



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

**Progress of Activities
UNIDO**

February 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



Value chain assessment

- 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
 - Export to EU is banned as a consequence of non SPS compliance and of being listed as non-cooperating third country in fighting IUU
- Actions taken:
 - Road map for value chain development prepared and presented to TWG on fisheries
 - A practical guide for fish and fishery products export has been drafted
 - Work toward HACCP certifications at pilot companies is on-going⁴



Cambodian standards assessment

- 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
 - 4 process standards/codes of practices (fish sauce, dried shrimp, chilled crab meat, and frozen shrimp) are being jointly developed with ISC



Environmental impact assessment

- Key findings:
 - Use of illegal fishing gears
 - Overfishing
 - Domestic waste (solid and liquid) disposal to water body
 - Processing facilities has no significant impact simply because they are small scale and number
- Actions needed:
 - Awareness raising among fishermen, residents lived along the coast
 - Mitigation measures to be implemented in pilot processors
 - Advocate for government attention to the environmental impact



Apex association

- Key findings:
 - Existing associations formed during early projects 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 needed:
 - Strengthen existing associations (beyond project scope)
 - Formation of apex association



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
- For those wish to comply safety requirements, financial resource is a main constraint
- Preference for informal trade over formal trade by processors
- Limited sense of ownership by co-team



Financial report (Dec. 2015)

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



Next step

- Study tour to Bangladesh
- Finalize export manual
- Develop process standards for 4 fishery products
- Get pilot companies certified with HACCP
- Business match-making



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THANK YOU