**Baseline study for Development in Telangana state**

**ANN– 4.5**

Markets studied and highlights

The summary of market coverage across the study districts is given in here:

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **District** | **KMR** | **KRN** | **MAN** | **MDK** | **RGR** | **WPY** | **BDR** | **MBD** | **YDR** | **Overall** |
| **⯀ Markets** |  |  |  |  |  |  |  |  |  |  |
| * Local/rural | 50 | 60 | 33 | 97 | 86 | 95 | 70 | 83 | 85 | 659 |
| * Wholesale |  | 1 | 1 | 1 |  |  |  |  |  | 3 |
| Total | 50 | 61 | 34 | 98 | 86 | 95 | 70 | 83 | 85 | 662 |
| Percentage | 8% | 9% | 5% | 15% | 13% | 14% | 11% | 13% | 13% | 100% |
| **⯀ Aggregators** | 22 | 15 | 6 | 1 | 0 | 0 | 6 | 6 | 7 | 63 |
| **⯀ Consumers** |  |  |  |  |  |  |  |  |  |  |
| * Rural | 49 | 61 | 45 | 98 | 90 | 96 | 91 | 87 | 101 | 718 |
| * Urban | 25 | 50 | 27 | 42 | 23 | 37 | 20 | 53 | 45 | 322 |
| Total | 74 | 111 | 72 | 140 | 113 | 133 | 111 | 140 | 146 | 1040 |
| Percentage | 7% | 11% | 7% | 13% | 11% | 13% | 11% | 13% | 14% | 100% |
| **Overall per market consumer coverage** | **1.5** | **1.8** | **2.1** | **1.4** | **1.3** | **1.4** | **1.6** | **1.7** | **1.7** | **1.6** |

* **Market Aggregators**

As aggregators are important market intermediaries the field study involves feedback from 63 of them from 7 out of 9 study districts as shown in the table below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **District** | **Geo Code** | **INS.code** | **Markets** | |
| **No.** | **%** |
| * Kamareddy | A1 KMR(M2,M3,M4,M5 & M9) | MLRAQ(1-22) | 22 | 35% |
| * Karimnagar | A2 KRN(M1, M5, M6 & M7) | MLRAQ(23-37) | 15 | 24% |
| * Yadadri | C9 YDR(M1,M2,M4,M5,M7, M8 & M9) | MLRAQ(57-63) | 7 | 11% |
| * Mancherial | A3 MAN (M3 & M7) | MLRAQ(38-43) | 6 | 10% |
| * Bhadradri | C7 BDR(M1,M6,M8 & M9) | MLRAQ(45-50) | 6 | 10% |
| * Mahabubabad | C8 MBD(M1,M2,M5,M6,M8 & M9) | MLRAQ(51-56) | 6 | 10% |
| * Medak | B4 MDK (M3) | MLRAQ(44) | 1 | 2% |
| **Total** |  |  | **63** | **100%** |

* **Consumers response in rural areas (MCR)**

The survey covers 718 rural consumers as shown in the following tables:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **District** | **Geo Code** | **Inst. code** | **Rural Consumer** | |
| **No** | **%** |
| * Kamareddy | A1 KMR(M1-M9) | CONR(1-49) | 49 | 7% |
| * Karimnagar | A2 KRN(M1-M9) | CONR(50-110) | 61 | 8% |
| * Mancherial | A3 MAN(M1-M9) | CONR(111-155) | 45 | 6% |
| * Medak | B4 MDK(M1-M9) | CONR(156-253) | 98 | 14% |
| * Rangareddy | B5 RGR(M1-M9) | CONR(254-343) | 90 | 13% |
| * Wanaparthy | B6WPY(M1-M9) | CONR(344-439) | 96 | 13% |
| * Bhadradri | C7BDR(M1-M9) | CONR(440-530) | 91 | 13% |
| * Mahabubabad | C8MBD(M1-M9) | CONR(531-617) | 87 | 12% |
| * Yadadri | C9YDR(M1-M9) | CONR(618-718) | 101 | 14% |
| **Total** |  |  | **718** | **100%** |

* **Consumers in urban areas (MCU)**

The survey covers 322 urban consumers as shown in the following tables:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **District** | **Geo Code** | **INS.code** | **Urban Consumer** | |
| **No** | **%** |
| Kamareddy | A1 KMR(M2,M3,M4&M9) | CONUQ (1-25) | 25 | 8% |
| Karimnagar | A2 KRN(M1,M3,M4,M5,M6,M7 & M8) | CONUQ (26-75) | 50 | 16% |
| Mancherial | A3 MAN(M1,M3,M6,M7 & M9) | CONUQ (76-102) | 27 | 8% |
| Medak | B4 MDK(M1-M9) | CONUQ (103-144) | 42 | 13% |
| Rangareddy | B5 RGR(M1,M2,M3,M4,M5 & M9) | CONUQ (145-167) | 23 | 7% |
| Wanaparthy | B6 WPY(M1-M9) | CONUQ (168-204) | 37 | 11% |
| Bhadradri | C7 BDR(M8 & M9) | CONUQ (205-224) | 20 | 6% |
| Mahabubabad | C8 MBD(M1,M2,M3,M5,M6,M7,M8 & M9) | CONUQ (225-277) | 53 | 16% |
| Yadadri | C9 YDR(M1,M2,M4,M5,M7& M9) | CONUQ (278-322) | 45 | 14% |
| **Total** |  |  | **322** | **100%** |

* ***Highlights on marketing aspects***

**Local/Rural market (MLR)**

* The market feedback shows that most of the operators (60%) have continuing/ongoing informal arrangement with contracts/agreement with fishermen or co operatives regarding procurement of fish.
* The feedback indicates that in >70% of the cases the market operators face infrastructure constraints in procurement, handling and storage etc.
* Lack of infrastructure and non availability of ice are stated as the major problems in the market operations.
* Request for financial support from institutional agencies tops the list of expectations followed by subsidizing cost of infrastructure facilities without which operators face several risks in their business.

**Wholesale Market**

* As a part of the field study, feedback has been obtained from three wholesalers operating in the wholesale markets one each in Karimnagar, Mancherial and Medak districts.
* They procure fish from aggregator, reservoir societies as well as tank FCS, the weekly procurement being 2 to 5 tons.

**Market Aggregators**

* Their main procurement source is tanks (63%) followed by reservoir (21%) and other sources being (16%)
* On the question whether there is increased demand trend for any particular species nearly 90% of aggregators confirm that there is exceptional demand for murrels in all places.
* The feedback indicates that in >60% of the cases the market operators face infrastructure constraints in procurement, handling and storage etc.
* Lack of infrastructure and non availability of ice are stated as the major problems in the market operations.
* Request for financial support from institutional agencies tops the list of expectations followed by subsidizing cost of infrastructure facilities without which operators face several risks in their business.

**Consumer’s response**

* It is seen that over the period the consumption among rural consumers has increased 4 times and the enhancement in the highest consumption bracket (>40 kg) has been 23%. Similarly in urban consumers the increase is > 2 times and addition in the higher consumption category as above is 8%.
* More than 70% of the respondents in both the categories opine that fish consumption has increased from 25 to 50% in the last 5 yrs.