



Logics of having the national cassava sector policy



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1. Overview of the cassava sector

ក្រសួងកសិកម្ម រុក្ខាប្រមាញ់ និងនេសាទ អង្គជំរឿនជនបទ អង្គជំរឿនកសិកម្ម

(សម្រាប់ប្រើប្រាស់ក្នុងការបង្កើតផែនទី)

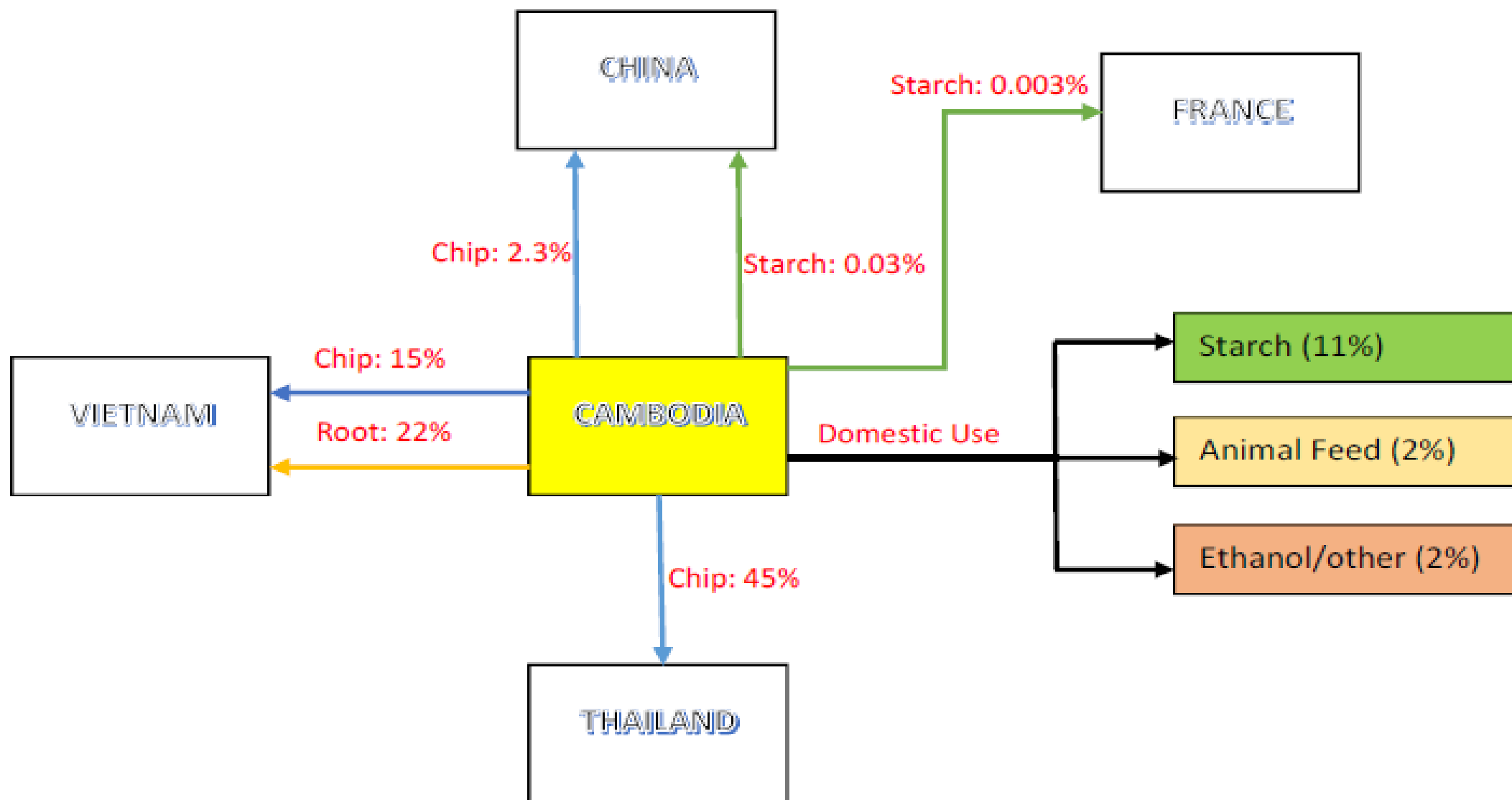


អង្គប្រឹក្សាប្រតិបត្តិ	អង្គជំរឿនជនបទ	អង្គជំរឿនកសិកម្ម	អង្គជំរឿនឧស្សាហកម្ម និងរ៉ែ	អង្គជំរឿនសង្គម	អង្គជំរឿនស្ថាប័ន
អង្គជំរឿនស្ថាប័ន	អង្គជំរឿនសង្គម	អង្គជំរឿនឧស្សាហកម្ម និងរ៉ែ	អង្គជំរឿនកសិកម្ម	អង្គជំរឿនជនបទ	អង្គជំរឿនប្រជាជន

អង្គប្រឹក្សាប្រតិបត្តិ	អង្គជំរឿនជនបទ	អង្គជំរឿនកសិកម្ម	អង្គជំរឿនឧស្សាហកម្ម និងរ៉ែ	អង្គជំរឿនសង្គម	អង្គជំរឿនស្ថាប័ន
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Cambodia's cassava based products





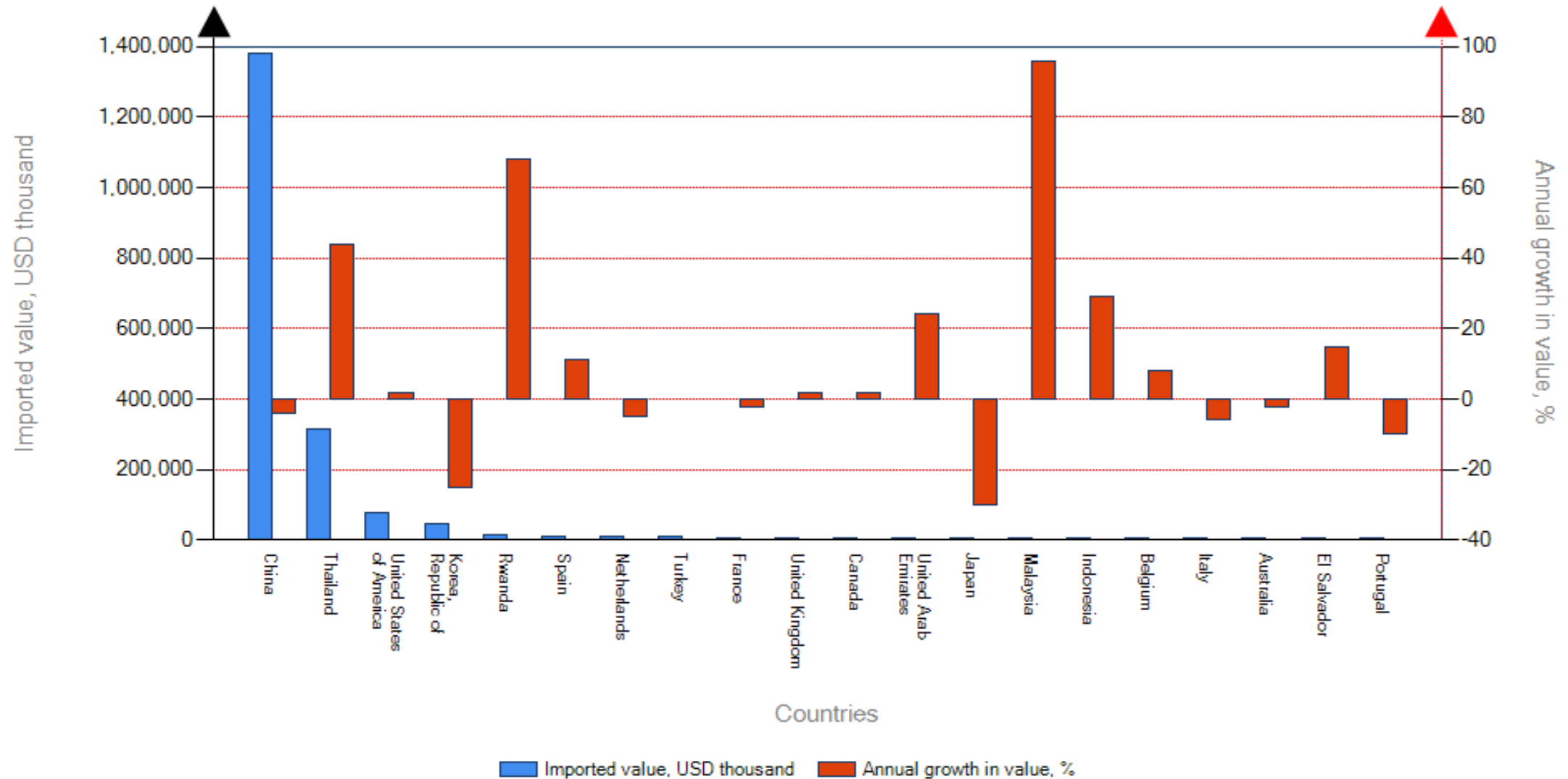
Source: Value Chain Study, UNDP, 2015



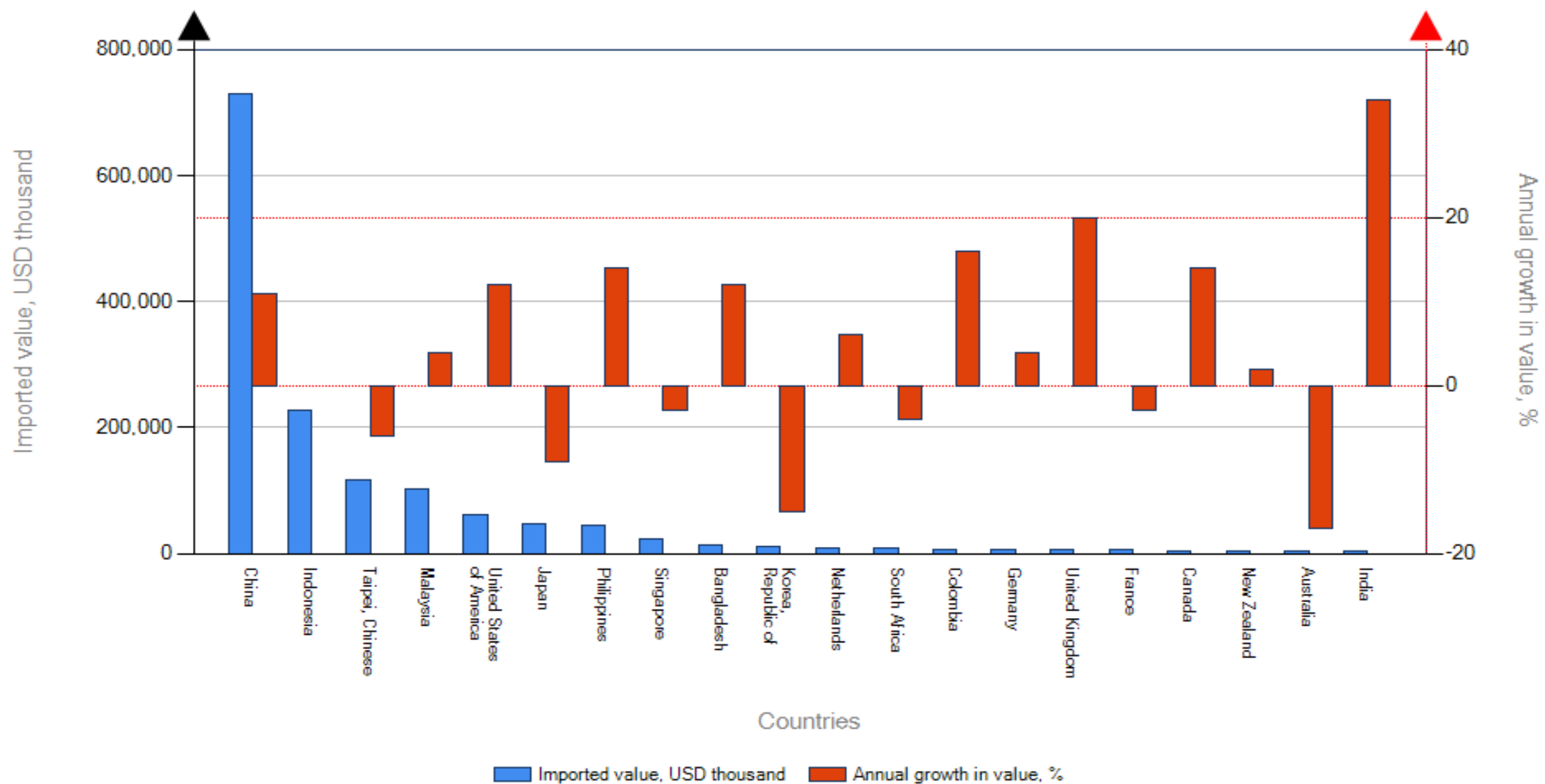
2. Cassava markets

List of importers for the selected product in 2016

Product : 071410 Fresh, chilled, frozen or dried roots and tubers of manioc "cassava", whether or not sliced or in the form of pellets

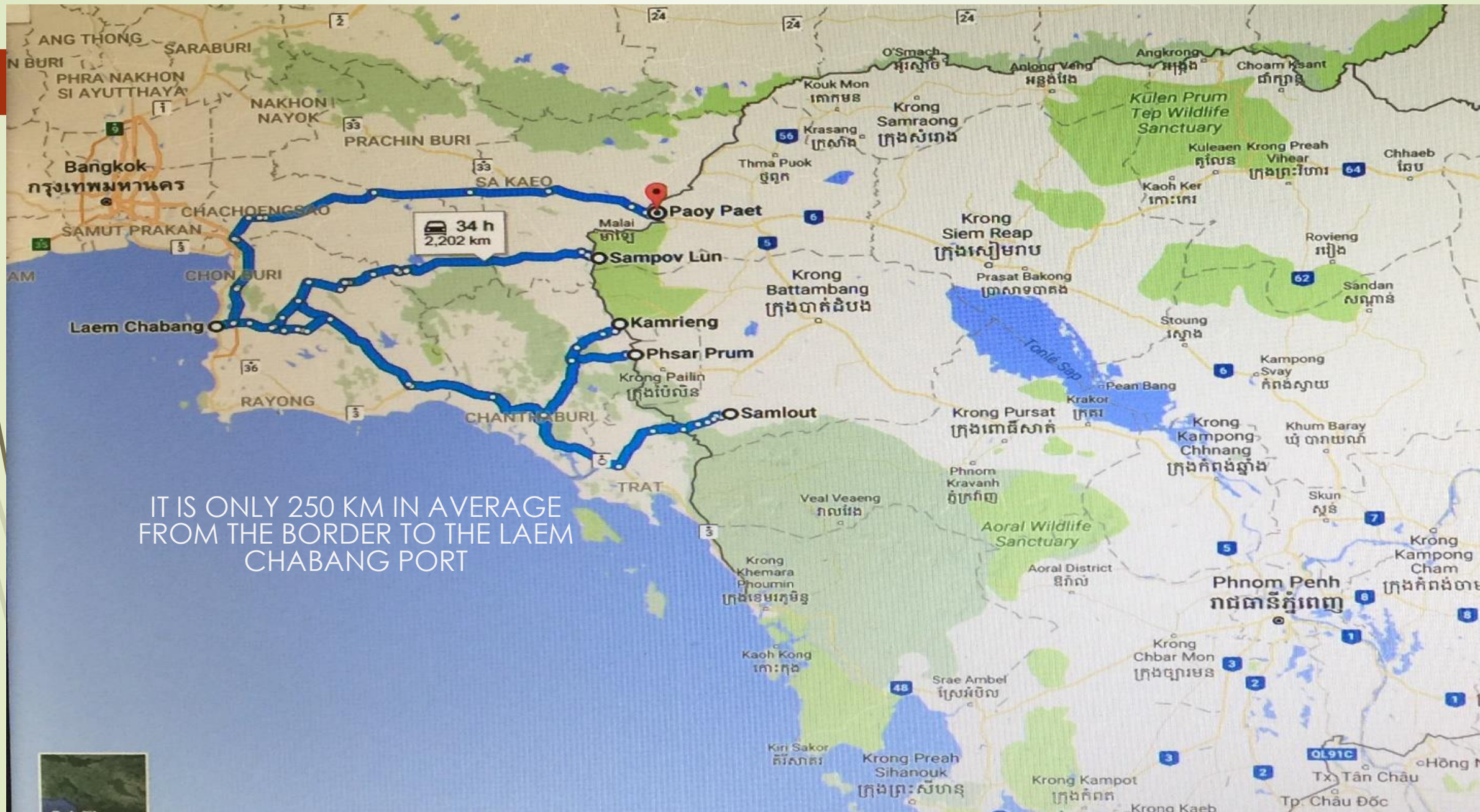


List of importers for the selected product in 2016
Product : 110814 Manioc starch



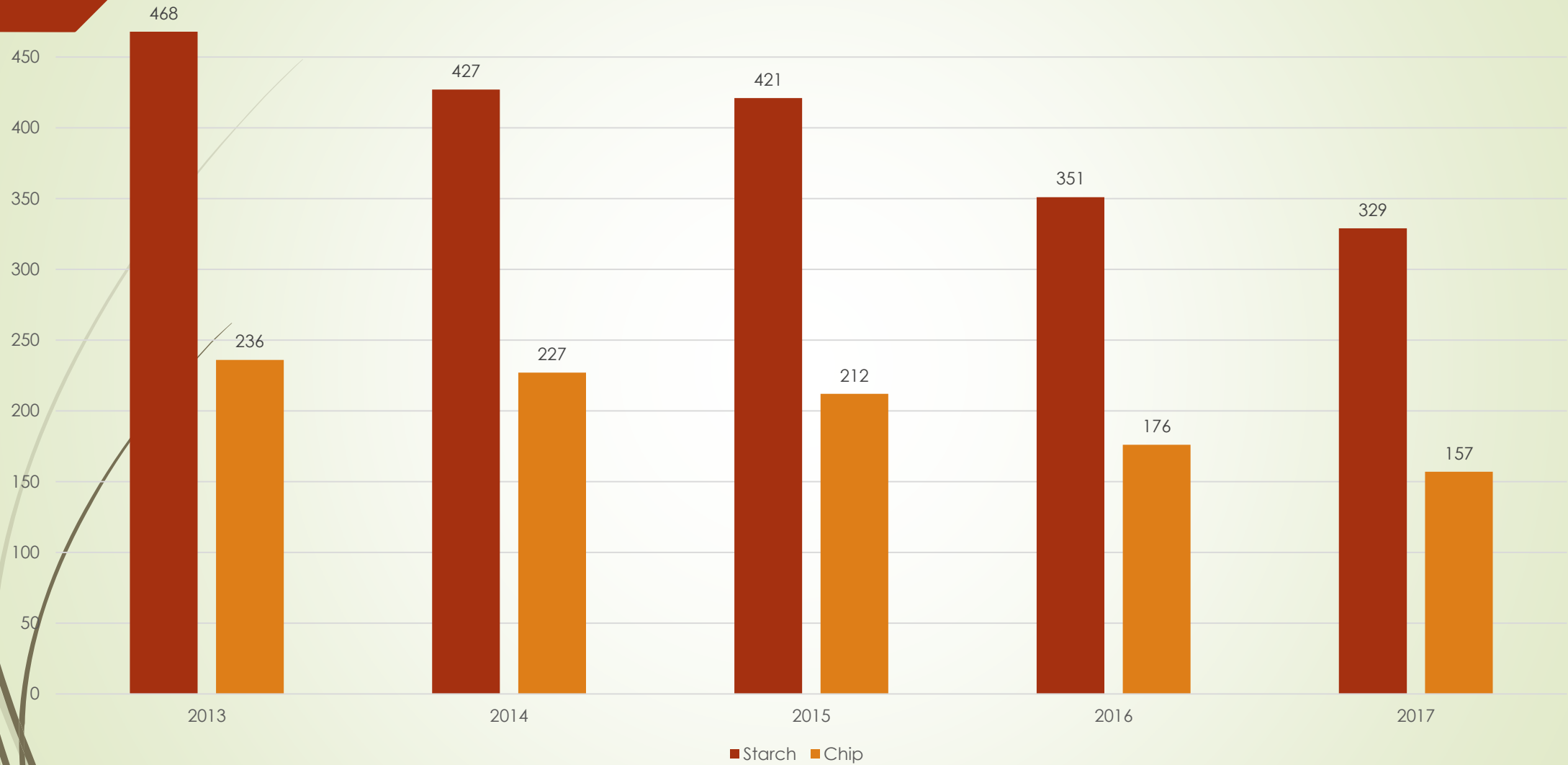


3. Export challenges



Prices of cassava products (source: TTTA)

500

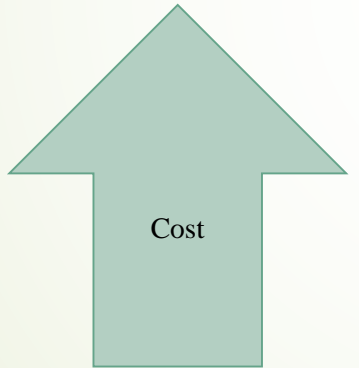
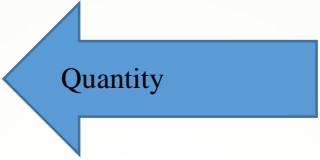




4. Strategic framework and sector development



Current trade



Supply chain

- Gain
- Break even
- Loss

Competitiveness

Trade costs

Processing costs

Production costs

Suppliers



Cambodia


Marketing

Market access

Capitals



Market based production:

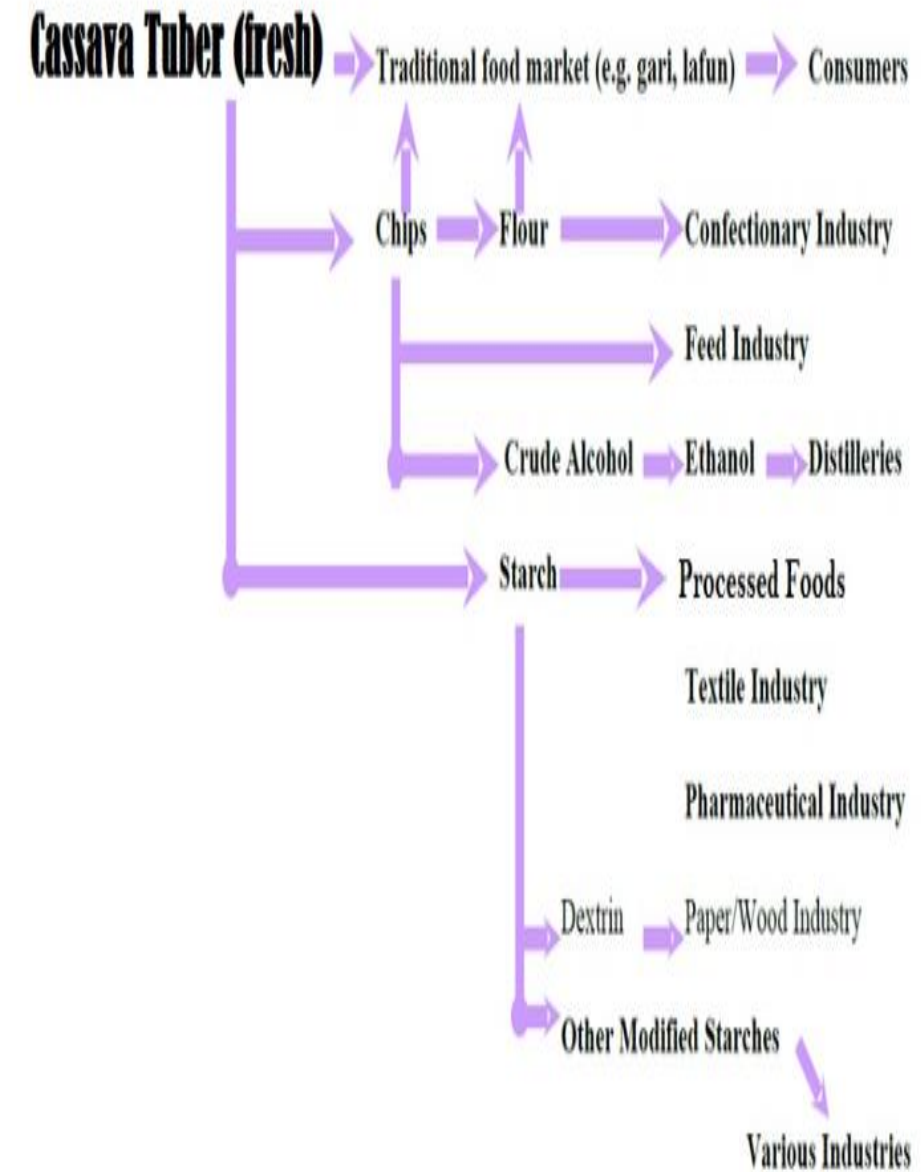
- **Competitiveness** based on the logics of price fluctuation, climate change and unpredictable demand
 - **Profitability and sustainability** of the production (farmers) and processing industries
- 



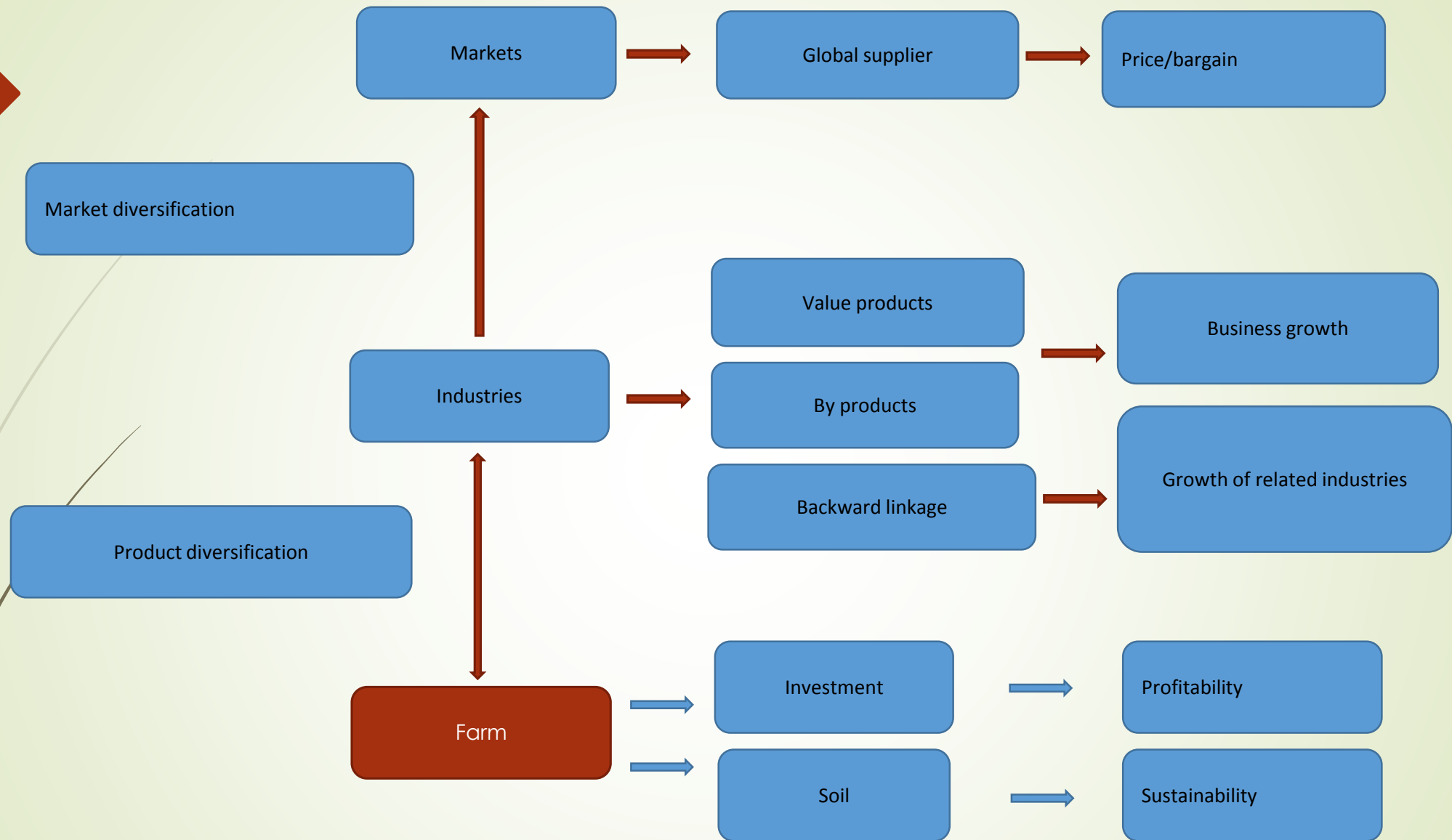
Market

Production

Diverse Importance of Cassava



Market Chain for Industrial Cassava Products



How to integrate into global markets

Key strategies: (buyers -> processors <- farmers)

- ▶ Processing industries- start with the export of native starch and create demand of starch for domestic markets
- ▶ Large scale investment to exploit all values from cassava processing
- ▶ Link processors to farmers through contract farming to keep factories running for year-round
- ▶ Maintain and enhance competitive advantages at farm
- ▶ Maintain trade preferential treatment and market access
- ▶ Link with backward industries to process cassava residues/wastes which can be cheap agricultural inputs for farmers (fertilizers, animal feed)
- ▶ Low cost production and smart climate change adoption- sustainable agriculture and profitability at farm
- ▶ Research and Development Institutes (production, processing and market)



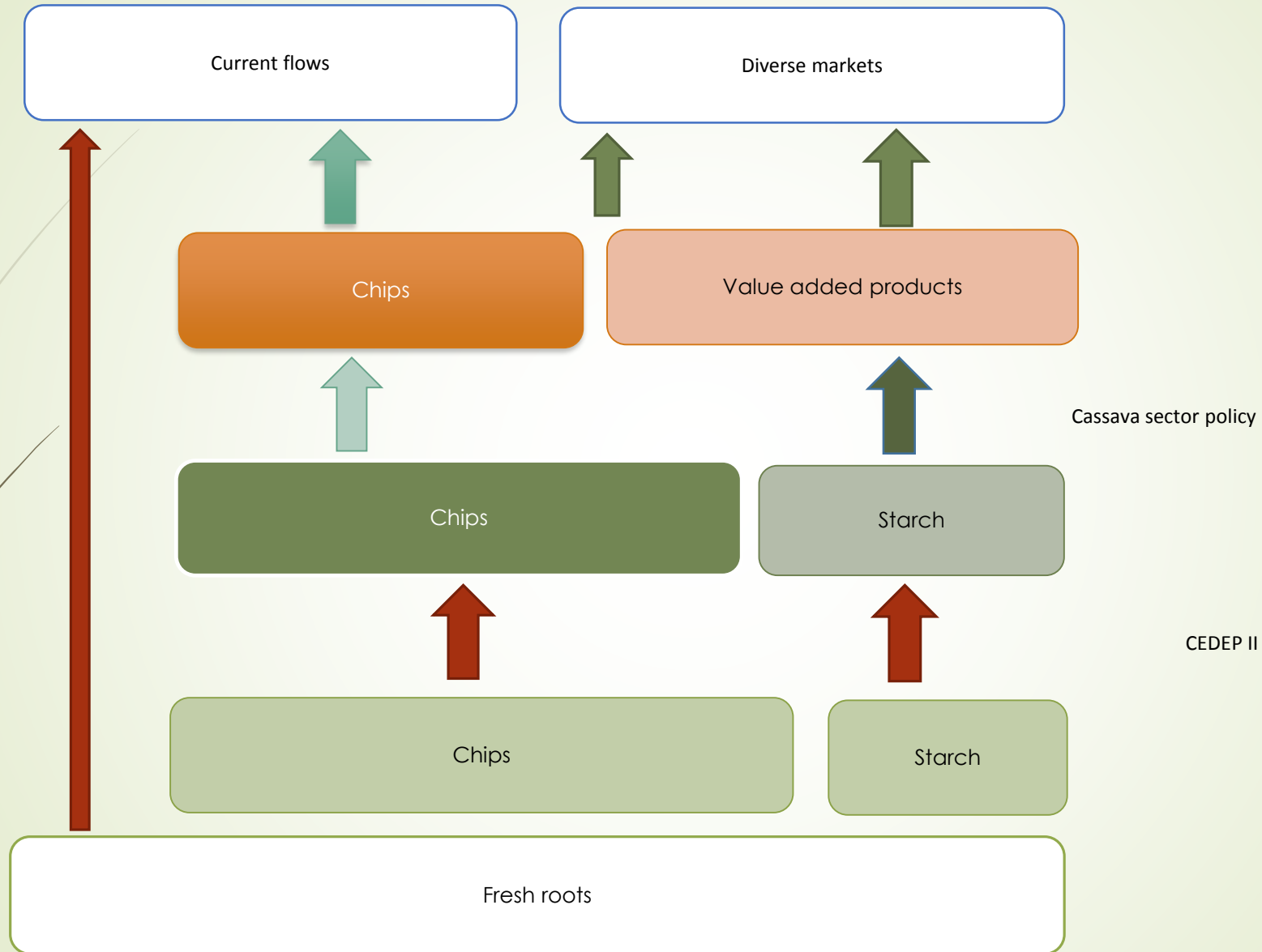
Why needs a national policy?

- Set a clear vision for the sector
 - Investment and support for the sector (public and private)
 - Alignment of development interventions (existing and new projects)
 - Effective value chains (individual reaches its own productivity)
 - Sector governance: contribute to enhance competitiveness and remove barriers, bottlenecks (failure causing lack of information and understanding each other's roles)



How we start the sector development

- Make existing processors success: achieve their scale, increase volume of export and meet market needs (price, quality and quantity)
 - Attract investment to set up more processing industries in key production areas based on an inclusive, sustainable and competitive business integrated model
- ➔ Absorb cassava from other areas which are competitive and/or assist farmers in other areas to transition to grow other crops which are suitable to their geographic, logistic and socio-economic conditions





Thanks!!!

