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**Agricultural Trade between
China and the Greater
Mekong Subregion Countries**

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Agricultural Trade between China and the Greater Mekong Subregion Countries

A Value Chain Analysis

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CONTENTS

<i>List of Tables</i>	vii
<i>List of Figures</i>	x
<i>List of Annexes</i>	xiii
<i>Foreword by Dr Eng Netra</i>	xv
<i>Preface</i>	xvii
<i>Acknowledgements</i>	xx
<i>Abbreviations and Acronyms</i>	xxi
<i>The Contributors</i>	xxiii
1. Agricultural Trade between China and the Greater Mekong Subregion Countries: An Overview <i>Jayant Menon</i>	1
2. Economic Structural Change in China and the Implications for Agricultural Trade in the Lancang-Mekong Region <i>Hong Song, Lingyun Gao, Qingyi Su and Chengwei Zang</i>	22
3. Agricultural Exports from Thailand to China: A Value Chain Analysis of Cassava and Durian <i>Punpreecha Bhuthong, Papatsara Rattanasimanon and Nuttaporn Udomkiattikul</i>	59
4. Agricultural Exports from Cambodia to China: A Value Chain Analysis of Cassava and Sugarcane <i>Narith Roenun and Hockheang Hiev</i>	108

5.	Agricultural Exports from Laos to China: A Value Chain Analysis of Rice and Cavendish Banana <i>Viengsavang Thipphavong, Thantavanh Manolom, Vanaxay Soukhaseum, Phouthaphone Southammavong and Somdeth Bodhisane</i>	164
6.	Agricultural Exports from Myanmar to China: A Value Chain Analysis of Maize <i>Ngu Wah Win, Zaw Oo, Aung Htun and Zaw Min Naing</i>	205
7.	Agricultural Exports from Vietnam to China: A Value Chain Analysis of Dragon Fruit and Coffee <i>Nguyen Thang, Pham Minh Thai, Vu Hoang Dat and Vu Thi Van Ngoc</i>	256
	<i>Index</i>	295

LIST OF TABLES

1.1	Growth and Structural Transformation in GMS Countries	2
1.2	Agriculture's Importance in GMS Countries	3
2.1	Contribution of Agriculture to Economic Growth, 1966–2018	26
2.2	Estimation of Surplus Rural Labour in China, 1978–2017	29
2.3	Consumption Structure and Variation in Trends in 2017	34
2.4	Import Values of Major Agricultural Products and Variation in Trend in 2017	35
2.5	Per Capita Import Growth of Some Agricultural Products, 2010–17	36
2.6	Per Capita Domestic Production Growth Rate of Some Agricultural Products, 2010–17	37
2.7	Revealed Comparative Advantage of Each Product Category	38
2.8	Total Projects and Number of Chinese Central Enterprise Projects in Lancang-Mekong Countries, 2004–15	41
2.9	Regional Distribution of China's Foreign Investment in 2017	42
2.10	Regional Distribution of China's Agricultural Outward Investments in 2017	43
2.11	Investment Trends in Primary Agricultural Products	44
2.12	China's Import-Export Trade by Region in 2017	45
2.13	Trade Value and Growth Rate of Lancang-Mekong Countries, 2009–17	46
2.14	China's Agricultural Trade with Lancang-Mekong Countries, 2015–18	47
2.15	Top Five Products with Largest Trade Value between China and Individual Lower Mekong Countries	52

3.1	Top Five Agricultural Product Exports by Value to China, 2017	61
3.2	Key Actors in the Durian and Cassava Value Chains	76
3.3	Summary of Challenges in the Durian and Cassava Value Chains	85
3.4	Summary of NTMs for Durian Export	95
3.5	Summary of NTMs for Cassava Imports	98
3.6	Summary of NTMs for Cassava Exports to China	99
4.1	Contribution of Agriculture to the National Economy	111
4.2	Top Fifteen Agricultural Exports from Cambodia to China, 2016	113
4.3	Number of Respondents for the Cassava and Sugarcane Value Chain Analyses	115
4.4	Cassava Production Costs in the Selected Provinces	125
4.5	Returns and Profit from Cassava Production for Farmers	127
4.6	Number of NTMs Affecting Different Trading Partners' Exports of the Four Products to China as of 2020	138
4.7	Number of NTMs by Code Imposed on the Selected Products as of 2020	141
5.1	Rice Production in Laos and Other GMS Countries	172
5.2	Aggregate Data on Rice Production in Laos, 2013–17	172
5.3	Costs and Benefits of Rice Value Chain at the Farm Gate	178
5.4	Costs and Benefits of the Rice Value Chain for Vanida Rice Mill	180
5.5	Costs and Benefits of Rice Value Chain at Exporter (Wholesaler) and Retailer Stage	181
5.6	Key Actors and Challenges in the Rice and Cavendish Banana Value Chains	190
6.1	Producer Survey Sampling Frame	215
6.2	Major Crop Areas in Myanmar	219
6.3	Historical Prices of Maize	221
6.4	Cultivated Areas and Production of Maize in the Districts of Shan State, 2017	222
6.5	Cost and Return Analysis for Average Farmer	231
6.6	Farmers' Decisions on Harvested Maize	236

6.7	NTMs Imposed by China on Maize (HS 1005) Imports from Myanmar	238
6.8	Discrepancies in Maize Trade Statistics between Myanmar and China	240
7.1	Contribution of Agriculture to the National Economy	260
7.2	Coffee Production in Vietnam, 2013–18	261
7.3	Vietnam’s Total Coffee Exports to China, 2015–18	263
7.4	Coffee Exported through Lang Son and Lao Cai Border Gates and Ho Chi Minh City, 2017–19	263
7.5	Exports of Dragon Fruit via Lang Son, Lao Cai and Ha Giang, 2017–19	266
7.6	Summary of Qualitative Interviews	267

LIST OF FIGURES

2.1	Changes in the Proportion of Employment in Agriculture, Industry and Services in China, 1978–2018	27
2.2	China’s Trade in Agricultural Products, 1998–2017	31
2.3	China’s FDI, 2012–17	50
2.4	China’s Outbound Direct Investment and Growth Rate, 2012–16	50
3.1	Durian Planted Area and Production in Thailand, 2004–18	62
3.2	Average Farm Gate Durian Prices in Thailand, 2004–18	63
3.3	Thailand’s Cassava Harvested Area and Production, 1997–2019(f)	65
3.4	Destinations of Thailand’s Cassava Exports, 1961–2015	67
3.5	Thailand’s Cassava Exports to China, 1998–2018	68
3.6	Composition of Thailand’s Cassava Exports to China, 2000–18	69
3.7	Conceptual Framework for Value Chain Analysis	72
3.8	Change in the Structure of the Fresh Durian Value Chain between 2008 and 2016	74
3.9	Thai Cassava Value Chain	75
3.10	The Role of the Packing House and the Relationships with Packing House Partners	79
3.11	The Route of Durian Products from Thailand to China	83
3.12	Transport Routes for Exporting Durian from Thailand to China	89
3.13	Map Showing Land Transport Routes for Exporting Durian from Thailand to China	90

4.1	Cambodia's Cassava Value Chain	119
4.2	Total Domestic Cassava Processing Capacity	123
4.3	Benefit Distribution Among Key Actors in Three Distribution Channels of the Cassava Value Chain	124
4.4	Cambodia's Sugarcane Value Chain	129
4.5	Cost in Various Stages of Cambodia's Sugarcane Value Chain	132
4.6	Income Distribution in the Sugarcane Value Chain	134
4.7	Profit Distribution Among All Actors in the Sugarcane Value Chain	135
4.8	The Number of Active NTMs by Category Imposed by China on Raw Materials and Processed Commodities	137
4.9	The Most Used NTMs by Code on China's Imports of the Four Commodities as of 2020	140
4.10	Additional NTMs Imposed by China on Selected Products, 2010–16	142
5.1	Rice Value Chain under Xuanye-Vanida Business Cooperation	176
5.2	Rice Value Chain under IDP Rice Mill	177
5.3	Porter's Value Chain Framework for Lao Cavendish Bananas	185
5.4	Cavendish Banana Value Chain Costs and Revenues in Northern Provinces	187
5.5	Factors Affecting the Business Environment of Cavendish Banana Plantations (n=12)	189
5.6	Export Procedure for Cavendish Bananas	193
6.1	Number of Notifying Countries and Number of (a) SPS and (b) TBT Notifications, 1995–2010	211
6.2	Harvested Areas of Major Crops as Shares of Total Cultivated Area, 2017	220
6.3	Population Distribution in Shan State	223
6.4	Maize Value Chain Map in Shan State	225
6.5	Sources of Maize Seed Planted by Farmers in Shan State	228
6.6	Cost of Production by Farm Size	229

6.7	Productivity among Farmers	230
6.8	Comparison of Myanmar's FOB Prices of Maize to Different Markets	241
7.1	Top Destinations for Vietnam's Coffee Exports	262
7.2	Export Value of Dragon Fruit, 2003–18	265
7.3	Distribution of Dragon Fruit Exports by Market Destination, 2014–18	266
7.4	Coffee Value Chain in Vietnam	270
7.5	Dragon Fruit Value Chain in Vietnam	275

LIST OF ANNEXES

4.1	List of Districts and Villages Selected for Field Data Collection	151
4.2	Global Cassava Value Chain	152
4.3	Governance Structure in Different Linkages Throughout the Sugarcane Value Chain	153
4.4	Sugarcane Cultivation Areas and Production in Cambodia, 1961–2019	154
4.5	Sugarcane Trade Value of Mekong-Lancang Countries, 2001–19	155
4.6	Sugarcane Export Value from GMS Countries to China, 2001–19	156
4.7	Computation of Value-Added Costs for Sugarcane from Production to the Border	157
4.8	Constraints in the Cassava Value Chain	158
4.9	Weaknesses and Strengths in Sugarcane Value Chain Upgrading Strategies	159
5.1	AQSIQ Moisture Standards for Imported Rice	199
5.2	China’s Sanitary and Phytosanitary Measures	200
Appendix 6.1	Various Documentation and Procedural Requirements for Trade with China	247
Appendix 6.2	More Statistics on Trade between China and Myanmar	249

FOREWORD

The Greater Mekong Subregion (GMS), which encompasses five Southeast Asian countries—Cambodia, Laos, Myanmar, Thailand and Vietnam (CLMV-T)—and China, is one of the most dynamic subregions in Asia. Apart from progressive market-oriented reforms, countries in the GMS have pursued broader regional integration through various multilayer cooperation frameworks. These include ASEAN, ASEAN-China Free Trade Agreement, China’s bilateral economic partnerships, the Regional Comprehensive Economic Partnership agreement and the Lancang-Mekong River Dialogue and Cooperation. While manufacturing trade and global value chain activities significantly benefit from these cooperation frameworks, agricultural trade especially between the CLMV-T and China is hindered by high barriers to trade in the form of tariff and non-tariff measures. Under these circumstances, *what are the key constraints and challenges facing agricultural exports from the CLMV-T? What do China’s rapid structural change and development mean for agricultural trade within the subregion? How can the CLMV-T further integrate their agriculture and rural economies to tap into the colossal Chinese market?* Those are the main questions explored in this volume.

This volume consists of six country papers covering each of the GMS countries. The papers were prepared collaboratively by local experts from leading research institutions within the subregion. The first chapter examines the rapid structural transformation and evolving economic policy taking place in China and their implications for agricultural trade within the subregion. Chapters 2–6 cover the CLMV-T country case studies, which examine a range of traditional and non-traditional issues relating to agricultural exports. The studies adopt broadly consistent value chain analysis frameworks to analyse not only key constraints and challenges in agricultural value chains from domestic to export market but also

identify the key constraints and relationships between actors along the entire value chains.

Overall, the rapidly growing demand for food consumption represents huge opportunities for agricultural exports for the CLMV-T. However, those countries continue to struggle to address some of the domestic constraints related to absorptive capacity, requisite skills and market diversification for agricultural production and export. They also face difficulties in resolving non-tariff measures (NTMs) at the export market, especially with regard to more complex trade procedures such as obtaining SPS certificates; delays at the border; and lack of publicly available information on relevant NTMs.

I am delighted to present this volume, which offers an insightful overview of some of the key developments in agricultural trade in the GMS. I am sure this work will prove to be an invaluable reference for policymakers, academics and practitioners who strive to work on promoting agricultural development and trade for inclusive economic growth and poverty reduction.

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PREFACE

The economic prospects of Southeast Asia are increasingly intertwined with that of China and the interdependency is growing with time. This is particularly true for the riparian states of the Mekong region—Cambodia, Laos, Myanmar, Vietnam and Thailand (CLMV-T). Although market-oriented reforms over the past few decades in the CLMV countries, in particular, have driven structural transformation that has involved the share of agriculture in GDP falling in favour of industry and services, it remains an important sector for several reasons.

First, the shares of agriculture in GDP do not reflect their importance as a source of employment or potential for addressing poverty, inequality or inclusion. Even in 2018, the rural sector continued to employ more than half of the labour force in Laos and Myanmar, and a third in Cambodia and Vietnam. There is also growing evidence that shows that growth driven by commercial agriculture in developing countries can have a much greater impact on poverty reduction than that coming from other sectors. Overcoming barriers that stand in the way of increased agricultural exports from the Mekong region to important and growing markets such as China can play a critical role in achieving economic and social objectives.

These developmental opportunities and possibilities provided the motivation for the study reported on in this book. The approach taken involved detailed case studies of key agricultural export commodities in the CLMV-T countries destined primarily for the Chinese market. It is only through detailed case studies that specific impediments along the value chain can be identified, as well as the non-tariff barriers (NTBs) that interfere with cross-border trade. Often these impediments and NTBs are not unique to the particular cases being studied but can manifest in other products and areas. Addressing the impediments along the value chains

or the NTBs at the border can often have benefits that extend beyond the particular product or sector. These reforms can therefore produce spillover effects that can result in much larger economy-wide benefits.

There are several key takeaways for policy arising from the study. The first is that the agricultural export sector must continue to play a critical role in the development process of the Mekong region, while these countries look to industrialize through greater engagement in global value chains in manufacturing, driven by foreign direct investment. The second relates to the need for diversification to support more balanced and sustainable growth, which reduces vulnerability to external shocks. The study highlights the fact that such risk-mitigating diversification can be pursued through various avenues.

While a lot of attention has been placed on intersectoral diversification, mostly involving the movement out of agriculture into manufacturing, intrasectoral diversification can be equally important in achieving the same ends. Here again, the focus has been on diversification within manufacturing, although there is an important albeit somewhat neglected role for diversification within agriculture that can reduce vulnerability to external shocks. Pursuing greater diversification within agriculture could address some of the concerns associated with export instability, common amongst commodity-dependent developing countries. The exposure to terms-of-trade shocks can be reduced by processing activities along the agricultural value chain because the prices of such processed commodities tend to be less volatile than the primary commodities themselves. The prices of processed commodities tend not to go through the same swings associated with the commodity cycle. Therefore, pursuing diversification within both agriculture and manufacturing can contribute to an overall risk-reduction strategy.

Apart from product concentration—whether it is in agriculture or manufacturing—there is also a need to reduce the concentration of export markets. It is undeniable that the huge potential presented by the Chinese market has been a major driving force in the development of export-oriented agricultural value chains. While China will continue to be an important market for agricultural exports from the region, there may be a need to diversify sources of demand so that the effects of country-specific or regional shocks can be mitigated. This is particularly important for countries that currently rely almost exclusively on the Chinese market for their export sales. Reducing such high levels of dependency on a single market could

also decrease the risk that highly unequal bargaining positions could be exploited for unequal gains that can end up deterring trade.

If policies can be instituted to address the various impediments identified in this study that operate along the agricultural value chain as well as the myriad of tariff and non-tariff barriers that interfere with cross-border trade, then the social and economic benefits to the CLMV-T countries and China can be substantially increased.

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Our sincere thanks go to all contributors for their hard work. Many hours of writing, reviewing and editing have gone into producing this edited volume. Technical advisors, especially Dr Ray Trewin, and several anonymous external reviewers were also instrumental in guiding the research project and improving its analytical quality. We would also like to thank Anna Cassandra Melendez for valuable research assistance and Susan Watkins for her excellent editing work.

We are grateful to the various household heads, owners/managers of firms, traders, exporters, policymakers and other actors in the value chain who spent their valuable time answering survey questions, and participating in focus group discussions and key informant interviews. This book would not have been possible without their participation.

Jayant Menon and Vathana Roth

ABBREVIATIONS AND ACRONYMS

ADB	Asian Development Bank
AEC	ASEAN Economic Community
AQSIQ	Administration of Quality Supervision, Inspection and Quarantine
ASEAN	Association of Southeast Asian Nations
CAF	Centre for Analysis and Forecasting
CASS	Chinese Academy of Social Sciences
CDRI	Cambodia Development Resource Institute
CESD	Centre for Economic and Social Development
CLMV-T	Cambodia, Lao, Myanmar, Vietnam and Thailand
CTIS	Cambodia Trade Integration Strategy
ERIIT	Economic Research Institute for Industry and Trade
ELC	economic land concession
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FDI	foreign direct investment
FOB	freight on board
FTA	free trade agreement
GACC	General Administration of Customs of China
GAP	good agricultural practice
GATT	General Agreement on Tariffs and Trade
GDP	gross domestic product
GMP	good manufacturing practice
GMS	Greater Mekong Subregion
IFAD	International Fund for Agricultural Development
IMF	International Monetary Fund

KHR	Khmer riel
LAK	Lao kip
LMC	Lancang-Mekong Cooperation
MFIs	Microfinance Institutions
MMK	Myanmar kyat
MoU	memorandum of understanding
NTBs	non-tariff barriers
NTMs	non-tariff measures
OECD	Organization for Economic Co-operation and Development
RCA	revealed comparative advantage
R&D	research and development
RMB/CNY	Renmimbi/Chinese yuan
SMEs	small and medium enterprises
SPS	sanitary and phytosanitary
TBT	technical barriers to trade
TDRI	Thailand Development Research Institute
THB	Thai baht
UNIDO	United Nations Industrial Development Organization
UNCTAD	United Nations Conference on Trade and Development
UNIDROIT	UN-International Institute for the Unification of Private Law
VASS	Vietnam Academy of Social Sciences
VAT	value added tax
VCA	value chain analysis
VND	Vietnamese dong
WDI	World Development Indicators
WTO	World Trade Organization

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