
**INDIA'S FISHERIES INDUSTRY CROSSING THE SHORES: A CASE
STUDY**

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DOI: <https://doi-doi.org/101555/ijarp.4056>**CASE ABSTRACT:**

The Industrial domain in India has several avenues that caters to the economy. One such inherent strength of India is Fisheries sector that is contributing significantly towards the regional development. India is one of the largest fish-producing countries in the world, ranking third in total fish production & second in aquaculture production globally. Country's vast coastline, extensive inland water resources & favorable agro-climatic conditions has supported quite well in development of the sector. The fisheries industry in India holds critical economic, social, nutritional, & global trade significance, supporting livelihoods, enhancing food security, contributing to GDP, & strengthening overall economy. India's fisheries sector is broadly classified into marine fisheries & inland fisheries, with inland fisheries particularly, aquaculture accounting for a growing share of total production.

At the global level, India has steadily strengthened its presence in international seafood markets, supplying marine & aquaculture products to a wide range of countries. India's export-oriented growth, however, also exposes the sector to challenges related to quality standards, traceability, environmental sustainability & labour conditions. This case attempts to discuss the domain understanding on the Fisheries sector. The dilemma discussed in the case states the essential angel of consideration for the industry in terms of the Market, Climate consideration, health grounds etc. The Challenges discussed and the avenues proposed in the case essentially lead this literature to the level of creating domain understanding on the Fisheries Industry.

KEYWORDS: Fisheries Industry, Indian Fisheries Industry, Dilemma in Fisheries Industry, Aquaculture.

FISHERIES INDUSTRY IN INDIA: OVERVIEW

India is one of the largest fish-producing countries in the world, ranking third in total fish production & second in aquaculture production globally. It contributes significantly to food security, rural livelihoods, employment generation & export earnings. With its vast coastline, extensive inland water resources & favorable agro-climatic conditions, India has emerged as a leading fish-producing nations globally, with fisheries evolving from traditional subsistence activity into a commercially & export-oriented sector. India's fisheries sector is broadly classified into marine fisheries & inland fisheries, with inland fisheries particularly, aquaculture accounting for a growing share of total production. The sector supports millions of fishers, fish farmers, processors, traders & ancillary workers, making it one of the largest livelihood-based sectors in the country. Beyond employment, fisheries play a crucial role in nutritional security, as fish is a key source of affordable animal protein, especially for coastal & rural population.

Over the years, the sector has witnessed structural transformation, driven by technological advancements, increased private participation, and strong policy support from the Government of India. Initiatives under the Blue Economy framework and targeted schemes for fisheries development have aimed at enhancing productivity, modernising infrastructure, promoting value addition, & strengthening market linkages. Institutions such as National Fisheries Development Board and Marine Products Export Development Authority play a pivotal role in guiding sectoral growth, sustainability, and export competitiveness.

At the global level, India has steadily strengthened its presence in international seafood markets, supplying marine & aquaculture products to a wide range of countries. This global integration aligns with trends highlighted by the Food and Agriculture Organization, which recognises fisheries & aquaculture as key drivers of inclusive growth and sustainable livelihoods in developing economies. India's export-oriented growth, however, also exposes the sector to challenges related to quality standards, traceability, environmental sustainability, & labour conditions. Despite its growth, the fisheries industry faces persistent challenges such as resource over-exploitation, infrastructure gaps, post-harvest losses, climate variability, & income vulnerability among small-scale fishers. These issues underline the need for a balanced approach that integrates economic expansion with ecological sustainability & social equity.

Overall, the fisheries industry in India represents a dynamic and evolving sector, increasingly “crossing the shores” from local waters to global value chains. Its future trajectory depends on effective governance, sustainable resource management, technological adoption, & the ability to align domestic capabilities with international market requirements.

FISHERIES INDUSTRY: SIGNIFICANCE

The fisheries industry in India holds critical economic, social, nutritional, & global trade significance, supporting livelihoods, enhancing food security, contributing to GDP, & strengthening export performance.

1. Economic Contribution

The fisheries sector is a meaningful contributor to India’s economy, particularly within the agriculture & allied sectors. According to government data, the sector contributes around 1% to India’s Gross Domestic Product (GDP) & approximately 7.28% to the agricultural & allied activities output. This positioning underscores the sector’s importance as a complementary growth driver for rural & coastal economies.

2. Employment & Livelihoods

Fisheries & aquaculture are highly labour-intensive, generating employment across the value chain from capture & farming to processing & trade. The sector supports over 28 million people directly, with estimates indicating that women constitute about 70% of the workforce in fish processing & allied activities, highlighting the sector’s role in inclusive & gender-responsive employment.

3. Nutritional Security

Fish is a key source of high-quality protein, omega-3 fatty acids, vitamins, & minerals, which are essential for combating malnutrition. In India, fish consumption contributes to dietary diversification, particularly in rural & coastal communities where other animal proteins may be cost-prohibitive. While national fish consumption per capita varies across regions, many coastal states report per capita consumption rates that are 2–3 times higher than the national average of around 5 kg per person per year, indicating its significance to nutrition.

4. Export Earnings & Global Integration

India has become a major player in the global seafood export market, with exports diversified across marine & aquaculture products. According to the Marine Products Export

Development Authority, the country exported approximately 1.73 million metric tonnes of fish & seafood products in FY 2022–23, earning foreign exchange of more than US\$8 billion. This export revenue represents a significant increase over 25% growth compared to previous years, underlining the sector's rising role in international trade.

5. Inland Fisheries & Aquaculture Growth

Aquaculture has been the fastest-growing sub-segment within the fisheries industry. Over the past decade, India's aquaculture production has expanded at a compound annual growth rate (CAGR) of approximately 8–10%, making it one of the fastest-growing food production sectors in the country. This expansion has been supported by productivity improvements, technological adoption, & increased hatchery and seed availability.

6. Regional & Rural Development

The industry's role in regional & rural employment is profound. In states like West Bengal, Andhra Pradesh, Kerala, and Odisha, where fisheries & aquaculture are deeply embedded, fishing contributes significantly to rural household incomes, with some communities relying on fisheries income for up to 40–50% of household earnings. This integration of livelihoods has a multiplier effect across local economies.

7. Environmental & Sustainable Development Linkages

Fisheries are a key component of the Blue Economy framework, which emphasises sustainable use of ocean resources for economic growth, improved livelihoods, and ecosystem health. The sector's sustainable management requires balancing production with conservation of marine ecosystems, a priority highlighted in both national policy & global frameworks such as the Food & Agriculture Organization's guidelines on responsible fisheries.

CHALLENGES & OPPORTUNITIES: FISHERIES INDUSTRY

The Indian fisheries industry holds enormous potential but also faces significant constraints. Understanding these challenges and opportunities is crucial for framing strategies that can help the sector move from domestic growth to global competitiveness.

Challenges:

1. Resource Degradation & Environmental Stress

Unsustainable fishing practices and climate variability pose serious risks to marine and inland fish stocks. According to FAO, many major fishing regions globally show signs of overfishing & ecosystem stress, which can impact long-term productivity. The State of World Fisheries and Aquaculture 2024 notes that “overfishing remains a key threat to fish stocks and marine ecosystems worldwide.”

2. Infrastructure Deficits & Post-Harvest Losses

Lack of modern processing, cold chains, and logistics leads to high post-harvest losses in India. Government data suggests that post-harvest losses can range between 20–30% in some fisheries sub-sectors due to inadequate storage & transport facilities. Department of Fisheries reports indicate persisting infrastructure gaps affecting profitability & market access.

3. Access to Technology & Capital

Small-scale fishers & aquaculture farmers often lack access to modern gear, quality seed, & affordable finance, limiting productivity improvements. National-level summaries recognize this gap as a barrier to sectoral transformation. The National Fisheries Development Board identifies restricted access to technology and credit as limiting productivity enhancements.

4. Regulatory & Institutional Barriers

Multiple regulatory bodies with overlapping mandates create policy fragmentation & enforcement challenges, affecting scheme implementation and compliance. Reviews of India’s fisheries governance highlight coordination issues at central & state levels. Government of India (2022) notes implementation challenges across fisheries development programmes.

5. Market Volatility & Export Barriers

Export markets demand compliance with stringent sanitary and phytosanitary standards. Reports from export authorities indicate variable global demand & quality barriers can reduce market access. MPEDA’s export statistics highlight quality compliance as a key challenge for seafood exports.

Opportunities

1. Expansion of Aquaculture & Technological Innovation

Aquaculture continues to grow rapidly in India. Improvements in hatchery technology, feed, disease management, & data-driven monitoring can enhance yields and reduce risk. FAO (2024) notes that aquaculture offers the most rapid growth potential within the fisheries sector globally.

2. Strengthening Value Chains & Post-Harvest Infrastructure

Investments in processing, cold chains, and logistics can reduce losses & enhance quality, making products export-competitive. National schemes explicitly target this gap.

Government of India's policy documents outline infrastructure upgrades under sector development programmes.

3. Diversification of Export Markets

Rising global seafood demand offers opportunities to diversify India's export destinations beyond traditional markets. Strategic marketing of indigenous species can enhance foreign exchange earnings. India Brand Equity Foundation reports increased market diversification potential due to rising global seafood consumption.

4. Sustainable & Inclusive Business Models

International demand for sustainable seafood creates opportunities for eco-certification, value addition, and premium pricing. Community-based models can enhance equitable growth. FAO (2024) emphasizes sustainability and certification as competitive differentiators in global seafood trade.

5. Digital Platforms & Market Linkages

Digital tools improve price discovery, traceability, & direct market access for small producers, reducing intermediaries and improving income shares. NFDB (2023) discusses digital integration as an enabler for transparency and market access.

DILEMMA ASSOCIATED:

1. Overfishing: India's near-shore marine fish stocks face intensive exploitation, reducing the availability of commercially important species like sardines and mackerel.

Factors contributing to this include open-access fishing, poor regulation enforcement, and inadequate scientific stock assessment. This situation forces small fishers to increase fishing effort even as stocks decline, raising operational costs and reducing catch per trip.

2. Market power imbalance: In India, most fishers sell catch immediately at landing centres with no storage, no organised auction, and weak price visibility.

This results in fishermen receiving low immediate prices while higher market values are realised by intermediaries, weakening fisher incomes despite demand growth.

3. Post Harvest losses: Fish is highly perishable, and in India 15–25% is lost post-harvest due to inadequate cold storage and transport infrastructure. Regions with poor last-mile infrastructure often import fish from other states despite local production, illustrating operational gaps that erode value after the catch.

4. Disease risk in Aquaculture: Aquaculture, especially shrimp farming has high economic potential but is vulnerable to disease outbreaks. Weak biosecurity and delayed reporting exacerbate losses, making entire crop cycles unprofitable for farmers.

5. Climate Vulnerability: Climate change, including rising sea temperatures, extreme weather events, and habitat disruption, directly affects fish availability, fishing windows, and coastal communities. For example, prolonged fishing restrictions due to ecological conditions in parts of Odisha highlight how climate impacts directly cut off fishing income for months

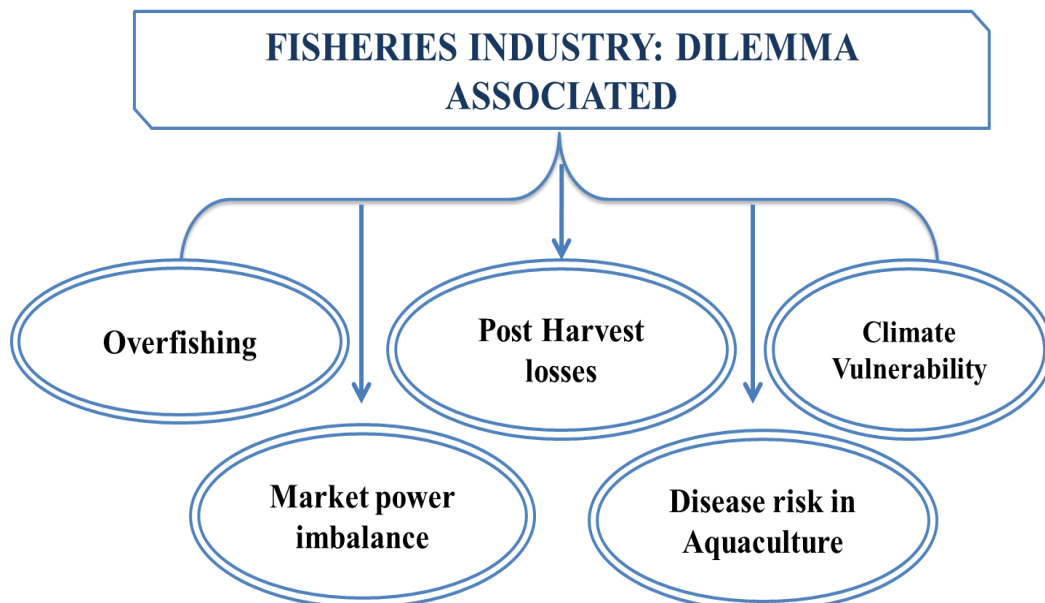


Chart No. 1: Fisheries Industry: Dilemma Associated.

Source: Authors' Understanding

CONCLUSION:

The Indian fisheries industry is rich in potential but grapples with systemic challenges ranging from biological risks & climate vulnerabilities to value chain inefficiencies & market imbalance. What stands out is that the problems are rooted in execution & incentive misalignment, not merely policy absence. A managerial approach focusing on incentive alignment, community accountability, infrastructure at the last mile, & risk mitigation thinking yields sustainable & implementable solutions. The dilemma discussed in the case states the essential angle of consideration for the industry in terms of the Market - Climate consideration - health grounds etc. The Challenges discussed and the avenues proposed in the case essentially lead this literature to level of creating domain understanding on the Fisheries Industry.

TEACHING NOTES:

OBJECTIVES FOR THE CASE INSTRUCTOR:

- To equip readers / participants with the domain understanding of Fisheries Industry in India & the strategic skills associated with such Businesses.
- To gain knowledge with respect to the dynamics of Fisheries Industry while highlighting the challenges & opportunities of the Industry.
- To discuss the success stories & pitfalls of Fisheries Industry in India.

LEVEL OF ANALYSIS:

The current case is a Teaching case with Appraisal Method. The case attracts the level of BBA, MBA Students, In general Commerce Graduates, Executive MBA candidates and largely the Fisheries Industry & related business domain.

BROAD QUESTIONS ON THE CASE:

Q.1: Discuss the dynamics of Fisheries Industry in India & the strategic skills associated with such Businesses.

Q.2: Explain the challenges & struggle of Fisheries Industry in India. Cite relevant examples while highlighting the competitive landscape.

Q.3: Discuss the success stories & pitfalls of Fisheries Industry in India.

POTENTIAL SOLUTION: (Responses to the Dilemma)

1. **Control fishing effort:** Rather than imposing bans alone, linking compliance with economic incentives (e.g., fuel subsidies, credit, insurance eligibility) encourages

sustainable fishing. This aligns sustainability with income protection, making compliance a rational choice for fishers

2. **Reduce selling urgency:** Strengthening producer organisations and introducing digital auction systems at landing centres would reduce distress selling. This improves price discovery and augments negotiation power for fishers rather than leaving them at the mercy of intermediaries
3. **Protect the initial 30 minutes after docking:** Installing small ice plants, insulated storage units, and basic handling facilities at landing points immediately reduces spoilage. This tackles post-harvest losses effectively at the first critical point after catch
4. **Reward transparency:** Aligning insurance and compensation mechanisms with early disease reporting at the community level creates better transparency. This lowers overall losses by enabling faster containment and cooperative risk sharing
5. **Stabilize income:** Providing off-season employment in value chain activities (processing, net making, cold-chain operations) offers income continuity when fishing stops due to extreme weather. This strengthens resilience without compromising catch seasons

CASE BENEFICIARIES:

- The representatives of the respective Industry shall benefit from the case study.
- The UG & PG Students with special reference to Commerce & Management have strong potential of learning from the case.
- The start-ups in the relevant industry with respect to ancillary business profile will have good reference of the case.

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