

Regional Policy Forum on Asian Livestock Challenges, Opportunities and the Response

16-17 August 2012

Summary Report¹



Background

Growing populations, rising disposable incomes and progressive urbanization in Asia and the Pacific region have spurred rapid growth in the consumption of animal source foods. The region has generated more than half the gains in global livestock production since the early 1990s and this growth is expected to continue in the foreseeable future. However, the manner of supply growth has also imposed considerable social, health and ecological costs. Signs of resource stress are now becoming visible and are raising new challenges for food and nutrition security of the poor. There are also growing concerns of real and potential marginalization of small producers in the process, resulting in missed opportunities for supporting rural livelihoods.

Climate change, water scarcity, land degradation and increased resource competition for food, feed and fuel production pose major additional challenges for the sector in the long run. The environmental and natural resource implications of livestock production have come under intense public scrutiny in recent years and the debate on climate change has been particularly passionate. Similarly, in view of the widespread prevalence of a number of production limiting and trade preventing diseases in the region and growing health concerns resulting from zoonotic and food-borne diseases, support for the development of policies and response systems for enhancing food safety and minimizing disease burden is another area that is receiving growing attention.

Asia is a very heterogeneous region with widely varying income levels, prospects for future economic growth, production and marketing systems, and technical and institutional capacities. This diversity is also reflected in the consumption and production trends of livestock products, the trading patterns, and the aspirations of countries in meeting multiple needs from the sector. Finding the right balance amongst these multiple needs requires better policies, institutions and regulations. There is no size that fits all and hence regulators and policy makers need to weigh the entire range of economic, environmental, social and health issues associated with livestock production and manage the conflicts and trade-offs.

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To discuss and debate these issues, promote collaboration and knowledge exchange among relevant national and international agencies and to discover the ways of addressing future challenges, FAO, together with ILRI, IFPRI and other partners, organized the Regional Livestock Policy Forum in Bangkok on 16-17 August 2012. The forum was attended by about 70 participants from over 11 countries comprising stakeholders from governments, national and international research agencies, civil society organizations, multilateral institutions, think tanks, private sector and regional and global networks (see Annexes 2 and 3 for detailed and a list of participants). The forum provided a platform to share experiences, debate issues of key concern, and provide guidance for the nature of required policy response in different countries and growth scenarios.

Keynote addresses

Three keynote addresses briefly reviewed the sector trends and highlighted social, health and environmental aspects of the rapid livestock sector growth and policy induced structural changes in Asia. Using the case of poultry industry, the first keynote address by Nipon Poapongsakorn, President, Thailand Development Research Institute, argued that the profit efficiency advantage of smallholders can substantially increase if smallholder farmers can move from traditional backyard to more commercial operations. This process must however be supported by public or private organizational structures that can link them to remunerative markets. Based on the evidence from Thailand, it was argued that despite substantial scaling up in poultry industry, smallholders have not been unfairly treated in Thailand; and although numbers of smallholders in poultry and swine industries have declined substantially, those who remained in the business have managed to successfully improve their competitive position. This was made possible by policy support from the government in technology adoption and ensuring markets remained sufficiently competitive to avoid malpractices.

The second keynote address by Jimmy Smith, Director General, International Livestock Research Institute, noted that a large number of poor depend on livestock and despite the scaling up and industrialization trends, smallholders persist all over the world, but particularly in Asia. This is true even in those countries and those sub-sectors where there has been rapid industrialization and scaling up. Smallholders therefore remain central to the livestock sector policy. He then focused attention on health issues at the livestock-policy interface and highlighted the linkages between livestock, human health and nutrition, animal health and ecosystem health. A point was made that health is not simply the absence of disease but involves constant nurturing of approaches and environments to support healthy humans, animals and ecosystems. The greatest burden of unhealthy environments in the form of animal and human diseases falls on poor livestock keepers and their communities and hence it is essential to support them to reduce the health risks from agriculture as well as to improve the productivity of their enterprises. It is also essential to manage diseases at source instead of at the victim, to promote risk based and incentive based food safety systems, and build better surveillance for animal, human and ecosystem health.

The third keynote by Henning Steinfeld, Chief, Livestock Information and Policy Branch of FAO, focused on natural resource and environmental implications of uncontrolled rapid growth of the sector in the region. He argued that the livestock sector is particularly resource hungry and makes substantial demands on the global natural resource base and the biophysical environment. The implications of these demands often go beyond the livestock sector when seen in the context of growing scarcities and the resource competition with other uses and sectors. This requires measures to increase the efficiency of natural resource use in the livestock sector and policy and regulatory measures that can (i) internalize the external costs imposed by livestock production systems, (ii) encourage recovery of nutrients from livestock waste, and (iii) restore grasslands and pastures for livelihood support and sustainable livestock sector development. For making more concrete progress on these issues, however, there is a need to distinguish between different growth scenarios due to the diversity of production and market conditions across the region. Henning Steinfeld outlined three scenarios in this context -- 'no growth', 'growth' and 'post growth' -- and the potential policy instruments for these different scenarios. More important, however, he argued that the environmental policy in all these scenarios must be seen in specific social and political contexts. Given the integrated nature of social, environmental and health issues, and given the limited space for stand-alone livestock policies or for stand-alone environmental policies, the real challenge is to integrate the livestock sector into mainstream, economic, social, health and education policies.

Full videos of the three keynote presentations are available online at the links indicated in the Annex 1.

Technical presentations

A number of presentations covered ongoing changes in the Asian livestock sector, new challenges, good practices, and initiatives from national and local perspectives. The presentations highlighted the importance of livestock for food and nutrition security both at national and at household levels. Dairy products in India and pork in China, for example, are essential items in peoples' diets and hence these sub-sectoral policies remain critically important for the governments in these countries. Any rapid rises in the price of milk in India and that of pork in China usually make headline news and can have political ramifications. In that context, the presentations by PK Joshi and Kevin Chen reviewed the policy context of these sub-sectors and outlined the future investment and policy scenarios including the need for government commitment and leadership for shaping the future dairy and pork agendas in India and China.

Growing scarcity of feed and fodder is often identified as one of the most serious challenges for the region for meeting the growing demands and for mitigating the adverse environmental impacts. In that context, Harinder Makkar reviewed feed and fodder trends for the Asia region and presented a number of options to enhance availability of feeds and fodder, tap new feed resources and enhance nutrient availability from the intestinal track of animals.

Take it back 'to the community' and 'to the small entrepreneur' was the key message of a series of presentations that followed. These presentations

highlighted elements of good practices that, though sometime specific to special contexts, had important lessons for policy makers across the region. The presentations reiterated the importance of smallholder producers and small entrepreneurs across the value chain in poverty reduction, employment generation, building social capital and nurturing a more inclusive and sustainable livestock sector in the region. While acknowledging the importance of scale economies and high standards of food safety in the context of changing regional and global market environment, the presentations argued for a central place for local communities and smaller players in national and international policies. Another important message was that services for which end users pay or contribute are more sustainable in the long run.

Full videos of all the technical presentations are available online at the links indicated in the Annex 1.

Panel discussions

Three thematic panel discussions were organized to further elaborate on selected key issues. A brief summary of the discussions on the thematic areas and the broad messages that emerged from the deliberations are given below.

Theme 1: Improving market participation and livelihood resilience of smallholder livestock producers

There was strong consensus that despite the ongoing structural changes and scaling up of livestock production in many parts of the region, smallholder producers continue to be an important and critical part of livestock production systems and market chains, and investing in these systems to raise their productivity and bargaining power must remain an essential component of the policies and strategies for dealing with poverty and malnutrition. The consensus provides an opportunity for a new momentum and evidence base to create a voice and a platform that can argue, more strongly, the need for targeted investment for supporting and enabling smallholders.

For designing smarter policies, however, there is a need to better understand the “risks and incentives” faced by smallholder producers and other value chain agents. At a fundamental level, policy mechanisms should aim at mitigating the downside risk so to increase their capacity to specialize and raise the returns to their enterprises. Similarly, policy research needs to focus better on identifying the specific market failures throughout the value chain and the mechanisms to address those market failures so as to facilitate better uptake of technologies by smallholders to enable them to move into more commercial production systems and market chains. Due care must be taken in this context, however, to ensure that the diversity of local markets and peoples’ choices in maintaining diversified livelihoods are not compromised.

Going beyond economic and social policies, there is also a need to better recognize the new kinds of organizational structures and forms for linking smallholders to markets. The classic models of collective action such as cooperatives and producer groups remain important and there is a continuing need for public support for these models in terms of finance, credit, capacity building and mechanisms to reduce risks, but, at the same time, there are new

sets of private sector initiatives and organizational models that are not fully integrated into the discussions on smallholder market participation. A closer understanding of these initiatives and models can help discover new opportunities for involving smallholders through innovative public-private partnerships and for refocusing pure public support measures to areas which may not yet be sufficiently attractive for private investors.

Finally, targeted public support will need to be guided by a more nuanced and differentiated articulation of the target group and of the support strategies. The definition of the smallholder target group and the nature of public support measures such as livelihood protection vis-à-vis commercialization will vary from one context to another and a clearer common understanding of such objectives would be necessary for better design of policy and support measures across diverse contexts.

Theme 2: Environmental Considerations for Asian Livestock

The deliberations related to livestock-environment issues were particularly passionate and reflected diversity of views, knowledge gaps, uncertainties, and stakeholder vision about future development. These also reflected an emerging sense of urgency in the region to deal with pollution, climate change, biodiversity losses and resource use efficiency issues. It was recognized that livestock production is one of the many factors responsible for these problems and these multiple effects make it difficult to measure true impacts and to devise appropriate policy instruments. It was clear from the discussions that environmental policy needs to take into account the social context so that policy does not take measures against specific target groups simply because they may have higher pollution or emission intensity per unit of output. There was consensus on the need for more detailed information on the extent of environmental impacts differentiated by production systems (including scale and size), commodities and commodity chains, and geographical regions.

The need for similar differentiation was also reflected in the discussions related to policy responses. In the marginal areas where there may be very low returns to intensification and where land degradation problems are severely affecting ecological sustainability, instruments such as payment for environmental services may potentially offer a way forward for restoring the production base while protecting livelihoods and stimulating income generation. In areas where market led intensification is rapidly proceeding, economic policy needs to factor in external costs and channel those costs to the consumer through prices. And in areas where unregulated sector growth has resulted in severe pollution and nutrient overloads, the policy response would need to take the form of stronger regulation for environmental and public health protection. But incentive based systems of managing resources need to be complemented with policies and legislations that can strengthen the governance of natural resources by enforcing a shared collective responsibility of resource management. This is particularly true in the context of common property resources where national policies and international conventions must aim at putting 'people' and 'local communities' at the centre of managing and sustaining these resources. In the context of the theme of this panel, the panellists and participants further emphasized a greater sense of urgency for the region to move beyond dialogue to action by setting clearer priorities,

targets and performance indicators; and this must be done by taking a comprehensive view of production systems and associated value chains in assessing social and environmental performance instead of focusing on specific production systems and parts of the value chain.

Finally, there is a need to examine these issues from the consumption side. In many parts of the region, the consumption of animal source foods is already beginning to exceed levels that may be characterized as 'healthy'; and policies that encourage production response to meet burgeoning demand for livestock products without due regard to negative impacts of high consumption levels on nutritional wellbeing of people would further exacerbate the environmental and social costs associated with livestock sector growth.

Theme 3: Spotlight on health risks at the animal-human-ecosystem interface

An important implication of rapid uncontrolled livestock sector growth in the region is that it has increased risks to animal and human health stemming from larger interfaces between people, livestock and wildlife; increased movement of livestock and livestock products; and, fostered high densities of genetically homogeneous livestock and rapid turnover. All favour the development of rapidly replicating, highly contagious disease agents. Further, in most countries, intensifying livestock production is accompanied by an increased use of anti-microbial substances, which are losing their effectiveness as resistance genes are selected for and transferred between microorganisms. These risks are compounded by the co-existence and interaction between traditional and industrial production systems and the abundance of wet and live animal markets in the region. Reducing (i) the burden of food-borne diseases and infectious parasitic diseases, (ii) the risk of novel and emerging diseases, and (iii) the abuse of antimicrobials should therefore be at the core of policies aimed at dealing with health risks at the animal-human-ecosystem interface. This requires a more holistic approach towards health and closer multi-sectoral and interdisciplinary collaboration. Bringing about such collaboration remains a major challenge in the region.

The second element of dealing with health risks would be to shift focus from treating the symptoms and reacting to emergencies to addressing the root causes of disease emergence and spread. In this context it was pointed out that overuse of antimicrobials in industrial systems is probably one of the causes of disease emergence and that governments must strive towards instituting policies and legislations that promote more prudent use of antimicrobials in farm animals. Such policies should further be complemented with smart surveillance systems including incentivised disease reporting.

Given the public good nature of disease control and limited capacity in the region, there would need to be stronger public sector investment in these systems, though private sector must also share its responsibility both in investment and system design. This necessitates stronger public-private partnerships in moving the 'one health approach' from concept to action. Costs of inaction both in terms of direct economic costs and lost opportunities would be immense.

Valedictory session

The valedictory session sought to synthesize the key messages from presentations and panel discussions and collect ideas on possible future steps towards sector policy support. It was re-emphasized that in light of the production and consumption trends and growing role of livestock in agricultural GDP in many countries, there is a need to correct the sectoral imbalances in resource allocation and to raise the profile of livestock sector in national and international policy forums. This requires more rigorous sector analysis, knowledge dissemination, policy formulation and implementation, and policy advocacy specially towards reorienting research to meet the needs of smallholder livestock producers, instituting more systematic instruments for improvement and conservation of animal genetic resources, identifying new sources of feed and fodder for a range of agro-ecosystems, and designing and implementing mechanisms and products to mitigate against production and market related risks. Future agenda in the livestock policy interface must therefore focus on creating awareness and sensitivity about such issues at the highest levels of policy making at national, regional and international levels.

Nurturing such a process of creating the community and facilitation of dialogue would require a coalition of national and regional organizations who are willing to make long-term commitment to this vision. There is perhaps no alternative to creating such a coalition and giving it time to evolve and establish credibility among stakeholders. It was pointed out that the organizing partners of the forum in general, and FAO, APHCA and ILRI in particular, bring unique and complementary strengths to this debate and are best positioned to creating such a coalition and providing a neutral platform for facilitating regional cooperation, knowledge exchange, policy dialogue and catalytic action in pursuit of shared goals. In this context, it is important to understand however that the intellectual change usually has a long gestation period and organizations and individuals representing the next generation must become an active partner in this coalition.

Annex 1: Video links for keynote addresses and technical presentations

Name and Designation	Presentation Title
Dr. Nipon Poapongsakorn President Thailand Development Research Institute Bangkok, Thailand	Keynote address Livestock Industrialization in Asia : Growth, Scaling-up, Competitiveness and Outlook for Smallholders
Dr. Jimmy Smith Director General International Livestock Research Institute	Keynote address Health at the livestock-policy interface
Dr. Henning Steinfeld Chief, Livestock Information and Policy	Keynote address Livestock and Natural Resources
Dr. PK Joshi Director (South Asia) International Food Policy Research Institute	 Structural Changes in Indian Dairy Sector
Dr. Kevin Z. Chen Senior Research Fellow & China Program Leader International Food Policy Research Institute	 Hog Farming in Transition: the Case of China
Dr. Harinder Makkar Senior Animal Production Officer Animal Production and Health Division, FAO of the United Nations, Rome, Italy	 Feed and Fodder Challenges for Asia and the Pacific
Tinni Sawhney Programme Director South Asia Pro Poor Livestock Policy Programme NDDDB House, Safdarjung Enclave, New Delhi	 Community-led Good Practices on Small-holder Livestock Rearing
Md. Ehsanul Bari Managing Director Grameen Motsho O Pashusampad Foundation (Grameen Fisheries & Livestock Foundation) Dhaka, Bangladesh	 Community Livestock and Dairy Development Project
Jagdeesh Rao Executive Director Foundation for Ecological Security, India	 Commoning the Commons - Rehabilitating Community lands in India
Girish Sohani, President Bharatiya Agroindustries Development Research Foundation	 Experiences on Small Ruminants with Reference to imGoats
Dr. Khieu Borin Advisor Centre for Livestock and Agriculture Development Phnom Penh, Cambodia	 Passing the gift: Building Social Capital
ANILO "DANNY" V. FAUSTO National Chairman Dairy Confederation of the Philippines Founder, Talavera Dairy Cooperative, Inc. President, DVF Dairy Farm, Inc.	 DVF Dairy Farms
Amphon Waritthitham Animal Husbandry Officer Animal Nutrition Research and Development Center Lampang, Thailand	 Extension of grass production for dairy farms
Patrice Gautier <i>Director General – Dr Vet</i> Asian Veterinary & Livestock Services Hanoi, Vietnam	 Experience in setting up of a small/medium for safe animal derived products in Vietnam

Panel Presentations²

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and

Poverty, food security, livestock and the
smallholder

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Henning Steinfeld
Chief, Livestock Information and Policy
FAO, Rome, Italy

Environmental Considerations
for Asian Livestock

Joachim Otte
Senior Animal Production and Health Officer
Senior Animal Production and Health Officer
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and

Human Health Risks at the Animal-Human
Interface

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² Videos under preparation

Annex 2: Program

August 16, 2012

08.30—9.00hrs Registration

9.00—10.30hrs

- Opening address by Mr. Man Ho So, Deputy Regional Representative for Asia and the Pacific, FAO Regional Office, Bangkok
- Welcome by Dr. Ayuth Harintharanon, Deputy Director General, Department of Livestock Development, Royal Thai Government
- Introduction to the forum – Vinod Ahuja
- Keynote addresses
 - Nipon Poapongsakorn, President, Thailand Development Research Institute (TDRI)
 - Jimmy Smith, Director General, International Livestock Research Institute, Nairobi, Kenya
 - Henning Steinfeld, Chief, Livestock Information and Policy Branch, FAO, Rome, Italy

10.30—11.00hrs Group photo followed by Tea/coffee

11.30—13.00hrs Chairperson: Wimolporn Thitisak, Deputy Director General, Department of Livestock Development, Royal Thai Government

- Structural changes in Indian Dairying -- P K Joshi, Director (South Asia), International Food Policy Research Institute (IFPRI)
- Hog farming in transition: the case of China –Kevin Chen, Senior Fellow and Program Director for China, International Food Policy Research Institute (IFPRI)
- Feed and Fodder Challenges for Asia and the Pacific – Harinder Makkar, Senior Livestock Production Officer, FAO Rome
- Discussant remarks—
 - Zhang Lubiao, Director General, Chinese Academy of Agricultural Sciences
 - KML Pathak, Deputy Director General, Indian Council of Agricultural Research
 - Kheiu Borin, Centre for Livestock and Agriculture Development, Phnom Penh, Cambodia

13.00—14.00hrs Lunch

14.00—15.30hrs Chairperson: Purvi Mehta, Director (Asia), International Livestock Research Institute

Good Practices and Experiences from South Asia

Tinni Sawnhey	South Asia Pro Poor Livestock Policy Programme
Ehsanul Bari	Community Livestock and Dairy Development Programme in Bangladesh
Jagdeesh Rao	Rehabilitation of degraded pasture and community land in India
Girish Sohani	imGoats

15.30—16.00hrs Tea/Coffee

16.30—18.00hrs Chairperson: Vinod Ahuja

Good Practices and Experiences from East and Southeast Asia

Kheiu Borin	Passing the gift, Building Social Capital—Case of Cambodia
Danilo Fausto	DVF Dairy Farm, Talavera Ecija, Philippines
Amphon	The Business of Fodder—An experiment in Northern Thailand
Patrice Gautier	Small/medium value chains for safe animal products in Vietnam: methods, results and perspectives for duplication

19.30 hrs Welcome dinner hosted by Mr. Hiroyuki Konuma, Assistant Director-General and Regional Representative, Food and Agriculture Organization of the United Nations

August 17, 2012

09.00–09.15 Special address by Dr. Yukol Limlamthong, Advisor to the Minister of Agriculture and Cooperatives, Government of Thailand

09.45—16.00 *Thematic discussions*

09.45—11.15hrs Theme 1: Policy options for improving market participation and livelihood resilience of smallholder livestock producers

Chairpersons: Sanjay Bhoosreddy and Thomas Randolph

Theme leaders: Steve Staal and Vinod Ahuja

Panelists: Tuan Nguyen, In-Shik Nam, Sumiter Broca, Pete Ocampo

11.15—11.30hrs Tea/Coffee

11.30—13.00hrs Theme 2: Environmental Considerations for Asian Livestock

Chairpersons: Dr. Rafiq-ul-Hassan Usmani and Henning Steinfeld

Theme leaders: Henning Steinfeld and Pierre Gerber

Panelists: Sagari Ramdas, Arayan Trangan, Hu Song, Tashi Dorjee

13.00—14.00hrs Lunch

14.00—15.30hrs Theme 3: Spotlight on health risks in animal-human-ecosystem interface

Chairpersons: Jimmy Smith and Subhash Morzaria

Theme leaders: Joachim Otte and Delia Grace

Panelists: Boonpeng Santiwathathanatham, Manish Kakkar, Boripat Siriaroonrat, Mo Salman

15.30–16.00hrs Tea/Coffee

16.00—17.00hrs Pulling together and next steps. – valedictory panel chaired by Dr. Raj Paroda, Executive Secretary, Asia Pacific Association of Agricultural Research Institutions and comprising the three theme leaders

17.00hrs Closing and vote of thanks

Annex 3: List of Participants

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