

Dried Fish Matters- Cambodia

Scoping phase report

Outline (with suggested revisions) to be discussed on the 27th May 2021 with Derek and Eric

Note: the yellow highlights are new additions based on comments received so far and would be good to discuss

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Executive summary

1. Introduction

- Brief overview of DFM project (Eric/Derek please point me towards the best source to extract this)
- Introduction to the dried fish sector in Cambodia: important source of livelihood, food security and nutrition
- Summary of what is 'known' about the dried fish sector in Cambodia and the gaps in knowledge
- What is 'dried fish in Cambodia': Definitions deriving primarily from empirical observations on how fish is processed and stored
- Summary of social economy approach to value chains of DFM (added as per suggestions made by Derek)
 - short statement of the structure, conduct, performance approach (Derek/Eric, please point me towards a document from which I could extract this)
- Structure of the report-per each segment of the value chain (fish production, fish processing and processed product marketing-wholesale and retail)
 - Overview about the actors, products and locations;
 - Overview of how production/processing/trading operates (is conducted)
 - Statement of change, successes, and problems in each segment.
- Definitions of actors in the value chain (As suggested by Ben) based on primary data from Cambodia
 - Potential actors include producers/fishers, processors, collectors/brokers/marketing intermediary etc.
- Phases/steps of DFM Cambodia research (initial visit to Cambodia, five month stay of data collection etc.)
- Introduction to the DFM Cambodia team and contributions made by different organisations and persons

2. Methods and data sources

- Introduction to methods proposed to be used by DFM (Derek/Eric, I feel it would be good to add a brief intro here and situate the Cambodia method choices within this, if you agree this is a good section to have, please let me know from where I can extract this)
- Introduction to the methods and data sources used in DFM Cambodia
- Listing of data sources used for DFM Cambodia research
- Respondent and location selection and sampling
 - Summary table followed by brief descriptions on the rationale for methods used
 - Maps of data collection locations (Can these maps be reproduced with DFM central support?)
- Challenges during scoping phase and limitations
- Data analysis process

3. Summary of literature review

(specific references to be included throughout this sub-section as suggested in comments, Derek/Eric apart from this, does this particular section need any other changes? As per Derek's suggestion, the main points highlighted here could be taken up again at the conclusions in relation to the analysis/findings presented in the report: either as contributing to published lit or addressing gaps)

- Overview of published literature and gaps
- Description of published studies
- Description of gaps in literature

4. Findings

- Overview of the processing sector in Cambodia (this sub-heading needs to be added in the revisions)
 - Main fish processing sites in Cambodia
 - Overview of types of processed products and species used (Derek had suggested to move this to the processing section, but I feel it is important to lay this out at the beginning, so that people have an idea about the wide range of products being produced, as they go through the findings section)
 - Brief overview of composition of processed products in Cambodia (based on secondary quantitative data from FiA)
- Fisheries from which processed products originate
 - Fresh fish production in Cambodia
 - Source locations by Province for wild caught fish, source locations by Province for aquaculture
 - *Rapidly diminishing freshwater wild fish catch and fish farming as a response* - including pointing to gap in data (if I am to go with the structure proposed by

Derek, this sub-section should move to the end of this section on fishers, would be good to discuss this please)

- Fishers, their families and communities (As per structure suggested by Derek, this should move to the start of this section on fishing)
 - Where do they live, migration patterns and future plans
 - *Identities of fishers (Khmer/Vietnamese, Muslim)*
 - *Where is the fish going-linking up with the next segment on processing, and stating that no clear flows of fish could be identified, as a gap*
- Fish processing sites, processors and their practices
 - Introduction para on the structure of the sub-section- including explanation as to why the processing sites are presented following the secondary data, in response to comment made by Derek. The description of processing sites are included to provide a sense of the diversity of space/locations used to produce these products, often with location specific specialization as well and the difference in scales.
 - Estimates of volumes of dried fish products produced and traded- secondary data from FiA
 - Fish processing sites: floating villages, urban neighbourhoods and coastal communities
 - Bagnet fishing for small-scale Prahoc processing
 - Small-scale Prahoc processing on the Mekong in Kandal
 - Semi-processed Prahoc in Battambang for export to Thailand
 - Box on medium scale factory engaged in semi-processing Prahoc
 - Smoked fish processing in floating villages and 'resettled' villages
 - Psar Prahoc in Battambang and processing of fermented fish
 - Sea food processing in coastal villages including islands
 - Seasonality in processing and fresh fish sourcing (Titled suggested by Derek-Background on seasonality and supply to make it clearer as to why supply is discussed in this section)
 - Fish supply for processing is decided by the monsoon in the fresh water sub-sector
 - Sourcing routes by scale of production and points to a gap in data on exports of fresh fish for processing
 - Processing methods, ingredients used and associated costs
 - Processing methods, ingredients used, preparation/dishes (where information available), costs of ingredients and photographs of products/processing presented by product
 - Ben's comment-Could we give each product a separate page so that the images can be a bit bigger? Could maybe add information about size of operations, main sites of production, gender of people involved in processing. Etc- size of operations and main sites of production are presented in the section above on fish processing sites and the labour arrangements in the section below: if I am to address Ben's comment, all these three sections will have to be combined I feel. While I feel the value in this combining for a separate output, I feel for the report, what we have now makes better sense?
 - Labour arrangements: Ownership, paid labour and family labour
 - By processed product type

- Quality of fish used for processing
 - Preference for processed products from wild caught fish, for products from locally farmed fish
 - *Processed product marketing routes and strategies- transport mode decided based on weight and gap in role of social networks in marketing*
- Fish processors (as per structure suggested by Derek, this sub-section and the typology below should move to the start of this section on processing)
 - Secondary quantitative data on number of processors/families by Province based on FiA data
- Typology of fish based product processors: link with MSMEs
- *Gendered and generational processing practices*
- *Relocation on 'land' and impact on fish based livelihoods*
- *Past, present and future of processing: processor perceptions*
- Markets, traders and their practices
 - Overview para on sales routes
 - Sales to consumers at home or in village/district markets
 - Trade through organised markets
 - Organisation of processed fish markets- list of markets visited and number of stalls, Orussey market and other market physical space distribution
 - Types of products and volumes sold- what is sold where, types of products sold in Orussey, seasonal trends-if any-in products sold by type at Orussey
 - Demand and seasonality in sales of processed products
 - *Migration for work and demand for processed fish products*
 - *Tourism, diaspora and processed fish products*
 - *Changing consumer demand and potential links with food safety and health*
 - Trade routes for processed fish- mapping of movement of processed products at district markets and Orussey (perhaps best to be combined with the section above on trade through markets)
 - Exports of processed products-gap in data
 - Selling prices of processed products- table that shows price variation
 - Traders, trade histories and trade practices (should be moved to the top of this sub-section, as per structure proposed by Derek)
 - Overview of traders, by type of traders and locations of selling
 - Business and trade history
 - *Who are the processed fish traders in Cambodia* (comment by Derek to combine this with the section immediately above this)
 - Middlemen (should be moved to the top of this sub-section, as per structure proposed by Derek)
 - Mooi

5. Conclusion

To be done- suggestion by Derek- The conclusion would need to have a statement of how your research comes together overall to provide a picture of the social economy of dried fish in Cambodia. You could show how your research addresses existing gaps in the literature, adds valuable new insights, but also flags key gaps and questions for follow up research.