



# Country Profile CAMBODIA

An overview of Cambodian agricultural sector



# Summary

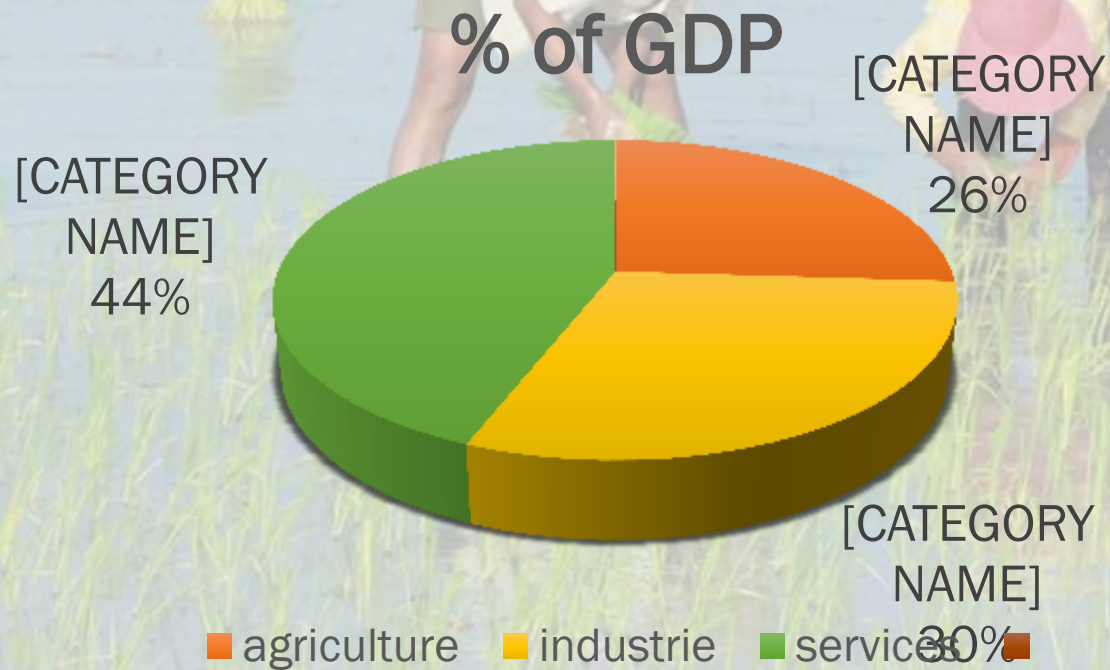
## Introduction

- 1- General figures on Cambodia agriculture and agricultural products
- 2- Towards an Agroecological transition ?
- 3- Government's strategy regarding Agroecology



# 1. GENERAL FIGURES ON CAMBODIA AGRICULTURE

## 1.2 Agriculture & GDP



➤ GDP: \$58.94 billion (2016 est.)

*106<sup>th</sup> / 230*

➤ GDP real growth rate: 7% (2016 est.)

*10<sup>th</sup> / 230*

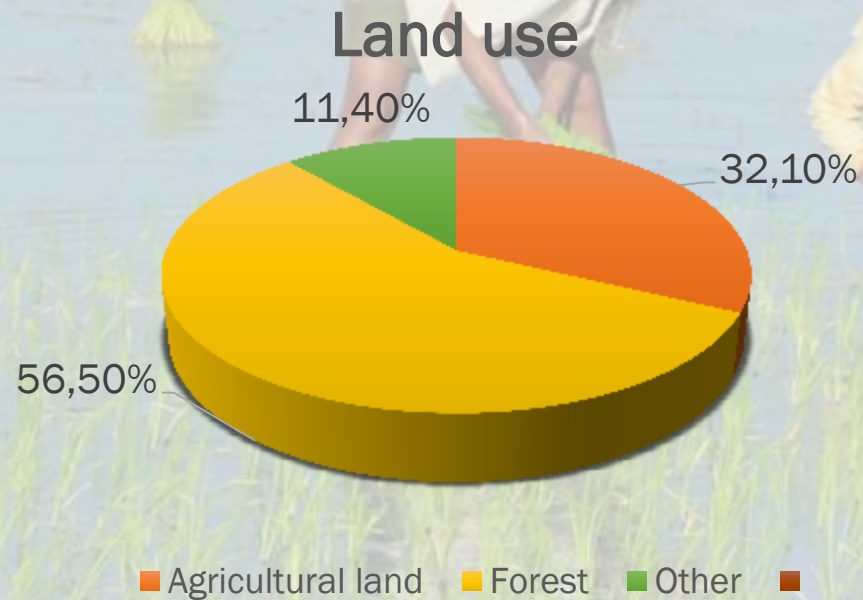
➤ GDP per capita: \$1158.7 (2015 est.)

*180<sup>th</sup> / 230*



# 1. GENERAL FIGURES ON CAMBODIA AGRICULTURE

## 1.2 Agriculture & GDP



Rice is the dominant crop in Cambodian agriculture.

→ more than 80 % of cultivated land  
→ the most important agricultural export commodity

**Agricultural products:** rice, rubber, corn, vegetables, cashews, cassava (manioc, tapioca), silk.



# 1. GENERAL FIGURES ON CAMBODIA AGRICULTURE

Figure 6: Cambodia Food Balance Sheet in 2012/2013

	Wet Season	Dry Season	Total
Cultivated Area in ha.	2,512,038	495,507	3,007,545
Destroyed Area in ha.	36,025	42	36,067
Replanting Area in ha.	8,819		8,819
Harvested Area in ha.	2,484,832	495,465	2,980,297
Yield in mt./ha.	2.872	4.349	3.117
<b>Paddy Rice Production in mt.</b>	<b>7,136,139</b>	<b>2,154,801</b>	<b>9,290,940</b>
Seed requirements and post-harvest losses (13%) in mt.			1,207,822
Remaining paddy available for consumption in mt.			8,083,118
Converted into milled rice (64% milling-rate) in mt.			5,173,195
Food requirement per year in mt.			2,142,178
<b>National Surplus Production of Rice in mt.</b>			<b>3,031,017</b>

Source: MAFF



# 1. GENERAL FIGURES ON CAMBODIA AGRICULTURE

## 1.2 Natural Assets

### Fishery

- Tonle Sap is the **Southeast Asia's largest freshwater lake**
- Cambodia possesses the **third largest inland fish capture** in the world
- **Over 30%** of the country consisting of either permanent or seasonal wetlands.
- Fish provides about **80% of animal protein** for the population

➡ The sustainability of this resource has been a massive concern as the demands for land and food have increased and disruption to previous natural river flow and floodplain connectivity has taken place, particularly to provide power and irrigation.

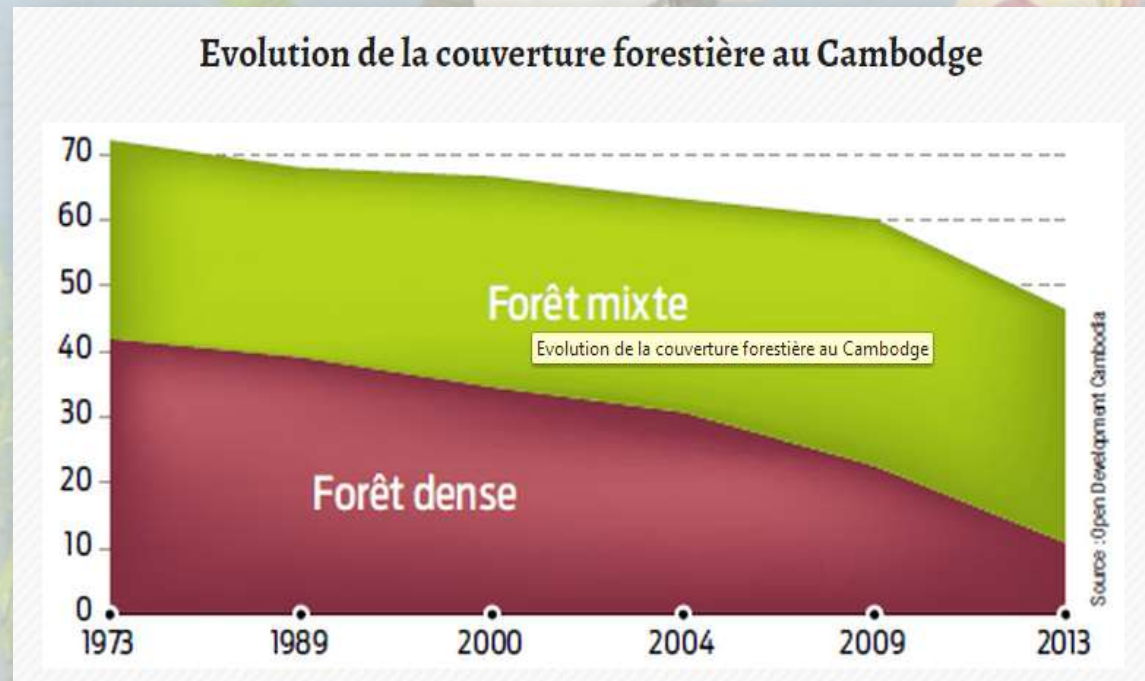




# 1. GENERAL FIGURES ON CAMBODIA AGRICULTURE

## 1.2 Natural Assets

### Forest



9.45 million hectares  
(FAO 2015), covering  
53% of the country's  
total territory.

➡ Forestland has been gradually declining over the last two decades for multiple reasons, mainly as a result of land conversion and expansion of agriculture.



# 1. GENERAL FIGURES ON CAMBODIA AGRICULTURE

Exports

Imports



## Exports partners:

- US 23.1%,
- UK 8.8%,
- Germany 8.2%,
- Japan 7.4%,
- Canada 6.7%,
- China 5.1%,
- Vietnam 5%,
- Thailand 4.9%,
- Netherlands 4.1% (2015)

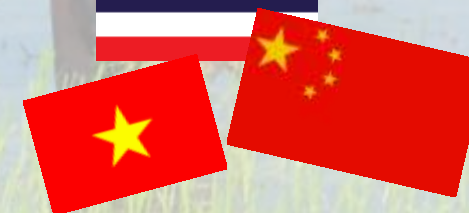
\$8,762 billion  
(2016)

Clothing, timber,  
rubber, rice, fish,  
tobacco, footwear

\$12,32 billion  
(2016)

Petrol, cigarettes,  
gold, construction  
materials, machinery

Motor vehicules,  
pharmaceutical  
products



## Import partners:

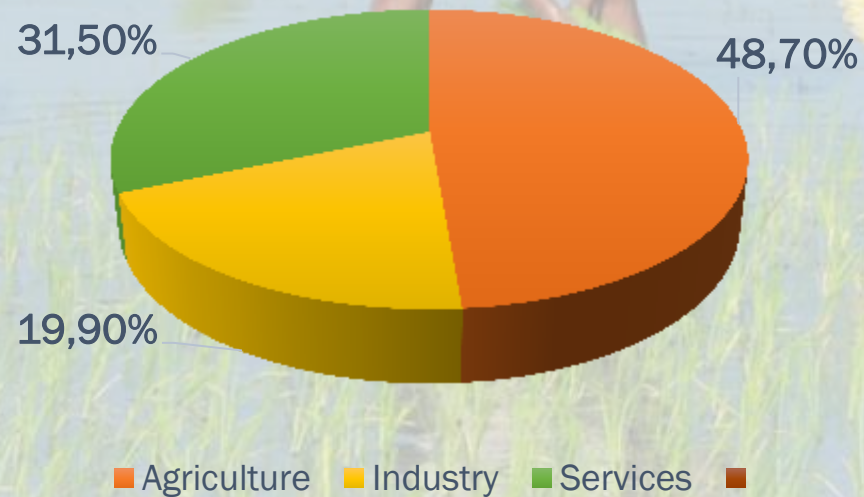
- Thailand 28.7%,
- China 22.2%,
- Vietnam 16.4%,
- Hong Kong 6.1%,
- Singapore 5.7% (2015)



# 1. GENERAL FIGURES ON CAMBODIA AGRICULTURE

## 1.4 Agriculture & Labor

### Labor force - by occupation



- Population: about **16,000,000** people
- Median ages: **24.9** years
- Population growth rate: **1.56%** (2016 est.)
- Urban population: **20.7%** of total population (2015)
- Rate of urbanization: **2.65%** annual rate of change (2010-15)
- Literacy: **77.2%** of total population



# SWOT

## Strenghts

- Rice surplus
- Well integrated food markets
- Resources availability
- Broad and multi-actor recognition of the importance of agriculture
- High demand: tourism & population growth

## Weaknesses

- Need for technical & financial support to improve productivity and diversification
- Low bargaining power for farmers
- Little information on markets for farmers
- Need for further training and support to agricultural extension workers
- Post harvest management

## Opportunities

- Expansion of private sector services supporting production
- Investments in agricultural infrastructures (irrigation and road)
- Community organisations are being established for all subsector producer and user groups

## Threats

- Little investment in agricultural sector from private sector
- Lack of facilities for prevention and elimination of livestock disease
- Competition over water use (fishery / hydropower)
- Deforestation, soil degradation, flood
- Undernutrition



## 2. TOWARDS AN AGROECOLOGICAL TRANSITION ?

### 2.1 Chemical industry

Table 3. Status of the agro-chemical industry in Cambodia, 2006-2007 and 2009-2010

Activity	2006-2007	2009-2010
Agricultural material Business Permit granted	22 companies	33 companies
Agricultural materials Registration Certificate granted	116 kinds of products items through 18 companies	403 kinds of products items through 42 companies
Agricultural material Importation License granted	27 companies	63 products through 51 companies
Fertilizers	123,258 tons/year	172,020.5 tons/year
Chemical Pesticides	532 tons/year	793 tons/year

(Ministry of Agriculture Forestry and Fisheries, April 2010)

➡ About **85%** pesticides in the country come from **Vietnam and Thailand** and the other **15%** from **China**.



## 2. TOWARDS AN AGROECOLOGICAL TRANSITION ?

### 2.2 Integrated Pest Management



National Integrated Pest Management (IPM) Programme

→ supported by NGO Forum, GTZ, CEDAC, Srer Khmer

Pesticide Reduction Network

By the end of 2013, the NIPMP had trained **918 IPM trainers** (38% female), **2,797 farmer trainers** (37% female) and **198,895 farmers** (47% female) in rice growing, vegetable gardening and crop planting



## 2. TOWARDS AN AGROECOLOGICAL TRANSITION ?

### 2.3 System of Rice Intensification



About **60,000 farmers** in 15 of Cambodia's 20 provinces engaged in the SRI program in 2006  
→ About **30%** of these farmers could be described as fully organic

German Technical Cooperation (GTZ), compared SRI farmers with control groups in five provinces

- 1) Incomplete SRI practices among SRI farmers, but with substantial results;
- 2) Higher yields than control groups: 41% increase;
- 3) More or less labor-neutral with respect to family labor but more labor-intensive in the earlier years;
- 4) Gross profits are higher than conventional farmers: \$120 per hectare vs. \$209 per hectare, or a 74% increase.

Following this analysis, if **10%** of Cambodian rice farmers converted **42% of the rice area** to SRI, the economic benefit to the nation would be **\$36 million**.



## 2. TOWARDS AN AGROECOLOGICAL TRANSITION ?

### 2.4 Conservation Agriculture



- Conservation Agriculture (CA) has been introduced to Cambodia in 2004
- **Conservation Agriculture Service Center (CASC)**  
→ research station in Chamcar Leur, Kampong Cham,
- CASC is supporting a network of farmer group of **90 households** from **6 villages** in Rattanak Mondul district and **2 villages** in Samlot district



## 2. TOWARDS AN AGROECOLOGICAL TRANSITION ?

### 2.5 Organic Agriculture

Cambodia devoted  
**only 0.15%** of its  
agricultural land to  
organic agriculture

CEDAC estimates that **5,400 ha** of  
**paddies** are organic (**only 0.02%** of  
the total paddy land) and only  
around **5,000** of the **1.8 million** rice  
**farmers** practice organic farming

- **10 shops** called CEDAC Natural Agri-Products to boost organic agriculture development
- **75,100 families** are applying ecologically **756 families'** members agricultural innovation and techniques, and **93 organic rice producer groups** comprised of have been established





### 3. GOVERNMENT'S STRATEGY REGARDING AGROECOLOGY

➡ Agriculture = **one of the four priority areas** for the government for sustainable development

Promotion of agricultural productivity and diversification by land intensification, not through cultivated land expansion.

Key national policy frameworks towards Agroecology:

- Enhancing value added of milled rice production and export
- Enhancement of **soil fertility management**, promotion of **integrated crop management**, of **GAP**, and research on **conservation agriculture (CA)**
- Encouraging the **use of organic** fertilizer and proper use of chemical fertilizer to maintain and improve soil fertility.
- The launching of **Rice Policy** in 2010
- Recognition of the role of improved seed varieties, SRI, use of locally available organic inputs (manure, compost), and IPM in enhancing productivity of small holder farms in a sustainable way (**low inputs strategy**)





Thank you for your attention !



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