

Mekong-U.S. Partnership Track 1.5 Policy Dialogue on Food and Agriculture Trade and Investment Summary Report





The Mekong – U.S. Partnership promotes the stability, peace, prosperity, and sustainable development of the lower Mekong sub-region. It further reinforces the strong and longstanding relationship among the United States, Cambodia, Lao PDR, Myanmar, Thailand, and Viet Nam. The Partnership builds upon 11 years of cooperation and progress from 2009-2020 through the Lower Mekong Initiative (LMI) to expand collaboration in the face of new challenges and opportunities. The Partnership supports the implementation of the ASEAN Community Vision 2025 and is an integral part of support and cooperation between the United States and ASEAN.

Find more about the Partnership at mekonguspartnership.org/.

Note: This report reflects the combined analysis and recommendations of participants in the Policy Dialogue event. The views expressed within do not necessarily represent the views of the Department of State or the U.S. government.

STIMSON

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The US-ASEAN Business Council was established in 1984 as a non-profit organization. On behalf of its members, the Council conducts research and analysis of economic, environmental, financial, political, and social, conditions in the 10 countries of the Association of Southeast Asian Nations (ASEAN). Brunei Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, and Vietnam comprise the 10 nations of ASEAN. The Council utilizes the results of its research and analysis to assist its member companies by providing educational programs, technical information for product innovation, and trade and investment related activities. Through its foundation, the Council provides support for humanitarian efforts, community engagement, and educational scholarships. The Council has become the leading voice of the U.S. private sector in promoting mutually beneficial trade and investment relationships between the U.S. and the 10 countries of Southeast Asia. More at <https://www.usasean.org/>.

ABOUT THE POLICY DIALOGUE SERIES

This summary report provides an outline and recommendations derived from discussions on needs and gaps in the Mekong region related to food and agriculture trade and investment, held as part of the Mekong-U.S. Partnership Track 1.5 Policy Dialogue series. The Policy Dialogues are a series of eleven conferences taking place between 2021 and 2025 that are generously supported by a grant from the U.S. Department of State’s Mekong-U.S. Partnership. Cross cutting principles of inclusivity, resilience, and collaboration are applied to all conferences in this series.

The U.S. Government launched the Mekong-U.S. Partnership in 2020 to expand cooperation with the five countries of the Mekong sub-region on strategic challenges and shared priorities under the Partnership’s four areas of cooperation (non-traditional security, natural resources management, economic connectivity, and human resource development). The Mekong-U.S. Partnership builds on the strengths of the Lower Mekong Initiative’s development-focused agenda by cooperating on strategic sub-regional issues and challenges. Each area of engagement under the Mekong-U.S. Partnership is supported by a flagship project. The Partnership’s Track 1.5 Policy Dialogue series serves as the flagship program of the Mekong-U.S. Partnership’s human resources development area of engagement

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KEY ACRONYMS

AI	ARTIFICIAL INTELLIGENCE
ASEAN	ASSOCIATION OF SOUTHEAST ASIAN NATIONS
CBTA	CROSS BORDER TRADE AGREEMENT
CODEX	FOOD AND AGRICULTURE ORGANIZATION'S CODEX ALIMENTARIUS
ERIA	ECONOMIC RESEARCH INSTITUTE FOR ASEAN AND EAST ASIA
F&A	FOOD AND AGRICULTURE
FAO	FOOD AND AGRICULTURE ORGANIZATION
GMS	GREATER MEKONG SUBREGION
ICT	INFORMATION AND COMMUNICATIONS TECHNOLOGY
IP	INTELLECTUAL PROPERTY
ISPM	INTERNATIONAL STANDARDS FOR PHYTOSANITARY MEASUREMENTS
LMI	LOWER MEKONG INITIATIVE
MUSP	MEKONG-U.S. PARTNERSHIP
NGO	NON-GOVERNMENTAL ORGANIZATION
R&D	RESEARCH AND DEVELOPMENT
SME	SMALL AND MEDIUM ENTERPRISES
T&I	TRADE AND INVESTMENT
UPOV	INTERNATIONAL UNION FOR THE PROTECTION OF NEW VARIETIES OF PLANTS
VICH	TECHNICAL STANDARDS FOR VETERINARY MEDICAL PRODUCT REGISTRATION
WOAH	WORLD ANIMAL HEALTH ORGANIZATION

A NOTE FROM THE CONFERENCE CHAIR

The tenth Mekong-U.S. Partnership Track 1.5 Policy Dialogue on Food and Agriculture Trade and Investment was held in Jakarta, Indonesia from June 4-5, 2025. The Policy Dialogues are a series of 11 conferences that took place between 2021 and 2025 and explored solutions to key policy and economic development challenges in the Lower Mekong sub-region. This tenth Policy Dialogue focused on food and agriculture trade with and within the Mekong River basin, with particular focus on industrial agriculture, small and medium enterprises (SMEs) in agriculture, barriers to cross-border food and agriculture trade, livestock health, opportunities and challenges for technology and innovation in agriculture, and supply chains.

Fifty-four experts participated in in-person activities throughout the two days of the Policy Dialogue in Jakarta. Approximately 46% of the attendees came from one of the five Mekong countries, with 20% coming from the United States, 17% from Indonesia, and the remaining attendees from India, the Philippines, Australia, and Japan. The private sector was well represented at 39% of all attendees, with 22% coming from think tanks and NGOs, 18% from government, and the remaining attendees from academia and the ASEAN Secretariat. About one quarter of the speakers were under 40.

We deeply appreciate the support provided by the U.S. Department of State and the Mekong-U.S. Partnership for this Policy Dialogue. In particular, the team would like to thank Katie-Jo Younkins, Kevin Rutigliano, Mackenzie Hale, Darby Parliament, and Nicole Smolinskse at the U.S. Department of State Bureau of East Asian and Pacific Affairs. We also appreciate the support from Charge d’Affaires Kate Rebholze and her team at the US Mission to ASEAN in Jakarta. The U.S. ASEAN Business Council was our local co-host partner, and we would like to thank Hai Pham, Cath Salazar, Robin Huang, Jannica Tjandra, and Angga Antagia for their assistance in identifying speakers and implementing the Policy Dialogue.

All of these and others contributed to an interactive and impactful Policy Dialogue. We would also like to thank our 54 presenters and attendees for engaging actively during the discussions. In addition to this Policy Dialogue event series, the Stimson Center has engaged on Mekong food and agricultural security issues for over a decade and will incorporate insights gained from these events through ongoing programming.

Sincerely,

Brian Eyler

The Stimson Center Southeast Asia Program

Co-Chair

EXECUTIVE SUMMARY

The tenth Mekong-U.S. Partnership Track 1.5 Policy Dialogue took place on June 4-5, 2025 in Jakarta, Indonesia, to explore food system and food security challenges across themes including industrial agriculture, SMEs in agriculture, barriers to cross-border trade, opportunities and challenges for technology and innovation in agriculture, and supply chains.



Photo: Conference photo taken on June 4, 2025, in Jakarta, Indonesia..

The tenth dialogue was a deep dive into needs and challenges in the Mekong and ASEAN region related to food and agriculture investment and trade, with a focus on industrial agriculture, SMEs in agriculture, barriers to cross-border food and agriculture trade, livestock health, opportunities and challenges for technology and innovation in agriculture, and supply chains. Aspects of these topics were covered by previous Policy Dialogues, particularly the March 2024 Policy Dialogue on Fisheries, Agriculture, and Food Security which looked at agricultural productivity and supply chains within the Mekong region. Participants explored policy challenges, best practices, and case studies from the Mekong sub-region as well as the United States.

Participants' policy recommendations from each thematic area at the Policy Dialogue include:

- **Streamline standards by adopting international best practices and ensure traceability along the entire supply chain.** Currently, there is a lack of standards, insufficient traceability, and complex processes for certifications. This can cause issues when products are recalled for food safety or health considerations.
- **Ministries of education, NGOs, and educational systems should encourage, inspire, and prepare youth to enter the agricultural sector.** The agricultural workforce is shrinking as older farmers retire and younger generations are deterred from entering the industry due to low incomes. At the same time, inflation, rising wages in other sectors, and urbanization further reduce labor competitiveness, making farming less attractive compared to higher-paying jobs.
- **Countries should invest in infrastructure connecting rural hubs of agricultural production to urban hubs of consumption and export.** Infrastructure development strategies that have historically focused on export markets must shift to meet increasing domestic and regional demand for agricultural goods and trade by reprioritizing connectivity needs.
- **Business associations, anti-corruption agencies, and policy think tanks should advocate for pathways to reduce red tape.** Bureaucratic processes such as unclear guidelines, regulatory hurdles, or long approval times inhibit the private sector from delivering innovative products to market, which delays project investment and gains.
- **National, provincial, and local governments should work with private sector and local farmers to increase crop and sector resilience to extreme weather events.** Extreme weather events — particularly floods, droughts, and extreme heat — are increasingly impacting crop production, raising costs to farmers and impacting food supply chains.



AGENDA FOR MEKONG–U.S. PARTNERSHIP TRACK 1.5 POLICY DIALOGUE

DAY 1 June 4, 2025, from 8:30 AM - 5:00 PM Jakarta, Indonesia			
8:30–10:00 am	Opening Plenary Opening Remarks <ul style="list-style-type: none"> • Brian Eyler, Stimson Center (Conference Co-Chair) • ASEAN Secretary General Dr. Kao Kim Hourn (virtual) • Ms. Kate Rebholz, Charge d’Affaires, US Mission to ASEAN Plenary Panel: Emerging Trends in Food and Agriculture Trade and Investment Security <ul style="list-style-type: none"> • Moderator: Hai Pham, US -ASEAN Business Council (Conference Co-Chair) • Somboun Phongsavanh, Phongsavanh Bank • Khalil Hamid, USDA Foreign Agricultural Service • Pham Quang Minh, ASEAN Secretariat Food, Agriculture, and Forestry Division 		
10:00 - 10:30 am	Coffee and Tea Break		
CONCURRENT SESSIONS 10:30 am–12:00 am	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> A1: Current state of development/ supply- demand for industrial scale F&A in Mekong/ASEAN Speakers: <ul style="list-style-type: none"> • Moderator: Sabrina Yin, U.S. Meat Export Federation • Somsak Samanwong, Corteva Agriscience • Boonmy Litdang, Dao Coffee • Giang Doan Nguyen, SanHa Co., Ltd </td> <td style="width: 50%; vertical-align: top;"> B1: Current state of development/supply-demand for SME scale F&A in Mekong/ASEAN Speakers: <ul style="list-style-type: none"> • Moderator: Cath Salazar, US-ASEAN Business Council • Van Kien Nguyen, Mekong Organics • Pratsanee Na Keeree, Mae Fah Luang University Sustainability and Entrepreneurship Center • Sakett Sophaseila, Confirel </td> </tr> </table>	A1: Current state of development/ supply- demand for industrial scale F&A in Mekong/ASEAN Speakers: <ul style="list-style-type: none"> • Moderator: Sabrina Yin, U.S. Meat Export Federation • Somsak Samanwong, Corteva Agriscience • Boonmy Litdang, Dao Coffee • Giang Doan Nguyen, SanHa Co., Ltd 	B1: Current state of development/supply-demand for SME scale F&A in Mekong/ASEAN Speakers: <ul style="list-style-type: none"> • Moderator: Cath Salazar, US-ASEAN Business Council • Van Kien Nguyen, Mekong Organics • Pratsanee Na Keeree, Mae Fah Luang University Sustainability and Entrepreneurship Center • Sakett Sophaseila, Confirel
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12:00 - 1:30 pm	Lunch		
CONCURRENT SESSIONS 1:30 PM - 3:00 pm	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> A2: Improving/Facilitating T&I policy for industrial scale F&A Speakers: <ul style="list-style-type: none"> • Moderator: John Edgar, USAID • Long Kimvichet, Cambodia Ministry of Commerce • Anh Phong Nguyen, Institute of Strategy and Policy on Natural Resources and Environment </td> <td style="width: 50%; vertical-align: top;"> B1: Improving/Facilitating T&I policy for SME F&A Speakers: <ul style="list-style-type: none"> • Moderator: Regan Kwan, Stimson Center • Suandi Darmawan Tanuwijanto, Corteva Agriscience • Van Pham Dang Tri, Can Tho University • Anousone Phimmachanh, TIDDIN Sole Co., Ltd </td> </tr> </table>	A2: Improving/Facilitating T&I policy for industrial scale F&A Speakers: <ul style="list-style-type: none"> • Moderator: John Edgar, USAID • Long Kimvichet, Cambodia Ministry of Commerce • Anh Phong Nguyen, Institute of Strategy and Policy on Natural Resources and Environment 	B1: Improving/Facilitating T&I policy for SME F&A Speakers: <ul style="list-style-type: none"> • Moderator: Regan Kwan, Stimson Center • Suandi Darmawan Tanuwijanto, Corteva Agriscience • Van Pham Dang Tri, Can Tho University • Anousone Phimmachanh, TIDDIN Sole Co., Ltd
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3:00 - 3:30 PM	Coffee and Tea Break and then Interactive Wrap-Up		
3:30 - 5:00 pm	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> A3: Animal Health Development Speakers: <ul style="list-style-type: none"> • Moderator: Robin Huang, US-ASEAN Business Council • Pushpanathan Sundram, Ph.D., Elanco Animal Health • Dr. Griff Dagleish, MSD Animal Health • Arrofi Alam, U.S. Meat Export Federation </td> <td style="width: 50%; vertical-align: top;"> B3: Cross-border trade facilitation Speakers: <ul style="list-style-type: none"> • Moderator: Madhurjya Kumar Dutta, Mekong Institute • Will Kent, Commercial Law Development Program • Watcharas Leelawath, Bollinger Company • Garlan Irawan, ASEAN Secretariat • Amanda Brondy, Global Cold Chain Alliance </td> </tr> </table>	A3: Animal Health Development Speakers: <ul style="list-style-type: none"> • Moderator: Robin Huang, US-ASEAN Business Council • Pushpanathan Sundram, Ph.D., Elanco Animal Health • Dr. Griff Dagleish, MSD Animal Health • Arrofi Alam, U.S. Meat Export Federation 	B3: Cross-border trade facilitation Speakers: <ul style="list-style-type: none"> • Moderator: Madhurjya Kumar Dutta, Mekong Institute • Will Kent, Commercial Law Development Program • Watcharas Leelawath, Bollinger Company • Garlan Irawan, ASEAN Secretariat • Amanda Brondy, Global Cold Chain Alliance
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DAY 2

June 5, 2025, from 8:45 AM - 5:00 PM
Bangkok, Thailand

8:45 - 10:15 am	<p>C1: Agricultural Tech and Innovation</p> <p>Speakers:</p> <ul style="list-style-type: none">• Moderator: Jannica Thandra, US-ASEAN Business Council• Suandi Darmawan Tanuwijanto, Corteva Agriscience• Nguyen Van Hung, International Rice Research Institute• Kateryna Levy, Atmo, Inc	<p>D1: Connectivity & Infrastructure Needs</p> <p>Speakers:</p> <ul style="list-style-type: none">• Moderator: Brian Eyler, Stimson Center• Ho Long Phi, Independent Consultant,• Dina Chhorn, Cambodia Development Resource Institute (CDRI)• Nichamon Thongphat, Thailand Development Research Institute
10:15 am - 10:30 am	Coffee Break	
10:30 am - 12:00 pm	<p>C2: Seed Innovation/IP laws and regulation</p> <p>Speakers:</p> <ul style="list-style-type: none">• Moderator: Khalil Hamid, USDA Foreign Agriculture Service• Dr. Kanokwan (May) CHODCHOEY, East West Seeds• Jauhar Ali, International Rice Research Institute• Paranee Adulyapichet, Bayer	<p>D2: Farm to Table: Fostering a Sustainable Agricultural Value Chain in ASEAN/Mekong</p> <p>Speakers:</p> <ul style="list-style-type: none">• Moderator: Angga Antagia, US-ASEAN Business Council• Gabrielle Angriani, Pepsico• Khrisma Fitriyani, Mondelez• Ino Mayu, Seed to Table
12:00 - 1:30 pm	Lunch	
1:30 - 4:20 pm	<p>Synthesis Workshop</p> <p><i>This session included an interactive Mentimeter poll where participants ranked the top challenges identified during Days 1 and 2. They then moved into breakout groups for a facilitated, participatory discussion and group work to identify potential solutions, policy recommendations, and key actors in addressing their chosen theme's challenges.</i></p>	
4:20 - 5:00 pm	Closing Plenary	



THEMATIC AREAS AND RECOMMENDATIONS

The key concerns and recommendations related to the thematic categories discussed in this report were the result of an interactive workshoping process conducted with Dialogue participants during a synthesis workshop on Day 2. Throughout the conference, the organizing team took detailed notes on the specific concerns, challenges, and gaps that were identified during session presentations and discussions. Key problems were identified across five thematic categories covered during the conference sessions: regulatory trade barriers, labor issues, connectivity and infrastructure, supply chain, and technology and innovation.

Attendees ranked the top problems among these sub-sets through an interactive Mentimeter poll and then collaborated in thematic breakout groups to identify and draft policy recommendations and key actors involved in addressing each of the top key issues identified in the poll. The breakout groups drafted policy recommendations and solutions for individual issues and presented them to the group for a final voting process. The top recommendations for each theme, as determined by the participants through this voting process, are included in this summary report.

Photos: Synthesis workshop activities at the Policy Dialogue in Jakarta, Indonesia on June 5, 2025. Photos courtesy of Brian Eylar.





REGULATORY TRADE BARRIERS

While ASEAN has benefited from regional trade agreements that slash internal import tariffs and move towards a shared market, complex procedures such as export certifications, non-tariff barriers including licensing delays, divergent customs procedures, and varying food safety and licensing requirements complicate trade in food and agricultural products. This is particularly important for small and medium enterprises (SMEs), which are the backbone of regional food and agriculture systems but face unique capacity challenges in terms of compliance and see up to a 40% increase in export costs under the current regulatory regime. While the Greater Mekong Subregion (GMS) Cross-Border Transport Agreement (CBTA) seeks to streamline procedures, only 40% of eligible routes have implemented its provisions to facilitate cross-border trade. As a result, SMEs account for only 20% of formal cross-border trade although they account for 97% of regional agribusinesses.

Previous Policy Dialogues touched on some of the underlying frameworks and infrastructure for food and agricultural trade: Participants at the Policy Dialogue on Connectivity in 2022 evaluated implementation of the CBTA and management of cross-border transportation and trade from numerous sectors including food. This Policy Dialogue had four sessions that focused on food and agricultural production and trade, with two focusing on industrial scale production and two on SMEs. These discussions included a deep dive into the current systemic regulatory barriers and gaps that inhibit food and agricultural trade; considered pathways for smarter trade policies, collaboration between private sector and government to streamline and modernize existing customs procedures, certification standards, and other frameworks; and explored how SMEs can be more effectively integrated into regional and global trade through capacity-building and government programs that promote SME competitiveness.

Photo: [Aerial Shot of Cargo Ship on Sea](#), courtesy of Pexels user Tom Fisk.

PARTICIPANTS' PRIORITY ISSUES AND POLICY RECOMMENDATIONS:

- 1. Streamline standards by adopting international best practices and ensure traceability along the entire supply chain.** Currently, there is a lack of standards, insufficient traceability, and complex processes for certifications. This can cause issues when products are recalled for food safety or health considerations.
 - The private sector, local industry associations, and regional governments should adopt international standards for phytosanitary measurements (ISPM) related to the movement of seeds (ISPM 38) and wood packaging (ISMP 15) to prevent the spread of pests.
 - Industry associations should implement and mutually recognize Food and Agriculture Organization's Codex Alimentarius (CODEX) standards.
 - Industry should follow International Cooperation on Harmonization of Technical Requirements for the Registration of Veterinary Medical Products (VICH) standards.
 - ASEAN governments should harmonize the registration process for veterinary medicine in line with VICH standards and adopt the International Union for the Protection of New Varieties of Plants (UPOV) membership and guidelines.
 - The World Trade Organization should promote science-based regulations and standards for trade.
 - Grocery stores should raise consumer trust in supply chain security through marketing and communication about traceability efforts.
 - The World Organization for Animal Health (WOAH), slaughterhouses, and food regulators should enforce animal health and food standards at production sites.
- 2. Government regulators should reduce bureaucratic red tape by harmonizing standards.** Regulatory hurdles, extensive bureaucratic processes and long approval times, and other non-tariff measures such as export certifications or pre-shipment inspections can add to costs, thereby increasing food price costs and reducing access to food for consumers. In many cases, new technologies that improve efficiency are available globally but have yet to be approved for local market use. Regulators need to balance streamlining regulations and ensuring product safety assurance.
 - Government regulators should clarify non-tariff trade barriers by recognizing international standards rather than requiring local certifications.
 - Trade associations such as the U.S. Meat Export Federation and the US-ASEAN Business Council, think tanks such as ERIA, and businesses should clearly communicate the challenges and inefficiencies posed by non-tariff barriers and certifications.
 - Trade groups should push for the government to review technologies within a specific timeframe to help accelerate the entry of new agricultural technology.
 - Ministries of agriculture and trade should reduce bureaucratic red tape by minimizing the number of regulatory offices involved in approvals and certifications and mandating a coordinating ministry.
 - Ministries of agriculture and trade and local authorities should harmonize standards to avoid conflict.
- 3. ASEAN government regulators should ensure that food safety regulations are science-based and invest to support high-quality local industry.** Food safety is an emotionally and politically charged issue, and consumer demand and domestic political interests can often influence regulatory requirements. Such regulations may limit imports in the name of food safety, but where they are driven by misinformation or efforts to protect local industry they can lead to supply and demand mismatches if local industry cannot sufficiently meet demand.
 - Government regulators should adopt international standards, such as the CODEX and WOAH guidelines.
 - Foreign direct investors, major conglomerates, and venture capital funds should support startup accelerators and incubators trialing biotechnology to increase productivity and nutritional quality of foods in ASEAN markets.
 - Universities and educational programs should encourage young people to enter the agricultural workforce by supporting the use of advanced technologies and industrial equipment.
 - Development banks, including the Asian Development Bank, Asian Infrastructure Investment Bank, and development partners, should target funds towards key roads, water, and energy infrastructure to support local industry.



Agriculture currently provides 30% of all jobs in Thailand, 33% in Vietnam, 36% in Cambodia, 45% in Myanmar, and 70% in Lao PDR. This is a significant drop from 30 years ago when the majority of all Lower Mekong populations were involved in agriculture and reflects a broader shift towards urbanization, industrialization, and workforce mobility. Youth in recent years have shifted away from the agricultural sector due to low wages and upward mobility opportunities in other sectors, leading to an aging workforce and uncertainty about the sector’s future. At the same time, mechanization and digitalization of agriculture can introduce significant efficiencies, and the adoption of new seed varieties or regenerative agricultural techniques can increase income, but a lack of knowledge, familiarity, or upfront funding availability can inhibit these advances.

Consideration of workforce issues has come up at numerous Policy Dialogues, most particularly the fourth MUSP Track 1.5 Policy Dialogue on Human Resources and Capacity-Building which covered training, certification, and skillset gaps across a broad range of sectors. While a workforce focus was not written officially into the agenda for this Policy Dialogue, participants raised challenges related to skills, training, and capacity in a number of sessions. Participants expressed significant concerns about the future of agriculture during four sessions within the context of an aging workforce and youth choosing to move away from agriculture towards trendier, more respected, and better paying careers. Concerns about shortages of skilled agricultural laborers came up a few times, particularly in Lao PDR and sometimes within the context of needing to industrialize to improve efficiency.

Photo: [People on Working on Field](#), courtesy of Pexels user Quang Nguyen Vinh. .

PARTICIPANTS' PRIORITY ISSUES AND POLICY RECOMMENDATIONS:

1. **Ministries of education, NGOs, and educational systems should encourage, inspire, and prepare youth to enter the agricultural sector.** The agricultural workforce is shrinking as older farmers retire and low incomes deter younger generations from entering the industry. At the same time, inflation, rising wages in other sectors, and urbanization further reduce labor competitiveness, making farming less attractive compared to higher-paying jobs.
 - Ministries of education, local educational systems, and NGOs that support extracurricular and social activities should implement programs to increase awareness of opportunities in the agricultural sector starting in primary school.
 - Local government agencies should partner with social media influencers to inspire youth by marketing success stories of successful breakthroughs and business initiatives in the agricultural sector.
 - Community associations, vocational schools, and the private sector should partner to support youth community agriculture programs and skills development.
 - Ministries of education and rural development and international financial institutions should subsidize agricultural education.
 - Agriculture extension groups, tech companies, and NGOs supporting extracurricular and social activities should support tech and innovation programs for rural communities and students.
 - Universities and government agencies for agricultural development should support farm development pathways including business training for small-holder farm owners to scale up activities.

2. **Local authorities should promote small-scale agribusiness growth through supporting education on new technologies or approaches and providing targeted technical and financial assistance to adopt new technologies or farming practices.** Farmers prioritize short-term profits over long-term production because they lack market incentives, financing, or proof of higher returns. Given limited resources, many farmers — especially smallholder farmers — are risk averse.
 - Local universities, NGOs, and agriculture extension groups should build capacity among farmers through knowledge-transfers and resource networks.
 - Large enterprises and major agri-businesses should incentivize the local adoption of technologies through providing funding partnerships and supporting collaborative pilot projects between experts and local farmers.
 - Local government and agribusinesses should organize field site visits and field trainings to pilot projects for the use of new technologies or farming approaches for local farmers.
 - Agricultural cooperatives, agriculture exporters and traders, and relevant offices in financial institutions should promote commercialization by increasing short-term financial assurances.
 - Tech companies, export agencies, and development-oriented NGOs should promote commercialization by improving access to digital commercial markets for local stakeholders.
 - Agricultural co-operatives, farmers unions, and community leaders should promote coordination and trust-building between farmers and traders to support commercialization and scale-up.



CONNECTIVITY AND INFRASTRUCTURE

Despite the significant growth in agricultural production across the Mekong region, infrastructure investment and development have failed to match the increasing demands of food supply chains. The disconnect between production capacity and distribution capability represents a critical constraint on the region's food sector development. These disconnects carry real costs: Up to 30% of perishable goods spoil before reaching consumers, while transport inefficiencies add 15%-20% to the price of staple foods.

Participants in previous Policy Dialogues have made recommendations for stronger regional connectivity and infrastructure development to support broader trade. Participants in the second MUSP Track 1.5 Policy Dialogue on Energy & Infrastructure recommended the streamlining of economic corridor development through regional harmonization of standards, the centralization of relevant data on projects, and empowerment of local authorities in the transparent management of fees, procedures, and other legal processes. In the third MUSP Track 1.5 Policy Dialogue on Connectivity, half of the conference focused on issues related to economic and digital connectivity. The conversations touched on various topics, including post-COVID support for SMEs, disproportionate trade benefits from multilateral Cross-Border Trade Agreements, and gaps in ICT adoption and the digital divide exacerbated by the COVID-19 pandemic. This Policy Dialogue focused on the specific needs for the agricultural sector and food trade.

Photo: [Food Delivery Rider in Manila Near Flower Market](#), courtesy of Pexels user visionsofnico.

PARTICIPANTS' PRIORITY ISSUES AND POLICY RECOMMENDATIONS:

1. **Countries should prioritize investment in infrastructure connecting rural hubs of agricultural production to urban hubs of consumption and export.** Infrastructure development strategies that have historically focused on export markets must shift to meet increasing domestic and regional demand for agricultural goods and trade by reprioritizing connectivity needs.
 - Relevant government ministries, with private sector support, should create responsive financial policies that focus on rural hubs of agriculture.
 - Commerce and agriculture authorities, business and agriculture associations, and the e-commerce private sector should promote rural e-commerce through digital literacy programs.
 - National-level ministries and regional development partners should realign national connectivity plans with neighbors and the region.

2. **Governing agencies should incorporate private sector insights into strategic planning processes related to regional connectivity infrastructure development.** Connectivity mechanisms and infrastructure developed through national development plans don't necessarily address the needs of the private sector, and their input is rarely considered or addressed.
 - Relevant ministry agencies and trade and commerce associations should develop mechanisms to track private sector development and formalize methods to monitor said development.
 - Development partners and government agencies should create platforms for businesses to engage regionally, foster innovation, and create a network to identify financial opportunities for SMEs.
 - Dialogue partners and convening bodies should hold regional dialogues to match businesses, finances, and standards.



SUPPLY CHAINS

Recent years have seen numerous disruptions to supply chains, ranging from the COVID-19 pandemic to the war in Ukraine to renegotiations of tariffs and other trade policies that introduce short-term uncertainties and volatilities. Divergent food safety standards and licensing processes cause delays, and in many cases, infrastructure investment has failed to keep pace with increasing cross-border food and agriculture trade. Bottlenecks and delays impact food and agricultural products significantly given limited lifespans, with implications for food affordability and accessibility for low-income families and economies that rely on imports.

Participants also focused on supply chains at the Policy Dialogue on Fisheries, Agriculture, and Food in early 2024, which held two sessions exploring supply chain volatility from disruptions, including COVID-19 and the start of the war in Ukraine; ways that digital technology and communications can improve supply chains; and opportunities to shift away from high-input and supply chain vulnerable approaches to farming to improve local resilience to shocks. Supply chains were woven through this Policy Dialogue, which built on previous discussions by examining impacts of shifting trade policies and associated uncertainties, ongoing hyperinflation in some economies such as Lao PDR, and tensions between viewing food security through the lens of domestic production versus a diversity of supply chains.

Photo: [Early morning agitation: Floating market Cai Rang, Vietnam](#), courtesy of Flickr user Nathalie Capitan and used under a Creative Commons license.

PARTICIPANTS' PRIORITY ISSUES AND POLICY RECOMMENDATIONS:

- 1. Business associations, anti-corruption agencies, and policy think tanks should advocate for pathways to reduce red tape.** The private sector faces too much red tape and bureaucratic processes such as unclear guidelines, regulatory hurdles, or long approval times to get innovative products to market, which delays project investment and gains.
 - Business associations and national associations such as women's and farmer organizations should create a platform for shared advocacy towards government agencies to address bureaucratic obstacles.
 - Trade and investment agencies should establish feedback mechanisms and regular timelines for reviewing and adjusting processes to streamline trade.
 - NGOs should coordinate with farmers to improve awareness of the grassroots impact of bureaucratic procedures, with particular focus on limitations and burdens on SMEs.
- 2. National governments should prioritize investments and agricultural practices that are resilient to increasing climate variability in order to reduce vulnerability to climate change.** Climate change has led to unpredictable weather, unstable yields, crop loss, and higher demand for better cold chain connectivity to reduce impacts. ASEAN is adjusting 2026-2030 agricultural targets to recognize these foundational challenges and seeks partners with the appropriate technical expertise
 - National governments should prioritize investment in climate-smart solutions in infrastructure, technology, and other innovative approaches that build resilience.
 - Development partners, development banks, and investors should consider climate risk and climate-smart adaptation in investment decisions.
 - Farmers should work with academic institutions, researchers, and multilateral organizations such as the East West Seed Knowledge Transfer program to transform traditional practices and knowledge to forward-looking sustainable agricultural practices.
 - Business chambers, industry associations, and research and development communities should coordinate with academics and NGOs to effectively exchange knowledge on technological adaptation, best practices, data analysis and projects on trade, weather, and market access.
- 3. Government agencies should strengthen implementation of existing laws and regulations.** Currently, laws and regulations are enforced weakly and often have complex procedures that are difficult to navigate for non-experts and sub-optimally coordinated across jurisdictions. This has particular impact on SMEs, given their limited capacity.
 - Anti-corruption agencies and committees at the national, federal, and local levels, the judiciary, and outside monitors should enhance anti-corruption mechanisms.
 - National governments should implement the ASEAN Single Window or a National Single Window policy.
 - Development agencies should support governance, technical, and financial capacity-building efforts for relevant government personnel.
 - The ASEAN Secretariat should help improve information sharing and harmonization of laws and regulations across national borders.
 - The tech sector can provide streamlining solutions to help make complicated procedures and differences in national laws understandable and accessible to SMEs.



TECHNOLOGY AND INNOVATION

ASEAN farmers today face many challenges, including limited digital literacy, the high cost of accessing advanced technologies, and restricted financial resources. These barriers are compounded by the increasing pressures of environmental disasters and resource scarcity. Adaptation and innovation will be key to ensuring the future of agricultural production, as communities increasingly adopt artificial intelligence and digital solutions to adapt to changing weather patterns and seek resilient seeds to ensure productivity and food security amid extreme weather events. In the Mekong region, resilient crop varieties could help farmers adapt to increasing droughts and floods. Needs vary significantly by country: Vietnam's rice farmers require drought-tolerant strains, Thailand's cassava growers require disease-resistant varieties, and Cambodia's vegetable producers seek higher-yielding seeds. Currently, complex intellectual property systems and regulatory barriers slow the adoption of improved seeds. By making strategic investments in new technologies and fostering supportive policies to support scale-up and adaptation, ASEAN can become a global frontrunner in agri-tech innovation and ensure long-term productivity.

The eighth Policy Dialogue on Fisheries, Agriculture, and Food Security included a sub-theme of innovation and technological advancement, but those sessions focused on building resilience of the future food system. This Policy Dialogue took a deep dive into specific barriers to technological adoption within the agricultural sector and new opportunities linked to emerging technologies. The first session considered adoption challenges for farmers, including a lack of policy clarity and high upfront cost, a lack of good data for new seeds or crops in specific localities, and risk aversion. Potential responses include hyper-localization of advice from new crop suppliers, the use of AI-driven weather forecasting tools that can provide hyper-local information, and the use of demonstration farms or pilot cases to drive awareness and understanding. The second session focused on regulatory barriers and intellectual property (IP) obstacles to the use of improved crop seeds. Key takeaways included the increase of food insecurity; the relative lack of regulatory and IP frameworks to support adoption of genetically modified crops and allow access to innovative technologies; access challenges for small-scale farmers to new seeds and technologies; and concerns about balancing local values and agricultural inheritance with innovative and resilient varieties of rice and other key crops.

PARTICIPANTS' PRIORITY ISSUES AND POLICY RECOMMENDATIONS:

- 1. National, provincial, and local governments should work with private sector and local farmers to increase crop and sector resilience to extreme weather events.** Extreme weather events — particularly floods, droughts, and extreme heat — are increasingly impacting crop production, raising costs to farmers, and impacting food supply chains.
 - Government agencies responsible for weather forecasting should work with tech firms, AI firms, and satellite providers to update and improve forecasts.
 - Local governments should work with farmers, the private sector, and other local community leaders to develop early warning systems for extreme events.
 - Provincial governments should invest in appropriate social infrastructure to respond to weather crises, such as effective and adaptive management processes for reservoirs and the training of firefighters.
 - NGOs, academia, and various levels of government can work with farmers to develop adaptive crop management processes, such as precision farming, and increase mechanization to avoid crop losses. Seed suppliers should work with farmers to increase utilization of multi-stress-tolerant crop varieties.
 - Academic experts and government researchers should consider risks and benefits of active interventions such as cloud seeding or geoengineering.
- 2. Mekong governments should provide policy support and enabling conditions for the modernization of sustainable agriculture systems.** Intensive cropping and incorrect use or overuse of fertilizer can affect soil health, creating soil imbalances and affecting productivity. This can be addressed through changes to farming practices and the use of modern industrial technologies, but this requires buy-in from farmers, government actors, and the private sector.
 - Intergovernmental organizations and think tanks should define the scope and requirements for modernization at the national level.
 - Governments should endorse specific practices to ensure long-term agricultural output, such as soil health monitoring, regenerative agriculture practices, organic farming, and alternative crops to corn and rice.
 - Governments should develop a multi-stakeholder platform with trade associations, research institutes, and NGOs for ongoing dialogue about gaps and needs.
 - International development banks and charitable foundations should provide initial financial support for farmers seeking to shift behavior, potentially with government backstops to manage risk.
 - Educators, farming extension services, and farmer cooperatives should facilitate demand, driving technology adoption.
 - Public-private partnerships should support scaling-up of approaches that prove viable in local markets.
- 3. Government agencies responsible for agriculture should cooperatively develop a regional ASEAN digital hub for the collection, dissemination, and training programs on technology advances in agriculture.** Currently, there is a lack of information-sharing on technological advances, which limits uptake by farmers and other practitioners.
 - National agriculture agencies should work with academia, the private sector, and ASEAN Secretariat to collect, disseminate, and demonstrate technology advances, including the provision of training for farmers.
 - Farmer organizations should create a cross-country learning alliance that ties together expertise across government, farmers, the private sector, and researchers to improve information sharing.
 - Governments should fund academia, think tanks, policy institutes, and trade organizations to hold international research and development (R&D) communication and knowledge exchange activities such as conferences, symposia, and forums.

Photo: [vertical](#) courtesy of Flickr user Ark. Agricultural Experiment Station and used under a Creative Commons license.



FEEDBACK

Thirty-one of the 54 conference attendees shared feedback in a survey following the dialogue, and most attendees indicated that the dialogue was an extremely positive and productive experience.

Key takeaways from the anonymous evaluation surveys include:

- 97% of attendees indicated that they learned some, a lot of, or all new information through participating in the Dialogue, with 71% indicating they learned a lot of or all new information.
- All attendees said they would recommend participating in a future Dialogue to a colleague.
- 97% felt that they developed insight into a relevant policy, human resources, or sustainability challenge facing the region.
- 87% said that the Dialogue helped them identify a local Mekong stakeholder(s) with whom they shared common interest, and 84% said the same for identifying US-based and international development partner stakeholders.

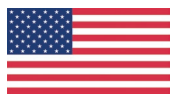
Many survey respondents shared appreciation for the high quality of insights and information from a range of stakeholders, particularly SMEs; the open, collaborative, and interactive session design; and the explicit focus on challenges and identification of specific recommendations that emerged from the broad discussions. There was a relatively even split among respondents concerning the most rewarding session, with equal votes for the sessions on Cross-border Trade Facilitation, Connectivity & Infrastructure Needs, and Fostering a Sustainable Agricultural Value Chain, and many participants said that all of the sessions were similarly relevant and useful.

There were a few areas of improvement identified. While most attendees indicated that the right people were in the room to participate in the Track 1.5 Policy Dialogue, about a quarter felt that more government officials should have been present, including provincial or working-level officials rather than policymakers. Recommendations for improving future conferences included providing presentations, reading materials, and a participant list ahead of time. Additional suggestions included avoiding parallel sessions or ensuring that there is a more even split when parallel sessions are hosted to ensure balanced opportunities for discussion.

Photo: Participants filling out survey at synthesis workshop on June 5, 2025. Photo courtesy of Brian Eyler.

NEXT STEPS

This was the tenth Mekong-U.S. Partnership Track 1.5 Policy Dialogues in this multi-year series of workshops, with one final Policy Dialogue on Digital Economy held afterwards in Bangkok, Thailand. The Policy Dialogues have served as an opportunity for stakeholders from the Lower Mekong sub-region and the United States, including relevant government ministries, private sector representatives, NGOs, and development partners, to identify lessons-learned, build collaborative partnerships, transfer best practices, and suggest joint pathways to meet policy needs. The Stimson Center has been engaged on Mekong issues for over a decade and plans to build on the progress and insights gained from these events through ongoing programming and analysis related to the food-water-energy nexus, fisheries and agriculture, and innovative uses of data to support regional development.



STIMSON

ABOUT THE POLICY DIALOGUE SERIES

This summary report provides an outline and recommendations derived from discussions held as a part of the Mekong-U.S. Partnership Track 1.5 Policy Dialogue series. The Policy Dialogues are a series of eleven conferences taking place between 2021 and 2025 that are generously supported by a grant from the U.S. Department of State’s Mekong-U.S. Partnership. Cross cutting principles of inclusivity, resilience (including climate), and collaboration will be applied to all conferences in this series.

The U.S. Government launched the Mekong-U.S. Partnership in 2020 to expand cooperation with the five countries of the Lower Mekong sub-region on strategic challenges and shared priorities under the Partnership’s four areas of cooperation (nontraditional security, natural resources management, economic connectivity, and human resource development). The Mekong-U.S. Partnership builds on the strengths of the Lower Mekong Initiative’s development-focused agenda by cooperating on strategic sub-regional issues and challenges. Each area of engagement under the Mekong-U.S. Partnership is supported by a flagship project. The Mekong-U.S. Partnership’s Track 1.5 Policy Dialogue series serves as the flagship program of the Mekong-U.S. Partnership’s human resources development area of engagement.