

2023



INDUSTRY

DATA

BOOK

AUTOMOBILE SECTOR



MINISTRY OF INDUSTRIES

AUTOMOBILE SECTOR

MINISTRY OF INDUSTRIES

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Foreword

The 2023 Industrial Data Book represents our commitment to supporting industrialists as they face current economic challenges and strive for sustainable development through improved decision-making. This data book primarily concentrates on the statistical factors that impact economic growth, particularly focusing on export expansion.

The statistical analyses presented in this data book are based on comprehensive statistical data sourced from various institutions, including the Department of Census and Statistics (DCS), the Department of Customs (DoC), the Export Development Board (EDB) and the Central Bank of Sri Lanka (CBSL).

Within this publication, you will find statistical references related to both exports and imports. This includes tables featuring productivity indicators derived from manufacturing establishments and the number of individuals employed in each sector, as well as statistics on key indicators of industrial activity spanning from 2016 to 2020. The data also covers the value of outputs and output components, intermediate consumption values, employment breakdowns by nature, economic indicators categorized by industry class, and import and export statistics.

I extend my gratitude to Mr. Aruna Bandara, Director General of the Planning Division at the Ministry of Industries, and his dedicated team for their unwavering support throughout this project. I would also like to express my sincere appreciation to Mr. Kavishka Heshan, Statistician at the Ministry of Industries, and his team members, Mr. Nirosch Chathuranga Pathiraja and Mr. Shamith Rashmika Jayawardane, for their remarkable dedication and collaborative efforts with the DCS, which helped make this data book a reality.

I firmly believe that the 2023 Industrial Data Book will play a crucial role in shedding light on current and future productivity and economic growth trends within the industrial sectors. It has the potential to significantly influence policymaking in the industry sectors and will be valuable to a wide range of data consumers, including policymakers, economic planners, academics, researchers and other interested parties in the future.

J.M. Thilaka Jayasundara
Secretary
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Overview

The year 2022 marked a pivotal period for the automobile industry in Sri Lanka, characterized by significant shifts in consumer preferences, regulatory reforms, and technological advancements. Furthermore, Sri Lanka has faced confluence of challenges and opportunities in 2022 in automobile industry.

Economic uncertainties, fluctuating exchange rates, and supply chain disruptions posed challenges for automobile manufacturers, impacting production schedules and pricing dynamics. Soaring inflation, currency depreciation, and rising fuel prices dampened consumer confidence and reduced purchasing power, leading to a significant decline in new vehicle registrations. Sales plunged by nearly 50% compared to 2021. Government measures to curb foreign exchange usage tightened import regulations, impacting the availability of Completely Built Units (CBUs) and Completely Knocked Down (CKD) kits.

Sri Lanka's assembly operations primarily handle small-scale production, leaving the industry heavily reliant on imports. Lack of robust local manufacturing hampered growth and resilience. Infrastructure limitations, particularly in charging infrastructure for electric vehicles, hindered the widespread adoption of alternative fuel vehicles, requiring concerted efforts from both public and private sectors.

Despite challenges posed by the COVID-19 pandemic, the Sri Lankan automobile industry experienced resilience and adaptability, with a gradual recovery observed in vehicle sales and production. Established assemblers like Mahindra & Mahindra, Suzuki, and Ashok Leyland maintained their presence, although facing production slowdowns. The demand for both new and used vehicles remained steady, driven by factors such as urbanization, rising disposable incomes, and a growing middle class.

Increasing awareness about environmental sustainability and fuel efficiency prompted a surge in the adoption of electric and hybrid vehicles, supported by government incentives and policies promoting green transportation solutions. New entrants like Micro Cars and VEEM ventured into electric mobility solutions.

Government initiatives aimed at reducing carbon emissions and promoting cleaner energy sources led to the introduction of stricter emission standards and incentives for electric vehicle adoption. The automotive industry witnessed rapid technological advancements, with innovations in electric vehicle technology, autonomous driving systems, and connected car features gaining prominence.

The growing demand for electric and hybrid vehicles presented lucrative opportunities for automotive manufacturers and investors, driving investments in research and development of eco-friendly technologies. Collaboration between government agencies, industry stakeholders, and international partners facilitated knowledge exchange and capacity building, fostering innovation and sustainable growth in the automobile sector.

Government initiatives promoting EVs, coupled with rising fuel costs, sparked interest in eco-friendly alternatives. However, limited charging infrastructure remained a hurdle. Government efforts to encourage local value addition through tax breaks and concessionary schemes aimed to bolster domestic production in the long run. Growth in tourism and economic recovery could lead to a rebound in demand for new vehicles in the future.

In 2022, the Sri Lankan automobile industry navigated through a period of transformation, characterized by evolving consumer preferences, regulatory reforms, and technological advancements. While challenges persisted, the industry embraced opportunities for innovation and sustainability, setting the stage for continued growth and development in the years to come.

Table 1 : Manufacture of motor vehicles, trailers and semi-trailers Contributions to the GDP at Current and Constant Market Price (2018 -2022)

Year	Current market price		Constant market price	
	Contribution price (Rs. Mn)	Share (%)	Contribution price (Rs. Mn)	Share (%)
2018	2,665	0.02	3,241	0.02
2019	5,174	0.03	3,373	0.03
2020	6,131	0.04	3,471	0.03
2021	7,007	0.04	3,636	0.03
2022	9,982	0.04	3,365	0.03

Source : Department of Census and Statistics

Figure 1 : Contribution of the Manufacture of motor vehicles, trailers and semi-trailers to the share of the manufacturing industry to the GDP

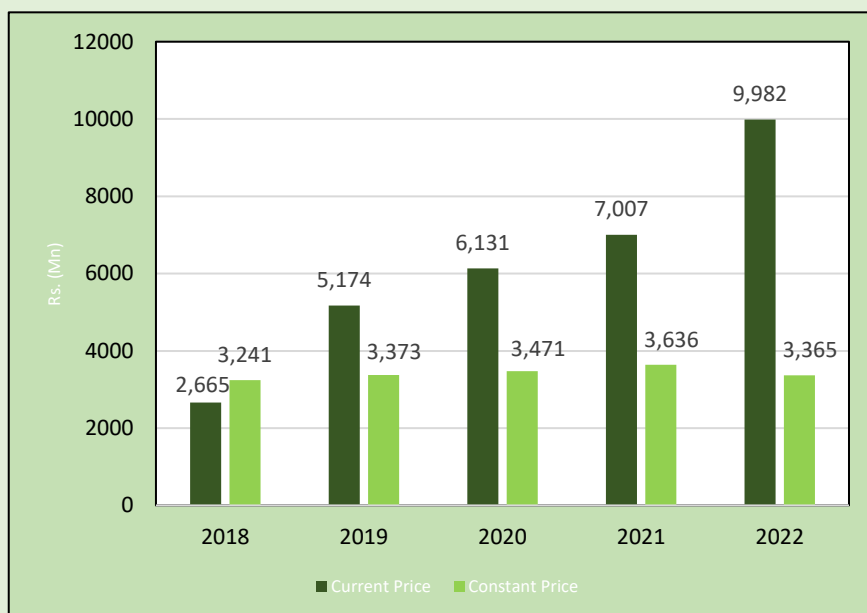


Figure 2 : The Share of the Manufacture of motor vehicles, trailers and semi-trailers Sector to the GDP

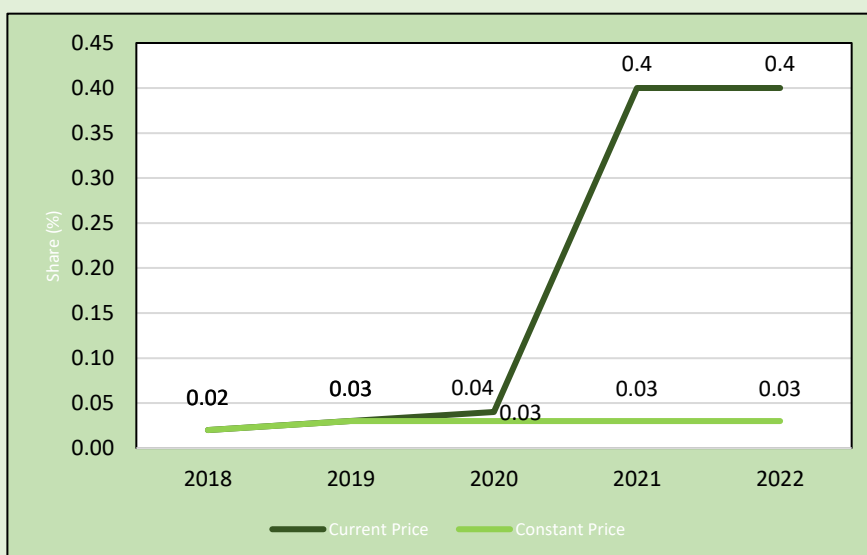


Table 2 : Manufacturing Establishments and Number of Persons Engaged of The Share of the Manufacture of motor vehicles, trailers and semi-trailers

Year	Establishments less than 25 persons engaged		Establishments 25 or more persons engaged	
	No. of Establishments	Persons engaged	No. of Establishments	Persons engaged
2016	21	221	10	820
2017	28	278	12	948
2018	43	469	15	1,111
2019	29	316	15	1,124
2020	19	129	29	2,368

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

Table 3 : Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of of the Manufacture of motor vehicles, trailers and semi-trailer (2016) (Establishments with 5 or more persons engaged)

2016								
Size Class	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	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 4 : Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged Size Class of of the Manufacture of motor vehicles, trailers and semi-trailer (2017) (Establishments with 5 or more persons engaged)

2017								
Size Class	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	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 5 : Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size Class of of the Manufacture of motor vehicles, trailers and semi-trailer (2018)
(Establishments with 5 or more persons engaged)

2018								
Size Class	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	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	55,527,734
100 & above	2	526	526	353,413,319	20,836,513,604	6,604,516,953	4,231,996,651	222,627,220
Group total	58	1,580	1,525	761,578,737	22,147,710,228	7,260,846,187	4,886,864,042	381,615,803

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

Table 6 : Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size Class of of the Manufacture of motor vehicles, trailers and semi-trailer (2019)
(Establishments with 5 or more persons engaged)

2019								
Size Class	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	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 7 : Principal Indicators of Industrial Activity Classified by Industry Division & Persons Engaged
Size Class of of the Manufacture of motor vehicles, trailers and semi-trailer (2020)
(Establishments with 5 or more persons engaged)

2020								
Size Class	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	90	60	17,509,000	196,033,411	142,527,457	53,505,954	1,345,425
10 to 99	26	1,065	1,034	426,588,444	1,203,444,798	785,398,984	418,045,814	192,138,965
100 & above	6	1,342	1,342	865,880,422	41,539,422,602	33,047,932,206	8,491,490,396	521,199,220
Group total	48	2,497	2,436	1,309,977,866	42,938,900,811	33,975,858,647	8,963,042,164	714,683,610

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

Table 8 : Manufacturing of Manufacture of motor vehicles, trailers and semi-trailer Per Head Labour Productivity

Year	Per head Labour Cost	Per head Labour Productivity	Labour Cost to Productivity Ratio
2016	438,114	4,146,283	9.46
2017	515,105	4,023,760	7.81
2018	499,396	3,204,501	6.42
2019	495,006	3,131,833	6.33
2020	548,021	18,248,829	33.30

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

Figure 3 : Manufacturing of Automobile Industry Per Head Labour Productivity and Labour Cost

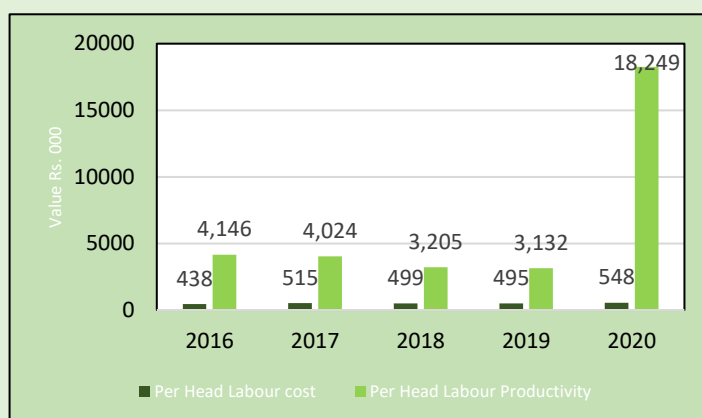


Table 9 : Value of Output & Output Components Classified by Manufacture of motor vehicles, trailers and semi-trailer - (Establishments 25 or more engaged)

Year	Output (Rs.)	Shipped (Rs.)/ products moved of the establishment (Rs.)	Change in Stocks (Rs.)	Industrial services & other revenue (Rs.)
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
2020	236,639,856,000	218,174,600,000	20,556,000	18,444,700,000

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

Table 10 : Value of Intermediate Consumptions & Intermediate Consumptions Components Classified by Manufacture of motor vehicles, trailers and semi-trailer - (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 consumed (Rs.)
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
2020	33,812,602,210	32,406,494,432	1,317,046,765	89,061,013

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

Table 11 : Employment by Nature of Employment & Gender Classified by Industry Divisions of

Manufacture of motor vehicles, trailers and semi-trailer - (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	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
2020	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

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

Table 12 : Economic Indicators of Industrial Activity Classified by Automobile Industry Class – (Establishments with 25 or more persons engaged)

Table 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
2016	51,308,865	1.25	17.93	10,261,773	0.25	3.59
2017	51,308,865	1.25	17.93	2,861,374	0.25	3.59
2018	51,308,865	1.25	17.93	10,261,773	0.25	3.59
2019	47,077,566	1.25	16.45	9,543,575	0.25	3.34
2020	47,077,600	1.25	16.45	9,543,600	0.25	3.34

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

Table 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
2016	512,695	1.71	0.67	212,912	0.71	0.28
2017	5,287,403	1.37	7.77	680,829	0.37	2.30
2018	5,004,709	1.36	3.92	1,333,003	0.36	1.04
2019	5,378,346	1.30	3.72	1,234,626	0.30	0.85
2020	6,264,500	1.29	4.71	1,412,200	0.29	1.06

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

Table 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
2016	5,005,850	1.22	1.86	895,063	0.22	0.33
2017	4,531,428	1.22	1.84	2,461,768	0.22	0.33
2018	931,598	1.91	0.34	443,126	0.91	0.16
2019	955,532	1.56	0.36	341,794	0.56	0.13
2020	922,400	1.58	0.37	336,900	0.58	0.14

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

Table 13 : Economic Indicators of Industrial Activity Classified by Manufacture of motor vehicles, trailers and semi-trailers - (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
2016	703,834	1.93	1.84	338,562	0.93	0.89
2017	893,539	2.13	1.16	474,459	1.13	0.62
2018	1,512,265	2.22	1.34	830,178	1.22	0.73
2019	1,706,830	1.43	1.43	510,122	0.43	0.43
2020	1,834,400	1.45	1.39	568,900	0.45	0.43

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

Table 14 : Categories of Employees by Nature of Employment Classified by Manufacture of motor vehicles, trailers and semi-trailers

Year	Employees (No.)	Skilled (No.)	Unskilled (No.)
2016	815	381	163
2017	940	505	150
2018	1,096	566	190
2019	1,109	574	194
2020	2,340	1,272	377

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

Table 15 : Automobile Imports (2020 - 2022)

Description	Unit	2020		2021		2022	
		Qty	Value (Rs.)	Qty	Value (Rs.)	Qty	Value (Rs.)
Vehicles other than railway or tramway rollingstock, and parts and accessories thereof	No	14,747,948	102,242,595,007	947,818	49,893,270,492	536,848	21,967,420,462
Vehicles other than railway or tramway rollingstock, and parts and accessories thereof	kg	18,661,251	9,525,760,694	48,862,454	33,853,234,185	32,656,558	33,216,786,238

Source: Sri Lanka Customs

Table 16 : Automobile Exports (2020 - 2022)

Description	Unit	2020		2021		2022	
		Qty	Value (Rs.)	Qty	Value (Rs.)	Qty	Value (Rs.)
Vehicles other than railway or tramway rollingstock, and parts and accessories thereof	No	493,745	9,210,421,339	896,563	16,241,500,251	618,851	25,692,607,514
Vehicles other than railway or tramway rollingstock, and parts and accessories thereof	kg	3,303,274	1,590,888,397	3,607,178	1,917,935,149	7,698,478	7,011,551,383

Source: Sri Lanka Customs