



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

Progress of Activities

March 30, 2016



Program background/synergies

- The proposed CEDEP II project, following in the footsteps of CEDEP I, will support other potential products to expand, diversify, and enter export markets.
- Trade Development Support Program (TDSP) focused primarily on capacity building
- TDSP funded the first phase of the project “Better Quality and Safety of Fish and Fishery Products for Improving Fish Trade Development in Cambodia” implemented by the Department of Fisheries Post-Harvest Technologies and Quality Control (DFPTQ), Fisheries Administration of MAFF.
- The project’s objective was to enhance trade capacity through developing awareness on food safety; establishing associations of Fish processors; strengthening the capacity of Competent Authority.



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 strategy

- Baseline studies
 - Value chain assessment
 - Standards assessment
 - Market requirement survey
- Stakeholder consultations
- Work plan revised waiting for approval
- Revised work plan will not have any impact on the expected outputs and outcomes- no additional funds required
- Implementation activities continued



Planned activities Vs progress

Outcome/Outputs	Activities	Status
<p>Outcome 1: The <u>needs of the marine fisheries product export sector are better understood</u>, restructuring of the sector to better focus the <u>policy dialogue with the government is piloted</u> in three target provinces and the enabling business environment is improved</p>		
<p>Output 1: An <u>agenda of key issues</u> for the marine fishery product processors and export sector is identified</p>	<p>I.I.I Agenda of issues specific to sector identified and work plan developed to address those</p>	<p>Work plan submitted to PSC</p>
<p>Output 2: Basic studies of the <u>marine fisheries product value chain and target export markets</u> 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 assessment of the sector prepared</p>	<p>Done</p>
	<p>Road map for value chain development prepared</p>	<p>Done</p>
	<p>SPS requirements of importing countries</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 shared with Government and DPs via the Fisheries Technical Working Group</p>	<p>Disseminated through PSC/TWG</p>
	<p>I.II.IV Value Chain study is disseminated</p>	<p>Done</p>



Outcome/Outputs	Activities	Status
Outcome 1 continued		
Output 3: <u>The current ISC and FiA standards for marine fishery products are reviewed and updated if/as needed</u>	I.III.I ISC and FiA standards are reviewed. Update/develop standards in collaboration with ISC/MIH officials: <u>Training undertaken</u> , and <u>Codes of Practice</u> are being developed	<u>Standards assessment done</u> ; In progress
	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)	To be done after I.III.I above
Output 4: <u>An Apex Association is created and engaged in G-PSF discussions</u>	I.IV.I Series of consultations with existing producer associations held and constraints identified	In-progress
	I.IV.II Based on potential to establish Apex association, activities are identified and carried to help set up the association	In-progress



Outcome/Outputs	Activities	Status
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Outcome# 2: A group of marine fisheries processors have become export ready and are increasing their export business including to new markets

<p>Output 1: The <u>selected group of processors is supported</u> through technical assistance to help reach <u>SPS compliance</u> (e.g. HACCP, GMP, packaging, etc.) with requirements of target markets.</p>	<p>II.I.I SPS gap assessment of pilot processors carried out</p>	<p><u>Done</u></p>
	<p>II.I.II Workshops are organized to disseminate findings of SPS survey and develop implementation plan</p>	<p>In progress</p>
	<p>II.I.III Group training on SPS measures is organized for target groups of collectors/processors</p>	<p>Planned for 2nd Qtr-2016 after II.I.II above</p>
	<p>II.I.IV On-site training is organized at individual processor selected in target groups</p>	<p>Planned for 2nd Qrt-2016 after II.I.II above</p>



Outcome/Outputs	Activities	Status
Outcome# 2 continued		
<p>Output 2: Economically sustainable remedial solutions addressing negative <u>environmental impacts of fish processing</u> are implemented among firms in the selected group of processors, based on needs identified in through survey.</p>	<p>II.II.I Survey of <u>environmental issues</u> and mitigation needs carried out</p>	<p>Done</p>
	<p>II.II.II Workshops are organized to disseminate findings of environmental survey and <u>develop implementation plan</u></p>	<p>Completed</p>
	<p>II.II.III Group training on environmental mitigation organized for target groups of collectors/processors</p>	<p>Will be incorporated in activity under II.I.III</p>



Outcome/Outputs

Activities

Status

Outcome# 2 continued

Output 3: Market development 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.

II.III.I Develop possible event calendar for trade missions and trade fairs

Planned for mid-2016

II.III.II Overseas missions are organized and carried out

Planned for 2016

II.III.III Debriefing/dissemination workshops are organized to follow up on overseas missions

After II.III.II

II.III.IV Manual on trade facilitation issues for export of marine fisheries products prepared; Trade facilitation manual translated into Khmer

[Report presented](#) and ready

II.III.V Workshop(s) organized to disseminate information about trade facilitation among processors and traders

Partially done

II.III.VI Support is provided to help improve/introduce appropriate packaging for export markets

Consultation on-going



Outcome/Outputs	Activities	Status
Outcome# 2 continued		
Output 4: Lessons learned from Outputs under Outcome 2 are <u>disseminated</u> broadly to the larger community of producer associations in the three coastal areas	II.IV.I Dissemination workshops for local producer associations to disseminate lessons learned from outputs and activities under Outcome 2	Planned for 2016
	II.IV.II Fisheries TWG is informed about SPS, environmental needs, trade facilitation issues, market development, branding, and other issues of the sector identified through the project	On-going
	II.IV.III Meetings with local and national media (press, radio, TV) to explain results and lessons learned from outputs and activities under Outcome 2	On-going
<u>EXIT PLAN</u>	<u>Exit plans</u> will be strategized during 3 rd Quarter of 2016	3 rd Quarter of 2016



Reports generated

- Value Chain Analysis report
- Standards Assessment report
- Trade Facilitation Manual
- SPS and Legal Requirements of fishery products in importing countries
- Environmental Impact Assessment report
- SPS assessment reports
- Training materials on standards development



Communications and dissemination

Communication

- Newsletters
- Brochures
- Social media
- Print and electronic media

Dissemination

- PSC/SSC
- TWGF
- Workshops
- Consultations/discussions



Sustainability and Exit Strategy

- Creation of a sustainable export-oriented private sector in the Marine Fisheries is one of the emerging priorities
- Most of the activities are continuation of TDSP outputs
- Involvement of various institutes/agencies/Ministries:
 - MAFF/FiA- for capacity building of private sector
 - MOC- for creation of apex association
 - MIH/ISC- for development of code of practice
- Private sector upgradation through SPS and market linkage- for sustainability
- Federation- linking with common market facility- could be sustainable
- Involvement and participation of core team in implementation
- Exit plans will be developed by the III quarter of 2016



Core team and its involvement

- Periodic reports shared and progress reviewed with core team
- Involvement and participation of core team in activities/ workshops/steering committee meetings



Financial report (Feb 2015)

Total budget	\$1,303,942	
Request from EIF Tier 2	\$988,953	48% utilized
Government contribution	\$71,000	
Private Sector contribution	\$188,000	
In-Kind Contribution from MIEs	\$55,989	
Funds received	\$800,000	58% utilized
Funds utilized	\$470,445.99	



Status of implementation of recommendations of EIF supervision missions



ES/TFM recommendation dated 13th January 2014

#	ES and TFM recommended actions (13th January 2014)	Status as of Feb 2016	Description	Next step
1	It is recommended that UNDP and UNIDO synchronize their interventions on the basis of the identification of common elements to avoid duplication, to promote synergies, and the efficient use of resource.	On-going	Project team of the 2 MIEs discussed and shared their intervention plan. It was learned that nature of activities carried out earlier (i.e. value chain study, SPS assessment) by UNIDO was different from those done by UNDP. Hence could not be jointly implemented. However, the team shared methodologies, reports, contacts and ToRs of experts.	Further explore possibility of collaboration
2	It is recommended that a distinct “inter-component” consultation mechanism be established. This will achieve better coordination of activities between the components, improved transfer and sharing of acquired capacities from prior and ongoing technical assistance, and improved information sharing between the project components, the FP and the SSC.	On-going	DICO were updated about project progress through Implementation Committee (IC) Meeting and SSC-TD-TRI meeting. The followings were meetings attended during reporting period: <ul style="list-style-type: none"> ▪ 40th IC Meeting held in August 2015. ▪ 22nd SSC-TD-TRI meeting held in Aug 2015 ▪ 23rd SSC-TD-TRI meeting held in November 2015 ▪ 24th SSC-TD-TRI meeting held in Feb. 2016 	Attend any meeting as per request.



ES/TFM recommendation dated 13th January 2014

7	It is recommended the preparatory quarter of fisheries components should include a review of stakeholders' needs, available technical assistance/support instruments, and clear indication of intended beneficiaries for each activities and outputs. The year 1 activity plan and revised overall work-plan and budget should be submitted to the ES and TFM for comments and endorsement.	Completed	<ul style="list-style-type: none"> ▪ Stakeholders' needs have been identified in value chain study. ▪ Revised work plan together with justifications has been submitted for approval. 	Follow-up the approval status of revised work plan.
8	The criteria for the selection of processors and exporters from marine fishery sector should be detailed in the Year 1 Activity Plan and submitted to the ES and the TFM within six months of the start of the project.	Completed	To the best of our knowledge, there are only 7 processors/exporters having export potential. Among those, only one company is involved in formal export; while few are involved in in semi- or informal export; while the others are closed In addition, it is very critical to get the exporters onboard since compliance requirement is not enforced yet. For this reason, criteria for selection of processors/exporters is not relevant.	
11	A step by step exit plan should be elaborated and included in the <u>year 3 work-plan</u> of each component.	On-going	Exit plan will be completed by the next reporting period.	18



Joint ES/TFM recommended actions made after first Supervision Mission dated 4-8 May 2015

	Recommendation	Status as of Feb 2016	Description	Next step
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, trade facilitation and environmental impact assessment, project steering committee meeting.	Continue to engage core team in all activities.
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.	Completed	MET completed	NA
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.	



Reports

Progress reports

- 1st narrative report submitted (Start to Feb 2015)
- 2nd narrative report submitted (Jan to June 2015)
- 3rd narrative report submitted (July to Dec 2015)-
(without financial statement)

PSC Meetings

- 1st PSC meeting held in Sept 2014
- 2nd PSC meeting held in Sept 2015
- 3rd PSC meeting planned for May 2016



Challenges/Recommendations

- Processors see no necessity for upgrading production facilities to meet food safety requirement
- Weak legal framework governing food safety- multiple agencies and conflicting/overlapping responsibilities
- Cambodia Quality Seal is yet to be approved
- Human resources for enforcement is not adequate
- Preference for informal trade over formal trade by processors
- Narrow scope in ToR of core team limits involvement of core team in project implementation



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THANK YOU