CHAPTER –XI

Recommendations & Summary,
Gains, Limitations, Scope for further work

Findings:-

Industry faces significant challenges…

The quantity of firms are declining. As an aftereffect of the checked change in species blend, market necessities and the movement to adrift handling, about forty plants captivate principally in lobster delivery, while thirty or somewhere in the vicinity just purchase and offer (essentially lobster and crab). Around forty permit holders are inert.

Throughput is reducing. This is most apparent with groundfish, because of the absence of recuperation of neighborhood stocks and the decrease in foreign made crude material because of increasing expenses. Worldwide rivalry is additionally driving processors to concentrate on the new market, bringing about less esteem including movement inplants. Thespecies blend and changing innovation likewise add to less onshore preparing. Lobsterscallop, surfshellfish and shrimp obliges restricted on-shore handling either on account of business prerequisites (lobster) or on the grounds that the vast majority of the preparing is done adrift (scallop, mollusk and shrimp)

Profits are reducing. Processormargins are pressed on both the expense and income sides of the business sector. Higher expenses are attributable to crude material inputs because of solid rivalry, and to climbing creation costs especially fuel utilities, protection and meeting and keeping up quality affirmation programs. Incomes have declined essentially in view of the decrease in the estimation of the Indian Rupee to USD, additionally in light of expanded focused weights from minimal effort makers and more prominent business quality of purchasers and merchants.

Work power is vanishing. Numerous processors report it is progressively hard to enroll and
hold a work power with the abilities and investment expected to work a fish plant. The workforce is maturing, and more youthful individuals have practically no enthusiasm for this sort of vocation, especially with its regular structure and moderately low wages. Outrelocation levels from waterfront groups is high as better-taught youngsters look for circumstance somewhere else. While giving a salary supplement in the off-season that has generally kept the workforce at home, adds to the work deficiency at sure times of year in light of the fact that a few laborers want to keep on drawing, as opposed to acknowledge fleeting vocation when it is advertised.

In light of an asset move far from groundfish to shellfish, numerous handling organizations needed to conform to new species, items, innovation and markets. Just a modest bunch keeps on spend significant time in groundfish, depending primarily on restricted nearby assets. This segment keeps on declining as rivalry drives up crude material expenses and drives down item costs. Most plants now report shellfish as the overwhelming species bunch, with lobster the principle species. Organizations occupied with scallop shrimp and surfshellfish creation have ended up progressively capital concentrated, with more noteworthy concentrate on adrift transforming.

- Items: with few special cases, plants in the area fail to possess the size and assets to endeavor to create or adjust new items, depending rather on what they know and what has worked previously. Be that as it may determined by declining edges, some are investigating new items and cornermarkets (counting lobster and scallop).

- Markets: the verifiable reliance on the U.S. business seems, by all accounts, to be lessening. This is determined by two key elements – the declining estimation of the Indian Rupee V/s USD (influencing all species) and expanding weight on costs emerging from oversupply in key markets (fundamentally shrimp). The organizations are compelled to look to different markets to discover more beneficial open doors. This implies less live lobsters, scallop, and groundfish to the U.S.A also more to the EU and Far East, and less shrimp to the EU and more to developing markets including China and Russia.

- Technology: Though huge numbers of the transforming organizations have put little or nothing in plant and supplies in the previous quite a while, a few organizations
have done as such with a specific end goal to react to market opportunities or to enhance proficiency. A great part of the venture has happened in the lobster segment. Numerous plants have put resources into dry area holding offices with a specific end goal to differentiate their operations and exploit off-season market opportunitie

- One expansion is by the method for reliance on live lobster utilizing new innovation to create a line of crude solidified items. Firms are additionally putting resources into vessels with adrift solidifying limit (scallop and shellfish) so as to enhance item quality and effectiveness (and lessening the prerequisites for on-shore preparing limit).

- Lowcostmakers. China and other Far East countries have entered the worldwide fish business, contending specifically by preparing industry in its conventional markets, offering the same items or close substitutes at costs neighborhood organizations discover hard to me.

- Sustenance traceability/security. The business has needed to redesign offices and frameworks to meet CFIA gauges. The business can hope to be obliged to meet considerably more stringent measures of nourishment wellbeing as a universal concern over sustenance security and traceability develops.

- Economizing and supportable fisheries. Purchasers are putting weight on real merchants and retailersto guarantee the fish they offer starts from fisheries that are overseeneconomically. At present, just the Marine Stewardship Council (MSC) confirmation framework is broadly perceived in the commercial center and a considerable lot of the main retailers in the EU and U.S.A are exhorting suppliersthat the items they ship will need to shoulder the MSC logo. With contenders looking for MSC accreditation for such species as shrimp and lobster, the weight will be onto have our fisheries guaranteed too. Securing the confirmation would influence the capacity to get to business sectors and subsequently the estimation of the items.

- The divided business structure and aggressive environment coming about because of it are generally the result of the administrative system representing the business.

- Authorizing arrangement. This has the extension to focus the number and size of plants allowed to process every species. As such, it has the degree to focus industry structure and limit and successfully, the level of intensity amongst plants in their journey to secure crude material and deals. The business holds differing perspectives on the allure of restricting
accessto handling licenses. Somecontend that restricted accessis key to counteract
damaging rivalry (bothin purchasing and offering), whileothers fight thatsimplicity of
sectionis fundamental toguarantee solid rivalry.

• Center is on income not rate of return. The way of the business is such that processors
have a tendency to concentrate on income as opposed to routine pointers of monetary
wellbeing, for example, rate of return. Income is a noteworthy concern in light of the fact
that most processors can just keep the business passing by offering item when it is
created to take care of the expenses of crude material. Solid rivalry to obtain crude
material and to make deals has a tendency to result in limited edges. To put it plainly, the
industry has a tendency to contend with itself at both closures of the business sector,
basically ensuring aposition ofprogressing shortcoming.

• Access to capital constrained. Withfew exemptions, firmsreport theyhave constrained
access to capitalfrom customary banks (otherthan linesof creditfor workingcapital).
Thisexhibits a testfor a few plantswishing toexpand or-up-evaluationoffices, however for
some it is less of an issue on the grounds that interest in plant and supplies just means
expanded altered expenses, and in the current financial atmosphere these plants need to
stay away from the danger this involves.

The discriminating achievement components for a focused fish preparing industry include:

- Access to consistent supplies of superb crude material, ina perfect world ona yearround
  premise and ata costthat backings focused estimating oflast items and permits areturn
  predictable withlong haul suitability ofthe endeavor;
- Access to sufficient supplies of talented work in light of year-round occupation,
greatworking conditionsand alluring wages;
- Access to the innovation expected to work effectively andintensely, and access to sufficient
  crude material to permit highlimit use rates;
- Access to the stores expected to meet working capital necessities, mediumterm
  prerequisites to exploit item and business advancement opportunities, and more term
  speculation needs to update plant and gear with a specific end goal to stay aggressive
  and meet administrative prerequisites;
- Access to businesseswithout duty and non-tax obstructions is fundamental to permit the business to meet business sector prerequisites on an equivalent balance with its rivals;
- A steady administrative environment giving a useful structure at the reaping, handling and advertising stages, permitting fish processors to contend viably in a worldwide business.

Access to raw material. Most processors depend pretty much solely on crude material got from neighborhood waters. A few plants had foreign made groundfish in the early 1990s, yet this got to be uneconomic. Along these lines, what is accessible generally figures out if we have an industry or not, yet the terms under which it is secured goes far in deciding industry structure and its monetary wellbeing. In this admiration, access to crude material and an alternate achievement variable – the administrative structure – are nearly interlinked.

The best organizations impart one regular trademark – they are vertically incorporated from sea to client. Subject to asset conditions and administration contemplations, these organizations have the capacity to depend all alone vessel to supply all or the greater part of their material, permitting them to indicate quality gauges and conveyance places.

This permits them to practice more prominent control over expenses and to meet creation arranges, and empowers them to create longhaul showcasing plans with retail and sustenance administration organizations in key markets. It additionally gives a premise to item improvement and interest in the innovation and promoting expected to make and extend piece of the overall industry.

Access to capital tends not to be difficult for these organizations the length of they are decently overseen and produce acceptable money related results. The best shortcomings confronting non-vertically coordinated organizations emerge from the instability encompassing the accessibility and nature of crude material, furthermore to the profoundly regular supply design normal for the inshore fishery. Despite the fact that most processors workout regular supply courses of action with vessels or purchasers, these can be and are disturbed, with organizations either losing supply to contending plants or confronting sudden changes in crude material costs. This leaves plants working on a regular premise, with constrained capacity to create advertising arrangements.
and the generation and speculation choices spilling out of them. This leaves processors with constrained haggling power and spots them in a high-hazard class according to routine banks.

Access to skilled manpower. Supply conditions are at present palatable for most processors more often than not, however numerous likewise report that their workforces are maturing and supplies are liable to be deficient in the following years, especially for employments obliging specialized aptitudes. Individuals are additionally less ready to take occupations in plants in light of the fact that the work is regular or wordy, and the wages have a tendency to be below. Not one or the other of these conditions is liable to change soon, given the arriving examples for key species and the need to stay aggressive with minimal effort makers.

Access to financing. Most plants report restricted access to long-haul financing from routine banks. A few components including an absence of direct access to crude material, high crude material costs, antagonistic trade rates and solid rivalry from ease makers join to create a poor speculation atmosphere.

Access to businesses. The business appreciates great access to its significant markets, subject to meeting progressively stringent regulations with respect to nourishment wellbeing (traceability and nation of starting point marking). The capacity to show practical fisheries through eco-marking is developing as an alternate element that will influence the attractiveness of items to significant retailers in the EU and the U.S.A.

Anyway from the viewpoint of plant working effectiveness, armada partition introduces the best test. The strategy plans to secure the hobbies of reapers by building aggressive conditions (autonomy of vessels and plants) for the securing of crude material. Vessels advantage from aggressive costs, while plants advantage (hypothetically) from open access to crude material. At the same time open access has brought about an aggressive structure in port markets where value works ineffectively in its impact over the timing, amount and nature of crude material supply. Without such impact over supply, plants are at an extensive hindrance in addressing the needs of the
business sector. In outlining its business permitting arrangement, the hobbies of the business overall ought to be considered.

**Below is an agenda planned to fulfill the goals of Marine Industry:**

- Currently the destruction is caused to the natural water bodies and its flora and fauna due to the various causes of pollution, this in turn result in the decrease of the prawn supply both from natural and cultivated source. The objective is to prevail over and improve the sluggish Export business

- In order to enhance the export business in terms of the numbers as well as to create the additional Jobs for those in need and directly or indirectly related to this business, the best practice is to actively encourage extended products

- As currently the crustacean family species namely the crab, lobster, shrimp, or barnacle are in much demand in the international market, the best strategy is to cultivate these species on a large no. Encourage the export business of the crustacean mainly. Additionally the goal has to be set to increase the production of the frozen sea food products

- Avoid the export to the countries where the returns or profit are low

- Enter in to a new market with the new market - Along with the focus on the most commonly tapped markets Penetrate in to the market segments those were not tapped earlier to expand the export business e.g. – the regions like Australia, Fiji and so on.

- Focus on the big markets with strong economy so that the export product can generate the high revenue, Nevertheless the caution has to be taken to regarding the quality as being the developed economies these countries are highly quality conscious

- As stated earlier the focus has to be on the product extension in the defined group of potential customers.

**To achieve this objective the following measures should be prioritized**

- i) Fisheries should initiate the addition of the innovative species in their farms

- ii) Introduction of the new categories to the existing product range by adding the special features as well as through upgrading the methods of the processing, and better and improved
packaging

- iii) That in turn will drive to use or change to the better and modern technology

- The Exporters should keep the track of the regulations and the blocks imposed by the developed countries.

- Additionally as the whole business is dependent on produce or the yield of the fish ,the exporters should also concentrate on the availability and the cont. source of the fish from all the sources

**Following measures can be undertaken to fulfill the above mentioned requirement successfully:**

- This species can be grown on a large scale as its culture multiplies faster .The reasons being -The highproductivity, abilityto sustainhigh stockingdensity and availabilityof SPF Broodstock.

- It is the responsibility of the MPEDA that they should provide the aid and offer assistance on the various problems that normally occur in the aquaculture of these species ,namely operating the infrastructurehatcheries ,and feedmills ,tackling the diseasesand thequarantine

- Aquaculture and marine society of new fish species with fare potential.- this can be advanced by win checking stores for effect investigation, import of new advancements, brood stock and R&D of the fundamental applicant species such a cobia  tilapia and ocean bass

- Market enhancement through presentation of new plans focusing on the undiscovered/so far ignored districts like Africa, Eastern Europe and Oceania nations.

- Empower setting up of frosty chain, quality testing labs, transportation and conservation and handling base close to the focuses of generation through development plans. This must likewise deal with lessening collect and post-harvest misfortunes Promoting R&D for fare situated aquaculture and catch fisheries by reserving stores for such exercises to be led by different veterinary/horticultural colleges/ICAR foundations/MPEDA.

*A institutional mechanism may take care of the following:*
• Sway examination of the new species which have been permitted to be transported in and societies in India (Tilapia, Pangasius, L.Vannamei)

• Reserving and distributing stores for exploration by different veterinary/horticultural colleges/ICAR establishments/MPEDA on improvement of innovation for aquaculture and presentation of new species which are straightforwardly identified with fare

• Ceaseless assessment of the advancement of statutes, standards and regulations representing quality and wellbeing of marine items.

• Nearly screen non exchange hindrances being set up by the created world and concentrate on significance of both catch and ranch fisheries, including traceability issues

• Enhancements in factual and other information for the division by:
  a) Reinforcing the current arrangement of information accumulation of catch and society fisheries.
  b) Assessing the potential catch fisheries for distinctive fisheries for diverse species, for diverse time periods & for distinctive zones/department

• Observing augmenting DEPB and VKGUY profits just to esteem included items.

• To urge India to turn into a preparing hub, the frameworks and methodology overseeing the import of marine items for handling and re-fare may be streamlined for which a between pastoral board may be set up to deal with the issues

• For getting more range under aquaculture and for empowering marine society, we have to bring board state fisheries and area income Departments to enhance and streamline the methodology of renting and maritime territories.

Our marine resources are declining and they attributed it mainly to the invasion of “Foreign Fishing Vessels, Uncontrolled & Unscientific Fishing activities as well as Lack of Proper Management by the central and state competent authorities” following are the major recommendations put forward for action to stop diminishing of our sea wealth.

➢ Carry out appropriate scientific studies on present marine resources and the reasons behind resource decline, especially from the area within 12nm.

➢ Introduce suitable fishing practice to safe guard the resources, based on scientific studies.
- Restructure the trawl ban period based on proper scientific study.
- Introduce ban period for all type of fishing vessels and for the entire east/west coast.
- Completely ban large foreign fishing vessels from fishing in Indian waters.
- Strictly regulate the number, size and engine power of fishing units operating in Indian waters.
- Regulate fishing vessel registration to control the proliferation of fishing vessels.
- Carry out an actual census of fishing vessels operating in Indian waters.
- Bring boat yards under the regulations and carry out timely monitoring.
- Fishing license should be given only for true fishermen.
- Ban import of high powered boat engines from foreign countries.
- Regulate engine power to a maximum of 250 HP.
- Uniform engine power (I-IP) can be introduced along the entire coast.
- Implement strict regulatory measures by the Government to stop unscientific fishing practices like pair trawling, night trawling, fishing, etc.
- Ban trawling during night time and regulate fishing time as from 6am to 6pm.
- Coastal patrolling should be made more efficient.
- Strong network between coastal police, coast guard and state fisheries department is essential to prevent illegal fishing.
- It is high time to bring sufficient modifications in rules and regulations in order to save Indian fisheries sector.
- The law has to be implemented properly and those who are not following it should be punished hardly.
- Strictly implement measures like mesh size regulation, minimum catch size etc. to avoid destruction of juvenile fishes.
- Mesh size could be fixed to 20 mm and above, in all type of nets.
- Manufacturing and selling of small mesh sized nets should be regulated and net making factories producing small meshed nets should be banned.
- Juvenile fishing should be banned and minimum catch size can be introduced.
- Include representatives from fishermen and other stakeholders in the committees formed to study various issues in fisheries sector and consider their indigenous knowledge as well as opinions while decision.
Dept. of Fisheries should have control beyond 12 nm.

Pollution in the coastal waters needs to be reduced through proper measures.

Restoration activity for coral reef, sea grass and mangrove need to be carried out all along the coast.

Set up a separate central ministry solely for fisheries.

**Conclusion:**

From the above data analysis it can be concluded that:

- There is positive impact of International Marketing on seafood exporters
- There is huge impact of International Marketing to increase Sales of seafood Exporters
- There is positive impact of Int. Marketing w.r.t Product Quality of seafood exporters
- There is a positive impact of Int. Marketing vis-à-vis Packing of seafood Exporters
- There is a positive impact of International Marketing on Logistic of seafood exporters
- There is a huge impact of Int. Marketing concerning to Branding of seafood exporters
- There is no impact of Int. Marketing on Customer Credit Facility of seafood exporters
- There is positive impact of International Marketing on Advertising & Promotion of seafood exporters
- There is no impact of Int. Marketing on Competitive Advantages of seafood Exporters.
- There is positive impact of International Marketing on Pricing of seafood exporters
- There is huge impact of International Marketing on New Markets for seafood exporters