Overview of New ACIAR Project
AGB/2016/196: Sustainable and Inclusive Development of the Cattle and Beef Industry in South-East Asia and China

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Key Information

• 4 year collaborative research project (2017-2021)
• Budget AUD1.8 million
• Covers cattle and beef sector across South-East Asia and China, with a detailed concentration in Myanmar and Vietnam
• Key Partners in Myanmar – LBVD, YAU
• Key Partners in Vietnam – IPSARD, CIS
• International Partners – University of Queensland, International Food Policy Research Institute (IFPRI), HELVETAS Swiss Intercooperation
• Network partners in China, Lao PDR, Cambodia, Thailand, Indonesia, Timor Leste
The aim of the project is to generate relevant and timely information to support policy makers develop trade and industry policy for the beef sector in South-East Asia and China. The project will contribute to the higher level goal of supporting sustainable and inclusive improvements the livelihoods of smallholders and other smaller scale participants in live cattle and beef value chains.
Project objectives

1. To examine current and future trends in global and regional beef markets and trade through statistical analysis and modelling.

2. To evaluate impacts on smallholders and other chain actors at country level and analyse appropriate policies for trade, industry development and rural development through comparative and case study analysis.

3. To support engagement, share knowledge and exchange information with governments, regional organizations and the private sector.
Component 1: Trends and Forecasts in Regional Beef Markets and Trade

1.1 Global Analysis – using IMPACT model (IFPRI) linked to the SPE model to analyse the impact of key global scenarios on regional industries from a medium to long term perspective (led by IFPRI in conjunction with UQ and other partners)

1.2 Regional Analysis - Annual regional analysis report and policy brief on agreed topic of relevance across the region (led by UQ in conjunction with partners in Vietnam and Myanmar and inputs from stakeholders across the Asia Beef Network)
Component 2: Domestic Industries, Policies and Responses

2.1 In-depth case studies/policy briefs relating to national cattle and beef industry development policy in Vietnam that can continue to benefit smallholders in the value chain (UQ, IPSARD, CIS). Topics will be developed in a consultative process.

2.2 In-depth case studies/policy briefs of scenarios related to cattle/beef industry development in Myanmar. (UQ, LBVD,YAU). Topics will be developed in a consultative process.
Component 3: Engagement, Knowledge Sharing and Capacity Building

3.1 Project Reference Groups in Vietnam and Myanmar (including key stakeholders from Government and private sector) providing feedback on project outputs and direction for future research priorities and links to policymakers.

3.2 Annual regional workshops on live cattle and beef markets in China and South-East Asia to be attended by key stakeholders from government and the private sector, the project team, workshop resource people and international stakeholders.

3.3 Two-way interaction between the project and stakeholders in industry, government and the development sector using internet based communication platforms.

3.4 Training of staff of collaborating organisations in (i) General Algebraic Modelling System (GAMS) programming; and (ii) usage of the SPE model.
Key Project Outputs

Publications on the impact of key global scenarios on regional industries - annually
Regional analysis report and policy brief – Annually
In-depth case study/policy brief for Vietnam – Annually
In-depth case study/policy brief for Myanmar – Annually

Plus

Annual Regional Workshop Reports
Training Curricula

Updated information and data on topics of interest – updated frequently through asiabeefnetwork.com and Facebook group
Discussion Points

1. Ideas for topics for regional analysis
2. Ideas for topics for case studies in Vietnam
3. Ideas for topics for case studies in Myanmar
4. Ideas for effective methods of getting information to policymakers
Ideas for topics for Regional Research

- Impact of *structural change* across the region – rising GDP levels, increases in incomes of consumers and of the opportunity costs of labour, changes in diet, increasing urbanisation and changes in relative exchange rates.

- *Policy settings* across the region – Indian policy on production and export of buffalo meat, China enforcing regulations against unofficial imports of cattle and beef, changes in whole country vs area treatment of FMD across the region, Indonesian policies on buffalo meat imports and breeding cattle import ratios and the potential stricter enforcement of phytosanitary regulations across ASEAN.

- Impact of *external factors* on the region - Food safety crises / scares, disease outbreaks (FMD/BSE), drought in Australia, and the entry of Brazil into the ASEAN market for beef.
# Ideas for topics for Case Studies

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<tr>
<th>Country</th>
<th>Potential Case Study Topics</th>
<th>Target for policy discussion</th>
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<tbody>
<tr>
<td>Myanmar</td>
<td>Pathways to liberalization of cattle transportation, export and slaughtering that protect the domestic herd from rapid depletion and safeguard the livelihood of smallholder farmers.</td>
<td>Department of Planning and Livestock Breeding and Veterinary Department (MOALI Myanmar)</td>
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<td></td>
<td>Cattle and beef industry development policy that can support the transition of the sector in Myanmar and deliver sustainable livelihood improvements for smallholders in the Central Dry Zone.</td>
<td>Department of Planning and Livestock Breeding and Veterinary Department (MOALI Myanmar)</td>
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<td>Vietnam</td>
<td>Sustainable inclusion of smallholders in a rapidly commercialising cattle and beef sector – a case study with a concentration on the Mekong Delta and North East South regions</td>
<td>Animal Husbandry Department (MARD Vietnam)</td>
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<td>Impact of potential upgrading of general slaughtering standards in Vietnam to be harmonized with ESCAS standards.</td>
<td>Department of Animal Health, Animal Husbandry Department (MARD Vietnam)</td>
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<td>Impact of increased reliance on imported cattle and beef to satisfy domestic demand for beef consumption</td>
<td>Animal Husbandry Department (MARD Vietnam)</td>
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Suggestions for Getting Information to Policymakers

Reference Groups including policy makers
Project partners include key policymaking organizations
Annual Stakeholder Workshops
Participatory Topic Development
Publications including policy briefs
Thank You