



# Sri Lanka

# **Fisheries Industry Outlook**

# **2022**



**Socio-economic & Marketing Research Division**  
National Aquatic Resources Research and Development Agency (NARA)

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# 1. Fish Production

## 1.1 Fish production by sectors

The total fish production in Sri Lanka in 2022 was 397, 230 Mt. which reflects 8.8% or 51, 065 Mt. decreased compare to the previous year of 2021. The reported declined in offshore and coastal fish catches of 22, 245 Mt. and 28, 820 Mt. respectively were major setbacks to decline the total annual fish production of the country. Prevailed bad weather conditions at the sea were major reasons for the declined in catch in both coastal and offshore fisheries of the country. The marine fisheries accounts for nearly 71% to the total fish production and of which coastal landings makes up 53% while the rest (47%) from offshore catches. The inland capture fishery contributes 81% and followed by shrimp (12%) and other aquaculture species (8%) to the total inland fish production of the country. Although the production of other aquaculture species has slightly decreased the production of inland capture fisheries and shrimp have shown an increased.

Table 1.Total fish production by sectors from 2019- 2022 - (Mt)

Year	Off shore	Coastal and Lagoon	Total Marine	Capture	Aquaculture	Shrimp	Total Inland	Total Production
2019	172910	242580	415490	73230	10710	6400	90340	505830
2020	144370	182560	326930	84310	10140	7360	101810	428740
2021	153415	178260	331675	80720	9105	14410	104235	435910
2022	131170	149440	280610	94860	7680	14080	116620	397230

(Source: MFAR, 2022)

The table 01 depicts the trend of marine, inland, and total fish production over the years. The patterns show that the total fish production of the country has been decreasing over the years.

The declined in fish production was greater in the year 2020 (15%) but it was about 09% in 2022 compared to the previous years. The first and second waves of the Covid-19 pandemic have affected to the fisheries sectors which was the major reason for the continuous declined in fish production of the country. In addition to that the X press pearl ship burning incident and its consciences during the second quarter of the year in 2020 has impacted for the fishing activities in 2021 especially in coastal fisheries in the west coast of the country and the fuel shortage prevailed due to the economic crisis have led to decrease in total fish production in 2022 compared to the year 2021. Due to the X press pearl ship burning incident fishing activities were restricted from Kalutara to Negombo in the west coast which was negatively impacted to reduce by about 2% of the coastal fish production in 2021 compared to the previous year. However, the offshore fish production has increased by 6% in 2021 compared to the year 2020 of the country. The production of shrimp through aquaculture farming has shown a substantial increase in the year 2021 compare to the year 2019.

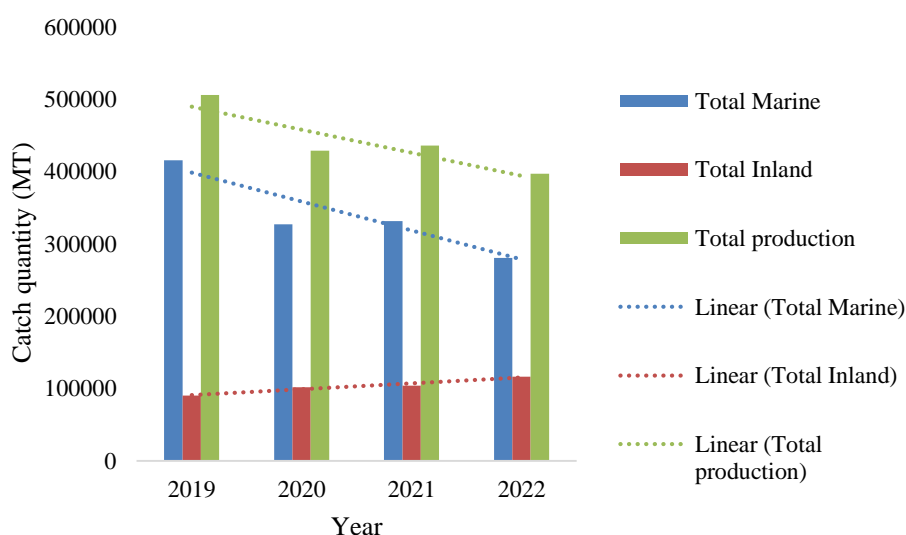


Figure 1. Trend in marine, inland and total fish production from 2019-2022



The figure 2 depicts that a downward trend in both coastal and offshore fish production of the country over the years and of them the coastal fish production has shown a sharp declined. The decline was 25% in coastal fish production while it was 17% in offshore fish production in 2020 compared to the previous year production.

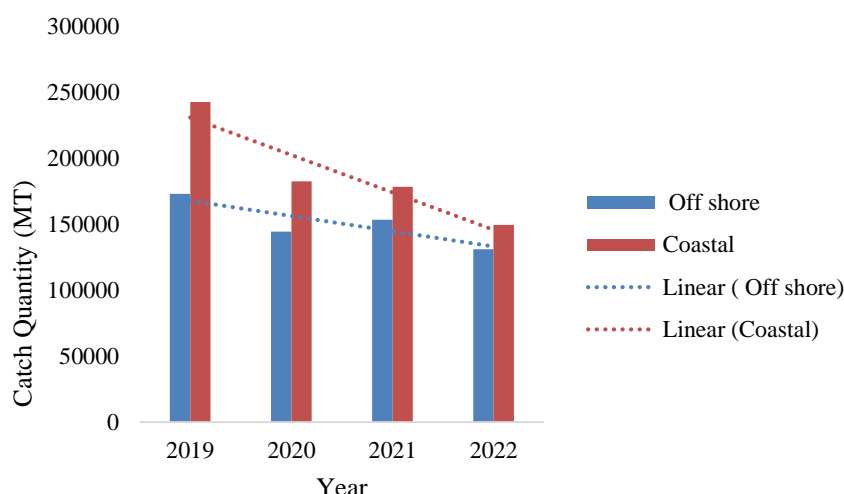


Figure 2. Trend in offshore and coastal fish production during 2019- 2022

## 1.2 Domestic canned and dried fish production

Table 2. Canned and dried fish production from 2019-2021 (Mt)

Year	Canned fish	Dried fish
2019	3131	54880
2020	4029	59760
2021	9251	51340

(Source: MFAR, 2022)

The domestic canned fish production of the country has shown a steady increase over the years (Table 2). The all the time highest volume of canned fish produced was recorded in 2021 accounting a 130% increase over the year 2020 while the year 2019 showed the all the time lowest production of canned fish in the country. The production of dried fish has reached it's all the time peak in 2020 and showed a 9% increase over the previous year. However, dried fish production has shown a sharp dropped in 2021 by 14% due to shortage in raw material supply as a result of drop in total fish production of the country.

## 2. Consumption of Fish & Fishery Products

### 2.1 Monthly Household Fish Consumption

Fish is one of much affordable animal protein sources for the people of the country and it provides various essential nutrients, such as high-quality proteins, omega-3 fatty acids, vitamins (D, B12), and minerals such as calcium, iron, zinc and iodine to maintain a healthy life. The frequency and quantity of fish consumed varies among households on different factors such as geographical location, preferences, socio-economic status, market access and cultural norms. The average monthly household fish consumption in Sri Lanka was 9.0 grams/day/person in year 2019 and showed it has been decreasing over the years. A 72% decreased has reported in 2019 compared to the year 2016.

Table 3. Average Monthly Household Fish Consumption (grams)

Species	2002 /2003	2006/2007	2009/ 2010	2012/2013	2016	2019
Large Pelagic	1282.4	1324	1445	1439.6	1415.1	422
Small Pelagic	1151.5	1132.4	1454.3	1384.5	1402	379.8
Inland Fish	460.8	550.6	553	571	704.9	162.4
Crustaceans	55.7	63.9	133.8	141.3	157.5	36
Total	2950.4	3071	3586.1	3536.4	3679.5	1000.2
Grams/Day/Person	23.4	25	29.9	30.2	32.3	9

(Source: MFAR, 2022)

The marine capture fisheries has contributed 80% to the total household fish consumption of the country in 2020 and of which the large pelagic species have constituted 42% followed by the small pelagic species (38%) and inland fish (16%) but the contribution of crustacean species was minimal and it was about 4%. The household marine pelagic, inland, and crustacean species consumption over the years from 2002 to 2019 and shows a fluctuation trend in quantities.



A significant downfall in quantity of fish consumed (77%) was recorded with crustacean species while the lowest declined (72%) was recorded with marine pelagic fish species in 2019 in comparison to the year 2016. The per capita fish consumption of a household per day has increased until 2016 and since then it has been decreased remarkably by 2019.

Table 4. Per Capita Fish Consumption (kg/year)

<b>Item</b>	<b>2006/2007</b>	<b>2009/2010</b>	<b>2012/2013</b>	<b>2016</b>	<b>2019</b>
Fresh Fish	9.1	10.8	10.9	11.6	3.2
Dried Fish	3.9	3.8	3.6	3.6	1.0
Canned Fish	0.7	0.7	0.6	1.4	0.9

(Source: MFAR, 2022)

The total fish consumption of the people of the country is comprised of fresh fish, dried fish and canned fish in forms. The per capita fish consumption of the country has shown a declining trend over the years and of which fresh fish has declined by 72.4% followed by dried fish 72.2% and canned fish 35.7% in 2019 compared to the year 2016 in the country. The quantity of per capita consumption of fresh, dried and canned fish in 2019 were 3.2, 1.0 and 0.9 kg/year in sequence. The per capita fish consumption is always aligned with total fish and canned fish supplies of the country.

## **2.2 Dried Fish Consumption**

Dried fish are one of the major sources of animal protein for the people of the country especially among economically marginal poor people and people those who are living in the middle parts of the country mainly due to shortages in supplying of fish in fresh form as a result of marketing and distribution difficulties. The main dried fish producing districts of the country are Trincomalee, Mannar, Puttalam, Matara, and Jaffna and contributed around 70% to the total

dried fish production of the country. All the time the local production of dried fish is not sufficient to meet the local demand requirement of the country. Due to surpass of demand over local dried fish production, country has to import dried fish year-round from Thailand, India, Indonesia, Pakistan, Maldives and China to fulfil the local demand gap.

The per capita dried fish consumption per day by a person shows a declining trend over the years. It was 9.8 grams in 2016 but has been decreased to only 2.8 grams in 2019 reflecting a 71% decreased. The dried fish species consumed by a household persons showed the sprats were major and accounted (48%) followed by skip jack tuna (11%), keerameen (8%) and shark species (8%) in 2019. The inland dried fish species had contributed about 2% to the household dried fish consumption. The inland dried fish and smoke fish consumption has been decreasing over the years and it was only 2.9 and 1.7 kg in 2019 respectively but it was 14.7 and 5.6 kg respectively in 2016. The major inland dried and smoke fish species were thilapia and endemic species. Inland dried and smoke fish are popular among consumers in the middle parts of the country where supply of fresh inland fishes is abundance.

Table 5.Average Monthly Household Dried Fish Consumption (Kg)

<b>Species</b>	<b>2006/2007</b>	<b>2009/2010</b>	<b>2012/2013</b>	<b>2016</b>	<b>2019</b>
Sprats	578.6	556.4	502.6	487	128.8
Keerameen	74	69.5	93.6	76.4	24.9
Salaya	52	48.5	48.2	43.7	10.8
Hurulla	32.8	34.4	41.6	22.9	6.1
Seer	9.9	5.7	4.3	4.1	1
Katta	76.4	78.4	75.2	74.8	21.5
Koduwa	1.6	1.9	2.6	1.5	0.7
Anjila	0.7	0.8	1.4	2.5	0.7
Balaya	176.4	140.2	111.9	113.2	34.1
Mora/ Keelan	96.8	93.9	80.1	84.2	24.3
Paraw	6.6	6.6	6.4	5.8	1.8
Anguluwa	61.5	69.5	54.3	41.2	7.8
Prawns	4.8	9	6.7	9.2	2.1
Cuttle Fish	0.9	1.3	0.9	1.3	0.1
FreshWater dried Fishes	20.9	18	17.5	14.7	2.9
FreshWater Smoked Fishes				5.6	1.7
Other Dried fishes	130.6	120.8	99.5	113.6	33.7
<i>Total</i>	1324.4	1255	1165.4	1122.1	308.5
<i>Grams/Day/Person</i>	10.8	10.5	10	9.8	2.8

(Source: MFAR, 2022)

### **3. International Trade of fish & fishery products**

Sri Lanka has a long history in exporting fresh fish in different forms and processed fish products to diversified international markets and destinations and importing mainly dried fish species to fulfill the local market demand from different countries. The trade balance of export and import of fish and fishery products of the country is favorable due to export of high value species while import of low value species. The export has been significantly contributed to the foreign exchange earnings and employments of the country over the years.

#### **3.1 Export and Import quantities/values**

The all the time highest quantity exported of fish and fishery products (28,771 Mt) was recorded in 2019 while the all the time highest imported quantity of fish and fishery products (120,046 Mt) recorded in 2015 of the country. The all the time lowest quantity exported (15,985 Mt) was recorded in 2005 due to prevailed production shortages in northern and eastern parts of the country as a result of escalation in civil war while the all the time lowest quantity imported (56,176 Mt) recorded in 2021 due to the government policy on restriction of imports to mitigate forex difficulties faced by the country.

All the time, in international trade, quantity imported of fish and fishery products to the country was greater than the quantity exported. However, all the time the value of exports or earnings was exceed the value of imports or payments of fish and fishery products of the country. The reason for these discrepancies in value terms was Sri Lanka has imported a vast amount of low-value fish species and fishery products while exported high value fish species and fishery products to the international markets. Sri Lanka mainly exports food fish, shrimp, mollusk and crabs.

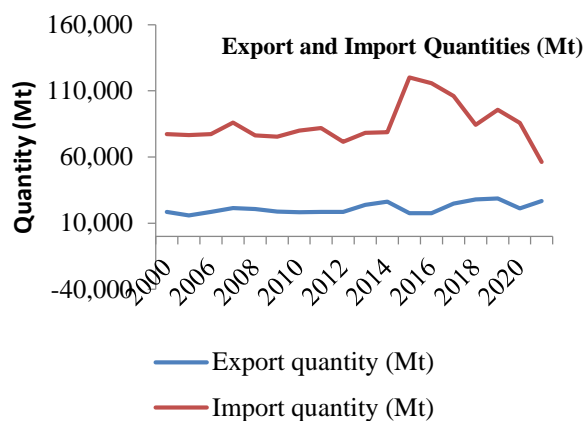


Figure 3. Export and Import Quantities (Mt)  
(Source: MFAR, 2022)

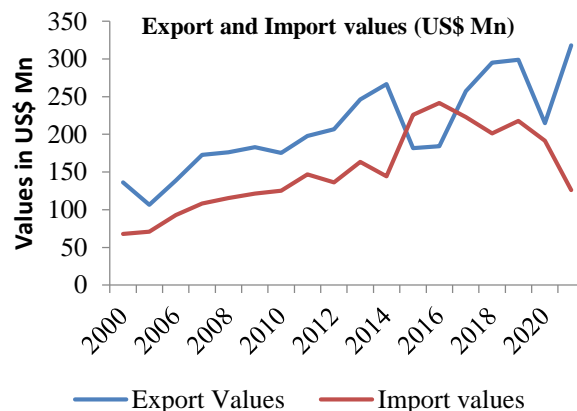


Figure 4. Export and Import Values (US\$)  
(Source: MFAR, 2022)

Over the last few years the quantity of imports of fish and fishery products to the country has been decreasing mainly due to the imposed taxes and levies. The quantity exported of fish and fishery products of the country in between 2015 and 2016 has been decreased mainly due to the ban imposed by the European Union for import of fish and fishery products of Sri Lanka. The ban was released in the last part of year 2016. The contribution of fish and fishery products to the Sri Lanka's total export earnings of a year ranges from 1.5 to 2.5%.

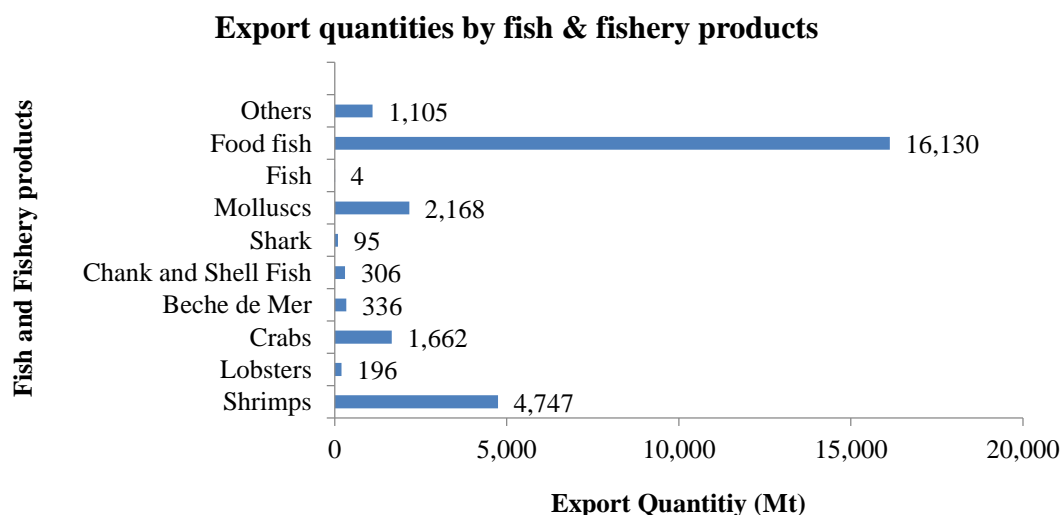


Figure 5. Export quantity by fish & fishery products  
(Source: MFAR, 2022)

The European Union is the major export destination (32%) of fish and fishery products of Sri Lanka. The European Union countries and non-European Union countries has imported 44% of fish and fishery products from Sri Lanka in 2021. The United States of America and Japan were the largest single buyer of fish and fishery products of Sri Lanka and has equally contributed by 8% of quantity exported from the country in 2021. Sri Lanka also exports fish and fishery products to East Asian countries.

**Major export destinations for fish & fishery products**

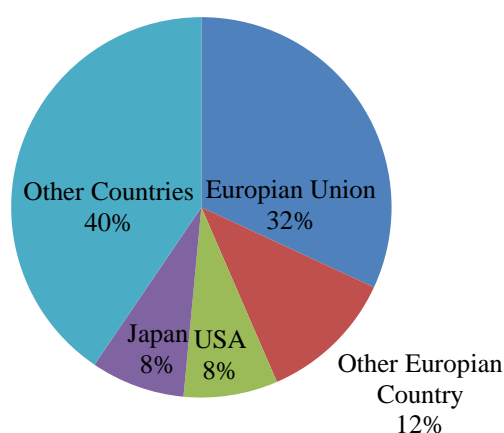


Figure 6.Quantity Imported by country in 2021

(Source: MFAR, 2022)

The domestic fish production accounted for around 88% of total fish consumed while the remaining 12% was imported to the country in 2021. The import value of marine fish and fishery products has climbed from US\$ 67 million to about US\$ 241 million between years 2000 to 2016. However, the value of imports has been dropped since 2016 and it has reached to US\$ 126 million in 2021. In 2021, the dried fish, Maldives fish, or smoked fish accounted for 62% of imports while prepared or preserved fish products (particularly mackerel) and canned fish accounted for 18 and 16% respectively.

**Composition of Fish and fishery product import**

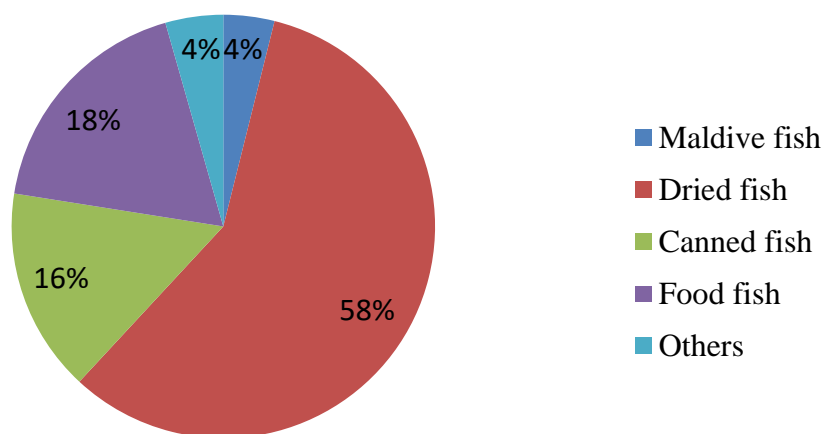


Figure 7. Fish and fishery product imports in 2021

(Source: MFAR, 2022)



## 4. Social welfare & Security

### 4.1. Social indicators related to the fishing population

Fisheries sector has been provided 2.7 million livelihoods for the people of the country in 2021. The industry has been provided a total of 586,000 direct and indirect employment opportunities in both marine and freshwater sectors and of them 224,190 active marine fishers while 91,020 active freshwater fishers. There were a slightly over 185,000 marine fishing households while that of about 81,000 in inland fishing sector. The household population in marine fishing sector was about 804,000 while that of for inland sector was about 318,000 in 2021.

Table 6. Social indicators related to fishing population

Social indicator	Sri Lanka		
	2020	2021	2022
Marine Fishing Households	185,390	185,570	185,810
Inland Fishing Households	64,290	81,070	81,410
Marine Fishers (Men & women)	224,610	225,020	224,190
Inland Fishers (Men & women)	70,715	90,650	91,020
Marine Fishing Household Population	804,760	804,980	803,820
Inland fishing Household Population	247,570	318,730	320,060
Direct and Indirect Employments (Marine & Inland)	585,000	586,000	586,000
Fishing and related livelihoods	2700000 (2.7 million)	2700000 (2.7 million)	2700000 (2.7 million)

(Source: MFAR, 2022)

## 4.2. Welfare and social security benefits

The Ministry of Fisheries has implemented a number of programs to increase the status of social welfare and security of fishers of the country. Providing of houses under the diyawara gammana with all infrastructure facilities, skills development programs, facilities for community social gathering, facilities for clean drinking water and sanitary equipment and facilities to empower children, women and youth were some of them. The “Wewak Samaga Gamak” and “Diyawara Piyasa” programs has been launched focusing on improvement of living standards of fishing communities in the country.

Table 7. Welfare and social security activities in 2020

Social development activity	Location/place	Number of beneficiaries/ buildings
• Construction of houses (renovation)- Sea water section	Ampara, Kalutara, Kilinochchi, Matara, Manner, Hambantota, Galle	57
• Construction of houses (renovation)- Fresh water section	Hambanthota, Trincomalee, Ampara, Batticalo, Mulathive, Monaragala, Kandy, Nuwaraeliya, Matale, Rathnapuraya, Anuradhapura, Polonnaruwa, Kurunegala, Puttalam, Manner	156
• Provision of sanitary facilities- Sea water section	Puttalam, Matara, Batticaloa	28
• Provision of sanitary facilities- Fresh water section	Ampara, Trincomalee, Badulla, Nuwaraeliya, Rathnapura, Anuradhapura, Monaragala, Matale, Puttalam, Hambanthota	63
• Road development	Hambanthota, Batticaloa, Trincomalee, Puttalam, Mulathive, Nuwaraeliya	23 roads
• Provision of water facilities	Puttalam	5
• Common wells	Batticaloa	1

• Drinking water projects	Kurunegala	1
• Construction of community halls/ society halls	Matale, Batticaloa, Polonnaruwa	3
• Providing water filters	Polonnaruwa	2
• Construction of culverts	Puttalam	1
• Renovation of tanks	Hambanthota	3
• Renovation of sea cucumber breeding centre	Mannar	1
• Renovation of ornamental sea water fish breeding centre	Bangadeniya	1
• Renovation of ornamental fresh water shrimp breeding centre	Pambala	1
• Fresh water fish farming programme in domestic farming		3
• Ornamental fish farming/ small- scale ornamental fish farming/ improving ornamental fish farming		12
• Women development programme/ Establish	Puttalam	
• Sea cucumber export village development activities	Jaffna, Kilinochchi	

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(Source: MFAR, 2022)

### 4.2.3. Safety of fishers

The government of Sri Lanka has initiated a number of programs to ensure the safety of fishers at sea. A total number of 29,575 fishers and 17,544 fishing boats were insured while 11,895 sea worthiness certificates has been issued by 2022. A pension scheme for the fishers has been launched and 215 fishers has been registered as beneficiaries by 2022.

Table 8. Regularizing the fisheries sector in Sri Lanka

<b>Function</b>	<b>Progress up to 31.02.2022</b>
Total number of fishing boats insured	17544
Total number of fishers insured	29575
Number of fishers contributed to the fishermen's pension scheme	215
Issue of sea worthiness certificates	11895

(Source: MFAR, 2022)

The government of Sri Lanka has supported to boat owners to rescue fishing boats that met with accidents at sea or arrests due to poaching other nation's territories and repatriate fishers. Most of arrests have been recorded from India, Maldives and Seashells.

Table 9. Fishermen and fishing boats arrested in foreign countries and rescue of them

<b>Country</b>	<b>No of fishers taken into custody</b>	<b>No of fishing boats taken into custody</b>	<b>No of fishers rescued</b>	<b>No of fishing boats rescued</b>
India	20	05	17	3
Maldives	25	04	19	2
Seashells	06	01	05	-

(Source: MFAR, 2022)

## 5. Domestic Fish Prices

The domestic fish prices are frequently subjected to fluctuate at the respective markets. In recent years the prices of fish has shown a continuously increasing trend mainly due to the surpassed demands over the supply quantity and increased in operational cost of fishing operations and distribution. The small varieties such as salaya and hurulla were low in price while seer, sailfish, travelly and yellow fin tuna were high in value among marine fish varieties while thilapia species were high in value among fresh water fish species at the markets. The highest wholesale and retail prices were recorded for seer and the difference of the retail and wholesale price (margin) at the market was 916 rupees per kilogram in 2021. The sail fish and prawns had fetched a reasonable higher prices at the markets and the difference of the retail and wholesale prices were 511 and 691 rupees per kilogram respectively in 2021.

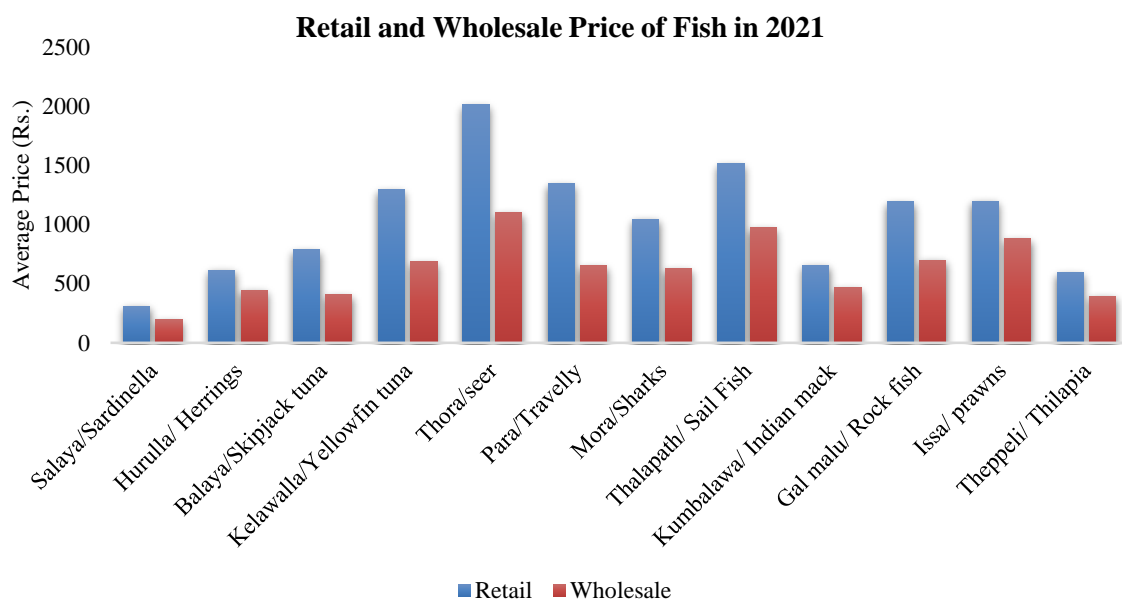


Figure 8. Average Retail and Wholesale Price of Fish in 2021

(Source: MFAR, 2022)

The average wholesale and retail prices of locally produced dried fish varieties was higher than imported dried fish varieties at the local markets. The highest unit wholesale and retail price of 1kg of fish was recorded for dried seer irrespective of locally produced or imported and the difference in retail and wholesale price (margin) for locally produced and imported dried seer was 605 and 758 rupees respectively in 2018.

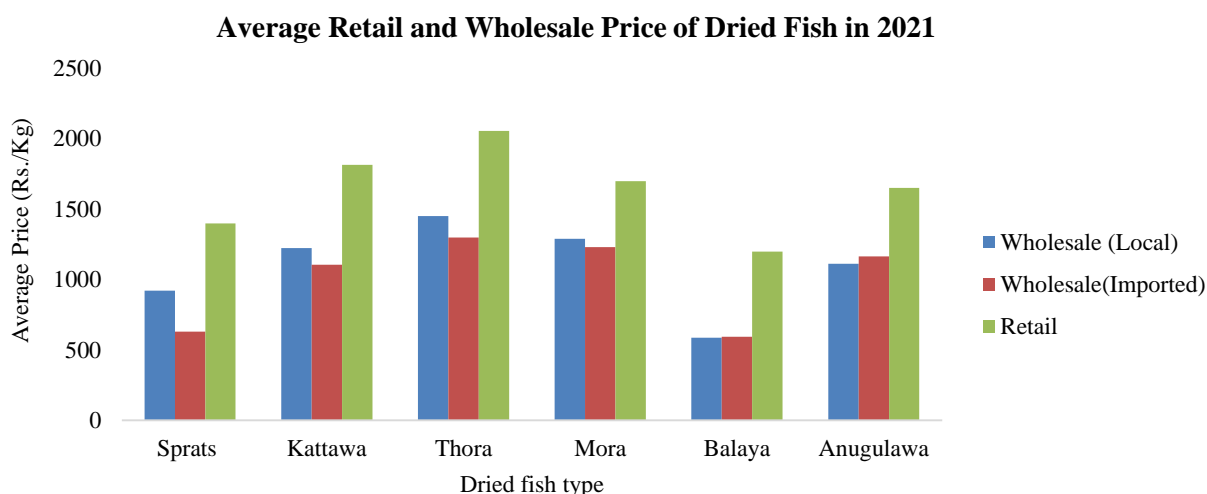


Figure 9. Average Retail and Wholesale Price of Dried Fish in 2018

(Source: MFAR, 2022)

## 6. World Fisheries & Highlights

### 6.1 World Fisheries

The most recent estimates in world fisheries and aquaculture are predicted the production to be increased by 1.2 percent in 2022 (+2.6 percent for aquaculture and -0.2 percent for capture fisheries) to reach 184.1 million tons (FAO, 2021). Despite that continuing in supply constraints and high inflation could cause prices to rise while a slowing global economy could increase price sensitivity. The production of aquaculture is forecasted to grow by 2.6 percent, remaining marginally behind its long-term growth rate (3.7 percent between 2015–2020), as producers fight with high input costs and market uncertainties such as high freight rates and reduced consumer purchasing power. High fuel prices and adverse weather in certain key fishing grounds have all contributed to a 0.2 percent decline in capture fisheries in 2022 and will remain essentially flat in 2023.

Table 10. World fish production by sub sectors in million Mt

Year	Inland capture	Marine capture	Total capture	Inland aquaculture	Marine aquaculture	Total aquaculture	Total world fish catch
2019	12.1	80.1	92.2	53.3	31.9	85.2	177.4
2020	11.5	78.8	90.3	54.4	33.1	87.5	177.8

(Source: FAO, 2022)

The FAO fish price index (FPI) stood at 119 points in September 2022, down 16 points from June 2022, when overall fish prices reached historic high due to revived demand following the pandemic slump. However, fish prices in September 2022 remained high compared with in September 2021 demonstrating a 20-point rise in the FPI. The prices of aquaculture products



have since fallen back to previous levels mainly due to the reduction of feed costs. The crisis in global economic growth have reduced consumer purchasing power and is expected to raise price sensitivity in 2023 as well. However, higher prices of fish will lead to a substantial increase in the value of fish trade. In overall, the value of global fish trade is projected to increase from \$174.8 billion in 2021 to \$193.5 billion in 2022 which would represent a surge of 10.7 percent. In particular, China (mainland), Chile, Ecuador and Norway will account for most of this value increase.

Table 11. World fisheries

	2020	2021 estimate	2022 forecast	change : 2022 over 2021
	Million tons (live weight)			%
Production	177.8	182	184.1	1.2
<i>Capture Fisheries</i>	90.3	92.3	92.1	-0.2
<i>Aquaculture</i>	87.5	89.7	92	2.6
Trade value (exports USD billion)	150.9	174.8	193.5	10.7
Trade Volume (live weight)	64.3	68.3	68.9	0.8
Total Utilization	177.8	182	184.1	1.2
<i>Food</i>	157.4	161.1	163.7	1.6
<i>Feed</i>	16.4	16.9	16.4	-2.8
<i>Other uses</i>	4	4	4	1.1
Supply and demand indicators				
Per caput food consumption				
<i>Food Fish (kg/yr)</i>	20.1	20.4	20.5	0.8
<i>From Capture Fisheries (kg/yr)</i>	8.9	9	9	-0.5
<i>From Aquaculture (kg/yr)</i>	11.2	11.3	11.5	1.8
FAO Fish Price Index (2014-2016=100)	2020	2021	2022 Jan-Sep	% Change Sep 2022 Over Sep 2021
	94.9	101.7	124	22.8

Source: Status of Fisheries & Aquaculture - FAO, 2022

## 6.2 Global Fish Consumption

The world apparent food fish consumption is expected to increase over the next decade, reaching 21.2 kg in 2032 in per capita terms, up from an average of 20.4 kg in 2020-22 (FAO, 2022). In per capita terms, fish consumption will increase in all continents except Africa, where it is projected to decline from 9.8 kg in 2020-22 to 9.6 kg in 2032 with a larger decrease in Sub-Saharan Africa (down from 8.8 kg in 2020-22 to 8.3 kg in 2032) (FAO, 2022). The decline in the African per capita fish consumption will be relatively smaller than in the prior decade while the rise in the Asian per capita fish consumption will be about half that of compared to previous decade. The slowdown in growth is mainly due to sluggish production expansion, higher fish prices and a softening of demand in some Asian countries. Asia will account for 74% of the additional fish consumed at the end of 2032. China on its own will account for 34% of that additional volume. Aquaculture will provide a growing share of the total fish available for human consumption to 61% by 2032.

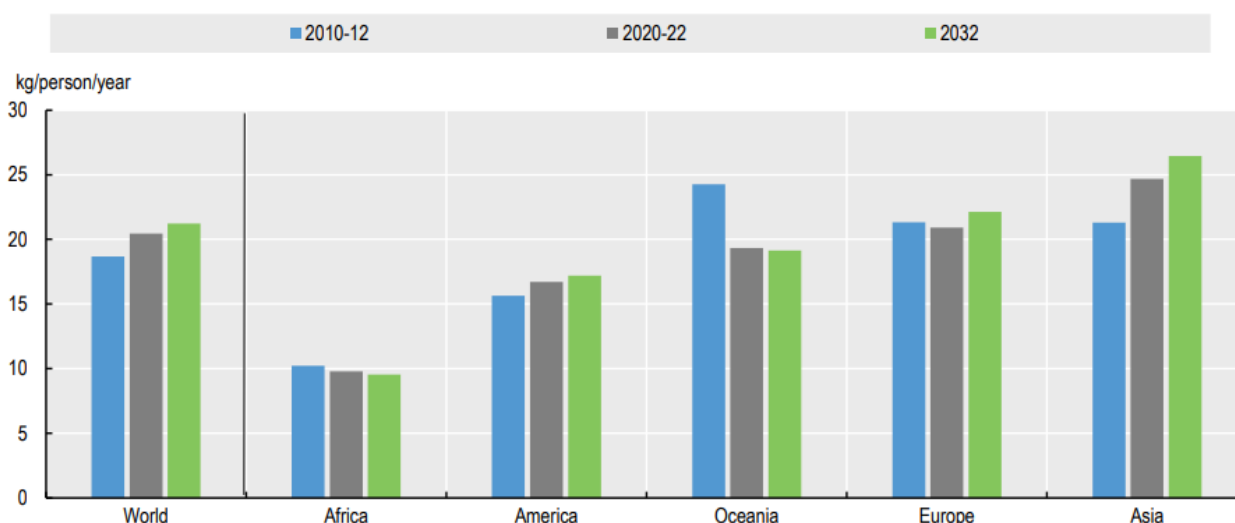


Figure 10. Per capita fish consumption

Source: OECD/FAO (2023), "OECD-FAO Agricultural Outlook" OECD Agriculture statistics (database)

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