Launch Workshop of the Agricultural Transformation and Market Integration in the 
ASEAN Region: Responding to Food Security and Inclusiveness Concerns

7-8 October 2016
SEARCA
Los Baños, Laguna
Philippines

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Acronyms

ABF  ASEAN Business Forum
ACEDAC/ASEWGAC  ASEAN Centre for the Development of Agricultural Cooperatives / ASEAN Sectoral Working Group on Agricultural Cooperatives
ADB  Asian Development Bank
AEC  ASEAN Economic Community
AEM  ASEAN Economic Ministers
AFA  Asian Farmer’s Association
AFCC  ASEAN Multi-Sectoral Framework on Climate Change: Agriculture and Forestry towards Food Security
AFSIS  ASEAN Food Security Information System
AFSP  ASEAN Food Safety Policy
AFSRB  ASEAN Food Security Reserve Board
AIFS  ASEAN Integrated Food Security Framework
AIIB  Asian Infrastructure Investment Bank
AMAF  ASEAN Ministers of Agriculture and Forestry
AMS  ASEAN Member States
APAARI  Asia Pacific Association of Agricultural Research Institutions
APTCS-FSBD  ASEAN Plus Three Comprehensive Strategy on Food Security and Bioenergy Development
APTCS-FSBD  ADF+3 Comprehensive Strategy on Food Security and Bioenergy Development
APTERR / APTERR+3  ASEAN Plus Three Emergency Rice Reserve
ASC  ASEAN Seed Council
ASCC  ASEAN Socio Cultural Community
ASEAN  Association of Southeast Asian Nations
ASEAN-CCI  ASEAN Chamber of Commerce and Industry
ASEC  ASEAN Secretariat Asia
ASFCC  ASEAN-Swiss Partnership on Social Forestry and Climate Change
AsiaDHRRA  Asian Partnership for the Development of Human Resources in Rural Asia
ASWGAC  ASEAN Sectoral Working Group on Crops
ASWGFi  ASEAN Sectoral Working Group on Fisheries
ASWGL  ASEAN Sectoral Working Group on Livestock
ATIGA  ASEAN Trade in Goods Agreement
ATM/ATMI  Agricultural Transformation and Market Integration
ATWGRARD  ASEAN Technical Working Group on Agricultural Research and Development
AVP  audio-visual presentation
CARP  Comprehensive Agrarian Reform Program
CESD  Center for Economic and Social Development
CGIAR  Consultative Group for International Agriculture Research
CIFOR  Center for International Forestry Research
CPI  Consumer Price Index
CSIRO  Commonwealth Scientific and Industrial Research Organization
CSOs  Civil Society Organizations
DOST  Department of Science and Technology
EC  European Community
EIU  Economist Intelligence Unit
EU  European Union
EWG-MRLs  Expert Working Group on Harmonization of Maximum Residue Limits
FAF  Food, Agriculture and Forestry
FAO  Food and Agriculture Organization of the United Nations
FDI  Foreign Direct Investment
FOs  Farmers Organizations
FTAs  free trade agreements
<table>
<thead>
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<th>Acronym</th>
<th>Full Form</th>
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<tr>
<td>GAFSP</td>
<td>Global Agriculture and Food Security Program</td>
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<td>GAP</td>
<td>good agricultural practice</td>
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<td>GDP</td>
<td>Gross Domestic Product</td>
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<td>GHG</td>
<td>Greenhouse Gas</td>
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<td>HACCP</td>
<td>Hazard analysis and critical control points</td>
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<td>IARC</td>
<td>International Agricultural Research Centres</td>
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<td>ICRISAT</td>
<td>International Crops Research Institute for the Semi-Arid Tropics</td>
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<td>ICT</td>
<td>Information and Communication Technology</td>
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<td>IFAD</td>
<td>International Fund for Agricultural Development</td>
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<td>IFPRI</td>
<td>International Food Policy Research Institute</td>
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<td>IPPC</td>
<td>International Plan Protection Convention</td>
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<td>IPSARD</td>
<td>Institute of Policy and Strategy for Agriculture and Rural Development</td>
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<td>IRRI</td>
<td>International Rice Research Institute</td>
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<tr>
<td>IUU</td>
<td>Illegal, Unreported and Unregulated</td>
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<td>MARD</td>
<td>Ministry of Agriculture and Rural Development (Vietnam)</td>
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<td>MDGs</td>
<td>Millennium Development Goals</td>
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<td>NARS</td>
<td>National Agriculture Research System</td>
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<td>NEDA</td>
<td>National Economic Development Authority</td>
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<td>NePAAA</td>
<td>Network of Policy Advisors and Analysts in ASEAN</td>
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<td>NGO</td>
<td>Non-Government Organization</td>
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<td>NTBs/NTMs</td>
<td>Non-Tariff Barriers / Non-tariff Measures</td>
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<td>Non-Timber Forest Products</td>
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<td>NUOL</td>
<td>National University of Laos</td>
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<td>OIC</td>
<td>Officer-in-Charge</td>
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<td>PDR</td>
<td>People’s Democratic Republic</td>
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<td>PPPs</td>
<td>Public Private Partnership</td>
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<td>PSA</td>
<td>Philippines Partnership for Sustainable Agriculture</td>
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<td>RBI</td>
<td>Rice Bowl Index</td>
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<td>ReCoERDO-Asia</td>
<td>Regional Cooperation to Empower Rural Development Organizations in Asia</td>
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<td>RPOs</td>
<td>rural people’s organizations</td>
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<td>Rajaratnam School of International Studies</td>
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<td>Southeast Asian Regional Center for Graduate Study and Research in Agriculture</td>
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<td>Sustainable Forest Management</td>
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<td>SSRPs</td>
<td>Small-scale rural producers</td>
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<td>UC</td>
<td>University Consortium</td>
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<td>UN</td>
<td>United Nations</td>
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<td>USA</td>
<td>United State of America</td>
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<td>USD</td>
<td>United States Dollar</td>
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<td>WEF</td>
<td>World Economic Forum</td>
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<td>YAU</td>
<td>Yezin Agricultural University</td>
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Executive Summary

SEARCA Headquarters, Los Baños, Laguna, Philippines. The International Food Policy Research Institute (IFPRI) and the Southeast Asian Regional Center for Graduate Study and Research in Agriculture (SEARCA) jointly organized the launch workshop of the project Agricultural Transformation and Market Integration in the ASEAN Region: Responding to Food Security and Inclusiveness Concerns on 7-8 October 2016. More than 50 experts from international organizations, government agencies, academic institutions, civil society, and the private sector representing Cambodia, Lao PDR, Myanmar, the Philippines, Vietnam, China, India, the United States of America, and Italy took part in the discourse on global, regional, and national perspectives on agricultural transformation and market integration in the ASEAN region.

The launch workshop comprised three objectives: (1) to gain a good understanding of structural transformation and market integration at the global, regional, and national levels relating to agricultural growth and food security in ASEAN region, and of the various initiatives in the region and in target ASEAN Member States (AMS) that address food security and inclusiveness concerns; (2) to level-off on what the project hopes to achieve and on the roles of various stakeholders; and (3) to develop draft workplans at regional and national levels towards enhancing the capacity of ASEAN and the AMS to identify and design policies and programs and agri-food value chain investments that benefit small-scale rural producers (SSRPs).

The International Fund for Agricultural Development (IFAD)-funded project, implemented by IFPRI as lead and SEARCA as implementing partner, focuses on strengthening the institutional capacities of ASEAN in general and five AMS in particular to develop and implement policies and sub-regional programs in support of the integration of smallholders in agriculture and food markets. Specifically, the targeted AMS are Cambodia, Lao PDR, Myanmar, the Philippines, and Vietnam.

In his welcome remarks, SEARCA Director Dr. Gil C. Saguiguit, Jr. stressed that the effort to integrate smallholder farmers in food production is key to food security in Southeast Asia. He also mentioned that smallholder farms and small-scale entrepreneurs can be assisted to maximize opportunities of borderless trade and achieve sustainable and inclusive growth in the region through policies that ensure competitive advantage of the AMS. In the same tone, Dr. Fabrizio Bresciani, Regional Economist at IFAD – Asia and the Pacific Region emphasized that the AMS should start thinking about the implications for rural wages and the competitiveness of smallholder sector of increase in and the dynamism of ASEAN trade. He also touched on how the AMS can adjust and take advantage of current conditions with help from IFAD. He stated that he hopes to see this project strengthen linkages among various partners and lead to better understanding of future entry points in country developments that track real solutions on the ground.

Meanwhile, Dr. Pramod Kumar Joshi, Director of IFPRI - South Asia gave additional insights on the project background. He provided some key points including responding to food security and inclusiveness concerns by connecting the Sustainable Development Goals to the project; integrating families with tiny
landholdings into the global and regional agricultural food systems; protecting the interest of smallholder farmers; and including climate change, food waste, food safety, and diet imbalance into the food security perspective, among others. He also mentioned that keeping pace with changes at the global level in the food sector entails a necessary discussion on value chain competitiveness, taking advantage of economies of scale, access to markets, and farm diversification.

Against this backdrop, Dr. Bessie M. Burgos, Program Head for Research and Development at SEARCA, introduced the background and structure of the launch workshop to the participants. She discussed how the various workshop sessions will contribute to the achievement of the project activities and expected outputs.

The workshop proper was divided into six sessions, with the last two sessions devoted to developing draft workplans at regional and national levels. There were 17 eminent persons and luminaries in their fields who served as resource speakers discussing Global and Regional Perspectives on Structural Transformation, Agriculture and Food Security (Session 1), National Perspective on Agricultural Transformation and Market Integration (Session 2), Recent and Ongoing Initiatives within ASEAN on Food Security and Inclusiveness (Session 3), and Role of Private Sector in Agricultural Trade and Market Integration (Session 4).

The two-day workshop highlighted the importance of the agricultural sector in the ASEAN despite the declining share of agriculture in GDP, especially in linking to the concern for inclusiveness and reducing poverty focusing on smallholders. There was also recognition that the AMS are in different stages of economic development—from Vietnam’s phenomenal economic growth, Myanmar’s new vision for agricultural development, to the Philippines’ deviation from stylized facts of agriculture development—and that any trade-offs in the long term need to be balanced with equity, efficiency, and sustainability. Emerging perspectives discussed were comprehensive food systems, agricultural value-chains as a stepping stone for inclusiveness, nutrition-driven and -sensitive agriculture in food systems taking into consideration structural transformations and diet preference, a landscape approach to holistic agricultural development, evidence-based policy making, and private sector involvement. The important role of the three pillars of the ASEAN Vision was underscored as a guidepost together with other ASEAN-level initiatives. The case was also made for empowering small and medium-scale enterprises; measuring the robustness of food system resilience metrics; factoring other sources of productivity such as environmental services; managing genetic and indigenous resources through greening value chains; and the role of farmer cooperatives and family farms. Other discussions by the experts included the importance of fostering the ‘people component’, trust and mutual benefit among partners; learning from informal institutions; and barriers to trade. The results of the workshop, emanating from Sessions 5 and 6, were the draft action plans at the regional level and of the involved AMS countries.

In the closing session, H.E. Dr. Ty SoKhun, Secretary of State, Ministry of Agriculture, Forestry, and Fisheries of Cambodia, stated that the launch workshop was the start of a process of dialogue—a first step in building trust among involved AMS. Dr. Fabrizio Bresciani expressed high hopes in the future of the project. Lastly, the
immediate next steps of the project were laid out by Dr. Bessie M. Burgos, which are the review of the workshop outputs and proceedings, followed by the national level launch and inception workshops, the creation of regional and national project steering committees, and identifying focal points at the ASEAN and the AMS levels to assist and lead in upcoming national level activities.

Participants engaged in the workshop session.
I. Opening Program

a. Welcome Remarks

Dr. Gil C. Saguiguit, Jr., SEARCA Director, warmly welcomed, with traditional Filipino hospitality, the participants and guests to SEARCA and the launch workshop. He acknowledged and recognized distinguished personalities and institutions who provided their assistance and support for the two-day program of the launch workshop. He then provided the institutional context for the program launch by introducing SEARCA to the participants. Dr. Saguiguit mentioned that SEARCA is being hosted by the Philippine Government through the Department of Education. He emphasized SEARCA’s mandate, which is to build capacities in the agricultural and rural development of 11 member countries which include the ASEAN Member States plus East Timor through the triumvirate of programs on graduate education, research and development, and knowledge management.

As implementing partner of IFPRI and IFAD program, Dr. Saguiguit emphasized SEARCA’s priority thrust on promoting regional integration and cooperation in Southeast Asia towards inclusive and sustainable agricultural and rural development in view of the ASEAN Economic Community. He stressed that efforts to integrate small-scale farmers into commercial food systems is key to overall regional development and the attainment of ASEAN food security. He highlighted the varied challenges and opportunities facing various institutions and
stakeholders arising from the expected transformation of the region into a major conglomerate in global agricultural trade. These challenges and opportunities warrant a re-thinking of relevant national land regional policies, especially considering the ASEAN Cooperation in Food, Agriculture and Forestry (FAF 2016-2025) and the ASEAN Integrated Food Security framework (AIFS Framework 2015-2020).

Dr. Saguiguit explained that the program goal is to strengthen the capacities of AMS in developing policies and strategic programs that will ensure competitive advantage and participation of each country. He emphasized the need to assist smallholder farms and small-scale rural producers and entrepreneurs to maximize borderless trade and achieve sustainable and inclusive growth in line with achieving food security in AMS. He expressed hope that the program will lead to concrete action plans and roadmaps that allow for a clear understanding of how FAF and AIFS can be translated into policy, institutional support and technical assistance that would benefit farming communities in the AMS.

Lastly, Dr. Saguiguit once again thanked IFAD and IFPRI for the growing partnership. He expressed his hope that the continued trust and confidence in working together will capitalize on their combined expertise, resources, and strong desire to work together in achieving progress towards agricultural and rural development.
b. Special Remarks

Dr. Fabrizio Bresciani, Regional Economist, IFAD-Asia and the Pacific Region began his special remarks with thanks for the launch workshop and the participation of all in the 5-year program. He explained that as a specialized agency in the UN system, IFAD focuses on agriculture and rural development, concerning itself with providing loans to government and to stimulate projects in policy making in the ASEAN.

Dr. Bresciani noted the visible increase in trade in the ASEAN and that the Region has become a very dynamic part of the global economic system. He mentioned that this dynamism and increased trade brings a unique challenge to the region, particularly in light of rising rural wages from the past 10 years and of concerns with the competitiveness of the smallholder farming sector as the ASEAN progresses towards becoming a major exporter of agricultural products. He stated that policy concerns should be geared at how smallholder farmers will face this challenge.

The Regional Economist from IFAD stated that AMS should start thinking about these issues and how these countries can adjust. He stressed that ways to take advantage of these conditions should be identified and that this workshop worked towards this by looking at upstream policy analysis and technical assistance at the regional level down to the national level. Dr. Bresciani voiced his hope to see the project strengthen linkages IFAD has with partners in the region at the private sector, governments, and farm organization among others. He stated that the IFAD would like to better understand future entry points in
country developments in the region that track real challenges on finding solutions on the ground.

Lastly, Dr. Bresciani thanked once again all the partners and participants to the launch workshop and reminded them that each partner in this program had their strengths and advantages that they can contribute to increase the likelihood that the program will have a beneficial contribution to the ASEAN agricultural sector.

c. About the Program and Workshop Background

Dr. Pramod Kumar Joshi, Director - South Asia, IFPRI provided the program overview. He began by stating that the program was in response to food security and inclusiveness concerns. He stated that events at the global level influence responses to these concerns and identifying the challenges are key to formulating the response. The following were the key global challenges identified:

- Poverty, hunger, and malnutrition;
- Smallholder farmers and climate change;
- Speedy transformation of agri-food system;
- Rapid innovations in agri-food system by the private sector; and
- Realization for developing platforms for knowledge sharing.

Primarily, he mentioned the need to connect the program to the Sustainable Development Goals (SDGs) as it relates to poverty and food systems. Underlining the objective to integrate ASEAN with global SDGs and considering the recent International Year of Family Farming and the ASEAN Economic Community (AEC), he highlighted the opportunity for integrating families with small landholdings into the
global community of agricultural food systems. Additionally, protecting the interest of smallholder farmers, and including climate change considerations, food waste, food safety, and diet imbalance into the food security perspective were mentioned as equally pressing challenges.

Dr. Joshi stated that keeping pace with changes at the global level in the food sector entails a necessary discussion on value chain competitiveness mindful of the rapid changes and transformation from the farm level and national level production and taking advantage of economies of scale, access to markets, and farm diversification. He also mentioned that the current food system was not a balanced system, which consequence was imbalances in diet including undernourishment and malnourishment. He contrasted this imbalance with the presence of food waste. He mentioned that innovation in agricultural food systems, particularly in reducing losses in the food system can be brought about by the entry of the corporate sector. On farm diversification, he stated that the move away from traditional crops must consider the food security agenda at the national and regional levels – and that this commodity matching must be synchronized at the farm level.

As a knowledge sharing platform, Dr. Joshi stressed the opportunity for the program’s research to benefit smallholder farmers – especially in the move to commodities’ value added products and on account of migration, economic change, and other structural transformations already taking place. He said that research can consider how smallholder agriculture is increasingly becoming part of the globalized market, how learnings from success stories can be scaled up, and how climate change can affect commodities production.

Dr. Joshi mentioned (1) structural transformation in agri-food system, (2) risks of food price shocks, (3) value chain competitiveness, and (4) farm diversification out of traditional staple crops as key challenges from an AMS perspective. He then identified the following areas to harness opportunities in the ASEAN region:

- Understanding the challenges of smallholder in the context of transforming ASEAN agri-food system;
- Exploring opportunities to strengthen ASEAN’s efforts at regional food security and competitiveness;
- Developing clear guidelines on the implementation of the ASEAN Food Security Strategic Plan of Action (2015-2020);
- Assessing the role of private sector in a changing context; and
- Re-examining the key food security concerns in a rapidly transforming Asian agri-food system and growing farm pressure.

Dr. Joshi then placed the program into the larger ASEAN Integrated Food Security Framework, highlighting the need for a roadmap
towards a demand-driven food system that involves small-scale farmers and encourages greater and sustained public-private and public-community investment and partnerships, providing incentives and policies to achieve food security among AMS. He explained that the goal of the program is to strengthen the institutional capacity of the AMS to develop and implement policies and sub-regional programs and facilitate integration of smallholders in sub-regional agricultural and food markets focusing on Cambodia, Lao PDR, Myanmar, the Philippines and Viet Nam. He outlined the two objectives of the program as:

- Strengthen capacity of the targeted AMS to develop policies and programs; and
- Enhance cooperation in food security and agricultural development among AMS.

Further, he outlined the main components as policy studies and expert workshops, high level policy forums and roundtables, and technical assistance for planning and policy development. The direct beneficiaries include the AMS governments and the ASEAN, meanwhile, the indirect beneficiaries are smallholder farmers and poor urban and rural households. He expects the following outcomes from the program:

- Improved competitiveness of smallholders within AMS in the production of key food and industrial crops;
- Reduced exposure of less developed AMS to food security shocks; and
- Network of Policy Advisors and Analysts in ASEAN (NePAAA).

Dr. Joshi described the Project Team as comprising the Donor – IFAD; the Lead Institution - IFPRI; the Partners - SEARCA and the ASEAN Secretariat; and the Collaborators - RSIS – Singapore, Research institutions, government, CSOs and FOs in targeted AMS. He ended the program overview by thanking all the participations with the expectation that an excellent work program can be generated through a strong partnership in research, capacity development and policy communication among all stakeholders involved.
Against this backdrop, Dr. Bessie M. Burgos, Program Head for Research and Development at SEARCA, introduced the workshop background and inception launch to the participants. The workshop objectives are as follows:

1. Gain good understanding of the structural transformation and market integration at global, regional and national levels as these relate to agricultural growth and food security in ASEAN region; and various initiatives in the region and in target AMS to address food security and inclusiveness concerns;
2. Level-off on what the Project hopes to achieve and the roles of various stakeholders – AMS, CSOs/FOs, the private sector, research institutions, and project implementers (IFPRI as lead and SEARCA as implementing partner); and
3. Develop a Draft Action Plan at national and regional levels towards the achievement of the project’s target outcomes, which are (a) enhanced capacity of AMAF-CSO/FO Annual Forum to identify and design ASEAN policies and programs, and regional agri-food value chain investments that benefit small-scale rural producers (SSRPs); and (b) enhanced capacity of AMS to identify and design national strategies, policies, programs and national agri-food value chain investment initiatives that benefit SSRPs.

Dr. Burgos stated that to achieve the objectives the workshop is organized around six sessions: Session 1 looks at the big picture, understanding events around the world and the region in terms of structural transformation, agriculture, and food security. Session 2 takes a closer look at the state of play in the target AMS and their responses
to the changing agricultural landscape. While, Session 3 focuses on specific regional-level initiatives that aim to contribute to the vision of ASEAN cooperation in FAF that is “a competitive, inclusive, resilient, and sustainable food, agriculture and forestry sector integrated with the global economy, and contributing to the food and nutrition security in the ASEAN community.” Session 4 highlights the important role of the private sector in agricultural trade and market integration marked by inclusiveness. Lastly, Sessions 5 and 6 are for the development and discussion of the draft initial workplan on the way forward of the project, by identifying actions that lead to the achievement of the project’s target outputs and outcome.

Dr. Burgos mentioned the activities and output of the project and how these align with the workshop sessions (see Figure 1). She highlighted that all Sessions contribute to Outputs 1.1 (Y1), 1.2 (Y1-2), and 1.3 (Y1-3), while Sessions 3, 5, and 6 contribute to Outputs 1.4 (Y2-5) and 2.1 (Y3 & Y5). Sessions 2, 3, 4, 5 and 6 contribute towards Outputs 2.2 (Y2-5) and 3.2 (Y3-5), on the other hand, Sessions 1, 3, 5, and 6 contribute to Output 3.1 (Y3-5).

### Workshop Sessions and Project Outputs

<table>
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<tr>
<th>Workshop Sessions</th>
<th>Project’s Key Activities/Outputs</th>
<th>Project’s Year (Y)</th>
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<tbody>
<tr>
<td><strong>Session 1: Global and regional perspectives</strong> on structural transformation, agriculture and food security</td>
<td>Regional and national inception workshop reports and workplans (Output 1.1)</td>
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<td><strong>Session 2: National perspectives</strong> on agricultural transformation and market integration</td>
<td>Strategic Report on challenges faced by smallholder agriculture in the process of market integration (Output 1.2)</td>
<td>Y1-2</td>
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<td><strong>Session 3: Recent and ongoing initiatives within ASEAN</strong> on food security and inclusiveness</td>
<td>Five Studies focusing on national strategies and policies (Output 1.3)</td>
<td>Y1-3</td>
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<td><strong>Session 4: Role of private sector</strong> in agricultural trade and market integration</td>
<td>Four Reviews of ASEAN multi-country cooperation initiatives to promote smallholder agriculture (Output 1.4)</td>
<td>Y2-5</td>
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<td><strong>Sessions 5&amp;6: Working group and panel discussion on way forward.</strong></td>
<td>Two High-Level Policy Forums organized and proceedings published (Output 2.1)</td>
<td>Y3 &amp; Y5</td>
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<td>Group 1 - Cambodia</td>
<td>Ten Roundtables organized and proceedings published (Output 2.2)</td>
<td>Y2-5</td>
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<td>Group 2 - Lao PDR</td>
<td>A package of Technical Assistance to AMAF-CSO/IFO for the preparation of ASEAN Value Chain Roadmaps delivered and the Roadmaps published (Output 3.1)</td>
<td>Y3-5</td>
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<td>Group 3 - Myanmar</td>
<td>Five packages of TA to targeted AMS and national platforms to prepare National Strategic Plan of Action delivered and the N-SPA published (Output 3.2)</td>
<td>Y3-5</td>
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Figure 1. Workshop Sessions and Project Outputs

Lastly, Dr. Burgos thanked all the participants for accepting the invitation and emphasized the valuable input that around 50 experts and distinguished luminaries will be contributing to the project through their discussions during the workshop.
II. Workshop Sessions Highlights

a. Session 1: Global and Regional Perspectives on Structural Transformation, Agriculture and Food Security

Dr. Paul S. Teng, Chair for Session 1, introduced the workshop session guidelines and laid out the general context of discussion for Session 1. He highlighted a few considerations to factor into deliberations that impinge on the structural transformation and market integration that are likely to affect ASEAN such as:

- Experience from other world regions show structural changes having occurred in the agricultural sector of all countries transiting from low- to middle- and high-income economies include the reduction in GDP and labor contribution of agriculture, citing the United States model; and market integration in a common market, citing the European Community as an example.

- Unique characteristics of the ASEAN which are the ASEAN Vision 2025; the 100 million-strong and politically significant smallholder farmers and their vastly varying degrees of contribution to the labour force and GDP of different AMS; the burgeoning middle class which will grow from 190 million in 2012 to 400 million in 2020; the importance of rice in food security discourse; the influence of technological innovations coming from three CGIAR centres – IRRI, WorldFish, and CIFOR; and an increase in rural poverty.
i. Global Perspective

Dr. Suresh Babu
Senior Research Fellow and Head of Capacity Strengthening, IFPRI

A wide range of interconnected factors affect the different issues that set the stage for structural transformation and market integration. Dr. Suresh Babu stated that structural changes are both a cost and factor in economic growth. An important factor to consider is relationship of economic growth and inclusiveness. Countries are growing at different rates and therefore have different structural transformations, however, transformations need to be food system based to include inclusiveness. He articulated that developing countries experience structural transformation through:

- Declining share of agriculture as an employer and as a contribution to the GDP. He states that from 1965-2010 the value added by the agricultural sector in the economy compared to industry, market services, and non-market services has decrease substantially. Agriculture remains a major employer in the Asian and Pacific sub-regions but its relative importance is declining.
- Shift in employment from agriculture to services sector.
- Rise in service economy. The declining share of agricultural employment is paralleled by the rise in service sector throughout regions in the world.
- Rapid urbanization and demographic transition. An increase in world population, especially in urban areas,
calls for a critical study on the demographics of population increase – from migration, age, health, to its effects on agriculture and industry.

Dr. Babu stresses that agricultural transformation is critical in moving agriculture from subsistence to specialized, and finally to a highly productive economy. He notes that despite growth in overall total factor productivity, global agriculture faces the following issues:

- Uneven total factor productivity across countries and regions;
- Developing countries are experiencing rising incomes and demand for high value commodities;
- There is a change in dietary patterns across the world; and
- The share of agricultural trade in total merchandize trade has decreased significantly.

Dr. Babu provides a food systems perspective to frame agricultural issues in a broader context. He mentions that the food system is complex and requires a holistic and comprehensive response by each country to transform their agriculture by focusing on production and commercialization. This transformation can occur when efficiency improvements are made in production systems, markets, trade, and the nutrition-agriculture linkage. However, challenges to improving food system efficiency include a decrease in per capita arable land, increasing water scarcity, depleting biodiversity, and increased vulnerability to climate change. He suggests the following policy actions to address these challenges:

- Increase capacity for adoption of climate smart agricultural practices;
- Improve linkages between markets and smallholders;
- Increase use of ICT in dissemination of information; and
- Sustainable intensification of agriculture, hence producing more outputs (production, income, nutrition) with more efficient use of all inputs.

Dr. Babu adds food price volatility, food market revolutions, falling competitiveness of global agricultural and food trade, alarming rates of hunger in 50 countries, 2 billion people suffering from micro-nutrient deficiencies, increased demand of non-grains and derived demand for feed grain, and the prospect of reducing poverty through free global merchandise trade and markets as other prominent global trends in agricultural markets. In this regard, he recommends the following actions:
- Countries should build low cost platforms to reduce information asymmetry across markets.
- Building infrastructure for competitive agricultural value chains is important.
- Improve access to finance, particularly for smallholders.
- Build capacity at the individual, institutional, and system level for effective functioning of agricultural markets.
- Establish adequate safety net for the ‘losers’ in agricultural trade liberalization.
- Efficient supply chains to ensure proper storage and delivery of outputs.
- Stability of exchange rate
- Political stability in the country
- Develop effective nutrition sensitive programs to affect coverage.
- Targeted agricultural programs designed for enhancing access to diverse diets in poor populations, and fostering women's empowerment.
- Evidence base on nutrition sensitive programs needs to improve nutritional outcomes.

Dr. Babu reinforces the point that for structural transformation to take place, agricultural transformation is the important pre-requisite and concludes that an inclusive and comprehensive food system perspective is essential for this agricultural transformation.
ii. Southeast Asia Perspective

Dr. Parthasarathy Rao Pingali
Former Principal Scientist, International Crops Research Institute for the Semi-Arid Tropics (ICRISAT)

Dr. Parthasarathy Pingali discussed the Southeast Asian perspective of agricultural transformation and market integration in the context of the ASEAN Economic Community. Taking off from the previous presentation on the global perspective of structural transformation, agriculture, and food security, he stressed in his presentation that each country has a different context that needs to be recognized and, on the other hand, similarities in experience that each of the AMS can draw on for strategies. His presentation was divided into the following areas of discussion:

**Key socioeconomic indicators of selected ASEAN countries**

Dr. Pingali states that the ASEAN is a diverse group of countries in terms of population, GDP, or per capita income and therefore falls into many different categories. The region has the 7th largest combined GDP and is marked by a trade surplus in agricultural commodities. Intra-ASEAN tariff in ASEAN6 is nearing zero, however non-tariff barriers continue to be high. He notes that the portion of agricultural trade is small compared to total ASEAN trade but the ASEAN trade balance in agricultural products was USD44 billion in 2013. He mentions that paddy is an important crop for all countries but that Vietnam and Thailand account for 94 percent of all exports while Indonesia, Malaysia, and the Philippines account for 75 percent of all imports. He
notes that there are many other characteristics of the structural transformation taking place in the region including those related to demographics – an increase in urban population; and land – most farmers are smallholder farmers.

The structural transformation of agricultural; self-sufficiency in cereals

Agriculture continues to be an important sector in the ASEAN. The structural transformation of agriculture in the ASEAN can be characterized by a reduction of the agricultural sector share of the GDP but without a proportional decrease in agricultural employment share of the GDP, resulting in a widening of inter-sectoral labor productivity differential. Increases in labor productivity have not also matched the pace of land productivity – making increasing labor productivity extremely important as agricultural employment is sizeable due to higher rates of population growth compared to traditional rates seen by countries in the same industrialization stage of development and the large share of rural population to total population. The low skill levels of those in the agriculture sector also add to the difficulty in shifting employment to non-agricultural activities. A turning point observed in most developed countries is when agricultural labor declines to a degree where the productivity differential between the different sectors diminish. The AMS occupy differing stages of agricultural development and therefore are affected by sets of contributing factors. Changes in cereal self-sufficiency and crop diversification illustrate a structural transformation in agriculture and affect the agricultural production portfolio of AMS. Large imports by Indonesia, the Philippines, and Malaysia make cereals a food security issue in the ASEAN despite a general decrease in the share of cereal value in gross agricultural production value in the region. Among the targeted countries by the project, only the Philippines is a net importer of cereals.

Changing agricultural production portfolio driven by a changing consumer food basket

There is a trend of crop diversification as the cereal share in calories decrease and the share of livestock value in gross agricultural production value and per capita availability of fruits and vegetables increase over time. The share of animal protein in total protein of ASEAN consumers have steadily risen with the Philippines, Vietnam, and Myanmar now outpacing the world average. Crop diversification levels differ for each country and based on crop – with high levels of diversification for root and
tubers in Cambodia; livestock and pulses/oilseeds for Myanmar; livestock for the Philippines; and livestock and coffee/rubber for Vietnam.

**Contribution of yields and competitiveness in an open economy; and trade in agricultural products**

The contribution of yields for rice paddies, coarse grains, and pulses mask the underlying condition of increases being attributed not to productivity but expanded cultivated area which is unsustainable in context of limited land supply and various competing uses. On the other hand, competitiveness goes beyond yields but into considerations of logistical support and infrastructure – these affect the final cost of commodities. The top five commodities by share of exports for Cambodia, Lao PDR, and Myanmar, Philippines, and Vietnam account for a large share of total exports – lowest being for the Philippines at 54.6 percent and with the rest having a share of 76.5 percent or higher. Including for the share in import, the top five commodities comprise between 32.5 percent (Vietnam) to 59.6 percent (Myanmar) – which has potential implications in cases of import substitution requirements.

**Speeding up agricultural transformation and integrating into ASEAN Economic Community**

The agriculture sector continues to be important for a large majority of the population where striking a balance between self-sufficiency in rice production and crop diversification for exports is an opportunity to promote the agricultural sector’s efficiency and competitiveness through a freer flow of capital and investments, expanding production to take advantage of potential economies of scale, innovations designed for the poor, greater market access and better processing facilities and roads, and Information and transport services. In the long run, Dr. Pingali stresses the importance of reducing surplus labor in agriculture.

In finishing, Dr. Pingali puts forth the following considerations for moving towards a competitive economy:
- Complying with Trade in Goods Agreement (removal of intra ASEAN tariffs);
- Overcoming non-tariff barriers thorough investment in GAP, sanitary and phytosanitary standards, and HACCP compliance;
- Strengthen regional economic and trade collaboration;
- Improving the investment and doing business environment and logistic support;
- Trade facilitation through standardized trade and customs procedures;
- Effective trade policies for competing in global markets;
- Public and private investment for the creation of institutional mechanisms to support exporters; and
- Leveraging the power of ICT to support small holders in processing, marketing and realizing market opportunities.

iii. Agricultural Trade, Market Integration and Food Security in Southeast Asia

Dr. Nicholas W. Minot  
*Deputy Division Director, Markets, Trade and Institutions Division, IFPRI*

The presentation of Dr. Nicholas Minot discussed food demand and its effects on food production, market and trade, and the interplay of food security linked to income and self-sufficiency while strongly proposing the use of child stunting as an indicator for food security.

At the onset, Dr. Minot stressed the need for regional acknowledgement of the importance of market integration, not only in terms of opening borders to improve food security – but for the promotion of income growth and poverty reduction through economies of scale and comparative advantage. Market integration concerns by AMS include adverse impacts on food security – especially hesitance to rely on imports to...
supply rice, an important staple in the region. However, changes in food consumption, spurred by income growth and moving away from low-cost staple grains in favor of meat, fish, eggs, and dairy products; questions the influence of national objectives of rice-self-sufficiency in the context of an economically growing and rapidly transforming ASEAN agricultural sector. Dr. Minot provides statistics from the FAO showing that growth in per capita consumption of rice has been low or negative for a decade – and the inverse being true for meat, fish, eggs, fruits, and vegetables; confirming a pattern of decreasing share allocation of rice and other staples as incomes rise.

Dr. Minot also plots rice consumption against per capita GDP over time and finds that at per capita GDP below USD1,000, rice consumption is generally 150 kilograms per person per year and falls to 120 at USD2,000. He also mentioned that this higher income group diversifies away from rice to wheat, fruits, vegetables, and animal products. This change in food demand reflects to some degree in agricultural production. However, because of agricultural trade, production patterns do not necessarily follow consumption patterns. Dr. Minot, through trade ratios, examines the importance of trade in food production and presents that among rice, vegetables, meat, milk, and eggs – trade in milk, particularly powdered milk, is important as imports are often several times greater than domestic production. Fish and seafood also prominently rely on trade with a trade ratio above 20 percent for most countries. He contrasts the low trade ratios for rice, vegetables, and meat to the apparently contradicting sense that waves of imports threaten food production, as trade is minor in quantity compared to local production. Thus, he asserts, are countries like the Philippines and Indonesia whose rice trade policy in general monopolizes and restricts imports to promote rice self-sufficiency. Tariff equivalents of import restrictions reached 80 percent for the Philippines and 120 percent for Indonesia. Rice import restrictions in importing countries positively affect net surplus farmers, especially those whose rice sales represent a large share of their income; negatively affect net buyers of rice such as urban and rural households, and the poor; and depending on country context can increase (Cambodia) or reduce (Vietnam) poverty.

Dr. Minot suggests that to explore the effect of market integration on food security, a useful indicator can be child stunting which is a measure of chronic malnutrition resulting in a height-for-age that is 2 standard deviations below the mean for a reference population. Using data from 127 countries, he
declared that a strong negative correlation between per capita GDP and the incidence of stunting exists. Around 40 per cent of children are stunted in countries with a per capita GDP of less than USD2,000 but the incidence falls to 25 percent at USD5,000 and below 15 percent at USD20,000. Dr. Minot points out that:

- rising incomes diversify food demand away from rice and other staples, that rice consumption rises at low incomes and falls further as income increases;
- changes in food demand and agricultural commercialization cause agricultural production to shift toward high-value commodities; and that
- falling trade barriers and lower transportation costs are increasing the importance of trade in agriculture except in rice, where import restrictions are maintained in the interest of food security.

Along the line of associating national food self-sufficiency with improved food security, he estimates that cereal self-sufficiency (the ratio of domestic production to domestic consumption) is statistically significant, albeit weak, and occurs with a positive relationship between cereal self-sufficiency and child stunting. He signified that stunting is not associated with cereal self-sufficiency but that stunting is strongly correlated with income – higher income leads to lower stunting, as rising incomes shift household food demand away from rice and other staples. He mentioned that countries with high level of cereal self-sufficiency are surprisingly those with somewhat lower levels of food security and without implying causation, Dr. Minot concludes by raising an important question about assumptions that food self-sufficiency is an effective strategy to improve food security.
iv. Regional Cooperation for Economic Well-being and Food Security in the ASEAN-Agenda for Research, based on Emerging Issues

Dr. Devesh Roy  
Research Fellow, IFPRI

Structural transformation in Southeast Asia poses challenges to the regions’ food security and inclusive agricultural growth agenda. In this presentation, Dr. Devesh Roy details principle issues of integration especially the gaps between what is proposed and what is achieved. He stated that the policy agenda is moving towards achieving a common market but is only effective when food security and poverty concerns are addressed. He mentioned that the improvement in regional agricultural value chains’ competitiveness as a bridge to globalized value chains should include careful consideration of issues of sovereignty. These include loss of sovereignty due to industrialisation processes influenced by linking regional value chains to global value chains and such as farm diversification out of traditional staple crops that may be at variance with either national or rural or both scales of food security strategies. Additionally, he stated that food price shocks are perceived as a major threat to food security.

To mitigate the risk of food price shocks and their impact on national food markets a regional framework has been developed by ASEAN – the APTERR+3 which is complemented by the establishment of ASEAN Food Reserve and the ASEAN
Food Information and Early Warning System. Dr. Roy stated that National food stocks and reserves should be harmonized with the functioning of these frameworks. He also added that the integration of rice and corn value chains at regional level would also open opportunities for private sector investments to support modernization & result in increased efficiency.

He mentions that, in general, overall progress in implementing the ASEAN Integrated Food Security (AIFS) Framework is limited despite an early start. He made an exception for the establishment of the APTERR, however, other than that coordination of national food security policies and the establishment of roadmaps for the development of regional food value chains have lagged.

Dr. Roy then turned his discussion on to food security, particularly on the role of non-farm sector, role of integration with the global economy, and the terms of trade of agriculture and non-agriculture sectors. He mentioned that Singapore, Brunei, and Malaysia are the most food secure in the region with Cambodia, Lao PDR, and Myanmar the most food insecure. He questioned why food secure countries are not necessarily the food producers and why food insecure countries are those who produce food. He asserts that the interface between non-farm and farm sector is very important in looking at a regionally integrated and globalized food value chains and inclusiveness. He said that the terms of trade for agriculture, industry, and services should be studied to see how the terms affect trade between agricultural and non-agricultural sectors. Dr. Roy then states that there is a need for evidence-based empirical policy analysis and dialogue involving governments, civil society, research and academia, farmers associations, and private sector. In this light, he lists the following emerging issues facing the ASEAN:

- Common market high on the agenda
- Regional value chains as a stepping stone for globalized value chains
- Rice reserve system virtual or real needed
- Climate change, environment issues
- Migration- intra country and international

Lastly, Dr. Roy looks at the trend of stylized facts – noting that something has changed post food price and financial crises of 2008: rice, the poster boy for food security, has had the worst shocks and instability since that time (see the instability of rice trade in Figure 2). He then frames a series of questions on the reliability of assumptions framing the patterns from stylized facts – and the implications on food security. One example was
question on food self-sufficiency and self-reliance as not advocated based on principle of comparative advantage, such was the case when Vietnam and Thailand chose to supply globally at the expense of other ASEAN members, notably the Philippines, to seek greater economic gains during the food crises. Instead, he proposes cooperation on building import capacity and ability to rely on world markets and supra-regional integration for food production. However, he advises for caution in integration since Protectionist policies in agriculture for sensitive commodities still exist and in fact, the relatively high intensity of trade among ASEAN countries is due primarily to rapid economic growth rather than the result of ASEAN economic cooperation or agreements.

Figure 2. Intra-Regional Trade Between ASEAN

Dr. Roy concludes by stating that there is a lot more to be done to harmonize the different ASEAN frameworks for economic wellbeing and food security and that a lot of focus of research must be made on how to include smallholder farmers into the market integration to ensure inclusiveness amidst the continuing emerging issues of climate change and migration.
v. Discussants’ Remarks

Dr. Samarendu Mohanty

Head, Social Sciences Division, IRRI

Each of the presenters talked about diversification; in the last eight years, global annual production growth rate has increased higher than the population giving rise to larger incomes and food demand moving away from rice. However, we must look at more than just moving away from rice as Southeast Asia still consumes about 120-140 gram cereals still in total - there is declining per capita consumption in rice, but taking wheat together with rice amounts to just the same 120-140 grams. Another point Dr. Mohanty made is the need to understand how to capture rice demand in a changing market caused by growing and wealthier population and a variety of new uses of rice as a result of industrialization. There is a need to profile customers. Additionally, on the issue of the contribution of area in agricultural production: the harvested area does not necessarily mean that the physical area is increasing, it could be that the physical area is constant but the harvest is decreasing as part of a technology cycle. Lastly, buying rice when prices are low as a means to stabilize the market has never worked, it is the wrong tool for the ASEAN and it does not have any significant effect.
Dr. Roehlano M. Briones  
*Research Fellow, Philippine Institute for Development Studies (PIDS)*

The presentations were very informative and a few clarifications include considering a wider range of case studies – from Indonesia and Thailand as they are in an advanced stage of structural transformation; looking deeper into the link of surplus labor and the role it plays in structural transformation – especially the shift in surplus labor as a spatial dimension of traditional movement of people where the option of rural and urban concentration is a large issue. How do we get this shift away from agriculture while keeping the bulk of the population in disperse spatial networks? Additionally, the demand side of structural transformation like the movement of labor can be considered in a positive light, such as the shift away from cereals can also be seen as positive if the two can be tied together and if they are reinforced by domestic dietary patterns. For self-sufficiency and structural transformation, we must consider moving dietary preferences versus comparative advantage, also taking into consideration agricultural trade and food security. Linking child stunting to broader food policy issues is laudable – noteworthy is that despite increased income, child stunting for 0-5 year old children is at 30 percent. It can be a manifestation of the inability to translate growth per capita income into improved nutritional outcomes. The role of demand side (international trade) versus supply side (international market) in trade should be researched more thoroughly – what would be the scenarios if these trade connections were broken? The role of self-sufficiency, the impact of cheaper food, and outcomes for farmers all must be
considered in terms of food security and the benefit of smallholder farmers.

Dr. Isabelita M. Pabuayon
Dean, College of Economics and Management, University of the Philippines Los Baños

The original prescriptions on the role of technology should be revisited when discussing basic transformation of primary agriculture – how can technology be best used to address local farming activity? There is also the difficulty of shifting resources from rural to urban areas, primarily due to the lack of skills of rural workers which exacerbates the problem of poverty and highlights the importance of non-farm employment opportunities. For the case of the prevalence of fragmented farms, operational constraints limit gains from linking small farms to the market. The Philippine average for farm size is 1.29 hectares with more than 50 percent of the farms less than a hectare. This problem requires collective action, with no shortage of possible forms – cooperative, nucleus farming blocks, cluster farming, among others; these models and examples of best practice from other countries should be studied. In the national context, improving the efficiency and distribution of food system are needed – from making land available for food production to making food affordable to consumers. Improving market operations including processing, standardization, and storage are needed to increase profit margins of farmers. However, farmers may lack the business acumen and often do not see farming as a profitable business.
Without the entrepreneurial mindset and outside support, productivity and the tendency for favorable markets is limited. Additionally, consumption habits and preferences of consumers and adjustments in production and targeting systems challenge both producers and marketers. There is much to learn and more to do about building capacity of farmers. Malnutrition through the lens of child stunting and the fact that stunting is not associated with cereal self-sufficiency is a big point to consider – the implication being addressing malnutrition requires diversification of nutrition sources; and this need not be expensive, they can be a local solution through home gardening and small plots. Lastly, food safety, product quality, and shopping convenience are big concerns among consumers – these things go hand in hand with changing market preferences – relating to issues such as product certificates and the supermarket revolution. How do smallholder farmers benefit from these and how should they be addressed in this project moving forward?

Open Forum

Question: Considering the trend for rice producers to shift toward high value products and with rice price fluctuations becoming more intense, we should not forget about rice – what aspects of the extent to which global markets influence agriculture and agricultural trade should be looked into considering the foregoing?

Dr. Minot: When shifting away from rice, look in terms of the budget share of rice as declines do not necessarily mean quantity of rice consumed declines, but over time as incomes increase, likely consumption per capita decreases but overall rice consumption in Asia is increasing. Even as rice consumption per capita falls, it doesn’t mean we should stop carrying out research on rice – we still need to increase the productivity and returns to rice farmers. How we deal with the shift is very important.

Dr. Pingali: Collective consumption of rice is rising slowly, on the other hand, the consumption of rice to calories has declined in favor of animal food, fruits, and vegetables.

Question: Regarding agricultural market transformation, where and when should a country make the move towards one commodity market; and what should the government do in terms of taxation policy and immediate protection?

Dr. Briones: There exists a need to harmonize policy with regards to the question but even if the policy wrinkle is resolved – for example in a single market the negotiated tariff is 35 percent, there should be a real next stage of trade liberalization so that
other commodities can join the rest at 0 percent tariffs. Broad policy statements toward liberalization are country dependent and will take time.

Question: Regarding measurements and what we measure - from the data presented as statistical series and cross sections – how reliable are these? Right now, data is limited, we need disaggregated data at the household level not only on cereals but on other food such as vegetables, fruits, and other food products so that we can fully seek answers to a healthy, balanced, and nutritious diet vis-à-vis food security.

Dr. Suresh: Fundamentally, different models require different data, and with policy makers the same issue is present: different models and different data. There is a confusion about what is really being discussed – the understanding of policy makers of the methodologies used by research is a constraint on the effectiveness and impact of the policies they make. For impact making policy, we need methods to be understood, especially in light of big data analysis. We need to know how to use this data in understanding structural rice transformation – what variables to identify, what needs to be changed in existing models. These are the kinds of ideas and input we need to discuss further in the workshop as we try to harmonize data and modeling to move forward with credible policies.

Question: Data has been presented on ASEAN countries moving away from the agricultural sector to the manufacturing and service sector and yet agriculture remains one of the most protected sectors. This is evident in negotiations for free trade agreements where the bulk of negotiations are agricultural. For example sugar, where the Philippines will unilaterally bring it down to zero but developed countries do not do the same. Why is agriculture so protected?

Dr. Minot: Food is considered a special category, countries may promote efficiency in textiles but food is different – there are political considerations, price volatility, and political economy considerations. Particularly, when small groups with a larger share of the voice on the matter are hurt – such as large scale sugar processing, they are politically vocal but do not represent the population numbers smallholder farmers do. Food security is a political economy issue, between agriculture and industry, and depending on time, domestic market distortions, and other context there is a push and pull for access and protection. In many cases, you may frame the issue around the environment and to address these concerns you must explore the complicated linkages between market integration, prices, households, and poverty.
vi. Remarks by the Chairperson and Co-Chairperson

Chairperson
Dr. Paul S. Teng
Principal Officer, National Institute of Education, and Adjunct Senior Fellow (Food Security), Centre for Non-Traditional Security Studies, S. Rajaratnam School of International Studies (RSIS), Nanyang Technological University and SEARCA Senior Fellow

Co-Chairperson
Dr. Bessie M. Burgos
SEARCA

Singapore imports 90 percent of its food requirements! So, talking about the issue of food security it is truly striking – but changes to the food system do not simply mean going to policy makers and asking them for change, you need to show ample and credible evidence. Considering the different options and much conflicting data it is important for all of us to agree on a credible data set and from there agree on basic recommendations. It is hard to argue on structural transformation unless units of measurement can be disaggregated and linked to an agreed model.
b. Session 2: National Perspective on Agricultural Transformation and Market Integration

Dr. Zaw Oo, Chair for Session 2, started the session by laying out some context as follows:

- Paying attention to the different context in the five countries targeted by the project – some with no ATMs, while many already undergoing agricultural transformation and market integration.
- With regards to market integration, the different economies within ASEAN do not necessarily trade with each other and instead compete with one another. There should be a collective action towards linking with the global market and how to integrate value chains with the largest economies in our larger region – China and India.
- Efficiency gains from transformation should also pay attention to sustainability and equity in relation to Sustainable Development Goals and the serious issue of child stunting. Focusing on institutional gains as well as economic gains – on how to build institutions that can support the transformation and integration as market integration is more than just correcting market distortions but hopefully the project can do more to build institutions in less developed countries.
- Effective and efficient institutions are key to the success of Agricultural Transformation and Market Integration.
i. Cambodia

Dr. Pisey Khin, Director, Nuppun Institute for Economic Research, Phnom Penh

Dr. Pisey Khin began by providing a quick glance on the Cambodian Agricultural Sector stating that temporary crops dominate with low diversification; smallholders are the majority with 3.73 million separate land parcels in 3.07 million hectares of total land for crop production; and cereals account for 85 percent of 2.88 million hectares dedicated to crop production by smallholder farmers. In contrast is permanently cultivated land, comprising 0.26 million hectares, and is mostly planted to fruits (33.1 percent), rubber (31.9 percent), and edible nuts (23.6 percent); with the rest going to Oil Crops, Spices and Aromatic Crops, and Non-food Crops.

He then discusses key issues facing the Cambodian agriculture:

**Crop production in Cambodia has remained driven mainly by supply side, and not the demand side.**

Smallholder farmers plant crops because they have a habit to do so and have no other jobs. The number of farmer organizations is very limited; and those that exist do not function well, due to improper management. This situation has hindered farmers from being well integrated into markets – including inputs and products – and led to inconsistent crop quality, high seasonality of production, inability to ensure a regular supply, and price bearish. A recent trend of agricultural mechanization
and modernization requires a larger amount of financial investment from farmers compared to a decade ago. Consequently, smallholder farmers become more prone to indebtedness because of loss incurred from their habitual agricultural production. This situation applies to major crops – including rice, cassava, maize, soybeans, tobacco, sesame, and vegetables – but not fruits.

**A better market integration has been observed in the last five years since 2010 in fruit sector.**

Most of fruit farmers are large scale, making it easier for buyers to approach them through contract farming. These farmers appear not to face issues related to supply as do their smallholder peers. However, lack of agro-processing is a key hindrance of growth of this fruit crop sector. This in turns brings down prices of fruits at farm gates.

**The high cost of electricity is one of the key challenges for agro-industry development in Cambodia, adversely affecting the country competitiveness.**

The unit cost of electricity is around USD0.20 per kilowatt hour in Cambodia, compared to around USD0.06-0.10 in Vietnam and Thailand. This high cost translates into higher cost of processing, e.g. paddy rice drying, milling, etc. Milling a ton of paddy rice costs around USD30 in Cambodia, while only around USD10 in Thailand and Vietnam. Coupled with high cost of logistics, agricultural commodities have flown out of the country as raw materials; while, processed agriculture-based products enter the country. In a similar way, almost all Cambodian fruits cannot be directly exported to markets in developed countries, due to the lack of appropriate facilities and logistics. Thus, fruits must be exported to either Thailand or Vietnam in raw material form, for processing and then being exported to the third destination country.

**Mechanism to leverage access to loans among farmers is merely absent, which also increases financial burdens of agro-processors.**

Limited domestic processing capacity – including drying and processing – has resulted in steep challenges to develop warehouse-receipt mechanisms for farmers to leverage their access to loans using their stocks. As a result, smallholders have to sell their paddy rice straightaway after the harvest. This in turn pulls down prices and increases burden for rice millers in terms of working capital. The situation can be observed in the last
several weeks of September 2016, where paddy rice sharply dropped below USD0.2 (or 800 riel) per kilogram.

ii. Lao PDR

Dr. Silinthone Sacklokham
Vice Dean of the Faculty of Agriculture, National University of Laos (NUOL)

Dr. Silinthone Sacklokham’s discussion followed five topics, namely: national goal and context, national statistics relevant to food security, trends of agricultural transformation, agricultural achievements, and agricultural development strategy toward 2025.

National Goal and Context. Laos aims to graduate from the least developed status by 2020 and to achieve regional and international integration in the context of AEC 2015. Steps will be taken towards industrialization and modernization by 2030.

National Statistics relevant to food security. Laos has the lowest population density in the ASEAN and has 72 percent of active labor working in agriculture – current population for 2015 is at 6.9 million. Annual GDP growth is 8.1 percent from 2011 to 2015, but by sector agriculture is only at 3 percent while industry reached a high of 15.8 percent (2010-11) and service a high of 9.7 percent (2012-13). The increase in GDP per capita from USD 1200 to 1900 (2010-2015) reflects the changing economic structure. The contribution of agriculture has seen a decline from 27.9 percent of total GDP in 2010-11 to 24.8 percent in
2013-14 – a contrast to the continual increase experienced in industry and service sectors. The gradual reduction of labor in agriculture from 75.1 percent in 2010 to 69 percent in 2014 was experience during growth in service and industry sectors in the same period. There has been a reduction in poverty from 27.6 percent in 2007-08 to 20.5 percent in 2012-13 and 10 percent in 2014-15; but the ratio of underweight children under 5 years old has been progressing very slowly, from 37 percent in 2006 to 27 percent in 2011. There is a high prevalence of stunted children but it has been reduced from 40 percent in 2006 to 38 percent in 2011.

Trends of agricultural transformation. The transition from subsistence into commercial smallholder production includes contract farming, concession, and farmers’ organization. Changes from food production to industrial crops production are reflected in production of animal feed maize, rubber, and sugar cane among others. Other trends include the adoption of some production techniques and technologies in the agricultural sector.

Achievements. In terms of food supply, Laos was able to meet the basic demand of society for rice production at 3 million tons per annum. The cultivation of food crops such as maize, taro, fruit, and vegetables, continued to grow moderately, while livestock and fishery have been expanded considerably - growing at 5 percent per annum due to support from transformation into new practice. In terms of commercial production, the outstanding crops are coffee, cassava, maize and sugarcane. With coffee increasing from 52,010 (FY2010-2011) to 92,045 (FY2012-2013) tons. Meanwhile, maize increased by 2 percent or from 917,715 (FY2010-2011) to 994,750 tons (FY2012-2013). The production of cassava increased from 743,190 (FY2010-2011) to 1,254,188 tons (FY2012-2013).

Challenges remain, with agricultural sector dominating the labor market and low labor productivity, small plantation plots, and limited use of machinery for agricultural development among them. Additionally, rural communities have been affected positively and negatively by various developments. While cash crops production is expanding primarily for exports, income is not stable and there is risk for food insecurity. Not all households have benefited from commercial agriculture.

Agricultural Development Strategy toward 2025. The vision for Laos is: “Ensuring food security, producing comparative and competitive agricultural commodities, developing clean, safe and sustainable agriculture and shift[ing] gradually to the
modernization of a resilient and productive agriculture economy linking with rural development contributing to the national economic basis." The 4 goals associated with the Agricultural Development Strategy are (1) The improvement of livelihood of the people; (2) Increased and modernized production of agricultural commodities; (3) Sustainable production patterns; and (4) Sustainable forest management. In support of the goals, are eight programs: (1) Food production; (2) Commodity production and farmer organizations; (3) Sustainable production patterns, land allocation and rural development; (4) Forestry development; (5) Irrigated agriculture; (6) Other agriculture and forestry infrastructure; (7) Agriculture and forestry research and extension; and (8) Human resource development.

Dr. Sacklokham concludes by stating that the country’s rapid economic growth has been beneficial for the majority of the population, however, the growth has not benefited some of the poorer groups, especially those in geographically hardship areas, where poverty rate has increased. Change in economic structure includes a decline in the share of agricultural sector in GDP and reduction of labor in agriculture sector, and a transition from subsistence to market oriented agricultural production holds risk of instable income due to instable demand and price, and food insecurity. Lastly, the government Agricultural Development Strategy toward 2025 prioritizes the food security for all population with sustainable production and modernization.
iii. Myanmar

Ms. Ngu Wah Win
Policy Coordinator/Analyst, Center for Economic and Social Development (CESD)

Ms. Ngu Wah Win started her case study with an overview and background of Myanmar’s Agriculture Reforms. Recent initiatives include the first 100-days and ministerial merger of the new government. The new government includes a policy of raising the quality of life of the majority of the people which is reflective of the 12-point principles of:

- Balanced growth of agriculture and industry;
- Financial inclusion for households, farmers, and business;
- Freedom of economic choice for every citizen;
- SME development support for inclusive growth and job creation; and
- ASEAN economic integration and linking regional growth paths.

She stresses that structural reforms were made to overcome deep seated poverty but results were not satisfactory in reducing poverty of farmers. She stated that the mode of production is at subsistence level and that they could not diversify or integrate into the market effectively. The largest agricultural commodity export of Myanmar is beans and pulses which are traded to India through Singapore. Challenges faced by small-scale farmers include: inability to get full support from government in terms of finance; not fully developed input markets; low technology; poor quality seeds; no linkage with
global value chains, unstable demand and price fluctuations, and complicated transactions through Singapore.

To improve the situation, three propositions for a New Vision contain:

- Farmers and agribusiness supply chains will be driven by the market
- The agribusiness supply chains will be led by small farmers and SMEs spurred by larger domestic and foreign firms
- The agribusiness supply chain will be shaped by a three-pillar strategy that embraces:
  - Small farm production: open decision-making by small farmers, producing a wide range of agri-food products
  - Input markets: supported by responsive input suppliers, productive technology, access to financial services, and knowledge and information service providers.
  - Output markets and supply chains: reliable, efficient access to output markets and value chains

She discusses that each pillar will have policies to support the move from Rice Bowl to Food Basket – the liberalization of agriculture through foreign direct investment. These policy pillars are:

- Pillar One: Promotion of farmer choice
- Pillar Two: Increase property rights and ability to rent, sell, and buy land; liberalize agricultural input markets; create enabling environments for private provision of credit; move toward establishment of water markets; integrate diversification, sustainability, and risk management into agri-food systems; and promote supportive business environment to encourage expansion of rural non-farm employment.
- Pillar Three: Withdraw government from food marketing; liberalize foreign direct investment in the agri-food sector; improve the business, trade, and investment climate such as loosen commercial regulations, liberalize trade quotas, tariffs, internal taxes, eliminate red tape to reduce transaction costs, strengthen intellectual property rights, food safety, product quality grading and standards, and other investor and consumer protections.

To conclude, Ms. Win states the need to set priorities and sequences of reform which will depend on the understanding of assigning responsibilities across the new government, fiscal constraints, and the degree of complexity. She stresses that some decisions need immediate attention but will take time to
unfold and that the Ministry is doing its best but institutional engineering is critical to the country’s reform.

iv. Philippines

Dr. Majah Leah V. Ravago
Professor, School of Economics, University of the Philippines Diliman

The presentation of Dr. Majah Leah V. Ravago came from a previous study entitled the Current Structure and Future Challenges of the Agricultural Sector. In that study, the take-away messages were that the bedrock of current Philippine growth was in stable macro-fundamentals since early 2000 and that the remaining problem was in the micro-front. This structural nature of change should consider:

- Raising agricultural productivity is key to healthy structural transformation.
- Agricultural development remains a powerful source of poverty reduction notwithstanding rapid urbanization and non-farm growth.
- The food security objective can be better achieve by shifting policy focus to efficiency-enhancing measures, e.g., R&D, road network, irrigation, flood control, well-defined property rights.

Dr. Ravago mentioned that the Philippines skipped the expansion of industry and instead services grew faster, with a relative decline in the agricultural sector. She pointed out that
living standards improve through high quality employment and increased incomes. She highlights that incentives matter especially as labor productivity in agriculture has stagnated and is lowest among the sectors. Structural transformation in the Philippines is characterized by labor moving away from low-productivity agriculture to another low-productivity service sector. In agriculture, output growth reflects the structural nature of the agriculture sector – a pattern of low productivity. She mentioned that situation of crops is a microcosm of the agriculture sector. Rice and corn productivity rose while all other crops stagnated. Total Factor Productivity for agriculture has decelerated after a high growth in the 1970s. She also mentioned the contradiction from trends seen in developed countries for Philippine data on food consumption. Here, as incomes rise, the share of food to total household budget should decrease, however, it was observed that the decrease was marginal. She states that an explanation could be economic growth that was accompanied by rapidly rising income inequality where consumption patterns for the rich and poor are markedly different and making growth highly exclusive. In fact, she stated that the average food consumption pattern of the entire population doesn’t correlate with average income levels, as reflected by per capita GDP. Other observations made were that consumer food prices have tended to rise faster than non-food prices, and that CPI movement for the poorest 30 percent of the population was even sharper and the contrast for rice even sharper again, negating any gains made as rice constitutes a bigger proportion of the food budget of the poor. Filipinos are not benefitting from a decline in staple prices in the world and pay more for their staples compared to their neighbors.

Dr. Ravago articulates the concern that poverty as a phenomenon is experienced most by those working in agriculture. She highlights the fact that since the late 1990s there has been virtually no progress in reducing poverty in the Philippines but that when measured through multi-dimensional poverty, the country has done better. She declares that food sufficiency and unequal access to basic social services are two key policy and governance issues to be considered. In conclusion, Dr. Ravago emphasizes stable macro-economic fundamentals as the reason for the country’s success in the past decade and in moving forward the country needs to address the micro-constraints to growth and rural development, which she enumerated as:

- Food Sufficiency Policy,
- High Transaction Costs,
Unequal Access to Basic Social Services, Continuing Challenge Property Rights Reform, and Climate Change, Natural Disasters, and Agriculture.

v. Vietnam

Dr. Tran Cong Thang
Vice Director General, Institute of Policy and Strategy for Agriculture and Rural Development (IPSARD)

The presentation of Dr. Tran Cong Thang is encapsulated by a characterization of the agricultural transformation in Vietnam, their experience with market integration, understanding the challenges and moving forward with agricultural restructuring.

Dr. Thang stated that agricultural transformation for Vietnam was characterized by a reduction in agricultural employment, nominal changes in agricultural GDP share, and typical patterns of transitioning of increased agricultural value added per employment. He noted the low growth rates in agriculture compared to other sectors but that despite the nominal decline it was for most part quite stable. Within agriculture he marked a decline in crops and an increase in fishery. Other trends included rapid expansion in production, with aquaculture seeing the highest growth, and diversification of the agricultural sector upon opening of the Vietnamese economy. Rice and coffee production stabilized after 2000. Diversification has also occurred in rural household income with a reduction in the share of agriculture and an increase in the portion of income
deriving salary or wage. Meanwhile, poverty reduction has been successful but has tapered off in recent years. Among all sectors, agriculture is unique in its ability to create a trade surplus, with agricultural trade balance a positive.

Vietnam is a highly ranked agricultural exporter – it is number one in the world for cashews (shelled) and black pepper. Success in agriculture was achieved by farmers working hard, smart, and innovatively, by enterprise; investments from the government in infrastructure and science and technology; economic integration; and policy reforms. Household economy reforms included letting the farmers themselves become real owners of land – creating a true land market; developing SMEs which now number about 6,000 cooperatives serving 10 million farms. Reform policies include free trade, linking the rural economy with national and the international economy and market; management of natural resources – such as providing land certificates to farmers so they are able to use land as capital; investments in rural developments and agriculture – such as in research and development and rural credit; and lastly, launching of rural development programs such as the loan program and jobs creation for the poor.

Market integration for Vietnam began in 1995 with the ASEAN and leads to the ASEAN AEC in 2015. Vietnam is also party to the Trans-Pacific Partnership Agreement. There has been a fast and intensive integration of Vietnam concluding four Free Trade Agreements (FTAs) with 45 different economies. Agricultural trade of Vietnam with ASEAN has increased with the trade balance negative, while, share of agricultural export from Vietnam to ASEAN has stagnated.

Challenges facing Vietnam include a decline in agricultural growth as a limit on current resources have been reached, low investments in agriculture compared to industrial and service sectors; very low productivity in agricultural labor; highly fragmented land where 60 percent of farmers have less than half a hectare or less to farm; inefficient value chains; limited labor absorptive capacity. Additionally, there are issues on food safety, law on competitiveness, the environment, climate change, and disasters.

His concluding statements touched on agricultural restructuring by:

- moving from supply driven to demand driven agriculture,
- from extensive development (quantity focus) to intensive development (high quality and value added),
- from agriculture production only to rural development combination,
▪ from resources utilization to sustainable development,
▪ from state management only to harmonizing and diversifying stake holders in economic activities, and
▪ from partly open to actively integrating in the globalization process

Lastly, he mentioned the following priorities for the agricultural restructuring strategy:

▪ Institutional reform:
  – Commercial farm development (land consolidation)
  – Horizontal (farmer group, cooperative, association) and vertical integration (value chain linkage)
  – Cluster establishment: gradually

▪ Science and technology development: engine of growth for agriculture

▪ Agri-business development/ private investment attraction

▪ Government Investment restructuring:
  – Before: focus on hard infrastructure (irrigation), rice
  – Now: Science and technology, other crops, climate change adaptation
vi. Discussants’ Remarks

Dr. Kevin Z. Chen
Senior Research Fellow, IFPRI

This is a great platform for different countries to share their experiences and to discuss different challenges faced by them due to differing levels of development. The relationship between transformation and integration should be studied for causality. Trade-offs occur when encouraging market integration and there is a need to manage the situation of gainers and losers – a highly contextual activity. The following are important to consider:

- A broader policy to support social protection and social services in response to rapid transformation and market integration to address possible adverse outcomes associated with market integration even if there are overall gains;
- Reduced agricultural yields from a slowing down of investment in infrastructure leading to poor irrigation and roads puts a constraint to growth;
- A need to improve input services, develop import service sectors, access to markets, and address organizational innovation concerns in the private sector, farmers organizations, and NGOs;
- How to retain more value and figuring out the missing link in agricultural value chains;
- Recognizing the importance of both inter-ASEAN trade and ASEAN external trade in the ASEAN market integration, especially trade with China; and
• Watching China closely with regards to the China Asia Forum and the Chinese-led initiatives such as the AIIB.

Dr. Ram Upendra Das
Professor, Research and Information System for Developing Countries

Agricultural transformation and market integration, food security, and inclusiveness are all interlinked and are prominent in this project and can all be studied through the lens of trade. There are probable solutions for each and areas for reflection:

• A global perspective is required for domestic and regional market integration – policies at the domestic and regional level are inextricably linked to global policy.
• Food security is not only linked to agriculture but to everything else, thus it is imperative to see the entire issue with a wider scope as it related to market integration, to global rules of governance, and implications to developing countries.
• Food safety can contribute to the integration process.
• Inclusiveness is integral to the SDGs, specifically food security through employment generation. Income security is key to poverty reduction. Therefore, food security must be viewed from a financial inclusion standpoint. Food security can be an instrument for agricultural transformation whereby employment guarantees inclusiveness – and with proportional growth and scale can ensure food security.
Transformation in the food and agricultural systems has been happening primarily as a response to changing lifestyles that influence growth in demand and its changing structure. Analysis of production data by commodity would show that declining share of area devoted to key staples are offset by an increase in those devoted to high value crop, including a rising share of total value production of livestock.

Differing rate of agricultural transformation across ASEAN can be reasoned through physical constraints such as size and geographic features hindering accessibility to neighbors; meanwhile environmental constraints include natural resources degradation and the threat of climate change; socio-economic constraints such as social and ethnic conflicts, feminization, decreasing farm size and rising labor costs; and policy and constitutional constraints.

The challenge lies with the approach to deliver greater improvement in food security and maintaining environmental stability. A comprehensive approach for all stakeholders in the supply chain is needed. Encouraging biotechnology, development of better soil, and considering water management practices versus expanded irrigation and fertilizers; innovative financing, credit, and insurance access;
public-private partnership harmonization; and transitioning from subsistence to agribusiness development are all approaches that contribute toward developing a new approach to agricultural transformation.

Open Forum

Question: Up to what extent should we (Myanmar) pursue agricultural transformation and market integration in lieu of national interest?

Dr. Ram Upendra Das: Food security is a national interest in many countries and that is best defined by each nation according to their context – be it food security for domestic population, surplus for export, technology roles, and many more.

Dr. Zaw Oo: Late comers do not necessarily have to catch up as private sector and other institutions can contribute to leap frog development. Look for investors who want to tap into these resources and use technology. Highlight your opportunities.

Dr. Tan: Invest in the supply chain – there are opportunities to capture with technology and responsible practice value for export – it will also depend on how the farmers themselves adopt the technology to be able to export the crop.

Dr. Khin: Consider a strategy to diversify rice and learn from lessons in case studies such as those from Vietnam in diversifying commodities.

Dr. Thang: Vietnam has had it successes but also encountered problems and learned from them. Even when Vietnam was among the top rice exporters in the world, we still encountered problems and continued to learn from other country examples. Vietnam invested heavily in the whole supply chain especially in technology such as rice varieties. Problems that Vietnam encountered include inconsistent rice quality in small plots and difficulty in diversifying from rice to non-rice crops. Institutions and the private sector are also key in ensuring success.

Dr. Fabrizio: Observing the traditional negative relationship with size of farm and productivity puts the competitiveness of smallholders at the forefront of the issue in market integration. A farm sector that is losing competitiveness creates pressure for not opening to imports.
vii. Remarks by the Chairperson and Co-Chairperson

Chairperson
Dr. Zaw Oo  
Executive Director, Center for Economic and Social Development (CESD), Myanmar

Co-Chairperson
Dr. Maria Cristeta N. Cuaresma  
Program Head for Graduate Education and Institutional Development, SEARCA

Each country has its own situation – some countries have certain similarities and some differences too. Similarities for Cambodia, Myanmar, and Laos include the lack of mechanization and raw technology, access to loans, access to markets, and a lack of an enabling environment for policies to support agricultural transformation. For most countries, agricultural growth is diminishing with growth in industry and service sectors increasing. Differences include low diversification in crops for Cambodia versus high diversification with Vietnam or Lao PDR and the Philippines experiencing rapid growth vs Myanmar which is starting to set priorities and reforms through its new government.

There should be policies in place to address adverse outcomes in agricultural transformational and market integration; there is a need to recognize the linkages among agricultural transformational and market integration, food security, and inclusiveness. Agricultural transformation is already happening in the ASEAN and varies according to demography, infrastructure and market facilities, natural resource degradation, and the like.
c. Session 3: Recent and Ongoing Initiatives within ASEAN on Food Security and Inclusiveness

Mr. Yolando C. Arban, Chair for Session 3, set the stage for discussion by outlining a few realities on the ground. These included the age of farmers, averaging at 57 years old, and that the current generation of farmers are dying out. The young are leaving rural areas and farming is not seen as a rewarding profession. Lands used for agriculture are shrinking due to industrial growth, planting of biofuels and other non-food crop, and are being converted for other purposes such as commercial enterprises, tourism, and real estate development. Inclusiveness and linking small supplier and producers into value chain are crucial in this discussion. Issues regarding this include:

- How to bring in voice of microentrepreneur and small farmer in the discussion of the whole value chain and give smallholder the ability to influence and the power to negotiate; and
- How to share in the rewards and benefits in terms of margin ladder – as the ladder goes up the margin goes higher for those at the top.

Dr. Doris Capistrano
Regional Advisor to ASEAN-Swiss Partnership on Social Forestry and Climate Change (ASFCC), and SEARCA Senior Fellow

Dr. Doris Capistrano presented the vision for ASEAN cooperation in food agriculture and forestry towards 2025. She mentioned that SPA for FAF was an incremental move meant to elaborate new context as they relate to the global agenda with the vision of strongly linking to the SDGs, particularly with regards to the social pillar, as well as recognizing the Paris Agreements. The vision is: “A competitive, inclusive, resilient and sustainable Food, Agriculture, and Forestry (FAF) sector integrated with the global economy, based on a single market and production base contributing to food and nutrition security and prosperity in the ASEAN Community.” The goals include:

- Ensuring equitable, sustainable and inclusive growth;
- Alleviating poverty and eradicating hunger;
- Ensuring food security, food safety and better nutrition;
- Deepening regional integration;
- Enhancing access to global markets;
- Increasing resilience and contributing to mitigation and adaptation of climate change, natural disasters and other shocks; and
- Achieving Sustainable Forest Management (SFM).
Dr. Capistrano emphasized the aspect of cooperation and working jointly on seven priority areas of cooperation:

1. Enhance quantity and quality of production with sustainable, ‘green’ technologies, resource management systems, and minimize pre- and post-harvest losses and waste;
2. Enhance trade facilitation, economic integration and market access;
3. Ensure food security, food safety, better nutrition and equitable distribution;
4. Increase resilience to climate change, natural disasters and other shocks;
5. Assist resource constrained small producers and SMEs to improve productivity, technology and product quality, to meet global market standards and increase competitiveness;
6. Strengthen ASEAN joint approaches on international and regional issues affecting the FAF sector; and
7. Promote sustainable forest management.

She also stated the need for cooperation on the 57 action programmes. Some of which include discussions of integrated land use planning, increase private sector participation in policy discussions, programmes and project formulation, research and development; increase research and development in climate smart agriculture and fisheries; promote the exchange of knowledge on implementing SFM and improve forest governance; and effectively implement the AIFS Framework and the SPA-FS, 2015-2020, among others. She mentioned that the implementation of the Strategic Plan (SP) and coordination with all ASEAN Bodies will be carried out by the ASEAN subsidiary bodies under AMAF; and the AMAF, with support of the SOM-AMAFA, will provide policy guidance. Clear, quantifiable key performance indicators will be formulated at the onset for all SPs and associated activities and measures and a Mid-Term Review will be carried out in 2020. Dr. Capistrano also articulated the need for champions and opening will be identified so that the correct doors are opened as the structure of the ASEAN Cooperation in Food, Agriculture, and Forestry is complex.

Dr. Capistrano mentioned that the ASEAN integrated food security framework (AIFS) aims “to ensure long-term food security and nutrition, to improve the livelihoods of farmers in the ASEAN region” and has seven objectives:

1. To sustain and increase food production;
2. To reduce postharvest losses;
3. To promote conducive market and trade for agriculture commodities and inputs;
4. To ensure food stability;
5. To ensure food safety, quality and nutrition;
6. To promote availability and accessibility to agriculture inputs; and
7. To operationalize regional food emergency relief arrangements;

It also comprised five components, namely: Food Security and Emergency/ Shortage Relief; Sustainable Food Trade Development; Integrated Food Security Information System; Agricultural Innovation; and Nutrition-enhancing agriculture development. Nine thrusts have also been identified:

1. Strengthen Food Security, including Emergency/ Shortage Relief Arrangement;
2. Promote conducive food market and trade;
3. Strengthen integrated food security information systems to effectively forecast, plan and monitor supplies and utilization for basic food commodities;
4. Promote sustainable food production;
5. Encourage greater investment in food and agri-based industry to enhance food security;
6. Identify and address emerging issues related to food security;
7. Utilize nutrition information to support evidence-based food security and agriculture policies;
8. Identify policies, institutional and governance mechanisms for nutrition-enhancing agriculture development in AMS; and
9. Develop and strengthen nutrition-enhancing food, agriculture and forestry policies/programs and build capacity for their implementation, monitoring and evaluation.

In closing, Dr. Capistrano stated that more than 50 activities have already been identified; AMAF, supported by ASEC, will implement the AIFS Framework SPA 2015-2020; a midterm and final evaluation shall be conducted, respectively in 2018 and 2020; and lastly, lead agencies to implement the SPA 2015-2020 are to be clarified.
ii. The Rice Bowl Index- Measuring the Robustness of Food Security Systems

Dr. Andrew Powell
Director, The Rice Bowl Index Secretariat and Chief Executive Officer, AsiaBioBusiness, Pte. Ltd. Singapore

Dr. Andrew Powell frames his presentation considering the nature of the measurement of food security. He offers the four dimensions of food security conceptual model which are Availability (Primary production of Crop or Livestock), Access to Market Supply Chain, Access to Food (Income), and lastly Utility (Safety, Quality, and Nutritive Value) to provide context. He said that non-traditional security issues in food security should also be examined and these are: Water Security, Irregular Migration, Environmental Security, Energy Security, and Transnational Crime.

In measuring food Security, he stated that there is a large universe of open data available but that much of the metrics or indices available are complicated or not entirely useful. He highlights the problem of using a system such as the EIU-Dupont Security index. The index uses affordability, availability, and quality and safety as measures for food security and provides an overall score which ranks countries on their food security or insecurity. However, ranking itself is a problem, as food security is not a competition but instead is a human right and therefore the idea of ranking can be trivial. Additionally, the ranked countries have more problems with food security than their
rankings imply – take for example the USA where in New York alone there are 1 million malnourished people; or Singapore which is at third place overall yet imports 90 percent of their food; while Australia experiences damaging fires and drought. Indices should be taken into context – environmental challenges, geographical, and others. However, these indices are good at raising awareness and starting a discussion on food security amongst the public.

Dr. Powell then introduces the Rice Bowl Index (RBI). The RBI distills information from these numerous public sources, with an ultimate aim of facilitating concrete action based on a measurement of the robustness of Food Security systems. Robustness is defined as the capacity to withstand disruptions to the multiple dimensions of food security, thereby ensuring an acceptable level of stability commensurate with local needs. He then compared robustness to resiliency, where resiliency is bouncing back to a status quo after a disruption, robustness means coming back stronger. He also said that food security required a balanced approach beyond just food production. The RBI endeavors to shift the focus of the debate from problem to solution; support and facilitate an evidence based, positive, and productive multi-stakeholder dialogue, collaboration and action; and be a platform to support partnerships with government, food value chain, NGOs, and others. The RBI comprises four categories (Figure 3): The Farm-Level, Policy and Trade, Environmental, and Demand and Price. Each category has enabling and disabling factors of food security and each category has eight or so metrics and proxies.
Dr. Powell stated that the RBI is used to inform policy makers and encourages collaboration. The ability for forward projection to run ‘what-if’ scenario analysis; visualization of some of the key enablers and disablers of food security; providing points of discussion to facilitate constructive and solutions-focused conversations; supporting quantitative and qualitative analysis of food security systems across Asia; and encouraging greater levels of collaboration across all stakeholder groups are all ways the RBI has been used to inform policy makers. For comparing across countries, a desired threshold is set at one standard deviation below the average performance of the top quartile. Data from 2016 shows that Pakistan, Myanmar, Bangladesh, India, the Philippines, and Indonesia fall below the desired threshold, while countries like Vietnam, China, Thailand, Malaysia, South Korea, Japan, Australia, Taiwan, and New Zealand place above the desired threshold. In finishing, he stated that currently they look at individual country analysis but have been receiving requests for regional scale analysis.
iii. Umbrella Program on Food and Nutrition Security for Southeast Asia

Dr. Paul S. Teng  
Adjunct Senior Fellow, RSIS and Senior Fellow, SEARCA

The need to address complex challenges and threats to food and nutrition security in the region through collaboration is paramount. Dr. Paul S. Teng provides a long list of reasons for this, specifically:

- Increasing population and changing food/nutrition needs,
- Farming population is ageing,
- Increasing urbanization,
- Declining interest in agriculture among youth,
- Uneven, inequitable and jobless economic growth,
- Degradation of natural resources and water scarcity,
- Increasing competition for arable lands,
- Climate variability and extremes,
- Food shortages and price spikes,
- Globalized supply chains, and
- AEC 2015.

He stated that the program acts as a platform for collaboration, aligning the work of SEARCA with other key partners and supporting ongoing regional ASEAN level initiatives on food and nutrition security. The integrated components of the program include research and development, capacity development and graduate education, and knowledge management. A lot of time was expended to align the program and value added aspects of AIFS. The ASEAN Collaboration Landscape in Food Security includes:

- ASEAN Integrated Food Security (AIFS) Framework and Strategic Plan of Action on Food Security in the ASEAN Region (SPA-FS);
- ASEAN Plus Three Emergency Rice Reserve (APTERR);
- ASEAN Food Security Information System (AFSIS);
- ASEAN Multi-sectoral Framework on Climate Change: Agriculture and Forestry towards Food Security (AFCC);
- ASEAN+3 Comprehensive Strategy on Food Security and Bioenergy Development (APTC-S-FSBD) Framework; and
- Strategic Plan of Action on Food and Energy Security (SPA-FES).

The criteria of the Umbrella Program Agenda are value addition, relevance to ASEAN initiatives, being impactful by aligning to balance all food security dimensions, benefits from collaboration, and convergence with donor institutions.
Playing a substantial role in the umbrella program is the University Consortium (UC) under the SEARCA network. Major themes covered by the program are:

Theme 1: Food Reserves, Trade and Investment
Theme 2: Sustainable Food Production and Utilization Systems
Theme 3: Emerging Issues related to Food Security

Dr. Teng also mentioned that each major theme has subthemes populated with relevant projects and activities and their respective institutional partners. Additionally, he stressed that committing to diversifying the diet can bring attention to less-used and neglected indigenous crops, especially vegetables. He concludes by stating that implementing the Umbrella Program, wholly or partly, can likely contribute to improved capacity to address food insecurity and climate change adaptation and resiliency in the ASEAN.

iv. Farmers Organizations' Initiatives

Ms. Ma. Estrella Penunia
Secretary General, Asian Farmer’s Association for Sustainable Rural Development

The Asian Farmers Association for Sustainable Rural Development or AFA is an Asian alliance of national farmers’ organizations: 20 organizations, 16 countries, and 13 million family farmers, fishers, forest dwellers, indigenous peoples, and
Ms. Ma. Estrella Penunia introduced AFA in brief as follows:

- **Vision:** Just, free, peaceful, healthy, economically viable, sustainable and resilient farming communities in Asia;
- **Mission:** To build solidarity, raise our collective voice, and empower our members as key drivers and actors for sustainable rural development;
- **Goal:** To strengthen capacities of national farmers’ organizations leading to eradication of poverty and hunger, increased resilience, and sense of well-being of family farmers in Asia;
- **Priority Agenda:** rights to natural resources; sustainable and resilient agriculture; farmers cooperatives and enterprises; women farmers empowerment, attracting youth in agriculture; and
- **Key Programs:** Policy Advocacy, Capacity Building; and Knowledge Management along the 5-priority agenda.

AFA engagements include Global Forum on Agriculture Research, APAARI, Grow Asia Partnership Steering Committee, and GAFSP Steering Committee. Meanwhile, its current projects are MTCP2/AFOSP, Strengthening Evidence Based Advocacy of Farmers in Forested Landscapes, and Land Matrix.

Ms. Penunia shows a short audio-video presentation on agricultural transformation and market integration entitled *Pakisama*. The AVP is about the *Hacienda Pecuaria*, an 800-hectare CARP distributed land that implemented changes to adapt to the market. They converted their farming practices from chemical to organic farming resulting in higher sales of organic rice without chemical inputs, and yields increased because land is restored to its natural productive state. The hacienda is now operated as a community cooperative. They have diversified and practiced integrated farming – raising pigs, cows, and poultry.

Learning, sharing, and providing inspiration to members and other countries by farmer-to-farmer exchanges help build capacity for farmer organizations to become entrepreneurial and to consider the full value chain.

She points out that AFA Member initiatives are varied, they include:

- Teaching about sustainable processing and packaging of primary products,
- Consolidating farmers product to link and distribute to institutional, industrial, and retail markets,
Organizing savings credit groups for emergency needs and capital build-up for investments, and
Developing tools for cooperatives.

Ms. Penunia ends by remarking on lessons learned by their organization:

- Farmers cooperatives play an important role in helping farmers capture higher share of value in food supply chain;
- Improve bargaining power of their members and benefit from economies of scale;
- Reduce market risks and transaction costs;
- Expand activities in downstream stages of the food chain;
- High level institutionalized policy dialogue; and
- Technical assistance and capacity building for small and emerging cooperatives especially in the value chain.

Ms. Ma. Genesis T. Catindig
Program Officer, AsiaDHRRA Secretariat

Achieving food security necessarily means investing on family farmers. Ms. Ma. Genesis T. Catindig reiterates that poverty permeates rural family farmers. People dependent on agriculture remain the poorest of the poor and family farming-based agriculture has remained to be one of the major economic sector in the region. Despite this, the value added of agriculture in GDP is smaller compared with industry and services. Ms. Catindig points out that this is where AsiaDHHRA comes in – investing in strengthening organizations. She adds
that in the next five years, AsiaDHRRA’s work will address three key challenges:

1. The development and growth of rural people’s organizations;
2. The complementation and relationships between and among CSO and RPOs, in particular CSOs’ facilitating role in policy dialogues with government and various food and agriculture governance bodies, in the engagement with private sectors, and in their participation in public programs; and
3. The strengthening of the AsiaDHRRA network and its member DHRRAs as support organizations and agri-agencies providing services to rural people’s organizations.

Ms. Catindig enumerates three major programs that facilitate direct access of rural people’s organizations to value-chain based financing:

1. Farmers Fighting Poverty (2012-2020)
2. Post-Yolanda Fund for Local Initiatives (2014-2016)
3. Regional Cooperation to Empower Rural Development Organizations in Asia (ReCoERDO-Asia: 2016-2019)

She cites the different ways the AsiaDHRRA invests on family farmers in four priority work areas: Organization Development, Institutional Development, Policy Lobbying and Advocacy, and Market Empowerment. Social technologies are also a factor in investing on family farmers including farm planning, farmer technician services, collective marketing, and constructive engagement among others.

Among the 30 farmers’ organizations supported by AsiaDHRRA, Ms. Catindig shows an AVP of one 27-year-old farmer housewife, Hazel, who is also a typhoon Yolanda survivor and member of farmer organization supported by AsiaDHRRA. The AVP stresses the role of women as a champion for food security at the household by taking on the role of farmer entrepreneur. She has planted coconut and banana, and cacao, and intercropped pineapple, and peanut and cassava, to have a constant source of income. She has also focused not only on planting crops but has diversified into pigs, duck, goat, water buffalo, milkfish, chicken and agricultural input such as vermiculture. Previously, when her husband had no contract for landscaping work she would need to borrow money for food but now they just focus on planting and taking care of their farm - instead of money going out, money is now coming in at home. Hazel says that being a housewife is not a hindrance to becoming a farmer and doing business. She said that rural
women could have greater contribution to food security in post-disaster situations.

Ms. Catindig declares that there are good and bad experiences in the process of working towards inclusive rural transformation and provides three key statements to conclude her presentation:

1. Investing on family farmers could spur rural development and inclusive rural transformation;
2. Family farmers need access to: decision making, resources (i.e. land, water), financing, agricultural inputs, technology, and, training and extension services; and
3. Fundamental to these success cases is the role of organized groups.

v. Discussants' Remarks

**Dr. Roehlano M. Briones**
*PIDS*

The theme on food reserves is a strategic concern and Dr. Briones wonders on the possibility to explore nutrition more profoundly under the sustainable food production and utilization system for strategic thrusts 7-9 of the AIFS. He also noticed that the Umbrella Program seems to have a strong policy orientation especially with food security concerns; while he proposed that the University Consortium become a platform for dedicated research in food security which can complement the technical studies-heavy sub-theme 2. He gave his preference for natural science-based research among partner institutes – in addition to policy fields, among others. He also mentioned that genetic resources, indigenous food and collaboration towards meeting the SDGs is something the Umbrella Program can consider. Lastly, he enjoined Filipinos to learn from other countries especially in taking advantage of opportunities associated with agricultural value chains.

**Dr. Devesh Roy**
*Research Fellow, IFPRI*

Dr. Roy posits that if there is to be an evaluation in 2020, then it would require a baseline that will be useful data for the AIFS. He also asks some questions about the Rice Bowl Index:

- What is the rationale behind the name?
- Why are some elements in the categories called non-traditional?
• How are the weights technically derived and is the index sensitive to weight?

He also notes that when projections are made they can be fraught with danger, especially if methods and forecasts are made to incorporate bias – and he proposed that additional clarity on the technical issues be made on the process.

Regarding the Umbrella Program, he questions the need for such a complex structure. He also affirmed the role of indigenous crops in the paradigm shift of agriculture and in their promotion to contribute to the nutrition and health agenda.

On the presentation of the farmer organizations, he was interested to know how the model of farmer federations unraveled – including considerations of sustainability and social networks. Additionally, he added that food certification such as those for organic produce might be better approached through intermediate standards and certifications as they are costly. He also brought up the issues of truthful labelling, especially on instances of self-certification.

Open Forum

Dr. Doris Capistrano clarifies that, as a general observation, on the purposes of the project, there is a tendency to focus on the AEC component, but issues are spread across the ASEAN technical working groups and there are alternative entry points for other mechanisms. She also touches upon the multi-sectoral frameworks on Climate Change that brings together issues and new mechanisms such as the Climate Resilience Network which brings together climate smart agriculture initiatives and other concerns about the agriculture sector that go beyond agriculture. She also highlighted the politics of policy making, distinguishing between rhetoric within countries and regionally – there is one essential perspective: bringing different viewpoints and important contributions together to make a fresh perspective. Of concerns on smallholder productivity, you need to define productivity clearly which may include non-tangible contributions such as eco-system services. She also discussed how empowering farmers’ organizations can provide productivity gains and institutional transformation gains that have potential to shift terms of debate away from a zero-sum game mentality of gainers and losers. She also mentioned that when thinking of engaging the private sector we must remove our tendency to think of large corporations; in fact, 89 percent of employment is brought by smaller corporations and SMEs – and policy should address the aggregate of this concern.
Additionally, she points out the difficulty of inserting small sector farmers to benefit from market integration when in many instances it runs counter to their interests. For indigenous peoples, it is about turning commodities into commercial products devoid of their cultural context. There are cultural and intellectual property rights that need to be respected. Additionally, ways to enable the creative industries to promote these cultures can help in that concern. She also mentioned the need to create spaces for local communities without needing to scale up but bringing them together and empowering them in ways the market can interact with – creating markets that tend to homogenize without being homogenous.

Dr. Andrew Powell clarifies that their Washington partners are not just number crunchers but do substantial analysis.

Dr. Fabrizio Bresciani stated that he is more confident about the future when discussions about rice self-sufficiency policy include non-market elements to develop market chains. He calls attention on how to include natural resource scarce environments and social considerations into value chains to achieve the outcome on inclusiveness. He emphasizes that the consideration of inclusiveness should become more prominent at the regional level, especially when we talk more and more about greening the value chain. There is an intuitive discussion among governments in the region going beyond traditional schemes in food security. He reiterates that talking about new ways of value chain interaction with the environment, natural resources, and social issues, we need to investigate this beyond value chains and look at the spaces and landscapes where these occur. Therefore, the landscape approach is important to develop and manage natural resources and sourcing inputs for agriculture. Lastly, he emphasized going about finding ways to organize producers in a landscape to obtain geographic indication or collective trademarks for their products but such will require harmonization of regulation among countries.

Dr. Paul S. Teng stated that intuitively we must look beyond landscapes as natural sciences is a small part of the solution. With regards to certification, the whole industry should be involved in this – branding depends on national acceptance, and even more important is regional acceptance.

Ms. Penunia stated that commercialization makes certain indigenous item expensive to a point where local people cannot anymore afford their own products. A way should be
found for smallholders to still benefit from commercialization without disrupting availability in local market.

vi. Remarks by the Chairperson and Co-Chairperson

Chairperson
Mr. Yolando C. Arban
Consultant, SEARCA-IFAD Institutional Partnership

Co-Chairperson
Dr. Nicholas W. Minot
IFPRI

Mr. Aban congratulated the participants for an active and engaging session, especially the enthusiasm of the discussion. He stressed the challenges ahead and that there is ample opportunity to discuss them further in the workshop.
d. Session 4: Role of Private Sector in Agricultural Trade and Market Integration

Dr. Pramod K. Joshi introduced the session by highlighting the focus on the private sector in agricultural transformation and market integration. He stressed that the private sector role is critical for the entire value chain and its success depends on many factors – especially enabling policies. Another point he made was the degree to which the private sector was sharing the benefits to the farmers.

i. Inclusive Agribusiness in Southeast Asia

Dr. Nerliita M. Manalili
Managing Director, NEXUS Agribusiness Solutions

The presentation of Dr. Nerliita M. Manalili is part of a study commissioned by the Commonwealth Scientific and Industrial Research Organization (CSIRO) of Australia to SEARCA for the Roundtable on Inclusive Agribusiness in Southeast Asia held in Ho Chi Minh City, Vietnam in Sept 2015. The study considers emerging practices, mostly private-led, and explored trends in the shape, function and success of inclusive agribusinesses across Vietnam, Indonesia, Myanmar, and the Philippines. The four countries were chosen since they are major agricultural producers of staple crops, primarily rice and each country is the world’s biggest supplier of at least one major commodity. She described the agricultural development of the countries as following one of either two paths:

- Indonesia and the Philippines: this followed self-sufficiency to import substation and agricultural growth
mainly from area expansion. Followed by agro-
industrialization and directing investments in increasing 
food crop production. Lastly, trade liberalization bringing 
in much needed investment.

- **Vietnam and Myanmar**: Both emerging from close, 
isolated economies, passing series of reforms and 
adopting market-oriented strategies.

In the study, there are 62 (56 percent) initiatives by the non-
private sector compared to 49 (44 percent) by the private 
sector. For the non-private sector, inclusive business initiatives 
are fairly distributed among Private (29 percent), NGO (25 
percent), and Public (29 percent), with Farmer Organizations 
having a smaller share (7 percent). In the private sector, 
initiatives for the private sector dominated (43 percent) with the 
rest taking a smaller portion: NGO (27 percent), Public (16 
percent), and Farmer Organizations (14 percent). Dr. Manalili 
points out that the non-private sector partners more with public 
sector while the private sector partners more with their own 
sector.

Dr. Manalili presented six case studies from Indonesia, Myanmar, 
the Philippines, and Vietnam. The Indonesia case study 
featured a mobile banking initiative for cocoa farmers, the 
Myanmar case study featured a capacity building project with 
a private corporation assisting farmers in the dry zone of the 
country, while the Vietnamese case study was a pilot project on 
sustainable coffee production through the adoption of 
appropriate techniques in cultivation and processing. Three 
case studies were from the Philippines: the first was, a 
combination of capacity building and mobile banking for 
coffee farmers partnering with a private mobile telecom 
corporation and a national bank; the second was a Farmer 
Entrepreneurship program aimed at improving the income of 
small farmers by linking them to the largest food chain in the 
country that needed large quantities of vegetables and rice; 
and the third project is the employment of coconut textile 
technology to produce geo-textiles for erosion control and 
slope protection.

Key features across case studies included:

- the critical role external support played for smallholders 
to be partners in inclusive agribusiness;
- meeting market requirements for sustained market 
access;
- a training component to increase product quality;
- adoption of inclusive agribusiness for improved smallholder welfare and raw material sourcing benefits to agribusiness firms;
- access to assets results in increased yield and value benefits for smallholders; and
- an enabling environment is present but fragmented.

Dr. Manalili said the study shows that certain factors at the country level supported the success of the case studied, these are divided into four levels of growth, namely growth due to (1) world’s growth, (2) geographic specialization, (3) product specialization, and (3) enhanced competitiveness. All four countries in the study experience growth due to the world’s growth, Only Indonesia experienced growth due to product specialization while the rest saw a decrease. Only the Philippines saw a decrease in growth due to geographic specialization while the rest saw an increase. Lastly, all countries experienced growth due to competitiveness, with Vietnam taking the lion’s share, except for Indonesia which saw a heavy decline. Additionally, Dr. Manalili highlighted other concerns:

- that success with ICT is patchy and the question of scale, adoption and relative benefit need to be addressed to the smallholders;
- more research is needed on the relative success of intermediary-initiator relationship;
- support should include other stakeholders in supply chain for true inclusiveness;
- tailor and custom-made support in terms of resource needs per smallholder type, location, and commodity to ensure success;
- multiple country investment brings expanded partnerships but the need for clearer objectives arises;
- review and identify which national policies help or hinder inclusive agribusiness;
- targeted public investment should be considered to address lag in public sector activity;
- human and social capital is beneficial and should be maximized through partnerships; and lastly
- inclusive agribusiness requires multifactor consideration of multi-sectoral issues.
ii. Inclusive Value Chains Programs of Grow Asia in Southeast Asia

Mr. Salvador D. Umengan
PPSA Coordinator, Grow Asia

Grow Asia’s aim is to provide food security for all in an environmentally sustainable way while generating economic growth and opportunity. Mr. Salvador D. Umengan stated that Grow Asia was established by the World Economic Forum (WEF) in collaboration with the ASEAN for concerns about how to feed the millions of people in Asia. Grow Asia is a multi-stakeholder platform part of a wider network around the world. Their goal is to reach 10 million smallholders by 2020, improving by 20 percent yield, farmer profitability, and the environment. He also mentioned that inclusive business is also an objective and other guiding principles are market-led, focused on the smallholder farmer, and country-led and locally driven. Its value proposition lies in benefits for research, donors, government, civil society, and farmers’ associations and companies. Companies benefit specifically by developing new markets, share investments and risks, and develop value chain partners and solutions.

Mr. Umengan presents the example of a corn project in the Philippines to illustrate the value proposition. The project was to build a competitive supply chain of yellow corn feedstock from smallholder corn fields in Zamboanga Peninsula to Batangas Region 4A Cooperative of feed millers and small hog raisers. Mr. Umengan stated the objectives as poverty reduction through increased productivity and incomes for smallholders (corn farmers and livestock raisers); corporate business development
converging with farmers’ participation in the supply chain; access to markets, technologies and farm credit; and conservation of soil and water resources and the environment. There were at least 15 active partners taking different roles such as bank for farm credit, input suppliers, farm mechanization, post-harvest and logistics, development corporations, NGO and civil society, Policy Advocacy Groups and agencies, and Customer End User. Mr. Umengan said that small hog raisers in Batangas supplied 10 percent of meat to Metro Manila but their supply of feed coming from the northern region from Metro Manila was insufficient and they required a stable supply. The project succeeded in providing a stable supply with a supply chain cost 50 centavos cheaper than the regular two-peso cost to supply corn feed by land. He mentioned that now the feeds can be sourced within the country rather than import from outside bringing benefits to smallholder farmers in the southern part of the country.

Some insights Mr. Umengan provide are the following:
- End to end development of the supply chain considering production all the way to consumers usually does not work if you only concentrate on production.
- This is a good example of corporate business development converging with farmer participation in the supply chain.
iii. Private Sector Initiatives

Dr. Tan Siang Hee
Executive Director, CropLife Asia

Dr. Tan Siang Hee presents an IFPRI study that identified the role and impact of agricultural technologies in 2050 on global, regional and local scales in the following areas:

- Agricultural yields & production;
- Food prices;
- Imports & exports;
- Hunger risk & childhood malnutrition; and
- Natural resource use (land, water & nutrients).

He shows the technology assessment scope for eleven technologies which are: No-Tillage, Integrated Soil Fertility Management, Organic Agriculture, Precision Agriculture, Crop Protection, Drip Irrigation, Sprinkler Irrigation, Water Harvesting, Drought Tolerance, Heat Tolerance, and Nitrogen Use Efficiency; on three crops: wheat, rice, and maize. He discusses how technology is used as the next step to increase productivity and to address climate change. He mentions that these technologies take time to reach the market and gives examples such as 11 years for biotechnology, 13 years for drugs, and 8 years for the introduction of the Boeing 787. In the ASEAN, delivering new technology into the hands of farmers takes 16.8 years. The implication of this on value added per worker in the ASEAN economy depends on context, for example high
technological Singapore has a tremendous potential of value added for agriculture despite the country not having agricultural production. Dr. Hee points out the value of knowing where to capture value for farmers and knowing what Asia’s next domain for agriculture is.

Asia’s agricultural base is smallholder farmers who employ traditional labor intensive farming, have limited access to social media, have a generally low education level, are fragmented and small-scale, have the smallest-sized farms globally, are 85 percent of world’s 525 million smallholder farmers, and lacking of organizations to amplify their voice. Dr. Hee stresses that with challenges and limited resources, agriculture will have a crucial role to play in ASEAN’s future development. He suggests putting ASEAN farmers first to ensure long-term food security and to improve the livelihoods of farmers in the ASEAN region. He stated that objectives are to increase food production, reduce post-harvest losses, promote conducive market and trade, ensure food stability, and operationalize regional food emergency relief arrangements. Dr. Hee shares that working with ASEAN Expert Working Group on Harmonization of Maximum Residue Limits (EWG-MRLs) has achieved over one thousand MRLs harmonized with a clear majority adopted by key AMS. He cautions though that the vision of a Free Trade Zone in the ASEAN is not as quick as the EU as ASEAN sovereign rights and ratification take a long time, including dislocation between agreements and implementation within AMS. However, he encourages ASEAN countries to share resources, especially to come together to share costs of mutual assessments for a harmonized registration. He also puts forth the concern that there are more regulators retiring than those being hired.

Dr. Hee then brings his narrative to seeds. He said that improvements in the condition for farmers, increasing agricultural production, and increasing export of agricultural products need a vibrant seed sector. He suggests that the IPPC be used to get international standards harmonized and predictable and that the ASEAN share resources and capacity to bring the region to the next level of harmonization and functional environment. Lastly, he stated that technology is only one part of the solution and that buyers need to appreciate the value of what farmers produce and giving the additional margin back to them and not middlemen. Additionally, he adds that businessmen and farmers should agree on a price before planting.
Dr. Hee concludes by listing some issues and challenges ahead:

1. **Delays in ratification and alignment with domestic laws.** Some measures due for implementation have not been fully implemented. This short fall mainly results from the delays in ratification of signed ASEAN-wide agreements and their alignment into national domestic laws as well as delays in implementation of specific initiatives. An immediate priority is to improve the implementation of AEC Scorecard, that should be intensified both at the country and regional levels to ensure that the implementation gaps are being addressed. This calls for the increased commitment by ASEAN Member States.

2. **The legislative & regulatory limitations that impede commitments.** There is a need to address the legislative and regulatory limitations that impede the implementation of intra- and extra-ASEAN commitments. The ability to ratify economic agreements is an important issue as it affects the overall implementation rate of the AEC Blueprint. The ASEAN Member States have also been tasked to strengthen their respective national coordinating agency to effectively coordinate implementation across various ministries and agencies.

3. **Failure of one country may result in non-implementation of regional measures.** It can be recalled that under the AEC Scorecard, a regional measure will only be considered implemented if all the ten ASEAN Member States can implement the measures in their individual jurisdiction.

4. **Inclusive Private-Public-Govt. engagement to enhance the AEC integration.** Regular private sector engagement should also be undertaken to assess the impact and effectiveness of the policies and measures being implemented. Greater private sector engagement is needed to enhance the AEC integration process through feedback from the market participants and to address the impediments that prevent the free flow of goods, services, investments, and capital. Regular and greater private sector engagement is needed to enhance the AEC integration process through feedback from the market participants and to address the impediments.

5. **An effective and predictable regulatory environment-Science based.** Monitoring the progress of the AEC should be strengthened and should remain a priority. An effective and well-functioning mechanism to monitor the outcomes, identify issues and address implementation gaps is necessary to ensure the achievement of the AEC
targets. Hence, there is a need to further strengthen the monitoring capacity of ASEAN Secretariat and provide technical assistance to member states to enhance their implementation capacity.

He ends by saying that the ASEAN should work together to putting technology into the hands of farmers.

iv. Market Integration and Trade within and beyond ASEAN and its Influence on Food Security

Dr. Ramon L. Clarete
Professor, School of Economics, University of the Philippines Diliman

Dr. Ramon Clarete discusses intra-ASEAN trade of key food items, opportunities for deepening intra-ASEAN trade in food items, trade costs, and market integration ahead of food security. He stated that Intra-ASEAN exports and imports of all products were nearly a quarter of its overall exports to or imports from the rest of the world in the first half of 2000s. He also mentioned that Intra-ASEAN exports had not significantly increased but that it still comprises a quarter of all its exports to the World. Additionally, Intra-ASEAN imports in proportion to total imports had even declined, from 23 percent to 21.8 percent. He also stated that the share of food export to total exports of ASEAN increased slightly from 6 to 7 percent. He adds that despite the single market there has been no substantial rise in ASEAN food imports. Meanwhile, intra-ASEAN food imports
range from a low of a fifth of a percent to as high as 97.65 percent of the total. Most of imported rice, coconut oil, and palm oil are from ASEAN and larger imports which ASEAN buys from third parties are wheat and meslin, oil seeds, dairy and bird’s eggs, and fruits and nuts. Intra-ASEAN exports compared with imports are larger – they range from a low of 4.25 percent to as high as 80.68 percent of total. The larger exports are palm oil, fish, meat products, rice, fruits and nuts, coffee and tea, sugar, and coffee and tea.

Dr. Clarete stated that there are opportunities for deepening trade but that these are complicated due to high trade costs. He points out a big share potential that can still be expanded in intra-ASEAN trade. Through simulation of ASEAN Trade in Goods Agreement (ATIGA) possible effects on food exports using a SMART model, trade creation and trade diversion are identified. Trade creation is added trade created by the preferential trade liberalisation under ATIGA while trade diversion is amount of non-ASEAN exports that ATIGA replaces with intra-ASEAN exports. He highlights that if trade costs can be abstracted, there is a lot of potential movement for expansion of trade.

High trade costs dampen the flow of cross-border trade and investment. He stated that tariffs are part of policy barriers and these remain high for agriculture while they are not a major concern anymore for non-agriculture. Non-tariff measures are bigger problems as they feed into trade costs. Agriculture in general has higher trade costs than manufacturing and therefore most trade negotiations look at harmonizing the implementation of these non-tariff measures to get rid of unnecessary delays, red tape, and to facilitate trade in general. He adds that other causes of high trade cost are distance, connectivity, logistics, and policy administration barriers and restrictions.

Dr. Clarete shows the complexity of trade agreements of the Philippines as context for Market Integration and Food Security. He stated that from the 2016 ASEAN Summit are the AEC 2015, equitable economic development; and AEC 2025, a resilient, inclusive, people-oriented and people-centered ASEAN statements. He concludes that by giving some key observations:

- There is a long way to go before food trade becomes an important part of ASEAN’s single market and there are opportunities for deepening ASEAN’s trade in food items.
- The effect of ATIGA lies on trade costs and not on its tariff reduction.
- The average intra-trade costs of agricultural products of AMS range from 93.79 percent to 334 percent.
- The expansion of intra-ASEAN food trade depends on ASEAN countries reduction of trade costs which ATIGA mandates all member states to do.
- Agriculture trade costs are twice those of manufacturing.
- Distance, maritime connectivity, logistics performance, doing business market entry costs, tariff barriers, and administration cost of non-tariff measures explain trade costs levels in agriculture.
- There is synergy in simultaneous reforms - lowering trade costs tend to happen through action on a number of fronts simultaneously.

v. Discussants’ Remarks

Dr. Flordeliza A. Lantican
SEARCA Consultant on Value Chain Analysis, and former Dean of the College of Economics and Management, University of the Philippines Los Baños

Smallholder farmers are integral for economic development and agricultural transformation. Opportunities for smallholder to increase production by increasing technology and market access can lead to poverty alleviation and an increase in global food supply. Common challenges to inclusive development of agriculture include rural infrastructure development, especially in information and communication technologies. There is a need to develop railways, farm to market roads, and airports to move products faster, increase the mobility of people, and reduce transportation costs. Post-harvest and processing facilities need equal attention. In relation to Grow Asia there needs to be more conveying of issues and challenges faced by the case study and examples of coping mechanism implemented especially in terms of appreciating a stakeholder approach. The same can be applied to the Carabao value chain whose challenges included a short shelf life and substandard packaging. The solution was to partner with the Department of Science and Technology (DOST) and provide credit assistance and certification. Result of value chain study was a 100-million-peso credit line. Additionally, developing new agri-based technology takes time – it is therefore important to have substantive research and development investment – particularly focusing on post-harvest handling, processing, and marketing. Lastly, we need to learn from existing formal and informal institutions,
recognize the need for regulatory incentives and understand the role of other sectors outside of agriculture.

Dr. Andrew D. Powell  
*The Rice Bowl Index Secretariat and AsiaBioBusiness*

The number of smallholder farmers is important and can make a big difference if they are empowered to make an impact on the food system – the numbers are staggering when compared to those employed by large companies. People are important; hence we need to put enough attention to facilitating engagement and partnership of people at various levels. People have feelings, perceptions of all kinds of issues – we must think more of how we build partnerships – there is a lot of distrust on both sides and we need to be building a positive environment to help solve food security. Communicating with policymakers is important.

Dr. Avinash Kishore  
*Research Fellow, IFPRI*

We can learn from studying formal and informal institutions that promote business models – especially in the long history of informal institutions. They are everywhere and meet the bulk of farmer needs. Some have characteristics which are very needed in formal institutions. They are often spontaneous and spread everywhere without anyone needing to subsidize them or promote and empower them – they offering an example of endurance and sustainability, a more flexible institutional model to changing context that can be studies. Therefore, appropriate policy incentives should be made to work for them and the goals of food security and smallholder farmers. Regarding the corn value chain, challenges in setting up and scaling value chains would help bring more insight into what the boundaries of success and ways to expand the project. Quicker adoption of technologies can include catering to business needs and market friendly regulations that enable business environments.

Open Forum

*Question: How do we deal with national trade facilitation strategies (NTFS) as most developed countries put up complicated NTF and are differing in requirements?*

Dr. Clarete: NTFS are legitimate regulations exercised for public use but can be abused and result into becoming de facto trade barriers. This also includes red tape which is captured into
the costs of trade. International best practices should be referred to here.

Dr. Tan: Technology transfer for ASEAN farmers should be given so that they can comply with export requirements of Europe. We need to be building capacity and a regulatory environment to ease cross border trade.

Dr. Lantican: It is high time to decentralize laboratory testing facilities so that costs to export agricultural products can be reduced.

**Question:** Most value chains focus on production and not the market, please elaborate on what aspects can give us quick wins in our research approach to value chains?

Dr. Manalili: Traceability is an important aspect that research can focus on. Traceability is difficult for smallholders to accomplish especially with standards of institutional buyers and modern retailers. There needs to be more capacity building here.

Dr. Umengan: Markets are the least of the problem in the supply chain, the disaggregated number of smallholder farmers should be the focus of the solution. Institutional and corporate buyers require thousands of hectares of product but smallholders are not bankable because they are disorganized. Questions of organization include who pays for consolidating farm development services? Getting smallholders to consolidate is the largest problem.

Dr. Tan: We need a clear policy for inclusive growth as different levels of farmers need different levels of support. This comes hand in hand with building trust as food security and national security is at stake.

### vi. Remarks by the Chairperson and Co-Chairperson

**Chairperson**

**Dr. Pramod Kumar Joshi**

*IFPRI*

**Co-Chairperson**

**Dr. Maria Celeste H. Cadiz**

*Program Head for Knowledge Management, SEARCA*

Inclusiveness in agricultural transformation and market integration requires a holistic approach – which includes the whole value chain. Private sector and trade perspectives should fall into harmonization and regularization of trade and reducing the high cost of trade. Building government capacity in a harmonized ASEAN framework and building partnerships at
different levels from farmers’ organizations to the national level and across value chains into the ASEAN level are crucial.

e. Session 5: Workplan Development

i. Framework of Analysis for Developing National Strategic Plan of Action to Promote Small-scale Rural Producers’ (SSRPs) Competitiveness and Inclusion in Regional Agrifood Markets

Dr. Avinash Kishore
Research Fellow, IFPRI

The two defining challenges for the agriculture in ASEAN, ensuring sustainability and overcoming poverty, are:

1. If agriculture remains unsustainable: it will destroy lives and livelihoods; and

2. If policies for sustainable development create barriers to poverty reduction: there will be little popular support for such policies.

Transformation is underway in ASEAN economies driven by sheer GDP growth and economic development. The ASEAN is among the faster growing economies in the world experiencing increasing inequality but at the same time a decline in absolute poverty. There are changes in national polity and policy regimes, international laws, set within a context of rapid diffusion of potentially transformative technologies. In that context, there are opportunities to transform smallholder agriculture where it is
needed most to reduce poverty and inequality, produce more from less, improve resilience and sustainability, reduce vulnerability, and improve nutrition and health outcomes. The project has three activity pillars:

1. Collaborative Research,
2. Informed Policy Dialogues, and
3. Technical Assistance

Research on foundational studies occupies Year 1-2 of the project and hopes to come up with material to anchor national level workshops, strategic report on challenges for smallholder agriculture, and inputs to studies on national and regional policies. Research themes include a broad swathe of topics which include foresight research, value chains, diversification to high-value commodities, market integration, risk characterization, leveraging emerging market channels for smallholders, technology, and institutions. Policy dialogues are expected at the national and regional levels anchored by evidence generated from pillar one. The participation of all key stakeholders and the dissemination of project outputs are expected here. Technical assistance will be given to national governments, the ASEAN secretariat, and the third sector. This assistance will be demand driven, evidence based, and will serve as platforms to foster dialogue for south-south exchanges and cooperation. A network of policy advisors will also be made as an advisory body and steering group for the project.

ii. Mechanics of Breakout Session for Workplan Development

Dr. Devesh Roy  
Research Fellow, IFPRI

The participants were divided as groups to represent their respective countries or the region and were given templates to guide their workplan.
iii. Working Group Discussion for Way Forward

The following are the initial outputs of each country and the regional level workplan for the ATMI Project.
<table>
<thead>
<tr>
<th>Component/Actions</th>
<th>People/Agency Responsible</th>
<th>Partners</th>
<th>Timeframe</th>
<th>Performance Monitoring, Indicators, Expected Concrete Outputs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I. Policy Studies: National strategies and policies promoting SSRP competitiveness and inclusion in regional agri-food markets</strong></td>
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<tr>
<td>1. National agricultural development policy for 5% annual Growth in Agriculture</td>
<td>Ministry of Agriculture; Department of Planning and Statistics</td>
<td>Before elections in July 2018—preferably by the end of 2017</td>
<td>Area/sub-sector wise actions to accelerate Ag. Growth</td>
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<td>Investment prioritization</td>
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<td>Guidelines for policy and institutional reforms</td>
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<td></td>
<td>IFPRI/SEARCA with MAFF as advisor</td>
<td>Before elections in July 2018—preferably by the end of 2017</td>
<td>How to promote small and medium enterprises in post-harvest processing of paddy and other main agricultural commodities</td>
<td></td>
</tr>
<tr>
<td>2. Agro-Industrial Development plan (AIDP)</td>
<td>MAFF, RUA</td>
<td>Before elections in July 2018—preferably by the end of 2017</td>
<td>Identify potential value chains for diversifying Cambodia’s agriculture</td>
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<td></td>
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<td></td>
<td>Identify strategies to leverage Cambodia’s natural gifts (best aromatic rice in the world)</td>
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<tr>
<td>3. Value-chains studies: to identify high impact value chains to be prioritized and then studied</td>
<td>RUA, Nuppun, CDRI</td>
<td>Before elections in July 2018—preferably by the end of 2017</td>
<td>Identify potential value chains for diversifying Cambodia’s agriculture</td>
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<tr>
<td>Candidates: Aromatic rice; pepper; maize, beans &amp; pulses; fruits &amp; vegetables</td>
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<td></td>
<td>Identify strategies to leverage Cambodia’s natural gifts (best aromatic rice in the world)</td>
<td></td>
</tr>
<tr>
<td>4. Promotion of modern technologies and practices in agriculture</td>
<td>RUA, GDA</td>
<td>Years 2-3*</td>
<td>Policy strategies to promote mechanization and adoption of best practices in agriculture</td>
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<td></td>
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<td></td>
<td>Inform national seed policy under preparation right now</td>
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<tr>
<td><strong>II. Policy Roundtables: Towards the development of national strategic plan of action to promote SSRPs in the context of ASEAN common market</strong></td>
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<tr>
<td>National agriculture development plans (NADP)</td>
<td>H.E. Dr. Ty Sokhun MAFF</td>
<td>Technical Working Group on Agriculture and Water; Think-tanks; Private companies; RUA</td>
<td>Preferably by end 2017. Latest before July elections in 2018</td>
<td>15-year plan for Agriculture sector (2030)</td>
</tr>
<tr>
<td>AIDP</td>
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<td>Inputs for AIDP and other related policies</td>
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<tr>
<td>Value-chains</td>
<td>Nuppun, CDRI Research Institutions</td>
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<td>National agricultural research policy</td>
<td>H.E. Dr. Ty Sokhun MAFF</td>
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<td><strong>III. Technical Assistance for Planning and Policy Development</strong></td>
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<tr>
<td>How to build human resources for agriculture sector: government officers, universities, research institutions</td>
<td>IFPRI, SEARCA (with support from MAFF; RUA)</td>
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<tr>
<td>Component/Actions</td>
<td>People / Agency Responsible</td>
<td>Partners</td>
<td>Timeframe</td>
<td>Performance/Monitoring Indicators/Expected Concrete Output</td>
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<tr>
<td>I. Policy Studies</td>
<td>NUOL</td>
<td>- NAFRI</td>
<td>2016-17</td>
<td>Reports; Number of people using; Policy Change</td>
</tr>
<tr>
<td>National strategies and policies promoting SSRP competitiveness and inclusion in regional agri-food markets (focus on Rice, Maize, Coffee, Cassava, Cattle, Vegetable, Tea and other potential crops…)</td>
<td>- NIPHR</td>
<td>- MAF</td>
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<tr>
<td>Actions / Tasks</td>
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<tr>
<td>1. Policy review (identify gaps in-term of agriculture transformation and market integration)</td>
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<tr>
<td>2. Strengthening extension network (farmers, extension workers, private sectors)</td>
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<td>3. SPS institutional development</td>
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<td>4. Study on constraint of vulnerable people to ensure nutrition outcomes</td>
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<td>5. Curriculum review (agriculture, marketing, agribusiness, nutrition…)</td>
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<td>II. Policy Roundtables</td>
<td>MAF</td>
<td>- NAFRI</td>
<td>2017-18</td>
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<td>Towards the development of national strategic plan of action to promote SSHPs in the context of ASEAN Common Market</td>
<td>NUOL</td>
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<td>- NGO's</td>
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<td>- CSOs</td>
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<td>- Government sectors</td>
<td>Line ministries…</td>
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<td><strong>Actions / Tasks</strong></td>
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<tr>
<td>1. National policy consultation (review) workshop on agriculture transformation and market</td>
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<td><strong>1.1 Brainstorming</strong></td>
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<td><strong>1.2 Division of stakeholder responsibility</strong></td>
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<td>2. Institutional reform workshop on management and implementation of agriculture transformation and market integration.</td>
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<td><strong>III. Technical Assistance for Planning and Policy Development</strong></td>
<td>MAF NUOL</td>
<td>- Government sectors (Line ministries…) - Private sectors - FOs - NGOs - CSOs</td>
<td>2017-19</td>
<td>- Report of workshop - Number of organizations agreeing to participate in the project implementation - Role and mandate of stakeholders - Number of people awarded. - Policies changed or improved of each stakeholder/sector</td>
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<td><strong>Actions / Tasks</strong></td>
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<tr>
<td>1. Strengthening the institutional capacity on policy analysis, institutional, Planning, M&amp;E, value chain development, SPS, WTO, legislation</td>
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<td>2. Annual policy research and development forum</td>
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<td><strong>Project Management</strong></td>
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<td><strong>Organize and manage National Project Steering Committee (NPSC)</strong></td>
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<td><strong>Actions / Tasks</strong></td>
<td>MAF</td>
<td>- NAFRI - MIC - MOH - NUOL - CSOs - NGOs - DPs - Private Sectors</td>
<td>2016</td>
<td>- Focal unit</td>
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<td>1. Identify Focal Unit/Person in the country</td>
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<td>2. Identify membership in the NPSC</td>
<td>MAF</td>
<td>- NUOL - NAFRI - MIC - MOH - NUOL - CSOs - NGOs - DPs - Private Sectors</td>
<td>2016</td>
<td>- member of NPSC</td>
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### Lao PDR

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<th>PERFORMANCE/MONITORING INDICATORS/EXPECTED CONCRETE OUTPUT</th>
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<tr>
<td>3. Inception workshop</td>
<td>MAF</td>
<td>- NUOL</td>
<td>2017</td>
<td>- Report of NPSC</td>
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<td>- NAFRI</td>
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<td>- Private Sectors</td>
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<td>4. Annual meeting of NPSC</td>
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<td>2017-20</td>
<td>- Report of NPSC</td>
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<td>5. Monitoring and Evaluation</td>
<td>MAF</td>
<td>- NAFRI</td>
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<td>- M&amp;E report</td>
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<td>NUOL</td>
<td>- MIC</td>
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<td>- Line ministries</td>
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</table>

**Name of Representatives:**
1. Mr. Khamtanh Thadavong-DOA-MAF
2. Dr. Silinthone Sacklokham-NUOL
3. Mr. Thongdam Phongphichitth-SAEDA
4. Dr. Suresh Babu-IFPRI
5. Ms. Bernice Anne C. Darwin-SEARCA

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### Myanmar

**Group 3: Myanmar**

<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
<th>PEDESTAL / AGENCY RESPONSIBLE</th>
<th>PARTNERS</th>
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<th>PERFORMANCE/MONITORING INDICATORS/EXPECTED CONCRETE OUTPUT</th>
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<tbody>
<tr>
<td>I. Policy Studies</td>
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<tr>
<td></td>
<td></td>
<td>National strategies and policies promoting SSRP competitiveness and inclusion in regional agri-food markets</td>
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</table>
**WORKPLAN at the NATIONAL LEVEL**  
**2016 - 2021**

**Country: Myanmar**

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<th>COMPONENT/ACTIONS</th>
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<tr>
<td><strong>Actions / Tasks</strong></td>
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</table>
| 1. Comprehensive study on beans/pulses sector, which is SSRP-competitive, export-oriented and potential market niche, including transformation, market integration, risk and opportunities identification for smallholders, and value chain development. (Comprehensive value chain study with full stack analysis) | CESD – Case studies, value chain studies  
YAU – SSRP surveys  
MoALI – Documentations on policies and regulations; and data | Regional governments, CSOs  
MoALI  
CESD | Y1, Y2, Y3 | Studies, reports, field trips, surveys, stakeholder forums, workshops and annual conference. |
| 2. Rubber: Looking at opportunities and challenges of market integration, learning components with fellow AMS – Cambodia, Laos and Vietnam (also Thailand). | CESD – Case study, value chain studies,  
MoALI – Documentation on regulations and data | Regional governments, industrial associations, CSOs | Y1 | |
| 3. Rice value chain: Evidence review of existing studies; complimenting existing knowledge with new studies on cross border trade (also applicable to CLV); Myanmar’s capacity to contribute buffer stock (ASEAN); linking studies on warehousing systems. | CESD – cross-border trade analysis and warehouse system diagnostics  
YAU – buffer stock estimation study | CSOs  
YAU – Farmers groups | Y1, Y2 | |
| 4. Fruits: Mango (GAP-oriented) and Watermelon (small holder-oriented); all-year-around fruit; | YAU – Mango study  
CESD - Water Melon study  
YAU – needs assessment  
YAU – application and training | YAU  
Private sector | Y2  
Y1, Y2 | |
| 5. Evidence Review: Synthesizing existing studies on transformation, market integration, and smallholders. | CESD - Analysis MoALI – Data and reports  
CESD – Technology Traceability of livestock sector | Private sector  
CESD | | |
| 6. Leapfrog Strategy: ICT application, market information dissemination and agriculture extension | | | | |
| 7. Foresight study: Sesame value chain | | | | |
| 8. Technology: Traceability of livestock sector | | | | |

**II. Policy Roundtables**  
Towards the development of national strategic plan of action to promote SSRPs in the context of ASEAN Common Market
<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
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<tbody>
<tr>
<td>Actions / Tasks</td>
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</tr>
<tr>
<td>1. National level roundtables (1 kick-off, 1 mid-term)</td>
<td>MoALI</td>
<td>CESD</td>
<td>Y1, Y3</td>
<td></td>
</tr>
<tr>
<td>2. Three Regional level stakeholder forums</td>
<td>CESD</td>
<td>State/region governments</td>
<td>Y1, Y2, Y3</td>
<td>Y1-Y5</td>
</tr>
<tr>
<td>3. Preparations of policy briefings on the above studies</td>
<td>YAU</td>
<td>CESD</td>
<td>Y1-Y5</td>
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<tr>
<td>4. Preparations of policy briefs on ASEAN instruments and policies</td>
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<tr>
<td>III. Technical Assistance for Planning and Policy Development</td>
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<tr>
<td>TA to AMS and national platform under the AMAF-CSO/FO Annual Forum to prepare National Strategic Plans of Action to promote SSRPs</td>
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<tr>
<td>Actions / Tasks</td>
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<tr>
<td>1. Warehouse receipt system, commodity exchange market system</td>
<td>IFPRI</td>
<td>CESD</td>
<td>Y1</td>
<td></td>
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<tr>
<td>2. GIS and database solutions – managing existing data to applicability</td>
<td>IFPRI</td>
<td>CESD</td>
<td>Y2</td>
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<tr>
<td>3. Value chain analysis with an emphasis on market integration and access diagnostics</td>
<td>SEARCA</td>
<td>YAU</td>
<td>Y1</td>
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<tr>
<td>4. Impact assessment of market integration</td>
<td>SEARCA</td>
<td>YAU</td>
<td>Y2</td>
<td></td>
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<tr>
<td>5. Market analysis capacity for extension service</td>
<td>IFPRI</td>
<td>CESD</td>
<td>Y3</td>
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<td>6. Nutrition-resilient food system study</td>
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<td>Project Management</td>
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<td>Organize and manage National Project Steering Committee (NPSC)</td>
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<td>Actions / Tasks</td>
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<tr>
<td>1. Identify Focal Unit/Person in the country</td>
<td>Dr. Zaw Oo, Centre for Economic and Social Development – focal person</td>
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<tr>
<td>2. Identify membership in the NPSC</td>
<td>Steerimg Committee (temp)</td>
<td>Dr. Theingi Myint, Yezin Agricultural University</td>
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<td>3. Secure permission from the MoALI</td>
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<td>4. Stakeholders dialogue/forum process management</td>
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<td>5. Identifying of supporting/complimentary</td>
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**WORKPLAN at the NATIONAL LEVEL**

**Country: Myanmar**

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<th>PARTNERS</th>
<th>TIMEFRAME</th>
<th>PERFORMANCE/MONITORING INDICATORS/EXPECTED CONCRETE OUTPUT</th>
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<tbody>
<tr>
<td>project partners</td>
<td>(YAU)</td>
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<td></td>
<td>- Dr. Khin Myat Nwe,</td>
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<td></td>
<td>- Livestock, MOALI</td>
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<td>- Mr. Yin Tun, Agriculture,</td>
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<td>- Ms. Ngu Wah Win, CESD</td>
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</table>

Name of Representatives: Dr. Zaw Oo, Dr. Theingi Myint, Dr. Khin Myat Nwe, Mr. Yin Tun and Ms. Ngu Wah Win

Resource Person: Dr. Kevin Chen (IFPRI)

**Group 4: Vietnam**

**WORKPLAN at the NATIONAL LEVEL**

**Country: VIETNAM**

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<tbody>
<tr>
<td>I. Policy Studies</td>
<td>Institute of policy and</td>
<td>IFPRI,</td>
<td>2017</td>
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<tr>
<td></td>
<td>Strategy for Agriculture</td>
<td>SEARCA,</td>
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<td>and Rural Development, MARD</td>
<td>IRRI</td>
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**Actions / Tasks**

1. Inclusiveness of value chain through “small farmers and big field” models in Vietnam: The case of rice commodity

2. Land consolidation in Vietnam as a tool to improve competitiveness of SSRP: obstacles and lessons

3. Needs assessment of capacity building of SSRP to better integrate into regional and international market

4. Strengthening linkages of SSRP to emerging Institute of policy and Strategy for Agriculture and Rural Development, MARD International Cooperation Department, MARD Planning Department, MARD IFPRI, SEARCA, IRRI 2017 - Report - Policy dialogue

- Report - Policy brief - Brochure - Assessment report

- Report - Pilot model - - Report
<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
<th>PEOPLE / AGENCY RESPONSIBLE</th>
<th>PARTNERS</th>
<th>TIMEFRAME</th>
<th>PERFORMANCE/MONITORING INDICATORS/EXPECTED CONCRETE OUTPUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>markets by IT support for traceability for fruit and vegetables (pilot testing model)</td>
<td></td>
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<tr>
<td>5. Enhancing the participation of SSRP in value chain: Comparative study of coffee and tea in Vietnam</td>
<td></td>
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<tr>
<td>7. Stimulating trade facilitation in ASEAN countries through market information system development and policy sharing: Pilot project</td>
<td></td>
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<tr>
<td>8. Ensuring food safety by better SPS management of border trade</td>
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<tr>
<td>9. Competitiveness analysis of selected agricultural commodities in Vietnam in the context of regional integration</td>
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</tbody>
</table>

II. Policy Roundtables
Towards the development of national strategic plan of action to promote SSRPs in the context of ASEAN Common Market

Actions / Tasks
1. Overcoming SPS and NTB
2. Competitiveness analysis of selected agricultural commodities in Vietnam in the context of regional integration
3. Food safety issues
4. Land consolidation
### Country: Vietnam

<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
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</thead>
<tbody>
<tr>
<td>programs in Vietnam as a tool to improve competitiveness of SSRP: obstacles and lessons</td>
<td></td>
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</tbody>
</table>

### III. Technical Assistance for Planning and Policy Development

**TA to AMS and national platform under the AMAF-CSO/FO Annual Forum to prepare National Strategic Plans of Action to promote SSRPs**

#### Actions / Tasks
1. Capacity building for researchers: market analysis, impact assessment of FTAs
2. Capacity for private sectors to develop value chain and market access

#### Project Management

**Organize and manage National Project Steering Committee (NPSC)**

#### Actions / Tasks
1. Identify Focal Unit/Person in the country
2. Identify membership in the NPSC

**IPSARD/ICD**

Name of Representatives: Dinh Pham Hien, Tran Cong Thang, Vu Quoc Khanh

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### Group 5: Philippines

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<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
<th>PEOPLE / AGENCY RESPONSIBLE</th>
<th>PARTNERS</th>
<th>TIMEFRAME</th>
<th>PERFORMANCE/MONITORING INDICATORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Policy Studies</td>
<td>Academe, Different Government Agencies (NEDA, DBM, DA, DILG, DOH, FDA, PIDS, DOST, DTI, FNRI etc.), Private Sector Groups</td>
<td>Academe, Different Government Agencies (NEDA, DBM, DA, DILG, DOH, FDA, PIDS, DOST, DTI, FNRI etc.), Private Sector Groups</td>
<td>First two years</td>
<td>□ Report and results of meta-analysis □ Baseline data □ Monitoring and evaluation framework</td>
</tr>
</tbody>
</table>

**Actions / Tasks**

1. **In-depth meta-analysis / scoping of existing value chain studies including implementation and other problems and issues to find gaps opportunities for different commodities**

   a. **Assessment of different industries involved in value chain, especially inter-relationships among different stakeholders; value addition; commercialisation and technology transfer in agriculture; challenges and opportunities focusing on small-scale rural producers**

   b. **Measures to address/manage risk in production and trade: i.e. crop insurance, access to credit, technical assistance**

   c. **Research on collective action as vehicle to enhance profitability, productivity, and sustainability in production and trade**

   d. **Nutrition driven and nutrition sensitive agriculture in relation to diversification of diet (i.e. affordable, accessible, nutritious, safe); role of nutrition education in promoting diversified diets**
## WORKPLAN at the NATIONAL LEVEL
2016 - 2021

**Country:** Philippines

<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
<th>PEOPLE / AGENCY RESPONSIBLE</th>
<th>PARTNERS</th>
<th>TIMEFRAME</th>
<th>PERFORMANCE/MONITORING INDICATORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Review of policy landscape and distortions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Review contracting arrangements for agriculture between smallholders and private companies as they affect production efficiency and equity</td>
<td></td>
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</tr>
<tr>
<td>b. Review of tenurial arrangements and property rights as they affect efficiency, income distribution, environmental sustainability, and people empowerment</td>
<td></td>
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</tr>
<tr>
<td>c. Efficient and effective delivery of support services to farmers: Review of different mechanisms for support to smallholders including budget allocation across agricultural programs (R&amp;D, role of institutions, infrastructure, market matching)</td>
<td></td>
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<td></td>
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<tr>
<td>d. Review of existing domestic laws affecting Philippine agriculture – logistics, distribution, storage, processing, standardisation, food certification (i.e. Cabotage Law, Quarantine Rules and Regulations, Competition Act, Standardisation, Food Safety Act, etc.)</td>
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</tbody>
</table>

**Outcome:** Suggestion of direction for policy reforms and possible scenarios

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**II. Policy Roundtables**

Towards the development of national strategic plan of action to promote SSRPs in the context of ASEAN Common
## WORKPLAN at the NATIONAL LEVEL
### Country: Philippines
#### COMPONENT/ACTIONS

<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
<th>PEOPLE / AGENCY RESPONSIBLE</th>
<th>PARTNERS</th>
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<th>PERFORMANCE/MONITORING INDICATORS</th>
</tr>
</thead>
</table>
| **Market**        | Academe, Different Government Agencies (NEDA, DBM, DA, DILG, DOH, FDA, PIDS, DOST, DTI, FNRI etc.), Private Sector Groups | Academe, Different Government Agencies (NEDA, DBM, DA, DILG, DOH, FDA, PIDS, DOST, DTI, FNRI etc.), Private Sector Groups | First two-three years | □ Report on policy roundtable  
Policy Reforms  
Information, Education, and Communication (IEC)  
Policy agenda setting of agencies  
Collaborative activities that emanate from the roundtable discussions |
| **III. Technical Assistance for Planning and Policy Development** | Academe, Different Government Agencies (NEDA, DBM, DA, DILG, DOH, FDA, PIDS, DOST, DTI, FNRI etc.), Private Sector Groups | Academe, Different Government Agencies (NEDA, DBM, DA, DILG, DOH, FDA, PIDS, DOST, DTI, FNRI etc.), Private Sector Groups | 4-5 Years | □ Implementable Action Plans for the stakeholders  
Implementing and monitoring evaluation mechanisms for the Action Plans |
| **Actions / Tasks** | Academe, Different Government Agencies (NEDA, DBM, DA, DILG, DOH, FDA, PIDS, DOST, DTI, FNRI etc.), Private Sector Groups | Academe, Different Government Agencies (NEDA, DBM, DA, DILG, DOH, FDA, PIDS, DOST, DTI, FNRI etc.), Private Sector Groups | First two-three years | Report on policy roundtable  
Policy Reforms  
Information, Education, and Communication (IEC)  
Policy agenda setting of agencies  
Collaborative activities that emanate from the roundtable discussions |
| **Actions / Tasks** | 1. Conduct policy roundtable discussions from results of meta-analysis, baseline data, and policy studies  
2. Policy Recommendations  
3. Dissemination of results to concerned stakeholders |  | First two-three years | |
| **Project Management** |  |  |  | |
| **Actions / Tasks** | 1. Targeted and informed capacity building for the Community/ NGOs, Farmer Groups, and LGUs (for delivery of support services for competitiveness, resilience, and sustainability)  
2. Implementing innovative and best practices for collective action of farmer groups, informal and formal  
3. Others based on the results of I and II |  |  | |
| **Actions / Tasks** | 1. Identify Focal Unit/Person in the country  
2. Identify membership in the NPSC  
3. Multi-stakeholder |  | 1-5 years | Meetings and reports |
# WORKPLAN at the NATIONAL LEVEL

**Country:** Philippines

<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
<th>PEOPLE / AGENCY RESPONSIBLE</th>
<th>PARTNERS</th>
<th>TIMEFRAME</th>
<th>PERFORMANCE/MONITORING INDICATORS</th>
</tr>
</thead>
<tbody>
<tr>
<td>identification</td>
<td>NGOs, POs)</td>
<td>etc.), Some of Private Sector Groups</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Early involvement of key stakeholders</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>5. Clear delineation of representatives to committee</td>
<td></td>
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</tbody>
</table>

**Name of Representatives:** Dr. Lita Pabuayon, Ms. Tisha de la Rosa, Dr. Devesh Roy (IPFRI), Dr. Ma. Cristeta Cuakresma, Mr. Geny Lapina, Mr. Cenon Elca, Ms. Trinidad Carlos, Dr. Majah-Leah Ravago

**Chair:** Dr. Lita Pabuayon

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# Group 6: Regional level

# WORKPLAN at the REGIONAL/ASEAN LEVEL

**2016 – 2021**

<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
<th>PEOPLE / AGENCY RESPONSIBLE</th>
<th>PARTNERS</th>
<th>TIMEFRAME</th>
<th>PERFORMANCE/MONITORING INDICATORS/EXPECTED CONCRETE OUTPUT</th>
</tr>
</thead>
</table>
| **I. Policy Analysis**  
A. Long-term implications of the ASEAN economies on food security and smallholder agriculture |                             |          |           |                                                            |
| Actions / Tasks  
1. Meta-analysis of Food Security Initiatives in ASEAN |                             |          |           |                                                            |
| 2. Trade Policy Modeling Analysis |                             |          |           |                                                            |
| 3. Decomposition of Agriculture Growth Analysis |                             |          |           |                                                            |
| 4. Analysis in Market Integration in Food Prices |                             |          |           |                                                            |
| 5. Determinants of Household Level Agriculture Commercialization |                             |          |           |                                                            |
| 6. Regional and Global Value Chains |                             |          |           |                                                            |
| 7. Building Resilience to Food Security in ASEAN |                             |          |           |                                                            |
| 8. Annual Reviews of ASEAN multi-country cooperation initiatives to promote SSRPs in relation to strategic regional agri-food value chains |                             |          |           |                                                            |
## WORKPLAN at the REGIONAL/ASEAN LEVEL
### 2016 – 2021

<table>
<thead>
<tr>
<th>COMPONENT/ACTIONS</th>
<th>PEOPLE / AGENCY RESPONSIBLE</th>
<th>PARTNERS</th>
<th>TIMEFRAME</th>
<th>PERFORMANCE/MONITORING INDICATORS/ EXPECTED CONCRETE OUTPUT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actions / Tasks</strong>&lt;br&gt;1. Partners meeting&lt;br&gt;2. Multi-sectoral project steering committee meeting (ASEAN secretariat, relevant ASEAN sectoral working groups, AFA, AsiaDRRRA)</td>
<td>Lead- IFPRI&lt;br&gt;Lead- IFPRI</td>
<td>IFPRI, IFAD, ASEAN secretariat&lt;br&gt;IFAD, IFPRI, SEARCA, private sector representative</td>
<td></td>
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<tr>
<td><strong>II. High-level Policy Forum</strong>&lt;br&gt;To develop shared vision on the inclusion of SSRPs in the ASEAN Common Market and the structural transformation of the agri-food system</td>
<td>IFPRI/ASEAN&lt;br&gt;AsiaDRRHA</td>
<td>SEARCA, AFA, AsiaDRRHA, etc.&lt;br&gt;IFAD, SEARCA, IFPRI&lt;br&gt;ReSAKSS Asia</td>
<td>2017&lt;br&gt;ANNUAL</td>
<td>Workshop, delivered&lt;br&gt;Presented in the workshop the Policy Analysis conducted under grant</td>
</tr>
<tr>
<td><strong>III. Technical Assistance for Planning and Policy Development</strong>&lt;br&gt;TA to the AMAF-CSO/FOs for the preparation of Roadmaps for the preparation of ASEAN Value Chain Roadmaps</td>
<td>IFPRI</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Actions / Tasks</strong>&lt;br&gt;1. Consult ASEAN secretariat first on priority commodities for value chain development</td>
<td>IFPRI</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Project Management</strong>&lt;br&gt;Organize and manage the Regional Project Steering Committee (RPSC)</td>
<td></td>
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</tr>
<tr>
<td><strong>Actions / Tasks</strong>&lt;br&gt;1. Identify membership in the RPSC</td>
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</tbody>
</table>
f. Session 6: Panel Discussion – Way Forward

**Dr Fabrizio Bresciani**, Chairperson for Session 6, informed the participants that after this inception workshop there will be discussions of issues at the regional level and bringing down of country issues to national level workshops. He marked guide posts for each panellist stating:

- **Dr Paul S. Teng** – what are your recommendations for the regional and national levels, thinking about engagement with the private sector, FO, CSO and the opportunity to start developing and trust in partnerships as it is important to bring key stakeholders together productively.
- **Dr. Ma. Cynthia S. Bantilan** – what are the key elements to consider when they do the analysis of agricultural transformation from the regional level down to the national level— in terms of the point of view of small-scale rural producers and what are the key elements of this viewpoint?
- **H.E. Dr Ty SoKhun** – what can this project deliver to policymakers in Cambodia and other countries?

**Dr. Paul S. Teng**, **Adjunct Senior Fellow, RSIS and Senior Fellow, SEARCA**

Dr. Paul S. Teng stressed that there is a lot we can do to harmonize and find the missing elements both at the ASEAN and country levels in terms of agricultural transformation and market integration. By cross-fertilization and synergy, we can **learn from each other**. We should understand the nature of partnerships and ensure that critical stakeholders and champions are included in the discussion. **Conditions for partnerships** should necessarily include complementing strengths, facilitating an environment of transparency, and communication. **Intervention points** including preparations to ensure that outcomes of the project contribute substantively to make a difference. Equally important are identifying who the change agents are and where their interventions will make the biggest difference in systemic changes – nationally, regionally, and at the ministerial level.
Dr. Ma. Cynthia S. Bantilan, Former Research Program Director, ICRISAT

Dr. Ma. Cynthia S. Bantilan reiterates the basic unifying concepts of (1) inclusiveness; (2) the role of smallholders and small-scale rural producers; and (3) addressing food security and the questions of data reliability and consistency; (4) ensuring agricultural transformation and market integration in implementation strategy, and finding entry points that are science-based; (5) involving inclusive agribusiness from both the public and private sectors while ensuring that the social processes respect the space of each stakeholder; (6) effective monitoring, impact assessment both now and at post-project, at the country and regional levels, (7) the need for capacity building both at the policy level and grassroots levels; (8) Provision of basic needs as incentive to participation; and lastly (9) prioritization by essential constraints and mutually agreed solutions addressing these.
H.E. Dr. Ty SoKhun expressed his sincere appreciation to SEARCA, IFPRI, and IFAD in conducting this workshop that aims to respond to food security and inclusivity concerns. He stated that the workshop was an informative and useful platform for sharing, learning, understanding and working together among ASEAN countries and stakeholders. A lot was learned from the workshop, and much was inspired, including changing the way of thinking about food security and smallholder agriculture. The focus from food production to whole value chains and even the whole food system, moving from one crop to another, sector to multisector roles, multi-stakeholder, and more holistic, participatory and smart approaches were other learnings.

There are differences among AMS but we share many more commonalities such as the goal to free ourselves from poverty, hunger, and malnutrition. The common challenge of producing more food with less inputs – including less water, carbon emissions; and the effort to combat climate change are other similarities. H.E. Ty SoKhun declares that concerted efforts and partnerships among all stakeholders can help us achieve SDGs by 2030. He reiterates the need for mutual trust in partnerships and to establish trust requires transparency, accountability, and more effective governance processes and participation. The public sector should be more efficient, open, transparent, accountable, predictable, and systematic in decision making. The private sector must think more about social and environmental responsibility aside from profits. For farmers, His Excellency mentioned that they are mostly poor, and the way farmers might become a productive partner in inclusive growth and sustainable development is through empowerment. This can be
achieved through securing land tenure, innovative capacity from production, processing to market, legal mechanisms, and agricultural cooperatives, among others. Support must be comprehensive and dynamic. There must be a smart policy of food and nutrition security based on integrative participation and territorial approach. Lastly, H.E. Sokhun concludes by expressing his appreciation to SEARCA, IPFRI, and IFAD for including Cambodia in this wonderful project – he looks forward to working with the partners for incoming 5-year project implementation period.

III. Closing Program

a. Closing Remarks

Dr. Fabrizio Bresciani
Regional Economist, IFAD-Asia and the Pacific Region

Expressions of sincere gratitude and thanks were given by Dr. Bresciani to the organizers, highly complementing SEARCA for a fantastic job. Participation was excellent considering time was not abundant. He also expressed his confidence that the project is in the hands of valuable partners and he looks forward to a fruitful future.

Dr. Gil C. Saguiguit, Jr.
Director, SEARCA

On behalf of Dr. Gil C. Saguiguit, Dr. Bessie M. Burgos expressed her compliments to IFAD and IFPRI for the three-month effort of convening this group of highly distinguished representation from AMS and other institutions who came from all over the world. Special thanks are given to Senior Fellow Dr. Paul S. Teng for his invaluable guidance and contribution to this project. Knowledge Management is a key input into this program and therefore SEARCA has plans to involve scholars in ways where they can productively participate in research studies of the project.

The necessary next steps are the gathering of counterparts to review the output of the workshop; generating the workshop proceedings; preparing for the national-level inception workshops and validation of national action plans; creation of the regional steering committee and national project steering committees; identifying focal points; and lastly making representations to the ASEAN Secretariat by IFPRI, SEARCA and IFAD and to the AMS governments by the national project teams to generate support and commitment for the ATMI project.

b. Vote of Thanks
Dr. Pramod Kumar Joshi  
Director-South Asia, IFPRI

On behalf of SEARCA, IFPRI, and IFAD, Dr. Pramod K. Joshi expressed his thanks to all the participants and delegates from different countries bringing with them their own perspectives. Special thanks went to Dr. Bresciani for a clear vision of the project, Dr. Gil C. Saguiguit for hosting the workshop, Dr. Bessie Burgos and her team for their tireless work, and the farmer organizations and private sector for their participation. Dr. Joshi voiced his gratitude for highlighting the poor and smallholders in the two-day workshop and bringing them into the mainstream of agricultural value chain in hopes of winning the war against poverty, malnutrition, and hunger. Dr. Joshi declared his hope that the future of the project brings a consolidation and unity of activities, partnerships, synergies, and cross-fertilization that involves policymakers and output that makes an impact.

After the Vote of Thanks, SEARCA gave tokens of appreciation to IFPRI and IFAD representatives as well as the resource speakers.
IV. Workshop Evaluation

The Workshop was evaluated across five criteria, namely, program, speakers, logistics, expectations, and overall satisfaction. A total of twenty-six participants responded to the workshop evaluation forms. Participants rated each criterion from 1 to 5 with 5 being the highest. Aside from being asked to elaborate on their ratings, the participants were also requested to accomplish a separate one-page feedback form for additional comments and suggestions.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Rating</th>
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<tbody>
<tr>
<td>1. PROGRAM</td>
<td></td>
</tr>
<tr>
<td>1.1 Program was well-organized</td>
<td>4.82</td>
</tr>
<tr>
<td>1.2 Topics were consistent with stated objectives</td>
<td>4.63</td>
</tr>
<tr>
<td>1.3 Information presented were appropriate and helpful</td>
<td>4.61</td>
</tr>
<tr>
<td>1.4 Workshop sessions contributed to objectives</td>
<td>4.64</td>
</tr>
<tr>
<td>1.5 Stated next steps are appropriate and realistic</td>
<td>4.39</td>
</tr>
<tr>
<td>2. SPEAKERS (overall)</td>
<td></td>
</tr>
<tr>
<td>2.1 Well prepared and organized</td>
<td>4.61</td>
</tr>
<tr>
<td>2.2 Stimulated interest in the subject matter</td>
<td>4.54</td>
</tr>
<tr>
<td>2.3 Clarified content in response to questions</td>
<td>4.43</td>
</tr>
<tr>
<td>2.4 Treated participants with respect</td>
<td>4.82</td>
</tr>
<tr>
<td>3. LOGISTICS</td>
<td></td>
</tr>
<tr>
<td>3.1 The room arrangement/layout was appropriate</td>
<td>4.39</td>
</tr>
<tr>
<td>3.2 Food and refreshments were sufficient and good</td>
<td>4.50</td>
</tr>
<tr>
<td>3.3 Rooms were clean and comfortable</td>
<td>4.38</td>
</tr>
<tr>
<td>3.4 Registration process was efficiently handled</td>
<td>4.75</td>
</tr>
<tr>
<td>3.5 Overall, activity was well organized</td>
<td>4.68</td>
</tr>
<tr>
<td>4. EXPECTATIONS</td>
<td></td>
</tr>
<tr>
<td>My expectations from the launch workshop were met</td>
<td>4.64</td>
</tr>
<tr>
<td>5. OVERALL SATISFACTION</td>
<td>4.68</td>
</tr>
</tbody>
</table>

Across all criterion, the launch workshop was evaluated by the participants as achieving the highest possible ratings with average overall satisfaction at 4.68 out of 5 (Table 1). The participants strongly agreed that the workshop met their expectations; logistics was handled expertly; speakers were well prepared, interesting, and were collegiate in discourse; and that the program was well-organized, consistent with stated objectives, appropriate, and realistic. Of 16 sentences evaluated across the five criteria, 12 garnered rankings higher than 4.5, midway to strongly agree, with the remaining 4 garnering ranking closer to 4 (agree).
The following are recommendations and suggestions provided by the participants as a response to following questions:

1. Would you like to participate in this kind of workshop in the future? Yes (26 out of 26 respondents)

2. What should be the main objective of the next workshop on Agricultural Transformation and Market Integration in ASEAN?
   - Learning from the initial gains/contributions of ATMI
   - Discussion on implementation of proposed projects
   - Implementation strategy in detail
   - Sharing by farmers
   - Sharing lessons on project implementation
   - Monitor progress, assess value added through policy analysis and policy dialogue, determine work program for the following years
   - Livestock sector should be included in this kind of workshop in the future
   - Detailed workplan and feasibility studies
   - In order to integrate the market, the least developed countries need a lot of helping hands and also how the country can benefit or lose
   - Present the preliminary findings for policy research
   - Institutional and policy transformation on agriculture and food security
   - There seems to be some common country studies (having the same themes/research question or value chain analysis); it will be good to have a regional sharing of these common country researches
   - Deepen the understanding of ATMI
   - Linking the domestic/national imperatives with regional frameworks and global regimes
   - Project planning for implementation
   - Value chain for agricultural products and the participation of PPP in the value chain
   - Regional value chain analysis, cross-country analysis of key crops: comparative advantage and diversification or specialization
   - Multi-stakeholder partnership, smart and systematic approaches
   - Policy and strategy development analysis

3. Any suggestions for improvement?
   - Identification of entry points for collaboration for participating institutions/groups at the end of the workshop
   - On hindsight, timing the workshop so as to ensure highest participation as possible by policy makers
   - Myanmar needs a lot of experiences and knowledge from all of you especially on value chain of livestock sector
   - Some evidence-based research should be presented for lessons learned
The workshop should include a field study/field trip
More time to discuss topics, point of view of an actual agriculture practitioner should be taken into consideration/covered (not just by an NGO)
There could be a greater scope for Q&A

4. What other activities would you recommend, if any, in support of Agricultural Transformation and Market Integration in ASEAN? Please elaborate.
   - Clear mechanism on following up and later progress monitoring of plans and areas for action
   - Policy process documentation of ASEAN implementation and achievement of impacts on policy change
   - Feed some of future analytical work into AJAD; prepare presentation to be showcased at ASEAN and national levels
   - Visit field activities
   - I would like SEARCA and IFPRI to support this concept through national level workshop
   - Greater participation of government officials and the ASEAN Secretariat for a more cohesive two-way interaction
   - Perhaps a key stakeholders’ consultative workshop. The stakeholders would be government, private sector, CSOs, FOs who could give their perspectives and concerns regarding ATMI in ASEAN
   - More workshops not only for economic managers but private sector as well
   - Workshop can be accompanied by technical visit to farmers’ group to provide exposure to participants and learning on the ground
   - I would suggest a brainstorming with policy makers
   - Implement studies at the country-specific level by focusing on value chain of key agriculture commodities, with consideration of regional value chain as well; identify measures to increase value addition/retail value in the country of mango, cassava, paddy rice, etc.
   - It may be useful to have some inputs from social scientists on how ATMI impacts communities
IFPRI officials gather for a photo after a light discussion during a break.
RESOURCE PERSONS

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