



# Cambodia Export Diversification and Expansion Program: Marine Fishery component

Progress Updates

January 5, 2016

# Implementation of ES/TFM recommendations dated July 2015

	Recommendation	Status as of December 2015	Description
1	The MIEs should work closely with DICO and relevant line Ministries to strengthen the participation of core team in the implementation and M&E of CEDEP II. A clear TOR and shared work plan between core team members and MIEs should be agreed upon.	On-going	Core team were engaged in all project activities, for instance validation workshop on value chain study, fishery-related standards assessment and environmental impact assessment, project steering committee meeting.
2	Due to different starting time and implementation pace of each component, it is recommended that the timing and modality of Mid-term evaluation of CEDEP II should be further discussed and agreed upon between DICO, MIEs, ES and TFM.	???	Next mid-term evaluation will be in first quarter of 2016.
3	It is recommended that UNIDO works closely with DICO and other implementing partners to speed up the implementation of the fishery component of CEDEP II. Project technical progress reports should be submitted timely to the Project Steering Committee for endorsement and subsequently to ES, TFM and DICO for review and clearance.	On-going	First and second narrative report was endorsed by Project Steering Committee during its semi-annual meeting in September 2015.  2 narrative reports have been submitted to ES, TFM and DICO.

# Progress against work plan at a glance

Outcome/Outputs	Activities	Status
<p>Outcome 1: The needs of the marine fisheries product export sector are better understood, restructuring of the sector to better focus the policy dialogue with the government is piloted in three target provinces and the enabling business environment is improved</p>		
<p>Output 1: An agenda of key issues for the marine fishery product processors and exporters sector is identified, and mitigation proposals developed (including but not limited to, harvest supply, linkages between supply and processors; availability of standards; SPS needs; environmental issues; export opportunities; cold chain infrastructure; legal framework, etc.)</p>	<p>I.I.I Agenda of issues specific to sector identified and work plan developed to address those</p>	<p>done</p>
<p>Output 2: Basic studies of the marine fisheries product value chain and target export markets are prepared with a strong focus on small and middle-sized processors. The studies focus on key components of the export value chain including identification of potential export market, SPS requirements for key export markets, and capacity building need</p>	<p>I.II.I Value chain sector study and capacity building assessment prepared</p>	<p>Done</p>
	<p>I.II.II Value Chain study and needs assessment translated into Khmer</p>	<p>On-going</p>
	<p>I.II.III Findings from the Value Chain study and capacity need assessment shared with Government and DPs via the Fisheries Technical Working Group</p>	<p>On-going</p>

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<p>Outcome 1: The needs of the marine fisheries product export sector are better understood, restructuring of the sector to better focus the policy dialogue with the government is piloted in three target provinces and the enabling business environment is improved</p>		
<p>Output 2: Basic studies of the marine fisheries product value chain and target export markets are prepared with a strong focus on small and middle-sized processors. The studies focus on key components of the export value chain including identification of potential export market, SPS requirements for key export markets, and capacity building need</p>	<p>I.II.IV Value Chain study is disseminated through workshop(s). Processors and traders are trained into basic use of market analysis tools</p>	<p>On-going</p>
<p>Output 3: The current ISC and FiA standards for marine fishery products are reviewed and updated if/as needed</p>	<p>I.III.I ISC and FiA standards are reviewed. Need to update/develop standards as needed in collaboration with ISC/MIME officials identified</p>	<p>On-going</p>
	<p>I.III.II Workshop(s) organized to disseminate information about standards (standards are typically published in printed form in both Khmer and English and on web site too)</p>	<p>Not yet started</p>

# Progress against work plan at a glance

Outcome/Outputs	Activities	Status
<p>Outcome 1: The needs of the marine fisheries product export sector are better understood, restructuring of the sector to better focus the policy dialogue with the government is piloted in three target provinces and the enabling business environment is improved</p>		
<p>Output 4: An Apex Association is created and engaged in G-PSF discussions</p>	<p><b>I.IV.I</b> Regular consultations with existing producer associations held and constraints identified</p>	<p>On-going</p>
	<p><b>I.IV.II</b> Based on potential to establish Apex association, activities are identified and carried to help set up the association such as legal text, identification of specific services to be provided by the Association to its member, financial arrangements to ensure long term sustainability, etc.</p>	<p>On-going</p>
	<p><b>I.IV.III</b> Visit to Thai, Vietnamese, and possibly other Fisheries Associations are organized</p>	<p>Not yet started</p>
	<p><b>I.IV.IV</b> Based on capacity, project assist the associations in organizing an Apex association and in identifying ways to report on issues of the sector in the G-PSF</p>	<p>Not yet started</p>

# Progress against work plan at a glance

Outcome/Outputs	Activities	Status
Outcome# 2: A group of marine fisheries processors have become export ready and are increasing their export business including to new markets		
Output 1: The selected group of processors is supported through technical assistance to help reach SPS compliance (e.g. HACCP, GMP, packaging, etc.) with requirements of target markets.	II.I.I Survey of SPS needs carried out	Done
	II.I.II Workshops are organized to disseminate findings of SPS survey and develop implementation plan	Not yet started
	II.I.III Group training on SPS measures is organized for target groups of collectors/processors	Not yet started
	II.I.IV On-site training is organized at individual processor selected in target groups	Not yet started

# Progress against work plan at a glance

Outcome/Outputs	Activities	Status
Outcome# 2: A group of marine fisheries processors have become export ready and are increasing their export business including to new markets		
Output 2: Economically sustainable remedial solutions addressing negative environmental impacts of fish processing are implemented among firms in the selected group of processors, based on needs identified in through survey.	II.II.I Survey of environmental issues and mitigation needs carried out	Done
	II.II.II Workshops are organized to disseminate findings of environmental survey and develop implementation plan	On-going
	II.II.III Group training on environmental mitigation organized for target groups of collectors/processors	Not yet started

# Progress against work plan at a glance

Outcome/Outputs	Activities	Status
<p>Outcome# 2: A group of marine fisheries processors have become export ready and are increasing their export business including to new markets</p>		
<p>Output 3: Market development in a minimum of three new markets is facilitated among the pilot group of processors through technical assistance, including support in areas of trade facilitation, identification of new potential markets (through direct visit or participation to trade fairs, buyer-seller markets, etc.), improvement in packaging and branding requirements, etc.</p>	<p>II.III.I International expert for export development and marketing develop possible event calendar for trade missions and trade fairs</p>	<p>Not yet started</p>
	<p>II.III.II Overseas missions are organized and carried out</p>	<p>Not yet started</p>
	<p>II.III.III Debriefing/dissemination workshops are organized to follow up on overseas missions</p>	<p>Not yet started</p>
	<p>II.III.IV Manual on trade facilitation issues for export of marine fisheries products prepared; Trade facilitation manual translated into Khmer</p>	<p>On-going</p>
	<p>II.III.V Workshop(s) organized to disseminate information about trade facilitation among processors and traders</p>	<p>Not yet started</p>
	<p>II.III.VI Support is provided to help improve/introduce appropriate packaging for export markets</p>	<p>On-going</p>



# Progress against work plan at a glance

Outcome/Outputs	Activities	Status
<p>Outcome# 2: A group of marine fisheries processors have become export ready and are increasing their export business including to new markets</p>		
<p>Output 4: Lessons learned from Outputs under Outcome 2 are disseminated broadly to the larger community of producer associations in the three coastal areas</p>	<p><b>II.IV.I</b> Dissemination workshops for local producer associations to disseminate lessons learned from outputs and activities under Outcome 2</p>	<p>Not yet started</p>
	<p><b>II.IV.II</b> Fisheries TWG is informed about SPS, environmental needs, trade facilitation issues, market development, branding, and other issues of the sector identified through the project</p>	<p>On-going</p>
	<p><b>II.IV.III</b> Meetings with local and national media (press, radio, TV) to explain results and lessons learned from outputs and activities under Outcome 2</p>	<p>Not yet started</p>

# Key achievements

- Fishery related standard assessment completed. Lessons learned:
  - Fishery related standard are product standards which are not helpful for processors.
  - Process standards or codes of practice need to be developed
  - Legal framework to be improved (clearly designated and accredited Competent Authority, EU equivalent legislation, control procedure)



*July 2, 2015: Dissemination of standard assessment results held at UNDP office*

# Key achievements

- ▶ Marine fishery value chain assessment completed. Lesson learned:
  - ▶ Food safety: Insufficient and inappropriate use of ice at harvesting level (due to false belief, lack of weather info, lack of know-how); Quality of ice is still questionable (**risk-based management approach not adopted**); Lack of cold storage; Lack of driving forces for pushing quality improvement; high input price
  - ▶ Export: lack of export know-how among exporters, particularly on legal compliance



*June 24-25, 2015: Focus Group Discussion on marine fishery value chain held at Moon Julie Hotel, Preah Sihanouk province.*



*May 15-30, 2015: Field interview for value chain assessment*

# Key achievements

- Environmental impact assessment is on-going. Lesson learned:
  - Illegal/irresponsible fishing is main cause of environmental concerns
  - Pollution of water body is caused by residential activities rather than by processing facilities



# Key achievements

- ▶ Apex Association creation:
  - ▶ Key players identified (Young Entrepreneur Association of Cambodia, Department of Private Sector Development of the Ministry of Commerce, active processors, Fisheries Cantonments)
  - ▶ Working model of the association discussed





# Funding



➤ Total budget	USD 988,953
➤ Funds received	USD 800,000
➤ Funds spent	USD 470,445.99
➤ Funds available	USD 329,554.01



# 2016 planning

- ▶ Training on food safety/SPS requirements provided to processors
- ▶ Technical support provided to pilot processors to achieve HACCP certification
- ▶ Codes of practices (process standards) developed by ISC and disseminated to stakeholders
- ▶ Trade facilitation manual disseminated to processors/exporters
- ▶ Processors/exporters taken to trade fairs
- ▶ Fishery association formed



**Thank You!**