



*Empowered lives.  
Resilient nations.*

23<sup>rd</sup> SSC-MoC  
CEDEP II- Cassava  
17 November 2015

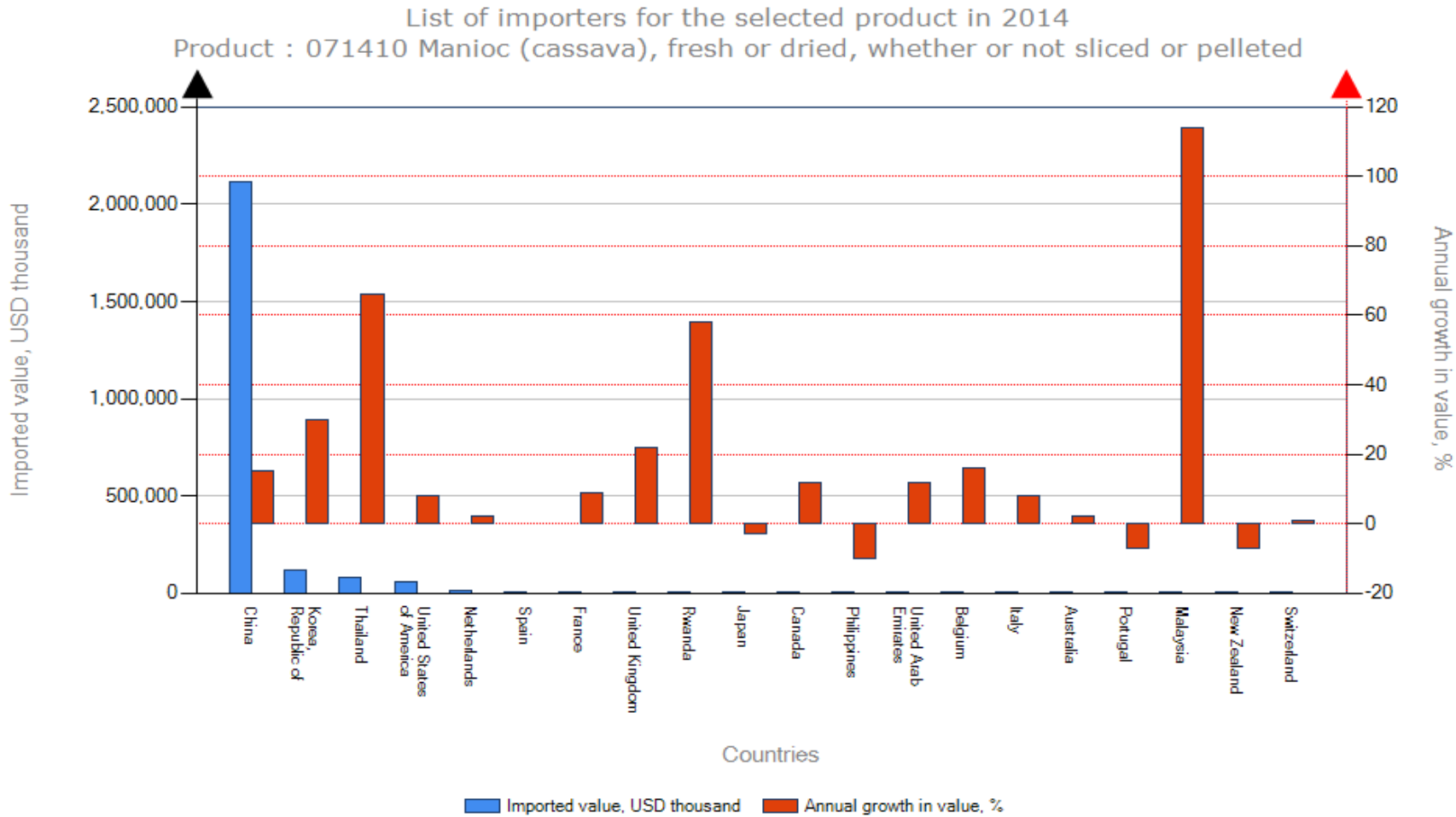


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# 1).Cassava market overview

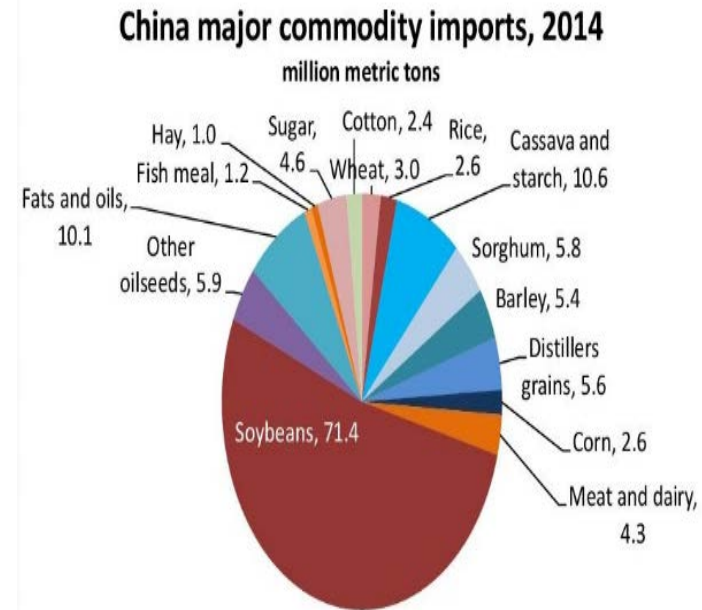


Importers	2013	2014
	Imported quantity, Tons	Imported quantity, Tons
World	8,869,033	10,000,695
China	7,388,280	8,650,528
Thailand	472,876	649,875
South Korea	577,440	516,785
USA	93,388	68,078
Rwanda	29,936	20,420
Japan	28,687	13,959
Philippines	16,163	10,439
Burundi	6,063	9,717
Netherlands	10,647	8,996
Spain	7,091	7,548
Brazil	11,263	6,079
France	4,678	4,709
United Arab	2,558	4,546
United Kingdom	3,458	4,303
Canada	4,085	3,660
El Salvador	2,194	2,368
Belgium	1,866	2,086
Italy	1,737	1,815
Australia	1,835	1,535
New Zealand	1,059	1,465
Democra-Congo	1,298	1,260
Singapore	1,416	1,213
Oman	735	1,066
Malaysia	106	948

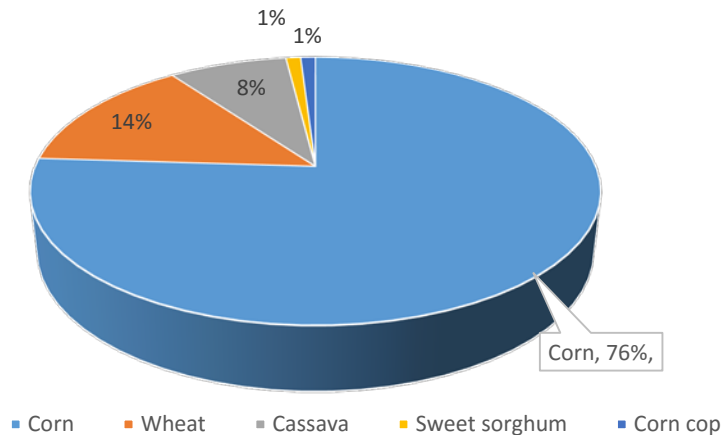


# Why corn is a matter of cassava- in China

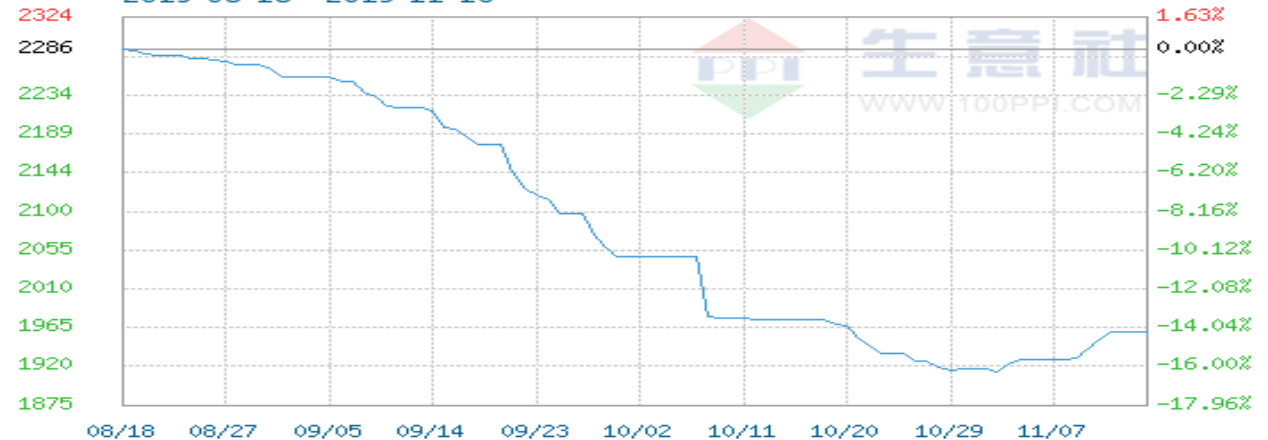
China corn (MY2015/16 for2cast)	Unit (MMT)
Corn stock	96
Corn production	230
Consumption	221
<b>Corn surplus</b>	<b>9</b>
Gain report: CH15020, June 2015	



Crops used for ethanol production in China (2014), GAIN Report 2015



**Corn**  
2015-08-18 - 2015-11-16



# Recent situation

- Time of cassava harvesting is a bit change due to:
  - Late coming of rain and replanting of cassava
- Increase of production cost because of replanting two or three times
- Thai government slapped a ban on transshipment of cassava for the fear that it may affect domestic price stability and hurt its farmer (Bangkok Post, 30 October 2015)
- Chinese Government is releasing its aging corn stock unfit for human and animal consumption
  - Fuel ethanol is only to consume a large inventory of corn stock
- Both Thailand and Vietnam are still buying cassava as normal but the price is lower than last year.

## 2). Update of the project progress ( 2015)

- Value chain study back on track
  - The International consultant and local firm are drafting the report ( it expects to be completed by December 2015)
- Eight local cassava associations were established in the project target areas
  - Workshop on roles and functions of Cassava Business Association (28/10/2015- 60 participants)
  - Workshop on contract farming and its application in cassava production & export (06/11/2015-90 participants)
- Retreat of CCP II (China Cambodia UNDP Trilateral Cooperation Cassava Project- funded by China/focus on cassava production)-26/10/2015
  - Common understanding on cassava throughout the whole cycle since farm to factory
  - Priority of supporting areas (contract farming, seed centers, transportation cost, trade facilitation, quality control, market intelligence mechanisms → cassava export policy)

# Cont.

- In cooperation with the DPSD of MoC, assisted Sampovlun Cassava Association to call for the improvement of the facilitation of cross border check point- the meeting was held on 28/10/2015
  - Deputy Provincial Governor supported the request and will assist to organize a meeting with all relevant stakeholders at the check point (Phnom Dei)
- In the Cooperation with DPSD and DICO of MoC, organized a meeting to develop a contract farming between BAI and Cassava associations: the contract is drafting
  - Operate year round including off-season & export of semi-processed product
  - Reduce the over-supply of cassava during harvesting period & get better price



# Other activities:

- Three Field Coordinators are recruiting to be based at each target project provinces (expect to be onboard by December 2015)
- The third project board meeting was held on 07/10/2015
- Worked with EIF Communication consultant to upload project documents (knowledge products) in the Trade SWAp Website
- Facilitated the M&E mission of DICO to project target areas (31/08/2015)

### 3) Urgent meeting with all players in cassava value chains:

- To find out proactive strategies to address the negative impacts causing from the dropdown of cassava price
- To find out strategies to diversify markets for cassava based products which can be accessed during this year to fulfill the demand gap of current markets which Cambodia are trading with

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