Consumer Awareness on Food Standards in Cambodia

06 December 2018 | Phnom Penh, Cambodia

Results of Country Surveys conducted by GIZ and Consumers International (CI) in 2017/2018
General Background
Food safety is an important topic for several countries in the ASEAN region.

- Each year, an estimated 5 billion cases of diarrhea were reported globally in children above 5 years, of which 3.2 billion were from Southeast Asia.

For many of these countries, in particular the CLMV, the agricultural and food-processing sector also means an important source of livelihoods for the people and a leading export sector.

Unfortunately, in several ASEAN countries, esp. the CLMV, the consumer protection systems, including official mechanisms for ensuring food safety, are still at a nascent stage.

- The significance of industry voluntary actions such as compliance with international standards, risk management throughout the production chain, and other sustainable & ethical business conducts.

- The need to provide consumers with information and raise awareness.
In 2017-early 2018, GIZ commissioned Consumers International (CI) to conduct a series of country surveys in three countries of the ASEAN region, viz. Cambodia, Myanmar and Vietnam.

The surveys were aimed at evaluating consumer awareness, knowledge, attitude and perception (AKAP) on organic and GAP (Good Agricultural Practices) certified products in ASEAN, with a view to building the foundation for future capacity building activities.

The surveys were conducted by CI in coordination with local partners:

- Cambodia: Cambodian Institute for Research and Rural Development (CIRD)
- Myanmar: Myanmar Consumers Union (MCU)
- Vietnam: Vietnam Consumers and Standards Association (VINASTAS)
Methodology & Process
Main target group: middle-income consumers residing in urban centers/main cities of the three countries

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<thead>
<tr>
<th></th>
<th>Low income</th>
<th>Lower to middle income</th>
<th>Middle and higher income</th>
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<tbody>
<tr>
<td>Cambodia</td>
<td>&lt; US$200 per month</td>
<td>US$200-250</td>
<td>US$350-700</td>
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<tr>
<td></td>
<td></td>
<td>US$250-350</td>
<td>&gt; US$700</td>
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City: Phnom Penh

Sample size: at least 150 individual consumers, randomly selected at 04 types of locations (with equal divisions)
  • Unorganised wet markets
  • Organised wet markets
  • Organic stores
  • Grocery stores located at higher-end shopping malls

Methods: Direct interviews in local language at point-of-sale using a common structured questionnaire (adapted according to country context)
The questionnaire comprises of:

- 02 screening questions (to ensure relevance)
  - Whether the respondents were mainly or jointly responsible for buying food and grocery items in their households
  - Whether they have ever heard of either the terms ‘organic’ and ‘GAP’

- 06 questions on demographic information:
  - In addition to survey locations and income groups, analysis were later done also according to demographic information (gender, age and education level)

- 19 substantive questions on different aspects of consumer AKAP regarding organic and GAP-certified products
Demographic snapshot of respondents in Cambodia

**Total sample**
152

**Gender**
- 18% male
- 82% female

**Education**
- Secondary - high school: 39%
- College & Uni: 35%

**Three largest age group**
- 25-34 yrs: 34%
- 35-44 yrs: 26%
- 45-54 yrs: 18%

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<tbody>
<tr>
<td></td>
<td>5%</td>
<td>9%</td>
<td>22%</td>
<td>32%</td>
<td>32%</td>
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Survey Results
Motivation: 90.13% of Cambodian consumers participating in our survey indicated their concerns for health as the most important factor influencing purchase decisions and practices vis-a-vis food stuffs and groceries.

Elements considered while buying foods & vegetables:
- Health & safety: 84%
- Price/affordability: 45%
- Brand-name: 38%
- Taste: 36%
- Availability: 32%
- Certification of origin/quality: 27%
The concerns for health accordingly affect their **Perceptions** regarding organic and GAP-certified products

- 96.7% thought organic = **natural**
- 97% thought GAP = **safe food products**
- 81.6% believed organic foods are **healthy** while 84% believed GAP products are so
- 44.7% thought organic products are **free from chemicals** and 22% thought so of GAP products
Most popular **Sources of Information** used by consumers

**For organic products:**
- 45% favoured television and radio programmes
- 38% words of mouth
- 36% use the Internet to search for information

**For GAP products:**
- 49% TV and radio programmes
- 37% the Internet
- 35% word of mouth
Awareness: Close to **95%** of Cambodian consumers knew that organic and GAP products are **identifiable** by specific logos.

### Awareness about standards, certifications, etc in Cambodia

<table>
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<tr>
<th>Requirement</th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>GAP products are identifiable by specific logos</td>
<td>144</td>
<td>8</td>
</tr>
<tr>
<td>Organic products are identified by specific logos</td>
<td>145</td>
<td>7</td>
</tr>
<tr>
<td>There is a certification body in the country for organic products</td>
<td>136</td>
<td>16</td>
</tr>
<tr>
<td>There are local (national) standards for organic products</td>
<td>130</td>
<td>22</td>
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Clear Preference for organic and GAP products amongst Cambodian consumers, esp. the higher income group

- 46.71% of survey respondents chose organic products
- 18.42% chose GAP products
Lower price – A very important for buying (more) organic/GAP products

- 65.13%: Very important to have lower price
- 32.89%: Important to have lower price

Other important factors:
- More advertisement
- More information
- Wider selection
- Greater availability
- Greater visibility
Consumer trust: Who verify the product and provide information?

- 87.5% relied on specific sellers (stores/markets) to provide information
- 29.6% did their own research and gathered information by themselves

- 45.4% thought the Government should provide verification services
- 13.8% relied on independent certification bodies
- 11.8% relied on NGOs working with farmers
- 29.6% relied on the farmers
Other statistics

- 84.9% consumers have consumed both organic and GAP products in the past
- The most popular products include vegetables, fruits and rice
- Most consumers preferred to go to open air/street markets, then organic stores
- A majority quoted ‘supporting local farmers’ and ‘nutrition & health benefits’ as strong reason for consumption
- 86.84% would very likely continue to consume organic products and 76.97% for GAP products
- 52.63% however could not recognise relevant logos and marks
Conclusions & Recommendations
Overall, consumers in Cambodia indicated positive responses towards healthy/safe food products, but limited awareness/knowledge.

There is a clear need to raise consumers awareness on food safety issues.

Possible topics:
- The benefits of safe/healthy food products
- The harms that may be caused by unsafe/unhealthy food products
- The guarantee system for safe/healthy food products (standards and technical regulations, product labels, marks and logos, verification methods and agents)
- The possible and trustworthy source of information
Possible means and channels

- Seminars, workshops by local NGOs/consumer organisations
- Reader-friendly publications (leaflets and brochures) for consumers
- ‘Safe food’ campaigns
- Social media, website, blogs and wikis on organic and GAP products//brands
- Radio talkshows
- Television programmes
- Etc
In the longer run

- Adopt a Law on Consumer Protection
- Establish a Consumer Organisation
- Well-targeted incentives for organic/GAP producers
- Organic/GAP trade fairs for promotional purpose
- New tools, such as mobile apps, for checking the availability, prices and locations of organic/GAP products