



INDUSTRY CAPABILITY REPORT



The Ornamental Fish Industry in Sri Lanka

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Export Development Board (EDB), Sri Lanka
March, 2025

TABLE OF CONTENTS

1. INTRODUCTION	1
2. EMPLOYMENT OPPORTUNITIES	1
3. KEY ORNAMENTAL SPECIES AND VARIETIES.....	2
4. EXPORT PERFORMANCE	3
5. ORNAMENTAL FISH PRODUCTION AND CONTRIBUTION TO ECONOMY	3
6. KEY PLAYERS	5
7. GOVERNMENT POLICY AND SUPPORT AVAILABLE IN THE SECTOR.....	5
8. INFRASTRUCTURE AVAILABLE FOR THE SECTOR.....	6
9. POTENTIAL FOR EXPANSION IN THE SECTOR.....	6
10. STRENGTHS AND WEAKNESSES OF THE SECTOR	7
11. REFERENCES.....	7

1. INTRODUCTION

The ornamental fish industry in Sri Lanka is a vibrant and growing sector within the country's broader aquaculture and export markets. Known for its rich biodiversity and favourable climatic conditions, Sri Lanka is a significant player in the global ornamental fish trade, particularly within the South Asian region. In 2024, the country exported ornamental fish valued at US\$ 24.46 million, with a total quantity of 516,389 kg. Sri Lanka exports marine, freshwater, and brackish-water fish species, along with marine invertebrates, to the international market. Marine fish and invertebrates are mostly collected by scuba diving and snorkelling, whereas freshwater fish are bred in captivity by small & medium-scale operations.

Sri Lanka hosts 111 different species of ornamental fish thriving in freshwater, brackish, and marine environments. There are around 85 active exporting companies, with significant markets in more than 68 countries including USA, Japan, and the European Union leading the demand for Sri Lankan ornamental fish.

Among the freshwater fish species exported from Sri Lanka, fancy guppies rank the highest, making up 66% of exports. They are followed by swordtails, platys, barbs, angelfish, gourami's, catfish, and various species of tetras.

2. EMPLOYMENT OPPORTUNITIES

The ornamental fish industry in Sri Lanka offers promising employment opportunities, driven by the country's rich biodiversity and favourable climatic conditions. This sector includes various stakeholders such as fish breeders, growers, collectors, exporters, and retailers. Breeders play a crucial role in cultivating a variety of ornamental fish species, while collectors, often based in rural areas, gather these species from natural habitats. Many are engaged as self-employers in the ornamental fish production, contributing to increase employment opportunities for women and youngsters.

Exporters contribute significantly by marketing and shipping these fish to international markets, capitalizing on Sri Lanka's reputation for high-quality ornamental fish. Retailers, both local and international, create jobs through the sale of these fish and related products. The government and non-governmental organizations also play vital roles, providing training, resources, and support to enhance sustainable practices and ensure the industry's growth. As global demand for ornamental fish continues to rise, Sri Lanka's industry holds substantial potential for economic development and job creation.

3. KEY ORNAMENTAL SPECIES AND VARIETIES

Marine species:

- Butterflyfish
- Angelfish
- Tang fish
- Clownfish



Freshwater species

- Guppy
- Swordtail
- Platy
- Molly
- Tetra
- Barb
- Angelfish
- Goldfish
- Fighter fish
- Gourami
- Discus
- Catfish
- Carp



Marine Invertebrates:

- Sea anemone
- Shrimps
- Crabs
- Starfish
- Sea horses
- Sea urchin



4. EXPORT PERFORMANCE

The United States, China, Australia, United Kingdom, Germany, Saudi Arabia, Canada, UAE are the major export markets for the Sri Lankan ornamental fish industry in 2024.

Table 01: Top destinations of Sri Lankan Ornamental Fish

Country	2023		2024	
	Quantity (Kg)	Value (USD)	Quantity (Kg)	Value (USD)
World		26,390,079		24,464,536
United States	214,166	11,341,349	234,196	10,043,784
China	14,422	1,689,882	15,342	1,741,960
Australia	11,477	922,567	10,290	1,714,143
United Kingdom	29,130	1,470,035	32,123	1,516,706
Germany	41,346	1,462,442	27,732	1,113,419
Saudi Arabia	26,740	784,251	22,351	791,195
Canada	17,187	860,023	13,358	708,988
United Arab Emirates	28,993	629,103	25,131	592,792
Korea South (Korea, Republic of)	10,317	545,780	12,324	499,800
Poland	12,494	712,312	12,220	460,733
France	9,896	542,411	8,893	450,389
Japan	6,440	590,911	6,180	449,610
Italy	10,718	529,298	9,721	446,125

Source: Sri Lanka Customs

Presently, there are about 85 registered aquarium fish exporters in Sri Lanka, contributing around 8% of the global demand for ornamental freshwater fish. Among the freshwater fish species exported from Sri Lanka, the guppy ranks the highest, followed by marine fish/invertebrates, tetras, swordtails, platies, and various species of mollies

5. ORNAMENTAL FISH PRODUCTION AND CONTRIBUTION TO ECONOMY

Ornamental fish production significantly boosts the economy by creating jobs and generating export revenue. This industry offers self-employment opportunities, by supporting job creation and economic growth. Exporting ornamental fish brings in foreign exchange, improving the trade balance. Additionally, it supports related sectors like aquarium equipment manufacturing and retails.

Table 02: Main Exporting Countries of Ornamental Fish

Exporters	Exported value in 2020	Exported value in 2021	Exported value in 2022	Exported value in 2023	Exported value in 2024
World	335,295	395,467	328,091	339,834	
Japan	46,142	55,085	48,951	48,825	48,312
Indonesia	30,757	34,513	36,425	39,062	40,689
Singapore	31,126	40,495	35,120	33,927	32,821
Sri Lanka	13,484	22,557	21,738	26,381	
Netherlands	22,257	35,402	27,121	22,740	
Thailand	18,229	20,098	18,659	19,935	19,901
Malaysia	15,369	14,032	12,036	17,907	
Myanmar	381	4,240	5,676	17,129	
Czech Republic	21,683	23,516	20,127	14,713	18,344
Spain	34,075	35,684	9,766	12,130	10,966
United Kingdom	18,907	7,490	2,952	9,014	9,039

Source: ITC calculations based on UN COMTRADE and ITC statistics

Table 03: Main Importing Countries of Ornamental Fish

Importers	Imported value in 2020	Imported value in 2021	Imported value in 2022	Imported value in 2023	Imported value in 2024
World	297,844	366,033	350,466	339,229	
United States of America	67,193	94,632	91,709	82,252	77,928
China	23,584	14,117	23,476	40,918	37,281
United Kingdom	20,139	25,349	23,346	20,794	21,522
Malaysia	8,947	12,343	15,772	18,498	
Japan	17,719	21,698	19,740	17,007	15,203
Germany	18,795	22,535	16,672	13,948	14,693
France	9,787	12,394	13,201	12,019	11,499
Singapore	10,125	12,970	12,247	11,932	11,514
Netherlands	16,102	15,314	9,148	8,107	
Spain	6,216	10,623	8,799	8,029	17,049
Canada	6,457	8,144	7,891	7,803	7,436

Source: ITC calculations based on UN COMTRADE and ITC statistics

6. KEY PLAYERS

- Aqua Ceylon International Pvt Ltd
- Aquamarines Pvt Ltd
- Asian Aquarium Pvt Ltd
- Angel Aquarium Pvt Ltd
- City Pet Lanka
- Euro Aqua Farm
- Green Valley Aquacultures Pvt Ltd
- Lumbini Aquaria International Pvt Ltd
- Ocean Dreams Aquatic
- Randika Aquarium Farm House
- Rainbow Aquarium
- Serendib Marine Fish
- Tropical Fish International



7. GOVERNMENT POLICY AND SUPPORT AVAILABLE IN THE SECTOR

The Sri Lankan government has implemented several policies and support mechanisms to bolster the ornamental fish sector, recognizing its economic potential and the opportunities it provides for sustainable employment. Rules and regulations have been formulated and enforced by the Department of Fisheries and Aquatic Resources (DFAR) and the National Aquaculture Development Authority (NAQDA) of Sri Lanka.

Wild-caught ornamental fish collectors must obtain permits from the DFAR. These permits regulate the species that can be collected, the locations, and the methods used. Wild-caught marine fish and invertebrates must be collected by experienced scuba divers, without using any chemicals. These creatures are then carefully quarantined to ensure they reach customers in the best quality. Exporters must obtain health certificates from the NAQDA to ensure that the fish are free from diseases and meet international health standards.

NAQDA also plays an important role in providing technical support and training for ornamental fish breeding and farm management for the people.

Exports of certain species are regulated under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES). Exporters must comply with CITES regulations to ensure that endangered species are protected.

Additionally, the government supports research and development initiatives through National Aquatic Resources Research and Development Authority (NARA) to improve breeding techniques, develop new species, and enhance sustainability in the ornamental fish industry.

8. INFRASTRUCTURE AVAILABLE FOR THE SECTOR

- Hatcheries and Breeding Centers
- Aquaculture Development Centers
- Export Processing Zones
- Quarantine and Inspection Facilities
- Training and Extension Services
- Research and Development Facilities
- Quality Testing Laboratories
- Wholesale Markets and Distribution Centers
- Aquatic Plant Nurseries
- Support Services: Veterinary services, suppliers of fish feed, tanks, and other necessary equipment
- Financial and Technical Assistance Programs

9. POTENTIAL FOR EXPANSION IN THE SECTOR

Sri Lanka's ornamental fish sector holds substantial promise for expansion due to its rich biodiversity and strategic geographical location. The country boasts a diverse array of freshwater and marine species, which are highly sought after in global markets. Supported by government initiatives aimed at promoting the industry through policy frameworks and infrastructure development, Sri Lanka is well-positioned to meet the increasing global demand for ornamental fish. With established expertise in aquaculture and a growing international interest in aquarium hobbyists and decorative fish ponds, the sector offers significant economic potential.

By leveraging these strengths and focusing on sustainable practices and market diversification, Sri Lanka can further enhance its ornamental fish industry, fostering economic growth and job creation across the country.

10. STRENGTHS AND WEAKNESSES OF THE SECTOR

Strengths	Weakness
<ul style="list-style-type: none">• Sri Lanka has a rich biodiversity with a variety of species, making it ideal for exporting unique ornamental fish• The tropical climate is ideal for year-round breeding, providing a steady supply of fish for export• Availability of coral reefs, sand bars, lagoons around the country as well as inland water bodies such as streams, rivers and reservoirs provide ideal grounds for breeding• Long history and substantial experience have cultivated skilled breeders and exporters ensuring high-quality products.• Resource availability for expansion of the industry such as land, freely available water around the country etc.• Significant support from government bodies ensures sustainable practices and market access	<ul style="list-style-type: none">• Overexploitation of wild species and inadequate breeding practices can lead to depletion of wild populations and habitat degradation• The industry must confront strict global regulations, posing significant challenges and costs• The global market is highly competitive with strong players from countries such as Singapore, Malaysia, Thailand etc• Inadequate infrastructure for large-scale breeding and transportation• Challenges to ensure health and disease-free status of fish and requires ongoing investment in biosecurity measures• Shortage of availability, quality, and cost-effectiveness of feeds

11. REFERENCES

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