



राष्ट्रीय मात्स्यकी विकास बोर्ड  
**National Fisheries Development Board**  
पशुपालन, डेयरी एवं मत्स्यपालन विभाग  
**Department of Fisheries**



कृषि एवं किसान कल्याण मंत्रालय, भारत सरकार

**Ministry of Fisheries, Animal Husbandry & Dairying Government of India**

स्तम्भ संख्या -235, पी. वी. एन. आर. एक्सप्रेस वे, डाक- एस. वी. पी. एन. पी. ए. हैदराबाद- 500 052

Pillar No: 235, PVNR Expressway, SVPNPA Post, Hyderabad-500 052

फ़ोन/ Phone No. 040- 2400 0201; फ़ैक्स/Fax No: 040-2401 5568 वेबसाइट/website: nfdb.gov.in

**Expression of Interest (EOI)**

for

**Carry out study on current and future levels of demand for fish in India**

National Fisheries Development Board

**Department of Fisheries**

**Ministry of Fisheries, Animal Husbandry and Dairying, Government of India**

**Pillar No: 235, PVNR Expressway, SVPNPA Post, Hyderabad-500 052**

**National Fisheries Development Board**  
**Pillar No: 235, PVNR Expressway, SVPNPA Post, Hyderabad-500 052**

**INVITATION FOR EXPRESSION OF INTEREST**

National Fisheries Development Board (NFDB) invites Expression of Interest (EoI) through online application from interested Institutes/Agencies/Organizations/ Consultancies for carry out a study on Current and future levels of demand for fish in India. The EoI Document containing the details of criteria, submission requirement, objectives, scope etc. can be downloaded from the website [nfdb.gov.in](http://nfdb.gov.in)

**Last Date for Submission of EoI is 30<sup>th</sup> November 2019, 17.00 Hrs.**

For more information or any clarifications contact:  
email Id: [info.nfdb@nic.in](mailto:info.nfdb@nic.in)

Chief Executive  
National Fisheries Development Board  
Hyderabad

**Expression of Interest Document**  
**for**  
**Carry out study on current and future levels of demand for fish in India**

**1. Background:**

The National Fisheries Development Board (NFDB), Hyderabad is an autonomous organisation under the administrative control of Department of Fisheries (DOF), Ministry of Fisheries, Animal Husbandry & Dairying, Government of India. It is the executive arm of the Department and is engaged in multifarious developmental activities to accelerate the overall growth of fisheries sector.

The Department of Fisheries, Ministry of Fisheries, Animal husbandry and Dairying, GOI is vested with the task of increase in fish production by intervention of Blue Revolution for promoting fisheries sector growth across the country and other technologies are being facilitated by NFDB. With a view to matching the demand and supply and ensuring food security, GOI intends to assess the current and future levels of demand for fish over a period of 5-10 years (2025-2030) so that relevant strategies and programs can be formulated and positioned to match the demand.

**2. Objective**

Study on current and future levels of demand for fish in India.

**3. Area of Activity**

The Eligible applicant shall be Institutions, Agencies, Organizations or Consultancy which is involved earlier in the studies on all India basis and capable of carryout a study on current and future levels of demand for fish in India.

**4. EOI Processing Fees**

A non-refundable processing fee of Rs. 500/- (Five Hundred Rupees only) in the form of a Demand draft or a Pay Order drawn in favour of “National Fisheries Development Board, Hyderabad” Payable at Hyderabad has to be submitted along with the Eoi response. Applications received without or with inadequate Eoi processing fees shall be liable to get rejected. Govt. Institutions are exempted from payment of fee.

## **5. Venue & Deadline for submission of proposal**

Application, in its complete form in all respects as specified in the EoI, must be submitted to National Fisheries Development Board, Hyderabad at the address specified herein earlier. In exceptional circumstances and at its discretion, NFDB may extend the deadline for submission of proposals by issuing an amendment to be made available on the NFDB website, for such an extension.

## **6. Validity of Offer:**

The offer for EOI as per this document shall be valid for a period of Three Months initially which may be extended further if required by NFDB.

## **7. Terms of Reference:**

The detailed Terms of Reference is enclosed as **Annexure-I**

## **8. Instructions to applicants:**

The Expression of Interest is to be submitted in the manner prescribed below.

All information as detailed below is to be submitted in hard copies in sealed cover.

- a) Applicant's Expression of Interest as per Format-1 and Format-2 along with relevant Documents.
- b) Power of Attorney in favour of Authorized Signatory with the signature of Authorized person. [in case of Agencies/Organizations]

EOI Documents have been hosted on the website [nfdb.gov.in](http://nfdb.gov.in) and may be downloaded from the website.

The applicants are expected to examine all instructions, forms, terms and other details in the EoI document carefully. Failure to furnish complete information as mentioned in the EOI document or submission of a proposal not substantially responsive to the EOI documents in every respect will be at the Applicant's risk and may result in rejection of the proposal.

## **9. Criteria :**

Institutions /Organisations / Agencies / Consultancies who has experience/ involved to carry out studies on all India basis are eligible to submit EOI.

#### **10. Selection of the Applicant:**

- 1.The applicant will be selected based on verification and testimonials submitted and **Presentation to be made by the applicant** on a date to be fixed by NFDB.
2. Based on the committee report, the selected candidates shall submit “Request for Proposal” (RFP) for actual implementation of the project.
3. The decision of the committee members will be final in the selection process.

#### **11. Condition under which EOI is issued:**

The EOI is not an offer and is issued with no commitment. NFDB reserves the right to withdraw EOI and or vary any part thereof at any stage.

#### **12. Last date for submission of Eoi :**

The last date of submission of EOI is 30.11.2019 (17:00 hrs.)

**FORMAT – 1**  
**APPLICANT’S EXPRESSION OF INTEREST**

To,  
Executive Director (Technical),  
National Fisheries Development Board,  
**Pillar No: 235, PVNR Expressway, SVPNPA Post,**  
**Hyderabad-500 052**

**Sub:** Submission of Expression of Interest (Eoi) for carry out study on current and future levels of demand for fish in India.

Dear Sir/Madam,

In response to the Invitation for Expressions of Interest (Eoi) published on \_\_\_\_\_ for the above purpose, we would like to express interest to the above proposed task. As instructed, we are submitting the Application as per Format-2 with relevant documents in sealed envelopes for needful .

Sincerely Yours,

Signature of the applicant  
[Full name of applicant]

Date:  
Encl.: As above.

**FORMAT – 2**

**Study on current and future levels of demand for fish in India**

Sl.No. (1)	Particulars sought from the applicant (2)	Particulars furnished by the applicant (3)
1	Name of the applicant (IN BLOCK LETTERS):	
2.0	Name of Institution /Organisation / Agency / Consultancy	
2.1	Year of Establishment	
2.2	Type of Institution ( attach a copy of registration certificate)	
2.3	Address with telephone No.	
2.4	Name of the authorised Contact person with mobile No. and Email address	
2.5	Particulars of GST and PAN, if any	
3	Details of research/ consultancy activities	
4	Details of studies carried out on all India basis	

**Declaration of Applicant:**

This is to certify that, I/we ..... son/daughter of .....hereby declare that the information furnished above is true to my knowledge and belief and all relevant documents are enclosed.

Date:  
Place:

Signature:

**TERMS OF REFERENCE****Study on current and future levels of demand for fish in India****1.0 Context**

Fish and its products constitute significant space in the food across the globe. Driven by rising fish eating population, growing economy, increasing disposable incomes increasing urbanization and changing tastes and preferences, increasing awareness on the health benefits of fishes, growth of the organized food retail market, the demand for fish and fishery products is increasing in both domestic and export markets over a period of time. This has necessitated producing enough to meet its growing demand. The government of India and state governments /UTs have laid emphasis on increasing fish production and are implementing several schemes aimed at not only increasing fish availability but also enhancing consumers' propensity to consume. As a result, there has been a significant progress in terms of fish production and productivity and exports during last 5 years.

It is important to understand the current supply and demand of fish which considerably vary across different regions of the country for reasons of dynamic food habits and changed preference for different varieties of fish. Available projections of demand and supply for the fish sector are limited by their high degree of aggregation and lack of empirical basis for the underlying elasticities of supply and demand. Estimates of domestic demand for fish for the next decade, i.e., 2025 and 2030 are essential for proper policy interventions, resource planning, and bench marking and setting the targets. This calls for undertaking empirical study by way of building econometric models to scientifically estimate current domestic and international demand for fish and provide realistic future demand projections considering all the important drivers.

The Department of Fisheries, Ministry of Fisheries, Animal husbandry and Dairying, GOI is vested with the task of increase in fish production by intervention of Blue Revolution for promoting fisheries sector growth across the country and other technologies are being facilitated by NFDB. With a view to matching the demand and supply and ensuring food security, the Board intends to assess the current and future levels of demand for fish over a period of 5-10 years (2025-2030) so that relevant strategies and programs can be formulated and positioned to match the demand.

The study is intended to arrive at the current and future levels of demand of fish in India. More specifically, the study has the following

**2.0 Broad objectives:**

1. Assess the current level demand for fish in the country with specific choice/demand for species and varieties
2. Estimate the projected demand for fish for next one decade, i.e, by 2025 and 2030.
3. Assess the present level of demand for export of fish of different varieties, trends and destinations



4. Estimate the projected trends in demand for export of fish and various varieties by the countries

### 3.0 Scope of Work

#### 3.1 The study has to focus on the following aspects:

1. The per capita consumption of fish has been continuously increasing over a period of time. Increasing population with changing food habits, consumption of fish continue to grow.
2. The organised food retail market is expected to increase the accessibility of processed fish results in more demand.
3. India is currently one of the leading exporters of frozen shrimp and frozen fish in various International markets which tend to grow in future as well.
4. Evolve appropriate econometric model to project future domestic and export demand for fish and fish products, and empirically validate the model.

#### 4.0 The **Terms of Reference** for the study will be to:

##### 4.1 In respect of **domestic consumption / demand**

- 1) Study and analyze the trend in per capita consumption and demand for fish in recent five years across the country in terms of varieties, regions, rural, semi urban and urban areas; and economic strata with focus on consumer preference
- 2) Study of demand cycle with reference to seasons (lean and peak seasons of year)
- 3) Study and understand the consumers' expectations in respect of quality, quantity, timely availability of fish across the spectrum
- 4) Study the trends in prices of different varieties of fish in different regions with reference to varieties/ species
- 5) Assess the potential demand in the next five/ten years period among consumers in different regions for different species
- 6) Explore and identify trends in consumer preferences and choices for fish varieties to understand shifts in consumption pattern
- 7) Study and review present and emerging marketing systems at different points such as rural, semi urban, urban, metro cities and analyze trends in demand for fish

##### 4.2 In respect of **export market demand**

- 1) Study the recent trends in export of fish in demand including a study of variety wise and destination wise exports over a period of five years
- 2) Review and explore international consumer preferences and resultant demands for specific variety of fish including export price trends
- 3) Study the demand trends for Indian frozen fish, frozen shrimp and other sea foods in the global markets
- 4) Identify challenges and scope for increased exports
- 5) Study and review major importing countries, and trends in their import

- 6) Study export prices for Indian fish and its products *vis a vis* other competitors and identify India's edge over other exporters in global markets for fish and trends in Indian share in export markets
- 7) Study and review the present policy frame in respect of export of fish including a study of incentives that have potential for boosting of export of specific fish variety/ product

Based on the above study (both domestic and international demand trends), the consultant should

- i) Estimate demand for domestic and export of fish over the next decade - variety wise, country wise
- ii) Suggest suitable strategies, policies and programs to be taken up to meet the future demand for fish both in domestic and export markets
- iii) Suggest incentives, sops, concessions, and other monetary and non monetary measures for production, value addition, domestic marketing and export of fish

### **5.0 Time frame and Deliverables**

The study will have to be completed within 90 days after award of work

- The **Draft Report** on the study in two copies along with a soft copy should be submitted **within three months** of commencement of the study
- The consultant shall make a **presentation of the draft report** to the National Fisheries Development Board
- **Final Report** along with data /information accessed/ generated during the course of the study shall be submitted **within two weeks** of approval of the study findings by the NFDB