

Socio-Economic & Marketing Research Division

Overview

The **Socio-Economic & Marketing Research Division** conducts comprehensive research on the social, economic, and marketing aspects of Sri Lanka's fisheries sector. The division serves as the primary source of fisheries industry statistics, producing the definitive annual **Fisheries Industry Outlook** that guides policy formulation, industry planning, and investment decisions.

By analyzing production patterns, trade dynamics, market trends, and socio-economic conditions of fishing communities, the division provides essential intelligence for sustainable development of the fisheries sector and improvement of fisher livelihoods.

Leadership & Contact

Head of Division

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Key Functions & Responsibilities

Fisheries Statistics Compilation

- Collection and compilation of comprehensive fisheries production data
- Analysis of catch statistics by species, fishing method, and region
- Fleet statistics and fishing effort documentation
- Aquaculture production data compilation
- Time series analysis of fisheries trends

Trade & Marketing Analysis

- Export and import statistics of fish and fishery products
- Market price monitoring and analysis
- Trade flow analysis (bilateral and multilateral)
- Value chain analysis from producer to consumer
- International market trends research

Socio-Economic Research

- Socio-economic conditions of fishing communities
- Livelihood analysis of fishermen and fish workers
- Income and expenditure studies
- Employment patterns in fisheries sector
- Social welfare and development programs evaluation

Economic Analysis

- Economic contribution of fisheries to national GDP
- Cost-benefit analysis of fisheries interventions
- Investment analysis in fisheries infrastructure
- Economic viability studies of fishing operations
- Return on investment for aquaculture and fishing businesses

Consumption Studies

- Per capita fish consumption patterns
- Regional consumption preferences
- Nutritional contribution of fish to diet
- Seasonal variation in consumption
- Market demand forecasting

Industry Infrastructure Analysis

- Fishing craft and boat statistics
- Ice production capacity and distribution
- Fishing net and gear manufacturing data
- Processing plant capacity and utilization
- Fishery harbor and anchorage facilities inventory

Services Offered

Annual Publications

Fisheries Industry Outlook (Annual Handbook)

The flagship publication of the division, serving as the comprehensive statistical handbook of the fishery industry. This essential reference document includes:

Production Statistics:

- **Marine Coastal Fisheries:** Small-scale fishing operations along the coast
- **Offshore/High Sea Fisheries:** Deep-sea fishing operations
- **Inland Capture Fisheries:** Reservoir, tank, and river fisheries
- **Seasonal Water Body Culture:** Culture fisheries in tanks and ponds
- **Coastal Aquaculture:** Shrimp farming, fish cage culture, and other brackishwater operations
- Species-wise production breakdown
- Fishing method and gear-wise categorization
- District and regional production analysis

Trade & Marketing Information:

- **Export Data:** Quantity, value, and destination of fish exports
 - Fresh, chilled, and frozen fish
 - Canned fish products
 - Dried and salted fish
 - Ornamental fish (live exports)
 - Value-added products
- **Import Data:** Quantity, value, and source of fish imports
 - Canned fish and other processed products
 - Fresh and frozen fish
 - Fish meal and feed ingredients
- **Canned Fish Production:** Domestic production statistics
- **Fish Prices:** Wholesale and retail price trends for major species

Consumption Data:

- Per capita fish consumption (annual and regional)
- Fish as percentage of animal protein intake
- Consumption patterns by fish type
- Urban vs. rural consumption differences
- Nutritional contribution analysis

Industry Infrastructure:

- **Fishing Crafts/Boats:** Classification and numbers by type
 - Traditional craft (Oru, Theppam, Wallam)
 - Non-motorized boats
 - Motorized boats (Inboard, Outboard)
 - Multi-day boats
 - Deep-sea fishing vessels

- **Ice Production:** Capacity and distribution by location
- **Net Production:** Fishing gear manufacturing statistics
- **Fish Harbors:** List of major and minor fishery harbors with facilities
- **Anchorage:** Fish landing sites around the coast

Socio-Economic Indicators:

- Number of fishing families and fisher population
- Employment in fisheries sector (direct and indirect)
- Welfare schemes and beneficiaries
- Cooperative societies and membership
- Fisher organizations and representation

World Fisheries Context:

- Global fish production trends
- Regional fisheries statistics
- International trade patterns
- Emerging technologies and trends
- Policy developments in major fishing nations

Customized Research Reports

- Market feasibility studies for new fisheries projects
- Economic impact assessments
- Value chain analysis for specific species or products
- Price analysis and forecasting
- Investment opportunity identification

Advisory Services

- Policy recommendations based on data analysis
- Market intelligence for industry stakeholders
- Economic feasibility assessment for entrepreneurs
- Trade facilitation guidance
- Social development program design support

Data Services

- Historical fisheries data provision
- Statistical analysis support for research
- Database access for authorized users
- Customized data compilation
- Trend analysis and forecasting

Data Sources & Methodology

Primary Data Sources

Governmental Organizations:

- **Department of Fisheries and Aquatic Resources (DFAR):** Primary source for catch and effort data, licensing, and regulatory information
- **Planning and Monitoring Division:** Project implementation data and monitoring reports
- **Customs Department:** Export-import data verification
- **Census and Statistics Department:** Demographic and economic data
- **Ministry of Fisheries:** Policy documents and program information

Semi-Governmental Organizations:

- Ceylon Fisheries Corporation
- National Aquaculture Development Authority (NAQDA)
- Ceylon Fishery Harbours Corporation
- Industrial Development Board
- Export Development Board

Non-Governmental Organizations:

- Fisher cooperatives and societies
- Industry associations (exporters, processors)
- Research institutions and universities
- Development NGOs working with fishing communities

Private Sector:

- Fish exporters and processors
- Aquaculture companies
- Ice plant operators
- Fishing gear manufacturers and suppliers

Data Collection Methods

- Structured surveys and questionnaires
- Key informant interviews
- Focus group discussions with fishing communities
- Market surveys and price monitoring
- Review of official records and documents
- Field observations and case studies

Data Quality Assurance

- Cross-verification from multiple sources
- Consistency checks and validation
- Time series analysis for anomaly detection
- Expert review of compiled data
- Feedback from stakeholders
- Regular data audits

Research Areas & Analytical Work

Production Analysis

- Seasonal variation in catches
- Impact of weather and climate on production
- Fishing effort and catch per unit effort (CPUE) trends
- Species composition changes over time
- Regional production patterns and potentials
- Comparison of artisanal vs. industrial fisheries

Economic Analysis

- Contribution of fisheries to national economy
- Cost structure of different fishing operations
- Profitability analysis by fishing method
- Economic efficiency of the fishing fleet
- Impact of fuel prices on fishing economics
- Return on investment for aquaculture ventures

Market Analysis

- Domestic market dynamics and price formation
- Export market trends and opportunities
- Import substitution possibilities
- Value addition economics
- Marketing margins and efficiency
- Consumer preferences and behavior

Trade Analysis

- Bilateral and multilateral fish trade patterns
- Export competitiveness analysis
- Tariff and non-tariff barriers to trade
- Trade agreements impact on fisheries
- Market diversification strategies
- Quality and certification requirements in export markets

Social Analysis

- Livelihood vulnerability of fishing communities
- Gender roles and women's participation in fisheries
- Poverty levels among fishing families
- Education and health status of fisher communities
- Social networks and community organization
- Impact of development interventions on livelihoods

Welfare Studies

- Effectiveness of fisher welfare schemes
- Insurance and social security coverage
- Housing and sanitation conditions
- Access to credit and financial services
- Social safety nets during fishing bans or disasters

Major Research Outputs

Fisheries Industry Outlook Series

Annual editions providing comprehensive industry statistics, with historical series spanning multiple decades enabling:

- Long-term trend analysis
- Policy impact evaluation
- Comparative studies
- Forecasting and projection
- International benchmarking

Special Reports

- **Species-Specific Studies:** Detailed economic analysis of major commercial species
- **Regional Studies:** In-depth analysis of fisheries in specific regions
- **Market Studies:** Comprehensive analysis of domestic and export markets
- **Social Impact Assessments:** Evaluation of policies and programs on fisher welfare
- **Economic Impact Studies:** Assessment of fisheries contribution to regional and national economy

Policy Briefs

- Concise analysis of policy issues
- Evidence-based recommendations
- Stakeholder perspectives
- Best practice examples
- Implementation considerations

Collaboration & Partnerships

National Level

- **Department of Fisheries and Aquatic Resources:** Primary implementing agency for fisheries management
- **Ministry of Fisheries:** Policy formulation and program planning
- **National Aquaculture Development Authority (NAQDA):** Aquaculture development statistics
- **Export Development Board:** Export promotion and market access
- **University Departments:** Academic research collaboration
- **NGOs:** Community-level data and grassroots perspectives

International Level

- **Food and Agriculture Organization (FAO):** Global fisheries statistics reporting
- **Bay of Bengal Programme Inter-Governmental Organisation (BOBP-IGO):** Regional fisheries cooperation
- **Southeast Asian Fisheries Development Center (SEAFDEC):** Regional statistics standardization
- **World Bank and ADB:** Development project evaluations
- **International research institutions:** Collaborative research studies

Utilization of Division's Outputs

Policy Formulation

- Evidence base for fisheries management policies
- Identification of priority areas for intervention
- Evaluation of policy effectiveness
- Adaptive management support

Industry Planning

- Investment decisions by private sector
- Business planning for fisheries enterprises
- Market entry strategies for new products
- Risk assessment and mitigation

Development Planning

- National and regional development plans
- Poverty reduction strategies
- Food security planning
- Infrastructure development priorities

Academic Research

- Data source for university research
- Baseline information for detailed studies
- Trend analysis and modeling
- Socio-economic research foundation

International Reporting

- FAO fisheries statistics submissions
- Regional fisheries management organization reporting
- Sustainable Development Goal (SDG) indicator tracking
- International trade negotiations

Major Achievements

- Four decades of continuous fisheries statistics compilation
- Comprehensive annual Fisheries Industry Outlook publication
- Essential data support for policy formulation
- Contribution to sustainable fisheries management
- Recognition as authoritative source of fisheries statistics
- Support for fisheries research community
- Capacity building in fisheries economics and social research

Challenges & Responses

Data Collection Challenges

- **Dispersed fishing operations:** Network of field assistants and enumerators
- **Informal sector data:** Participatory approaches and estimation methods
- **Resource constraints:** Prioritization and sampling strategies
- **Data quality variability:** Quality assurance protocols and validation

Analytical Challenges

- **Complex value chains:** Detailed value chain mapping
- **Dynamic markets:** Regular market surveys and monitoring
- **Incomplete records:** Triangulation from multiple sources
- **Emerging issues:** Adaptive research agenda

Future Directions

Methodological Improvements

- Adoption of digital data collection tools
- Real-time data capture and reporting
- Geographic Information System (GIS) integration
- Advanced statistical and econometric techniques

- Predictive modeling and forecasting

Scope Expansion

- Value chain analysis for all major species
- Climate change impact assessment on fisheries economics
- Blue economy contribution measurement
- Gender-disaggregated data collection and analysis
- Recreational fisheries economic assessment

Technology Integration

- Online data portal for stakeholder access
- Interactive data visualization dashboards
- Mobile applications for data dissemination
- Big data analytics for market intelligence
- Artificial intelligence for forecasting

Capacity Building

- Training in fisheries economics and social research
- Advanced statistical analysis techniques
- Survey methodology and sampling
- Participatory research approaches
- Communication and data visualization skills

Contact Information

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For Fisheries Industry Outlook publication, customized data requests, or research collaboration inquiries, please contact the division.