



**Mr. Alex K Nainan:** Managing Partner of Baby Marine International, one of the top Seafood Exporters in India. The Baby Marine International is into varied activities like seafood processing & exports, aquaculture, plantations, hospitals, restaurants etc. He is also the President of Seafood Exporters Association of India, Kerala Region. He is the Board member of MPEDA and member of Research Council, KUFOS.

# Kerala's Fisheries Sector

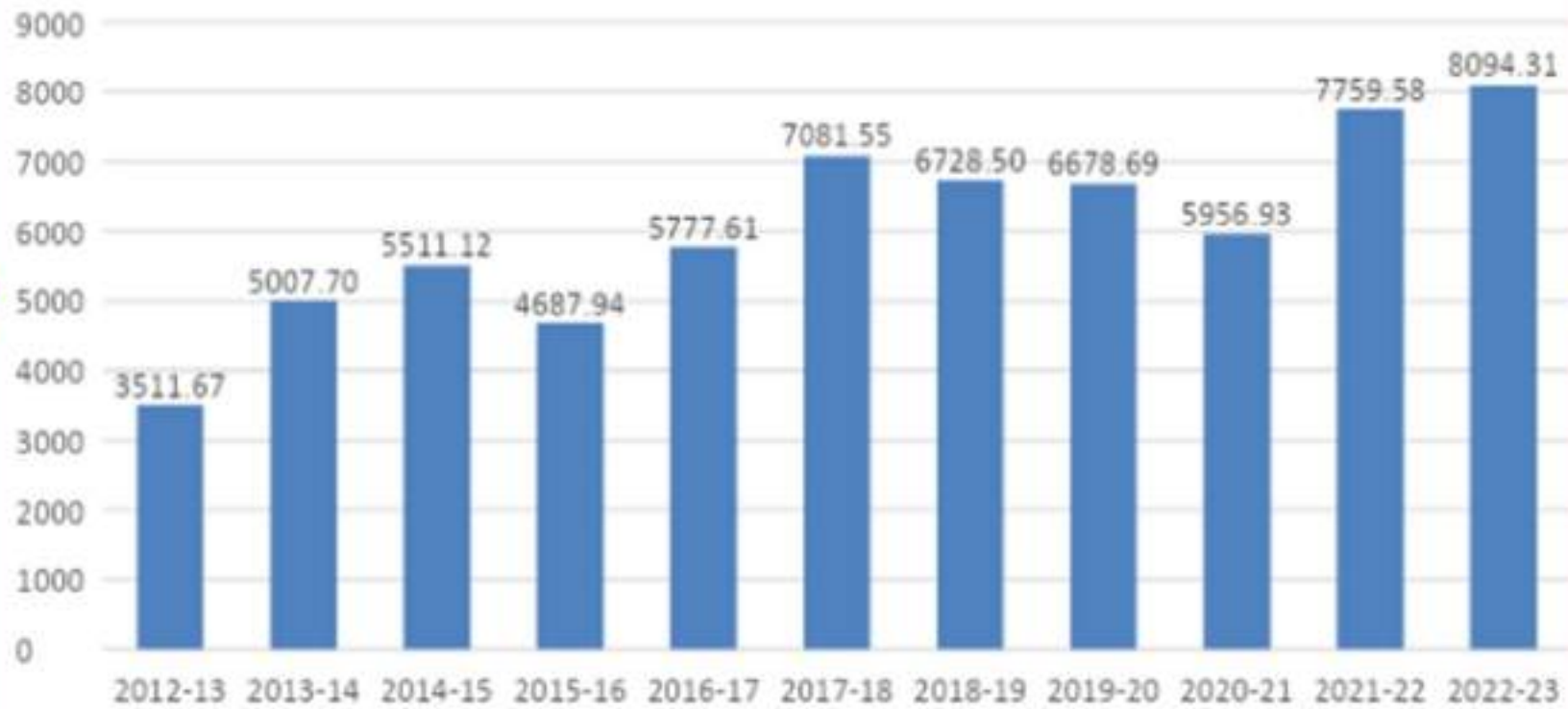
*Presented by: ALEX K. NINAN*

*President: The Seafood Exporters Association of India- Kerala Region*

*Partner: Baby Marine Group*

## India's Export of Marine Products

Value in USD Million

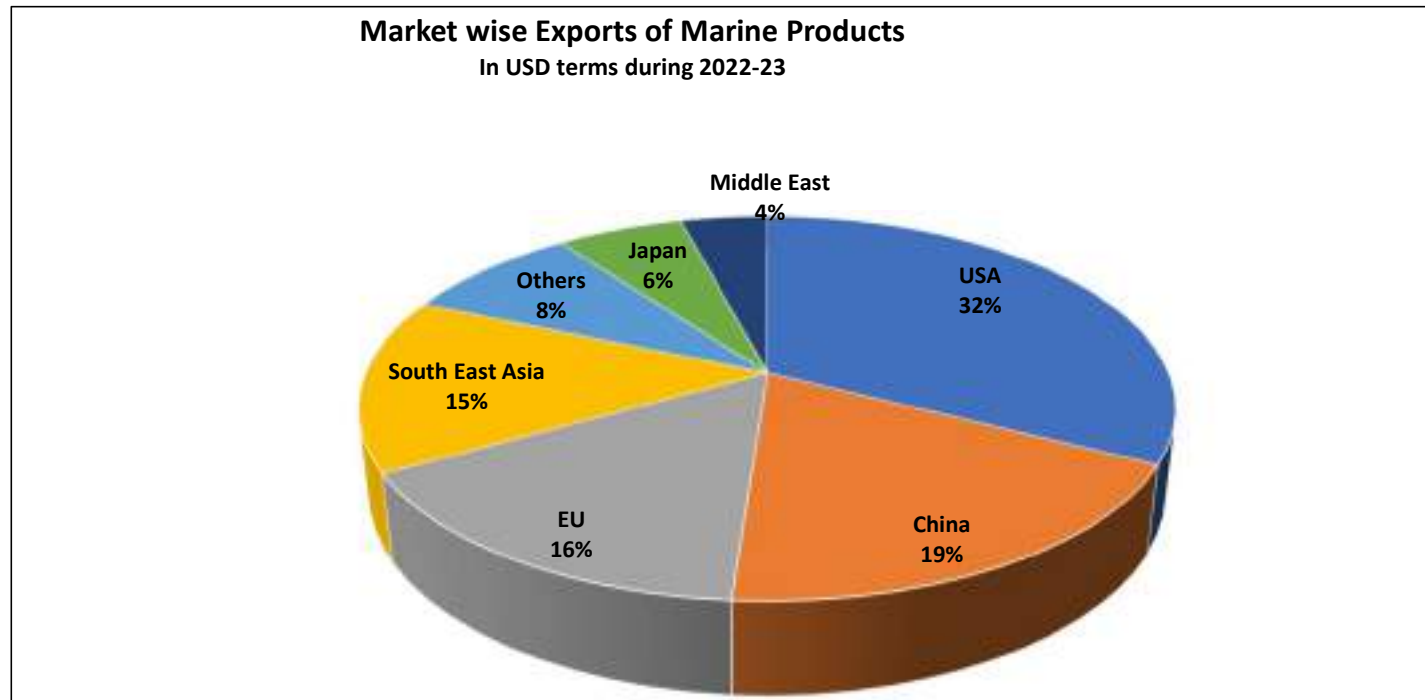


## MARKET WISE EXPORT OF MARINE PRODUCTS (2018-19 TO 2022-23)

Q: Quantity in M T, V: Value in Rs. Crore, \$: US Dollar Million

Market		2018-19	2019-20	2020-21	2021-22	2022-23
<b>JAPAN</b>	Q:	84080	78507	86814	90308	109199
	V:	2919.75	2920.28	3033.36	3242.94	3846.90
	\$:	423.27	422.24	412.11	440.77	484.79
<b>USA</b>	Q:	281913	305178	291948	372611	306334
	V:	16220.00	17904.37	17990.40	24603.34	20600.35
	\$:	2344.43	2562.54	2451.04	3371.66	2632.08
<b>EUROPEAN UNION</b>	Q:	165571	165773	152770	198484	207976
	V:	6256.20	6136.71	6022.83	8570.05	10018.38
	\$:	900.50	876.47	821.83	1162.17	1263.71
<b>CHINA</b>	Q:	225519	329479	218343	266989	405547
	V:	5672.76	9617.44	6908.63	9056.70	11956.91
	\$:	811.14	1374.63	939.17	1175.05	1508.43
<b>SOUTHEAST ASIA</b>	Q:	446966	223398	217710	243401	431774
	V:	10561.31	4929.90	4876.05	5747.98	9494.02
	\$:	1531.53	705.99	665.60	779.28	1191.25
<b>MIDDLE EAST</b>	Q:	60232	57387	48606	58426	77677
	V:	1979.34	2079.12	1843.39	2235.53	2623.05
	\$:	286.30	297.23	251.13	303.12	330.68
<b>OTHERS</b>	Q:	128278	129929	133319	139045	196780
	V:	2980.02	3075.03	3046.32	4129.95	5429.53
	\$:	431.33	439.60	416.05	527.53	683.38
<b>TOTAL</b>	Q:	1392559	1289651	1149510	1369264	1735286
	V:	46589.37	46662.85	43720.98	57586.48	63969.14
	\$:	6728.50	6678.69	5956.93	7759.58	8094.31

## Market wise Exports of Marine Products In USD terms during 2022-23

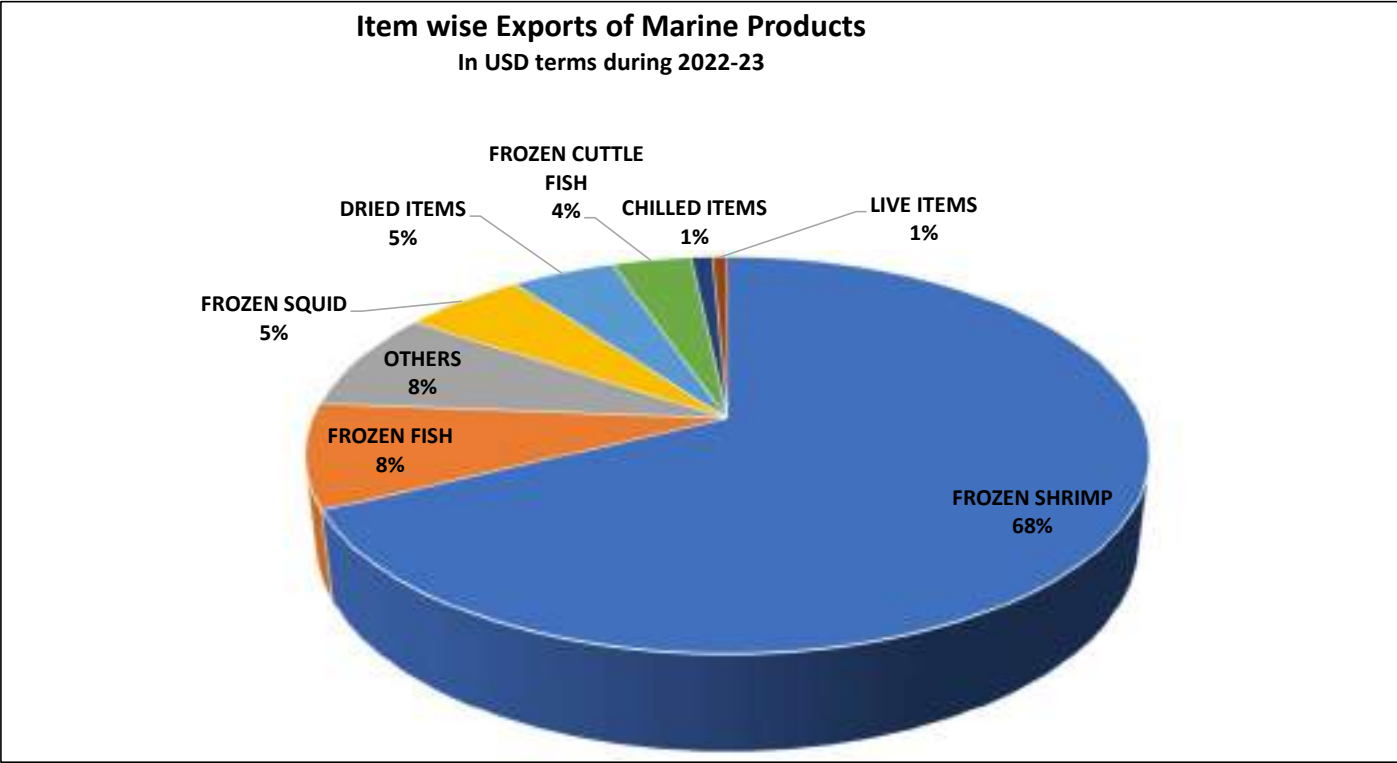


## ITEM WISE EXPORT OF MARINE PRODUCTS (2018-19 TO 2022-23)

Q: Quantity in M T, V: Value in Rs. Crore, \$: US Dollar Million

Item		2018-19	2019-20	2020-21	2021-22	2022-23
<b>FROZEN SHRIMP</b>	Q:	614145	652253	590275	728123	711099
	V:	31800.51	34152.03	32520.29	42706.04	43135.58
	\$:	4610.59	4889.12	4426.19	5828.59	5481.63
<b>FROZEN FISH</b>	Q:	338933	223318	188130	226586	368549
	V:	4916.82	3610.01	2941.65	3471.91	5503.18
	\$:	699.09	513.60	402.31	471.45	687.05
<b>FR CUTTLE FISH</b>	Q:	60210	70906	59292	58992	54919
	V:	1975.97	2009.79	1626.34	2062.63	2353.34
	\$:	282.29	286.40	221.97	280.08	295.49
<b>FR SQUID</b>	Q:	101101	87631	61176	75750	83846
	V:	2506.99	2196.59	1998.90	2806.09	3593.75
	\$:	359.71	314.23	273.37	383.37	454.61
<b>DRIED ITEM</b>	Q:	95296	84417	85661	73679	252918
	V:	1323.45	981.50	1148.38	1472.98	3080.92
	\$:	189.58	140.81	156.94	143.46	384.05
<b>LIVE ITEMS</b>	Q:	10179	7287	4379	7032	7824
	V:	388.88	324.26	239.69	353.36	440.06
	\$:	55.89	46.43	32.72	47.98	55.47
<b>CHILLED ITEMS</b>	Q:	17207	21202	17622	21689	24428
	V:	616.22	631.84	477.99	733.47	616.29
	\$:	89.20	90.34	65.14	63.92	77.17
<b>OTHERS</b>	Q:	155487	142638	142975	177414	231703
	V:	3060.53	2756.84	2767.74	3979.99	5246.03
	\$:	442.16	397.77	378.30	540.73	658.84
<b>TOTAL</b>	Q:	1392559	1289651	1149510	1369264	1735286
	V:	46589.37	46662.85	43720.98	57586.48	63969.14
	\$:	6728.50	6678.69	5956.93	7759.58	8094.31

# Item wise Exports of Marine Products In USD terms during 2022-23



# Aquaculture and Seafood export in Kerala



## Kerala's Marine Profile

Exclusive Economic Zone	218,536 km <sup>2</sup>
Continental Shelf	39,139 km <sup>2</sup>
Coastal Length	590 km
Catchable Resource Potential	7.5 lakh tons

# Inland Profile of Kerala

Water bodies	Nos.	Area (ha)
River	44	85000
Fresh water lakes	9	1620
Backwaters	51	46129
Reservoirs outside wildlife sanctuaries	35	17780
Reservoirs within wildlife sanctuaries	12	17210
Kole lands		17,000
Kuttanad padasekharams		35,000

## Brackish water Potential in Kerala

- ❑ Total Brackish water area = 65,213 Ha
- ❑ Area developed = 5,443 Ha
- ❑ Area under culture = 3,323 Ha

## District wise details of Traditional Prawn Filtration Fields (Pokkali) in Kerala

Sl.No.	Name of District	Area of traditional prawn filtration fields (Ha)
1.	Kasargod	0.06
2.	Kannur	2680.75
3.	Kozhikode	23.25
4.	Malappuram	13.00
5.	Thrissur	1005.80
6.	Ernakulam	5188.85
7.	Alappuzha	1871.45
	<b>Total</b>	<b>10783.16</b>

## Major item wise export details in Kerala 2022-2023

Item	Quantity (Tons)	Value (Rs Crore)	Value (US\$ Million)	Unit Value (US\$ Million per Ton)
FROZEN SHRIMP	70,800	3,945.43	505.28	7.14
FROZEN FISH	51,524	884.39	110.72	2.15
FR CUTTLE FISH	22,130	1,068.26	134.63	6.08
FR SQUID	31,517	1,455.91	184.72	5.86
DRIED ITEM	6,767	81.39	10.19	1.51
LIVE ITEMS	54	8.75	1.12	20.77
CHILLED ITEMS	1,183	46.60	5.86	4.95
OTHERS	34,655	794.31	100.21	2.89
<b>Grand Total</b>	<b>218,629</b>	<b>8,285.03</b>	<b>1,052.72</b>	<b>4.82</b>

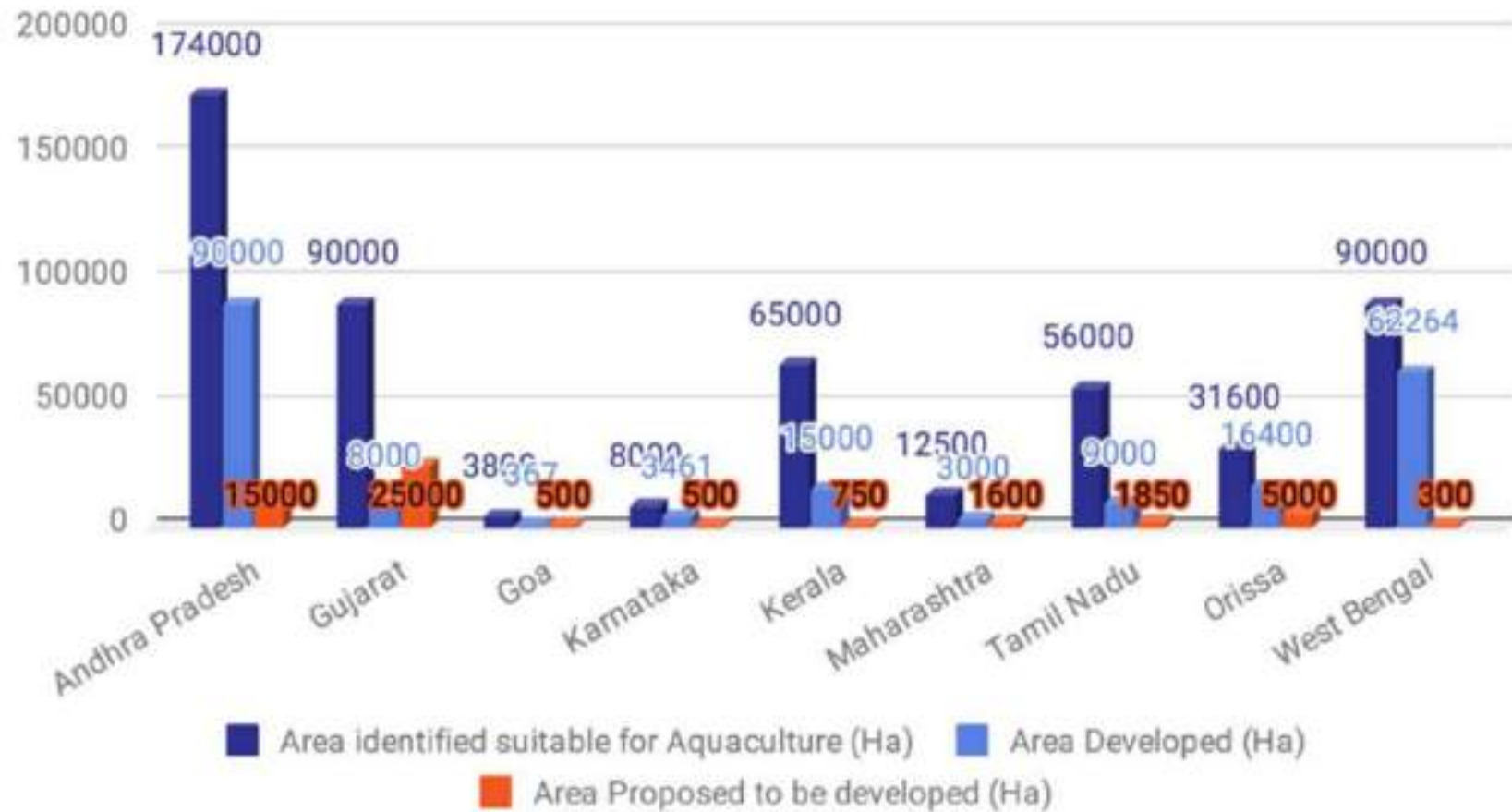
## Market wise export details of Kerala -2022-2023

Country	Quantity (Tons)	Value (Rs Crore)	Value (US\$ Million)	Unit Value (US\$ Million per Ton)
JAPAN	8,549	456.19	57.23	6.69
USA	16,640	1,112.33	148.24	8.91
EUROPEAN UNION	51,304	2,527.08	318.28	6.20
CHINA	52,452	1,941.73	245.36	4.68
SOUTH EAST ASIA	56,892	1,269.15	159.04	2.80
MIDDLE EAST	8,939	360.15	45.54	5.09
Other	23,853	618.38	79.03	3.31
<b>Grand Total</b>	<b>218,629</b>	<b>8,285.03</b>	<b>1,052.72</b>	<b>4.82</b>

## KERALA : TOTAL SHRIMP PRODUCTION

SI No	District	Area under culture (Ha) 2022-23	SHRIMP PRODUCTION (MT)		
			2020-21	2021-22	2022-23
1	Alappuzha	638.65	253.63	290.555	439.48
2	Kollam	82.0	111.975	100.175	218.42
3	Ernakulam	1831.97	648.85	799.84	918.75
4	Thrissur	398.17	440.32	268.99	407.82
5	Kannur	334.14	375.98	358.1	460.11
6	Kozhikode	31.9	34.68	2.5	20.54
7	Others	6.35	0	0	2.62
<b>Total</b>		<b>3323</b>	<b>1867</b>	<b>1820</b>	<b>2468</b>

## Potential area for Aquaculture





## Production trend in Kerala

	2019-20	2020-21	2021-22	2022 -23
Capture (Production in Lakh Tons)	5.44	6.34	5.5	6.87*
Cultured Shrimp (Production in Tons)	2623	1867	1820	2468

\*Kerala occupies 3<sup>rd</sup> position in the capture fisheries sector in India.

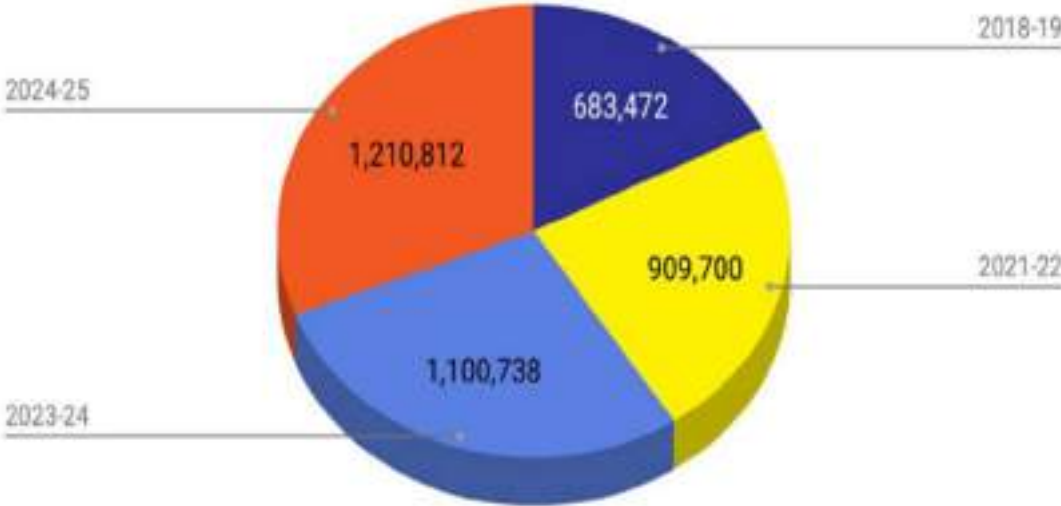
2022-23	India	Kerala
Aquaculture shrimp production	11.61 lakh MT	0.02468 Lakh MT
Marine fish production	34.90 lakh MT	6.87 lakh MT

## SEAFOOD EXPORT GROWTH IN KERALA

Year	2022-23	2021-22	%Growth
Quantity (Tons)	218629	182430	19.8
Value (Crore Rs.)	8285.03	6971.56	18.84
Value (Million USD)	1053	958.17	9.8

# Shrimp production - The way forward

Quantity (Tons) vs. Year



	PORT-WISE EXPORT OF MARINE PRODUCTS (2018-19 to 2022-23)					
	Q: Quantity in M T, V: Value in Rs. Crore, \$: US Dollar Million					
Ports		2018-19	2019-20	2020-21	2021-22*	2022-23*
<b>KOCHI</b>	Q:	180457	146038	143552	175332	225230
	V:	5861.55	4904.49	4994.75	6167.69	7550.48
	\$:	845.57	700.26	681.04	849.57	959.09
<b>COCHIN AIR CARGO ACC</b>	Q:	0	0	0	3216	2115
	V:	0.00	0.00	0.00	126.69	104.17
	\$:	0.00	0.00	0.00	17.54	13.26
<b>COCHIN SPECIAL ECONOMIC ZONE - SEZ CARGO</b>	Q:	0	0	0	0	3125
	V:	0.00	0.00	0.00	0.00	112.78
	\$:	0.00	0.00	0.00	0.00	14.17

## Processing infrastructure facilities available in Kerala

Details	Number/Capacity
Registered exporters	213
Manufacturer exporter (MT)	121
Merchant exporter (ME)	66
Route-through Merchant Exporter (RX)	16
Ornamental Fish Exporter (OF)	10
Seafood processing plants	118
Total installed capacity of plants (MT/day)	4926MT
Frozen Storages (MT)	99245.39MT

# **Kerala as a Seafood Processing hub of the World**

## **Present status of Exports**

**Presently majority of the seafood is exported to China, Thailand, Vietnam and Indonesia as their Raw material for re-processing, value-addition and re-export to Japan, USA, EU and other world markets.**

**This re-processing can be replaced by doing value-addition at the source itself and re-exported fetching a better value and providing labour and income to the people here.**

## **The following can be considered to make Kerala as a Seafood Processing hub:**

### **1. History**

The Frozen Seafood Processing of India started in Kerala in 1953

### **2. Governing and Research bodies are based at Kochi**

- MPEDA
- CMFRI
- CIFT
- CIFNET
- NIPHATT

They are the bodies which grant approval for the factories, reference laboratories and research institutes for seafood in India.

### **3. Maximum seafood processing plants of india are in Kerala**

4. Spare and excess capacity of processing plants – Presently only 25% used annually.

### **5. Availability of skilled and competitively priced labour**



***THANK***

***YOU***