



Agricultural Cooperation in Asian-Pacific Region: Current Status, Outlook and Reflection

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PART ONE: AGRICULTURAL COOPERATION ALONG VALUE CHAINS



New Era for Agricultural Cooperation



Opportunities and Challenges



Opportunities

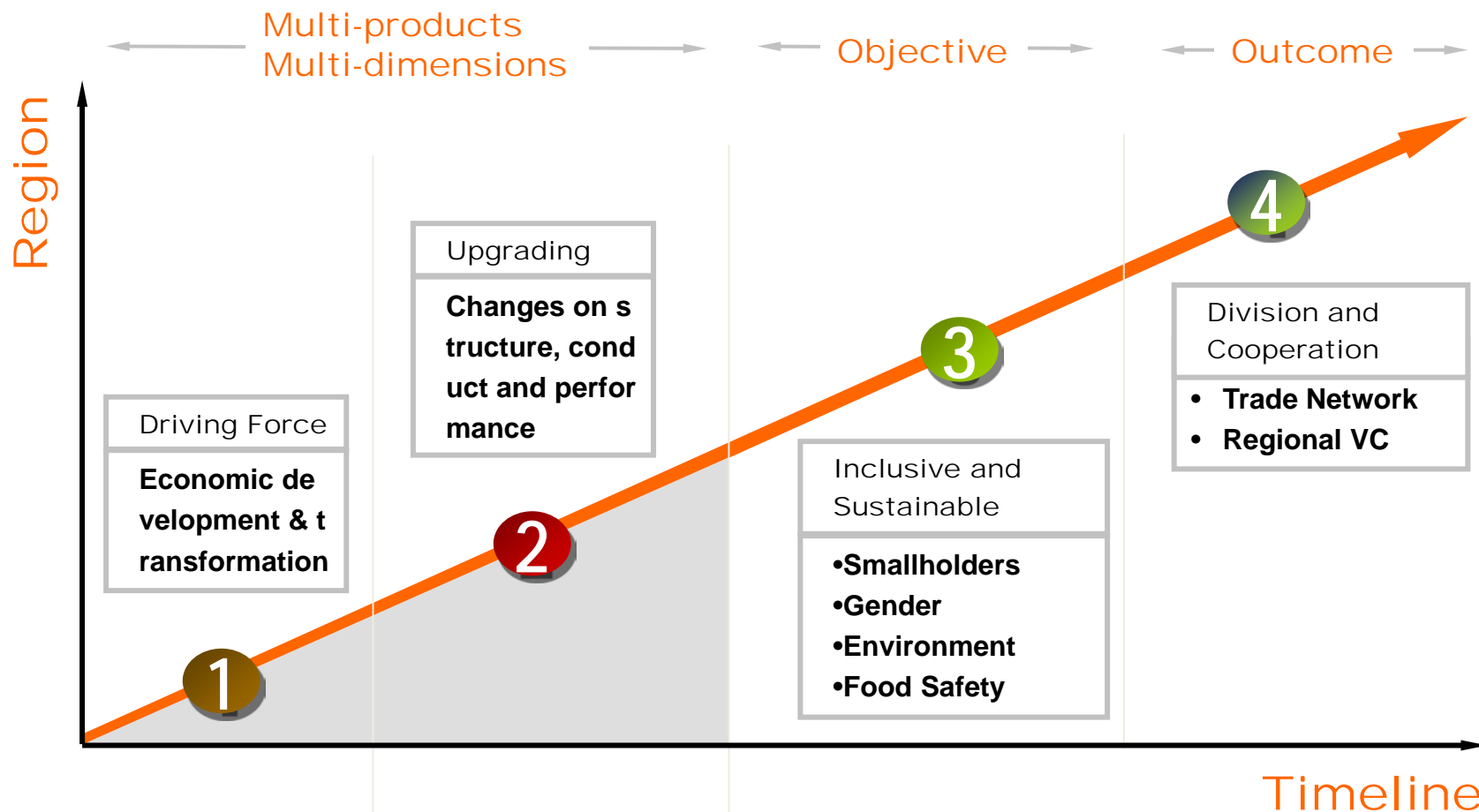
- **Stronger desire** for agricultural cooperation between international community and China
- **New impetus** for agricultural cooperation under Belt & Road Initiative
- **Solid base** for agricultural cooperation given suitable agricultural technology and machinery
- **Broder space** for agricultural cooperation due to China's agricultural structural reform



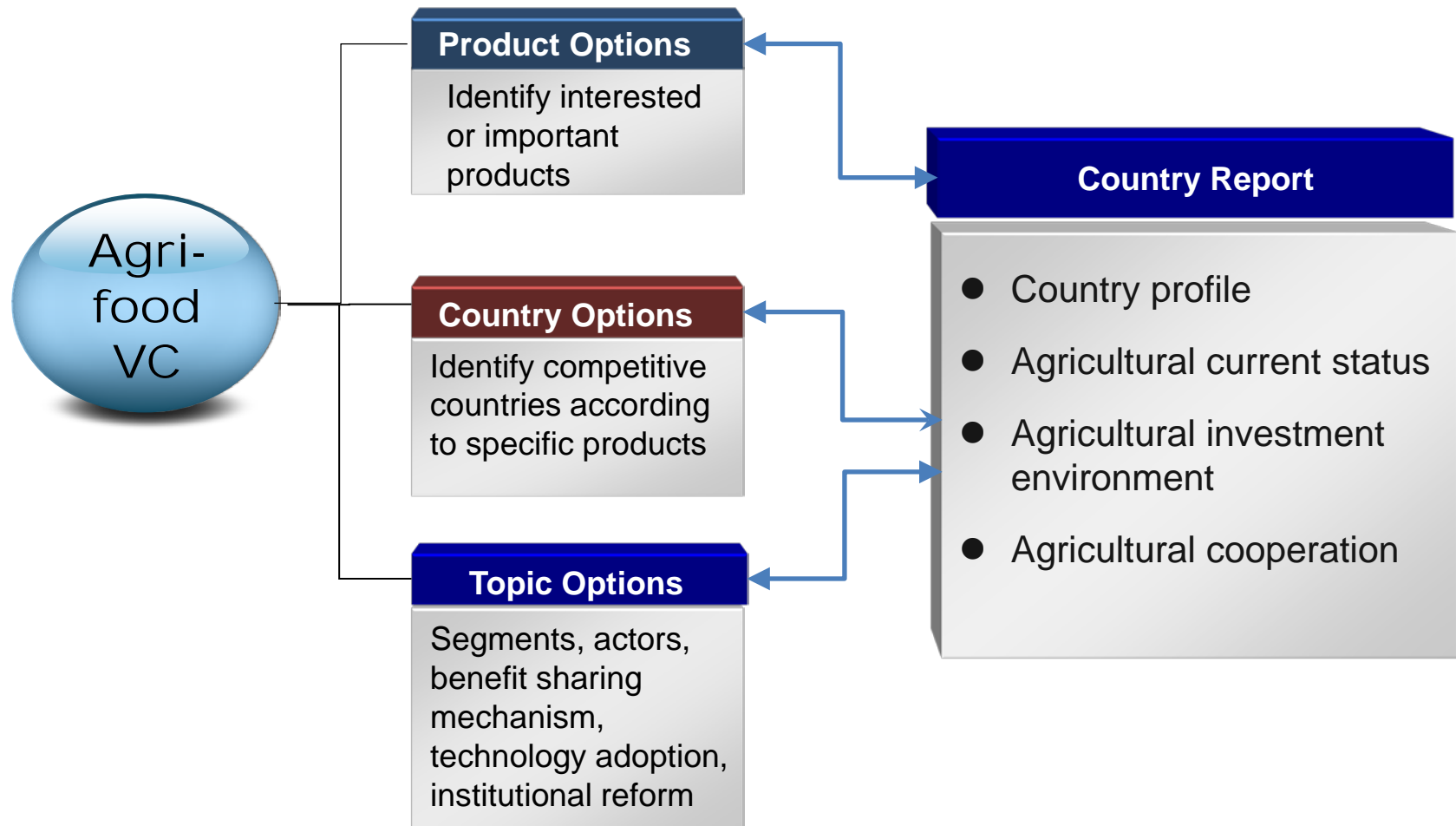
Challenges

- **Long way** to achieve the goal of global sustainable development in agricultural sector
- **Harder tasks** to ensure food security in different countries
- **More efforts** to improve the international competitiveness of agricultural enterprises
- **Low voices** of developing countries on the international stage to govern food and agriculture

Agricultural Cooperation along VC



Prioritizing value chains for analysis



County Reports



South-east Asia is an important producing area for rice, cassava, rubber and palm oil, etc.



Including Vietnam, Cambodia, Laos, Thailand, Myanmar, Malaysia, Singapore, Indonesia, Philippines, Brunei Darussalam, East Timor
(11 countries)

South Asia is an important producing area for rice, wheat, sugarcane, jute, rapeseed, cotton and tea, etc.



Including India, Bangladesh, Sri Lanka, Pakistan, Nepal, Maldives, Bhutan
(7 countries)

South East Asia

- **Grain** : 28% (production)
- **Rubber** : 90% (Planting Area)
- **Oil Palm** : more than 85% of palm oil from Malaysia and Indonesia
- **Cassava** : 29% , mainly from Thailand, Indonesia, Cambodia and Vietnam



South Asia

- **Rice** : 31.1%, India (2nd), Bangladesh (4th), Pakistan (10th)
- **Wheat** : 17.0%, India (2nd), Bangladesh (4th), Pakistan (8th)
- **Tea** : 28.4%, India (2nd), Sri Lanka (4th); 30.5% (export), Sri Lanka (3rd), India (4th)
- **Cotton** : 32.9%, India (1st), Pakistan(4th)
- **Sugarcane** : 22.4%, India (2nd), Pakistan(4th)
- **Rapeseed** : 10.7%, India (3rd)
- **Natural Rubber** : 8.3%, India (4th), Sri Lanka (13th)
- **Cattle**: 25.2%, India (1st), Pakistan (4th)
- **Sheep/Goats** : 17.8%, India (2nd), Pakistan(4th)

Key Products & Countries for Cooperation in South-east Asia



	Grain Crops	Cassava	Sugar	Natural Rubber	Palm Oil	Tree
Optimal Region	Thailand, Vietnam, Indonesia, Cambodia	Vietnam	Vietnam	Thailand, Vietnam, Indonesia	Malaysia, Indonesia	Cambodia, Indonesia, Vietnam, Malaysia
Sub-optimal Region	Laos, Philippines	Laos, Cambodia, Myanmar	Thailand, Indonesia	Myanmar, Malaysia, Philippines	Myanmar, Thailand	Laos

Key Sectors for cooperation in South Asia



Grain Crop

- Rice, wheat and maize
- Technology demonstration

Livestock Product

- Cattle, sheep, goat
- Breeding, marketing

Cash Crop

- Natural rubber, tea, vegetable and fruits
- Marketing

Agri-food Processing

- Processing
- Logistics

Agricultural Machinery

- R&D
- Investment and trade

PART TWO: A CASE: CABI AND CIAR

- All/CAAS has good cooperation relationship with CABI for many years.
- In 2016, All/CAAS and CABI Beijing Office have signed a MoU for further cooperation.
- In recent two years, CABI Beijing Office has provided several technical services for CIAR:
 - Rice Pest in Laos: A General Analysis Based on CABI's Database
 - Pest Risk Analysis: a case study from *Spodoptera frugiperda*
 - An Introduction to Green Plant Protection Technology in China
 - A Survey Report on Plant Protection Products Demand in Laos and Myanmar

Field trip in Laos and Myanmar



- Narrow the knowledge gap on pesticide market in Laos and Myanmar
- Get more understanding on demand for bio control technology in Laos and Myanmar
- Add more contents in county reports (Laos and Myanmar)



A Quick Look on Pesticide Market



- In the worldwide, pesticide market size has continued to grow.
- At current, global pesticide market has the characteristics of oligopoly
- The Asia-Pacific Region is the largest pesticide consumption area around the world in 2017.
- Bio-pesticide has become substitute for chemical pesticide in EU countries and the United States.

Pesticide sales of global corporation in 2016

Unit: 10 million US dollar

Company	Sales Amount
Syngenta	95.71
Bayer	88.37
BASF	61.82
Dow AgroSciences	46.31
Monsanto	35.14
Dupont	28.55
In total	355.90

A Quick Look on Pesticide Market



- The pesticide sector in China has started late but developed rapidly.
- Laos has preferred and had great demand for green plant protection technologies.
- Cambodia has listed pesticide sector as the potential one for investment.



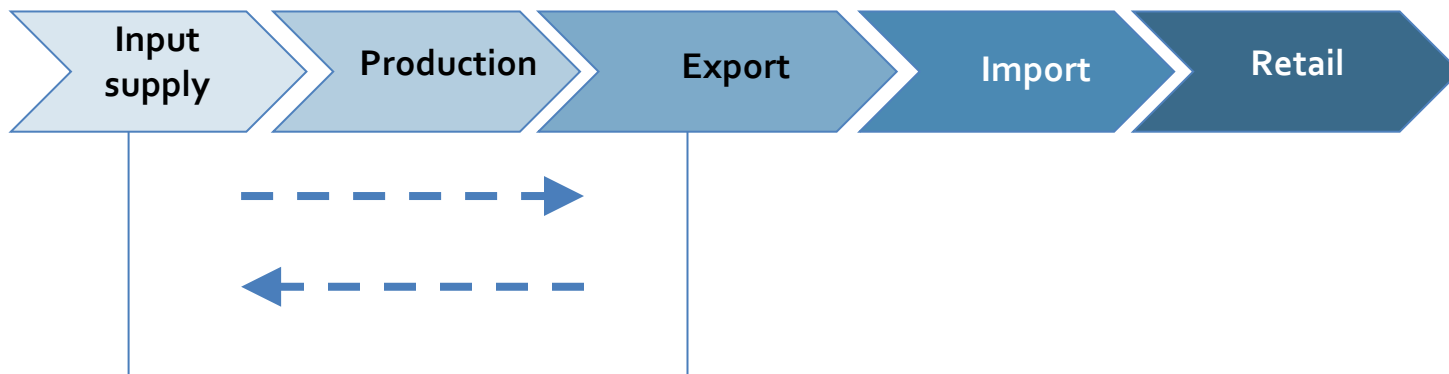
Plant Protection and Value Chain



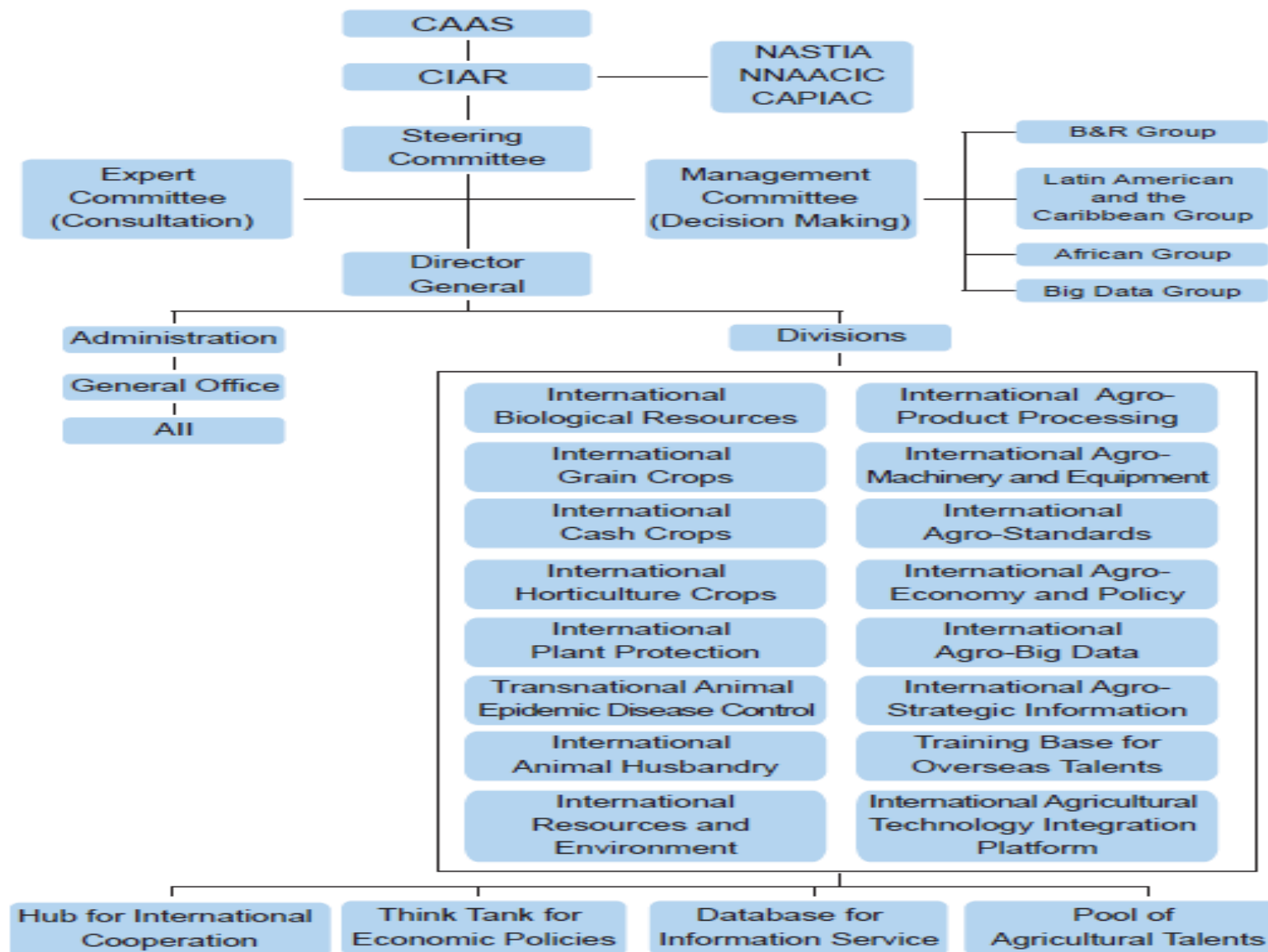
Domestic



International



An Introduction to CIAR



An Introduction to CIAR



China-Africa agricultural cooperation



- What will an adoption of Chinese hybrid rice potentially do in Africa? (IMPACT Model)
- What can an adoption of Chinese hybrid corn with enhanced cultivation technologies potentially do in Africa? (IMPACT Model)
 - The dissemination of Chinese maize technology in 8 major maize producing countries in SSA, will increase yield and harvested area.
- Is there a need to develop an integrated plan for China-Africa agricultural cooperation?

Thank you for your attention!