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QUARTERLY



PCAF releases DA's Commodity Industry Roadmaps on its website (part 2)

Twenty Commodity Industry Roadmaps (CIR) are now available on the official website of the Philippine Council for Agriculture and Fisheries (PCAF).

Days after the official launch of the CIRs on June 17, 2022 at the Department of Agriculture (DA) National Management Committee Meeting, PCAF released the copies on www.pcaf.da.gov.ph.

Aside from publication and dissemination entrusted to PCAF, the agency also conducted series of consultations to various stakeholders. It was during the National Food

Security Summit on May 18 to 19, 2021, when DA saw the effectiveness of engaging a wide range of stakeholders in harnessing participation of the agriculture and fishery value chain players.

Through the issuance of a Special Order No. 654, s. 2021, DA created the Agriculture and Fishery Commodity Industry Roadmap Development Teams (CIR-RDTs) and designated Focal Persons to spearhead the formulation of each roadmap and guarantee the involvement of stakeholders and their ownership of the industry process and outputs.

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The CIR-RDTs is composed of the industry players and technical experts from the various government industries.

PCAF, as DA's participatory arm, is tasked to ensure the active participation of stakeholders and government agencies and facilitate and provide full Secretariat Support in the consultation activities for each commodity program.

It also prepared the detailed budget required to successfully accomplish tasks that the agency and commodity programs would fund.

DA allocated PhP5M for each roadmap to PCAF taken from the commodity programs. Technical secretariat from PCAF designated as focal persons for the CIRs and the drafts were presented to the respective NBPCs.

At the September 15 Management Committee meeting, Secretary William Dar directed PCAF, through OIC Executive Director Liza Battad, to "oversee the completion of all commodity roadmaps" within 2021.

The approved CIRs are the following:

Fisheries and Aquaculture

- * Philippine Shellfish Industry Roadmap
- * Philippine Shrimp Industry Roadmap
- * Philippine Seaweed Industry Roadmap
- * Philippine Tilapia Industry Roadmap
- * Philippine Milkfish Industry Roadmap

High Value Crops

- * Philippine Abaca Industry Roadmap
- * Philippine Coffee Industry Roadmap
- * Philippine Cacao Industry Roadmap
- * Philippine Vegetable Industry Roadmap
- * Philippine Mango Industry Roadmap
- * Philippine Banana Industry Roadmap
- * Philippine Onion Industry Roadmap
- * Philippine Coconut Industry Roadmap

Poultry, Livestock, and Corn

- * Philippine Dairy Industry Roadmap
- * Philippine Carabao Industry Roadmap
- * Philippine Yellow Corn Industry Roadmap
- * Philippine Small Ruminants Industry Roadmap
- * Philippine Hog Industry Roadmap
- * Philippine Poultry Broiler Industry Roadmap
- * Philippine Poultry Layer Industry Roadmap

"They are symbols of our commitment to push forward and operationalize the major strategies of the OneDA Reform Agenda," said former DA Assistant Secretary-designate for Regulations and PCAF OIC Executive Director Liza Battad during the official launch.

Find out more about the CIRs in this special edition of the PCAF Quarterly as the agency gives a glimpse on each CIR.

For this issue, PCAF will focus on the High Value Crops. The first part of the special edition featured Fisheries and Aquaculture and Onion from the High Value Crops set. ■

CIR in Focus: High Value Crops

7. Banana

Banana is one of the most economically important fruit crop commodities in the Philippines.

Majority of banana varieties grown in the country are Cavendish, followed by Saba and Lakatan. Other varieties include Latundan, Bungulan and Señorita, among others.

Cavendish is mainly produced as an export product. The Saba/Cardaba variety is usually processed into

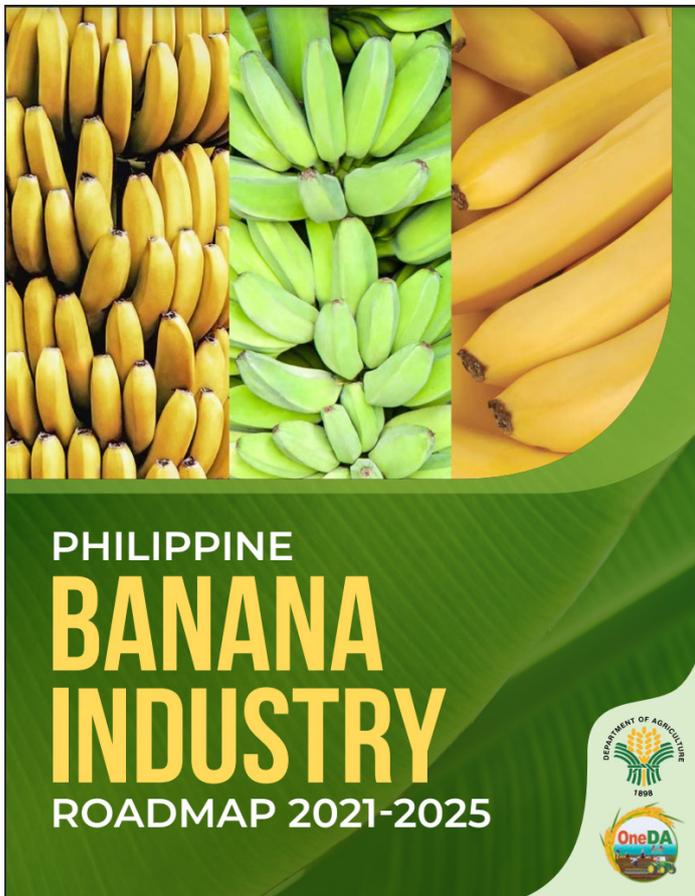
banana chips for export while Lakatan is consumed mostly as fresh fruit in the local market.

Aim

One of the identified strategies to "level up" Agriculture is Roadmap Development, this is a key strategy to acknowledge the role and promote inclusivity of the farmers, public and private stakeholders in the development of an industry.

The Department of Agriculture thru the High Value Crops Development Program have spearheaded the

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Banana Industry Roadmap 2022 – 2040 that aims to serve as a guide to all industry stakeholders to realize the targets set for the short- (2022-2025), medium- (2026-2030) and long-term (2031-2040) direction of the commodity industry.

Objectives

The roadmap is envisioned as the embodiment of how the industry will achieve its goals and inclusive growth through a value chain approach taking into consideration the development of the current situation of the industry. Specifically, the roadmap aims to:

1. Identify the key industry players and build strategic partnerships
2. Identify areas for investment, strategies, policies, and programs for the short, medium and long-term growth of the industry
3. To ensure that the Philippine banana industry continue to be a major player in the world banana market

8. Coffee

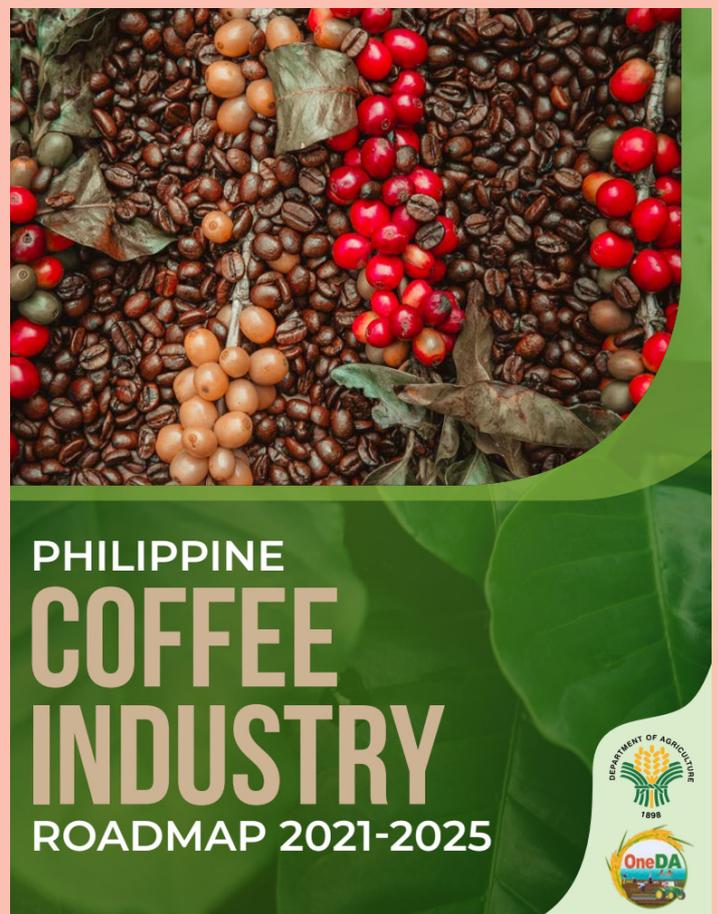
Coffee has been an agricultural commodity spanning four centuries of production in the Philippines.

Through the years, coffee has undeniably become an industry that makes a positive impact to the Philippine economy with an increasing trend in domestic consumption for the last 10 years from 2009 to 2019 (ICO, 2021).

As proof of its being a viable agricultural commodity, all coffee stakeholders have united to develop a long-awaited Philippine Coffee Industry Roadmap for 2017-2022.

However, as the first roadmap is yet to fully implement and accomplish identified targets, new issues, concerns and changing scenarios in the coffee industry have emerged that need to be taken into consideration. Hence, the DA, Department of Science and Technology (DOST) and the Department of Trade and Industry (DTI) initiated the review and modification of the coffee roadmap targeting a short- (2021 – 2025), medium- (2026 – 2030), and long-term (2031 – 2040) timelines to achieve target goals/objectives.

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The new coffee roadmap is an immediate response to the Top 5 Priority Recommendations of the DA for a food secure and self-sufficient industries of coffee and cacao, where a separate roadmap for the cacao industry has also been prepared.

Goals

- * Increase yield of dried cherries from 0.8kg/tree to 2kg/tree by 2026
- * Lessen dependence on coffee bean and coffee products importation
- * Improve farmers' standard of living from poverty level of 15% per annum through diversified sustainable agricultural farming systems
- * Increase local market consumption and a globally accepted quality standards of Filipino coffee

Objectives

The major objective is to develop a harmonized coffee roadmap led by the stakeholders, in collaboration with the DA, DTI, the academe and other key players in the coffee industry.

The roadmap integrates the coffee value chain analysis and addresses the challenges in the industry with appropriate strategies and successful implementation of agreed action plans, in answer to the following major goals:

1. For the Filipino coffee farmer to reach a yield of 2 kg of dried cherry/tree (1kg GCB/tree) in either a mono crop or an intercrop setting.

For the net farm income to be above a province's poverty threshold, for the farmer and his family to sustain coffee farming operations, with increase growth in the coffee domestic market by 5% per year for Arabica; 10% for Robusta; 10% for Liberica; and 10% for Excelsa.

2. For the Philippines to have a continuous supply of coffee by continuing to increase planted trees by ensuring that major coffee-growing regions will cultivate coffee trees with government support on rural credit, plantlets, inputs, postharvest facilities, manufacturing, and marketing linkages; and consider monocrop and intercrop number of trees/ha.

3. For farmers to continue being upskilled on the technologies (e.g. GAP, GMP) of coffee production, processing, and marketing.

The Philippine coffee industry roadmap hopes to cover the following objectives:

- a. provide a comprehensive assessment of the Philippine coffee industry;
- b. analyze market trends and identify opportunities;
- c. define goals and formulate strategies to increase yield, lessen importation, and improve farmer's income; and
- d. recommend plans using the coffee value chain framework for 2021 to 2040 for a competitive and vibrant Philippine coffee industry.

9. Cacao

The crafting of the revised Philippine Cacao and Chocolate Industry was necessitated to realign its vision, mission, goals, strategies and interventions with the Philippine Republic Act 8435 (Agriculture and Fisheries Modernization Act of 1997), the United Nation's Sustainable Development Goals (UN SDGs), the AmBisyon Natin 2040, the Philippine Development Plan (PDP) and the proposed Philippine Cacao Industry Development Act".

This revised roadmap contains new strategies and interventions as well as retaining some Action Plans in the 2017-2022 Philippine Cacao Industry roadmap that are deemed relevant and doable but need more push in its implementation.

Two of the major revisions made in the existing roadmap are:

1. the vision spells out the focus on building strong Philippine branding and

2. anchor the strategies and interventions on the principle of industry clustering, localization and market demands, as well as heightening a context of inclusivity in its scoping and application.

Goals

The goal is to produce 50,000 metric tons (MT) of quality fermented beans by 2025 to meet the demand of the export and domestic markets through a 40% annual increase in production.

In order to achieve the 2025 roadmap goal, the following objectives are deemed to be attained:

- To make available and accessible quality cacao planting materials as well as rehabilitate existing 31,000 hectares (600 trees/hectare);

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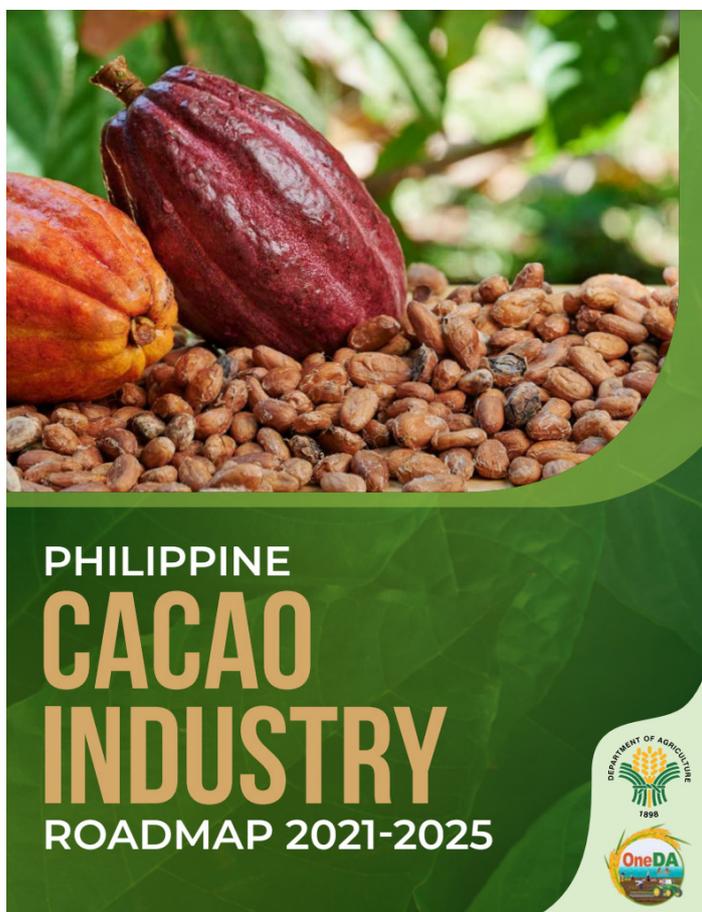
- To increase 7,000 hectares of newly planted trees in 5 years;
- To raise yield to 2 kg/tree/year;
- To ensure availability of quality fermented cocoa beans to support and sustain value-adding activities;
- To contribute to the goal of attaining inclusive growth and poverty alleviation through:
 - Increase farmers' gross income to at least PhP 130,000 per hectare per year;
 - Increase export sales by at least USD 75-M by 2025;
 - Generate at least 17,000 jobs by 2025;
 - Encourage young people to go into cacao production.

Objectives

The general objectives of this roadmap are to harmonize the production and postharvest practices of cacao growers and to establish the Philippine brand in the global market.

To achieve these objectives, interventions will be focused on the following directions:

- Expansion of production areas in areas suitable for cacao growing based on the Climate and Soil Suitability Map
- Increase in fermented bean productivity level
- Moving Up of the Cacao Industry Value Chain
- Strengthening of Market Presence through Branding
- Focus on Fine Flavor Beans Market
- Apply the principle of clustering, localization and market demands



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10. Vegetables

The development of the Philippine Vegetable Industry Roadmap is one of the results or the way forward during the NFSS conducted in May 2021.

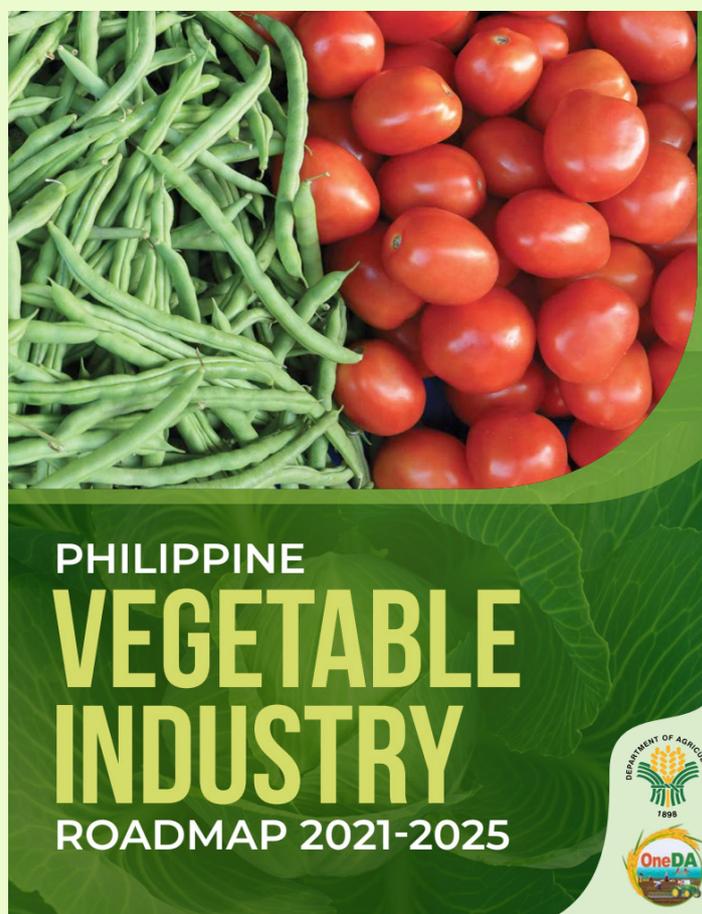
The existing vegetable roadmap was drafted in 2014, however it was not signed and adopted, thus the need to update and revise.

Separate roadmaps for the lowland and highland vegetables were developed, thus, in updating the roadmap, the team agreed to come up with one roadmap for the vegetable industry. The roadmap was crafted to:

1. Engage wide range of stakeholders in the agriculture value chain and ensure that the stakeholders will have the ownership of the process and output
2. Level up the vegetable sector through the identified 18 key strategies of DA, and
3. Anchor in the food security framework- with the vision of a food secure and resilient Philippines with empowered and prosperous farmers and fisherfolk and pursue "OneDA" and "OneNation" approach.

The roadmap covers the following priority crops:

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lowland 'pinakbet' (ampalaya, tomato, squash, pole sitao, eggplant, okra); highland 'chopsuey' (cabbage, Chinese cabbage, carrot, snap beans, potato).

The vegetable industry is envisioned to be a modern competitive industry producing and supplying safe, quality, and diverse vegetables at affordable prices through sustainable production and equitable marketing systems.

Mission

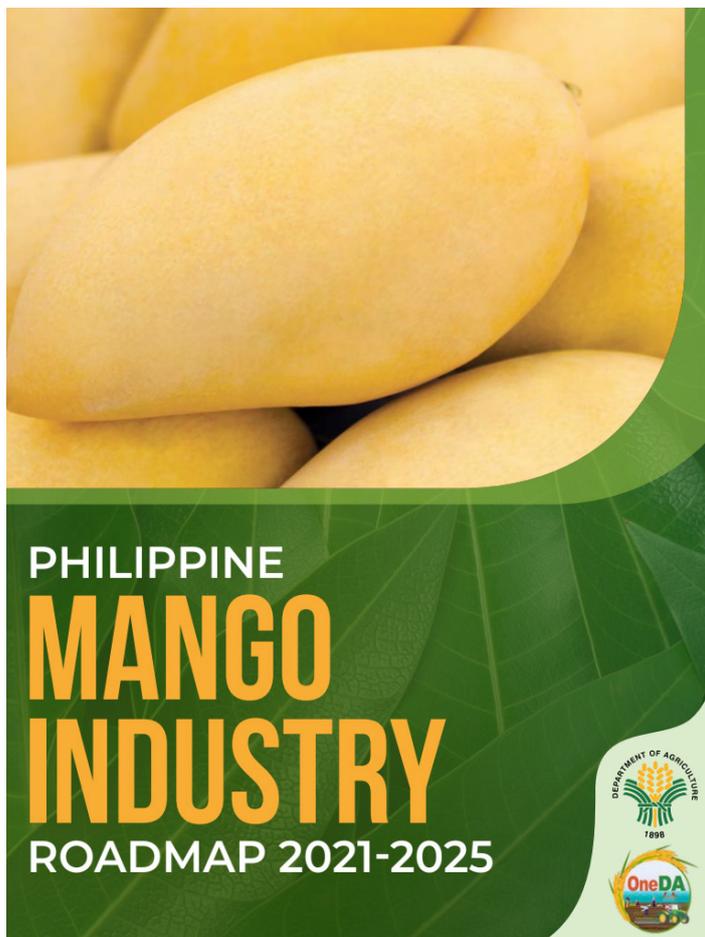
- Empower vegetable farmers and provide livelihood for key players across the value chain
- Ensure access to quality, safe and affordable vegetables throughout the year
- Share timely and accurate information to consumers to assist them in making decisions on food choices

- Provide quality support services to vegetable growers and traders to enhance their competitiveness and sustainability

Objectives

- Improve farmers' productivity and income by at least 5% per year
- Reduce post-harvest losses from 40% to 5% by 2025
- Encourage more youth and women into vegetable farming
- Increase per capita vegetable consumption 5% over a period of 5 years
- Ensure year-round sufficiency level vegetables
- Ensure food safety
- Efficient communication and on-time data monitoring
- Enhance KADIWA and expand access to international market
- Ease access to resources and services

11. Mango



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The Philippine Mango Industry Roadmap 2021-2025 lays the short-term strategic direction of the mango industry both local and international.

It serves as a guide for the Philippine government to make sure that its investment decisions are aligned with the priorities of the industry, with the collective approval of the different stakeholders of the mango industry.

The updated Mango Industry Roadmap for the year 2021-2025 complies with the Memorandum Order No. 37, Series of 2021 by the Office of the Secretary of DA.

It stands out among the previous roadmaps as it puts value on the active participation and collaboration of the different stakeholders-both public (i.e. government agencies) and private (i.e. mango farmer organizations, and private businesses) sectors within the mango value chain.

The roadmap is anchored to the Philippine Republic Act 8435 - Agriculture and Fisheries Modernization Act of 1997, United Nations' Sustainable Development Goals (UN SDGs) 2030, Ambisyon Natin 2040, and the Philippine Development Plan 2017-2022.

Goals

The Philippine Mango Industry Roadmap aims to:

- Ease access to information and quality standards
- Stabilize and increase mango production
- Improve productivity and efficiency by 5% per year
- Reduce post-harvest losses from 30% to 5% by 2025
- Expand market access
- Ease access to information and quality standards

Objectives

The general objectives in updating the Mango Industry Roadmap are to ensure the survival of the mango producers; to increase the industry's resiliency to climate change; to provide safe nutritious, affordable,

and accessible products to consumers throughout the year; to provide opportunities for all segments in the value chain to modernize; to be globally competitive and strengthening foothold in export markets where the Philippines has a competitive advantage.

The specific objectives were to:

1. Provide a profile, the prospects, and trends in the mango industry including current situation and environment, global and domestic and relevant benchmarks on production technology and costs, competitive measures, and other trends;

2. Analyze the mango supply/value chain;

3. Set goals and objectives which will operationally flesh out the shared vision, quantify targets along a timeline with indicators of production, resource and cost efficiency and competitiveness; the rationale and directions of the proposed strategies and programs; and

4. Recommend strategies, programs, budgetary, and other resource requirements to achieve the set goals, objectives, and targets.

12. Coconut

The Coconut Farmers and Industry Roadmap (COCOFIRM) focuses on two interlinked components -the farmers in the production sector and the various coconut-based value chain industries in the processing and marketing sectors.

The roadmap is composed of situational analyses, traditional and selected non-traditional products' value chain mapping, benchmarking, market trends analyses, SWOT analysis, and market analysis that explore opportunities and constraints in penetrating new markets or expanding value chains of selected products.

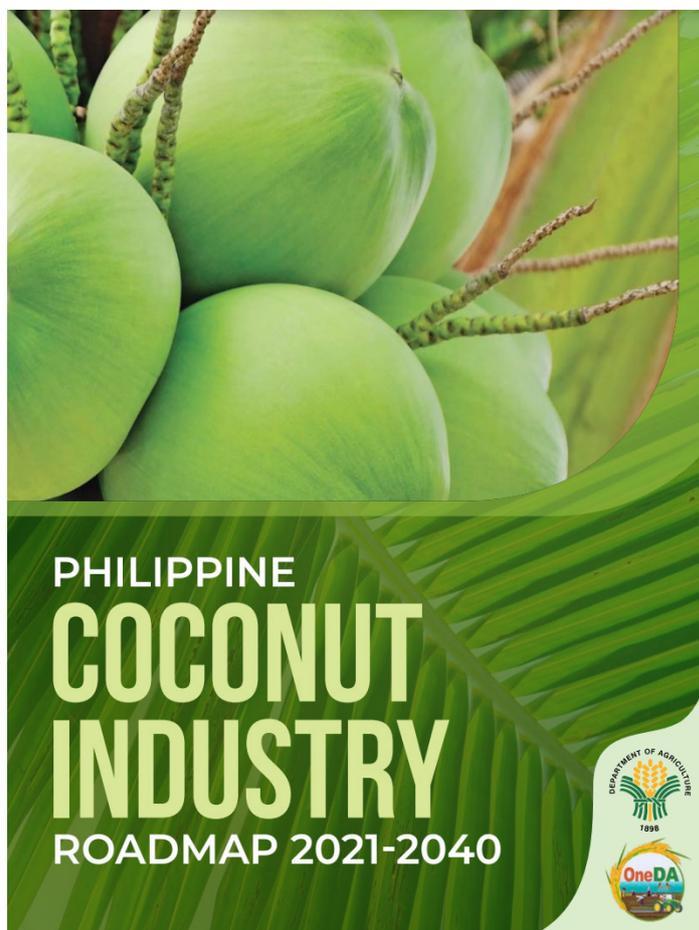
The roadmap identifies corridors of development where farmers have an opportunity to participate in a higher level of the value chain either by partnering with other actors or participating as cocopreneur. It also identifies coconut technologies, intensified farming systems, and diversified livelihood options of increasing whole farm productivity.

Aim

COCOFIRM aims to provide direction and recommendations towards sustainable development of the coconut industry, focusing on:

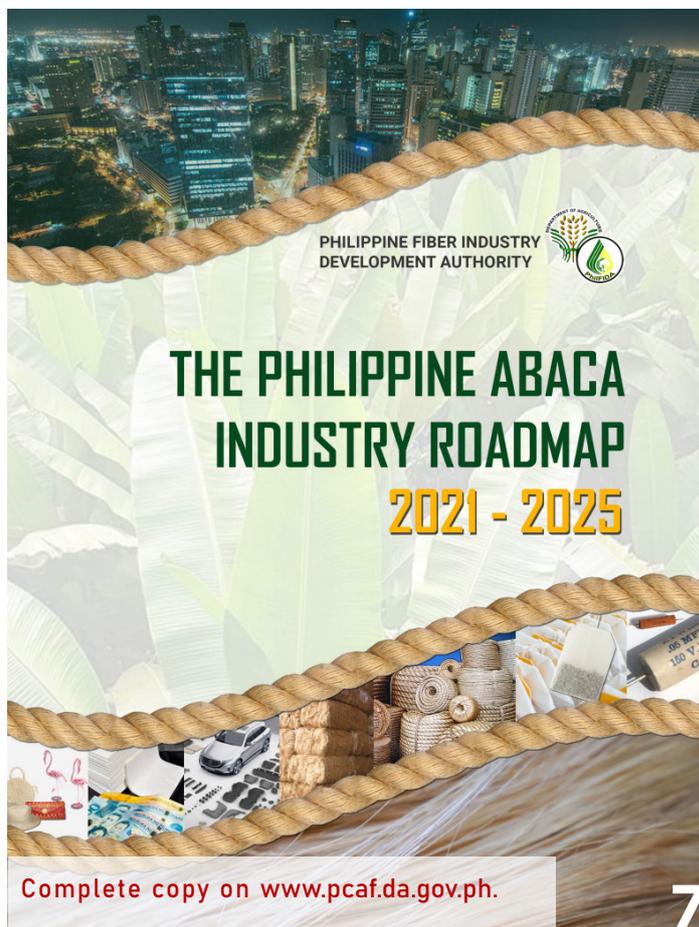
1) inclusive growth to lift the coconut farmers out of poverty and

2) improving the competitiveness and expanding the market potential of traditional and non-traditional coconut products.



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13. Abaca



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The Philippine Abaca Industry Roadmap sets the direction for the Philippine abaca industry. It encompasses industry analyses, benchmarking, and supply/value chain. This roadmap identified the potential areas intended for planting and treatment of diseases which are the two most important factors in abaca fiber production.

A broad range of private and public sector groups contributed to the production of this document which sets forth new policy, capacity, and capability priorities for the Philippine abaca industry.

Coordination and analysis of the inputs, organization of the workshops, and preparation of this document were carried out by PhilFIDA. Stakeholders' meetings and workshops were hosted and facilitated by PhilFIDA Regional Offices.

Goals

- Produce sufficient quality abaca fiber to supply domestic and international markets;
- Establish rural livelihood and economic businesses that improve farming practices and land vegetation, rehabilitate the environment, and mitigate climate change;
- Establish disease free abaca plantations in all regions to provide sustainable fiber supply for pulp millers, cordage companies and rural enterprises;
- Set new direction and agenda for R & D to improve varieties, increase fiber production through mechanization, disease management, postharvest, processing and utilization towards production of fiber-based products and by-products for industrial, commercial, and other uses;
- Strengthen collaboration among industry stakeholders – international investors, local and national governments, farmer cooperatives/

associations, private sector, non-government organizations, academe, and corporations; and

- Promote an investment climate conducive for foreign and local direct investors for upstream and downstream processing.

Objectives

- To expand/rehabilitate a total of 67,100 hectares of abaca areas from 2021 to 2025;
- To mass produce planting materials through tissue culture, macropropagation, conventional method and seeds;
- To increase fiber production by 177,189 MT spread over a period of five years.
- To adopt abaca tuxy buying scheme or abaca freefarmers social enterprise in the production of quality abaca fiber through cooperative and association approach;
- To introduce new technologies in abaca production and treatment of abaca diseases;
- To accredit private, government (LGUs), and commercial abaca nurseries and distribute healthy planting materials;
- To train LGUs and NGOs agricultural technicians and farmers on new and improved fiber production technologies;
- To upgrade and modernize/mechanize post-harvest equipment and facilities to improve efficiency and increase fiber production;
- To strictly implement abaca grading standards;
- To conduct R&D for the production of quality and disease-free planting materials, new technologies on plantation establishment, disease management, production of by-products of abaca fibers, and processing and utilization in partnership with universities, corporation, and private sectors; and
- Establish Monitoring and Evaluation Plan in partnership with abaca stakeholders, LGUs, NGOs and other groups.

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