

SEMINAR



Organisations in Value Chains and Quality Management

5th of October 2023 - Phnom Penh Hotel, Cambodia



Supported by:





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○ Concept note

○ I - Introduction

Through the SynerGi project "Strengthening and structuring development CSOs and their partners to take greater account of associative expertise", the members of Groupe initiatives (Gi) have affirmed their desire to share their experiences, highlight their skills and promote innovations. In particular, they wish to exchange and reflect on their practices, enrich them, share them and disseminate them in order to strengthen their alliance in the field of expertise and project engineering, and ultimately to better promote their values and approaches in the fight against inequalities, solidarity and development aid.

The aim of the *Traverses* series of publications is to draw critical lessons from the practices of Groupe initiatives member organisations in order to contribute to the strategic and methodological debate in the international solidarity sector. In this context, the six members of the Gi working in Cambodia (Agrisud International, APDRA, AVSF, GERES, GRET and IRAM) wish to organise jointly a seminar to capitalise on, question and debate their experiences and practices on the theme of **organisations in value chains and quality management** in the Cambodian context, within the framework of *Traverses* 53.

○ II - Context

Over the two decades before COVID-19 struck in 2020, Cambodia has experienced strong economic growth and became a lower-middle-income economy in 2015. This high economic growth has been driven by garment exports, agriculture, tourism, and, more recently, construction and real estate. It contributed to a significant reduction of the number of people living below the national poverty line (from 47.8% in 2007 to 9.5% in 2019). In 2019, the share of agriculture value-added to the total GDP was estimated at 22.1%, involving around 3 million people in this sector (equivalent to 32.3% of the total labour force), mainly smallholder producers. Despite the strengths of the Cambodian agriculture (large national water resources, various ecosystems, important human resource), the agricultural sector remains characterized by unsustainable practices (deforestation, weak control of agricultural inputs), still depends on exports of a few unprocessed commodities (e.g., rice, rubber) and lacks of output diversification and value addition.

With regards to food security and safety, Cambodia has improved considerably in recent years. However, Cambodia remains behind other neighbouring countries in terms of quality, food safety and nutrition. Malnutrition remains prevalent among the poorest and most vulnerable groups, and the country is facing a lack of policy and technical standards on food safety control and management, inadequate coordination of concerned government agencies, and poor enforcement of food safety regulations.



In this context, Gi organisations have been working for several years, and in some cases for decades, to integrate **family farmers and craftsmen into local, national and international supply chains and markets, in order to improve their share of the value-added** and help improve their incomes and livelihoods, maintain jobs in rural areas, and thus ultimately fight against poverty and food and nutrition insecurity. Agrisud International, APDRA, AVSF, GRET and IRAM work in agricultural value chains, while GERES works in energy value chains.

The integration of family producers and craftsmen into value chains and their access to profitable markets allow them to **promote the sustainable practices** they are putting in place with the support of Gi members, in particular agro-ecological practices, sustainable forest management and energy-efficient equipment. These practices address the increasingly **important issues of sustainability in agricultural production systems** in a context of soil degradation and erosion, loss of biodiversity, pressure on water resources and climate change. They also address the **sustainability of energy systems** in a context where biomass (charcoal and firewood) accounts for more than 60% of primary energy supply in Cambodia, and therefore remains a major factor in degradation and deforestation (5% annual deforestation between 2010 and 2014).

It is often **difficult for smallholder producers and craftsmen to connect with markets**, in a context in which they are facing a deficit and asymmetry of information compared with intermediate players in the chain, in which consumers' and politicians' expectations are growing and accompanied by more demanding quality standards and specifications, and in which international competition and competition from large-scale producers is strong.

In addition, the fact that they are fragmented and poorly organised, their limited capacities to invest in and finance their production factors, and their need for technical, organisational and commercial capacity building, mean that they are **unable to fully adapt or respond to market demand**. Moreover, their upstream position in the supply chain puts them in a relatively weak bargaining position, which do not allow them to highlight the **quality and specific feature of their products and practices**, and therefore do not prevent them from benefiting sufficiently from remunerative prices and from the value-added created throughout the supply chain. Finally, their difficulties in communicating and lobbying do **not allow them to advocate for a better institutional, legal, tax, and commercial environment**.

Gi members are working or have worked with producers and craftsmen in various regions and value chains facing these market access challenges:

- Local market in the Siem Reap region: vegetable, spices, rice (Agrisud, GRET), horticulture (Agrisud), poultry (GRET), fish (APDRA)
- International market in the Preah Vihear region: rice (AVSF and IRAM);
- National market in the Phnom Penh and Khampong Chhnang region: sustainable coal and improved cook stoves (GERES).

Different approaches, practices and tools have been implemented by Gi members, who have developed them over the course of their work, to meet the challenges of **improving production and supply, collective organisation** of producers and craftsmen, **structuring and cooperation within the value chains**, supporting for local **processing, management of product quality, promotion of quality** and the specific features of production, and **raising awareness** among downstream and institutional players.



Teams from Gi member organisations have already been able to share their practices and experiences through field visits and meetings. This seminar on their experiences dealing with “organisations in value chains and quality management” is in the continuity of their exchanges, and aims to formalise and capitalise on their analyses, highlight their achievements and debate the development processes involved in their work.

○ **III - Issues and questions**

The theme of “organisations in value chains and quality management” requires first of all to clarify the various underlying concepts that will be used during the capitalisation exercise.

Value chain: succession of production, processing and transport operations necessary for the supply of a product to the final consumer. These operations are carried out by several actors with economic and commercial relations, and with their own strategies.

Organisation: a set of individuals grouped together in a regulated structure with a communication system to facilitate the flow of information in order to meet specific needs and objectives.

Quality: characteristics, attributes and value of a product or service determined by users or consumers to meet their needs and expectations. Quality is therefore a relative concept based on needs and it is multidimensional. Quality can include various components such as safety, health (nutrition), organoleptic aspects, functionality (practicality, distribution, etc.), social and environmental aspects.

Quality management: a set of standards, rules and processes that are put in place and implemented to help achieve the expected characteristics of a product or service, and to measure and control its quality.

On this basis, the members of the Gi identified the following issues and questions concerning the “organisations in supply chains and quality management”:

Defining quality and differentiating products:

- Who determines quality: consumers, intermediaries, public authorities, third-party certification bodies or producers? How can demand for a given product be influenced/constructed?
- How is quality characterised? How do producers improve their knowledge of expected quality? What tools are used (norms, standards, labels, etc.; internal, external)? Who are the players involved and what relationships do they have?
- Does targeting a given quality/market mean specialising or diversifying?
- How do producers understand the issues of quality, quantity and regularity? What does it mean in terms of raising producers' awareness?
- To what extent are production systems adapted/transformed by the quality objective (new productions, new practices, etc.)?
- What other factors encourage the adoption of these practices? Reduction in production costs, remunerative prices, incomes, etc.



Issues relating to the type of organisations in the supply chains:

- What are the different types of stakeholders involved in these supply chains?
- How have the supply chains been organised: which organisations (groups, cooperatives, inter-professional organisations, etc.)? What are their responsibilities (setting standards, monitoring, marketing, etc.)? What are the relationships between the players? To what extent is the objective of achieving a certain quality and/or the introduction of a quality mark, a unifying, structuring and/or compulsory element?
- What were the processes and stages involved in setting up these organisations? What legitimacy and power of influence do they have? How are they governed?
- What is the role and involvement of public stakeholders (decentralised government departments responsible for agriculture, trade, etc.)?
- How do you deal with the issue of inclusion in and exclusion from a quality organisation and/or standard? How can we determine which producers meet the quality requirements, and on what criteria can they join an organisation/access a market?
- How do competitors react to the introduction of structures and organisations to manage quality and connect with markets?

Quality management issues:

- How are the capacities of stakeholders strengthened to adopt/follow these standards: production techniques, organisation, marketing, management, etc.?
- Are there thresholds/scales to ensure the profitability of production that meets a given quality and maintains services: quantity of production, diversity, etc.?
- How are the various costs of the internal control system (human resources, equipment, training, etc.) and external control system (certification) taken into account? What are the financial models involved (project funding, transfers or direct payment by stakeholders with support, etc.) and how have they evolved over time as organisations have matured?

Positioning issues for Gi members and other rural development agencies/operators:

- What role did Gi members play throughout the process? Commercial stakeholders in the value chains, directly responsible for certain functions (management, business development) on behalf of the organisation, consultant/technical support, etc.
- What role did the projects and members of the Gi play in shaping demand?
- What transfer and ownership processes have been put in place by local players in quality management?
- What have been the role and positioning of other rural development agencies and operators throughout the process?



○ **IV. Seminar's programme**

SESSION 1 - Targeting quality: challenges and rationale between answering and building demand

This session will focus on the interests and rationale for the producers to meet specific quality requirements, and the extent they play a role in defining and building quality. It will also deal with the different strategies and practices that the producers have set and are continuously experiencing to meet quality requirements. The panellists will highlight the extent producers have improved their knowledge of the expected quality and have strengthened their capacities to adapt their practices and change their production systems and organisation. It will explore to what extent sustainable practices can be promoted thanks to the access of some markets. Finally, factors and constraints to set quality-oriented practices will be discussed.

Panellists and case studies from GERES, GRET and APDRA

SESSION 2 - Setting up organisations to integrate value chains and manage quality

This session will focus on the value added of setting producer organisations to integrate value chains and to be able to manage quality in order to both answer and build the demand. It will also deal with the challenges and underlying conditions to set up, legitimate and sustain producer organisations. The panellists will highlight the extent targeting quality has been a driver to unify producers into organisations, and on the other side how setting up organisations is crucial to reach the volumes and diversify productions, as well as to control the quality, in order to reach markets and their requested qualities. Finally, factors and constraints to make efficient and sustainable organisation will be discussed.

Panellists and case studies from AVSF-IRAM and Agrisud

SESSION 3 - Roundtable - positioning of rural development agencies/operators throughout the development process

This session will focus on the role played by the Gi members throughout the process of strengthening producers' capacities to answer quality and to manage organisations. It will emphasise on the positioning of the Gi members within the supply chain and its evolution according to the strengthening and maturity of the supported organisation. The panellists will highlight the extent transferring knowledge and capacities from Gi members to local producer organisations is a progressive process and a key factor of success and sustainability. Gi members' experience will allow to broadly question the positioning of rural development agencies and operators, at the crossroads of public and private supports.

Panellists from IRAM and representants of producer organisations, public institution, private sector and donor



○ Agenda

8:00 - 8:30	Welcome of participants	
8:30 - 8:45	Opening remarks and introduction	<i>Paul Belchi</i>
<p>8:45 - 10:15</p> <p>Session 1- Targeting quality: challenges and rationale between answering and building demand - Moderator: <i>Paul Belchi</i></p>		
8:45 - 9:45	<p>Case study: GERES/ SEFED project</p> <p>Support the Emergence of Sustainable Supply Chains in the domestic energy sector</p>	<p><i>Patrick Renaud</i></p> <p><i>Producer (tbc)</i></p>
	<p>Case study: GRET / APICI project</p> <p>Participatory Guaranty System for local safe vegetables certification</p>	<p><i>Sokharith Touch</i></p> <p><i>Thai Soda</i></p>
	<p>Case study: APDRA / DÉFIP project</p> <p>Developing small-scale aquaculture systems in a complex environment to match local demand</p>	<p><i>Dorian Dejace</i></p> <p><i>Soeun Chhay</i></p>
9:45 - 10:15	Q&A with the audience 	
10:15 - 10:45	Coffee break 	



10:45 - 12:00

Session 2 - Setting up organisations to integrate value chains and manage quality

Moderator: Paul Belchi

10:45 - 11:30

Case study: AVSF-IRAM / SCCRP project
Development of an Organic rice value chain with Preah Vihear Mean Chey Union of Agricultural Cooperative

*Savoern Meang
Vaeng Neang*

Case study: Agrisud / IADA project
Supporting the agroecological transition in peri-urban family farming through offering services

*Picheth Seng
Champa Chhong*

11:30 - 12:00

Q&A with the audience



12:00 - 13:30

Lunch break



13:30 - 15:15

Session 3 - Roundtable - Positioning of rural development agencies/operators throughout the development process - Moderator: Paul Belchi

13:30 - 14:30

- Gi member: *Jean-Marie Brun (ARTE-FACT / IRAM)*
- Producer organisation: *Oeur Sam Ath (PMUAC)*
- Producer organisation: *Tann Dinary (Green Farmers)*
- Public institutions: *Kimly Phoeun (Department of Commerce Siem Reap)*
- Private sector: *Nhim Thangchen (AMRU Rice)*
- Donor: *Emmanuel Dollfus (AFD)*

14:30 - 15:15

Q&A with the audience



15:15 - 15:45

Coffee break



15:45 - 16:15

Wrap-up

Paul Belchi

16:15 - 16:30

Closing remarks

Paul Belchi

○ Panellists



Patrick RENAUD: Patrick Renaud is the country representative for GERES in Cambodia, specializing in energy access and efficiency. He is also responsible for two projects with the garment sector, promoting CO2 emissions reduction and social dialogue promotion with the support of the French Development Agency and the European Union. He has worked for 13 years in Southeast Asia and Sahel on both sustainable development and emergency response issues.



SNGUON Chamroeun is coordinator of CESPAC, where he serves as the primary contact for CESPAC's President and partners, Chamroeun also oversees crucial financial tasks and manages day-to-day operations. With three years of experience, Chamroeun's leadership has been instrumental in collaborating with a dynamic team of professionals, including 30 stove producers, to advance CESPAC's mission. His commitment and meticulous approach ensure CESPAC continues to excel.



Sokharith TOUCH: Project Manager from GRET-APICI project, he has been working in project since 2010. The developing sustainable agriculture for smallholder farmers in Siem Reap started in April 2010 until now. Overall objective is to improve the livelihood of smallholders' farmers by developing sustainable agriculture based on low agricultural inputs usage and diversification of the production. The project funded by Hauts-de-Seine Department in France, through collaboration of implementing project activities with CIRAD in 54 villages, 7 commune, 2 districts.



Thai SODA: Ms. Thai Soda, deputy Ecofarm Agriculture Cooperative. She is living in Chrey Khang Cheung village, Kien Sangkae commune. She has been working with project since 2014 As vegetable producers then become vegetable buyers, in the areas and later on in 2019 she become deputy director of Ecofarm Agriculture Cooperative. She is charge of marketing (buying from AC members, cleaning, classifying and packaging products then supplying to buyers in Siem Reap and Phnom Penh.



Dorian DEJACE born in 1994, is a Belgian agronomist. Before working in the aquaculture field, he had an experience with farmers' organisations on agroforestry and soil fertility in countries such as Senegal, DRC, or India. He has been in Cambodia since 2021, where he manages DéFiP project (Development of fish value chains), within the French NGO APDRA. He currently leads a small team made of 4 field facilitators and 1 action-research officer, all hired by the partner Cambodian NGO TCO.



Soeun CHHAY: born in 1970, is a farmer from Thmey village, Kchas commune, Sotr Nikom district, Siem Reap province. He is involved in various agricultural activities, including rice farming and cows' raising. He has been involved in fish culture since 2015 and joined DéFiP project (Development of fish value chains) in 2020. He has grown various species, including pangasius, silver barb, tilapia and climbing perch. He plays a key role in his community, whether it be by transferring innovations or connecting farmers to the market.



Savoeurn MEANG: has worked for AVSF since 2010 and had more than 15 years of professional experiences in the fields of agriculture development, rural community development and project implementation & supervision, including Farmer Organizations' support and institutional development. With the AFD-funded SCCRP project, he was responsible for the engagement of Cooperatives in paddy commercialization and in contract farming with millers and exporters, and in supporting numerous cooperatives engagement in value chain and in certified quality labels.



Vaeng NEANG: aged 56, he resides in Mlu Prey village, Mlu Prey Muoy commune, Chhaeb district, Preah Vihear province. He married Srey Phal and has fathered 4 children. He has, since 2015, started to produce organic rice and sell via the facilitation of his AC, with total land size of 7 ha. In the first year, his paddy was rejected by the contracted buyers due to high broken rate. Thanks to technical support by SCCRP project, his rice quality has been improved and met to the quality criteria. Under the facilitation of his cooperative and PMUAC, the market of organic rice is guaranteed before farming and higher & secured prices are offered. In particular, organic rice farming is not impacted to his family health and environment.



Picheth SENG: Picheth, is an Agro-development engineer, with more than 25 years of experience with governments, private sector, non-governmental organizations and international organizations. He worked in the Comoros in agroforestry, and in Cambodia for about 20 years where he is currently Agrisud International representative in Cambodia and project coordinator. The actions of these projects target small family farms and relate to agro-ecological intensification, diversification and marketing of production as well as sustainable management of natural resources.



Champa CHHONG is a farmer, like all her family. She is 27 years old and is the youngest of her 2 sisters. she is married and has two young children. The family lives on the immediate outskirts of the city of Siem Reap where they do vegetable production in an agroecological way, techniques that combine productivity and low pressure on the environment. She joined the GF association in 2018 as a member and is currently a collector for the association.



Jean-Marie BRUN is an agro-economist specialised in agricultural value chains, producer organisations and quality labels. He has worked in South-East Asia and Cambodia, where he has lived for 25 years. Founder of ARTE-FACT Development & Agri-Food Consulting, he is a regular partner of IRAM, with whom he provided technical assistance to the “Support to Cambodian Rice Commercialisation Project (SCCRP)”. He has also worked regularly with AVSF and GRET, notably in Cambodia, Laos and Myanmar on Protected Geographical Indications.



OEUR Sam Ath has more than 10 years of professional experience in the fields of agribusiness and agricultural cooperative management. At PMUAC, he has acquired new knowledge and skills in organic standards, internal control systems, and agricultural cooperatives. With high commitment and good performance, he was promoted to be Executive Director of PMUAC in 2017. There, he has gained knowledge and experience in agribusiness, management, and institutional development through his tasks and responsibilities as Executive Director. He is one of the key staff members who has contributed to the on-going growth of PMUAC.



TANN Dinary is a former graduated student from the National University of Battambang on food processing and women's entrepreneurship. She was born in Chi Kreng district, Siem Reap province in 1994, which is the same province that she works now with AGgrisud She has experience in products development with ago-processing such as drinks, essential oil, spices, and tea. Currently, she is in charge on GREEN FARMERS association business which focuses on production planning, technical coordination on supply and marketing to improve trade of association.



Kimly PHOEUN is the director of Commerce of Siem Reap provincial department. He serves nearly 16 years as the government official. He studied bachelor in marketing in Phnom Penh and graduated a master degree in general management at Royal University of Law and Economics-RULE. He works with various partner especially private sectors such as Siem Reap-Odo Meanchey Chamber of Commerce, Young Entrepreneurs Association and Woman Entrepreneurs Association branch of Siem Reap. He was used to work with GIZ in Green Belt Project and currently coordinating the AIM project (Accelerating Inclusive Markets for Smallholders). He is also work with Agrisud and Gret over several years for various activities which include vegetable exhibition, weekly market, vegetable safety and fertilizer project.



NHIM Thangcheng has working for Amru Rice since 2015 and had more than 12 years of professional experiences in the fields of agriculture development, supply chance management and product quality management standard. Manage contract-based supply with smallholder farmers for brings sustainability in the value-chain. The engagement with Agricultural Cooperatives institutionalizes a quality inspection system and strengthen the cooperatives' management of the supply chain and be replicated for the entire supply chain.



Emmanuel DOLLFUS is deputy director of AFD country's office in Phnom Penh, Cambodia, since August 2021. Mr Dollfus graduated in 2001 in law studies (Master) both in France and Australia. Mr Dollfus first worked for the French Prime Minsiter's office and the French NGO Solidarité Sida. He integrated AFD in 2011 as deputy head of communications and then as a project manager in rural development and biodiversity.



○ Groupe initiatives and its members in Cambodia



○ Groupe initiatives

Founded in 1993, Groupe *initiatives* (Gi) is a group of professional associations working in the field of international solidarity, who put their skills at the service of stakeholders committed to sustainable and fair development. Together, they test and validate effective and innovative approaches in the field, and share their practices. It currently has 15 member organisations.

The Gi members work in eight main areas of intervention: i) agriculture, agroecology and rural development, ii) climate and renewable energy, iii) water, sanitation and waste, iv) civil rights, gender and youth, v) microfinance and entrepreneurship, vi) cities and urban development, vii) education, training and professional integration, viii) health, nutrition and social welfare.

Groupe *initiatives* in figures:



67 cooperation countries



136 M€ of cumulative business per year



+2000 professionals



50 publications of capitalisation documents (*Traverses*)



913 projects and assignments a year, including over 60 collaboration among Gi's members

The members of Gi operating in Cambodia are Agrisud International, APDRA, AVSF, GERES, GRET and IRAM.



○ Agrisud

Agrisud has been working for 30 years alongside vulnerable populations in the countries of the South. Together with its partners, Agrisud develops projects to promote small agricultural enterprises that ensure the food and nutritional security of populations, create local wealth and preserve natural resources. Its strategy: to promote Very Small family farming Enterprises (VSEs) and the agro-ecological transition of territories.



Agrisud International has been working in Cambodia since 1995 in the agricultural and rural development sector. From 2016, the ongoing IADA project focuses on agro-ecological intensification, diversification and the marketing of production of small family farms in the Siem Reap province, which hosts majority of Cambodia's tourism, in order to ease the encounter with the markets from which they were too often excluded.

○ APDRA

Born in 1996, APDRA Pisciculture Paysanne supports fish farming in southern countries and raises awareness among northern stakeholders of the challenges linked to this activity. The association aims to promote and develop a sustainable smallholder fish farming. APDRA is committed to: i) increase and diversify the sources of income of family farms, ii) strengthen food security, iii) support professional organizations representing the interests of fish farmers, iv) defend and recognize small-scale fish farming .



In Cambodia, APDRA started its activities in 2020 within the framework of the program Development of Fish Value Chains (DéFiP), funded by the Agence Française de Développement (AFD). DéFiP aims at improving food and nutritional security and diversifying the livelihoods of rural populations through the development of family agro-ecological fish farming dedicated to local markets. After a first phase (2020-2022), the project is now at its second phase (2022-2025). It has been working with 140 farmers.

○ AVSF

Agronomes et Vétérinaires Sans Frontières (AVSF) works for international solidarity and has been engaged in supporting smallholder farmers since 1977. AVSF supports them as they strive to improve their standard of living, sustainably manage the natural resources upon which they depend, and contribute to the socio-economic development of their local area.



AVSF began working in Cambodia in 1991, providing technical support in livestock farming to the Royal University of Agriculture in Chamkar Dong, and initiatively training village animal health workers. AVSF has, since 1998, diversified its work by focusing not only on animal husbandry, but also on food security program to tackle food shortages of the rural farmers. As from 2008 until today, AVSF has taken greater considerations into not only supporting insecure farming households but also connecting those smallholders considered to be food-secure with value chain actors and markets so as to sustain their livelihoods and quality of life..

○ GERES

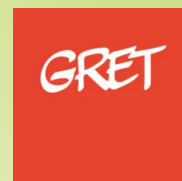
Set up in 1976, Geres is a development NGO working in Europe, Africa and Asia to improve living conditions and fighting against climate change and its impacts. As we operate in the field, the energy transition is a major lever in our activities. Our operations include work on developing value chains as these create jobs and are often key to the sustainability of the solutions deployed.



Present in Cambodia since 1994, Geres started its work focusing on the dissemination of improved cookstoves. As the first NGO world-wide able to enter to the carbon finance market with a stove project, by 2014 Geres had distributed more than 3 million improved stoves in the country. Today the goal of Geres in Cambodia is to contribute to the development of a sustainable, legal and traceable wood-fuels value chain and promote cleaner production processes in particular in the garment sector through 2 flagship projects: SWITCH-Garment (EU funded) and VETHIC (AFD).

○ GRET

Since 1976, GRET and its teams implement solutions and partnerships in 28 countries that are best suited to local contexts to improve the living conditions of the most vulnerable populations while preserving our planet. GRET's teams design and implement projects in the field and share their know-how and expertise. They engage in partnerships and facilitate networks at local, national and international level.



GRET in Cambodia is involved in five thematics: i) Food systems (APICI, ASSET, GI projects), ii) Land Governance (MRLG project), iii) Natural Resource Management (WAT4CAM project), iv) Nutrition and Health, Social Protection and Innovations for Informal Sector (SPIN - NSSF project), v) Local essential Services, Water and Sanitation.

○ IRAM

As an association offering consulting services for international cooperation since 1957, the Institute for research and application of development methods (IRAM) pursues activities that promote a less unequal society with sustainable development by combining expertise and a commitment to professional and ethical rigour.



Since 1999, IRAM provides long-term expertise and various kinds of short-term support in Cambodia. Recent interventions by the institute include support for agricultural value chains, producer organisations, Geographical Indication setting-up, Fair Trade certification for agricultural products (tea, pepper, rice), micro-finance network establishment, among others. IRAM is represented in Cambodia by Jean-Marie Brun through its firm ARTE-FACT.



○ Partners of Gi members in Cambodia

○ PMUAC

Preah Vihear Mean Chey Union of Agricultural Cooperative (PMUAC), as the first Union of Cooperatives registered in Cambodia, was created by the initiatives of 8 founding Agricultural Cooperatives (AC) in April 2016 under AFD-funded SCCRP project, supervised by SNEC in cooperation with MAFF, and implemented by IRAM and a consortium of AVSF-CIRD-ADG. The vision of the Union is that "farmers in Preah Vihear will be living with prosperous and dignity". PMUAC was officially recognized by GDA on 19th July 2016 with its office address in Krong Preah Vihear. As of 2023, PMUAC has 25 AC members (equal to 5,403 farmer households) in Preah Vihear province. To support its members, PMUAC plays a crucial role in Internal Control System management, certification, technical capacities for organic agricultural products, market linkage facilitation, etc. Hence, around 10,000 metric tons of certified paddy produced by more than 3,000 producers have been annually supplied to contracted buyers.



○ Green Farmers

The Green Farmers Association has over 400 members. It houses the activities of collecting, transforming and distributing local agricultural products, as well as marketing, labeling, promotion (fair ...), advocacy / lobbying, research for new markets. Its purpose is to improve the living conditions of farmers through products with higher added value; it is also to promote environmentally friendly production methods. The Green Farmers Siem Reap Association, is registered at the Ministry of Interior on 28th December, 2018. As of today, the Green Farmers Siem Reap Association has 403 members (273 females), coming from 29 villages, 6 communes in 4 districts. Green Farmers aims to build its organizational capacity to continue buyout the fresh and processed healthy agro products to its members and offering the fresh and processed agro products to other direct users and stakeholders in Cambodia's agricultural sector.



○ AMRU Rice

AMRU Rice (Cambodia) Co., Ltd started rice trading activities in 2009 followed by gradual vertical integration since 2011 by the establishment of its own semi-processing facilities, working its way upstream into contract farming with farmer cooperatives in specific provinces. The 3 rice milling plants of Amru Rice have capacity to produce 80,000 tons on output milled rice per annum and 1,000 tons on output of rice paper and rice noodle in 2016. Amru Rice is a major rice exporter in Cambodia, continuously present in the "top 5" for volume exported from 2013 up to now (2016), with volumes exported annually roughly in the range of 40,000 to 60,000 metric tons. Amru Rice facilitates partnerships poor farmer producers. This harnesses the producers' assets, labor, own-investment and expertise while making efficient use of public-sector services (infrastructure, enabling environment, state funds and seed capital)..



○ **CESPA**

Cambodian Efficient Stove Promoters Association (CESPA) is an association created in 2017 dedicated to promoting its members and Improved Cook Stoves in Cambodia. CESPA is involved in quality control, ensuring that the ICS meet the required standards for quality. The organization also work on market development initiatives to create awareness about the benefits of ICS among consumers and promote the adoption of these stoves. They provide a platform for stove producers who want to collectively promote their products.



○ **ECOFARM**

ECOFARM is an Agricultural Cooperative named "Sovathapheap Thoamacheat Agricultural Cooperative" registered in 2019. The main objective of Ecofarm Agriculture Cooperative is to support its members for a sustainable incomes growth and community development through some specific objectives such as linking farmers with a fair market opportunity, facilitating the access of farmers to good quality agricultural inputs, among others. Currently, Ecofarm AC has 125 members, including 93 women. 71 members are part of the PGS and are producing safe vegetables supported by the GRET through the APICI project.



○ **TCO**

Trailblazer Cambodia Organization is a Cambodian association based in Siem Reap, which has been working since 2008 to promote rural development, combat pesticides and optimise the stocking of community ponds. TCO has a good knowledge of the local rural fabric and Cambodian realities, whether technical, socio-cultural or economic. TCO also has many years' experience of working with technical services, particularly the Fisheries Administration. TCO is also a member of the Gender and Development Network (GADNet) and integrates gender issues into all its programmes and activities. The collaboration with APDRA was initiated in 2016 and came to fruition in 2020 as part of the DéFiP programme.



○ **Department of Commerce of Siem Reap**

The DoC is the deconcentrated office of the Ministry of Commerce in Siem Reap. It is responsible for regulating and promoting commerce and trade in the province.



○ **AFD**

AFD has been operating in Cambodia since 1993 and supports the country's development projects with the shared aim of achieving impact and sustainability for the benefit of populations. The investment programs financed by AFD have been designed and implemented in the framework of co-operation with a wide range of partners to improve access to basic services, strengthen water resource management, help adapt to climate change, build human capital and develop sustainable agriculture. More than half of the projects are co-financed with other donors. AFD also works with several research institutes and numerous associations. For 30 years, AFD's teams have been mobilized to support Cambodia's development trajectory and work together every day for a shared world.





○ General information on the case study (SEFED project)

Further to 13 years of GERES' support to production and distribution of efficient cookstoves in Cambodia, the SEFED was designed to support the emergence and empowerment of local actors involved in the production and distribution of improved cook stoves and sustainable biomass fuels in Cambodia using a threefold approach: i) increase the internal resources and capacities of these local actors, ii) stimulate market demand, iii) change the regulatory framework to support the dissemination of sustainable energy solutions and sustain the biomass energy sector for domestic cooking. It was implemented from 2016 to 2019 with the main support of AFD.

SEFED was aiming at consolidating the improved cook stove local production and supply chain and ensuring the maintenance of stoves quality and market recognition through a support to a local organisation (ICoProDAC, which then became CESPA) in gathering stove producers and distributors, and in supporting a strategy of setting up a quality seal to ensure valuation of improved stoves quality on the market..

○ Presentation of the value chain and the supported organisation (CESPA)

The main actors of the Improved cook stoves value chain are the stove producers, the stove distributors, CESPA and the technical partners. Historically based in the area of Kampong Chhnang, stove producers are primarily composed of small and locally-operated enterprises often manufacturing of various types of stoves. The production process involve: sourcing quality materials such as clay, skilled craftsmanship, and adhering to quality standards. The main type of Improved Cook Stove (ICS) produced in Cambodia were the NLS (New Lao Stove -1999) then the NKS (Neang Kongrey Stove- 2004) followed by multiple new model : "Naga", "Kampot", "Phnom dey Meas".

Producers are not often involved in the distribution process; they rely on established distributors who connect the stove made by the producers to the consumer markets in Kampong Chnang but also to Other Provinces and Phnom Penh.

CESPA is an association dedicated to promoting its members and ICS in Cambodia. CESPA is involved in quality control, ensuring that the ICS meet the required standards for quality (including safety and efficiency). The organization also work on market development initiatives to create awareness about the benefits of ICS among consumers and promote the adoption of these stoves. They provide a platform for stove producers who want to collectively promote their products. Created in 2004, this organisation has been registered as interprofessional association in 2017, and has 25 members in 2023.

Technical partners like GERES and then SNV provide technical and financial support to the sector. Geres supported the ICS from 1999 to 2019 before phasing out and handing over to SNV, who is still currently active in the sector and even supported the production of new types of clean cooking stoves. Geres and SNV expertise covers stove design, manufacturing processes, environmental sustainability, value chain strengthening to create a reliable market.



○ Characterisation of the required quality

On the demand side criteria that define quality quite “practical” as most consumers revealed to expect:

- Durability vs cost: probably the most important factor and primary driver of the buyer
- Fuel efficient stoves: consuming less fuel, to reduces expenses and time used to procure fuel
- Reduced smoke emissions compare to their previous stove
- Cooking Speed: especially important for large/busy households
- Ease of use and safety
- Modern or improved design including size and choice of materials use

Still on the demand side, consumers, including households and restaurants, are pivotal in setting quality standard. Also some distributors possess essential knowledge about the specific qualities required based on consumer profiles and geographical locations.

Quality is achieved when the stove satisfies the minimum criteria that involve adequate clay mixture preparation, stove body moulding, stove body trimming, grate manufacturing, drying process and firing process.

○ Main stakes producers are facing

On the supply side a variation in stove quality in observed due to several factors listed below and highlighting the importance of Quality Control:

- Turnover of Skilled Workers: as a result workers are often placed directly in the production line without adequate training.
- Inconsistency of Raw Materials: particularly clay, with the same specifications consistently. This necessitates adjustments to the molds to meet quality standards.
- Increasing Demand: when producers face high demand for stoves, some may compromise on quality in order to meet the quantity ordered.
- Worn-Out Molds & Templates: some producers may not realize the need for replacements or adjustments.



Cook stove workshop

Case study #2 Participatory Guaranty System for local safe vegetables certification

GRET



○ General information on the case study (APICI project)

Since 2010, GRET, in collaboration with CIRAD, has been implementing APICI (Semi-intensive Agriculture for smallholders' farmers using less inputs) project, in order to develop a sustainable agriculture for smallholder farmers and improve their livelihood, in Siem Reap province. This project is implemented as part of the partnership between the French Hauts-de-Seine department and Siem Reap Province. The overall objective of the program is to improve and secure the livelihoods of up to 2400 farmers through the development of a more efficient production and marketing system for agricultural products by supporting agroecology, market access and structuring professional farmers' organizations.

To achieve this objective, the programme proposes to train smallholder farmers to increase and diversify their productions while respecting the environment and the health of producers and consumers, thanks to agroecological practices. The programme also intends to contribute to the improvement of food supply chains by facilitating the rural and urban households' access to diversified and quality products at affordable price, through the support to farmers in implementing quality standards and low-cost certification processes such as Participatory Guarantee System (PGS).

○ Presentation of the value chain and the supported organisation (ECOFARM)

Before the project intervention, farmers were producing individually in big, medium & small mono cropping farms. They did not know anything about agroecology and were mostly using chemical fertilizer and pesticides. Also, no connection between producers & local collectors were established. At that time, the producers were selling their products directly to middle man in their area without being able to compare with market price before selling.

At the beginning of project, in 2011, vegetable producers started to form vegetable producers' group and, at the same time, local collectors were identified to facilitate, share information on prices & buy products from producers. At farm level, some producers living nearby local collectors were able to bring their products directly to them otherwise, for producers living far away, the collector is going to their place to collect the products. At collectors' house, there is an information board installed by the project to let them write down the buying price of products or producers can call them to check directly the prices.

In 2015, ECOFARM GROUP started with 60 farmers from 7 vegetable producer groups who committed to grow safe vegetables based on quality standards using agroecology techniques which is environment, producers and consumers friendly to supply Siem Reap markets. In 2019, ECOFARM became an Agricultural Cooperative and in 2023, among the 125 members of the AC, 71 are part of the PGS and are producing safe vegetables. The goal of this group is to boost the sales of local quality agriculture products and increase members' income sustainably. Ecofarm's members defined a shared vision represented by the motto "Be Healthy Together". ECOFARM set up a permanent internal monitoring body of agricultural cooperative is responsible of monitoring the activities of the board of directors and the executive manager (AC leader) and ensuring accountability to AC members.



○ **Characterisation of the required quality**

Consumers in Cambodia are becoming more aware of the safety of the food they eat and the effects of pesticides residues on their health. They are demanding new products that are safer. Local producers are facing constraints to meet this demand:

- Limited good local transport to deliver in the right time & ensure the quality preservation of products from Siem Reap to Phnom Penh
- Late payment from buyers
- Packaging products still lack of some tools to prevent the loss
- Competition with products imported from Vietnam and Thailand that better match consumers' expectations in terms of appearance but not in terms of quality and safety

○ **Main stakes producers are facing**

The main constraints for the producers at the beginning of the project were:

- Mono cropping, over usage of chemical inputs, difficult access to market, no knowledge/information of price, no bargaining power
- Seasonal constraints due to water (From April-May)
- Small surface/producers (350m²/HH)
- Limited knowledge on pest management (Only 50% of producers able manage)
- Weak bargaining power with buyers as producers produce individually

The main constraints that the members of ECOFARM are still facing are as follows:

- Vegetable seeds source not germinate well (mostly producers buy from Dom Daek market)
- Transportation from Siem Reap to Phnom Penh (Difficulty between receiver & company)
- Broken vegetables 15-20 Kg/month among 3 tons
- Lack of new techniques/products from buyers (Korea basil, radish, tomato, etc.),
- Limited of data recording
- Physical constraints
- Seasonal constraints due to water (From April-May)



Vegetable production at ECOFARM



○ General information on the case study (DéFiP project)

The project “Development of fish value chains (DéFiP)” aims at improving food and nutritional security and diversifying the livelihoods of rural populations through the development of family agroecological fish farming dedicated to local markets. It is implemented in five countries: Cambodia, Ivory Coast, Cameroun, Congo and Madagascar. After a first phase (2020-2022), the project is now at its second phase (2022-2025), which may be followed by a third one (2025-2028). The main donor is the French Development Agency and the total budget for Cambodia is 404 997 € (phase 2). Activities take place in Siem Reap and Kampong Thom provinces. APDRA implements the project with the Cambodian partner NGO Trailblazer Cambodia Organization (TCO).

○ Presentation of the value chain

The beneficiaries of the project are located in the intermediary plain of Siem Reap and Kampong Thom provinces. They are small scale farmers for who fish farming is usually a little secondary activity, from revenue and time involvement perspectives. They get an income through diverse activities, from which non-agricultural ones often play a key role. They all practice rice farming, despite its often-low financial profitability. They practice fish farming in small ponds (< 1000 m²) filled by rains (average 1300 mm/year). Currently, a dozen of species is reared, mainly tilapia, silver barb, pangasius, catfish and climbing perch but also spot pangasius, snakeskin gourami, pirapitinga, mrigal, silver and common carps. Three main kinds of aquaculture systems are currently tested: pond farming, rice-fish farming and in-pond cage farming.

In order to start a new rearing cycle, farmers need to get fingerlings, provided by hatcheries or nurseries. Hatcheries practice fish breeding while nurseries import fingerlings from Vietnam. Fish breeding is often considered as an activity requesting high technical level and financial investment capacities. Thus, small-scale farmers never operate it.

Produced fish is primarily self-consumed and thus contributes to the food sovereignty. However, as the production increases, farmers wish to put a growing part on sell. They prefer selling locally to villagers as this option offers the best price and there is a high local demand. However, it can be difficult to sell high volumes of fish locally, especially in a brief period. For this reason, some farmers desire to sell their production to middlemen.

Currently, DéFiP does not work with any formal fish farmers’ organisation. The project lets farmers organize themselves as they wish to. Until now, they haven’t felt the need yet. Indeed, technical itineraries and fish production are not efficient enough and this is often seen as a condition for the organization of producers around a manageable production. However, farmers’ networking is a key aspect for the transfer of innovations or the resolution of problems. Thus, in the frame of the project, farmers are organised in local groups made of 10 to 40 beneficiaries from the same area and able to easily interact. In total, six groups are currently meeting regularly for training sessions, exchange visits and group discussions. They are mainly about techniques, such as getting advice about fertilisation or feeding. Material exchanges were also observed, such as the lending of harvesting nets or feed. Service exchanges are mostly seen at harvest, when farmers help each other.



○ Characterisation of the required quality

Quality of the final product is mainly determined by 3 factors: species, size, season. A fish will be sold at its highest price if he reaches a standard individual weight, depending on the species. The factors determining quality, detailed above, can vary depending on the consumers. In the case of home consumption, the species' choice is influenced by the personal taste of household members. Farmers focusing only on self-consumption may want to have smaller fish, to be able to produce more of them and harvest on a daily basis during a longer period of time. When considered as buyers, villagers are less demanding than middlemen.

Cambodians traditionally eat wild fish and thus have an aversion to aquaculture fish, considered as less natural, less tasty. However, this consideration has been changing progressively as natural resources have been depleting and people become more aware of aquaculture realities. Still, this behaviour impacts the perception of quality of the products and some farmers try to make their production "as natural as possible" for consumers' perception. For example, the family of one farmer rearing climbing perch in cage was reluctant to eat fish fed with industrial pellets. Finishing with azolla (aquatic fern) two weeks prior to harvest made the product acceptable for the family.

○ Main stakes producers are facing

Small-scale farming has not yet been proven effective and profitable. There is currently no or little technical reference. They work with relatively small surfaces, it requires semi-intensive or intensive practices to get an appreciable production, requiring higher financial investment abilities. In this context, getting a substantial profit margin is hard.

A major constraint is the seasonal rainfall fluctuation, with a rainy season characterized by floods and a dry season marked by water scarcity. As farmers are located in a plain, their ponds can be flooded, leading to the escape of reared fish and introduction of wild fish, including predator species. As a consequence, farmers do not really know what is in their ponds, as they do not master the entry of wild species. At the opposite, during the dry season, fish end up in a reduced quantity of water, increasing pollution risks. As every year is different from another in terms of intensity and periodicity of floods and water scarcity, these risks are uneasy to anticipate.

Farmers deal with a range of issues when it comes to fish selling. The lack of networking is among the most constraining. Farmers with social and marketing skills are able to easily sell their fish at a good price to other villagers. Selling to middlemen offers the opportunity to sell bigger quantities at one time but comes up against other challenges. Farmers are not well linked to intermediaries. Moreover, they cannot meet quality demand from middlemen. Thus, these buyers are in a dominant position to impose lower prices. At a national level, fish price is maintained low by imports from neighbouring countries, particularly Vietnam.



Fish production around Siem Reap

○ General information on the case study (SCCRP project)

As part of the Support to the Commercialisation of Cambodian Rice Project (SCCRP) supervised by the Supreme National Economic Council (SNEC) of Cambodia and financed by AFD from 2013 to 2017, AVSF and IRAM (together with other partners) have initiated the development of a large-scale Organic rice value chain in Preah Vihear province and the creation of “Preah Vihear Mean Chey Union of Agricultural Cooperative” (PMUAC), the first Union of Cooperatives registered in Cambodia.

In only 4-5 years, this project has been able to set up a strong organisation and an efficient supply chain. Yet beyond this initial project, AVSF has maintained some support to PMUAC through different follow-up projects: i) a joint project AVSF - Ethiquable, from 2017 to 2023, ii) a series of short assignments between 2018 and 2021 (as part of ASPIRE project, financed by IFAD) to strengthen the knowledge and capacities of Agricultural Cooperatives member of PMUAC on rice value chain, rice processing and storage, and market, iii) additional support via the mobilisation of AVSF own financial resources from 2020 to 2023.

○ Presentation of the value chain and the supported organisation (PMUAC)

Rice is a predominant crop in Cambodian agriculture sector, with a multitude of producers, middlemen, and processor/traders. When the intervention starts, in 2013, Cambodia is in the process of developing its rice sector with, in particular, the objective of increasing the share of paddy processed within the country and exported as milled rice. This is supported by a national public policy setting ambitious objectives for rice export, and by private sector investments in rice milling facilities.

In Preah Vihear province, PMUAC is an important stakeholder of the rice value chain. Decision of creation by 8 cooperatives in March 2015 with a clear purpose of ensuring the sustainable implementation of internal control for organic standards, PMUAC is officially registered in 2016 and rapidly aggregates more members, up to 25 ACs. It scales up its activities allowing to hire and maintain staff, and progressively try to start to expand and diversify its activities: process, package and sell by itself a small part of the organic paddy produced, start to diversify on secondary value chains (peanuts...).

Managed by a Board of representatives of its member cooperatives, PMUAC primary role is to ensure the compliance of farmers with organic standard and implement internal control. Member cooperative pay a fee to the Union based on the volumes of paddy sold as organic, which provide the Union with the capacity to pay a team of approx. 12 full-time employees.

As of March 2023, PMUAC groups together a total of 25 Agricultural Cooperatives, members of the Union, representing a total of 5,403 farmer households located in all the 7 districts of Preah Vihear province (see details in the box below).



Among other key players, Cambodian rice millers and exporters, notably AMRU-Rice, are playing a crucial role as the main buyers, especially for PMUAC. The French company Ethiquable has also started to buy fair trade – organic rice produced by members of PMUAC since 2017. Public services of the Ministry of Agriculture, Forestry and Fisheries were also engaged in the process, notably the Department of Agricultural Cooperative Promotion, the Department of Agro-Industry, and the Provincial Department of Agriculture, Forestry and Fisheries of Preah Vihear.

○ **Characterisation of the required quality**

Different types of rice varieties are included in the contract farming agreements with the millers/exporters, including both fragrant photosensitive varieties (“Jasmine” types of varieties) and white rice varieties. The main specificity of the quality requirement is of course the compliance with some international organic standards, namely the EU organic standard (EOS) as well as the USA’s NOP standard. Compliance with organic requirements is verified by a third-party international certification body (Ecocert).

Secondarily, the buyers have defined (yet with some room for negotiation with cooperatives and PMUAC) a set of additional quality criteria, defining classes of quality according to which each batch of paddy delivered by farmers will be evaluated, leading to adjustments of the price paid for each batch. Criteria considered are including varietal purity, moisture content, rate of broken kernels. Regarding these criteria, the evaluation of each batch is done directly by the buyers’ staff (millers/exporters) when they collect the paddy.

Last, for the case of rice supplied to Ethiquable, compliance with the SPP fair trade label (“Symbole des Producteurs Paysans”) is additionally needed and requires a certification.

○ **Main stakes producers are facing**

Productivity of rice farms in Preah Vihear is limited, but the organic premium brought by the certification and contracts with buyers contributes to make rice farming profitable and increase smallholder farmers’ incomes. Besides organic certification, some other difficulties were encountered at the early stage of the contract farming with buyers. The quality of paddy, in particular important percentage of broken kernels which was due to hand harvesting and lack of labour force, leading to an harvest not always at the optimum time, then inadequate drying on-farms.

Another issue is the shift from a practice based on nursery and transplanting to direct seeding. This change is driven by both climate change (drought, late rain...) and by a lack of labour force. It is leading to higher competition with weeds. This may lead some farmers to step back from the organic scheme, or lead to an increase use of herbicide by conventional farmers around, hence an increased risk of contamination of organic plots.



Rice nursery in Preah Vihear province

Case study #5

Agrisud

Supporting the agroecological transition in peri-urban family farming through offering services



○ General information on the case study (IADA project)

The IADA project (Intensification Agroécologique et Diversification de l'Agriculture péri-urbaine dans la province de Siem Reap) is implemented since 2016 within the framework of the decentralized cooperation between Siem Reap Province and Conseil general des Hauts-de-Seine, and co-financed by the AFD. After two first phases, the third phase of IADA project is implemented since 2022 to 2025. The objective of the project is to improve and secure the living conditions of small family farms in the Province of Siem Reap.

Therefore, IADA project aim to three objectives: i) continue agro-ecological intensification and diversification of local agricultural production, ii) develop an offer of agricultural services for the professionalization of farms and agricultural sectors (via master farmers, OSPs and the Green Farmers organization), iii) support the transition towards territorial food systems.

○ Presentation of the value chain and the supported organisation (Green Farmers)

Siem Reap hosts the majority of Cambodia's tourism, this tourist and demographic growth creates a strong demand for fresh produce. In consequences, the demand is largely provided by imports from neighbouring countries, competing with the local offer. The local value chain is composed by a multitude of small family farms producing fruits and vegetables. Then, village collectors buy products from local producers and transport them to the market, where they resell them directly to retailers or wholesalers at a margin. These wholesalers occupy a very important position: the majority of "imported" fruits and vegetables from other production areas (neighbouring provinces or countries) pass through them. Wholesalers also obtain part of their supplies from local suppliers (collectors who provide the link with producers), but their supply from external suppliers allows them to ensure the supply of a wide variety of products on a regular basis. This also allows them access to the market of Hotels, Large Restaurants and supermarkets who prefer to manage their supplies with a very limited number of suppliers who can deliver the products they need on a daily and safe basis.

The Green Farmers Association was created in 2018 to help the offer from local family farms to meet the demand of the market. It has over 419 members in 34 villages. It houses the activities of collecting, transforming and distributing local agricultural products, as well as marketing, labeling, promotion (fair ...), advocacy / lobbying, research for new markets. Its purpose is to improve the living conditions of farmers through products with higher added value; it is also to promote environmentally friendly production methods. The association was created to i) mobilize production, centralize orders, ii) be the producer representative for the communication part, iii) be the sales representative, iv) support the cash flow of producers. The Green Farmers Association work with 12 staffs in charge of accounting, logistic and commercialization. It also managed 5 agro-processing groups each using an agro-processing unit to produce essential oil, dry spices, herbal tea, neem powder.

In 2023, Green Farmers has partnerships with hotels (Sofitel, Templantation), restaurants (Khema, Banlle, Institut Français), hospitality schools (Paul Dubrule, Sala Bai, Spoon), supermarkets (Makro, Farmer market, Cam happy mart), transformers (Bodia, Senteurs d'Angkor, Confirel).



○ **Characterisation of the required quality**

The COVID-19 crisis initiates an increase of the interest and of the demand for safe and healthy products. A growing demand for healthy and local products, a demand expressed as much by hotels and restaurants as by supermarkets and even by Khmer consumer markets given the health risks attached to imported products, but above all the taking of awareness of consuming well during the pandemic.

The demand of hospitality industry and local have some particular traits such as a need for diverse products, and a regular supply. Also, the restaurants need some products (lettuce for example) that were not commonly produces by the local family farm. On the other end, the market for processed products still remains very limited, in fact its marketing is very regulated, especially in supermarkets, where there is a demand for standard certification (GMP, etc.) which association status cannot request.

At wholesalers level, they mostly struggle with logistics costs. Wholesalers have a higher level of requirements regarding the choice of their suppliers: quality, regularity of supplies, service (notably delivery). The diversity of the products offered and the service (ease of ordering, delivery) are essential criteria that must be met by collectors or intermediaries who want to claim to supply wholesalers. The same type of criteria is also applied to the category of very large hotels and restaurants which manage their supplies through orders to as limited a number of suppliers as possible, who ensure delivery of the products.

○ **Main stakes producers are facing**

The family farm in Siem Reap Province are small scale farms with few investment capacities. Individually, they are unable to ensure the volume, regularity and diversity of products needed by local demand. Regarding the production methods, because agriculture is not valorized, there is a lack of technical knowledge for the farmers on fertility management, pest management, etc. Maintaining the level of production around the year is also difficult because the access to water can be difficult in dry season or there can be flood in rainy season. The climate change increases the intensity of these events.

Also due to the lack of communication between the actors of the supply chain, little is known by the farmers about the quality requirement of the local professional demand. It is reinforced because of the low level of literacy of many farmers. Finally, the main constraints are: i) flooding of numerous vegetable production lands in the rainy season and competition with rice farming activity (labor, and cash necessary for purchasing inputs), ii) lack of water in the dry season to further develop production, iii) lack of financial capacity to make investments, lack of technical skills to develop new productions, lack of feedback on demand.



Tumeric power produced by a GF's processing group



Thank you for attending!

Presentation materials will be sent as soon as possible.

Our website:

<https://www.groupe-initiatives.org/>

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