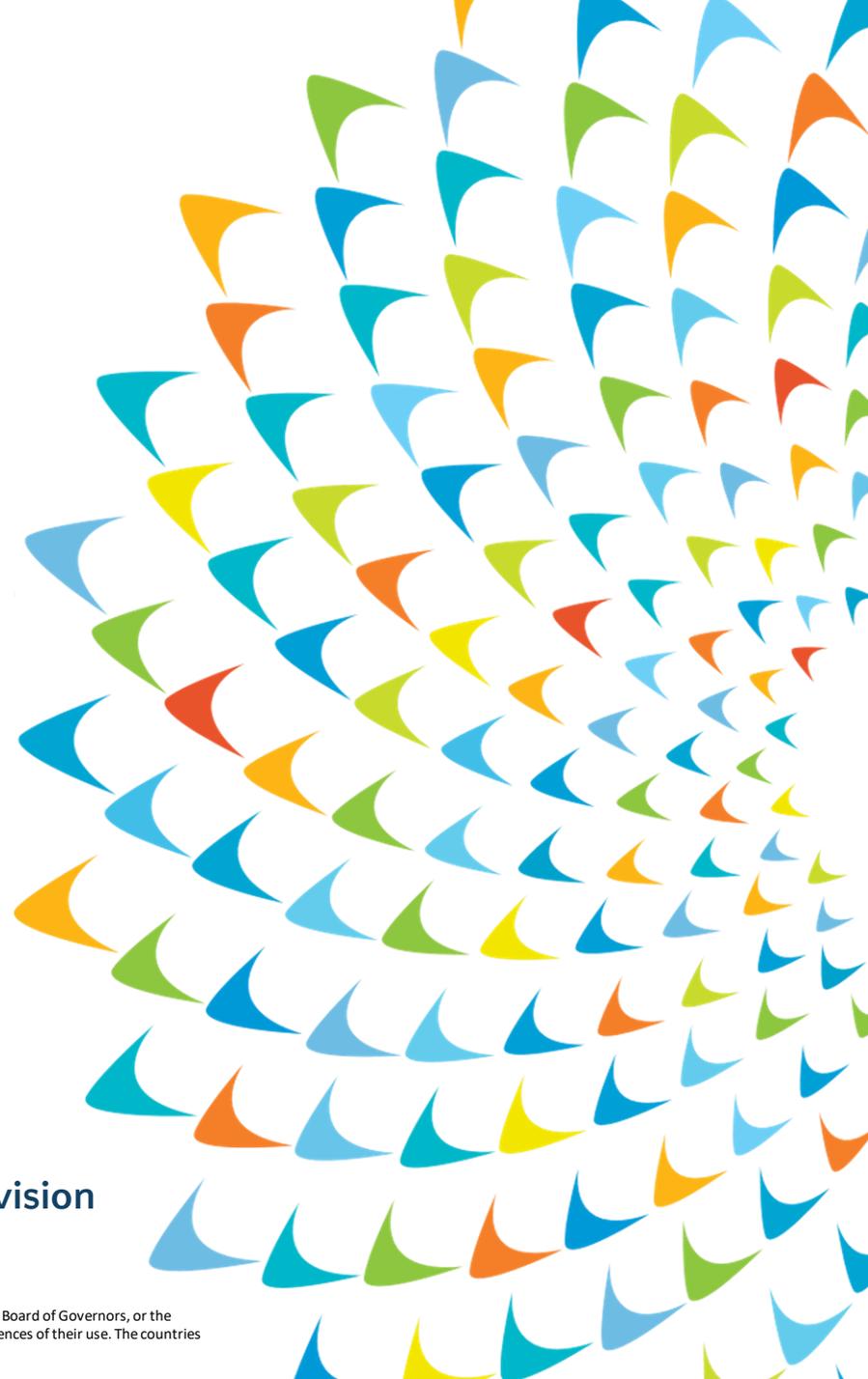




Cambodia Agriculture, Natural Resources, and Rural Development (ANRRD) Sector Assessment, Strategy and Roadmap

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Southeast Asia Department



1. Sector Assessment, Strategy and Roadmap (ASR)
2. Sector Assessment
3. Government and ADB Strategies
4. Key Sector Strategic Areas
5. Key Area 2. Strengthening Agricultural Value Chains



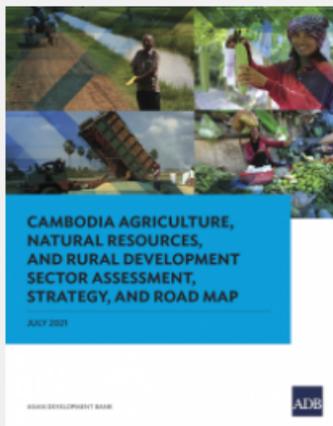
Sector Assessment, Strategy and Roadmap (ASR)



- A core and routine activity and operations knowledge product to inform planning for lending and non-lending knowledge products and services.
- A combined analytical, strategic and planning tool and integral part of the sector and thematic work needed for country and project planning.
- To inform implications of ADB's support program to sector development of ADB's developing member countries.

Cambodia Agriculture, Natural Resources, and Rural Development Sector Assessment, Strategy, and Road Map

Publication | July 2021



This publication presents an assessment of Cambodia's agriculture, natural resources, and rural development (ANRRD) sector and provides a strategy and road map for its future development.

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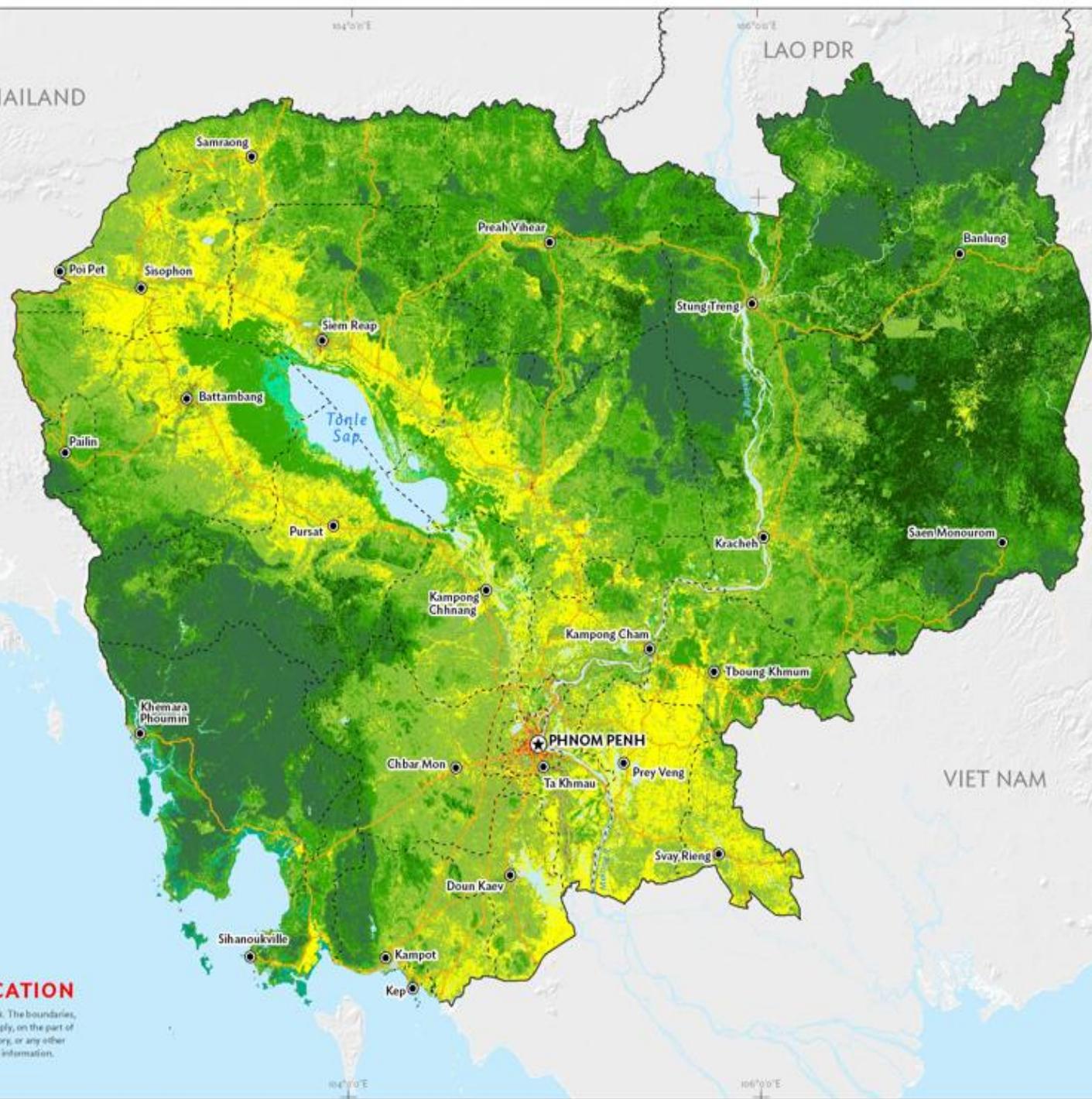
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<http://dx.doi.org/10.22617/TCS210256-2>

Legend

- ★ Capital City
- Provincial Capital
- Road
- - - Provincial Boundary
- International Boundary
- Water
- Mangrove Forest
- Flooded Forest
- Deciduous Forest
- Evergreen Forest
- Mixed Evergreen and Deciduous
- Urban and Built-up
- Cropland
- Rice Paddy
- Wetlands
- Barren



Gulf of Thailand



0 25 50 100

Kilometers

PROOF ONLY - NOT FOR PUBLICATION

This map was produced by the cartography unit of the Asian Development Bank. The boundaries, colors, denominations, and any other information shown on this map do not imply, on the part of the Asian Development Bank, any judgement on the legal status of any territory, or any other endorsement or acceptance of such boundaries, colors, denominations, or information.

Sector Assessment – Country Context

- **High economic growth for over 2 decades:** average annual growth rates of over 7% during 1994–2019.
- **High share of agriculture in gross domestic product (22.1%) and in employment (32.3%)**
- **Low agriculture sector growth (annually 0.85% on average) since 2013**
- **COVID impacts:**
 - fairly stable prices for most key food commodities over the first 10 months of 2020
 - loss of livelihoods and income for many households and inability to afford sufficient and nutritious foods
 - the government launched a cash transfer program since June 2020 to provide support to vulnerable households

Sector Assessment – Country Context

- **Improved, yet precarious poverty situation:** declined from 47.8% in 2007 to 9.5% in 2019; however, many lifted out of poverty is still close to the poverty line.
- **Closing, yet significant rural–urban disparity:** Rural income proportion to urban income reduced from about 40%–55% in 2012 to 50%–60% in 2016 partly by increases in transfers (i.e., remittances) and by the decline in self-employed agricultural income.
- **Decreasing average landholdings and widening inequality in land distribution.**
- **Decreasing share of farm income for rural population.**

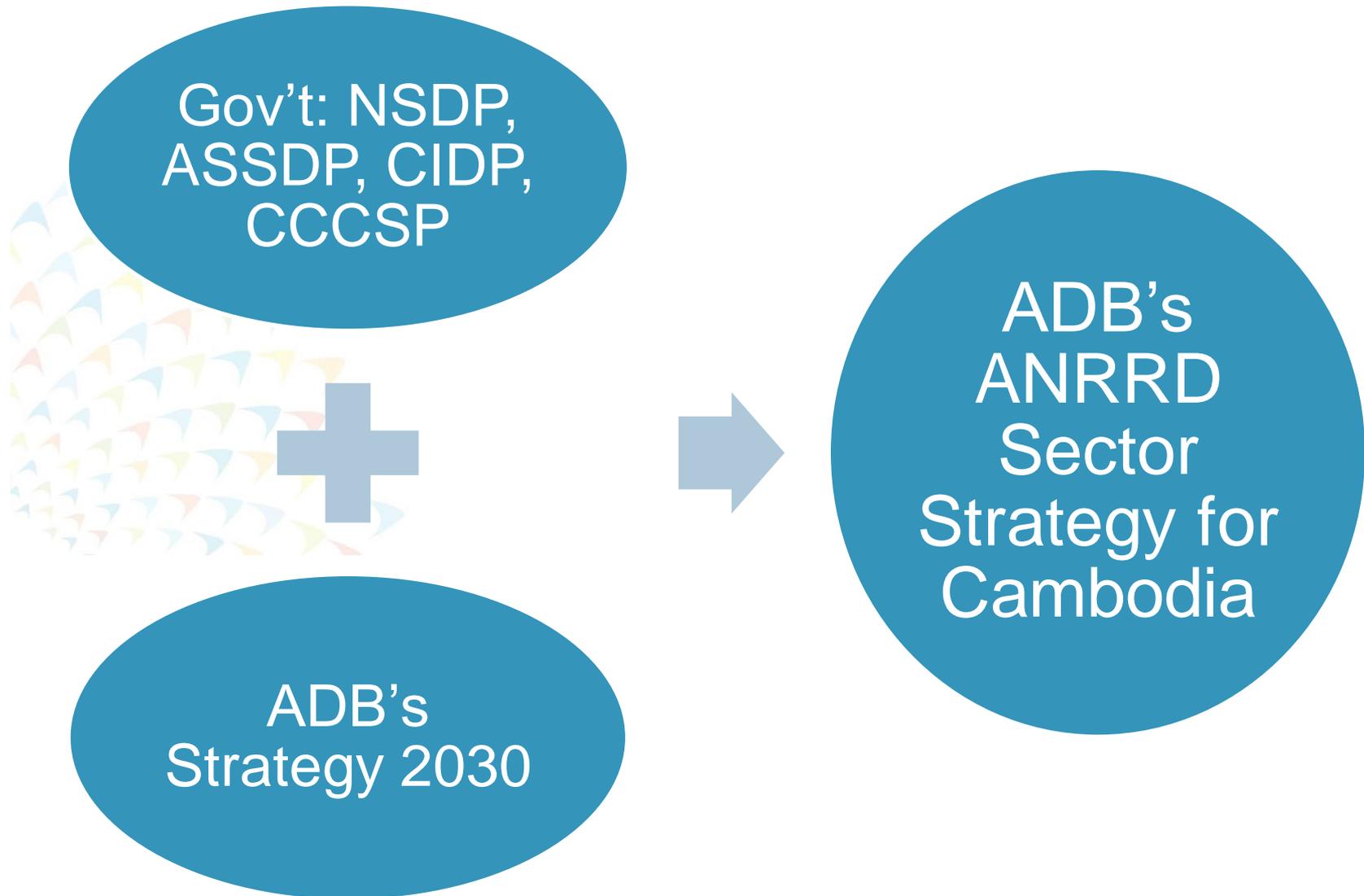
Sector Assessment – Sector Issues

- **Agriculture:**
 - Weak processing capacity, limited access to inputs, markets, transport and logistics, information and technology, finance, extension services

- **Natural Resources:**
 - Water resources
 - Limited irrigated arable land
 - Absence of integrated water resources management strategy
 - Weak O&M
 - Forests and biodiversity:
 - Declining forest cover
 - Degradation of most of the remaining forests
 - Endangered native flora and fauna species

- **Cross-cutting issues:**
 - Food security, safety and nutrition
 - Climate change and disaster risk

Government and ADB's Strategies



ADB's ANRRD Sector Key Strategic Areas

1. Enhancing agricultural productivity
2. **Strengthening agricultural value chains (AVC)**
3. Strengthening natural resources management and disaster resilience

Key Area 2.

Strengthening AVC



Assessment on AVC

Weak Agricultural Value Chains



Limited processing capacity

Fragmented production

Poor access to finance

Weak rural road network

Poor access to technologies

ADB's Operation in AVC

Project	Financing (\$million)
Climate-Resilient Rice Commercialization Sector Development Project (2013)	63.43
Climate-Friendly Agribusiness Value Chains Sector Project (2018)	141.04
Agricultural Value Chain Competitiveness and Safety Enhancement Project (2020)	110.06
GMS Cross-Border Livestock Health and Value Chains Improvement Project (2022)	80.00
Argo-Industrial Park Development Project (2024)	TBD



Thank you.

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