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National Report on Strengthening Sustainable Aquatic Food Value Chains for Enhanced Food Security and Nutrition in **Cambodia**



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Sustainable Aquatic Food Value Chains for
Enhanced Food Security and Nutrition in
Cambodia**



Bay of Bengal Programme Inter-Governmental Organisation

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Preferred citation

BOBP IGO, 2025. National Report on Strengthening Sustainable Aquatic Food Value Chains for Enhanced Food Security and Nutrition in **Cambodia**.

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Published by Dr. P. Krishnan, Director on behalf of the Bay of Bengal Programme Inter-Governmental Organisation, 91, St. Mary's Road, Abhiramapuram, Chennai 600 018, India.

National Report on Strengthening Sustainable Aquatic Food Value Chains for Enhanced Food Security and Nutrition in Cambodia

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1. Introduction and Context

1.1. Overview of the country's demographic and economic profile (fisheries)

Cambodia, officially the Kingdom of Cambodia, covers a total land area of 181,035 km² and shares borders with Thailand, Lao PDR, Viet Nam, and the Gulf of Thailand. Its coastline stretches around 440 km¹ with an Exclusive Economic Zone (EEZ) of about 55,600 km², encompassing rich ecosystems of mangroves, sea grass beds, coral reefs, and beaches along four coastal provinces-Koh Kong, Preah Sihanouk, Kep, and Kampot. The country hosts over 435 fish species and several endangered marine mammals such as dugongs and dolphins. As of January 2025, Cambodia's population was estimated at nearly 18 million, predominantly ethnic Khmer, with a youthful demographic over 60% under 30 years old and a sex ratio of 959 males per 1,000 females, slightly below the global average².

Economically, Cambodia experienced rapid growth over two decades before COVID-19, averaging 7.6% annual GDP growth from 1995 to 2019, driven by manufacturing exports, tourism, construction, and real estate. It achieved lower middle-income status in 2015 and aspires to reach upper middle-income by 2030 and high-income by 2050. The pandemic caused a 3.1% economic contraction in 2020, marking the first in 25 years, but the economy has since shown resilience, rebounding with growth rates of 3.0% in 2021, 5.2% in 2022, and an estimated 5.4% in 2023, signalling steady recovery and continued development momentum³.

The UN Sustainable Development Cooperation Framework (UNSDCF) is under progress, which is expected positively impacts the country's⁴ overall development. It identifies the main development priorities that aim to address social needs of the population and support economic transformation and formalisation towards LDC graduation. Cambodia's aquaculture systems include pond culture, cage culture, pen culture and rice-fish co-culture, all contributing significantly to food security and livelihood diversification⁵.

1.2. Key nutrition challenges (e.g., undernutrition, micronutrient deficiencies, and overweight/obesity).

Key nutrition challenges in Cambodia include persistent under nutrition (notably child stunting and wasting), micronutrient deficiencies (especially iron, vitamin A and zinc) driven by limited dietary diversity, and a growing burden of overweight and obesity, particularly among women and in urban populations-reflecting a double burden of malnutrition as the country undergoes dietary and lifestyle transitions.

Child stunting significantly improved from a prevalence rate of 32 percent in 2014 to 22 percent in 2021, child wasting, however, remained unchanged at around 10 percent (Royal Government of Cambodia & ICF, 2023, p. 217). 16 percent of the population cannot afford a nutritious diet⁶.

1.3. Summary of the importance of aquatic foods in national diets and livelihoods

Aquatic foods are of critical importance to Cambodia, serving as a cornerstone of the national diet and a primary source of livelihood for a significant portion of the population. Fish is the

second-most consumed food item after rice and provides the majority of the population's animal protein intake. In recognition of its essential role in healthy diets, Cambodia has included fish in its newly launched Third National Strategy for Food Security and Nutrition (2024–2028)⁷⁸.

2. Country Snapshot Table

Table 2.1: Country snapshot

Indicator	Year	Value	Source
Population (millions)	2024	17.9 million	9
GDP per capita (USD)	2024	5.8 (46.35 billion) (Fisheries sector contributes 8-10 % of GDP, involving about 50 % of the population).	10,11
Fish production -capture	2023	551950 (T)	12
Fish production -aquaculture	2023	1066808 tonnes (T)	9
Inland vs. marine share (%)	2023	1462968T inland 90%/155790T marine 10%	9
Top 3 capture species	2023	<i>Short mackerel 2490 T, Blood cockle 1833T, Spinefeet(=Rabbit fishes) 1803T</i>	9
Top 3 aquaculture species	2023	<i>Pangas catfishes NEI (92509T), Striped snakehead (68200T); Silver barb(51763T)</i>	9
Employment in fisheries & aquaculture (men/women)	2025	Families: 887416; Total fish workers 2030241 (1343305M+686936F)	13
Exports (value, USD)	2023	72644.56 (1000 USD)	14
Imports (value, USD)	2023	59788.24 (1000 USD)	12
Per capita fish consumption (kg/year)	2022	63kg/year ; In recognition of its essential role in healthy diets, Cambodia has included fish in its newly launched Third National Strategy for Food Security and Nutrition (2024-2028) .	15
% of animal protein from fish	2022	68.6% of animal protein is from fish(Fish provides 60% of the animal source protein); 76% of animal protein from fish (FAO 2019)	16
Estimated fish loss & waste (%)	2021	~ 25-35%	17
Women's participation in post-harvest (%)		Estimated that women own 61.2% of the 505,134 Micro-Small-Medium Enterprises (MSME) in Cambodia. But total fisher women data not obtained.	18

Indicator	Year	Value	Source
Key compliance measures (traceability, HACCP, CDS, PSMA)		Cambodia has EU backed CAPFISH-Capture project, rolled out CamTrace (digital traceability tool adopted by multiple enterprises), also has trained officials/industry on SEAFDEC’s eACDS catch documentation system; HACCP is mandatory for exporting FBOs with at least 4 Enterprises certified under CAPFISH support; Cambodia became a party to PSMA on 6Dec 2019 is strengthening port controls/inspections to block IUU-linked landings.	19
Major climate/environment risks		Highly vulnerable to climate change effects of fisheries, provide livelihoods to millions and 80% of animal protein in the diet. Hydrological variation in the Mekong Basin induced by climate change may amplify an emerging boom-and bust cycle of fish catches, with banner years followed by years of shortage.	20

3. Aquatic Food Production and Utilization

3.1. Trends in capture fisheries (inland and marine) and aquaculture

The capture fisheries trends in Cambodia from 2014 to 2025 show a clear contrast between the trajectories of marine and inland production. Inland capture dominates the sector throughout the period, consistently contributing several times more than marine capture. From 2014 to 2018, inland production remains high and relatively stable, increasing from around 500,000 tonnes to over 530,000 tonnes. However, a marked decline begins in 2019, with inland catch falling sharply to about 480,000 tonnes and further to approximately 410,000 tonnes in 2020. The downward trend continues into 2021, reflecting broader pressures such as hydrological changes, habitat degradation, and intensifying competition for freshwater resources. A moderate recovery appears from 2022 onwards, though inland catch remains below the earlier peak years. Aquaculture production increased sharply from 143,000 tonnes in 2015 to 320,280 tonnes in 2024, indicating rapid expansion driven by growing market demand and increased private-sector investment²¹.

Marine capture, in contrast, shows a slower but steady upward movement across the period. Beginning at around 120,000 tonnes in 2014, the marine catch gradually increases each year, reaching nearly 130,000 tonnes by 2023. Unlike inland fisheries, marine capture does not experience major fluctuations, indicating comparatively stable stock conditions or more consistent fishing effort and management.

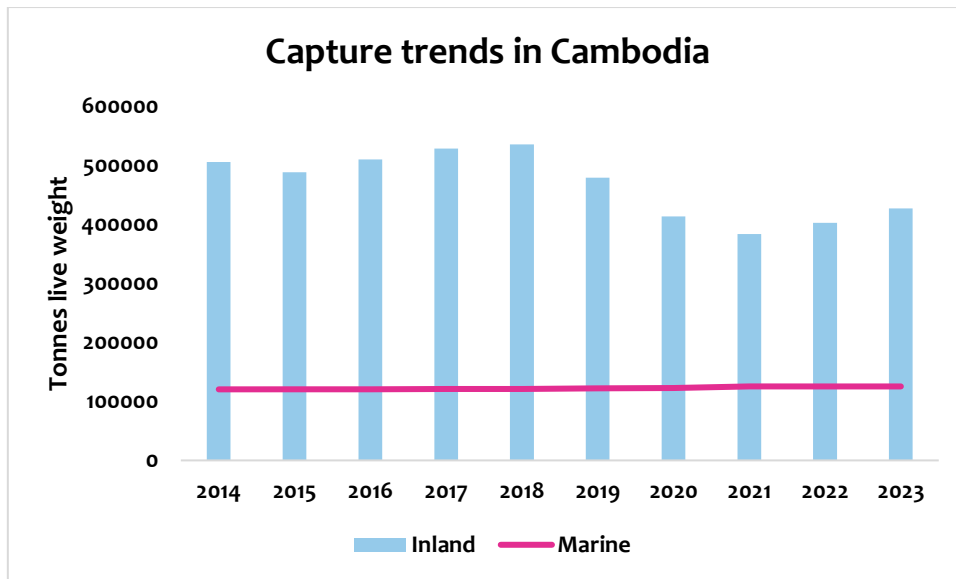


Figure 3.1: Capture trends in Cambodia

Data sourced from FishstatJ

Inland fisheries historically the backbone of Cambodia’s capture production are showing signs of pressure and decline, while marine fisheries exhibit incremental but steady growth. These trends underscore the need for targeted management responses, especially for inland ecosystems, to maintain productivity and support dependent communities.

3.2. Main species and product forms

A list of major species and product forms and their catch in 2023 is given in the figure3.2. A broader range of commercially important species, including Asian seabass, groupers, cobia, pompano and mud crab in marine farming systems²².

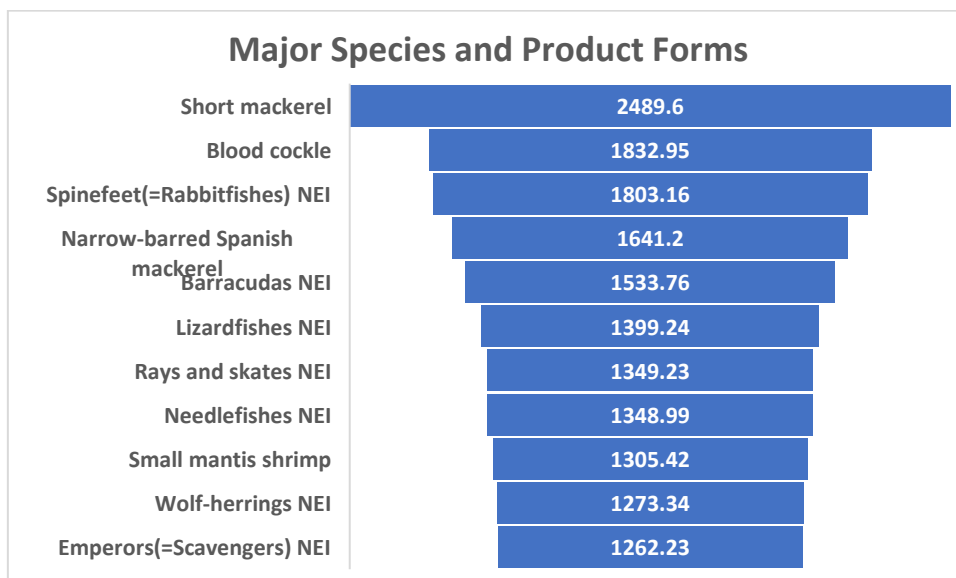


Figure 3.2: Major species and product forms

Data from FishStatJ

3.3. Major production zones and seasonal characteristics

Cambodia's Inland fisheries form part of the Mekong River system, which is one of the largest inland fisheries in the world²³. The key production zones and seasonal patterns are given in the table.

Table 3.1: Production Zones, Cambodia

Production Zone	Key Provinces /Areas	Seasonal pattern – key notes	Reference
Tonlé Sap Lake & floodplain	Siem Reap, Battambang, Kampong Thom	Wet season: flood expansion, spawning/drift; Dry season: receding, migration/harvest	24,25
Mekong River & floodplain (riverine)	Kratie, Stung Treng, Kampong Cham	Wet season: upstream spawning; Dry season: refuge pools, concentrated fish	26
Coastal Marine & lower floodplain	Kampot, Sihanoukville, Koh Kong, Bassac	Monsoon-driven marine seasonality; estuarine linked to floods/tides	27
Aquaculture (floodplain & coastal)	Floodplain zones, some coastal ponds	Dry season/recurring flood-paddy cycle; rice-field fisheries link	28

3.4. Processing, preservation and domestic consumption practices

For generations, food security and nutrition in Cambodia have depended on its rich inland fisheries, with communities harvesting fish and other aquatic animals throughout the year. Cambodia has an old tradition of processing freshwater fish such as fish paste, fermented fish, dry salted fish, smoked fish, fish sauce, and dried fish for animal feed. The two freshwater fish species, namely: *Cirrhinus siamensis* and *C. lobatus*, are important for processing for the domestic market. For marine fishes, the main commercial species are mackerels, scads, anchovies, snappers, shrimps, blue swimming crab, cuttlefish, squid, green mussels, oysters and blood cockles²⁹.

The supply chain system is presented in the following figure.

Supply Chain

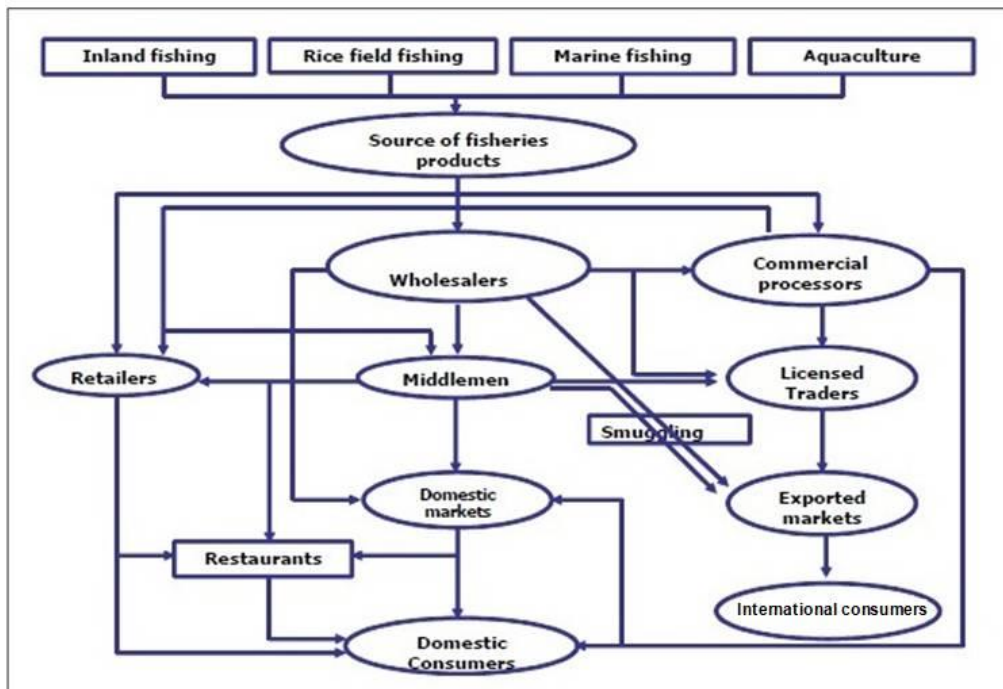


Figure 3.3: Supply Chain System, Cambodia

This abundance led to traditional preservation methods such as fermenting fish, crab, and shrimp, which later evolved into iconic Cambodian foods like prahok and kapi that remain staples today. Cambodia fishery profile by SEAFDEC demonstrate that in 2023, processed fish and fishery production was led by fish sauce at 75.8 million L, as shown in the chart below. This was followed by fermented fish paste at 25,690 t, both key staples in Khmer cooking. Fillet-dried fish (6,537 t) and stained fish (6,485 t) also contributed significantly as common protein sources in everyday diets³⁰.

Marine products: In marine sector, that fish sauce is the dominant product by volume, while steamed mackerel, crab meat, and shrimp paste form the next significant categories, with other dried and fermented products produced in much smaller quantities.

Inland products: In inland, fish sauce overwhelmingly leading production, followed by sun-dried fish, dried fillets, and smoked fish, with all other inland processed items contributing relatively lower quantities.

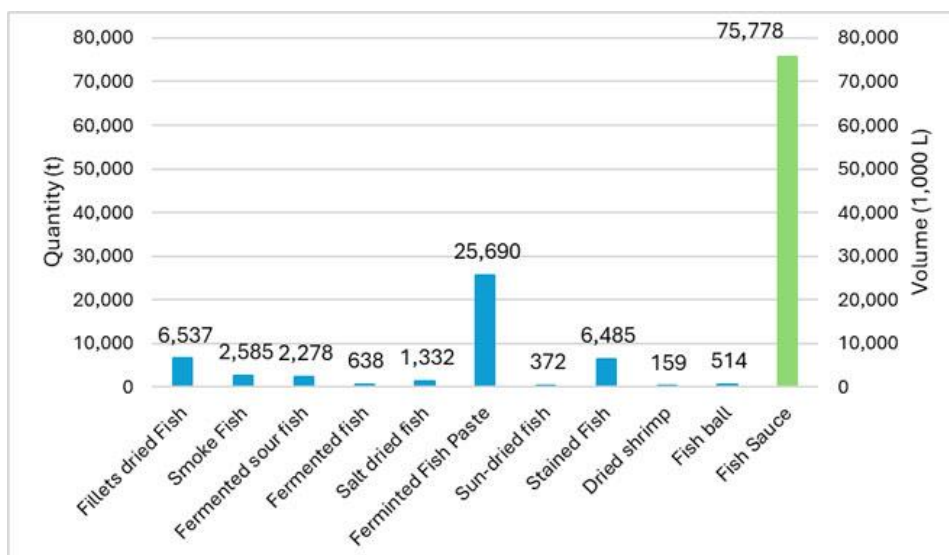


Figure 3.4: Inland fishery processing products in Cambodia 2023

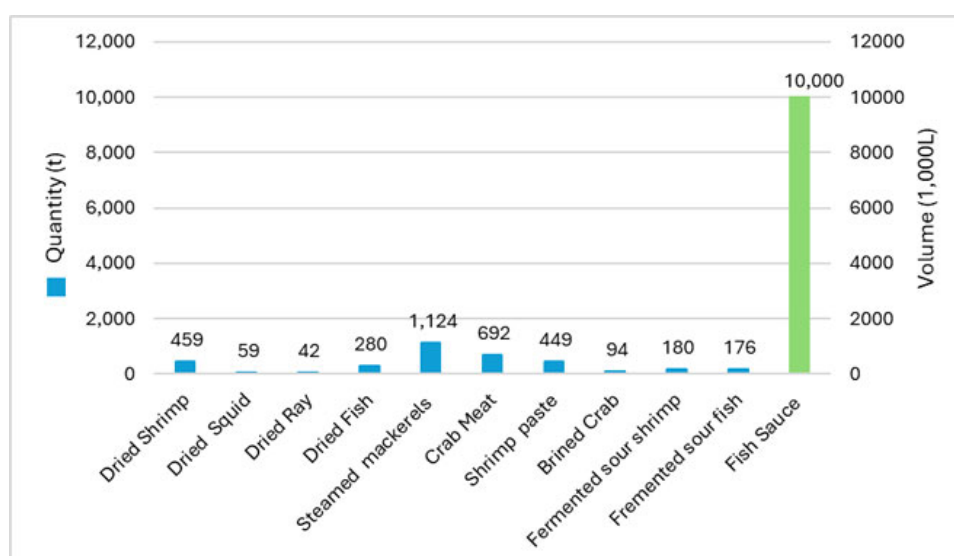


Figure 3.5: Marine fishery processing product in Cambodia 2023

Source: SEAFDEC Country Profile, Cambodia

4. Trade and Market Dynamics

4.1. Overview of fish exports (species, value, markets)

Cambodia's fish export volumes have shown moderate fluctuations over the past decade, ranging from about 31,684 tonnes in 2014 to a peak of 41,969 tonnes in 2018. After 2018, export volumes declined to around 33,000 tonnes between 2019 and 2021, before gradually increasing again. By 2023, exports rose to 35,243.8 tonnes, indicating a partial recovery compared to earlier years. Overall, the trend reflects a pattern of growth up to 2018, followed by a period of contraction and then stabilization with slight improvement toward 2023. In 2024, Cambodia exported 3,833 tonnes of fishery products, mainly comprising wild-caught products, dried fish and fish paste destined for regional markets such as China, Australia, New Zealand and ASEAN³¹.

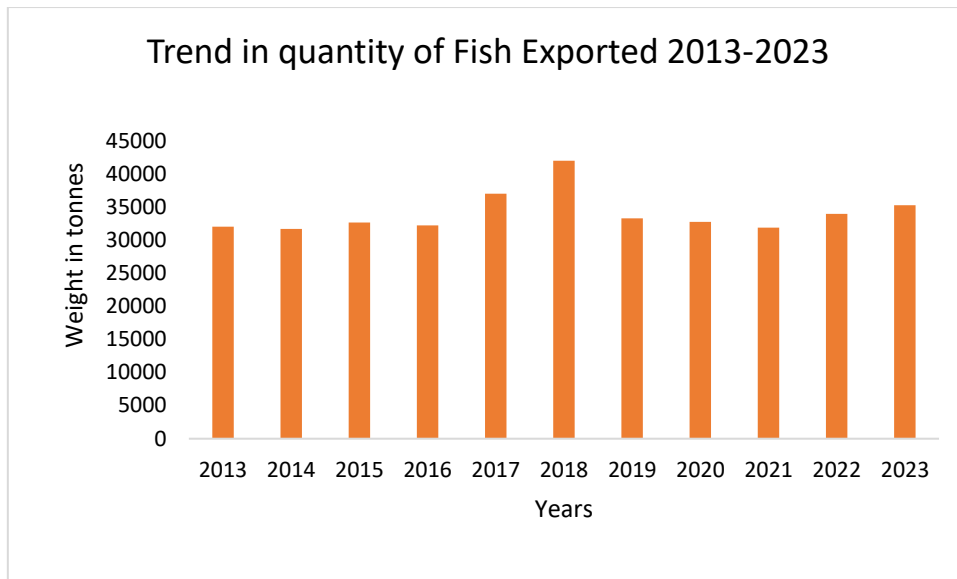


Figure 4.1: Fish export trend, Cambodia

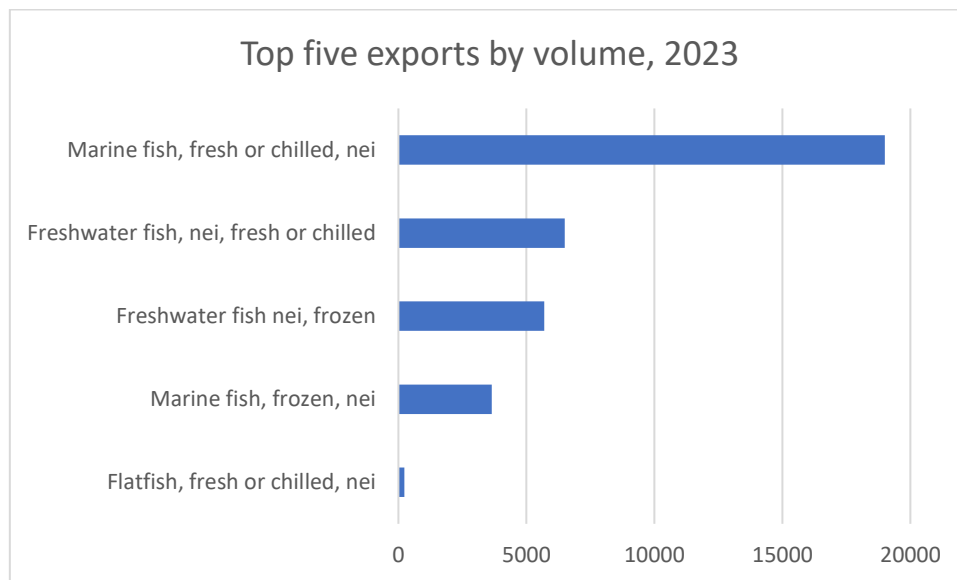


Figure 4.2: Top five export commodities

Cambodia’s fish exports are primarily oriented toward regional Asian markets, with Thailand serving as the dominant destination at USD 380.48 thousand, reflecting strong cross-border trade and Thailand’s role as a regional processing and re-export hub. China is the second-largest market at USD 119.77 thousand, driven by demand for processed freshwater fish products. Exports to the Republic of Korea (USD 79.43 thousand) and Japan (USD 29.79 thousand) indicate growing penetration into higher-value markets, particularly for processed and quality-certified fish products. Vietnam, traditionally a close trading partner, accounts for USD 25 thousand, largely involving cross-border trade and supply chain integration. Overall, Cambodia’s export profile is regionally concentrated, with emerging but modest access to Northeast Asian premium markets.

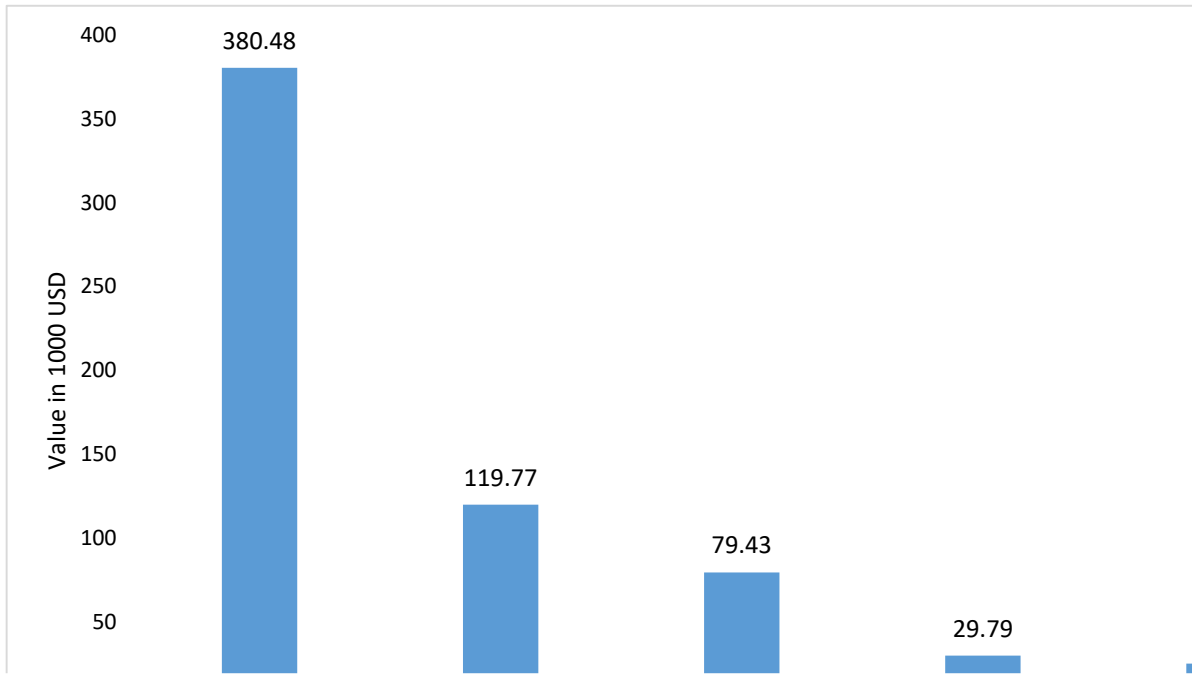


Figure 4.3: Top export destinations, 2023

4.2. Key import flows and their drivers

Significant volume of low-priced marine and fresh water fish mainly from Thailand and Vietnam for meeting domestic demand while fishing season is closed and when the Mekong-Tonle Sap Inland catch declines. Imported products include, small pelagic (mackerel, sardines) frozen marine fish, dried fish, processed fish products, and fish meal, and brood stock³². The import flow is mostly driven by a. national fish-supply and demand gap, b. fluctuation in inland production, c. Growth of aquaculture feeding requirements, d. Increasing urban consumption of low cost frozen imports, e. price competitiveness of neighbouring countries, f. porous land borders that facilitate formal and informal trade links with Thailand and Vietnam. The needs for affordable fish protein, industrial feed requirements, and regional trade integration in Lower Mekong region³³.

The following figure shows the aquatic food balance for the last five years.

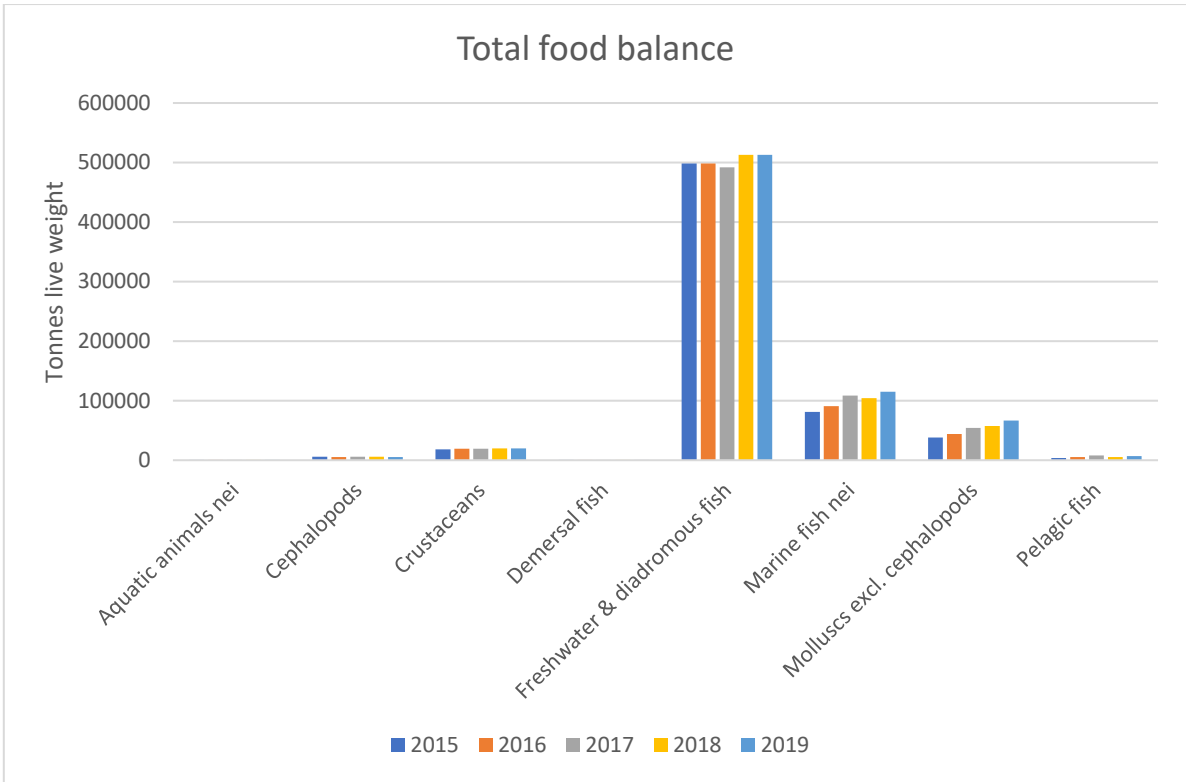
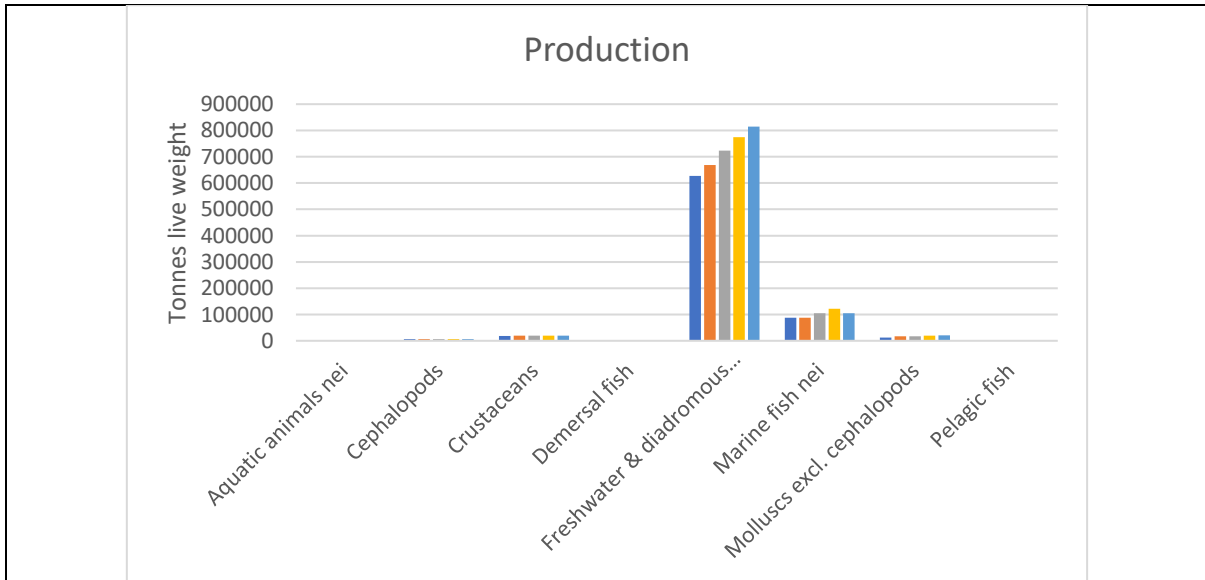


Figure 4.4: Aquatic total food balance

The following three figures present the total production, import and export for the last five years (all data from FishStatJ).



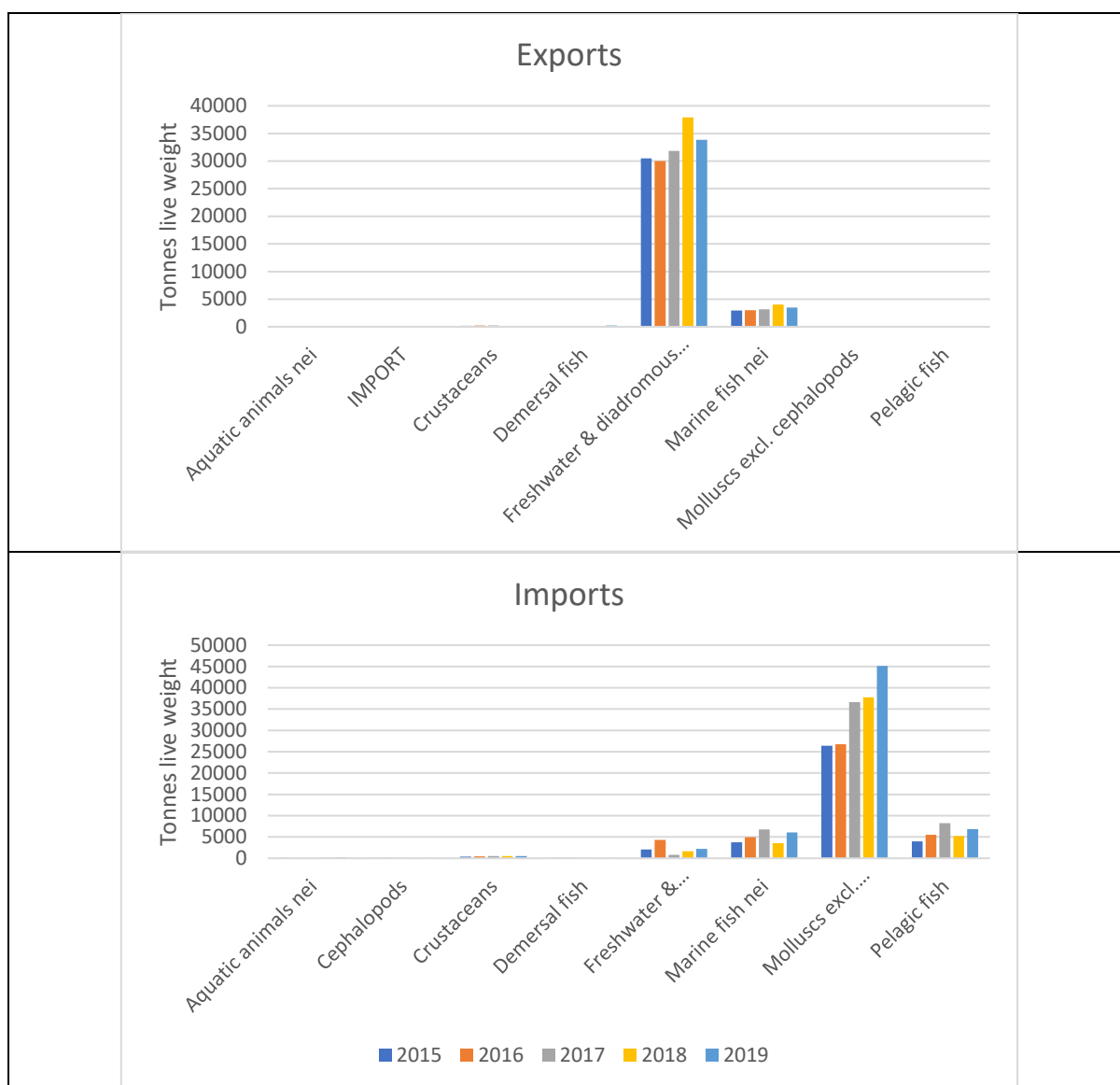


Figure 4.5: Production, imports and exports

4.3. The role of domestic markets in providing affordable fish to households

Domestic fish markets in Cambodia play a critical role in supplying low-cost, nutrient-rich fish to households, particularly the rural poor who depend on fish as their primary protein source. Large volumes of small freshwater species from the Tonlé Sap and Mekong systems enter local markets at prices far lower than livestock or imported products, making fish the most affordable and accessible animal protein for most Cambodians. Fresh fish is complemented by widely available processed products-prahok, dried fish, and smoked fish-which ensure year-round access, especially during seasons when capture fisheries decline. These domestic market networks are therefore essential for household food security, nutrition, and dietary diversity, while also supporting thousands of traders, processors, and market-based livelihoods³⁴.

4.4. Barriers and opportunities (tariffs, non-tariff measures, certification, and traceability).

Cambodia's fisheries face several trade-related barriers but also emerging opportunities. Tariff barriers remain significant in non-ASEAN markets, where higher duties reduce competitiveness for Cambodia's largely low-value freshwater species; however, opportunities exist through ASEAN tariff reductions (ATIGA) and potential duty-free access under the EU's Everything But Arms (EBA) scheme if quality standards are met. Non-tariff measures (NTMs)-including stringent sanitary and phytosanitary (SPS) requirements, inadequate accredited laboratories, and heavy documentation-limit exports, though ongoing UNIDO-supported food safety and SPS upgrades offer clear pathways for improvement. Certification barriers persist because few processors comply with HACCP, GMP, or international aquaculture standards, but this also creates opportunities to develop national aquaculture certification systems and promote HACCP-compliant processing for premium markets. Weak traceability-rooted in small-scale, multispecies inland fisheries and limited digital reporting-constrains access to high-value markets, yet it presents opportunities for digital traceability pilots, QR-code systems for aquaculture, and closer alignment with ASEAN traceability frameworks³⁵.

Cambodia adopted the Law on Standards of Cambodia in 2007 to improve the quality of products, services, and management. The government created an Institute of Standards of Cambodia (ISC) in 2008 as a national standard institution who draft laws and regulations, conducts production surveillance, provides supervision and technical support, provides training and consultancy to help companies register and certify their products, disseminates technical regulations, and develops national standards for products and management³⁶. A weak commercial arbitration infrastructure paired with slow governmental response to judicial requests for clarification could present barriers to U.S. companies if a dispute arises³⁷. The limited processing technology, weak market infrastructure and regulatory constraints as key barriers that hinder trade competitiveness³⁸.

5. Nutritional Contribution of Fish

5.1. Fish's share in total protein intake

Fish is the dominant source of animal protein in Cambodia, contributing about 75-76% of the total animal-protein intake for the population. High dependence on inland capture fisheries from the Tonlé Sap and Mekong systems, along with widespread availability of freshwater species in domestic markets, makes fish the most accessible and affordable protein for both rural and urban households. Studies by WorldFish and IFRDI, as well as national nutrition assessments, consistently show that Cambodians consume more than 50-60 kg of fish per person per year-one of the highest rates globally-resulting in fish far outweighing meat, poultry, and eggs in meeting daily dietary protein needs.

5.2. Key micronutrients supplied (Ca, Fe, Zn, I, Se, Vitamin A, Vitamin B12, DHA/EPA)

Fish in Cambodia is not only the main source of animal protein but also a critical provider of essential micronutrients that are difficult to obtain from plant-based foods. Small freshwater fish commonly consumed in Cambodia-such as *trey riel*, *trey changwa plieng*, and other Tonlé

Sap species are eaten whole (including bones, head, skin, and viscera), making them exceptionally rich in calcium (Ca) and providing highly bioavailable iron (Fe) and zinc (Zn), which are vital for preventing anaemia and supporting immune function. Inland fish also contribute important amounts of iodine (I) and selenium (Se), key for thyroid function and antioxidant defense. Fatty species and fish oils supply vitamin A, supporting vision and immunity, and are among the best natural sources of vitamin B12, a nutrient often lacking in low-meat diets. In addition, both wild and farmed fish provide the long-chain omega-3 fatty acids DHA and EPA, crucial for child brain development, maternal health, and cardiovascular protection. Given Cambodia's high per-capita fish consumption, these species collectively play an irreplaceable role in meeting national micronutrient needs and preventing deficiencies across vulnerable populations³⁹.

5.3. Role of small fish species consumed whole

Small indigenous freshwater fish species consumed whole in Cambodia play an exceptionally important nutritional role, supported by recent data. Cambodia's per-capita fish consumption is among the highest in the world at around 63 kg/person/year, and fish provide 37% of total dietary protein and 76% of animal-source protein nationally. Small fish such as *trey riel* and *trey changwa plieng*, typically eaten whole (including bones, viscera, and head), contribute disproportionately to micronutrient intake: studies show they supply up to 86% of calcium intake from aquatic foods, as well as substantial amounts of bioavailable iron, zinc, vitamin A, vitamin B12, and omega-3 fatty acids. Consumption of traditional dishes made with small whole fish can meet up to 45% of daily iron requirements for women and children. Given that micronutrient deficiencies persist—only 32% of Cambodian children (6–23 months) meet minimum dietary diversity criteria—these nutrient-dense small fish remain indispensable to the diets of rural and low-income households, and are a vital buffer against anaemia, stunting, and poor maternal nutrition⁴⁰.

5.4. Evidence from national nutrition surveys or literature

Surveys for nutrition and consumption studies show fish is central to Cambodian diet, providing 37% of total protein intake and over 75% of animal source protein⁴¹. It is estimated that per capita fish consumption estimated is 63Kg/person/year which is highest globally reflecting long-standing reliance on freshwater resources such as the Tonlé Sap⁴². Dietary assessments indicate that small indigenous fish species (SIS), which are affordable and widely available, make up a large proportion of household aquatic food consumption. Because these species are often eaten whole, they supply substantial amounts of micronutrients that are otherwise scarce in rice-based diets, including calcium, iron, zinc, vitamin A, vitamin B12, iodine, and omega-3 fatty acids. These nutrients are especially critical in a context where only 32% of children aged 6–23 months meet minimum dietary diversity requirements, and micronutrient deficiencies (anaemia, stunting) remain widespread⁴³.

Peer-reviewed literature further reinforces the nutritional value of Cambodia's inland fisheries. Studies by Roos and colleagues demonstrate that common freshwater species can provide up to 45% of daily iron needs for women and children when consumed in traditional dishes, while small whole fish contribute up to 86% of calcium intake derived from aquatic foods. Research also highlights the role of fish-based products and small fish powders in

improving child malnutrition outcomes, particularly in rural communities with limited access to alternative animal-source foods. Recent analyses show that small fish retain much of their nutritional quality even when dried-important for seasonal food security. Together, national surveys and scientific studies confirm that Cambodia's inland and small-scale fisheries are not only essential for food security but are also irreplaceable for meeting micronutrient needs, especially among vulnerable populations⁴⁴.

6. Fish Loss and Waste (FLW)

6.1. The main points along the chain where losses occur (landing, transport, processing, retail)

Losses in Cambodia's fisheries value chain occur at several critical points, beginning at landing sites where inadequate icing, delayed handling, and exposure to high temperatures lead to rapid spoilage. During transport, poor insulation, long travel times from Tonlé Sap and riverine landing points, and limited access to cold storage further increase physical and quality losses. In processing-especially drying, fermenting, and smoking-losses arise from insect infestation, uneven drying, contamination, and suboptimal hygiene, reducing both quantity and nutritional quality. At retail, inadequate chilled display, repeated thawing and refreezing, and long open-air exposure cause additional deterioration, contributing to both economic losses and reduced consumer safety⁴⁵.

6.2. Available estimates of quantity and value lost

Research suggests that post-harvest and supply-chain losses in aquatic foods are substantial in Cambodia: one source estimates that up to 25% of fish/aquatic foods are lost or spoiled before reaching consumers due to poor handling, transport, storage, and processing. This loss not only reduces food availability and nutritional benefits, but also represents a significant economic loss for producers, processors, and retailers⁴⁶.

During post-harvest, Fishermen, fish traders, fish processors and fish distribution centers do not follow proper use of cold chain, storage or handling transportation practices for fresh and processed fish products, leading to increased post-harvest losses⁴⁷.

6.3. Causes (infrastructure, handling, storage)

In Cambodia's freshwater and small-scale fisheries, post-harvest losses are largely driven by poor infrastructure, weak handling practices, and inadequate storage systems. Landing sites on the Tonlé Sap and Mekong-Bassac basin often lack clean platforms, shade, and access to ice, causing fish to deteriorate quickly in high temperatures. Handling practices such as delayed sorting, the use of non-insulated baskets, and rough loading/unloading further damage fish and accelerate spoilage. Storage remains a major bottleneck, as many fishers and traders have limited access to ice, insulated containers, cold rooms, or hygienic drying areas, leading to microbial contamination, insect infestation, and quality loss during drying, fermenting, and transport. Together, these systemic gaps significantly reduce the quantity, quality, and market value of fish along Cambodia's inland fish value chain⁴⁸.

6.4. Mitigation practices or innovations

Several mitigation practices and innovations are being introduced in Cambodia to reduce post-harvest losses and improve fish quality, particularly in inland and small-scale fisheries. Improved handling and preservation such as wider use of ice, insulated containers, and hygienic processing areas are promoted under initiatives like the CAPFISH Post-Harvest Fisheries Development Programme to address spoilage at landing sites and during transport. Small-scale processors are being supported to adopt better drying, fermenting, and packaging technologies to reduce contamination and improve product shelf-life. Investments in cold-chain infrastructure, enhanced storage facilities, and safer processing technologies aim to reduce microbial and insect-related losses. In parallel, sustainable aquaculture expansion and community-based fisheries management help stabilize supply and reduce pressure on wild stocks, indirectly lowering post-harvest stress and quality loss. Together, these innovations strengthen the resilience, efficiency, and nutritional value of Cambodia's fish value chain⁴⁹.

7. Socio-economic and Gender Dimensions

7.1. Employment generated by the sector (fisheries, aquaculture, post-harvest)

Cambodia's fisheries sector is one of the country's largest sources of rural employment, engaging an estimated 887,416 fishing and aquaculture families and generating work for more than 2,030,241 people across capture fisheries, aquaculture, and post-harvest activities. Capture and inland fisheries employ the majority, while aquaculture provides fast-growing opportunities in pond culture, cage farming, seed production, and feed supply. Post-harvest activities including drying, fermenting, salting, smoking, trading, and small-scale processing employ tens of thousands more workers, many of whom are women involved in micro- and household-level enterprises. Together, these subsectors form a major employment backbone for Cambodia's rural economy and livelihoods⁵⁰.

Women play a central role in Cambodia's post-harvest fisheries sector, where they are heavily involved in fish processing, drying, fermenting, salting, smoking, packaging, and local marketing. Although comprehensive national sex-disaggregated data are limited, evidence shows that women own about 61.2% of Cambodia's 505,134 micro-, small- and medium-sized enterprises (MSMEs), many of which operate in food processing, including fish-based products. In rural fishing communities, women often manage household-level processing and trading, contributing significantly to value addition and income despite being under-represented in formal fisheries statistics. Their participation is crucial for maintaining product quality, ensuring food safety, and supporting household livelihoods across Cambodia's inland fisheries economy⁵¹.

7.2. The role of women in processing, trading, and marketing

Women play a foundational role in Cambodia's post-harvest fisheries sector, where they are heavily engaged in processing, trading, and marketing of fish and fish products. Women commonly lead activities such as cleaning, sorting, salting, fermenting, drying, smoking, and packaging-processes that add significant value to inland fish catches from the Tonlé Sap and Mekong systems. They also dominate small-scale fish trade in rural markets, often serving as primary buyers, vendors, and transporters of processed products. Evidence from the CAPFISH

Gender Analysis shows that women make up a large share of Cambodia’s micro- and small-scale processors, and many operate home-based enterprises that supply local and regional markets. Despite their central economic and nutritional contribution, women’s work remains undervalued and under-recorded in formal statistics, even though their involvement is essential for ensuring product quality, household income, and market flow across the fish value chain⁵².

7.3. Constraints faced by small-scale actors (e.g. access to finance, technology)

Small-scale fisheries actors in Cambodia face multiple constraints that limit their productivity and ability to benefit from aquatic resources. Access to formal finance remains a major barrier, with many fishers and processors relying on informal lenders due to lack of collateral or documentation, restricting investment in better equipment and improved post-harvest practices. Limited access to appropriate technologies—such as ice, insulated containers, hygienic drying racks, and modern processing tools—leads to quality deterioration and higher spoilage. Weak cold-chain and storage infrastructure at landing sites and rural markets further restrict the value that small-scale actors can capture. Women, who play a central role in processing and trading, often face additional constraints including time burdens, limited mobility, and reduced access to training and market information. These systemic challenges undermine livelihoods, reduce income stability, and constrain the contribution of Cambodia’s small-scale fisheries to food security and rural development⁵³.

8. Sustainability and Resilience

8.1. Summary of stock status where available (overfishing, recovery, habitat pressures)

Both inland and marine fisheries in Cambodia show clear signs of overexploitation. Inland fisheries in the Tonlé Sap and Mekong–Bassac systems report declining CPUE, reduced fish size, and shorter fishing seasons. Marine coastal stocks are similarly stressed due to overcapacity, destructive gear, and high pressure on near shore resources. The inland fisheries from the Tonlé Sap and Mekong systems are declining due to hydrological changes and environmental pressures, calling for stronger governance and habitat protection⁵⁴.

Overfishing Trends: Both inland and marine fisheries in Cambodia show clear signs of overexploitation. Inland fisheries in the Tonlé Sap and Mekong–Bassac systems report declining CPUE, reduced fish size, and shorter fishing seasons. Marine coastal stocks are similarly stressed due to overcapacity, destructive gear, and high pressure on near shore resources⁵⁵.

Habitat and Environmental Pressures: Habitat degradation is a major driver of stock decline. Inland ecosystems face hydropower impacts, altered flood pulses, sand mining, wetland loss, and pollution—disrupting migration and spawning. Marine areas face mangrove degradation, sedimentation, and coastal habitat loss. Climate-driven hydrological changes in the Mekong further threaten long-term stock stability⁵⁶.

Signs of Local Recovery: Localized recovery is reported in inland Community Fisheries (CFi) areas where enforcement, habitat protection, and co-management have improved. Some marine protected areas and strengthened port controls under PSMA implementation also show early potential for stabilizing coastal stocks⁵⁷.

8.2. Environmental risks (pollution, waste, carbon intensity)

Cambodia's fisheries face growing environmental risks linked to pollution, unmanaged waste, and increasing carbon intensity across the value chain. Pollution from agricultural runoff, plastics, industrial discharge, and household waste is degrading water quality in the Tonlé Sap and Mekong–Bassac systems, reducing fish habitat productivity and contributing to fish mortality and contamination risks. Waste from fish processing—particularly wastewater, organic residues, and by-products—often lacks proper treatment, leading to localized pollution hotspots around landing sites and village-level processing clusters. Marine and inland environments are increasingly affected by plastic leakage from gear, packaging, and riverside settlements. In addition, reliance on fuel-intensive vessels, ice production, and inefficient transport contributes to a rising carbon footprint in both capture and post-harvest operations, especially in coastal trawl and long-distance transport segments. These environmental pressures collectively threaten ecosystem health, fish stocks, and the long-term sustainability of Cambodia's small-scale fisheries.

Pollution: Cambodia's inland and coastal fisheries are increasingly affected by pollution from agricultural runoff, industrial effluents, plastics, and untreated domestic wastewater. Water quality decline in the Tonlé Sap and Mekong–Bassac systems has reduced habitat productivity, increased fish mortality risk, and contributed to contamination that affects food safety and livelihoods⁵⁸.

Waste Management Challenges: Fish processing villages and landing sites often lack adequate facilities for managing wastewater, organic residues, and discarded by-products, creating localized pollution hotspots. Unmanaged waste from drying, fermenting, and salting operations can degrade surrounding wetlands, while plastic leakage from gear and packaging contributes to broader aquatic pollution⁵⁹.

Carbon intensity of the sector: Cambodia's fisheries value chain—including fishing vessels, ice production, long-distance transport, and energy-intensive processing—contributes to rising carbon emissions. Fuel-dependent coastal fleets and limited energy-efficient technologies increase carbon intensity, while climate-related hydrological shifts amplify vulnerability of inland fisheries⁶⁰.

8.3. Climate risks and adaptation measures

Climate risks to fisheries and aquatic food systems arise from rising temperatures, changing rainfall patterns, extreme weather events, sea-level rise, and habitat degradation, all of which disrupt fish migration, breeding, and productivity. Inland systems face altered river flows, droughts, and reduced water quality, while coastal fisheries are threatened by storm surges, coastal erosion, saline intrusion, and degradation of mangroves and coral habitats. To address these risks, adaptation measures include strengthening community-based resource management, restoring critical habitats such as wetlands and mangroves, improving early warning systems, and adopting climate-resilient aquaculture practices. Additional strategies involve diversifying livelihoods, upgrading post-harvest infrastructure to cope with climate variability, promoting sustainable fishing gear and practices, and mainstreaming climate considerations into fisheries policies and management plans. Together, these measures improve the resilience of fishing communities and help sustain aquatic ecosystems under a changing

climate. The climate change significantly affects water quality, species health and aquaculture stability, requiring climate-smart aquaculture approaches⁶¹.

8.4. Resilience factors (diversification, community practices, and early warning systems)

Cambodia’s fisheries sector shows several resilience factors that help communities cope with climate variability, hydrological change, and livelihood pressures. Diversification of income-through small-scale aquaculture, rice–fish systems, home-based processing, and non-farm activities-provides households with alternatives when wild fish catches decline. Strong community-based practices, particularly through Community Fisheries (CFi) groups, enhance co-management, improve enforcement, protect flooded forests, and support habitat restoration in the Tonlé Sap and Mekong-Bassac systems. Early warning systems and climate information services, supported by the Government and development partners, are increasingly used to inform fishers about floods, storms, and hydrological fluctuations, allowing safer fishing and better planning of harvesting and aquaculture activities. Combined, these resilience strategies strengthen the adaptive capacity of Cambodia’s small-scale fishers and reduce vulnerability to climate shocks and ecosystem change⁶².

9. Governance and Policy Framework

9.1. Overview of national fisheries and aquaculture policies

Cambodia’s national fisheries and aquaculture policies emphasize sustainable resource management, stronger community participation, and modernization of the sector to support rural livelihoods and food security. Recent reforms focus on co-management, aquaculture expansion, habitat protection, climate adaptation, and improved post-harvest value chains. The National Strategic Plan for Aquaculture Development (2016–2030) provides Cambodia with a long-term roadmap for sustainable aquaculture growth⁶³. The table below gives key legislation.

Table 9.1: Key Legislation related to fisheries

Policy / Framework	Year	Main Focus / Key Elements	Lead Agency
Fisheries Law	2006	Legal basis for fisheries management; conservation of aquatic resources; protection of flooded forests; licensing & enforcement; community-based management provisions.	MAFF / Fisheries Administration (FiA) ⁶⁴
Abolition of Commercial Fishing Lots	2012	Transition of fisheries governance to community-based management; expansion of Community Fisheries (CFi) areas; improved access for small-scale fishers.	Royal Government of Cambodia / FiA ⁶⁵

Policy / Framework	Year	Main Focus / Key Elements	Lead Agency
Strategic Planning Framework for Fisheries (SPF) 2015–2024	2015	Sustainable fisheries management, aquaculture development, post-harvest upgrading, ecosystem protection, livelihoods diversification.	FiA / MAFF ⁶⁶
National Aquaculture Development Strategy	Various updates	Smallholder aquaculture development; improved seed and feed systems; disease control; biosecurity; climate-resilient aquaculture.	FiA / MAFF
Climate Change Strategic Plan & Related Adaptation Plans	Ongoing	Integrating fisheries into climate adaptation; resilient aquaculture; habitat protection; early warning systems.	Ministry of Environment / FiA
National Strategy for Food Security and Nutrition (NSFSN) 2024–2028	2024	Recognizes fish as essential to nutrition; promotes sustainable aquatic food systems; supports value-chain improvements.	Council for Agricultural and Rural Development (CARD) ⁶⁷
CAPFISH (Capture & Aquaculture) – EU-funded Programme	2018–2024	Modernization of fisheries value chains; improved post-harvest systems; food safety, HACCP, traceability; digital tools (CamTrace, eACDS).	MAFF / FiA with EU & UNIDO ⁶⁸

9.2. Food safety and quality assurance systems

Cambodia’s fisheries and aquaculture value chains are managed through a multi-layered institutional structure led by the Ministry of Agriculture, Forestry and Fisheries (MAFF), with the Fisheries Administration (FiA) responsible for regulation, licensing, monitoring, and implementing national strategies across capture, aquaculture, and post-harvest subsectors. FiA operates through central, cantonment, divisional, and district offices, supported by Community Fisheries (CFi) organizations that co-manage local resources and oversee artisanal landing, processing, and marketing practices. The Council for Agricultural and Rural Development (CARD) provides coordination for food security and nutrition, including fish value-chain integration in national plans. Development partners, such as the EU through CAPFISH, UNIDO, FAO, and WorldFish-support institutional strengthening, food safety systems, HACCP compliance, traceability tools (CamTrace, eACDS), and SME upgrading. Local authorities, women’s producer groups, and cooperatives also play important roles in post-harvest management, market access, and community-level enforcement. Together, these institutions

coordinate governance, value-chain development, and sector modernization across Cambodia's inland and marine fisheries⁶⁹.

9.3. Participation in international agreements (e.g., WTO fisheries subsidies, PSMA, CITES)

WTO Fisheries Subsidies

Cambodia is an active Member of the World Trade Organization (WTO) and participates in the WTO Agreement on Fisheries Subsidies negotiations, which aim to eliminate subsidies that contribute to overcapacity, overfishing, and illegal, unreported, and unregulated (IUU) fishing. Cambodia has supported disciplines that promote sustainable fishing and is preparing for implementation through national policy adjustments as the agreement enters the ratification phase globally⁷⁰.

Port State Measures Agreement (PSMA)

Cambodia is a Party to the FAO Port State Measures Agreement (PSMA), having acceded in December 2019. Through PSMA, Cambodia is strengthening port inspection, vessel monitoring, and denial of port entry for vessels suspected of engaging in IUU fishing. The agreement supports Cambodia's efforts to curb illegal fishing in the Gulf of Thailand and align national controls with international best practices⁷¹.

CITES (Convention on International Trade in Endangered Species)

Cambodia is a Party to CITES and regulates the international trade of protected aquatic species, including sharks, rays, and ornamental fish. National authorities issue permits and enforce non-detriment findings to ensure that exports do not threaten species survival. Cambodia also participates in regional CITES initiatives to strengthen capacity for monitoring and compliance⁷².

The country is party to the following key Conventions:

- [Convention on Biological Diversity \(CBD \)](#)
- [Nagoya Protocol on Access to Genetic Resources and their Fair and Equitable Sharing of Benefits Arising from their Utilization to the Convention on Biological Diversity](#)
- [Convention on Wetlands of International Importance especially as Waterfowl Habitat \(Ramsar\)](#)
- [United Nations Framework Convention on Climate Change \(UNFCCC \)](#)
- [Kyoto Protocol to the United Nations Framework Convention on Climate Change](#)
- [Paris Agreement](#)

9.4. Institutional arrangements for managing value chains

Cambodia's fisheries and aquaculture value chains are governed primarily by the Ministry of Agriculture, Forestry and Fisheries (MAFF), with the Fisheries Administration (FIA) responsible for regulation, licensing, inspection, aquaculture development, and post-harvest oversight through its central, cantonment, divisional, and district offices. Community Fisheries (CFi) organizations play a co-management role at the local level, supporting landing oversight,

habitat protection, and small-scale processing practices. National coordination on food security, nutrition, and value-chain integration is led by the Council for Agricultural and Rural Development (CARD). Development partners-including the EU, UNIDO, FAO, and WorldFish-support modernization of value chains through programmes such as CAPFISH, which strengthen HACCP systems, traceability (CamTrace, eACDS), SME upgrading, and post-harvest improvements. Together, these institutions create a multi-tiered governance system spanning national regulation, local co-management, and value-chain modernization⁷³.

10. Key Challenges and Opportunities

10.1. Most pressing constraints (production, markets, nutrition, gender, governance)

Production:

- Inland capture declining due to hydrological change, habitat degradation, overfishing, and reduced CPUE
- Weak cold chain: lack of ice, insulated containers, hygienic landing sites
- Limited aquaculture

Markets:

- Export competitiveness limited by barriers
- Fragmented supply chains
- Domestic markets face seasonal shortages
- High dependence on imports from Thailand/Vietnam

Nutrition:

- Persistent micronutrient deficiencies
- Wasting remains at ~10% despite improved stunting rates
- Seasonal variability in fish availability reduces year-round nutrition access

Gender:

- Women face limited access to finance, technology, training, and mobility constraints
- Women's roles in processing and trade undervalued and under-recorded in official statistics

Governance:

- Weak enforcement of regulations
- Fragmented coordination across FiA, CARD, local authorities, and development partners
- Limited monitoring of stock status, water quality, and post-harvest hygiene

10.2. Promising opportunities or best practices that could be scaled up

Production:

- Expansion of smallholder aquaculture, resilient systems (rice–fish, pond, cage)
- CAPFISH support for improved post-harvest, cold chain, and processing technologies
- Community Fisheries (CFi) management showing localized recovery of stocks

Markets:

- CamTrace and eACDS digital traceability systems already piloted and scalable nationally
- Strong demand for low-cost freshwater species in domestic markets supporting inclusive value chains
- Opportunities from ASEAN tariff reductions

Nutrition:

- Very high per-capita fish consumption (63 kg/yr) enabling nutrient-dense diets
- Small indigenous fish species (SIS) consumed whole
- Traditional preserved products (prahok, dried/smoked fish) provide year-round access

Gender:

- Women own 61.2% of MSMEs nationally—strong base for scaling fish processing enterprises
- High female participation in household and micro-processing
- Opportunities for formalising producer groups, cooperatives, and women-led post-harvest SMEs
-

Governance:

- Strong policy foundation: Fisheries Law, climate adaptation plans
- PSMA membership strengthens port controls and anti-IUU action

11. Priority Policy Recommendations

11.1. Key actionable policy recommendations linking aquatic foods, value chains and Food Security and Nutrition (FSN - six dimensions)

Table 11.1: Recommendations and priority actions - for the six dimensions

	Dimension	Recommendation	Rationale	Priority actions
1	Fish Loss & Waste (FLW)	Upgrade cold-chain and hygienic handling at landing sites and transport nodes	Losses of ~25–35% due to lack of ice, poor insulation, delayed handling, insect contamination, and high temperatures.	<ul style="list-style-type: none"> • Provide subsidised ice and insulated boxes for small-scale actors. • Upgrade landing sites with shade,

	Dimension	Recommendation	Rationale	Priority actions
				clean sorting areas, potable water. <ul style="list-style-type: none"> • Promote fish-handling SOPs using CAPFISH training modules
		Improve small-scale processing technologies	Traditional drying/fermenting often suffers from contamination, uneven drying, and losses in quality.	<ul style="list-style-type: none"> • Introduce raised or solar dryers, improved fermenting vats, hygienic racks. • Support MSMEs (esp. women-led) with equipment grants
		Expand community-based storage and aggregation centres	Lack of rural cold rooms and storage increases spoilage and reduces incomes.	<ul style="list-style-type: none"> • Pilot solar-powered cold rooms in Tonlé Sap communities. • Organize producer groups for collective storage and bulk sales.
2	Gender Inclusion	Strengthen women-led post-harvest and MSME enterprises	Women own 61.2% of MSMEs yet face barriers to finance, training, and technology	<ul style="list-style-type: none"> • Provide gender-targeted MSME upgrading grants. • Offer business, HACCP, and digital training to women processors/traders
		Improve access to finance for women in fisheries value chains	Women rely on informal lenders due to collateral barriers.	<ul style="list-style-type: none"> • Develop microfinance windows for fish processing/trading. • Support savings groups and cooperatives.
		Strengthen gender-responsive data and recognition	Women's roles remain undervalued and poorly captured in statistics.	<ul style="list-style-type: none"> • Include sex-disaggregated data in FiA monitoring. • Conduct gender audits in CFis and value chains.

	Dimension	Recommendation	Rationale	Priority actions
3	Compliance & Trade Readiness	Scale HACCP/GMP adoption among processors	Few enterprises are certified; SPS barriers limit export growth.	<ul style="list-style-type: none"> • Provide HACCP coaching to SMEs. • Expand accredited lab services in provinces.
		Expand digital traceability systems	Inland multispecies supply chains lack documentation; high-value markets require traceability.	<ul style="list-style-type: none"> • Roll out QR-coded batch tracking for aquaculture. • Integrate inland landing data into CamTrace.
		Strengthen IUU controls and port inspection systems	Coastal areas still at risk; PSMA obligations require stronger monitoring.	<ul style="list-style-type: none"> • Increase inspectors, VMS use, and port checks. • Public–private compliance awareness campaigns.
4	Environmental Sustainability	Protect and restore inland and coastal habitats	Floodplain degradation, wetland loss, sand mining, and mangrove decline threaten stocks.	<ul style="list-style-type: none"> • Strengthen flooded forest protection. • Mangrove restoration in coastal provinces.
		Reduce pollution and waste from processing and gear	Plastic leakage and wastewater from processing clusters degrade aquatic environments.	<ul style="list-style-type: none"> • Install wastewater treatment at processing centres. • Promote biodegradable gear and gear-retrieval incentives.
		Promote eco-friendly and low-carbon fishing practices	Fuel-intensive fleets raise carbon footprint; inland systems vulnerable to climate impacts.	<ul style="list-style-type: none"> • Fuel-efficient gear and motor upgrades. • Encourage LED-lights, selective gear, and no-destructive gear.
5	Nutrition Contribution	Scale availability and affordability of nutrient-rich small fish (SIS)	SIS provide Ca, Fe, Zn, B12, DHA/EPA; eaten whole; crucial for children’s diets.	<ul style="list-style-type: none"> • Promote SIS-focused aquaculture and rice–fish systems. • Support dried/SIS powders for

	Dimension	Recommendation	Rationale	Priority actions
				maternal/child nutrition.
		Improve safety and quality of fish-based foods	High contamination risk in traditional drying/fermentation.	<ul style="list-style-type: none"> • Upgrade prahok/dried fish units with hygienic racks and packaging. • Train processors on microbial-safe handling.
		Integrate fish into national nutrition and school-feeding programmes	Only 32% of children meet minimum dietary diversity.	<ul style="list-style-type: none"> • Use dried/powdered SIS in school meals. • Promote fish-based complementary foods.
6	Climate Resilience & Readiness	Promote climate-resilient aquaculture systems	Inland systems vulnerable to droughts, hydrological variation, and temperature changes.	<ul style="list-style-type: none"> • Disseminate climate-resilient seed, improved pond design, and biosecurity. • Expand rice - fish and integrated systems.
		Strengthen early warning systems for fishers and aquaculture farms	Extreme weather events and Mekong flow variability endanger livelihoods.	<ul style="list-style-type: none"> • Hydrological and storm alerts via mobile. • Local risk-mapping in CFi areas.
		Diversify livelihoods for fishing communities	Reduced catches, climate shocks, and boom–bust cycles increase vulnerability.	<ul style="list-style-type: none"> • Support aquaculture, processing enterprises, ecotourism, and non-farm options. • Provide vocational training for youth and women.

11.2. Recommendations (specific, feasible, and linked to national priorities)

Table 11.2: Recommendations for the six dimensions linked to national priorities

	Dimension	Recommendation	Linked National Priorities
1	Fish Loss & Waste (FLW)	Upgrade cold-chain and hygienic handling at landing sites and transport nodes	<ul style="list-style-type: none"> • CAPFISH Post-Harvest Programme • SPF 2015–2024 (Post-harvest upgrading)
		Improve small-scale processing technologies	<ul style="list-style-type: none"> • CAPFISH • NSFSN 2024–2028 (food safety, value chains)
		Expand community-based storage and aggregation centres	<ul style="list-style-type: none"> • CFi co-management framework • CARD coordination (NSFSN)
2	Gender Inclusion	Strengthen women-led post-harvest and MSME enterprises	<ul style="list-style-type: none"> • CAPFISH Gender Action Plan • NSFSN 2024–2028
		Improve access to finance for women in fisheries value chains	<ul style="list-style-type: none"> • MAFF–FiA MSME schemes • NGO partner women’s economic empowerment programmes
		Strengthen gender-responsive data and recognition	<ul style="list-style-type: none"> • FiA Gender Mainstreaming Strategy
3	Compliance & Trade Readiness	Scale HACCP/GMP adoption among processors	<ul style="list-style-type: none"> • CAPFISH (UNIDO) • Law on Standards of Cambodia (ISC)
		Expand digital traceability systems	<ul style="list-style-type: none"> • CamTrace • SEAFDEC eACDS • PSMA implementation
		Strengthen IUU controls and port inspection systems	<ul style="list-style-type: none"> • PSMA (2019) • Fisheries Law 2006
4	Environmental Sustainability	Protect and restore inland and coastal habitats	<ul style="list-style-type: none"> • SPF 2015–2024 • Climate Change Strategic Plan
		Reduce pollution and waste from processing and gear	<ul style="list-style-type: none"> • MAFF/FiA environmental guidelines • CAPFISH post-harvest
		Promote eco-friendly and low-carbon fishing practices	<ul style="list-style-type: none"> • National climate strategies • FiA sustainable fisheries plans
5	Nutrition Contribution	Scale availability and affordability of nutrient-rich small fish (SIS)	<ul style="list-style-type: none"> • NSFSN 2024–2028 • CARD nutrition initiatives

	Dimension	Recommendation	Linked National Priorities
		Improve safety and quality of fish-based foods	<ul style="list-style-type: none"> • CAPFISH • ISC food safety standards
		Integrate fish into national nutrition and school-feeding programmes	<ul style="list-style-type: none"> • NSFSN • MoEYS school feeding
6	Climate Resilience & Readiness	Promote climate-resilient aquaculture systems	<ul style="list-style-type: none"> • National Aquaculture Development Strategy • Climate Change Strategic Plan
		Strengthen early warning systems for fishers and aquaculture farms	<ul style="list-style-type: none"> • Ministry of Environment climate services • FiA community extension
		Diversify livelihoods for fishing communities	<ul style="list-style-type: none"> • Cfi co-management • NSFSN (resilience & livelihoods)

12. Provide the traffic-light scoring for the six key dimensions

Table 12.1: Traffic-light score for the six dimensions

	Dimension	Score	Colour	Reason
1	Fish Loss & Waste (FLW)	2		<ul style="list-style-type: none"> • High losses (25 - 35%) due to inadequate ice, poor handling, weak cold chain, exposure to heat, and contamination at drying/ fermenting sites. • Some progress under CAPFISH, but coverage remains small relative to need.
2	Gender Inclusion	3		<ul style="list-style-type: none"> • Women own 61.2% of MSMEs and dominate post-harvest roles • Women face barriers to finance, mobility, technology, and are under-represented in statistics; gender roles undervalued.
3	Compliance & Trade Readiness	3		<ul style="list-style-type: none"> • HACCP-certified enterprises exist but are few; SPS compliance gaps remain • Traceability tools (CamTrace, eACDS) piloted but not yet widely scaled
4	Environmental Sustainability	2		<ul style="list-style-type: none"> • Inland fisheries face declining CPUE, habitat degradation, sand mining, hydropower impacts, and wetland loss. • Coastal ecosystems suffer from mangrove loss, pollution, sedimentation.
5	Nutrition Contribution	4		<ul style="list-style-type: none"> • Very high fish consumption, • Fish provides >3/4 of animal-source protein

	Dimension	Score	Colour	Reason
				<ul style="list-style-type: none"> • SIS for nutrition
6	Climate Resilience & Readiness	3		<ul style="list-style-type: none"> • High vulnerability to climate change (hydrological shifts, flood variability, drought, coastal erosion) • Adaptation efforts expanding but not yet at scale.

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