

**IDENTIFYING POTENTIAL EXPORT  
OPPORTUNITIES FOR  
SOUTH AFRICAN AGRICULTURE:  
A FOCUS ON EAST ASIA**

by

Ezra Steenkamp

Submitted in partial fulfilment of the requirements for the degree

**Master of Science in Agriculture**

in the

Department of Agricultural Economics, Extension and Rural Development

Faculty of Biological and Agricultural Sciences

University of Pretoria

Pretoria

December 1999

# *Abstract*

## **IDENTIFYING POTENTIAL EXPORT OPPORTUNITIES FOR SOUTH AFRICAN AGRICULTURE: A FOCUS ON EAST ASIA**

by

Ezra Steenkamp

Degree: M.Sc Agric

Department: Agricultural Economics, Extension and Rural Development

Study leader: J.F. Kirsten

This study constitutes one of the first attempts in understanding the importance of the different export destinations and export commodities for the South African agriculture. This knowledge of agricultural trade movements will now make it possible to reprioritise efforts in an agricultural export promotion strategy. The study uses a technique called the growth-share matrix, which maps countries according to their significance in South Africa's current agricultural export picture (share) and the rate at which they are becoming increasingly more or less significant (growth) in South Africa's agricultural trade. An analysis of agricultural export share and growth shows that traditional export products and countries are still important, though declining steadily. Major shifts have taken place over the last decade, but especially after 1993 (post-sanction period). High growth export destinations have grown from a 3½% share to an almost 30% share (1992 to 1996). High growth export products have grown from a 3½% share to a 33% share (1988 to 1996). The European Union's importance as an export destination has systematically diminished. Africa's importance has dramatically increased during the sanction years, but levelled off

after 1993, yet retained a high base. South Africa's greatest export growth opportunities are in countries in Asia and the Americas.

The East Asian markets were explored because dramatic changes occurred in these markets resulting in new opportunities. From a historical trade perspective they were identified to perform well. However, it was especially the future trends that made East Asia an attractive market to study because of the enormous potential growth prospects, policy changes, varying consumption patterns and demographic factors. The fast growth in Asia and globalisation will draw resources away from agriculture in these economies and create agricultural markets as a result of a shift in their comparative advantages. Most of the world's fixed investment is in Asia and over the next two decades 50% of the world-wide growth will occur in Asia. Before 1996 the Asian region accounted for about 70% of the increase in the global consumption of commodities. It is especially the East Asian economies that have experienced sustained rapid growth over the past half century.

Changes in consumption patterns are mainly determined by income changes in the developing countries of East Asia. The rapid industrialisation in these economies, higher incomes and several social trends resulted in a significant shift in diet- and eating habits towards western-style foods, high-quality- and high-protein foods and convenience- and health products. Generally consumer demands are roughly the same everywhere: more convenient- and nutritious foods at a lower cost. The modernisation of the retailing and food-service sectors and the opening of the economy also resulted in new markets. New free-trade agreements in South East Asia and Asia Pacific, the next World Trade Organisation negotiations and reforms in East Asia because of the currency crisis, will accelerate the opening up of these economies.

The need has arisen for South Africa to extend its strategic focus to the non-traditional markets of the East. Relations with these countries providing new markets will stimulate future export potential.

# *Uittreksel*

## **IDENTIFISERING VAN POTENSIËLE UITVOERGELEENTHEDE VIR DIE SUID-AFRIKAANSE LANDBOU: 'N FOKUS OP OOS-ASIË**

deur

Ezra Steenkamp

Graad: M.Sc Agric

Departement: Landbou-ekonomie, Voorligting en Landelike Ontwikkeling

Studieleier: J.F. Kirsten

Hierdie studie is een van die eerste pogings om die belangrikheid van verskillende uitvoerlande en uitvoerprodukte vir die Suid-Afrikaanse landboubedryf te verstaan. Hierdie inligting van landbou handelstendense maak dit moontlik om verdere werk op 'n uitvoerstrategie te prioritiseer. Die studie gebruik 'n tegniek genaamd 'n 'groeï-aandeel' matriks waarvolgens lande gerangskik word volgens hulle belangrikheid in landbou uitvoeraandeel asook die koers waarteen uitvoerbestedings (lande) belangriker of minder belangrik vir Suid-Afrikaanse landbouhandel word. Ontleding van die landbou uitvoeraandeel en die groei van die aandeel het uitgewys dat tradisionele uitvoerprodukte en lande steeds belangrik is, maar dat dit aan die afneem is. Groot veranderinge het plaasgevind oor die laaste dekade, maar veral na 1993 toe sanksies opgehef is. Geselekteerde hoëgroei uitvoerbestedings het gegroei in hulle aandeel van uitvoere van 'n 3½% in 1992 tot ongeveer 'n 30% aandeel in 1996. Geselekteerde hoëgroei uitvoerprodukte het gegroei van 'n 3½% in 1988 tot 'n 33% aandeel in 1996.

Die uitvoeraandeel van die Europese Unie het sistematies afgeneem in belangrikheid. Uitvoere na Afrika se aandeel het dramaties toegeneem gedurende die sanksiejare en 'n

plato bereik op 'n hoë vlak. Suid-Afrika se belowendste geleentheid word gesien in die groeimarkte van Asië en die Amerika's.

Die Oos-Asiatiese lande is nagevors omdat groot veranderinge plaasgevind het in hierdie markte wat gelei het tot nuwe markgeleenthede. Vanuit 'n historiese handelsoogpunt het hierdie lande goed presteer, maar dit was egter toekomstendense wat Oos-Asië 'n aantreklike mark maak. Belangrikste faktore is die groot groeipotensiaal, beleidsveranderinge, veranderinge in verbruikerspatrone en demografiese faktore. Die vinnige groei in Asië en globalisering sal veroorsaak dat hulpbronne onttrek van landbou weens veranderinge in vergelykende voordeel, en wat tot gevolg sal hê dat nuwe markte ontstaan. In die volgende twee dekades sal die meeste van die wêreld se vaste-investering en 50% van die wêreldwye groei in Asië geskied. Tot 1996 was 70% van die toename in wêreldvoedselverbruik in Asië. Veral die Oos-Asiatiese ekonomieë het volgehoue, vinnige groei gehad die afgelope 50 jaar.

Veranderinge in verbruikerspatrone was meestal die gevolg van verbeterde inkomste in ontwikkelende Oos-Asië. Die vinnige industrialisering in hierdie ekonomieë, toenemende inkomste en verskeie sosiale tendense het gelei tot veranderinge in die eetgewoontes na meer westerse voedselsoorte, hoëwaarde- en hoëproteïenvoedsel en gerieflikheids- en gesondheidsprodukte. Oor die algemeen is verbruikersaanvraag oral dieselfde: meer gerief en voedingswaarde teen laer pryse. Modernisering van die kleinhandel en voedseldienssektore en liberalisering het ook nuwe markte laat ontstaan. Nuwe vryhandelsooreenkomste in Suidoos-Asië en die Stille Oseaan, die volgende onderhandelingsronde van die Wêreld Handels Organisasie (WHO) en hervormings in Oos-Asië weens die ruilhandelskrisis sal die liberalisering van hierdie ekonomieë versnel.

Die behoefte het ontstaan vir Suid-Afrika om sy strategiese fokus uit te brei na die nie-tradisionele markte van die Ooste. Verhoudings met hierdie lande sal nuwe markte voorsien, wat toekomstige uitvoerpotensiaal kan verbeter.

# *Table of contents*

Acknowledgements	i
Abstract	ii
Uittreksel	iv
Table of Contents	vi
List of Tables	xiv
List of Figures	xv
<b>CHAPTER 1</b> .....	<b>1</b>
<i>INTRODUCTION</i> .....	<b>1</b>
1.1 BACKGROUND AND MOTIVATION OF STUDY .....	1
1.2 THE RESEARCH PROBLEM .....	5
1.3 AIM AND OBJECTIVES OF THE STUDY .....	7
1.4 METHODOLOGY AND DATA USED .....	8
1.5 OUTLINE .....	9
<b>CHAPTER 2</b> .....	<b>11</b>
<i>HISTORICAL PERSPECTIVE ON SOUTH AFRICAN TRADE</i> .....	<b>11</b>
2.1 INTRODUCTION .....	11
2.2 HISTORICAL OVERVIEW OF THE SOUTH AFRICAN ECONOMY AND TRADE .....	11
2.3 PRIORITIZING SOUTH AFRICA'S EXPORT MARKETS .....	18
2.4 MARKET PRIORITIZATION BY REGION .....	20
2.4.1 Europe .....	20
2.4.2 Asia .....	20
2.4.3 Middle East (including Turkey and Iran) .....	21

2.4.4 Southern Africa.....	22
2.4.5 The Rest of Africa.....	22
2.4.6 North America .....	23
2.4.7 Latin America and the Caribbean .....	23
2.4.8 Oceania .....	24
2.5 INTERPRETING THE FINDINGS .....	24
2.6 DEVELOPING A TRADE-POTENTIAL INDEX FOR SOUTH AFRICA .....	27
2.6.1 Analyzing achievements in trade.....	27
2.6.2 Analyzing trade potential.....	27
2.7 CONCLUSIONS.....	28
<b>CHAPTER 3 .....</b>	<b>33</b>
<b><i>TRENDS IN AGRICULTURAL EXPORTS AND PRIORITIZING AGRICULTURAL EXPORT MARKETS .....</i></b>	<b><i>33</i></b>
3.1 INTRODUCTION .....	33
3.2 TRENDS OF SACU AGRICULTURE EXPORTS .....	34
3.2.1 "Growth in exports" vs "growth in exports share" .....	34
3.2.2 Prioritizing export markets .....	35
3.2.3 Developing regional and world matrices on export performance.....	36
3.2.4 Interpretation of regional and world matrices.....	37
3.3 A DETAILED ANALYSIS OF AGRICULTURAL EXPORTS AND EXPORT DESTINATIONS ..	43
3.3.1 A continental perspective.....	43
3.3.2 A regional perspective .....	45
3.3.3 A country perspective .....	46
3.4 A DETAILED ANALYSIS OF THE WORLD COUNTRY MATRIX .....	47
3.4.1 Categorizing countries based on share and growth results .....	47
3.4.1.1 Category A countries.....	48
3.4.1.2 Category B countries .....	48
3.4.1.3 Category C countries .....	49

3.4.1.4 Category D countries.....	50
3.4.2 Country categories and product indications - continental and regional .....	51
3.4.2.1 Europe .....	51
3.4.2.2 Asia.....	53
Middle East.....	54
Far East Asia .....	54
3.4.2.3 Africa.....	57
Southern Africa .....	57
Rest of Africa .....	58
3.4.2.4 The Americas .....	60
North and Central America .....	60
Latin America and the Caribbean.....	61
3.4.2.5 Oceania.....	62
3.5 SUMMARY AND CONCLUSIONS .....	63
<b>CHAPTER 4 .....</b>	<b>66</b>
<b><i>PRIORITIZING AGRICULTURAL EXPORT COMMODITIES .....</i></b>	<b><i>66</i></b>
4.1 INTRODUCTION .....	66
4.2 ACHIEVEMENTS OF AGRICULTURAL EXPORT COMMODITIES.....	66
4.2.1 Export performance of commodity sections.....	66
4.2.1.1 Prepared foodstuffs (Section IV).....	67
4.2.1.2 Vegetable products (Section II).....	71
4.2.2 Export performance of commodities (2 HS, 4 HS and 6 HS aggregations) .....	73
4.2.2.1 High-performing commodities (generally category A and B) .....	73
4.2.2.2 Middle-range performers (generally category C and D) .....	95
4.3 CONCLUSIONS.....	95

CHAPTER 5 .....	97
<i>IDENTIFYING POTENTIAL EXPORT OPPORTUNITIES FOR SOUTH AFRICAN AGRICULTURAL EXPORTS</i> .....	97
5.1 INTRODUCTION AND GENERAL TRENDS IN EAST-ASIA.....	97
5.2 A SELECTION OF STUDIED COUNTRIES .....	102
5.3 A PROFILE OF AGRICULTURAL EXPORT OPPORTUNITIES TO JAPAN	105
5.3.1 Overview and outlook on Japan's economy .....	105
5.3.2 Agricultural Trade Environment.....	106
5.3.3 Self-sufficiency trends (changing comparative advantages) .....	107
5.3.4 Consumption developments.....	107
5.3.5 Opportunities for food exports.....	109
5.3.5.1 Grain and processed grain products .....	109
5.3.5.2 Meat.....	109
5.3.5.3 Dairy .....	110
5.3.5.4 Horticulture .....	111
5.3.5.5 Beverages .....	113
5.3.5.6 Confectionery .....	115
5.3.5.7 Other products .....	116
5.3.6 Barriers to agricultural trade .....	116
5.3.6.1 Tariff barriers, levies and charges .....	116
5.3.6.2 Non-tariff barriers.....	118
5.4 A PROFILE OF AGRICULTURAL EXPORT OPPORTUNITIES TO SOUTH KOREA.....	120
5.4.1 Overview and outlook of the South Korean economy .....	120
5.4.2. Agricultural Trade Environment .....	122
5.4.3. Self-sufficiency trends in Korean agriculture .....	123
5.4.4. Consumption developments .....	125
5.4.5. Opportunities for food exports to Korea .....	126
5.4.5.1 Grain and processed grain products .....	126
5.4.5.2 Opportunities for meat exports.....	127
5.4.5.3 Dairy .....	129

5.4.5.4 Horticulture .....	129
5.4.5.5 Beverages .....	131
5.4.5.6 Confectionery .....	133
5.4.5.7 Other foods .....	133
5.4.6. Barriers to agricultural trade.....	134
5.4.6.1 Tariff barriers, levies and charges .....	135
5.4.6.2 Non-tariff barriers to trade.....	135
5.5 A PROFILE OF AGRICULTURAL OPPORTUNITIES IN MALAYSIA.....	137
5.5.1. Overview and outlook of the Malaysian economy.....	137
5.5.2. Agricultural Trade Environment .....	138
5.5.3. Self-sufficiency trends (changing comparative advantages).....	139
5.5.4. Consumption developments .....	141
5.5.5. Opportunities for food exports .....	142
5.5.5.1 Grain and processed grain products .....	142
5.5.5.2 Meat.....	142
5.5.5.3 Dairy .....	143
5.5.5.4 Horticulture .....	144
5.5.5.5 Beverages .....	145
5.5.5.6 Confectionery .....	145
5.5.5.7 Other foods.....	146
5.5.6 Barriers to agricultural trade.....	146
5.5.6.1 Tariff barriers, levies and charges .....	146
5.5.6.2 Non-tariff barriers to trade.....	148
5.6 A PROFILE OF AGRICULTURE EXPORT OPPORTUNITIES TO INDONESIA	
.....	149
5.6.1 Overview and outlook of the Indonesia economy.....	149
5.6.2 Agricultural trade environment .....	150
5.6.3 Self-sufficiency trends - changing comparative advantages .....	152
5.6.4 Consumption developments .....	152
5.6.5 Opportunities for food exports .....	154
5.6.5.1 Grain and processed grain products .....	154
5.6.5.2 Meat.....	154

5.6.5.3 Dairy .....	155
5.6.5.4 Horticulture .....	155
5.6.5.5 Beverages .....	155
5.6.5.6 Confectionery .....	157
5.6.5.7 Other foods .....	157
5.6.6 Barriers to agricultural trade.....	158
5.6.6.1 Tariff barriers, levies and charges .....	158
5.6.6.2 Non-tariff barriers to trade.....	158
5.7 A PROFILE OF AGRICULTURAL EXPORT OPPORTUNITIES TO CHINA	162
5.7.1 Overview and outlook of the Chinese economy .....	162
5.7.2 Agricultural Trade Environment .....	164
5.7.3 Self-sufficiency trends (changing comparative advantages) .....	165
5.7.4 Consumption developments .....	167
5.7.5 Opportunities for food exports .....	170
5.7.5.1 Grain, oilseeds and processed grain and oilseed products .....	170
5.7.5.2 Meat.....	171
5.7.5.3 Dairy .....	173
5.7.5.4 Horticulture .....	174
5.7.5.5 Beverages .....	175
5.7.5.6 Confectionery .....	176
5.7.5.7 Other foods and agricultural products .....	177
5.7.6 Barriers to agricultural trade.....	177
5.7.6.1 Tariff barriers, levies and charges .....	177
5.7.6.2 Non-tariff barriers to trade.....	180
5.8 SUMMARY AND CONCLUSION .....	181
5.8.1 Japan.....	183
5.8.2 Korea .....	185
5.8.3 Malaysia .....	186
5.8.4 Indonesia .....	188
5.8.1 China .....	189

<b>CHAPTER 6 .....</b>	<b>193</b>
<b><i>CONCLUSIONS AND RECOMMENDATIONS .....</i></b>	<b>193</b>
6.1 SUMMARY.....	193
6.1.1 Introduction .....	193
6.1.2 A broad historical perspective of the South African economy .....	194
6.1.3 Methodology for analyzing agricultural exports .....	196
6.1.4 Results of the World matrix .....	198
6.1.5 Results of the commodity matrices .....	201
6.1.6 New export opportunities to East-Asia .....	203
6.1.6.1 Japan.....	205
6.1.6.2 Korea .....	207
6.1.6.3 Malaysia .....	208
6.1.6.4 Indonesia .....	210
6.1.6.5 China .....	211
6.2 CONCLUSIONS AND RECOMMENDATIONS .....	213
6.2.1 Actions by Industry.....	215
6.2.2 Actions by government: .....	216
6.2.2.1 Monitoring and Information systems .....	216
6.2.2.2 Assistance programmes.....	217
6.2.2.3 Institutional reforms .....	217
6.2.2.4 Negotiations.....	218
Negotiations on Sanitary and Phytosanitary (SPS) requirements and Non-tariff Barriers (NTB) .....	218
Negotiations on tariffs .....	219
New Free Trade Initiatives .....	220
6.2.2.5 Local tariff reforms .....	221
6.3 RECOMMENDATIONS FOR FURTHER STUDY .....	222

Bibliography .....	223
<b>ANNEX 1</b>	
Product coverage .....	234
<b>ANNEX 2</b>	
Country aggregations .....	235
<b>ANNEX 3</b>	
Product section aggregation .....	241
<b>ANNEX 4</b>	
Product aggregations .....	242
<b>ANNEX 5</b>	
SACU agricultural exports to regions .....	244
<b>ANNEX 6</b>	
SACU agricultural exports to East-Asian countries .....	260
<b>ANNEX 7</b>	
Most favoured nation average applied tariffs for East-Asian countries .....	270
<b>ANNEX 8</b>	
NTM Incidence (non-tariff barriers to trade) for East-Asian countries .....	271

## *List of tables*

<b>Table 2.1</b>	World matrix .....	25
<b>Table 2.2</b>	Trade potential index and ranking .....	31
<b>Table 2.3</b>	Relative attractiveness of export markets by industry classification .....	32
<b>Table 3.1</b>	World continental matrix .....	38
<b>Table 3.2</b>	World regional matrix A .....	39
<b>Table 3.3</b>	World regional matrix B .....	40
<b>Table 3.4</b>	World matrix by individual country .....	41
<b>Table 3.5</b>	Growth in SACU exports 1992 to 1997 .....	42
<b>Table 4.1</b>	Growth in shares of agricultural exports matrix (2 HS code) .....	75
<b>Table 4.2</b>	Growth in SACU exports per products 1992 to 1997 .....	76
<b>Table 4.3</b>	Growth in share of agricultural exports matrix (4 HS code) .....	77
<b>Table 4.4</b>	Growth in share of agricultural exports matrix (6 HS code) .....	78
<b>Table 4.5</b>	Classification according to growth and share performance .....	79
<b>Table 4.6</b>	Classification according to growth and share performance .....	80
<b>Table 4.7</b>	Classification according to growth and share performance .....	81
<b>Table 4.8</b>	Classification according to growth and share performance .....	82
<b>Table 4.9</b>	Classification according to growth and share performance .....	83
<b>Table 4.10</b>	Classification according to growth and share performance .....	84
<b>Table 4.11</b>	High-growth commodities on a 2HS code and further dis-aggregation .....	94
<b>Table 4.12</b>	High-growth commodities on 6HS code which did not perform well on 2HS code aggregation .....	94
<b>Table 5.1</b>	Self-sufficiency ratio's in Korea, 1997 .....	124
<b>Table 5.2</b>	Consumption of food products per person (kg) and self-sufficiency ratio's (%) in Malaysia .....	140
<b>Table 5.3</b>	Meat and poultry consumption (kg/ca) .....	172
<b>Table 5.4</b>	China WTO tariffs (%) on United States goods .....	179
<b>Table 5.5</b>	Summary of current South African exports to Asian countries.....	192

# *List of figures*

Figure 2.1	Real economic growth has re-emerged .....	13
Figure 2.2	The SA Rand depreciated sharply .....	14
Figure 2.3	SACU trade balance .....	14
Figure 2.4	Revival in fixed investment and private consumption.....	16
Figure 2.5	Consumer and producer price inflation considerably reduced .....	16
Figure 3.1	SACU agricultural exports (1988 to 1998) .....	33
Figure 3.2	SACU export growth (1988 to 1998) .....	33
Figure 3.3	Percentage agricultural exports from SACU to different continents .....	35
Figure 3.4	Percentage agricultural exports from SACU to different continents .....	44
Figure 3.4.1	Percentage agricultural exports from SACU to Europe .....	44
Figure 3.4.2	Percentage agricultural exports from SACU to Asia .....	44
Figure 3.4.3	Percentage agricultural exports from SACU to Africa .....	44
Figure 3.4.4	Percentage agricultural exports from SACU to the Americas .....	44
Figure 3.5	SACU agricultural exports (high share, high growth in share) Category A .....	48
Figure 3.6	SACU agricultural exports (high share, high growth in share) Category A .....	48
Figure 3.7	SACU agricultural exports (high share, medium growth in share) Category B .....	49
Figure 3.8	SACU agricultural exports (medium share, high growth in share) Category B .....	49
Figure 3.9	SACU agricultural exports (high share, low growth in share) Category C .....	49
Figure 3.10	SACU agricultural exports (low share, high growth in share) Category C .....	49
Figure 3.11	SACU agricultural exports (high share, negative growth in share) Category C .....	50
Figure 3.12	SACU agricultural exports (medium share, low growth in share) Category D .....	50
Figure 3.13	SACU agricultural exports to Europe (high share, low growth in share) Category C .....	52
Figure 3.14	SACU agricultural exports to Europe (low share, high growth in share) Category C .....	52
Figure 3.15	SACU agricultural exports to Europe (high share, negative growth in share) Category D .....	52
Figure 3.16	SACU agricultural exports to Asia (high share, high growth in share) Category A .....	55
Figure 3.17	SACU agricultural exports to Asia (medium share, high growth in share) Category B...	55
Figure 3.18	SACU agricultural exports to Asia (low share, high growth in share) Category C.....	55
Figure 3.19	SACU agricultural exports to Asia (high and medium share, low and negative growth in share) Category D .....	55
Figure 3.20	SACU agricultural exports to Africa (high and medium share, high and medium growth in share) Category A and B .....	59
Figure 3.21	SACU agricultural exports to Africa (high share and low growth in share, and low share and high growth in share) Category C .....	59
Figure 3.22	SACU agricultural exports to Africa (high share and negative growth in share, and medium share and low growth in share) Category D .....	59
Figure 3.23	SACU agricultural exports to the Americas (low share and high growth in share) Category A and B.....	60
Figure 3.24	SACU agricultural exports to the Americas (low share and high growth in share) Category C .....	60
Figure 3.25	SACU agricultural exports to Oceania .....	62
Figure 4.1	Percentage agricultural exports (section grouping) from SACU.....	68
Figure 4.1.1	Section IV, Prepared foodstuffs .....	68
Figure 4.1.2	Section II, Vegetable products (including grains) .....	68
Figure 4.1.3	Section I, Live animals, animal products .....	68
Figure 4.1.4	Section VIII, Raw hides and skins .....	68
Figure 4.1.5	Section III, Animal or vegetable fats and oils .....	69
Figure 4.1.6	Section XII, Textiles and textile articles .....	69
Figure 4.1.7	Section VI, Products of chemicals .....	69
Figure 4.2	Percentage agricultural exports (section) from SACU to Europe .....	70
Figure 4.3	Percentage agricultural exports (section) from SACU to Asia .....	70

Figure 4.4	Percentage agricultural exports (section) from SACU to Africa .....	70
Figure 4.5	Percentage agricultural exports (section) from SACU to the Americas .....	70
Figure 4.6	SACU agricultural exports (1992 to 1996) .....	72
Figure 4.7	Percentage agricultural exports (2 tariff code) from SACU (high share and high growth in share). Category A .....	85
Figure 4.8	Percentage agricultural exports (2 tariff code) from SACU (high growth and medium growth in share). Category B .....	85
Figure 4.9	Percentage agricultural exports (2 tariff code) from SACU (high share and medium growth in share). Category B .....	85
Figure 4.10	Percentage agricultural exports (2 tariff code) from SACU (medium share and medium growth in share, and high share and low growth in share). Category C .....	85
Figure 4.11	Percentage agricultural exports (2 tariff code) from SACU (high share and negative growth in share, and medium share and low growth in share) Category D.....	86
Figure 4.11.1	Percentage agricultural (2 tariff code) from SACU (high share and low growth in share). Category D .....	86
Figure 4.12	Percentage agricultural exports (2 tariff code) from SACU (medium share and low growth in share). Category E .....	86
Figure 4.13	Percentage agricultural exports (2 tariff code) from SACU (medium share and negative growth in share). Category E .....	86
Figure 4.14	Agricultural exports (4 tariff code) from SACU (high share and high growth in share). Category A .....	87
Figure 4.14.1	Exports of Maize (corn) (tariff code 1005) (high share and high growth in share). Category A .....	87
Figure 4.14.2	Exports of cane or beet sugar (tariff code 1701) (high share and high growth in share). Category A .....	87
Figure 4.14.3	Exports of wine of fresh grapes (tariff code 2204) (high share and high growth in share). Category A .....	87
Figure 4.14.4	Exports of undenatured ethyl alcohol (tariff code 2207) (high share and high growth in share). Category A .....	87
Figure 4.15	Percentage agricultural exports (4 tariff code) from SACU (high share and medium growth in share and medium share and high growth in share). Category B .....	88
Figure 4.15.1	Exports of wheat or meslin flour (tariff code 1101) (high share and medium growth in share) .....	88
Figure 4.15.2	Exports on onions, shallots and garlic (tariff code 0703) (high share and high growth in share).....	88
Figure 4.15.3	Exports of sugars, cheroots (tariff code 2402) (medium share and high growth in share)	88
Figure 4.15.4	Exports of chocolate and other (tariff code 1806) (medium share and high growth in share) .....	88
Figure 4.15.5	Exports of cereal groats, meal (tariff code 1103) (medium share and high growth in share) .....	89
Figure 4.16	Percentage agricultural exports (4 tariff code) from SACU (high share and low growth in share, medium share and medium growth in share and low share and high growth in share). Category C .....	90
Figure 4.16.1	Percentage agricultural exports (4 tariff code) from SACU. Category C .....	90
Figure 4.16.2	Exports of raw hides and skins (tariff code 0402) (high share and low growth in share) Category C .....	91
Figure 4.16.3	Exports of beer made from malt (tariff code 2203) (high share and low growth in share). Category C .....	91
Figure 4.16.4	Exports of condensed milk and cream (tariff code 0402) (medium share and medium growth in share). Category C .....	91
Figure 4.16.5	Exports of sunflower (tariff code 1512) (medium share and medium growth in share). Category C .....	91
Figure 4.16.6	Exports of melons (tariff code 0807) (low share and high growth in share). Category C	91
Figure 4.16.7	Exports of molasses (tariff code 1703) (low share and high growth in share). Category C .....	91
Figure 4.17	Percentage agricultural exports (4 tariff code) from SACU (high share and negative growth in share, medium share and low growth in share and low growth and medium	

	growth in share). Category D .....	92
Figure 4.17.1	Exports of citrus fruit (tariff code 0805). Category D .....	92
Figure 4.17.2	Exports of apples, pears (tariff code 0808). Category D .....	92
Figure 4.17.3	Exports of fruit, nuts (tariff code 2008). Category D .....	92
Figure 4.17.4	Exports of grapes (tariff code 0806). Category D .....	92
Figure 4.17.5	Exports of wool (tariff code 5101). Category D .....	93
Figure 4.17.6	Exports of meat of bovine (tariff code 0201). Category D .....	93
Figure 4.17.7	Exports of groundnuts (tariff code 1202). Category D .....	93
Figure 4.17.8	Exports of fine or coarse animal hair (tariff code 5102). Category D .....	93
Figure 4.17.9	Exports of unmanufactured tobacco (tariff code 2401). Category D .....	93
Figure 4.17.9	Exports of meat and edible offal (tariff code 0207). Category D .....	93
Figure 5.1	Recent distribution of the studied countries relative to phases in food consumption .....	99
Figure 5.2	Malaysian import tariffs .....	147
Figure 5.3	Indonesian import tariffs .....	159