

Development Guideline for the Spices Industry in the North Western Province, Sri Lanka

1. Introduction

The spice industry in Sri Lanka has a long and storied history, earning the island its reputation as the 'Spice Island.' This sector is a vital component of the country's agricultural economy, contributing significantly to foreign exchange earnings and providing livelihoods for numerous smallholder farmers. The North Western Province (NWP), with its diverse climatic zones and extensive agricultural lands, presents a significant opportunity for the expansion and development of the spice industry. This guideline aims to provide a comprehensive framework for developing the spice sector in the NWP, focusing on key spices, best practices for cultivation, value chain enhancement, and the supportive policy environment. By leveraging the province's unique strengths, particularly its extensive coconut plantations suitable for intercropping, the NWP can become a major hub for high-quality spice production and export.

2. Overview of the North Western Province (NWP)

2.1 Geography and Climate

The North Western Province (NWP) of Sri Lanka, also known as Wayamba, is characterized by a tropical monsoonal climate, experiencing distinct wet and dry seasons throughout the year [10]. The province's agricultural economy is highly developed, supporting a variety of crops including fruits, vegetables, flowering plants, oil-seeds, and spices [5]. The two main districts within the NWP are Kurunegala and Puttalam.

2.2 Current Agricultural Landscape and Spice Cultivation

Agriculture is a significant contributor to Sri Lanka's national GDP, and the NWP plays a crucial role in this sector [9]. While major agricultural products in the province include coconut and rice, spices are also cultivated [1]. The region is known for growing various spices, with ginger production concentrated in areas like Kurunegala [13]. The Department of Export Agriculture (DEA) is actively involved in promoting and supporting the cultivation of export agricultural crops (EACs), which include many spices [2]. Efforts are being made to expand spice production into regions like Kurunegala and Puttalam to meet export targets, particularly for Ceylon cinnamon [8]. The province's agricultural strategic plans aim to strengthen smallholder farming and agricultural development [12].

3. Key Spices and Their Potential in NWP

Sri Lanka, historically known as the 'Spice Island,' cultivates a diverse range of spices, many of which have significant potential for development in the North Western Province [6]. The

principal spices grown in Sri Lanka include cinnamon, pepper, cloves, nutmeg, cardamom, vanilla, ginger, and turmeric [15].

Cinnamon: Ceylon Cinnamon is a world-renowned spice, and efforts are underway to expand its production into areas like Kurunegala and Puttalam within the NWP [8]. This indicates a strong potential for increased cultivation and export.

Pepper: High-piperine pepper is another key export spice from Sri Lanka [6]. Pepper is a profitable intercrop for coconut lands, especially in the wet zone, and can be cultivated by farmers with good drainage facilities [7, 9]. Given the extensive coconut cultivation in the NWP, pepper presents a significant opportunity for intercropping.

Cloves, Nutmeg, and Cardamom: These spices are traditionally grown in the central hills of Sri Lanka [15]. However, with suitable climate and soil conditions, and appropriate agricultural practices, there is potential to explore their cultivation in suitable microclimates within the NWP.

Ginger and Turmeric: Ginger is already concentrated in districts like Kurunegala [13]. Both ginger and turmeric are suitable intercrops for coconut lands, offering additional income to farmers [11, 14]. The cultivation of these spices can be further enhanced through improved farming techniques and market linkages.

4. Best Practices for Spice Cultivation

4.1 Intercropping with Coconut

Intercropping spices with coconut is a highly recommended practice in Sri Lanka, particularly in regions with extensive coconut plantations like the North Western Province. This method maximizes land utilization and provides additional income for farmers [1, 2].

Suitable Spices for Intercropping:

- **Pepper:** Pepper is a perennial and profitable intercrop for coconut lands, especially in the wet zone. It can be cultivated by farmers with good drainage facilities, with vines trained to climb on coconut trees [7, 9, 10].
- **Cinnamon:** Cinnamon has been identified as a promising and economically feasible intercrop in coconut plantations, particularly when planted using high-density methods [11].
- **Ginger and Turmeric:** Both ginger and turmeric are well-suited for intercropping in coconut lands. They are shade-tolerant and can significantly raise farm income [3, 4, 5, 6].
- **Nutmeg and Cardamom:** These spices can also be considered for intercropping, depending on the specific microclimatic conditions and soil suitability within the coconut estates [3].

Guidelines for Successful Intercropping:

- **Spacing:** Ensure adequate spacing between coconut trees and intercrops to prevent competition for nutrients, sunlight, and water. For tea intercropping, a minimum of 2.4 meters (8 ft) should be left for the coconut's manure circle [12]. Similar considerations apply to spices.
- **Drainage:** Proper drainage is crucial, especially for pepper cultivation, as poor drainage can lead to root diseases [9].
- **Soil Management:** Implement practices that maintain soil fertility and health, such as organic matter application and appropriate fertilization for both coconut and the intercrops.
- **Shade Management:** Utilize the shade provided by coconut palms to the advantage of shade-loving spices like turmeric and ginger, while ensuring sufficient light for optimal growth.
- **Variety Selection:** Choose spice varieties that are well-adapted to the local climate and soil conditions of the NWP and are suitable for intercropping systems.

4.2 Sustainable Farming Methods

Sustainable farming practices are crucial for the long-term viability and environmental health of the spice industry in the North Western Province. These methods focus on minimizing environmental impact, preserving biodiversity, and ensuring the economic well-being of farmers [16].

Key Sustainable Practices:

- **Organic Farming:** Sri Lanka has favorable conditions for organic spice cultivation, with many smallholders already using minimal chemical fertilizers and pesticides [17]. Organic farming practices, such as those seen in "spice gardens" that mimic forest ecosystems, help protect soil health and biodiversity [18, 19]. This approach can also attract health-conscious consumers and increase export potential [20].
- **Integrated Pest Management (IPM):** IPM strategies for spice crops involve a combination of biological controls, cultural methods, and careful monitoring to manage pests effectively while reducing reliance on chemical pesticides [21, 22]. While IPM has been promoted in other agricultural sectors in Sri Lanka, its application in spice cultivation needs further emphasis [23].
- **Soil and Water Conservation:** Practices that conserve soil and water, such as proper drainage systems, mulching, and efficient irrigation techniques, are vital for sustainable spice farming. This is particularly important for crops like pepper, which are sensitive to poor drainage [9, 16].
- **Biodiversity Promotion:** Encouraging biodiversity within spice farms, for example, by intercropping with various plants, helps create a resilient ecosystem and reduces the risk of pest outbreaks [18].
- **Good Agricultural Practices (GAPs):** Adhering to GAPs ensures the production of high-quality, safe spices, which is essential for market access and consumer trust. These practices encompass all stages of cultivation, from planting to harvesting and post-harvest handling.

5. Value Chain Analysis and Market Opportunities

The spice industry in Sri Lanka is a crucial component of the global export market, with key spices including true cinnamon, black pepper, cardamom, clove, and nutmeg [24]. The value chain for these spices typically involves several stages, from cultivation and harvesting to processing, packaging, and export. However, the traditional value chain often faces challenges such as decentralized low-quality product purchases, sales, and numerous intermediaries [25].

5.1 Value Chain Analysis

Value chain analyses for cinnamon, pepper, and cardamom in Sri Lanka have identified both opportunities and constraints, particularly concerning quality and safety standards [26, 27]. Small-scale farmers, who cultivate about 70% of the spices, often face challenges such as high production costs, limited access to international markets, and high margins taken by intermediaries [28, 29]. The export of sub-standard products can also damage Sri Lanka's reputation in the international market [30].

5.2 Market Opportunities

Despite the challenges, the global demand for spices is rising, with projections indicating significant growth in the coming years [31]. Sri Lanka is well-positioned to capitalize on this demand due to its reputation for high-quality spices, especially Ceylon Cinnamon. Key market opportunities include:

- **Growing Global Demand:** The global spice market is expected to reach substantial figures by 2031, driven by increasing consumer interest in diverse cuisines and natural ingredients [31].
- **Organic and Sustainable Products:** There is a growing niche market for organic and sustainably produced spices. Sri Lanka's existing practices, where many smallholders use minimal chemicals, provide a strong foundation for expanding into this high-value segment [17, 20].
- **Value-Added Products:** Moving beyond raw spice exports to value-added products such as essential oils, oleoresins, and ready-to-use spice blends can significantly increase export earnings. The majority of Sri Lankan spice and allied products are already consumed by the global food and beverage, and pharmaceutical industries [32].
- **Diversification of Export Markets:** While Sri Lanka exports to many destinations, strengthening and diversifying export markets can enhance resilience and reach new consumer bases [33].
- **Geographical Indications:** Leveraging geographical indications for unique Sri Lankan spices like Ceylon Cinnamon can command premium prices and protect their authenticity in international markets.

5.3 Challenges in the Value Chain

- **Quality and Safety Standards:** Ensuring consistent quality and adherence to international food safety standards remains a challenge, particularly for small-scale producers [26].
- **High Production Costs:** High labor costs and other production expenses can impact the competitiveness of Sri Lankan spices [30].
- **Limited Access to Finance and Technology:** Small-scale farmers often lack access to adequate financing for adopting modern farming techniques and technologies that could improve productivity and quality.
- **Market Linkages:** Weak linkages between farmers, processors, and exporters can lead to inefficiencies and reduced profitability for producers [25].
- **Climate Change Impacts:** Variations in climate can affect yields and quality, posing a long-term threat to spice production [9].

6. Policy Framework and Support Systems

The development of the spice industry in the North Western Province is significantly influenced by national and provincial policy frameworks, as well as various support systems aimed at enhancing agricultural productivity and export capabilities.

6.1 National Export Strategy (NES) for Spices

Sri Lanka's National Export Strategy (NES) for the spice sector, developed through consultations with private and public-sector stakeholders, aims to propel the industry to greater heights and establish Sri Lanka as a key export destination [34, 35]. The NES focuses on strengthening existing and building new links along the spice value chain, improving quality and safety standards, and diversifying export markets [26, 36]. The National Export Development Plan (NEDP) 2026–2030 further emphasizes export-led growth and economic diversification, with the spices and concentrates sector offering strong value addition potential, supported by GI certification for Ceylon Cinnamon [37].

6.2 Department of Export Agriculture (DEA) Initiatives

The Department of Export Agriculture (DEA) plays a crucial role in supporting the spice industry through various programs and initiatives. These include:

- **Assistance for New Planting/Re-planting of EACs:** The DEA provides investment assistance to farmers willing to cultivate or re-cultivate spices such as Cinnamon, Pepper, Coffee, Cocoa, Cardamom, Clove, Nutmeg, Vanilla, Lemongrass, and Citronella [38].
- **Productivity Improvement Programs:** The DEA offers assistance for improving productivity in low-productive EAC lands, targeting spices like Cinnamon, Pepper, Coffee, Cocoa, Cardamom, Clove, and Nutmeg [39].

- **Post-Harvest Facilities and Equipment:** The DEA provides assistance for the development of post-harvest facilities and equipment, crucial for maintaining the quality of export agricultural crops [40].
- **Technical Guidance:** The DEA provides technical leaflets and training to farmers on best practices for spice cultivation, pest and disease management, and post-harvest handling [41].

6.3 Provincial Agricultural Policies and Support

The North Western Provincial Council's Department of Agriculture is responsible for implementing agricultural development plans at the provincial level. While specific detailed policies for spices in the NWP require further investigation, the broader provincial agricultural strategic plans aim to strengthen smallholder farming and agricultural development [12]. The Export Development Board (EDB) also conducts awareness programs for entrepreneurs in the North Western Province to develop exporters [42].

6.4 Research and Development

Institutions like the Council for Agricultural Research Policy (CARP) and various universities contribute to research and development in the agricultural sector, including spices. This research is vital for developing new varieties, improving cultivation techniques, and addressing challenges faced by the industry [43].

6.5 Financial Support

Access to finance is a critical component of agricultural development. Government schemes and financial institutions provide credit facilities and subsidies to farmers for adopting modern farming techniques, purchasing inputs, and investing in post-harvest infrastructure.

7. Challenges and Recommendations

The development of the spice industry in the North Western Province faces several challenges that need to be addressed to unlock its full potential. Based on the value chain analysis and current agricultural landscape, the key challenges and corresponding recommendations are outlined below:

7.1 Challenges

- **Low Productivity and Yields:** Many small-scale farmers operate on scattered plots of land, leading to lower yields compared to optimized cultivation practices [29].
- **High Production Costs:** Increasing labor costs and other input expenses reduce the profitability for farmers [30].
- **Limited Access to Finance and Technology:** Smallholders often lack the necessary capital to invest in modern farming techniques, quality planting materials, and efficient post-harvest technologies [28].

- **Weak Market Linkages and Intermediaries:** The presence of numerous intermediaries in the traditional value chain can lead to lower prices for farmers and reduced overall efficiency [25].
- **Inconsistent Quality and Standards:** Ensuring consistent quality and adherence to international food safety standards is a significant hurdle, especially for small-scale producers aiming for export markets [26]. The export of sub-standard products can damage the reputation of Sri Lankan spices [30].
- **Climate Change Vulnerability:** Variations in temperature and rainfall patterns can negatively impact crop yields and quality, posing a long-term threat to spice production [9].
- **Limited Value Addition:** A significant portion of spices is exported as raw materials, limiting the potential for higher earnings through value-added products.
- **Lack of Awareness and Training:** Farmers may lack adequate knowledge of best practices in cultivation, sustainable farming, and market requirements.

7.2 Recommendations

To overcome these challenges and foster a thriving spice industry in the North Western Province, the following recommendations are proposed:

- **Promote Modern and Sustainable Cultivation Practices:**
 - **Intercropping:** Actively promote intercropping of suitable spices (pepper, cinnamon, ginger, turmeric, nutmeg, cardamom) with coconut, providing technical guidance and financial incentives for adoption [7, 11, 14].
 - **Sustainable Farming:** Encourage the adoption of organic farming methods, Integrated Pest Management (IPM), and Good Agricultural Practices (GAPs) through training and certification programs [17, 22].
 - **Improved Planting Material:** Facilitate access to high-quality, disease-free planting materials to enhance productivity and yield.
- **Strengthen Farmer Support Systems:**
 - **Access to Finance:** Develop accessible credit schemes and subsidies for small-scale farmers to invest in modern equipment, irrigation systems, and post-harvest facilities [38, 39].
 - **Extension Services:** Enhance the reach and effectiveness of agricultural extension services to provide timely technical advice, training, and information on market trends.
 - **Farmer Cooperatives:** Encourage the formation and strengthening of farmer cooperatives to improve collective bargaining power, access to resources, and market linkages.
- **Enhance Value Chain Efficiency and Market Access:**
 - **Direct Market Linkages:** Facilitate direct connections between farmers/cooperatives and exporters/processors to reduce the role of intermediaries and ensure fair prices.
 - **Value Addition:** Promote investment in processing technologies for value-added products such as essential oils, oleoresins, powders, and spice blends. Provide training on processing techniques and quality control.

- **Branding and Certification:** Support initiatives for branding Sri Lankan spices, particularly Ceylon Cinnamon, and assist farmers in obtaining international certifications (e.g., organic, fair trade) to access premium markets [37].
- **Market Intelligence:** Provide farmers with up-to-date market information, including demand trends, price fluctuations, and quality requirements in international markets.
- **Policy and Regulatory Support:**
 - **Provincial Spice Development Plan:** Develop a specific provincial development plan for the spice industry in the NWP, aligning with national export strategies and addressing local needs.
 - **Quality Control:** Implement stringent quality control measures at all stages of the value chain to ensure that exported spices meet international standards.
 - **Research and Development:** Invest in research to develop climate-resilient spice varieties and innovative farming techniques suitable for the NWP.
- **Climate Change Adaptation:**
 - **Climate-Smart Agriculture:** Promote climate-smart agricultural practices that enhance resilience to climate variability, such as water-efficient irrigation and drought-resistant varieties.
 - **Early Warning Systems:** Establish and disseminate early warning systems for weather patterns and potential pest outbreaks to help farmers mitigate risks.

8. Conclusion

The North Western Province of Sri Lanka holds significant potential for the development of its spice industry. By strategically addressing current challenges through the implementation of modern and sustainable cultivation practices, strengthening farmer support systems, enhancing value chain efficiency, and providing robust policy and regulatory support, the province can significantly boost its spice production and export capabilities. Focusing on intercropping with coconut, promoting organic farming and IPM, improving access to finance and technology, and fostering direct market linkages will be crucial for realizing this potential. These concerted efforts will not only contribute to the economic prosperity of the region but also enhance Sri Lanka's position as a leading global spice producer.

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