

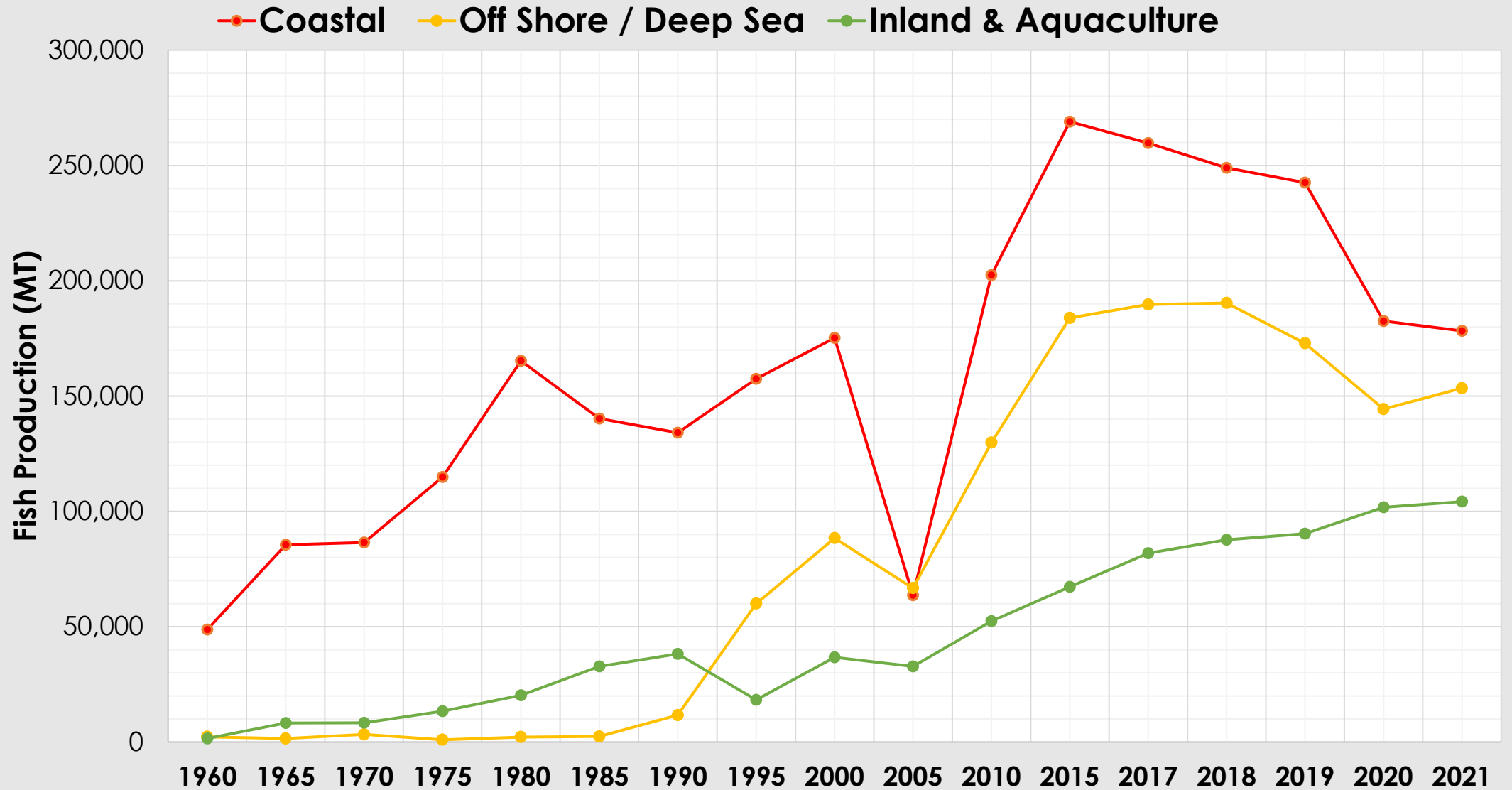
FAO Regional Workshop on Opportunities and Challenges in Economic and Post-harvest Issues Related to Market Access for Fisheries and Aquaculture Products

Bali, Indonesia
1 - 3 October 2024

Country Presentation: SRI LANKA



Fish Production in Sri Lanka (MT)



Source: Fisheries Statistics (2022), Ministry of Fisheries, Sri Lanka

Marine Fish Production by District and Major Commercial Groups - 2022 (Mt)

Fisheries District	Thora (Seer)	Paraw (Trevally)	Balaya (Skipjack tuna)	Kelawalla (Yellowfin tuna)	Tuna like fishes (other blood fishes)	Thalapath (Billfish)	Mora/Maduwa (Sharks/Skates)	Gal Ma'lu (Rock fish)	Shore Seine (Small fish)	Issa (Shrimps)	Pokirissa (Lobster)	Kakuluwa (Crabs)	Other fish	Total
Negombo	340	390	2,320	10,310	570	1,140	660	690	3,020	570	5	30	575	20,620
Colombo	40	130	10	15	120	5	10	120	780	40	5	10	115	1,400
Kalutara	130	230	14,180	2,680	6,320	2,810	290	180	10,990	5	10	-	25	37,850
Galle	280	550	7,980	5,280	5,710	220	170	760	23,100	20	15	5	1,670	45,760
Matara	140	150	9,300	4,540	5,100	1,255	140	190	3,240	-	5	-	260	24,320
Tangalla	180	210	8,980	330	4,330	100	60	900	16,990	5	45	5	1,180	33,315
Kalmunai	150	210	830	500	590	180	200	470	3,605	30	30	150	400	7,345
Batticaloa	380	640	780	1,100	1,750	1,000	320	880	2,235	340	15	70	1,020	10,530
Trincomalee	400	830	880	2,290	1,610	550	160	1,580	5,960	810	5	550	715	16,340
Mullaithivu	360	460	10	10	500	70	160	350	3,680	330	-	90	370	6,390
Kilinochchi	5	110	-	-	10	-	145	400	1,510	460	-	510	710	3,860
Jaffna	480	2,170	20	100	310	120	820	2,320	4,470	2,310	5	1,690	2,900	17,715
Mannar	270	2,120	20	10	30	20	1,880	1,390	8,220	600	5	1,410	3,430	19,405
Puttalam	510	1,280	530	1,370	2,280	480	1,000	1,050	7,380	1,550	10	2,300	3,225	22,965
Chilaw	10	330	280	1,355	280	170	90	1,190	8,405	210	5	70	400	12,795
Total	3,675	9,810	46,120	29,890	29,510	8,120	6,105	12,470	103,585	7,280	160	6,890	16,995	280,610

Source: Fisheries Statistics (2022), Ministry of Fisheries, Sri Lanka

Number of fishers, fishing households and fisheries dependent population

Description	Marine sector	Inland sector	Total
No. of fishing villages	1,269	1,289	2,558
No. of fishers (men and women)	220,870	60,595	281,465
No. of fishing households	183,650	54,170	237,840
Fishing household population	802,340	216,270	
Direct and Indirect employment (marine and inland)			582,000
Fisheries dependent livelihoods			2,700,000



Source: Fisheries Statistics (2022), Ministry of Fisheries, Sri Lanka

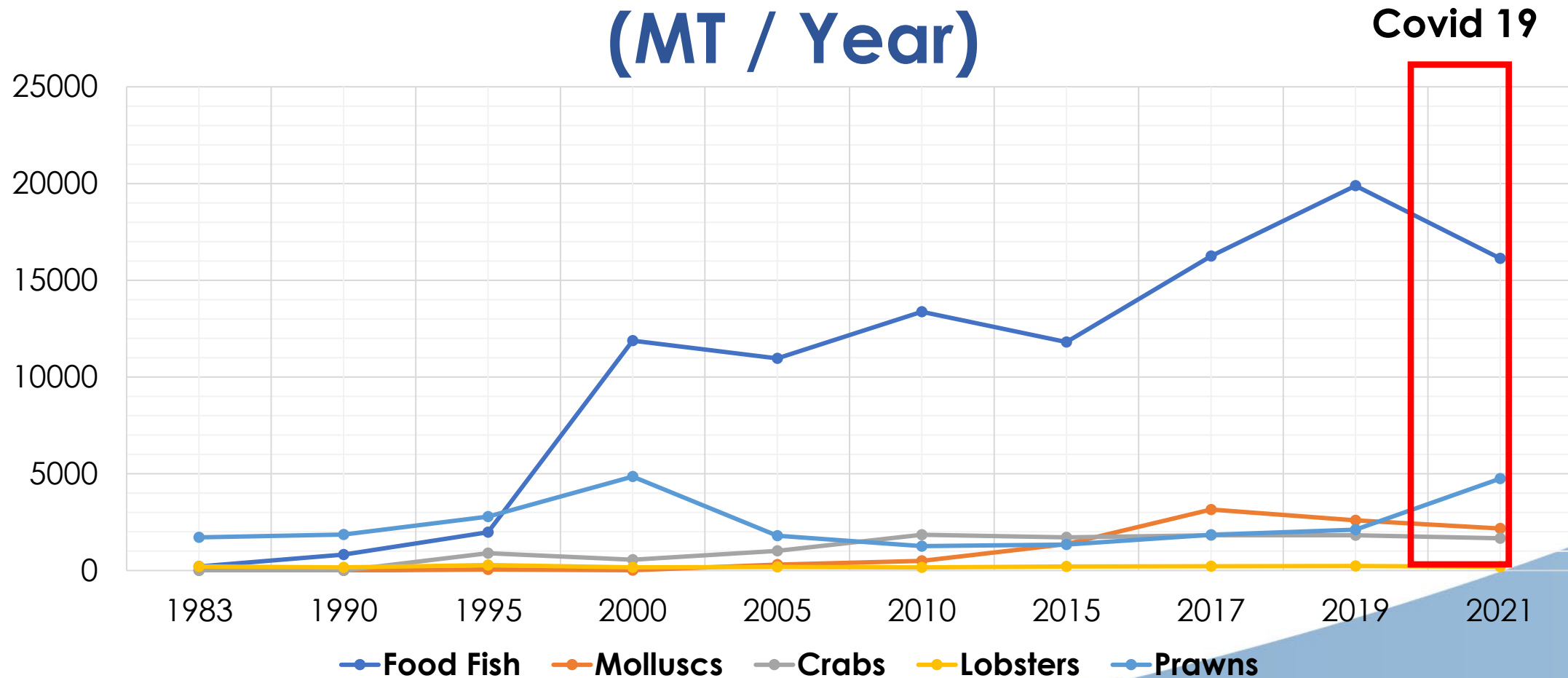
Role of women

- Women often play an important role which has largely been **ignored** (marketing, fish drying, meeting social obligations)
- They earn **supplementary incomes**, which smoothen inter-temporal fluctuations of daily fishing incomes.



Yet often their **rights are violated**: equal opportunities, to decent work, same remuneration for same work, motherhood and child care, etc.

Major Fish Exports in Sri Lanka (MT / Year)



Annual Export Volume- 2021: 26,749 MT

Tuna Exports- 2021: 9,936 MT (37% of all fish & fish products exports)

Export Quantity of Fish and Fish Products (Mt)

Value

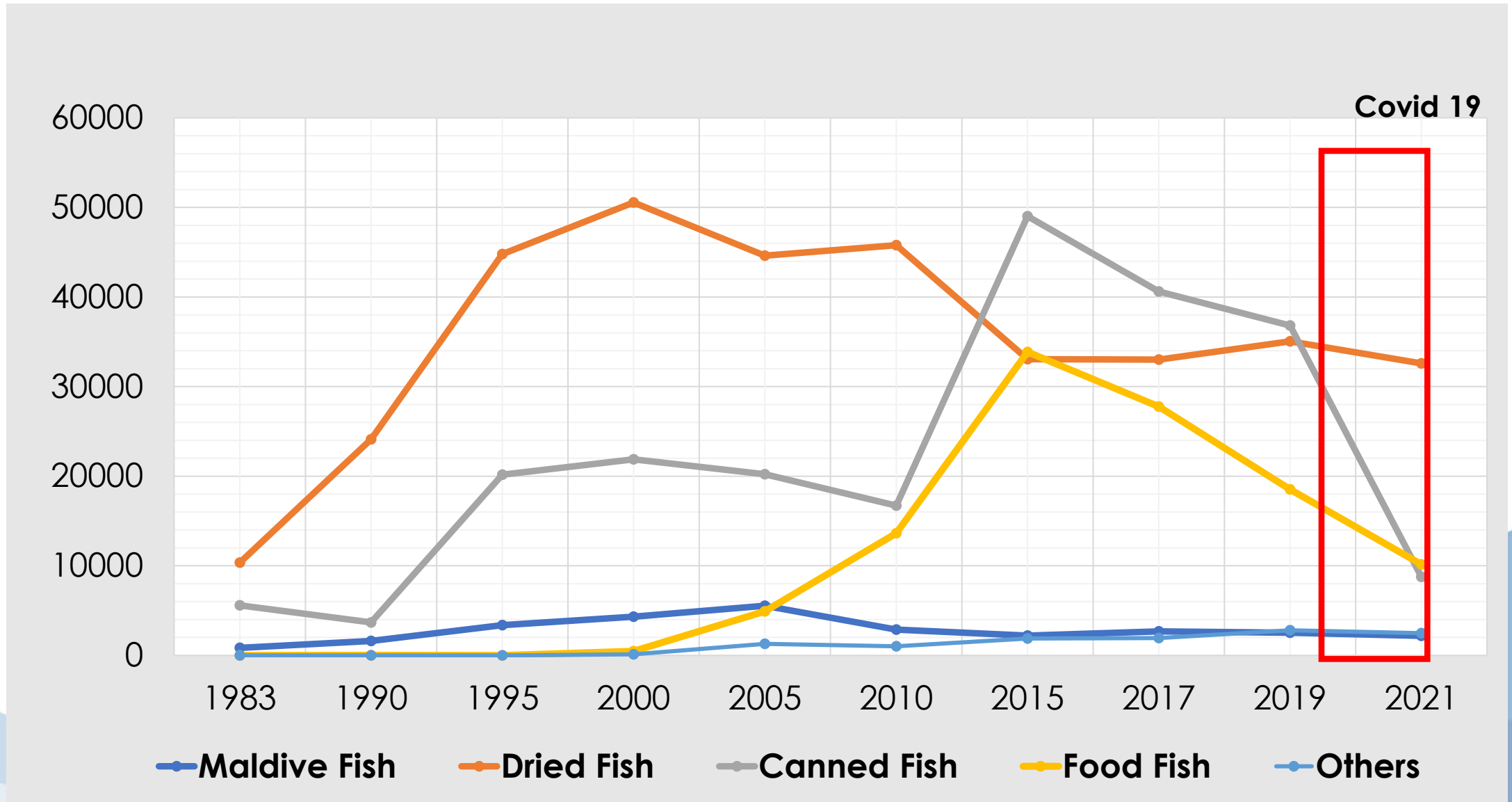
Exported Item	1990	1995	2000	2005	2010	2015	2019	2021
Prawns	1,855	2,781	4,855	1800	1,262	1,341	2,115	4,747
Lobsters	165	283	164	183	166	204	229	196
Crabs	na	898	555	1012	1848	1,710	1,818	1,662
Beche de Mer	36	248	87	258	178	169	503	336
Ornamental Fish (Rs. M)	na	na	593	756	919.5	2,392	2,913	4,193
Chank & Shells	na	746	698	546	617	289	275	306
Shark Fins	na	127	119	74	69	39	91	95
Molluscs	1	51	15	300	496	1,371	2,590	2,168
Fish Maws	na	1	1	1	1	2	4	4
Fish	821	1,978	11,873	10,960	13,372	11,807	19,885	16,130
Others	-	12	188	851	316	529	1,261	1,105
Export Quantity	2,879	7,126	18,554	15,985	18,325	17,461	28,771	26,749

Source: Fisheries Statistics (2022), Ministry of Fisheries, Sri Lanka

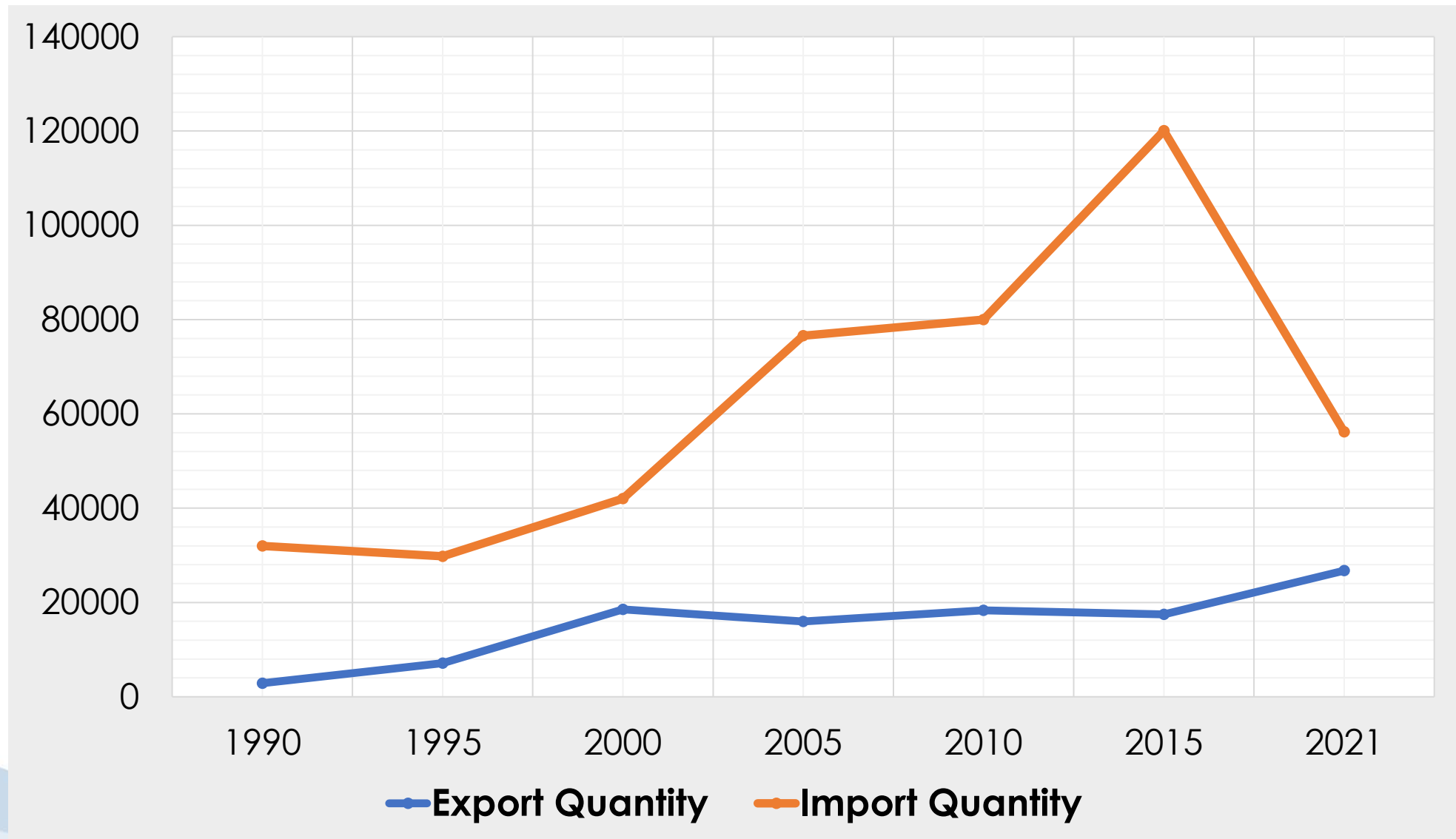
Export Markets:

1. **Yellow fin tuna**: United States, France, Israel, Netherlands and Canada
2. **Big eye tuna**: France, Viet Nam, China, Thailand, Italy and the United States
3. **Giant Tiger Prawn / Vannemi shrimp**: Ukraine, Japan, United States, Switzerland, UK, Taiwan
4. **Molluscs: Oysters, Mussels, Cuttlefish, Squid**: Japan, USA, Hong Kong and the Maldives
5. **Ornamental Fish**: USA, Japan, the United Kingdom, Germany and France. Emerging markets - Qatar and Canada,
6. **Crabs**: USA, UK, Singapore, China, Hongkong, Thailand
7. **Lobsters**: Hong Kong, China, Japan, Taiwan, Maldives and Singapore
8. **Beche De Mer / Sea Cucumber**: Singapore, Taiwan, Hongkong

Fish and Fish Products imported to Sri Lanka (MT)

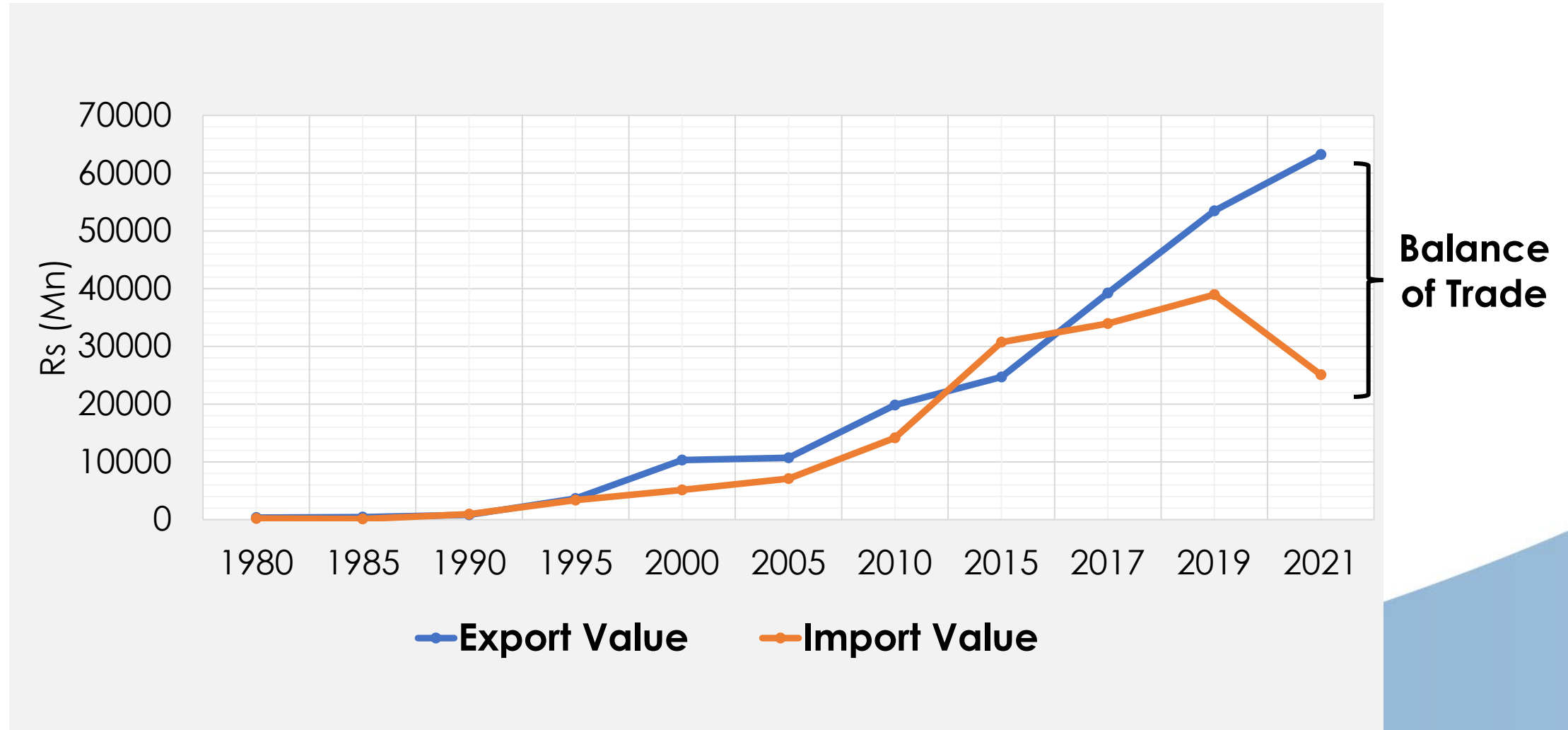


Quantity of Fish Exports and Imports (MT / Year)



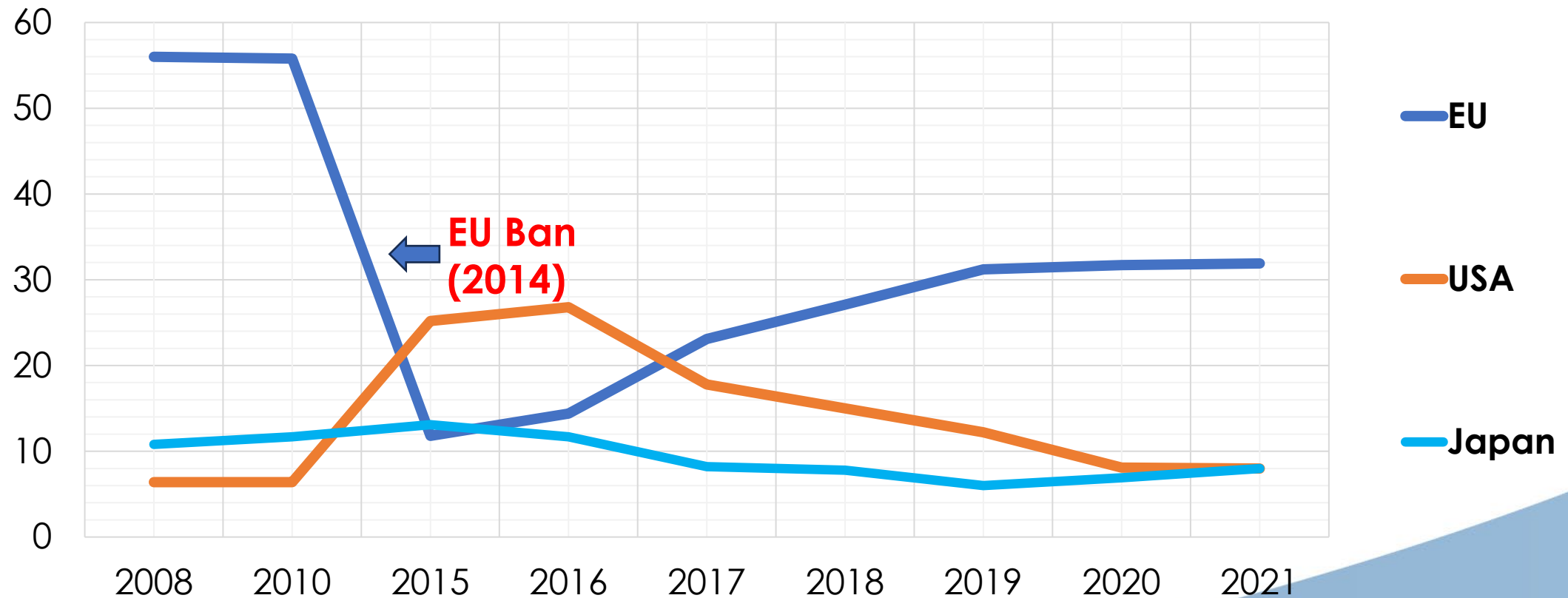
Source: Fisheries Statistics (2022), Ministry of Fisheries, Sri Lanka

Export and Import Value of Fish and Fishery Products



Exporting fish and fish products of High Value (2021- 63,222)
Importing fish and fish products of relatively lower value (2021- 25,080)

Market Share of Importing Countries (percentage of total exports)



In October 2012 – EU issued a Yellow Card to Sri Lanka (for IUU fishing)
In October 2014- EU imposed a complete ban
The ban was lifted in 2016

Challenges / Bottlenecks related to production, distribution, marketing and trade

- **Declining catches from capture fisheries** and slow expansion of Aquaculture
- **Overexploitation and Depletion of Resources**
 - Results of stock assessment studies
- **Environmental Pollution**
 - Especially in coastal waters
- **Water Availability issues**
 - Fluctuating and Unpredictable Water Availability for inland fisheries
- **Religious and Social Constraints** to expand aquaculture production
- **Sustainability issues in aquaculture**
 - High Environmental Damage / lack of Sustainability Reporting
- **Lack of capital** to invest in hatchery development and other infrastructure

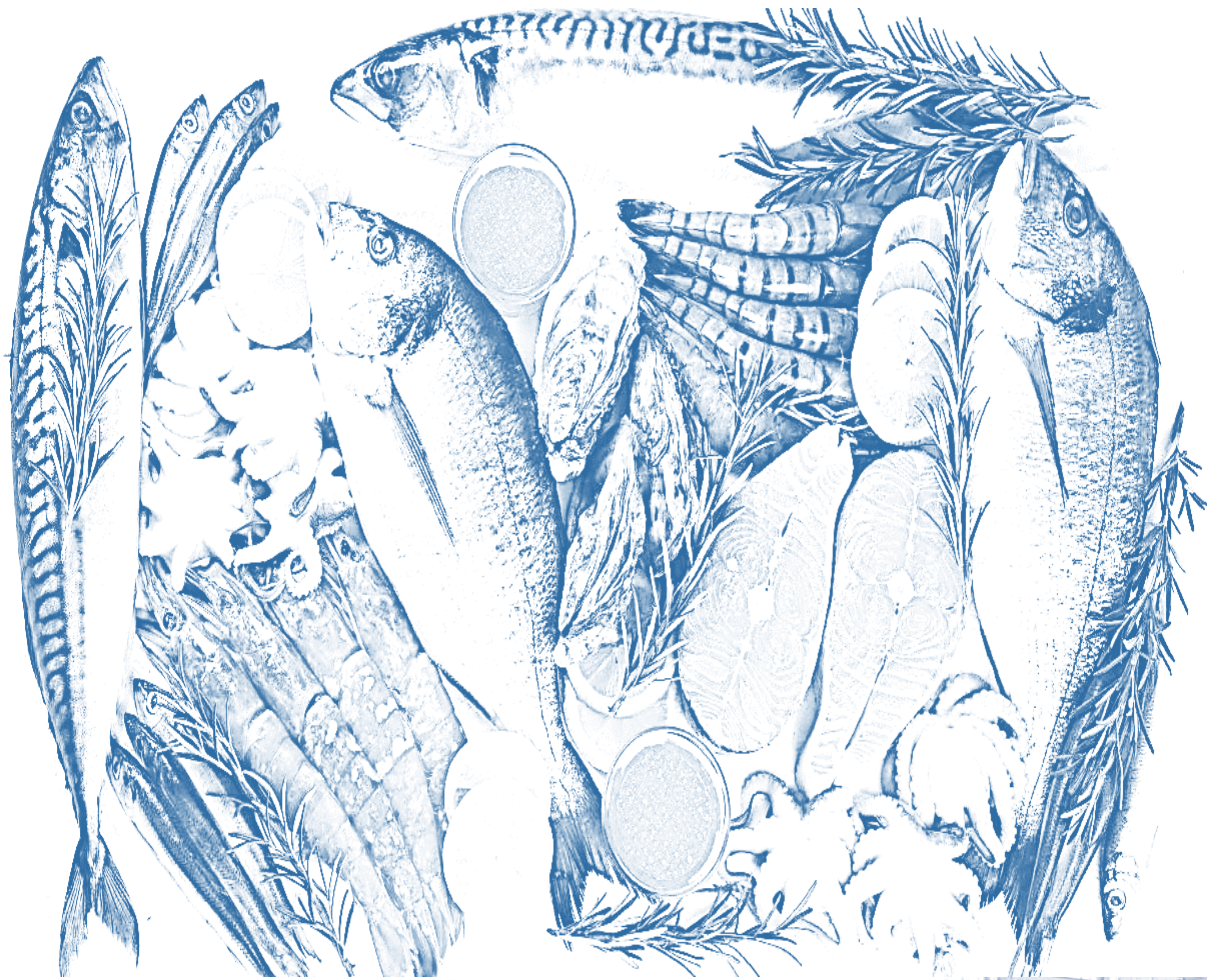
Challenges continued.....

- **Post – Harvest Issues**

- 40-60% Quality Loss
- Poor fish Preservation Facilities
 - Inadequate ice supply
 - Inadequate wholesale markets with fish preservation facilities
- Poor On-Board handling of fish
 - NARA has developed a new cooling system for multiday crafts
- Poor Landing site facilities
 - Lack of proper landing floors / water
- Poor Distribution
 - Ceylon Fisheries Corporation – inadequate facilities
- Poor Sanitary and phytosanitary Standards
- Weak Monitoring of Health and Sanitary standards

Challenges continued.....

- **Limitations imposed by IOTC**
- **Lack of awareness about export potential**
- **Needs-Research Gap** and **weak knowledge translation** process
 - Actual needs of the people and the export trade are not properly communicated to research. Poor Knowledge translation process
- **Failure to ratify ILO 188 convention** (work in fishing convention)
 - Non-ratification might soon lead to ban on exports by EU & other countries
- **Curb IUU Fishing** (improve VMS & MCS process)
- **WTO (AFS)-**
 - Resolving dichotomy between 'environmental concerns' and 'human rights' concerns
- **Blue injustices**
 - Land grabbing, displacement and dispossession by Tourism stakeholders and climate change



End

