From Gujarat's Farms to Forks in the West

Tracing the Shrimp Global Commodity Chain

CENTRE FOR LABOUR RESEARCH AND ACTION

SUPPORTED BY ROSA LUXEMBURG STIFTUNG

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The study is borne out of collective labour and collaborative efforts. The faults, however, if any, solely belong to the author.

Anamika Singh
December 2025

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CLRA

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Summary

This report attempts to trace the global commodity chain of farmed shrimp from production sites in Surat in South Gujarat to consumer markets in Europe, the US, and East Asia. It examines how power, profits, risks, and responsibilities are distributed across the chain, with particular attention to labour conditions, traceability, and ecological dimensions. Shrimp has emerged as India's most valuable seafood export, accounting for nearly 70% of seafood export earnings, with around 95% of farmed shrimp produced for export. Driven by rising demand in high-income markets which wild-capture fisheries are not able to fulfil, shrimp farming expanded rapidly under neoliberal economic reforms and export-oriented policies. India is now the second-largest global shrimp exporter, with Gujarat emerging as a significant production region, though less studied than Andhra Pradesh, which dominates the export market.

Shrimp farming in Gujarat is concentrated in Surat, Valsad, Navsari, and Bharuch, largely on brackish coastal lands. While the sector is portrayed as dispersed with small-scale farms operating in the region, production seems to be highly consolidated, with the top ten farmer groups reportedly controlling 80–90% of output, as farming operations are mostly practised under corporate and satellite farming models. The supply chain spans multiple nodes: broodstock centres → hatcheries → farms → commission agents → processors/exporters → foreign importers/distributors → retailers and food service outlets. While farms appear fragmented, processing and export are dominated by a small number of vertically integrated firms, many of which control feed and other raw material supply and satellite farming arrangements.

International buyers and distributors, primarily in the Global North, seem to exert significant influence over prices, quality standards, certification requirements, and delivery timelines. Risks related to disease, price volatility, tariffs, and crop failure are largely borne by farmers and, consequently, workers, while profits are increasingly consolidated and stable at the importing end of the chain.

Although traceability initiatives and certifications (ASC, BAP, HACCP, BRC) have expanded, they remain buyer-driven and compliance-focused, largely excluding farm-level labour conditions. Mandatory due diligence laws in the EU and Germany increase scrutiny but do not fundamentally address structural power asymmetries in the chain, given the lack of organisation amongst workers at each level of the chain.

Thus, the report exhibits how shrimp production in Gujarat is not an isolated localized/regional activity but a deeply embedded node in a global system of accumulation, where low-cost labour, externalisation of ecological costs, and opaque subcontracting sustain affordable seafood consumption in the Global North.

Background and Introduction

The push within Western nations to move from red meat to healthier alternatives such as fish and fishery products drove the emergence of aquaculture, as demand surged and natural capture marine yields proved insufficient to cater to this demand. Shrimp is predominantly produced through intensive farming in Asia and Latin America and consumed in high-income markets in Europe, North America, and Japan. India, Indonesia, Thailand, and Vietnam are key suppliers to the US and Japan, while Europe majorly sources shrimp from Latin America and Asia (Paul, 2024). In 2022, aquaculture production surpassed that of capture fisheries. China dominated aquaculture production, followed by Indonesia, India, Vietnam, and Bangladesh (Infofish, 2024). India is the second-largest exporter worldwide, after Ecuador. Shrimp exports to the US formed around 42 per cent of the total shrimp exports from India in 2023–24 and around 35 per cent in 2024–25 (Das, 2025). This was followed by China at 20.8 per cent, the European Union at 12.5 per cent, Southeast Asia at 7.3 per cent, Japan at 5 per cent, and the Middle East at 4 per cent (Rajani & Balasubramanian, 2025).

Marine wild shrimp production in India has been reported to have begun stagnating since the 1980s, which also coincided with the advent of capitalistic fishing technologies and modalities that disrupted conservation measures traditionally followed by artisanal fishers. In response to the growing demand for shrimp in Western nations, the government decided to focus on brackish water shrimp farming in the 1980s, a process that further escalated with the economic policies of the 1990s. Shrimp farming initially grew rapidly in the southern states of Andhra Pradesh and Tamil Nadu. The Blue Revolution push of the 1980s and 1990s led to the exponential growth of shrimp farms along the Indian coastline (Sundararaj and Krishnan, 2005, cited in Vadher and Manoj, 2010). Currently, shrimp is farmed on about 1,76,000 hectares of land across India, of which 91 per cent is used for the cultivation of Pacific white shrimp (*Litopenaeus vannamei*) and 8 per cent for Black Tiger shrimp (*Penaeus monodon*) culture (Rajani & Balasubramanian, 2025). Andhra Pradesh, Odisha, West Bengal, Gujarat, and Tamil Nadu drive shrimp cultivation and processing in India. In Gujarat, which has a 2,300-kilometre-long coastline, the sector began taking shape in the early 2000s. With vast stretches of brackish water areas (approximately 3.76 lakh hectares), the sector has grown steadily in the state. Shrimp farming is predominantly present in South Gujarat, particularly in the districts of Surat, Valsad, Navsari, and Bharuch. Additionally, the Saurashtra region and Diu have also seen the emergence of shrimp farms in the first decade of the new millennium.

As with most export-oriented industries, the growth of Indian shrimp exports is driven by low-cost production and corporate and government investments in the sector. These low costs are largely achieved through low wages and the discounting of ecological costs. Traceability remains a major challenge in the shrimp industry, allowing unethical practices to go unchecked. Domestically, the sector is dominated by a few large companies that shape the conditions of production. These domestic entities are, in turn, influenced by the requirements of international buyers and foreign market demands, predominantly from the Global North, rather than domestic needs.

Producing nations thus function merely as a single node in the geography of shrimp production (Marit, 2025). Consequently, the entire chain needs to be examined to identify how power, capital, resources, and exploitation flow along the supply chain. Recent abuses highlighted in processing companies in Andhra Pradesh by investigators have led to enhanced scrutiny of the sector by rights-based organisations, warranting further studies into other nodes, especially the lower tiers, of the supply chain and other shrimp-producing regions in India.

Rationale for the Study

This study attempts to analyse the shrimp supply chain between a specific production region in India, Gujarat, and target markets in Europe and the US. With globalisation and the spread of production networks, corporations increasingly seek regions where low-cost production enables greater profit accumulation for shareholders at the top of the chain. Complex supply chains are created, allowing labour exploitation and resource extraction to continue with little accountability. Production countries, mostly located in the Global South, compete with one another for export contracts from major brands in Western nations, triggering a 'race to the bottom' under pressure from global corporations. GRAIN (2017) highlights how transnational corporations often set the terms of exchange within global supply chains, including quality, prices, quantities, and deadlines, while working conditions, safety, and environmental management are left to supplying entities. The global shrimp supply chain operates under a similar configuration.

This report attempts to understand how multiple actors along the chain – multinational corporations and international buyers, domestic exporters, farm owners, agents, and workers at various levels shape labour relations. As supply chains become increasingly spatially fragmented across the globe, working conditions are shaped not only by local dynamics but also by international sourcing practices and market pressures. It has been suggested that employing 'methodological nationalism' and falling into the 'territorial trap' prevents an understanding of these global dynamics by viewing the state as the only meaningful political and economic actor (Marit, 2025).

While proponents of shrimp farming and aquaculture often highlight the sector's contribution to employment generation and infrastructure development in coastal communities, this study attempts to unpack these claims by analysing how global linkages and local dynamics drive transformations in labour relations, including the preference for deploying migrant workers over the local population.

This research draws on learnings from similar studies conducted on fisheries and aquaculture supply chains in Andhra Pradesh and other global initiatives such as *Just Seafood* – a collective of researchers working to identify sustainability challenges in global fisheries governance (Just Seafood, 2019). Such studies attempt to trace the path of a product from the site of production, through the processing and marketing stages, to its end use.

India is one of the world's largest exporters of shrimp. The key importing nation for farmed shrimp is the US. Andhra Pradesh is the largest exporting state, accounting for 70 per cent of total exports, followed by West Bengal and Gujarat. While the possibility of profit accumulation makes the sector attractive for private companies, the motivations of local landowners also need to be unpacked. Further, the promise of job creation in local areas must be interrogated, given that migrant workers are typically hired for pond preparation and maintenance, feeding and monitoring of seed, and, in some cases, even harvesting and processing.

The objective of this study is to understand the linkages between the availability of seafood, specifically shrimp, for consumers in wealth-accumulating Western nations and the precarious working conditions and ecological destruction in producing nations, particularly in South and Southeast Asia, from where both labour and resources are extracted. The study also seeks to examine how large corporations, especially those based in Western nations, use their power to shape supply chains not by improving conditions, but by ensuring that the maximum share of profits is retained at the upper tiers of the chain, and how this process is linked to conditions faced by workers at the lower tiers (Selwyn, 2019; Luig, 2019).

Through this study, CLRA attempts to trace how shrimp moves along the supply chain — from farms in Gujarat to markets in the West. Given its high export value, shrimp farming is considered highly profitable, making it important to understand how profits flow along the supply chain. The report also reflects on the effects of political economy on shrimp traceability and the consolidation of margins at the top of transnational supply chains. This study is accompanied by another CLRA study on the working and living conditions of shrimp farm workers in Surat, the main shrimp-producing district in Gujarat, which documents the precarious nature of work arrangements that bind farm-level workers to the global shrimp commodity chain.

The following chapters shed light on the discourse around traceability within the supply chain, approach and methodology employed for this study, understanding the global shrimp commodity and chain, India's shrimp exports, shrimp exports from Gujarat, financial flow and profit accumulation, labour and social relations, ecological dimensions, and key demands and way forward.

Traceability within Aquaculture

Traceability is an important aspect when it comes to commodities such as shrimp that are produced for human consumption. The aquaculture supply chain involves various nodes, making it challenging, yet necessary, to trace the source of the product (Paul, 2024). Traceability of seafood supply chains has been a point of focus because of the critical importance of food safety. Further, over the years, there has been increased scrutiny of the chain due to reports of significant ecological and social violations. This has become further complicated with the emergence of aquaculture, as the critical players and sites of production have undergone a shift. This shift has resulted in new social and ecological risks and violations, leading to the emergence of traceability initiatives across government, private, and NGO spheres (Lewis and Boyle, 2017).

Initiatives such as IBM Food Trust in countries like Norway and Ecuador highlight the potential of digital technologies in enhancing traceability. In such systems, each shrimp is assigned an identifier through blockchain, enabling stakeholders to follow the full journey of the shrimp through the supply chain. However, challenges persist, especially at the level of small-scale farmers in Asia, where the dispersion of hatcheries, farms, and processors complicates the implementation of comprehensive traceability systems.

While nutritional parameters and environmental sustainability have garnered greater attention in traceability discourses, labour and human rights violations are still catching up. Traceability efforts have gained prominence in Southeast Asian nations, given the region’s export volumes and the global spotlight on forced labour, debt bondage, human trafficking, gender inequality, and child labour in the shrimp and broader aquaculture industries (Allon, 2024). A 2014 investigation by The Guardian revealed instances of slavery in the supply chains of Thai seafood sold to international retail brands. The investigation found that prawn farming entities were sourcing fishmeal from suppliers linked to fishing boats manned by enslaved workers. Following these revelations, various stakeholders came together to deliberate on global benchmarks for shrimp feed production (Kelly, 2014).

Despite the emergence of government mandates and private initiatives focused on the ‘sustainability’ of the supply chain, labour violations continue to be widespread. Aquaculture in general, and shrimp farming in particular, are embedded in global supply chains, making them susceptible to labour abuses, as is the case with most export-led industries. With growing conversations around cleaning up supply chains and the introduction of international governance mechanisms such as the German Supply Chain Due Diligence Act and the EU Corporate Sustainability Due Diligence Directive (CSDDD), supply chain violations are increasingly being brought into the spotlight. Most recently, human rights concerns in the shrimp export industry in India have been highlighted following allegations made by a US-based human rights group. Since shrimp farming is carried out in controlled environments, the entities that control and dictate financial arrangements, prices, and species selection play a significant role in shaping labour conditions and ecological outcomes.

Approach and Methodology

This study adopts a Global Commodity Chain (GCC) approach, as it helps in understanding the international trading relations that shape the supply chain. Developed by Gereffi, the GCC framework focuses on uncovering the political economy of development and underdevelopment, as well as the power relationships that structure commodity chains. This form of analysis is particularly suited to understanding how labour dynamics are shaped within commodity production systems. It also allows for an examination of how public policies, investments, and global and local institutions influence production systems.

The chain of production reveals the key agents involved in the production, transformation, and delivery of the product. This analysis focuses on mapping the chain by identifying key actors, relationships between them, and product flows, along with associated monetary flows, based on publicly available information.

Public-domain research included reviewing Indian company websites that highlight their customers, other publicly available disclosures, and limited trade data. It should be noted that this information is not comprehensive. The investigation also involved in-depth keyword searches using search engines to identify exporting entities and their buyers in foreign territories, wherever such information was available.

Publicly available trade data, though limited, served as an important source for identifying the key countries to which shrimp was exported. Based on this, shrimp brands in Europe and the US that source from India, specifically from Gujarat, wherever granular information was available, were identified using corporate disclosures and other publicly available sources. A key limitation common to transnational supply chain studies was also present in this research, namely, the opacity and lack of traceability within supply chains and the limited availability of public information, often justified on grounds of commercial confidentiality.

Media reports, particularly from local media outlets, and online litigation records were reviewed to identify publicly reported details about operations and any violations in the region, including cases that had entered court proceedings.

Corporate records were sourced from the website of the Registrar of Companies under the Ministry of Corporate Affairs, Government of India, for entities registered as private limited companies, public limited companies, and limited liability partnerships. These records provided additional insights into corporate structures and financial operations.

Finally, the research team visited two districts in Surat, Olpad and Dumas, to gather insights into the supply chain from farm owners, workers, and locally influential actors through informal conversations.

Understanding the Global Shrimp Commodity Chain and Trade

First gaining prominence in the US in the 1980s, shrimp consumption later became popular in Spain, France, and Italy. Shrimps are crustaceans that usually inhabit salt waters in coastal regions of the tropics and subtropics, or freshwater environments. They are either wild-caught or farm-raised and comprise various species. The category that is the focus of this report is farm-raised shrimp cultivated in ponds. Farm-raising, or aquaculture, allows for year-round harvests, and farmers can alter production in terms of species and size based on market demand. Although more than 5,000 shrimp species exist, two are the primary focus of the aquaculture sector — Penaeus monodon (Black Tiger shrimp) and Litopenaeus vannamei (White leg shrimp). Industrial aquaculture operations characterised by intensive production have expanded rapidly, leading to a significant increase in the trade of farmed seafood.

Frozen warm-water shrimp is processed in various forms — head-on or head-off, tail-on or tail-off, shell-on or peeled, and deveined or non-deveined. Shrimp may be frozen raw or further processed through cooking, skewering, and/or flavouring with marinades, spices, or sauces. In the US, imported frozen raw shrimp products are largely sold through the distributor and food-service channels, while cooked shrimp products are sold to retailers and grocery chains, which then sell them to consumers. Cooked shrimp fetch a higher price than other frozen shrimp products (USITC, 2024).

For countries such as India, there is an overdependence on exports in the shrimp sector, as domestic consumption is negligible. At the same time, global demand for shrimp has stagnated at around 4 million tonnes due to economic conditions in consuming nations, leading to a decline in consumer spending. Further, given the current technologies and production conditions, failure rates in shrimp farming are estimated at around 35–40 per cent. Additionally, the sector faces problems of overproduction and excess supply in the market (Singh, 2025). These risks are largely borne by producing countries.

The key stages and actors involved in the shrimp supply chain are outlined below (van der Pijl, 2024; Aqua Culture Asia Pacific, 2022; Zeal Aqua Ltd., 2016).

Input suppliers:

Broodstock Centres (BSCs): BSCs supply shrimp larvae to hatcheries. Some broodstock centres are located in India, while shrimp larvae are also imported from the US and other countries. Over time, local BSCs have expanded as the market has grown. In addition, Broodstock Multiplication Centres (BMCs) receive Parent Post-Larvae (PPL) from overseas partners and raise them into adult broodstock.

Broodstock for Black Tiger shrimp is largely imported from:
(i) Moana Technologies, Hawaii (US), through its exclusive partner in India—Vaishnavi Aquatech, which operates BMCs in Gujarat; and
(ii) Unima, Madagascar, through its subsidiary in Tamil Nadu—Unibio Pvt. Ltd.—and partner firms including Golden Marine, BMR Industries, Vaisakhi Bio-Marine, and Sapthagiri.

Hatcheries: Hatcheries produce post-larvae (PL) using broodstock procured from BSCs and supply these seeds to coastal farms. One of the key hatcheries identified is BMR Exports, located in the Chengalpattu district, Tamil Nadu, which imports broodstock from Blue Genetics, Mexico. Another major player is Vaishnavi Aquatech, located in Andhra Pradesh. Earlier, hatcheries depended on wild-spawned post-larvae.
Farms prefer to purchase SPF (Specific Pathogen Free) shrimp seed from certified hatcheries.

Other Input Suppliers / Distributors: These entities supply feed (such as soybean meal), medicines, and equipment to farmers. Avanti Feeds is the largest feed supplier in India, with an estimated market share of around 50 per cent. Other major players include CP Group and Devi Sea Foods. It has been reported that five companies together control approximately 80–85 per cent of the feed market. Some suppliers sell inputs to farmers on long-term credit, effectively pre-financing the production cycle.

Shrimp Farmers: Shrimp farms cultivate shrimp until harvest through largely manual processes of rearing and harvesting. There are an estimated 100,000 shrimp farms in India. These farms may be independently owned, corporate-owned or leased, and some independent farmers also engage in contract farming.
Ponds are typically around 1 hectare in size, rectangular or square in shape, and approximately 1.5 to 2 metres deep. Site selection is generally based on access to water sources. Stocking density ranges between 20 and 40 post-larvae per square metre.

Although the work is not considered highly labour-intensive, 24/7 labour presence is required throughout the production season. The production process includes pond preparation, such as cleaning, ploughing, levelling, and setting up biosecurity measures, followed by water filling through pumping from local creeks into reservoirs. Water treatment involves filtration and maintaining appropriate pH levels, salinity, and chlorination. Probiotics and minerals are added to enhance water quality, and aeration systems are installed to maintain oxygen levels. Stocking is carried out using Hapa boats, followed by feed management, water monitoring, and sample testing.

Shrimp are generally fed manually from pond dykes or small boats four to six times a day, depending on the growth stage, although some farmers have invested in automated feeding equipment. Workers monitor growth, survival rates, and feed conversion ratios (FCR). Biosecurity measures include fencing of farms and ponds, bird netting using threads, crab fencing, and hand and foot dips.

Stocking typically begins in late February or early March. Shrimp are raised to 20–30 counts per kilogram before harvesting, though some farmers continue to grow shrimp to below 15 counts to fetch higher prices. Early harvests begin around 120 days, usually in July, while larger shrimp reach the market between September and November. Some farmers also conduct partial harvests, initially harvesting at 20–30 counts and subsequently at around 15 counts.

Harvesting is carried out using cast nets or by trapping shrimp at water outlets, followed by sludge disposal. Shrimp are weighed and sold to processing units. For the remainder of the year, ponds are left to dry, making shrimp farming a form of seasonal employment.

To meet EU and US regulatory requirements, MPEDA has introduced a voluntary farm registration system that provides access to a Pre-Harvest Testing System for registered farms. Processors exporting to the EU are permitted to source shrimp only from farms that have access to this system. Farmers are required to submit documentation to MPEDA to establish ownership and the legality of farms, including proof that there is no encroachment on government or forest land.

Commission Agents/Middlemen: In approximately 75–85 per cent of cases, agents or middlemen are involved in shrimp sales, particularly when sourcing from independent farmers. These agents procure shrimp from farms, aggregate quantities, and supply them to processing plants, often managing logistics as well. On harvest days, agents arrive at farms with trucks and ice boxes for procurement. They determine shrimp counts and negotiate prices accordingly.

Middlemen typically pay farmers immediately or within short credit periods. Agents may also finance the purchase of raw materials by providing credit to farmers and then recovering costs through shrimp procurement. Processors, in contrast, often have longer credit arrangements with middlemen.

In recent years, aquatech companies such as AquaConnect and AquaExchange have entered the market as intermediaries by offering digital farm management services and enabling farmers to sell their harvest through online platforms.

Processors and Exporters: Processors sort, grade, wash, peel, devein, freeze, and package shrimp for export, and in some cases also manufacture value-added products such as shrimp papad. According to the MPEDA directory, there are approximately 100–150 processing plants in India fully dedicated to farmed shrimp. As exporters, these units are required to comply with various standards and certifications, including HACCP and EU regulations.

Many processors are vertically integrated, operating their own corporate farms from which they procure shrimp. Some also own hatcheries and feed mills, giving them significant control over the production value chain. Processors may procure shrimp partially from independent farms at the farm gate or from agents at the factory gate. Where buyer requirements are particularly stringent, processors prefer direct procurement from farms.

Processed shrimp is transported via cold-chain logistics to major ports for export.

Overseas Importers/Distributors: Overseas importers receive shrimp consignments and redistribute them to wholesalers and retailers within their countries. Buying agents, either individuals or companies, are often used to coordinate sales activities. A few large Indian companies have also invested in US-based distribution operations.

End Customers: End customers include retailers and food-service outlets that sell shrimp directly to consumers. Buyers can be broadly categorised as:
(i) re-processors or cookers who import shrimp in bulk, reprocess it domestically, and distribute it to supermarkets, wholesalers, and industry;
(ii) suppliers of frozen shrimp to supermarkets with large retail contracts, handling bulk inventories; and
(iii) wholesalers supplying the HoReCa sector (Hotels, Restaurants, and Cafés/Catering).

A Glance at India’s Shrimp Exports

India produces approximately 900,000 tonnes of shrimp annually. Between 2011 and 2023, Indian shrimp farming grew at a compound annual growth rate (CAGR) of 18 per cent, reflecting strong growth driven largely by exports. Shrimp accounts for around 70 per cent of India’s total seafood exports. It is estimated that nearly 95 per cent of the farmed shrimp produced in India is exported. Of the total seafood exports from India, valued at USD 7.38 billion or ₹60,523 crore (1.78 million metric tonnes) in 2024–25, frozen shrimp ranked highest, accounting for 66 per cent and valued at USD 4.88 billion. According to MPEDA, export-oriented aquaculture production during 2023–24 stood at 1.2 million metric tonnes, of which frozen shrimp accounted for around 66 per cent of total exports to the US. Other key markets included China, the European Union, Southeast Asia, Japan, and the Middle East (28,571 MT). Indian exporters currently hold around one-fifth of the global shrimp market share. Litopenaeus vannamei accounts for 87 per cent, or 625,475 tonnes, of total shrimp exports, with a value of USD 4.25 billion. Historically, Japan was the primary buyer of Black Tiger shrimp. In recent years, however, Indian farmers have increasingly shifted towards Black Tiger shrimp for various reasons, including Ecuador’s dominance in the Vannamei market due to lower prices. Over time, both the EU and the US have also begun sourcing Black Tiger shrimp from India (Crisil Ratings, 2025; Krishnan & Gopalakrishnan, 2025; Rajani & Balasubramanian, 2025; InfoFish, 2024).

In 2023–24, India exported shrimp worth approximately USD 4.88 billion, of which over USD 2.5 billion was exported to the US. This constituted nearly 38 per cent of total US shrimp imports, followed by Ecuador at 21 per cent, Indonesia at 17 per cent, and Vietnam at 11 per cent. China is the second-largest market, to which Headless Shell-On (HLSO) blocks are exported for value addition. The EU is India’s third-largest market. In the US, peeled shrimp is the primary product supplied to the retail segment. Certain countries, such as China and Vietnam, import Indian shrimp, undertake value addition, and re-export the products at higher prices in international markets (Rajani & Balasubramanian, 2025).

There are an estimated 100,000 shrimp farms in India, which remain fragmented with limited consolidation. In addition, there are around 350 seafood processing plants in the country, owned by approximately 250 companies, of which 100–150 are fully dedicated to shrimp processing. Andhra Pradesh remains the dominant production state, accounting for around 75–85 per cent of total production due to favourable agro-climatic and market conditions. Other coastal states such as Tamil Nadu and Gujarat also contribute significantly to India’s seafood exports (Crisil Ratings, 2025; Krishnan & Gopalakrishnan, 2025; Rajani & Balasubramanian, 2025; PTI, 2025; Mukherjee, 2025; van der Pijl, 2024; ITC data, 2024).

Although MPEDA registration is voluntary, by 2022–23 more than 78,779 farms across the country had registered with MPEDA, covering a total culture area of 191,882 hectares. Of these registered farms, over 50,000 were located in Andhra Pradesh, followed by 12,000 in West Bengal, 8,000 in Odisha, 2,500 in Tamil Nadu, and around 1,200 in Gujarat. In addition, there were 1,313 registered exporters as of October 2025.

Table.1: Export Performance during 2023-24 compared to 2022-23

Export Details	2023-24	2022-23	Change %
Quantity in Tons	17,81,602	17,35,286	2.67
Value ₹ in Crores	60,523.89	63,969.14	-5.39
US$ in Million	7,381.89	8,094.31	-8.80
Unit Value (US$/Kg)	4.14	4.66	-11.17

Table 1: India's export performance during 2023-24

Exports during the Year	Total Seafood (Qty in MT)	Value (₹ crore)	Frozen Shrimp (Qty in MT)	Value (₹ crore)
2023-24	1,781,602	60,523.89	716,004	40,013.54
2022-23	1,735,286	63,969.14	711,099	43,135.58
2021-22	1,369,264	57,586.48	728,123	42,706.04
2020-21	1,149,510	43,720.98	590,275	32,520.29
2019-20	1,289,651	46,662.85	652,253	34,152.03

(Source: Marine Products Export Development Authority (MPEDA), June 2024)

Table 2: Frozen Shrimp vs Seafood Exports

Table.3: Major item-wise exports during 2023-24

Q: QUANTITY IN METRIC TON, V: VALUE IN ` CRORES, $: US$ MILLION, UV$:US$/KG						
MAJOR EXPORT ITEM GROUPS		2022-23	2023-24	SHARE % 2023-24	(%) CHANGE 2023-24	RANK 2023-24 (IN DESCENDING ORDER)
FROZEN SHRIMP	Q:	711099	716004	40.19	0.69	1
	V:	43135.58	40013.54	66.11	-7.24	1
	$:	5481.63	4881.27	66.12	-10.95	1
	UV$:	7.71	6.82		-11.56	3

Table 3: Frozen Shrimp Exports - Quantity and Value

Chart 1: Major Market Wise Exports (Value)

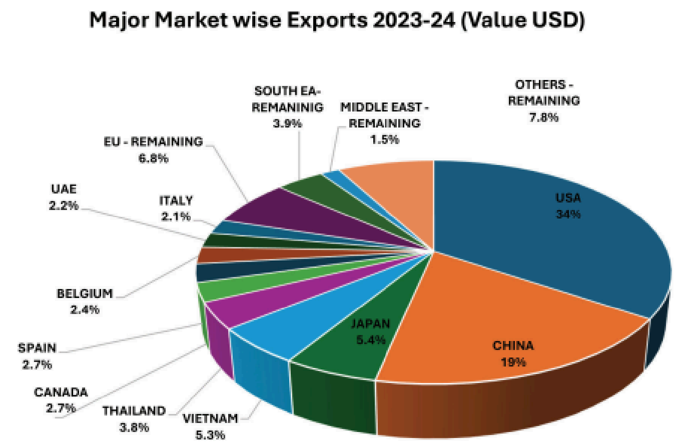


Fig.4 Major Market wise Exports 2023-24 (% share in US$)

Chart 2: Major Market Wise Exports (Quantity)

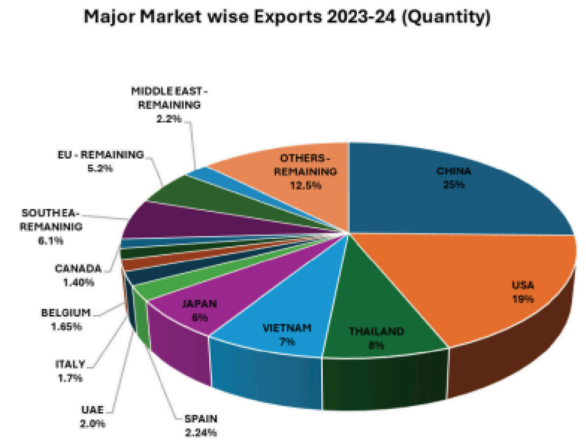


Fig.5 Major Market wise Exports 2023-24 (% share in Quantity)

India's Top Export Destinations for Frozen Shrimps and Prawns (Value in US$ Thousand)

Importers	2020	2021	2022	2023	2024
US	1,810,609	2,580,491	1,888,485	1,811,831	1,882,571
China	572,493	744,198	872,443	762,540	752,181
Japan	307,899	351,452	330,797	268,972	280,876
Vietnam	183,785	258,107	291,434	248,756	245,297
Belgium	105,576	132,409	174,176	156,700	186,798
Canada	105,278	130,111	133,264	133,092	137,752
Russia	74,159	117,345	119,578	148,949	123,351
UAE	137,689	133,925	115,696	109,223	119,645
UK	101,750	129,239	122,265	109,867	86,601
Netherlands	81,662	108,175	117,715	79,126	67,913

Source: International Trade Map

Source: India Briefing, 2025
Table 4: India's Top Export Destinations for Frozen Shrimp

TABLE 1: 19 OF INDIA'S LEADING SHRIMP COMPANIES LISTED WITH A COMPANY PROFILE, THEIR REVENUES, AND THEIR CAPACITIES

	Company verified profile	Consolidated revenue 2022-2023[1]		Capacity					
				PL production		Feed manufacturing[2]		Production	
		Self-reported	Credit rating reports	Million PL/year	Size[3]	MT/year	Size[4]	MT/year	Size[5]
AVANTI FEEDS	Yes	615	–	600	M	775,000	XL	28,000	L
DEVI SEA FOODS	Yes	391	–	200	S	300,000	L	52,000	XL
SANDHYA AQUA[6]	Yes	713	–	1,000	M	66,000	M	56,000	XL
CP GROUP[7]	No	–	544	Unknown	XL	Unknown	XL	Unknown	S
DEVI FISHERIES	Yes	318	–	200	S	47,000	S	137,500	XL
SANDHYA MARINES[8]	Yes	–	286	300	S	150,000	L	30,000	L
GROWEL GROUP	Yes	232	–	–	–	369,000	XL	28,000	L
FALCON MARINE	Yes	220	–	–	–	95,000	M	48,000	L
DEEPAK NEXGEN	Yes	217	–	220	S	520,000	XL	15,000	M
KADER EXPORTS	Yes	199	–	–	–	–	–	81,913	XL
ANANDA GROUP[9]	Yes	–	161	2,500	L	140,000	M	39,600	L
NEKKANTI SEA FOODS	Yes	139	–	100	S	–	–	79,710	XL
APEX FROZEN FOODS	Yes	130	–	1,300	L	–	–	34,240	L
BMR GROUP	Yes	94	–	9,000	XL	150,000	L	20,000	M
ROYALE MARINE IMPEX	Yes	83	–	3,000	L	60,000	M	20,000	M
VAISHNAVI AQUATECH	Yes	44	–	1,500	L	25,000	S	–	–
THE WATERBASE	Yes	37	–	500	M	110,000	M	5,000	S
ABAD OVERSEAS[10]	Yes	23	–	–	–	–	–	55,380	XL
VAISAKHI BIOS	Yes	22	–	6,000	XL	–	–	10,000	M

1 Consolidated company revenues include those of all relevant seafood-related group companies.
2 Feed manufacturing includes shrimp and fish feed manufacturing capacity to show the total size of the feed operation. In the profiles, the fish and shrimp feed capacity are split.
3 S = < 500, M = 500-1,000, L = 1,000-5,000, XL = > 5,000.
4 S = < 50,000, M = 50,000-150,000, L = 150,000-300,000, XL = > 300,000.
5 S = < 10,000, M = 10,000-20,000, L = 20,000-50,000, XL = > 50,000.
6 The numbers of Sandhya Aqua include the revenues generated by AZ Gems in the US and its subsidiaries in India.
7 The numbers of CP Group combine the reported revenues in CARE Ratings Public Credit Rating Reports for CPF (India) Pvt. Ltd. and CP Aquaculture India Pvt. Ltd. This includes revenues from its poultry business.
8 Revenue sourced from the ICRA public credit rating report of March 2023.
9 Revenue sourced from the CARE Ratings Public Credit Rating Reports of June 2022 and September 2023. The figures above combine the revenues of Ananda Aqua Exports, Ananda Foods, Ananda Enterprises India, and Godavari Mega Aqua Food Park Pvt. Ltd. The company claims that these revenues exclude $18m-$25m a year from the domestic sales of freshwater fish.
10 The self-reported numbers for Abad Overseas exclude the revenues of its parent company Abad Fisheries.

Source: Shrimp Insights, Pijl, 2024
Table 5: India's Leading Shrimp Companies

Impact of Tariffs on Indian Exporters

The overdependence on exports and deep integration into the global commodity chain make exporters and, consequently, farmers and workers, vulnerable to fluctuations in global markets and control by large foreign corporations. For Indian exporters, the highly fragmented nature of the seafood market poses significant risks, compounded by the seasonal nature of the business and regulatory risks arising from strict mandates related to production and exports. Further, output is dependent on the quality of inputs and feed, while diseases continue to pose persistent risks to the industry. It has been reported that competition remains high due to low entry barriers, leading to overproduction. Importantly, Indian seafood manufacturers face stiff competition from China and several Southeast Asian nations (CARE Ratings, 2024).

The market has recently faced additional challenges due to tariffs imposed by the US in 2025, which impacted India's annual seafood exports. Shrimp export volumes were expected to decline by 15–18 per cent following the tariff hike, which increased the total import duty to 58.26 per cent. The resultant fall in business volumes was expected to reduce exporter margins to as low as 5.0–5.5 per cent.

The impact was also felt at aquaculture farms in South Gujarat (Valsad and Surat), as well as in Andhra Pradesh, West Bengal, and Tamil Nadu. In Gujarat, it was reported that while the initial 25 per cent tariff was absorbed by buyers, the subsequent increase to 50 per cent led to the cancellation of most long-term orders, affecting exports worth over ₹300 crore. In response, the Shrimp Exporters Association of India demanded relief in the form of reductions in electricity duties and other state-level taxes and levies, the resumption of long-term financing and interest subsidies, and adequate financial support to fishermen, aquaculture farmers, and exporters through state financial institutions (IREF, 2025; ANI, 2025).

Some large companies, such as Avanti Feeds and Apex Frozen Foods, reported that certain customers were willing to absorb the 50 per cent tariff entirely to avoid market disruption during the holiday season, when shrimp demand typically rises. However, even these companies experienced cancellations from some buyers who began looking for alternative sourcing origins.

However, the overall impact of the US-imposed tariffs did not turn out to be as severe as initially anticipated. The tariffs created short-term disruption and uncertainty, particularly for farms and exporters tied to US buyers, even though aggregate export figures later recovered through market diversification. According to reports, India's shrimp export value grew by 18 per cent year-on-year to USD 2.43 billion in the first five months of 2025–26, with volumes rising by 11 per cent to 348,000 MT. This growth was driven by increased orders from Europe, Russia, and Australia, which helped offset the decline caused by US tariffs. Even before the US tariff announcement in 2024, Indian exporters had begun efforts to identify new buyers in China (Foodmate, 2024).

The increase in exports to non-US markets cushioned the impact of the tariffs. The share of non-US markets in India's shrimp exports rose from 51 per cent in the first five months of 2024–25 to 57 per cent in the corresponding period of 2025–26, indicating a shift towards more diversified global demand. China remained the largest buyer, with demand increasing by 16 per cent. Vietnam also recorded a doubling of imports, primarily sourcing shrimp from India for re-export. Demand from the European Union increased as well, particularly from Belgium, while Japan maintained stable import volumes (AngelOne, 2025; World Trade Scanner, 2025). However, it should be noted that recovery in export volumes did not necessarily translate into improved margins or working conditions, as these are structural in nature.

Governance Mechanisms and Business and Human Rights

Nature of mechanism	Mechanism / initiative	Details
Soft Laws / Voluntary frameworks	United Nations Guiding Principles on Business and Human Rights (UNGPs)	A global normative framework outlining the corporate responsibility to respect human rights through human rights due diligence (HRDD). While non-binding, the UNGPs form the foundation for mandatory due diligence laws, buyer codes of conduct, and sustainability reporting requirements.
	OECD Guidelines for Multinational Enterprises	Voluntary principles covering responsible business conduct across areas such as labour rights, environment, and supply chain due diligence. The Guidelines provide detailed due diligence guidance for global supply chains and are frequently referenced in trade, investment, and grievance mechanisms.
Hard Laws – Mandatory Due Diligence	EU Corporate Sustainability Due Diligence Directive (CSDDD)	Requires large EU and non-EU companies operating in the EU to identify, prevent, mitigate, and remediate adverse human rights and environmental impacts across their value chains. Applies to seafood imports and has extraterritorial implications for shrimp producers and exporters supplying EU markets.
	German Supply Chain Due Diligence Act (LkSG)	Mandates companies above a defined size threshold to conduct human rights and environmental due diligence across their supply chains, including risk analysis, preventive measures, grievance mechanisms, and reporting obligations. Applies indirectly to Indian shrimp exporters supplying German buyers.
	French Duty of Vigilance Law	Requires large French companies to establish and implement vigilance plans addressing human rights, health and safety, and environmental risks across subsidiaries and supply chains. Non-compliance may result in civil liability.

Nature of mechanism	Mechanism / initiative	Details
Hard Laws – Mandatory Due Diligence	Norwegian Transparency Act	Obligates large companies selling goods in Norway to conduct due diligence aligned with OECD Guidelines and to publicly disclose how they address human rights risks in their supply chains. Includes a right-to-information provision allowing stakeholders to request disclosures.
	Business Responsibility and Sustainability Reporting (BRSR – India)	Mandatory ESG reporting framework for listed Indian companies, aligned with global standards such as UNGPs and OECD Guidelines. Requires disclosure of supply chain sustainability, labour practices, and human rights risk management.
Import Controls	US Customs and Border Protection	Enforces US laws prohibiting imports produced using forced labour. CBP has the authority to detain, exclude, or seize shipments suspected of forced labour violations. CBP issues Withhold Release Orders (WROs) when there is reasonable evidence of forced labour in supply chains. Goods subject to WROs are detained at US ports unless importers can demonstrate compliance.
	EU Forced Labour Regulation	Prohibits the placement of products made with forced labour on the EU market. Authorities can investigate supply chains, withdraw products, and impose penalties, increasing due diligence expectations for seafood exporters to the EU.
	Aquaculture Stewardship Council (ASC)	Established in 2010 through collaboration among producers, NGOs, academics, and retailers. ASC standards are aligned with FAO guidelines and the ISEAL Code of Good Practice, with a focus on environmental sustainability and social responsibility.
	Best Aquaculture Practices (BAP)	Developed by the Global Seafood Alliance (1997), BAP certification covers food safety, environmental responsibility, social accountability, animal health and welfare, and traceability across the aquaculture value chain.
	FSSC 22000 (Food Safety System Certification 22000)	An internationally recognized food safety management system certification applicable to shrimp processing units, integrating ISO standards with sector-specific prerequisite programs.
	BRCGS Global Standard for Food Safety	A widely adopted retailer-driven certification emphasizing food safety, quality management systems, and operational controls in seafood processing facilities.
	Social Accountability standards (SA8000, SMETA audits)	Voluntary social compliance standards and audit protocols used to assess labour conditions, worker welfare, and ethical practices at farm and processing levels, often required by international buyers.

Nature of mechanism	Mechanism / initiative	Details
Private governance mechanisms	Buyer Codes of Conduct	Company-specific ethical and social compliance requirements imposed by international retailers and brands. Typically incorporate labour rights, health and safety, environmental standards, and audit-based monitoring, often exceeding statutory requirements in producer countries.

While these mechanisms have led to the proliferation of private auditing schemes and other ethics- and due diligence-related initiatives, even a cursory review of research emerging from production countries tells a different story. These initiatives are often buyer-driven and do not address the unequal distribution of power or the asymmetries of risk and reward along the supply chain (LeBaron, 2021). Further, due diligence initiatives and certifications are frequently limited to processing units and export-facing stages of the chain, failing to capture farm-level labour realities. Ultimately, the focus remains largely on compliance and documentation rather than on material shifts in social and environmental standards.

Institutional Landscape

- **Department of Fisheries and State Fisheries Departments –** Responsible for site selection approvals and implementation of fisheries and aquaculture policies at the state level. They also provide extension services and oversee district-level monitoring and enforcement.
- **National Fisheries Development Board (NFDB) –** An autonomous body under the Department of Fisheries, mandated to promote the sustainable and integrated development of fisheries and aquaculture through technology dissemination, capacity building, and implementation of central sector schemes.
- **Marine Products Export Development Authority (MPEDA)** – Operating under the Ministry of Commerce and Industry, MPEDA is the nodal agency for the promotion and regulation of seafood exports. It enrols exporters, prescribes quality and safety standards, conducts capacity-building programmes, and facilitates compliance with international market requirements. MPEDA oversees Good Management Practices (GMPs), farm enrollment for traceability, residue monitoring through Pre-Harvest Testing (PHT), and implementation of HACCP protocols across the production-to-processing continuum. Registration requires catch and health certificates and clearances from the Export Inspection Agency (EIA). MPEDA also mandates on-site physical verification of farm perimeters using GPS-enabled mapping to ensure traceability and compliance with export regulations.
- **Export Inspection Council (EIC)** – A statutory body under the Ministry of Commerce and Industry responsible for quality control and inspection of export commodities. Through its field agencies, EIC undertakes residue monitoring, inspection, and issuance of health certificates for seafood exports.

- **Coastal Aquaculture Authority (CAA) –** Established under the Coastal Aquaculture Authority Act, 2005, CAA regulates coastal aquaculture to ensure environmental sustainability, prevent land and water salinisation, and mandate registration of coastal aquaculture farms.
- **Coastal Management Authority –** Grants approvals for shrimp farming activities located within the Coastal Regulation Zone (CRZ), ensuring adherence to environmental safeguards and CRZ notifications.
- **Pollution Control Boards (Central and State) –** Grant consent to establish and operate aquaculture farms and processing units, and monitor compliance with environmental standards relating to effluent discharge, waste management, and water quality.
- **Directorate General of Foreign Trade (DGFT) –** Administers export–import policy and issues Import Export Codes (IECs) required for seafood exports.
- **Food Safety and Standards Authority of India (FSSAI)** – Regulates food safety and hygiene standards for seafood processing units and products intended for domestic markets.

Industry Bodies and Research Institutions

- **Seafood Exporters Association of India (SEAI)** – Represents seafood exporters and serves as a platform for policy advocacy, market intelligence, and coordination with government agencies.
- **ICAR – Central Institute for Brackish Water Aquaculture (CIBA)** – Conducts research on brackish water aquaculture systems, including shrimp breeding, health management, and sustainable production practices.
- **National Centre for Sustainable Aquaculture (NaCSA)** – An MPEDA-supported institution tasked with providing extension services, cluster-based farming support, training, and facilitation of traceability and best management practices at the farm level.
- **Rajiv Gandhi Centre for Aquaculture (RGCA)** – An autonomous body under MPEDA focusing on broodstock development, seed production, and technological support for shrimp aquaculture.
- **Aqua One Centres** – Single-window service centres promoted by MPEDA to provide farmers with access to inputs, advisory services, diagnostics, and market information.
- **Society of Aquaculture Professionals (SAP)** – A professional body facilitating knowledge exchange, technical capacity building, and dissemination of best practices.
- **Regional Aquaculture Farmers Associations** – Promote collective decision making, information sharing, and coordination among farmers at the regional level such as Surat Aquaculture Farmers Association and Gujarat Aquaculture Association.

Government Schemes and Financial Support

- **Pradhan Mantri Matsya Sampada Yojana (PMMSY) –** Launched in 2020 to support export-oriented shrimp production through assistance for pond construction, certification, branding, capacity building, and post-harvest infrastructure. Financial support is available up to rupees 7 lakh per hectare, shared equally between the central and state governments.
- **Fisheries and Aquaculture Infrastructure Development Fund (FIDF)** – Provides concessional finance for infrastructure development and modernisation across the fisheries and aquaculture value chain.
- **Kisan Credit Card (KCC) – Fisheries Scheme** – Extends short-term credit to fisheries and aquaculture farmers for working capital requirements.
- **National Bank for Agriculture and Rural Development (NABARD) –** Provides refinance and direct lending support for aquaculture production, processing, cold-chain infrastructure, and exports.
- **Sagarmala Programme** – A port-led development initiative supporting fisheries-related infrastructure such as fishing harbours, cold storage, and logistics, thereby facilitating seafood exports.
- **Customs Duty Rationalisation** – Measures include reductions in basic customs duty on broodstock, polychaete worms, prawn and fish feed, and exemptions on select inputs used in shrimp and fish feed manufacturing, aimed at lowering production costs and improving export competitiveness.

Shrimp Exports from Gujarat

Gujarat has a 2,300-kilometre-long coastline. While it is often claimed to be a vegetarian state, seafood is consumed along the coast, and the state is also a major exporter. Gujarat reportedly has around 365,000 ha of land suitable for brackish water aquaculture. As per recent reports, only about 2% of Gujarat’s brackish water area is currently being used for shrimp farming, signifying that the sector has the potential to expand rapidly. Another report indicates that shrimp farming in the state is spread over 12,000 hectares of land and produces around 50,000 tonnes of shrimp annually, valued at approximately Rs 2,500 crore (Yadav, 2025).

In Gujarat, shrimp farming is mainly concentrated in four districts in South Gujarat — Surat, Navsari, Valsad, and Bharuch, which together contribute around 90% of the state’s shrimp production. As per the website of the Coastal Aquaculture Authority, there are 1,197 registered farms in the state, with the highest numbers in Surat (400) and Valsad (356). For the 400 farms in Surat, the Water Spread Area (WSA) is indicated to be 1,066 ha. The average WSA is 2.66 ha, which translates to around two to three ponds per farm. Most of the key processing and export companies are also headquartered in the Surat district. As the Tapi and Purna rivers flow into the Gulf of Cambay, the geography provides access to saline water for farms in the region, making it well-suited for both Vannamei and Black Tiger shrimp.

Land use in the region has undergone a significant transformation, with brackish and salt-affected coastal lands being converted into shrimp farms. This shift has been driven by private investment and supportive state processes, as land classified as “barren” began to be leased out to entrepreneurs with access to capital. In Surat, Dr Manoj Sharma is widely credited with training and supporting farmers to invest in shrimp farming during the 1990s and early 2000s. Media accounts suggest that Sharma, who migrated from Maharashtra, received local support, particularly from the Sarpanch of Dandi village in Olpad, to initiate shrimp farming in the region. He later established Mayank Aquaculture Private Limited, now one of the leading shrimp companies in South Gujarat (Gupta, 2025).

The Gujarat government facilitates land access for shrimp farming through district collectors and Jan Seva Kendras, requiring applications supported by land records and registration with the Coastal Aquaculture Authority. Aerial imagery illustrates the rapid spatial expansion of aquaculture: in 2009, the Dumas region reportedly had only 40–45 ponds, whereas by 2018, hundreds of ponds had emerged along the Mindhola Creek. Similar patterns of expansion have been observed in Olpad and Mandroi. These changes reflect not only a shift in land use, but also the consolidation of control over coastal spaces.

Figure 2 *Comparison of shrimp farming activity in Dumas in Gujarat state, in 2009, with 40 - 45 ponds (left) and in 2018, with hundreds of ponds centred along the Mindhola Creek (right).*

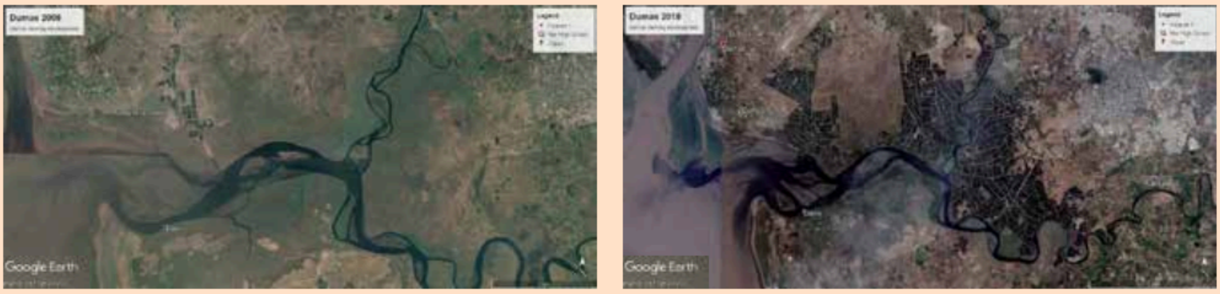


Image 1: Ariel view of shrimp farming activity in Dumas, Surat

Due to its geographic location and climatic conditions, shrimp farming in Gujarat is largely seasonal, with most farmers able to cultivate only one crop per year. Field discussions with workers and farmers in Dumas and Choryasi talukas in Surat revealed that most farms operate a single cultivation cycle, predominantly of Black Tiger shrimp. While shrimp farming in Gujarat initially began with Black Tiger in the mid-1990s, farmers shifted almost entirely to Vannamei by 2011–12 because of higher yields and faster growth. However, disease outbreaks, falling prices, and input-related risks led to renewed challenges from around 2015–16 onwards (Aqua Culture, 2019).

By 2024, more than 90% of farms in Gujarat had reportedly shifted back to Black Tiger shrimp, driven by better broodstock availability and relatively higher price realisation. Vannamei has become less attractive due to declining prices and disease-related risks (InfoFish, 2024; FAO, 2024; van der Pijl, 2024). Nevertheless, some larger operators continue to adopt a dual strategy, undertaking one long Black Tiger cycle and a shorter Vannamei cycle. SPF broodstock is largely imported from Moana Technologies (Hawaii) or Unima (Madagascar), reinforcing dependence on transnational input suppliers (LinkedIn, 2025). Gujarat's fisheries exports amount to around Rs 5,000 crore, with Europe accounting for about 40%, and the remainder going to the Gulf, China, and other Far Eastern markets (PTI, 2025).

TABLE 1: INDIA'S SHRIMP PRODUCTION PER STATE ESTIMATED BY MPEDA AND THE SAP

	MPEDA financial year 2022-2023 (MT)			SAP calendar year (MT)		
	L. vannamei	*P. monodon*	Total	2021	2022	2023
ANDHRA PRADESH	912,439	17,617	930,056	674,000	600,000	664,000
ODISHA	46,460	2,288	48,748	70,000	73,000	54,200
WEST BENGAL	46,021	24,345	70,366	88,000	61,825	50,000
GUJARAT	45,340	17,250	62,590	28,000	35,000	34,000
TAMIL NADU	39,558	65	39,623	23,000	26,500	21,618
OTHERS	7,663	1,476	9,139	17,000	41,200	8,500
UNACCOUNTED FOR*				30,000	65,000	20,000
TOTAL	**1,097,481**	**63,041**	**1,160,522**	**930,000**	**902,525**	**852,318**

Source: MPEDA annual report 2022-2023, the SAP's annual crop review 2021 and 2022, and preliminary numbers from the SAP's annual crop review 2023

* The SAP includes an "unaccounted for"-category to cover the gap between calculating a live weight equivalent of the local market and export volumes, and the volume it can allocate to each state based on member feedback.

Source: van der Pijl, 2024 – Shrimp Insights | Table 5: India's Shrimp Production per State

Although shrimp farming appears fragmented at the farm level, production in Gujarat is highly consolidated. According to Shrimp Insights, the top ten farmer groups control nearly 80–90% of total output in the state. Each group reportedly manages between 400 and 600 ha and produces 1,600–2,400 MT annually. Major players include Zeal Aqua, Mindhola Foods, Mayank Aquaculture, Vaishnavi Aquatech, and Tandels. Large operators are better positioned to absorb risk, access finance, and comply with export-oriented quality standards, while smaller farmers and workers remain more vulnerable to production failures and market volatility.

Processing capacity in Surat, though relatively recent, has expanded rapidly over the last decade. Processing firms often rely on indirect farming arrangements to secure raw material without owning land. One shrimp company in Olpad reported entering into collaboration agreements with third parties for cultivation on land allotted by the government. These agreements typically run for five years and are renewable, with collaborators operating the farms without land ownership rights.

Another major processing company described a satellite farming model, under which inputs such as feed, seed, probiotics, and other aquaculture products are supplied on credit to small farmers, with the harvested shrimp bought back by the company. Farmers participating in satellite farming are required to adhere to company-specific quality and production protocols. While this model allows firms to scale production without direct investment in farm infrastructure, it also transfers production risks onto farmers and reinforces asymmetrical power relations. Labour employed on these farms — often seasonal, informal, and drawn from marginalised caste and migrant communities remains largely invisible within certification and compliance frameworks, despite being central to sustaining export-oriented shrimp production.

Key Exporters and their foreign buyers

The website of the Export Inspection Council (EIC) lists approved units for seafood exports. As per the EIC, 110 entities in Gujarat have received approval for seafood products, including shrimp. Further, as of October 2025, 143 exporters were registered with the Veraval regional office of MPEDA and 48 with the Porbandar regional office.

While several exporters in Gujarat supply shrimp to western markets, trade in the region is dominated by a handful of companies that export primarily to the US and EU. This study focuses on three exporters identified through field visits, trade data, and farmer interviews. While direct farm-to-exporter traceability cannot be conclusively established, repeated field visits suggest similar labour and production conditions across farms in the region.

Zeal Aqua Limited

Background and ownership

Incorporated in 2009, Zeal Aqua Limited is promoted by Shantilal Ishwarlal Patel and Pradipkumar Ratilal Navik. The company began as an aquaculture and trading firm engaged in shrimp farming and dealing in shrimp seed, feed, and probiotics, and entered shrimp processing in 2017. It is listed on the Bombay Stock Exchange under the SME segment (CRISIL, 2024; 2025).

Production and sourcing model

Zeal operates through a mix of owned farms, contract farming, and satellite farming under which it supplies shrimp seed, feed, probiotics, and other inputs on credit to small farmers and procures shrimp at harvest. As of 2024, it operated around 160 farms across 300 ha (548 ponds), with an annual output of approximately 2,000 MT. A significant share of sourcing is through related-party farms owned by directors and their relatives.

According to the company's financial reports for 2024–25, Zeal undertakes contract farming arrangements with five related-party entities, Agni Aqua Farm, Akash Aqua Farm, Jal Aqua Farm, Pruthvi Aqua Farm, and Vayu Aqua Farm, owned by its directors. In addition, the company has contract farming arrangements with ten related-party firms owned by relatives of the directors, including Deep Aqua Farm, Dinkar Aqua Farm, Divya Aqua Farm, Tapi Aqua Farm, Darshan Aqua Farm, Dilip Aqua Farm, Dhaval Aqua Farm, Preety Aqua Farm, Kimi Aqua Farm, and SR Aqua Farm.

Apart from contract farming, Zeal also undertakes purchase and sale transactions with farms owned by its directors and with companies sharing common directors, as well as firms owned by relatives of the promoters. These arrangements indicate a high degree of operational and ownership integration within the company's supply network.

Markets and buyers

Zeal exports primarily to Europe (Germany, Belgium, the Netherlands, Southern Europe), Japan, the US, South Korea, Vietnam, Australia, and China. It has a supply agreement with Lenk Frozen Foods, enabling integration into EU distribution networks. Trade data shows exports to over 140 buyers, with Europe (Germany, Belgium, and the Netherlands) as the dominant destination. It has invested in freezing equipment to expand production for the Chinese market, which was expected to account for over 50% of its output by 2025 (Crisil, 2024; Fishery News, 2023; Rietdijk, 2023).

Major buyers included Rari Food International GmbH, BML Food Group Holland BV, Coral International, Adri en Zoon, and Seafood Connection BV. Other databases also list France Agro Industries and Seamark Plc as buyers (Volza, n.d.; NBD Data, n.d.; Abrams, n.d.).

Certifications and traceability

The company holds ASC, BRC, HACCP, FSSAI, and FDA certifications. Black Tiger shrimp is ASC-certified, and the company markets its products under various brands — Navik's Shrimp, Patel's Shrimp, Seaboy, Golden Ocean, and Laschori.

Turnover: ₹521 crore (2025); ₹405.65 crore (2024) / Approx. ($60 million in 2025 and $48 million in 2024

Profit after tax: ₹10.09 crore (2025); ₹8.27 crore (2024) / Approx. ($1.18 million in 2025 and $991,906 in 2024)

Quarterly Results

Figures in Rs. Crores

	Sep 2022	Dec 2022	Mar 2023	Jun 2023	Sep 2023	Dec 2023	Mar 2024	Jun 2024	Sep 2024	Dec 2024	Mar 2025	Jun 2025	Sep 2025
Sales +	124.31	133.81	65.34	79.99	116.40	136.38	65.04	87.24	152.16	169.34	102.58	123.87	184.70
Expenses +	118.61	127.27	61.24	76.62	112.19	130.32	57.49	82.25	146.49	157.49	92.13	117.29	174.32
Operating Profit	**5.70**	**6.54**	**4.10**	**3.37**	**4.21**	**6.06**	**7.55**	**4.99**	**5.67**	**11.85**	**10.45**	**6.58**	**10.38**
OPM %	4.59%	4.89%	6.27%	4.21%	3.62%	4.44%	11.61%	5.72%	3.73%	7.00%	10.19%	5.31%	5.62%
Other Income +	0.73	1.56	2.20	2.22	1.66	1.92	2.04	1.80	2.30	3.82	1.77	1.75	1.44
Interest	3.69	3.58	3.46	3.42	3.53	3.22	3.61	4.03	4.92	7.95	5.34	4.68	6.02
Depreciation	1.23	1.25	1.58	1.26	1.28	1.27	1.18	1.87	0.69	1.45	1.46	1.27	1.30
Profit before tax	**1.51**	**3.27**	**1.26**	**0.91**	**1.06**	**3.49**	**4.80**	**0.89**	**2.36**	**6.27**	**5.42**	**2.38**	**4.50**
Tax %	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	35.71%	33.33%
Net Profit +	**1.51**	**3.27**	**1.26**	**0.91**	**1.06**	**3.49**	**4.80**	**0.90**	**2.35**	**6.27**	**5.42**	**1.54**	**3.00**

Profit & Loss

RELATED PARTY

Figures in Rs. Crores

	Mar 2014	Mar 2015	Mar 2016	Mar 2017	Mar 2018	Mar 2019	Mar 2020	Mar 2021	Mar 2022	Mar 2023	Mar 2024	Mar 2025	TTM
Sales +	136	171	121	175	178	232	239	296	342	362	398	511	580
Expenses +	127	161	112	165	156	210	225	277	326	343	377	478	541
Operating Profit	**9**	**10**	**9**	**9**	**21**	**22**	**14**	**19**	**16**	**19**	**21**	**33**	**39**
OPM %	7%	6%	7%	5%	12%	9%	6%	7%	5%	5%	5%	6%	7%
Other Income +	0	0	0	0	2	6	11	5	8	8	8	10	9
Interest	3	4	5	4	9	10	12	13	10	14	14	22	24
Depreciation	1	2	3	2	8	8	7	7	6	5	5	5	5
Profit before tax	**5**	**4**	**2**	**3**	**6**	**9**	**6**	**5**	**7**	**8**	**10**	**15**	**19**
Tax %	33%	25%	2%	35%	32%	20%	12%	16%	20%	14%	19%	32%	
Net Profit +	**4**	**3**	**2**	**2**	**4**	**8**	**5**	**4**	**6**	**7**	**8**	**10**	**16**

Mindhola Foods LLP

Background and ownership

Mindhola Foods LLP, promoted by Hetal Patel and Krunal Patel, began operations in aquaculture in 1990 and entered shrimp processing in 2019. It operates under the brand “Oceanus”, producing both Black Tiger and Vannamei shrimp, and is headquartered in Surat.

Production and sourcing model

Mindhola is vertically integrated, owning nurseries, farms, and processing facilities, while also working with associated and contract farmers. As of the latest available information, it operates around 600 ha of owned farms and 2,000 ha of associated farms. The company undertakes two cycles of intensive farming annually and supplies feed (from CP Aqua) and other inputs to associated farmers, procuring shrimp post-harvest. Its processing facility employs around 100 professional and 800 skilled workers and is located near the Mindhola River in Palsana, while its nurseries are located close to the Arabian Sea.

Markets and buyers

The company targets Japan and Southeast Asia for large-sized shrimp (17–18 count/kg). Additional export destinations include China, the US, the Middle East, New Zealand, South Africa, and Taiwan. Trade data indicates Japan, China, and New Zealand as its principal markets.

Major buyers include Sea Treasure Seafoods (New Zealand), Alliance Foods Company LLC, Toyo Reizo Co. Ltd (Costa Rica), Flegenheimer International, Baywatch Seafood Inc., and Invictus Foods LLC (US) (Importgenius, n.d.; Volza, n.d.).

Certifications and traceability

Mindhola claims full traceability of its supply chain. Its factory holds USFDA, FSSC, and BRC certifications, with ASC and BAP certifications in process for farms and processing units (CARE Ratings, 2021; 2022; 2024).

Turnover: ₹197.59 crore (2025) and ₹237.65 crore (2024) / Approx. $22.8 million in 2025 and $28.5 million in 2024

Profit After Tax: ₹2.89 crore (2025) and ₹3.19 crore (2024) / Approx. $346,627 in 2025 and $380,000 in 2024

In 2025, the company purchased raw materials worth ₹26.05 crore from its sister concern Mindhola Aquaculture LLP and ₹61.26 crore from Oscar Sea Food.

Mayank Aquaculture Private Limited

Background and ownership

Established in 2005 by Dr Manoj Sharma, MAPL positions itself as a "pond-to-plate" enterprise serving both domestic and export markets. The company owns nursery/hatchery facilities, farms, and processing units, and also operates as a dealer for shrimp feed and health-care products.

Production and sourcing model

MAPL's farming operations span approximately 500 acres across four locations in Gujarat, producing around 2,000 MT of shrimp annually. In addition to its own production, the company provides technical consultancy and input support to other farmers.

Markets and buyers

MAPL supplies both domestic and export markets and markets shrimp under the brand "Zhingalala Fresh." (Singh, 2025; Yadav, 2025)

Turnover: ₹38.11 crore (2025) and ₹23.48 crore (2024) / Approx. $4.38 million in 2024 and $2.8 million in 2024

Profit After Tax: ₹9.66 lakh (2025) / ₹1.68 crore (loss) (2024) / Approx. $11,200 in 2025 and a loss of $201,000 in 2024

*The abovementioned figures are standalone financials of MAPL, which is reportedly engaged in aquaculture farming as per its financial statements. The related entities include Mayank Aqua Products and Manorama Aquatics Company. In 2025, MAPL sold goods worth ₹25.65 crore to Mayank Aqua Products and purchased goods worth ₹94.57 lakh from it. It also purchased goods worth ₹16.04 crore from Manorama Aquatics Company. Since these two entities are registered as firms and not companies, their financials could not be retrieved. The group's product arm - Zhingalala Fresh is also a partnership firm, and its financial statements are not available publicly. Thus, the group's earnings from processing and export could not be ascertained. Media reports, however, indicated that the group's annual turnover is ₹75-100 crores. Trade directories did not return information related to the international buyers of MAPL's shrimp.

The satellite and contract farming model shifts production risks associated with disease, crop failure, price volatility, and labour management to farmers while consolidating control over inputs, prices, and market access at the company level. These arrangements allow exporters to scale production without expanding their own landholdings or workforce. Vertical integration, either direct or through related-party entities, enables tighter control over supply while diffusing accountability for labour conditions, which at the farm level remain outside the scope of most certifications, despite the company's compliance credentials. Certifications and traceability systems focus primarily on product safety, environmental parameters, and documentation, rather than on working conditions, recruitment practices, or employment security at farms. As a result, labour remains structurally invisible within otherwise highly monitored and surveilled supply chains.

Seafood supply chains are inherently complex and multi-step, typically involving farms, processors, exporters/importers, distributors, and retailers or brands. Once shrimp enters a country or region through a distributor, it is often re-packed or re-labelled, making it difficult to trace the product back to the original farm at the point of consumer packaging. However, linking end markets to production regions remains critical, as it allows consumer markets and traders to be connected to the social and environmental impacts embedded in production. Accordingly, this section makes selective assessments using publicly available information.

Following the imposition of tariffs by the United States, Indian exporters began shifting focus towards Europe. The European shrimp market is fragmented and highly differentiated, with distinct product preferences, distribution systems, and dominant players across sub-regions. Southern Europe — particularly Spain, France, Italy, Portugal, and Greece- constitutes a major shrimp market, where demand is increasingly met through imports. Most imported shrimp in these countries is sold through the retail sector (van der Pijl, 2024).

Concerns regarding the quality of Indian shrimp in the EU emerged in 2016, when antibiotic contamination was detected, leading to heightened food safety scrutiny and stricter inspection regimes (Kumar, 2018). Since then, compliance has reportedly improved. In 2025, India registered 102 new fishery units with the EU, including 16–17 units from Gujarat, specifically benefiting aquaculture shrimp and cephalopods (squid, cuttlefish, and octopus). With these additions, the number of EU-approved Indian seafood export units increased to 604 (IREF, 2025; Business Standard, 2025).

In July 2025, India also signed the Comprehensive Economic and Trade Agreement (CETA) with the United Kingdom, resulting in the elimination of import tariffs on Indian marine products, including shrimp, frozen fish, and value-added items. It is envisaged that this agreement will triple India's seafood exports to the UK to ₹3,000 crore over the next three years (PTI, 2025).

Based on estimated import values, Shrimp Insights compiled a list of top shrimp importers in Europe, from which importers sourcing from India have been collated for this study (van der Pijl, 2025). Publicly available sources similarly identify major importers across key European markets, providing insights into the dominant players involved in the trade. Drawing on these sources, along with trade directories and other publicly available information, this study has compiled a list of brands reported to be importing shrimp from India. Particular emphasis has been placed on identifying companies that import from the Gujarat-based exporters profiled in the preceding section, to link regional production to downstream markets, along with providing turnovers and profits, wherever publicly available.

Gujarat entity	Country	Buyer	Brands	Financials
Zeal Aqua Limited	Germany	Rari Food International Gmbh	Laschori	Turnover - 112,434,622 EUR ($124.09 million) (2023) Profit - 1,086,541 EUR ($1.19 million) (2023)*
Zeal Aqua Limited	Germany	Lenk Seafood Services GmbH / Lenk Frozen Foods, Thailand	Sea Scout "Sea-Scout Black Tiger / warm water shrimp" Asia Mar shrimp / seafood TopSea sustainable aquaculture/shrimp products Luna Shrimp Farms premium shrimp brand farmed/controlled by Lenk (Bangladesh origin, etc.)	Profit - EUR 798,489.19 ($855,461) (as of June 2024)*

*German Corporate Registry

Gujarat entity	Country	Buyer	Brands	Financials
Zeal Aqua Limited	Netherlands	BML Food Group Holland BV	Ben’s Easy Kitchen	Group revenue - $50-75 million (2024)*
		Adri En Zoon Schaal-En Schelp	Golden Ocean	Revenue - $206.16 million (n.d.)^
		Seafood Connection BV (Owned by Maruha Nichiro, Japan)	Seacon Sealight Blue Planet Happy Fish The Sea & We	Sales - Y130.97 billion ($842.7 million) (2024) Profit - Y2.77 billion ($18.28 million) (2024)+
	United Kingdom	Seamark Plc	Tiger (Vannamei, Cooked Peeled) Mr Prawn (Cooked Peeled) Lilly (Cooked Peeled, Blanched Peeled) Classic (Raw Peeled) Neutral (Raw Peeled)	Turnover - £15.2 million ($19-20 million) (2024) Loss - £1,06 million ($1.32 million) (2024)~
	France	France Agro Industries (Groupe JMI)	Brands not known	Group Revenue - $280-320 million*
	US	Censea (Owned by Captain Fresh)	Censea	Group Revenue - ₹3,500 crore ($402.5 million) (2025) Group Net Profit - ₹42 crore ($4.87 million) (2025)”

*Shrimp Insights, December 2025
^Dun & Bradstreet Business Directory
+Just Food – December 2025
~UK Corporate Registry
“Founder Thesis - https://www.founderthesis.com/p/how-utham-gowda-built-captain-fresh

Gujarat entity	Country	Buyer	Brands	Financials
Zeal Aqua Limited	Korea	Coral International	Brands not known	Sales - 53.44 billion KRW ($36.45 million) (2024) Net Income - 1.86 billion KRW ($1.35 million) (2024)*
Mindhola Foods LLP	US	Flegenheimer International	Import agent - Brands not known	Revenue - Under $5 million^
		Alliance Foods Inc. (Through Alliance Foods Company LLC, Dubai)	Food brokerage company - Brands not known	Revenue - $14.8 Million^
		Baywatch Seafood Inc	Brands - Nature Fresh, AFF Star, C-Bay, Oceanika, Pan Aqua and Double A.	Not available
		Sea Star Seafoods, Frisco, Texas	Seafood importer and distributor - Brands not known	Revenue - Under $5 million^
		Invictus Foods LLC	INVICTUS	Revenue - Under $5 million^
	Japan	Toyo Reizo Co., Ltd	Kami no Ebi	Sales - Y172.3 billion ($1.14 billion)+

*Korean Corporate Registry
^ZoomInfo - Trade Directory
+Group website

Gujarat entity	Country	Buyer	Brands	Financials
Mindhola Foods LLP	New Zealand	Sea Treasure Seafoods Ltd	Sea Treasure - Sold at Costco Wholesale, PAK n SAVE, Woolworths, New World, Gilmours, Oceanz Seafood, Seafood Bazaar	Revenue - $3 million*

*RocketReach - Trade Directory

Other companies sourcing from India*

Country	Group company	Subsidiaries	Group revenue
Spain	Nueva Pescanova	Pescanova (Spain), Pescanova Hellas (Greece), Pescanova (Italy), Pescanova (Portugal)	$1-1.1 billion
	Grupo Profand	Caladero (Spain)	$1.2 billion
Netherlands	Parlevliet van de Plas	Heiploeg (Netherlands), Deutsche See (Germany)	$1.8 billion
	Brouwer Groothandel Groep	Fisherman's Choice (Netherlands), Asian Express (Netherlands)	$850-900 million
	Dayseaday Group	Dayseaday Frozen (Netherlands), Dayseaday Fresh (Netherlands), Oceanis (RO)	$150 million

*Shrimp Insights, December 2025

Country	Group company	Subsidiaries	Group revenue
Japan	Maruha Nichiro	Seafood Connection (Netherlands), van der Lee Seafish (Netherlands), Asiatico (Netherlands), Northcoast Seafood (UK), Inlet Seafood (Spain)	$7.2 billion
	Nissui	Nordic Seafood (Denmark), Cite Marine (France), J.P. Klausen (Germany)	$5.8 billion
United Kingdom	Sykes Seafood Group	Ruskim (UK), Big Prawn Company (UK), Klaas Puul (Netherlands)	$500-600 million
	Escal	L'Assiette Bleue (France)	$150-200 million
Canada	Cooke Inc.	Morubel (Belgium), Ristic (Germany)	$4 billion
Italy	MARR	Antonio Vemini S.r.l., Frigor Carni S.r.l., New Catering S.r.l., Jolanda de Colo S.p.A. (Italy)	$2 billion
Belgium	Thalassa Seafoods		$60 million

Country	Group company	Subsidiaries	Group revenue
Germany	Metro AG	Metro France S.A.S, Metro Deutschland GmbH, Metro Cash & Carry OOO (Russia), Metro Cash & Carry Romania SRL, Metro Italia S.p.A, Makro Distribucion Mayorista, S.A.U (Spain), Metro Grosmarket Bakirköy Alisveris Hizmetleri Ticaret Ltd. Sirketi (Turkey), Makro Cash and Carry Polska S.A (Poland), MAKRO Cash & Carry CR s.r.o (Czech Republic)	$31 billion

Tracing the Financial Flow and Profit Accumulation

Farm-level

The farm-gate price is a useful indicator of who dominates the supply chain at the domestic level. When farmers have greater power in anchoring the farm-gate price, a larger share of surplus is distributed to them. However, the functioning of the shrimp supply chain is such that control largely remains with processing companies, which exert significant influence over farms. In this context, farm owners, although termed “entrepreneurs”, may in effect represent a mechanism through which corporations externalise costs onto individuals who invest capital either independently or with corporate support.

However, what remains largely absent from these discussions is what flows down to farm workers. Across the supply chain, costs are ultimately passed on to workers through the lowering of wages. At the global level, all these actors — farmers, processors, and exporters- are themselves subject to pressures imposed by powerful global buyers, who retail directly with consumers and capture a disproportionate share of profits.

Farm-gate prices in India ranged from approximately ₹450–₹617 per kg before the imposition of US tariffs and were at their peak in 2021, following a recovery from the pandemic-induced decline in 2019. However, due to global oversupply, shrimp prices have declined and output has stagnated since peaking in 2021, significantly affecting margins across the supply chain (van der Pijl, 2024).

Our primary enquiries in Surat indicated that shrimp farms generally consist of clusters of ponds. The ponds visited during the research study measured either 80 × 80 metres or 100 × 100 metres (approximately 1–2 acres). Each pond is stocked with roughly 2–2.5 lakh shrimp seeds, with an expected mortality rate of around 20%. A farm owner typically invests ₹10–12 lakh per pond, covering machinery, labour, feed, motors, electricity, rent, and other operational costs. Initial pond preparation costs range from ₹50,000 to ₹70,000, depending on pond size. This is followed by water-filling costs, which involve electricity or diesel generator (DG) expenses. Once seeds are stocked, recurring costs include feed, machinery operation, labour, and medicines.

Shrimp are sold at prices ranging from ₹400 to ₹1,000 per kg, depending on the “count per kilogram,” with lower counts fetching higher prices. Each pond yields approximately 5,000–6,000 kg of shrimp. Under favourable conditions, farm-level margins are reported to be around 30–40%, though disease outbreaks can significantly reduce output and lead to losses. Land used for shrimp farming is often government or cooperative (mandali) owned and leased or sub-leased for periods of 15–20 years. Some processing companies also operate their own farms. There are mid-sized and small farmers, and large operators who may manage 100–200 ponds.

A farm owner in Olpad reported that with a good harvest, profits can reach ₹7–8 lakh per pond, with approximately 70% of earnings accounting for costs and 30% constituting profit. In September 2025, shrimp were sold at ₹560 per kg for a 22-count, ₹570 for a 21-count, with rates decreasing or increasing by ₹10 depending on size. Each pond yielded around 5,000 kg. Investment per pond ranged between ₹8–10 lakh, with seed expenses alone amounting to ₹2.5–3 lakh for smaller ponds.

Workers in Olpad indicated that around 100,000 seeds are stocked per pond, and that the September 2025 harvest yielded 21 count shrimp. Workers in Dumas estimated that owners earn closer to 20% profit due to high expenses. For three ponds, approximately ₹35 lakh was spent on feed, ₹5 lakh on medicines, ₹5 lakh on diesel, and ₹5 lakh on labour, in addition to repair costs. Under these conditions, profitability remains uncertain, and losses are common when harvests are poor.

A farm owner in Dumas reported pre-tariff rates of ₹500 per kg for 30-count shrimp, ₹600 for 20-count, and ₹650 for 16-count. A premium rate of ₹1,150 per kg applies to 10-count shrimp, which require nearly 200 days to grow. Shrimp above 40 count/kg are considered economically unviable due to low prices. Following US tariffs, rates reportedly fell to around ₹440 per kg for 20-count shrimp, prompting farmers to consider China as an alternative market offering prices approximately ₹100 per kg higher. Farmers also reported that companies pass on Goods and Services Tax (GST) burdens related to container shipments to them, and delays in procurement often force distress sales at reduced prices. Further, processing companies can also control prices by delaying procurement, forcing distress sales at reduced prices of ₹5-10 per kg.

On slippery slope

Shrimp farm gate prices (₹/kg)

Count*	Jul 30	Aug 6	% chg
30	470	425	-9.6
40	450	365	-18.9
50	360	335	-6.9
60	340	315	-7.4
70	310	295	-4.8
80	290	275	-5.2
90	270	255	-5.6
100	260	245	-5.8

Source: Business Standard, 2025
Image 2: Shrimp Farm Gate Prices

Evidence from Andhra Pradesh further illustrates these dynamics. In December 2023, farm-gate prices for 40-count shrimp were approximately USD 4 per kg (₹330 to ₹335), while production costs ranged from USD 3 to 3.5 per kg (₹250 to ₹290), yielding margins of 12–25%. Andhra Pradesh generally enjoys higher farm-gate prices and lower costs, suggesting that margins in other states can be lower. Margins decline further with slow growth, higher feed use, or increased mortality.

A 2017 study from Navsari district found that total production costs for Black Tiger shrimp were ₹6,83,951 per hectare, substantially lower than Vannamei at ₹9,53,981 per hectare. Gross income for Black Tiger was ₹16,12,426 per hectare per year, compared to ₹21,16,125 for Vannamei, resulting in cost–benefit ratios of 2.36 and 2.22, respectively (Navghan et al., 2017).

Shrimp farming typically requires ₹15–20 lakh per hectare in capital investment. Feed accounts for 50–60% of total costs, followed by seed (10%), labour (10%), chemicals (10%), and electricity (5–10%). Workers at a farm in Olpad reported that while total costs per pond can sometimes reach as high as ₹30 lakh, labour expenses, including night workers, amount to only around ₹1.8 lakh, suggesting labour absorbs a very small share relative to capital and feed expenses, despite the fairly labour-intensive nature of pond management, although not physically demanding but requiring 24/7 monitoring, and harvesting. Wage reduction thus emerges as a stabilising mechanism within the supply chain, absorbing price shocks and maintaining exporter margins under global buyer pressure.

Wholesalers and agents play a critical role in influencing farm-gate prices. Agents typically purchase shrimp from farmers and sell to processors, earning commissions of ₹4.9–₹6.7 per kg, with payments to farmers made after deducting commissions. A farm owner in Dumas noted that processors exercise significant control over procurement; delays in collection can lead to substantial losses for farmers.

Following the US tariff announcement, exporters in Andhra Pradesh reportedly planned to pass the entire burden onto farmers by reducing procurement prices (Janyala, 2025). Farm-gate prices reportedly fell to ₹350–395 per kg for 30-count shrimp, while production costs remained around ₹280–300 per kg, disproportionately affecting smallholders with holdings of up to 2 hectares (World Trade Scanner, 2025).

Apart from the government support provided through loans and subsidies for aquaculture, such as the Kisan Credit Card for Fisheries and the Pradhan Mantri Matsya Sampada Yojana, major public and private sector banking and financial institutions are also involved in financing aquaculture production in India. This includes Bank of India, Ujjivan Small Finance Bank, Bank of Baroda, Canara Bank, and Axis Bank for both recurring expenses and capital investments.

Processor-exporter level

Processing costs are estimated at approximately ₹28.73 per kg, with export agent commissions ranging from ₹5.5–₹7 per kg. Exporters reportedly receive ₹550–₹700 per kg for processed shrimp from foreign buyers. In the first five months of FY2026, India's shrimp exports averaged USD 6.98 per kg (~₹640 per kg) (Singh, 2025). In mid-July 2025, export deals for IQF Vannamei (peeled and deveined) ranged from USD 7.16 to USD 9.70 per kg (~₹616–847 per kg), depending on count. During the same period, farmed Black Tiger shrimp exported to Europe were priced between USD 6.90 and USD 8.45 per kg (~₹593–727 per kg for head-on semi-IQF packs, while large-sized headless Black Tiger fetched prices as high as USD 22.25 per kg (₹1900–₹2000 per kg) (Info Fish, 2024).

To further illustrate unequal value distribution, we examined the financials of Gujarat-based processing companies. At Zeal Aqua, each of the four Whole-Time Directors earned ₹3,00,000 per month, exceeding 5% of the company's net profit individually and over 10% collectively. Director remuneration increased by 50% from the previous year, with a pay ratio of 45:1 compared to the median employee salary of ₹21,864 per month. Site labour and wage expenses were reported at ₹168.468 lakh in 2023–24 and NIL in 2024–25. Contract farming charges were ₹47.041 lakh in 2023-24 and ₹55.881 lakh in 2024-25. Labour work expenses in 2023-24 were ₹223.248 lakh and in 2024-25 were ₹141.076 lakh.

While power imbalances between foreign buyers and domestic exporters constrain the agency of Indian processing companies, these pressures translate into a system where low wages are structurally embedded. At the same time, local dynamics, particularly identity, caste, and migration status, play a crucial role in shaping labour exploitation. Even where buyers retain some agency, workers remain entirely excluded from decision-making processes

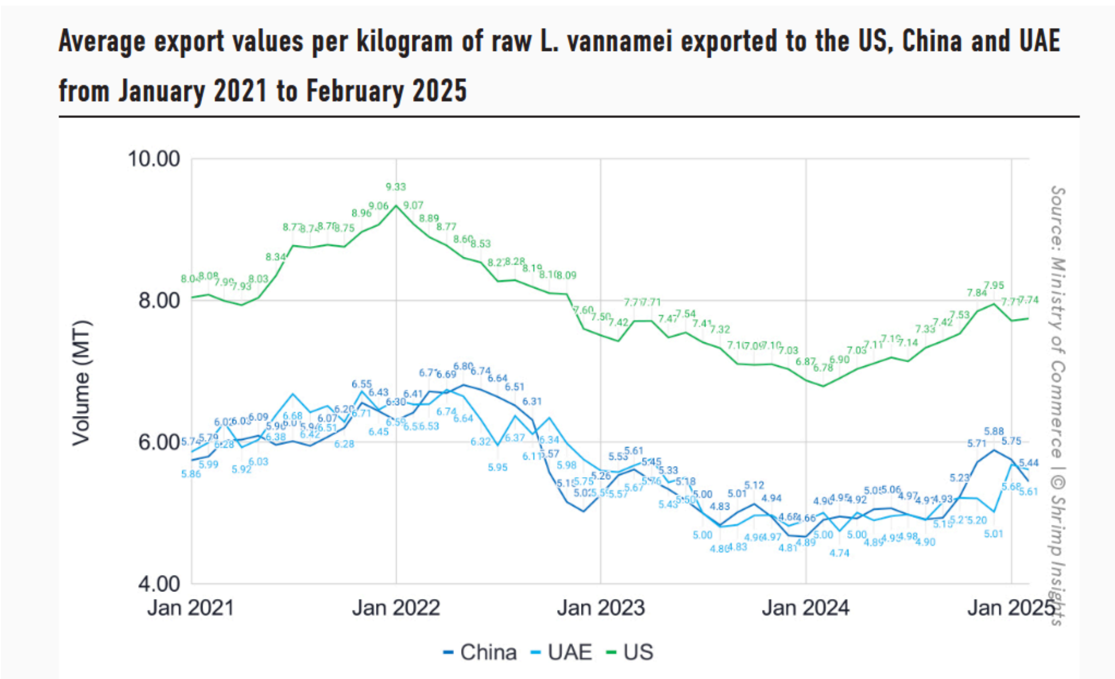


Chart 3: Average Export Values - Vannamei

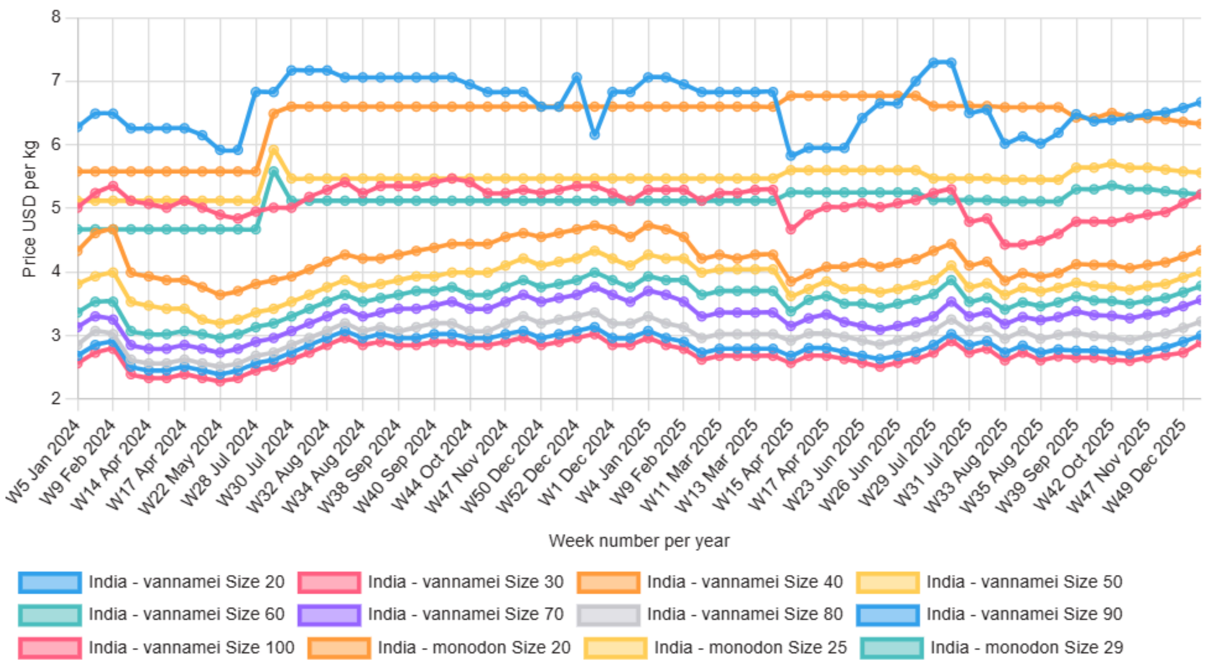


Chart 4: Vannamei and Monodon prices
Source: Shrimp Insights, May 2025

Component	Indicative Figures	Notes
Capital investment	₹15–20 lakh per hectare	Depending on size and technologies deployed
Total Operational Cost per pond	₹8–12 lakh (some report up to ₹30 lakh)	Variation by size, species, intensity
Seed cost	₹2.5–3 lakh per pond (~25% of total operational cost)	
Feed cost	₹2.5–3 lakh per pond (50–60% of total operational cost)	Largest cost component
Labour cost	~₹1.8 lakh per pond (~15% of total operational cost — as reported, including food and night workers)	~What workers end up receiving is less than ₹1 lakh
Medicines & chemicals	~10% of total cost	
Electricity / diesel	5–10% of total cost	To run aerators, pumps

Component	Indicative Figures	Notes
Farm-gate price (pre-tariff)	₹450–₹617/kg	Peak in 2021
Farm-gate price (post-tariff)	₹350–₹440/kg (20–30 count)	Tariff impact
Farmer margins	10–40% (highly variable)	Declining post-2021
Agent commission	₹4.9–₹6.7/kg	Deducted from farmer payment
Processing cost	~₹28.73/kg	Excluding procurement
Exporter sale price	~₹700/kg (processed)	To foreign buyers
High-end export price	Up to USD 22.25/kg (₹1900 - ₹2000)	Large Black Tiger sizes

Table 6: Indicative Prices and Margins

Post the US tariff, the following indicative price structure defines the supply chain:

Stage	Price (approx)	Margins	Notes / Source
Farm-gate (India)	₹350–₹650 / kg	~15–20% with farmers	Typical farm prices based on industry reporting on costs and prices, variable according to counts and species. (mint) Margins after accounting for agent commissions, delayed pickups, disease risks
Export FOB (India)	~US$7.69 / kg (to US)	~8-20% with processors and ~10% with export agents	Average landing value (FOB) to US before duties (2025). (mint; Starlin and Jothi, 2023) Wide range reflects species, size, and value-added variation.
Import CIF (US/EU)	~US$9–$12 / kg (Estimated)	~15–20% with importers	Includes freight, insurance, tariffs — illustrative (typical seafood freight + tariffs add value).
Retail Price (EU/US)	~US$15–$25 / kg (Estimated)	~30–50% with retailers	Supermarket/brand markup, value-added processing, retail margins. Retailers command high margins due to direct consumer access and branding, particularly with labels like "locally caught" or other quality assurances

Table 7: Indicative Price Structure along the supply chain

It must be noted that the above figures are indicative and based on industry reports, trade data, and field-based estimates. While farm-level margins sometimes appear substantial in absolute terms, they are highly contingent, uneven, and risk-laden, unlike retailer margins, which are more stable and institutionally protected. The wages fixed for farm workers, without any consultations or negotiations with them, are embedded within production costs and kept persistently low, ensuring flexibility for exporters and processors operating under intense price pressure from global buyers and international trade dynamics.

As shrimp moves away from the farm, value is added through processing, logistics, certification, branding, and retail mark-ups, and the share accruing to labour at the production stage diminishes further in relative terms. Workers are entirely excluded from decision-making across the chain and have no mechanism to claim a share of surplus during high-price cycles. This structure reflects a political economy in which power asymmetries between retailers and exporters, exporters and farmers, and farmers and workers systematically reproduce low wages and precarious labour conditions by design. Conversations and programs around improving sustainability or ethical compliance in the sector that do not directly address low wages, lack of bargaining power, and precarious working conditions risk reproducing the status quo hidden behind the language of certification and due diligence.

The Reality of Labour and Social Relations in Shrimp Supply Chains

An estimated 1.2 million Indian families rely directly or indirectly on the shrimp sector (CAL, 2025). According to another estimate, close to one lakh shrimp farms and around 2–3 lakh workers are engaged directly, while processing plants employ approximately 60,000 to 75,000 people (van der Pijl, 2024). While shrimp farming is promoted by claiming that it boosts the local economy and livelihoods, the labour hired at both farms and processing factories is largely migrant. This was witnessed by CLRA during field research across various farms in Surat.

The production models adopted by shrimp exporters in Gujarat have direct implications for labour relations. Reliance on satellite farming, contract farming, and associated farms allows exporters to avoid formal employer–employee relationships with farm workers. Workers are typically hired seasonally, often through informal networks or labour contractors, and are predominantly migrants from other regions. This system reinforces informality by design. Since farms are legally independent entities, exporters are able to disassociate themselves from responsibility for wages, living conditions, occupational safety, and social security. Even where farms are effectively controlled through credit arrangements, input supply, or related-party ownership, labour accountability remains fragmented.

Further, the preference for migrant labour over local workers reflects both economic considerations and mechanisms of social control. Migrant workers are perceived as more flexible, more dependent, and less likely to organise or demand rights. This labour regime aligns with global buyer pressures for low-cost and flexible production, effectively linking consumer markets in the Global North to precarious work arrangements in coastal Gujarat. Thus, while shrimp supply chains are increasingly audited for food safety and environmental compliance, labour exploitation persists as a structural feature embedded in the very organisation of export-oriented aquaculture.

The preceding section mapped the structure of shrimp supply chains linking farms in Gujarat to export markets in Europe and the United States. Exporters and processors exercise significant control over inputs, quality standards, production cycles, and market access, while employment relations at the farm level remain informal, decentralised, and largely invisible within compliance and traceability frameworks. It is within this structural context that labour is recruited, managed, and disciplined on shrimp farms and factories. It is important to understand how these global and regional dynamics translate into everyday work arrangements.

Media reports from 2010 indicate that shrimp farming influenced the economic condition of around 10,000 families across 20 villages in Surat district, improving their standard of living. It was also reported that there had been reverse migration in the region, with sections of the local population returning to their villages to take up shrimp farming. Land was first granted for shrimp farming in Dandi village, Olpad, in 1994 to around 88 people (Yadav, 2025; Bhatt, 2010).

According to farm registration details available on the website of the Coastal Aquaculture Authority (CAA), in Surat, 43.94% of registered farms are owned by individuals bearing the surname Patel, and 28.03% by those bearing the surname Khalashi/Khalasi. During visits to the farms, it was reported that the owners are Koli Patels. These local caste dynamics also shape labour relations, which should be explored further. It is pertinent to note that while shrimp farmers have collectivised through associations, the idea that workers should be able to do the same is not encouraged.

CLRA's own study at shrimp farms in Surat highlighted multiple labour rights violations, which was published in December 2025. Through surveys of 335 migrant workers and in-depth interviews with workers, supervisors and farm owners, the report highlighted that the workforce is predominantly young, male, tribal migrants. Around 42% workers were from Sundargarh, Odisha, around 28% from Simdega, Jharkhand, and around 9% from West Singhbhum, Jharkhand. Migration is seasonal and circular, aligned with the shrimp production cycle. Around 66% of workers stay on farms for 7–10 months, engaging in activities beginning with pond preparation till harvest. Wages are around ₹8,000–12,000 per month, below the statutory minimum wages, accounting for hours of work and lack of weekly rest and ration costs are deducted without transparency. Around 93% of workers are paid only at the end of the season, often after returning to their home villages. Workers mostly live in dwellings next to the ponds inside the farm,s with around 60% staying in *kutcha* structures and around 94% without toilets. Shifts are 12–14 hours a day, but workers are expected to be available 24/7 as they live on the farm.

The absence of documentation renders workers invisible to labour administration and strips them of their enforceable rights. Employers prefer migrants because their isolation and vulnerability enable greater control. The combination of isolation, withheld wages, and surveillance creates conditions resembling captive labour. The work of continuous pond monitoring, feeding multiple times a day, night duties, and emergency responses is not viewed as labour-intensive. There are no regular health check-ups, and workers are reliant on the farm owners for hospital visits. Occupational risks are normalised through individualisation of risks, and some cases of death due to electrocution were cited, as well as heightened risks during the rains. The spatial isolation of farms cuts workers off from other workers, making it difficult to organise.

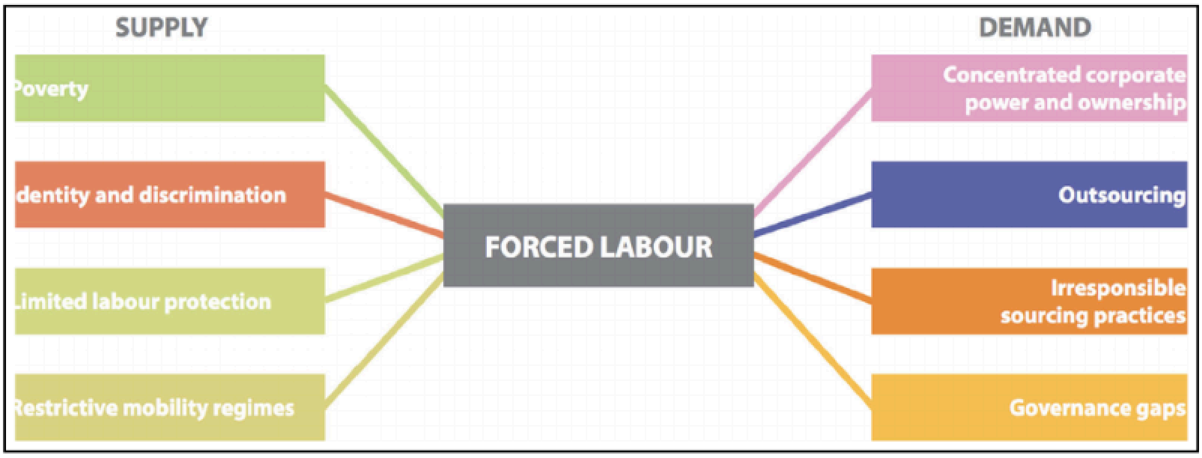
Concerns around labour exploitation in the shrimp sector have also been raised at the international level. In 2020, the Southern Shrimp Alliance (SSA) filed a complaint with the United States International Trade Commission (USITC), calling for an investigation into the influx of "illegal, unreported, and unregulated seafood" into the United States. The complaint highlighted violations of both fisheries management regulations and labour laws, including the use of forced and child labour in foreign production, which artificially lowers costs through human rights abuses. With regard to shrimp, the SSA highlighted instances where workers were locked inside shrimp peeling plants and processing factories. It further alleged that US importers were unwilling to take steps to rectify these violations or support mandatory traceability programmes.

Citing the International Labour Organisation (ILO), the SSA noted that aquaculture operations are particularly vulnerable to labour-related misconduct due to isolated workplaces that physically restrict workers' ability to leave or escape abusive situations. Non-physical forms of coercion were also highlighted, including debt bondage and the withholding of identity documents of migrant workers (Southern Shrimp Alliance, 2020).

Several specific incidents further underscore these concerns. In September 2020, twenty minor girls from Ranchi, Jharkhand, were rescued from a shrimp processing facility in Mindhola. The girls, along with women workers, had been brought from Ranchi to Surat to work in a textile factory and were later moved to the shrimp processing unit. Aadhaar cards of some girls showed that they were below 18 years of age, while others were found to have forged Aadhaar documents (The Indian Express, 2020; Mehta, 2020).

It must also be noted that a significant number of shrimp farms operate without registration, effectively removing them from any regulatory scrutiny. Despite sporadic action by authorities over the years, these farms continue to function. In 2019, illegal shrimp ponds spread over hundreds of hectares of state government land in Olpad and Choryasi talukas of Surat district came under the radar of the Income Tax Department following complaints of tax evasion linked to aquaculture farming and exports. Authorities demolished some ponds for which no claimants came forward. The IT Department alleged that shrimp and fish cultivated on illegal farms were being exported without any record (Times of India, 2019).

Thus, hiring migrant labour, informal recruitment, and the diffusion of employer responsibility across fragmented and legally ambiguous and independent farms enable exporters and processors to benefit from low-cost and flexible labour while remaining insulated from accountability. At the same time, local social hierarchies and the absence of collective labour organisations further entrench workers' vulnerability.



Typology of Root Causes of Forced Labor in Supply Chains.Reproduced from LeBaron et al. (2018): 8.
[Color figure can be viewed at wileyonlinelibrary.com]

Image 3: Root causes of forced labour in supply chains
Source: LeBaron, 2021 (The Role of Supply Chains in the Global Business of Forced Labour)

The Ecological Dimension of Shrimp Farming from Gujarat

The common understanding, both in the public domain and in discussions with farm owners, is that shrimp farming has transformed ‘barren’, ‘unproductive’, ‘salt-enriched’, or ‘wastelands’ into ‘productive’ and ‘profit-making’ endeavours for the local population in Surat, thereby benefiting the local economy (Gupta, 2025). This narrative is frequently repeated across the country to justify the takeover of land for commercial or contract farming, even though such benefits often accrue only to a select few. The argument commonly advanced is that the salt content of the land renders it unsuitable for any other agricultural activity and therefore ‘barren’.

These claims have been reinforced by shifts in the regulatory framework governing coastal aquaculture. Following the 1996 Supreme Court order banning aquaculture activities in Coastal Regulation Zone (CRZ) areas, the Coastal Aquaculture Authority Act was enacted. Over time, however, the regulatory focus shifted away from monitoring and enforcement towards facilitating the ease of doing aquaculture, rather than acting as a robust oversight mechanism, as originally envisaged (Colson et al., 2025; Durai et al., 2023).

While benefits to the local economy and population do exist, questions regarding who these benefits accrue to, who is excluded, and who is brought in from outside under precarious conditions are often ignored or pushed under the carpet. Another critical dimension of shrimp farming and aquaculture, discussed increasingly in recent years, is its significant ecological impact, not only in Gujarat but also in other states where aquaculture has expanded over time. Key ecological impacts highlighted by CAL include groundwater contamination due to salt seepage from shrimp ponds, coastal pollution caused by effluents discharged from farms and hatcheries, adversely affecting coastal ecology, and mangrove destruction leading to ecosystem degradation (CAL, 2025).

A study conducted in Navsari district in Gujarat and published in 2024 similarly indicated increased soil and groundwater salinity as a result of shrimp farming, adversely affecting environmental health and crop productivity for rice growers in the region. The discharge of untreated water by shrimp farmers was also identified as a concern, as effluent treatment is often neglected. A study by the Central Ground Water Board (CGWB), Government of India, reported that shrimp farms operate by pumping seawater from creeks into tanks near the ponds; after desilting, this water is transferred to the ponds as required. The recharge of saline water into aquifers leads to deterioration in groundwater quality. Further, during periods of low seawater salinity, particularly during the monsoon, saline groundwater is also pumped to regulate salinity levels in shrimp tanks. This practice induces up-coning of saline water — the upward movement of saline groundwater into freshwater aquifers, rendering the water unfit for both irrigation and domestic use.

Another report from 2019 indicated that the density of shrimp farms in the Mandroi region had pushed the Mindhola creek to change its course (Aqua Culture, 2019). A 2013 report identified ten mangrove species across South Gujarat, including along the rivers Mindhola, Purna, Ambika, Auranga, Par, Kolak, Damanganga, Kalu, and Varoli. The report warned that the expansion of aquaculture farming in the region posed a significant threat to mangrove ecosystems (Bhatt, 2013).

Figure 3 *Changes in the density of farms in Mandroi which has also pushed the creek to change its course (right).*

March/April 2019 AQUA Culture Asia Pacific

Image 4: Changes in density of farms in Mandroi, Gujarat

These ecological concerns have also found expression through legal and regulatory interventions. In August 2020, the National Green Tribunal (NGT), acting on a petition filed by MSH Shaikh of the Brackish Water Research Centre, issued notices to the Ministry of Environment, Forest and Climate Change and other authorities over illegal encroachments by shrimp ponds and salt pans on the floodplains of the Tena creek and Kim river in Surat and Bharuch districts. The Surat Collector was tasked with mapping illegal shrimp ponds in the district. The complaint stated that these encroachments created bottlenecks in water flow to the sea, damaged coastal ecology, and violated the Environment (Protection) Act, 1986, as well as the Coastal Regulation Zone (CRZ) Notifications of 2011 and 2019. The mapping exercise was intended to identify shrimp farms, assess their legal status, examine compliance with permission conditions, determine CRZ violations, and measure individual ponds (Indian Express, 2020).

In a separate complaint, an environmental scientist alleged illegal shrimp farming encroaching upon the deltaic area of the Tapi River and the floodplains of the Mindhola River in Surat district, across villages including Junagam, Sunvali, Damka, Abhva, Khajod, Budiya, Talangpor, Umber, Dumas, Bhimpor, Kadiyabet, Bhatpore, and Gabheni in Choryasi taluka. These activities were alleged to violate provisions of the CRZ Notification, 2011, the Water (Prevention and Control of Pollution) Act, 1974, and the Coastal Aquaculture Authority Act, 2005. The complaint further alleged that shrimp farms had encroached upon government and village common lands, resulting in the loss of intertidal fishing areas and small creeks. It was also claimed that the construction of earthen bunds and 3–5-metre-wide approach roads, without permission, had blocked creeks and wetlands, leading to the loss of feeding grounds for migratory and resident bird species. Additionally, the farms allegedly lacked mandatory effluent treatment systems, required for farms exceeding five hectares in size (Indian Express, 2020).

The Coastal Aquaculture Authority Act, 2005, provides for the establishment of the Coastal Aquaculture Authority (CAA) to regulate activities related to coastal aquaculture. Under the Act, aquaculture farms are required to be registered after an assessment of their environmental impacts. It was alleged that several shrimp farms operating in Surat were not registered with the CAA, the Revenue Department, or the Gujarat Pollution Control Board (GPCB), rendering them illegal (Roshni B. Patel vs Union of India & Ors., 2022).

A media report from July 2023 noted that, according to the Surat Municipal Corporation (SMC), illegal shrimp farms in the floodplains of the Mindhola estuary were contributing to flooding in the villages of Kumbhariya and Saniya Hemad in Surat district. SMC officials reported that they had written to the district collector seeking the removal of these illegal farms (Times of India, 2023). A subsequent study by the Central Groundwater Board, published in 2024, identified similar adverse impacts in other parts of Gujarat, including a decline in groundwater levels in Navsari district due to extensive groundwater extraction by shrimp farms for cultivation, ancillary operations, and salinity regulation.

Reports from June 2025 further indicated that bird strikes at Surat Airport were being attributed to shrimp farms operating in the surrounding Dumas region, including Bhimpore, Abhva, and Khajod, despite regulatory violations, including those related to CRZ guidelines. The Surat Mayor reportedly wrote to the district collector seeking action against these farms. The farms were also found to obstruct natural rivulets that carry rainwater runoff from Surat district into the Mindhola river estuary, leading to flooding in low-lying areas. Before the establishment of the shrimp farms, water flowed freely across the floodplains; however, the construction of ponds has disrupted this natural drainage. Although authorities had previously seized machinery and equipment from the farms, operations reportedly resumed within days. The district collector noted that while farms on government land were regularly monitored, some operated on private land, and requested support from the SMC to facilitate their removal (Mehta, 2025; Indian Express, 2025).

Taken together, the evidence calls into question the widely held belief that shrimp farming simply transforms ‘barren’ land into productive economic assets. While aquaculture has undoubtedly generated profits for some, it has also brought with it environmental damage, regulatory violations, and social exclusions that are often overlooked. The combined impacts on groundwater, soil salinity, coastal ecosystems, mangroves, and natural drainage patterns point to a form of expansion that is difficult to sustain over time and is frequently enabled by weak regulation and enforcement. Moving forward, it is necessary to look beyond simplified development and economic growth narratives and ask harder questions about who benefits from shrimp farming in coastal Gujarat, and who bears its environmental and social costs.

Key Demands and Way Forward

While transparency initiatives have gained prominence over the years, leading to brands having to introduce codes of conduct and both social and environmental audits for suppliers along the chain, these do not seem to be properly enforced. Processing units, which require certain certifications to be able to export, are often known to procure them through unethical means and collusion, or the certifying and audit agencies are ineffective in highlighting the concerns. Corporate Accountability Lab, in its investigation, found BAP-certified facilities, such as Nekkanti Sea Foods, in violation of basic labour rights standards. Thus, the transparency of the transparency initiatives is in question, and they seem to merely serve as marketing initiatives for brands (CAL, 2025).

Because of the 2024 investigations on shrimp farms in Andhra Pradesh by Corporate Accountability Lab, Associated Press, and The Outlaw Ocean Project, advocacy efforts and scrutiny have increased in the region. The Southern Shrimp Alliance requested the US Department of Labour to add Indian shrimp to its list of goods produced by child or forced labour. In September 2024, the US Department of Labour added shrimp from India to the 2024 List of Goods Produced with Forced Labour (TVPRA List), officially notifying all US buyers sourcing shrimp from India to exercise “additional due diligence” to combat forced labour. There have also been direct calls to shrimp retail brands such as Walmart and Aldi to take responsibility for their entire supply chains (SSA, 2024; Statecraft, 2024).

The response by domestic actors, however, has been concerning. For instance, the MPEDA and Commerce Ministry described reports of abuse as "isolated" and claimed that the industry operates in compliance with international standards. It claimed that the reports were prepared by “vested interests” to dilute India’s position in the global trade of shrimp — a rhetoric that is used for various other rights violations in the export-oriented sectors in the country. A media report indicated that the Commerce Ministry was likely advising exporters to commission independent studies on working conditions at shrimp farms to dispel concerns in the EU and US (The Hindu, 2024).

Activists worldwide have advocated for worker-centred models of due diligence in supply chains, rather than brand-led initiatives. However, worker-centred models will not easily gain acceptance amongst players higher up the supply chain, especially brands, as the changes such models can bring about will definitely have an impact on the bottom lines of the brands. Based on an understanding of the global shrimp supply chain from the coasts of Gujarat, along with studying the working conditions at shrimp farms in the Surat district, the following suggestions can be made for each actor.

1. Supply Chain Actors (Farms, Processors, Exporters, Retailers): Enhance supply chain transparency through full disclosure of farm-to-factory sourcing, including subcontracted farms and labour contractors. This information should ideally not be too complex for processing firms to pass on to buyers. While certification schemes such as the ASC already exist, buying companies that have more power in the chain need to treat it as a mandatory requirement.

Review and revise purchasing practices to prioritise suppliers that demonstrate verified compliance with safe working conditions, freedom of association, and collective bargaining across all tiers of the supply chain.

Prioritise sourcing from ASC and organic-certified shrimp supply chains, while collaborating with MPEDA to strengthen traceability systems.

Encourage lead buyers, particularly retailers who retain high margins, to technically and financially support processing firms in delivering training, fair wage implementation, and effective grievance mechanisms, with targeted assistance for smaller farms and enterprises that lack compliance capacity.

Buyers should establish independent, worker-accessible grievance mechanisms that allow Indian workers to report labour violations confidentially and without retaliation.

2. Certification Bodies and Audit Firms: Strengthen audit methodologies by mandating unannounced inspections and off-site worker interviews conducted in workers’ native languages, particularly for migrant workers.

Ensure greater transparency by requiring public disclosure of audit summaries, non-compliance findings, and corrective action plans, rather than limiting access to brands and buyers.

Introduce clear accountability mechanisms, including suspension or withdrawal of certification, for audit firms and certifying bodies found to be complicit in fraudulent practices or repeated failures to identify labour violations.

Incorporate worker-centred indicators into certification standards, including freedom of association, grievance mechanisms, and protections against forced labour, rather than focusing primarily on food safety and environmental compliance.

3. Government Actions: Mandate comprehensive supply chain disclosure through national policy frameworks, explicitly aligning requirements with International Labour Organisation (ILO) Conventions (notably Convention No. 29 on forced labour)

Strict enforcement of domestic legislation, such as the Factories Act and all relevant labour laws and codes, including enforcement of the 48-hour workweek.

Mandate registration of migrant workers at both the source and destination of migration — specifying the duration, work type, contractor name, wages, and other relevant details.

Strengthen environmental clearance and licensing processes for shrimp farms and processing units by incorporating mandatory labour audits alongside environmental assessments.

Establish regulatory oversight over labour recruiters and intermediaries to prevent debt bondage and coercive recruitment practices.

4. Worker Organisations, Trade Unions, and Civil Society: Facilitate the formation and recognition of worker collectives among shrimp farm and processing workers, including migrant and seasonal workers.

Support rights awareness programmes that inform workers about wages, working hours, contracts, and grievance redress mechanisms under existing labour laws.

Enable civil society organisations to function as independent monitors of labour conditions and to assist workers in accessing complaint mechanisms without fear of retaliation.

Provide legal aid and support services to workers facing wage theft or other forms of labour rights violations.

It is hoped that with the increased scrutiny towards the sector, all actors will understand their collective responsibility towards not just the consumers and the environment, but also the workers and the local communities in production regions, which are entangled in these chains but hardly reap any benefit at present. It is hoped that the suggested measures would strengthen labour rights protections by enhancing supply chain accountability.

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