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A Study on Export of Shrimp From India

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ABSTRACT

India is one of the largest seafood suppliers in the world. The Indian seafood industry touched an all-time high in past several years. India stood as the top spot in shrimp exports to the global market in 2016 with a 13% growth over the previous year. However, India has seen a rise in shrimp export business by 17% between 2012 and 2016. India has increased seafood exports and there is no shortfall. In 2017 until September, India has recorded USD 3533.34 million from seafood exports in which shrimp exports registered approximately 95% of the sales. The seafood commodity come under HS code 03061790 includes shrimps and prawns. Demand for shrimp is leading the increase in Indian seafood exports which totalled USD 3491.48 million between January and September 2017. Seafood has long been an important part of human diets and also a major source of economic value. India exports large amount of food products including fish, crustaceans, molluscs and others. These include fresh, frozen, dried and the source from aquaculture. Here, we take a comprehensive look at the shrimp exports from India between January and September 2017. This paper makes an attempt to analyze the trend of shrimp export

of Indian shrimp production through aquaculture has been increasing consistently over the last 8 years. The study reveals that the frozen shrimp, Tiger shrimp and Prawn are the main exported marine products.

Keywords: Shrimp; Sea Food; MPEDA.

INTRODUCTION

There are more than 400 active shrimp exporters in India. Anjaneya Sea Foods is the largest shrimp supplier in India and did export sales of USD 194.75 million which represents 5.51% of the total's value from January to September 2017. The company has exported 1165033 kilograms of shrimp to seafood importing countries. Indian exporters have in the past few years emphasised on lower-density shrimp farms to control diseases, while maintaining the quality across the value chain. What also helped was the use of resilient-specific, pathogen-free (SPF) brood-stock imported from the US. Consequently, between fiscal 2012 and 2017, the country's shrimp production doubled. Leverage opportunities, big Indian exporters are expanding infrastructure to cater to the increasing demand for value-added products from global retail chains and restaurants. This would push up exports of value-added products significantly.

Export of marine products plays a vital role in fisheries development in India by providing employment and income to millions engaged in fishing, aquaculture, processing and allied activities. Marine products have highly health attributes. Marine products are the sea food that has been acclaimed as one of the fastest moving commodity in the world market.

OBJECTIVES OF THE STUDY

The following are the objectives of the study:

- To examine the growth of marine products export
- To know the Top Indian States of Shrimp Exports
- To study the Indian Shrimp Export Statistics
- To examine the shrimp aquaculture production
- To make an analysis of shrimp export of marine product items to other countries.

METHODOLOGY

This study is based on secondary data. The required data were gathered from the records of Marine Products Export Development Authority [MPEDA] under the Ministry of Commerce and Industry at Thoothukudi. The data was also collected from standard books, magazines, related research report and web sites. The export performances of marine product have been analyzed with the help of linear trend analysis by the method of least squares.

SHRIMP AQUACULTURE PRODUCTION

Shrimp production through aquaculture has been increasing consistently over the last 8 years. Shrimp aquaculture production, mainly comprising of two species of Shrimp and one species of freshwater prawn.

Tiger Shrimp:

Table 1
State wise production details of Tiger shrimp in 2015 - 2016

S.No	State	Area Utilised (ha)	Production (Mt)	Productivity (Mt/ha/year)
1.	West Bengal	50593	61998	1.23
2.	Odisha	4552	9191	2.01
3.	Andhra Pradesh	2637	3739	1.41
4.	Tamil Nadu	409	1103	2.07
5.	Kerala	8306	3490	0.42
6.	Karnataka & Goa	1948	682	0.35
7.	Maharashtra	3	6	2.00
8.	Gujarat	398	1243	3.12
	Total	68846	81452	1.18

Source: Statistics of EMPEDA in 2016

Table 2
Comparison between the productions of Tiger shrimp in 2015 - 2016

Year	Live Weight (Mt)	Product Weight (Mt)	Estimated Value (Crores)
2014 -2015	73,155	43,890	3,519.00
2015 -2016	81,485	48,871	2,898.00
Increase/ Decrease	(+) 8297	(+) 4,981	(-) 621.00
Difference	(+) 11.34%	(+) 11.34%	(-) 17.64%

Source: Statistics of EMPEDA in 2016

During the year 2015 -2016 the tiger shrimp production reported was 81,452 MT, about 765 (61998 MT) of which was reported from the West Bengal, followed by Odisha (2.01%), Andhra Pradesh (1.41%), Kerala (0.42%) and Gujarat (3.12%). The state wise details of area utilized for culture and production during the year 2015 – 2016 is given in table 1.

A comparison with the production of tiger shrimp during the year 2015 -16 indicates that the production has increased by about 11.34%.

Table 3

State wise production details of Tiger shrimp in 2015 – 2016

AUC: Area UNDER Culture (ha) EP: Export Production (Mt)

S.No	State		2010- 2011	2011- 2012	2012- 2013	2013- 2014	2014- 2015	2016- 2017
1.	West Bengal	AUC	47588	48558	48410	48730	48848	50593
		EP	40725	45999	52581	53049	53526	61998
2.	Odisha	AUC	5324	8597	6256	5523	5392	4552
		EP	7520	10901	14096	11075	10075	9191
3.	Andhra Pradesh	AUC	42055	35274	15020	2522	2190	2637
		EP	49030	51081	25948	2883	2962	3739
4.	Tamil Nadu & Pondicherry	AUC	2281	5360	6293	343	37	409
		EP	4020	12097	17220	916	73	1103
5.	Kerala	AUC	11788	12809	12916	12719	13230	8306
		EP	8075	8138	5175	3360	3643	3490
6.	Karnataka	AUC	1715	650	240	94	688	1948
		EP	2090	609	120	56	498	682
7.	Goa	AUC	306	53	29	53	6	0
		EP	320	51	47	14	16	0
8.	Maharashtra	AUC	830	1098	1046	817	126	3
		EP	1120	1721	2009	1083	177	6
9.	Gujarat	AUC	1966	1971	1992	1375	880	398
		EP	5675	4869	6044	4362	2183	1243
	Total	AUC	113853	114370	93110	72177	71400	68846
		EP	118575	135466	123302	76798	73155	81452

Source: Statistics of EMPEDA in 2016

Table 3 gives the trend in the area utilization and production of Tiger shrimp in various maritime states of the country. The figure indicates that there was increase in the production of the section in West Bengal, Andhra Pradesh, Tamil Nadu and Karnataka. In Odisha and Kerala, where it showed a sustained production.

PACIFIC WHITE SHRIMP (VANNAMEI)

The increasing growth trend for the pacific white shrimp aquaculture is continuing to be maintained during the last consecutive seven years, since its introduction into the country. The trend has propelled the expansion of Vannamei culture in the country. Andhra Pradesh being the hub of scientific aquaculture, the exponential increase in production of Vannamei.

Table 4
State wise production details of Tiger Vannamei in 2015 - 2016

S.No	State	Area Utilised (ha)	Production (Mt)	Productivity (Mt/ha/year)
1.	West Bengal	1387	6776	4.89
2.	Odisha	4439	19241	4.33
3.	Andhra Pradesh	39800	295332	7.42
4.	Tamil Nadu	7615	44453	5.83
5.	Kerala	22	74	3.36
6.	Karnataka & Goa	343	1078	3.14
7.	Maharashtra	1356	6118	4.51
8.	Gujarat	4154	32946	7.93
	Total	59116	406018	6.87

Source: Statistics of EMPEDA in 2016

Table 5

Comparison between the production details of Tiger Vannamei in 2015 - 2016

Year	Live Weight (Mt)	Product Weight (Mt)	Estimated Value (Crores)
2014 -2015	353413	212047	13,719.00
2015 -2016	406018	243611	13,154.00
Increase/ Decrease	(+) 52605	(+) 31564	(-) 565.00
Difference	(+) 14.88%	(+) 14.88%	(-) 4.11%

Source: Statistics of EMPEDA in 2016

Vannamei production in 2015 – 2016 showed an increase of 14.88% over the preceding year. The state wise details of area under culture and production of the species for the year 2015 -2016 are given in table 4. Andhra Pradesh once again led the table with a total production of 2, 95,332 MT, followed by Tamil Nadu with a production of 44,453 MT.

A comparison with the production of tiger Vannamei shrimp during the year 2015 – 2016 indicates that the production has increased by above 14.88%.

INDIAN SHRIMP EXPORT STATISTICS OF 2017

According to shrimp export data of India 2017, the highest export sales recorded in July (USD 791.22 million) and the lowest export sales recorded in the month of February (USD 175.94 million). However, in terms of quarter wise analysis, India did least shrimp exports in the first quarter of 2017 and it is highest in the third quarter of year 2017.

In quantity wise analysis of shrimp exports, 423814714 kilograms have exported by India during Q1-Q3 2017. In terms of quantity, the highest shrimp exports recorded in September and July respectively.

Table 7
Indian Shrimp Export 2016 - 2017

Month	Value	Value %
January	228.29	6.46
February	175.94	4.98
March	245.69	6.95
April	245.13	6.94
May	373.97	10.58
June	445.47	12.61
July	791.22	22.39
August	538.60	15.24
September	488.99	13.84

Source: Statistics of EMPEDA in 2016

The table 7 reveals that, month wise analysis of shrimp export from India the month of July 22.39%.

SHRIMP IS THE MAIN SEAFOOD THAT INDIA EXPORTS

Shrimp is the most demanded and most exported seafood from India in 2017. India shrimp exports covered 98.82% market for the seafood exports and 419147161 kilograms departed from India from Q1 to Q3 of 2017. Prawn and Scampi are other species that India exports and registered 1.05% and 0.13% of shrimp export value.

Table 8
Shrimp Is the Main Seafood That India Exports

Species	Value (%)	Quantity (KGS)
Shrimp	98.82	419147161
Prawn	1.05	4330943
Scampi	0.13	336610

Source: Statistics of EMPEDA in 2016

The above tables 8 indicate me different Categories of Indian Shrimp that is exported. India majorly exports headless shell on shrimp to foreign countries.

TOP COUNTRIES OF INDIAN SHRIMP IMPORT

Indian shrimp is exporting to 80 different countries across the world. Indian seafood exports found its largest market the United States followed by Vietnam, Japan, United Kingdom and United Arab Emirates. India shrimp exports to USA stood at USD 1614.75 million with the total quantity of 166269926 kilograms during the period of Jan-Sept 2017. India has supplied 45% of the shrimp shipments to United States only. As per shrimp export data, India shrimp exports to Vietnam recorded USD 836.43 million with the quantity of 120445423 kilograms.

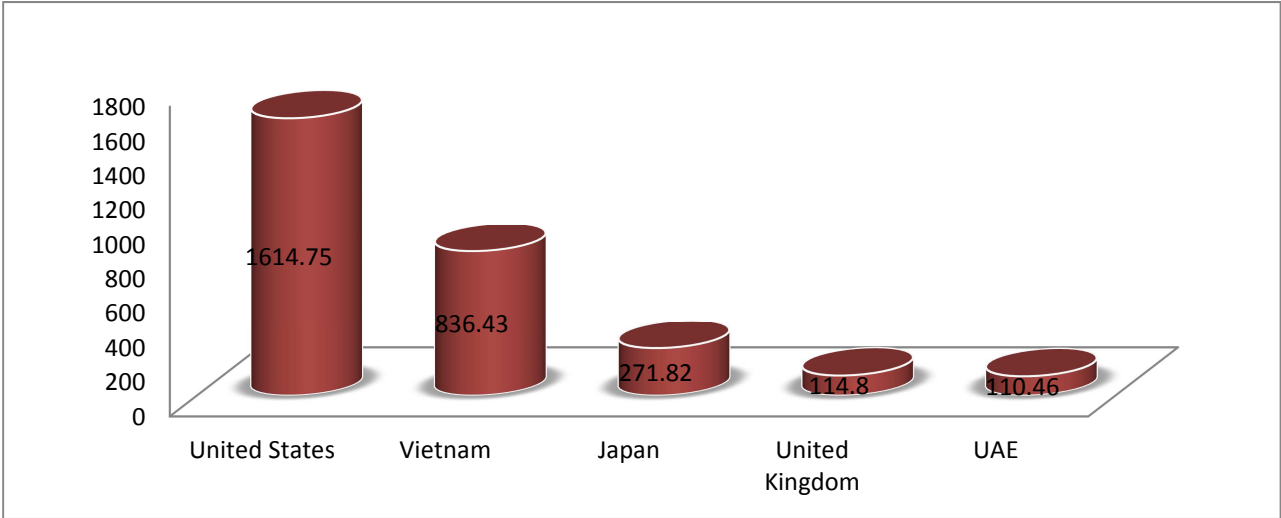
Table 9
Top countries of Indian shrimp

Countries	Value (USD Million)	Quantity (KGS)
United States	1614.75	166269926
Vietnam	836.43	120445423
Japan	271.82	28335768
United Kingdom	114.80	13178137
UAE	110.46	14774072

Source: Statistics of EMPEDA in 2016

The detailed information of item wise exports in the following Figure

Figure 1 Top countries of Indian shrimp



TOP INDIAN STATES OF SHRIMP EXPORTS

Table 10
Top Indian States of Shrimp Exports

Indian States	Value (USD Million)
Andhra Pradesh	1285.33
Tamil Nadu	688.60
West Bengal	412.07
Kerala	384.60
Maharashtra	308.57

Source: Statistics of EMPEDA in 2016

The table 10 depicts that Andhra Pradesh is the largest Indian shrimp exporter state and recorded USD 1285.33 million between January and September 2017. Approximately 36% of the Indian shrimp has exported from Andhra Pradesh only. Tamil Nadu is second largest in the list of shrimp exporting states of India. A total of 74096200 kilograms of Indian shrimp with the value of USD 688.60 million is exported from Tamil Nadu during the same period.

INDIA DEPARTS MAXIMUM SHRIMP SHIPMENTS FROM VIZAG SEA

Table 11
India Departs Maximum Shrimp Shipments

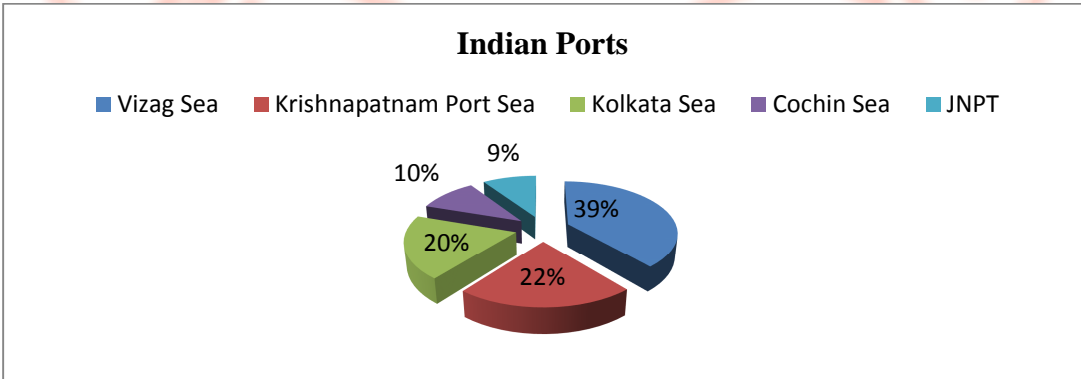
Indian Ports	Value (%)
Vizag Sea	31.13
Krishnapatnam Port Sea	17.53
Kolkata Sea	15.72
Cochin Sea	08.34
JNPT	07.53

Source: Statistics of EMPEDA in 2016

In 2017, India is exporting shrimp to its destination countries from 23 Indian ports. Vizag Sea is the biggest Indian port of shrimp exports. India has exported 31.13% of the shrimp with the value of USD 1099.93 million from this port only during Q1-Q3 2017. Vizag Sea is followed by Krishnapatnam Port Sea, Kolkata Sea, Cochin Sea and JNPT (Nhava Sheva Sea) which recorded share value of 17.53%, 15.72%, 8.34% and 7.53 respectively

The detailed information of item wise exports in the following Figure

Figure2 India Departs Maximum Shrimp Shipments



FINDINGS

- A comparison with the production of tiger shrimp during the year 2015 -16 indicates that the production has increased by about 11.34%.
- The area utilization and production of Tiger shrimp in various maritime states of the country. The figure indicates that there was increase in the production of the section in West Bengal, Andhra Pradesh, Tamil Nadu and Karnataka. In Odisha and Kerala, where it showed a sustained production.
- However, in terms of quarter wise analysis, India did least shrimp exports in the first quarter of 2017 and it is highest in the third quarter of year 2017.
- Month wise analysis of shrimp export from India in July is the highest quantity of exporting month 22.39%.
- India has supplied 45% of the shrimp shipments to United States only. As per shrimp export data, India shrimp exports to Vietnam recorded USD 836.43 million with the quantity of 120445423 kilograms.
- Andhra Pradesh is the largest Indian shrimp exporter state and recorded USD 1285.33 million between January and September 2017.

SUGGESTIONS

- Quality control measures and increase in infrastructure facilities for production of value added items help in achieving the superior market.
- Insurance coverage for the shrimp farming should be strengthening.

CONCLUSION

This study concluded that, the shrimp [in terms of Quantity] are the main marine products exported year by year. Since export of shrimp contribute largely to the Foreign exchange earnings of Government of India, all possible steps are taken for growth of shrimp production and export.

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