Associations. They also participate in international trade fairs so as to be updated of new product technology, standards and regulations.

There are opportunities for the individual quick freezing (IQF) products considering the huge global demand. In the present global context, frozen food manufacturers are using technologies such as individual quick freezing (IQF) to improve the yield and quality of frozen foods. With the IQF method, every individual piece of food is frozen separately, as opposed to bulk or block freezing. This method boosts yield by 1.5-3% and results in better quality products with high nutritional value and less wastage. Examples of IQF foods include fruits such as Strawberries, Mangoes, Pineapple, Avocado and Banana. The global IQF vegetable market is expected to reach USD 13.4 billion by 2028, thus indicating significant demand for IQF food products in the future.

Diverse agro-climatic conditions support the production of diverse fruits and vegetables which in turn provides a good raw material base for food processing companies. The factors such as quality, taste and flavor which are unique to Sri Lankan products play a vital role in creating demand for Sri Lankan product worldwide. The logistical infrastructure within the country is satisfactory, which is an added advantage for exporting processed products to different countries. Sri Lankan Universities conduct advanced courses on Food Science and Technology to introduce qualified human resources to the industry. Sri Lanka is currently on an achieving path for investment in infrastructure, packaging and marketing.



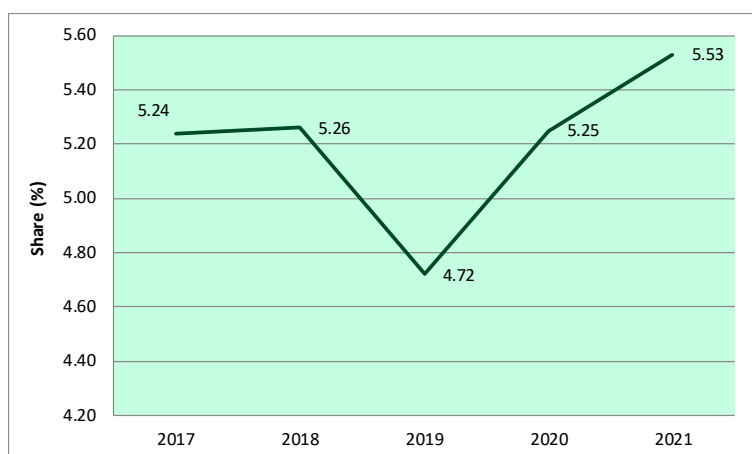
Source; Export Development Board

Figure 1.1.1: Exports Value of food products Industry

Table 1.1.1: Manufacture of Food 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 Constant GDP
2017	698,285	5.24	415,325	4.44
2018	752,003	5.26	437,274	4.52
2019	707,284	4.72	461,186	4.66
2020	788,936	5.25	485,347	5.09
2021	929,322	5.53	502,351	5.08

Source : Department of Census and Statistics



Processed Food Sector Contribution to GDP peaked at around 5.1% in 2020 from 4.7% recorded in 2019 and remained constant until 2021.

Source : Department of Census and Statistics

Figure 1.1.2: The Contribution of the Food Sector to the share of the manufacturing industry to the GDP

Table 1.1.2: Manufacturing Establishments and Number of Persons Engaged of Food Sector (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	2,261	23,576	1,853	257,025
2016	2,586	28,382	2,345	308,526
2017	2,669	27,240	2,388	305,587
2018	2,684	25,609	2,243	335,329
2019	3,781	27,540	1,974	334,595

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

Table 1.1.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Food Products (2015) - Establishments with 25 or more persons engaged

2015								
Size	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	1,243	6,964	4,640	1,199,783,515	15,601,916,901	10,574,597,783	5,027,319,118	352,415,811
10 to 99	2,563	111,034	108,295	25,585,957,070	706,956,745,357	505,673,693,771	201,283,051,587	13,175,432,531
100 & above	310	162,602	162,412	34,199,442,879	515,966,684,392	411,370,367,111	104,596,317,281	12,474,774,148
Group total	4,116	280,600	275,347	60,985,183,464	1,238,525,346,650	927,618,658,665	310,906,687,986	26,002,622,490

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

Table 1.1.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Food Products (2016) - Establishments with 25 or more persons engaged

2016								
Size	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	1,315	8,160	5,298	1,188,799,275	28,553,991,588	18,172,362,488	10,381,629,100	211,158,847
10 to 99	3,068	133,445	130,422	35,041,421,868	560,956,685,474	394,407,924,759	166,548,760,715	14,449,811,445
100 & above	548	195,303	194,934	51,192,886,214	766,437,608,354	565,708,076,100	200,729,532,254	23,952,283,199
Group total	4,931	336,908	330,654	87,423,107,357	1,355,948,285,416	978,288,363,347	377,659,922,069	38,613,253,491

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

Table 1.1.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Food Products (2017) - Establishments with 25 or more persons engaged

2017								
Size	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	1,463	8,401	4,399	1,085,730,791	11,912,422,112	7,850,264,480	4,062,157,631	137,223,260
10 to 99	3,026	130,819	127,736	38,939,081,531	752,263,177,581	502,739,993,553	249,523,184,028	17,974,583,434
100 & above	568	193,608	193,111	57,727,946,271	693,173,060,846	478,105,249,464	215,067,811,382	48,230,820,927
Group total	5,057	332,828	325,246	97,752,758,593	1,457,348,660,539	988,695,507,497	468,653,153,041	66,342,627,621

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

Table 1.1.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Food Products (2018) - Establishments with 25 or more persons engaged

2018								
Size	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	1,724	10,400	7,134	1,537,481,573	26,904,659,389	17,985,172,293	8,919,487,096	503,550,894
10 to 99	2,415	108,616	106,394	33,194,662,042	528,654,724,757	356,471,832,966	172,182,891,791	6,956,820,768
100 & above	788	241,922	241,224	78,363,222,346	1,021,592,007,729	685,002,364,031	336,589,643,699	48,151,615,243
Group total	4,927	360,938	354,752	113,095,365,961	1,577,151,391,875	1,059,459,369,290	517,692,022,586	55,611,986,905

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

Table 1.1.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Food Products (2019) - Establishments with 25 or more persons engaged

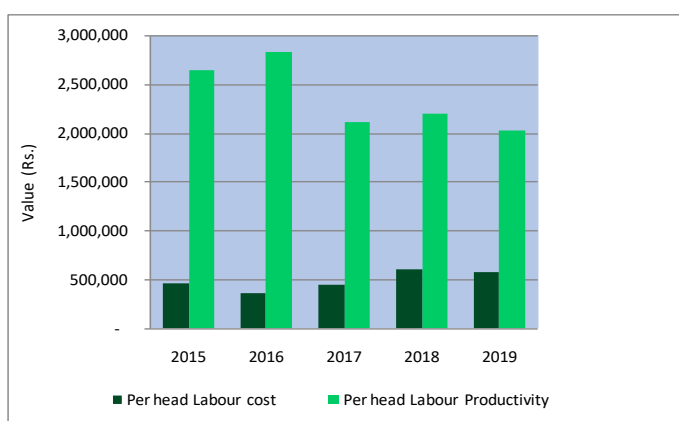
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	3,206	19,431	13,915	3,577,809,145	33,134,082,536	21,368,856,277	11,765,226,259	104,129,708
10 to 99	1,836	87,287	85,711	28,568,476,799	500,798,492,740	351,843,037,921	148,955,454,819	12,011,578,325
100 & above	713	255,416	254,820	88,578,217,602	1,044,587,598,566	711,092,788,486	333,494,810,079	55,397,663,866
Group total	5,755	362,134	354,447	120,724,503,546	1,578,520,173,842	1,084,304,682,684	494,215,491,157	67,513,371,899

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

Table 1.1.8: Manufacturing of Food Products Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	221,486	1,129,149	509.81
2016	264,395	1,142,160	431.99
2017	300,550	1,440,919	479.43
2018	318,801	1,459,307	457.75
2019	340,600	1,394,328	409.37

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



Source : Department of Census and Statistics

Figure 1.1.3: Manufacturing of Processed food Per head Labour Productivity

Although the per head labour cost of the Processed Food sector increased by 7% from 2018 to 2019, per head labour Productivity decreased by 4% in 2019 compared to 2018

Table 1.1.9: Value of Output & Output Components Classified by Industry of Food Products
- (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	1,154,561,459,412	1,121,537,530,991	(11,977,153,739)	45,001,082,156
2016	1,232,234,575,837	1,172,825,712,367	7,568,178,034	51,840,685,436
2017	1,319,274,618,024	1,230,843,307,620	7,599,535,172	80,831,775,232
2018	1,474,166,724,350	1,399,930,387,047	5,432,868,207	68,803,469,096
2019	1,492,517,657,899	1,455,821,550,253	12,117,894,120	24,578,213,525

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

Table 1.1.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Industry of Food Products
(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.)
2016	898,900,742,549	798,691,886,076	59,900,757,811	40,308,098,662
2017	900,980,926,315	786,956,907,744	70,861,057,121	43,162,961,450
2018	987,421,085,762	863,356,430,042	79,263,237,866	44,801,417,854
2019	1,034,274,777,535	887,276,590,785	86,588,216,703	60,409,970,046

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

Table 1.1.11: Employment by Nature of Employment & Gender Classified by Industry Division of Food Products
(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
2016	1,195	300	94	27	110,371	124,726	54,412	17,401	166,072	142,454
2017	1,275	325	128	106	102,742	115,024	58,620	27,368	162,765	142,822
2018	1,353	360	128	81	120,458	127,867	62,835	23,038	183,983	151,346
2019	1,018	255	89	24	111,848	112,562	74,265	34,534	187,221	147,374

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

Table 1.1.12: Economic Indicators of Industrial Activity Classified by Industry Class of Food Products

- (Establishments 25 or more 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
2016	4,358,914	1.558	3.326	1,561,780	0.558	1.192
2017	5,068,742	1.574	2.318	1,848,712	0.574	0.845
2018	4,021,425	1.430	2.111	1,208,418	0.430	0.634
2019	3,122,842	1.719	1.931	1,306,204	0.719	0.808

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

Table 1.1.13: Economic Indicators of Industrial Activity Classified by Industry Class of Food Products - 2016

(Establishments with Less than 25 persons engaged)

Industry class	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
Processing and preserving of meat	4,152,899	1.384	1.638	1,152,601	0.384	0.455
Processing and preserving of fish, Crustaceans and molluscs	6,943,815	1.396	7.965	1,969,151	0.396	2.259
Processing and preserving of fruit and vegetable	3,378,987	1.408	5.654	978,403	0.408	1.637
Manufacture of vegetable and animal oils and fats	11,539,200	1.297	6.032	2,642,584	0.297	1.381
Manufacture of dairy products	6,439,500	1.375	3.259	1,757,846	0.375	0.890
Manufacture of grain mill products. Starches and starch products	14,207,855	1.275	4.317	3,066,558	0.275	0.932
Manufacture of other food products	2,907,450	1.416	2.470	854,505	0.416	0.726
Manufacture of prepared animal feed	23,797,384	1.388	3.756	6,649,796	0.388	1.050

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

Table 1.1.14: Economic Indicators of Industrial Activity Classified by Industry Class of Food Products - 2017**(Establishments with Less than 25 persons engaged)**

Industry class	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
Processing and preserving of meat	4,140,203	1.485	1.658	2,497,001	0.485	0.541
Processing and preserving of fish, Crustaceans and molluscs	9,032,782	1.428	7.489	1,206,170	0.428	2.245
Processing and preserving of fruit and vegetable	3,275,328	1.411	2.527	1,295,881	0.411	0.737
Manufacture of vegetable and animal oils and fats	16,798,144	1.514	5.437	3,089,519	0.514	1.846
Manufacture of dairy products	5,792,870	1.435	3.211	1,804,013	0.435	0.973
Manufacture of grain mill products. Starches and starch products	12,329,746	1.458	4.791	2,573,295	0.458	1.506
Manufacture of other food products	3,253,098	1.462	2.684	1,212,211	0.462	0.848
Manufacture of prepared animal feed	21,434,762	1.588	3.590	5,970,381	0.588	1.329

*Source : Department of Census and Statistics , Annual Survey of Industries***Table 1.1.15: Economic Indicators of Industrial Activity Classified by Industry Class of Food Products - 2018****(Establishments with Less than 25 persons engaged)**

Industry class	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
Processing and preserving of meat	4,493,537	1.501	1.826	1,500,673	0.501	0.610
Processing and preserving of fish, Crustaceans and molluscs	11,854,248	1.593	9.867	4,413,962	0.593	3.674
Processing and preserving of fruit and vegetable	3,884,213	1.535	2.269	1,353,055	0.535	0.790
Manufacture of vegetable and animal oils and fats	12,450,984	1.407	2.901	3,603,434	0.407	0.840
Manufacture of dairy products	8,343,508	1.518	2.840	2,846,638	0.518	0.969
Manufacture of grain mill products. Starches and starch products	8,748,331	1.487	3.057	2,864,708	0.487	1.001
Manufacture of other food products	3,275,345	1.497	3.021	1,087,821	0.497	1.003
Manufacture of prepared animal feed	27,641,269	1.409	5.446	8,027,739	0.409	1.582

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

Table 1.1.16: Economic Indicators of Industrial Activity Classified by Industry Class of Food Products - 2019

(Establishments with Less than 25 persons engaged)

Industry class	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
Processing and preserving of meat	4,728,655	1.450	2.102	1,466,840	0.450	0.652
Processing and preserving of fish, Crustaceans and molluscs	4,412,771	1.435	2.288	1,337,160	0.435	0.693
Processing and preserving of fruit and vegetable	4,101,441	1.428	2.245	1,229,920	0.428	0.673
Manufacture of vegetable and animal oils and fats	14,802,753	1.277	3.140	3,215,457	0.277	0.682
Manufacture of dairy products	12,750,175	1.485	2.349	4,164,137	0.485	0.767
Manufacture of grain mill products. Starches and starch products	12,178,430	1.481	2.762	3,955,270	0.481	0.897
Manufacture of other food products	3,061,495	1.465	2.834	971,149	0.465	0.899
Manufacture of prepared animal feed	35,412,647	1.467	4.881	11,268,737	0.467	1.553

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

Table 1.1.17: Number of Processed Food Manufacturing Industries and Engaged Persons in Sri Lanka (2013/14 Economic Census)

Table 1.1.17.1: Processing and Preserving of Meat

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
Slaughtering, dressing, freezing and packing of animals' flesh other than poultry (Including by products)	41	100	5	44	-	-	1	600
Slaughtering, dressing, freezing and packing of poultry (Including By products)	31	54	1	6	3	195	2	938
Canning of meat	3	7	-	-	-	-	-	-
Production of meat products (Eg: Sausages, Ham)	5	10	1	21	3	327	1	416
Total	80	171	7	71	6	522	4	1,954

Source: Department of Census and Statistics

Table 1.1.17.2: Processing and Preserving of Fish, Crustaceans and Mollusks

(2013/14 Economic Census)

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 Es-tab.	No. of PE
Preparation and preservation of fish	55	118	6	43	2	128	-	-
Preparation and preservation of crustaceans and mollusks	3	7	4	34	4	255	-	-
Salting, drying and smoking of fish, (jadi)	1,851	3,346	184	1,105	13	475	-	-
Salting, drying and smoking of crustaceans and mollusks	2	4	1	6	-	-	-	-
Production of fish, crustacean and mollusk products (cooked fish, fish fillets, roes, caviar)	3	4	1	15	4	273	1	200
Canning of fish	1	4	6	98	7	381	-	-
Other fish products n.e.c.	228	477	23	137	2	92	-	-
Total	2,143	3,960	225	1,438	32	1,604	1	200

Source: Department of Census and Statistics

Table 1.1.17.3: Processing and Preserving of Fruit and Vegetable

(2013/14 Economic Census)

Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE
Preserving of fruits and nuts in oil or vinegar other than in sugar	2	5	2	12	1	25	1	322
Preserving of vegetables in oil or vinegar other than in sugar	7	12	2	15	1	148	-	-
Manufacture of food products of vegetable including packing and canning	9	16	-	-	1	25	-	-
Manufacture of food products of fruits including packing/canning and manufacture of jams, marmalades, table jel	35	68	7	59	6	308	4	1,340
Manufacture of Pickle and Chutneys etc.	100	139	6	58			-	-
Manufacture of fruit juices and their concentrates (cordial)	53	112	21	190	4	352	-	-
Processing, preserving and roasting of nuts potatoes, manioc (Potato/ manioc, snacks, roasted peanuts, dhal etc.	2,270	3,566	140	1,032	9	373	-	-
Manu. Of nut foods and pastes (peanuts butter)	14	27	9	107	2	50	1	211
Processing and preserving of other fruit and vegetable products n.e.c. (including Copra, Desiccated Coconut etc.)	787	1,493	70	529	34	2,604	2	1,200
Total	3,277	5,438	257	2,002	58	3,885	8	3,073

Source: Department of Census and Statistics

**Table 1.1.17.4: Manufacture of Vegetable and Animal Oils and Fats
(2013/14 Economic Census)**

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 Es-tab.	No. of PE
Manufacture of coconut oil	2,115	2,706	101	883	23	1,144	2	1,180
Manu. of other vegetable oils and fats from seeds(eg. sesame, soya)	95	163	6	55	3	309	-	-
Extraction of fish and marine mammal oils and fats	1	2	-	-	-	-	-	-
10404: Manu. of edible animal oils and fats	3	3	1	5	-	-	-	-
Manufacture of Margarine, hyco etc.	1	2	-	-	-	-	1	358
Manufacture of non edible animal oils and fats	7	16	-	-	-	-	-	-
Residual products of oil production (Such as oil cakes, poonac etc.)	8	18	-	-	-	-	-	-
Total	2,230	2,910	108	943	26	1,453	3	1,538

Source: Department of Census and Statistics

Table 1.1.17.5: Manufacture of Dairy Products

(2013/14 Economic Census)

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 Es-tab.	No. of PE
Manufacture of fresh liquid milk, pasteurized whether or not in bottle or packet (plain or flavour)	30	49	1	6	2	202	1	330
Manufacture of milk based drinks (eg. Milo)	3	3	-	-	-	-	-	-
Manu. Of milk powder or cream in solid form	1	3	-	-	1	150	4	1,328
Manufacture of concentrated milk whether or not sweetened	1	1	-	-	-	-	-	-
Manufacture of yoghurt and curd	1,559	2,372	80	638	14	736	2	1,135
Manufacture of butter, cheese, ghee	8	15	2	22	1	80	1	205
Manu. Of ice cream	370	614	25	205	2	65	1	256
Manu. Of other dairy products n.e.c.	48	81	13	113	1	85	1	1,470
Total	2,020	3,138	121	984	21	1,318	10	4,724

Source: Department of Census and Statistics

Table 1.1.17.6: Manufacture of Grain Mill Products

(2013/14 Economic Census)

Industry	Micro		Small		Medium		Large	
	No. of Es-tab.	No. of PE	No. of Estab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE
Manufacture of Rice (paddy/Rice Mill)	15,032	19,771	649	5,069	29	1,317	2	1,045
Production of flour (Grains and Cereals, including rice)	3,973	4,818	72	582	13	609	1	260
Manufacture of Coconut milk powder, manioc powder, powder of other nuts etc.)	1,031	1,351	10	63	6	323	-	-
Manufacture of cereal breakfast foods (Cerilak, Thriposha, samaposha, hopper/string hopper/thosa mixtures)	408	615	43	317	-	-	-	-
Other grain mill products n.e.c.	151	213	10	81	-	-	2	878
Manufacture of starches and starch products	-	-	-	-	-	-	-	-
Manufacture of starches from corn, rice, potatoes, maize etc. (used to thicken food items, to stiffen clothes etc	15	28	-	-	-	-	-	-
Manufacture of glucose, glucose syrup, maltose, inulin etc.	2	4	-	-	-	-	-	-
Manufacture of tapioca and tapioca substitutes prepared from starch	1	1	1	5	-	-	-	-
Manufacture of starches and starch products	223	390	17	105	1	179	1	347
Total	20,836	27,191	802	6,222	49	2,428	6	2,530

Source: Department of Census and Statistics

Table 1.1.17.7: Manufacture of Bakery Products

(2013/14 Economic Census)

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 Es-tab.	No. of PE
Manufacture of bread, bread rolls and buns	5,800	11,675	748	5,957	45	2,515	2	852
Manufacture of fresh pastry, pies, tarts, spaghetti etc.	105	158	1	5	1	100	-	-
Manufacture of rusks, biscuits and other dry bakery products	254	461	39	326	21	1,802	4	2,566
Manufacture of preserved pastry items	2	3	-	-	-	-	-	-
Manufacture of snack products, whether sweet or salted	403	563	10	62	1	38	-	-
Manufacture of cakes, wedding cakes and other cakes	887	1,047	20	184	5	250	1	278
Manu. Of other bakery products n.e.c.	116	202	6	60	1	26	-	-
Total	7,567	14,109	824	6,594	74	4,731	7	3,696

Source: Department of Census and Statistics

Table 1.1.17.8: Manufacture of Sugar**(2013/14 Economic Census)**

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 Es-tab.	No. of PE
Manufacture of sugar (sucrose) from cane	-	-	-	-	-	-	1	4,472
Manufacture of sugar syrups	3	6	-	-	-	-	-	-
Manufacture of molasses	1	1	-	-	-	-	-	-
Manufacture of honey and jaggery	2,169	2,995	38	250	2	103	-	-
Total	2,173	3,002	38	250	2	103	1	4,472

Source: Department of Census and Statistics

Table 1.1.17.9: Manufacture of Cocoa, Chocolate and Sugar Confectionery**(2013/14 Economic Census)**

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 Es-tab.	No. of PE
Manufacture of chocolate and chocolate confectionery	3	4	2	16	3	303	4	2,650
Manufacture of sugar confectionery such as toffee, chewing gum, lozenger etc.	80	119	8	95	7	454	1	200
Manufacture of other confectionery (eg. Boondhi, Puhul dosi, Dodol)	2,085	2,979	72	549	3	110	-	-
Preserving of fruit, nuts, fruit peels and other parts of plants in sugar (eg. Candied peel, Inguru dosi)	108	174	8	66	-	-	-	-
Manufacture of other confectionery n.e.c.	2,441	3,399	79	585	9	455	1	250
Total	4,717	6,675	169	1,311	22	1,322	6	3,100

Source: Department of Census and Statistics

Table 1.1.17.10: Manufacture of Macaroni, Noodles, Couscous and similar Farinaceous Products**(2013/14 Economic Census)**

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 Es-tab.	No. of PE
Manufacture of noodles, pastas, macaroni, nan, papadam etc. (Uncooked)	151	345	78	753	21	848	2	875
Manufacture of prepared meals and dishes except for immediate consumption (for resale)	127	171	13	116	1	27	-	-
Total	278	516	91	869	22	875	2	875

Source: Department of Census and Statistics

Table 1.1.17.11: Manufacture of Other Food Products

(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
Manufacture of Tea	312	785	130	1,500	480	33,231	60	26,835
Manufacture of blended /flavoured tea and tea bags	22	32	12	154	9	566	2	588
Production of coffee products	28	34	4	43	1	37	-	-
10794: Manufacture of soup cubes and broths	2	3	-	-	-	-	-	-
Manufacture of spices, sauces and condiments	4,957	6,522	118	1,025	28	1,384	2	711
Manufacture of vinegar, yeast, baking powder, caramel etc.	29	50	4	40	1	27	-	-
Manufacture of perishable food items for resale such as sandwiches, fresh uncooked Pizza and Manufacture of egg p	53	88	2	13	-	-	-	-
Processing of salt into food-grade salt (iodized salt)	50	106	29	295	8	352	3	1,092
Manufacture of other food products n.e.c.	119	178	18	127	3	420	-	-
Total	5,572	7,798	317	3,197	530	36,017	67	29,226

Source: Department of Census and Statistics

Table 1.1.17.12: Manufacture of Prepared Animal Feed

(2013/14 Economic Census)

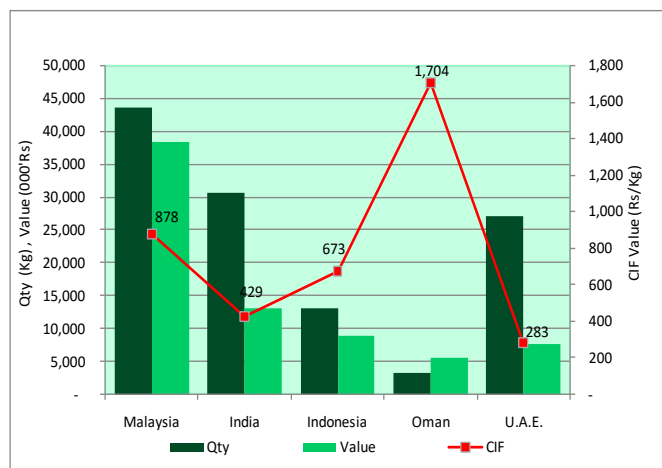
Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of prepared feeds for pets, including dogs, cats, birds, fish etc.	31	80	9	87	7	325	1	220
Manufacture of prepared feeds for farm animals, including animal feed concentrates and feed supplements	114	265	20	172	5	330	-	-
Total	145	345	29	259	12	655	1	220

Source: Department of Census and Statistics

Table 1.1.18: Processed Food Imports (2019-2021)

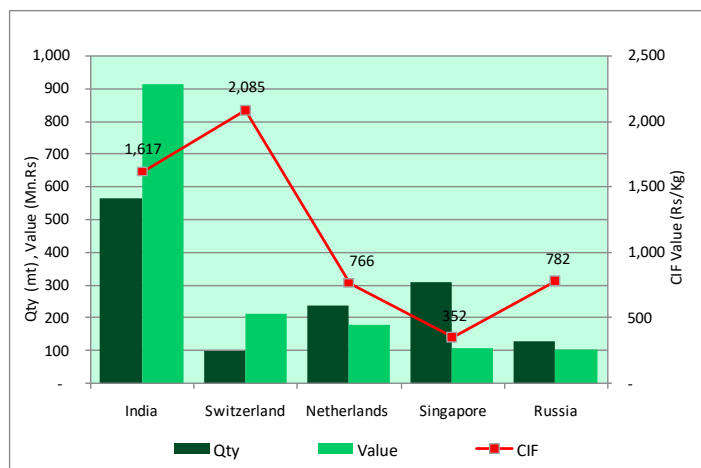
Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Bakery Products	MT	1,391	455	437	181	176	94
Confectionary Manufacturing	MT	2,519	2,407	1,491	1,114	2,738	2,189
Cereals and Pulses	MT	1,470,845	85,115	1,718,858	101,194	1,736,225	133,723
Dairy Products	MT	99,112	55,751	102,597	62,086	88,779	63,280
Beverages	MT	8,554	9,583	6,792	9,316	8,138	12,443
Beverages	('000) Liters	3,156	686	1,910	400	3,011	812
Coconut Based Products	MT	7,384	2,092	5,718	1,779	5,122	1,980
Fruits and Vegetables	MT	153,788	9,004	137,123	10,075	125,939	10,363
Fish & Meat	MT	18,651	7,519	12,875	4,720	10,200	3,436
Other Food Products	MT	271,045	22,033	156,232	19,353	89,810	18,394
Total	MT	2,033,288	193,959	2,142,123	209,818	2,067,126	245,901
Total	('000) Liters	3,156	686	1,910	400	3,011	812
Grand Total			194,645		210,219		246,713

Source: Sri Lanka Customs



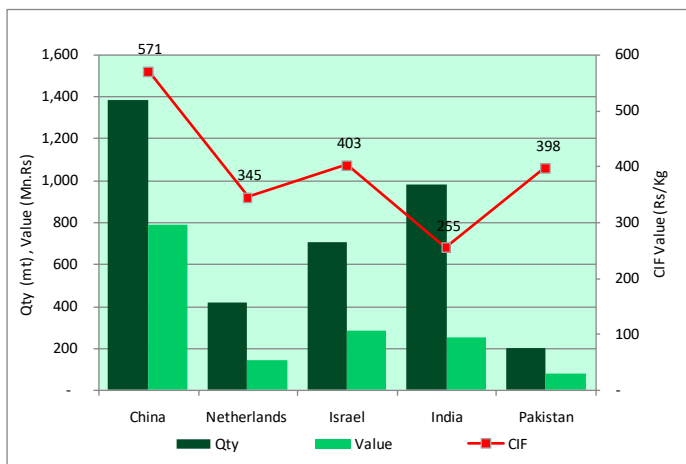
Source: Sri Lanka Customs

Figure 1.1.4: Major Imports Countries of Bakery Products - 2021



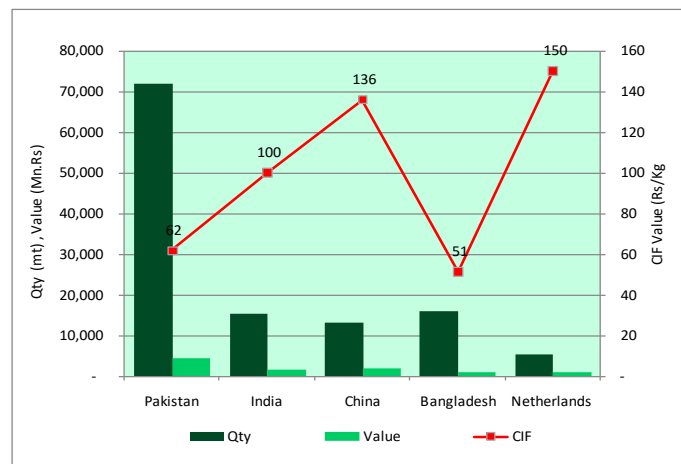
Source: Sri Lanka Customs

Figure 1.1.5: Major Imports Countries of Confectionary Manufacturing - 2021



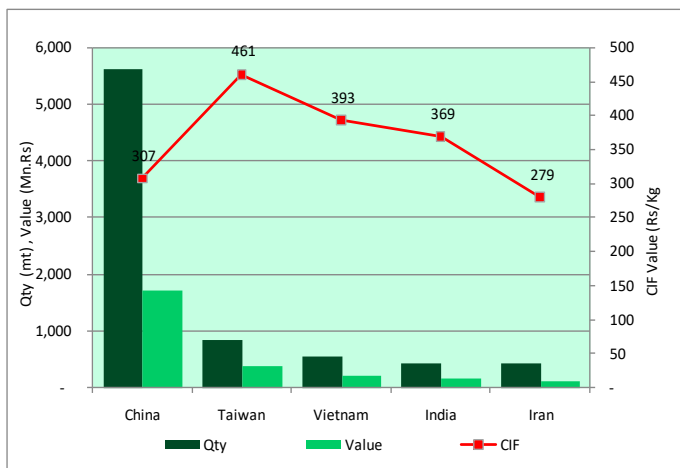
Source: Sri Lanka Customs

Figure 1.1.6: Major Imports Countries of Coconut Based Products - 2021



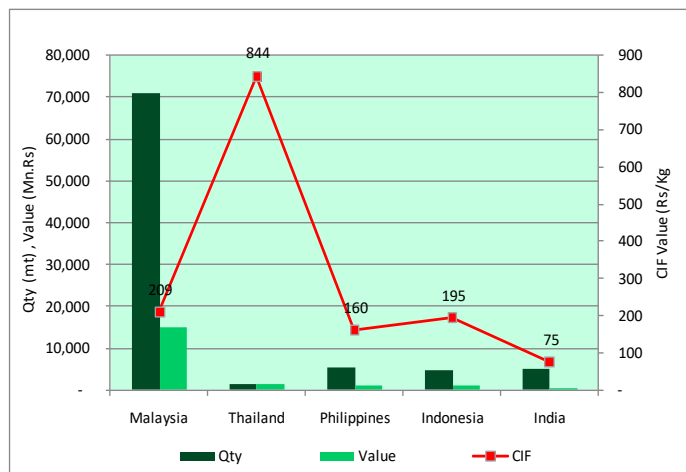
Source: Sri Lanka Customs

Figure 1.1.7: Major Imports Countries of Fruits and Vegetables - 2021



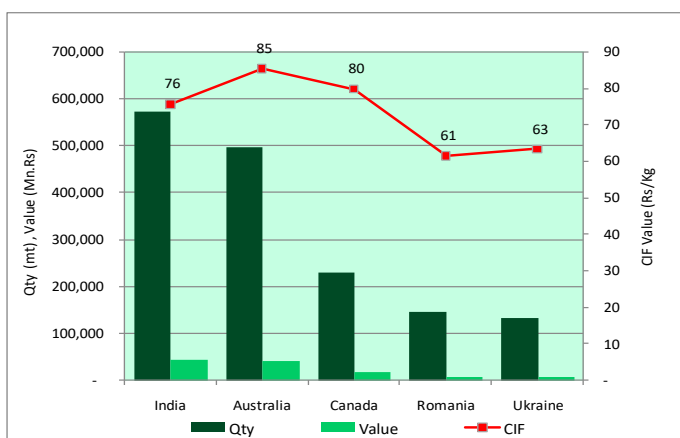
Source: Sri Lanka Customs

Figure 1.1.8: Major Imports Countries of Fish & Meat - 2021



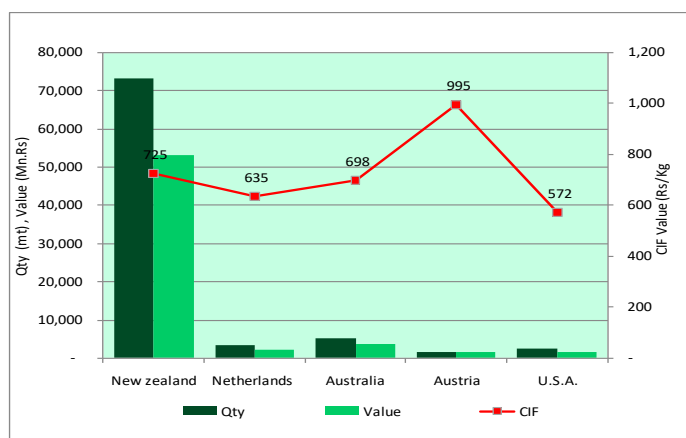
Source: Sri Lanka Customs

Figure 1.1.9: Major Imports Countries of Other Food Products - 2021



Source: Sri Lanka Customs

Figure 1.1.10: Major Imports Countries of Cereals and Pulses - 2021



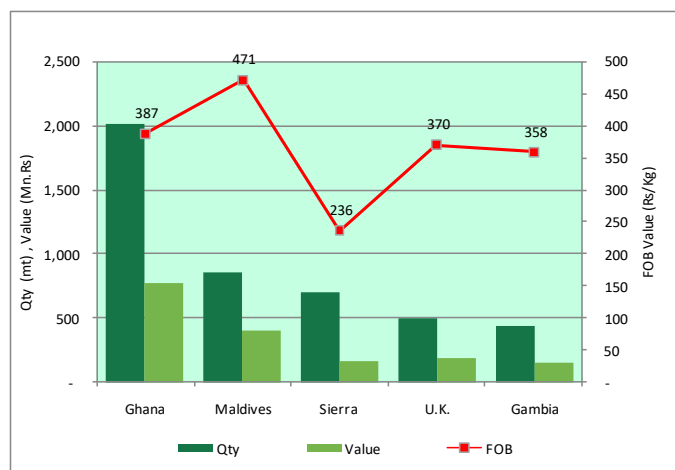
Source: Sri Lanka Customs

Figure 1.1.11: Major Imports Countries of Dairy Products - 2021

Table 1.1.19: Processed Food Exports (2019-2021)

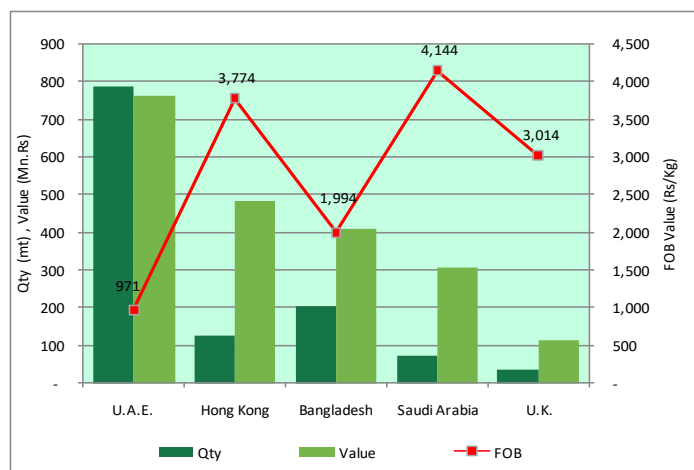
Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Bakery Products	MT	7,764	2,572	7,133	2,539	8,648	3,449
Confectionary Manufacturing	MT	975	827	767	839	1,439	2,307
Cereals and Pulses	MT	90,643	7,547	114,549	10,900	99,298	9,951
Dairy Products	MT	1,791	804	1,313	873	2,126	1,277
Beverages	MT	9,027	9,980	8,060	12,584	10,292	14,602
Beverages	('000) Liters	17,362	1,857	12,804	1,423	19,854	2,539
Coconut Based Products	MT	141,028	40,574	138,140	47,050	167,109	66,809
Fruits and Vegetables	MT	77,672	26,810	96,675	34,158	114,580	47,184
Fish & Meat	MT	19,943	34,350	13,882	25,530	16,163	37,249
Other Food Products	MT	207	37	114	31	106	36
Total	MT	349,051	123,501	380,633	134,505	419,760	182,865
Total	('000) Liters	17,362	1,857	12,804	1,423	19,854	2,539
Grand Total			125,358		135,928		185,404

Source: Sri Lanka Customs



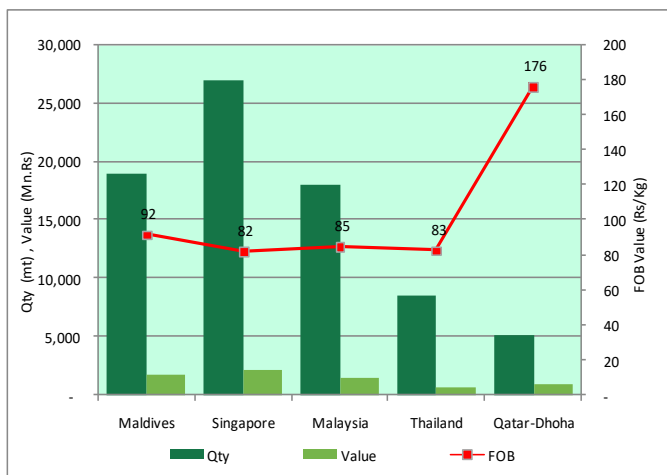
Source: Sri Lanka Customs

Figure 1.1.12: Major Exports Countries of Bakery Products - 2021



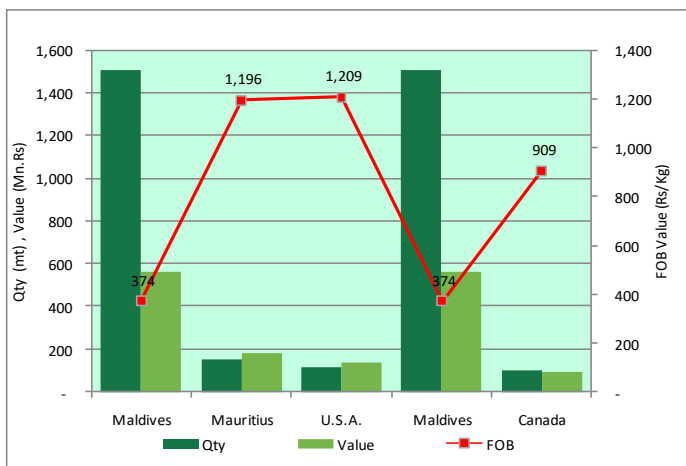
Source: Sri Lanka Customs

Figure 1.1.13: Major Exports Countries of Confectionary Manufacturing - 2021



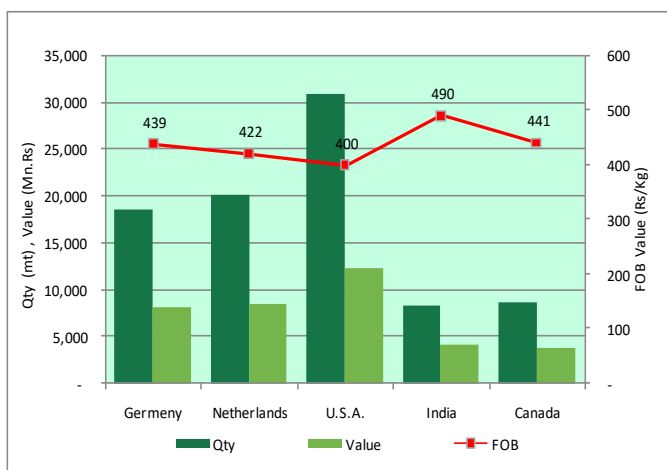
Source: Sri Lanka Customs

Figure 1.1.14: Major Exports Countries of Cereals and Pulses - 2021



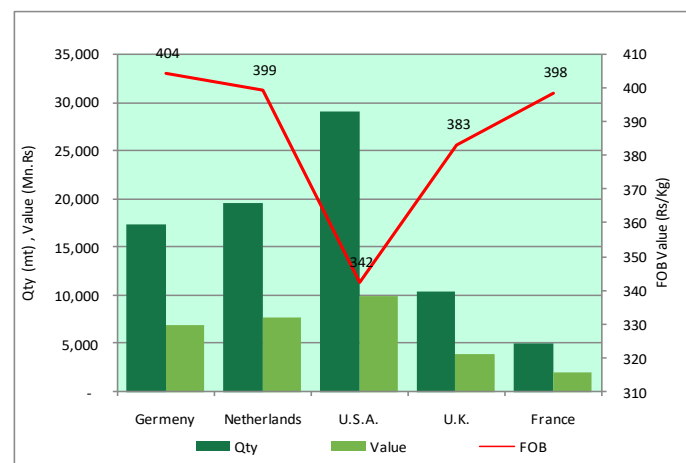
Source: Sri Lanka Customs

Figure 1.1.15: Major Exports Countries of Dairy Products - 2021



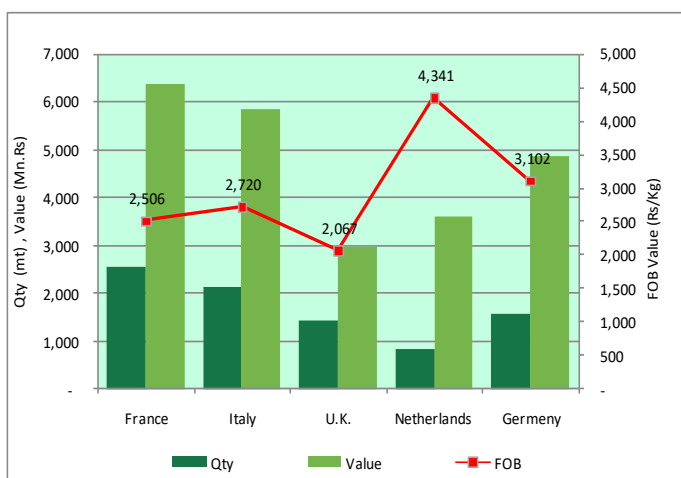
Source: Sri Lanka Customs

Figure 1.1.16: Major Exports Countries of Coconut Based Products - 2021



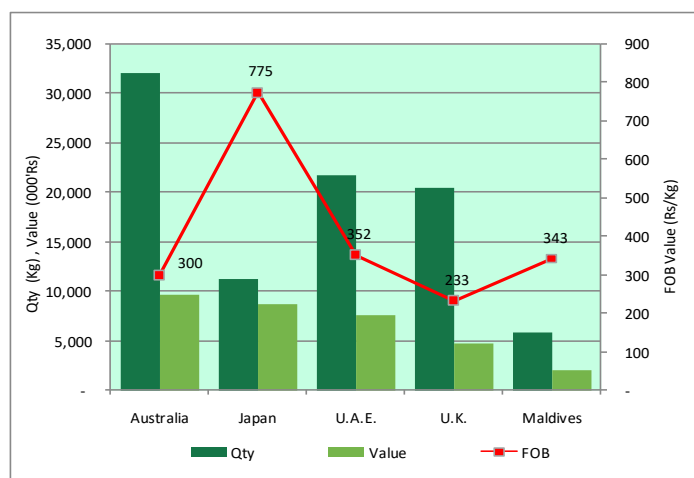
Source: Sri Lanka Customs

Figure 1.1.17: Major Exports Countries of Fruits and Vegetables - 2021



Source: Sri Lanka Customs

Figure 1.1.18: Major Exports Countries of Fish & Meat - 2021



Source: Sri Lanka Customs

Figure 1.1.19: Major Exports Countries of Other Food Products - 2021

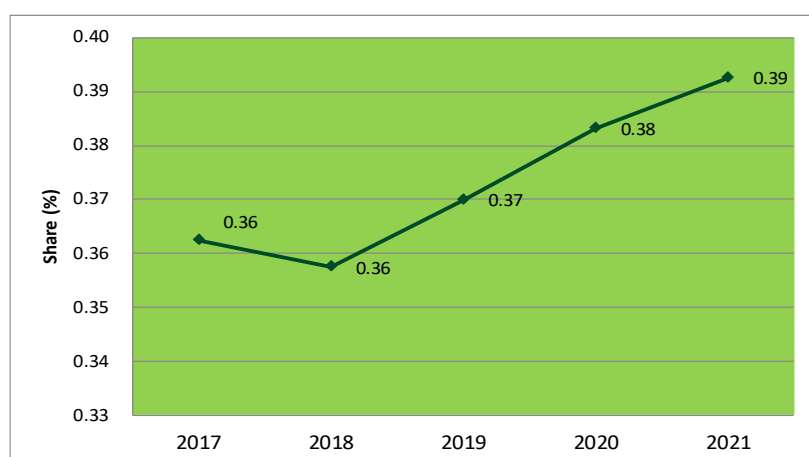


1.2. BEVERAGE INDUSTRY

Table 1.2.1: Manufacture of Beverages Sector Contributions to the GDP at Current and Constant Market Price (2017 - 2021)

Year	Current		Constant	
	Contribution Value (Rs. Mn)	Share (%) of Total Current GDP	Contribution Value (Rs. Mn)	Share (%) of Total Constant GDP
2017	33,909	0.36	36,593	0.31
2018	34,543	0.36	27,443	0.21
2019	36,578	0.37	28,050	0.2
2020	36,519	0.38	23,469	0.16
2021	38,788	0.39	24,195	0.16

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 1.2.1: The Contribution of the Beverage sector to the share of the manufacturing industry to the GDP

Table 1.2.2: Manufacturing Establishments and Number of Persons Engaged of Beverages Sector (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	87	1,140	66	6,499
2016	58	867	83	7,167
2017	62	747	146	9,714
2018	99	1,222	74	9,496
2019	80	1,049	107	11,529

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

Table 1.2.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Beverages (2015) - Establishments with 25 or more persons engaged

2015								
Size	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	17	116	114	27,249,093	90,430,072	44,136,327	46,293,745	4,618,810
10 to 99	122	3,570	3,432	1,546,861,418	14,440,141,539	8,498,647,281	5,941,494,259	1,759,393,716
100 & above	14	3,954	3,951	1,832,287,603	73,680,746,643	59,832,801,823	13,847,944,820	3,756,167,458
Group total	153	7,640	7,497	3,406,398,114	88,211,318,254	68,375,585,431	19,835,732,824	5,520,179,984

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

Table 1.2.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Beverages (2016) - Establishments with 25 or more persons engaged

2016								
Size	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	16	99	76	11,393,706	47,280,650	25,017,665	22,262,985	5,391,000
10 to 99	105	3,055	2,847	560,113,549	13,970,537,331	10,851,968,016	3,118,569,315	399,529,882
100 & above	20	4,880	4,870	2,242,329,870	83,222,539,811	64,355,483,950	18,867,055,860	2,425,778,616
Group total	141	8,034	7,793	2,813,837,125	97,240,357,792	75,232,469,631	22,007,888,160	2,830,699,498

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

Table 1.2.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Beverages (2017) - Establishments with 25 or more persons engaged

2017								
Size	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	27	172	123	22,041,627	91,958,856	60,817,265	31,141,591	1,015,759
10 to 99	162	4,875	4,660	1,046,323,770	15,768,998,523	11,127,576,926	4,641,421,598	2,259,823,456
100 & above	19	5,415	5,402	3,496,861,034	75,355,838,411	58,584,432,431	16,771,405,980	5,073,523,368
Group total	208	10,462	10,185	4,565,226,431	91,216,795,790	69,772,826,622	21,443,969,169	7,334,362,583

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

Table 1.2.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Beverages (2018) - Establishments with 25 or more persons engaged

2018								
Size	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	46	305	241	47,949,002	224,145,096	151,003,332	73,141,764	3,271,057
10 to 99	106	3,170	3,030	1,318,862,322	14,771,922,510	10,839,762,205	3,932,160,305	2,936,787,006
100 & above	22	7,244	7,232	4,901,532,795	79,972,774,816	60,896,495,533	19,076,279,283	11,094,340,729
Group total	173	10,7189	10,503	6,268,344,119	94,968,842,423	71,887,261,070	23,081,581,352	14,034,398,792

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

Table 1.2.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Beverages (2019) - Establishments with 25 or more persons engaged

2019								
Size	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	22	139	110	24,720,950	131,934,662	65,846,306	66,088,356	-
10 to 99	140	3,510	3,387	972,546,313	6,777,041,551	4,182,622,021	2,594,419,530	91,401,089
100 & above	25	8,928	8,919	6,123,121,570	89,752,735,349	67,220,602,683	22,532,132,666	11,444,583,386
Group total	187	12,577	12,416	7,120,388,833	96,661,711,562	71,469,071,010	25,192,640,552	11,535,984,475

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

Table 1.2.8: Value of Output & Output Components Classified by Industry of Beverages (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	80,736,591,344	76,355,279,817	2,662,981,415	1,718,330,112
2016	95,709,255,557	93,646,595,829	823,147,599	1,239,512,129
2017	88,591,083,799	86,849,275,312	295,940,234	1,445,868,253
2018	92,178,003,689	89,727,694,446	248,832,990	2,201,476,252
2019	95,480,497,749	91,588,160,350	962,382,887	2,929,954,513

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

Table 1.2.9: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Industry of Beverages

Year	Intermediate consumption (Rs.)	Raw materials consumed (Rs.)	Cost of industrial services done by others & other payments (Rs.)	Electricity & fuel consumed (Rs.)
2015	62,818,748,132	29,799,692,713	32,245,527,603	773,527,816
2016	74,142,265,853	52,962,424,676	20,039,771,910	1,140,069,267
2017	68,312,251,106	51,060,466,213	16,069,191,814	1,182,593,078
2018	69,718,249,202	50,586,554,519	17,502,347,264	1,629,347,418
2019	70,778,202,177	52,354,876,035	16,858,437,774	1,564,888,367

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

Table 1.2.10: Employment by Nature of Employment & Gender Classified by Industry Division of Beverages - (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	19	9	37	2	2282	1221	2303	627	4640	1859
2016	55	17	108	-	2468	973	2921	625	5552	1615
2017	147	24	-	-	2994	1354	4293	903	7434	2280
2018	39	17	6	3	3090	1145	4596	600	7731	1765
2019	29	10	18	0	3947	1404	5140	979	9135	2394

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

**Table 1.2.11: Categories of Employees by Nature of Employment Classified by Beverage Industry
(Establishments with 25 or more persons engaged)**

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	6,432	2,735	768
2016	6,987	2,666	776
2017	9,543	3,137	1,210
2018	9,431	2,477	1,758
2019	11,471	3,397	1,955

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

**Table 1.2.12: Number of Manufacturing of Beverage Industries and Engaged Persons in Sri Lanka
(2013/14 Economic Census)**

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	
	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons
2016	1,765,977	13,354,531	1.404	1.291	2.106	2.337	508,533	3,009,291	0.404	0.291	0.606	0.527
2017	3,514,073	9,119,751	1.798	1.297	1.515	2.232	1,559,339	4,086,787	0.798	0.297	0.672	0.511
2018	2,283,829	9,707,035	1.287	1.322	2.888	1.255	508,860	2,365,181	0.287	0.322	0.643	0.306
2019	1,126,253	8,282,040	1.710	1.349	0.995	1.665	467,530	2,142,693	0.710	0.349	0.413	0.431

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

**Table 1.2.13: Number of Manufacturing of Beverage Industries and Engaged Persons in Sri Lanka
(2013/14 Economic Census)**

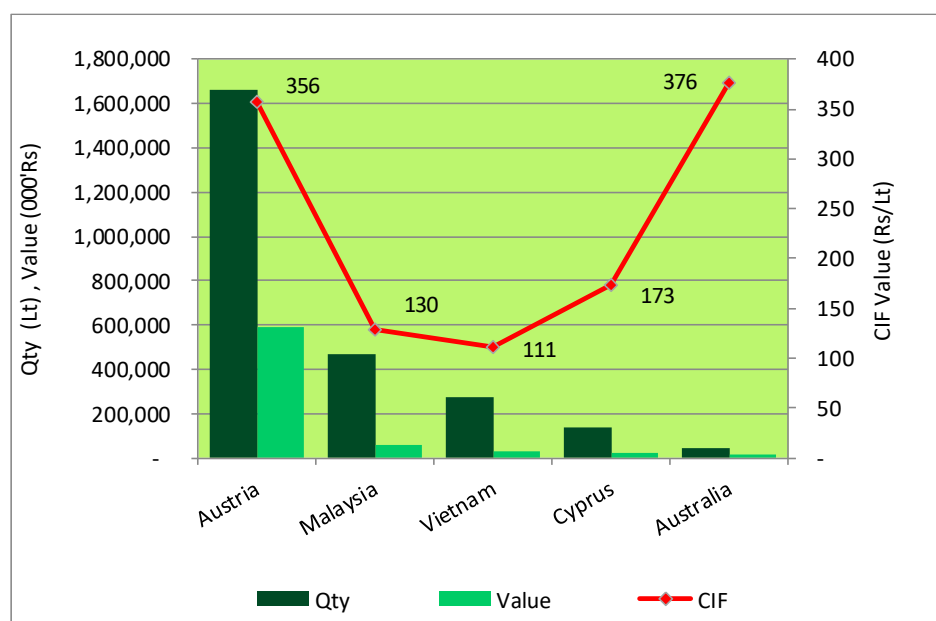
Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of arrack, Whisky, Brandy, Gin etc.	4	7	9	153	10	731	4	1206
Manufacture of illegal liquors	20	31	1	7	-	-	-	-
Manufacture of wine	2	2	3	44	1	86	-	-
Manufacture of toddy (exclude toddy tapping)	15	28	14	207	1	31	-	-
Manufacture of beer	1	4	1	10	3	482	1	400
Manufacture of other malt liquors and malt n.e.c.	-	-	1	23	-	-	-	-
Manufacture of soft drinks, soda, fruit drinks, tonics etc.	117	191	23	228	10	613	5	2685
Production of natural mineral waters and bottled waters	22	47	58	682	13	527	1	200
Manufacture of Popsicles, drink packets etc.	195	251	3	18	-	-	-	-
Manufacture of other non-alcoholic beverages except non alcoholic beer and wine	5	8	-	-	-	-	-	-
Total	381	569	113	1372	38	2470	11	4491

Source: Department of Census and Statistics

Table 1.2.14: Imports of Beverages (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Waters, including natural or artificial mineral water and aerated waters, not containing added sugar or other sweetening matter nor flavored; ice and snow	('000) Liters	387	60	42	7	21	10
Waters, including mineral waters and aerated waters, containing added sugar or other sweetening matter or flavored, and other non-alcoholic beverages, not including fruit or vegetable juices of heading 20.09.	('000) Liters	2,768	625	1,867	392	2,989	801
Food preparations not elsewhere specified or included.	MT	8,553	9,582	6,791	9,315	8,137	12,443
Total	MT	8,553	9,582	6,791	9,315	8,137	12,443
Total	('000) Liters	3,155	685	1,909	400	3,010	811
Grand Total			10,267		9,715		13,254

Source: Sri Lanka Customs



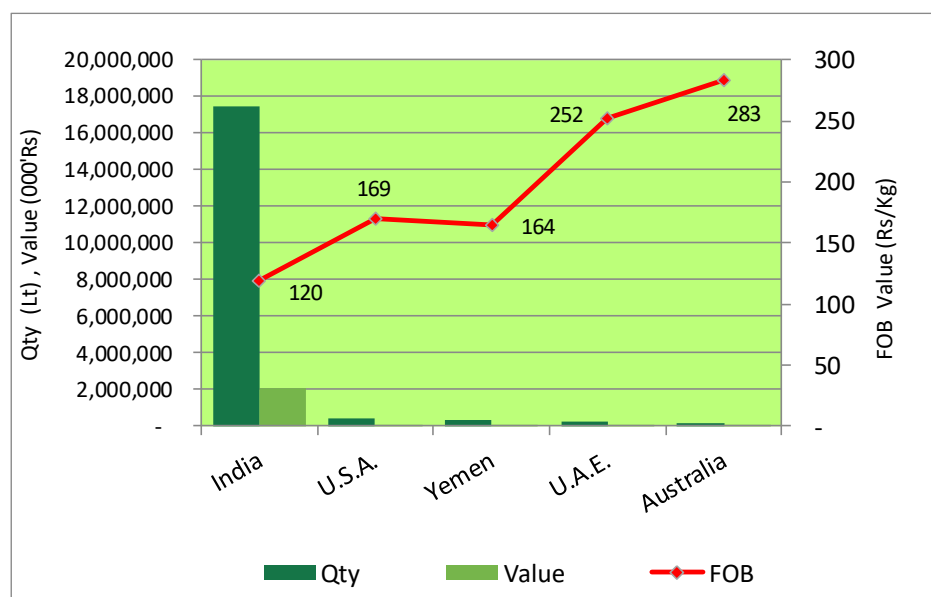
Source: Sri Lanka Customs

Figure 1.2.2: Major Imports Countries of Beverages - 2021

Table 1.2.15: Exports of Beverages (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Waters, including natural or artificial mineral water and aerated waters, not containing added sugar or other sweetening matter nor flavored; ice and snow	('000) Liters	239	20	873	34	335	35
Waters, including mineral waters and aerated waters, containing added sugar or other sweetening matter or flavored, and other non-alcoholic beverages, not including fruit or vegetable juices of heading 20.09.	('000) Liters	17,122	1,836	11,930	1,388	19,518	2,503
Food preparations not elsewhere specified or included.	MT	9,026	9,980	8,059	12,583	10,291	14,601
Total	MT	9,026	9,980	8,059	12,583	10,291	14,601
Total	('000) Liters	17,361	1,856	12,803	1,423	19,854	2,539
Grand Total			11,836		14,006		17,140

Source: Sri Lanka Customs



Source: Sri Lanka Customs

Figure 1.2.3: Major Exports Countries of Beverages - 2021



2. TEXTILE AND WEARING APPAREL INDUSTRY

2.1. TEXTILE INDUSTRY

Overview

Textile and clothing industries have been the 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 an 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 wear.

Total value of apparel exported 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 million 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%.

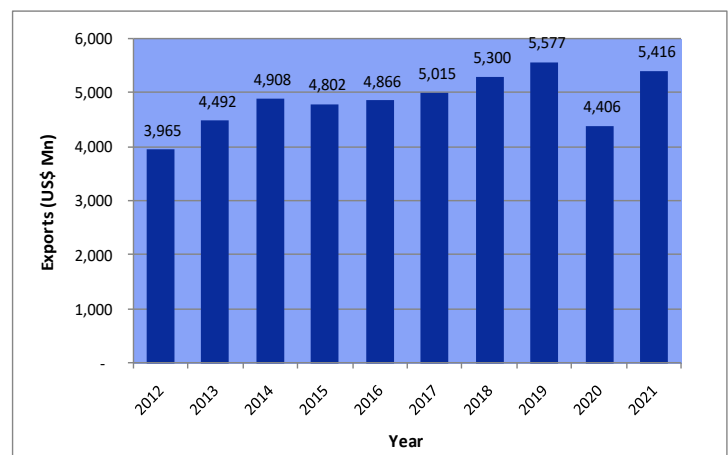
There are around 300 manufacturers of apparel in the sector. The industry provides direct employment for about 350,000 people and indirect employment for about 1.0 million people in support activities which include a substantial number of women in Sri Lanka. Apparel sector imports accounts for USD 2.22 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 that's manufactured in Sri Lanka falls 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 million 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.



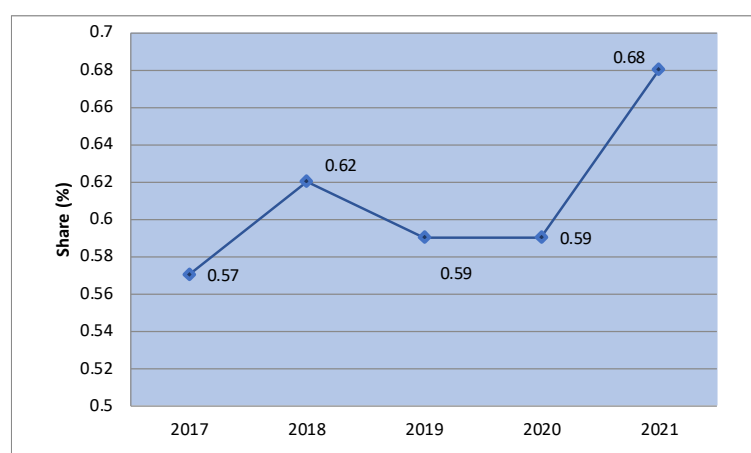
Source; Export Development Board

Figure 2.1.1: Exports Value of Apparel Industry

Table 2.1.1: 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



Source: Department of Census and Statistics

Figure 2.1.2: The Contribution of the Textile sector to the share of the manufacturing industry to the GDP

Table 2.1.2: 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 2.1.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Textile Industry (2015) - (Establishments with 5 or more engaged)

2015								
Size	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 2.1.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Textile Industry (2016)- (Establishments with 5 or more engaged)

2016								
Size	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 2.1.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Textile Industry (2017) - (Establishments with 5 or more engaged)

2017								
Size	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 2.1.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Textile Industry (2018)- (Establishments with 5 or more engaged)

2018								
Size	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 2.1.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Textile Industry (2019) - (Establishments with 5 or more engaged)

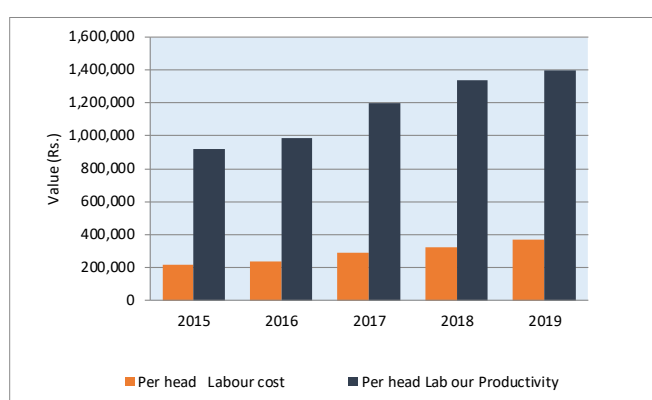
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	1,110	6,906	5,019	1,081,437,721	5,246,890,320	2,307,642,702	2,939,247,618	10,630,307
10 to 99	741	17,754	17,001	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 2.1.8: 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 2.1.3: Manufacturing of Textile Per head Labour Productivity

Labour Productivity of the Apparel sector has increased over the period. The figure has increased by 421 from year 2016 to 2019.

**Table 2.1.9: 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 2.1.10: 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 2.1.11: 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 2.1.12: 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 2.1.13: Economic Indicators of Textile Industrial Activity Classified by Industry Class - (Establishments with 25 or more persons engaged)

Table 2.1.13.1: 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 2.1.13.2: 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 2.1.14: 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 2.1.15: Number of Manufacturing of Textile Industries and Engaged Persons in Sri Lanka
(2013/14 Economic Census)**

Table 2.1.15.1: 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

Table 2.1.15.2: Weaving of Textiles

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 Es-tab.	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

Table 2.1.15.3: Finishing of Textiles

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 Es-tab.	No. of PE
Bleaching and dying 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

Table 2.1.15.4: 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

Table 2.1.15.5: 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

Table 2.1.15.6: 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

Table 2.1.15.7: Manufacture of Twine, Cordage, Rope and Cables of Coir 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
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

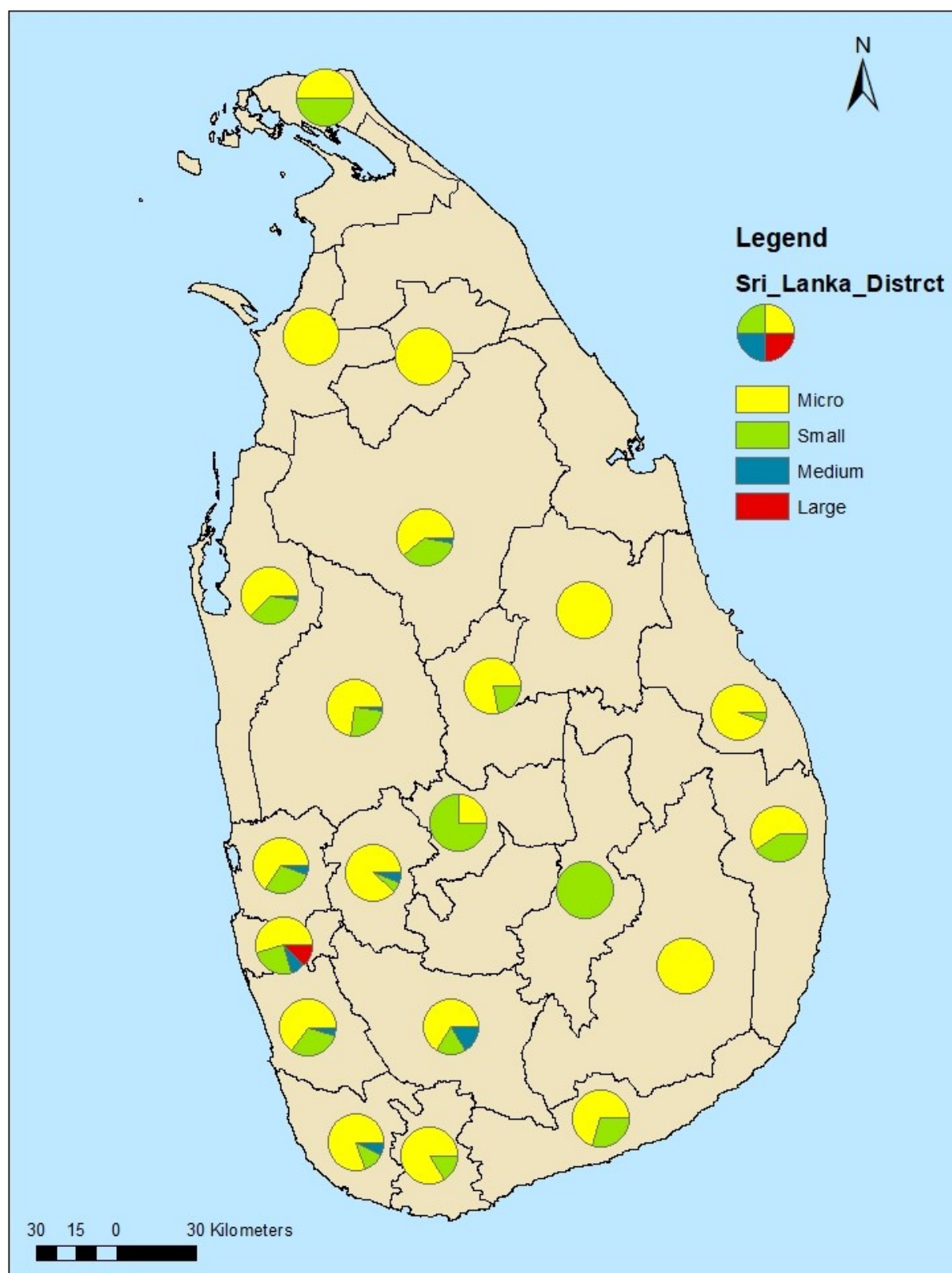
Source : Department of Census and Statistics

Table 2.1.15.8: 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 2.1.4: Major Manufacturing Establishments of Textile Sector by District in Sri Lanka

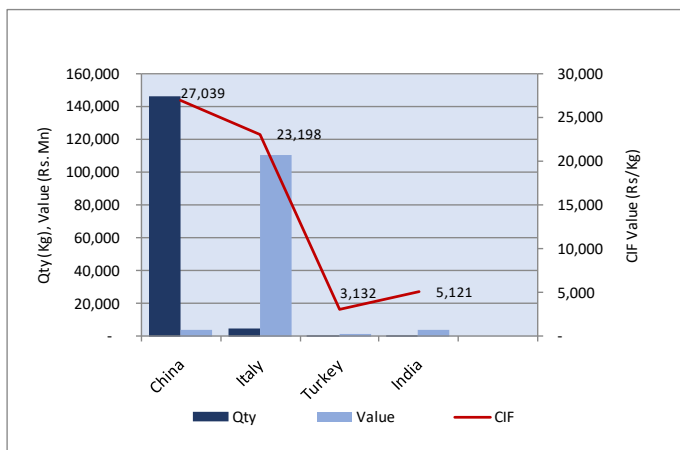


Source: Department of Census and Statistics

Table 2.1.16: Textile Imports (2019-2021)

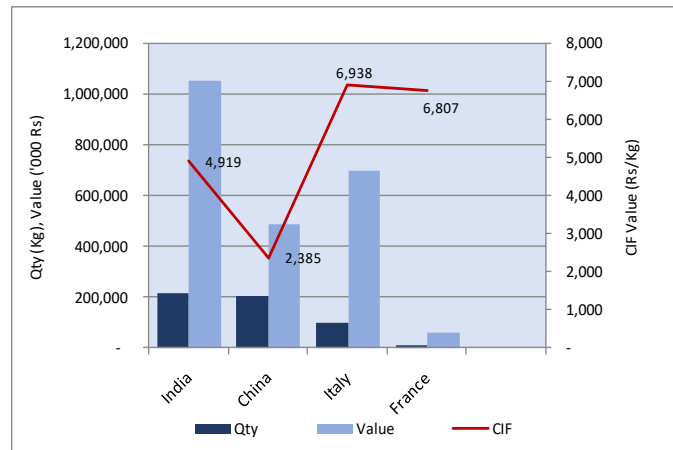
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Silk	MT	287	4,447	132	2,631	153	4,097
Wool, fine or coarse animal hair; horse-hair yarn and woven fabric	MT	495	1,424	484	1,661	569	2,553
Cotton	MT	103,687	117,290	84,440	93,800	103,963	127,733
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;lance;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



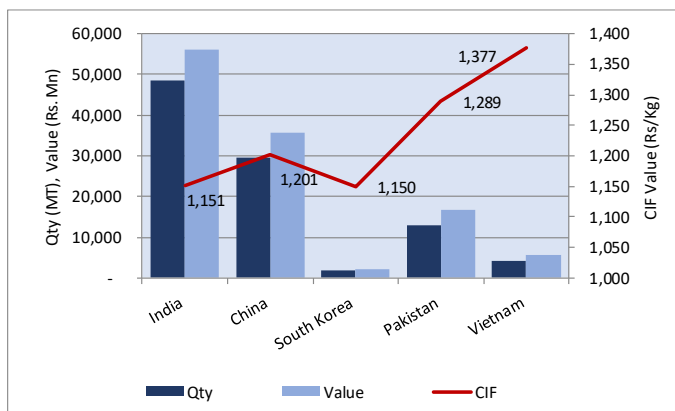
Source: Sri Lanka Customs

Figure 2.1.5: Major Import Countries of Silk-2021



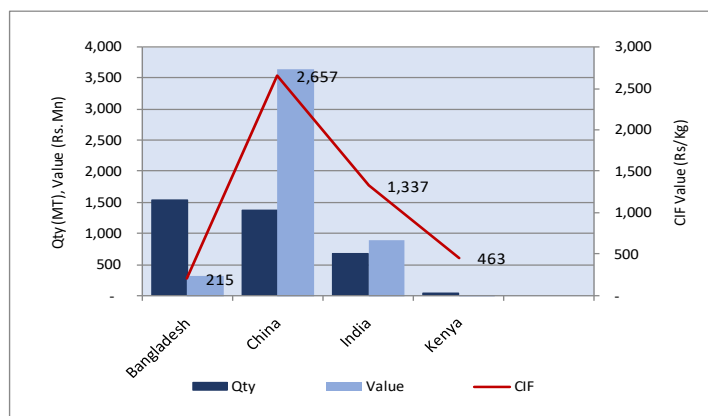
Source: Sri Lanka Customs

Figure 2.1.6: Major Import Countries of Wool, fine, or coarse animal hair; horse hair yarn and woven fabric - 2021



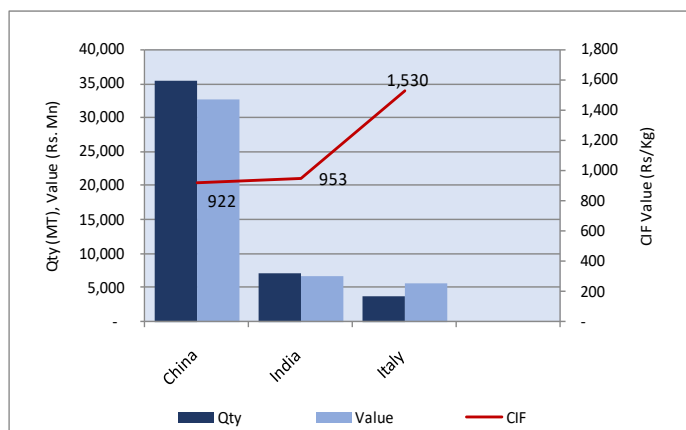
Source: Sri Lanka Customs

Figure 2.1.7: Major Import Countries of Cotton— 2021



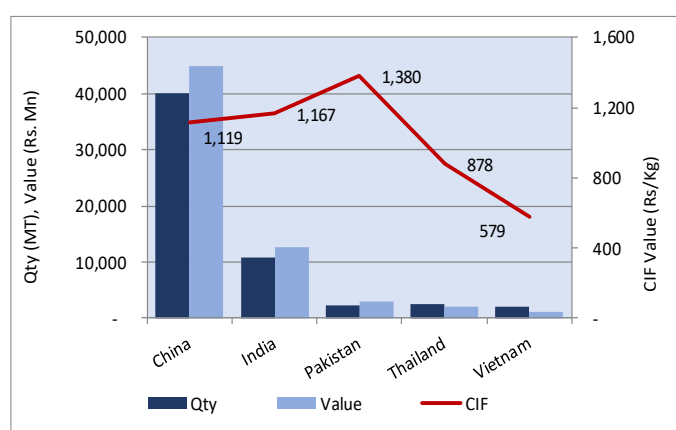
Source: Sri Lanka Customs

Figure 2.1.8: Major Import Countries of Other Vegetable Textile Fibers (paper yarn and woven fabrics of paper yarn) - 2021



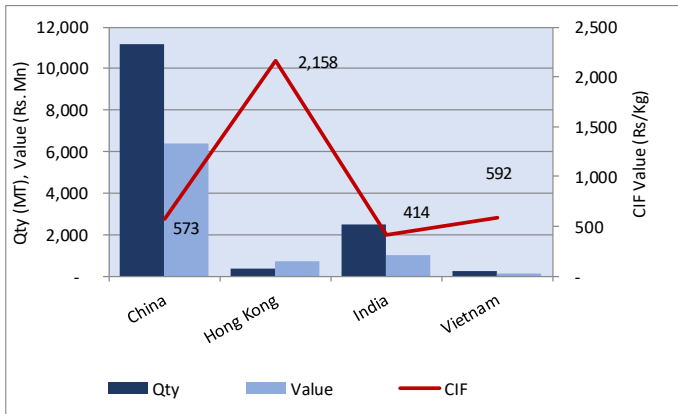
Source: Sri Lanka Customs

Figure 2.1.9: Major Import Countries of Man-made filaments (strip and the like of man-made textile materials) - 2021



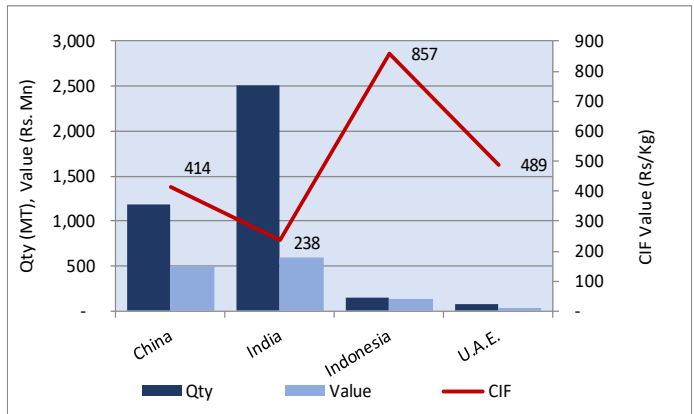
Source: Sri Lanka Customs

Figure 2.1.10: Major Import Countries of Man-made staple fibers - 2021



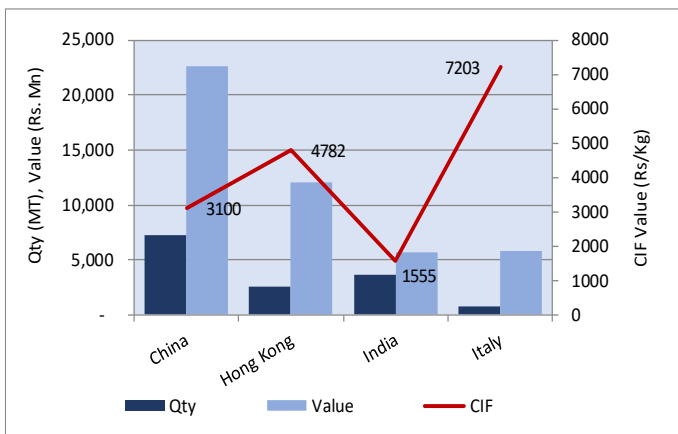
Source: Sri Lanka Customs

Figure 2.1.11: Major Import Countries of Wadding, felt & nonwovens special yarns (twine, cordage, ropes & cables & articles) - 2021



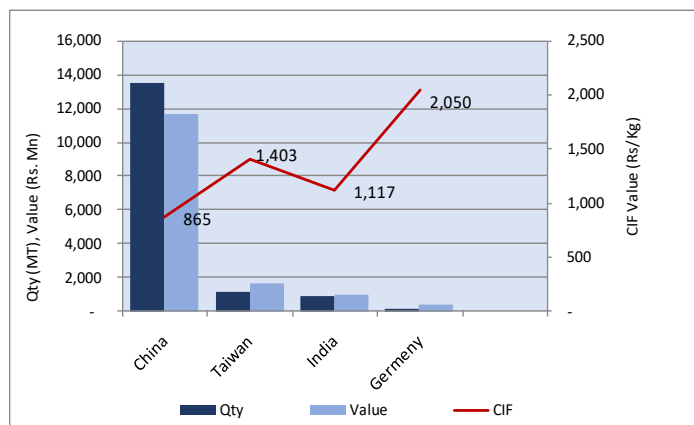
Source: Sri Lanka Customs

Figure 2.1.12: Major Import Countries of carpets & other textile floor coverings - 2021



Source: Sri Lanka Customs

Figure 2.1.13: Major Import Countries of Special woven fabrics (lace, tapestries, trimmings, embroidery) - 2021



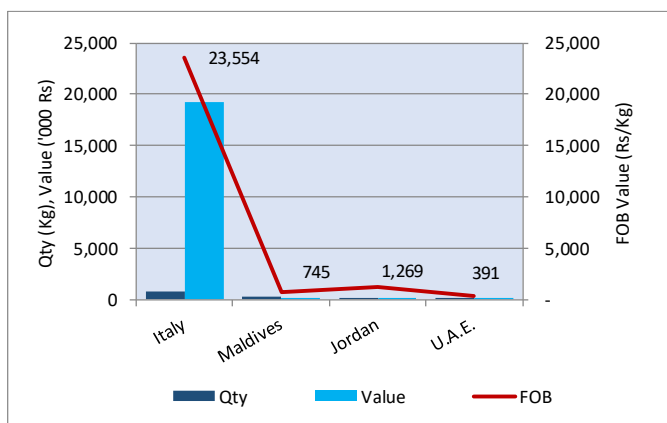
Source: Sri Lanka Customs

Figure 2.1.14: Major Import Countries of Textile articles of a kind suitable for industrial use - 2021

Table 2.1.17: Textile Exports (2019-2021)

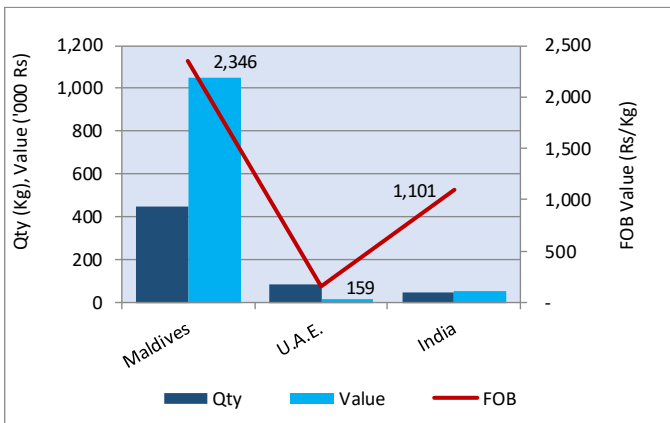
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Silk	MT	1	1	1	0.29	1	20
Wool, fine or coarse animal hair; horse-hair yarn and woven fabric	MT	1	0.39	0	1	1	1
Cotton	MT	3,248	2,471	1,915	1,897	2,992	5,317
Other vegetable textile fibers; paper 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



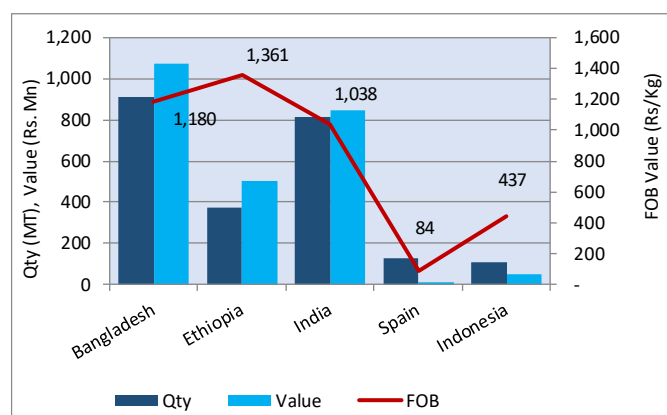
Source: Sri Lanka Customs

Figure 2.1.15: Major Export Countries of Silk - 2021



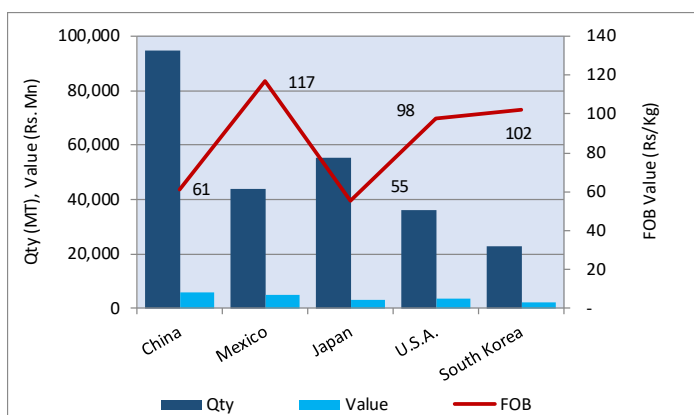
Source: Sri Lanka Customs

Figure 2.1.16: Major Export Countries of Wool, fine, or coarse animal hair; horse hair yarn and woven fabric - 2021



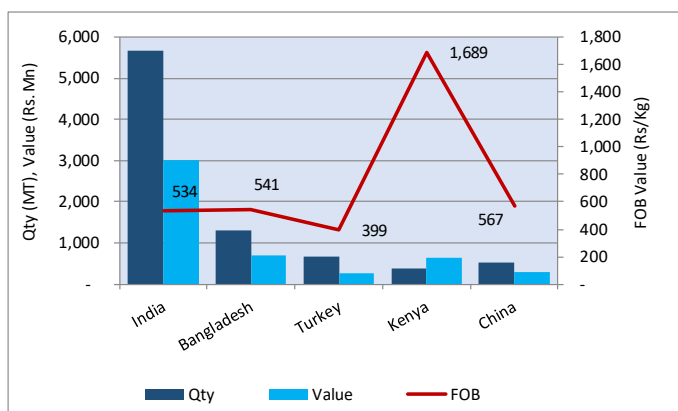
Source: Sri Lanka Customs

Figure 2.1.17: Major Export Countries of Cotton— 2021



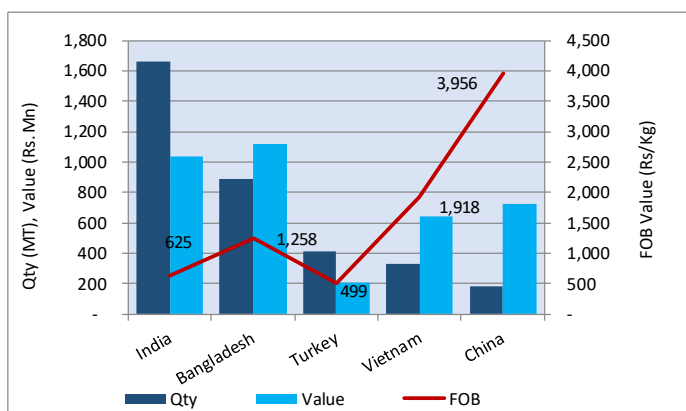
Source: Sri Lanka Customs

Figure 2.1.18: Major Export Countries of Other Vegetable Textile Fibers (paper yarn and woven fabrics of paper yarn) - 2021



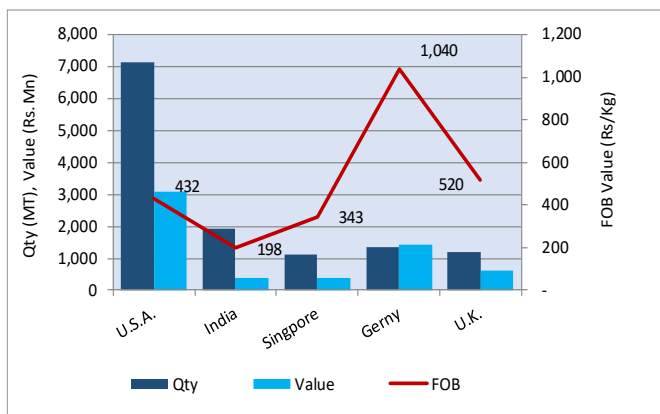
Source: Sri Lanka Customs

Figure 2.1.19: Major Export Countries of Man-made filaments (strip and the like of man-made textile materials - 2021



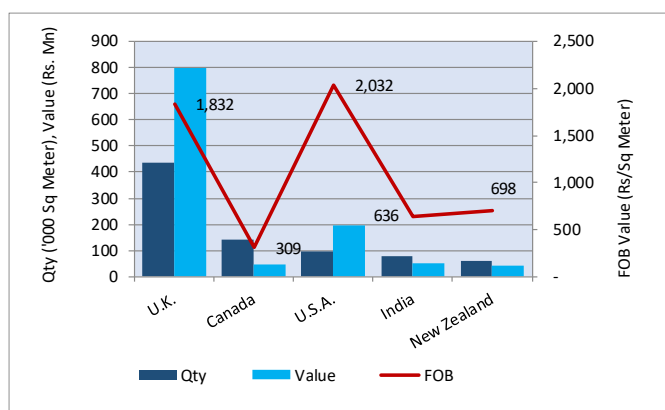
Source: Sri Lanka Customs

Figure 2.1.20: Major Export Countries of Man-made staple fibers - 2021



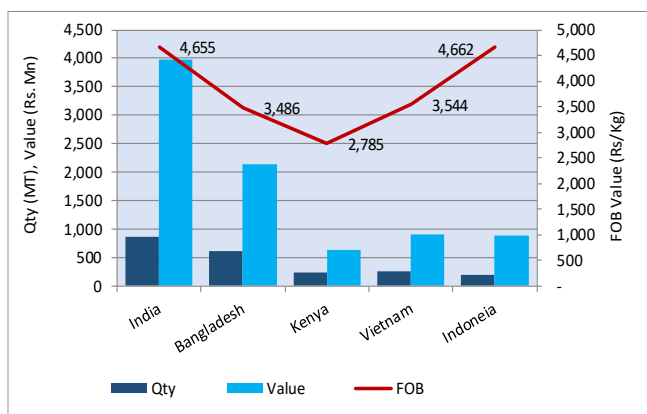
Source: Sri Lanka Customs

Figure 2.1.21: Major Export Countries of Wadding, felt & nonwovens special yarns (twine, cordage, ropes & cables & articles) - 2021



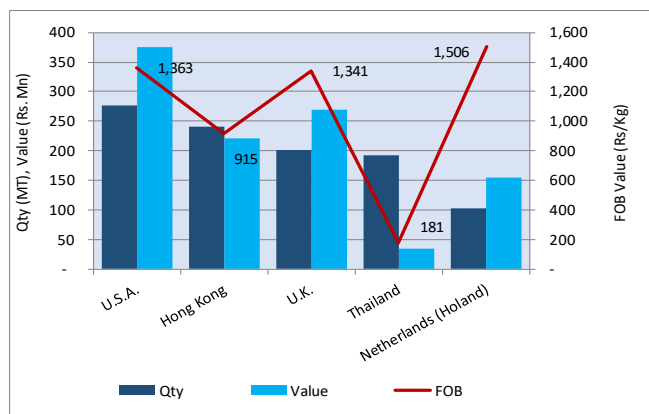
Source: Sri Lanka Customs

Figure 2.1.22: Major Export Countries of carpets & other textile floor coverings - 2021



Source: Sri Lanka Customs

Figure 2.1.23: Major Export Countries of Special woven fabrics (lace, tapestries, trimmings, embroidery) - 2021



Source: Sri Lanka Customs

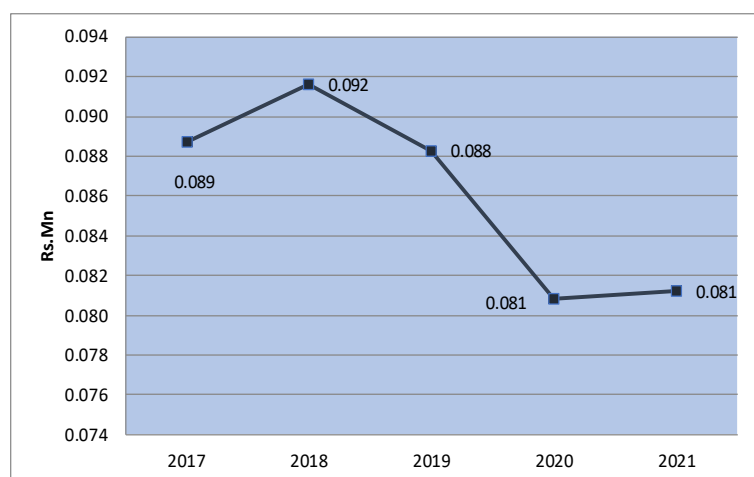
Figure 2.1.24: Major Import Countries of Textile articles of a kind suitable for industrial use - 2021

2.2. WEARING APPAREL INDUSTRY

Table 2.2.1: 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	11828.94	0.089	9405.82	0.100
2018	13092.19	0.092	8886.98	0.092
2019	13241.92	0.088	9018.69	0.091
2020	12143.04	0.081	7670.60	0.080
2021	13653.07	0.081	7491.44	0.076

Source : Department of Census and Statistics



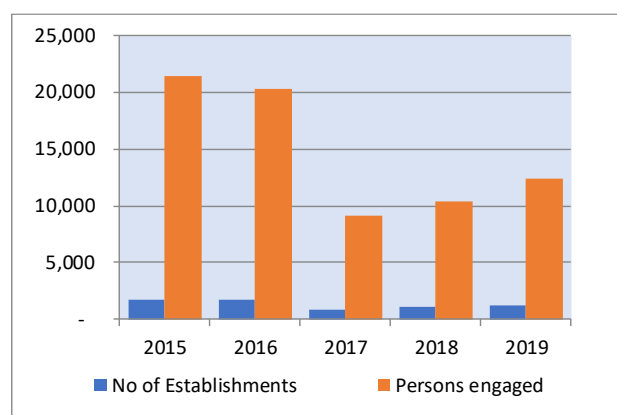
Source : Department of Census and Statistics

Figure 2.2.1: The Contribution of the Wearing Apparel Sector to the Share of the Manufacturing Industry to the GDP

Table 2.2.2: 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



Source : Department of Census and Statistics

Figure 2.2.2: The trend of establishments less than 25 persons engaged in Wearing Apparel industry

Table 2.2.3: 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								
Size	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 2.2.4: 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								
Size	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 2.2.5: 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								
Size	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 2.2.6: 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								
Size	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 2.2.7: 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)

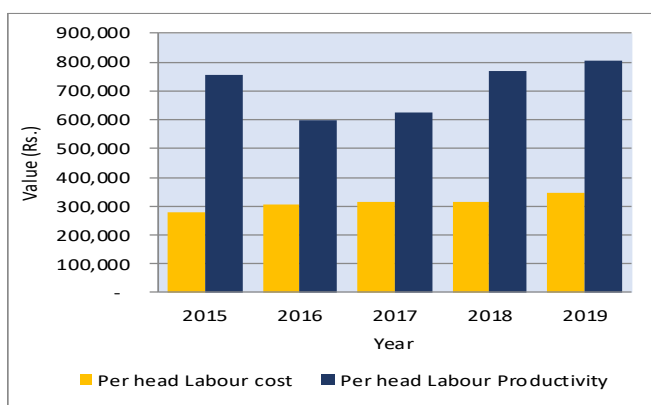
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	757	5,455	3,205	670,153,599	2,977,517,546	1,325,577,791	1,651,939,756	776,574
10 to 99	862	26,967	26,247	5,886,130,069	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 2.2.8: 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

Figure 2.2.3: Manufacturing of wearing Apparel Labour Productivity

Table 2.2.9: 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 2.2.10: 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 2.2.11: 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 2.2.12.1: 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 2.2.12.2: 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 2.2.12.3: Economic Indicators of Industrial Activity Classified by Industry Class Wearing 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	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 2.2.13: 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

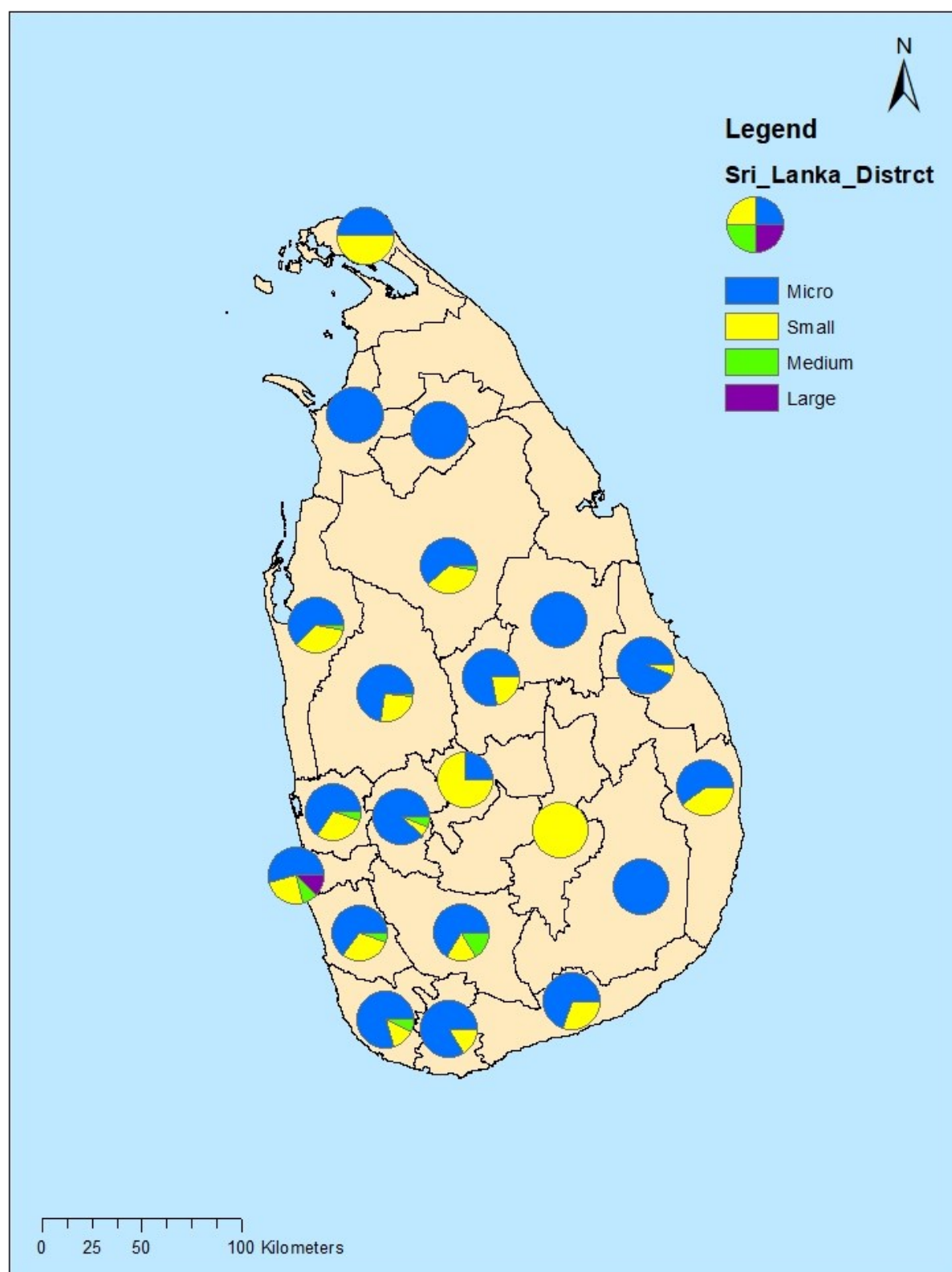
Source : Department of Census and Statistics , Annual Survey of Industries

Table 2.2.14: 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 2.2.4: Major Manufacturing Establishments of Wearing Apparel Sector by District in Sri Lanka

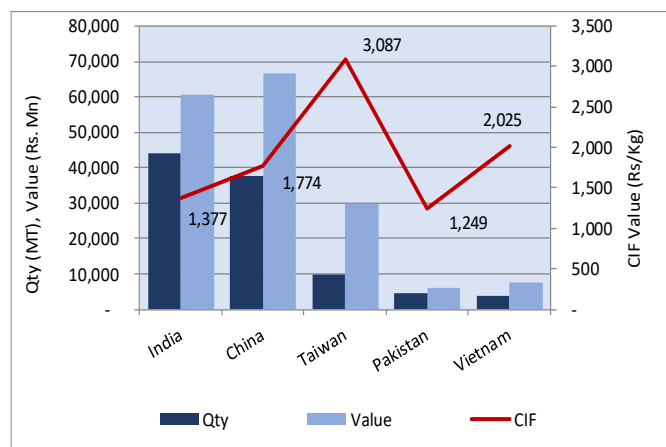


Source: Department of Census and Statistics

Table 2.2.15: Wearing Apparel Imports (2019-2021)

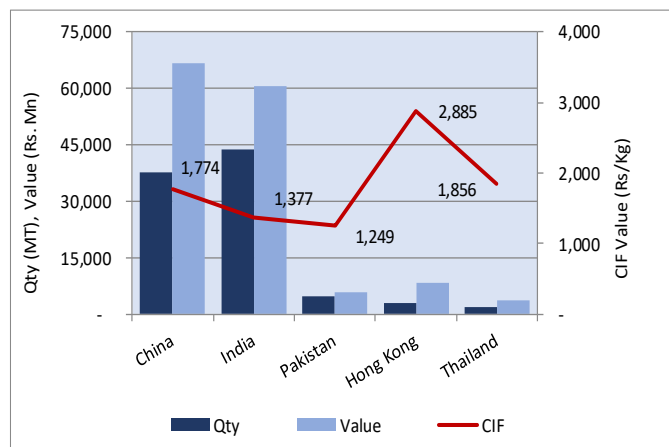
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Knitted or croched fabrics	MT	105,580	165,866	90,324	141,343	112,960	207,976
Articles of Apparel and clothing accessories, knitted or crocheted	('000) Number	8,402	5,230	8,094	4,725	11,100	7,692
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	9,415	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	164,420	125,341	234,702
Total	('000) Number	25,580	20,979	19,144	14,140	19,750	15,663
Grand Total			211,579		178,560		250,365

Source: Sri Lanka Customs



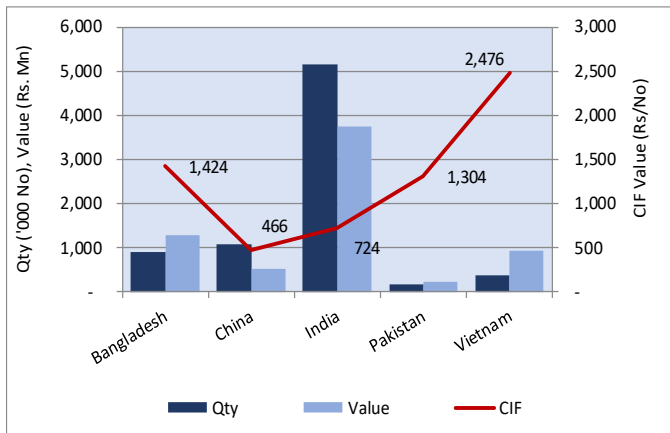
Source: Sri Lanka Customs

Figure 2.2.5: Major Import Countries of Knitted or crocheted fabrics - 2021

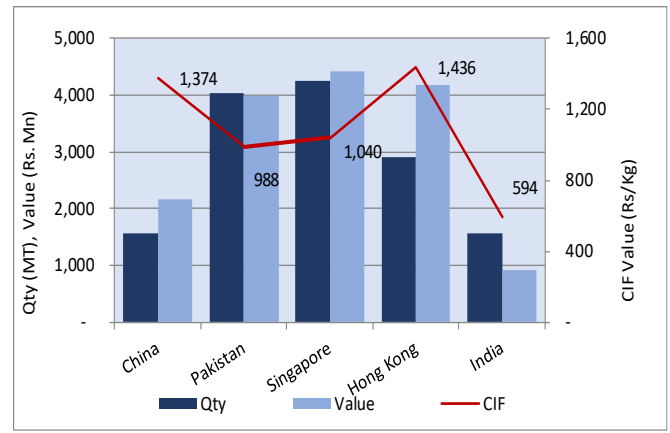


Source: Sri Lanka Customs

Figure 2.2.6: Major Import Countries of articles of apparel and clothing accessories, knitted or crocheted—2021



Source: Sri Lanka Customs



Source: Sri Lanka Customs

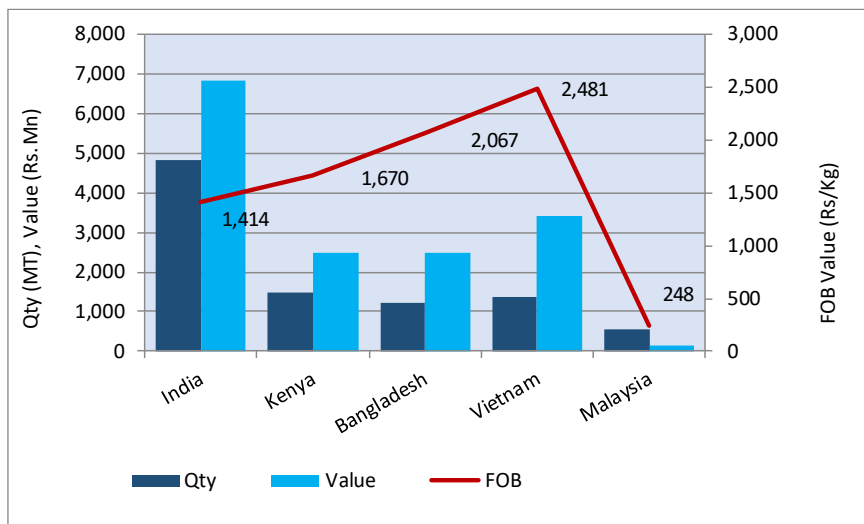
Figure 2.2.7: Major Import Countries of Articles of Apparel and Clothing accessories not knitted or Crocheted - 2021

Figure 2.2.8: Major Import Countries of Other made up articles; sets; worn clothing and worn textile articles; rags - 2021

Table 2.2.16: Wearing Apparel Exports (2019-2021)

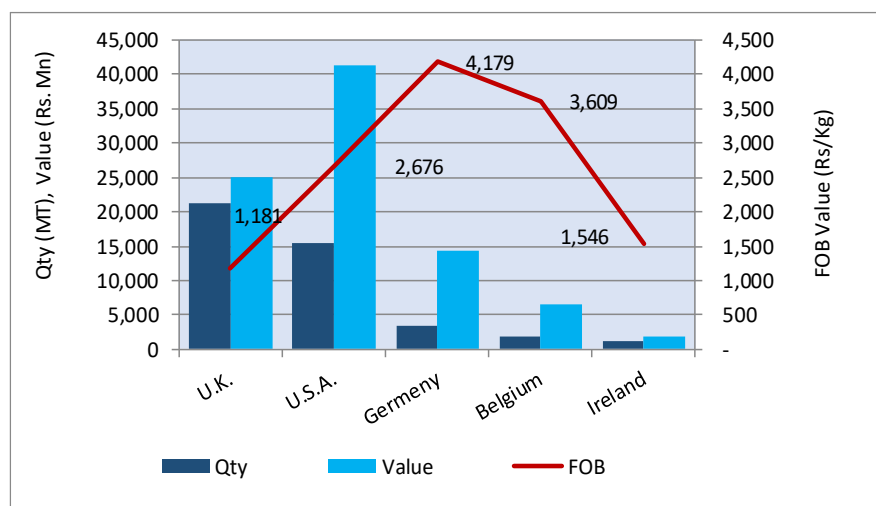
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Knitted or croched fabrics	MT	10,650	13,681	8,377	11,422	13,806	25,554
Articles of Apparel and clothing accessories, knitted or crocheted	('000) Number	856,344	439,402	637,655	342,538	851,335	475,435
Articles of Apparel and clothing accessories, knitted or crocheted	MT	17,381	106,957	15,444	71,441	54,665	135,859
Articles of Apparel and clothing accessories, not knitted or crocheted	('000) Number	293,094	264,481	123,345	175,507	155,920	220,836
Articles of Apparel and clothing accessories, not knitted or crocheted	MT	16,869	138,822	11,466	103,745	15,030	145,093
Other made up textile articles; sets; worn clothing and worn textile articles; rags	('000) Number	7	4	8	5	925	1
Other made up textile articles; sets; worn clothing and worn textile articles; rags	MT	18,593	18,052	20,647	40,336	23,599	23,832
Total	MT	63,492	277,511	55,932	226,943	107,100	330,338
Total	('000) Number	1,149,445	703,887	761,008	518,050	1,008,180	696,272
Grand Total			981,399		744,994		1,026,611

Source: Sri Lanka Customs



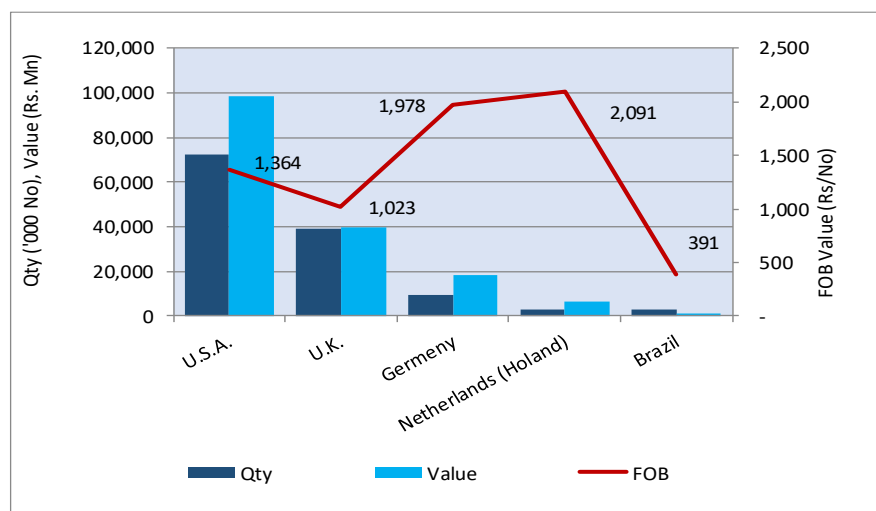
Source: Sri Lanka Customs

Figure 2.2.9: Major Export Countries of Knitted or crocheted fabrics - 2021



Source: Sri Lanka Customs

Figure 2.2.10: Major Export Countries of articles of apparel and clothing accessories, knitted or crocheted — 2021



Source: Sri Lanka Customs

Figure 2.2.11: Major Import Countries of Articles of Apparel and Clothing accessories not knitted or Crocheted - 2021



3. LEATHER, FOOTWEAR AND LEATHER PRODUCTS INDUSTRY

Overview

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

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

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

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

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

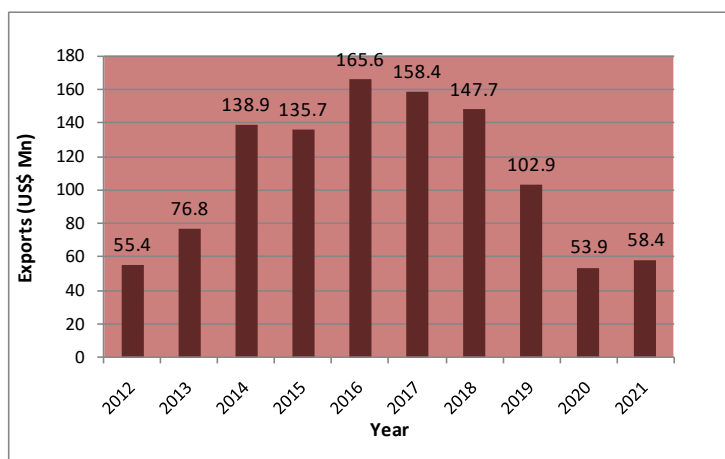
Sri Lanka does not allow tanning due to environment and cultural reasons. Therefore, the total need of tanned leather has to be imported to the country. In the year 2021 the total import of leather amounted to 2061 Mt at a cost of USD 4.7 million.

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

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

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

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



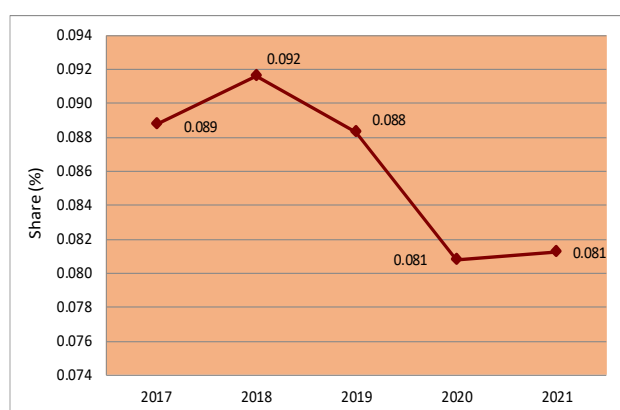
Source: Export Development Board

Figure 3.1: Export earnings of Leather and Footwear Industry

Table 3.1: Manufacture of Leather and Related Product Contributions to the GDP at Current and Constant Market Price (2017 - 2021)

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

Source : Department of Census and Statistics



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

Source : Department of Census and Statistics

Figure 3.2: The Contribution of the Leather and Related Products Sector to the Share of the Manufacturing Industry to the GDP

Table 3.2: Leather, Footwear and Leather Products Manufacturing Establishments (2015-2018)

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

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

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

Table 3.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2015) - (Establishments with 5 or more engaged)

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

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

Table 3.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2016) - (Establishments with 5 or more engaged)

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

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

Table 3.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2017) - (Establishments with 5 or more engaged)

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

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

Table 3.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2018) - (Establishments with 5 or more engaged)

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

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

Table 3.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Leather and Related Products Industry (2019) - (Establishments with 5 or more engaged)

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

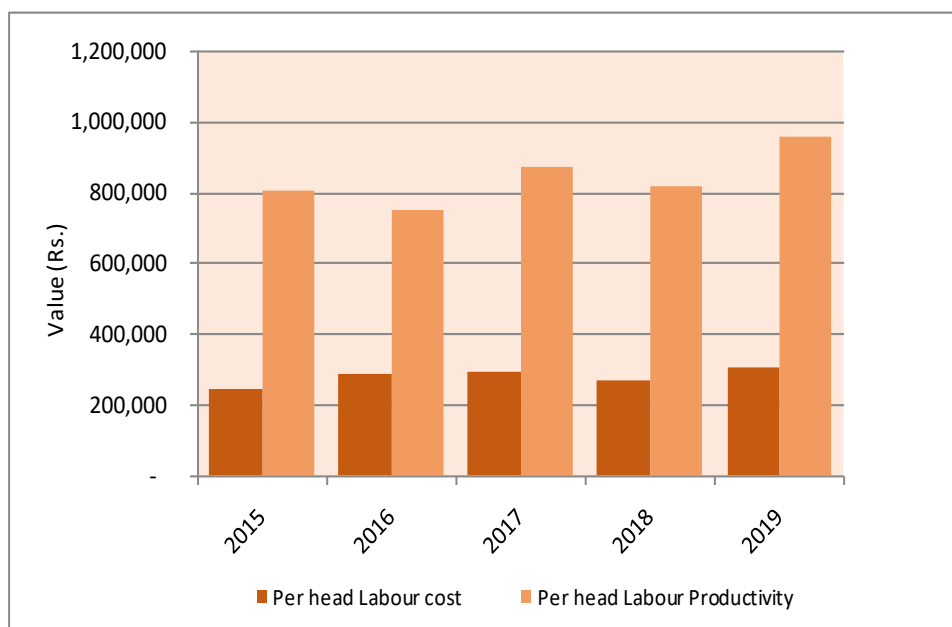
Source : Department of Census and Statistics , Annual Survey of Industries

Table 3.8: Manufacturing of Leather and Related Products Labour Productivity

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

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

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



Source : Department of Census and Statistics

Figure 3.3: Manufacturing of Leather and Foot wear Labour Productivity

Table 3.9: Value of Output & Output Components Classified by Leather and Related Products Industry - (Establishments 25 or more engaged)

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

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

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

Table 3.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Leather and Related Products Industry (Establishments with 25 or more persons engaged)

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

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

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

Table 3.11: Employment by nature of employment & gender classified by Industry division of Leather and Related Products Establishment with 25 or more persons engaged

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

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

Table 3.12: Economic Indicators of Industrial Activity Classified by Industry Class (Establishments with 25 or more engaged)

Table 3.12.1: Manufacture of Leather and related products

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

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

Table 3.12.2: Tanning and Dressing of Leather; manufacture of luggage, handbags, saddlery and harness; dressing and dyeing of fur

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

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

Table 3.12.3: Manufacture of Footwear

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

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

Table 3.13: Categories of Employees by Nature of Employment Classified by Industry of Leather and Related Products (Establishments with 25 or more persons engaged)

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

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

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

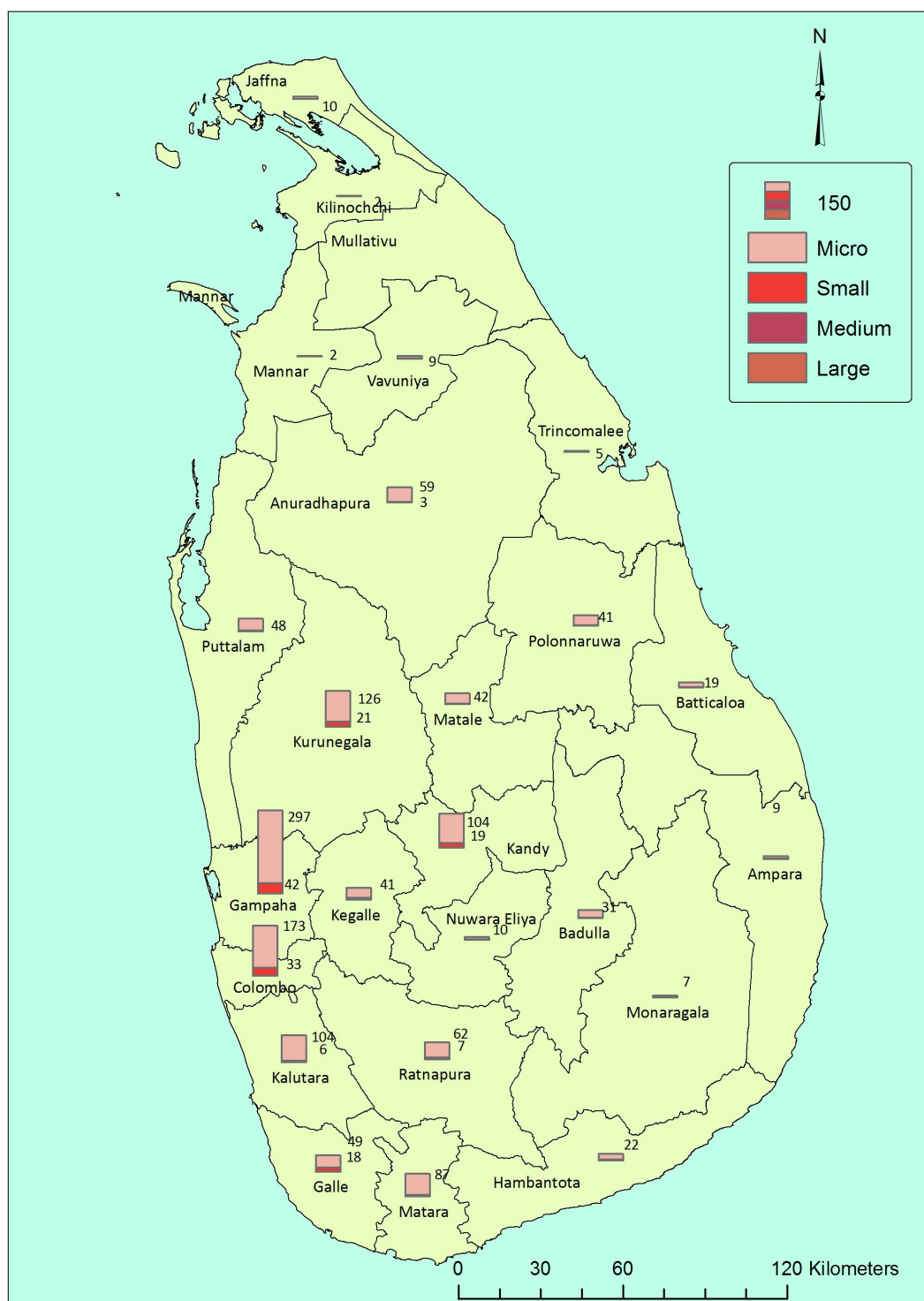
Table 3.14: Number of Leather and Related Products Manufacturing Industries and Engaged Persons in Sri Lanka (2013/14 Economic Census)

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

Source: Department of Census and Statistics

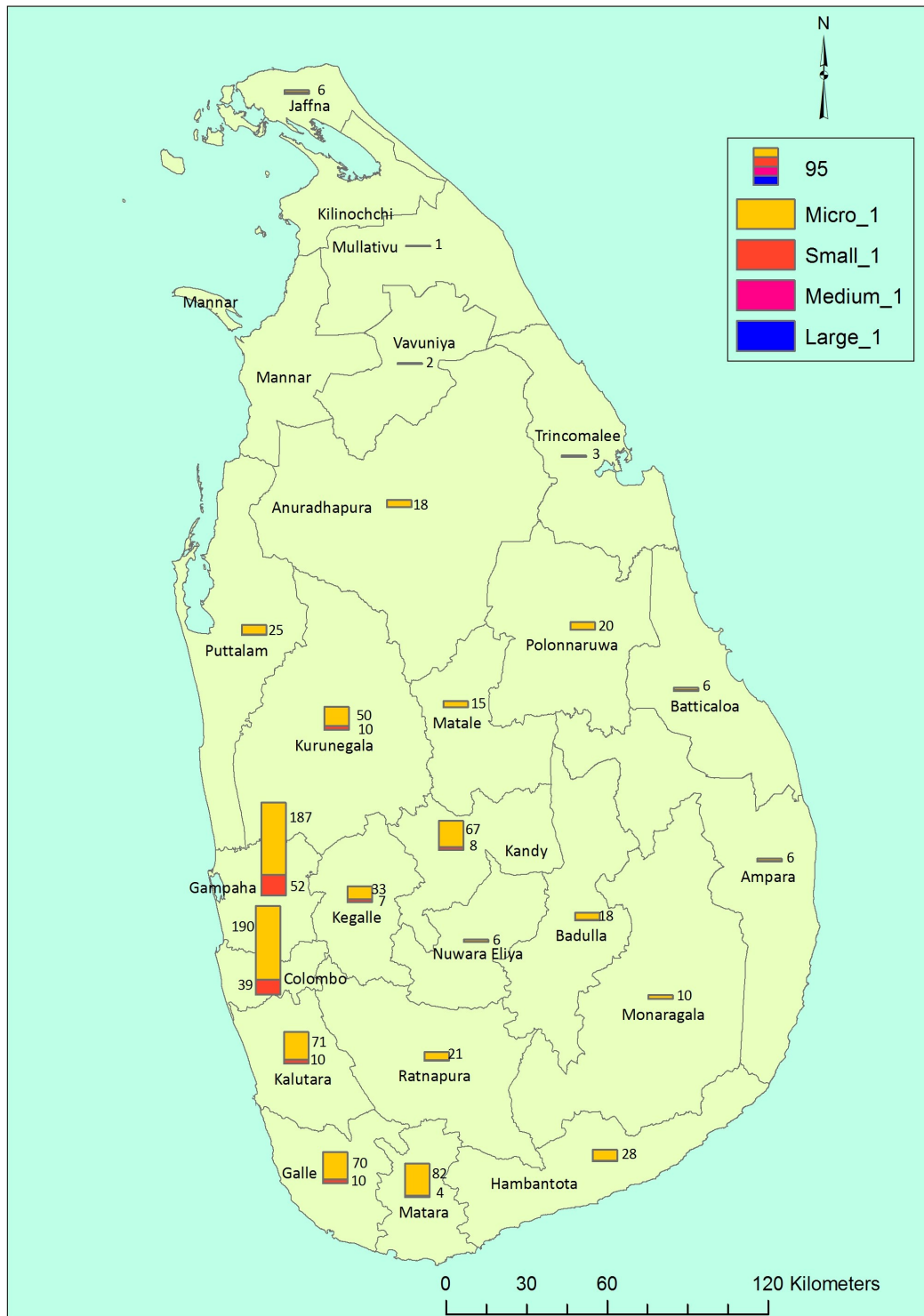
The diversification of product mix manufactured by the micro and small enterprises for emerging new markets is remarkable whilst medium and large enterprises are limiting their manufacturing only for few products demanded in existed large markets. The micro and small enterprises always acts as a market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

Figure 3.4: Major Manufacturing Establishments of Bags, School bags, Purse & Suitcases of any material by District in Sri Lanka



Source: Department of Census and Statistics

Figure 3.5: Major Manufacturing Establishments of Leather Footwear by District in Sri Lanka

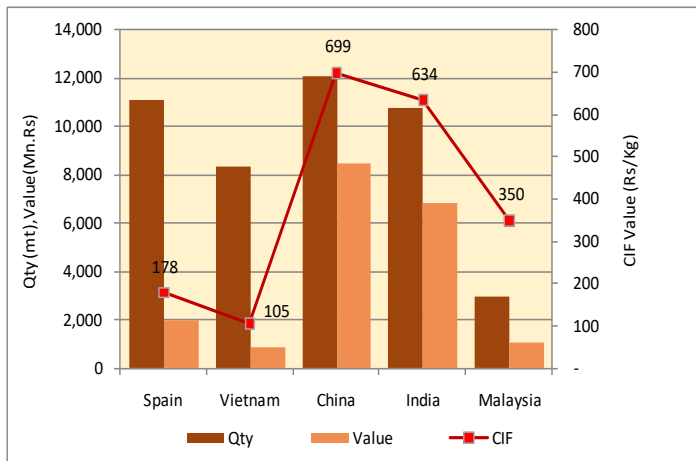


Source: Department of Census and Statistics

Table 3.15: Leather, Footwear, and Leather products Imports (2019-2021)

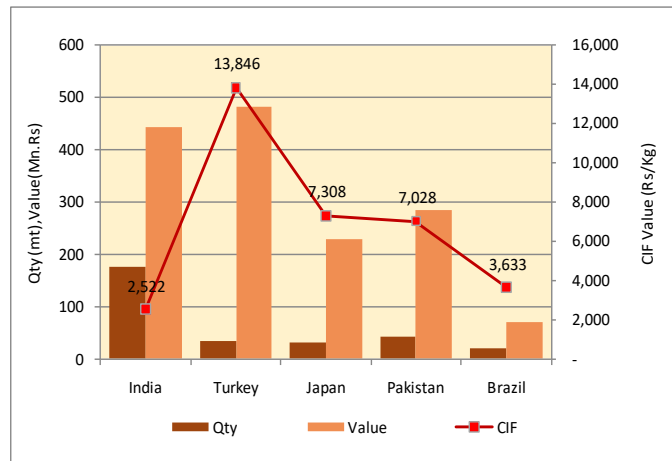
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Tanning or dying extracts; tannins and their derivatives; dyes, pigments and other coloring matter; paints & varnishes; putty & other mastics; inks	MT	50,070	27,644	47,732	25,776	61,551	36,106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

Source: Sri Lanka Customs



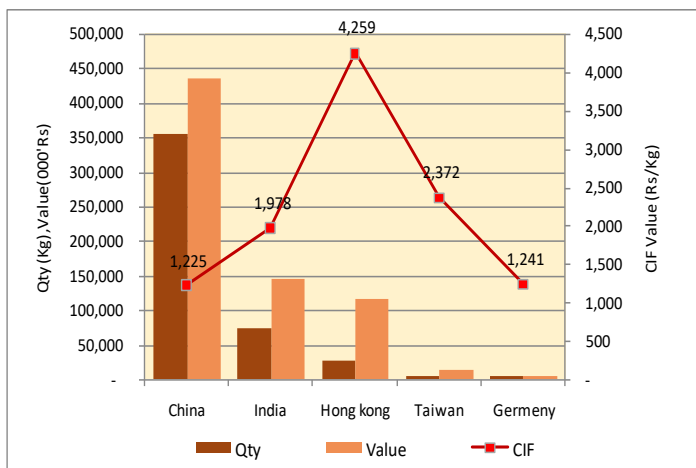
Source: Sri Lanka Customs

Figure 3.6: Major Import Countries of Tanning or dyeing extracts; tannins and their derivatives - 2021



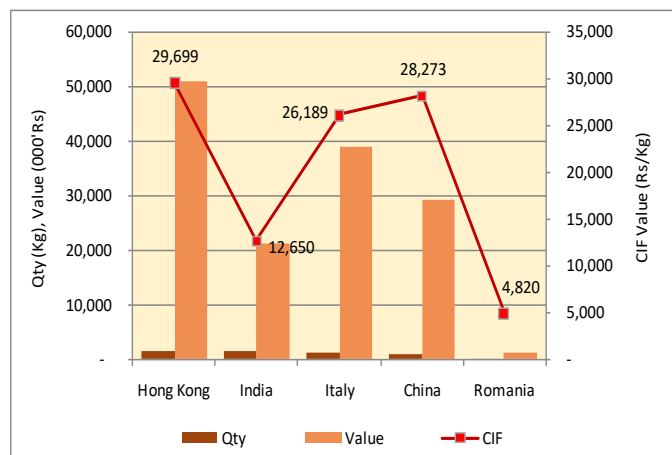
Source: Sri Lanka Customs

Figure 3.7: Major Import Countries of Raw hides and skins - 2021



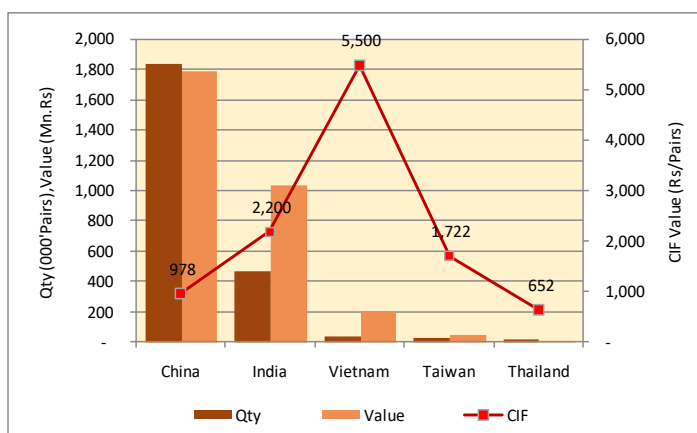
Source: Sri Lanka Customs

Figure 3.8: Major Import Countries of Articles of Leather, Saddlery & Harness - 2021



Source: Sri Lanka Customs

Figure 3.9: Major Import Countries of Fur skins & artificial - 2021



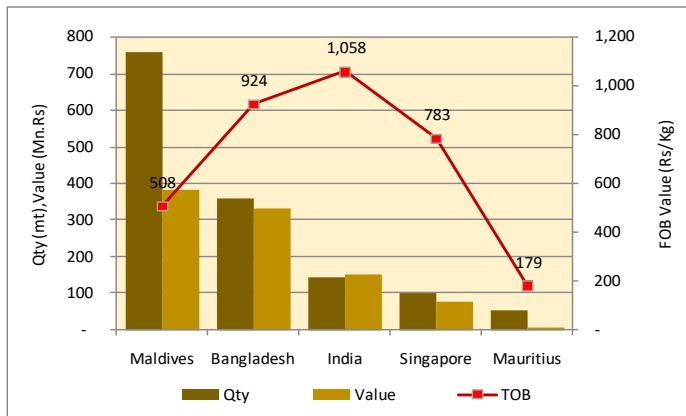
Source: Sri Lanka Customs

Figure 3.10: Major Import Countries of Footwear, Gaiters and the like; parts of such articles - 2021

Table 3.16: Leather, Footwear, and Leather Products Exports (2019-2021)

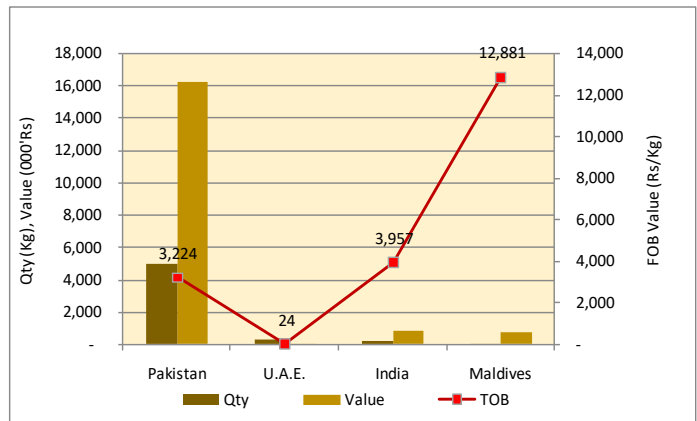
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Tanning or dying extracts; tannins and their derivatives; dyes, pigments and other coloring matter; paints & varnishes; putty & other mastics; inks	MT	2,654	1,350	1,709	848	2,061	1,630
Raw hides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

Source: Sri Lanka Customs



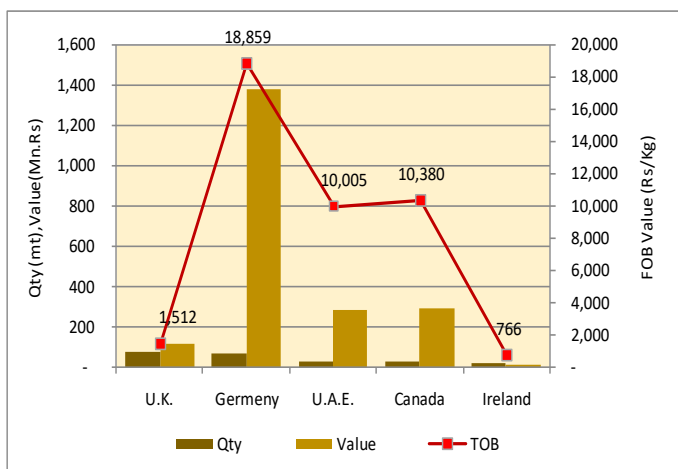
Source: Sri Lanka Customs

Figure 3.11: Major Export Countries of Tanning or Dyeing Extracts - 2021



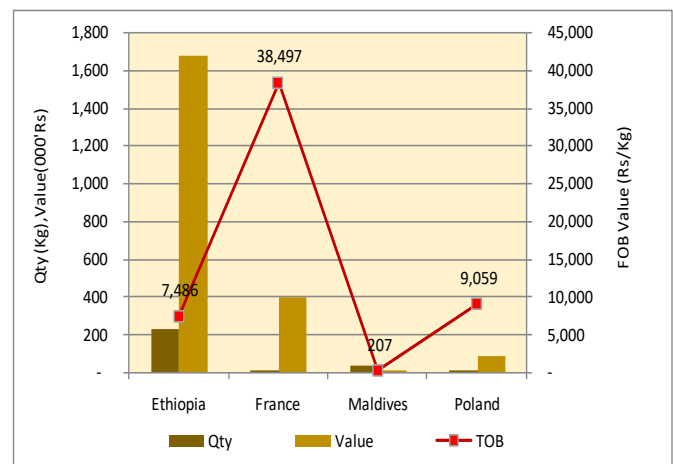
Source: Sri Lanka Customs

Figure 3.12: Major Exports Countries of Raw hides and Skins and Leather - 2021



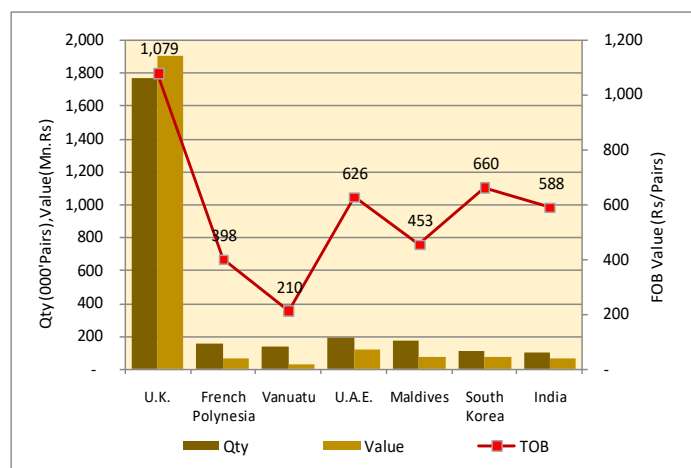
Source: Sri Lanka Customs

Figure 3.13: Major Exports Countries of Articles of Leather, Saddler & Harness - 2021



Source: Sri Lanka Customs

Figure 3.14: Major Exports Countries of Fur Skins & artificial fur Manufacturers thereof - 2021



Source: Sri Lanka Customs

Figure 3.15: Major Exports Countries of Footwear, gaiters and the part of such articles - 2021

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



4. WOOD, WOOD BASED PRODUCTS AND FURNITURE INDUSTRY

4.1. WOOD, WOOD BASED PRODUCTS INDUSTRY

Overview

The wood and wood based products sector consist of the subsectors of Timber processing, Wood based board-manufacturing, MDF, Melamine faced MDF, melamine faced chipboard, finger jointed board and plywood manufacturing, Job specific engineered wooden plank manufacturing, Solid wood furniture & other items manufacturing , Wood based board furniture & other items manufacturing, Total Interior fit outs and interior solution, Reed and Cane items manufacturing using bamboo and Bamboo furniture and other items manufactured using Bamboo. The furniture sector mainly manufactures Household furniture, Bed room & living room, Kitchen furniture, Garden furniture, Office Furniture, Computer Tables, Office Tables, Commercial and institutional furniture, Hotel Furniture, School Furniture and Hospital Furniture.

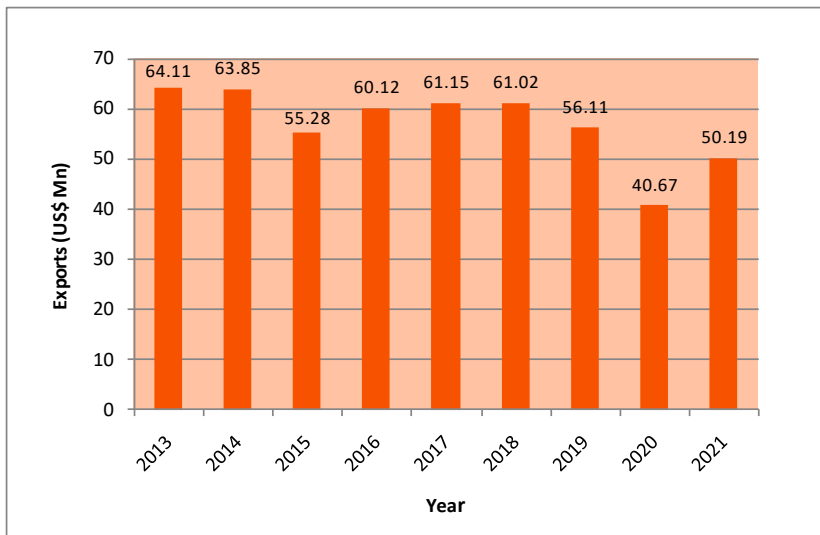
Core activities of the wood and wood based products sector includes making of furniture, carpentry and joinery, interior fit-outs, industrial wooden/ wood based components, toys, early childhood development equipment, ornamental items, decorative items.

The sector depends mainly on the local wood supply for raw materials. The sector is diverse, consisting of a variety of industries including saw milling, furniture, construction, parquet flooring, wood-based panel products, carvings, wooden toys and industrial wooden components such as brush handles.

Sri Lankan wooden exports include Broom handles and Brush Blocks, Parquet for flooring, Hardwood plywood, Household utility items, Wooden toys, Carvings and ornaments, Household furniture, Office furniture, Furniture in ready-to-assemble form, Table lamps, Skipping rope handles, Rulers and Handicraft

Total export earnings from the wood and wood based products sector amounts to USD 50.19 million by the end of 2021. The Sector Contributed 0.41% to the total merchandise exports in year 2021. This is while receiving USD 28.86 million from India, the largest buyer of the Sri Lankan Wood and wood based products .USA, Maldives, Netherlands, UK, China, Oman, Australia, UAE and Pakistan are other major export destinations available for the sector products. Wood and wood based products sector contribution to GDP stands approximately at 0.16%. While the furniture sector contribution to GDP stands at 0.42%.

The wood and wood based products sector provides direct and indirect employment for about 500,000 people. There are about 7,800 Registered wood working outlets available in the country. Approximately, 3,500 number of selling outlets are promoting the wood based products island wide.



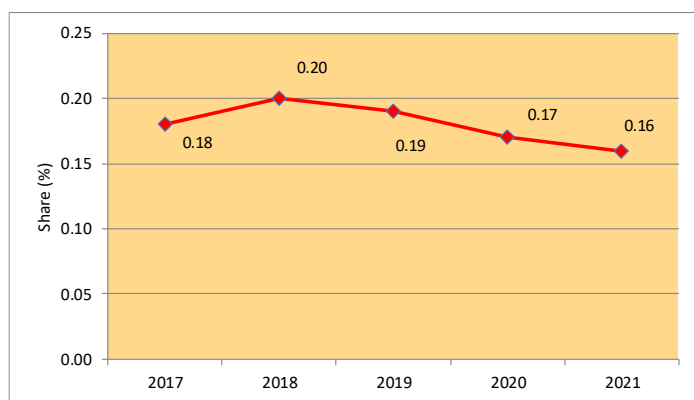
Source; Export Development Board

Figure 4.1.1: Exports Value of wooden products Industry

Table 4.1.1: Manufacture of Wood and Wood Based Product Contributions to the GDP at Current and Constant Market Price (2017 - 2021)

Year	Current		Constant	
	Contribution Value (Rs. Mn)	Share (%)	Contribution Value (Rs. Mn)	Share (%)
2017	23,743	0.18	32,909	0.35
2018	28,381	0.20	34,233	0.35
2019	27,754	0.19	31,408	0.32
2020	25,794	0.17	28,725	0.30
2021	26,280	0.16	31,129	0.32

Source : Department of Census and Statistics



The Contribution of the wood and wood based products sector to the GDP at current market price recorded approximately 0.18% in 2017 and then peaked at 0.2% in 2018 before falling to about 0.16% in 2021.

Source : Department of Census and Statistics

Figure 4.1.2: The Contribution of the Wood and Wood Based Products sector to the share of the manufacturing industry to the GDP at Current Market Price

Table 4.1.2: Manufacturing Establishments and Number of Persons Engaged of Wood and Wood Based Products 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	919	7,670	171	34,234
2016	1,047	10,847	266	14,997
2017	957	8,373	238	12,655
2018	1,066	7,744	240	9,553
2019	962	6,900	126	8,537

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

Table 4.1.3: Principal Indicators of Industrial Activity classified by Industry Division & Persons Engaged Size Class of Wood and Wood Based Products Industry (2015) - (Establishments with 5 or more engaged)

2015								
Size	No of establishments	Persons engaged	Employ-ees	Salary & Wages	Out put (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	708	4,435	3,549	1,112,568,553	5,342,917,046	2,661,048,989	2,681,868,057	1,592,792,120
10 to 99	276	7,082	6,781	1,546,184,788	7,572,752,072	3,642,624,248	3,930,127,823	309,348,254
100 & above	105	30,386	30,185	3,410,632,274	12,187,167,007	9,804,590,510	2,382,576,497	571,761,868
Group total	1,089	41,903	40,515	6,069,385,615	25,102,836,125	16,108,263,747	8,994,572,377	2,473,902,242

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

Table 4.1.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Wood and Wood Based Products Industry (2016) - (Establishments with 5 or more engaged)

2016								
Size	No of establishments	Persons engaged	Employ-ees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	479	3,302	1,918	470,456,654	1,586,033,631	945,054,075	641,879,556	7,997,800
10 to 99	794	15,945	13,199	3,157,545,862	9,919,488,701	6,352,085,146	3,567,403,556	522,035,091
100 & above	40	6,598	6,357	1,962,306,941	15,191,550,198	10,220,266,052	4,971,284,147	727,113,091
Group total	1,313	25,845	21,474	5,590,309,457	26,697,072,530	17,517,405,273	9,180,567,259	1,257,145,982

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

Table 4.1.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Wood and Wood Based Products Industry (2017) - (Establishments with 5 or more engaged)

2017								
Size	No of establishments	Persons engaged	Employ-ees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	669	3,923	2,533	576,989,124	2,343,225,382	1,139,464,400	1,203,760,983	19,231,927
10 to 99	488	11,245	10,326	2,116,081,181	7,779,661,370	4,111,998,490	3,667,662,880	631,438,767
100 & above	38	5,860	5,652	1,754,162,402	15,132,990,199	11,366,578,729	3,766,411,470	247,344,614
Group total	1,195	21,028	18,511	4,447,232,707	25,255,876,951	16,618,041,619	8,637,835,333	898,015,308

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

Table 4.1.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Wood and Wood Based Products Industry (2018) - (Establishments with 5 or more engaged)

2018								
Size	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	839	4,619	3,094	859,343,130	6,835,387,097	4,127,588,327	2,707,798,769	15,804,773
10 to 99	453	10,175	9,114	2,354,850,065	8,186,193,782	4,679,508,498	3,506,685,284	174,513,924
100 & above	13	2,503	2,473	994,265,578	9,783,662,612	7,496,129,989	2,287,532,623	167,870,491
Group total	1,305	17,297	14,681	4,208,458,773	24,805,243,491	16,303,226,814	8,502,016,676	358,189,188

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

Table 4.1.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Wood and Wood Based Products Industry (2019) - (Establishments with 5 or more engaged)

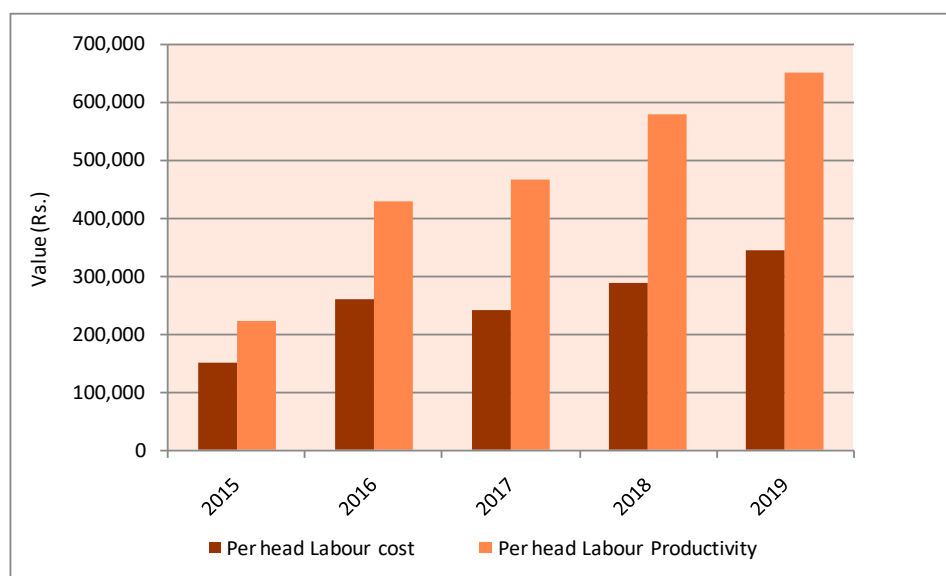
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	840	5,185	3,544	1,345,309,592	12,334,262,202	8,016,116,597	4,318,145,606	3,296,341,343
10 to 99	223	5,577	5,328	1,609,937,964	5,799,821,518	3,847,089,043	1,952,732,475	146,781,495
100 & above	26	4,676	4,618	1,664,621,902	7,545,998,741	5,063,786,932	2,482,211,809	224,352,325
Group total	1,089	15,438	13,490	4,619,869,458	25,680,082,461	16,926,992,572	8,753,089,890	3,667,475,163

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

Table 4.1.8: Manufacturing of Wood and Wood Based Industry Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	149,806	222,006	148.20
2016	260,329	427,520	164.22
2017	240,248	466,633	194.23
2018	286,660	579,117	202.02
2019	342,466	648,858	189.47

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



Source : Department of Census and Statistics

Figure 4.1.3: Manufacturing of Wood and Wood Based Industry Per Head Labour Productivity

Table 4.1.9: Value of Output & Output Components Classified by Wood and Wood Based 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	15,656,839,578	6,274,827,552	1,615,784,636	7,766,227,390
2016	21,915,247,087	14,425,470,231	77,841,415	7,411,935,441
2017	20,826,483,758	13,266,450,559	(157,301,817)	7,717,355,016
2018	15,593,049,727	10,359,395,469	(16,727,403)	5,250,381,660
2019	11,265,563,523	11,252,802,313	(94,900,476)	107,661,686

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

Table 4.1.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Wood and Wood Based 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	11,479,379,962	3,610,701,604	7,049,310,440	819,367,918
2016	14,975,821,073	7,382,911,259	6,453,256,664	1,139,653,149
2017	14,772,669,101	6,258,842,785	6,502,003,201	2,011,823,116
2018	10,833,755,516	4,798,354,850	4,830,880,339	1,204,520,328
2019	7,448,021,076	6,514,771,116	485,056,341	448,193,619

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

Table 4.1.11: Employment by Nature of Employment & Gender Classified by Industry Division of Wood and Wood Based Products Industry - (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	55	36	200	9	29,049	1,639	2,997	249	32,301	1,933
2016	396	110	285	271	8,593	2,795	1,762	786	11,035	3,962
2017	199	44	60	56	7,709	2,923	1,281	384	9,248	3,407
2018	200	153	226	236	5,570	1,977	862	315	6,872	2,681
2019	63	67	48	27	4,693	2,331	734	575	5,538	2,999

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

Table 4.1.12: Categories of Employees by Nature of Employment Classified by Wood Based Products Industry (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	28,582	15,954	11,231
2016	13,939	7,803	3,585
2017	12,296	7,517	3,115
2018	8,737	4,976	2,572
2019	8,333	5,514	1,510

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

Table 4.1.13: Economic Indicators of Industrial Activity Classified by Industry Class of Wood and Wood Based Products 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	1,231,550	2.041	1.560	628,046	1.041	0.795
2016	440,933	1.882	0.788	206,617	0.882	0.369
2017	529,026	2.400	1.057	308,624	1.400	0.617
2018	1,189,591	1.684	1.030	483,306	0.684	0.418
2019	2,088,940	1.521	0.900	715,255	0.521	0.308

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

**Table 4.1.14.1: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments with 25 or more persons engaged)**

Saw-Milling and Planning of Wood

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	111,632	9.782	4.359	100,220	8.782	3.914
2016	872,631	1.392	0.630	245,744	0.392	0.177
2017	477,009	1.560	0.295	1,616,108	0.560	0.106
2018	647,492	1.763	0.620	280,187	0.763	0.268
2019	835,559	1.544	0.429	294,329	0.544	0.151

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

**Table 4.1.14.2: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments with 25 or more persons engaged)**

Manufacture of Products of Wood, Cork, Straw and Plaiting Materials

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	7,345,207	0.989	0.754	(80,259)	(0.011)	(0.008)
2016	1,773,811	1.483	0.908	577,906	0.483	0.296
2017	2,156,789	1.397	0.818	2,637,636	0.397	0.232
2018	2,061,950	1.404	1.025	593,323	0.404	0.295
2019	1,438,581	1.508	1.408	484,739	0.508	0.475

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

Table 4.1.15: Number Wood and Wood Based Products Manufacturing Industries and Engaged Persons in Sri Lanka

(2013/14 Economic Census)

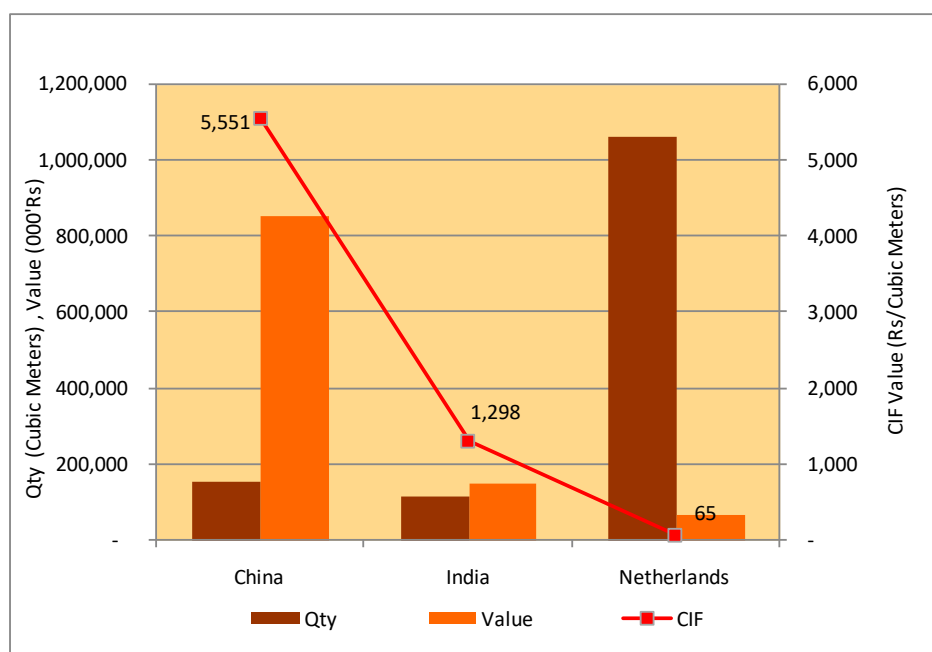
Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of veneer sheets, laminated wood boards & fibre boards	14	25	4	24	3	166	-	-
Manufacture of wood based panels	16	32	2	11	-	-	-	-
Manufacture of plywood	16	29	6	60	10	705	1	250
Manufacture beams, rafters ,roof struts & wood based roof trusses	304	574	19	108	-	-	-	-
Manufacture of doors, windows, shutters and their frames, parquet floor blocks etc.	10,383	14,947	213	1,340	5	204	-	-
Manufacture of wooden stairs, railings	41	72	4	22	-	-	-	-
Manufacture of wooden beadings and moldings	30	51	1	5	-	-	-	-
Manufacture of other builder's carpentry and joinery n.e.c.	1,799	2,595	44	289	1	25	-	-
Manufacture of wooden containers, packing cases of wood	141	236	14	123	3	177	-	-
Manufacture of wooden products such as wooden drums, barrels, pallets	73	153	-	-	-	-	-	-
Manufacture of wooden cable drums	9	10	1	6	-	-	-	-
Manufacture of other wooden containers n.e.c.	49	79	7	57	-	-	-	-
Manufacture of wooden household utensils, kitchenware, clothes hangers	1,038	1,589	47	325	5	206	-	-
Manufacture of wooden statuettes, ornaments	523	763	23	192	4	192	-	-
Manufacture of cork products and Cork processing	5	6	2	11			-	-
Wooden mirror and picture frames	666	865	15	113	1	30	-	-
Wooden boots, shoe parts; handles for brushes and tools etc.	71	124	15	157	4	185	-	-
Manufacture of other products of wood, manufacture of articles straw and plaiting materials n.e.c.	1,205	1,749	51	392	9	525	-	-
Total	16,383	23,899	468	3,235	45	2,415	1	250

Source: Department of Census and Statistics

Table 4.1.16: Wood and Wood Based Products Imports (2019-2021)

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs)	Quantity	Value (Rs)	Quantity	Value (Rs)
Plywood, veneered panels and similar laminated wood.	MT	1,386	139	1,048	110	330	56
Plywood, veneered panels and similar laminated wood.	('000) Cubic Meters	191	1,186	119	754	1,378	1,155
Total	MT	1,386	139	1,048	110	330	56
Total	('000) Cubic Meters	191	1,186	119	754	1,378	1,155
Grand Total			1,325		864		1,211

Source: Sri Lanka Customs



Source : Sri Lanka Customs

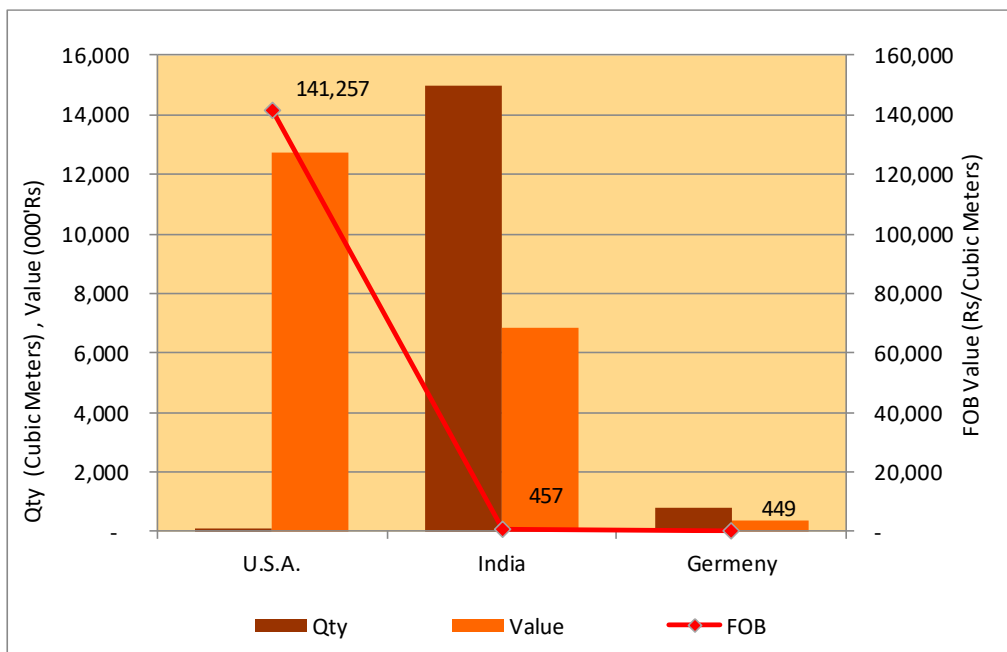
Figure 4.1.4: Major Imports Countries of Plywood, veneered panels and similar laminated wood - 2021

Resulted by the import restrictions imposed by the Government, the imports have dramatically decreased over the period. Imports has declined by 49% in 2021 compared to that of 2020.

Table 4.1.17: Wood and Wood Based Products Exports (2019-2021)

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Plywood, veneered panels and similar laminated wood.	MT	13	2	21	3	9	3
Plywood, veneered panels and similar laminated wood.	('000) Cubic Meters	119	128	2	127	16	30
Total	MT	13	2	21	3	9	3
Total	('000) Cubic Meters	119	128	2	127	16	30
Grand Total			130		129		33

Source: Sri Lanka Customs



Source : Sri Lanka Customs

Figure 4.1.5: Major Exports Countries of Plywood, Veneered Panels and Similar Laminated Wood - 2021

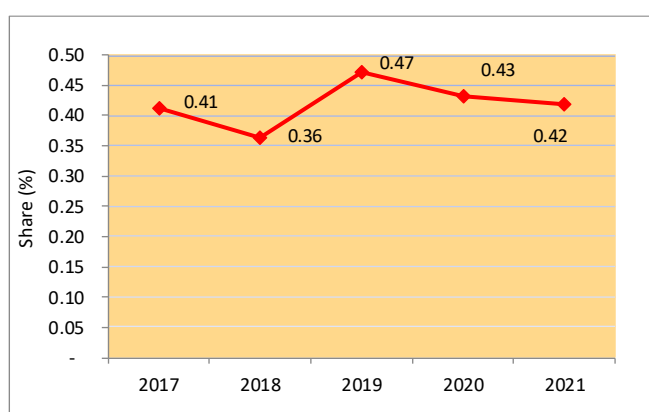
Exports of Wood and Wood based products slightly increased by 10.8% from 2019 to 2020 and by 12% from 2020 to 2021

4.2. FURNITURE INDUSTRY

Table 4.2.1: Manufacture of Furniture Product Contributions to the GDP at Current and Constant Market Price (2017 - 2021)

Year	Current		Constant	
	Contribution Value(Rs. Mn)	Share (%)	Contribution Value(Rs. Mn)	Share (%)
2017	54,751	0.41	97,920	1.05
2018	52,007	0.36	92,997	0.96
2019	70,576	0.47	96,829	0.98
2020	64,850	0.43	87,299	0.92
2021	70,381	0.42	88,415	0.89

Source : Department of Census and Statistics



The Contribution of furniture products to GDP started at slightly above 0.4% in 2017 and dramatically dropped up to 0.35% in 2018. In 2019 the figure peaked at above 0.45% and again declined to 0.42% in 2021.

Source : Department of Census and Statistics

Figure 4.2.1: The Contribution of the Furniture Products Sector to the share of the manufacturing industry to the GDP

Table 4.2.2: Manufacturing Establishments and Number of Persons Engaged of Furniture Products 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	900	9,808	75	9,154
2016	1,097	7,713	105	11,295
2017	979	7,187	73	9,684
2018	459	4,541	111	10,107
2019	812	5,773	52	8,555

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

Table 4.2.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Furniture Industry (2015) - (Establishments with 5 or more engaged)

2015								
Size	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	402	2,198	1,847	423,473,824	1,513,598,083	617,693,441	895,904,642	78,277,703
10 to 99	566	12,128	11,382	3,274,952,030	31,309,469,394	24,099,874,348	7,209,595,046	388,728,249
100 & above	7	4,635	4,635	1,774,246,213	8,900,658,724	5,877,109,900	3,023,548,824	499,208,616
Group total	975	18,961	17,864	5,472,672,067	41,723,726,201	30,594,677,689	11,129,048,512	966,214,568

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

Table 4.2.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Furniture Industry (2016) - (Establishments with 5 or more engaged)

2016								
Size	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	952	5,479	2,901	797,107,166	4,029,382,460	1,926,212,991	2,103,169,469	62,734,000
10 to 99	229	5,981	5,628	1,350,293,674	6,528,030,020	3,786,113,577	2,741,916,442	168,384,707
100 & above	21	7,548	7,544	2,909,392,799	36,234,468,477	26,643,706,332	9,590,762,145	1,798,291,758
Group total	1,202	19,008	16,073	5,056,793,639	46,791,880,957	32,356,032,900	14,435,848,056	2,029,410,465

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

Table 4.2.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Furniture Industry (2017) - (Establishments with 5 or more engaged)

2017								
Size	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	818	4,211	2,193	589,727,259	3,093,769,121	1,985,002,389	1,108,766,732	14,517,138
10 to 99	210	4,990	4,873	1,083,874,267	4,696,827,290	2,154,267,313	2,542,559,977	52,146,473
100 & above	24	7,670	7,670	2,852,216,941	40,474,764,039	27,329,419,057	13,145,344,982	4,110,297,169
Group total	1,052	16,871	14,736	4,525,818,467	48,265,360,450	31,468,688,759	16,796,671,691	4,176,960,780

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

Table 4.2.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Furniture Industry (2018) - (Establishments with 5 or more engaged)

2018								
Size	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	244	1,416	992	327,212,742	825,145,332	318,398,003	506,747,329	1,840,357
10 to 99	308	7,640	7,349	2,143,484,366	9,850,168,970	5,688,648,308	4,161,520,662	138,538,034
100 & above	18	5,592	5,589	2,014,894,487	25,135,257,036	17,261,471,758	7,873,785,278	2,106,870,485
Group total	570	14,648	13,930	4,485,591,595	35,810,571,338	23,268,518,069	12,542,053,269	2,247,248,876

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

Table 4.2.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Furniture Industry (2019) - (Establishments with 5 or more engaged)

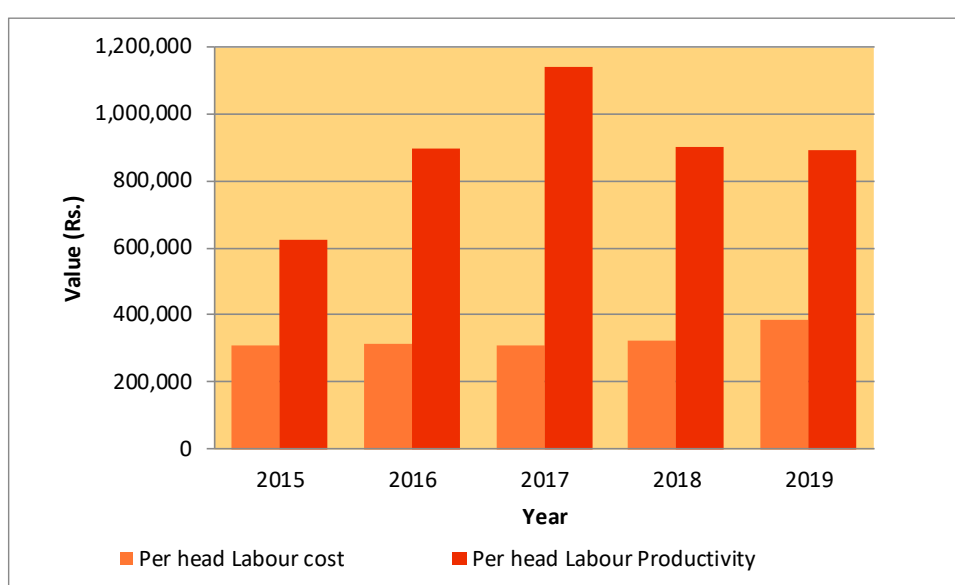
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	761	5,063	3,649	1,283,180,699	3,001,892,346	1,250,422,114	1,751,470,232	1,394,018
10 to 99	78	2,232	2,040	790,836,159	3,313,848,737	2,237,291,712	1,076,557,025	32,450,000
100 & above	25	7,033	7,027	2,823,415,812	26,498,355,456	18,013,152,892	8,485,202,564	1,144,824,836
Group total	864	14,328	12,716	4,897,432,670	32,814,096,539	21,500,866,718	11,313,229,821	1,178,668,854

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

Table 4.2.8: Manufacturing of Furniture Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	306,352	622,987	203.36
2016	314,614	898,143	285.47
2017	307,127	1,139,839	371.13
2018	322,009	900,363	279.61
2019	385,139	889,685	231.00

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



Source : Department of Census and Statistics

Figure 4.2.2: Manufacturing of Furniture Per Head Labour Productivity**Table 4.2.9: Value of Output & Output Components Classified by Furniture 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	17,975,554,154	17,598,417,740	253,772,516	123,363,898
2016	41,499,173,581	38,875,998,842	127,531,577	2,495,643,162
2017	42,805,761,575	40,605,483,277	260,270,691	1,940,007,607
2018	30,001,750,253	28,799,015,566	117,472,839	1,085,261,849
2019	29,225,175,723	28,100,331,923	27,843,598	1,097,000,202

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

Table 4.2.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Furniture 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	13,498,792,922	11,914,651,539	774,591,096	809,550,287
2016	29,718,873,674	25,534,780,106	2,533,543,328	1,650,550,241
2017	28,212,983,483	24,145,811,573	2,488,736,194	1,578,435,717
2018	20,368,377,067	16,997,645,195	2,267,001,912	1,103,729,960
2019	19,916,102,915	16,376,356,630	3,635,809,225	903,937,060

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

Table 4.2.11: Employment by Nature of Employment & Gender Classified by Furniture 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	50	9	-	-	5,308	1,968	1,520	298	6,878	2,275
2016	140	45	56	6	6,745	1,355	2,448	501	9,389	1,907
2017	36	7	6	6	5,661	1,210	2,330	427	8,033	1,650
2018	131	22	-	-	6,095	1,290	2,079	465	8,329	1,777
2019	92	22	-	-	5,626	1,108	1,513	193	7,231	1,323

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

Table 4.2.12: Categories of Employees by Nature of Employment Classified by Furniture Industry (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	9,094	4,457	2,819
2016	11,048	5,335	2,765
2017	9,629	4,985	1,887
2018	9,954	4,626	2,759
2019	8,440	4,809	1,925

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

**Table 4.2.13: Economic Indicators of Industrial Activity Classified by Furniture Industry Class
(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	
	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons
2015	2,421,283	1,963,784	1.389	1.332	1.715	2.705	678,245	489,075	0.389	0.332	0.480	0.674
2016	686,206	3,674,119	2.007	1.396	0.928	1.949	344,295	1,042,966	1.007	0.396	0.465	0.553
2017	759,633	4,420,370	1.677	1.517	0.990	1.629	306,644	2,714,033	0.677	0.517	0.400	0.555
2018	1,279,194	2,968,413	2.003	1.473	1.225	1.859	640,537	953,139	1.003	0.473	0.613	0.597
2019	621,691	3416291	2.265	1.467	1.937	2.797	347,170	1,088,189	1.265	0.467	1.082	0.891

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

**Table 4.2.14: Number of Furniture Products Manufacturing Industries and Engaged Persons in Sri Lanka
(2013/14 Economic Census)**

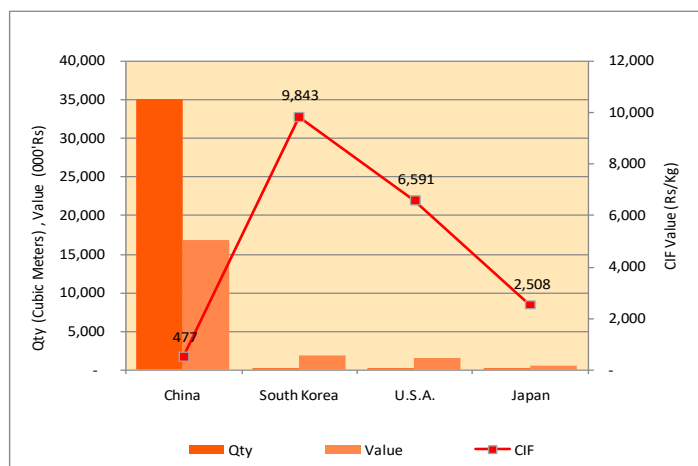
Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of wooden furniture	11,291	17,852	590	4,444	44	2,423	3	1,670
Manufacture of plastic furniture	38	83	4	41	4	381	3	1,729
Manufacture of all kind of metal furniture	369	592	62	573	13	481	-	-
Manufacture of furniture made out of bamboo, rattan, cane and similar materials	1,128	1,582	9	71	-	-	-	-
Manufacture of cabinets for sewing machines, televisions	3	6	-	-	1	35	-	-
Finishing of furniture such as spraying, painting, polishing, upholstering, weaving of chairs (using canes)	897	1,245	38	310	1	72	-	-
Manufacture of mattresses (Coir or rubber mixed)	121	209	21	212	8	523	1	200
Manufacture of other furniture n.e.c.	127	218	18	209	6	224	-	-
Total	13,974	21,787	742	5,860	77	4,139	7	3,599

Source: Department of Census and Statistics

Table 4.2.15: Furniture Products Imports (2019-2021)

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs.Mn)	Quantity	Value (Rs. Mn)
Tableware and kitchenware, of wood	MT	147	62	66	54	37	22
Total	MT	147	62	66	54	37	22

Source: Sri Lanka Customs



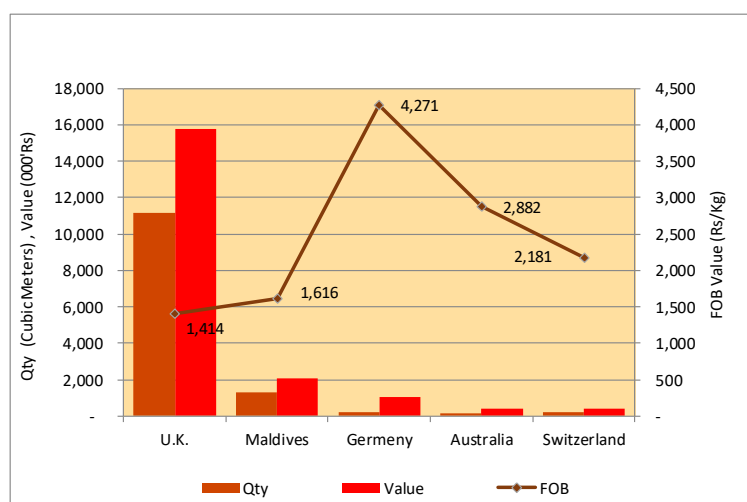
Source : Sri Lanka Customs

Figure 4.2.3: Major Imports Countries of Tableware and kitchenware, of wood - 2021

Table 4.2.16: Furniture Products Exports (2019-2021)

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Tableware and kitchenware, of wood	MT	19	18	36	45	15	21
Total	MT	19	18	36	45	15	21

Source: Sri Lanka Customs



Source : Sri Lanka Customs

Figure 4.2.4: Major Exports Countries of Tableware and kitchenware, of wood - 2021

Furniture products imports has drastically declined over the period due to the import restrictions from 2020 to 2021. The figure has declined by 59%. China accounts for highest imports of furniture products at 2021.

Exports of tableware and kitchenware show an increase of 150% 2019 to 2020. However, the exports have declined by 53% from 2020 to 2021.



5. PAPER & PAPER PRODUCTS INDUSTRY AND PACKAGING INDUSTRY

Overview

Different types of packaging can be seen in the country to safeguard the quality of the products and maintain a high level of consumer appeal. In the last few decades, Sri Lanka's packaging industry has achieved the highest growth rate of a developing country in Asia. Compared to the increasing export volumes of traditional industries and value-added manufacturing industries, the quality of local packaging has grown to a certain level by producing packaging in accordance with international standards, but it needs further growth and development. At present, industries have faced the challenge of developing and maintaining packaging industries while minimizing the impact on the environment and reducing costs due to packaging.

Several major types of packaging produced using different raw materials have achieved better demand for consumer products. Among these are Flexible Packaging, Corrugated Packaging, Paper Board Packaging, Metal Packaging, Glass Packaging, Rigid Plastic Packaging. Polythene related packaging (P.P. Woven Sack), Non-Woven Sacks and Wooden Boxes and Wooden Pallet related packaging are the main ones.

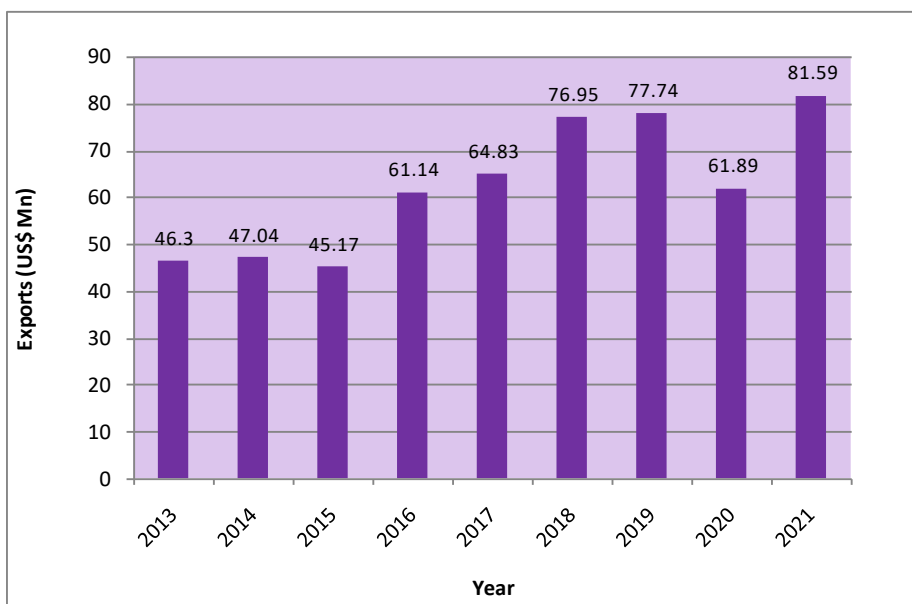
Table 1: Required raw materials and Product types

Plastic Packaging - Rigid Plastic Packaging		
Material Type	Product Type	End-User Industry
PE - HDPE & LDPE, PP, PET, PVC, PS and EPS	Bottles and Jars (Containers), Caps and Closures, Bulk-Grade Products - IBC, Crates & Pallets	Food, Beverage, Industrial and Construction, Automotive, Cosmetics and Personal Care
Plastic Packaging - Flexible Plastic Packaging		
PE, BOPP, CPP	Pouches, Bags, Films and Wraps	Food, Beverage, Pharmaceutical, Cosmetics and Personal Care
Corrugated Packaging		
WhiteTop Kraft Liner	Folding Carton, Corrugated Boxes, Single-use Paper Products	Food, Beverage, Industrial & Electronic, Cosmetics & Personal Care, Healthcare, House hold Care, Transportation of Automobile Components, Machinery.
Brown Kraft Liner		
Fluting Paper, Medium Paper		
Corn Starch		
Building Thread		
Stitching Wire		
Metal Packaging		
Tin and Aluminum Sheets	Cans (Food, Beverage, Aerosols, Others), Caps and Closures	Food, Beverage (Alcoholic, Non-Alcoholic), Personal Care and Cosmetics, Pharmaceuticals
Glass Packaging		
Soda ash (Sodium carbonate, Na 2CO3)	Glass bottles	
Silica sand (silicon dioxide (SiO2)) / known as quartz sand		
Limestone (calcium carbonate CaCO 3)		
chemical compound of aluminium and oxygen / Al2O3.		
Magnesium Oxide		
Cullet		

Total export earnings from the Packaging sector amounts to at USD 18 million by the end of 2021. Sector contribution to GDP stands at approximately 3%. .

As interest in packaging continues to grow and other sectors realize that they cannot survive in isolation without packaging, the industry is facing many challenges. The latest rise in prices started about a year and a half ago and has adversely affected the industry. As a result, the price of paper has increased by about 70%, and this upward trend is expected to increase by 100% by the end of this year.

The industry has recognized that it is imperative that all stakeholders and officials contribute to a sustainable and prosperous sector, while the industry is equipped with adequate infrastructure to support the future growth of the Sri Lankan economy.



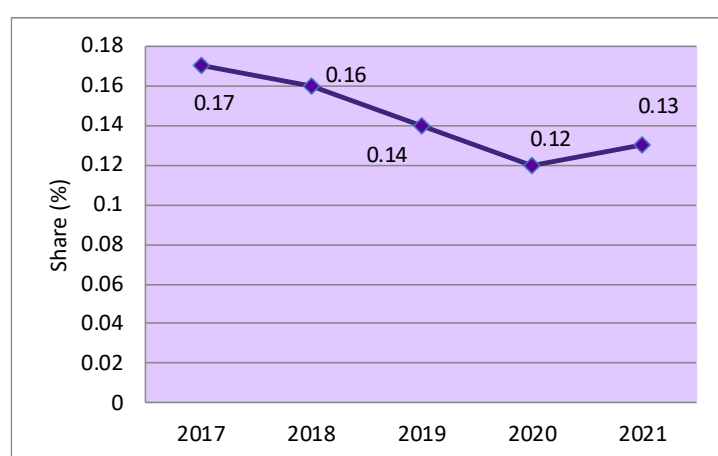
Source; Export Development Board

Figure 5.1: Exports Value of Printing and Stationery Products Industry

Table 5.1: Manufacture of Paper and Paper Products Industry Sector Contributions to the GDP at Current and Constant Market Price (2017 - 2021)

Year	Current		Constant	
	Contribution Value (Rs. Mn)	Share (%) of Total Current GDP	Contribution Value (Rs.Mn)	Share (%) of Total Constant GDP
2017	23,026	0.17	9,308	0.1
2018	22,716	0.16	8,220	0.09
2019	20,591	0.14	7,494	0.08
2020	18,346	0.12	6,570	0.07
2021	22,128	0.13	7,133	0.07

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 5.2: The Contribution of the Paper and Paper Products Industry Sector to the Share of the Manufacturing Industry to the GDP

Table 5.2: Manufacturing Establishments and Number of Persons Engaged of Paper and Paper Products Industry Sector (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	42	593	66	6,476
2016	35	344	56	7,603
2017	77	694	88	8,328
2018	127	1,378	38	5,021
2019	70	718	54	5,215

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

Table 5.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Paper and Paper Products Industry (2015) - Establishments with 5 or more engaged)

2015								
Size	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	7	24	6	1,474,200	1,619,188	1,187,838	431,350	-
10 to 99	91	3,167	3,077	1,040,730,634	12,868,881,247	5,951,104,674	6,917,776,574	620,632,539
100 & above	10	3,878	3,878	1,786,269,785	20,429,007,255	12,536,558,175	7,892,449,080	957,871,810
Group Total	108	7,069	6,961	2,828,474,618	33,299,507,689	18,488,850,687	14,810,657,003	1,578,504,349

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

Table 5.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Paper and Paper Products Industry (2016) - Establishments with 5 or more engaged)

2016								
Size	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	21	116	56	7,481,866	22,278,410	11,283,358	10,995,052	10,000
10 to 99	55	3,205	3,090	992,740,762	8,695,028,318	4,245,259,579	4,449,768,739	1,076,949,242
100 & above	15	4,626	4,619	2,491,649,606	29,000,673,676	17,617,709,630	11,382,964,046	1,184,119,393
Group Total	91	7,947	7,766	3,491,872,235	37,717,980,404	21,874,252,568	15,843,727,836	2,261,078,635

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

Table 5.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Paper and Paper Products Industry (2017) - Establishments with 5 or more engaged)

2017								
Size	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	54	330	194	35,253,160	53,649,057	24,340,229	29,308,828	-
10 to 99	100	4,673	4,542	1,271,621,736	8,831,941,662	4,904,834,048	3,927,107,614	729,357,981
100 & above	11	4,018	4,018	2,363,553,967	29,882,438,413	17,236,536,666	12,645,901,747	1,766,246,260
Group Total	165	9,022	8,754	3,670,428,863	38,768,029,132	22,165,710,943	16,602,318,189	2,495,604,241

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

Table 5.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Paper and Paper Products Industry (2018) - Establishments with 5 or more engaged)

2018								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Out put (Rs)	Intermediate consumptions (Rs)	Value added (Rs)	Gross addition to fixed assets (Rs)
less than 10	58	356	163	21,157,869	51,066,876	28,710,003	22,356,873	-
10 to 99	90	1,963	1,836	416,393,483	6,506,826,229	2,960,503,695	3,546,322,534	1,820,537,569
100 & above	17	4,079	4,078	2,766,429,249	32,449,721,486	19,265,967,104	13,183,754,382	876,456,714
Group Total	165	6,399	6,078	3,203,980,600	39,007,614,591	22,255,180,803	16,752,433,788	2,696,994,282

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

Table 5.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Paper and Paper Products Industry (2019) - Establishments with 5 or more engaged)

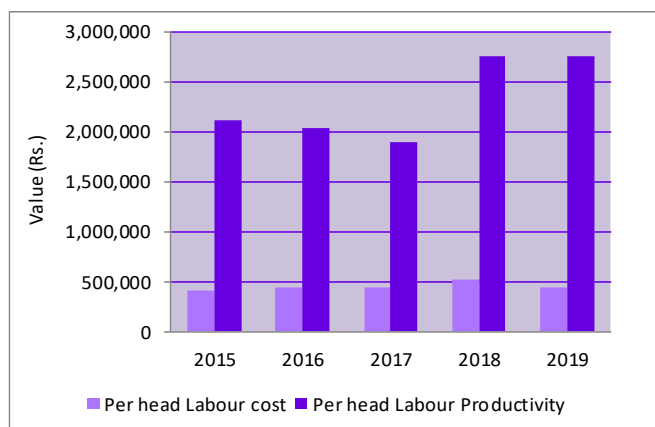
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Out put (Rs)	Intermediate consumptions (Rs)	Value added (Rs)	Gross addition to fixed assets (Rs)
less than 10	48	281	138	20,460,450	37,796,239	18,269,681	19,526,558	-
10 to 99	66	2,821	2,724	931,498,190	10,755,046,219	6,484,780,997	4,270,265,222	11,884,458
100 & above	10	2,831	2,831	1,618,778,873	30,576,087,890	18,761,589,890	11,814,498,000	951,633,123
Group Total	124	5,933	5,693	2,570,737,513	41,368,930,348	25,264,640,567	16,104,289,780	963,517,581

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

Table 5.8: Manufacturing of Packaging Per Head Labour Productivity of Paper and Paper Products Industry

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	406,332	2,127,662	5.24
2016	449,636	2,040,140	4.54
2017	451,561	1,896,541	4.20
2018	527,144	2,756,241	5.23
2019	451,561	2,756,241	6.10

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



Source : Department of Census and Statistics

Figure 5.3: Manufacturing of Packaging Per Head Labour Productivity of Paper and Paper Products Industry

Table 5.9: Value of Output & Output Components Classified by Industry of Paper and Paper Products 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	31,945,439,030	30,954,664,184	572,671,778	418,103,068
2016	37,155,023,826	36,734,348,578	(93,246,322)	513,921,571
2017	37,990,171,548	37,122,126,595	113,782,211	754,262,742
2018	33,372,565,087	32,564,914,874	229,060,920	578,589,293
2019	40,266,677,545	39,293,569,182	483,005,601	490,102,762

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

Table 5.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Paper and Paper Products 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	17,449,472,284	14,893,994,385	1,822,006,699	733,471,200
2016	21,443,999,335	18,536,326,148	2,484,038,896	423,634,292
2017	21,705	18,605,852,001	2,644,529,586	454,902,797
2018	19,720,092,530	16,554,425,229	2,734,021,694	431,645,606
2019	24,563,023,437	21,864,708,852	2,282,974,696	415,339,889

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

Table 5.11: Employment by Nature of Employment & Gender Classified by Division of Paper and Paper Products Industry - 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	6	2	0	0	4227	1142	856	243	5089	1387
2016	62	21	0	0	3548	1502	1836	634	5446	2158
2017	31	31	0	2	3827	2065	1907	466	5765	2563
2018	15	7	4	4	2472	871	1201	446	3693	1328
2019	28	23	4	4	2326	684	1548	597	3907	1308

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

Table 5.12: Categories of Employees by Nature of Employment Classified by Paper and Paper Products Industry (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	6,468	4,595	774
2016	7,520	3,944	1,106
2017	8,265	4,332	1,559
2018	4,990	2,108	1,236
2019	5,156	2,057	953

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

Table 5.13: Economic Indicators of Industrial Activity Classified by Industry Class of Paper and Paper Products 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	
	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons
2016	1,637,454	4,886,677	1.308	1.733	2.627	3.188	385,990	2,066,335	0.308	0.733	0.619	1.348
2017	1,121,374	4,561,723	1.689	1.750	2.304	2.296	457,615	1,986,627	0.689	0.750	0.940	0.984
2018	4,089,296	6,646,597	2.223	1.692	0.557	2.824	2,249,609	2,719,074	1.223	0.692	0.306	1.155
2019	1,534,808	7,720,993	1.571	1.639	0.628	2.705	557,856	3,011,120	0.571	0.639	0.228	1.055

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

Table 5.14: Categories of Employees by Nature of Employment Classified by Paper and Paper Products Industry (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	6,468	4,595	774
2016	7,520	3,944	1,106
2017	8,265	4,332	1,559
2018	4,990	2,108	1,236
2019	5,156	2,057	953

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

Table 5.15: Number of Paper and Paper Products Industry Sector Products Manufacturing Industries and Engaged Persons in Sri Lanka

(2013/14 Economic Census)

Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manu. of paper and paper board	12	24	10	136	4	206	2	510
Manufacture of handmade paper	49	64	1	10	1	120	-	-
Manu. Of other types of paper n.e.c.	32	47	1	9	1	40	-	-
Manufacture of folding paper board containers	28	47	9	101	11	627	-	-
Manufacture of containers of solid paper	9	17	5	68	1	40	2	775
Manufacture of corrugated paper and paper board	3	6	1	8	1	60	1	300
Manufacture of containers of corrugated paper or paper board	3	8	3	50	1	35	-	-
Manufacture of sacks and bags of paper and paper boards	253	324	7	42	9	524	-	-
Manufacture of office box files and similar articles	4	7	5	70	1	60	-	-
Manufacture of other containers and boxes of paper or paper board n.e.c.	847	1117	41	362	21	1326	2	518
Manufacture of personal hygiene paper products	-	-	3	15	2	58	-	-
Manufacture of household paper products (eg. plates, cups, trays etc.)	10	15	2	21	-	-	-	-
Manufacture of printing and writing papers ready for use, computer paper, copy paper, stencils, carbon paper and	6	8	1	8	1	25	-	-
Manufacture of envelopes	143	210	18	143	-	-	-	-
Manufacture of books, registers and all other stationary	237	321	21	172	14	956	1	1133
Manufacture of vesak lanterns made of paper	22	49	4	36	-	-	-	-
Manufacture of other articles of paper and paperboard n.e.c.	94	147	7	65	-	-	2	920
Total	1752	2411	139	1316	68	4077	10	4156

Source: Department of Census and Statistics

Table 5.16:Packaging Sector Imports (2019-2021)**Table 5.16.1: Imports of Corrugated Manufacturing and Printing**

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Uncoated Kraft paper and paper board, in rolls or sheets	MT	70,542	9,279	74,962	8,585	66,659	10,863
Other Uncoated Kraft paper and paper board, in rolls or sheets	MT	106,293	7,832	89,278	6,951	112,565	13,207
Cartons, boxes, cases bags and other packing containers	MT	5,154	2,221	4,596	2,012	3,868	2,614
Products of the milling industry; malt; starches; inulin; wheat gluten	MT	15,723	1,147	15,502	1,072	16,725	1,508
Aluminum foil (whether or not printed backed with paper, paperboard, plastics or similar backing materials) of a thickness (excluding any backing) not exceeding 0.2 mm (+).	MT	612	355	804	458	550	391
Paints and varnishes (including enamels and lacquers) based on synthetic polymers or chemically modified natural polymers, dispersed or dissolved in an aqueous medium; solutions as defined in Note 4 to this Chapter.	MT	3,171	2,751	3,097	2,455	4,036	3,393
Paints and varnishes (including enamels and lacquers) based on synthetic polymers or chemically modified natural polymers, dispersed or dissolved in an aqueous medium.	MT	1,054	802	822	660	1,083	1,050
printing ink, writing or drawing ink and other inks	MT	2,900	4,229	2,694	3,984	2,423	4,374
prepared glue and other prepared adhesives	MT	4,318	3,018	3,876	2,780	3,822	3,622
Other plates, sheets, film, foil and strip of plastics.	MT	13,120	5,224	0.056	4,413	11,240	5,774
Newsprint, in rolls or sheets.	MT	37,823	4,187	22,976	2,036	24,806	2,703
Uncoated paper and paperboard, of a kind used for writing, printing or other graphic purposes, and non perforated punch- cards and punch tape paper, in rolls or rectangular (including square) sheets, of any size	MT	123,132	22,437	100,455	17,864,	92,172	19,555
Toilet or facial tissue stock, towel or napkin stock and similar paper of a kind used for household or sanitary purposes, cellulose wadding and webs of cellulose fibres,whether or not creped, crinkled, embossed, perforated, surface-decorated or printed, in rolls or sheets.	MT	3,926	786	2,980	535	3,369	756
Vegetable parchment, greaseproof papers, tracing papers and glassine and other glazed transparent or translucent papers, in rolls or sheets.	MT	713	210	689	166	592	158
Composite paper and paper board(made by sticking flat layers of paper or paperboard together with an adhesive), not surface-coated or impregnated, whether or not internally reinforced, in rolls or sheets	MT	1,360	234	1,000	147	1,812	345

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Paper and paperboard. Corrugated (with or without glued flat surface sheets) creped, crinkled, embossed or perforated, in rolls or sheets, other than paper of the kind described in heading 48.03	MT	817	121	787	174	426	152
paper and paper board	MT	122,989	15,064	117,633	14,352	120,363	20,048
Paper, paperboard cellulose wadding and webs of cellulose fibers, coated, impregnated, covered, surface-coloured, surface-decorated or printed, in rolls or rectangular (including square) sheets, of any size, other than goods of the kind described in heading 48.03, 48.09 or 48.10	MT	14,940	7,040	14,989	7,001	14,654	7,881
Cigarette paper, whether or not cut to size or in the form of booklets or tubes	MT	202	105	157	91	197	123
Wall paper a similar wall covering, window transparencies of paper	MT	117	75	74	199	95	54
Envelopes, letter cards, plain postcards and correspondence cards of paper or paperboard boxes, pouched, wallets and writing compendiums, of paper or paperboard, containing an assortment of paper stationery	MT	43	31	44	31	57	34
Toilet paper and similar paper, cellulose wadding or webs of cellulose fibers, of a kind used for household or sanitary purpose, in rolls of a width not exceeding 36cm, or cut to size or shape, handkerchiefs, cleansing tissues, towels, table cloths, serviettes, bed sheets or similar household, sanitary or hospital articles, articles of apparel and clothing accessories, of paper pulp, paper, cellulose wadding or webs of cellulose fibers.	MT	3,711	856	3,448	690	3,252	808
Registers, account books, note books, order books, receipts books, letter pads memorandum pads diaries and similar articles, exercise books, blotting-pads, binders (loose-leaf or other), folders, file covers. Manifold business forms, interleaved carbon sets and other articles of stationery, of paper or paperboard, albums for sample or for collections and book covers, of paper or paperboard	MT	217	74	102	38	158	49
paper and paper board labels or other kind	MT	1,536	3,888	0.666	3,580	1,601	5,063
Transfers	MT	439	2,951	412	2,270	561	3,218
Total	MT	534,863	94,928	461,386	82,556	487,099	107,753

Source : Sri Lanka Customs

Table 5.16.2: Imports of Laminated and Flexible Packaging

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Other plates, sheets, film, foil, tape	MT	27,871	12,606	32,450	13,403	29,597	16,291
Articles for the conveyance or packing of goods, of plastics:	MT	9,568	7,508	7,727	6,530	8,082	8,358
prepared binders for foundry	MT	48,291	7,114	40,897	6,243	44,731	8,687
Total	MT	85,731	27,229	60,841	19,112	82,411	33,338

Source: Sri Lanka Customs

Table 5.16.3: Imports of Metal Packaging

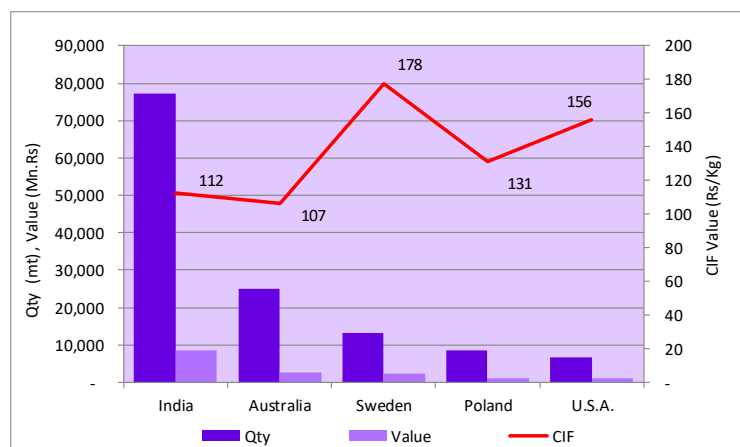
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Tanks, casks ,drums, cans, boxes and similar containers	MT	14,596	6,820	1,623	265	163	159
Stoppers, caps and lids	MT	2,685	1,981	1,018	672	218	187
Total	MT	17,282	8,801	2,642	938	382	347

Source : Sri Lanka Customs

Table 5.16.4: Imports of Glass Packaging

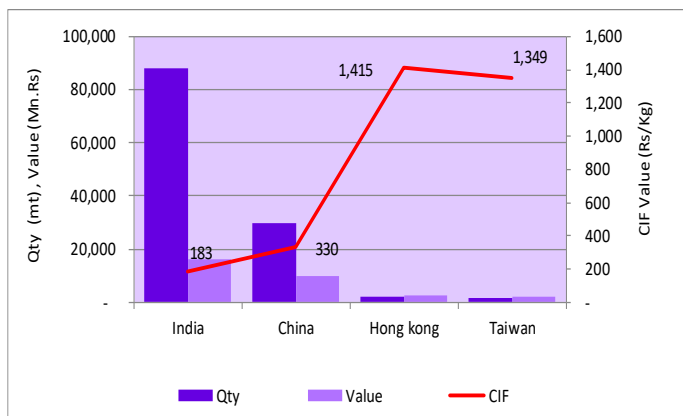
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
carboys, bottles flasks jars, pots, phials....of a kind used for the conveyance or packing of goods	MT	14,248	1,501	22,301	2,412	26,938	3,602
Total	MT	14,248	1,501	22,301	2,412	26,938	3,602

Source: Sri Lanka Customs



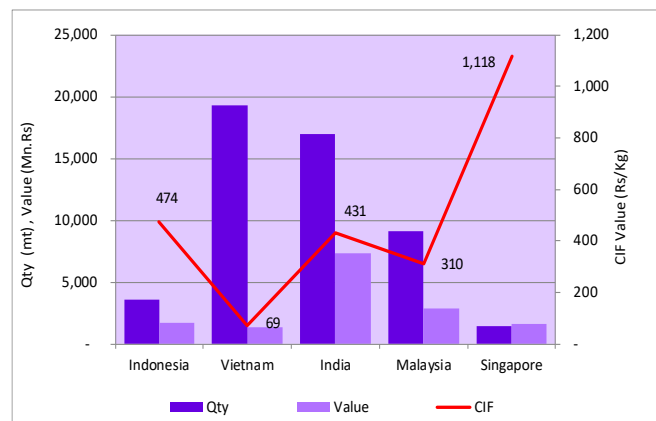
Source : Sri Lanka Customs

Figure 5.4: Major Imports Countries of Corrugated Manufacturing - 2021



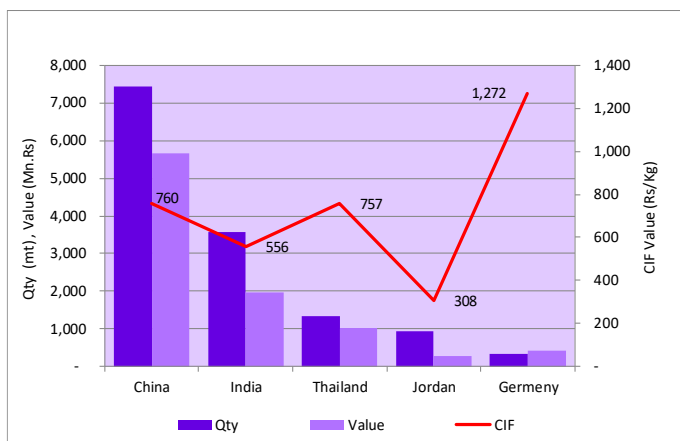
Source : Sri Lanka Customs

Figure 5.5: Major Imports Countries of Printing - 2021



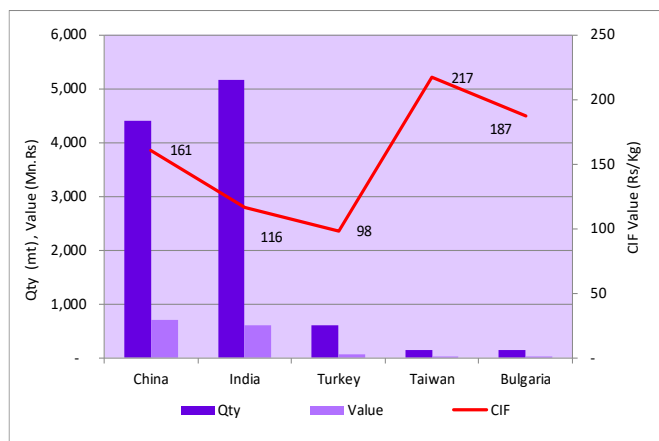
Source : Sri Lanka Customs

Figure 5.6: Major Imports Countries of Laminated and Flexible Packaging- 2021



Source : Sri Lanka Customs

Figure 5.7: Major Imports Countries of Metal Packaging- 2021



Source : Sri Lanka Customs

Figure 5.8: Major Imports Countries of Glass Packaging - 2021

Table 5.17: Packaging Sector Exports (2019-2021)

Table 5.17.1: Exports of Laminated and Flexible Packaging

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Other plates,sheets,film,foil,tape	MT	1,296	556	1,019	484	1,512	881
Articles for the conveyance or packing of goods, of plastics:	MT	15,171	6,364	11,888	5,483	13,221	6,862
prepared binders for foundry	MT	1,943	424	13,224	608	2,301	572
Total	MT	18,411	7,345	26,132	6,576	17,034	8,317

Source: Sri Lanka Customs

Table 5.17.2: Exports of Corrugated Manufacturing and Printing

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Uncoated Kraft paper and paper board, in rolls or sheets	MT	3,347	283	1,485	131	2,403	331
Other Uncoated Kraft paper and paper board, in rolls or sheets	MT	13,092	980	11,421	786	3,911	517
Cartons, boxes, cases bags and other packing containers	MT	18,322	5,445	13,271	4,178	14,401	6,164
Products of the milling industry; malt; starches; inulin; wheat gluten	MT	157	10	218	11	318	29
Aluminum foil (whether or not printed backed with paper, paperboard, plastics or similar backing material's) of a thickness (excluding any backing) not exceeding 0.2 mm (+).	MT	1,572	781	834	369	2	0.97
Paints and varnishes (including enamels and lacquers) based on synthetic polymers or chemically modified natural polymers, dispersed or dissolved in an aqueous medium; solutions as defined in Note 4 to this Chapter.	MT	1,164	723	729	523	1,023	820
Paints and varnishes (including enamels and lacquers) based on synthetic polymers or chemically modified natural polymers, dispersed or dissolved in an aqueous medium.	MT	20	13	76	28	84	63
printing ink, writing or drawing ink and other inks	MT	16	28	10	25	15	68
prepared glue and other prepared adhesives	MT	22	14	128	45	280	47
Other plates, sheets, film, foil and strip of plastics.	MT	764	281	559	198	990	502
Newsprint, in rolls or sheets.	MT	8	1	25	3	19	2
Uncoated paper and paperboard, of a kind used for writing, printing or other graphic purposes, and non perforated punch- cards and punch tape paper, in rolls or rectangular (including square) sheets, of any size, other than paper of heading 48.01 or 48.03; hand- made paper and paper board.	MT	342	118	474	117	444	142
Toilet or facial tissue stock, towel or napkin stock and similar paper of a kind used for household or sanitary purposes, cellulose wadding and webs of cellulose fibres, whether or not creped, crinkled, embossed, perforated, surface-decorated or printed, in rolls or sheets.	MT	3	1	4	2	1	866,402
Vegetable parchment, greaseproof papers, tracing papers and glassine and other glazed transparent or translucent papers, in rolls or sheets.	MT	12	10	1,485	0.041	0.655	2
Composite paper and paper board(made by sticking flat layers of paper or paperboard together with an adhesive), not surface-coated or impregnated, whether or not internally reinforced, in rolls or sheets	MT	42	24	0.016	0.278	0.395	3

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Paper and paperboard. Corrugated (with or without glued flat surface sheets) creped, crinkled, embossed or perforated, in rolls or sheets, other than paper of the kind described in heading 48.03	MT	90	35	63	22	35	13
paper and paper board	MT	823	205	725	163	672	204
Paper, paperboard cellulose wadding and webs of cellulose fibers, coated, impregnated, covered, surface-coloured, surface-decorated or printed, in rolls or rectangular(including square) sheets, of any size, other than goods of the kind described in heading 48.03,48.09 or 48.10	MT	230	190	273	149	2,051	433
Cigarette paper, whether or not cut to size or in the form of booklets or tubes	MT	0.095	0.17	-	-	12	58
Wallpapering similar wall covering , window transparencies of paper	MT	0.118	0.225	0.014	0.26	4	3
Envelopes, letter cards, plain postcards and correspondence cards of paper or paperboard boxes, pouched, wallets and writing compendiums, of paper or paperboard, containing an assortment of paper stationery	MT	175	142	474	329	521	345
Toilet paper and similar paper, cellulose wadding or webs of cellulose fibers, of a kind used for household or sanitary purpose, in rolls of a width not exceeding 36cm, or cut to size or shape, handkerchiefs, cleansing tissues, towels, table cloths, serviettes, bed sheets or similar household, sanitary or hospital articles, articles of appeal and clothing accessories, of paper pulp, paper, cellulose wadding webs of cellulose fibers.	MT	207	86	254	106	300	135
Registers, account books, note books, order books, receipts books, letter pads memorandum pads diaries and similar articles, exercise books, blotting-pads, binders (loose-leaf or other), folders, file covers. Manifold business forms, interleaved carbon sets and other articles of stationary, of paper or paperboard, albums for sample or for collections and book covers, of paper or paperboard	MT	3,056	845	2,607	729	2,702	857
paper and paper board labels or other kind	MT	2,819	2,193	3,800	2,569	3,935	2,895
Transfers	MT	27	306	26	385	66	1,059
Total	MT	46,322	12,724	38,953	10,879	34,203	14,704

Source : Sri Lanka Customs

Table 5.17.3: Exports of Metal Packaging

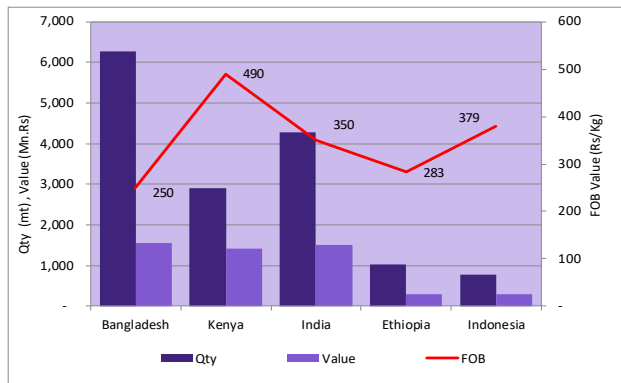
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs)	Quantity	Value (Rs)	Quantity	Value (Rs)
Tanks, casks, drums, cans, boxes and similar containers	MT	3,839	629	1,623	265	163	159
Stoppers, caps and lids	MT	1,097	625	1,018	672	218	187
Total	MT	4,936	1,254	2,642	938	382	347

Source: Sri Lanka Customs

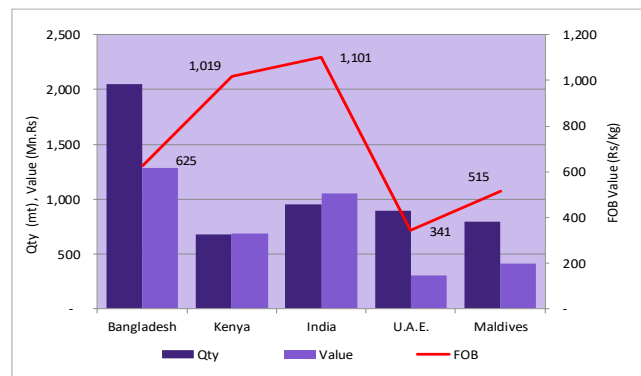
Table 5.17.4: Exports of Glass Packaging

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
carboys, bottles flasks jars, pots, phials....of a kind used for the conveyance or packing of goods	MT	30,780	2,689	22,301	2,412	26,938	3,602
Total	MT	30,780	2,689	22,301	2,412	26,938	3,602

Source: Sri Lanka Customs



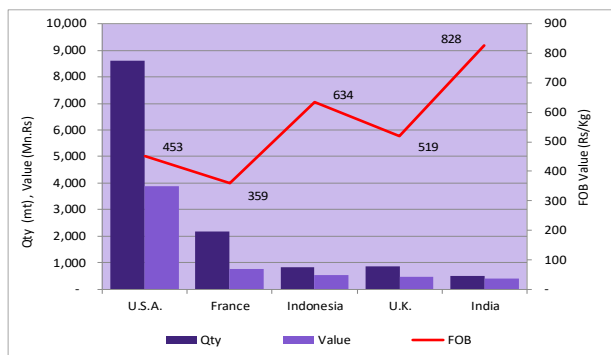
Source : Sri Lanka Customs



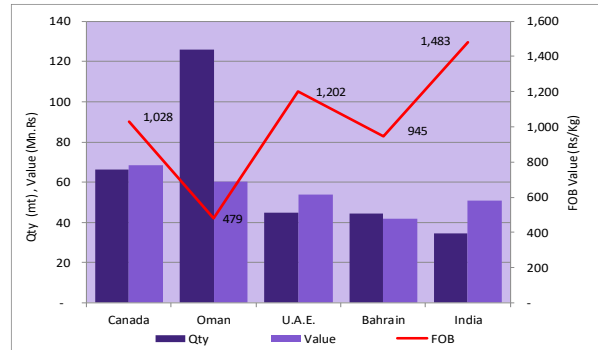
Source : Sri Lanka Customs

Figure 5.9: Major Exports Countries of Corrugated Manufacturing - 2021

Figure 5.10: Major Exports Countries of Printing - 2021



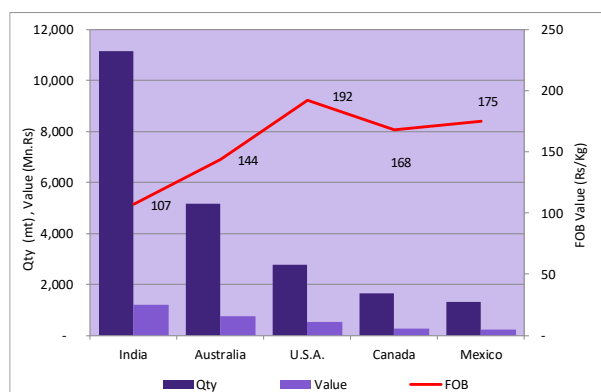
Source : Sri Lanka Customs



Source : Sri Lanka Customs

Figure 5.11: Major Exports Countries of Laminated and Flexible Packaging- 2021

Figure 5.12: Major Exports Countries of Metal Packaging- 2021



Source : Sri Lanka Customs

Figure 5.13: Major Exports Countries of Glass Packaging- 2021



6. BOAT BUILDING INDUSTRY

Overview

The boat and ship building industry has shown substantial development within the last few years. The industry has been branded as one of the key players in the export sector of Sri Lanka. The core business activities of the sector include Manufacturing of Pleasure Boats, Commercial Boats, Fishing Boats & Military vessels, Pre-production services including boat design, lofting, plug making, mould making, supplying of engine, navigation and communication equipment, refrigeration systems, sail makers and fire and safety equipment, Post-production services including boat storage, transport devices, diving and fishing equipment, boat and engine maintenance and repairs, Ship building and ship repairing. Sri Lanka is capable of design and building both Fiberglass and steel hull vessels and specializes in High Speed Patrol Boats (speeds surpassing 50 knots) built to indigenous, battle-proven designs.

Total export earnings from the Boat building sector amounts to at USD 38 million by the end of 2021. The Sector Contributed 0.31% to total merchandise exports in year 2021. This is while receiving USD 10.25 billion from USA, the largest buyer of the Sri Lankan Boat building sector. UK, Norway, Sweden, Holland, France, Iran, UAE, Yemen, Somalia, Gambia, Nigeria, Pakistan, India, Bangladesh, Maldives, Seychelles, Singapore and Mauritius are other major export destinations available for country's boat building sector products. Sector contribution to GDP stands at approximately 0.15%.

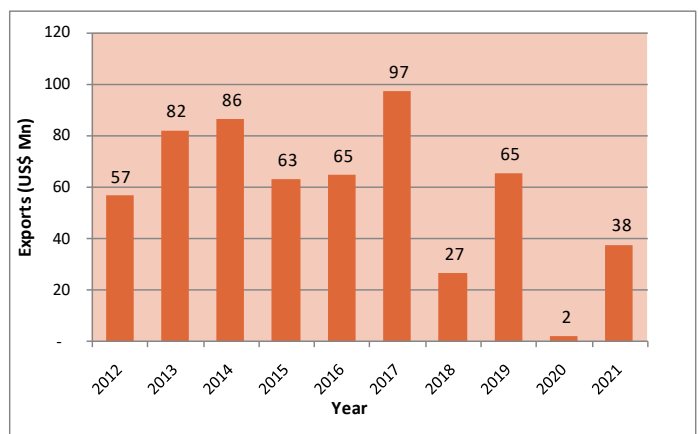
Boat building sector mainly imports URP resins, Core Mat, SS316 Ladders, Marine plywood, Marine Glass windows, Propellers etc. which accounted for USD 10 million in 2021. The imports have been declined by around 67% from the value of USD 6 billion recorded in 2020 due to the measures taken by the government to temporary suspend the imports.

The boat building sector in Sri Lanka is comprised of specific benefits such as the Strategic location of the country, Island surrounded by the sea, Potential to host international yachting and nautical tourism events, State of the art training centers, growing interest in boating activities in Sri Lanka, Rapid development in port related constructions and Modernization and development of the Fisheries industry.

There are around 76 active boat yards in the boat building sector. The industry provides direct employment for about 5,000 people and indirect employment for more than 15,000 people who are in support activities of the sector. All companies of boat manufacturing industry in Sri Lanka, are encouraged to share the responsibility for sustained quality improvements by introducing and implementing innovative ideas through updating and controlling the quality processes in systematic manner with consist supervision and leadership. This is to ensure that tasks are completed in the most cost effective and timely manner.

The sector has also been identified as one of the key visionary sectors in the National Export Strategy 2018-2022 for Sri Lanka. Having identified the potential, the Boat Building industry has to contribute to the export earnings, the National Budget 2018 allocated funds to establish necessary infrastructure facilities required for the boating industry and to develop a regulatory framework covering the entire value chain of the industry (excluding fishing boats). EDB initiated work related to the implementation of the aforementioned budget proposals and has submitted Regulatory Framework for the boat building sector to the implementing authorities. Moreover, feasibility study on construction of water Break at Kapparahota(Weligama) has been completed and Environmental Impact Assessment (EIA) is being done.

The global boat building industry has shifted from fiberglass to polymer composite structures and use advanced composite moulding technologies. In Sri Lanka, few industry players use advanced materials and technologies to be on par with global counterparts. Lack of infrastructure facilities within state universities for transforming advanced composite manufacturing technologies is a key barrier for future development of the boat building sector in Sri Lanka.



6.1 Exports Value of Boat Building Products Industry

Source; Export Development Board

Table 6.1: Number of Boat Building Products Manufacturing Industries and Engaged Persons in Sri Lanka

(2013/14 Economic Census)

Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
30111: Manufacture of ships or sections for ships	-	-	-	-	-	-	1	3000
30112: Manufacture of boats and passenger vessels	30	66	27	225	9	500	1	211
30113: Manufacture of other ships and floating structures n.e.c.	2	3	2	12	2	222	1	217
30120: Building of pleasure & sporting boats	1	2	-	-	-	-	-	-
Total	33	71	29	237	11	722	3	3428

Source: Department of Census and Statistics

Table 6.2: Boat Building Products Imports (2019-2021)

Description	2019		2020		2021	
	Qty (No)	Value (Rs.Mn)	Qty(No)	Value (Rs. Mn)	Qty (No)	Value (Rs. Mn)
Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods.	3	227	3	199	11	1,270
Fishing vessels; factory ships and other vessels for processing or preserving fishery products	5	37	7	48	2	0.15
Yachts and other vessels for pleasure or sports; rowing boats and canoes(+)	1,153	85	228	83	401	167
Tugs and pusher crafts	1	161	1	20	2	173
Light vessels, fire- floats, dredgers, floating cranes, and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms.	5	355	6	112	2	130
Other vessels, including warships and lifeboats other than rowing boats	3	53	5	455	532	76
Other floating structure	16,868	1,085	66,436	184	9,980	230
Vessels and other floating structures for breaking up	1	0.01	8	16	1	0.88
Grand Total	18,039	2,006	66,694	1,120	10,931	2,051

Source: Sri Lanka Customs

Table 6.3: Boat Building Products Exports (2019-2021)

Description	2019		2020		2021	
	Qty(No)	Value (Rs. Mn)	Qty(No)	Value (Rs. Mn)	Qty(No)	Value (Rs. Mn)
Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods.	18	660	10	126	6	6,608
Fishing vessels; factory ships and other vessels for processing or preserving fishery products	513	224	306	114	646	260
Yachts and other vessels for pleasure or sports; rowing boats and canoes(+)	1,828	221	1,876	185	2,598	710
Tugs and pusher crafts	-	-	-	-	-	-
Light vessels, fire- floats, dredgers, floating cranes, and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms.	1	10,323	1	1	-	-
Other vessels, including warships and lifeboats other than rowing boats	1	15	1	14	3	16
Other floating structure	6,807	125	-	-	38	1
Vessels and other floating structures for breaking up	-	-	-	-	-	-
Grand Total	9,168	11,570	2,194	441	3,291	7,597

Source: Sri Lanka Customs



7. PHARMACEUTICAL INDUSTRY

Overview

Sri Lanka's pharmaceutical market is expected to reach a value of USD750 million by 2025, with a five-year compound annual growth rate (CAGR) of 4.1%. Pharmaceutical sector is identified as one of the potential industries to attract Foreign Direct Investment largely.

The sector comprises of companies that manufacture biological, medicinal and pharmaceutical products in various forms, including ampoules, tablets, capsules, vials, ointments, powders, solutions and suspensions. Industry products are predominantly distributed via wholesalers, and are then sold via pharmacies or distributed in hospitals.

Around 85% of the demand for finished pharmaceutical products (FPPs) in Sri Lanka is met by imports. In 2021, medical & pharmaceutical products imports reached a value of USD 763 million which accounts for 3.79% of total imports in 2021. This is a 319% increase compared to medical and pharmaceutical products imports amounted to USD 182 million in 2020. India is by far the largest FPP importing partner of Sri Lanka accounting for nearly 50% of imports, followed by Pakistan and France which accounts for 10% each.

All drugs imported for the state sector are procured through the State Pharmaceutical Corporation (SPC). The government's Medical Supplies Division (MSD) and the regional MSDs distribute drugs via state hospitals while the SPC retail outlets.

Currently, 20 pharmaceutical manufacturers have been approved by the National Medical Regulatory Authority(NMRA). State Pharmaceuticals Manufacturing Corporation(SPMC) is the only public manufacturer. Domestic production mainly entails the manufacture of generic drugs.

Currently, there are 150 locally manufactured brands listed in the NMRA. Most of these brands have different forms capsules, tablets, syrups etc. which, make up 300 types and dosages of drugs that are manufactured in Sri Lanka.

Production capacity of the local manufacturers is approximately 8.5 billion units of medicines per year and some of these manufacturers are planning for capacity expansions with the intent of exporting or signing up for contract manufacturing.

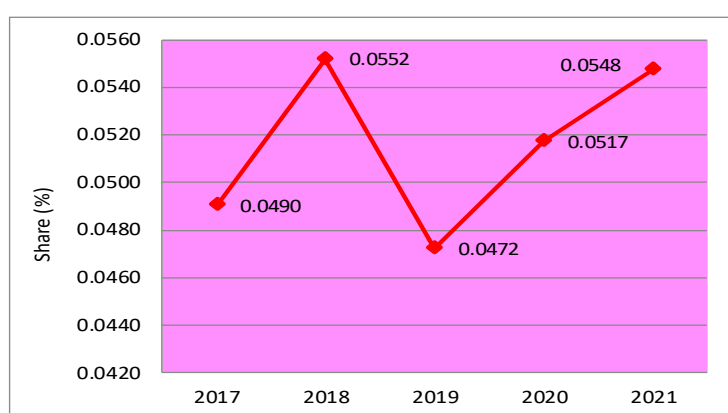
Total export earnings from the pharmaceutical sector amounts to USD 7.5 million by the end of 2021. The Sector Contributed 0.06% to total exports in year 2021. Major buyers of the Sri Lankan Pharmaceuticals are USA, Malaysia, Egypt, UAE, Venezuela and Pakistan.

Looking ahead, the sector comprises of potential activities for investments such as formulation of antibiotics, manufacture of antibiotics, formulation of other products (chemical/plant extracts), manufacture of other products (chemical/plant extracts), manufacture of three types of main Radiopharmaceuticals commonly used in cancer treatment (I-131, TC-99, F-18), manufacture of Cosmetic products, manufacture of Ayurvedic drugs and manufacture or Assembling of medical devices.

Table 7.1: Manufacture of Pharmaceutical Products Sector Contribution to the GDP at Current and Constant Market Price (2015 - 2021)

Year	Current		Constant	
	Contribution Value (Rs. Mn)	Share of total Current GDP (%)	Contribution Value (Rs. Mn)	Share of total Constant GDP (%)
2015	5,010	0.046	3,326	0.038
2016	5,671	0.047	3,751	0.042
2017	6,536	0.049	4,236	0.045
2018	7,889	0.055	4,326	0.045
2019	7,080	0.047	3,827	0.039
2020	7,774	0.052	4,213	0.044
2021	9,205	0.055	4,334	0.044

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 7.1: The Contribution of the Pharmaceutical Products Industry sector to the share of the manufacturing industry to the GDP

Table 7.2: Manufacturing Establishments and Number of Persons Engaged of Pharmaceutical 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	69	764	21	2,021
2016	50	736	34	3,275
2017	74	842	25	3,146
2018	63	776	20	2,982
2019	68	637	18	2,825

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

Table 7.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Pharmaceutical Products (2015) - Establishments with 5 or more persons engaged

2015								
Size	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	28	196	176	42,288,712	173,624,902	88,697,163	84,927,738	5,113,111
10 to 99	59	1,595	1,544	433,995,128	3,301,326,746	2,124,963,513	1,176,363,233	132,924,822
100 & above	3	993	979	480,248,748	6,357,893,996	1,940,318,031	4,417,575,965	196,845,464
Group total	90	2,784	2,699	956,532,588	9,832,845,644	4,153,978,707	5,678,866,936	334,883,397

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

Table 7.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Pharmaceutical Products (2016) - Establishments with 5 or more persons engaged

2016								
Size	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	9	73	63	17,262,000	78,437,350	37,919,684	40,517,666	-
10 to 99	71	2,676	2,546	466,678,565	4,042,684,190	1,928,999,568	2,113,684,621	247,918,246
100 & above	4	1,262	1,250	675,348,972	6,711,491,223	2,666,798,275	4,044,692,949	433,397,579
Group total	84	4,011	3,859	1,159,289,537	10,832,612,763	4,633,717,527	6,198,895,236	681,315,825

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

Table 7.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Pharmaceutical Products (2017) - Establishments with 5 or more persons engaged

2017								
Size	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	35	220	153	34,019,409	136,572,045	71,836,961	64,735,085	-
10 to 99	55	1,553	1,486	298,546,377	2,172,436,882	841,318,508	1,331,118,374	12,754,013
100 & above	9	2,215	2,203	1,009,067,764	9,588,379,742	4,018,380,477	5,569,999,266	687,960,487
Group total	99	3,988	3,842	1,341,633,550	11,897,388,669	4,931,535,946	6,965,852,725	700,714,500

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

Table 7.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Pharmaceutical Products (2018) - Establishments with 5 or more persons engaged

2018								
Size	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	23	153	96	26,713,742	109,582,634	57,237,086	52,345,548	-
10 to 99	49	1,110	1,034	254,279,013	1,044,858,956	455,431,752	589,427,204	12,175,152
100 & above	11	2,495	2,478	1,232,277,365	11,080,050,553	4,851,949,305	6,228,101,247	4,576,181,244
Group total	83	3,758	3,608	1,513,270,120	12,234,492,143	5,364,618,143	6,869,873,999	4,588,356,396

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

Table 7.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Pharmaceutical Products (2019) - Establishments with 5 or more persons engaged

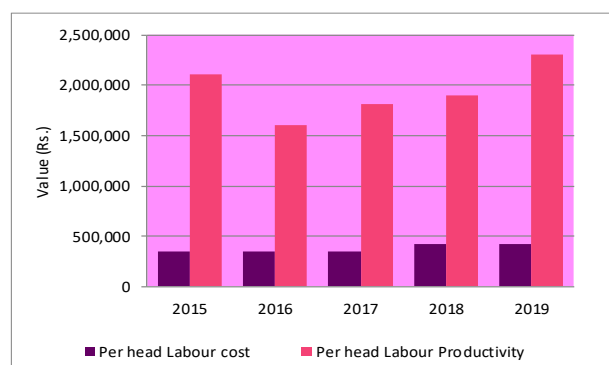
2019								
Size	No of Establishments	Persons engaged	Employees	Salary & Wages	Output (Rs)	Intermediate consumptions (Rs)	Value added (Rs)	Gross addition to fixed assets (Rs)
less than 10	44	266	156	36,001,867	120,117,831	47,739,427	72,378,404	14,829
10 to 99	36	977	926	223,233,197	677,293,933	290,299,540	386,994,393	3,250,253
100 & above	6	2,219	2,207	1,224,741,560	12,836,724,024	5,718,337,441	7,118,386,586	760,306,953
Group total	86	3,462	3,289	1,483,976,624	13,634,135,788	6,056,376,408	7,577,759,383	763,572,035

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

Table 7.8: Manufacturing of Pharmaceutical Products Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	354,403	2,104,063	5.94
2016	349,202	1,606,348	4.60
2017	349,202	1,813,080	5.19
2018	419,421	1,904,067	4.54
2019	419,421	2,303,971	5.49

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



Source : Department of Census and Statistics

Figure 7.2: Manufacturing of Pharmaceutical Products Per Head Labour Productivity

Table 7.9: Value of Output & Output Components Classified by Basic Pharmaceutical Products 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	7,491,056,195	7,393,435,016	84,578,858	13,042,321
2016	10,482,138,881	9,774,314,753	417,489,834	290,334,294
2017	11,229,193,326	10,807,833,678	407,919,168	13,440,480
2018	11,275,638,945	13,021,320,171	30,983,744	(1,776,664,970)
2019	13,139,873,754	14,207,112,727	82,820,949	(1,150,059,921)

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

Table 7.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Basic Pharmaceutical Products Industry

Year	Intermediate consumption (Rs)	Raw materials consumed (Rs)	Cost of industrial services done by others & other payments (Rs)	Electricity & fuel consumed (Rs)
2015	2,415,724,833	1,764,653,641	580,474,848	70,596,344
2016	4,469,649,587	3,581,137,376	729,165,628	159,346,583
2017	4,551,757,304	3,777,136,017	593,270,529	181,350,758
2018	4,957,095,662	4,110,118,895	674,414,579	172,562,188
2019	5,854,392,396	4,778,478,435	925,604,173	150,309,788

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

Table 7.11: Employment by Nature of Employment & Gender Classified by Industry Division of Basic Pharmaceutical Products - 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	36	11	-	-	563	652	546	213	1,145	876
2016	21	4	3	-	674	1,120	1,019	435	1,717	1,559
2017	23	2	3	-	858	947	871	443	1,754	1,392
2018	38	4	5	-	876	594	912	545	1,839	1,143
2019	29	3	-	-	891	685	810	406	1,730	1,095

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

Table 7.12: Economic Indicators of Industrial Activity Classified by Class Industry of Basic Pharmaceutical Products (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	
	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons
2015	3,065,189	3,707,113	1.347	3.101	2.514	3.757	789,973	2,511,638	0.347	2.101	0.648	2.546
2016	476,187	3,200,653	2.136	2.345	1.185	3.099	253,269	1,835,875	1.136	1.345	0.631	1.778
2017	793,535	3,569,356	1.759	2.467	1.123	2.210	342,518	1,614,755	0.759	1.467	0.485	1.314
2018	1,235,636	3,781,234	2.353	2.275	1.384	1.216	710,478	2,118,894	1.353	1.275	0.796	0.681
2019	776,007	4,651,398	2.447	2.244	0.881	2.576	458,886	2,578,995	1.447	1.244	0.521	1.428

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

Table 7.13: Categories of Employees by Nature of Employment Classified by Industry of Basic Pharmaceutical Products

(Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	1,974	816	399
2016	3,247	1,428	366
2017	3,118	1,185	620
2018	2,935	943	527
2019	2,792	993	583

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

Table 7.14: Number of Pharmaceutical Products Manufacturing Industries and Engaged Persons in Sri Lanka (2013/14 Economic Census)

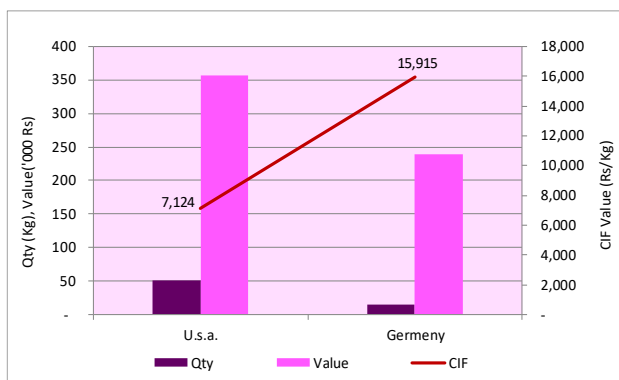
Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of medicament (western)	8	16	4	39	4	169	3	986
Manufacture of indigenous/ ayurvedic medicaments, botanical products	273	439	41	381	17	980	2	1198
Manufacture of medical impregnated wadding, bandages, dressing etc.	5	12	1	7	-	-	-	-
Manufacture of other pharmaceuticals, medicinal, chemical and botanical products n.e.c.	11	17	9	83	-	-	1	700
Total	297	484	55	510	21	1149	6	2884

Source: Department of Census and Statistics

Table 7.15: Pharmaceutical Products Imports (2019-2021)

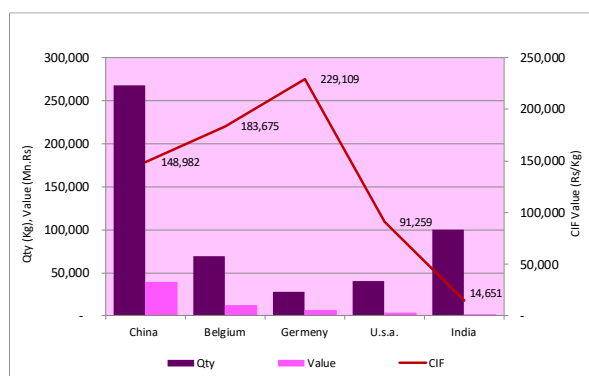
Description	2019		2020		2021	
	QTY (MT)	Value (Rs. Mn)	QTY (MT)	Value (Rs. Mn)	QTY (MT)	Value (Rs. Mn)
Glands and other organs for organ therapeutic uses, dried, whether or not powdered; extracts of glands or other organs or of their secretions for organo-therapeutic uses; heparin and its salts; other human or animal substances prepared for therapeutic or prophylactic uses, not elsewhere specified or included.	0.06	0.575,767	0.079	0.67	0.065	0.59
Human blood; animal blood prepared for therapeutic, prophylactic or diagnostic uses; antisera, other blood fractions and immunological products, whether or not modified or obtained by means of biotechnological processes; vaccines, toxins, cultures of micro-organisms (excluding yeasts) and similar products.	227	7,470	288	10,540	606	68,075
Medicaments (excluding goods of heading 30.02, 30.05 or 30.06) consisting of two or more constituents which have been mixed together for therapeutic or prophylactic uses, not put up in measured doses or in forms or packing's for retail sale.	196	352	286	570	605	1,358
Medicaments (excluding goods of heading 30.02, 30.05 or 30.06) consisting of mixed or unmixed products for therapeutic or prophylactic uses, put up in measured doses	19,810	69,392	907	932	15,297	78,037
Wadding, gauze, bandages and similar articles	514	899	45,293	19,214	453	850
Pharmaceutical goods specified in Note 4 to this chapter	244	2,315	274	2,502	248	2,823
Grand Total	20,994	80,430	47,051	33,762	17,212	151,146

Source: Sri Lanka Customs



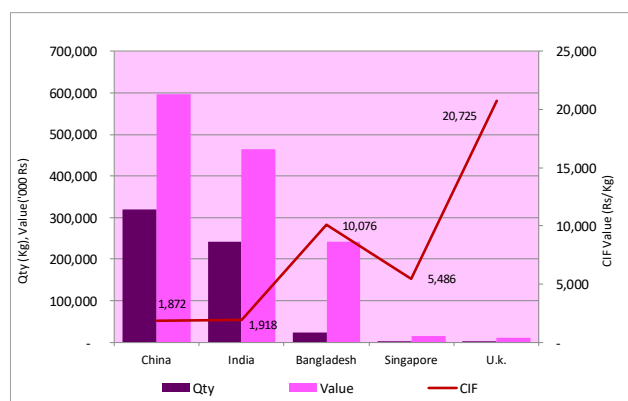
Source : Sri Lanka Customs

Figure 7.3: Major Import Countries of Pharmaceutical Product (Glands and other organs for organ therapeutic uses, dried, whether or not powdered)-2021



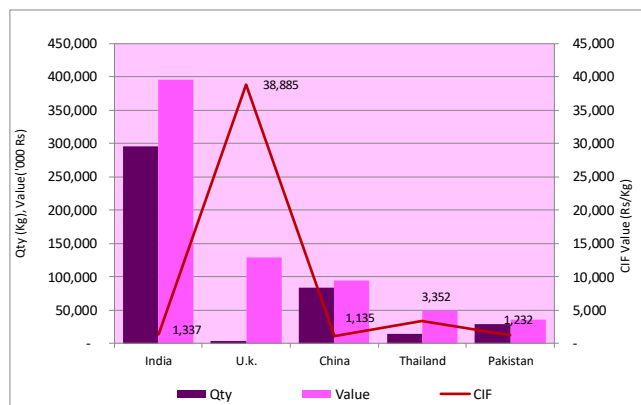
Source : Sri Lanka Customs

Figure 7.4: Major Import Countries of Pharmaceutical Product (Human blood; animal blood prepared for therapeutic, prophylactic or diagnostic uses)-2021



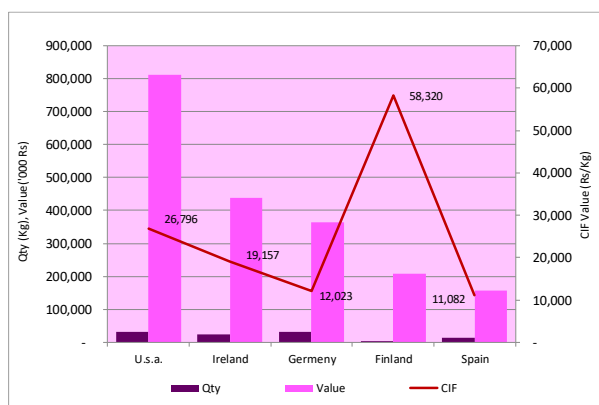
Source : Sri Lanka Customs

Figure 7.5: Major Import Countries of Medicaments (excluding goods of heading 30.02, 30.05 or 30.06) consisting of two or more constituents which have been mixed-2021



Source : Sri Lanka Customs

Figure 7.6: Major Import Countries of Wadding, gauze, bandages and similar articles-2021



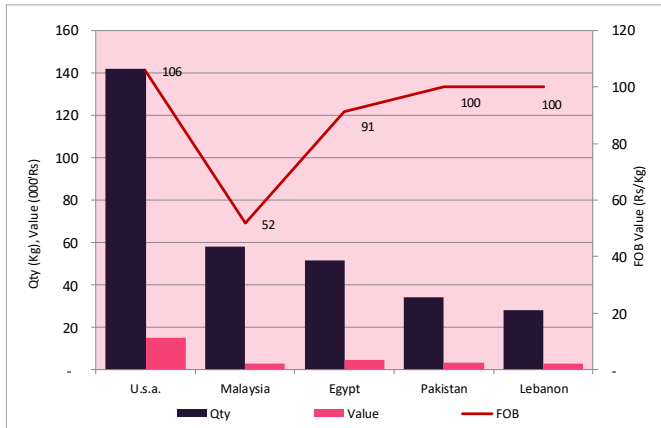
Source : Sri Lanka Customs

Figure 7.7: Major Import Countries of Pharmaceutical goods specified in Note 4 to this chapter-2021

Table 7.16: Pharmaceutical Product Exports (2019-2021)

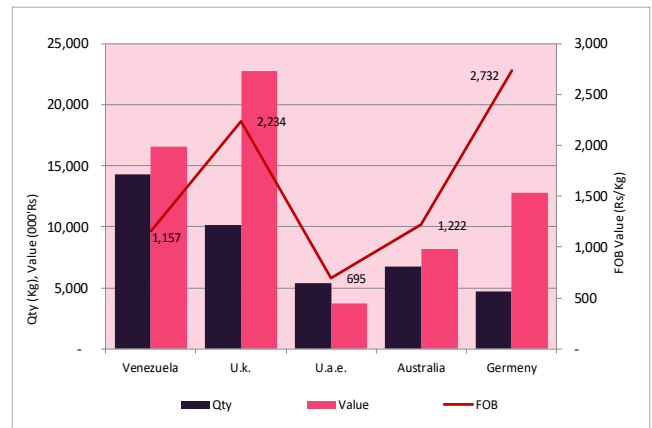
Description	2019		2020		2021	
	QTY (MT)	Value (Rs. Mn)	QTY (MT)	Value (Rs. Mn)	QTY (MT)	Value (Rs. Mn)
Glands and other organs for organ therapeutic uses, dried, whether or not powdered; extracts of glands or other organs or of their secretions for organo-therapeutic uses; heparin and its salts; other human or animal substances prepared for therapeutic or prophylactic uses, not elsewhere specified or included.	0.92	0.11	0.19	0.14	0.38	0.34
Human blood; animal blood prepared for therapeutic, prophylactic or diagnostic uses; antisera, other blood fractions and immunological products, whether or not modified or obtained by means of biotechnological processes; vaccines, toxins, cultures of micro-organisms (excluding yeasts) and similar products.	125	741	39	253	46	310
Medicaments (excluding goods of heading 30.02, 30.05 or 30.06) consisting of two or more constituents which have been mixed together for therapeutic or prophylactic uses, not put up in measured doses or in forms or packing's for retail sale.	78	121	48	64	53	89
Medicaments (excluding goods of heading 30.02, 30.05 or 30.06) consisting of mixed or unmixed products for therapeutic or prophylactic uses, put up in measured doses (including those in the form of transdermal administration systems) or in forms or packing for retail sale.	586	1,456	232	630	307	876
Wadding, gauze, bandages and similar articles	191	443	91	213	81	207
Pharmaceutical goods specified in Note 4 to this chapter	0.99	6	0.63	5	0.22	3
Grand Total	982	2,769	413,096	1,167	489	1,487

Source: Sri Lanka Customs



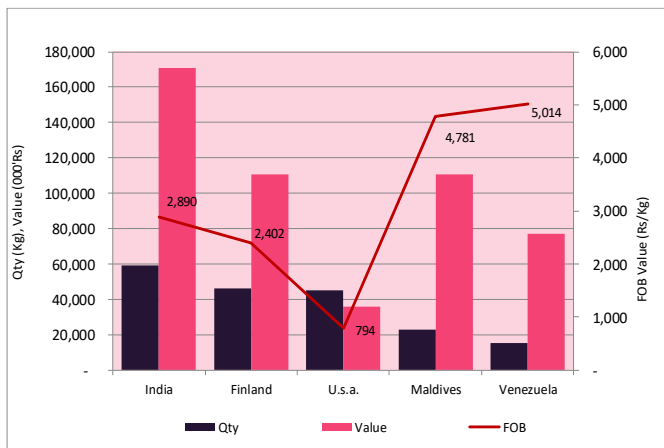
Source : Sri Lanka Customs

Figure 7.8: Major Export Countries of Pharmaceutical Product (Glands and other organs for organ therapeutic uses,



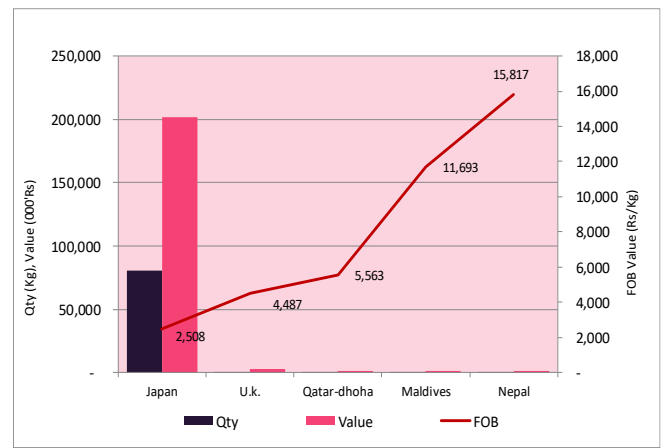
Source : Sri Lanka Customs

Figure 7.9: Major Export Countries of Pharmaceutical Product (Human blood; animal blood prepared for therapeutic, prophylactic or diagnostic uses)-2021



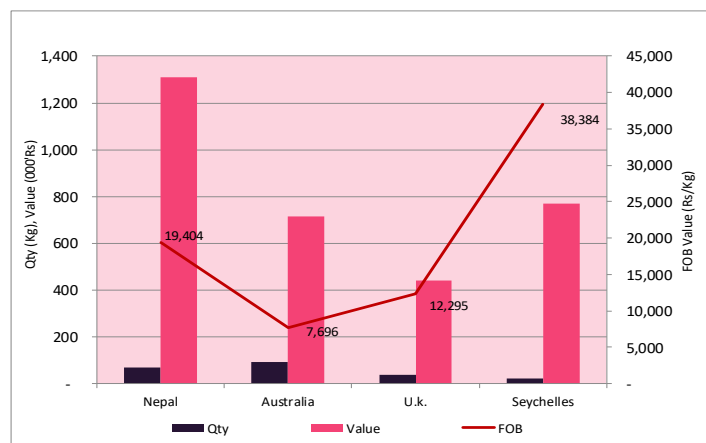
Source : Sri Lanka Customs

Figure 7.10: Major Export Countries of Medicaments (excluding goods of heading 30.02, 30.05 or 30.06) consisting of two or more constituents which have been mixed together-



Source : Sri Lanka Customs

Figure 7.11: Major Export Countries of Wadding, gauze, bandages and similar articles-2021



Source : Sri Lanka Customs

Figure 7.12: Major Export Countries of Pharmaceutical goods specified in Note 4 to this chapter-2021



8. COSMETIC PRODUCTS INDUSTRY

Overview

Cosmetic sector involves production of different types of cosmetics under the segments including skin care, hair care, oral care, baby care, colour cosmetics, perfumes & colognes, and hygiene products. It is estimated that about 65% of cosmetics are produced locally and the balance 35% are imported.

Packaging and marketing play a major role in the success of the cosmetics business. Cosmetics manufacturers and importers utilize about 25% of the total advertising air time on TV, Radio and Social media for the promotion of their products in Sri Lanka, thereby being the largest advertiser among all the industry and service sectors in the country. Cosmetics are mostly distributed through standard retail outlets (about 75%) and super market outlets (about 25%).

Cosmetics market in Sri Lanka was estimated to be about Rs. 65 billion (USD 325 million) in 2021. After the depreciation of Sri Lankan Rupee in March 2022, prices of many cosmetics increased and consumption of certain cosmetics have significantly reduced. Based on the above economic conditions, cosmetics market in Sri Lanka has reduced in USD terms but increased in Rupee terms. By end of 2022, cosmetics market in Sri Lanka was estimated to be about Rs. 90 billion even after a volume reduction of about 23%.

There are over 30 companies manufacturing cosmetics in Sri Lanka and many of them are registered under Ministry of Industries. Many of those cosmetics manufacturers are engaged in multiple sub sectors. The sales revenue of domestic production of cosmetics in the year 2022 was estimated to be about Rs. 61.5 billion, including exports of about Rs. 3.3 billion. In 2022, about Rs. 32 billion worth of cosmetics have been imported.

Table 8.1: Cosmetic Product Imports- (2019-2021)

Description 1	Description 2	2019		2020		2021	
		Quantity (Kg)	Value (Rs.)	Quantity (Kg)	Value (Rs.)	Quantity (Kg)	Value (Rs.)
Disinfectants	Liquid and Gel Sanitizers	664,324	256,570,321	1,009,177	490,560,169	1,635,092	688,275,652
Soap and organic surface-active products and preparations, in the form of bars, cakes, moulded pieces or shapes, and paper, wadding, felt and nonwovens, impregnated, coated or covered with soap or detergent :	Misumi Beauty Soap, Baby Soap, Handmade soap	275,034	165,171,761	287,506	116,833,366	231,417	95,619,114
Other	Laundry soap	5,114	6,609,417	12,582	17,972,999	427	1,551,374
Organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale, whether or not containing soap	All Face Wash, Body Wash, Cleansers, Scrubs, Face Packs	298,303	283,237,776	138,097	119,546,864	85,664	94,939,233
Soap; organic surface-active products and preparations for use as soap, in the form of bars, cakes, moulded pieces or shapes, whether or not containing soap; organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale, whether or not containing soap; paper, wadding, felt and nonwovens, impregnated, coated or covered with soap or detergent.	Hand Wash	7,603	4,464,122	2,648	2,089,749	2,046	5,401,091
Other: Washing preparations	Nappy Wash	1,489,285	525,352,965	1,153,960	360,441,583	1,544,154	653,421,778
Manicure or pedicure preparations	Nail Polish Remover	21,352	66,661,246	19,880	54,549,508	25,315	59,077,032
Other	All Creams, Lotions, Toners, Serums, body oils	656,599	1,560,372,920	505,592	985,149,338	518,566	1,375,695,764
Shampoos	All Shampoo, Conditioners	502,863	366,345,985	492,815	386,841,015	701,302	624,025,029
Other	Hair Gel, Hair Oil, Hair Tonic	512,392	753,655,383	444,521	605,174,821	963,056	1,270,375,261
Perfumes	Perfumes	430,397	1,171,198,999	341,308	571,644,152	114,805	234,125,009
Other	Baby cologne	684,230	281,812,924	663,320	255,726,000	783,941	473,500,556
Other colognes containing alcohol not less than 50% and not more than 90% by v/v	Other colognes	59,952	77,405,553	49,362	52,357,751	63,414	76,275,042
Powders, whether or not compressed	Baby Talc	63,973	112,356,926	65,271	61,793,891	49,349	75,840,622
Wadding of textile materials and articles thereof; textile fibres, not exceeding 5 mm in length (flock), textile dust and mill neps.	Cotton Bud	115,806	114,751,522	231,901	166,502,298	196,851	279,832,802
Pre-shave, shaving or after-shave preparations	Shaving Cream	76,868	66,320,274	34,452	25,946,469	53,830	56,792,674
Total		5,864,094	5,812,288,094	5,452,391	4,273,129,973	6,969,229	6,064,748,033

Source: Sri Lanka Customs

Table 8.2: Cosmetic Product Exports - (2019-2021)

Description 1	Description 2	2019		2020		2021	
		Quantity (kg)	Value (Rs.)	Quantity (kg)	Value (Rs.)	Quantity (kg)	Value (Rs.)
Disinfectants	Liquid and Gel Sanitizers	11,733	6,301,658	16,593	17,916,105	17,056	16,178,885
Soap and organic surface-active products and preparations, in the form of bars, cakes, moulded pieces or shapes, and paper, wadding, felt and nonwovens, impregnated, coated or covered with soap or detergent :	Misumi Beauty Soap, Baby Soap, Handmade soap	1,115	741,450	10,436	4,904,274	4,435	3,305,246
Other	Laundry soap	-	-	146	224,822	37	90,817
Organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale, whether or not containing soap	All Face Wash, Body Wash, Cleansers, Scrubs, Face Packs	41,677	46,384,727	61,006	61,006	80,330	97,120,606
Soap; organic surface-active products and preparations for use as soap, in the form of bars, cakes, moulded pieces or shapes, whether or not containing soap; organic surface-active products and preparations for washing the skin, in the form of liquid or cream and put up for retail sale, whether or not containing soap; paper, wadding, felt and nonwovens, impregnated, coated or covered with soap or detergent.	Hand Wash	43,215	41,244,881	61,270	45,324,422	42,564	40,447,824
Other: Washing preparations	Nappy Wash	6,562,352	2,505,997,471	1,946,823	760,854,603	1,155,063	490,689,387
Manicure or pedicure preparations	Nail Polish Remover	7,370	20,721,129	3,166	19,397,396	3,578	17,450,111
Other	All Creams, Lotions, Toners, Serums, body oils	288,473	692,918,531	360,351	597,346,749	383,844	829,077,498
Shampoos	All Shampoo, Conditioners	543,334	339,095,660	474,185	314,550,418	393,591	226,097,323
Other	Hair Gel, Hair Oil, Hair Tonic	661,458	758,139,720	483,473	582,393,995	750,889	815,697,479
Perfumes	Perfumes	85,408	260,056,070	10,690	19,159,036	18,691	63,426,134
Other	Baby cologne	1,319	1,605,220	8,712	9,021,143	5,837	8,530,252
Other colognes containing alcohol not less than 50% and not more than 90% by v/v	Other colognes	302	433,451	122	308,359	-	-
Powders, whether or not compressed	Baby Talc	8,065	18,352,000	1,253	4,735,393	2,078	4,801,343
Wadding of textile materials and articles thereof; textile fibres, not exceeding 5 mm in length (flock), textile dust and mill neps.	Cotton Bud	559	969,528	51	115,677	696	1,056,129
Pre-shave, shaving or after-shave preparations	Shaving Cream	22,014	10,353,290	11,446	5,950,831	797	1,609,999
Total		8,278,394	4,703,314,786	3,449,723	2,382,264,229	2,859,486	2,615,579,033

Source: Sri Lanka Customs



9. RUBBER AND PLASTIC PRODUCTS INDUSTRY

Overview

The Sri Lankan rubber industry consists of three main sectors namely the plantation industry that grows and harvest latex, the rubber products manufacturing industry and the rubber wood based industry. The value-added rubber products manufacturing sector has recently emerged as the key driving force in the industrial based development of the economy.

The manufactured raw natural rubber falls under types and varieties, out of which the main grades are Ribbed smoked sheets (RSS) rubber, crepe rubber, Technically specified rubber (TSR), and Latex concentrate.

Sri Lanka pride itself in manufacturing a number of value-added rubber products by processing raw rubber. These range from extrusion products like rubber bands, beadings, latex products such as medical, industrial and household gloves, industrial products like hoses, auto parts, industrial components, tyres, tubes, automotive tyres and general rubber products like floor mats, carpets, sports goods, footwear, hot water bottles and related components.

Today, Sri Lanka is the largest solid tyre manufacturer in the world catering to nearly 25% of the global demand. In addition, the country also produces pneumatic and semi-pneumatic tyres, tubes, and retreading materials for the global market. Produced under environmentally sustainable manufacturing guidelines, EU REACH regulation (EC) No 1907/2006, and global quality standard, country's tyre sector accounted for more than 60% share in the total value of rubber exports from Sri Lanka while solid tyres and new pneumatic tyres accounted for 61% and 38% of the export value in the local tyre sector, respectively.

The country is the fifth largest exporter of latex gloves in the world and also exports other rubber products including flooring mats, industrial components automotive components, rubber bands, sealing rings, straps, hoses, and hot water bottles.

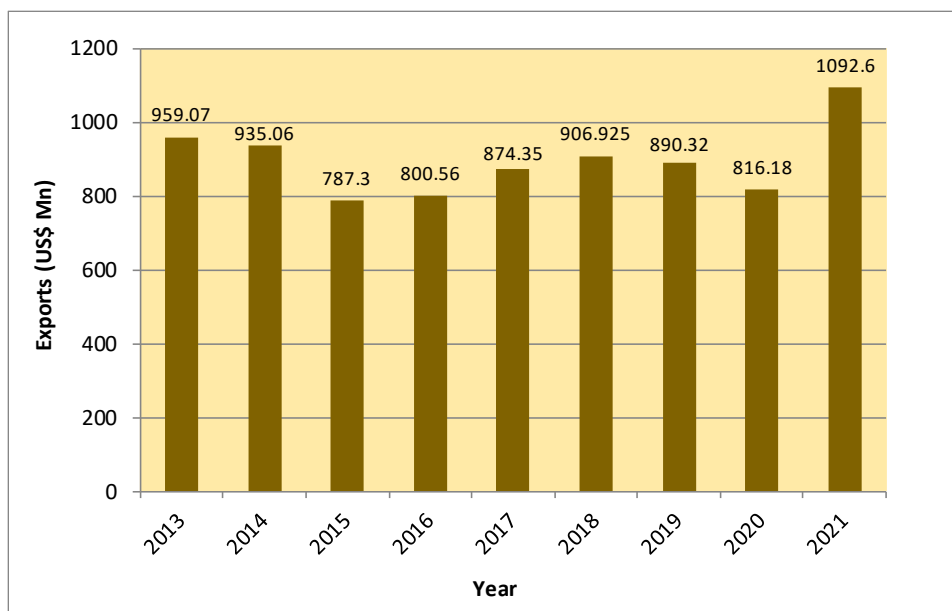
The Rubber Product industry is the fifth largest export earning industry accounting for 7.2 % of the total national exports and has established a reputation for its quality and reliability internationally. The rubber products exports show a 34% growth in 2021 when compared to 2020. Average growth rate is approximately 4.5%. Compared to last three years. Major markets for Rubber products are USA, Germany, Italy, Belgium, France and UK.

Plastic processing has been a flourishing industry in Sri Lanka for over 45 years. Currently, Sri Lanka has over 400 companies engaged in plastic processing. The capacity of the local plastic processing industry at present is nearly 140,000 MT per annum with an annual average growth rate of around 10% – 12 %. Generally, Plastic exports could be divided into two forms, i.e primary forms of plastic exports and finished products of exports. The USA has been the dominant buyer of plastic products of Sri Lanka with nearly 40% of the total exports going to the USA market. Products such as sacks and bags, articles of apparel /clothing accessories, and cellulose are manufactured through plastic processing and exported directly and indirectly.

Plastic Processing Technologies Available in Sri Lanka are Pipe and Profile extrusion, Cast Film Extrusion, Blown Film Extrusion, Injection Molding, Extrusion blow molding, Rotational Molding and EPS Molding. Other sub – process Used in Sri Lanka related to Plastic Processing are Laminating, Printing, Weaving and Thermoforming. Water Supply and sanitation, Telecommunication, Construction, Packaging, Automobile, Medical and Electronics & Consumer durables are the major Allied Industries.

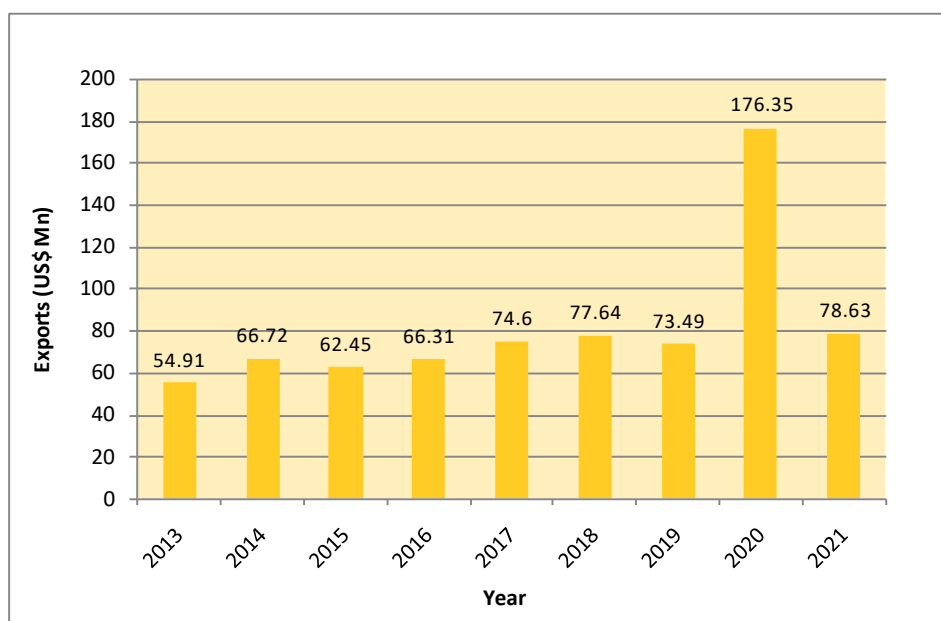
Total export earnings from the Rubber sector amounts to at USD 1,050 million by the end of 2021. The Sector Contributed 8.92% to total merchandise exports in year 2021. This is while receiving USD 321.73 million from USA, the largest buyer of the sector. Germany, Canada, Belgium, Italy, France, UK, India and Australia are other major export destinations. Sector contribution to GDP stands at approximately 0.8%.

Total export earnings from the Plastic processing sector amounts to at USD 78.63 million by the end of 2021. The Sector Contributed 0.64% to total merchandise exports in year 2021. This is while receiving USD 16.78 million from USA, the largest buyer of the sector. Bangladesh, India, Maldives, France, UK, Kenya and China are other major export destinations.



Source; Export Development Board

Figure 9.1: Exports Value of Rubber and Rubber based Products Industry



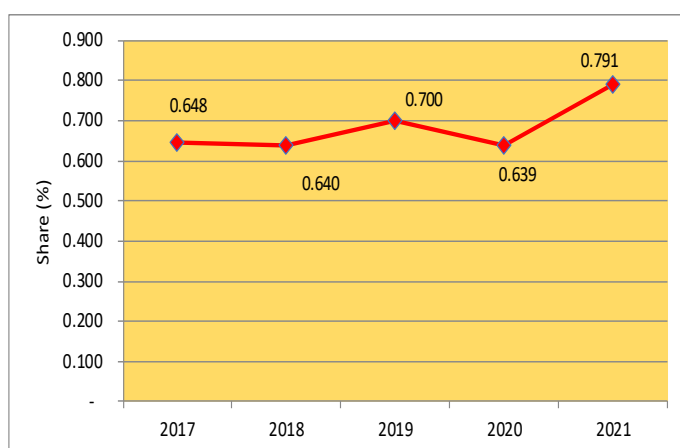
Source; Export Development Board

Figure 9.2: Exports Value of Plastic Products Industry

Table 9.1: Manufacture of Rubber And Plastic Product Contributions to the GDP at Current and Constant Market Price (2017 - 2021)

Year	Current market price		Constant market price	
	contribution Value (Rs. Mn)	Share (%) of Total Current GDP	contribution Value (Rs. Mn)	Share (%) of Total Constant GDP
2017	86,306	0.648	86,202	0.921
2018	91,498	0.640	85,933	0.889
2019	105,034	0.700	81,070	0.820
2020	95,989	0.639	68,334	0.717
2021	133,031	0.791	82,013	0.830

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 9.3: The Contribution of the Rubber & Plastic sector to the share of the manufacturing industry to the GDP

Table 9.2: Manufacturing Establishments and Number of Persons Engaged of Rubber and Plastic Products 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	264	3,204	243	37,699
2016	207	1,710	212	37,379
2017	320	2,419	225	35,375
2018	278	3,578	231	35,429
2019	436	3,813	162	41,044

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

Table 9.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Rubber and Plastic Products Industry (2015) (Establishments with 5 or more persons engaged)

2015								
Size	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	99	628	547	188,076,821	550,609,114	144,655,577	405,943,537	7,199,276
10 to 99	339	10,011	9,659	4,597,837,841	61,111,462,465	31,868,657,870	29,242,804,595	7,332,471,150
100 & above	69	30,264	30,208	11,897,533,010	98,003,145,609	47,232,781,253	50,770,364,356	8,037,803,489
Group total	507	40,903	40,413	16,683,447,672	159,665,217,188	79,246,104,699	80,419,112,488	15,377,473,915

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

Table 9.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Rubber and Plastic Products Industry (2016) (Establishments with 5 or more persons engaged)

2016								
Size	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	175	1,254	939	155,330,413	1,589,348,100	726,436,628	862,911,472	1,125,267
10 to 99	121	4,388	4,331	854,296,766	10,981,923,266	4,994,019,194	5,987,904,071	232,686,899
100 & above	123	33,447	33,326	13,294,498,530	148,812,260,904	77,820,511,282	70,991,749,621	8,124,894,632
Group total	419	39,089	38,596	14,304,125,709	161,383,532,270	83,540,967,104	77,842,565,164	8,358,706,798

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

Table 9.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged size of Rubber and Plastic Products Industry (2017) (Establishments with 5 or more persons engaged)

2017								
Size	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	257	1,399	525	108,945,132	1,032,177,875	550,569,663	481,608,212	65,000
10 to 99	171	4,363	4,285	1,133,377,081	5,817,154,111	3,283,774,294	2,533,379,817	329,530,171
100 & above	117	32,032	31,919	12,523,751,161	175,968,023,174	92,102,715,817	83,865,307,356	5,274,938,229
Group total	545	37,794	36,729	13,766,073,374	182,817,355,160	95,937,059,774	86,880,295,385	5,604,533,400

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

Table 9.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Rubber and Plastic Products Industry (2018) (Establishments with 5 or more persons engaged)

2018								
Size	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	106	625	414	122,177,875	714,807,069	380,919,280	333,887,788	6,306,706
10 to 99	292	8,197	8,043	3,080,037,046	27,436,772,658	15,128,402,761	12,308,369,897	607,557,570
100 & above	111	30,185	30,061	13,083,686,624	167,356,895,581	89,894,785,389	77,462,110,192	6,516,899,727
Group total	509	39,007	38,518	16,285,901,545	195,508,475,308	105,404,107,430	90,104,367,877	7,130,764,003

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

Table 9.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Rubber and Plastic Products Industry (2019) (Establishments with 5 or more persons engaged)

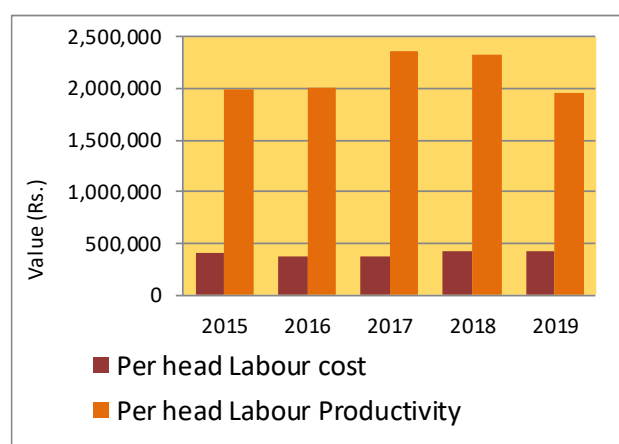
2019								
Size	No of Establishments	Persons engaged	Employees	Salary & Wages	Output (Rs)	Intermediate consumptions (Rs)	Value added (Rs)	Gross addition to fixed assets (Rs)
less than 10	269	1,621	1,293	144,622,955	1,939,913,649	1,559,307,797	380,605,853	130,000
10 to 99	227	4,430	4,155	1,590,716,625	12,810,718,945	6,572,394,756	6,238,324,189	1,628,425,562
100 & above	102	38,806	38,712	16,831,354,422	182,459,245,354	102,657,699,539	79,801,545,815	8,783,779,995
Group total	598	44,857	44,160	18,566,694,002	197,209,877,948	110,789,402,092	86,420,475,857	10,412,335,557

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

Table 9.8: Manufacturing of Rubber and Plastic Products Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	412,824	1,989,932	4.82
2016	370,612	2,016,856	5.44
2017	374,801	2,365,441	6.31
2018	422,813	2,339,280	5.53
2019	420,441	1,956,985	4.65

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



Source : Department of Census and Statistics

Figure 9.4: Manufacturing of Rubber and Plastic Products Per Head Labour Productivity

Table 9.9: Value of Output & Output Components Classified by Industry of Rubber and Plastic- (Establishments 25 or more engaged)

Table 9.9.1: Rubber Product

Year	Output (Rs)	Shipped (Rs)/ products moved of the establishment (Rs)	Change in Stocks (Rs)	Industrial services & other revenue (Rs)
2015	100,485,269,397	83,037,955,862	1,900,589,008	15,546,724,527
2016	121,228,829,289	105,059,022,442	(365,730,898)	16,535,537,745
2017	147,090,117,110	136,699,010,691	151,442,522	10,239,663,897
2018	141,934,274,508	129,082,713,766	1,368,370,508	11,483,190,234
2019	147,702,421,003	134,865,709,647	1,945,448,836	10,891,262,520

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

Table 9.9.2: Plastic Product

Year	Output (Rs)	Shipped (Rs)/ products moved of the establishment (Rs)	Change in Stocks (Rs)	Industrial services & other revenue (Rs)
2015	56,217,859,367	53,651,309,798	244,522,820	2,322,026,749
2016	38,093,145,912	37,466,255,339	120,281,939	506,608,634
2017	33,500,467,352	29,192,721,583	(360,282,858)	4,668,028,627
2018	44,857,804,888	40,176,782,644	(724,753,119)	5,405,775,363
2019	41,631,922,168	37,125,326,454	(530,570,696)	5,037,166,410

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

Table 9.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Industry of Rubber and Plastic (Establishments with 25 or more persons engaged)

Table 9.10.1: Rubber Product

Year	Intermediate consumption (Rs)	Raw materials consumed (Rs)	Cost of industrial services done by others & other payments (Rs)	Electricity & fuel consumed (Rs)
2015	46,956,976,217	36,003,197,752	7,331,849,414	3,621,929,051
2016	58,806,864,422	46,393,951,446	7,854,455,239	4,558,457,738
2017	75,407,248,999	65,793,219,706	6,052,000,747	3,562,028,546
2018	73,350,785,555	62,550,606,794	6,650,704,504	4,149,474,257
2019	82,221,529,060	68,866,741,144	8,829,566,088	4,525,221,828

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

Table 9.10.2: Plastic Product

Year	Intermediate consumption (Rs)	Raw materials consumed (Rs)	Cost of industrial services done by others & other payments (Rs)	Electricity & fuel consumed (Rs)
2015	31,136,565,954	26,884,213,014	2,297,233,654	1,955,119,285
2016	23,715,343,020	20,307,354,304	1,787,975,073	1,620,013,643
2017	19,306,140,642	16,375,120,944	1,553,442,351	1,377,577,347
2018	25,914,315,079	21,564,071,480	2,550,396,753	1,799,846,846
2019	23,498,645,414	20,315,522,804	1,681,013,371	1,502,109,239

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

Table 9.11: Employment by Nature of Employment & Gender Classified by Industry Division of Rubber and Plastic (Establishment with 25 or more persons engaged)

Table 9.11.1: Rubber Product

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	217	5	2	-	14,241	9,700	4,633	1,273	19,094	10,978
2016	99	13	-	23	13,049	8,489	4,675	2,183	17,824	10,708
2017	75	15	-	-	12,195	8,511	4,222	1,751	16,492	10,277
2018	68	17	-	-	12,578	7,637	4,707	1,448	17,360	9,101
2019	65	39	-	-	18,477	9,681	4,984	1,576	23,526	11,295

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

Table 9.11.2: Plastic Product

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	111	50	-	-	3,497	1,649	1,658	662	5,266	2,361
2016	20	1	-	-	3,890	1,923	2,265	748	6,175	2,672
2017	30	13	6	3	3,671	2,390	1,598	895	5,305	3,301
2018	25	20	-	-	4,039	2,047	1,988	849	6,052	2,916
2019	22	13	-	-	3,025	1,088	1,544	531	4,591	1,632

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

Table 9.12: Economic indicators of Industrial Activity Classified by Industry Class of Rubber and Plastic**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	924,444	2.570	0.999	564,739	1.570	0.610
2016	1,205,589	2.024	1.831	609,823	1.024	0.926
2017	920,409	1.820	0.412	414,620	0.820	0.185
2018	2,436,108	1.420	2.129	720,344	0.420	0.629
2019	2,065,270	1.544	1.792	735,922	0.554	0.639

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

Table 9.13: Economic Indicators of Industrial Activity Classified by Industry Class of Rubber and Plastic Products (Establishments with 25 or more persons engaged)**Table 9.13.1: Rubber Product**

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	4,248,895	2.061	2.891	2,187,799	1.061	1.489
2017	5,494,876	1.951	4.319	1,272,390	0.951	2.105
2018	5,363,904	1.935	3.737	2,591,871	0.935	1.806
2019	4,241,684	1.796	3.310	1,880,465	0.796	1.468

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

Table 9.13.2: Plastic Product

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	4,305,839	1.606	1.356	1,625,188	0.606	0.512
2017	3,892,663	1.735	1.810	2,150,757	0.735	0.767
2018	5,001,985	1.731	1.749	2,112,343	0.731	0.739
2019	6,690,406	1.772	1.680	2,914,086	0.772	0.732

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

Table 9.14: Categories of Employees by Nature of Employment Classified by Rubber and Plastic Products industry (Establishments with 25 or more persons engaged)

Table 9.14.1: Rubber Product

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	29,847	15,026	8,915
2016	28,397	15,753	5,785
2017	26,679	16,101	4,605
2018	26,376	16,462	3,753
2019	34,718	21,731	6,427

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

Table 9.14.2: Plastic Product

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015			
2016			
2017			
2018			
2019			

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

Table 9.15: Number of Rubber and Plastic Manufacturing Industries and Engaged Persons in Sri Lanka
(2013/14 Economic Census)

Table 9.15.1: Rubber Product

Industry	Micro		Small		Medium		Large	
	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE	No. of Estab.	No. of PE	No. of Es-tab.	No. of PE
Manufacture of pneumatic rubber tyres	-	-	6	85	9	1042	12	6604
Retreading and rebuilding of rubber tyres	17	31	17	170	6	399	1	345
Manufacture of solid tyres	2	4	-	-	-	-	4	2006
Manufacture of rubber plates, sheets, strips, rods etc.	1339	1784	142	1358	47	2472	7	2265
Manufacture of rubber pipes, hoses, rings, fittings, seals	33	57	13	159	1	60	2	742
Manufacture of rubberized yarns and fabrics, rubber thread & rope	2	8	1	15	1	38	-	-
Manufacture of inflatable rubber mattresses, rubber hygienic articles: contraceptives, teats etc.	2	2	1	19	-	-	-	-
Manufacture of rubber bathing caps & aprons, wet suits, diving suits and other rubber based garments	5	11	2	12	-	-	1	287
Manufacture of rubber based garments	-	-	-	-	-	-	1	390
Manufacture of inflatable rubber balloons	1	4	5	45	1	30	1	257
Manufacture of hard rubber products	2	2	4	29	1	35	-	-
Manufacture of other rubber products n.e.c.	106	180	42	436	22	1882	10	4128
Total	1,509	2,083	233	2,328	88	5,958	39	17,024

Source : Department of Census and Statistics

Table 9.15.2.: Plastic Product

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 Es-tab.	No. of PE
Manufacture of semi manufactures of plastic products; such as plates, sheets, blocks, film, foil etc.	3	9	1	5	-	-	-	-
Manufacture of finished plastic products; such as tubes, pipes, hoses, pipe fittings (Rings, seals etc.)	39	84	21	227	8	666	1	413
Manufacture of plastic articles for packing goods (such as containers, boxes, bottles, bags etc.)	75	154	29	317	19	1250	3	720
Manufacture of builder's plastic ware (such as doors, windows, frames, shutters, tanks, reservoirs, sanitary ware	5	9	10	117	3	218	-	-
Manufacture of plastic tableware, kitchenware, toilet articles etc.	27	68	9	71	4	146	3	991
Manufacture of plastic products such as school supplies, conveyor belts, combs, hair curlers, novelties etc.	47	70	5	42	1	30	1	450
Manufacture of Fibre Glass Products	197	290	11	92	1	30	-	-
Manufacture of Adhesive Tapes and diverse plastic products n.e.c.	270	462	61	613	27	1854	2	1425
Total	2172	3229	380	3812	151	10152	49	21023

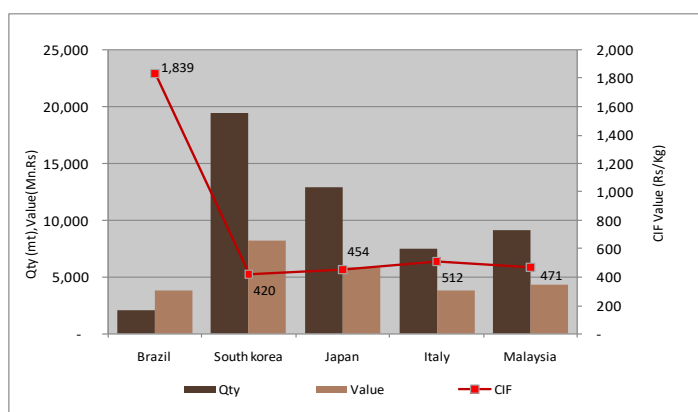
Source : Department of Census and Statistics

Table 9.16: Imports of Rubber and Plastic Products

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Plastics and articles thereof	MT	443,985	127,695	284,242	113,302	436,742	168,969
Rubber and articles thereof.	MT	159,047	46,473	154,342	44,167	198,678	84,503
Rubber and articles thereof.	('000) No	3,990	12,261	3,470	8,064	4,035	16,543
Total	MT	603,032	174,167	438,584	157,468	635,420	253,471
Total	('000) No	3,990	12,261	3,470	8,064	4,035	16,543
Grand Total			186,428		165,532		270,015

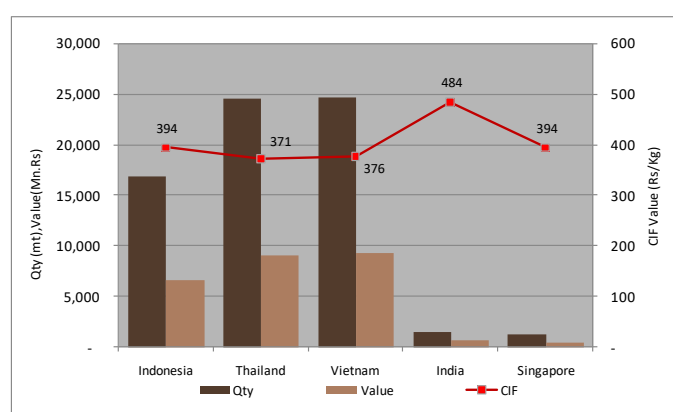
Source: Sri Lanka Customs

Import - Rubber Product



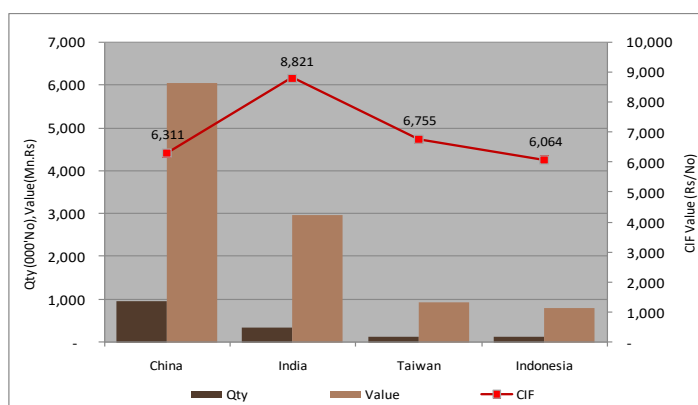
Source : Sri Lanka Customs

Figure 9.5: Major Import Countries of Synthetic rubber and factice derived from oils, in primary forms or in plates, sheets or strip-2021



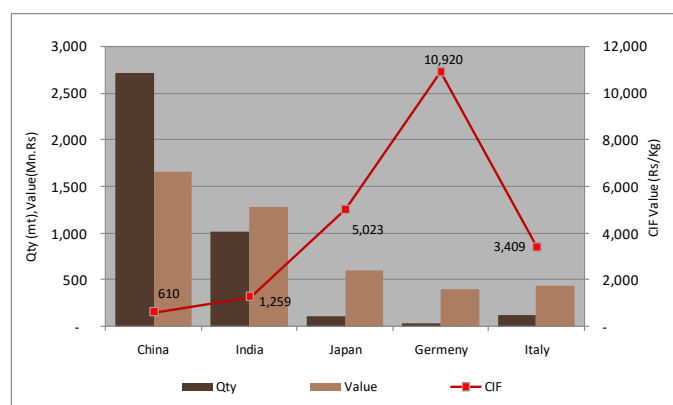
Source : Sri Lanka Customs

Figure 9.6: Major Import Countries of Natural rubber, balata, gutta-percha, guayule, chicly and similar natural gums-2021



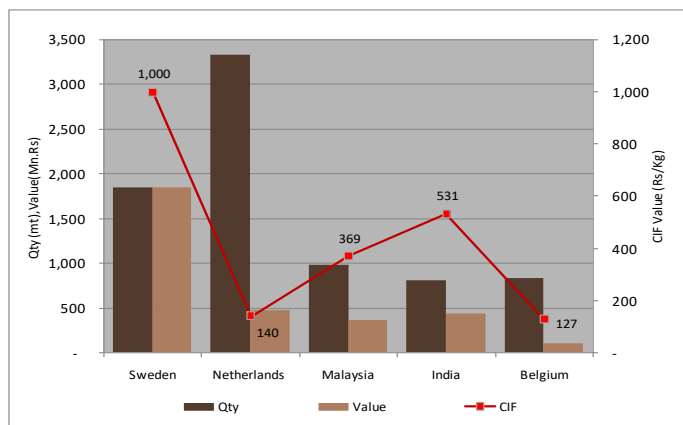
Source : Sri Lanka Customs

Figure 9.7: Major Import Countries of New pneumatic tyres, of rubber-2021



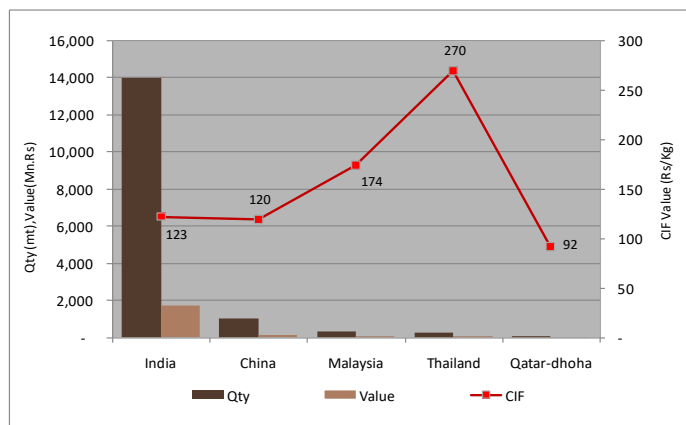
Source : Sri Lanka Customs

Figure 9.8: Major Import Countries of other articles of vulcanized rubber other than hard rubber-2021



Source : Sri Lanka Customs

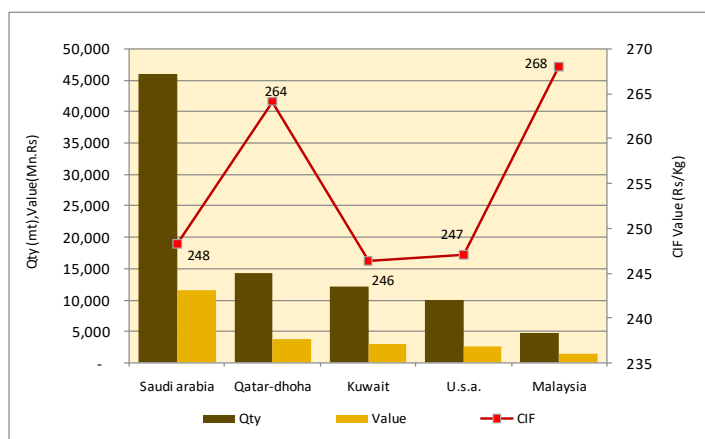
Figure 9.9: Major Import Countries of Compounded rubber, unvulcanised in primary forms or in plates, sheets or strip-2021



Source : Sri Lanka Customs

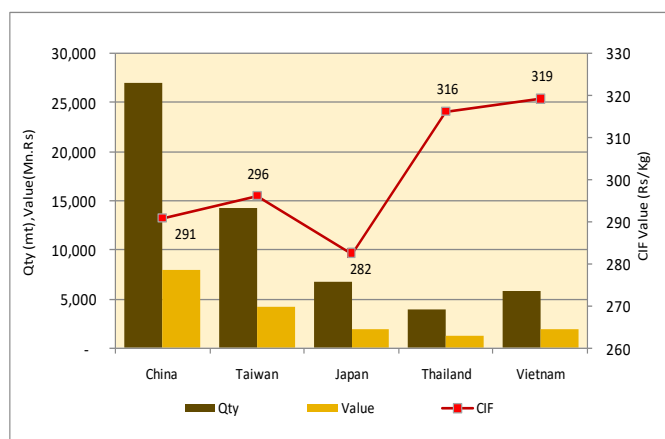
Figure 9.10: Major Import Countries of Reclaimed rubber in primary forms or in plates, sheets or strip-2021

Import - Plastic Product



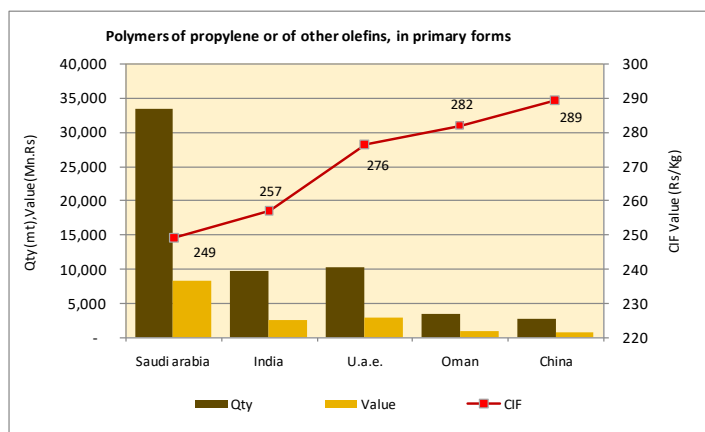
Source : Sri Lanka Customs

Figure 9.11: Major Import Countries of Polymers of ethylene, in primary forms-2021



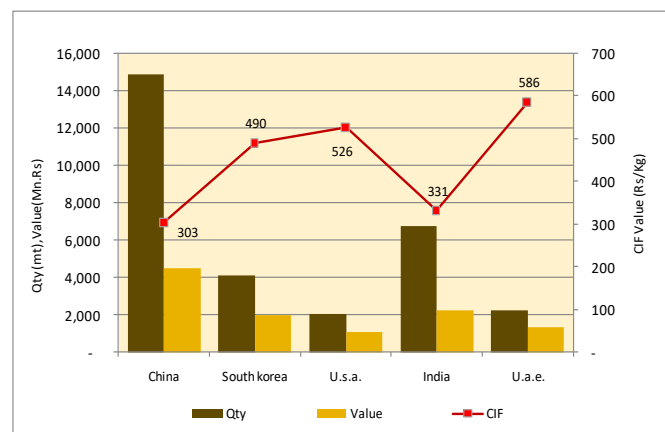
Source : Sri Lanka Customs

Figure 9.12: Major Import Countries of Polymers of vinyl chloride or of other halogenated olefins, in primary forms-2021



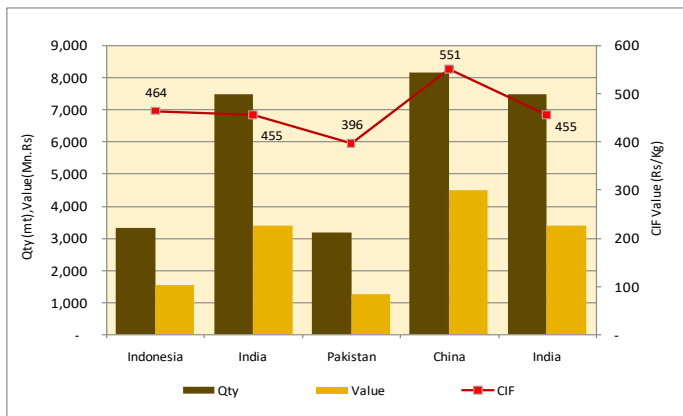
Source : Sri Lanka Customs

Figure 9.13: Major Import Countries of Polymers of propylene or of other olefins, in primary forms-2021



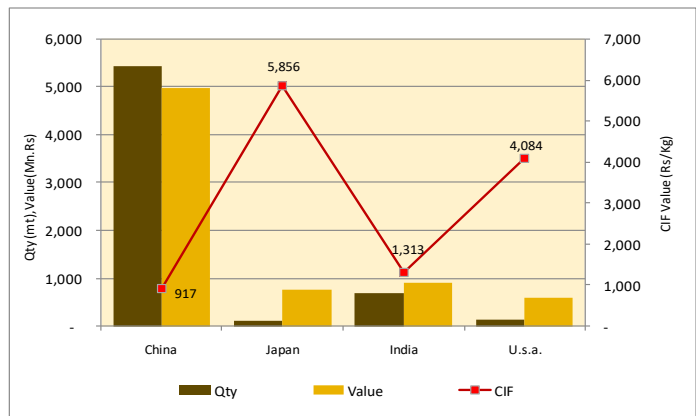
Source : Sri Lanka Customs

Figure 9.14: Major Import Countries of Polyacetals, other polyethers and epoxide resins, in primary forms-2021



Source : Department of Census and Statistics

Figure 9.15: Major Import Countries of other plates, sheets, film, foil and strip, of plastics non-cellular-2021



Source : Department of Census and Statistics

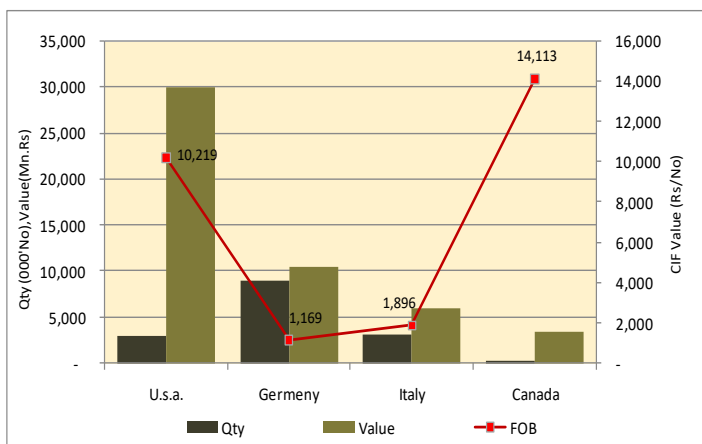
Figure 9.16: Major Import Countries of other articles of plastics and articles of other materials of headings 39.01

Table 9.17: Exports of Rubber and Plastic Products

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Plastics and articles thereof	MT	30,456	13,139	27,497	32,613	27,793	15,646
Rubber and articles thereof.	MT	94,799	67,145	87,738	72,688	84,623	98,993
Rubber and articles thereof.	('000) No	31,851	91,993	30,194	78,392	48,716	118,359
Total	MT	125,255	80,284	115,235	105,300	112,416	114,639
Total	('000) No	31,851	91,993	30,194	78,392	48,716	118,359
Grand Total			172,278		183,692		232,998

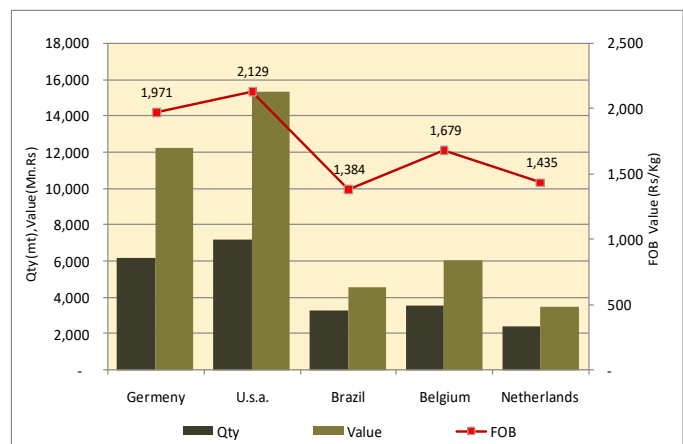
Source: Sri Lanka Customs

Export - Rubber Product



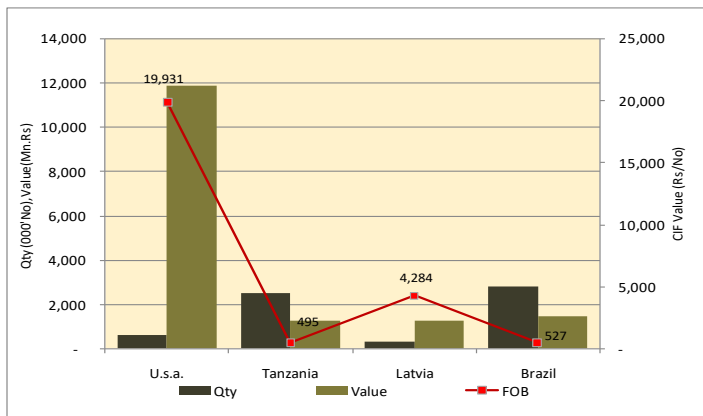
Source : Sri Lanka Customs

Figure 9.17: Major Export Countries of Retreaded or used pneumatic tyres of rubber; solid or cushion tyres, tyre treads and tyre fiap, of rubber-2021



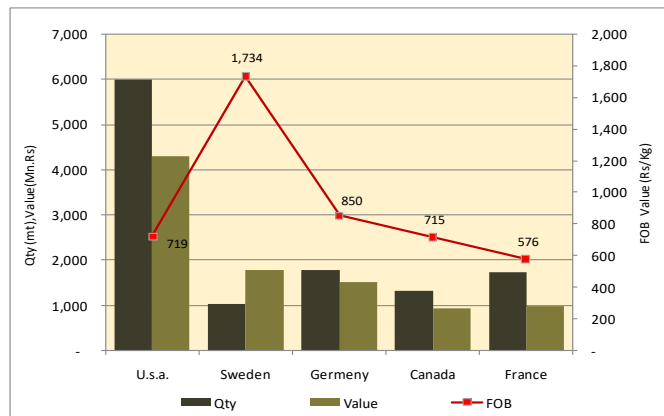
Source : Sri Lanka Customs

Figure 9.18: Major Export Countries of Articles of apparel and clothing accessories- 2021



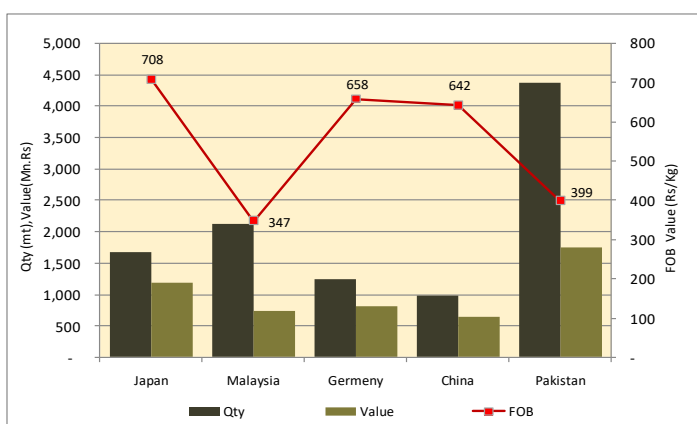
Source : Sri Lanka Customs

Figure 9.19: Major Export Countries of New pneumatic tyres, of rubber-2021



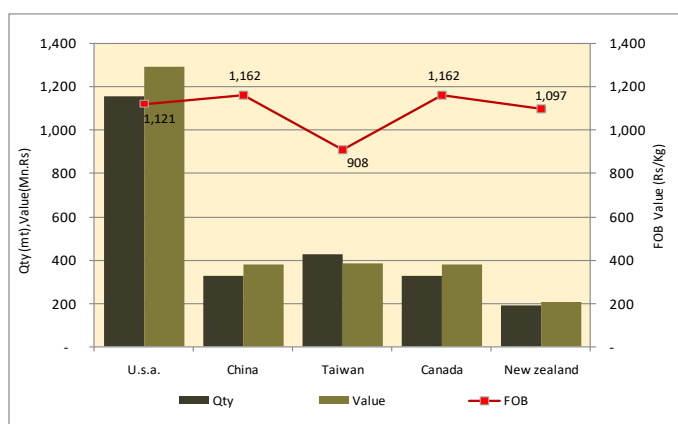
Source : Sri Lanka Customs

Figure 9.20: Major Export Countries of other articles of vulcanized rubber other than hard rubber-2021



Source : Sri Lanka Customs

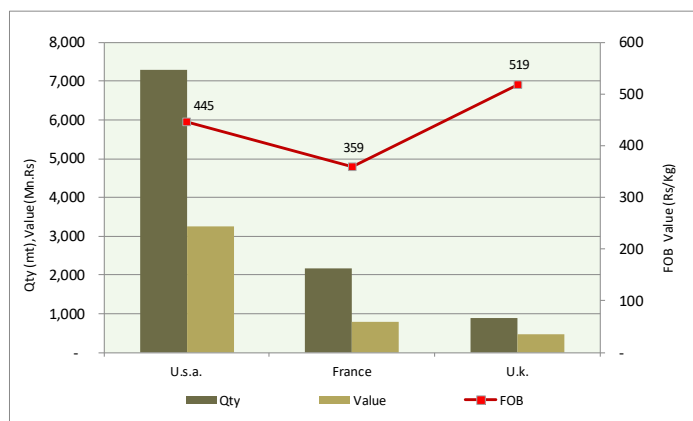
Figure 9.21: Major Export Countries of Natural rubber, balata, gutta-percha, guayule, chicle and similar natural gums-2021



Source : Sri Lanka Customs

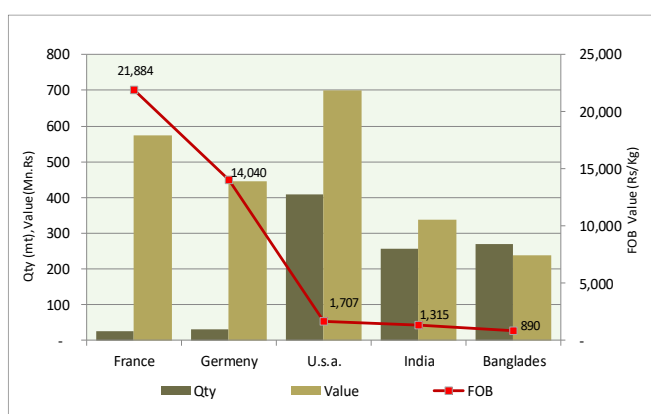
Figure 9.22: Major Export Countries of Plates, sheets, strip, rods and profile shapes, of vulcanized rubber other than hard rubber-2021

Export - Plastic Product



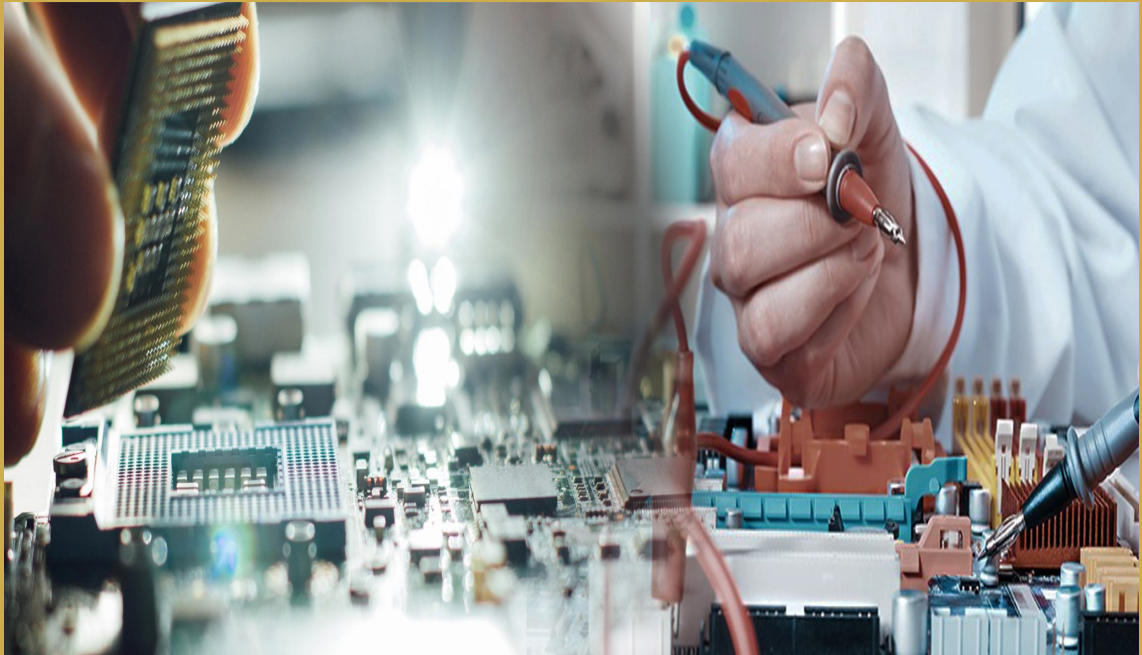
Source : Sri Lanka Customs

Figure 9.23: Major Export Countries of Articles for the conveyance or packing of goods, of plastics; stoppers, lids,



Source : Sri Lanka Customs

Figure 9.24: Major Export Countries of other articles of plastics and articles of other materials of headings 39.01 to 39.09



10. ELECTRICAL EQUIPMENTS AND COMPONENTS INDUSTRY

Overview

During the past four decades, the Electrical equipment and component manufacturing sector in Sri Lanka, has developed into a key industrial manufacturing sector, contributing highly to the economic progress of the country. The industry has gained steady access to the global electronics value-added supply chain by providing high quality and standardized products and services while accomplishing high reputation and recognition amongst the major global market stakeholders. It had a flourishing prospect in 1980's with investments from Japan, Sweden, Switzerland, India, United Kingdom and Germany for mass scale component manufacturing.

At present, Electrical equipment and component manufacturing sector mainly involves in manufacturing of Cable, switch gear, allied accessories, electrical appliances, panel boards, LED lamps and semiconductors. Total investment of the sector is approximately amounts to USD 3,000 million. The industry consisting of more than 100 engaged in design manufacturing and exporting of electronic and electrical products and services with approximately 40,000 employees that include high profile researchers and Design Engineers, Manufacturing Engineers and Managers contributing positively to this rising industry.

Total value of Electrical and Electronic exports stands at USD 433 million by the end of 2021. The Sector Contributed around 3.44% to total merchandise exports in year 2021. Earnings from the merchandise exports increased by 30 per cent year over year (YoY) from USD 328 million in 2020 to USD 433 million in 2021. This is while receiving USD 2.34 billion from USA, the largest buyer for Sri Lanka apparel. Electrical equipment and component manufacturing sector contribution to GDP stands at approximately 0.7%.

The product types manufactured in the Electrical equipment and component sector varies as follows;

Cable manufacture – [PVC/Flexible/Rubber/Welding/Switch gear/Auto/Unarmed/Armed/Telephone cables/Telephone gel](#)

Switch gears - MCB/RCCB/Changeover/ MCCB

Allied accessories - Plug tops/ lamp holders/ sun box/ MCB Box/ Travel adaptors/Convertor

Electrical appliances - Fridge/AC/WM

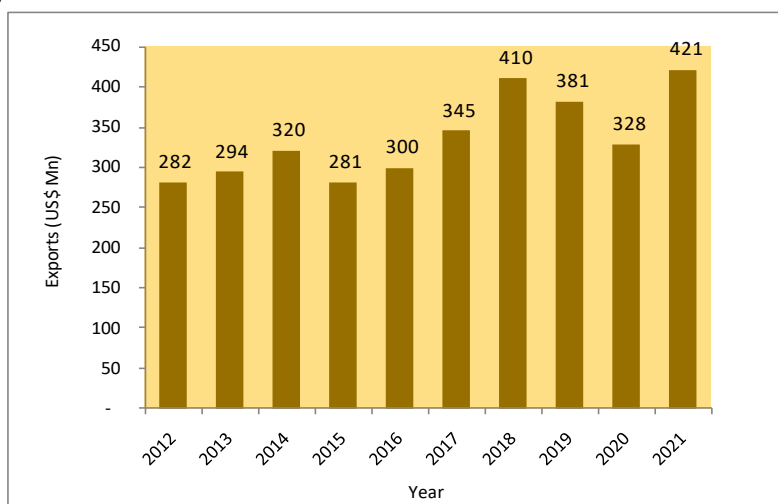
Panel board - ATS/ Main/ Customize panels

LED lamps - GLS Lamps, LED Panel, Tube, Spot

The global printed circuit board (PCB) market experienced rapid growth in the last few years, and was valued at USD 53 billion in 2020, and is expected to reach USD 69 billion by 2027. The Asia-Pacific (APAC) region holds the largest market position in the global PCB market and is projected to remain the fastest growing region in relation to the production of electronic components and devices.

Looking ahead, the industry is moving towards the emerging technologies as IoT, Robotics, Bio-medical, Analytics and advanced Research and Development with a reputation as a 'Design to Delivery Destination' in the electronic and electrical sector. The sector is ambitious to reach a USD 1 billion export target by 2025.

There are opportunities for the global solar photovoltaics (PV) industry, under the sector, Considering the huge demand for solar energy both globally and domestically. As such, there should be a coinciding development in the solar PV manufacturing industry to cater to the increasing demand. The availability of naturally occurring economically viable high purity quartz deposits in many parts of the country and duty free access to huge markets such as EU and India under trade agreements has made the Solar Component Manufacturing sector as one of the most promising sectors in attracting investments to Sri Lanka.



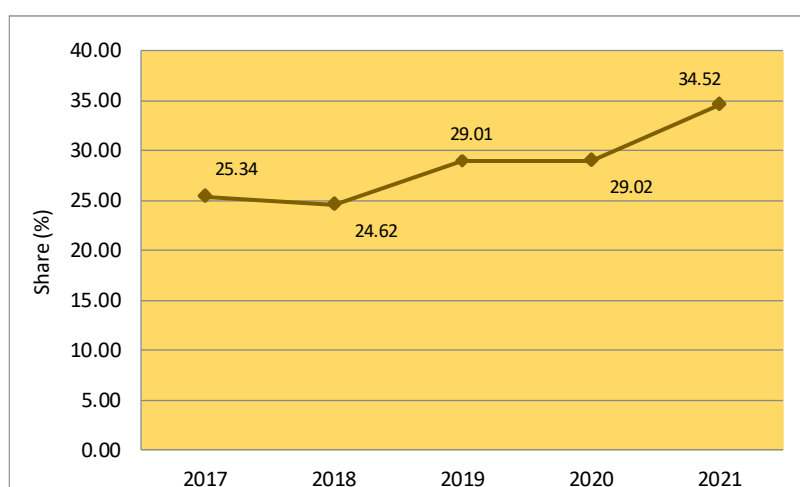
Source; Export Development Board

Figure 10.1: Exports Value of Electrical Equipment's and Components Industry

Table 10.1: Manufacture of Electrical 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 Constant GDP
2017	33,779	0.253	31,013	0.331
2018	35,185	0.246	31,647	0.327
2019	43,508	0.290	31,917	0.323
2020	43,608	0.290	29,264	0.307
2021	58,020	0.345	34,083	0.345

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 10.2: Contribution of the Electrical Equipment's and components Industry sector to the share of the manufacturing industry to

Table 10.2: Manufacturing Establishments and Number of Persons Engaged of Electrical Equipment's (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	63	680	39	11,193
2016	164	1,220	65	12,906
2017	134	1,068	84	14,320
2018	46	477	63	15,455
2019	38	449	98	14,994

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

Table 10.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Electrical Equipment's (2015) (Establishments with 5 or more persons engaged)

2015								
Size	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	36	207	166	37,596,125	133,738,952	58,324,955	75,413,997	2,728,650
10 to 99	48	1,710	1,640	473,562,384	4,318,920,319	2,764,926,963	1,553,993,356	462,108,302
100 & above	19	9,956	9,936	4,760,710,169	65,756,336,952	37,664,200,855	28,092,136,097	2,428,229,645
Group total	103	11,873	11,742	5,271,868,678	70,208,996,223	40,487,452,773	29,721,543,450	2,893,066,597

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

Table 10.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size class of Manufacture of Electrical Equipment's (2016) (Establishments with 5 or more persons engaged)

2016								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Out put (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	140	700	420	103,640,000	519,852,320	289,019,491	230,832,829	933,120
10 to 99	67	2,966	2,904	814,482,782	8,222,087,019	5,668,329,905	2,553,757,114	878,035,134
100 & above	22	10,460	10,450	5,430,384,008	67,152,010,689	39,935,232,635	27,216,778,054	1,782,859,194
Group total	229	14,126	13,774	6,348,506,790	75,893,950,028	45,892,582,031	30,001,367,997	2,661,827,448

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

Table 10.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Electrical Equipment's (2017) (Establishments with 5 or more persons engaged)

2017								
Size	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	107	554	361	87,610,749	671,004,103	377,733,405	293,270,698	483,525
10 to 99	89	3,651	3,576	1,223,644,298	8,175,733,724	5,293,217,600	2,882,516,125	720,936,022
100 & above	22	11,184	11,175	5,972,827,055	69,029,246,943	40,997,198,699	28,032,048,245	2,571,838,042
Group total	218	15,389	15,112	7,284,082,102	77,875,984,770	46,668,149,704	31,207,835,068	3,293,257,589

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

Table 10.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Electrical Equipment's (2018) (Establishments with 5 or more persons engaged)

2018								
Size	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	26	144	103	27,413,264	147,174,427	90,089,836	57,084,591	-
10 to 99	56	2,306	2,246	700,769,214	7,310,850,098	4,686,461,077	2,624,389,021	630,700,063
100 & above	27	13,481	13,466	6,509,995,741	75,470,581,964	44,935,136,910	30,535,445,055	2,599,154,152
Group total	109	15,931	15,815	7,238,178,219	82,928,606,489	49,711,687,823	33,216,918,667	3,229,854,215

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

Table 10.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Manufacture of Electrical Equipment's (2019) (Establishments with 5 or more persons engaged)

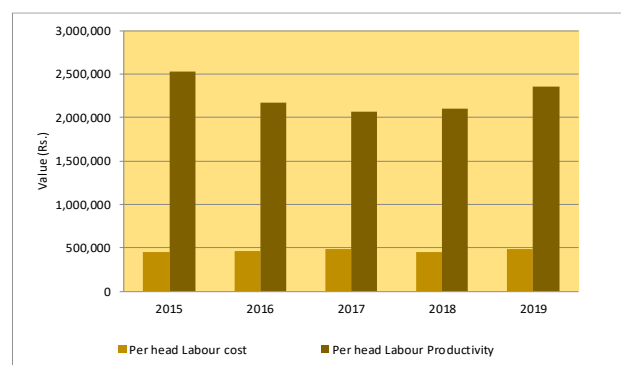
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	17	107	83	20,153,474	84,366,026	55,951,548	28,414,478	748,745
10 to 99	99	3,774	3,642	1,409,142,037	10,468,566,565	5,708,636,343	4,759,930,222	576,498,785
100 & above	20	11,562	11,559	6,033,871,232	79,426,409,205	48,113,144,035	31,313,265,171	3,135,613,239
Group total	136	15,443	15,284	7,463,166,742	89,979,341,796	53,877,731,926	36,101,609,870	3,712,860,768

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

Table 10.8: Manufacturing of Electrical Equipment's Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	448,975	2,531,216	5.64
2016	460,905	2,178,116	4.73
2017	482,006	2,065,103	4.28
2018	457,678	2,100,343	4.59
2019	488,299	2,362,052	4.84

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



Source : Department of Census and Statistics

Figure 10.3: Manufacturing of Electrical Equipment's Per Head Labour Productivity

Table 10.9: Value of Output & Output Components Classified by Industry of Electrical Equipment's - 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	69,696,388,154	67,160,262,847	659,208,720	2,064,665,892
2016	74,448,896,108	73,063,017,890	1,186,532,810	199,345,408
2017	76,432,354,444	73,450,224,063	115,841,376	2,866,289,005
2018	82,528,420,674	80,905,898,452	385,647,759	1,236,874,462
2019	89,393,335,186	88,166,840,898	140,405,834	1,086,088,454

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

Table 10.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Industry of Electrical Equipment's

(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	40,229,280,363	37,746,942,855	1,804,712,801	677,624,708
2016	44,906,025,770	41,473,047,347	2,521,268,324	911,710,099
2017	45,766,458,537	42,425,366,683	2,516,890,220	824,201,634
2018	49,514,349,769	43,757,994,528	4,023,917,989	1,732,437,253
2019	53,685,876,248	48,299,641,262	3,966,648,643	1,419,586,342

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

Table 10.11: Employment by Nature of Employment & Gender Classified by 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	25	7	8	6	4,078	4,439	2,177	462	6,279	4,915
2016	49	21	-	2	5,939	3,285	3,047	563	9,035	3,871
2017	36	15	-	2	7,203	3,077	3,437	551	10,676	3,644
2018	32	15	3	6	7,635	3,769	3,340	656	11,009	4,446
2019	41	30	27	14	8,394	2,827	3,186	474	11,649	3,345

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

**Table 10.12.1: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments with 25 or more persons engaged) - 2015**

Industry class	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
Manufacture of electric motors ,generators .transformers and electricity distribution and control apparatus	2,984,703	2.320	1.690	1,698,363	1.320	0.962
manufacture of batteries and accumulators	8,231,880	1.417	5.653	2,421,984	0.417	1.663
manufacture of other electrical electric wire and cables	16,761,720	1.759	9.987	7,230,604	0.759	4.308
manufacture of wiring and devices	3,074,261	2.465	3.314	1,826,989	1.465	1.970
manufacture of electric lighting equipment's	2,178,243	1.986	3.077	1,081,679	0.986	1.528
manufacture of domestic appliance	6,752,718	1.274	4.023	1,451,516	0.274	0.865
manufacture of other electrical equipment	1,606,502	1.305	3.417	54,707	0.035	0.116

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

**Table 10.12.2: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments with 25 or more persons engaged) - 2016**

Industry class	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
Manufacture of electric motors ,generators .transformers and electricity distribution and control apparatus	2,687,426	3.502	2.120	1,919,943	2.502	1.515
manufacture of batteries and accumulators	8,231,880	1.417	5.653	2,421,984	0.417	1.663
manufacture of other electrical electric wire and cables	7,636,309	1.609	5.020	2,889,240	0.609	1.899
manufacture of wiring and devices	3,177,742	1.463	4.344	1,005,435	0.463	1.374
manufacture of electric lighting equipment's	8,723,956	1.572	3.836	3,173,006	0.572	1.359
manufacture of domestic appliance	1,723,118	1.646	3.764	676,089	0.646	1.477

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

**Table 10.12.3: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments with 25 or more persons engaged) - 2017**

Industry class	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
Manufacture of electric motors ,generators .transformers and electricity distribution and control apparatus	3,445,593	2.060	3.143	1,096,213	1.060	1.618
manufacture of batteries and accumulators	8,231,880	1.417	5.653	1,456,206	0.417	1.663
manufacture of other electrical electric wire and cables	7,789,304	1.658	5.040	1,545,555	0.658	2.000
manufacture of wiring and devices	3,500,668	1.464	5.056	692,440	0.464	1.602
manufacture of electric lighting equipment's	4,310,406	1.647	1.432	3,010,124	0.647	0.563
manufacture of domestic appliance	1,723,118	1.646	3.764	457,823	0.646	1.477

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

**Table 10.12.4: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments with 25 or more persons engaged) - 2018**

Industry class	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
Manufacture of electric motors ,generators. transformers and electricity distribution and control apparatus	4,545,395	1.746	3.810	1,942,687	0.746	1.628
manufacture of batteries and accumulators	9,088,671	1.569	2.412	3,295,077	0.569	0.874
manufacture of other electrical electric wire and cables	7,448,930	1.648	5.455	2,927,928	0.648	2.144
manufacture of wiring and devices	5,694,932	2.004	4.364	2,852,733	1.004	2.186
manufacture of electric lighting equipment's	5,208,800	1.476	3.017	1,680,788	0.476	0.973
manufacture of domestic appliance	1,721,237	1.674	3.598	692,886	0.674	1..448

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

**Table 10.12.5: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments less than 25 persons engaged) - 2019**

Industry class	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
Manufacture of electric motors ,generators. transformers and electricity distribution and control apparatus	3,522,901	1.836	4.552	1,603,934	0.836	2.072
manufacture of batteries and accumulators	10,016,913	1.639	3.371	3,905,827	0.639	1.315
manufacture of other electrical electric wire and cables	8,042,211	1.641	4.845	3,140,492	0.641	1.892
manufacture of wiring and devices	4,620,252	1.642	3.400	1,806,564	0.642	1.330
manufacture of electric lighting equipment's	5,672,327	1.705	2.248	2,344,925	0.705	0.929
manufacture of domestic appliance	1,931,532	1.635	5.197	750,427	0.635	2.019

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

Table 10.13: Categories of Employees by Nature of Employment Classified by Industry of Electrical Equipment's (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	11,147	7,527	991
2016	12,834	7,880	1,344
2017	14,268	9,145	1,135
2018	15,400	9,810	1,594
2019	14,881	9,189	2,033

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

Table 10.14: Number of Electrical & Electronic Sector Manufacturing Industries and Engaged Persons in Sri Lanka

(2013/14 Economic Census)

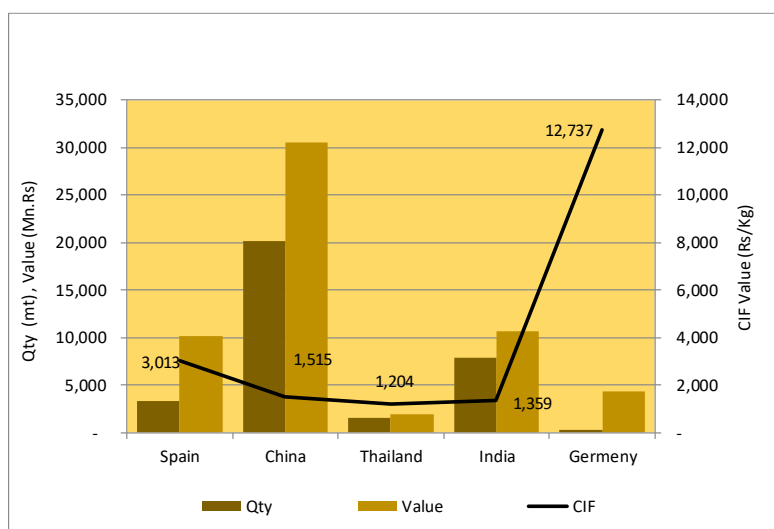
Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE
Manufacture of electric motors	2	3	-	-	1	30	-	-
Manufacture of transformers	2	3	3	25	2	150	-	-
Manufacture of power circuit breakers, Electric Fuses, electrical power switches not for electrical circuits etc.	4	6	-	-	-	-	1	215
Manufacture of other motors, generators, transformers and electricity distribution & control apparatus	8	15	4	56	3	109	2	1,256
Manufacture of dry cell batteries	-	-	1	10	2	260	1	254
Manufacture of wet cell batteries	1	1	-	-	-	-	-	-
Manufacture of electric accumulators and parts	3	6	-	-	-	-	-	-
Manufacture of other batteries accumulators n.e.c.	1	1	-	-	-	-	-	-
Manufacture of insulated electric wire and cables for house wiring	2	7	2	25	4	332	1	279
Manufacture of insulated electric wire for power distribution in main power lines	1	2	-	-	1	38	-	-
Other electrical, Electronic and network cables	-	-	1	10	1	70	-	-
Manufacture of switches, for electrical wiring	3	7	-	-	3	125	2	749
Manufacture of electrical conduit & fittings, outlets, sockets, switch boxes, lamp holders etc.	11	24	4	39	-	-	2	580
Manufacture of lightening arrestors and coils	-	-	-	-	1	25	-	-
Manufacture of other wiring devices n.e.c.	2	2	3	21	-	-	1	275
Manufacture of filament bulbs	20	29	4	55	2	118	-	-
Manufacture of CFL and Fluorescent bulbs	45	60	3	33	2	70	-	-
manufacture of other bulbs	99	129	8	65	1	50	-	-
Manufacture of table lamps, flashlights, spotlight, lighting sets etc.	8	15	1	5	-	-	-	-
Manufacture of lanterns (Electric, Kerosene, Gasoline, Carbide), Chandeliers etc.	28	35	1	12	-	-	-	-
Manufacture of other electric lighting equipment's	41	78	6	69	1	60	1	636
Manufacture of Refrigerators, freezers, Washing Machines, Vacuum cleaners, Floor polishers, Grinders, Blenders, J	7	14	3	33	4	276	3	905
Manufacture of electric water heaters, Smooth irons, Electric Cookers, Electric Ovens, Dryers, Microwave Ovens, h	10	23	6	56	1	109	-	-
Manufacture of gas cookers and non electric cooking appliances	2	3	2	18	-	-	-	-
Tin openers, Electric Shavers, Knife sharpeners, Electric dryers, Combs, brushes, curlers etc.	5	8	-	-	-	-	-	-
Manufacture of other domestic appliances	27	36	8	73	2	240	-	-
Manufacture of Electric Bells, electro magnets, door opening and closing devices etc.	1	1	-	-	-	-	-	-
Manufacture of other electrical equipment n.e.c.	72	119	21	228	5	226	2	1,458
Total	405	627	81	833	36	2,288	16	6,607

Source: Department of Census and Statistics

Table 10.15: Electrical & Electronic Imports (2019-2021)

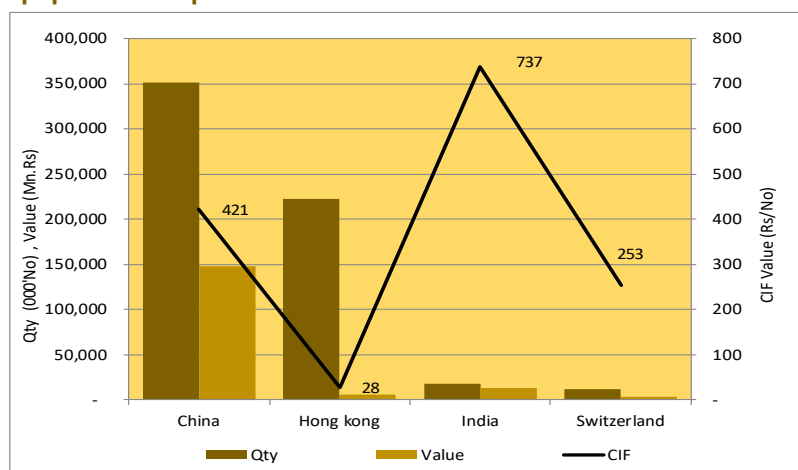
Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers and parts and accessories of such articles	MT	737,048	236,650	790,773	244,022	790,345	320,677
Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers and parts and accessories of such articles	('000) No	721,600	222,334	777,481	232,677	772,578	303,072
Total	MT	737,048	236,650	790,773	244,022	790,345	320,677
Total	('000) No	721,600	222,334	777,481	232,677	772,578	303,072
Grand Total			458,984		476,699		623,750

Source: Sri Lanka Customs



Source : Sri Lanka Customs

Figure 10:4 Major Imports Countries of Electrical machinery and equipment and parts thereof - 2021



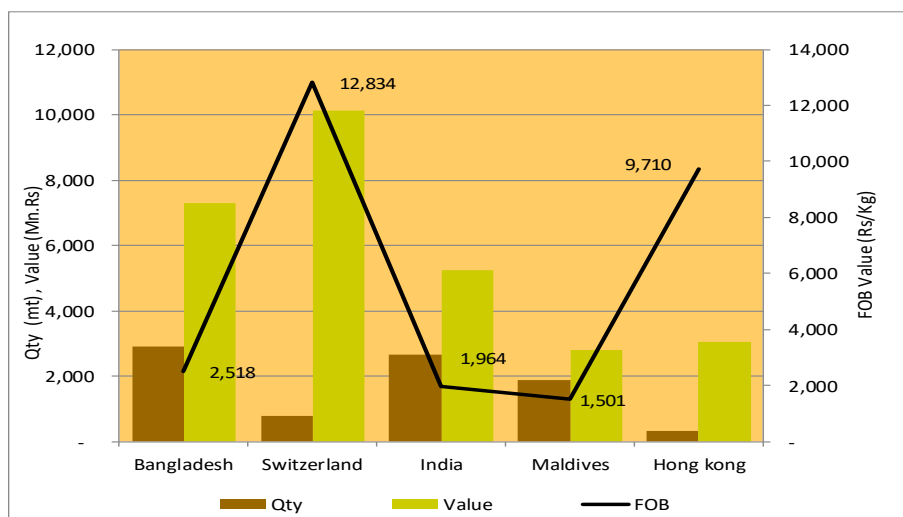
Source : Sri Lanka Customs

Figure 10:5: Major Imports Countries of Electrical machinery and equipment and parts thereof - 2021

Table 10.16: Electrical & Electronic Exports (2019-2021)

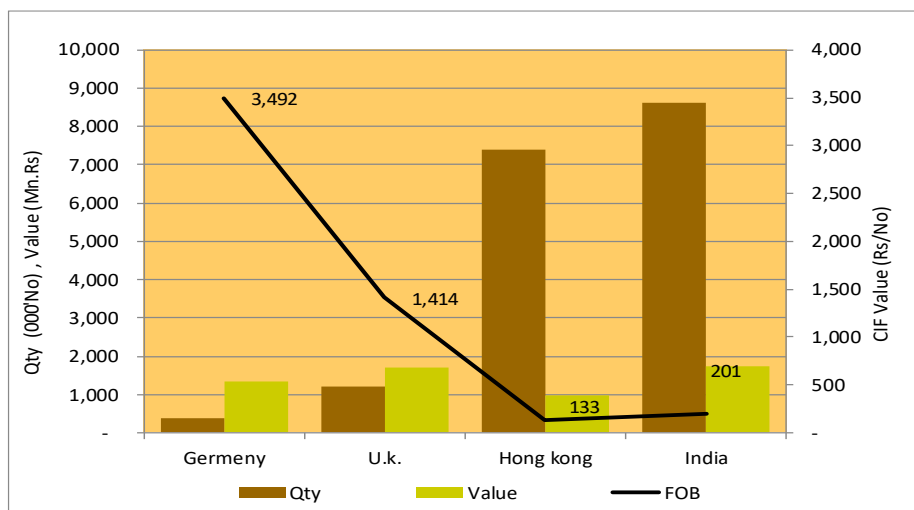
Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	MT	77,223	53,146	60,524	45,737	63,185	51,416
Electrical machinery and equipment and parts thereof; sound recorders and reproducers, television image and sound recorders and reproducers, and parts and accessories of such articles	('000) No	70,492	41,845	54,958	36,633	58,907	58,274
Total	MT	77,223	53,146	60,524	45,737	63,185	51,416
Total	('000) No	70,492	41,845	54,958	36,633	58,907	58,274
Grand Total			94,991		82,370		109,689

Source: Sri Lanka Customs



Source : Sri Lanka Customs

Figure 10.6: Major Exports Countries of Electrical machinery and equipment and parts of Thereof - 2021



Source : Sri Lanka Customs

Figure 10.7: Major Exports Countries of Electrical machinery and equipment and parts of thereof - 2021



11. CERAMIC,PORCELAIN, TILE & GRANITE SECTOR INDUSTRY

Overview

Ceramic, Porcelain, Tile and Granite sector consist of the subsectors of manufacturing Tableware, kitchen ware, home ware, Ornamental ware, Sanitary ware, Floor tiles, wall tiles, Red Clay Roof Tiles, Glass bottles and jars, Cut stone products and Craft pottery.

Total export earnings from the sector amounted to USD 61 million by the end of 2021. During 2021 the table ware sector was the highest contributor to the sector exports which amounted to USD 23 million. That is a 58% increase in the table ware exports compared to year 2020 which recorded USD 14.5 million. Floor tiles and wall tiles exports amounted to USD 7.9 million in 2021 compared to USD 4.9 million export earnings recorded in 2020. Ornamental ware sector is reported as the third highest sector of export earnings of the sector which amounted to USD 3.9 million.

The Sector Contributed 0.31 % to total merchandise exports in year 2021. This is while receiving USD 7.6 million from USA, the largest buyer of the sector. India, Australia, Japan, UK, Germany and Italy, are the major buyers of Ceramic and Tile products of Sri Lanka. Sector contribution to GDP stands at approximately 0.16%.

The industry provides direct employment for about 30,000 people and indirect employment for more than 20,000 people. The tableware and ornamental ware sector employed 16,000 to 18,000 while the tile sector accounts for 2,000 - 4,000 employees.

Ceramic, Porcelain, Tile and Granite sector mainly imports High Quality Ball Clay, High Quality Kaolin, Unfinished stone, Soda Ash, High quality Plaster for moulds, Alumina, Colour Pigments and additives which accounted for USD 150 million in 2021. Floor tile and wall tile imports has declined by around 70% from imports amounted to USD 20 million recorded in 2020 to USD 5 million recorded in 2021.

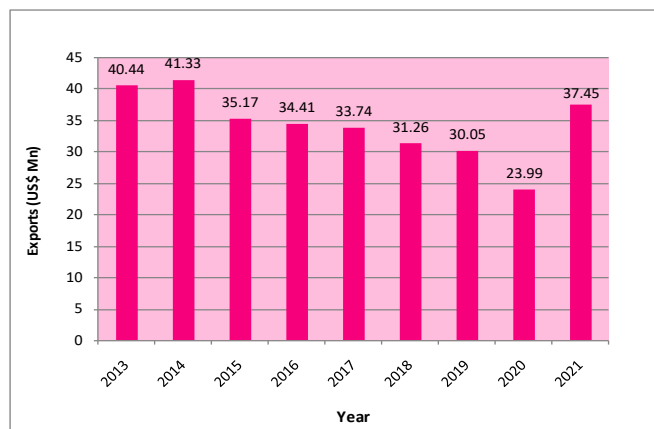


Figure 11.1: Exports Value of Ceramic, Porcelain, Tile & Granite Products Industry

Source; Export Development Board

In early 2020, Sri Lanka did not have the capacity to fulfil the demand of bath ware in the country.

Due to government requests to increase manufacturer capacities, a number of factories were set up with investments of up to nearly Rs. 20 billion. This significantly increased capacity helped the industry reach its desired target within a span of two years.

Currently, the Tile Sector Annual production capacity is 16.0 Mnsqm. The local tile cluster is on a low base with the per capita tile consumption only at 0.6m² compared to Europe at 6m² per person, Brazil 2.5m² per person and China at 2m² per person. Low per capita tile consumption in Sri Lanka proves that there is ample room for the tile sector to grow. At present, floor tiles contribute 77% whilst wall tiles contribute 23% to the local tile cluster.

All Sri Lankan Porcelain Tableware products conform to Food & Drug Administration (FDA) norms ASTM Standards. The tableware and kitchenware exports amount to around 63 per cent of the country's total ceramic exports. There are three key players in the country and their main export markets are India, USA, Japan, UAE, and Sweden.

Sri Lanka manufactures Bath ware & sanitary ware for both domestic & international markets. The product quality conforms to British standard specification BS EN 3402-1962, thereby ensuring that the products will be on par with that of any leading European manufacturer in terms of both design and quality.

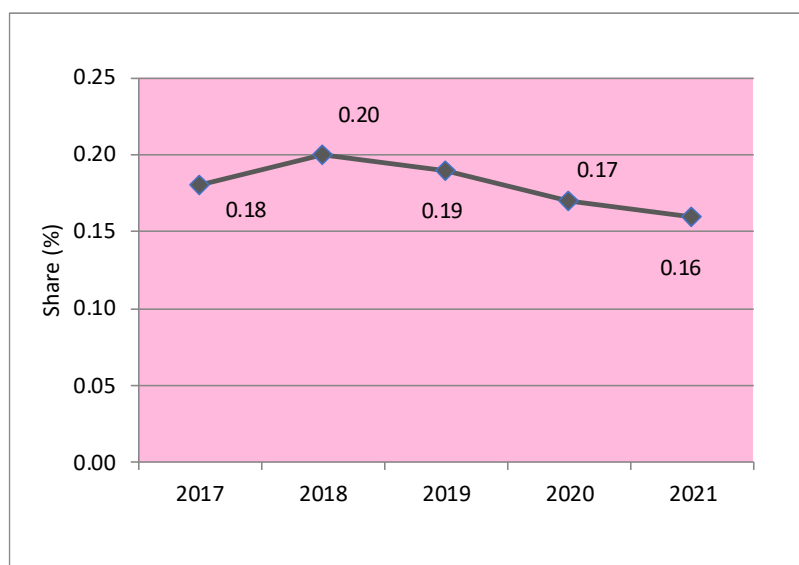
Sri Lanka has the availability of a highly skilled and literate workforce. Aplenty of trained and gifted designers, chemists, technologists and engineers provide a highly productive workforce. Sri Lanka is blessed with high quality mineral deposits like Quartz, Feldspar, Silica Sand, Dolomite, Kaolin and Ball clay which are essential for ceramic. The outstanding quality and purity of these materials contribute to the high standard of the products.

Going in line with the global trends, Sri Lanka has to convert from traditional ceramics into technical and advanced ceramic adopting Innovative thinking in terms of design and product ideas There is a high requirement for ceramic engineers, material science graduates and many other skilled and unskilled labours in similar new trends to join the industry.

Table 11.1: Manufacture of Ceramic, Porcelain, Tile & Granite Product Contributions to the GDP at Current and Constant Market Price (2017 - 2021)

Year	Current		Constant	
	Contribution Value (Rs. Mn)	Share (%)	Contribution Value (Rs. Mn)	Share (%)
2017	23,743	0.18	32,909	0.35
2018	28,381	0.20	34,233	0.35
2019	27,754	0.19	31,408	0.32
2020	25,794	0.17	28,725	0.30
2021	26,280	0.16	31,129	0.32

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 11.2: The Contribution of the Ceramic, Porcelain, Tile & Granite Product Manufacturing Industry to the GDP

Table 11.2: Manufacturing Establishments and Number of Persons Engaged of Ceramic, Porcelain, Tile & Granite Product Industry (2015-2018)

Year	Establishments less than 25 persons engaged		Establishments 25 or more persons engaged	
	No of Establishments	Persons engaged	No of Establishments	Persons engaged
2015	1,547	13,842	91	20,509
2016	1,429	12,576	108	13,887
2017	1,646	12,718	189	19,787
2018	1,701	15,004	201	22,880
2019	2,204	18,571	78	17,674

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

Table 11.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Ceramic, Porcelain, Tile & Granite Product Industry (2015)
(Establishments with 5 or more persons engaged)

2015								
Size	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	992	5,649	4,617	1,288,301,269	5,725,596,446	2,581,848,400	3,143,748,047	107,574,697
10 to 99	602	10,241	9,269	2,175,923,028	7,459,231,763	3,128,159,698	4,331,072,065	573,211,419
100 & above	43	18,461	17,935	10,727,349,344	186,713,216,956	148,240,572,911	38,472,644,045	3,138,262,202
Group total	1,637	34,351	31,821	14,191,573,642	199,898,045,165	153,950,581,008	45,947,464,157	3,819,048,318

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

Table 11.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Ceramic, Porcelain, Tile & Granite Product Industry (2016)
(Establishments with 5 or more persons engaged)

2016								
Size	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	1048							
10 to 99	451							
100 & above	38	10,905	10,897	4,817,528,756	142,425,703,905	107,680,869,479	34,744,834,425	18,526,578,233
Group total	1537	26,463	23,532	7,879,189,684	205,504,154,543	151,609,880,591	53,894,273,952	19,620,160,497

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

Table 11.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Ceramic, Porcelain, Tile & Granite Product Industry (2017)
(Establishments with 5 or more persons engaged)

2017								
Size	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	1299	7,316	3,740	883,344,794	6,201,018,651	3,905,373,572	2,295,645,078	491,133,250
10 to 99	488	10,182	9,605	2,560,028,103	31,483,230,879	19,364,308,861	12,118,922,017	270,622,595
100 & above	49	15,007	14,943	7,316,295,554	172,789,804,137	130,035,104,425	42,754,699,711	35,215,766,812
Group total	1836	32,505	28,288	10,759,688,451	210,474,053,666	153,304,786,859	57,169,266,807	35,977,522,657

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

Table 11.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Ceramic, Porcelain, Tile & Granite Product Industry (2018)
(Establishments with 5 or more persons engaged)

2018								
Size	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	1176							
10 to 99	673							
100 & above	53							
Group total	1902							

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

Table 11.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Ceramic, Porcelain, Tile & Granite Product Industry (2019)
(Establishments with 5 or more persons engaged)

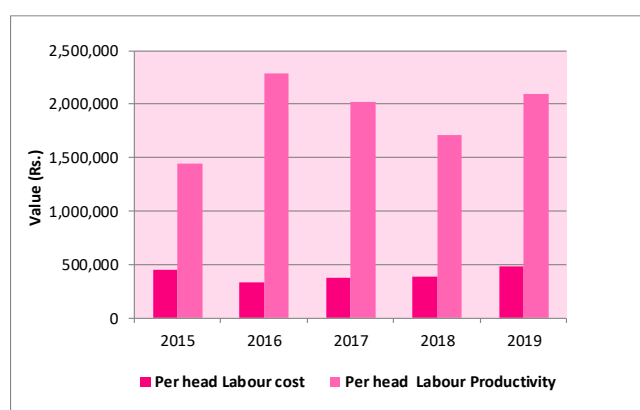
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	1494							
10 to 99	745							
100 & above	43							
Group total	2282							

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

Table 11.8: Manufacturing of Ceramic, Porcelain, Tile & Granite Product Industry Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	445,981	1,443,935	3.24
2016	334,829	2,290,255	6.84
2017	380,362	2,020,972	5.31
2018	388,271	1,715,090	4.42
2019	480,372	2,095,732	4.36

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



Source : Department of Census and Statistics

Figure 11.3: Manufacturing of Ceramic, Porcelain, Tile & Granite Product Industry Per Head Labour Productivity

Table 11.9: Value of Output & Output Components Classified by Ceramic, Porcelain, Tile & Granite Product 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	189,643,517,812	165,810,835,402	(342,192,211)	24,174,874,621
2016	192,198,708,107	154,049,177,887	24,880,416,679	13,269,113,542
2017	194,556,609,781	171,002,722,875	1,243,693,862	22,310,143,044
2018	208,303,426,747	207,286,931,317	(1,767,910,948)	2,784,406,377
2019	229,067,439,155	224,930,863,095	3,142,765,216	993,810,842

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

Table 11.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Ceramic, Porcelain, Tile & Granite Product 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	149,466,947,604	132,987,373,900	6,135,098,569	10,344,475,136
2016	144,571,382,537	120,531,751,624	9,322,127,102	14,717,503,811
2017	143,513,299,851	113,841,465,318	13,136,456,528	16,535,378,005
2018	154,160,479,739	125,444,352,035	13,193,319,172	15,522,808,532
2019	169,527,448,982	121,549,777,294	23,989,661,340	23,988,010,346

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

Table 11.11: Employment by Nature of Employment & Gender Classified by Industry Division of Ceramic, Porcelain, Tile & Granite Product
- 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	64	16	533	46	12,195	4,360	2,972	324	15,763	4,745
2016	62	8	10	22	7,384	2,163	3,511	728	10,966	2,921
2017	65	6	56	22	11,658	2,273	4,854	854	16,632	3,155
2018	482	87	87	379	12,978	1,852	5,639	1,375	19,187	3,693
2019	202	40	3	-	8,251	2,434	5,753	991	14,209	3,465

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

**Table 11.12: Economic Indicators of Industrial Activity Classified by Industry Class
(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	740,807	2.287	1.238	416,901	1.287	0.697
2016	1,057,989	1.890	0.782	498,319	0.890	0.368
2017	1,251,583	1.626	0.803	481,682	0.626	0.309
2018	829,117	1.798	0.955	368,008	0.798	0.424
2019	1,056,220	1.655	1.069	417,862	0.655	0.423

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

**Table 11.13: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments with 25 or more persons engaged)**

Table 11.13.1: Manufacture of Glass and Glass Products

Year	Output per persons engaged (Rs.)	Output per intermediate consumptions	Output per assets	Value added per persons engaged (Rs.)	Value added per intermediate consumptions	Value added per assets
2016	13,032,261	1.351	1.326	3,388,388	0.351	0.345
2017	13,688,926	1.294	1.223	11,192,220	0.294	0.278
2018	13,662,682	1.743	1.072	5,823,044	0.743	0.457
2019	15,466,314	1.328	1.166	3,822,250	0.328	0.288

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

Table 11.13.2: Manufacture of Non-metallic Mineral products

Year	Output per persons engaged (Rs.)	Output per intermediate consumptions	Output per assets	Value added per persons engaged (Rs.)	Value added per intermediate consumptions	Value added per assets
2016	13,891,947	1.328	2.717	3,432,380	0.328	0.671
2017	9,571,315	1.362	1.644	5,823,171	0.362	0.437
2018	8,944,990	1.335	1.924	2,245,683	0.335	0.483
2019	12,678,267	1.354	1.793	3,317,698	0.354	0.469

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

Table 11.14: Categories of Employees by Nature of Employment Classified by Ceramic, Porcelain, Tile & Granite Product industry
(Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	19,851	15,417	1,138
2016	13,785	7,458	2,089
2017	19,638	10,477	3,454
2018	21,845	12,342	2,488
2019	17,430	9,384	1,301

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

Table 11.15: Number of Ceramic, Porcelain, Tile & Granite Product Manufacturing Industries and Engaged Persons in Sri Lanka
(2013/14 Economic Census)

Table 11.15.1: Manufacture of Glass and Glass Products

Industry	Micro		Small		Medium		Large	
	No. of Es-tab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of flat glass (wired, coloured, tinted flat glass etc.)	7	12	-	-	1	41	-	-
Manufacture of glass mirrors	4	8	2	13	2	68	-	-
Manufacture of bottles and other containers of glass	8	12	-	-	1	35	1	418
Manufacture of drinking glasses	1	2	-	-	-	-	-	-
Manufacture of glass articles for domestic use	7	12	-	-	-	-	-	-
Manufacture of laboratory, hygienic, pharmaceutical, glass fibre, optical glass etc.	16	25	-	-	1	38	-	-
Manufacture of other glass products n.e.c.	117	181	5	53	2	65	-	-
Total	160	252	7	66	7	247	1	418

Source: Department of Census and Statistics

Table 11.15.2: Manufacture of Refractory Products

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 Es-tab.	No. of PE
Manufacture of refractory mortars, concretes etc.	2	4	1	10	-	-	-	-
Manufacture of refractory ceramic goods, such as heat insulating ceramic goods, pipes, blocks, containers, tiles	35	87	5	26	-	-	-	-
Manufacture of other refractory articles n.e.c.	2	2	-	-	1	37	-	-
Total	39	93	6	36	1	37	-	-

Source: Department of Census and Statistics

Table 11.15.3: Manufacture of Clay Building Materials

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 Es-tab.	No. of PE
Manufacture of non refractory roofing tiles	63	191	316	2,794	4	261	-	-
Manufacture of non refractory bricks	13,517	24,771	435	2,817	3	284	-	-
Manufacture of ceramic/porcelain floor tiles, wall tiles	46	80	10	103	2	68	5	2,303
Manufacture of ceramic sanitary fixtures	3	7	1	6	1	100	-	-
Manufacture of other products of clay building materials n.e.c.	69	139	5	45	-	-	-	-
Total	13,698	25,188	767	5,765	10	713	5	2,303

Source: Department of Census and Statistics

Table 11.15.4: Manufacture of Other Porcelain and Ceramic Products

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 Es-tab.	No. of PE
Manufacture of clay pots, vases and other articles of clay	4,329	7,400	59	395	3	120	-	-
Manufacture of ceramic table-ware (Jugs, Mugs, Cups, Bowls, plates etc), toilet articles, statuettes and other o	57	104	3	33	3	108	-	-
Manufacture of porcelain table-ware (Jugs, Mugs, Cups, Bowls, plates etc), toilet articles, statuettes and other	13	16	3	24	2	276	2	1,762
Manufacture of electrical insulators and insulating fittings	5	8	2	18	1	58	1	250
Manufacture of other porcelain and ceramic products n.e.c.	9	16	3	23	-	-	1	250
Total	4,413	7,544	70	493	9	562	4	2,262

Source: Department of Census and Statistics

Table 11.15.5: Cutting, Shaping and Finishing of Stones

Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE
Cutting, shaping and finishing of stones for use on roads, Constructions as roofings, in Cemeteries etc.	55	130	35	327	11	565	-	-
Cutting ,shaping and finishing of monumental stones	103	179	15	125	2	212	-	-
Manufacture of stone furniture	60	75	1	12	-	-	-	-
Total	218	384	51	464	13	777	-	-

Source: Department of Census and Statistics

Table 11.15.6: Manufacture of Articles of Concrete, Cement and Plaster

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 Es-tab.	No. of PE
Manufacture of cement bricks, tiles, sheets, panels, door and window frames, posts, etc.	7,649	12,784	333	2,596	30	1,745	3	939
Manufacture of plaster articles	89	148	7	54	-	-	-	-
Manufacture of asbestos sheets (corrugated and other)	4	8	3	58	6	474	2	900
Manufacture of powdered mortar	2	6	2	30	-	-	-	-
Manufacture of cement statuary, furniture, vases and flower pots	2,265	3,420	62	452	2	58	-	-
Manufacture of ready mix and dry mix concrete and mortars	37	79	23	237	8	400	-	-
Manufacture of other cement based products n.e.c.	335	621	50	427	8	403	-	-
Total	10,381	17,066	480	3,854	54	3,080	5	1,839

Source: Department of Census and Statistics

Table 11.15.7: Manufacture of Non-metallic Mineral Products n.e.c

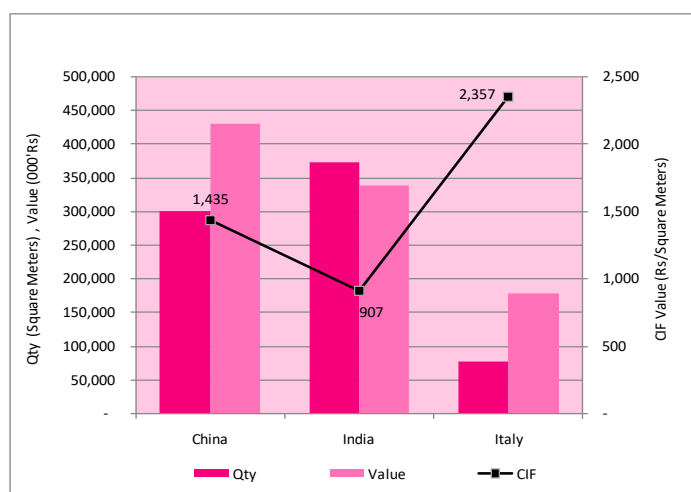
Industry	Micro		Small		Medium		Large	
	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE	No. of Es-tab.	No. of PE
Manufacture of millstones, abrasive products, other non-metallic mineral products	27	40	8	85	3	97	-	-
Metal Crushing	517	1,332	228	1,765	18	915	1	226
Total	544	1,372	236	1,850	21	1,012	1	226

Source: Department of Census and Statistics

Table 11.16: Ceramic, Porcelain, Tile & Granite Products Imports (2019-2021)

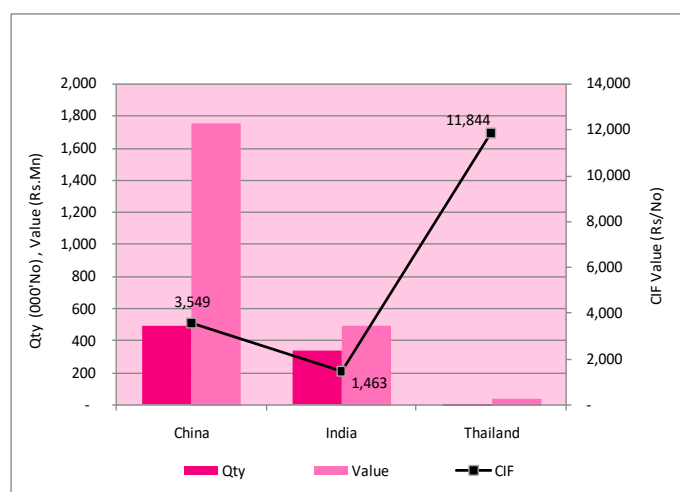
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Tiles (Floors & Walls) Sector	('000) Square Meters	15,923	10,533	5,542	3,837	809	1,085
Sanitary Ware Sector	('000) No	757	1,684	185	519	874	2,439
Table Ware Sector	MT	3,401	503	1,731	299	2,591	364
Ornamental Ware Sector	MT	298	173	186	135	161	255
Marble & Granite Sector	MT	14,805	1,003	6,911	1,344	8,638	662
Roofing Tiles Sector	MT	239	11	1	0.27	2	0.33
Glass & Glass ware	MT	33,244	6,648	28,931	5,830	27,561	7,201
Glass & Glass ware	('000) Square Meters	8,743	4,094	8,057	3,343	7,165	5,249
Total	MT	51,989	8,340	37,761	7,610	38,955	8,484
Total	('000) No	757	1,684	185	519	874	2,439
Total	('000) Square Meters	24,666	14,627	13,600	7,181	7,974	6,335
Grand Total			24,651		15,310		17,258

Source: Sri Lanka Customs



Source : Sri Lanka Customs

Figure 11.4: Major Imports Countries of Unglazed ceramic flags and paving, hearth or wall tiles; unglazed ceramic mosaic cubes and the like, whether or not on a backing - 2021



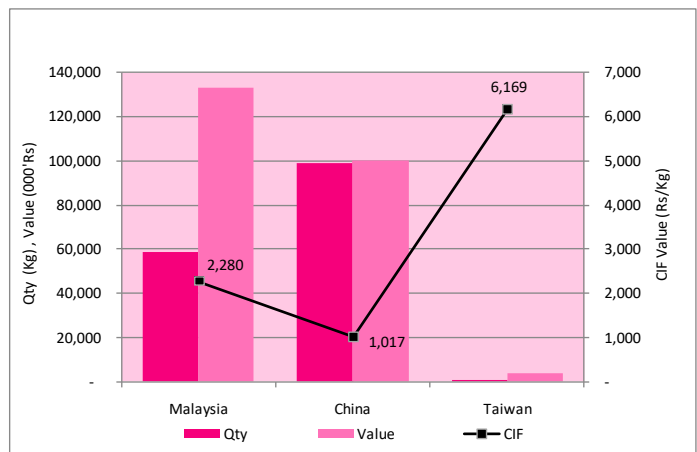
Source : Sri Lanka Customs

Figure 11.5: Major Imports Countries of Ceramic sinks, wash basins, wash basin pedestals, baths, bidets, water closet pans, flushing cisterns, urinals and similar sanitary fixtures - 2021



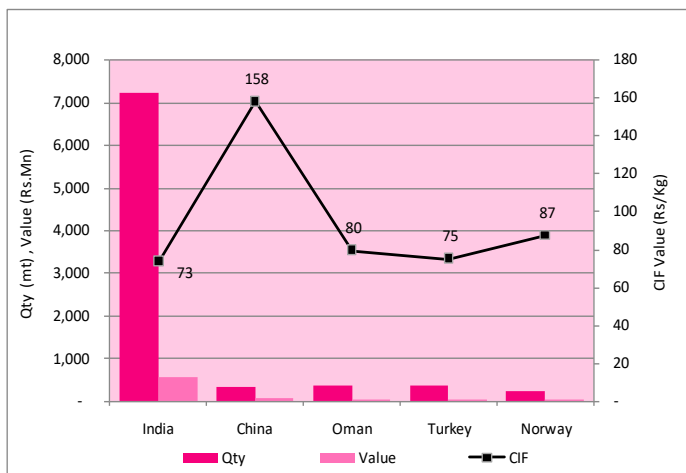
Source : Sri Lanka Customs

Figure 11.6: Major Imports Countries of Table Ware Sector - 2021



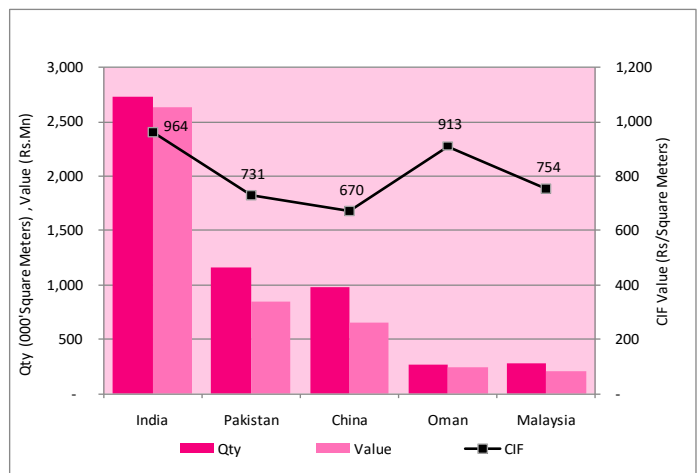
Source : Sri Lanka Customs

Figure 11.7: Major Imports Countries of Ornamental Ware Sector - 2021



Source : Sri Lanka Customs

Figure 11.8: Major Imports Countries of Marble & Granite Sector - 2021



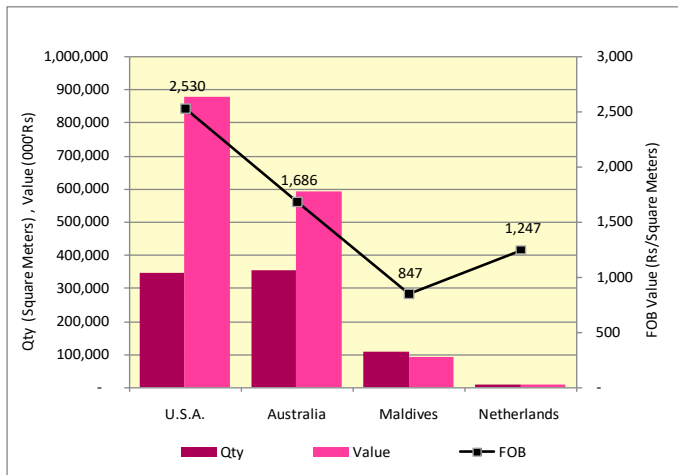
Source : Sri Lanka Customs

Figure 11.9: Major Imports Countries of Glass & Glass ware - 2021

Table 11.17: Ceramic, Porcelain, Tile & Granite Products Exports (2019-2021)

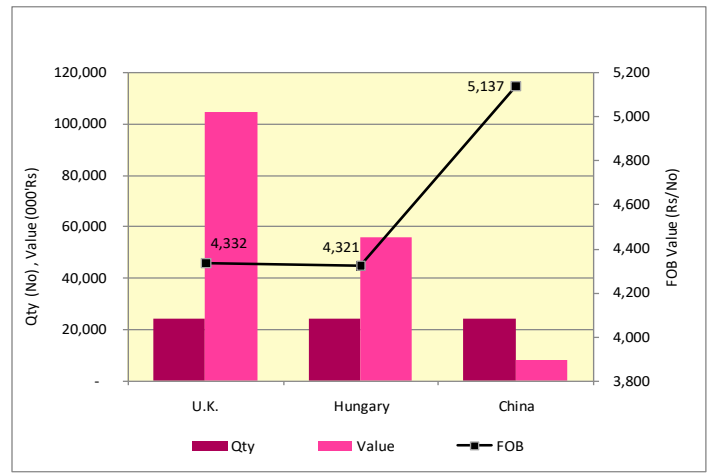
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Tiles (Floors & Walls) Sector	('000) Square Meters	616	851	553	914	819	1,582
Sanitary Ware Sector	('000) No	11	63	32	130	42	195
Table Ware Sector	MT	3,138	3,613	2,438	2,681	3,690	4,717
Ornamental Ware Sector	MT	496	730	387	614	448	784
Marble & Granite Sector	MT	18,211	599	10,688	373	11,196	438
Roofing Tiles Sector	MT	1,504	87	1,006	68	1,908	158
Glass & Glass ware	MT	40,412	3,345	33,398	2,881	37,495	4,199
Glass & Glass ware	('000) Square Meters	95	49	30	19	56	24
Total	MT	63,761	8,374	47,917	6,618	54,737	10,297
Total	('000) No	11	63	32	130	42	195
Total	('000) Square Meters	711	900	583	934	875	1,606
Grand Total			9,337		7,682		12,098

Source: Sri Lanka Customs



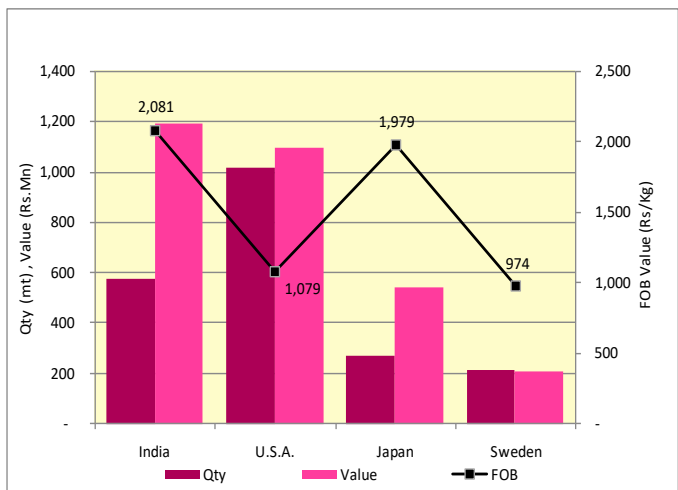
Source : Sri Lanka Customs

Figure 11.10: Major Exports Countries of Unglazed ceramic flags and paving, hearth or wall tiles; unglazed ceramic mosaic cubes and the like, whether or not on a backing - 2021



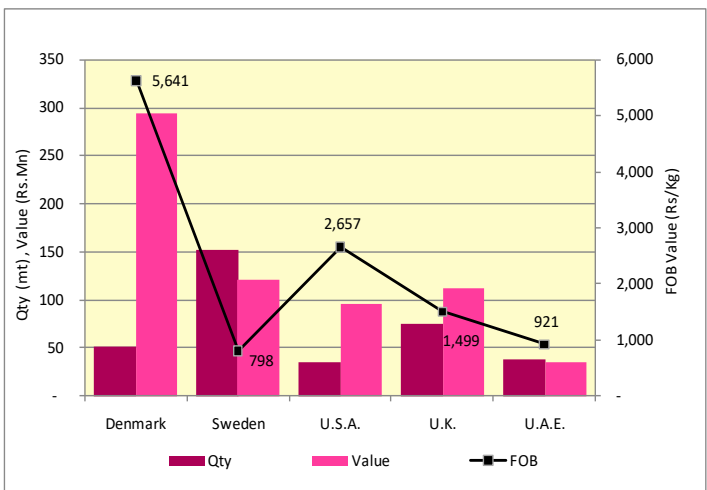
Source : Sri Lanka Customs

Figure 11.11: Major Exports Countries of Ceramic sinks, wash basins, wash basin pedestals, baths, bidets, water closet pans, flushing cisterns, urinals and similar sanitary fixtures - 2021



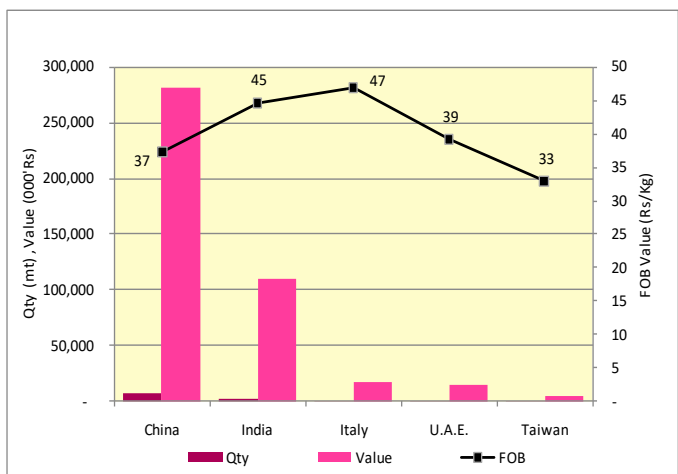
Source : Sri Lanka Customs

Figure 11.12: Major Exports Countries of Table Ware Sector - 2021



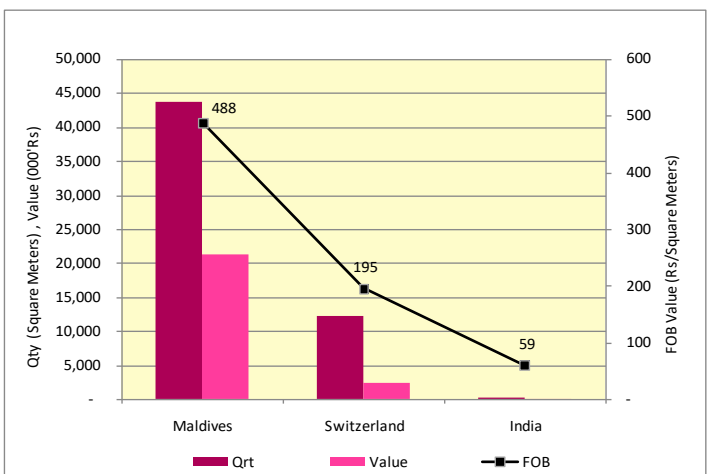
Source : Sri Lanka Customs

Figure 11.13: Major Exports Countries of Ornamental Ware Sector - 2021



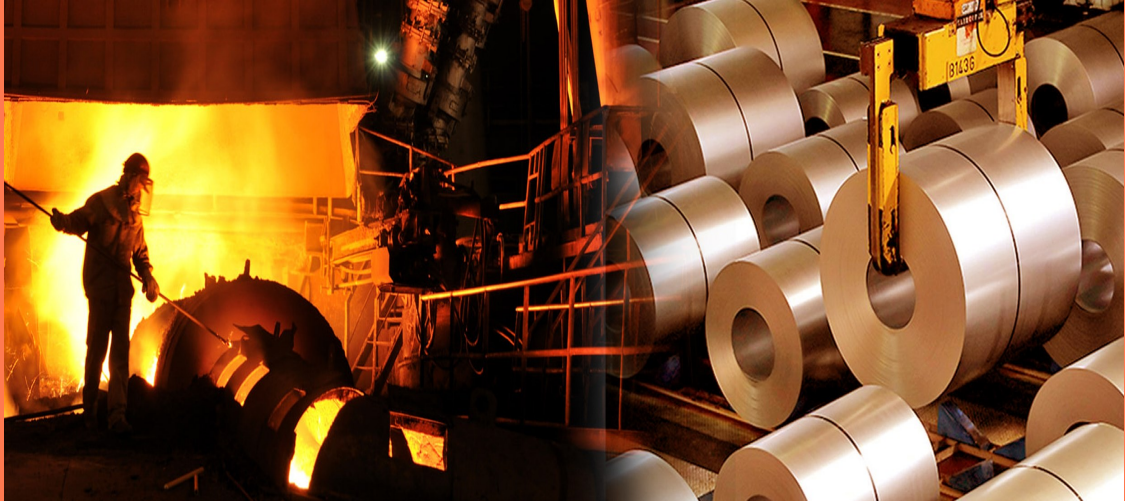
Source : Sri Lanka Customs

Figure 11.14: Major Exports Countries of Marble & Granite Sector - 2021



Source : Sri Lanka Customs

Figure 11.15: Major Exports Countries of Glass & Glass ware - 2021



12. METAL AND MACHINERY INDUSTRY

Overview

According to the survey conducted by the Industrial Development Board in the year 2020, there are more than 400 metal-related factories in the country. Copper scrap, Copper, Aluminum scrap, Aluminum, Brass scrap, Brass, Zinc scrap, Zinc, Stainless steel scrap, China scrap, Iron scrap, High carbon steel, Iron, Manganese metal and other metals both in scrap and pure form are used by small scale industrialists scattered in 21 districts as raw materials. Among these industrialists, 36% are scattered in Kandy district, 21% in Gampaha district and 15.6% in Colombo district.

In addition to the factories mentioned above, there are about 20 large-scale iron and brass-related manufacturing factories registered with the Ministry of Industry and the Sri Lanka Board of Investment. At present, direct employment in metal and steel manufacturing factories in Sri Lanka is approximately 80,000. Metal and steel manufacturing factories provide indirect employment of over 250,000.

After scrap metal export was banned in 2020 iron, aluminum and copper related industries were started using scrap metal. Currently, the metal, die and mold and machinery related manufacturing division of the Ministry of Industry provides services to 57 industries and the following sub-divisions.

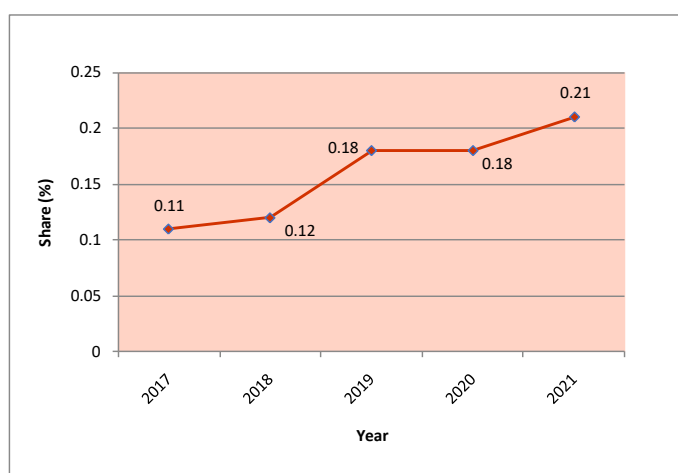
Sub Sector	Number of Industries	Direct Employment	Indirect Employment
Iron wire products using billet (Extrusion)	2	800	20,000
Wire or strip products using scrap wire	3	400	20,000
g. i. Pipe and box bar products	1	100	300
Manufacture of iron nails	2	500	1,700
Brass related products	9	1,500	7,000
Aluminum Extrusion Products	3	14,000	75,000
Aluminum kitchen appliances and other	9	7,200	15,000
Copper products (wire drawing)	3	1,000	4,000
Machinery Factories	9	6,000	10,000
Dies and molds	9	200	800
Other Factories	3	600	1,800

12.1. METAL INDUSTRY

Table 12.1.1: Manufacture of Basic Metal Products Industry Contributions to the GDP at Current and Constant Market Price (2017-2021)

Year	Current		Constant	
	Contribution Value (Rs. Mn)	Share (%) of Total Current GDP	Contribution Value (Rs. Mn)	Share (%) of Total Constant GDP
2017	14,339	0.11	7,926	0.08
2018	16,608	0.12	8,774	0.09
2019	27,478	0.18	8,180	0.08
2020	27,719	0.18	7,996	0.08
2021	35,475	0.21	8,651	0.09

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 12.1.1: The Contribution of the Metal Industry Sector to the share of the Manufacturing Industry to the GDP

Table 12.1.2: Manufacturing Establishments and Number of Persons Engaged of Metal Industry(2015-2018)

Year	Establishments less than 25 persons engaged		Establishments 25 or more persons engaged	
	No of Establishments	Persons engaged	No of Establishments	Persons engaged
2015	12	111	15	1,750
2016	11	82	17	1,920
2017	12	92	20	2,349
2018	9	74	16	1,978
2019	-	-	23	2,623

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

Table 12.1.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Metal Industry (2015) — Establishments with 5 or more persons engaged

2015								
Size	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	7	52	41	8,660,525	23,028,991	7,441,787	15,587,204	965,352
10 to 99	13	741	731	519,984,112	8,086,823,138	5,072,619,356	3,014,203,782	194,469,544
100 & above	7	1,068	1,068	663,770,935	32,129,799,893	28,944,923,272	3,184,876,620	543,363,416
Group total	27	1,861	1,840	1,192,415,572	40,239,652,022	34,024,984,415	6,214,667,606	738,798,312

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

Table 12.1.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Metal Industry (2016) — Establishments with 5 or more persons engaged

2016								
Size	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	11	82	70	15,704,085	46,989,507	20,082,515	26,906,992	1,335,000
10 to 99	6	465	465	375,948,213	4,617,648,084	3,568,360,486	1,049,287,598	121,106,496
100 & above	11	1,455	1,455	753,275,034	32,980,525,294	26,235,486,613	6,745,038,681	133,531,027
Group total	28	2,002	1,990	1,144,927,332	37,645,162,885	29,823,929,614	7,821,233,271	255,972,523

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

Table 12.1.5: Principal Indicators of Industrial Activity classified by industry division & persons engaged size class of Metal Industry (2017) — Establishments with 5 or more persons engaged

2017								
Size	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	12	92	76	18,123,767	47,062,270	17,838,269	29,224,002	735,000
10 to 99	6	288	288	164,510,061	1,098,538,404	530,339,709	568,198,695	49,905,567
100 & above	14	2,055	2,055	1,008,358,710	46,835,196,826	38,112,266,533	8,722,930,293	402,087,550
Group total	32	2,435	2,419	1,190,992,538	47,980,797,500	38,660,444,511	9,320,352,990	452,728,117

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

Table 12.1.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Metal Industry (2018) — Establishments with 5 or more persons engaged

2018								
Size	No of establishments	Persons engaged	Employ-ees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	9	74	62	11,351,528	20,069,785	5,633,846	14,435,939	-
10 to 99	5	227	227	129,470,066	888,164,171	369,738,385	518,425,786	39,275,878
100 & above	11	1,751	1,751	1,282,421,805	53,431,167,519	43,405,185,089	10,025,982,429	987,652,526
Group total	25	2,052	2,040	1,423,243,399	54,339,401,475	43,780,557,320	10,558,844,154	1,026,928,404

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

Table 12.1.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of Metal Industry (2019) — Establishments with 5 or more persons engaged

2019								
Size	No of establishments	Persons engaged	Employ-ees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	-	-	-	-	-	-	-	-
10 to 99	5	261	259	96,077,793	1,041,007,356	694,113,231	346,894,124	39,991,191
100 & above	18	2,362	2,341	1,334,719,210	50,482,094,539	41,038,499,418	9,443,595,121	1,269,989,809
Group total	23	2,623	2,600	1,430,797,003	51,523,101,895	41,732,612,649	9,790,489,245	1,309,981,000

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

Table 12.1.8: Manufacturing of Rubber and Plastic Products Per Head Labour Productivity

Year	Per head La-bour cost	Per head La-bour Produc-tivity	Labour Cost to productivity ratio
2015	648,052	3,377,537	5.21
2016	575,340	3,930,268	6.83
2017	492,349	3,852,978	7.83
2018	697,668	5,175,904	7.42
2019	550,307	3,765,573	6.84

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

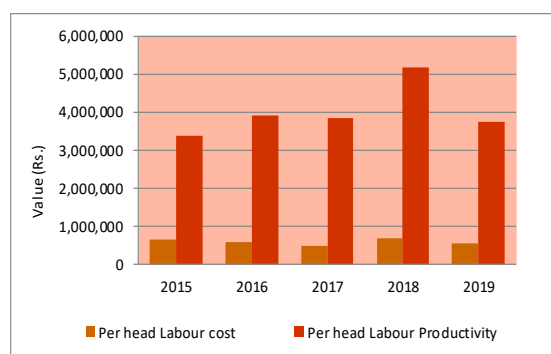


Figure 12.1.2: Manufacturing of Rubber and Plastic Products Per Head Labour Productivity

Table 12.1.9: Value of Output & Output Components Classified by Metal 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	40,159,451,156	39,531,502,137	(78,177,331)	706,126,350
2016	37,598,173,378	37,119,981,865	83,009,061	395,182,452
2017	47,933,735,230	47,129,973,766	552,238,143	251,523,321
2018	54,319,331,690	53,590,462,192	208,022,519	520,846,979
2019	51,523,101,895	50,558,601,582	473,755,979	490,744,333

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

Table 12.1.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Metal 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	33,970,864,598	33,493,019,005	273,060,779	204,784,813
2016	29,803,847,099	29,324,501,167	230,953,363	248,392,569
2017	38,642,606,242	37,572,048,333	760,373,233	310,184,676
2018	43,774,923,474	42,547,828,062	772,363,003	454,732,410
2019	41,732,612,649	40,086,914,047	940,724,878	704,973,725

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

Table 12.1.11: Employment by Nature of Employment & Gender Classified by Industry Division of Metal Industry - 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	-	-	-	-	933	398	373	45	1,306	443
2016	-	-	-	-	1,138	384	371	27	1,509	411
2017	-	-	-	-	1,420	384	476	63	1,896	447
2018	-	-	-	-	1,253	259	366	100	1,620	359
2019	23	-	-	-	1,873	-	609	118	2,505	118

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

Table 12.1.12: Economic Indicators of Industrial Activity Classified by Industry Class of Metal 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	
	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons	Less than 25 persons	25 or more persons
2015	720,907	43,693,517	1.482	2.700	0.882	41.952	234,436	7,174,350	0.482	0.700	0.287	5.973
2016	573,043	39,933,108	2.340	2.559	1.560	73.463	328,134	8,264,087	1.340	0.559	0.893	14.888
2017	511,881	44,950,703	2.636	2.475	1.649	73.833	317,860	2,677,298	1.638	0.475	1.024	14.672
2018	271,213	70,608,942	3.562	4.359	0.885	88.189	195,080	16,057,503	2.562	1.359	0.636	25.332

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

Table 12.1.13: Categories of Employees by Nature of Employment Classified by Metal Industry (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	1,750	1,054	278
2016	1,920	1,216	306
2017	2,343	1,534	270
2018	1,978	1,316	196

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

Table 12.1.14: Number of Metal Products Manufacturing Industries and Engaged Persons in Sri Lanka (2013/14 Economic Census)

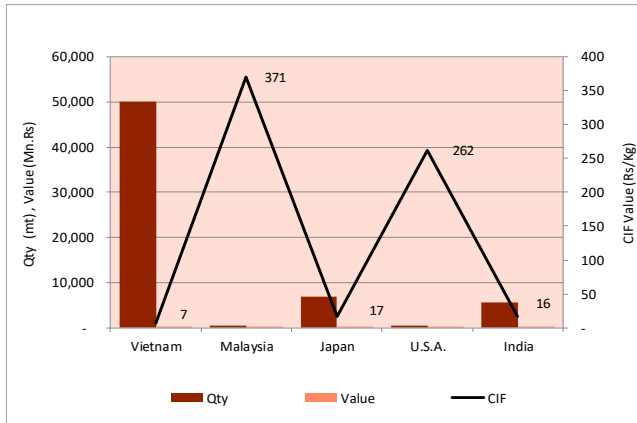
Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of basic iron and	97	144	9	68	9	738	2	660
Manufacture of basic precious and other non-ferrous metals	45	78	8	65	2	104	0	
Casting of iron and steel	193	282	6	71	0	0	0	0
Casting of non-ferrous metals	67	122	6	39	0	0	0	0
Total	402	626	29	243	11	842	2	660

Source : Department of Census and Statistics

Table 12.1.15: Metal Imports (2019-2021)

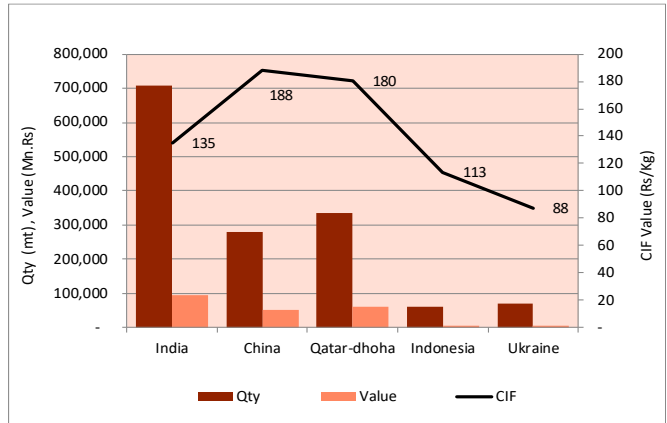
Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Ores, slag and ash	MT	58,042	537	201,621	1,101	65,807	984
Iron and Steel	MT	1,133,165	117,936	945,660	100,812	1,385,633	202,525
Articles of iron or steel	MT	238,230	94,651	175,787	91,411	165,215	68,970
Copper and articles thereof	MT	16,899	18,717	14,484	17,169	15,177	27,187
Nickle & articles thereof	MT	11	106	6	59	12	97
Aluminium and articles thereof	MT	55,352	26,171	41,763	19,055	57,701	32,041
Lead & articles thereof	MT	8,629	3,731	8,020	3,228	7,675	3,960
Zinc & articles thereof	MT	6,385	2,735	6,016	2,393	5,827	3,245
Tin & articles thereof	MT	72	278	60	220	69	399
Other base metals; cer-mets; articles thereof	MT	54	282	46	187	67	325
Tools, implements, cutlery, spoons & forks of base metal; parts thereof of base metal	MT	125,045	8,030	167,519	6,172	174,905	10,134
Miscellaneous articles of base metal	MT	22,795	15,780	20,321	12,882	22,821	17,017
Total	MT	1,606,646	288,423	1,379,687	253,594	1,835,108	365,906

Source: Sri Lanka Customs



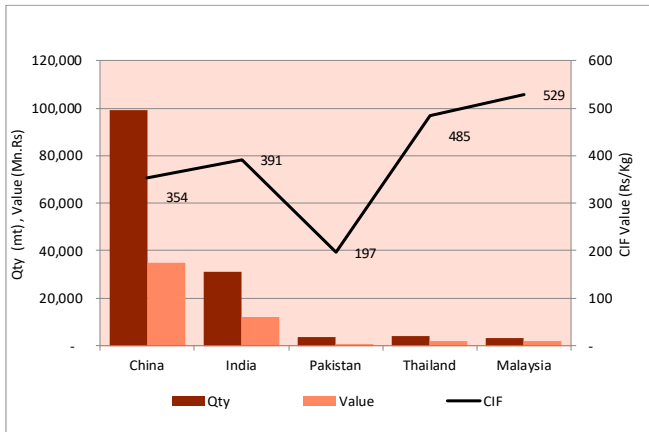
Source : Sri Lanka Customs

Figure 12.1.3: Major Imports Countries of Ores Slag and Ash - 2021



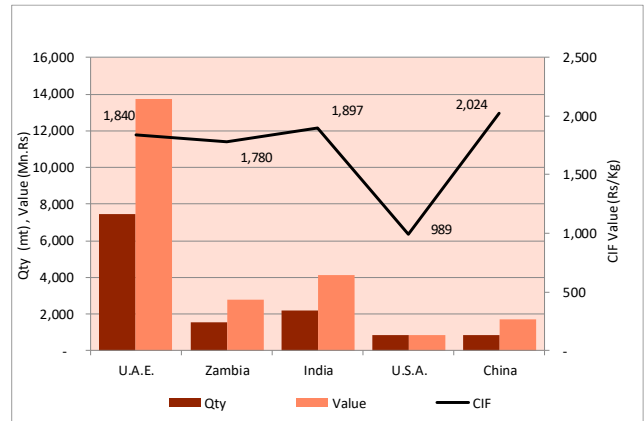
Source : Sri Lanka Customs

Figure 12.1.4: Major Imports Countries of Iron and Steel - 2021



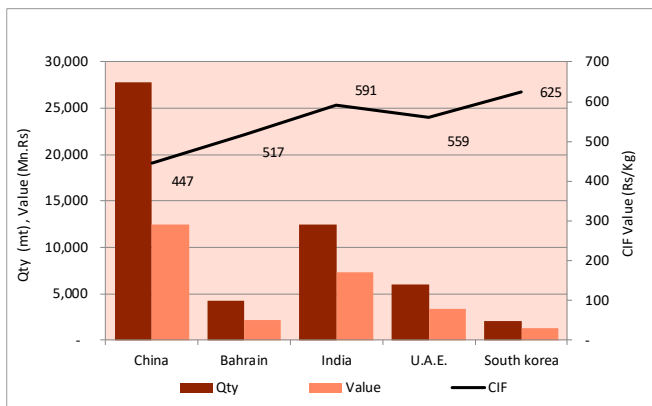
Source : Sri Lanka Customs

Figure 12.1.5: Major Imports Countries of Articles of Iron or Steel - 2021



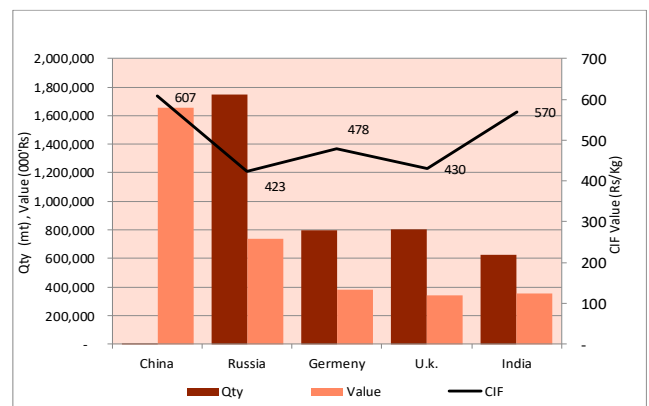
Source : Sri Lanka Customs

Figure 12.1.6: Major Imports Countries of Articles of Copper and Articles thereof - 2021



Source : Sri Lanka Customs

Figure 12.1.7: Major Imports Countries of Articles of Aluminium and Articles thereof - 2021



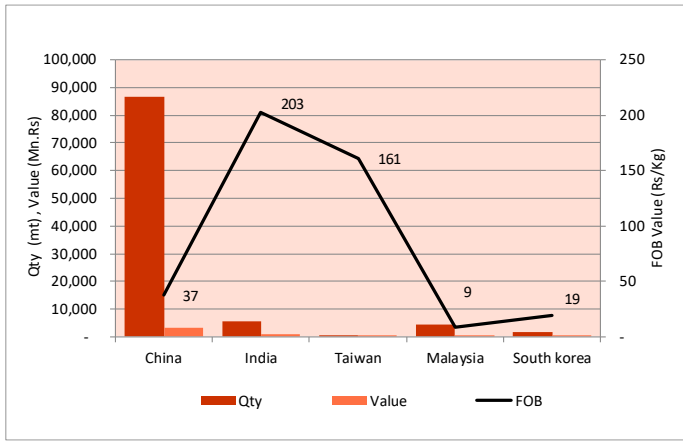
Source : Sri Lanka Customs

Figure 12.1.8: Major Imports Countries of Articles of Lead & Articles thereof - 2021

Table 12.1.16: Metal Exports (2019-2021)

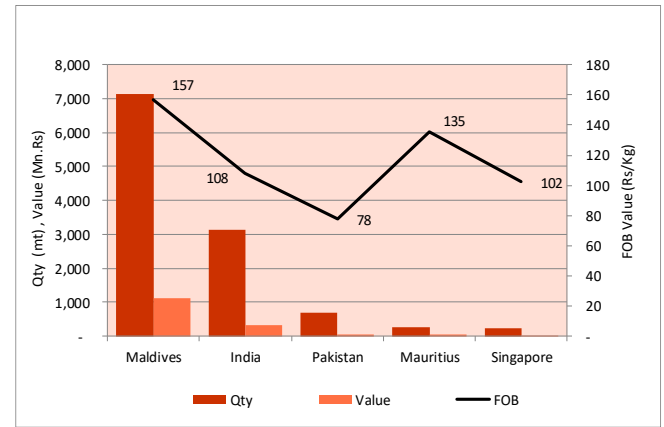
Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Ores, slag and ash	MT	56,840	2,763	25,329	1,585	93,235	4,530
Iron and Steel	MT	15,671	1,574	13,335	1,100	11,570	1,607
Articles of iron or steel	MT	37,055	10,494	32,078	7,529	36,823	11,364
Articles of iron or steel (Qty - No)	('000) No	0.3	5	0.262	10	0.81	11
Copper and articles thereof	Kg	4,482	4,343	2,663	2,419	1,855	2,260
Nickle & articles thereof	Kg	0.7	0.5	0.005	0.18	0.343	0.52
Aluminium and articles thereof	Kg	11,782	8,376	7,232	4,826	9,353	9,070
Lead & articles thereof	Kg	7,088	2,619	4,124	1,459	7,219	3,071
Zinc & articles thereof	MT	489	146	459	125	444	130
Tin & articles thereof	MT	1	2	1	2	-	-
Other base metals; cermets; articles thereof	MT	44	9	1	2	22	6
Tools, implements, cutlery, spoons & forks of base metal; parts thereof of base metal	MT	3,996	1,601	25,042	1,168	68,280	1,186
Miscellaneous articles of base metal	MT	1,797	2,373	1,449	1,886	898	2,255
Total	No	0.3	5	0.262	10	0.81	11
Total	MT	139,250	34,305	111,717	22,109	229,703	35,484
Grand Total			34,310		22,119		35,495

Source: Sri Lanka Customs



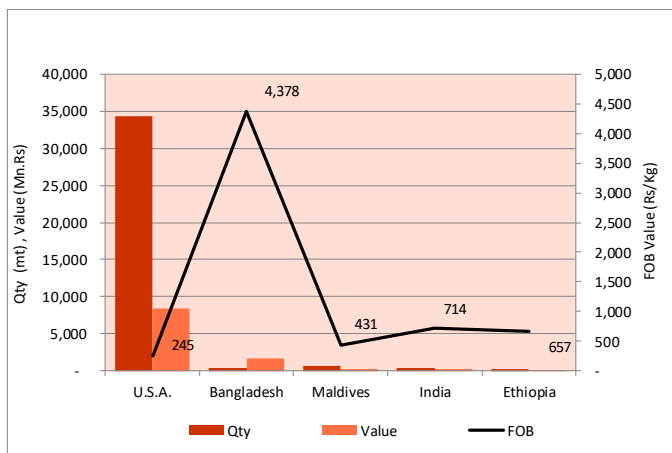
Source : Sri Lanka Customs

Figure 12.1.9: Major Exports Countries of Ores Slag and Ash - 2021



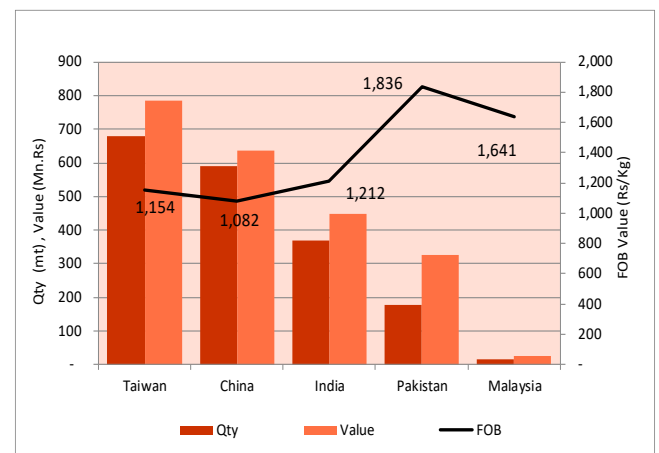
Source : Sri Lanka Customs

Figure 12.1.10: Major Exports Countries of Iron and Steel—2021



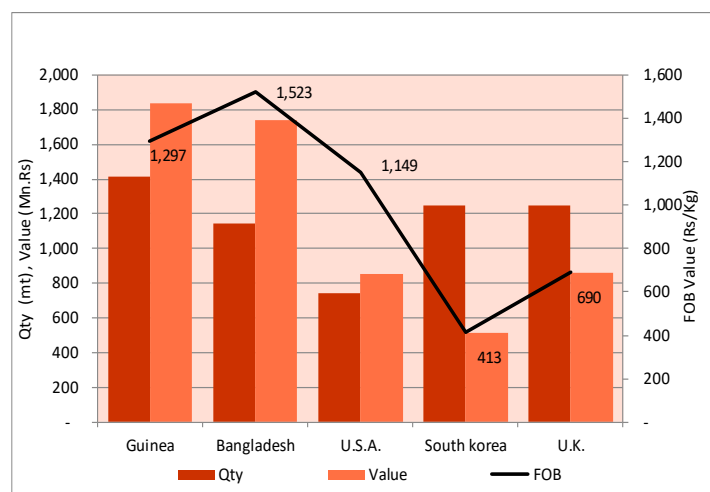
Source : Sri Lanka Customs

Figure 12.1.11: Major Exports Countries of Articles of Iron or Steel - 2021



Source : Sri Lanka Customs

Figure 12.1.12: Major Exports Countries of Articles of Copper and Articles thereof - 2021



Source : Sri Lanka Customs

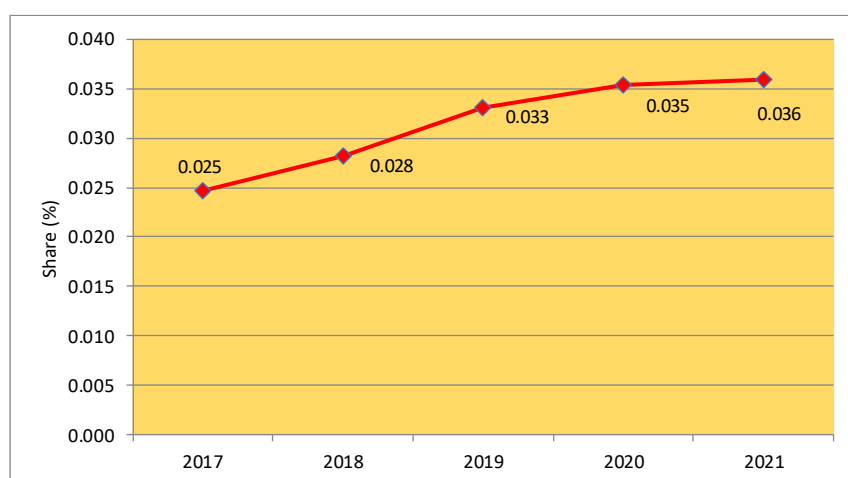
Figure 12.1.13: Major Exports Countries of Articles of Aluminium and Articles thereof - 2021

12.2 MACHINERY INDUSTRY

Table 12.2.1: Manufacture of Machinery Industry contribution to the GDP at Current and Constant Market Price (2015 - 2021)

Year	Current market price		Constant market price	
	contribution Value (Rs.Mn)	Share (%) of Total Current GDP	contribution Value (Rs.Mn)	Share (%) of Total Constant GDP
2017	3,291.73	0.025	3,254.64	0.035
2018	4,033.31	0.028	3,424.95	0.035
2019	4,966.89	0.033	3,528.35	0.036
2020	5,325.41	0.035	3,460.48	0.036
2021	6,044.92	0.036	3,830.37	0.039

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 12.2.1: The Contribution of the Machinery Industry sector to the share of the manufacturing industry to the GDP

Table 12.2.2: Manufacturing Establishments and Number of Persons Engaged of Machinery 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	16	203	5	631
2016	56	509	7	1,017
2017	57	586	20	1,612
2018	38	471	18	2,027
2019	44	490	23	2,513

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

**Table 12.2.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size of Machinery Industry (2015) (Establishments with 5 or more persons engaged)**

2015								
Size	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	6	38	26	5,699,600	23,674,111	12,033,538	11,640,573	1,436,300
10 to 99	12	235	217	55,198,330	388,101,787	166,270,936	221,830,851	42,939,674
100 & above	3	561	558	272,075,460	2,248,017,825	1,087,267,987	1,160,749,838	115,390,522
Group total	21	834	801	332,973,390	2,659,793,723	1,265,572,461	1,394,221,262	159,766,496

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

**Table 12.2.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size of Machinery Industry (2016) (Establishments with 5 or more persons engaged)**

2016								
Size	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	35	200	157	43,302,000	145,714,360	93,355,161	52,359,199	1,475,000
10 to 99	23	368	344	98,083,301	617,632,592	360,715,962	256,916,630	4,359,926
100 & above	5	958	957	428,894,896	4,895,941,291	3,490,819,540	1,405,121,751	149,548,618
Group total	63	1526	1458	570,280,197	5,659,288,243	3,944,890,663	1,714,397,580	155,383,544

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

**Table 12.2.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size of Machinery Industry (2017) (Establishments with 5 or more persons engaged)**

2017								
Size	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	28	146	87	30,402,400	113,008,800	72,710,730	40,298,070	789,400
10 to 99	43	822	758	219,710,397	1,232,607,177	700,650,125	531,957,052	26,668,598
100 & above	6	1,230	1,229	651,870,037	7,341,842,055	5,388,750,571	1,953,091,484	660,244,803
Group total	77	2,198	2,074	901,982,834	8,687,458,032	6,162,111,426	2,525,346,606	687,702,801

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

Table 12.2.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Machinery Industry (2018) (Establishments with 5 or more persons engaged)

2018								
Size	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	15	87	65	21,424,873	165,462,667	121,180,097	44,282,570	1,087,974
10 to 99	35	722	669	162,718,504	741,416,038	366,453,607	374,962,431	52,655,465
100 & above	7	1,689	1,683	974,634,749	8,923,375,899	6,288,919,428	2,634,456,471	370,812,395
Group total	57	2,498	2,417	1,158,778,126	9,830,254,604	6,776,553,132	3,053,701,472	424,555,834

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

Table 12.2.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size of Machinery Industry (2019) (Establishments with 5 or more persons engaged)

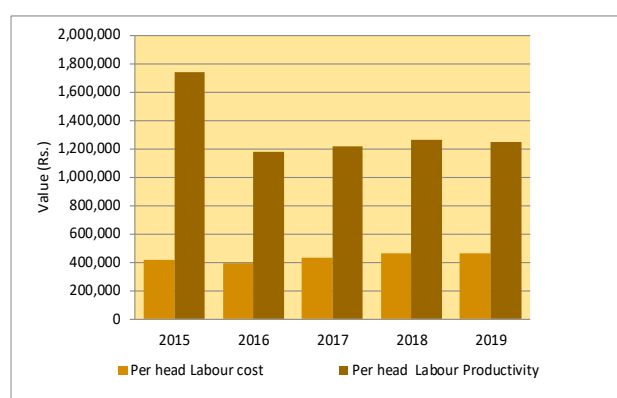
2019								
Size	No of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	18	107	64	30,404,021	240,378,117	146,682,564	93,695,553	664,873
10 to 99	40	902	868	290,875,663	1,291,635,197	667,882,570	623,752,627	58,797,185
100 & above	9	1,994	1,986	1,018,784,889	9,094,097,596	6,170,707,698	2,923,389,899	243,704,545
Group total	67	3,003	2,918	1,340,064,573	10,626,110,910	6,985,272,832	3,640,838,079	303,166,603

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

Table 12.2.8: Manufacturing of Machinery Industry Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	415,697	1,740,601	4.19
2016	391,139	1,175,856	3.01
2017	434,900	1,217,621	2.80
2018	459,241	1,263,426	2.75
2019	459,241	1,247,717	2.72

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



Source : Department of Census and Statistics

Figure 12.2.2: Manufacturing of Machinery Industry Per Head Labour Productivity

**Table 12.2.9: Categories of Employees by Nature of Employment Classified by Machinery industry
(Establishments with 25 or more persons engaged)**

Year	Output (Rs.)	Shipped (Rs)/ prod- ucts moved of the establishment (Rs.)	Change in Stocks (Rs.)	Industrial ser- vices & other revenue (Rs.)
2015	732,689,210	199,642,797	-15,971,496	549,017,909
2016	4,984,607,873	5,014,968,270	-38,235,398	7,875,001
2017	7,760,110,682	7,785,739,986	-83,763,246	58,133,942
2018	9,431,738,906	6,877,669,688	-195,608,426	2,749,677,644
2019	10,095,187,600	7,566,656,250	-111,121,145	2,639,652,496

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

**Table 12.2.10: Value of Intermediate Consumptions & Intermediate Consumptions Components
Classified by Machinery Industry**

(Establishments with 25 or more persons engaged)

Year	Intermediate con- sumption (Rs.)	Raw materials con- sumed (Rs.)	Cost of industrial services done by others & other payments (Rs.)	Electricity & fuel con- sumed (Rs.)
2015	1,135,877,061	939,667,637	145,761,515	50,447,909
2016	3,547,556,933	3,272,258,014	197,602,696	77,696,223
2017	5,650,293,993	4,179,399,235	1,372,740,360	98,154,398
2018	6,513,890,906	4,828,639,110	1,563,341,028	121,910,768
2019	6,652,071,873	5,080,354,141	1,452,911,881	118,805,852

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

**Table 12.2.11: Employment by Nature of Employment & Gender Classified by Industry Division of Ma-
chinery Industry - 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	5	2	-	-	410	53	144	17	559	72
2016	3	2	-	-	737	59	179	37	919	98
2017	23	3	10	-	1,158	86	283	49	1,474	138
2018	16	2	3	1	1,450	118	373	63	1,843	184
2019	13	2	-	-	1,797	85	526	89	2,336	176

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

Table 12.2.12: Categories of Employees by Nature of Employment Classified by Machinery industry (Establishments with 25 or more persons engaged)

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	624	392	71
2016	1,012	625	171
2017	1,576	934	310
2018	2,004	1,278	291
2019	2,498	1,560	322

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

**Table 12.2.13: Economic Indicators of Industrial Activity Classified by Machinery Industry Class
(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	1,595,191	2.497	1.420	956,297	1.497	0.851
2016	1,325,502	1.698	0.739	544,885	0.698	0.304
2017	1,581,478	1.812	1.055	708,636	0.812	0.473
2018	846,106	1.517	0.716	288,436	0.517	0.244
2019	1,084,247	1.593	1.207	403,787	0.593	0.449

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

**Table 12.2.14: Economic Indicators of Industrial Activity Classified by Industry Class
(Establishments with 25 or more persons engaged)**

Table 12.2.14.1: Manufacture of general purpose machinery

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	6,597,863	2.357	2.463	3,798,141	1.357	1.418
2016	8,483,915	1.389	2.842	2,375,496	0.389	0.796
2017	8,420,544	1.360	2.794	3,013,473	0.360	0.740
2018	5,911,275	1.482	3.088	1,922,781	0.482	1.004
2019	6,436,329	1.503	4.471	2,153,180	0.503	1.496

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

Table 12.2.14.2: Manufacture of special-purpose machinery

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	1,773,908	1.477	2.268	572,865	0.477	0.732
2017	1,424,388	1.451	1.859	766,048	0.451	0.578
2018	3,006,473	1.367	3.237	807,030	0.367	0.869
2019	2,046,276	1.557	2.839	732,158	0.557	1.016

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

Table 12.2.15: Number of Machinery Industries and Engaged Persons in Sri Lanka

(2013/14 Economic Census)

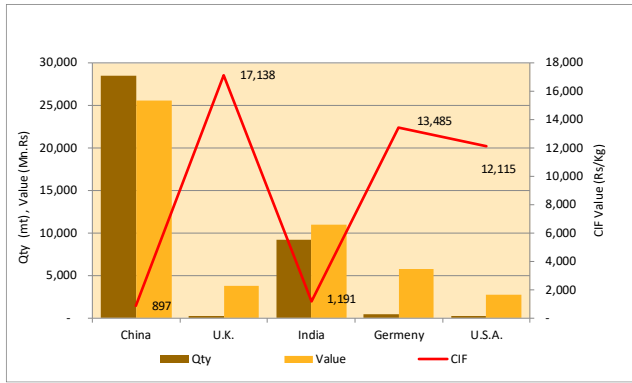
Industry	Micro		Small		Medium		Large	
	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE
Manufacture of general purpose machinery	29	62	16	179	7	377	2	783
Manufacture of general purpose machinery	113	223	46	482	12	1088	3	1156
Total	142	285	62	661	19	1465	5	1939

Source: Department of Census and Statistics

Table 12.2.16: Imports of Machinery and Mechanical appliance (2019 - 2021)

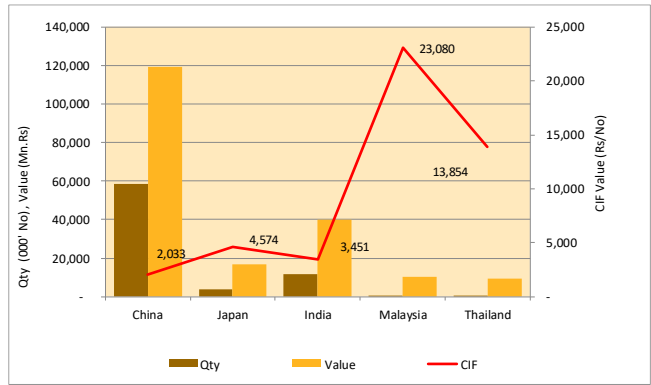
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Neuclear reactors, boilers, machinery and mechanical appliances, parts thereof.	MT	41,522	53,365	34,563	49,015	46,111	70,312
Neuclear reactors, boilers, machinery and mechanical appliances, parts thereof.	('000)No	67,994	202,902	64,072	182,923	83,094	269,640
Total	MT	41,522	53,365	34,563	49,015	46,111	70,312
Total	('000)No	67,994	202,902	64,072	182,923	83,094	269,640
Grand Total			256,267		231,938		339,952

Source: Sri Lanka Customs



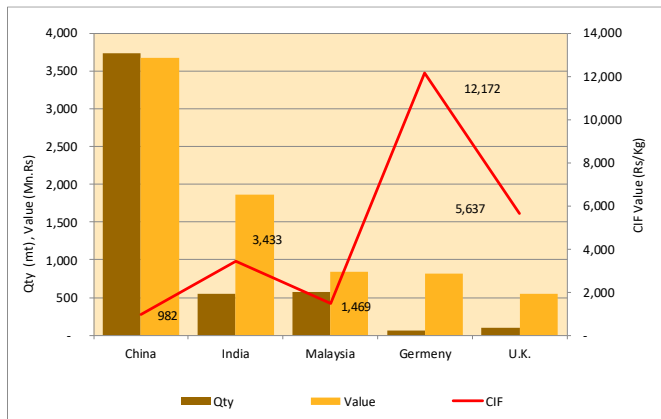
Source : Sri Lanka Customs

Figure 12.2.3: Major Imports Countries of Nuclear reactors, boilers, machinery and mechanical appliances, parts thereof - 2021



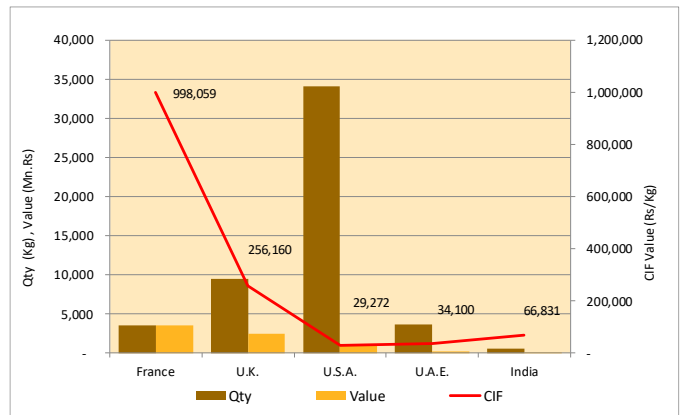
Source : Sri Lanka Customs

Figure 12.2.4: Major Imports Countries of Nuclear reactors, boilers, machinery and mechanical appliances, parts thereof - 2021



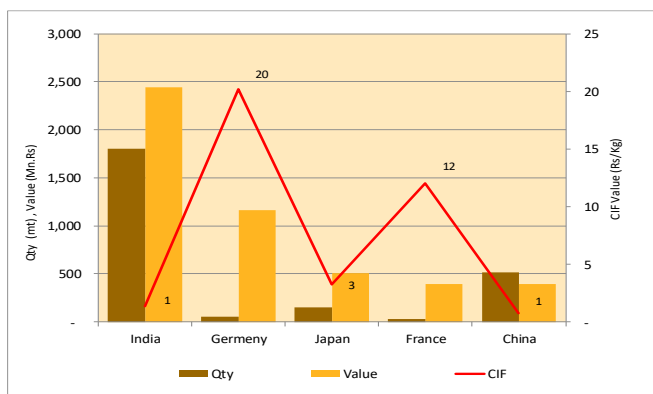
Source : Sri Lanka Customs

Figure 12.2.5: Major Imports Countries of Taps, cocks, valves and similar appliances for pipes, boiler shells, tanks, vats or the like, including pressure-reducing valves and thermostatically controlled valves - 2021



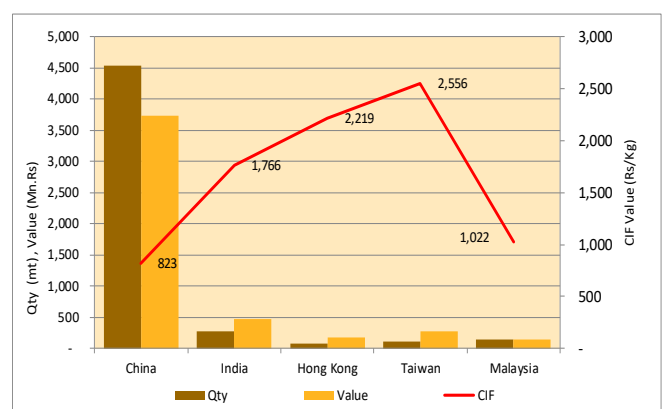
Source : Sri Lanka Customs

Figure 12.2.6: Major Imports Countries of Turbo-jets, turbo-propellers and other gas turbines - 2021



Source : Sri Lanka Customs

Figure 12.2.7: Major Imports Countries of Parts suitable for use solely or principally with the engines of heading -2021



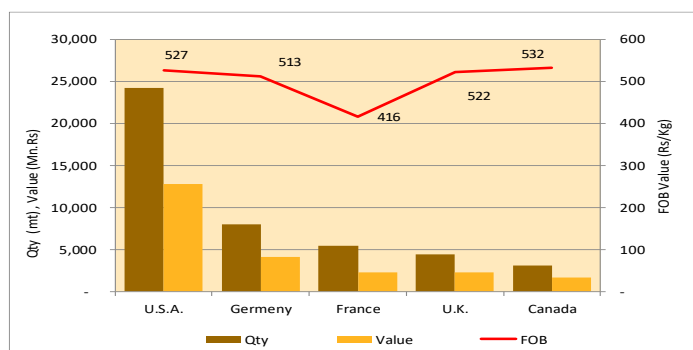
Source : Sri Lanka Customs

Figure 12.2.8: Major Imports Countries of Moulding boxes for metal foundry; mould bases; moulding patterns; moulds for metal (other than ingot moulds), metal carbides, glass, mineral materials, rubber or plastics.—2021

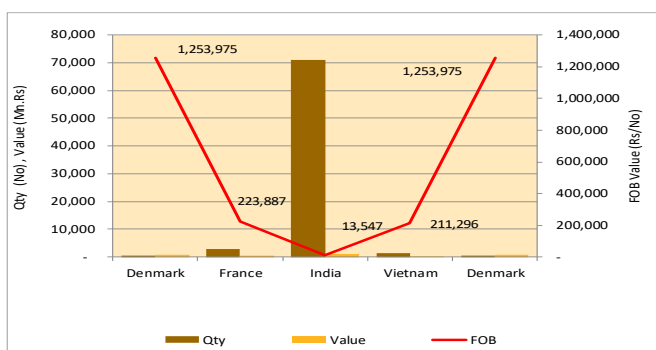
Table 12.2.17: Exports of Machinery and Mechanical appliance (2019 - 2021)

Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Neuclear reactors, boilers, machinery and mechanical appliances, parts thereof.	MT	27,996	14,114	21,315	12,333	56,016	29,659
Neuclear reactors, boilers, machinery and mechanical appliances, parts thereof.	('000)No	247	4,144	204	4,341	136	4,927
Total	MT	27,996	14,114	21,315	12,333	56,016	29,659
Total	('000)No	247	4,144	204	4,341	136	4,927
Grand Total			18,258		16,674		34,586

Source: Sri Lanka Customs



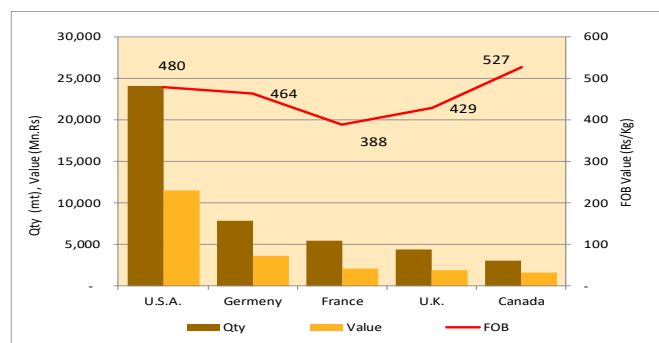
Source : Sri Lanka Customs



Source : Sri Lanka Customs

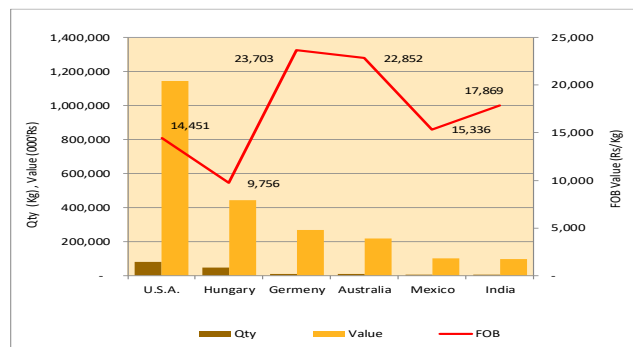
Figure 12.2.9: Major Exports Countries of Neuclear reactors, boilers, machinery and mechanical appliances, parts thereof - 2021

Figure 12.2.10: Major Exports Countries of Neuclear reactors, boilers, machinery and mechanical appliances, parts thereof - 2021



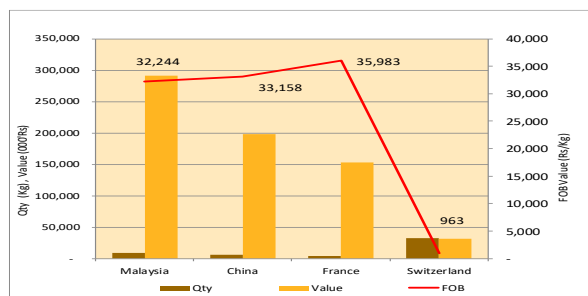
Source : Sri Lanka Customs

Figure 12.2.11: Major Exports Countries of Taps, cocks, valves and similar appliances for pipes, boiler shells, tanks, vats or the like, including pressure-reducing valves and thermostatically controlled valves - 2021



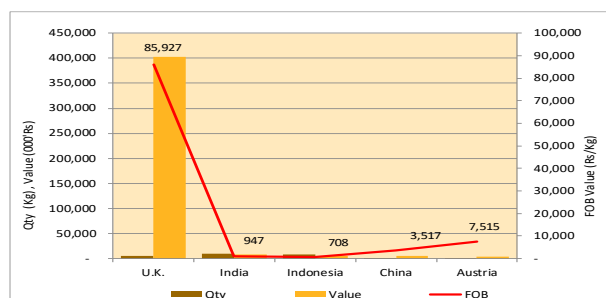
Source : Sri Lanka Customs

Figure 12.2.12: Major Exports Countries of Weighing machinery -2021



Source : Sri Lanka Customs

Figure 12.2.13: Major Exports Countries of Parts suitable for use solely or principally with the engines of heading -2021



Source : Sri Lanka Customs

Figure 12.2.14: Major Exports Countries of Moulding boxes for metal foundry; mould bases; moulding patterns; moulds for metal (other than ingot moulds), metal car-bides, glass, mineral materials, rubber or plastics. -2021



13. AUTOMOBILE INDUSTRY

Overview

The automobile sector in Sri Lanka consist of the two main subsectors, the component manufacturing sector and automobile manufacturing/assembly sector. At present the sector is strengthened with 15 domestically Value-Added Automobile Assembling Industries, 25 Ministry Registered Domestically Value-Added Auto Mobile Components Manufactures and 06 Locally Assembled World-Renowned Brands. The industry provides employment for about 20,000 direct employments.

Automobile sector imports accounts for USD 422 million in 2021. The imports have been declined by around 30% compared to imports in 2021, from USD 603 million recorded in 2020, due to the measures taken by the government to temporary suspend the vehicle imports. Total value of automobile sector exports stands at USD 91 million by the end of 2021.

The Automobile Assembling Industry has been continuing in Sri Lanka for the last 20 years. Regarding the cabinet decisions dated 2004.07.28 and subsequently, 2008.08.27, the Cabinet of Ministers decided to provide tax and tariff relief, formulate regulations and control mechanisms for this industry. The Automobile assembling companies enjoy excise duty concession on domestic value addition.

The component manufacturing sector has been recognized as key sectors with the potential to be developed and promoted in the international market by linking with the Global Value Chains. The sector involves in manufacturing Tyres, Batteries, Rubber components including bushes, Exhausts systems, Seats & seating components, Radiators, Bumpers, Body interior parts, Centre consoles, HVAC systems, Complete dashboard systems, steering racks including conversion kits, Cables, Wire harness, Oil filters, Air filters, Head light, Truck bodies, Bowsers and Sensors.

Further, the component manufacturing industry is currently manufacturing sensors for the world-renowned automobile brands such as Toyota, Honda, Aston Martin, Volvo, Opel and BMW. A significant level of investment in the domestically value-added automobile manufacturing/assembly industry is an important factor to cater to the demand required by the components manufacturing industry to become competitive in the export market. USA, Germany, UK, Canada and Switzerland are the major export destinations of the Component manufacturing sector. Michelin, Ferentino, Continentals, GRI, Cable Solutions, Lanka Harness are some of the overseas companies that are involved in component manufacturing in Sri Lanka.

Sri Lankan Component Manufacturing has entered the Global Supply Chain by the technical collaboration between Ideal Auto Seating and MSKH India, a joint venture of Magna Worldwide - the largest automotive component manufacturer in the world. Magna Worldwide has its presence in 28 countries with 169,000 employees and 338 manufacturing plants. The sector has been able to reduce the importation of spare parts by 8 per cent.

The Ministry of Industries is currently in the process of compiling a Standard Operating Procedures (SOP) for the domestically value-added automobile industry, as a guideline to both the automobile manufacturing/assembly and components manufacturing industries. This SOP includes all regulations, procedures and requirements related to different aspects of the industry, from the registration of an industry to the safety & quality standards applicable to the same.

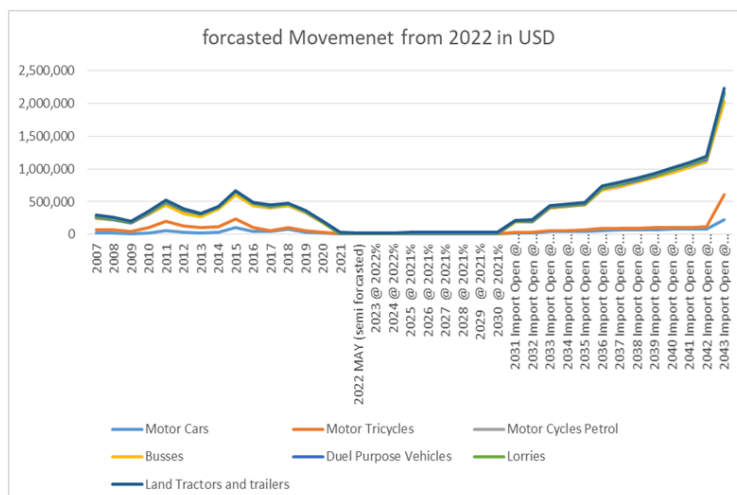
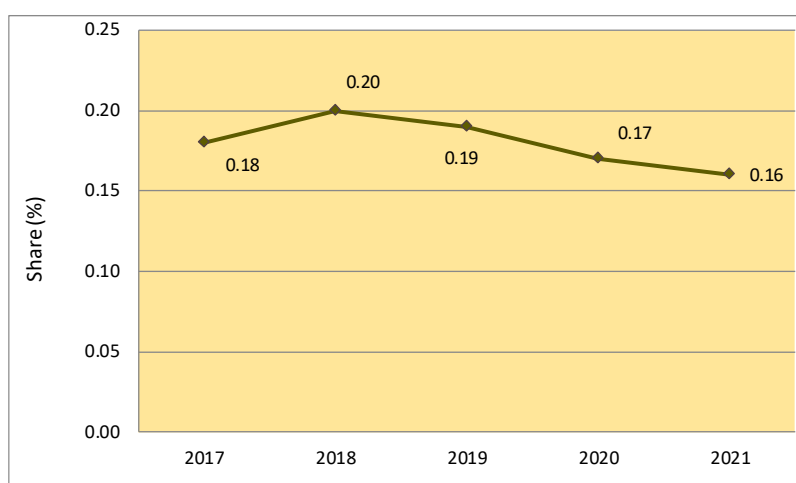


Table 13.1: Manufacture of Automobile Sector Contribution to the GDP at Current and Constant Market Price (2017 - 2021)

Manufacture of motor vehicles, trailers and semi-trailers

Year	Current market price		Constant market price	
	Contribution price (Rs. Mn)	Share (%) of Total Current GDP	Contribution price (Rs. Mn)	Share (%) of Total Current GDP
2017	1,885	0.01	2,375	0.03
2018	2,453	0.02	2,645	0.03
2019	5,711	0.04	2,842	0.03
2020	5,375	0.04	2,902	0.03
2021	6,143	0.04	3,040	0.03

Source : Department of Census and Statistics



Source : Department of Census and Statistics

Figure 13.1: The Contribution of the Automobile Industry sector to the share of the manufacturing industry to the GDP

Table 13.2: Automobile Manufacturing Establishments and Number of Persons Engaged (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	35	334	7	1,324
2016	21	221	10	820
2017	28	278	12	948
2018	43	469	15	1,111
2019	29	316	15	1,124

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

Table 13.3: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size of Automobile Industry (2015)
(Establishments with 5 or more persons engaged)

2015								
Size	No of establishments	Persons engaged	Em- ployees	Salary & Wages	Out put (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	12	53	42	10,398,950	34,220,306	15,639,916	18,580,390	1,865,319
10 to 99	25	385	373	101,579,274	1,646,775,853	1,411,555,073	235,220,780	11,376,521
100 & above	5	1,220	1,216	751,105,509	20,614,663,159	17,181,760,767	3,432,902,392	554,621,407
Group total	42	1,658	1,631	863,083,733	22,295,659,318	18,608,955,756	3,686,703,562	567,863,247

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

Table 13.4: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size of Automobile Industry (2016)
(Establishments with 5 or more persons engaged)

2016								
Size	No of establishments	Persons engaged	Employ- ees	Salary & Wages	Out put (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	15	103	80	18,605,970	65,107,680	30,734,865	34,372,815	547,000
10 to 99	15	557	551	150,879,192	1,092,828,714	840,898,739	251,929,975	54,658,750
100 & above	1	381	381	273,886,427	19,548,677,551	15,638,942,041	3,909,735,510	184,654,830
Group total	31	1,041	1,012	443,371,589	20,706,613,945	16,510,575,645	4,196,038,300	239,860,580

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

Table 13.5: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size of Automobile Industry (2017)
(Establishments with 5 or more persons engaged)

2017								
Size	No of establishments	Persons engaged	Employ- ees	Salary & Wages	Out put (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	17	113	83	23,529,292	69,598,517	30,653,583	38,944,934	2,559,669
10 to 99	21	587	567	228,821,172	1,740,692,231	1,279,691,811	461,000,420	60,208,386
100 & above	2	526	526	353,413,319	20,836,513,604	16,604,516,953	4,231,996,651	222,627,220
Group total	40	1,226	1,176	605,763,783	22,646,804,352	17,914,862,347	4,731,942,005	285,395,275

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

Table 13.6: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size of Automobile Industry (2018)
(Establishments with 5 or more persons engaged)

2018								
Size	No of establishments	Persons engaged	Employ-ees	Salary & Wages	Out put (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	24	153	121	31,203,833	198,151,883	124,403,985	73,747,899	3,460,849
10 to 99	32	901	878	376,961,585	1,113,044,741	531,925,249	581,119,492	155,527,734
100 & above	2	526	526	353,413,319	20,836,513,604	16,604,516,953	4,231,996,651	222,627,220
Group total	58	1,580	1,525	761,578,737	22,147,710,228	17,260,846,187	4,886,864,042	381,615,803

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

Table 13.7: Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size of Automobile Industry (2019)
(Establishments with 5 or more persons engaged)

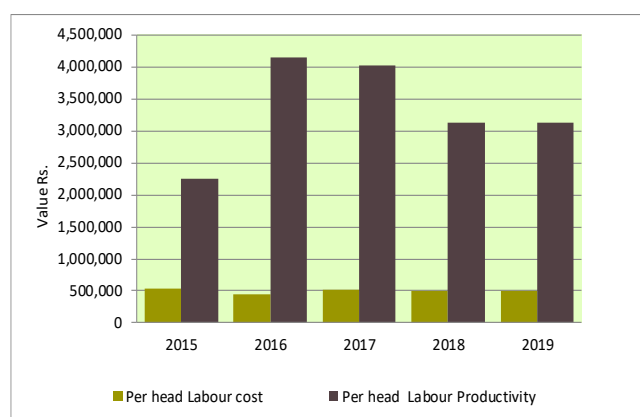
2019								
Size	No of establishments	Persons engaged	Employ-ees	Salary & Wages	Out put (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
less than 10	16	96	66	18,511,048	90,891,048	71,432,987	19,458,061	3,129,731
10 to 99	27	818	790	312,173,417	1,113,404,559	745,592,560	367,811,999	156,603,480
100 & above	2	526	526	353,413,319	19,353,131,926	15,412,208,233	3,940,923,693	222,627,220
Group total	45	1,440	1,382	684,097,784	20,557,427,533	16,229,233,780	4,328,193,753	382,360,431

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

Table 13.8: Manufacturing of Automobile Industry
Per Head Labour Productivity

Year	Per head Labour cost	Per head Labour Productivity	Labour Cost to productivity ratio
2015	529,175	2,260,395	4.27
2016	438,114	4,146,283	9.46
2017	515,105	4,023,760	7.81
2018	495,006	3,131,833	6.33
2019	495,006	3,131,833	6.33

Source : Department of Census and Statistics, Annual



Source : Department of Census and Statistics

Figure 13.2: Manufacturing of Automobile Industry
Per Head Labour Productivity

Table 13.9: Value of Output & Out put Components Classified by Automobile Industry Establishments 25 or more engaged

Year	Output (Rs.)	Shipped (Rs)/ products moved of the establish- ment (Rs.)	Change in Stocks (Rs.)	Industrial ser- vices & other revenue (Rs.)
2015	22,107,169,284	11,371,256,125	(256,964,698)	10,992,877,857
2016	20,551,066,574	10,768,735,567	(256,964,698)	10,039,295,705
2017	22,398,088,210	12,574,275,428	(256,561,861)	10,080,374,643
2018	21,438,458,118	11,361,445,774	(256,561,861)	10,333,574,205
2019	20,017,881,391	12,529,509,473	(256,561,861)	7,744,933,779

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

Table 13.10: Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Automobile Industry - (Establishments with 25 or more engaged)

Year	Intermediate consumption (Rs.)	Raw materials consumed (Rs.)	Cost of industrial services done by others & other payments (Rs.)	Electricity & fuel con- sumed (Rs.)
2015	18,516,730,111	18,122,100,540	353,360,243	41,269,328
2016	16,429,850,419	16,067,641,640	326,576,030	35,632,749
2017	17,798,211,688	17,273,497,665	485,075,897	39,638,125
2018	16,940,947,333	16,382,078,970	518,428,235	40,440,128
2019	15,850,942,168	15,287,495,340	519,442,830	44,003,999

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

**Table 13.11: Employment by Nature of Employment & Gender Classified by Industry Divisions of Automobile Industry
- (Establishment with 25 or more persons engaged)**

Year	Working Proprie- tors (No)		Unpaid family work- ers (No)		Operatives (No)		Other employees (No)		Total persons engaged	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
2015	8	2	-	-	707	353	212	42	928	396
2016	4	1	-	-	449	95	192	79	645	175
2017	6	2	-	-	584	71	211	75	800	148
2018	9	6	-	-	584	171	278	62	871	240
2019	9	6	-	-	596	171	278	63	884	241

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

Table 13.12: Economic Indicators of Industrial Activity Classified by Automobile Industry Class - (Establishments with 25 or more persons engaged)

Table 13.12.1: Manufacture of Motor Vehicles

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	52,621,201	1.176	18.390	7,871,560	0.176	2.751
2016	51,308,865	1.250	17.932	10,261,773	0.250	3.586
2017	51,308,865	1.250	17.932	2,861,374	0.250	3.586
2018	51,308,865	1.250	17.932	10,261,773	0.250	3.586
2019	47,077,566	1.254	16.453	9,543,575	0.254	3.335

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

Table 13.12.2: Manufacture of Bodies for Motor Vehicles; Manufacture of Trailers & Semi Trailers

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	-	-	-	-	-	-
2016	512,695	1.710	0.671	212,912	0.710	0.279
2017	5,287,403	1.369	7.766	680,829	0.369	2.095
2018	5,004,709	1.363	3.921	1,333,003	0.363	1.044
2019	5,378,346	1.298	3.722	1,234,626	0.298	0.854

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

Table 13.12.3: Manufacture of Parts and Accessories for Motor Vehicles

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	2,183,474	1.403	1.678	627,280	0.403	0.482
2016	5,005,850	1.218	1.864	895,063	0.218	0.333
2017	4,531,428	1.220	1.841	2,461,768	0.220	0.332
2018	931,598	1.907	0.339	443,126	0.907	0.161
2019	955,532	1.557	0.363	341,794	0.557	0.130

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

Table 13.13: Economic Indicators of Industrial Activity Classified by Automobile Industry Class (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	563,966	2.044	0.787	288,025	1.044	0.402
2016	703,834	1.927	1.843	338,562	0.927	0.887
2017	893,539	2.132	1.158	474,459	1.132	0.615
2018	1,512,265	2.217	1.336	830,178	1.217	0.734
2019	1,706,830	1.426	1.431	510,122	0.426	0.428

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

**Table 13.14: Categories of Employees by Nature of Employment Classified by Auto Mobile Industry
(Establishments with 25 or more persons engaged)**

Year	Employees (No)	Skilled (No)	Unskilled (No)
2015	1,313	915	145
2016	815	381	163
2017	940	505	150
2018	1,096	566	190
2019	1,109	574	194

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

**Table 13.15: Number of Automobile Manufacturing Industries and Engaged Persons in Sri Lanka
(2013/14 Economic Census)**

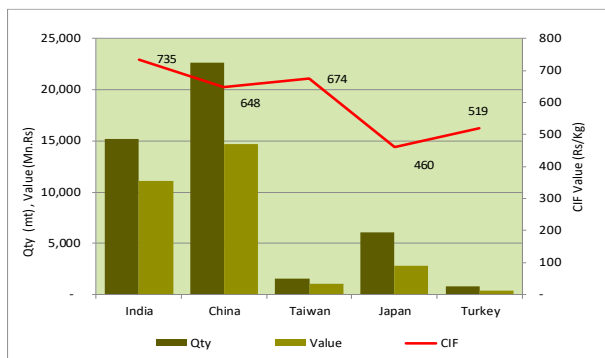
Industry	Micro		Small		Medium		Large	
	No. of Es-tab.	No. of PE	No. of Estab.	No. of PE	No. of Estab.	No. of PE	No. of Es-tab.	No. of PE
Manufacture & assembling of motor vehicles	5	14	5	80	8	679	1	200
Manufacture of bodies and trailers for motor vehicles;	175	370	32	247	6	488	-	-
Manufacture of parts and accessories for motor vehicles	169	297	19	229	10	553	1	575
Manufacture of car seats	51	85	3	23	-	-	-	-
Total	400	766	59	579	24	1,720	2	775

Source: Department of Census and Statistics

Table 13.16: Automobile Imports (2019-2021)

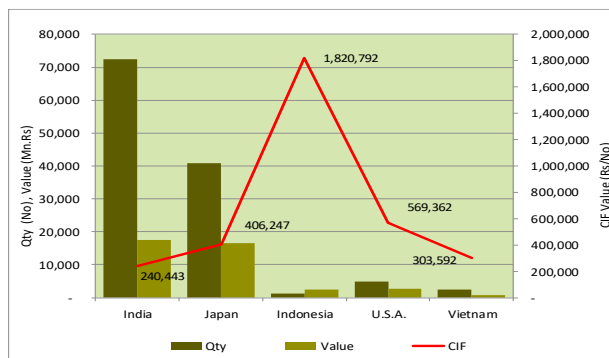
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof	('000) No	1,677	217,465	14,747	102,311	947	49,893
Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof	MT	38,786	19,791	18,661	9,525	48,862	33,853
Total	('000) No	1,677	217,465	14,747	102,311	947	49,893
Total	MT	38,786	19,791	18,661	9,525	48,862	33,853
Grand Total			237,256		111,836		83,746

Source: Sri Lanka Customs



Source : Sri Lanka Customs

Figure 13.3: Major Imports Countries of Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof - 2021



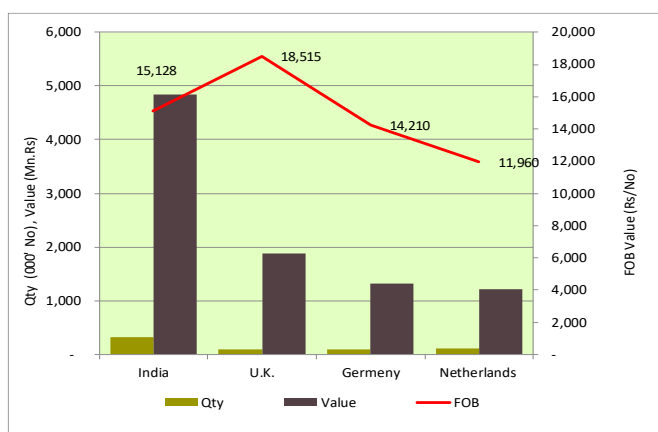
Source : Sri Lanka Customs

Figure 13.4: Major Imports Countries of Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof - 2021

Table 13.17: Automobile Exports (2019-2021)

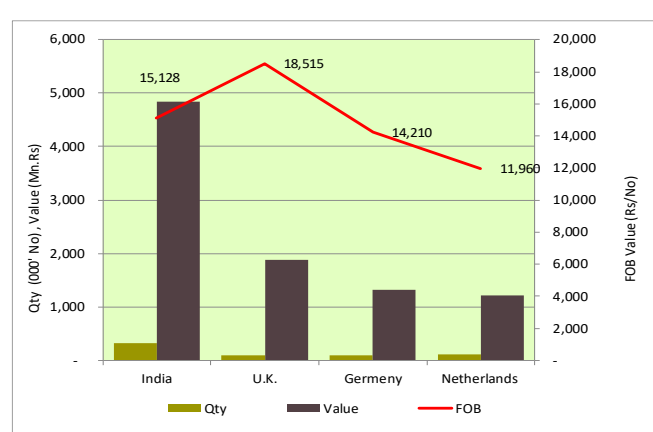
Description	Unit	2019		2020		2021	
		Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)	Quantity	Value (Rs. Mn)
Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof	('000) No	611	10,563	493	9,210	896	16,241
Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof	MT	3,355	1,707	3,303	1,590	3,607	1,917
Total	('000) No	611	10,563	493	9,210	896	16,241
Total	MT	3,355	1,707	3,303	1,590	3,607	1,917
GrandTotal			12,270		10,800		18,158

Source: Sri Lanka Customs



Source : Sri Lanka Customs

Figure 13.5: Major Exports Countries of Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof - 2021



Source : Sri Lanka Customs

Figure 13.6: Major Exports Countries of Vehicles other than railway or tramway rolling-stock, and parts and accessories thereof - 2021



14. SPICES INDUSTRY

Overview

Renowned as the Spice Island, Sri Lanka was historically recognized for its spice riches. Sri Lankan Spices and Allied Products Suppliers export the most sought-after cinnamon, pepper, cloves, cardamoms, nutmeg, mace and vanilla. These grow in abundance all over the island in fertile and diverse soil types and varying temperature conditions.

56% of Sri Lankan agricultural exports consist of spices, allied products and essential oils. These varieties of condiments are used to season, flavour and aromatise various forms of cuisines across the world. The chemical composition of Ceylon Spice products has been greatly shaped by the unique cultivation practices of the country.

The main spices produced in Sri Lanka include Cinnamon, Pepper, Cardamom, Cloves, Ginger, Vanilla, Nutmeg and Mace and the country is the ninth most important

While most of the Ceylon Spices are exported in the form of bulk, unprocessed spices, the country also exports essential oils and oleoresins made from spices and herbs. Moreover, the popularity of Sri Lankan cuisine has given rise to a growing industry of Sri Lankan condiments and spice preparations.

Sri Lanka holds the monopoly for Ceylon Cinnamon or true cinnamon, with a unique fragrance and taste, as well as a remarkably low amount of coumarin. Cinnamon is the third largest agriculture export from Sri Lanka with 31,000 hectares under cultivation employing nearly 400,000 people directly and indirectly.

Cinnamon holds great potential as a major revenue and employment generation avenue in Sri Lanka. EDB Sri Lanka holds the ownership of the "Pure Ceylon Cinnamon" (PCC) branding as well as other associate names "Ceylon Cinnamon", "Sri Lanka Cinnamon" and Sri Lanka "Kurundu". The "Pure Ceylon Cinnamon" trademark is registered in the EU, Mexico, the USA, Peru and Colombia with the objectives of differentiating it from Cassia.

Pepper was found growing in the wild in ancient Sri Lanka and can be found as a home garden or a mid-range crop in Sri Lanka, today. It is mainly cultivated in low and mid regions with a cooler climate. The total number of pepper cultivated land amounts to nearly 30,320 hectares in Sri Lanka and many cultivators combine pepper cultivation with another crop, practicing mix-crop cultivation. The weather and soil have a greater effect on the taste of peppercorn and the level of piperine, the alkaloid responsible for the pungency and aroma of pepper.

Sri Lankan pepper has a high level of piperine, compared to the other pepper exporters in the world and carries a taste quite similar to the renowned Malabar Pepper. Sri Lankan pepper manufacturers mainly produce black pepper and white pepper from their harvest. While black and white peppercorns are both the fruit of the pepper plant, they are processed differently to bring out different colour and strength. Sri Lanka caters to 6% of the global demand for pepper earning an average revenue of USD 36 million through exports made to India, Germany and the USA among others.

The third most expensive spice in the world spice market second only to saffron and vanilla, cardamom was introduced to Sri Lanka by the British-East India Company, to fill the growing demand for cardamom grown in the Indo-China region, in the global spice market.

Cultivated in the central hill country of Sri Lanka, the size of cardamom cultivation in Sri Lanka amounts to nearly 2,794 hectares, producing an average of 320 metric tons per year. Ceylon Cardamom is mainly exported to India, UAE, Saudi Arabia, and Iraq.

Introduced to the country by Ancient Arabic spice traders, Ceylon Clove is grown in the Mid Country wet zone of Sri Lanka. The country has nearly 7,700 hectares of clove cultivation spread across the mid-country wet zone areas including Kandy, Kegalle and Matale districts. Sri Lanka produces an average of 5,301 metric tons of cloves per year and is among the top ten clove exporting countries to the world market.

Sri Lanka exports a range of essential oils including Ceylon Cinnamon Oil, Pepper Oil, Cardamom Oil, Ceylon Citronella Oil, Clove Oil and Nutmeg Oil for export markets in the USA, India, Singapore, Germany, the USA and France, earning an average revenue on USD 66 Million. Mainly used for perfumery, cosmetic or toilet preparations essential oil industry in Sri Lanka is governed by four main distilleries, 12 small and medium scale distilleries as well as nearly 170 field distillation units.

Essential oils are produced by the distillation of leaves, barks, roots, and flowers of various herbal plants and have been widely used in aromatherapy, Ayurveda, and the cosmetic industry. The rich variations of herbs, spices, and flowering plants available in Sri Lanka has led to a robust industry that produces essential oils using celebrated Ceylon Spices, that are rich in goodness, aroma, and flavour.

Total export earnings from the Spice and allied products sector amounts to USD 456 million by the end of 2021. The Sector Contributed 3.55 % to total merchandise exports in year 2021. This is while receiving USD 71.81 million from Mexico, the largest buyer of the Sri Lankan Spices.

Recognizing the importance of the sector, the Government of Sri Lanka has provided various types of incentives for cultivation and processing of spices through the Department of Export Agriculture. PCC Mark - The PCC certification mark designates that the cinnamon is produced, processed, packed in Sri Lanka and sold with no extraneous matters. The EDB has been authorized by the Government to be the holder and the protector of Ceylon Cinnamon Certification Mark and the Geographical Indication (GI) on behalf of the people of the Sri Lanka. Ceylon Cinnamon Certification mark has been registered in the Europe, USA, Peru, Colombia and WIPO. It is being registered in Mexico and EDB is planning to register the same in Australia and New Zealand.

GI for Ceylon Cinnamon is a sign used as a product indication which will identify it as originating from a specific country and possess qualities reputation that are due to that country. GI can be viewed as a source of competitive advantage for commercialization and has a dynamic marketing power help to increase market differentiation mainly in international market, allow for a premium price from the consumer. Ceylon Cinnamon has obtained the GI status.

Table 14.1: Spices Products Imports (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Pepper of the genus piper, dried or crushed or ground fruits of the genus capsicum or of the genes pimento	MT	52,718	14,941	50,791	17,608	50,206	18,477
Vanilla : Neither crushed nor ground :Vanilla pods	MT	1	4	4	63	0	2
Cinnamon and cinnamon-tree flowers	MT	1	2	0	2	0	0
Cloves (whole fruit, cloves and stems)	MT	14	17	-	-	10	11
Nutmeg, mace and cardamoms	MT	65	152	20	38	1	1
Seeds of anise, badian, fennel, coriander, cumin or caraway; juniper berries	MT	18,469	3,787	25,602	5,065	25,228	6,069
Ginger, saffron, turmeric (curcuma), thyme, bay leaves, curry and other spices	MT	9,038	1,790	4,325	810	3,285	706
Total	MT	80,307	20,694	80,742	23,585	78,729	25,266

Source : Sri Lanka Customs

Table 14.2: Spices Products Exports (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Pepper of the genus piper, dried or crushed or ground fruits of the genus capsicum or of the genes pimenta	MT	8,261	8,506	9,503	9,431	18,494	23,055
Vanilla : Neither crushed nor ground :Vanila pods	MT	1	25	1	26	1	30
Cinnamon and cinnamon-tree flowers	MT	17,176	31,463	18,722	38,219	18,814	45,879
Cloves (whole fruit, cloves and stems)	MT	5,115	5,360	2,579	2,235	6,479	6,888
Nutmeg, mace and cardamons	MT	3,036	3,852	2,048	3,046	1,993	3,579
Seeds of anise, badian, fennel, coriander, cumin or caraway; juniper berries	MT	41	17	84	29	38	27
Ginger, saffron, turmeric (curcuma), thyme, bay leaves, curry and other spices	MT	959	747	1,278	1,047	1,403	1,387
Grand Total	MT	34,588	49,969	34,215	54,034	47,222	80,845

Source: Sri Lanka Customs



15. VALUE ADDED TEA INDUSTRY

Overview

Globally, the Ceylon tea brand has enjoyed a reputation as the world's best tea for more than a century due to the country's favorable climate. Because of that climatic effect, a tea product with different flavors and aromas has been originated in the country's soil. At present, 10% share of the international market has been acquired by Sri Lankan tea products.

According to Central Bank reports, the total amount of tea produced in 2022 is about 231.867 million kilograms and the total cultivated area is 200 thousand hectares. Tea plantations are concentrated around the central hills and the southern region. It is analyzed under 3 main geographical regions; Above 1200 meters - Nuwara Eliya, Udupusellawa, Uva and Dimbula From 600 meters to 1200 meters – Kandy and From sea level to 600 meters – Sabaragamuwa and Ruhuna.

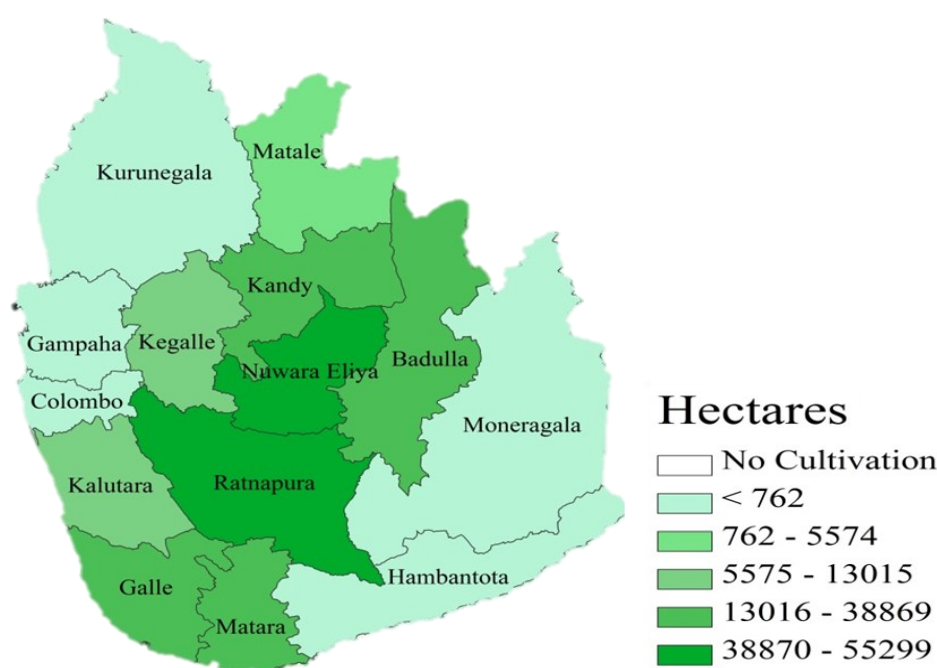


Figure 15.1: Area Under tea Cultivation

Sri Lanka exports more than 50% of tea in value-added form. Value added tea products include green tea, flavored tea, organic tea, instant tea and iced tea. The basic tea production in Sri Lanka is 231.867 million kilograms. The products are orthodox , cut, tear & curl (CTC), Green tea, Instant tea, Bio tea and Flavored tea products.

Total export earnings from the sector amounts to at USD 1.26 billion by the end of 2021. The Sector Contributed 10.82% to total merchandise exports in year 2021. This is while receiving USD 147.03 billion from Iraq, the largest buyer of the Sri Lankan Tea. Russia, UAE, Turkey, Iran and Azerbaijan are other major export destinations available for country's Tea products. Sector contribution to GDP stands at approximately 2%.

To promote the export of value added tea for tea exporting companies, the Ministry makes annual recommendations for the TIEP facility and to provide high quality to the tea manufacturing industry, the Ministry implements quality assurance programs such as ISO, HACCP, GMP. In addition to this, trade promotion programs are implemented to popularize the Sri Lankan tea brand name locally and abroad.

Table 15.1: Tea Products Imports (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Filter Paper and paperboard: filter paper	MT	2,418	2,422	2,144	2,136	-	-
Filter Paper and paperboard: filter paperboard	MT	7	11	45	47	-	-
Other : Preparation of a kind use as raw materials in food or beverage industry : Flavours	MT	1,253	3,162	1,106	3,052	1,110	3,348
Cotton, sewing thread, whether or not put up for retail sale.	MT	73	107	-	-	24	67
Of a kind used in the food or drink industries : Mixture of odoriferous substances and mixtures (including alcoholic solutions) with a basis of one or more of these substances, of a kind used as	MT	831	2,495	729	2,875	761	3,650
Other : Preparations for making beverages : Herbal preparations for use as "Herbal teas"	MT	36	37	-	-	33	45
Ginseng roots	MT	1	0.1	1	1	-	-
Other: Dried Cinnamon leaves, without any parts of branches	MT	10	17	0.1	0.2	-	-
Other: Other	MT	3,153	1,880	-	-	-	-
Other green tea (not fermented) : Other : Other	MT	3,183	1,520	2,073	951	2,023	1,117
Other black tea (fermented) and other partly fermented tea : Other : Other,	MT	4,322	1,811	4,081	1,573	4,504	2,157
Total	MT	15,288	13,462	10,179	10,634	8,456	10,385

Source: Sri Lanka Customs

Table 15.2: Tea Products Exports (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Other : Preparation of a kind use as raw materials in food or beverage industry : Flavours	MT	-	-	4	3	25	9
Cotton, sewing thread, whether or not put up for retail sale.	MT	3	4	-	-	3	5
Of a kind used in the food or drink industries : Mixture of odoriferous substances and mixtures (including alcoholic solutions) with a basis of one or more of these substances, of a kind used as raw materials in industry	MT	67	272	26	111	37	163
Other : Preparations for making beverages : Herbal preparations for use as "Herbal teas"	MT	1,569	8,111	855	3,649	881	4,606
Other: Dried Cinnamon leaves, without any parts of branches	MT	89	30	328	39	-	-
Other: Other	MT	478	816	779	1,096	-	-
Total	MT	2,207	9,234	1,992	4,899	946	4,782

Source: Sri Lanka Customs



16. COIR INDUSTRY

Overview

The coir industry is an agro-based rural industry that provides a wide variety of employment opportunities, mainly in the coconut-based manufacturing industry. This is an export based industry and an industry that earns foreign exchange for the country. Sri Lanka can be considered as a major exporter of coir and coir-related products. In particular, the local coir industry is traditionally spread in the North-West, Western and Southern Provinces, the white fiber coir industry, which is largely done by domestic labor by using their labor power, and the more modernized brown fiber industry, which is oriented towards export, is spreading with the North-West Province leading the way. (Flexible white fibers are obtained from raw green coconut husks and dark brown fibers are obtained from mature fruits.)

About 10% of the production of coir comes from the traditional coir production areas in the south, and more than 85% of the production comes from the coir mills established in the North-West and Western Provinces.

There are about 900 coir factories established throughout the island of Sri Lanka, but 600 factories are engaged in continuous production throughout the year. Of these, nearly 200 factories have been registered with the Coconut Development Authority. There are 10,000 direct jobs and 20,000 indirect jobs associated with the coir industry.

The coconut industry is an important source of foreign exchange earnings and employment for Sri Lanka. Out of the total land area, 443,528.17 hectares are under coconut cultivation. Out of the total land area, 72,307.20 hectares are under plantation sector and 371,220.97 hectares are small lands. In terms of geographical distribution, mainly the western and north-western provinces are the areas where coconuts are widely cultivated. Three major coconut producing districts are Kurunegala, Puttalam and Gampaha. It is called the "Coconut Triangle".

Sri Lanka has a comparative advantage over other countries in coconut plantation due to its favorable conditions such as its heritage, geographical location, availability of skilled labor and highly traditional techniques for processing. Current annual coconut production is 3 billion coconuts, of which 1.8 billion coconuts are estimated for domestic consumption and the rest are exported.

Export income of coir-related products in 2021 is USD 248.35 million, of which USD 62.82 million from the export of coir and coir-related value-added products, and USD 185.53 million has also been generated from the export of other products related to coir. Mexico, USA, South Korea, and UK are the main export destinations for country's coir products. India, Vietnam and Indonesia are the main competitors of the global coir market.

Figure 16.1: Classification of Products

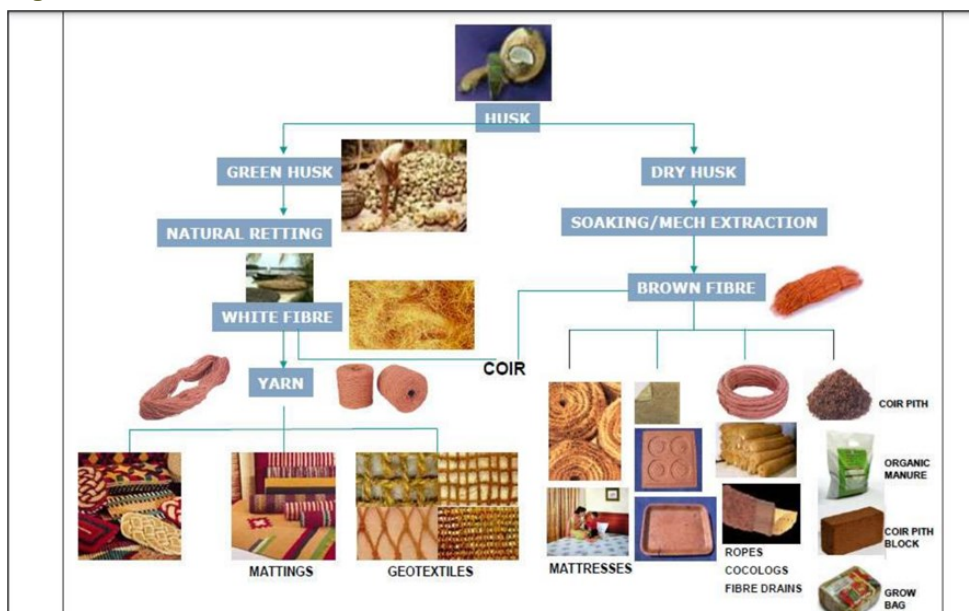


Table 16.1: Coir Products Imports (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs.)	Qty	Value (Rs.)	Qty	Value (Rs.)
Twisted Fibre							
Raw bristle fibre of coconut (coir) twisted	Kg	2	500	-	-	-	-
Raw mattress fibre of coconut (coir) twisted	Kg	-	-	-	-	-	-
Raw mixed fibre of coconut (coir) twisted	Kg	11	3,000	-	-	2	2,234
Raw omatt fibre of coconut (coir) twisted	Kg	-	-	2	2,487	1	1,019
Other raw fibre of coconut (coir) twisted	Kg	-	-	-	-	-	-
Bristle Fibre							
Raw bristle fibre of coconut (coir) not twisted	Kg	1,000	335,514	-	-	-	-
Raw bristle fibre of coconut (coir) bleached	Kg	1	500	-	-	-	-
Raw bristle fibre of coconut (coir) dyed	Kg	-	-	-	-	1	1,000
Raw omatt fibre of coconut (coir) not twisted	Kg	-	-	-	-	14	22,078
Mattress Fibre							
Raw mattress fibre of coconut (coir) mixed with animal hair and not twisted	Kg	-	-	-	-	-	-
Raw mattress fibre of coconut coir not twisted	Kg	-	-	-	-	-	-
Other raw of coconut (coir)	Kg	92	33,200	8	5,500	15	13,500
Fibre Pith							
Raw fibre pith of coconut (Raw format not processed)	Kg	2	500	-	-	6	500
Moulded coir products							
Moulded products of coconut (coir) for use in horticulture	Kg	-	-	7	5,542	21,041	3,512,855
Other, raw noils and waste of coconut (coir)	Kg	-	-	-	-	-	-
Other of coconut coir	Kg	15	5,000	8	9,000	6	5,000
Coir Yarn	Kg	-	-	-	-	-	-
Geotextiles	Kg	11,416	7,687,608	12,196	34,413,753	5,764	19,246,123
Coir twine	Kg	8	49,130	188	39,872	0	318
Coir rope	Kg	1,138	7,939,983	3,328	617,702	416	2,369,670

Description	Unit	2019		2020		2021	
		Qty	Value (Rs.)	Qty	Value (Rs.)	Qty	Value (Rs.)
Coir carpets & Rugs	Square Meters	665	130,017	33	19,718	5	1,300
Matts & Rugs	Square Meters	118,244	84,045,179	49,503	25,008,661	11,000	7,077,264
Other	Square Meters	8,259	8,853,586	559	821,062	61	29,748
Matting	Square Meters	179	48,883	3,256	1,594,338	8,270	2,753,689
Rubberized coir pads							
Unused rubberized coir pads for mattresses, below 60mm in thickness	No	-	-	24	514,045	10	170,414
Unused rubberized coir pads for mattresses, below 60mm in thickness	Kg	-	-	-	-	-	-
Unused rubberized coir pads for mattresses for bedding, above 60mm in thickness	No	386	14,881,373	39	416,780	-	-
Brooms & Brushes							
Brooms made of coconut fibre	No	244	167,681	1,057	74,810	104	104,070
Other brushes made of coconut fibre	No	4	8,000	484	375,784	378	378,436
Tawashi brushes							
Tawashi brushes made of 100% coconut fibre	No	588	22,294	4	2,000	1	2,934
Tawashi brushes made of coconut fibre mixed with other vegetable fibre	No	-	-	2	3,023	620	128,035
Tawashi brushes made of coir fibre mixed with artificial fibre	No	246	13,416	300	236,723	-	-
Total	Kg	13,685	16,054,935	15,737	35,093,856	27,266	25,174,297
Total	Square Meters	127,347	93,077,665	53,351	27,443,779	19,336	9,862,001
Total	No	1,468	15,092,764	1,910	1,623,165	1,113	783,889
Grand Total			124,225,364		64,160,800		35,820,187

Source: Sri Lanka Customs

Table 16.2: Coir Products Exports (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Twisted Fibre							
Raw bristle fibre of coconut (coir) twisted	MT	422	49	411	26	71	5
Raw mattress fibre of coconut (coir) twisted	MT	6,777	585	4,920	467	5,312	527
Raw mixed fibre of coconut (coir) twisted	MT	15,962	827	12,263	639	12,671	800
Raw omatt fibre of coconut (coir) twisted	MT	428	39	77	10	10	2
Other raw fibre of coconut (coir) twisted	MT	483	56	377	32	475	41
Bristle Fibre							
Raw bristle fibre of coconut (coir) not twisted	MT	1,236	161	1,298	131	1,001	145
Raw bristle fibre of coconut (coir) bleached	MT	1,176	255	1,234	220	1,045	285
Raw bristle fibre of coconut (coir) dyed	MT	230	70	356	75	334	85
Raw omatt fibre of coconut (coir) not twisted	MT	8,269	377	11,028	495	1,587	79
Mattress Fibre							
Raw mattress fibre of coconut (coir) mixed with animal hair and not twisted	MT	7,957	324	20	1	-	-
Raw mattress fibre of coconut coir not twisted	MT	41,238	1,891	68,008	3,050	69,448	3,569
Other raw of coconut (coir)	MT	2,694	119	3,576	164	3,992	240
Fibre Pith							-
Raw fibre pith of coconut (Raw format not processed)	MT	35,251	1,675	38,526	1,782	40,894	2,198
Moulded coir products							
Moulded products of coconut (coir) for use in horticulture	MT	243,128	22,150	269,688	24,880	320,623	34,267
Other, raw noils and waste of coconut (coir)	MT	-	-	112	12	768	51
Other of coconut coir	MT	852	66	2,720	234	3,449	399
Coir Yarn	MT	1,181	203	993	152	1,109	185
Geotextiles	MT	4,475	847	4,273	843	4,550	1,037
Coir twine	MT	8,248	1,857	7,228	1,758	8,149	2,143
Coir rope	MT	49	15	41	10	43	16

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Coir carpets & Rugs	Square Meters	0.30	1	1	1	3	6
Matts & Rugs	Square Meters	435	344	315	294	376	356
Other	Square Meters	69	28	9	7	1	3
Matting	Square Meters	4	6	3	4	6	4
Rubberized coir pads							
Unused rubberized coir pads for mattresses, below 60mm in thickness	('000) No	1,875	152	648	123	774	101
Unused rubberized coir pads for mattresses, below 60mm in thickness	MT	-	-	-	-	42	23
Unused rubberized coir pads for mattresses for bedding, above 60mm in thickness	('000) No	10	48	16	61	16	71
Brooms & Brushes							
Brooms made of coconut fibre	('000) No	6,590	945	9,523	810	6,850	1,117
Other brushes made of coconut fibre	('000) No	7,155	666	6,087	544	6,620	689
Tawashi brushes							
Tawashi brushes made of 100% coconut fibre	('000) No	26,905	928	24,474	761	21,584	723
Tawashi brushes made of coconut fibre mixed with other vegetable fibre	('000) No	-	-	150	1	510	5
Tawashi brushes made of coir fibre mixed with artificial fibre	('000) No	458	14	255	8	330	12
Total	MT	382,075	31,569	429,169	34,979	477,593	46,097
Total	Square Meters	508	378	328	306	386	369
Total	('000) No	42,994	2,753	41,153	2,309	36,685	2,719
Grand Total			34,700		37,594		49,185

Source: Sri Lanka Customs

17. MISCELLANEOUS

17.1: Other Imports (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Optical, photographic , cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus, parts and accessories thereof	MT	1,143	15,420	1,069	13,202	1,136	18,592
Optical, photographic , cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus, parts and accessories thereof	('000) No	216,848	44,988	201,812	32,424	279,725	44,135
Clocks and watches and parts thereof	MT	80	34	149	34	99	41
Clocks and watches and parts thereof	('000) No	9,347	2,811	5,583	2,216	8,628	4,847
Musical instruments; parts & accessories of such articles	MT	51	47	25	31	25	41
Musical instruments; parts & accessories of such articles	('000) No	1,553	808	2,416	950	824	689
Arms and ammunition ; parts & accessories thereof	MT	40	243	312	709	10	44
Arms and ammunition ; parts & accessories thereof	('000) No	8	401	11	93	25	95
Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and lighting fittings, not elsewhere specified or included; illuminated signs, illuminated name- plates and the like ; prefabricated buildings	MT	26,862	13,222	22,545	10,592	19,273	12,542
Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and lighting fittings, not elsewhere specified or included; illuminated signs, illuminated name- plates and the like ; prefabricated buildings	('000) No	800	3,027	506	1,930	474	1,892
Toys, games and sports requisites; parts and accessories thereof	MT	9,729	3,468	8,708	2,836	11,161	2,708
Toys, games and sports requisites; parts and accessories thereof	('000) No	17,043	1,324	14,227	1,141	15,976	1,626
Toys, games and sports requisites; parts and accessories thereof	('000) Ps	19	6	12	7	23	9
Miscellaneous manufactured articles	MT	12,604	12,348	17,593	10,735	10,978	15,712
Miscellaneous manufactured articles	('000) No	12,309	1,518	11,601	1,262	32,699	1,714

Source: Sri Lanka Customs

17.2: Other Exports (2019-2021)

Description	Unit	2019		2020		2021	
		Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)	Qty	Value (Rs. Mn)
Optical, photographic , cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus, parts and accessories thereof	Kg	419	1,339	404	1,766	605	1,850
Optical, photographic , cinematographic, measuring, checking, precision, medical or surgical instruments and apparatus, parts and accessories thereof	No	4,231	10,688	8,746	12,176	6,946	15,518
Clocks and watches and parts thereof	Kg	0.1	0.3	-	-	-	-
Clocks and watches and parts thereof	No	12	37	5	2	4	8
Musical instruments; parts & accessories of such articles	Kg	0.1	0.1	0.1	0.02	0.2	0.1
Musical instruments; parts & accessories of such articles	No	9	37	3	20	25	43
Arms and ammunition ; parts & accessories thereof	Kg	0.05	0.02	-	-	-	-
Arms and ammunition ; parts & accessories thereof	No	0.03	0.2	1	2	0.001	0.01
Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and lighting fittings, not elsewhere specified or included; illuminated signs, illuminated name-plates and the like ; prefabricated buildings	Kg	12,306	2,455	1,429	1,765	2,176	3,030
Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and lighting fittings, not elsewhere specified or included; illuminated signs, illuminated name-plates and the like ; prefabricated buildings	No	2,408	7,467	2,136	8,915	1,505	8,897
Toys, games and sports requisites; parts and accessories thereof	Kg	-	-	-	-	-	-
Toys, games and sports requisites; parts and accessories thereof	Kg	3,116	7,423	2,614	6,537	2,252	8,017
Toys, games and sports requisites; parts and accessories thereof	No	18,429	6,017	12,275	6,161	13,952	9,588
Miscellaneous manufactured articles	Kg	330	653	342	497	275	722
Miscellaneous manufactured articles	No	70,917	7,284	62,526	5,972	67,654	15,675

Source: Sri Lanka Customs

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