



SECTOR BRIEF CAMBODIA: Organic Market



Summary

Cambodia's organic agriculture sector, whilst having experienced rapid development over the last decade, is still at a relatively small scale compared to its overall market potential. Over the past 10 years the production area under certified organic agriculture has increased by 218.6%. Cereals, i.e. mainly rice production, covers almost all of that area (92%), with other crops consisting of pepper, cashews, fruits, herbs and other vegetables.

The competitive advantages of the Cambodian organic sector include its low land costs, low labour costs and limited use of agrichemicals, the latter meaning that three-year resting periods when switching from conventional to organic farming (as are often required by organic standards) are not always necessary. Furthermore, Cambodian crops are also renowned for their high quality.

The establishment and early growth of the organic sector has been reliant on foreign donor support to strengthen the capacity of farmers, related government authorities and other stakeholders. The most widely used organic certification schemes in Cambodia are the United States Department of Agriculture National Organic Program (USDA NOP) and European Union (EU) Organic, reflecting the main markets to which organic products are exported – the USA and the EU.

The main business opportunities in Cambodia's organic agriculture sector include the supply of machinery, equipment and technology; improved (organic) agricultural inputs (e.g., seeds, fertilizers, pest control products); expertise related to organic standards and auditing; and direct importing of niche agricultural products.

The organic agricultural sector in Cambodia

The origins of Cambodia's organic market

After the thirty years of civil war, Cambodia mainly relied on subsistence farming, with rice being the major crop for self-consumption. In recent years the 'value chain' has become more important, with the international development sector seeking to add value to products throughout the supply chain. Since then, organic certification and products have become more prominent, due to the market premium that certified organic products can command.

The onset of Cambodia's organic market started in the year 2000 with the implementation of the System for Rice Intensification (SRI) which was eventually included in the National Strategic Development Plans (NSDP) 2006–2010 and 2009–2013. Supported by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, the system promoted several good agricultural practices, including for example the use of more ecologically benign alternatives for pesticides, using less water when levelling fields and seeding, and other more environmentally sensitive cultivation practices. It did, however, also steer practices towards farming with limited external inputs.

Competition in the region

Cambodian agriculture faces stiff competition from neighboring countries such as Thailand and Vietnam which also produce large quantities of agricultural products, particularly rice (organic and

non-organic). This competition is intensified by the relatively high production costs arising from Cambodia's underdeveloped infrastructure, resulting in comparatively higher costs for transportation and electricity. The Asian Development Bank (ADB) estimated that road transport costs in Cambodia in 2015 were around USD10 to USD13 per 100km per ton, compared to around USD7 in Vietnam and only USD5 in Thailand. One rice miller interviewed in the context of this study estimated that electricity and transportation increase Cambodia's production costs by 15 to 20%.

Despite the above, Cambodia remains attractive as a country for organic production for the following key reasons:

- The costs of land and labor in Cambodia are relatively low.
- Cambodia's agricultural production area is still comparatively free of contamination by agrochemicals. Therefore switching from conventional to organic agriculture can be achieved quickly, without the three-year transition period normally required by several certification programs.
- Cambodia is famous for the high quality of its agricultural products, such as its award-winning fragrant varieties as well as crops including pepper, cashews and moringa.

Combining local high-quality crops with organic agriculture practices in Cambodia enables a premium price to be obtained in Germany, the EU, USA and other markets with high end-consumer awareness. Those premiums help to compensate the higher production costs associated with Cambodian agriculture, making it easier to compete with its neighboring countries.

Growth in Cambodia's organic sector

Consumer awareness in Cambodia regarding organic agriculture is growing, as indicated by the increase of shops and supermarkets that sell organic products. However, claims of 'organic' or 'natural' standards are not always underpinned by any formal organic certification. The 'natural' self-image is based on the usually extensive form of agriculture practiced in Cambodia that uses low inputs of pesticides and other chemicals on larger areas, in contrast to the more intensive practices in countries such Thailand and Vietnam where high inputs are used on smaller areas.

In 2019, only 0.5% of Cambodian farmland was certified as organic, amounting to approximately 25,757 ha. By comparison in Thailand, for example, almost 0.9% of farmland was certified organic whilst in countries with well-established organic sectors such as Germany the proportion is around 9% (IFOAM, 2021, see Table 1).

Whilst the data appears to show a slight decline in the area under organic certification from 2018 to 2019, this is likely due to a small number of operators (with significant farmed areas, from 1,000 to 2,000 ha) ceasing their operations in Cambodia. Despite this, the certified organic area has increased by 218.6% over the last decade. Exports to the EU also increased over that same time period (2018–2019). Data for 2020 and 2021 is not available yet. As of March 2022, an area of 2,417 ha is maintained under organic certification by Control Union Cambodia.

Table 1: Cambodia organic Sector Statistics

2018 – organic area (ha)	27,550
2019 – organic area (ha)	25,757
2019 – organic cereals (ha) (mainly rice and maize)	23,858
Growth (2018 to 2019)	– 6.5%
10 year growth to 2019	218.6%
Share of total farmland (2019)	0.5%
Number of producers (2019)	6,360

The main importers of organic products from Cambodia are the EU (which imported 9,480 tons in 2019, mostly going to Germany), the USA and Japan. Japan is a growing market, with the first Japanese Agricultural Organic Standard (JAS) certification projects having been implemented in 2020/2021.

The extent of China's imports of organic products from Cambodia is more challenging to estimate. Given that approximately 50% of Cambodian rice is exported to China, coupled with China's increasing interest in organic products, it can be expected that a substantial proportion of Cambodian organic products are exported to China.

Table 2: Cambodian Exports to the EU

2018 – organic produce (ton)	8,553
2019 – organic produce (ton)	9,480
Share of total imports of Organic produce into EU	0.3%
Change in organic produce exported to EU 2018–2019	10.8%

International certification programs and certification bodies

The two dominant certification schemes for organic products in Cambodia are USDA NOP and EU Organic, reflecting the export volumes to those two markets (both only accessible through certification). The JAS is a relative newcomer to the Cambodian market with only three projects so far certified.

Table 3: Certification program

Certification program	Projects
USDA NOP	66
EU Organic	46
JAS	3

A fourth certification program gaining popularity in Cambodia is the China National Organic Product Standard, although data on the extent of its adoption is difficult to obtain.

While largely similar in purpose, the mentioned standards have differences in application – for instance the types and quantities of chemicals permitted, with EU Organic being more rigorous than USDA and JAS.

The Certification Bodies (CBs) in Cambodia that can support organic certification and training include:

- EcoCert (French)
- Control Union (Dutch)
- Ceres (German)
- Kiwa (Dutch)

Domestic accreditation and certification

Besides the CBs mentioned above, Cambodia established its only domestic certification body – the Cambodian Organic Agriculture Association (COAA) – as part of a development initiative in 2006. At present, however, COAA organic certificates are not officially recognized internationally and the certification model is not yet self-sustaining.

In order to help stimulate the domestic market, the Cambodian government introduced an organic agricultural policy in April 2019 with rules and a logo to identify locally produced certified organic vegetables. This initiative has however encountered some concerns relating to its credibility.

Participatory Guarantee Systems (PGS) are often used as a cheaper alternative to third party certification. In such a system, regular self-assessments are conducted by farmers or other involved stakeholders to check compliance to specific standards. The credibility of these claims is often lower and they do not have to address organic practices per se.

Crops under organic certification

With a total share of 92%, the area under organic certification in Cambodia is dominated by cereals. The largest proportion of this is likely to be rice, the most widely produced cereal in Cambodia. Other crops that are certified include pepper, cashews, herbs, fruits and cassava as illustrated in Table 4 for USDA NOP.

Rice	10
Pepper	15
Cashew	5
Herbs (e.g. ginger, lemongrass)	9
Fruit	5
Others (Vegetables/cassava/others)	10

Table 4 presents the number of *projects* that included the mentioned crop in their certification scope and successfully attained USDA NOP certification from 2005 until now. It does not indicate

the area of land or number of farms that are (group) certified. As such, whilst the number of ‘rice’ and ‘pepper’ projects in Tables 4 (USDA NOP) and 5 (EU Organic) are the same or similar, the total land area occupied by certified organic rice is significantly larger than for organic pepper, since rice is by far the largest single type of crop to be certified (see Table 1).

Table 5*: EU Organic (as of 01-2022)

Rice	14
Pepper	18
Cashew	6
Herbs (e.g. ginger, lemongrass)	9
Fruit	5
Others (Vegetables/cassava/others)	10

* Based on data from Control Union and EcoCert

High level strategic agricultural policies

Cambodia’s agricultural sector as a whole is a vital pillar of the national economy, accounting for 41.5% of total employment. In its “Rectangular Strategy – Phase 4”, the Royal Government of Cambodia aims to grow the agricultural sector by 5% per year through diversification, modernization, increasing productivity and improving sustainability. The ultimate goal is to increase the share of processed exports to 12% by 2025. Both of these goals include organic agriculture, though no specific sub-targets have been set.

The two pieces of policy that further outline this strategy are the ‘*Master plan for Agriculture sector development towards 2030*’ and the ‘*Agriculture sector strategic development plan 2019–2023*’. Whilst these ambitious plans focus mainly on sustainability, similar to the “Rectangular Strategy – Phase 4” they do not explicitly address organic agriculture.

Government programs specific to organic agriculture

Activities related to organic agriculture are mainly coordinated by the Department of Horticulture and Subsidiary Crops within the Ministry of Agriculture, Forestry and Fisheries (MAFF). However, at present organic agriculture is not a key priority. The most recent development was the finalization of the organic Agriculture



Organic rice ready for harvest

Regulation signed by the ministry on 16 April 2019. The roll-out of this legislation however has been slowed by the COVID-19 pandemic and ensuing budget cuts, increasing the importance of donor support. Together with the Swiss Agency for Development and Cooperation (SDC), the government plans to support farmers with the implementation of organic agricultural practices.

International donor support

Most international donors still focus mainly on rural development and issues related to climate change, water management and agro-processing. The main donors active in these fields include Australian Aid, USAID, Japan International Cooperation Agency (JICA), and GIZ.

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is a global service provider in the field of international cooperation for sustainable development and international education work. As a public-benefit federal enterprise, GIZ supports the German Government – in particular the Federal Ministry for Economic Cooperation and Development (BMZ).

In addition to rural development, GIZ has been implementing projects focusing on organic agriculture. For example, *Improving Livelihoods and Food Security* (ILF II) has supported Cambodian farmers in obtaining organic certification (EU and USA) since 2018. Upon realizing the potential of local organic agriculture, the program began to act as an intermediary between certification bodies and agricultural cooperatives (ACs) to support organic group certification of approximately 400 local farmers so far, including the provision of trainings. In some cases, financial support for certification has been provided to cooperatives as well.

An instrument for the private sector that foresees close cooperation with locally implemented GIZ projects such as ILF II is the develoPPP program funded by the German BMZ. As part of the program, several private companies are cooperating with GIZ in Cambodia to source and implement organic production in Cambodia, taking advantage of the local high-quality products. The develoPPP program is designed to support companies to invest sustainably in developing and emerging countries if the business objective also generates sustainable benefits for the local population. Support is given both technically and financially, and costs are shared between BMZ and the private company up to 50% of the total expenditure.

International trade

Table 6 shows the export volumes of different Cambodian agricultural products to Germany and the EU which are relevant to the organic market. Note that these volumes include both organic and non-organic products, as numbers for specifically organic products are unavailable. Rice is the major crop being exported to both the EU27 (excluding the UK) and Germany, although the volumes have been decreasing substantially in recent years, due to the reinstatement of EU tariffs on rice imports.

Pepper is not targeted by any tariffs and constitutes the main herb being exported from Cambodia to the EU – mainly to Germany

develoPPP for organic agriculture

ThaiWah, a Thai tapioca, vermicelli and noodle manufacturer, and Amru Rice Cambodia, a producer, processor and exporter of organic rice, were among the first companies to develop a develoPPP project. Main crops included in this project were cassava and rice.

Since then new projects have been added and the program has expanded to new crops including sesame, cashews and different herbs. At this moment, a new develoPPP project is being developed with Intersnack, an international operating company in the Cashew nut sector. Most of these projects engage and source their raw materials from smallholder farmers.

A key challenge facing these projects is the cost of third-party certification, which eventually needs to be covered by the farmers themselves. The efforts made by GIZ's ILF II project to support agricultural cooperatives in attaining group certification are thus crucial. The first project is expected to function without the need for external funding in 2022.

itself with minor other importers being France, the Netherlands, and Belgium. In 2020, over 95% of the volume of herbs exported to the EU27 were pepper, with more than 92% being exported to Germany. These exports have seen a substantial increase in volume in recent years.

An important crop absent from the list below is cashew, which is mostly exported to the EU27 indirectly from Cambodia through Vietnam and to some extent Thailand. So far Cambodia is not exporting fresh fruits to the EU27 due to the distance, though exports of dried fruits like mango are slowly increasing.

Importing to and exporting from Cambodia

Exports to the EU or Germany can leave the country either through the sea port at Sihanoukville, the port of Phnom Penh, or the airport of Phnom Penh. A fourth possible way is through Vietnam or Thailand, where products are then exported to other destinations by Thai or Vietnamese traders and processors. Unfortunately, not all products are brought across the borders legally.

Since Cambodia is classified as a Least Developed Country (LDC) it has an 'Everything But Arms' (EBA) agreement with the European Union. This enables Cambodia to export any goods except armaments to the EU duty and quota-free, though the exemption was partially withdrawn for a number of goods, including rice.

Cambodia has yet to develop much of its own food and agricultural regulations. Currently most of its food safety regulations are based on the CODEX Alimentarius standards adopted by a commission of the Joint FAO/WHO Food Standards Programme and are harmonized with the standards from the ASEAN region.

Table 6*: Export volumes to EU (t)					
TONs RICE exported (HS 1006)	2016	2017	2018	2019	2020
to Germany	81,533	57,278	35,752	14,109	11,701
to EU27	308,782	258,174	233,215	195,251	196,978
TONs PEPPER exported (HS 0904)					
to Germany	45	355	230	1,071	1,135
to EU27	66	382	394	1,155	1,224
TONs HERBS exported (HS 09)					
to Germany	45	355	230	1,071	1,136
to EU27	67	405	432	1,210	1,277

*obtained from Access2markets

Business opportunities

Opportunities in the Cambodian agricultural sector are closely linked to the policies set forth by the Cambodian government to promote modernization, mechanization, diversification and export growth. They can be divided into the three areas: exporting, sourcing, and investing:

Exporting to Cambodia

Agricultural inputs

Seeds in general remain of low quality in Cambodia, mainly due to the lack of investment in seed research and price fluctuations in rice that inhibit farmers' ability to obtain seeds.

Over two thirds of farmers still use local rice seed varieties and, sporadically, varieties from Thailand and Vietnam. Whilst the supply of quality rice seeds from private companies, cooperatives and the government increased by a factor of nine from 2015 to 2019 (from 9,000 tons to 79,200 tons), this still amounts to only 20% of total demand. Some quality seeds are also imported by land, however, no statistics are available for this and the quantities are estimated to be comparatively small.

For crops such as cassava, corn and cashews, seed is often imported, indicating a lack of research into and availability of suitable Cambodian varieties. Opportunities therefore lie in supporting the development of local varieties, especially for crops other than rice.

Organic input materials, i.e. fertilizers, seeds and pest control, are not widely available, with only three main companies – Ecofit, Angkor Green and Agrotech – distributing them with little or no advice provided on the use, suitability and application of those materials. This also provides an opportunity to support farms not only with the supply of suitable input materials but also with advice on their usage.

Testing and quality norms

Suitable laboratories for food safety analyses for both conventional and organic farms are not sufficiently available. There are only two laboratories with ISO 17025 certification from SGS and Intertek but they focus on textile, not food safety or chemicals. The latter is especially important for organic certification since products need to be tested to prove no pesticide is present. Currently most of those samples are sent to either Thailand or Vietnam for analyses. Another laboratory that provides testing in Cambodia is the Institut Pasteur du Cambodge (IPC), however, their core-business is related to viruses and diseases, not food safety. Companies could take advantage of supplying the sector with adequate machinery needed to conduct the required food safety analyses or with support in capacity building to obtain required accreditations.

Technical assistance to producers is needed to support efforts for organic certification, but also for basic food safety (ISO 22000) and quality management (ISO 9001). Opportunities include the provision of advice, training and support for the farmers in addition to the CBs that perform the certification audits. Partnering with German development cooperation programs such as develoPPP holds great potential especially in this area.



Drying rice after harvest

Machinery

Throughout the agricultural production process, machinery is increasingly being used and is almost always imported. The government supports a more mechanized agriculture to enhance efficiency, increase production, reduce costs and prepare for expected long term shortages in labor.

The types of machinery used on farms depend heavily on the type of farm and its resources. Tractors are common on medium to large sized farms in provinces such as Banteay Meanchey, Battambang and Pailin and typically for land preparation activities in upland crops (maize and cassava). In Southern Cambodia, in regions where dry season rice is cultivated, tractor use is increasing.

With respect to irrigation, farmers are using more low-lift water pumps to irrigate rice fields using power tillers to drive the pump engines. This is mainly practiced in provinces around the Tonle Sap lake. Closer to Phnom Penh, centrifugal pumps are used more often. Overall, manual tractors are still commonly used in rice and vegetable production.

For German and EU companies this provides an opportunity to support farmers with irrigation solutions and farm machinery that would help them to cultivate their fields more effectively.



No-till planting of cover crops in Kratie Province

Sourcing from Cambodia

Cambodia's crops – in particular niche organic crops like pepper, cashews, moringa, mango, banana and palm sugar – are famous for their quality. However, Cambodia's main trading partners are Vietnam and Thailand, with many Cambodian products often exported via those countries. Since much of these exports occur informally and are not included in official figures, actual volumes of Cambodian agricultural exports are likely to be much higher than officially registered.

For European buyers and processors various agricultural products therefore may present business opportunities for direct sourcing, especially those products that cannot be grown in the EU.



Organic cashew plantation

Cashews

Cambodia is one of the top ten producers worldwide and possesses optimal growing conditions for high quality cashew nuts. Cambodian harvest times do not coincide with those of other producing countries, smallholder cashew farmers are relatively large compared to neighboring countries, and their yield is also relatively high.

Almost all of Cambodia's cashew production is exported raw and without any processing. During the first six months of 2021, most cashews were exported to Vietnam, the official figure being 85%, although it is known that not all export is officially declared. Much smaller volumes are exported to China, Thailand and, starting in 2021, to Japan. Exports of cashews to Germany and the EU are also very low in volume.

Cashew processing presents opportunities for instance in the shelling industry, where markets even with much smaller cashew production volumes are able to sustain such industries. Furthermore, according to the interviews conducted with CBs, the facilities in Vietnam where most Cambodian cashews are processed are old and in need of modernization. This presents an opportunity to invest in new organic processing plants within Cambodia itself.

Kampot pepper

Kampot pepper is a prized premium quality product from Cambodia that has been recognized through the status of protected geographical indication by the World Trade Organisation (WTO) since 2010 and the EU since 2016. The production of the Kampot pepper is restricted to six districts within the Kampot and Kep provinces, where ideal growing conditions provide the Kampot pepper's unique taste.

The main export markets for Cambodian pepper include Vietnam and to a lesser extent Germany and other EU countries, as well as India and China.

As seen from Tables 4 and 5, many certification projects include pepper as an organic crop to take advantage of the high price premiums associated with an organic status. The following textbox provides an example of a company that has seized this opportunity and exports pepper to Germany.

The Pepper Hill and Kamy Eco-Farming

The Pepper Hill and Kamy Eco-Farming were amongst the first companies to recognize the value of organic certification for several crops including Kampot Pepper in Cambodia, citing the possibility to start farming in a clean environment (reducing the three-year organic transition period) and the good quality of Cambodian agricultural products as important reasons to invest. Their farms mainly produce the organic 'super food' Moringa Olivera targeted at the domestic market as well as organic Kampot Pepper for export to Germany. Kamy has also expanded into organic cashews.

Although skilled labor, transport and transaction costs are comparatively high, proper certification in combination with the high-quality and good reputation of products results in a sufficient profit margin that enables the farming companies to be competitive with products from other countries. For the Kampot Pepper they have also benefited from its status as Protected Geographical Indication, first assigned in 2010, which acknowledges the Kampot Pepper's exceptional quality.

Investing in Agro-processing

Post-harvest handling and processing within Cambodia is very limited, with processed agricultural exports making up only 8% of Cambodia's total export value.

Cambodia lacks a stable or significant supply chain capacity. Other than a few large-scale enterprises, most production is characterized by low value addition and low levels of technology application. Key challenges for the processing sector include the reliability and cost of electricity, obtaining development capital and access to technology and machinery. Only basic processing is done for rice, pepper and rubber, and only few companies are engaged in further

processing for e.g. convenience foods, mainly producing bread, fruit drinks, dried fruit, syrups, sauces, cakes and ice making. Opportunities therefore lie in the development of processing facilities in, for example, the cashew supply chain (see *Cashews* above).

The potential for Agro-processing to contribute to the GDP is now more widely recognized, resulting in the government having identified a number of developmental needs which include trade facilitation, industrial standards and better property right protection. These developments make it more viable for German and European Agro-businesses to invest in their own processing facilities within Cambodia.

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“New Markets – New Opportunities: A Guide for German Companies” is supported by the Federal Ministry for Economic Cooperation and Development (BMZ). All issues are published on the websites of GTAI and GIZ. You can find selected issues also at

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Published by



In Cooperation with



Published by

Deutsche Gesellschaft für
Internationale Zusammenarbeit (GIZ) GmbH

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Layout

EYES-OPEN, Berlin

Photo credit

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As at

Eschborn, May 2022

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