



# Cambodian consumers' knowledge and perception toward food quality and safety.

*Fruit and Vegetable Sector*

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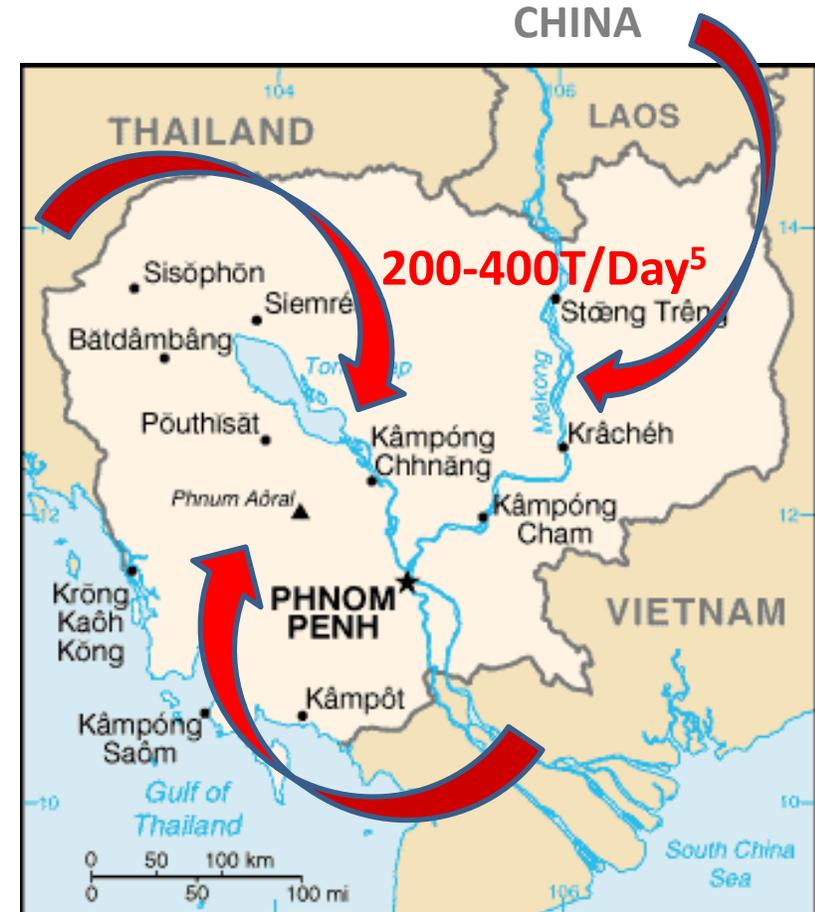
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## Cambodian Context

# F&V sector

- Low local F&V production according to the needs<sup>1</sup>.
- 50% of fresh fruits and vegetables consumed in Cambodia are imported<sup>2</sup>.
- Low safety and quality control<sup>3</sup>.
- Only CamGAP certification has a legal status by the government<sup>4</sup>.



Wikimedia Commons

<sup>1</sup>AGRICULTURE AND AGRO-PROCESSING SECTOR IN CAMBODIA

<sup>2</sup>SNV

<sup>3</sup>USAID 2015 and Ministry of commerce

<sup>4</sup>General directorate of agriculture

<sup>5</sup> Center for Policy studies



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**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 Thailand 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.



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## Methodology of the survey

# Time frame of the survey

**November 2017 until April 2018**

**Literature review and methodology setting up**

**Datas collection**

- Interviews retranscription

**Results presentation**

Implementation to the marketing strategy

**Interviews and field work**

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

**Analysis**

- Thematical analysis
- Link with the literature

# 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)

## Consumer survey

Households – Shops – Restaurants – Hotels – Super Market

### Theme

#### Behaviors

#### Knowledge

#### Expectation

### Subtheme

- Place/Supply
- Decisional Criteria
- Practice/Strategy
- Constraints

- Safety/Quality
- Local/Imported
- Information

- Quality/Safety
- Certification
- Information
- Improvement



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**Results of the  
consumers' survey**

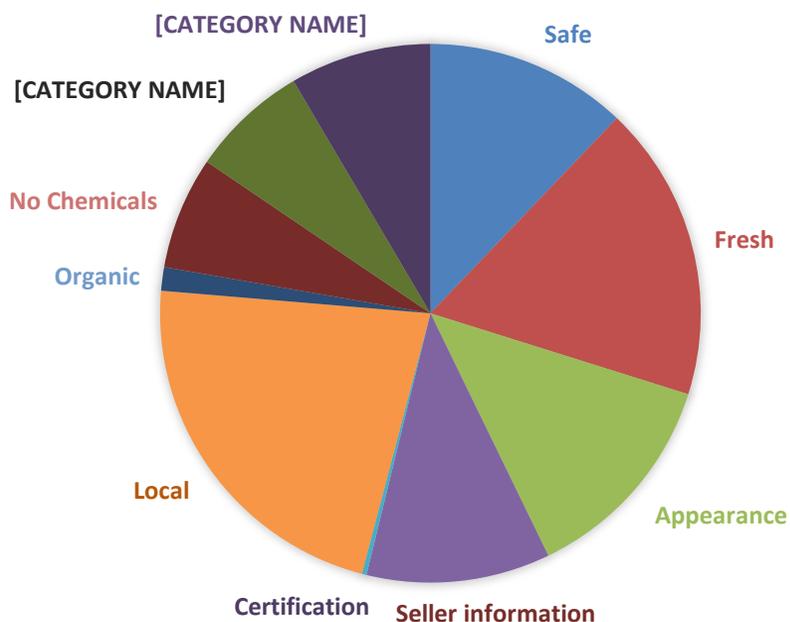
# Household survey

## Behaviors:

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



## DECISIONAL CRITERIA



- 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:

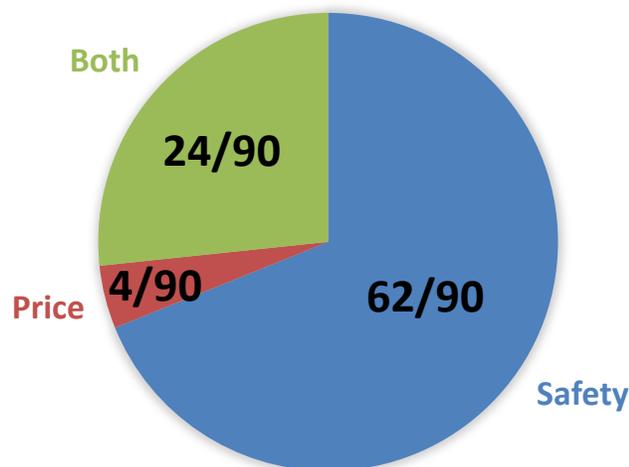
**Others:** smell, touch, taste, natural

# Household survey

## ▶ F&V purchase strategy:

- Consumers would like to buy more local products, but sometimes they have no choice.

### FOOD SAFETY STRATEGY



*« 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 expensive.”*

**Focus Group Battambang**

**LOCAL PRODUCTION'S CONSTRAINTS**

## Knowledge and awareness:

- Food quality and safety are highly linked to the origin

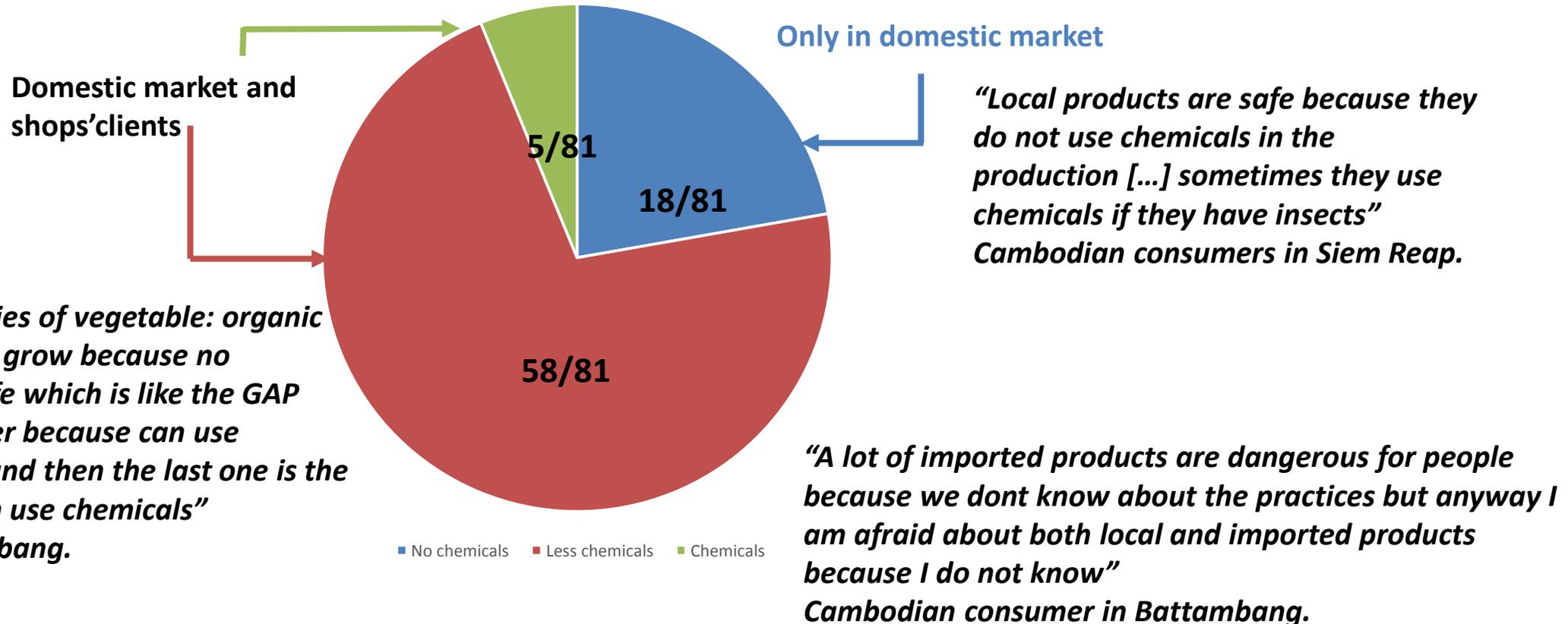
Criteria	Safety	Quality
Local	×	×
Chemical free	×	
Price	×	
Fresh		×
Taste		×
Appearance		×

- 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

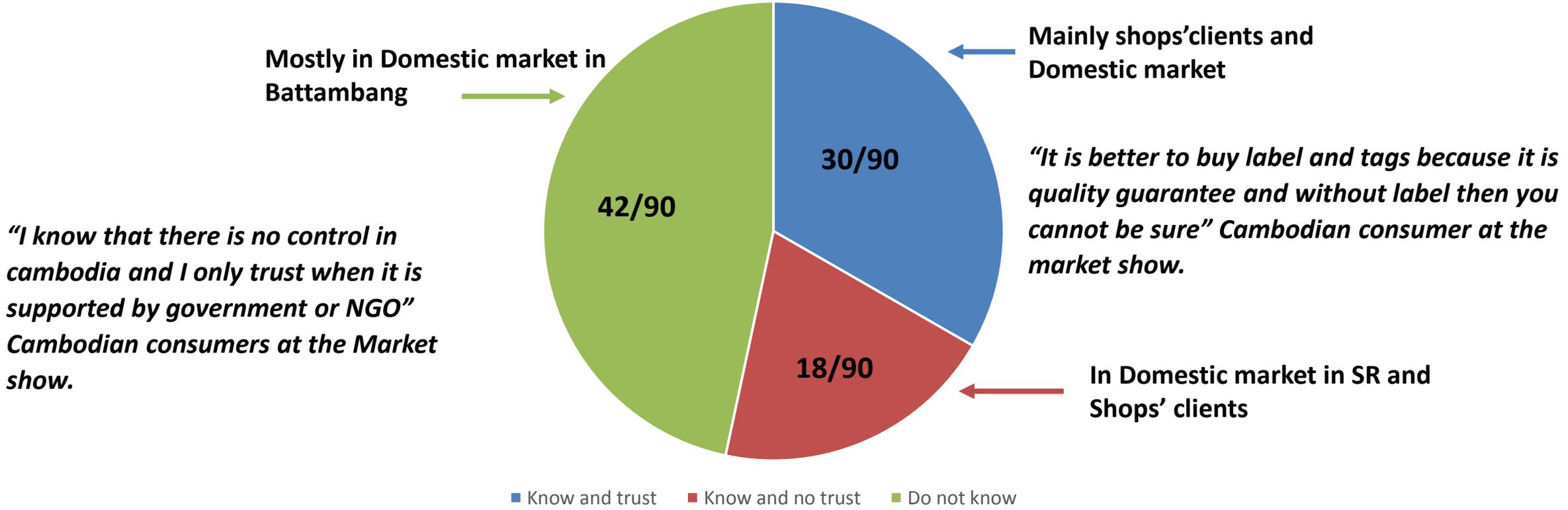
## LOCAL AND LINKS WITH CHEMICALS



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

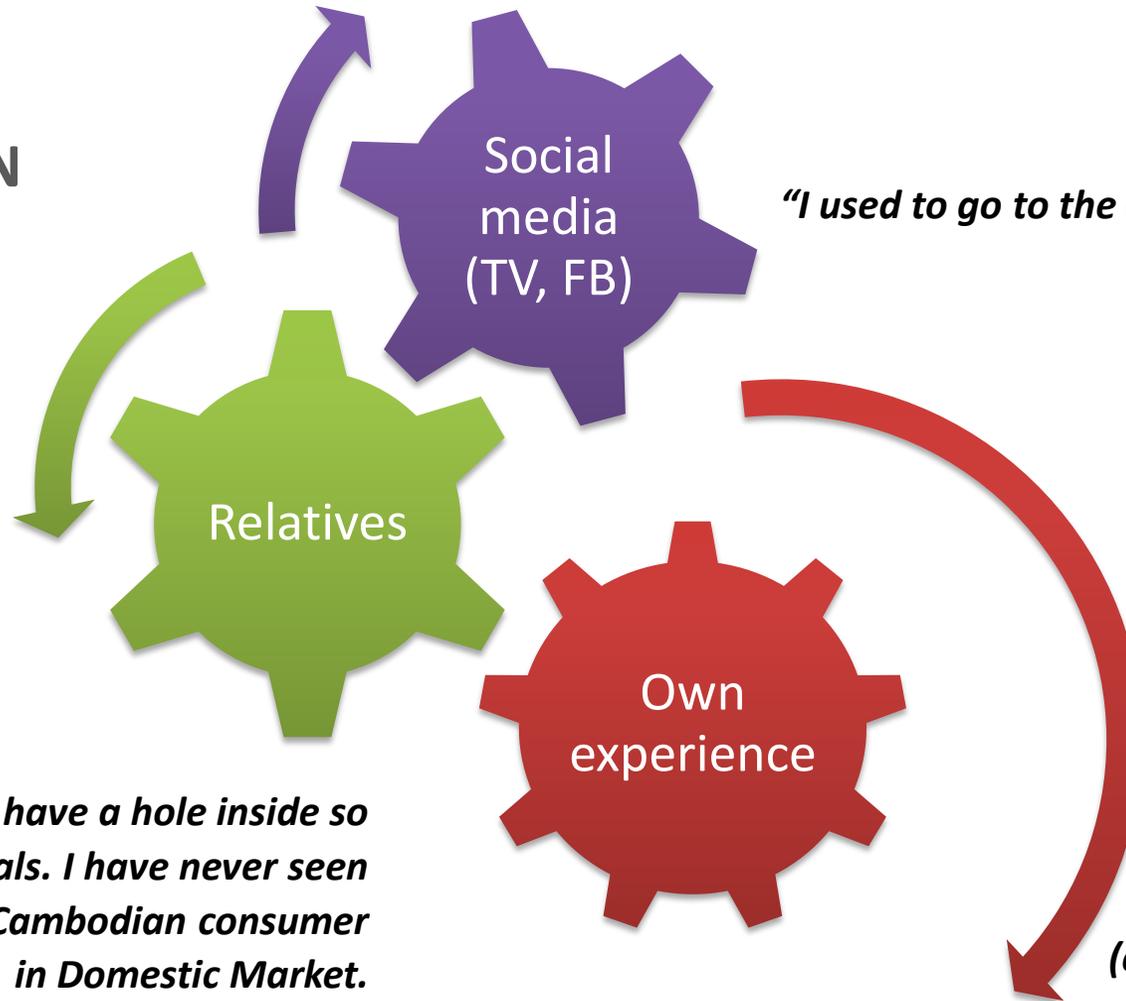
# Household survey

## CERTIFICATION PERCEPTION



# Household survey

## INFORMATION SOURCES:



*"I used to go to the domestic market but I got health problems so now I go to the shops" Cambodian consumers in Shop*

*"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*



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# **General feedbacks & Conclusion**

# General feedbacks

## 1. CAMBODIAN CONSUMERS HAVE KNOWLEDGE AND ARE AWARE TOWARD FOOD QUALITY AND SAFETY. IT IS INCREASING.

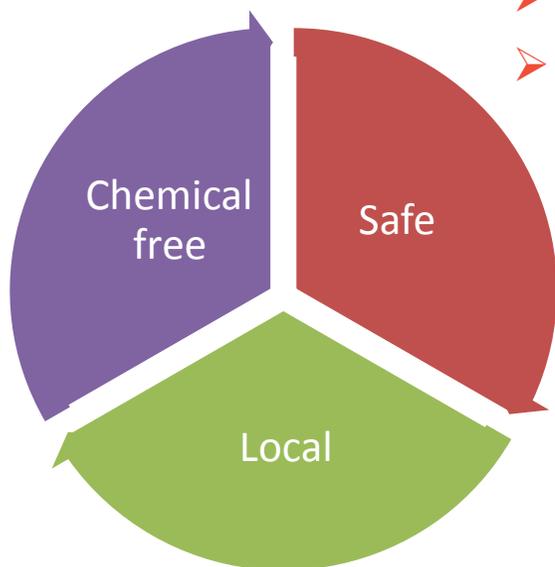
*“They are now aware even the middle or higher class, they start to aware and they start to buy even if it is small quantity because they don’t want their children to become sick.”*

*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

# Link with local food system

*“A key challenge for decision makers is identifying laws, policies and regulations that will promote food security, safety and sustainability and improve nutrition and diet related to health, within the context of a rapidly changing food supply”*

**The University of Sydney**

- 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.