

Strengthening The Dried Fish Value Chain



This series is produced with support from:



Produced by:

Illustration: Apna Kuruvilla
Design: Navya Zibbu

Recommended citation:

Varghese, A.S., Sharma, A., Namboothri, N. (2025). ‘Strengthening the dried fish value chain’, in Varghese, A.S., Mukherjee, S., Sharma, A., Namboothri, N. (eds.) *Unlocking India’s Blue Economy Pathways*. Dakshin Foundation. Bengaluru.

This illustrated booklet is a part of the “Unlocking India’s Blue Economy Pathways” information series.

Dakshin Foundation is a charitable organisation, working towards the sustainable development of India’s coastal communities.

SeaChange is our intersectoral approach towards achieving the twin goals of healthy ecosystems and thriving communities. The SeaChange model employs a systems approach to address the complex challenges facing India’s coastal and marine systems. In several sites across the Indian coastline, fisher livelihoods are severely undermined by ecosystem degradation, fish stock declines, systemic poor health outcomes, climate challenges and poor resource governance. SeaChange interventions target such interlinked challenges by applying contextual solutions in partnership with local communities and system actors.

In alignment with SeaChange, this illustrated series presents Dakshin’s intersectoral interventions towards building blue economy pathways for India’s diverse coastal communities.

Drying is one of the oldest methods of fish preservation, deeply rooted in the fishing traditions of South Asian nations, like India. Globally, about 10% of the total fish produced is processed as dried, salted, or smoked fish. Particularly in India, sun-drying using salt as a preservative is the most widely practised processing technique.

It plays a critical role in supporting food security and nutritional well-being. Rich in nutrients, it serves as an affordable protein source, while also creating income and employment opportunities for many, especially women.

Along the east coast of India, the maritime state of Odisha has a high production of dried fish, with about 6.32% of its total catch being utilised for drying. Here, particularly in the Ganjam district, dried fish is significant both as a food source and a livelihood, especially for fisherwomen, who dominate its processing and trade.

From Ganjam, dried fish travels inland to Odisha's tribal belts and across the country to West Bengal, North East Indian states, and the southern states of Andhra Pradesh and Tamil Nadu. Its extended shelf life and affordability make it one of the only affordable sources of protein and micronutrients for both coastal and land-locked regions.



Ribbon Fish



Anchovies



Sardine

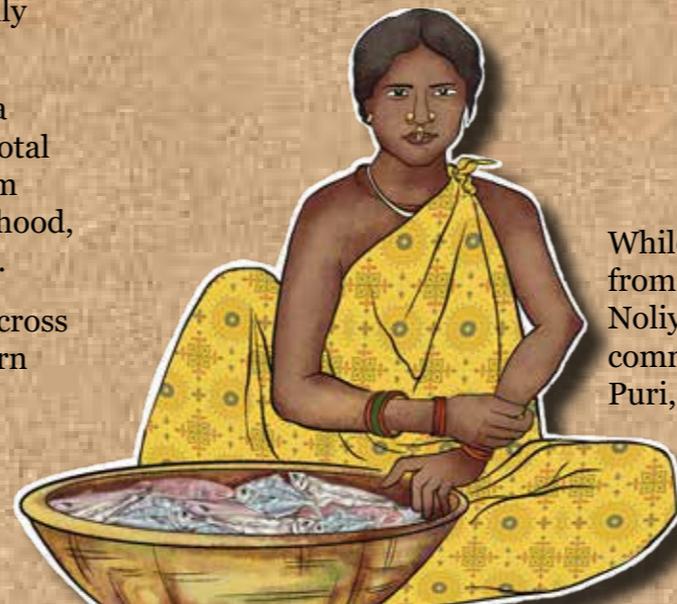


Croaker Fish

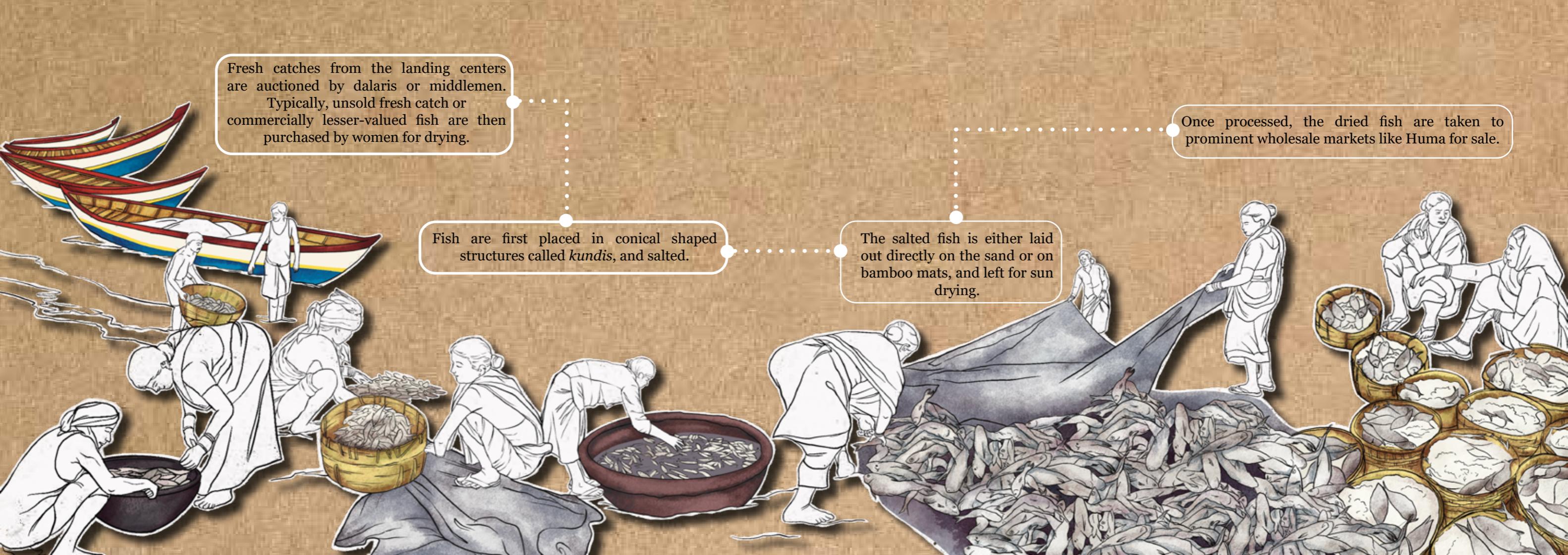


Pony Fish

Commonly dried fish species in Odisha



While men carry out small-scale fishing, the remaining activities, from dried fish processing to trade, are primarily managed by Noliya women. The Noliya are a Telugu-speaking traditional fishing community from the southern coast of Odisha, including Ganjam, Puri, and Paradeep.



Fresh catches from the landing centers are auctioned by dalaris or middlemen. Typically, unsold fresh catch or commercially lesser-valued fish are then purchased by women for drying.

Fish are first placed in conical shaped structures called *kundis*, and salted.

The salted fish is either laid out directly on the sand or on bamboo mats, and left for sun drying.

Once processed, the dried fish are taken to prominent wholesale markets like Huma for sale.

The largest dried fish market in Odisha, Huma, acts as a bustling trading hub for dried fish, with buyers and sellers pooling in from across different regions, including neighbouring states. Despite being a critical economic hub for the region, Huma faces significant challenges.



The hegemony of external traders reduces women's bargaining power and market access. In addition, storage is also a concern because of a lack of hygienic facilities, exposing products to contamination.

Weak market linkages, price volatility, lack of capacity for collectivisation, increase the marginalisation of the women in the dried fish sector. They also have to compete with fish meal factories, where low value dried fish is increasingly being diverted to make animal feed.

We aim to improve market linkages and support women dried fish producers in increasing their profit margins by facilitating the formation and management of Producer Groups (PGs). These groups bring together producers to collectively handle the production, procurement, and marketing of their products. The dried fish Producer Group will help enhance price realization for producers by reducing overhead costs, while simultaneously minimizing price inflation for end consumers by shortening the value chain. Our initiatives also focus on building capacity through training and entrepreneurial development to improve dried fish processing techniques, enhance product quality, and reduce wastage. Additionally, we aim to co-design climate-friendly, hygienic infrastructure with the communities. It will further address existing drying and storage challenges faced by women processing dried fish. Together, these interventions can build a sustainable, inclusive dried fish sector, supporting nutrition and livelihoods while fostering community resilience.

Through our initiative, we seek to co-create a scalable, community-driven model by strengthening women producers, enabling them to improve their livelihood opportunities and economic stability while simultaneously ensuring the nutritional security of many marginalized communities that depend on dried fish as an important source of protein and micronutrients.

