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**INDUSTRY**

**DATA**

**BOOK**

**BOAT BUILDING SECTOR**



**MINISTRY OF INDUSTRIES**

# **BOAT BUILDING 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

Sri Lanka has a long tradition of boat building, especially in coastal regions where fishing and maritime activities are prevalent. Traditional boat building techniques have been passed down through generations, with craftsmen using materials such as wood, fiberglass, and sometimes even steel to construct various types of boats ranging from fishing vessels to pleasure crafts.

In recent years, there has been some modernization in the boat building industry in Sri Lanka, with the adoption of more advanced materials and technologies to improve efficiency and durability. This includes the use of computer-aided design (CAD) software for design purposes and the incorporation of modern propulsion systems and navigation equipment into newly constructed boats.

The industry also faces challenges such as competition from cheaper imported boats and fluctuating demand for certain types of vessels. Additionally, environmental concerns related to overfishing and pollution can impact the sustainability of the industry in the long term.

It's important to note that the specifics of the boat building industry in Sri Lanka in 2022 may vary based on factors such as regional differences, economic conditions, and government policies.

The industry continued its growth trajectory, generating around US \$100 million in exports, signifying a 40% increase in 9 years. It was identified as a key visionary sector in the National Export Strategy 2018-2022, highlighting its potential for further contribution to the economy. The government allocated funds to improve infrastructure and regulations for the industry, excluding fishing boats.

## Strengths and Specialties:

- Diversified production, including fiberglass and steel hull vessels, catering to various needs.
- Expertise in high-speed patrol boats, used by the Sri Lankan Navy and commercially for passenger transport.
- Competence in offshore energy support vessels, catering to the growing oil & gas and wind energy sectors.
- Strong reputation for building work boats, harbor craft, and leisure/pleasure crafts for the thriving tourism industry.

## Challenges and Opportunities:

- Global economic slowdown potentially impacting export demand.
- Need for skilled workforce development to meet industry growth.
- Further regulatory improvements to enhance international competitiveness.
- Exploring new markets and niche segments for diversification.

2022 was a positive year for Sri Lanka's boat building industry, showcasing its potential for continued growth and contribution to the national economy. However, addressing challenges and capitalizing on opportunities will be crucial for further success.

**Table 1 : Manufacturing Establishments and Number of Persons Engaged of Building of ships and boats**

Year	Establishments 25 or more persons engaged	
	No. of Establishments	Persons engaged
2016	20	5,360
2017	15	5,274
2018	15	4,076
2019	15	5,186
2020	20	3,466

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

**Table 2 : Principal Indicators of Industrial Activity Classified by Industry of Building of ships and boats (Establishments with 25 or more persons engaged)**

Year	No. of establishments	Persons engaged	Employees	Salary & Wages	Output (Rs.)	Intermediate consumptions (Rs.)	Value added (Rs.)	Gross addition to fixed assets (Rs.)
2016	20	5,360	5,341	2,171,529,113	18,768,881,610	11,704,217,216	7,064,664,394	120,569,659
2017	15	5,274	5,268	2,183,560,435	19,047,845,104	11,580,954,808	7,466,890,296	120,832,953
2018	15	4,076	4,070	1,743,499,451	15,739,225,269	9,400,542,701	6,338,542,701	103,425,750
2019	15	5,186	5,178	2,137,148,837	20,546,747,042	13,752,302,570	6,794,444,472	145,640,639
2020	20	3,466	3,455	1,462,277,397	11,897,902,640	7,927,227,393	3,970,675,247	98,302,195

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

**Table 3 : Value of Output & Output Components Classified by of Building of ships and boats Industry Establishments 25 or more engaged**

Year	Output (Rs.)	Shipped (Rs.)/ products moved of the establishment (Rs.)	Change in Stocks (Rs.)	Industrial services & other revenue (Rs.)
2016	18,768,881,610	18,742,445,659	(94,986,376)	121,422,326
2017	19,047,845,103	18,961,523,303	(77,943,596)	164,265,396
2018	15,739,225,269	15,454,485,182	(18,824,945)	303,565,031
2019	20,546,747,042	20,404,269,899	(69,184,532)	211,661,674
2020	11,897,902,640	11,686,932,108	28,000,374	182,970,158

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

**Table 4: Boat Building Products Imports (2020-2022)**

Description	2020		2021		2022	
	Qty (No.)	Value (Rs.)	Qty (No.)	Value (Rs.)	Qty (No.)	Value (Rs.)
Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods.	3	199,566,024	11	1,270,072,058	7	984,522,807
Fishing vessels; factory ships and other vessels for processing or preserving fishery products	7	48,048,998	2	151,086	-	-
Yachts and other vessels for pleasure or sports; rowing boats and canoes (+)	228	83,232,971	401	167,836,533	157	61,019,923
Tugs and pusher crafts	1	20,800,509	2	173,593,879	1	8,254,617
Light vessels, fire- floats, dredgers, floating cranes, and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms.	6	112,392,487	2	130,657,278	32	6,408,199,033
Other vessels, including warships and lifeboats other than rowing boats	5	455,457,444	532	76,908,668	2	129,693,004
Other floating structure (for example, rafts, tanks, coffer-dams, landing-stages, buoys and beacons.)	66,436	184,648,775	9,980	230,953,030	5,374	96,825,637
Vessels and other floating structures for breaking up	8	16,562,815	1	881,165	1	2,352,624
<b>Grand Total</b>	<b>66,694</b>	<b>1,120,710,023</b>	<b>10,931</b>	<b>2,051,053,697</b>	<b>5,574</b>	<b>7,690,867,645</b>

Source: Sri Lanka Customs



**Table 5: Boat Building Products Exports (2020-2022)**

Description	2020		2021		2022	
	Qty (No.)	Value (Rs.)	Qty (No.)	Value (Rs.)	Qty (No.)	Value (Rs.)
Cruise ships, excursion boats, ferry-boats, cargo ships, barges and similar vessels for the transport of persons or goods.	10	126,135,498	6	6,608,678,438	4	3,846,868,565
Fishing vessels; factory ships and other vessels for processing or preserving fishery products	306	114,082,955	646	260,357,726	620	363,506,081
Yachts and other vessels for pleasure or sports; rowing boats and canoes (+)	1,876	185,330,577	2,598	710,429,340	1,834	808,839,728
Tugs and pusher crafts	-	-	-	-	-	-
Light vessels, fire- floats, dredgers, floating cranes, and other vessels the navigability of which is subsidiary to their main function; floating docks; floating or submersible drilling or production platforms.	1	1,570,372	-	-	-	-
Other vessels, including warships and lifeboats other than rowing boats	1	14,435,411	3	16,593,405	7	272,538,097
Other floating structure (for example, rafts, tanks, coffer-dams, landing-stages, buoys and beacons.)	-	-	38	1,035,963	9	377,116,924
Vessels and other floating structures for breaking up	-	-	-	-	-	-
<b>Grand Total</b>	<b>2,194</b>	<b>441,554,813</b>	<b>3,291</b>	<b>7,597,094,872</b>	<b>2,474</b>	<b>5,668,871,869</b>

Source: Sri Lanka Customs