



Dried Fish Matters

Cambodia Scoping Workshop
3rd March 2020, Phnom Penh



Social Sciences and Humanities
Research Council of Canada

Conseil de recherches en
sciences humaines du Canada

Canada



DFM Cambodia

Scoping phase

The focus of the scoping phase:

Existing literature and gaps, processed products, value chain actors, production and trade, contribution to livelihoods and food security, governance and policy and links with broader geo-politics and development

Research activities

October 2019 to March 2020

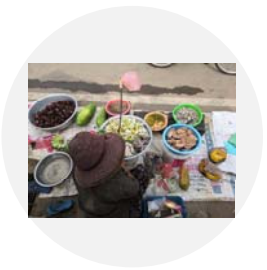
Literature review and secondary data

Primary data: 58 semi structured interviews, 18 KPIs, survey of 40 traders in Orussey market, 10 in-depth discussions with female traders at Orussey market

Definition of 'dried' fish in Cambodia?



Does dried fish matter in Cambodia?



Economy

Estimated 6 million as temporary, permanent and seasonal

GDP contribution of fisheries 8-10%



Food Culture Nutrition

3.55kg of fresh fish and 0.56 of Prahoc consumed per week per household

Fish and fish based foods provide 70-75% of protein intake for Cambodians



Sustainable Development

Connectivity to the Mekong reduced by 31% and predictions for 4-40% of fish catch decrease



Governance

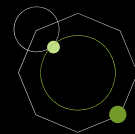
516 Community fisheries established by 2018

53% out of total full time fishers are women





Economy

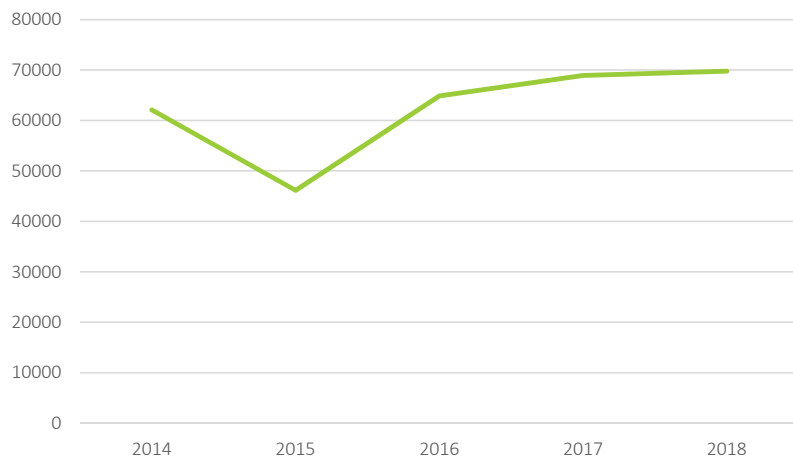


From published studies

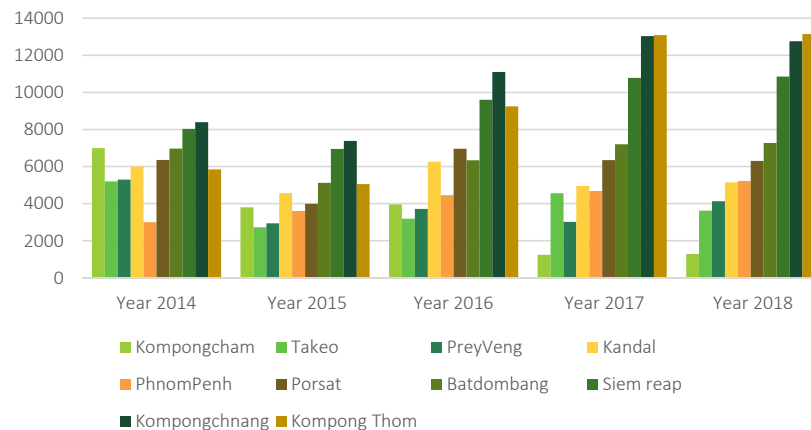
- Value chains of specific fish species- Ex: Snakehead and low value fish
- Socio-economic characteristics of those who engage in fishing, fish processors and traders
 - Role played by women, gendered livelihood
 - Labour arrangements including family labour
 - Value added through processing
 - Costs involved in processing and profits generated at the household level
- Secondary data on volume of production, number of processors



Inland processed product volume 2014-2018



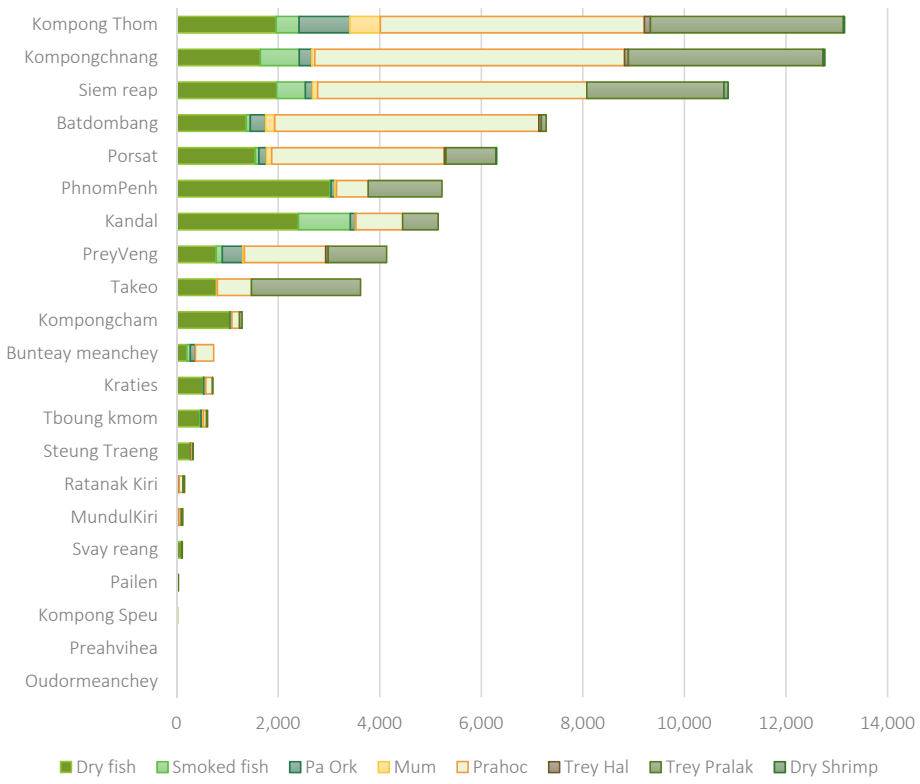
Inland processed product volumes 2014-2015-by Province



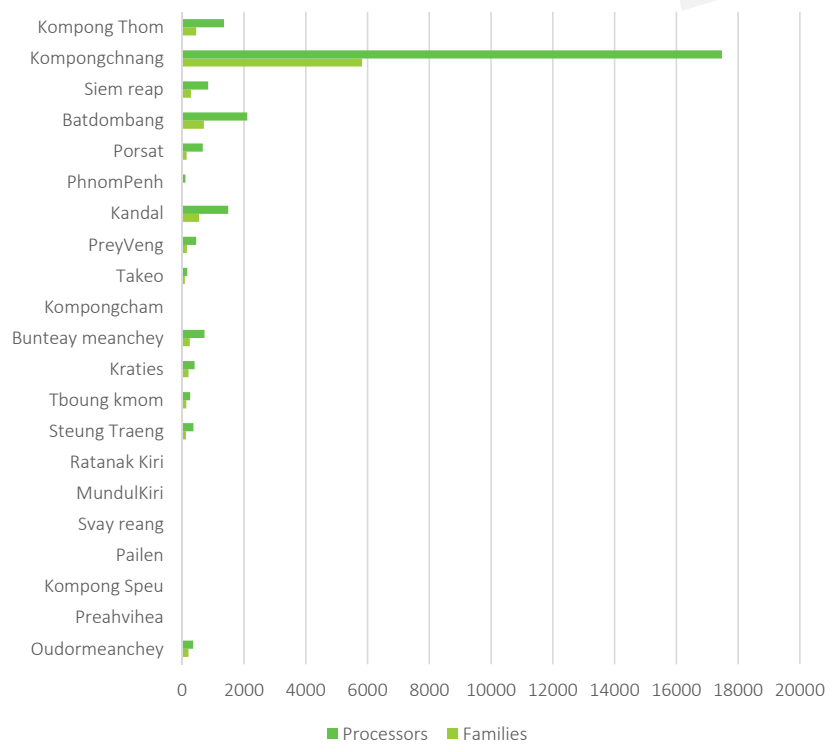
Source: Derived based on Fisheries Administration 2018

Secondary data

Inland Processed Fish Products 2018-by Province



Number of inland processing families and processors-2018



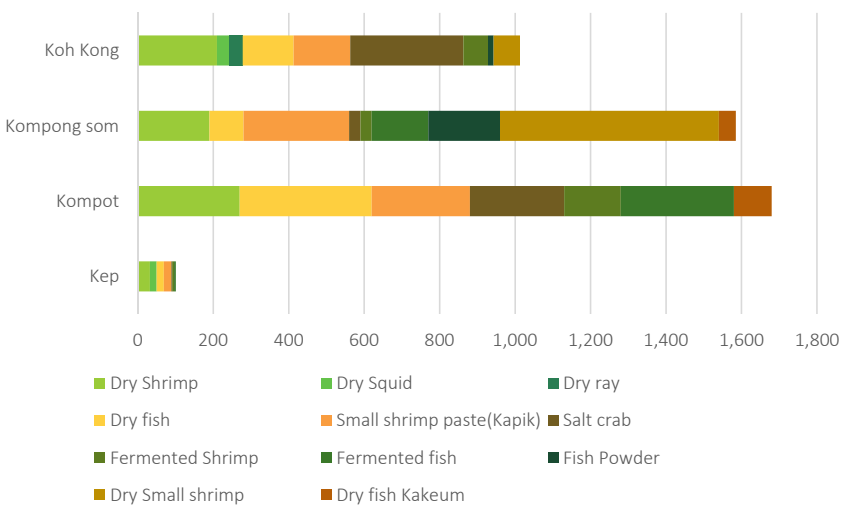
Source: Derived based on Fisheries Administration 2018



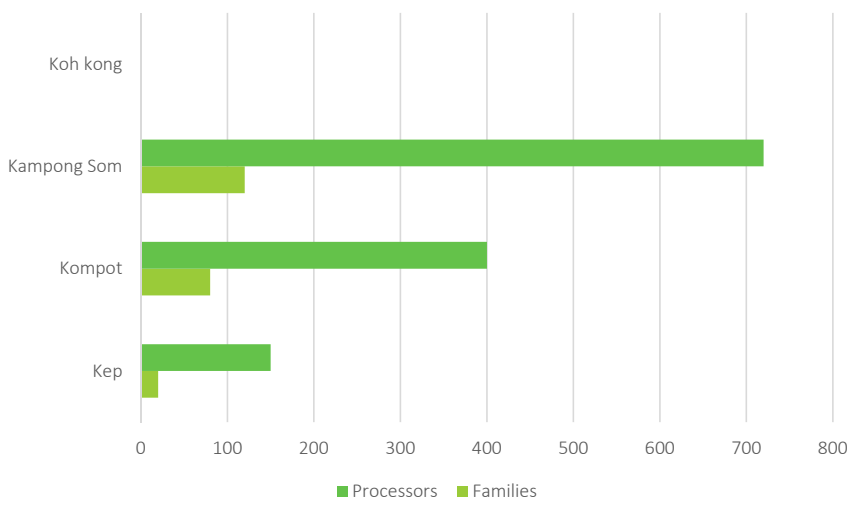
Secondary data



Processed marine products 2018-by Province



Number of processors-Marine sector-2018



Source: Derived based on Fisheries Administration 2018



Knowledge gaps and questions

- Marine fishing based products
- Commercialised processing plants
- Engagement of women and children
- Inter-generational knowledge, skills and contacts transfer
- Sourcing of fresh fish for processing
 - Proportions of wild fish, aquaculture and rice field fisheries
- Trade of processed fish- how do processed products flow within the country and cross-border

Findings: Diverse range of actors in the value chain

Type of processor	Characteristics
Fishing families	'Worse off' households who use processing as a secondary income source for the family (ex: elderly women supporting themselves, and their family through fish processing). Processing happens at home, primarily by household member/s. Processed fish volume is less than 100kg per day during the peak season. Products are mostly sold to consumers in the village. (household/small scale)
	Households with a steady income from fishing or engaging in fishing but primary income being from another source such as remittances, engaging in processing as a secondary livelihood activity. Processing happens at home by household member/s mainly and in the peak season, with 1-3 hired workers. Products are traded within the village and sold to middlemen. (household/small scale)
Fishing cum farming families	Farming primarily in small islands on the water bodies, during the season.
Farming families	Subsistence purposes only
	Subsistence purposes mainly, but sells a certain proportion based on surplus production
Processing families	Households with no members involved in fishing or farming. (small to medium scale). Processing happens at home, involving household members and hired labour during peak season.
	Households with no members involved in fishing or farming, processing or semi-processing plants located in a separate location from their homes. (small to medium scale). Volume of production per day is 800kg-10Tonnes per day during peak season. At least some of the fish species are sourced from Thailand/Vietnam and the rest from floating villages around the Tonle Sap lake. Products are sold to middlemen/traders within the Province and outside the Province, including Phnom Penh markets. (Ex: processors at Battambang Psar Prahoc)
Processing factories	Primarily in Phnom Penh and Sihanouk, employing 40-60 workers, 80% women



Diverse groups

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Range of labour arrangements

Type of processed product	Type of processing activity	Payment term	Payment value	Comments
Semi processed fish paste	Cutting head, gutting and cleaning	Per kilogram	300r (0.75USD)	Approximately 100kg processed per day per worker (BT PR 01)
Pa Ork	Mixing with salt	Per tonne	30,000r (7.50USD)	Approximately 3-4 tonnes processed per day per worker (BT PR 03)
Smoked fish	Cleaning fish and smoking	Per day	40,000r (10USD)	They work throughout the year
Dried prawns	Cleaning prawns	Per vat/container	9,000r (1.75USD)	8-10 vats of prawns cleaned per day per worker (KP PR 01)
	Cleaning prawns	For 2-3 hours per day	10,000r (2.50USD)	

Processed fish selling sources (blue) and buying sources (green) by traders at provincial and district markets

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Source: Primary data-DFM Cambodia Scoping study



Processed fish buying routes (green) and selling routes (blue) by traders at the Orussey market





Food culture and nutrition

From published studies

- Historical tradition of processed fish consumption of Cambodians
 - Fermented fish as an important part of the diet of the Southeast Asians in general and of Cambodians
 - Historical origin and diffusion of fermented fish in the Southeast Asian region linked to people's movements
 - Close links with rice farming and the need to preserve for lean fishing periods
 - Exchange practices of unhusked rice and fish/processed fish
- Chemical and microbial make-up of processed products
- Nutrition value of processed products
- Potential of locally developed products as nutrition supplements

Knowledge gaps and questions

- Changing food consumption preferences/tastes and practices among Cambodians
- Nutritional value of traditional processed products apart from Prahoc etc.
- Food safety and hygiene issues
 - Technology transfer

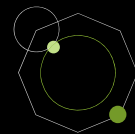


Scoping phase findings

- Processors and traders concerned regarding quality and food safety
- Clear preferences for processed products based on wild caught fish and not fish from aquaculture
- Changing consumer demand of processed products, that may have health and food safety related impacts-food colouring
- Sourcing Provinces- Kampot for Yahe and Kampong Chhnang for smoked fish, Battambang, Siem Reap and Kandal for Prahoc, Koh Kong for Dried shrimp



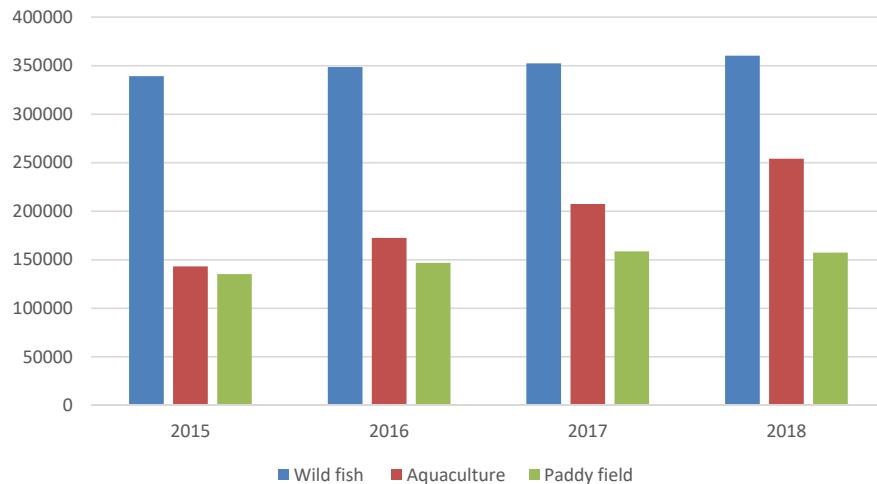
Sustainable development



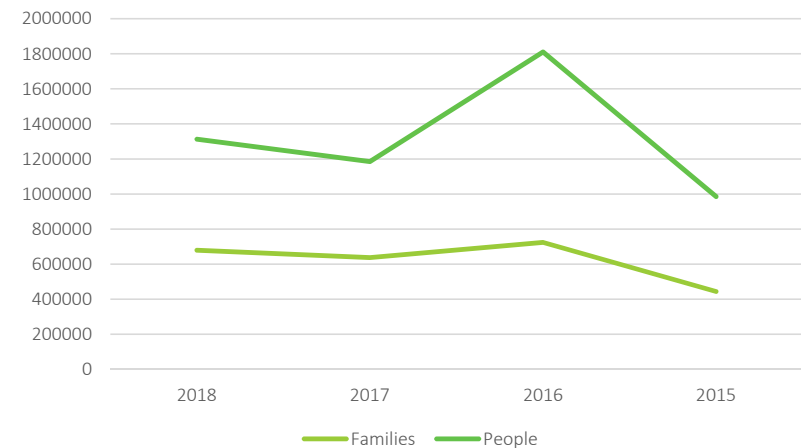
From published studies

- Impact of development/energy needs and declining fish catches
- Over-exploitation
- Potential loss of nutrition due to dams
- Climate change and fisheries related livelihoods, low adaptive capacities

National fish production 2015-2018



Active fisher families and fishers 2015 - 2018



Source: Derived based on Fisheries Administration 2018

- Decrease in certain types of fish, and catch per unit and impact on nutrition and food security provided by processed fish
- The role of aquaculture
- Climate change and impacts on processed fish livelihoods, food security
- Role of tourism

Knowledge gaps and questions





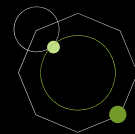
Scoping phase findings

- Low catch- dai catch especially
- Increasing use of aquaculture fish as fresh fish input-
- Tourism and increasing/decreasing demand
- Out-migration for non-fishing jobs
- Displacement and resettlement of processors out of floating villages





Governance



From published studies

- Community fisheries, co-management of fisheries in general, but not on processed products
- Policy that focuses on quality and institutional structures for processing planned and implemented, but sustainability maybe a concern
 - Cambodian Standard for Prahoc

Knowledge gaps and questions

- Inter-development sector coordination and synergies towards policy coherence
- Role of community fisheries in processing
- Women's voices be better included in policy, governance and practice
- Minimum learning of experience from Development projects that target fish processing





Scoping phase findings


- Relative absence of collectives/producer groups
- Minimum interaction with government
- 'One Village One Product' programme
- Market fee, rent and market management
- Lack of mechanisms for conflict resolution and mediation within markets
- Informal nature of 'contracts'
- Lack of formal insurance

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Thank You

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