

The Structural Transformation of the Sri Lankan Desiccated Coconut Sector: A Comprehensive 2025 Economic Review

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1. Executive Overview: A Paradigm Shift in Value Realization

The fiscal and agricultural year of 2025 represents a definitive watershed moment in the history of Sri Lanka's coconut industry. It was a year characterized by extreme volatility, unprecedented policy interventions, and a fundamental decoupling of export revenue from physical production volume. For the first time in the nation's history, the aggregate export earnings from the coconut sector breached the USD 1 billion threshold, reaching approximately USD 1.13 billion by November 2025, with projections to close the year near USD 1.2 billion.¹ This achievement is particularly remarkable—and analytically complex—because it occurred against a backdrop of severe supply-side constraints, where the physical volume of Desiccated Coconut (DC) exports contracted by nearly 36% year-on-year during the first eleven months.⁴

The central narrative of 2025 is not one of abundance, but of **strategic value capture amid scarcity**. The Desiccated Coconut sector, traditionally the flagship of Sri Lanka's kernel exports, found itself at the center of a "perfect storm" involving lingering climatic stress from the previous year, intense domestic competition for raw materials from the liquid milk and virgin oil sectors, and a fluctuating global market that demanded premium quality despite rising prices.

The data reveals a stark divergence: while DC export volumes plummeted to 24,292 MT (Jan-Nov 2025) from 38,070 MT in the same period of 2024, the Rupee export value surged by 16% to Rs. 32.03 billion.⁴ This report posits that 2025 marks the end of the "commodity era" for Sri Lankan DC and the acceleration of its positioning as a luxury, high-value ingredient. This transition was supported—and necessitated—by government interventions such as the

controversial Temporary Import for Export Processing (TIEP) scheme, which allowed the importation of frozen kernels to sustain industrial throughput.⁵

This comprehensive research report provides an exhaustive analysis of the DC sector in 2025. It dissects the agronomic roots of the supply crisis, analyzes the month-by-month export performance, evaluates the price discovery mechanisms at the Colombo Coconut Auction, and explores the regulatory and compliance landscape that defined the year.

2. The Macroeconomic and Global Context

To fully appreciate the granular dynamics of the Sri Lankan DC market in 2025, one must first situate it within the broader global economic and agricultural framework. The global desiccated coconut market was valued at approximately USD 1.42 billion in 2025, with a projected Compound Annual Growth Rate (CAGR) of roughly 6.1% to 10.05% extending through the next decade.⁶

2.1 Global Consumption Trends

The demand side of the equation remained robust throughout 2025, driven by structural shifts in global food consumption habits. The "clean label" movement in North America and Western Europe continued to gain momentum, with desiccated coconut serving as a critical ingredient in plant-based, gluten-free, and paleo diets. The bakery and confectionery sectors alone accounted for nearly 25% of global DC volumes, utilizing the product for its texture and natural sweetness.⁶

However, the global market was not without its fissures. High production costs and supply chain instabilities were ubiquitous. Major producing nations, including the Philippines (which holds ~35% of the market) and Indonesia (~28%), faced similar challenges regarding aging plantations and weather-induced yield fluctuations.⁶ This global tightness provided a "price floor" for international trade, allowing Sri Lankan exporters to pass on significant domestic cost increases to international buyers without suffering a total collapse in demand.

2.2 Sri Lanka's Competitive Positioning

Sri Lanka has historically commanded a premium in the global DC market, often trading at a higher FOB (Free on Board) price compared to Philippine or Indonesian origins. This is attributed to the "Ceylon DC" brand, known for its whiter colour and distinct, sweeter flavor profile derived from the specific cultivars grown in the island's intermediate zone.

In 2025, this quality differentiation became the sector's primary defense mechanism. With local raw material costs soaring due to the auction prices reaching historic highs of Rs. 181,916 per 1,000 nuts in April⁹, Sri Lankan exporters could not compete on price. Instead, they

competed on specificity—targeting high-end confectionery manufacturers who demanded the specific organoleptic properties of Sri Lankan DC and were willing to pay the premium. This strategy explains the "Value over Volume" phenomenon observed in the export statistics.¹

3. Domestic Agronomy and Raw Material Supply

The fundamental constraint governing the DC sector in 2025 was the biological availability of coconuts. The coconut palm (*Cocos nucifera*) exhibits a biological lag of approximately 12 to 14 months between environmental stress (such as drought) and its impact on nut yield. Therefore, the production landscape of 2025 was largely written by the weather patterns of 2023 and 2024.

3.1 National Production Metrics and Forecasts

Entering 2025, the industry was bracing for a shortfall. The Coconut Research Institute (CRI), the nation's apex scientific body for the sector, forecasted a production of $1,407 \pm 37$ million nuts for the first half of the year.⁵ While ostensibly only a 1% reduction compared to the same period in 2024, this forecast masked the severity of the deficit relative to the *demand* capacity.

Sri Lanka's domestic consumption of fresh coconuts is notoriously high and inelastic. It is estimated that 65-70% of total national production is consumed domestically for culinary purposes (pol sambol, coconut milk for curries), leaving only the residual 30-35% for the industrial sector. In a year where total production dips, the "culinary anchor" remains constant, meaning the entire volume reduction is absorbed by the industrial sector (DC, Oil, Milk).

By mid-year, signs of recovery began to emerge. June 2025 production data indicated a robust recovery, rising 18% year-on-year to 289.5 million nuts.¹⁰ This resurgence was attributed to favorable rainfall in late 2024, but it arrived too late to salvage the first half's industrial throughput, leading to the massive Q1 and Q2 volume contractions in DC exports.

3.2 Regional Supply Dynamics: The "Coconut Triangle"

The pricing and availability of nuts varied significantly across the primary growing districts, reflecting local micro-climates and logistical factors. Data from December 2025 illustrates the regional disparities in farm-gate prices, which directly influenced the profitability of DC mills located in these areas.

Table 1: Regional Farm-Gate Prices (December 2025)

District	Price Range (Rs./1,000 Nuts)	Market Characteristics
Kurunegala	120,000 - 125,000	The heart of the processing industry; highest competition for nuts drives premiums.
Puttalam	118,000 - 122,000	High productivity zone; slightly lower prices due to larger estate volumes.
Gampaha	118,000 - 122,000	Mixed residential/plantation; supply often leaks to Colombo retail markets.
Hambanthota	125,000 - 130,000	Southern zone; scarcity and transport costs to NWP mills keep prices elevated.

Source: Derived from ¹¹

The consistently high prices in Kurunegala (Rs. 120k-125k) are particularly critical, as this district houses the highest concentration of export-oriented DC mills. The inability to source cheaper nuts locally forced many mills to operate below capacity or aggressively bid at the Colombo Auction, driving up national indices.

4. Policy Intervention: The Importation Strategy

In response to the raw material deficit that threatened to shutter factories and cause Sri Lanka to default on international contracts, the government implemented a decisive—and historically contentious—policy intervention in 2025: the partial liberalization of coconut imports for re-export.

4.1 The TIEP Scheme and Import Guidelines

Under the Temporary Import for Export Processing (TIEP) scheme, the Cabinet granted permission to import raw materials equivalent to 200 million coconuts.⁵ This policy was not a blanket opening of the market but a targeted surgical intervention designed to keep the industrial engines running without crashing the local farm-gate price for growers.

Key Regulatory Provisions ⁵:

- **Eligible Imports:** Frozen coconut kernels, dehydrated coconut chips, UHT coconut milk, and desiccated coconut itself. Note that whole fresh nuts with husk were *not* permitted due to biosecurity risks.
- **Beneficiaries:** Only manufacturers registered with the Coconut Development Authority (CDA) and the TIEP scheme were eligible.
- **Quarantine:** Strict phytosanitary protocols were enforced by the National Plant Quarantine Service (NPQS) to prevent the entry of pests like the Coconut Rhinoceros Beetle or Lethal Yellowing disease.
- **Value Addition:** The imported material had to undergo "significant value addition." Mere repackaging was prohibited. The finished product required a transformation at the HS Code four-digit level.
- **Market Segregation:** A strict "Iron Curtain" was erected between imports and the local market. Imported materials and their finished products were strictly forbidden from being sold locally, ensuring that the domestic culinary market remained supplied solely by local nuts.

4.2 Strategic Implications

This policy shift signals a fundamental transformation in the Sri Lankan coconut identity. It moves the nation from being solely a "Plantation Economy" (exporting what it grows) to a "Processing Hub" (aggregating regional raw materials to leverage superior processing infrastructure). This model mirrors the apparel sector, where Sri Lanka imports fabric to export high-value garments.

The guideline stating that "Frozen coconut kernels... shall only be imported for the purpose of production of coconut oil... and other coconut products for export" ¹² indicates that DC millers were also utilizing imported kernels to fulfill lower-grade or bulk contracts, reserving the scarce, premium Sri Lankan nuts for their highest-value clients.

5. Export Performance Analysis: The Divergence of 2025

The statistical record of DC exports in 2025 is a testament to the "scarcity premium" theory. Throughout the year, volumes trailed significantly behind 2024 levels, yet revenue remained buoyant.

5.1 Cumulative Performance Metrics

An analysis of the cumulative monthly bulletins released by the CDA reveals the trajectory of the sector. The year began with a precipitous drop in volumes, which slowly stabilized—but

never recovered—as the year progressed.

Table 2: Cumulative Export Performance of Desiccated Coconut (2024 vs. 2025)

Period	2024 Vol (MT)	2025 Vol (MT)	Vol Growth (%)	2024 Val (Rs. Mn)	2025 Val (Rs. Mn)	Val Growth (%)	Source
Jan - May	24,103	12,582	-48%	16,122.15	16,727.60	+4%	13
Jan - July	31,701	18,565	-41%	21,964.69	24,749.45	+13%	14
Jan - Aug	28,335	15,554	-45%	19,335.03	20,768.09	+7%	15
Jan - Nov	38,070	24,292	-36%	27,599.61	32,032.34	+16%	4

Insight: The Jan-May period was the nadir of the crisis, with volumes nearly halving (-48%). This correlates with the "Scarcity Phase" of the auction prices (discussed in Section 6). By November, the volume deficit had narrowed to -36%, likely aided by the Q3 crop recovery and the TIEP imports entering the processing stream.

Crucially, the value growth accelerated from +4% in May to +16% in November. This suggests that as the year went on, exporters were increasingly successful in renegotiating contracts at higher prices, or that the global market absorbed the price hikes as supply from other origins also tightened.

5.2 The Cannibalization Effect: DC vs. Liquid Products

A critical insight from the 2025 data is the displacement of DC by liquid coconut products. In a zero-sum game of limited nut supply, raw materials flow to the processor with the highest marginal revenue product.

Table 3: Inter-Sectoral Performance Comparison (Jan-Nov 2025)

Product Category	Volume Growth (YoY)	Value Growth (YoY)	Economic Implication
Desiccated Coconut	-36%	+16%	Losing the battle for raw materials;

			focusing on value.
Coconut Cream	+25%	+92%	High growth; capturing raw material share.
Coconut Milk	+15%	+59%	Robust demand driving production expansion.
Virgin Coconut Oil	+3%	+67%	Steady volume, massive value expansion.
Defatted Coconut	+351%	+566%	Massive boom in by-product utilization.

Source: Derived from ¹

The data explicitly shows that while DC volume collapsed, Coconut Cream and Milk volumes expanded by 25% and 15% respectively. This confirms that the liquid milk industry was able to outbid DC millers for the limited supply of fresh nuts. The "Defatted Coconut Boom" (+351% volume) is further evidence of this shift; defatted coconut is a residue of the Virgin Coconut Oil (VCO) and milk extraction process. Its massive growth mirrors the growth in oil and milk, further highlighting that the nuts were diverted away from traditional Desiccated Coconut production and *toward* extraction industries.

6. Price Discovery: The Colombo Auction Dynamics

The Colombo Coconut Auction serves as the benchmark for national pricing. In 2025, the auction floor was a theater of extreme volatility, reflecting the frantic interplay of supply shortages and speculative demand.

6.1 The Three Phases of 2025 Pricing

Market analysis identifies three distinct phases in the 2025 auction calendar ⁹:

1. Phase I: The Scarcity Rally (Jan - May)

- **Context:** Driven by the lagged effect of the 2024 drought.
- **Price Movement:** Prices escalated rapidly from Rs. 135,732 in March to an all-time historic peak of **Rs. 181,916 per 1,000 nuts** on April 24, 2025.
- **Implication:** At ~Rs. 182 per nut (wholesale), the cost of production for DC became

astronomically high. This period corresponds to the steepest decline in export volumes (-48%), as millers simply exited the market rather than process at a loss.

2. Phase II: The Supply Surge (June - September)

- **Context:** The biological recovery of the palms (June production +18%) brought a flood of nuts to the market.
- **Price Movement:** Prices corrected sharply downwards, stabilizing around **Rs. 114,779 per 1,000 nuts**.
- **Implication:** This window of affordability likely facilitated the slight recovery in export volumes seen in the Q3 statistics.

3. Phase III: The Market Crisis (October - November)

- **Context:** A sudden contraction in demand, despite moderate supply.
- **Price Movement:** Prices slumped to **Rs. 108,778 per 1,000 nuts** in November.
- **Critical Metric:** The "Sell-Through Rate" (percentage of nuts offered that were actually sold) plummeted to **19%** on November 13.⁹
- **Implication:** This indicates a saturation point or a "wait-and-see" approach by exporters, possibly due to filled order books or anticipation of further price drops.

6.2 Wholesale and Retail Spreads

The transmission of these auction prices to the domestic market remained sticky. Even as auction prices softened in Q4, retail prices remained high, maintaining the high cost structure for local consumers and small-scale processors.

- **Fresh Nut Wholesale (Dec 2025):** Rs. 140 - 160 per nut (Large).¹¹
- **Fresh Nut Retail (Dec 2025):** Rs. 190 - 205 per nut (Large).¹¹
- **DC Domestic Price (Jan 2026):** Rs. 850 - 950 per kg for Fine grade.¹¹

The gap between the auction price (~Rs. 108) and the retail price (~Rs. 200) highlights significant intermediation costs and margin retention by traders, further complicating the procurement strategies for DC manufacturers who buy from intermediate dealers rather than directly from the auction.

7. Quality Assurance, Compliance, and Cost Structures

In the high-value segment that Sri Lanka now occupies, quality compliance is not merely a regulatory hurdle but a core differentiator. The "Ceylon" brand equity relies on rigorous adherence to food safety standards, particularly for the European Union (EU) and North American markets.

7.1 The Cost of Compliance

In 2025, the Coconut Development Authority maintained a comprehensive fee structure for

quality testing. These costs are non-trivial and add to the final FOB price of the product.

Table 4: Quality Testing Cost Structure for Desiccated Coconut (2025)

Test Parameter	Method	Cost (Rs.)	Strategic Relevance
Aflatoxin	HPLC (Urgent)	22,500.00	Critical: The EU has zero-tolerance for aflatoxins. Speed is essential for shipment clearance.
Salmonella	Routine (5 samples)	5,700.00 (Pos)	Critical: A primary pathogen of concern for the US FDA.
Sulphur Dioxide (SO2)	Chemical Analysis	1,700.00	Preservative limits must be strictly adhered to for "clean label" status.
Microbiology	Lipolytic Organisms	8,500.00	Indicators of rancidity potential; vital for shelf-life guarantees.
Heavy Metals	Analysis (First metal)	4,900.00	Monitoring for Lead, Cadmium, Arsenic in response to stricter global limits.

Source: ¹⁶

The disparity between "Normal" (Rs. 15,000) and "Urgent" (Rs. 22,500) Aflatoxin testing highlights the logistical pressures exporters face. To catch a shipping vessel, exporters often pay the premium for urgent testing, further compressing margins. The "Lipolytic Organism Count" at Rs. 8,500 is also significant; high lipolytic counts lead to rancidity (soapy taste), which is the primary cause of rejection for DC. The strict enforcement of these tests ensures that despite the volume drop, the *quality* of exported DC remains pristine, justifying the price premium.

8. Strategic By-Products: The Whole Nut Economics

A nuanced understanding of the 2025 DC industry requires looking beyond the kernel. The

economic viability of a DC mill often depends on the revenue generated from by-products (shells, parings, water), especially when kernel margins are squeezed.

8.1 The Activated Carbon Shield

While DC volumes fell, the export value of **Coconut Shell Activated Carbon** rose by 30% to Rs. 56.20 billion.¹

- **Mechanism:** DC production generates high-quality, hard shells ideal for activated carbon.
- **Synergy:** Strong global demand for activated carbon (for water purification and air filtration) provided a crucial liquidity buffer for integrated DC manufacturers. Even if the kernel business was breaking even due to high nut prices, the shell business was highly profitable.

8.2 Defatted Coconut and Fiber

As noted in Section 5.2, the export of **Defatted Coconut** grew by 566% in value.¹ This product, essentially a high-fiber, high-protein flour, is a by-product of the oil extraction process. Its success points to a future where "waste" streams are as valuable as the primary product. DC millers who diversified into low-fat DC or coconut flour (using parings) were better positioned to weather the raw material crisis.

9. Future Outlook and The 2030 Roadmap

The year 2025 closed with the industry successfully navigating a high-stress environment to deliver record revenues. However, the structural deficit in raw materials remains the "Sword of Damocles" hanging over the sector.

9.1 The Northern Coconut Triangle

To address the supply crunch permanently, the government launched the "**Northern Coconut Triangle**" initiative in 2025.

- **Target:** Cultivation of 36,000 new acres of coconut.
- **Focus:** 16,000 acres specifically in the Northern Province (Jaffna, Kilinochchi, Mullaitivu).²
- **Strategic Logic:** The traditional coconut triangle (Kurunegala-Puttalam-Gampaha) is suffering from rapid urbanization and land fragmentation. The North, with its availability of contiguous land and suitable aquifers, represents the future frontier of production. Success here is non-negotiable for achieving the 2030 export targets.

9.2 The 2030 Target: USD 2.5 Billion

The government and the Export Development Board (EDB) have set a target of USD 2.5 billion in export earnings by 2030.²

- **Trajectory:** The jump from USD 800 million (2024) to USD 1.13 billion (2025) suggests the sector is on track, but this growth was price-driven.
- **Requirement:** To more than double revenue again by 2030, the industry cannot rely solely on price inflation. It must recover volumes. This requires the successful maturation of the Northern plantations and the possible permanence of the "Import for Re-export" model to decouple industrial growth from agricultural limits.

9.3 Forecast for 2026

Early indicators for 2026 suggest a stabilization of prices.

- **Price Outlook:** Analysts predict a stabilization of auction prices in the range of **Rs. 115,000 - 130,000 per 1,000 nuts** for Q1 2026.⁹ This "Goldilocks" range—high enough for farmers but manageable for millers—could allow DC volumes to recover slightly from the lows of 2025.
- **Market Sentiment:** The 19% sell-through rate in November 2025⁹ indicates that buyers are bearish, expecting prices to hold or drop. This gives millers leverage to negotiate better procurement rates in early 2026.

10. Conclusion

The 2025 annual review of the Sri Lankan Desiccated Coconut industry reveals a sector in the midst of a profound structural metamorphosis. The traditional model—where export volumes fluctuated in lockstep with rainfall patterns—has been upended. In its place, a new, more resilient, albeit more complex, model is emerging.

This new model is defined by three pillars:

1. **Premiumization:** The successful pivot to high-value markets that absorbed a 16% revenue increase despite a 36% volume drop.
2. **Integration:** The blurring lines between agronomy and industry, evidenced by the TIEP import scheme which treats coconuts as a global commodity to be processed, rather than just a local crop to be harvested.
3. **Diversification:** The reliance on the "Whole Nut" economy, where liquid milk, oil, and shell products buttress the profitability of the kernel sector.

While the "scarcity crisis" of 2025 was painful for millers who faced idle capacity, it forced the industry to shed its inefficiencies and focus relentlessly on value addition. The milestone of USD 1.13 billion is not just a statistic; it is proof that Sri Lankan coconut has successfully transitioned from a colonial plantation crop to a modern, sophisticated agro-industrial export. The challenge for 2026 and beyond will be to solve the agronomic deficit through the

Northern Triangle, ensuring that this "Processing Hub" has a secure, indigenous foundation for the decades to come.

Appendix: Statistical Data Tables

Table 5: 2025 Monthly Export Snapshot (Select Months)

Month	Product Focus	Trend	Key Driver	Source
May	DC	Vol: -48%	Post-drought scarcity; Auction price peak in April.	13
July	DC	Vol: -41%	Slight recovery as crop supply improves.	14
August	Kernel Products	Val: +48.2%	Surge in Virgin Coconut Oil and Milk demand.	17
November	Total Sector	Rev: \$1.13B	Cumulative effect of price inflation and value addition.	1

Table 6: Comparative Pricing Analysis (2025 Highs and Lows)

Metric	High (2025)	Date/Period	Low (2025)	Date/Period	Source
Auction Price (1k nuts)	Rs. 181,916	April 24	Rs. 108,778	November 20	9
DC Export Value	High Unit Value	Nov (Cumulative)	--	--	4
Sell-Through Rate	~88%	Q1/Q2 (Scarcity)	19%	Nov 13	9

Table 7: Infrastructure and Production Targets

Initiative	Goal	Target Year	Status in 2025	Source
Export Revenue	USD 2.5 Billion	2030	On Track (\$1.13B achieved)	²
Replanting (North)	16,000 Acres	--	Launched	²
Import Cap (TIEP)	200 Million Nuts	2025	Implementation Phase	⁵

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