



FEED^{THE}**FUTURE**

The U.S. Government's Global Hunger & Food Security Initiative

GLOBAL LEARNING AND EVIDENCE EXCHANGE

M A R K E T S Y S T E M S

MARCH 21-24, 2017 // BANGKOK, THAILAND

Better Integration of Trade and Agriculture Programming: the case for Cambodia



Cambodia's economy in a nutshell

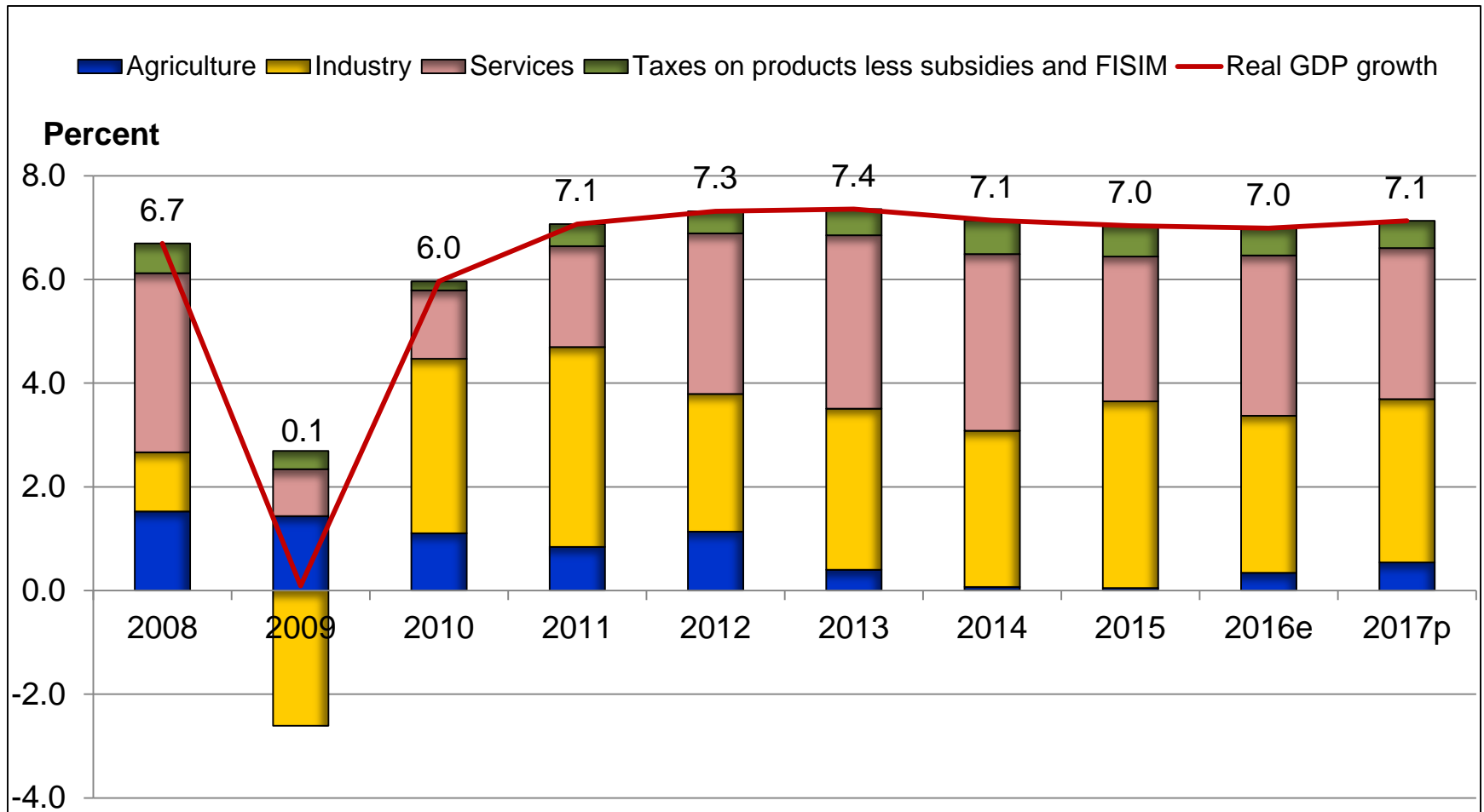
- High rates of economic growth (+7%)
- Lots of foreign investment in construction
- Growth in the service sector
- Garments dominate the industrial sector
- Decreasing share of agriculture in the economy
- 80% of the population lives and works in rural areas



Photo credit: <http://travelinnate.com/>



Contributions to GDP Growth





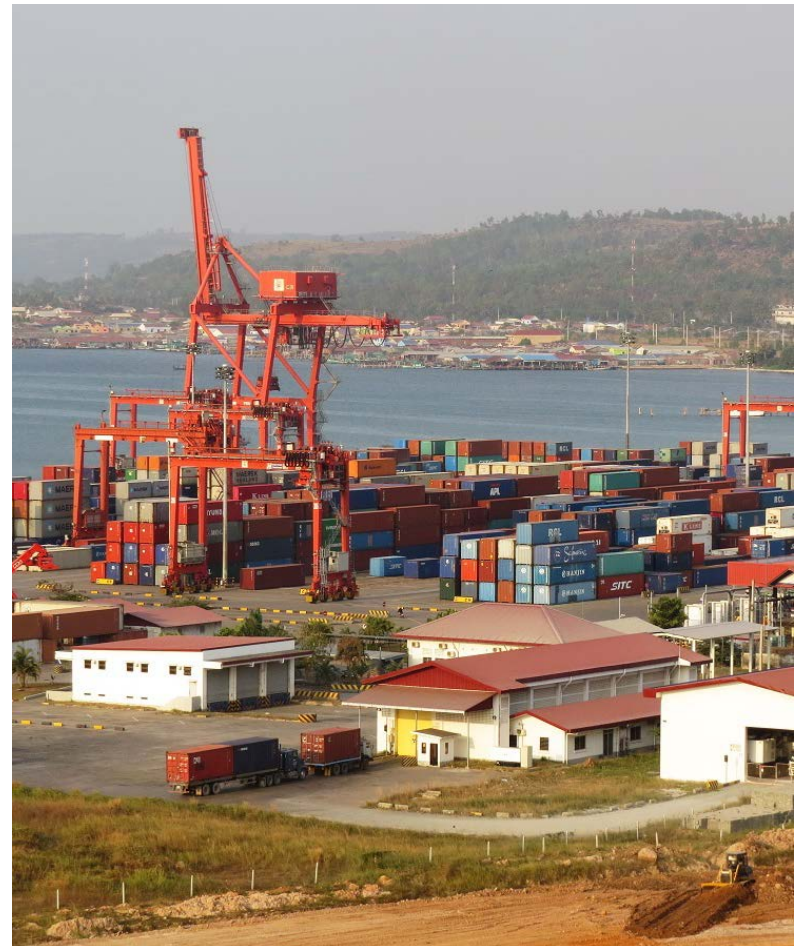
Detailed look at Cambodia's Agriculture

Agricultural production (total production, tons)	2014-2015	2015-2016	Change (%)
Rice	9,324,416	9,335,284	0.1%
Cassava	11,943,204	13,298,108	11.3%
Corn	549,607	399,649	-27.3%
Vegetable	405,527	415,239	2.4%
Bean	60,652	59,220	-2.4%
Rubber	97,054	126,861	30.7%



Export Context

- Reliance in the EU and US markets
- Regional markets do not occupy a strategic position in the Cambodia export destination basket – ASEAN only 8%
- Lack of products to export and quality control issues





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Cambodia's product space map

\$11.2B USD



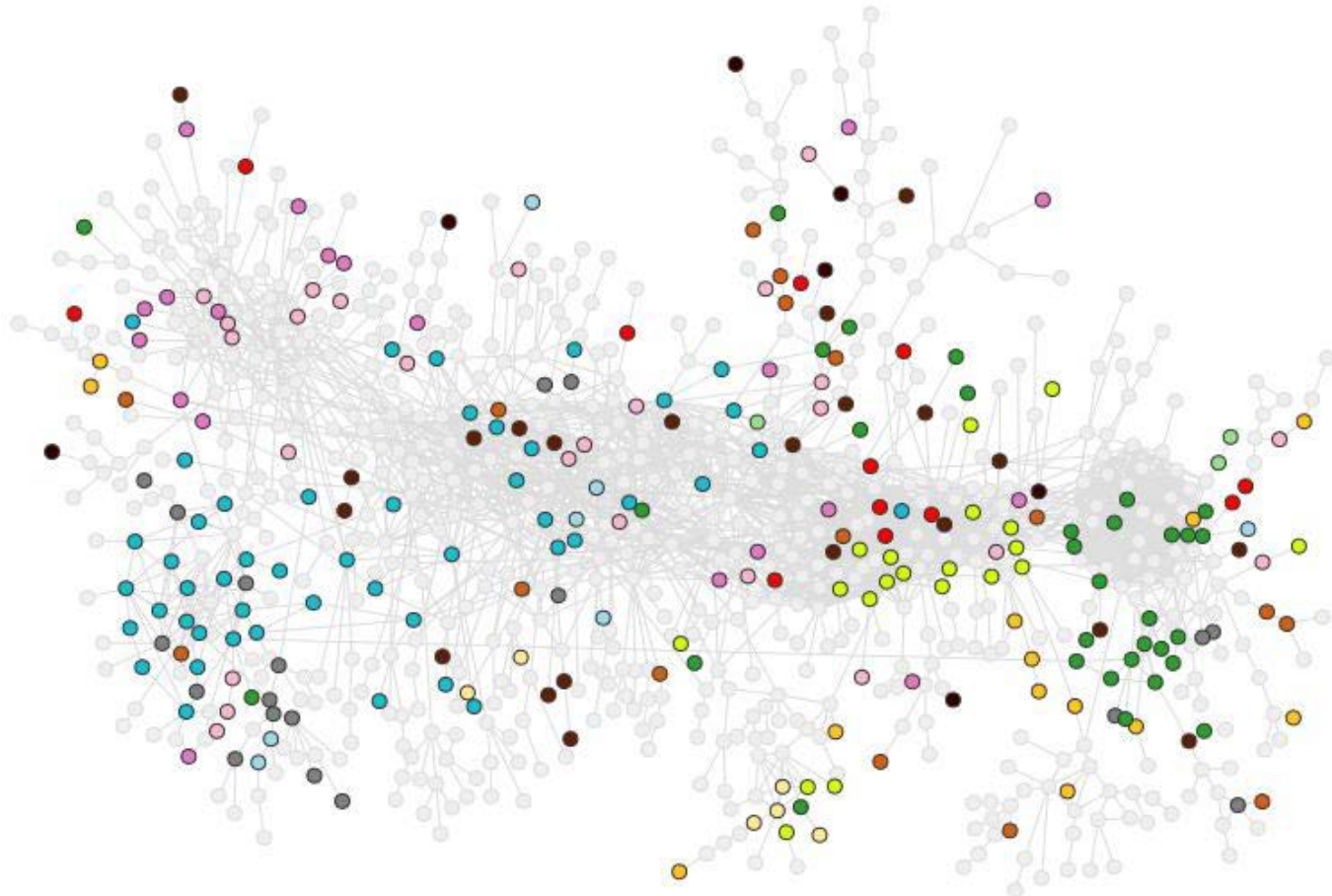


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Thailand's product space map

\$235B USD





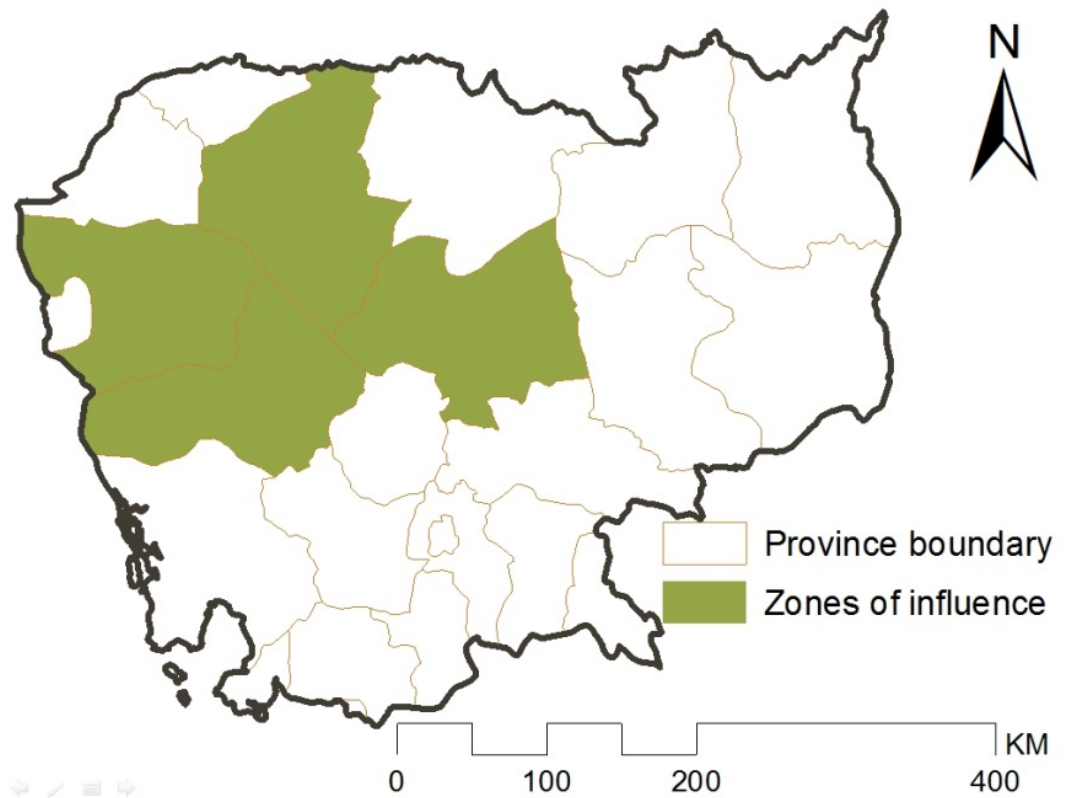
Feed the Future Cambodia

Value chain focus:

Horticulture, rice, and fish

Key objectives:

- Improve food security
- Enhance capacity to improve sustainable agricultural production
- Improve rural income generation
- Enhance capacity to meet food and other nutritional needs of targeted population





Top line FTF Results

Feed the Future Indicator	Baseline (2009/2010)		Interim (YEAR)		FY17 Target
	Estimate	95% CI*	Estimate	95% CI*	
GOAL LEVEL					
Prevalence of poverty	11.7%	N/A	8.68%	N/A	8.78%
Prevalence of stunted children	43.95%	N/A	33.7%	29.1-38.2	35.15%
OBJECTIVE LEVEL					
Daily per capita expenditures	\$1.61	N/A	\$5.0	4.7-5.3	\$2.39
Prevalence of underweight children	30.30%	N/A	25.1%	20.9-29.3	24.25%



Future of Feed the Future Cambodia

Strengthening Market Systems -

1. Market participation
2. Market linkages
3. Policy environment – this is where trade comes in....

Integrated Nutrition Programming-

1. Target the poorest of the poor
2. Integrated programming to include WASH and nutrition
3. Integrated programming to include NRM and nutrition





Slow path to economic growth activities

1. Trade Facilitation Agreement Assistance – Asia Bureau
2. Trans-pacific partnership analysis – E3
3. Trade Policy Review – E3
4. Sanitary and Phyto-sanitary regulation gaps analysis – USDA
5. Food Security Service Center – draft law on plant inspection - Mission
6. ACTI – National and ASEAN single window - RDMA



Lessons Learned

- Go slowly and take your time
- Build relationships
- Find your niche
- Seek help
- Buy-in or leadership from the host country government
- Explore multiple pathways to incorporating trade
- Stay flexible given uncertain budgets





Questions for the Audience

1. How does USAID's approach to agriculture and food security align with regional integration (in the Asian context)?
2. Where are the key jumping points for USAID in agriculture and trade?
3. Other than SPS/Food Safety, are there other areas for agriculture and trade?
4. Given the rapid pace of growth and integration, how can we design our projects to build towards trade?

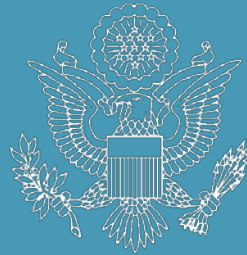


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Sang Lee
Agriculture Officer – USAID/Cambodia
salee@usaid.gov

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