

## **Malaysia's agricultural trade in the post-WTO era** (Perdagangan produk pertanian Malaysia dalam era pasca WTO)

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Key words: World Trade Organization, agricultural trade, Balance of Trade

### **Abstract**

This paper analyzed Malaysia's trade in agricultural products for the 1985–2004 period. Comparative analysis between two periods, 1985–1995 and 1996–2004 was used in evaluating the effects of the trade liberalization initiatives of the World Trade Organization (WTO) and ASEAN on Malaysia's agricultural trade. Results of the analysis showed no distinct differences in the pattern and composition of products traded between the two periods. The effect on the overall balance of agricultural trade was positive with the Balance of Trade (BOT) increasing by almost 2 folds between the periods. However, this increase in surplus was attributed to increase in the exports of vegetable oils in which the significant component was palm oil. Malaysia's BOT in the other product categories was worse off. The paper concluded that more likely than not, the enhancement in the international trade of agricultural products for Malaysia resulted from a combination of "traditional" pull and supply-push economic factors such as rising incomes, changing tastes and preferences, increase in population as well as technological advancements rather than trade liberalization per se.

### **Introduction**

In the early decades that followed after World War II, it was observed that countries that practised outward looking policies seemed to be experiencing better economic growth relative to those that practised inwards looking policies. Relatively more open economies in Asia such as the Republic of Korea, Taiwan, Malaysia, Singapore, Hong Kong and Thailand performed better than less-open economies like Burma, China, India, Vietnam and Cambodia. The years that followed after the Cold War saw the international community increasingly focusing their initiatives in trade and commerce, propagating the idea of freer trade world-wide, that freer trade is the answer to better economic growth, better incomes and higher standards of living. The proponents of free trade also lobbied both developed and

developing countries that all would benefit from freer agricultural trade as well as the notion that trade liberalization of agricultural products would enhance food, livelihood and income security for the poor of the world.

Subsequently, under the auspices of the General Agreement on Tariffs and Trade (GATT), the United States of America and other major world agricultural exporters initiated a new round of multilateral trade negotiations, called the Uruguay Round (UR) in 1986 where agricultural trade became its main agenda. Eager for the potential economic benefits that could be gained from a more liberalized international trading environment, governments from all over welcomed this new initiative to work out a freer trading system.

In 1995, the Uruguay Round Agreement was signed leading to the formation of the

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WTO which replaced GATT. Concurrently, during the years leading to the formation of the WTO, further initiatives for freer trade gained momentum as countries within a region entered into trade pacts and formed free trade and investment areas to exploit economic complementarities among them and enjoy the benefits that freer trade had to offer. Such initiatives include the formation of the North American Free Trade Area (NAFTA), Central America Free Trade Area (CAFTA), Asia Pacific Economic Cooperation (APEC) and ASEAN Free Trade Area (AFTA). Now the establishment of free trade areas (FTAs) is not only confined to countries within a geographical region and among neighbours, but has extended far beyond regional boundaries. It is now not uncommon to hear of “bi-country” FTAs from distant regions, for example the FTA between the U.S.A. and Singapore.

Being a trading nation that believes and practices an open market system, Malaysia is also a strong proponent of freer trade. Malaysia is a founding member of the WTO and is also a signatory to the Common Effective Preferential Tariff (CEPT) of AFTA as well as a member of APEC. It is also a member of the Cairns Group (CG), a grouping of agricultural exporters formed during the UR Round that calls for the elimination of all forms “distorted support” to the agricultural sector. The CG also played a prominent role in getting agriculture into the Multilateral Trade Talks in the UR Round. The question now is that, how has Malaysia fared in its agricultural trade under this environment of increasingly liberalized trade brought about by the WTO, AFTA and other free trade initiatives? This article will attempt to answer this question. Specifically, the objective of this paper is to review, examine and assess the developments and performance of Malaysia's international trade in agriculture over the last two and the half decades or so.

### **Elements of the free trade initiatives**

For this paper, two trade liberalization agreements are discussed namely the

Agreement on Agriculture (AoA) of the WTO and the CEPT of AFTA. There are other FTAs that Malaysia is party to but these are the two trade agreements which are more extensive in nature compared to the bilateral FTAs. Additionally, under APEC in which Malaysia is a member, countries are required only to undertake voluntary tariff cuts on sectors that they are willing to liberalized.

### ***The AoA of the WTO***

Under the AoA, members agreed to undertake reform in the three pillars of market access, export subsidies and domestic support. This section briefly describes the main elements of the reforms required in the three respective pillars.

**Market access** In market access, members agreed for all non-tariff border measures to be converted into tariffs. These tariffs together with existing tariffs were to be reduced by an average of 24% over 10 years with a minimum reduction of 10% per tariff line for developing countries while developed countries were to reduce them by an average of 36% and a minimum of 15% per tariff line over six years. Least-developed countries were not required to reduce their tariffs. Countries were also required to open up minimum market access of up to 5% of domestic consumption of products previously covered under import bans due to national sensitivities.

**Export subsidies** For export subsidies, developing countries are required to reduce the volume on subsidized exports and expenditures of subsidies by 14% and 24% respectively over 10 years while developed countries have to do so by 21% and 36% respectively over six years. No new export subsidies are allowed.

**Domestic support** The AoA is distinguished between two categories of domestic support i.e. support with no or minimal distortive effects on trade and support with trade-distorting effects. For example, government support on R&D is considered to have no or at

most minimal trade distorting effects (*Green Box* support measures) while government support in buying products at guaranteed prices were considered trade distorting (*Amber Box* support measures). The aggregate trade distorting support in monetary terms is called the Aggregate Measure of Support (AMS) and this AMS, with certain exceptions, is subjected to reduction commitments.

Developing countries were committed to reduce their AMS by 13.3% in 10 years while developed countries were to reduce the AMS by 20% in 6 years. Another form of support that was excluded from reduction commitments is direct payments under production limiting programmes (*Blue Box* support measures). This exclusion was on condition that such payments were made on fixed areas and yield or a fixed number of livestock.

#### ***The CEPT of AFTA***

The CEPT of AFTA was signed by the Economic Ministers of ASEAN in 1992. Basically, this Agreement requires member countries of ASEAN to reduce import tariffs on all products (except those covered by general exceptions) to the 0–5% range within a specified time period, depending on the category of products declared by members. Quantitative restrictions (QRs) were also to be dismantled. Agricultural products were not originally covered under the agreement. However, in 1994, member governments decided to include agricultural products [termed as unprocessed agricultural products (UAPs) under the Agreement] in the agreement.

Under the scheme worked out for agriculture in the CEPT Agreement, agricultural products [termed as unprocessed agricultural products (UAPs) under the Agreement] were categorized into four major lists: immediate inclusion list, temporary exclusion list, sensitive list and highly sensitive list. All products except those in the sensitive (SL) and highly sensitive lists (HSL) were to have their tariffs reduced to 0–5% by 2003

while those in the SL and the HSL by 2010. HSL, which was only assigned to paddy, was given further flexibility of having an ending tariff of 20%.

#### **General assessment of the WTO and AFTA**

It is known that the agricultural sector is the most protected sector in most economies and is considered as sensitive to governments all over the world. This explains why the Multilateral Trade Negotiations (MTNs) under GATT included agriculture only in the UR Round in 1986, after eight rounds of trade talks. Many developed and wealthy economies such as the United States of America (U.S.A.) and the European Union (EU) supported their agriculture through instruments of domestic support and various forms of exports' subsidization.

Despite the commitments to cut "distortive support" (AMS), developed countries such as the EU and the U.S.A. were still able to maintain high levels of current support. This is because in the WTO, members are only required to cut from "bound" levels and not applied or current levels. These bound levels were set by member countries for the AoA. Members can thus increase their applied levels as long as they are within the bound levels that were set in the agreement. The difference between the bound and the actual or applied is termed as "water". For the U.S.A., actual levels of AMS support actually increased instead of decreased during the UR implementation period. The level of actual AMS support in 1996 for the U.S.A amounted about US\$6 billion. This went up to US\$16 billion in year 2000 (the final year of implementation of the UR Agreement for developed countries). For the EU, although the level of AMS was reduced by about €18 billion for the same time period, its current AMS support at about €44 billion was still extremely high. *Table 1* shows the level of agricultural assistance that is still currently in place in selected OECD countries. Total producer support in the OECD economies still amounted to a massive US\$318.3 billion, which was calculated to be at the rate of more

Table 1. Level of agricultural assistance in selected OECD economies

Selected OECD economies	Producer Support Estimate (PSE) (US\$ billion)	Share of PSE in farm income (%)	Producer Support per farmer (US\$1,000)
Australia	1.2	4	3
Canada	6.0	20	11
EU	112.6	36	17
Japan	55.7	59	21
Korea	21.0	66	23
New Zealand	0.2	1	1
Norway	2.9	71	45
Switzerland	5.5	75	32
United States	90.3	18	16
OECD	318.3	31	11

Source: OECD (2003)

than US\$870 million a day. The share of producer income support (PSE) in farmers' income was as high as 75% for Switzerland. PSE support per farmer was highest in Norway followed by Switzerland and Korea. As such, the "level playing field" that was much talked about in the Uruguay Round did not very much materialize.

On the other hand, developing economies with not much money to directly support their farmers mainly depended on borders measures to protect their local agriculture. This is also true for the ASEAN economies. As such the effectiveness of the trade liberalization measures in enhancing trade among developing countries depends on reforms undertaken in the area of market access. However, the same tariff cutting approach as in domestic support was also applied to tariff reduction. *Table 2* shows the simple average tariff structure for selected WTO member countries. It can be seen that in many cases, the final bound average tariffs of most countries are higher than the current applied tariffs. This means to show that it was unlikely that real market access created as a result of reduction in most favoured nation (MFN) tariffs under the UR Round took place. However, new market opportunities were, nevertheless created. This was mainly through the minimum market access provisions where products that were previously under imports bans need to be opened by 3–5% of domestic consumption.

For AFTA, member countries placed their protective industries in the SL and HSL. Most of the products under the lists would only be liberalized by 2010. Most likely it would be only after year 2010 that significant effects could be observed. Tengku Ariff and Engku Elini (2004) found that ASEAN trade expanded by more than 42% between the pre (1991–1995) and post AFTA (1996–2000). However, the share of intra ASEAN trade to the group's total trade only marginally increased from about 16% to just about 17%. This provides indications that, in general, although AFTA did enhance intra ASEAN trade, thus far, it was not sufficient to alter the group's overall trade pattern.

#### **Analyses of Malaysia's trade in agricultural products**

From the assessments made in the above section, it appeared that both the AoA and AFTA would only make small differences in real competitive international trade for many countries including Malaysia. Nevertheless, while a number of analysts shared this view, there were many who were of the opinion that liberalization initiatives did make a difference. Taylor and Fairchild (2000) attributed that changes in trade policies resulting from the AoA and regional preferential trading arrangements as one of the factors that contributed to the growth in world trade in fruits and other horticultural products. Other

Table 2. Final bound and applied tariffs for agricultural products of selected OECD and ASEAN countries

Country	Simple average final bound tariff	Simple average applied tariff	% lines applied duty free	Max Advalorem
<b>OECD</b>				
Korea	52.9	42.9	1.7	897
Japan	6.9	7.3	29.2	50
New Zealand	5.7	1.7	60.0	7
USA	6.9	5.1	26.2	350
EU	5.8	5.9	25.9	75
<b>ASEAN</b>				
Brunei D.S.	23.2	0.0	99.7	30
Cambodia	n.a.	19.7	3.3	50
Indonesia	47.0	8.2	10.4	17
Malaysia	12.2	2.1	66	30
Myanmar	n.a.	8.5	6.6	40
Philippines	34.7	8.0	0.0	50
Thailand	35.5	29.0	7.9	65
Singapore	9.5	0.0	99.7	0

Source: WTO (2006)

factors include increasing consumer demand due to strong economic growth, technological innovations especially in the areas of postharvest handling and storage, transportation and communication that had provided the driving force growth in international trade in perishables as well as the globalization of supply chain through strategic alliances and joint ventures, which has improved supply chain management stimulating growth in international trade. Malaysia's post-WTO and AFTA trade performance would also most likely be influenced by this combination of factors.

The analyses undertaken in this section comprised of observation in trends in Malaysian agricultural trade for the period 1985 to 2004. A simple comparative analysis was made to indicate the trends and levels of trade that took place before and after WTO and AFTA came into force. For this purpose, the periods were divided into two, pre-WTO and AFTA (1985–1995) and post-WTO and AFTA (1996–2004).

#### ***Exports of agricultural products***

Malaysia's agricultural exports expanded from US\$2.8 billion to US\$11.7 billion from

1985–2004, registering an impressive growth of more than 7.4% per annum (*Table 3*). However, export growth slowed down to 4.7% per annum from 10.4% per annum during the later decade after the liberalization initiatives. Nevertheless, average exports increased by almost 1.9 times between the periods. Based on the average exports between the two periods, it appears that liberalization in agriculture favoured products like, tobacco and tobacco manufactures (859%), chemical materials and products (328%), animal oils and fats (318%), beverages (266%), essential oils and perfumery (200%), miscellaneous edible products and preparations (189%), cereals and cereal preparations (150%), animal and vegetable oils, processed (112%) and medicinal and pharmaceutical products (112%).

#### ***Imports of agricultural products***

Overall, imports grew almost at the same rate as exports. Total imports increased from about US\$2.0 billion in 1985 to about US\$8.3 billion in 2004 registering a growth of 7.6% for the 1985–2004 period (*Table 4*). The product categories that recorded high import growth includes fixed vegetable oils and fats (16.8%),

Table 3. Malaysia's exports of agricultural products, 1985–2004 (US\$ million)

Description	1985	1995	1996	2004	Average 1985–1995	Average 1996–2004	Changes (%) 1985–2004	AGR* (%) 1985–1995	AGR* (%) 1996–2004	AGR* (%) 1985–2004
Live animals	24.7	220.3	244.0	82.0	130.7	137.0	5	21.9	-13.6	6.3
Meat and meat preparations	5.7	28.3	33.5	33.0	15.6	27.5	77	16.0	-0.2	9.2
Dairy products and birds' eggs	17.2	98.0	109.3	150.5	57.4	112.4	96	17.4	4.0	11.4
Fish, crustac., molluscs and prepn.	102.1	328.9	320.1	567.1	230.2	364.4	58	11.7	7.1	9.0
Cereals and cereal preparations	33.2	143.0	154.9	200.9	62.1	155.5	150	14.6	3.3	9.5
Vegetables & fruits	91.8	197.8	206.4	248.8	149.3	212.1	42	7.7	2.3	5.2
Sugars, sugar prepn. and honey	19.5	80.4	84.7	116.1	69.6	96.7	39	14.2	3.9	9.4
Coffee, tea, spices, etc. and manuf.	295.1	311.5	313.3	575.6	332.8	368.2	11	0.5	7.6	3.5
Feedingstuff for animals	61.5	130.1	164.7	150.4	97.8	124.2	27	7.5	-1.1	4.7
Misc. edible products and prepn.	38.4	262.7	246.4	511.1	110.3	318.7	189	19.2	9.1	13.6
Beverages	9.7	89.4	95.4	206.6	33.6	123.2	266	22.2	9.7	16.1
Tobacco and tobacco manufactures	0.9	69.2	133.9	224.7	20.0	191.9	859	43.6	6.5	29.1
Oil seeds and oleaginous fruits	18.8	10.3	10.7	12.0	14.8	12.7	-14	-6.1	1.5	-2.4
Pulp and waste paper	0.5	11.1	2.4	2.7	3.2	1.6	-49	31.4	1.4	9.2
Textile fibres and their waster	28.8	141.8	159.0	98.4	79.2	102.0	29	15.9	-6.0	6.5
Crude animals and veg. mat. nes.	8.0	35.3	42.2	59.6	26.5	42.2	59	14.8	4.3	10.5
Animal oils and fats	0.0	0.2	7.9	0.3	0.3	1.3	318	36.6	-41.0	22.3

(cont.)

Table 3. (Cont.)

Description	1985	1995	1996	2004	Average 1985–1995	Average 1996–2004	Changes (%) 1985–2004	AGR* (%) 1985–1995	AGR* (%) 1996–2004	AGR* (%) 1985–2004
Fixed vegetable oils and fats	1,916.7	3,947.4	3,702.8	5,353.3	2,124.4	3,938.2	85	7.2	4.6	5.4
Animal and veg. oils, processed	92.5	1,091.3	988.8	1,627.2	464.8	986.3	112	24.7	6.2	15.1
Medicinal, pharmaceutical prod.	17.8	80.2	84.2	131.1	41.0	87.0	112	15.1	5.5	10.5
Essential oils, perfumery, etc.	20.0	193.4	207.5	423.0	91.3	273.7	200	22.7	8.9	16.1
Chemical mat. and products, nes.	44.1	602.6	708.3	947.4	155.5	664.8	328	26.1	3.6	16.1
Grand total	2,847.0	8,073.3	8,020.6	11,722.0	4,310.4	8,341.6	94	10.4	4.7	7.4

Source: UN Comtrade (2006)

\*AGR = Average Growth Rate

animal and processed vegetable oils (14.4%), pulp and waste paper (15.3%), coffee, tea and spices (11.3%), essential oils and perfumery (9.3%), chemical materials and products (9.3%) and medicinal and pharmaceutical products (8.6%). From this, it was observed that there were a number of similar product categories where both imports and exports experienced high growth. For a few product categories such as animal and processed vegetable oils and chemical materials and product, nes., average imports between the two periods swelled by at least 300%.

### Balance of Trade

Malaysia's Balance of Trade (BOT) in agricultural products grew at a steady rate of 7.1% over the 1985–2004 period, from about US\$892 million to US\$3,457 million. For most product categories with the exception of live animals, miscellaneous edible products and preparation, beverages, tobacco, fixed vegetable oils and fats, processed animal and vegetable oils and other chemical materials and products, all other product categories were worse off in the post-WTO/AFTA period (Table 5). This means that out of the 22 product categories only 6 product categories exhibited positive BOT development. Although Malaysia's overall total BOT for agriculture showed an improvement of 2 times, the deterioration of specific product category BOT averages during the post-WTO/AFTA period clearly showed that the country was still depending on very narrow range of products for its agricultural trade surpluses. On closer examination, it can be seen that only two product categories contributed significantly to the surpluses, namely fixed vegetable oils and fats, processed animal and vegetable oils, clearly pointing to the dominance of palm oil in contributing to this positive BOT.

### Conclusion

In general, the analysis conducted in this paper was unable to show clear evidences of the effects of the multilateral and regional free initiatives to Malaysia's trade in agricultural products. Although the overall BOT effects

Table 4. Malaysia's imports of agricultural products, 1985–2004 (US\$ million)

Description	1985	1995	1996	2004	Average 1985–1995	Average 1996–2004	Changes (%) 1985–2004	AGR* (%) 1985–1995	AGR* (%) 1996–2004	AGR (%) 1985–2004
Live animals	16.1	55.9	52.9	56.9	27.4	52.8	92	12.5	0.9	6.6
Meat and meat preparations	75.2	152.1	184.3	253.6	95.8	200.8	110	7.0	4.0	6.4
Dairy products and birds' eggs	100.7	379.6	390.6	411.4	208.9	334.6	60	13.3	0.6	7.4
Fish, crustac., molluscs and prepn.	100.1	307.2	331.4	518.2	180.0	327.2	82	11.2	5.6	8.7
Cereals and cereal preparations	404.0	815.7	1,003.7	926.4	505.2	790.7	57	7.0	-1.0	4.4
Vegetables and fruits	220.8	449.6	504.4	572.5	272.7	463.2	70	7.1	1.6	5.0
Sugars, sugar prepn. and honey	137.5	341.1	347.6	311.2	214.9	310.3	44	9.1	-1.4	4.3
Coffee, tea, spices, etc. and manuf.	62.9	163.0	152.1	540.9	74.2	267.0	260	9.5	15.9	11.3
Feedingstuff for animals	83.5	232.3	337.1	379.9	139.9	287.3	105	10.2	1.5	8.0
Misc. edible products and prepn.	67.9	246.5	307.4	404.7	135.6	295.4	118	12.9	3.4	9.4
Beverages	45.5	106.2	103.8	159.0	63.1	85.9	36	8.5	5.3	6.6
Tobacco and tobacco manufactures	49.2	114.9	93.8	200.7	61.8	152.4	147	8.5	9.5	7.4
Oil seeds and oleaginous fruits	75.6	165.9	172.3	285.8	127.8	202.6	58	7.9	6.3	7.0
Pulp and waste paper	5.3	45.7	46.7	97.4	23.3	64.1	176	21.5	9.2	15.3
Textile fibres and their waster	66.2	350.6	414.3	254.2	172.4	269.9	57	16.7	-6.1	7.1
Crude animals and veg. mat. nes.	46.3	101.5	113.0	86.7	63.3	83.9	33	7.9	-3.3	3.3
Animal oils and fats	1.4	3.8	3.4	6.8	1.5	3.2	114	10.1	8.6	8.4

(cont)

Table 4. (Cont.)

Description	1985	1995	1996	2004	Average 1985-1995	Average 1996-2004	Changes (%) 1985-2004	AGR* (%) 1985-1995	AGR* (%) 1996-2004	AGR (%) 1985-2004
Fixed vegetable oils and fats	28.8	132.8	88.9	705.7	103.0	260.1	153	15.3	25.9	16.8
Animal and veg. oils, processed	3.2	14.8	16.4	49.0	6.0	30.6	413	15.4	13.7	14.4
Medicinal, pharmaceutical prod.	118.1	318.5	333.0	602.5	191.1	394.7	106	9.9	7.4	8.6
Essential oils, perfumery, etc.	94.4	345.3	368.4	551.7	187.5	386.6	106	13.0	5.0	9.3
Chemical mat. and products, nes.	152.6	593.4	617.7	889.6	303.8	120	328	13.6	4.6	9.3
Grand total	1,955.1	5,436.7	5,983.2	8,265.1	3,159.1	5,932.9	88	10.2	4.0	7.6

Source: UN Comtrade (2006)

\*AGR = Average Growth Rate

for Malaysia were positive, most product categories were worse off in terms of the BOT during the post liberalization era as compared to the period before. Malaysia's continued dependence on its palm oil was again proven in this analysis.

More likely than not, the enhancement in the international trade of agricultural products for Malaysia resulted from a combination of "traditional" pull and supply-push economic factors such as rising incomes, changing tastes and preferences, increase in population as well as technological advancements rather than trade liberalization per se. It seemed that the trade liberalization agreements in agriculture were still not sufficiently substantive to effect changes in factor and output prices that could lead to specialization within the ASEAN region in agriculture. This was indicated by more or less the same pattern of product traded during the pre and post liberalization era without clear evidences of changes in product portfolios in Malaysia's trade regime. Further in-depth research needs to be undertaken to ascertain quantitatively the actual effects of these trade liberalization measures.

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Table 5. Malaysia's Balance of Trade (BOT) in agricultural products, 1985–2004 (US\$ million)

Description	1985	1995	1996	2004	Average 1985–1995	Average 1996–2004	BOT Development*
Live animals	8.6	164.4	191.1	25.1	103.3	84.3	0.8
Meat and meat preparations	-69.4	-123.7	-150.7	-220.6	-80.2	-162.6	-2.0
Dairy products and birds' eggs	-83.4	-281.6	-281.3	-260.9	-151.5	-224.5	-1.5
Fish, crustac., molluscs and prepn.	2.0	21.6	-11.3	48.9	50.2	34.1	0.7
Cereals and cereal preparations	-370.7	-672.7	-848.8	-725.5	-443.0	-629.3	-1.4
Vegetables and fruits	-128.9	-251.8	-298.0	-323.6	-123.5	-243.1	-2.0
Sugars, sugar prepn. and honey	-118.1	-260.7	-262.9	-195.2	-145.3	-220.9	-1.5
Coffee, tea, spices, etc. and manuf.	232.2	148.5	161.2	34.7	258.7	113.9	0.4
Feeding stuff for animals	-22.0	-102.3	-172.4	-229.5	-42.1	-148.9	-3.5
Misc. edible products and prepn.	-29.5	16.2	-61.0	106.3	-25.2	13.2	1.5
Beverages	-35.8	-16.8	-8.4	47.6	-29.5	30.2	2.0
Tobacco and tobacco manufactures	-48.4	-45.7	40.1	24.0	-41.8	31.7	1.8
Oil seeds and oleaginous fruits	-56.7	-155.6	-161.6	-273.8	-113.0	-176.7	-1.6
Pulp and waste paper	-4.8	-34.6	-44.2	-94.6	-20.1	-55.8	-2.8
Textile fibres and their waster	-37.3	-208.8	-255.3	-155.8	-93.2	-173.8	-1.9
Crude animals and veg. mat. nes.	-38.2	-66.2	-70.8	-27.1	-36.9	-46.1	-1.2
Animal oils and fats	-1.4	-3.7	4.5	-6.5	-1.2	-1.6	-1.3
Fixed vegetables oils and fats	1,887.9	3,814.6	3,613.9	4,647.7	2,021.4	3,585.6	1.8
Animal and veg. oils, processed	89.3	1,076.4	972.4	1,578.2	458.8	900.0	2.0
Medicinal, pharmaceutical prod.	-100.3	-238.3	-248.8	-471.4	-150.1	-281.7	-1.9
Essential oils, perfumery, etc.	-74.4	-151.9	-160.9	-128.8	-96.2	-115.5	-1.2
Chemical mat. and products, nes.	-108.5	9.2	90.6	57.8	-148.3	-10.2	1.9
Grand total	891.9	2,636.6	2,037.4	3,456.9	1,151.3	2,317.6	2.0

Source: UN Comtrade (2006)

\*>1 indicates that BOT has increased  
 <1 indicates that BOT has decreased  
 =1 indicates that BOT remains unchanged

UN Comtrade (2006). <http://unstats.un.org/unsd/comtrade>  
WTO (2006). World Trade Organization.  
[http://www.wto.org/english/info\\_e](http://www.wto.org/english/info_e)

### **Abstrak**

Kertas ini menganalisis perdagangan produk pertanian Malaysia bagi jangka masa 1985–2004. Analisis bandingan dijalankan di antara dua jangka masa, 1985–1995 dan 1996–2004 bagi menilai kesan liberalisasi pertanian di peringkat WTO dan ASEAN terhadap perdagangan antarabangsa pertanian Malaysia. Keputusan analisis menunjukkan tiada perbezaan yang ketara dalam pola and komposisi perdagangan pertanian Malaysia di antara dua jangka masa tersebut. Lebihan imbangan purata dagangan pertanian Malaysia meningkat hampir 2 kali di antara dua jangka masa tersebut. Walau bagaimanapun lebihan ini adalah berpunca daripada peningkatan eksport kategori produk minyak sayuran yang kebanyakannya terdiri daripada minyak sawit. Imbangan dagangan untuk kategori produk yang lain menunjukkan perkembangan negatif. Kertas ini merumuskan bahawa kemajuan perdagangan antarabangsa produk pertanian Malaysia lebih dipengaruhi oleh faktor-faktor tradisional tarikan pasaran dan tolakan penawaran seperti kenaikan pendapatan dan penduduk, peralihan cita rasa pengguna dan kemajuan teknologi dan bukan kerana liberalisasi perdagangan semata-mata.