



Changing food consumption and imports in Malaysia

Opportunities for Australian agricultural exports

Suthida Warr, Gil Rodriguez and Jammie Penm

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Foreword

Rapid expansion of the Malaysian economy over the past two decades has resulted in changing food consumption patterns and a growth in demand for agricultural products. Domestic production, however, cannot keep pace with rising demand. Demand for food, especially for wheat-based products, livestock, dairy products, sugar and vegetables, is expected to continue to increase. Imports are essential to meeting Malaysia's food requirements.

Malaysia is a net importer of food products, with total agricultural imports valued at around US\$6.6 billion in 2006. Australia is the leading agricultural exporter to Malaysia. The key agricultural imports from Australia are wheat, sugar and dairy products. Other agricultural imports from Australia include wool, live cattle, vegetables, sheep meat, beef and fruits.

The food processing industry is important in Malaysia and growing significantly, with many intermediate inputs being imported. For example, wheat and sugar are used for further processing for bakery products and confectionaries, and meat in the production and export of halal products.

Because of its geographic proximity, Australia can play an important role in meeting Malaysia's food demand. This report analyses agricultural consumption, production and imports in Malaysia. The current market access arrangements and the implications for Australia's agricultural exports to Malaysia are also discussed.



Phillip Glyde
Executive Director
July 2008

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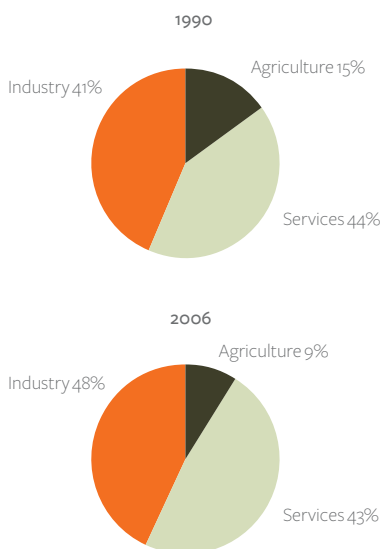
Summary

- With rapid income and population growth, food consumption in Malaysia has shifted away from starchy staples and become more varied with the inclusion of greater quantities of wheat-based products, meat, dairy products, seafood, fruit and vegetables.
- Because of Malaysia's limited domestic agricultural production and a growing demand for many products (such as wheat-based products, livestock and dairy products, sugar and vegetables), imports have been a major source of Malaysia's food supply. This provides market opportunities for Australia's agricultural export industries.
- Australia is the leading agricultural exporter to Malaysia. Malaysia's key imports from Australia are wheat (valued at US\$198 million in 2006), sugar (US\$178 million) and dairy products (US\$112 million). Others include wool, live cattle, vegetables, sheep meat, beef and fruits.
- The food processing industry in Malaysia is growing, with many intermediate inputs being imported. For example, wheat and sugar are used for further processing for bakery products and confectionaries and meat is used in the production and export of halal products, providing export opportunities for Australia.
- The Malaysian government plans to develop its food processing industry with a particular emphasis on halal food products, which have the potential to expand into international markets. This also provides an opportunity for Australian exporters to cooperate with the Malaysian food processing industry and participate in its plan for global expansion.
- Despite some very high bound tariffs, applied tariffs on agricultural products in Malaysia are mostly low or zero. However, non-tariff protocols constrain Australian exports to Malaysia, including the requirement to obtain halal meat approval and the allocation of import licences for some agricultural commodities such as sugar and milk.
- In Malaysia, despite some recent reforms, a range of products continue to be subjected to price controls. These include sugar and wheat products. Unless significant pressures on domestic prices emerge, imports will not be allowed to increase. This also constrains Australia's exports of these commodities to Malaysia.
- Freer domestic trade practices and elimination of price controls might improve Australia's prospects in exporting more commodities to Malaysia.

1 Introduction

The Malaysian economy has experienced strong economic growth over the past few decades, with economic growth averaging around 6 per cent a year since 2000. Income per person reached around US\$5800 in 2006, ranking the third highest in South East Asia (beneath Brunei and Singapore). With rising incomes, food consumption has shifted away from starchy staples and moved toward wheat and livestock products, seafood, fruit and vegetables (Mitchell et al. 1997; Lee and Kennedy 2006).

a Shares of gross domestic product in Malaysia



In Malaysia, industrialisation has led to strong competition for domestic resources such as land and labour. This has resulted in a decline in the share of agriculture in gross domestic product, from around 15 per cent in 1990 to 9 per cent in 2006 (figure a).

Production in the agricultural sector is dominated by palm oil, rubber and forestry products (Wong 2007). Other major agricultural production includes rice, poultry, fruits and vegetables. Because of relatively limited production of, and rising demand for, many agricultural products, such as wheat, beef, sheep meat and dairy products, imports have been a major source of Malaysia's food supply. In 2005, for example, imports of beef and dairy products accounted for around 77 and 98 per cent respectively of domestic consumption.

Despite the significant reliance on imports for food supplies, the Malaysian government remains committed to a high level of self-sufficiency in some food products, especially rice. Current government policies, as reflected in the *Ninth Malaysia Plan*, aim to revitalise agricultural production to become one of the engines of economic growth. Currently, there are government controls on domestic prices for specific food products, including wheat flour and sugar, and regulations on food imports. Some of those regulations impose additional costs to exporters and/or could restrict access to Malaysia's domestic market.

Malaysia's continuing economic growth and industrialisation are likely to place considerable pressure on its policy of increasing food self-sufficiency. With competitive pressure for resources from non-agriculture sectors, there is likely to be limited capacity to increase agricultural production. In broad terms, freer trade practices in Malaysia could lead to more efficient allocation of domestic resources to sustain high economic growth.

This report discusses the current conditions of agricultural consumption, production and imports in Malaysia. It also analyses the current market access arrangements and the implications for Australia as a major agricultural exporting country to Malaysia.

2 Major trends in agricultural production

Growth in agricultural production has weakened

Growth in agricultural production in Malaysia has been declining, from an annual average of around 6.5 per cent in the 1960s to 3 per cent in the first half of the 2000s.

Limited availability of arable land has been a major contributor to this slow-down in growth in agricultural production. The increase in agricultural land has slowed from an annual average of around 2.7 per cent in the 1960s to an estimated rate of 1.61 per cent in the first half of the 2000s.

Strong competition for resources from the manufacturing sector has led to a significant decline in the share of agriculture in total employment, from around 26 per cent in 1990 to 15 per cent in 2006. Many male farm workers have migrated to urban areas and, as a result, women have become the major source of labour supply in many rural areas, providing around 75 per cent of the labour force in areas such as Sabah (Masud and Paim 2004).

Crop production

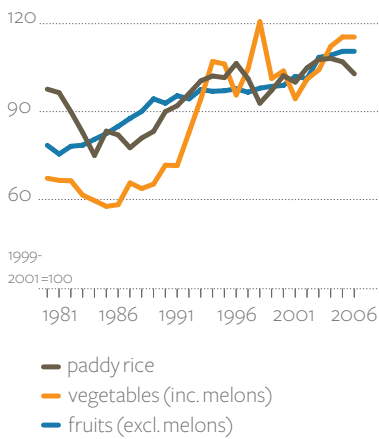
Cropping productivity has been lagging

Another reason for the decline in agricultural output growth is a weakening in overall agricultural productivity. This has especially been the case in the cropping sector, with growth in productivity in the sector slowing from an annual rate of around 3 per cent in the period 1961–80 to a mere 0.67 per cent in 1981–2001 (Avila and Evenson 2003).

Overall, the key Malaysian agricultural commodities are palm oil, rubber and forestry products, accounting for around 60 per cent of the total agricultural output. Paddy rice accounts for 3.4 per cent, while coconut, vegetables, fruit, tobacco and pepper have, in aggregate, a share of 15.2 per cent (Wong 2007).

Palm oil is the dominant Malaysian agricultural product. Malaysia is the second largest producer of palm oil following Indonesia. Malaysia accounted for 43 per cent of global palm oil production in 2006 (USDA 2007). To remain internationally competitive, Malaysian palm oil producers

b Selected crops production index



Despite a significant increase in the mid-1990s, production of vegetables declined in the late 1990s and early 2000s, before a gradual recovery in recent years (figure b). The significant increase in production of vegetables in the mid-1990s was largely because of an expansion of the planting area and the efforts of the Malaysian government to consolidate the industry into larger farms (SEARCA 2006). Slow growth in recent years in the production of food crops such as rice, vegetables and fruits mainly reflects a lack of productivity improvement.

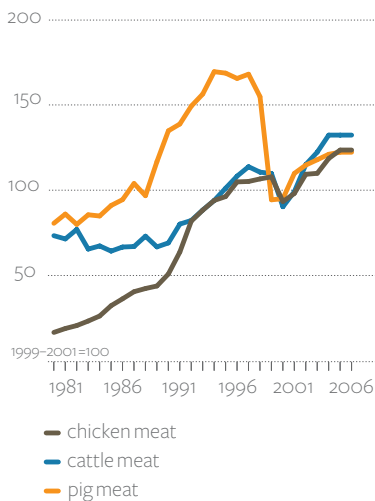
Livestock production

Livestock production dominated by poultry

In contrast, production increases in the livestock sector have been relatively strong, with annual average productivity growth of around 3.7 per cent achieved since the 1960s. The improvement in breed genetics has been the major contributor to productivity growth in the livestock sector, in which poultry is the dominant industry (Chang 2005).

Poultry is the most viable livestock industry in Malaysia. Its productivity is the highest in the agricultural sector in Malaysia and close to international standards (Chang 2005). Production is mainly undertaken by large commercial operations, which benefit from economies of scale and have strong links with the food processing industry.

C Malaysia's livestock production index



The pig industry was one of the fastest growing industries prior to the Nipah virus outbreak in 1998 and 1999, which resulted in a massive culling (figure c). The recovery in the pig industry has been slow since then. Domestically, pig meat is mainly consumed by ethnic Chinese, who account for around 25 per cent of the population. The relatively small domestic market is insufficient to provide significant support for growth in the pig industry, while export opportunities have been limited by high production costs compared with those of neighbouring competing countries, such as Thailand (Moore 2007).

The beef and dairy industries are small in Malaysia. There are many factors constraining growth in these industries. For example, the warm and humid climatic conditions are unfavourable for beef and milk production, especially with limited farm land available for pasture. In addition, the beef and dairy industries consist mainly of smallholders with relatively small herd sizes. As a result, it is difficult for the industries to achieve productivity gains and economies of scale, and to compete with imports.

3 Agricultural policies in Malaysia

Agricultural policies in Malaysia have emphasised supporting a higher level of food self-sufficiency. In recent years, there has also been a renewed focus on developing the food processing industries.

Rice production policy

While rice accounts for only around 3 per cent of agricultural output, it is the most important crop in setting agricultural policy in Malaysia. Rice farming is associated with traditional living styles of the Malays, and incomes of rice farmers are relatively low.

The Malaysian government provides various programs to support rice farmers, including fertiliser and investment subsidies and a guaranteed minimum domestic price. Among the different support measures, the guaranteed minimum price for rice has incurred a significant budgetary cost to the Malaysian government, estimated at 186.7 million Malaysian ringgits (or around US\$57 million) in 2004. The guaranteed minimum price has been implemented through a trading company, BERNAS, which buys paddy rice from farmers at the current level of 65 ringgits (or US\$18) per 100 kilograms. In addition, all rice farmers receive a subsidy of 25 ringgits (or US\$7) per 100 kilograms of padi delivered to a licensed mill or drying facility (Hoh 2006a).

Self-sufficiency targets

Malaysia's food self-sufficiency rates are very low for milk, mutton and beef (table 1). In contrast, self-sufficiency rates for fruit, poultry, eggs and pig meat are high. Under the *Ninth Malaysia Plan 2006–2010*, the Malaysian government intends to increase production of some key agricultural commodities to raise the level of self-sufficiency. These commodities include rice, beef, sheep meat, milk, fruit and vegetables (see box 1). Despite this policy aim, it is unlikely a significant increase in self-sufficiency will be achieved in the short to medium term, given the limited resources in agriculture and strong competition for resources in other sectors of the economy. Malaysia is expected to remain highly dependent on imports of many agricultural products, including beef, dairy products, sheep meat and, to a lesser extent, rice.

1 Food self-sufficiency in Malaysia (per cent)

	1995	2000	2005	2010 ^a
Rice	76	70	72	90
Fruits	89	94	117	138
Vegetables	72	95	74	108
Fisheries	92	86	91	104
Beef	19	15	23	28
Mutton	6	6	8	10
Poultry	111	113	121	122
Eggs	110	116	113	115
Pork	104	100	107	132
Milk	3	3	5	5

^a Targets set by the Ninth Malaysia Plan 2006–2010.

Source: Economic Planning Unit (2006).

The food processing industry

The *Ninth Malaysia Plan 2006–2010* emphasises the promotion of value adding in agricultural production. This partly reflects the growing importance of the food processing industry in the manufacturing sector. The food processing industry accounts for nearly 10 per cent of Malaysia's manufacturing output. Food manufacturing sales increased by around 10 per cent to US\$3.9 billion in 2005 (Chang 2006).

Malaysia's food processing industry has been successful in competing with imports in the domestic market, as foreign competitors have found it difficult to match domestic prices and the local flavours of domestic brands. For example, chicken frankfurters, cocktail sausages and burgers that were

box 1 The Ninth Malaysia Plan 2006–2010

In 2006, the Malaysian government launched the *Ninth Malaysia Plan 2006–2010*, which focuses on developing the so-called 'new agriculture'. The plan aims to spur large-scale commercial farming, higher value adding processing activities and the adoption of biotechnology in agricultural production.

In livestock production, the plan encourages the adoption of modern production systems and improved animal breeds to enhance the industry's competitiveness. The plan also aims to encourage large-scale fruit production for particular varieties that have export potential through the establishment of fruit production zones.

For rice, the plan focuses on raising productivity to achieve a yield target of 10 tonnes per hectare. Farmers will be encouraged to cultivate higher yield rice varieties, or to convert their land to alternative uses.

Other key production targets of the plan are to increase milk, beef, sheep meat and fruit production by more than 50 per cent between 2005 and 2010.

Source: Economic Planning Unit 2006.

imported are now produced locally (Chang 2005). Despite the increased competitiveness of the food processing industry, most of the intermediate inputs in food processing are imported (Spire Research Consulting 2005). This provides an opportunity for major food exporting countries, such as Australia, to work closely with the local food processing industry and help drive its expansion. The Malaysian government aims to develop the food processing industry with a particular emphasis on halal food products, which have the potential to expand into international markets.

4 Changing food consumption in Malaysia

2 Malaysia's food consumption per person

daily calorie intake	1990 calories	2005 calories
Vegetable products	2 303	2 552
Animal products	337	383
Total	2 639	2 935
Consumption per person	kg	kg
Cereal	160.3	171.6
Wheat	32.6	57.6
Rice	118.2	99.9
Maize	6.1	9.3
Starchy roots	26.1	22.8
Cassava	20.9	13.6
Potato	3.2	6.4
Sweet potato	0.3	0.5
Sugar crops	206.9	383.2
Pulses	2.7	2.6
Oil crops	133.9	90.4
Vegetables	26.1	49.2
Fruits	55.2	57.9
Meat	35.3	47.6
Chicken meat	20.1	31.8
Duck and goose meat	2.1	4.0
Bovine meat	2.8	4.7
Pig meat	9.7	6.2
Sheep and goat meat	0.6	0.9
Milk, whole, fresh	32.9	43.5
Eggs	14.1	12.0
Fish	48.0	57.3

Source: FAO (2007).

As in other rapidly emerging markets in Asia, food consumption in Malaysia has shifted away from starchy staples and toward wheat-based and livestock products. As well as rapid growth in income per person (at around 5 per cent a year), aggregate food consumption in Malaysia has been supported by relatively high population growth (around 2.5 per cent a year) and changing consumer preferences toward more Western styles.

Malaysians belong to three distinct ethnic groupings. Close to 50 per cent of the total population is Malay, about a quarter is Chinese and the rest are predominantly Indian.

Each grouping has particular food preferences. Malays are largely Muslims and shun pork-based food items and require food to be prepared using halal methods. In contrast, the Chinese are major pork consumers and have a more diverse diet. Indian cuisines are rich in meat, spices and bread.

Consumption of wheat and meat is increasing

There has been a significant increase in per person consumption of wheat, from 33 kilograms in 1990 to 58 kilograms in 2005 (table 2). In contrast, rice consumption per person declined by around 15 per cent over the same period. Despite this development, rice remains the major staple and provides close to one-third of daily calorie intake on average. Per person consumption of starchy roots also declined markedly between 1990 and 2005, with a significant decline in consumption of cassava.

Meat consumption on a per person basis increased significantly between 1990 and 2005. Chicken meat is the main meat type consumed in Malaysia, accounting for more than 60 per cent of total meat consumption.

Consumption of other meats, except pig meat, also increased over the same period. Fish consumption on a per person basis rose from 48 kilograms in 1990 to 57 kilograms in 2005. Other significant increases over the same period were sugar, fruit, vegetables and milk (table 2).

Meat consumption relative to other countries

In terms of consumption patterns for various food products (expressed in calories per person per day), Malaysia appears similar to other fast-growing, emerging markets in Asia such as Thailand, China and the Republic of Korea (table 3).

Malaysia's consumption of livestock products is considerably below that of many Organisation for Economic Cooperation and Development (OECD) countries, including the United States and Australia. In 2005, Malaysian meat consumption per person was 51 per cent and 53 per cent respectively below the levels in the United States and Australia. For milk, the consumption level in Malaysia is significantly lower than in the OECD countries.

However, compared with other rapidly growing Asian countries, Malaysia's per person consumption of livestock products is relatively high. For example, per person consumption of meat in Malaysia was around 48 kilograms in 2005. This compares with around 35 kilograms in both Japan and the Republic of Korea and 24 kilograms in Thailand.

3 Consumption of food in Malaysia and other selected countries in 2005

	Malaysia	Thailand	India	China	Korea, Rep.of	Japan	Australia	United States
Daily calorie intake	calories	calories	calories	calories	calories	calories	calories	calories
Vegetable products	2 552	2 740	2 339	2 391	2 532	2 232	2 116	2 627
Animal products	383	244	182	571	409	431	953	1 031
Total	2 935	2 985	2 521	2 962	2 941	2 664	3 069	3 658
Per person consumption	kg	kg	kg	kg	kg	kg	kg	kg
Cereals	171.6	164.7	206.6	188.1	215.7	173.0	98.8	177.0
Starchy roots	22.8	145.2	23.3	75.3	19.1	38.3	54.0	57.3
Oil crops	90.4	67.3	50.4	71.4	86.7	68.4	101.4	80.0
Fruits	57.9	72.4	35.9	57.6	64.6	58.3	98.7	122.6
Vegetables	49.2	31.5	68.0	290.0	251.4	130.4	100.0	125.4
Sugar crops	383.2	396.1	201.4	76.9	123.5	119.1	254.9	173.2
Meat	47.6	23.9	4.8	60.1	34.6	34.7	89.4	93.6
Milk	43.5	24.6	68.6	17.8	39.6	75.3	221.4	256.2
Eggs	12.0	8.7	1.9	18.2	11.0	18.6	7.4	14.8
Fish	57.3	31.0	4.6	25.4	51.0	64.7	22.7	23.4

Consumer purchases from supermarkets

An important feature of growth in food consumption in Malaysia is increased sales from supermarkets and hypermarkets. These markets, with modern food storage facilities, have become an important outlet for chilled and frozen foods.

In 2005, supermarkets (where most processed food is sold) accounted for 34 per cent of total food retail sales (at around US\$3.4 billion). Most supermarkets operate in the urban areas and many are large foreign-owned chain outlets such as Carrefour, Makro, Dairy Farm Holdings International and Jaya Jusco. In 2005, Jaya Jusco reported growth in food sales of around 10 per cent in Malaysia (Chang 2006).

5 Malaysia's agricultural import trends

Malaysia's total agricultural imports were around US\$6.6 billion in 2006. The major agricultural imports are vegetables (valued at US\$451 million in 2006), dairy products (US\$444 million), maize (US\$398 million) and sugar (US\$391 million) (figure d). Other main agricultural imports are rice, wheat, oilseeds and cotton, each valued at around US\$280 million.

Imports of many agricultural commodities, such as vegetables, maize, sugar and dairy products, fell significantly in 1998 during the Asian financial crisis (figure e). Over the past few years, however, imports of these commodities have grown strongly, reflecting strong income growth.

Australia is a major source of food imports

Australia is the leading agricultural exporter to Malaysia (figure f). Other major agricultural exporters are China, Thailand, the European Union and the United States. While Malaysia's imports from Australia, the European Union and the United States were lower in recent years compared with the mid-1990s, imports from Thailand and China have increased.

China and Thailand are major suppliers of a number of agricultural commodities to Malaysia. Major imports from China include vegetables, maize, oilseeds and cotton, while major imports from Thailand include rice, vegetables and sugar. Malaysia's trade with these two countries has been increasing significantly, particularly imports of vegetables from China and rice from Thailand.

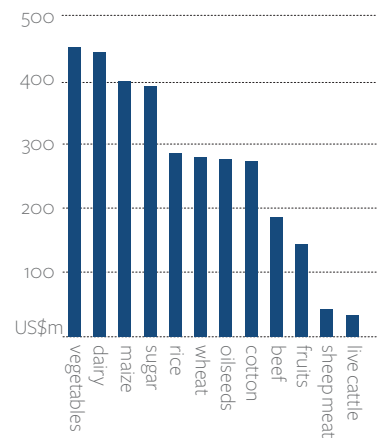
Key agricultural imports from Australia

The key agricultural imports from Australia are wheat (valued at US\$198 million in 2006), sugar (US\$178 million) and dairy products (US\$112 million) (figure g). Other agricultural imports that are important for Australia include wool and live cattle, each valued at more than US\$30 million.

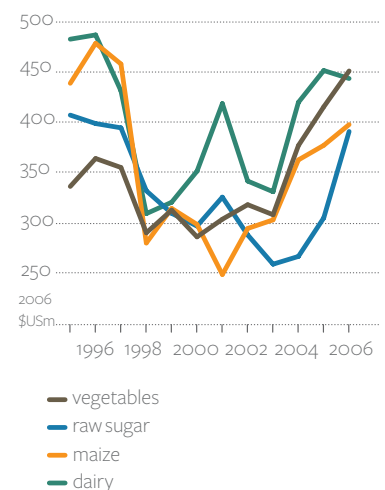
Wheat

Malaysia does not produce wheat and therefore is totally dependent on imports to meet domestic consumption. In 2006, wheat imports in Malaysia were worth around US\$280 million, with more than 70 per cent sourced from Australia. The remaining wheat imports came mainly from Canada and the United States.

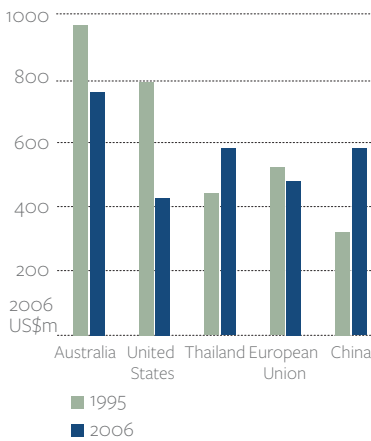
d Malaysia's major agricultural imports in 2006



e Malaysia's imports of vegetables, maize, sugar and dairy products



f Malaysia's total agricultural imports by major sources



Growing domestic consumption of wheat-based products and increased exports of processed food, such as noodles, biscuits and bakery products, have led to higher demand for wheat imports in Malaysia. However, the actual amount of wheat that will be imported will be affected by the state-imposed price controls on flour. For example, if the price ceiling set by the government for flour is low relative to the prices of imported wheat, flour millers are unlikely to increase their purchases of wheat (Whitley 2007).

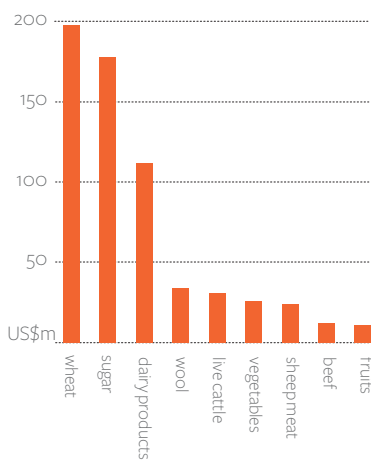
Sugar

In Malaysia, the cultivation of sugarcane is small. The area harvested ranges from 20 000 to 24 000 hectares and yields are low. The small production of sugarcane reflects partly the reallocation of resources to other crops, such as palm oil because of their higher returns. In addition, Malaysia's climatic conditions limit cultivation of sugarcane. Malaysia's sugar imports account for two-thirds of its sugar requirements (Spire Research Consulting 2005).

Sugar production in Malaysia is monopolised by four producers. Any shortfalls are met by imports through licences issued to refiners. An equal amount of raw sugar imports is allocated to each mill (Hoh 2006a).

Domestic sugar prices in Malaysia are administered by the Ministry of Domestic Trade and Consumer Affairs, which is responsible for setting domestic prices of many agricultural products. A significant increase in world sugar prices since 2005 has resulted in considerable difficulty in preventing domestic sugar prices from rising above the administered levels. The price of raw sugar in the international market increased to a peak of around US\$417 per tonne in February 2006 from around US\$250 per tonne in 2005 (Ariff 2006). In the first half of 2008, the sugar price averaged around US\$300. Because domestic prices have been lower than world prices, there has been an incentive to smuggle sugar for exports from Malaysia to neighbouring countries, which results in sugar shortages in the domestic market. Producing sugar at the price set by the government is no longer economical. When the Malaysian government requested sugar producers to increase their output, they were reluctant to comply (Ariff 2006).

g Malaysia's major agricultural imports from Australia in 2006



In 2006, Australia and Brazil were the two leading raw sugar exporters to Malaysia, each accounting for around 45 per cent of sugar imports. Sugar imports from Australia and Brazil have increased in recent years, while the importance of Thailand as a source of sugar imports has declined (figure h). Australia will continue to be the major supplier of cane sugar to Malaysia at least in the short term. The Malaysian government signed a three-year agreement, effective from January 2006 to December 2008, to import sugar from Australia (Hoh 2006a).

Thailand relies on the availability of cheap labour and abundant land to produce sugar. In recent years, these resources have not been readily avail-

able to the Thai sugar industry as a result of competition from other sectors of the economy (NaRanong 2000). With rising domestic demand and weak growth in sugar production in Thailand, it is unlikely that sugar imports from Thailand will increase markedly in the short term. Thai sugar exports to Malaysia are also expected to slowdown because of strong competition from relatively cheaper Indian sugar (Prasertsri 2008).

Dairy products

In 2006, dairy products were Malaysia's third largest agricultural import from Australia. New Zealand is the largest supplier of dairy products to Malaysia, followed by Australia and the European Union. The main dairy products that Australia exports to Malaysia are milk powder and cream products. In 2006, Malaysia imported around US\$80 million worth of milk powder and cream from Australia. Australian exports of other dairy products to Malaysia include smaller amounts of cheese, whey and butter. Given sustained income growth in Malaysia, demand for Australian dairy products is likely to continue to grow. Australia is well positioned to supply this market.

Wool

Despite being a small importer, wool was the fourth largest agricultural import from Australia in 2006 (figure g). Malaysia's wool imports were worth around US\$34 million in 2006, a decline of more than 50 per cent from 1995. The Malaysian textile industry has faced increased competition from some other Asian countries such as China and India, mainly because of cheaper labour costs in those countries. More than 90 per cent of Malaysia's wool imports come from Australia.

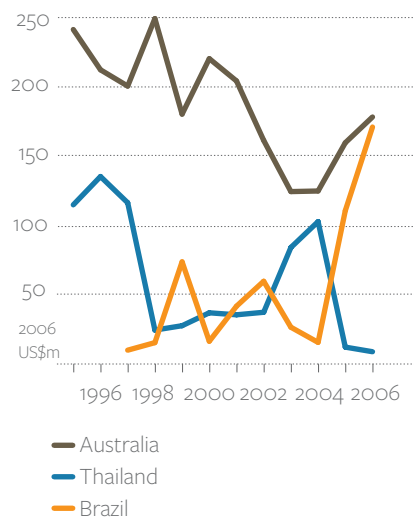
Live cattle and beef

Australia is Malaysia's largest supplier of live cattle. In 2006, Malaysia imported live cattle from Australia valued at US\$31 million. Australia's position as the dominant supplier of live cattle reflects its proximity to Malaysia, Australian cattle being able to acclimatise to tropical conditions, and Australia's disease-free status. Australian live cattle have mainly been used for improving breeding stock in Malaysia.

Overall, Malaysia imports a relatively larger amount of beef (US\$186 million in 2006) compared with live animal imports (US\$34 million in the same year). India was the largest exporter of beef to Malaysia in 2006. Beef imported from India is cheaper because of its lower quality. India also has a history of foot and mouth disease occurrences. Hence, the sustainability of India as the leading beef exporter to Malaysia depends largely on its ability to maintain its foot and mouth disease-free status.

Beef imports from Australia, New Zealand and the United States are generally of higher quality and are used in high-end food outlets and restaurants

h Malaysia's imports of cane sugar (raw) from major exporters



4 Malaysia's vegetable imports from Australia and China 1995 and 2006

US\$m	1995	2006
Cabbage, cauliflower, kohlrabi & kale		
Australia	15.4	3.4
China	0.7	38.9
Carrots, turnips, beetroot, etc.		
Australia	15.2	8.9
China	0.7	19.3
Potatoes		
Australia	2.2	2.9
China	0.6	21.6
Vegetables, leguminous dried, shelled		
Australia	4.2	7.6
China	4.6	5.0
Onions, shallots, garlic, leeks, etc.		
Australia	1.5	0.6
China	40.1	67.6
Leguminous vegetables		
Australia	2.7	0.1
China	0.1	5.8
Vegetables nes.		
Australia	1.8	1.2
China	0.5	11.9
Vegetables, dried, not further prepared		
Australia	0.5	0.1
China	6.8	12.6

Source: United Nations Statistical Division (2007).

(Chang 2006). Australia is the second largest supplier of beef to Malaysia. Australian beef exports were adversely affected in late 2005 and early 2006 because of the suspension of the halal accreditation for all but one Australian abattoir (MLA 2005). Australian beef exports to Malaysia resumed but were down by 10 per cent year on year in 2006 (MLA 2007). As of December 2007, 22 Australian abattoirs and plants had been approved by the Malaysian Department of Veterinary Services. Among these, six are cattle abattoirs and plants (Malaysian Department of Veterinary Services 2007).

Other agricultural imports

Malaysia's main agricultural imports also include vegetables, maize, rice, oilseeds and cotton.

Vegetables

China is the leading vegetable exporter to Malaysia. Other major suppliers include India, Thailand and Australia. Malaysia's imports of vegetables from China have grown strongly, from around US\$80 million in 1995 to around US\$200 million in 2006, while imports from Australia fell from around US\$60 million to around US\$25 million. Exports of some vegetables from Australia to Malaysia, such as cabbage, cauliflower, carrots and potatoes, have been facing strong competition from other exporters, particularly China (table 4). China has also significantly increased exports of other vegetables to Malaysia, including onions, shallots, garlic, leeks and potatoes. China's vegetable export advantage lies in its low wages and land costs (Huang and Gale 2006). The competitive pressures for Australian exports of vegetables are not expected to ease in the short term.

Maize

Maize is an important feed ingredient for the poultry industry. Maize imports have grown rapidly, to US\$398 million in 2006, in response to stronger demand from the poultry industry (figure d). Most of the imports are from Argentina, the second largest maize exporter in the world and, to a lesser extent China. Malaysia is China's second largest maize market. In contrast, Malaysia's maize imports from the United States are negligible. US maize imports increased only in 1995 and 1996, as a result of the absence of imports from China because of Chinese domestic production shortfalls.

Rice

Although rice consumption in Malaysia has declined, rice remains an important part of the Malaysian diet. Malaysia produces around 70 per cent of its rice consumption (Ariff 2008a). BERNAS, has been given the sole right to import rice to Malaysia until 2010 with the option to renew for another five years subject to approval (Ariff 2008b, BERNAS 2008). This is to regulate

rice imports and reduce competition with the locally produced rice (Ariff 2008b). The major rice exporters to Malaysia are Thailand and Vietnam. Malaysia's rice imports were worth around US\$285 million in 2006, an increase of around 50 per cent from 1995. Although rice yield in Malaysia (3.3 tonnes/ha) is higher than in Thailand (2.9 tonnes/ha), Malaysia's costs of production are higher than Thailand's and Vietnam's (Ariff 2008a).

Oilseeds

Malaysia imported oilseeds valued at around US\$275 million in 2006. There is no commercial cultivation of soybeans in Malaysia. The United States was the largest exporter of soybeans to Malaysia, capturing more than 50 per cent of Malaysia's soybean imports in 2006. Other major exporters are Canada and Argentina. Soybean is used in animal feed and manufactured food such as tofu, soy milk and soy sauce. Malaysia is one of the largest producers of soy drinks in South East Asia (Hoh 2008).

Cotton

Cotton is a major intermediate input to the textile industry in Malaysia. China is the largest exporter to Malaysia, with cotton exports valued at US\$56 million in 2006. Aggregate cotton imports in Malaysia have declined from US\$667 million in 1995 to US\$274 million in 2006. There are a number of challenges facing the Malaysian textile industry. In particular, there has been increased competition for the Malaysian textile industry from China and other south Asian countries, including Bangladesh and India, because of their cheaper labour (The Economist 2007). It is unlikely the textile industry in Malaysia will expand markedly so cotton imports could continue to decline in the foreseeable future.

6 Barriers to agricultural imports

Tariffs

The levels of tariff reported in this section refer to bound and applied tariffs. Bound (or Most Favoured Nation) tariffs are commitments made by World Trade Organization (WTO) members for the maximum allowable tariffs that a member country may levy on imports. Applied tariffs are the levies actually used. In Malaysia, bound tariffs for most agricultural imports are not more than 20 per cent (table 5). However, some bound tariffs are very high. Products affected include pork (139 per cent), wheat meslin flour (96 per cent), round cabbages (90 per cent) and fresh or chilled chicken cuts (85 per cent).

Despite the presence of some very high bound tariffs, applied tariffs are mostly low or zero. For example, applied tariffs for live animals, meat, cereals, most vegetables, some dairy products and sugar are zero in Malaysia. Agricultural imports that have higher applied tariffs include rice (40 per cent), yoghurt (25 per cent), sauces and mixed condiments (20 per cent), some prepared meat (15–20 per cent) and cocoa and cocoa preparations (15–19 per cent). It appears that some applied tariffs are greater than the WTO bound tariffs. For example, yoghurt, sausages in other than airtight containers and meat of swine (table 5).

Tariff quotas

In April 2008 Malaysia implemented tariff quotas on a range of agricultural products, including live swine, live poultry, meat of swine, poultry meat, milk, birds' eggs and round cabbages. Tariff quotas for these items (and some other agricultural products) were included in Malaysia's 1995 WTO tariff schedule following the Uruguay Round of multilateral trade negotiations. However, these tariff quotas had not been implemented. Prior to the implementation of the tariff quotas in April 2008, the applied tariffs for the affected products had been zero (table 5). With the introduction of the tariff quotas, the in-quota tariffs generally range from 10 to 25 per cent, while the above-quota tariffs generally range from 20 to 50 per cent (Royal Malaysian Customs 2008). Consequently, the implementation of the tariff quotas represents a significant increase in import barriers for the affected products.

Imports of these products from a number of countries that Malaysia has free trade agreements with enter Malaysia at a zero tariff (Royal Malaysian

5 Bound and applied tariffs (percentage unless otherwise stated)

	bound tariffs	applied tariffs
	2004	2006
Live animals		
Live bovine animals (except pure bred breeding)	5	0
Meat of bovine animals		
Carcasses, half carcasses, bone-in, boneless; fresh, chilled, frozen	15	0
Pig meat		
Carcasses, half carcasses, hams, shoulders bone in; fresh, chilled, frozen	139	0
Sheep meat		
Carcasses, half carcasses, bone-in, boneless; fresh, chilled, frozen	15	0
Poultry meat		
Chicken wings, fresh, chilled	56.7	0
Chicken cuts, fresh, chilled	74.2	0
	85	0
Dairy products		
Skim milk powder, unsweetened	5	0
Whole milk powder, unsweetened	5	0
Yogurt, fresh, flavoured or containing added fruit or nuts	10	25
Butter	5	2
Cheese (except for processed cheese)	10	5
Vegetables		
Potatoes	5	0
Onions, shallots, garlic, leeks	10	0
Cauliflowers, broccoli	9%+\$21.87/kg	0
Round cabbages	90	0
Carrots and turnips	9%+\$12.62/kg	0
Fruit and nuts		
Fresh oranges	20	0
Grapes fresh or dried	20	5
Cereals and flour		
Durum wheat	5	0
Other wheat and meslin	0	0
Rice (except broken rice for animal feeding)	40	40
Wheat or meslin flour	96	0
Prepared meats		
Sausages and similar products in airtight containers	15	15
Sausages and similar products in other containers	10	20
Prepared meat (except meat of swine)	15	0
Prepared meat of swine	10	15
Sugars and sugar confectionery		
Cane, beet sugar	15% or RM112.50/t w.i.t.h a	0
Cocoa and cocoa preparations		
Cocoa powder	15	19
Chocolate	15% or \$2/kg w.i.t.h a	15
Preparation of cereals		
Pasta	20	0-8

continued...

5 Bound and applied tariffs (percentage unless otherwise stated)

continued

	bound tariffs	applied tariffs
	2004	2006
Fruit juice		
Fruit juice for infant food	5	0
Fruit juice ready for immediate consumption	20	6-10
Sauces and mixed condiments		
Soy sauce	10	20
Tomato ketchup and other tomato sauces	15	20
Wine		
Wine in containers 2 litres or less	450RM/dal	MYR120/dal
Cotton		
Cotton carded or combed	5	0

a Whichever is the higher.

Source: WTO (2006b), US-ASEAN Business Council (2008), Royal Malaysian Customs (2008).

Customs 2008). These countries include other ASEAN members (under the ASEAN Free Trade Agreement) as well as China, Pakistan, Korea and Japan. As a result, for the tariff quota products, exporters from these countries to Malaysia enjoy a tariff advantage over exporters from countries that are outside these trade agreements.

Import regulations in Malaysia

BERNAS is the sole importer of rice. It handles approximately 700 000 to 900 000 tonnes per year, which is approximately 40 to 50 per cent of total rice supplies. A range of agricultural products require import licences. These include eggs, poultry, fresh or preserved meat and offal, live animals, round cabbages, sugar, cereal flour, rice and liquid milk.

All imports of non-pork meat, processed meat, poultry, egg and egg products must receive halal certification from an approved Islamic Centre. The production facilities for these products are jointly inspected by the Malaysian Department of Veterinary Services and the Department of Islamic Development.

There have been complaints from US exporters that the Malaysian halal certification process is non-transparent (United States Trade Representative 2004). As mentioned earlier, Australian exports of beef were adversely affected in 2006 as a result of changes to the halal protocol. In December 2005, a National Council of Islamic Affairs Malaysia fatwa outlined that pneumatic/mechanical stunning would be forbidden for the halal slaughtering of cattle. Only electrical stunning or the complete absence of stunning would be acceptable.

Sugar, bread and flour are among a number of basic agricultural (and non-agricultural) items subject to price controls in Malaysia. Domestic prices and imports of sugar and wheat products are controlled and predetermined by the government. Unless significant pressures on domestic prices emerge, imports will not be allowed to increase. Malaysia has indicated its intention to review its price controls with a possibility of replacing them with market oriented measures (Burton 2008). As part of this process, in June 2008 the Domestic Trade and Consumer Affairs Minister announced that ceiling prices on fresh chicken would be removed and imports of processed chicken would be allowed (NSTonline 2008). However, at this stage price controls on sugar and wheat based products remain.

Malaysia's involvement in free trade agreements

As a member of ASEAN, Malaysia is party to the ASEAN Free Trade Area (AFTA). Through its membership of the Association of South East Asian Nations (ASEAN), Malaysia is party to the Japan–ASEAN and Korea–ASEAN trade agreements. ASEAN is currently negotiating trade agreements with a number of other countries (table 6). In recent years, Malaysia has signed bilateral trade agreements with Japan and Pakistan. Malaysia is currently negotiating bilateral trade agreements with a number of countries — namely, Australia, New Zealand, India and the United States. Malaysia is committed to reduce tariffs and adopt trade facilitating protocols for member countries of those agreements.

Agreements between countries that reduce agricultural trade barriers help agricultural exporters in the partner countries. Australia, as the largest exporter of agricultural products to Malaysia, can be expected to gain from the finalisation and implementation of a free trade agreement with Malaysia. However, the size of the gain will depend on the extent and timing of the reduction of tariffs and non-tariff barriers in the agreement. As noted above, Malaysia has negotiated, or is in the process of negotiating, trade agreements with other countries. Therefore, the benefits to Australian agricultural exporters from any Australia–Malaysia free trade agreement will be influenced by any reductions in trade barriers faced by competing agricultural exporters.

6 Malaysia's trading initiatives

title	scope and status
ASEAN Free Trade Area (AFTA)	Six ASEAN members (Malaysia, Brunei Darussalam, Indonesia, the Philippines, Thailand and Singapore) to cut intra-regional tariffs to 0–5 per cent except for products in the Highly Sensitive List and the General Exception List by 2003. Some tariff cuts for Viet Nam by 2006, Laos and Myanmar by 2003 and Cambodia by 2010. Non-tariff barriers are also to be reduced. Implementation commenced in 1993.
Japan–Malaysia Economic Partnership Agreement (JMEPA)	FTA: trade in goods, agriculture, services, and investment with flexibility for sensitive sectors and economic cooperation in several sectors. The agreement was signed in December 2005.
Malaysia–Pakistan Closer Economic Partnership Agreement (MPCEPA)	Liberalisation of trade in goods, services and investment and economic cooperation. The agreement was signed in November 2007.
ASEAN–Japan Comprehensive Economic Partnership	Goods, services and investment liberalisation by 2012 and facilitation of technical and economic cooperation. The agreement was signed in March 2005.
ASEAN (except for Thailand) –Korea Free Trade Agreement	To expand two-way trade and investment by liberalising and integrating markets and at least 80 per cent of goods at zero tariff by 2009. The agreement was signed in May 2006.
Malaysia–US Free Trade Agreement (MUFTA)	FTA in goods, services, intellectual property and legal issues. Under negotiation.
Malaysia–Australia Free Trade Agreement	Under negotiation.
Malaysia–New Zealand Free Trade Agreement	To address high tariffs and non-tariff barriers and the facilitation of investment flows in agriculture and agricultural-based industries. Under negotiation.
Malaysia–India	To enhance exports of goods and services and expand cooperation in sectors such as biotechnology, software development, science and education. Under negotiation.
Malaysia–Korea	Trade in goods and services, investment promotion, economic and technical cooperation. Under negotiation.
ASEAN–India Free Trade Agreement	Goods, services and investments. The negotiations are expected to be finalised in early 2009.
ASEAN–China CECA (Comprehensive Economic Co-operation between ASEAN and China) framework	A framework agreement laying out FTA plan was signed in 2002. The FTA has been targeted to come into full force in 2010 for the six original ASEAN members and in 2015 for the other four members. An integral part of this agreement is the 'Early Harvest' program under which the phased elimination of tariffs for some products commenced in 2004. Agricultural products covered by the 'Early Harvest' program include live animals, meat, fish, dairy, vegetables and fruit.
ASEAN–Australia and New Zealand Free trade Agreement (AANZFTA)	Under negotiation.

Source: WTO 2006a, Bilateral (2007) and ASEAN (2008).

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