



EDB
SRI LANKA

NATIONAL EXPORT

DEVELOPMENT PLAN (NEDP)
2026-2030

*Accelerating Sri Lanka's
Export-Led Growth*



TRADE
LOGISTICS



TRADE
FACILITATION



TRADE
FINANCE



TRADE
PROMOTION



QUALITY
MANAGEMENT



SKILL
DEVELOPMENT &
INNOVATION



Government of Sri Lanka

**NATIONAL EXPORT
DEVELOPMENT PLAN
(NEDP)
2026 - 2030**

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ACKNOWLEDGEMENTS

The National Export Development Plan (NEDP) of Sri Lanka 2026–2030 was developed under the Policy-Based Lending Programme of the Ministry of Industry and Entrepreneurship Development, and the Sri Lanka Export Development Board (EDB), with the technical assistance of the Asian Development Bank.

The successful formulation of the NEDP was made possible through the collective efforts, valuable insights, and constructive contributions of representatives from both the public and private sectors. Their expertise, commitment, and active involvement throughout the consultation and formulation process have been instrumental in shaping this national policy framework.

A dedicated NEDP Technical Committee was established to guide and coordinate the design and development process of the Plan. The contributions and cooperation extended by all stakeholders involved in this process are sincerely appreciated.

Special thanks go to Mr. Managala Wijesinghe, Chairman and CEO; and Mr. Erandika Dissanayake, (Acting) Director General of the EDB, for their invaluable guidance, leadership, and continuous encouragement throughout the preparation of the NEDP.

Special appreciation is also extended to Ms. Kumudinie Mudalige, Additional Director General (Dev.), and the team at the Policy and Strategic Planning Division of the EDB for their commitment, coordination, and continuous support in the successful preparation of the NEDP.

NOTE FOR THE READER

The National Export Development Plan (NEDP) 2026–2030 represents the government’s commitment to strengthening Sri Lanka’s export competitiveness and positioning the country more effectively within a rapidly evolving global trade ecosystem. It follows naturally from the National Export Strategy (NES) 2018–2022 and is not a reflection of the NES’s success or failure. The NES laid important groundwork for sector development and institutional collaboration; however, its full implementation was constrained by the pandemic and subsequent economic challenges. The NEDP is a logical continuation of the NES and recognises that all strategic frameworks are time-bound and must be refreshed as global dynamics, technology, supply chains, and market conditions shift.

Accordingly, the NEDP begins with a structured review of progress since 2018 and then updates priorities, actions, and institutional responsibilities to reflect Sri Lanka’s current context and future ambitions. Validated elements of the NES – such as sector roadmaps and cross-cutting enablers – have been absorbed and strengthened. In parallel, new areas – including sustainability standards, digitalisation, services trade, and regional value chain integration – are given greater emphasis. The Plan also incorporates lessons learned from the previous strategy cycle. Through this approach, the NEDP offers a coherent, forward-looking framework designed to translate Sri Lanka’s export potential into sustained, broad-based, and higher-value export growth.

MESSAGE FROM HIS EXCELLENCY THE PRESIDENT



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இலங்கை சனாதிபதி
President of Sri Lanka
Message

Sri Lanka stands at a defining crossroads in its economic history. As we undertake the critical task of rebuilding our economy and restoring confidence in the future, the export sector emerges as an indispensable engine of this transformation. In terms of economic stability and progress, the export from the productive industries seems backbone of the economy.

In recent years, Sri Lankan exporters have demonstrated remarkable resilience in the face of global uncertainties and their perseverance deserves our highest commendation. Our national ambition to achieve USD 36 billion in export earnings by 2030 is not merely an aspirational target, it is a firm commitment to transforming Sri Lanka into a competitive, export-oriented economy capable of holding its own on the world stage. This goal is grounded in the encouraging momentum we have already witnessed, with export earnings reaching record levels, reflecting the unwavering dedication of our exporters to innovation, quality, and value addition.

The export sector is the backbone of our economic recovery and the primary driver of sustainable growth. It generates the foreign exchange earnings that stabilize our economy, creates high-value employment that uplifts families and communities and fosters innovation across a wide spectrum of industries. Our determination to realize USD 36 billion in export revenue by 2030 is formidable, yet it is firmly anchored in the realities of our productive capacity and the dynamism of our private sector.

Sri Lanka's future prosperity will ultimately be determined by our capacity to compete with confidence in global markets. As we advance along the path of economic recovery, the strengthening of our export sector transcends mere economic priority, it is a national imperative. A dynamic, diversified and resilient export base will generate sustainable growth, create quality employment and restore enduring confidence in Sri Lanka's economic future.

This National Export Development Plan (NEDP) has been carefully calibrated to balance robust support for our established sectors with targeted investment in emerging industries. We are committed to strengthening the apparel, tea and rubber-based industries that have long served as pillars of our economy, while simultaneously promoting new export strengths in digital products and services industries. Our market diversification strategy maintains and deepens our established presence in the United States and Europe, while pursuing systematic expansion into the high-growth markets of Africa, Asia and the Middle East. Furthermore, we are committed to deeper integration into ASEAN value chains, via strategically connected node within regional and global production networks.

The realization of this vision depends upon the collective commitment and shared determination of government, industry and all stakeholders. Through innovation, enhanced productivity and a unified national vision, we can build a competitive export economy that generates opportunity for all, strengthens our national resilience, and advances our aspiration of creating a "Thriving Nation and a Beautiful Life" for every Sri Lankan. I call upon all partners in this endeavor to rise to this historic occasion with the determination and excellence that our nation rightfully deserves.

Anura Kumara Dissanayake

President

Democratic Socialist Republic of Sri Lanka

07th May, 2026

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இலங்கைச் சனநாயக சோசலிசக் குடியரசு
Democratic Socialist Republic of Sri Lanka

MESSAGE FROM THE HONOURABLE MINISTER OF INDUSTRY AND ENTREPRENEURSHIP DEVELOPMENT

Sri Lanka is emerging from a period of severe economic disruption that exposed structural weaknesses in production, trade and industrial competitiveness. As the country stabilises, it must reorganise its export base and adapt to a rapidly evolving global landscape.

The Ministry of Industry and Entrepreneurship Development is guided by a clear vision to build a competitive national industrial base that supports sustained and inclusive growth. This requires strengthening local manufacturing, supporting entrepreneurs, and creating a policy environment that enables enterprise, innovation and export expansion.

The National Export Development Plan (NEDP) 2026–2030 forms a central pillar of this effort. It aligns with the government’s broader trade and industrial agenda, which seeks to expand and upgrade the export base, integrate firms into regional and global value chains, and leverage Sri Lanka’s geographic position to develop a competitive logistics and services hub. The Ministry will work closely with the Sri Lanka Export Development Board and relevant public institutions to maintain implementation discipline throughout the Plan period.

A key lesson from the previous export strategy is that export growth cannot be pursued independently of broader economic policy. Expanding scale, increasing value addition and maintaining competitiveness require coordination between export policy and investment, and industrial and skills development strategies. The NEDP responds to sector-specific priorities while reinforcing the overall export ecosystem, thereby supporting higher export performance and improved productivity.

The launch of the NEDP 2026–2030 is a momentous occasion and a step on the road to the government’s vision of a brighter future of sustained and inclusive growth. I look forward to seeing Sri Lanka reap the rewards of its implementation over the next five years.



Sunil Handunneththi (M.P.)

Hon. Minister of Industry and Entrepreneurship Development

MESSAGE FROM THE SECRETARY OF MINISTRY OF INDUSTRY AND ENTREPRENEURSHIP DEVELOPMENT

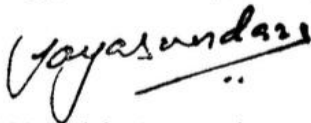
Sri Lanka's long-term economic prosperity hinges on a strong, competitive and adaptive industrial base. Manufacturing, construction and mining remain the backbone of the industrial sector, which drives national outputs and technological advancement while creating quality employment and generating export earnings that strengthen our balance of trade. Building and sustaining the industrial sector is not merely a policy priority; it is a national imperative.

Achieving meaningful industrial growth requires a policy environment that tackles persistent challenges head-on. Infrastructure deficits, skills gaps and restricted access to finance continue to constrain our industries. Strategic policy must bridge these gaps while actively fostering export-oriented enterprises, innovation and deeper integration into global value chains. To be effective, industrial policy must be firmly anchored within Sri Lanka's broader national development vision.

The National Export Development Plan (NEDP) 2026–2030 is a decisive step in that direction. By aligning export development with industrial policy reform, it offers a coherent and actionable framework to enhance Sri Lanka's global competitiveness. It advances key priorities – export diversification, expanded market access, higher quality standards, innovation and trade facilitation – while recognizing that sustainable export growth must be underpinned by a robust domestic production base and a skilled, future-ready workforce.

The NEDP 2026–2030 is more than a planning document; it is a blueprint for transformation. Its successful implementation will accelerate Sri Lanka's transition to a productive, diversified and resilient export-oriented economy, laying a durable foundation for long-term national development and shared prosperity.

The success of this plan will ultimately depend on the collective commitment of all stakeholders; government agencies, the private sector, industry associations and development partners. I call upon each of them to engage actively, align their efforts and take ownership of this shared agenda. Together, we can build an industrial and export ecosystem that is not only competitive on the world stage, but more importantly, delivers lasting opportunity and prosperity to every Sri Lankan.



J.M. Thilaka Jayasundara

Secretary, Ministry of Industry and Entrepreneurship Development

MESSAGE FROM THE CHAIRMAN AND CHIEF EXECUTIVE OFFICER OF THE SRI LANKA EXPORT DEVELOPMENT BOARD

Sri Lanka stands at a defining moment in its economic trajectory. The country is seeking to both consolidate the recovery achieved in recent months and extend its fragile growth. This next phase must be underpinned by productivity-led competitiveness and growth increasingly financed through non-debt inflows, with exports at the centre of the national economic agenda. The National Export Development Plan (NEDP) 2026–2030 is a comprehensive, coordinated response to the structural imperatives facing our economy, and charts a deliberate course towards export diversification, economic de-risking, and deeper integration into regional and global value chains.

The Plan is grounded in clear policy priorities. First, we must lock in the current recovery trajectory while transitioning to growth financed by non-debt inflows. Second, we must position exports as the core engine of sustainable economic expansion. Our ambition is formidable but achievable: \$36 billion in export revenue by 2030, comprising \$28 billion in merchandise exports and over \$8 billion in services-based exports. This target demands sustained export growth of 10%–12% annually – a significant acceleration from historical performance.

The NEDP framework is built on six mutually reinforcing strategic objectives that address both immediate constraints and long-term competitiveness. This strategy deliberately balances horizontal cross-sectoral enablers with targeted sector development, and reflects a deliberate balance between established strengths and emerging opportunities.

The NEDP demands a whole-of-government approach. The reactivation of the Export Development Council of Ministers, alignment with Budget 2026 reform priorities, and the establishment of robust governance and delivery mechanisms create an opportunity to move faster, coordinate better and measure progress transparently. With disciplined execution and sustained partnership across government, the private sector and international partners, Sri Lanka can build a more diverse, innovative and globally competitive export economy over the period ahead.

The Export Development Board remains steadfast in advancing this agenda through data-driven decision-making, strong institutional partnerships and a relentless focus on global competitiveness. The future of Sri Lanka's export sector is not merely promising – it is boundless, provided we sustain collective commitment to the transformative vision outlined in this Plan.



Mangala Wijesinghe
Chairman and Chief Executive Officer

MESSAGE FROM THE COUNTRY DIRECTOR, ASIAN DEVELOPMENT BANK

Sri Lanka stands at a pivotal moment in its economic recovery. A renewed focus on exports will be central to restoring growth, creating quality jobs, and strengthening resilience. In an increasingly complex and competitive global environment, the ability to diversify exports, move up value chains, and expand into new markets will shape the country's development trajectory in the years ahead. The National Export Development Plan (NEDP) 2026–2030 provides a clear and strategic framework to advance these priorities.

The NEDP builds on the foundations of the National Export Strategy 2018–2022. It draws on the experience gained since 2018 while also responding to a changing global trade landscape and the evolving needs of Sri Lanka's export ecosystem. The Plan sets a renewed direction for the next phase of export-led growth.

A defining strength of the NEDP is its focus on implementation and results. By sequencing actions, prioritising reforms, and generating early momentum, the Plan aims to deliver tangible outcomes for exporters, particularly small and medium-sized enterprises, and enhance Sri Lanka's competitiveness. The allocation of resources in the 2026 national budget underscores the Government of Sri Lanka's commitment to implementation and early delivery.

The Asian Development Bank supports the NEDP in partnership with the Government of Sri Lanka to advance trade, investment, and industry development. The NEDP is designed as an adaptive framework, to be reviewed and refined in response to evolving global dynamics and emerging opportunities. Through close collaboration with both public and private sector stakeholders, the Asian Development Bank remains committed to supporting Sri Lanka to unlock the full potential of its export sector and build a more resilient, inclusive, and prosperous economy.

Asian Development Bank

Country Director for Sri Lanka

ABBREVIATIONS

Note: In this document, “\$” refers to United States dollars.

Abbreviation	Full form
AEO	Authorised Economic Operator
AI	Artificial Intelligence
ASEAN	Association of Southeast Asian Nations
B2B	Business-To-Business
B2C	Business-To-Consumer
BOI	Board of Investment (Sri Lanka)
BPM	Business Process Management
EDB	Export Development Board
EDCM	Export Development Council of Ministers
EPR	Extended Producer Responsibility
ESG	Environmental, Social, and Governance
EU	European Union
EV	Electric Vehicle
F&B	Food and Beverages
FDI	Foreign Direct Investment
FTA	Free Trade Agreement
GDP	Gross Domestic Product
GI	Geographical Indication
GVC	Global Value Chain
HS	Harmonized System
IFRS	International Financial Reporting Standards
IP	Intellectual Property
ISO	International Organization for Standardization
NDC 3.0	Nationally Determined Contribution 3.0
NEDP	National Export Development Plan
NES	National Export Strategy
NSW	National Single Window
OEM	Original Equipment Manufacturer
PoA	Plan of Action
R&D	Research and Development
RVC	Regional Value Chain
SLASSCOM	Sri Lanka Association of Software and Service Companies
SMEs	Small and Medium-Sized Enterprises
TVET	Technical and Vocational Education and Training
UAE	United Arab Emirates
VAT	Value-Added Tax
WCO	World Customs Organization
WTO	World Trade Organization
WTO-TFA	World Trade Organization – Trade Facilitation Agreement

EXECUTIVE SUMMARY

The Government of Sri Lanka has articulated a robust trade development agenda for the country that focuses on expanding and upgrading the export base, integrating firms into both regional value chains (RVCs) and global value chains (GVCs), and leveraging Sri Lanka’s location to build a competitive logistics and services hub for Asia, Europe, Africa, and beyond. Export diversification and economic de-risking are central priorities, for which the NEDP will serve as the main vehicle for implementation over 2026–2030.

Policy priorities are oriented to locking in the current recovery trajectory and shifting the economy towards growth financed by non-debt inflows. In this context, the agenda firmly places exports as the core engine of growth, and ambitious medium-term targets have been set. These include exports anchored at 14–15% of gross domestic product (GDP) by 2030 (Ministry of Finance, Planning and Economic Development, Department of National Planning, 2025, Table 1.4). There is also an ambition to see exports totalling \$36 billion by 2030 (Presidential Media Division, 2025), of which merchandise exports will account for \$28 billion and services-based exports will amount to \$8+ billion. These formidable targets will require significantly higher exports growth rates than current values.

Promising outlook driven by strong comparative advantages

In support of the set ambitions, there are several comparative advantages that can be leveraged for export competitiveness. Colombo Port already functions as a key transshipment node in the Indian Ocean and is being expanded through major public-private investments; while new logistics zones, industrial estates, and multimodal corridors are envisaged to connect ports, airports, and inland production centres. Indeed, trade logistics is both a critical cross-sectoral function and an export earner, with some estimates placing the sector’s contribution at US\$1.7 billion currently, and forecast to grow annually at 15–20%.

At the same time, new manufacturing segments ranging from electrical and electronic components to boatbuilding are emerging, and mainstay sectors such as tea and apparel continue to serve as bulwarks against trade headwinds. Many sectors in which Sri Lanka has export potential are also experiencing rising global demand.

Sri Lanka’s workforce is relatively well-educated and productive. For example, the apparel sector employs over 300,000 people in factories known for high compliance and quality (Export Development Board, 2024), with in-house design and vertically integrated capabilities. Similarly, the IT sector has a large pool of professionals (multilanguage support, digital services) supported by universities and training institutes. On the natural endowment side, Sri Lanka’s famous tea, spices and concentrates, gems, and biodiversity tourism are world-renowned products.

A growing services sector – driven by IT and tourism will support diversification, while Sri Lanka’s spices and concentrates sector will be a key source of competitive advantage, having recently secured its first-ever geographical indication (GI) certification for Ceylon Cinnamon, which will strengthen product differentiation, support premium pricing, and enhance brand recognition in global markets. The spices and concentrates sector is particularly important given the high potential for value addition,

which will yield premium prices in key target markets, as well as the potential to export via e-commerce channels and air transport.

NEDP Strategic Framework

Under the overarching vision of *'Sri Lanka: a competitive logistics and knowledge-intensive export hub, serving regional and global markets'*, the NEDP sets out six mutually reinforcing strategic objectives that provide a coherent framework for reforms and investments.

1. Position Sri Lanka as a regional centre of excellence for logistics and integrated hub operations.
2. Establish a predictable trade facilitation regime that reduces costs and clearance times through simplified tariffs, digitalised Customs, and risk-based controls.
3. Create an enabling trade finance and investment ecosystem that lowers the cost of capital, reduces business frictions, and expands serviced investment space.
4. Build a connected, market-led trade promotion system that catalyses Sri Lankan export growth and diversification in priority markets.
5. Strengthen national frameworks for quality; standards; and environmental, social, and governance (ESG) aspects to underpin sustained export competitiveness.
6. Build a skilled, innovative, and entrepreneur-friendly economy that can generate higher-value, export-oriented growth.

The NEDP applies a growth framework built around two mutually reinforcing levers: horizontal cross-sectoral enablers, and priority sectors (verticals). Deliberate and strong emphasis is placed on cross-sectoral enablers as the primary means of unlocking economy-wide competitiveness gains, enabling export growth across exports sectors with a range of maturity highly mature, emerging, and nascent sectors. The cross-sectoral enablers are:

- **Trade logistics and hub operations**
- **Trade facilitation**
- **Trade finance and business and investment environment reform**
- **Trade promotion and market links**
- **Quality management, standards, and ESG**
- **Skills development, entrepreneurship, and innovation.**

The NEDP priority sectors are:

- **Auto components**
- **Mineral-based industries**
- **Rubber-based industries**
- **Marine-based industries (including boat- and ship-building)**
- **Spices and concentrates**
- **Digital products and services**
- **Electrical and electronic components**
- **Processed food and beverages (F&B).**

The sectors reflect a deliberate balance between established export strengths and emerging growth areas. They span both goods and services, combining higher-technology and knowledge-intensive segments with resource- and commodity-based sectors that offer clear pathways for value addition. Product and value diversification is prioritised, shifting beyond traditional exports into new technology, higher-value manufacturing, and resource-based industries, supported by market development and stronger links to regional and global markets.

Important considerations to ensure sustained export growth

Despite significant potential, there are important considerations. The translation of Sri Lanka's market access and export potential to tangible exports will require concerted and coherent action given the significant structural challenges and externalities faced by the country.

Recent export performance has been driven largely by traditional segments, with growth concentrated in existing products and established markets, and only limited diversification in either product mix or destination profile. The export basket remains highly concentrated, with apparel and tea accounting for more than half of merchandise exports; and market concentration in a small number of destinations heightens vulnerability to external shocks. Participation in both GVCs and RVCs is limited compared with regional peers.

Structural bottlenecks further sharpen the agenda for action. Industrial capabilities have eroded over time, value addition remains limited, and exports are still dominated by labour-intensive, low-technology products. Logistics and quality infrastructure gaps add cost and uncertainty for exporters. Trade finance is a binding constraint, particularly for small and medium-sized enterprises (SMEs): export credit guarantees and insurance cover only a small share of exports relative to international practice, and trade finance remains highly collateral-driven.

Destination diversification is a policy priority. The strategy signals a push to expand into hitherto underexplored markets in Africa, Asia, and the Middle East, while maintaining strength in existing markets. The Association of Southeast Asian Nations (ASEAN) remains a highly relevant, underutilised market in Sri Lanka's neighbourhood, particularly offering significant opportunities for NEDP priority sectors to integrate into RVCs.

Early momentum will be key

An ambitious agenda has been set for the NEDP. Within this broad programme, several priorities merit early and focused attention. Chief among these is the digital transformation of trade facilitation, including full implementation of the National Single Window (NSW) and the end-to-end digitalisation of trade processes. At the same time, deeper regional and global integration is required, with value chains transformed and better aligned to regional and international markets.

Equally important is the need to remove frictions that undermine competitiveness, particularly restrictions and procedural bottlenecks affecting imports that are critical for production and export. Long-standing issues related to value-added tax (VAT) refunds must also be addressed to improve liquidity and predictability for exporters. Finally, the NEDP calls for a deliberate move up the value chain by targeting higher-value industries and embedding Sri Lanka more firmly in the global export ecosystem.

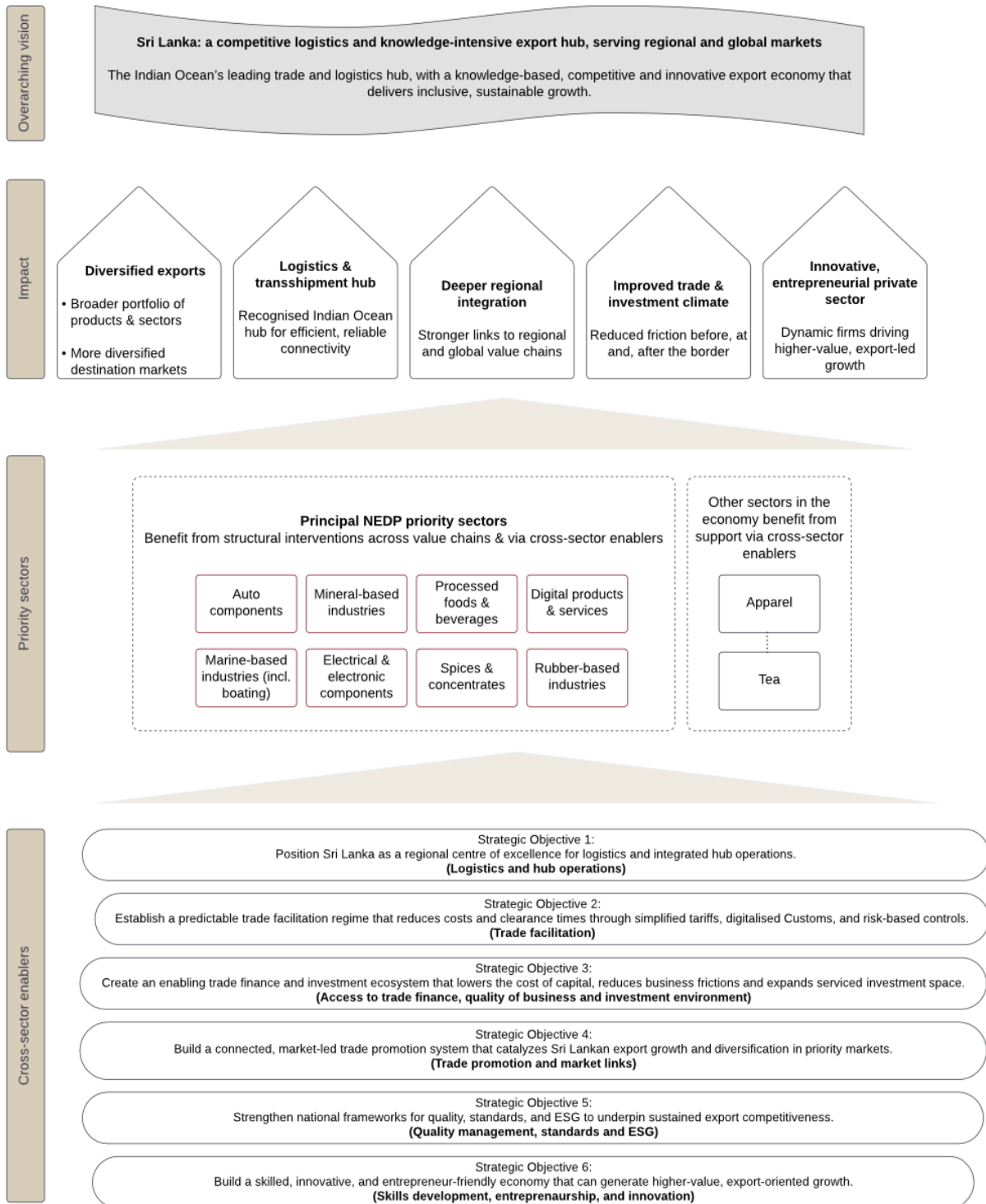
Another area of early implementation will be the establishment and operationalisation of the governance and implementation management structure, which will collectively serve as guardrails for NEDP implementation.

Several NEDP reform priorities are already reflected in Budget 2026, including tariff policy reform through a comprehensive assessment to implement a more transparent tariff structure that supports exporters and investors. Trade facilitation is also prioritised, with the NSW positioned as a flagship reform. In addition, the budget signals a stronger role for economic diplomacy, alongside plans to deepen market access through expanded free trade agreements (FTAs) and engagement in plurilateral trade agreements.

Conclusion

The NEDP is purposefully forward-looking, absorbing lessons learned and transitioning Sri Lanka to a more diverse, innovative, and resilient export-oriented economy. However, the success of the NEDP rests entirely on its implementation. The task ahead demands a whole-of-government and whole-of-nation approach, where the private sector also plays a decisive and continuous role in implementation of the NEDP's Plan of Action (PoA). Coherent implementation will unlock new sectors, deepen integration into regional economies and indeed the global economy and ultimately support more resilient, higher-value growth for Sri Lanka.

Figure 1: NEDP Strategic framework



CHAPTER 1: SETTING THE CONTEXT

Sri Lanka is navigating a challenging global context characterised by shifting trade patterns, rising uncertainty, and intensifying competition. As geopolitical frictions reshape supply chains, competition intensifies, and the manufacturing footprints of traditional leaders such as China are restructured, countries are being compelled to rethink their export strategies and competitive positioning. As an economy seeking to regain stability, strengthen resilience, and unlock new sources of growth, Sri Lanka is confronted with both challenges and strategic openings. A comprehensive understanding of the overarching national trade development agenda and macroeconomic and trade landscape is therefore essential to guide policy priorities.

Box 1: Continuity note from National Export Strategy (2018–2022) to NEDP (2026–2030)

The National Export Strategy (NES) delivered valuable groundwork but could not be fully implemented due to COVID-19 and the subsequent economic downturn. The NEDP is the logical continuation of that agenda. It begins by taking stock of progress since 2018, preserves what worked, and updates priorities where the context has shifted. This is not a verdict on the “success or failure” of the NES; all strategies are time-bound and require a refresh at the end of their horizon.

The NEDP integrates lessons learned from the NES, retains validated sector roadmaps, and maps each NES workstream to an explicit NEDP action, timeline, and accountability. It refreshes targets to reflect rapid changes in global trade (services, digital, sustainability, RVCs) and dynamics within Sri Lanka’s export ecosystem. Stakeholders can expect continuity with clarity: the pipeline is being refined, not discarded, so earlier efforts inform a stronger, delivery-focused plan.

National Trade Development Agenda

The government has articulated a robust trade development agenda for the country, focusing on leveraging Sri Lanka’s strategic location to build a competitive logistics and trade hub, expanding and upgrading the export base, and integrating firms into RVCs and GVCs. This is consistent and aligned with the government’s manifesto, “A Thriving Nation – A Beautiful Life”. It ensures this by prioritising a production-based economy with strong manufacturing, SME-led job creation, a high-value digital services push, and trade-enabling logistics and border modernisation, underpinned by clean and predictable governance.

Policy priorities are oriented towards locking in the current recovery trajectory and shifting the economy towards growth financed by non-debt inflows. In this context, exports lie at the core of the growth strategy, with ambitious medium-term targets: export earnings of \$19 billion in 2025 (News.lk, 2025); exports anchored at 14–15% of GDP by 2030 (Ministry of Finance, Planning and Economic Development, Department of National Planning, 2025, Table 1.4); and exports amounting to \$36 billion by 2030 (Presidential Media Division, 2025).

The agenda is calibrated to global headwinds in particular rising protectionism, including sharp tariff shocks in Sri Lanka’s key markets as well as broader external risks. That context underscores the need for:

- Export diversification (in terms of products, services and destination markets)
- Improving the survivability of export relationships (particularly involving SMEs)
- Reduced friction at and behind the border so exporters can compete on time, cost, and reliability
- Deepening engagements in RVCs
- Resolving structural challenges across various value chains
- Strengthening institutional capacities and coordination
- Crowding in export-oriented investment and technology linked to export opportunities.

Box 2: Orientations of Sri Lanka's Trade Policy Agenda

Sri Lanka was an early proponent of trade liberalisation in South Asia, launching open-market reforms as early as 1977. It remains committed to an outward-oriented trade regime, despite a relatively narrow export base. Total trade (exports + imports) accounted for 42% of GDP in 2024, indicating moderate openness. Overall, Sri Lanka's trade regime is gradually liberalising to make it more open and competitive.

The current policy aims to reignite export growth through greater openness and competitive positioning, with higher exports and foreign direct investment (FDI) as essential pillars for economic stability. Trade liberalisation and regional integration will be critical in achieving this. Accordingly, the 2017 New Trade Policy set a coherent, outward-oriented strategy and introduced a Trade Adjustment Programme to support the private sector as liberalisation proceeds. As an original World Trade Organization (WTO) member, Sri Lanka underscores its commitment to the rules-based multilateral trading system and continued global integration.

The Government of Sri Lanka has adopted a National Tariff Policy, which sets out a tariff-rationalisation agenda aimed at simplifying border taxation and supporting export-led growth. A key implication is the progressive phase-out of para-tariffs that sit on top of Customs duties – notably the Ports and Airports Development Levy, import cess, and the Special Commodity Levy – because these charges raise input costs, add complexity, and weaken competitiveness.

Key agreements

- **Bilateral FTAs:** Sri Lanka currently participates in four bilateral trade agreements. According to official data, preferential imports accounted for a relatively small share (between 0.81% and 2.05% of total imports during 2016–2024). The India–Sri Lanka FTA (2000) and Pakistan–Sri Lanka FTA (2005) provide duty concessions across a wide range of goods. Under the India–Sri Lanka FTA, about 64% of Sri Lankan exports to India use FTA preferences. Sri Lanka also signed a comprehensive FTA with Singapore in 2018 covering goods, services, and investment. The country has also signed an FTA with Thailand.
- **Regional frameworks and preferences:** Sri Lanka is a member of the South Asian Free Trade Area under the South Asian Association for Regional Cooperation, with multiple tariff-cut rounds completed. It is also a participant in the Asia-Pacific Trade Agreement, with concessions exchanged among China, India, and others. Sri Lanka continues to benefit from the European Union (EU) Generalised Scheme of Preferences Plus preferences offered by the EU and Norway, as well as Generalised Scheme of Preferences arrangements with several other trading partners.
- **Ongoing/planned:** Talks are active or under preparation: with China and Thailand; on an Economic and Technology Cooperation Agreement with India focused on services and investment; and on a bilateral FTA with Bangladesh. Sri Lanka has also expressed interest in joining the Regional Comprehensive Economic Partnership. Feasibility work and exploratory discussions have also been undertaken with Malaysia and Indonesia. Negotiations for a Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation FTA are ongoing.

MACROECONOMIC AND TRADE REVIEW

Global trade is experiencing a significant transformation characterised by increased uncertainty and a more rapid growth of services in comparison to goods, presenting new strategic opportunities for Sri Lanka. In recent years, global trade uncertainty has risen¹ to unprecedented levels due to mutual tariff actions by major economies and the increased likelihood of prolonged and retaliatory trade measures (World Bank Group, 2025). At the same time, global services trade grew at a compound annual growth rate of 5.8% from 2010 to 2024, significantly exceeding the merchandise trade growth rate of 3.4% (World Bank, 2024). *Together with China's gradual exit from low-skill manufacturing in sectors such as apparel, leather, textiles, and footwear (United Nations Trade and Development), these trends underscore the need for Sri Lanka to prioritise services sector reforms while selectively upgrading its manufacturing base to capture emerging value-chain opportunities.*

Sri Lanka's trade portfolio continues to exhibit significant imbalances and lacks diversification in its product range. By 2024, the nation's total exports reached about \$12.7 billion (Central Bank of Sri Lanka, 2025), indicating slight growth. Furthermore, the country experienced a persistent trade deficit from 2015 to 2024, totalling roughly \$6.5 billion in 2024, while export growth was stagnant at approximately 1.58% annually during the same period (see Figure 2). Additionally, the export portfolio remains highly concentrated, with apparel and tea making up around 56% of exports between 2015 and 2024 (see Figure 3). *Moving forward, Sri Lanka will prioritise diversifying its exports and enhancing value addition to mitigate external imbalances and bolster resilience, particularly by expanding beyond traditional sectors like apparel and tea, and encouraging the development of higher-technology industries.*

Sri Lanka's involvement in global trade is still hindered by limited market access and poor integration into GVCs and RVCs. In 2022, the country's trade related to GVCs made up merely 35.27% of total trade, which is considerably lower than that of its regional counterparts² (see Figures 4 and 5). Additionally, Sri Lanka's export markets are quite concentrated, with the US, UK, and India collectively accounting for 40% of its export destinations. This is further exacerbated by a significant dependence on import sources like China and India, which together represent 42% of Sri Lanka's total imports. ASEAN has emerged as a dynamic and rapidly evolving economic hub, underpinned by deep regional integration and resilience to external shocks (including the COVID-19 pandemic), making it a compelling platform for Sri Lanka to deepen integration into RVCs. *These trends underscore the necessity for enhanced integration into GVCs and RVCs achieved through improved trade connectivity and compliance with higher standards while also diversifying export markets and supply sources.*

Sri Lanka's recent export growth has been narrowly based, relying largely on existing products sold to established markets rather than expansion into new products or destinations. Between 2020 and 2024, export growth was driven primarily by incumbent products in traditional markets, while contributions from new products and new markets remained limited (see Figure 6). *This highlights the*

¹ Trade uncertainty has reached record highs, with the Trade Policy Uncertainty index exceeding 1,000, driven by US reciprocal tariffs and concerns over enforcement and retaliation in the global market.

² World Integrated Trade Solution Database, using Asian Development Bank as the source for GVC indicators (2022).

need to broaden the product and market scope to ensure sustainable export growth in the medium to long term, supported by targeted value chain interventions and dedicated trade promotion efforts.

The survivability of export relationships, measured by export duration,³ is an important indicator of economic maturity and offers insight into Sri Lanka's capacity to sustain participation in international markets. In Sri Lanka's case, of the 249 export relationships established in 2020, only 113 (45.4%) survived into 2021, falling further to 87 (34.9%) in 2022, before a partial recovery to 106 (42.6%) in 2023 and 104 (41.8%) in 2024 ([World Integrated Trade Solution](#)). This decline may be driven by factors such as global demand fluctuations, competition from other exporters, and capacity constraints in key sectors. *This indicates that strengthening exporter capacity, addressing input and supply-side constraints, and improving the overall business environment are essential to enhancing the long-term survivability of Sri Lanka's export relationships.*

Sri Lanka's services trade has staged a moderate recovery since 2022, led by tourism and transport services, though growth remains uneven across subsectors. From 2022 to 2024, total services exports increased by approximately 50%, indicating a rebound from the lows experienced during the pandemic. Tourism inflows continued to be the largest contributor, making up 45.9% of total services exports in 2024, followed by transport services at 26% and IT-business process management (BPM)⁴ at 14.1%. *This concentration highlights the need to diversify services exports beyond traditional segments by developing higher-growth areas such as digital, professional, logistics, and other modern services to strengthen resilience and sustain long-term growth.*

Sri Lanka's FDI performance has weakened since 2018, constraining technology transfer and productivity growth, despite FDI's critical role in supporting export-oriented growth. The FDI-to-GDP ratio decreased from 1.7% in 2018 to 0.6% in 2024. FDI-linked exports, which contribute more than 30% of total merchandise exports, rose only marginally from US \$4 billion in 2015 to \$4.8 billion in 2023, reflecting limited expansion in FDI-driven export capacity (see Figures 7 and 8). The NEDP will also work to strengthen the links between investment, value-chain structural improvements, FDI, and industrialisation. *The rise in FDI inflows exceeding \$1 billion in 2025, as indicated by the Sri Lanka Board of Investment (BOI) (News.lk. 2026), suggests a potential recovery; however, maintaining this upward trend will necessitate redirecting investment towards export-oriented and technology-intensive sectors through streamlined regulations and investor support.*

Sri Lanka's ability to compete in exports is hampered by weaknesses in manufacturing capabilities, logistics, and access to financing. The country's manufacturing capacity has diminished, with the industrialisation intensity index falling by almost 28% from 2013 to 2022. Further challenges to competitiveness arise from deficiencies in logistics and quality infrastructure, as evidenced by Sri Lanka's 2023 rankings of 73 on the Logistics Performance Index and 65 on the Global Quality Infrastructure Index. Access to finance for exporters, particularly SMEs, remains limited, with Sri Lanka's export credit guarantee/insurance covering only 2–4% of exports, well below the international average of 10–12%. *These challenges highlight the necessity for coordinated reforms aimed at*

³ Export duration reports the number of new product-partner relationships with trade values of at least \$10,000 in the start year, and the number and percentage of those that survive in each succeeding year until the selected end date. The ability to maintain trade relationships is a sign of a well-developed economy. Large-scale deaths of trading relationships may reflect economic shocks or be the result of new policies.

⁴ Telecommunication, computer, and information services.

restoring industrial capacity, enhancing technology intensity, and improving logistics and financial support systems to facilitate higher-value exports.

Figure 2: Sri Lanka’s trade balance, 2015–2024
(\$ billion)

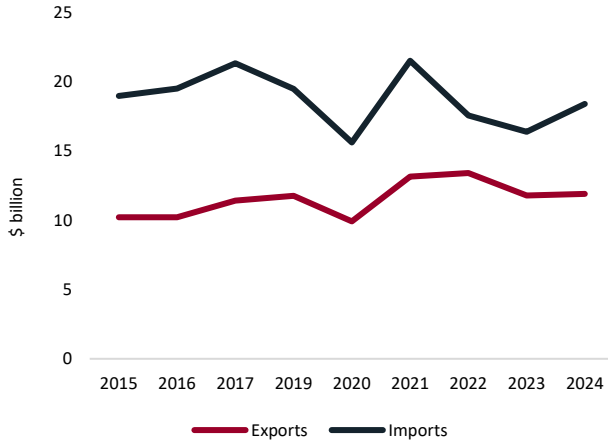


Figure 3: Share of top five exported merchandise products, 2015–2024

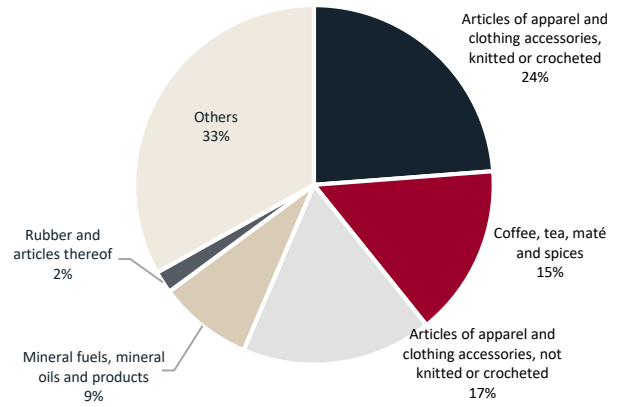


Figure 4: Sri Lanka’s GVC-related trade (as a percentage of gross trade), 2010–2022

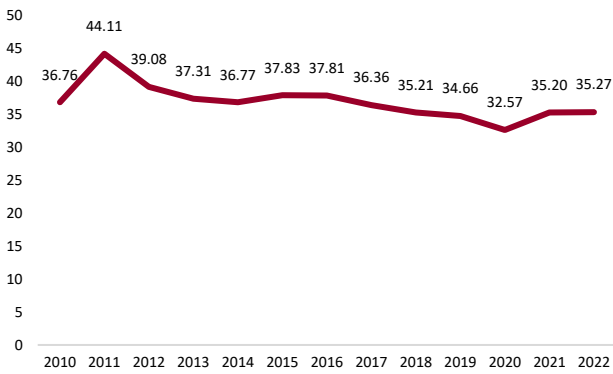


Figure 5: Regional comparison: GVC-related trade as a percentage of gross trade, 2022

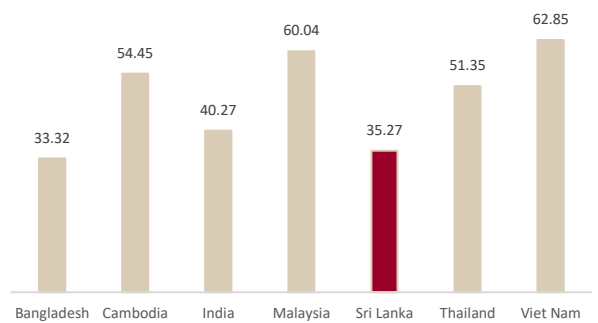


Figure 6: Decomposition of export growth between 2020 and 2024

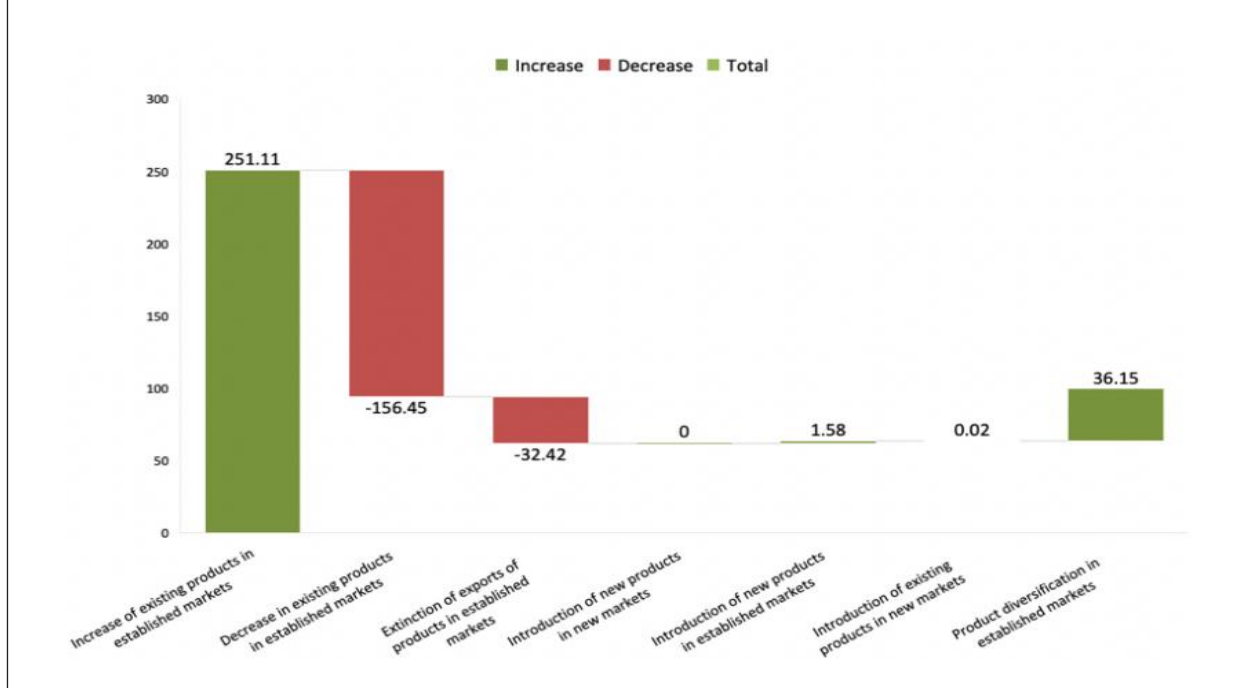


Figure 7: Total FDI inflow into Sri Lanka and FDI inflow as a share of GDP, 2015–2024
(\$ billion)

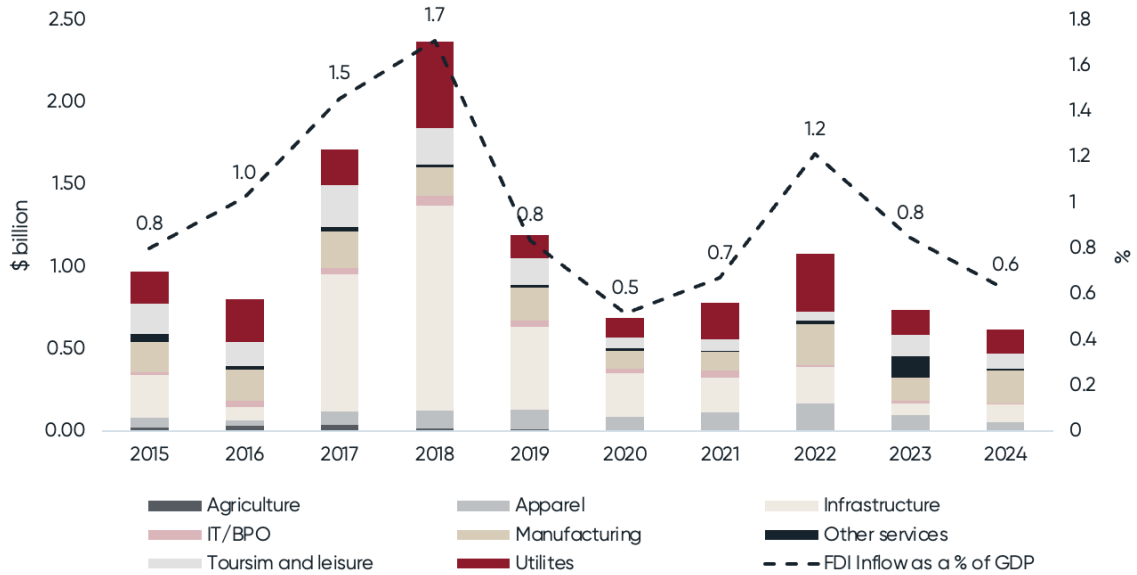
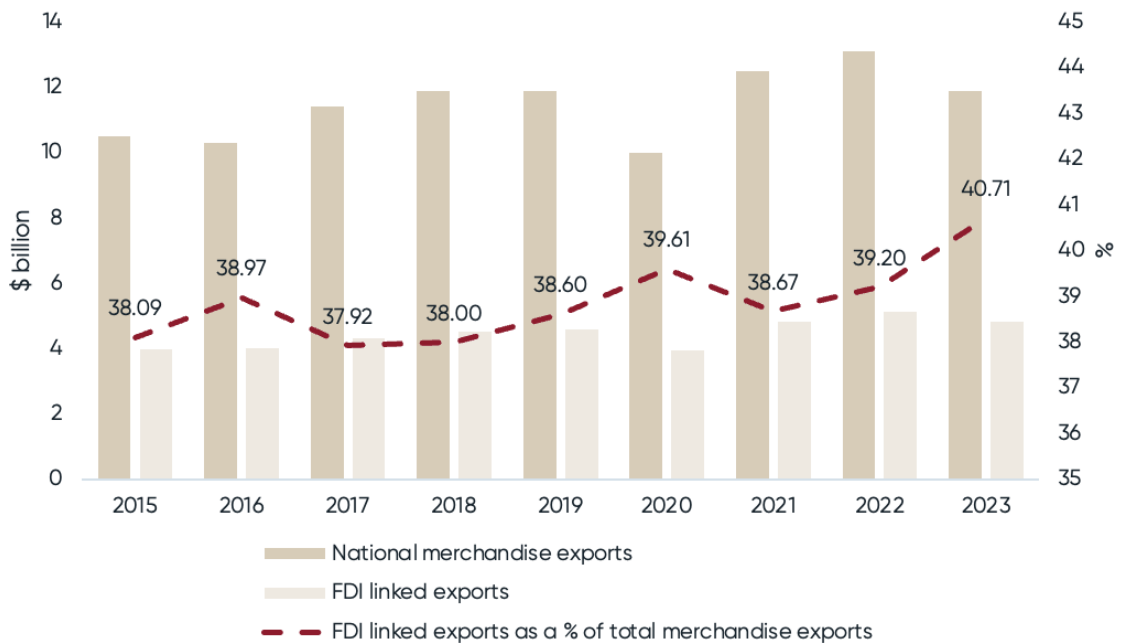


Figure 8: Share of FDI-linked exports to total merchandise exports, 2015–2023
(\$ billion)



CHAPTER 2: NEDP STRATEGIC FRAMEWORK

The NEDP's strategic framework provides a clear roadmap for Sri Lanka's trade ecosystem, aligning it around shared objectives and guiding the efficient use of resources. It supports systematic monitoring and evaluation of initiatives, and helps to identify emerging challenges and opportunities, including in the digital space. This, in turn, allows the Plan to be adjusted in an agile and evidence-based manner as conditions evolve.

Vision

The overarching vision for the Sri Lanka's NEDP has been articulated as:

Sri Lanka: a competitive logistics and knowledge-intensive export hub, serving regional and global markets

By 2030, Sri Lanka will be the Indian Ocean's leading trade and logistics hub, with a knowledge-based, competitive, and innovative export economy that delivers inclusive, sustainable growth.

Strategic Objectives

Strategic Objective 1: Position Sri Lanka as a regional centre of excellence for logistics and integrated hub operations.

The government will position Sri Lanka as the Indian Ocean's premier multimodal logistics and distribution hub. This builds on the country's location on the East–West shipping lanes. Integrated connectivity is a parallel ambition. Sea, air, road, and rail will operate as a single network that serves regional and global supply chains.

Logistics is a core enabler of export growth, investment, and jobs in Sri Lanka. The sector currently contributes about 2.5% of GDP and supports employment for 40,000 to 50,000 people. Stronger logistics will lift competitiveness and help the country meet other targets, including export diversification and expanded value addition.

Colombo Port remains a key transshipment hub in the Indian Ocean. It handled more than 4 million twenty-foot equivalent units in the first half of 2025 and is on track to exceed 8 million for the year. Congestion persists due to operational bottlenecks, landside constraints, and coordination issues that slow yard and gate movements.

A major expansion programme is under way. The Colombo West International Terminal, led by the Adani Group, is at an advanced stage and will add a fully automated deep-water terminal with a capacity of more than 3 million twenty-foot equivalent units a year. Phase two of the East Container Terminal is expected to be fully completed by 2030. Preparatory work has begun for phase two of the West Container Terminal. These developments are progressing through public-private partnerships.

Trade logistics reforms will first consolidate Colombo's position as the principal transshipment hub in the Indian Ocean. Additional berth and yard capacity, together with modern handling equipment and better cargo consolidation facilities, will allow the port to receive larger vessels more frequently and to turn them around faster. As performance improves, Colombo will become a more attractive call for mainline and feeder operators, which in turn will draw in related maritime and logistics services, and stimulate private investment around the port system. This agenda will be matched by service upgrades that raise competitiveness. Ports will scale value-adding services such as packaging, labelling, cold-chain logistics, and quality control inspections to speed flows and support exporters. The government will invest in green logistics solutions to cut emissions and operating costs across the maritime logistics chain. Strategic investments in port ancillary services will attract more global shipping lines and reinforce Sri Lanka's position as a key maritime hub.

A multi-node maritime system that lifts national logistics capacity and anchors industrial growth is envisaged. The following ports and associated activities have been recognised as priority focus areas for future development. Hambantota is designated to receive investments to establish a shipping-related industrial zone focused on shipbuilding and repair, liquid petroleum gas distribution, and integrated warehousing. Kankesanthurai is envisaged to expand dry-bulk handling and operate as a regional commercial port that supports the Northern Province. National priorities also include the Colombo North Port Development Project and the Trincomalee-based industrial estate to add deep-water capacity and service industrial demand (Ministry of Finance, Planning and Economic Development, Department of National Planning, 2025).

These investments will be matched by improvements behind the gate so that cargo can move through the system in a predictable way. Stronger road and rail links to inland depots, the early operationalisation of the Veyangoda inland container depot, and the use of risk-based screening and streamlined gate processes will reduce congestion around Colombo and shorten clearance times. As a result, exporters and carriers will benefit from lower dwell times and more reliable end-to-end corridors connecting ports, airports, industrial zones, and inland distribution centres.

The logistics agenda will also raise the quality and inclusiveness of services. New BOI-backed logistics zones, plug-and-play and temperature-controlled warehousing, and overseas fulfilment options will make it easier for firms, including SMEs, to meet buyer requirements and scale in priority markets. Pilots on solar-powered warehouses and cleaner port-to-inland container depot transport will lower operating costs and align the sector with emerging environmental standards. A clear performance framework and institutionalised public-private dialogue will keep all actors focused on results and on continuous improvement.

Strategic Objective 2: Establish a predictable trade facilitation regime that reduces costs and clearance times through simplified tariffs, digitalised Customs, and risk-based controls.

The Government of Sri Lanka has identified trade facilitation as a key reform area that will unlock export competitiveness for all export sectors. Comprehensive digitalisation, legal and regulatory reform, institutionalised public-private collaboration, and transparency are critical themes within this agenda.

Sri Lanka will anchor competitiveness on predictable, low-friction border processes because most exporting goods sectors, ranging from coconuts to apparel to electronics, have experienced significant challenges in importing products, which in turn impacts exports. A National Tariff Policy will establish a simple, transparent, and predictable framework that lowers the cost of production inputs and improves access to affordable, high-quality raw materials. Clear publication of rates and rules will reduce the compliance burden and support pricing certainty for exporters and manufacturers.

A trade NSW will automate and integrate border agencies and exporter registrations, so data is submitted once and reused throughout the clearance chain. This platform will be complemented by a port community system, truck appointment system, port automation, and dedicated Customs inspection yards. Together they will cut queues, eliminate duplicate checks, and provide end-to-end visibility from manifest to release.

Legal modernisation will lock in efficiency and predictability. A new Customs Law will codify risk-based procedures, electronic records, and clear service standards that speed decisions and strengthen revenue assurance. Advance rulings on classification, origin, and valuation will be expanded and automated to encourage wider use by SMEs and to reduce disputes before shipment. The Authorised Economic Operator (AEO) programme will be revamped to reward compliant traders with expedited lanes and fewer interventions, with targeted support to help smaller firms qualify.

Real-time operations will be strengthened by electronic cargo tracking from port to inspection yards. This will improve transparency, reduce leakages, and shorten dwell time by coordinating inspections and minimising re-handling. A new time release study will benchmark current performance and guide targeted reforms, allowing agencies to focus on the most binding delays and to track gains in clearance time and reliability.

Strategic Objective 3: Create an enabling trade finance and investment ecosystem that lowers the cost of capital, reduces business frictions and expands serviced investment space.

Challenges in the trade finance area stem from structural weaknesses in the financial system, risk aversion, information gaps, low SME financial literacy, inadequate data for credit assessment, high costs, and a lack of policy coordination and consistent support mechanisms.

Sri Lanka has a clear opportunity to shift from a high-cost, collateral-driven financing environment to one where risk is assessed more systematically and SMEs can access a broader mix of instruments. As interest rates stabilise, reforms will focus on deepening the use of credit bureaus and scoring; expanding export credit guarantees and insurance; and promoting supply-chain finance, factoring, and dedicated export finance windows. This will gradually reduce the reliance on collateral, improve risk pricing, and make working capital more affordable for established and emerging exporters.

At the same time, financial literacy and awareness of support schemes can be significantly strengthened. The government, regulators, and banks will work to ensure that export finance programmes, guarantee schemes, and new digital platforms are clearly explained, actively promoted, and accessible in Sinhala and Tamil, with clear contact points. Over time, this will allow a much larger share of start-ups, small exporters, and firms outside major cities to benefit from instruments that are already available but currently underused.

The fiscal and regulatory framework will also be made more predictable and supportive of investment. Efforts to streamline VAT refund processes, clarify incentive regimes, and provide greater policy continuity are expected to ease cash-flow pressures and strengthen confidence in formal operations. In parallel, access to serviced industrial land and the ease of doing business will be improved through the expansion and better allocation of zones, together with more efficient, digitally enabled licensing and registration processes. Collectively, these reforms will move Sri Lanka towards a more competitive, stable, and investment-ready export environment.

Strategic Objective 4: Build a connected, market-led trade promotion system that catalyses Sri Lankan export growth and diversification in priority markets.

Trade promotion and market links are critical areas for export competitiveness, because ultimately all export growth is driven back from the markets. The NEDP will therefore focus on building stronger, more direct connections between Sri Lankan firms and priority markets, while enabling SMEs to move beyond dependence on a narrow set of buyers and intermediaries.

First, the NEDP will strengthen firm-level capacities for branding, market development, and use of digital channels, with particular emphasis on SMEs. This will include better access to market intelligence; advisory services; and training on standards, packaging, e-commerce, and buyer engagement.

Second, trade promotion efforts will be progressively rebalanced from a predominantly Colombo-centric model to a more geographically inclusive approach. Regional chambers and associations will be supported and more systematically linked into national programmes, ensuring exporters across the country can participate in training, missions, and buyer-link initiatives.

Third, the NEDP will promote a more coherent national and sector branding framework, aligning messages and campaigns across agencies and industries to project a consistent image of quality, reliability, and sustainability.

Fourth, coordination across export-promotion actors will be strengthened. The Export Development Board (EDB), the Department of Commerce, investment and tourism agencies, sector boards, and overseas posts will work within shared planning, market-priority, and performance frameworks, including better use of missions and honorary consuls for trade promotion.

Finally, the NEDP will seek to deepen and expand market access through FTAs and other trade agreements, while making export incentive schemes more predictable, transparent and accessible. Together, these measures aim to create a more connected, market-driven ecosystem that helps Sri Lankan exporters identify, enter, and grow in high-potential markets.

Strategic Objective 5: Strengthen national frameworks for quality, standards and ESG to underpin sustained export competitiveness.

Trade-related quality management, standards, accreditation, and sustainability will become central levers of export competitiveness. Once the current gaps are addressed, exporters, including SMEs, will operate within a coherent national quality and ESG framework that is aligned with international norms and underpinned by capable institutions, predictable incentives, and accessible services. This will allow Sri Lankan products to meet demanding market requirements more efficiently, reduce compliance costs, and position the country as a reliable, sustainable sourcing location.

The strategic thrust on quality and standards will focus on modernising and fully operationalising the national quality infrastructure. This includes updating the policy and legal framework; activating the National Quality Council; and strengthening coordination among standards, accreditation, and market-surveillance bodies. Investments in institutional capacity, conformity assessment bodies (for example, laboratories, inspection bodies, certification bodies, etc.), and accreditation bodies will be prioritised, alongside the development of visible, affordable conformity assessment and advisory services. Greater emphasis will be placed on improving SME awareness and better leveraging existing multilateral recognition of the Sri Lanka Accreditation Board under International Laboratory Accreditation Cooperation and the International Accreditation Forum, so that domestic conformity assessment results are accepted in export markets, reducing retesting, compliance costs, and time to market for exporters.

The strategic thrust on sustainability and ESG will aim to establish an integrated national framework that connects export development with climate and sustainability commitments, including the Nationally Determined Contribution (NDC) 3.0 targets. The NEDP will support the development of clear legal and policy instruments for ESG and due diligence; strengthen institutional capacities to interpret and communicate emerging global rules (such as the EU Deforestation Regulation and International Financial Reporting Standards (IFRS) Sustainability Disclosure Standards (S1/S2)); and provide structured guidance to firms. Measures will promote access to green and sustainability-linked finance; rationalise and harmonise certification and auditing requirements; and encourage circular economy business models by reforming tax and regulatory disincentives. Together, these strategic thrusts seek to ensure that compliance with quality, environmental, and social standards becomes a source of competitive advantage rather than a barrier to market access.

Strategic Objective 6: Build a skilled, innovative, and entrepreneur-friendly economy that can generate higher-value, export-oriented growth.

Under the NEDP, Sri Lanka will seek to progressively realign its skills system with labour-market and export needs, so that workers at all levels are equipped for higher-productivity, trade-related opportunities. This will include modernising technical and vocational education and training (TVET) curricula and accreditation; strengthening coordination between providers, policymakers, and industry; and improving trust in qualifications. The NEDP will also aim to enhance English and other export-relevant competencies across value chains, so that firms can interact more effectively with international buyers and comply with complex market requirements.

In parallel, the NEDP will aim to foster a more coherent and inclusive entrepreneurship ecosystem. Efforts will focus on simplifying and better signposting the institutional landscape; improving access to information, advisory services, and support schemes; and extending start-up and SME support

beyond the Western Province. By improving the overall business environment and strengthening links between SME support, skills, and export promotion, the NEDP will encourage more firms to start, formalise, and scale in export-oriented activities.

Finally, the NEDP will seek to develop a more dynamic innovation and intellectual property (IP) system that supports technology upgrading and commercialisation. This will involve encouraging stronger university-industry collaboration; facilitating early-stage and risk capital for innovation-driven firms; and progressively modernising IP policy, institutional capacities, and digital services. In doing so, the NEDP aims to increase the protection, use, and commercialisation of Sri Lankan ideas and technologies, reinforcing the country's competitive position in regional and global markets.

CATALYSING THE SHIFT

Sri Lanka's economy is on the path to recovery. However, a shift in the growth model is needed to meet the ambitious targets set by the government. Most growth has taken place along intensive margins (existing products to existing markets) via sectors such as apparel and tea. However, increasing competition in Sri Lanka, and externalities such as tariffs, mean that growth via traditional sectors is no longer guaranteed or sufficient.

1. Coordinated interventions at the nexus of industrialisation, investments, and structural enhancements within export value chains, leading to enhanced export competitiveness.

Industrialisation without investment remains shallow, investment without value-chain reforms leaks competitiveness, and value-chain adjustments without an industrial base have limited impact. Sustainable export competitiveness emerges when all three move together. The NEDP therefore adopts a strong concurrent focus on the three areas.

Industrialisation starting with endorsement and implementation of the National Policy for Industrial Development of Sri Lanka (Ministry of Industries, 2025) will deepen Sri Lanka's industry base, shifting production from raw and semi-processed exports to higher-value, technology-intensive goods; and strengthening the readiness of NEDP priority sectors to support diversification. This will require better alignment of FDI with the needs of priority export sectors to provide the capital, technology, and know-how required to modernise these sectors. At the same time, structural enhancements along export value chains are essential to improve sector coordination and implement reforms at key entry points in the chain.

2. Youth and women entrepreneurship will be priority levers for inclusive export-led growth.

SMEs are the backbone of the economy and are considered strategic priorities for youth and women entrepreneurship (Ministry of Industry and Entrepreneurship Development, 2025). Sri Lanka's SME base is central to recovery and export diversification, but youth and women entrepreneurs remain under-represented and face persistent constraints.⁵ Women's ownership in the SME sector is low:

⁵ According to the Department of Census and Statistics, Sri Lanka's Labour Force Survey 2024, the overall labour-force participation rate is 47.8%, with male participation at 68.1% and female participation at just 30.0% (Department of Census and Statistics, 2024).

although SMEs contribute about 52% of Sri Lanka's GDP, only 25% of entrepreneurs are women in the SME sector (Skills Development Centre Sri Lanka, 2023).

Government schemes and programmes targeting SMEs, youth and women entrepreneurship

- Enterprise Sri Lanka: A flagship SME support framework offering concessional credit, technical assistance, and a one-stop support model at divisional level. Its design explicitly targets young entrepreneurs and SMEs to overcome finance, collateral, and information barriers (Department of Development Finance, n.d.).
- The National Enterprise Development Authority runs targeted Youth Entrepreneurship Skill Development programmes (including training for vocational students) to convert vocational skills into viable micro and small enterprises.
- The Ministry of Industry and Entrepreneurship Development launched a national young entrepreneur development programme, and targeted capacity-building and market-link activities for women entrepreneurs (training, exposure visits, and selective support to access export value chains) (Ministry of Industry and Entrepreneurship Development, 2026).
- Central Bank of Sri Lanka financial sector measures: The Bank has issued SME relief and revival measures (2024–2025), and monitoring of SME lending. These support packages aim to stabilise credit flows to micro and small firms, including women-owned enterprises (Central Bank of Sri Lanka, 2024).

As a result of these measures, training, digital uptake, and targeted exposure activities have increased business know-how for participating women and youth groups. NEDP implementation will now focus on supporting these initiatives in improved formalisation, scaling up to export markets and shifting from one-off trainings to integrated finance-plus-market interventions (Ministry of Industry and Entrepreneurship Development, 2025), which has been identified as an important requirement for such initiatives.

3. Deepened and expanded FTAs and regional trade agreements will facilitate market access for NEDP priority sectors.

The current export landscape in Sri Lanka is constrained by limited access to key international markets, largely due to an inadequate portfolio of FTAs and regional trade partnerships. FTA engagement has not kept pace with peer economies and emerging topics relevant to trade. Existing agreements provide a useful foundation, but their scope and depth are limited, particularly with respect to sector-specific annexes and newer disciplines such as e-commerce, services, and sustainability. Without timely upgrades and new agreements, Sri Lankan firms risk incremental preference erosion and fewer opportunities to integrate into RVCs.

Sri Lanka is not a full participant in major trade councils or blocs, such as the Regional Comprehensive Economic Partnership, which has restricted the country's ability to tap into high-growth markets and benefit from the network effects of regional supply chains.

This exclusion places Sri Lankan exporters at a disadvantage. While regional peers leverage their FTA networks to reduce tariffs, access new markets, and integrate into GVCs, Sri Lankan businesses – especially SMEs – must contend with higher trade barriers, reduced competitiveness, and missed opportunities.

Going forward, the government will pursue a more proactive FTA and regional trade agenda to secure and deepen access in key markets, including India, China, and ASEAN. This effort will prioritise sector-specific annexes that directly support NEDP priority sectors, and will systematically integrate emerging areas such as e-commerce, circular economy, and ESG frameworks.

Therefore, the case for strengthening Sri Lanka's FTA network is clear:

- **Improved market access:** Expanded FTAs reduce tariff and non-tariff barriers, allowing Sri Lankan products to compete on a level playing field in overseas markets.
- **Integration with regional supply chains:** Joining major trade blocs facilitates participation in complex value chains, enabling exporters to move beyond just finished goods into components and services.
- **SME empowerment:** Reduced trade barriers open new opportunities for SMEs, which are often most disadvantaged by lack of access.
- **Alignment with investment and innovation:** A robust FTA network makes Sri Lanka more attractive for foreign investors, particularly in manufacturing and technology transfer.
- **Policy readiness:** Ensuring a future-ready negotiation approach, emphasising that Sri Lanka's trade negotiators must prepare to secure agreements that reflect evolving commercial and technological realities.

4. Reduced "friction" before, at, and after the border.

The NEDP will place strong emphasis on improving both the overall business environment and the trade facilitation regime that exporters face. On the trade facilitation side, the NEDP supports ongoing reforms in terms of Customs modernisation and digitalisation of trade processes via the NSW for trade, among other areas. Overall, the NEDP supports the development of a predictable trade facilitation regime that reduces costs and clearance times through simplified tariffs, digitalised Customs, and risk-based controls.

On the business climate side, this includes advocating for reforms that support development of the import-process-export model for NEDP priority sectors, particularly those dependent on raw material imports (including plantation crops, spices, and mineral-based sectors, among others), and supporting ongoing reforms in areas such as VAT and formalisation. These efforts will be closely linked to ongoing SME development and investment promotion reform agendas, particularly licensing simplification and related regulatory streamlining.

Together, these measures aim to reduce procedural and regulatory frictions before and at the border, lowering transaction costs and clearance times for NEDP priority sectors.

5. Exports growth will occur on both extensive and intensive margins.

The NEDP will prioritise product diversification (new products into existing markets) and market diversification (existing products into new markets), while also supporting the deepening of existing trade relationships (existing products into existing markets). Tailored support packages will be designed, based on comprehensive value-chain analysis for the priority sectors. These packages will combine trade promotion, supply chain and logistics support, factory and infrastructure upgrading, standards and certification assistance, as well as access to appropriate finance and risk-mitigation instruments.

For market penetration efforts, exporters will benefit from strengthened market intelligence, targeted export promotion, and in-market handholding. This can include support for participation in trade fairs and buyer missions; business-to-business (B2B) matchmaking; in-market representation and aftercare; joint branding and storytelling initiatives; and practical guidance on meeting regulatory and sustainability requirements in destination markets. The services sector will also be a critical driver of growth on both margins, given regional and global demand trends in areas such as IT-BPM, logistics, professional services, and tourism-related offerings. Together, these measures will enable Sri Lankan firms to both deepen their presence in established markets and break into new, higher-value segments and destinations.

6. *Digital products and services as a strategic growth engine.*

Sri Lanka's services sectors – notably IT-BPM and tourism – have shown strong growth potential even amid the global slowdown. Within this, the digital products and services sector has begun to diversify beyond traditional IT-BPM, at a time when international brands continue to outsource IT, finance, engineering, and other knowledge-intensive functions. This positions Sri Lanka's digital products and services sector as a strategic engine for export growth.

This potential is underpinned by a young, skilled, and English-speaking workforce; competitive operating costs; and a favourable time zone for serving Europe, the Middle East, and parts of Asia. With targeted support on skills, digital infrastructure, and market access, the sector can drive higher-value services exports and help reposition Sri Lanka within services RVCs and GVCs.

7. *Strengthened institutions and coordination for NEDP implementation*

Institutional capacity development under the NEDP will concentrate on core institutions that really shape export performance. In practical terms, this means strengthening the EDB and the NEDP secretariat so they can steer implementation, generate and share market intelligence, and track results in a disciplined way. Quality and standards bodies such as the Sri Lanka Standards Institution, Sri Lanka Accreditation Board, and key laboratories need predictable, multi-year support to upgrade staff skills, equipment, digital systems, and accreditation, so that services are timely and relevant for priority sectors. Capacity is also needed to deal with ESG, due diligence, and climate-related export requirements; and in the skills and innovation system – for example, through better TVET accreditation, trainer upgrading, and more effective IP administration.

On coordination, the aim is to move from a set of parallel initiatives to a more joined-up export system. EDB, the Department of Commerce, investment and tourism agencies, sector boards, and overseas missions will work to common market priorities and planning frameworks, backed by a shared market intelligence set-up rather than fragmented efforts. Standards, accreditation, and market-surveillance agencies will coordinate through a functioning National Quality Council and updated national quality infrastructure arrangements. Such coordination will directly improve the international acceptance of Sri Lankan conformity assessment results, particularly in export markets. New coordination platforms will bring together industry, TVET, and universities on skills; link climate and export agendas; and streamline SME support, so firms see a more coherent offer from the state.

8. *Public-private dialogue mechanisms in Sri Lanka*

Sri Lanka has been gradually strengthening its public-private dialogue architecture. There is a shift towards more inclusive, sector-specific, and mixed-stakeholder dialogue formats, reflecting an

acknowledgement that business-ready policy requires both public and private sector inputs. Dialogues are more frequent, thematic, and inclusive; institutional recommendations have emerged; and engagement with business, donors, and government is improving.

However, while the number of public-private dialogue platforms is growing and becoming more diversified (agriculture, taxation, climate-smart investment), challenges remain around ensuring private-sector voices (especially SMEs) are systematically represented; staffing and institutional continuity of forums; and translating dialogue outcomes into concrete policy reforms and investment flows.

NEDP implementation will ensure that public-private dialogue mechanisms are embedded into regular policy cycles, ensure feedback loops between dialogue and decision-making, and broaden the participation of non-traditional private-sector actors.

9. E-commerce will emerge as a conduit of trade-led growth and integration in RVCs

The NEDP will support a shift from a predominantly offline model to one where e-commerce and digital trade become mainstream channels for reaching domestic, regional, and global markets. The NEDP will advocate for the development of a national e-commerce strategy, followed by development of the e-commerce ecosystem in the country, focusing on regulatory, logistics, and capacity-building aspects.

Digital trade provides a low-cost, high-impact mechanism for connecting Sri Lankan firms to regional production networks. Platforms such as ThaiTrade.com, Alibaba, Vietrade, IndiaMart and other ASEAN B2B marketplaces have successfully facilitated regional sourcing and supplier links, enabling SMEs to access buyers, certification services, and logistics digitally. This makes digital trade reform a key enabler for Sri Lanka's RVC participation.

Targeted programmes will build the digital capabilities of SMEs and export support institutions, including skills in digital marketing, platform management, data analytics, and online customer engagement. Over time, this will allow Sri Lankan exporters to combine traditional channels with digital routes to market, expanding reach and resilience while meeting the expectations of increasingly digital buyers.

10. Sustainability as a competitive edge for Sri Lanka's exports

Under the NEDP, sustainability will be repositioned as a source of competitive advantage and product differentiation for Sri Lanka. This will involve aligning tax and regulatory frameworks to reward waste reuse and recycling; easing well-regulated imports of secondary materials needed by local recyclers; integrating data systems across agencies to enable traceability and extended producer responsibility (EPR); and developing targeted incentives for circular business models in priority sectors. By doing so, Sri Lanka can respond to evolving buyer and regulatory requirements; signal strong ESG performance; and position its exports as "low footprint", responsible choices in global markets.

11. Governance and implementation arrangements for the NEDP

Proper governance and implementation of the NEDP will be ensured through clear institutional anchoring, dedicated coordination structures, and robust monitoring systems. The Plan will be formally embedded within the government's trade and export development agenda, with the

Economic Development Council of Ministers (EDCM) acting as a high-level steering committee, providing strategic oversight, resolving cross-ministerial bottlenecks, and endorsing major policy directions. A permanent NEDP Technical Committee will translate this guidance into action by coordinating across line ministries, agencies, the private sector, and development partners; preparing issues for EDCM decision; and overseeing implementation of the PoA.

A dedicated NEDP secretariat, housed within the EDB, will support day-to-day coordination, work planning, reporting, and follow-up. Implementation will be underpinned by annual workplans, a concise results framework, and a web-based monitoring and evaluation tool that enables accountable entities to update progress, generate reports, and use dashboards for real-time tracking and course correction. Resource mobilisation will be guided through alignment with the national budget, public investment programmes, and development partner support; while governance will be grounded in principles of national ownership, private-sector-driven priorities, whole-of-government coordination, inclusiveness, and transparency.

NEDP PRIORITY SECTORS

The priority sectors selected for the NEDP 2026 - 2030 are based on the foundations of NES 2018 - 2022, while reflecting changes in global trade dynamics and local capabilities, and implementation lessons. Five priority sectors identified in the previous NES electrical and electronic components, processed F&B, spices and concentrates, the boating industry, and IT-BPM have been retained and repositioned under the NEDP due to their ongoing relevance, export readiness, and potential for value addition and GVC integration. At the same time, the NEDP introduces three new priority sectors – auto components, minerals-based industries, and rubber to capitalise on increasing regional and global possibilities, and support industrial transformation.

Established and mature export sectors such as apparel, tea, and tourism, which already benefit from dedicated institutional frameworks and policy support will be strengthened further by the NEDP's cross-sector enablers, which include trade facilitation and logistics, trade finance and business environment, trade promotion and market links, quality, standards and sustainability, and skills and entrepreneurship development. This calibrated strategy assures strategic continuity while focusing on sector-specific actions in a manageable group of industries capable of producing significant export growth within the NEDP implementation timeframe.

The NEDP priority sectors are listed below.

S. No.	Sector	Status
1	Auto components	New addition
2	Minerals-based sector	New addition
3	Rubber-based industries	New addition
4	Marine-based industries (including boat- and ship-building)	Retained and repositioned
5	Spices and concentrates	Retained
6	Digital products and services	Retained and repositioned
7	Electrical and electronic components	Retained
8	Processed F&B	Retained

1. Auto components

The auto components sector sits at the intersection of three competitive advantages: an emerging electronics ecosystem, strategic proximity to the fast-growing regional automotive market, and the presence of aligned sectors – such as rubber – that can offer value chain links. With global automotive supply chains shifting towards diversified suppliers, electric vehicle (EV)-related components expanding, and demand rising in both original equipment manufacturer (OEM) and aftermarket channels, Sri Lanka can position itself as a specialised Tier-2 manufacturing base. Realising this opportunity requires targeted investments in skill development, certification, testing infrastructure, supply-chain integration, SME upgrading, and policy stability. With coordinated public-private action, the auto components industry can evolve into a high-value, export-oriented sector that significantly diversifies Sri Lanka’s manufacturing export base.

The auto components sector was selected as a priority because it is already integrated into RVCs and GVCs, and it aligns with national priorities on export diversification and positioning Sri Lanka to supply emerging regional demand linked to electric mobility and advanced manufacturing.

Recent developments

Sri Lanka’s auto components sector comprises a mix of Tier-2 and Tier-3 manufacturers supplying wiring harnesses, tyres, rubber parts, battery components, precision metal parts, sensors, electronic subassemblies, and aftermarket components to OEMs in India, Japan, and the EU.

Investor interest in BOI zones has increased, with new projects in precision machining, electronics assembly, and rubber-metal components, signalling rising confidence in Sri Lanka as a reliable Tier-2 supplier. At the same time, ongoing India–Sri Lanka economic discussions are seeking to improve trade facilitation and supply-chain links for automotive intermediate goods.

Firms are also upgrading to meet global quality and technology requirements. Several manufacturers have obtained, or are in the process of obtaining, International Automotive Task Force 16949 certifications, enabling them to serve more demanding automotive clients. Universities and technical institutes have begun partnering with industry on 3D printing, computer-aided design/computer-aided manufacturing, materials testing, and automotive electronics, helping to build a stronger innovation and skills base around the sector. Together, these trends point to an emerging platform for higher-value, export-oriented growth in auto components.

Challenges in the Auto Components Value Chain	Opportunities for the Sector
<ul style="list-style-type: none"> • Scale limitations: Most firms operate at small or medium scale, limiting ability to meet high-volume orders from Tier-1 suppliers and OEMs. • High cost of advanced machinery: Computer Numerical Control machines, moulding equipment, and electronic testing systems require high upfront capital and long-term finance. • Limited supply of specialised technical labour: Shortages in industrial electronics, precision machining, and quality systems engineering. 	<ul style="list-style-type: none"> • Deepening integration with India’s automotive GVCs: India’s demand for wiring harnesses, rubber components, EV subcomponents, and cast/forged parts. • EV and hybrid vehicle components: High demand for EV-related products such as cable assemblies, battery casings, connectors, sensors, and lightweight composite parts. • Rubber-based automotive components: Leverage Sri Lanka’s strong rubber sector to export tyres, seals,

Challenges in the Auto Components Value Chain	Opportunities for the Sector
<ul style="list-style-type: none"> • Dependence on imported inputs: Steel, specialised polymers, electronic chips, and high-grade alloys are mostly imported, creating cost and lead-time vulnerabilities. • Insufficient testing and certification infrastructure: Limited domestic facilities for automotive-grade durability testing, crashworthiness-related parts testing, and EV-related validation. • Fragmented domestic supplier base: Weak links between SMEs and large lead firms hinder integration into global supply chains. • Limited growth in export volumes due to minimal sector promotion efforts. • Lack of plug-and-play industrial zones. 	<ul style="list-style-type: none"> bushings, vibration control parts, gaskets, and rubber-metal components. • Niche components for Japanese/EU OEM suppliers: Precision-machined metal parts and subassemblies for motorcycles, trucks, and compact cars. • Aftermarket components for Gulf Cooperation Council countries, Africa, and South Asia: Strong demand for replacement parts, tyres, filters, brake components, and electrical accessories. • Contract manufacturing for Tier-1 suppliers: Specialise in segments such as printed circuit board assembly, sensor housings, wiring harness finishing, and plastic injection moulded components. • Leveraging FTAs: Improved market access with regional markets such as India (India–Sri Lanka FTA) can support integration into supplier networks for OEMs like Toyota, Suzuki, Honda, Tata, Mahindra, and Hyundai.

2. Minerals-based industries

Sri Lanka's minerals-based industries encompass a range of products including value-added graphite, mineral sands, silica-based products, ceramics, and processed industrial minerals. The country possesses unique high-purity mineral deposits and an established ceramics tradition that positions the sector for value-added exports.

Only five minerals can be exported as raw minerals: quartz, mica, mineral sands, dimension stone, and graphite, with other minerals (such as limestone and clay) receiving export approval only after undergoing value addition.

Recent developments

The national mineral policy is under development and is expected to be launched in early 2026. The policy is focused on enabling market-oriented improvements over past resource-centric views, aiming to unlock market opportunities. The policy adoption is expected to be accompanied by regulatory reform in the form of legal amendments as well.

There is a gradual shift towards value addition: several firms have expanded graphite processing capacity, investing in higher-purity technologies and pilot-level anode material production for the EV battery market. Universities and start-ups are advancing research and development (R&D) in graphene-based applications that leverage Sri Lanka's unique vein graphite.

Challenges in the Mineral-based Industries Sector	Opportunities for the Sector
<ul style="list-style-type: none"> • Weak coordination between mining companies, processors, R&D institutions, and exporters. • High royalty rates and government charges (up to 30–40% of exporters’ bottom line), discouraging in-country value addition. • Cumbersome, multi-agency licensing process and land access issues, leading to significant project delays. • Lack of accredited, multi-product testing laboratories, forcing exporters to send samples abroad at extra cost. • Limited production scale and depth of mines, especially for high-value minerals like graphite and mica. • High extraction and processing costs compared with global competitors. • Insufficient financial and marketing support for international trade promotion and participation in relevant trade fairs. • Bank guarantees, VAT, and Customs duty refunds are difficult and slow to obtain. 	<ul style="list-style-type: none"> • Growing demand in international markets for value-added mineral products (e.g., quartz slabs, battery-grade graphite, garnet sand abrasives). • High-performance applications in electronics and medical devices in the US, Germany, Japan, and the Republic of Korea are driving demand for advanced materials with superior conductivity, strength, and thermal properties. • High-purity graphite and unique vein-type supply can position Sri Lanka in niche, premium markets (including advanced tech and battery sectors). • Investment in accredited testing and quality assurance labs would enhance export competitiveness and pricing. • Untapped potential in minerals like mica, mineral sands, and limestone for value-added products. • Collaboration with international partners and joint ventures can bring in modern technology and market access.

3. Rubber-based industries

Sri Lanka’s rubber-based industries include tyres, industrial and automotive rubber components, latex gloves, medical rubber products, seals, hoses, gaskets, rubber flooring, and rubber-metal bonded parts. Rubber-based industries remain one of the country’s strongest industrial sectors, backed by a century-long rubber tradition and globally competitive manufacturing capabilities. The transition towards EVs, advanced materials, and sustainable supply chains presents significant new openings. The sector remained relatively stable through 2022–2024 and shows high potential for deeper integration into GVCs, expanding links with major buyers and production networks. With a clear comparative advantage in regional and global markets, the rubber industry is well placed to compete effectively and attract new investment, particularly as it upgrades into higher-value product segments.

Recent developments

Recent developments in Sri Lanka’s rubber-based sector reflect steady upgrading and diversification. Global manufacturers operating in the country have expanded capacity for forklift, port-handling, agricultural, and off-road tyres, reinforcing Sri Lanka’s role in specialised tyre segments. Exports of surgical and examination gloves, as well as medical tubing, have increased on the back of sustained global health-sector demand. At the same time, local firms have scaled up supply of bushings, seals, gaskets, anti-vibration parts, and rubber-metal components to markets such as India and the EU. Private companies are also investing in specialised rubber compounds designed for heat resistance, durability, and EV-specific requirements, moving into more demanding applications. In parallel, the

adoption of Forestry Stewardship Council-certified rubber and eco-friendly production processes is helping producers access premium market segments

Challenges in the Rubber Sector	Opportunities for the Sector
<ul style="list-style-type: none"> • Ageing rubber trees and low replanting rates (6–7 years for yielding) are key challenges threatening long-term availability of raw materials for manufacturers. • Energy-intensive processing, reliance on imported chemicals, and relatively high labour costs increase unit production expenses, reducing competitiveness against lower-cost producers in Southeast Asia. • Smaller rubber processors often lack access to modern mixing, moulding, and quality assurance technologies. This limits their ability to produce high-value, consistent, and certification-compliant products. • The absence of structured supply contracts and traceability systems hampers coordination. This creates inefficiencies, higher transaction costs, and difficulty in securing raw material. • Most firms continue to focus on traditional rubber goods with low value addition, constraining growth opportunities and exposing the sector to market fluctuations. • Extensive testing is required to enter markets, but testing facilities and timely certificates from authorities are limited. • High electricity costs increase overall production expenses; and approvals for basic raw materials (e.g., processed rubber oil, nitrile rubber) involve multiple authorities, with committees meeting only once a month, causing delays of up to two months. • Growing demand for green/sustainable rubber requires expensive certification; IP issues present additional challenges for niche rubber products. 	<ul style="list-style-type: none"> • Sri Lanka can export EV-compatible tyres, heat-resistant compounds, and vibration-control parts to Europe, North America, and East Asia, where the shift towards EVs is driving strong demand. • Potential to supply surgical and examination gloves, catheters, medical tubing, and health-grade elastomers to the US, Europe, and Japan, where healthcare infrastructure growth and stringent quality standards are driving increased demand for certified medical rubber products. • Demand for conveyor belts, oil and gas rubber components, and engineering parts for heavy machinery in the Middle East and Southeast Asia. • Development of rubber-metal and rubber-plastic bonded products for automotive and machinery sectors aligns with demand in Europe, Japan, the Republic of Korea, and the US. • Forestry Stewardship Council-certified rubber-based consumer products have growing appeal in EU and US premium markets, driven by consumer preference for environmentally responsible, ethically sourced, and sustainable products.

4. Marine-based industries (including boat- and ship-building)

Marine-based industries in Sri Lanka include boat- and ship-building; boat and ship repair and maintenance; offshore engineering services; marine logistics support services; offshore renewable energy services; oil and gas rig construction, maintenance, and servicing; bunkering services; ancillary marine services; nautical tourism-related services; offshore wind farming; and offshore fish farming.

Sri Lanka is located along a major East–West shipping route, with over 60,000 vessels transiting annually, providing direct connectivity to Asia, the Middle East, Africa, and Europe.⁶ The sector also benefits from a strong craftsmanship tradition and competitive labour.

Sri Lanka’s marine-based industries, including boat- and ship-building, have been selected as a priority due to their strong growth potential and resilience. The sector remained stable over 2022–2024, indicating consistent performance in both domestic and export markets.⁷ It also shows high potential for deeper integration into GVCs, creating opportunities to expand exports and participate more actively in international production networks. Relatively lower tariffs further enhance the sector’s competitiveness in key markets, supporting future export growth and investment.

Recent developments

Major ports including the Port of Colombo, Port of Trincomalee, and Hambantota International Port are being developed to deliver integrated marine and offshore services.

Colombo Port, ranked among the leading container ports in South Asia, offers modern infrastructure, deep-water terminals, and global connectivity, supporting shipbuilding, ship repair, offshore fabrication, ancillary marine services, and bunkering. Trincomalee Port, a natural deep-water harbour, provides significant depth, weather protection, and year-round calm conditions suitable for rig lay-ups, with adjoining land enabling the development of a dedicated ship repair hub and integrated marine service zone. Hambantota Port provides deep-draft berthing capacity, scalable infrastructure, and facilities supporting energy-related and offshore operations. National policy frameworks and government-led marine development initiatives reinforce Sri Lanka’s commitment to advancing marine services, offshore industries, fisheries, marine tourism, and maritime logistics.

Challenges in the Marine Sector Value Chain	Opportunities for the Sector
<ul style="list-style-type: none"> Boat- and ship-building, and ship repair require specialised shipyards, advanced equipment, and substantial working capital. This creates a high barrier to entry for new players and limits the ability of existing firms to scale operations efficiently. Limited dockyard facilities for the marine industry: currently only Colombo shipyard is operational. Most local yards focus on small to medium-sized vessels. Complying with international standards such as the EU Recreational Craft Directive, <i>Conformité Européenne</i> certification, Lloyd’s Register, and International Maritime Organization regulations is costly and time-consuming. This can delay exports and 	<ul style="list-style-type: none"> Sri Lanka can target recreational boats and small yachts to markets in Maldives, Philippines, Australia, Southeast Asia, the Middle East, and Europe. Water sports boats, diving boats, and sand lagoon cruisers can cater to domestic and regional tourism markets, particularly in Maldives, Seychelles, Thailand, and Sri Lanka itself, where marine tourism is a fast-growing sector. Leveraging Sri Lanka’s strategic position in the Indian Ocean, the country can attract commercial vessels from the Middle East, East Africa, and Southeast Asia for repair, retrofitting, and maintenance services. Export of hatches, seating, stainless-steel marine hardware, and composite parts can target European and North American boat manufacturers, where there is

⁶ EDB.

⁷ Analyses based on Sri Lanka Customs data 2022–2024.

Challenges in the Marine Sector Value Chain	Opportunities for the Sector
<p>increase operational costs, particularly for small and medium-sized manufacturers.</p> <ul style="list-style-type: none"> Transporting oversized vessels involves complex cargo handling, special permits, and international shipping arrangements. These logistical hurdles increase costs and delivery times, affecting competitiveness in overseas markets. 	<p>growing demand for high-quality, precision-engineered components</p> <ul style="list-style-type: none"> Offshore engineering services related to oil and gas, liquified natural gas, offshore renewable energy, and subsea activities present growing opportunities, particularly through the development of Trincomalee and Hambantota as specialised offshore service centres. Marine logistics support services, bunkering, and port-based value-added services can be expanded by leveraging Colombo’s status as a leading regional container port. Opportunities exist in aquaculture, offshore wind energy, marine mineral exploration, and the export of marine engineering components and equipment to global markets.

5. Spices and concentrates

Sri Lanka’s spices and concentrates sector is built around a portfolio of premium, high-value products, led by Ceylon cinnamon, black pepper, turmeric, cloves, cardamom/mace/nutmeg, and ginger. The country maintains a strong global reputation for high-quality, ethically sourced spices and concentrates, reinforced by the GI status for Ceylon cinnamon and the recent formalisation of GI governance systems. These strengthen product differentiation, quality assurance, and premium positioning. The sector has been selected because it showed resilience through 2022–2024, retaining a clear comparative advantage while holding substantial untapped potential in value-added products such as branded retail packs, spice oils, and extracts aligned with rising global demand for provenance-driven, clean-label, and traceable ingredients.

Recent developments

Progress is accelerating on institutional frameworks for GI cinnamon, quality systems, and market positioning. The establishment of the Ceylon Cinnamon GI Association is a major milestone supporting traceability and quality enforcement, which ultimately aim to boost collective branding. Public agencies and the EDB have expanded representation at major food fairs such as THAIFEX, Anuga Asia, IFE Dubai, and Viet Nam Expo, broadening market links for both bulk spices and concentrates and higher-value processed products. These developments signal widening opportunities across both core bulk products and premium value-added segments.

Challenges in the Spices and Concentrates Value Chain	Opportunities for the Sector
<ul style="list-style-type: none"> Limited availability of high-yield planting materials and low adoption of improved cultivation techniques have constrained productivity growth. Challenges in ensuring high-quality packaging and labelling standards. Compliance with international standards and codes of conduct at the production and processing stages remains inadequate. 	<ul style="list-style-type: none"> Market-entry and near-term opportunities are concentrated in premium EU retail and specialty channels, value-added B2B ingredients (spice oils, extracts, oleoresins) for the food-processing and nutraceutical industries, and regional e-commerce and ethnic food retail channels in Southeast Asia, India, and the Middle East. For B2B markets, supplying standardised spice extracts and oils to food manufacturers and the

Challenges in the Spices and Concentrates Value Chain	Opportunities for the Sector
<ul style="list-style-type: none"> • Trade information is poorly disseminated, and efforts towards market promotion and branding of Sri Lankan spices and concentrates in international markets are limited. • Weak adoption of modern technology and mechanisation across the value chain. • Systems to ensure product traceability, particularly for organic and Fair Trade-certified products, are underdeveloped. • Shortage of skilled labour, particularly in the harvesting and processing stages. Workers often lack adequate knowledge of hygienic and good agricultural practices, leading to inconsistent processing standards. As a result, a significant share of cinnamon produced is of lower quality, affecting competitiveness in premium export markets. 	<p>nutraceutical sector (e.g., cinnamon extracts for supplements) offers higher margins but requires investment in extraction and quality consistency.</p> <ul style="list-style-type: none"> • Regionally, rising demand in ASEAN and India for specialty spices and concentrates and clean-label products presents an opportunity for Sri Lankan firms to serve regional processors and ethnic markets, especially when paired with improved trade facilitation. • Digital channels and cross-border e-commerce provide a lower-cost route for small and medium-sized exporters to access diaspora and specialty consumers abroad, contingent on improvements in parcel logistics, digital payments, and Customs procedures.

6. Digital products and services

Sri Lanka's digital economy sector is one of the fastest-growing contributors to the country's services export portfolio, and a central pillar of its transition towards a knowledge-based economy. In 2024, the IT-BPM industry emerged as the fourth-largest services export revenue generator in Sri Lanka. The ecosystem continues to grow, with 600+ IT companies and 80+ BPM companies operating across the country in 2022, supported by 566 registered start-ups that contribute to innovation, entrepreneurship, and new digital-product development (Sri Lanka Association of Software and Service Companies (SLASSCOM), 2024).

The sector spans software development, IT consulting, business process outsourcing and knowledge process outsourcing services, financial and accounting outsourcing, customer support, and a growing suite of technology-enabled innovation services. With a reputation for high-quality delivery, English-proficient talent, and specialised expertise in product engineering, analytics, and financial technology, Sri Lanka has positioned itself as a competitive outsourcing destination for mid-sized global clients. The sector employs more than 80,000 professionals across over 100 firms (SLASSCOM & Deloitte, 2024) and is recognised for niche, high-value service capabilities rather than large-scale commodity business process outsourcing operations. The sector was selected owing to its relatively stable export contribution, increasingly specialised talent base, and rising global demand for digital services.

Recent developments

Sri Lanka has launched the Digital Economy Strategy 2030, which outlines targeted policy initiatives to enhance the business environment, strengthen digital infrastructure, advance cybersecurity readiness, and expand the national technology skills base. Also, Sri Lanka's Vision 2030 for the IT-BPM sector aims to generate \$5 billion in export revenue, build a skilled workforce of 200,000, and foster the creation of 1,000 start-ups by the end of the decade (SLASSCOM, 2024). Entrepreneurship is being supported through the government's "Tech Start-up Support Programme" (Information and Communication Technology Agency, 2026) and the StartupSL platform (<https://startupsl.lk/>), while partnerships between the Information and Communication Technology Agency and financial

institutions are improving access to financing through credit evaluation frameworks tailored for tech companies. The sector’s positioning as an agile, high-value service hub distinct from regional call-centre-led markets continues to strengthen Sri Lanka’s branding as a quality-driven IT services destination.

Challenges in the Digital Products and Services Value Chains	Opportunities for the Sector
<ul style="list-style-type: none"> • A shortage of workers with industry-relevant skills limits supply-side capacity. • Insufficient collaboration between industry and academia reduces the ability to align existing workforce skills with industry needs and rising global competition. • Lack of financial support and infrastructure restricts entrepreneurship and the growth of IT-BPM start-ups. • Poor industry branding and repositioning of the sector across the globe. • Limited market intelligence and inadequate knowledge-sharing among companies restrict access to foreign investors. 	<ul style="list-style-type: none"> • Global demand for IT-enabled services continues to expand, particularly in areas of financial technology, digital health, education technology, cybersecurity, and artificial intelligence (AI)-driven business analytics. • Sri Lanka can capitalise on emerging outsourcing opportunities in ASEAN and Africa, where digital transformation is accelerating. • Niche service offerings such as software development for SMEs, data analytics, and cloud integration can further strengthen Sri Lanka’s position in RVCs and GVCs.

7. Electrical and electronic components sector

The electrical and electronic components sector is one of the country’s most promising export-oriented manufacturing industries, and a central driver of industrial diversification. There are more than 100 exporting companies with over 35,000 employees in the sector. The sector is targeting \$1 billion in exports by 2028.

The sector produces electronic components, wiring harnesses, capacitors, resistors, assembled electrical panels, switches, sensors, and a range of subcomponents integrated into GVCs across automotive, consumer electronics, industrial machinery, and renewable energy sectors. A growing number of firms operate as Tier-2 and Tier-3 suppliers to multinational manufacturers in Western countries.

The sector benefits from low tariffs in key export markets, a diversified portfolio covering both electronics and electrical assemblies, and significant unrealised export potential vis-à-vis regional peers. Sri Lanka’s strong human capital base, favourable geographic positioning, and established experience in precision manufacturing further enhance the sector’s competitiveness. There is significant potential to diversify into adjacent, higher-value product lines.

Recent developments

The electrical and electronic components sector remains predominantly driven by foreign investment, with leading exporters operating under the BOI regime within Export Processing Zones such as Katunayake and Biyagama.

Reconfiguration of global manufacturing networks, including the acceleration of “China+1” diversification, has created a window for Sri Lanka to position itself as a niche player in precision electronics and electrical components. The Ministry of Industry and Entrepreneurship Development and BOI are promoting new investments in industrial technology zones equipped for electronics manufacturing, while recent years have seen an uptick in investments in electrical control systems, renewable energy components, and sensor technologies.

Sector competitiveness is further supported by compliance with international standards (International Organization for Standardization (ISO)/TS16949, restriction of hazardous substances), skilled labour availability, cost competitiveness, and preferential trade access to the EU under the Generalised Scheme of Preferences Plus concessions. While the country does not have silicon fabrication capabilities, it has a strong pool of engineers, and hosts companies in software for semiconductor design as well as firms engaged in Integrated Development Environment development.

Challenges in the Electrical and Electronic Components Value Chain	Opportunities for the Sector
<ul style="list-style-type: none"> • Restricted access to the modern and innovative technologies needed to upgrade production. • Delayed clearance for imports of raw materials due to documentary requirements, which restricts order fulfilment on short order cycles. • Very limited targeted sector promotion and branding initiatives, with many firms operating as subsidiaries or contract manufacturers of US and European companies, reducing local visibility. • Insufficient R&D facilities and services for product testing, certification, and standardisation to meet export market requirements; limited local supplier networks; heavy dependence on imported raw materials. • Price competitiveness remains weak compared with India and China, especially for high value-added production lines. 	<ul style="list-style-type: none"> • Global shift towards renewable energy systems, electric mobility, and smart devices is increasing demand for components such as connectors, wiring harnesses, control panels, and sensors: segments where Sri Lanka already has technical capability. • Reconfiguration of Asian supply chains under the “China+1” strategy opens opportunities for integration into regional production networks. • Demand for high-quality, low-cost assembly services and compliance-certified electrical components offers scope for expansion. • ASEAN markets (Malaysia, Indonesia, the Philippines) present potential for B2B supply partnerships, especially in industrial automation and consumer electronics subcomponents.

8. Processed food and beverages sector

Sri Lanka’s processed F&B sector is one of the country’s most diverse and resilient manufacturing industries, covering value-added products such as processed fruits and vegetables, coconut-based products, confectionery, bakery items, sauces, beverages, and ready-to-eat foods. The sector has been prioritised due to its increasing contribution to the export basket in recent years, and its resilience to global demand fluctuations. It benefits from diversified product portfolios and strong agro-industrial links, and a regional comparative advantage. The sector also offers substantial potential for further diversification and higher-value products, positioning it as a strategic driver of export growth.

Recent developments

Initiatives by the EDB, such as the One Village One Product and 2000 Exporter programmes, have expanded rural entrepreneurship and helped producers upgrade quality. Exporters are increasingly targeting niche, health-oriented categories including functional foods, gluten-free snacks, plant-based items (mainly non-meat), and nutraceuticals, aligning with global consumption trends. Improved compliance with Organic, Fairtrade, British Retail Consortium, Food Safety System Certification, ISO, Hazard Analysis and Critical Control Points, and Good Manufacturing Practices standards has enhanced credibility and access to international buyers, while digital trade and e-commerce platforms have enabled smaller producers to reach global markets and diversify distribution channels

Challenges in the Processed F&B Value Chain	Opportunities for the Sector
<ul style="list-style-type: none"> • Restrictions on importing raw materials limit the ability of firms to process or upgrade products. • Lack of coordinated national branding efforts to enhance global visibility. • Limited access to timely market information and intelligence. • Complicated compliance requirements for food safety and traceability for SMEs. • A significant share of packaging materials such as glass jars and specialised containers are imported due to limited domestic manufacturing capacity. • Access to land: Limited availability of land for commercially cultivating raw materials restricts processors’ ability to secure a stable and scalable supply base. 	<ul style="list-style-type: none"> • The processed F&B sector holds significant opportunities in premium, health-conscious, and convenience-oriented product categories. • In the EU and North American markets, rising demand for natural, plant-based, and sustainably sourced foods positions Sri Lankan exporters to expand exports of coconut-based beverages, natural snacks, and functional foods. • Regional opportunities lie in Indian, Maldives, and ASEAN markets, where demand for processed fruit products, sauces, and ready-to-eat meals is increasing due to urbanisation and changing consumption habits. • The rise of B2B e-commerce platforms and private-label partnerships offers new channels for Sri Lankan SMEs to enter international supply chains.

Table 1: Key Export Destinations

Sector (Harmonized System (HS) codes) ⁸	Total exports, 2024 (\$ millions)	Growth, 2020–2024 (%)	Key importers, 2024 exports (\$ millions)
Auto components			
HS code 87	49.44	-12	Germany (6), UK (5.8), Australia (5.5), Poland (4.6), US (3.7)
HS code 84	190.00	8	US (67.3), Germany (20.09), France (15.28), India (12.94), UK (11.13)
HS code 85	294.14	1	Switzerland (54.91); India (29.08); US (21.66); Bangladesh (18.91); Hong Kong, China (16.19)
Minerals-based products			
HS code 25	18.00	-2	Japan (4.4), China (3.7), India (3.3), Malaysia (1.7), USA (1)
HS code 68	16.90	19	Pakistan (5.13), Spain (2.17), India (2.08), US (1.5), Netherlands (1.48)
Rubber and related articles (HS 40)	1 001.53	0	US (330.32), Germany (95.6), Belgium (63.7), Italy (48.8), Brazil (42.67)
Ships, boats and floating structures (HS 89)	41.10	81	Norway (35.2), Spain (2.6), France (0.94), India (0.74), Netherlands (0.5)
Processed F&B			
HS code 08	198.20	1	India (56.36), United Arab Emirates (UAE) (25.46), US (11.38), Saudi Arabia (10.19), Germany (8.44)
HS code 16	28.73	7	US (21.56), UK (2.06), Netherlands (0.78), China (0.77), India (0.52)
HS code 18	25.28	32	UAE (10.97); Bangladesh (3.28); Hong Kong, China (3.24); US (2.75); Singapore (1.32)
HS code 20	257.73	4	US (51.79), Netherlands (40.13), Germany (34.08), UK (22.14), France (14.83)
HS code 21	127.40	4	Ireland (21.97), Cyprus (15.98), US (8.26), Australia (8.05), Maldives (7.91)
HS code 22	74.59	24	India (42.56), Uganda (8.93), UAE (4.94), Singapore (3.23), Maldives (3.05)
Electronics and Electronics Components (HS 85)	294.14	1	Switzerland (54.91); India (29.08); US (21.66); Bangladesh (18.91); Hong Kong, China (16.19)
Spices and concentrates			
HS code 0906	0.21	-2	Mexico (83.39), US (28.06), Peru (27.60), Colombia (11.22), Ecuador (9.56)
HS code 0904	0.17	22	India (157.73), Germany (5.08), US (1.95), UAE (1.72), Spain (1.26)
HS code 0907	12.52	-4	US (3.63), Saudi Arabia (2.95), UK (0.91), Germany (0.7), UAE (0.58)
IT-BPM (BPM Code: 9)	0.97		
Code: 9.1 - Telecommunications services	0.12	Data not available	Data not available
Code: 9.2 - Computer services	0.84		

Source: [ITC Trade Map](#).

⁸ The export destinations listed represent the top five markets for the sector, and the HS codes are provided solely for basic reference, mapped at the 2-digit level to illustrate the broad, generic product categories identified as priority sectors. A more detailed analysis, focusing on 4- and 6-digit HS codes, is presented in the subsequent section.

CHAPTER 3: MARKETS IN FOCUS

The following section provides an overview of priority export markets and highlights major import trends, distribution channels, market-entry requirements, and evolving buyer and consumer preferences across selected destinations. Together, these insights offer a clearer understanding of demand conditions and the standards that exporters must meet to compete effectively in international markets.

Four growth options for each NEDP priority sector are identified as follows:

1. **Market penetration:** Grow sales of existing products in existing markets by increasing share and usage.
2. **Product development:** Grow by introducing new or improved products to existing markets.
3. **Market development:** Grow by taking existing products into new customer segments or geographies.
4. **Full diversification:** Grow by launching new products in new markets. Often the most difficult to achieve.

The product-market analysis presented was developed using multiple parameters. It draws on product diversification tools ([ITC Export Potential Map](#)) to identify additional product opportunities within the sector, insights from consultations with industry experts, and feedback gathered through the private-sector roundtable held in Colombo in October 2025. Markets have also been incorporated using available export potential assessment tools (ITC Export Potential Map) supplemented by survey responses and stakeholder discussions. Accordingly, Table 2 is intended solely as a reference point to provide readers with an indicative view of potential markets that exporters may consider. It does not represent the full universe of market opportunities, nor the complete potential of the sector or the country to diversify the export basket.

Table 2: Overview of Current and Target Product-Market Combinations

Auto Components				
PRODUCTS				
MARKETS		Current Products	New Products	
	Current Markets		Market penetration (current products to current markets)	Product development (new products to current markets)
			Precision components: <ul style="list-style-type: none"> Parts and accessories of motor vehicles Parts for internal combustion engines Electrical ignition or starting equipment for internal combustion engines, including spark plugs, ignition coils, starter motors, dynamos, alternators, and their parts (Germany; UK; Australia; Poland; US; France; India; Switzerland; Bangladesh; and Hong Kong, China)	Aftermarket segment components (Germany; UK; Australia; Poland; US; France; India; Switzerland; Bangladesh; and Hong Kong, China)
	New Markets		Market development (current products to new markets)	Full diversification (new products to new markets)
		Precision components: <ul style="list-style-type: none"> Parts and accessories of motor vehicles Parts for internal combustion engines Electrical ignition or starting equipment for internal combustion engines, including spark plugs, ignition coils, starter motors, dynamos, alternators, and their parts (Netherlands, Canada, Italy, Mexico, Turkey)	<ul style="list-style-type: none"> Aftermarket segment components (Netherlands, Italy, Turkey) Local assembly components (ASEAN, Canada) 	

Mineral-based Industries				
PRODUCTS				
MARKETS		Current Products	New Products	
	Current Markets		Market penetration (current products to current markets)	Product development (new products to current markets)
			<ul style="list-style-type: none"> Granite tabletops, countertops, wall panels Quartz, especially grits and micronised powder for semiconductors and glass (Japan, Germany) Quartz powder (Germany) Quartz as part of crucibles (Germany) Mica for electrical insulation and construction board (Japan and East Asia) Graphite (Germany) 	<ul style="list-style-type: none"> Quartz slabs (Middle East, Germany and US) Mica construction boards (Japan)
	New Markets		Market development (current products to new markets)	Full diversification (new products to new markets)
		<ul style="list-style-type: none"> Silica quartz slabs like countertops and wall panels (Middle East) 	<ul style="list-style-type: none"> Garnet sand abrasives (Denmark) Engineered quartz slabs and other value-added mineral products (US) Battery-grade graphite, particularly for use in lithium-ion batteries for EVs (US) 	

Rubber- based industries			
PRODUCTS			
MARKETS	Current Markets	Current Products	New Products
		Market penetration (current products to current markets)	Product development (new products to current markets)
	Pneumatic tyres solid tyres, rubber seals (North America and EU)	<ul style="list-style-type: none"> • EV tyres, yoga mats, medical components (rubber) • Electrical rubber insulated products, footwear (rubber soles) • High-performance rubber composites and technical rubber goods (Forest Stewardship Council-certified) • Rubber gloves (industrial / medical) (North America and EU)	
	Market development (current products to new markets)	Full diversification (new products to new markets)	
New Markets	Industrial tyres (South America, Eastern Europe, Malaysia, Japan)	Medical-grade rubber goods, aircraft tyres, bridge bearings (EU, Japan, Republic of Korea, Mexico)	

Marine Industries (including boat- and ship-building)			
PRODUCTS			
MARKETS	Current Markets	Current Products	New Products
		Market penetration (current products to current markets)	Product development (new products to current markets)
	Fishing yachts, small craft boats / recreational boats (Norway, France, India, Spain, Netherlands, Seychelles, Mauritius)	Fibre-reinforced plastic vessels, luxury boats, electric / hybrid boats, nautical tourism products, advanced composite boats, marine components (navigation modules) (Netherlands, Spain, Seychelles, Mauritius)	
	Market development (current products to new markets)	Full diversification (new products to new markets)	
New Markets	Fishing yachts, small craft boats / recreational boats (Maldives, Philippines, Mauritius, East Asian countries, Western Europe, Scandinavian countries, East African Community countries, Zimbabwe)	<ul style="list-style-type: none"> • Propellers, boat accessories, engine gear (EU, Maldives) • Offshore rig layup and servicing (oil and gas operators in the Middle East and Asia-Pacific) • Offshore engineering services and fabrication (oil and gas engineering, procurement, and construction contractors; renewable energy developers; offshore construction firms) • Bunkering services expansion (Container lines, cruise operators, environmentally conscious shipping companies) • Marine logistics support (all shipping segments transiting the Indian Ocean) 	

Spices and Concentrates			
PRODUCTS			
MARKETS	Current Markets	Current Products	New Products
		Market penetration (current products to current markets)	Product development (new products to current markets)
	<ul style="list-style-type: none"> Cinnamon (Mexico, Peru, Colombia, Ecuador, US, China, Japan, EU) Black pepper (India, Germany, US, UAE, Spain) Cloves (US, Saudi Arabia, UK, Germany, UAE) <p>Other existing markets: China, Japan</p>	<ul style="list-style-type: none"> High-value perfumery products (US, Italy) Nutraceutical products (US) Cosmetic facial creams / lotions (Japan) 	
	New Markets	Market Development (current products to new markets)	Full diversification (new products to new markets)
<ul style="list-style-type: none"> Cinnamon (Bangladesh, Guatemala, Viet Nam) Black pepper (Italy, Netherlands) Cloves (India, Indonesia) 	<ul style="list-style-type: none"> Cosmetic facial creams / lotions (EU) 		

Digital Products and Services			
PRODUCTS			
MARKETS	Current Markets	Current Products	New Products
		Market penetration (current products to current markets)	Product development (new products to current markets)
	<ul style="list-style-type: none"> Software development IT consulting Business process outsourcing Financial technology solutions AI/machine learning data analytical services Blockchain technology Cybersecurity services Cloud engineering Enterprise resource planning support services <p>(US, UK, EU, Japan, South Asia, Australia, Scandinavia)</p>	<ul style="list-style-type: none"> Global support centres Agri-tech solutions Legal process outsourcing / knowledge process outsourcing <p>(East African Community countries, Japan, Commonwealth countries)</p>	
	New Markets	Market development (current products to new markets)	Full diversification (new products to new markets)
<ul style="list-style-type: none"> Software development IT consulting Business process outsourcing financial technology solutions AI / machine learning data analytical services Blockchain technology Cybersecurity services <p>(ASEAN countries for all services)</p>	<ul style="list-style-type: none"> Cloud engineering services <p>(Middle East, South America, ASEAN countries)</p>		

Electrical and Electronic Components			
PRODUCTS			
MARKETS	Current Markets	Current Products	New Products
		Market penetration (current products to current markets)	Product development (new products to current markets)
	<ul style="list-style-type: none"> Wiring harnesses (Japan) Sensor technology products (Japan) Assembled electrical panels, motor control devices, transformers for audio / refined applications, cable assemblies (for automotive applications) (Switzerland, India, US, Bangladesh, Hong Kong, China) <i>Other existing markets: Australia, East African Community countries, EU, South America, Pakistan</i>	<ul style="list-style-type: none"> Printed circuit board fabrication (US) Box building assemblies (US) EV batteries (EU) 	
	Market development (current products to new markets)	Full diversification (new products to new markets)	
<ul style="list-style-type: none"> Wiring harnesses, sensor technologies, high-mix low-volume components (Germany, Italy, UK, Mexico, Canada)	<ul style="list-style-type: none"> Semiconductor engineering products (Germany, Italy, UK, Mexico, Canada)		

Processed F&B			
PRODUCTS			
MARKETS	Current Markets	Current Products	New Products
		Market penetration (current products to current markets)	Product development (new products to current markets)
	<ul style="list-style-type: none"> Coconuts and processed coconut products (India, US, UAE) Fish products (US, UK, Netherlands) Cocoa and cocoa products (UAE, Bangladesh, Hong Kong, China) Beverages (India, Uganda, UAE) Ready-to-eat items / snacks (Ireland, Cyprus, US) 	<ul style="list-style-type: none"> Plant-based beverages (India, US) Gluten-free snacks (US) Protein concentrates (US, Netherlands) 	
	Market development (current products to new markets)	Full diversification (new products to new markets)	
<ul style="list-style-type: none"> Processed coconut products (Thailand, Netherlands, Canada) Fish products (Hong Kong, China, Japan, Singapore) Ready-to-eat items/snacks (Hong Kong, China, Thailand) 	<ul style="list-style-type: none"> Plant-based beverages (Canada, Viet Nam) Gluten-free snacks (Canada, Maldives) Protein concentrates (Republic of Korea, UAE) 		

The tables below present the key products within Sri Lanka’s current export portfolio, considering the sector’s supply-side capabilities. They highlight the product-market relationships that may be further deepened, and distribution channels, providing readers with an overview of relevant markets and regional or global import trends. This information is intended to facilitate an understanding of the sector’s positioning within these economies. In addition, the tables outline the fundamental requirements of buyers, which serve as critical reference points for market entry, penetration strategies, and product diversification initiatives.

Auto components	
HS code 8708	
Description	Parts and accessories for motor vehicles: Precision components such as pistons, piston rings, valves; transmission components: gears, shafts, steering, and suspension parts: precision bearings, bushings, ball joints; brake system components: ABS parts, brake valves (aftermarket segment)
Market combinations	US, Spain, Saudi Arabia, Germany, Russia, UK, India
Import trends	Global imports growing due to EV transition; demand for lightweight components, electronics, and sensors, mainly from the US, EU, and Asia-Pacific (McKinsey & Company, 2023).
Distribution channels	<ul style="list-style-type: none"> • Tier-1 / Tier-2 suppliers to OEMs • Aftermarket distributors • E-commerce (small parts) • Auto service networks
Key market-entry and buyer requirements	<p>Regulatory: International Standard for Automotive Quality Management (ISO/TS 16949 – International Automotive Task Force 16949), ISO 9001</p> <p>Safety:</p> <ul style="list-style-type: none"> • E-marking (EU) • Federal Motor Vehicle Safety Standards (US) <p>Environmental: End of Life Vehicles Directive; Registration, Evaluation, Authorisation, and Restriction of Chemicals compliance</p> <p>Supply: Consistent delivery schedules, just-in-time capabilities</p>
HS code 8409	
Description	Engine parts and components (precision components), local assembly components
Market combinations	Singapore, Germany, Russia, India, UAE, Maldives
Import trends	Engines shifting to hybrid / EV: Demand for conventional combustion engine parts is steadily declining but still strong in developing economies (McKinsey & Company, 2023).
Distribution channels	OEM supply chains, wholesale distributors, auto repair networks
Key market-entry and buyer requirements	<ul style="list-style-type: none"> • High durability testing • Emissions compliance • Metallurgy standards • Restriction of hazardous substances compliance
HS code 8511	
Description	Ignition, starter motors, electrical equipment (aftermarket segment)
Market combinations	Japan, Singapore, Hong Kong, China, Thailand, Russia, Maldives, US
Import trends	<ul style="list-style-type: none"> • Rising demand for ignition equipment owing to automotive logistics market, mainly in ASEAN markets (Automotive Logistics, 2025). • On the production side, the “China + 1 strategy” of many international and Western OEMs is driving strong investment in component and vehicle production in ASEAN • Increasing focus on EV production and battery supply chain • The entrance of lower-cost Chinese EVs is a strong driver of demand and localised production
Distribution channels	OEM electronics integrators, EV assemblers
Key market-entry and buyer requirements	<ul style="list-style-type: none"> • <i>Conformité Européenne</i> / Underwriters Laboratories certification • ISO 26262 (functional safety) • American Society for Testing and Materials standards

Minerals-based industries	
HS code 2525 / 2526	
Description	Mica and mica powder
Market combinations	Japan, Republic of Korea, and China. Japan is the predominant importer (Sri Lankan mica is used for electrical insulation (e.g., mica tape production, fireproof cables, and board production))
Import trends	<ul style="list-style-type: none"> • High demand in international markets, particularly for large-sized mica pieces required for insulation products • Rising demand for high-purity, sustainably sourced mica for cosmetics, automotive paints, and electronics • Increasing demand for consistent thickness mica sheets for electronics • Construction / paints sector uses high-volume, lower-grade mica powder
Distribution channels	<ul style="list-style-type: none"> • Electronics manufacturers, mica capacitors producers • Cosmetics formulation companies, beauty-product OEMs • Paint and coatings manufacturers
Key market-entry and buyer requirements	<ul style="list-style-type: none"> • Ethical-sourcing certification • Particle-size uniformity, brightness index • Volume consistency • Moisture control • Traceability documentation • ISO 9001, cosmetic-grade certifications (International Fragrance Association-compliant) • Electrical insulation quality testing
HS code 2506	
Description	Quartz (other than natural sands)
Market combinations	China, Japan, Republic of Korea, EU (Germany) Sri Lankan quartz is exported in three main forms: <ul style="list-style-type: none"> • Grits • Micronised powder • Engineered stone slabs US, EU (Germany), Japan, Republic of Korea, China
Import trends	Moderate-high growth in the following segments: <ul style="list-style-type: none"> • Semiconductor industry (epoxy moulding compound market), and in high-quality glass and laboratory glassware. Also used for the outer layer of crucibles • Manufacturing high-quality glass and laboratory equipment, and as part of crucibles • Countertops in construction (kitchens, bathrooms) and commercial spaces
Distribution channels	<ul style="list-style-type: none"> • Japanese and Taiwanese joint ventures in Sri Lanka • Direct B2B partnerships. Shipping from Sri Lanka to buyers in Japan, Germany, and other markets
Key market-entry and buyer requirements	High-purity quartz is preferred, especially for the semiconductor and high-quality glass industries. Low levels of impurities (iron, aluminium) are crucial; buyers often specify maximum allowable parts-per-million content. <ul style="list-style-type: none"> • ISO 9001, American Society for Testing and Materials specifications • Moisture control, contamination-free processing • Registration, Evaluation, Authorisation, and Restriction of Chemicals compliance for EU markets • Traceability and environmental compliance
HS code 2504	
Description	Graphite
Market combinations	US, EU (Germany), Asia (Japan, Republic of Korea, India, China)
Import trends	<ul style="list-style-type: none"> • Strong demand from industrial users for lubricants, carbon brushes, and other graphite-based products • Surge in demand due to EV / battery manufacturers and high-tech applications • Markets shifting to high-carbon, low-ash graphite for batteries

Contd....

HS code 2504	
Distribution channels	<ul style="list-style-type: none"> • Predominantly through direct shipment by mining companies (wholly or partially foreign owned) • Marketing managed through overseas parent or partner companies • Refractory and steel plants • Lubricant manufacturers
Key market-entry and buyer requirements	<ul style="list-style-type: none"> • Consistent quality and secure, reliable supply are mandatory, especially for buyers in battery and EV industries (carbon content ≥94–98%) • Large international buyers (e.g., those in the battery supply chain) need assurance of high-volume, ongoing supply • For advanced uses (e.g., EVs, graphene), traceability and conformity to international standards are important • Registration, Evaluation, Authorisation, and Restriction of Chemicals compliance for EU markets
HS code 2505	
Description	Natural mineral sands (ilmenite, rutile, zircon, garnet, and sillimanite)
Market combinations	EU, Middle East, US, and Asia
Import trends	<ul style="list-style-type: none"> • Global mineral sands imports are growing, driven by demand for titanium products, pigments, ceramics, and industrial abrasives • Buyers currently source mainly from Australia, South Africa, India, and Mozambique • Specific demand: <ul style="list-style-type: none"> ○ Titanium dioxide pigment industry worldwide ○ Ceramics, refractory, and glass industries needing high-quality zircon and sillimanite ○ Abrasives market, notably for garnet sand used in ship maintenance and industrial cutting, especially in Europe (e.g., Denmark)
Distribution channels	<ul style="list-style-type: none"> • State-run enterprises • Distribution is currently direct to overseas industrial customers or through established processors • Foreign investors / joint ventures is a promising channel provided regulatory approvals can be streamlined
Key market-entry and buyer requirements	<ul style="list-style-type: none"> • Buyers and potential investors require clarity on what product stages can be exported, e.g., heavy mineral concentrate, separated minerals (ilmenite, rutile, zircon, etc.), value-added forms (synthetic rutile, titanium dioxide pigment) • High purity and proper mineral separation • Consistent, reliable volume is needed for large contracts • Garnet sand buyers (e.g., in Denmark / Europe) demand bagged, ready-for-use material
HS codes 25XX and 68XX⁹	
Description	Dimension stones: cut / finished stones (granite, marble)
Market combinations	EU, Asia (Japan, Republic of Korea, India), Middle East
Import trends	<ul style="list-style-type: none"> • Used primarily for countertops, tabletops, wall panels, and construction materials • Strong demand from premium construction markets <p>Note: While limestone exports are not allowed from Sri Lanka, producing value-added products like precipitated calcium carbonate presents a growth opportunity for both import substitution and export.</p>
Distribution channels	<ul style="list-style-type: none"> • Export managed by local exporting companies with established trade relationships • Increasing shift from natural dimension stone products to quartz slabs / artificial marble production to align with global trends
Key market-entry and buyer requirements	<ul style="list-style-type: none"> • Consistent size, colour, and finish are critical • International buyers expect standardised, well-processed, and aesthetically uniform products • Must be able to fulfil large or repeat orders for large projects • With artificial stone gaining market share, cost and variety are major buyer considerations

⁹ Includes multiple HS codes, depending on the cut and use of the dimension stone.

Rubber-based industries	
HS code 4011	
Description	New pneumatic tyres
Market combinations	US, Brazil, Germany, France, Italy
Import trends	<p>The North American pneumatic tyres market is set to exhibit tremendous growth up to 2034, underpinned by ongoing demand from the automotive, agricultural, and defence industries. Government expenditure on road safety, and tax incentives for EV purchases, are driving the regional market further (Global Market Insights, 2025).</p> <p>Europe is a mature but innovation-led region with a pronounced emphasis on environmental compliance. The EU has tough laws on tyre labelling, noise emissions, and rolling resistance, which are influencing product development strategies. Germany, France, and Italy are major players in the market in this region, and demand for winter and performance tyres is growing.</p> <p>Asia-Pacific is predicted to be the quickest-growing market, driven by growing middle-class populations, increasing vehicle manufacturing, and aggressive infrastructure growth. The likes of India, China, and Viet Nam are fast emerging as global manufacturing hubs for tyres and tyre exports with high FDI (Global Market Insights, 2025).</p>
HS code 4015	
Description	Articles of apparel and clothing accessories, including gloves, mittens, and mitts, for all purposes (rubber gloves: industrial / medical)
Market combinations	US, UK, Germany, Belgium, Brazil, India, France
Import trends	<p>Growth drivers across regions include stronger regulation and awareness of workplace safety (manufacturing, chemical, construction sectors), plus rising demand for higher-performance gloves (cut-resistant, chemical-resistant, sustainable / eco-friendly) and reusable / industrial-grade variants (Grand View Research, 2025).</p> <p>Nitrile gloves are highly valued for their superior puncture resistance and chemical resistance, particularly to solvents commonly used in pharmaceutical production. As the pharmaceutical industry continues to expand, the demand for nitrile gloves is set to rise, further boosting market growth (Grand View Research, 2025).</p>
HS code 4016	
Description	Articles of vulcanised rubber other than hard rubber; high-performance rubber composites ¹⁰
Market combinations	US, Sweden, Canada, Germany, France, Japan
Import trends	Shift towards high-performance, low-rolling-resistance compounds; expansion of Asia-Pacific manufacturing and infrastructural spending (Mordor Intelligence, 2025c)
HS codes 4001–4002	
Description	Natural rubber latex, compounded rubber
Market combinations	Central and South America; Japan, Republic of Korea, Middle East ¹¹
Import trends	Demand linked to EV-led tyre demand surge; rebound of Chinese construction and mining; medical glove capacity expansions; AI-enabled precision tapping components and infrastructure boom in ASEAN and India (Mordor Intelligence, 2025b)
Distribution channels (all products)	<ul style="list-style-type: none"> • OEM supply chains, aftermarket distributors, fleet operators • Medical distributors, online retail, industrial buyers • B2B OEM suppliers • Rubber processors, manufacturers • Wholesalers, retailers
Key market entry and buyer requirements (all products)	<ul style="list-style-type: none"> • E-marking (EU) • Department of Transportation marking (US) • International Standard for Automotive Quality Management (ISO/TS 16949) • <i>Conformité Européenne</i> mark, Food and Drug Administration certification (US), ISO 13485 • Restriction of hazardous substances • Registration, Evaluation, Authorisation, and Restriction of Chemicals compliance • Purity, viscosity specifications

Marine-based Industries (including boat- and ship-building)		
	HS code 8903	HS code 8908
Description	Yachts and other vessels for pleasure or sports; rowing boats and canoes (speed boats)	<ul style="list-style-type: none"> Vessels and other floating structures for breaking up Fibreglass products for the auto sector¹²
Market combinations	US, Spain, France, Netherlands, Seychelles, Canada, Australia, Maldives, Scandinavia, East African countries, Zimbabwe	Seychelles, Mauritius ¹³
Import trends	<ul style="list-style-type: none"> The US remains the world's largest importer of recreational boats, with strong multi-billion-dollar import volumes through 2022–2024 EU markets (Netherlands, France, Spain) show steady demand, driven by leisure boating and marine tourism growth Maldives, Seychelles, and Mauritius continue to import small craft, dive boats, lagoon cruisers and fibre-reinforced plastic vessels to support tourism expansion The Dutch market shows resilience, with steady recreational-boating imports as part of broader EU demand; imports are supported by high participation in water recreation and steady consumer spending on leisure craft (Statistics Netherlands, 2024) 	
Distribution channels	<ul style="list-style-type: none"> Direct sales to marinas, yacht brokers, charter companies, and tourism operators in Europe and the Indian Ocean region B2B channels such as shipyards, port authorities, government procurement, and marine logistics firms Online yacht marketplaces and digital sales channels for smaller craft and components Direct maintenance, repair, and operations contracting with fleet operators and regional shipping lines for repair and retrofit services 	
Key market-entry and buyer requirements	<ul style="list-style-type: none"> <i>Conformité Européenne</i> marking and EU Recreational Craft Directive compliance for export to Europe International Maritime Organization safety standards, corrosion-resistant materials, and ISO-grade marine components Documented traceability, quality assurance, and reliable delivery schedules Strong after-sales support, warranties, and availability of spare parts (especially for charter and tourism operators) 	
Services		
Service	Ship repair and maintenance	
Capability components / sub-service activities	<ul style="list-style-type: none"> Dry-dock and afloat repairs Mechanical and electrical maintenance Hull and coatings work 	
Rationale	Increasing demand linked to ship repair and maintenance from both East and West shipping channels	
Any specific markets?	N/A	
Service	Offshore asset repair and heavy marine engineering	Rig layup, preservation, and reactivation support
Capability components / sub-service activities	<ul style="list-style-type: none"> Structural repairs and refurbishment Heavy engineering and lifting capability Major overhaul support 	<ul style="list-style-type: none"> Layup and preservation planning Inspection and integrity checks Reactivation readiness support
Rationale	Vessels currently rely on overseas facilities in Singapore, Mumbai, and Middle East hubs for rig storage and maintenance services. Trincomalee Port, with its natural harbour, can be positioned to provide these services domestically.	
Any specific markets?	Oil and gas operators in the Middle East and Asia-Pacific	

¹⁰ Feedback from a survey rolled out for industry associations in October 2025.

¹¹ Inputs based on the private sector roundtable discussions with industry representatives held in Colombo in October 2025.

¹² Inputs based on the private sector roundtable discussions with industry representatives held in Colombo in October 2025.

¹³ Inputs based on the private sector roundtable discussions with industry representatives held in Colombo in October 2025.

Services	
Service	Offshore engineering services and fabrication
Capability components / sub-service activities	<ul style="list-style-type: none"> • Engineering design and project support • Fabrication and module assembly • Installation and commissioning support
Rationale	Growing demand for offshore platform components, subsea structures, and renewable energy installations (offshore wind)
Any specific markets?	Oil and gas engineering, procurement, and construction companies; renewable energy developers; offshore construction firms
Service	Floating production storage and offloading unit (conversion and repair)
Capability components / sub-service activities	<ul style="list-style-type: none"> • Conversion engineering support • Integration and upgrade works • Life-extension and repair support
Rationale	Growing global demand for life-extension, retrofit, and maintenance services creates opportunities to attract regional projects, build a specialised offshore services cluster, and generate higher-value export earnings through partnerships and phased capability upgrades. Sri Lanka can leverage its strategic Indian Ocean location, existing shipyard capacity, and competitive engineering services.
Service	Subsea engineering services
Capability components / sub-service activities	<ul style="list-style-type: none"> • Subsea project engineering • Inspection and repair planning • Subsea systems support
Rationale	Demand is mobile and can be serviced cross-border. Specialisation in subsea engineering can be developed, building on marine repair, fabrication, and logistics strengths to offer higher-value engineering, inspection planning, and systems support for regional offshore projects.
Any specific markets?	N/A
Service	Bunkering services
Capability components / sub-service activities	<ul style="list-style-type: none"> • Bunkering supply and operations, fuel supply operations • Storage and handling capability • Quality and compliance management
Rationale	There is a global shipping transition to cleaner fuels. This provides an opportunity to position Hambantota and Colombo as green bunkering hubs.
Any specific markets?	Container lines, cruise operators, environmentally conscious shipping companies
Service	Marine logistics and support services
Capability components / sub-service activities	<ul style="list-style-type: none"> • Port and terminal support • Offshore supply-base and warehousing spares, and crew logistics coordination
Rationale	Proximity to major sea lanes supports a “fast turnaround, low diversion time” proposition for vessels needing spares, crew changes, and rapid port services
Any specific markets?	All shipping segments transiting the Indian Ocean
Distribution channels (all services)	<ul style="list-style-type: none"> • Direct sales to marinas, yacht brokers, online yacht marketplaces, charter companies • B2B shipyards, port authorities, maritime logistics companies • Government procurement, defence contractors • Marine parts distributors, shipyards

Spices and Concentrates	
HS code 0906	
Description	Cinnamon and cinnamon-tree flowers
Market combinations	USA, EU (Netherlands / Germany / France), Mexico, Latin America, Middle East
Import trends	<ul style="list-style-type: none"> • Robust demand in Latin America (Mexico as leader) • EU imports stable, with cinnamon as the fifth most-imported spice in 2023 (Eurostat, 2024).
Distribution channels	Primarily via spice importers / wholesalers in destination countries (Centre for the Promotion of Imports from Developing Countries, 2023). Whole quills shipped in bulk, then re-packed by local distributors for retail or supplied to food / beverage producers.
HS code 0904 / 0904.xx	
HS code 0907	
Description	Pepper (black pepper whole/crushed/ground)
Market combinations	India (bulk imports for spice blending and re-export), UAE and other Gulf Cooperation Council countries, EU (Germany, Netherlands), US (food processors)
Import trends	India is the top importer and growing – it has a growing spice processing sector and shortfalls in its domestic crop. EU imports are stable.
Distribution channels	<p>Exported mainly via traders and brokers:</p> <ul style="list-style-type: none"> • Bulk traders / commodity channels (B2B): Large shipments to processors, packers, and re-exporters (India, UAE, Netherlands). Important for pepper, cloves (United Nations Industrial Development Organization, 2023) • Wholesale importers / distributors: Supply to food processors, industrial buyers (oil, oleoresin) (United Nations Industrial Development Organization, 2023) • Private-label and branded retail: Supermarkets and specialty stores in the EU, the US and Gulf Cooperation Council countries; higher margins for branded single-origin packs (cinnamon, nutmeg)
Key market-entry and buyer requirements (all products)	<p>Regulatory and certification</p> <ul style="list-style-type: none"> • Phytosanitary certificate (export phytosanitary / plant health) • Maximum Residue Limits compliance (pesticide residues) for EU/US • Food safety systems: Hazard Analysis and Critical Control Points / Good Manufacturing Practices, ISO 22000 / British Retail Consortium / Food Safety System Certification 22000 for food processors and packers supplying retailers • Organic / fair trade / sustainability certifications when targeting premium segments <p>Quality and product specifications</p> <ul style="list-style-type: none"> • Consistent grade, low foreign matter, correct moisture, high oil content (for cinnamon / clove), and clear product specifications (size, variety, pre-cleaning) • Traceability and provenance: Lot tracing from farm → processor → export; pack labelling requirements (origin, batch / lot number, best-before date) <p>Packaging and commercial</p> <ul style="list-style-type: none"> • Retail packaging (consumer packs) requires attractive, functional, and regulatory-compliant labels (language, nutritional information where applicable) • Shelf-stable, vacuum packaging for longer shelf life for distant markets • Private-label agreements often require barcodes and have contractual product specifications

Digital Products and Services ¹⁴	
Description	Custom software development (web / enterprise)
Market combinations	US, UK, Australia, EU, South Asia
Description	Back-office / finance and accounting business process outsourcing, knowledge process outsourcing (legal, healthcare, human resources analytics)
Market combinations	Australia, UK, US, Japan, South Asia
Description	Cloud engineering services
Market combinations	US, Australia, UK
Description	Data analytics services (AI / machine learning)
Market combinations	US, EU, Scandinavia
Description	Cybersecurity services
Market combinations	UK, US
Description	AI-based product development, blockchain, user interface / user experience, business process automation (robotic process automation), credit risk management systems for banks
Market combinations	US, Australia, UK
Description	Global support data centres
Market combinations	US, Australia, UK
Import trends (all products)	<ul style="list-style-type: none"> • The global outsourcing and IT services market is large and growing: Expanding global demand for software, cloud, analytics, and cybersecurity (Grand View Research, 2024) • For BPM specifically, SLASSCOM evidence shows Australia, the US, and the UK as top export destinations for Sri Lankan BPM services, with growing demand in Scandinavia and Singapore. This makes these markets priority targets (SLASSCOM, 2021) • Buyers increasingly prefer higher-value outcomes (product engineering, AI, cloud services) rather than low-cost transactional work, so suppliers must move up the value chains (Grand View Research, 2024) • Rapid growth and adaptation of AI across industries; IFRS 9 compliance transition (notably in Bangladesh), with significant export opportunities for IT solutions
Distribution channels (all products)	<ul style="list-style-type: none"> • Direct sales and account management: Classic channel for B2B IT services (enterprise deals, long sales cycles) • Channel and cloud marketplaces: Partner programmes for packaged solutions and managed services • Digital platforms and staffing marketplaces: For staff augmentation, contractor models, and short engagements • Offshore-nearshore delivery hubs and subsidiaries: Local sales presence and Sri Lankan delivery centre model (common for BPM and software) (SLASSCOM, 2021)
Key market-entry and buyer requirements (all products)	<p>Technical / compliance:</p> <ul style="list-style-type: none"> • Security and privacy: ISO / International Electrotechnical Commission 27001, System and Organization Controls 2 (Type II) for US clients, General Data Protection Regulation readiness for EU work, Health Insurance Portability and Accountability Act for healthcare clients. • Quality and delivery: ISO 9001, Capability Maturity Model Integration (if targeting large enterprise engineering contracts) and demonstrable Agile / DevOps practices • Cloud/vendor certifications: Amazon Web Services / Azure / Google Cloud Platform partner status and certified engineers for managed services.

¹⁴ United Nations Central Product Classification and Extended Balance of Payments Services are the international standards used for trade in services data (computer services, telecommunication, business services, etc.), hence the nomenclature has been used to describe digital products and services, which is a broader category.

Electrical and Electronic Components	
HS code 8501–8504	
Description	Transformers, static converters, electric motors
Market combinations	US, UK, India, Singapore, Spain, Germany, Switzerland
Import trends	<p>The US and Germany remain by far the largest global importers of both transformers / static converters and electric motors in the world (ITC Trade Map). Germany is also a major importer, reflecting ongoing demand in advanced manufacturing (United States Department of Commerce International Trade Administration, 2025).</p> <p>Advancing robotics and automation: Across most of these markets, imports of electric motors, generators, transformers, and static converters have increased steadily over the past five years, reflecting rising global demand driven by robotics and the automation industry (United States Department of Commerce International Trade Administration, 2025).</p>
HS code 8542 / 8541	
Description	Electronic integrated circuits and semiconductors (integrated circuits, diodes, transistors)
Market combinations	US, India, Canada, Switzerland, Malaysia
Import trends	Global demand for electronic components is growing. Semiconductors and active / passive components), driven by the Internet of Things, automotive electrification, renewable energy, and 5G / telecom infrastructure. This expands demand for modules, connectors, and power electronics (Volza, 2024).
HS code 8544	
Description	Insulated (including enamelled or anodised) wire, cable; optical fibre cables
Market combinations	India, China, Germany, Switzerland, US, Singapore, Japan
Import trends	Regional sourcing is important: India and China act as large regional buyers and re-export hubs; EU markets demand higher-specification, value-added assemblies (EDB, 2026).
Distribution channels (all products)	<p>B2B OEM / Tier-1 supply chains: Direct contracts with OEMs (appliance makers, industrial equipment, renewables players). Critical for panels, transformers, cable harnesses (EDB, 2024b).</p> <p>Trading houses and distributors: Export via trading houses or distributors who resell to industrial buyers, especially for bulk cables and commodity components (Volza, 2024).</p> <p>Contract manufacturing partnerships: Overseas OEMs contract Sri Lankan firms to produce modules / assemblies; often requires small-series flexibility and strong quality assurance.</p>
Key market-entry and buyer requirements (all products)	<p>Buyers (OEMs, distributors, utilities) typically require the following (meet these to enter EU / US / regional markets):</p> <ul style="list-style-type: none"> • Quality and management systems: ISO 9001 (baseline), and sectoral standards: International Electrotechnical Commission standards for transformers / switchgear, ISO/TS for automotive supply chains, and Institute of Printed Circuits / Underwriters Laboratories standards for assemblies, where applicable • Product and safety certifications: <i>Conformité Européenne</i> marking for products sold in the EU (when applicable), restriction of hazardous substances compliance, Underwriters Laboratories / Electrical Testing Laboratories (for North America) for certain appliances, and specific International Electrotechnical Commission tests for transformers and switchgear • Testing and lab facilities: Impartial test reports (third-party labs), type testing for transformers, insulation tests for cables, and functional acceptance tests for panels • Traceability and supply-chain transparency: Lot traceability for parts, restriction of hazardous substances declarations from component suppliers, and reliable bill-of-materials management • Commercial terms and logistics: Predictable lead times, ability to meet small pilot orders and scale, acceptable payment terms (letters of credit), and professional export documentation <p>Pre-qualification for tenders / buyers: For utilities and engineering, procurement, and construction contractors – supplier pre-qualification, warranty terms, and local service / after-sales capability are often required.</p>

Processed F&B Sector	
HS codes 1602, 1604, 1605	
Description	Preparations of meat, fish, of crustaceans, molluscs, or other aquatic invertebrates
Market combinations	Netherlands, Spain, Japan, US, UK, Middle East, India, Maldives, Malaysia, Australia
Import trends	<ul style="list-style-type: none"> Global demand for meat, dairy and fish is projected to climb steadily over the next decade, driven by rising incomes and urbanisation in middle-income countries (Mishra, 2025) Regionally, the Asian market for canned seafood, coconut products, and bulk ingredients is likely to increase because of proximity and trade ties (Mordor Intelligence, 2024)
HS codes 200911, 200912	
Description	Fruit juices, including grape must; and vegetable juices, unfermented, not containing added spirit
Market combinations	Germany, Maldives, UK, Canada, UAE, Switzerland
Import trends	Premium and value-added products are growing faster than commodity volumes: Global buyers, mainly in the EU, are increasingly paying for organic, clean-label and certified supply chains (Peperkamp, 2025)
HS codes 180620, 180690	
Description	Chocolate and other food preparations containing cocoa
Market combinations	UAE; Bangladesh; Hong Kong, China; US; Singapore
Import trends	<ul style="list-style-type: none"> Growing preference for dark chocolates; sustainability-driven demand for certified cocoa / chocolate (Mordor Intelligence, 2025a) Developed markets (US, Singapore) increasingly demand higher standards (food safety) and traceability but offer the best margins for premium lines
HS code 2202	
Description	Waters, including mineral waters and aerated waters, containing added sugar or other sweetening (plant-based beverages)
Market combinations	US, Canada, Australia, UAE, Maldives, Japan, Oman
Import trends	Health and wellness is a mega trend, accompanied by the rising popularity of plant-based products / beverages. ¹⁵
HS codes 080111, 080119	
Description	Fresh coconuts, desiccated coconuts + value-added coconut products (coconut milk, virgin coconut oil, coco peat, coir fibre)
Market combinations	India, US, UAE, Germany, Oman, Qatar, Switzerland
Import trends	As demand for plant-based and natural products grows, the desiccated coconut market remains poised for further evolution, with sustainability and innovation at its core (International Coconut Community, 2024).
HS codes 210320, 210390	
Description	Sauce and preparations thereof; mixed condiments and mixed seasonings
Market combinations	Maldives, Italy, Australia, Canada, UK, US, Netherlands, Japan
Import trends	<p>Asia-Pacific tended to dominate the sauces, dressings, and condiments market in 2024 (Towards FnB, 2025).</p> <p>Demand in this industry is rising as consumers increasingly prefer convenient home-cooking. Sauces and condiments that simplify meal preparation while enhancing flavour continue to gain popularity. Growing exposure to international cuisines and a strong appetite for spicy foods are further boosting demand. In markets such as India, China, and Japan – where sauces, spices and concentrates, and dressings are integral to daily cooking – these culinary traditions are accelerating overall market growth (Towards FnB, 2025).</p>

¹⁵ Inputs based on the discussions held with the industry representatives in December 2025.

Contd....

HS code 2106	
Description	Food preparations, not otherwise specified (ready-to-eat foods)
Market combinations	US, UAE, Australia, Netherlands, Cyprus, Kuwait, Germany
Import trends	The ready-to-eat food market is growing rapidly, driven by busy lifestyles and the demand for convenient, time-saving meal solutions. These foods – including frozen, chilled, and shelf-stable meals – are especially popular among working professionals, students, and individuals with limited time. Additionally, e-commerce platforms are enhancing accessibility, while cultural preferences and eco-friendly packaging are gaining importance (Indusfood Fresh, 2025).
Distribution channels (all products)	<ul style="list-style-type: none"> • Direct exports to international buyers and importers: Large and established processors often export directly to supermarket chains, specialty food stores, and ethnic food distributors in key markets • Export agents and trading companies: Small and medium-sized processors commonly rely on export agents or trading houses • Overseas distributors and wholesalers: Sri Lankan brands often partner with regional distributors (particularly in diaspora markets) who handle market entry, warehousing, and retail placement • E-commerce and B2B digital platforms: Growing use of online export platforms (e.g., Amazon, Daraz) • Government and trade promotion intermediaries: Channels supported by the EDB and trade missions that link exporters with international buyers through trade fairs and B2B matchmaking events
Key market-entry and buyer requirements (all products)	<ul style="list-style-type: none"> • Food safety and quality systems: Hazard Analysis and Critical Control Points, ISO 22000, Food Safety System Certification 22000, British Retail Consortium Global Standard (for EU/UK retailers), Good Manufacturing Practices for ingredient buyers • Pesticide Maximum Residue Limits compliance and lab testing: Documented testing for pesticide residues (EU/US Maximum Residue Limits), heavy metal limits, and microbiological standards • Traceability and origin claims: Batch / lot traceability and clear origin labelling; provenance claims (single-origin Ceylon tea / cinnamon) need supporting documentation • Certifications for premium markets: Organic, Fairtrade, Rainforest Alliance where relevant • Packaging and labelling: Language requirements, nutritional panels (if applicable), expiry / best-before dates; retail barcodes and shelf-ready packaging • Commercial terms: Certificates of analysis, phytosanitary certificates (where applicable), letters of credit / payment terms, reliable logistics and cold chain for perishable items • Regulatory registration: Some markets require product registration (e.g., Japan's import registrations for certain food additives) or import permits for seafood • Sustainability and social compliance: Growing buyer interest in environmental / social credentials (sustainable sourcing, mainly for EU markets)

CHAPTER 4: DIAGNOSTICS

TRADE LOGISTICS

Colombo's port and surrounding infrastructure must be strengthened to support Sri Lanka's ambition to become a leading logistics and transshipment hub. Colombo is the busiest transshipment port in the Indian Ocean and has operated at more than 90% of capacity since 2021. As volumes grow, existing infrastructure and near-port warehousing have not kept pace, resulting in periodic congestion.

A fragmented terminal footprint increases the need for physical transfers between facilities, adding handling steps and time. Addressing these issues through targeted capacity, automation, e-gates, higher inter-terminal transport throughput, and fit-for-purpose near-port warehousing would unlock efficiency gains.

Automated loading, unloading, and material-handling equipment is limited at container terminals, limiting berth productivity and yard efficiency. The absence of an electronic gate means manual checks at entrances, increasing queues. Inter-terminal trucking averages about 4,500 container moves per day, while 6,500 to 7,000 moves are ideally required for smooth operations.

PoA references: 1.1.1, 1.1.2, 1.1.3

The absence of a functional multimodal logistics chain, and poor interagency coordination, exacerbate inefficiencies.

Seamless transfer of cargo from road to rail or between ports and inland depots does not exist, raising costs and delays. Multimodal integration involving seamless coordination between sea, road, and rail transport is essential to expedite goods movement. Improvements here will prevent bottlenecks and strengthen Sri Lanka's position as a regional logistics hub. Upgrading road networks and enhancing multimodal links around ports will improve transit times.

Current rail and inland waterways transport options remain underdeveloped, with no recent feasibility studies or trials, though Sri Lanka historically had robust inland water transport. There is an over-reliance on road transport for freight in Sri Lanka. Roads carry approximately 97% of freight, which, coupled with underutilised rail and coastal shipping, increases congestion and costs. A potential option could be to explore rail connectivity for container movement to reduce congestion and facilitate exports.

PoA reference: 1.1.3

Warehousing facilities are insufficient both at ports and rural production areas

Warehousing near the port is limited and not designed for rapid turnover. As a result, longer container dwell times in terminals reduce space for transshipment flows. A shortage of temperature-controlled warehouses in and around ports and airports affects an estimated 40% of agricultural exports that

require cold storage.¹⁶ Expanding cold-chain facilities at these locations is essential to preserve the quality of perishable goods, reduce spoilage, and extend product shelf life.

Plug-and-play warehousing models to help SMEs engage in international trade with lower costs and fewer restrictions are needed across the country. The lack of suitable infrastructure for multi-party consolidations and less-than-container-load cargo hampers operational efficiency during adverse weather conditions. SME-dense sectors such as spices and concentrates are particularly impacted. For example, many spice producers store products at home without standard facilities, risking quality and export readiness.

PoA references: 1.1.1, 1.1.4

There is a need to establish and promote privately operated zones under BOI regulations that provide ready-to-use logistics and warehousing facilities, enabling firms to begin operations quickly. Sri Lanka has 14 BOI zones and several Export Processing Zones with infrastructure, but expansion and full private-run logistic park development remain limited. There are few fully operational private logistics zones with turnkey facilities. Land acquisition and site infrastructure development face delays.

PoA reference: 1.1.4

Sri Lanka lacks a comprehensive national strategy for the development of marine and offshore services. Key infrastructure gaps persist, including the absence of dedicated berthing for offshore asset servicing, bonded warehousing for marine and offshore equipment, and integrated marine service zones. In addition, training infrastructure for marine trades remains outdated, with limited capacity in modern technologies such as composite materials, offshore engineering, marine electronics, and green marine technologies.

PoA reference: 1.1.5

Customs inspection facilities are inadequate, contributing to slow examinations and clearance delays, particularly for time-sensitive and perishable cargo. This increases dwell times and raises the risk of spoilage and waste. Progress is under way through the planned establishment of a new Customs inspection centre at Kerawalapitiya under a hybrid public-private partnership model, with the government currently seeking private investors to implement the project (Lanka News Web, 2025).

PoA reference: 1.1.6

High express courier costs from Sri Lanka to Europe and the US remain a major constraint for exporters. Establishing a dedicated express consignments clearance facility, alongside strategic partnerships with courier operators, would streamline end-to-end express flows through faster Customs processing, simplified procedures, and more efficient last-mile coordination.

PoA reference: 1.1.7

Insufficient scanner coverage for exports is resulting in slow export cargo clearance, and security risks. Current scanning capacity is insufficient: it is estimated that 95% of export containers undergo physical scanning, with no export scanning machines available. This is despite the existence of four scanners for imports capable of scanning 600 containers daily, versus peak demands of up to 2,500 containers.¹⁷ The lack of scanning facilities forces reliance on physical inspections with inadequate infrastructure, creating delays and cargo damage risks.

¹⁶ NEDP stakeholder consultations.

¹⁷ Expert interviews with sector stakeholders.

PoA reference: 1.2.1

Implementation of a maritime single window and a port community system to integrate all port terminals needs to be accelerated. Sri Lanka's maritime performance is constrained by fragmented, paper-heavy processes across shipping lines, terminals, Customs, agents, and regulators. Multiple platforms and sequential approvals create duplication, limited visibility, higher compliance costs, and avoidable clearance delays, reducing predictability for port users.

A maritime single window would enable a single, digital submission of all port-call and clearance documents, reducing duplicative reporting across agencies, and accelerating vessel and cargo processing.

Also, Sri Lanka is in the process of implementing a port community system, expected to connect all stakeholders on a digital platform to streamline vessel, cargo, and Customs information flows, reducing congestion and increasing operational transparency (Asian Development Bank, 2020). These reforms need to be expedited so as to improve efficiency and transparency in port operations.

PoA reference: 1.2.2

Green and sustainable logistics are gaining attention, and there is potential to embed solar-powered warehouses and EV fleets to align with global environmental standards and market demands.

Green and sustainable logistics are gaining attention, with calls to embed solar-powered warehouses and EV fleets to align with global environmental standards and market demands. There are some examples of modern logistics campuses with Leadership in Energy and Environmental Design-certified, carbon-neutral warehouses (e.g., EFL 3PL). However, the green transition is in its infancy – there are only a handful of sustainable logistics pilots, and scaling up renewable fleets and modal shifts remains a challenge.

PoA reference: 1.2.3

TRADE FACILITATION

Customs Act modernisation is still pending, while legacy regulations cause inefficiencies in trade facilitation. Customs Ordinance reforms, and amendments to related laws, have been initiated but remain unimplemented. The Customs Ordinance, dating back to 1897, remains largely unchanged, resulting in antiquated inspection processes and procedures such as redundant import cargo checks at inland container terminals. Attempts to modernise the laws have stalled due to political and financial constraints. This outdated legal framework undermines efficiency and innovation in Customs operations, requiring legislative reforms aligned with contemporary trade facilitation standards and international best practices.

There are other key pieces of legislation that need to be updated. These include the Import Export Control Act, Exchange Control Act, Electronic Transaction Act, Direct Merchant Shipping Act, and Sri Lanka Ports Authority Act. These are central to trade facilitation reforms.

PoA reference: 2.1.1

Frictions in raw-material imports limit trade competitiveness. Sri Lanka's regime for importing production inputs remains cost- and time-intensive. Beyond Customs duty, multiple para-tariffs (Port

and Airport Development Levy, Special Commodity Levy, EDB cess, VAT, Social Security Contribution Levy, excise) are levied and often compounded in calculation, raising landing costs and compliance burdens for firms (WTO, 2025). Licensing and other non-tariff requirements, together with multi-agency permits and uneven service performance, prolong clearance and add uncertainty. Although trade-facilitation reforms are underway, outstanding measures and process frictions continue to affect firms' pricing and delivery reliability.

The government is developing a National Tariff Policy to implement a transparent and predictable tariff framework to improve access to affordable, high-quality raw materials.

Beyond tariffs, imports under the BOI scheme for exporters are duty-free for export processing but require company registration and export orientation. Non-BOI exporters can import raw materials under the Temporary Import for Processing scheme, with conditions such as adding over 20–25% value and limits on local release (usually 10%).

Import restrictions on raw materials for plantation crops, especially coconuts and rubber, are driven by pest/disease and producer-protection concerns. However, export sectors have noted that these measures lead to a structural raw-material shortage for value-added exporters and are limiting the export competitiveness of the agriculture sector. As an example, under the prevailing regime, only coconut kernel imports for export processing are allowed, while prohibiting whole nuts, husk and shells. The resulting mismatch between domestic supply and export demand curbs scale, diversification, and investment, despite clear opportunities in higher-value, export-oriented processing.

PoA references: 2.1.2, 2.1.3, 2.1.4

Trade Facilitation Agreement reforms remain high on the agenda. Sri Lanka is a party to the WTO Trade Facilitation Agreement (WTO-TFA) and has notified its commitments under it. Key pending trade facilitation reforms include:

- The National Trade Single Window
- Advance publication and prior notification of trade regulations to support trader planning
- Electronic exchange of Customs declarations
- Electronic application for and issuance of sanitary and phytosanitary certificates
- Introduction of an AEO programme for cross-border e-commerce operators
- Electronic submission of Customs declarations by postal operators and express carriers.

PoA reference: 2.1.5

There is an urgent need to enhance SME awareness and training. Sri Lankan SMEs face challenges understanding regulatory, licensing, and documentation requirements.

As an example, a key challenge is the complexity and frequent ambiguity in product classification, which often leads to incorrect HS code usage, unforeseen duties, shipment delays, and compliance issues. Additionally, overlapping codes and frequent updates to the HS system require importers and exporters to constantly stay informed and possibly seek advance classification rulings, which not all traders are equipped to handle efficiently. Training initiatives on HS code classification can significantly enhance exporters' understanding of proper product categorisation, leading to fewer errors and rejections. Regular workshops and coaching sessions would foster better communication between

Customs officials and exporters, promoting a collaborative approach to resolving issues and streamlining processes.

PoA references: 2.1.6, 2.1.7, 2.1.8, 2.2.8

Process ambiguity limits uptake of the \$3,000 low-value export facility for SMEs and courier exports. Awareness of the \$3,000 export entry fee benefit remains limited, and practical use is further constrained by unclear operational guidance. In particular, exporters and intermediaries lack clarity on the declaration model for consolidated courier shipments, including whether the exporter or the courier files the bulk Customs declaration/export entry and what data must be captured to ensure each SME is identifiable as the exporter of record for proof of export and return shipments. In addition, requirements for destination country summary reporting are not consistently specified or standardised, creating uneven compliance, delays, and limited ability to monitor utilisation.

PoA reference: 2.1.7

Reintroducing the AEO programme can enhance trade facilitation by streamlining Customs processes for compliant businesses. The AEO programme enhances port security and port operations efficiency through trusted trader status. Proper reintroduction with stringent due diligence, regular audits, and risk assessment processes will ensure that certified exporters benefit from expedited procedures, thereby reducing clearance times and fostering trust.

By recognising trusted traders, Customs authorities can focus their resources on higher-risk shipments, thereby minimising the need for physical inspections and expediting the clearance process for compliant operators.

PoA reference: 2.1.9

Ineffective coordination within the National Trade Facilitation Committee is curtailing trade facilitation progress. Sri Lanka's National Trade Facilitation Committee currently operates under a Trade Facilitation Roadmap and Action Plan for 2025–2028 approved by the Cabinet in 2024, involving about 200 public and private stakeholders (Office of the Cabinet of Ministers, 2024); however, progress on trade facilitation commitments has been slow, with only 58% implementation by 2025, hindered by inconsistent funding and limited stakeholder participation.

The National Trade Facilitation Committee, comprising 18 government agencies, plays a key role in trade facilitation but remains ineffective due to poor coordination, lack of accountability, and weak enforcement of decisions. This hampers comprehensive trade reforms and delays implementation of critical facilitation measures. Strengthening the National Trade Facilitation Committee's mandate, equipping it with clear action plans, and granting real decision-making authority would help overcome current fragmentation.

PoA reference: 2.1.10

Implementing an effective dispute resolution mechanism at both the partner level and within Customs operations is important to enhance transparency and operational efficiency in Sri Lanka's export-import processes. There is an absence of a structured and accessible dispute resolution mechanism for Customs-related disputes. Establishing an independent dispute resolution body would provide a formal platform for timely resolution of trade disputes.

There is also a need to establish explicit, legally binding timelines for processing Customs-related complaints. The current system allows investigations and clearances to extend for months without

accountability. The private sector has reported that resulting delays cause extended container demurrage charges and long truck queues at ports, raising costs and reducing competitiveness. Although some agencies publish service standards, these are not consistently met, creating a gap between stated and actual performance. This weakens transparency, undermines institutional credibility, and complicates planning for traders and logistics operators. Introducing clear, enforceable timelines, with publication of performance against targets, would strengthen trust and improve trade facilitation.

PoA reference: 2.1.11

There is a critical need for an NSW. An NSW system for trade facilitation is critical to streamline import and export processes. A single window platform would unify Customs declarations, inspections, and payments, allowing traders to submit documentation just once while enabling agencies to share data electronically.

Sri Lanka is still in the early stages of operationalising an NSW. The lack of integrated systems is currently forcing manual interventions, queues, and repeated checks even at port gates. Exporters currently resubmit the same documents repeatedly over the years for Customs, port, and other clearances, and multiple agencies check cargo and documentation redundantly, contributing to delays.

PoA reference: 2.2.1

A number of NEDP priority sectors include products with strong potential for business-to-consumer (B2C) e-commerce exports, particularly for niche and value-added goods that can reach diaspora and international consumers directly. However, the country's e-commerce ecosystem remains at an early stage of maturity. Developing a dedicated national e-commerce strategy would help position digital trade as a practical conduit for export competitiveness by expanding market access, lowering transaction costs, and enabling more firms to export through online channels.

PoA reference: 2.2.2

Express shipments are recognised as a critical modernisation need for Sri Lanka's international trade and e-commerce competitiveness. Sri Lanka does not currently have legal definitions, dedicated laws, or established procedures for express shipments in Customs regulations. This includes the absence of regulations distinctly separating express/expressed shipments (courier/e-commerce cargo) from regular freight shipments, which is considered a gap compared to international best practices. The World Customs Organization (WCO) and WTO-TFA clearly define expedited/express shipment procedures. These include de minimis value limits, simplified documentation, and clear demarcation between express and general cargo. However, Sri Lanka does not yet have such frameworks in its regulations.

There is an intent¹⁸ to implement an ASY Express module as part of the Sri Lanka Customs upgrade. This module is intended to accommodate the special requirements of express shipments and e-commerce, allowing for faster, simplified, and separate processing in line with WCO and WTO-TFA guidance.

¹⁸ The implementation of express shipment processes (such as ASY Express) is noted as a 'Category C' commitment for Sri Lanka under the WTO-TFA. This means it is recognized as a critical reform area that will take additional time and resources but is prioritized for implementation.

PoA reference: 2.2.3

There is a need to adopt e-signatures/digital signatures. To accommodate varying levels of e-readiness among smaller traders, Customs authorities have not mandated e-signatures. This inclusive, gradual approach supports broad participation but slows the digitalisation of export processes and allows non-standard communication that can delay clearance, particularly for SMEs with limited technology access. A phased rollout with targeted capacity support would help balance inclusivity and faster adoption.

PoA reference: 2.2.4

Weak oversight of cross-border couriers. Fragmented oversight and the presence of unlicensed operators enable fraud, undercut formal trade channels, and expose consumers to poor service. The absence of licensing, minimum service and IT standards, and routine data reporting limits accountability and hampers Customs risk management and revenue protection.

PoA reference: 2.2.5

Risk-based inspection and clearance modernisation is a priority. Inspection and release processes remain insufficiently risk-based, with limited use of export scanning and green-channel treatment for low-risk consignments. As a result, Customs resources are spread too thin, clearance times are unpredictable, and congestion risks increase. Systematic measurement and publication of clearance times is limited, reducing accountability and continuous improvement.

PoA reference: 2.2.6

Limited cargo visibility and weak monitoring of inland clearance. End-to-end visibility of cargo movements and clearance milestones beyond the Port of Colombo remains limited. Current systems provide only partial status information and do not consistently track inland movements, handovers, and time-to-release across corridors and inland clearance points. This weak monitoring reduces accountability, constrains risk-based interventions, and makes it difficult to identify bottlenecks. Efforts are ongoing to develop an electronic cargo tracking system.

PoA reference: 2.2.7

Unclear return-shipment rules and weak traceability for consolidated parcels are interlinked challenges. Current Customs systems do not allow tax-free returns of exported goods unless very strict proof can be provided, which is difficult for consolidated express or courier shipments. Exporters currently face difficulty proving the export status of goods within consolidated e-commerce shipments, leading to duty liabilities on returns and occasional double taxation. Limited end-to-end tracking and unclear return regulations raise costs and deter SMEs. Participants recommended system upgrades that link outbound and inbound references for each item and the publication of clear, standardised return and re-import procedures to streamline processing, reduce disputes, and support e-commerce growth.

PoA references: 2.1.9, 2.2.9

Limited transparency and standardisation of maritime logistics fees and documentation requirements. Port and shipping-related fees, surcharges, and ancillary charges are not presented through a single, comprehensive, and regularly updated online schedule. Instead, information is fragmented across operators and channels, sometimes unavailable, and often not updated in a consistent manner. The absence of clear guidelines on shipping and ancillary charges, aligned with international standards,

further reduces predictability and weakens coordination across shipping lines, agents, terminals, freight forwarders, and public agencies.

PoA reference: 2.2.10

There is a need to make targeted regulatory adjustments to the “Hub Operations/Commercial Hub” and related bonded/free-port regimes, to encourage FDI in NEDP priority sectors. The Hub Operations framework is primarily designed for bonded, re-export logistics and permits only limited processing (for example, repacking and relabelling). As a result, goods handled under this model may not meet FTA rules of origin, which limits investors’ ability to use Sri Lanka as a production base to access preferential tariffs in FTA partner markets. NEDP sectors accordingly require greater policy and regulatory flexibility to allow deeper value addition under these schemes, so exports can qualify for FTA preferences.

PoA reference: 2.2.11

TRADE FINANCE, BUSINESS, AND INVESTMENT CLIMATE REFORM

Export credit guarantees and insurance schemes in Sri Lanka cover only a small share of export transactions. Coverage is estimated at 2–4%, significantly below the international average of 10–12% (Verité Research, 2015). Uptake remains low due to limited awareness among SMEs, inadequate promotion of available schemes, and the absence of clear and accessible support channels for exporters.

Borrowing costs remain relatively high, and bank lending to SMEs remains risk-averse. Credit access is constrained by stringent collateral requirements and limited use of alternative risk-mitigation instruments. Supply-chain finance, receivables-based lending, invoice factoring, and export guarantee schemes remain at early stages of adoption, with low participation. New digital platforms (e.g., Tradegate) face awareness and onboarding challenges, limiting scale.

PoA references: 3.1.1, 3.1.4, 3.1.7, 3.1.9, 3.1.10

Low financial literacy and limited awareness of available government and financial sector support schemes constrain SME access to trade finance, particularly for exporters. Awareness gaps are evident across multiple areas, including export finance and loan programmes offered by EDB and partner banks, supply-chain financing instruments, export credit guarantee and insurance schemes, and Central Bank-led financial literacy initiatives. Information on SME grants and loan programmes is often fragmented, limiting SME uptake.

PoA references: 3.1.2, 3.1.3, 3.1.5, 3.1.6

Credit bureaus and credit scoring systems remain underutilised in SME financing. Their use is largely limited to basic credit checks rather than as tools to expand access to unsecured or cash-flow-based lending. Banks continue to rely heavily on collateral, reflecting limited integration of credit bureau data and alternative credit information into lending decisions. First-time borrowers and SMEs with limited formal financial histories face restricted access to finance. While a credit bureau framework exists, it is not yet central to SME credit assessment practices.

PoA reference: 3.1.8

The removal of the Simplified VAT scheme is expected to affect SMEs disproportionately, as they typically operate with tight cash flows and limited access to working capital. Under the scheme,

suspended VAT payments helped mitigate liquidity constraints and refund delays. With the scheme's abolition and the requirement for upfront VAT payments, SMEs may face increased cash-flow pressures if VAT refunds are not processed in a timely and predictable manner. The transition therefore requires a robust and efficient VAT refund system to avoid a recurrence of unpredictable refund delays.

PoA reference: 3.2.1

Licensing and basic business registration processes remain fragmented and slow. Businesses are required to interact with multiple government agencies, each with separate procedures, documentation requirements, and timelines. The absence of integrated processes increases transaction costs, delays business entry and expansion, and discourages formalisation, particularly for smaller firms and new exporters.

PoA references: 3.2.2, 3.2.3.

Awareness and understanding of the Rules on Repatriation of Export Proceeds issued under the Central Bank of Sri Lanka Act, No. 16 of 2023, remain limited among exporters. SMEs and new exporters in particular lack clarity on compliance obligations, timelines and reporting procedures.

PoA reference: 3.2.5

Sri Lanka's FDI performance has weakened since 2018, limiting technology transfer and the expansion of export-oriented sectors. Access to land remains a key bottleneck. Although more than 80% of land is state-owned, only about 0.04% is allocated to industrial zones (World Bank, 2017). These challenges are compounded by fragmented land governance, policy uncertainty, the absence of a streamlined investment framework, and partial alignment between national export priorities and designated investment priority sectors.

PoA references: 3.3.1, 3.3.2, 3.3.3, 3.3.4

TRADE PROMOTION AND MARKET LINKS

Trade promotion for SMEs remains limited. Access to timely market intelligence and tailored advisory support remains uneven for SMEs. Training programmes by EDB and other institutions are valued but may not yet reach all potential beneficiaries or be offered at sufficient frequency. Structured engagement between exporters and overseas missions is relatively recent, and coverage gaps in some markets limit on-the-ground assistance. These factors, combined with reliance on a few key buyers, can constrain firms' ability to proactively identify and develop new export opportunities.

PoA references: 4.1.1, 4.1.2

Limited value-chain diagnostics and sector roadmaps constrain targeted export competitiveness interventions. Several NEDP priority sectors – including high-potential and emerging segments such as rubber, spices, and EV-related value chains – remain constrained by fragmented production and weak links across upstream inputs, processing, logistics, trade finance, investment readiness, and trade promotion. Current sector planning does not consistently map constraints and support needs across the full value chain, which limits the ability to prioritise the most binding interventions, and to sequence reforms and investments. Dedicated value-chain studies and linked sector export strategies

are needed to identify bottlenecks and entry points; align stakeholders around a shared competitiveness roadmap; and direct resources towards priority investments, skills development, trade promotion, and enterprise capacity-building that can lift export performance.

PoA reference: 4.1.3

Limited and inconsistent export incentive schemes. Export incentive schemes such as rebates, guarantees, trade missions, and exhibition support have been introduced at different times, but implementation has not always been continuous or predictable from the perspective of firms. Budgetary and administrative constraints have affected scale, regularity, and awareness. This can reduce the signalling effect of incentives for investment and upgrading. There is therefore a need to introduce new and/or streamline existing schemes for the benefit of exporters and sector associations in terms of trade promotion support.

PoA references: 4.1.4, 4.1.5

Inadequate country and sector branding. Stakeholders note that Sri Lanka's country and sector branding remains fragmented, with varying use of labels such as "Sri Lanka" and "Ceylon", and limited coordination across sectors. Several agencies and industries run their own campaigns, yet there is no fully resourced and unified brand architecture to anchor these efforts. This can dilute visibility and consistency in overseas markets. A more coherent national and sector branding framework could better signal quality, reliability, and sustainability to international buyers.

PoA references: 4.1.6, 4.1.7, 4.1.10

Exporter capability-building can be further scaled and tailored to move SMEs from awareness to sustained market access in NEDP priority sectors. Exporter capability-building remains fragmented and limited in reach, with insufficient sector and region-specific tailoring, and inadequate follow through from awareness to practical export marketing planning and facilitated market access. A structured, staged exporter readiness programme is needed to move firms systematically from intent to execution, and increase the pipeline of export-ready SMEs in NEDP priority sectors. Scaling up the Sri Lanka Export Excellence Initiative and developing new sector-specific exporter readiness programmes will help expand the pipeline of export-ready SMEs in NEDP priority sectors.

PoA references: 4.1.8, 4.1.9

Limited use of digital trade and innovative promotion mechanisms. Digital trade and e-commerce offer important opportunities to reach new buyers and niche markets, yet these tools are still at an early stage of uptake in many sectors. Stakeholders note that while some firms are active on online platforms, many SMEs have limited visibility and digital marketing capabilities. National initiatives on e-commerce and online marketplaces have had mixed results. Strengthening digital skills, logistics solutions, and trusted national or sectoral online channels could help expand Sri Lanka's global reach.

PoA reference: 4.1.11

Institutional capacity development for EDB is a key priority. EDB is the government's principal trade promotion organisation mandated to lead national export development and promotion efforts. It provides valuable services to exporters and plays a central role in coordinating trade promotion initiatives. However, the evolving demands of export competitiveness including the need for more sophisticated market intelligence; stronger investor and buyer links; and support in emerging areas such as sustainability, standards compliance, and digital trade require a further strengthening of EDB

technical and financial capacities. A structured institutional capacity assessment will help identify priority needs and guide targeted measures to enhance the EDB's effectiveness as the lead export development agency.

PoA references: 4.2.1, 4.2.6

Essential need to improve coordination between EDB, BOI and the network of commercial attachés (via the Ministry of Trade, Commerce, Food Security, and Co-operative Development). The export promotion landscape includes multiple institutions with complementary mandates, such as EDB, the Department of Commerce, investment and tourism bodies, and sector boards. While collaboration does occur, stakeholders point to opportunities for stronger alignment across market intelligence, trade fair participation, branding, and investor outreach. Strengthening coordination across these actors is increasingly important to ensure exporters receive coherent, timely and well-targeted support in priority markets. Stakeholder insights have consistently pointed to the fact that investment promotion and export promotion are not sufficiently linked in practice, resulting in missed opportunities to connect exporters with joint-venture partners, buyers, and current market intelligence. More structured collaboration can streamline in-market support and strengthen export-related investment and buyer links in priority markets.

PoA references: 4.2.2, 4.2.6

Sri Lanka's network of commercial attachés/commercial counsellors is considered thin and inadequate to serve the emerging needs of Sri Lanka's export base. Sri Lanka's network of missions and honorary consuls provides broad geographic coverage, yet commercial representation and trade promotion capacity vary by location. A number of key commercial attaché posts are open, and some are affected by resource constraints or limited specialised trade expertise. Representation tends to be stronger in traditional partner markets, while certain emerging destinations with growing trade links have more limited coverage. Calibrating the network and support tools offers scope to better match representation with evolving export priorities.

PoA references: 4.2.3, 4.2.4

SMEs are not positioned to invest in branding/market development. SMEs face a multitude of constraints in dedicating resources to sustained international branding or structured market development. Participation in trade fairs and missions often relies on project-based or institutional support rather than firm-level budgets. As a result, a significant share of exports is channelled through a limited number of established buyers or intermediaries. This model has served to maintain markets, but it can limit diversification, value capture, and the emergence of distinctive Sri Lankan SME brands.

PoA reference: 4.1.5

International chambers of commerce in Sri Lanka can offer significant export promotion and market intelligence support. EDB, international chambers, and business councils based in Sri Lanka (e.g., AmCham, EU Chamber and bilateral chambers) maintain valuable networks and market knowledge that can support exporter market entry and partner identification. Stakeholder consultations indicate scope to strengthen and institutionalise these relationships so they are more systematic, predictable, and aligned with priority markets and sectors. More regular joint engagement, structured information-sharing and coordinated B2B matchmaking can help exporters access market intelligence, buyer links, and potential commercial partners in target countries more effectively.

PoA reference: 4.2.7

There is a need to expand and deepen FTAs. Sri Lanka's existing FTAs provide useful market access but remain narrower and shallower than those of some regional peers, as noted in earlier sections. Coverage of key emerging markets is limited, and provisions on services, investment, digital trade, and standards recognition are still evolving. The country is not part of large regional arrangements such as the Regional Comprehensive Economic Partnership, which can influence investor perceptions and value-chain integration. A carefully sequenced agenda to expand and deepen FTAs could support diversification and reinforce domestic reform efforts.

PoA reference: 4.2.8

QUALITY MANAGEMENT, STANDARDS, AND SUSTAINABILITY

Outdated policy and weak governance of the national quality system. Sri Lanka's National Quality Policy (2016) is no longer aligned with evolving global requirements, particularly on sustainability, ESG, and modern quality-management practices. Core governance mechanisms, including the National Quality Council, have not been operationalised, resulting in fragmented oversight and limited strategic direction.

PoA reference: 5.1.1

Insufficient institutional capacity and financing for quality infrastructure. Key quality institutions face persistent shortages of skilled technical staff; limited laboratory capacity; and weak, ad hoc financing. Limited investment in equipment, laboratories, and accreditation systems reduces the ability to deliver timely, internationally accepted testing and certification services, particularly for emerging and higher value-added export sectors.

PoA references: 5.1.2, 5.1.3, 5.1.5

Fragmented coordination across quality institutions. While the Sri Lanka Standards Institution; Sri Lanka Accreditation Board; and the Measurement Units, Standards and Services Department actively implement their mandates, coordination remains informal and inconsistent. Overlapping responsibilities and limited structured dialogue weaken policy coherence, slow implementation, and create gaps in standards adoption and enforcement, undermining exporter confidence in the quality system.

PoA references: 5.1.1, 5.1.4

Limited SME awareness and uptake of standards, certification, and ESG requirements. Many SMEs lack clear, practical understanding of applicable standards, certification pathways, and available support. Information gaps persist along value chains, with producers often unclear on both domestic requirements and evolving international standards, including ESG and sustainability obligations. Existing outreach and training efforts are fragmented and insufficiently tailored, increasing non-compliance risks and missed market opportunities.

PoA references: 5.1.4, 5.1.6

Low visibility and utilisation of accredited conformity assessment services. Private-sector awareness of domestically available accredited testing, inspection, and certification services remains limited, particularly among SMEs. Accredited conformity assessment services are published on the websites of conformity assessment bodies and on the Sri Lanka Accreditation Board website; however, as accreditation is voluntary in Sri Lanka, this information gap persists.

PoA reference: 5.1.6

Weak alignment with international standards and limited recognition of certifications. The pace of aligning national standards with international and regional norms is insufficient. As a result, certifications issued locally are not always recognised by importing markets, forcing exporters to obtain duplicate certifications overseas. The absence of mutual recognition arrangements further exacerbates costs and reduces competitiveness.

PoA references: 5.1.7, 5.1.8

ESG and due diligence requirements are advancing faster than the national framework. International regulations, particularly in key markets such as the EU and Australia, increasingly require proof of compliance with environmental, labour, and human-rights standards along the supply chain. Earlier export strategies did not systematically address ESG, resulting in unclear institutional roles, fragmented guidance, and limited exporter preparedness.

PoA reference: 5.2.1

Climate commitments are not integrated into export policy and sector strategies. Sri Lanka's NDC 3.0 for 2026–2035 sets ambitious targets for climate action, such as a 33.9% reduction in greenhouse gas emissions from the electricity sector, and maintaining 70% renewable energy in electricity generation from 2030 onwards (Ministry of Environment, 2025). However, these sustainability targets are not currently reflected in export-related targets. There are no structured mechanisms to assess climate and sustainability risks along export value chains, or to integrate sustainability requirements into export compliance roadmaps for exporters.

PoA references: 5.2.5, 5.2.8, 5.2.10

Regulatory and fiscal frameworks discourage circular economy business models. Circular value chains are constrained by tax treatment that penalises waste reuse; restrictions on importing secondary materials; fragmented oversight of material flows; and the absence of incentives for circular enterprises. Existing policies continue to limit investment in recycling, upcycling, and resource recovery.

PoA reference: 5.2.3

Firm-level understanding of ESG standards and domestic requirements is limited. Producers and exporters face information gaps on applicable international ESG standards and Sri Lanka's own environmental and social requirements. Many SMEs lack the technical knowledge, tools, and advisory support to interpret complex ESG requirements and translate them into practical, value-chain-specific guidance for firms.

New requirements such as the EU Deforestation Regulation and IFRS S1/S2 demand traceability systems, climate reporting, and third-party verification. SMEs generally lack the awareness, technical capacity, and financial resources to comply, and there is no coordinated national approach to guidance, certification alignment, or traceability support.

PoA references: 5.2.4, 5.2.6, 5.2.7

Certification and auditing costs constrain SME compliance and market access. Anecdotal evidence gathered via stakeholder consultation suggests that each audit can exceed \$750 and often lasts more than two days, making regular certification prohibitively expensive. Multiple audits and limited international recognition of local certifications increase compliance costs, which are

disproportionately burdensome for SMEs. The absence of cost-sharing or targeted support mechanisms reduces certification uptake and limits assurance coverage across export sectors.

PoA references: 5.2.2, 5.2.9

SKILLS DEVELOPMENT, ENTREPRENEURSHIP AND INNOVATION

Sri Lanka's TVET and skills system's alignment with industry demand remains limited. Skills mismatches persist between TVET providers, higher education institutions, and industry, particularly in export-oriented and higher value-added sectors. Employer involvement in curriculum design, training delivery, and assessment remains uneven.

Accreditation and certification processes are inconsistent, and employer confidence in qualifications varies. Public funding for TVET is limited, constraining investments in instructor training, equipment, and quality assurance. Uncompetitive remuneration structures affect the ability to attract and retain qualified trainers.

Sri Lanka Accreditation Board accreditation is not mandatory, and enforcement mechanisms are weak. Limited market surveillance and the absence of penalties for non-accredited providers reduce incentives for accreditation and contribute to variable training quality across institutions.

PoA references: 6.1.1, 6.1.2, 6.1.3, 6.1.4

Sri Lanka's entrepreneurship ecosystem is fragmented across provinces, with overlapping public SME support functions and weak coordination across institutions. Agencies like the Industrial Development Board, the National Enterprise Development Authority, and the Small Enterprises Development Division deliver similar services in enterprise training, advisory support, and outreach, reducing efficiency.

The absence of a common national SME definition across agencies has led to fragmented databases and inconsistent targeting of support. Regulatory requirements and compliance costs remain burdensome for small enterprises, particularly outside major urban centres. Information on support schemes and regulatory requirements is not consistently accessible to smaller or regional firms, limiting participation in export-oriented entrepreneurship.

PoA references: 6.2.1, 6.2.2

Sri Lanka's innovation system is at an early stage, with low R&D intensity and limited commercialisation outcomes. Research priorities and curricula are not consistently aligned with export and technology upgrading needs. Public and private investment in R&D remains modest, and links between universities, research institutions, and industry are not systematic.

PoA references: 6.3.1, 6.3.9

Institutional capacity for IP management remains limited. Awareness of IP protection among innovators, universities, and exporters is low, and access to advisory support is uneven. IP registration processes are perceived as slow, reflecting staffing constraints and incomplete digitisation. Universities and public research institutions prioritise publications over patenting and commercialisation, limiting the protection and market uptake of innovations.

PoA references: 6.3.4, 6.3.5, 6.3.6, 6.3.8

The lack of a sustained coordination mechanism for GI protection, following the discontinuation of the GI Working Group after the end of donor funding support, has slowed the identification and registration of Sri Lankan export products with GI potential.

PoA references: 6.3.2, 6.3.3

Early-stage financing for innovation-driven and capital-intensive activities is limited. Access to risk capital at proof-of-concept and commercialisation stages remains constrained. Existing incubators and accelerators have limited funding and weak links to larger domestic and international capital sources.

PoA reference: 6.3.7

CHAPTER 5: NEDP GOVERNANCE AND IMPLEMENTATION MANAGEMENT FRAMEWORK

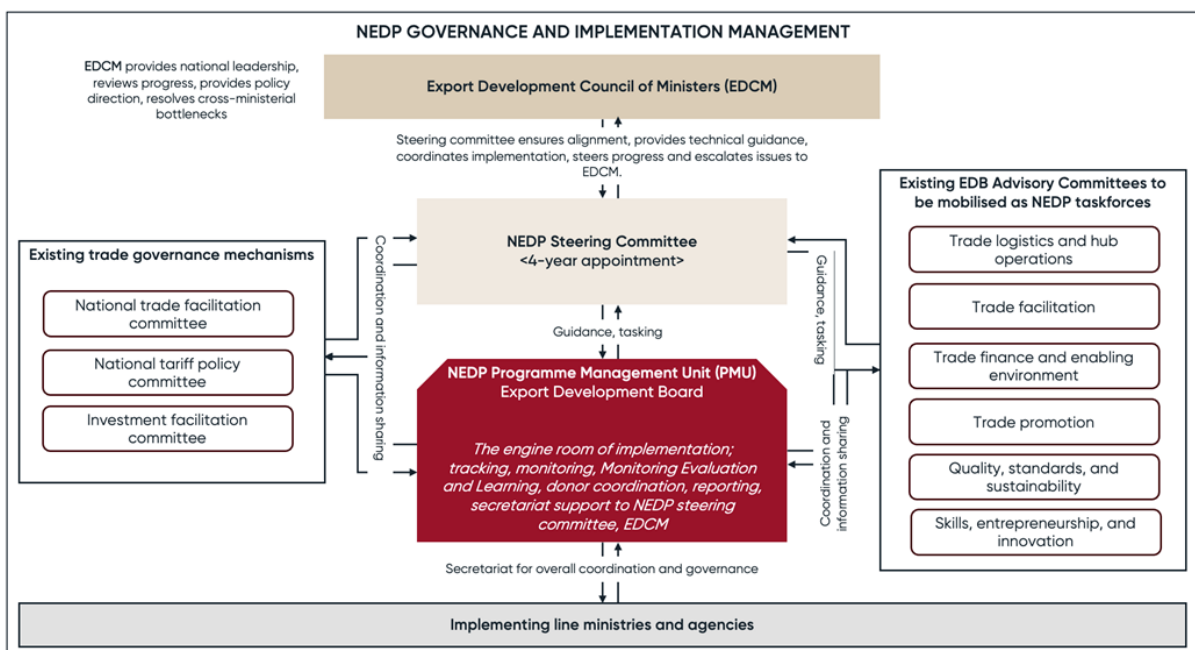
Institutional Anchoring and Legal Framework

The NEDP will be formally anchored under the government’s trade and export development agenda. Export competitiveness necessitates a unified, whole-of-government approach because it spans the mandates of multiple ministries, government agencies, regulatory bodies, industry associations, and private-sector organisations. As a result, a robust structure for public-private collaboration is critical to meet the national ambitions.

The governance framework for implementing NEDP priorities emphasises collective ownership, clear institutional mandates, efficient resource utilisation, and strong accountability, ensuring that all stakeholders across government and industry work collaboratively to deliver results. The governance mechanism comprises the following components.

The Export Development Council of Ministers (EDCM) established under the Sri Lanka Export Development Act, No. 40 of 1979, will provide strategic oversight for NEDP implementation. It is chaired by the President and comprises leadership from key economic ministries (trade, finance, industry, ports, agriculture, etc.). It is responsible for setting and coordinating national export policy, resolving cross-ministerial bottlenecks, and steering the country towards its export targets through the formulation and implementation of export development policies and programmes. In relation to the NEDP, the EDCM will be the apex body that will provide national leadership, review overall progress, endorse major policy directions and intervene to resolve high-level bottlenecks affecting implementation.

Figure 9: NEDP Governance and Implementation Management Framework



The NEDP Steering Committee will provide technical expertise and oversight support to the EDCM, with a *four-year appointment* cycle. The Steering Committee will ensure technical alignment, drive interagency coordination, and escalate issues requiring high-level attention to the EDCM. Its members will comprise senior officials from implementing agencies, as well as representatives from the private sector and relevant existing trade-governance committees, and NEDP task forces, enabling a more structured whole-of-government approach to implementation.

Implementation Arrangement

Implementation will be guided by the NEDP PoA organised around the NEDP's strategic objectives and priority sectors. The Steering Committee, supported by the NEDP secretariat, will facilitate the preparation of annual workplans that assign clear responsibilities, timelines, and resource needs for each action at the institutional, departmental, and individual officer levels

To aid implementation, the NEDP will adopt a strengthened working-group structure consisting of **task forces aligned to the NEDP strategic objectives**: (1) trade logistics and hub operations; (2) trade facilitation; (3) trade finance and enabling environment; (4) trade promotion; (5) quality, standards, and sustainability; and (6) skills, entrepreneurship, and innovation. The EDB Advisory Committees that are already empowered via the EDB Act will be leveraged and expanded to play the role of the task forces. These task forces will comprise nodal officials from the line agencies with technical know-how, private-sector representatives, and technical experts. Each task force will manage day-to-day coordination, monitor progress, and ensure timely implementation of the PoA.

NEDP Secretariat – Programme Management Unit

In addition to the EDCM and the Steering Committee, a dedicated NEDP Project Management Unit will be established within EDB, and will serve as the engine room of the NEDP. It will manage day-to-day functions such as preparing meetings, generating progress reports, mobilising resources, coordinating the delivery of measures, and monitoring implementation. It will provide secretariat support to the both the steering committee and the EDCM. The Project Management Unit will also maintain close coordination with existing national mechanisms, including the National Trade Facilitation Committee, National Tariff Policy Committee, Investment Facilitation Committee and EDB sector advisory committees to ensure coherence and avoid duplication across the broader trade governance landscape. The Project Management Unit will be staffed with select EDB officials, project-based personnel and, where needed, gazetted recruitment.

Monitoring, Evaluation and Learning

A concise results framework will track progress against NEDP objectives and implementation targets drawn from the PoA. A web-based monitoring and evaluation tool will be deployed to facilitate the systematic tracking of progress, accessible to all accountable entities to update the status of actions. The tool will provide report generation, dashboards, and real-time tracking to support evidence-based decision-making and timely course correction. The Steering Committee (supported by the NEDP secretariat) will compile periodic progress reports for the EDCM, highlighting achievements, delays, and required policy decisions. Annual and mid-term reviews will be used to adjust actions, update

baselines and targets where needed, and incorporate lessons learned, ensuring that the NEDP remains a living framework rather than a static document.

Resource Mobilisation

Implementation of the NEDP will be supported through the alignment of domestic budget allocations, public investment programmes, and targeted use of public-private partnerships and development partner financing. The Steering Committee and EDB will work with the Ministry of Finance, Planning and Economic Development, and relevant agencies to identify priority investments and reforms that require dedicated funding. The capacity-building needs of key institutions will be assessed systematically, with tailored programmes to strengthen the analytical, regulatory, enforcement, and coordination capacities required for effective delivery of NEDP actions. Regular donor roundtable discussions will be conducted to keep development partners engaged and informed.

Principles for NEDP Governance and Implementation

The governance and implementation of the NEDP will be guided by a clear set of principles:

- **National ownership and leadership.** The NEDP will be led by the Government of Sri Lanka, anchored in national policy frameworks and coordinated through the EDCM and the Steering Committee, with clear mandates for all institutions.
- **Private sector-driven and market-responsive.** Exporters, SMEs, investors, and value-chain actors will have a central role in shaping priorities, monitoring implementation, and identifying constraints, ensuring that actions respond to real market opportunities and challenges.
- **Whole-of-government coordination.** Ultimately, the success of the NEDP 2026–2030 will depend on how effectively it harnesses existing coordination and implementation structures. Close coordination with existing trade-related mechanisms will be maintained. These include the National Trade Facilitation Committee, National Tariff Policy Committee, and Investment Facilitation Committee, as well as sectoral advisory committees established under the auspices of EDB.
- **Inclusiveness and regional balance.** Implementation will seek to broaden participation in export growth, including SMEs, women and youth-led enterprises, and regions outside the Western Province, so that benefits are more widely shared.
- **Transparency and accountability.** Progress and challenges will be communicated regularly through structured reporting and stakeholder dialogue.

Kickstarting NEDP Implementation in 2026

Kickstarting the NEDP will involve implementation along different dimensions. The natural and foundational starting point for commencing implementation will be the governance and implementation management structure, followed by accelerated reform of trade logistics, trade facilitation, trade promotion, and the business environment. The following section outlines the primary thrusts for 2026 (i.e. Year 1 of NEDP implementation).

The first critical step is to establish a clear governance structure for NEDP implementation. This involves formalising the role of the EDCM as the high-level steering committee and the NEDP Technical Committee as the main technical working group, supported by a dedicated NEDP secretariat housed

within the EDB. Secretariat operations will be financed through the national budget and, where appropriate, development partner support.

An implementation management mechanism will be put in place with three core components.

- First, detailed terms of reference will be prepared for the Technical Committee and the NEDP secretariat, and responsibilities for PoA activities will be assigned to lead agencies down to department and officer level, ensuring clear accountability. These roles and priorities will be agreed through a series of inception workshops at the outset of implementation.
- Second, a web-based tracking and reporting tool will be deployed to log progress on PoA activities. Managed by the NEDP secretariat, and fed by implementing agencies, the tool will be publicly accessible to support transparency.
- Third, a targeted capacity-building programme will be implemented for the secretariat so, it can operate effectively from the start, complemented by a sensitisation campaign to raise awareness of the NEDP across public-sector entities.

Export promotion efforts will be significantly accelerated. This is non-negotiable given the ambitious export targets set for 2030. Trade missions to priority markets, increased visibility through participation in international trade fairs and exhibitions, and stronger public sector stewardship in promoting Sri Lankan products abroad will all be scaled up. In parallel, investor and buyer missions will be organised in Sri Lanka to connect foreign partners with local firms, showcase sector strengths, and facilitate concrete deals. Together, these measures will help deepen existing markets, open new ones, and position Sri Lanka more prominently in RVCs and GVCs. In parallel, awareness regarding export promotion schemes will be improved among the private sector.

CONCLUSION

Sri Lanka is at a critical juncture to reorganise its exports and align with the rapidly changing global landscape. Experience from successful exporting nations demonstrates that bold, system-wide reforms are required that modernise trade processes, strengthen standards, and deepen integration into RVCs and GVCs. The NEDP is purposefully forward-looking, absorbing these lessons and transitioning Sri Lanka to a more diverse, innovative, and resilient export-oriented economy.

The success of the NEDP will rest entirely on its implementation. The task ahead demands both a whole-of-government and whole-of-nation approach, where the private sector also plays a decisive and continuous role in implementation of the NEDP PoA. The NEDP provides a robust governance and implementation framework to ensure that the PoA is coordinated, prioritised and driven to completion. The EDCM will provide strategic direction and resolve interagency bottlenecks, supported by the NEDP Steering Committee to ensure policy alignment and technical coherence across agencies. The EDB-hosted NEDP Project Management Unit will operate as the engine room for execution, monitoring, donor coordination, and reporting. The NEDP framework also proposes establishing task forces for each thematic priority area, which will bring together government institutions, private-sector leaders, and technical experts to drive implementation.

A key takeaway from the previous export strategy is that export development cannot occur in isolation. To achieve scale, sophistication, and long-term competitiveness, Sri Lanka must deliberately align its investment, industrial, and skills policies with the export strategies. The NEDP, when combined with investment climate reforms, will unlock the productive capacity and technology needed to propel the new export sectors. Encouragingly, the government has already signalled its commitment by allocating LKR250 million in the most recent budget to support export promotion and initial NEDP rollout, reflecting early momentum.

Strategic Plan of Action

Strategic Objective 1: Position Sri Lanka as a regional centre of excellence for logistics and integrated hub operations.

Action	Priority	Sectors	Indicators	Baseline – 2025	Targets – end 2030	Lead implementing agency	Supporting actors
Sub objective 1.1: Strengthen port infrastructure and multimodal connectivity to position Sri Lanka as a competitive regional logistics and hub operations centre.							
1.1.1. Update the National Port Master Plan for Colombo Port to: <ul style="list-style-type: none"> Align port infrastructure, logistics capacity, and governance reforms with emerging priorities Address congestion, improving intermodal connectivity Integrate green and digital port development measures. 	High	All goods sectors	<ul style="list-style-type: none"> Status of National Port Master Plan 	<ul style="list-style-type: none"> National Port Master Plan launched in 2019 (open term) 	<ul style="list-style-type: none"> Plan revised and adopted (18 months) 	<ul style="list-style-type: none"> Sri Lanka Ports Authority Ministry of Ports, Shipping and Civil Aviation 	<ul style="list-style-type: none"> Board of Investment Ministry of Finance, Planning and Economic Development Ministry of Fisheries
1.1.2. Expand and modernise container handling and related infrastructure at Colombo Port. Introduce automated material handling equipment at container terminals for faster and safer operations.	High	All goods sectors	<ul style="list-style-type: none"> Operation of: <ol style="list-style-type: none"> East Container Terminal CICT WCT-I WCT-II Construction of Western Breakwater 	<ul style="list-style-type: none"> Partial operation while still under construction Fully operational Partial operation while still under construction Detailed design works is in progress Detailed design works are in progress 	<ul style="list-style-type: none"> Fully operational Fully operational Fully operational Under construction Under construction 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation 	<ul style="list-style-type: none"> Sri Lanka Ports Authority Board of Investment Ministry of Finance, Planning and Economic Development Ministry of Digital Economy Sri Lanka Customs
1.1.3. Undertake feasibility studies to improve multimodal connectivity between ports, airports, rail and inland waterways. Based on results, prepare investment-ready multimodal transport plans (including public-private partnership options) to guide integration of the connected transport system and ensure efficiency in switching between multimodal transport.	High	All goods sectors	<ul style="list-style-type: none"> Feasibility studies completed on multimodal connectivity between ports, airports, rail and inland waterways Status of national multimodal connectivity plan based on the feasibility study results 	<ul style="list-style-type: none"> No recent feasibility studies or trials 	<ul style="list-style-type: none"> Feasibility study / studies completed and validated Multimodal connectivity plan approved and in use as an investment guidance tool (2027) 	<ul style="list-style-type: none"> Ministry of Transport, Highways, and Urban Development 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation Airport and Aviation Services Sri Lanka Ports Authority Road Development Authority Sri Lanka Railways Sri Lanka Land Development Corporation

Contd....

Action	Priority	Sectors	Indicators	Baseline – 2025	Targets – end 2030	Lead implementing agency	Supporting actors
1.1.4. Set up and promote privately run integrated logistics zones under Board of Investment rules to offer ready-to-use, plug-and-play logistics and warehouse facilities, including multi-user facilities to provide temperature-controlled storage.	High	All goods sectors	<ul style="list-style-type: none"> Privately run logistics and warehouse zones established under the Board of Investment 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> By 2030, at least two new Board of Investment-compliant logistics and warehouse zones fully operational 	<ul style="list-style-type: none"> Board of Investment 	<ul style="list-style-type: none"> Sri Lanka Ports Authority Ministry of Ports, Shipping and Civil Aviation
1.1.5. Develop a 10-year National Marine and Offshore Services Industry Blueprint to guide all subsequent marine sector investments and policy decisions. The Blueprint shall define strategic market positioning, assign specialised roles to each major port (Trincomalee, Hambantota, Colombo, Kankesanthurai), identify required infrastructure investments, establish regulatory frameworks, and create a detailed implementation roadmap.	High	Marine-based industries	<ul style="list-style-type: none"> Status of Blueprint 	<ul style="list-style-type: none"> No Blueprint in place 	<ul style="list-style-type: none"> Blueprint completed within 12 months 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation 	<ul style="list-style-type: none"> Sri Lanka Ports Authority Board of Investment Export Development Board Ministry of Defence Sri Lanka Navy Ministry of Industry and Entrepreneurship Development
1.1.6. Establish a Customs inspection centre	Medium	All goods sectors	<ul style="list-style-type: none"> Customs inspection centre operationalised 	<ul style="list-style-type: none"> In-progress initiative to establish a Customs inspection centre at Kerawalapitiya (public-private partnership), now acquiring land 	<ul style="list-style-type: none"> Establish the inspection centre in fully operational mode 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation Sri Lanka Ports Authority
1.1.7. Establish a dedicated express consignments clearance facility and develop strategic partnerships with courier operators to streamline end-to-end express delivery services (including Customs and last-mile processes).	Medium	Express shipment in NEDP sectors	<ul style="list-style-type: none"> Status of express export terminal Annual value of B2C e-commerce exports 	<ul style="list-style-type: none"> No dedicated facility facilitating express shipments 	<ul style="list-style-type: none"> By 2030: express consignments clearance facility Value via express channels at least doubled 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> Airport and Aviation Services Sri Lankan Airlines Sri Lanka Customs Department of Posts

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Action	Priority	Sectors	Indicators	Baseline – 2025	Targets – end 2030	Lead implementing agency	Supporting actors
Sub objective 1.2: Build an efficient, green logistics ecosystem.							
1.2.1. Install / operationalise new scanners – at the port and airport – dedicated to export cargo, and upgrade existing scanner capacity to ensure efficient, risk-based Customs inspection processes that reduce clearance times.	High	All goods sectors	<ul style="list-style-type: none"> Number of scanners operational for exports clearance 	<ul style="list-style-type: none"> Four scanners currently operational, used only for imports 	<ul style="list-style-type: none"> Two export-oriented scanners fully operational at the port One new scanner fully operational at the airport 	<ul style="list-style-type: none"> Airport and Aviation Services Sri Lanka Customs (Central Cargo Examination Directorate) 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation Airport and Aviation Services
1.2.2. Operationalise the maritime single window. In parallel, fast-track the implementation of the port community system to connect port users.	High	All goods sectors	<ul style="list-style-type: none"> Status of maritime single window Status of port community system 	<ul style="list-style-type: none"> Maritime single window and port community system not operationalised 	<ul style="list-style-type: none"> Maritime single window and port community system operational 	<ul style="list-style-type: none"> Sri Lanka Ports Authority 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation Sri Lanka Customs
1.2.3. Run pilot for testing green and sustainable logistics solutions, and scale based on achieved results. <ul style="list-style-type: none"> Convert high-traffic warehouses near Colombo Port and Katunayake to rooftop solar In parallel, pilot electric inter-terminal trucks and a yard-tractor fleet on one port-to-inland container depot corridor Electric tug operations Install shared chargers at the port and at the inland depot Bunkering facilities (green fuel) Provide fast-track permits and a simple matching grant so firms can join 	Medium	All sectors	<ul style="list-style-type: none"> High-traffic warehouses near Colombo Port and Katunayake converted to rooftop solar, and associated installed solar capacity Firms participating in the pilot (using solar-powered facilities and/or electric fleets) 	<ul style="list-style-type: none"> Transition of energy source from diesel to electric 	<ul style="list-style-type: none"> Electric fleet and charging network servicing at least one key port-inland container depot corridor Green logistics pilot firms TBD 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation 	<ul style="list-style-type: none"> Sri Lanka Ports Authority Sri Lanka Sustainable Energy Authority Civil Aviation Authority Ministry of Power

Strategic Objective 2: Establish a predictable trade facilitation regime that reduces costs and clearance times through simplified tariffs, digitalised Customs, and risk-based controls.

Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agency	Supporting actors
Sub objective 2.1: Modernise and harmonise the trade regulatory framework for predictable, transparent border procedures.							
2.1.1. Promulgate the updated Customs Ordinance and related legislative reforms, including the Sri Lanka Ports Authority Act and Merchant Shipping Act.	High	All goods sectors	<ul style="list-style-type: none"> Status of legislative reforms 	<ul style="list-style-type: none"> Legislative reforms and amendments to related laws have been initiated but remain unimplemented 	<ul style="list-style-type: none"> Legislative reforms completed, prioritising Customs Ordinance, Import Export Control Act, Exchange Control Act, Electronic Transaction Act, Direct Merchant Shipping Act, and Sri Lanka Ports Authority Act 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Ministry of Ports, Shipping and Civil Aviation 	<ul style="list-style-type: none"> Sri Lanka Customs Ministry of Ports, Shipping and Civil Aviation Attorney General's Department
2.1.2. Implement the National Tariff Policy and rationalise para-tariffs at the border.	High	All goods sectors	<ul style="list-style-type: none"> Status of implementation of National Tariff Policy 	<ul style="list-style-type: none"> Policy in place, awaiting implementation 	<ul style="list-style-type: none"> National Tariff Policy fully implemented by 2030 	<ul style="list-style-type: none"> Department of Trade and Investment Policy Ministry of Finance, Planning and Economic Development 	<ul style="list-style-type: none"> Sri Lanka Customs Ministry of Trade, Commerce, Food Security and Cooperative Development Board of Investment
2.1.3. Conduct a focused review of import regulations and design a controlled liberalisation regime for export processing only. <ul style="list-style-type: none"> Provide regulatory permissions and deploy incentives for an import-process-export model to support developing processing and exporting capacities. Review Customs procedures to clearly differentiate between value-added re-exports and domestic consumption for electrical components. Establish formal demarcation guidelines to reduce clearance delays and improve transparency for exporters. Strengthen existing green-channel facilities facilitated via the Export Development Board for pre-registered electronics exporters and 	High	<ul style="list-style-type: none"> Agri sectors, particularly plantation-based and spices Processed F&B sector Minerals Electrical and electronic components Other NEDP priority sectors 	<ul style="list-style-type: none"> Number of sectors / products liberalised 	<ul style="list-style-type: none"> Spices in the process of liberalisation 	<ul style="list-style-type: none"> Liberalisation of imports for the NEDP priority sectors 	<ul style="list-style-type: none"> National Tariff Committee Ministry of Finance, Planning and Economic Development 	<ul style="list-style-type: none"> Board of Investment Sri Lanka Customs Ministry of Trade, Commerce, Food Security and Cooperative Development Relevant government institutions Telecommunications Regulatory Commission of Sri Lanka

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agency	Supporting actors
<p>prototype developers by facilitating duty-free, one-day clearance with risk-based checks. Address persistent delays affecting imports for the approved firms that are Export Development Board-registered and possess a Telecommunications Regulatory Commissions Vendor Licence.</p>							
<p>2.1.4. Assess the feasibility of allowing a regulated release of waste material / by-products from free zones into the domestic market linked to other value chains, with due diligence on safeguards on volume thresholds, standards compliance, and revenue implications.</p>	High	All NEDP priority sectors	<ul style="list-style-type: none"> Status of the feasibility study 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Decision taken based on the feasibility report 	<ul style="list-style-type: none"> Board of Investment 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Sri Lanka Customs Ministry of Trade, Commerce, Food Security and Cooperative Development
<p>2.1.5. Accelerate WTO-TFA reforms:</p> <ul style="list-style-type: none"> Advance publication and prior notification of trade regulations Electronic exchange of Customs declarations Electronic application and issuance of sanitary and phytosanitary certificates AEO programme (revitalisation) Electronic submission of Customs declarations by postal operators and express carriers 	High	All goods sectors	<ul style="list-style-type: none"> Status of implementation of WTO-TFA reforms 	<ul style="list-style-type: none"> A 95.8% implementation status 	<ul style="list-style-type: none"> Targets identified as part of 2.1.3 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Ministry of Trade, Commerce, Food Security and Cooperative Development National Trade Facilitation Committee Secretariat
<p>2.1.6. Implement a private-sector awareness and coaching programme on relevant trade facilitation issues, broken down by modules, e.g., Customs reforms, requesting and using advance rulings on tariff classification and valuation, trade finance, standards, etc.</p>	High	All goods sectors	<ul style="list-style-type: none"> Number of awareness and coaching sessions 	<ul style="list-style-type: none"> Two regular training courses annually covering 300 exporters / entrepreneurs ("Certificate Course on Import and Export Procedures", and "Certificate 	<ul style="list-style-type: none"> 20 programmes for 1,500 exporters / entrepreneurs 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Sri Lanka Customs

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agency	Supporting actors
2.1.7. Publish standard operating procedures and guidance for the \$3,000 low-value export facility, and run targeted outreach to SMEs and couriers, clarifying bulk filing responsibilities (courier versus exporter), exporter identification requirements, and destination-country summary reporting.	High	All goods sectors	<ul style="list-style-type: none"> Percentage of eligible SME and courier export shipments (≤\$3,000 value) utilising the export entry fee benefit 	<p>Course on Operational Aspects of International Trade" to enhance knowledge on Customs procedures, port procedures, etc.)</p> <ul style="list-style-type: none"> Poor utilisation based on weak awareness 	<ul style="list-style-type: none"> ≥80% of all eligible SME and courier export shipments in this category utilise the fee benefit 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Sri Lanka Customs Ministry of Trade, Commerce, Food Security and Cooperative Development
2.1.8. Develop and implement a formal advance ruling system for tariff classification and valuation, including legal provisions for rulings to be binding and valid for three years. Train Customs officials on standardised procedures for processing and honouring advance rulings. Monitor and report on the usage, turnaround time, and compliance with advance rulings to ensure transparency and improvement.	Medium	All goods sectors	<ul style="list-style-type: none"> Number of tariff classification and valuation advance rulings issued per year by Customs 	<ul style="list-style-type: none"> 400 advance rulings per year Zero advance rulings on valuation principles 	<ul style="list-style-type: none"> For classification, ≥ 600 advance rulings per year for classification For valuation principles: As the requirement occurs 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> National Trade Facilitation Committee Secretariat Ministry of Trade, Commerce, Food Security and Cooperative Development
2.1.9. Strengthen and expand Sri Lanka's AEO programme by expanding accreditation to diverse supply chain participants, enhancing compliance standards, and providing greater trade facilitation benefits to certified operators.	Medium	All goods sectors	<ul style="list-style-type: none"> AEO-certified operators (including SMEs and smaller supply chain actors) 	<ul style="list-style-type: none"> All 71 AEOs, including 40 exporters Zero SMEs (guideline finalised for SMEs) 	<ul style="list-style-type: none"> At least 50% increase in certified operators 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Ministry of Trade, Commerce, Food Security and Cooperative Development Export Development Board

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agency	Supporting actors
<p>2.1.10. Develop a multi-year national trade facilitation plan driven by the National Trade Facilitation Committee, with clear performance indicators and integration at all government levels, including the following:</p> <ul style="list-style-type: none"> • Establishment of a comprehensive framework that outlines specific goals, timelines, and responsibilities for all stakeholders involved in trade facilitation • Implementation of measurable performance indicators to assess progress and effectiveness, ensuring accountability <ul style="list-style-type: none"> ▪ Regular reviews and updates to the plan based on feedback and changing trade dynamics. 	Medium	All goods sectors	<ul style="list-style-type: none"> • Trade facilitation plan • Annual National Trade Facilitation Committee plenary meetings with participation from key public and private members 	<ul style="list-style-type: none"> • Plan is yet to be developed • Meetings conducted quarterly 	<ul style="list-style-type: none"> • Plan is developed • At least four plenary meetings annually, with active participation from all key public and private stakeholders 	<ul style="list-style-type: none"> • National Trade Facilitation Committee Secretariat 	<ul style="list-style-type: none"> • Ministry of Finance, Planning and Economic Development • Ministry of Trade, Commerce, Food Security and Cooperative Development • Sri Lanka Customs
<p>2.1.11. Develop and enforce clear, time-bound service delivery standards for all key Customs clearance processes (e.g., document verification, cargo inspection, dispute resolution), including defined turnaround times published online. Put in place a performance monitoring system to track and publicly report compliance, along with a grievance redress mechanism. Conduct related training for Customs officials and the private sector.</p>	Medium	All goods sectors	<ul style="list-style-type: none"> • Share of import and export declarations cleared within legally mandated processing timelines, as reported on public transparency dashboards 	<ul style="list-style-type: none"> • No explicit legal timelines in place; no public dashboards and no systematic measurement of on-time clearance 	<ul style="list-style-type: none"> • Legal timelines established for all core import / export procedures, dashboards operational, and at least 80% of declarations cleared within the mandated timelines 	<ul style="list-style-type: none"> • Sri Lanka Customs 	<ul style="list-style-type: none"> • National Trade Facilitation Committee Secretariat
<p>Subobjective 2.2: Digitise and de-risk trade processes to facilitate SMEs, e-commerce and efficient export logistics.</p>							
<p>2.2.1. Implement an NSW for online application and approval of all certificates / No Objection Certificates related to trade, including all relevant agencies.</p>	High	All goods sectors	<ul style="list-style-type: none"> • Operational status of NSW 	<ul style="list-style-type: none"> • NSW planned (inception stages) 	<ul style="list-style-type: none"> • NSW operational for online submissions, unified declarations / inspections / payments, and interagency e-data sharing 	<ul style="list-style-type: none"> • Ministry of Finance, Planning and Economic Development (through the NSW Programme Office) 	<ul style="list-style-type: none"> • Sri Lanka Customs • Ministry of Trade, Commerce, Food Security and Cooperative Development • Information and Communication Technology Agency

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agency	Supporting actors
2.2.2. Develop a national e-commerce strategy for Sri Lanka aimed at facilitating growth within the e-commerce ecosystem, and position digital trade as a conduit for exports competitiveness.	High	All sectors	<ul style="list-style-type: none"> Status of national e-commerce strategy 	<ul style="list-style-type: none"> No national e-commerce strategy exists 	<ul style="list-style-type: none"> E-commerce strategy exists and is in the implementation stage 	<ul style="list-style-type: none"> Lead agency to be mandated / identified 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Digital Economy Export Development Board Central Bank of Sri Lanka
2.2.3. Introduce transparent norms and provisions for Customs clearance for express cargo in Sri Lanka.	High	All sectors	<ul style="list-style-type: none"> Specific regulatory provisions for express cargo 	<ul style="list-style-type: none"> No regulatory provisions existing for express cargo 	<ul style="list-style-type: none"> Specific regulatory provisions implemented for express cargo 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Ports, Shipping and Civil Aviation
2.2.4. Make digital signatures in trade documentation mandatory, possibly via a staggered compliance timeframe, for secure, efficient, and legally recognised Customs document processing.	Medium	All goods sectors	<ul style="list-style-type: none"> Status of digital signatures Percentage of trade and Customs documents submitted with digital signatures 	<ul style="list-style-type: none"> Digital signatures introduced, but not mandatory 	<ul style="list-style-type: none"> 75% of all trade and Customs documents submitted using legally recognised digital signatures by all registered exporters, importers, and intermediaries All relevant agencies' systems fully integrated to process digital signature-based documentation 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development 	<ul style="list-style-type: none"> Sri Lanka Customs Ministry of Ports, Shipping and Civil Aviation Ministry of Trade, Commerce, Food Security and Cooperative Development Information and Communications Technology Agency
2.2.5. Introduce a mandatory licensing and supervise regime for cross-border couriers, and integrate operators into Customs risk management and de minimis reporting.	Medium	All goods sectors	<ul style="list-style-type: none"> Share of cross-border courier operators licensed 	<ul style="list-style-type: none"> No mandatory licensing regime; most operators 	<ul style="list-style-type: none"> ≥90% of active cross-border courier 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and 	<ul style="list-style-type: none"> Sri Lanka Customs

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agency	Supporting actors
			and supervised under the new regime	not formally supervised	operators licensed and under supervision	Cooperative Development	
2.2.6. Adopt risk-based inspections with export scanning: green-channel low-risk shipments, focus checks on high-risk consignments, and track clearance times.	Medium	All goods sectors	<ul style="list-style-type: none"> Average clearance time for export consignments (from declaration to release), disaggregated by risk channel 	<ul style="list-style-type: none"> A risk management system is available but it is ineffective for exports due to technical issues 	<ul style="list-style-type: none"> Average clearance time for green-channel exports reduced by at least 15% to 20% compared with baseline, and tracked regularly by Customs 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation
2.2.7. Implement an electronic cargo tracking system to enable and monitor inland export clearance processes.	Medium	All goods sectors	<ul style="list-style-type: none"> Percentage of export consignments cleared inland using the electronic cargo tracking system 	<ul style="list-style-type: none"> 0% 	<ul style="list-style-type: none"> 50% 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> Ministry of Ports, Shipping and Civil Aviation
2.2.8. Create a centralised online portal providing up-to-date information on standards and certification requirements for Sri Lanka's top 20 export commodities: <ul style="list-style-type: none"> Product-specific standards, certification, and labelling requirements for major export destinations Automate regular updates by integrating with reliable international information sources (e.g. International Trade Centre Standards Map, WTO notifications) Enable language localisation. 	Medium	All goods sectors	<ul style="list-style-type: none"> Status of portal 	<ul style="list-style-type: none"> Portal exists but mainly focuses on national (Sri Lanka) requirements 	<ul style="list-style-type: none"> Centralised online portal based on defined requirements 	<ul style="list-style-type: none"> Department of Commerce Export Development Board 	<ul style="list-style-type: none"> National Trade Facilitation Committee Secretariat Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Foreign Affairs, Foreign Employment and Tourism
2.2.9. Enhanced coordination with international bodies like the WCO and adoption of their standards for cross-border e-commerce could streamline Customs processes for SMEs.	Medium	All goods sectors	<ul style="list-style-type: none"> Number of key WCO cross-border e-commerce standards or recommendations formally adopted into national Customs regulations 	<ul style="list-style-type: none"> No WCO e-commerce standards adopted Engagement with WCO is ad hoc 	<ul style="list-style-type: none"> At least four key e-commerce standards integrated (as recommended by the WCO Framework of Standards on Cross-Border E-Commerce) At least two meetings per year, with 	<ul style="list-style-type: none"> Sri Lanka Customs 	<ul style="list-style-type: none"> World Customs Organization Ministry of Trade, Commerce, Food Security and Cooperative Development

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agency	Supporting actors
			<ul style="list-style-type: none"> Frequency of formal coordination meetings or working groups with the WCO (per year) 		documented outcomes or ongoing collaboration projects		
2.2.10. Enhance transparency and coordination in maritime logistics pricing and documentation requirements on par with international standards.	Medium	All goods sectors	<ul style="list-style-type: none"> Availability of standardised, publicly accessible schedules for port / shipping fees and documentation requirements Status of guidelines on shipping and ancillary charges 	<ul style="list-style-type: none"> Information available sporadically 	<ul style="list-style-type: none"> Single, comprehensive online schedule of standardised fees and documentation in force and regularly updated Guidelines in place on shipping and ancillary charges 	<ul style="list-style-type: none"> Director of Merchant Shipping, Ministry of Ports, Shipping and Civil Aviation 	
2.2.11. Introduce targeted regulatory adjustments to the 'Hub Operations / Commercial Hub' and related bonded / free-port regimes for processed F&B to permit deeper value addition under bonded conditions to re-export to partner markets.	Medium	Processed F&B	<ul style="list-style-type: none"> Status of regulatory adjustments Permissible percentage of value addition under bonded conditions to re-export to partner markets 	<ul style="list-style-type: none"> Limited value addition permissible under the Hub Operations framework 	<ul style="list-style-type: none"> Regulatory changes made, and reform package approved and issued by the end of 2027 >15 % 	<ul style="list-style-type: none"> Treasury Department 	<ul style="list-style-type: none"> Board of Investment Department of Commerce Export Development Board

Strategic Objective 3: Create an enabling trade finance and investment ecosystem that lowers the cost of capital, reduces business frictions, and expands serviced investment space.

Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
Subobjective 3.1: Enhance access to diverse and affordable trade finance instruments for SMEs and exporters through improved financial literacy, streamlined credit processes, and targeted awareness campaigns.							
3.1.1. Accelerate adoption of digital supply-chain finance and receivables-based lending platforms. <ul style="list-style-type: none"> Promote reverse factoring by anchor buyers in key export value chains Leverage donor and Asian Development Bank risk-sharing facilities to reduce banks' credit risk and crowd in private liquidity Explore the feasibility of leveraging the Secure Transaction Registry to provide supply chain financing 	High	All sectors	<ul style="list-style-type: none"> Volume of financing (\$) disbursed via Supply Chain Financing and receivables-based platforms annually 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> \$1 million 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Central Bank of Sri Lanka 	<ul style="list-style-type: none"> Commercial banks
3.1.2. Implement targeted, multilingual outreach and training seminars for exporters to improve understanding of available trade finance products, guarantee schemes, and government support programmes, ensuring accessibility across urban and rural regions. Ensure coordination between different agencies offering training programmes.	High	All sectors	<ul style="list-style-type: none"> Number of SMEs participating in outreach and training seminars conducted for SMEs and exporters 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> 2,000 SMEs supported annually, including at least 400 women-led SMEs 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Sri Lanka Export Credit Insurance Corporation Central Bank of Sri Lanka Department of Export Agriculture Ministry of Plantation and Community Infrastructure Ministry of Industries Ministry of Finance, Planning and Economic Development Sector associations
3.1.3. Revise and relaunch export credit guarantee and insurance schemes with simplified procedures, active promotion, and technical assistance for SMEs to mitigate risks associated with international transactions.	High	All sectors	<ul style="list-style-type: none"> Number of SMEs enrolled in export credit guarantee and insurance schemes 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> 200 SMEs enrolled in revised schemes by 2030 	<ul style="list-style-type: none"> Sri Lanka Export Credit Insurance Corporation 	<ul style="list-style-type: none"> Export Development Board Central Bank of Sri Lanka Commercial banks

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
3.1.4. Empower the Export Development Board to facilitate loan guarantee schemes for SME exporters, working in partnership with financial institutions and relevant government agencies to reduce collateral barriers and expand access to export finance. Strengthen the Export Development Board's capacity to serve as a central support hub.	High	NEDP priority sectors	<ul style="list-style-type: none"> Number of SME exporters supported through Export Development Board-facilitated loan guarantee schemes 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> 500 SME exporters supported, including at least 75 women exporters 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development
3.1.5. Ensure that the National Financial Inclusion Strategy Phase II incorporates NEDP tenets on SME access to finance and trade finance, as well as financial literacy, alongside other actions under Strategic Objective 3 (creating an enabling trade finance and investment ecosystem).	High	All sectors	<ul style="list-style-type: none"> National Financial Inclusion Strategy Phase II reflects NEDP Strategic Objective-related actions 	<ul style="list-style-type: none"> NEDP-related SME finance and financial literacy actions not integrated into the National Financial Inclusion Strategy 	<ul style="list-style-type: none"> National Financial Inclusion Strategy Phase II incorporates relevant NEDP actions aligned with Strategic Objective 3 	<ul style="list-style-type: none"> Central Bank of Sri Lanka 	<ul style="list-style-type: none"> Export Development Board
3.1.6. Conduct structured outreach and onboarding campaigns to increase the participation of export-ready SMEs under the New Exporter Development Programme.	Medium	All sectors	<ul style="list-style-type: none"> Number of export-ready SMEs onboarded to the Sri Lanka Export Excellence Initiative through structured outreach and Export Development Board / regional network partnerships 	<ul style="list-style-type: none"> 542 SMEs assisted 	<ul style="list-style-type: none"> 1,000 new SMEs assisted, including at least 200 women-led SMEs 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Department of Commerce (Ministry of Trade, Commerce, Food Security and Cooperative Development) Regional Chambers Board of Investment
3.1.7. Introduce a dedicated SME support trade finance scheme to the Export Development Board New Exporter Development Programme to assist with capacity development of new exporters.	Medium	All sectors	<ul style="list-style-type: none"> Number of New Exporter support schemes 	<ul style="list-style-type: none"> Zero 	<ul style="list-style-type: none"> At least one scheme 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Donor funding institutes Commercial banks

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
<p>3.1.8. Develop standardised and transparent credit assessment criteria, integrating improved use of credit bureau data and alternative credit scoring to reduce collateral dependency and accelerate loan approvals for SMEs.</p>	Medium	All sectors	<ul style="list-style-type: none"> Percentage of SME loan applications assessed via credit bureau data / alternative credit scoring 	<ul style="list-style-type: none"> 10% (most assessments heavily rely on collateral / manual review) 	<ul style="list-style-type: none"> Finalise the alternate credit scoring by December 2026 Target (2030): 75% of SME loan applications assessed using the newly developed criteria 	<ul style="list-style-type: none"> Central Bank of Sri Lanka 	<ul style="list-style-type: none"> Credit Information Bureau Ministry of Finance, Planning and Economic Development Commercial banks
<p>3.1.9. Finalise and operationalise the Securities and Exchange Commission's equity crowdfunding framework, clearly setting out regulatory requirements, reporting obligations, and investor risk-mitigation measures. Launch a pilot phase by licensing a small number of platforms. Launch targeted awareness and capacity-building initiatives.</p>	Medium	All sectors	<ul style="list-style-type: none"> Regulatory status of the Securities and Exchange Commission's equity crowdfunding framework and pilot licensing of platforms 	<ul style="list-style-type: none"> Draft framework under discussion; no approved regulation and no licensed equity crowdfunding platforms 	<ul style="list-style-type: none"> Framework formally approved and in force, with at least one equity crowdfunding platform licensed and operating under Securities and Exchange Commission rules 	<ul style="list-style-type: none"> Securities and Exchange Commission 	<ul style="list-style-type: none"> Export Development Board Sri Lanka Export Credit Insurance Corporation Central Bank of Sri Lanka
<p>3.1.10. Conduct a feasibility study to assess setting up a dedicated Sri Lanka export-import bank to provide tailored export-import financing and risk mitigation, increasing SME export financing access and boosting export volumes.</p>	Low	All sectors	<ul style="list-style-type: none"> Status of the feasibility study 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Completion of the feasibility study 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development 	<ul style="list-style-type: none"> Central Bank of Sri Lanka Sri Lanka Export Credit Insurance Corporation Export Development Board State banks (Bank of Ceylon, National Development Bank)
<p>Subobjective 3.2: Simplify and digitise licensing, registration, and compliance procedures to create a transparent and efficient operating environment for businesses.</p>							
<p>3.2.1. Ensure that planned abolition of the Simplified VAT scheme is accompanied by robust reform of the standard VAT refund system to avoid repeating past problems of long, unpredictable refund delays. Define clear, time-bound service standards for VAT refunds, risk-based processing (with fast-track treatment for compliant exporters), greater use of electronic filing and tracking, and automatic interest or penalties when refund timelines are not met.</p>	High	All sectors	<ul style="list-style-type: none"> VAT refunds issued within the prescribed timelines 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> 100 % of refunds issued in the mandated 45 days 	<ul style="list-style-type: none"> Inland Revenue Department 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
3.2.2. Develop a national regulatory reform action plan aimed at streamlining licensing, permit, and registration requirements for businesses in Sri Lanka.	High	All sectors	<ul style="list-style-type: none"> Implementation of reforms included in the reform action plan 	<ul style="list-style-type: none"> Zero 	<ul style="list-style-type: none"> Implementation of reform actions (2030) 	<ul style="list-style-type: none"> Ministry of Industries and Entrepreneurship Development 	<ul style="list-style-type: none"> Export Development Board Board of Investment Department of Registrar of Companies Other relevant agencies
3.2.3. Establish a comprehensive online single window / integrated business licensing system that serves as a one-stop shop for businesses to obtain all licences and clearances.	High	All NEDP priority sectors	<ul style="list-style-type: none"> Status of the single window system 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Online single window system established 	<ul style="list-style-type: none"> Ministry of Industries and Entrepreneurship Development Ministry of Digital Economy 	<ul style="list-style-type: none"> Relevant line ministries and agencies
3.2.4. Finalise and adopt the National Minerals Policy and amend associated laws and regulations to introduce a tiered royalty framework that links royalty rates to verified levels of in-country value addition, rewarding domestic processing and product upgrading. Establish clear eligibility criteria and verification procedures, pilot the approach for selected minerals, and scale nationally based on results.	Medium	Minerals	<ul style="list-style-type: none"> Status of National Minerals Policy Share of mineral exports that are processed / value-added in Sri Lanka (by volume or value) 	<ul style="list-style-type: none"> Under development (expected 2026) +10 % by Year 3; +20 % by Year 5 (from baseline) 	<ul style="list-style-type: none"> Policy adopted by 2026 	<ul style="list-style-type: none"> Ministry of Industries and Entrepreneurship Development 	<ul style="list-style-type: none"> Geological Survey and Mines Bureau Ministry of Environment Export Development Board
3.2.5. Implement targeted awareness and capacity-building measures, and deploy incentives for exporters to improve understanding of and compliance with the Rules on Repatriation of Export Proceeds issued under the Central Bank of Sri Lanka Act, No. 16 of 2023.	Medium	All sectors	<ul style="list-style-type: none"> Inclusion of repatriation rules in the Export Development Board's exporter guidance and outreach materials 	<ul style="list-style-type: none"> Limited or ad hoc awareness among exporters on the Rules on Repatriation of Export Proceeds 	<ul style="list-style-type: none"> Awareness of repatriation rules systematically integrated into regular exporter outreach and capacity-building programmes 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Central Bank of Sri Lanka Commercial banks Industry chambers Exporter associations

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
Subobjective 3.3: Facilitate new investment by addressing land and regulatory access barriers, ensuring policy consistency, and aligning incentives with priority sectors for export-led growth.							
3.3.1. Review the Economic Transformation Act (2024) and introduce appropriate legislation to streamline the investment climate in Sri Lanka.	High	All Sectors	<ul style="list-style-type: none"> Status of the Economic Transformation Act 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Enactment of the Economic Transformation Act or similar legislation aimed at streamlining the investment climate in Sri Lanka 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development 	<ul style="list-style-type: none"> Board of Investment
3.3.2. Ensure NEDP priority sectors are adopted as investment priority sectors to facilitate technology transfer and attraction of investors, etc.	High	All NEDP priority sectors	<ul style="list-style-type: none"> Status of priority sectors by Board of Investment 	<ul style="list-style-type: none"> Partial alignment between NEDP priority sectors and investment priority sectors 	<ul style="list-style-type: none"> NEDP priority sectors are included by 2026 	<ul style="list-style-type: none"> Board of Investment 	<ul style="list-style-type: none"> Export Development Board
3.3.3. Create and publish online an investment-ready land bank that earmarks land identified in Sri Lanka for setting up export-oriented industries. The land bank should include data regarding eligible industries / sectors, supporting infrastructure, price, etc.	Medium	All NEDP priority sectors	<ul style="list-style-type: none"> Status of the land bank 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Land bank to be developed and published online 	<ul style="list-style-type: none"> Ministry of Agriculture, Livestock, Land, and Irrigation 	<ul style="list-style-type: none"> Ministry of Public Administration, Provincial Councils and Local Government Survey Department of Sri Lanka Board of Investment
3.3.4. Prioritise investment in expanding existing industrial zones and developing new ones, ensuring adequate infrastructure, serviced land, and transparent allocation policies to attract investors and support diversification.	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Number of new or expanded industrial zones with adequate infrastructure and transparent land allocation policies 	<ul style="list-style-type: none"> 15 existing zones 	<ul style="list-style-type: none"> At least three new industrial zones operational with serviced land (Board of Investment) 	<ul style="list-style-type: none"> Board of Investment Ministry of Industry and Entrepreneurship Development 	<ul style="list-style-type: none"> Ministry of Agriculture, Livestock, Land, and Irrigation

Strategic Objective 4: Build a connected, market-led trade promotion system that catalyses Sri Lankan export growth and diversification in priority markets.

Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
Subobjective 4.1: Build a connected, market-led export promotion and in-market support system that positions Sri Lanka and its firms competitively in priority markets.							
4.1.1. Strengthen in-depth market intelligence for the NEDP product-market combinations and disseminate to exporters via the Export Development Board and sector associations, as well as posting it on the Export Development Board website (with language localisation).	High	<ul style="list-style-type: none"> NEDP priority sectors (first year) Phased progression from NEDP priority sectors to include all sectors 	<ul style="list-style-type: none"> Priority-sector market intelligence products published and disseminated (per quarter) Number of export firms receiving in-market support through sector trade missions (per year) 	<ul style="list-style-type: none"> Separate market and sector reports (about 15) Market reports are updated annually, while product / sector reports are updated less frequently 	<ul style="list-style-type: none"> Market and product combination reports for all NEDP sectors, updated every two years 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Foreign Affairs, Foreign Employment and Tourism Department of Commerce (Ministry of Trade, Commerce, Food Security and Cooperative Development) Board of Investment Ministry of Industry and Entrepreneurship Development
4.1.2. Organise structured, sector-focused trade missions to priority target markets for SME exporters, combining participation in international trade fairs and exhibitions with curated buyer-seller meetings, in-market networking events and site visits.	High	<ul style="list-style-type: none"> NEDP priority sectors (first year) Phased progression from NEDP priority sectors to include all sectors 	<ul style="list-style-type: none"> Number of export firms receiving in-market support through sector trade missions (per year) 	<ul style="list-style-type: none"> 150 export SMEs supported annually (2025) 	<ul style="list-style-type: none"> At least 250 export SMEs supported annually 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Foreign Affairs, Foreign Employment and Tourism Department of Commerce (Ministry of Trade, Commerce, Food Security and Cooperative Development) Board of Investment Ministry of Industry and Entrepreneurship Development

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
<p>4.1.3. Conduct value chain studies for select priority sectors, particularly rubber, to address high fragmentation and support needs (inputs, trade finance, investments, trade promotions) across the value chain. Develop linked (to the NEDP and any value chain studies) export strategies for each NEDP sector.</p> <p>For selected high-potential segments, prepare detailed long-term roadmaps that map value-chain requirements and prioritise investments, skills development, trade promotion, and enterprise capacity-building.</p>	High	NEDP priority sectors, prioritising emerging market segments in EV, spices, and rubber	<ul style="list-style-type: none"> Value chain studies and export strategies 	<ul style="list-style-type: none"> Sri Lanka Ceylon Cinnamon Export Assessment – gap analysis including five market analyses (US, UK, Australia, Germany, Brazil) conducted by Euro Monitor in 2023 	<ul style="list-style-type: none"> Value chain studies and export strategies for each NEDP priority sector developed Roadmaps for the EV industry, spices (value addition), and rubber value-added segments developed 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Foreign Affairs, Foreign Employment and Tourism Department of Commerce (Ministry of Trade, Commerce, Food Security and Cooperative Development) Board of Investment Ministry of Industry and Entrepreneurship Development
<p>4.1.4. Establish a co-funded export exhibition support scheme to help priority-sector exporters participate in international trade fairs, using a graduated cost-sharing model: first participation – 100% grant support; second – 70/30; third – 50/50; 4th+ – capped support (or loans), linked to clear export-readiness criteria and post-fair reporting on leads and orders.</p>	High	NEDP priority sectors	<ul style="list-style-type: none"> Exporters supported for international exhibitions under the staggered scheme (annual) 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> 1,000 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Finance, Planning and Economic Development Ministry of Foreign Affairs, Foreign Employment and Tourism
<p>4.1.5. Review and streamline the procurement of exhibition spaces overseas for key Commodity Boards by simplifying application, approval and reimbursement procedures, and introducing SME-friendly fast-track windows, so that small and medium-sized exporters can more easily access support for trade fairs, branding, and market development.</p>	Medium	All sectors	<ul style="list-style-type: none"> Average processing time for SME export-promotion support applications at commodity boards (application for approval / reimbursement) 	<ul style="list-style-type: none"> Lengthy, multi-step processing; takes several weeks or more, with no standard timelines 	<ul style="list-style-type: none"> Processing time reduced by at least 50% compared with baseline, with clear service standards in place for all main schemes 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Central Bank of Sri Lanka Export Development Board 	<ul style="list-style-type: none"> Commodity Boards

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
4.1.6. Adopt a unified national export brand architecture (for example “Sri Lanka”, “Ceylon”, and sector brands) and ensure that all sectoral branding and marketing campaigns (tourism, Export Development Board, and individual sectors) are aligned with, and derived from, this common framework to build strong, differentiated product identities in target markets.	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Status of a nationally approved export brand architecture with appropriate guidance for usage 	<ul style="list-style-type: none"> A National Export Brand exists, but sectoral branding is not well linked to the national brand 	<ul style="list-style-type: none"> Approved export brand architecture in place, with standardised templates and brand guidelines, including rules for developing sector sub-brands, and specifications for logo usage, colour palettes, typography, etc. 	<ul style="list-style-type: none"> National Procurement Commission Sri Lanka Tourism Promotion Bureau 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Export Development Board Ministry of Foreign Affairs, Foreign Employment and Tourism
4.1.7. Promote indigenous brands alongside country branding by implementing export-readiness and branding support programmes that help firms build scalable company brands and compete internationally (including for awards / prizes).	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Firms receiving structured export-branding support and achieving recognised international brand visibility (e.g., international awards, listings, or major retail placements) / online placements) 	<ul style="list-style-type: none"> Presidential Export Recognition Awards, Chamber of Nation Exporters recognition awards 	<ul style="list-style-type: none"> Structured branding support provided to at least 50 firms annually, resulting in recognised international brand visibility (awards, listings, or comparable recognition) in key export markets 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Industry and Entrepreneurship Development Ministry of Trade, Commerce, Food Security and Cooperative Development
4.1.8. Design and pilot an exporter readiness programme, drawing on experience from the Sri Lanka Export Excellence Initiative 2025’s three-stage model (awareness training, hands-on export marketing planning, and facilitated market access via trade fairs and curated B2B links) to NEDP priority sectors and regional-specific programmes.	High	NEDP priority sectors	<ul style="list-style-type: none"> Programmes designed and implemented 	<ul style="list-style-type: none"> Zero 	<ul style="list-style-type: none"> Eight programmes per priority sector each year, including at least 2 programmes exclusively for women entrepreneurs 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Department of Commerce International donor agencies Divisional secretariats

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
4.1.9. Strengthen the existing Sri Lanka Export Excellence Initiative programme under the Export Development Board New Exporter Development Programme.	High	F&B, spices and concentrates, digital products and services, coconut, herbal cosmetics, handicrafts, and lifestyle	<ul style="list-style-type: none"> Number of firms completing the programme and approved as "export-ready" (per year) 	<ul style="list-style-type: none"> 50 	<ul style="list-style-type: none"> 300 firms, including at least 60 women led firms 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development International donor agencies Divisional secretariats
4.1.10. Institutionalise Sri Lanka Expo as a recurring, annual trade and investment platform by setting up an Export Development Board-led Expo Secretariat with a fixed annual calendar, multi-year sponsorship plan, structured buyer recruitment through overseas missions, curated B2B meeting programme, and post-Expo deal tracking (including investor forum).	High	All sectors	<ul style="list-style-type: none"> Number of international buyers and investors hosting / attending the Expo Structured B2B meetings completed and tracked leads generated (annual) 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Two Expos (2026 and 2028) 750 exhibitors (2026) 1,500 buyers (2026) 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Sri Lanka Institute of Marketing Ministry of Industry and Entrepreneurship Development Ministry of Foreign Affairs, Foreign Employment and Tourism Industrial Development Board National Enterprise Development Authority
4.1.11. Leverage regional e-commerce marketplaces (and build the competitiveness of local platforms and marketplaces) to promote Sri Lanka's products overseas.	Medium	All sectors	<ul style="list-style-type: none"> Number of active exporters Number of B2B inquiries Number of B2C transactions 	<ul style="list-style-type: none"> Active exporters B2B inquiries: 3,099 B2C transactions: < 5 	<ul style="list-style-type: none"> Active exporters: Onboard all active merchandise exporters, onboard key service exporters B2B inquiries: Over 10% annual growth B2C transactions: Over 10% annual growth 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Digital Economy

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
Subobjective 4.2: Enhance the institutional capacity of the Export Development Board, overseas missions, and partner agencies to perform a modern, market-driven trade promotion function.							
4.2.1. Conduct a comprehensive institutional benchmarking of the Export Development Board, assessing its organisational strategy, structure, and service offerings against the best practices of leading trade promotion agencies, and use the findings to design and implement a targeted capacity-building plan to strengthen the Export Development Board's role as Sri Lanka's trade promotion agency.	High	All sectors	<ul style="list-style-type: none"> Status of Export Development Board institutional capacity assessment and implementation of resulting capacity-building plan 	<ul style="list-style-type: none"> Institutional benchmarking not conducted 	<ul style="list-style-type: none"> Institutional benchmarking completed and technical capacity-building plan implemented Recognition in at least one award category in World Trade Organisation awards 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Finance, Planning and Economic Development
4.2.2. Strengthen interagency coordination on export and investment promotion across relevant agencies to align planning, messaging, and delivery of export promotion, in-market support, and investment promotion activities, including the identification of joint-venture opportunities. Digitalise coordination through a shared platform.	High	All sectors	<ul style="list-style-type: none"> Status of a formal coordination mechanism 	<ul style="list-style-type: none"> Coordination exists in ad hoc fashion 	<ul style="list-style-type: none"> Formal coordination established through a shared platform, involving a digital workflow 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Foreign Affairs, Foreign Employment and Tourism Department of Commerce Board of Investment Export Development Board Commercial attachés Relevant sector associations
4.2.3. Regularly review and update Sri Lanka's priority export markets, and, where exports are growing but representation is limited, establish or strengthen market presence (including through commercial attachés, trade offices or honorary consuls) to provide dedicated support to exporters.	High	NEDP priority sectors	<ul style="list-style-type: none"> High-growth priority markets with dedicated trade representation (commercial attaché, trade office, or honorary consul with a clear trade mandate) 	<ul style="list-style-type: none"> Limited representation; no systematic link between market growth and deployment decisions 	<ul style="list-style-type: none"> By 2030, trade representation established or strengthened in all high-growth priority markets, identified at commencement of NEDP implementation 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development (Department of Commerce) Ministry of Foreign Affairs, Foreign Employment and Tourism

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
<p>4.2.4. Formulate a clear strategy (including market prioritisation, training plan, institutional coordination loop) for Sri Lanka's commercial attachés / trade representatives' function. As a priority:</p> <ul style="list-style-type: none"> • Fill vacant commercial attaché positions and establish clear key performance indicators, along with defined career pathways and end-of-posting professional trajectories. • Develop a robust onboarding programme for new commercial attachés. • Develop an information and best practice sharing mechanism between commercial attachés. 	High	NEDP priority sectors	<ul style="list-style-type: none"> • Vacancy status of commercial attachés • Status of commercial attaché onboarding programme • Status of information-sharing mechanism 	<ul style="list-style-type: none"> • Nine positions vacant (Department of Commerce, 2026) • Existing onboarding programmes require updates • Information-sharing is ad hoc 	<ul style="list-style-type: none"> • At least 90% of vacant positions filled • Updated onboarding programme • Regularised information-sharing among commercial attachés, including the use of lead-generation tools and a shared customer relationship management system 	<ul style="list-style-type: none"> • Ministry of Trade, Commerce, Food Security and Cooperative Development / Department of Commerce 	<ul style="list-style-type: none"> • Ministry of Finance, Planning and Economic Development • Ministry of Foreign Affairs, Foreign Employment and Tourism • Export Development Board
<p>4.2.5. Undertake a comprehensive review of exporter-mission engagement by regularising recently initiated exporter-embassy dialogues, complemented by periodic (physical and virtual) meetings between exporters and overseas missions. Introduce a query-and-response mechanism so exporters can request support from overseas missions and track follow-up.</p>	High	All sectors	<ul style="list-style-type: none"> • Number of structured exporters-mission dialogue sessions held per year, and number of priority missions participating 	<ul style="list-style-type: none"> • Only ad hoc / pilot exporter-embassy dialogues; no regular schedule and limited mission participation 	<ul style="list-style-type: none"> • At least four structured dialogue sessions per year (physical or virtual), with participation from all priority missions 	<ul style="list-style-type: none"> • Export Development Board 	<ul style="list-style-type: none"> • Ministry of Trade, Commerce, Food Security and Cooperative Development (Department of Commerce) • Ministry of Foreign Affairs, Foreign Employment and Tourism

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
4.2.6. Integrate e-commerce / digital trade into the Export Development Board's core trade promotion services by helping exporters onboard to key B2B/B2C platforms and use them for market entry. Provide practical support such as digital marketing guidance and links to e-commerce logistics solutions as part of Export Development Board programmes, especially for SMEs.	Medium	All sectors	<ul style="list-style-type: none"> Exporters / SMEs supported by the Export Development Board to onboard and actively use digital marketplaces or e-commerce platforms 	<ul style="list-style-type: none"> Ad hoc support¹⁹ 	<ul style="list-style-type: none"> At least 50 new exporters / SMEs onboarded (annually) and actively selling on at least one digital marketplace through Export Development Board-supported programmes 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Digital Economy
4.2.7. Strengthen and institutionalise collaboration between the Export Development Board and international chambers / business councils based in Sri Lanka through regular joint events, information-sharing, and B2B matchmaking to support exporter market entry in target countries.	Medium	All sectors	<ul style="list-style-type: none"> Number of joint Export Development Board-international chamber events per year, such as seminars, B2B missions, market-briefing sessions 	<ul style="list-style-type: none"> Only ad hoc or occasional joint events with international chambers; no structured annual calendar 	<ul style="list-style-type: none"> A structured programme of at least five joint events per year between the Export Development Board and international chambers / business councils, focused on export promotion and market entry 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> International chambers / business councils
4.2.8. Undertake due diligence on existing and planned FTAs to identify gaps and opportunities for priority sectors, and develop forward-looking FTAs with sector-specific annexes for priority industries and explicit provisions on emerging areas such as digital trade, services, investment, sustainability, and mutual recognition of certification. Support implementation through targeted capacity-building for trade negotiators.	High	All sectors	<ul style="list-style-type: none"> Number of FTAs in force that include sector-specific annexes for priority industries and dedicated provisions on digital trade and/or sustainability 	<ul style="list-style-type: none"> 0-1 agreement with such detailed sector-specific and new-generation provisions 	<ul style="list-style-type: none"> At least three FTAs in force or concluded that contain sector-specific annexes for priority sectors and explicit chapters or provisions on digital trade and sustainability 	<ul style="list-style-type: none"> Department of Commerce 	<ul style="list-style-type: none"> Export Development Board Ministry of Foreign Affairs, Foreign Employment and Tourism Relevant line ministries and agencies

¹⁹ Very few exporters / SMEs using digital marketplaces with direct EDB assistance.

Strategic Objective 5: Strengthen national frameworks for quality, standards, and ESG to underpin sustained export competitiveness.

Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
Subobjective 5.1. Strengthen and modernise Sri Lanka's national quality infrastructure and standards compliance to support competitive, diversified exports.							
5.1.1. Operationalise the National Quality Council, update the 2016 National Quality Policy and related legislation, and put in place clear coordination and review mechanisms between standards, accreditation and market-surveillance bodies, aligned with NEDP priority sectors.	High	All priority sectors	<ul style="list-style-type: none"> Status of National Quality Council and updated national quality infrastructure policy / legislation 	<ul style="list-style-type: none"> National Quality Council not operational 2016 national quality infrastructure policy not updated Legal framework fragmented and outdated 	<ul style="list-style-type: none"> National Quality Council fully operational by 2027 Updated national quality infrastructure policy formally adopted Key legislative amendments enacted and in force 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development 	<ul style="list-style-type: none"> Ministry of Science and Technology Sri Lanka Standards Institution Sri Lanka Accreditation Board Export Development Board Measurement Units, Standards and Services Department Multiple line ministries and technical agencies
5.1.2. Strengthen the metrology, testing and calibration capabilities of the Sri Lanka Standards Institution and other aligned agencies (labs, systems, staff) to ensure Sri Lankan test and certification results are accepted in key export markets.	High	All sectors	<ul style="list-style-type: none"> Global Quality Infrastructure Index 	<ul style="list-style-type: none"> Overall Rank: 64 	<ul style="list-style-type: none"> Top 50 rank 	<ul style="list-style-type: none"> Sri Lanka Accreditation Board 	<ul style="list-style-type: none"> Sri Lanka Standards Institution
5.1.3. Establish an accredited multisector laboratory for testing in Sri Lanka, with international recognition, to reduce costs and delays. This will specifically support sectors such as minerals where the local network (private sector) of laboratories do not offer services for the sectors.	High	NEDP priority sectors	<ul style="list-style-type: none"> Operational status of the laboratory 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> At least one lab operationalised 	<ul style="list-style-type: none"> Ministry of Science and Technology Sri Lanka Standards Institution 	<ul style="list-style-type: none"> Sri Lanka Accreditation Board Ministry of Trade, Commerce, Food Security and Cooperative Development Relevant line ministries and technical agencies
5.1.4. Establish a national quality forum that regularly brings together line ministries, testing and certification bodies, accreditation agencies,	Medium	All sectors	<ul style="list-style-type: none"> Status of the forum 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Operationalise the national quality forum 	<ul style="list-style-type: none"> Export Development Board to convene 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
and private-sector representatives to discuss quality-related issues, align priorities, and agree on coordinated solutions.						until the National Quality Council is established	and Cooperative Development Sri Lanka Standards Institution
5.1.5. Prepare and implement a multi-year capacity-building and investment plan for key quality institutions, covering staffing, laboratory equipment, digital systems and accreditation, backed by predictable budget allocations and targeted development-partner support.	Medium	All sectors	<ul style="list-style-type: none"> Status of multi-year capacity and investment plan for key quality institutions (Sri Lanka Standards Institution, Sri Lanka Accreditation Board, metrology and core regulatory labs) 	<ul style="list-style-type: none"> No consolidated multi-year plan; investments and capacity-building are ad hoc and project-driven 	<ul style="list-style-type: none"> Multi-year plan approved and under implementation, with agreed annual budget allocations and identified development-partner support 	<ul style="list-style-type: none"> Ministry of Science and Technology Ministry of Trade, Commerce, Food Security and Cooperative Development 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development
5.1.6. Design and roll out coordinated outreach programmes that: <ul style="list-style-type: none"> Update and standardise curricula for extension officers / entrepreneurship development officers on export-related standards, certification and ESG Provide sector-specific training on key standards and buyer requirements Pilot value-chain programmes that translate technical requirements into simple, practical guidance for SMEs and producers 	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Extension and entrepreneurship officers trained on updated export standards and ESG curricula Sector / value-chain outreach pilots implemented 	<ul style="list-style-type: none"> No coordinated or structured curriculum. Existing trainings are ad hoc and not focused on export standards / ESG 	<ul style="list-style-type: none"> Updated curriculum developed for NEDP priority sectors At least four sector / value-chain pilots implemented 	<ul style="list-style-type: none"> Ministry of Industry and Entrepreneurship Development 	<ul style="list-style-type: none"> Ministry of Agriculture, Livestock, Land, and Irrigation Industrial Development Board Ministry of Trade, Commerce, Food Security and Cooperative Development Export Development Board Ministry of Fisheries Ministry of Plantation and Community Infrastructure
5.1.7. Support accreditation of selected university laboratories and enable them to provide testing and quality certification services for exporters, in coordination with Sri Lanka Standards Institution and Sri Lanka Accreditation Board.	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Number of universities 	<ul style="list-style-type: none"> University of Peradeniya 	<ul style="list-style-type: none"> At least two additional universities, including one provincial university (other 	<ul style="list-style-type: none"> Sri Lanka Accreditation Board 	<ul style="list-style-type: none"> Ministry of Education Sri Lanka Standards Institution

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
5.1.8. Prepare and implement a time-bound roadmap to align priority Sri Lankan standards with key international and regional norms (including EU requirements) and, where feasible, secure mutual recognition of conformity assessment results conducted by domestic labs or independent or recognised international certifications.	Low	<ul style="list-style-type: none"> Spices Processed F&B Other NEDP sectors 	<ul style="list-style-type: none"> Share of identified priority standards aligned with key international / regional norms 	<ul style="list-style-type: none"> Sri Lanka Standards Institution alignment complete with international standards 	<ul style="list-style-type: none"> 100% alignment of domestic labs with international standards 	<ul style="list-style-type: none"> Sri Lanka Standards Institution Sri Lanka Accreditation Board Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Health
5.2. Build robust national ESG frameworks and capacities that align export-oriented value chains with emerging international standards.							
5.2.1. Develop a national circular economy framework for Sri Lanka, including a clear EPR regime, with implementation facilitated by the Central Bank of Sri Lanka through alignment with the Green Finance Taxonomy. In parallel, establish a two-tier public-private platform: (i) a national advisory body on ESG, sustainability, and circularity with cross-ministerial and provincial representation; and (ii) an Export Development Board-led platform that focuses specifically on export-oriented sectors and topics to align circularity measures with export competitiveness.	High	All sectors	<ul style="list-style-type: none"> Status of national circular economy and EPR framework Number of public-private platform meetings held per year 	<ul style="list-style-type: none"> A circular economy and EPR framework does not exist Platform does not exist 	<ul style="list-style-type: none"> National circular economy and EPR framework approved National and Export Development Board-led ESG / circularity public-private platforms formally established and meeting at least twice a year 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Export Development Board 	<ul style="list-style-type: none"> Sustainable Development Council Ministry of Environment Ministry of Labour Central Bank of Sri Lanka Securities and Exchange Commission Ministry of Trade, Commerce, Food Security and Cooperative Development

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
<p>5.2.2. Align local certification schemes with recognised international sustainability standards to minimise duplicate audits and reduce compliance costs for exporters, as well as ensure international recognition of standards.</p> <p>In parallel, strengthen the domestic verification ecosystem, including the capacities / networks of local auditors.</p>	High	NEDP priority sectors	<ul style="list-style-type: none"> Number of local certification schemes formally benchmarked / recognised against key international sustainability standards (e.g., for tea, rubber, apparel, fisheries) 	<ul style="list-style-type: none"> Limited or no formal benchmarking; exporters often undergo multiple, overlapping audits 	<ul style="list-style-type: none"> At least 50 % of NEDP priority sector schemes benchmarked or recognised against relevant international sustainability standards (such as International Financial Reporting Standards S1/S2, Global Reporting Initiative, and European Union regulations including the Corporate Sustainability Due Diligence Directive and the EU Deforestation Regulation) 	<ul style="list-style-type: none"> All relevant ministries 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development Sustainable Development Council
<p>5.2.3. Review options to incentivise circular business models by offering reduced rates or exemptions for enterprises engaged in upcycling, waste reduction and resource recovery. Establish a clear framework that recognises and rewards measurable circularity performance, encouraging innovation and collaboration among stakeholders to scale sustainable practices across sectors.</p> <p>In parallel, review options to reclassify industrial waste as a “resource” and establish national standards for secondary raw materials</p>	High	NEDP priority sectors	<ul style="list-style-type: none"> Status of revised tax / incentive package for waste reuse and circular economy enterprises (approval and implementation) 	<ul style="list-style-type: none"> No dedicated incentives for circular economy business models 	<ul style="list-style-type: none"> Revised incentive package adopted and in force 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development 	<ul style="list-style-type: none"> Ministry of Industry and Entrepreneurship Development Ministry of Trade, Commerce, Food Security and Cooperative Development Board of Investment
<p>5.2.4. Establish provincial-level sustainability subcommittees linked to the national committee, to provide localised support for SMEs. These</p>	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Number / percentage of provincial 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Number – 9 Percentage – 100% 	<ul style="list-style-type: none"> Sustainable Development Council 	<ul style="list-style-type: none"> Ministry of Public Administration, Provincial

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
bodies will channel regional needs and feedback into national strategies, and convene local government, industry and NGOs to co-design and implement tailored sustainability initiatives addressing province-specific challenges and opportunities.			sustainability subcommittees established				<ul style="list-style-type: none"> Councils and Local Government Ministry of Environment
5.2.5. Conduct targeted value-chain studies in priority sectors to map sustainability and due diligence risks (e.g., EU Deforestation Regulation, Corporate Sustainability Due Diligence Directive, IFRS S1/S2), and use the findings to design phased compliance roadmaps, and pilot traceability systems and tailored support packages for producers, intermediaries, and exporters.	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Number of priority export value chains with completed sustainability / due diligence studies and approved phased compliance roadmaps (including traceability pilots and support measures) 	<ul style="list-style-type: none"> No systematic value-chain studies or roadmaps on ESG 	<ul style="list-style-type: none"> All NEDP priority sectors value chains with completed studies and approved roadmaps under implementation 	<ul style="list-style-type: none"> Relevant institutions based on selected sectors 	<ul style="list-style-type: none"> Sustainable Development Council Export Development Board Relevant line ministries and technical agencies
5.2.6. Promote SME adoption of internationally recognised sustainability reporting frameworks (e.g., Global Reporting Initiative) by designing and delivering targeted capacity-building programmes, including practical trainings, toolkits, and coaching. Support SMEs to apply Global Reporting Initiative standards, leading to strengthened ESG transparency, compliance with emerging requirements in target markets, and improved attractiveness to buyers / investors.	Medium	NEDP priority sectors	<ul style="list-style-type: none"> SMEs participating in structured training / coaching on climate reporting, traceability and new export standards 	<ul style="list-style-type: none"> Limited or no structured programmes; most SMEs lack awareness of new ESG standards and due diligence laws 	<ul style="list-style-type: none"> At least 500 export-oriented SMEs in NEDP priority sectors trained / coached through structured programmes, with follow-up support available 	<ul style="list-style-type: none"> Export Development Board and relevant agencies 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Industrial Development Board Board of Investment
5.2.7. Establish a centralised, national-level sustainability reporting system with digital workflows for priority export value chains, with simplified interfaces for the private sector and government to execute impact reporting, to ease compliance and strengthen visibility.	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Status of centralised data system 	<ul style="list-style-type: none"> Fragmented data; no coordinated national systems; SMEs largely excluded due to cost and complexity 	<ul style="list-style-type: none"> Coordinated traceability and reporting systems operational in all priority sectors, with documented SME participation 	<ul style="list-style-type: none"> Ministry of Industry and Entrepreneurship Development 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Industrial Development Board Export Development Board

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
<p>5.2.8. Integrate NDC 3.0 and Sustainable Development Goal targets into NEDP implementation by developing a national “green export alignment framework” that maps NEDP priorities and sector strategies to NDC / Sustainable Development Goal targets, prepares sector-specific green export roadmaps, and adopts an internationally aligned reporting template (e.g., Global Reporting Initiative).</p>	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Status of NDC 3.0 / Sustainable Development Goal–NEDP alignment framework approved and in use Priority export sectors with green export roadmaps aligned to NDC 3.0 / Sustainable Development Goals 	<ul style="list-style-type: none"> NDC 3.0 climate targets and export targets are developed separately, with no formal roadmaps or coordination mechanism linking climate action and export strategy 	<ul style="list-style-type: none"> Alignment framework developed and approved within Year 1 of NEDP implementation Green export roadmaps prepared for all priority sectors by Year 3 	<ul style="list-style-type: none"> Ministry of Finance, Planning and Economic Development 	<ul style="list-style-type: none"> Board of Investment Sustainable Development Council Ministry of Trade, Commerce, Food Security and Cooperative Development Industrial Development Board Export Development Board Board of Investment
<p>5.2.9. Institute a scheme to help SMEs defray their quality and ESG certification / auditing costs, particularly when overseas testing costs are incurred.</p>	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Number of priority sectors supported by targeted, time-bound subsidy scheme 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Four NEDP priority sectors supported 	<ul style="list-style-type: none"> Export Development Board Relevant agencies 	<ul style="list-style-type: none"> Ministry of Agriculture, Livestock, Land, and Irrigation Ministry of Finance, Planning and Economic Development
<p>5.2.10. Conduct a sector-wide packaging needs assessment across NEDP priority value chains. Map packaging gaps by sector (standards, labelling, design capability, eco-material availability, cost drivers, trade facilitation / import requirements, and investment needs). Based on the findings, develop an export packaging upgrade initiative involving:</p> <ul style="list-style-type: none"> Capacity- building for local packaging providers Technical and financial support programme for exporters, particularly SMEs. 	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Status of packaging needs assessment Number of SMEs supported via the export packing upgrade initiative 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> Assessment completed Up to 500 SMEs supported across NEDP priority sectors by 2030 	<ul style="list-style-type: none"> National Packaging Centre 	<ul style="list-style-type: none"> Export Development Board Ministry of Industry and Entrepreneurship Development / Department of Commerce Board of Investment

Strategic Objective 6: Build a skilled, innovative, and entrepreneur-friendly economy that can generate higher-value, export-oriented growth.

Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
<p>Subobjective 6.1 Strengthen and align Sri Lanka's skills and TVET systems with labour-market and export needs, ensuring a future-ready workforce with market-relevant technical, digital, and soft skills across priority sectors and regions.</p>							
<p>6.1.1. Create a skills council linking industry, TVET providers, higher education and relevant public agencies to reduce skills mismatches and align skills development with the current and future requirements of industries.</p>	High	NEDP priority sectors	<ul style="list-style-type: none"> Existence and functioning of a structured public-private skills platform for export-oriented industries (formal mandate in place and number of meetings held per year) 	<ul style="list-style-type: none"> No platform exists 	<ul style="list-style-type: none"> Platform formally established, and holding at least three multi-stakeholder meetings per year 	<ul style="list-style-type: none"> Ministry of Industries Ministry of Education 	<ul style="list-style-type: none"> Chambers of Commerce Sector associations
<p>6.1.2. Expand investment in teacher training and instructor remuneration, while fast-tracking accreditation and certification for training providers.</p>	Medium	All sectors	<ul style="list-style-type: none"> Share of instructors in TVET and training institutions who have completed upgraded training Operational status of a national accreditation and certification system for training providers 	<ul style="list-style-type: none"> Nil 	<ul style="list-style-type: none"> At least 60% of instructors have completed upgraded training National accreditation system is operational 	<ul style="list-style-type: none"> Tertiary and Vocational Education Commission Ministry of Education 	
<p>6.1.3. Conduct skills assessments for NEDP sectors to understand:</p> <ul style="list-style-type: none"> Skills-mismatch issues Emerging / future industry requirements Detailed technical and resourcing gaps at the TVET level 	High	NEDP priority sectors	<ul style="list-style-type: none"> Status of skills assessment 	<ul style="list-style-type: none"> No assessments 	<ul style="list-style-type: none"> Assessments finished 	<ul style="list-style-type: none"> Ministry of Education / Tertiary and Vocational Education Commission Ministry of Industries 	<ul style="list-style-type: none"> Sector associations
<p>6.1.4. Implement structured national internship and apprenticeship programmes across NEDP priority sectors, including employer incentives (for example, co-funding, tax deductions, or wage subsidies) and standard placement guidelines to increase firm participation and quality training outcomes.</p>	Medium	ALL NEDP sectors, prioritising digital products and services	<ul style="list-style-type: none"> To be determined 	<ul style="list-style-type: none"> To be determined 	<ul style="list-style-type: none"> To be determined 	<ul style="list-style-type: none"> Ministry of Education Relevant ministries 	<ul style="list-style-type: none"> Ministry of Industry and Entrepreneurship Development Ministry of Finance, Planning and Economic Development Sector associations

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
<p>6.2. Develop a coherent, inclusive entrepreneurship ecosystem that simplifies regulations, improves access to support services and finance, and enables start-ups and SMEs nationwide to innovate, scale, and participate in regional and global markets.</p>							
<p>6.2.1. Reduce fragmentation and overlaps in SME support by adopting a common national SME definition, clearly delineating the roles and responsibilities of public institutions involved in SME development, and strengthening one-stop service centres, particularly in the provinces.</p>	High	All sectors	<ul style="list-style-type: none"> Adoption status of a common national SME definition Approved SME coordination framework (including institutional roles and responsibilities) Geographic distribution of SME one-stop service centres, including in provinces 	<ul style="list-style-type: none"> Gampaha District – one-stop shop pilot 	<ul style="list-style-type: none"> Unified SME definition adopted by line ministries and agencies SME coordination framework operational SME one-stop service centres fully operational, with provincial coverage (target to be determined) 	<ul style="list-style-type: none"> National Enterprise Development Authority Ministry of Industry and Entrepreneurship Development 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Ministry of Finance, Planning and Economic Development Central Bank of Sri Lanka
<p>6.2.2. Design and implement structured export readiness programmes for cohorts of SMEs and value-chain actors (producers, aggregators, processors, exporters) in priority sectors. Programmes will combine practical training and advisory support, with tailored mentoring and follow-up to help participating firms move from basic readiness to active export participation.</p>	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Number of SMEs and value-chain actors in priority sectors completing structured export readiness programmes each year, and share of participating firms that initiate or expand exports within 12 months of completion 	Nil	<ul style="list-style-type: none"> By 2030, at least 300 firms have been supported, with a minimum of 30% reporting new or higher export sales within 12 months 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Industry and Entrepreneurship Development Industrial Development Board Department of Export Agriculture Relevant sector agencies
<p>6.3. Build a dynamic national innovation system that promotes R&D, fosters university-industry collaboration, and accelerates the translation of ideas and technologies into commercially viable, export-oriented products and services.</p>							
<p>6.3.1. Revise the national R&D strategy for Sri Lanka, coupled with an implementable plan that includes NEDP priority sectors.</p>	High	All sectors	<ul style="list-style-type: none"> Status of R&D strategy 	<ul style="list-style-type: none"> No strategy exists 	<ul style="list-style-type: none"> R&D strategy launched 	<ul style="list-style-type: none"> Ministry of Science and Technology 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development Export Development Board President's office

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
							<ul style="list-style-type: none"> National Enterprise Development Authority National Intellectual Property Office Ministry of Education
6.3.2. Re-establish the working group on GI to ensure coherence and acceleration in pursuing GI status for sectors with comparative advantages.	High	All sectors relevant for GI status	<ul style="list-style-type: none"> Status of the GI working group 	<ul style="list-style-type: none"> Working group discontinued following the end of funding support 	<ul style="list-style-type: none"> Working group established 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> National Intellectual Property Office Other relevant ministries
6.3.3. Systematically identify and register more Sri Lankan export products for GI certification, leveraging successful cases like Ceylon cinnamon as models. In tandem, conduct nationwide awareness campaigns and targeted training for stakeholder groups on the benefits and requirements of GI certification.	High	NEDP priority sectors	<ul style="list-style-type: none"> GI registrations secured during the NEDP period GI awareness and training programmes conducted with National Intellectual Property Office technical input 	<ul style="list-style-type: none"> At consultation stage (Ceylon Tea) At discussion stage (Ceylon Pepper, Ceylon Sapphires, Pineapple) At internal discussion stage (TJC Mango and King Coconut) Legal application of GI under process (Ceylon Kithul) 	<ul style="list-style-type: none"> GI status secured for <ul style="list-style-type: none"> Ceylon Tea Ceylon Pepper Ceylon Sapphires Pineapple Ceylon Kithul TJC Mango King Coconut At least 10 nationwide GI awareness campaigns 	<ul style="list-style-type: none"> Export Development Board 	<ul style="list-style-type: none"> Ministry of Trade, Commerce, Food Security and Cooperative Development National Intellectual Property Office Other relevant ministries
6.3.4. Establish an exporter-facing IP and collaboration support facility to help firms negotiate and formalise non-disclosure agreements and joint venture / OEM agreements that protect proprietary technical information, designs and moulds. Provide standard templates and advisory support to secure buyer collaboration terms, safeguard tailor-made specifications, and restrict the use and disclosure of sensitive technology and know-how to the partnership.	High	NEDP priority sectors	<ul style="list-style-type: none"> Number of exporters supported to put in place IP-protective collaboration agreements (non-disclosure agreement + joint venture / OEM clauses / templates) with buyers / partners 	<ul style="list-style-type: none"> Nil – new initiative 	<ul style="list-style-type: none"> At least 25 exporters supported annually via the facility 	<ul style="list-style-type: none"> Sri Lanka Inventors Commission 	<ul style="list-style-type: none"> Ministry of Science and Technology

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
6.3.5. Strengthen and continue the digitalisation process and streamline IP registration, and strengthen confidentiality protections.	Medium	All sectors	<ul style="list-style-type: none"> IP registration processes digitised end-to-end Average processing time for IP applications by category IP applications submitted through online platforms Adoption and implementation of strengthened confidentiality and data protection protocols 	<ul style="list-style-type: none"> World Intellectual Property Organization-National Intellectual Property Office digitisation project started Trademarks – 10 months for registration (including three months' opposition period); Patents – one year for grant of a patent, including three months of opposition period after gazette publication; Industrial designs – five months for registration, including two months of opposition period after gazette publication 60% To comply with Data Protection Act and IP Act 	<ul style="list-style-type: none"> Fully digitised IP registration processes, including e-filings of IP applications Trademarks – six months for registration (including 3 months' opposition period); Patents – one year for grant of a patent, including three months of opposition period after gazette publication; Industrial designs – five months for registration, including two months of opposition period after gazette publication 60% To comply with Data Protection Act and IP Act 	<ul style="list-style-type: none"> National Intellectual Property Office Sri Lanka Inventors Commission 	<ul style="list-style-type: none"> Other relevant ministries
6.3.6. Launch targeted awareness initiatives on patents, trademarks, and copyrights within academic and research communities, to broaden the focus from pure research and publications to commercialisation, and to raise awareness of available institutional support.	Medium	All sectors	<ul style="list-style-type: none"> IP awareness and advisory programmes conducted for universities and research development institutions Patent applications filed by universities and public research development institutions 	<ul style="list-style-type: none"> 15 Students: 64 Individual: 154 Other: 83 	<ul style="list-style-type: none"> 25 Students: 90 Individual: 200 Other: 110 	<ul style="list-style-type: none"> National Intellectual Property Office (IP registration) Ministry of Higher Education + Ministry of Science and Technology (commercialisation, licensing, 	<ul style="list-style-type: none"> Other relevant ministries

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Action	Priority	Sectors	Indicators	Baseline	Targets	Lead implementing agencies	Supporting actors
6.3.7. Support the Sri Lanka Inventors Commission's network of incubators ² to strengthen their technical and financial infrastructure, and to expand and upgrade their service offerings to start-ups and SMEs.	Medium	NEDP priority sectors	<ul style="list-style-type: none"> Innovators assisted on technical and quality enhancement of products Number of start-ups created per year 	<ul style="list-style-type: none"> Limited start-ups incubated via existing programmes (early stages of development). Existing firms include Buddhi International Engineering (Pvt) Ltd, Napronet (Pvt) Ltd, Jack Fruit Ceylon (Pvt) Ltd, SZS.lk 	<ul style="list-style-type: none"> Assist more than 200 innovators in product improvement, quality enhancement and capacity development Create 100 start-ups 	<ul style="list-style-type: none"> Sri Lanka Inventors Commission 	<ul style="list-style-type: none"> Ministry of Science and Technology Universities and tertiary education institutes Ministry of Education, Higher Education and Vocational Education
6.3.8. Launch a national outreach programme (including a national patent fair) to attract and register domestic and international investors to support local inventions.	Medium	All sectors	<ul style="list-style-type: none"> Start-ups connected with investors and/or mentors 	<ul style="list-style-type: none"> Patents are in progress for 20 innovations which will be converted to new start-ups 	<ul style="list-style-type: none"> At least 100 start-ups connected with investors or mentors via programme events in 2030 	<ul style="list-style-type: none"> Sri Lanka Inventors Commission National Intellectual Property Office 	<ul style="list-style-type: none"> Export Development Board Board of Investment Ministry of Science and Technology
6.3.9. Promote structured collaboration between industry, research institutions, individual inventors, and public institutions, creating a matching platform that connects export value chain challenges with inventors who can solve them.	Medium	All sectors	<ul style="list-style-type: none"> Export value chain innovation challenges that lead to a formal collaboration (memorandum of understanding, contract or pilot project) between firms and inventors / research institutions 	<ul style="list-style-type: none"> No ad hoc collaborations 	<ul style="list-style-type: none"> At least 40 new collaboration projects by 2030 	<ul style="list-style-type: none"> Ministry of Science and Technology Sri Lanka Inventors Commission 	<ul style="list-style-type: none"> Other relevant ministries President's office Ministry of Trade, Commerce, Food Security and Cooperative Development

²Four incubators – National Engineering R&D Centre, University of Jaffna, Rajarata University and University of Ruhuna.

ANNEXES

NATIONAL EXPORT DEVELOPMENT PLAN APPROACH AND METHODOLOGY

The National Export Development Plan (NEDP) 2026–2030 has been developed as an implementable, realistic and action-oriented strategy to drive Sri Lanka’s export-led economic transformation. It provides a clear Plan of Action, supported by an appropriate governance and monitoring framework to track implementation progress and impact, and is designed to generate early momentum while sustaining medium-term reforms. The NEDP adopts an inclusive and participatory approach, grounded in extensive engagement with public institutions, the private sector, and regional stakeholders; and is fully aligned with Sri Lanka’s national development priorities.

The NEDP is a logical continuation of the National Export Strategy (NES) 2018–2022. It assesses progress made since 2018 and builds on the strategic foundations established by the NES, while acknowledging that all national plans must be updated at the end of their implementation timeframes. The NEDP is thus not a reflection of the success or failure of the NES, but rather a required refresh to include lessons learned from the 2018–2022 period while also responding to the dynamic global trade environment.

Overall approach

The NEDP was formulated using a structured process. The first step included a **detailed assessment of Sri Lanka's export performance**, current global trade trends, and the changing policy and regulatory backdrop influencing export competitiveness. This was supplemented with an evaluation of the previous NES to identify implementation challenges, coordination issues, and areas where anticipated changes did not translate into results.

Following the initial assessment, a detailed and **structured consultation process was undertaken with stakeholders** across Sri Lanka’s export ecosystem to identify key constraints along export value chains, as well as the priority interventions and cross-sector enablers required to address them. Detailed in-person diagnostic workshops were held in Colombo and Kandy, enabling national-level engagement as well as regional outreach beyond the Western Province. These consultations included participation from relevant government ministries and agencies, private sector representatives, exporters, industry organisations, small and medium-sized enterprises (SMEs), and other key stakeholders. To broaden outreach and capture perspectives beyond workshop participants, a survey of private-sector exporters and export-ready firms across goods and services sectors was conducted. Inputs from these engagements directly informed sector prioritisation, the identification of cross-sector constraints, and the design of interventions

The findings from these consultations were subsequently refined and deliberated through the **Technical Committee, which served as the principal technical body guiding the NEDP formulation process**. The Technical Committee comprising key government agencies, trade institutions, development partners, and private sector representatives provided strategic direction, validated analytical findings, assessed implementation feasibility, and helped translate priorities into actionable recommendations.

Sector shortlisting

The sector shortlisting process for the NEDP was designed to ensure that priority sectors were identified through a transparent, evidence-based, and implementation-conscious framework, while **maintaining strategic continuity with the NES 2018–2022**. The NEDP adopts a selective approach to prioritisation, focusing on sectors where targeted interventions can deliver the greatest export impact within the 2026–2030 timeframe.

Sector shortlisting followed a two-stage approach, combining **quantitative assessment with qualitative filtering**. The goods sectors were defined using the Harmonized System at an aggregated level, while services sectors were grouped using functional trade classifications.

The quantitative assessment included evaluation of **both demand-side and supply-side factors** for export potential and competitiveness in Sri Lanka. The supply-side assessment included evaluation of Sri Lanka's existing and latent capacity to export goods and services competitively, including stability of export performance over time, comparative advantage at global and regional level, and the degree of integration into the GVC through backward or forward links. The analysis also included which sectors in Sri Lanka have opportunities to increase exports of existing products, move up the value chain, and gradually diversify into new products based on current strengths.

The demand-side assessment included the extent to which external market conditions are conducive to sustained export growth. This included analysis of global and regional import demand trends, with particular attention to Sri Lanka's priority sectors, as well as market access conditions such as tariff and non-tariff barriers. Together, these indicators helped identify sectors where international demand is growing, accessible, and aligned with Sri Lanka's export capabilities. This assessment provided an initial list of sectors demonstrating varying degrees of competitiveness, growth, and diversification potential.

The sectors were then **chosen by the Technical Committee** based on qualitative criteria such as alignment with Sri Lanka's national priorities, employment and inclusiveness potential, environmental and sustainability readiness, and the feasibility of achieving results within the NEDP implementation cycle, among others.

STAKEHOLDERS

Export Development Board Representatives – National Export Development Plan 2026–2030	
Mr. Mangala Wijesinghe	Chair / Chief Executive Officer
Mr. E.L.K. Dissanayake	Acting Director General
Ms. Kumudinie Mudalige	Additional Director General – Development
Directors	
Ms. Manoja Dissanayake	Director – Industrial Products
Mrs. Indumini Kodikara	Director – Export Services
Mr. Janak Sanjeewa Badugama	Director – Export Agriculture
Dr. S.U. Rathnasekera	Director – Trade Facilitation and Trade Information
Ms. Rika Gaffoor	Director – Human Resources Management
Mr. Kusal Dishantha Perera	Director – Finance
Ms. Thakshila Wijayarathne	Director – Legal
Ms. K.K.S. Kannangara	Acting Director – Market Developments
Mr. D.M.P. Dissanayake	Acting Director – Regional Development
Mr. D.K.D.S. Sisil	Acting Director – Information Technology
Policy and Strategic Planning Officials	
Ms. Nandika Tharangani	Acting Director
Ms. Shavindya Sumanasekara	Assistant Director
Ms. Chathuri Pasqual	Assistant Director
Ms. Dulanjali Bandara	Assistant Director
Ms. Madhushika Munasinghe	Assistant Director
Ms. Champa Abeysinghe	Statistical Officer
EDB Officials	
Deputy Directors	
Assistant Directors	
Export Promotion Officers	

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Stakeholder Participants			
No.	Name	Position	Organisation
1	Mr. Rajatha Medawewa	Head of Cargo and Airfreight Management	Airport and Aviation Services (Sri Lanka) (Pvt.) Ltd
2	Ms. Yolani Fernando	Executive Director	Arutha
3	Ms. Rehana Thowfeek	Director	Arutha
4	Mrs. Yasitha Aluthgedara	Chief Manager, Trade Services Division	Bank of Ceylon
5	Mr. T. Vinopa	Director	Board of Investment (BOI)
6	Mr. Upul Jayasinghe	Senior Deputy Director – Investment Promotion and Research	BOI
7	Mr. Viran Fernando	Senior Deputy Director	BOI
8	Ms. Chamari Samaraweera	Deputy Director (Investment Appraisal)	BOI
9	Ms. Priyanka Samaraweera	Executive Director (Investment Promotion)	BOI
10	Ms. Sugandhi Gunaratne	Assistant Director	BOI
11	Mr. Sidath Wimalananda	Senior Manager (Business and Operations)	Bureau Veritas
12	Mr. B.S. Jayathilake	Assistant Manager	Bureau Veritas
13	Ms. Rukshana S. De Silva Jayathilake	Director – Bank Supervision	Central Bank of Sri Lanka
14	Mr. W.S. Prasanna	Director, Department of Foreign Exchange	Central Bank of Sri Lanka
15	Dr. (Mrs.) S. Jegajeevan	Director, Economic Research Department	Central Bank of Sri Lanka
16	Ms. Virangi Samarathunge	Senior Assistant Director, Bank Supervision	Central Bank of Sri Lanka
17	Ms. T. Chandrakanthan	Economist	Central Bank of Sri Lanka
18	Ms. Kusala Mahalekama	Director	Central Environment Authority
19	Mr. C.K. Amarakoon	Deputy Chief Secretary	Central Provincial Council
20	Mrs. Mona Chondon	Senior Vice President	Central Provincial Women’s Chamber
21	Mr. Jayantha Samarakoon	President	Ceylon Chamber of Coconut Industries
22	Mr. Ranil De Saram	Secretary General	Ceylon Chamber of Coconut Industries
23	Mr. Dinesh de Silva	Trade Facilitation Expert	Ceylon Chamber of Commerce
24	Ms. Saumya Amarasiriwardhana	Economist	Ceylon Chamber of Commerce
25	A.N. Sugathapala	Vice Chair	Ceylon National Chamber of Industries
26	Mr. Sudesh Mendis	Managing Director	Ceylon National Chamber of Industries
27	Mr. Farhath Amith	Director	Ceylon National Chamber of Industries
28	Mr. Kaushal Rajapaksa	Chair	Chamber of Marine Industries of Sri Lanka
29	Mr. G.B. Herath	Senior Advisor	Chamber of Marine Industries of Sri Lanka
30	Dr. Sandun Dalpatadu	Secretary	Chamber of Mineral Exporters

Stakeholder Participants			
No.	Name	Position	Organisation
31	Mr. Tharanga Wijayasinghe	Managing Director, JK Garments	Chamber of Lankan Entrepreneurs
32	Mr. Chinthaka Abeysekera	Managing Director, Sisili Projects Consortium Ltd	Chamber of Lankan Entrepreneurs
33	Ms. Nuranga Adhikari	Manager, R&D Planning	Civil Aviation Authority of Sri Lanka
34	Mrs. Wathsala Anuradhi Hathurusinghe	Director, Marketing Development and Research	Coconut Development Authority
35	Mr. K.A.N.P. Kanugala	Director	Coconut Development Authority
36	Mr. Ashoka Pushpakumara	Deputy Director, Quality Control and Quality Assurance	Coconut Development Authority
37	Ms. Tamara Bernard	Deputy General Manager – International	Commercial Bank of Ceylon PLC
38	Ms. Rekha Mallikarachchi	Minister (Commercial)	Consulate General of Sri Lanka in Los Angeles, US
39	Ms. N.S.D. Jeganathan	Director	Consumer Affairs Authority
40	Mr. B.A.T.T. Wijedasa	Trainee Quality Assurance Executive	Country Style Foods Pvt (Ltd)
41	Mr. Sumith Siriwardane	General Manager	Courtaulds Clothing Pvt Ltd
42	Mr. Pushpika Jayasundera	Director General Manager	Credit Information Bureau (CRIB)
43	Dr. A. Manoraj	Scientist, Medical Officer	Department of Ayurveda
44	Mr. R.A.A.K. Ranawaka	Deputy Director	Department of Cinnamon Development
45	Mr. Anil Sirimanna	Deputy Director of Commerce	Department of Commerce
46	Mr. Yasantha Yaddehi	Acting Director	Department of Commerce
47	Ms. D.G. Niluka Kumari	Director	Department of Development Finance
48	Mr. S.B.U.S.K. Ranaweera	Additional Director General (Development)	Department of Export Agriculture
49	Mr. Prasad Idamekorala	Director (Regulation)	Department of Export Agriculture
50	Ms. U.P.M. de Silva	Deputy Director	Department of Export Agriculture
51	Ms. Sandamali Herath	Director – Quality Control	Department of Fisheries and Aquatic Resources
52	Mr. M. Marcus	Director	Department of Fisheries and Aquatic Resources
53	Mr. Gihan Sachintha	Quality Control Officer	Department of Fisheries and Aquatic Resources
54	Mr. H.G. Wasantha	Conservator / Forester	Department of Forest Conservation
55	Mr. N.A. Jayantha	Forester (Export)	Department of Forest Conservation
56	Ms. M. Balasooriya	Deputy Controller	Department of Import and Export Control
57	Mr. M.B.U.S. Consiwaththa	Provincial Director	Department of Industry Development
58	Mr. J.M.S.P.B. Jayasekara	Director	Department of National Planning
59	Mr. J.M.S.P.B. Jayathilake	Director	Department of National Planning
60	Ms. G.R.S.S. Thilakarathna	Deputy Director	Department of National Planning
61	Ms. K.P.P. Siriwardana	Director	Department of National Planning
62	Ms. W. Uthpala	Director	Department of Rural Development

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Stakeholder Participants			
No.	Name	Position	Organisation
63	Ms. W.P. Kalyani	Director	Department of Samurdhi Development
64	Mr. M.G.S.S. Kithsiri	Director	Department of Samurdhi Development
65	Mr. R.K.R. Ranaweera	Additional Director General	Department of Trade and Investment Policy
66	Mr. Wasula Rangoda	Regulatory Affairs Manager	DHL
67	Ms. W.S.C. Ranasinghe	Deputy Director	District Secretariat – Kegalle
68	Dr. Kulathunga Rajapaksa	Emeritus Managing Director	DSI Samson Group
69	Mr. Shahid Sangani	Chief Executive Officer	Dynawash Ltd
70	Mrs. Prasadi Boomawalage	First Secretary (Commercial)	Embassy of Sri Lanka, France
71	Mr. Sanjeewa Ranasinghe Bandara	First Secretary (Commercial)	Embassy of Sri Lanka, Russia
72	Mr. Dulip Karunathilaka	Sales / Business Development Manager	Elastomeric Engineering Co. Ltd
73	Mr. Talal Rafi	Director	Ernst & Young
74	Mr. Sudesh Bandara	Deputy Centre Manager	ESOFT University
75	Mr. Jagath Pathirane	Director	Expolanka Holdings Ltd
76	Mr. Yohan Lawrence	Chair	Exporters Association of Sri Lanka
77	Mr. Rajkumar Kanagasigam	President	Fintech Association of Sri Lanka
78	Mr. A.F.A. Faslan	Chief Executive Officer	Fits Express (Pvt) Ltd
79	Mr. Indika De Zoysa	Former President	Federation of Information Technology Industry Sri Lanka
80	Mr. Tilan Wijesooriya	Secretary General	Federation of Chambers of Commerce and Industry of Sri Lanka
81	Ms. Srikanthi Rihera	Assistant Director of Agriculture	Food Research Unit – Gannoruwa
82	Mr. M.P. Punchihewa	Chair	Freeport Operators Association of Sri Lanka
83	Mr. Rohan Masakorala	Secretary General	Freeport Operators Association of Sri Lanka
84	Mr. Dhammika Fernando	Chair	Free Trade Zone Manufacturers' Association
85	Mr. Vasantha Dias	Secretary General	Free Trade Zone Manufacturers' Association
86	Mr. Beauno Fernando	Executive	Free Trade Zone Manufacturers' Association
87	Mr. Anuraj Sivarajah	Chair	Good Gift Property Developers
88	Mr. Winter John Alexander	Export Manager	Global Vinyl (Pvt) Ltd
89	Mrs. W.K.K. Shanthilatha	Secretary	Hambantota Women's Development Federation
90	Mrs. S.K.N. Priyanka	Training Manager	Hambantota Women's Development Federation
91	Mr. Mevan Peris	Chief Executive Officer	Hatch Pvt. Ltd
92	Mr. Ruwan Waidyaratne	Managing Director	Hayleys Advantis Limited
93	Mr. Asanka Wijesundara	General Manager	Hayleys Advantis Ltd

Stakeholder Participants			
No.	Name	Position	Organisation
94	Mr. Stanley Perera	Programme Manager	International College of Business and Technology
95	Mr. M.G. Bandula	Director - Marketing	Industrial Development Board
96	Mr. B.K.M.D. Kumara	Acting Director	Industrial Development Board - Matale
97	Ms. Sithara Withanage	Assistant Director - Marketing	Industrial Development Board
98	Mr. Samantha De Alwis	Assistant Director	Industrial Development Board - Matale
99	Mr. L.J.C Gunathilake	Assistant Director	Industrial Development Board - Kandy
100	Mr. V.G.T. Gunarathne	Entrepreneur Promotion Officer	Industrial Development Board - Kegalle
101	Mr. Yasantha Karannagoda	Assistant Director, Laboratory Services	Industrial Services Bureau
102	Prof. S. Malavipathirana	Chair	Industrial Technology Institute
103	Dr. P Ranasinghe	Director - Science & Technology Business Centre	Industrial Technology Institute
104	Dr. Hans Wijayasuriya	President	Information Communication Technology Agency of Sri Lanka
105	Mr. Asanka Wijesinghe	Research Fellow	Institute of Policy Studies
106	Ms. Rashmi Anupama	Research Assistant	Institute of Policy Studies
107	Mr. Shanil Fernando	Chair	International Chamber of Commerce Sri Lanka
108	Mr. Sudesh Mendis	Managing Director	International Chamber of Commerce Sri Lanka
109	Ms. Champa Afa	Senior Manager	International Chamber of Commerce Sri Lanka
110	Mr. Nanda Kohona	Marketing Director	Samagi Spice Exports (Pvt) Ltd
111	Mr. Rohitha Sumanaweera	Chief Executive Officer	Kiyota
112	Mr. Conrad Dias	Chair	LOLC Finance PLC
113	Ms. Rupika Navaratna	Assistant General Manager	Macksons Holdings
114	Mr. Biju Ravi	Managing Director	Maersk
115	Mr. Christopher Fernando	Executive Director	Malwatte Valley plantations
116	Mr. G.K. Welagedara	Director	Matale District Chamber
117	Mr. Maliek De Alwis	Chief Executive Officer	Ma's Tropical Food Processing (Pvt) Ltd
118	Mr. Ricky Barnett	Group Director – Business Development & Strategy	McLarens Holdings Limited
119	Ms. M.C.S. Devasurendra	Director (Planning)	Ministry of Agriculture, Livestock, Land and Irrigation
120	Mr. Anura Palugaswewa	Director (SSD)	Ministry of Education, Higher Education and Vocational Education
121	Ms. A.G.N. Nadeeka Gamage	Development Officer	Ministry of Environment
122	Ms. P. Kumudini	Programme Officer	Ministry of Environment/Climate Change Secretariat
123	Mr. Neelakanth Wanninayake	Project Director, Trade National Single Window Systems Project	Ministry of Finance, Planning and Economic Development
124	Ms. Buddhika Wimalasena	Deputy Director / EA(B)	Ministry of Foreign Affairs, Foreign Employment and Tourism

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Stakeholder Participants			
No.	Name	Position	Organisation
125	Mr. Pasan Kavikeshanka	Assistant Director	Ministry of Foreign Affairs, Foreign Employment and Tourism
126	Ms. Dharshika Pothuwewa	Assistant Director	Ministry of Foreign Affairs, Foreign Employment and Tourism
127	Mrs. H.M.A.U. Herath	Additional Secretary, Entrepreneurship Development	Ministry of Industry and Entrepreneurship Development
128	Ms. Nalini Balasubramaniam	Director	Ministry of Industry and Entrepreneurship Development
129	Mr. Nishan Jayarathna	Deputy Director	Ministry of Industry and Entrepreneurship Development
130	Ms. B. Kunalini	Assistant Director	Ministry of Industry and Entrepreneurship Development
131	Mr. H.M.A.B. Herath	Industrial Development Officer	Ministry of Industry and Entrepreneurship Development
132	Mr. P.D. Chandana Pathirage	Director (Development)	Ministry of Labour
133	Mr. J.M.C. Priyadarshani	Assistant Director	Ministry of Plantation and Community Infrastructure
134	Ms. R.P. Hettiarachchi	Director	Ministry of Ports and Civil Aviation
135	Ms. Dulhani Zoysa	Director – Planning	Ministry of Science and Technology
136	Mr. B.H.M.D. Herath	Director, Trade and Research	Ministry of Trade, Commerce, Food Security and Co-operative Development
137	Ms. Inoka De Alwis	Director (International Trade)	Ministry of Trade, Commerce, Food Security and Co-operative Development
138	Mr. Kumudhu Meegahage	Director	Ministry of Trade, Commerce, Food Security and Co-operative Development
139	Mr. Nalaka Dissanayaka	Project Director/ Greater Colombo Urban Transport Development Project	Ministry of Transport, Highways, and Urban Development
140	Mr. A.R. Mudalige	Fish Genetic Specialist	National Aquaculture Development Authority of Sri Lanka
141	Mr. Arjuna Yatawara	Chair – Export Industries Committee	National Chamber of Commerce
142	Mr. Dumindu Karunagoda	Committee Member	The National Chamber of Commerce
143	Mr. Shiham Marikar	Secretary General	National Chamber of Exporters of Sri Lanka
144	Mr. Dilshan Rajapaksa	Vice President	National Chamber of Exporters of Sri Lanka
145	Ms. Nilrukshi De Silva	Vice President	National Chamber of Exporters of Sri Lanka
146	Ms. Dilini Gamlathge	Director	National Chamber of Exporters of Sri Lanka
147	Mr. Lakshman Abeysekera	Chair	National Enterprise Development Authority
148	Mr. Shashika De Mel	Assistant Director (EP)	National Enterprise Development Authority
149	Mr. Nalin Dias	Assistant Director	National Enterprise Development Authority

Stakeholder Participants			
No.	Name	Position	Organisation
150	Mrs. T.M.N. Damayanthi	DC	National Enterprise Development Authority – Kandy
151	Mrs. H.S. Hettihelage	Director General (Acting)	National Intellectual Property Office
152	Mr. Nalinda Atapattu	Director (Acting)	National Intellectual Property Office
153	Mr. Prasanga Panditha Sundara	Assistant Director – Legal	National Intellectual Property Office
154	Ms. Darshani Ranasinghe	Assistant Director	National Productivity Secretariat
155	Mr. Nawarathnew Hettiarachchi	President	Nuwara-eliya District Chamber of Commerce, Industry and Agriculture
156	Dr. B. Suthaharan	Manager	Palmyrah Development Board
157	Dr. Dayaratna Silva	Executive Director	Pathfinder Foundation
158	Mr. Suthadar	Chief Manager	People’s Bank
159	Mr. Thiyagarajah Suthagar	Chief Manager	People's Bank
160	Mr. Dilan Paranavithana	Operations Director	Polycrome
161	Ms. Noor Rizna Anees	Additional Secretary	Presidential Secretariat
162	Mr. M. Ajmac	Managing Director	Quikpak Pvt. Ltd
163	Mr. Charith Nilaweera	Assistant Manager Marketing	Richard Peris Exports PLC
164	Ms. Sagari Kudaligama	Head of Department	Rubber Research Institute
165	Ms. Uthpala Wijekoon	Director	Rural Development Bureau
166	Ms. Nilu Mediwake	President / Director	SALOTA International
167	Mr. Viraj De Silva	Managing Director	SDS Spices (Pvt) Ltd
168	Ms. Malshani Dahanayaka	Assistant Manager, Capital Market Development Department	Securities and Exchange Commission
169	Mr. H Chrishantha Alexander	Managing Director	Seylon Aquatics (Pvt) Ltd
170	Mr. Sanjeeva Niroshan	B D Manager	SGS Lanka Pvt Ltd
171	Mr. Pramod Jayasinghe	Executive Sustainability	SGS Lanka (Pvt) Ltd
172	Ms. Shehani Senevirathne	Chair	Sri Lanka Association of Software Services Companies (SLASSCOM)
173	Mr. Haridhu Abeygoonaratne	Vice Chair 2	SLASSCOM
174	Mr. Sampath Jayasundara	Director	SLASSCOM
175	Ms. Chamindā de Silva	Executive Director	SLASSCOM
176	Mr. Indrajith Boyagoda	Secretary General	Sri Lanka Banks’ Association
177	Mr. M.S.S. Fernando	Director (Engineering)	Sri Lanka Standards Institution
178	Ms. K.R.N. Malkanthi	Assistant Director	Small Enterprises Development Department – Matale
179	Mr. N.N. Suwandarathne	Assistant Director	Small Enterprises Development Department – Matale
180	Mr. Jayantha Dahanayake	Assistant Director	Small Enterprises Development Department – Kandy
181	Mr. D.P. Daluwatta	Director General	Southern Provincial Development Authority

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Stakeholder Participants			
No.	Name	Position	Organisation
182	Mr. M. Jeewantha	First Vice Chair	Spices and Allied Products Producers and Traders Association
183	Mr. Christopher Fernando	Former Chair	Spices and Allied Products Producers and Traders Association
184	Mr. W. Chathura	Committee Member	Spices and Allied Products Producers and Traders Association
185	Ms. Tharangi Mudalige	Assistant Director (Accreditation)	Sri Lanka Accreditation Board
186	Mr. Sean Van Dort	Chair, Logistics	Sri Lanka Apparel Exporters Association
187	Dr. Sisira Ranathunga	Director General	Sri Lanka Association of Manufacturers and Exporters of Rubber Products
188	Mr. Channa De Silva	Secretary	Sri Lanka Association of Manufacturers and Exporters of Rubber Products
189	Mr. Mohideen Cader	Committee member	Sri Lanka Association of Manufacturers and Exporters of Rubber Products
190	Mr. Justin Senevirathne	Former President	Sri Lanka Association of Manufacturers and Exporters of Rubber Products
191	Mr. Dimantha Jayawardena	President	Sri Lanka Automotive Component Manufacturers' Association
192	Mr. T. Illeperuma	Deputy Director	Sri Lanka Customs
193	Ms. D.N.T. Fernando	Deputy Director	Sri Lanka Customs
194	Mr. G.J. Senarathne	Senior Deputy Director	Sri Lanka Customs
195	Mr. R.P.A.P. Wijesinghe	Deputy Director	Sri Lanka Customs
196	Mr. T.M.A.P.I. Ranasinghe	Deputy Director	Sri Lanka Customs
197	Ms. K.P.D.C.H. Kaushalya	Deputy Director	Sri Lanka Customs
198	Mr. Gamini Ranasinghe	President	Sri Lanka Electronic Manufacturers and Exporters Association
199	Mr. Mohan Silva	DGM - Operations	Sri Lanka Export Credit Insurance Corporation
200	Ms. Indira Malwatte	EX-EDB Chair	Sri Lanka Export Development Board
201	Mr. Suresh de Mel	EX-EDB Chair	Sri Lanka Export Development Board
202	Mr. Shavidra Dias	Treasurer	Sri Lanka Logistics and Freight Forwarders Association
203	Prof. Veranja Karunaratne	Commissioner	Sri Lanka Inventors Commission
204	Mr. N.N.W. Dolawatta	Director/Chief Executive Officer	Sri Lanka Inventors Commission
205	Ms. Pubudu Liyanagama	Assistant Director – SPD	Sri Lanka Inventors Commission
206	Ms. Zavis Miskin	Director (Logistics)	Sri Lanka Ports Authority
207	Mr. C. Jayaweera	Chief Manager	Sri Lanka Ports Authority
208	Mr. Trisherman Frink	Chair	Sri Lanka Shippers' Council
209	Mr. Nalaka Rathnayake	Vice Chair	Sri Lanka Shippers Council
210	Mr. Chullanté Jayasuriya	Representative	Sri Lanka Shippers Council
211	Mr. Leelanath Wickramaarachchi	Director General	Sri Lanka Tea Board
212	Mr. W.Y.N. Upul Priyantha	Deputy Director – Promotion (CU)	Sri Lanka Tea Board

Stakeholder Participants			
No.	Name	Position	Organisation
213	Ms. Anusha Damayanthi	Director – Human Resources	Sri Lanka Tourism Promotion Bureau
214	Mr. Asela Mendis	Assistant Director Tourism Planning and Development	Sri Lanka Tourism Promotion Bureau
215	Mr. Thushara Wijesuriya	Senior Manager – WWCD	Sri Lankan Airlines
216	Ms. S.L. Hewawaduge	Assistant Director	Sustainable Development Council
217	Mr. Vipulesh Thiyagarajah	Chief Strategy Officer	Taian Lanka Steel
218	Mr. Dilan Fernando	Chair	Taprobane Seafoods
219	Mr. Ranjith Abeykoon	Secretary General	Tea Exporters Association
220	Mr. Birendra Perera	Vice Chair	Tea Exporters Association
221	Mr. Manjula Vidanapathirana	Director	Tertiary and Vocational Education Commission
222	Mr. T. Senthuran	Director (Planning and Research)	Tertiary and Vocational Education Commission
223	Mr. I.P. Liyanage	Vice President-IFAB	Trade Finance Association of Bankers (NDB Bank)
224	Dr. A. Mithurson	Lecturer – Department of Surgery	University of Jaffna
225	Prof. S.S. Kodithuwakku	Senior Professor	University of Peradeniya
226	Prof. Y.P.R.D. Yapa	Director / BLII-TTO	University of Peradeniya
227	Ms. Subhashini Abeyasinghe	Research Director	Verité Research
228	Mr. Chandana Widanapathirana	Director (Career Guidance, Promotion and Industrial Relations)	Vocational Training Authority
229	Mr. Senarath Bandara	Chief Executive Officer	Wayamba Chamber of Commerce and Industry (WCCI)
230	Ms. Gayani de Alwis	Chair	Women's Chamber of Industry and Commerce Sri Lanka
231	Ms. Tusitha Kumarakulasingam	Second Vice Chair	Women's Chamber of Industry and Commerce Sri Lanka
232	Ms. Eranthi Premaratne	Board Member	Women's Chamber of Industry and Commerce Sri Lanka
233	Mr. Manjulal Waas	Senior Manager	Zone24x7

National Export Development Plan (NEDP)

Technical Committee Members			
No	Name	Designation	Organization
1	Dr. Nandika Sanath Kumanayake	Secretary to the President	Presidential Secretariat
2	Mrs. J.M. Thilaka Jayasundara	Secretary	MOIED
3	Mr. K.A. Vimalenthirarajah	Secretary	Ministry of Trade, Commerce, Food Security and Co-operative Development
4	Ms. Anoja Herath	Additional Secretary	MOIED
5	Ms. Noor Rizna Aneez	Additional Secretary- Economic Affairs Division	Presidential Secretariat
6	Ms. Aameena Shafi Mohin	Director General of Commerce	Department of Commerce
7	Mr. Anil Sirimanna	Deputy Director of Commerce	Department of Commerce
8	Mr. M.K. Pradeep Kumara	Director General	Department of Trade and Investment Policy
9	Mr. Suranga Kumara	Director	Department of Trade and Investment Policy
10	Mr. P. Kuruparan	Assistant Director	Department of Trade and Investment Policy
11	Ms. J.M.S.D. Rathnayake	Director General	Department of National Planning
12	Mr. Saliya Jayathilaka	Director	Department of National Planning
13	Ms. K.P.P. Siriwardana	Director	Department of National Planning
14	Seevali P. Arukgoda	Director General	Sri Lanka Customs
15	Mr. T. Illeperuma	Deputy Director	Sri Lanka Customs
16	Mr. D.H. Hettiarachchi	Deputy Director	Sri Lanka Customs
17	Mr. Arjuna Herath	Chair	BOI
18	Mrs. Renuka M. Weerakone	Director General	BOI
19	Dr. Lasantha Wickremesooriya	Strategy Expert + Leadership	
20	Dr. Asanka Wijesinghe	Research Fellow	Institute of Policy Studies
21	Ms. Rashmi Anupama	Research Assistant	Institute of Policy Studies
22	Mr. Chamil Wickremasinghe	Chief Executive Officer	Sri Lanka Institute of Marketing
23	Mr. Buwanekabahu Perera	Secretary General / Chief Executive Officer	Ceylon Chamber of Commerce
24	Ms. Saumya Amarasiriwardena	Economist	Ceylon Chamber of Commerce
25	Mr. Dinesh De Silva	Trade Facilitation Expert	Ceylon Chamber of Commerce
26	Mrs. Nilupul Chandrasena	Secretary General / Chief Executive Officer	National Chamber of Commerce of Sri Lanka
27	Mr. Shiham Marikar	Secretary General / Chief Executive Officer	National Chamber of Exporters of Sri Lanka
28	Mr. Keerthi Gunawardane	President	Federation of Chambers of Commerce and Industry of Sri Lanka
29	Mr. Tilan M. Wijesooriya	Secretary General	Federation of Chambers of Commerce and Industry of Sri Lanka
30	Ms. Gayani de Alwis	Chair	Women's Chamber of Industry and Commerce
31	Mr. Manjula Wijesundera	Chair	Chamber of Lankan Entrepreneurs

Technical Committee Members			
No	Name	Designation	Organization
32	Mr. Tharanga Wijayasinghe	Director	Chamber of Lankan Entrepreneurs / JK Garments
33	Mr. Chinthaka Abeysekera	Managing Director/Sisili	Chamber of Lankan Entrepreneurs / Sisili Projects
34	Mr. Nalaka Ratnayake	Vice Chair	Exporters' Association of Sri Lanka
35	Mr. Fazal Mushin	Former Chair	Exporters' Association of Sri Lanka

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