



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

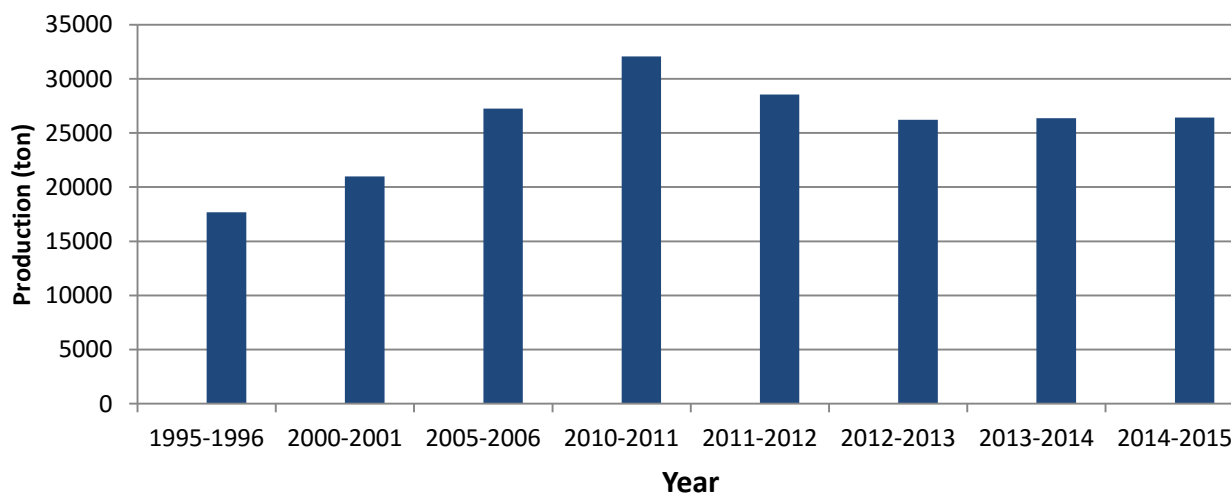
Major Crops Sown in Myanmar

Cereals	Paddy (rice), wheat, maize, sorghum
Oilseeds	Groundnut, sesame, sunflower, niger, mustard
Pluses	17 kinds of pulses including black gram, green gram, pigeon pea, spy bean, cow-pea, kidney bean, butter bean, chick pea, garden pea
Industrial Crops	Cotton, sugarcane, jute, rubber, coffee, mulberry, oil-palm
Kitchen Crops	Chilly, onion, garlic, ginger, turmeric, potato
Fruits & Vegetables	Mango, banana, citrus, pears, durian, mangosteen, pineapple, rambutan and others tropical and temperate vegetables

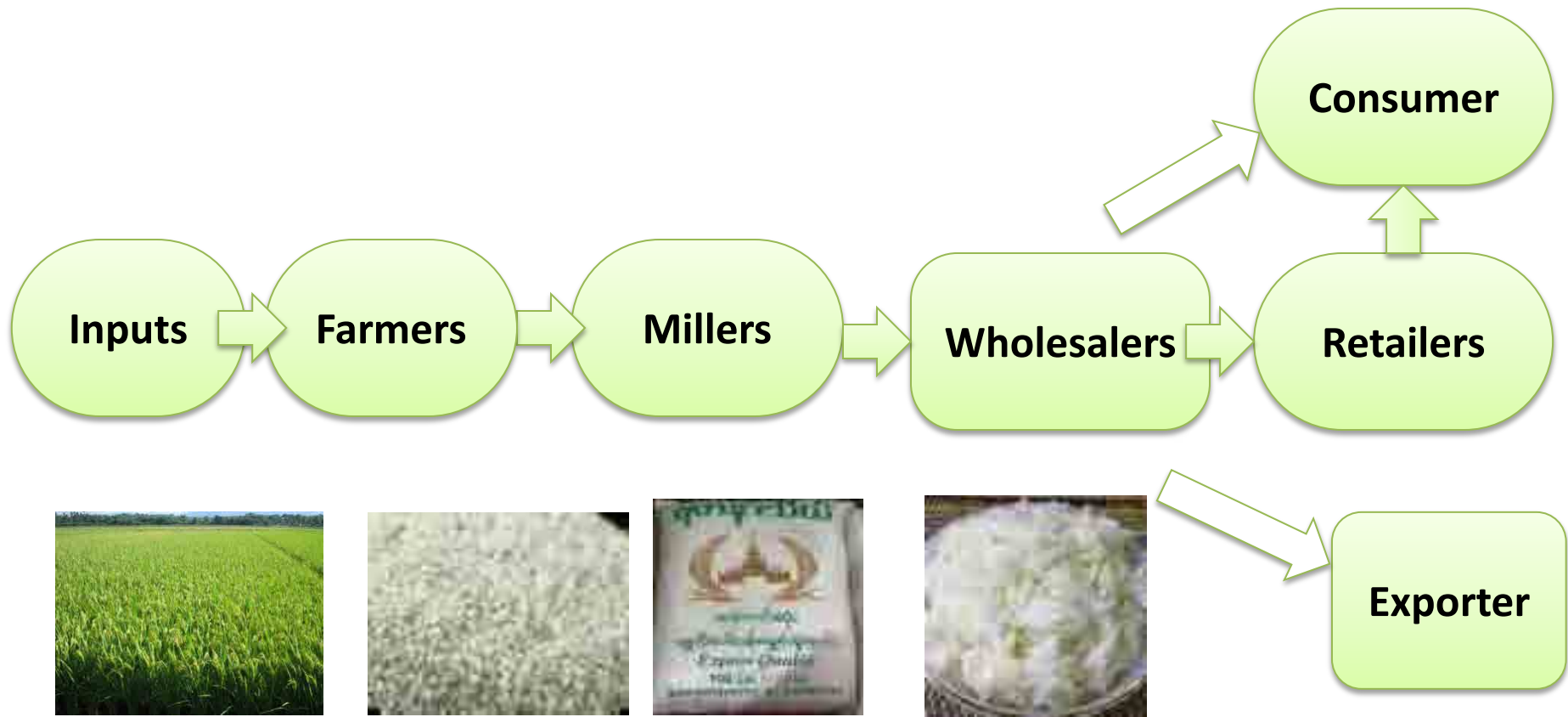
Rice Sown area, Harvest & Production

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

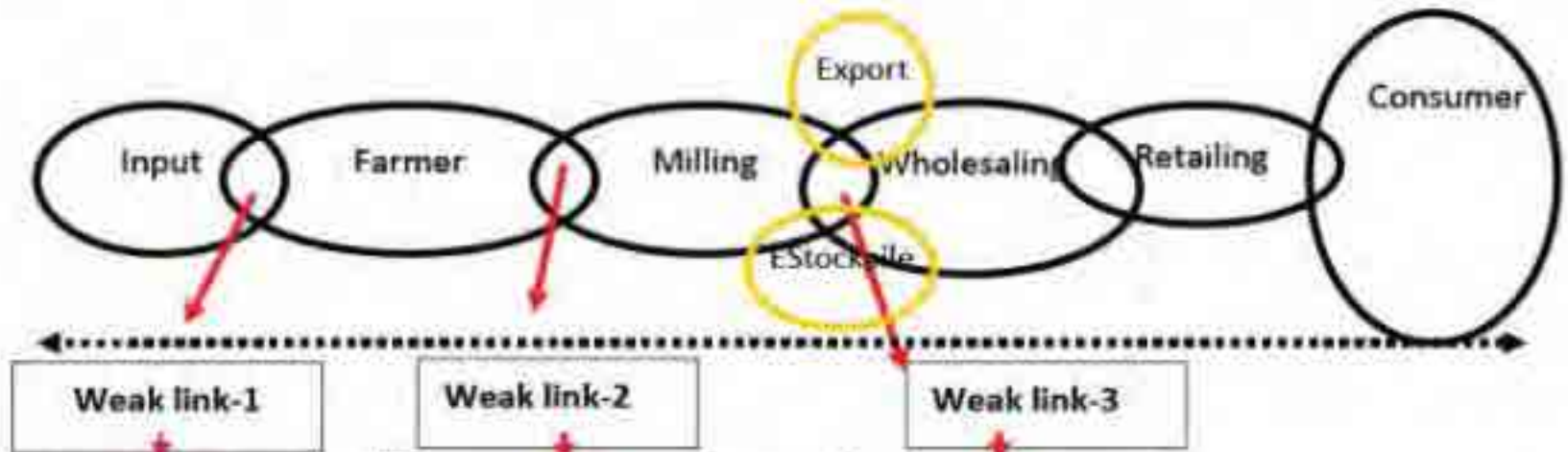
Source: CSO Myanmar statistical Year Book , 2015



Rice Value Chain



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 broder 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 Poug

- steamed rice cake



Bein Mont

-rice pancake

Pulses Sown Area, Yield and Production

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

Source : Myanmar Agriculture at a Glance, DAP MOAI, 2015

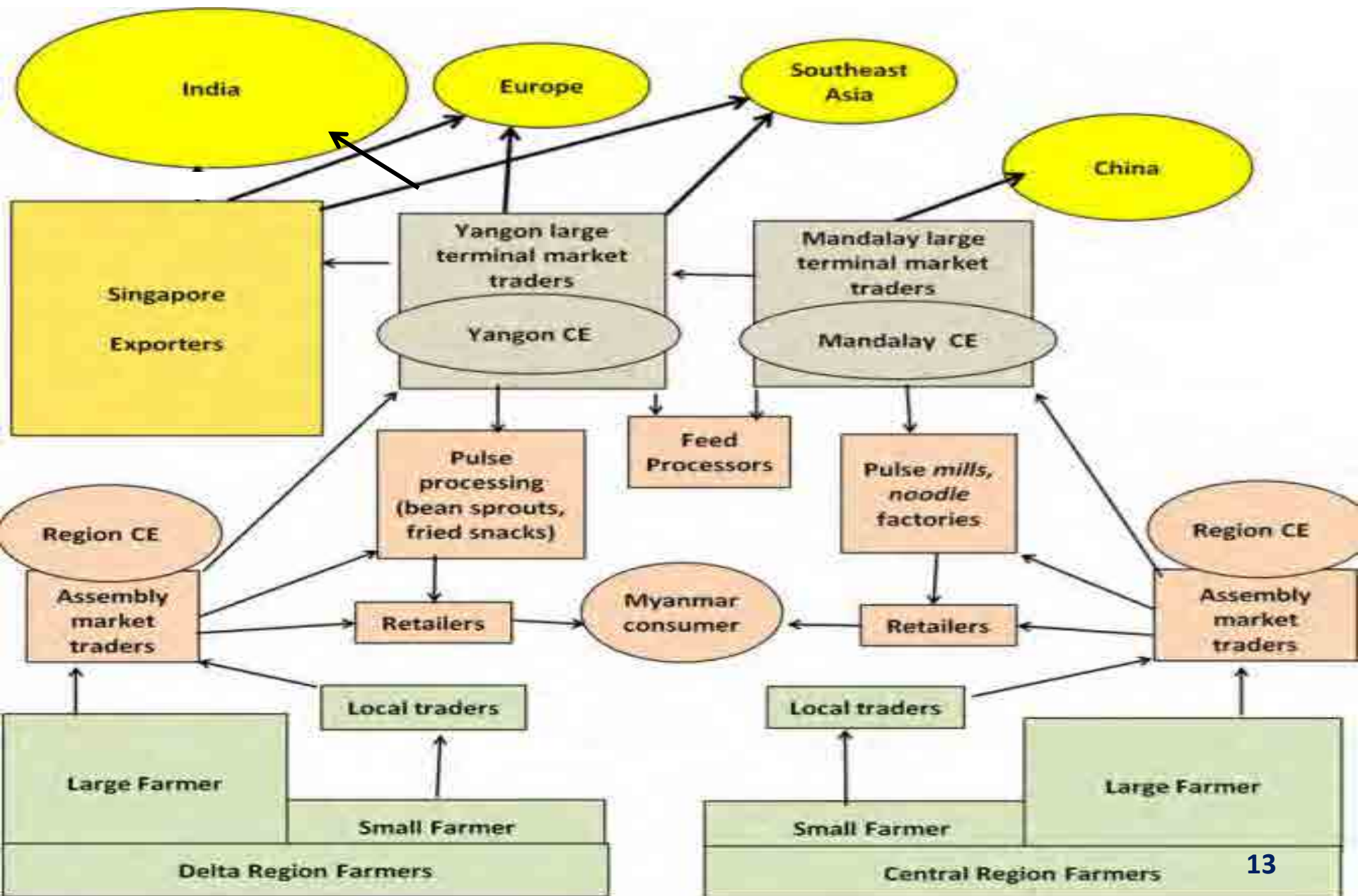
Pulses export

(000' MT)

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






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



Chickpea noodle



Bean sprouts



Fried black gram snacks



Chickpea snacks

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



Lab Lab Bean



Value Chain of Fruits and Vegetables



Pyin Oo Lwin



Shan State



Central Regions



Yangon Region



Mon State



Value Chain of Fruits

