

Sourcing from Cambodia

MAIZE

Product & Supplier Brochure



Source: Freepik





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Cambodia at a Glance

Cambodia has enjoyed over two decades of economic and urban development, averaging an annual GDP growth rate of 6% between 2010 and 2021. After a small post-Covid slump, GDP has continued increasing, from USD 27.2 billion in 2021 to USD 29.6 billion in 2022. Growth forecasts are 5.5% and 6% for 2023 and 2024, respectively.

The country's population is 17 million and increasing, with a relatively young median age of 27. Cambodia's middle class is growing, as is the urbanization rate, currently estimated at 25.3%. The presence of a young, growing and increasingly urbanized middle class suggests Cambodian consumer demand and spending will continue to grow steadily in the future, as has been the case for over two decades. Cambodia's GDP per capita is estimated at USD 1,784.79 for 2022 with household consumption being equivalent to 65.2% of the GDP.

The Government of Cambodia has embraced free market principles and sees the opening of the country

to foreign investment as one of its priorities; it aims to bring the country to upper-middle-income status by 2030 and high-middle-income status by 2050. The Government has introduced various policy incentives to ease business engagement. One of them, called Qualified Investment Projects (QIPs), offers several benefits including tax holidays and duty exemptions on the import of construction materials.

Cambodia's international trade benefits from the country's favourable geographic location at the crossroads between Thailand and Vietnam – two major manufacturing economies and trading partners in the region. The recent signing of regional and bilateral free trade agreements (FTAs) is expected to strengthen Cambodia's connectivity with international markets. Examples of such agreements include the China-Cambodia FTA and the Regional Comprehensive Economic Partnership (RCEP). Although there is no bilateral FTA between Cambodia and the European Union yet, trade links are significant. After China and the USA, the

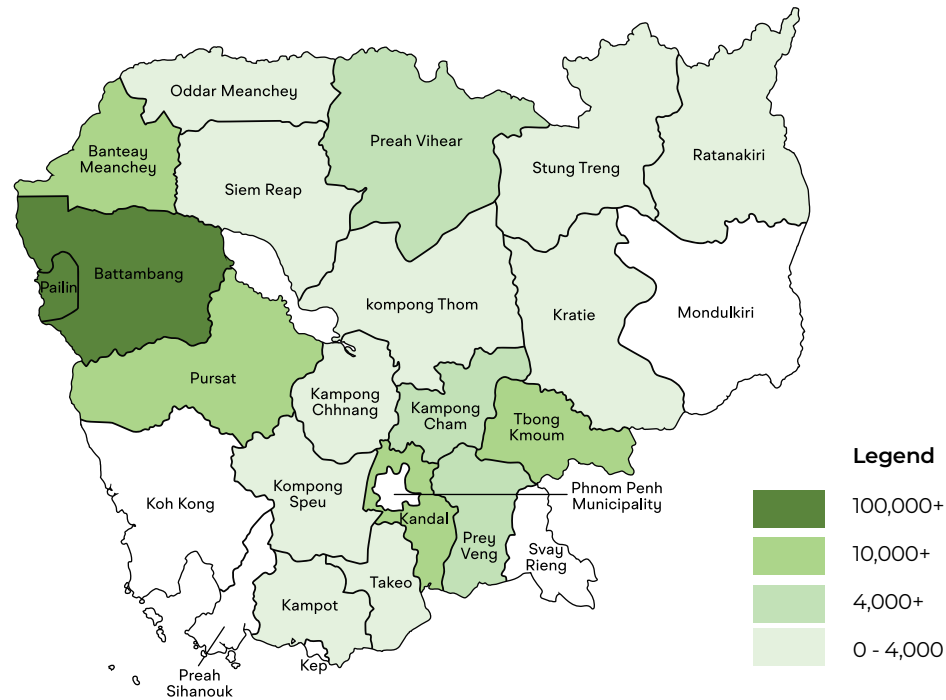
European Union (EU27) is Cambodia's third largest trade partner as of 2022 (followed by Vietnam and Thailand), with Germany being the top individual EU country.

Cambodia's trade performance has been very impressive in the last 10 years. The country's exports have grown by an average of 16% per year, while imports have grown by an average of 12% annually. This has led to a significant increase in the country's trade surplus: In 2022, Cambodia's exports totalled USD 16.3 billion, while imports totalled USD 12.7 billion, resulting in a USD 3.6

billion surplus. The garment industry is the country's single largest export sector, accounting for about 70% of total exports. However, there are also rising opportunities for the export of local agricultural products, such as rice and cashew nuts. Going forward, Cambodia's trade performance is expected to remain strong. Besides the country's traditional exports, the Government is working to diversify the country's export base, including new agricultural products.

Cambodia will continue developing as a sourcing destination of high-quality products for the international market.

Cambodian maize production (in tons), by region



Cambodia Factsheet

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Currency

Riel (KHR): 1 USD \approx 4,100 KHR. Dollarised economy (83%)

GDP

USD 28.3 billion (2022)

GDP growth rate

5.3% (2022)

GDP per capita

USD 1,771 (2022)

Official language

Khmer, English widely used

Capital city

Phnom Penh

Major cities

Siem Reap, Sihanoukville, Battambang

Government type

Constitutional Monarchy

Head of State

His Majesty King Norodom Sihamoni

Population

17 million (2023), annual growth 1.08 %, <27 years old: 50%

Economy

Garments, Tourism, Construction, Agriculture

Climate

Wet season: May to October

Dry season: November to April, average temperature: 27°C

Major religion

Buddhism (95%)



Source: LoveinMyBelly



Source: Freepik

INTRODUCTION

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Maize, scientifically known as *Zea Mays*, is a member of the grass family, Poaceae. Commonly referred to as corn, it is a versatile tropical grass that exhibits remarkable adaptability to a wide range of climates. This adaptability allows for varying maturation periods, spanning from 70 to 210 days. In the context of Cambodia, maize has found extensive adaptation in upland areas characterized by higher rainfall and suitable soil conditions.

Maize production increased rapidly in Cambodia during the 1950s, becoming the third most important crop in the country after rice and rubber at the time. However, due to the Khmer Rouge, maize production declined sharply in

1975. It began to recover in the 1980s, and by the 1990s, maize had regained its importance as a crop. The annual production of maize in 2019 was close to 350,000 tons.

Maize plants are distinguished by their height, which can reach up to 3 meters. Unlike some other crops, it has limited tillering capacity, which means it produces relatively few lateral shoots. This growth pattern focuses the plant's energy on the primary stalk and the development of the ears, where the corn kernels are formed. The primary maize production region in Cambodia is Battambang province. However, it is also cultivated in Kampong Cham, Kampot, Kandal, Banteay Meanchey, and Takeo



provinces. Red maize, also known as yellow maize, is the predominant local variety of this cash crop and is primarily grown for the stockfeed market. On the other hand, white (or waxy) maize is cultivated locally for human consumption on a smaller scale, with a history as a dominant Cambodian crop that dates back to the 17th century. Today, the cob is often roasted or boiled and enjoyed as a popular street food snack in Cambodia, commonly seasoned with salt and sometimes served with coconut milk. High starch content makes it ideal for a variety of additional dishes, such as maize soup and maize fritters. It is also used to make a variety of products, including corn oil, corn meal, and corn starch.

Red maize in particular has been identified as having significant growth potential in terms of production and profitability for Cambodian farmers. As one of the world's most important cereal crops following rice and wheat, it is poised for continued growth in exports due to the rising global demand for stockfeed. In order to reach its full potential in Cambodia, some challenges will need to be addressed, such as the need for improved irrigation and the need to reduce post-harvest losses.

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Varieties

Cambodian maize is well-known for its good quality and adaptability. It is high in carbohydrates, fiber, and vitamins and may be utilised in a number of cuisines. The main varieties grown in Cambodia are red, white, and violet maize.



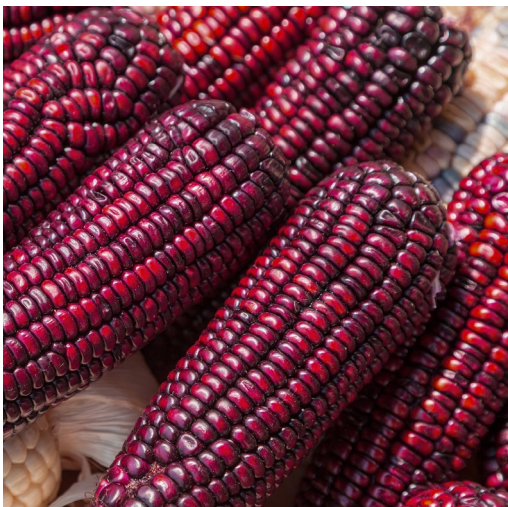
Red Maize

Red maize, also known as yellow maize, is the most common type of maize grown in Cambodia. It is primarily grown for livestock feed due to its high energy and protein content and supports growth and overall health in animals such as poultry, pigs, and cattle. The digestibility of red maize allows efficient nutrient utilization, while its starch content provides energy for metabolic processes. Cultivating red maize offers benefits for both livestock farmers and the agricultural industry, providing an alternative feed source, promoting diet diversification, and offering adaptability to different regions.



White Maize

White maize, also known as waxy maize, is less commonly grown in Cambodia than red maize. It is characterized by its light-coloured kernels. Unlike red maize, white maize contains the starch type amylopectin, which gives it a unique waxy texture and appearance. White maize is primarily cultivated for human consumption and is a staple food in many regions around the world. It is commonly used in various culinary applications, including the production of maize flour, corn meal, and corn starch.



Purple Maize

Purple maize, also known as blue maize, is a distinct variety of maize characterized by its deep purple or blue-coloured kernels. It is cultivated for both culinary and ornamental purposes. In culinary applications, the vibrant hue of violet maize adds visual appeal to dishes, making it popular for decorative purposes, such as in salads, desserts, and specialty corn meal products. It can also be used to make colourful tortillas, chips, and other maize-based foods.

Beyond its aesthetic appeal, violet maize offers potential health benefits due to its high anthocyanin content. Anthocyanins are pigments that give purple maize its unique colour and are known for their antioxidant and anti-inflammatory properties. They may contribute to promoting overall health and reducing the risk of certain chronic diseases.

Production

According to the latest available statistics, i.e. the 2019 Cambodia Inter-Censal Agriculture Survey, regional production of maize in Cambodia is as follows:

Province	Production (thousand tons)
Battambang	185.7
Banteay Meanchey	43.3
Pailin	27.5
Pursat	22.7
Kandal	18
Tboung Khmum	13.7
Prey Veng	8.4
Preah Vihear	6.4
Kampong Cham	6.3
Kampong Chhnang	3.1
Kampot	3
Ratanakiri	2.5
Kratie	2.2
Takeo	1
Siem Reap	0.9
Kampong Thom	0.7
Kampong Speu	0.3
Oddar Meanchey	0.1
Stung Treng	0.04
Total	345.8

In that year, maize was grown on just over 99,000 hectares in Cambodia, with an average yield of about 4.8 tons per hectare and a total harvest of ca. 346,000 tons. Plantations are spread across the country, but the Northwest and Southeast regions concentrate most of the production. These regions enjoy adequate moisture, fertile soil, and perhaps more importantly, have direct access to neighbouring Thailand and Vietnam, making them very suitable to grow the crop. Enjoying a tropical climate all year round, Cambodian producers are able to harvest maize twice a year.

The province of Battambang was by far the largest maize cultivation area in 2019, with a production of 185,743 tons. It was followed by Banteay Meanchey with 43,373 tons, Pailin with 27,567 tons, Pursat with 22,786 tons, Kandal with 18,053 tons, and Tboung Khmum with 13,734 tons.

The Cambodian maize value chain is essentially oriented towards the domestic market and its animal feed industry, which provides feed to the pig, poultry, and cattle value chains, among others. As such, red maize is by far the most cultivated variety in Cambodia. It is processed locally into animal feed through several steps, beginning with the harvest upon maturity at varying yields, depending on the region and growing conditions. The harvested maize is subsequently dried to reduce its moisture content to prevent spoilage and improve storage life. Animal feed is then created by grounding the dried crop into a fine powder, which is ready for sale and distribution to animal feed markets after proper packaging, mostly in the form of bags.



Regulations

The Ministry of Agriculture, Forestry, and Fisheries (MAFF) developed the National Policy for Agricultural Development 2022-2030. The policy provides direction for the relevant ministries and institutions of the Royal Government of Cambodia, but also for development partners and the private sector to jointly develop the agriculture sector. It outlines four main areas: 1) modernization and commercialization of the agricultural value chain, 2) public and private investments in the agriculture sector, 3) sustainable growth and resilience to climate change, and 4) institutional reform and cross-cutting issues.

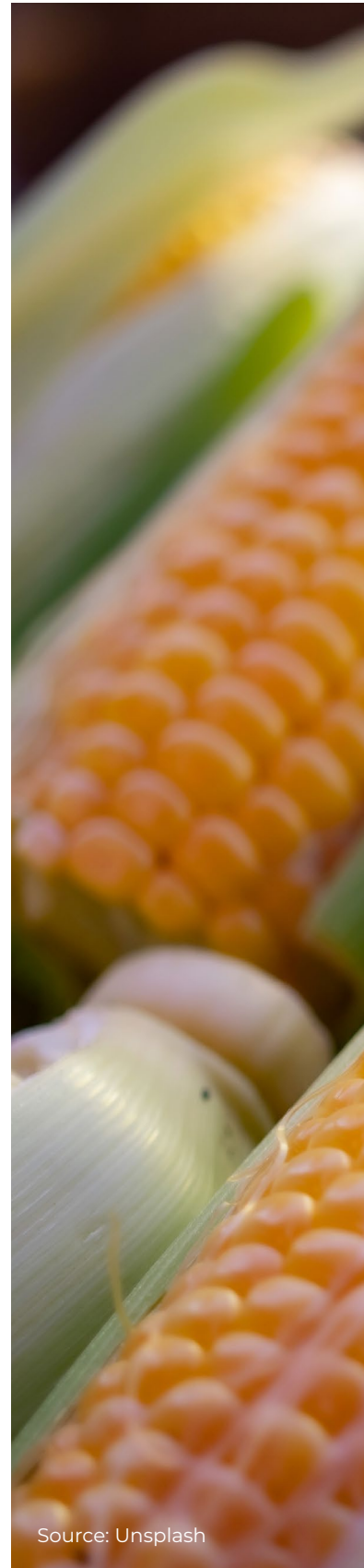
While no government strategies are currently aimed exclusively at the maize agriculture industry, the above National Policy lists maize as one of the priority crops targeted for increased productivity.

MAFF has also been an active promoter of maize exports to the world. The Ministry negotiated the shipment of Cambodian maize to China in 2022, making it the country's second agricultural product to be permitted for direct export to China that year. Currently, other products that are allowed for direct export to China include rice, cassava, cashew nuts, bananas, and mangoes. As the industry expands and exports increase, the Cambodian government will push for more subsidies, technical assistance, research, and market promotion in order to export globally.

Development Cooperation

There is currently very little aid and development cooperation in the maize sector in Cambodia. However, there is research support to map out Cambodia's maize export potential. The Korea Programme for International Cooperation in Agricultural Technology (KOPIA) is currently supporting research on a new, higher-yielding Cambodian hybrid red maize variety called CHM02, which is intended to meet export demand and support domestic feed producers.

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Source: Unsplash



International Trade

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There are several Harmonized System (HS) codes categorizing maize products for international trade. For simplicity and relevance, this chapter is focusing on unprocessed maize (HS code 1005), which is the most commonly traded maize product in Cambodia.

Exports

With most Cambodian maize production targeting the domestic market, maize export volumes are relatively low. In fact, they slightly decreased by 23% from 1,485 tons in 2018 to 1,136 tons in 2022. However, this did not negatively impact export value which slightly rose from USD 0.4 million to USD 0.5 million over the same period. The top export destination for Cambodian maize is by far Taiwan, which accounted for over 85% of total exports in 2022 (USD 0.43 million), followed by South Korea (USD 0.06 million) and China (USD 0.01 million).

Imports

Cambodia's maize imports have been increasing rapidly to meet domestic demand and currently surpass exports by a staggering factor of 118. Import volumes increased by 59% from 84,552 tons in 2018 to 134,747 tons in 2022, valued at USD 51.9 million. Cambodia's main supplier by far is Argentina, accounting for 56% (USD 29.1 million) of total imports in 2022. It is followed by Brazil (USD 7.1 million), Vietnam (USD 6 million), Thailand (USD 5.9 million) and South Africa (USD 3.4 million).



Source: Freepik

Certifications

With food safety being a high priority for most buyers, certifications play a major role in testifying to adequate product quality. Maize requires a phytosanitary certificate for both food and feed applications. All European food business operators (both processors and restaurants) are legally required to have a food safety management system based on the principles of Hazard Analysis and Critical Control Points (HACCP). Food safety management systems and certifications recognized by the Global Food Safety Initiative (GFSI) are widely acknowledged throughout Europe. The following are the most important certifications:

GLOBALG.A.P.

Farm standard for good agricultural practices, covering the process from farm input to a non-processed product.

ISO 22000

Food safety management system certification standard that provides a framework for managing food safety risks. It is an internationally recognized standard that can be applied to any organization in the food chain, from farm to fork.

FSSC 22000

Food safety management system certification scheme that provides a rigorous system to manage food safety risks and is recognized by the Global Food Safety Initiative (GFSI). It is an internationally accepted certification scheme based on a combination of ISO 22000, sector-specific prerequisite programs, and technical specifications.

BRC Global Standard (BRCS) for Food Safety

Technical standard for food safety, consumer products, packaging, storing and distribution, which is a widely accepted standard in Europe.

IFS International Featured Standards

A set of safety standards for Manufacturers, wholesalers, distributors, agents and brokers, including the IFS Food Standard, among others.

GMP+

International standard for feed safety and responsibility throughout the supply chain for animal feed.

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Company Profiles

The following section features selected Maize companies.

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Source: Freepik



MAIN PRODUCT

AS Corn Hybrid

AGROTECH VITA CO., LTD

Agrotech Vita Co., Ltd. is a Cambodian company that imports and distributes fertilizers, seeds, and agrochemicals in Cambodia. The company distributes high-quality agrochemical products such as herbicides, insecticides, fungicides, and foliar fertilizers from multinational companies. Agrotech Vita Co., Ltd. is also the leading company to distribute AS Corn Hybrid products for corn farmers in Cambodia. The company provides technical support and education to farmers to help them optimize their yield potential. Agrotech Vita Co., Ltd. is a part of the Dynamic Group, which supports various industries in Cambodia, including healthcare, agriculture, quality control, and construction.

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CONTACT

<https://www.dynamic.com.kh/solutions/agrotech-vita> | info@agrotechvita.com

+855 (0) 023 425 995 / +855 (0) 88 567 8912

No. S01-S02, National Road 2, Phnom Penh 120601, Cambodia



MAIN PRODUCTS

Corn

Cassava

Dried Tapioca Chips

HANG HARVEST AGRICULTURE CO.,LTD

Hang Harvest Agriculture Co., Ltd is a company based in the northern province of Oddar Meanchey. Agriculture lies at the core of Hang Harvest's operations, tracing its roots back 13 years to a humble family business focused on tapioca chip production. Over time, it has evolved into a thriving agricultural industrial firm. Notably, the company recently expanded its scope to include the export of agricultural products, including corn. In a significant development for 2023, Hang Harvest initiated a project to construct warehouses dedicated to tapioca chips and a loading port. In addition to these ventures, the company operates a flourishing agricultural warehouse business, providing storage facilities for raw materials in support of both public and private projects.

CONTACT

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 Sangkat Krang Thnong, Khan Sen Sok, Phnom Penh Capital, Cambodia



AGRI-MASTER CO., LTD

Founded in 2004 as part of the Medivet Group, Agri-Master Co., Ltd has established itself as a leading animal feed and nutrition company in Cambodia, dedicated to enhancing the health and performance of farmers, distributors, and communities nationwide. Agrimaster specializes in producing a diverse range of high-quality animal feed for swine, chickens, laying ducks, and quail. In 2013, Agrimaster made a significant investment in a state-of-the-art animal feed factory located 30km outside of Phnom Penh. This cutting-edge facility is equipped with modern amenities and has the capacity to meet the growing demand for feed from farmers and distributors throughout Cambodia.

Agrimaster takes pride in its highly trained and experienced team of veterinarians who provide invaluable technical support to farms and communities in both rural and urban areas of Cambodia. Collaborating closely with farmers, distributors, and local communities, Agrimaster is committed to enabling local farmers and businesses to reach their full potential and flourish.



MAIN PRODUCTS

Pellet feed and finished feed for pig

Finished feed for sows lactation

Pellet feed and finished feed for laying duck

Crumble feed for chicken

Finished feed for quail

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CONTACT

<http://medivetgroup.com.kh/> | +855 12 969 671 / +855 12 535 370 | medivet@online.com.kh

323 Northbridge Boulevard Teukthal, 323 Northbridge St. (1019), Phnom Penh



THE FIRST-GATE GLOBAL INVESTMENT CO., LTD.

The First-Gate Global Investment Co., Ltd. is an esteemed import/export company specializing in premium agricultural products. Since its establishment in 2015, the company has built a strong reputation in local and international markets, catering to customers worldwide. Their expertise spans various sectors, including industrial raw materials, machinery, natural resources, real estate, construction, management services, and agricultural products. In the agricultural segment, they are actively involved in manufacturing, processing, and exporting a wide range of food products. The company is committed to maintaining the highest quality standards, ensuring that their products consistently meet excellence. Leveraging their expertise and resources, they contribute to the global growth and success of the agricultural industry.

MAIN PRODUCTS

Maize
Rice
Beans, including Soybeans and cocoa beans
Cassava
Cashews Nuts
Wheat
Grains
Palm Products
Sesame
Groundnuts
Gum Arabic
Kolanut
Sorghum
Moringa
Black Pepper
Yams

CONTACT

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Other Contacts

SECTOR STAKEHOLDERS

Cambodian Ministry of Agriculture, Forestry and Fisheries, Department of Agro-Industry

<https://web.maff.gov.kh/?lang=en>

Cambodia Chamber of Commerce

<https://www.ccc.org.kh/>

Cambodia Development Resource Institute

<https://cdri.org.kh/>

Cambodia Farmer Federation Association of Agricultural Producers

<https://cfap-cambodia.org/>

Cambodian Federation of Employers and Business Associations

<https://www.camfeba.com/>

Cambodia Partnership for Sustainable Agriculture

<https://cpsa-growasia.org/en/>

Cambodian Ministry of Commerce

<http://www.moc.gov.kh>

European Chamber of Commerce in Cambodia (EuroCham)

<https://www.eurocham-cambodia.org/>

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