



**Streamlining the
Supply Chain of
Marine Fish in Kerala:
COVID-19
and Beyond**



Indian Council of Agricultural Research
Central Marine Fisheries Research Institute
Post Box No. 1603, Ernakulam North P.O.
Kochi- 682 018, Kerala, India





**Streamlining the
Supply Chain of
Marine Fish in Kerala:
COVID-19
and Beyond**



Indian Council of Agricultural Research
Central Marine Fisheries Research Institute
Post Box No. 1603, Ernakulam North P.O.
Kochi- 682 018, Kerala, India





Streamlining the Supply Chain of Marine Fish in Kerala: COVID-19 and Beyond
CMFRI Marine Fisheries Policy Series No. 18/2020, ISSN : 2394-8019

Published by:

Dr. A. Gopalakrishnan
Director
ICAR Central Marine Fisheries Research Institute (ICAR-CMFRI)
P.B. No. 1603, Ernakulam North P.O., Kochi – 682018, Kerala, India
www.cmfri.org.in, Email: director.cmfri@icar.gov.in
Tel. No. +91-484-2394867; Fax. No. +91-484-2394909

In collaboration with

Dr. C.N. Ravishankar
Director, ICAR-Central Institute of Fisheries Technology (CIFT)
CIFT Junction, Willingdon Island, Matsyapuri P.O., Kochi 682 029, Kerala, India
www.cift.res.in, E-mail: director.cift@icar.gov.in
Tel No. +91-484-2412300; Fax: +91-484-2668212

Drafting Committee:

Dr. C. Ramachandran, Principal Scientist, SEETT Division, ICAR-CMFRI, Kochi
Dr. A. Suresh, Principal Scientist, EIS Division, ICAR-CIFT, Kochi
Dr. Shinoj Parappurathu, Senior Scientist, SEETT Division, ICAR-CMFRI, Kochi
Dr. J. Jayasankar, Principal Scientist, FRA Division, ICAR-CMFRI, Kochi
Dr. Nikita Gopal, Principal Scientist, EIS Division, ICAR-CIFT, Kochi

Inputs from: Mr. K.M. Alias, Asst. Private Secretary, Ministry of Fisheries, Harbour Engineering and Cashew Industry, Government of Kerala; Dr. Lawrence Harold, MD, Matsyafed; Mr. Surendran P.P., Deputy General Manager, Matsyafed; Smt. Maja Jose, Deputy Director Fisheries, Ernakulam; Mr. Saju M.S., Joint Director Fisheries, Ernakulam; Mr. T. Dola Sankar, Director (Marketing), MPEDA; Mr. Anil Kumar P., Joint Director (Marketing), MPEDA; Joice V. Thomas, Chief Executive, NETFISH; Dr. Reshma Gills, Scientist, ICAR-CMFRI.

Design & Layout: Abhilash P.R., ICAR-CMFRI, Kochi
Illustrations: David K.M., ICAR-CMFRI, Kochi

Publication, Production and Coordination: Arun Surendran, Library & Documentation Centre, ICAR-CMFRI, Kochi

Printed at: PrintExpress, Kaloor, Kochi

© 2020 ICAR-Central Marine Fisheries Research Institute, Kochi

All rights reserved. Material contained in this publication may not be reproduced in any form without the permission of the publisher.

Suggested Citation: C. Ramachandran, A. Suresh, Shinoj Parappurathu, J. Jayasankar, Nikita Gopal, K.M. Alias, Lawrence Harold, Surendran P.P., Maja Jose, Saju M.S., T. Dola Sankar, Anil Kumar P. Joice V. Thomas, Reshma Gills, A. Gopalakrishnan and C.N. Ravishankar (2020) Streamlining the Supply Chain of Marine Fish in Kerala: COVID-19 and Beyond, CMFRI Marine Fisheries Policy Series No.18/2020, ICAR-Central Marine Fisheries Research Institute, Kochi, 30p.

Preface



Kerala contributes close to one-fifth of the total marine fish landed in India. With over 5.6 lakh coastal fisher folk population, a prominent post-harvest value addition and export sector and growing inland capture and aquaculture segments, fisheries plays a vital role in Kerala's economy. The Government of Kerala has been ever supportive to the needs of fishers and allied workers with its continuing patronage, developmental initiatives and social security measures.

The COVID-19 crisis which was unleashed in the country during the first quarter of 2020 had a severe impact on the Kerala economy. Like several other core sectors, fisheries and allied activities of the state also bore the brunt of the crisis and the ensuing lockdown had brought the whole supply –distribution value chain to a standstill. Notwithstanding this, the Government of Kerala has been successful in preventing a complete breakdown of the sector through controlled fishing and value chain activities respecting guidelines from the Health Department. The Government also tried innovative and exemplary fish marketing arrangements that helped both the fishers and consumers alike.

The present state of affairs in the fisheries sector has been unprecedented and deserves special attention on account of several reasons. On the one hand, the situation presents no signs of receding over the next several months, and would demand continuing interventions to regulate fishing and fish marketing activities. On the other hand, there are several rigidities associated with the sector that needs serious commitment, long-standing effort and futuristic solutions.

This policy paper, originally prepared as a report at the behest of Smt. J. Mercykutty Amma, the Hon. Minister of Fisheries, Harbour Engineering and Cashew Industry, Government of Kerala, is an earnest effort in this direction and contains several scientific and well-thought out recommendations that would aid in streamlining fish value chains in the state. The policy paper, has been compiled by the Social scientists of ICAR-CMFRI and ICAR-CIFT who also did a diagnostic analysis of the value chains using valuable inputs from practitioners and policy makers in the field as represented by Matsyafed, MPEDA and Department of Fisheries. I respectfully acknowledge the protracted, but valuable interactions for which the Hon. Minister took a personal interest before finalising the recommendations. I sincerely acknowledge the support provided by all these agencies and especially Dr. C.N. Ravishankar, Director ICAR-CIFT in this venture.

Kochi
23 June, 2020

A. Gopalakrishnan
Director, ICAR-CMFRI

Contents

Introduction	01
Fish marketing in Kerala: An overview	02
Demand-supply scenario	04
Estimation of economic losses due to COVID-19 in Kerala's marine fisheries	07
Streamlining Kerala's fish marketing system: Key recommendations	08
References	21
Acknowledgements	21
Annexure 1. The modified model of flexi pricing	23
Annexure 2. Tentative prioritization of recommendations	27
Annexure 3. List of participants in the brainstorming session	29
Acronyms/Abbreviations	30

