

Executive Summary  
Study of China Seafood Market  
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For MPEDA  
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## Contents

1	Summary of the Study on China Seafood Market .....	2
2	Recommendations .....	2
2.1	Types of Recommendations.....	3
2.2	Facilitation initiatives .....	3
2.3	Selection of products for export focus to China .....	4
2.4	Awareness creation about Indian seafood in Chinese market .....	5
2.5	Use of multi-modal supply chain .....	5
3	Reports.....	6
3.1	Report 1 : China Report – Competitor Analysis and Market Opportunity.....	6
3.2	Report 2 : China Seafood - Market and Trends.....	6
3.3	Report 3 to 7 : Province wise market opportunity and import export analysis .....	6
3.4	Report 8: Certifications, Accreditations and Structural consolidation .....	7
3.5	China Seafood Companies Directory .....	7
3.6	Datasets available in the reports .....	7
4	Data sources.....	9

# 1 Summary of the Study on China Seafood Market

The Study on China Seafood Market has been conducted by nmore, Management Consultants on behalf of Marine Products Exports Development Authority.

The study covered the following major aspects

- Market opportunity analysis of seafood products under HS 03 and HS 16 at 8 digit level based on Demand supply – China country level and 5 provinces
- Competitor Analysis of 9 countries not including India, with reference to seafood exports to China under HS 03 and HS 16 at 8 digit level– China country level and 5 provinces
- Import export analysis of seafood products based on Imports and Exports under HS 03 and HS 16 at 8 digit level– China country level and 5 provinces
- Business and Marketing strategies based on consumer behaviour, trends, supply chain formats, promotional strategies, engagement with Chinese market players
- Seafood importers directory – 300 companies

## 2 Recommendations

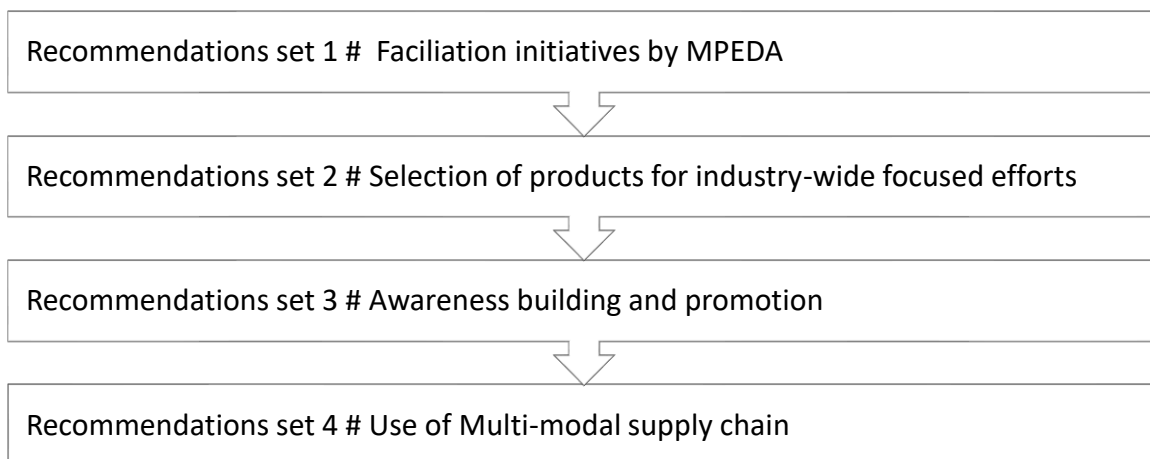
Having analysed significant amounts of data, we are of the following opinion:

1. There is a tremendous Market opportunity in India as evidenced by Import Demand in China as also Exports from immediate competitors identified for this study
2. There is also Market opportunity based on Import Demand in China of products being exported by India to other countries but not to China. With adequate Market penetration push in a set of focused products (set of 20 to 40 products having large value demand), an export upswing can definitely be achieved.
3. To facilitate Market expansion and Market penetration, Globally accepted certifications and accreditations are absolutely mandatory. MPEDA should continue their efforts in this direction and generate a sense of urgency in the exporting community to up their credentials in this regard.
4. A risk assessment and risk containment strategy needs to be developed by MPEDA with regard to concentration risks faced by part of the industry. Pre-emptory advisory from MPEDA will help companies mitigate risks arising from any single country or product.
5. To stay connected with the industry
  - a. MPEDA should engage in frequent action focused meetings with members
  - b. Create an online feedback form in vernacular as well as English to collect feedback, issues and suggestions from industry with clearly classified categories. Action taken on these should be communicated via website, social media as well as Mobile App.

## 2.1 Types of Recommendations

Recommendations based on data and information collected, collated and analysed are provided under four broad heads Viz., Facilitation by MPEDA, Selection of products for industry-wide focussed effort, Awareness building and promotion and use of multi-modal supply chain. Recommendation sets are classified into two time frames –

- Immediate and Short term: To be implemented within 1 to 2 years
- Medium and Long term: To be implemented within 3 to 5 years



## 2.2 Facilitation initiatives

- Immediate and Short Term
  - Carry out a drive to attract membership of seafood players to MPEDA (as a formal association)
  - Establish a Fisheries Inter-Institutional forum to deliberate upon Synergies for the seafood sector.
  - Establish an incubator for technology based seafood market start-ups or synergise with the existing incubator CIFT (Central Institute of Fisheries technology). This would facilitate innovation in and introduction and absorption of newer technology based marketing faster.
  - Provide services for initiation and facilitation of accreditation of individual companies as well as FFPOs and co-operatives of small seafood enterprises.
  - Provide a facility of standard page on the MPEDA site (or a sister site) to seafood companies and association who are members (at a nominal cost). This will help in directing traffic from MPEDA site. Rating of organisations based on multiple parameters should also be considered to provide a guidance to importers
  - Provide Chinese auto-translations for MPEDA website
  - Set up or facilitate the setting up of a BPO to help smaller players in handling import export enquiries (paid service)
  - Create or facilitate creation of a mobile based App for sending push notifications. This App should be powered with smart SEOs for search optimization and available on Google Play Store, IOS store and their Chinese counterparts
  - Set up India seafood store on all prominent Chinese social media platforms like Weibo, WeChat etc from where individual companies or associations can have sub-stores

- Provide monthly updates on Chinese market intelligence to Indian exporters (at a nominal cost)
- Fishery Farmer Producer Organizations are very few as compared to FPOs in other agricultural activities. Under PMMSY about 700+ FFPOs are planned to be formed. These will be headed by professional CEOs whose salary is also budgeted in the fund allocation. The fisheries sector must ensure that capacity building of these CEOs and the FFPOs includes a component on certification.
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- Medium and Long Term
  - Either set up or facilitate the setting up of an online seafood market platform
  - In the long term however, the focus must be on establishing a culture of process-oriented approach which is essential for obtaining any certification in FPOs

### 2.3 Selection of products for export focus to China

Products for Market expansion	Products for Market penetration	Products for Risk containment
<ul style="list-style-type: none"> <li>●Improvement in market share of Products which are already being exported to China from India</li> </ul>	<ul style="list-style-type: none"> <li>●Identification of products with demand in China that are being exported to other countries by India</li> <li>●Identification of products which competitor countries are exporting to China but not by India.</li> </ul>	<ul style="list-style-type: none"> <li>●Identify alternate markets for products being exported from India only to China (not included in the current project)</li> </ul>

- Immediate and Short Term
  - Create a Task Force consisting of different stakeholders in the seafood industry at the industry level
  - This Task Force should have a mandate to facilitate Indian exporters under various heads
  - Create a list of products for focussed efforts from the total set of products being imported by China categorise the products into -
    - Market share expansion
    - Market penetration
    - Market creation and development
  - Categorise existing sellers – Product-wise and Size-wise
  - Survey to identify difficulties and challenges
  - Ideate collectively to identify methods of alleviating challenges for different categories
  - Create a short list for immediate action and implement focussed efforts for Market expansion
- Medium term and Long Term

- For the list of products not being taken up for immediate focus, arrive at a list of products and steps to introduce promotional activities for Market penetration
- Create a list of products where sellers face a risk due to China concentration (a further research study would be required to arrive at these outcomes)
- Identify alternative or derivative products
- Identify new markets for these existing products

#### 2.4 Awareness creation about Indian seafood in Chinese market

- Immediate and Short Term
  - Ecommerce – industry level awareness and presence required
    - The BPO suggested under “Facilitation Initiatives” should provide processes for onboarding, store management, multi-lingual responses to import export enquiries
  - New age advertising leveraging social media
    - Create India Seafood stores in multiple social media platforms
    - Deploy influencers
    - Use Live streaming options in Online marketing
  - Establish Province level visibility and engagement with local associations
- Medium and Long Term
  - Positioning of Indian Seafood
    - Events and festivals – Repeated engagement through events, travel and online engagement is a necessity create a lasting impact on Chinese market
    - Organise online seafood events for individual provinces to gain focussed traction
  - Engage with Research Institutes and Universities in China focusing on seafood will provide access to seafood processing companies

#### 2.5 Use of multi-modal supply chain

- Immediate Term
  - Encourage and facilitate individual seafood companies or co-operatives of seafood companies to establish online presence on multiple e-commerce platforms like Alibaba, Amazon, Yonghui, etc. This will enable them to use Drop-shipping which reduces the Supply chain risk considerably for Indian exporters
  - Facilitate Tie-ups with processing companies which have international quality certifications
- Medium and Long Term
  - Tie-ups with companies having different types of store formats – ranging from online, hypermarket, supermarket and convenience stores
  - Tie-ups with retail distribution companies having Community buying format

### 3 Reports

The study involved collation and analysis of data with respect to imports, exports, markets, distribution channels, associations, research institutions, companies, competing countries, provinces etc. Following reports have been generated as a part of this study and the full reports are available on clicking on the embedded object files.

#### 3.1 Report 1 : China Report – Competitor Analysis and Market Opportunity



China-Report  
-Competitor Analysis

This report provides extensively data backed coverage of the seafood market in China. It covers

- Overview of Domestic consumption and Foreign trade in seafood
- Research on seafood
- Import Export Analysis of HS 03 and HS 16
- India's exports – comparison with set of 9 countries not including India
- Product Wise (8 digit level) Gap and Opportunity analysis

#### 3.2 Report 2 : China Seafood - Market and Trends



Chinese Seafood  
Market and Trend Ver

This report covers the following topics and market mapping and recommendations with reference to Marketing strategies

- Overview of China Seafood industry - Organisation of industry, Associations and Stakeholders
- Consumer behaviour
- Business marketing strategies
- Distribution channels during COVID 19
- Visibility building
- Multi modal supply chain
- Demand and Growth drivers, Market challenges
- E-commerce imperative

#### 3.3 Report 3 to 7 : Province wise market opportunity and import export analysis

These reports provide extensive coverage of the seafood market in the respective provinces. The basis of selection of these provinces is provided in Report 1.



China seafood  
Liaoning Ver2.0.pdf



China seafood  
Guangdong Ver2.0.pdf



China seafood  
Shandong Ver2.0.pdf



China seafood Fujian  
Ver2.0.pdf



China seafood  
Zhejiang Ver2.0.pdf

- Report 3 :Seafood Market trends: Liaoning province
- Report 4 :Seafood Market trends: Guangdong province
- Report 5 :Seafood Market trends: Shandong province
- Report 6 :Seafood Market trends: Fujian province
- Report 7 :Seafood Market trends: Zhejiang province

### 3.4 Report 8: Certifications, Accreditations and Structural consolidation



Indian Fishery  
Ecosystem, Accreditat

- The fisheries ecosystem in India is characterised by highly fragmented producing units on one hand and a disorganized logistic system on the other. Both these combine to delays in the produce reaching the end customer and increase contamination probability.
- On the flip side, we have a huge domestic market which can absorb any excess produce which may not be export worthy as per importing country standards.

### 3.5 China Seafood Companies Directory



China Seafood  
Companies Directory

- An important output of this study is collation of detailed data and information about companies engaged in seafood industry, in the form of a business directory.
- The directory covers verified and validated data ( barring phone numbers) pertaining to companies.
- Information about each company covers 25 main items

### 3.6 Datasets available in the reports

All the data files are compressed and embedded below. To access the files, please click on the object and extract to a folder.



Data files.zip

- R1: List of patents published in Jan to Jun 2021
- R1: List of universities and research institutions
- R1: China Import and Export analysis sheet – HS 03
- R1: China Import and Export analysis sheet – HS 16
- R1: China Market Opportunity analysis sheet – HS 03
- R1: China Market Opportunity analysis sheet – HS 16
- R1: GACC seafood catalog



- R1: List of companies with GACC tracking certificate
- R2: China seafood research – Universities and Institutes
- R2: China – List of seafood associations
- R2: China Influencers
- R2: China KOL Marketing agencies
- R2: China Store formats
- R3: Liaoning Competitor comparative
- R3: Liaoning : Import and Export Analysis sheet – HS 03
- R3: Liaoning : Import and Export Analysis sheet – HS 16
- R3: Liaoning Market Opportunity analysis sheet – HS 03
- R3: Liaoning Market Opportunity analysis sheet – HS 16
- R4: Guangdong Competitor comparative
- R4: Guangdong : Import and Export Analysis sheet – HS 03
- R4: Guangdong : Import and Export Analysis sheet – HS 16
- R4: Guangdong Market Opportunity analysis sheet – HS 03
- R4: Guangdong Market Opportunity analysis sheet – HS 16
- R5: Shandong Competitor comparative
- R5: Shandong : Import and Export Analysis sheet – HS 03
- R5: Shandong : Import and Export Analysis sheet – HS 16
- R5: Shandong Market Opportunity analysis sheet – HS 03
- R5: Shandong Market Opportunity analysis sheet – HS 16
- R6: Fujian Competitor comparative
- R6: Fujian : Import and Export Analysis sheet – HS 03
- R6: Fujian : Import and Export Analysis sheet – HS 16
- R6: Fujian Market Opportunity analysis sheet – HS 03
- R6: Fujian Market Opportunity analysis sheet – HS 16
- R7: Zhejiang Competitor comparative
- R7: Zhejiang : Import and Export Analysis sheet – HS 03
- R7: Zhejiang : Import and Export Analysis sheet – HS 16
- R7: Zhejiang Market Opportunity analysis sheet – HS 03
- R7: Zhejiang Market Opportunity analysis sheet – HS 16

## 4 Data sources

We have used data from the following sources for data used for analysis -

- <http://english.customs.gov.cn/> - Customs statistics China ( this is the main data source for data on imports, exports pertaining to Jan to Dec 2019, Jan to Dec 2020, Jan to Apr 2021)
- <https://tradestat.commerce.gov.in/eidb/default.asp> - Import and export Data pertaining to India vis-à-vis world
- <https://www.wipo.int/patentscope/en/> - Data relating to research and patents published by Chinese universities, companies and institutions

We have used data from the following sources for cross checking data, validation of hypothesis)

- <https://www.intracen.org/itc/market-info-tools/trade-statistics/>
- <https://oec.world/>
- <https://wits.worldbank.org/Default.aspx?lang=en>

All other data sources are listed in the Bibliography.



China study  
bibliography.xlsx