

## **Transformation and economic growth of the Malaysian agricultural sector**

(Tranformasi dan pertumbuhan ekonomi sektor pertanian Malaysia)

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Keywords: revitalize, trade liberalization, globalization, competitiveness, productivity, growth and strategies

### **Abstract**

This paper evaluates the efforts by the Government of Malaysia to revitalize and transform the agricultural sector to be a major engine of growth for the economy. The analyses conducted pointed to a fairly favourable outcome considering the encouraging growth that was achieved in Eighth Malaysia Plan (2001–2005). Agricultural growth during the period was at 3.0%, which was 2.5 times higher than the 1.2% achieved in the Seventh Malaysia Plan (1996–2000). With the right strategies and programmes in place, coupled with appropriate institutional support and resource allocation, it is expected that the Malaysian agricultural sector could be revitalized, transformed and significantly contribute to the growth of the national economy. However, in order for the sector to sustain growth, strategies formulated must be market driven focusing on increasing productivity and enhancing competitiveness. Growth cannot be sustained through restituting protectionist measures and by increasing subsidies. In stimulating the growth in this era of trade liberalization and globalization, this paper argues that building competitiveness to be a ‘global player’ might be the only chance the country has in order to succeed. To meet this objective, a few strategies were suggested.

### **Introduction**

The agricultural sector had been the mainstay of the Malaysian economy for many years since independence. During those early days, agriculture, mainly rubber and timber contributed more than 50% of the country’s GDP. Diversification efforts in agriculture saw the successful establishments of oil palm and cocoa. It is through these primary agricultural commodities that Malaysia accumulated its early wealth to finance the development of the other sectors of the economy, namely the industrial and service sectors.

Aggressive industrialization coupled with heavy investments in the service sector that was mainly public-sector driven, such as in the telecommunications and banking, starting in the mid-1970s had resulted in accelerated growth of these sectors. Starting from the late 1980s, agricultural growth and contribution, on the other hand, started to decline. Growth in agriculture slowed down from 7.0% in the 1960s to just 4.1% in the 1980s.

In 1987, for the first time in the nation’s history, manufacturing overtook agriculture to become the leading sector of

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the economy. In that year, the manufacturing sector's contribution to GDP rose to 22.6%, surpassing the contribution of agriculture of 21.7%. Since then, the contribution of the agricultural sector to Malaysia's economy began to rapidly decline. In 2008, the share of agriculture to the GDP was only 7.6%. The economy is now driven by the manufacturing and the services sectors, accounting for about 84% of the total GDP in 2008 (EPU 2009).

The drive towards industrialization in the mid 1980s into the 1990s left agriculture in the back seat of the economy. Government policies during this period were biased against agriculture vis-à-vis manufacturing and services (Lim 1991; Tengku Ariff et al. 1993). It was only after the Asian financial crisis of 1997/98 that the government re-realized the importance of agriculture, not only just in its role to tackle poverty and other socio-economic issues but also as supplier of food for the nation. The crisis also underscored its importance as an economic buffer during bad times and the potential to create new sources of growth from new and competitive agricultural industries.

In the Ninth Malaysia Plan (2006–2010), the government planned to transform the agricultural sector through its emphasis on “new agriculture” involving large scale commercial farming, the wider application of new technology, production of higher quality and value added products, exploitation of biotechnology as well as human capital development. There were also plans to “turn-around” the country from being a net importer into a net exporter of food and food products. Can this ambitious plan to transform and “turn-around” the agriculture sector succeed? Even if it succeeds, can the transformation process contribute significantly to Malaysia's economic growth in comparison to the industrial and services' sectors? This paper will seek to answer these questions.

It will start with a brief analysis and discussion on the salient features and trends

of agricultural development at the domestic and global levels. This will be followed by an examination of the issues and challenges facing agricultural development in Malaysia. The last section consisted of suggestions of strategies and options on how to transform and move agriculture forward for economic development and growth as well as an assessment on its potential successes.

## **Salient features of agricultural development**

### ***Overall scenario***

The Malaysian agricultural sector is characterized by a distinct duality in its industries. On one side is the more efficient primary commodity subsector (oil palm, rubber, cocoa and timber) which accounted for about 60% of the agricultural GDP (AGDP), while on the other side is the less efficient food and “other agriculture” subsectors (paddy, fruits and vegetables, livestock and fishery, tobacco, pepper, coconut and others) which accounted for about another 40% of the AGDP. This structural composition of the sector has not changed very much over the last 20 years with the primary commodity subsector dominating both AGDP and exports. Taken together, consistently for the past 50 years or so since independence, Malaysia has been a net exporter and is now ranked number 16 as the top exporter of agricultural products in the world registering an annual average growth rate of 16% from 2000–2007 (*Table 1*). Malaysia's share in agricultural exports to the world market for the 2000–2007 period ranged from 1.41% to 2.01%, showing an increasing trend.

However, trade in the food subsector has always been in deficit and this deficit continues to widen over the years. Thus, in Malaysia when one talks about transforming the agricultural sector, it is more on transforming the food subsector rather than agriculture as a whole since the primary commodity subsector, especially Malaysia's palm oil, continues to be the most internationally competitive commodity in the

Table 1. Total agricultural exports of top 20 countries in the world (billion USD)

Name	2000	2001	2002	2003	2004	2005	2006	2007	AGR (%) 2000/07
United States of America	56.5	56.7	55.6	62.3	63.9	65.3	71.4	92.7	7
Netherlands	27.9	27.8	32.5	41.9	47.8	51.0	54.9	67.6	13
France	32.9	31.3	34.8	42.1	46.7	47.2	50.4	58.8	8
Germany	24.1	24.4	26.4	32.8	39.2	42.5	47.4	57.5	12
Brazil	12.8	16.1	16.7	20.9	27.2	30.8	34.7	42.8	17
Belgium	17.2	17.2	18.6	22.6	26.3	27.2	29.4	34.8	10
Italy	15.6	15.7	17.5	20.6	24.4	25.3	27.8	31.6	10
Spain	14.0	14.5	16.5	21.4	24.3	25.1	26.7	31.1	11
Canada	15.7	17.3	16.5	17.6	20.6	21.8	24.7	29.5	9
China	13.1	13.0	14.5	16.9	17.3	20.5	22.4	27.7	11
Argentina	10.8	11.0	11.0	13.9	15.8	18.0	19.6	27.2	13
Australia	15.5	15.7	16.0	15.2	20.9	20.3	21.5	23.6	6
United Kingdom	16.7	13.4	14.7	17.2	21.2	21.6	19.6	22.9	5
Thailand	7.3	7.4	8.1	10.3	12.0	12.3	15.1	17.9	13
Indonesia	4.9	4.4	6.2	7.0	9.4	10.9	14.3	17.7	18
Malaysia	5.8	5.5	7.4	9.6	10.9	10.8	12.9	17.7	16
India	4.9	5.2	5.5	6.5	7.1	9.0	11.3	16.7	17
Denmark	8.8	9.2	9.8	11.4	13.2	13.6	15.1	16.5	9
Mexico	7.4	7.5	7.8	8.6	9.8	10.9	13.4	14.4	10
New Zealand	6.0	6.6	6.7	8.0	10.0	10.8	11.0	13.5	12

AGR = Average Growth Rate

Source: FAOSTAT (2009)

Table 2. Agricultural value added, 1995–2005 (RM million in 1987 prices)

Commodity	1995		2000		2005		Average Annual Growth Rate (%)	
		%		%		%	7MP	8MP
Rubber	2,129	12.4	1,868	6.5	2,264	4.9	-2.6	3.9
Palm oil	4,235	24.7	5,860	34.1	7,915	35.0	6.5	6.2
Forestry and logging	4,139	24.2	3,055	18.7	3,016	14.5	-6.1	-1.7
Cocoa	1,225	7.3	250	6.4	83	5.7	-1.1	-19.8
Paddy	516	3.0	590	2.9	632	3.2	2.7	2.7
Livestock	953	5.6	1,520	6.1	2,089	6.9	9.3	6.6
Fisheries	1,964	11.5	2,493	13.1	2,389	14.3	4.8	-0.9
Miscellaneous <sup>1</sup>	1,924	11.2	3,026	12.2	3,198	15.6	9.0	1.1
Total	17,085	100.0	18,662	100.0	21,586	100.0	1.2	3.0

<sup>1</sup>Includes coffee, tea, coconut, tobacco, pepper, vegetables, fruits, flowers and herbs

Source: EPU (1996 and 2006)

world. Despite this, general observations on competitiveness demonstrated that the food sector appeared to be gaining strength.

In *Table 2*, it can be seen that during the Seventh Malaysia Plan, all primary commodities registered negative growth except for palm oil while all food subsectors registered positive growth

including paddy, livestock, fisheries and miscellaneous (includes fruits, vegetables, herbs, flowers, etc). In the Eighth Malaysia Plan, strengthening of rubber prices in the international market resulted in its turn around from negative to positive growth while palm oil remained resilient with a growth consistently above 6%. However,

Table 3. Production of food commodities in Malaysia (1995–2010)

Food commodities	Production (tonnes '000)				Average Annual Growth Rate (%)		
	1995	2000	2005	2010	7MP	8MP	9MP
Vegetables	718	404	771	1,133	-11.5	12.9	7.7
Fruits	1,020	993	1,587	2,556	-0.5	9.4	9.5
Fisheries	1,241	1,454	1,575	2,071	3.2	1.6	5.5
Paddy	2,127	2,141	2,400	3,202	0.1	2.3	5.8
Livestock							
Beef	17	18	29	45	0.6	9.8	9.1
Mutton	1	1	2	2	2.4	10.2	8.5
Poultry	687	714	980	1,295	0.8	6.3	5.6
Eggs	6,242	399	443	600	-55.0	2.1	6.1
Milk	37	30	41	68	-4.3	6.4	10.2
Pork	283	160	209	241	-11.4	5.4	2.8
Total	12,373	6,314	8,037	11,213	-13.5	4.8	6.7

Source: EPU (1996, 2001 and 2006)

cocoa and logging continued to be negative. All subsectors in food, except for fisheries, continued to register positive growth.

The share of food in AGDP had also increased over the last 10 years, from 31.4% in 1995 to 34.3% in 2000 and reaching almost 40% in 2005. Generally, although food production decreased during the Seventh Malaysia Plan, it had showed significant increase in the Eighth Malaysia Plan. Eggs, vegetables, pork, milk and fruits all depicted negative growth rates during the 1995–2000 period but showed positive growth during the 2001–2005 period. This trend is expected to continue into the Ninth Malaysia Plan period (*Table 3*). This shows that the food sector is very much on its pathway towards expansion and that post-financial crisis efforts by the government to ‘re-strengthen’ this subsector appeared to be bearing results.

The food processing and other agro-based industries are also rapidly expanding. The value added of these industries has increased from RM13,584 million to RM16,928 million, registering a commendable growth of 4.5% per annum between 2000–2005 (EPU 2006). However despite its strong growth, it contributed to less than 10% of total value added in manufacturing. This is much below the norms of developed countries such as USA

(14%) and Australia (21%). Following the argument that the food processing and agro based industries would grow in significance as the economy progresses, then we can expect brighter prospects in this subsector as the country industrialized.

### International trade

Malaysia is basically a trading nation and is a strong player in the trading of agricultural products in the international market. The strengthening of its market shares over the years both at the global and regional levels showed that Malaysia has been able to position itself well in global agricultural trade. This, however, is not so if we isolate the trade performance of the food sector. Total deficit in food trade has increased from RM3.3 billion in 1995 to RM7.5 billion in 2005. Nevertheless, some positive developments emerged. Import rate has declined while export growth has increased within the last decade. Annual export growth of food increased from 8.1% in the 1995–2000 period to 8.7% in the 2000–2005 period while imports slowed down from 10.7% to 7.9% per annum for the same period. Currently, Malaysia is embarking on an ambitious “Balance of Trade Plan” which aims to register a positive balance of trade in food products by 2010.

### **Trade liberalization and globalization**

The spectacular economic growth experienced by Malaysia is primarily due to prudent balancing of national domestic needs and pursuing growth through international trade. With its small population and limited purchasing power, Malaysia realized it cannot depend on its internal market alone to achieve economic growth and to accumulate national wealth. It is with this realization that the country has been practising an open trade policy with a relatively liberal trade regime as compared to other developing countries.

GATT (1993) attributed much of Malaysia's economic success on its earlier liberalization of its economy and aggressive outward looking policies. However a number of industries in the agricultural sector, especially in the food subsector were government protected and subsidized. These industries, until today, continue to be inefficient and are costing the government hundred millions of ringgit to sustain. These industries include the rice and paddy industry, livestock (i.e. fresh milk and poultry), tobacco and tropical fruits.

Protection through border measures such as import bans and quotas, high tariffs as well as subsidies have weakened the industries in the long run. Except for poultry (which shows significant productivity improvements under protection), the other industries had not shown much changes in productivity. Pressures are increasing regionally and globally through the ASEAN Free Trade Area (AFTA), the World Trade Organization (WTO) and bilateral Free Trade Agreements (FTA) to further open-up these markets to imports. Obligations in AFTA require that all import tariffs on agricultural products, except for rice, be reduced to only 0–5% by 2010 while Malaysia's WTO obligations require us to reduce our direct subsidies for the paddy and rice subsector.

The above points to a critical need for the government to re-strategize agricultural development not *via* protectionist measures

but rather through market-based policies. It is important to note that economic growth under protectionism is no longer a feasible option. With efforts toward more liberal trade world-wide and the market opportunities available to Malaysia for its export-oriented products such as electronics and palm oil, Malaysia would have to open these protective markets for others to reciprocate.

### **Issues, challenges and prospects in Malaysian agriculture**

The majority of issues and challenges facing Malaysian agriculture is structural and supply-side in nature. Land, labour, capital and other inputs are increasingly more scarce for agriculture and food production as other sectors increasingly attract these basic factors of production. In the absence of innovation and technological improvements, the currently "high-factor dependent" agricultural industries would become uncompetitive.

Trade liberalization poses challenges and offers opportunities to Malaysia in expanding its global presence in agriculture. For example, the global trade of fruits and horticultural products has registered increases of more than 40% in the last decade. According to Taylor and Fairchild (2000) and Donovan and Krissoft (2001), the underlining factors that spurred growth in international fruit and horticultural products include:

- i) changes in trade policies resulting from liberalization measures,
- ii) increasing consumer demand due to strong economic growth world-wide and changing consumer preferences resulting from increasing health awareness,
- iii) technological innovations especially in the areas of post-harvest handling and storage, transportation and communication drive growth in international trade for perishables goods such as fruits and vegetables, and
- iv) the globalization of supply chain.

Malaysia needs to learn from these new developments and its past experiences to manage the transformation of agriculture for sustained economic growth.

The demand-side offers good prospects for Malaysian agriculture. Analysts forecast that food needs will rise at extraordinary rates worldwide. This is due to the expected rapid increase in population, rising levels of nutrition as income levels increases and changing consumption patterns resulting from lifestyle changes. The faster pace of life with increasing numbers of 'working-households' would enhance the demand for more convenience, fast food, and food away from home. This would lead to higher demand for processed food.

At the same time, greater awareness and consciousness toward health and the need to maintain a healthy lifestyle would increase the demand for nutritious food that are low in calories, fats and salts but high in fibre, minerals and vitamins. The finer needs of society for health, virility, vitality and beauty would lead to increase in demand and utilization of diet foods, health supplements and other related products.

Better health-care facilities coupled with a healthier life-style would lead to an increase in population of the elderly. This would result in better demand for special diet foods or specialized foods to cater for consumers with specific health problems and needs. Last but not least, increasing demand for society to be more competitive would result in more hardworking and productive people. This can lead to possible stress related health problems. Thus, to de-stress, 'relaxation' and aesthetic products including landscape and floriculture products would be sought upon, leading to increase in demand for these products.

Malaysia has the right ingredients and the necessary requisite economic foundation to successfully embark on an expansionary competitive growth in the agricultural sector. However, growth needs to be pragmatically pursued based on competitive strengths and learning capabilities rather than policy or

government-pushed developments. In the following section, strategies to transform and move forward Malaysian agriculture are suggested.

### **Positioning for agricultural growth**

Based on the discussions preceding this section, it is clear that Malaysia's success in transforming its agricultural sector to achieve sustained economic growth requires global positioning. Malaysia not only needs to become a global player, but should strive towards becoming among the best agricultural producers in the world; similar to what has been achieved in the palm oil industry. To position our agriculture globally, it is important to recognize that enhancing competitiveness is the key driving force.

Analysts attributed competitiveness to many reasons. Some explained that competitiveness is due to the availability of cheap and abundant labour. Others argued that it is due to abundant natural resources. However, Porter (1990) contradicted this and showed that economies like Germany, Switzerland, Sweden, Japan and to some extent Italy and Korea has bloomed despite of high wages, labour shortages and lack of natural resources. He advocated that competitiveness depends on the productivity by which a nation's resources are employed. Productivity on the other hand depends on both the features and quality of products, which determines prices, and the efficiency with which these products are produced. As such firms and nations need to continuously strive to enhance productivity, which typically is the prime mover of competitiveness.

### **Strategizing to enhance productivity and competitiveness**

#### ***Focusing on specific industries and industry segments***

Studies have shown that not all clusters within an industry can achieve international advantage. For example, in the watch industry, Switzerland is highly successful in high-end watches but is not as good

as Japan in the “standard-watch” market. Relating to Malaysian agriculture, it is obvious that we cannot be competitive in all of the agricultural industries. We need to select and decide on the specialized products that we want to excel in and the market segments that we want to focus. Given the nation’s limited resources, specialization would allow us to focus on fewer industry clusters making it more efficient to concentrate efforts and resources to these clusters to increase productivity and enhance competitiveness.

For example in the fruit market, it is unlikely that Malaysia is able to excel internationally in marketing its 15 fruit types that it is pursuing. New Zealand has been able to excel only in the Kiwi fruit while the State of Washington, USA only in Red Delicious apples while the State of California, USA in oranges. In poultry, for example, it might be advisable to just concentrate and be a world leader in antibiotic-free chickens, given the high labour and input costs that the country faced. The “ayam kampung” can potentially be a good global prospect for Malaysia.

***Nurture and further develop agricultural industries which exhibit signs of international competitiveness***

Efforts need to be geared towards further developing agricultural industries that have shown signs of competitiveness, i.e. expanding domestic industry and increasing export growth such as fruits like papaya, watermelon and fresh pineapple. It needs to be emphasized here that supply-push industries where domestic players are required to start from scratch need to be avoided as it is risky to pump in huge amount of funds to jump start these businesses only to find out later that they are unable to compete in the world market.

***Build and provide a strong support foundation for the industry to grow***

Nations succeed in industries where their national circumstances provide an

environment for innovation, improvements, change and growth. These include requisite economic foundation providers such as credit, institutional support, quality control, required information and infrastructure, and incentives.

***Reduce protection and expose new and old industries to international competition***

Studies have shown that firms gain international advantage because their home market is most challenging. This would stimulate firms to upgrade and widen their advantages. Protectionist measures on the other hand will breed inefficient industries.

***Encourage and provide environment for innovation and change***

Competitive advantage lies in the ability of national firms to improve, innovate and change. Change does not only imply technological change but also includes new product design, an improvement in the production process or even a new approach to market products. We also need to realize that competitive advantage is a dynamic and not a static concept. For example, Switzerland used to be the market leader for all watches but now it is taken over by China, though it still leads in high-end watches. At home, our international rubber market has been taken over by Thailand and Indonesia. As such it is crucial that improvements be pursued relentlessly in order to attain and sustain competitiveness.

***Intensify market-driven R&D for specialized products to service specific market segments***

Unfulfilled needs of customers should become a challenge to upgrade products and services and hence become a R&D agenda. The generation of new knowledge through R&D would be able to create specialized agricultural industries that can make Malaysia to be internationally competitive. To service special market segments, it is necessary for us to strengthen marketing

initiatives including market promotion, market intelligence and market research.

***Encourage ‘calculated-risk new industries’ with high demand and favourable supply side factors***

There are industries that developed purely through changes in consumer preferences world-wide. These industries are characterized by high consumer demand. They possess a very high potential for success given demand and domestic resource factors. However, these industries are yet to be proven in the domestic front. Malaysia should also take calculated risks to develop and attempt to position these types of industries for international advantage. One such industry is the herbal and health industry, which has attracted significant consumer demand in recent years. It would be a missed opportunity not to take advantage of such a demand situation.

**An assessment: Is it achievable?**

Agricultural performance, as indicated by the major economic parameters including economic growth and exports, in the Eighth Malaysia Plan had improved significantly. AGDP growth increased by 2.5 folds from only 1.2% in the Seventh Malaysia Plan to 3.0% in the Eighth Malaysia Plan period. This is above the target of only 2.0%. However, the target set for the food subsector fell short, achieving a growth rate of only 1.7% as compared to the targeted growth of 4.0% in the Eighth Malaysia Plan. In the Ninth Malaysia Plan, the growth target set for overall agriculture is 5.0% with an ambitious target of 7.6% for the food sector. Balance of trade in food was also targeted from the current deficit of RM7.5 billion in 2005 to a positive balance of about RM1.2 billion. To achieve this, the Ninth Malaysia Plan has adopted the following policy thrusts:

- i. increasing agricultural production, including venturing into new sources of growth with greater private sector participation,

- ii. expand agro-based processing activities and product diversification,
- iii. strengthening marketing and global networking,
- iv. enhancing income of smallholders, farmers and fisherman, and
- v. improving the service delivery system.

All the above thrusts seemed to be heading in the right direction to spur growth except for thrust (iv). With the inclusion of this thrust, the government seemingly continues to believe that upgrading the hundreds thousands of small farmers and fishermen into viable entities is achievable. It is unlikely that this will happen. As being argued, the inherent structural constraints such as small and uneconomic farm sizes will not allow them to rise and be economically strong. Instead the many small inefficient farmers will drag down the potential dynamism of the sector.

All programmes should only be addressed to spur the productive agricultural community, and need to be well targeted. Programmes to drive growth in the sector need to be differentiated from programmes to alleviate what the government termed as ‘pockets of poverty’ in the sector. This means to say that economic programmes that need to be market driven in nature to increase productivity and enhance competitiveness should be different from socio economic programmes that are associated with poverty. In this era of globalization and trade liberalization, the same programmes would not work in achieving both the economic and social objectives simultaneously.

While it is acknowledged that the poor needs to be assisted, these needs should be catered through welfare programmes that have clear targets. An exit programme that provides adequate safety net for these inefficient producers need to be planned and executed in order for the agricultural sector to thrive in this new era. The outcomes of these measures will ensure only the innovative and productive ones remained.



This 'new group', coupled with appropriate government programmes, institutional support and incentives would provide the impetus for the revitalization and the transformation of the agricultural sector as aspired.

### Conclusion

Overall, the Malaysian government's plan to transform the agricultural sector for growth appears to be achievable provided Malaysia is able to take advantage of the windows of opportunities that are available. Malaysia seems to be heading on the right track by focusing its efforts on 'new agriculture' such as biotechnology and higher value-added products. This paper has also demonstrated that the Malaysian agriculture industry and specifically the food subsector have recently seen improvements in its performance. Nevertheless, it is critical that Malaysia deepens its ventures into specialized niches to enhance competitiveness via technological change, innovation and improvements as these key elements are proven to assist in sustaining and enhancing international advantage.

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## **Abstract**

Kertas ini bertujuan untuk menilai usaha Kerajaan Malaysia dalam mentransformasikan dan menggiatkan semula sektor pertanian sebagai salah satu enjin pertumbuhan utama ekonomi negara. Analisis menunjukkan penemuan yang menggalakkan, dengan pertumbuhan yang agak memberangsangkan dalam Rancangan Malaysia Kelapan (2001–2005). Pertumbuhan sektor pertanian dalam tempoh tersebut adalah 3.0%, iaitu 2.5 kali lebih tinggi dari 1.2% yang dicapai dalam Rancangan Malaysia Ketujuh (1996–2000). Adalah dirumuskan bahawa dengan strategi pembangunan dan pelaksanaan program yang baik, yang disertai dengan sokongan institusi dan pengagihan sumber yang diperlukan, sektor pertanian Malaysia mampu ditransformasikan dan dipergiatkan semula bagi memberi sumbangan besar kepada pertumbuhan ekonomi negara. Walau bagaimanapun, pertumbuhan sektor ini hanya boleh dikekalkan sekiranya strategi dan program yang dibangunkan adalah berteraskan pasaran, yang ditumpukan untuk meningkatkan produktiviti dan daya saing. Pertumbuhan tidak boleh dikekalkan dengan dasar yang bersifat perlindungan dan melalui peningkatan pemberian subsidi. Dalam usaha untuk memberangsangkan pertumbuhan pertanian di dalam era liberalisasi perdagangan, kertas ini mengemukakan bahawa Malaysia tidak mempunyai pilihan lain kecuali untuk peningkatan daya saing industri ke arah menjadi 'pemain global' dalam industri pertanian. Beberapa strategi telah dicadangkan untuk mencapai objektif ini.