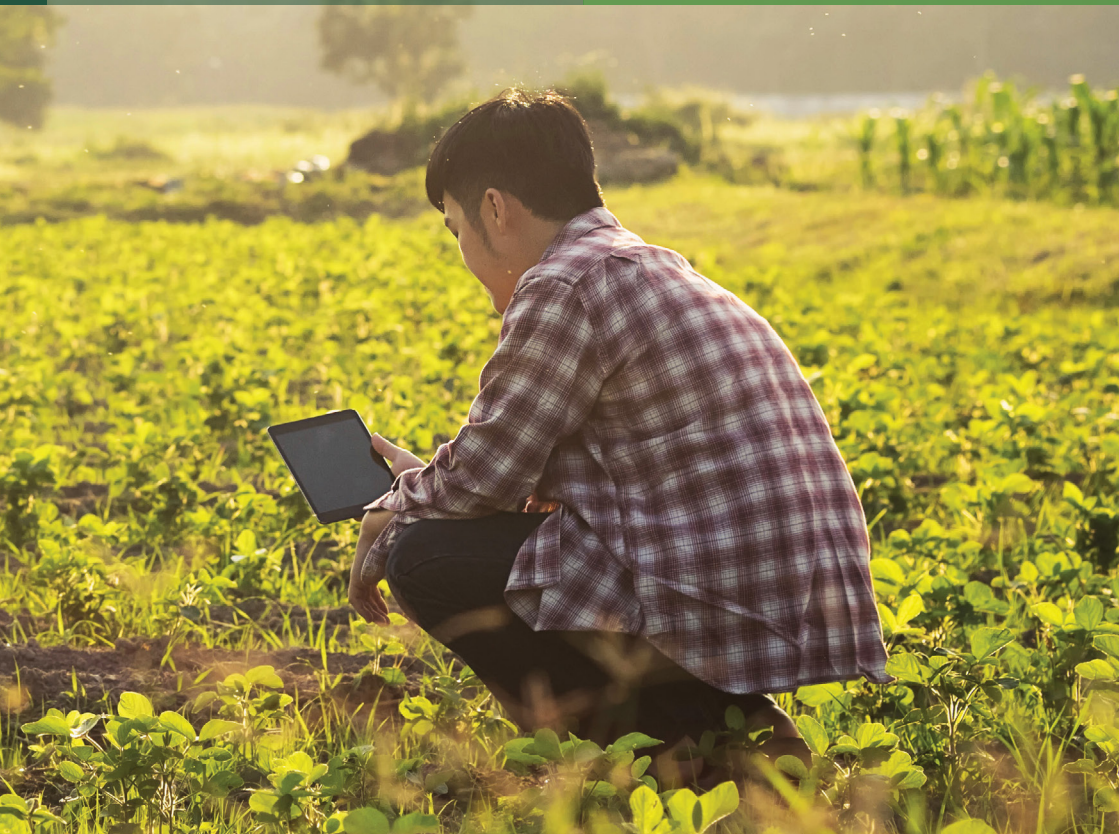
GrowAsia

Report on Progress

2018



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Overview

South East Asia is home to 600 million people and experiencing vibrant and fast-paced growth. A key theme in the region is that, on average, more than half the population lives in rural areas and primarily depends on the agriculture sector for income. 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. Millions of people have been lifted out of poverty, yet a third of the population still live on less than US$2 a day and food security remains high on the agenda.

Grow Asia brings together South East Asia's smallholder farmers, governments, companies, NGOs, and other stakeholders, to develop inclusive and sustainable value chains and initiatives. At Grow Asia's core are three goals – to increase the productivity, profitability and environmental sustainability of smallholder agriculture across the region by helping them access knowledge, technology, finance and markets. It launches and supports locally-driven Country Partnerships, helping them define their strategy, engage new partners and develop innovative solutions.

Grow Asia enables stakeholders from different disciplines to leverage each other's expertise, share insights and learn from regional experiences. Today, Grow Asia collaborates with over 500 partners across five Country Partnerships, reaching over 690,000 smallholders through our network.

Grow Asia was established by the World Economic Forum, in collaboration with the Association of Southeast Asian Nations (ASEAN) Secretariat, to convene, facilitate, and help scale action-focused partnerships. Building on the experience and success of the Forum's New Vision for Agriculture (NVA) initiative, which supports multi-stakeholder partnerships across the world focused on agriculture development to deliver food security, environmental sustainability, and economic opportunity.

Impact

Country Partnerships supported	Grow Asia partners	Working Groups supported	Value chain projects	Smallholder farmers reached
5	480+	44	37	690,710

Preface

Over the past three years, the Grow Asia partnership has made significant progress. Our network of five Country Partnerships now convenes over 500 partners across the public, private and civil society sectors, involving them in 44 locally-led Working Groups.

While we have made a promising start, Grow Asia is still on a journey. With Secretariats in each of the five countries, we are now placing a greater emphasis on achieving results at scale and are guided by a refined Twin-track strategy.

Under Track One, our focus is on creating resilient and sustainable multi-stakeholder partnerships to deliver economic and environmental benefits to smallholder farmers. To do so, over the last months we have continued to guide our Country Secretariats to become more professional and self-financing, able to engage their governments, deliver effective Working Groups, and also able to take on roles in improving food systems and responding to the Sustainable Development Goals (SDGs). We have also doubled the numbers of Country Partnership staff, and expect to double this again over the next year.

Track Two aims to build on the unique reach of the network to effect regional change. This focus is born from key lessons learned over the last year which indicate that if Grow Asia is to achieve even more widespread impact in addition to the individual value chain projects, the network will need to broaden its scope of activity. Included in this agenda is closer policy dialogue and government engagement, new approaches to agricultural finance and insurance, improved cross-regional knowledge exchange, promoting a stronger role for women in agriculture, and our digital program – more details of which we have shared within this Report on Progress.

The next twelve months are going to be exciting for Grow Asia and agriculture in South East Asia. Most of the network's projects are in the early stage of development and delivery – so there is much in the pipeline. Encouragingly, those that have reached scale bear impressive results and reach one or more of Grow Asia targets of increasing smallholder profitability, productivity and environmental sustainability. Furthermore, our expanding work into digital offers the possibility of radically improving the potential relationship between smaller scale producers and agribusinesses; our involvement in policy may very well emerge as an extremely cost-effective way of operating, offering the potential of long term and large-scale impact; and our work in agri-finance have demonstrated that there are uniquely impactful approaches than can be utilized to bring additional finance to smallholders in the region.

We are, of course, thankful for the continued support from all our partners and remain inspired by their passion and drive to promote more inclusive and sustainable value chains that support smallholders in the region. We are grateful for the strategic guidance that our various committees and Working Groups have provided over the past year and the continued support of the World Economic Forum's New Vision for Agriculture and ASEAN Ministers of Agriculture.

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 World Bank, the Swiss Agency for Development and Cooperation and Canada's International Development Research Centre.

Grahame Dixie
Executive Director
Grow Asia



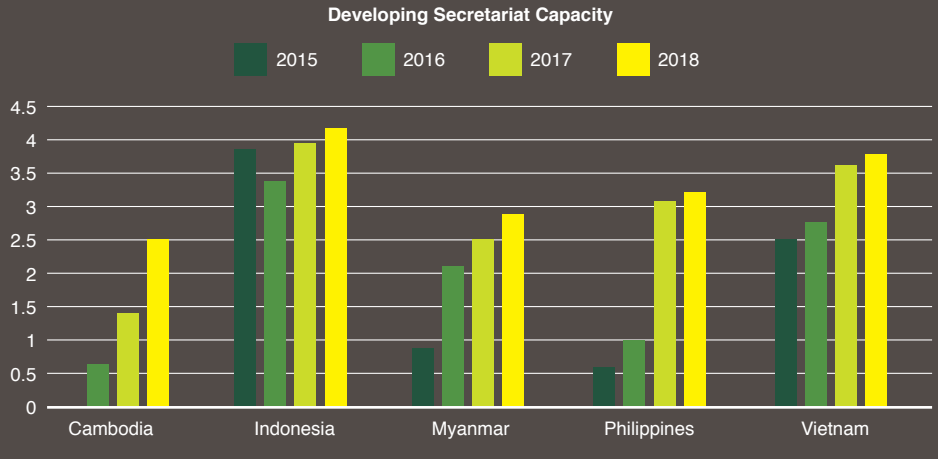
Building Strong and Effective Country Partnerships

The World Economic Forum and Grow Asia have catalyzed Country Partnerships in Indonesia, Cambodia, Vietnam, Myanmar, and the Philippines staffed by local employees 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, inputs of private sector partners, and the unique economic and cultural environment in each country. Therefore, the Country Partnerships are also at various levels of progress on their governance and activities.

The diagram below demonstrates each Country Partnership and the level of its activities compared to the previous year. This model is based on a qualitative assessment carried out by Grow Asia in collaboration with the Country Partnership Secretariats and Staff, and looks at:

(1) their financial independence and stewardship,
(2) organizational capacity,
(3) stakeholder engagement and
(4) quality of working groups and impact.



CPSA PISAgro Myanmar Agriculture Network PPSA PSAV

Cambodia Partnership for Sustainable Agriculture

Working Groups:

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

Partners:

28

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 farmerorganizations

Supporting **sustainable smallholder agricultural** development

www.cpsa-growasia.org

Partnership for Indonesia's Sustainable Agriculture

Working Groups:

- Agri-Finance
- Beef
- Cocoa
- Coffee
- Corn
- Dairy
- Horticulture
- Palm Oil
- Potato
- Rubber
- Soy Bean
- Vocational Training

Partners:

79

The Partnership for Indonesia's Sustainable Agriculture (PISAgro) was first announced by the Vice Minister of Agriculture and Vice Minister of Trade during the World Economic Forum on East Asia in Jakarta, in June 2011. Officially established on 20 April 2012, PISAgro is a public-private partnership that was created in response to challenges and opportunities facing the agriculture sector in Indonesia. Instead of "Vision 20-20-20" which aims to increase farm yields by 20%, reduce poverty by 20% and reduce greenhouse gas emissions by 20%, 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 more than 70 partners, consisting of national and multinational companies, NGOs, donors and other institutions across its 12 Working Groups focused on 10 crops and commodities, and 2 cross-cutting themes.

www.pisagro.org

Myanmar Agriculture Network

Working Groups:

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

Partners:

121

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

Providing **education and advisory** for SMEs, entrepreneurs and farmer organizations

Supporting **sustainable and pro-smallholder** agricultural development

www.man-growasia.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. In 2017, Grow Asia collaborated with the Philippine Business for Social Progress (PBSP), a business-led social development organization committed to poverty reduction, to establish the PPSA Secretariat as an in-country coordinating body.

Five Working Groups organized around coconut, coffee, corn, fisheries and vegetables are currently in place and are developing ways to transform their sectors beyond individual value chain projects. In addition, partners are also collaborating on cross-cutting themes of agricultural finance and knowledge sharing. Grow Asia will continue to provide overall strategic direction and support to PPSA locally and regionally.

www.ppsa-ph.org

PSAV

Partnership for Sustainable Agriculture in Vietnam

Working Groups:

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

Partners:

76

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 standards, policies and best farming practices in Vietnam

Facilitating partnerships between the Ministry of Agriculture & Rural Development (MARD) and other government agencies, international organizations and civil society organizations (public private partnerships) for sustainable agriculture

Contributing to the development of science-based regulations and compliance for sustainable development

Disseminating updated and trustworthy information on sustainable development and farming practices.

www.psav-mard.org.vn



Supporting Innovation

Grow Asia is committed to supporting partners in unlocking the potential of innovative tools and ways of working. We believe this is crucial to further the networks' progress toward our shared goals around increasing smallholder productivity, profitability and environmental sustainability.



Digital

Digital solutions offer the possibility of radically changing the relationship between smaller scale producers and agribusinesses, both fundamentally and positively. It is also a space littered with failed investments and rapidly changing technologies. The feedback from our partners highlighted their keen interest in learning more about high-impact digital solutions and examples of success in the space.

Consequently, Grow Asia has initiated its Digital Learning Series to act as a launch pad to encourage the testing, dissemination, and wide-spread uptake of digital tools. This has moved on to a highly successful hackathon – where multiple solutions, such as chat-bots, digital credit scoring schemes and mechanisms for reducing post-harvest losses - were sketched out. As a result, four major companies have since stepped forward with the financing to test these ideas in the field.

Grow Asia's experience is that digital technologies, particularly when combined with finance, offer one of the best prospects of scaling our impact. Our work around digital is emerging as an example of how the Grow Asia Secretariat is uniquely able to add value beyond our initial role in convening partnerships and to extend those learnings across the region.

Agri-Finance

Grow Asia believes that access to finance is a key enabler for smallholder farmers and has been playing an active role in the Philippines since late 2016.

PPSA and Grow Asia, in cooperation with the Bank of the Philippine Islands Foundation and PinoyME Foundation, organized the country's first AgriFinancing Summit. The event brought together stakeholders from the public and private sectors to address impediments to smallholder access to finance and identify policy reforms. Grow Asia then supported the formation of an Inclusive Agricultural Value Chain Consortium to serve as a platform for exchanging information, brokering transactions, and documenting learnings from value chain finance models.

The Consortium has successfully brokered working capital/production loans to farmer cooperatives and SMEs with an aggregate value of PHP6 million (USD $120,000). To further scale impact, the Consortium researched and published successful value chain financing models. Future research agenda include a guidebook/toolkit on value chain finance, which contain practical guidelines, policies, and templates for replication and scaling.



Government Engagement

Grow Asia actively engages government officials at all levels of seniority and works with them to ensure that the Country Partnerships are aligned with national and regional strategic agendas.

At the 39th meeting of ASEAN Ministers of Agriculture and Forestry (AMAF) in September 2017, ASEAN Member States (AMS) adopted six key deliverables of the ASEAN Cooperation on Food, Agriculture and Forestry (FAF) for 2018. One of the key deliverables was to develop ASEAN Guidelines on Promoting Responsible Investment in Agricultural Sector. As a result of Grow Asia's expertise in convening multi-stakeholder partnerships, The ASEAN Secretariat requested Grow Asia's support in (1) Coordinating with external technical consultants, private sector, farmer organizations and civil society, (2) Assisting in obtaining funds for the project and (3) Participating and conducting consultation workshops, meetings and trainings. The ASEAN Secretariat also stressed that they wanted Grow Asia to assist them in bringing a wider range of voices—especially from the private sector—to ASEAN's consensus-driven processes.

Following widespread consultation with over 100 stakeholders from across ASEAN - including 2 workshops held in Bali, Indonesia and Singapore through funds raised from the Swiss Agency for Development Cooperation (SDC) and The World Bank - the guidelines are in the process of being reviewed and approved by the ASEAN Technical Working Group on Agriculture and Research Development (ATWGARD). It is expected that the ASEAN Guidelines will be adopted by the AMAF by October 2018 and will, in time, form the foundation of regional thinking about how larger scale agribusiness investments can be used to create inclusive, sustainable business models.

The examples above demonstrate the potential effectiveness of working in the policy environment. While the Grow Asia Secretariat is not a policy advocacy group, its role is to create a platform for the Country Partnerships' voice to be heard at national and regional policy dialogues.

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



Sharing Learnings

Grow Asia has a strong commitment to facilitating learning. This agenda covers the development and exchange of both explicit knowledge (e.g. fact-based knowledge such as case studies, market opportunities, production and post-harvest innovations) and implicit knowledge (i.e. the knowledge derived from experience) 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 has two components: a business model that provides an overview of stakeholders involved, key activities, project milestones and initial results; and a journey document that charts the Working Group's journey in project design and implementation. Together, the 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 five case studies on existing projects and a market study on the palm sugar and coconut sugar sectors in South East Asia. These are available on the Grow Asia Exchange.

Recently, Grow Asia has also launched a series of two-page documents – our "stories" - to showcase some of our networks' projects from across the region and the impact they have had for smallholder farmers. They were developed to display learnings and successes in a bite-sized format. This story bank will continue to grow as the network expands and scales it works.

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. The Exchange also features online communities that allow Grow Asia partners to engage and share resources virtually.

Learning Alliance

Through facilitating multi-stakeholder partnerships, over the last three years Grow Asia has had significant success supporting smallholder farmers to increase farm productivity, profitability, and environmental sustainability. However, to achieve greater scale, Grow Asia is working to promote a more systematic approach to knowledge sharing across South East Asia via the creation of a Grow Asia Learning Alliance (GALA).

While a select group of our partners may have pre-existing relationships with one or two knowledge producers, there is no easy way in which they can access the wealth of research that is being conducted in South East Asia. In creating a GALA which links our partners to the leading research institutes and think tanks in the region, we will facilitate the translation of research findings into market opportunities for the smallholders in South East Asia.

The program is currently being piloted in the Philippines and Myanmar, with plans in place to expand regionally.



Women in Agriculture



Highlights from the Grow Asia roundtable at the Responsible Business Forum

A core part of Grow Asia's strategy to advance the productivity, incomes and sustainability of smallholders in South East Asia is to increase the range and suitability of choices offered to women by businesses. This requires innovation and investment based on an understanding of the influence of gender in the marketplace. This is where Grow Asia's partners and stakeholders will be critical in engaging with the issue and mobilizing greater action.

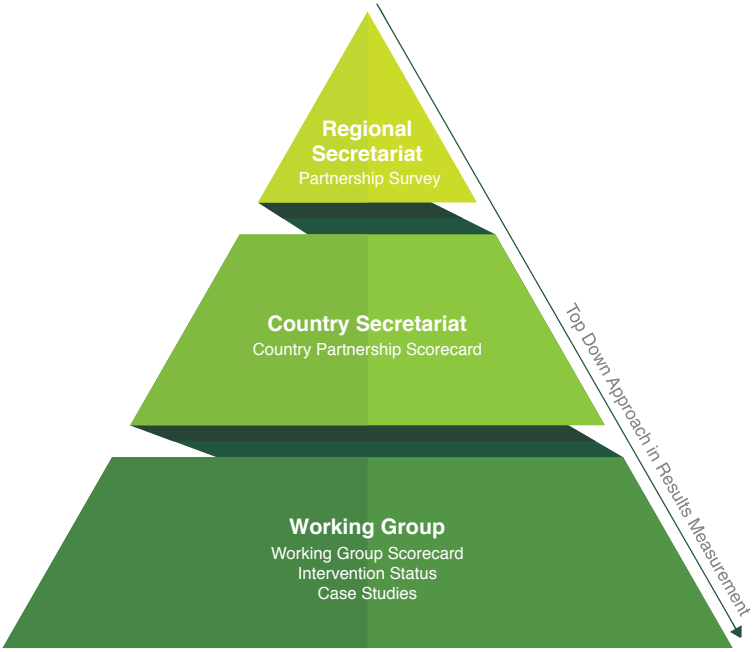
Following Grow Asia's 2017 report on the agricultural gender gap, Grow Asia hosted a discussion at the 2018 Responsible Business Forum on Food and Agriculture in Jakarta to review progress and continue to give attention to this important topic. This year's conversation moved to specific strategies for women's economic empowerment and the identification of cultural challenges and tactics. A consistent theme was the importance of inclusiveness – ensuring that it is women training women, women incorporated in business data and measurement, and women involved in early stage conversations.

Performance Measurement

Over the coming year, Grow Asia will continue to drive this topic as a focus in discussions with our partners and empower them to identify opportunities for change.

Measuring our Performance

To measure the performance of Grow Asia 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 our Intervention Status reports. 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.



Reached

- 690,710 famers reached
- Awareness raised through demo plots, government extension, farmer trainers, field staff outreach

Engaged

- 417,993 farmers engaged directly in Working Group projects
- 255,994 hectares of land

Adopted

- 81,782 farmers adopted new technology and practices

Sustained action

- Up to 52% increase in smallholder yield
- Up to 80% increase in smallholder incomes
- Two projects have achieved GHG emissions of between 1/3 and 1/2

Data Collection Tools for Partners

Grow Asia strives to support the Working Groups and Country Partnerships in the performance measurement process.

The **Measurement Guide** is a template provided to various Working Groups for monitoring the progress of interventions. The data from the template assists Working Groups to gain positive visibility through data sharing, developing more effective business approaches, understanding business development costs and communicating results to stakeholders in a systematic manner.



Convene and Broker Partnerships



Grow Asia **Forum**

On 10 May 2017, the Grow Asia Forum was held in Phnom Penh, Cambodia and convened more than 120 senior leaders from across South East Asia, including representatives from government, farmer organizations, business and civil society. The delegates came together to make strategic decisions and commitments that would strengthen outreach to smallholder farmers and help ensure the sustainability of food systems. The high-level event focused on advancing opportunities for collaboration will enable scaling strategies to be implemented. Leaders also discussed future plans to develop digital interventions which would provide farmers with access to good agricultural practices and market information. Commitments to further strengthen in-country secretariat support were made, and other key issues such as women in agriculture and access to finance were also discussed. A full report of the outcomes and highlights is available on the Grow Asia website.



Grow Asia **Practitioners' Workshop**

The Grow Asia Secretariat hosted its second annual Practitioners' Workshop on 11-12 October 2017, in Jakarta, Indonesia. The event brought together more than 70 partners from the government, private sector, NGOs and farmers to share their experiences across crops and countries, and co-develop solutions to improve the scale and sustainability of the impact derived from Country Partnerships. The agenda was designed to be collaborative and encouraged relationship building, allowing partners across Grow Asia's five Country Partnerships to deepen their ties with colleagues around the region and facilitate improved knowledge sharing and networking. Conversations during the two-day event created opportunities to identify the areas where action is needed. A full report of the outcomes and highlights is available on the Grow Asia website. To further increase the impact of these Workshops', in 2018 Grow Asia held five in-country events. We hope this will allow us to reach a wider audience and tackle the issues most relevant to each country.



Secretariat Workshop

On 4-6 April 2018, Grow Asia hosted a Country Partnership Secretariat Workshop in Singapore. The Workshop brought together Secretariats from Cambodia, Indonesia, Philippines, Myanmar and Vietnam who were joined by the Grow Asia team 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's multi-stakeholder governance structure was formalized in the first year of operation. This structure is designed to provide the Grow Asia partnership with strategic leadership across its various channels of operation.

Grow Asia **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
Grow Asia Business Council
Grow Asia Civil Society Council
Farmers' Associations
Donor Governments
World Economic Forum

Grow Asia **Business Council**

The Grow Asia Business Council includes the CEOs and regional heads of 20 local and global companies that are partners of the World Economic Forum. 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.
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

Grow Asia **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

Conservation International

Landesa

Mercy Corps

Rainforest Alliance

SNV

Sustainable Trade Initiative (IDH)

Swisscontact

World Vision Australia

World Wide Fund for Nature





Engage

www.growasia.org

info@growasia.org

Grow Asia
74B Tras Street
Singapore
079013

+65 6805 4020

