

Summary Report on Mapping of Marketing Initiatives by CSOs in Cambodia

A Report by CEDAC to AsiaDHRRA

Linking Small Farmers to Market

1) Description

In Cambodia there is a limited number of marketing initiatives by Civil Society Organizations. The estimated number is 40 and our survey covers 10 initiatives which represent 25%. During the March 2008, the Marketing Officer used a standard survey format discussed by PMT to conduct the survey. However, the survey information collected mostly based on the primary data provided by the Marketing Inter-mediators or market players of agriculture commodities. Moreover, referral method is used to select the sample of this survey. The survey covers only 10 crops or 7 Marketing initiatives by 7 CSOs in Cambodia. Some data are estimated based on the old sources from the Ministry of Agriculture, Forestry and Fishery. The data on national volume of production are very difficult to find in Cambodia where research documents are not rare.

2) Map of CSO Marketing Initiative resulting from the survey as shown in the tables below.

Table 1 Summary of CSO Marketing Initiative on Rice

Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product 2007 in Kilograms
Marketing Initiative 1	Rice	3,600	158,181,000
Marketing Initiative 2	Rice	900	25,000,000
Total		4,500	183,181,000

Table 2 Percentage of CSO Marketing in Rice vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
183,181,000	2,322,014,000	0.78%

Table 3 Percentage of Farmers Involved in CSO Marketing of Rice

Total Number of Farmers Involved	Total Number of Rice Farmers in Cambodia	Percentage of Farmers Involved in CSO Rice Marketing
4,500	1,700,000	0.26%



Pa Ay Market
Supported by Heng
Sekmeas

NAP
Supported by CEDAC
Organic Rice

Table 4 Summary of CSO Marketing Initiative on Palm Wine

Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Lites
Marketing Initiative 1	Palm Wine	100	1,000,000L
Total		100	1,000,000L

Table 5 Percentage of CSO Marketing in Palm Wine vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
1000,000L	28,410,000L	0.35%

Table 6 Percentage of Farmers Involved in CSO Marketing of Palm Wine

Total Number of Farmers Involved	Total Number of Palm Wine Farmers in Cambodia	Percentage of Farmers Involved in CSO Palm Wine Marketing
100	18,000	0.55%



Star Mart, AROSA Market & Exported to Korai, Japan, Vietnam
Supported by Confirel Non- Organic

Table 7 Summary of CSO Marketing Initiative on Vegetables

Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Kilograms
Marketing Initiative 1	Vegetable	51	1,700
Marketing Initiative 2	Vegetable	115	24,000
Total		166	25,700

Table 8 Percentage of CSO Marketing of Vegetables vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
25,700	90,000,000	0.029%

Table 9 Percentage of Farmers Involved in CSO Marketing of Vegetables

Total Number of Farmers Involved	Total Number of Vegetable Farmers in Cambodia	Percentage of Farmers Involved in CSO Vegetable Marketing
166	686,000	0.024%

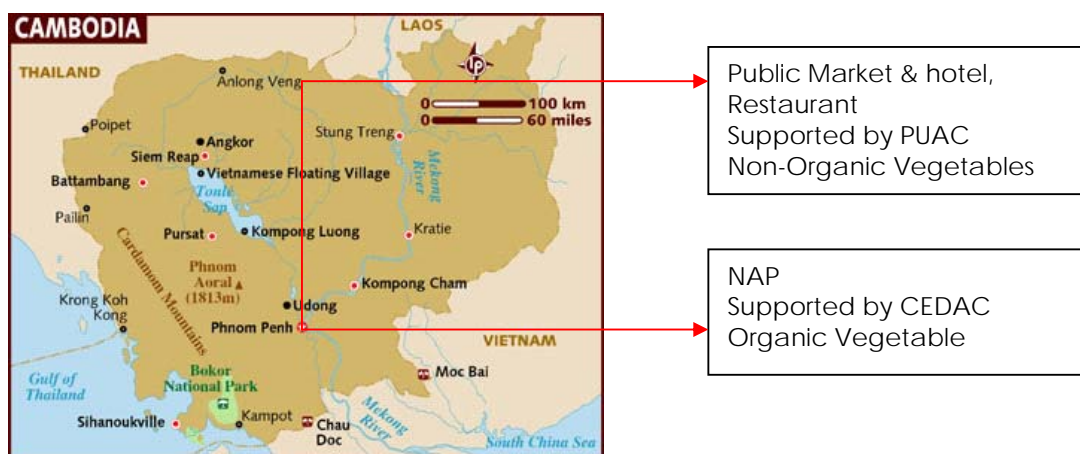


Table 10 Summary of CSO Marketing Initiative on Guava

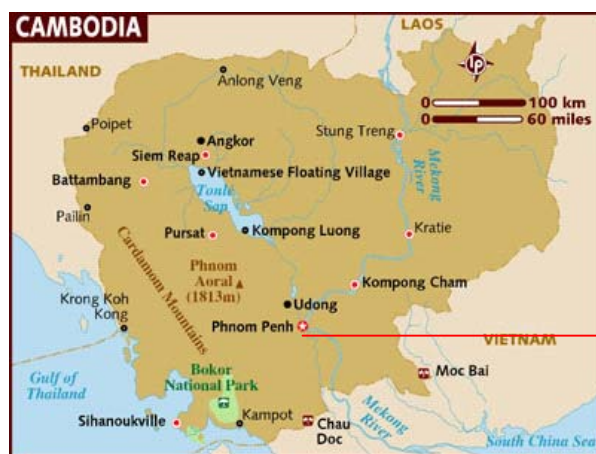
Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Kilograms
Marketing Initiative 1	Guava	15	3,500
Total		15	3,500

Table 11 Percentage of CSO Marketing in Guava vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
3,500	2,062,000	0.17%

Table 12 Percentage of Farmers Involved in CSO Marketing of Guava

Total Number of Farmers Involved	Total Number of Guava Farmers in Cambodia	Percentage of Farmers Involved in CSO Guava Marketing
15	19,600	0.076%



NAP&v, AROSA market, Star mart
Supported by Khmer Mekong

Table 13 Summary of CSO Marketing Initiative on Chicken

Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Kilograms
Marketing Initiative 1	Chicken	200	14,560
Total		200	14,560

Table 14 Percentage of CSO Marketing in Chicken vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
14,560	1,500,000	0.97%

Table 15 Percentage of Farmers Involved in CSO Marketing of Chicken

Total Number of Farmers Involved	Total Number of Chicken Farmers in Cambodia	Percentage of Farmers Involved in CSO Chicken Marketing
200	942,000	0.21%



NAP & Country Bird Country Restaurant
Supported by CEDAC

Table 16 Summary of CSO Marketing Initiative on Pineapple, Guava, Mango Juice and Tamarind Drink

Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Kilograms
Marketing Initiative 1	Juice	10	3,500
Total		10	3,500

Table 17 Percentage of CSO Marketing in Juice vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
3,500	16,348,000	0.21%

Table 18 Percentage of Farmers Involved in CSO Marketing of Juice

Total Number of Farmers Involved	Total Number of Juice Farmers in Cambodia	Percentage of Farmers Involved in CSO Juice Marketing
10	100,100	0.10%



Star Mart, NAP & Public Market
in Phnom Penh.
Supported by Khmer Mekong
Food
Organic Juice

Table 19 Summary of CSO Marketing Initiative on Mango, Pineapple, Payapa, Jam.....Fruit

Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Kilograms
Marketing Initiative 1	Fruit	50	7,800
Total		50	7,800

Table 20 Percentage of CSO Marketing in Fruit vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
7,800	9,172,000	0.85%

Table 21 Percentage of Farmers Involved in CSO Marketing of Fruit

Total Number of Farmers Involved	Total Number of Fruit Farmers in Cambodia	Percentage of Farmers Involved in CSO Fruit Marketing
50	100,000	0.5%

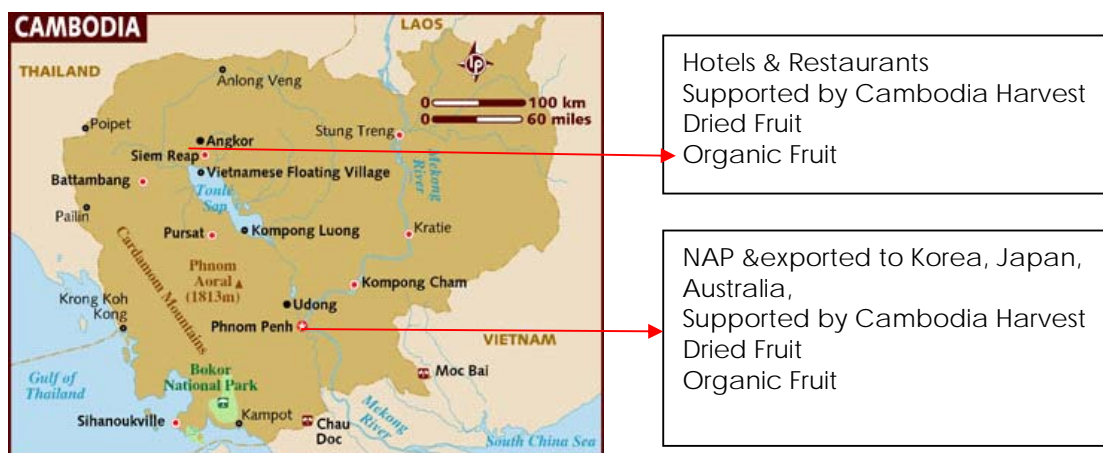


Table 22 Summary of CSO Marketing Initiative on Black, white, Dry Pepper

Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Kilograms
Marketing Initiative 1	Pepper	15	3,000
Marketing Initiative 2		10	2,500
Total		25	5,500

Table 23 Percentage of CSO Marketing in pepper vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
5,500	11,538,000	0.47%

Table 24 Percentage of Farmers Involved in CSO Marketing of Pepper

Total Number of Farmers Involved	Total Number of pepper Farmers in Cambodia	Percentage of Farmers Involved in CSO pepper Marketing
25	500	0.5%

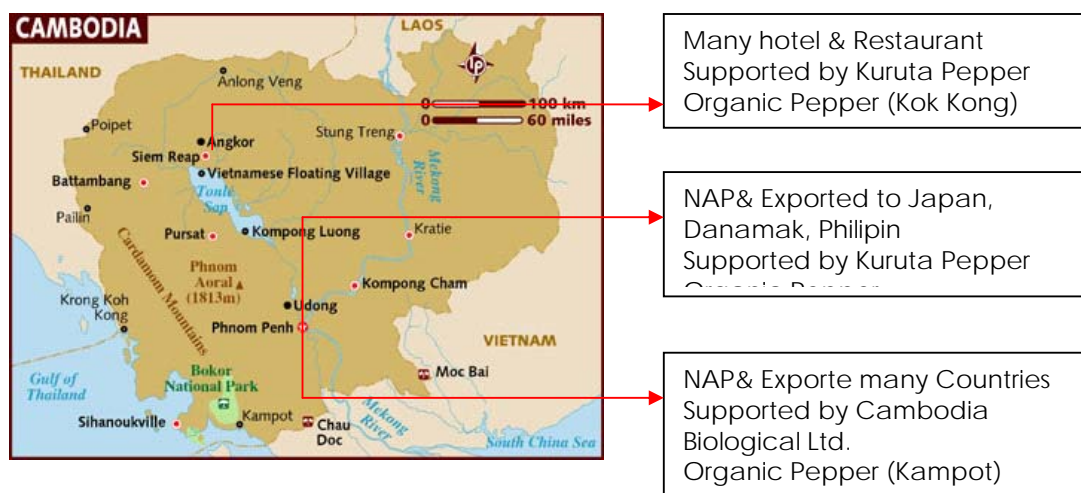


Table 25 Summary of CSO Marketing Initiative on Sugar Palm

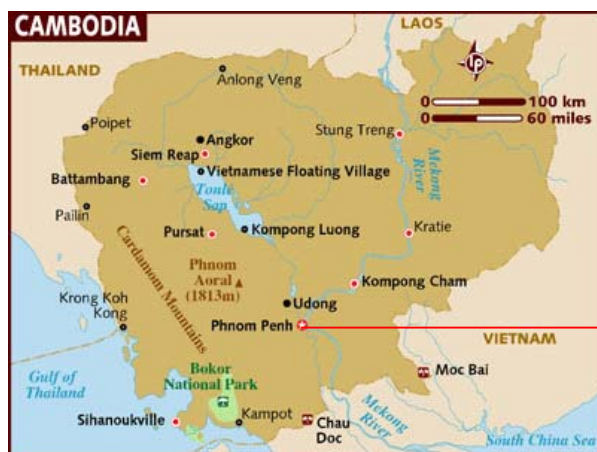
Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Kilograms
Marketing Initiative 1	Sugar Palm	100	3,500
Total		100	3,500

Table 26 Percentage of CSO Marketing in Sugar Palm vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
3,500	1,500,000	0.23%

Table 27 Percentage of Farmers Involved in CSO Marketing of Sugar Palm

Total Number of Farmers Involved	Total Number of Sugar Palm Farmers in Cambodia	Percentage of Farmers Involved in CSO Sugar Palm Marketing
100	270,000	0.37%



NAP Exported to Japan, Korai
Supported by Confirel Co.,Ltd
Organic Sugar Palm

Table 28 Summary of CSO Marketing Initiative on Cashew Nut

Marketing Initiative	Product	Number of Farmers Involved	Volume of Marketed Product (Year 2007) in Kilograms
Marketing Initiative 1	Cashew nut	100	50,000
Total		100	50,000

Table 29 Percentage of CSO Marketing in Cashew nut vis-à-vis Annual Production Volume

Total Annual Marketed Volume by CSO Initiatives	National Annual Production Volume	Percentage of CSO Marketed Volume
50,000	60,000,000	0.83%

Table 30 Percentage of Farmers Involved in CSO Marketing of Cashew nut

Total Number of Farmers Involved	Total Number of Cashew nut Farmers in Cambodia	Percentage of Farmers Involved in CSO Cashew nut Marketing
100	460,000	0.21%



NAP & Export

Supported by Cambodia
Biological CoLtd
Non- Organic

3) Analysis

According to below data, the percentage of each crop marketed by CSOs in Cambodia is a very small amount. It means that marketing intermediation for agriculture communities have not yet widely initiated by CSOs. There are therefore many opportunities for CSOs in linking small farmers to the market. However, many challenges to do so since there is no or less government support in this sectors. Irresponsible traders are gaining much profit in trading locally and internationally potential agriculture commodities.

The above marketed crops by CSOs have potentiality to enlarge its local and regional market.

For instance, the organic chicken is recommended to be a potential agri-product in Cambodia.

The following described reasons are justified conducive business environment for CEDAC to take this opportunity to widely trade this crop:

A. The growth potential:

It is a huge market demand in country, especially in Phnom Penh. 10MT a day of chicken meat is consumed by Phnom Penh people, mostly natural chicken raised by farmers. All markets in Cambodia are selling chicken meat. Food processing from chicken meat is only done by restaurants, not by other food producers. Reducing the gap of its value chain, CEDAC is able to easily entry into its potential organic chicken market.

B. The poverty reduction:

Marketing organic chicken for small farmers, CEDAC will create more job opportunities or help poor entrepreneurs to sustain their micro- business, especially chicken raising at household or village level. Women will be able to generate income from this job which requires low cost of investment and low technology skills.

C. The scope

Majority of Cambodian small farmers usually raise their chickens in a conventional way. Under different projects of CEDAC, they have been provided technical assistance to improve quality and quantity. So far, the farmers have been formed into producer group or cooperative entity. CEDAC first started introducing the chicken market in its Natural Agri-Product shop. The chicken farmer village associations can create their own slaughterhouses to supply organic chicken to city or provincial market.

D. Prospects of success

Organic chicken can be easily traded by CEDAC in the organic market which is a unique or new initiative in Cambodia. The created business environment is very attractive to many people in terms of food safety needs. CEDAC can also enlarge this market in main cities and provincial towns where middle class are looking for quality products or taking care of their health. Organic chicken is a

complementary organic product of NAP shop where organic rice and vegetables are available for their customers.

CEDAC has established its business program to promote the organic market. Several NAP shops and Country Bird restaurants run by this component will be the big market of the organic chicken.

E. Institutional or Program-related aspects:

Slaughterhouses formed by farmer village or cluster associations are consistent with the government policies to deal with bird flu. AIBC is a bird flu project carried out by the CEDAC Field program and supported by a few partners. Capacity building on chicken production will be subsidized by the project.

We, finally recommend to the Project Advisory Group to select organic chicken as a potential product for the immediate product for market intermediation along with its organic rice and fresh fruit vegetables.