Food Value Chain in Myanmar and its Improvement through Japanese Factory Visit Tours

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Outline

- Introduction
- Rice Value Chain
- Pluses Value Chain
- Fruits and Vegetables Value Chain
- Analysis of Food processing industries in Myanmar
- Lessons learned from Japanese Factory Visit Tours
- Ways to improve
- Conclusion
Introduction

Myanmar

- geographically located b/t 9° 58' to 28° 31' N latitude & 92° 9' to 101° 10' E longitude - situated in South East Asia
- total area - about 676,756 sq km
- agricultural country
- economy - based on agriculture
- vast areas of fertile land & abundant of water
- geographical features, **various crop varieties** - grown
# Major Crops Sown in Myanmar

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cereals</td>
<td>Paddy (rice), wheat, maize, sorghum</td>
</tr>
<tr>
<td>Oilseeds</td>
<td>Groundnut, sesame, sunflower, niger, mustard</td>
</tr>
<tr>
<td>Pluses</td>
<td>17 kinds of pulses including black gram, green gram, pigeon pea, spy bean, cow-pea, kidney bean, butter bean, chick pea, garden pea</td>
</tr>
<tr>
<td>Industrial Crops</td>
<td>Cotton, sugarcane, jute, rubber, coffee, mulberry, oil-palm</td>
</tr>
<tr>
<td>Kitchen Crops</td>
<td>Chilly, onion, garlic, ginger, turmeric, potato</td>
</tr>
<tr>
<td>Fruits &amp; Vegetables</td>
<td>Mango, banana, citrus, pears, durian, mangosteen, pineapple, rambutan and others tropical and temperate vegetables</td>
</tr>
</tbody>
</table>
# Rice Sown area, Harvest & Production

<table>
<thead>
<tr>
<th>Year</th>
<th>Sown (acre)</th>
<th>Harvested (acre)</th>
<th>Production (ton)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995-1996</td>
<td>15166</td>
<td>14907</td>
<td>17669.6</td>
</tr>
<tr>
<td>2000-2001</td>
<td>15713</td>
<td>15573</td>
<td>20986.9</td>
</tr>
<tr>
<td>2005-2006</td>
<td>18259</td>
<td>18246</td>
<td>27245.8</td>
</tr>
<tr>
<td>2010-2011</td>
<td>19885</td>
<td>19796</td>
<td>32065.1</td>
</tr>
<tr>
<td>2011-2012</td>
<td>18762</td>
<td>18698</td>
<td>28552.1</td>
</tr>
<tr>
<td>2012-2013</td>
<td>17893</td>
<td>17270</td>
<td>26216.6</td>
</tr>
<tr>
<td>2013-2014</td>
<td>17999</td>
<td>17181</td>
<td>26372.1</td>
</tr>
<tr>
<td>2014-2015</td>
<td>17722</td>
<td>16975</td>
<td>26423.3</td>
</tr>
</tbody>
</table>

Source: CSO Myanmar statistical Year Book, 2015
Rice Value Chain

Inputs → Farmers → Millers → Wholesalers → Retailers → Exporter → Consumer
Weak Links in Rice Value Chain

- Purity & quality of seed
- Quality & appropriateness of fertilizer, pesticide
- Rural financing

- Cultural practice lead to sun-cracking & high broken
- Lack of proper drying & storage facilities
- Lack of development of other end-used of rice and rice by-product

- Export-consistency of quality and supply
- Buffer stocking / stockpiling rationale
- Parallel market-illegal broader trade
Value added Product of Rice

Myanmar people - long tradition of preparing food in their own way

Rice vermicelli

Dried rice flakes
Mohinga or rice noodle served with fish soup - the favorite Myanmar dish
Traditional Snacks

Sa Nwin Ma Kin
- sweets made from rice

Mont Sein Poung
- steamed rice cake

Bein Mont
- rice pancake
### Pulses Sown Area, Yield and Production

<table>
<thead>
<tr>
<th>Year</th>
<th>Sown (‘000 Ha)</th>
<th>Harvested (‘000 Ha)</th>
<th>Yield (MT/Ha)</th>
<th>Production (‘000 MT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995/96</td>
<td>2046</td>
<td>2006</td>
<td>0.69</td>
<td>1375</td>
</tr>
<tr>
<td>2000/01</td>
<td>2934</td>
<td>2873</td>
<td>0.79</td>
<td>2263</td>
</tr>
<tr>
<td>2005/06</td>
<td>3808</td>
<td>3806</td>
<td>1.05</td>
<td>4008</td>
</tr>
<tr>
<td>2009/10</td>
<td>4383</td>
<td>4382</td>
<td>1.25</td>
<td>5486</td>
</tr>
<tr>
<td>2010/11</td>
<td>4501</td>
<td>4499</td>
<td>1.29</td>
<td>5792</td>
</tr>
<tr>
<td>2011/12</td>
<td>4417</td>
<td>4416</td>
<td>1.23</td>
<td>5410</td>
</tr>
<tr>
<td>2012/13</td>
<td>4449</td>
<td>4447</td>
<td>1.28</td>
<td>5701</td>
</tr>
<tr>
<td>2013/14</td>
<td>4534</td>
<td>4533</td>
<td>1.3</td>
<td>5902</td>
</tr>
</tbody>
</table>

Source: Myanmar Agriculture at a Galance, DAP MOAI, 2015
## Pulses export

<table>
<thead>
<tr>
<th>Particulars</th>
<th>2005/06</th>
<th>2010/11</th>
<th>2012/13</th>
<th>2013/14</th>
<th>2014/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black gram</td>
<td>379.6</td>
<td>456.5</td>
<td>657.8</td>
<td>644.2</td>
<td>625.9</td>
</tr>
<tr>
<td>Green gram</td>
<td>174.1</td>
<td>166.3</td>
<td>360.1</td>
<td>339.9</td>
<td>378.1</td>
</tr>
<tr>
<td>Other pulses</td>
<td>323.8</td>
<td>206.6</td>
<td>465.8</td>
<td>316.8</td>
<td>455.3</td>
</tr>
</tbody>
</table>

Source: Myanmar Agriculture at a Glance, DAP MOAI, 2015
Pulses value chain in Myanmar
Current situation of Pulses

Problem

- Lack of value added processing capacity
- Lack of quality discovery / preservation in value chain
- Lack of quality price incentives for farmers
- High transportation cost in Myanmar
- Unavailability of good seeds and effective fertilizer

Requirement

- To produce more value-added pulses products and factories
- To improve network of roads
- To facilitate transportation
Value added products of Pulses

- Fried split chickpeas (pay kyaw)
- Fermented soybean cake
- Pae pyar
- Soy milk
Value added products of Pulses

Pickled tea leaf
- one of Myanmar traditional delicacy
- snack with maximum ingredients
- complimented with sesame, groundnut, fried beans, roasted sunflower seeds
Value Chain of Fruits and Vegetables
Value Chain of Fruits