

Indian Fish Market Report by Fish Type (Inland Fishes, Marine Fishes, Shrimps, Scampi), Product Type (Fresh, Frozen, Canned, and Others), Distribution Channel (Retail, Institutional), Sector (Organised, Unorganised), and State 2024-2032

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Abstracts

The Indian fish market size reached 20.7 Million Tons in 2023. Looking forward, IMARC Group expects the market to reach 41.4 Million Tons by 2032, exhibiting a growth rate (CAGR) of 7.8% during 2024-2032. The rising consumer awareness about the nutritional benefits of aquatic cuisine, continual advancements in aquaculture technology, active government initiatives promoting sustainable practices in fisheries, and shifting consumer preferences toward protein-rich diets represent some of the key factors driving the market.

Fish are cold-blooded vertebrates that reside primarily in aquatic environments, both freshwater and marine. Characterized by gills for respiration, scales covering the body, and fins for locomotion, fish are a biologically diverse group, with thousands of species. Additionally, fish are rich sources of essential nutrients such as Omega-3 fatty acids, proteins, and various vitamins and minerals. In capture fisheries, fish are harvested from natural habitats using techniques ranging from nets to lines and traps. On the other hand, aquaculture represents controlled breeding, rearing, and harvesting of fish in designated areas like fish farms. Here, variables like water quality, temperature, and feed can be manipulated to optimize growth and health. The capture and breeding mechanisms aim to satisfy various market demands, from direct human consumption to uses in pharmaceuticals and pet supplies.

The Indian market is primarily driven by the rising consumer awareness about the nutritional benefits of aquatic cuisine. In line with this, continual advancements in

aquaculture technology are elevating production capacities, thereby providing an impetus to the market. Moreover, active government initiatives promoting sustainable practices in fisheries are acting as significant growth-inducing factors. In addition to this, the expansion of cold-chain logistics networks is making it possible to distribute products more widely, thus reducing wastage and resulting in higher investment in premium offerings. Besides this, the increasing demand for varied aquatic species, fueled by the nation's culinary diversity, is creating lucrative opportunities. Also, health-conscious consumer behavior is positively impacting the market by shifting preferences toward protein-rich diets. Some of the other factors contributing to the market include the rise in disposable income levels, improved post-harvest management practices that enhance shelf life, the initiation of quality certification programs that elevate consumer trust, and government-backed educational programs that underscore the importance of responsible fishing practices.

Indian Fish Market Trends/Drivers:

Rising export opportunities

Another factor significantly impacting the Indian market is the rising opportunity for exports. With a coastline spanning over thousands of kilometers and abundant inland water resources, India has the potential to be a significant exporter of aquatic products. The country has already started leveraging this advantage by establishing stringent quality standards and complying with international regulations, making its aquatic products attractive to foreign markets. Government incentives for export-oriented production and tie-ups with countries with high seafood consumption are acting as catalysts in this regard. The increasing focus on exports not only diversifies the market but also injects substantial foreign capital, thereby providing a strong impetus for growth. This has a multiplier effect on other sectors, such as shipping and logistics, making it a cornerstone for the overall market growth.

An enhanced focus on adaptation to climate change

One of the most critical factors driving the Indian aquatic market is the industry's adaptability to climate change. As global temperatures rise and aquatic ecosystems become increasingly vulnerable, the Indian market is showing resilience by adopting innovative, climate-resilient farming methods. These methods not only protect against environmental hazards but also ensure a steady supply of diverse aquatic species. From developing heat-tolerant species to creating buffer zones against flooding, these adaptive techniques are making it possible for the industry to not just survive but also thrive. Investment in research and technology for climate-resilient aquaculture is

opening new avenues for sustainable growth, attracting both domestic and international stakeholders. This factor plays an indelible role in safeguarding the future of the industry and offers a competitive edge in the global arena, further driving market expansion.

Indian Fish Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market report, along with forecasts at the country from 2024-2032. Our report has categorized the market based on fish type, product type, distribution channel, and sector.

Breakup by Fish Type:

Inland Fishes

Indian Major Carps

Pangasius

Exotic Carps

Clarias

Anabas

Rupchanda

Tilapia

Seabass

Others

Marine Fishes

Shrimps

Scampi

Inland fishes account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the fish type. This includes inland fishes (Indian major carps, pangasius, exotic carps, clarias, anabas, rupchanda, tilapia, seabass, and others), marine fishes, shrimps, and scampi. According to the report, inland fishes represented the largest segment.

The inland fishes segment dominates the market primarily due to the vast network of rivers and freshwater bodies across India which provides a natural habitat conducive for inland fishing. Also, government initiatives aimed at boosting aquaculture have led to improved fish farming techniques and better yield in inland waters. Moreover, inland fish varieties like carps are a staple in the local diet, driving domestic demand, and the lower operational costs associated with inland fishing make it more economically viable for local fishermen. Furthermore, the lack of a need for advanced technology and

equipment in inland fishing makes it more accessible. Apart from this, shorter supply chains for inland fishes ensure fresher produce, which is a significant factor for consumer preference.

Breakup by Product Type:

Fresh

Frozen

Canned

Others

Fresh represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the product type. This includes fresh, frozen, canned, and others. According to the report, fresh represented the largest segment.

The fresh segment of the market is primarily driven by consumer preference for freshly caught produce, local culinary traditions, and the perceived nutritional value. This segment also benefits from short supply chains and community markets, ensuring quick turnarounds from catch to consumer. Regulatory measures that focus on maintaining quality also support this segment. Seasonal availability of specific types of fish acts as a variable factor influencing consumer choice and price. Additionally, the rise in awareness regarding the health benefits of fresh fish contributes to market growth. Infrastructure developments in cold storage and transportation have started to make an impact but are not yet fully optimized. E-commerce platforms specializing in fresh produce are emerging as new sales channels.

Breakup by Distribution Channel:

Retail

Institutional

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes retail and institutional.

The retail segment is influenced by consumer convenience, variety, and the ability to buy in controlled quantities. Supermarkets and hypermarkets offer a wide range of products, including processed and packaged fish, appealing to urban consumers. Branding and advertising play a significant role in driving sales in this segment. Loyalty

programs and frequent discounts are tactical elements that engage consumers.

On the other hand, in the institutional segment, bulk purchasing by hotels, restaurants, and caterers is the major driving factor. Consistency in quality and the ability to meet large-scale demand on short notice are crucial for success. Long-term contracts and partnerships are commonly observed in this segment. Health and safety certifications often serve as differentiators in supplier selection. Pricing agreements and volume discounts act as critical negotiation points. Seasonal availability affects menu planning and procurement strategies. Special events and holidays also drive the demand intermittently.

Breakup by Sector:

Organised

Unorganised

A detailed breakup and analysis of the market based on the sector has also been provided in the report. This includes organised and unorganised.

The organised sector benefits from regulatory compliance, which offers consumers a guarantee of quality and safety. Investments in technology for harvesting, storage, and transportation are more prevalent in this segment. Sustainable fishing practices, often mandated by law or consumer demand, contribute to market appeal. Standardized operations offer predictability and efficiency, helping to build strong relationships with both suppliers and consumers. Certification and labeling practices, such as eco-labels or quality assurance marks, bolster consumer trust.

On the contrary, the unorganised sector is primarily driven by traditional fishing methods and local markets. Lack of regulatory oversight can both hamper and benefit this segment; while it offers flexibility, it also poses quality and safety concerns. Price competitiveness is a significant factor, as are community trust and long-standing relationships. This sector is more vulnerable to seasonal fluctuations and environmental factors.

Breakup by State:

West Bengal

Andhra Pradesh

Karnataka

Kerala
Gujarat
Tamil Nadu
Maharashtra
Others

West Bengal leads the market, accounting for the largest market share

The report has also provided a comprehensive analysis of all the major regional markets, which include West Bengal, Andhra Pradesh, Karnataka, Kerala, Gujarat, Tamil Nadu, Maharashtra, and others. According to the report, West Bengal was the largest market for Indian fish in the country.

For the West Bengal region, the fish market is deeply ingrained in the local culture and cuisine, making it a high-consumption area for fish. Proximity to both freshwater and saltwater fishing grounds adds to the variety and availability. State-led initiatives for fisheries development, including infrastructure and loans for fish farmers, stimulate the market. However, challenges such as overfishing and environmental degradation also exist, affecting long-term sustainability. Trade routes and export channels to neighboring countries and states contribute to market dynamics.

Additionally, the Bengali diaspora's demand for specific types of fish also impacts imports. Traditional markets coexist with modern retail formats, adding layers to consumer choice. Seasonal and religious festivals significantly drive up consumption and thereby influence supply chain planning.

Furthermore, government interventions in quality control and hygiene standards are increasingly shaping the market. Consumer awareness about sustainable fishing and environmental impact is gradually rising. The intertwining of fish with local traditions and festivals like Durga Puja and Pohela Boishakh creates unique market fluctuations. Overall, the West Bengal region presents a complex interplay of cultural, economic, and environmental factors shaping its fish market.

Competitive Landscape:

Leading entities in the market are actively employing various strategies to assure market expansion. To start, they are continually advancing aquaculture technology, thereby increasing production capacities and meeting the rising demand for aquatic products. Concurrently, they are engaging with government initiatives that promote sustainable fishing practices, positioning themselves as responsible industry players.

Another focus area for these companies is the expansion of cold-chain logistics networks, allowing for wider product distribution and minimized wastage. Given the nation's diverse culinary tastes, these companies are also diversifying their product range to include a variety of aquatic species. A pivotal strategy being employed is the initiation of quality certification programs, which enhances consumer trust and elevates brand image. Additionally, they are tapping into the health-conscious consumer segment by promoting the nutritional benefits of aquatic cuisine, thus driving demand. These companies are also improving post-harvest management practices to extend product shelf life.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Abad Fisheries Private Limited
Golden Prize India
Kirti Foods
Munnujii Foods International Pvt. Ltd.
Oceans Secret
Seasaga Group
Silver Sea Food

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Key Questions Answered in This Report

1. How big is the Indian fish market?
2. What is the expected growth rate of the Indian fish market during 2024-2032?
3. What are the key factors driving the Indian fish market?
4. What has been the impact of COVID-19 on the Indian fish market?
5. What is the breakup of the Indian fish market based on the fish type?
6. What is the breakup of the Indian fish market based on the product type?
7. What is the breakup of the Indian fish market based on the sector?
8. What is the breakup of the Indian fish market based on the distribution channel?
9. What are the key regions in the Indian fish market?

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