
Asian Cooperation in Natural Rubber: 50 Years of ANRPC

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One of the prominent intergovernmental organisations in plantation sector, the Association of Natural Rubber Producing Countries (ANRPC) has completed 50 years since its inception in October 1970. Currently, the ANRPC has representation of 13 natural rubber (NR) producing countries which together account for around 93 per cent of world NR production. The main objective of the Association has been formulating coordinated marketing systems for NR so as to ensure fair and remunerative prices for the produce. This article critically reviews the origin, evolution and performance of the Association and its challenges and prospects. The coordinated/joint marketing systems for NR, as visualised and planned at the time of the establishment of the Association, could not be materialised so far. However, the presence of the Association has been influencing the formulation of strategies and policies having a bearing on NR and related sectors at domestic and multilateral levels. Commodity based intergovernmental organisations like ANRPC have been confronting challenges on account of trade policy related, structural and industry specific developments. The strategic significance of NR as an indispensable industrial raw material and the status of the Association as the only intergovernmental forum of NR producers signify the necessity of the Association to carry on its activities, but redefining its role and prioritising its functions in the emerging context.

Keywords: *Natural rubber, intergovernmental organisation, fair and stable rubber prices, technical cooperation, challenges and prospects.*

While addressing the inaugural session of the intergovernmental forum, the Association of Natural Rubber Producing Countries (ANRPC) on 14 October 1970 at Kuala Lumpur, the then Prime Minister of Malaysia, Honourable Tun Haji Abdul Razak bin Hussein stated that the establishment of the Association symbolised the desire of its Member Countries to bring about concerted action for achieving stability in the price of natural rubber (NR). The commercially cultivated rubber trees of the species of *Hevea brasiliensis* in Asia defoliated and refoliated 50 times in wintering since then, but the price of NR is still unstable and remains as the main agenda of deliberations

at ANRPC forums.

ESTABLISHMENT AND MEMBERSHIP

The Government of Malaysia took the initiative to organise a Conference of Natural Rubber Producing Countries from 2 to 4 October 1967 at Kuala Lumpur which was attended by six producing countries viz., Sri Lanka, Indonesia, Liberia, Malaysia, Thailand and Vietnam. Singapore also attended the Conference mainly on account of its rubber trading interests, being the then major transshipment port for exporting the material to London and other destinations

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from South East Asia. The two major proposals agreed in the Conference were:

- (i) establishment of an intergovernmental association of NR producing countries, and
- (ii) formulation of a Joint Marketing System (JMS).

The Conference was followed by meetings at official level and exchanges at diplomatic level, leading to the finalisation of the constitution of ANRPC by May 1968. The Constitution came into force on 8 April 1970, the date on which the governments of Sri Lanka, Indonesia, Malaysia and Thailand deposited the instruments of accession. Vietnam acceded to the Association in May 1970 (withdrew its membership in January 1984 but rejoined in October 1996). The first Assembly of the Association was held in October 1970 and Kuala Lumpur was decided as the seat of its Secretariat, to be hosted by the Government of Malaysia, the country which had a share of around 40 per cent of global NR production then. The governments of Cambodia, India, Ivory Coast, Liberia and Nigeria had attended the first Assembly as Observers.

The governments of Singapore, India and Papua New Guinea acceded to the Association in May, August and November 1975 respectively. The membership of the Association got a boost when the Government of China acceded in June 2007, followed by the governments of Cambodia in September 2009, Philippines in April 2010, Bangladesh in October 2017 and Myanmar in September 2018. Thus, currently the ANRPC has representation of 13 NR producing countries which together account for around 93 per cent of world NR production. However, the Association remains Asian as none of the Latin

American or African NR producers joined the intergovernmental forum so far, irrespective of repeatedly extended invitations.

The main objectives of the Association are:

- (i) bringing about coordination in the production and marketing of NR,
- (ii) promotion of technical cooperation, and
- (iii) bringing about fair, stable and remunerative prices for NR.

CONTEXT

It is important to have a glance on the context in which the Association was conceived and born to assess its role and worth over the last 50 years, judged against its core objectives.

- The earlier international arrangements during 1910s and 1920s for stabilising the price of NR were formulated and operated by grower associations, dominated by Western planters. The first formal intergovernmental arrangement was International Rubber Regulation Agreement (IRRA) of 1934 agreed to in the context of prolonged slump in NR prices from late 1920s, bred by the Great Depression. All these erstwhile international arrangements aimed at stabilising the NR prices through trade and production restrictions.
- The low and unstable NR prices gave way to steep rise in prices and shortage in supply of the material for Allies during the Second World War due to the occupation of South East Asian regions by Japan in pursuit of tin, rubber and oil. This led to reverse in rubber policy towards intensive harvesting and vigorous promotion of planting. Further,

huge investments took place in synthetic rubber (SR) research and manufacturing in the US under state patronage, coordinated by the Rubber Reserve Company (RRC) formed under the direct orders of President Franklin D. Roosevelt in June 1940.

- During the post-war period, several developments took place having a bearing on the prospects of the NR plantation sector.
 - Independent governments replaced the former colonial governments in several NR producing countries.
 - The whatsoever multilateral arrangements in primary commodities during the colonial era got expired and the forums set up to implement them were relegated to the status of statistics pooling and disseminating agencies.
 - By this time, the ownership of rubber plantations shifted to a large extent from Westerners to indigenous planters, leading to national interests in the sector.
 - The share of smallholdings in total rubber planted area had also increased significantly, bringing socioeconomic and livelihood issues to the forefront.
- More than 90 per cent of NR produced was exported by all producing countries during the 1960s with the sole exception of India where consumption of the material had surpassed domestic production as early as in 1947. Further, foreign exchange earnings from the export of NR were quite substantial in absolute and relative terms for the major exporting countries and critical to finance their essential imports and ease

balance of payment situation. The share of NR in total export earnings in Malaysia, Indonesia and Thailand was around 35 per cent, 23 per cent and 14 per cent respectively in 1970 and understandably, the NR sector issues were handled at the highest political level in these countries.

- Commodity trade was neglected in the post Second World War multilateral economic pact agreed in July 1944 which established the Bretton Woods institutions of International Monetary Fund (IMF) and World Bank but missed the formation of an international institution for trade. The Havana Charter of 1948 which provided for the establishment of an International Trade Organisation (ITO) and also had an exclusive chapter on intergovernmental commodity agreements could not be implemented and the interim arrangement of the General Agreement on Tariffs and Trade (GATT) 1947 did not have definitive provisions on primary commodity trade and price stabilisation.

However, the triggering factors which prompted the producing countries to deliberate and agree on an intergovernmental forum were mainly the low NR price situation towards the mid-1960s and the competition from SR. NR prices had remained in a comfortable zone during 1940s and 1950s, supported by defence requirements of the Second World War and industrial expansion thereafter. The prolonged low NR price situation from mid-1960s was attributed to low price of SR on account of low oil prices, surplus situation in SR sector, increasing replacement of NR by SR in many end uses and unfair trade practices, especially by middlemen.

FAIR AND STABLE NR PRICES

Fair and stable NR prices have been the focal point of discussions at ANRPC forums from its inception. The Conference of Natural Rubber Producing Countries in October 1967 had prioritised the formulation of a JMS for NR trading, pending the establishment of the ANRPC, and formed a Working Party to draft a concept paper on the topic. Honourable Prime Minister of Malaysia in his inaugural address in October 1970 had visualised “*an emporium or some form of a super market where the buyers of NR all over the world could be encouraged to come and shop for their specific needs*” and urged the Member Countries for immediate and concrete action on JMS. The first Assembly of the Association agreed in principle to the establishment of a JMS for NR and appointed a Working Party to study the mechanics and procedures. The JMS was expected to benefit NR producing and consuming interests through economies in production, marketing, shipping and communication and by minimising the role of middlemen.

ANRPC had sent delegations to major producing countries viz., Malaysia, Indonesia and Thailand to study the existing marketing systems of NR so as to source inputs for working out the mechanics and procedures for the agreed JMS. The NR trading regimes existing in Member Countries varied considerably upsetting the formulation of a JMS easily. Further, it was also difficult to break the domestic and cross border trade channels, developed historically involving major traders, brokers, shippers and dominant consumers.

Other developments which softened the action towards JMS were the increase in NR prices during 1970s and furtherance of the deliberations under the auspices of the

UNCTAD for commodity based trade agreements. The increase in NR prices during the 1970s was mainly in correspondence with the increase in SR prices due to hike in oil prices resulting from the OPEC and oil embargo related developments. The developments at the UNCTAD led to deliberations at the ANRPC for an international agreement with a buffer stocking system for stabilising NR prices, culminating into the formulation of the International Natural Rubber Agreement on Price Stabilisation (INRAPS) which was adopted by the governments of Indonesia, Malaysia, Singapore, Sri Lanka and Thailand by November 1976 but never implemented.

INTERNATIONAL NATURAL RUBBER AGREEMENTS (INRAS)

The INRAs of 1979, 1987 and 1995 were negotiated and reached under the Integrated Programme for Commodities (IPC) of the UNCTAD. Commodity issues had been discussed in UNCTAD from its First Session in 1964 where the principles as laid out in Chapter VI of the Havana Charter on intergovernmental commodity agreements formed the basis. The Second Session of the UNCTAD in 1968 called for an integrated commodity policy to be embodied in a general commodity agreement and also proposed a Central Fund for financing commodity operations. However, developed countries argued for case by case approach and were not favourable to the proposed Central Fund and much progress could not be achieved. Meanwhile, commodity based international agreements were reached on sugar in 1968 and cocoa in 1972, but they were not components of an integrated programme as originally visualised by the UNCTAD (International Wheat Agreement was reached

in 1949 and International Tin Agreement was negotiated in 1954 before the establishment of the UNCTAD). The UNCTAD proposed an Integrated Programme for Commodities (IPC) involving internationally owned stocks, multilateral commitments between buyers and sellers and establishment of a common financing fund which was adopted at the Fourth Session of the UNCTAD in May 1976 at Nairobi.

The International Natural Rubber Agreement (INRA) concluded in 1979 was the first commodity agreement to be set up within the framework of the IPC and the Agreement came into force provisionally on 23 October 1980 and definitively on 15 April 1982. The International Natural Rubber Organisation (INRO) was set up to implement the provisions of the Agreement with headquarters at Kuala Lumpur, Malaysia. The INRA had a price band with a reference price and upper and lower intervention prices. The Agreement had also provided for an internationally established normal NR buffer stock of 400 000 tonnes and a contingency buffer stock of 150 000 tonnes for market interventions. The indicator price called, Daily Market Indicator Price (DMIP), was a composite weighted average of daily official current month prices of three grades of NR (RSS1, RSS3 and TSR 20) in Kuala Lumpur, London, New York and Singapore markets with all quotations converted into FOB Malaysia/Singapore ports in Malaysian/Singapore currencies. The first Agreement covered seven NR exporting countries and 25 importing countries, thereby accounting for 95 per cent of exports and 75 per cent of imports worldwide. Among the major NR producing countries, India was not a signatory to the INRA as it had a more or less protected domestic NR market and as it was not an exporter. Two

more subsequent INRAs were reached in 1987 and 1995.

The major ANRPC Member Countries had actively participated in the negotiations which led to the formulation of the INRA and establishment of the INRO. The Member Countries largely depended on the INRAPs for proposing the provisions of the INRA. The ANRPC served as a forum for the NR producing countries to consolidate their views and stand on the formulation of INRA. Consultations in ANRPC on the INRA continued in the form of the ANRPC Standing Committee on INRO matters which used to sit in deliberation prior to the meetings of the INRO. Thus, it can be surmised that though JMS never took place, the ANRPC had its impact on the deliberations on the launching of the INRA and functioning of the INRO thereafter. The coordinated marketing system (CMS), multilateral initiatives to influence NR prices, industrial pricing in the sense of cost based price with long-term contracts and regional rubber market remained in the agenda of ANRPC, coming to the fore during slumps in prices and getting back when the prices improve. INRA 1979 was perceived to be generally effective and INRA 1987 was assessed as partially helpful. The inadequacies of INRA 1987 had led to renewed discussions on coordinated action in NR market at ANRPC especially during early 1990s.

Collapse of INRA and thereafter

The INRA 1995 could not survive as major NR exporting countries withdrew from the INRO by September 1999 leading to the collapse of the Agreement and the organisation. The withdrawal of the exporting countries was due to the refusal by the importing countries for reference price revision in the context of

the South East Asian financial crisis. The indicator price under INRA, measured in Malaysia/Singapore currencies, had gone up on account of sudden and sharp devaluation of local currencies but real price declined in terms of US Dollar.

Dissatisfaction over the indolence of the INRO during the currency turmoil led to renewal of stern discussions on CMS once again at ANRPC by 1998. This time, the studies and deliberations focussed on the possibility of a regional futures market along with CMS. The deliberations did not succeed much and Malaysia, Indonesia and Thailand agreed to form an International Tripartite Rubber Council (ITRC) and subsequently International Rubber Consortium (IRCo) Ltd based in Bangkok, Thailand following a Joint Ministerial Declaration on 8 August 2002 at Bali, Indonesia. This event was officiated by the premiers of the three countries, reflecting the continued economic and political importance of the commodity in their domestic sectors. The ITRC/IRCo proactively went ahead with announcing measures such as Agreed Export Tonnage Scheme (AETS) and Supply Management Scheme (SMS) involving export and production restrictions. Thailand hosted a Special Session of the ANRPC Assembly at Ministerial Level in April 2005 at Chiang Mai which was officiated by none other than the then Prime Minister H.E. Dr Thaksin Shinawatra who in his Opening Address invited other Member Countries of the ANRPC to partake in ITRC activities. However, the initiative even today continues as tripartite.

From the turn of 2002, the NR prices recovered and remained in a more or less comfortable zone for more than a decade with intermittent short-lived high and low prices. However, NR sector has been confronted with relatively low and unstable prices during the

recent years. The slump in NR prices again brought the “remunerative and stable price” agenda to the forefront in ANRPC forums. As per the Joint Press Communiqué of the last Special Session of ANRPC Assembly at Ministerial Level held on 8 May 2015 at Kuala Lumpur, presided over by Honourable Datuk Amar Douglas Uggah Embas, the then Minister of Plantation Industries and Commodities, Government of Malaysia, the Member Countries reaffirmed the NR producers’ collective commitment and solidarity under the framework of the Association towards strengthening NR prices. As a follow-up action, an Expert Group on NR Price Stabilisation was formed in October 2015 which met several times but no concrete action plan at multilateral level could be reached. Another Task Force on Alternative Mechanisms to Solve Rubber Price Problem in Short Term Period was established in October 2019 which also met several times without any tangible outcome.

TECHNICAL COOPERATION

Another objective of the Association was to foster technical cooperation among Member Countries. In the sphere of technical cooperation, the ANRPC has notable contributions, especially during the initial decades of its inception. The main areas of technical cooperation were rubber clone exchange, collective action against plant diseases, matters related to technical standards, latex protein allergy related aspects, promoting the environmental properties of NR and consolidation and dissemination of statistics.

The International Rubber Research and Development Board (IRRDB), another international forum of research institutions in various countries engaged in research on rubber and related aspects existed from 1960

[merging International Rubber Research Board (IRRB) and International Rubber Development Committee (IRDC) established in 1937]. Research institutes of most of the Member Countries of ANRPC are represented in the IRRDB. This eventually led to leaving technical cooperation in rubber research largely to the Board especially after the shifting of its headquarters from London to Kuala Lumpur two decades back. However, the IRRDB is not intergovernmental and hence multilateral action at government level cannot be formulated and implemented. Hence, the ANRPC is looked upon whenever research and development issues have to be handled multilaterally at government level.

Collection and dissemination of NR statistics remain as the mainstay of the ANRPC. The Association has been promoting information consolidation and exchange through various seminars, conferences and workshops. The Annual Rubber Conference held in conjunction with annual meetings of the Association from 2008 (except in 2020 due to Covid-19) is looked upon as an important forum for discussing NR updates and networking among industry players and policy-makers.

CHALLENGES AND PROSPECTS

Commodity based intergovernmental organisations have to redefine their roles on account of policy related, structural and industry specific developments and ANRPC is no exception.

- The relatively high tempo of globalisation limited the scope for multilateral commodity specific initiatives in general. The establishment of the World Trade Organisation (WTO) and its set of sector-wide multilateral trade agreements covering

the whole realm of commodities and the plethora of regional and bilateral economic and trade agreements made the scope for commodity specific initiatives limited. It is indispensable that the commodity specific initiatives deliberated and formulated shall not breach the commitments of Member Countries under other multilateral, bilateral and plurilateral agreements.

- In the major NR producing and exporting countries like Malaysia, Indonesia and Thailand, the status of the sector as one of the major export earners has corroded with other secondary and tertiary sectors taking the lead. The share of NR in total export earnings in Malaysia, Indonesia and Thailand had declined to 0.37 per cent, 1.99 per cent and 1.64 per cent respectively in 2019. However, the number of people depending on NR for their livelihood increased considerably because of expansion of area under cultivation, adoption of the crop by smallholders and fragmentation of holdings over time.
- The role of private sector in the domestic NR sectors of the Member Countries has also widened and ANRPC being intergovernmental does not formally involve private sector. The Public-Private Meet held along with the annual meetings of the Association from 2015 for private sector involvement had been inconspicuous mainly due to the absence of major private sector players.
- There has been an innate desire for some of the Member Countries from the very beginning to act like a producers' cartel in the fashion of

OPEC. But the dominance of SR in elastomer consumption from the early 1960s diminished or rather eliminated any chance for such restrictive supply management strategies to influence NR prices. Currently, the SR:NR ratio in gross elastomer consumption is 53:47.

- During the last two decades, the role of derivatives has significantly increased in commodity markets. NR futures have been actively traded in Shanghai, Tokyo (presently in Osaka Exchange) and Singapore commodity exchanges and also in the domestic exchanges of producing countries like Malaysia, Thailand and India. Apart from hedging and speculative trading, the exchange prices are widely adopted as reference prices for settling physical trade in NR, especially the direct trade between major consumers and exporters based on long-term contracts. Thus, the NR markets have become more sophisticated over time and it is not easy to influence prices through multilateral market intervention initiatives.
- Another major challenge to the role of ANRPC is the changing status of its Member Countries from primary commodity exporters to major rubber product manufacturers, testing the identity of the organisation. The share of ANRPC Member Countries in world NR consumption had increased from 4 per cent in 1970 to 22 per cent in 2006. In 2007, the largest NR consumer China joined the Association and the combined share of ANRPC Members in world rubber consumption in 2019 was 65 per cent. Six of the ten countries ranked for the highest NR consumption

are Member Countries of ANRPC. On account of this, the Association finds it difficult to focus exclusively on the problems and prospects of NR production sector alone.

- The differences in structural dimensions across NR sectors of the Member Countries make it often difficult to formulate a common strategy for market interventions. Major exporting countries often suggest restrictions in planting, production and export to influence NR prices. But for net NR importing countries such as China, India and Sri Lanka, such options are not agreeable. Similarly, there are also countries with emerging rubber plantation sectors which have expansion programmes in rubber plantation sector and generally these countries are low cost producers of NR.

ANRPC TO CONTINUE

There have been speculations on the need and role of ANRPC in the present context among stakeholders and governments time and again. It is true that the sphere of activities of commodity based intergovernmental organisations has shrunk over time. Whenever NR prices move out of a secure zone, discussions on multilateral initiatives to influence prices take the forefront. But, it is not easy to formulate any concrete action plan acceptable to all Member Countries for implementation on account of the present context, structure of its membership and other developments. However, the discussions on market interventions and restrictions on production and trade would continue as the crop is politically important for the ruling governments in major producing countries.

ANRPC draws its significance mainly from the prospects of NR as an indispensable industrial raw material. There are products in which only NR can be used and there are many other products in which combinations of NR and SR give better properties and performance. The US and China are reported to have strategic reserves of NR considering its importance as a critical raw material. Further, NR is the only agricultural product in the List of Critical Raw Materials of the European Union.

It may not be easy to quantify the contributions of the Association to the development of the NR sector in the member countries in solid terms but the presence of the Association has been influencing the formulation of strategies and policies having a bearing on NR and related sectors at domestic and multilateral levels. The ANRPC is the only intergovernmental forum of countries producing NR and its continuance is crucial on economic, political and diplomatic reasons. The Association is the forum to facilitate formal networking among policy-makers in the domestic sectors of major NR producing countries. ANRPC is also perceived to be the most reliable source of statistics and information on NR sector. Further, this is the only forum which can represent NR producers in other international bodies. Hence, the Association shall continue to serve the NR and related sectors but redefining its role and prioritising its functions are also important.

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