CONSUMER SURVEY ON FOOD STANDARDS

in ASEAN

Contents

1. Background

1.1. Food safety is an important topic for several countries in the ASEAN (Association of South East Asian Nations) region for a multitude of reasons. Tropical climate, high population densities, urbanization combined with constructive expansion resulting in severe problems of air, soil and water pollution make these countries particularly vulnerable to food safety scares. According to the World Health Organization (WHO), a large number of food-borne diseases remain widely prevalent in most ASEAN Member States. An estimated 5 billion cases of diarrhea were reported in children 5 years and above at the global level of which 3.2 billion cases were reported from South-East Asia each year. Food-borne and other infectious enteric diseases had increasingly affected people's health and well being and also had economic impacts on the individuals, communities and countries. As a result, consumers are growing highly concerned and vigilant about the provenance and quality of foods they consume, especially in the context of rising disposable income and complex market situations with a wide range of products being supplied every day.

1.2. For many of these countries, in particular the CLMV (Cambodia, Lao PDR, Myanmar and Vietnam), the agricultural and food-processing sector also means an important source of livelihoods for the majority of population, and a leading export sector bringing in the much-needed cash for the overall economy. Ensuring that their agricultural and food products are able to meet the strict food safety requirements and consumer preferences of key import markets is therefore of tantamount importance to food producers, processors, traders and farmers in ASEAN. Not only safety, consumers are increasingly demanding for sustainably-produced foods, environmental protection, fair trade, and ethical use of labor.

1.3. Unfortunately, in several ASEAN countries, also especially the CLMV, the consumer protection systems, not least for maintaining food safety, are still at a nascent stage. Even though most have adopted generic consumer protection laws and specific food safety laws, enforcement capacities remain inadequate. Resource constraints, in addition, make it impossible to undertake *ex ante* testing and control across the board. As a result, these countries often have to rely on *ex post* monitoring, i.e. intervening only when food safety incidents have already happened and got widely reported, thus undermining consumer's trust and confidence in the market.

1.4. Much then is dependent on promoting industry voluntary actions such as compliance with international standards, risk management throughout the production chain (from farm to table), or other sustainable and ethical business conducts and practices. Equally important is the need to build consumer awareness with regards to identifying, choosing and consuming safe foods, to protect their own health. Consumers should also be educated to be able to search for relevant information, recognize and accept standards, read labels and logos, and report food safety incidents upon seeing them.

1.5. In this context, Consumers International was commissioned to carry out a consumer survey on behalf of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, in coordination with the Cambodian Institute for Research and Rural Development (CIRD), the Myanmar Consumers Union (MCU), and the Vietnam Consumers and Standards Association (VINASTAS) as country partners. This report presents the key findings from the survey.

1.6. ***Aims and Objectives***: The survey was aimed at evaluating consumer awareness, knowledge, attitude and perception (AKAP) on organic and GAP (Good Agricultural

Practices) certified products in ASEAN, expectedly to build the foundation for future consumer awareness activities in the region.

The following objectives guided the study:

- To identify consumers AKAP towards organic and GAP certified food products and the different verification systems in the 3 ASEAN markets, namely Vietnam, Cambodia and Myanmar;
- To guide future awareness raising, advocacy and marketing activities of organic and GAP food and agricultural products in ASEAN.

2. Methodology and Process

2.1. Due to the comparatively higher prices of organic and GAP-certified food products as compared to other food products usually encountered in the market in the selected countries, it was decided that the main target group for the survey would be middle-income consumers residing in urban centers/main cities of these countries. For this purpose, income information was obtained from respective country partners for the purpose of segregating respondents according to their income levels. The following income structures were used:

	Low income group	***Lower to middle income***		***Middle and higher income***	
Cambodia	Less than 200 USD	200-250 USD	250-350 USD	350-700 USD	Above 700 USD
Myanmar	Less than 150,000 MMK	150,001 - 300,000 MMK	300,001 – 500,000 MMK	500,001 – 1,000,000 MMK	Above 1,000,000 MMK
Vietnam	Less than 5,000,000 VND	5,000,001 – 10,000,000 VND	10,000,001 – 20,000,000 VND	20,000,001 – 35,000,000 VND	Above 35,000,000 VND

Note: The information sought is about the average net income per month of the entire household, not about the monthly salary or income of the respondent. This include the salary and non-salary (such as interests from savings, leasing of real estates, income from stock trading, retirement/social benefits, etc) income of ALL earning/working members of the household. No exact figure is being sought, only general estimates, to ease any privacy concerns that respondents might have.

2.2. In consultation with country partners, the following locations were selected for undertaking the surveys:

- In Cambodia: Phnom Penh – Capital city
- In Myanmar: Yangon and Mandalay – Two commercial/urban centers
- In Vietnam: Hanoi (Capital city) and Ho Chi Minh City (Biggest commercial/urban center in the country)

2.3. For each country, a sample of at least 150 consumers would be randomly selected at 04 types of locations: (i) unorganized wet markets, (ii) organized wet markets, (iii) organic stores, and (iv) grocery stores located at higher end shopping malls frequented by consumers across different socio-economic status, in order to ensure a wide range of comparable viewpoints. The number of respondents should be equally divided amongst these four types of locations.

Interview in progress in Myanmar

2.4. Partners were asked to conduct direct interviews in local language at the point of sale so that consumers could be approached directly after they had just conducted a purchase at the market store. To ensure relevance, consumer were asked whether they were mainly or jointly responsible for buying food and grocery items in their households, and whether they had ever heard of either of the terms 'organic food' or good agriculture practices (GAP), as 'screening' questions. Only those who responded positively to both these questions would be invited to participate in the survey. In total, 152 respondents in Cambodia, 157 in Myanmar and 150 in Vietnam participated in the survey.

2.5. A common structured questionnaire were prepared and translated into local languages (Khmer, Burmese and Vietnamese) with certain adaptations such as use of local currencies, corresponding income groups, and appropriate visuals (logos and marks) (See 5.1. for the Questionnaire). For this survey, the methodology is purely quantitative analysis. Therefore, for each question, multiple choices were provided for respondents to select the one(s) most applicable to them, with assigned symbols (A,B,C,D, etc) and numbers (1,2,3,4, etc). All questions in the questionnaire must be answered in order for a response to be counted as qualified.

2.6. The questionnaire contains in total 27 questions, including 02 screening questions, 06 questions on demographic information, and 19 substantive questions. The substantive questions pertain to certain aspects such as:

- Consumer awareness and knowledge of organic and GAP certified food in ASEAN market;
- Attitudes and perceptions towards buying and consuming organic and GAP certified food;
- Consumer sources of information on what organic and GAP products are about;
- Awareness of facts on organic products, farming and good agricultural practices;
- Reasons for buying and consuming organic or GAP certified food and agri-products;
- Trust on verification methods;
- Willingness to purchase organic or GAP certified food and agri-products;

Interview in progress in Vietnam

- Preferred outlets for purchase of organic or GAP food and agri-products; and
- Recognition of identifiable and associated trademarks or labels for organic and GAP food and agri-products *inter alia*.

Training in Vietnam

2.7. Before commencement of fieldwork, detailed training and briefing of field teams was carried out in all three countries, in Phnom Penh, in Yangon (with physical participation of Mandalay team) and in Hanoi (with Skype connection to Ho Chi Minh City team) directly by the regional experts. All questions were explained and interview methods introduced, along with pre-forma Excel sheet for data inputs at the later stage. Trial interviews were also undertaken by field team members with each other during the training, to ensure subsequent smooth operations.

2.8. Fieldwork was carried out over 8-week period in February and March 2018. Data input, processing and analysis was done in April. In addition to segregation according to survey locations and income groups as mentioned above, data input and analysis were also done according to 03 other types of demographic information (gender, age and education level) to the extent possible.

Training in Cambodia

3. Survey Results

3.1. Cambodia

3.1.1. Cambodia is a least developed country (LDC) with a Gross National Income (GNI) per capita level of US$1,075 in 2018.[1] The country's total population was estimated at 15.8 million people in 2016, according to the latest census figures. Average living wage per family stood at 1,265,200 Cambodian *riel* (approximately US$311) per month in 2017.[2]

3.1.2. Agriculture, forestry and fishing together accounted for 28.4% of GDP in Cambodia. According to the database of the International Federation of Organic Agriculture Movements (IFOAM), Cambodia devoted only 0.15% of its agricultural land to organic farming in 2011, which appeared to be a very low estimate. Interest in organic agriculture, however, is growing, mostly with regards to rice. The Cambodian Center for Study and Development in Agriculture (CEDAC) estimated that 5,400 hectares of paddies were organic (only 0.02% of the total paddy land) and around 5,000 of the 1.8 million rice farmers in Cambodia practiced organic farming.[3]

3.1.3. The vegetable sector in Cambodia, on the other hand, is dominated by imports from Vietnam and Thailand which together supply 40 to 50 percent of the vegetables consumed in the country, most of all in Phnom Penh and Siem Reap. Due to the massive importation of Vietnamese vegetables, prices in Phnom Penh are significantly lower than in provincial towns. Given this condition, for many Cambodian vegetable growers, including the organic growers, there is little incentive to deliver to wholesalers in Phnom Penh.

3.1.4. Food safety is a big problem Cambodia, and is causing a lot of concerns amongst consumers.[4] For example, tests conducted on 245 leafy vegetables and long bean samples from several markets in Phnom Penh in 2010 revealed that between 15 percent (long bean) and 95 percent (white stemmed kale) contain detectable level of pesticides called organophosphate and carbamate pesticides which include commonly used insecticides, many of them ranked as hazardous.[5] In 2016 alone, there were about 1,000 reported cases of food poisoning throughout the country. Against this background, it is no wonder that the survey results in Cambodia showed an overall positive perception and preference of consumers towards organic and GAP-certified food products, especially where their level of disposable income allows more spending on food and health.

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[1] For more information, see <https://www.un.org/development/desa/dpad/least-developed-country-category-cambodia.html>

[2] For more information, see <https://tradingeconomics.com/cambodia/population>

[3] <http://www.ticambodia.org/library/wp-content/files_mf/1457324667Organicagriculturepost2015developmentgoals.pdf>

[4] See for example <https://www.khmertimeskh.com/5085845/food-safety-health-concern-cambodia/>, or <https://www.phnompenhpost.com/business/food-safety-needs-tightening>

[5] <https://data.opendevelopmentmekong.net/dataset/defe1d17-aee8-43ed-b861-0b328cd75d25/resource/2a42b5fb-8c49-4f3f-bf93-b87219c0a472/download/reportorganic-agriculture-in-cambodia-coraa-april-2011-final-for-web.pdf>

3.1.5. The demographics of survey respondents in Cambodia were fairly well distributed across different groups, as shown in the following table. By gender, the number of female respondents was higher than that of male respondents, which, however, could be explained by the fact, in Asian societies, the purchase of grocery and foodstuff is mostly conducted by women. A majority of respondents belonged to the middle (32%) and higher (32%) income groups. Most were between 25-34 years old (52%) and 35-44 years old (40%), and were fairly educated (of secondary and high school level: 39%, and of college and university level: 35%).

An organic agriculture site in Cambodia

Demographic Information of Respondents in Cambodia			
		Value	***Percentage***
Total Sample		152	100%
Survey Location	Unorganized wet market	38	25%
	Organized wet market	38	25%
	Organic Store	38	25%
	Grocery store in a high-end supermarket/ shopping mall	38	25%
Gender	Male	28	18%
	Female	124	82%
Household average net income per month	Less than 200	8	5%
	From US$200-250	14	9%
	From US$250-350	33	22%
	From US$350-700	48	32%
	Above US$700	49	32%
Age groups	18-24 years old	15	10%
	25-34 years old	52	34%
	35-44 years old	40	26%
	45-54 years old	27	18%

	55-64 years old	14	9%
	Above 65 years old	4	3%
Education levels	No school	4	3%
	Primary level	28	18%
	Secondary and High school	60	39%
	College & University	53	35%
	Post-graduate	7	5%

3.1.6. A high majority of consumers in Cambodia who participated in our survey (90.13%) indicated that their concern for health in general was one of the most important factors influencing their purchasing decisions and practices with regards to foodstuffs and groceries. Amongst the elements considered during the purchase process, 'health/nutrition' ranked first, with 84% of consumers thinking it is important to buy safe and healthy food. Coming second is 'price/affordability' (45%), then 'brand-name' (38%), 'taste' (36%), 'availability' (32%), and 'certification of origin/quality' (27%). Middle and higher income consumers care more about safety-related factors such as brand-name, certification, and nutritional quality rather than price and availability. Specifically, 43 out of 49 members of the high-income group (87.75%), and 42/48 members of the middle-income group (87.5%) considered "health/nutrition" while purchasing food products in general.

Elements considered during purchase by income levels in Cambodia

	Total (=100%)	***Less than 200 USD***	***200-250 USD***	***250-350 USD***	***350-700 USD***	***Above 700 USD***
Brand-name	57	7%	7%	7%	22.8%	56.2%
Health/Nutrition	128	4.7%	7.8%	21.1%	32.8%	33.6%
Price/Affordability	68	7.4%	10.3%	23.5%	27.9%	30.9%
Taste	54	5.6%	9.2%	22.2%	29.6%	33.4%
Availability	48	10.4%	10.4%	29.2%	27.1%	22.9%
Certification (of origin/quality)	41	2.4%	14.6%	14.6%	21.9%	46.5%

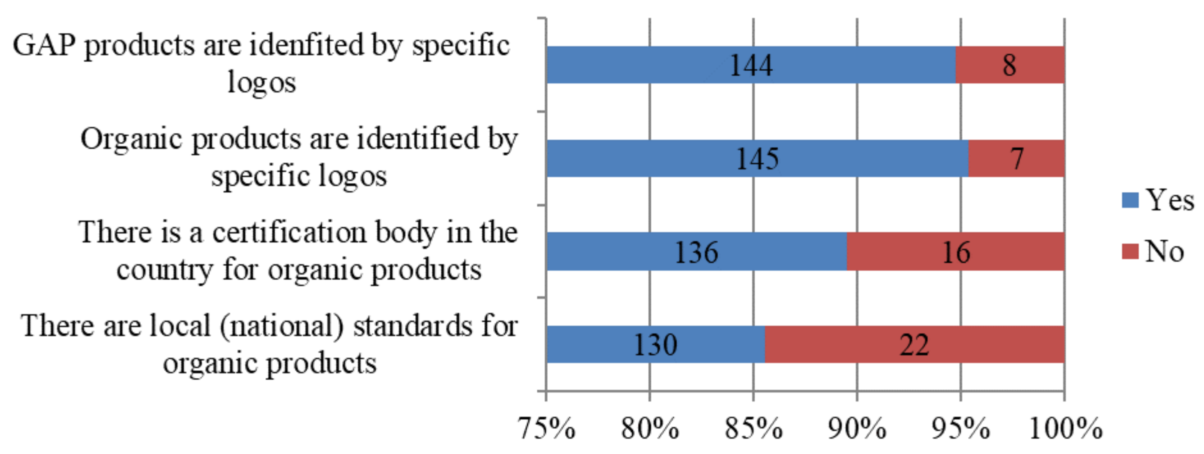
3.1.7. Probably due to the food safety concerns described above, Cambodian consumers predominantly associated organic and GAP-certified food products with such characteristics as 'natural' (96.7% for organic foods), 'safe food products' (97% in the case of GAP products), 'healthy' (81.6% for organic foods, and 84% for GAP products), and 'products free from chemicals' (44.7% for organic foods, and 22% for GAP-certified foods) – which explained their favorable disposition towards these products. The level of awareness was higher amongst those groups of consumers with higher educational levels. For example, 50%

of those consumers indicating that organic products are those not sprayed with pesticides have college and university degrees.

3.1.8. The most popular source used by consumers to get information about organic products was television and radio programmes (45%), then came words of mouth (38%) and the Internet (36%). The sources preferred were quite similar for GAP products: television and radio (49%), the Internet (37%) and words of mouth (35%). Consumers of the younger age groups showed a clear preference for the more sophisticated information channels. For example, 52.63% of those consumers who used newspapers and magazines to get more information about organic products are between 25-34 years old, 43.64% who used the Internet are also of these ages. By income levels, similar patterns could be seen amongst those consumers with middle and higher income levels. For example, amongst those favoring television and radio programmes as a popular source of information for GAP products, 37.33% earned between US$350-700 per month (as a family), and 26.67% earned more than US$700 per month. 31.25% respectively were from these two groups who preferred to check newspapers and magazines, whereas 28.57% and 39.29% were from these two groups who used the Internet to get information about GAP products.

3.1.9. The level of awareness amongst Cambodian consumers who participated in the survey regarding the existence of standards and certification schemes for food products in the country was also quite high, as per the figure below. Around 95% of consumers knew that organic and GAP products are identified by specific logos. Close to 90% of consumers knew that there is a certification body in the country for organic products; and more than 85% were aware that there are local (national) standards for organic products.

Awareness about standards, certifications, etc in Cambodia



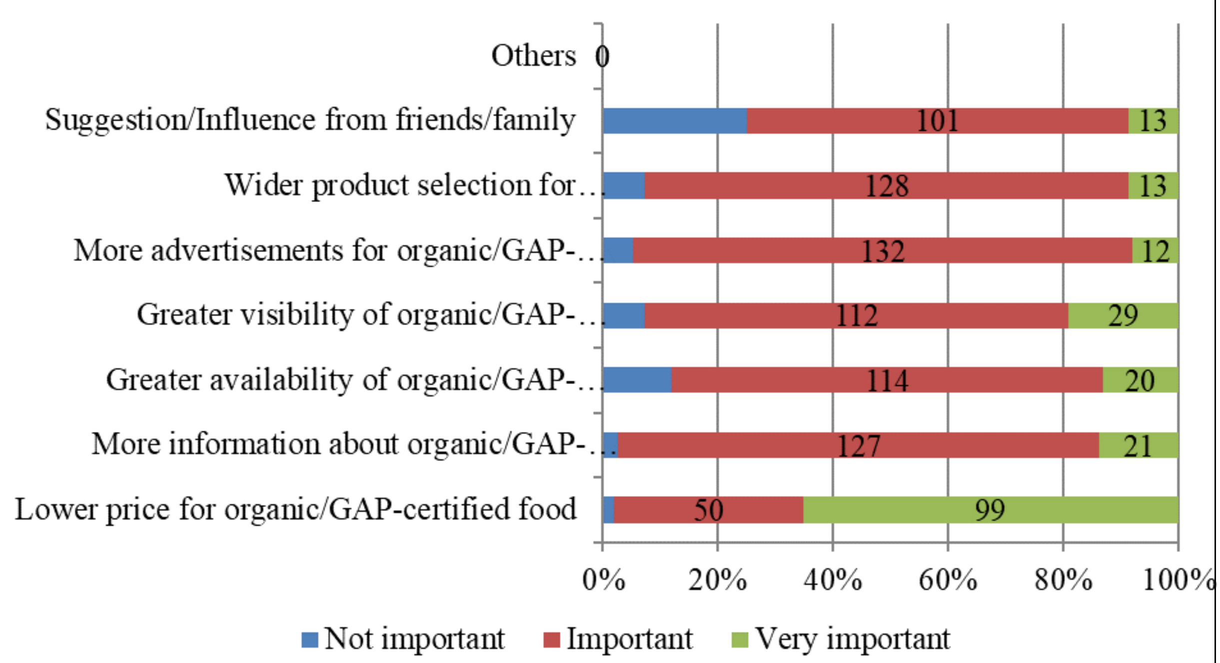
3.1.10. Their concerns for safety and health, in combination with relatively high level of awareness, probably explained Cambodian consumers' clear preference for organic and GAP-certified product. 46.71% of survey respondents chose organic products, while 18.42% chose GAP products. Organic and GAP products were also clearly preferred amongst the consumers of higher income levels, as shown in the following table.

Consumer preferences by income levels in Cambodia

	Total	Less than 200 USD	200 – 250 USD	250 – 350 USD	350-700 USD	Above 700 USD
Choose organic products	71	4.23%	9.86%	16.9%	32.39%	36.62%
Choose GAP products	28	7.14%	3.57%	21.43%	35.71	32.15%
Choose locally produced products	41	2.44%	2.44%	21.95%	29.27%	43.9%
Makes no difference	29	6.89%	17.25%	31.04%	37.93%	6.89%

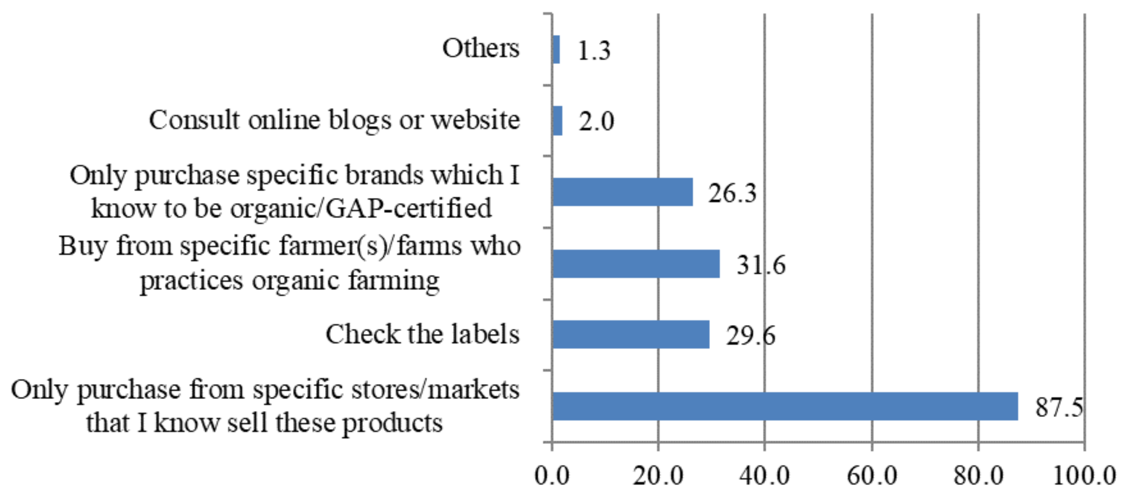
3.1.11. Amongst the motivations for buying (more) organic/GAP products, many consumers in Cambodia (65.13%) thought it is 'very important' to have 'lower price', whereas 32.89% thought 'lower price' is 'important', as can be seen in the following figure. This is understandable in the context of a low-income country, where the land area for organic/GAP farming is still limited, and the dominance of low-price imports is driving down the marketability of such products for not being able to compete on price, despite consumers' preference for them. Most consumers rated other factors such as 'more advertisement', 'more information', 'wider selection', 'greater availability', 'greater visibility' of organic/GAP products as being 'important'.

Motivations for buying organic/GAP products in Cambodia



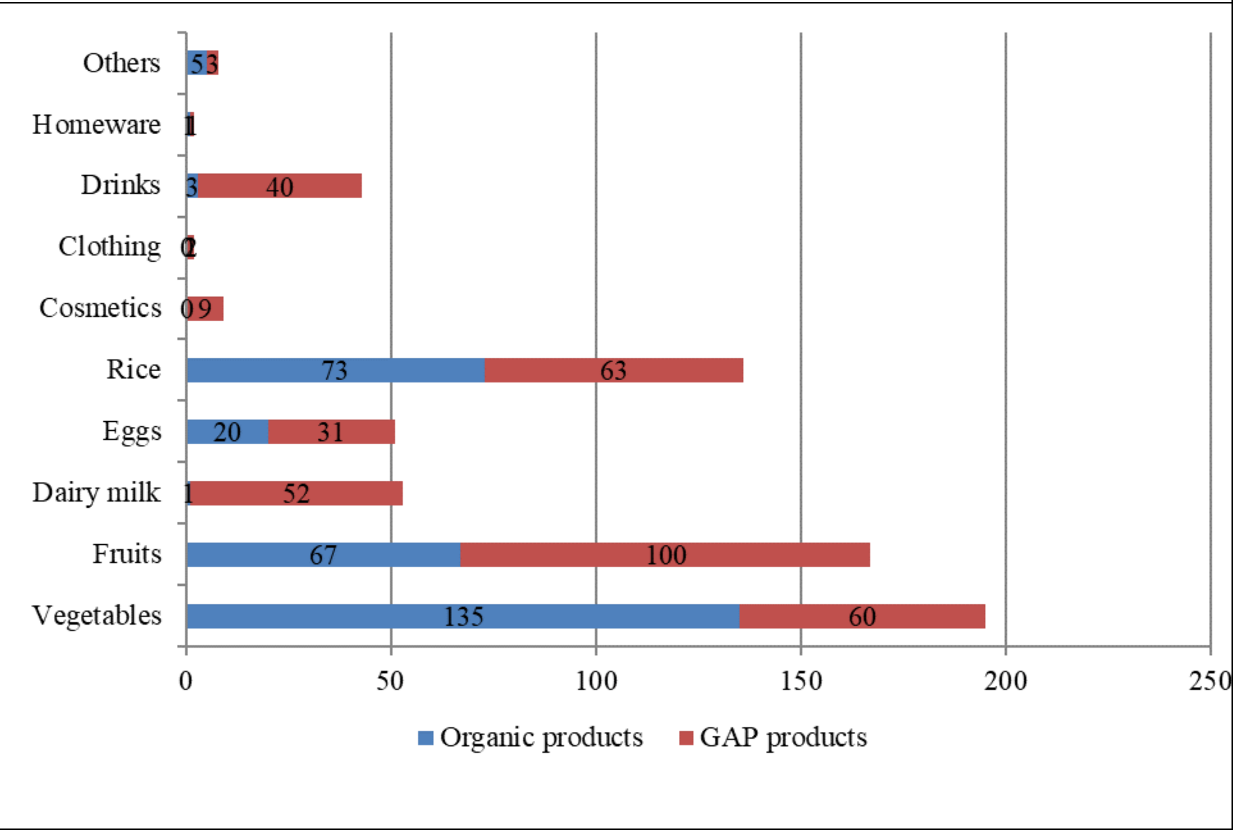
3.1.12. There is a positive correlation between the levels of education and the level of trust into verification methods such as government stamps, logos, certification marks, etc. However, consumers still tended to rely more on some specific sellers (stores/markets) to verify the products for them (87.5%), instead of checking the labels or brands (doing their own research and gathering info by themselves) themselves (only 29.6%), as could be seen in the following figure. The government was most trusted by most consumers (45.4%) to provide verification services. A small number of consumers would rely on independent certification bodies (13.8%), NGOs working with farmers (11.8%) and surprisingly the farmers themselves (29.6%)

How consumers verify organic/GAP products in Cambodia



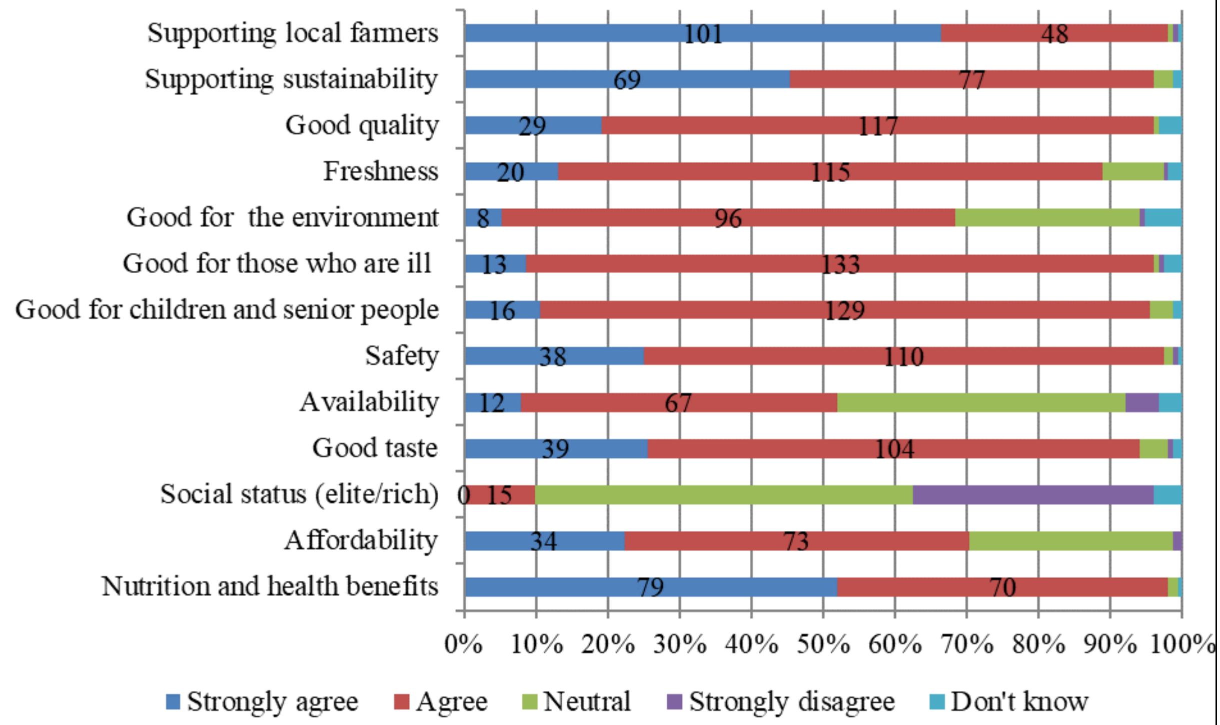
3.1.13. The level of actual consumption of organic/GAP products in Cambodia is also quite encouraging. 84.9% respondents indicated that they had consumed both organic and GAP products in the past. 11.8% said they had consumed only organic products, and 3.3% said they had consumed only GAP products. Most consumers would purchase organic and GAP products around 1-2 times a week (48.68% and 59.86% respectively), whereas a small number would even went for purchase 2-3 times a week (28.29% for organic products, and 21% for GAP products). The most popular organic/GAP products consumed include vegetables, fruits, and rice, as can be seen in the following figure. Most consumers preferred to go open air/street markets for their purchase, and then organic food stores.

Types of organic/GAP products purchased in Cambodia



3.1.14. A majority of consumers quoted valid reasons such as ‘supporting local farmers’, ‘nutrition and health benefits’, and ‘supporting sustainability’ as ‘strong’ reasons for their consumption. Other reasons many ‘agreed’ with include ‘because organic/GAP products are good for those who are ill’, ‘because organic/GAP products are good for children and senior people’, ‘freshness’, ‘good quality’, ‘safety’, and ‘good taste’, as could be seen in the following figure. Most indicated that they would ‘very likely’ continue consumption of organic products (86.84%) and GAP products (76.97%) in the future.

Reasons for choosing organic and GAP products in Cambodia



3.1.15. The Cambodian consumers' ability to recognize relevant logos and marks certifying organic and GAP products, however, remained limited. More than half of the total number of respondents (52.63%) could not recognize the logos and marks being shown to them, showing the dire need for raising consumer awareness in the country.

An organic vegetable brand in Cambodia

3.2. Myanmar

3.2.1. Myanmar is also a least developed country (LDC) with a Gross National Income (GNI) per capita level of US$1,255 in 2018.[6] The country's total population was estimated at 52.9 million people in 2016, according to the latest census figures. Minimum wage stood at 4,800 Burmese *kyat* (approximately US$3.56) per day in 2018.[7]

3.2.2. In 2017, the agriculture sector contributed 22.1% of GDP, 20% of export value, 61.2% of employment for the overall labor force and constituted the main source of livelihood for 70% of rural population in Myanmar.[8] Crop production accounted for around 72% of agricultural output. Myanmar's three main groups include paddy rice, beans and pulses, and oilseed crops.[9] Even though no data is available regarding organic farming and application of GAP in the country, anecdotal evidence shows that Myanmar considers organic farming and wider application of GAP as strategic areas for increasing the competitiveness of Myanmar agricultural products, with a view to ensuring food security and safety, and increasing export revenues.[10]

Unorganized wet market in Myanmar

3.2.3. Food safety is also a major concern for Myanmar. According to the Myanmar Consumer Report 2017, 'foods and drugs' is the area where Myanmar consumers had the highest number of problem. Most of the food problems are concerned with lack of freshness or unhealthy and unhygienic foods, followed by food containing residues of chemicals/pesticides/ weed killers, and dyes. Other problems are related to expiry dates (lack of label and expiry date on label, and selling expired foods); cheap and low-quality Chinese foods/snacks and drugs; drinking water; low-quality or adulteration with low quality or reused cooking oil; and underweight products.[11] As a result, our survey respondents in Myanmar also showed a positive perception towards organic and GAP products in general.

3.2.4. The demographics of survey respondents in Myanmar were also fairly well distributed across different income groups, as shown in the following table, except for the poorest

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[6] For more information, see <https://www.un.org/development/desa/dpad/least-developed-country-category-myanmar.html>
[7] For more information, see <https://tradingeconomics.com/myanmar/population>
[8] <http://www.thaibizmyanmar.com/docs/Presentation%202-%20Agricultural%20Sector%20Development%20in%20Myanmar.pdf>
[9] <https://www.ccifrance-myanmar.org/sites/ccifrance-myanmar.org/files/resources-documents/agriculture_guide_2018.pdf>
[10] See for example <http://ali-sea.org/wp-content/uploads/IPM-Myanmar_VFF.pdf>, and <http://www.myanmar-responsiblebusiness.org/pdf/2017-01-Roundtable-Towards-a-Myanmar-Food-Safety-Responsible-Sourcing-Initiative.pdf>
[11] See <https://www.myanmarconsumersunion.org/en/myanmar-consumer-report/> for more details

segment (constituting only 1%). Similar to the situation in Cambodia, the number of female respondents was higher than that of male respondents, which could be explained by the fact, in Asian societies, the purchase of grocery and foodstuff is mostly conducted by women. Most respondents were between 25-34 years old (37%), 35-44 years old (50%), and 45-54 years old (35%). The prevailing levels of education were 'college and university' (43%), and 'secondary and high school' (33%).

Demographic Information of Respondents in Myanmar			
		Value	***Percentage***
Total Sample		157	100%
Survey Location	Unorganized wet market	40	25%
	Organized wet market	40	25%
	Organic Store	38	25%
	Grocery store in a high-end supermarket/ shopping mall	39	25%
Gender	Male	45	29%
	Female	112	71%
Household average net income per month	Less than 150,000 MMK	1	1%
	From 150,001 – 300,000 MMK	44	28%
	From 300,001 – 500,000 MMK	38	24%
	From 500,001 – 1 mil MMK	42	27%
	Above 1 mil MMK	32	20%
Age groups	18-24 years old	9	6%
	25-34 years old	37	24%
	35-44 years old	50	32%
	45-54 years old	35	22%
	55-64 years old	21	13%
	Above 65 years old	5	3%
Education levels	No school	2	1%
	Primary level	6	4%
	Secondary and High school	52	33%
	College & University	68	43%
	Post-graduate	29	18%

3.2.5. More than 50% of consumers in Myanmar who participated in our survey indicated that their concern for health in general was as one of the most important factors influencing their purchasing decisions and practices with regards to foodstuffs and groceries. Amongst the elements considered during the purchase process, 'health/nutrition' ranked first, with 89% of consumers thinking it is important to buy safe and healthy food. Coming second is 'certification of origin/quality' (57%), then 'brand-name' (49%), 'taste' (45%), 'price/affordability' (41%), and 'availability' (29%). Middle and higher income consumers care more about safety-related factors such as brand-name, certification, and nutritional quality rather than price or availability of products. Specifically, 28 out of 32 members of the high-income group (87.5%), and 35/42 members of the middle-income group (83.3%) considered "health/nutrition" while purchasing food products in general.

Elements considered during purchase by income levels in Myanmar

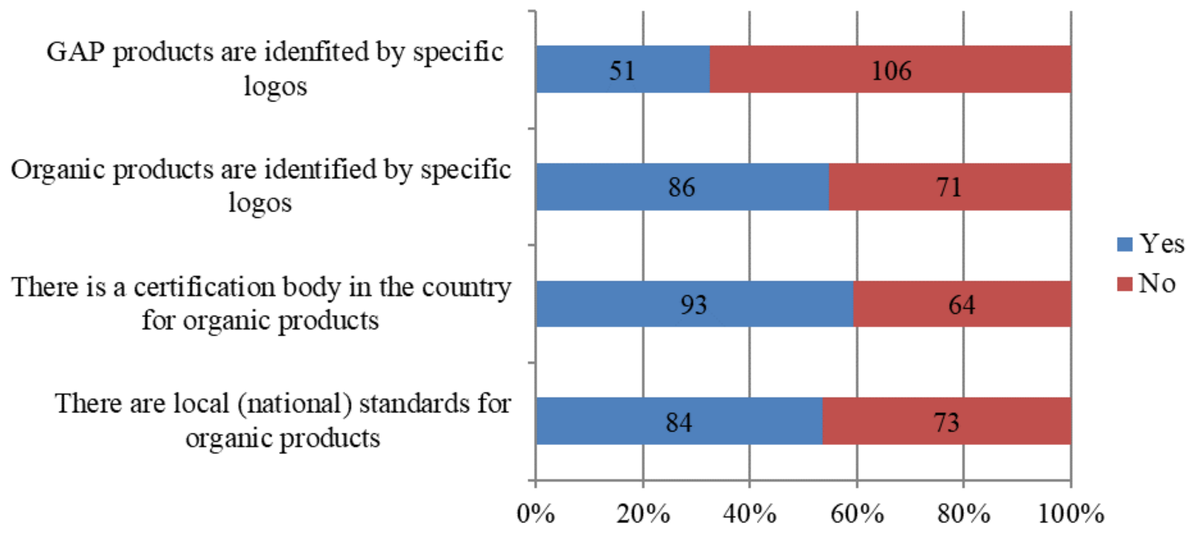
	Total (=100%)	***Less than 150,000 MMK***	***150,001 - 300,000 MMK***	***300,001 – 500,000 MMK***	***500,001 – 1 mil MMK***	***Above 1 mil MMK***
Brand-name	**77**	0%	19.48%	31.17%	31.17%	18.18%
Health/ Nutrition	**139**	0.72%	26.62%	27.34%	25.18%	20.14%
Price/ Affordability	**65**	0%	26.15%	29.23%	27.69%	16.93%
Taste	**70**	0%	27.14%	22.86%	30%	20%
Availability	**45**	2.22%	26.67%	26.67%	26.67%	17.77%
Certification (of origin/quality)	**90**	0%	25.56%	24.44%	30%	20%

3.2.6. Burmese consumers also predominantly associated organic and GAP-certified food products with such characteristics as 'natural' (76% for organic foods), 'safe food products' (62.4% in the case of GAP products), 'healthy' (61% for organic foods, and 54.1% for GAP products), and 'products not sprayed with pesticides' (39% for organic foods, and 33.8% for GAP-certified foods) – which explained their favorable disposition towards these products, due to the widespread problems with food products in Myanmar mentioned above. The level of awareness was higher amongst those groups of consumers with higher educational levels. For example, 50% of those consumers indicating that organic products are those not sprayed with pesticides have college and university degrees. 55.88% of those consumers indicating that organic products are those free from GMOs are of the same educational level.

3.2.7. Also similar to the results in Cambodia, the three sources most frequently used by Burmese consumers to get information about organic and GAP products are 'television and radio programmes', 'newspapers and magazines', and 'the Internet'. For organic products, 62% of consumers used television and radio, and 54% of them used newspapers and magazines, and the Internet respectively to get information. For GAP products, 63% used television and radio, 49% used the Internet and 48% used newspapers and magazines. But surprisingly, amongst the most populated age group of respondents (between 35-44 years old), the most frequently used sources of information are 'promotional events/trade fairs' (50%), 'advertisements' (41.86%), and 'words of mouth' (46.88%). By income levels, there was no clear pattern as respondents tended to use different sources of information fairly indiscriminately.

3.2.8. The level of awareness amongst Burmese consumers who participated in the survey regarding the existence of standards and certification schemes for food products in the country ranged between low to moderate, as per the figure below. 67.5% of survey respondents were not aware that GAP products are identified by specific logos, despite the existence of Myanmar GAP for quite some time till date, for instance.

Awareness about standards and certifications, etc in Myanmar



3.2.9. Despite their limited awareness, Burmese consumers' high level of concerns regarding the food safety situation in the country clearly drove their preference for organic and GAP-certified product. 72.6% of survey respondents chose organic products, which are also more popular amongst the more well-off groups of consumers; whereas those consumers with low income tended to go for locally produced products, as could be seen from the table below.

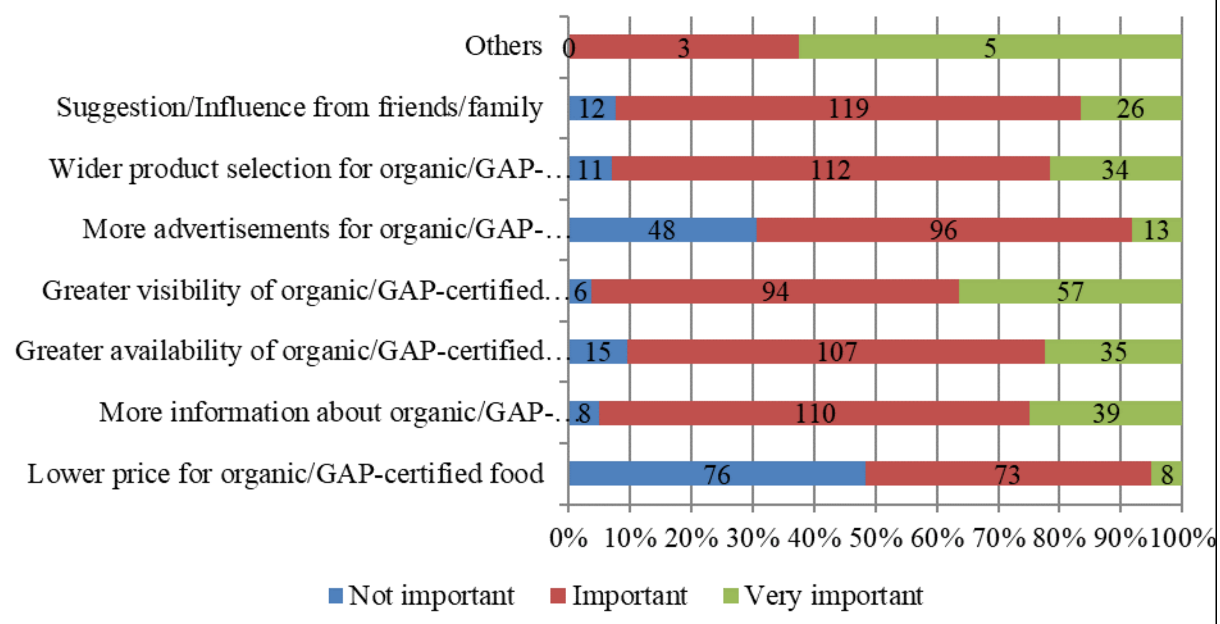
Consumer preferences by income level in Myanmar

	Total	*Less than 150,000 MMK*	*150,001 - 300,000 MMK*	*300,001 – 500,000 MMK*	*500,001 – 1 mil MMK*	*Above 1 mil MMK*
Choose organic products	**114**	0%	25.44%	21.93%	30.7%	21.93%
Choose GAP products	**19**	0%	26.32%	36.84%	26.32%	10.52%
Choose locally produced	**17**	5.88%	52.94%	17.64%	5.88%	17.66%

products						
Makes no difference	**7**	0%	14.29%	42.86%	14.29%	28.56%

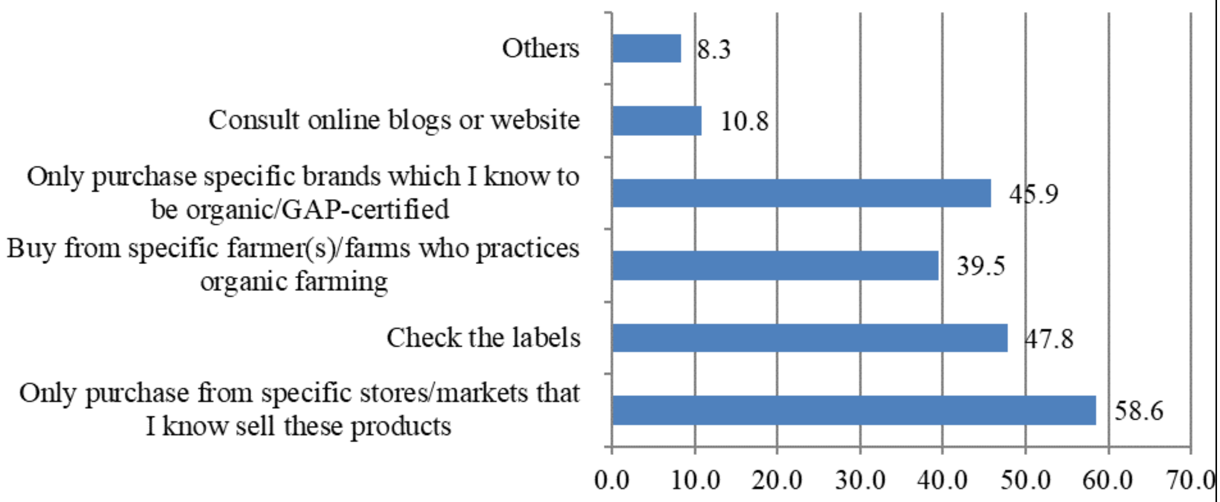
3.2.10. As regards the motivations for buying (more) organic/GAP products, many consumers in Myanmar thought it is 'important' to have 'suggestions from friends/family' (75.79%), 'wider product selection for organic/GAP products' (71.33%), 'more product information' (70%), 'greater availability' (68.15%), 'more advertisement' (61.14%), and 'greater visibility for organic/GAP products at shops/supermarkets' (59.87%). 48.4% of all respondents thought it is not important to have 'lower price for organic/GAP products' as an incentive for purchase, while 46.5% though it is important to have 'lower price' and 5.1% thought it is very important, as can be seen from the following figure.

Motivations for buying organic/GAP products in Myanmar



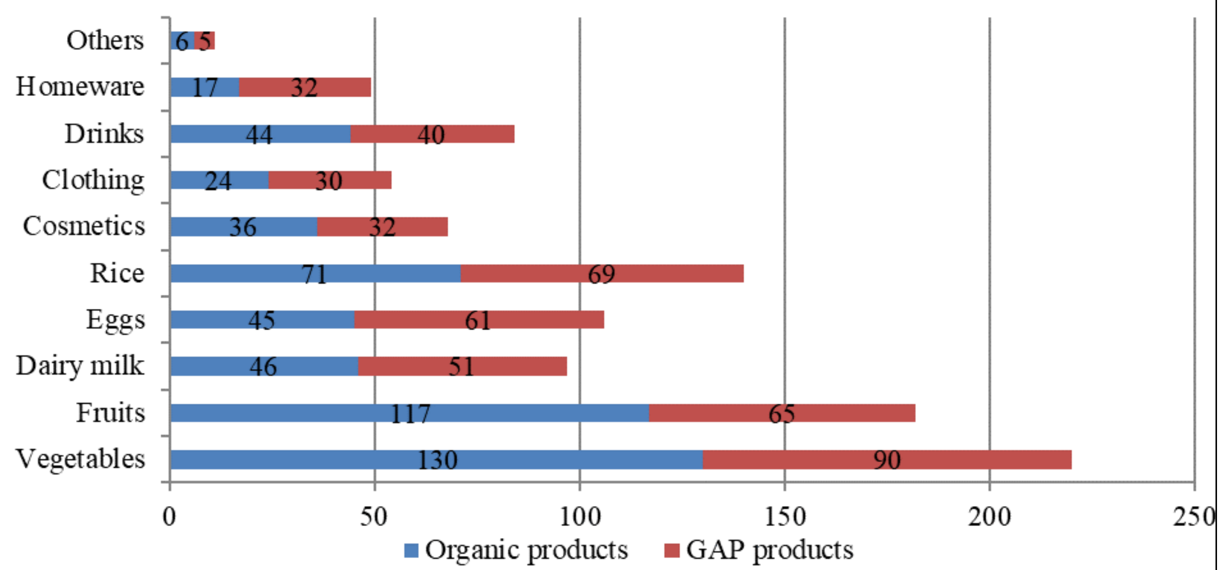
3.2.11. There is positive correlation between the levels of education and the level of trust into verification methods such as government stamps, logos, certification marks, etc as well as sustainable investment made by the brand. However, consumers still tended to rely more on those outlets (58.6%) and brands (45.9%) that they trusted already than checking the labels or brands (doing their own research and gathering info by themselves) themselves (47.8%), as could be seen in the following figure. The government was most trusted by most consumers (80.9%) to provide verification services. Many consumers would rely on independent certification bodies (51.6%) and surprisingly the farmers themselves (55.4%).

How consumers verify organic/GAP products in Myanmar



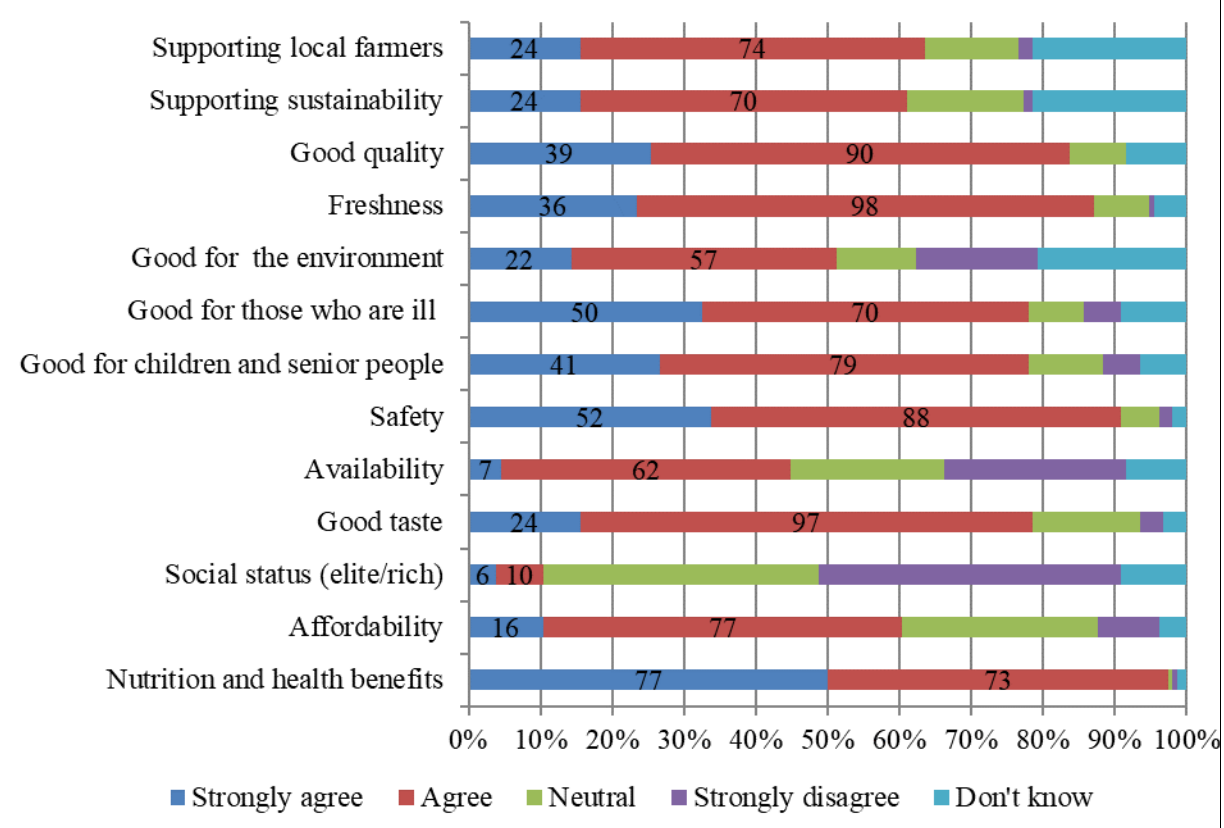
3.2.12. Due to the limited production and thus availability of organic/GAP products in Myanmar, the level of actual consumption of organic/GAP products here remains modest, as compared to Cambodia. Only 60.5% respondents indicated that they had consumed both organic and GAP products in the past. 29.3% said they had consumed only organic products, and 8.3% said they had consumed only GAP products, while 1.9% said they had consumed neither organic nor GAP products. Most consumers would purchase organic and GAP products around 1-2 times a week (57.96% and 61.14% respectively). The most popular organic/GAP products consumed include vegetables, fruits, and rice, as can be seen in the following figure. Most consumers preferred to go supermarket chains/stores for their purchase, and then open air/street markets.

Types of organic/GAP products purchased in Myanmar



3.2.13. A majority of consumers quoted ‘freshness’, ‘good quality’, ‘good taste’ and ‘safety’ as reasons for choosing organic/GAP products. Other reasons many ‘agreed’ with include ‘nutrition and health benefits’, ‘because organic/GAP products are good for children and senior people’, ‘because organic/GAP products are good for those who are ill’, and ‘affordability’, as could be seen in the following figure. Most indicated that they would ‘very likely’ continue consumption of organic products (70.7%) and GAP products (62.42%) in the future.

Reasons for choosing organic and GAP products in Myanmar



3.2.14. The Burmese consumers’ ability to recognize relevant logos and marks certifying organic and GAP products remained limited. More than half of the total number of respondents (59.24%) could not recognize the logos and marks being shown to them, showing the dire need for raising consumer awareness in the country.

3.3. Vietnam

3.3.1. Vietnam became a lower middle income country in 2010 with a Gross National Income (GNI) per capita level of US$2,185 in 2018.[12] The country's total population was estimated at 94.56 million people in 2016, according to the latest census figures. Average living wage per family stood at 7,475,300 Vietnamese *dong* (approximately US$328) per month in 2017.[13]

3.3.2. Agriculture accounts for almost 20% of GDP and Vietnam has a growing middle class with an increasingly westernized eating pattern. Agriculture's contribution to the national GDP is expected to decline by 0.5% annually, due to decreasing employment in the primary agricultural sector. At the same time, the agro-industry's share is expected to grow to US$51 billion by 2020 and remains a significant market for outside players. Food and non-alcoholic beverages in 2015 represented US$43 billion, or 35% of consumer expenditure.[14]

3.3.3. According to the 2010 report of the International Federation of Organic Agriculture Movements (IFOAM), the certified organic area in Vietnam was some 21.000 hectares, accounting for only 0.07 percent of the total agricultural area of the country, equivalent to 0.2% of the total cropped area of which 7000 hectares was for aquaculture (mainly shrimp). The total export value of organic products of the same year was some US$12-14 million. Main organic products in Vietnam include spices such as cinnamon, star anise and pepper, fruit, cashews, tea and some vegetables.[15] The local Vietnamese market for organic products is not yet very developed, though growing especially in big cities, due to rising income, increased consumer awareness and growing food safety concerns.

An organic food store in Vietnam

3.3.4. Vegetables and fruits are main kinds of crops that receive great concerns with regards to food safety in Vietnam. The total area of vegetables production in Vietnam from 2010 to now has reached about 800 thousand hectares per year, with an average productivity of 16-17 tons/ha, the total output of 13,000 tons, in which around 10-15% is for export, and about 85 - 90% is for domestic consumption. In Vietnam, vegetable production is quite fragmented and often conducted on a small scale (from 500 - 6000m^2/ household). Farmers kept to their own traditional production habits, and VietGAP standards are not yet widely applied.[16] In this context, similar to Cambodia and

[12] <https://www.rvo.nl/sites/default/files/2018/01/maritime-in-vietnam.pdf>
[13] For more information, see <https://tradingeconomics.com/vietnam/wages>
[14] <https://www.rvo.nl/sites/default/files/2017/11/factsheet-agriculture-in-vietnam.pdf>
[15] <http://www.naro.affrc.go.jp/archive/niaes/marco/marco2015/text/ws2-6_h_t_t_giang.pdf>
[16] <https://www.jica.go.jp/vietnam/office/others/pamphlet/ku57pq0000221kma-att/Basic_GAP_Manual_e.pdf>

Myanmar, consumers participating in our survey generally showed quite positive perceptions of organic and GAP products.

3.3.5. The demographics of survey respondents in Vietnam were also fairly well distributed across different income groups, as shown in the following table. Similar to the situation in Cambodia and Myanmar, the number of female respondents was higher than that of male respondents, which could be explained by the fact, in Asian societies, the purchase of grocery and foodstuff is mostly conducted by women. Most respondents were between 25-34 years old (21%), and 35-44 years old (35%). The prevailing levels of education were 'college and university' (61%), and 'secondary and high school' (28%).

Demographic Information of Respondents in Vietnam			
		Value	***Percentage***
Total Sample		150	100%
Survey Location	Unorganized wet market	37	25%
	Organized wet market	37	25%
	Organic Store	38	25%
	Grocery store in a high-end supermarket/ shopping mall	38	25%
Gender	Male	21	14%
	Female	129	86%
Household average net income per month	Less than 5 mil VND	16	11%
	From 5 – 10 mil VND	43	29%
	From 10 – 20 mil VND	57	38%
	From 20 – 35 mil VND	24	16%
	Above 35 mil VND	10	7%
Age groups	18-24 years old	12	8%
	25-34 years old	31	21%
	35-44 years old	52	35%
	45-54 years old	20	13%
	55-64 years old	26	17%
	Above 65 years old	9	6%
Education levels	No school	0	0%
	Primary level	1	1%
	Secondary and High school	42	28%
	College & University	92	61%
	Post-graduate	15	10%

3.3.6. Different from the results in Cambodia and Myanmar, Vietnamese consumers appeared to make their food purchase decisions more randomly, with not much influence by particular any health-related, religious or ethical reasons. Amongst the elements considered during the purchase process, 'certification of origin/quality' ranked first, with 88% of consumers thinking it is important to buy products which have clear origins or whose quality is clearly certified. Coming second is 'health/nutrition' (84%), then 'brand-name' (72%), and 'price/affordability' (70.7%). Middle and higher income consumers care more about safety-related factors such as health/nutritional benefits, certification, and brand-name rather than taste or price and availability of products. Specifically, 9 out of 10 members of the high-income group (90%), and 22/24 members of the middle-income group (91.66%) considered "certification of origin/quality"; 8 out of 10 members of the high-income group (80%), and 21/24 members of the middle-income group (87.5%) considered "health/nutrition" while purchasing food products in general.

Elements considered during purchase by income levels in Vietnam

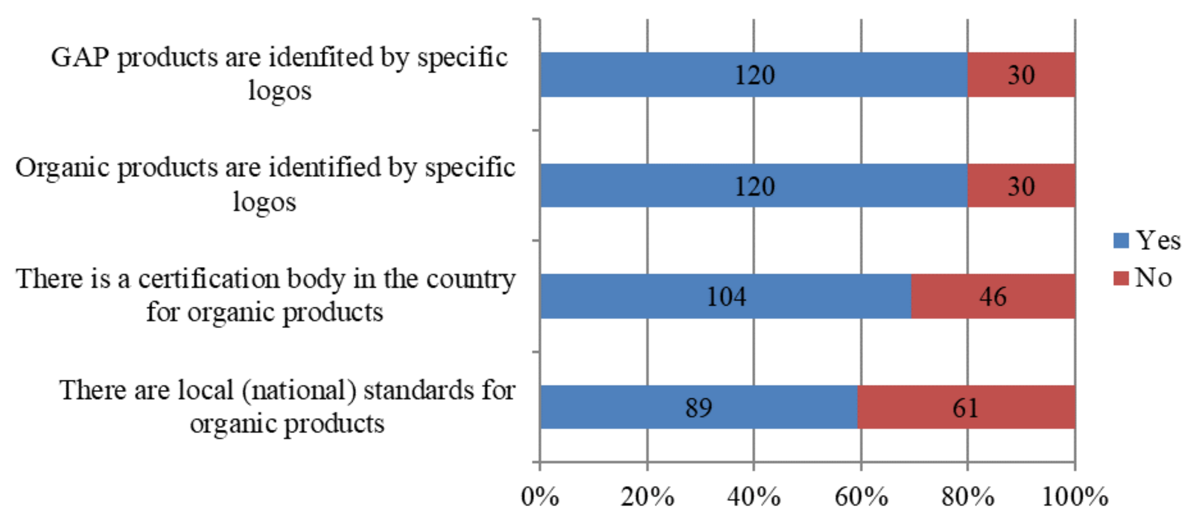
	Total (=100%)	***Less than 5 million***	***5 – 10 million***	***10 – 20 Million***	***20 – 35 Million***	***Above 35 Million***
Brand-name	108	11.11%	26.85%	40.74%	15.74%	5.56%
Health/ Nutrition	126	11.11%	28.57%	37.3%	16.67%	6.35%
Price/ Affordability	106	12.26%	29.25%	37.74%	13.21%	7.54%
Taste	71	9.86%	29.58%	42.25%	12.68%	5.63%
Availability	49	4.08%	32.65%	42.86%	14.29%	6.12%
Certification (of origin/quality)	132	9.85%	29.55%	37.12%	16.67%	6.81%

3.3.7. The level of consumer awareness in Vietnam regarding organic and GAP-certified products seems slightly higher as compared to Cambodia or Myanmar. Specifically, Vietnamese consumers predominantly associated organic and GAP-certified food products with such characteristics as 'products not sprayed with pesticides' (88% for organic foods, 76% for GAP foods), 'products free from chemicals' (86% for organic products and 77.3% for GAP products), 'healthy' (85.3% for organic foods, and 77.3% for GAP products), 'safe' (83.3% for organic foods, and 94% for GAP-certified foods), 'products free from antibiotics' (82% for organic products and 70.7% for GAP products), and 'products free from GMOs' (70% for organic products, and 62% for GAP products). The level of awareness was higher amongst those groups of consumers with higher educational levels. For example, 58.34% of those consumers indicating that organic products are those not sprayed with pesticides have college and university degrees. And 61.24% of those consumers indicating that organic products are those free from chemicals are of the same educational level.

3.3.8. Also similar to the results in Cambodia and Myanmar, the three sources most frequently used by Vietnamese consumers to get information about organic and GAP products are ‘television and radio programmes’, ‘newspapers and magazines’, and ‘the Internet’. For organic products, 81% of consumers used television and radio, and 73% used the Internet and 57% used newspapers and magazines to get information. For GAP products, 78.7% used television and radio, 71.3% used the Internet and 54.7% used newspapers and magazines. The same patterns applied when we considered the different age and income groups.

3.3.9. The level of awareness amongst Vietnamese consumers who participated in the survey regarding the existence of standards and certification schemes for food products in the country is also fairly high, as per the figure below. 80% of survey respondents were aware that organic and GAP products are identified by specific logos respectively.

Awareness about standards and certifications, etc in Vietnam



3.3.10. Surprisingly, the results indicated that consumers in Vietnam had no marked preference for organic and/or GAP products by income levels, as compared to Cambodia and Myanmar. Therefore, there might be a need to develop more targeted information campaigns on the benefits of organic/GAP products for consumers here.

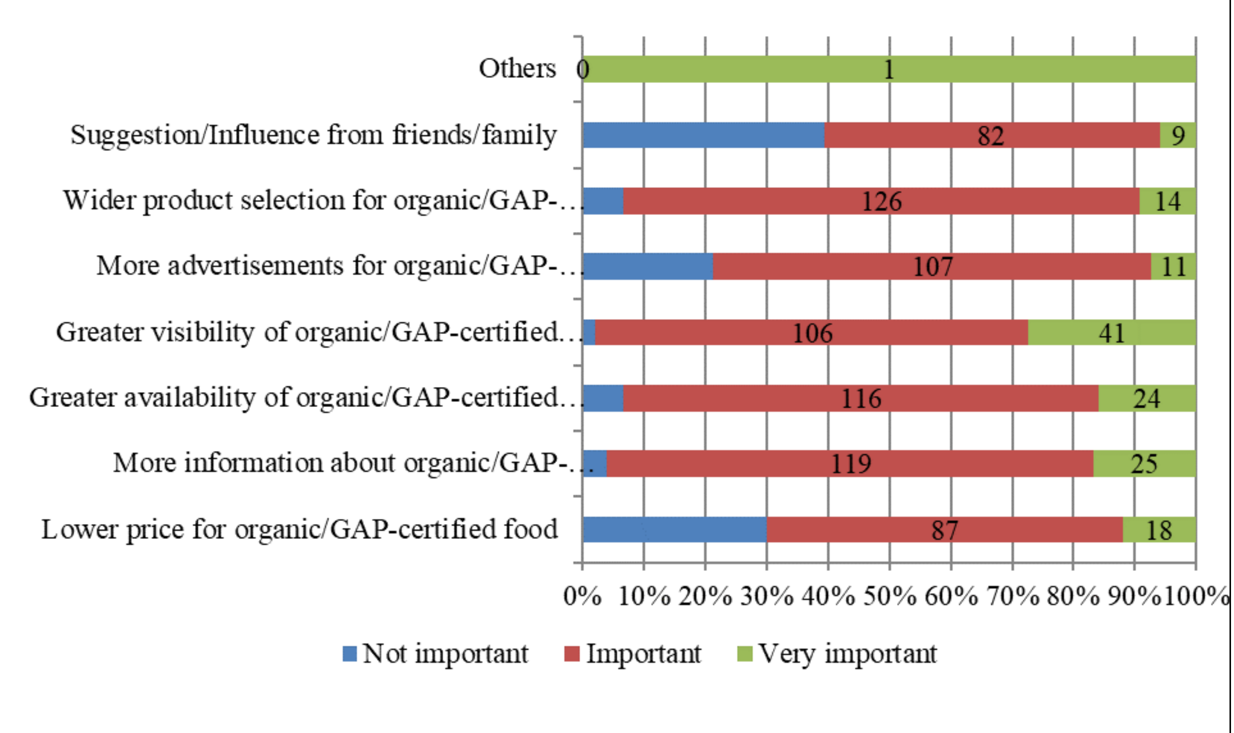
Consumer preferences by income level in Vietnam

	Total	*Less than 5 Mil VND*	*5 – 10 Mil VND*	*10-20 Mil VND*	*20 -35 Mil VND*	*Above 35 Mil VND*
Choose organic products	60	8.33%	28.33%	40%	11.67%	11.67%
Choose GAP products	48	16.67%	31.25%	37.5%	10.42%	4.16%

Choose locally produced products	12	8.34%	33.33%	33.33%	25%	0
Makes no difference	30	6.67%	23.33%	36.67%	30%	3.33%

3.3.11. As regards the motivations for buying (more) organic/GAP products, many consumers in Vietnam thought it is 'important' to have 'wider product selection of organic and GAP products' (84%), 'more information about organic/GAP products' (79.33%), 'greater availability' (71.33%), 'more advertisements' (71.33%), and 'greater visibility for organic/GAP products at shops/supermarkets' (70,66%). 58% of all respondents thought it is important to have 'lower price for organic/GAP products' as an incentive for purchase, while 12% thought it is very important, as can be seen from the following figure.

Motivations for buying organic/GAP products in Vietnam

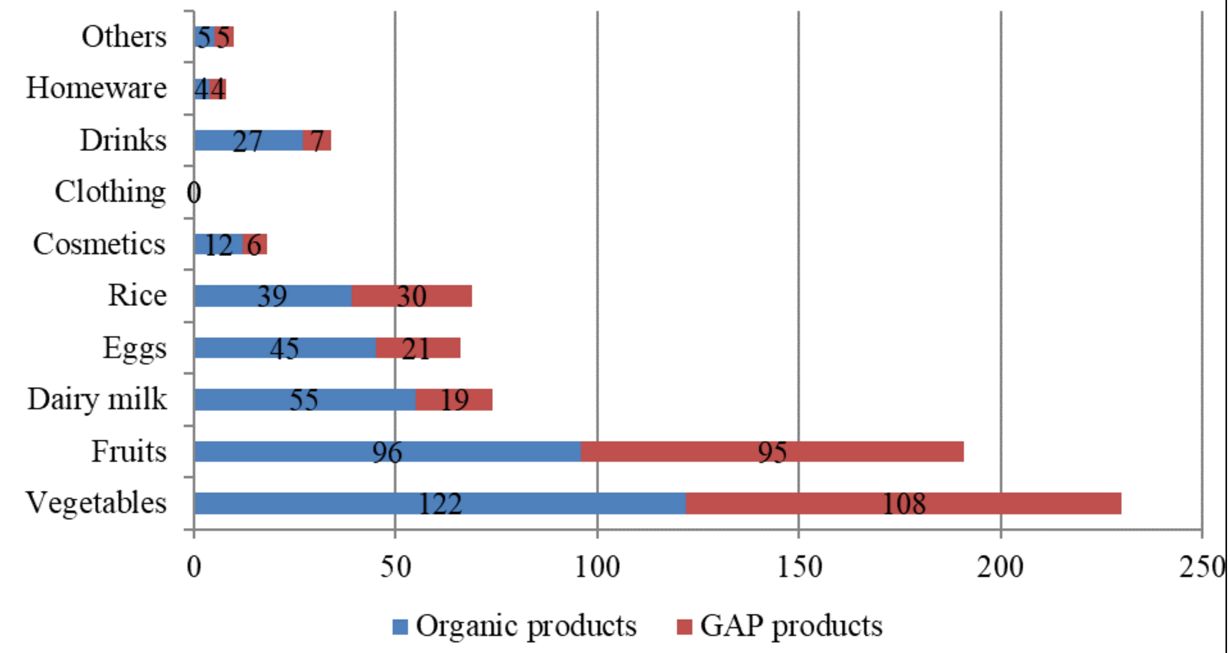


3.3.12. There is also a positive correlation between the levels of education and the level of trust into verification methods such as government stamps, logos, certification marks, etc as well as sustainable investment made by the brand, according to the survey results in Vietnam. Consumers also tended to rely more on those outlets (80.7%) and brands (71.3%) that they trusted already, as in the case of Cambodia and Myanmar. However, Vietnamese consumers were more careful as they also checked the labels or brands (doing their own research and gathering info by themselves) themselves (70%), as could be seen in the following figure. Independent certification bodies are most trusted by most consumers (67.3%) to provide verification services, followed by the government (51.3%), and NGOs working with farmers (44%).

How consumers verify organic/GAP products in Vietnam

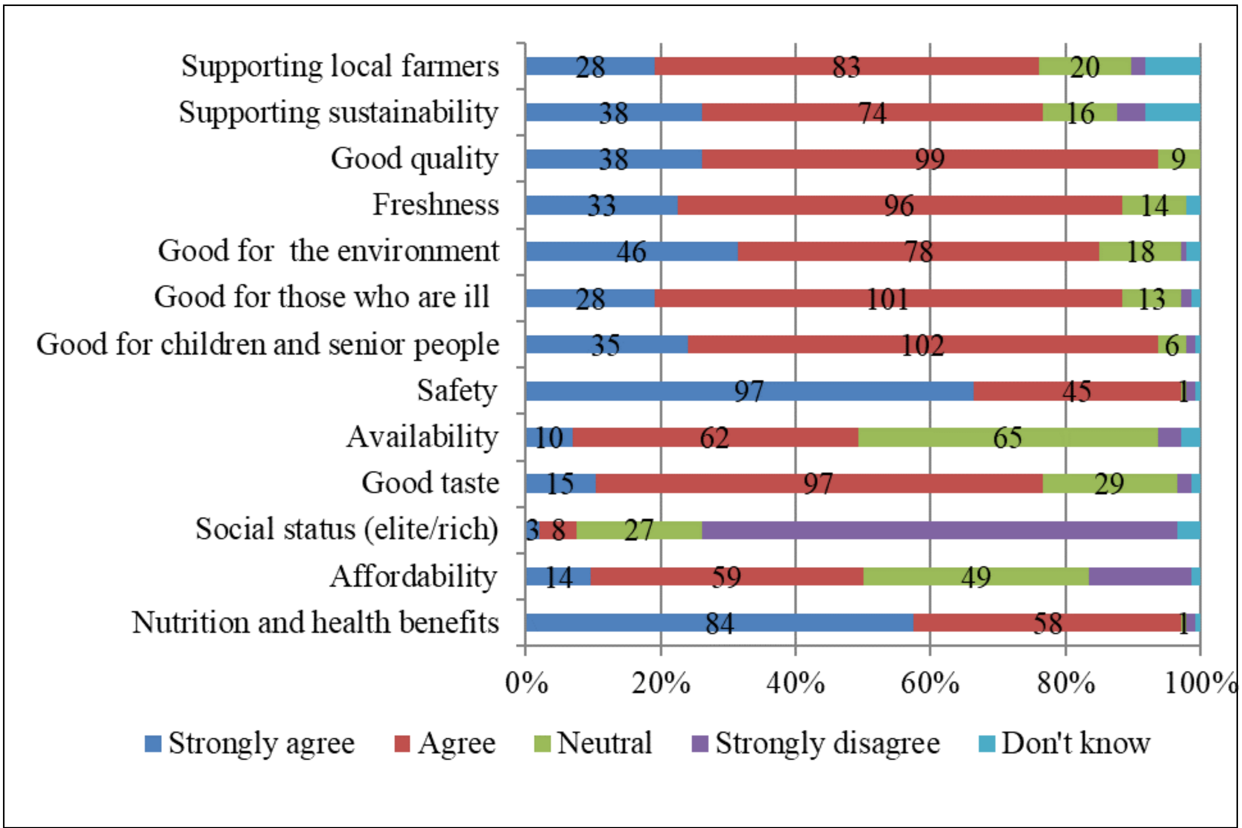
3.3.13. The level of actual consumption of organic/GAP products in Vietnam is also quite encouraging. 77.3% of respondents indicated that they had consumed both organic and GAP products in the past. 15.3% said they had consumed only organic products, and 4.7% said they had consumed only GAP products, 2.7% said they had consumed neither organic nor GAP products. Frequency of purchase also varied. A good number of consumers would only purchase organic and GAP products 'occasionally' (30.6% and 28.66% respectively), or at the other end, around 2-3 times a week (22% and 19.33% respectively). The most popular organic/GAP products consumed include vegetables, fruits, dairy milk and rice, as can be seen in the following figure. Most consumers preferred to go supermarket chains/stores or organic stores for their purchase of organic and GAP products, and not open air/street markets.

Types of organic/GAP products purchased in Vietnam



3.3.14. 64.66% of all respondents in Vietnam quoted "safety' as a 'strong' reason for choosing organic/GAP products, while 56% thought their strongest reason is 'nutritional/health benefits' of organic and GAP products. Other reasons many 'agreed' with include 'because organic/GAP products are good for children and senior people', 'because organic/GAP products are good for those who are ill', followed by 'good quality', and 'freshness', as could be seen in the following figure. Most indicated that they would 'very likely' continue consumption of organic products (72%) and GAP products (67.33%) in the future.

Reasons for choosing organic and GAP products in Vietnam



3.3.15. Finally, consumers' ability to recognize relevant logos and marks certifying organic and GAP products seems to be higher in Vietnam, as compared to both Cambodia and Myanmar. 94% of respondents could recognize the logos and marks being shown to them, and only 6% could not.

Images of VietGAP products

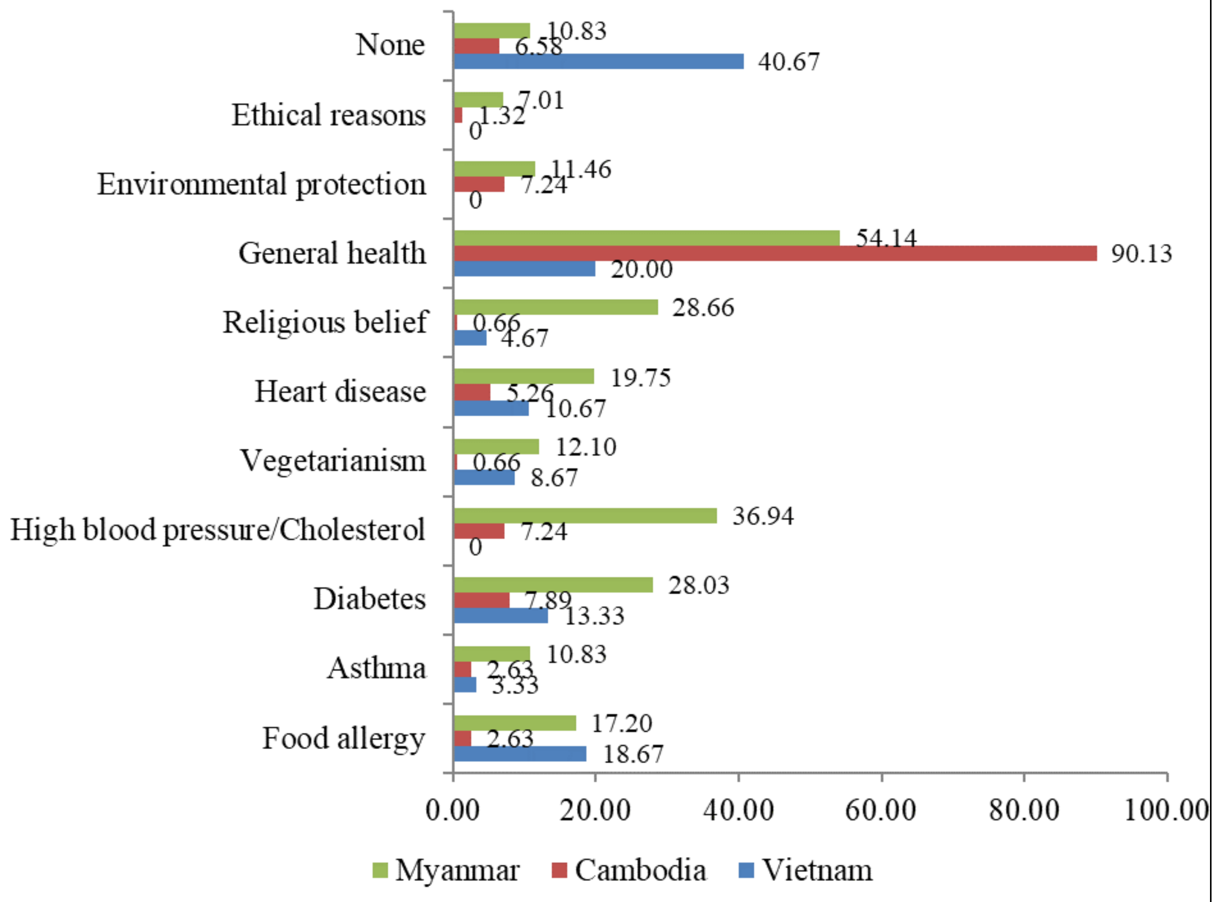
Images of organic food products in Vietnam

3.4. Comparative Analysis

Attitudes and perceptions towards buying and consuming organic and GAP products

3.4.1. In Cambodia and Myanmar, a majority of consumers quoted 'general health' as the main factor influencing their decision regarding purchase and consumption of food products (90.13% in Cambodia and 54.14% in Myanmar). This shows that consumers are becoming more health-conscious, which could be used as an entry-point to design awareness-raising campaigns for consumers. Consumers in Vietnam, on the other hand, tended to make more random decisions, with 40.67% of respondents stating that no factors in particular have influenced their purchase decisions. 'General health' (20%) and 'food allergy' (18.67%) were the two second most popular options for Vietnamese.

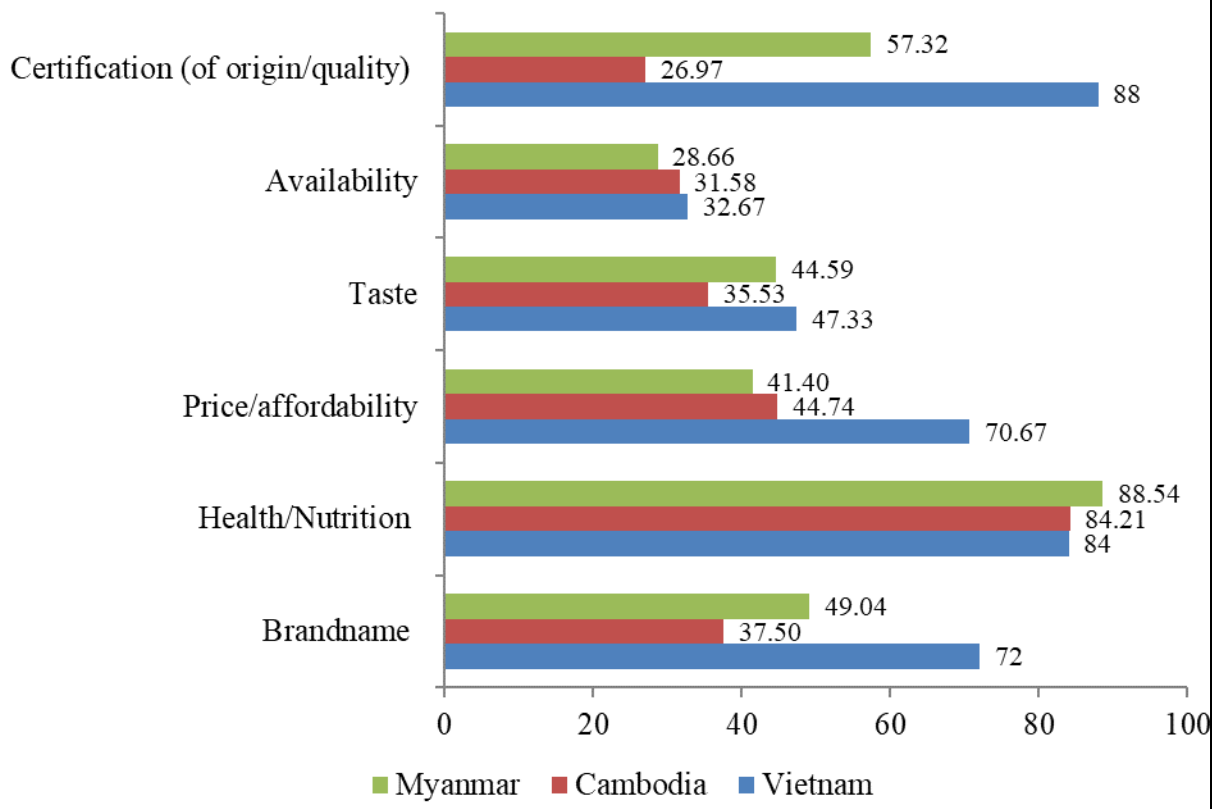
Question 9: Do you or any family members have any special needs/considerations listed below and therefore are more careful about choosing food products?



3.4.2. Most Vietnamese consumers, on the other hand, considered product quality and safety as 'very important' and 'important' elements that they would consider while purchasing foodstuffs. They considered 'affordability' as an important factor (70.67%) but would not care for buying products which are 'on sale'. As a result, 'certification of origin and quality' (88%) and 'brand-name' (72%) featured high on their radars. Cambodian and Myanmar consumers also paid a lot of attention to product quality and safety, via factors such as 'certification' (26.97% in Cambodia and 57.32% in Myanmar) and 'brand-name' (37.50% in

Cambodia and 49.04% in Myanmar), but were more price-conscious and were interested in getting discounts/products which are on sale (44.47% in Cambodia, and 41.40% in Myanmar).

Question 11: When purchasing food products in general, what would you take into consideration? (MORE THAN ONE POSSIBLE)



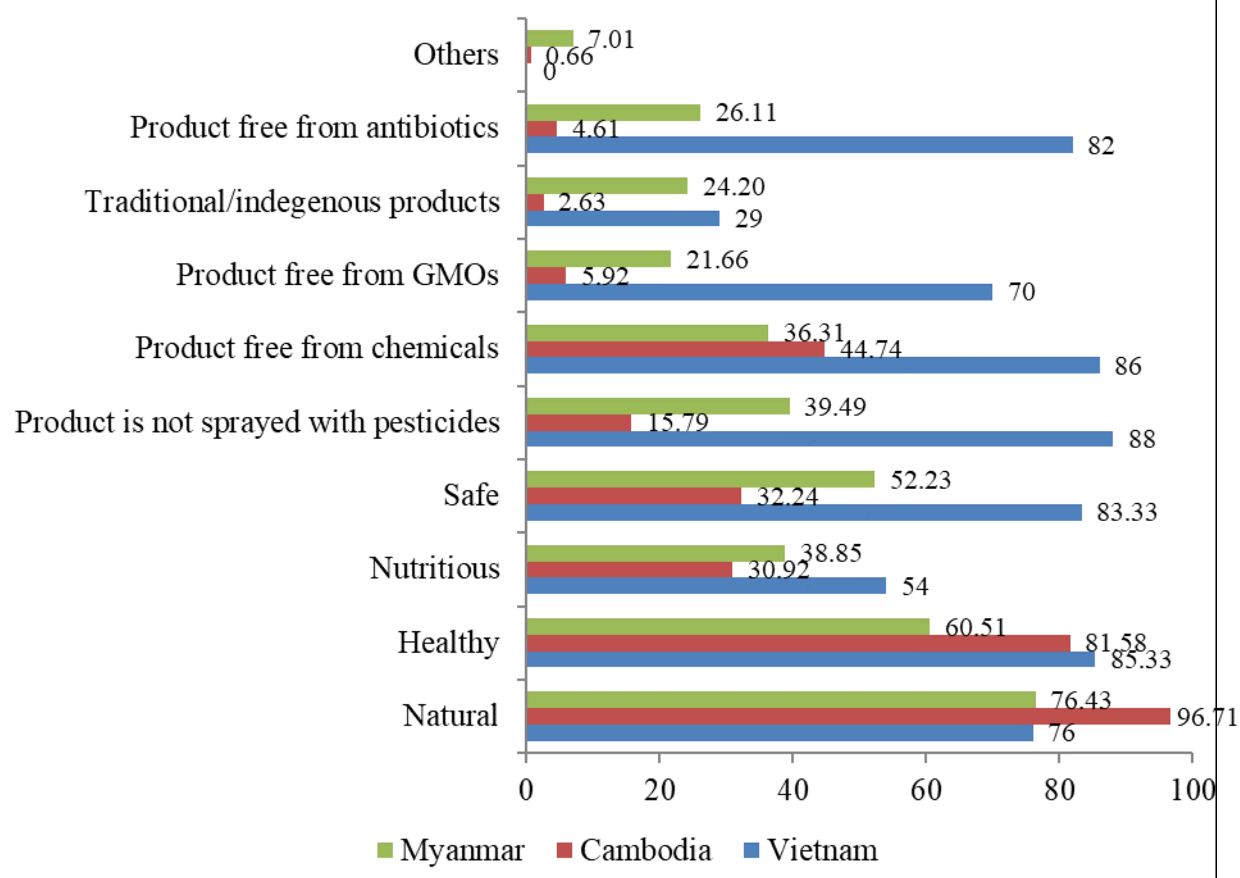
Consumer awareness and knowledge of organic and GAP products in ASEAN

3.4.3. Consumers in all three countries indicated a fair level of awareness/knowledge about organic and GAP products, considering:

- Organic foods to be ‘safe’, ‘free from antibiotics’, ‘free from chemicals’, ‘not sprayed with pesticides’, ‘natural’, ‘healthy’, and ‘non-GMO’ (genetically-modified organisms).
- GAP as associated with ‘sustainable farming methods’, ‘free from antibiotics’, non-GMO, ‘free from chemicals’, ‘not sprayed with pesticides’, and ‘safety’.

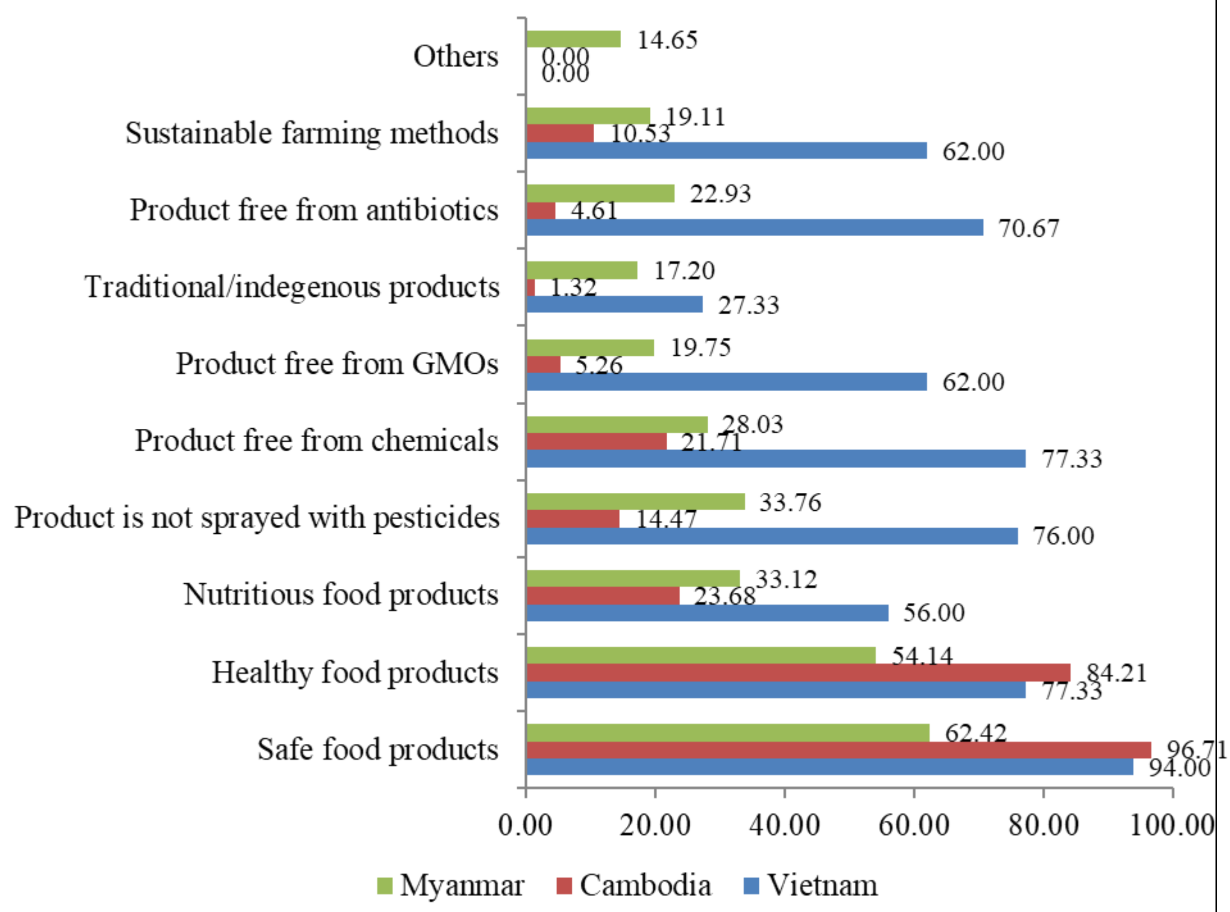
3.4.4. However, the general level of awareness in Vietnam seemed to be higher than in Cambodia and Myanmar, where consumers mostly associated these concepts only with ‘safety’ (32.24% in Cambodia, 52.23% in Myanmar, and 83.33% in Vietnam – for organic products) (96.71% in Cambodia, 62.42% in Myanmar, and 94% in Vietnamese – for GAP products), ‘natural’ (96.71% in Cambodia, 76.43% in Myanmar, and 76% in Vietnam – for organic products) as well as ‘healthy products’ (81.58% in Cambodia, 60.51% in Myanmar, and 85.33% in Vietnam – for organic products) (84.21% in Cambodia, 54.14% in Myanmar, and 77.33% in Vietnam – for GAP products). A fair share of Vietnamese respondents were able to make the connection between organic products, for example, and other relevant factors such as ‘products free from anti-biotic’ (82%), ‘non-GMO products’ (70%), ‘products free from chemicals’ (86%), and ‘products not sprayed with pesticides’ (88%).

Question 12: What do you think the term <u>‘organic’</u> food means? (MORE THAN ONE OPTION POSSIBLE)



3.4.5. A fair number in all three countries still mistakenly considered ‘organic’ and GAP products as ‘traditional/indigenous products’ (24.20% in the case of Myanmar, and 29% in the case of Vietnam for organic products) (17.20% in the case of Myanmar, and 27.33% in the case of Vietnam for GAP products) or ‘nutritious products’ (30.92% in Cambodia, 38.85% in Myanmar, and 54% in Vietnam – for organic products) (23.68% in Cambodia, 33.12% in Myanmar, and 56% in Vietnam – for GAP products).

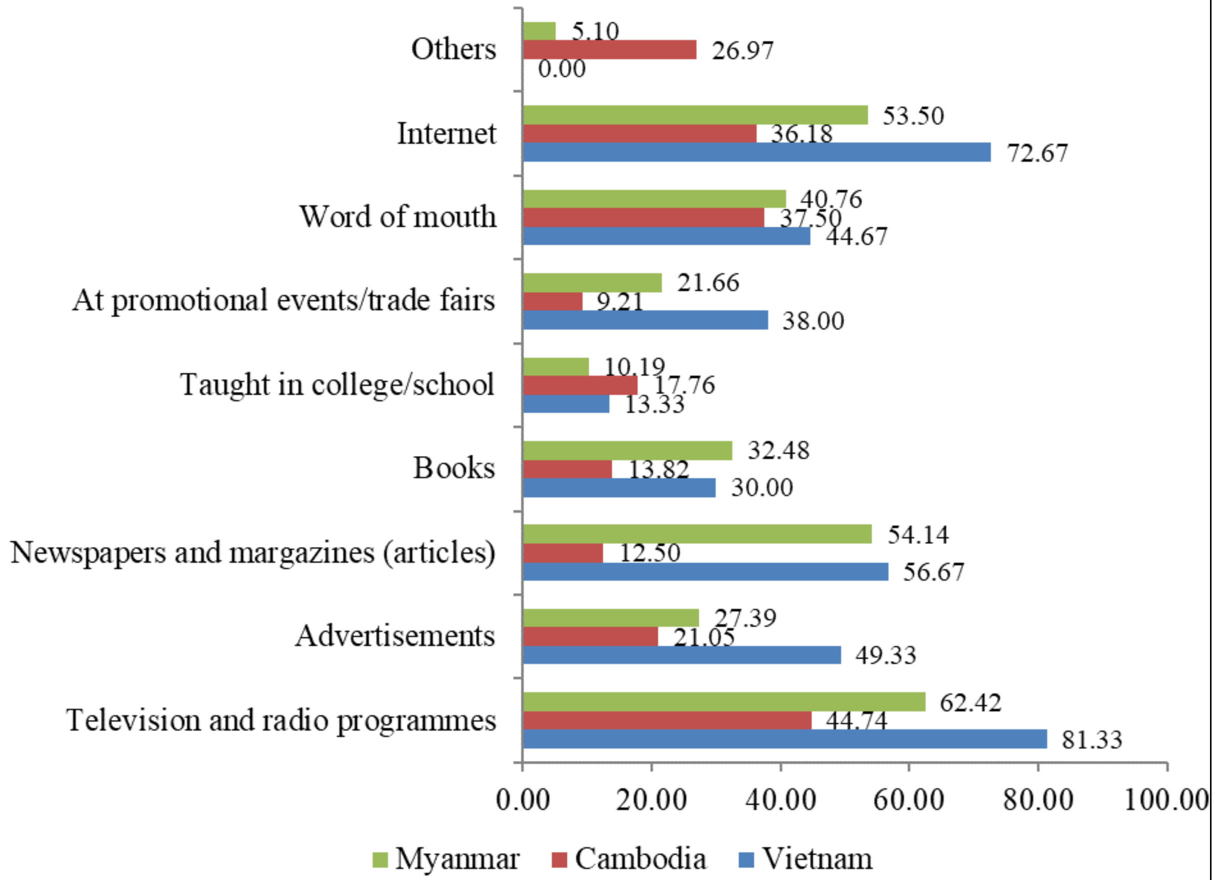
Question 14: What do you think the term <u>'good agricultural practices' (GAP)</u> refers to? (MORE THAN ONE OPTION POSSIBLE)



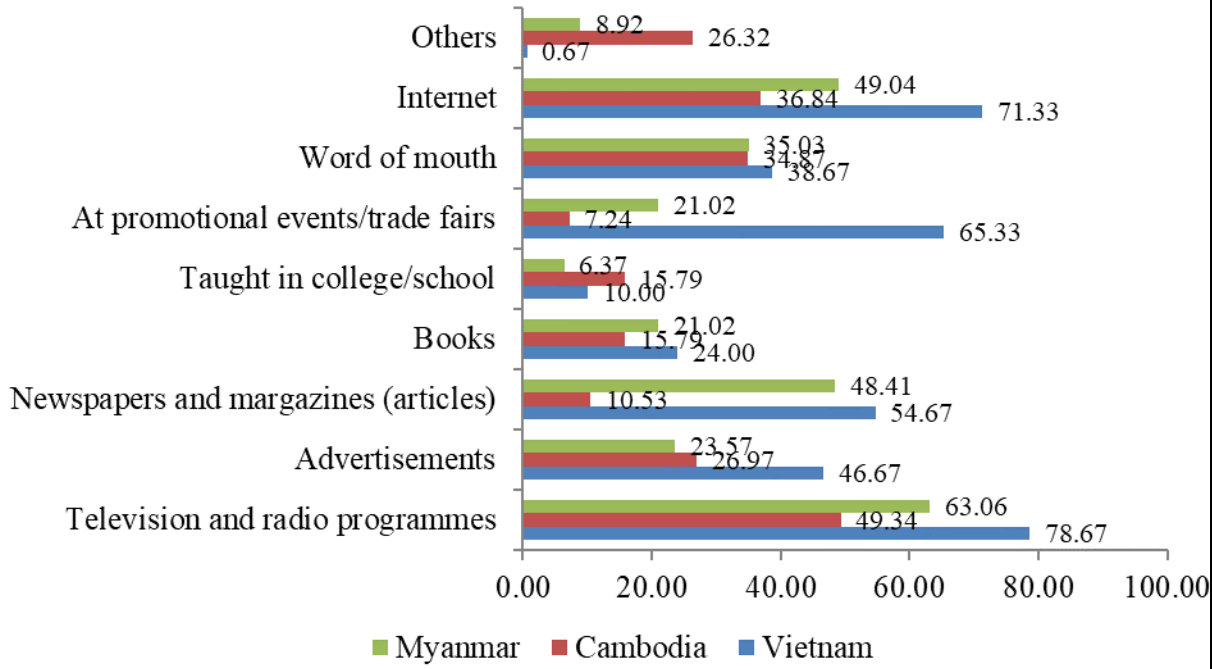
Consumer sources of information concerning organic and GAP products

3.4.6. In all three countries, 'the Internet' (36.18% in Cambodia, 53.50% in Myanmar, and 72.67% in Vietnam - for organic products) (36.84% in Cambodia, 49.04% in Myanmar, and 71.33% in Vietnam – for GAP products) and 'television/radio programmes' (44.74% in Cambodia, 62.42% in Myanmar, and 81.33% in Vietnam – for organic products) (49.34% in Cambodia, 63.06% in Myanmar, and 78.67% in Vietnam – for GAP products) constituted important sources of information for consumers.

Question 13: From where did you get your information about organic products? (MORE THAN ONE OPTION POSSIBLE)



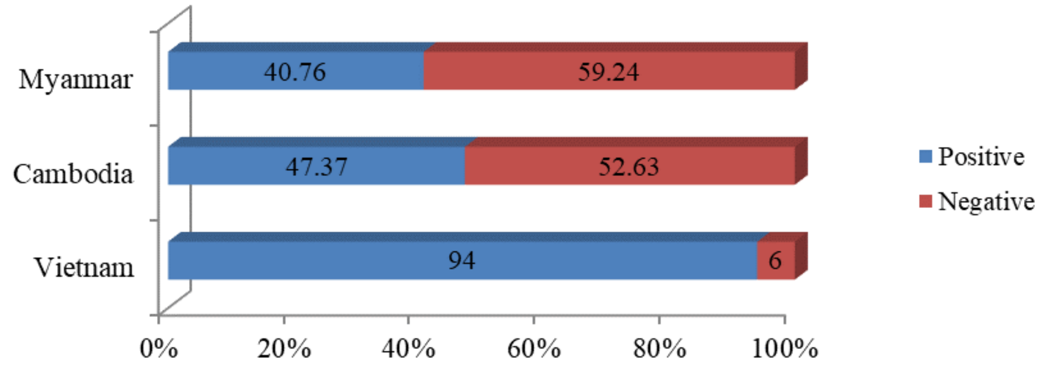
3.4.7. Ranked next in terms of popularity were 'words-of-mouth' (37.50% in Cambodia, 40.67% in Myanmar, and 44.67% in Vietnam – for organic products) (34.87% in Cambodia, 35.03% in Myanmar, and 38.67% in Vietnam for GAP products) and 'newspaper/magazine articles' (12.50% in Cambodia, 54.14% in Myanmar, and 56.67% in Vietnam – for organic products) (10.53% in Cambodia, 48.81% in Myanmar, and 54.67% in Vietnam – for GAP products). Consumers did not seem to trust advertisements as well as information provided at trade fairs/promotional events. This should be taken into account while designing information programmes for consumers on organic and GAP products in the future.

Question 15: From where did you get your information about GAP products? (MORE THAN ONE OPTION POSSIBLE)


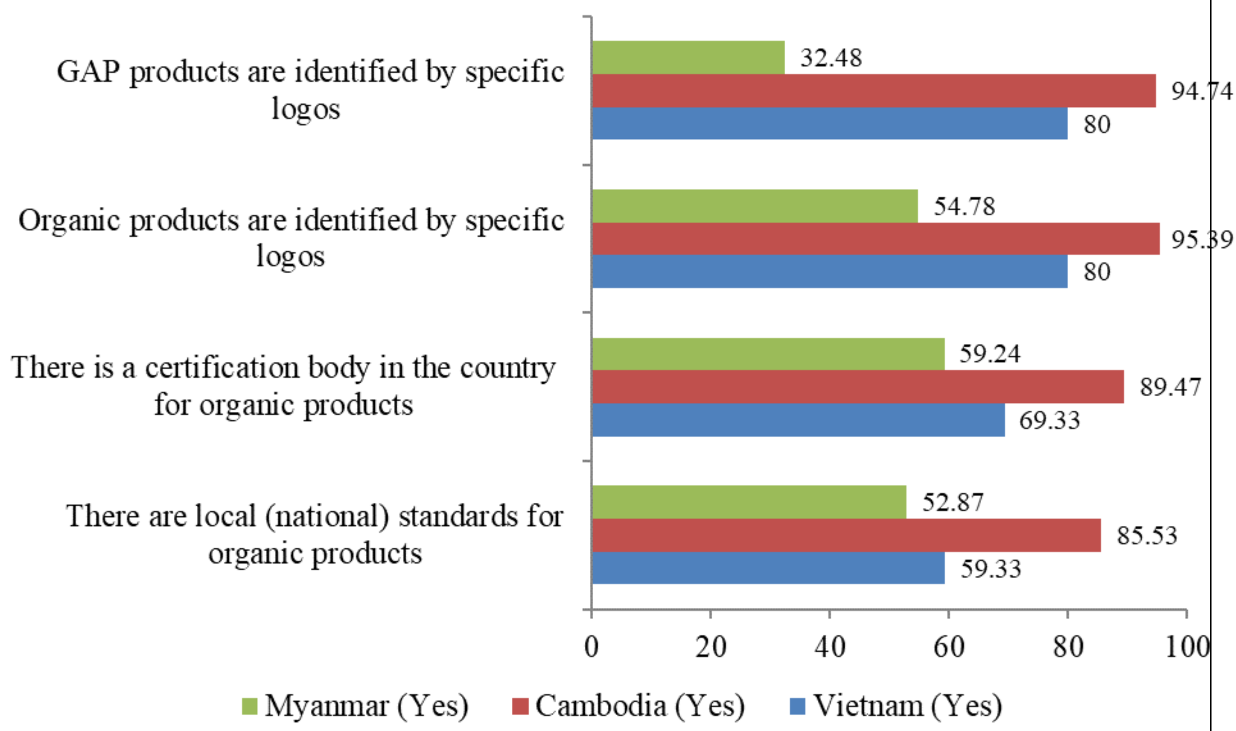
Recognition of identifiable and associated trademarks or labels for organic and GAP products

3.4.8. The number of Vietnamese consumers who could identify trademarks, labels or logos for organic and GAP products is higher (94%). They were also more aware about the existence of standards, certification and certification bodies (ranging between 70-80%). Coming second were Cambodian consumers, around 47-53% were able/not able to recognise relevant labels or logos, but seemed to be fairly aware of the general existence of standards, certification and certification bodies (ranging between 85-95%). A majority of Burmese consumers could not identify relevant logos, labels and marks (60%), and not many were aware of the general existence of standards, certification and certification bodies in their country (ranging between 32-60%).

Question 23: Have you seen any of the following logos/marks?



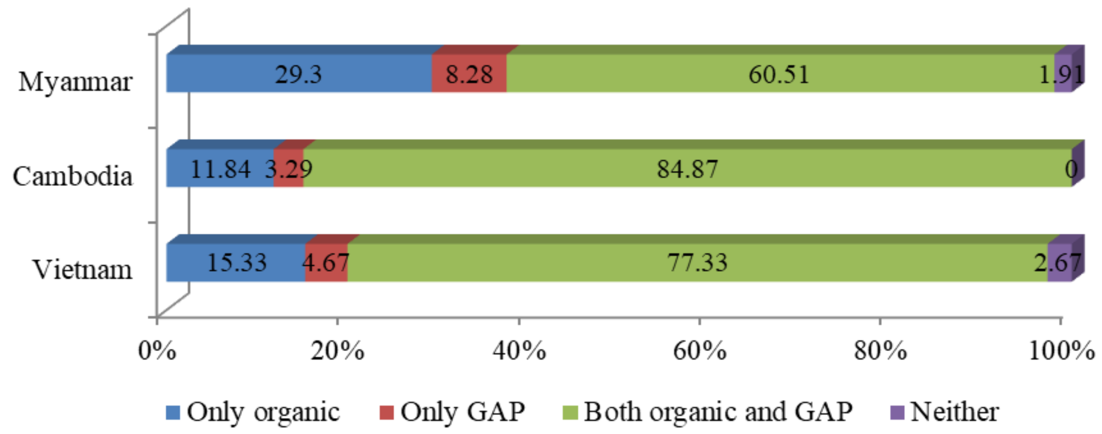
Question 16: Can you tell me if you are aware of the following statements?



Willingness and motivation for buying and consuming organic or GAP products

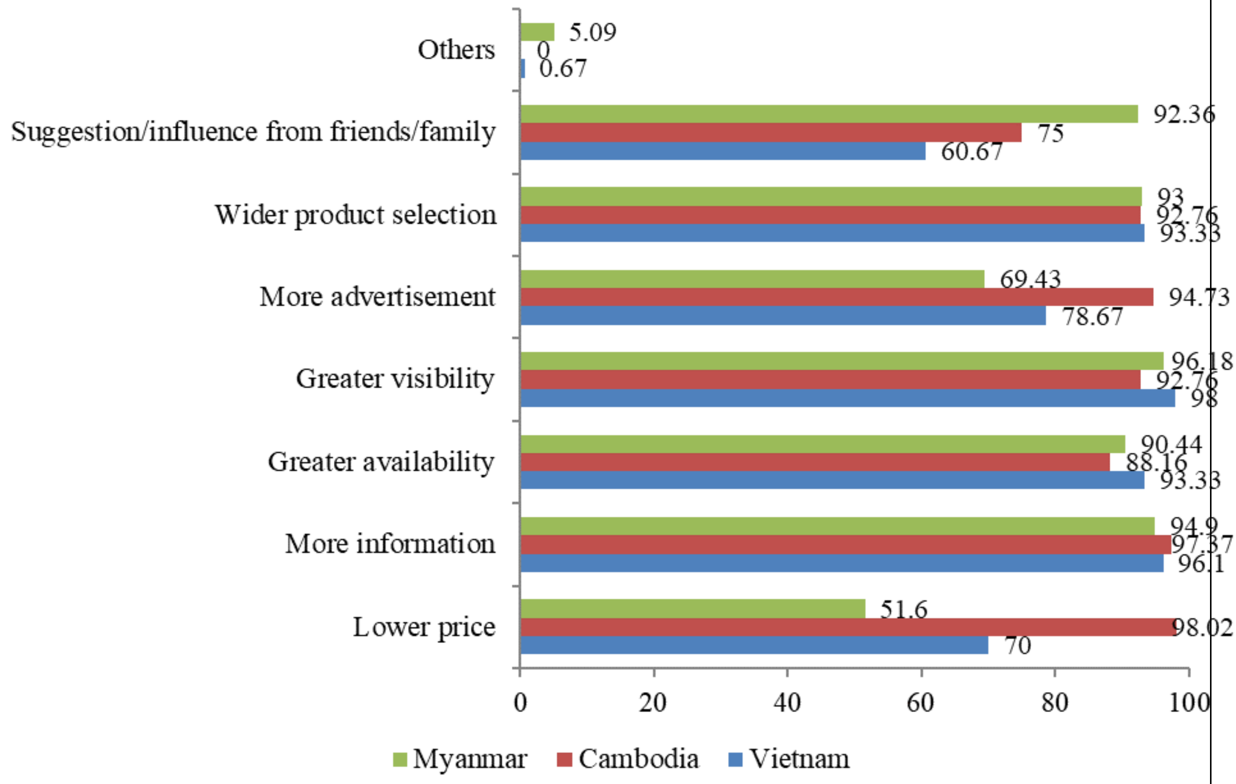
3.4.9. Consumers in all three countries seemed to favour/willing to purchase and consume organic products more than GAP or local products. Specifically, in Cambodia, 11.84% of respondents had actually consumed organic products as compared to only 3.29% for GAP products. In Myanmar, the corresponding rates were 29.3% as compared to 8.28%, whereas for Vietnam, the rates were 15.33% as compared to 4.67%. A good sign was that the proportions of consumers who indicated that they had actually consumed both organic and GAP products were quite high in all three countries: 84.87% in Cambodia, 60.51% in Myanmar, and 77.33% in Vietnam. This finding is in line with our initial hypothesis that consumers in ASEAN are growing more concerned and vigilant about the provenance and quality of food that they consumed. Especially, middle-income consumers were more willing than those with lower income, due to rising disposable income which could finance a better living standard in all three countries.

Question 22a: Have you ever consumed___________________?



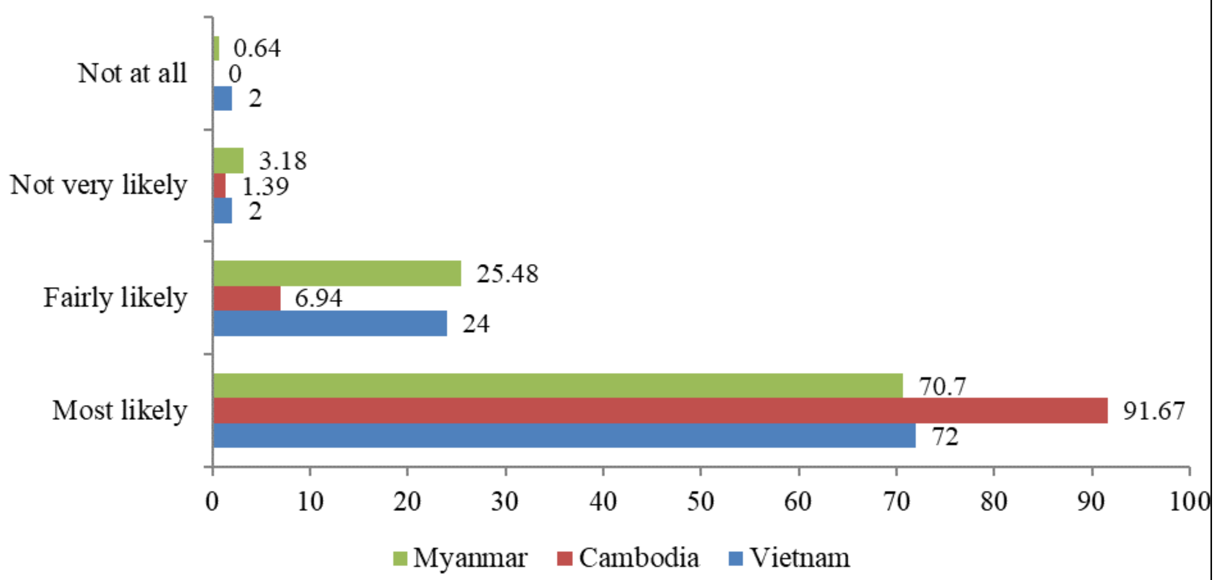
3.4.10. Motivations for consumers to buy and consume more organic or GAP products included greater availability, more information, more advertisement, and wider product selection, etc. Lower price was considered by a majority in all three countries as ‘important’ but not ‘very important’. Most motivations showed very high percentages in all three countries, as could be easily seen from the below figure.

Question 18: Whether you are presently buying organic/GAP products or not, please indicate how important each of the following factors would make you more likely to buy organic/GAP products?



3.4.11. In all three countries, most consumers would 'most likely' continue to purchase and consume organic and GAP products equally, as could be seen from the below figure.

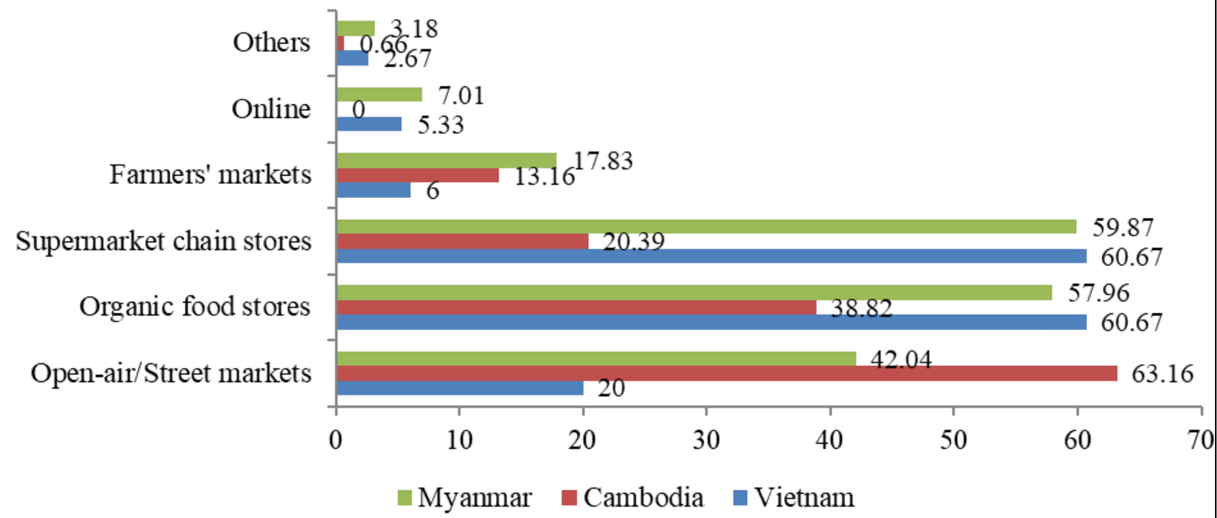
Question 27: How likely is it that you will buy / continue to buy organic/GAP-certified food in the future?



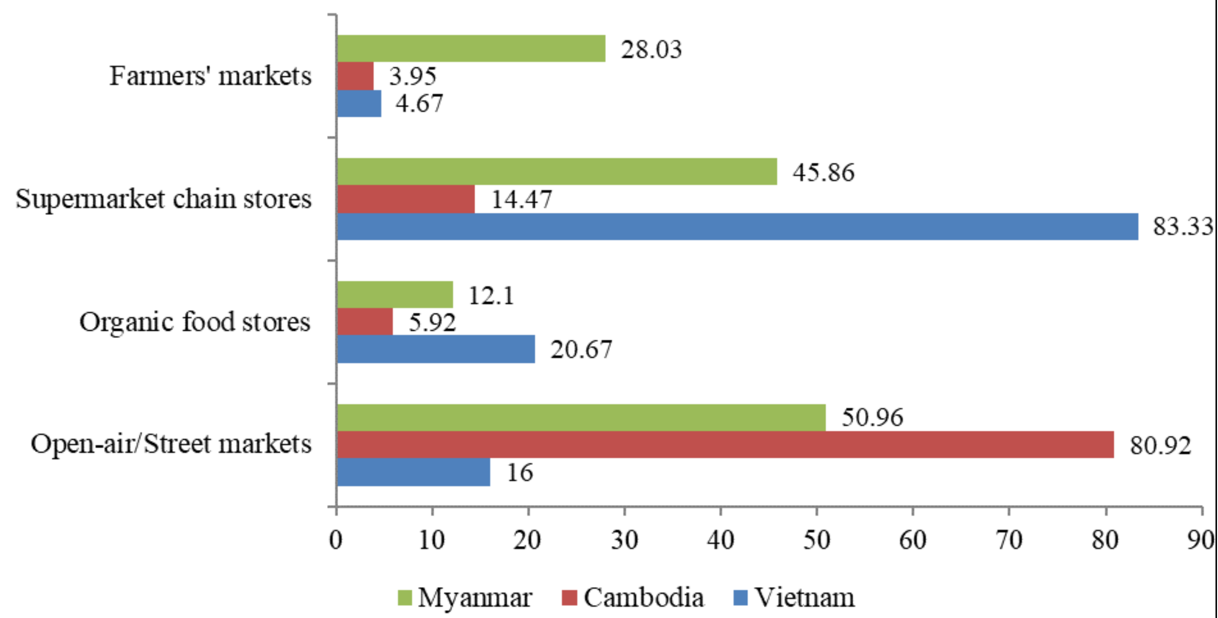
Preferred outlets for the purchase of organic and GAP products

3.4.12. Vietnamese consumers favoured supermarket chains/stores the most and very few would go to open-air/street markets to buy organic and GAP products: 60.67% and 83.33% of Vietnamese respondents would go to supermarket chains/stores for purchasing organic ad GAP products respectively. The opposite applied to Cambodian consumers, who would mostly go to open-air/street markets (63.16% for organic products, and 80.92% for GAP products); whereas Myanmar consumers favour both these two types of outlet equally.

Question 26: Where do you buy organic foods? (MULTIPLE ANSWERS ALLOWED)



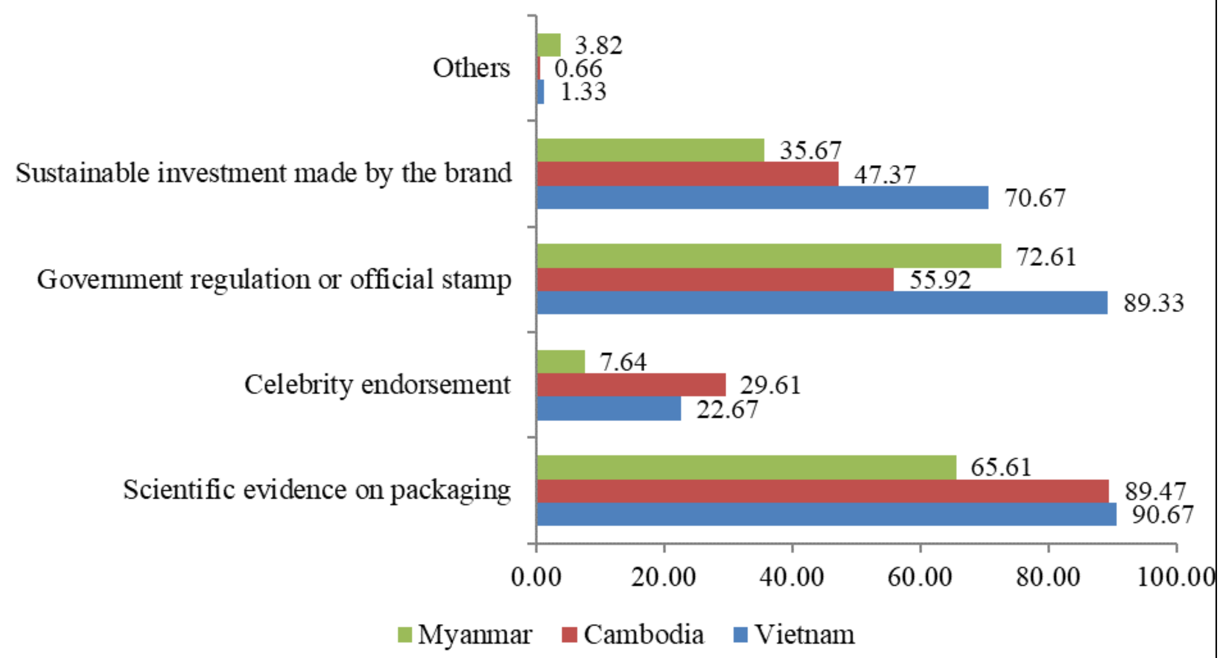
Question 26: Where do you buy GAP products? (MULTIPLE ANSWERS ALLOWED)



Trust regarding verification methods

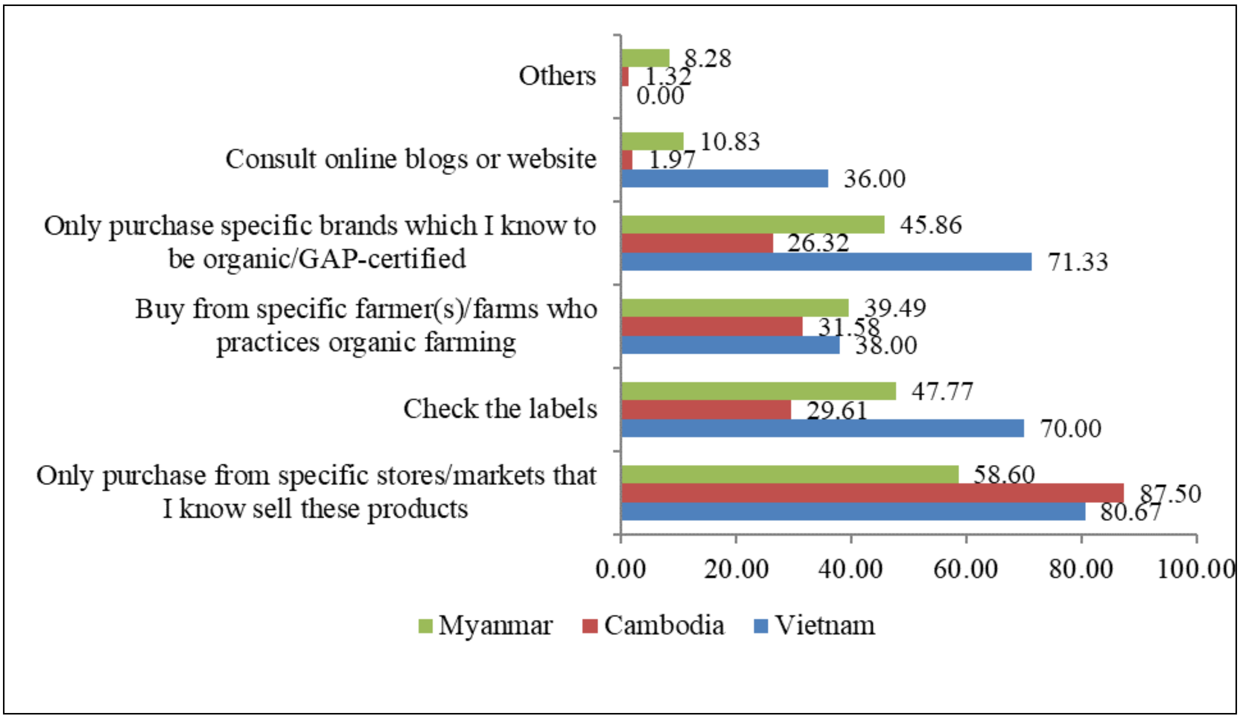
3.4.13. Consumers in all three countries would trust scientific evidence on packaging (logos, labels, marks) (89.47% in Cambodia, 65.61% in Myanmar, and 90.67% in Vietnam) as well as government regulation or official stamps (55.92% in Cambodia, 72.61% in Myanmar, and 89.33% in Vietnam) as the source of verification for organic and GAP products.

Question 19: What would help increase the level of trust towards products which claim to be organic/GAP-certified? (MULTIPLE ANSWERS POSSIBLE)



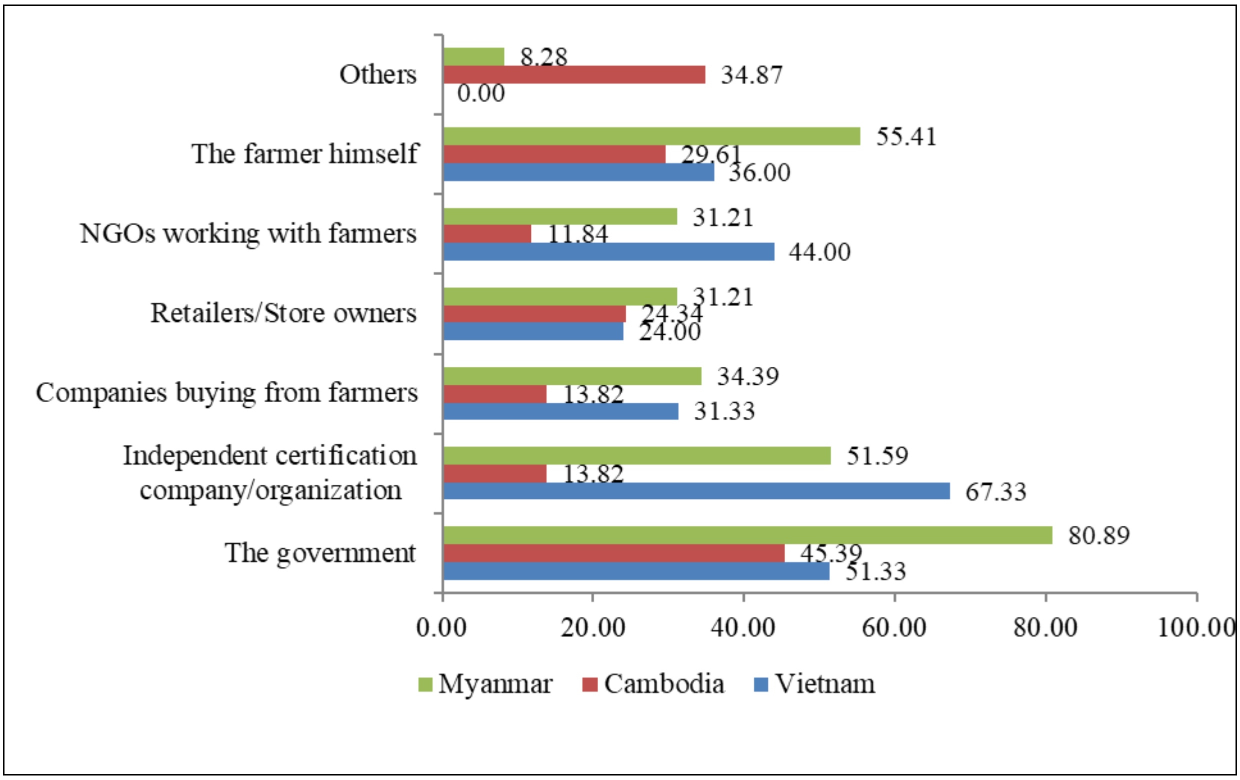
3.4.14. They would mostly go to stores that they trust (87.50% in Cambodia, 58.60% in Myanmar, and 80.67% in Vietnam) and buy brands that they are familiar with/recognizing as organic or GAP products (26.32% in Cambodia, 45.86% in Myanmar, and 71.33% in Vietnam), as well as check the labels (29.61% in Cambodia, 47.77% in Myanmar, and 70% in Vietnam) to make sure of the product quality.

Question 20: How would you verify or know if food you are buying/consuming are organic/GAP-certified?



3.4.15. In all cases, the government is most trusted as having the responsibility to provide verification (45.39% in Cambodia, 80.89% in Myanmar, and 51.33% in Vietnam) as well as independent certification bodies (13.82% in Cambodia, 51.59% in Myanmar, and 67.33% in Vietnam).

Question 21: Who do you think should be responsible for providing this verification?


Others
8.28
34.87
0.00
The farmer himself
55.41
29.61
36.00
NGOs working with farmers
31.21
11.84
44.00
Retailers/Store owners
31.21
24.34
24.00
Companies buying from farmers
34.39
13.82
31.33
Independent certification company/organization
51.59
13.82
67.33
The government
80.89
45.39
51.33
0.00
20.00
40.00
60.00
80.00
100.00
Myanmar
Cambodia
Vietnam

4. Conclusions & Recommendations

4.1. The survey results have clearly indicated the favorable perceptions and attitude that consumers in select countries in ASEAN held towards organic and GAP-certified food products. This might be explained by the severe food safety problems that these countries are currently faced with, leading consumers to be increasingly concerned about their own health and well-being as well as that of other members in their households, and thus turning them towards what they perceived as 'safer food'. Consumer's positive perceptions towards organic and GAP products indeed resulted a higher level of their actual consumption and willingness to continue purchase and consumption of these products in the future. Middle and higher income groups of consumers, in particular, showed higher consumption level and willingness to continue in the future, most likely due to the availability of disposable income.

VINASTAS

'VINASTAS was very pleased to participate in the Consumer Survey on Food Standards organized by CI during early 2018. This activity not only helped to strengthen our skills in conducting effective surveys, but also improved our knowledge regarding organic and GAP products. Food safety is becoming increasingly important for Vietnamese consumers nowadays. We plan to conduct similar surveys in the future where the knowledge and experiences gained through this survey could be applied.'

4.2. Overall, there is still limited awareness and knowledge. Many respondents did not know or were not sure what it was and even most of those who said they did were in reality not fully conversant with what the terms 'organic' and 'good agricultural practices' entails. A fair percentage of respondents in all three countries could not identify relevant marks and logos, even though they might know that organic and GAP products could be identified using specific logos, and might be able to recall the existence of standards and certification bodies in their countries. This means that consumer awareness concerning organic and GAP products remained largely intuitive and there is no/not much actual/solid knowledge on relevant matters.

4.3. There is therefore a clear need to raise the awareness of consumers in the survey countries regarding organic and GAP products, their benefits, the corresponding guarantee systems (standards and technical regulations; product labels, marks and logos; verification methods and agents), and sources of information, etc so that consumers could learn how to identify what are organic and GAP products and what are not. This could be done through various means and channels such as:

- Awareness raising seminars in collaboration with local consumer organizations, organic and/or GAP producers' associations and other relevant industry bodies;
- Publication and dissemination of leaflets and brochures (reader-friendly publications) on organic and GAP products, their benefits and how to identify them;
- Use of social media, websites, blogs and wiki (Internet-based media) and mass media (paper and electronic newspapers, radio talk shows or television programmes) to promote the use of organic and GAP products.

'Myanmar consumers are well aware of the magnitude of food safety problems in the country. Even though they know organic/GAP food products are good for health, most of them do not know what organic/GAP products mean. During the survey, it was found that even educated persons did not know the real definition of organic/GAP food products.

Therefore, MCU recommends awareness raising and advocacy activities for organic and GAP (Good Agricultural Practices) certified products in Myanmar to ensure food safety and traceability for consumer protection.'

4.4. The survey results have shown that what mattered more to consumers were quality, safety, availability, and health benefits, which rhymed well with what consumers associated with organic and GAP products (despite knowing exactly what these terms meant). Consumers have also shown the willingness to pay more for these products, and not caring so much whether these products were affordable or whether there were discounts or sales. This means that were consumers made fully aware of what organic and GAP products are and their benefits, they might be more inclined to increase and/or continue consumption. In fact, the motivations for consumers to buy and consume more organic or GAP products, according to survey results, included greater availability, more information, more advertisement, and wider product selection, etc. That means the market for organic and GAP food products in Southeast Asia has a lot of potential and thus there is much scope for producers to increase production and marketing, and bring more products closer to consumers in the market.

4.5. When probed about specific types of organic and GAP products that people most often bought, an overwhelming majority selected vegetables, fruits, then rice, eggs and dairy milks. Key motivating factors for consumption are 'general health' and safety; and these should be made into promotional pillars/key entry points for building or increasing organic and GAP products consumption in ASEAN. Price nevertheless might still be an important factor and should be looked into, given that the middle and higher-income consumers showed more willingness to purchase/consume, whereas the low-income and low-to-middle income consumers were less inclined. This might be because a large majority of population in the survey countries remain poor, even in big cities, probably with the exception of Vietnam.

4.6. Regarding trust in the verification methods, many respondents mentioned scientific evidence on packaging such as labels, stamps, logos and marks. This trust, however, did not exactly correspond to the consumers' capacity to recognise logos and marks, which calls for even more capacity building and awareness raising.

A Cambodian organic agriculture success story

Mrs. Thai Soda, 35 years old, is a mother of 3 children, living in Chrey Cheoung village, Kien Sangkei commune, Sotr Nikum district, Siem Reap province. Since over 10 years ago she has been collecting vegetables produced by local farmers in the district to sell in the district market and in Siem Reap town markets. This business allowed her to meet and know other sellers next to her selling stand, who sell imported vegetables.

Over the time, she started observing that these imported vegetable sellers often bought her vegetables for their own consumption though they still have their imported vegetables unsold. One day, Mrs. Soda decided to ask these neighbor sellers why they bought her vegetables and *did not use their vegetables, those sellers told her that they did not feel confident on these imported vegetables. This story made Mrs. Thai Soda become more and more conscious on the safety of vegetables that her family consumed, as she also observed that her relative family living next door who often bought and consumed imported vegetable which was cheaper as compared to local vegetable, often faced with health problems such as diarrhea, etc. In the market, she always heard consumers expressing their concerns whether the vegetables they bought were safe or not, how much pesticide residue remained therein. All these made her think how to encourage local farmers, who produce and supply vegetables to her, to apply safe production techniques, so that she can have safe vegetable for her family consumption.*

Fortunately, since the last 5 years, in the areas where Mrs. Thai Soda collects vegetables for selling, the APICI project of GRET and CIRD organizations has been providing support to farmers on safe vegetable production, as well as facilitating those producers who apply safe production techniques to have better market access, by linking them with collectors. After having learnt about this, Mrs. Thai Soda expressed her interest to join the project and she was selected as one amongst the 7 local collectors to collaborate with the APICI project. After having been trained and supported by GRET and CIRD on marketing, promotion as well as on how to improve her works with local safe vegetable producer groups supported by the project, she could find more and more clients including both individual consumers, restaurants and safe vegetable shops in Siem Reap town and later on also in Phnom Penh. She is currently working with a group of 64 safe vegetable producers (who produce vegetables following the techniques introduced by the APICI project and in compliance with safety standard – GAP controlled by the project team) in 3 communes of Sotr Nikum district. With the production of her producers group, she could supply around 200 Kg per day (in difficult season) to 600 Kg per day (in favorable season) to 3 restaurant and retailers in Siem Reap and 2 safe vegetable shops in Phnom Penh. Besides, around 15 to 20 individual consumers frequently order safe vegetable from her for their families' consumption.

Considering the higher demand for safe local vegetables as well as the strong motivation from Mrs. Thai Soda's group to go farther, the APICI project of GRET and CIRD recently supported the group to form the EcoFarm local enterprise as a safety label for her group. Having their own product label enables them to promote their product easier and raise consumer awareness.

5. Appendices

5.1. Survey Questionnaire in English

5.2. Data Sheet – Cambodia

5.3. Data Sheet – Myanmar

5.4. Data Sheet – Vietnam

5.5. Data Sheet – Three countries