



Department of
Census and
Statistics



Ministry of
Economics Policies and
Plan Implementation

2018 - 2019

SURVEY OF
CONSTRUCTION
INDUSTRIES

FINAL REPORT

SURVEY OF CONSTRUCTION INDUSTRIES -2018/19

FINAL REPORT

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DEPARTMENT OF CENSUS AND STATISTICS

MINISTRY OF ECONOMICS POLICIES AND PLAN IMPLEMENTATION

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PREFACE

The Department of Census and Statistics (DCS) conducted a Survey on Construction Industries for the first time, in 1993 on the request of Institute for Construction Training and Development (ICTAD) to produce important statistics related to the sector. The indicators produced by this survey were used for the planning purposes of the functions of ICTAD which presently functions in the name of Construction Development Authority (CIDA). There were requests from other agencies too to be continue this survey to monitor the projects implemented and to develop the sector in the country. Therefore, the Department had to include this survey to its regular annual surveys to produce statistics required on the construction sector the development of the country.

DCS has been conducting this survey annually with some exception where this was conducted biennially. This is the 20th survey on construction industry which was conducted by the DCS. It gives data on input, output, value added, labor engaged in the sector etc.; which are very important for economic policy makers as well as construction industries itself. Moreover, the indicators compiled from this survey provide valuable information on the sector and are used to estimate the Gross Domestic Product (GDP) of the country. According to the Survey of Construction Industries 2018/19, the total estimated Value Added by all type of construction activities in Sri Lanka was Rs.193,603 million. The limitation is the coverage.

Hope the findings of this report would be very useful to make evidence-based decisions in Development of the country.



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The planning and implementation of the survey activities were carried out by Mrs. G.D.N. Munasinghe, Statistician with the support of Mrs. W.M.B.K. Nawarathne, statistical officer under the supervision and technical inputs of Mrs. U. Maheshwaran, Director of Industry, Construction, Trade & Services Division of the Department of Census & Statistics. Contributions made by following officers are acknowledged with great appreciation.

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- Mr.R.M.P.Dharmapriya, ICT Assistant, in preparing data entry programme.

Data collection was done by the District Statistical Officers/ Statistical Assistants under the supervision of District heads of the Statistics Units. Follow up activities with the non-responding industries for data collection were carried out by the staff of Industry, Construction, Trade & Services Division under the supervision of Senior Statisticians and Statisticians of the Division.

The contribution made by the printing division of the Department of Census and Statistics in printing this report is acknowledged with gratitude. Finally, the construction industries that extended their support to the DCS, by providing their valuable information are highly appreciated.

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Value of work done by type of construction activity in the past 4 years

Type of Construction Activity	Value of work done							
	2015/16		2016/17		2017/18		2018/19	
	Rs. Mn.	%	Rs. Mn.	%	Rs. Mn.	%	Rs. Mn.	%
Construction of buildings	87,357	32.7	140,900	44.1	104,766	33.8	134,967	42.7
Construction of roads and railways	94,755	35.5	106,030	33.2	128,374	41.4	138,963	43.9
Construction of utility projects	24,834	9.3	52,642	16.5	57,774	18.6	29,529	9.3
Construction of other civil engineering projects	34,524	12.9	7,520	2.4	2,467	0.8	7,246	2.3
Demolition and site preparation	1,124	0.4	73	0.0	1,163	0.4	229	0.1
Electrical, plumbing and other construction installation activities	9,880	3.7	9,064	2.8	12,719	4.1	2,558	0.8
Building completion and finishing	4,011	1.5	3,089	1.0	2,817	0.9	1,560	0.5
Other specialized construction activities	10,630	4.0	314	0.1	186	0.1	1,396	0.4
Total	267,115	100.0	319,632	100.0	310,266	100.0	316,448	100.0

Important Indicators of all construction activities in the past 4 years

Indicator	All construction activities (Rs. Mn)			
	2015/16	2016/17	2017/18	2018/19
Value of Contract	567,873	714,195	898,894	870,284
Value of Work Done	267,115	319,632	310,266	316,448
Intermediate Consumption	189,422	144,994	177,744	144,994
Value Added	113,007	231,257	174,229	193,603
Raw Materials	103,420	82,064	107,758	84,759
Wages & Salaries	55,352	28,692	21,265	34,875

1. INTRODUCTION

BACKGROUND

A survey on construction industries was conducted in 1993 for the first time in Sri Lanka by the Department of Census and Statistics (DCS) on the request of ICTAD (Institute for Construction Training and Development) presently CIDA (Construction Industry Development Authority). Since then the DCS has been conducting this survey annually but in some instances once in two years for providing important statistical indicators related to the construction sector of the country.

Though it is expected to give indicators that represent the country this survey has some limitations in coverage. The practical difficulties in obtaining a frame of construction activities carried out in the country has resulted to use the list of contractors registered in the CIDA to be used as the sample frame.

The construction activities carried out through foreign companies may not be in the CIDA registration list. But the sub contracts given by foreign projects to local contractors registered in the CIDA are covered. Collecting data by projects and the expenditure by sub contracts were difficult when approaching the industries, therefore the statistics available at the industry level was used to do the analysis.

This Construction Survey (2018/19) is the 20th in the series of construction surveys the Department has conducted so far.

SCOPE AND COVERAGE

The coverage is all construction activities undertaken by the private, government and semi-government contractors who were registered with CIDA. For the data collection process, the activities were categorized according to the following classification.

1. Construction of buildings
2. Construction of roads and railways
3. Construction of utility projects
4. Construction of other civil engineering projects
5. Demolition and site preparation
6. Electrical, plumbing and other construction installation activities
7. Building completion and finishing
8. Other specialized construction activities

The construction activities done in their own by the householders and the construction activities were not in function during 2018/19 were not covered in this survey.

2. METHODOLOGY

FRAME

This survey was done covering the establishments registered with CIDA for the year 2018. Enumeration was done in two ways; a full enumeration of large contractors and covering a sample drawn from other industries (SMEs). The number of establishments considered for full enumeration was 656 and the sample was 348.

COVERAGE

The data were collected by the type of construction activities the category of which is mentioned above. It was observed that the contractors were unable to provide information such as intermediate consumption for different type of activities they carried out to calculate value added during the reference year 2018/19. Therefore, the questionnaire was simplified to collect data required, for the survey to avoid the burden of the respondents and to get the maximum information from the establishments for data analysis.

INFORMATION COLLECTED

- ♣ Total value of contract
- ♣ Value of work done
- ♣ Value of raw materials consumed
- ♣ Employment and salaries
- ♣ Expenditure for other services
- ♣ Receipts for other services

METHOD OF DATA COLLECTION

Officers of the DCS were sent to the establishments to assist the respondents in filling the questionnaire. It was a tedious task for the officers who were entrusted with this responsibility to get appointment to see the particular respondent of the industry, as they do not like to spend their time to provide necessary information. The response rate of this survey was very low and several attempts were taken to improve this situation.

CONCEPTS AND DEFINITIONS

Reference Period

Data collected for this survey is related to the construction activities carried out during the calendar year 2018 or financial year (2018 April to 2019 March).

Employment

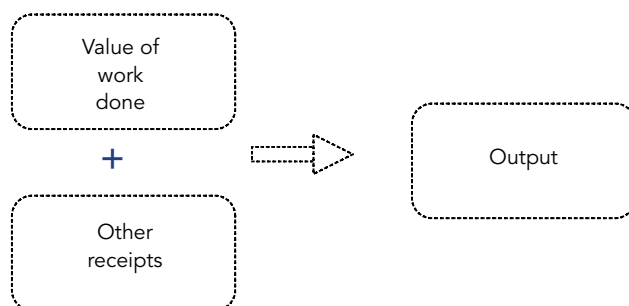
This refers to the average number of persons engaged in construction activities during the reference period, including working proprietors/ active partners, unpaid family workers, operatives, administration/ managerial, technical/ supervisory, clerical and related and all other paid workers.

Salaries & Wages

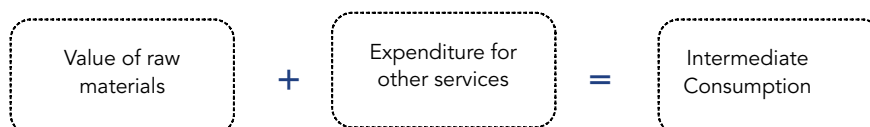
Amounts paid as salaries, wages or sub-contract for the work done during the period.

Output

Value of the work done during the year 2018 (18/19 if financial year is considered)

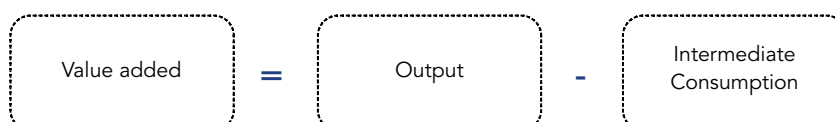


Intermediate Consumption



Value Added

Value added has been defined as the difference between the value of output and value of intermediate consumption.



3. SURVEY RESULTS

It should be mentioned that the frame of the survey included the construction industries registered with CIDA in 2018. The results may be excluding the construction industries recently commenced if they are not registered with the CIDA.

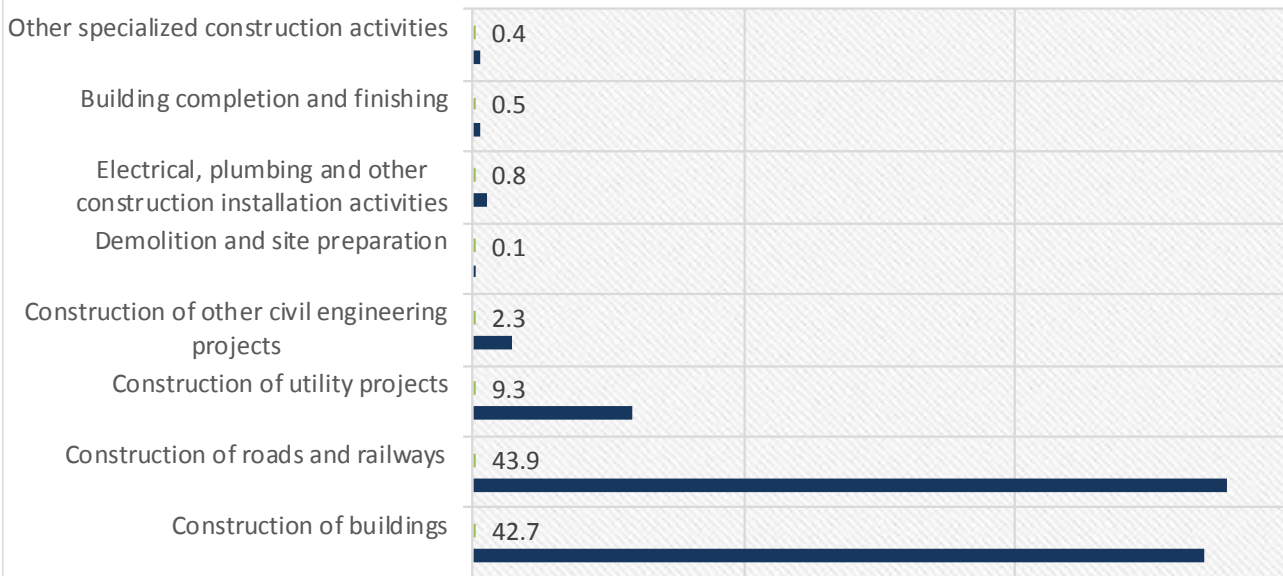
The data analysis reveals the performance of the construction industry during the year 2018/19. The economic related indicators compiled from this survey are described below.

- Total estimated value of work done by all type of construction activities in Sri Lanka was Rs. 316,448 Million.
- The highest contribution (43.9%) to this total value has been made by the construction of roads & railways, which was Rs. 138,963 Million.
- The value of work done for construction of buildings was Rs. 134,967 Mn, the percentage of which to the total is around 42.7%.
- Demolition and site preparation recorded the lowest rate (0.1%) to the total work done during the year 2018/19.

Table 3.1 : Distribution of Value of work done by type of construction activity - 2018/19

Type of Construction Activity	Value of work done (Rs. Mn)	%
Construction of buildings	134,967	42.7
Construction of roads and railways	138,963	43.9
Construction of utility projects	29,529	9.3
Construction of other civil engineering projects	7,246	2.3
Demolition and site preparation	229	0.1
Electrical, plumbing and other construction installation activities	2,558	0.8
Building completion and finishing	1,560	0.5
Other specialized construction activities	1,396	0.4
Total	316,448	100.0

Figure 3.1
Distribution of Value of work done by type of construction activity - 2018/19



Source:
 Department of Census and Statistics, Sri Lanka



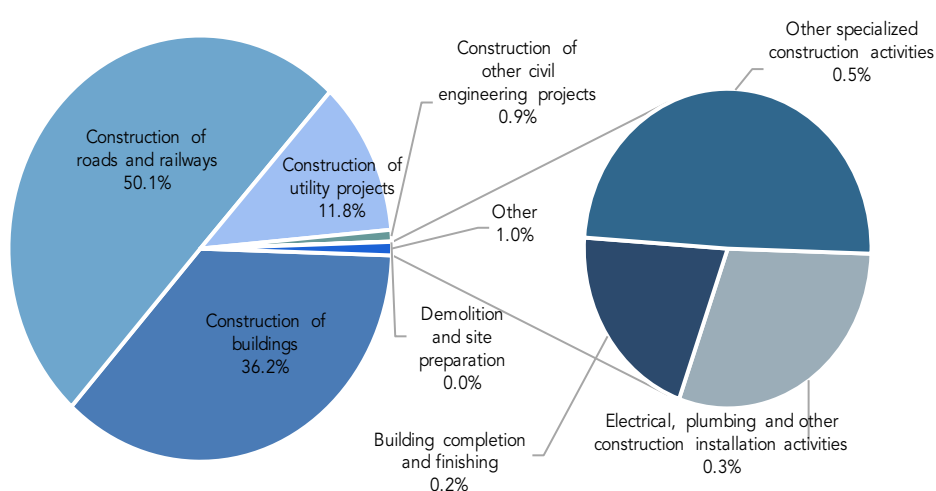
Total value of contract : The total value of the project is termed as the value of contract as the data collection is done from the contractors. This contract may take more than one year. The value of work done during the reference year is a part of the total value of the contract in some projects which last for more than one year.

Table 3.2: Distribution of Total Contract Value by type of construction activity - 2018/19

Type of Construction Activity	Value of Contract (Rs. Mn)	%
Construction of buildings	315,137	36.2
Construction of roads and railways	436,117	50.1
Construction of utility projects	102,335	11.8
Construction of other civil engineering projects	7,673	0.9
Demolition and site preparation	229	0.0
Electrical, plumbing and other construction installation activities	2,636	0.3
Building completion and finishing	1,812	0.2
Other specialized construction activities	4,344	0.5
Total	870,284	100.0

Table 3.2 and figure 3.2 present the distribution of total contract value by type of construction activity in the year 2018/19. Construction of roads & railways records the highest value of contracts (Rs. Mn. 436,117) which is 50.1 percentage to the total contract value followed by construction of buildings activity (36.2%). The value of this activity reported as Rs. Mn. 315,137.

Figure 3.2
Distribution of Total Contract Value by type of construction activity - 2018/19



Source:
Department of Census and Statistics, Sri Lanka

Table 3.3 : Share of value of work done for the total value of contract by type of construction activity - 2018/19

Type of Construction Activity	Value of Contract (Rs. Mn)	Value of work done (Rs. Mn)	%
Construction of buildings	315,137	134,967	42.8
Construction of roads and railways	436,117	138,963	31.9
Construction of utility projects	102,335	29,529	28.9
Construction of other civil engineering projects	7,673	7,246	94.4
Demolition and site preparation	229	229	100.0
Electrical, plumbing and other construction installation activities	2,636	2,558	97.0
Building completion and finishing	1,812	1,560	86.1
Other specialized construction activities	4,344	1,396	32.1
Total	870,284	316,448	36.4

This shows out of the value of total contracts of Rs. 870,284 in the year 2018/2019, only 36.4% work were completed. Table 3.3 further reveals that only about one third of the work done during the year out of the roads & railways construction activities which is the largest value of contract Rs. 436,117 Mn. (31.9 percent). Lowest percentage of work done was recorded from the construction of utility projects (28.9 percent).

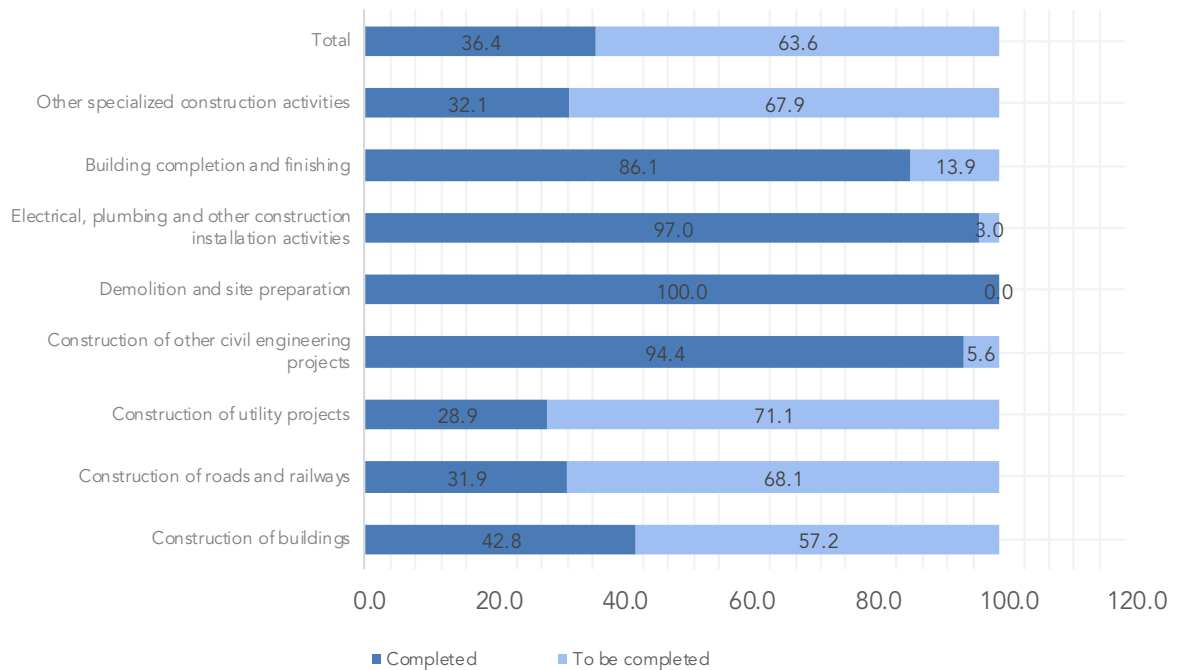
Electrical, plumbing and other construction installation, construction of other civil engineering projects and building completion and finishing activities were observed being completed more than 85 percent of

the contracts undertaken and other specialized construction activities have been completed nearly one third of the project.

The contracts related to the demolition and site preparation were 100% complete.

Figure 3.3

Share of value of work done for the total value of contract by type of construction activity 2018 - 19



Source:
Department of Census and Statistics, Sri Lanka

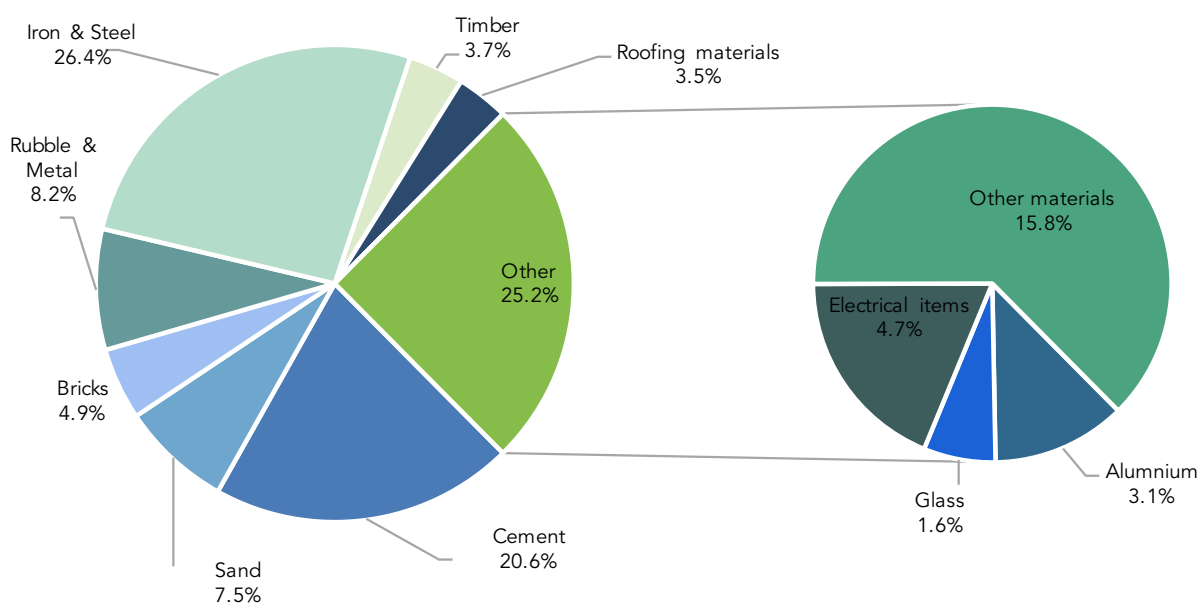


Table 3.4: Value of Raw Materials consumed for all Construction Activities - 2018/19

Type of raw material	Value (Rs. Mn)	%
Cement	17,424	20.6
Sand	6,336	7.5
Bricks	4,136	4.9
Rubble & Metal	6,953	8.2
Iron & Steel	22,394	26.4
Timber	3,177	3.7
Roofing materials	3,004	3.5
Aluminum	2,586	3.1
Glass	1,388	1.6
Electrical items	4,000	4.7
Other materials	13,361	15.8
Total	84,759	100.0

Table 3.4 shows the value of raw materials consumed for all construction activities during the year 2018/19. The highest percentage (26.4%) recorded from iron & steel. It was more than one fourth of the total materials consumed. The percentage value of cement consumed to the all-construction activities was 20.6 while the consumption of sand, bricks, timber and rubble & metal consumed were 7.5, 4.9, 3.7 and 8.2 percentages respectively. Other materials consumed was 15.8%.

Figure 3.4
Value of Raw Materials consumed of all Construction Activities - 2018/19



Source:
Department of Census and Statistics, Sri Lanka



4. STATISTICAL APPENDIX

Table 4.1 : Some Selected Indicators of by Type of Construction Activity - 2018/19

	Type of Construction Activity	No. of Activities	Total Value of Contract (Rs.)	Value of work done (Rs.)
410 - Construction of buildings	41001 : Residential buildings	1,296	117,634,864,928	44,785,421,896
	41002 : Non residential buildings	1,461	192,752,977,675	86,062,678,726
	41003 : Both residential & non residential buildings	280	2,168,386,256	1,981,269,819
	41004 : Remodeling or renovating existing residential structures	517	2,580,608,804	2,137,215,598
	Group total	3,554	315,136,837,663	134,966,586,039
421 - Construction of Roads & Railways	42101 : Construction of roads	1,258	345,421,732,842	122,870,734,833
	42102 : Construction of railways	6	912,619,338	912,619,338
	42103 : Construction of bridges, tunnels	124	89,782,731,753	15,180,000,562
	Group total	1,388	436,117,083,933	138,963,354,733
422 - Construction of utility projects	42201 : Construction of pipelines, power lines & communication lines	54	97,080,031,388	25,636,031,629
	42202 : Construction of irrigation systems (canals) & reservoirs	216	3,478,959,771	2,812,874,566
	42203 : Construction of sewer systems, including repair	131	396,136,290	367,114,365
	42205 : Construction of power plants	6	1,350,000,000	683,094,480
	42206 : Construction of communication towers	9	30,281,214	30,281,214
	Group total	416	102,335,408,663	29,529,396,254
429 - Construction of other civil engineering projects	42901 : Construction of industrial facilities, except buildings, such as refineries, chemical plants	5	575,986,257	506,996,350
	42902 : Construction of waterways, harbour & river works, pleasure ports (marinas), locks, etc.	14	710,484,397	694,287,240
	42903 : Dredging of waterways	2	5,685,208,354	5,685,208,354
	42904 : Construction work of outdoor sports facilities	5	23,592,593	23,592,593
	42909 : Construction of other civil engineering n.e.c	10	677,651,034	336,177,017
	Group total	36	7,672,922,635	7,246,261,554

Table 4.1 : Some Selected Indicators of by Type of Construction Activity - 2018/19

Type of Construction Activity		No. of Activities	Total Value of Contract (Rs.)	Value of work done (Rs.)
431 - Demolition and site preparation	43110 : Demolition or wrecking of buildings and other structures	7	48,058,325	48,058,325
	43122 : Site preparation for other construction, site preparation for mining and for drainage	20	181,173,913	181,173,913
	Group total	27	229,232,238	229,232,238
432 - Electrical, plumbing and other construction installation activities	43211 : Installation of electrical wiring & fittings	120	1,102,358,078	1,064,110,252
	43219 : Other electrical installation (including alarm systems) n.e.c	2	670,590,059	670,590,059
	43222 : Installation of ventilation, refrigeration or air-conditioning equipment, non-electric solar energy collectors & ducts	13	231,759,749	231,759,749
	43299 : Other construction installation n.e.c	100	631,657,895	591,552,632
	Group total	235	2,636,365,781	2,558,012,692
433 - Building completion & finishing	43302 : Installation of aluminium & other steel fittings of buildings (doors, windows, door & window frames, ceilings, partitions etc.)	120	66,339,990	66,339,990
	43304 : Tiling; laying terrazzos, marbles, granite etc.	6	302,956,020	50,882,910
	43307 : Installation of fittings of steel, stainless steel (staircase frames, balcony fences etc.)	20	15,401,292	15,401,292
	43308 : Other Installation of grill gates, grill works for windows etc	20	36,234,783	36,234,783
	43309 : Other building completion work n.e.c (installations of glass mirrors, furniture, cleaning of buildings after construction etc.)	10	1,390,879,910	1,390,879,910
	Group total	176	1,811,811,995	1,559,738,885
439 - Other specialized construction activities	43901 : Construction of foundations, including pile driving	3	3,976,564,923	1,028,529,873
	43909 : Other specialized construction activities n.e.c.	11	367,662,857	367,158,842
	Group total	14	4,344,227,779	1,395,688,715
Total		5,846	870,283,890,686	316,448,271,111

Table 4.2 : Average No. of Employees & Salaries Classified by type of Employee Category - 2018/19

Employee Categories		Male	Female	Total	Wages & Salaries (Rs.)
Working Proprietors/ Active Partners		3,645	467	4,112	**
Unpaid Family Workers		1,463	530	1,993	**
Operators		11,545	1,486	13,031	4,209,219,103
Other Employees	Administrative/Managerial	5,134	504	5,638	3,733,863,164
	Technical/ Supervisory	10,444	1,185	11,628	6,299,578,944
	Clerical & related	5,424	1,932	7,356	6,071,651,012
	Other	75,177	1,611	76,788	14,560,359,155
Total		112,832	7,715	120,548	34,874,671,377

** not relevant

Table 4.3 : Number of construction activities by Type & Value of Work Done Size Category - 2018/19

Value of Work Done Size Category (Rs.)	All Activities	No. of Activities							
		410 - Construction of buildings	421 - Construction of roads & railways	422 - Construction of utility projects	429 - Construction of other civil engineering projects	431 - Demolition & site preparation	432 - Electrical, plumbing & other construction installation activities	433 - Building completion & finishing	439 - Other specialized construction activities
Less than 100,000	-	-	-	-	-	-	-	-	-
100,000 - 999,999	535	116	179	105	5	5	-	120	5
1,000,000 - 9,999,999	3,670	2,285	912	196	10	20	201	46	-
10,000,000 - 99,999,999	1,379	1,043	201	80	10	2	33	5	5
100,000,000 - 499,000,000	212	99	72	22	10	-	2	5	2
500,000,000 & above	50	11	23	12	2	-	-	-	2
Total	5,846	3,554	1,387	415	37	27	236	176	14

Table 4.4 : Number of Establishments by Type of Legal Organization - 2018/19

Type of Legal Organization	No. of Establishments
sole Ownership	3405
Partnership	468
Private Limited Liability Co.	130
Public Limited Liability Co.	112
Co-operative Society	100
Total	4215

Table 4.5 : Number of establishments by persons engaged size category - 2018/19

Persons engaged size category	No. of Establishments
Less than 10	2,795
10 - 19	930
20 - 49	231
50 - 99	72
100 & above	188
Total	4,215

DCS

2018 - 2019

SURVEY OF CONSTRUCTION INDUSTRIES

FINAL REPORT

THE VISION OF DCS

“To be the leader in the region in producing timely statistical information to achieve the country

THE MISSION OF DCS

“Making contribution in the socioeconomic development of the country by providing accurate timely statistics, more Effectively by means of new technology, and utilising the services of dedicated staff under a strategic leadership to become a prosperous nation in the globalised environment.”

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