



Consumer Awareness on Food Standards in Cambodia

06 December 2018 | Phnom Penh, Cambodia

**Results of Country Surveys conducted by GIZ
and Consumers International (CI) in 2017/2018**



General Background



- **Food safety** is an important topic for several countries in the ASEAN region.
 - *Each year, an estimated 5 billion cases of diarrhea were reported globally in children above 5 years, of which 3.2 billion were from Southeast Asia*
- For many of these countries, in particular the CLMV, the agricultural and food-processing sector also means an important source of **livelihoods** for the people and a leading **export** sector.
- Unfortunately, in several ASEAN countries, esp. the CLMV, the **consumer protection** systems, including official mechanisms for ensuring food safety, are still at a **nascent** stage.
- ➔ The significance of industry voluntary actions such as compliance with international **standards**, risk management throughout the production chain, and other sustainable & ethical **business** conducts.
- ➔ The need to provide consumers with **information** and raise **awareness**



- In 2017-early 2018, GIZ commissioned Consumers International (CI) to conduct a series of country surveys in three countries of the ASEAN region, *viz.* Cambodia, Myanmar and Vietnam
- The surveys were aimed at **evaluating consumer awareness**, knowledge, attitude and perception (AKAP) on **organic** and **GAP** (Good Agricultural Practices) certified products in ASEAN, with a view to **building the foundation for future** capacity building activities.
- The surveys were conducted by CI in coordination with local partners:
 - Cambodia: Cambodian Institute for Research and Rural Development (CIRD)
 - Myanmar: Myanmar Consumers Union (MCU)
 - Vietnam: Vietnam Consumers and Standards Association (VINASTAS)



Methodology & Process



- Main target group: middle-income consumers residing in urban centers/main cities of the three countries

	Low income	Lower to middle income		Middle and higher income	
Cambodia	< US\$200 per month	US\$200-250	US\$250-350	US\$350-700	> US\$700

- City: Phnom Penh
- Sample size: at least 150 individual consumers, randomly selected at 04 types of locations (with equal divisions)
 - Unorganised wet markets
 - Organised wet markets
 - Organic stores
 - Grocery stores located at higher-end shopping malls
- Methods: Direct interviews in local language at point-of-sale using a common structured questionnaire (adapted according to country context)



The questionnaire comprises of:

- 02 screening questions (to ensure relevance)
 - Whether the respondents were mainly or jointly responsible for buying food and grocery items in their households
 - Whether they have ever heard of either the terms 'organic' and 'GAP'
- 06 questions on demographic information:
 - In addition to survey locations and income groups, analysis were later done also according to demographic information (gender, age and education level)
- 19 substantive questions on different aspects of consumer AKAP regarding organic and GAP-certified products



Demographic snapshot of respondents in Cambodia

**Total sample
152**

Education
Secondary -
high school:
39%
College & Uni
35%

**Gender -
18% male
82% female**

**Three largest age group –
25-34 yrs: 34%
35-44 yrs: 26%
45-54 yrs: 18%**

Household average net income per month	Less than US\$200	From US\$200- 250	From US\$250- 350	From US\$350- 700	Above US\$700
	5%	9%	22%	32%	32%





Survey Results



Motivation: 90.13% of Cambodian consumers participating in our survey indicated their **concerns for health** as the most important factor influencing purchase decisions and practices vis-a-vis food stuffs and groceries

Elements considered while buying foods & vegetables:

- **Health & safety: 84%**
- Price/affordability: 45%
- Brand-name: 38%
- Taste: 36%
- Availability: 32%
- Certification of origin/quality: 27%





The concerns for health accordingly affect their Perceptions regarding organic and GAP-certified products

- 96.7% thought organic = **natural**
- 97% thought GAP = **safe** food products
- 81.6% believed organic foods are **healthy** while 84% believed GAP products are so
- 44.7% thought organic products are **free from chemicals** and 22% thought so of GAP products





Most popular Sources of Information used by consumers

For organic products:

- 45% favoured television and radio programmes
- 38% words of mouth
- 36% use the Internet to search for information

For GAP products:

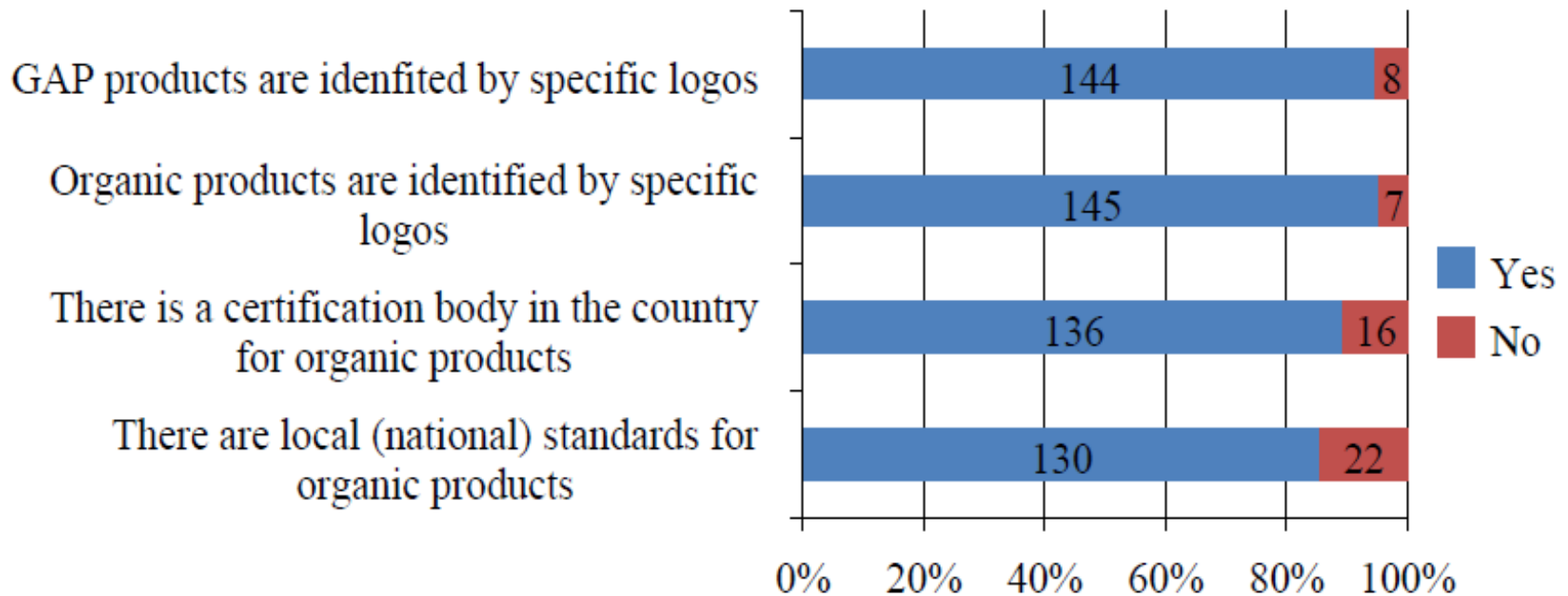
- 49% TV and radio programmes
- 37% the Internet
- 35% word of mouth





Awareness: Close to **95%** of Cambodian consumers knew that organic and GAP products are **identifiable** by specific logos

Awareness about standards, certifications, etc in Cambodia





Clear Preference for organic and GAP products amongst Cambodian consumers, esp. the higher income group

- 46.71% of survey respondents chose organic products
- 18.42% chose GAP products





Lower price – A very important for buying (more) organic/GAP products

- 65.13%: Very important to have lower price
- 32.89%: Important to have lower price

Other important factors:

- More advertisement
- More information
- Wider selection
- Greater availability
- Greater visibility





Consumer trust: Who verify the product and provide information?

- 87.5% relied on specific sellers (stores/markets) to provide information
 - 29.6% did their own research and gathered information by themselves
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- 45.4% thought the Government should provide verification services
 - 13.8% relied on independent certification bodies
 - 11.8% relied on NGOs working with farmers
 - 29.6% relied on the farmers





Other statistics

- 84.9% consumers have consumed both organic and GAP products in the past
- The most popular products include vegetables, fruits and rice
- Most consumers preferred to go to open air/street markets, then organic stores
- A majority quoted 'supporting local farmers' and 'nutrition & health benefits' as strong reason for consumption
- 86.84% would very likely continue to consume organic products and 76.97% for GAP products
- 52.63% however could not recognise relevant logos and marks





Conclusions & Recommendations



- Overall, consumers in Cambodia indicated positive responses towards healthy/safe food products, but limited awareness/knowledge
- ➔ There is a clear **need to raise consumers awareness** on food safety issues.
- Possible **topics**:
 - The benefits of safe/healthy food products
 - The harms that may be caused by unsafe/unhealthy food products
 - The guarantee system for safe/healthy food products (standards and technical regulations, product labels, marks and logos, verification methods and agents)
 - The possible and trustworthy source of information



Possible means and channels

- Seminars, workshops by local NGOs/consumer organisations
- Reader-friendly publications (leaflets and brochures) for consumers
- 'Safe food' campaigns
- Social media, website, blogs and wikis on organic and GAP products//brands
- Radio talkshows
- Television programmes
- Etc





In the longer run

- Adopt a Law on Consumer Protection
- Establish a Consumer Organisation
- Well-targeted incentives for organic/GAP producers
- Organic/GAP trade fairs for promotional purpose
- New tools, such as mobile apps, for checking the availability, prices and locations of organic/GAP products

Food, health
and nutrition
is worth
talking about.

