Chapter 3

MARKETING OF CURED / DRIED FISH
3.1. Introduction

The marketing of dried fish is not done in a defined structure as in the case of frozen fish. The field investigation showed that only small quantity of cured or dried fish is exported from India including accelerated freeze-dried prawns. The cured and dried fish are mainly covered in the internal marketing system and is not well structured. There is no clear chain of production, storage and distribution of cured and dried products in an organized manner (Anon., 1969). The curing of fish is seasonal and the storage and shelf life of these products are not studied well and pose problems. Producers are forced to sell the product as soon as the finished product is ready or as soon as the cured fish is taken out from the salt. The marketing people are the authority to fix the price to the product, depending on the demands of the products, the season and availability. They are well aware of consumer reaction to the products. The annual reports of the cargo movement shows that 1,44,570 kg of dried shrimp, shrimp shells and clam were exported during the year 2001 and 3,32,535 kg of dried shrimp and clam were exported during 2002 and during 2003 the export included clam, shrimp and shark with a total quantity of 4,24,426 kg (Anon., 2003b).

3.1.1. Marketing of dried fish

3.1.2. Marketing issue

Anon. (1969) reported that there were 7 important dry fish markets in Kerala including Alwaye and Changanacherry. The products once accepted by public could be marketed and can be expected to fetch more revenue. Advanced technology to store the cured fish product is essential. But it is very difficult in this sector as this involves very complex system of production and marketing of fish. It also involves a complex series of interactions between fishermen, processors, wholesalers, transporters, and retailers. Anon. (1988a) reported that the dry fish marketing survey of Integrated Fisheries Project (IFP) was encouraging at High range region and Kottayam.
The economic condition of the society is a fundamental prerequisite for the successful adaptation of a new technology which is essential for profit making. The profitability in turn partly depends on the market demand of the products and the price per unit cost. The technological improvement increases the costs of production and the excess will be passed on to the consumer thereby discouraging purchase. The remaining part of increased cost must be born by the processing and marketing chain. The increase in unit price of the product can be brought down by large-scale production using modern technology. Further marketing of the product depends on the consumers taste and preference. Reducing loss and keeping high quality will be an added point (Anon., 1987).

3.1.3. Transportation and handling of dried fish

At present there is no better way of transportation of dried fish. The people like fresh fish better than dried fish. The main transportation is by road (Anon., 1984) and rail, waterways, bicycle, trucks and hand-carts (Gopakumar, 1996). Further it may be noted that people living at hilly places are not getting even dried fish for their daily needs. So it is considered to be a costly item. This may be due to non-availability of dried fish in the market.

3.1.4. Marketing factors and Socio–Economics of people

A clear survey is needed on the socio-economic condition and marketing relationship. This will give a clear picture of the needs, likes and dislikes, and other aspect of the product development in relation to the public and marketing factors. Extension assistance may be required to encourage both the development of required input and marketing of products. New source of credit may be needed to provide the initial finance for inputs for technical innovations and for subsequent marketing activities.
3.2. Aim

Most of the people in Kerala are fish consumers, so the fish has to be marketed to the interior places. The cured fishes are marketed though some important markets and from outside states. So the study of flow of cured products is essential. Anon. (1969, 1984) reported that the important dry fish markets in Kerala are Kottayam, Changanacherry, Alwaye, Idukki, and Palghat. The important near by fish markets Alwaye and Changanacherry were selected for the present study.

This study is aimed to find:

- The important cured fish or dried fish available in domestic market and their rate at different seasons the better sold fish.
- To study the purchase and selling system of cured and dried fish.
- The arrival of varieties of fishes from out side states, their packing and consumer acceptance.
- Influence of out side market and fresh fish arrival in the market.
- The influence of festivals and other season on market of cured and dried fish.
- To find the approach of people towards smell of dry fish and cured fish.
- The storage strategy of cured and dried fish at different seasons and to increase the shelf life.
- The welfare of workers engaged in this trade.

3.3. Materials and Methods

The important cured fish markets in Kerala are Alwaye in Ernakulam district and Changanacherry in Kottayam district. Four wholesale stalls from Alwaye and three wholesale stalls from Changanacherry are selected and the required information were collected as per the questionnaire (in annexure B) used by Balasubramaniam & Kaul (1982). The data collected was tabulated for two years 1997 –1998 and 1998 – 1999. The purchase and sales quantity was calculated with the average monthly rate and the
average purchase and sales value were also calculated. The problems in marketing of cured fish were noted with workers problem.

3.4. Results

3.4.1. Alwaye market

Whole sale merchants have 20 to 35 years experience and they are of the view that dried fishes were not preferred by people due to smell and their interest is towards fresh fish. There are seven wholesale fish dealers in the market. The wholesale dealers purchase the fish from here and transport to all interior places like Changanacherry, Kumuzhi and Malampuzha. Yet cured fish does not reach most of the remote places due to lack of transport facilities. The different varieties of fish include mackerel, ribbonfish, shark, sardines, anchovies, silver belly, malabar sole etc. At the very sight of the packing they are able to identify the place of origin of product. Usually palm tree leaf (Gopakumar, 1996) pack is from Tamilnadu / Pondicherry and coconut leaf pack is from local place, bamboo or gunny bag pack is from Orissa / Gujarat / vizag. The cured fish from Andrapradesh is prepared from rock salt and the saltiness is less and with more impurities. They identify the quality of fish by experience, appearance, colour and odour. They store for a maximum period of two weeks and with in the period they try to sell the product. During rainy season, due to high relative humidity the storage of cured fish and dry fish is very difficult and lead to spoilage and incur loss to them. So more salt is added to preserve the cured fish. The spoiled fish is used as manure. Their approximate turn over is Rs 1.5 to 2.0 lakh and attains a profit of 5 to 10% per annum.

The fish merchants have no guidelines about the purchase or sales of cured fish on quality either from Central or State Govts. Demand for dry fishes increase from April to August as the monsoon season starts. The merchants have strong preference for different product from different state, as shark, ray and dhoma are preferred from Gujarat. Ribbonfish, anchovies and silver belly are received from Tamilnadu and
Pondicherry. Shark, anchovies and ribbonfish are brought from Orissa and Andrapradesh. The average total quantity of fish purchase was 1,46,161 kg and value was Rs. 23,55,639/- . The total average sale of fish was 1,44,720 kg and value was Rs. 28,52,836/-. The percentage contribution of important fishes were mackerel, shark, ribbonfish, sardine, lesser sardine, silver belly, anchovies, lizardfish, dhoma and kilimeen (Figure – 3.1 & 3.2).

3.4.2. Workers

There are two groups of workers in the market namely, the workers under the direct control of merchants and loading and unloading workers. The office workers do not have any union and they carry out the works connected with office and sales. They are under the direct control of the owner or his agents. They are provided with monthly salary and other benefits. The loading and unloading workers are directly controlled by unions and are paid Rs 4/- per basket, and merchants do not grant them other benefits. The State govt. started a unit called “Fisherman welfare board” having its branches all over kerala to help these workers with certain rules. The loading and unloading workers have union affiliated to CITU. But no separate union to deal their purpose.

3.4.2.1. Changanacherry

This market is in high range region in Kottayam district. There are four wholesale merchants of which three are well functioning. They had more than 20 years experience in cured fish business. According to them, dry fish have good demand but it is not available. So the number of fish retail stalls reduced to 10 from 14. They usually get fish from different state enrouted through Alwaye or directly. The cured fish from Tamilnadu is always packed in palm leaf and in land cured fish were in coconut leaf. Andrapradesh people use gunny bags and Gujarat use bamboo baskets. The merchants identify the quality by appearance, colour and odour. They store fish for one or two weeks with out any quality difference and they add more salt to fish. The relative humidity of the market
is usually more than Alwaye as it is a hilly place. The spoiled fish is used as manure to coconut trees. They reported that black insects may occur after one month and no other preservative except salt is added. The pink colour is an important problem and sometimes they rewash in salt solution and add more salt. Their annual expenditure is about Rs 80,000 to 90,000 and the profit is 5 to 9%. They have 4 to 6 casual workers and are paid Rs 2,000/- per month.

The merchants reported that the people prefer fresh fish but unlike at Alwaye, people have no shyness to carry cured fish. Festivals and other important days do not have any influence on sales of cured fish. Three to four months from April to August have high demand for all type of cured fishes. The products are sold on sell and pay basis. The fish is despatched to Malampuzha, Thekkady and other hilly areas. The total average purchase quantity was 69,345.5 kg and the value was Rs 13,45,171/- and the total sale was 67,799.65 kg and the value was Rs 15,33,248/-. The purchase contribution of fishes were mackerel, shark, ribbonfish, sardine, lesser sardine, silver belly, anchovies, lizardfish, dhoma and kilimeen (Figure – 3.3 & 3.4).

3.5. Discussion

The study in this field is limited. The results at Alwaye showed that the sale of fish was by 0.99% more than purchase of fish during the year and the value was more by 21.11%. This showed that the stock from previous year also sold. There is not much loss in product due to any reason except due to spoilage etc. The average percentage purchase quantity and sales quantity had equal effects and it showed that there was not much loss. The purchase and sales value show that there is a slight increase in mackerel and more in shark in the sales than purchase price. In all other varieties, the values are fluctuating. Shark is an important dried product and widely accepted by the people due to it’s medicinal value. The data shows that the cured fish had high price during monsoon season.
The study at Changanacherry showed that the cured fish had high price than in Alwaye market. There was a decrease in sale of 2.23% than purchase quantity but the sales value increased by 13.96% than purchase value. The arrival of less quantity of cured fish had reduced the number of stalls. The cured fish marketing faces problem and there is no planned marketing due to the shorter shelf life. The Alwaye fish market is a centralized one to receive dry or cured fish from all part of India. Telephone helps to pass information on market trends and the rates are ascertained to the product and products are received. The market for cured or dried fish at Alwaye is always flexible and can't be assured. So the other local markets are affected due to the high fluctuations of the products. Further, the products from other States have lower cost than the local cost, which most often affects the local on auction and sales. So there is a need to ensure between demands and supply as noted by Gupta et al. (1983).

During Ester and Onam festivals and other fasting days of some religious functions people usually prefer only vegetarian food (Gupta et al., 1983) and the demand for fish is reduced. So the cost of fish decreases and this affects on the curing units and market value of the products. The availability of fresh fish affects the cured fish market because people like fresh fish more than cured fish for the fresh taste. The fresh fish in the iced condition can have fresh taste for 3 to 5 days so the fresh fish in the iced condition is transported to interior places in vehicles. So the people go for the same and the demand for cured fish decreases.

The general trend of people is that they dislike the odour of cured / dried fish and they prefer to take fresh fish and to keep in refrigerator. So majority of the society ladies avoid the use of cured fish inspite of the fact that it is a nutritionally balanced food. Storage of cured fish is another important factor. Storing the cured fish in refrigerator (Gupta et al., 1983) or in open condition also causes concern. If the temperature is high and relative humidity is low, the product will dry due to moisture loss and if the
atmospheric temperature is low and relative humidity is high the product will absorb moisture and cause easy spoilage. This prevents the merchants and curers from storing cured fish for long period. Further, long storage at ordinary condition causes strong smell and discolouration and affecting the acceptability of product. Quality aspects of cured and dried fish are not properly cared neither by curers nor by the merchants. They only aim for high price based on the assumption that better appearance is the best quality.

So it is suggested that the Central (MPEDA) or State Govt. may provide technical guidelines to market cured fish and dried fish. Quality check is essential and must be carried out by qualified authorized agency for such purpose. The low quality cured fish are sold at a lower rate. Cured or dried fish marketing society is an essential one to help people in this sector. Cured or dried fish may be purchased through these societies. The quality check shall be done by the qualified technician in the society and marketed through them to the interior place in kerala. Dry or cured fish outlets may be opened in high range areas where sea fishes are not available. This can be a boost to people to get the good quality cured fish at a reasonable rate. So both govt. and people of high range can be benefited from the private vendors. The products can be sold on the “first come first out basis” as suggested by zugarramurdi et al., (1993). This will be also a boost to the medium plant and lower class curers and the people in the hilly area as well.

The office workers and loading and unloading workers may be granted contributory provident fund benefit as in Govt. institutions after regularising the rules, so that it may be able to them to have a future in their work. They may have a membership in the fisherman welfare board.
Figure - 3.1. Average fish purchase and value and both in % composition at Alwaye market.
Figure - 3.2. Average sales and value and both in % composition at Alwaye market
Figure - 3.3. Average purchase and value and both in % composition at Changanacherry market
Figure – 3.4. Average sales and value and both in % composition at Changanacherry market