



Cambodian Export Diversification and Expansion Program (CEDEP) I: High Value Silk Component

End-of-project Company Survey Report

September 2015

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Introduction

Cambodia's recent WTO Trade Policy Review recognized the role of international trade as the driving force behind much of the country's economic growth and achievements in poverty reduction. While Cambodia strives to deepen its integration into the world trading system, the diversification of export products and markets remain a high priority. Trade diversification will accelerate economic and social development in Cambodia and will help reduce the country's exposure to negative trade shocks.

ITC has been supporting the Cambodian silk sector since 2005. The assistance took off with the preparation of a sector strategy whose priorities were subsequently addressed through the implementation of the Sector-wide Silk Project Phase I and II. The second project phase was completed in March 2012 and brought about significant results in terms of strengthened weaver communities and silk companies that became export ready or started successfully tapping the potential of foreign markets.

The assistance to the silk sector requested by the Government under the new EIF project aims to build on these results with the objective to enhance the competitiveness of the sector and to increase exports of high value silk products with a beneficial impact on poverty reduction and employment, particularly among women. 14 silk companies have been identified as beneficiaries and invited to participate in current project (2012-2015) in order to improve the performance and increase both local and international markets linking with local weavers for better employment, sales and skills.

The project delivered significant results for beneficiary companies, workers and weavers. The permanent employment for 14 beneficiary companies increased from 352 in 2012 to 400 in 2014 and is expected to reach 446 in 2015, of which 75% are women. Likewise, numbers of weavers who are contracted by beneficiary companies increased from 273 in 2012 to 441 in 2014 and it is expected to reach 568 in 2015. Over 95% of contracted weavers are women.

Total sales of 14 beneficiary companies increased from USD 1,363,869 in 2012 to USD 1,626,810 in 2014 and it is projected to reach USD 1,893,684 in 2015. Furthermore, average profit margin of 14 beneficiary companies increased from 46% in 2012 to 49% in 2014, and it is expected to reach 58% in 2015, thanks to the increased export sales and improvement in productivities.

Average export sales for each companies increased from USD 30,733 in 2012 to USD 43,321 in 2014, and it is expected to reach USD 55,227 in 2015. Estimated sales to tourists also increased from average of USD 18,640 per company in 2012 to USD 33,905 in 2014, and it is projected to reach USD 40,551 in 2015.

Beneficiary companies exported to average of 3.78 international markets in 2012, while it expanded to 7.1 international markets by May 2015. In addition, each company exported average of 5.7 silk products to various export markets, while it was only 4.3 silk products in 2012.

14 beneficiary companies have 96 direct sales outlets by May 2015, increasing from 56 direct sales outlets in 2012. In addition, each company uses average of 9.5 marketing tools while they use only 3 marketing tools in 2012.

Methodology

Sample Survey Design and Implementation

The end-line survey for silk companies was carried out by collecting data on structure and performance from all silk companies supported by ITC project. The objective of the survey is to establish end-line against baseline data to measure the progress in key performance indicators.

Scope and Sample Selection

The assessment is conducted against 14 silk companies supported by ITC project, who are direct beneficiaries of the project. A survey questionnaire was developed to measure the project results (outcome and impact) archived against baseline data and targets. The number of sample represents 100 percent of total surveyed (14 silk companies). The survey was conducted through face to face interviews from April to June 2015.

Data Collection and Quality

The survey collected qualitative and quantitative data through the questionnaires. The questionnaires had 8 sections: Company's General Information, Employment, Company's Economic Background, Export Diversification, Business Expansion, Product Development, Raw Materials, and Technical Assistance.

The questionnaire was sent to each company prior to the interview, so that companies were able to prepare the document and relevant information. There were several companies whose questionnaires were not completed during the interview, thus required follow-up to obtain completed questionnaires. During the data entry and cleaning, some companies were contacted to clarify some data before processing and analyzing them. The data was collected during April to June 2015.

Limitations to the Survey

Quality of data relies on the quality of information provided by companies. The consultant tried his best to verify the data during and after interviews to ensure the accuracy of data as much as possible. Several companies have proper records of business and financial information, but some of them didn't. Thus, some data are based on the estimations of the companies.

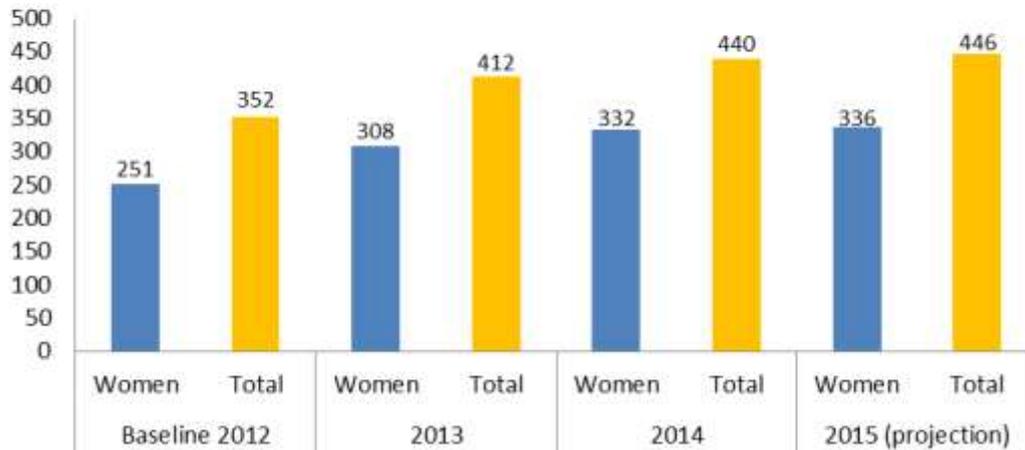
Employments

According to the figure 3.1, the total number of employment (permanent staffs and workers) created by 14 silk companies supported by ITC have increased significantly by 25%, from 352 employees (of which 251 are women) in 2012 to 440 employees (of which 332 are women) in 2014. It is expected that total employment of 14 companies will reach at least 446 employees (336 women) in 2015. At the same time, several companies decided to contract more weavers instead of increasing number of employees to meet the increasing demand.

Employments created by silk companies offer large opportunities for women, since 75% of total employees are women in 2014 and 2015.

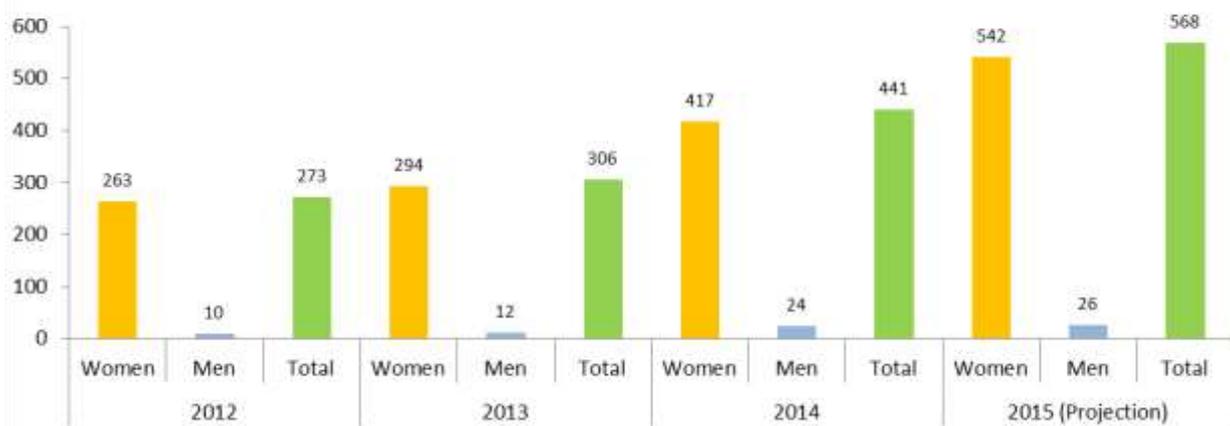
Almost all silk companies employ disabled or vulnerable women, while others aim to provide jobs to women to prevent them from being victims of trafficking or abuse.

Figure 3.1: Evolution of Employment created by 14 Silk Companies



According to Figure 3.2, weavers, excluding permanent workers, who have been sub-contracted by silk companies have significantly increased from 273 in 2012 to 441 in 2014 and continue to grow in 2015 to 568. About 95% of contracted weavers are women.

Figure 3.2: Evolution of Contracted Weavers by 14 Silk Companies

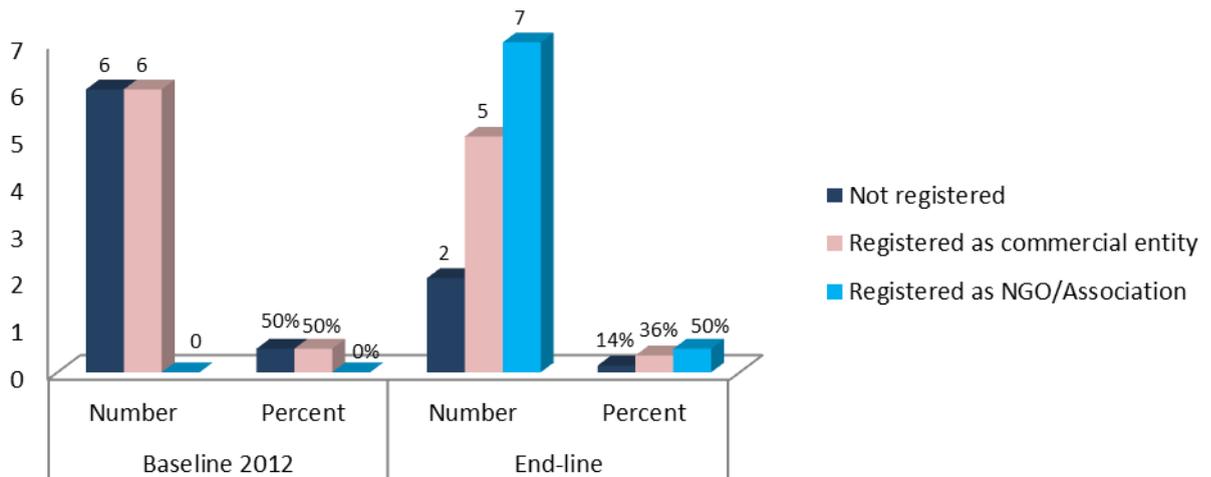


Company Status

In 2012, half of 12 surveyed companies were registered as commercial entity while half of them were not registered neither as commercial entity or NGO/Association. However, by April 2015, 12 companies were registered as commercial entity or NGOs, while only two companies were not registered.

Among two companies, one company is currently going through registration process, and another company is an affiliate of the registered company.

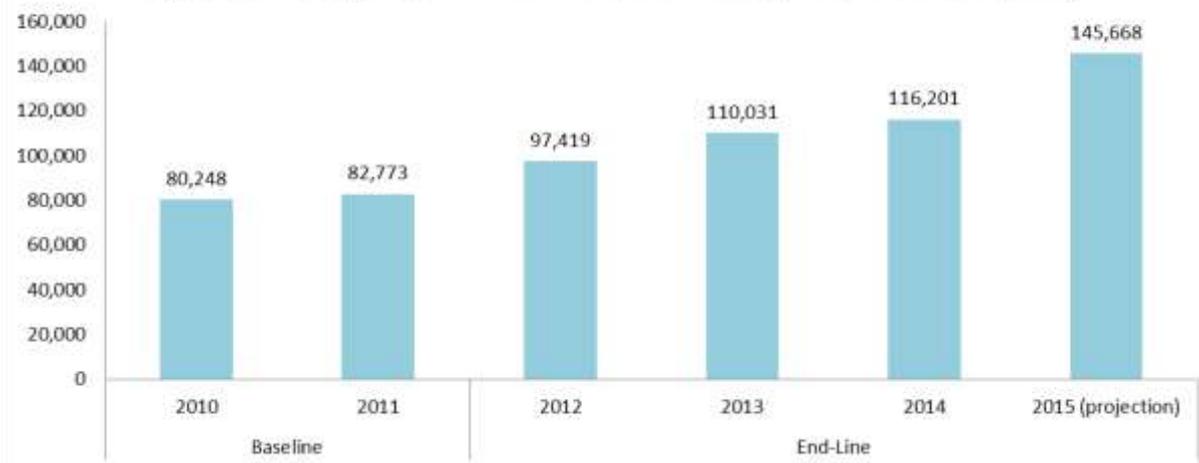
Figure 4: Registration of Silk Companies



Total Annual Sales

The average annual total sales (silk and non-silk products) of companies increased from USD97,419 in 2012 to USD116,201 in 2014. It is projected that the average total annual sales will reach USD 145,668 by the end of 2015. The increase of sales is due to the growing sales of both silk and non-silk products in local and export markets.

Figure 5: Average Annual Total Sales Per Company 2010-2015 (USD)



Profit Margin

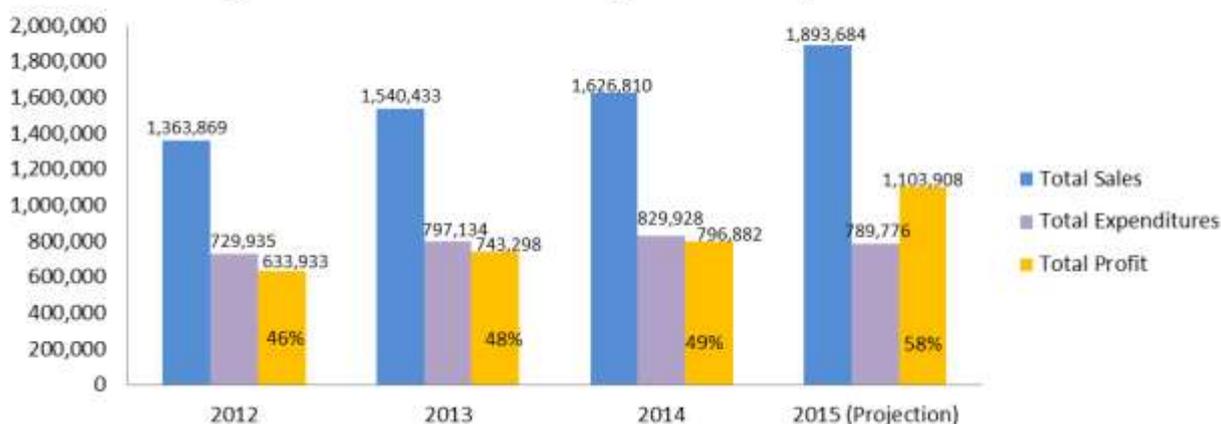
Total profits of 14 silk companies have grown gradually from 633,933 USD in 2012 to 796,882 USD in 2014. It is expected to reach USD 1,103,908 in 2015.

The profit margin of total sales of 14 companies was 46% in 2012 and increased to 49% in 2014 and 58% in 2015. Increase of export sales did not significantly increase existing operating costs, while growth of export sales and increased productivities contributed to the increase of profit margins. Several companies also benefited from better cost management such as contracting more weavers

and pay by pieces. Improvement of staff productivities such as adopting good practices of assembly production line also contributed to the increase of productivities.

The high growth in profit margin in 2015 was also driven by the expectation that exports in 2015 will grow significantly as several companies secured large volume of orders from both existing and new buyers. Relationships with some buyers were established during trade fairs which companies participated with support from ITC.

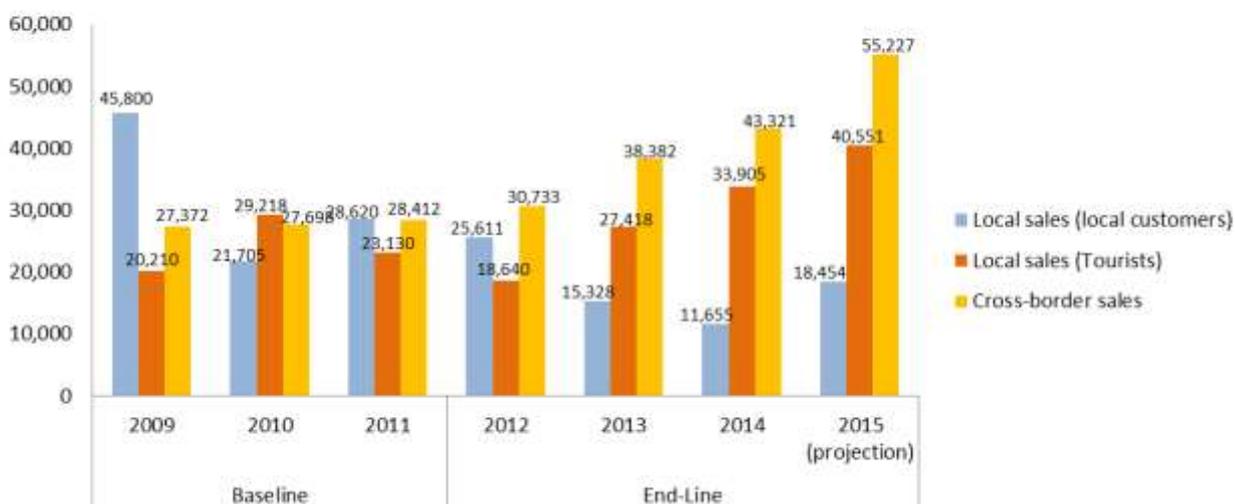
Figure 6: Evolution of Profit Margin of Silk Companies 2012-2015



Exports

Export of silk products by 14 companies grew by 41% during 2012-2014, and each company exported average of USD 43,321 in 2014. The growth in export resulted from acquisition of new clients and new export markets. Several companies also successfully increased the export sales from traditional markets such as France and the US. ITC supported companies on trade fair participations, export market research, development of brand identity, marketing tools, and export plans, as well as improvement in product design and quality management. Export sales in 2015 are expected to grow by 27%, based on the results from first four months and orders in pipelines from buyers.

Figure 7.1: Average Annual Sale of Silk Products by Market Segmentation Per Company

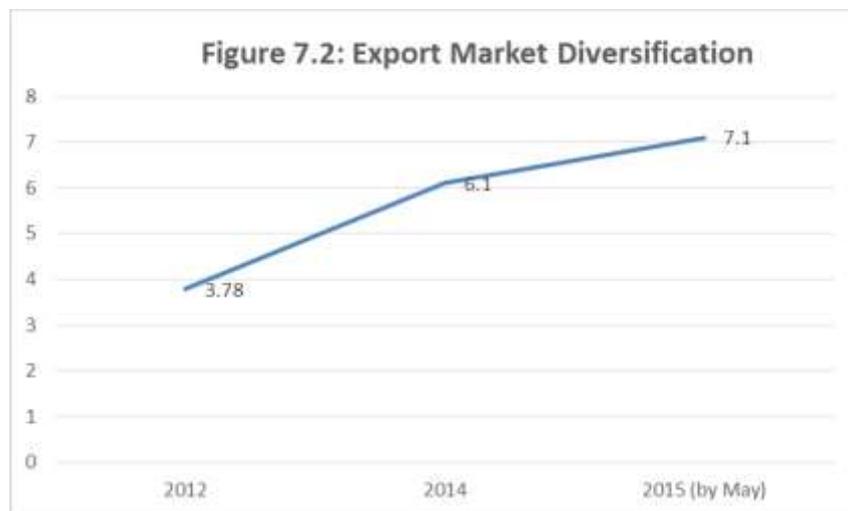


ITC assisted 13 companies to develop and implement export plan, the strategy documents to increase exports. One company developed and implemented export plan by itself. By May 2015, all 14 companies possess export plans and strategies, while only five companies have some forms of export plan in 2012 according to baseline survey.

The local sales which are combination of sales to Cambodian customers and foreign tourists slightly grew by 3% from USD 44,251 in 2012 to USD 45,560 in 2014. It is expected that local sales will reach USD 59,005 in 2015, based on projections of each company.

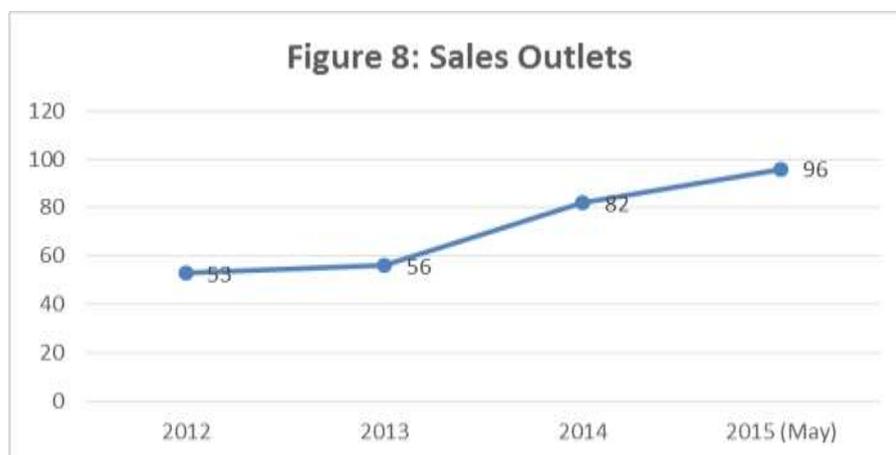
Unfortunately, most companies did not have separate record for the sales to tourists and local customers. However, companies estimated that sales to local customers represent small percentage, merely 5-10%, of total local sales. Thus, the breakdown sales between domestic and foreign tourists are based on the estimations of companies.

Each company exported to 7.1 export markets on average by May 2015, increased from 3.78 export market in 2012.



Sales Outlets

In addition to export market, ITC also provided coaching and advisory services to develop more sales channels for local market including those channels targeting tourists including showrooms, hotels, restaurants, airport and shops. All 14 companies increased sales channels and total number of sales channels increased from 53 in 2012 to 96 in May 2015. Increase of sales channels is due to the growing numbers of consignment stores. Several companies consign their products to other companies, as it is common practice to consign products among silk companies.



Product development and marketing tools

ITC supported 13 companies to develop new collections and products. By May 2014, 13 companies released 52 collections and 217 silk products.

In addition, each company exported average of 5.7 silk products to various export markets, while it was only 4.29 in 2012.

ITC also assisted 13 companies to develop sales and marketing materials such as catalogues, company profiles, brochures, brand books, color charts, price lists, leaflets, business cards and review of their websites. By May 2015, ITC assisted 13 companies to develop average of 9.5 marketing materials per company.

Case Studies

1. AFESIP Fair Fashion

AFESIP Fair Fashion (AFF) centre, a social enterprise, was established in 2003 in Kampong Cham province by AFESIP Cambodia as tailoring and weaving project to provide jobs to women who were victim of human trafficking and sex slavery and support their reintegration to the society and rehabilitation through vocational training. AFESIP Cambodia is a registered non-governmental, non-partisan, and non-religious organization that secures the rights of vulnerable women and girls. AFESIP Cambodia has been active in Cambodia since 1996.

In 2005, foreign buyers who appreciated AFF's strong social mandate showed interest in buying quality silk products from the centre. To obtain the export permit, AFF registered itself to the Ministry of Commerce as a company. AFF also set up a production centre and showroom in downtown Phnom Penh, and transferred almost half of its workers from AFF centre in Kampong Cham to Phnom Penh.

While AFF was generating incomes from local and export sales, the income was just enough to cover small portion of company's operating costs (around 20%-30% in early years) and the rest was covered by contributions from charity. Income from the sales covered about 60% of operating costs in 2012 and 2013, but the ratio improved to 81% in 2014 although income remained almost the same thanks to better cost management.

AFF joined the High Value Silk project implemented by ITC in late 2012. At that time, AFF was in financial trouble due to (i) significant decline of orders from traditional international buyers – two international buyers which represented about 80% of the company's export sales gradually decreased orders and completely stopped in 2013; (ii) the reduction in donors' supports due to global financial crisis in 2009-2010; (iii) high operating costs with doubling rental cost of the company's premises in Phnom Penh, which forced AFF to close the production centre and showroom in downtown and move to a relatively cheaper but remote location, outside of Phnom Penh city centre, which led to a reduction of local sales; and (iv) product offers not matching with the requirements of international markets.

Before joining the ITC project, AFF was principally focusing on creating jobs for women who are victims of human trafficking and had no plans to expand new markets. AFF was producing over 300 products with different designs and sizes to serve traditional international buyers and local market, but most products did not meet the requirements of new buyers. AFF was working with volunteers and students to design new products without testing or assessment of market needs. Prices of the products were not calculated properly, with retail price being the same as export and wholesale price, which was too expensive for exports.

AFF's participation in ITC project brought changes to the company's ways of operating and provided opportunities to address challenges it was facing before the beginning of the project.

During the project, AFF received training, mentoring and support to attend trade fairs in Germany and France, learning how to manage relationships with new buyers and understanding their requirements. ITC also helped the company in computing cubic meter shipments and in developing marketing materials such as leaflets, catalogues, colour charts, business cards and price lists. AFF also reviewed costing and pricing with ITC, which empowered them to come up with a competitive wholesale price. The company developed and promoted new product collections, reflecting AFF's identity and social mandate. AFF also developed an export plan for the first time with ITC advisory support, identifying target export markets and strategies to increase export sales and meet new clients. The export plan includes AFF's strategy to increase both export and local sales targeting tourists in the absence of a retail shop, by strengthening its network with local partners and working closely with other CEDEPI project beneficiary companies.

As a result of network building, AFF was able to distribute its products by consigning them to other companies. AFF also developed exclusive fashion jewellery collection for CEDEPI company with their brand identities, and offered its production capacities to produce them. Expanding its sales channels through consignment stores and promoting its products and services to local wholesalers enabled AFF to compensate the decline of local sales due to closure of its shop in Toul Tompoung, which was transferred to remote area in Veng Sreng, and enabled it to generate income for paying its staffs and workers.

AFF benefited greatly from ITC training on fashion trends, mentorship on product design, visits to high-end clients and developing its brand identity. The newly developed product collections reflect the requirements of new international buyers, local wholesalers and consignment partners. AFF also participated in various tour visits to weaver villages and to yarn suppliers in Vietnam.

AFF now exports to 9 countries, of which 5 countries were identified with support from ITC. It established two consignment channels and a partnership with one wholesaler in 2014 and numbers are expected to grow to six and five respectively in 2015.

In the first quarter of 2015, export sales was 53% of total sales while local sales was 26%. Sales volume for 2015 is projected to increase by 2.3 times for export and 7.8 times for local sales since 2014. To cope with increased order in 2015, AFF is planning to recruit six staffs mainly for production and also outsource part of the weaving to a group of 10 weavers, with whom AFF has built relationship during a study tour organized by ITC.

2. Color of Life

Color of Life, a women-owned business, was established in 2009 with assistance from Watthan Artisans Cambodia who works with marginalized and people with disabilities.

Before joining the ITC project, Color of Life already had well-established product collections, with a strong focus on lady's fashion, including hand-made woven scarves, colourful silk accessories such as bags and purses, as well as decoration goods and ornaments. It combined contemporary fashions and traditional weaving techniques. Color of Life sold its products domestically and to some export markets in small quantities.

Color of Life joined ITC project in 2012 and participated in various support activities including trade fairs in the US, Germany and Japan to explore potential buyers. ITC provided advisory supports to Color of Life on product development and improvement of marketing materials including price and packing lists, pro forma and commercial invoices, brand books, leaflets, catalogues that reflect the company's brand identity. Color of Life also benefitted from training on dyeing, development of the export plan, improving communication with buyers, as well as tour visits to weavers and silk yarn suppliers in Danang and Hanoi.

As a result, Color of Life developed more than hundred new products with clear brand identity, which attracted new buyers from the US and Europe. Export sales almost doubled from 2012 to 2014. Color of Life projects that annual export sales will grow by 150% in 2015, following the finalization of export deals with buyers from Italy, Switzerland, Australia and Germany, and some of its products have been sent to Japan. Color of Life has found a new showroom location in tourist areas in Phnom Penh, and benefitted from ITC support in its decoration and product arrangements. It is expected that local sales will also increase.

Inspired by ITC support on dyeing and visits to high-end clients, the company decided to set-up a dyeing centre in Phnom Penh. It also expanded the number of contracted weavers to 60-70 and is constructing a weaving centre in Takeo Province to accommodate increasing orders from international buyers. Color of Life also improved its management structure and plans to recruit more qualified staffs, especially in sales and production (weaving and dyeing) to handle new orders from international buyers.

3. Craft Village

Craft Village, a small women-owned enterprise, was established in 2009 with the objective to provide reliable and high quality Cambodian silk products and to offer sustainable incomes to Cambodian artisans. Craft Village joined ITC project in 2012 and has actively participated in the various trainings and events.

With ITC supports, Craft Village participated in several overseas trade fairs, where it established contacts with prospective buyers and subsequently received several orders. Craft Village received coaching training for understanding buyers' requirements such as contract terms, labelling, laboratory testing. It also received support in trade fair preparation, reviewing costing structure, development of its brand identity and marketing materials such as catalogue, colour chart, business cards and product tags. It also improved its export plan, packaging, raw materials sourcing, weaving and dyeing techniques, product quality management and design.

As a result, the company's annual sales grew by 57% between 2012 and 2014. Particularly, exports of silk products grew by 16% thanks to the establishing business relationship with new buyers from Austria, Laos, Singapore, Sweden and Vietnam.

While it only offered scarves prior to joining ITC project, Craft Village now has new silk products such as pillow covers, dresses and gift accessories (fashion jewelries, purses and silk towels). Innovation in product designs allowed the company to expand exports both in terms of volumes and destinations, as well as sales to tourists in Cambodia.

Sales within Cambodia also grew significantly by 156%, especially due to the new shop established with ITC support. Technical assistance was provided for shop decoration and designing of product collections with company's brand identity, which increased the attractiveness of the showroom. New sales were also generated through establishing network with wholesales and consignment stores, which increased by 31% and 187% respectively. Craft Village' consigning partners increased from three to six.

Through ITC project, Craft Village expanded the number of weavers it works with for weaving and sewing, ensuring products' quality and serving to the export and local markets. Craft village expanded its contract with 3 weavers in Takeo in 2012 to over 20 weavers in Takeo and Prey Veng in 2015. It also hired 3 additional weaving groups in Phnom Penh to accommodate the growing demand. By bringing Cambodian artisans' silk products to international markets, Craft Village is committed to pay fair prices for their intricate works. In addition, Craft Village collaborates with ITC to promote eco-friendly and AZO free hand-woven silk products and urged weavers to adopt appropriate dyeing waste management.

Craft Village benefited from ITC project and increased its revenue through both market and product diversification. The owner is more confident dealing with buyers, suppliers and managing her business.

In the future, Craft Village plans to further explore export markets, expand local shops and consignment stores, develop its own group of weavers and strengthen communication channels to potential buyers such as sending emails to high-end buyers. It also plans to circulate its catalogues to consignments stores, shops and to walk-in customers, increase network and business matching activities to promote its products.

4. Goel Community

Goel Community was founded in 2006 under Church Mission. It has strong social objectives and aims to operate as a social business providing jobs to the Cambodian local community. Goel produces silk, mixed silk and cotton products in natural dye both for export and domestic markets.

In 2012, Goel received its largest order in volume from a Korean buyer which significantly increased export sales, as well as the total sales. The business volume returned to usual size in 2013. Goel established workshop centre in Takeo where it employed 12 weaving staffs and sub-contact weavers from 59 families. In 2014, Goel renovated its workshop and set up its showroom in Phnom Penh.

Goel joined ITC project in 2012 and actively participated in various trainings and several international trade fairs. The company learned about export markets' requirements and met new buyers. Goel also produced new product designs which fit local and international demands.

It benefited from mentorship from ITC to develop an export plan, improve product tags, silk colour samples, small leaflets, a catalogue and label cards. ITC project also provided technical assistance to improve its brand identity and decoration of the new showroom in Phnom Penh.

The sales (both domestic and export sales) have been quite stable since 2013. However, Goel has more prospects for 2015 with new buyers from Japan and Australia identified during the project. Goel is also planning to increase its local sales by redeploing its consignment strategy and opening a new showroom near Phnom Penh Airport.

The founder of Goel, a Korean national, is planning to retire and leave Cambodia, and the Cambodian team should take over the business. The succession plan and transition however had strong impact on its business operations. This has also limited the impact of the project on Goel since it had to devote much more time for the successful transition than to participate in project activities.

5. Kravan House

Kravan House, a women-owned company, was established in 2003, and has been offering employment to individuals and families from different villages. Meaning "Blossom House", Kravan House employs disadvantaged people like landmine victims, those who suffer from polio disease or became landless.

Kravan House participated in ITC project from 2012. It benefited from trainings to improve product quality and design, marketing and sales, brand identity, coaching to develop its export plan and to understand laboratory testing requirements. The company participated in several international trade fairs to establish contacts with buyers in the US and Europe and study tours to meet weavers in Cambodia as well as silk yarn and raw materials suppliers in Vietnam.

Quality of Kravan House's products improved thanks to the ITC training where weavers and staffs jointly learned how to manage quality of the products. The training contributed to make softer scarves, solve colour fastness and develop multiple tie dyeing and colour patterns. The training enabled weavers to meet requirements from local and international buyers and improved their production performances. Owner of Kravan House is designing the collection of tie dye products with multiple motifs and colours, based on the skills acquired from ITC training and coaching. The design attracted great interests from international buyers.

ITC also helped Kravan House to set up its own sewing centre. A study tour to different types of sewing production lines was organized to learn from the experiences and processes of big garment factory, subcontracted companies and a small household centre. This study tour together with customized coaching inspired the owner of the company and gave her confidence to set up her own sewing centre. Kravan House now has an in-house sewing centre where she is gradually adopting the assembly line processes and models, which will allow staffs to be more specialized in the production process and improve their productivities.

Kravan House significantly improved its understanding on buyers' requirements and export procedures, including laboratory testing, costing and pricing (FOB prices, most of the company's prices were ex-factory, which is not applicable for formal shipments), freight, invoicing, packing, contracting of the buyers.

As a result, the company's revenue from sales of silk products doubled between 2012 and 2014, from US\$ 75,000 to US\$ 175,000. During 2012-2014, Kravan was able to export to new markets in Europe, and increased export sales to existing buyers thanks to more diversified product collections that reflect market trends. Kravan House projects a 17-20% revenue increase in 2015.

To respond to increased orders, Kravan House slightly increased the number of its staff from 41 to 46, of which ratio of women have increased from 59% to 67%. The company also expanded the number of contracted weavers, from one group composed of 25 weavers at the beginning of the project to two groups with 35 weavers in 2015. The new group was identified during the study tour organized by ITC in 2014.

Kravan House has high awareness on environmental sustainability and adopted Azo free practices in its production, which it learned during ITC training. Kravan House also aims to obtain WFOT certificate.

6. Lotus Silk

Lotus silk, a women-owned business, was established in 2003 with the vision to create the finest quality, luxurious and vintage products in an environmentally sustainable and ethical way. 90% of Lotus Silk staffs are vulnerable women. Lotus Silk sells silk and non-silk products to local and international markets. Lotus Silk also launched organic silk yarn production, which contributes to revive sericulture production in Kampot province.

Lotus Silk is one of 14 beneficiary companies which benefited from ITC project. Staffs of Lotus Silk and weavers improved their skills on quality controls, product design and dyeing through the project. ITC support in developing company's brand identity led to a release of new company logo, which is useful to show the uniqueness and high quality of its products, including organic silk scarves. The new product collections suit market requirements better. Lotus Silk also increased its linkages with new weavers, groups of sewers and raw materials suppliers.

Lotus Silk benefited greatly from ITC support to grow its sales and revenue. Participation in overseas trade fairs allowed the company to better understand market requirements and establish contacts with potential buyers. Lotus Silk improved its communication with overseas buyers and gained insights in some export markets from the market studies conducted by ITC. The company's export plan formulates the strategies for promoting its products via traditional channels and social networks. Lotus Silk plans to establish online sales, seasonal advertisements and fashion shows to promote its brand and increase sales both locally and in overseas.

Prior to the trade fairs, ITC supported Lotus Silk to prepare promotion materials, develop new samples in line with its brand identity, improving catalogues, leaflets and price lists. The project also helped the company to develop its website including e-commerce platform. Lotus Silk has continued using the tools and templates provided by ITC to promote its products in both local and international markets and maintain longer-term business relationships with its clients.

Lotus Silk's revenue from silk products increased by 160% during 2012-2014, mainly from the growth in export sales, which multiplied by 10 between 2012 and 2014. Currently, Lotus Silk exports to clients in four markets, and is expected to reach out to two additional export markets in 2015. Lotus Silk projected that sales from silk products will increase by 20% in 2015, based on its performance in the first four months of the year.

Lotus Silk employed 11 additional staffs mainly in production, and contracted five new weavers in 2014. The contracted weavers were identified during ITC study tour. Lotus Silk is planning to contract more weavers if sales growth in 2015 and beyond maintains.

Lotus Silk believes that ITC support, especially the individual coaching sessions, improved its business performance significantly. The owner is more confident and entrepreneurial in running its business. She plans to run a boutique hotel that links with other silk businesses.

Lotus Silk promotes environmental sustainability and adopted Azo free practices in its production, and works towards obtaining WFTO certificate.

7. Lady Penh Design

Lady Penh Design was established in 2011. It is a women-owned company which provides job opportunities to women and has its own silk weaving and sewing workshop. It sources from home-based weavers in rural villages. Lady Penh Design's key products include scarves, bags, dresses and fabrics for local and international markets.

Lady Penh Design joined ITC project in 2012 and actively participated in various project activities. Participation in overseas trade fairs allowed the company to understand market demand and preferences. Lady Penh also benefitted from trade fair preparation support, including the development of specific marketing tools. Lady Penh Design's brand moved from very colourful images to more fashionable identity which reflects images of luxury, elegance, and heritage. The colour identity was also incorporated into various sales and marketing tools such as catalogue, brochure, colour chart and price lists which were developed with ITC supports.

Sales revenue slightly declined in 2014, following a drop of exports to Japan and of local sales due to several strikes which took place during the election period in the area where the company's shop is located in Phnom Penh.

During her participation in a trade fair in New York, Lady Penh Design engaged with a business partner and intermediary who will help introducing its products to the US market. Lady Penh is now designing new summer dress collections derived from its brand identity and updated export plan and participated in the New York Fashion Show in August 2015. The company projects a growth in revenue of 24% in 2015, based on extrapolation of sales figures in the first four months of the year and contacts with buyers established at the New York fair.

Lady Penh also drafted its own export plan, defining priorities to boost sales and exports. The implementation of the export plan started in the first quarter of 2015, expected to contribute to further sales in 2015.

8. Mekong Blue

Mekong Blue is an arm of Stung Treng Women's Development Center (SWDC) which was established in 2001 in Steung Treng province, with the purpose to address poverty and improve living standards by offering literacy and health education programmes, vocational training and employment. Since its inception, SWDC has directly supported over 565 women and 792 children. Mekong Blue has committed to social development and all surplus and profit margin is provided to SWDC.

Mekong Blue won UNESCO award in 2004 and 2005, with the Seal of Excellence for scarves. Mekong Blue is committed to environmental sustainability by adopting Azo free dyeing in production.

Mekong Blue produces and sells hand-made woven silk products made by 100% natural silk fibers. The major silk products of Mekong Blue are scarves. Mekong Blue also offers bags, cushion covers, wall hanging, clothes, shawls, bedding and small accessories. Mekong Blue sells domestically and to international markets. Mekong Blue partnered with online stores in the US and is working to work with online stores in other countries.

Mekong Blue joined ITC project in 2012. It benefitted from training and coaching to develop its products and access to export markets.

Mekong Blue participated in ITC training on fashion and product development, which helps the company to initiate five new product designs annually.

It participated in trade fairs in Paris and New York, where it met new buyers and increased its exports to the United States and started to exports to France in 2013 as a new market.

Export sales grew by 11% from 2012 to 2013, but experienced a significant decline in 2014 due to under-performance of partner online store in the US. With coaching support from ITC, Mekong Blue revised its export plan and could identify new online stores in the US and Japan. The company expects to nearly double its export sales in 2015 and to increase its annual revenue by 25%, based on the results achieved so far from the first quarter of 2015.

Mekong Blue also established two consignments stores in Phnom Penh, in addition to its existing 12 consignments stores in Siem Reap. ITC supported Mekong Blue to improve its showroom decoration. As a result, sales in Cambodia, mainly to foreign tourists, grew by 21% between 2012 and 2014.

While the company has reduced the overall numbers of contract weavers, it has reinforced its team with committed and qualified weaving staffs. It has also outsourced production to contracted weavers to ensure the quality and timely delivery of the products. Mekong Blue participated in ITC weaver tour in 2014 during which it identified and contracted a group of weaver in Takeo (60-70 weaver members). Expanding its production bases helped the company to cope with challenges of high turn-over rate of weaving staffs.

Mekong Blue is planning to invest in new business, restaurants and hotels, mainly for eco-friendly tourism, where customers can also visit silk production sites.

9. PhalyCraft

PhalyCraft, formerly known as Khmer Silk Processing Association (KSPA), employs and provides incomes to disabled workers. The proceeds from its sales go to the «Future Light Orphanage of World Mate» (FLOW), which supports about 200 orphans. PhalyCraft aims to become a self-sustainable organization and participated in ITC project to help achieve this objective.

ITC project assisted PhalyCraft to improve its brand identity and shop decoration to attract customers. It designed new product collections with company's brand identity and market requirements. PhalyCraft also benefited from ITC support in developing sales and marketing tools such as product catalogues, colour charts, price lists, sales terms and conditions for overseas trade fairs, international markets and local sales.

Participation in trade fairs helped PhalyCraft to learn about buyers' requirements and export management. PhalyCraft also developed an export plan for target markets and strategies.

The revenue of PhalyCraft tripled during 2012-2014. Sales to tourists tripled thanks to new shop location and decoration as well as increased numbers of consignment stores. While the company was not exporting at all at the beginning of the project, it now exports to Singapore, Japan and France.

PhalyCraft however still relies on charity donations to cover part of its operating costs. It plans to set up a workshop for weaving and dyeing and a training centre in next 3 years.

10. Soirie Du Mekong

Soirie Du Mekong (SDM) was established in 2001 in Banteay Meanchey province, Southern part of Cambodia. SDM produces 100% silk products, mainly scarves (90%) and other accessories (10%). Most of products are exported to France. Some are also available in showrooms and consignment stores in the United States and Europe (Switzerland, Belgium, Spain, Germany and UK). Sales in Cambodia represent a small portion of total sales.

SDM has a well-developed product marketing and promotion system, through a dedicated team based in Paris. The company's revenue grew by 40% from 2012 to 2014. Export of silk products grew by 36% and domestic sales mainly to tourist grew by 16 times.

SDM participated in ITC project to benefit from technical support on silk yarn sourcing and improvement of its weaving and dyeing techniques. Particularly, SDM participated in the study tour to Vietnam to connect with suppliers of silk yarn. As a result, SDM imported fine silk yarns from Vietnam to support its production.

ITC assisted SDM in areas such as silk yarn laboratory testing, specification and wrapping and dyeing, which enabled silk products to be softer after washing, and to ensure colour sealing.

With the growth of its business and revenue, SDM has been able to contribute more to local communities. SDM increased 65 contracted weavers in 2012 to 75 contracted weavers in 2014. SDM was able to improve skills and productivities of its staffs. While the numbers of staffs remained the same during 2012-2014, staff payroll have grown by 25%.

11. Sentosa Silk

Sentosa Silk, a women-owned enterprise, was founded in 2004. It employs disabled and less fortunate people. Sentosa offers a wide range of home textile, apparel and silk accessories with Khmer inspired patterns and techniques. Products are 100% hand-woven silk.

Sentosa joined ITC project in 2012. Staff and weavers benefited greatly from participations in international trade fairs and study tours, training and coaching on product and market development.

The company improved business planning with the development and implementation of a customized export plan. It developed its brand identity, new product designs and marketing materials and established new sales contacts. Sentosa embedded its brand identity perfectly into product designs and shop decoration. In addition, it was able to design new product collections matching market demand.

Sentosa expanded the number of contracted weavers from 9 in 2012 to 20 in 2015, of which 2 weavers entered formal contracts to deliver exclusive designs to Sentosa. The company plans to have formal contracts with more weavers to ensure consistent supplies while providing more confidence to contracted weavers.

New product designs enabled Sentosa to expand sales to new clients and to offset sale declines from traditional clients. New clients in Cambodia include government ministries and foreign embassies both for decoration and silk clothing, as well as hotels. Sales at the shop in Phnom Penh grew by 10%- 20% thanks to the project. In export markets, Sentosa could expand its client base in Europe and the United States. She also expected sales in Thailand.

The company could attract new buyers thanks to the "Good Design Award" received from Japan in 2014, for which ITC project provided support and coaching.

Sentosa acknowledges the importance of ITC supports in building its entrepreneurship skills and improving staff performance. With the award and improved skills on product design and market analysis, the company has gained confidence in its business and products. Staffs better understand the company's market positioning and its comparative advantage vis-à-vis competitors. The export plan, which defines future directions, tasks and targets, provides clear goals to be achieved by staffs.

With these prospects, Sentosa projects that sales may increase up to 30-40% in 2015, based on its sales level in the first quarter of 2015.

Sentosa invested to set-up a new production site. It also plans to invest in silk yarn production near Phnom Penh, the "Sentosa Silk Farm and Silk Yarn bank", which should assist weavers, middlemen and silk exporters to access silk yarn made in Cambodia. These investments should help create more employments along the value chain.

12. Villageworks

Villageworks, a women-owned company, was established in 2011 as a social enterprise. Villageworks aims to empower women to have sustainable income. The company offers silk products, cotton and recycled products to local and international markets.

Villageworks is one of 14 beneficiary companies which joined ITC project in 2012. Villageworks developed its export plan and participated in several trade fairs especially in Europe, study tours to weavers, workshops and coaching on Chorebap and scrap weaving, sewing production layout and production process flow, brand identity improvement, development of marketing tools and shop display.

Participation in trade fairs sponsored by ITC also led to access to new international buyers. Villageworks gained better understanding on export market requirements and improved communication skills with clients.

The project assisted and coached Villageworks to become a fully registered WFTO member, which is critical to secure sales with large German fair trade buyers that ITC has helped identify and increase sales with.

As a result of project support, sales of silk grew by 27% during 2012-2014. Revenue growth from export, tourist and domestic sales grew at similar rates. Villageworks established a shop in Siem Reap to increase sales to tourists, for which ITC provided advisory support.

Villageworks increased the number of its staff by 50%, mainly in production, during 2012-2014. It created 20 new jobs thanks to orders from new European buyers and set-up a new sewing workshop, where it provides employment to young handicapped people, mostly victims of polio.

The company adopts Azo free practices in its production, and plans to develop marketing materials which shows the company's environmental awareness.

13. Watthan Artisan Cambodia

Watthan Artisan Cambodia (WAC), established in 2004, is a worker-run cooperative of Cambodian artisans with disabilities who are trained in handicraft production. WAC not only offers jobs to disabled Cambodians, but also secures regular incomes to weavers. WAC produces and sells items such as silk and cotton products, recycle bags, recycled cement bags, palm leaves and wood to domestic and international markets. Silk business represents 40%-45% of the company's total business.

WAC benefited greatly from ITC project including from participation in trade fairs, study tours, training workshops and coaching on systematic dyeing and colour fixing, brand identity and marketing tools development.

Sales of silk products grew by 42% during 2012-2014, while non-silk revenue grew by 20% during the same period, principally resulting from increasing exports and local sales to tourists.

Revenues from silk exports increased by 125% from 2012 to 2014. WAC found new clients in international markets through trade fairs. It also increased sales from existing foreign clients by diversifying its product offer with attractive designs.

ITC supported WAC for brand identity development, shop decoration and to open its new showroom in Cambodia. Showrooms facilitated further increase of sales to tourists by 29% and domestic sales by 12% during 2012-2014. WAC increased its staffs as well as contracted weavers to respond to increased orders. Working through intermediaries, WAC estimates that from 40 weavers working both directly and indirectly for the company in 2012, the number increased to 88 weavers in 2014.

14. Women for Women

Women for Women was established in 2005. This women-owned business provides vocational training and employment opportunities to promote women's economic security and independence. Women for Women produces and sells only silk products to serve local and export markets.

Women for Women greatly benefited from ITC project to improve its production and increase sales. The company improved product quality and design through training and coaching on synthetic and natural dye. It developed a unique brand identity that reflects the aspiration of Women for Women, which is incorporated into the newly designed product collections and marketing materials.

Women for Women increased the number of its staff and doubled the number of contract weavers to meet the increasing demand with high quality products thanks to project support.

Participation in international trade fairs allowed Women for Women understand buyers' requirements and boost its sales. Women for Women also increased the number of wholesalers to increase its local sales in Cambodia. Women for Women was able to export to new markets in Europe, and increased export sales to existing buyers in the United States thanks to wider choice of products reflecting fashion trends and market demand.

Women for Women improved cost management and productivity. The export plan has become a guiding document to decide future directions, and to improve business performance.

As a result, the company's revenue grew by 82% during 2012-2014. Revenue from export sales more than tripled while revenue from sales to tourists more than doubled during the same period. The proportion of export sales in total sales grew from 12% to 30% in 2014.

Women for Women acknowledges the importance of ITC support for improving its products, brand positioning and sales. It is now more experienced in dealing and managing relationships with buyers. Women for Women received coaching support to develop its online sales platform which is expected to further boost sales to overseas buyers in the coming years.

Women for Women has high awareness on environmental sustainability and adopted Azo free practices in its production, partly thanks to project support.

Annex I. End-lines of key performance indicators

The table below summarizes the end-line data versus baseline data extracted from the weaver survey according to selected relevant project logical framework and performance indicators.

Strategy of Intervention	Key Performance Indicators	Baselines	End-lines	Remarks
Impact #1: Increased competitiveness of the Cambodian silk sector with a positive impact on poverty reduction through employment creation and income growth, especially among women, thereby contributing to meet Cambodia's MDGs	Increase in income of silk weavers by 200%	To be established	To be established	Income of silk weavers will be evaluated in a separate survey.
Outcome #1: Market Development Increased sales of handmade high value silk products by 8 to 12 Cambodian silk exporters, and their respective production networks of female weavers in rural villages, to up to 5 selected importing markets and to international visitors	Increase in cross-border exports of Cambodian silk products. Target: value increased by 50% at the end of the project. Benchmark to be developed under Output 1.1 (Export sales estimated at US\$1.5m) ¹	Average for all 30 companies: USD 25,417 per company (17 answered) (2012 est.) Average for 14 target beneficiary companies: USD 32,047 per company (11 answered) (2012 est.)	Average Sales Cross-border exports of Cambodian Silk Products: <ul style="list-style-type: none"> • 28,412 USD in 2011, • 30,733 USD in 2012, • 38,382 USD in 2013, • 43,321 USD in 2014, and • 55,227 USD in 2015 (projection) per company (14 answered)	Please see Figure 7.1.
	Increase in the sales value of silk products sold to tourists through different channels (shops, hotels, etc.) by male and female owned companies assisted by the project	Average for all 30 companies: USD 36,919 per company (19 answered) (2012 est.) Average for 14 target beneficiary companies: USD 18,064 per company (9 answered) (2012 est.)	Average Sales Vale of silk products sold to tourists: <ul style="list-style-type: none"> • 18,640 USD in 2012, • 27,418 USD in 2013, • 33,905 USD in 2014, and • 40,551 USD in 2015 (projection) per company (14 answered)	Please see Figure 7.1.

	Number and diversification of markets reached	<p>Average for all 30 companies: 3.14 markets reached per company (14 answered) (2012 est.)</p> <p>Average for 14 target beneficiary companies: 3.78 markets reached per company (9 answered) (2012 est.)</p>	Average for 14 target beneficiary companies: 6.1 in 2014 and 7.1 (projection) in 2015 markets reached per company (14 answered)	Please see figure 7.2.
	Number of enterprises having met buyers and transacted business	Not relevant	Not relevant	Baseline not required: activity-specific indicator
	Range of products exported	<p>Average for all 30 companies: 3.54 product lines exported per company (22 answered) (2012 est.)</p> <p>Average for 14 target beneficiary companies: 4.29 product lines exported per company (14 answered) (2012 est.)</p>	Average for 14 target beneficiary companies: 5.7 product lines exported per company (14 answered)	
	<i>Road Map Pillar2 KPI 2.3.a: Exports in new markets increase</i>	<p>For all 30 companies: Countries where surveyed companies currently export: Belgium, France, Germany, Italy Netherlands Switzerland Sweden UK USA Canada Australia New Zealand Japan Korea Singapore Thailand (22 answered)</p> <p>For 14 target beneficiary companies: Switzerland, UK, France, Germany, Spain, Italy, Sweden, Netherland, Belgium, USA, Australia, Japan, Korea, New Zealand, Canada, Singapore, Thailand (14 answered)</p>	<p>For 14 target beneficiary Companies:</p> <p>Japan, Austria, Australia, USA, UK, Spain, Italy, Belgium, New Zealand, Canada, Switzerland, France, Netherland, Germany, Vietnam, Korea, Singapore, Laos, Sweden, and Thailand.</p>	

Output 1.1 Export potential and key export markets for high value handmade silk products identified and supply capacity analyzed	Number of studies prepared	Not relevant	Not relevant	Baseline not required: activity-specific indicator
	<i>Road Map Pillar 2 KPI 2.3.7.a: Silk Sector Profile developed by VCU is used as guidance for developing market opportunities</i>	Not relevant	Not relevant	Baseline not required: activity-specific indicator
	Number of male- and female- owned silk companies made aware of market potential	Not relevant	Not relevant	Baseline not required: activity-specific indicator
Output 1.2 Marketing capacities of selected exporters strengthened and export marketing tools elaborated	Number of export plans developed and implemented by companies	For all 30 companies: 8 companies already have an export strategy. (14 answered)	14 target beneficiary companies: 14 companies already had an export plan. (14 answered)	Note: Baseline and end-line does not include the capacity of analysis of export markets
	Number of beneficiaries (male/female) enabled to analyze export markets and formulate export plans	14 target beneficiary companies: 5 companies already have an export strategy. (8 answered)		
	Number of corporate marketing tools developed/improved with support of the project	Average for all 30 companies: Average of 2 marketing tools used by a company (27 answered) 14 target beneficiary companies: Average of 3 marketing tools used by a company (13 answered)	14 target beneficiary companies: <ul style="list-style-type: none"> 14 companies already have export plan. Average 9.5 marketing tools used by a company (13 answered) The marketing tools include: trading fairs, show room, consignment, direct sales, advertising in tourists guidebooks, brand book, business card, price list, color chart, social network (website and Facebook), and sale online. 	
Output 1.3 Export and sales opportunities created in selected foreign and tourism market	Number of new buyer contacts established (Target: 25-35)	Not relevant	Not relevant	Baseline not required: activity-specific indicator
	Number/volume of orders received/letter of intent signed	Not relevant	Not relevant	Baseline not required: activity-specific indicator

	Number of trade fairs/marketing mission facilitated (Target: 4-6)	Not relevant	Not relevant	Baseline not required: activity-specific indicator
	Number of new sales outlets established (Target: 3-5)	Nb. of outlets for direct sales Average for all 30 companies: all 28 companies which answered have an outlet for direct sales 14 target beneficiary companies: all 13 companies which answered have an outlet for direct sales	53 channels (2012)	96 Channels (2015 May)
	<i>Pillar 2 Road Map KPI 2.3.7.d: Developing the value chain by integrating silk products into the tourism market</i>	Nb. of companies selling to tourists and how much For all 30 companies: 19 companies currently sell to tourists with average sales worth USD 31,487 per company in 2012 (21 answered) 14 target beneficiary companies: 10 companies currently sell to tourists with average sales worth USD 17,757 per company in 2012 (12 answered)	Average Sales Vale of silk products sold to tourists: <ul style="list-style-type: none"> • 18,640 USD in 2012, • 27,418 USD in 2013, • 33,905 USD in 2014, • 40,551 USD in 2015 (projection) per company (14 answered)	
	Number of male- and female- owned silk companies that attended dissemination workshop	Not relevant	Not relevant	Baseline not required: activity-specific indicator
Outcome #2: Product Development Improved quality and product design of handmade Cambodian silk products to meet market demand requirements for targeted export	Number of new products and collections developed/adapted by exporters during project period	Not relevant	Not relevant	Baseline not required: activity-specific indicator
	<i>Road Map Pillar 2 KPI 2.3.b: Exports of "new products" increase (in this case, new collections)</i>	Not relevant	Not relevant	Baseline not required: activity-specific indicator
	Increase in profit margins of exported products	Average for all 30 companies: USD13,280 per company (17 answered) (2012 est.)	14 target beneficiary companies: <ul style="list-style-type: none"> • 633,933 USD in 2012, • 743,298 USD in 2013, • 796,882 USD in 2014, and • 1,103,908 USD in 2015 (projection) 	Please see Figure 6

Annex II. Questionnaire for silk companies



ASSESSMENT TOOL FOR SILK COMPANY

This is survey undertaken by the International Trade Centre aiming to assess the production and export capacities of selected Cambodian Silk Companies. The information you give will be processed anonymously and NOT be used for taxation or other official purposes. Please fill in one questionnaire only for each company.

- Questionnaire n°
- Date (day/month/year):.....
- Interviewer's name and Function title:.....
- Company's name:.....

1. Company's general information

LOCATION AND CONTACTS	
1.1 Address Street	
1.2 PO BOX	
1.3 Postal Code and City	
1.4 Landline telephone number	
1.5 Mobile telephone number	
1.6 Fax number	
1.7 e-mail address	
1.8 Website address	
1.9 Owner/ CEO	
1.10 Contact Person (if different)	
1.11 Year of foundation	
1.12 Is your company registered?	Not registered <input type="checkbox"/> Registered as a commercial entity <input type="checkbox"/> Other (Explain)
1.13 Legal status of company	<input type="checkbox"/> Shareholding company with shares trade in the stock market <input type="checkbox"/> Shareholding company with non-traded shares or shares traded privately <input type="checkbox"/> Sole proprietorship man <input type="checkbox"/> woman <input type="checkbox"/> <input type="checkbox"/> Partnership <input type="checkbox"/> Limited partnership <input type="checkbox"/> Other. Specify _____
1.14 What types of products have you sold?	
1.15 Proportion (%) of business in silk among the whole business	
1.16 Percentage (%) of sales of silk products in domestic sales and export sales	Domestic sales: Export sales:

1.17 Do you have an export license?	Yes <input type="checkbox"/> No <input type="checkbox"/>
1.18 Is your company registered / engaged with.....	Export promotion agency / buying agents <input type="checkbox"/> Chamber of commerce <input type="checkbox"/> Specify : _____ Business Association <input type="checkbox"/> Specify: _____ Other <input type="checkbox"/> Specify _____

2. Employment

EMPLOYEES	2012	2013	2014	20015(Pro.)
2.1 Number of employees (total)	Men: Women:	Men: Women:	Men: Women:	Men: Women:
2.2 Number of employees in managerial positions	Men: Women:	Men: Women:	Men: Women:	Men: Women:
2.3 Number of employees in administrative and finance positions	Men: Women:	Men: Women:	Men: Women:	Men: Women:
2.4 Number of employees in sales	Men: Women:	Men: Women:	Men: Women:	Men: Women:
2.5 Number of employees in marketing	Men: Women:	Men: Women:	Men: Women:	Men: Women:
2.6 Number of employees in production	Men: Women:	Men: Women:	Men: Women:	Men: Women:
2.7 Number of employees in other positions (specify)	Men: Women:	Men: Women:	Men: Women:	Men: Women:
2.8 How many new positions or new job opportunities have been created in your company so far?	Men: Women:	Men: Women:	Men: Women:	Men: Women:

3. Company's economic background

Market Export	2012	2013	2014	2015 (Pro.)
3.1 Could you provide total annual sales figures of your company for the last completed 4 years (2012-2015) (US dollars)?				
3.2 Could you provide total annual expenses for the last completed 4 years (2012-2015) (US dollars)? (If possible ask for financial statement or loss and profit statement.)	2012 Personnel (e.g. staff salary):	2013 Personnel (e.g. staff salary):	2014 Personnel (e.g. staff salary): Raw	2015 Personnel (e.g. staff salary): Raw materials

	Raw materials and intermediate materials: Production (e.g. rent, equipment etc.): Packaging: Marketing (e.g. website, fair participation, advertisement etc.): Water and electricity: Others: Total expenditure:	Raw materials and intermediate materials: Production (e.g. rent, equipment etc.): Packaging: Marketing (e.g. website, fair participation, advertisement etc.): Water and electricity: Others: Total expenditure:	materials and intermediate materials: Production (e.g. rent, equipment etc.): Packaging: Marketing (e.g. website, fair participation, advertisement etc.): Water and electricity: Others: Total expenditure :	and intermediate materials: Production (e.g. rent, equipment etc.): Packaging: Marketing (e.g. website, fair participation, advertisement etc.): Water and electricity: Others: Total expenditure:
3.3 Why have your total annual sales been increased or decreased during the last 4 years?				
3.4 Why have your total annual expenditures been increased or decreased during the last 4 years?				

4. Export Diversification

Year	2012	2013	2014	2015 (Pro.)
Export Market by products				

4.1 What type of products have your company sold annually?	Bag Organza: Value (US dollars): Quantity: Market:			
	Fabric (m2): Value (US dollars): Quantity: Market:			
	Bag: Value (US dollars): Quantity: Market:	Bag: Value (US dollars): Quantity: Market:	Bag: Value (US dollars): Quantity: Market:	Bag: Value (US dollars): Quantity: Market:
	Scarves: Value (US dollars): Quantity: Market:	Scarves: Value (US dollars): Quantity: Market:	Scarves: Value (US dollars): Quantity: Market:	Scarves: Value (US dollars): Quantity: Market:
	Organza scarf: Value (US dollars): Quantity: Market:			
	Accessories: Value (US dollars): Quantity: Market:	Accessories: Value (US dollars): Quantity: Market:	Accessories: Value (US dollars): Quantity: Market:	Accessories: Value (US dollars): Quantity: Market:
	Handkerchiefs: Value (US dollars): Quantity: Market:	Handkerchiefs: Value (US dollars): Quantity: Market:	Handkerchiefs: Value (US dollars): Quantity: Market:	Handkerchiefs: Value (US dollars): Quantity: Market:
	Clothing: Value (US dollars): Quantity: Market:	Clothing: Value (US dollars): Quantity: Market:	Clothing: Value (US dollars): Quantity: Market:	Clothing: Value (US dollars): Quantity: Market:
	Bag and Purse: Value (US dollars): Quantity: Market:			
	Cushions: Value (US dollars): Quantity: Market:	Cushions: Value (US dollars): Quantity: Market:	Cushions: Value (US dollars): Quantity: Market:	Cushions: Value (US dollars): Quantity: Market:
Ties:	Ties:	Ties:	Ties:	

Value (US dollars): Quantity: Market:	Value (US dollars): Quantity: Market:	Value (US dollars): Quantity: Market:	Value (US dollars): Quantity: Market:
Toy: Value (US dollars): Quantity: Market:	Toy: Value (US dollars): Quantity: Market:	Toy: Value (US dollars): Quantity: Market:	Toy: Value (US dollars): Quantity: Market:
Purse: Value (US dollars): Quantity: Market:	Purse: Value (US dollars): Quantity: Market:	Purse: Value (US dollars): Quantity: Market:	Purse: Value (US dollars): Quantity: Market:
Wall hanging: Value (US dollars): Quantity: Market:			
Hat: Value (US dollars): Quantity: Market:	Hat: Value (US dollars): Quantity: Market:	Hat: Value (US dollars): Quantity: Market:	Hat: Value (US dollars): Quantity: Market:
Covered book: Value (US dollars): Quantity: Market:			
Shawl: Value (US dollars): Quantity: Market:	Shawl: Value (US dollars): Quantity: Market:	Shawl: Value (US dollars): Quantity: Market:	Shawl: Value (US dollars): Quantity: Market:
Sampot-jaquard: Value (US dollars): Quantity: Market:	Sampot-jaquard: Value (US dollars): Quantity: Market:	Sampot-jaquard: Value (US dollars): Quantity: Market:	Sampot-jaquard: Value (US dollars): Quantity: Market:
Bed linen: Value (US dollars): Quantity: Market:			
Blanket: Value (US dollars): Quantity: Market:	Blanket: Value (US dollars): Quantity: Market:	Blanket: Value (US dollars): Quantity: Market:	Blanket: Value (US dollars): Quantity: Market:
Curtain: Value (US dollars): Quantity:	Curtain: Value (US dollars): Quantity:	Curtain: Value (US dollars): Quantity:	Curtain: Value (US dollars): Quantity:

	<p>Market:</p> <p>Shoes: Value (US dollars): Quantity: Market:</p> <p>Fashion Jewelleries: Value (US dollars): Quantity: Market:</p> <p>Home Decors: Value (US dollars): Quantity: Market:</p> <p>Christmas Ornaments/toys: Value (US dollars): Quantity: Market:</p> <p>Other: Value (US dollars): Quantity: Market:</p> <p>Other: Value (US dollars): Quantity: Market:</p> <p>Total: Value (US dollars): Quantity:</p>	<p>Market:</p> <p>Shoes: Value (US dollars): Quantity: Market:</p> <p>Fashion Jewelleries: Value (US dollars): Quantity: Market:</p> <p>Home Decors: Value (US dollars): Quantity: Market:</p> <p>Christmas Ornaments/toys: Value (US dollars): Quantity: Market:</p> <p>Other: Value (US dollars): Quantity: Market:</p> <p>Other: Value (US dollars): Quantity: Market:</p> <p>Total: Value (US dollars): Quantity:</p>	<p>Market:</p> <p>Shoes: Value (US dollars): Quantity: Market:</p> <p>Fashion Jewelleries: Value (US dollars): Quantity: Market:</p> <p>Home Decors: Value (US dollars): Quantity: Market:</p> <p>Christmas Ornaments/toys: Value (US dollars): Quantity: Market:</p> <p>Other: Value (US dollars): Quantity: Market:</p> <p>Other: Value (US dollars): Quantity: Market:</p> <p>Total: Value (US dollars): Quantity:</p>	<p>Market:</p> <p>Shoes: Value (US dollars): Quantity: Market:</p> <p>Fashion Jewelleries: Value (US dollars): Quantity: Market:</p> <p>Home Decors: Value (US dollars): Quantity: Market:</p> <p>Christmas Ornaments/toys: Value (US dollars): Quantity: Market:</p> <p>Other: Value (US dollars): Quantity: Market:</p> <p>Other: Value (US dollars): Quantity: Market:</p> <p>Total: Value (US dollars): Quantity:</p>
Silk Products				
4.2 Could you provide the annual sales figures from silk products only for the last completed 4 years (2012-2015) according to market segmentation?	<p>2012</p> <p>Domestic sales Value (US dollars): Quantity of Silk:</p> <p>Sales to tourists Value (US Dollars): Quantity of Silk:</p> <p>Cross-border</p>	<p>2013</p> <p>Domestic sales Value (US dollars): Quantity of Silk:</p> <p>Sales to tourists Value (US Dollars): Quantity of Silk:</p> <p>Cross-border</p>	<p>2014</p> <p>Domestic sales Value (US dollars): Quantity of Silk:</p> <p>Sales to tourists Value (US Dollars): Quantity of Silk:</p> <p>Cross-border Exports</p>	<p>2015 (Pro.)</p> <p>Domestic sales Value (US dollars): Quantity of Silk:</p> <p>Sales to tourists Value (US Dollars): Quantity of Silk:</p> <p>Cross-border</p>

	Exports Value (US dollars): Quantity of Silk:	Exports Value (US dollars): Quantity of Silk:	Value (US dollars): Quantity of Silk:	Exports Value (US dollars): Quantity of Silk:
4.3 How do you sell the silk products to the domestic market?				
4.4 How do you sell the silk products to the tourists?				
4.5 How do you sell the silk products to international markets?				
4.6 Could you provide the total value and quantity of the sales of silk products for the last completed 4 years (2012-2015) (US dollars) to each export market?	2012 France (US dollars): Quantity of Silk: USA (US dollars): Quantity of Silk: Australia (US dollars): Quantity of Silk: UK (US dollars): Quantity of Silk: Japan : (US dollars): Quantity of Silk: Vietnam (US dollars): Quantity of Silk: Switzerland (US dollars): Quantity of Silk: Other markets (US dollars): Quantity of Silk: Other markets : (US dollars): Quantity of Silk: Other markets : (US dollars): Quantity of Silk: Total:	2013 France (US dollars): Quantity of Silk: USA (US dollars): Quantity of Silk: Australia (US dollars): Quantity of Silk: Lao (US dollars): Quantity of Silk: Japan : (US dollars): Quantity of Silk: Holland (US dollars): Quantity of Silk: Switzerland (US dollars): Quantity of Silk: Other markets (US dollars): Quantity of Silk: Other markets : (US dollars): Quantity of Silk: Other markets (NL) : (US dollars): Quantity of Silk: Other markets:	2014 France (US dollars): Quantity of Silk: USA (US dollars): Quantity of Silk: Australia (US dollars): Quantity of Silk: Lao (US dollars): Quantity of Silk: Japan : (US dollars): Quantity of Silk: Korea (US dollars): Quantity of Silk: Switzerland (US dollars): Quantity of Silk: Other markets (US dollars): Quantity of Silk: Other markets : (US dollars): Quantity of Silk: Other markets: (US dollars): Quantity of Silk: Other markets :	2015 (Pro.) France (US dollars): Quantity of Silk: USA (US dollars): Quantity of Silk: Australia (US dollars): Quantity of Silk: UK (US dollars): Quantity of Silk: Japan : (US dollars): Quantity of Silk: Korea (US dollars): Quantity of Silk: Switzerland (US dollars): Quantity of Silk: Other markets (US dollars): Quantity of Silk: Other markets : (US dollars): Quantity of Silk: Other markets : (US dollars): Quantity of Silk: Total:

	Value (US dollars): Quantity of Silk:	(US dollars): Quantity of Silk: Total: Value (US dollars): Quantity of Silk:	(US dollars): Quantity of Silk: Total: Value (US dollars): Quantity of Silk:	Value (US dollars): Quantity of Silk:
4.7 Please provide the reasons why the exports of silk have been increased or decreased significantly by year?				
4.8 Do you have a business plan/export plan? Please indicate the evidence.				
4.9 If yes, have you implemented it?				
4.10 What are the main challenges that your company are facing for the silk products?				
4.11 What is your suggestion and recommendations for improving the exports of silk to domestic, tourist and cross-boarders?				

5. Business Expansion

Expansion and Investment	2012	2013	2014	2015 (Pro.)
5.1 How many consignment channels does your company have?				
5.2 How many showrooms does your company have?				
5.3 How many branches does your company have?				
5.4 How many production sites does your company have?				

5.5 Are there any other business expansion and investment? Please specify:..... Please specify:..... Please specify:.....				
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6. Product Development

Product Development	2012	2013	2014	2015 (Pro.)
6.1 How many new products and collections have been developed and adapted after project starts?				
6.2 How many sample products have been accepted by buyers with respect to compliance with quality requirements?				
6.3 Could you estimate the acceptance rate of product samples by buyers with respect to compliance with quality requirements?				
6.4 How many quantity/Value of silk have you ordered from weavers?	Value (US dollars): Quantity of Silk:			

7. Raw Materials

7.1 What kind of silk yarn do you use? And where is it from?	Fine Silk	China <input type="checkbox"/> Vietnam <input type="checkbox"/> Thailand <input type="checkbox"/> Domestic <input type="checkbox"/>
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		Other <input type="checkbox"/> Please specify.....		
	Rough Silk	China <input type="checkbox"/> Vietnam <input type="checkbox"/> Thailand <input type="checkbox"/> Domestic <input type="checkbox"/> Other <input type="checkbox"/> Please specify.....		
Silk yarns imported by year	2012	2013	2014	2015 (Pro.)
7.2 The silk yarns have been imported from China	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):
7.3 The silk yarns have been imported from Vietnam	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):
7.4 The silk yarns have been imported from Thailand	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):
7.5 The silk yarns have been imported from Domestic	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):
7.6 The silk yarns have been imported from others.....	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):
7.7 The silk yarns have been imported from others.....	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):	Quantity of silk yarn (kg): Value (USD):
7.8 Total quantity and value of silk yarns have been imported	Quantity of silk yarn (kg):	Quantity of silk yarn (kg):	Quantity of silk yarn (kg):	Quantity of silk yarn (kg):

	Value (USD):	Value (USD):	Value (USD):	Value (USD):
7.9 Total quantity of value of silk yarns has a certificate of country of origin	Quantity of silk yarn (kg): Value (USD):			
7.10 How many weavers has your company sub-contracted?	Women: Man:	Women: Man:	Women: Man:	Women: Man:

8. Technical Assistance

8.1 What challenges are you company were facing for the export of products, prior obtaining technical assistance?	Lack of finance <input type="checkbox"/> Relations with weavers <input type="checkbox"/> Production equipment <input type="checkbox"/> Supply material <input type="checkbox"/> Design <input type="checkbox"/> Costing and Pricing <input type="checkbox"/> Logistics <input type="checkbox"/> Marketing and sales <input type="checkbox"/> Communication with buyers (English skills) <input type="checkbox"/> Finding buyers <input type="checkbox"/> Packaging <input type="checkbox"/> High Expenses <input type="checkbox"/> Quality management <input type="checkbox"/> Bureaucracy <input type="checkbox"/> Other <input type="checkbox"/> (specify) Explain:
8.2 What type of technical assistance or supports have you received?	Sourcing of inputs (Prod Materials and labor source) <input type="checkbox"/> Design <input type="checkbox"/> Identification of new markets and buyers <input type="checkbox"/> Marketing and sales <input type="checkbox"/> Trade fair participation <input type="checkbox"/> where: _____ when: _____ Costing and Pricing <input type="checkbox"/> Packaging <input type="checkbox"/> Quality management <input type="checkbox"/> Production techniques <input type="checkbox"/> Other <input type="checkbox"/> (specify)
8.3 Who provided technical assistance or supports? (please also indicate the duration)	

<p>8.4 Which types of technical assistance do you consider the most important for your company?</p>	<p>Sourcing of inputs (Prod Materials and labor source) <input type="checkbox"/></p> <p>Design <input type="checkbox"/></p> <p>Identification of new markets and buyers <input type="checkbox"/></p> <p>Marketing and sales <input type="checkbox"/></p> <p>Costing and Pricing <input type="checkbox"/></p> <p>Packaging <input type="checkbox"/></p> <p>Quality management <input type="checkbox"/></p> <p>Production techniques <input type="checkbox"/></p> <p>Supply Management (including imports of silk yarn and other factors of production) <input type="checkbox"/></p> <p>Other <input type="checkbox"/> (specify):</p>
<p>8.5 Are there any particular lessons that you have learned so far that could be useful for other people implementing similar projects?</p>	
<p>8.6 Have you observed any changes after project has started?</p>	
<p>8.7 What are your suggestions and recommendations to improve the project implementation?</p>	

9. List of Attachment

1. Financial Statement 2012-2014, and 2015 (projection)
2. Income Statement 2012-2014, and 2015(Projection)
3. Pay-roll list from 2012-2015
4. List of export products and markets 2012-2015
5. List of import raw materials and sources 2012-2015
6. Export plan
7. Other supporting documents (Such as Marketing materials)



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Project Facebook page: <https://www.facebook.com/pages/CEDEP-I-Cambodian-High-Value-Silk/141914845991104>

Project video on YouTube: <http://www.youtube.com/watch?v=L0Z5ZQpTPtE&feature=youtu.be>