

DFM Newsletter

August 2020

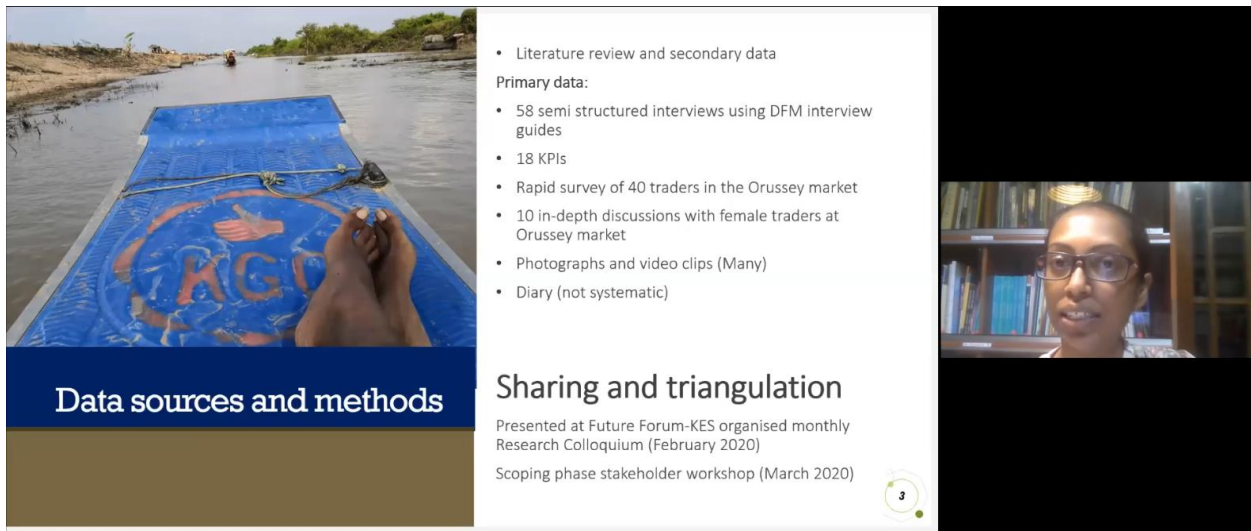
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DFM Cambodia scoping research webinar

Gayathri Lokuge presented a webinar on August 20 in which she shared the methods and results of the DFM Cambodia scoping research. We extend our thanks to Gayathri along with all our colleagues who have made the research in Cambodia possible. Many thanks in particular to Sereyvath Prak and collaborators at the Cambodian Institute for Research and Rural Development (CIRD), who helped Gayathri's research on the ground and have been important partners in the Dried Fish Matters project.

Gayathri's presentation summarized the scoping research on dried fish value chains that she recently completed over 5.5 months in Cambodia. Gayathri conducted a literature review, 58 semi-structured interviews using DFM interview guides, 18 key person interviews, a rapid survey of traders at the Orussey market, and 10 in-depth interviews with female traders.



Data sources and methods

- Literature review and secondary data

Primary data:

- 58 semi structured interviews using DFM interview guides
- 18 KPIs
- Rapid survey of 40 traders in the Orussey market
- 10 in-depth discussions with female traders at Orussey market
- Photographs and video clips (Many)
- Diary (not systematic)

Sharing and triangulation

Presented at Future Forum-KES organised monthly Research Colloquium (February 2020)

Scoping phase stakeholder workshop (March 2020)

Scene from the DFM Cambodia scoping research webinar, presented by Gayathri Lokuge

Existing quantitative data on dried fish in Cambodia indicate annual inland processing volumes of approximately 70 kilotonnes, but do not generally distinguish between wild fish and aquaculture sources. Gayathri noted that the large flows of fish within Cambodia, and bidirectionally across borders with Thailand and Vietnam, are relatively under-represented in official data and under-explored by researchers. Gayathri additionally highlighted the importance of Cambodian women's labour in both fish processing and wholesale trade, which contrasts to the more limited range of activities in this sector for women in locations such as Sri Lanka. Other areas for follow-up investigation noted in the webinar include: the role and activities of medium and large-scale producers; shifts between fish production and agriculture in response to changing ecological conditions, notably late rainfall and floods; and the ethnic dimensions of the dried fish economy, which includes labour from migrant and minority communities, as well as quality expectations associated with imported Vietnamese fish.

We are working to share the anonymized primary data from the Cambodia scoping research through our institutional repository, prior to the DFM coding webinar planned for October.

For those of you who missed the webinar, there is a recording now available on our YouTube channel here: <https://youtu.be/9Z71CMOdraw>.



Rapid survey analysis: Processed fish buying routes (green) and selling routes (blue) by traders at the Orussey market, Phnom Penh, Cambodia

The [slides for Gayathri's presentation](#) have been posted to the DFM Zotero library, within the collection "[*DFM Reports and Publications](#)". Please sign in to Zotero to download this document and other resources from the DFM library.

Zotero library and literature reviews

Several of our teams have begun collecting local research materials concerning dried fish within the Zotero library. We look forward to seeing this online research database grow over the coming weeks and months.

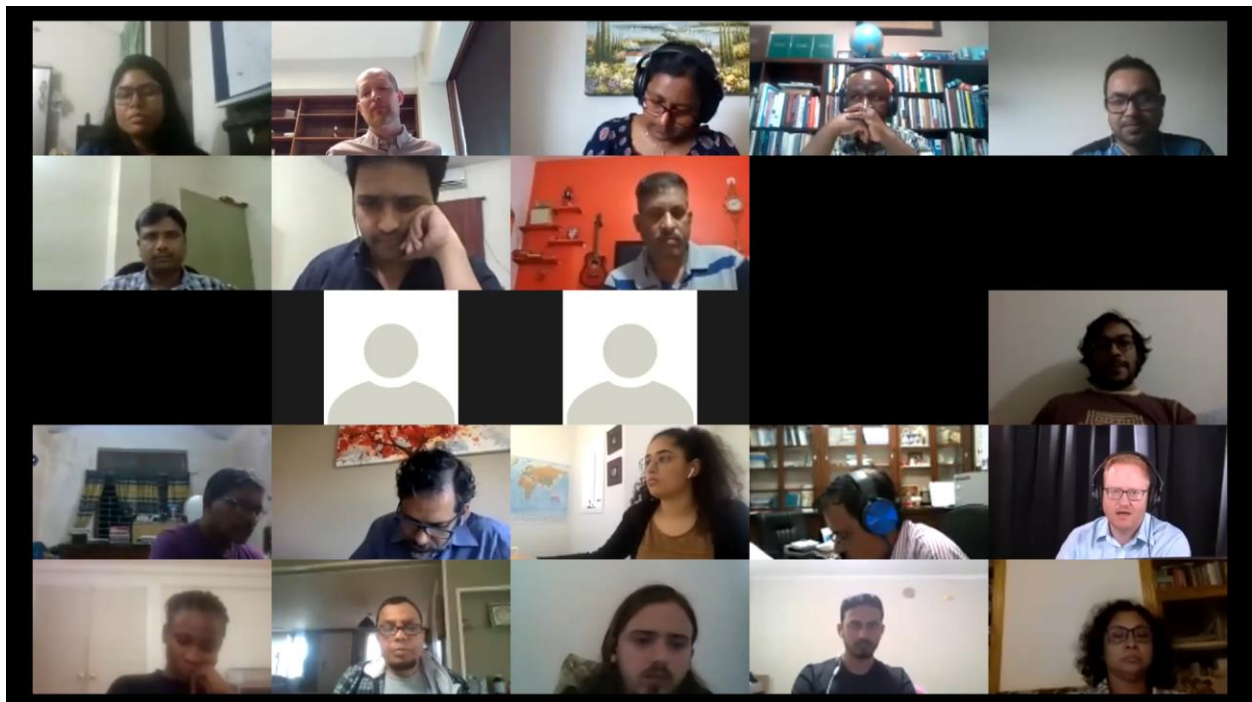
Derek Johnson hosted a webinar on the Zotero library on July 9, in which he provided an overview of the literature review process within the scope of DFM and introduced some of the functions of the Zotero reference manager. The Zotero platform allows us to collaborate in building a shared database of

resources concerning dried fish that can be tagged, searched, cited, and shared across our teams.

Derek noted that our literature reviews are intended to be a dynamic process that will encompass (1) a project-level, global review identifying major themes in the dried fish literature; (2) country-level or sub-country reviews that will examine each country literature in more depth; and (3) thematic reviews particularly by students, but also by cross-cutting teams in areas like nutrition or gender.

"This is not something that can simply proceed in a linear fashion but where you need to be open to possibilities of surprise – to the emergent qualities of this process – and I really think it's those emerging qualities of the literature review process that reveal the deeper insights about some of the key messages and key gaps that exist in the literature." – Derek Johnson

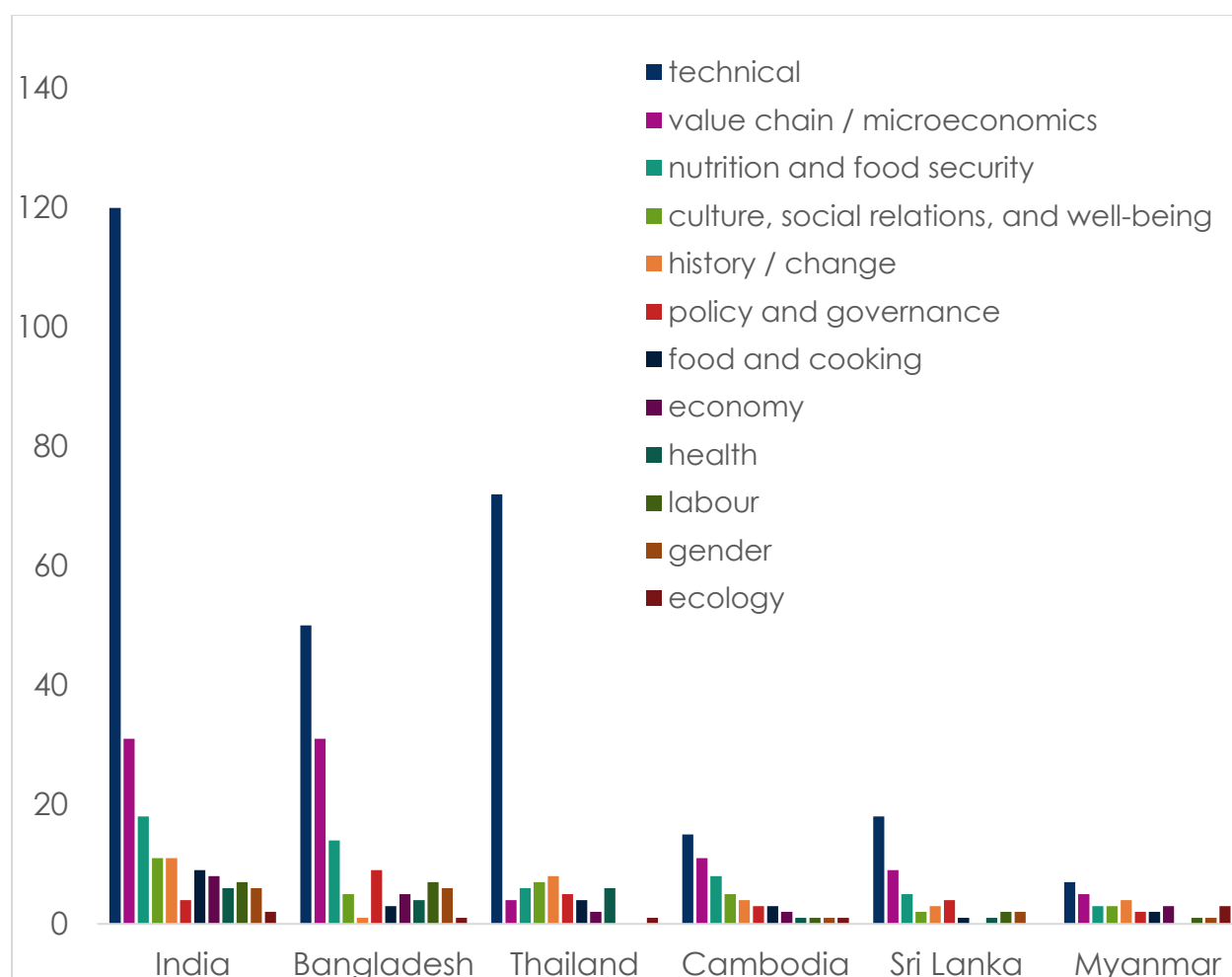
The video of this webinar was shared with participants on OneDrive, but to improve accessibility we have [added a copy to our YouTube channel](#) and have [listed it in the Zotero library](#) as well.



Scene from the DFM Zotero webinar, presented by Derek Johnson

We have also created an updated reference document to get you started using Zotero, available within the DFM library itself under the title “[DFM Help: Zotero web library](#)”. This document addresses many of the features described in the webinar, providing screenshots to the online (web library) version of Zotero that can be accessed anywhere – including on shared or mobile devices.

Derek’s webinar presentation touched on the thematic differences in literature related to the various DFM focus countries. In countries such as India and Thailand there is a fairly strong representation of technical studies addressing topics such as dried fish processing improvements, food safety, and nutritional quality. Elsewhere, as in Cambodia and Myanmar, the literature is more balanced. Bangladesh and Cambodia are quite striking in the relative emphasis on the economic dimensions of dried fish.



Number of references by theme and by DFM focus country

As Derek noted, when interacting with the DFM Zotero library, you will see various prefixed keyword tags that have been developed as part of the purposes of our global literature review. These include:

- thematic tags (e.g., [#THEME: nutrition and food security](#)),
- relevance tags ([#RELEVANCE: Direct](#) and [#RELEVANCE: Indirect](#)),
- geographic tags (e.g., [*Cambodia](#), [**SOUTH-EAST-ASIA](#)), and
- product tags (e.g., [+dried fish](#), [+smoked fish](#)).

We invite everyone to explore these tags and, as part of the local literature review process, apply them to any new resources you add to the DFM library if you wish. Feel free to add new tags to the database, but please refrain from deleting existing tags. Descriptions of the most important tags are provided in the document "[DFM Guideline: Zotero tags](#)", available within the DFM library itself.

Derek and colleagues will follow up with an invitation to comment on the findings of our global literature review.

Joining the DFM Zotero group

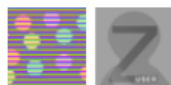
If you are not yet registered as a member of the Dried Fish Matters Zotero group, you can join by taking the following steps.

1. Sign in to Zotero, or create an account if you do not yet have one:
<https://www.zotero.org/user/login>
2. Visit the description page for our group:
https://www.zotero.org/groups/2183860/dried_fish_matters/
3. Click/tap on the red button marked "Join" (located just below the group description, as seen in the screenshot below).

Registered: 2015-08-08
Type: Public
Membership: Closed
Library Access: You can only view

Join

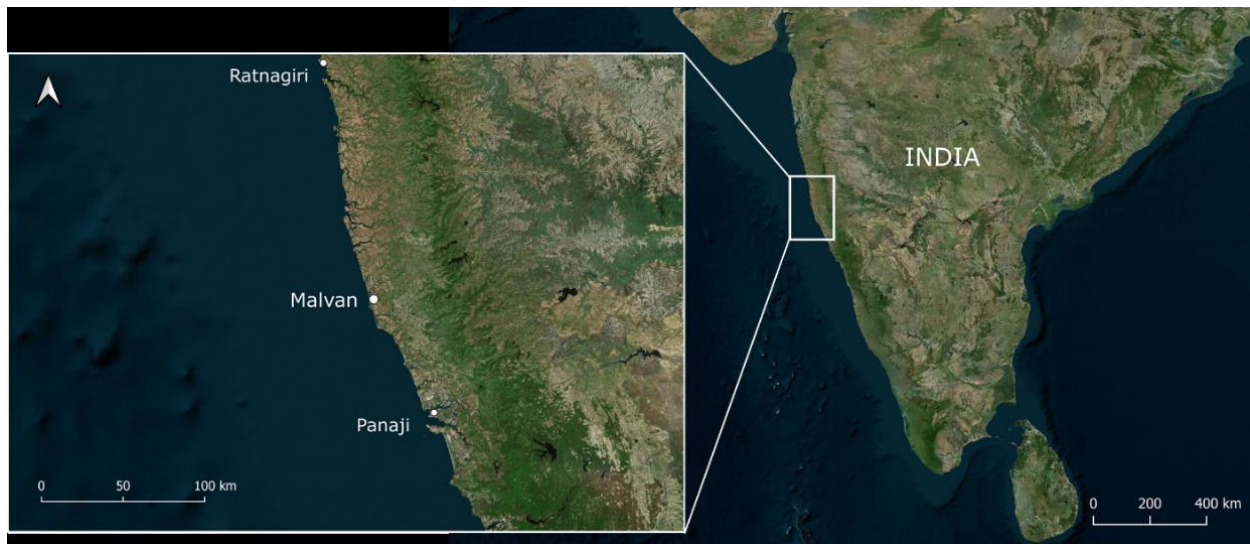
[Members \(2\)](#)



We may already have pre-authorized your membership based on the email address we have on file for you. If you are using a new account or a different email address, you may need to wait for us to approve your group membership manually.

New report on the dried fish industry of Malvan

The Dakshin Foundation, in cooperation with DFM, has recently released a report entitled ["The Dried Fish Industry of Malvan: Supply chain, economy and relationship with the fishmeal industry"](#).



Location of Malvan, India (Bing Maps)

The fishmeal industry is one potential threat to the dried fish industry, where large volumes of low-value fish are processed on a large scale to produce feed for poultry and aquaculture. This pilot study, conducted jointly by Dakshin Foundation and the Dried Fish Matters (DFM) project, assessed the structure, supply chain and trends of the dried fish economy at Malvan, Maharashtra and its possible links with the fishmeal industry.

The dried fish industry in Malvan is relatively small, with about 20-25 local traders and 8-10 traders who do not belong to the local communities – all of whom carry out the fish processing and drying themselves. These traders buy and process large volumes of fish, which is sold outside Malvan but within the region (i.e. Sindhudurg district and Goa). A separate chain exists where small-scale traders, largely women, buy fish from boats and sell it at the local market, both fresh and dried. A large diversity of fish is used for drying, the most common

being mackerels, croakers and ribbonfish, with traders and retailers showing no preference for any.

Fish catch in Malvan has significantly declined in the past decade, reducing the dried fish trade as well. Overfishing and prevalence of fishing practices such as LED fishing and high-speed trawling were cited as the main reasons for this decline. Dried fish trade is possibly further diminished by the development of the fishmeal industry. The authors of this report found that fish for drying may be increasingly diverted to fishmeal, as the latter is less labour-intensive and generates steady profits. The future of fish drying therefore appears to be under threat, largely due to a low and unsteady supply of fish and potentially due to industries like fishmeal as well.

COVID-19 and DFM research

As mentioned in our previous newsletter, scoping research has begun in most sites but field visits are now on hold due to the COVID-19 outbreak.

Our funding agency, SSHRC, has recognized the challenges presented by this pandemic and will accommodate some changes to our original project plans and deliverables. We have acknowledged requests from research teams to extend scheduled timelines in recognition of the suspension of field research.

We intend to discuss the impacts of COVID-19 on DFM research at our next scheduled webinar (see announcement below).

Extensions of the scoping research in India: Karnataka



Location of Karnataka in India. (SOURCE: <https://commons.wikimedia.org/wiki/File:IN-KA.svg>)

As mentioned in the previous newsletter, research in India has been extended to four new states.

We would like to introduce the proposed scoping research in Karnataka, to be headed by Dr. Amalendu Jyothishi, Dr. Priya Gupta, and Dr. Ramachandran Bhatta at Azim Premji University.

Amalendu and colleagues will be exploring the dried fish value chain in the context of the Karnataka coast, especially between Mangalore and Karwar. They have identified several factors that have led to a decline in dried fish consumption, including:

- Dried fish is not seen as an aspirational food and hence is substituted with other alternative food items as income increases or other substitutes become more readily available and affordable.
- Dried fish is being perceived as an unhealthy food as it contains high amount of salt.
- Quality concerns deter people from consuming dried fish.
- Stable availability of dried fish is declining, making it an unattractive food item.



Training of NETFISH enumerators on data collection, sampling methods, and ethics (Karnataka, July 2020)

On the supply side, the Karnataka team note that the dried fish value chain competes directly, and often unsuccessfully, with the fresh fish value chain. Dried fish tends to lose out due to its informal, unorganized, and small-scale nature – in contrast to the large-scale industrial mode of production of other competitors of landed fish. Fish drying is additionally threatened by the loss of common land, used for drying activities, due to coastal grabbing.

We look forward to learning more about the specific features of the dried fish economy in this region of India.

As noted in their recent [activity report](#), the Karnataka team has already completed a secondary data analysis and organized two meetings – a stakeholder workshop with 30 women dried fish processors and a training workshop with enumerators from NETFISH.

Upcoming meetings and webinars

Please take note of the following scheduled meetings for DFM team members. All meetings are tentatively scheduled for 13:00 UTC (08:00 Manitoba, 18:30 India & Sri Lanka, 19:00 Bangladesh, 20:00 Cambodia, Myanmar, & Thailand, 21:00 Malaysia)

- **September 24:** Status meeting with research teams

This will be a meeting to present status updates from each of the country research teams and discuss the impact of COVID-19 on our project and timelines. We also plan to discuss forming several thematic working groups on key areas of project interest such as nutrition security and analysis of secondary datasets.

- **October (date TBA):** Webinar on Qualitative Data Analysis using NVivo

We are expecting to be able to provide NVivo software licenses, and support use of this program by project teams, to permit data sharing and the analysis of cross-cutting themes. This webinar will focus on implementing harmonized coding and data sharing practices.

DFM Communications

Our project communications channels are listed below.

Email: Dried.Fish.Matters@umanitoba.ca

Website: <http://driedfishmatters.org/>

Twitter: <https://twitter.com/DriedFishUM>

Email list: <http://lists.umanitoba.ca/mailman/listinfo/dried-fish-matters>

YouTube: https://www.youtube.com/channel/UCszSWej3Z4zl-wx_MWxL2RA

Zotero: https://www.zotero.org/groups/2183860/dried_fish_matters/library

OneDrive: https://1drv.ms/f/s!Ao5UHK58h7dl71yxW5F2jBxN_8JZ
(read-only link for shared working documents)

Please mail your photos and information to dried.fish.matters@umanitoba.ca for uploading on our website or inclusion in the next newsletter.