Australian Nuffield Farming Scholars Association

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Report of the Study Tour to
Europe & Peninsular Malaysia

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1993 Northern Territory Nuffield Farming Scholar

SUBJECT:
History of the Common Agricultural Policy of the European Community, CAP reform and the impact on global agriculture.

The Live Cattle Trade between Australia and Peninsula Malaysia

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Acknowledgement

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Firstly, I would like to thank the Australian Nuffield Farming Scholars Association for providing me with the opportunity to be part of, what is, a magnificent institution.

The Nuffield Scholarship provides, the recipients with a unique exposure to what is taking place in Agriculture, anywhere in the world. One of the Scholarships greatest attributes is the flexibility it provides. I like many Scholars before me left Australia with many preconceived ideas and plans, only to realise that if I was to get the most from my Scholarship I needed to be far more flexible in my attitude.

I would also like to thank Mr. Ashley Severin, 1987 Northern Territory Nuffield Scholar who brought the Scholarship to my attention and gave me support and advice with my application.

Also my referees Mr. Wim Burggraaf and Mr. Ric Evans, who were kind enough to submit statements in support of my application.

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1993 Nuffield Scholars

My fellow Nuffield Scholars and travelling partners, Tim Funston and Kym Green from Australia, Tony Jopp and Ian Mackenzie from New Zealand, Colin Edwards and Ian Hurrel from Zimbabwe and Jean Marc Texier from France.

As I settle into writing the report on my studies and adventures this year hundreds of thoughts come flooding back regarding some of the experiences we shared together in Europe, some printable many not. We certainly learnt a lot from each other and created a bond that will last a long time.

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Introduction

The European Community with its vast array of subsidy system payments and protectionist attitude towards trade with the rest of the world is not something to which I, as a Cattle Station Manager in remote Northern Australia had ever given a great deal of thought - this blissful ignorance was soon to change.

The terms of the Nuffield Scholarship requires all recipients from outside the U. K. to spend six weeks in the UK and Europe. This was followed by six weeks studying the live cattle trade in S. E. Asia.

This trade has been in existence for many years and over the last five years the number of live cattle leaving our northern shores has more than trebled. This has placed the Northern Australian Cattle Industry at the forefront of a very exciting

market.

The UK tour comprising visits to various farms, Agricultural learning institutions, grower organisations and Govt. Departments was not on the high list of priorities for my area study. The fact that it turned into one of the greatest learning experiences of my life only highlights my previous ignorance of International Agricultural Affairs.

I had planned to spend my time in Europe studying artificial breeding techniques and on doing some research before leaving Australia soon realised that if I wanted to be amidst the most progressive advanced animal geneticists in the world then leaving Australia was not necessary.

When I journeyed to Melbourne to sit before the Nuffield Selection Committee I took the opportunity to visit the Victorian Artificial Breeders laboratory and the work they are doing there is at the forefront of the artificial breeding world.

I also discovered that due to pressure from Animal Rights groups, the European artificial breeding and genetic engineering industry has almost gone underground. This was certainly confirmed once I arrived in Europe. Pressure from animal rights groups is so intense that the Meat and Livestock Corporation in the United Kingdom has removed all signs from the front of their head office and keep a very low public profile.

I therefore decided to try and unravel the myths and mystery of the Common Agricultural Policy of the European Community, and learn what it is that makes the European Community Government spend over 60% of the budget supporting the agricultural industry, which provides less than 1. 5% of the Gross National Product of the E. C.

I thought this would have particular relevance for two reasons, firstly the C. A. P. is undergoing the most serious attempt to reform it since its inception.

Secondly, coming from a country where successive Governments have instituted policies which have forced many Australian farmers off the land and refuse to acknowledge the contribution farmers both past and present have made to the Australian economy, I wanted to see why the European farmer was of value when we obviously are not.

History of the European Economic Community

The coming together of Europe to form a unified political and economic power has been talked about for centuries. Brief periods of unification were experienced in Europe, however, this was generally as a result of occupation by a neighbouring European conqueror.

After the conclusion of World War I in 1918 the Pan European movement and a proposal for a United States of Europe gained widespread attention and notoriety. Europeans with their extremely diverse cultures and very close common borders were sick of war and realised something positive needed to be done.

The outbreak of World War II, obviously meant that neither of these proposals ever came to fruition.

Shortly after the conclusion of World War II a very distinct geographical and ideological line was drawn between Eastern and Western Europe. Eastern Europe was quickly unified under the guise of Communism and the rise and fall of the Soviet Union and disintegration of unity in Eastern Europe is now a part of history.

The recent problems in Eastern Europe only highlights the fact that forced unification had never worked in Europe.

In 1947 Western Europe was a shambles, American aid was pouring in and the Governments of Western Europe got together to formulate recovery programs. In 1948 they formed the Organisation for European Economic Cooperation (OEEC) to help in the distribution of the Marshall aid plan.

The OEEC members were Austria, Belgium, Denmark, France, West Germany, Greece Iceland, Ireland, Italy, Luxembourg, the Netherlands, Norway, Portugal, Sweden Switzerland, Turkey, the United Kingdom and after 1959 Spain. Canada and the U. S. were associate members.

Worthy of note is the fact that at this time in Eastern Europe a similar organisation the Council of Mutual Economic Aid was formed. Its members were Albania, Bulgaria, Czechoslovakia, East Germany, Hungary, Poland, Romania and the U. S. S. R. . Yugoslavia and Communist Asian countries were sometimes represented at meetings.

In the period that followed the formation of the OEEC many other committees and organisations were formed to help in the rebuilding of Western Europe, however it was not until 1957 that the EEC was formed.

The six founding Nations Belgium, France, Italy, Luxembourg, the Netherlands and West Germany, met in Messina, Sicily in June 1955 to launch another effort at integration. This led to the signing of the Treaty of Rome in March 1957 and the European Economic Community was born.

Greece entered the E. E. C. in 1962, the U. K. , Ireland and Denmark in 1973; Spain and Portugal in 1986. Advanced negotiations are currently underway for Norway, Sweden, Finland and Austria to join. Poland, Hungary the Czech and Slovak Republics have also recently indicated their desire to join what we now know as the European Community.

Common Agricultural Policy

The C. A. P. is a system of policies developed to achieve the objectives of farm income support, promotion of technical and resource efficiency, price stabilisation and food security.

At the signing of the Treaty of Rome, in 1957, Agriculture was high on the agenda and the C. A. P. was tabled. The C. A. P. was finally ratified in 1962.

Agriculture was given a high priority in the formation of the E. E. C. due to widespread rural welfare problems, the relative backwardness of agricultural production methods and a desire for greater security of food supplies.

The fact that many thousands of people had died of starvation during World War II was never far from the peoples minds and the security of food supplies was seen as essential for national security.

The C. A. P. adopted by the six initial E. E. C. members was consistent with the highly protective agricultural policies already in place within the individual member countries. Many of these policies were a legacy of the depression of the 1930's, and in fact some of the countries had a history of financial support for Agriculture before the turn of the century.

The three fundamentals in place with the implementation of the C. A. P. were free trade within the E. E. C. , preference for member countries and joint financial responsibility.

This allowed for free trade of agricultural produce within the E. E. C. countries, with the only requirement for access being adherence to an individual countries health and disease protocol.

Countries outside the E. E. C. were able to export produce to the E. E. C. however this produce was subject to import tariffs.

The size and importance of Agriculture in the current E. C. member countries is indicated in the following tables.

	Total Land Area ('000 ha)	Area Utilised Agriculture ('000 ha)	% Area Utilised Agriculture	Total Population ('000)
Germany West	24, 884	12, 019	48. 3	64, 250
France	54, 886	31, 340	57. 1	56, 893
Italy	30, 107	17, 522	58. 2	57, 783
Netherlands	3, 732	2, 019	54. 1	15, 014
Belgium	3, 055	1, 390	45. 5	9, 987
Luxembourg	258	126	48. 8	380
U. K.	24, 419	18, 168	74. 4	57, 556
Irish Republic	7, 022	5, 705	81. 2	3, 515
Denmark	4, 307	2, 834	65. 8	5, 154
Greece	13, 191	9, 234	70. 0	10, 169
Spain	N/A	N/A	N/A	39, 887
Portugal	N/A	N/A	N/A	10, 384

	Civilian Labour Force ('000)	Number Employed Agriculture ('000)	% Total Employed Agriculture	%GDP Contribution Agriculture
Germany West	28, 433	1, 961	3. 4	1. 7
France	21, 733	1, 326	6. 1	3. 3
Italy	23, 870	1, 895	7. 9	3. 1
Netherlands	6, 784	289	4. 3	4. 2
Belgium	3, 815	100	2. 6	2. 0
Luxembourg	190	6	3. 2	2. 0
U. K.	26, 285	552	2. 1	1. 3
Irish Republic	1, 305	167	12. 8	11. 0
Denmark	2, 928	157	5. 4	4. 2
Greece	3, 961	972	24. 5	15. 2
Spain	15, 020	1, 486	9. 9	4. 6
Portugal	4, 474	796	17. 8	6. 2
Australia	7, 670	409	5. 3	3. 3

A point worthy of note for Australia is the decline in Agriculture's contribution to the GDP, in 1950 it was 26 % Employment in the rural sector was also much higher at this time, at around 15% Also the Rural Sector currently contributes 22. 5% of the value of our total exports, in 1950 this was 86%.

Affects of the C. A. P.

Since the implementation of the C. A. P. there has been a major turnaround in the agricultural trading position of the E. C. . It has changed from being one of the worlds largest importers of temperate zone agricultural products to the worlds second largest exporter.

This change in trading position has come at a high cost to both the E. C. and agricultural producing nations as a whole. It is estimated that, over the past decade, about 60% of the value added by agriculture in the E. C. has come from consumers and taxpayers by way of subsidies and transfers. These have amounted to approximately A$150, 000, 000, 000 a year. It is also
estimated that the C. A. P. has depressed world prices of major temperate agricultural products by an average of some 16%.

The cost to the Australian economy of the C. A. P. has been estimated at around one billion Australian dollars per year.

The greatest incentive the C. A. P. has given E. C. agricultural producers has been to produce quantity of produce without a premium for quality. This has seen agricultural production within the E. C. grow by around 2% per year while consumption has grown by only . 5% per year. This has caused massive overproduction of produce that is poor quality and is subsequently held in intervention stocks to be dumped on the world markets.

This has also caused the European Community farmer to become production driven rather than market led.

To give a few examples of how the principles of the C. A. P. have impacted on European agriculture I would like to quote some facts on the current state of affairs.

- Wheat production in the U. K. has risen from 2. 6 T/ha in 1950 to 7. 2T/ha in 1992, this increase in quantity has been at the expense of quality.
- The U. K. was only 65% self sufficient in Wheat in the early 1970's, it now produces over 125% of its requirements, however, a substantial amount of wheat is still imported to fill the requirement for good quality Wheat needed for bread making.
- This U. K. Wheat surplus goes into the wheat stockpile at prices around A$225 per ton.
- Current size of the E. C. beef stockpile is 1, 400, 000 tons, in 1992 the U. K. contributed some 80, 000 tons to the stockpile.
- Imports of red meat into U. K. from non E. C. member countries are valued at A$940 million per year. The total red meat imports into the U. K. per year are valued at A$3, 800 million per year.
- The U. K. has a A$13. 5 billion trade deficit in food and drink, this represents 42% of the total current account deficit of the U. K.
- National Government expenditure on supporting agriculture, expressed per person employed in agriculture are:

France	A$18, 173
Netherlands	A$ 8, 870
Germany	A$ 7, 313
U. K.	A$ 4, 250

It is these type of Government expenditure figures which have led farmers within the E. C. to call for a level playing field throughout Europe, we should be so lucky. A British Member of Parliament once said that farmers were becoming feather bedded - he was out of office in a week.

I would say that calling the European farmer "feather bedded " would be stating the obvious, politely.

Clearly the C. A. P. has got out of control, farmers in Europe are getting paid huge amounts of subsidy to produce commodities, unsuitable for the E. C. markets, the solution has generally been to trade off with Eastern Europe who has been happy to get whatever they can as long as it is cheap.

C. A. P. Reform

The essential reform needed to put the brakes on the massive over production the C. A. P. has brought about, will be a long time coming.

Efforts have been made previously for reform, however, these were made during a period when improvements in productivity were increasing at such at rate the reforms had little or no affect. The increase in wheat yields I have previously mentioned support this. I also saw intensively housed and fed Charolais cattle that were dressing 400 kg at 18 months of age.

The MacSharry proposal for reform was agreed upon by the E. C. Ministers on May 21 1992. This latest attempt to reach a compromise between over-production and starvation is seen as being quite realistic and workable.

Unfortunately, I disagree, I fail to see how anything short of the

complete dismantling of the C. A. P. will reduce overproduction. It will only be when the European farmer is at the mercy of market forces that they will be forced to produce a quality product that can bring a realistic price on an open market.

The C. A. P. is extremely complicated as are the current reforms. To attempt to explain the complete package is neither feasible, nor, practical, however, I would like to give a few examples of current subsidy system payments, also the reforms as put forward in the MacSharry proposal.

The Beef Special Premium, which is paid twice in an animals life time once at 10 months of age and again at 23 months of age, is currently A$74, this will be increased to A$110 in 1993 ;A$140 in 1994 ;A$165 in 1995.

The reform is hidden there somewhere, as you can only claim on 90 head in each age group. This is interesting when you consider that the average number of beef cattle per holding in the E. C. is 31, in the U. K. it is 78. This Beef Special Premium is paid completely separate to the market place where prices received for cattle are, to quote one U. K. farmer I met at a sale " not too bad at the moment lad".

I attended a few cattle sales and below are a few quotes.

Gloucester Market March the 15th 1993
Charolais Cross Steers 340 kg live A$3. 97 kg or A$1350
Limousin Cross Steers 345 kg live A$3. 66 kg or A$1262
Simmental Cross Steers 350 kg live A$3. 46 kg or A$1211

(These prices are calculated on today's exchange rate of A$1 = . 445p)

As you can imagine I was so pleased to find out these poor battlers got a subsidy and didn't just have to rely on getting murdered in the market place, unlike in Australia where we always get what we deserve.

As well as the Beef Special Premium there is also the calf processing premium which is A$185 if a calf is taken out of production before it is 10 days old. At the Gloucester sale I attended bobby calves averaged A$377 for 317 head, with a top price of A$669 for one exceptional Simmental bull calf.

The Suckler Cow Premium also came in for close scrutiny by Ray MacSharry, and his reforms. The Suckler Cow Premium is paid for beef producing cows and is not available for the dairy herd, the SCP in 1993 is A$128 and will be increased to A$174 in 1994 and A$220 in 1995.

There has been reform on stocking density limits which will go from 3. 5 livestock units per hectare in 1993 to 2. 5 L. U. /ha in 1995. A L. U. is a bovine animal over two years old, six months to two years is the equivalent of 0. 6 L. U. , sheep are classed at being 0. 15 L. U.

If you are in an area which may be home to a few furry little animals that are in danger of being run over by all the city people rushing into the country side to get a piece of the reform money before it goes, you will be expected to help protect these creatures. There is of course compensation if you are required to run a few less sheep or cattle, to the tune of A$385 per L. U. less you run. For every furry animal you can prove you are rearing you will receive A$185 per L. U.

As well as these quite hard to fathom reforms the E. C. has also provided A$18 million to "encourage the marketing and consumption of quality beef". These funds are to establish a program and the amounts to be available in subsequent years are yet to be decided.

Another measure to try to stem the overproduction is the Set Aside rule, this is where farmers must set aside at least 15% of their arable land on a rotational basis. The same land can only be set aside every 6 years. This will qualify farmers for a payment of A$272 per hectare set aside.

Conclusions

The C. A. P. is doomed to failure, no amount of supposed reform can save what is a totally unrealistic system of preventing the natural transition which has taken place in the agricultural industry throughout the majority of the rest of the world.

I know that many other countries in the world subsidise their agricultural industries and some subsidise even more heavily than the E. C. , however, I am dealing specifically with the E. C.

I met quite a lot of good farmers in my travels throughout Europe but nowhere did I encounter farmers with the dedication and commitment of the Australian Farmer. In Australia we have had to, and continue to weather the changing world around us. The C. A. P. of the E. C. has sheltered the European farmer from the changes of time.

The ideology of using subsidy payments to keep people on the land and support the peasant farmers rather than have them queue for welfare in the city sounds feasible, unfortunately this is not the case.

Over 90% of the farming subsidies are currently going to 10% of the European farmers and there are poor people leaving the rural areas at an alarming rate while the wealthy are moving into the countryside.

It is the peasant farmer who is missing out. A system based upon the payment of subsidy to those who can produce the most of any product enables the the big operator to get bigger while the small operator battles to stay viable, even with subsidies. Some of the larger estates in the U. K. are making hundreds of thousands of pounds per year in subsidy. I met many farmers who are sure the bubble will burst and are out to milk the system for every last cent before it runs out.

Many farmers laugh at the new C. A. P. reforms and the smarter ones have found the loop holes already and will continue to milk the system for all it is worth. There are also a great number of farmers who do not understand what the changes mean and some of those who should be getting their share will continue to miss out.

I could not fathom how the E. C. could implement the set aside system to take 15% of arable land out of production while their neighbours in the former Yugoslavia are dying of starvation.

The myth that Europeans have access to cheap food has been dispelled, the consumer is waking up. It costs the average family of four over A$2100 per year to support European farmers. Many small businesses close every day. The coal miners are made redundant by the thousands yet a farmer on 200 ha can live like a king, some deriving over 70% of their income from subsidy.

The problems the E. C. are currently facing with overproduction could well be the tip of the iceberg unless very strong measures are taken.

Possibly the greatest threat yet to the C. A. P. is the entrance of Eastern Europe and the former Soviet Union to the open market place. Eastern Europe has traditionally provided a great dumping ground for the E. C.

Productivity is much lower in the former Soviet Union and Eastern Europe and has only risen marginally in the last 20 years due to lack of capital input and the inability to fund the fertiliser application the E. C. enjoys. Farm incomes are very low and what farmer in the East wouldn't want a share of what his E. C. farming neighbours have?

It is hard to imagine that the E. C. will be able to prevent some of the Eastern European countries from joining. East Germany

was included as soon as German reunification took place. This potentially giant European trading block is frightening and would not only put the current C. A. P. under threat but would also impact quite substantially on Australian agriculture.

It is forecast that if Eastern Europe were to join the E. C. under the current C. A. P. and subsidised E. C. produce was kept out of the Pacific rim as per the Andreesen Agreement, it would cost Australian agriculture A$300 million a year in loss of market.

If however the E. C. were able to access the Pacific rim then this figure would increase to A$600 million a year, with the beef sector the biggest loser.

I learnt quite a lot during my time in Europe and perhaps the biggest lesson was just how fragile we are. The size of the European economies is awesome and without the support of the United States through the Blair House accord there is no way we would keep subsidised E. C. produce out of Asia. The Europeans know what is happening in Asia and believe me they want a slice of the market.

This made my visit to S. E. Asia take on a whole new meaning.
Australian Live Cattle Trade

Australian Live Cattle Trade

The live cattle trade between Australia and S. E. Asia has been in existence for many years, the first live cattle to leave the north were a shipment which left Darwin bound for Manila in April 1892.

This trade has had its ups and downs but has continued to grow steadily and in 1987, 28, 880 left the Northern Territory bound for S. E. Asia.

The most significant growth in the live cattle trade has been in the last few years and it is forecast that in 1993 over 160, 000 live cattle will leave Australian ports bound for S. E. Asia.

Darwin in the Northern Territory is still the major port of departure, however, approximately 40, 000 head will leave the port of Wyndham, in Western Australia during 1993. Geraldton and Broome in Western Australia, are also used to export live cattle.

The port of Karumba, in the Gulf of Carpenteria, in Queensland, is to be upgraded to allow North Queensland cattle producers access to a regional port for shipping their cattle to S. E. Asia. In 1993 4, 000 head left Karumba for S. E. Asia , over 50, 000 head were sent by road to Darwin from Queensland bound for the same market. Many of the cattle were sourced from the Cloncurry district, over 1800 kms from Darwin by road and only 300 - 400 kms from Karumba.

Never before in the history of the Northern Territory cattle industry has there been this number of cattle come from Queensland into the N. T. in one year. In fact the traditional movement has been from the Northern Territory into Queensland.

In 1992, 115, 000 cattle went from the Northern Territory into Queensland by the end of September 1993 only 35, 000 cattle had gone this way. The long term affect of this reversal of cattle movement is unclear, however, one thing is certain. The extra competition for the Northern Australian feeder steer is providing the Northern Territory beef cattle industry with a much needed boost.

Destination of the cattle leaving Australia has varied from year to year with the Philippines and Indonesia being the most rapidly growing markets. The other markets mentioned have remained quite stable for several years.

Cattle leaving Darwin and Wyndham ; 1/1/93 - 30/9/93

	STEERS	BREEDERS	TOTAL
PENINSULAR MALAYSIA	5, 815		5, 818
EAST MALAYSIA	6, 653		6, 653
BRUNEI	5, 955		5, 955
PHILIPPINES	59, 647	2, 522	62, 169
INDONESIA	20, 306		20, 306
THAILAND		1, 270	1, 270
	98, 376	3, 792	102, 168

(Figures supplied by the Northern Territory Department of Primary Industries, Economics Branch Darwin.)

There is little doubt that this Industry will continue to grow as the S. E. Asian countries become wealthier and the demand for beef continues to increase. The live cattle trade has provided the biggest single boost to the Northern Australian cattle industry since the implementation of road transport for livestock.

Malaysia

I chose Peninsular Malaysia as my region of study in S. E. Asia for several reasons. Firstly, Malaysia has had a very stable Government for quite some period of time now and is going through a period of extremely strong economic growth. Secondly, the company I work for is the largest exporter of live cattle into Peninsular Malaysia. This enabled me to follow up on cattle I had been involved in sending to Malaysia. Also I was able to get behind the scenes as a representative of an interested party, rather than be viewed as a complete outsider.

Malaysia is situated just north of the equator in central S. E. Asia. Covering an area of 330, 400 square km. it is divided into two regions 500 kms apart separated by the South China Sea.

East Malaysia comprises the States of Sabah and Sarawak on the island of Borneo.

Peninsular Malaysia comprises 11 States and extends from the mainland across from the Island of Singapore, in the South, to the Thailand border in the North. Malaysia has a population of 18. 2 million people, 15 million of whom live on the Peninsular. The population is made up of 60 % Malays , 30 % Chinese and 8 % Indians.

Islam is the State religion in Malaysia and is practised by 60% of the population, Taoism, Confucianism, Buddism, Hinduism, Sikhism and Christianity are also practised. Religion plays a very big part in the life of the Malaysian people and is reflected in the way they conduct their lives.

Religion plays an integral part in the nations diet, with Muslims unable to eat pork and the Hindus unable to eat beef. Beef plays an important role in the diet of the Muslims. This beef must be Hallal killed, this method of slaughtering is where an animals throat is cut and the animal bleeds to death. A Muslim will not eat any meat unless it is Hallal killed.

Business hours vary from State to State, with some States observing Friday as the weekly holiday instead of Sunday. Many Government offices close on Friday afternoon to allow people to attend prayers and the majority are open on Saturday mornings.

The Government in Malaysia is a Parliamentary Democracy, the executive powers are in the hands of the Head of Government, the Prime Minister Dr. Mahatir.

Dr. Mahatir has an extremely loyal following in Malaysia and you will find the photograph of the Prime Minister on the walls of shops, offices and houses throughout the country. The media

are also very supportive of the Government and the main daily news paper The New Straits Times, is very pro Government and Dr. Mahatir.

Malaysian Economy

Malaysia is one of the fastest growing economies in the world, recording real growth of 9 % in each of the last five years. Unemployment at 4 % is almost non existent, especially when you consider there are over six hundred thousand Indonesians in Malaysia on work permits. It was also put to me that there is the same number of Indonesians in the country illegally. On my travels throughout Malaysia I encountered many roadblocks with police looking for illegal immigrants.

The Minister for Finance Dr. Anwar was recently named one of the ten best finance Ministers in the world.

Average per capita income is around A$4, 500 and the per capita G. D. P. is the second highest in the region behind Singapore. Per Capita G. D. P. at A$3, 500 per year is five times that of Indonesia.

Manufacturing is the largest contributor to export earnings making up 68. 7% of total exports. Total exports in 1992 were A$63 billion. Palm oil accounts for 5. 4 % of exports and rubber 2. 4% Malaysia is the worlds largest exporter of palm oil, natural rubber, tropical timber and a leading world exporter of cocoa beans and pepper.

Visible signs of Malaysia's booming economy are everywhere you go, from the major highways being built, to the countless housing and building projects. In some areas housing and general living conditions are low by Australian standards, however, even in the remote rural areas every house has a car in the driveway, a telephone line running to it, and a television antennae on the roof.

There is no welfare system in Malaysia and the people are very industrious and hard working.

Live cattle Trade in Malaysia

Shortly after my arrival in Malaysia I attended the unloading of a boat load of cattle from Australia. The vessel, The Brahman Express, had on board 750 high grade Brahman and Brahman cross, steers and young bulls. The cattle had been supplied and shipped to Malaysia by the Heytesbury Pastoral Group and had taken 7 days to reach Port Kelang on the West coast near Kuala Lumpur, from the port of Wyndham in Western Australia. The cattle travelled extremely well and arrived in good condition. During the voyage the cattle consumed approximately 50 kg per head of good quality lucerne cubes.

The Malaysian based company which imports the cattle on a regular basis, Guthrie Rumitech Industries (GRI) has a very extensive network throughout the country and the imported Australian cattle end up as far afield as the Thailand border. GRI company director Dr. Rosli Mai Lam, a qualified veterinarian, who studied and practised in Australia, was present at the unloading of the vessel and he was extremely pleased with the cattle. Dr. Rosli is a very astute businessman who knows both the Australian and Malaysian Cattle industries intimately.

This shipment represented a fairly typical boatload of cattle that the Heytesbury Group send to Port Kelang every four weeks. The cattle were in three weight groups for three separate markets, 250 kg steers and bulls, 350 kg and 450 kg steers.

The 250 kg cattle are sold off directly into the rural areas, for farmers to finish off and slaughter locally. The 350 kg steers are placed in a local, GRI owned feedlot and fed on, for up to 150 days and slaughtered at the Shah Alam abatoir near Port Kelang. The 450 kg Steers are slaughtered at Shah Alam as soon as practical after their arrival in Malaysia. The slaughter of these heavier cattle is varied to suit market demand and many are often sent directly from the boat to the abattoir.

As soon as the cattle are unloaded onto the trucks they go directly to an authorised weighbridge which is situated in the port complex. The trucks must tare off before they are loaded as some will not return to the port. The nett weight of the cattle on the trucks is what the importing company will pay for.

The unloading of the boat was a slow and sometimes painful affair, with the handling facilities not up to what we are used to in Australia. I have attended the loading of many boats in Darwin and a vessel the size of the Brahman Express would generally take less than two hours to load. We commenced the unloading in Port Kelang at 8. 30 am and finished at 10. 30 pm, this I was told was not unusual. The unloading was quite well organised and all things considered it went smoothly. The reason for the lenghty unloading period is the trucks which take the cattle away. In Australia we have an extremely efficient stock transport industry, Malaysia is not this fortunate, there is virtually no such thing as a cattle truck, certainly not the 500 horsepower trucks towing, six forty foot decks as we have.

The trucks at Port Kelang were a maximum forty feet in length and as they carry cattle only once every four weeks and usually carry general freight they are not designed for transporting cattle. Also most of the trucks were used to do several trips as the feedlot and abatoir is quite close. Anyone who has been on the road around Kuala Lumpur will know that it can take several hours to do just a few kilometres in the very heavy traffic. So although the unloading operation went quite smoothly it was very much a stop, start affair.

I also attended the unloading of the Brahman Express in Singapore, two weeks later and this went smoothly and was slightly quicker than in Port Kelang, with none of the trucks doing a return trip, to the port. This shipment of livestock had come from Geraldton in Western Australia, on board were 450 kg Brahman cross steers for slaughter, 550 kg British Bred bulls for slaughter, Merino wethers, cross bred rams and feral goats.

The steers and some of the sheep were trucked across the causeway into Malaysia with the rest of the animals remaining in Singapore to be slaughtered. Whilst in Singapore I visited the quarantine yards and was surprised to see quite a few Australian sheep there which had been flown in. The sheep are flown in on a regular basis and although they fetch a premium price in Singapore there is not much profit in them due to the high air freight costs.

During my visit to Malaysia I was able to follow the progress of some of the Australian cattle and they certainly have mixed fates and fortunes.

The 250 kg cattle which go out to the rural areas and into small feedlots can end up all over Malaysia. I visited some of these small feedlots and they vary greatly in design and efficiency. The cattle will generally be fed on a ration of feedstuffs that are locally available and can consist of pineapple pulp, soya bean waste, palm kernel cake, palm fronds and rice bran, other feedstuffs like wheat bran and pollard and barley are usually imported. Design of the small feedlots is generally very basic and crude and the cattle tend to suffer the elements greatly. Performance of the cattle is often very poor due to variation in feed supply and inconsistency with the type of ration fed. I did however meet one farmer, Yaakub Talib from Malacca who understood the principles of cattle feeding very well and he was achieving a 1 kg per day weight gain for a cost of A$1. 20 per day. Yaakub was able to achieve this gain for every day he had an animal on feed and was able to produce a suitable carcass for the market with a good dressing percentage and very little fat. He had the ability with his feeding regime to increase the

weight gain up to 1. 5 kg / day, however, the animal would lay down too much fat. The average weight gain in the majority of the small feedlots would be from . 5 - . 7 kg / day, with complete ignorance of carcass composition. Yaakub also had an efficient slurry waste disposal system, where all of the manure from cattle pens drains into a main sump, the solids are then separated and the waste water is pumped onto his pasture as fertiliser. Without doubt this man is way ahead of his time, by Malaysian standards and his cattle and whole operation would be the best I saw, on any scale, in Malaysia.

The 350 kg cattle will go into the larger feedlots which are located in close proximity to major cities. I visited three such feedlots, one near Kuala Lumpur and two near Johor Bahru.

The feedlot in Kuala Lumpur was very open, with no pens and the cattle had freedom of movement over quite a large area. The feed troughs were on a concrete slab under roofing and there certainly appeared to be ample troughing and room in general. The cattle were fed on a ration of only Palm Kernel Cake and were doing . 7 kg / day. There were 350 head on feed when I visited, the feedlot has a capacity of approximately 1, 000 head. The feedlot is very basic but also practical as the land the feedlot is on has been zoned as industrial land and is ten kilometres from the port and the same distance from the city. The land the feedlot is on is worth in the vicinity of 3 billion Malaysian dollars and the feedlot will be dismantled in the not too distant future.

The largest feedlot I visited was just outside Johor Bahru and had a capacity of over 2, 000 head, the majority of this feedlot was extremely well designed and constructed. The company which owns the feedlot also owns quite a large pineapple processing plant and the cattle in the feedlot eat a ration dominated by pineapple pulp. The pineapple pulp is fed ad lib and the cattle eat in excess of 40 kg per day for a weight gain of approximately 1 kg / day. The cattle were all in pens, approximately 25 head to a pen, depending on the size of the cattle, there were some 250 kg steers in this feedlot. There was an area of the feedlot which was only recent in construction which has elevated pens with slatted flooring. The pens were built into the side of a hill, a road on the high side allows easy access for feeding and on the low side there is ample room to access manure buildup. The slatted flooring has many benefits, the extra ventilation is very conducive to better performance in Malaysias humid climate. As the pens do not require cleaning out the cattle are left completely undisturbed and experience minimal stress, also the absence of water to hose out pens requires minimal waste management as manure can be disposed with a front end loader and tipping truck. Animal waste management is not at this stage a big issue however more stringent environmental laws will eventually ensure it is. It should be noted that the type of open air feedlots which are common place in Australia are not practical in Malaysia's climate, concrete or slatted flooring is essential as is roofing over feed troughs.

The other feedlot I visited was in Gelang Petah just outside of Johor Bahru. This feedlot is on land that is being reclaimed by the Malaysian Government and is very badly neglected. The feedlot started off only quite small, catering for less than 100 head, it can now handle up to 1000 head. The feedlot has all concrete floors, which require hosing out each day, this disturbs the cattle and creates an extremely humid environment, which certainly inhibits production.

The water, manure slurry drains into a sump and is left untreated. I spent a few days working in this particular feedlot and the handling facilities are not conducive to either man or beast. The feedlot management recognise this, however they are unable to implement any improvements due to the impending shutdown of the feedlot when the Government reclaim the land. I held lengthy discussions with the feedlot Management and ownership regarding ways they could improve their production and efficiency. They intend to visit Australia before commencing work on a new feedlot and I am sure they will be able to incorporate many of our designs and methods into their operation. The feeding regime in this particular feedlot was tailored according to the type of animal being fed and the combination of feeds given were doing a good job given the environment the cattle were in. Weight gain was . 7 kg / day for a cost of A$ 1. 2 day.

Whilst I was in Malaysia cattle were selling on the open market for 3. 80 Malaysian dollars per kilogram liveweight.

The Wet Market in Malaysia

The major outlet for locally slaughtered beef is still without doubt the wet market. Anyone who has seen an Asian wet market will know what I mean when I say they must be seen to be believed. I visited many wet markets throughout Malaysia during my stay and there is one thing they all have in common. That is the filth, smell and the pervading air of disease that abounds. Hygiene is virtually non existent in the wet market place and not one of the markets I visited would remain open in Australia. As the wet market is the predominant outlet for the live cattle sent from Australia into Malaysia I spent quite some time in the market place observing what transpires.

The Beef for sale in the wet market is made up of three products, firstly the Australian bred, Malaysian slaughtered animal, secondly the locally bred and slaughtered animal and finally the buffalo meat that is bred and slaughtered in India and shipped frozen to Malaysia. Beef from China is also starting to play a role in the market place.

The Indian Beef currently plays the biggest role in the wet market and although it is hard to get accurate figures on the total amount imported, the Cattle Council of Australia put the figure at close to 50, 000 tons per year. This Indian meat is of very poor quality and sells for half the price of the locally slaughtered product. There are many unscrupulous butchers operating in the wet market and I was able to observe some of the tricks of the trade. What some will do is defrost their Indian beef and cut it all up into small pieces, they then get rid of the boxes the meat was in and they will then buy a set of ribs or a shoulder and hang this in front of their stall to give the impression they are selling all fresh meat.

The better cuts from the locally slaughtered cattle sell on average for twelve Malaysian dollars per kilogram, Indian beef averages six dollars per kilogram.
The trade in Buffalo Beef from India into Malaysia was originally quite important to both countries, India was at one time Malaysias largest customer for palm oil, this is no longer the case. India currently sources the majority of its palm oil requirements from Indonesia and Malaysia sells most of their palm oil to China.

Officials from the Malaysian Government who I spoke to regarding the buffalo imports from India believe that market forces will dictate the future of this trade. As it is no longer politically influenced it will certainly decline.

There is now a blossoming trade in beef from China and this product will take over from Indian meat to provide a cheap source of beef. The beef from China is a much better product than is the Indian product and with the Chinese in Malaysia having enormous power in the business community, this trade will continue to grow.

The price of the cheap frozen imported meat from both China and India will rise in the Malaysian market place as more stringent health requirements are placed on these countries by Malaysia.

The locally produced and slaughtered cattle play a more important role in the more remote areas of Malaysia, than in the

cities. The local animals are very poor quality, usually inbred and have very restricted grazing. Average weight at slaughter is around three hundred kilograms liveweight. The Malaysian farmer who breeds a few cattle views his cattle as a form of wealth to be saved for a special occasion and the turnoff from the local cattle is very spasmodic.

The major feedlots supply the butchers selling fresh beef in the wet markets of Malaysias major cities. The majority of this beef will be the Australian bred and locally slaughtered cattle. These cattle will be slaughtered the day before they are sent to the market and kept overnight in a coolroom at the abatoir. Whilst I was in Malaysia the department of Veterinary Services introduced a policy of day time slaughtering. Previously all cattle were slaughtered during the night and the meat went directly from the abattoir to the wet market. This satisfied the Malaysian consumers belief that for meat to be fresh it should still be warm. The introduction of day time slaughtering was met with very stiff opposition and quite frankly most abattoirs are not equipped to store any amount of meat for even a few hours. The coolroom
facilities, and I mean coolroom, not chiller, simply are not adequate to store meat. Much of the product which I saw placed in the coolroom after slaughter would be condemned in Australia. The offals are placed in the same coolroom, meat is hung touching other meat and there is not enough circulation to allow rapid cooling. By the time the meat and offals reach the market place a lot is completely unsaleable.

Another point worthy of note is that the trucks which deliver the cattle to the abatoir are the same trucks which deliver the meat to the market. The back of the truck is hosed down and the meat is thrown on the back to be delivered. There is no such thing as a refrigerated truck and the meat is not hung on the truck, it is stacked on top of other meat.

By the time the meat finally reaches the market place it not a good quality product.

I spent quite some time in the wet markets observing the customers and there is a definite trend, in the age group of the meat buying consumer. The young people who follow the tradition of shopping in the wet market generally give the meat section a big miss, the majority of the customers are either middle aged or elderly. I saw time and again a young couple turn their nose up at the red meat section in preference to chicken or fish.

There is much work being done to overcome many of the problems I have stated above.

Firstly, let me state THE WET MARKET IS HERE TO STAY. After my initial observations of the wet market I thought it would only be a matter of time before they are phased out. This will not happen. In Johor Bahru a new market complex has just been completed and should be operational early in 1994. I inspected the new market and whilst there is much improvement on the old one, there are still some inadequacies, like refrigeration facilities, for the meat section.

The wet market in Malacca is getting a face lift, to the tune of half a million Malaysian dollars, with the main emphasis on hygiene. This will go a long way as the Malacca wet market would be one of the better market places I saw.

Without doubt the brightest light on the horizon is to be found in the market of Seremban. The meat section of the Seremban market is having two hundred thousand Malaysian dollars spent on upgrading it. This project is being partly funded by Australia and will see every butcher in the market place with a coolroom, a glass front meat cabinet and a tiled, hygienic work area. The Department of Veterinary Services will place a meat inspector in the market to enforce hygiene levels and ensure unscrupulous traders are kept out.

The Malaysian Government is aware of the lack of hygiene in some of the abattoirs and plans are under way to increase the standards to an acceptable level. This will see many abattoirs close which is part of the plan to more centralised meat distribution. I spoke with the Director of Planning for the Department of Veterinary Services, Dr. Noordin, who seems a bright future for the meat industry. Dr. Noordin spoke of his plans to create a meat slaughtering and distribution system not unlike what we have in Australia. Where the abattoirs are fewer and more centralised, these abattoirs would be of a high standard with chiller facilities to store beef for lengthy periods. Also a meat distribution network of refrigerated trucks supplying the market place.

There are currently over seventy abattoirs in Malaysia, many of which are not suitable for any form of slaughtering. The abatoir in Kluang is currently used to house goats while the slaughtering takes place on a concrete slab outside. The other extreme is the abatoir in Seremban which would be as spotlessly clean as any abatoir you would find in any country in the world. Seremban abatoir also has an excellent chiller facility.

Apart from the wet market there are also many western style supermarkets and some butchers' shops.

I spent some time with a Mr. Jeffrey Ong in Johor Bahru who is an innovative person who imports Australian cattle, has a feedlot, sells live cattle to many parts of Malaysia and operates a retail meat centre.

Jeff started in the meat business seven years ago in a small way, almost as a sideline, he now is one of the major operators in the meat industry in Malaysia. The meat centre in Johor Baru is typical of the many thousands of retail butcher shops you will find all over Australia. Acceptance by the Malays to buying their meat requirements in this style of outlet has been very slow and the predominant customers would be expatriates. The Malaysian people still require a great deal of education as to the benefits of chilling meat and they hold a belief that for meat to be truly fresh it should be warm.

People like Jeffrey are breaking new ground all the time and the amount of work he and his staff put into consumer education and trying to improve the meat handling facilities in Malaysia is very commendable.

Other Agriculture in Malaysia

During my stay in Malaysia I was fortunate to be able to travel quite extensively throughout the country and I visited ten of the eleven states in Peninsular Malaysia.

The palm oil Industry has taken over from the rubber industry as the countries largest agricultural Industry. The decline in the rubber industry came about with the introduction of synthetic rubbers. In many parts of Malaysia you will see where rubber plantations have been pulled down to make way for the planting of palm oil trees. Palm oil production is a very lucrative enterprise, once the trees are planted they will be in production within two to three years and have a productive life span of twenty five years. The palm oil tree requires very little maintenance and is harvested every two weeks. The intensive horticulture industry in Malaysia is mainly confined to the Cameron Highlands, where the cool climate provided by the elevation lends itself to production of tea, strawberries and other delicate crops. Tropical fruits abound in Malaysia and all types of exotic fruit can be found in abundance throughout the country. Rice is grown in many parts, however, the state of Kedah is the rice bowl of Malaysia.

Perhaps the most exciting agricultural industry I saw in Malaysia is the dairy industry. Malaysia currently only provides 5 % of its total milk requirements and the potential to expand in this industry is enormous. The Malaysian Government has a policy

where it aims to supply 15% of the countries whole milk requirements. In simple terms this means a threefold increase in current production, with a lot of support from the Malaysian Government.

I visited a State run dairy farm just outside Kluang and they have achieved enormous progress over the last twenty years. The biggest single factor in this progress is in the type of cow they are now milking. The ideal animal is slightly over 50 % Freisan with the remainder being Sahiwal. The Australian Freisan Sahiwal A. F. S. has provided the platform for much improvement and is highly sought after in Malaysia. Any breeder of these cattle within Australia will testify to their popularity in the S. E. Asian countries. I am led to believe that forward orders for these cattle are so strong that there is not an A. F. S. calf on the ground in Australia that is not sought after. Freisan Sahiwal cross cattle are also imported from New Zealand and the Malaysians are breeding their own animal the Mahfreiwal.

On the state farm near Kluang over the last twenty years calf mortality has decreased from 34 % in 1971 to a current level of 4. 2 %. Milk yield varies greatly from 2 L per day to 20 L per day and seems to average 10 L per day. The Kluang farm incorporates a substantial amount of grazing in the feeding program. On a commercial basis grazing cattle is not a viable option as land is simply too valuable to justify grazing. Good grazing land will sell for in excess of A$20, 000 per acre and a better return can be gained by simply planting palm oil trees.

The Department of Veterinary Services is looking at ways of incorporating grazing under palm trees but it is very difficult as the trees form a total canopy quite early and nothing will grow under this. I feel that for a dairy enterprise to be viable the cattle will need to be intensively housed and fed. Malaysia has an abundance of feed sources but a scarcity of land. I mentioned before the Palm Kernel Cake which is produced after the oil has been extracted from the palm fruits, this P. K. C. has an enormous role to play in the future. P. K. C. is currently exported to parts of Europe for dairy feed and yet there are only a few people in Malaysia who have realised the potential of this resource.

Conclusion

Firstly, I would like to say how much I enjoyed my visit to Malaysia, the people there were extremely friendly and helpful and I have many fond memories of this wonderful country. I have tried to be objective with my report and hope I give no offence to the Malaysians who are good enough to read it. I have been critical in my assessment of some of the market places and abattoirs but I think I have given an accurate account of what I saw. I am aware that many changes are taking place and it all takes time, with the dedication and commitment I witnessed in so many places I am sure it will all come together.

Australia is in an ideal position to help the progress of not only Malaysia but also other S. E. Asian countries. Australia has without doubt one of the finest most efficient agricultural industries in the world. We are overflowing with expertise and in sharing our knowledge with our Asian neighbours we will all benefit.

S. E. Asia is lacking in one of the things of which we have an abundance, land. If we are able to foster good strong relationships with our Asian neighbours Australian agriculture has a bright future indeed.

European and American markets will always play a role in our economy, but they are our past, Asia is our future.

Australian are naive to think we will get an easy ride in Asia simply because we want to do business. The Australian image in Asia is not a good one, we are seen by many as being lazy opportunists who have operated in Asia without good ethics.

The recent incident between the Australian and Malaysian Prime Ministers should not be treated lightly. If they respond in this way over what we see as a minor issue would they do if there was a major incident? The people in Malaysia threw their support behind the Prime Minister immediately and it was the people not the Prime Minister who wanted to introduce sanctions against Australia.

As Australians, we may not agree with many of the customs and beliefs of the S. E. Asians but we must respect them if we are to do business there.

I attended the Food Malaysia Trade Fair in Kuala Lumpur in September and countries from all over the world were represented. The people from these countries are very keen to break into the Malaysian market place and we are competing against people who have a much better reputation than we do. New Zealand has a good reputation in Malaysia and the New Zealanders are seen as providing good after sales service and backup.

An example of how Australian product is viewed is apparent on the menu of most restaurants serving steaks. You will often see prime New Zealand or U. S. steaks advertised but very rarely will you find Australian meat advertised this way. I asked a master butcher at a five star hotel why he did not use Australian steak and his reply was quite disturbing. He said if he used New Zealand steak he never got complaints, but an Australian firm had provided him with steak to use as a trial and he had received three complaints from the customers. Surely we can do better than that.

The future of the live cattle trade between Australia and S. E. Asia is indeed looking very healthy, but are we, as Australian cattle producers getting the full benefits from this trade. I would suggest we are not. Whilst this trade has given the Northern Australian cattle industry a much needed boost, I feel the long term affects of this trade are yet to be clearly analysed.

How do we value-add to a product once it leaves Australia? The simple answer would be for Australian firms to form joint venture companies with our S. E. Asian trading partners, and I am sure this is taking place now. This will see a certain percentage of the value added profits return to Australia and must be more desirable than is the current situation.

I have previously discussed the inefficiency that abounds in the beef cattle industry of Malaysia and from all reports many other S. E. Asian countries are in the same situation. If Australian companies are to be involved in joint venture operations in S. E. Asia I would suggest these levels of inefficiency will not be tolerated and we would see the levels of production and quality rise dramatically.

Whilst this is a good situation for all concerned, there will be benefits for Australians who supply live cattle and add value in Malaysia. This improved product will be entering the market place to compete with the Australian product which has been processed within Australia. Perhaps the competition will be good for all parties, perhaps not.

I do not have the answers and I pose the above statements at the risk of being labelled a cynic. I merely want people to stop and think long and hard about S. E. Asia, I really believe that if we as a Nation are to enjoy a good long term business relationship with Asia then we need to think long term.

If we rush in and fight each other for a piece of the profit, then we will lose out to the long term thinkers of the world.

Asia is not going to go away and we owe it to the future generations of both of our Nations to get it right.

Michael Sheehy
Northern Territory

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