



AID-FOR-TRADE CASE STORY

CAMBODIA

The Expansion and Diversification of Cambodia's Exports of Milled Rice

Date of Submission: May 5, 2011
Region: South East Asia
Country: Kingdom of Cambodia
Type: Building Trade Capacity
Author: Ministry of Commerce
Contact Details: H.E. PAN Sorasak
Secretary of State
Ministry of Commerce
Email: great_lake@camnet.com.kh
PAN.Sorasak@moc.gov.kh
Phone: +855 12 813 076
Fax: +855 23 866 425

Executive Summary

Rice production has grown rapidly in Cambodia in recent years. Until recently, all domestic surpluses were exported in the form of unprocessed paddy to Vietnam and Thailand, which, in turn, processed it, exported it in the form of milled rice, and captured most of the added value. Over the past three years or so, a small group of the largest and most dynamic Cambodian rice millers have taken the lead and begun exporting milled rice. From nearly no such export three or four years ago, exports in 2010-2011 will grow to 50,000 to 60,000 MT and might well be in the several hundred thousand MT within a couple of years.

To support the current push on export of milled rice, the Government adopted, in July 2010, a Rice Export Policy that focuses the efforts of concerned line ministries on removing remaining bottlenecks. The Policy sets out an ambitious target of 1 million MT exports of milled rice for 2015-2016. Besides benefiting the rice sector itself, the implementation and success of the Policy should provide invaluable lessons for the Government to develop similar policies for other potential agri-business export sectors targeted for expansion and diversification.

1. Issue Addressed

Thanks to significant improvements in yield, due largely to improvement in seeds, production of paddy rice in Cambodia has grown rapidly over the past few years – from about 4.5 million MT in 2003-2004 to 7.5 million MT in 2009-2010 and an expected 7.9 million MT in 2010-2011. Cambodia is now the world's 14th largest producer of paddy rice, behind Thailand (7th), Vietnam (5th) and Indonesia (3rd) among ASEAN countries. China and India are the two largest producers.

Together with a growing domestic supply, an increasing volume of Cambodian output is now being exported. Until recently, most Cambodian exports have been in the form of unprocessed paddy rice freshly cut in the field and trucked to Vietnam and Thailand where it is processed and then re-exported. Thailand and Vietnam are the world's two largest exporters. The vast majority of Cambodia's paddy exports is "informal" and poorly tracked using conventional trade statistics measuring techniques (official export data or mirror statistics from importing countries.) Accordingly, researchers use an approach based on total production and domestic consumption data to estimate, in turn, total output exported. See Table 1. In 2008-2009, nearly 1.6 million MT of paddy rice were estimated to have been exported from Cambodia, overwhelmingly in the form of paddy rice. By 2010-2011, that number is likely to be well over 2 million MT, with a growing portion of it in the form of milled rice.¹

¹ Many researchers have worked on the Cambodian rice value chain and there are differing estimates of paddy-equivalent volume of exports (formal and informal) ranging between 2 million and 3 million MT for 2009-2010. This case story uses estimates in the lower range as they seem more consistent with the range estimated by several of the largest millers and exporters, including Green Trade, for 2009-2010 and 2010-2011. Differences usually arise from differences in estimates of post-harvest losses and domestic consumption. Recent studies include, Tom Slayton, *A Road Map for Cambodian Rice Export, May 2009*; DAI, *Rice Sector Value Chain, 2008*; Gergely, Baris, and Meas, *An Economic Survey of the Rice Sector in Cambodia*, AFD, November 2010; and, MoC, Value Chain Unit, *Rice Sector Profile*, September 2010.

Cambodia's 2007 updated Diagnostic Trade Integration Study, *Cambodia Trade Integration Strategy 2007*, identified rice exports as one of 19 export potential sectors where it was felt that there are opportunities for Cambodia to diversify its current export base, including by moving up the value chain and expanding into new geographical markets.²

2. Objective Pursued

Cambodia's objective is to move away from being a major exporter of paddy rice into becoming a major exporter of milled rice, hence moving up the value chain, retaining an increasing share of value added, and moving away from its current dependency on low value exports to its two neighbors. A recent Government Policy sets out a target of 1 million MT of milled rice exports by 2015-2016.³ Interviews conducted, while preparing this case story, with several of the largest millers with milling capacity capable of meeting volumes and standards of importing countries suggest that export of several hundred thousand MT of milled rice might be quite achievable within a couple of years.

3. Challenges Encountered and Factors for Success

3.1 Expanding Export Supply Capacity of Milled Rice and Developing New Markets

For Cambodia to meet its target for vastly expanded exports of milled rice, a number of current bottlenecks will need to be addressed, among which some of the most important are:⁴

1. Improving productivity and quality of paddy;
2. Improving trade facilitation (lowering costs, including transportation costs, and shortening processing time);
3. Increasing rice milling capacity and quality and lowering milling costs (especially costs of energy);
4. Meeting importing market standards (quality and Sanitary and Phyto-sanitary [SPS])
5. Developing new overseas market contacts and contracts;
6. Increasing access to working capital for rice millers.

The quality and productivity of seeds has improved enormously in recent years. However, by most accounts, this is an area that still needs improvement. Water management and irrigation are also areas that remain in need of improvement and investment.

The average cost of export for a 20' container was \$732 from Cambodia in 2009 compared to \$704 Indonesia or \$625 in Thailand, two neighboring competing rice exporting countries.⁵ More importantly,

² Royal Government of Cambodia, *Cambodia Trade Integration Strategy 2007*, launched in Phnom Penh, December 2007

³ Royal Government of Cambodia, *Policy Paper on the Promotion of Paddy Production and Rice Export*, approved by the Council of Ministers, Phnom Penh, July 25, 2010

⁴ Value Chain Unit, Trade Promotion Department, Ministry of Commerce, *Rice Sector Profile and Strategy*, Phnom Penh: September 2010

⁵ IFC, *Doing Business 2011: Cambodia*, Washington, DC: 2011

inland costs of road transportation are high when compared to Thailand and Vietnam (\$15/MT/100km in Cambodia compared to \$4 in Thailand and \$7.5 in Vietnam.)⁶ Also, assuming the 1 million MT of exported milled rice is achieved and assuming 24 MT of milled rice per 20' container, some 42,000 or so additional containers would need to be processed through formal Customs and border inspection channels – a near 25% increase over today's approximately 180,000 containers (all categories) processed through formal inspection channels.⁷ Clearly this will require a scaling-up of various trade facilitation infrastructures.

Current 2010 milling capacity that can meet international export standards is limited to a few large Cambodian millers and is of the order of 50,000 to 60,000 MT. However, due to large new investments by three of the largest millers, that capacity might expand rather quickly to some 250,000 to 350,000 MT over the next 18 months or so. Production costs, especially the costs of electricity, may remain a factor unless rice millers are able to access alternative, cheaper sources of energy (including, using husks as energy-generating fuel.)

Export-oriented rice millers will also need to improve quality of their product and SPS standards to meet requirements of importing markets. On return from a recent mission to Europe (September 2010) financed jointly by AFD, UNDP-TRADE and GTZ, all Cambodian rice millers that participated to the trip pointed to this important lesson they had drawn from their visit.⁸ The new processing technology that is being put in place at the moment will help in that regard, especially in improving the quality of the milling (and lowering the percentage of broken rice.)

Interestingly enough, possibly one of the factors that may limit the rate at which rice millers are able to expand their exports is their ability to enter new markets and develop new business contacts and contracts. The recent focus has been on the European Union market due to the elimination of tariffs under EBA (effective September 2009). Some millers have also been able to develop contacts and export opportunities to Russia. Customs authorities in Sihanoukville indicate that over 90% of rice exports moving through the Port in 2010 were destined for the E.U. or Russia. Short term, these are good opportunities; long term, those are not large import markets.

EU countries import approximately 1 million MT of rice annually, compared to total world imports of approximately 33 million MT (2008-2009) – which is a rather small 3% of world imports. Volume of imports appears to be more or less stagnant over the past few years.⁹ Approximately 10% of EU countries' imports are of the Japonica variety; the other 90% of the Indica variety. Cambodia produces Indica. According to EU traders, perhaps Cambodia will be able to import up to 100,000 MT into the EU and another 40,000 MT to Russia. So other markets will need to be developed for Cambodian millers to export larger quantities. Some millers have begun exploring the US and African markets. There are

⁶ Royal Government of Cambodia, *Policy Paper on the Promotion of Paddy Production and Rice Export*, approved by the Council of Ministers, Phnom Penh, July 25, 2010

⁷ Estimate based on data and information provided by General Department for Customs and Excise (GDCE).

⁸ Dr. Ralf Muller, *Cambodian Rice Miller Mission to Europe, Mission Report*, MoC/TDP, October 2010

⁹ European Commission, *Agriculture and Rural Development: Rice*, 2011

opportunities also in Asia, including possibly through Government-to-Government agreements as in the case of the Philippines.

Tables 2 and 3 show the top 20 most attractive markets for “white rice” and “broken rice” respectively, based on an International Trade Center (ITC) methodology that combines the size of importing markets, the rate of growth in imports, and the tariff advantage enjoyed by Cambodian exporters compared to their most direct competitors. In general, they point to Africa, the Gulf countries, and other Asian countries as some of the most attractive new destinations.

Lastly, another key bottleneck will be access to working capital. While the largest rice millers seem able to finance new investment in milling capacity, one of the most significant hurdles they confront is access to the working capital they need to finance the purchase of paddy and to assist farmers with the purchase of seeds and fertilizers.

3.2. Government Coordination and Policy Support

To address a number of those issues, the Council of Ministers adopted a *Policy Paper on the Promotion of Paddy Production and Rice Export* on July 25, 2010. The Policy addresses the key issues highlighted above. It was drafted by SNEC (Supreme National Economic Council), which is the research arm of the Council of Ministers, under the leadership of the Ministry of Economy and Finance (MEF). Table 4 provides a summary look at the Policy.

To be effective, the Policy will require some degree of coordination among a number of line ministries. The Policy indicates that the Committee on Economic and Financial Policies will be responsible for monitoring and coordinating at the policy level, the Ministry of Agriculture, Forestry and Fisheries (MAFF) and Ministry of Commerce (MoC) will be responsible to implement many of the key measures, and MEF and the National Bank of Cambodia (NBC) to implement the financial components. At the moment, the Policy has a clear overall target (1 million MT exports of milled rice) and clear targets in term of increased financial support to the sector and operators within the sector. In other areas, the Policy does not have detailed performance targets for what might be expected from individual ministries and a clear mechanism to support a more direct monitoring of its implementation.

3.3. Aid for Trade

Over the years, Cambodia has received a large amount of aid from Australia and Japan at the farm level in particular, with a focus on seeds, harvest and post harvest handling, irrigation, yield and productivity, etc. This aid was critical in restarting an agricultural economy heavily dependent on rice and crippled by years of war and unrest.

More recently, UNDP Trade Related Assistance for Development and Equity (TRADE) project, IFC Agro-Processing Project (EU-Funded), GTZ, as well as AFD have focused on preparing rice millers to meeting the demands of importing markets and learning about those markets. Between 2008 and early 2011,

support has been provided by those donors to groups of rice millers to learn about and develop business contacts in the West African market (one mission) and the EU market (three missions). In addition, rice millers were brought to participate in a South-South buyer-seller market organized in Ho Chi Minh City back in the fall of 2009. Additional technical support to discover other African markets, Gulf country markets, and Asian markets would likely be quite useful in view of the challenges ahead.

IFC and the World Bank are looking into funding different financing mechanisms called for under the Rice Policy. AFD might join in some of those efforts. AFD together with UNDP financed a symposium on trade-related financing back in 2009 that help paved the way for some of the recommendations included in the Policy.

ADB and TDSP are and will be working on issues of technical standards and SPS, including in areas affecting rice exports.¹⁰

While AfT has been reasonably well targeted to issues demanding attention, coordination of AfT on the part of Government has been rather modest until recently in this particular area. The Agriculture SWAp and the Trade SWAp and even more so the Rice Export Policy are providing tools for Government to effect stronger AfT coordination.

3.4 Mitigating External Factors

Over the long term, demand for rice imports on world markets is a function of two factors: population growth and increasing per capita income. The former will tend to push up demand; the latter, to push it down. Over the short term, weather conditions will also affect import demand. These different factors are beyond Cambodia's control or that of its rice millers. Current 6 % rates of growth in world imports of rice are moderate, but still work in favor of Cambodian exporters.

Above and beyond the immediate business, recent exports to EU and Russia are providing Cambodian rice millers with important "learning curve" opportunities. However, it would be risky to assume that the current window of opportunity in those markets will last, unless Cambodia addresses some of the factors that currently undermine its competitiveness. Importers that are prepared to pay a slight premium initially to diversify their sources of supply may not be willing to pay such a premium over the medium or long term. As indicated, milling technology is improving and with it quality and SPS standards, but inland transport costs and costs of energy are high and significant negative factors.

In addition, Cambodia's current tariff advantage under EBA may not last if tariffs are also reduced for non-LDC competitors (including Thailand and Vietnam.) Another major competitive threat to Cambodian exports may come from no less than Myanmar which has enormous potential supply capacity and for which market access conditions might change if the political situation were to change.

¹⁰ TDSP, or Trade Development Support Program, has been designed to support some of the objectives of Cambodia's Trade SWAp and is executed by MoC. It is financed by the multi-donor trust fund (MDTF) administered by the World Bank and funded by the EU, Danida, and UNIDO.

Of course, the Government also needs to be concerned about possible sharp increases in world market prices which, in turn, may affect prices on the domestic market. So, there is always the possibility that temporary measures restricting exports might have to be introduced to prevent a sudden rise in the price of the country's most basic staple food – as it did back in the summer of 2009. Such measures are allowed under the WTO.

4. Results Achieved – Measurable Impacts

Cambodia is clearly at a turning point. Back in the mid-2000s, export of milled rice was insignificant. In 2009-2010, exports were about 20,000 MT;¹¹ in 2010-2011 they may reach 50,000 to 60,000 MT.¹² Exports anywhere between 250,000 to 500,000 MT would seem quite achievable within a couple of years.¹³

5. Lessons Learned

The shift from export of low-value paddy rice to high-value milled rice is turning into a success story of expansion and diversification of Cambodia's export basket.

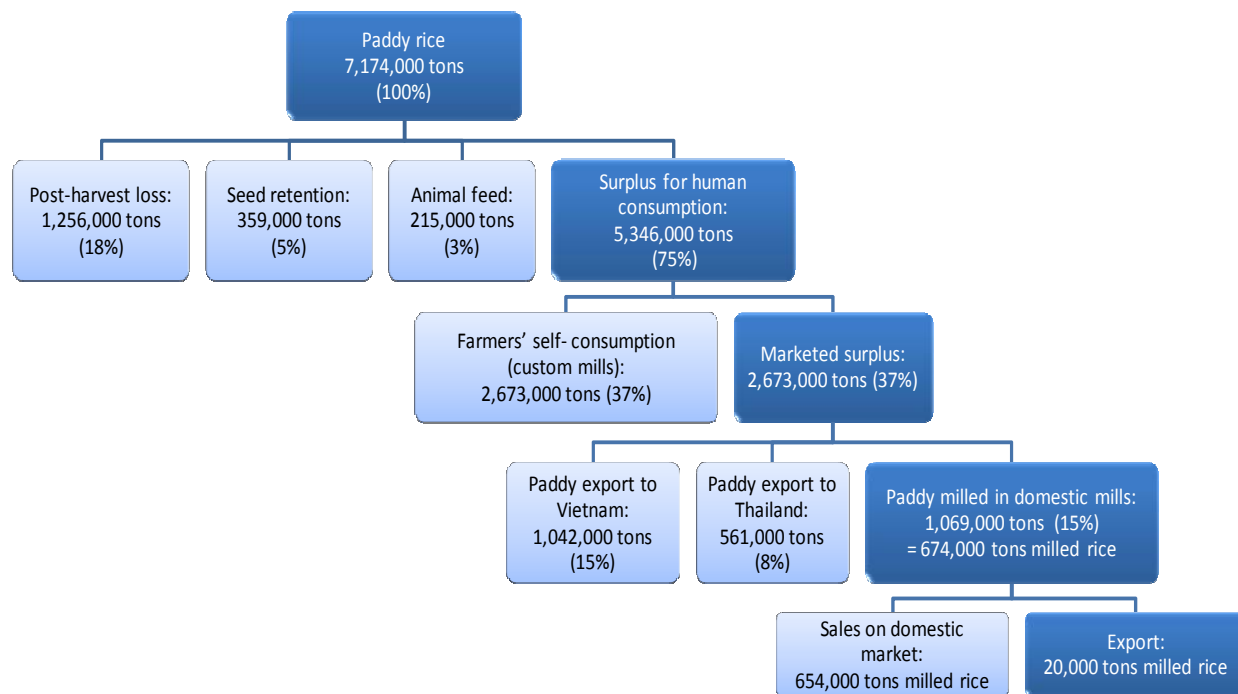
The Rice Export Policy could be a guide for similar sector policies in other areas of agri-business export opportunities. The lack of such policies in other sectors (e.g. cashew nuts, cassava, rubber, silk, others) means that business often lack the support they might need to become more effective and AfT may be less effective than it could be under stronger and clearer leadership from Government. Indeed, it is a concern raised by development partners themselves who would like to see more explicit, focused policies at the individual export sector level to provide better guidance for their aid.

¹¹ Estimate for 2009-2010 from Green Trade and from Gergely, Baris, and Meas, *An Economic Survey of the Rice Sector in Cambodia*, AFD, November 2010.

¹² Estimate for 2010-2011 from Green Trade and based on the rice milling capacity meeting international market standards in place in Cambodia as of late 2010 (approximately 55 MT/hour)

¹³ Based on field work: as of April 2011, one miller was opening a new mill with a capacity of 100 MT/hour and two other millers had plans to build two new mills with roughly comparable production capacity.

Table 1: Cambodia's Rice Value Chain (2008-2009)



Source: Tom Slayton, *A Road Map for Cambodian Rice Export*, May 2009; updated by Value Chain Information Unit, Ministry of Commerce

Table 2: Twenty Five Most Attractive Markets for Cambodian Milled Rice, 2008 (HS 100630)

Market	Cambodia's export to the market (1,000 USD)	Market total imports from the world	Share of market in world imports	Market growth in value (relative change)	Market growth in value (absolute change)	Tariff applied to Cambodia	Cambodia's tariff advantage (+) or disadvantage (-)	Main competitors in this market
1. U. Arab Emirates	0	1,498,984	9.0	40	813,356	0%	0%	India, Pakistan, Thailand
2. Iran	0	1,113,584	6.6	33	444,401	4%	0%	UAE, Pakistan, Uruguay
3. Saudi Arabia	0	1,145,412	6.8	21	612,550	0%	0%	India, Pakistan, USA
4. Philippines	0	1,951,065	11.6	65	1,688,738	50%	0%	Vietnam, Thailand, USA
5. United States	0	532,139	3.2	20	274,881	0%	1%	Thailand, India, China
6. Malaysia	599	653,763	3.9	48	517,485	40%	0%	Thailand, Vietnam, Pakistan
7. Benin	0	499,827	3.0	48	396,467	10%	0%	Thailand, Brazil, Pakistan
8. Bangladesh	0	503,015	3.0	29	319,772	5%	0%	India, Thailand, Pakistan
9. South Africa	0	446,339	2.7	22	244,044	0%	0%	Thailand, India, China
10. Oman	0	350,841	2.1	52	285,569	0%	0%	Pakistan, Thailand, UAE
11. Yemen	0	224,496	1.3	55.6	186,241	0%	0%	Thailand, India, Pakistan
12. United Kingdom	0	288,181	1.7			0%	0%	Italy, Netherlands, France
13. France	1,849	344,568	2.1	14	137,167	0%	7%	Italy, Thailand, Spain
14. Kuwait	0	243,706	1.5	32.6	163,846	0%	0%	India, Pakistan, Thailand
15. Côte d'Ivoire	0	331,958	2.0	18.8	165,219	10%	0%	Thailand, Vietnam, Pakistan
16. Germany	121	225,388	1.3	19.5	115,008	0%	7%	Italy, Thailand, Netherlands
17. Qatar	0	137,143	0.8	73.7	122,092	0%	0%	Pakistan, India, Thailand
18. Australia	0	157,603	0.9	40.2	116,868	0%	0%	Thailand, India, Pakistan
19. Russian Fed.	0	162,630	1.0	18.2	79,413	0%	21%	Thailand, Vietnam, China
20. Canada	0	240,711	1.4	15.7	106,265	0%	0%	USA, Thailand, India
21. Hong Kong	0	254,142	1.5	13.4	100,722	0%	0%	Thailand, China, Australia
22. Singapore	86	219,009	1.3	18	106,975	0%	0%	Thailand, India, Vietnam
23. Libya	0	112,023	0.7	75.8	100,238	0%	0%	Thailand, Egypt, Taiwan
24. Belarus	8	25,419	0.2	30.7	16,704	0%	17%	Pakistan, Vietnam, India
25. Italy	234	41,508	0.2	31.8	27,736	17%	3%	Thailand, Germany, France

Source: Value Chain Unit, Ministry of Commerce

Note: Attractive markets are identified based on a composite index that includes size of current imports by the country in 2008, the growth in imports during the period 2004-2008, the tariff applied to Cambodia and the tariff advantage/disadvantage for Cambodian rice millers compared to their most direct competitors in that market.

Note: While using 2004-2008 data, this and the next table adjust tariffs and **assume EBA's 0% tariff for Cambodia rice exports** to EU countries (which became effective September 2009.)

Table 3: Twenty Most Attractive Markets for Cambodian Broken Rice, 2008 (HS 100640)

Market	Market total imports from the world	Share of market in world imports	Import Growth 2004-2008	Tariff applied to Cambodia	Cambodia's tariff advantage (+) or disadvantage (-)	Main competitors in this market
1. Belgium	85,293	4.5	38.4	0%	12%	Netherlands, Thailand, Pakistan
2. Ghana	144,265	7.7	High	20%	0%	Thailand, United States, Vietnam
3. Côte d'Ivoire	136,297	7.3	31.7	10%	0%	Thailand, Vietnam, Pakistan
4. France	67,977	3.6	21.9	0%	9%	Thailand, Spain, Italy
5. United Kingdom	67,308	3.6	16.2	0%	11%	Spain, Thailand, United States
6. Senegal	568,428	30.3	25.1	10%	0%	Thailand, Vietnam, Brazil
7. Malaysia	82,764	4.4	116.2	40%	0%	Thailand, Vietnam, Pakistan
8. Mauritania	72,317	3.8	51.0	13%	0%	Thailand, Brazil, Belgium
9. Guinea	67,221	3.6	25.9	10%	0%	Thailand, Pakistan, Vietnam
10. Mali	40,287	2.1	39.3	10%	0%	Thailand, Japan, India
11. Germany	28,484	1.5	26.5	0%	13%	Netherlands, Thailand, United States
11. Netherlands	32,695	1.7		0%	4.5%	Italy, Thailand, Belgium
13. Japan	63,900	3.4	13.0	827%	0%	Thailand, United States, China
14. United States	22,973	1.2	114.2	0%	1%	Thailand, Mexico, China
15. Italy	7,351	0.4		0%	7.5%	Thailand, Belgium, United Kingdom
16. Niger	16,600	0.9	119.7	10%	0%	Thailand, Pakistan, Vietnam
17. UAE	7,617	0.4	110.5	0%	0%	Pakistan, Thailand, India
18. Indonesia	28,974	1.5	36.0	22%	0%	Thailand, Vietnam, Pakistan
19. South Africa	12,436	0.7	61.4	0%	0%	Vietnam, Thailand, India
20. Australia	13,064	0.7	45.3	0%	0%	Thailand, United States, Pakistan

Source: Value Chain Unit, Ministry of Commerce

Table 4: RGC's July 2010 Rice Policy at a Glance

	Main Issues (Selected Policy Measures)	Responsible Institutions
Rice Production		
Quick-Wins	Increase productivity by using high-yield seeds and modern production techniques (facilitate import of seeds and fertilizers, strengthen domestic seed production, review Ag. extension services, etc.)	MEF, MAFF
	Continue to expand irrigation (strengthen small scale irrigation schemes, irrigation maintenance, etc.)	MoWRAM, relevant ministries
	Maintain rural road, develop rural feeder network	MRD, relevant ministries
	Promote micro-credit	MEF, NBC
Medium/Long Term	Improve productivity and crop intensification (long term water management plan, rehab of Ag. stations and centers, R&D, etc.)	MoWRAM, MAFF
	Implement national policy for rural electrification	MIME, relevant ministries
	Establish and strengthen capacity of farmer organizations	MAFF, relevant ministries
	Promote and implement policy on sustainable use of Ag. land	MLMUPC, MAFF, MoP, relevant ministries
Paddy Rice Collection and Processing		
Quick-Wins	Encourage Private Sector participation in paddy production and processing (continue implementation of law on investment; improve as needed)	CDC, MEF, relevant ministries
	Improve financing paddy collection (recapitalize RDB with additional \$7 million; double ADSF capital from \$18 million to \$36 million; develop Credit Guarantee Scheme to guarantee loans from commercial banks to rice sector; set up Risk Sharing Facility for commercial banks to lend for Ag. processing)	MEF, NBC
	Provide treatment to Rice Miller Association similar to that extended to GMAC	RGC
Medium/Long Term	Create new financial instruments and leverage existing financing mechanisms (implement laws on secured transactions and financial leasing; develop credit information; consider creation of Ag. Development Bank)	MEF, MoC, NBC
	Develop "Open Paddy Market" (develop contract farming, promote market-driven rice production, paddy-based collateral loans)	MAFF, relevant ministries
	Lower electricity price and extend coverage (accelerate diversification of rural energy sources, improve EDC management, etc.)	MIME, EAC, EDC
Logistics		
Quick-Wins	Enhance trade facilitation, reduce informal fees, eliminate illegal check points (extend 'special treatment' similar to garment sector)	MEF/GDCE, MAFF, MoC/Camcontrol, relevant ministries

	Implement single-stop service for export processing (for issuance of SPS certificate, fumigation, grading and quality, weights and measures, customs declaration)	MEF/GDCE, MAFF, MoC/Camcontrol, MIME/ISC, relevant ministries
	Address grading and quality standards in compliance with internationally-recognized standards (define standards, create internationally accredited certifying body or encourage independent international institutions, etc.)	MIME/ISC, MAFF, MoC, Private Sector
	Encourage construction of bonded warehouse at PP port	MPWT, MEF
Medium/Long Term	Formulate strategic and legal framework with emphasis on SPS (law on SPS, related Anukrets and Prakas, establish clear division of responsibilities among line ministries, strengthen human and institutional resources, etc.)	MAFF, MoC, MoH, MIME
	Invest in infrastructure to reduce costs of exports (eg. accelerate renovation of Poipet-PP and PP-Sihanoukville railways, etc.)	MPWT, relevant ministries
	Facilitate financing for export(consider establishing export-import bank)	MEF, NBC
	Facilitate financing for infrastructure development	MEF, NBC
Marketing		
Quick-Wins	Explore export opportunities in regional and global markets (studies of potential import markets, lead mission to potential markets, explore Philippines, Indonesia, Brunei, etc.)	MoC, MFAIC
	Explore establishing rice market intelligence unit	MoC, MAFF, Private Sector
	Strengthen domestic market information sharing and monitoring	MoC, MAFF, MoWRAM, MRD
Medium/Long Term	Prepare strategic plan for Cambodia's rice sector to compete in regional and global markets (define objectives, identify markets, negotiate bilateral agreements, etc.)	MoC, MFAIC, relevant ministries

Source: Based on *Policy Paper on the Promotion of Paddy Production and Rice Export*, Council of Ministers, July 25, 2010