Cambodian consumers’ knowledge and perception toward food quality and safety.

Fruit and Vegetable Sector

Som Chanchhorvy - Tom Duperret - Lucie Reynaud
06/12/2018
Content

1. Context of the survey
   1. F&V sector
2. Objectives of the survey
3. Methodology of the survey
   1. Time frame
   2. Overview of the situation
   3. Analysis
4. Results of consumers’ survey
5. General feedbacks and conclusions
6. The way forward, link with the food governance
Cambodian Context
• Low local F&V production according to the needs\(^1\).

• 50% of fresh fruits and vegetables consumed in Cambodia are imported\(^2\).

• Low safety and quality control\(^3\).

• Only CamGAP certification has a legal status by the government\(^4\).
Cambodian consumers’ knowledge and perception toward food quality and safety.

Fruit and Vegetable Sector

Objectives of the survey
Objectives:

Cambodian scale

Better understand knowledge, awareness and perception of Cambodian people toward F&V quality and safety.
Use those results within the GRET Marketing strategy in Siem Reap.

Greater Mekong Subregion scale

Complete others surveys conducted in Myanmar, Vietnam, Laos and Thailande about the same subject.
Get an overview of the consumption trends, needs and expectations in SouthEast Asia in F&V sector.
Conduct projects, actions at the GMS scale.
Cambodian consumers’ knowledge and perception toward food quality and safety.

*Fruit and Vegetable Sector*

Methodology of the survey
Time frame of the survey

November 2017 until April 2018

Literature review and methodology setting up

Datas collection
- Interviews
- Retranscription

Interviews and field work
- Semi directive interviews and focus group
- Consumers and Short supply chain actors

Analysis
- Thematical analysis
- Link with the literature

Results presentation
Implementation to the marketing strategy
Overview of the situation

➢ Household Survey:

➢ 30 interviews in Siem Reap and 2 focus group.
➢ Location: Domestic Market and « Vegetable and Fruit Show ».

➢ 30 interviews in Battambang and 1 focus group.
➢ Location: Domestic Market.

➢ 30 interviews in Phnom Penh.
➢ Location: Domestic Market and Shops.

➢ Short supply chain survey:

➢ 14 interviews in Siem Reap.
➢ Location: Hotels (4); Restaurants (9); Super Market (1) and Shops (1).

➢ 8 interviews in Phnom Penh:
➢ Location: Restaurants (4); Shops (4)
## Analysis

### Consumer survey

Households – Shops – Restaurants – Hotels – Super Market

<table>
<thead>
<tr>
<th>Theme</th>
<th>Behaviors</th>
<th>Knowledge</th>
<th>Expectation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Place/Supply</td>
<td>• Safety/Quality</td>
<td>• Quality/Safety</td>
</tr>
<tr>
<td></td>
<td>• Decisional Criteria</td>
<td>• Local/Imported</td>
<td>• Certification</td>
</tr>
<tr>
<td></td>
<td>• Practice/Strategy</td>
<td>• Information</td>
<td>• Information</td>
</tr>
<tr>
<td></td>
<td>• Constraints</td>
<td></td>
<td>• Improvement</td>
</tr>
</tbody>
</table>

- **Knowledge**
  - Safety/Quality
  - Local/Imported
  - Information

- **Expectation**
  - Quality/Safety
  - Certification
  - Information
  - Improvement
Cambodian consumers’ knowledge and perception toward food quality and safety.

*Fruit and Vegetable Sector*

**Results of the consumers’ survey**
Behaviors:

- Main place of purchase: Domestic market (81/90)

F&V purchase strategy

They can make the difference between imported and local products and 41/88 do not feel confident with the F&V they buy

Legend:

Others: smell, touch, taste, natural
Consumers would like to buy more local products, but sometimes they have no choice.

Food Safety Strategy:

- **Both**: 62/90
- **Price**: 24/90
- **Safety**: 4/90

“**I try to avoid imported products but I don’t have the choice because the local production cannot meet the demand. I try to buy only the products which cannot grow in Cambodia**”

Cambodian consumers on Domestic Market

“**We want to buy at a good price which is enough to support the farmer but not too expansive.**”

Focus Group Battambang

Local Production’s Constraints:

- **High prices**
- **Low availability/High seasonality/Low diversity/Quantity**

Focus Group Battambang
Knowledge and awareness:

- Food quality and safety are highly linked to the origin

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Safety</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Chemical free</td>
<td>✗</td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>✗</td>
<td></td>
</tr>
<tr>
<td>Fresh</td>
<td></td>
<td>✗</td>
</tr>
<tr>
<td>Taste</td>
<td></td>
<td>✗</td>
</tr>
<tr>
<td>Appearance</td>
<td></td>
<td>✗</td>
</tr>
</tbody>
</table>

- Food quality definition:
  “It represents the sum of all properties and assessable attributes of a food item. Usually this is done by the three accepted categories of quality: sensoric value, suitability value and health value.”
  According to Food quality definition and holistic view by C. Leitzmann:

- Food safety definition:
  “It refers to handling, preparing and storing food in a way to best reduce the risk individuals becoming sick from foodborne illnesses”
  According to the Australian Institute of Food Safety.
Households survey

LOCAL AND LINKS WITH CHEMICALS

“Local products are safe because they do not use chemicals in the production [...] sometimes they use chemicals if they have insects”
Cambodian consumers in Siem Reap.

“A lot of imported products are dangerous for people because we don’t know about the practices but anyway I am afraid about both local and imported products because I do not know”
Cambodian consumer in Battambang.

- **No chemicals**: 58/81
- **Less chemicals**: 18/81
- **Chemicals**: 5/81

Domestic market and shops’ clients

Only in domestic market

“Local means from Cambodia, less chemicals than imported, safe, better taste, better quality, bad look, small size and higher price according to Cambodian consumers.”

Focus group in Battambang.

“They make 3 categories of vegetable: organic which are very hard to grow because no chemicals and then safe which is like the GAP standard and it is easier because can use chemicals sometimes and then the last one is the normal products which use chemicals”
Focus group in Battambang.

- **Domestic market and shops’ clients**: 58/81
- **Only in domestic market**: 18/81
- **Local means from Cambodia**: 5/81
“I know that there is no control in Cambodia and I only trust when it is supported by government or NGO” Cambodian consumers at the Market show.

“It is better to buy label and tags because it is quality guarantee and without label then you cannot be sure” Cambodian consumer at the market show.

In Domestic market in SR and Shops’ clients

Mostly in Domestic market in Battambang

Mainly shops’ clients and Domestic market

Know and trust

Know and no trust

Do not know
“Sometimes some products have a hole inside so it means they used chemicals. I have never seen it but my friends told me”. Cambodian consumer in Domestic Market.

“I used to be a farmer and I works for the government and I know that farmers don’t know the right dose to apply and for some products (cucumber, corn, bean) I do not buy because I know it requires a lot of chemical to grow” Cambodian consumers in Domestic Market.

“I used to go to the domestic market but I got health problems so now I go to the shops” Cambodian consumers in Shop.

INFORMATION SOURCES:

- Own experience
- Relatives
- Social media (TV, FB)
Cambodian consumers’ knowledge and perception toward food quality and safety.

Fruit and Vegetable Sector

General feedbacks & Conclusion
1. **Cambodian Consumers have Knowledge and are aware Toward Food Quality and Safety.**

   It is increasing.

   “They are now aware even the middle or higher class, they start to aware and they start to buy even if it is small quantity because they don’t want their children to become sick.”

   AN Chankomar, Project Coordinator at Khmer Farmer Garden.

2. **Wish More Reliable Information in Different Forms To:**

   - Reduce knowledge disparities
   - Reduce suspicions
   - Right tool for Right choice

   “I trust Cambodian labels only if I see add on TV or it is supported by government, I will trust label if there is explanation from the producer.” - Cambodian Consumer in Siem Reap.

3. **F&V Wished on the Domestic Market**
Consumers are one main actor of the local food system. They can have a big impact on the whole chain with reliable information.

This information access is essential to enhance local food governance with:
- A new sustainable food system,
- Food security,
- A vision co-constructed with consumers and local food system actors’ participation.

GRET and CIRD act at two entries: **Between Civil society and Market**
**Between Local authorities and Market**
GRET initiatives to build trust and reinforce linkages between consumers and producers:

- Support establishment of **Weekly Farmers Market** in Siem Reap with local authorities and Agrisud
- Conduct **consumers survey** to take into account their needs and perception
- Support Agroecological farmers group to develop **own safe standard for vegetable production** without chemical pesticides and **PGS certification**
- Develop **collaboration with local media** to produce quality and regular content related to agriculture and food issues.