



# POST-HARVEST FISHERIES AND POVERTY IN CAMBODIA

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## The Post-Harvest Fisheries Sector in the Global Context

The post-harvest fisheries sector is very much under-represented in the development policies and plans of most countries. The boundaries between the sector and other economic activities (such as trade, agriculture, transport and credit) are often unclear and this makes it difficult to fit activities in the sector into a clear sectoral framework. But the integration with areas such as women's affairs, food security, and poverty reduction, makes it especially important as a focus for development.

One of the main reasons that it is under-represented is that so little is actually known about the post-harvest sector, or that knowledge is rarely brought together in a systematic way and used in formal planning processes. However, the contribution that post-harvest fisheries plays in many economies is considerable as outlined below.

### **Employment**

It is estimated that globally there are about 35 million full-time and part-time people employed in primary production in fisheries (fishing and aquaculture). Approximately 85% of the small-scale fishers and fish farmers in the World live in Asia (FAO, 2002). Many are involved in some aspects of post-harvest activities, even if it is not their major focus of work. This figure has been

steadily growing at an annual rate of 2.2% since 1990 (FAO, 2002). It is also estimated that there are some 20 million people involved in small-scale processing, marketing and trading (McGoodwin, 2001).

### **Livelihood support**

If the fishers, the secondary workers and ancillary workers, and their families are taken into account some 200 million people are supported by small-scale fisheries worldwide, of which at least 100 million depend on the post-harvest fisheries sector (McGoodwin, 2001).

### **Poverty reduction**

Perhaps one of the most important contributions of the post-harvest sector is to poverty reduction. FAO (2002) estimates that there are some 5.8 million fishers earning less than one US\$/day globally and a further 17.3 million in upstream and downstream activities such as fish processing, trade and boat building.

### **Food Security**

Worldwide over a billion people depend on fish to supply at least 30% of their animal protein (FAO, 2002). About 56% of the world's population derives at least 20% of its animal protein from fish. In 2000 the global production of fish was in the order of 130 million tonnes of which about 73% was from capture fisher-

ies and 27% from aquaculture. Of this production, 74% was used for direct human consumption giving a global average annual food fish supply of 16kg per person (FAO, 2002).

### **Foreign Exchange**

For some countries, especially those endowed with stocks of shrimp and other high value resources, export earnings from fish and fisheries products now constitute a major part of foreign exchange earnings. Global fish trade in 2000 was reported to be US\$55.2 billion and is growing at an annual rate of 4% (FAO, 2002). This trade growth is particularly important for developing countries. Net export trade from these countries rose from US\$10 billion in 1990 to US\$18 billion in 2000.

### **Resource Sustainability**

Many of the world's fisheries resources are at or near the point where maximum sustainable yields can be harvested. The post-harvest fisheries sector contributes to the better use of fish resources by ensuring that the value of the highly perishable products are maintained in quality and price along the food chain.

The Cambodia Post-Harvest Fisheries Livelihoods Project (CPHFLLP) is a partnership between the Department of Fisheries (DoF) Cambodia and the UK Government's Department for International Development (DFID) -funded Post-Harvest Fisheries Research Programme. The main implementers of the project are the Community Fisheries Development Office (CFDO) of the DoF, IMM Ltd of the UK and NRI of the UK.

# The Post-Harvest Fisheries Sector in Cambodia

Cambodia is no exception to the wider global picture in the post-harvest fisheries sector. The sector is poorly understood and represented in policy but is one of the most visible and depended on sectors in the economy.

Fisheries in Cambodia contributes significantly to national economic development objectives related to food security, employment, poverty reduction, and foreign exchange earnings.

## Food Security

Fish is recognised as the most important source of animal protein in Cambodia and in some areas of the country aquatic resources make up 75% of the available animal protein. Overall fish consumption is many times greater than the global average reflecting the importance of the fisheries sector to the diet and culture of the country.

Processed fish, particularly in the form of fish paste and fish sauce, provides a daily source of fish for the national diet throughout the year and smooths out the seasonal fluctuations in landings. Access to fish is a major, if often under-represented, part of food security for the country and one that is becoming more recognised as population increases and global market demands stretch the available resources.



Processed fish product contribute to food security

## Employment

The fishing industry provides employment for many rural and urban people and it is estimated that at least 2 million people are directly involved in the fisheries sector. However, the actual figure is un-

“...even people predominantly dependent on rice production as a livelihood strategy...rely on rice field fishing as a safety net...”

known, in part, because 35% of the workforce are involved multiple income activities and secondary activities (which fisheries often is) are often not fully represented in official statistics. Many rice farmers and upland people in forest areas depend on fishing as a important subsistence activity. In addition the data on work in the fisheries sector generally, and in the post-harvest sector more specifically, are very difficult to collect accurately.

Those employed in the sector in-

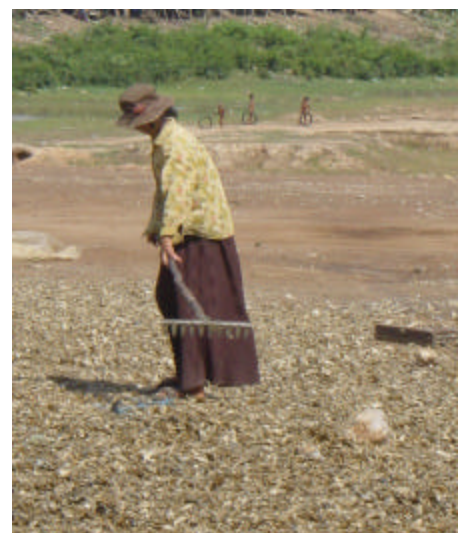


Fish processing provides employment for many people in Cambodia

clude people in processing and trading, labourers who pack, store, load, unload and transport fresh and processed fisheries products on foot or by trolley for short distances, people providing transport and storage services, ice plants, export processors,

fishmeal manufacturers and their staff, and those engaged in the production of packaging for different types of product such as fish sauce and fish paste. There are also those who supply production and processing inputs and services such as boat builders, mechanics, timber and fuel wood providers, and food vendors and many other supporting activities.

Although exact figures are lacking, it can be said with confidence that the fisheries sector is a major part of the lives of many rural people in Cambodia. Given that most Cambodians eat fish nearly every day of their lives in one form or another, and much of this is processed in the household, we can say that the number of people engaged in post-harvest activities is very high. The post-harvest sector is particularly important from a gender perspective. Men are involved in fish harvesting, undertaking the main fishing activities in the small-scale, middle-scale and large scale fisheries. Women are also involved in some small-scale fisheries, rice-field fisheries and are the key players in on-shore post-harvest activities, undertaking fish processing, storage and trade activities.



Women have a key role in post-harvest fishery sector

## The Post-Harvest Fisheries Sector in Cambodia (cont')

### Poverty reduction

Furthermore, the role of the sector in terms of poverty reduction is very important. Almost 80% of the poor in Cambodia are primarily engaged in the agriculture and fisheries sectors. Many poor and vulnerable people rely on the fisheries sector either directly or indirectly for their livelihoods and many rural and urban consumers of fish are poor.

Many women, who are heads of

household are particularly poor and there is a high incidence of these women being involved in post-harvest activities.

Post-harvest fisheries activities clearly provide a wide range of full-time and seasonal livelihood opportunities to many vulnerable people and the loss or decline of these opportunities would significantly increase the risks for many people already living on

### Foreign Exchange

The monetary value of the sector is estimated to be between US\$ 250-500 million, around about 16% of GDP. Official figures suggest that the fisheries sector produces over US\$40 million in foreign exchange. However, much of the fish that leaves the country goes unreported and the export value may be closer to twice this figure.



### FISHERIES CAMBODIA

- The fisheries sector provides a livelihood for over two million people.
- The sector has a high incidence of poverty.
- Fishing is of national importance for food security.
- The sector accounts for 16% of GDP.

## Planning for a Sustainable and Equitable future for Cambodia's Post-Harvest Fisheries

The post-harvest fisheries sector clearly provides a diversity of benefits for the economy and the people of Cambodia. It is the Government's aim that these benefits should be maximised on a sustainable basis. They should also be distributed fairly so that the poor, in particular, can continue to benefit from the fisheries resources. The development of the sector should also be in harmony with key policy documents such as the Poverty Reduction Strategy Paper.

Balancing the competing priorities of different stakeholder groups in current and future generations is a

major challenge for the country's policy makers. Successfully overcoming this challenge requires a good understanding of what is happening in the sector, who is involved, how the situation is changing and who stands to win and who to lose in such changes.

Recognising that such information was not available to make appropriate policy decisions, the Government of Cambodia decided to carry out some work to gain this information. This work gradually became the Cambodia Post-Harvest Fisheries Livelihoods Project (CPHFLLP).

### POST-HARVEST FISHERIES

*To maximise the contribution of the fisheries post-harvest sector to the achievement of national development objectives in terms of poverty reduction, food security, employment, foreign exchange balance and economic growth.*

## The Cambodia Post-Harvest Fisheries Livelihoods Project

Recognizing the importance of the post-harvest fisheries sector to the needs of the poor in the country, the Department of Fisheries asked assistance from the UK Government's Department for International Development (DFID) in understanding the sector more fully and helping to develop a sustainable future for those who depend upon it. In 2003 the Cambodia Post-Harvest Fisheries Livelihoods Project was started.

The Cambodia Post-Harvest Fisheries Livelihoods project aims to develop an understanding of how the post-harvest fisheries sector can be better managed for the benefit of the country as a whole, and for the poor in particular. It seeks to enable the formulation and implementation of policies and management strategies that improve the livelihoods of vulnerable people in the sector.

The work plan developed for the project consists of a number of inter-linked strands of activity. These are focussed on:

- Developing a post harvest fisheries overview for Cambodia which can guide policy and planning for the sector;
- Commissioning of a series of studies to improve the under-

standing of key issues;

- Building capacity to enable the government staff to work more effectively with stakeholders in the sector in the development and enhancement of sustainable post harvest fisheries livelihoods;
- Working with rural communities to understand, and respond to, the problems they face in the sector;
- The implementation of pilot impact projects to improve livelihoods of the poor in post-harvest fisheries.

The project is being implemented by the Community Fisheries Development Office of the Department of Fisheries and the current phase of the work will run until March 2005.

### *References cited:*

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**McGoodwin J. R.** (2001) Understanding the cultures of Fishing Communities: A key to fisheries management and food security.



Department of Fisheries,  
Cambodia



Working with community to understand their livelihood and better respond to their need

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