

1. INTRODUCTION

It is commonly agreed that the long term world requirements for fish products can only be met by increasing the aquaculture contribution to a stabilised level of capture fish production. Thus on a global basis, the FAO suggests that there is a reasonable expectation of aquaculture production expanding from levels of 16 million tonnes (Mt) in 1993 to around 30 million tonnes by the year 2010. The FAO cautions, however, that the service industries will have to play a more important role in environmental planning, system management, and disease monitoring and control than at present if catastrophic production crashes are to be avoided. This warning note is particularly relevant in India, where the rapid but somewhat uncontrolled growth of the shrimp farm industry has run into problems, and is forcing a general reappraisal of the need for scientific planning and management in aquaculture practice. This new awareness of the social requirement for sustainable development provides opportunities for marketing integrated management and technology transfer packages suitable for existing farms, and for the proposed new developments in the inland fishery. Canadian expertise, linked to or allied with an Indian partner, could become part of the technical restructuring required to guarantee the sustainable expansion of Indian production.

The intent of this Business Guide is to collate available data on aquaculture in India, and in doing so provide a starting point for the Canadian aquaculture service industry to assess the opportunities and develop a strategy for market entry into that region.

2. GLOBAL PERSPECTIVE

India has the second largest aquaculture industry in the world, China being rated in first place. It is useful, from a service viewpoint, to refer to the global statistics relevant to that ranking. Thus, drawing on FAO data:

- global aquaculture production is comprised of
 - 68% finfish
 - 24% molluscs
 - 8% crustaceans
- 60% of global production is from inland farms
- 80% of global aquaculture tonnage is from Asia, with China at 7 Mt and India at 1.4 Mt representing the major volume producers.
- of the global finfish production, 85% is non-carnivorous (mostly carp, but including other cyprinids, tilapia, and milkfish) and is consumed domestically. About 15% of finfish are salmonids which are cultivated for export.
- cultured shrimp production is of the order of 0.75 Mt worldwide (1994), and is almost all exported. As of 1994, the Indian contribution was 0.062 Mt.