

Roundtable on Inclusive Agribusiness in Southeast Asia

23-24 September 2015,
Ho Chi Minh City, Vietnam

Event Report



Table of Content

1	Introduction	3
2	Opening Session	4
3	Insights from Different Models	6
3.1	Rice	7
3.2	Tea and Palm Oil	7
3.3	Fruit and Vegetables	8
3.4	Livestock and Aquaculture	9
3.5	Agricultural Inputs	9
3.6	Coffee	10
4	Key Note Speeches	11
5	Critical Themes and Solutions	12
5.1	Inclusive Business Models	12
5.2	Delivering Impact at Scale	12
5.3	Securing Finance for Smallholders	13
5.4	Integrating Women in Agriculture	13
5.5	Enabling Policies for Inclusive Business	14
6	Closing Remarks	15
7	Comparing Country Context	16
8	Country Deepdive and Action Plans	17
8.1	Myanmar	17
8.2	Indonesia	18
8.3	Phillipines	18
8.4	Vietnam	19
9	Action Agenda	20
10	Closing Remarks	22
11	Conclusion	23
12	Participants	24

1

Introduction

H.E. Cao Duc Phat,
Vietnam's Minister
of Agriculture and
Rural Development
delivers the
welcome remarks



This conference report provides a snapshot of the rich content and discussions from the Roundtable on Inclusive Agribusiness in Southeast Asia, held in Ho Chi Minh City, Vietnam on 23–24 September 2015. The Roundtable brought together approximately 120 business leaders, key development practitioners, policy makers and research experts, largely from Myanmar, Indonesia, the Philippines and Vietnam. These senior practitioners are at the forefront of converting challenges into opportunities by implementing inclusive approaches to better engage smallholder farmers in value chains.

The roundtable provided a unique opportunity for stakeholders involved in inclusive agribusiness to:

- Learn from each other about innovative and effective models being implemented in ASEAN.
- Co-develop solutions through an ongoing practitioner network.
- Identify new investment and partnership opportunities.
- Reflect upon the necessary suite of policy and other support measures needed to grow and sustain inclusive agribusiness practice and innovation.

Participants engaged in interactive workshops and panel discussions to exchange lessons from practice, and opportunities and challenges for inclusive agribusiness in Southeast Asia. The key highlights from the Roundtable include:

- Minister Phat from the Vietnam Ministry of Rural Development and Agriculture (MARD) and the Australian Ambassador Borrowman to Vietnam sharing their views on the importance of inclusive agribusiness in Southeast Asia to the economy of Vietnam, Australia and the ASEAN region.
- Senior practitioners exchanging ideas on viable inclusive business models, delivering impact at scale, integrating women in inclusive business, financing smallholders and inclusive agribusiness in the region, and policy innovation for inclusive agribusiness at scale.
- The development of action-oriented priorities to deepen and expand inclusive agribusiness in a sustainable way in Indonesia, Myanmar, the Philippines and Vietnam.

The Roundtable was hosted by Grow Asia and the Ministry of Agriculture and Rural Development of Vietnam. The event was convened by the Food System Innovation Initiative,¹ Seas of Change² and the Global Donor Platform for Rural Development (GDPRD),³ with support from the Australian Department of Foreign Affairs and Trade (DFAT).

¹ **The Food Systems Innovation (FSI) Initiative** seeks to use research and knowledge management to stimulate innovation in the practices, institutions and policies that deliver food security. It is a partnership between the Commonwealth Scientific and Industrial Research Organisation, the Australian Center for International Agricultural research and the Australian Department for Foreign Affairs and Trade.

² **Seas of Change (SoC)** is a program that seeks to enable an inclusive business oriented approach to agricultural development. It is led by the Center for Development Innovation (CDI) of Wageningen University and Research Centre in the Netherlands.

³ **The Global Donor Platform for Rural Development (GDPRD)** is a network of 38 bi- and multilateral donor organizations that seek to promote effective policy and investment in agriculture and rural development.

2 Opening Session

Opening remarks
by Mr. Hugh
Borrowman,
Australian
Ambassador to
Vietnam



Ms. Kavita Prakash-Mani, Executive Director, Grow Asia opened the Roundtable, introducing His Excellency, Dr. Cao Duc Phat, Minister of Agriculture and Rural Development of Vietnam and the Government of Australia's Ambassador to Vietnam, Mr. Hugh Borrowman. Opening speeches by the Minister and the Ambassador underscored the importance of innovative public private partnerships in taking forward Vietnam's and ASEAN's agricultural development objectives.

The Roundtable was welcomed as a platform for strengthening existing networks, sharing knowledge, inspiring new research, promoting collaborations, and exploring practical and innovative solutions. Delegates were challenged to initiate new and inclusive agri-business partnerships in the region. Minister Phat noted that deepening trade relations brings both opportunities and challenges to smallholder farmers as well as to businesses. He also recommended that this important conversation among leading practitioners be an annually recurring event. Ambassador Borrowman's speech highlighted the depth of Australia's support for the agriculture sector in Vietnam and the future potential that Australia sees for innovative public-private partnerships to contribute to more inclusive economic development.

Following the opening address, there was a plenary panel on Inclusive Business in Asia with top leaders from government, business, civil society, and academia. Mr. Ganesan Ampalavanar, Managing Director, Nestle Vietnam; Professor Paul Teng, National Institute of Education, Singapore Studies, Nanyang Technological University; and Mr. Tim Bishop, Regional Private Sector Specialist, CARE International) joined Minister Phat on the panel to discuss the benefits of inclusive business models from different perspectives.

Speakers encouraged roundtable participants to critically examine approaches being implemented in the region and identify areas for future innovation. In particular, speakers stressed the importance of generating practical advice and support for businesses looking to embed inclusive approaches into their value chains. New market opportunities to support smallholder farmers from across ASEAN to increase incomes and promote food security were also explored. Participants were challenged to help identify financing solutions, farmer aggregation opportunities, and more innovative use of technology to support inclusive agribusiness in the region. The importance of greater ASEAN cooperation on trade and market access was also highlighted as a key challenge to inclusive economic growth in the region.

Delegates stressed the importance of supporting large organizations to change their operating models in order to become more inclusive and proposed further professionalizing this process to create the expertise and capacity necessary to establish and expand inclusive practices.

Kavita concluded this session with the idea that personal leadership is powerful. If we build capacities we can change minds.



Ms. Parvathy Ramaswami, Deputy Regional Director, World Food Program among the audience

Dr. Paul Teng, Ms. Alison Eskensen, Dr. Bessie Burgos and Ms. Nerlie Manalili in audience



Mr. Ganesan Ampalavanar, Managing Director, Nestle Vietnam; Mr. Tim Bishop, Regional Private Sector Specialist, CARE International; Professor Paul Teng, National Institute of Education, Singapore Studies, Nanyang Technological University and Ms. Kavita Prakash-Mani, Executive Director, Grow Asia joined Minister Phat at the Plenary session

3

Insights from Different Models

Many companies and enterprises are developing, testing and scaling inclusive commercial approaches in Southeast Asia. These business models aim to engage, empower, and share value with stakeholders across the value chain, with a specific focus on smallholder farmers. In practical terms inclusive agri-businesses are aiming to: create new market opportunities, secure a supply base, enhance their corporate reputation, gain legitimacy in local markets, and/or create ‘ethical’ products through the inclusion of poor or disadvantaged people. Businesses may adopt inclusive approaches for a number of reasons, including:

1

Incidental inclusiveness

The inclusiveness as an unintended consequence of the company’s business. For example the product the company wishes to buy happens to be mainly produced by small-scale farmers.

2

Induced inclusiveness

The company has been persuaded to be inclusive and specifically target the poor in its business strategy.

3

Purposeful inclusiveness

The company has made a decision to place equal value on creating social outcomes and revenue in its business strategy.

To discuss these concepts and practices in detail, delegates broke into small working groups to discuss selected cases studies from the region. Each case study highlighted different types of business models across a variety of value chains.

Full case studies are available online at www.inclusiveasia.org. Below are short summaries of the discussed case studies for rice, tea/palm oil, inputs, livestock/aquaculture, fruit/vegetables and coffee value chains.



3.1 Rice

Two different inclusive businesses operating in the rice value chain in Vietnam were discussed:

Cuong Tan

Cuong Tan (CTC), is a medium size private company in the business of rice production and trade (import and export). CTC operates across Vietnam, with a strategy that is 'purposefully inclusive'. The business' aims and objectives, include developing a hybrid rice market in Vietnam through improved productivity to increase income of smallholder farmers. It operationalizes this strategy through renting land from smallholder subsistence rice farmers and clustering their holdings into one large field. It then hires the farmers as labor and provides them with rice seeds and other inputs, analyzes and identifies the markets, and plans the smallholder production accordingly. This is increasing farm yield and farmer income while securing their land. In fact CTC has found that the clustering of the small scale farms has enabled large-scale production and quicker adoption technologies for the farm.

CTC also advances working capital to farmers and helps them in making production plans which in turn reduces production risks. CTC provides all inputs for production, including seeds, fertilizers, pesticides and crop protection chemicals, equipment, and machinery as well as provides technical assistance and guidance to farmers. Additionally, the company offers profit-sharing to farmers and buys paddy seeds from farmers at price levels that are 15% to 30% higher than market prices.

Cong Binh

Cong Binh is a private company specializing in the production, processing and exporting of various types of rice, especially soft cooked rice and aromatic rice in Long An province, Vietnam. Cong Binh's inclusive approach can be described as 'induced'. Although the company has been established since 2006, it only started linking with farmers in 2014 following a government decree in 2010 that enabled companies to export rice export directly without organizations such as the Vietnam Food Association and other agencies. Cong Binh's business model buys rice from farmers, who follow a set quality procedure. In return, farmers receive support in terms of quality rice seeds, access to credit without interest, and a 50% profit share.

Cong Binh's strategy is to add value to rice exports through its production technologies, including drying, milling, polishing, color separation, packaging, storage, and market analysis. Cong Binh also acknowledges that the Long An local government has played a very important role in implementing its inclusive strategy. It has helped to establish successful business linkages between the company and farmers, cooperatives, and group cooperatives as well as providing technical support. In addition to the local government support other key partners in Cong Binh's success include a range of input partners and output partners. Lack of access to credit and loan is the biggest challenge for Cong Binh to expand the scale of its business operation.

Key takeaway messages

- 1 Alignment between national policies and local action is important for innovation.
- 2 Optimizing profit and sharing value has benefits that can exceed a profit maximization approach at each point along a value chain.
- 3 Sharing evidence of new opportunities and technologies with farmers is critical to successful inclusive business approach success.

3.2 Tea and Palm Oil

This working group discussed the similarities and differences between an organic tea company in Vietnam and a palm oil company in the Philippines.

Hung Coung

Hung Coung, is a Vietnamese private company that commenced its inclusive business approach five years ago, through a partnership with an NGO (VBCF). Through this partnership Hung Coung links with 635 farmers from the Dao ethnic group to source its organic tea. Not only does Hung Coung buy the tea from the farmers it also provides them with seedlings, organic fertilizers, and technical assistance, along with paying the fee for organic certification and investing in internal controls. In response to this, the farmers supply their tea only to Hung Coung's factory. This inclusive model was created by VBCF to help the Dao community establish a pro-poor sustainable production model with zero use of chemicals from seed to harvest. Over the past five years the revenue of farmers have increased 200-300%.

While this is a positive result, the partnership is also working to overcome a number of challenges related to scaling-up. The largest hurdles are: farmers limited access to finance, low awareness levels of sustainability practices and certification, land ownership issues, certification expenses, and high competition from other tea processors (including from China). Hung Coung is working to overcome these limiting factors to expand the model by organizing farmers into cooperatives, collaborating with donors, formalizing partnership agreements, providing credit to farmers, finding opportunities for cost sharing, and pursuing new market opportunities.



Bali Oil Company

Bali Oil Company was established in 2001 and has currently developed 15,000 ha in the Philippines – in Bukidnon (13th poorest province), and Mindanao (7th poorest province). The company contracts smallholder farmers (owning 1-5 ha and beneficiaries of agrarian reforms) to provide palm oil. Bali Oil guarantees purchase for palm oil as well as any intercrop produced. It provides a price monitoring service and also enables access to finance. In cooperation from Felda of Malaysia, the company has developed a 10-year technical plan, including the provision of palm oil seedlings, technical assistance, training on compliance with environmental standards, and organizational plans. In the future, the aim is to scale to 500,000 ha of idle land.

The main challenge is to organize farmers to achieve economies of scale and provide coaching/mentoring, in a learning-by-doing approach. The company wants to set-up clusters at different levels and provide management training. Other challenges include ensuring an equitable base price (especially as global price is low) and avoiding side-selling to competition. Scaling up will require more capital and risk management mechanisms, facilitation by a neutral coordinator to build trust, and engagement by the government.

Key takeaway messages

- 1 The importance of farmers being able to access capital.
- 2 The importance of using a neutral actor to facilitate communication among stakeholders.
- 3 The importance of building trust and sharing value within the chain.

3.3 Fruit and Vegetables

This working group focused on comparing and contrasting two 'purposefully inclusive' agribusiness models that have been in operation for 8-9 years in the Philippines and Vietnam.

Jollibee Foods Corporation

Jollibee Foods Corporation (JFC) is the Philippines' largest food service business. The Jollibee Group Foundation, the philanthropic arm of the company, wanted to develop an inclusive business program that would build on the core competency of JFC. In partnerships with Catholic Relief Services Philippines and the National Livelihood Development Corporation, the Foundation launched the Farmer Entrepreneurship Program (FEP) in 2008. FEP trains farmers on agro-enterprise development, assists farmers in organizational development and partnership management to ensure the sustainability of the links established between the farmers and their institutional buyers – local fast-food restaurants, supermarkets, and food processor. It also documents its initiative and develops program materials – case studies and audio-visual presentations – to share the learnings. The goal of this program was for farmers to supply 60 metric tons of onions in first year. As of 2015, the FEP farmers are providing 35% of Jollibee's onion supply.

The benefits for JFC to pursue this purposeful inclusive strategy from the Foundation are: diversification of supply base, and risk mitigation related to climate change as farmers are spread across climatic zones. While the key benefits for farmers include the commitment from JFC to buy, support in organizing farmers associations, access to finance, and collaborating with local government.

The Fruit Republic

The Fruit Republic (TFR) was established by a team of Dutch and Vietnamese fresh produce professionals who have worked together for over ten years in the agriculture sector of Vietnam. Since its foundation in 2009, TFR has developed into a leading fresh produce exporter of Vietnam, and has successfully developed the world's only year-round supply program of GLOBALGAP certified pomelo, seedless limes and dragon fruit.

To achieve this, TFR implemented a 'purposefully inclusive' business strategy that included an innovative contract farming system that includes hundreds of smallholder farmers. TFR has established both GLOBALGAP and HACCP certifications, abides by the social standards of the Ethical Trade Initiative (ETI), and are certified for ETI compliance for its contract farmers as well as for staff working in its processing facilities. All the fruits and vegetables it sources are from its own GAP certified contract farmers. It also has a large professional team, who work on a daily basis with the contract farmers to support them in improving their farm management and to assure that they comply with strict international quality standards.

Key takeaway messages

- 1 There are prohibitive trade barriers that inadvertently limit the growth of inclusive businesses.
- 2 The power of partnerships in re-inventing supply chains.
- 3 The importance of grounding inclusive business approaches in commercial interests of both the smallholders and the anchor company.



3.4 Livestock and Aquaculture

In this working group one example of an inclusive agribusiness operating in Myanmar was discussed and then participants related this example to their own experiences in other livestock value chains.

Htoo Thit Fish Feed Company

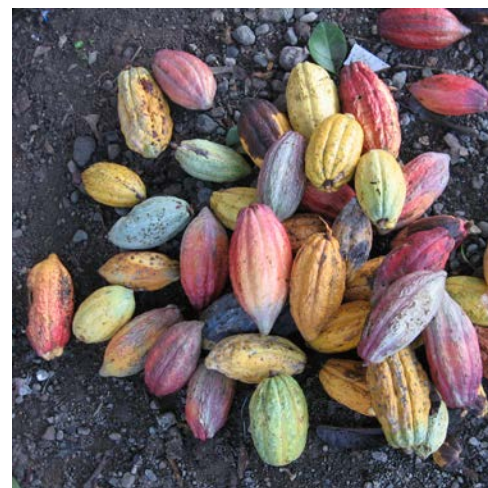
Htoo Thit Fish Feed Company is a family company that produces and supplies fish feed for fish farmers serving 20,000 acres in the Ayeyarwaddy Delta of Myanmar. The company has a range of distribution channels through both large farms and a sales network. Farmers can buy the feed on credit but are then obliged to sell their fish to the parent company. The company supports farmers with extension services and seminars and takes a flexible approach to repayments if farmers have been adversely affected by weather events.

Farmers benefit through access to high quality and innovative feed products and extension services as well as access to markets, which removes some risk for farmers. This provides a “one-stop shop” approach. Despite the large scale of the operation with many farmers involved the company would not explicitly articulate their business model as being ‘inclusive’. There is no external (donor) finance or policy support involved in the operation.

The constant technological innovation of the fish feed products is a key to the success of the operation. While this business model appeared to be working well for both the farmers and company, the case raised lots of discussion about the advantages and disadvantages of different models.

Key takeaway messages

- 1 A need to define what constitutes ‘inclusive’ in terms of economic benefits for farmers as well as ownership, decision making power, risk management and monopoly issues around both input and output markets.
- 2 Access to finance and good advice on farming practices and technology are fundamental for taking an inclusive business model to scale.



3.5 Agricultural Inputs

This working group compared and contrasted two different inclusive agribusiness models supplying agricultural inputs in Vietnam.

Olam

In 2002 Olam, a multinational company, entered the spice trade in Vietnam, focusing on pepper. While the productivity of black pepper in Vietnam was very high, Olam wanted to develop a strategy aimed at reducing the environmental impact and cost of high chemical, while adding value through grinding and certifying the sustainability of the crop by working with Rainforest Alliance. Working with the NGO, SNV, a farmer cooperative called Quang Than was created and a dual contract to buy from the coop and supply to the agent was established. Olam also sends agronomy updates and price updates to farmers via text message and guarantees purchase at daily market price plus a 2% premium. Farmers are paid immediately and are free to sell on the open market, with the risk of crop failure being borne by the farmer.

Currently, Olam is buying 470 tons of pepper from 170 farmers, with an aim of increasing this up to 6,000 tons in 3 years. The program has so far been successful in reducing input costs by 15%, water usage by 10%, pesticides use by 25%, and nitrogen fertilizers use by 15%. The 2% premium is attracting farmers and building loyalty. Together with the guarantee to purchase, this is creating a pull from farmers as there is more certainty and they can plan ahead.



Binh Dien-Lam Dong

Binh Dien-Lam Dong joint stock company (BLC) is a medium sized company established in 1998. It is 51% state-owned and produces and supplies more than 100 organic fertilizer products to farmers. It is collaborating with farmers associations as distributors and undertaking on-farm trials to reduce nutrient leaching and increase nutrient uptake. It is working with thousands of farmers and offering a deferred payment scheme (free credit) to allow farmers to pay at next harvest. Most farmers are smallholders with less than 0.5ha and lack of capital.

BLC's success factors include a strong alignment between government and company goals, clustering of services, stable relationships with farmers and farmer organizations, and enabling farmers to access high value organic markets. It has built an inclusive distribution system that involves Farmer Associations, Provincial Department of Agriculture and Rural Development, along with farmers to not only promote marketing and sales but also effectively deliver technical assistance to farmers. BLC has learned that its strategy of focusing on product quality along with engaging with farmers to solve collaboratively problems in production, such as access to funding, has created strong and reliable connections that reduce risk for both farmers and the company.

Key takeaway messages

- 1 Engaging with farmers is an important element for success and risk management.
- 2 Collaboration is the key to sustainability.
- 3 Scaling good models may also require public investment.

3.6 Coffee

In this session two different multinational inclusive agribusiness models operating in the coffee value chain in Vietnam were discussed.

Nestlé

Nestlé, a multinational company, is in the process of setting up a new coffee eco-system consisting of new cooperatives and financing innovations in a PPP model to source high quality Robusta beans. More than 30 partners are involved in the Nestle partnership with the aim to make Vietnam the recognized reference of Robusta based on three pillars:

- 1 Good farming practice.
- 2 Farmer Groups.
- 3 Linking farmers to finance.

The government provides extension services based on guidance from Nestle and other partners and covers 50% of those salary costs as its contribution to the PPP. It also supports cooperatives e.g. by providing office space. The farmers are selected based on the advice of the extension workers. Partners develop demo plots showcasing good farming practices, which convinced initially hesitant farmers on the positive difference between recommended practices and standard practices. Initial support was provided free but for the second round, farmers are required to disseminate good practices to at least 50 farmers. As farmers' financing needs vary across the crop cycle, an innovative financing scheme through credit cards is being developed to cover the cost of fertilizers and to spread finance flows over the year.

Ecom

Ecom is a global trading house for coffee, cocoa and cotton with a focus on sustainable sourcing. Its subsidiary Sustainability Management Services Ltd. (SMS Vietnam) was founded to implement the sustainability technical assistance programs for the group's purchasing. SMS Vietnam is currently working in three pillars:

- 1 Certification programs to train farmers and prepare them for audits, reaching 6,000 farmers, who contribute 45,000 tons of coffee beans. Ecom bears all costs of certification.
- 2 Plant nurseries for high quality seedlings.
- 3 Implementing on-the-ground solutions for farm management: less fertilizer, more composting, reduced irrigation.

Key takeaway messages

The discussion concluded with agreement that both models were inclusive due to:

- 1 Their focus on environmental sustainability.
- 2 Their payment of a premium to farmers.
- 3 The reduced risk for farmers.

4

Key Note Speeches

The afternoon session kicked off with two keynote speeches by Dr. Andrew Hall (CSIRO) and Mr. Mark Winters (Palladium Group) about their respective research.

Dr. Andrew Hall

The first speech, by Dr. Andrew Hall, provided an overview of the key findings from a study CSIRO has been undertaking over the last 3-6 months with partners in Southeast Asia (IPSARD, Can Tho University, AIT, PBSP, AESI, BIC and IPB). The study reviewed how companies develop and use ideas and business models that allow them to make profit, while at the same time including and sharing benefits with smallholders and poor people. In particular the study examined:

- What these innovations look like and how and why they came about?
- If and how these innovations are spreading?
- Where new sources of innovation might come from?
- What sort of support and investment from the public and private sectors could help accelerate the emergence and spread of innovation of these?

Information from close to 40 companies in Myanmar, Vietnam, Indonesia and the Philippines informed this analysis. Initial findings include:

- Social inclusion and environmental sustainability are starting to make good business sense for some agribusinesses in Southeast Asia. New opportunities are being created for smallholder farmers by providing access to domestic and global value chains, technology and a range of advisory, financial and market information services. This trend in business innovation could fundamentally change the way agri-food markets work in the region, with critical implications for public and private investments and partnerships.
- Many global agri-businesses that have made a corporate commitment to inclusive business are successfully piloting a number of schemes. However, small and medium scale enterprises (SMEs) are a critical source of inclusive business innovation because of their role in making new products and services available to smallholder farmers that aid their entry into value chains. It is in the SME sector that public investments could have catalytic effects in disrupting business practice, spreading inclusive business models in the wider agribusiness sector.

Mr. Mark Winters

The second speaker was Mr. Mark Winters, who spoke about the current status of impact investing in inclusive agribusiness in Southeast Asia. Mark presented the preliminary findings and recommendations from a study focused on four countries: Indonesia, Myanmar, the Philippines and Vietnam. The study identified that all investors are looking for businesses that have at least two to three years trading history, a healthy balance sheet, professional management, commercial or near-commercial returns and potential for existing social impact to scale. Thus, the key problem can be described as: a limited pool of 'investable' agri-businesses. The study highlights potential opportunities to address this bottleneck, including:

- **Option 1**
Facilitate improvements in the market system for impact investment into agriculture by expanding the pool of investable agri-businesses through encouraging greater connectivity between impact investors and the widest possible pool of potential investees.
- **Option 2**
Facilitate improvements in the market system for early-stage agri-businesses by addressing systemic constraints to the formation and early-stage growth of agri-businesses.

Both reports are available online at www.inclusiveasia.org



Dr Andrew Hall,
FSI Project Leader, CSIRO



Mr. Mark Winters,
Palladium Group

5

Critical Themes and Solutions

Building on the outcomes of the case studies, the common themes and needs identified, this session included five concurrent break-out discussions. Participants delved deeper into understanding and brainstorming about the lessons, challenges and possible solutions.

5.1

Inclusive Business Models

Delegates who attended this session had the opportunity to learn more about the LINK model developed by CIAT and others. Following a brief introduction to the methodology, the group used the four building blocks: value chain mapping, business canvas, the new business model principles and prototyping, to evaluate the inclusiveness of the Jollibee Group Foundation Enterprise Farmer Program. The LINK model assesses: chain-wide collaboration, effective market linkages, fair and transparent governance, equitable access to services, inclusive innovation, and measurement of outcomes. The outcome of the discussion was a better understanding of how delegates can use the methodology to evaluate their business model for inclusivity.

5.2

Delivering Impact at Scale

In this group participants discussed how current value chain projects that aim to include smallholder farmers in formal value chains can be scaled up to reach more farmers as well as provide greater value. The experiences and lessons were from the Myanmar AWBA Group, East-West Seeds and Syngenta. In particular:

- Syngenta shared its key scaling challenges to strengthen farmer capacity building and incentives for adopting new technology into their farming practices.
- East-West Seeds explained that an important success factor has been the provision of extension services and training on horticulture production to farmers as a public good. This approach has filled an important knowledge gap that previously inhibited its ability to scale.
- Myanmar AWBA shared how developing mobile phone-based applications, which provide weather and price information as well as respond to farmer questions has reinforced its scaling strategy.

Main observations

- Scaling is not easy and simply extrapolating from successful pilots is not sufficient. Replication across crops and geographies may work better.
- Information and communication technology (ICT) solutions are yet to be deployed at-scale in agriculture. Such solutions will require multiple partners to collaborate on developing the content; however, such information sharing is not easy.
- Extension services are needed to reach scale. Private sector-led extension services can be scaled by linking to the education sector to build knowledge capacity in agriculture, peer training in village cluster, via printed extension material such as planting guides, and through ICT solutions.
- Engagement of smallholder as well as minority communities is important when designing for scale and insuring an alignment with their motivations.
- Development and strengthening of smallholder co-operatives will enable scale. Another model is to scale up by consolidating farms into one business unit.
- Behavior change is needed to achieve scale, this can be done through education and market incentives.
- There is a role for financing from donor agencies to support these efforts. Scale-up is not feasible with NGOs charging 'cost plus.'
- Scale cannot be achieved alone. Multiple players are needed to reach scale through co-investment and sharing risks.



5.3 Securing Finance for Smallholders

The aim of this discussion was to explore the financial trends, opportunities and challenges in inclusive agribusiness. The session was attended by a diverse set of stakeholders, including civil society, multi-national corporations, and donors.

Mercy Corps shared the opportunities, challenges and lessons it has learned from its inclusive agriculture finance collaboration with Bank Andara, BPI, Syngenta, and grain traders in Indonesia. In this partnership, Mercy Corps play a coordination role between the key stakeholders as well as providing financial literacy training to the participating farmers. Syngenta provides training and sells its technology to farmers. The farmers who have received training on both financial literacy and farming techniques are then potentially eligible to benefit from access to credit from Bank of Andara and BPI. The grain traders support the loan process through the provision of a list of farmers that they believe are low risk and also coordinates the repayment of the farmer loans. The relationship between the grain traders and bank is useful for correcting for asymmetric information and facilitating the due diligence process.

As participants discussed this model in detail, they also identified other innovative financing approaches currently being undertaken in Southeast Asia:

- The creation of a partial risk guarantee to support farm equipment leasing. This is essential to improve irrigation and the mechanization of farming in Myanmar.
- The use of a grant (provided by a donor) as a first loss tranche to mobilize \$150 million in private equity. For example, the fund, managed by Sarona, invests globally in growth-phase small and medium sized enterprises.
- Businesses providing training to mitigate capacity building risk, tied supplier credit, and the limited use of credit cards to provide grace periods (essential for farmers).

Key takeaway messages

- The importance of engaging financial institutions as direct stakeholders in agriculture value chain discussions, rather than as ancillary stakeholders;
- How different financing needs are evident across the value chain and solving financing needs for farmers alone will not lead to sustainable agriculture success; and
- The need for a catalogue of existing innovative financing approaches that are place in each country and the region including a brief description about each one to raise awareness about different opportunities.

5.4 Integrating Women in Agriculture

The discussion opened with data from the FAO about the ‘feminization of agriculture,’ which refers to the large and growing share of women in the agricultural workforce. The crux of the discussion focused on what are the incentives and challenges for businesses to integrate women into their inclusive agribusiness practices ‘as normal practice’. While there were contending views about the incentives and challenges, a key outcome of the discussion was that the approach should go beyond including women in agribusiness. It is about improving all stakeholders’ understanding about the role and value of women being engaged in a specific business ventures. In the absence of such a gender lens, it is challenging for market actors to build efficient market opportunities that consider and value women. Ideas from this discussion included:

- The need to develop a more persuasive and specific narrative for business about the need for integrating women as key stakeholders in agriculture.
- The importance of giving companies practical advice on how to assess the role of women and men in value chains, design appropriate products and processes that respond to these roles, engage women in governance and planning, and help build their capacity.
- The possible role for the public sector to stimulate inclusive agribusiness initiatives that undertake gender-differentiated assessments, for design and decision making purposes.
- Grow Asia should continue to champion women’s integration and inclusion in value chains, but not set women specific targets as this could make future work too narrow.

5.5 Enabling Policies for Inclusive Business

This group explored the opportunities and constraints for policies to support inclusive agribusiness. In particular delegates discussed the idea that policies play an important role in supporting or hindering the development of inclusive agribusiness in both ASEAN as a region and individual countries within ASEAN.

The policies discussion began with presentations from Dr. Paul Teng from the National Institute of Education in Singapore, Dr. Jared Greenville from OECD, and Mr. Prakash Jhanweer from Olam.

Dr. Teng emphasized the importance of taking an overall approach to policy from macro to micro enablers including, for example, regional trade setting through to country level labor policies and human resource development.

Jared explored the impact on inclusiveness of different policy settings from protectionist food-self-sufficiency to more open trade approaches and concluded that inclusiveness is facilitated by policies that encourage agricultural investment and a competitive and productive agriculture sector.

Prakash emphasized that from a private sector perspective a common set of regional rules on tariffs and customs are important to ensure supply chains are not interrupted. He also talked of the importance of common infrastructure and the critical role of technology development, such as mobile payments, for increasing the commercial viability of working with small-scale producers. (Background papers are available at www.inclusiveasia.org.)

This session concluded by highlighting the most critical takeaway messages, including:

- Agricultural production in the region is growing and it is expected that surplus production will make Southeast Asian countries important agricultural trade exporters and local businesses more globally connected.
- Greater alignment of national policy and trade settings could bring overall regional benefits. Addressing trade barriers, regulations of exports, and constraints for direct foreign investment will enable smallholders to connect to the global market.
- Better policies are needed to improve innovation, infrastructure and provide a better business enabling environment, greater access to credit and effective land tenure arrangements. In many regulatory areas the region underperforms in comparison to countries in South America and Africa.
- A common ASEAN market, infrastructure and policy on common natural resources should be the political goal of the future with common rules, regulations and sensible tariffs.
- Innovation in production and private sector engagement to support new technology, innovations and R&D is critical.
- Grow Asia is a credible platform that can help bring bottom-up messages from research organizations and farmers to inform policy makers and the private sector.

6

Closing Remarks

Day 1 concluded with remarks by Ms. Gisela Tiongson, Executive Director, Jollibee Foundation and Ms. Lany Rebagay, Regional Policy Advocacy Officer, Asian Farmers' Association for Sustainable Rural Development (AFA). Gisela commented that creating trust is a critical element to inclusive agribusiness along with partnership facilitation skills. She added that it is important that platforms like Grow Asia are demand driven and add value. Lany shared the farmer perspective, emphasizing the important role of farmer associations for scaling up and scaling out. Ultimately if successful, inclusive business models should expand farmers' choices and provide them with greater empowerment.



Ms. Lany Rebagay,
Regional Policy
Advocacy Officer,
Asian Farmers'
Association for
Sustainable Rural
Development
(AFA).

7

Comparing Country Context

The Roundtable kicked off Day 2 with keynote speeches that explored the inclusive agribusiness environment in Southeast Asia. Dr. Bessie Burgos, SEARCA introduced Dr. Paul Teng, Nanyang Technological University and Dr. Nerlie Manalili, Nexus Agribusiness Solutions, who shared insights on the ASEAN operating environment for inclusive agribusinesses.

Dr. Paul Teng

Dr. Teng shared a conceptual framework that explained:

- 1 The key domains of policy enablers (land tenure and property rights; the business climate; and the mix of national and regional policies).
- 2 The sufficient to necessary conditions for these enablers (useful immediate to essential enablers).

Using this framework, Dr. Teng provided a commentary on the inclusive agribusiness enabling environment in Vietnam, Philippines, Myanmar and Indonesia. Dr. Teng stressed the importance both of continued policy change to support inclusive agri-business, but also the importance of getting coherence across different enabling policy domains so that mixed messages and incentives were not sent to the sector.

Dr. Nerlie Manalili

Dr. Nerlie Manalili shared her findings from the recently completed study on the trends, function and success of inclusive agribusinesses in Southeast Asia. It was based on a review of 111 agribusinesses across four countries (Vietnam, Indonesia, Myanmar, and the Philippines). Dr. Manalili found that a number of business models have emerged, mostly private-led. These inclusive business models engage the participation of smallholder producers in the ASEAN economies. Her insights from these examples include:

- Product and market diversifications strategies are needed to broaden sources of growth and competitiveness because all four countries rely heavily on servicing traditional markets with traditional products, though starting to diversify by targeting traditional markets with new products;

- Private sector, donors and NGOs are typically the initiators and intermediaries for inclusive agribusiness initiatives.

- Success with ICT has been patchy and there still remains questions of scale, adoption and the relative benefit to smallholders.

- Although public sector activity lags behind activity from the private sector, there is a role for development organizations and civil society.

- Clear objectives, roles and responsibilities in multi-stakeholder partnerships will support success.

- The greatest benefits result from shared approaches to capacity building.

Both reports are available online at www.inclusiveasia.org



Ms. Anh Nguyen
from ACIAR asking
a question

8

Country Deepdive and Action Plans

Building on the key findings from the research presented, delegates were asked to focus on their respective countries and discuss how inclusive agri-businesses can be developed and scaled given the local context, opportunities and constraints.

8.1 Myanmar

The Myanmar country session was well attended with over 20 participants, representing multi-national corporations, local companies, farmers, international organizations and donors. The discussion opened with an update on Grow Asia's Myanmar Agriculture Network (MAN) which is working with 40+ stakeholders across four crop value chains and three cross-cutting issues. Its vision is Myanmar 30:30 – to increase Myanmar agriculture output to \$30 billion by 2030.

The discussion spanned the potential synergy between MAN and the Myanmar Food Security Working Group, the reasons for the limited participation of local companies in MAN, the relationship between the Government of Myanmar and local companies, and the importance of being more inclusive of farmers and farmer organizations.

Given the multitude of opinions in the room, there was a call for defining a common agenda, and focusing on the convergence of priorities and actions, and not politicizing partnerships.

Concrete follow-on actions include:

- 1 Continuing to build trust among current and future MAN stakeholders.
- 2 Liaising with the Asian Farmer Association to connect with the Myanmar farmer network and invite farmer participation in MAN meetings.
- 3 Inviting local companies to participate in MAN (including appointing one as a Co-Chair of MAN) and explaining the value proposition of collaborating with foreign companies to improve sustainable agriculture in Myanmar. Providing local translation services and/or alternating the working language of MAN meetings to foster a sense of inclusion.





8.2 Indonesia

The Indonesian country session was well attended with representatives from academia, private sector, farmers, international organizations and donors. The discussion in this session focused primarily on the Grow Asia country partnership, Partnership for Indonesia's Sustainable Agriculture (PISAgro). The group was given an overview of PISAgro including how it started, who is involved in the platform, and how it operates.

PISAgro was launched by the Government of Indonesia and local and international companies in 2011 at the World Economic Forum on East Asia in Jakarta. It is coordinated by a secretariat with three staff, funded by 23 paying members (including companies, NGOs and donors). It supports 11 working groups on different priority crops.

It was recognized that PISAgro is still learning and to be successful going forward its membership and engagements need to grow. For example, it is important that the secretariat re-engages constructively with the new Government of Indonesia, SMEs (who may not be able to afford membership fees), and farmer organizations. More information is at www.pisagro.org.

In particular the group noted that:

- 1 Multi-stakeholder arrangements are essential for successful inclusive agribusiness strategies and the quality of relationships are critical.
- 2 A renewed relationship with the new Government of Indonesia is particularly important for PISAgro success going forward especially linked to policy harmonization and coordination.
- 3 The PISAgro working groups that are currently successful are engaging more players, including smallholders, input providers, off-take partners and government.
- 4 PISAgro members need to reduce the input costs and develop tailored financial instruments.



8.3 Philippines

Approximately 25 stakeholders attended the Philippines country session. They included representatives from the private sector, civil society, government, academia and farmers. The group was provided with an overview of the current state of the Grow Asia partnership in the Philippines, including: the establishment of an interim secretariat, the identification of six priority areas for working groups (five crop value chains and one on finance) and the exploration of potential partners (15 partners have committed so far and a target list of stakeholders has been developed).

It was recognized that the PPP Centre focused on infrastructure provides an effective model from which to learn and apply lessons to the agri-business sector especially to share value and risk. The value of retaining flexibility and letting things evolve, rather than demanding a fully-defined theory of change from the outset was also discussed. It was suggested that if the partnership is to be successful it should be responsive, agile and creative, so that it can respond to private sector's needs in a timely manner and interests in order to keep them engaged.



Key things for the partnership to consider going forward include:

- Expand the current five crop working groups to include palm oil.
- Consider setting up a non-crop-specific working group that is designed to draw out lessons from existing inclusive agribusiness models.
- Identify specific research areas that would support the promotion of inclusive agribusiness, i.e. what knowledge is needed or where are the gaps in the evidence base exist.
- Include farmers from the start in the partnership.

8.4 Vietnam

The Vietnam country discussion was attended by almost 40 stakeholders from a wide variety of organizations. Mr. Tran Kim Long, Director General of the International Cooperation Department, Government of Vietnam's Ministry of Agriculture and Rural Development (ICD-MARD) opened the discussion by sharing his comments on the on-going commitment and support from the government for the Partnership for Sustainable Agriculture in Vietnam (PSAV), the success-to-date of the PSAV taskforces on coffee, tea, spices, vegetables, corn and agri-finance, and the importance of sharing Vietnam's learning and experience with other countries, whilst remaining willing to learn from peers.

The group then discussed the challenges facing the Vietnamese agriculture sector and potential solutions. These topics included:

— Finance

The need for domestic banks to consider agriculture as a growth sector; the role of microfinance in agriculture; attracting Foreign Direct Investment for agriculture; and, crop insurance, risk mitigation and mobile payment facilities, amongst other things.

— Local companies

The group confirmed that the PSAV needs to attract more Vietnamese companies, including SMEs, to expand its reach and impact.

— Farmers

It was widely agreed that farmers need to be more organized and the farmer cooperatives more professional, in order to leverage the bargaining power and production capacity of smallholders. In addition, both farmers and their representative organizations required capacity building.

— Partners

Participants in the Vietnam discussion called for support in helping identify potential partners and donors to help them expand and scale projects.

— Research

Much research was called for, in various themes, such as public-private partnerships, policy and finance.

— Project design

The group called for more robust measurement and evaluation of the projects and a responsible exit strategy to be included in the project design.

— Role of government

Some members of the group suggested that the government could improve infrastructure – both physical (to provide better logistics) and technological (to enhance communications) – to better connect the farmers to market.

The group prioritized finance, engagement of local companies and research as the most important areas of focus for PSAV.

9

Action Agenda

Informed by the discussions on the different case studies, the critical themes and the opportunities for country based activities, this session identified the actions points that had been identified as being the most important to consider. The top themes identified with specific actions suggested were:

Farmer voice

Farmers need to be engaged directly and need to have greater visibility in partnerships and different fora. For this it is also important to build their capacity and awareness and further develop farmer organizations. Specific actions points include:

- Increase farmer participation in Grow Asia and its country partnerships at governance and implementation levels.
- Develop a database of farmer organizations and hold regular farmer consultation / dialogues.
- Showcase successful farmer-entrepreneurs using media/social media and promote inclusive agribusiness models where farmers are co-owners of the agri-enterprise.
- Encourage World Economic Forum leaders and company CEO to visit farms to gain exposure and hold dialogue with farmers.

Performance measurement

It is important to define what success looks like and measure progress against agreed targets. To this end, we need to:

- Develop explicit theories of change, clarify common goals and a common indicator framework.
- Implement the metrics with existing projects.
- Conduct independent impact assessments for select projects.

Develop effective public-private partnerships (PPP)

PPPs enable multiple partners to work together, pool resources and bring different competencies to bear on developing inclusive business models. For this, we need to:

- Create a central repository of research and case studies, analyze them for success factors and additionality, and adapt them to local contexts.
- Scope and map PPPs at a national level including from Grow Asia country partnerships.
- Run workshops within regions to develop capacity to run agri-related PPPs.
- Develop policies to enable establishment of PPPs based on market system needs.
- Ensure that there are clear links to market, an exit strategy as well as a facilitator.

SME engagement

Including SMEs in partnerships will enable greater scale and reach and help strengthen the full value chain.

- Review current models of SME engagement in agriculture development with a special focus on innovation.
- Develop an inventory/registry of relevant SMEs, create a network of regional/ national SMEs, and engage SMEs through local associations.
- Invite SMEs to country partnership meeting and ensure that meetings are held in local language (or with translation).
- Identify services relevant to SMEs, e.g. training (based on a cost share model) and business linkages.
- Build the business case for SMEs to engage in multi-stakeholder value chain partnerships.

Define and prioritize inclusiveness

Inclusive business models need to promote 'purposeful inclusiveness' that enable all stakeholders to have an equal voice and see a fair sharing of risks and returns. For this, we need to:

- Understand the context, develop examples of inclusive agribusiness, and define the business case for being an inclusive business
- Optimize and not maximize profits, going beyond the short term returns to long term value addition for all partners especially smallholder farmers.
- Include the voice and influence of farmers in the value chain.
- Ensure full transparency of actions and outcomes.

Donor linkages

Donors can actively provide information, facilitate linkages, and increase visibility of programs and access points. Hence, we should:

- Bring donors into multi-stakeholder partnerships to support through investment, sharing of knowledge and policy technical assistance.
- Map current donor projects and provide information to partners on the different donors, their interests and requirements, programs and access points.
- Tap into donor knowledge and expertise e.g. performance evaluation and research on PPPs.



Value chain finance

Lack of finance to all players, including farmers, has been identified as a key challenge to developing inclusive agribusiness models across the value-chain. To address this challenge, there is a need to:

- Identify and analyze models where finance has been included in the value chain.
- Engage local banks and enhancing their understanding of such models.
- Bring on board all varieties of financial institutions including international and local banks, insurance companies, financial institutes including micro-finance institutes, global donors and others.

Regional commodity trade

In the context of the ASEAN Economic Community and realizing the importance of export for many of the priority crops, facilitating regional trade will be important to ensure inclusive models of agriculture development. For this, there is a need to:

- Facilitate stakeholder forums bringing together trader and producers to highlight the challenges in cross-border trade.
- Develop case studies to highlight opportunities and constraints.
- Engage governments in policy discussion/formulation to facilitate trade and develop common standards.

Policy research

To document and share good practices and solutions and help create an enabling environment, policy research is required. This can include:

- Develop a comparative analysis of the constraints and solutions to inclusive agribusiness across ASEAN member states.
- Make evidence-based policy options available to policy makers.
- Transfer global best practice to ASEAN stakeholders.
- Convene a policy dialogue forum at the ASEAN level.

Case Study and Best Practice Research

Such research will facilitate learning across countries and enable all partners to learn from the experience of others, identify relevant partners and models, and highlight local, meso, and micro policy issues. For this, we need to:

- Link to academic and research institutes.
- Document cases of good practice on different crops / commodities, geographies, and stages of the value chain.
- Identify the enablers, incentives, challenges and impacts of the different approaches.
- Share the case studies widely in ways appropriate to different audiences including through posting them online.

Community of Practice

Networking, sharing and matchmaking will help to mainstream the idea and need for inclusive agribusiness. This requires:

- Convening practitioners in person from different organizations and stakeholder groups across the region to share success stories and failures, and create trust.
- Establishing a community around 4P: platform, policy, practice and products.

10

Closing Remarks

Different stakeholders were invited to share their perspectives as part of the closing remarks, including:

Mr. Tran Kim Long

Director General, ICD-MARD

Director Long thanked the participants for visiting Vietnam and attending the Roundtable. He reiterated Minister Phat's call to bring together engaged and committed stakeholders that want to support and empower smallholder farmers. Director Long also acknowledged the importance of learning from each other to better scale inclusive business approaches.

Mr. Erinch Sahan

Senior Advisor Business and Markets, Oxfam GB

Erinch Sahan reflected on ingredients of successful inclusive agribusinesses, with an emphasis on needing capable farmers, an enabling environment, and a well-developed off-take market. He commented that inclusion without viability is insufficient, and viability without inclusion is also insufficient. Erinch also highlighted that creating trust is critical to every aspect of scaling inclusive agribusiness and that we should think about building early bridges with civil society and farmer organizations.

Dr. Ann Florini

Academic Director, Master of Tri-sector Collaboration, Singapore Management University

Dr. Florini pointed out the importance as well as the difficulty in developing, and more importantly, sustaining successful multi-stakeholder partnerships. She highlighted that neither formal education nor on-the-job experience easily lends itself to navigating in this new arena of partnership approaches. Nonetheless, multi-stakeholder partnerships are incredibly valuable as their collective strength in leading transformative change exceeds what any one stakeholder could accomplish alone.



11

Conclusions

The two-day Roundtable garnered a lot of support and interest from the participants to work together to address some of the critical challenges and opportunities highlighted during the event, to ensure sustainable and inclusive agri-business in Southeast Asia. Besides informing the strategy and approach for the Grow Asia partnerships, the outcomes will be driven forward by all partners in their respective organizational capacities.

1
Seat at the table
It is important to ensure that all stakeholders have a seat at the table, especially farmers, local companies, and SMEs.

3
Secure financing
The need for financing to smallholder farmers and throughout the value chain is essential to improve agriculture development. This requires collaboration with a variety of financial institutions.

5
Community of practice
Communities of practice help to deepen the partnership network and draw on other’s knowledge and strengths. In particular, there was interest in bringing donors as active participants into the discussions.

2
Make the business case
Performance measurement is essential for making the business case to companies and farmers to engage in inclusive value chain approaches. There is need to build capacity to understand, collect and analyze performance data.

4
Supportive policies
Identifying policy needs and supporting dialogue remains central to the discussion about how to support smallholder farmers and sustainable agriculture.

6
Knowledge exchange
A knowledge exchange to facilitate cross-country and cross-crop learning will enable better exchange of best practices, tools and solutions.

12

Participant List

Name	Title	Organization	Base of Operations
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Roundtable on Inclusive Agribusiness in Southeast Asia

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