



Partnering for Smallholder Inclusive Market Opportunities in the Mekong



Australian Government
Australian Centre for
International Agricultural Research



Australian Government
Department of Agriculture
and Water Resources



A strategic approach to pro-poor market & consumer research in China & the Mekong

Final project workshop
8 December, 2015

Wendy Umberger, Ph.D.,
Director and A/Professor

Global Food Studies



THE UNIVERSITY
of ADELAIDE



Australian Government
Australian Centre for
International Agricultural Research

Background

- Agri-food systems in the Greater Mekong Subregion (GMS), are undergoing significant transition
 - Transition varies across countries
- GMS agricultural markets are strongly linked and increasingly integrated, linked (coordinated?)
- Significant intra-regional trade
 - Products
 - Finance and capital
 - Labour
- Domestic market and trade policy and investment decisions have regional impacts



Specific objectives

- To gain an understanding of drivers of horticultural market dynamics in the GMS
 - Supply – demand patterns
 - Trade flows
 - Changing consumer preferences
- Provide insight on the implications of dynamics for smallholders and pro-poor agribusiness development
 - opportunities
- Identify gaps in regional horticultural market data
- Develop a strategic, coordinated and collaborative approach to collection and analysis of regional horticultural market data

Complements research activities proposed in ACIAR projects

- AGB/2012/059, AGB/2012/060 and AGB/2012/061

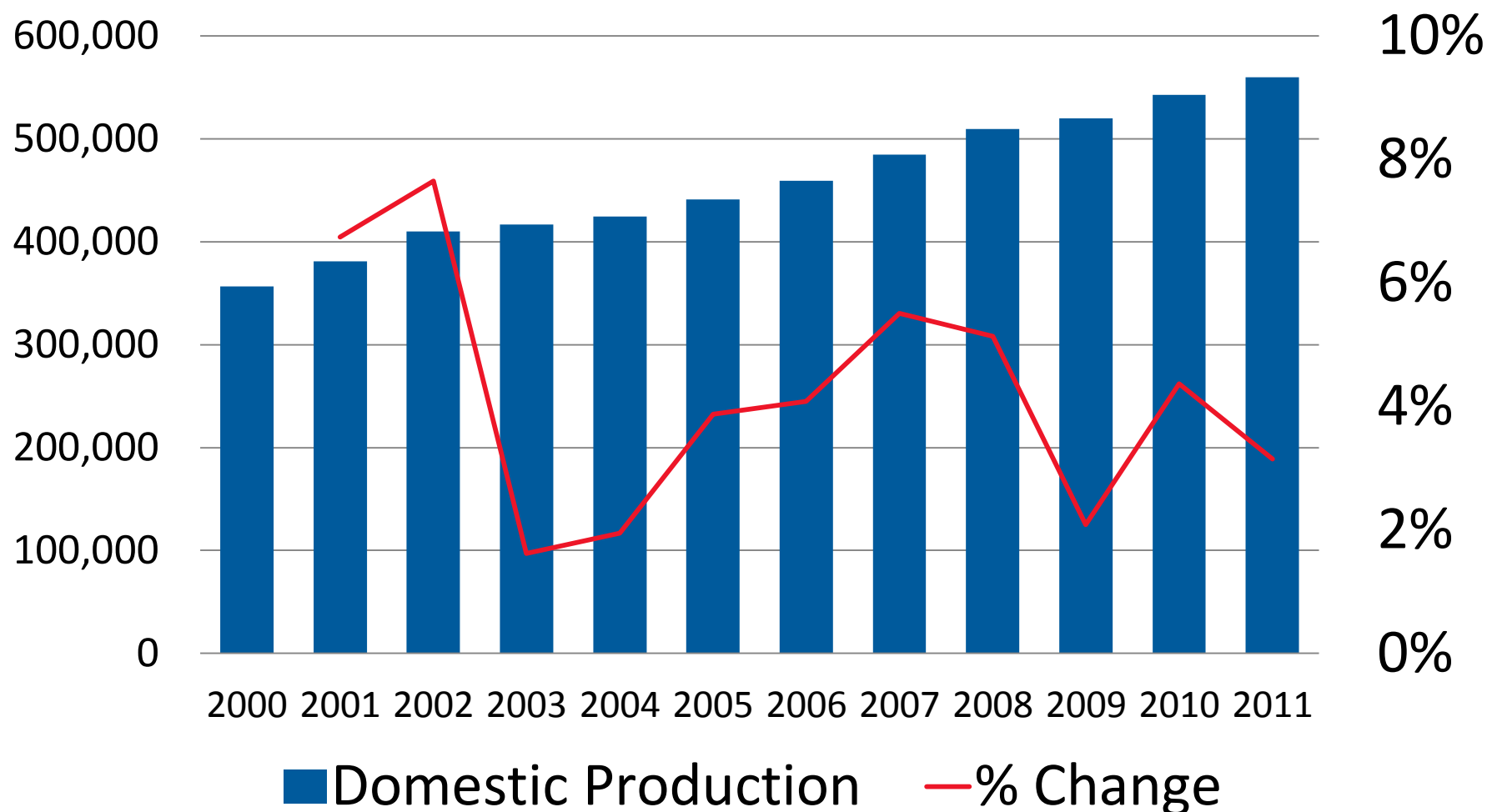
Activities

1. Desktop review and report summarizing accessible fruit and vegetable market data available for GMS
 - Determine the existence, quality and accessibility of data required to understand market dynamics for key fruit and vegetable products.
 - Trade, production, consumption, consumer preferences
-

Activities

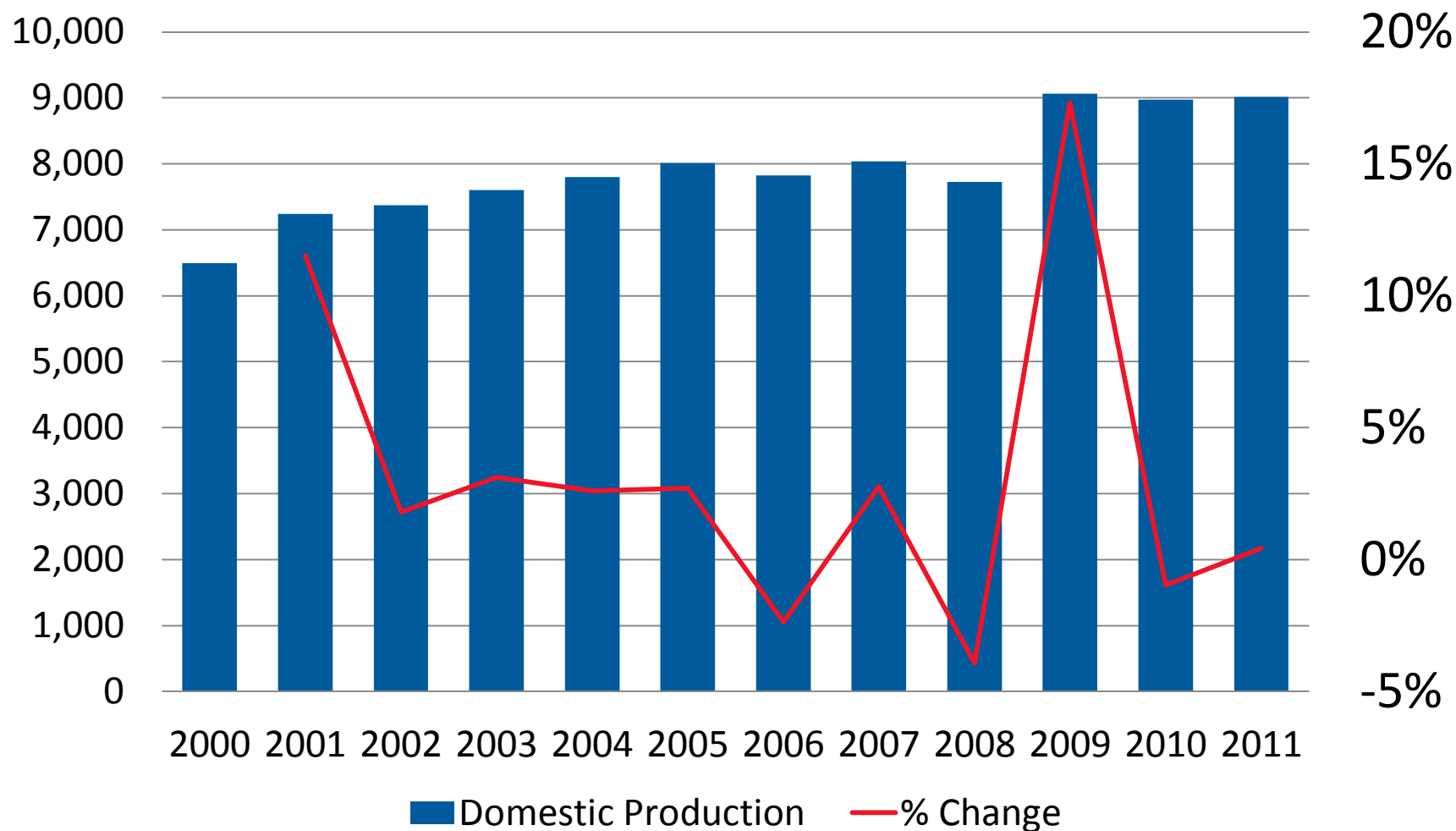
2. “Market Situation and Trade Flow” case studies to document for vegetables, tropical and temperate fruit products:
 - Key markets and market trends
 - Formal and informal trade flows of products out of NW Vietnam and into Vietnam from China.
 - Trace products through the chain including distribution and final markets
-

Vegetable Production- China (1000 Tons)



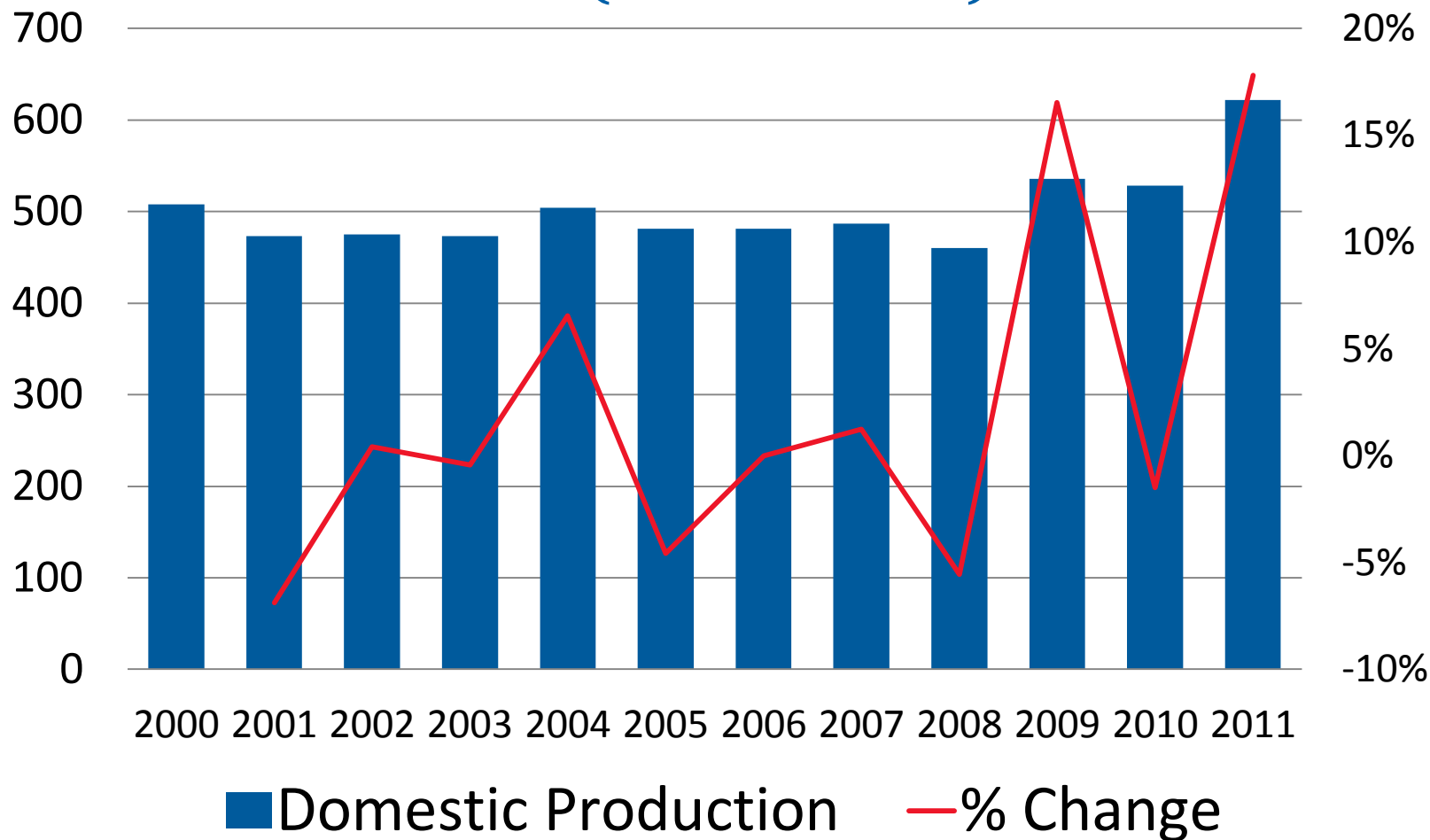
Source: Food Balance Sheet Database, FAO

Vegetable Production- Vietnam (1000 Tons)



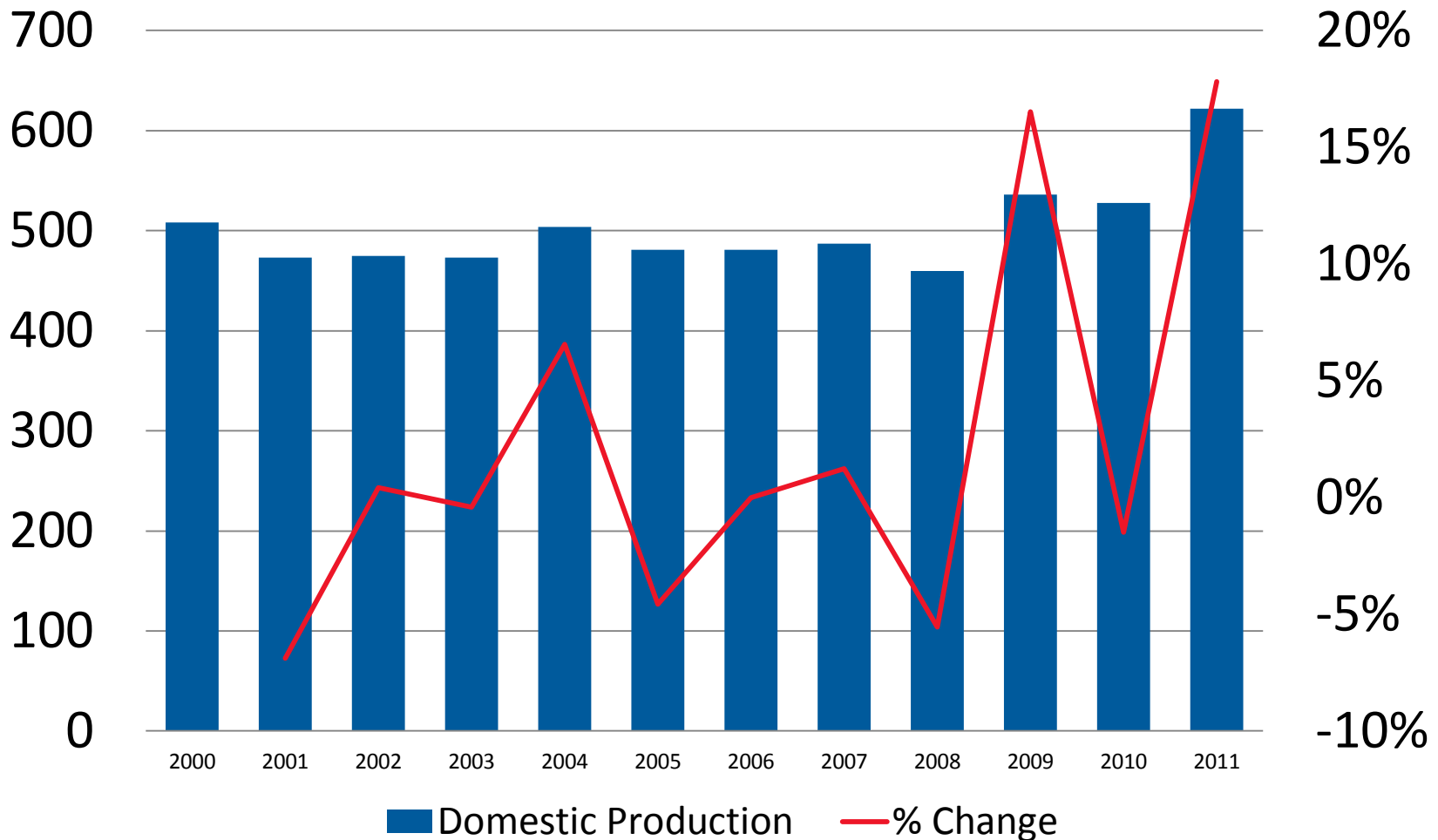
Source: Food Balance Sheet Database, FAO

Vegetable Production- Cambodia (1000 Tons)



Source: Food Balance Sheet Database, FAO

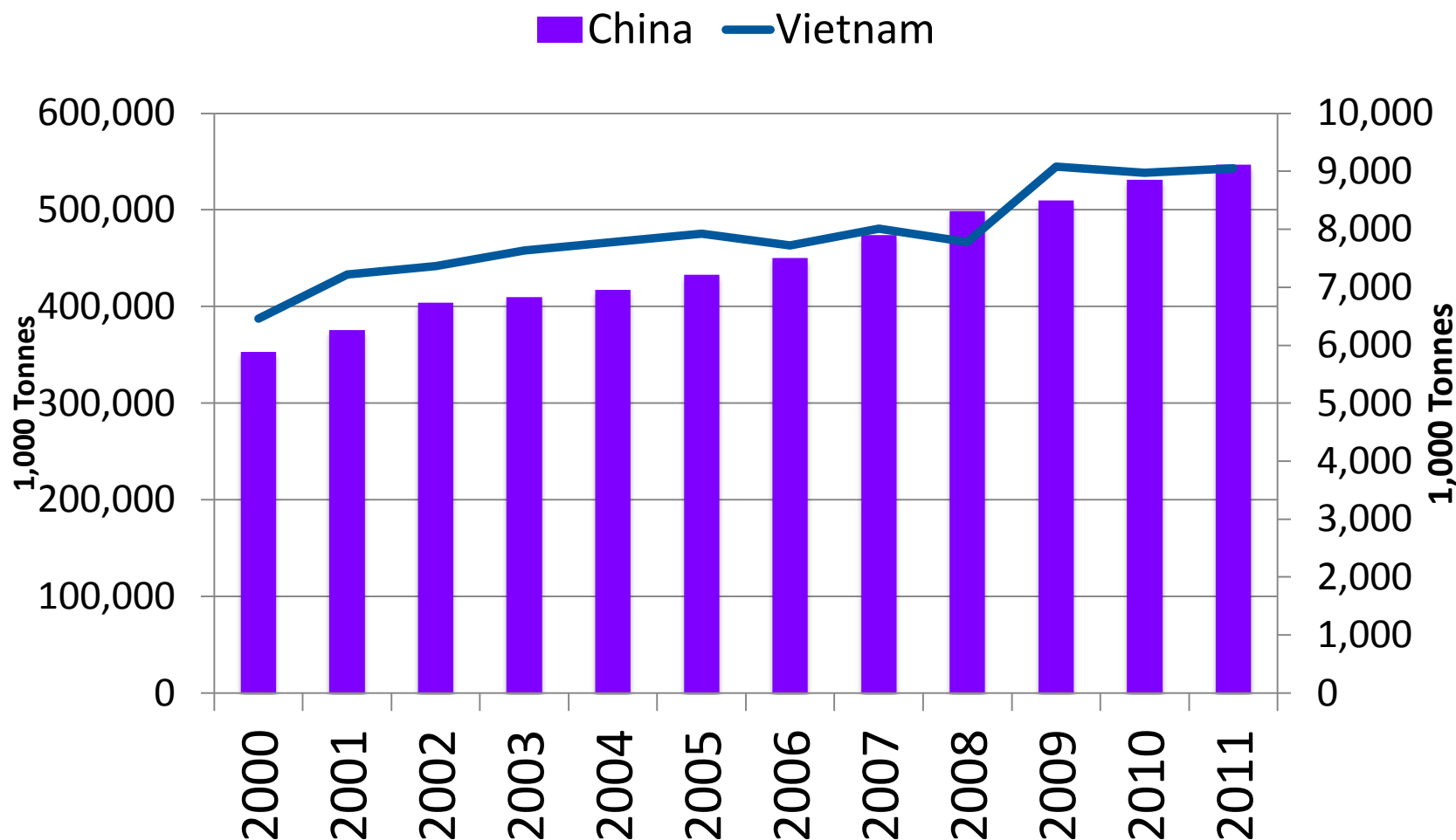
Vegetable Production- Laos (1000 Tons)



Source: Food Balance Sheet Database, FAO

China & Vietnam

Vegetable Consumption (2000-2011)

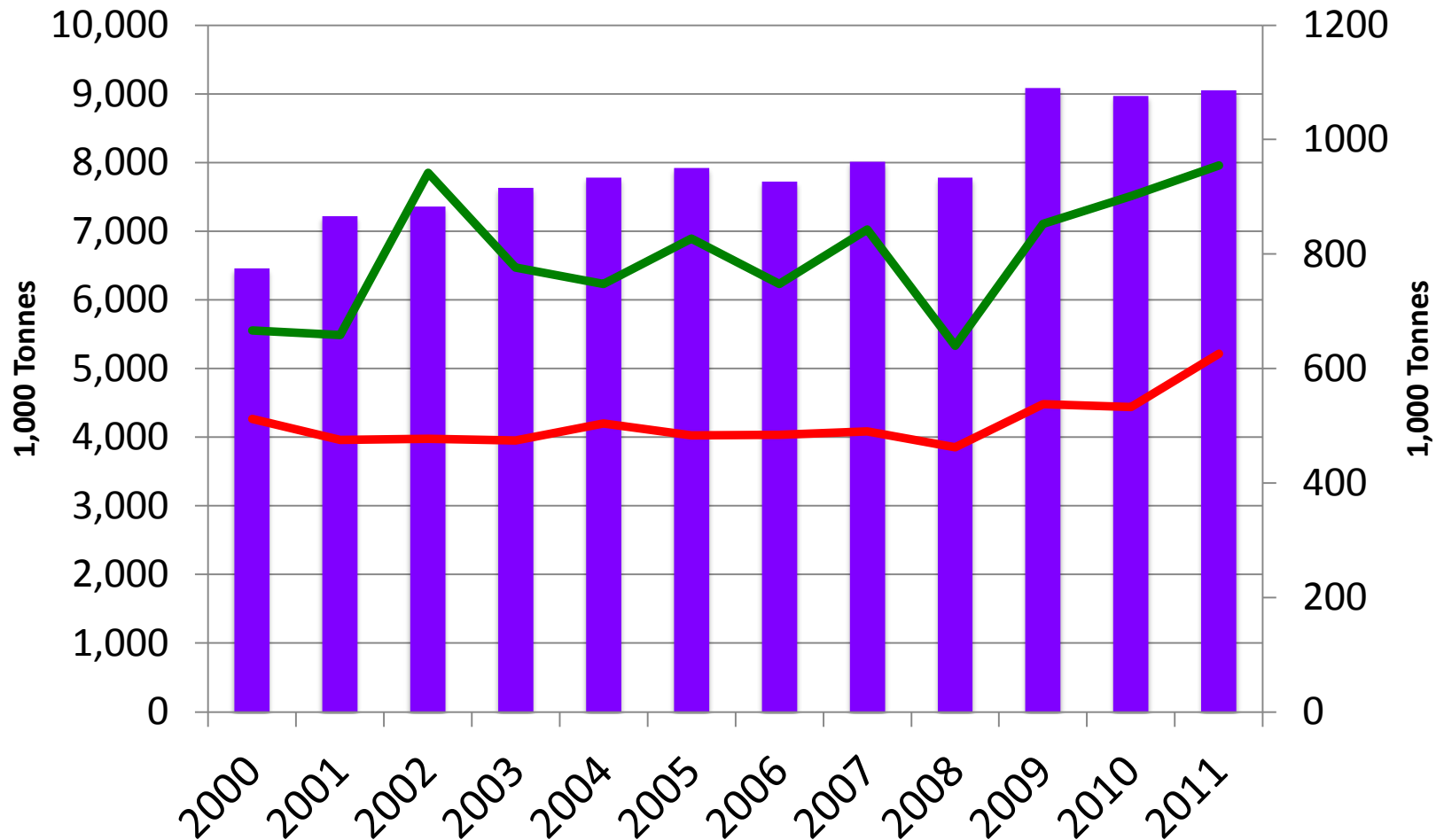


Source: Food Balance Sheet Database, FAO

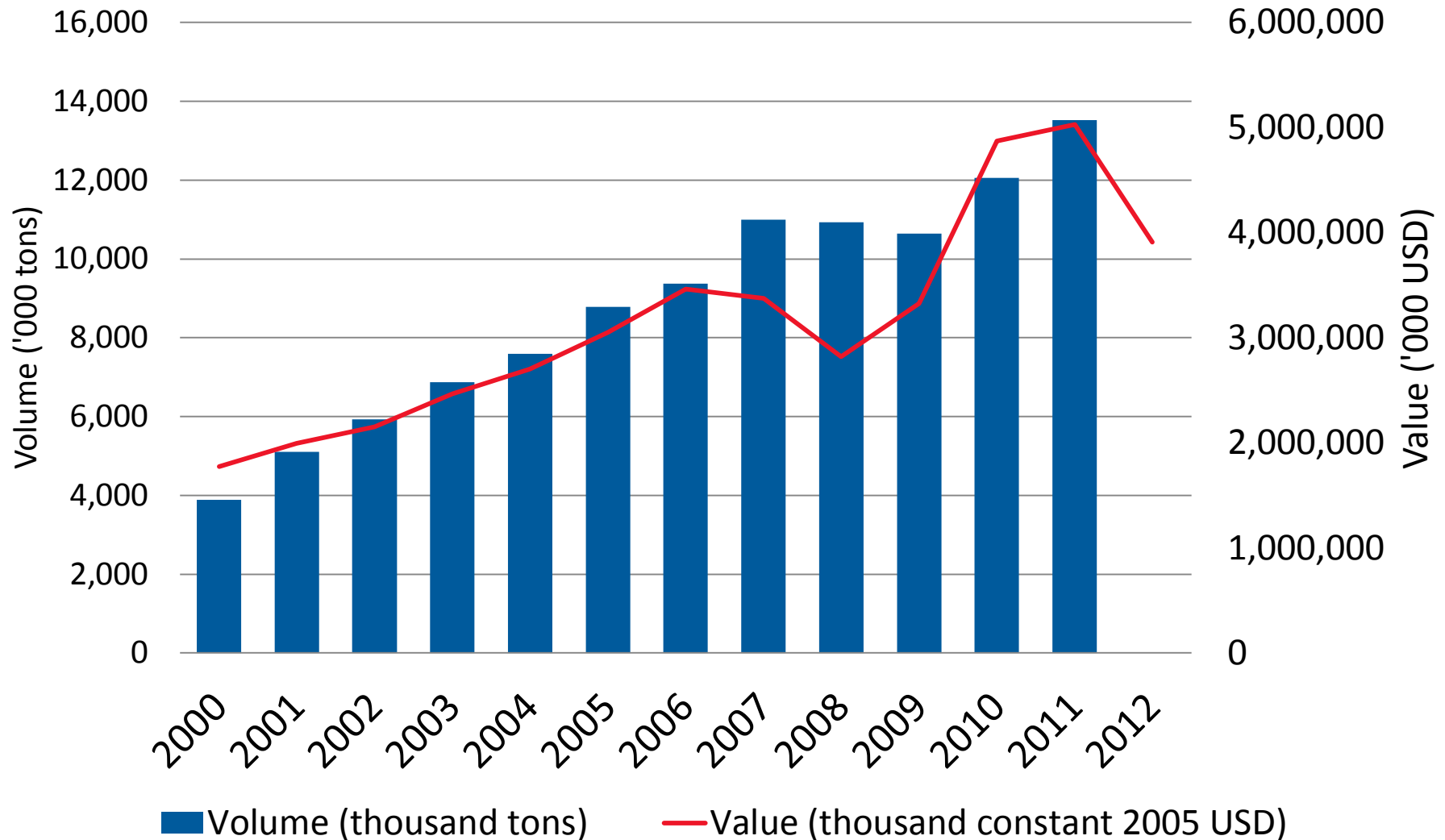
Vietnam, Cambodia & Laos

Vegetable Consumption (2000-2011)

Vietnam Cambodia Laos

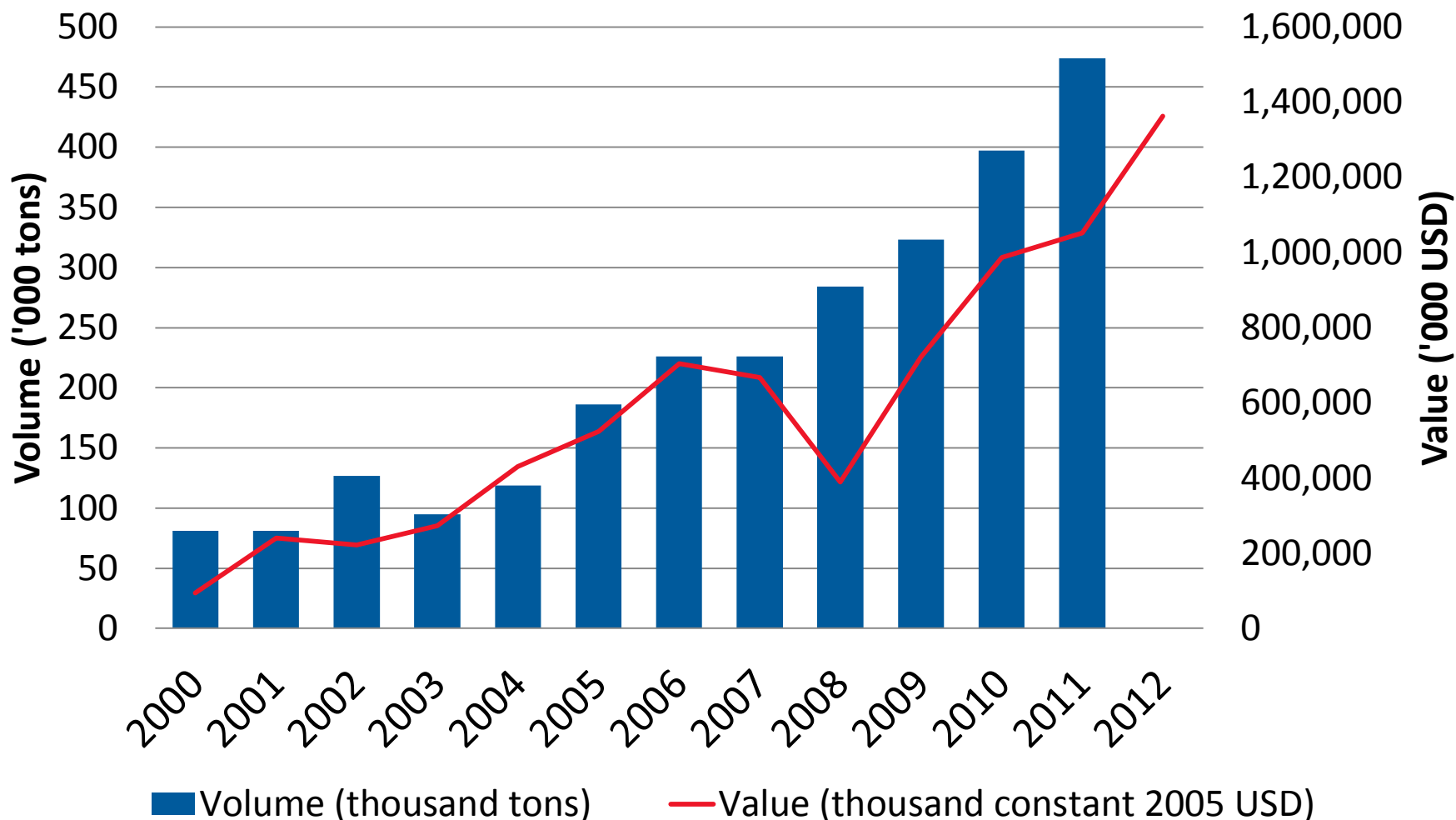


China: Exports of Vegetables (2000-2012)



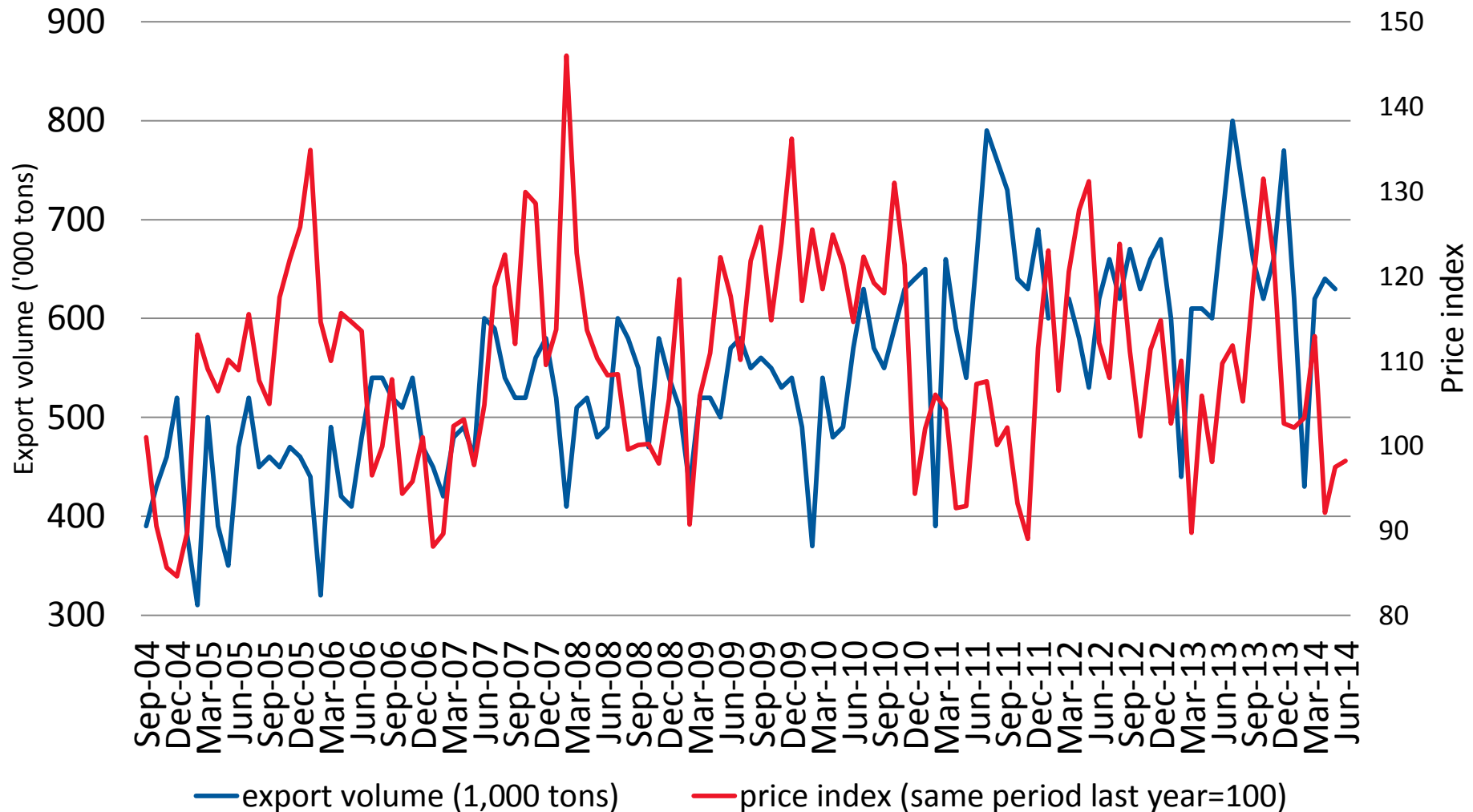
Source: Food Balance Sheet Database, FAO and UN Comtrade Database.

China: Imports of Vegetables (2000-2012)



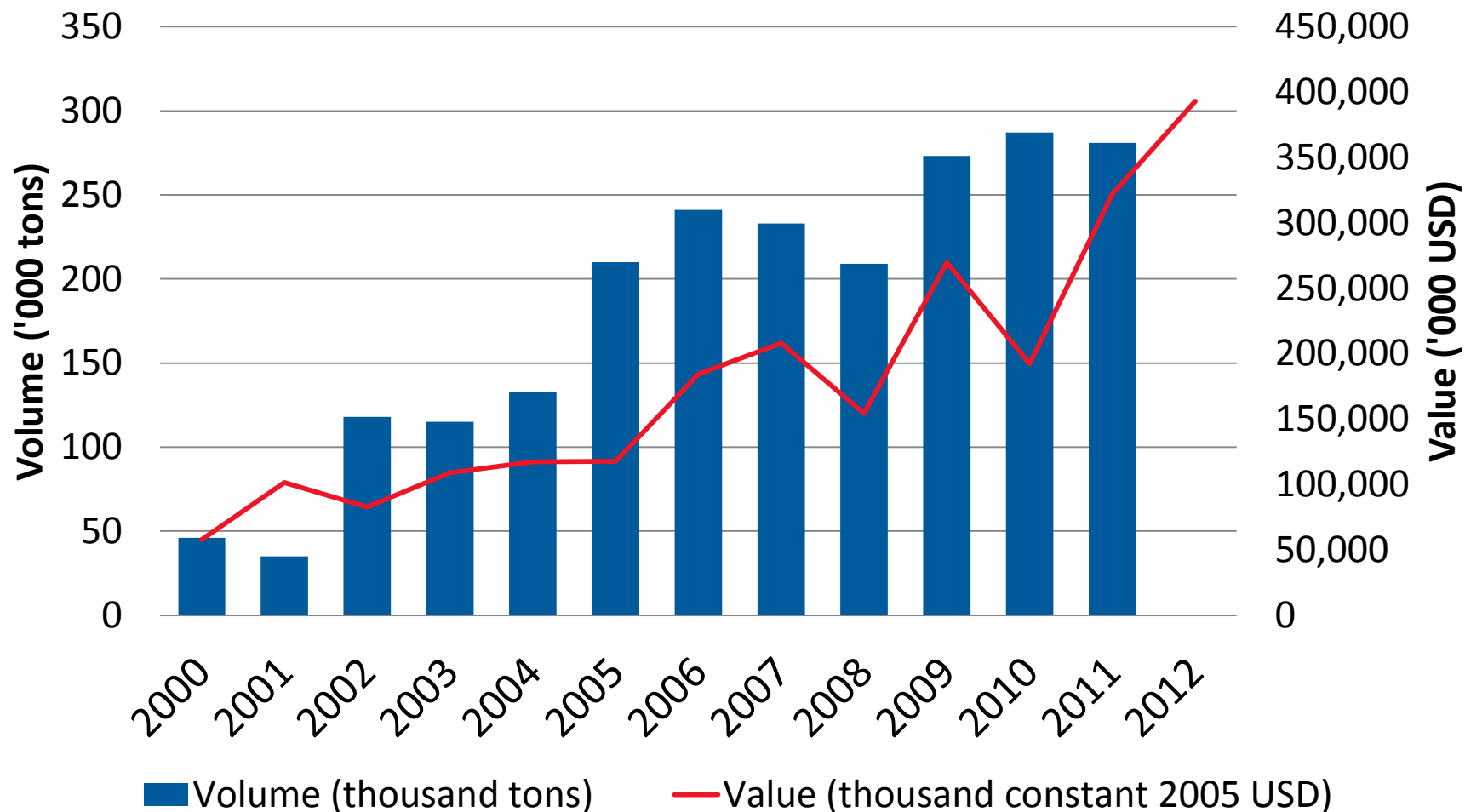
Source: Food Balance Sheet Database, FAO and UN Comtrade Database.

Monthly vegetable export and domestic price index in China (2004-2014)



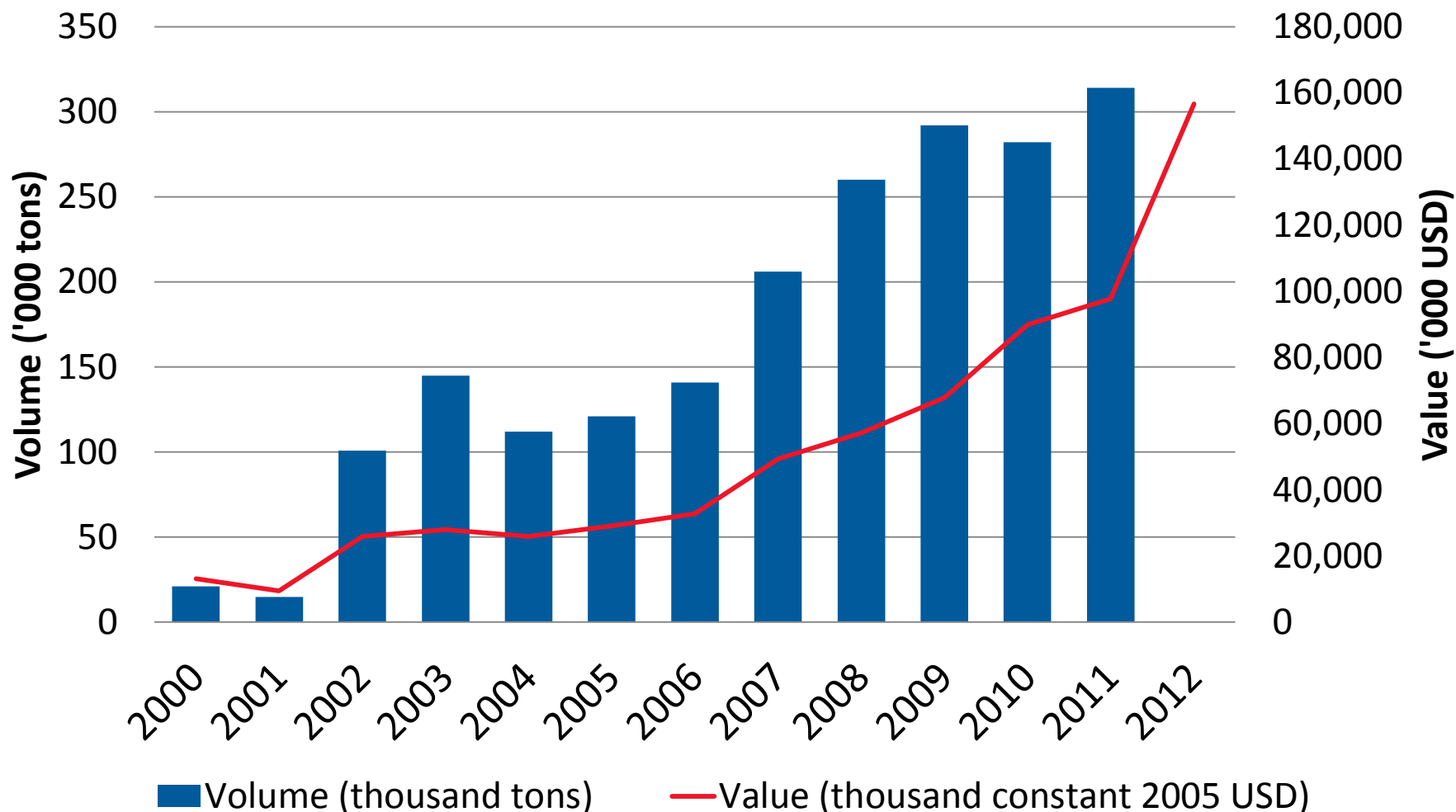
Source: National Bureau of Statistics China

Vietnam: Exports of Vegetables (2000-2012)



Source: Food Balance Sheet Database, FAO and UN Comtrade Database.

Vietnam: Imports of Vegetables (2000-2012)



Source: Food Balance Sheet Database, FAO and UN Comtrade Database.

Vietnam's exports and imports in the Mekong Region (unit: thousand constant 2005 USD)

Year	Exports to			Imports from		
	China	Cambodia	Laos	China	Cambodia	Laos
2000	9,187	168	2,353	13,086	-	-
2001	31,186	973	7,448	6,873	-	-
2002	21,520	1,675	9,829	22,293	-	12
2003	42,819	2,131	7,658	25,567	48	21
2004	44,576	1,840	2,421	22,435	363	3
2005	41,227	1	117	23,779	685	3
2006	119,026	50	50	26,305	1,055	3
2007	148,537	32	18	33,592	8,265	86
2008	83,814	24	72	33,277	12,386	282
2009	202,298	1,150	1,675	44,534	15,004	59
2010	130,441	2,118	4,408	45,759	22,800	237
2011	235,109	1,562	5,238	45,719	35,932	684
2012	295,422	2,150	2,000	49,510	89,131	1,206

Source: UN Comtrade Database. '-' indicates data unavailable.

Key findings of desktop research

- Regional horticulture data quality is a significant issue, particularly at a disaggregate or product specific level
 - Varies substantially depending on the source and the country
 - Particularly poor for Cambodia and Laos
 - Consumption studies are inconsistent or non-existent
 - Trade data is based on formal trade, yet substantial informal trade
 - Difficult to predict supply and demand or understand regional market dynamics
 - Price transmission, integration
 - Seasonal patterns
 - Ability to forecast demand and price is contingent on data
-



Thank you! Questions?

<http://www.adelaide.edu.au/global-food>
<http://www.adelaide.edu.au/global-food/blog/wendy.umberger@adelaide.edu.au>

Morning Discussion Session

3 Key Questions

1. What are the key agricultural trade a) issues and b) opportunities affecting smallholders in this region?
 2. What information is missing or what do we still need to know?
 3. How can we collaborate to add value to existing information?
-

Key Questions for R4D in the Mekong Region

1. What are the consumption patterns, market segments, and drivers of growth of HVAP trade in the region
 2. What are implications of changing patterns, drivers, and growth of HVAP trade?
 - Smallholder opportunities
 - Investment and trade opportunities
-

Key Questions for R4D in the Mekong Region

3. What policy options and investment strategies improve smallholder participation rates in HVAP at regional and country scales and encourage investment?
 4. Are there pro-poor business and value chain models that facilitate inclusive development and encourage investments, growth and trade?
-