

The Study  
On  
Economic Policy Support  
In  
Kingdom of Cambodia

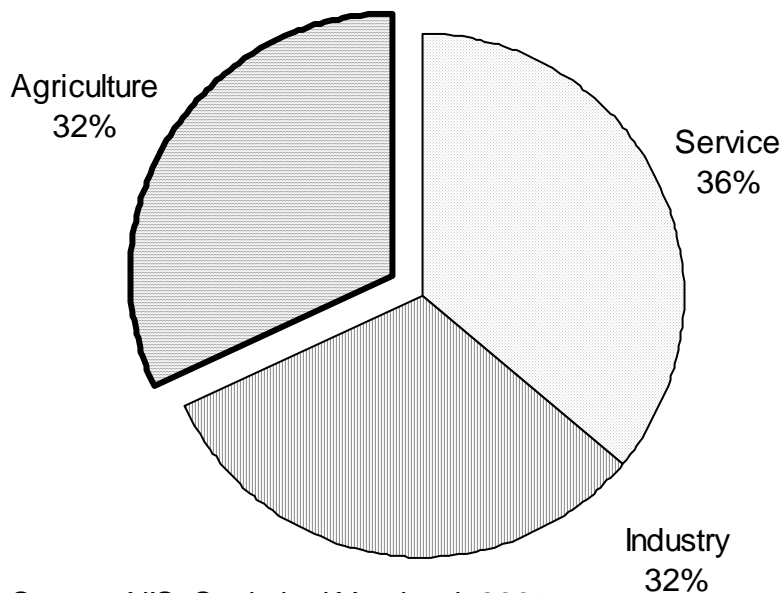
Agriculture & Fishery Related Industries

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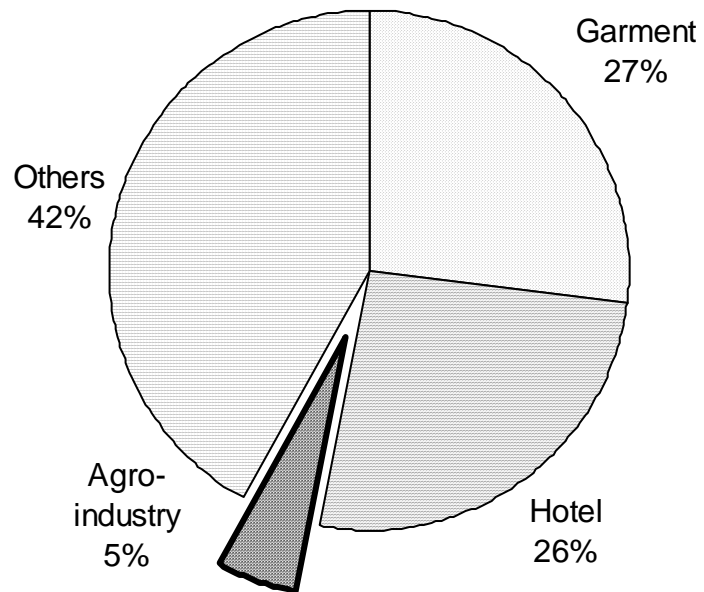
# 1. Overview (Agriculture in the Cambodian Economy)

## 1) GDP by Sector (2004)



Source: NIS, Statistical Yearbook 2005

## 2) Investment by Sector (2000-04)



Source: EIC (compiled from CIB, CDC)

## 2. Major Products

### 1) Agricultural Production (comparison with neighboring countries)

	Cultivated Area 2003 (million ha)	Rice Prod. 2004 (million ton)	Yield 2004 (ton/ha)	Fish Prod. 2001 (thousand ton)
Cambodia	5	4	2.0	413
Vietnam	10	36	4.8	2,010
Laos	2	3	3.3	80
Myanmar	11	22	3.7	1,288
Thailand	18	24	2.6	3,606

Source: FAOSTAT

### 2) Food Processing Industry

- (1) Beverage (Beer 2 companies, Wine 2 companies, etc.)
- (2) Precooked Chinese noodles (1 company)
- (3) Frozen fish (3 companies)
- (4) Tapioca (1 company)
- (5) Others (Ice cream, Flour, Rice mill, etc.)

### 3. Key Issues

- 1) A top priority for J-FDI candidates is to ensure stable supply of materials of uniform quality
- 2) Constraints which hinder the smooth supply of materials:
  - (1) Cooperative system in the form of union of farmers and fishermen is still under development
  - (2) Few farmers have know-how/skills and incentives on pest control, fertilizer application and quality improvement
  - (3) A lack of food evaluation criteria and inspection agency
  - (4) A lack of low-temperature storage facility, cold storage or refrigerated warehouse, cold or refrigerated transport system
  - (5) Delayed improvement of irrigation system

## 4. A Case of J-FDI Business Plan

### Business Plan by A J-FDI Candidate Investing in Cambodia within Three Years

Case:

Seasonings (MSG)

(Import Substitution,  
Export):

\*Under Consideration

Business type & Schedule of production:

Phase 1: Production of tapioca and export  
within 3 to 5 years

Phase 2: Production of seasonings made  
of tapioca, and sell them in Cambodia  
within 5 to 10 years

Investment amount: Not yet decided

Economic effects: The project would have  
several effects: import substitution, job  
creation, and foreign currency earning