

List of Figures

Figure 1.1	Location of Study Sites	4
Figure 2.1	Beer Supply Chain and the Bullwhip Effect	11
Figure 2.2	Sales Volume and Share of Traditional and Modern Groceries	16
Figure 2.3	Thailand Rice Cluster	27
Figure 2.4	Dualistic Structure of the Thai Vegetable Value Chain	29
Figure 2.5	Percentage Increase of Those Willing to Buy Safe Vegetables at High prices, by Income Group	32
Figure 2.6	Survey of Chemical Residuals of Fresh Vegetables in 2016, by Type	33
Figure 2.7	Survey of Chemical Residuals of Fresh Vegetables in 2016, by Standard and Marketing Channel ^a	33
Figure 2.8	<i>Pumpuang</i> Mobile Market and Ready-to-eat Vegetables Sold in Convenience Stores	34
Figure 2.9	Ohkajhu Restaurant Chain	37
Figure 2.10	Thailand Export Value of Fresh Fruits and Vegetables (1990–2016)	38
Figure 2.11	Vertical Structure of the Thai Broiler Value Chain	40
Figure 2.12	Broiler Industry Export Growth and Shocks	42
Figure 2.13	Thailand's Feed Imports (top) and Exports (bottoms) (1961–2013)	43
Figure 2.14	Evaporative Cooling System Housing	44
Figure 2.15	Bird Flu Outbreaks in Thailand	45
Figure 3.1	Map of Research Site	54
Figure 3.2	Main Indicators Applied in the Value-added Analysis	57
Figure 3.3	Planted Area, Productivity, and Paddy Output	58
Figure 3.4	Structure of Rice Production Areas, by Rice Variety in Lao Cai	61
Figure 3.5	Seng Cu Rice Value Chain	62
Figure 3.6	Input and Output Markets of Seng Cu Rice Producers in Lao Cai	65
Figure 3.7	Seng Cu Rice Production Cost and Its Components in Two Ecological Zones	66
Figure 3.8	Input and Output Marketing of Large Collectors in the Seng Cu Rice Chain	69
Figure 3.9	Marketing Channels of Seng Cu Rice in Lao Cai	78
Figure 3.10	The Composition of the Product Generated for Each Actor in the Short Channel in the Uplands (on the left) and Lowlands (on the right) (Channels 1 and 2)	82
Figure 3.11	Composition of Product Generated for Each Actor in the Long Channel in the Uplands (Channel 3)	82
Figure 3.12	The Composition of Product Generated for Each Actor in the Long Channel in the Lowlands (Channel 4)	83
Figure 4.1	Basic Actors and Stakeholders in the Milk Chain	98
Figure 5.1	Milk Production and Consumption in Malaysia	116
Figure 5.2	Per Capita Consumption of Milk in Malaysia	117
Figure 5.3	Balance of Trade for Milk and Dairy Products (2013–2017)	118
Figure 5.4	Classification of Dairy Farms in the Southern Zone of Peninsular Malaysia	125
Figure 5.5	Distribution of Dairy Farms in the Southern Zone of Peninsular Malaysia	125
Figure 5.6	Marketing Channel of Raw Milk in the Southern Zone	127

Figure 6.1	Number of Retailers in Indonesia	136
Figure 6.2	Fish Supply Chain Model of Tuna and Tuna-like in Bitung City	138
Figure 6.3	The Regulation Aspects of Food Policy in Indonesia	139
Figure 6.4	Indonesian Fish Production Profile	140
Figure 6.5	Variation of Indonesian Fish Products, 2014	141
Figure 6.6	Indonesia Per Capita Fish Consumption	142
Figure 6.7	Indonesia Per Capita Fish Consumption, 2015	142
Figure 6.8	Trends in Indonesia's Fish Export and Import, 2010–2017	143
Figure 6.9	Value and Volume of Indonesia's Fish Export, 2010–2017	143
Figure 6.10	Distribution of Fishing Ports in Indonesia Based on Class, 2015	144
Figure 6.11	Structure of Fishing Vessels in Indonesia's Capture Fishery Industry, 2014	145
Figure 6.12	Main Locations of Fish Production (2012) and Fish Processing Unit (2014)	146
Figure 6.13	Lobster Supply Chain Model at the Southern Coast of Java	149
Figure 6.14	Anchovy Supply Chain Model in Medan City, North Sumatra	151
Figure 6.15	Indonesia's Seaweed Production	152
Figure 6.16	List of Main Importing Markets for Seaweed Product (HS Code 121221) Exported by Indonesia in 2017	154
Figure 6.17	Export Trend of Seaweed Selected Product (HS Code 121221) from Indonesia, 2013–2017	154
Figure 6.18	Seaweed Supply Chain Model in Makassar, South Sulawesi	155
Figure 6.19	Fish Supply Chain Model at Traditional Market in Yogyakarta City	157
Figure 6.20	Fish Supply Chain Model of Tuna and Tuna-like in Bitung City	159

List of Tables

Table 1.1	Study Sites in Each Chapter	3
Table 2.1	Comparison between the Traditional and Modern Supply Chains in Thailand	14
Table 2.2	Number of Farmer Groups and Cooperatives by Type (2013–2017)	23
Table 2.3	Factors Affecting the Outcome of Value-adding Activities	24
Table 2.4	Factors Affecting the Outcome of Loss Reduction Activities	25
Table 2.5	Input Supply Efficiency of Rice Value Chains in CLMV	26
Table 2.6	Effect of Clustering on Provincial Value Added of Rice (Model 1. Pooled OLS)	28
Table 2.7	Effect of Clustering on Provincial Value Added of Rice (Model 2. Pooled OLS)	28
Table 3.1	Number of Farmers in the Household Survey in the Research Site	55
Table 3.2	Number of Other Actors Selected for the In-depth Interviews	56
Table 3.3	Main Characteristics of Rice Producers in Upland and Lowland of Lao Cai	63
Table 3.4	Cost–Benefit Analysis of Seng Cu Rice Producers in Lao Cai	68
Table 3.5	Average Cost and Revenue of a Large Collector in Lao Cai, 2017	70
Table 3.6	Comparison of the Level of Exploitation of Rice Products among Key Marketing Actors in the Chain	72
Table 3.7	Cost and Benefit of the Tien Phong Cooperative in 2017 (Lowland)	73
Table 3.8	Cost and Benefit of Muong Khuong Cooperative in 2017 (Upland)	74
Table 3.9	Constraints in the Seng Cu Rice Value Chain in Lao Cai	77
Table 3.10	Value-added Analysis of Short Channels in Uplands and Lowlands	80
Table 3.11	Value Added Analysis of the Long Channel in Upland Areas	81
Table 3.12	Value Added Analysis of the Long Channel in Lowland Areas	81
Table 4.1	Natural Conditions of the Study Sites	88
Table 4.2	Total Yield of Dairy Cows and Milk	92
Table 4.3	Dairy Cows in Moc Chau, 1976–1980	93
Table 4.4	Milk Production in Ha Nam Province, February 2017	94
Table 4.5	Interviewees' Personal Information	96
Table 4.6	Production Scale of Surveyed Farms	97
Table 4.7	Productivity of Surveyed Farms	97
Table 4.8	Number of Dairy Farms in Moc Chau District, Son La Province, Buying Inputs from Moc Chau Milk	100
Table 4.9	Input Suppliers in Ly Nhan and Duy Tien Districts, Ha Nam Province	101
Table 4.10	Availability and Input Prices	101
Table 4.11	Dairy Farms Signing Contracts With and Receiving Support from Input Suppliers	102
Table 4.12	Number of Dairy Farms Signing Contracts with Milk Collectors	103
Table 4.13	Interviewees' Educational Level and Dairy Farming Experience	104
Table 4.14	Agricultural Land of Surveyed Farms	105
Table 4.15	Linkages between Dairy Farmers and Dairy Plants	106
Table 4.16	Number of Dairy Farms Contracting with Milk Companies	107
Table 4.17	Relationship among Farmers, Moc Chau Milk, and Local Authorities	107
Table 4.18	Farms Having Linkages with Relevant Stakeholders	109

Table 4.19	Farm's Costs and Benefits	111
Table 4.20	Value-added Distribution along the Fresh Milk Chain	112
Table 5.1	Malaysia Developmental Policies on the Dairy Sector	120
Table 5.2	National Agricultural Policies	123
Table 5.3	Respondents of the Study	124
Table 5.4	Types of Milk and Dairy Products Distributed in the Southern Zone of Peninsular Malaysia	126
Table 5.5	Marketplace and Average Ex-farm Price of Fresh Milk	129
Table 5.6	Ex-farm Prices of Yoghurt	130
Table 5.7	Ex-farm Price for Flavoured Milk and Ghee	130
Table 6.1	Growth Trend of Modern Retail Market in Indonesia	137