



COMPLETION REPORT



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

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Submitted by

International Food Policy Research Institute

Prepared by

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Abbreviations

| | |
|-------------|--|
| ACEDAC | ASEAN Centre for the Development of Agricultural Cooperative |
| ACPOR | Annual Country Programme Review |
| AEC | ASEAN Economic Community |
| AFA | Asian Farmers' Association for Sustainable Rural Development |
| AFOSP | ASEAN Farmers' Organisation Support Programme |
| AFSIS | ASEAN Food Security Information System |
| AFSRB | The ASEAN Food Security Reserve Board |
| AIFS SPA-FS | The ASEAN Integrated Food Security Framework and Strategic Planning of Actions |
| AKRU | Applied Knowledge Resources Unit |
| AMAF | ASEAN Ministers of Agriculture and Forestry |
| AMS | ASEAN Member States |
| APTERR | ASEAN Plus Three Emergency Rice Reserve |
| ASEAN | Association of Southeast Asian Nations |
| ASEC | ASEAN Secretariat |
| 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 Agricultural Cooperative |
| ASWGC | ASEAN Sectoral Working Group on Crops |
| ASWGL | ASEAN Sectoral Working Group on Livestock |
| ASWG-SF | ASEAN Sectoral Working Group on Social Forestry |
| ATMI | Agricultural Transformation and Market Integration |
| AWPB | Annual Work Plan and Budget |
| ATWG | ASEAN Technical Working Group |
| ATWGARD | ASEAN Technical Working Group on Crops and Livestock and Agricultural Research and Development |
| CEMAFI | UPLB-College of Economics and Management Alumni Foundation |
| CESD | The Centre for Economic and Social Development |
| CGIAR | Consortium of International Agricultural Research Centers |
| CIFOR | Center for International Forestry Research |
| CLMVP | Cambodia, Lao People's Democratic Republic, Myanmar, Viet Nam, and the Philippines |
| CN | Concept Note |
| COP | Conference of the Parties |
| COVID-19 | Coronavirus Disease 2019 |
| CPM | Country Programme Manager |

| | |
|--------|--|
| CPRT | Cambodia Policy Roundtable |
| CSO | Civil Society Organization |
| DA | Department of Agriculture |
| DOA | Department of Agriculture |
| DTI | Department of Trade and Industry |
| EECP | European Chamber of Commerce of the Philippines |
| ERIA | Economic Research Institute for ASEAN and East Asia |
| ESI | Entrepreneurship, Start-ups, Innovation |
| EU | European Union |
| FAFD | Food, Agriculture, and Forestry Division |
| FAO | The Food and Agriculture Organization of the United Nations |
| FGDs | Focus Group Discussions |
| FO | Farmers' Organization |
| GALA | Grow Asia Learning Alliance |
| GEIDD | Graduate Education and Institutional Development Department |
| HLPF | High-level Policy Forum |
| IFAD | International Fund for Agricultural Development |
| IFPRI | International Food Policy Research Institute |
| IISD | The International Institute for Sustainable Development |
| IPGN | IFAD Philippines Gender Network |
| IPSARD | Institute of Policy and Strategy for Agriculture and Rural Development |
| KM | Knowledge Management |
| KMD | Knowledge Management Department |
| KRU | Knowledge Resources Unit |
| LVC | La Via Campesina |
| MAF | Ministry of Agriculture and Forestry |
| MAFF | Ministry of Agriculture, Forestry, and Fisheries |
| MKLF | Mekong Hub Knowledge and Learning Fair |
| MoA | Memorandum of Agreement |
| MoALI | Ministry of Agriculture, Livestock, and Irrigation |
| MPRT | Myanmar Policy Roundtable |
| MS | Master |
| MTCP2 | Medium Term Cooperation Programme 2 |
| NePAAA | Network of Policy Advisors and Analysts in ASEAN |
| NFP | National Focal Points |
| NIW | National Inception Workshops |
| NPSC | National Project Steering Committee |
| N-SPA | National Strategic Plans of Action |
| OECD | The Organization for Economic Cooperation and Development |
| Op-ed | Opinion editorial |

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| PCU | Project Coordination Unit |
| PhD | Doctor of Philosophy |
| PIDS | Philippine Institute for Development Studies |
| PPSA | Philippines Partnership for Sustainable Agriculture |
| PRT | Policy Roundtable |
| PSC | Project Steering Committee |
| PSU | Project Support Unit |
| PY | Project Year |
| ReSAKSS | The Regional Strategic Analysis and Knowledge Support System |
| RSAA | Regional SEARCA Alumni Association |
| RPSC | Regional Project Steering Committee |
| RTLD | Research and Thought Leadership Department |
| SA | South Asia |
| SAP | Sustainable Agriculture Forum |
| SDC | The Swiss Agency for Development and Cooperation |
| SEA | Southeast Asia |
| SEARCA | Southeast Asian Regional Center for Graduate Study and Research in Agriculture |
| SOM-AMAF | Senior Officials Meeting of ASEAN Ministers on Agriculture and Forestry |
| SSRPs | Small-Scale Rural Producers |
| TA | Technical Assistance |
| TU | Training Unit |
| TWG | Technical Working Group |
| UGM | Universitas Gadjah Mada/ Gadjah Mada University |
| UPLB | University of the Philippines Los Baños |
| UPM | Universiti Putra Malaysia |
| USA | United States of America |
| USD | United States Dollar |
| VCA | Value Chain Assessment |
| VCB-N | Value-chain Capacity Building Network |
| VPRT | Viet Nam Policy Roundtable |

Foreword

We are grateful that the Agricultural Transformation and Market Integration in ASEAN Region: Responding to Food Security and Inclusiveness Concerns (ATMI-ASEAN) project has been successfully completed in 2022. Little did we know when the project was launched in 2016 that we would face the COVID-19 global pandemic of unprecedented magnitude during the implementation period. Most countries had to implement movement restrictions to a complete lockdown to limit virus outbreaks given that the virus was highly transmissible, leading to major interruptions in all sectors of the economy globally.

The ATMI-ASEAN project work also got affected by the pandemic. Many project activities were put on hold during the worldwide movement restrictions and lockdown. Not only that, the project needed to be extended to complete its original plans. Many adjustments were made to implement the project. It was thus only in 2022, when most countries had started to open their borders, that the ATMI-ASEAN team and stakeholders were able to meet in-person again for the last time before the closure of the project.

The project has reached out to many stakeholders across countries in the Southeast Asia (SEA) region throughout the six years of its implementation, achieving several milestones. Many studies were produced about the ASEAN both at the regional and the country levels, capacity-building programs were organized, and technical assistance was provided to project countries and regional organizations.

The completion of the ATMI-ASEAN project is not the end of the collaboration of IFPRI, SEARCA, IFAD, countries partners, and regional organizations in SEA. The ATMI-ASEAN project legacy will work hand-in-hand again through the Network of Policy Advisors and Analysts in ASEAN (NePAAA) to build the network in the SEA region.

Executive Summary

The ATMI-ASEAN project was launched on October 7–8, 2016, in the Philippines. It is a five-year project funded by International Funds for Agriculture Development (IFAD) with a year’s extension due to the Coronavirus disease 2019 (COVID-19) pandemic. The implementation of the project was led by the International Food Policy Research Institute (IFPRI) and co-implemented by the Southeast Asian Regional Center for Graduate Study and Research in Agriculture (SEARCA).

The ATMI-ASEAN project comprises three main components: Component 1. Policy studies and expert workshops; Component 2. High-level policy forums (HLPFs) and roundtables; and Component 3. Technical assistance for planning and policy development. Each component was scheduled and implemented over the project implementation from 2016 to 2021, then extended for a year to finalize the project implementation affected by the COVID-19 pandemic. This report elaborates on all project outputs throughout the implementation.

Component 1. Policy studies and expert workshops will consist of the report on the operational unit establishment and its project team member, countries’ engagement, analysis of long-term implications of structural and rural transformation of the ASEAN economies on food security and small-scale rural producers, analysis of national strategies and policies that promote the competitiveness of small-scale rural producers and their inclusion in regional agri-food markets, and annual reviews of ASEAN multi-country cooperation initiatives to promote small-scale rural producers in relation to strategic regional agri-food value chains.

Component 2. HLPFs and roundtables will comprise report on the organization of HLPFs, roundtables aimed at developing national strategic plan of action for the promotion of small-scale rural producers in the context of the ASEAN Common Market, and engagement at the national and regional forum.

Component 3. Technical assistance for planning and policy development will consist of the report on technical assistance to the ASEAN Ministers of Agriculture and Forestry–Civil Society Organization / Farmers’ Organization (AMAF–CSO/FO) for the preparation of roadmaps for the development of strategic agri-food regional value chains, capacity building, technical assistance to the ASEAN Member States (AMS) and national platforms under the AMAF–CSO/FO Annual Forum for the preparation of National Strategic Plans of Action (N-SPA), and other technical assistance at the regional level.

There were changes in the team members from IFPRI, SEARCA, and countries' representatives during the project implementation. The signatory process of the Memorandum of Agreements (MoAs) between the ATMI-ASEAN project and project countries' was a significant challenge during the project implementation at the country level. The biggest challenge faced during the ATMI-ASEAN project implementation was the COVID-19 pandemic. Many countries employed movement restrictions within their country and closed their borders during the outbreak. The project implementers had to reschedule several activities in response due to these travel restrictions and social distancing measures. This included, for example, organizing the National Project Steering Committees (NPSC) meetings in the project countries and national policy roundtables. In addition, the ATMI-ASEAN project needed to extend the project towards completion due to the pandemic. However, some official requirements were to be met, and the implementers were able to continue the project implementations on approval of the project extension request.

A. Summary of Activities

The matrix below shows the activities undertaken under each component (Table 1). It mentions the status, targeted output of the activity, the actual output, and the institutions responsible for the delivery.

Table 1. Summary of Activities

| Component No. | Activities | Targets |
|---|---|---|
| 1. Policy studies and expert workshops | | |
| 1.1. | <i>Hire policy facilitator and other required staff, organize regional and national inception workshops, interactions with national and regional partners, and prepare detailed regional and national work plans</i> | |
| | Hire policy facilitator | Policy facilitator hired |
| | Operate Project Coordination Unit (PCU) | PCU operational |
| | Operate Project Support Unit (PSU) | PSU operational |
| | Identify and engage National Focal Points (NFP) | All national focal points identified and engaged |
| | Organize national inception workshops | Inception workshops organized Five national work plans Five NPSCs operational One NPSC meeting per country per year |
| | Constitute and mobilize the NPSCs | Another NPSC meeting per country to be held back-to-back with other component activities (optional) |
| | Constitute and mobilize Regional Project Steering Committee (RPSC) | RPSC constituted and operational |
| | Network of Policy Advisors and Analysts in ASEAN (NePAAA) | NePAAA constituted |
| | 1.2 | <i>Analysis of long-term implications of structural and rural transformation of the ASEAN economies on food security and small-scale rural producers</i> |
| <i>Agricultural Transformation</i> | | |
| 1.3 | <i>Analysis of national strategies and policies that promote the competitiveness of small-scale rural producers and their inclusion in regional agri-food markets</i> | |
| | Conduct one study each per country focusing on national strategies and policies in Cambodia, Lao People's Democratic Republic, Myanmar, Viet Nam, and the Philippines (CLMVP) | One study each for the five countries |

| | | |
|--|---|--|
| | One graduate thesis grant per year | A total of five graduate theses grants were awarded within the project duration |
| | One study on AEC–SEARCA counterpart | One study on ASEAN Economic Community (AEC) supported |
| 1.4 | <i>Annual reviews of ASEAN multi-country cooperation initiatives to promote small-scale rural producers in relation to strategic regional agri-food value chains</i> | |
| | Annual review of ASEAN multi-country cooperation initiatives | IFPRI’s review of ASEAN multi-country cooperation initiatives for the fourth year of the project |
| 2. High-level policy forum and roundtables | | |
| 2.1. | <i>Organizing high-level policy forums</i> | |
| | Organize HLPFs | HLPF organized |
| 2.2. | <i>Organizing roundtables aimed at developing national strategic plan of action for the promotion of small-scale rural producers in the context of the ASEAN Common Market</i> | |
| | Organize roundtables at the national level | Two national-level roundtables organized per country |
| | Participate in AMAF and AMAF-CSO/FO Annual Forum | Participate in the AMAF and AMAF-CSO/FO Annual Forum |
| | Package national-level roundtable proceedings | Publish two national-level roundtable proceedings in connection with the two roundtables to be organized |
| | Organize one learning event (with in-kind contribution from SEARCA); back-to-back with selected roundtables | In-kind support provided to one learning event back-to-back with selected roundtables |
| 3. Technical assistance for planning and policy development | | |
| 3.1 | <i>Technical assistance (TA) to the AMAF-CSO/FOs for the preparation of Roadmaps for the development of strategic agri-food regional value chains</i> | |
| | TA for the preparation of ASEAN Value Chain Roadmaps | Preparatory activities for TA at the regional level |
| | Three relevant learning events (with in-kind contribution from SEARCA) | One relevant learning event provided with in-kind contribution |
| | TA to ASEAN Roadmap for Enhancing the Role of Agriculture Cooperative 2018–2025 | |
| | TA to support the midterm review of the ASEAN Integrated Food Security Framework and Strategic Planning of Actions (AIFS SPA-FS) 2015–2020 | |
| 3.2 | <i>Technical assistance to the AMS and national platforms under the AMAF-CSO/FO Annual Forum for the preparation of National Strategic Plans of Action</i> | |
| | TA to the AMS and national platforms under the AMAF-CSO/FO Annual Forum for the preparation of N-SPA | TA at the national level |

B. Project implementation

Component 1: Policy studies and expert workshops

1.1 Hire policy facilitator and other required staff, organize regional and national inception workshops, interactions with national and regional partners, and prepare detailed regional and national work plans

Hire policy facilitator

A policy facilitator is hired as IFPRI's representative in the SEA region to oversee and coordinate the program activities with key IFPRI researchers based in South Asia Regional Office in New Delhi (India), Washington, DC (USA), SEARCA (Philippines), and key partners, including the AMAF, AFA, and AsiaDHRRA. In addition, the policy facilitator enabled IFPRI to explore collaboration with local partners and organize HLPFs and regional workshops in project countries and ASEAN Headquarters. With support from the Center for International Forestry Research (CIFOR), the Consortium of International Agricultural Research Centers (CGIAR) sister organization based in Bogor, Indonesia, Ms. Aniq Fadhillah was selected as the policy facilitator and joined the project from May 1, 2018, until October 30, 2022.

Operate PCU

IFPRI established the PCU in 2016 at its regional office in New Delhi, India. The PCU manages the activities for which IFPRI is responsible for the project's duration. The initial team members are Dr. Pramod Kumar Joshi, the IFPRI South Asia Regional (SAR) Office director. IFPRI then assigned a team to lead the coordination and implementation of the activities related to studies, knowledge management, monitoring and evaluation, and financial management. It consists of Dr. Devesh Roy, Dr. Avinash Kishore, Ms. Jyotsana Dua, and Mr. Manmeet Ajmani. Ms. Aniq Fadhillah later remotely joined the team from Indonesia.



Figure 1. The ATMI-ASEAN Current and Former Team (2016–2022)

The PCU faced several team changes during the course of implementation. Dr. Avinash Kishore is no longer on the team; Dr. Shahidur Rashid is succeeding Dr. Joshi, who retired as the Director of IFPRI SAR. In the last year, Dr. Mamata Pradhan and Mr. Sunil Saroj joined the team, while Mr. Abul Kamar replaced Mr. Ajmani.

Operate PSU

Project Management Office at SEARCA. Joining as implementing partner of the ATMI-ASEAN Project, SEARCA, through its then-called Research and Development Department (RDD) led by the then-Program Head, Dr. Bessie M. Burgos, led the project management at the national-level and capacity building activities, with Dr. Burgos as the designated Principal Investigator of the project.

Dr. Pedcris M. Orencio succeeded Dr. Burgos, who retired in July 2018, and took over the role in September 2018 until July 31, 2022. There was assistance from Ms. Bernice Anne D. De Torres, Program Specialist of Research and Thought Leadership Department (RTLTD), who also previously served as ATMI-ASEAN Project Associate. Dr. Gerlie T. Tatlonghari, the new RTLTD Program Head as of September 1, 2022, has joined the team to oversee the implementation and overall management of the project as it comes to a close by end of the month.

The Project Team was established in SEARCA headquarters in Los Baños, Laguna, Philippines and was previously composed of Mr. Jimmy B. Williams, Adjunct Associate Professor from the Department of Agribusiness Management and Entrepreneurship, College of Economics and Management (CEM), University of the Philippines Los Baños (UPLB), as the PSU Coordinator from March 23, 2017, until May 31, 2021, Ms. De Torres as Project Associate from April 24, 2017, until November 15, 2018, and Ms. Loise Ann M. Carandang as Project Support Staff from April 1, 2017, until June 30, 2018, as Project Assistant until February 24, 2019, and as Project Associate since February 25, 2019.

Ms. Pauline D. Gonzales joined the PSU initially as Project Support Staff from June 3, 2019, until June 30, 2021, and then has served as Project Assistant since July 1, 2021. Mr. Paul Joseph B. Ramirez, Assistant Professor from the Department of Economics, CEM, UPLB, was engaged to take over the PSU Coordinator role from September 1, 2021. Meanwhile, Dr. Lily Ann D. Lando was hired as the Knowledge Management (KM) Expert beginning April 4, 2022. Her major deliverables include the Guidebook on National Roadmap Development, which is part of Component 3.2.

Organize launch workshop

IFPRI, SEARCA, and IFAD organized a workshop in Los Baños to launch the “Agricultural Transformation and Market Integration in the ASEAN Region: Responding to Food Security and Inclusiveness Concerns” project. The workshop was organized on October 7–8, 2016. Sixty experts and distinguished luminaries from international organizations, government agencies, academic institutions, civil society, and the private sector participated in the workshop. They represented Cambodia, the Lao People's Democratic Republic (PDR), Myanmar, the Philippines, Viet Nam, China, India, the United States of America, and Italy. The gender-wise distribution of the participants in the workshop was: Female – 26 and Male – 34.

The workshop was successful in realizing the following outputs:

- A common understanding of the objectives of the project among partners and implementers

- An understanding of structural transformation and market integration and their implications on food security and inclusiveness in the ASEAN region
- Emphasizing the need for the development of draft work plans at regional and national levels to achieve project outcomes

The workshop proceeding can be accessed [here](#).

- *Organize national inception workshop*

In coordination with IFAD and partner institutions, the implementers organized National Inception Workshops (NIWs) in the CLMVP project countries.

The inception workshops were successful in realizing the following outputs:

- A common understanding of the objectives of the project among partners and implementers
- An understanding of structural transformation and market integration and their implications on food security and inclusiveness
- Identifying priority commodities for regional and global value chains analysis
- Developing a draft action plan for implementing the program

The date, venue, and number of participants in each inception workshop are given below in Table 2.

Table 2. Details on National Inception Workshops

| Date | Country | Participants |
|--------------------|------------------------------------|-------------------------------------|
| March 27–28, 2017 | Phnom Penh, Cambodia | Total: 56 Female: 14 Male: 42 |
| March 30–31, 2017 | Nay Pyi Taw, Myanmar | Total: 73 Female: 36 Male: 37 |
| April 27–28, 2017 | Hanoi, Viet Nam | Total: 83 Female: 25 Male: 58 |
| June 22–23, 2017 | Vientiane, Lao PDR | Total: 42 Female: 10 Male: 32 |
| August 10–11, 2017 | Los Baños, Laguna, the Philippines | Total: 49 |

The Summary Reports of the NIWs can be accessed [here](#).

Identify National Focal Points

Implementers identified and engaged National Focal Points and agencies in the five target countries of the CLMVP. Their engagement formally commenced during the conduct of their respective NIWs.

The concerned National Focal Points coordinated with SEARCA, IFPRI, and IFAD in organizing national level activities (workshops, meetings, and policy roundtables) of the ATMI-ASEAN project in their respective countries. These local partners mobilized the participation of key stakeholders by issuing invitations to and coordinating with local resource speakers and participants. In addition, they made local logistical arrangements (venue, travel, food, and hotel accommodation), as well as assisted in the documentation of the workshop/event proceedings.

The details are listed in Table 3.

Table 3. ATMI-ASEAN National Focal Points/Agencies

| Country | Focal Point | Institution/Ministry |
|----------------|--|---|
| Cambodia | Mr. Cheattho Prak, Deputy Director | General Directorate of Agriculture (GDA), Ministry of Agriculture, Forestry, and Fisheries (MAFF) |
| Lao PDR | Ms. Phougneun Phosalath Head of Technical Management Section, Agronomy Management Division Former: Dr. Phanpradith Phandara | Department of Agriculture (DOA), Ministry of Agriculture and Forestry (MAF) |
| Myanmar | U Kyaw Swe Lin, Deputy Director General | Department of Planning (DOP), Ministry of Agriculture, Livestock, and Irrigation (MoALI) |
| Viet Nam | Dr. Tran Cong Thang, Director General Dr. William C. Medrano | Institute of Policy and Strategy for Agriculture and Rural Development (IPSARD), Ministry of Agriculture and Rural Development (MARD) |

Completion Report

The
Philippines

Undersecretary for Livestock
Former: Mr. Leroy A. Panes

Department of Agriculture (DA), the
Philippines

Constitute and mobilize the NPSCs

The next steps in implementing the various components of the project in the countries were discussed during the NIWs, including the constitution of the NPSCs. Signed and legalized MoAs have been forged between SEARCA and the national focal agencies to formalize the establishment of the NPSC in each of the five target AMS. SEARCA signed MoAs with MAFF of Cambodia and with IPSARD of Viet Nam in September 2017, and then with MoALI of Myanmar in April 2018. The MoA between SEARCA and the Department of Agriculture (DA) of the Philippines was signed on July 12, 2018, while the one between SEARCA and Lao PDR was signed on October 23, 2018.



Figure 2. NPSC Meeting in Myanmar



Figure 3. NPSC Meeting in the Philippines



Figure 4. NPSC Meeting in Viet Nam



Figure 5. NPSC Meeting in Cambodia



Figure 6. NPSC Meeting in Lao PDR

Members of the NPSCs convened for in-person meetings (**Figure 7**) organized by the focal agency with support from SEARCA prior to the COVID-19 pandemic to discuss the progress and/or completion of the agreed ATMI-ASEAN activities in their respective countries. Following these and in view of the pandemic, the focal agencies found that it would be ideal to convene the NPSC only if the need arises. The 3rd Lao PDR NPSC meeting was supposed to be organized in March 2020. However, lockdowns were enforced due to COVID-19 and it was only in May 2022 that the stakeholders gathered to concur on the policy study conducted by the research team from the National

University of Laos (NUoL) and the National Agriculture and Forestry Research Institute (NAFRI) (Component 2.2).

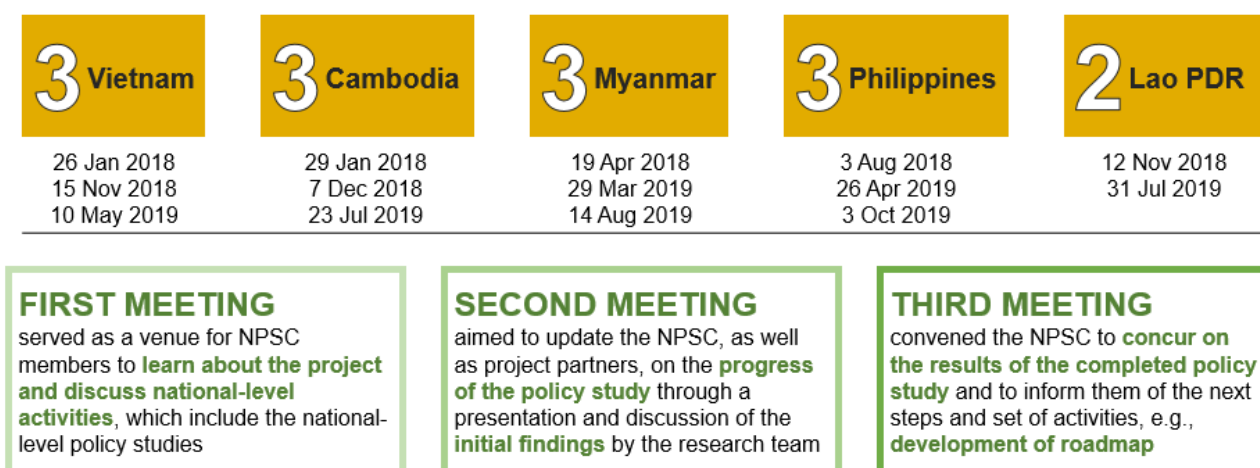


Figure 7. NPSC meetings conducted, by country

1.1.1 *Constitute and mobilize RPSC*

RPSC was constituted in Phnom Penh on December 12, 2018.

1st RPSC meeting

The 1st RPSC meeting was organized on December 12, 2018 and chaired by a national focal point from the host country, the Royal Kingdom of Cambodia, Mr. Prak Cheattho.



Figure 8. 1st RPSC Meeting, December 12, 2018, Cambodia

Completion Report

It was attended by 17 participants drawn from national focal points, researchers, the IFAD representative, chairperson, members of the ASEAN Technical Working Groups on Agriculture Cooperatives (ASWGAC) and the ASEAN Technical Working Group on Crops (ASWGC), and the principal investigators and project team members from IFPRI and SEARCA. The committee provided overall guidance to bring convergence in the activities taken by AMS to achieve the project goals.

2nd RPSC meeting

The 2nd RPSC meeting was organized in Bangkok, Thailand, on November 30, 2019. It was attended by 22 participants from national focal points, researchers, the Asian Farmers' Association for Sustainable Rural Development (AFA) representative, the Asian Partnership for the Development of Human Resources in Rural Asia (AsiaDHRRA) representative, the IFAD representative, and the principal investigators and project team members from IFPRI and SEARCA.



Figure 9. 2nd RPSC Meeting, November 30, 2019, Thailand

The meeting discussed ATMI-ASEAN project activities, especially those which would be executed in 2020. The discussion focused more on finding solutions to challenges faced by all the stakeholders in the project in the RPSC meeting. The agenda comprised discussions on national studies, TA in developing regional value chain road-mapping on the targeted commodities, the NePAAA, and HLPF in 2020.

Completion Report

3rd RPSC meeting

The 3rd RPSC meeting was organized virtually through the zoom meeting platform on January 27–28, 2021. It was initially planned to be organized in March 2020, but with the COVID-19 outbreak followed by lockdown in most countries, the meeting was postponed and organized virtually.

The meeting was attended by 33 participants drawn from IFAD, IFPRI, SEARCA, members of the RPSCs and focal points of NPSCs from Cambodia, Lao PDR, Myanmar, the Philippines, and Viet Nam, national researchers from Cambodia, Lao PDR, and Viet Nam, representatives from AsiaDHRRA, Grow Asia, and the ASEAN Secretariat, and academe from Philippine Institute for Development Studies (PIDS), NEXUS Agribusiness Solutions, and the Universitas Gadjah Mada / Gadjah Mada University (UGM), Indonesia.

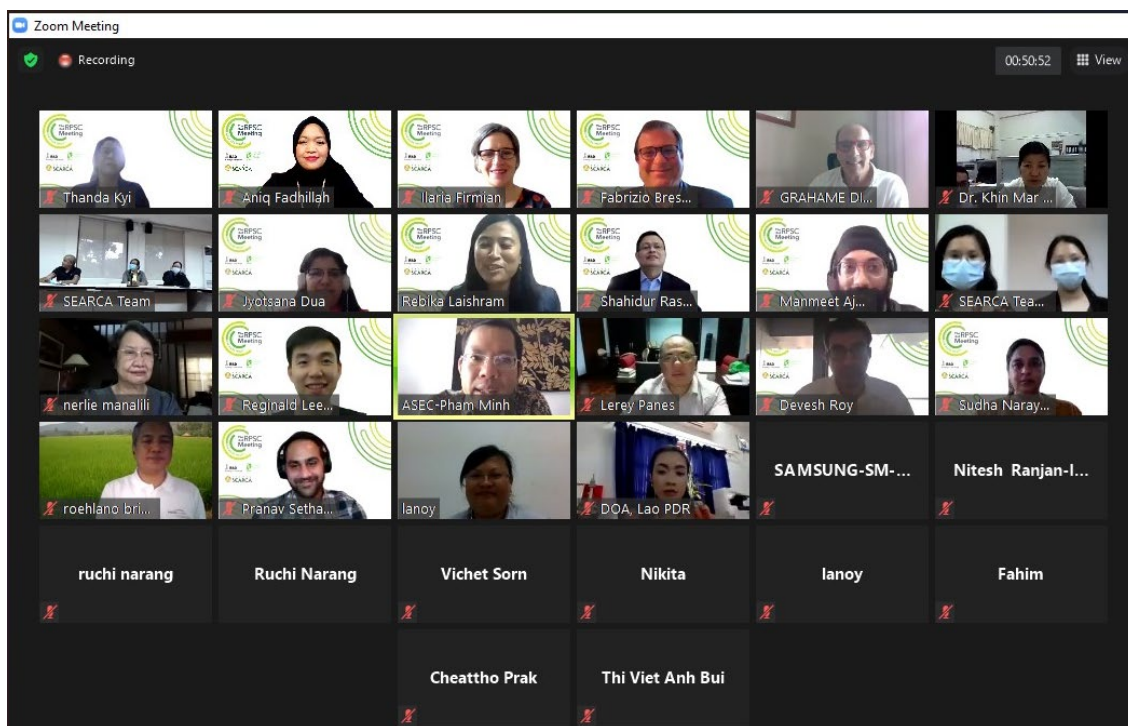


Figure 10. 3rd RPSC Meeting (Hybrid), January 27–28, 2021

The meeting was organized to follow up on the ongoing project activities discussed at the 2nd RPSC organized on November 30, 2019, in Bangkok, Thailand. It endorsed project activities in 2021 and discussed strategies to achieve project outcomes to provide baselines to improve existing or develop new laws, regulations, and policies in project target countries.

1.2 Analysis of long-term implications of structural and rural transformation of the ASEAN economies on food security and small-scale rural producers

IFPRI, upon consultation with SEARCA, IFAD, and partner institutions, initiated and completed the following policy studies related to agricultural transformation and market integration research themes.

The studies related to ATMI will help the beneficiaries of the project, such as the AMAF, Farmer Producer Organisations (FPOs), and the ASEC, in the following ways:

- a) Research highlights trade and market opportunities emerging from market integration that will benefit smallholder farmers and their organizations in the targeted project countries.
- b) Agricultural transformation studies examine transformation in the agri-food systems in the ASEAN countries. They facilitate the beneficiaries by highlighting the structural adjustment in the country's farm sector, the problems and their causative factors, and different policy solutions at their disposal.

1.2.1 Agricultural transformation studies

There are five studies under agricultural transformation themes, as mentioned in Table 4.

Table 4. List of Agricultural Transformation Studies

| Serial # | Suggested research topic | Study completed | Output form | Date |
|----------|--|--|------------------|------------|
| 1 | Agricultural transformation and market innovation: theory concepts and definitions | Agricultural transformation and market innovation: theory concepts and definitions | Report | 2018 |
| 2 | Overview of the agricultural modernization in Southeast Asia | Overview of the agricultural modernization in Southeast Asia | Discussion paper | March 2019 |
| 3 | Transformation and sources of growth in Southeast Asian agriculture | Transformation and sources of growth in Southeast Asian agriculture | Discussion paper | May 2019 |
| 4 | Structural transformation in Southeast Asian | Structural transformation in Southeast Asian countries and key drivers | Discussion paper | July 2019 |

| | | | | |
|---|---|---|------------------|------------|
| | countries and key drivers | | | |
| 5 | Micro-analyses of smallholder participation in agricultural transformation and market integration in Southeast Asia | Agri-food market participation, household economies of specialization and diversification: Evidence from Viet Nam | Discussion paper | April 2020 |

Agricultural transformation and market innovation: Theory, concepts, and definitions

Agriculture was historically seen as a contributor that helped induce industrial growth and structural transformation of the economy. The structural transformation where the share of agriculture in the gross domestic product (GDP) and employment declines as per capita income rises is well documented. Classical theorists, led by

Lewis (1954) viewed economic development as a growth process of relocating factors of production from an agricultural sector characterized by low productivity and the use of traditional technology to a modern industrial sector with higher productivity. Economic transformation is triggered when agriculture realizes enough surplus in the form of food and factor markets begin to integrate across space, and workers begin to move out of agriculture to meet the demands of a growing industrial sector.



Figure 12. Theory, Concept, and Definitions
 Details of the study can be found here: [Agricultural transformation and market innovation: theory concepts and definitions.](#)

Overview of the agricultural modernization in Southeast Asia

Despite the importance of the SEA region in the world for economy and agriculture, and despite reported evidence of the modernization of various aspects of the agricultural sector, information has not been compiled in ways that provide more representative insights into the region, as well as its chronological and dynamic perspectives across different aspects of the overall agricultural developments.



This report partly fills this knowledge gap by summarizing the key characteristics in the SEA region pertaining to agricultural development as well as changes in related outcomes such as nutrition, natural resource endowments, and the labor movement into non-farm economies. In doing so, the report gathers secondary cross-country data on key aspects of agricultural modernization and diversification.

Figure 13. Discussion Paper

Overall, the SEA region has seen a relatively fast movement of labor out of the agricultural sector into non-farm sectors including trade, restaurants, and hotel industries in the last few decades, leading to higher labor productivity growth than land productivity growth. Agricultural production within the region and in each country continues to account for important sources of food and nutrition despite the important roles of trade. Modern production technologies and inputs have spread constantly within the region, but with considerable time lags across countries.

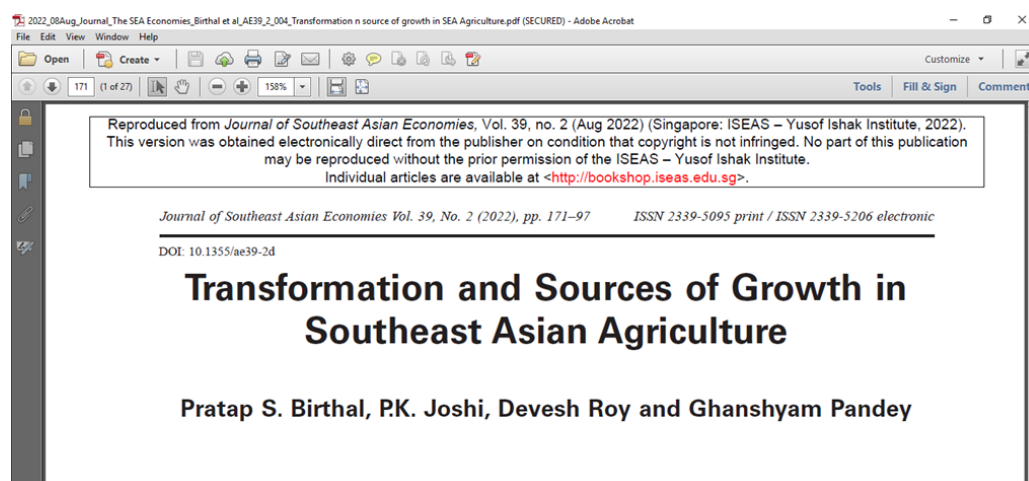
The growth of vegetable oils and aquaculture production has considerably contrasted with South Asia (SA), where similar patterns have been observed for vegetables and milk production. The public sector has played important roles in agricultural research

and development (R&D) on genetic improvements and infrastructure development while maintaining nominal assistance to the sector through market interventions at a relatively modest level. This has been accompanied by significant growth of private sector participation in the provisions of inputs, services, and agricultural finance.

The agricultural modernization in SEA region has, however, also been associated with some negative outcomes, including continued degradation of natural resources like water and forest areas in which historically the region has been relatively rich and gradual increases in certain types of malnutrition, including overweight and diabetes. Details of the study can be accessed here: [Overview of the agricultural modernization in Southeast Asia.](#)

Transformation and sources of growth in Southeast Asian agriculture

The agricultural sector of SEA has experienced robust growth over the past few decades, and has undergone a structural transformation, albeit differentially, across the countries in the region. The main aim of this paper is to understand the process of transformation and sources of growth in agriculture in the broader context of economy-wide changes in domestic and international markets, and to suggest technological, institutional, and policy measures for faster, efficient, and sustainable growth. Our findings show faster growth in agriculture in comparatively low-income countries, with technological change, area expansion, and diversification being the main drivers.



On the other hand, agricultural growth in high-income countries has been relatively slow and driven by area expansion and price increases mainly of the export-oriented commercial crops, such as oil-palm, rubber, and coconut. Area and price-driven growth is unlikely to sustain in the long-run in view of the fixed supply of land and high volatility in global food prices.



Figure 14. Discussion Paper

The recourse for efficient, sustainable, and inclusive growth has to be in exploiting the potential of (i) existing and frontier technologies by investing more in agricultural research and extension systems, and by (ii) diversification of production portfolio towards higher-value food commodities by strengthening institutions that link farmers to remunerative markets, and through investing in post-harvest infrastructure for food processing.

Details of the study can be accessed here: [Transformation and sources of growth in Southeast Asian agriculture](#). It has also been published in [the Journal of Southeast Asian Economies Volume 39 Number 2](#).

Structural transformation in Southeast Asian countries and key drivers

This study's objective is to examine the factors that have driven structural transformation in the SEA economies and the policies supporting the process. It sets the stage by evaluating the structural transformation in each country, quantifying the contribution of "within sector" and "structural change" to overall productivity growth, and estimating the turning points to gauge the prospects of income convergence. Eight SEA countries undergoing a steady rate of economic growth —Cambodia, Lao PDR,

Myanmar, Viet Nam, the Philippines, Malaysia, Indonesia, and Thailand (CLMVPMIT) are chosen for analysis.

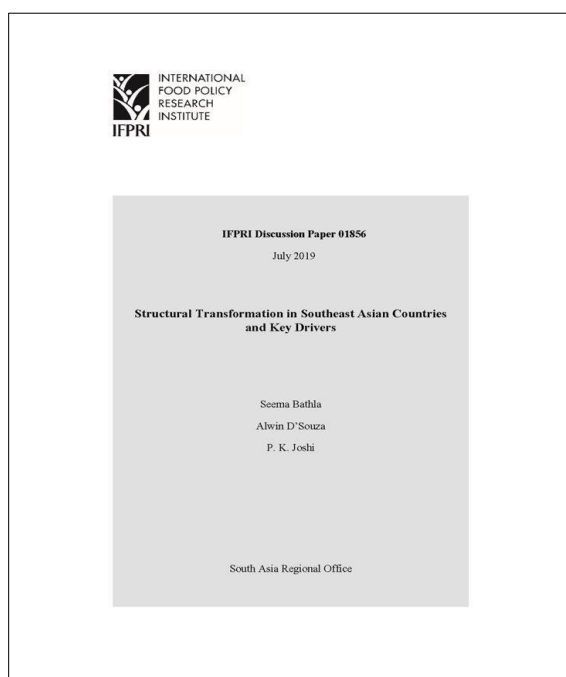


Figure 15. Discussion Paper

We find their progress on structural transformation to be consistent with the theory and historical patterns experienced in several developed and developing countries. However, progress is diverse across these countries and lags behind developed countries, indicating that labor is not exiting agriculture as fast as agriculture's share of value addition has been declining. The structural transformation has decreased from 49 percent in Thailand to almost 3

percent each in Cambodia and Malaysia between 1991 to 2016.

Further, the contribution of within change to productivity, which was pivotal during the 1990s in each country, is rather subdued during the 2000s, thereby giving comparative primacy to structural change. A relatively higher—57 to 80 percent—contribution of structural change in Cambodia and Lao PDR, together with productivity growth, may be explained by increasing migration and trade in non-agricultural products. We also find that while Lao PDR, Thailand, and Indonesia have reached their turning points, other nations, especially the poorer ones such as Viet Nam, Myanmar, and the Philippines, are predicted to take at least a decade towards attaining this goal. Empirical analysis suggests structural transformation in CLMVPMIT is positively driven by agricultural productivity, terms of trade, and public investments in infrastructure, with little role for rural-to-urban migration and market integration. Large inter-sectoral productivity differentials across SEA countries, other than in Cambodia and Malaysia, necessitate the acceleration of a disproportionate agricultural

share of the labor force in agriculture through higher productivity. Details of the study can be seen here: [Structural transformation in Southeast Asian countries and key drivers.](#)

Micro-analyses of smallholder participation in agricultural transformation and market integration in Southeast Asia

Despite the growth of agri-food markets and gradual structural transformation, smallholders persist in Asia. Such patterns are at odds with the views that market growth should encourage more specialization whereby smallholders' transition to either larger farmers or specialized non-farm households. Using the panel household data in Viet Nam, this study investigates how participation in agri-food markets affect smallholder households' economies of scope in diversifying into agriculture and non-agricultural income-earning activities.

We find that greater agri-food market participation proxied by the increased food purchase generally increases economies of scope between agriculture and non-agricultural activities at the household level.

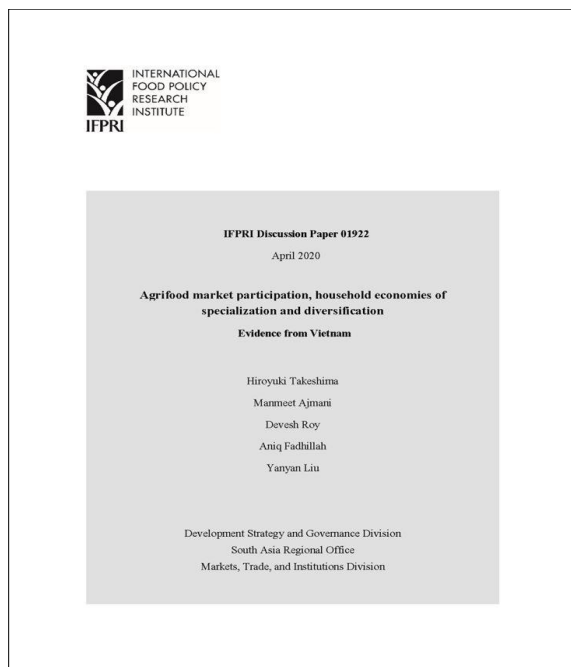


Figure 16. Discussion Paper

The results shed more light on how exactly smallholders in Viet Nam persist in the face of agri-food market growth and what kind of relations can be promoted in such a

Moreover, it leads to greater labor productivity in agriculture and also increases female household members' diversifications into both agriculture and non-agricultural income-earning activities. These effects are relatively stronger and more consistent than conventional indicators of agri-food product sales or proximity to the market.

growing market in ways that enhance their livelihoods in short to medium terms.

Details of the study can be accessed here: [Agri-food market participation, household economies of specialization and diversification: Evidence from Viet Nam.](#)

1.2.2 Market integration studies

Four studies were completed under market integration themes, as mentioned in Table 5.

Table 5. List of Market Integration Studies

| Serial # | Suggested research topic | Study completed | Output form | Date |
|----------|---|---|------------------|---------------|
| 1 | Market Integration in Agricultural Products within ASEAN | Market integration with ASEAN and beyond: The case of Myanmar | Discussion paper | November 2018 |
| 2 | | Assessing agricultural market integration of Cambodia within and beyond ASEAN | Discussion paper | June 2019 |
| 3 | Regional market integration: Assessment of agricultural trade potential between ASEAN and South Asian countries | ASEAN, SAARC, and the indomitable China in food trade: A gravity model analysis of trade patterns | Discussion paper | March 2020 |
| 4 | Strengthening value chain to benefit smallholders: A policy analysis on Myanmar's pulse production for India | India's pulse policy landscape and its implications for trade | Discussion paper | April 2022 |

Market integration in agricultural products within ASEAN

In this paper, we address the question of market integration of Myanmar with ASEAN and its other top trading partners. Focusing on agricultural trade, we use the two indicators of 'Trade Potential' and 'Competition Indices' to assess the nature and extent of the integration. This study highlights the exports of Myanmar, which are competitive in the ASEAN markets and have high export potential.

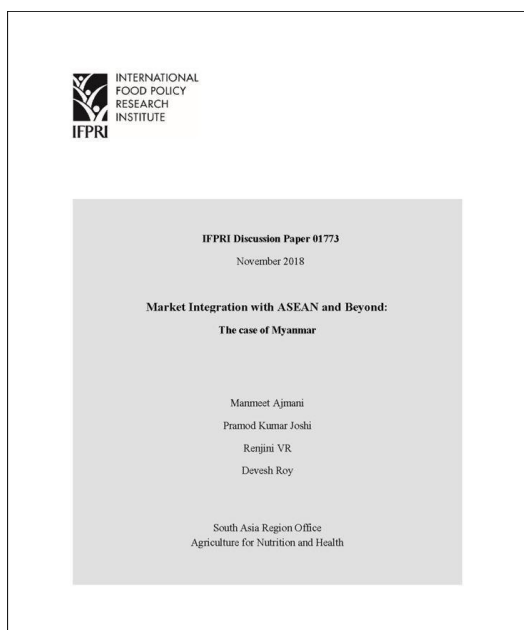


Figure 17. Discussion Paper

A higher trade potential with lower competition (value or volume) would indicate an opportunity for higher returns for agricultural producers. In the case of Myanmar, “dried legumes and beans,” “crustaceans,” “frozen fish,” “other oilseeds,” “maize,” and “preserved fruits and nuts” are identified as high-potential exports with lower competition in ASEAN markets which can be targeted for trade expansion.

Finally, we present the dynamics of the unit value of Myanmar’s agricultural exports to demonstrate the upward movement in the value chain, possibly due to quality upgradation. The study details can be found here: [Market integration with ASEAN and beyond: The case of Myanmar.](#)

The second study addressed the question of the agricultural market integration of Cambodia within the ASEAN and its other top trading partners. Focusing on agricultural trade, the indicators “Trade Potential” and “Competition Indices” are used to assess the nature and extent of the integration.

Specifically, the exports of Cambodia with high export potential and comparatively low competition in export markets are identified. Higher trade potential with lower competition (value or volume) indicates an opportunity for higher returns for agricultural producers. In the case of Cambodia, “maize” and “starches” are identified as high-potential exports with the lower intra-ASEAN competition.

There is also scope for regional cooperation in traditional exports such as “rice,” “manioc (cassava),” “molasses,” and “pepper” between Cambodia and other Southeast Asian countries, for which both the export potential and intra-ASEAN competition are high. Finally, to demonstrate the upward movement in the value chain, possibly due

to quality upgradation, the dynamics of the unit values of Cambodia’s agricultural exports is presented. Details of the study can be accessed here: [Assessing agricultural market integration of Cambodia within and beyond ASEAN.](#)



Policy brief accessed here: [India's self-sufficiency policies for pulses and their implications for Myanmar.](#)

An op-ed entitled '[How Did Sanction Impact Myanmar?](#)' was published in *The Diplomat* on January 6, 2018. This article highlights the importance of market integration to absorb adverse shocks, including natural calamities and discrete

Figure 18. Policy Brief



Figure 19. Op-ed in The Diplomat

trade barriers such as through political and economic sanctions. It focuses on the role of ASEAN+3 countries in facilitating Myanmar’s coping with the effects of sanctions.

Regional market integration: Assessment of agricultural trade potential between ASEAN and South Asian countries

Food trade among and across the two Asian trading blocs of ASEAN and the South Asian Association for Regional Cooperation (SAARC) and China has been assessed. Subpar trade has been found for several countries using the most recent innovations in the empirical trade model, though some over-trading is seen as well, likely driven by weak economic fundamentals determining trade.

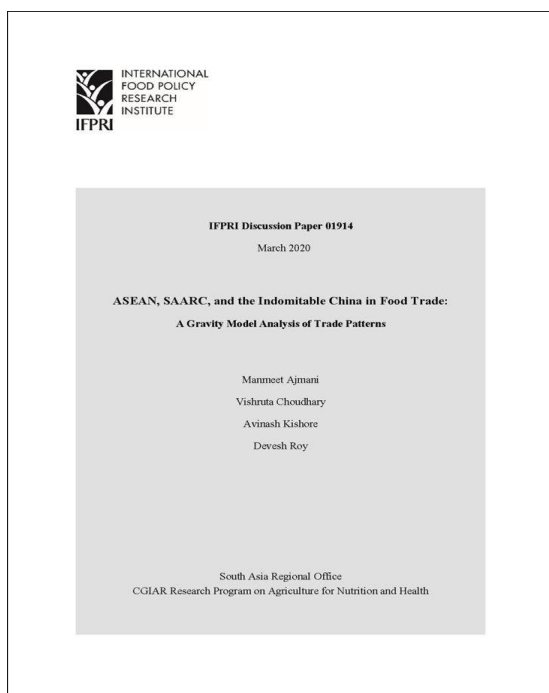


Figure 20. Discussion Paper

Further, we find that Bangladesh, Philippines, Sri Lanka, and Viet Nam under-export to China, as well as to nearly all ASEAN and SAARC countries, with the magnitude varying between 40 to 100 percent below the predicted trade levels. While checking for competing explanations, trading pair time-variant factors such as tariffs reducing the magnitude of under-exporting of ASEAN and SAARC countries by 1 and 3 percent, respectively, have been identified.

We also highlight unobserved variables such as trust between countries as factors important for strong agricultural trade. The study details can be found on [ASEAN, SAARC, and the indomitable China in food trade: A gravity model analysis of trade patterns.](#)

Strengthening value chain to benefit smallholders: A policy analysis on Myanmar's pulse production for India

The paper attempts to fill a knowledge gap by examining India's pulse complex, consisting of production, consumption, and trade policies. India's pulse policies are anchored in a cereal-centric farming system and prioritize national self-sufficiency as well as the mitigation of relative price increases in food. On the farmer side, government policy includes price support (a minimum support price [MSP]) for different pulses initially without procurement but later backed by public procurement.



Figure 21. Discussion Paper domestic prices. Instantaneous supply adjustments by exporters in response to trade policy changes are difficult. The study details can be found on [India's pulse policy landscape and its implications for trade](#).

1.2.2.1 *A synthesis paper of market integration in Cambodia, Lao PDR, Myanmar, Viet Nam, and the Philippines*

IFPRI has undertaken a research study focusing on the five targeted AMS market integration as per the project stakeholders' and participants' requests at the policy roundtables and forums. It uses the methodologies used in the discussion papers on market integration of Cambodia and Myanmar.

The study entitled “A synthesis paper of market integration in Cambodia, Lao PDR, Myanmar, Viet Nam, and the Philippines” will use the UN Comtrade data to calculate measures of export potential and export competition for the CLMVP countries. The potential and competition for agricultural exports will be highlighted for top commodities and top importing destinations with data updated till pre-COVID period, that is, 2019. It will present the dynamics of agricultural exports' prices / unit values to demonstrate the upward movement in the value chain, possibly due to quality upgradation.

Data and analysis were updated to the year 2019 during this reporting period for these targeted AMS in the project.

1.2.3 A book on Agricultural Transformation and Market integration in the ASEAN Region: Responding to Food Security and Inclusiveness Concerns

The book will compile studies led by IFPRI and SEARCA as chapters. The chapters will highlight the ASEAN's long-term structural transformations and impact on agricultural and food markets in the context of the subregion's market integration. The book will also highlight the national strategies and policies in the five selected AMS to promote the competitiveness of small-scale rural producers and their inclusion in regional agri-food value chains.

The book, akin to setting up of NePAAA, is not a commitment of IFPRI to IFAD; still, IFPRI would share the book's manuscript with IFAD once it is prepared as it can be an important vehicle for dissemination of a large body of work generated by ATMI-ASEAN project in the context of agricultural transformation and market integration in ASEAN countries. Therefore, it is not a time-bound activity before the project completion report.

1.3 Analysis of national strategies and policies that promote the competitiveness of small-scale rural producers and their inclusion in regional agri-food markets

SEARCA identified priority commodities for the conduct of national policy studies in the CLMVP countries in coordination with the national focal agencies. These focused on national strategies and policies to promote the competitiveness of small-scale rural producers and their inclusion in regional agri-food value chains.

1.3.1 Conduct one study each per country focusing on national strategies and policies

Implementers organized a focal points and researchers meeting and a training workshop on Rapid Value Chain Assessment for the targeted AMS from October 31 to November 3, 2017, in Bangkok, Thailand. Dr. Carlos A. da Silva, former Senior Agribusiness Economist of the Rural Infrastructure and Agro-Industries Division (AGS) of the Food and Agriculture Organization (FAO), and now affiliated with the

Federal University of Vicosa, Brazil, served as the technical coordinator cum facilitator of the workshop.

This training provided a common methodology for the conduct of five case studies focusing on national strategies and policies in the five selected AMS to promote the competitiveness of small-scale rural producers and their inclusion in regional agri-food value chains. As the final output of the training workshop, the countries submitted their draft plan of study for their respective policy research based on the template provided and to be reviewed by SEARCA.

Table 6. Commodities under ATMI-ASEAN National Studies

| Country | Focused Study |
|-----------------|---|
| Cambodia | ● Maize |
| Lao PDR | ● Maize |
| Myanmar | ● Pulses |
| Viet Nam | ● Swine |
| The Philippines | ● Swine (processed pork-based products) |

Table 6 shows the chosen priority commodities of each target AMS as decided during the project meetings and events reported in the previous progress reports. The lead researchers are shown in Table 7.

Table 7. ATMI-ASEAN National Lead Researchers

| Country | Lead Researcher | Institution/Ministry |
|----------|---------------------------|--|
| Cambodia | Mr. Prak Cheattho | GDA, MAFF, Kingdom of Cambodia |
| Lao PDR | Dr. Silinthone Sacklokham | SEAMEO Regional Centre for Community Education Development, NUoL |
| Myanmar | Dr. Zaw Oo | The Centre for Economic and Social Development (CESD) |
| Viet Nam | Dr. Tran Cong Thang | IPSARD, MARD, Viet Nam |

| | | |
|-----------------|----------------|------|
| The Philippines | Mr. Cenon Elca | UPLB |
|-----------------|----------------|------|

Table 8 shows the national-level policy studies conducted by each of the five target AMS:

Table 8. ATMI-ASEAN National-Level Policy Studies

| Country | Policy Study Title | Institution with whom SEARCA entered an MoA |
|------------------------|---|--|
| Viet Nam | Pig Value Chain Analysis in Hanoi Province – Recommendations for Inclusive Growth | Addendum to the MoA with IPSARD and to include the Center for Agricultural Policy (CAP) of IPSARD |
| Cambodia | Value Chain Analysis of Maize in Cambodia | Addendum to the MoA with MAFF-GDA |
| Myanmar | Assessing Transformation and Integration of Pulses Sector in Myanmar: Responding to Food Security and Inclusiveness | CESD |
| The Philippines | Value Chain Analysis of Selected Pork-Based Processed Products in Luzon, Philippines | College of Economics and Management Alumni Foundation, Inc. (CEMAFI) of the University of the Philippines Los Baños (UPLB) |
| Lao PDR | Analyzing Cross-Border Maize Value Chain in Xiengkhouang Province, Lao PDR | MAF-DOA subcontracted the NUoL |

1.3.2 One graduate thesis grant per year

The PSU came up with an initial list of potential thesis topics based on the priorities identified by participants during the NIWs. These identified research topics were related to the proposed national-level policy studies. A list of current MS and PhD SEARCA scholars was secured by the group from SEARCA’s Graduate Education and Institutional Development Department (GEIDD).

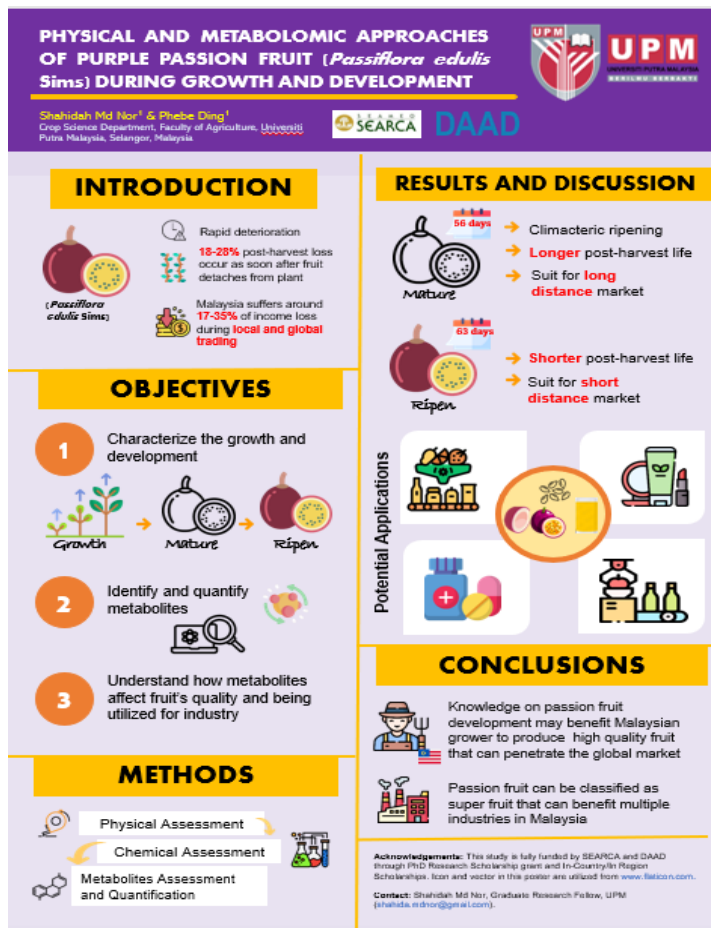
Below is a list of thesis grants and their corresponding status as of date:

Table 9. Status of Awarded Thesis Grants Aligned with ATMI Focus Themes

| Research Title | Award Period | Status as of November 2022 |
|--|------------------------------------|--|
| Economic Analysis of Supply Chain of Mud Crab in the Mekong Delta, Viet Nam <i>Awardee: Le Ngoc Danh (M), Viet Nam</i> | 2nd Semester, AY 2018–2019, (PY 3) | Graduated <i>Final tranche to be released upon submission to SEARCA of terminal documents</i> |
| Simulation Modelling of Mechanical Responses in Papaya upon Various Mechanical Loadings <i>Awardee: Nurazwin Zulkifli (M), Malaysia</i> | 1st Semester, AY 2019–2020, (PY 4) | Ongoing <ul style="list-style-type: none"> • Full grant released upon liquidation of first tranche • July 2022: Viva Voce / Defense |
| Quantification of Macronutrients and Phytochemicals in <i>Passiflora Edulis sims</i> cultivated in Malaysia <i>Awardee: Shahidah Mohd Nor (F), Malaysia</i> | 1st Semester, AY 2019–2020, (PY 4) | Graduated <ul style="list-style-type: none"> • Full grant released • Virtual presenter in the 2nd ATMI-ASEAN HLPF in Viet Nam • Awarded by SEARCA with Special Citation for Academic Achievement |
| Strategy of Ongole Grade Cattle Business Development in Central Java, Indonesia | 2nd Semester, AY 2019–2020, (PY 4) | Ongoing <ul style="list-style-type: none"> • Full grant released • Paper presented in the 1st Result |

| | | |
|--|---|--|
| <p><i>Awardee: Resistiyana Agustine (F), Indonesia</i></p> | | <p><i>Seminar on July 22, 2022</i></p> <ul style="list-style-type: none"> <i>Finalizing thesis, preparing for 2nd Result Seminar and for submission of manuscript to the Asian Journal of Agriculture and Development</i> |
| <p>Occurrence of Aflatoxin M1, Heavy Metals, and Pesticides Residues in Cow's Raw Milk in Region IV-A, Philippines</p> <p><i>Awardee: Ginas Aurea A. Villagonzalo (F), The Philippines</i></p> | <p>2nd Semester, AY 2019–2020, (PY 4)</p> | <p><i>Graduated</i></p> <p><i>Full grant released</i></p> |
| <p>Antibacterial Activity, Phytochemistry, and Toxicity Analyses of <i>Aleuritus moluccana L.</i> and its Application in Food System</p> <p><i>Awardee: Risa Nursanty (F), Indonesia</i></p> | <p>2nd Semester, AY 2019–2020, (PY 4)</p> | <p><i>Ongoing</i></p> <ul style="list-style-type: none"> <i>Full grant released</i> <i>Finalizing thesis</i> |
| <p>Persistence of Pampango Rice-Based Fermentation Traditions in the Context of the Changing Rice Landscape in the Philippines</p> <p><i>Awardee: Melanie Henson Narciso (F), The Philippines</i></p> | <p>2nd Semester, AY 2019–2020, (PY 4)</p> | <p><i>Ongoing</i></p> <ul style="list-style-type: none"> <i>Full grant released</i> <i>Dissertation defense to be scheduled in Fall 2022 semester</i> |

A total of seven thesis grants have been awarded as of PY 5. This is more than the five recipients planned before. Their respective statuses are shown in Table 9. However, due to the rationalization plan for SEARCA-funded research grants, the PhD research grants program was not offered in FY 2020–2021. SEARCA then proposed to have the ongoing and incoming food security-related theses of the SEARCA scholars and research studies funded through the IFS–SEARCA advance grants be considered as SEARCA’s co-financing to the ATMI-ASEAN project.



Ms. Shahidah Mohd Nor, one of the recipients, presented her research’s result as a poster during the ATMI-ASEAN 2nd HLPF in Viet Nam.

Figure 22. Poster of PhD Thesis Support Recipient, Ms. Shahidah Mohd Nor

1.3.3 One study on ASEAN Economic Community (SEARCA counterpart)

SEARCA entered an agreement with Dr. Jahmari of UGM for the continuation of the policy research study on Implications of AEC and Trade and Investments on Regional Food Security,

amounting to USD 10,000. However, due to COVID-19 pandemic and other unforeseen circumstances and health issues of the consultant, the preparation of the final report was delayed. A technical writer was eventually engaged to update and improve the draft report submitted by the consultant.

The report can be accessed [here](#).

1.4 Annual reviews of ASEAN multi-country cooperation initiatives to promote small-scale rural producers in relation to strategic regional agri-food value chains

IFPRI prepared a report of the annual review of ASEAN multi-country cooperation initiatives for years 1 (2017), 2 (2018), and 3 (2019). In addition, a summary report for year 4 was produced to highlight the policy changes over the years starting in 2017. They focused on the role of policies, including investment regulations, food security, and safety policies, in promoting the small-scale rural producers in strategic regional agri-food value chains.

The reports discuss the achievement of the policies adopted by the CLMVP countries to develop pro-smallholder agri-food value chains. They highlight the constraints (regulatory and capacity) and opportunities for CLMVP countries to integrate smallholders with the value chains. They also sketch out the issues where harmonization is needed between national and regional policies. The annual review offers recommendations to further promote pro-smallholder regional agri-food value chains in the ASEAN countries. Dissemination of these studies will assist the policymakers in ASEAN countries in adopting policies to promote small-scale rural producers in relation to strategic regional agri-food value chains.

IFPRI and IFAD, after consultation in February 2020, agreed to highlight the policy changes and/or updates from 2017 as a baseline report, and a summary report of years 2018, 2019, and 2020 to highlight the changes.

1.5. Study on farmers' registry, farmer organizations' resilience – Collaboration with AFA

IFPRI made a collaboration with AFA to conduct a research on farmer's registry, farmer organizations' resilience to shocks in the SEA region. The research was using field

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survey in Lao PDR, Viet Nam, and the Philippines involving 1298 respondents. Viet Nam had the highest number of respondents at 455, followed by the Philippines at 443, and Lao PDR at 400. The Philippines interviewed 80 leaders, the highest compared to 26 of Viet Nam and 20 of Lao PDR. In total, 90.29% of the respondents are members and 9.7% are leaders.

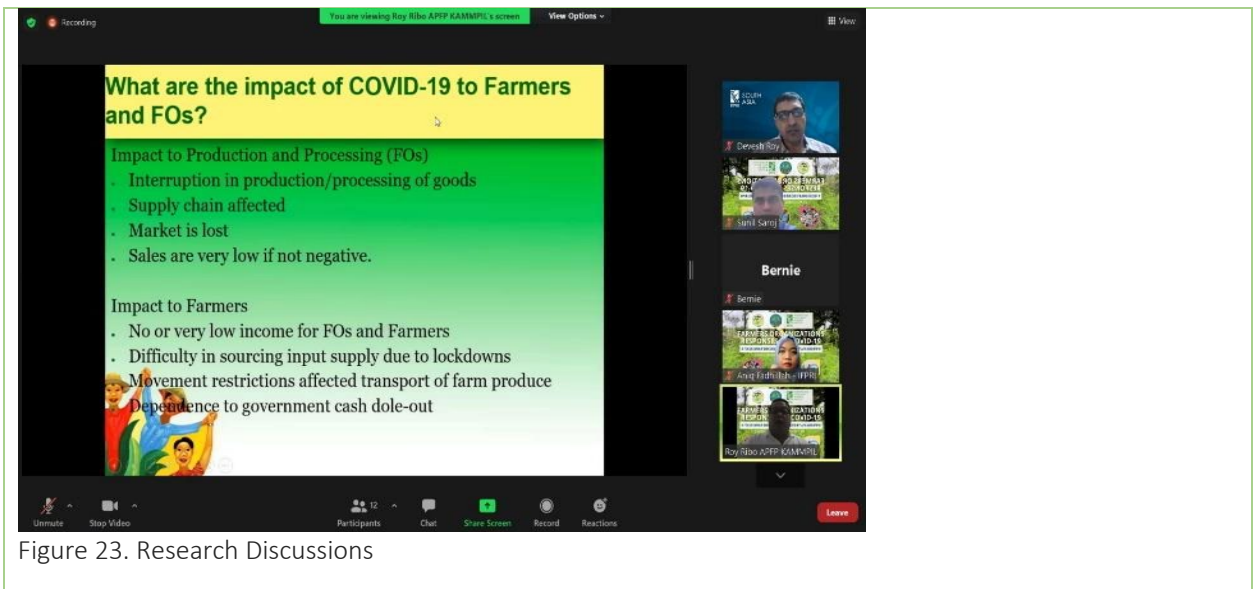


Figure 24. FO Field Survey Discussions



The survey shows, most of the organizations are organized according to commodity, although Lao PDR cited two criteria – size of landholding and capital investment by the member – as the principal criteria for membership selection. Across the three countries, 92.8% of the respondents answered not applicable when asked whether they were able to avail of government benefits – even the respondents from the Philippines where 67.8% confirmed their registration to a farm registry.

Farm registry has been put forward as an institutional system to take care of the issues related to farmers, and was discussed significantly in relation to COVID when there was a need to transfer government assistance as well as monitoring the farm performance. However, there were some revelations when asked during the survey as to how the farm registry had functioned. We went with the prior understanding that farm registry is often thought of as a government-led or public sector led system but what we found is that there is no monolith of farm registry but a whole battery, a portfolio of farm registry, where different entities are doing different jobs.

The learning was that farm registry should be looked in terms of their functionality, like what they are doing independent of their entity. They could take different shapes depending on what their functionality is: government, private, individual farmers, or associations. Farm registry is like a farmer recognition system for information about what the farmers are doing, their needs, and do the same as much as possible in real time.

There is a lot of learning from ASEAN Farmer Organizations (FOs), which have historically been engaged with lot of value addition and dealing with international markets. Even prior to the pandemic, FOs in many ASEAN countries were playing an important role in disseminating information, reducing farmer risk, and improving market reach. All of these have taken on a new significance in the post-COVID-19 world.

Not surprisingly, our findings also show that many FOs in Lao PDR are into organic certification, Philippine FOs are into self-certification, and Viet Nam FOs engage in traceable certification. For the agricultural produce, the FOs focused on exploring new markets which includes directly selling the produce to consumers, use of social media as marketing strategy, focus on food safety issues, and institutional purchase by local government for distribution as food packs to affected communities. Direct selling to consumers and district level market increased by 2 percent, despite the relative increase in average time it took to bring the produce to wholesale/district markets. Among other interventions, FOs immediately acted on the situation by providing food and seed packs to members, lobbying with agencies and partners for marketing of products, and using online platforms to market agriculture produce.

Some of the core principles that the FOs in ASEAN region primarily focused on:

- Require innovative ways of operating at different margins (most importantly look at new products, new markets, new ways of doing business like social media and digitization)
- COVID has taught the importance of non-price attributes (quality, food safety, health consideration, grading, branding, certification, health specifications)

- COVID has also taught the need to invest in the backend-cold chain, warehousing, transportation logistics. FOs need to invest while the institutions promoting or supporting them, be it the government or the donor, need to come up with capitalization in a way that can support investment that are needed in the backend.

The survey provides learning on how it is not just about setting up FOs. It is about the type of FO, their constitution, the size of the FO, their organization, including what are the selection criteria for members, issues of monitoring, skill sets, their movement up the value chain, and their composition. There has been evidence of significant heterogeneity across the three countries. In composition, heterogeneity based on gender, education, experiences, skill sets, marketing, and production among other attributes. The survey also shows a lot of transformation happening in Lao PDR, and see a lot of heterogeneity in terms of education and women's participation, among others.



Figure 25. AFA presented the preliminary result of the collaboration study on farmer's registry, farmer organizations' resilience in the SEA region

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The preliminary result was presented in the ATMI-ASEAN 2nd HLPF in Viet Nam and also at the IFAD's APR [Webinar Series](#), *Two Years into the Pandemic: Lessons and Prospects for the Recovery of Rural Economies*, in APR on Zoom on June 10, 2022.

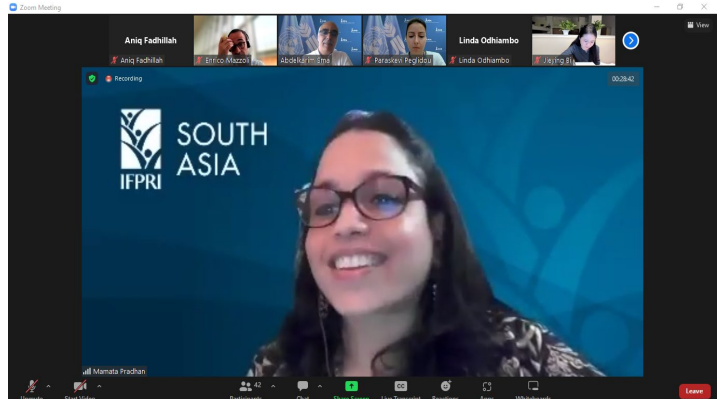


Figure 26. Dr. Mamata Pradhan Presented the Study on Farmer's Registry, Farmer Organizations' Resilience in the SEA region at the IFAD's APR Webinar Series, *Two Years into the Pandemic: Lessons and Prospects for the Recovery of Rural Economies*, in APR on Zoom on June 10, 2022

Component 2: High-level policy forum and roundtables

2.1 Organizing high-level policy forums

2.1.1 1st HLPF

IFPRI organized the 1st high-level policy forum on December 13–14, 2018, at Garden City Hotel, Phnom Penh, Cambodia. It highlighted the broad topics and issues related to agricultural transformation and market integration in the ASEAN region. The forum showed case evidence-based dialogue between the policy makers, private sector, FOs, active regional donors, and other related stakeholders. Representatives from various government agencies, research organizations, academia, farmer and civil society organizations, and the private sector of AMS attended the event.



Figure 27. The 1st ATMI-ASEAN HLPF on December 13–14, 2018, Phnom Penh, Cambodia

During the preparation, implementers interacted with the ASEAN Secretariat to engage ASEAN in the project implementation. IFPRI and SEARCA, represented by Dr. Joshi and Dr. Burgos, paid a courtesy call to the ASEAN Secretariat on March 9, 2018, to coordinate the implementation of the HLPF and other regional-level activities. As per the directions of the ASEAN Secretariat to seek approval and guidance from the ASEAN Member States, implementers represented by Dr. Joshi and Ms. Fadhillah presented the HLPF proposal

at the 39th Senior Officials Meeting of ASEAN Ministers on Agriculture and Forestry (SOM-AMAF) in Pattaya, Thailand.

To follow up on the implementation of HLPF, the implementers represented by Ms. Fadhillah paid a courtesy call on Dr. Pham Quang Minh, Head of Food, Agriculture and Forestry (FAF) Division, ASEAN Secretariat, and Mrs. Anita Permatasari, Technical Officer of FAFD, ASEAN Secretariat, on November 2, 2018. Dr. Minh requested the implementer during the call to remove the high-level from the title of HLPF and invite the Senior Officials Leaders instead of ASEAN Ministers of Agriculture and Forestry (Ministers). Implementers followed his guidance by revising the event title to Regional Policy Forum. Furthermore, the implementers engaged with the Royal kingdom of Cambodia to host the event. The MAFF of Cambodia assigned Dr. Sar Chetra, Deputy Secretary of MAFF Cambodia, to represent the country. The proceeding/summary report of the 1st HLPF or the 1st RPF appears [here](#).

2.1.2 2nd HLPF

It was decided during the 2nd RPSC meeting on November 30, 2019, in Bangkok, Thailand, that the event would initially be organized in Q4 of 2020. However, due to the COVID-19 pandemic, the 2nd HLPF was rescheduled in consultation with IFAD, SEARCA, and other projects stakeholders.



Figure 28. The 2nd ATMI-ASEAN HLPF, June 1–2, 2022, Ha Noi, Viet Nam

IFPRI organized [the 2nd high-level policy forum](#) on June 1–2, 2022, at the Pan Pacific Ha Noi, Viet Nam. It highlighted the broad topics and issues related to agricultural transformation and market integration in the ASEAN region. The forum showed case evidence-based dialogue between the policy makers, private sector, FOs, active regional donors, and other related stakeholders. Representatives from various government agencies, research organizations, academe, farmer and civil society organizations, and the private sector of AMS attended the event. It presented 34 speakers and the total participants in two days were 60 in-person and 228 virtual attendees from 17 countries. The proceeding of the 2nd HLPF appears [here](#).

2.2 Organizing roundtables aimed at developing national strategic plan of actions for the promotion of small-scale rural producers in the context of the ASEAN Common Market

2.2.1 Organize roundtables at the national level

A total of nine national-level roundtables were organized. All the policy roundtables (PRTs), except for the 2nd PRT in the Philippines, were conducted in-person. The Viet Nam PRTs were organized in Hanoi, the Myanmar PRTs in Nay Pyi Taw, 1st and 2nd Cambodia PRTs in Phnom Penh and Battambang Province, respectively, the 1st Philippines PRT in Quezon City, and the Lao PDR PRT in Xiengkhouang Province.

| | | | | |
|----------------------------|----------------------------|----------------------------|---------------------------------|------------------|
| 2 Vietnam | 2 Cambodia | 2 Myanmar | 2 Philippines | 1 Lao PDR |
| 15 Nov 2018 10 May 2019 | 11 Dec 2018 22 Jul 2019 | 20 Apr 2019 13 Aug 2019 | 2 Oct 2019 16 February 2022* | 25 May 2022 |

*Dovetailed with the Online Inception Workshop for the Development of the Philippine Processed Pork Roadmap

In the early years of the project, the Lao PDR component experienced delays in formalizing the country's engagement under the project, that is, signing the MOA with SEARCA, due to the longer than expected review process in the country. This has consequently caused delays in the implementation of activities. The pandemic, coupled with the frequent changes in the focal agency's organizational leadership, further exacerbated the situation. It was only when travel restrictions eased off in 2022 that the project was able to conduct its first PRT in the country.

2.2.2 National-level roundtable proceedings

Three PRT proceedings were published online and in print, including the 1st PRTs of Myanmar, Viet Nam, and Cambodia. These were distributed among the target countries during national-level events and were made part of exhibit displays during regional activities of the project.



Figure 29. 3 PRT Proceedings

The development and publication of the proceedings of the other PRTs were affected by the pandemic. SEARCA engaged a writer to finish the manuscripts of these PRT proceedings with existing materials. These manuscripts were then made available to the IEC Consultant engaged by SEARCA for the development of ATMI-ASEAN policy briefs for publication.

2.2.3 Participate/represent implementers in AMAF and AMAF-CSO/FO Annual Forum

During the establishment of the project proposal, there was another proposal from different IFAD projects at the ASEAN region, proposed by the AsiaDHRRRA Secretariat, proposing an establishment of the AMAF-CSO-FO Forum. This activity under the ATMI-ASEAN project was intended to support and complement the said project.

However, the proposal was not approved by AMAF. Therefore, this activity is considered dropped as no AMAF-CSO/FO Annual Forum has been organized in which implementers can participate.

Implementers continue strengthening their relationship with partners such as AFA, Grow Asia, the Organization for Economic Cooperation and Development (OECD), the ASEAN Foundation, the Swiss Agency for Development and Cooperation (SDC), and other regional partners through event participation and collaborations. The event participation aims to introduce the project and raise awareness of “Agricultural Transformation and Market Integration in the ASEAN region: Responding to food security and inclusiveness concerns.” Details of events is elaborated under the [Knowledge Management](#) section.

During the implementation, the ATMI-ASEAN coordinated closely with the ASEAN Secretariat through several courtesy calls and presented the project at the ASEAN meetings.



Figure 30. Courtesy Call to the ASEAN Secretariat (IFAD, IFPRI, SEARCA, Grow Asia, AFOSP-AFA Project)

- March 9, 2018: IFPRI, SEARCA, and IFAD had a meeting with Dr. Pham Quang Minh, Assistant Director and Head of Food, Agriculture and Forestry Division of the ASEAN Secretariat to give updates on the ATMI-ASEAN Project, and discuss regional-level activities of the project;
- August 26–27, 2018: Dr. Joshi represented the ATMI-ASEAN project to introduce the project to the AMAF at the AMAF meeting of ASEAN in Pattaya, Thailand;
- November 2, 2018: Ms. Fadhillah paid a courtesy call to the ASEAN Secretariat on Dr. Pham Quang Minh, Head of FAF Division, and Ms. Anita Permatasari, Technical Officer of FAFD, the ASEAN Secretariat, to follow up and update the ASEAN Secretariat on the 1st HLPF preparation.

Component 3: Technical assistance for planning and policy development

3.1 Technical assistance to the AMAF-CSO/FOs for the preparation of Roadmaps for the development of strategic agri-food regional value chains

3.1.1. TA in preparation of ASEAN value chain roadmaps

During the 2nd RPSC Meeting held in Bangkok, Thailand on November 30, 2019, the Project Team together with the Committee initially identified the three potential commodities of cacao, pulses, and maize for the regional road mapping activity. IFAD then requested SEARCA to prepare concept notes for the possible kick-off activities for the three roadmaps. Of the three concept notes developed, the *Regional Forum and Policy Roundtable on the ASEAN Cacao Industry*, a kick-off activity in preparation for the development of a regional roadmap for cacao in the ASEAN region, was first approved. The other two concept notes prepared were the *Review of Corn Sector SPS Issues in Cambodia and Laos for Improving National and Regional Corn Value Chains*, and the *South-South Cooperation through Farmer-to-Farmer (F2F) Knowledge and Product Exchanges in the Asian Pulses Sector*, a kick-off activity in preparation for the development of a regional roadmap for pulses in the ASEAN region.

To initiate the activities for the cacao road mapping exercise, SEARCA coordinated with the AFA, which suggested dovetailing the kick-off activity with the ASWGAC Meeting to be held in the Philippines in July 2020. However, the community quarantine in Luzon, Philippines, which initially started in March 2020, affected the preparatory activities for this meeting, which eventually forced the team to cancel the activity.

Through a series of consultations with the ASEAN Secretariat and regional partners as well as project team meetings, the project team has eventually decided to focus on the two commodities of maize and meat. These commodities were selected based on two criteria: *size of regional trade* and *importance to regional food security*, over both a short-term as well as a long-term horizon. This was also in consideration of the five target AMS' priority commodities where two focused on maize (Cambodia and Lao PDR), while another two

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focused on swine (Philippines and Viet Nam). Dr. Roehlano M. Briones, Senior Research Fellow, PIDS, was engaged as the Lead Expert of the regional road mapping exercise. National experts from the five target AMS were also engaged to provide country-level analyses on the maize–meat value chain.

The ***Technical Report of the Maize–Meat Regional Value Chain Assessment*** was submitted to ASEAN on August 9, 2022, after addressing the feedback received from AMS. The report was shared to the AMS during the Special SOM of the 43rd AMAF held on August 23, 2022. ASEC has informed SEARCA that there was no additional feedback from the AMS and that the report will be submitted to the 44th AMAF for notation on October 26, 2022.

The report can be accessed [here](#).

3.1.2. Three relevant learning events (with in-kind contribution from SEARCA)

The learning event was previously committed under Component 2.2. and was later merged with these two relevant learning events.

Workshop on Rapid Value Chain Assessment

The training workshop organized on Rapid Value Chain Assessment was facilitated by Dr. Carlos A da Silva in Bangkok, Thailand, from November 1–3, 2017. This workshop aimed to provide a common research methodology for conducting national level policy studies and to improve the capacity of the participants in conducting rapid appraisals of agri-food systems to identify possible areas for value chain performance improvement.



Figure 31. Training Workshop on Rapid Value Chain Assessment in Bangkok, Thailand, from November 1–3, 2017

The report can be accessed [here](#).

Workshop on Communicating Research with Policy Makers and Policy Proposal Development on Inclusive Agricultural Value Chains

SEARCA, led by KMD-Training Unit (TU), as part of its commitment to the ATMI-ASEAN project, organized training on Communicating Research with Policy Makers and Policy Proposal Development on Inclusive Agricultural Value Chains from February 25 to March 1, 2019, at SEARCA's Headquarter in Los Baños, the Philippines.



SEARCA organizes back-to-back workshops on communicating research and policy proposal development on inclusive agricultural value chains

Figure 32. Training on Communicating Research with Policy Makers and Policy Proposal Development on Inclusive Agricultural Value Chains from February 25 to March 1, 2019, at SEARCA’s Headquarter in Los Baños, the Philippines

The report can be accessed [here](#).

Regional Event on Understanding the Fundamentals of Halal Towards Food Security in the ASEAN Region
The SEARCA-funded activity “Regional Event on Understanding the Fundamentals of Halal Towards Food Security in the ASEAN Region” was held on April 8–11, 2019, in Putrajaya, Malaysia.

Regional Workshop cum Roundtable Discussion on ASEAN Economic Integration
Regional Workshop cum Roundtable Discussion on ASEAN Economic Integration from November 28–29, 2019, in Bangkok, Thailand.

3.1.3 Technical assistance to ASEAN Roadmap for Enhancing the Role of Agriculture Cooperative 2018–2025

The ATMI-ASEAN was invited by ASWGAC, ACEDAC, the ASEAN Foundation, and AFA to attend the ASEAN Roadmap Workshop to enhance the role of Agricultural Cooperatives in the Agricultural Global Value Chain from February 27–28, 2019, in Bangkok, Thailand. The ACEDAC and ASWGAC requested contributions from the ATMI-

ASEAN project, other CSOs, and international organizations on the implementation of the adopted ASEAN Roadmap for Enhancing the Role of Agriculture Cooperative 2018–2025. There are two activities which can be synergized with project activities among list of proposed action plans, among others, under pillar: institutional and capacity development, to improve access to good quality advisory services by organizing trainings for government officials on the management and operator of agricultural cooperatives; and pillar: competitiveness, to create enabling environment for agri-coop in ASEAN region through policy dialogue on drafting guideline for the consolidation of small agri-coop and legal framework.

The ATMI-ASEAN expressed interest in supporting the activities of government officials on the management and operation of agricultural cooperatives, which involves apex farmer organizations, AFA, ASWGs, and ATMI's researcher, and to invite ASWGAC and ACEDAC members to the ATMI-ASEAN's 2nd HLPF. AFA has agreed to co-organize the workshop by supporting the participation of FOs' representatives. However, further discussion among stakeholders is needed to support the program's implementation, in which IFPRI has decided not to lead the support for this activity.

It was decided during the 2nd RPSC meeting that the ATMI–ASEAN project will try to find a way to collaborate with ASWGAC in implementing the regional road mapping exercise on cacao. However, the planned ASWGAC meeting in the Philippines in July 2020 was postponed due to the COVID-19 pandemic. AFA, SEARCA's primary contact in relation to this meeting, said they would inform SEARCA once a new schedule is made. Therefore, implementers proceeded with the regional roadmap plan having different commodities as suggested by the ASEAN Secretariat. The regional roadmap exercise focuses on maize–meat commodities and working with the ASEAN Technical Working Group (ATWG) on Crops and Livestock and Agricultural Research and Development (ATWGARD).

3.2 Technical assistance to the AMS and national platforms under the AMAF-CSO/FOs Annual Forum for the Preparation of National Strategic Plans of Action

3.2.1 *TA to targeted AMS and national platforms under the AMAF-CSO/FO Annual Forum to prepare 5 N-SPAs (5 packages of TA provided)*

Dr. Briones was also engaged by SEARCA as the Lead Technical Consultant for the National Road Mapping Exercise under this component. The specific objectives of the exercise through the lead technical consultant were as follows:

- To review the five value chain studies upon their completion, and utilize the studies as building blocks for the development of the national roadmaps
- To develop the overall framework and common methodology to be used for the national road mapping activity of the five ATMI targeted AMS (that is, CLMV-P)
- To conceptualize and facilitate the training workshop on roadmap development for selected members of the national road mapping teams
- To identify potential in-country consultants or focal points in each road mapping team in consultation with project implementers and partners
- To guide, monitor, and coordinate all activities related to the national road mapping exercise (including stakeholders consultation / validation workshops) with SEARCA
- To review and endorse national roadmaps for approval of project implementers and ATMI focal agencies

The national roadmaps, upon review and approval of project implementers and ATMI focal agencies, will be endorsed to the AMS governments for their consideration.

Framework

The framework adopts the principles of results-based planning and stakeholder participation. The proposed contents of the roadmaps will be as follows:

- i) Executive Summary
- ii) Part One: Where are we now?
 - Description of the value chain
 - Key constraints
 - SWOT (strengths, weaknesses, opportunities, and threats) analysis
- iii) Part 2: Where do we want to go?
 - Vision and Objectives
 - Key result areas and performance indicators
- iv) Part 3: How will we get there?

- Defining strategies based on SWOT
- Action programs and timetables

Methodology

1. SEARCA, with the support of the lead technical consultant and in consultation with the NPSCs, identified the lead government agency, that is, the national focal agencies (**Table 10**), to guide the preparation of the national roadmap. The national roadmap teams, in coordination with the focal agencies and with guidance from the Lead Technical Consultant and SEARCA, developed an exhaustive list of stakeholders meant to represent the general interests across the main segments of the targeted value chain.
2. Drafting of a national roadmap was undertaken by a national roadmap team, engaged by ATMI-ASEAN with guidance from the Lead Technical Consultant and NPSCs.
 - a. The team was composed of an **agribusiness value chain expert** (based in an academic/research institution), a **commodity expert**, and an **industry expert** (served as the team’s private sector representative who worked with or was from a relevant industry association).
 - b. The agribusiness value chain expert because of its role as the national roadmap team leader and country coordinator also served as lead author in all reports, with inputs from the other team members.

Table 10. National Roadmap Teams

| Country | Lead Agency & Focal Person/s | Agribusiness Value Chain Expert | Commodity Expert | Industry Expert |
|-------------|--|----------------------------------|-----------------------------------|-----------------------|
| Cambodia | <u>MAFF-GDA</u> Mr. Cheattho Prak Mr. Vichet Sorn | Mr. Ratha Chan | Mr. Soy Kosal | Mr. San Pisey |
| Myanmar | <u>MoALI</u> U Kyaw Swe Lin Dr. Thanda Kyi Dr. Khin Mar Lay | Dr. Tin Htut | U Myo Thu | U Soe Win Maung |
| Philippines | <u>DA – National Livestock Program</u> Dr. Ruth Micalat-Sonaco | Asst. Prof. Jewel Joanna Cabardo | Asst. Prof. Nohreen Ethel Manipol | Ms. Lailani McDonough |

3. The national teams underwent a training workshop on roadmap preparation. Both batches of the training workshop were conducted online via MS Teams due to the limitations brought by COVID-19 pandemic. The Lead Technical Consultant prepared training materials for the purpose and served as a resource person.
4. The NPSCs in the five countries convened a series of multi-stakeholder workshops to implement the participatory approach. The workshop participants came from the list of stakeholders and included the private sector, FOs, government, and donor agencies as identified in the value chain studies or as recommended by the national teams.
5. The consultation workshops were provided as technical assistance by the national roadmap team together with the Lead Technical Consultant, who attended as a supplementary resource person, particularly in the Philippines workshops. The national roadmap team provided the following:
 - a. Proposed list of participants
 - b. Prospectus for the workshop describing the state of the value chain, the need for a value chain roadmap, the aims and scope of the workshop, and the workshop program
 - c. Their services as workshop resource persons and facilitators
6. Upon completion of the national stakeholders' workshop, the national roadmap team developed the workshop discussions and materials into a coherent document stating the national roadmap for the relevant value chain.

C. Statement of Expenditure

(The same will be submitted separately)

Implementers certify that the below amounts have been expended for eligible expenditures for the proper execution of the project in accordance with the terms and conditions of the Grant Agreement.

Table 11. Annual and Semi-Annual Budget by Expenditure Category for 2021–22

(In USD)

| Category of Expenditure | Budget (Year 6) | Actual (Year 6) | Projected (Year 6) |
|---|---------------------------------------|---------------------------------------|---------------------------------------|
| | July 1, 2021, to November 30, 2021 | July 1, 2021, to November 30, 2021 | December 1, 2021, to June 30, 2022 |
| Consultancies and research | | | |
| Equipment and office space | | | |
| Salaries and allowances | | | |
| Workshops/policy roundtable | | | |
| Training | | | |
| Travel cost | | | |
| Sub-total direct costs | | | |
| Overheads | | | |
| CGIAR Trust Fund cost — 2 percent sharing | | | |
| Total | | | |

D. Relevance to IFAD Target Group

IFAD's mandate defines its "target group" as rural people living in poverty and experiencing food insecurity in developing countries. Within this broad group, IFAD targets extremely poor people with the potential to take advantage of improved access to assets and opportunities for agricultural production, markets, and rural income-generating activities.

This project focuses on promoting the role of small-scale rural producers in agri-food market integration and the transformation of agri-food systems in SEA. Hence, the criteria for selecting the priority commodities for the value chain studies were formulated by carefully considering the needs of these groups. The proposed set of criteria was as follows:

1. Bigger impact on smallholders in terms of benefits
 - Improve rural livelihood
 - Job opportunities
 - Overcome market shocks
2. Has export opportunity or potential in the region
3. Has a comparative advantage
4. Has the potential for foreign direct investments

The targeted AMS identified the following agricultural value chains for their national-level policy studies during the focal points and researchers meeting and training workshop on rapid value chain assessment held in Bangkok, Thailand:

- Cambodia — maize
- Lao PDR — maize
- Myanmar — pulses
- Viet Nam — swine
- The Philippines — swine (processed)

These policy studies, some of which are complete and appear in the annexures, have the following common objectives:

- Strengthen national-level agricultural value chains
- Inclusion of smallholders in the value chains
- Develop public policy/support policymakers
- Provide policy recommendations to increase competitiveness and growth

Following these studies, implementers support the national teams to develop national roadmaps to strengthen the commodity value chains in their respective countries. These activities are in line with the project's goal of strengthening public policy in support of small-scale rural producers.

Similarly, research studies undertaken by IFPRI under component 1.2 highlighted opportunities for each targeted country to adjust its policies related to agricultural growth, modernization, and trade potential that will benefit smallholder farmers in the region. Moreover, IFPRI's annual review reports of the ASEAN multi-country cooperation initiatives under component 1.4 examine national and regional policies, as well as regulatory and capacity constraints in developing competitive regional agri-food industries that benefit small-scale rural producers. They discuss the incongruence between national and regional policies and regulations and identifies means to address them. These reports are prepared to support the policymakers in adopting pro-poor policies to improve the livelihoods of the smallholders.

IFPRI and SEARCA aim to strengthen pro-poor policymaking in agriculture and food supply through policy studies and knowledge management, benefiting the rural poor.

E. Gender Focus

One of IFAD's key elements in reducing rural poverty and improving food security is promoting gender equality. It means a state of equal ease of access to resources and opportunities regardless of gender, including economic participation and decision-making, and the state of valuing different behaviors, aspirations, and needs equally. The project ensures easy access to resources and opportunities for both men and women. Families, communities, and countries can be benefited when women are empowered. The condition can be achieved when there is a change at a household level involving all members.

Studies conducted by IFPRI and SEARCA under components 1.2 and 1.3 include a component focusing on gender issues. These studies are "[Micro-analyses of smallholder participations in agricultural transformation and market integration in Southeast Asia](#)" and "[Value Chain Analysis of Selected Pork-based Processed Products in Luzon, Philippines](#)."

Dissemination of implementers' studies will assist the policymakers in ASEAN countries in adopting policies to promote the competitiveness of small-scale rural producers and improve the food security of rural men and women.

The implementers acknowledged gender equality among participants during the project implementation by observing the female participation numbers in the organized workshops, forums, meetings, and other programs. Information about country-wise female participation in all activities was reported in the previous progress reports submitted to IFAD.

It was observed that more than one-third of the participants in the national inception workshops and the rapid value chain assessment workshop were female. Participants were also distributed equally between males and females in Myanmar. However, female participation continues to be low in Cambodia and Viet Nam.

Overall female participation in NPSC meetings was 42 percent. The overall female participation distribution at the RPSC meetings was 49 percent. In the two online training workshops conducted on National Roadmap Development, a total of 41 percent from the five target AMS were female participants, with Myanmar and Viet Nam having slightly higher female participation rates (Table 11).

Table 12. Participants of the 2021 Training Workshop on National Roadmap Development

| Country | Female | Male |
|---------------------------------|---------------|-------------|
| <i>Batch 1: Myanmar</i> | 5 | 4 |
| <i>Batch 1: The Philippines</i> | 8 | 13 |
| <i>Batch 2: Cambodia</i> | 1 | 4 |
| <i>Batch 2: Lao PDR</i> | 3 | 5 |
| <i>Batch 2: Viet Nam</i> | 2 | 1 |
| TOTAL | 19 | 27 |

The implementers encouraged higher participation of women in cooperation with the respective focal agencies for the success of policy forums and roundtables.

Mainstreaming Gender Equality Webinar

On January 21, 2022, the ATMI-ASEAN project partnered with the IFAD Philippines Gender Network (IPGN) and conducted the online Regional Forum on Mainstreaming Gender Equality towards an Inclusive and Sustainable Post COVID-19 Regional Recovery via Zoom. The forum generally aimed to provide a venue to share and discuss gender mainstreaming initiatives in the ASEAN region and come up with recommendations on how these could complement and support the implementation of the ASEAN Comprehensive Recovery Framework (ACRF). Over 190 people from the region and beyond attended the event. The forum was also featured in the January 2022 Issue of the IFAD APR Newsletter.

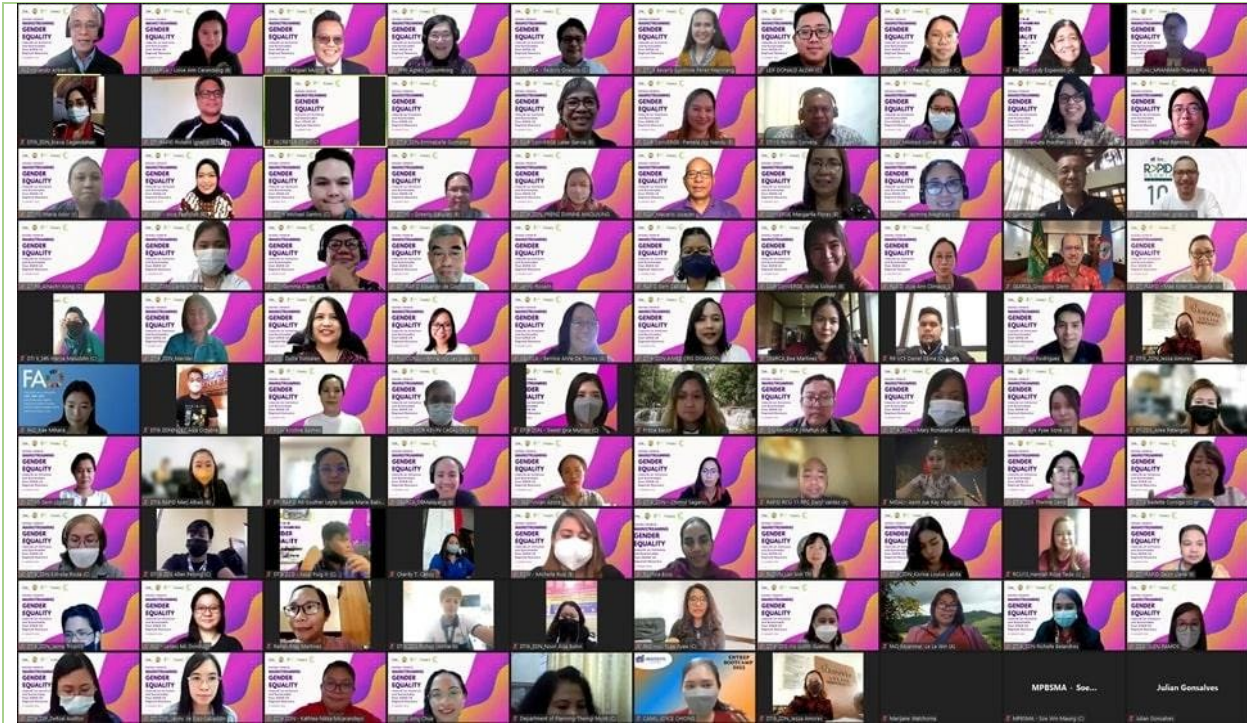


Figure 33. Mainstreaming Gender Equality Webinar, Virtual

Implementers believe that females must be encouraged to participate in these policy forums, policy studies, and other project activities. Women are known to play a significant role in agriculture across countries, and their ideas and perspectives also need to be considered. IFPRI is pleased that 71 percent of females were selected to receive thesis grants in the ongoing SEARCA-PhD research grants program.

F. Environment and Climate Focus

Climate change is one of the major challenges faced by the agriculture sector in the region. Therefore, reducing vulnerability to climate change is consistently part of the agenda of all the countries involved in the project. The use of modern technologies and machines, promoting “green” agriculture, and organic farming are some of the action plans identified during the national inception workshops. Further, under sub-component 1.2, an IFPRI discussion paper titled “[Transformation and Sources of Growth in Southeast Asian Agriculture](#)” focuses on the environmental aspect and highlights the contribution of “land area expansion” to the agricultural growth in Southeast Asian countries.

Some major findings with important implications for the future growth of agriculture in the region are:

- A considerable proportion of the output growth has come from area expansion — clearing forests, bringing marginal land under cultivation, and raising cropping intensity. While the supply of land is fixed, the competition for land has become intense due to its increasing demand for non-agricultural activities. Deforestation is not desirable from the perspective of ecosystem services. Hence, area-driven growth is unlikely to sustain in the long run. The recourse, therefore, should be with raising cropping intensity and at the same time maintaining the health of natural resources like land and water
- To boost agricultural growth, the recourse should be with technological change and crop diversification to favor high-value crops. However, while the contribution of technological change to output growth is small in high-income countries, its effect has started diminishing in low-income countries, which is a matter of concern. The small contribution of technologies or deceleration in their gains could be on account of inadequate agricultural research investment, agricultural research inefficiency, poor linkages between research and extension systems, and lack of investment in agri-infrastructure essential to harness the potential gains from investment in agricultural research. All these have implications for agricultural research and development

- The agricultural research investment is far from adequate in most countries in the SEA region. It needs to be enhanced to increase the yield frontiers and reduce the production cost for agriculture's efficient and sustainable growth. The agricultural research agenda needs to be revisited and prioritized, keeping in view the emerging challenges of climate change, rising prices of agricultural commodities and energy inputs, increasing cost of production, labor shortages, degradation of natural resources, and changing demand patterns. Although agricultural research is likely to focus on breeding for higher yields ostensibly for food security, the significance of research for the management of biotic and abiotic stresses cannot be overemphasized. Research on horticultural crops merits special attention, which has realized fewer yield gains. Finally, to benefit from the research investment, there is a need to invest in information systems and complementary infrastructures such as irrigation and electricity.

G. Nutrition Focus

The “[Overview of the agricultural modernization in Southeast Asia](#),” a study under sub-component 1.2, shows that agriculture production within the SEA region has continued to account for significant sources of calories and proteins, which is similar to the South Asia (SA) region. Production diversification has, therefore, closely matched consumption diversification, with declining shares of rice and rising shares of meat, including pig meat and fish, as well as increased maize production as feedstuff, although the growth of vegetable and milk production has remained much lower compared to SA. Increased meat production has contributed to considerable growth of the per capita availability of protein since the 1980s, which has still been slower than in East Asia but faster than in SA. Trade, in the meantime, has contributed to a significant shift toward vegetable oils (primarily palm oil) production. Agricultural modernization has also been associated with overall improvements in nutritional outcomes, including reduced child stunting and anemia in women and children.

The study “[Transformation and Sources of Growth in Southeast Asian Agriculture](#),” under sub-component 1.2, highlights that the structural transformation has led to improved labor productivity in agriculture, which has impacted poverty and nutritional status in the region. In Viet Nam, for instance, the head-count poverty fell drastically from 52.9 percent in 1991 to 2 percent in 2016, and the proportion of the undernourished population from 45.6 percent to 11 percent. Indonesia also witnessed a significant fall in the head-count poverty by 20 percentage points and in the share of undernourished population by 12 percentage points. The incidence of poverty and undernourishment, however, remains high in Lao PDR despite the rapid economic as well as agricultural growth. Further, this study mentions international trade, changing food preferences, and cropping patterns of high-value, nutrient-rich crops such as fruits, vegetables, and pulses in Southeast Asian countries.

Other studies related to the theme of market integration, under sub-component 1.2, “[Assessing agricultural market integration of Cambodia within and beyond ASEAN](#)” and “[Market Integration with ASEAN and Beyond: The case of Myanmar](#),” focuses on the export potential of top agricultural commodities of Cambodia and Myanmar. These commodities

include some high-value nutritional food such as crustaceans, bovine meat, fish, fruits, and pulses.

The national-level studies under sub-component 1.3 focus on commodities such as pulses and processed pork. The "[Assessing Transformation and Integration of Pulses Sector in Myanmar: Value Chain Study of Pulses Exporting to India](#)" study highlights that the global market for pulses has been expanding steadily for several decades in terms of quantity and value. The demand for pulses in India is gradually increasing with its growing population, as pulses are the main source of protein and are consumed by more than 50 percent of the Indian population. Further, the consumers in many wealthy countries (for example, Japan, Taiwan, and South Korea) seek to consume more vegetable protein as a part of their healthy diet to reduce cardiovascular diseases. There is increasing demand even in poorer countries for processed pulse products to substitute the increasingly costly meat protein sources.

Pork is the main source of protein in the Filipino diet. The IFPRI national study on "[Value Chain Analysis of Selected Pork-based Processed Products in Luzon, Philippines](#)" focuses on the issues related to smallholder participation, investment requirements, and competitiveness to strengthen the processed pork products' value chain in the Philippines.

H. Youth Focus

Field interviews conducted in [“Value Chain Analysis of Selected Pork-based Processed Products in Luzon, Philippines”](#) indicate that yellow corn farmers, age 50 or more, struggle to find workers for farming. Hence, they train out-of-school youth to work with them on the farms. This training includes skills in using the tractor, preparing the land, and harvesting-related activities which will help the youth be employed in the agriculture sector in the future. Some assistance provided by the provincial agriculture office there are (a) Integrated Pest Management Farmer Field School (IPMFFS) training held four months per year; (b) one day lecture on good agricultural practice (GAP); (c) seed and fertilizer subsidies; (d) free tractors, tube well, and water pumps; and (e) free soil analysis.

Our national-level studies in Cambodia, Myanmar, Viet Nam, and the Philippines highlight the constraints to developing the value chains related to pulses, maize, and livestock such as the pig. These constraints also inflict persisting challenges for youth participation in the value chains. Some of these challenges include limited access to finance, inadequate infrastructure, limited technical knowledge, and limited interaction among value chain stakeholders. The interaction between farm households, agri-food market, and employment of household members, including youth, were discussed in the study [“Micro-analyses of smallholder participations in agricultural transformation and market integration in Southeast Asia”](#) conducted in Viet Nam.

IFPRI’s researchers and Dr. Fabrizio from IFAD wrote a blog on “Farmer Organizations and COVID-19 in ASEAN: Role, impact, and opportunities,” highlighting the crucial role of FOs in buffering against and recovering from the economic shocks that will follow the COVID-19 pandemic. The blog states that in several ASEAN countries, the system of agripreneurs is an important innovation that, along with FOs, has drawn young people into agri-entrepreneurship, bringing non-price attributes like value addition and food safety practices into focus. In Myanmar, for instance, the Rakhawanna Yuwa Association provides training to young farmers on organic farming and permaculture. Further, some FOs and programs use social media as an active platform for advertising, promoting, and selling their produce. In some countries, governments have rolled out initiatives and are promoting start-ups for

digitally linking farmers to investors and consumers. Such innovations have helped FOs develop market and trade-focused skills, with farmers acquiring an entrepreneurial edge and experience in direct sales and food safety practices.

I. Knowledge Sharing and Management

The ATMI-ASEAN project produces resources and/or activities that are shared through different available means to address key concerns of ASEAN countries related to food security and smallholder inclusiveness and to strengthen the capacity of decision-makers to design policies and plans to promote the role of SSRPs in agri-food value chains.

Project Microsite

Implementers, IFPRI, and SEARCA established microsites for the ATMI-ASEAN project to disseminate information about the project. The link to the ATMI-ASEAN microsites are [The ATMI-ASEAN](#) project microsite under IFPRI Global website and the [SEARCA website](#).



Figure 34. The ATMI-ASEAN Microsite on IFPRI's Global Website



Figure 35. The ATMI-ASEAN Microsite at the SEARCA's Website

Information dissemination

All the presentations and reading materials used in the course of the inception workshops, policy forums, and roundtables were shared with the stakeholders. In addition, IFPRI and SEARCA have also disseminated some of the earlier studies targeting the selected AMS. Once studies are completed, their dissemination will be done through policy briefs, media briefs, op-eds, blogs, project reports, and high-level policy dialogues.

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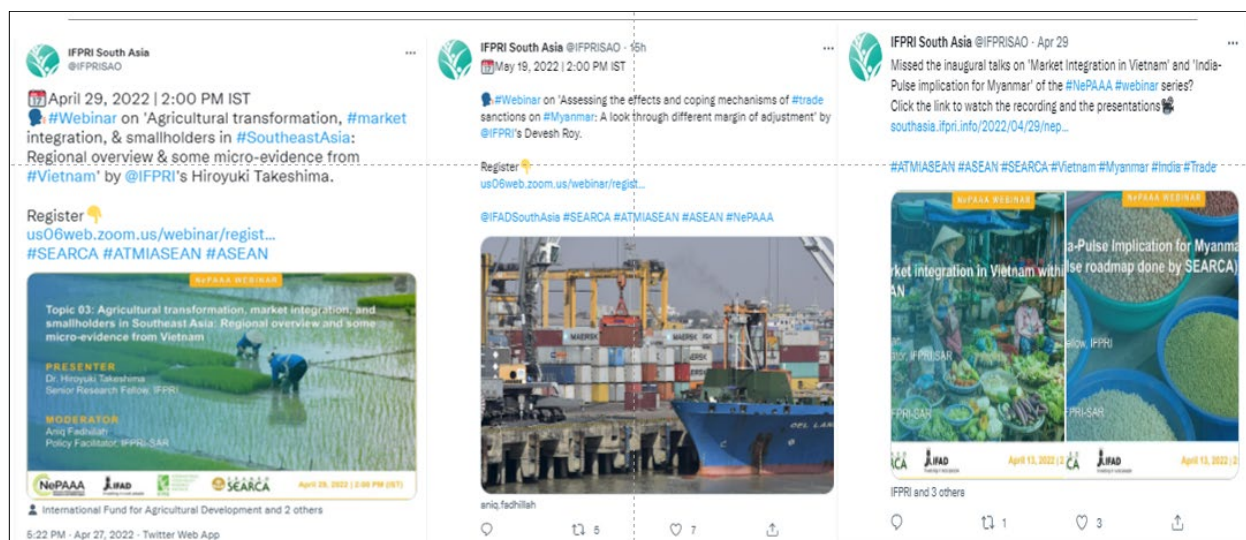


Figure 36. Information Dissemination on Social Media

Dissemination of some of the knowledge resources include:

- ✓ Pre- and post-event news articles posted on [SEARCA website](#)
- ✓ [The ATMI–ASEAN](#) project microsite under IFPRI Global website
- ✓ [The ATMI–ASEAN](#) project microsite under the SEARCA website
- ✓ Dissemination of IFPRI’s discussion papers under ATMI–ASEAN project to stakeholders
- ✓ Listing of IFPRI studies at [Grow Asia Exchange](#)

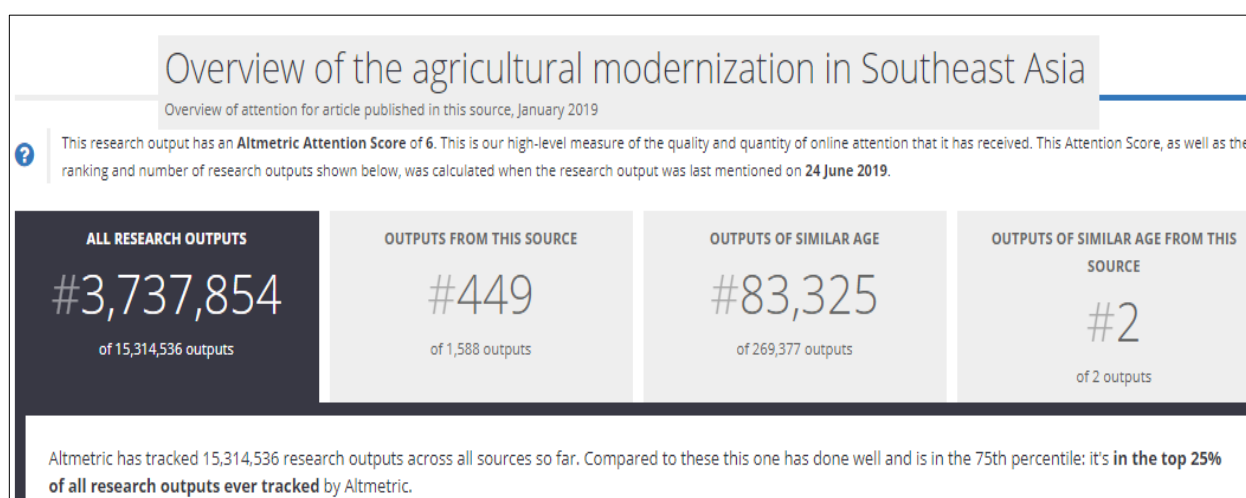


Figure 37. Altmetric Score

Project presentations

Implementers presented during this reporting period from July 2021 to November 2021 in the following:

2018:

- ✓ IFPRI and SEARCA had a meeting with Dr. Pham Quang Minh, Assistant Director and Head of FAFD of the ASEAN Secretariat to give updates on the ATMI-ASEAN Project and discuss regional-level activities of the project on March 9, 2018
- ✓ Dr. Joshi represented implementers in AMAF meeting of ASEAN in Pattaya, Thailand on August 26–27, 2018
- ✓ Ms. Fadhillah paid a courtesy call to the ASEAN Secretariat on Dr. Pham Quang Minh, Head of FAFD and Mrs. Anita Permatasari, Technical Officer of FAFD, the ASEAN Secretariat, to follow up and updated the ASEAN Secretariat on the 1st HLPF preparation on November 2, 2018
- ✓ Ms. Fadhillah represented the ATMI-ASEAN as workshop facilitator in the ASEAN Exchange Visit on Strengthening the Role of Agricultural Cooperatives in the Coconut value Chain Management and Job Creations in Rural Areas organized as a collaboration of the ACEDAC under the ASWGAC with the ASEAN Foundation through the ASEAN Farmers' Organisation Support Programme (AFOSP) project, AFA, and La Via Campesina (LVC) as part of the Medium Term Cooperation Program Phase 2 (MTCP 2) Project activity in Purworejo and Yogyakarta, Indonesia on October 24–25, 2018

2020:

- ✓ meeting with AFA to discuss the regional event in Cacao on January 24, 2020

2021:

- ✓ The Philippines Partnership for Sustainable Agriculture (PPSA)'s General Assembly 2021 on From Collaborations to Value Co-Creations: Pathways to Helping Smallholder Farmers and Fishers on November 18, 2021

Event participation

Implementers participated during this reporting period from July 2021 to November 2021 in the following:

2018:

- ✓ the 9th IFAD Annual Country Programme Review (ACPOR)
- ✓ the 1st IPGN General Assembly on May 22–25, 2018
- ✓ presented a result study under the ATMI-ASEAN project entitled “Market Integration in ASEAN: A comparative study of Myanmar and Viet Nam” at the IFAD Mekong Hub Knowledge and Learning Fair (MKLF) on “Inclusive and resilient Smallholder Agricultural Transformation in the Mekong Cluster” in Danang, Viet Nam on July 4–6, 2018
- ✓ the Practitioners’ Workshop and Learning Event organized by the PPSA under Grow Asia activity in Manila, the Philippines on August 1, 2018
- ✓ the Grow Asia Learning Alliance (GALA) Workshop to strengthen partnership and network with other IFAD-funded projects in the Philippines as well as the private sector in May 2018 and November 2018
- ✓ the IFAD’s Regional Workshop on Inclusive and Sustainable Rural Transformation: IFAD’s priorities in the Asia Pacific Region for 2019–21 in Yogyakarta, Indonesia on October 18–19, 2018
- ✓ the OECD–ASEAN Regional Outreach event: Making Agro-food Markets Work for ASEAN in Ha Noi, Viet Nam on November 5–6, 2018

2019:

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- ✓ the 2nd IFAD MKLF plenary sessions and exhibition on July 10–11, 2019, in Bangkok, Thailand
- ✓ the ASEAN guideline and action plan on responsible investment in Food, Agriculture and Forestry: workshop on operationalizing the action plan organized by the ASEAN Secretariat, the FAO, Grow Asia, the International Institute for Sustainable Development (IISD), and SDC on July 30–31, 2019, in Bangkok, Thailand
- ✓ the second regional workshop on developing the action plan of ASEAN Roadmap organized by ASWGAC, ACEDAC, ASEAN Foundation, and ASEAN Secretariat on September 25, 2019, in the ASEAN Secretariat office, Jakarta, Indonesia
- ✓ the IFAD Philippines Knowledge Market and Policy Engagement (KLMPE) Conference on November 13–14, 2019, in Quezon City, the Philippines
- ✓ supported Grow Asia and PPSA in organizing the training on Navigating Business Partnerships on November 4–5, 2019, at the SEARCA Headquarters

2020:

- ✓ the IFAD Philippines' 12th Annual Country Program Review (ACPoR) from February 3–6, 2020, in Davao City, the Philippines
- ✓ Grow Asia's webinar on Smallholder AgriTech – Southeast Asia Landscape 2020 on April 21, 2020
- ✓ the Value Chain Capacity Building Network's webinar on the impact of the Covid-19 pandemic on agricultural value chains – What we can do to mitigate the impact on April 22, 2020
- ✓ Grow Asia's webinar GALA on Value on April 23, 2020
- ✓ FIA-McKinsey's webinar on Impact of COVID-19 on the Agri-food Sector in Asia on April 27, 2020
- ✓ SEARCA's webinar: SOLVE on Food Security in the time of COVID-19 Pandemic on April 28, 2020

2021:

- ✓ AFA's event on Consolidating Family Farmers Voices on Food Systems Summit on 11 July 11, 2021
- ✓ the IFAD MKLF on "Inclusive and resilient Smallholder Agricultural Transformation in the Mekong Cluster" in Danang, Viet Nam on July 4–6, 2018
- ✓ Grow Asia's event on Grow Asia Directory Showcase: Info Session on July 7, 2021
- ✓ AFA's event on Global Food Systems Summit Independent Dialogue of Farmers' Organizations on July 8–9, 2021
- ✓ [13th IFAD Philippines ACPOR](#) on July 22–23, 2021, via Zoom
- ✓ PPSA's event on the Partnership and Sustainable Development for the Coffee Sector in Viet Nam, Indonesia, and Philippines on September 7, 2021
- ✓ Grow Asia's event on GrowHer Launch Indonesia on September 15, 2021
- ✓ ERIA's event on *Entrepreneurship, Start-ups, Innovation (E-S-I) in ASEAN and East Asia for The Post-Pandemic Recovery Webinar Series – Episode 8* in E-Commerce on September 23, 2021
- ✓ AFA's event on Agriculture Resilient to Pandemic's Impact: Transforming Food Systems to Reduce Food Loss and Waste on September 28, 2021
- ✓ the Sustainable Agriculture Forum (SAF) 2018 organized by European Chamber of Commerce of the Philippines (ECCP) on October 2, 2018, in Manila, the Philippines
- ✓ Grow Asia's event on Grow Asia DLS 2021: Action-led Research for Smallholder Farming in Southeast Asia on October 6, 2021
- ✓ Croplife Asia's event on Spotlight on Rural Women in Agriculture for International Day of Rural Women 2021 on October 13, 2021

J. Scaling Up

In year 3, implementers engaged with more stakeholders, and not only with other IFAD projects but also with the ASEAN sectoral working groups, ASEAN networks, and the ASEAN Foundation.

Implementers organized the ATMI–ASEAN’s 1st RPF/HLPF, which was acknowledged by the 39th SOM-AMAF. The forum showcased evidence-based empirical policy analysis to foster a cooperative environment among member states and facilitate the alignment and engagement of all relevant stakeholders from governments, civil society, research and academia, farmers’ associations, and the private sector. The participants, who attended the forum, were invited to join NePAAA.

NePAAA aims to sustain project work over the long run on a broader scale and intends to provide evidence-based policy options and recommendations to AMAF and other regional stakeholders. It is expected to become a platform for policy advocacy, which consolidates the policy dialogue at the national and regional level through substantive amounts of analytical work and TA provided by the implementers under the project.

Additionally, plans to constitute NePAAA were discussed in years 4 and 5 during the 2nd and the 3rd RPSC meetings. The meetings suggested tapping the existing research network in the ASEAN region and replicating the Regional Strategic Analysis and Knowledge Support System (ReSAKSS) Asia, a well-proven successful network facilitated by IFPRI.

The implementers undertook activities under components 1, 2, and 3 to strengthen the capacity of the decision-makers to design action plans that will support the achievement of this program’s objectives and facilitate its scaling up. Implementers also supported the development of the ASEAN network of policymakers that will use the project’s achievements as input for further strengthening policy actions at the ASEAN level on food security and smallholder agriculture.

K. Overall Progress: Strengths and Weaknesses

IFPRI and SEARCA effectively coordinated and executed their respective activities since the beginning of the project to benefit the small-scale rural producers in Southeast Asia. The work was organized based on comparative advantage in research as well as advocacy. Implementers still faced some challenges while executing certain activities.

IFPRI and SEARCA constituted PCU and PSU after the project launch workshop, facilitating the successful organization of all five NIWs, training workshops, and PRTs in the selected AMS. These workshops facilitated developing a common understanding of the project's objectives among the partner institutions and implementers. They also facilitated strengthening policymakers' capacity in the ASEAN region.

The dialogues in these workshops have been a strength. The feedback and/or consultation in these workshops facilitated IFPRI to undertake and augment its studies to analyze long-term implications of the structural and rural transformation of the ASEAN economies on food security and small-scale rural producers.

Another strength was the networking and knowledge-event organizing skills of implementers.

Despite the COVID-19 pandemic that made the implementers postpone several project activities, we are still receiving technical assistance requests from the ASEC, Grow Asia, and IFAD Philippines to help them to implement their program. It shows that the implementers are trusted and have a good relationship with the partners in the ASEAN region.

The biggest challenges during the implementation were the COVID-19 pandemic and the delay in processing the project extension. As reported in the year 5 semi-annual report, implementers faced severe challenges implementing most project activity due to the COVID-19 pandemic. The lockdown regulations in most countries forced implementers to postpone all the events-related activities in year 5 which caused some delay in the project implementation. It was a very challenging time. We feel responsible for accomplishing our committed deliverables but have been unable to execute them due to these unprecedented major events. Therefore, an extension request to IFAD was sent to complete our project.

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During the process, some project activities had to be withheld which required contract renewal, including with our own project partners.

Project challenges in the earlier period were staff movements, country partners' collaborations, and various government procedures, which often caused a delay in the project implementation. The implementers also faced a challenge in connecting/synchronizing the agenda of the ASEC to the ATMI-ASEAN's agenda at the regional level and vice versa, especially in the course of the implementation of technical assistance of the regional value chain roadmap exercise. Further, the additional support requests from ASEC, which sometimes are not in line with the project's work plan, and the lack of support from ASEC in responding to the project's agenda at the regional level were difficult to overcome.

L. Way Forward

The implementers aim to sustain project work on a broader scale by developing the NePAAA in the long run. It is intended to provide evidence-based policy options and recommendations to AMAF and other regional stakeholders.



Figure 38. Mr. Abdelkarim Sma of IFAD

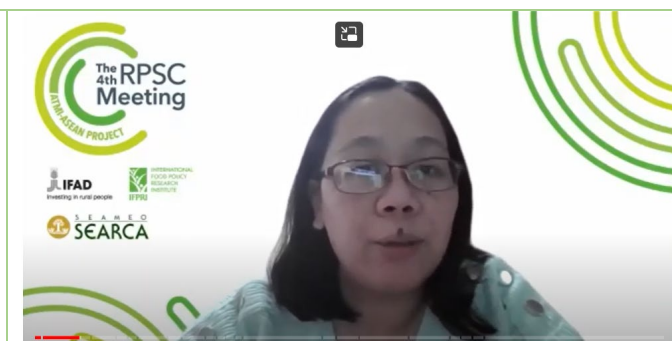


Figure 39. Ms. Bernice of SEARCA

It was launched at the 4th RPSC meeting and will be developed beyond the SEA region. It will be linked to a network facilitated by IFPRI, ReSAKSS Asia.

NePAAA will have members from NPSCs, RPSCs, research professionals, and policymakers in the ASEAN region and beyond. In the first six months, membership was established by inviting potential members from the ASEAN region and elsewhere.

The scope of work of the network is elaborated below:

- Provide evidence-based empirical policy analysis aimed at fostering a cooperative environment among member states
- Disseminate the research and capacity-strengthening materials to different stakeholders from the ATMI-ASEAN project and other research to the stakeholders
- Facilitate knowledge-sharing, studies, and evidence-based dialogue among members
- Facilitating the alignment and engagement of all relevant stakeholders from governments, civil society, research and academia, farmers' associations, and the

private sector, and providing a venue to disseminate the results of the national-level policy studies

- Wider engagement through organizing an annual forum to discuss agriculture and its challenges and opportunities in the ASEAN region to come up with relevant pro-smallholders' policy recommendations for the AMAF and/or another regional stakeholder. Attempt to set up such a system, which, if resourced, could continue beyond the project's life cycle
- Develop and publish communication and publications/outreach products
- Identify opportunities for resourcing the network

To operationalize its activities, NePAAA aims to build a strong network of organizations, experts, and working groups for regional and national chapters. Therefore, the proposed structure of NePAAA will consist of a network of stakeholders with regional and national experiences as technical resources and a secretariat for performing the administrative functions of NePAAA.

Presently, the Secretariat is housed within the IFPRI South Asia Regional office, based in New Delhi, India. This is aimed to be transferred to AMS over time. The Secretariat is responsible for providing administrative and content support to working groups at the regional and national level (chapters) and facilitating services to members.

Working groups consist of members and will be responsible for advocacy and providing thought leadership in knowledge management and membership engagement activities. The NePAAA Technical Advisory Committee (NTAC), a core group of 5–10 members, is responsible for the overall management and execution of activities. The NTAC will nominate a Chair and a Vice-Chair from the core group or NePAAA members with a pre-defined process. The regional and National Chapters and working groups will report to the Technical Advisory Committee Secretariat.

Solid and active membership is essential for the success of NePAAA, with the membership comprising members across different areas. To strengthen members' participation, NePAAA will constantly offer members high-quality and valued services.

Proposed services include networking and collaboration opportunities via NePAAA activities, events, a knowledge portal and publications, visibility among key stakeholders, and advocacy opportunities by participating in relevant working groups and government engagements.

The key functions of the NePAAA body are stated in Table 13.

Table 13. Proposed NePAAA Key Functions

| NePAAA body | Composition | Key functions |
|--------------------------|--|---|
| NTAC | 5–10 members nominated as founder level members | Apex body responsible for all strategic decision making |
| NePAAA National Chapters | No limit, any interested individual and organization can become a member | To receive the services listed in the SOW |
| Working Groups | Smaller groups of 5–6 key experts and members on different sub-themes headed by a chairperson | Work as task force on key issues and sub-themes and deliver products/strategies, etc., for NePAAA members |
| NePAAA Secretariat | The secretariat will be responsible for providing administrative and content support to working groups at the regional and national level and facilitate services to members | Secretariat will be responsible for regular day-to-day decision making in running the NePAAA activities |

The proposed NTAC member are coming from the existing ATMI-ASEAN’s RPSC members:

- Mr. Cheattho Prak, MAFF, Cambodia
- Dr. Silinthone Sacklokham, Ministry of Education and Sports of Lao PDR, NUoL
- Dr. Tin Htut, Agribusiness Value Chain Expert, Myanmar
- Dr. Zaw Oo, CESD, Myanmar
- Dr. Tran Cong Thang, IPSARD, Viet Nam
- Dr. Roehlano M. Briones, PIDS, the Philippines
- Ms. Maria Elena V. Rebagay, AFA, the Philippines
- Mr. Florante Villas, AsiaDHRRRA, the Philippines
- Prof. Dr. Asdi Agustar, RSAA President, Indonesia

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- Ms. Bernice Anne C. Darvin, SEARCA
- Ms. Aniq Fadhillah, IFPRI, ex-officio NePAAA Secretariat

NePAAA engagements

The implementers engaged the SEARCA Alumni network to gain members. The president of RSAA was invited to attend and present at the 2nd ATMI-ASEAN HLPF.

NePAAA webinar series

The ATMI-ASEAN project organized NePAAA webinar series to disseminate the ATMI-ASEAN project's research and provide a platform for other stakeholders to share the research in the SEA region.

Webinar Series 01

Title: Market integration in Viet Nam within and beyond ASEAN

Date|Time: April 13, 2022 | 14:45 IST

Presenter: Dr. Mamata Pradhan



Figure 40. Social Media Publication of the 1st NePAAA Webinar Series

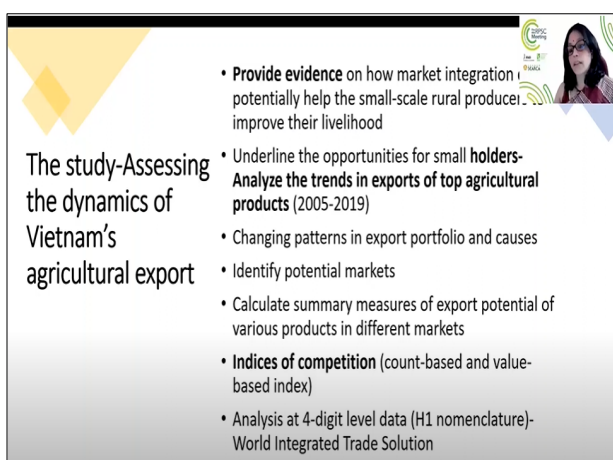


Figure 41. Dr. Mamata Pradhan Presented at the 1st NePAAA Webinar Series

Webinar Series 02

Title: India–Pulse implication for Myanmar (including pulse roadmap done by SEARCA)

Date|Time: April 13, 2022 | 14:45 IST

Presenter: Dr. Devesh Roy



Figure 42. Social Media Publication of the 2nd NePAAA Webinar Series

Webinar Series 03

Title: Agricultural Transformation, market integration, and smallholders in Southeast Asia: Regional overview and some micro-evidence from Viet Nam

Date|Time: April 29, 2022 | 14:00 IST

Presenter: Dr. Hiroyuki Takeshima



Figure 44. Social Media Publication of the 3rd NePAAA Webinar Series



Figure 43. Dr. Devesh Roy Presented at the 2nd NePAAA Webinar Series



Figure 45. Dr. Hiroyuki Takeshima Presented at the 3rd NePAAA Webinar Series

Webinar Series 04

Title: Assessing the effects and coping mechanisms of trade sanctions on Myanmar: a look through different margin of adjustment

Date|Time: May 18, 2022 | 14:00 IST

Presenter: Dr. Devesh Roy



Figure 46. Social Media Publication of the 4th NePAAA Webinar Series



Figure 47. Dr. Devesh Roy Presented at the 4th NePAAA Webinar Series

Webinar Series 05

Title: Impacts of the Ukraine Conflict on Global Food Prices, Food Security and the specific implications for ASEAN countries

Date|Time: July 13, 2022 | 09:00 UTC +7

Presenter: Dr. David Laborde



Figure 48. Social Media Publication of the 5th NePAAA Webinar Series



Figure 49. Dr. David Laborde Presented During the 5th NePAAA Webinar Series

NePAAA working groups on Rural Transformation in the Philippines

The ATMI-ASEAN, with IFAD Philippines and SEARCA, co-organized a hybrid high-level policy forum on rural transformation in the Philippines on September 8–9, 2022. The

project provided participants travel support and served as resources speaker in the forum.

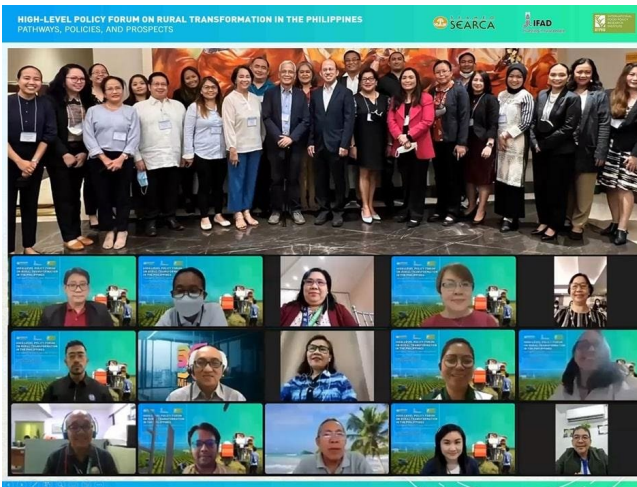


Figure 50. The HLPF on Rural Transformation in the Philippines on September 8–9, 2022

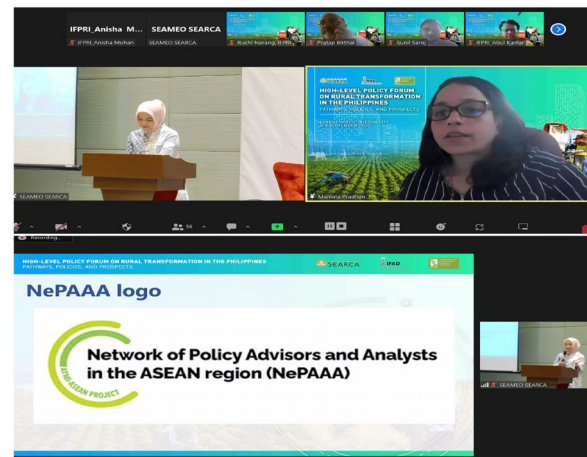


Figure 51. Introduction of NePAAA at the HLPF on Rural Transformation in the Philippines

Implementers introduced NePAAA to participants and established the first national-level NePAAA technical working group on Agriculture and Rural Development in the Philippines.

The rural working group was chosen to complement the work of the Philippines government to develop a roadmap for rural transformation in the Philippines.



Implementers invited experts on rural and agriculture to provide baseline and guidance on what kind of problems should be highlighted in the working groups.



The forum discussed and summarized top five prioritized issues on agriculture and rural development in the Philippines. Result of the discussion about technical working group’s focus, action plans/activities/programs, and members are stated in Table 14.

Figure 52. HLPF on Rural Transformation in the Philippines

Table 14. Result of the Roundtable Discussions

| Focus | Action Plans/ Activities, programs, etc. | Members |
|--|--|---|
| Data analytics / info management | Guidebook | S University Colleges (SUCs), LGUs ² academe |
| Skills / competency development / enhancement | Framework | Stakeholders |
| Indicators | Develop TOR | NEDA-LEDAC |
| Data gathering | Convene potential members to understand the commitments and limitation resource requirements | Research Institutions |
| Mechanisms that need urgent government / PS investments to support the boost for other | Set what to focus on and what not do | Local SUCs |

| | | |
|---|--|--|
| commodities/crops in the Philippines | | |
| Key PPP needs at the local level to enable local governments to implement EO 138-Devolution | The Grow Asia / Philippines partnership for Sustainable Agriculture operates communities of practice, networks, and working group. We can support the management/facilitation of the network | Policymakers (Politicians) |
| Innovation | Benchmarking of regional research and development agenda | Board members MLGH, PLGW |
| Lead a social enterprise development | Data center for program/projects in rural transformation | Farmers |
| | Codify all existing rural transformation networks (database) | Regional inclusive innovation centers (RIICs) |
| | Develop network governance framework | Subgroups could include policy experts but there should be initiatives to consult other stakeholder gaps |
| | Organize network: secretariat, leadership/membership | Volunteers |
| | Revisit GOP's HNRDA 2022-2028 | |
| | Build on the outputs of previous programs/projects in rural transformation for upscaling | |

ATMI-ASEAN meeting on sustainability of NePAAA between IFPRI-SEARCA and IFAD held on September 16, 2021, highlighted the following as a way forward for the sustainability of NePAAA:

Summary of discussions

- Opening remarks by Mr. Karim highlighted the importance of sustaining the network beyond the closing of the grant and explore ways to embed the network in future operations in the region and beyond
- Dr Rashid shared the background of the development of a similar network in Africa (ReSAKSS Africa) under the Initiative to End Hunger in Africa (IEHA), that has now transitioned into an institution based in Rwanda and the establishment of the New Economic Partnership for development in Africa that emerged through partnerships with the African Union and others
- He also mentioned that a similar network, ReSAKSS Asia (RA), was initiated by IFPRI in Asia about a decade ago. IFPRI is now engaged, through different projects, with three major regional economic bodies in South and SEA – SAARC, BIMSTEC, and ASEAN. RA is now being resurrected with support from USAID and the networks with each of these bodies can be expanded through RA to further the collaboration in the region; this is currently developing, and more details will be solidified in time. But for this, Dr. Rashid stressed the need for new funding modalities to sustain the NePAAA network
- Dr Pradhan outlined how the network was formed and talked about the recent establishment of the working group on rural transformation
- Short-term challenge is on finding resources to sustain the network beyond project closure, in order to continue expanding the membership of the network, sustain the functioning of the working groups, and address the recommendations coming from them

Opportunities for funding and expansion of the network:

- Integration of NePAAA in the activities under a new IFAD proposal on Green Recovery and Economic Empowerment in ASEAN to be funded through Korean Supplementary Funds
- IFAD to explore opportunities to expand the network to the Pacific through its work
- IFPRI is exploring opportunities to raise resources through its work with USAID
- IFPRI exploring opportunities to collaborate with ReSAKSS Asia, a network led by IFPRI
- IFPRI is exploring opportunities for partnerships under the One CGIAR Initiatives
- SEARCA exploring opportunities to expand the network through its Regional SEARCA Alumni Association and other activities
- Highlight NePAAA in relevant work/events being done by the institutions, or invite network members to speak on these events to sustain the momentum

Going forward:

- The three organizations agreed to keep each other updated on progress regarding the opportunities listed above
- Keep looking for low-cost opportunities to sustain the network by consolidating on existing work and possibly engaging with existing network members via NePAAA sessions in regional events
- SEARCA to update on any opportunities that might emerge through its interactions with Asian Development Bank (ADB) and International Rice Research Institute (IRRI)
- IFAD to keep IFPRI and SEARCA informed about the next call for grant proposals

A core element of NePAAA is partnership of regional network of policy analysts, advisors, development practitioners, private sector representatives, and other stakeholders in the ASEAN region working on agricultural transformation and market integration. The ultimate objective is to make evidence-based policy insights and other information readily available and effectively disseminated in partnership with different stakeholders in the region and

capitalize on the momentum that this project has generated till now. IFPRI and its partners are actively seeking resources to sustain the functioning of the network. While there is no confirmation yet, IFPRI is continuing to work on seeking support from donors including IFAD and other development partners. While this network started as a part of the ATMI-ASEAN project, this is envisioned as an independent program in the future subject to availability of resources.

M. Evaluation

The implementer prepared and circulated evaluation form to project’s targets. It was circulated to more than 250 contacts and received about 35 responses. This survey was conducted to look into and to understand the impact of the project outcomes during the implementation from 2016–2022.

The image shows a screenshot of a Google Forms survey titled "ATMI-ASEAN SURVEY FORM". The form is divided into several sections:

- Header:** Includes the logo for the Agricultural Transformation and Market Integration in the ASEAN Region project, along with logos for IFPRI, IAD, and SEARCA.
- Introduction:** Explains the project's goal to measure the impact of agricultural transformation and market integration from 2016-2022. It mentions the involvement of IFPRI, IAD, and SEARCA.
- Engagement:** A section titled "Introduction and Engagement with ATMI-ASEAN" with a question: "How have you been engaged with ATMI-ASEAN?". Options include:
 - NPSC
 - RPSC
 - High-Level Policy Forum (HLPF)
 - I do not know about ATMI-ASEAN
 - Other
- Research and collaboration:** A section titled "Research and collaboration" with a question: "Which of the above agricultural transformation outputs have you used/will use in your work?". It lists five outputs:
 - Agricultural Transformation and Market Integration: Theory, Concepts and Definitions
 - Overview of the agricultural modernization in Southeast Asia
 - Transformation and Sources of Growth in Southeast Asian Agriculture
 - Structural Transformation in Southeast Asian Countries and Key Sectors
 - Micro-analyses of smallholder capabilities in agricultural transformation and market integration in Southeast Asia
 The question is followed by radio button options: 1, 2, 3, 4, 5, and "None were of interest to me".
- Personal Information:** Fields for "Name of the respondent", "Your email", "Gender", and "Age".

The form is displayed on a mobile device, showing a progress bar at the bottom indicating "Page 1 of 3".

Figure 53. End Project Survey

Constraints: Most project contacts have either changed their occupation, retired, or moved to another office. Therefore, implementers were unable to contact and receive feedback from most of the old contacts.

Result:

The responses were received from diverse countries including the Philippines (18), Cambodia (3), Indonesia (3), Viet Nam (3), Myanmar (2), Nepal (2), Bangladesh (1), Malaysia (1), Thailand (1), and Timor-Leste (1). In total, 55 percent are female respondents while 45 percent are male. From the findings it reflects that respondents have primarily worked on agricultural transformation and market integration issues in the ASEAN countries. However, in the agricultural transformation project research output, more than one-third of the respondents have used or are planning to use all

five research outputs in their existing work and more than three-fourth of the respondents had referred Theory Concepts and Definitions of ATMI work.¹

Similarly, for the case of market integration, more than one-fourth of the respondents have used or planning to use all five research outputs of market integration in their existing work.² However, for “value chain” work only 9 percent have showed intent to work on all seven papers and about one-third preferred to refer only to Cambodia’s value chain analysis for Maize.³ Similar to value chain work, only 12 percent respondents preferred to refer all National Strategic Plans of Action and one-third preferred to refer to only maize–animal feed industry roadmap in Cambodia.⁴ In our sample, more than 50 percent of the participants are from the Philippines but in terms of adopting the ATMI-ASEAN project research outputs, they preferred to replicate the cross-country findings.

In ATMI-ASEAN, role of networks and policy dialogues played an important role. More than 70 percent of the respondents believe that ATMI-ASEAN provided a usable platform for networks and dialogue which share insights and gather valuable information that will be applicable on future references. In addition to that, the other platform for networking in ATMI-ASEAN is NePAAA. It reflects that only 14 percent of the respondents engaged in NePAAA and it could be due to recent formation of the NePAAA body. About 35 percent of the respondents were not aware of the NePAAA and 51 percent didn’t engage in NePAAA.

Another dimension of ATMI-ASEAN project helped in expanding the knowledge on ATMI issues and it is found that more than 75 percent of the respondents stated that the knowledge on “sources of agricultural growth,” “value chain,” and “agricultural trade” had enhanced due to this project. However, when asked about the policy recommendations of ATMI-ASEAN, most have agreed on working on two broad issues,

¹ a) Agricultural Transformation and Market Innovation: Theory Concepts and Definitions; b) Overview of the agricultural modernization in Southeast Asia; c) Transformation and Sources of Growth in Southeast Asian Agriculture; d) Structural Transformation in Southeast Asian Countries and Key Drivers; and e) Micro-analyses of smallholder participation in agricultural transformation and market integration in Southeast Asia

² a) Market Integration with ASEAN and Beyond: The case of Myanmar; b) Assessing agricultural market integration of Cambodia within and beyond ASEAN; c) India’s self-sufficiency policies for pulses and their implications for Myanmar; d) India’s pulse policy landscape and its implications for trade; and e) Regional market integration: Assessment of agricultural trade potential between the ASEAN and South Asian countries

³ a) Value Chain Analysis of Maize in Cambodia; b) Analysis of Cross-border Maize Value Chain in Lao PDR; c) Assessing Transformation and Integration of Pulses Sector in Myanmar: Responding to Food Security and Inclusiveness; d) Pig Value Chain Analysis in Ha Noi province — Recommendations for Inclusive Growth; e) Value Chain Analysis of Selected Pork-Based Processed Products in Luzon, the Philippines; f) Implications of AEC and Trade and Investments on Regional Food Security; and g) Regional Roadmap: Maize-meat value chain

⁴ a) Maize/Corn-Animal Feed Industry Roadmap In Cambodia; b) Roadmap for Scaling up Myanmar Pulses Value Chain (2022–2026); c) Strategy for developing the animal slaughtering and processing industry and the livestock products market in Viet Nam; and d) the Philippines Processed Pork Industry Roadmap

a) assess market potential and the level of competition on a broad-based basis to export and diversify, and b) market integration within ASEAN region and supra-region is essential for growth.

The role under technical assistance in ATMI-ASEAN project, more than 60 percent respondents consider that “value chain assessment,” capacity for policy communication and policy brief,” “regional roadmap,” and “national roadmap” was most useful (ranked more than 4 out of 5) for them. This also reflects in the road mapping and value chain training in ATMI-ASEAN project. More than 43 percent respondents were aware of this training and rated high score to all sub-component of the training such as, a) upgradation in skills, b) knowledge enhancement, and c) value chain. With this training, more than 40 percent respondents implemented national/regional roadmap in their existing work profile and 23 percent respondents implemented value chain assessment, focus on agricultural trade and mechanization, and food safety issues. Whereas these technical assistance helped them in conducting value chain analysis of other commodities and developing roadmaps for other commodities.



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