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IMPLICATIONS FOR WORLD AGRICULTURAL COMMODITY MARKETS AND TRADE OF RAPID ECONOMIC GROWTH IN CHINA AND INDIA

I. INTRODUCTION

1. Asia has been a remarkably dynamic region over the past four decades: different economies in the region have experienced rapid growth, beginning with Japan between the 1950s and the 1980s, and then several newly industrializing economies. More recently, China and India have entered this process and are now referred to as the new “Asian Drivers”. In spite of their relatively low levels of per capita income, these two countries stand out in terms of their growth rates and size – about two-fifths of the world population and one-fifth of global income (measured in terms of purchasing power parity (PPP)). For these reasons, their economic performance can exert a sizeable impact on global commodity markets, trade patterns, and the economic prospects of other developing countries.
2. Not surprisingly, there has been a surge of interest in the implications of the rapid economic growth of the Asian Drivers for other economies, and the developing economies in particular. The main focus of such discussion is new opportunities and new challenges for the rest of the world.
3. It is in this context that this topic is considered to be relevant for consideration by the Committee within the broader theme of the state of world agricultural commodity markets and implications for agricultural trade. The objective is to initiate discussion on this theme and to solicit the Committee’s guidance for further work by the Secretariat in this area. Following this introduction, the rest of the paper is divided into two sections: a synthesis of key statistics and analyses; and a summary of some implications.

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II. SYNTHESIS OF THE ANALYSES

A. Analytical framework

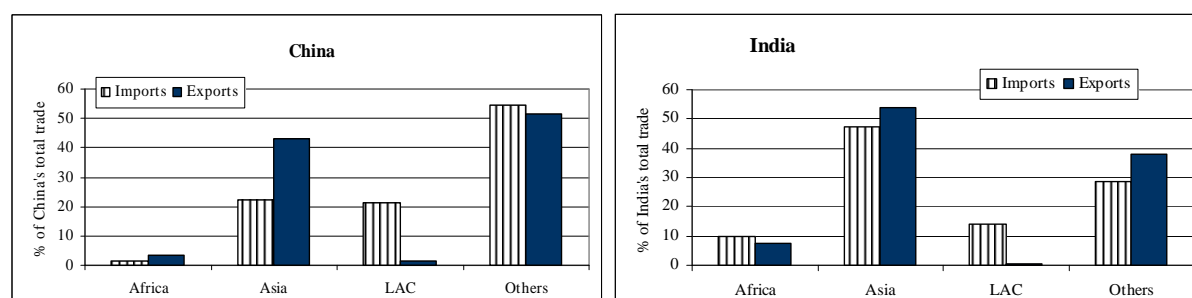
4. Most studies (cited in the references on page 10) follow a simple analytical framework based on qualitative analysis of trade statistics. The purpose is to understand whether the relationship between the Asian Drivers and other countries and regions is “competitive” or “complementary”. The impact on the rest of the world is assumed to be felt through three channels:
1. Trade channel
 - Increased exports to China and India (“complementarity effect”).
 - Increased competition from China and India in home markets (“competitive effect”).
 - Increased competition from China and India in third country markets (“competitive effect”).
 2. Global markets channel
 - Changes in world market prices and terms-of-trade.
 3. Direct foreign investment channel
 - Effects on foreign direct investment (FDI) (this could be “competitive” or complementarity”).
5. Of the three channels, analysis is relatively straightforward in the case of trade channels in view of the availability of disaggregated trade statistics and the more direct nature of the impact. In contrast, the impact through global commodity markets is felt indirectly as high economic growth in the Asian Drivers impacts on global commodity prices through trade and other linkages and thus alters the terms-of-trade for others. The third channel, through changes in the flow of foreign direct investment, works in both competitive or complementary ways, with the impact being negative where the FDI is diverted to the Asian Drivers and positive where the Asian Drivers invest in overseas markets. Lack of statistics on FDI in general and on agricultural products in particular, means that little is known about this channel and it is not discussed in this paper.
6. The remainder of this section summarizes key observations on the main questions posed from three separate sources. First, it presents data on bilateral trade between the Asian Drivers and other regions of the world in order to understand the nature of trade linkages and likely implications, along the line of the above-mentioned trade channel. Second, it summarizes the findings of recent country studies on China and India commissioned by FAO and undertaken by national experts. Both studies used the Global Trade Policy Analysis (GTAP) model to project outcomes to some point in the future. Third, the FAO Commodity Simulation Model (COSIMO) was run to simulate the impact on trade of China’s and India’s economic growth rates higher than in the baseline projections.

B. Trade linkages between the Asian Drivers and rest of the world

7. Non-agricultural trade linkages have received the most attention in the literature. This is rightly so because the most dynamic trade of the Asian Drivers has been mainly in non-agricultural goods and services, notably petroleum, minerals, metals, textiles, footwear, toys, light electronics, software and even outsourcing. In agriculture also, there are several products that have been prominent in terms of the growth in trade, notably feedstuffs, oilseeds and vegetable oils, and raw materials like cotton.

8. Agricultural trade linkages between the Asian Drivers¹ and other regions are shown in Figure 1 in terms of the shares in aggregate bilateral trade and in Table 1 for major traded commodity groups. All the countries covered in the three regions (Africa, Asia and Latin America and the Caribbean (LAC)) are developing countries; the fourth region, “others”, mainly includes developed countries.

Figure 1: Asian Drivers’ share of total agricultural imports from and exports to various regions (2000–02 average)



Source: Based on COMTRADE statistics.

9. As regards aggregate total bilateral trade (Figure 1), the main features are as follows.
- Africa’s agricultural trade with China is very limited, amounting to 2–4 percent of China’s total trade², while trade with India is relatively higher in percentage terms.
 - The Asian Drivers’ trade with the LAC region is very much one-sided, with significant imports but few exports to the region.
 - About 50 percent of India’s trade (both import and export) is with Asia, while Asia accounts for a considerably lower share of China’s imports than is the case for China’s exports to the region.
 - China’s trade with developed countries is at about the same level as with the developing countries (about 50 percent); India on the other hand trades proportionately much more with the developing countries.

¹ All statistics reviewed in this paper for China do not include Hong Kong and Macao SARs and Taiwan Province.

² Note that, first, non-agricultural trade (e.g. in petroleum, minerals, clothing and other manufactures) is much higher, and second, even agricultural trade is known to have expanded considerably since 2002.

Table 1: Asian Drivers' agricultural trade with the developing regions of Africa, Asia and Latin America and Caribbean (2000–02 average)

	Percent of total regional value		Percent of total regional value
China's imports		China's exports	
From Africa (total \$196 million)		To Africa (total \$428 million)	
Tobacco/manufactures	61	Cereals/cereal preprtn	40
Fibres (cotton)	25	Coffee/tea/cocoa/spices	32
Others	14	Vegetables and fruit	11
		Tobacco/manufactures	6
		Others	11
From Asia (total \$2,630 million)		To Asia (total \$4,983 million)	
Crude/synthetic/rec rubber	38	Cereals/cereal preprtn.	25
Fixed veg oils/fats	25	Vegetables and fruit	19
Vegetables and fruit	13	Beverages	9
Others	24	Meat & preparations	8
		Others	39
From Latin America (total \$2,462 million)		To Latin America (total \$170 million)	
Oil seeds/oil fruits	57	Vegetables and fruit	48
Animal feeds	19	Cereals/cereal preprtn.	23
Fixed veg oils/fats	7	Others	26
Others	17		
From world (total \$11,662 million)		To world (total \$11,521 million)	
Oil seeds/oil fruits	25	Vegetables and fruit	33
Crude/synthetic/rec rubber	13	Cereals/cereal preprtn.	14
Fibres	12	Meat & preparations	12
Fixed veg oils/fats	8	Miscell. food products	6
Animal feeds	7	Others	35
Hide/skin/fur, raw	7		
Others	28		
India's imports		India's exports	
From Africa (total \$360 million)		To Africa (total \$352 million)	
Vegetables and fruit	52	Cereals/cereal preprtn.	48
Fibres	39	Meat & preparations	16
Others	9	Vegetables and fruit	8
		Coffee/tea/cocoa/spices	7
		Others	21
From Asia (total \$1,723 million)		To Asia (total \$2,557 million)	
Fixed veg oils/fats	58	Cereals/cereal preprtn.	34
Vegetables and fruit	21	Animal feeds	15
Animal/veg oils proces'd	8	Vegetables and fruit	12
Others	13	Sugar/sugar prep/honey	10
		Coffee/tea/cocoa/spices	9
		Others	20
From Latin America (total \$516 million)		To Latin America (total \$31 million)	
Fixed veg oils/fats	90	Oil seeds/oil fruits	28
Others	10	Coffee/tea/cocoa/spices	21
		Vegetables and fruit	15
		Fixed veg oils/fats	12
		Others	24
From world (total \$3,643 million)		To world (total \$4,752 million)	
Fixed veg oils/fats	42	Cereals/cereal preprtn.	25
Vegetables and fruit	23	Vegetables and fruit	19
Fibres	17	Coffee/tea/cocoa/spices	18
Others	18	Animal feed	9
		Others	29

Source: Compiled from COMTRADE statistics (accessed August 2006).

10. In terms of the agricultural commodities traded, the main features are as follows.
- In the case of China's imports from the three regions, four categories of products dominate the list – agricultural raw materials, animal feeds, vegetable oils, vegetables and fruits. Cotton and tobacco account for over 80 percent of Chinese imports from Africa, while oilseeds, oils and animal feeds dominate the export basket of the LAC region. Rubber and vegetable oils are the most important products imported from Asia, followed by fruits and vegetables.
 - In contrast to the import basket, China's exports are relatively diversified, with cereals and cereal preparations, meat and meat products, and fruits and vegetables being the dominant product groups.
 - India's imports are also concentrated in certain product groups, notably fibres (mainly cotton) and vegetable oils. Although the total value is relatively small, fruits and vegetables amount to 52 percent of India's total imports from Africa.
 - The composition of India's exports to other regions also appears to be similar to that of China, with cereals and cereal preparations appearing as most important, followed by meats and meat preparations, fruit and vegetables and animal feed (mostly oilmeal).
11. How this trade pattern might evolve over time is difficult to predict. Analysts agree that the current pattern of trade is consistent with resource endowments, policies and comparative advantages of the Asian Drivers.³ This shows up more clearly in the case of China – importing agricultural raw materials and feedstuffs to sustain agro-industries and growing consumption of meats while exporting relatively labour-intensive fruits, vegetables, meats and cereal preparations. To a lesser extent this also applies to India. Perhaps vegetable oil is an exception to this pattern but oilseed production capacity is highly limited in both countries for meeting domestic needs.

C. FAO country case studies on India and China⁴

China

12. This study used the Global Trade Analysis Project (GTAP) model⁵ to project outcomes to the year 2020, including the results for a higher income growth scenario. The study projected agricultural imports into China from the rest of the world to double between 2001 and 2020 and agricultural exports from China to increase by about 50 percent over this period.⁶ As a result, the model shows that China will be a significant net importer of agricultural products. Significant increases in imports were foreseen for several land-intensive agricultural commodities (notably oilseeds, feeds, sugar and cotton) as well as some labour-intensive products like tropical and sub-tropical fruits, processed foods, and pig and poultry meats. The principal beneficiaries were shown to be countries in the LAC region among the developing countries and North America, Australia and New Zealand among the developed countries.

13. In an alternative scenario with a ten percent higher economic growth rate (8.8 percent versus eight percent in the baseline), China was seen to import even more, with nearly all

³ Some results based on projections are reviewed below.

⁴ FAO commissioned in 2005 case studies for several Asian countries in order to understand emerging scenarios in agriculture for these countries as well as implications for others. The studies were reviewed at the FAO Asia Regional Conference in 2006. The China study was authored by Jikun Huang, Jun Yang and Scott Rozelle (Huang et al. 2006) and the India study by Bibek Devroy and Laveesh Bhandari (Devroy and Bhandari 2006).

⁵ The GTAP model is a multi-country, multi-commodity, general equilibrium model of the world economy and is a popular analytical tool for simulating the impact of trade policies.

⁶ Model projections are based on a number of assumptions such as those on GDP growth, trade policy, investment etc. In this particular case, the GTAP projections grossly underestimated China's actual trade. China's actual agricultural imports did indeed double in just three years, from about US\$16 billion in 2001 to US\$33 billion in 2004 (FAOSTAT data) while exports rose by about 31 percent in the same three years.

countries or regions modelled recording some further gains in production and export. China's food and feed net imports in particular were projected to be higher in 2020 by about US\$3 billion from the baseline level. For these and other products, China's increased import demand pushes up world market prices and leads to increases in production of food and feed in all modelled regions, particularly exporting countries. As was the case for the baseline, the degree to which other regions gain or lose from additional import growth depended on their economic structure.

14. One notable conclusion reached was that China's rapid economic growth provides more opportunities than challenges to the rest of the world in the area of trade and is not a threat to global food security (emphasis added). Moreover, the study found that even with a higher income growth assumption, the imports of staple foods like rice and wheat would not increase significantly as consumption is not sensitive to higher incomes. This prompted the authors to conclude that China's rapid growth will not threaten world food security.

15. The study argued that China's economic growth along with the more liberal trade regime helps those countries with a comparative advantage in land-intensive agricultural products to expand their production and export additional agricultural products to China's markets. Rich natural resources exporting countries also gain considerably from China's increasing demand for energy and minerals.

India

16. The India case study also utilized the GTAP model to project outcomes to the year 2020. It found that, overall, India will remain a marginal exporter of wheat, coarse grains, sugar, cattle and red meat, fish, and other foods. It will become a significant importer of oilseeds, forestry products, other animal products and plant fibres. In products such as plant fibres and other animal products, its position as a net exporter of manufactured items will be facilitated by the larger imports of raw materials. Forestry products are shown to be significant import items, principally wood.

17. Based on the results for a scenario with higher income growth, the study concluded that, on the whole, the broad picture seen in the baseline does not change whether economic growth is 6 or 8 percent. For example, India would continue to be a large importer of forestry products. Similarly, its position as a significant textile and garment producer would require the large-scale importation of plant based fibres, irrespective of the 1–2 percent variation in growth.

18. As in the China case study, results were not particularly sensitive to income changes but very sensitive to the assumptions about productivity. Yields are currently quite low in large parts of India so technological breakthroughs can lead to rapid increases in output (BT cotton is an example). Rice is not as much of a preferred cereal among the growing middle classes, and the income elasticity of demand has been falling. In other words, estimates of rice surpluses are not as sensitive to economic growth assumptions. Vegetable oils are one exception: income growth will increase the demand for vegetable oils, as was the case for China, and given low production potential of oilseeds and high demand, imports will increase.

D. Implications of higher economic growth in China and India for their trade and global markets

19. To complement the previous analyses, the impact of higher income growth on markets for a number of food products was also assessed with the help of the FAO-OECD projections model (COSIMO). This was done by running a scenario with the economic growth rate of both countries assumed to be two percentage points above the baseline assumptions for each year during 2006-2015 (all other assumptions were retained as per the baseline).⁷ The impact is assessed by comparing the values of production, consumption and trade between the baseline and higher

⁷ The baseline projections are published in OECD-FAO (2006).

growth scenario for the year 2015, the last year of the projections (Table 2). The extent of the impact on the rest of the world depends mainly on the impact of the higher income growth on China's and India's trade.

Table 2: Impact of two percentage points higher income growth in China and India on production, consumption and trade in the year 2015

	----- Change from the baseline values in the year 2015 -----							
	Production		Imports		Exports		Consumption	
	Volume 1/ (000 t)	% 2/	Volume 1/ (000 t)	% 2/	Volume 1/ (000 t)	% 2/	Volume 1/ (000 t)	% 2/
China								
Wheat	362	0.4	123.8	2.6	-0.4	-0.1	465	0.5
Rice	-43	0.0	-4.1	-0.4	7.7	1.5	-60	0.0
Coarse grains	2800	1.7	663.6	11.9	-101.4	-8.4	3430	2.0
Oilseeds	134	0.4	1307.5	2.6	-0.3	-0.1	1441	1.7
Oilmeals	1093	1.9	1736.4	961.7	-	-	2829	5.0
Veg oils	330	1.9	3607.2	48.5	-0.5	-0.9	3937	16.1
Beef and veal	1285	11.0	-0.5	-2.9	0.0	-0.1	1286	11.0
Pigmeat	4696	7.5	32.6	13.9	-21.6	-4.4	4751	7.6
Poultry meat	669	4.1	143.2	14.5	-34.2	-7.3	846	5.0
Sheepmeat	428	9.6	-0.3	-1.5	-	-	428	9.6
Butter	12	8.4	-0.4	-1.1	-0.2	-100.0	13	7.2
Cheese	29	7.7	0.0	0.1	0.3	42.5	30	7.4
SMP	21	13.5	-6.4	-7.1	-	-	15	6.0
WMP	103	9.8	58.6	33.4	-	-	161	13.5
India								
Wheat	3632	4.1	119	9.3	0	0.0	3759	4.2
Rice	2494	2.4	0	0.0	-303	-8.6	2794	2.8
Coarse grains	1004	2.5	2	2.0	2	1.3	1013	2.5
Oilseeds	5	0.0	0	0.0	0	0.0	45	0.3
Oilmeals	31	0.3	0	-	-353	-12.6	384	4.6
Veg oils	12	0.3	622	8.5	0	-	635	5.4
Beef and veal	58	1.6	0	-	-82	-13.0	140	4.5
Pigmeat	-24	-4.1	0	-	23	133.7	33	5.9
Poultry meat	88	2.7	258	1684.3	0	0.0	347	10.7
Sheepmeat	24	2.6	0	-	0	-0.1	24	2.8
Butter	461	10.9	0	-	0	-7.8	461	10.9
Cheese	0	-	0	-	0	-	-	-
SMP	30	9.3	0	-	9	37.4	21	7.0
WMP	0	-	0	-	0	17.6	-	-

1/ Difference (in 000 tonnes) between high income growth scenario and baseline.

2/ Change under high income growth scenario as percentage of the baseline value.

- indicates either missing values or negligible impact.

Source: COSIMO simulations, 2006. FAO.

20. In the case of China, the impact of higher income growth is negligible for the two cereals (wheat and rice). This mainly reflects the very low, and negative in the case of rice, income elasticity for these staples. The impact on feed utilization (coarse grains and oilmeal) is also modest but not negligible (about six million tonnes of extra utilization of the two products together). Over 60 percent of the additional consumption is met by extra domestic production, and thus the trade impact is smaller. The impact of higher income growth is more notable in the case of vegetable oils, with extra consumption of about four million tonnes, or 16 percent more than in the baseline. As oilseeds production capacity is limited, almost all (92 percent) of this extra demand is imported. Hence, the trade impact is significant. For the four types of meats covered, and taken together, a two percentage point increase in income leads to 7.6 percent additional consumption. Some 70 percent of this extra demand is for pigmeat. In contrast to vegetable oils, 97 percent of the extra demand for meats is met from domestic production. Thus, trade impact is

very small. Finally, the results show an 11 percent rise in the consumption of dairy products, mostly milk powder. About a quarter of the additional demand is met by imports and the rest from production.

21. In the case of India, a two percentage point higher income growth was found to lead to a 3.5 percent increase in demand for cereal foods (wheat and rice), unlike the case of China. However, the impact on trade is very small as over 90 percent of the extra demand is locally produced, while the change in net import amounts to about half a million tonnes. The impact of higher income growth on feed utilization (coarse grains and oilmeal) is also relatively low. However, India's oilmeal exports fall by 12 percent as more oilmeal is utilized locally. In the case of vegetable oils and oilseeds, although the impact on demand is fairly small (2.4 percent), imports rise by 8.5 percent (622 000 tonnes of oils) reflecting India's substantial consumption of oils. Meat consumption rises by an additional 7 percent. However, the overall impact on trade is modest, perhaps with the exception of an additional import of poultry meat of 258 000 tonnes. Lastly, for dairy products, although the model does not cover all traded products, it shows an extra 11 percent increase in the demand for butter. As this is mostly produced locally, the impact on trade is very small.

22. In summary, the simulation results are largely consistent with the expectation that higher income growth has little consumption and trade impact on cereal foods, but a fairly strong impact on meats and feeds. The impact on trade – which is the main conduit through which other countries are affected – differs from commodity to commodity, depending on domestic production capability. Where increased demand does not lead to more imports, as with meats for example in the case of China, there is little implication for trade with the rest of the world. Vegetable oils are an exception for both countries as the trade impact is significant. These results are based on a comparison between the baseline and scenario results. The baseline itself could change for a variety of other reasons, e.g. production shocks, policies etc., which could lead to significant trade impact in conjunction with higher income growth.

III. CONCLUSIONS

23. This paper has reviewed trade statistics and relevant studies for understanding the implications of the rapid economic growth of China and India – the new Asian Drivers – for global agricultural commodity markets as well as trade opportunities and challenges. This subject has been attracting increasing international interest. Projecting outcomes for the future based on recent trends is fraught with uncertainties in view of the rapidity of the change in some key variables like income and trade. As an example, China's total agricultural import doubled in just three years between 2002 and 2004, something no model could reasonably project even in 2001.

24. In view of this, the observations made in the paper are at best preliminary and subject to further and continued analysis. The emerging trends so far show that import demand from the Asian Drivers has been most dynamic for three broad categories of agricultural products: agricultural raw materials such as cotton and rubber; livestock feeds; and vegetable oils and oilseeds. Further income growth in the two countries will continue to increase imports of livestock feeds and oilseeds and vegetable oils to meet domestic consumer demand. The rapid growth in imports of agricultural raw materials is driven, on the other hand, by booming exports of manufactured products such as garments, leather products (footwear, bags etc.) and other agro-manufactures. Consumer demand and trade openness in other countries will influence these trends in large part. In the case of some basic foods, notably cereal foods like rice and wheat, analysts hold that further income growth would not have much impact on trade in view of the low income elasticity of demand for these products.

25. As stressed above, a great deal of caution needs to be exercised in reading these trends for policy purposes, for example in considering a potential bilateral trade agreement with the Asian Drivers. Alternative scenarios are not implausible. For example, many analysts hold that the current pattern and level of trade in cereals of the Asian Drivers do not reflect their comparative

advantage between land-intensive and labour-intensive production and trade, but are influenced by the government policy of maintaining a high degree of self-reliance in cereals. This could change in the future, and open more trade opportunities in cereals. But this could come at the cost of increased competition at home and in third-country markets in labour-intensive products like fruit and vegetables as well as various food preparations. Likewise, the Asian Drivers' current high import growth of agricultural raw materials could slowdown if the rest of the world tightens its imports of clothing, leather products and other agro-manufactures, or if consumer demand falls for other reasons.

26. Given the economic weight of the Asian Drivers, the impact of these trends and developments on global markets and trade will be marked. This impact will be felt differently, in terms of both opportunities and challenges, by different countries depending on their trade patterns, resource endowments and comparative advantages. As a minimum, this calls for individual countries to initiate a process of analysis and discussion on how best to respond to the developments.

27. An emerging trend is the desire on the part of many countries to foster closer economic links with the Asian Drivers through bilateral trade agreements. Where a bilateral agreement is sought primarily for trade reasons, decision makers need answers to many questions concerning the nature of the agreement, such as the coverage of various sub-sectors (e.g. what commodities to include and what to exclude), how much reciprocity to offer in market access, what other provisions like safeguards and investment to cover, and so on. Such an analysis is further complicated because many countries are already members of one or more bilateral or regional trade agreement, as well as members of the WTO. However, little is known about the likely gains and losses from such agreements. Building capability in trade policy analysis should thus be a high priority. It is also one area where international organizations like FAO can contribute technical analyses and advice.

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