FISHERIES & AQUACULTURE SECTOR
INDIA RANKS:

**1ST**  
Inland Capture Fish Production (2021-22)

**2ND LARGEST**  
Aquaculture Producing Country  
68% of India’s fish production is from Aquaculture

**3RD LARGEST**  
Fish Producing Country  
India Accounts for 8% of Global Fish Production

**4TH LARGEST**  
Fish Exporting Country  
India’s marine exports (2021-22)  
USD 7.76 billion

14%  
Average annual growth rate of seafood exports (2011 to 2021)

87.5%  
Annual growth rate of fish production (2011 to 2021)

22 FOLD INCREASE  
in fish production since 1950

8%  
Average Annual Growth Rate of Fisheries Sector in India  
(2013-14 to 2021-22)

6.72%  
Contribution of Fisheries Sector to Agriculture GVA
**INDIA**

16.25 MMT

**INDIA**

6.31 KG

**Fish Production**
2021-2022

**Per Capita Fish Consumption**
2021-2022

**TOP IMPORTING COUNTRIES:**
USA, China, South East Asia, European Union, Japan and Middle East

22 fold increase in fish production since 1950

8%

Average Annual Growth Rate of Fisheries Sector in India (2013-14 to 2021-22)
6.72%

Contribution of Fisheries Sector to Agriculture GVA
GROWTH DRIVERS

Increasing Domestic Demand
- Fish is an affordable, protein-rich nutritional dietary choice
- The sector ensures nutritional security to the world’s increasing population

Supply Side Advantages
- India’s diverse water resources provide a dynamic range of fresh and marine waters provide thriving ecosystem for culture and/or capture of fish and other aquatic organisms
- More than 10 percent of the global biodiversity in terms of fish and shellfish species found in India.
- EEZ of 2.02 million sq km and underutilized inland waters boost the Indian fisheries and aquaculture sector

Gross Value Addition
- Contribution of fisheries sector to the Agriculture GVA is expected to reach 9% by 2024-25

Export Potential
- Fisheries exports are expected to more than double to INR 1,00,000 Cr by FY 2025.
- The aquaculture sector has contributed 69.84% of exported items in terms of USD and 48.63% in terms of quantity during FY 2021-22

Proactive Government Policy and Support
- Fisheries and Aquaculture Infrastructure Development Fund (FIDF)- INR 20752 2.48 Cr
- Pradhan Mantri Matsya Sampada Yojana (PMMSY)- INR 20,050 Cr
- Kisan Credit Card (KCC) to help meet farmers with their working capital requirements
- A new sub-scheme Pradhan Mantri Matsya Kisan Samridhi Sah-Yojana (PM-MKSSY) under PMMSY, announced with targeted investment of INR 6,000 Cr to further enhance the livelihood of the stakeholders engaged in the fisheries sector
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OPPORTUNITIES

INLAND FISHERIES

- Establishment of hatcheries and feed units (for quality seed and feed)
- Species diversification and Initiatives such as the development of an Integrated Aqua Park
- Enhance production by establishing brackish/saline/alkaline water aquaculture systems such as RAS, Composite Fish Culture, Biofloc etc. and for reservoirs, lakes, and rivers use of cage culture and pen culture
- Development of Integrated fish culture (Integrated paddy cum fish culture, duck cum fish culture, etc.) and Wetland Fisheries

Inland Fisheries Resources

<table>
<thead>
<tr>
<th>Resource</th>
<th>Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rivers &amp; Canals</td>
<td>0.28 million km</td>
</tr>
<tr>
<td>Tanks &amp; Ponds</td>
<td>2.45 million ha</td>
</tr>
<tr>
<td>Reservoirs</td>
<td>3.15 million ha</td>
</tr>
<tr>
<td>Brackish water</td>
<td>1.24 million ha</td>
</tr>
<tr>
<td>Flood Plain Lakes</td>
<td>1.2 million ha</td>
</tr>
</tbody>
</table>
India’s Inland Fisheries Production in 2021-22 stood at **12.12 MMT**

Top 5 Inland Fisheries Producing States

- Uttar Pradesh
- Bihar
- West Bengal
- Odisha
- Andhra Pradesh
OPPORTUNITIES

MARINE FISHERIES

- Establishment of Small/ Large Marine Finfish Hatcheries
- Marine Finfish Nurseries
- Establishment of Open Sea cages
- Seaweed culture for increasing production with Monoline/Tube net methods
- Bivalve Cultivation (mussels, clams, pearl etc.)

Marine Fisheries Resources

<table>
<thead>
<tr>
<th>Resource</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length of Coastline (Km)</td>
<td>8118</td>
</tr>
<tr>
<td>Fish Landing Centres</td>
<td>1547</td>
</tr>
<tr>
<td>Continental Shelf Area (million sq. km)</td>
<td>0.53</td>
</tr>
<tr>
<td>Exclusive Economic Zone (million sq. km)</td>
<td>2.02</td>
</tr>
<tr>
<td>Fishing villages</td>
<td>3461 Nos.</td>
</tr>
</tbody>
</table>
India’s Marine Fisheries Production in 2021-22 stood at **4.13 MMT**

**Top 5 Marine Fisheries Producing States**

- Gujarat
- Andhra Pradesh
- Karnataka
- Tamil Nadu
- Kerala

Lengh of Coastline (Km) 8118
Fish Landing Centres 1547
Continental Shelf Area (million sq. km) 0.53
Exclusive Economic Zone (million sq. km) 2.02
Fishing villages 3461 Nos.

India’s Marine Fisheries Production in 2021-22 stood at **4.13 MMT**
TECHNOLOGY INFUSION AND ADOPTION

DEEP SEA FISHING

Digital advancements in sector such as Internet of Things (IoT) to optimize management of resources. Traceability systems to improve the linkages in value chain. Technological interventions at production and post harvest level for better price realization. Establishment of small/medium/large RAS /Bio floc culture system. Fish surveillance and movement for sustainable harvest.


India’s Export of Ornamental Fisheries in 2021-22

USD 4.54 million 222 Metric Ton

India’s Top Export Destination for Ornamental Fisheries

Thailand, China, Singapore, UAE, Jordan, Hong Kong, Taiwan

Potential states identified for development of Ornamental Fisheries

Tamil Nadu, Gujarat, Kerala, West Bengal, Karnataka, Assam, Manipur, Odisha

Largest ornamental fish producing states

West Bengal and Tamil Nadu
TECHNOLOGY INFUSION AND ADOPTION

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- Traceability systems to improve the linkages in value chain
- Technological interventions at production and post harvest level for better price realization
- Establishment of small/medium/large RAS /Bio floc culture system.
- Fish surveillance and movement for sustainable harvest.

DEEP SEA FISHING

- Support for acquisition of Deep-Sea fishing vessels for traditional fishermen
- Upgradation of existing fishing vessels
OPPORTUNITIES

POST-HARVEST & COLD CHAIN INFRASTRUCTURE

- Construction & Modernization of Cold Storages/Ice Plants
- Fish transportation of facilities like refrigerated/insulated vehicles
- Live fish vending Centres
- Establishment of value addition units like RTE/RTC etc.
- Establishment of Integrated Aquapark with research centers

<table>
<thead>
<tr>
<th>Facility</th>
<th>Count</th>
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<tr>
<td>Total Fish Landing Centres</td>
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<tr>
<td>Major Fishing Harbours Commissioned</td>
<td>7</td>
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<tr>
<td>Minor Fishing Harbours Commissioned</td>
<td>67</td>
</tr>
<tr>
<td>Processing Plants</td>
<td>622</td>
</tr>
<tr>
<td>Cold Storage</td>
<td>682</td>
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<td>Chilled Storage</td>
<td>44</td>
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<td>Dry Fish Storage</td>
<td>88</td>
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<td>Other Storage</td>
<td>51</td>
</tr>
<tr>
<td>Approved Aquatic Referral Labs</td>
<td>24</td>
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MARKETS AND MARKETING INFRASTRUCTURE

- Construction of fish retail markets including ornamental fish/aquarium markets.
- Construction of fish kiosk/retail units
- Species wise marketing for increasing domestic consumption
- E-platform for e-trading & e-marketing of fish & fisheries products
- Construction of Modern Fish Markets

AQUATIC HEALTH MANAGEMENT

- Establishment of Disease diagnostic & quality testing labs
- Disease diagnostic & quality testing Mobile labs/clinics
- Aquatic Referral Labs

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OPPORTUNITIES

DEVELOPMENT OF FISHERIES IN NORTH-EASTERN & HIMALAYAN STATES/UTS

- Establishment of Trout Fish Hatcheries
- Construction of Raceways
- Inputs for Trout Rearing Units
- Construction of New Ponds in Himalayan Region
- Establishment of Mini/Medium RAS for Cold Water Fisheries
- Input support for Integrated Fish Farming
- Establishment of Cages in Cold Water Regions

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<thead>
<tr>
<th>NE/Himalayan States</th>
<th>Total inland water bodies (lakh Ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arunachal Pradesh</td>
<td>3.18</td>
</tr>
<tr>
<td>Assam</td>
<td>1.35</td>
</tr>
<tr>
<td>Himachal Pradesh</td>
<td>0.43</td>
</tr>
<tr>
<td>Jammu &amp; Kashmir</td>
<td>0.3</td>
</tr>
<tr>
<td>Manipur</td>
<td>0.1</td>
</tr>
<tr>
<td>Meghalaya</td>
<td>0.1</td>
</tr>
<tr>
<td>Mizoram</td>
<td>0.02</td>
</tr>
<tr>
<td>Nagaland</td>
<td>0.67</td>
</tr>
<tr>
<td>Uttarakhand</td>
<td>0.21</td>
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FISHERIES MANAGEMENT AND REGULATION

Monitoring, Control and Surveillance (MCS)
- Communication/Tracking Devices for traditional & motorized vessels

Strengthening of safety and security of fishermen
- Providing safety kits for fishermen of Traditional & Motorized Fishing Vessels
- Providing Boats & Nets for Traditional Fishermen
- Support to Fishermen for PFZ devices & network including the cost of installation & maintenance

Fisheries extension and support services
- Digital Extension & Allied Services
- Phygital (Physical + Digital) models for extension services

Insurance of Fishing Vessels and Fishermen
- Insurance premium subvention for fishing vessels & Insurance premium for fishers

OPPORTUNITIES
DEVELOPMENT OF FISHERIES IN NORTH/EASTERN & HIMALAYAN STATES
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India’s FDI Policy
100% FDI allowed through automatic route in Pisciculture & Aquaculture

FISHERIES AND AQUACULTURE INFRASTRUCTURE DEVELOPMENT FUND (FIDF)

- Dedicated fund worth ₹ 7522.48 Crore
- Funding Pattern:
  - Loan eligibility up to 80% of the estimated/actual project cost
  - At least 20% of the project cost to be contributed by beneficiaries
  - Interest subvention*: Up to 3% P.A.
  - Loan lending period: 5 Years from 2018-19 to 2022-23
  - Maximum repayment period: 12 years
PRADHAN MANTRI MATSYA SAMPADA YOJANA (PMMSY)

- ₹ 20,050 Crores worth of Investment for 5 FYs from 2020-21 to 2024-25
- Multiple beneficiary orienting subsidies schemes have been made available
- Pradhan Mantri Matsya Kisan Samridhi Sah-Yojana (PM-MKSSY), a new sub scheme under PMMSY announced with an outlay of ₹ 6,000 Crores to enhance the livelihood of the stakeholders engaged in the fisheries sector

PRADHAN MANTRI KISAN SAMPADA YOJANA (PMKSY)

- Scheme for Creation of Infrastructure for Agro Processing Clusters (APC)
- Scheme for Creation/Expansion of Food Processing & Preservation Capacities [Unit Scheme] (CEFPPC)
- Scheme for Integrated Cold Chain and Value Addition Infrastructure (Cold Chain)
- Food Safety and Quality Assurance Infrastructure (FTL)
- Operation Greens- long Term Interventions (OG)
KEY STAKEHOLDERS
HOW WE HELP INVESTORS

- Research Content Provided
- Policy Advisory/Representation
- Stakeholder Meeting
- Site Visits
- Location Analysis
- Issue Resolution
- Regulatory Clearance Facilitation

Phone No: 011 2304 8155
Email ID: fisheries@investindia.org.in

First Floor,
Vigyan Bhawan Annexe,
Maulana Azad Road, New Delhi - 110011

SCAN TO KNOW MORE