



Cambodia Export Diversification and Expansion Programme (CEDEP II): Marine Fisheries component

Progress of Activities
UNIDO

June 2016



Program: Expected Outcomes

The **Export of Marine Fisheries Products** component will focus on two main outcomes:

- The needs of the marine fisheries product export sector are better understood, the sector is better structured to dialogue with the Government, the policy environment for marine fisheries exports improves, and the enabling environment improves;
- A group of marine fisheries processors becomes export-ready and is increasing export business including to new markets;



Implementation approach

- Baseline study
- Issues identification
- Restructuring work plan
- Implementation



Support to Private Enterprises

- Key findings:
 - Marine fishery is almost entirely artisanal and traditional with no major domestic processing and exports
 - Food safety compliance among processors is poor due to lack of know-how, market pressure, and resources (finance and human)
 - Lack of export know-how among processors
 - Most of the export is informal due to lack of compliance in processing



- Action taken:
 - Three private enterprises were identified for implementation of HACCP to make them export ready
 - Drafted food safety compliance documents- Standard Operating Procedures (SOPs) and Sanitation Standards Operating Procedures (SSOPs) for the pilot processors
 - Refurbishment plan for 3 processors completed
 - Co-financing arrangements up to 50% is agreed in 3rd PSC
 - Letter of agreement drafted
 - Three processors agreed the letter of agreement in principle
 - Refurbishment is to going to be initiated soon
 - Export Manual was prepared; dissemination jointly organized with UNDP
- Future action
 - Implementation of SSOP and HACCP
 - Making the processors export ready through certification



Cambodian standards assessment and Development of Codes of Practices (CoPs)

- Key findings:
 - Few fishery related product standards been developed
 - Significant lapses were found in food product related standards in reference to food safety hazards and GMP requirements
- Actions taken:
 - Capacity building provided to ISC staffs to be ready for future standards development
 - Four process standards/Codes of Practices (fish sauce, dried shrimp, chilled crab meat and frozen shrimp) are being drafted by ISC
- Future action
 - Consultation between FiA and ISC on the draft CoPs
 - Finalization of CoPs



Apex association

- Key findings:
 - Existing associations are weak and need to be strengthened as they are foundation of apex association or federation to be created
 - Most of members of associations are small holders with limited know-how and resources to upgrade their facilities
 - Existing associations expect not only technical assistance but also financial assistance
- Actions taken/planned:
 - Piloting to strengthen the existing associations- PSC agreed
 - Discussion with Cooperative Association of Cambodia
 - In-country study tour is planned for producer associations
 - Formation of common market for apex association for sustainability



Other activities

- Project team held discussions with EU, AFD and FAO on the results of the value chain analysis, challenges and roadmap for development
- Mid-term evaluation (MTE) of the CEDEP II was held and the project team briefed the team on the activities and the progress up to date. The MTE reported the progress of the project as very satisfactory and made some recommendations
- Supervision mission of EIF and TFM was held to review the progress of the project. It expressed its appreciation on the progress
- Study tour to Bangladesh to study the aquaculture value chain development
- 3rd PSC meeting held in May
- A practical guide for fish and fishery products export has been drafted, validated, feedback from stakeholders obtained, presented before PSC and obtained general endorsement



Visibility

- Newsletters (English and Khmer)
- Brochures (English and Khmer)
- Fact sheet (English and Khmer)



Project implementation challenges

- Processors see no necessity for upgrading production facilities to meet food safety requirements due to lack of market pressure and inadequate legal framework governing food safety- multiple agencies and conflicting/overlapping responsibilities
- Cambodia Quality Seal scheme not yet adopted
- Preference for informal trade over formal trade by processors



Next step

- Implementation of HACCP in three pilot processing establishments and certifying
- Business match-making for the processors
- Develop process standards for 4 fishery products
- Supporting two pilot producer groups
- Creation of common market facilities for associations and creation of apex body



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THANK YOU