

Grow Asia Report on Progress

2019



WORLD
ECONOMIC
FORUM



Grow**Asia**

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Overview

Southeast Asia is home to 600 million people and is experiencing vibrant and fast-paced growth. The region is a leading exporter of crops such as palm oil, rubber, coconut and rice, and agriculture contributes significantly to exports in every country. Meanwhile, smallholder farming is the mainstay of agricultural production in ASEAN, with a high proportion of the region’s poor engaged in it.

While increasing demand could be met by a combination of food imports and the use of fewer, larger, and more modern farms, a more inclusive—albeit complex—approach would embed smallholder farmers into these modernizing supply chains.

As such, Grow Asia was established by the World Economic Forum, in collaboration with the Association of Southeast Asian Nations (ASEAN) Secretariat, to bring together farmers, governments, the private sector, NGOs and other stakeholders in Southeast Asia to convene, facilitate and help scale inclusive agriculture value chains as well as multi-stakeholder sectoral coordination. At the core of our work are three goals: to lift the productivity, profitability and environmental sustainability of smallholder agriculture in the region.

Grow Asia currently comprises the regional Grow Asia Secretariat in Singapore; six Country Partnerships, each supported by an in-country team; and 44 Working Groups, organized around specific value chains (such as coffee) or cross-cutting issues (such as agri-finance).

Impact

Country Partnerships Supported:	Grow Asia Partners:	Smallholder farmers reached:	Working Groups:	Value Chain Projects:
6	480+	1,339,030	44	43

Preface

The last 12 months have been a period of extraordinary growth, development and positive results for Grow Asia.

Across our Country Partnerships, staffing and funding have been significantly increased. The number of full-time staff doubled to 18, and the measures of their internal capacity and operational efficiency continue to improve. This reflects the development of our in-country teams as well as the ongoing support, guidance and cross-learning from our Singapore Secretariat. In 2019, we also launched a new Country Partnership in Papua New Guinea – our sixth in the region.

Learning has consistently been top of our partners' list of reasons for joining the network. In this past year, Grow Asia has organized around 50 learning events which range from workshops and webinars to specialist roundtable discussions and networking events. These, in turn, satisfy our partners' second priority – gaining access to networking opportunities and having the Grow Asia Secretariat broker new partnerships within our network.

We heard from our partners, and particularly the CEOs of private companies, that digital technologies offer the greatest potential for positively transforming the relationship between smaller scale producers and agribusinesses. To that end we have ramped up the Grow Asia digital program, delivering a series of learning events, created a number of Hackathons (bringing together the digital magicians in the region and the farming community), and launched a Digital Solutions Directory which showcases promising applications operating in Southeast Asia. With generous funding from the private sector, Grow Asia also launched an Accelerator Program, which provided guidance to seven early stage companies through mentoring and field testing by corporates.

The third priority of our partners is to have their collective voice be heard in policy dialogue. Grow Asia partnered with the ASEAN Secretariat to run an extensive regional consultation around the ASEAN Guidelines on Promoting Responsible Investment in Food, Agriculture and Forestry. These Guidelines were adopted by the ASEAN Ministers of Agriculture and Forestry (AMAF) in late 2018. Preparations are now being made for taking these Guidelines into widespread country-level use.



It is important to acknowledge at this point the support from our partners, whose drive to promote more inclusive and sustainable practices and support smallholders in the region continues to inspire us. We are grateful for the strategic guidance that our various committees and Working Groups have provided over the past year, as well as the support from the World Economic Forum and the AMAF.

We would also like to recognize that all this work has been made possible by the Government of Australia and the Government of Canada through their continued financial and strategic support, as well as that of the Swiss Agency for Development and Cooperation, the Inclusive Business Action Network, Canada's International Development Research Centre and the World Bank.

Grahame Dixie

Executive Director

Grow Asia

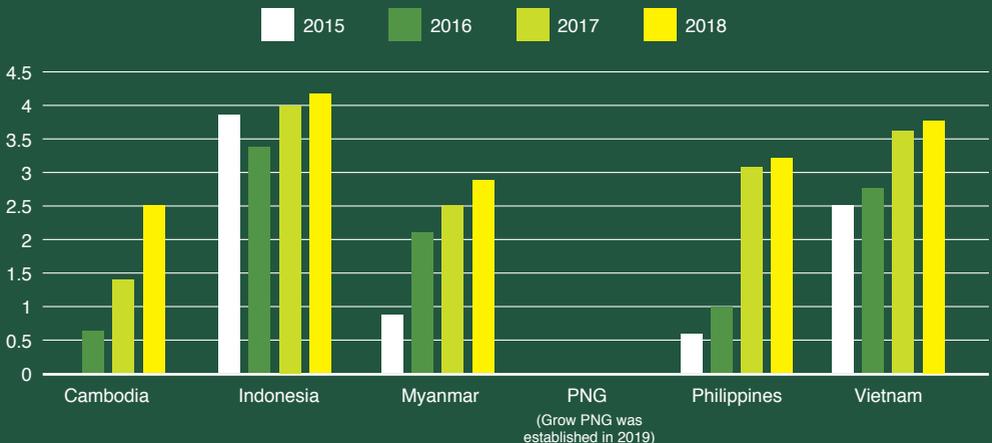
Building Effective Country Partnerships

The World Economic Forum and Grow Asia have catalyzed Country Partnerships in Cambodia, Indonesia, Myanmar, Papua New Guinea, the Philippines and Vietnam, staffed by in-country teams that Grow Asia has – to varying degrees – recruited, trained and funded.

The Country Partnerships supported by Grow Asia are at different stages of development due to the different local contexts, input of private sector partners and the unique economic and cultural environment in each country. Consequently, the Country Partnerships are at various levels of progress in terms of governance and activities.

The diagram below demonstrates the level of each Country Partnership’s activities compared to the previous year and, more importantly, their continuing improvement in capacity, effectiveness and autonomy. This model is based on a qualitative assessment carried out by Grow Asia in collaboration with the in-country teams and looks at their:

- 1 Financial independence and stewardship,
- 2 Organizational capacity,
- 3 Effectiveness around stakeholder engagement, and
- 4 Quality and impact of their Working Groups







Cambodia Partnership for Sustainable Agriculture

Working groups:

- Cashew
- Coconut
- Finding Niche Premium Markets
- Fruits & Vegetables
- Pepper

Partners:

40

The Cambodia Partnership for Sustainable Agriculture (CPSA) brings together companies, government agencies, civil society organizations, farmer groups and financial institutions to link smallholder farmers to the market with the shared goal of increasing farmers' profits and productivity while improving the environmental sustainability of their farms.

CPSA does this by:

- Being an inclusive platform for networking and information exchange.
- Prompting sectoral or market systems transformation through its Working Groups.
- Providing education and advisory for SMEs, entrepreneurs and farmer organizations.
- Supporting sustainable smallholder agricultural development.

www.cpsa-growasia.org

Partnership for Indonesia's Sustainable Agriculture

Working groups:

- | | |
|----------------------|---------------------|
| Agri-Finance and ICT | Palm Oil |
| Beef | Potato |
| Cocoa | Rice |
| Coffee | Rubber |
| Corn | Soy |
| Dairy | Vocational Training |
| Horticulture | |

Partners:

85

Officially established in 2012, the Partnership for Indonesia's Sustainable Agriculture (PISAgro) is a public-private partnership that was created in response to challenges and opportunities facing the agriculture sector in Indonesia. Through its activities, the partnership seeks to provide an innovative, multi-stakeholder model for addressing the nation's agricultural challenges in a sustainable manner while improving the livelihoods of smallholder farmers.

PISAgro now has 85 partners – consisting of national and multinational companies, NGOs, donors and other institutions – working across 13 Working Groups.

www.pisagro.org



Myanmar Agriculture Network

Working groups:

-  Agri-Finance
-  Pulses & Oilseeds
-  Agri-Inputs
-  Rice
-  Aquaculture
-  Sugar
-  Coffee
-  Tea
-  Corn
-  Horticulture
-  Mobile Services & Technical Extension

Partners:

123

The Myanmar Agriculture Network (MAN) brings together companies, government agencies, civil society organizations, farmer groups and financial institutions to link smallholder farmers to the market with the shared goal of increasing farmers' profits and productivity while improving the environmental sustainability of their farms.

MAN does this by:

- Being an inclusive platform for networking and information exchange.
- Prompting sectoral or market systems transformation through its Working Groups.
- Serving as a resource hub for MSMEs, entrepreneurs and farmer organizations to reach global markets.
- Supporting sustainable and pro-smallholder agricultural development.

www.man-growasia.org

Grow PNG

Launched in 2019, Grow PNG is based in Lae, Papua New Guinea, the gateway to the Markham Valley agricultural corridor. The Country Partnership will bring together business leaders, policy makers and farmers to collaboratively unlock growth in the sector and facilitate new opportunities for farming families.

Grow PNG aims to accelerate the growth of the agriculture sector in the Markham Valley by enabling smallholder households to increase their income by 20% within eight years.

Grow PNG will do this by:

- Building effective Working Groups addressing collective challenges and unlocking growth through policy changes, new partnerships and new business models.
- Strengthening partnerships and increased trust between civil society, government, agribusiness and farmers.
- Improving knowledge and information.

www.growpng.org





Philippines Partnership for Sustainable Agriculture

Working groups:

-  Coconut
-  Coffee
-  Corn
-  Fisheries
-  Vegetables
-  Agricultural Finance
-  Learning Alliance

Partners:

60

The Philippines Partnership for Sustainable Agriculture (PPSA) was formally launched in 2015 by the Philippines' Department of Agriculture and Grow Asia. PPSA serves as a multi-stakeholder platform to engage smallholder farmers and market players towards social-economic growth and competitive advantage.

Today, the PPSA has 60 partners organized around five commodity-based Working Groups and two cross-cutting themes.

www.ppsa-ph.org



Partnership for Sustainable Agriculture in Vietnam

Working groups:

-  Agrochemicals
-  Livestock
-  Coffee
-  Pepper
-  Fisheries
-  Rice
-  Fruits & Vegetables
-  Tea

Partners:

120

The Partnership for Sustainable Agriculture in Vietnam (PSAV) brings together companies, government agencies, civil society organizations, farmer groups and financial institutions to link smallholder farmers to the market with the shared goal of increasing farmers' profits and productivity while improving the environmental sustainability of their farms.

PSAV's objectives are:

- Promoting sustainable agricultural practices, standards and policies in Vietnam.
- Facilitating Public Private Partnerships between the Ministry of Agriculture & Rural Development (MARD) and other government agencies, international organizations and the private and social sectors for sustainable agriculture.
- Contributing to the development of science-based regulations and compliance for sustainable development.
- Disseminating up to date, trustworthy information on sustainable development and farming practices.

www.psav-mard.org.vn

Supporting Innovation

Digital

Grow Asia's conversations with agriculture leaders in Southeast Asia have revealed they believe digital technologies – such as tools for finance, logistics and learning – are set to positively transform the way smallholders interact with agribusiness. These tools have the potential to bring greater efficiency to value chains by significantly lowering transaction costs, while improving farmers' prosperity.

Across six complementary initiatives, Grow Asia brings together business leaders, development actors and policy makers to accelerate the adoption of digital tools.

Digital Learning Series

growasiaseries.com

This series provides trainings and insights on how digital solutions can be developed and scaled. Themes have included digital credit scoring, traceability, drones and application development. In 2019 we will run six events in Singapore and present the option of dialing in for those from across the region.

Grow Asia Hackathon

growasiahackathon.com

This event engages entrepreneurs to build digital solutions for smallholder value chains. In 2018, the event brought together 120 digital experts to interact with processors, NGOs, industry mentors and 20 oil palm farmers. 22 teams of tech entrepreneurs and start-ups from Singapore created innovative data-driven solutions resolving real-life farming challenges.



Digital ASEAN

digitalasean.tech

A start-up Accelerator, developed in partnership with Yara and MUFG bank, to equip start-up founders to scale their smallholder digital solution. In 2018, the accelerator attracted applications from 45 start-ups, which were then shortlisted to 15, who pitched their ideas to the Accelerator committee. Seven were accepted as having potential for smallholder value chains and are being taken through a mentoring and field testing/evaluation process.

Grow Asia Digital Directory

growasiadirectory.org

A database of over 60 (and counting) agricultural digital solutions that are gaining traction in ASEAN. Digital solutions cannot transform the sector if investors, agribusiness and development actors don't know what solutions are available. This directory fills that gap; providing not only information on solutions but also contact details so new partnerships can emerge.

Human Centred Design (HCD) Training

Grow Asia invited startup founders and corporate leaders on a three-day immersion in a rural location to meet with farmers and learn the fundamentals of HCD to benefit value chains. The training provided participants with a toolkit to map smallholder challenges and build digital solutions that address actual needs in value chains.

Digital Guides

We produce comprehensive guidance on digital themes for business leaders, such as a Digital Credit Scoring Guide.

Policy

While Grow Asia is not a policy advocacy group, the Secretariat actively engages government officials at all levels of seniority to ensure our Country Partnerships are aligned with national and regional strategic agendas.

Benchmarking

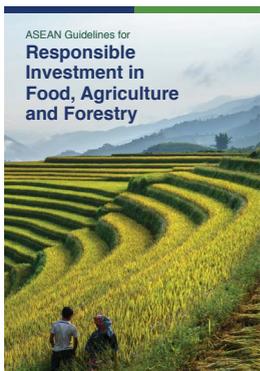
To enable our approach to become more effective, Grow Asia has commissioned a review of the agricultural policies of ASEAN countries. This work has created a database of contacts, agencies and their roles. This will become a core tool for Grow Asia partners to take a more strategic, informed, and focused approach to policy engagement.

Collaboration with the ASEAN Secretariat

As a result of Grow Asia’s expertise in convening multi-stakeholder partnerships, the ASEAN Secretariat requested Grow Asia’s support in developing the ASEAN Guidelines on Promoting Responsible Investment in the Food, Agriculture and Forestry sector.

The Guidelines aim to promote investment in the ASEAN region that contribute to regional economic development, food and nutrition security, food safety and equitable benefits, as well as the sustainable use of natural resources. They cover 10 areas of best practice.

The Guidelines are primarily aimed at the public sector in ASEAN, including governments, subsidiary agencies, institutions and regional bodies. They were developed by Grow Asia with support from the ASEAN Secretariat, The Swiss Agency for Development and Corporation (SDC), a World Bank Trust Fund and the International Institute for Sustainable Development (IISD), with input from Grow Asia partners and stakeholders through a consultative process.



Sharing Learnings

Grow Asia has a strong commitment to facilitating learning. This agenda covers the development and exchange of both project and process-based knowledge emerging from within the network. By highlighting successes and sharing learnings, Grow Asia hopes to catalyze greater impact to improve smallholder livelihoods.



Case Studies

Case studies offer invaluable opportunities for new and existing Working Groups to learn from successful projects. Each case study provides (1) an overview of stakeholders involved, key activities, project milestones and initial results; and (2) an outline of the journey, which charts the project's design and implementation. These case studies showcase the benefits of working in a partnership and facilitate the design and implementation of successful multi-stakeholder projects.

To date, Grow Asia has commissioned seven case studies on existing projects, available at:

exchange.growasia.org and growasia.org/knowledge-sharing



Grow Asia Exchange

The Grow Asia Exchange is an online knowledge repository and learning hub that bridges expertise across a variety of disciplines. It enables partners to learn from one another's experiences, share best practices, and gain access to practical knowledge on inclusive value chain projects. The Exchange hosts information such as case studies, research papers, and value chain analyses.

exchange.growasia.org



Learning Alliance

There is a plethora of research being led and conducted in ASEAN – but the fragmentation of different sources of research expertise makes it difficult for valuable findings to be applied in agriculture value chains. Concurrently, there are missed opportunities for Knowledge Producers (KPs) – research institutes, universities, think tanks – to leverage one another’s research and experience.

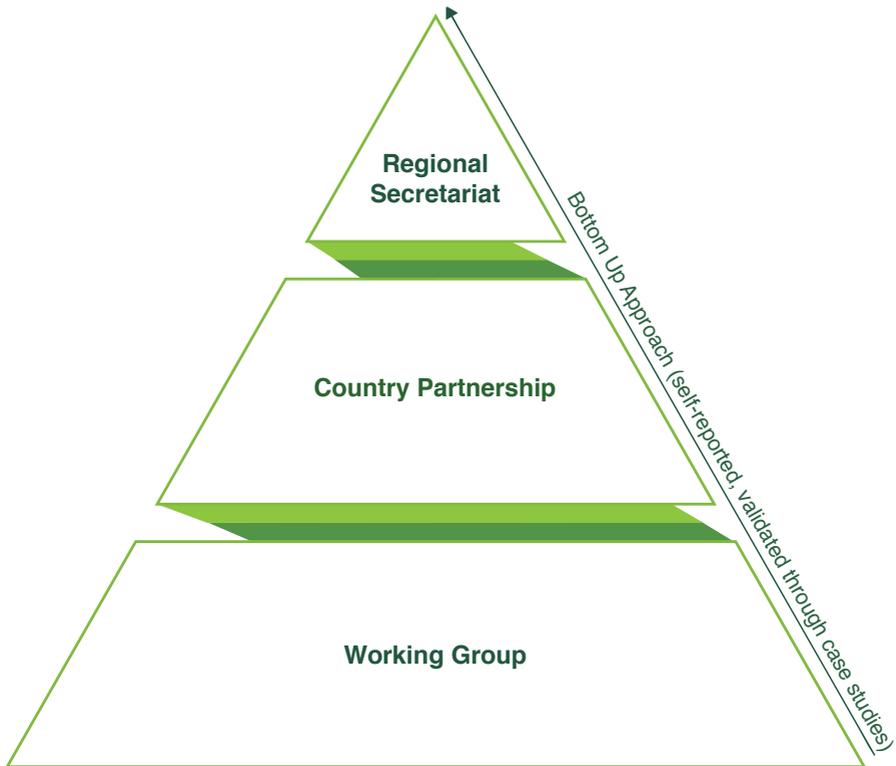
With funding from the International Development Research Centre (IDRC), the Grow Asia Learning Alliance (GALA) Program was established to address this issue and further promote action-oriented research by developing a systematic approach to knowledge sharing between stakeholders in agriculture value chains. We achieve this by helping KPs connect with stakeholders in the value chain, while providing training and development opportunities to better articulate research to business audiences.

The objective is to translate research findings into market opportunities and encourage greater incorporation of best practices and the adoption of cutting-edge research. This will facilitate more strategic, targeted corporate action. Aligned with Grow Asia’s broader mandate, the GALA program strives to support value chains in creating more and better employment in agriculture so a greater number of smallholders can benefit from expanding economic growth in Southeast Asia.

To date, a Learning Alliance Working Group has been formally established in the Philippines, a series of learning events has been run in Myanmar, and there are plans in place to launch a regional training program covering the Philippines, Indonesia, and Vietnam.

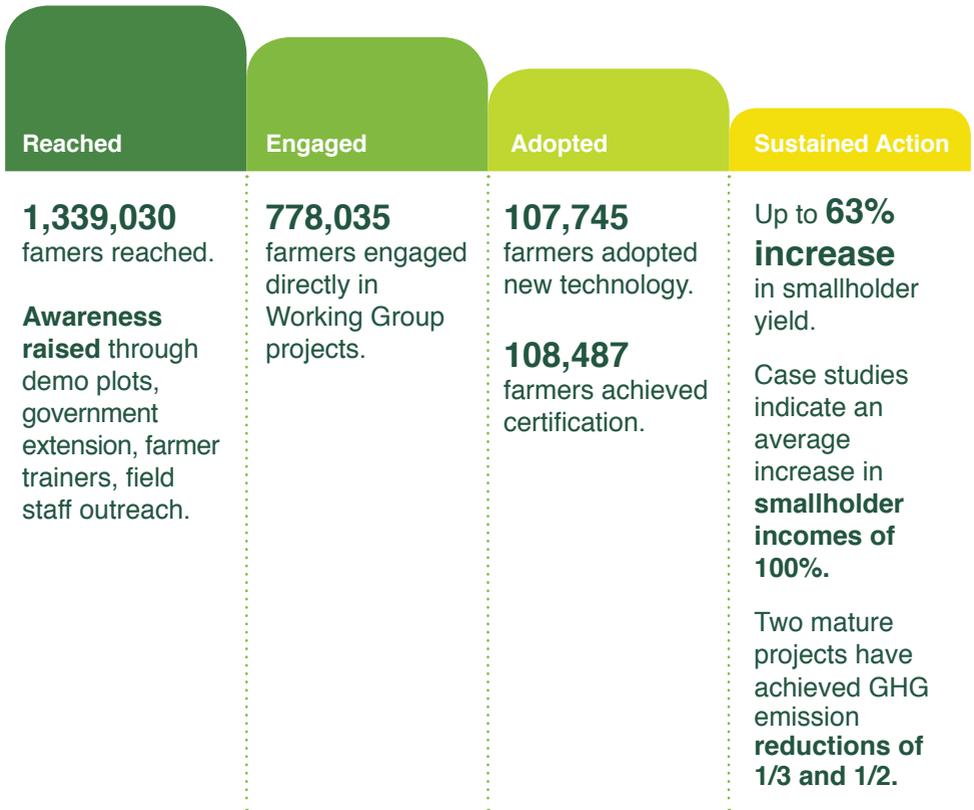
Measuring Performance

To measure performance of the Grow Asia network as a whole, we now use a three-pronged approach which includes a Partner Survey, a Country Partnership Scorecard and a Working Group Scorecard. The Partner Survey computes the value of the services being offered by Grow Asia Secretariat. The Country Partnership Scorecard measures the annual progress of the Country Secretariats by evaluating them according to four qualitative measures: financial independence and stewardship, organizational capacity, stakeholder engagement and quality of Working Groups and impact. The Working Group Scorecard evaluates the Working Groups in the network based on their structure, strategy, impact and facilitation capabilities.



Farmer Engagement Funnel

Grow Asia introduced the Farmer Engagement Funnel as a framework to communicate results gathered from various activities and interventions throughout the network. The Funnel highlights the different levels of engagement that projects have with smallholder farmers, such as reach, engagement, adoption and sustained activity. At the broadest end, projects generally reach larger numbers of farmers but with minimal engagement, such as visits to demonstration plots and general awareness about the project. As the funnel narrows, projects reach a smaller number of farmers but create deeper levels of engagement with those farmers through the provision of training, inputs and offtake agreements.



Convene and Broker Partnerships



Grow Asia's highest-profile regional event is the Grow Asia Forum. Held together with the World Economic Forum on ASEAN Summit, it brings together senior leaders from ASEAN governments, global and regional private sector, international civil society, farmers' organizations and other key stakeholders. The Grow Asia Forum 2018 took place in Hanoi, Vietnam, and attracted 163 delegates from 19 countries. In attendance were nine Ministers/Vice Ministers, 20 CEOs (10 from MNCs and 10 from national or start-up companies), as well as 20 senior representatives of NGOs and farmer organizations. To build on the previous years' lessons, the Grow Asia Forum 2018 launched a Knowledge Marketplace and offered participants case studies in agricultural technologies, creative solutions and resources. A full report of the outcomes and highlights is available on the Grow Asia website.





Learning & Networking Events

Learning is cited by Grow Asia’s partners as their top reason for participating in the network. Grow Asia has a sophisticated portfolio of learning events and covers both explicit knowledge (fact-based knowledge such as case studies, market opportunities, production and post-harvest innovations) and implicit knowledge (the knowledge derived from experience). In 2018, Grow Asia and our Country Partnerships organized 50 learning events, drawing an aggregate of 1,153 participants.



Secretariat Workshop

Between 30 Jan – 1 Feb 2019, Grow Asia hosted our annual Country Partnership Secretariat Workshop in Singapore. The Workshop brought together Secretariats from Cambodia, Indonesia, Papua New Guinea, the Philippines, Myanmar and Vietnam to exchange knowledge and experiences to help develop Country Partnership plans and projects. The Workshop’s agenda was designed to discuss in detail the Country Partnerships’ structure, Working Groups, partners and government support and engagement to facilitate better understanding amongst the Secretariats.

Governance and Structure

Grow Asia has a unique governance structure that is reflective of our multi-stakeholder approach. Our Steering Committee guides and oversees Grow Asia's strategy and operations. The Grow Asia Business Council, comprised of global and regional companies, provides strategic insight and drives action on the ground, while the Grow Asia Civil Society Council advises on ensuring positive societal and environmental outcomes.

Steering Committee

The multi-stakeholder Steering Committee acts as the main oversight body for the Grow Asia Secretariat. The Committee's diverse representation, including a farmer representative, is invaluable in defining Grow Asia's plans and addressing differing views and approaches while identifying priority areas that help Grow Asia meet its ambitious targets.

Members

- ASEAN Secretariat
- Representatives of the Grow Asia Business Council
- Representatives of the Grow Asia Civil Society Council
- Farmers' Associations
- Donors
- World Economic Forum

Business Council

The Grow Asia Business Council includes the CEOs and regional heads of local and global companies. Member companies lead Country Partnerships, invest in value chains, and support the development of innovative solutions.

Co-chairs

- Bayer CropScience
- Sinar Mas Agribusiness & Food

Members

- Bunge Ltd.
- Cargill Inc.
- Charoen Pokphand Produce Co., Ltd.
- Corteva Agriscience
- Heineken
- International Finance Corporation
- Jain Irrigation Systems Ltd.
- Louis Dreyfus Company
- Nestlé SA
- PepsiCo Inc.
- Rabobank
- RGE Pte. Ltd.
- Royal DSM
- Swiss Reinsurance Company Ltd.
- Syngenta International AG
- Unilever
- UPL Ltd.
- Wilmar International Ltd.
- Yara International ASA

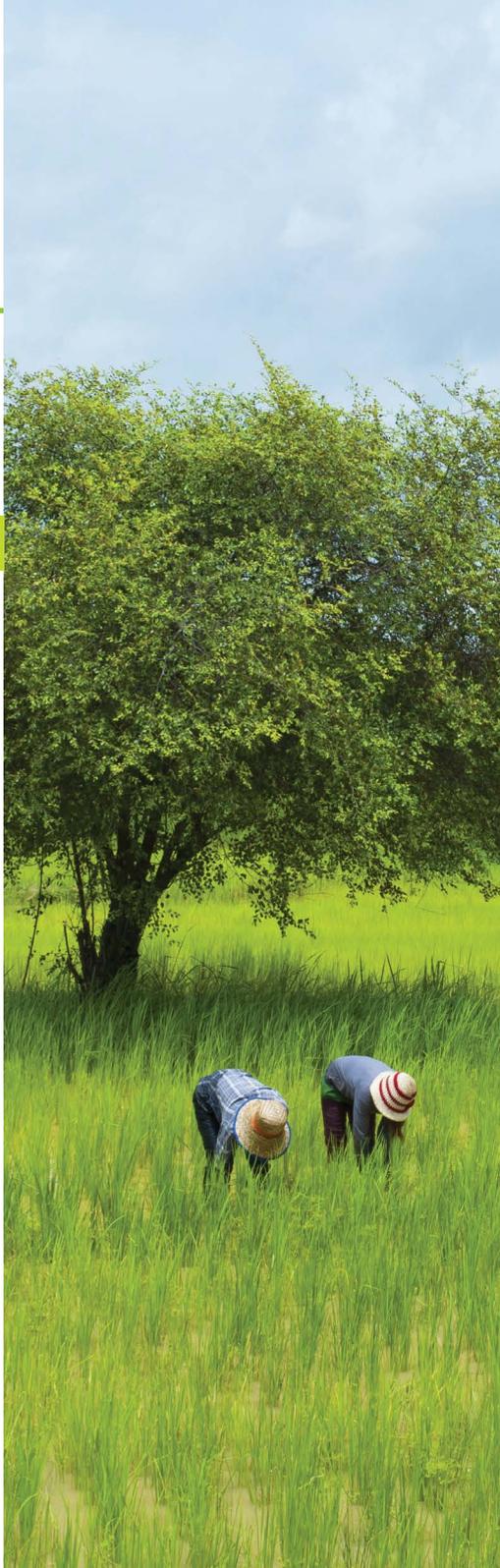


Civil Society Council

Local and global NGOs make up the Grow Asia Civil Society Council. The members provide active guidance, including the development of a project design checklist, reviewing the Grow Asia performance measurement metrics, commissioning specific research in support of Grow Asia's projects, and partnering directly with projects on the ground.

Members

- Agriterra
- AsiaDHRRA
- Asian Farmers' Association for Sustainable Rural Development (AFA)
- Conservation International
- Landesa
- Mercy Corps
- Oxfam
- Rainforest Alliance
- SNV
- Sustainable Trade Initiative (IDH)
- Swisscontact
- The Nature Conservancy
- World Vision Australia
- World Wide Fund for Nature (WWF)



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Inclusive Business
Action Network



Deutsche Gesellschaft
für Internationale
Zusammenarbeit (GIZ) GmbH



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Agency for Development
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