



DCS

Ministry of
Finance, Planning and
Economic Development
Sri Lanka

Department of
Census and
Statistics

ANNUAL SURVEY OF
CONSTRUCTION INDUSTRIES
2020-2021
FINAL REPORT

ANNUAL SURVEY OF CONSTRUCTION
INDUSTRIES -2020/21

FINAL REPORT

DEPARTMENT OF CENSUS AND STATISTICS

MINISTRY OF FINANCE, PLANNING AND ECONOMIC DEVELOPMENT

ISBN 978-624-6716-53-0

PREFACE

In 1993, the Department of Census and Statistics (DCS) conducted its first Survey on Construction Industries at the request of Institute for Construction Training and Development (ICTAD). Currently this Institute renamed as Construction Industry Development Authority (CIDA). The findings of the survey highlight the need for its continued implementation in order to produce key economic and labour-related indicators for the national construction sector. Consequently, the Department has undertaken this survey on a regular basis.

DCS has been conducting this survey annually and in some instances it was biennial. This is the 22nd survey on construction industry which was conducted by the DCS. It gives data on intermediate Consumption, value added, labour engaged in the sector etc.; which are very important for economic policy makers as well as construction industries itself. Moreover, the data obtained from this survey is essential for compiling the country's Gross Domestic Product (GDP). The contribution of construction sector to the GDP is an important indicator which is estimated based on survey findings. According to the Survey of Construction Industries 2020/21, the total estimated Value Added by all type of construction activities in Sri Lanka was Rs.166,327million.

This report presents estimates exclusively for construction activities registered under CIDA, using information provided by the sector for the reference year 2020. The findings are expected to support evidence-based decision-making at the national level.

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2026

ACKNOWLEDGEMENT

This report was prepared with the valuable guidance of Mrs. D.D.G.A.Seneviratne former Director General; Mrs. K.M.D.S.D.Karunaratne, Director General; and Mrs.U.V.Jayakody Additional Director General of the Department of Census and Statistics.

The planning and implementation of the survey activities were carried out by Mrs. G.D.N. Munasinghe and Mr. A.Jayathilaka Statisticians with the support of Mrs. A.J.Kodithuwakku Statistical Officer under the supervision and technical advices of Mr. E.M.M.K.Ekanayaka Deputy Director of Industry, Construction, Trade & Services Division of the Department of Census and Statistics. The Contributions made by the following officers are acknowledged with great appreciation

- Dr.J.S.N.P. Dharmawardana, Deputy Director, for selecting sample for the survey.
- Ms. R.G. Indika, Development Officer & Mr. Rajesh Kanna, Tamil Coding Clerk, for editing , coding and data entry.
- Mr.R.M.P.Dharmapriya, ICT Assistant,for preparing data entry programme.
- Mrs. M.F.F.Janeera, ICT Assistant, for assisting in the preparation of the Report.

Data collection was conducted by the District Statistical Officers and Statistical Assistants under the supervision of District Deputy Director, Senior Statisticians and Statisticians. Follow up data collection was carried out by the staff of Industry, Construction, Trade & Services Division under the supervision of Deputy Directors and Statisticians of the Division.

The contribution of the Printing Division of the Department of Census and Statistics in printing this report is gratefully acknowledged.

Finally, the respondents from the selected construction firms who supported the DCS by providing valuable information are sincerely appreciated.

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Chapter 1

INTRODUCTION

1.1 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.

Although the survey is expected to provide indicators that represent the entire country, it faces certain limitations in terms of coverage. Due to practical challenges in obtaining a comprehensive list of all construction activities taking place across the country, the survey has to rely on the list of contractors registered with the Construction Industry Development Authority (CIDA) as the sampling 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 the sub contracts were not met in this survey.

This Construction Survey (2020/21) is the 22nd in the series of construction surveys the DCS has conducted so far.

1.2 Scope and Coverage

This survey covers 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 on their own by the householders and the construction activities were not in function during 2020/21 were not covered in this survey.

1.3 Survey Challenges and Context

The Survey of Construction Industries 2020/21 was conducted during an exceptionally difficult period in Sri Lanka's recent history. Launched in 2022, the survey coincided with the dual shocks of the COVID-19 pandemic and a deepening economic crisis, both of which had significant implications for the data collection process and the broader functioning of the construction sector.

1.4 Impact of the COVID-19 Pandemic

The global pandemic disrupted nearly every aspect of economic life. In Sri Lanka, strict lockdowns, travel restrictions, and quarantine measures severely constrained the mobility of field officers, delayed data collection schedules, and in some cases, made it impossible to contact respondents. Many contractors had temporarily shut down operations, with project sites remaining inactive or indefinitely suspended due to health concerns, labour shortages, or material import restrictions.

In Particular, the construction industry, which relies heavily on physical labour, on-site operations, and frequent movement of personnel and materials, was disproportionately affected. Project offices were closed or operating on skeletal staff, and many site managers or administrative officers were either working remotely or unavailable, making face-to-face interviews and field verifications exceptionally challenging during the data collection phase.

1.5 Operational Disruptions and Data Availability

The economic crisis that occurred alongside the pandemic caused severe shortage of foreign currency, fuel, and construction materials, leading to project delays, contract cancellations, and downsizing. Many companies faced sharp declines in income, which led to cost-cutting measures including the layoff of workers, especially clerical and accounting staff who typically maintain records.

As a result, data quality and availability were significantly compromised:

- Several establishments were unable to provide complete financial records, especially on income and intermediate consumption.
- Some contractors had shifted operations informally or delayed bookkeeping, resulting in under reporting or inconsistencies.

- Smaller establishments/contractors, in particular, struggled with poor documentation due to the informal nature of operations and limited digital infrastructure.

1.6 Human Resource and Survey Burden Challenges

Adding to these constraints, the response rate from the industry was lower than expected. Many establishments viewed survey participation as an additional burden during a time when they were already under pressure to survive. In some cases, our field officers had to make multiple visits or follow-ups to collect basic information. The reallocation of employees to other industries or informal sectors further complicated verification of employment data.

To mitigate these issues, the Department of Census and Statistics adopted several measures:

- Simplification of survey instruments to reduce respondent burden;
- Greater reliance on telephonic and electronic follow-ups;
- Focus on establishments registered with the Construction Industry Development Authority (CIDA) as a stable sampling frame;
- Enhanced internal validation procedures to ensure data consistency and reliability in the face of partial responses.

Despite these significant challenges, the survey was completed successfully, providing a snapshot of an industry in transition and crisis. The results must be interpreted with caution, bearing in mind the severe constraints under which data were collected. Nevertheless, the findings offer critical insights into the resilience, restructuring, and policy needs of the construction sector in Sri Lanka during one of its most testing periods.

Chapter 2

METHODOLOGY

2.1 Frame

This survey was done covering the establishments registered with CIDA for the year 2020 by two approaches, a full enumeration of large contractors and a sample drawn from others for enumeration. The number of establishments considered for full enumeration was 474 and the sample was 274.

2.2 Coverage

The data were collected according to the different construction activities mentioned above. It was observed that the contractors were not be able to provide information such as intermediate consumption to calculate value added for different type of activities they carried out during the reference year 2020/21. Therefore the questionnaire was simplified to collect necessary data, for the survey to avoid the burden of the respondents and to get the maximum information from the establishments for data analysis.

2.3 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

2.4 Method of Data Collection

Officers of the DCS visited deployed to the establishments to collect information with their assistance. 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 not interest to spend their time to provide necessary information. The response rate of this survey was very low and several attempts were taken to mitigate this issue.

2.5 Concepts and Definitions

Reference Period

Data collected for this survey is related to the construction activities carried out during the calendar year 2020 or financial year (2020 April to 2021 March).

Employment

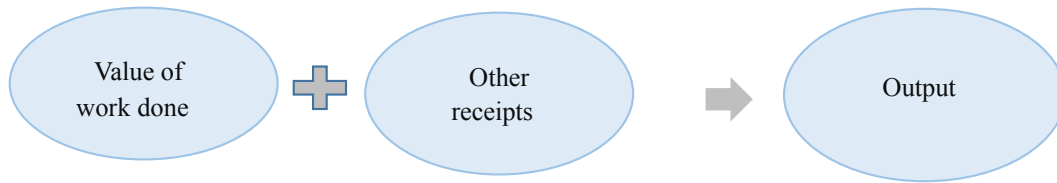
This refers to the average number of persons engaged in construction activities during the reference period, including working proprietors, active partners, unpaid family workers, operatives, administration/managerial, technical/ supervisory, clerical and related and all other paid workers.

Salaries Wages

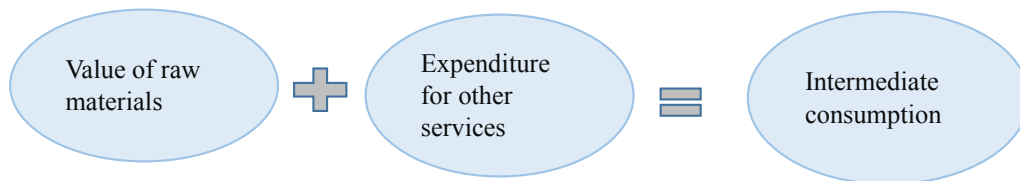
Amounts paid as salaries, wages or sub-contract for the work done during the period.

Output

Value of the work done during the year 2020 (20/21 if financial year is considered)

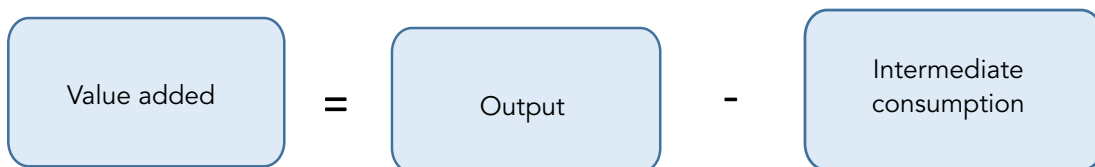


Intermediate Consumption



Value Added

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



Chapter 3

SURVEY RESULTS

It should be mentioned that the frame of the survey included the construction industries registered with CIDA in 2020. The results may be excluding the construction industries recently commenced if they are not registered with the CIDA.

The Survey of Construction Industries 2020/21 sheds light on key transformations in Sri Lanka's construction sector amidst economic and operational challenges, particularly under the shadow of the COVID-19 pandemic.

3.1 Sectorial Contraction and Shifting Priorities

According to the Table 3.1 The overall value of work done in the sector declined by 10.7%, from Rs. 340,683 million in 2019/20 to Rs. 304,273 million in 2020/21. This notable contraction suggests either fewer projects being executed or significant delays and scaling-down of ongoing projects. Table 3.2 and Figure 3.1 provide evidence of a marked reallocation of resources within the sector.

"While building construction declined by 17.9% in absolute terms (from Rs. 147,714 million to Rs. 121,185 million), infrastructure projects such as roads and railways surged in value, raising their share of total work from 32.7% to 49.8%".

This shift indicates a government-driven prioritization of economic recovery Through public infrastructure development.

3.2 Decline in Project Initiation

According to the Table 3.3 The total value of awarded contracts also saw a reduction of 10% (Rs. 596,730 million in 2019/20 to Rs. 537,364 million in 2020/21). This decline signifies a broader slowdown in new project initiation, likely due to funding constraints, uncertainty, or strategic withholding of investments. Table 3.4 reflects this across all major categories.

The dominance of infrastructure persists in new contracts too, with roads and railways making up 43.3% of total contracts, suggesting continuity in long-term capital investment in transport networks. However, utility projects critical for energy, water, and communication appear underfunded, with just 15% of the contract value share, which may have future implications for sustainable development.

Table 3.1 : Value of work done by type of construction activity in last 5 years

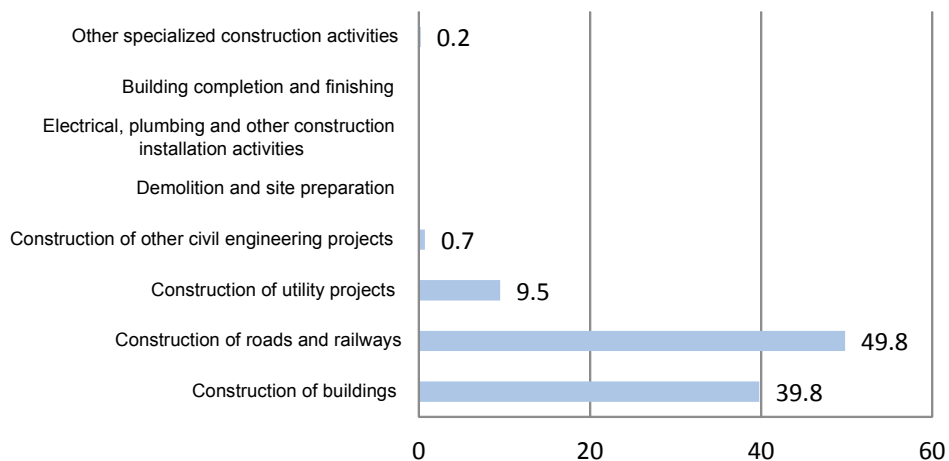
Type of Construction Activity	Value of work done									
	2016/17		2017/18		2018/19		2019/20		2020/21	
	Rs. Mn.	%	Rs. Mn.	%	Rs. Mn.	%	Rs. Mn.	%	Rs. Mn.	%
Construction of buildings	140,900	44.1	104,766	33.8	134,967	42.7	147,714	43.4	121,185	39.8
Construction of roads and railways	106,030	33.2	128,374	41.4	138,963	43.9	111,493	32.7	151,508	49.8
Construction of utility projects	52,642	16.5	57,774	18.6	29,529	9.3	53,344	15.7	28,853	9.5
Construction of other civil engineering projects	7,520	2.4	2,467	0.8	7,246	2.3	2,769	0.8	1,966	0.7
Demolition and site preparation	73	0.0	1,163	0.4	229	0.1	132	0.0	0	0
Electrical, plumbing and other construction installation activities	9,064	2.8	12,719	4.1	2,558	0.8	24,523	7.2	74	0
Building completion and finishing	3,089	1.0	2,817	0.9	1,560	0.5	308	0.1	75	0
Other specialized construction activities	314	0.1	186	0.1	1,396	0.4	400	0.1	612	0.2
Total	319,632	100.0	310,266	100.0	316,448	100.0	340,683	100.0	304,273	100.00

Table 3.2 : Distribution of value of work done by type of construction activity - 2020/21

Type of Construction Activity	Value of work done (Rs. Mn)	%
Construction of buildings	121,185	39.8
Construction of roads and railways	151,508	49.8
Construction of utility projects	28,853	9.5
Construction of other civil engineering projects	1,966	0.7
Demolition and site preparation	0	0
Electrical, plumbing and other construction installation activities	74	0
Building completion and finishing	75	0
Other specialized construction activities	612	0.2
Total	304,273	100.00



Figure 3.1
Distribution of value of work done by type of construction activity - 2020/21



Source:
Department of Census and Statistics, Sri Lanka



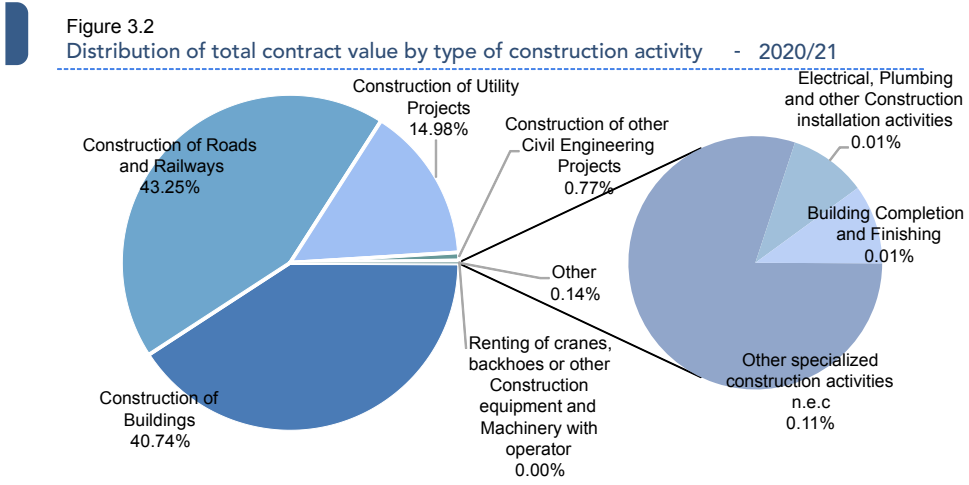
Table 3.3 : Important indicators of all construction activities in last 5 years

Indicator	All construction activities (Rs. Mn)				
	2016/17	2017/18	2018/19	2019/20	2020/21
Value of Contract	714,195	898,894	870,284	596,730	537,364
Value of Work Done	319,632	310,266	316,448	340,683	304,273
Intermediate Consumption	144,994	177,744	144,994	170,138	139,570
Value Added	231,257	174,229	193,603	176,652	166,327
Raw Materials	82,064	107,758	84,759	95,267	65,969
Wages & Salaries	28,692	21,265	34,875	29,432	20,633

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 lasts for more than one year.

Table 3.4 : Distribution of total contract value by type of construction activity - 2020/21

Type of Construction Activity	Value of Contract (Rs. Mn)	%
Construction of buildings	219,219	40.8
Construction of roads and railways	232,742	43.3
Construction of utility projects	80,499	15.0
Construction of other civil engineering projects	4,142	0.8
Demolition and site preparation	0	0
Electrical, plumbing and other construction installation activities	74	0
Building completion and finishing	75	0
Other specialized construction activities	612	0.1
Total	537,363	100



Source: Department of Census and Statistics, Sri Lanka



3.3 Contract Execution Efficiency

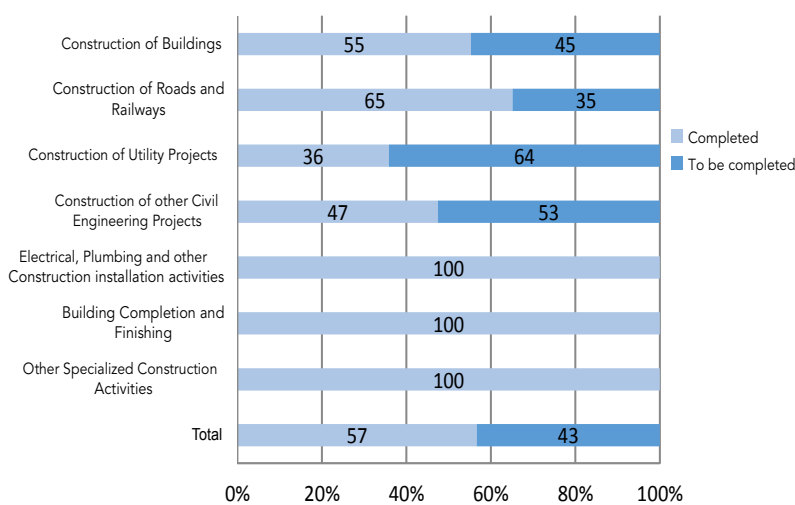
Table 3.5 and figure 3.3 reveals an average realization of 56.6% of contract value as completed work within the year. Roads and railways again performed relatively better with 65% execution, demonstrating either better project management or higher prioritization in funding and logistics. Conversely, utility projects exhibited low efficiency, with only 35.8% of contract

value realized. This might reflect technical complexities, dependency on imports, or bureaucratic delays. Notably, three sectors electrical/plumbing installations, building completion, and specialized construction achieved 100% realization, but they represent a very small portion of the total value, indicating these are typically short-term, low-value projects.

Table 3.5 : Share of value of work done for the total contract value by type of construction activity - 2020/21

Type of Construction Activity	Value of Contract (Rs. Mn)	Value of work done (Rs. Mn)	%
Construction of buildings	219,219	121,185	55.3
Construction of roads and railways	232,742	151,508	65.0
Construction of utility projects	80,499	28,853	35.8
Construction of other civil engineering projects	4,142	1,966	47.4
Demolition and site preparation	0	0	0.0
Electrical, plumbing and other construction installation activities	74	74	100.0
Building completion and finishing	75	75	100.0
Other specialized construction activities	612	612	100.0
Total	537,363	304,273	56.6

Figure 3.3
Share of value of work done for the total value of contract by type of construction activity-2020/21



Source:
Department of Census and Statistics, Sri Lanka



3.4 Input Utilization Trends

Table 3.6 shows that the total value of raw materials consumed in all construction activities during 2020/21 amounted to 65,968 million. The highest share was accounted for by other materials (34.2%), indicating the diverse range of inputs used in construction. Among specific materials, cement (17.7%) and iron and steel (17.4%) represented the largest cost components, followed by rubble and metal (15.8%). In contrast, materials such as glass (0.4%), aluminum (1.3%), and roofing materials (1.5%) contributed relatively

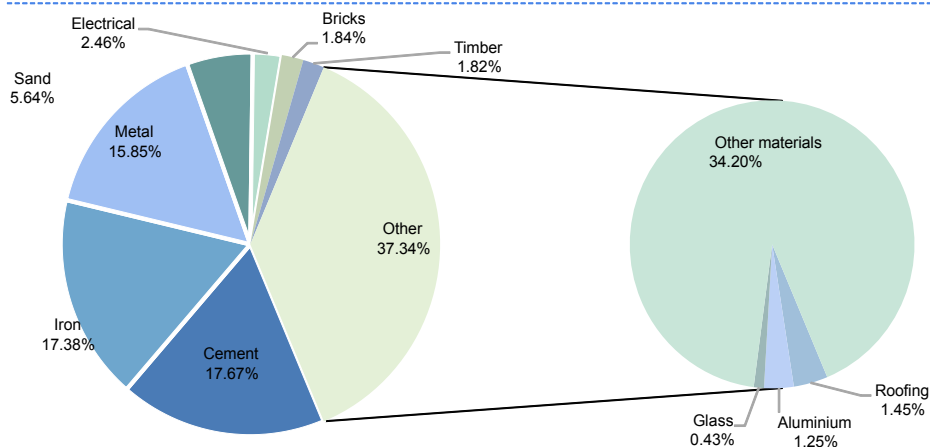
smaller shares to total consumption. Overall, the table highlights the dominance of core structural materials in construction expenditure. The composition of material usage points toward traditional inputs like cement (17.7%) and iron & steel (17.4%) as still dominant, with "Other materials" (34.2%) reflecting diverse input usage that may include imported items, specialty products, and machinery rentals.

The higher relative share of "Other materials" suggests a shift toward more specialized or non-traditional construction techniques in certain projects.

Table 3.6 : Value of raw materials consumed all construction activities - 2020/21

Type of raw material	Value (Rs. Mn)	%
Cement	11,656	17.7
Sand	3,721	5.6
Bricks	1,217	1.8
Rubble & Metal	10,453	15.8
Iron & Steel	11,468	17.4
Timber	1,201	1.8
Roofing materials	958	1.5
Aluminum	827	1.3
Glass	285	0.4
Electrical items	1,621	2.5
Other materials	22,561	34.2
Total	65,968	100.0

Figure 3.4
Value of raw materials consumed in all construction activities -2020/21



Source:
Department of Census and Statistics, Sri Lanka



3.5 Labour Market Impact

According to Table 3.7 salaries and wages for the survey year (2020/21) is Rs.20,085 million. representing 31.8% decline and decreased by 31.8% this year, falling from the Rs.29,432 million recorded in the previous year. This could result from fewer active

projects, workforce downsizing, or wage cuts, and has broader implications for livelihoods in the sector. It can also be seen that, the majority of employees fall into the "Other" category, hinting at the sector's reliance on semi-skilled or casual labour.

Table 3.7 : Average no. of employees & salaries classified by employee category - 2020/21

Employee Categories		Male	Female	Total	Wages & Salaries (Rs.)
Working Proprietors / Active Partners		1,856	248	2,105	**
Unpaid Family Workers		755	253	1,008	**
Operators		4,144	0	4,144	901,475,496
Other Employees	Administrative/ Managerial	3,239	319	3,558	2,421,459,990
	Technical/ Supervisory	6,809	660	7,469	3,954,533,391
	Clerical & related	2,682	922	3,604	2,458,760,142
	Other	22,847	855	23,702	10,349,028,523
Total		42,333	3,258	45,591	20,085,257,541

** not relevant

3.6 Project Size and Activity Classification

Table 3.8 shows that a large majority of activities fall in the Rs. 1 million – 10 million value band, suggesting the prevalence of small-to-medium scale projects. Only 49 activities exceeded

Rs. 500 million in value, underscoring that large-scale construction is limited and likely concentrated in urban areas or government-led infrastructure.

Table 3.8 : Number of construction activities by type of construction activity & value of work done size category - 2020/21

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	242	96	58	17	15		47	07	02
1,000,000 - 9,999,999	1,380	643	465	244	0		06	09	15
10,000,000 - 99,999,999	631	235	232	114	47		03	0	0
100,000,000 - 499,000,000	93	33	45	07	03		0	0	05
500,000,000 & above	49	16	21	11	0		0	0	0
Total	2,394	1,023	822	394	65		56	16	21

3.7 Enterprise and Workforce Structure

Tables 3.9 and 3.10 show that the sector is dominated by small-scale establishments over 63% have fewer than 10 employees and 76% are sole proprietorships. This

structure reflects the informality and fragmentation in the industry, potentially affecting resilience, compliance, and innovation capacity.

Table 3.9 : Number of establishments by legal status - 2020/21

Type of Legal status	No. of Establishments
Sole ownership	1,351
Partnership	235
Private Limited Liability Co.	174
Public Limited Liability Co.	08
Other	03
Total	1,771

Table 3.10 : Number of establishments by size class of persons engaged - 2020/21

Persons engaged size category	No. of establishments
Less than 10	1,119
10 - 19	417
20 - 49	179
50 - 99	32
100 & above	24
Total	1,771

4. STATISTICAL APPENDIX

Table 4.1 : Some selected indicators of construction activities classified by type of construction activity - 2020/21

	Type of Construction Activity	No. of Activities	Total Value of Contract (Rs.)	Value of work done (Rs.)
410 - Construction of buildings	41001 : Residential buildings	189	197,788,600,431	105,832,904,788
	41002 : Non residential buildings	629	18,698,520,295	13,143,445,180
	41003 : Both residential & non residential buildings	17	20,521,708	13,604,754
	41004 : Remodeling or renovating existing residential structures	188	2,711,168,308	2,195,090,221
	Group total	1,023	219,218,810,742	121,185,044,943
421 - Construction of roads & railways	42101 : Construction of roads	727	231,153,721,308	150,875,296,686
	42103 : Construction of bridges,tunnels	93	1,578,677,824	623,281,568
	42109 : Other construction related to roads & railways	2	9,840,000	9,840,000
	Group total	822	232,742,239,132	151,508,418,255
422 - Construction of utility projects	42201:Construction of pipelines,power lines & communication lines	123	78,366,693,470	26,918,623,268
	42202:Construction of irrigation systems(canals) & reservoirs	121	1,528,321,900	1,345,886,800
	42203:Construction of sewer systems,including repair	98	194,908,875	194,908,875
	42204:Construction of pumping stations	43	212,674,810	212,674,810
	42205:Construction of power plants	3	12,573,430	12,573,430
	42206:Construction of communication towers	3	184,475,152	167,921,766
	Group total	393	80,499,647,636	28,852,588,949
429 - Construction of other engineering projects	42902 : Construction of waterways, harbor & river works, pleasure ports (marinas), locks, etc.	18	124,959,925	55,653,901
	42903 : Dredging of waterways	43	1,403,215,238	1,403,215,238
	42904 : Construction work of outdoor sports facilities	0		
	42905 : Land subdivision with land improvement(e.g. adding of roads,utility infrastructure etc.)	3	2,613,848,650	506,807,585
	Group total	64	4,142,023,813	1,965,676,724

Table 4.1 : Some selected Indicators of construction activities classified by type of construction activity - 2020/21

Type of Construction Activity		No. of Activities	Total Value of Contract (Rs.)	Value of work done (Rs.)
432 - Electrical, plumbing and other construction installation activities	43211 : Installation of electrical wiring & fittings	50	31,666,838	31,666,838
	43221 : Installation of plumbing and sanitary equipment	3	37,208,116	37,208,116
	43224 : Installation of fire extinguishers	3	4,811,760	4,811,760
Group total		56	73,686,714	73,686,714
433 - Building completion & finishing	43309 : Other building completion work n.e.c (installations of glass mirrors, furniture, cleaning of buildings after construction etc.)	16	75,524,692	75,524,692
	Group total	16	75,524,692	75,524,692
439 - Other specialized construction activities	43908 : Renting of cranes,backhoes or other construction equipment and machinery with operator	16	15,375,000	15,375,000
	43909 : Other specialized construction activities n.e.c.	5	596,585,232	596,585,232
	Group total	21	611,960,232	611,960,232
Total		2,395	537,363,892,962	304,272,900,509

ANNUAL SURVEY OF Construction 2020-2021


Department of Census and Statistics |
Ministry of Finance, Planning and Economic
Development, Sri Lanka

THE VISION OF DCS





“To be the leader in the region in producing timely statistical information to achieve the country’s development goals.”

THE MISSION OF DCS

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