

**Report on ESFIM Workshop on Agricultural Commodity
Marketing Programs and Issues
26-27 February 2009, Sulo Hotel in Quezon City
Metro Manila, Philippines**

INTRODUCTION

1. The Workshop on Agricultural Commodity Marketing Programs and Issues was held on 26-27 February 2009 at the Sulo Hotel in Quezon City, Metro Manila, Philippines.
2. The Workshop was attended by eighty (80) representatives consisting of thirty (30) women and fifty (50) men from the following sectors: farming (20), grains business (4), feedmilling (13), food handlers/forwarders (7), foreign and local consultant (5), Corn Development Fund Committee (8) and the government sector (23). The List of Participants is attached as Annex A together with the program of activities (Annex B).

OPENING SESSION

3. Mr. Raul Q. Montemayor, Business Manager of the Federation of Free Farmers, warmly welcomed all the participants to the Workshop. In his Welcome Remarks, he gave a background on the Corn Development Fund of the NFA which was co-sponsoring the workshop together with the FFF-IFAP. He also discussed the objectives of the ESFIM program of the IFAP and its relevance to the workshop. Mr. Montemayor then explained that the first day of the workshop would focus on a stock-taking of the problems and constraints encountered in the marketing of agricultural products in the country. This would be followed by case study presentations on previous or current initiatives undertaken by the government or the private sector to address such problems, and an identification of lessons learned and best practices from such initiatives. The first day discussions would serve as inputs to the second day during which the commodity exchange proposal would be deliberated upon in more detail. Mr. Montemayor stressed the need to assess the proposal to establish an electronic commodity exchange system (CES) for selected Philippine products. He therefore enjoined the participants to analyze problems and constraints confronting the industry and to put forth measures to address such.
4. The Workshop was officially opened by Mr. Jessup P. Navarro, Administrator of the National Food Authority (NFA). In his Keynote Address, he emphasized the need to ensure food security for the country. With the emerging unstable global food situation, the already liberalized agricultural market and the eventual opening up of the rice market in compliance to commitment made with the World Trade Organization (WTO), the Philippine Government with the support of the private sector should prepare the domestic market against the adverse effects of globalization.
5. He likewise stressed the need for efficiency in marketing as a strategy towards ensuring food security. With the advent of so-called borderless economy, the Philippines should be able to adapt to modern technology in marketing - electronic market, commodities exchange, forwards and futures. Whatever form marketing adopts, the core idea is to create competition among buyers and sellers, enhance quality of products and promote efficiency of markets.

NFA Marketing Programs and their Role in Food Security

6. Mr. Ludovico J. Jarina, NFA Deputy Administrator for Operations, discussed the Agency's various marketing assistance programs (Annex C). Amid the NFA's limiting financial situation, the Agency still has to perform its mandate of ensuring food security and stabilizing the supply and price of rice. Thus, it is imperative for NFA to strengthen its indirect marketing intervention programs.

7. The implementation of these programs reduces NFA's cost of direct market intervention. Marketing assistance programs are support programs that primarily provide farmers with an added value to their crop and facilitate their entrepreneurial development. The enhancement of farmers' marketing capabilities will gradually wean them from the support of the government.

Case Studies on Experiences in Implementing a Marketing Scheme

8. Better Marketing Performance : The Case of Normin Veggies of Northern Mindanao

- a. Ms. Joan Cua Uy, Vice President for Marketing of Normin Veggies of Northern Mindanao, shared with the participants their cooperative's success story in marketing their produce (Annex D). The Normin Veggies is composed of independent growers, small farmers and input/service providers. Their buyers include the traditional market or traders, fastfood chains (Jollibee and McDonalds), processors, hotels and restaurants (Shangri-la and The Peninsula), supermarkets and consolidators.
- b. Normin Veggies utilizes the modern market chain - organizing growers for the market and organizing business to facilitate the market. Growers are organized through the clustering method where growers commit to undertake collective marketing. Produce are then consolidated in Normin Veggies Consolidation Center to facilitate the marketing of said products. The modern market chain focuses not just on quality but also on quantity (economic volumes), competitive pricing and reliability (good organizing).
- c. As Normin Veggies is also composed of small and unorganized farmers who till small and fragmented farms and have no access to buyers and other vital market information, the cooperative was challenged to address such problem. Understanding the vegetable market and its value chain, Normin Veggies learned that organizing its growers would strengthen their marketing advantage. Quality alone does not ensure a ready market. Trading in big volumes would be more economical and can consequently command a competitive price. In organizing growers for the market, farmer-members learned to undertake collective marketing thru clustering. Growers were thus trained to enter into cluster agreements which consider quality, volume and delivery schedule, contingency supply and operational flow. It is a fact and a challenge at the same time that farmers are production oriented. As such, they need to acquire skills necessary to engage in marketing. Skills then learned further taught these farmers to be market reliable by sustaining product availability.

9. The Dynamics of Business of the Staple Food of the Filipinos

- a. Mr. Herculano Co, President of Philcongrains, enlightened the participants on the dynamics of the rice business (Annex E). Rice trading is highly competitive, complicated, labor intensive and requires personal supervision. The price of palay and rice is dependent on many factors: the seasonality of the crop, the quality of palay, the accessibility of production area to nearest market depot, quality of milling/milling recovery, presence of smuggled rice in the market and volume of government imports.
- b. It is amazing however for Mr. Co to acknowledge the existence of rice smugglers and NFA rice-diversionists in the marketing system. He likewise admitted that NFA is their biggest competitor.

- c. Rice milling is a major determinant of rice price. The utilization of obsolete rice mills in many parts of the country whose milling recoveries ranged from 55% - 63% short charged consumers, retailers/wholesalers and farmers who transact business with these rice millers. The rice miller with a low recovery mill buys palay at a lower price then sells the rice at a higher price or reduces the standard weight of 50 kg. Confronted with this scenario, the government should therefore phase out or outlaw the use of low recovery mills and put up rice mills in areas which cannot produce respectable milling recovery. Farmers are recommended to be given priority in the use of these facilities.

10. **Marketing Issues and Challenges in the Sugar Industry**

- a. Mr. Ramon S. Reyes, Vice President for Corporate Marketing of Central Azucarera De Don Pedro Group Corporation (CADPGC), started his discussion (Annex F) with the presentation on the Philippine sugar industry. Sugar is classified based on market destination and is traded using the quedan system. The different classifications and the proportion that goes to the different types of quedans as of 2008-2009 are as follows: Class A (for export to the US) - 10%, Class B (for domestic use and for food processors) - 68%, Class C (for reserve) - 15%, and Class D (for export to the world market) - 2.5% (De) and 4.5% (Dr). Quedan is a sharing scheme between planters and millers at a ratio of 70:30 in favor of the planters. Traditionally, mills and refineries produce the sugar that traders sell to the end consumers.
- b. A total of 60,339 farms representing about 375 T hectares of sugar areas in the country are farmed by 55,740 sugarcane planters and produce an estimated 2.14 M metric tons (MT) sugarcane in CY 2004-2005. Of the total sugar farms, 74% are represented by 0.1 - 5.0 hectares farmed by 77% of total planters. Raw sugar production reached a 10-year record high of 2 M MT in CY 2002-2003 and since then production stayed along that level. For crop year 2007-2008, production is forecast to reach 2.3 M MT. The biggest users of sugar are the industrial users such as the beverage, bakery, confectionary and dairy industries.
- c. The sugar industry is currently facing a very uncomfortable economic situation and being confronted with a lot of marketing issues and challenges which CADPG regarded as a lost opportunity/ies or an added cost for them. Recognizing these, CADPG has responded to such situation and has thus come up with a *SWOT Analysis*. With these, the company learned to improve, innovate and integrate in the segmentation of Refined Sugar Market. CADPG has gone through expansion and diversification in terms of milling and refining, farm and port services and bioethanol. Moreover, they are employing total customer service and satisfaction, product and service efficiency and customer segmentation and product differentiation.
- d. Todate, CADPGC is not only growing, milling, tolling and refining sugar but it is now practicing general trading, industrial selling, wholesale and retailing, distribution and biofuel and energy. In general trading, sugar millers/refiners have the opportunity to interact with wider markets/synergies which can ultimately reduce cost, improve efficiency and improve margin. CADPGC is also into industrial selling which provides opportunity for product research and development and offers customized solutions which will provide better margin and improvement in service. Lastly, the company started selling directly to institutional users/retailers and even directly to consumers. This gives CADP an opportunity for market research, brand management and sales and distribution. CADPGC is also actively participating in the Government's Bioethanol Program which aims to achieve the targeted bioethanol requirement of the country.

11. The Future of our Corn Industry - Building Modern Corn Center

- a. Mr. Roderico Bioco, President of Philmaize, pioneered the trading of corn-in-cobs and opened opportunities for promoting clean environment. He outlined their plans (Annex G) under the Mindanao Grain Processing Co., Inc in Malaybalay, Bukidnon. The goals of this project are parallel to the government's national goals.
- b. Mindanao Grains envisions a Grains Super Highway that aims a modernized agriculture. To Philmaize, food security is not just achieving self-sufficiency, but also meeting the proper quality standards for food and feed safety. The standards for corn are maximum of 14% moisture content, 20ppb maximum Aflatoxin and 5% maximum damage. There should also be social justice where farmers are given the opportunity to earn a decent living by providing a fair price for their corn produce. Harnessing biomass heat and power from corn cobs will assist farmers in commanding a better price for their corn and subsequently a competitive price for local livestock and poultry industries.
- c. In achieving Philmaize' set national goals, it is foremost for the association to empower its farmer-members. Through the years of its existence, Philmaize learned the basic principles that serve as a guide that enable them to be market competitive. These basic principles include the following: post-harvest is not the responsibility of farmers, economy of scale, market transparency through quedan system, corn-on-cub buying, high quality grains selling, biomass drying system, private sector-led initiative and proactive government support.

12. Masisit Dacal Livelihood Coop Inc. (MASCOOP)

- a. Ms. Felyjean Pacris presented MASCOOP's basic profile (Annex H). MASCOOP is composed of 2,221 members and 552 associate members, 90% of whom are farmers with an average landholding of 1.2 hectares. It serves 124 barangays, 21 municipalities and the provinces of Cagayan and Apayao. The coop's total assets have grown to more than P 122 M as of 31 December 2008 and the coop employs a relatively large personnel complement.
- b. From grains marketing, MASCOOP has expanded into an agri-business like swine production and the operation of four agri-stores in Cagayan and farm mechanization service and trading center in Apayao. The coop's business ventures diversified into operation of loans and savings program, training center and beach resort.
- c. MASCOOP has learned that competition in palay and corn marketing is very rigid and that the local market is largely dominated by private traders and middlemen. Bulk delivery to other province, say Bocaue, Bulacan, entails a very high transport and handling costs, and unnecessary expenses due to highway robbery/thieves and incidence of truck hijacking which resulted to low and negative income for them. MASCOOP has then recognized that a much better marketing scheme is through direct/institutionalized buyers e.g., Institutionalized Procurement Program tie-up with NFA - Allacapan since it offers additional incentive and lesser handling and transporting costs.
- d. Banking on the major lessons learned in MASCOOP's operations through the years, the coop has adopted winning schemes that ensured the sustainability of grains supply that ensured MASCOOP's continuous marketing activities. Though already successful in its present ventures, MASCOOP continuously improve its capability by adding value to agri-products especially corn, promoting internet-based marketing to save on cost, encouraging farmers to organize and venture into

contract - growing and calls for the protection of traders against unnecessary fees during transport of goods.

An Assessment of Existing Agricultural Marketing Programs of the Government

13. Former NFA Director Myrna P. Reburiano provided the group with her assessment (Annex I) of the country's existing agricultural marketing programs in the Philippines run by the government and the private sector. In Ms. Reburiano's evaluation, the failure of marketing programs to encourage participation from farmers was due to the following:
- Farms are located far from trading center - Lack of post harvest facilities (PHF) and poor infrastructure support for value-adding activities and transport of agricultural products
 - Lack of Advocacy and farmers' immediate need for cash
 - Lack of timely marketing information and training
 - timeliness of information and the ability to analyze the information
 - technological literacy
14. The following are her recommendations:
- Support the construction/build up of PHF and communication services
 - Massive advocacy and training
 - Revitalize the full extension of an access to sustained rural credit for farmers
 - Develop marketing system to address farmers' need for cash through Commodity Exchange System

Agricultural Commodity Exchange System

15. Former Administrator Gregorio Y. Tan, Jr. discussed the proposed Commodity Exchange System or CES (Annex J). Given the present global market environment, Mr. Tan emphasized the need to synchronize to this new development to make markets fluid as survival depends not only in production offering but also on marketing efficiency. In marketing products, market players must learn the arbitrage of time, place and form.
16. Considering the above, Mr. Tan proposed the establishment of a CES where farmers and other sellers deposit their products in a designated warehouse for sale and processors, manufacturers, consumers and other buyers withdraw the product from a designated purchase warehouse/area. Proposed to be possibly covered are products nationally produced and nationally consumed such as palay/rice, corn, coconut and sugar.
17. Mr. Tan further discussed how the CES will operate considering the type and scope of operations, the source of funds to get the system going, the entity that will handle the needs of the system and the services the system will offer to its clientele.

Mechanics of the Workshop

18. Ms. Reburiano briefed the participants on the mechanics of the workshop proper (Annex K). Three workshop groups were formed to discuss issues on CES structure, operations and the role of the government or private sector.
19. To aid the discussion, the three workshop groups were furnished with general questions that need to be addressed. Guide questions were likewise provided for each of the workshop group which will try to outline what the group is looking for in a system. The guide questions, however, does not limit the group from adding issues to improve the system's characteristics to make it sustainable and profitable.

Output of the Workshop Groups

20. The workshop groups assessed how CES will affect their marketing position considering the five thematic areas such as (1) reducing access barriers, (2) reducing market risks, (3) reducing transaction costs, (4) strengthening bargaining power and (5) strong incitation to a better organization of marketing practices. In responding to said question, the groups addressed said areas based on the importance of each issue. Each group likewise assessed if there are some constraints that may prevent farmers to draw the maximum benefits from CES.
21. Specific questions guided the workshop groups in developing the desired CES. With regards the structure of the system, it is essential to determine which sector (government or private) will operate CES and who shall compose its Board or Council. The need for separate entity/ies to handle major operations of the system was also looked into. For CES operations, points for consideration were the scope of its operation, the commodities to be covered and the advantages/disadvantages if CES will operate as a government office, GOCC or as a private entity. The workshop group likewise assessed whether there is a need to have separate entities to handle the different operations of the system. If there are services that the system will offer, the group should determine the bases for service fees to be charged. The role of the government and the private sector should be clearly outlined. The workshop group should address issues specific to each sector to determine the delineation of responsibilities.
22. Each group has favorably endorsed the establishment of the CES as it will improve the marketing position of the producers/farmers' organization, traders and users/consumers.
23. With regards the guide questions specifically provided to each group the outcome of the group discussion are as follows:
 - Group I (Structure) – CES will be multi-sectoral, privately owned/operated with minimum government intervention. The sustaining principles are transparency, integrity and liquidity. (Annex L)
 - Group II (Operations) – It is recommended that there will be one (1) entity to handle all operations, preferably a private sector for more flexibility and market opportunity-driven, so that it will be a one-stop-shop. Proposed commodities to be covered include palay/rice, corn, sugar and coconut. CES should be nationwide in scope and regionalized in operation. (Annex M)
 - Group III (Role of Government/Private Sector) – Initially, the Government as the initiator of the System will be involved in the operation of CES especially in terms of resources and funding. The Government should establish credibility in the organization in order to encourage private sector participation. Gradually, measures will be developed for the eventual transfer of CES implementation to the Private Sector. (Annex N)

Synthesis of Workshop Output

24. The main purpose of this workshop is to develop a roadmap whose endview is to establish an agricultural commodity exchange system. The strategy in developing such a roadmap is the creation of three workshop groups which discussed several issues. Answers were provided to some issues and some answers/solutions even have implementation details. However, some issues remained as questions and such will be the subject of further studies.
25. The working groups agreed for the establishment of the CES considering the benefits it will provide to the industry stakeholders in terms of wider market base, marketing information,

and strengthened marketing practices of the cooperatives. The system is perceived to improve the marketing position of all stakeholders such as the producers, traders, users and consumers. The availability of relevant marketing information will aid producers in speculating and hedging prices and at the same time will lower the cost of purchase of consumers.

26. In the discussions, certain things were outlined in sequence – what must come first, what will come next - and certain activities that can also be done in parallel were also outlined.
27. For CES to be credible, the system will be multi-sectoral and will be privately owned/operated with minimum government intervention. As a private entity, it is more flexible and market opportunity - driven. The sustaining principles of the CES shall be transparency, integrity and liquidity, among others.
28. Suggested commodities to be covered by CES are palay/rice, corn, sugar and coconut which require different management systems. To enable the CES to succeed, the issues of unorganized farmers, weak farmers' organizations and the unavailability of relevant marketing information from all the participating sectors must be looked into.
29. There were some issues that need to be addressed to pave the way for the establishment of an efficient and effective exchange system. Although there were corresponding recommendations, there is still a need to form a discussion group to evaluate the viability and workability of the suggestions.

Reactions from the Department of Agriculture

29. Undersecretary Segfredo R. Serrano apprised the workshop participants that Secretary Arthur C. Yap is very receptive to the implementation of the CES considering that the system is beneficial to all sectors particularly the small farmers.
30. Since all the working groups supported the establishment of the system, the Undersecretary encouraged the participants to start implementing the system at the most suitable time. However, if there are some gray areas that need to be resolved, Usec. Serrano suggested the creation of a discussion group/team to resolve the said issues.

CLOSING SESSION

31. Undersecretary Segfredo R. Serrano of the Department of Agriculture in his opening statement expressed his appreciation to all the participants to the Workshop for their active participations, valuable ideas, comments and recommendations that made the said workshop a success.
32. He formally closed the workshop by urging the group's active participation in the implementation of the proposed Commodity Exchange System (CES) in order to achieve the objectives of the said undertaking.

Workshop on Agricultural Commodity Marketing Programs and Issues
Sulo Hotel in Quezon City, Metro Manila, Philippines
26 - 27 February 2009

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