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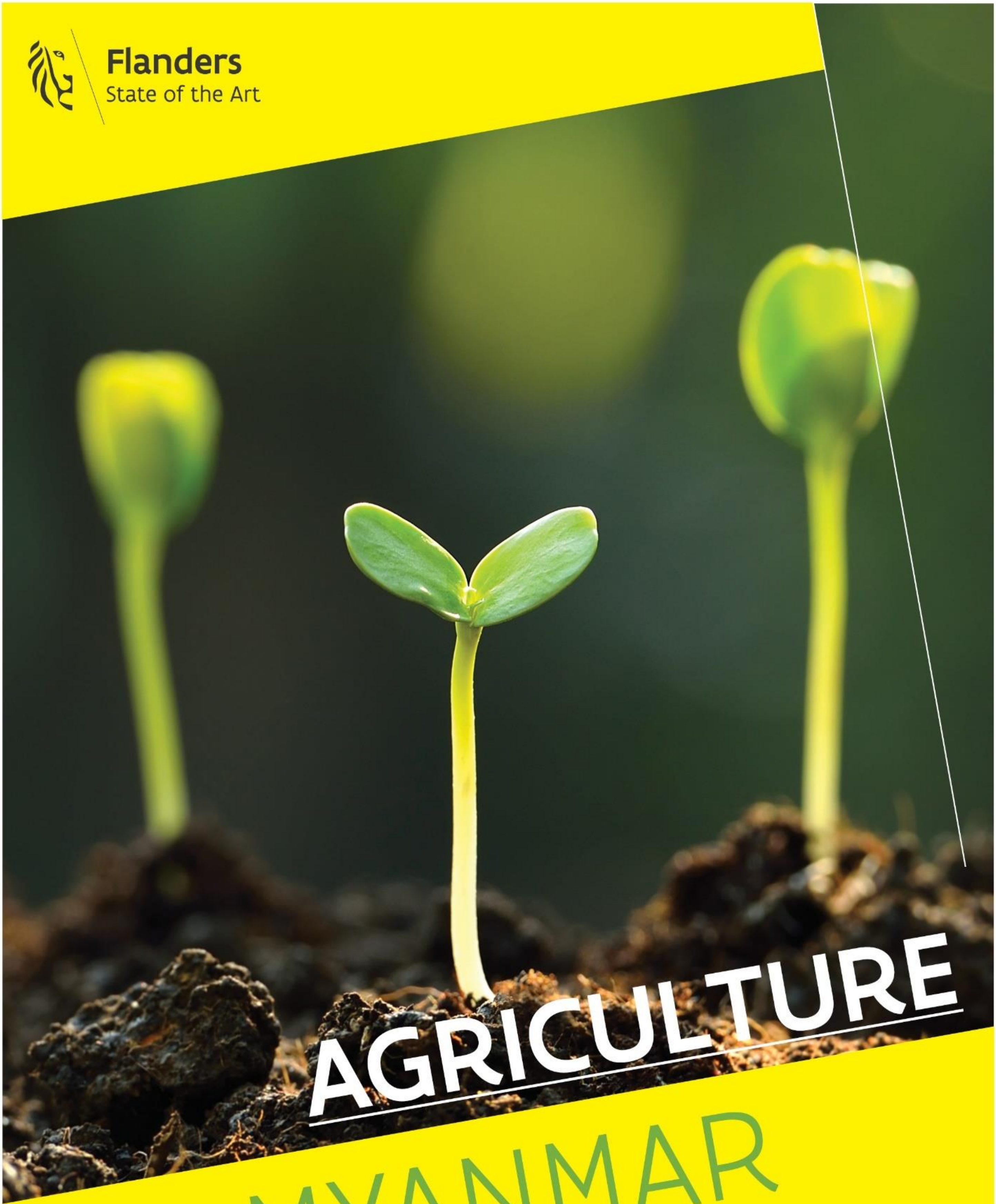

AGRICULTURE IN MYANMAR

FLANDERS INVESTMENT & TRADE MARKET SURVEY

AGRICULTURE IN MYANMAR

Report 2020

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CONTENT

1. SUMMARY

Agriculture is the backbone of Myanmar's economy. In 2018 it contributed 23.3% to GDP (USD 66.7 billion), 9% to export (USD 14,851 million) and 50% to total employment (22 million).

However, Myanmar has lower agriculture productivity and the lowest profits from rice production compared to those achieved by farmers in Asia's other rice bowls. Low productivity is a result of multiple factors. This includes limitation on data and information, on timely and quality input, non-investment in R&D, limited quality control measures, technology, farming techniques and systems, climate change and other stresses. Despite rising awareness for organic fertilizers by higher export requirements, organic fertilizers are not yet widely available in the market. There is also a limited distribution of quality seeds and limited irrigation.

However the country has the strength of a growing domestic market and a strategic location for international exports. Besides, the government is strongly taking some policy actions to develop the agriculture sector. Despite some challenges, the growth potential of Myanmar's agriculture is expected to continue and more international trade opportunities are opening up in the upstream and downstream supply chain.

2. BACKGROUND SITUATION

2.1 AGRO-ECOLOGICAL ZONES

The cultivation on 29 million acres (18% of cultivable land area) yearly yields about 25 million tons of more than 40 kinds of crops.

Myanmar's land can be divided into three principal agro-ecological zones:

- A hilly and mountainous area, mainly in the Shan State in the east, inhabited by approximately 6.7 million inhabitants and engaging in cultivation of a wide range of rain-fed tree crops and horticulture products along with rice, maize and pulses;
- A central dry zone where you have an estimated 15.8 million population and the cultivation of a range of rain-fed crops;
- A delta area and coastal zone in the south where you have a population of 22.8 million inhabitants, engaging in lowland rice cultivation and aquaculture production.

According to the World Bank, the irrigation coverage in Myanmar is relatively low. In 2014-2015, only 15% of the agricultural land was part of public irrigation systems compared to about 30% for Indonesia and Thailand, 50% for China and 70% for Vietnam.

2.2 PRODUCTION STATISTICS

Crop production accounts for 72% of agricultural output. The three main crop groups are paddy, beans and pulses, and oilseed crops.

According to Eurocham's Agriculture Guide 2019, rice paddy remains the dominant production crop, accounting for 45.7% of the harvested area and 53.4% of production value amongst major crops. While rice has also been historically the major agricultural export, beans and pulses now generate the higher export earnings, contributing USD 1,046 million in 2015–2016, with the three other major exporters; rice, livestock and fisheries providing between USD 200-500 million each.

Paddy

In FY 2016-2017 paddy production amounted to about 25 million tons and decreased by 0.02%. The production is expected to further decrease due to climate changes such as higher temperatures, drought, flooding and other. The sector is also challenged by its demand of water, land, fertilizers, pesticides and greenhouse gas emissions.

Also the domestic consumption of milled rice is expected to decrease due to changing consumer habits in favor of fast food and baked goods.

The "Climate Smart Rice Project" funded by the Norwegian Agency for Development Cooperation (NORAD) and the Swiss Agency for Development (SDC) will introduce sustainable standards and best practices to 4,000 smallholders over the coming three years to boost the sector's production. The project will be implemented by a consortium of partners including UN Environment, the Sustainable Rice Platform, Helvetas Myanmar and PRIME Agri Group according to UN Environment.

2.2.1 Pulses

Pulses production decreased by 8.7% from 4.6 million tons in FY 2016-2017 to 4.2 million tons in FY 2017-2018. The export in Metric Ton/MT[1] decreased by 3% in the same period.

India is the major customer for pulses followed by Bangladesh, Pakistan, Nepal, Dubai, Malaysia, Indonesia, China (Taipei), Japan and European countries.

The export as well as the production of pulses is expected to further decrease due to the lower demand from India and the pulled down price of pulses.

2.2.2 Oilseed crops

Oilseed crops production decreased by 1.6% from 2.4 million tons in FY 2016-2017 to 2.36 million tons in FY 2017-2018 due to the shortages of peanut meal and the by-product of milling (which is used as livestock feed).

The decline of oil mills is affected by the increasing production cost, the yearly price rise of raw materials and the weak policy on the production side.

Qualified oil extracted from oilseeds is limited due to the focus on domestic consumption with small-scale oil millers using undeveloped oil extraction technology.

2.2.3 Maize

Maize production increased by 4.3% from 1.8 million tons in FY 2016-2017 to 1.9 million tons in FY 2017-2018, whereas the maize export approximately decreased by 37% in the same period (worth USD 9 million or 48,000 tons).

According to Mordor Intelligence "Myanmar Corn Seed Sector Analysis – Growth, Trends, And Forecast (2019 – 2024)", hybrid maize corn cultivars occupy a 95% share in the corn seed sector whereas open-pollinated varieties only count for 5%. The government has a collaboration with the International Maize and Wheat Improvement Centre (CIMMYT) to develop commercial hybrids which are suitable for the agro climatic conditions in the country. Currently, most of the seed providers in the country are foreign investors from Thailand and China.

[1] MT = metric ton, 1,000 kg

The maize export is expected to increase due to China that has resumed maize importing from Myanmar, the traders that are exploring import opportunities into South Korea and the domestic demand for grain that has also increased due to the demand from animal food factories.

2.2.4 Wheat

In FY 2017-2018 there was a production of 123,252 tons of wheat, which represented a decrease of 23.8%. In the meantime, the wheat flour import rose substantially, from 2000 MT (worth USD 0.5 million) in FY 2013-2014 to 40,000 MT (worth USD 14.9 million) in FY 2017-2018.

The 2018 Grain and Feed Report of the United States Department of Agriculture (USDA) expressed that approximately 44% of total wheat flour is used for noodles, 34% for bakery and 22% for others. The wheat market is dominated by local key players such as U Kyu Family holding that has a market share of over 55% while Capital Diamond Star Group has a market share between 30% and 35%. There are about 25 wheat flour mills in Mandalay (the second largest city of Myanmar), using around 30-60 MT/day of mostly local wheat grain, according to demand.

Wheat consumption is growing due to the expansion of the appetite for Western food, specifically pasta, snacks and baked goods derived from wheat flour, as the country moves away from its traditionally rice-heavy diet.

The 2018 Grain and Feed Report of the United States Department of Agriculture (USDA) also stated that the wheat flour consumption is expected to continue to grow due to changing lifestyles and more demand for convenience food, especially by young people. The market of bakeries, cafes and fast food stores is already increasing in order to fulfill that demand around the country.

According to S&P Global Platts, a ship with 22,000 MT of US-sourced dark northern spring wheat (worth more than USD 6.9 million) was discharged on May 9, 2019 in one of the ports in Yangon.

2.3 TRADE DATA AND MAJOR TRADING PARTNERS

In FY 2017-2018 the total export of Myanmar amounted to USD 14,851 million of which agricultural products represented approximately 9% (worth USD 1,324 million), consisting of:

- Rice and rice products (1.7 million Metric Ton/MT)
- Pulses (1 million MT)
- Maize (48,000 MT)
- Raw Rubber (45,000 MT)
- And other agriculture products.

Details on the export of rice & rice products:

Rice export increased by 149% from 691,000 MT in FY 2016-2017 up to 1,7 million MT in FY 2017-2018.

Regional spread of the rice export in MT:

- 42.1% of total rice export is sold to Africa (14.5% to Ivory Coast and 27.5% to other African regions);
- 26.5% to Europe (14.4% to Belgium, 1.3% to the Netherlands and 10.8% to other European countries);
- 24.3% to Asian countries other than Southeast Asian countries (China 0.5%, Sri Lanka 4.8%, Bangladesh 15.1% and other countries 3.8%);

- 6.4% to Southeast Asian countries (Malaysia 0.46%, Indonesia 2.9%, Singapore 1.7%, Philippines 0.6% and Vietnam 0.7%);
- 0.11% to Middle East countries;
- 0.5% to other regions of America;

The export of rice is expected to increase by 20% in FY 2019-2020 due to the high demand from China following the MoU on an additional rice export quota of 100,000 tons that was signed in April 2019 between Myanmar and China.

The total import value of all products in Myanmar in FY 2017-2018 was USD 18,687.0 million. Some of Myanmar's major import items in the agricultural sector are: edible oils; sugar; fertilizers; rubber; wheat flour; spices and taste powder. There are no detailed data available of imported items per country.

3. UTILIZATION OF FERTILIZERS

According to the World Bank, the use of fertilizers in Myanmar is estimated at just 60kg/ha, compared to 300 kg/ha in Thailand and 700 kg/ha in Vietnam. It is about a total of 3.5 million tons of fertilizers used in Myanmar's agricultural sector consisting of: 44% Urea; 7.8% T-Super; 4% Potash; 40% Compound and 3.7% of other fertilizers. Overall, the application of chemical nutrients in Myanmar represents only 10% of the Southeast Asian regional average.

Farmers' knowledge regarding fertilizers and fertilizer use in general, is limited. Farmers mentioned that the way they determine what type and how much fertilizer they use mainly depends on what they see around them in the village. They look at what other farmers are using or what they were doing in the past season. In several villages, nobody knew about soil testing. Due to lower education of the farmers (they have limited capacity of writing and reading the local language), the use of English on the packaging leads to unawareness on how to come to an effective use of fertilizers in the farms. Most of the fertilizers are imported and repacked by the local distribution.

Regarding the types of fertilizers; chemicals and organic, 98.8% of the local farmers are using chemical fertilizers, according to the research of the Myanmar Food Security Working Group (FSWG) in the delta and coastal areas in 2015. This may be due to the quicker results and easy access to more harvesting. On the contrary the use of organic fertilizers is still limited in Myanmar. It is difficult to educate the farmers who work in an old method of farming; a primitive style of farming that involves the intensive use of indigenous knowledge, traditional tools and natural resources, as well as in a non-mechanized way, learned from the older generation and only look for short-term winnings. Some companies are transforming into organic agriculture to meet the global demand; however organic fertilizer products are not yet widely available on the market, whereas homemade organic fertilizers are sourced from the waste of poultry and swine.

4. GROWING MARKET WITH BOTTLENECKS

The Myanmar's agricultural sector is largely comprised of smallholder farms between one and five hectares and the value chain remains strongly traditional compared to the neighboring countries. And agricultural productivity in Myanmar is lower than the neighboring countries. For example, by the findings of the World Bank, to harvest rice, one day of work generates only 23 kg of paddy in Myanmar, compared to 62 kg in Cambodia, 429 kg in Vietnam and 547 kg in Thailand. Lack of information on the global supply and demand conditions, limited access to crop management knowhow and farming techniques, a lack of good quality crop seeds and the climate change are negatively impacting the productivity of Myanmar's agricultural sector.

4.1 FARMING TECHNIQUES & SYSTEMS

Compared to international standards or even regional peers, agriculture in Myanmar is very labor-intensive:

- According to the World Bank, farmers in f.e. Ayeyarwady (a region in Myanmar where the major rice production takes place) spend more than 100 days per hectare on monsoon rice paddy compared to 52 days in Cambodia, 22 days in Vietnam and 11 days in Thailand.
- Farm earnings per worker in Myanmar range between ½ and 1/3 of the levels in neighboring countries.
- Daily wages for farm workers range from roughly USD 2 to USD 3.5 – which are among the lowest in Asia – with wages at their peak during the dry season.
- Myanmar has the lowest profits from rice production compared to those achieved by farmers in Asia's other rice bowls.

4.2 SEED

Poor quality seeds result in the poor agricultural sector of the country. High-quality seeds account for less than 10% of the total quantity used by the country's farmers. 90% of those high-quality seeds are only used by maize growers while less than the remaining 10% of the seeds are used in the cultivation of rice, oil crops, beans and pulses.

According to the World Bank, the supply of certified paddy seeds only meets about 1% of the demand. The Department of Agriculture under the Ministry of Agriculture, Livestock and Irrigation recently developed "The Road Map for Myanmar's Seed Sector: 2017-2020" which estimates that the farmers have access to less than 10% of certified rice seeds and less than 1% of certified seeds for other crops.

4.3 CLIMATE CHANGE

According to the Global Climate Risk Index (released by the Environment think tank Germanwatch), Myanmar ranks among the top 3 of most affected countries by weather-related events. In recent years, the climate change has been characterized by changing rainfall patterns, increasing temperatures and extreme weather throughout the country and some examples are presented below according to the UN Food and Agriculture Organization:

- Drought commonly occurs in the dry zones Sagaing, Mandalay and Magway Regions.
- Cyclones, storm surges, heavy winds, floods were usually observed in the coastal areas, mainly the Rakhine Coastal State, Ayeyarwaddy Delta and Mon State.
- High temperatures occur in flat regions in the Central Dry Zone.
- Intensive rains occur in Tanintharyi, Yangon, Rakhine, Ayeyarwady and Mon State/Region and other parts of the country.
- Sea level rise was observed in coastal regions/ Ayeyarwady Delta.

The impact on the productivity of the agricultural sector is high due to the combination of poor agricultural techniques, the sudden destruction of cultivations by severe hazards, droughts and erosion of soils in the long run.

5. RECENT GOVERNMENT POLICY REFORMS RELATED TO AGRICULTURE & ECONOMY

- In February 2018, the Ministry of Planning and Finance released a draft version of the **Myanmar Sustainable Development Plan (MSDP)** with five main goals, including economic stability and private-sector growth. The MSDP is to be aligned with the 12-point Economic Policy of the Union of Myanmar, with the objective of building up the economic community of the Association of Southeast Asian Nations (ASEAN), and meeting the United Nations Sustainable Development Goals.
- Since August 2018 there is a **new Myanmar Companies Law** that requires companies to re-register under the law, allowing foreigners to own up to 35% of local companies.
- On 7 June 2018 the Ministry of Agriculture, Livestock and Irrigation launched the **Agriculture Development Strategy and Investment Plan**. It contains three pillars: governance (including planning, policy, monitoring and evaluation, and other outcome areas), productivity (including research, extension, irrigation, mechanization and other outcome areas) and market linkages and competitiveness (including business environment, intellectual property rights, food quality, safety and other outcome areas).

- The Ministry of Agriculture, Livestock and Irrigation recently also developed "The Road Map for Myanmar's Seed Sector: 2017-2020" which reveal different statistics fundamental to the growth strategy of the sector.
- Recently, Myanmar government passed a new regulation, allowing 100% foreign ownership of seeds businesses (earlier the limit was 40%).
- Moreover, a series of regional and national consultations were conducted with technical support from the International Finance Corporation (IFC), a member of World Bank Group.

6. SECTORAL OPPORTUNITIES & CHALLENGES FOR FLEMISCH COMPANIES

A Flemish company should be aware of the sector's context including strengths, weaknesses, opportunities and challenges when considering business partnerships with local companies, be it in investment or trade.

6.1 STRENGTHS

- Myanmar has ample land, water (but underdeveloped irrigable area) and population that is experienced in agriculture and agricultural practices.
- It has a growing domestic market and a strategic location for international exports such as China, India, Japan, Europe and ASEAN.
- The regional integration and connectivity - particularly with GMS/Greater Mekong Subregion and ASEAN - have improved.
- Recently the government also took some policy reforms in order to boost Myanmar's agricultural sector and to promote local/foreign partnership.

6.2 WEAKNESSES

- Myanmar's farmers have limited access to timely and quality inputs, including seeds, fertilizers, pesticides, post-harvest infrastructure and services and financial services.
- Moreover, local companies do not have full awareness on research and development for innovative farming methods and for predicting weather patterns.
- Besides, the agroindustry has low value-added production to reach its full potential in terms of international standards.
- There is also low capacity of government institutions to carry out key governance functions such as planning, policy formulation and analysis, monitoring and evaluation, safeguards.

6.3 CHALLENGES

- Agriculture in Myanmar is still a very labor-intensive industry because most of the activities are carried out manually with low levels of mechanization.
- This directly links to the low productivity and low agricultural output.
- Investment in this sector remains minimal so the industry lacks modern practices, quality seeds, irrigation, research & development to innovate farming methods, mechanizing processing facilities to enhance productivity, quality control measures, modern warehousing, distribution, logistics & transport facilities, packaging and branding.

6.4 OPPORTUNITIES

Despite these challenges, the agricultural sector has the potential to see rapid growth with the introduction of better access to capital for farmers, greater availability of better seeds, more modern logistics and an increased use of technology. The government itself is initiating projects in order to improve this sector with the goal of increasing exports such as USAID Food Security Policy Project, a five-year investment co-financed by the U.S Agency for International Development (USAID) and Food Security Fund (LIFT), Country Partnership Strategy with Asian Development Bank (ADB) (2017 – 2021) focusing on three sectors inclusive of agriculture and irrigation, rural infrastructure development and private sector initiatives. Moreover, Ooredoo Myanmar and the United Nations Development Programme (UNDP) signed MOU to strengthen the implementation of Sustainable Enterprieses and Agricultural Devleopment (SEAD) project for 2 years to develop Myanmar's Dry Zone in promoting climate resilient farming practices.

The weaknesses and challenges faced by local companies in the sector provide opportunities for foreign companies to do business and enhance capacity. Foreign companies should focus on the following main areas:

- Supply of products and technology (seeds, fertilizers, agrochemical products, agricultural machinery, irrigation systems, pre and post-harvest technology);
- Production and processing industries (crop production, value-added processing, refinery, canning and research & development);
- Wholesales market industries (agricultural cooperatives);
- Service industries (credit and insurance services, quality food safety institution, consumer bodies, service support for supply chain);
- Aquaculture.

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8. ADDENDUM

8.1 INDUSTRY CONTACT INFORMATION

Ministry	Contact Person	Department	Contact
Ministry of Agriculture, Livestock and Irrigation (MOALI)	U Kyaw Min Oo Director General	Department of Agriculture and Irrigation Office No.15, Nay Pyi Taw, Myanmar	Please contact FIT Yangon
	Dr. Nang Hseng Hom Rector	Yezin Agriculture University Yezin, Zeyar Thiri Township, Nay Pyi Taw 15013, Myanmar	Please contact FIT Yangon
Ministry of Commerce (MOC)	U Aung Soe Director General	Department of Trade Office No.3, Nay Pyi Taw, Myanmar No. 228-240, Strand Road, Kyauktada Township, Yangon, Myanmar	Please contact FIT Yangon
Ministry of Investment and Foreign Economic Relation (MIFER)	U Aung Naing Oo Director General/Permanent Secretary	Ministry of Investment and Foreign Economic Relation Building No.1, Naypyitaw, Myanmar	Please contact FIT Yangon
Ministry of Planning and Finance (MOF)	U Thant Zin Lwin Director General	Directorate of Investment and Company Administration No.1, Thitsar Road, Yankin Township, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Investment Commission (MIC)	H.E U Thaung Tun Chairman	Myanmar Investment Commission (MIC) No.1, Thitsar Road, Yankin Township, Yangon, Myanmar	Please contact FIT Yangon

8.2 RELATED ASSOCIATIONS IN MYANMAR

Association	Address	Contact
Myanmar Rice Millers Association	29, Min Ye Kyaw Swar Road, Ward (8), Lanmadaw Township, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Edible Oil Dealers Association	Building 42, Ground Floor, 2nd Street, Lanmadaw Township, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Forest Products and Timber Merchants Association	29 Min Ye Kyaw Swa Street, Lanmadaw Township, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Paddy Producers Association	29 Min Ye Kyaw Swa Street, Lanmadaw Township, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Fruit, Flower and Vegetable Producer and Export Association	5th Floor, Min Ye Kyaw Swar Street, Lanmadaw Township, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Agro-based Food Processors and Exporters Association	5th Floor, 29, Minyekyawswar Road, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Rubber Planters and Producers Association	127,40th St.,Ward (9),Kyauktada Township, Between Maha Bandoola Road and Merchant Road, Yangon	Please contact FIT Yangon
Myanmar Perennial Crop Producers Association	Shwe Pazun Bakery, Bogyoke Road, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Rice Federation	No. 29, UMFCCI Tower, Level 9, Minyekyawswar Road, Lanmadaw Township, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Fertilizer Seed And Pesticides Entrepreneurs Association	95/A, 2nd Floor, Kyaik Waing Pagoda Road, 8 Miles Business Centre, Hlaing Township, Yangon, Myanmar	Please contact FIT Yangon
Myanmar Oil Palm Producers Association	64 Waizayantar St, Ward (8), South Okkalapa Township,Yangon, Myanmar	Please contact FIT Yangon

8.3 RELATED EVENTS IN MYANMAR

Event	Frequency	Profile	Contact
AgriLivestock Myanmar	Annual	It is a premier international B2B platform for showcasing a variety of the latest products and solutions for the improvement of the local livestock sector. It is also a great opportunity for overseas companies to meet, network and form mutually beneficial relationships with local industry professionals and key decision-makers.	Please contact FIT Yangon
Agri Myanmar	Annual	Agri Myanmar is the leading agricultural event in Myanmar offering opportunities for business cooperation, networking, potential market entry, as well as for exchanging useful information and innovative ideas. The attendees will learn more about new businesses, source the latest products and technologies, meet influencers and key industry leaders and can participate in the professional Seminar Program which is focusing on the latest trends and developments shaping global and regional markets etc. This event provides many types of opportunities such as meeting directly with distributors and buyers as well as with farmers and agronomists.	Please contact FIT Yangon
International exhibition and conference on Agriculture Equipment and Machinery for Myanmar	Annual	This exhibition features Agricultural Machinery, Farm Machinery & Equipment for Soil working, Seeding and Fertilization, Drilling and Sowing, Plant Protection, Irrigation and Drainage, Harvest Conditioning, Conveying, Preservation & Storage, Fruit, Vegetables and other special crops.	Please contact FIT Yangon
Myanmar Agrotek Foodtek	Annual	The event brings the industry together in the field of machinery, equipment, supplies, services and other vendors with innovative products.	Please contact FIT Yangon
Myanmar International Agriculture Techniques & Equipment Exhibition	Annual	This trade show displays Agricultural Equipment & Machinery, Agro & Food Processing, Aquaculture, Biotechnology, Fertilizers & Chemicals, Floriculture, Fork Lift & Handling Equipment, Greenhouses, Horticulture, Irrigation and Water Technologies, Livestock & Dairy Farming, Marketing & Export Services, Organic Agriculture, Plant Protection, Plasticulture, Post-Harvest Treatment, Poultry, and more.	Please contact FIT Yangon