

FOOD SECURITY SNAPSHOTS

Horticulture Sector Cambodia



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Vegetables in Cambodia

Consumed, on average, six days a week, vegetables are a main part of the daily dietary intake among the Cambodian people. Yet, Cambodia's horticultural sector is **largely underdeveloped**. In 2013, production of vegetables was about 619,068 metric tons, meeting only 40–50% of the estimated domestic demand. To fill the gap, Cambodia has to **import roughly 114,000 tons** from neighboring countries especially Vietnam and Thailand.

Issues and Challenges in Vegetable Production

A myriad of constraints and challenges characterize the poor performance of the sector including poor access to improved technology and inputs, lack of postharvest infrastructure, limited information on postharvest management techniques, inadequate quality and safety standards and limited private investment in agriculture.

Cambodia's research and development capacity in the field of horticulture is very limited, resulting in little changes in technological innovation, particularly when it comes to improving seed quality. The sector highly depends on imported seeds from neighboring countries, some of which are of questionable quality. Despite legal provisions for **seed management** through the Law on Seeds Management and Plant Breeders' Rights enacted in 2008 to develop the seed industry, enforcement has been poor due to the absence of many underpinning regulations. It is apparent that the lack of clear regulations for trials, releases, production, distribution, and **import of seeds** is a major hurdle in the development of the seed industry.

The high prices of inputs, particularly **fertilizers**, also pose another constraint for vegetable producers. The prices of Urea and DAP fertilizers, for instance, have nearly doubled from 2006 to 2013.

Vegetable produce is highly perishable so proper postharvest management is also required. Unfortunately, Cambodia's **storage facilities** are lacking, and **information on handling and agro-processing**



Lack of inputs and limited information on postharvest management are some of the problems of Cambodia's horticulture sector.

is limited. The small-scale and unorganized nature of vegetable production systems also makes it difficult to build a **strong market link**. In the absence of organized groups of vegetable growers, it is difficult for smallholder farmers to access larger, more lucrative markets.

Last but not the least is the vegetable grower's limited capacity to effectively control **pests and diseases**. Since vegetables are more prone to pest and disease attacks than cereals, farmers oftentimes resort to applying high doses of pesticides. With the country's inadequate diagnostic capability for food safety testing, the risk of unsafe and contaminated vegetable products in the market is high. Furthermore, Cambodia's adoption of the **ASEAN Good Agricultural Practices (ASEAN GAP)** still remains at its early stage of development.

Responses and Strategies

Most recently, Cambodia, with technical assistance from the **Cambodia HARVEST Program** of the USAID, has formulated the **Agricultural Extension Policy**. This is a landmark policy to provide greater access to agricultural technology and information in order to boost productivity and commercialization.

AGRICULTURE SECTOR STATISTICS (2012)



NATIONAL STRATEGY

Rectangular Strategy (RS III) - Emphasizes improvements in agricultural productivity, diversification, and commercialization, and the promotion of the agriculture sector to serve as the dynamic driving force for economic growth and poverty reduction

National Strategic Development Plan (NSDP) 2014–2015
Agriculture Strategic Development Plan (ASDP) 2014–2018 - Promote improvements and adoption of better agricultural technology and inputs, particularly improved seeds

Unfortunately, a clear-cut policy direction with specific focus on horticultural crops development is absent. One attempt to put such a **policy framework** in place is an ongoing collaboration between the Ministry of Agriculture, Forestry and Fisheries and the Food and Agriculture Organization of the United Nations (FAO) in the conduct of a research on Cambodia's vegetable sector. It is envisaged that the diagnostic study will yield key insights that will be instrumental in the formulation of viable policy options for the development of the horticultural sector.

In the meantime, efforts to directly help vegetable growers in their farming practices continue. The Cambodia HARVEST Program is one of the major initiatives directed at promoting Cambodia's agriculture in general and the horticulture sector in particular. Its five-year integrated food security and climate change program has helped diversify and increase **food production and income** for up to **85,000 rural Cambodian households**. It has introduced solutions to address poor productivity, postharvest losses, malnutrition, and environmental degradation, among others to vulnerable rural populations.

Support to the commercial horticulture farmers has also paid big dividends. Horticultural yields have increased by **228%** with a corresponding income increase of **336%** over the baseline. Better **home gardens** are helping rural families tackle malnutrition and food insecurity, which are significant problems in Cambodia. With the increased yield, poor households now have **more access to food**. The program's promotion of crop diversification has also resulted into farmers planting a variety of crops, including rice, vegetables, and corn, on the same plot throughout the year.



The Cambodia HARVEST project is helping vegetable growers improve their farming practices and diversify their production.

Horticulture Sector

Cambodia's biggest challenges are to improve the income and nutrition of smallholder farm families and produce more vegetables to meet the growing demand. This could only be addressed if the various **constraints and challenges** are responded to in a vigorous manner.

Foremost is the need to enhance **horticultural R&D capacity** to bring about improvements in technology and inputs in the farming systems, particularly **seeds**. Part of R&D improvements is expanding knowledge and information on **production and postharvest management practices**. Cambodia should look into increasing **public spending** on quality horticultural R&D programs, keeping in mind that **research** on fruits and vegetables has the highest median rate of return of 67%, higher than any other crop.

Efforts must also be made to streamline the **business environment** so as to encourage participation from the **private sector** in developing commercial farms and the agro-processing industry. This should be regarded as an effective way of introducing **better technology, infrastructure, credit**, and other services into the systems.

Finally, initiatives to put in place **adequate policies and regulations and practices** that are necessary for the sector's development must be intensified. It will be important to incorporate key recommendations from the FAO diagnostic study on the country's vegetable sector. Critical policies and regulations pertaining to **seed industry development and quality and safety standards** should be crafted.

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