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# Cambodia

## Food price update – November 2020

Focus: Effect of the COVID-19 outbreak on food prices

Vulnerability Analysis and Mapping (VAM) Unit - Cambodia Country Office



# Preface

The COVID-19 pandemic has been rapidly evolving across the world since the beginning of 2020. On 11 March, the World Health Organization (WHO) categorized it as a global pandemic. There are more than 61 million confirmed cases and more than 1.4 million deaths worldwide (WHO, 29 November). In Cambodia, since the first reported case on 27 January, there have been a total of 329 cases and no deaths. A majority of cases were imported and there have been 20 cases from community transmission (MOH, 1 Dec 2020).

The COVID-19 pandemic has had a major impact on the global economy. Trade and travel have been severely restricted, and many countries, including Cambodia and others across Asia, have instituted measures to contain the spread.

In order to understand if the COVID-19 pandemic has impacted food availability and access at markets in Cambodia, the World Food Programme (WFP) monitors the retail and wholesale prices of key food commodities (see Annex 1 and 2) in 45 urban and rural markets across the country (*see the Methods section for more details*). An average of 340 traders and market chiefs are interviewed every two weeks, through a call center contracted by WFP. In addition to prices, market chiefs are also interviewed to assess market functionality, including supply and demand issues. Additional information is used to interpret the results and understand the broader context.

This update is based on market data collected in the first and third weeks of November 2020.

This system is based on long-term cooperation between WFP and the Agricultural Marketing Office (AMO) of the Ministry of Agriculture, Forestry and Fisheries (MAFF).

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# Key findings



## COVID-19 & Environmental Factors Influencing Prices

The COVID-19 pandemic has spread rapidly since January and has continued to impact economic activities across the world. Economic growth for Cambodia is projected to have negative growth of -2% in 2020 (World Bank, October 2020). Cambodia's GDP growth rate is expected to contract by 4.0% in 2020 and grow by 5.9% in 2021 (ADB, September 2020).

For the global food trade, COVID-19 has impacted both supply and demand. Several Southeast Asian countries imposed border controls, which disrupted the flow and prices of commodities. In Cambodia, the Government's ban on rice exports in April was lifted on 20 May. Cambodia exported 0.6 million tonnes of rice in the first 11 months of 2020, 16.9% higher than last year.

**In November, Cambodia received less rainfall than the long-term average** (see Annex 3) and the Mekong and Tonle Sap river levels are lower than the historical average (Mekong River Commission, 2020), causing concerns of water shortages in the dry season (November – April).



## Longer-Term Trend Analysis (November 2019 – November 2020)

**In Cambodia prices have remained fairly stable for most key food commodities for the past 10 months, though there was a slight spike in late October likely due to the floods.** Following an initial increase in prices at the end of March and beginning of April, prices stabilized by May until early October. Some of this spike was likely related to the increase of COVID-19 cases and subsequent border closures. Price fluctuations in October and November are likely a result of the floods.

The prices of mixed rice, duck egg, and snakehead fish remained stable from May to early October, but since then prices of mixed rice and duck egg have increased, while the price of snakehead fish has decreased. The price of vegetable oil decreased slightly in June and July but increased again from August to November. The price of morning glory has fluctuated since May, spiked following the floods in October, but sharply dropped by late November. Meanwhile, pork prices have had a slight upward trend since May until late September and then had a slight downward trend until late November.



## Monthly Food Price Change (October – November 2020)

**In November, prices were stable for key food commodities except vegetable prices, which showed a large downward trend** – including morning glory (-29.8%), Chinese flowering cabbage (-36.8%) and mustard greens (-29.5%) – after a substantial rise in October.

Prices of mixed rice, pork, snakehead fish, duck egg, vegetable oil and morning glory were higher in urban areas than in rural areas. Between the first and third weeks of November, prices for these commodities remained stable in both rural and urban areas, except morning glory, which declined in rural areas (-38.5%) and urban areas (-33.8%).

At provincial level, Koh Kong, Svay Rieng and Kampong Thom had the highest reported prices of some food commodities, such as mixed rice, snakehead fish and vegetable oil. Price information was not available in some remote and sparsely populated provinces.

Seasonal fluctuations in food prices are expected in the coming months due to the harvest of wet season paddy and start of the dry season.

## Conclusion:

In November, prices have remained fairly stable except for vegetables. The prices of vegetables decreased quite substantially after a price hike likely due to the floods in October. Prices of other key commodities remained within expected seasonal fluctuations. Markets also appear to be functioning well. So far, the impact of the COVID-19 pandemic and the recent floods on food security is more likely to come from the demand side, with many households suffering economically with a loss of livelihoods and income as a result of the crisis, which in turn restricts their ability to afford a sufficient and diverse basket of nutritious foods. In response, the Government has rolled out on-demand IDPoor nationwide and launched a cash transfer programme since June to provide support to IDPoor households. From 25 October to 24 November, about 674,000 IDPoor households received cash transfers, totaling an estimated 135.4 million USD since June. In addition, the Government has distributed paddy and vegetable seeds to farmers to restore agricultural crops affected by floods.

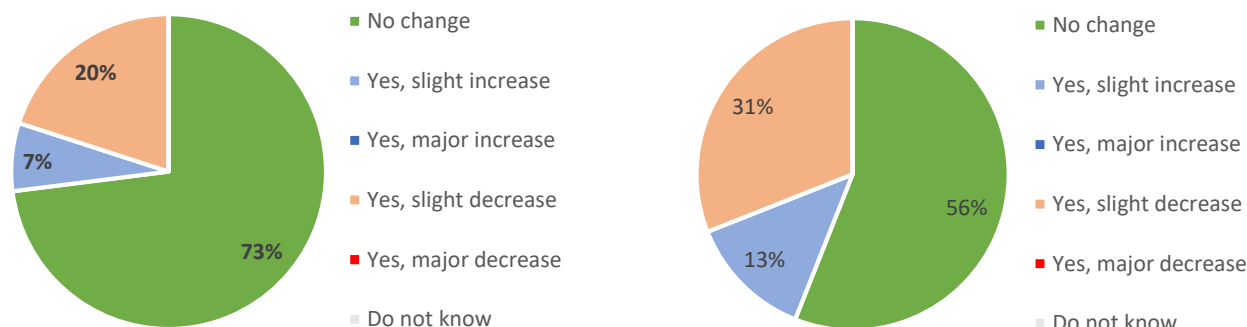
# Market functionality

In the 45 markets monitored across the country, market chiefs were interviewed in the first and third weeks of November\*. All respondents reported that markets were open, as usual.

Market chiefs reported changes in the number of customers visiting markets in the first and third weeks of November. In early November, 73% of market chiefs reported no change, 20% reported a slight decrease, and 7% reported a slight increase. However, in late November, 56% of market chiefs reported no change, 31% reported a slight decrease, and 13% reported a slight increase. These changes may be a result of several factors, including the large-scale flash floods in October and public holidays, which can affect demand.

In November, the majority of market chiefs (>90%) reported no issues with the food supply to their markets in the first and third weeks of November. In early November, 10% of market chiefs reported an increase in supply prices. However, this dropped to 4% of market chiefs in the third week of November.

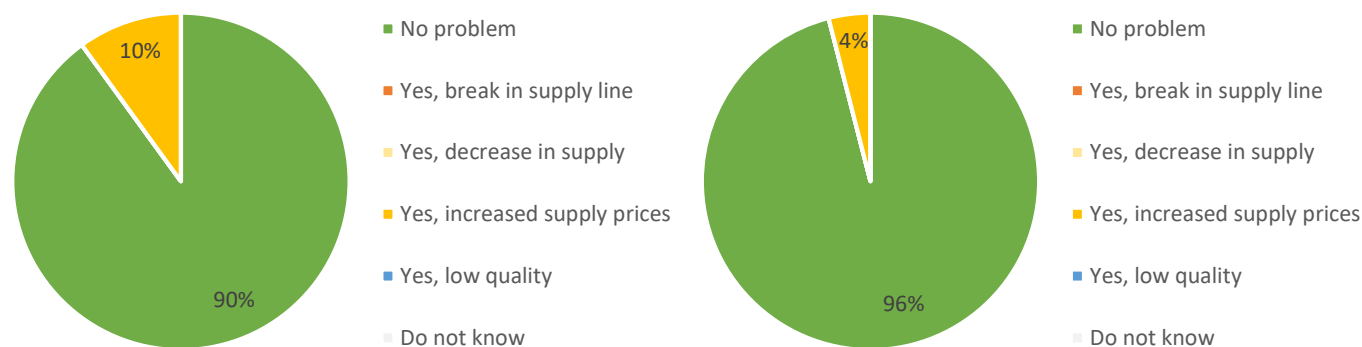
Change in Customers Visiting Markets in the Past 2 Weeks in November 2020



November 2020, Week 1 (n=15)

November 2020, Week 3 (n=16)

Change in Supply in the Past 2 Weeks in November 2020



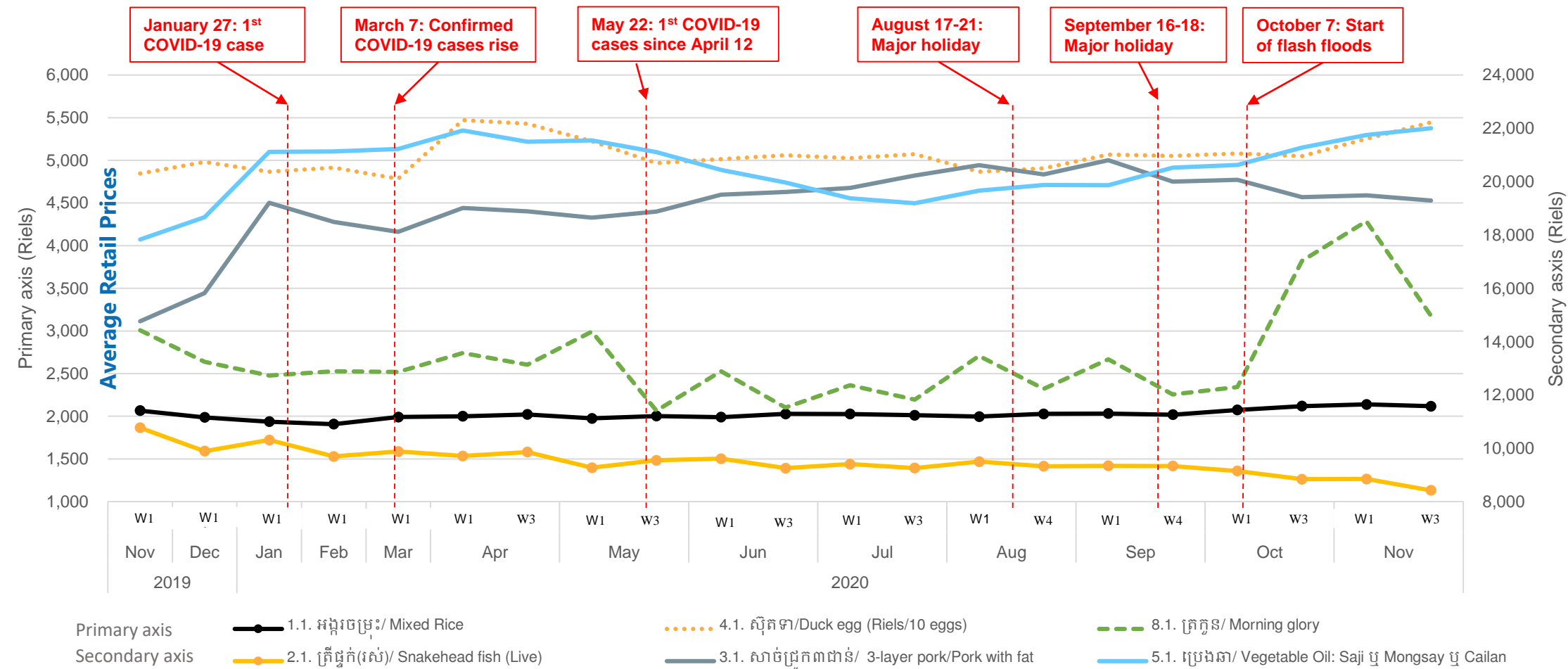
November 2020, Week 1 (n=15)

November 2020, Week 3 (n=16)

\*Call center operators contact and interview market chiefs during the first and third week of each month.

# National: Longer-term price trends

Longer-term trends of six commonly consumed food commodities (mixed rice, duck egg, morning glory\*\*, snakehead fish, pork and vegetable oil) in 14 urban and rural markets\*\*\* in 7 provinces (Battambang, Kampong Chhnang, Kampong Thom, Oddar Meanchay, Siem Reap, Preah Vihear and Stung Treng) indicate that after a slight spike in early April, prices have largely remained stable until early October when some prices started to fluctuate. The price of morning glory sharply increased in early November but sharply decreased at the end of November. The prices of duck egg and vegetable oil had an upward trend since late October, whereas the prices of mixed rice, pork and snakehead fish had a slight downward trend in the second half of November. Vegetable oil has seen a slight upward trend since late July. See Annex 1 and 2 for the prices of additional commodities.

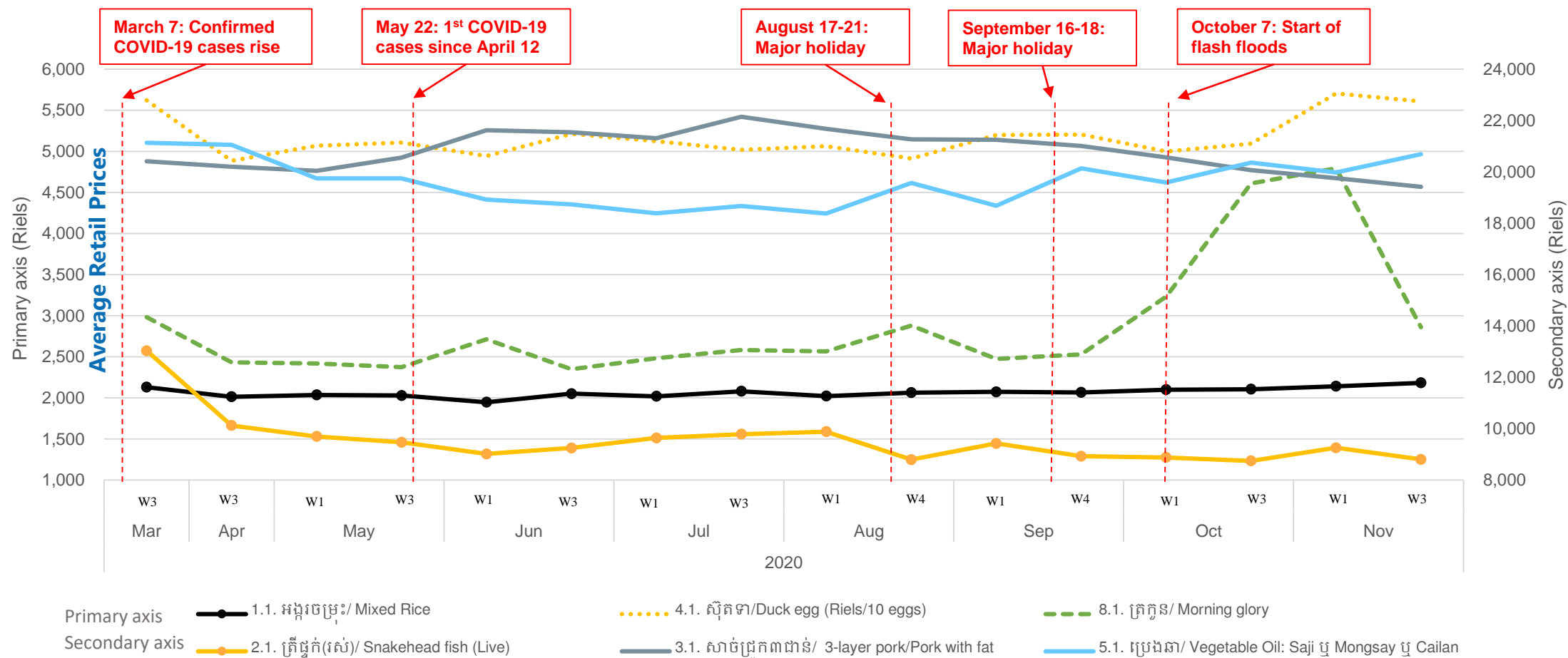


\*\* Morning glory is commonly eaten in Cambodia and its price trend does not always indicate price fluctuations of other vegetables in the Annexes.

\*\*\*Note: Data is from 14 markets that have been monitored since November 2019. See the Methods section for more details.

# National: Short-term price trends

Short-term trends of six commonly consumed food commodities (mixed rice, duck egg, morning glory\*\*, snakehead fish, pork and vegetable oil) in 31 urban and rural markets\*\*\*\* in 16 provinces (Banteay Meanchey, Kampong Cham, Tboung Khoum, Kampong Speu, Kampot, Kandal, Koh Kong, Preah Sihanouk, Kratie, Phnom Penh, Prey Veng, Pursat, Mondulakiri, Ratanakiri, Svay Rieng, and Takeo) indicate that most prices remained stable until early August and then showed some fluctuation. The price of morning glory rose in late September, peaked in early November and declined dramatically in late November. Duck egg and snakehead fish had a slight upward trend in early November but slightly decreased in late November. The price of pork with fat had a downward trend since late July through late November. The price of mixed rice showed a small upward trend since the end of October. Similarly, the price of vegetable oil increased in the second half of November. See Annex 1 and 2 for the prices of additional commodities.



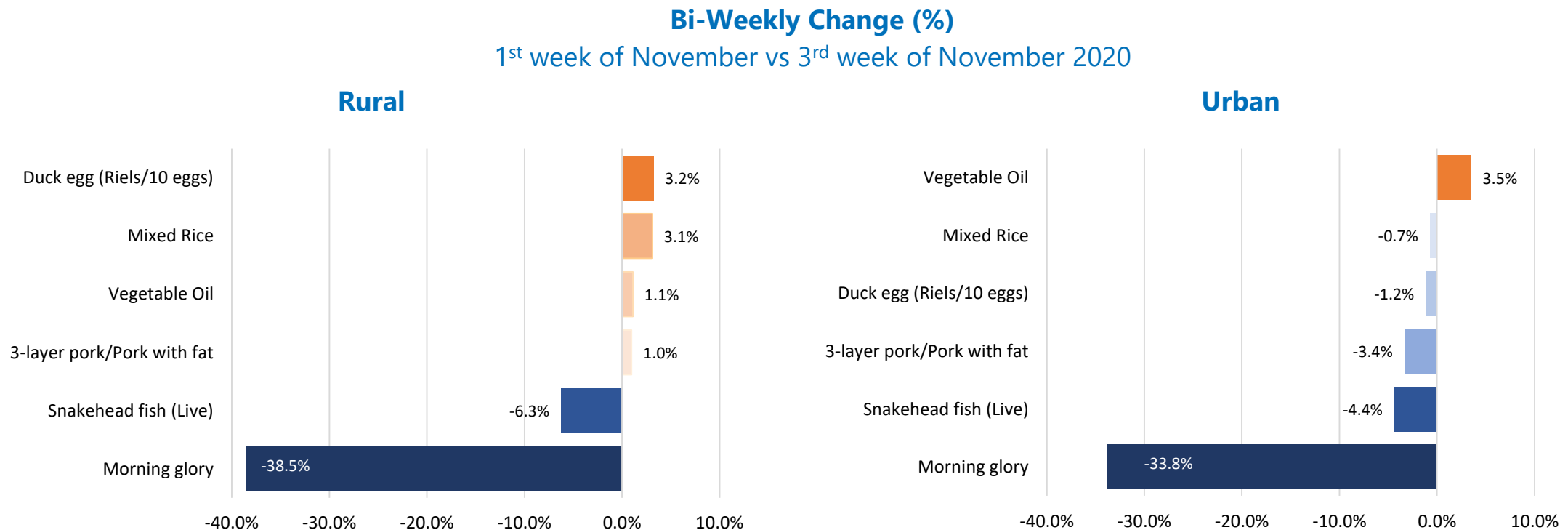
\*\* Morning glory is commonly eaten in Cambodia and its price trend does not always indicate price fluctuations of other vegetables in the Annexes.

\*\*\*\*Note: Data is from the expanded list of markets that have been monitored since March 2020. See the Methods section for more details.

## Sub-national: Price trends in urban and rural areas

In November, the average prices of mixed rice, pork with fat, snakehead fish, duck egg, vegetable oil and morning glory in urban areas were higher than in rural areas. Between the first and third weeks of November, the price trends of snakehead fish, morning glory and vegetable oil in rural and urban areas followed the same direction of change, with snakehead fish and morning glory prices decreasing but vegetable oil prices increasing. Morning glory had the largest fluctuation in price, showing sharp decreases in both rural (-38.5%) and urban (-33.8%) areas. Prices of snakehead fish decreased by 6.3% and 4.4% in rural and urban areas, respectively. In contrast, prices of vegetable oil in rural and urban areas increased by 1.1% and 3.5%, respectively.

The price trend of duck egg, mixed rice and pork was not consistent between rural and urban areas. Their prices increased in rural areas and decreased in urban areas. In rural areas, the prices of mixed rice, duck egg and pork slightly rose by 3.1%, 3.2% and 1.0%, respectively, while the prices of mixed rice, duck egg and pork dropped by 0.7%, 1.2% and 3.4% respectively in urban areas.



**Note:** Data is from all 45 markets. See the Methods section for more details.

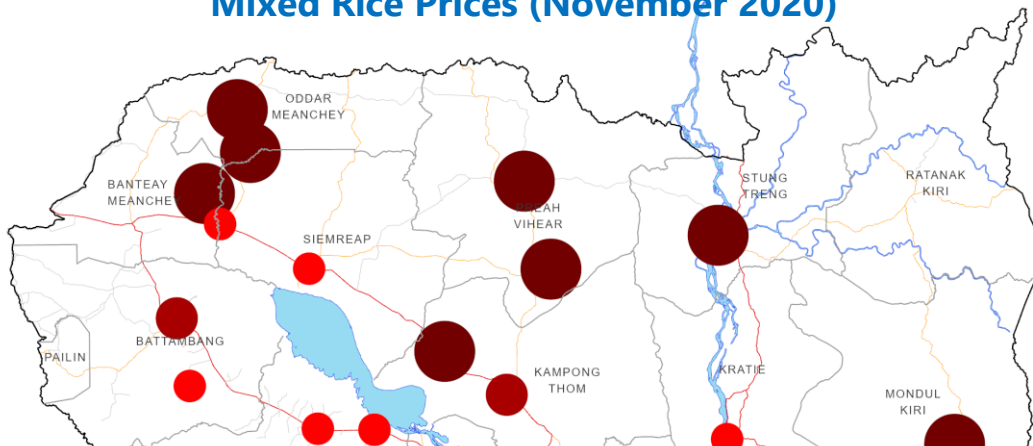


# Sub-national: Price trends of mixed rice & snakehead fish

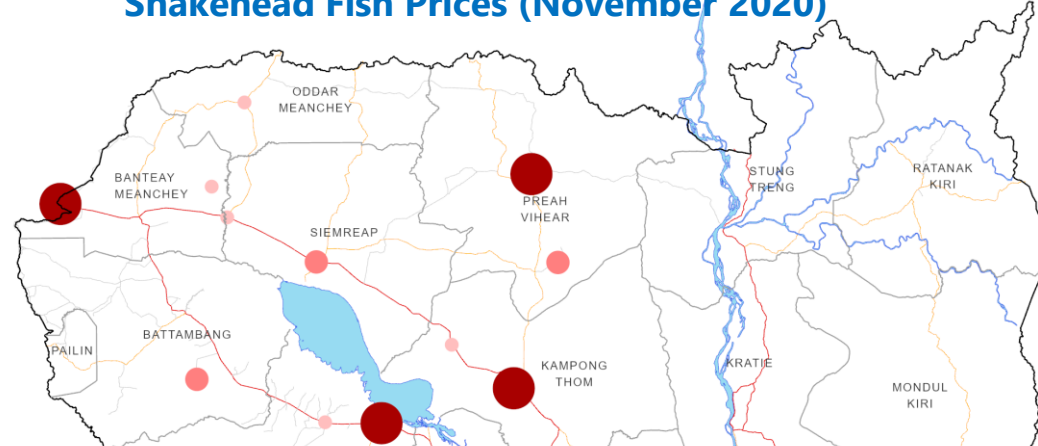
In late November 2020, the national average retail price of mixed rice was **2,149 riels/kg**. The highest price was 3,000 riels in Dang Tong, Koh Kong, 20% higher than the price in early October in the same market. The second highest price of rice was 2,500 riels in Phnom Srok, Banteay Meanchey (25% higher than late October) and Tom Leap, Takeo (14% higher than late October). The lowest price was in Suong, Tboung Khmum (1,900 riels), 3% higher than the previous month in the same market.

In late November 2020, the national average retail price of snakehead fish (live) was **8,654 riels/kg**. The highest price (11,000 riels) was found in Chi Pou, Svay Rieng, the same price as in late September (no price was recorded in October). The second highest price (10,000 riels) was found in multiple markets, such as Veal Yun, Svay Rieng (33% higher than late October), Krakor, Pursat (10% higher than late October), Dang Tong, Kampot (same as late October), Kampong Pranak, Preah Vihear (5% higher than late October), Kandal, Banteay Meanchey (same as late October), Veal Reanh, Preah Sihanouk (same as late October), and Kampong Thom, Kampong Thom (5% higher than early October). The lowest price (6,500 riels) was found in Sala 5, Kampong Chhnang.

**Mixed Rice Prices (November 2020)**



**Snakehead Fish Prices (November 2020)**



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