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## **The Prospective of Agriculture in Cambodia**

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Cambodian Farmers Association Federation of Agricultural Producers  
CFAP Cambodia

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## About CFAP

- **CFAP** is a national membership-led organization which small scale farmers' associations and cooperatives are members.
- CFAP works directly with producer group members.
- **We focus on:** Climate Smart Agriculture, Linking farmers access to markets and profits, Savings, Food security, Networking, Enterprising of farmers' produces for sustainability and strengthening of FOs/Coops.

## About CFAP (Cont'd)

- Total full members of **19 FOs/Coops**
- **In 5 provinces** (Kampong Speu, Kampong Thom, Kandal, Prey Veng and Svay Rieng.
- Total individual members of 34,640ps, out of which 18,012 female (52%). female.
- Network FAs/Coops in **6 provinces/municipalities** (Takeo, Kampot, Kampong Cham, Kampong Chhnang, Siem Reap and Phnom Penh,
- Our network represents **150,000HHs members in 11 provinces/municipalities.**

## About CFAP (Cont'd)

### Our Key Programs

- 1). Capacity Building
- 2). Agriculture and Rural Development
- 3). AGRI-Business
- 4). Savings and AGRI-Credit
- 5). Strengthening Farmers' Associations

## Overview of agriculture in Cambodia

- More than 80% of the Cambodian populations are farmers [live in rural areas](#) which contribute about **half of country's GDP**.
- Gross Domestic Product (GDP): **agriculture 33%** on average, while **industry about 38%** and **services 23%**.
- **Agriculture industry are 54% crop production, 26% fisheries, 14% livestock and 5% forestry and logging.**
- **Cambodia's main agricultural crop is rice** which grow on over 90% of the currently cropped area (MAFF 2014).

## Overview of agriculture in Cambodia (Cont'd)

### Rice Growing Model



## Overview of agriculture in Cambodia (Cont'd)

- Second most important crops are **rubber, maize, Cassava, soybeans, mungbean, pepper, and tobacco, etc.**
- Two main types of farming systems: **rice-based systems and multi-cropping systems.**
- Paddy 68% of the cultivated area, followed by **subsidiary and industrial crops 21%, rubber plantation 7%, and permanent crops 4% (MAFF 2014).**

## Overview of agriculture in Cambodia (Cont'd)

### The cultivated area in Cambodia in 2013

| Crops                           | Cultivated area (ha) | Remarks  |
|---------------------------------|----------------------|--|
| Rice crop                       | 3,052,420            | Wet & dry seasons, receding, floating  |
| Subsidiary and industrial crops | 941,028              | Maize, cassava, sweet potatoes, vegetables, all kinds of beans, sesame, sugar cane, tobacco etc. |
| Permanent crops                 | 183,048              | Cashew, banana, oil palm, coconut, mangoes, coffee, durian, pepper, orange, and other fruit etc. |
| Rubber plantation               | 328,771              |  |
| <b>Total</b>                    | <b>4,505,267</b>     |  |

Source: MAFF, 2014

## Fertilizer Consumption and Policy

- **Fertilizers market in Cambodia evolved** rapidly to serve the demands of Cambodian farmers.
- Free market, led by the private sector operating in a competitive manner with **prices set by market forces** (IFDC 2010).
- Net importer of fertilizer. Until now, there was limited fertilizer production plant in the country (**Touk Meas and Five Star Fertilizer**), and most supplies came from neighboring countries.

## Fertilizer Consumption and Policy (Cont'd)

- Recent years, higher fertilizer prices prevented farmers from applying fertilizer in sufficient quantities
- **About 79% of farmers report** the underuse of fertilizer, with financial considerations as the main reason (*Lim 2006*).
- **Most farmers use natural fertilizer** (manuals, tree leaves, disposal kitchen stuff etc), now also problems as animals rearing is decreased while increasing of machinery.
- **Most farmers lack of knowledge to use fertilizer technically, Missed uses and much belief on their neighbors rather than experts (MAFF 2013).**

## Fertilizer Consumption and Policy (Cont'd)

- **Consumption fertilizers (Tons)**

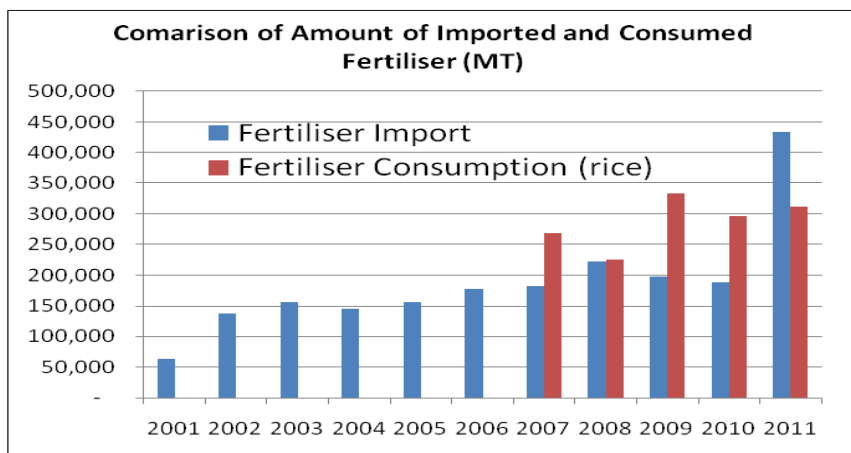
| Nitrogen Fertilizers<br>(t N) |        | Phosphate Fertilizers<br>(t P205) |        | Potash Fertilizers<br>(t K20) |       |
|-------------------------------|--------|-----------------------------------|--------|-------------------------------|-------|
| 2005                          | 2012   | 2005                              | 2012   | 2005                          | 2012  |
| 11,053                        | 43,905 | 17,380                            | 20,652 | 1,556                         | 3,489 |

Source: FAOSTAT 2015

- About **20 registered companies** importing fertilizer into Cambodia, **only six active** and have license from the government.

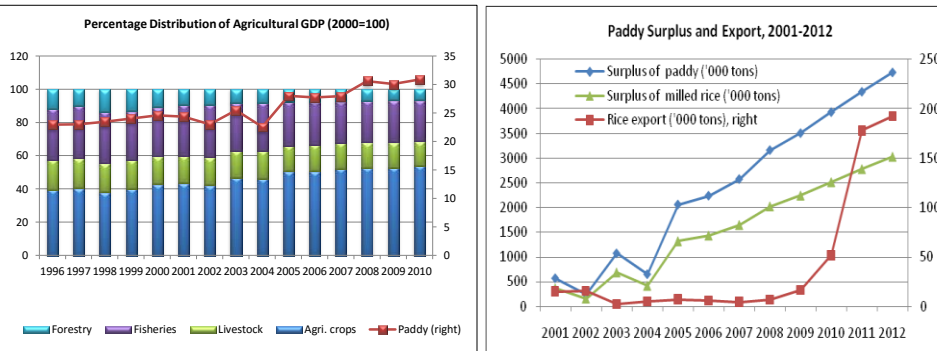
## Fertilizer Consumption and Policy (Cont'd)

### Trends in fertilizer use: import & consumption



Source: CDRI 2013

## Fertilizer Consumption and Policy (Cont'd)



- Agri. crops share increased to more than 50% of agri. GDP
- Paddy accounts for more than 50% of agri. crops value-added
- Paddy production increased 4-fold over last 20 years due to higher yield (4.2% per year) and rise in cultivated land area (2.6% per year)
- Milled rice export rose rapidly in last 3 years (CDRI 2013)

## Fertilizer Consumption and Policy (Cont'd)

### Quantity of Fertilizers Use by Crops (kg/ha, CSES)

| Types of Crop   | 2007  | 2008  | 2009  | 2010  | 2011  |
|-----------------|-------|-------|-------|-------|-------|
| Dry season rice | 232.9 | 245.9 | 181.4 | 229.2 | 183.7 |
| Wet season rice | 108.8 | 79.1  | 156.0 | 115.5 | 118.1 |
| Corn            | 138.7 | 132.2 | 75.5  | 107.4 | 133.8 |
| Cash crops      | 163.5 | 174.4 | 125.1 | 146.1 | 112.1 |
| Cassava         | 48.2  | 73.5  | 77.1  | 151.5 | 92.8  |
| Vegetables      | 330.2 | 212.0 | 247.9 | 277.5 | 192.8 |
| Other crops     | 222.4 | 107.7 | 192.4 | 187.6 | 145.6 |

Source: CDRI 2013

## Fertilizer Consumption and Policy (Cont'd)

### Estimate demand and supply of Inputs of fertilizer nutrients, NPK (ton)

| Crop      | Years         |               |               |               |               |               |
|-----------|---------------|---------------|---------------|---------------|---------------|---------------|
|           | 2013          | 2014          | 2015          | 2016          | 2017          | 2018          |
| Rice      | 610,484,000   | 611,101,400   | 611,600,000   | -             | -             | -             |
| Rubber    | 4,931,550,000 | 5,015,250,000 | 5,435,250,000 | 5,765,250,000 | 6,065,250,000 | 6,335,250,000 |
| Vegetable | 7,696,000     | 8,140,000     | 8,584,000     | 9,028,000     | 9,472,000     | 9,916,000     |

Source: ASDP 2014-2018



## Agriculture policy

### Farmer organizations

- At least **20%** of farmer members got access to services directly every year **from their FOs**
- At least **60%** of staff members at FOs become expertise/specialist in services extension/trainings to farmers **by 2018**.
- Improve vegetables production, rice production and animals production that could response to increased food demands on markets.
- Required knowledge/skills at FOs sub-national level and farmers must be reached of **60% by 2018**.

## Agriculture policy (Cont'd)

### Farmer organizations (cont's)

- **Continue giving advisory support and trainings** to FOs staff members and farmers as needed,
- **At least 50% of FOs** have developed clear **Strategic Business Plan**
- **At least 60% of FOs** have prepared **Business Plan by 2018**.
- **At least 50% of FOs as members** have capacity to produces and supply market regularly **by 2018**.
- **Policy to support FOs and Agriculture on farming and marketing.**
- **Need political will to support small scale farmers producers**

## Policy Recommendations

- Reform and simplify import licensing procedures and regulations
- Remove tonnage restrictions and allow importers to import unlimited amounts of suitable registered products based on market risk assessment
- Label imported products with sources of origin to identify sub-standard fertilisers
- Expand scientific research and public extension services to improve fertiliser use efficiency through increased public funding for agricultural research and development
- No protection policy to favors local fertilizer production plant (MAFF 2014)

**Thank you very much  
for your attention!**