

WP4.4 Mini Research Project

Fish consumption patterns and value chain analysis in north-western Cambodia

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Abstract

This paper aims to understand the fish consumption patterns in northwestern Cambodia and to identify the key challenges in the fisheries value chain, and how to overcome these challenges for the sustainable development of Cambodia's fisheries sector. In Cambodia, fisheries resources are abundant, while value addition to fishery products is limited given that fish is a perishable food product which requires proper handling soon after harvesting. A survey was conducted with various stakeholders like fish wholesalers, retailers, consumers, government officials and processors in Battambang and Siem Reap provinces, in northwestern Cambodia. Nine key challenges within the postharvest fish supply value chain were identified as barriers posing threats to fishery products and limiting the market competitiveness of Cambodian fishery products. Technological issues -i.e. processing, packaging, preservation-, market access and raw fish supply deficiencies accounted for more than 60% of the challenges raised by respondents from the beginning of the supply chain (fishers) to consumers. Consequently, investment in infrastructure development, cost-effective technology and training, innovative solutions on processing techniques (drying, smoking and fermenting), and secure access to markets were recommended to improve the fish supply chain and increase the competitiveness of Cambodian fishery products in domestic and international markets. Further investigation on product diversification, branding and cost-effective innovative processing techniques should be carried out to create opportunities and value addition to Cambodian fishery products. A supportive policy instrument is also necessary for the sustainable growth of Cambodia's fisheries sector.

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