Reproduced from Agricultural Trade between China and the Greater Mekong Subregion Countries: A Value Chain Analysis, edited by Jayant Menon and Vathana Roth (Singapore: ISEAS – Yusof Ishak Institute, 2022). This version was obtained electronically direct from the publisher on condition that copyright is not infringed. No part of this publication may be reproduced without the prior permission of ISEAS Publishing.

Individual chapters are available at http://bookshop.iseas.edu.sg.

## **INDEX**

| A Agricultural Cooperatives, 93 Agricultural Development Strategy, 164 air freight, 84, 88–89 | AyeyawadyChao Phraya-Mekong<br>Economic Cooperation Strategy,<br>19 |
|---|---|
| APEC Business Advisory Council,   | В   |
| 208   | Bank for Agriculture, 93  |
| AQSIQ (Administration of Quality  | Beans, Pulses and Sesame Seeds                                      |
| Supervision, Inspection and   | Merchants Association, 234  |
| Quarantine), 96, 100, 174–75,   | Belt and Road Initiative, 7, 18, 30, 42,                            |
| 191–92, 194–97, 199, 201  | 44, 48–49, 57   |
| Armo, 228   | border trade, 209, 213, 216, 224, 226,                              |
| ASEAN (Association of Southeast   | 230, 232–33, 237, 239, 242–44, 257                                  |
| Asian Nations), 18-19, 30, 40, 48,  | see also cross-border trade   |
| 51, 60, 109–10, 205, 244  | brick-and-mortar stores, 82   |
| ASEAN-China Free Trade Area, 59,  |   |
| 110   | C   |
| ASEAN Economic Community  | Cambodia  |
| (AEC), 4  | agricultural economy, 111   |
| ASEAN Master Plan on Connectivity,  | cassava, and, 114, 118–28, 137–48,                                  |
| 19  | 158   |
| ASEAN Trade in Goods Agreement,   | exports, 113  |
| 174   | GDP growth, 2   |
| Australia, 42, 148, 265   | population, 110   |
| Automated System for Customs Data,<br>109   | sugarcane, and, 115, 128–48,<br>153–57, 159                         |
| AVE (ad-valorem equivalent), 211–12   | Cambodia Development Resource                                       |
| Avian influenza, 224  | Institute (CDRI), 9   |
| Awba (Syngenta), seed company, 227  | Cambodia Industrial Development                                     |
| Ayethaya Industrial Zone, 215, 232  | Policy, 109   |
| 11) Citaya Hadanai 2010, 213, 232   | 1 oney, 107   |

| Cambadia Tuada Internation Churcher     | China Cautificata of Oniain 201                |
|---|--|
| Cambodia Trade Integration Strategy,    | China Certificate of Origin, 284               |
| 109, 121–22, 146                        | China Certification and Inspection             |
| cassava, 9–10, 13–14, 60, 64–70, 73–78, | Company, 192                                   |
| 84, 85, 92–94, 118–28, 137–48, 158      | China Communist Party, 24                      |
| global value chain, 152                 | China Inspection and Quarantine, 194           |
| Catalogue of Fresh Fruit Types and      | China Inspection Co., Ltd, 88                  |
| Export Countries/Regions, 51            | China International Import Expo, 49            |
| Cavendish banana value chain,<br>192–95 | China-Japan-South Korea Free Trade<br>Zone, 48 |
| Centre for Analysis and Forecasting     | China Oil and Foodstuffs Corporation           |
| of the Vietnam Academy of               | (COFCO), 175-77, 179-80, 190                   |
| Social Sciences (CAF-VASS), 10          | "Chinese enterprises", 278                     |
| Centre for Economic and Social          | Chinese entrepreneurs, 87                      |
| Development (CESD), 9                   | "Chinese impact, the", 182                     |
| CGCOC Group, 7                          | Chinese State Quarantine Department            |
| China                                   | of Exports and Imports, 285                    |
| agricultural sector, 25–39              | CITIC Construction, 7                          |
| border with Vietnam, 290                | climate change, 85–86, 101, 213                |
| documentation requirements for          | CLMV-T, 4–8, 14–15, 17–19                      |
| trade, 247–48                           | see also GMS                                   |
| economic growth, 31-34                  | coffee   |
| Five-Year Plan, 7, 32, 34, 44           | value chain, and, 269-74                       |
| food security policy, 23                | Vietnam, and, 257-64, 269-74, 284,             |
| free trade agreement, 30, 51            | 287  |
| GDP growth, 2                           | "Collaborative Farming", 92                    |
| labour force, 27–29                     | Commercialization of Rice and Vegetables       |
| Lancang-Mekong countries, trade         | Value Chains in Lao PDR: Status                |
| with, 40–48                             | and Prospects, 170                             |
| middle class, 257, 289                  | Committee on World Food Security,              |
| non-tariff measures, imposed by,        | 17   |
| 95–100, 135–36                          | Commodities Exchange Centre                    |
| outward foreign direct investment,      | (CEC), 233–34                                  |
| 40–44                                   | Common Agricultural Policy, 66                 |
| population, 6, 22–23, 34                | Confederation of Thai Durian                   |
| trade partners, 4, 10, 30, 55, 205      | Orchardists, 86, 102                           |
| trade statistics, discrepancies in,     | Cong Bang cooperative, see Ea Kiet             |
| 239–42, 249–51                          | Agricultural and Cooperative                   |
| China-ASEAN cooperation                 | Agricultural Cooperative                       |
| framework, 7                            | contract farming, 11, 16–17, 19, 109,          |
| China-ASEAN Free Trade Agreement        | 166–67, 175–76, 190, 195, 198, 207,            |
| (FTA), 108                              | 237, 289                                       |

| COVID-19 pandemic, 5–6                                       | Department of Land Use Statistics, 216                           |
|--|--|
| CP (Chaoroen Pokphand), 218, 223, 227, 235                   | Department of Quality and Measurement Standards, 282             |
| CP Group of Thailand, 234<br>CP Livestock, 232, 235          | Department of Standards and Quality, 282                         |
| cross-border trade, 14, 18, 57, 114, 117,                    | Department of Trade, 215   |
| 120-21, 148-49, 206, 208-9, 213,                             | Department of Trade and Production                               |
| 216, 241–45, 251, 258, 265, 274,                             | Promotion, 180   |
| 279–80, 284, 288–89  | Diamond Star, 228  |
| see also border trade  | disease epidemic, 14, 85, 93, 98,                                |
| Cross-Border Transport Agreement<br>(CBTA), 19, 91, 104, 197 | 101–2, 105, 150, 158, 226, 247, 277, 287                         |
| Culinary Commodity Association, 234                          | drying yard, 80–81<br>durian                                     |
| D  | non-tariff measures on, 95-97                                    |
| Dak Man Vietnam Co. Ltd, 272                                 | Thailand, and, 61-64, 73-92                                      |
| De Heus, 235   | value chain, and, 73–92  |
| deforestation, 166   | Durian Exporter Registration, 95                                 |
| Dehus, 218   |  |
| Department of Agricultural and Rural                         | E  |
| Development, 267   | Ea Kiet Agricultural and Cooperative                             |
| Department of Agricultural Extension                         | Agricultural Cooperative, 272                                    |
| (DOAE), 86   | East-West Economic Corridor, 105                                 |
| Department of Agricultural                                   | e-commerce, 73   |
| Processing, 290  | economic land concessions (ELCs),                                |
| Department of Agricultural Research,                         | 109, 128, 130–32   |
| 227  | see also land concession   |
| Department of Agricultural Statistics,                       | Economic Research Institute for                                  |
| 220  | Industry and Trade (ERIIT), 9,                                   |
| Department of Agriculture, 81, 96, 99,                       | 183  |
| 104, 214–15  | economic sanction, 9, 205  |
| Department of Consumer Affairs, 215                          | Enterprise Law, 278  |
| Department of Economic Cooperation                           | environmental issues, 94   |
| and Rural Development, 272                                   | epidemic, see disease epidemic                                   |
| Department of Foreign Trade (DFT),<br>84, 98                 | European Union, 60, 66, 205, 210, 212 export tax, 265, 290       |
| Department of Highways, 94                                   | export tax, 203, 290<br>exporters, 8–10, 15, 54, 60, 64, 76, 78, |
| Department of Import and Export,                             | 80–82, 84, 88, 91, 94–97, 99–100,                                |
| 174  | 103, 111, 115, 117–18, 128, 136,                                 |
| Department of Industry and                                   | 138, 144–46, 148, 150, 167–69, 172,                              |
| Handicraft, 191  | 174–75, 181, 188, 190, 192, 194–95,                              |
| ,  | , , , , ,  |

| 197, 200–1, 208, 210, 212, 216, 234, 237, 245–46, 258, 261, 264–65, 267, 269, 272, 276, 278–79, 285–88   | Fruit and Vegetable Growers<br>Association, 234  |
|--|--|
| F Facebook, 226 Fairtrade, 272, 290 farm debt, 85, 93, 101 farm gate price, 61, 63, 93, 178, 180, 213 farm law, 218 farm machinery, 229–30, 243 farm service provider, 128, 130–31, 135, 153 farmers, 4, 11–13, 22, 27–29, 61, 64, 66, 71, 76–77, 80–81, 92–94, 101–2, 105, 109, 115, 117–18, 120–22, 126–28, 147, 149, 158, 166–68, 170–73, 175, 178–79, 190, 194–96, 198, 207, 209, 213–18, 222, 224, 226–37, 241–45, 251, 258, 267, 269, 271–74, 276–81, 287–89 fertilizer, 115, 118, 125, 131, 173, 175, 178, 182–84, 186, 226, 228–30, 233, 269, 271, 273–74, 276, 279 filière approach, 216 focus group discussions (FGDs), 117, 120, 122, 126, 133, 214, 287 food safety, 19, 138, 144, 168, 175, 188, 191–92, 194, 200, 212, 280–81, 285, 287–89, 291–92 Food Safety Cooperation Forum, 19 Food Safety Law, 192 formal credit, 273 4C Code of Conduct, 272, 290 free market economy, 25 free trade zone, 19, 56 freight, types of, 88–89 Fresh Studio, 235 Fruit and Vegetable Exporter Registration, 95 | GAP (good agricultural practices), 95–97, 101–2, 104–5, 174 General Administration of Customs China (GACC), 96–97, 100, 174, 179, 191, 196–97, 201 General Administration of Quality Supervision, Inspection and Quarantine of China, 51 General Agreement on Tariffs and Trade, 30 General Department of Customs of China, 285 generalized system of preference, 108 GlobalGAP, 279, 288, 291 GMP (good manufacturing practices), 95–97, 101, 104–5, 174, 191 GMS Cross-Border Transport Agreement (CBTA), 104 GMS (Greater Mekong Subregion), 1–8, 13, 18–19, 59, 91, 103, 197, 205 population, 1, 3 see also CLMV-T GMS Programme, 4, 19 GMS Regional Investment Framework, 18 Golden Tiger, seed company, 227 growth stimulant, 276, 287  H herbicide, 118, 183, 186, 194 Hoang Anh Gia Lai (HAGL) Group, 182, 183–84 Hong Kong, 42, 88, 138, 224, 266 human capital, 16 hypermarket, 82 |

| I<br>IFAD, 17<br>importers, 14, 66, 76, 78, 80–82, 88,<br>98–100, 112, 128, 130, 146, 148,<br>179, 184, 190, 192, 194, 196, 210,<br>213, 257, 261, 284–85  | see also economic land concessions (ELCs) land freight, 88–91, 93–94 Lao Bureau of Statistics, 170 Laos cash crops in, 165–66  |
|--|--|
| Indo-China Development Partners (IDP) rice mill, 170, 174, 175, 177–80, 190, 195 Indonesia, 42, 64, 66, 234–35, 244 informal credit, 273 Interdisciplinary Committee on Technical Barriers to Trade in Vietnam, 282 International Trade Centre, 170 ISO 9001 standard, 171, 201, 235 | Cavendish banana, and, 165, 167, 169–70, 182–95 GDP growth, 2 minimum wage in, 12, 183 rice, and, 169–81, 191–92 Legal Guide on Contract Farming, 17 Li Keqiang, 7 Likert scale, 188 London stock exchange, 274 LS Company, 184, 192   |
| J<br>Japfa Comfeed Indonesia, 235<br>Japfa Group, 218, 232<br>JD.com, 84<br>Jiang Nan Fresh Fruit and Vegetable<br>Wholesale Market, 82<br>Jiangong Agriculture, 182<br>Jingdong online store, 201   | M M4P (market for the poor), 258 Making Value Chains Work Better for the Poor: A Toolbook for Practitioners of Value Chain Analysis, 216 Malaysia, 9, 42, 88, 206, 224 Mangkone Trading, 184, 187–88, 192 market competition, 88   |
| K<br>key informant interviews (KIIs), 117,<br>126, 132–33  | May Kha, 232, 234–35<br>microfinance institutions (MFIs), 118,<br>120<br>migrant workers, 85, 87<br>Mingaladon Industrial Zone, 235  |
| L labour shortage, 87 Lamy, Pascal, 210 Lancang-Mekong Cooperation, 4 Lancang-Mekong countries, 23–24 China's trade in, 40–48 LancangMekong River Dialogue and Cooperation, 7 land concession, 11, 13, 109, 183, 186, 188, 194–95, 198, 220, 251                                     | minimum wage, 12, 183, 229 Ministry of Agricultural and Rural Development, 267, 281, 284, 290 Ministry of Agriculture, 37, 43, 191 Ministry of Agriculture and Cooperatives (MOAC), 96, 100 Ministry of Agriculture and Forestry, 170, 193 Ministry of Agriculture, Forestry and Fisheries (MAFF), 114 |

| Ministry of Agriculture, Livestock and Irrigation, 214, 220, 245 Ministry of Commerce, 45, 78, 84, 98, 100, 133, 145, 191 Ministry of Health, 192 Ministry of Industry and Commerce, 170, 180, 267, 284 Ministry of Industry and Trade (MOIT), 282 Ministry of Planning and Investment, 170 Ministry of Science and Technology (MOST), 282 most favoured nation, 108 MOU (memorandum of understanding), 84 | National Health and Quality Quarantine Agency, 285 National Institute of Statistics, 110 National Technical Code, 286 New Economic Mechanism, 164 Northeastern Tapioca Trade Association, 71 North-South Economic Corridor, 105 NTMs (non-tariff measures), 5, 6, 8, 14–15, 18–19, 60, 70, 110, 112, 117, 135–36, 138–49, 166–69, 190–91, 194, 197, 206–12, 214, 216–17, 236–38, 241, 246, 258, 281, 283–84 agricultural trade, and, 210–12 cassava trade, on, 97–100 definition, 210 |
|--|---|
| Mya Nadi, maize dryer, 231, 234  | durian exports, on, 95–97   |
| Myanmar crop areas in, 219–20  |   |
| exports, 206 GDP growth, 2 maize, and, 206–9, 216–46 minimum wage, 229 natural gas, and, 206–7 population, 223 trade statistics, discrepancies in, 239–42, 249–51  | O ODM (original design manufacturer), 78 OECD, 8 OECD-FAO Guidance for Responsible Agricultural Supply Chains, 17 OEM (original equipment manufacturer), 78   |
| Myanmar Investment Commission,<br>215–16   | Office of Agricultural Economics, 71 Office of Agricultural Research and  |
| Myanmar Pulses Beans and Sesame<br>Seeds Merchants Association, 215<br>Myanmar Sustainable Development<br>Plan, 245<br>Myaung Taka Industrial Zone, 235  | Development, 97 Office of the Prime Minister, 86 offline distribution channels, 84 online platforms, 84 Opium Replacement Programme, 165  |
| N  | Orchard Association, 234 Overseas Merchandise Inspection Co. Ltd, 234   |
| National Bureau of Agricultural Commodity and Food Standards, 71   | P   |
| National Bureau of Statistics of<br>China, 24  | packing houses, 78–79, 87, 104–5<br>Pagoda, greengrocer chain, 84   |

| Pakistan, 30, 42, 283                   | R                                   |
|---|-------------------------------------|
| Partnership Training Institute          | RCA (revealed comparative           |
| Network, 19                             | advantage), 6–7, 38, 160            |
| pellet factories, 81                    | Regional Comprehensive Economic     |
| pesticide, 115, 125, 183, 186, 194,     | Partnership, 7, 48, 56, 59          |
| 228, 234, 247, 269, 271, 274, 276,      | Regulation on the Organization      |
| 278–79, 287                             | and Operation of the Network        |
| Phnom Penh Sugar Co. Ltd, 130-31,       | of Notification and Enquiry         |
| 133                                     | Agencies, 282                       |
| Plant Quarantine Act, 95                | Report on Development of China's    |
| plantation workers, 183, 186            | Outward Investment 2018, 24         |
| Porter, Michael E., 170                 | rice value chain, 172–81, 191–92    |
| Porter's value chain, 71, 115, 170,     | road-rail transport, 84             |
| 184–86                                  | road-water transport, 84            |
| Potatoes Growers Association, 234       | Rui Feng, 130–31                    |
| poverty, 2–3, 5, 12, 165, 188, 206, 245 | Rural Economic Research Centre,     |
| price volatility, 212–14, 218, 287      | 36–37                               |
| Principles for Responsible              | Russia, 42–44, 138, 262             |
| Agricultural Investment, 17             |                                     |
| Principles for Responsible              | S                                   |
| Investments in Agriculture              | sea freight, 88–89, 272             |
| and Food Systems (CFS-RAI               | seed distributors, 227–28           |
| Principles), 17                         | seed research stations, 173         |
| processors, 73, 76–78, 80, 84, 92–95,   | Siem Reap Action Plan, 19           |
| 103, 115, 117, 122, 133, 145–46,        | Singapore, 30, 42, 224, 264, 266    |
| 158, 168, 175, 179, 190, 215, 224,      | Sino-US economic trade, see US-     |
| 232–35, 243, 244, 246, 251, 258         | China trade                         |
| producer associations, 16               | small- and medium-sized enterprises |
| Project for Agricultural Development    | (SMEs), 147–49                      |
| and Economic Empowerment,               | smart farm project, 102             |
| 111                                     | specialty store, 82                 |
| protectionism, 32, 47                   | spot market, 8                      |
| protectionist policy, 44                | SPS Information Management System   |
| Provincial Committee on the Price of    | database, 210                       |
| Goods and Service, 98                   | SPS (sanitary and phytosanitary),   |
| public-private partnership, 18          | 14–15, 17, 60, 70, 95–98, 110, 136, |
| purchasing power, 59, 276               | 138–39, 145, 148, 180, 191–92, 195, |
|   | 200, 208–12, 237–39, 258, 268,      |
| Q                                       | 281–85, 287–88, 290                 |
| Q Mark, 96                              | Standardization Administration of   |
| QR code, 103                            | China, 191                          |

| starch factory, 81  | T-mall, 84  |
|---|---|
| State Administration for Industry and   | TOWS analysis, 171  |
| Commerce, 194   | trade barrier, 30, 51, 110, 167   |
| State Food and Drug Administration,<br>194  | see also technical barriers to trade (TBT)  |
| Strategy for Promoting Safe and Environment-Friendly Agrobased Value Chains in the GMS, 19 street hawker, 82 street vendor, 82 sugarcane, and Cambodia, 115, 128–48, 153–57, 159 Sunjin, investment firm, 235 supermarket, 82 Sustainable and Affordable Poultry for All, 235   | Trade Facilitation Agreement, 56 trade preferential status, 108 traders, 76, 80–84, 111–12, 114–15, 120–21, 126, 190, 208–9, 213–18, 224, 226–27, 231–35, 237, 242–44, 251, 258, 267, 269, 271–72, 274, 276–80, 287–88, 291 traditional retailers, 82–84 transporters, 76–78, 80, 115, 128, 153, 267 TVC (total variable cost), 230 Twelve-Point Action Plan for Trade Facilitation and Investment, 109 |
| Taunggyi Chamber of Commerce, 215 Taunggyi Industry Zone, 236 Taunggyi University, 216 technical barriers to trade (TBT), 14, 17, 70, 110, 136, 138–39, 145, 148, 191, 208–12, 239, 258, 268, 281–88 see also trade barrier Tet Chaung, poultry farm, 235 Thai Durian Institute, 86, 102 Thailand, 42 cassava, and, 64–70, 73–78, 84–85, 92–94 downstream, 76, 81–82, 84–85, 87, 94, 105 durian, and, 61–64, 73–92 exports, 9 GDP growth, 2 midstream, 76, 78, 82, 85, 87, 93 | U UN Comtrade database, 24, 208, 214, 237, 249, 251 UNCTAD, 17, 136, 139, 283–84 UNIDROIT, 17 unilateralism, 32, 47 Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI), 233–34 United Nations Industrial Development Organization (UNIDO), 71 United States, 32, 39–40, 42, 44, 47–48 60, 103, 205, 262, 264, 266, 283, 287 United States Department of Agriculture (USDA), 224  |
| upstream, 76–78, 82, 85–86, 92<br>Thailand Development Research   | US-China trade, 5, 32, 37, 39, 44, 47, 49   |
| Institute (TDRI), 9   | UTZ Certified, 272, 290   |

| V                                      | coffee, and, 257-64, 269-74, 284,      |
|--|--|
| value chain                            | 287                                    |
| cassava, and, 73-78, 84-85, 92-94,     | dragon fruit, and, 257-60, 264-67,     |
| 118–28, 158                            | 274-80, 284-87, 291                    |
| Cavendish banana, 192–95               | exports, 256–57                        |
| coffee, 269–74                         | GDP growth, 2, 259, 260                |
| definition, 268                        | Vietnam-China border, 290-91           |
| downstream, 76, 81-82, 84-85, 87,      | Vietnam Coffee and Cocoa               |
| 94, 105, 133                           | Association, 267                       |
| dragon fruit, 274–80                   | Vietnam General Statistical Office,    |
| durian, and, 73–92                     | 267                                    |
| GMS countries, in, 7–13                |  |
| maize, and, 216-36                     | W                                      |
| midstream, 76, 78, 82, 85, 87, 93,     | wholesalers, 73, 76, 82, 84, 168, 173, |
| 218                                    | 181, 196–97, 234, 274, 276, 278        |
| rice, 172–81, 191–92                   | World Bank, 2, 17–18, 169–70           |
| upstream, 76–78, 82, 85–86, 92         | World Education, 169                   |
| ValueLinks, 258                        | World Integrated Trade Solution        |
| Vanida rice mill, 170, 174–76, 178–80, | database, 24                           |
| 190                                    | WTO (World Trade Organization),        |
| VAT (Value Added Tax), 265, 280, 284,  | 4, 8, 15, 17, 26–27, 30, 38, 56,       |
| 290–91                                 | 109–10, 174, 209–10, 273, 282          |
| VFV (vacant, fallow and virgin) land,  |  |
| 218, 220                               | X                                      |
| Viber, 226                             | Xi Jinping, 48                         |
| VietGAP (Vietnamese good               | Xuanye Company, 170, 174–76,           |
| agricultural practices), 279, 288,     | 179–80, 190, 192, 195, 201             |
| 291                                    |  |
| Vietnam                                | Y                                      |
| border with China, 290                 | Yellow Field International, 130–31     |