

Sri Lanka

Fisheries Industry Outlook 2018



***National Aquatic Resources Research and
Development Agency (NARA)***

Socio-economic and Marketing Research Division

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Abbreviations and Acronyms

CBSL	Central Bank of Sri Lanka
CCFSU	Ceylon Co-operative Fish Sales Union
CFC	Ceylon Fisheries Corporation
CFHC	Ceylon Fishery Harbours Corporation
DFAR	Department of Fisheries and Aquatic Resources
EDB	Export Development Board
EEZ	Exclusive Economic Zone
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FRP	Fibreglass Reinforced Plastic
GDP	Gross Domestic Product
MFAR	Ministry of Fisheries and Aquatic Resources
NAQDA	National Aquaculture Development Authority
NARA	National Aquatic Resources Research and Development Agency
SAARC	South Asian Association for Regional Corporation
SED	Socio-economic and Marketing Research Division
IMUL	Inboard Multi-Day Boat
IDAY	Inboard Day Boat
OFRP	Outboard Fibre Reinforced Plastic Boats
MTRB	Mechanized Traditional Boats
NTRB	Non-Mechanized Traditional Boats
NBSB	Non-Mechanized Beach Seine Boat

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The 'Fisheries Industry Outlook' is an annual publication of the Socio-economic and Marketing Research Division (SED) of the National Aquatic Resources Research and Development Agency (NARA). The 'Fisheries Industry Outlook' comprised of data and information on the status and development of fisheries sub-sector of the economy with special emphasis on production, trade and marketing and consumption of fish and fishery products. This is the all in one handbook of fishery industry statistics of Sri Lanka.

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Overview

Being an Island nation, Sri Lanka is enriched with enormous fishery resources that can be utilized for the socio economic development of the country. Fisheries sector provide direct and indirect employment opportunities for about 583,000 people and livelihoods for 2.7 million coastal communities. Importantly it provides more than 60% of animal protein requirement of people in the country. The fishery industry comprised of coastal, offshore/deep-sea, and inland sub sectors. In 2018, the share of fisheries to the Gross Domestic Production (GDP) of the country was 1.2% (MFAR, 2019).

The total fish production of the country in 2018 was 527,060 metric tons (MT) and of them marine fish production was 439,370 MT while the rest (87,690 MT) from inland and aquaculture. Of total fish production 141,080 MT of fresh fish had utilized locally for dry fish production. Although there are totally, 15 fisheries districts of the country, Tangalle (15%) and Galle (12%) districts together had contributed 27 percent to the total marine fish production of the same year. Ampara (16%), Anuradhapura (15%), and Polonnaruwa (13%) were dominant among inland fish producing districts of the country. In 2018, the total fish production of the country decreased by 0.8 % compared to 2017 and this was mainly attributed to the decline in marine fish production that was driven by the adverse weather conditions that prevailed during the second quarter of 2018 in the Western and Southern coastal areas of the country.

The total recurrent and capital expenditure of the Ministry of Fisheries and Aquatic Resources in 2018 was Rs. million 2,098 and 3,522 respectively (Central Bank, 2018). With excess local demand on fish and fishery products, Sri Lanka had imported 84,463 MT of fish and fishery products in 2018 to cater the excess demand with spending Rs. 32,726 million. The major importing fishery products to Sri Lanka were the dried fish and canned fish. As per a remedy, the government of Sri Lanka with the support of private sector had initiated production of canned fish domestically. The country had also exported 27,998 MT of fish and fishery products and earned Rs. 47,948 million in 2018.

1. Fish Production

The total fish production of the country was 527,060 MT in 2018, representing a 0.8% decrease from the 531,310 MT in 2017. The decrease in total fish production was mainly attributed to the decline in marine fish production. The marine fish production of the country had reduced by 2.24% to 439,370 MT in 2018 compared with 449,440 MT in 2017, largely due to the drop in coastal fish production. Coastal fish production had dropped by 4.12% to 249,020 MT in 2018 compared with 259,720 MT in 2017. Meanwhile offshore/deep sea fish production had increased marginally by 0.33% to 190,350 MT. However, the decrease in marine fish production was mainly driven by the adverse weather conditions that prevailed during the second quarter of 2018 in the Western and Southern coastal areas of the country that interrupted the operations of the day boats. Conversely, inland and aquaculture fish production had increased by 7.1% to 87,690 MT compared with 81,870 MT in previous year. The growth in inland and aquaculture fish production was resultant by the increased release of fingerlings to tanks that was supported by the recovery in water levels in major reservoirs in the early part of 2018, enhanced management and monitoring of fisheries activities. Table 1 shows fish production by sectors over the years of 2013 to 2018.

Table 1: Annual Fish Production by Sub Sectors (MT)

Sector	2013	2014	2015	2016	2017	2018
Marine Sector	445,930	459,300	452,890	456,990	449,440	439,370
Coastal	267,980	278,850	269,020	274,160	259,720	249,020
Offshore/Deep Sea	177,950	180,450	183,870	182,830	189,720	190,350
Inland and Aquaculture Sector	66,910	75,750	67,300	73,930	81,870	87,690
Total	512,840	535,050	520,190	530,920	531,310	527,060

Source: Ministry of Fisheries and Aquatic Resources

Marine fish production contributed 83% of the total fish production, of which the coastal fish production was 47%. This indicates that the coastal fisheries are still the major contributing sub sector to the Sri Lankan fisheries. The fisheries sector contribution to the Gross Domestic Production (GDP) was rather marginal, accounting for 1.2% of the GDP, at constant price in

2018. The percentage contribution of fisheries sector to GDP was reduced by 0.1% in 2018 compared to the year 2017.

1.1 Marine Fish Production

The marine fisheries of Sri Lanka consist of two main subsectors, namely coastal and offshore/deep sea fisheries. The contribution of marine fisheries to the total fish production was 83% or 439,370 MT in 2018, alarming 2.2% decrease from the 449,440 MT in 2017. Tuna species: Balaya (Skipjack tuna) and Kelawalla (Yellow fin tuna) were dominant species in the catch composition and had contributed 13 and 9% to the total marine fish production of the country in 2018. The production of Balaya had declined by 5% while the production of Kelawalla had increased by 7% compared with the previous year. Table 2 below shows the marine fish production by major commercial groups. Tangalle (15%) and Galle (12%) were dominant fisheries districts that contributed around 27% to the total marine fish production of the country in 2018. In addition, Kalutara (10%), Jaffna (9%), Puttalam (8%) and Trincomalee (8%) districts had also contributed significantly to the total marine fish production of the country in sequence. The Figure 1 shows fish production by fisheries districts in 2018.

Table 2: Marine Fish Production by Major Commercial Groups (MT)

Commercial Groups		2014	2015	2016	2017	2018
Thora	Seer	30,000	8,940	7,440	7,790	7,670
Paraw	Carangids	29,270	34,050	32,620	23,690	22,290
Balaya	Skipjack tuna	61,750	54,040	47,730	57,960	55,000
Kelawalla	Yellow fin tuna	45,200	46,430	39,600	38,960	41,690
Other Blood Fish	Other tuna like species	59,190	46,930	38,750	44,520	51,900
Thalapath	(Other bill fish)	***	26,040	32,530	33,180	32,680
Others		233,890	236,460	258,320	243,340	228,140
Total		459,300	452,890	456,990	449,440	439,370

Source: Ministry of Fisheries and Aquatic Resources

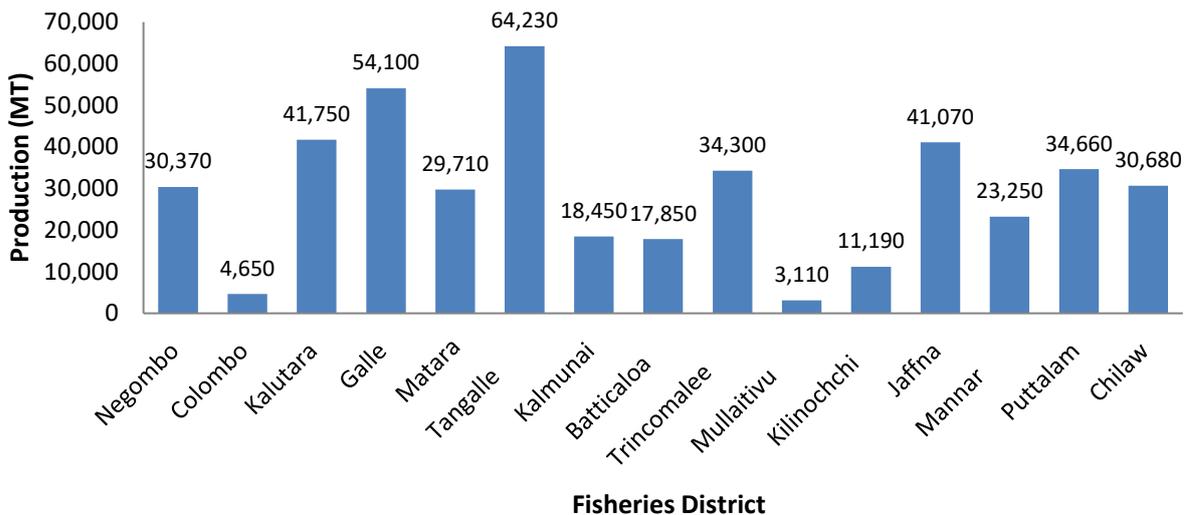


Figure 1: Marine Fish Production by Fisheries Districts (MT) –2018

Source: Ministry of Fisheries and Aquatic Resources

1.2 Inland and Aquaculture Fish Production

The total inland and aquaculture fish production was 87,690 MT in 2018, contributing 17% to the total fish production of the country (MFAR, 2019). The 2018 inland and aquaculture fish production showed an increase of 7% over the previous year. The increased in inland and aquaculture fish production largely attributed in released more fingerlings to tanks with the increased of the water levels in major reservoirs in the early part of 2018 due to prevailed weather conditions and enhanced management practices in aquaculture activities. Ampara (16%), Anuradhapura (15%) and Polonnaruwa (13%) were dominant inland fish producing districts of the country. Table 3 shows catch composition of inland fish production (MT) in 2018. Tilapia species were dominant in inland and aquaculture fish production and had contributed nearly 59 percent in 2018. Among others, cultured shrimp, focused mainly for export markets, had contributed nearly 9 percent to the total. Cultured shrimp production showed a significant growth, 76% higher, compared with 2017.

Table 3: Inland Fish Production by Major Species (MT)

Species	2013	2014	2015	2016	2017	2018
Tilapia	39,070	46,610	40,504	43,836	50,065	51,810
Carps/Mirigal	3,450	3,920	2,847	3,363	4,250	3,630
Catla/Rohu	8,980	11,020	9,117	7,772	8,435	9,115
Hiri Kanaya	590	580	358	230	330	300
Lula	2,040	2,230	1,582	1,849	2,765	1,645
Cultured Shrimps	4,430	5,040	6,836	6,028	4,630	8,180
Freshwater prawns	540	460	374	705	890	1,340
Cultured Milk fish & Sea bass	90	70	78	174	290	515
Other wild fish	7,720	5,820	5,604	9,973	10,215	11,155
Total	66,910	75,750	67,300	73,930	81,870	87,690

Source: Ministry of Fisheries and Aquatic Resources

Stocking and releasing of fingerlings into inland water bodies had contributed significantly to increase of inland fisheries production. Table 4 shows the fingerlings and freshwater prawn post larvae stockings to inland water bodies in 2018.

Table 4: Fingerlings and Freshwater Prawn Post Larvae Stocked in Inland Water Bodies in 2018

Type of Water body	Fish Fingerlings		Freshwater Prawn Post Larvae	
	No. of Tanks / Units	Stocks (Million)	No. of Tanks / Units	Stocks (Million)
Major Reservoirs	41	30	30	22
Medium Reservoirs	78	31	48	25
Minor Reservoirs	288	33	132	23
Seasonal Tanks	491	9	3	0.1
Ponds	1,170	3	36	0.6
Other*	-	3.7	8	3
Total	2,068	109.7	257	73.7

*Other: Lagoons/Villu/Cages

Source: Ministry of Fisheries and Aquatic Resources

The National Aquaculture Development Authority (NAQDA) had released nearly 110 million of fingerlings in to different type of water bodies: major, medium, minor reservoirs and seasonal tanks in 2018. Out of them minor reservoirs were predominant and about 30% of fingerlings had released into them.

In aquaculture fish production cultured milk fish, sea bass, shrimp and freshwater prawn production had significantly increased by 78, 77 and 51% respectively in 2018 compared to 2017.

2. Trade and Marketing

Fish and fishery products of Sri Lanka are traded both in the domestic and international markets. Marketing channels in the domestic market are comprised of assembler, commission agent and retailer while export channel from agent, processor and exporter. In recent past few regional wholesale markets has emerged in suburbs making new channels to the system. Sri Lanka has a global recognition as a quality tuna exporter. The major export destinations of Sri Lankan fish and fishery products were Europe and America. Sri Lanka imports a considerable amount (84,463 MT) of fresh fish and fishery products specially dried fish (38%) to cater the excess local demand in the country from China, Maldives, India and Pakistan.

2.1 Export of Fish and Fishery Products

Europe, America and Asia markets remain the major export destinations for Sri Lankan fish and fishery products. All fish and fishery products exported categorized under the (HS) code 03. Accordingly products has been categorized into live fish, fish fresh or chilled, frozen fish, fish fillets and other fish meat, dried, salted or in brine, crustaceans, molluscs and aquatic invertebrates other than crustaceans.

Sri Lanka had exported 27,998 MT of fish and fishery products worth Rs. 47,948 million in 2018. The quantity exported had increased 13% while earnings 22% compared to 2017. Exported quantity and value for 2013 to 2018 are shown in table 5 while Figure 02 and Figure 03 show the percentage value of exported quantity and value according to the variety of fish for 2018.

Table 5: Exports of Fish and Fishery Products (Quantity and Value), 2013-2018

	2013	2014	2015	2016	2017	2018
Quantity (MT)	23,911	26,320	17,461	17,593	24,827	27,998
Value (Rs. Million)	31,792	34,796	24,716	26,801	39,230	47,948

Source: Ministry of Fisheries and Aquatic Resources

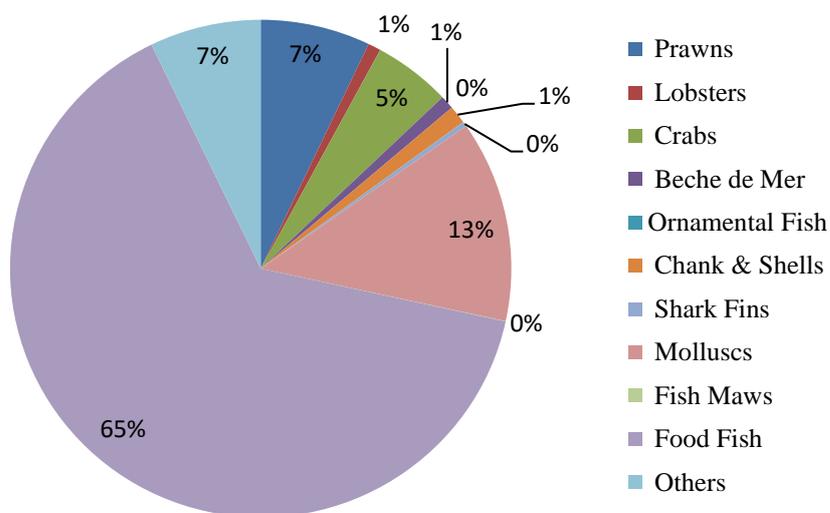


Figure 2: Percentage Values of Exports Quantity in 2018

Source: Ministry of Fisheries and Aquatic Resources

Note: Ornamental fish or live fish are export in water containers. Hence their quantity cannot be estimated

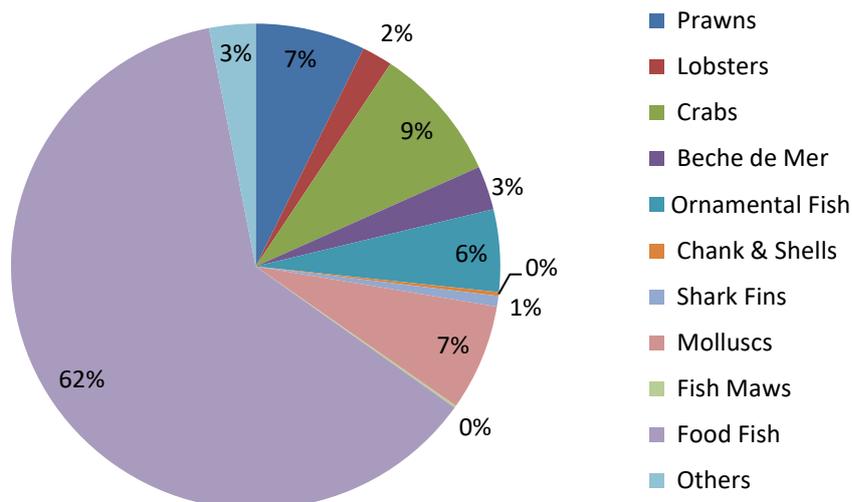


Figure 3: Percentage of Export Earnings in 2018

Source: Ministry of Fisheries and Aquatic Resources

2.2 Import of Fish and Fishery Products

Sri Lanka imports variety of fish and fishery products: canned fish, maldivian fish, dried fish and sprats to cater the demand of sea foods at the local markets. Sri Lanka had imported 84,463 MT of fish and fishery products which valued Rs. 32,726 million in 2018 but had shown decreased of 21,557 MT (20%) valued Rs.32,726 million (4%) compare to 2017. The figures 4 and 5 depicted percentage value of imported quantity and valued by variety in 2018. Dried fish followed by canned fish were major fishery products imported in 2018.

Table 6: Imports of Fish and Fishery Products (Quantity and Value), 2013-2018

	2013	2014	2015	2016	2017	2018
Quantity (MT)	78,400	78,712	120,046	115,693	106,020	84,463
Value (Rs. Million)	21,119	18,861	30,729	35,173	33,969	32,726

Source: Ministry of Fisheries and Aquatic Resources

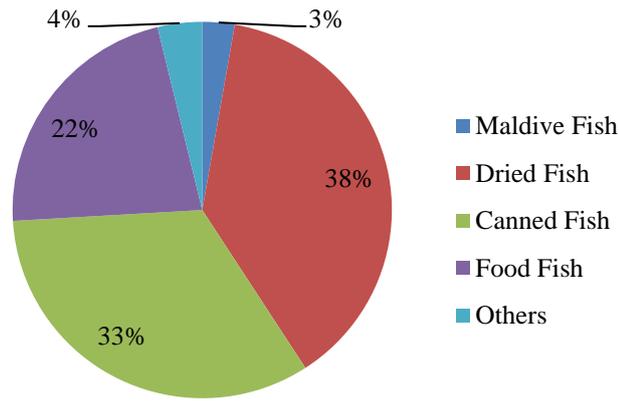


Figure 4: Fish and Fishery Products Imports Quantity (MT) in 2017

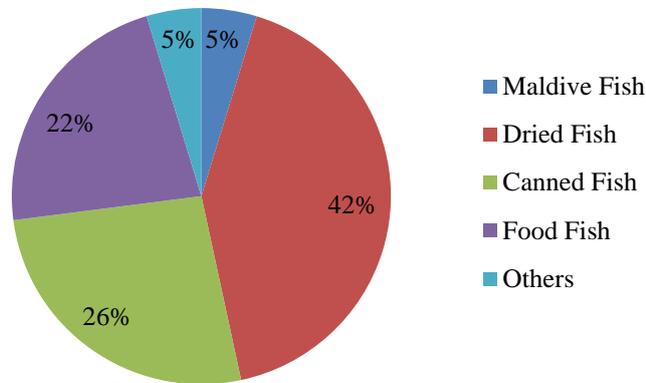


Figure 5: Fish and Fishery Products Imports Value (Rs.) in 2017

Source: Ministry of Fisheries and Aquatic Resources

2.3 Local fish trading

Both private and government sector involve in local fish trading in Sri Lanka. The local fish market comprise of urban wholesale fish markets, retailers, fish vendors, Ceylon Fisheries Corporation (CFC) and supermarket outlets. St. John’s fish market (SJM) in Colombo is the largest wholesale market and domestic fish trading hub in Sri Lanka. Secondary regional wholesale fish markets exist in the towns of Galle, Kandy and Anuradhapura. In addition considerable amount of fish trading occurs through retailers. CFC is the state organisation which plays a dominant role in capture, marketing, and export of fish and fishery products in Sri Lanka. Table 7 shows the CFC intervention in fish trading during 2010 – 2017.

Table 7: CFC Intervention in Fish Trading 2010-2017

Fish Sales (MT)					Fish Purchases (MT)						
Year	Laksathosa outlets & co-op city	Hospitals	CFC OUTLETS Mobile Truks, Vans etc	Total	Wholesale market operation Dev & Colombo region	Foreign Vessels	Landing Centres	Private suppliers	Inland Fish	Import	Total
2010	256	338	2864	3458	998	515	1262	416	21	336	3548
2011	510	200	4035	4745	1209	694	1787	1017	29	243	4979
2012	429	232	3949	4610	1178	980	1799	838	-	71	4866
2013	255	201	3521	3977	1230	1212	-	1328	-	478	4248
2014	172	202	3565	3939	736	872	1893	466	-	148	4115
2015	54	193	3414	3661	791	-	1977	396	-	102	3266
2016	159	196	3506	3861	478	-	2409	732	-	-	3619
2017	133	222	3027	3382	493	-	2598	680	-	-	3771

Source: Ministry of Fisheries and Aquatic Resources

Currently there are 96 CFC retail outlets and most of them were located in the Western province of the country. The distribution of CFC retail outlets, CFC purchasing and sales regions were given in annexure 10 & 11 respectively.

3. Canned Fish Production

Canned fish was one of the major items in the food basket of the fish and fishery products consumers. Canned fish constituted about 33% and 26% to total imported quantity and value in 2018. Sri Lanka had imported 28,068 MT with valued at Rs. 8,616 million canned fish in 2018. It was recorded decreased in quantity imparted and value by 12 546 MT (31%) and Rs. 990 million (10%) respectively compared with 2017. In order to meet the canned fish demand public and private sector jointly had initiated canning of fish locally. Accordingly, the first fish canning factory was established in 2012 in Galle with the capacity of producing 10,000 cans per day. Second factory was established in Paliyagoda by TESS group of company with a daily

production capacity of 24,000 cans. At present, there are six fish canning factories operating in the country and the total number of cans produced in 2018 was 6.4 million.

Quantity of canned fish imported dramatically increased in 2015 and this may be due to the reduction of import duty levied on canned fish by more than 50% by the government. Figure 6 shows locally produced and imported canned fish from 2014 to 2018.

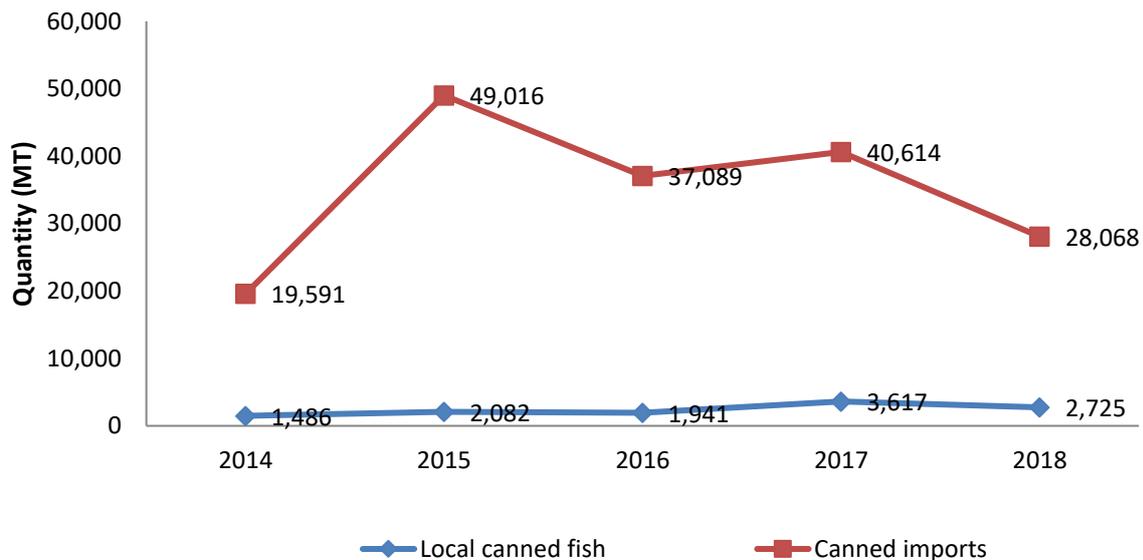


Figure 6: Local canned fish production and imports, 2014 - 2018

Source: Ministry of Fisheries and Aquatic Resources

4. Price of Fish

Fish prices are frequently subjected for fluctuations but showed an increasing trend over the years. Many factors influence the supply of fish to the markets including seasonality. Demand for fish is influenced by consumers' perception, purchasing power, quality of fish *etc.* Generally, small varieties, Salaya and Hurulla are low value species while seer, sailfish, travelly and yellow fin tuna are high value species in marine fisheries. Tilapia species in fresh water fisheries are high value species.

The highest wholesale and retail price was recorded for seer (thora), the difference between retail and wholesale price (margin) was Rs.295 in 2018.In addition sail fish and prawns had fetched a reasonable higher price at the market. The difference between the retail and wholesale prices were Rs.478 and 203 respectively in 2018. Figure 6 shows the difference in retail and wholesale price of selected fish species in 2018.

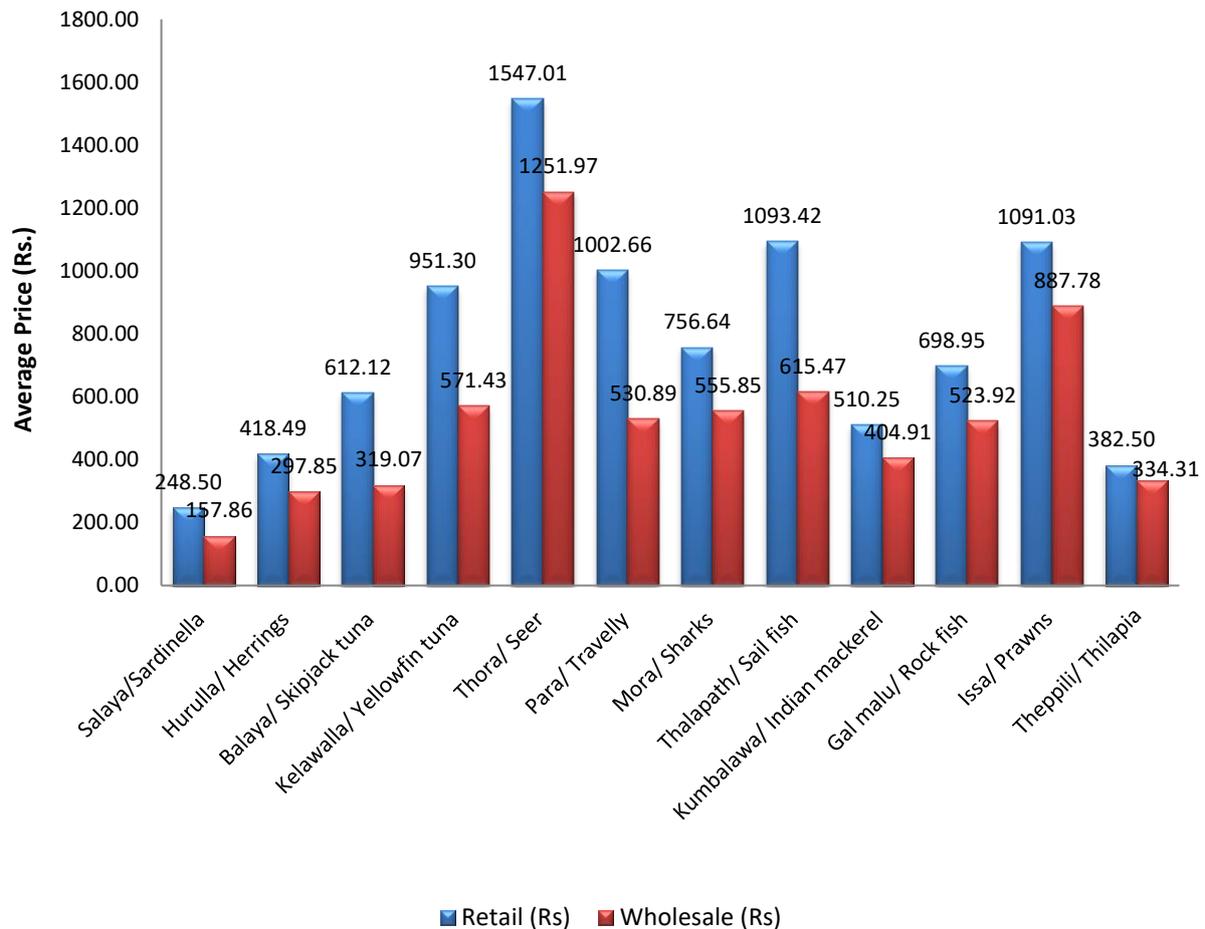


Figure 7: Retail and Wholesale Price of Fish in 2018

Source: Ministry of Fisheries and Aquatic Resources

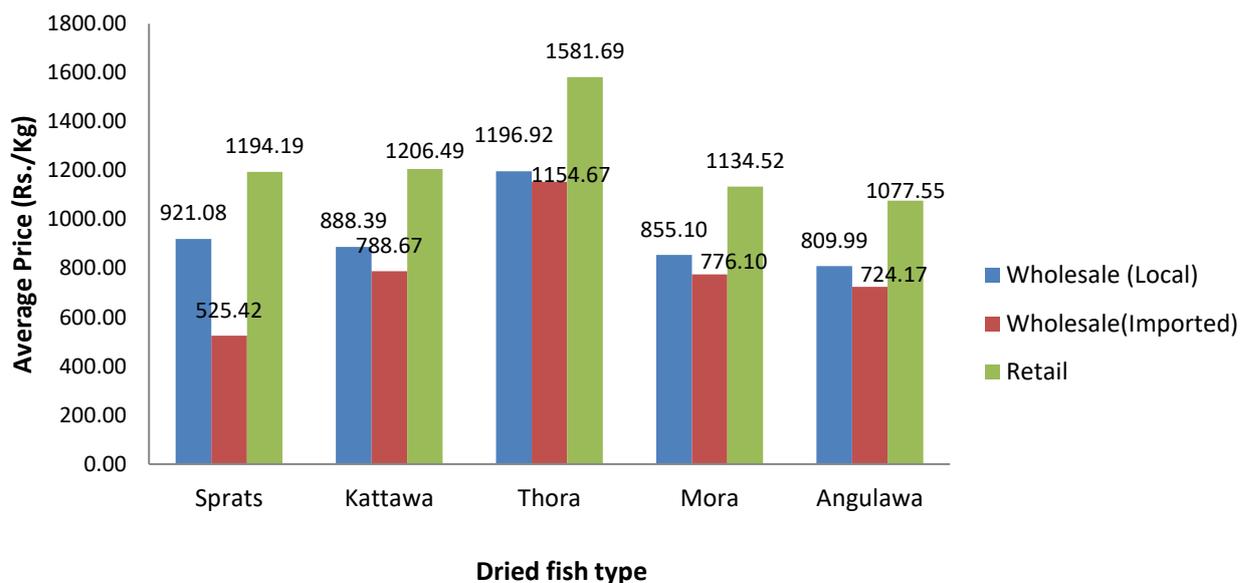


Figure 8: Average Retail and Wholesale Price of Dried Fish in 2018

Source: Ministry of Fisheries and Aquatic Resources

The average wholesale price of locally produced dried fish was higher than imported dried fish that shows in Figure 08. Among the both locally produced and imported dried fish varieties, the highest wholesale price was recorded for dried seer (Thora), the difference between retail and wholesale price (margin) for locally produced and imported dried seer were Rs.385 and Rs.427 respectively.

5. Consumption of Fish and Fishery Products

A unique combination of high quality protein content and comparatively affordable price made fish is the most important animal protein source for the people in many developing countries including Sri Lanka (Food and Agriculture Organization, 2015). Fish, fresh, dried and canned, are popular seafood among consumers that contributed nearly 56.1 % of animal protein consumed in Sri Lanka (FAO, 2011). The per capita fresh, dried and canned fish consumptions were 11.8, 3.6, 1.4 kg/year respectively. During the past decade, per capita fresh fish consumption has increased by 30% in the country. During the same period, although dried fish

consumption had shown a 9% decline the canned fish consumption had doubled and shows in Table 7.

Table 8: Per Capita Consumption of Fresh, Dried and Canned Fish (kg/year)

Item	2006/2007	2009/2010	2012/2013	2016
Fresh Fish	9.1	10.8	10.9	11.8
Dried Fish	3.9	3.8	3.6	3.6
Canned Fish	0.7	0.7	0.6	1.4

Source: Ministry of Fisheries and Aquatic Resources

6. Fisheries Affiliated Industries

The role of fisheries affiliated industries, upstream and downstream, is crucial and has direct impacts on sustainable development of the fisheries industry in the country by producing inputs: production related and infrastructure related inputs. Fishing crafts/boats, fishing gear and ice are major production related while harbors, anchorages and landing centres are infrastructure related inputs.

6.1 Fishing Crafts/Boats

Different types of fishing crafts/boats are operating in fisheries and are classified into 6 groups for the administrative purposes by the Ministry of Fisheries and Aquatic Resources as Inboard Multi-day Boats (IMUL), Inboard Single-day Boat (IDAY), Out-boat Engine Fiberglass Reinforced Plastic Boats (OFRP), Motorized Traditional Boats (MTRB), Non-Motorized Traditional Boats (NTRB) and Inland fishing crafts. Total number of operating fishing crafts/boats in year 2018 was 60,386 and of them 50,591 was in marine fisheries while 9,795 were in inland fisheries. Majority of marine fishing crafts/boats were OFRP (24,132) and NTRB (17,434). OFRP and NTRB are operated in coastal fisheries while IMUL in deep-sea fisheries. Table 8 shows the composition of fishing crafts/boats operating in marine and inland fisheries over the years and figure 9 shows the operating fishing boats by fisheries district in 2018.

Table 9: Operating Fishing Crafts/Boats 2014 – 2018

	2014	2015	2016	2017	2018
Marine Fishing Fleets	52,609	50,338	50,669	46,890	50,591
<i>High Seas IMUL</i>		1,612	1,407	1,346	1,281
<i>Other IMUL</i>	4,447	2,606	2,589	2,850	3,300
<i>IDAY</i>	876	719	786	868	918
<i>OFRP</i>	23,982	24,028	24,282	22,394	24,132
<i>MTRB</i>	2,720	1,872	1,839	2,185	2,206
<i>NTRB</i>	20,584	17,813	17,853	16,035	17,434
<i>NBSB (Beach Seine Craft)</i>	1,379	1,688	1,913	1,212	1,320
Inland Fishing Crafts	8,536	8,778	9,661	9,745	9,795
Total Fishing fleets	61,145	59,116	60,330	56,635	60,386

Source: Ministry of Fisheries and Aquatic Resources

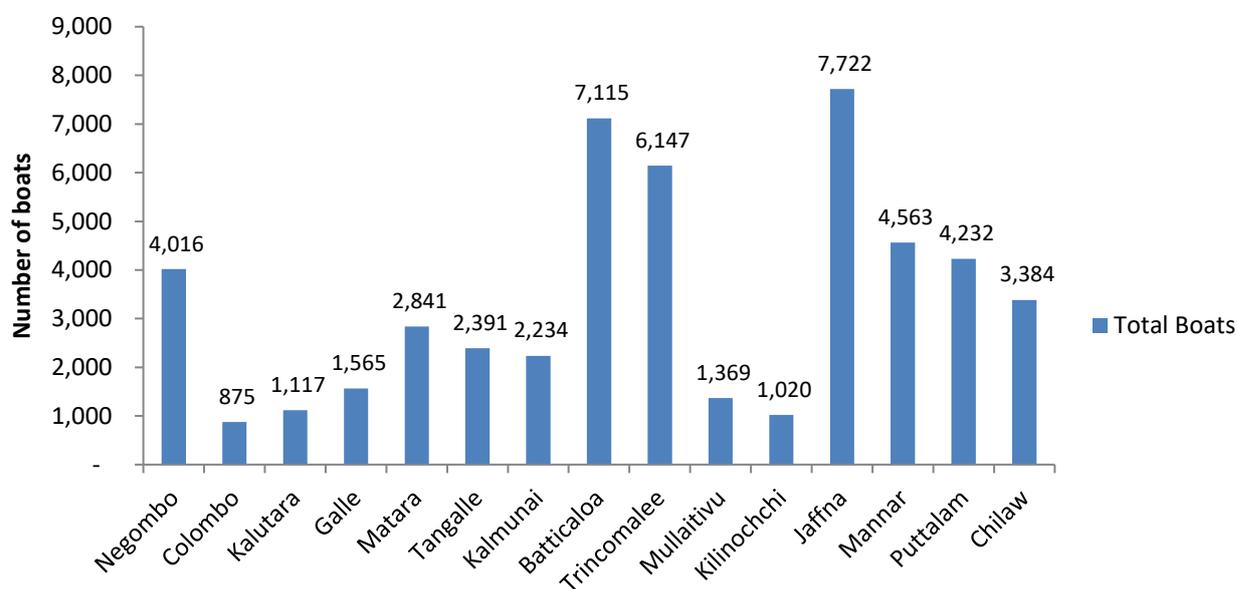


Figure 9: Operating Fishing Boats by Fisheries District in 2018

Source: Ministry of Fisheries and Aquatic Resources

6.2 Ice Production

Utilization of ice is the main preservation technique that used by fishers and intermediaries for maintaining of the quality of fish. Two types: block and flack ice commonly used and of them block ice; 50 kg, is major but the number of blocks used, at a time, varies according to the types of the boat/craft, distance to fishing grounds and number of fishing days at sea. MTRB and NTRB crafts rarely used ice at the time of fishing operation due to intrinsic nature of operation.

There were 94 ice plants in operation in 2018 in the country having production capacity of 3,310 MT per day (MFARD, 2018). The quality of ice mainly depends on quality of water used and mainly concerned by the users because it effects on quality of fish stored. Figure 10 shows the production capacity of ice plants per day by districts.

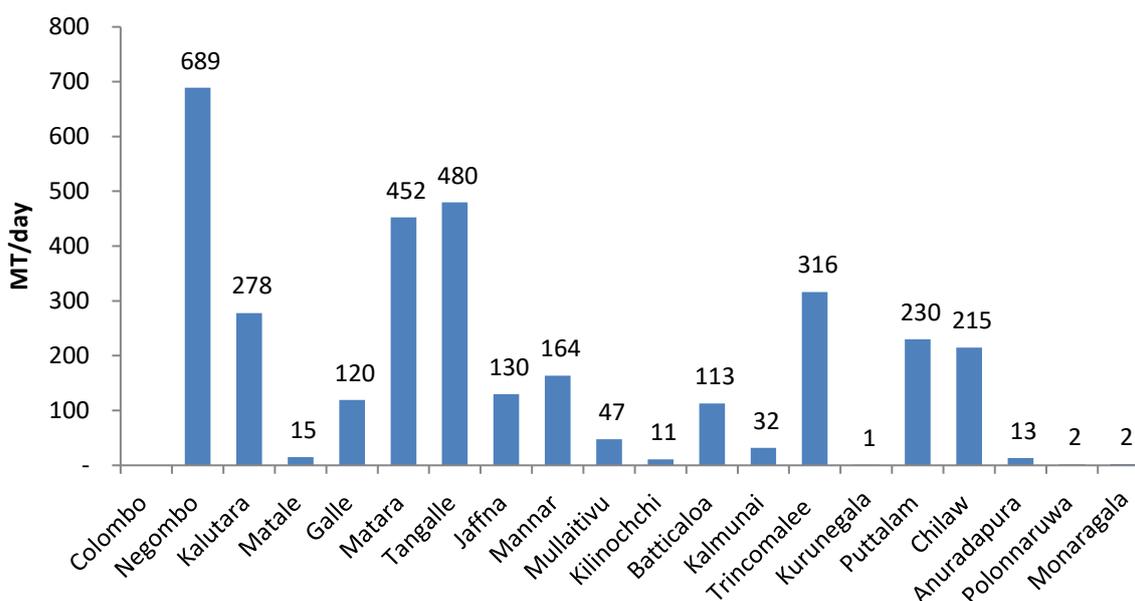


Figure 10: Production Capacity of Ice Plants per Day by Fisheries Districts in 2018

Source: Ministry of Fisheries and Aquatic Resources

Ice plants with the highest daily capacity (21%) were located in and operation in Negombo fisheries district.

6.3 Net Production

Drift Gill nets, major fishing gear, which used by fishers in harvesting resources shown an increasing trend of demand year by year. In year 2017, totally 247,240 Kg worth of Rs. 202.8 million had produced by Lunuwila, Weerawila and Gurunagar net factories. Total annual estimated demand of fishing nets is nearly 4,456 metric tons which unable to fulfil only through locally production. To fulfil local demand fishing nets are been imported mainly from china. Table 9 shows the production quantities and values of nets by registered net producers under MFAR over the years 2012 to 2017.

Table 10: Production Quantity and Value of Nets in 2012 - 2017

Year	Quantity (Kg)	Total Value (Rs.Million)
2012	134,810	167.4
2013	147,260	144.9
2014	280,320	300.1
2015	193,829	162.9
2016	156,700	185.1
2017	247,240	202.8

Source: CEYNOR Foundation Ltd, North Sea Limited

7. Fishery Harbours and Anchorages

Well-equipped fishery harbours and anchorages are essential for the development of fishery industry as well as safety of fishers and crafts/boats. Fishery harbours and anchorages of the country totally developed and managed by Ceylon Fisheries Harbour Cooperation (CFHC). There are 21 functioning fishery harbours and 58 anchorages through the coastal belt of the country. At the aim of strengthening of facilities at fisheries harbours, upgrading of 6 harbours are in progress and 8 new harbours are proposed to establish.

8. Socio- economics

Although fisheries industry contributes 1.2 percent to the total Gross Domestic Production (GDP) of the country in 2018, it plays a major role in providing livelihoods, over 2 million people either directly or indirectly at present. Industry provides 279,720 direct employments as active fishers in 2018 (MFAR, 2019). There were 181,880 marine fishing households and 56,250 inland fishing households by 2018.

Table 11: Social Indicators Related to Fisheries Industry in 2016– 2018

		2016	2017	2018
1. Fisheries Inspector Divisions (Marine)	Numbers	148	149	149
2. Marine Fishing Households	Numbers	188,685	183,650	181,880
3. Marine Fishers (Men & women)	Numbers	218,830	220,870	218,130
4. Marine Fishing Household Population	Numbers	827,480	802,340	795,190
5. Fisher Organizations (FO) - Marine	Numbers	802	808	977
6. Fisher Organizations (FO) - Inland	Numbers	287	319	434
7. No. of Memberships in FO - Marine	Numbers	85,208	86,347	83,518
8. No. of Memberships in FO - Inland	Numbers	12,155	12,401	21,852

Source: Ministry of Fisheries and Aquatic Resources

9. Welfare of Fishermen

The government had launched welfare and social security programmes to enhance the socio-economic status of fishers and their dependents.

Divi Saura Life Insurance Scheme

Life insurance of fishers is particularly important because fisherman or his family is financially compensated in the case of deaths or disability of fishers and tremendously assist towards securing the livelihoods. The ‘Divi Saura Life Insurance Scheme’ has launched by the Ceylinco Insurance with the coordination of the Department of Fisheries and Aquatic Resources to cover the all life accidents (insured deaths, partial or permanent disability and disappearance) which may occur at sea and on the land. The total insurance premium should be paid by the fisher per year is Rs.1036.00. Beneficiaries are compensated a sum of Rs.

200,000 for a natural death while they are offered Rs. 1,000,000 for insured's death, partial or permanent disability by accident. The number of fishing families which have obtained benefits from this insurance scheme for the year 2018 was 58.

One Million Insurance for Accidental Deaths of fishers

Fishing is one of the high-risk occupations due to unpredictable changes of sea conditions, long hours of work in the harsh and the difficulty to reach the shore quickly. Considering this situation, this accidental insurance scheme has been introduced for the fishermen free of charge by the government in 2016 with coordination of the Department of Fisheries and Aquatic Resources and National Insurance Trust Fund. Under this programme, 1 million insurance is given to the dependents of fisherman who died due to the accidents or disasters occurred during the fishing operations. 14 beneficiary families have compensated by the National Insurance Trust Fund during this year.

Diyawara Diriya Loan Scheme

The government has assisted the fishing communities by channelling considerable amount of funds to the fisheries sector in the form of subsidies. Diyawara Diriya is one of the subsidy loan schemes offered to the fishers in order to increase the total fish production of the country, encourage the fishers to explore the unexploited fish resources and minimize the post harvest loss by introducing new technology. Diyawara Diriya low interest loan scheme is being launched by the Department of Fisheries and Aquatic Resources together with the Bank of Ceylon. The maximum amount of Rs.15 million is granted under this loan and the interest rate is as follows.

- If the amount of loan is less than Rs. 2 million, 7% interest rate is charged from the borrower
- If the amount of loan is more than Rs. 2 million, 9% interest rate is charged from the debtor.
- 4% interest rate is subsidized for each fisherman by the government
- Priority is given for the improvement of fishing vessels, construction of fishing vessels over 55 ft in length, provision of new technology enhancements (RSW, CSW) and installation of longlines and winch machines
- A sum of Rs. 1265.58 million has been granted to 513 beneficiaries

Diyawara Piyasa Housing and Sanitary Facilities Improvement Programme

Housing and sanitary facilities have been provided to poor and displaced fishermen by Ministry of Fisheries and Aquatic Resources for the last seven decades since the independence. Diyawara Piyasa Housing and Sanitary Facilities Improvement Programme were started in 2017 with the intention of providing housing and sanitary facilities for the fishers who lack proper housing in their fishing villages. Beneficiaries have granted Rs.3 lakh for constructing a new house while they have granted Rs. 1 lakh for renovating a house. In addition, under this project, a sum of Rs.30,000 has granted to a fishing family who has not sanitary facilities for the construction of new toilet and Rs. 15,000 has granted to renovate the existing one. At the beginning, three model housing projects were initiated at Kirimundalama in Puttalam, Sagarapura in Trincomalee and Viharamahadevipura in Tangalle. In 2018, a sum of Rs. 38.4 million has allocated to renovate houses for 427 fishing families and to provide sanitary facilities for 371 fishing families. Expenditure on housing and sanitary projects in 2018 is higher than year 2017.

Construction of fishing vessels over 55 ft in length under 50% subsidy scheme

Among various social welfare and security measures, 50% subsidy scheme was launched by the government with the recognition of the necessity of building fishing boats over 55 feet in length and equipped with modern devices with a view to providing high quality and high fish yield. In the year 2018, Rs. 400 million has been granted for the production of over 55 feet boats.

Granting 50% subsidy to upgrade new technology in fishing crafts

The total allocation for this programme in 2018 was Rs. 175 million. Under this programme, 50% subsidy has granted for providing long lines, winch machines and cooling systems to upgrade new technology in fishing crafts. The progress of this subsidy is mentioned as below.

Activity	No.of.beneficiaries	Allocation (Rs.M)
Providing long lines	156	52
Providing winch machines	47	30
Upgrading cooling systems	20	93

Source: Department of Fisheries and Aquatic Resources

Lagoon Development Programme

Ministry of Fisheries and Aquatic Resources has implemented the Lagoon Development Programme to conserve the lagoon ecosystem and to upgrade the socio-economic and livelihood status of fishers. Under this programme, it was proposed to develop 18 lagoons out of the identified 116 lagoons. Puttalam, Rekawa, Panama, Nayaru and Arugambe lagoons are prioritized among them. The key sub projects are to be implemented under this programme as follows.

- Demarcation of lagoon boundaries
- Promoting environmental friendly fishing gears instead of illegal fishing gears
- Increase production capacity of lagoons
- Development of infrastructure facilities around the lagoons
- Livelihood development projects

Development of Infrastructure Facilities

Some of the other welfare measures that implemented by the government are infrastructure development programmes such as improvement of landing sites, supply of beacon lamps, upgrading fish sales outlets, access to roads, constructing of net manufacturing centres, community halls. In the year 2018, Rs.92 million has been granted for the development of infrastructure facilities that contributes to the poverty alleviation.

Fisheries Information Centre of NARA

National Aquatic Resources Research and Development Agency (NARA) established the Fisheries Information Centre (FIC) of NARA in 2013 to provide timely and accurate information on fisheries related problems for all Stakeholders. By the end of the year 2018, over 1000 queries were received through the Hotline: 0710101010 from different type of respondents. This service has categorized under five areas such as trade and investment related services, general complaints and comments, fishermen welfare and disaster related services, academic and research and consumer and industry related services. This service is much popular among fisher community.

Skill Development Programmes

Skill development helps for enhancing the socio-economic status of the fishing community. Skipper training programme for multiday boat skippers was launched by National Aquatic

Resources Research and Development Agency (NARA) in 2016 with the assistance of the Ocean University of Sri Lanka and it is still in progress. 200 skippers of multiday fishing boats have successfully completed the training programme. Presently a training program, conducted by NARA with a help of an outside instructor, on mechanical training for OBM operators is in progress and had trained 85 fishers.

10. Forecasts of Scenarios

Total fish production, fish import and export of Sri Lanka were forecasted for 2019 to 2025 using time series data analysis.

10.1 Total Fish Production Forecast

Forecast values show an increasing trend in total fish production during the period of 2019 to 2025. The total fish production is forecast to rise 27% to 666,794 MT by 2025 compared to the 2018. Further, it is projected that total fish production would increase by 3, 7, 10, 14, 18 and 22% in 2019, 2020, 2021, 2022, 2023 and 2024 respectively. Table 11 shows the total fish production forecast for 2019 to 2025. Figure 11 shows the actual total fish production in the country from 1985 to 2018. Figure 12 shows the forecast of total fish production for 1985 to 2025.

Table 12: Total fish production forecast for 2019 to 2025

Year	Forecast total fish production (MT)	Lower limit	Upper limit
2019	543,863	504704	583021
2020	561,943	521484	602402
2021	581,100	539261	622939
2022	601,214	557927	644501
2023	622,219	580380	667018
2024	644,082	597709	690455
2025	666,794	618785	714803

Error = 7.2 %

Model = ARIMA 1,1,1

Source: SED/NARA,2019

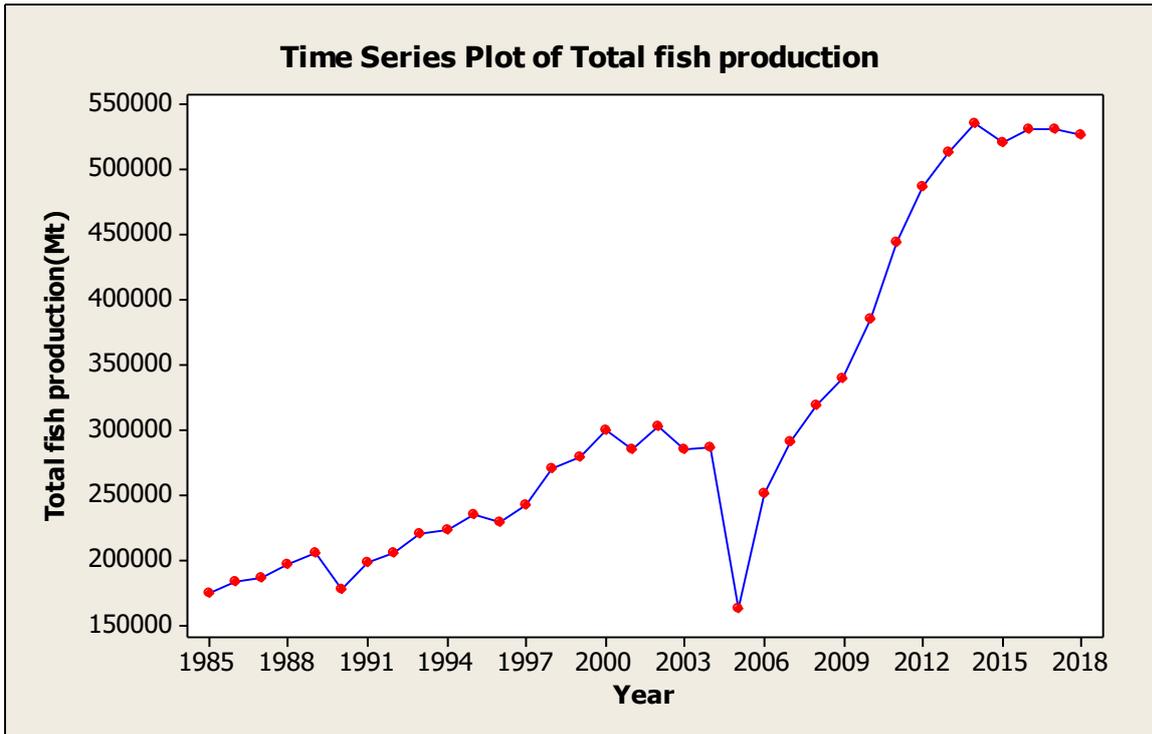


Figure 11: Total Fish production from 1985 – 2018

Source: SED/NARA, 2019

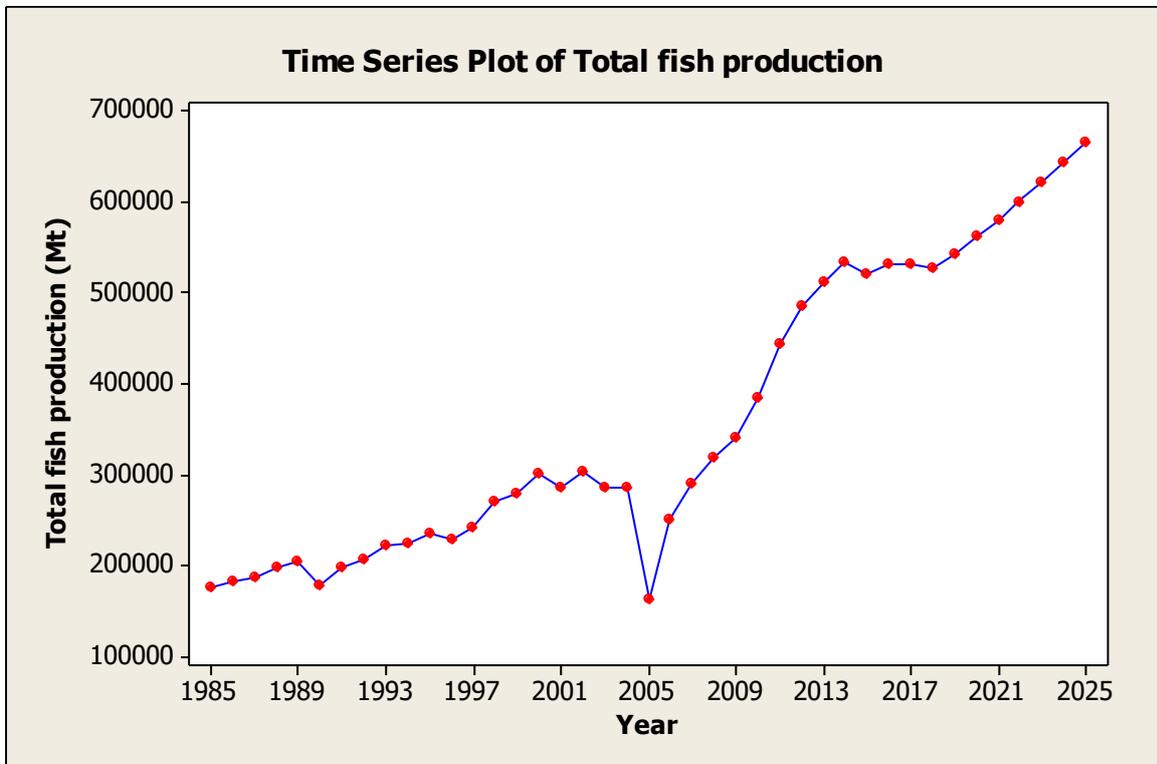


Figure 12: Total fish production forecast for 1985 – 2025

Source: SED/NARA, 2019

10.2. Trade Forecast

10.2.1 Export

The quantity of fish export is projected to decrease with a rate of 10.4% in 2019 to 25,091 MT from 27,998 MT in 2018. According to the forecast values, fish export would gradually increase up to 27,919 MT by 2025 from 25,091 MT in 2019. In overall, fish export would be more or less constant in 2025 compare to 2018. Table 12 shows the fish export forecast for 2020- 2025. Figure 13 shows the actual total fish export quantities from 1972 to 2018. Figure 14 shows the fish export forecast for 2020-2025.

Table 13: Fish Export Forecast for 2020-2025

Year	Quantity (MT)		
	Forecast	Lower	Upper
2019	25,091.0	19,828.0	29,754.0
2020	25,245.3	20,191.0	30,299.5
2021	25,780.2	20,435.5	31,124.8
2022	26,315.1	20,695.0	31,935.2
2023	26,850.0	20,967.3	32,732.6
2024	27,384.9	21,250.9	33,518.8
2025	27,919.8	21,544.4	34,295.2

Error = 9%

Model = ARIMA 0,1,1

Source: SED/NARA, 2019

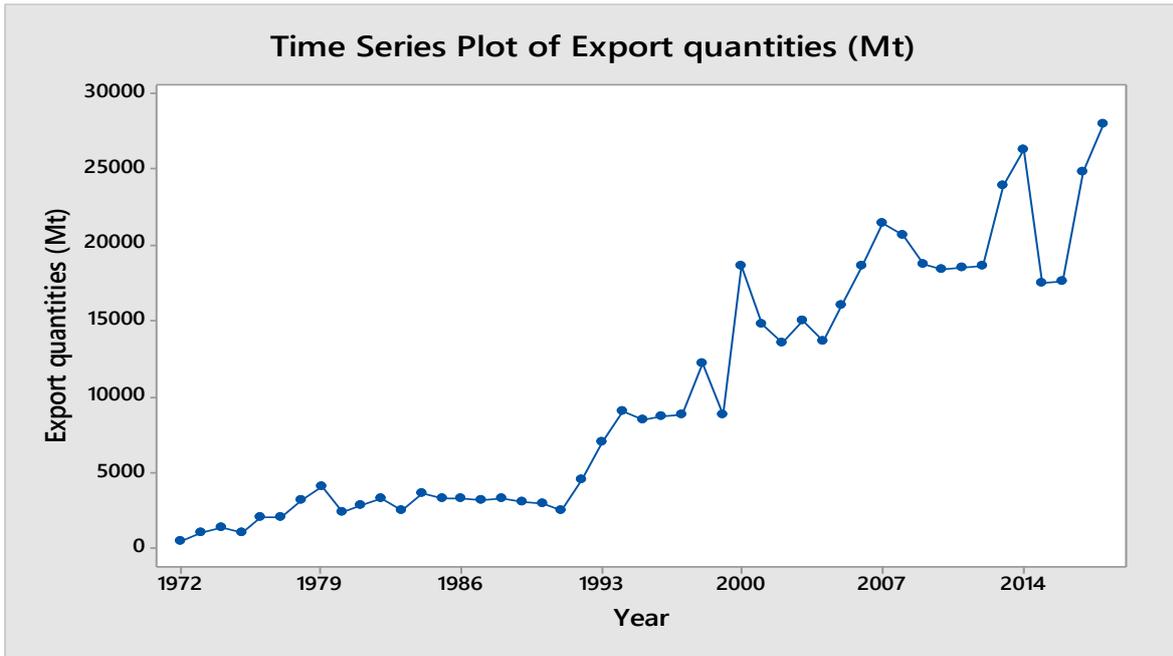


Figure 13: Total Fish Export Quantities from 1972 - 2018

Source: SED/NARA, 2019

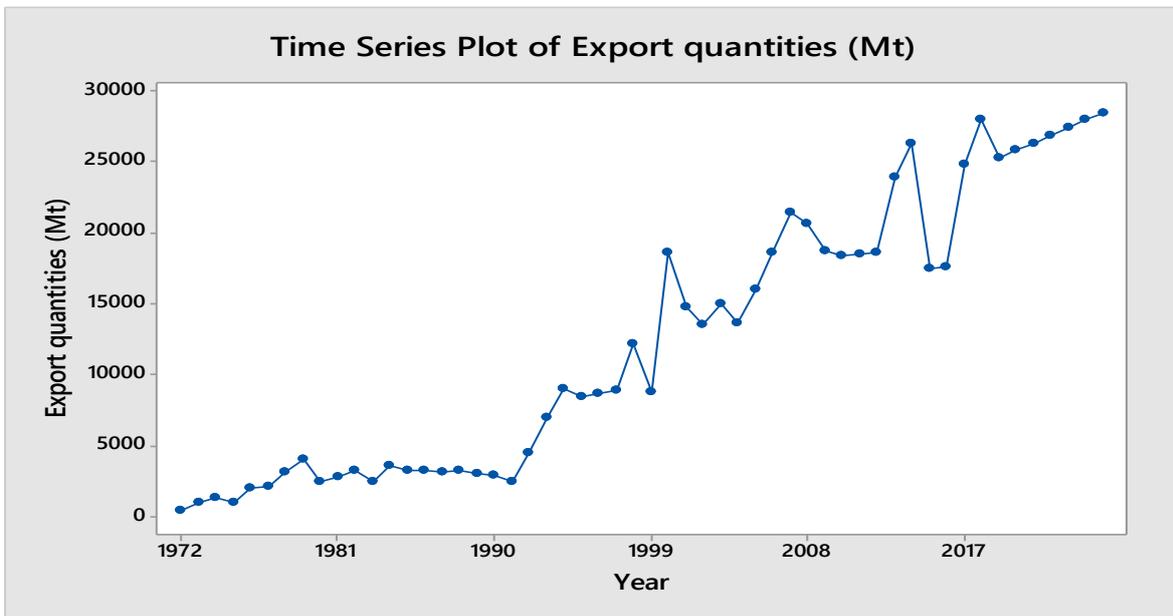


Figure 14: Total Fish Export Quantities Forecast for 1972 - 2025

Source: SED/NARA, 2019

10.2.2 Import

The quantity of fish import is projected to rise by 3% in 2019 to 86,829 MT from 84,463 MT in 2018. According to the forecast values, fish import would rise by 5, 6, 4, 5, 20 and 24% in 2020 to 2025 respectively compared to 2018. Table 13 shows the fish import forecast for 2020- 2025. Figure 15 shows the actual total fish export quantities from 1972 to 2018. Figure 16 shows the fish export forecast for 2020-2025.

Table 14: Fish Import Forecast for 2019 - 2025

Year	Quantity (MT)		
	Forecast	Lower	Upper
2019	86,829	97,249.0	76,410.0
2020	88,421	99,031.5	77,810.4
2021	89,522	100,264.6	78,779.3
2022	87,482	97,979.8	76,984.1
2023	88,302	98,898.2	77,705.7
2024	101,003	113,123.4	88,882.6
2025	104,348	116,869.8	91,826.2

Error = 12%

Model = ARIMA 1,1,0

Source: SED/NARA, 2019

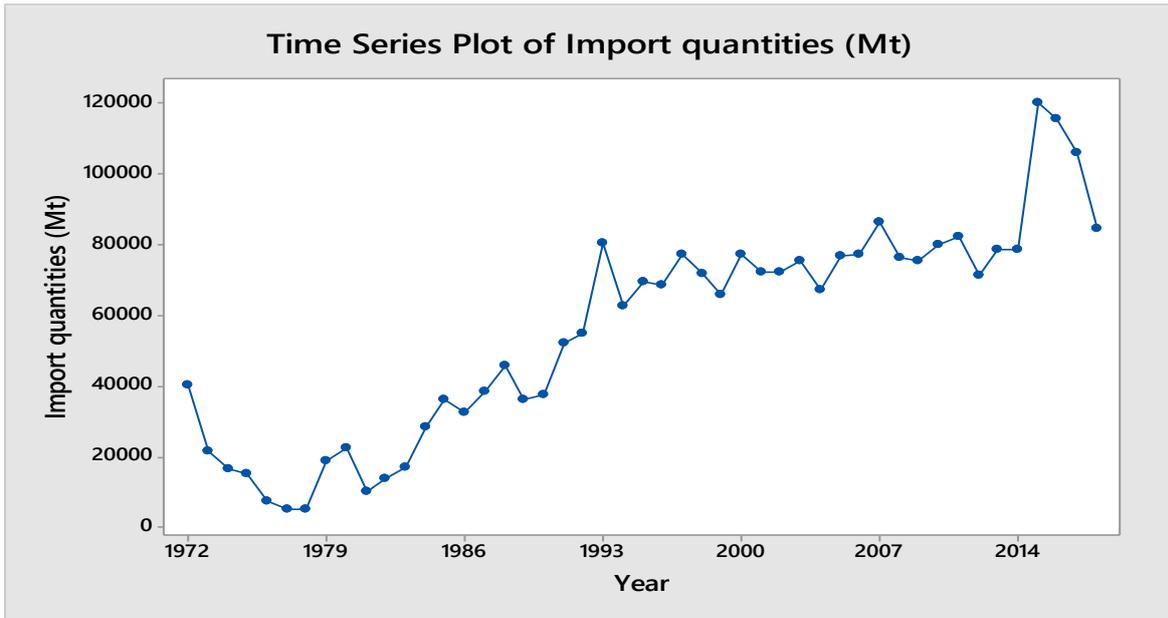


Figure 15: Fish Import quantities from 1972 - 2018

Source: SED/NARA, 2019

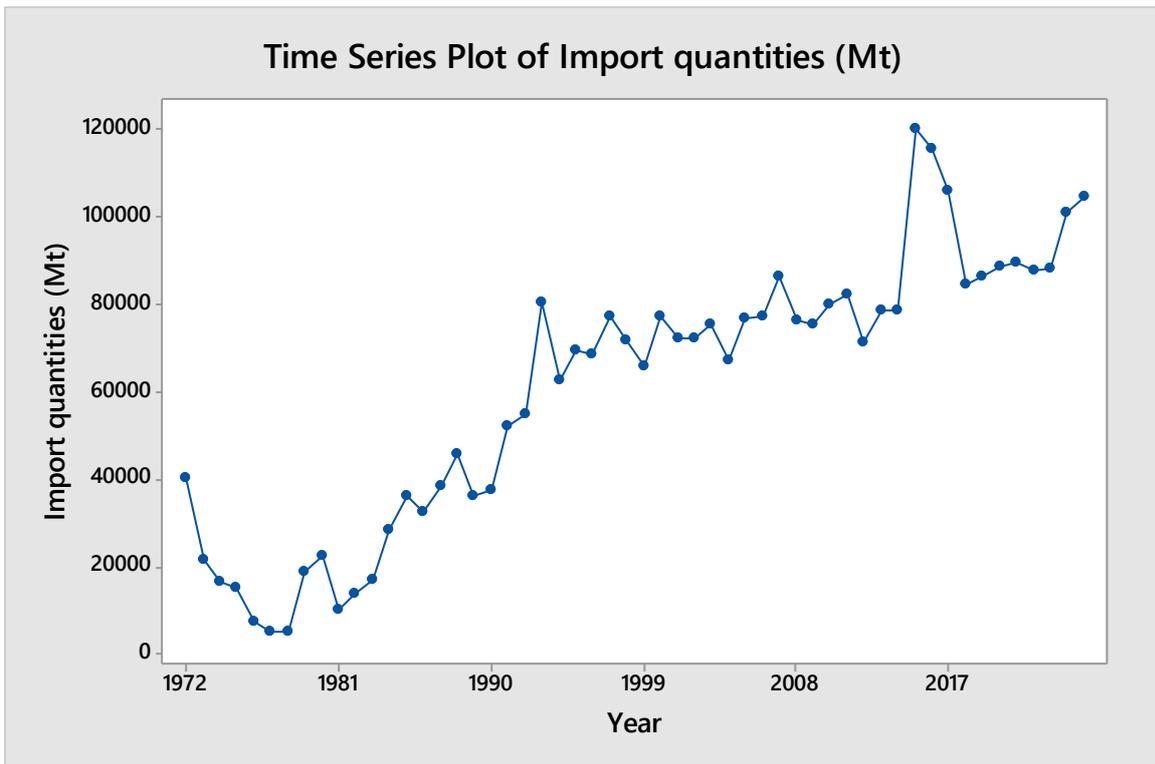


Figure 16 : Fish Import Quantities Forecast for 1972 - 2025

Source: SED/NARA, 2019

11. World Fisheries

Table 15: Global Fish Production in million MT

Category	2011	2012	2013	2014	2015	2016
Production						
Capture						
Inland	10.7	11.2	11.2	11.3	11.4	11.6
Marine	81.5	78.4	79.4	79.9	81.2	79.3
Total capture	92.2	89.5	90.6	91.2	92.7	90.9
Aquaculture						
Inland	38.6	42.0	44.8	46.8	48.6	51.4
Marine	23.2	24.4	25.4	26.8	27.5	28.7
Total aquaculture	61.8	66.4	70.2	73.7	76.1	80.0
Total world fisheries and aquaculture	154.0	156.0	160.7	164.9	168.7	170.9

Source: FAO, 2018

Global fish production has been increasing over the years and had reported 170.9 million tonnes by end of 2016. Capture fish production had contributed 53% to the total global fish production of the same year. China, USA, Russia and Peru were the top marine capture fish producing countries where as China, India, Myanmar and Bangladesh included as top inland water capture fisheries producing countries in 2016.

12. Research Findings: Cost of Production

Table 16: Annual Averages of Catch, Income, Variable Cost, Gross and Net Profit (Rs.)

Description	Deep Sea Fishery (Boat Length Categories ft.)			Coastal Fisheries (Boat Types)		
	28-32	33-40	41-60	OFRP	MTRB	NTRB
Catch (Kg)	21,713	27,041	32,584	5,790	3,497	1,451
Income (Rs.)	8,365,211	12,141,469	17,269,596	2,425,560	1,159,538	503,527
Variable cost (Rs.)	4,861,061	6,520,187	10,800,546	1,683,288	834,479	286,221
Gross profit (Rs.)	3,504,150	5,621,282	6,469,050	742,272	325,059	217,306
Net profit (Rs.)	2,426,979	4,077,096	3,901,434	455,782	202,644	145,785

Multi-day boats (IMUL) ,Out-boat engine Fibre reinforced Plastic boat (OFRP)

Non-mechanised Traditional Boat (NTRB) and mechanised traditional crafts (MTRB)

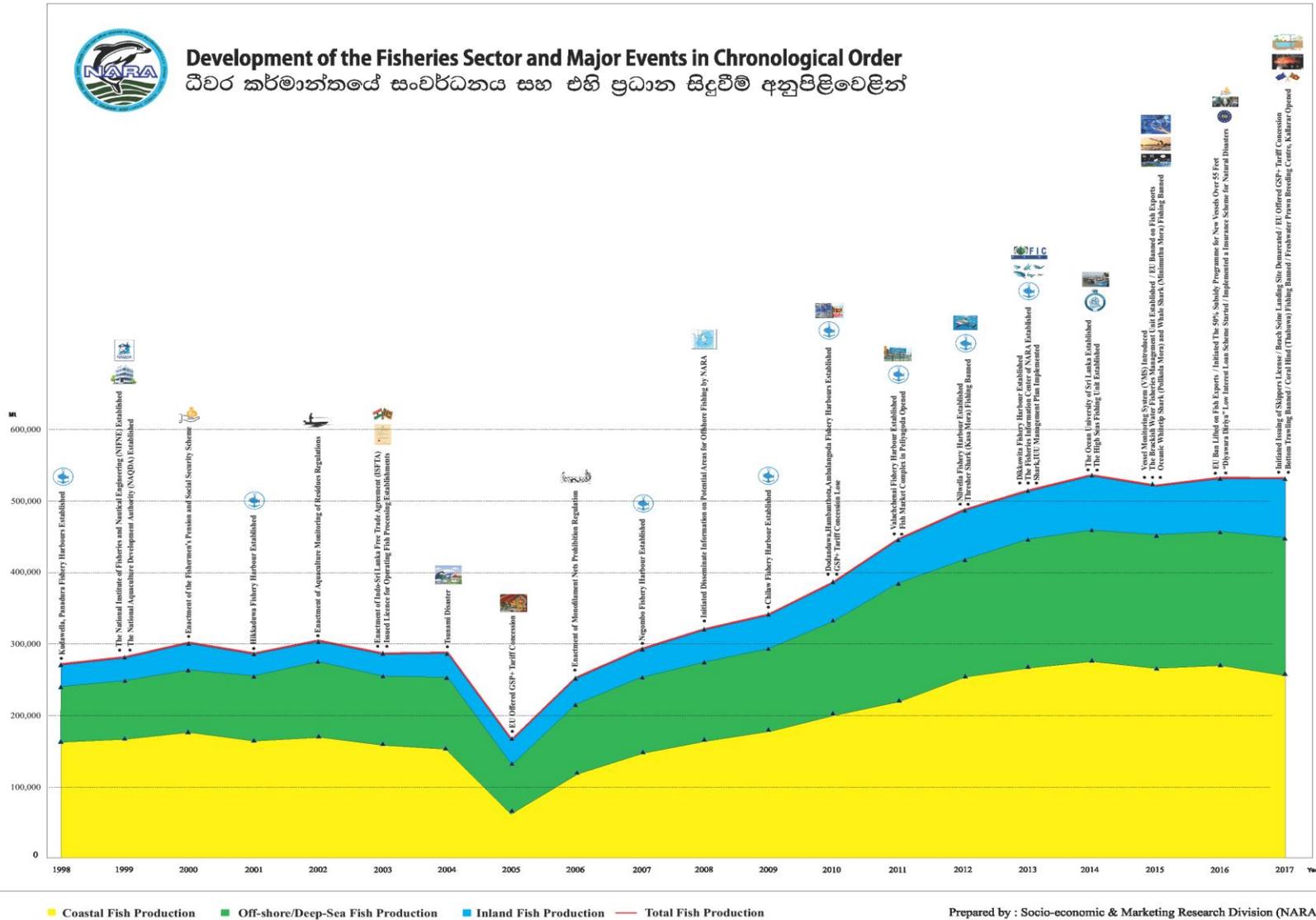
Source: Socio-economic survey/SED/NARA/2018

- Data were collected from 247 skippers/boat owners representing main fishery harbours and anchorages



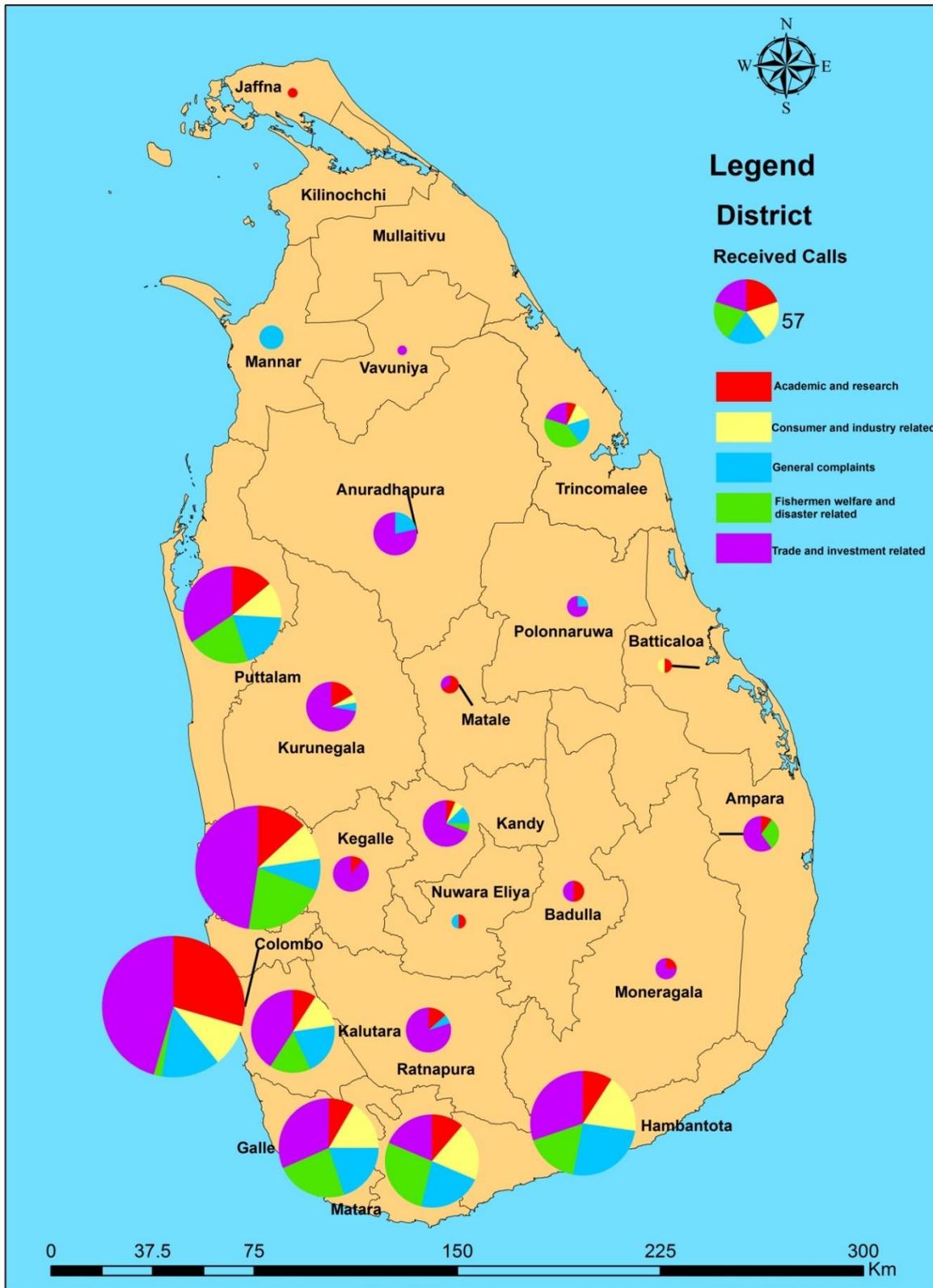
Development of the Fisheries Sector and Major Events in Chronological Order

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Prepared by : Socio-economic & Marketing Research Division (NARA)

Spatial distribution of the received calls to NARA information centre (2013-2018)
 Hotline 0710101010



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Annexure 1: Annual Fish Production by Fishing Sub Sectors (MT)

Indicator	2013	2014	2015	2016	2017	2018
Marine	445,930	459,300	452,890	456,990	449,440	439,370
Coastal	267,980	278,850	269,020	274,160	259,720	249,020
Off-shore/ High sea	177,950	180,450	183,870	182,830	189,720	190,350
Inland and Aquaculture	66,910	75,750	67,300	73,930	81,870	7,690
Capture (perennial water bodies)	55,020	68,820	57,060	58,410	68,500	71,020
Culture (seasonal water bodies)	7,460	1,780	3,150	9,490	8,740	8,490
Coastal aquaculture (Shrimp)	4,430	5,150	7,090	6,030	4,630	8,180
Total	512,840	535,050	520,190	530,920	531,310	527,060

Annexure 2: Marine Fish Production by Fisheries Districts (MT)

Fisheries District	2013	2014	2015	2016	2017	2018
1 Negombo	41,080	38,030	36,260	31,150	29,720	30,370
2 Colombo	4,780	7,110	6,770	6,310	5,935	4,650
3 Kalutara	48,170	40,180	32,350	46,090	42,440	41,750
4 Galle	49,230	51,550	55,240	56,890	47,750	54,100
5 Matara	48,850	42,370	35,190	30,550	28,800	29,710
6 Tangalle	42,540	58,870	66,100	62,510	68,050	64,230
7 Kalmunai	23,070	21,660	18,240	20,180	20,880	18,450
8 Batticaloa	37,130	31,720	27,790	28,500	23,500	17,850
9 Trincomalee	24,370	22,340	24,770	23,780	33,410	34,300
10 Mullaitivu	8,480	8,930	10,080	11,140	5,470	3,110
11 Kilinochchi	14,670	15,780	13,800	14,560	11,840	11,190
12 Jaffna	21,380	25,890	29,290	32,260	44,465	41,070
13 Mannar	11,110	22,130	19,390	17,510	21,380	23,250

14	Puttalam	34,530	38,280	43,790	41,890	35,890	34,660
15	Chilaw	36,540	34,460	33,830	33,670	29,910	30,680
Total		445,930	459,300	452,890	456,990	449,440	439,370

Annexure 3: Marine Sector Fish Catch by Major Commercial Groups (MT)

Commercial Groups		2013	2014	2015	2016	2017	2018
Thora	Seer	25,650	30,000	8,940	7,440	7,790	7,670
Paraw	Carangids	25,160	29,270	34,050	32,620	23,690	22,290
Balaya	Skipjack tuna	73,350	61,750	54,040	47,730	57,960	55,000
	Yellowfin						
Kelawalla	tuna	45,760	45,200	46,430	39,600	38,960	41,690
Other Blood	Other tuna like						
Fish	sp	50,200	59,190	46,930	38,750	44,520	51,900
Thalapath	Other bill fish	**	**	26,040	32,530	33,180	32,680
Mora/Maduwa							
a	Shark/Skate	8,030	7,440	5,860	8,980	13,620	13,500
Rock Fish	Mulletts	35,450	34,890	34,960	33,920	31,100	29,060
Shore S/ V	Small fishes	118,560	108,420	136,790	153,180	143,250	132,160
Issa	Prawns	29,230	23,940	20,090	19,720	17,620	16,970
Pokirissa	Lobsters	1,890	1,480	630	960	540	570
Kakuluwa	Crabs	9,370	6,450	9,670	11,920	11,510	12,830
Others	Other marine	23,280	51,270	28,460	29,640	25,700	23,050
Total		445,930	459,300	452,890	456,990	449,440	439,370

** Include in Other Blood fishes

Annexure 4: Export Value of Fish and Fishery Products (Rs. Million)

Exported Item	2013	2014	2015	2016	2017	2018
Shrimps	2,521	3,375	1,971	2,464	3,213	3,485
Lobsters	1,107	1,148	777	657	782	971
Crabs	2,087	2,617	2,050	2,623	3,336	4,316
Beche de Mer	1,351	521	482	383	494	1,400
Ornamental Fish	1,383	1,636	2,392	1,847	2,288	2,626

Chank& Shells	115	124	109	113	147	123
Shark Fins	128	151	171	133	214	338
Molluscs	1,217	1,139	739	1,038	2,648	3,397
Fish Maws	16	20	6	16	36	68
Food Fish	21,399	23,583	15,528	16,877	24,690	29,759
Others	468	482	491	650	1,382	1,465
Export Value	31,792	34,796	24,716	26,801	39,230	47,948

Annexure 5: Export Quantity of Fish and Fishery Products (MT)

Exported Item	2013	2014	2015	2016	2017	2018
Shrimps	1,625	2,001	1,341	1,667	1,845	1,984
Lobsters	340	301	204	175	224	231
Crabs	1,861	1,872	1,710	2,117	1,819	1,401
Beche de Mer	260	165	169	136	150	248
Ornamental Fish	na	na	na	na	na	na
Chank& Shells	286	343	289	297	355	329
Shark Fins	34	32	39	36	53	86
Molluscs	2,064	2,431	1,371	1,568	3,153	3,672
Fish Maws	3	2	2	1	7	5
Fish	16,919	18,658	11,807	11,101	16,250	18,031
Others	519	515	529	495	971	2,011
Export Quantity	23,911	26,320	17,461	17,593	24,827	27,998

Annexure 6: Value of Imported Fish and Fishery Products (Rs. Million.)

Imported Item	2013	2014	2015	2016	2017	2018
Maldiva Fish	857	647	1,658	1,994	1,624	1,546
Dried Fish	10,401	8,305	9,510	12,453	13,176	13,714
Canned Fish	5,953	5,092	11,919	9,638	9,606	8,616
Food Fish	3,490	4,357	6,764	10,111	8,605	7,323

Others	418	460	878	977	958	1,527
Total	21,119	18,861	30,729	35,173	33,969	32,726

Annexure 7: Imported Quantity of Fish and Fishery Products (MT)

Imported Item	2013	2014	2015	2016	2017	2018
Maldive Fish	1,447	1,256	2,216	2,732	2,674	2,323
Dried Fish	37,609	35,280	33,053	34,978	33,012	32,176
Canned Fish	21,835	19,591	49,016	37,089	40,614	28,068
Food Fish	15,844	21,095	33,867	39,074	27,782	18,694
Others	1,665	1,490	1,894	1,820	1,938	3,202
Total	78,400	78,712	120,046	115,693	106,020	84,463

Annexure 8 : Operating Fishing Boats by District – 2018

District	IMUL	IDAY	OFRP	MTRB	NTRB	NBSB	Total Boats
1 Negombo	874	31	1,665	5	1,406	35	4,016
2 Colombo	59	28	415	1	341	31	875
3 Kalutara	400		396	9	271	41	1,117
4 Galle	676	21	387	188	245	48	1,565
5 Matara	1,105	74	763	289	606	4	2,841

6	Tangalle	493	17	921	121	717	122	2,391
7	Kalmunai	124	87	831	182	811	199	2,234
8	Batticaloa	338	17	1,522	13	5,071	154	7,115
9	Trincomalee	185	8	3,813	24	1,930	187	6,147
10	Mullaitivu	1		1,080		244	44	1,369
11	Kilinochchi	1	1	711	91	216		1,020
12	Jaffna	107	426	4,322	588	2,074	205	7,722
13	Mannar	41	208	3,079	506	717	12	4,563
14	Puttalam	79		2,511	178	1,354	110	4,232
15	Chilaw	98		1,716	11	1,431	128	3,384
Total		4,581	918	24,132	2,206	17,434	1,320	50,591

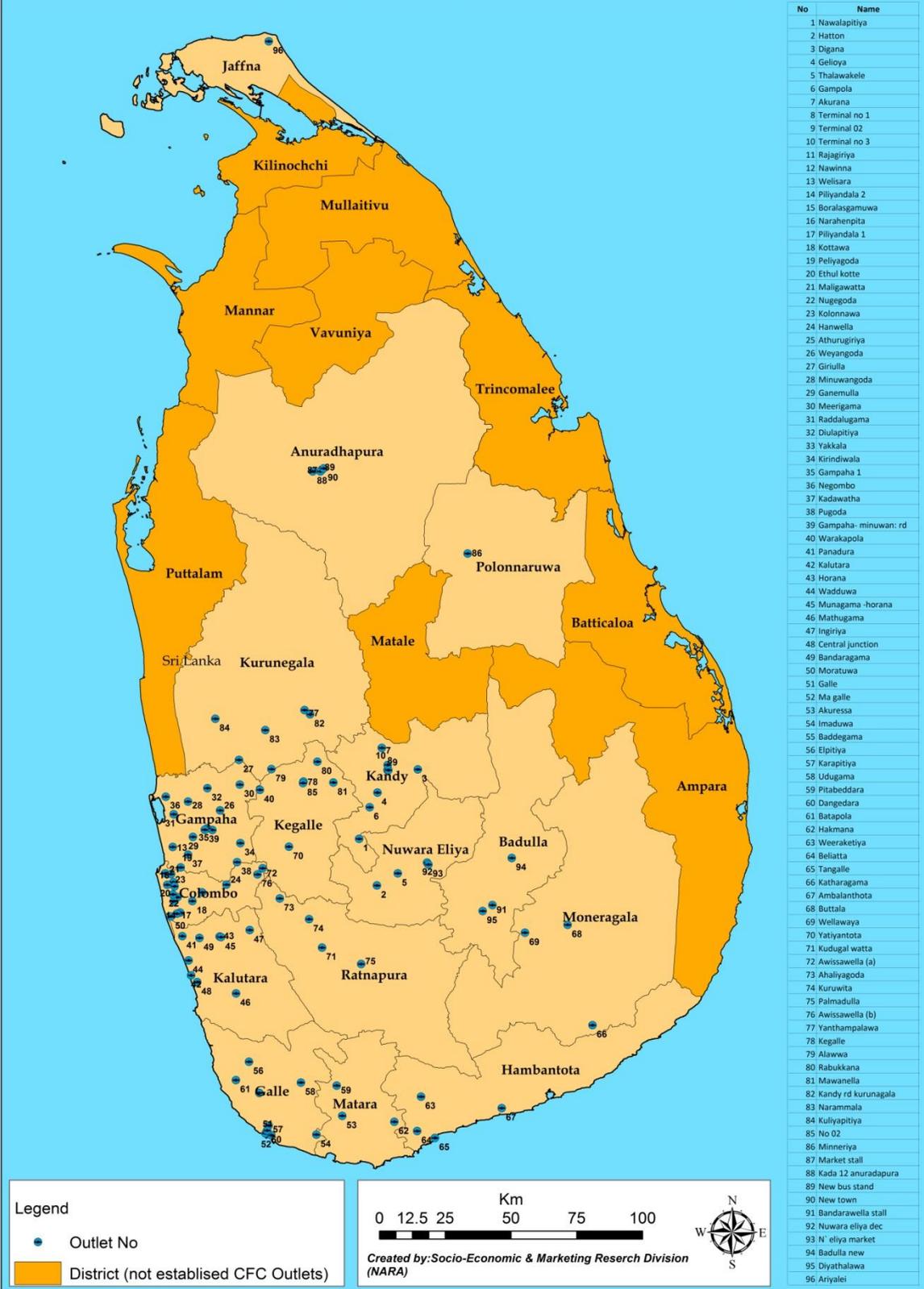
Annexure 9: Active Ice Plants and Production Capacity by Districts – 2018

District	Ice plants	Capacity(MT/day)
Colombo	-	-
Negombo	12	689
Kalutara	6	278
Matale	1	15
Galle	5	120
Matara	11	452
Tangalle	14	480
Jaffna	6	130
Mannar	4	164
Mullaitivu	2	47
Kilinochchi	2	11
Batticaloa	4	113
Kalmunai	3	32
Trincomalee	6	316
Kurunegala	1	1
Puttalam	8	230
Chilaw	5	215

Anuradapura	2	13
Polonnaruwa	1	2
Monaragala	1	2
Total	94	3310

Annexure 10: Ceylon Fisheries Corporation Outlets in Sri Lanka

Ceylon Fisheries Corporation Outlets in Sri Lanka



Annexure 11: Ceylon Fisheries Corporation Purchasing & Sales Region Map

Ceylon Fisheries Corporation Purchasing & Sales Region Map

