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Cambodia

Food price update - July 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 globe since the beginning of 2020. On 11 March, the World Health Organization (WHO) categorized it as a global pandemic. As of 31 July, according to WHO, there were more than 17 million reported cases and more than 668,000 deaths worldwide; in Cambodia, since the first reported case on 27 January, there have been a total of 234 cases and no deaths (as of 31 July).

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, including mixed rice, fish, vegetables and vegetable oil, 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.

The July update is based on market data collected in the first and third weeks of July 2020; additional information is as of 31 July.

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 Global Outlook

The COVID-19 pandemic has spread rapidly since January and continued to impact economic activities across the world. The global economic growth in 2020 is projected at 4.9%, 1.9% points below the April forecast (World Economic Outlook, June 2020). This is expected to also have major consequences on Cambodia. According to the World Bank, the economic growth for Cambodia is projected to slow to 2.5% in 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. Cambodia is a net rice exporter, so a reduction in demand and restrictions on exports may disrupt exports while helping to stabilize prices domestically. The Government ban on rice exports, put in place in early April, was lifted on 20 May to improve rice exports. Rice exports for the first 7 months of 2020 increased by **38.3%** compared to the same period last year.



Longer-Term Trend Analysis (Nov 2019 - July 2020)

In Cambodia prices have remained fairly stable for most key food commodities over the past 8 months.

Following an initial spike in prices at the end of March and beginning of April, particularly for vegetables (**up to +60%** for some items), duck eggs (**+14.5%**) and pork (**+5.7%**), prices stabilized by May. Some of this initial spike was likely related to the increase of COVID-19 cases and subsequent border closures which restricted cross-border trade. Since May key food items, such as mixed rice, snakehead fish, and duck eggs have remained stable, vegetable oil and morning glory have had a slight downward trend, and pork has had a slight upward trend for the last three months.

Markets have also continued to function well throughout this period.

At the end of July around two out of five (**38%**) market chiefs reported no change in customers visiting markets in the past two weeks, though **48%** reported a slight decrease, and **14%** reported a slight increase. Furthermore, nearly all market chiefs (**92%**) reported no problems in supply, although **3%** reported issues with the supply of food commodities due to price increases at their source or a decrease in supply.



Monthly Food Price Change (June- July 2020)

In July, prices appear to be stable for most commodities.

However, some commodities such as catfish (**+7%**) and some vegetables, such morning glory (**+9.3**) green papaya (**+23.6%**) and tomatoes (**+15.3%**) were found to have large fluctuations, but this is likely to be due to seasonal factors.

In rural and urban areas the price trends of key food commodities were not consistent, except for pork and rice, which minorly increased in price in both areas. Snakehead fish and morning glory showed the largest fluctuations in price, with both commodities showing large (>5%) increases in price from the first half of the month in rural areas but large decreases in urban areas.

At the provincial level on the whole, as expected, more remote, less populated provinces (see population density map in Annex 3), such as Koh Kong, and provinces in the North/North East, had higher prices of some food commodities, such as mixed rice, fish, eggs and vegetable oil.

Further seasonal fluctuations in food prices are expected in the coming months with the unusually slow onset of the rainy season this year (see Annex 3) and the dry conditions experienced in some provinces.

Conclusion:

Whilst there was a spike in retail food prices for some fresh commodities in late March/early April 2020, from May to July much of this fluctuation has reduced and prices have stabilized, keeping prices within expected seasonal changes for key commodities in Cambodia. Markets also appear on the whole to be functioning well, despite the reports of new cases in Cambodia between 22 May and 31 July. So far, the impact of the COVID-19 pandemic 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 launched a cash transfer programme to provide support to vulnerable households, reaching around 610,000 IDPoor households in July after its official launch in June 2020.

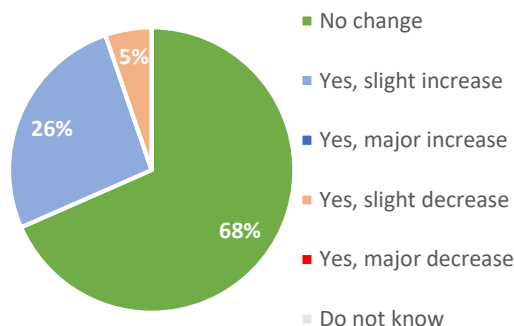
Market functionality

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

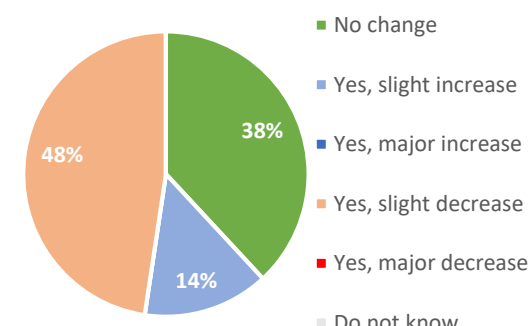
Overall, the number of customers visiting markets appears to have slightly increased in early July but then slightly decreased in late July. In late July nearly two out of five (38%) market chiefs reported no change in the number of customers visiting the market, while 48% reported a slight decrease, and 14% reported a slight increase. By comparison, in early July, more than one quarter (26%) of market chiefs reported a slight increase in the number of customers visiting the market, 68% reported no change, and only 5% reported a slight decrease.

Overall, the supply of food to markets appears to be good. In late July, 92% of the market chiefs reported no problem with the food supply to their market compared to 97% in early July. In late July, a small percentage of market chiefs reported having some market supply problems: 3% reported an increase in supply prices. A further 5% reported they didn't know the supply situation in their markets.

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

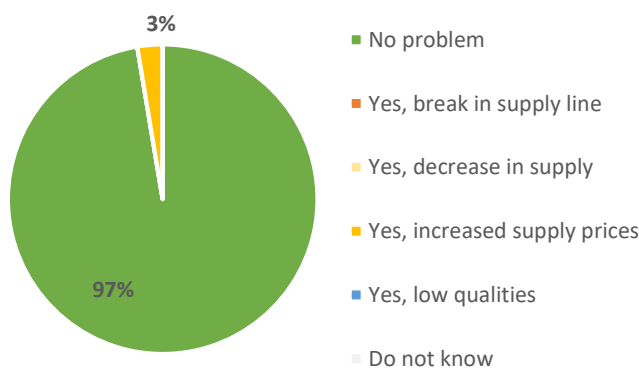


July 2020, Week 1 (n=19)

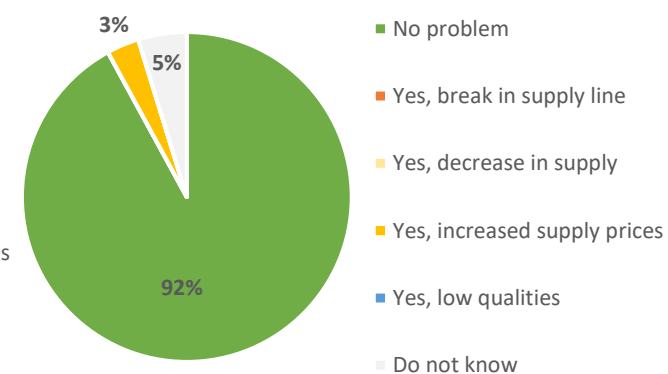


July 2020, Week 3 (n=21)

Change in Supply in the Past 2 Weeks in July 2020



July 2020, Week 1 (n=19)



July 2020, Week 3 (n=21)

*Call center operators were unable to contact all market chiefs during the data collection rounds.

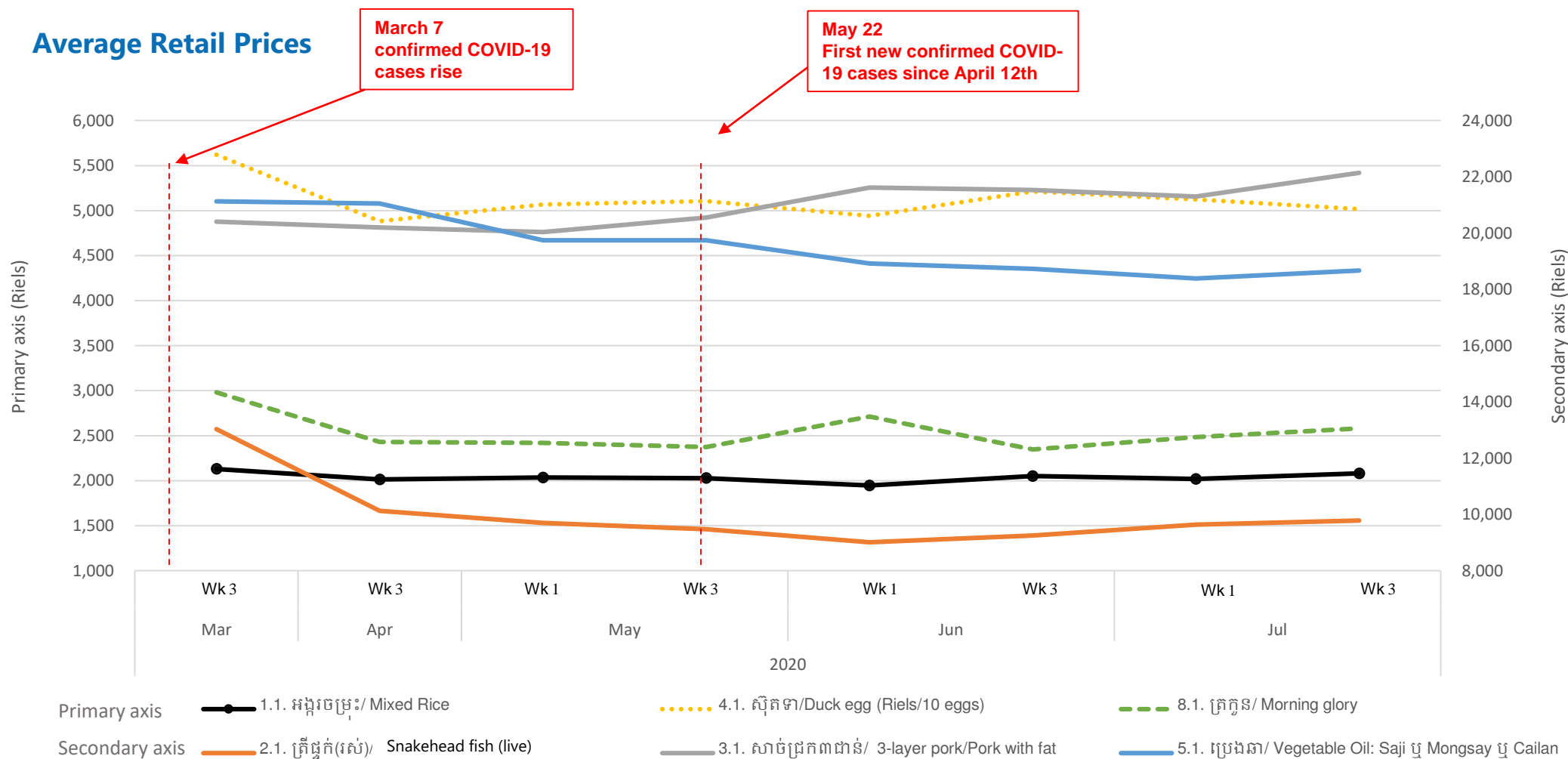
Average Retail Prices



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, Monduliri, Ratanakiri, Svay Rieng, and Takeo) indicate that most prices remained stable between the second half of April and late May and showed some minor fluctuation since June. In the second half of July, prices of mixed rice, snakehead fish, pork, morning glory and vegetable oil had an upward trend, whereas prices of duck eggs decreased. See Annex 1 & 2 for the prices of additional commodities.

Average Retail Prices



** 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.

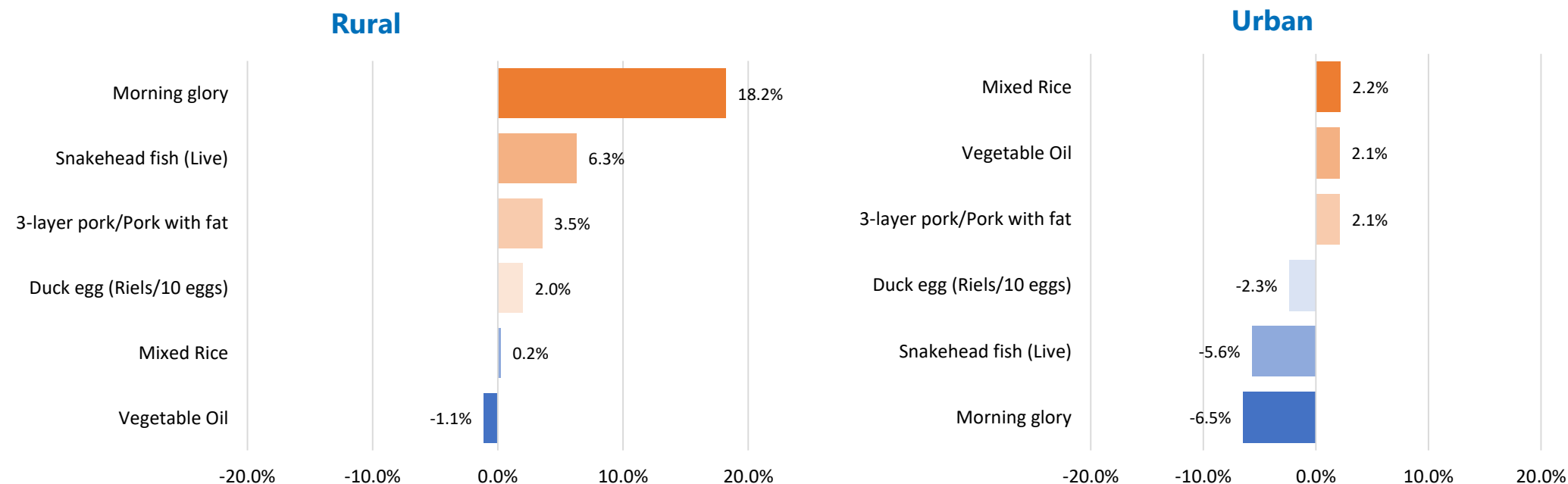
Sub-national: Price trends in urban and rural areas

In the third week of July, there were some differences in food price trends between rural and urban areas. For instance, the prices of mixed rice, snakehead fish, pork and morning glory were lower in rural areas than in urban areas, while the price of vegetable oil was higher in rural areas than in urban areas.

The price change of mixed rice and pork in rural and urban areas followed the same direction, while the price change of snakehead fish, duck egg, morning glory and vegetable oil was not consistent between rural and urban areas. Snakehead fish and morning glory showed the largest fluctuations in price, with both commodities showing large (>5%) increases in price from the first half of the month in rural areas but large decreases in urban areas.

Between the first and third weeks of July, the price of mixed rice increased by 0.2% in rural areas and 2.2% in urban areas and the price of pork rose by 3.5% and 2.1% in rural and urban areas, respectively. In contrast, the price of morning glory increased significantly (+18.2%) in rural areas but decreased by 6.5% in urban areas. Prices of snakehead fish and duck egg increased by 6.3% and 2% respectively in rural areas, while in urban areas decreased by 5.6% and 2.3%. Prices of vegetable oil decreased by 1.1% in rural areas, but it increased by 2.1% in urban areas.

Bi-Weekly Change (%)
1st week of July vs 3rd week of July 2020



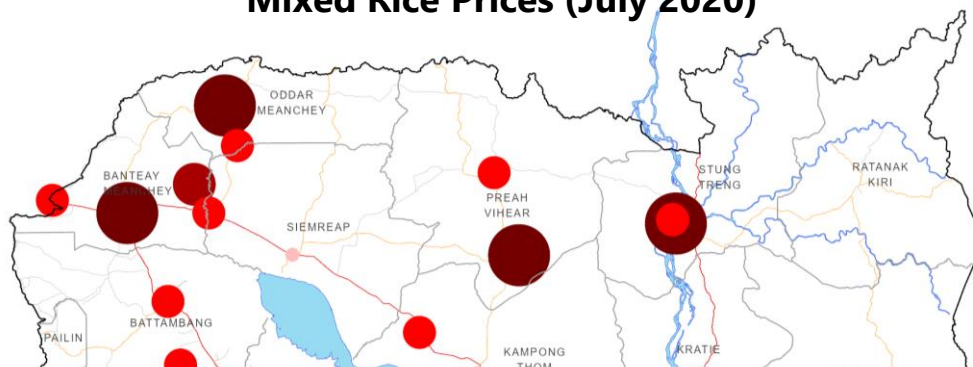
Note: Data is from all 45 markets. See the Methods section for more details.

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

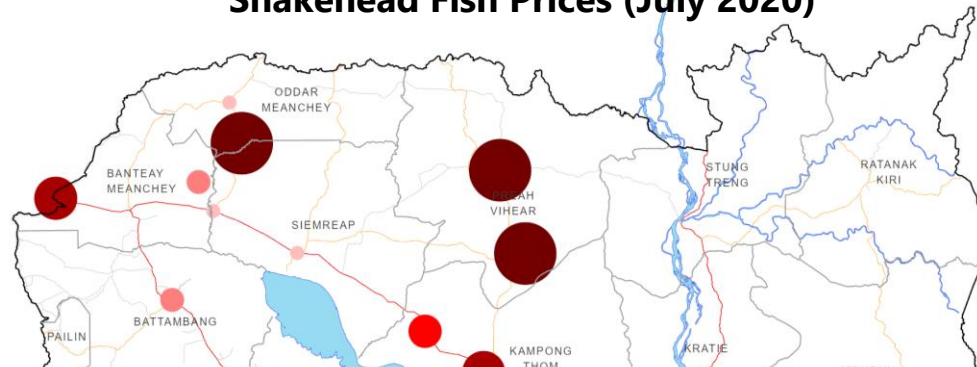
In late July 2020, the national average retail price of mixed rice was **2,052 riels/kg**. Serei Saophoan market in Banteay Meanchey and Tar Khmao market in Kandal reported the highest average retail rice price (2,700 riels). The price at Serei Saophoan market remained the same as the price at the end of June while the price at Tar Khmao market significantly increased from last month (2,263 riels). The second highest price of rice (2,300 riels) was in Rovieng market in Preah Vihear, which remained the same as it was at the end of June, and Samrong market in Oddar Meanchey, which increased from the previous month. The lowest price in late July was in Pa Oav market in Kampong Cham (1,700 riels), which slightly decreased from the end of June and early July.

In late July 2020, the national average retail price of snakehead fish (live) was **9,533 riels/kg**. The highest price was in Dang Tong market in Koh Kong (12,500 riels), but this price was lower than at the end of June. The second highest price was in Rovieng market in Preah Vihear (12,000 riels), and this has remained stable since late June. But the price in Chong Kal market in Oddar Meanchey was increased from 10,000 riels last month to 12,000 riels this month. The lowest price was in Psa Leu market in Siem Reap (7,000 riels), which was significantly lower than the price at the end of June.

Mixed Rice Prices (July 2020)



Snakehead Fish Prices (July 2020)



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https://www.yunbaogao.cn/report/index/report?reportId=5_3282

