



SECTOR BRIEF CAMBODIA: Handicrafts



Current situation

The handicrafts sector in Cambodia is mainly dominated by small, NGO-driven social enterprises that provide employment to 20,000 professional artisans, including suppliers, end producers and traders. Silk weaving, as well as rattan and sedge weaving provide the most employment, with about 5,000 active weavers in each product group. They produce mats, baskets, furniture, home textiles, and scarves. About 3,000 people are employed at the production level by general handicraft Small and Medium Enterprises (SMEs) to manufacture other traditional handicrafts such as ceramics and lacquers, or collections of innovative jewellerys and fashion apparels.

This is in contrast to the high-volume factory handicraft production seen in countries like China and India, which often comes at a very high social and environmental cost. Cambodian artisans use locally sourced natural products, have a high social impact offering jobs inside their communities, and focus on quality as well as environmental impact. Smaller, more niche-oriented Cambodian retailers try to create a more exclusive experience to distinguish themselves from the big chains, focusing on more value-added products in the high-price segment.

Since the COVID-19 pandemic, goods have been mainly produced for export markets, as the tourism market dropped by 80% from 2019 to 2020. While 50% of the producers were still not fully operational in early 2022, the most resilient social enterprises in handicraft sectors have proven strong adaptability to the market by shifting successfully from the domestic tourism market to export markets. Most buyers see consumers favouring online sales, stronger social and environmental values, feeling good inside the home and investing in interior design. In 2021, buyers have shifted orders to Cambodia from other countries due to political unrest and the reopening of travel. Cambodia's handicrafts are not yet well known in Europe and the fact that the European handicraft market is expected to exhibit a Compound Annual Growth Rate of 10.9% during 2022–2027 means that there is huge potential for collaboration in this field.

Contemporary Cambodian Handicraft

Home Decoration

The national rattan industry contributes considerably to GDP in Cambodia, providing an annual income of around \$1.5 million to local livelihoods. It encompasses both semi-processed products and finished products including sofas, closets, hammocks, chairs, and beds that also make use of materials like bamboo, sedge, and water hyacinth. Production is mainly geared towards export with the main buyers being from Vietnam, China and Thailand. Hardly any basketry and furniture are currently exported to Europe.

The sector has recently seen positive developments, as Malaysia-based Lipp Engineering has announced plans to build a bamboo processing plant in Cambodia based on German technology to ship bio-oil and bamboo fibre abroad. Furthermore, Cambodia has set up a longstanding partnership with the Swedish brand Ikea on sustainable rattan production in recent years.

Ceramics

Cambodian pottery traditions date back to 5000 BCE and have remained in the province of Kompong Chhang. Potter's wheels, gas kilns and more sophisticated glazes are also used at present, and many new designs have been introduced for art objects and souvenir items. Yet all items are handcrafted: from the digging and production of the clay, to rolling, shaping, and painting. They focus on a niche segment: Ceramic tableware, kitchenware, other household articles and toilet articles.

In 2020, Cambodia exported handcrafted ceramics worth \$134,000, the main traditional importer being the USA. Since 2020, it has been surpassed by Mexico which now accounts for 80% of sales. No export is reported to Germany and most European countries yet.

Vegetal Lacquer

Dating back about three thousand years in China, the art of lacquer rapidly spread to Southeast-Asia and is thus one of the most ancient crafts in Asia. Some examples of these wares have survived in the form of gilded Buddha images and betel boxes in the shape of elephants, pumpkins, and more. In 1998, the European Union supported a program to revitalise traditional lacquerware in Cambodia and trained 350 young Cambodians.

As with other traditional crafts, artisans are beginning to experiment with different techniques and styles, adding rice grains, eggshells, rice stalks and sandstone chips for example, to produce modern and striking effects. Cambodian companies like Stocker Studio use not only vegetal lacquerware but also polychrome painting, eggshells and straw marquetry original techniques, which bring a true touch of luxury to boxes, bowls, furniture and wall-décor. In 2021, Cambodia exported around \$380,000 of lacquered furniture, decoration and pots.

Textiles

Cambodia's exports are dominated by garments and other textile goods which are mass-produced in large factories following the cut-make-trim model. As for the handicraft sector, two main categories of textile companies can be distinguished:

- Companies with a focus on weaving natural fibre including silk, cotton, lotus, banana, and kapok fibres (e.g. Samatoa Lotus textiles, Khmer Golden Silk, Cotton Club)
- Companies focusing on natural textile dyes (e.g. Institute Khmer Traditional Textile, Goel, Kei Khmer)

Silk is the most important textile fibre: Today in Cambodia, around 5,000 active looms produce silk fabric, scarves, cloth and other silk items, particularly in rural areas. Cambodian silk products are appreciated by tourists and foreign buyers for their various designs, quality and hand weaving techniques.

Benefiting from the abundance of natural fibre resources, its cheap labour cost, its cultural heritage and recent collaboration with western designers, Cambodia started to offer sustainable textiles that are now sold to the largest fashion brands (such as LVMH and Kering). Some companies specialise in producing natural cotton or natural silk using natural dyes that are mainly exported to Japan and South Korea. One company has trained 300 farmers and producers to manufacture rare and innovative textiles made from lotus, kapok and banana fibres.

Fashion Apparel

Many small and medium enterprises produce small series of ready to wear fashion clothing and accessories from high-end to luxury. Studios are equipped with expert tailors and are full service, offering yarn selection and finished product prototypes. Many workshops employing 10 to 50 dressmakers are specialised in producing small series of high-quality clothing or accessories such as handbags, scarves and purses.



Air-drying of newly dyed Cambodian silk scarves

Jewellery

Many local Cambodian social enterprises focus on recycling products such as spent cartridges and pieces of mines and bombs from the Cambodian post-civil war era. Local jewellers collect and upcycle them into beautifully cut brass rings. Brass that once carried a dark part of Cambodian history is now being turned into symbols of peace and resilience by local artisans, a stand against the violence that once overtook their country.

Other jewellery makers, such as Gardens of Desires, create fine luxury jewellery using more conventional raw materials like silver, gems and stones devoted to reviving a beloved artistic tradition and placing Khmer heritage at the forefront of global contemporary design.

Some social enterprises produce creations from coconut skin, handmade crochet beads, handmade polymer clay beads, handmade cotton wrap beads, sterling silver snake chains, and paper beads. Several fair-trade platforms sell Cambodian jewellery online, including Ten Thousand Villages and Oxfam.



Tassel earrings with brass chains made of used cartridges

Institutional Setup and Policy Framework

Handicraft Associations

Stakeholders of the Cambodian handicrafts sector are often organised in communities and associations. The Artisans' Association of Cambodia (AAC) plays a major role in federating NGOs, handicraft exporters, producers, and other stakeholders at all levels of the handicraft sector. AAC aims to leverage the potential of high-quality handicraft products which includes high social and environmental values and accompanying NGOs to convert into social enterprises with long-term vision. It is a national representative of the handicraft sector and a member of the World Fair Trade Organisation (WFTO), advocating for better policies to institutions and ministries and strengthening the capacity of local associations (e.g. by design capacity development and lobbying for improved framework conditions).

A second major player in the sector is the Rattan and Bamboo Association of Cambodia. Also being a member of the WFTO and supported by World Wildlife Fund (WWF) and recently USAID,

it federates 12 communities in three provinces: Koh Kong, Preah Sihanouk, and Kampot, each being composed of 300 to 500 families with 11 SMEs as members.

Policy and Regulations

Cambodian handicraft exporters have already aligned with competitor Vietnam regarding hand-made product quality, design and reliability. There is not much difference regarding these criteria anymore. However, SMEs in the handicraft sector are particularly affected by the lack of transparency and enforcement in the regulatory regime, and struggle with the complexity regarding regulations and standards, i.e., registration, technical measures, licensing, certification, and export processes. The weakest points that the government commits to tackle are transport costs, price, service, and supply quantities.

Furthermore, engaging and building more trust with small business communities in a consistent, transparent, and supportive manner will improve the business formalisation process, which is the first important stepping stone for handicraft companies in accessing adequate financing and fostering their internationalisation. Enabling a business environment for matching between local SMEs and foreign firms is equally important.

EU Market requirements

Exporters to the EU must comply with a number of legal requirements for different product categories. The EU General Product Safety Directive states that all products sold in the EU must be safe and provides a general framework, even if no specific regulations apply. The Convention on International Trade in Endangered Species (CITES) has to be respected if products are made from wild plants or animal products.

Fair wages, good working conditions and respecting environmental standards are requested by many importers, some requiring fair trade standards to be fulfilled. The exporter must not necessarily be certified but has to prove compliance with fair trade criteria. Yet, the application of standards is increasingly important. Physical and social protection of workers, work safety training (such as wearing masks during the application of dyes) and the payment of at least minimum wages is a concern for most buyers. Importers refer to the main standards recently available in Cambodia: International Fair Trade Certification by the WFTO, National Fair Trade attestation by AAC, OEKO-TEX, Fair Wear Foundation Code of Labour Practice, Global Recycled Standard (GRS), and Global Organic Textile Standard (GOTS).

The main market trends for home decoration and home textiles in Europe are currently the trends for individuality and originality, functional and appealing products from emerging markets, sustainable, ecological and fair products, as well as a growing importance of alternative trade channels such as direct supply. Value chain integration is on the rise. The market demands closer cooperation, greater efficiency, transparency along the supply chain and shorter lead times.

Product Group	Banned Substances	Restricted Substances	Further Requirements
Textiles and fashion items	Chemical dyes with heavy metals (AZO dyes)	Max. Pentachlorophenol (PCP) concentration: 5 mg/kg since 2021	Traceability Indication of fibre composition, washing instructions and country of origin, sewed firmly to product
Jewellery	Nickel	Max. Cadmium concentration in jewellery: 0.01% Max. Lead concentration in jewellery: 0.05%	Silver jewellery must be made of lead-free 92.5% sterling silver
Basketry	Creosote substances and arsenic for fumigation AZO dyes		Adhere to the General Product Safety Directive and REACH (Registration, Evaluation, Authorisation and Restriction of Chemicals)
Packing		Max. Cadmium concentration in plastic bags: 0.01% Max. Dimethyl Fumarate concentration in packaging materials: 0.1%	Respect packaging waste legislation, in particular requirements for wood packaging materials (WPM)
Leather		Max. chromium VI concentration: 5 µg/m ³	

Table 1: EU requirements relating to product groups in the handicraft sector

Investment Incentives

The Cambodian government has made it a priority to attract investment from abroad. Foreign Direct Investment (FDI) incentives are available to investors, including 100% foreign ownership of companies, corporate tax holidays of up to 8 years (20% after the incentive period ends), duty-free import of capital goods, and no restrictions on capital repatriation.

For 20 years, social impact investment has allowed the creation of many Cambodian social enterprises with a bicultural approach (Artisans Angkor, Cotton Club, Salasusu, Samatoa, Manava), training more than 3,000 artisans in high value jobs and generating \$20 million every year before COVID-19. The main impact investors currently active in Cambodia are BlueOrchard, Insector, Nexus for Development, and Uberis. There are also a few sporadic investments from impact investors servicing the Cambodian market from outside the country, such as Bamboo Finance, and Impact Investment Exchange (IIX).

In response to COVID-19, the government enacted additional measures to boost competitiveness and support the economy, including a long-awaited consumer protection law, additional tax breaks to the hardest hit businesses (such as those in the handicraft and tourism sectors), and direct aid to people employed in the informal sector.

Business opportunities

Most business opportunities for European and German companies lie in both the export of machinery, yarns, chemicals and equipment, as well as the import of Cambodian handicrafts.

The demand for sustainable quality cotton yarns, manufacturing machinery and equipment in Cambodia is increasing every year. Furthermore, the provision of equipment and support services for digitalisation, auditing and certification may also hold potential.

For the mid-term, issues related to profitability, logistics, trust and customer service prevent handicraft producers from selling to individual consumers internationally. However, European importers

can reach these end consumers more efficiently by targeting multiple or independent retail chains. European retailers are faced with rising demand for handcrafted goods and their success depends on product diversity – even mass merchandisers such as US-based Target have begun to feature multiple countries and cultures in their product development. This bears potential for European businesses to collaborate with Cambodian companies to create up-to-date collections of handcrafted items which accurately fit with the actual market.

develoPPP for modern ethnic design in Cambodia

In order to train aspiring Cambodian fashion designers and to keep traditional local weaving and dyeing skills alive, the Modern Ethnic Design Centre (MEDC) was established in 2017 in Phnom Penh by Bazaar Berlin together with the German Fashion Design Institut (FDI) and Raffles International College in Cambodia. Since its inception, the project has trained more than 50 local artisans and designers in developing collections by combining traditional Cambodian designs from locally sourced materials with European trends, while facilitating market access to Europe at the same time. Ensuring fair manufacturing conditions and proper certification of the products was a central objective of the project. Since 2019, a follow-up project is being implemented that has led to the establishment of the Cambodian-owned social business *handmade unlimited (hmu)*. MEDC has been integrated into hmu's inclusive business model which aims to design, develop, manufacture and internationally distribute handmade, Fair Trade certified, high quality and design products from Cambodia. Both projects are implemented within the framework of the develoPPP-programme, funded by the German Federal Ministry for Economic Cooperation and Development (Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung, BMZ). They are carried out and funded by DEG Impulse.

Exports from the EU and Germany to Cambodia

Generally speaking, EU export volumes to Cambodia are comparatively low (worth \$659 million in 2020). This also applies to Germany (\$107 million in 2020), with Cambodia ranking only number 108 as importer of German goods. However, the handicrafts sector provides several opportunities for European exports as outlined below.

Machinery for modernising the handicraft sector

Cambodian handicrafts – particularly textile spinning, weaving, crocheting, jewellery making, and vegetal lacquering – are valued for their high skill level and know-how. However, parts of the handicraft sector need to become more competitive by mechanising aspects of the production process in order to be able to sustain business. In particular, Cambodian basketry makers face strong competition from abroad. While hand-weaving is a traditional skill that will likely not be industrialised because the label *Hand Made* provides a unique value to the product, the collection of raw material and its preparation before weaving is usually more intensive and should be mechanised. For the basketry sector, mechanising the cut, cleaning and bio treatment of raw natural fibres, such as rattan, water-hyacinth, sedge or grass, would allow an increase in productivity by a factor of 15 and significantly decrease the cost of raw materials. The sustainable textile industry would benefit from mechanisation as well, to improve its competitiveness. Silk, cotton, lotus, banana and kapok require natural fibre collection and preparation machinery, yarn blending machinery, warp preparation machinery and dyeing process machinery, as well as medium-sized knitting, silk screening and embroidery machinery to offer more diversity of style and properties. Machinery would also benefit the recycled product sector, with professional washing machines increasing efficiency of the decontamination process of waste material. In this regard, European companies have the technology to compete with their Asian and North American counterparts.

Chemicals and yarns

In order to access the European market, the use of azo-free dyes is an obligatory requirement according to EU directive 2002/61/EC. European companies are well equipped to provide appropriate products such as tanning and dyeing extracts, derivatives and pigments. So far, Cambodia imports 100% of its chemical dyes used for silk and other natural fibres from former German company DyStar. In 2022, Germany is expected to export \$306,000 worth of these articles. Handicraft producers prefer importing quality certified organic yarns for handloom weaving, which are mainly produced in China; however, the minimum order quantity is often too large and is not suitable for medium social enterprises. Instead, they require orders from 30 to 300 kg of quality yarn that could be supplied by European suppliers.

New Technologies

Digital technologies offer great advantages to Cambodian handicraft producers. They have become a vital mechanism driving innovation and are an important means of reforming processes to enhance

productive capacity and competitiveness. Cambodian handicraft companies have started to adopt technology to generate new handcrafted work such as the lacquer company Stocker Studio, which uses 3D printers for creating prototypes of furniture. Textile and fashion designers use Computer-aided design (CAD) to create personalised clothing and accessory collections for their clients abroad and have also started using digital screen printers. Finally, laser cutters and engravers are in demand for the creation of jewellery and (vegan) leather items. Providing the handicraft industry with technology for better traceability would also help upgrading the value chain in the sector, optimise order communication and stock management, improve financial management, and facilitate design and marketing communication.

Importing from Cambodia to Europe

During the past 25 years, exports from Cambodia to the European Union have increased steadily. For example, exports to Germany have grown at an annual rate of 20%, from \$19.3 million in 1995 to \$1.84 billion in 2020, making Germany Cambodia's fifth largest export market, receiving 5.5% of total Cambodian exports. The country is the leading European importer of Cambodian Home Decoration and Home Textiles (HDHT) products with an 18% market share in 2020. Since 2016, European imports of HDHT products have increased to \$146 billion, of which 40% came from developing countries. Imports from developing countries grew from \$58 billion in 2016 to \$64 billion in 2019, at an average annual rate of 3.2%. For example, the Dutch HDHT retail sector realised an impressive 11% year-on-year sales increase in the first six months of 2020. The recent re-orientation towards exports in the sector due to COVID-19 may provide opportunities for European buyers.



Bamboo basket hand-weaving in Mondulkiri province

While mass production from countries like China and Vietnam dominates the low-end market, the mid- to high-end markets with greater focus on sustainability offer a niche for Cambodian products. The highest market demand in Europe is for recycled products, bags, home textiles, scarves and other textile accessories, as well as basketry, seasonal decoration and wooden items. Since the country is in the early stages of developing its own home accessory products for the international market, Western designers are often needed to adapt existing products. This way Cambodia can continue to focus on high quality, developing its own style with functional, unique, contemporary designs as well as sustainable materials.

Establishing a Sustainable Production System for Rattan Products

In order to make rattan harvesting and processing in the Mekong region more sustainable and economically competitive, the Sustainable Rattan Programme was initiated as early as 2006 by the WWF in Cambodia, Laos, and Vietnam. Throughout its consecutive phases, funding has been provided mainly by IKEA, the Swedish International Development Cooperation Agency (Sida), the EU, and the German development finance institution DEG. As an example of successful cooperation between the private and the development sector, in Cambodia the program has led to the establishment of the Rattan and Bamboo Association of Cambodia in 2009 and has contributed to forest protection, environmentally friendly rattan processing and harvesting practices, credible certification of related products and improved links to international markets. Today, the program continues to directly support the rattan communities with know-how on growing, resource management and processing techniques. Community members generate almost \$0.5 million annually in market sales from harvested rattan, bamboo and other non-timber forest products from the sustainably managed forests. For IKEA, linking their suppliers to local processors is essential in order to source sustainable products made from renewable resources.

Home Decoration

A particularly well-performing product group is basketry. European basketry imports increased from \$500 million in 2016 to \$600 million in 2020. Cambodian basketries fit well with the increased importance of sustainability, as about 80% of the basketry that Europe imports is made from natural materials which are all abundantly available in Cambodia. Out of these 80%, 17% are rattan, 12% bamboo, and 71% other natural materials such as seagrass, jute, water hyacinth or abaca. Importing sustainably produced baskets in larger quantities is thus a feasible business opportunity. Other opportunities reside for instance in training the local workforce to achieve better quality of sourced products.

European countries are witnessing new trends, such as an increase in demand for eco-friendly carpets, and an inclination towards contemporary surface rugs, which are shifting the dynamics of the European rugs and carpet market. Meanwhile, Cambodia offers a good production capacity for quality handmade rugs and mats made from eco-friendly natural fibre such as sedge or water-hyacinth that match perfectly with the European expectations.

Finally, contemporary wall decor is trendy, with an annual growth projection of 3.4% as one of the most popular product categories. Cambodian handicraft offers many wall decor items such as wall art, mirrors, picture frames, and coat hooks. Further increasingly popular items in home decoration include accent furniture, lacquerware, wooden items, ceramics, and items accented with eggshell.

Sustainable Textiles and Fashion Apparel

In 2021, the German home textiles import value was \$7 billion and about half of these textiles originated from developing countries. The best opportunities in home textile rely on the high market demand for tablecloths, cushion covers, throws, and bedspreads, which are largely produced by Cambodian artisans. This is also due to the growing market interest in eco-friendly household textiles based on organic fibres, organic cotton, and organic dyes. Traditional Cambodian cotton scarves (*kramas*) also offer great opportunities. Thus, more collaboration between Cambodian producers and German buyers is expected.

The Cambodian silk industry has the largest number of export-oriented and export-experienced companies that employ a large number of people. There is proven market demand for silk products from Cambodia, with silk scarves being the most sought-after products, providing opportunities for European fashion brands and wholesalers.



Production of water hyacinth yoga mat on traditional Khmer loom

Jewellery

According to retailers, jewellery has now replaced ceramics and glass as the best-selling product group. Cambodia is strong on recycled jewellery, with a number of export-experienced companies specialising in this highly sought-after product group. The industry is particularly dynamic and employs a reasonably large number of craftsmen. The production capacity can answer the demands of medium jewellery retailers with a series from 100 to 1,000 pieces of recycled bullet jewellery. International Foreign Investment is encouraged in order to reinforce the value chain and create more western fashion-oriented collections.

Costume jewellery in particular is a fast-growing market that is more accessible to Cambodian artisans than the market for precious and semi-precious materials. They are skilled to design costume jewellery like wedding dresses and accessories. In addition to non-precious metals and plastics, they use natural materials such as wood, shell, bamboo, leather, beads, horn, and recycled materials.

Eco-friendly Do It Yourself (DIY) Kits

A high trend for so-called DIY craft kits provides a new opportunity to sell natural and handmade yarns from Cambodia, vegetal dyed textiles or beads for jewellery. Especially during the COVID-19 pandemic, these kits became popular among sustainability-conscious consumers, enabling them to make their own clothes and accessories at home from raw materials and semi-finished products.

Sustainability for the High-End Market

A general competitive advantage of the value chain of home decoration, home textiles, jewellery and gifts in Cambodia is the fair trade and social orientation of the industry, with many companies having an NGO background and some being fair trade certified. While the market for purely indigenous designs is limited, “global style” is a growing category that represents a great opportunity of collaboration between European importers and Cambodian traditional artisans, as they can adapt traditional Cambodian designs and skills to complement the broad offerings of the expanding luxury market where larger profit margins and distinctive world styling often converge.



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