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IMPORT & EXPORT FISHERIES IN INDIA-CHALLENGES

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ABSTRACT

Indian marine products are wanted internationally. There is potential for a higher market share in importing countries. Shrimp contributed 62% by value and 28% by volume of exports in 2002-03. The potential market for marine exports is in value added products (cooked, ready to eat and ready for table), freeze dried shrimps (wherever reduced transportation cost can bring in competitive advantage), surimi and canned fish. While infrastructural requirements are essential in the entire supply chain, the quality of infrastructure in the pre-processing stage is significantly lower than the processing and post-processing stages.

This paper focuses on the scope analysing Import and Export trends of Fish Undustry and challenges faced by them namely...

1. Tariff Barriers
2. Regional Trading/ Preferential Blocs
3. Import Barriers
4. Non-Tariff Barriers on Imports
5. Non-Tariff Barriers on Exports
6. Competition

KEYWORDS :*Inland, Marine, fish Seed Production, challenges.*

INTRODUCTION :

The fishery is one of the importance sectors of Indian Economy, which produces large number of employments as well as foreign exchanges. Fishery sector occupies a very importance place in the socio-economic development of India. It stimulates growth of a number of subsidiary industries. This sectors plays vital role in providing nutrition to large numbers of population. Only 10 crore MT fishes are supplied where there is a need to provide 26 crore MT fishes to world population. In order to increase this supply, the maximum water sources should be utilized for fishery.

India is the second largest producer of fish in the world contributing to about 5.43% of global fish production. India is also a major producer of fish through aquaculture and ranks second in the world after china.In India, there is remarkable increase of 75% in fishery. The share of marine fisheries increased from 50 % to 71 % in 1951 to 2000 and inland fisheries went up from 29% to 50% in the same duration. It is concluded that there is scope to expand the inland fisheries.

Fish production in India has touched 5.96 million tonnes in 2001-02 from mere 0.75 million tonnes in 1950-51. The global and Indian fish production during the last 50 years is reported in Table 1.1. The share of India in global fish production has grown gradually, from about 2.6 per cent during

the 1960s and 1970s to 4.62 per cent in 2000-01. It shows that growth in fish production in India has been at a faster rate than that in the world; mainly due to increasing contributions from inland fisheries.

Table 1.1. Fish production in India and world, 1950-51 to 2001-02

Year	World (million tonnes)	India (million tonnes)	India's share (%)
1950-51	23.50	0.75	3.19
1960-61	43.60	1.16	2.66
1970-71	66.20	1.76	2.66
1980-81	72.30	2.44	3.37
1985-86	85.60	2.88	3.36
1990-91	97.97	3.84	3.92
2001-02	129.00	5.96	4.62

Source:Fisheries Statistics, 2000 FAO; Handbook on Fisheries Statistics, 2000, Ministry of Agriculture, Government of India and unpublished data from Department of Animal Husbandry and Dairying, Ministry of Agriculture, Government of India

OBJECTIVES

i) To study the challenged faced during Import & Export of Fish & related products.
ii) To study and understand various barriers & completion in Fish Industry.
iii) To study the fish production, Fish Income and Its export from India

METHODOLOGY

In the present research paper, the researcher has used secondary dada to collect the information of fisheries in India. The secondary dada includes references books, magazines, journals, daily newspapers, articles, research articles, internet and Economic Survey of India as well as World 2013-14

SCOPE AND LIMITATIONS

The fisheries and allied sector play an important role in the development of India. In order to state the varies aspect of fisheries in development of India, only secondary that are taken from the year 2000-01to 2013-14 so all the limitations of secondary dada are found in the study.

RESULT AND DISCUSSION:

To simplify the studythe discussions has been divided into sub-topics. It gives a brief introduction ofthe structure of the chapter and a comprehensive picture of the various challengesfaced by the marine fisheries (specifically marine shrimps/prawns) sector exportindustry from the international and domestic business environment. It deals with theadjustments required to adapt to the changing market conditions for the seafoodsector. It contains the views expressed in literature on industry level and interindustrylevel capabilities that foster export growth as well as a brief account ofvarious studies (based on primary data) undertaken in the past ten years on differentfacets of the Indian marine fisheries sector. In this chapter, an effort has been madeto identify the gaps in the body of literature on the subject of export competiveness of the Indian marine shrimps/prawns sector

and the concluding remarks areprovided

Challenges to be faced by Seafood Sector in the International Business Environment

The seafood products have no quantity restrictions on exports. Still there are somany challenges to get the sustainability in global market. The challenges of theinternational business environment have been described in sub- sections 5.1.1 to 5.1.5.

Tariff Barriers

It is a tax levied by the foreign government on goods imported into that country (orimport duty). The tariff increases the price at which the goods are sold in theimporting country and therefore makes them less competitive with locally producedgoods. Another important protective measure used by the importing countries is thelevy of high tariffs on imported items to protect the domestic industry. The worldwidemovement in recent years has been towards more free trade. This means thatbarriers to trade created by tariffs have been reduced (Caswell and Hooker, 1996).After the Uruguay Round (UR) it found a trade-weighted average of bound tariffs at5.2 per cent for fish and fish products, and a corresponding figure at 4.4 percent forMost Favoured Nation (MFN) applied tariffs (Finger, Ingco and Reincke, 1996). Afterthe UR, average weighted import tariffs on fish products in developed countries,were reduced to around 4.5 per cent, FAO (2003). These figures are stronglyaffected by the large share of world imports accounted for by the European Union(EU), Japan and the United States of America, and they hide that the majority ofcountries in the world in fact have much higher seafood tariffs (Melchior, 2006).

Regional Trading/ Preferential Blocs

The main challenge faced by exporting countries these days is the increasing nontariffbarriers imposed by the developed markets Non tariff barriers in the name of seafoodquality and safety are coming out every day and authorities in the importing countriesintroduce stringent measures to protect consumers, which goes back to affectingtrade indirectly. Apart from the official non-tariff barriers imposed by governments,exporters have also to deal with the increasing power of multinational retailers andgreen groups which pressure exporters with difficult "voluntary measures" in thename of sustainability and eco-labeling. Like it or not exporters are forced to complywith their requirements (Pawiro, 2009).

Import Barriers

Currently, India imposes strong barriers on the import of fisheries items. While theofficial sources feel that import should increase at least for re-export purposes,because of the over exploitation of our capture area. But the fishermen'sassociations are opposing such moves. Also the import duty for shrimps/prawnsproduct the tariff line is 30% which is quite higher with comparison to the othercountry.

Non-Tariff Barriers on Imports

In order to import fish, one requires a special import permit (SIP). This permit isgiven at an office in Delhi. In order to receive each consignment in the port, oneneeds to acquire fresh permits from Delhi. This creates immense amount of hasslesfor the importer. It also raises the possibility of corruption on the part of the officials incharge of providing such permits. It has been alleged that sometimes the permitstakes considerable time and that adds to the cost of storage of fish at the

port.MPEDA is advocating for allowing it to issue such permits. This can be useful asMPEDA has offices in various states. Therefore the entire process need not beDelhi-centric. Thus, the process can be made decentralized. However, such changesare not initiated yet (MPEDA, 2008).

Non Tariff Barriers on Exports

Non-tariff barriers to trade (NTB's) are trade barriers that restrict imports but are notin the usual form of a tariff. Common taxonomies of NTBs include market-specifictrade and domestic policies such as import quotas, voluntary export restraints,restrictive state-trading interventions, export subsidies, countervailing duties,technical barriers to trade, sanitary and phyto-sanitory (SPS) policies, rules of origin,and domestic content requirement schemes. Extended taxonomies also includemacro-policies affecting trade (Beghin, 2006). No taxonomy can be complete, asNTBs are defined as what they are not (Deardorff and Stern, 1998). The NTB issueswith Indian marine products (shrimps/prawns contributing the 57% out of the total export) exporting has given clearly in the Table-2.2.

Table 2.2: The Non Tariff Barriers India, faced in International Market (2009)

HS Code	Product	Issues	Country	Details of NTM/NTBs
30000	Fish	Standard	EC	Non harmonization of testing procedures standard leads to rejections.
30000	Fish	Standard	EC	UK rejects consignments with cholrampheniool / notrofuran residues and destroys it. Issue taken up with Food Standards Agency (FSA)
30000	Fish	Standard	EC	Rejection in Italy and France due to presence of Vibrio Parahaemolyticus, without judging the virulence factors namely capacity to produce thermo stable direct hemolysin (TDH) /thermostable related hemolysin (TRH)
30000	Fish	Standard	EC	Rejection soften Indian sea-caught marine products for the presence of bacterial inhibitors/antibiotic residues without specifying the residue through the confirmatory test. EC logic of mere presence of residue beyond threshold limit is hazardous is flawed.
30000	Fish	Standard	EC	Non-harmonization of procedure for lifting Rapid Alerts(Ex: the consecutive checks for same company exports areFrance-3,Spain-10,Belgium-5;Italy-10 etc.). Non originating EC Members do not lift rapid alert.
30000	Fish	Standard	EC	Despite harmonization of microbiological criteria under ECReg2073/2005,Members using not internationally accepted/ validated test methods .
30000	Fish	Standard	EC	Health certificates in EC language rather than English
30000	Fish	Certification	Japan	Japan's Ministry of Health , Labour and Welfare (MHLW) allow the fishery product importing to Japan on the basis of Health Certificate issued by IC/EIA instead of test report issued by an approved lab.
30000	Fish	Standards	Kuwait	Food Safety Commission of Kuwait Municipality hard tested to samples of marine products imported from India found Microbial contamination that causes cholerae. Based on that Kuwait had imposed ban on import of marine products from India with effect from 28.10.2006
30000	Fish	Standards	Norway	Pathogen analysis by NMKL method which is not accepted internationally
30000	Fish	Certification	Russia	Non recognition of EIC conformity certificates
30000	Fish	Standards	Saudi Arabia	Ban since 1984 due to India in list of WHO cholera affected countries
30000	Fish	Standard	Saudi Arabia	Fish shall comply with the 7 Saudi Standards on fish and sea products
30000	Fish	Labeling	Saudi Arabia	The label on all fish consignment shall cover all the information as per the standard no. 1/995.
30000	Fish	Certification	Saudi Arabia	Periodic visit and inspection of health procedures in fish farms and the exporting countries shall bear the cost of these visit.
30000	Fish	Anti Dumping	US	Customs bond requirements
30000	Fish	Regulations	US	Increased inspections under the Public Health Security and Bio-terrorism and Response Act of 2002 (Bioterrorism Act 02).
30000	Fish	Labelling	US	Mandatory labeling of country of origin /whether "farmraised" or "wild" for fresh fish and shellfish under the Country of Origin Labeling Programme (wef September 2004) and Public Law107-171.Punitive fines of $10000 per violation
30000	Fish	Certification	US	US has not agreed to recognition of EIC certification on account of the costs and the complications involved
30613	Shrimp	Standard	US	Random checking and FDA rejection based on criteria of Salmonella, Filth and Decomposition.

Table 2.2: The Non Tariff Barriers India, faced in International Market (2009)

1.1.1. MFN Applied Tariff

Now the tariff scenario has again changed. From Table-2.3 most of the countriesexcept EU and China having zero MFN Applied Tariff (All the tariff calculationsundertaken here are based on average of ad valorem tariff rates; i.e. tariffsexpressed as a percentage of the value of goods) for this product (HS Code030613) .

Table: 2.3 MFN Applied Tariff in India's Destinated Markets for Frozen Shrimps/ Prawns (HS 030613)

Destinated Markets' of India	MFN Applied Tariff
EU	13.2
India	30
Japan	1
China	6.2
Canada	0
UAE	0
Australia	0
Malaysia	0
USA	0
South Africa	0

Source: WTO, 2009

The above table indicats tariff is not a barrier for exporting shrimps/prawns product,because India has Free Trade Agreement (FTA) with most of the countries, exceptEU (which is one of the largest export markets for India). With EU also the India isplanning to go for FTA (Ministry of Commerce, 2009).

Anti-dumping Duty

India is faced with various tariff barriers with regards to the export of fisheries items.Barrier imposed by USA is discussed as an example. USA had imposed antidumpingduty on Indian shrimps together with continuous bond requirements. Thishad acted as a serious trade barrier. The seafood exporters association of India hadchallenged this and filed a complaint before the US CIT challenging the amendedbond directive. A meeting was later held in Geneva on 4–8 June, 2007.Subsequently since September, 2007, directive anti dumping duties have beenreduced from 10.17% to 7.22% (Rajeev, 2008 Fisheries Trade in India:Understanding Potentials and Barriers, NUPI Working Paper).

Countervailing Duty (CVDs)

CVDs are duties imposed under WTO Rules to neutralize the negative effects of other duties. They are imposed when a foreign country subsidizes its exports, hurtingdomestic producers in the importing country (Jones C. V., 2010). According to WorldTrade Organization rules, a country can launch its own investigation and decide tocharge extra duties, provided such additional duties are in accordance with theGATT Article VI and the GATT "Agreement on Subsidies and Countervailing Duties".Since countries can rule domestically whether domestic industries are in danger andwhether foreign countries subsidize the products, the institutional processsurrounding the investigation and determinations has significant impacts beyond thecountervailing duties. For example, the U.S. shrimp industry continues to beconcerned about expanding imports of certain frozen shrimp from Brazil, China,Ecuador, India, Thailand, and Vietnam for its competitive price. In 2003, theDepartment of Commerce (DOC) initiated an antidumping investigation, to find outwhether these imports were being sold into the United States below fair value or were receiving subsidies from foreign government programs. The investigationsresulted in the imposition of a countervailing duty in 2005 on importation

of shrimps/prawns Jones and Harvey, 2007),

Country of Origin Label

In 2002, U.S. had specified Country-of-origin labeling (COOL) for certain agriculturalcommodities, called "covered commodities." The term "covered commodity" isdefined as muscle cuts of beef, lamb, and pork, ground beef, ground lamb, groundpork, farm-raised fish and shellfish, wild fish and shellfish, perishable agriculturalcommodities, and peanuts. The idea originated with certain U.S. producer groupswho felt that such labeling requirements would quickly end low commodity prices.This is a traceability system, which can able (a) to protect consumers from fraud andproducers from unfair competition; (b) to facilitate and monitor trace back to enhancefood safety; and (c) to address consumerInformation gaps about food safety and quality. WTO rules do permit countries torequire country-of-origin labels, but such labels cannot be used to restrict trade. U.S.trading partners could take the view that a new labeling law is a trade barrier,especially if the law raises prices or lowers demand for imported products(Srivastava, 2003).

Competitiveness

A nation's prosperity depends on its competitiveness, which is based on theproductivity with which it produces goods and services. Sound macroeconomicpolicies and stable political and legal institutions are necessary but not sufficientconditions to ensure a prosperous economy (Katsauli, 2006). Competitiveness isrooted in a nation's microeconomic fundamentals—the sophistication of companyoperations and strategies and the quality of the microeconomic businessenvironment in which companies compete. An understanding of the microeconomic foundations of competitiveness is fundamental to national economic policy. Acompetitiveness of a sector is one which identifies and actively manages all thefacets of its competitiveness - from infrastructure to education (Prokopenko J., 2000and Barbosa, 1997). Competitiveness is relative and not absolute. It depends onshareholder and customer values, financial strength which determines the ability toact and react within the competitive environment and the potential of people andtechnology in implementing the necessary strategic changes. Technologymanagement is an integral part of competitiveness (Barbosa, 1997).Competitiveness can only be sustained if an appropriate balance is maintainedbetween these factors which can be of conflicting nature (Feurer, and Chaharbaghi,1994). Competitiveness includes both efficiency and effectiveness (Buckley, et al,(1988).

The Golden Rules of Competitiveness

Create a stable and predictable legislative environment, work on a flexible andresilient economic structure, invest in traditional and technological infrastructure,promote private savings and domestic investment, develop aggressiveness on theinternational markets (exports) as well as attractiveness for foreign direct investment,focus on quality, speed and transparency in government and administration,maintain a relationship between wage levels, productivity and taxation, preserve thesocial fabric by reducing wage disparity and strengthening the middle class, investheavily in education, especially at the secondary level, and in the life-long training ofthe labor force, balance the economies of proximity and globosity to ensuresubstantial wealth creation, while preserving the value systems that citizens desire.Countries manage their environments according to what we call the four fundamental

forces: these four dimensions shape the country's competitiveness environment.They are often the

result of tradition, history or value systems and are so deeplyrooted in the culture of a country that, in most cases, they are not clearly stated ordefined. However, there is a possibility to integrate these dimensions into an overalltheory, which is systemic. The relationships among the four axes are (Garelli S.,2003):

- Attractiveness vs. Aggressiveness
- Proximity vs. Globosity
- Assets vs. Processes
- Individual Risk Taking vs. Social Cohesiveness

ATTRACTIVENESS VS. AGGRESSIVENESS

Traditionally, competitiveness was linked to the international aggressiveness ofcountries, that is, exports and foreign direct investments, Germany, Japan, (Garelli,2003). Some nations manage their competitiveness by being attractive, e.gSingapore, Ireland through incentives (Garelli, 2003). Bangalore makes India anattractive country with software outsourcing to increase their competitiveness in theglobal economy. Bangalore's is particularly attractive because of the availability ofengineering talent with global experience (Nair et al, 2007). In aggressiveness, themotives of strategic alliance are varied but they often include market access (Hill,1997). The ways in which firms are managed and choose to compete (Walter, 2005)

PROXIMITY VS. GLOBALITY

In most cases, nations must deal with two types of coexisting economies: theeconomy of proximity and that of Globability. The economy of proximity comprises oftraditional activities; crafts, social and personal services while the economy ofGlobability is composed of companies with international operations. It assumes thatproduction not need close to the end users (Garelli 2003). In the international arena,multinational companies may enter foreign markets by acquiring a local company;seek the resources of their local partners, by joint ventures (Das &Teng, 2000).

Assets vs processes

Nations also manage their competitiveness environment by relying more heavily onassets or on processes, some nations might be rich in natural resources but are notnecessarily competitive, e.g. Brazil, Nigeria. Other nations as Singapore are poor inresources and have relied essentially on transformation processes and becomemore competitive (Garelli 2003) and one of the reason of forming alliances is eitherto obtain others resources; and (2)to retain and develop one's own resource bycombining them with others' resources(Das &Teng, 2000) Forging an alliancesenables a firm to focus on its core skills and competencies while acquiring othercomponents or capabilities it lacks in the market place (Chan et al, 1997).

Individual risk taking vs social cohesiveness

The fourth force shaping the competitiveness of a country is the distinction betweena system that promotes individual risk and the one that preserves socialcohesiveness, the Anglo-Saxon model is characterized by emphasis on risk,deregulation, privatization and the responsibility of the individual, in contrast, thecontinental European Model relies heavily on social consensus, a more egalitarianapproach to responsibilities and an extensive welfare system (Garelli, 2003), andstrategic alliance supports the risk taking of individual company decision. In 1988 forexample, the level of direct

investment abroad by American companies was three
times that of Japanese firms (Albert, 1997, p33)

CONCLUSION:

This article has served the purpose of identifying the key issues that need to beconsidered while creating the international market strategy of the Indianprawns/shrimps. Secondary sources of information/data on challenges andcapabilities have been grouped together and gaps in the literature have beenidentified to facilitate further analysis.

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