Crop Summary in Myanmar

By Issares Thumrongthunyawong

Agenda : Myanmar Crop Summary

1. General Information
2. Rice
3. Pulses and Beans
4. Sugarcane

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General Information

- **Location:** 9° 32' to 28 ° 31' N and 92 ° 10' to 101 ° 11' E
- **Area:** 676578 sq. km (Approximately twice the size of Vietnam)
- **Land:** 676,577 sq.km.
- **Population:** 59.78 million (2010)
- **Labor Force:** 32.53 million (2011)
- **Labor by Sector:** Agriculture: 70%
  Industry: 7%
  Service: 23%
- **Border Area:** China (2227 km)
  India(1453 km)
  Bangladesh(272 km)
  Lao PDR(235 km)
  Thailand(2099 km)
- **Costal Area:** 2,229 km
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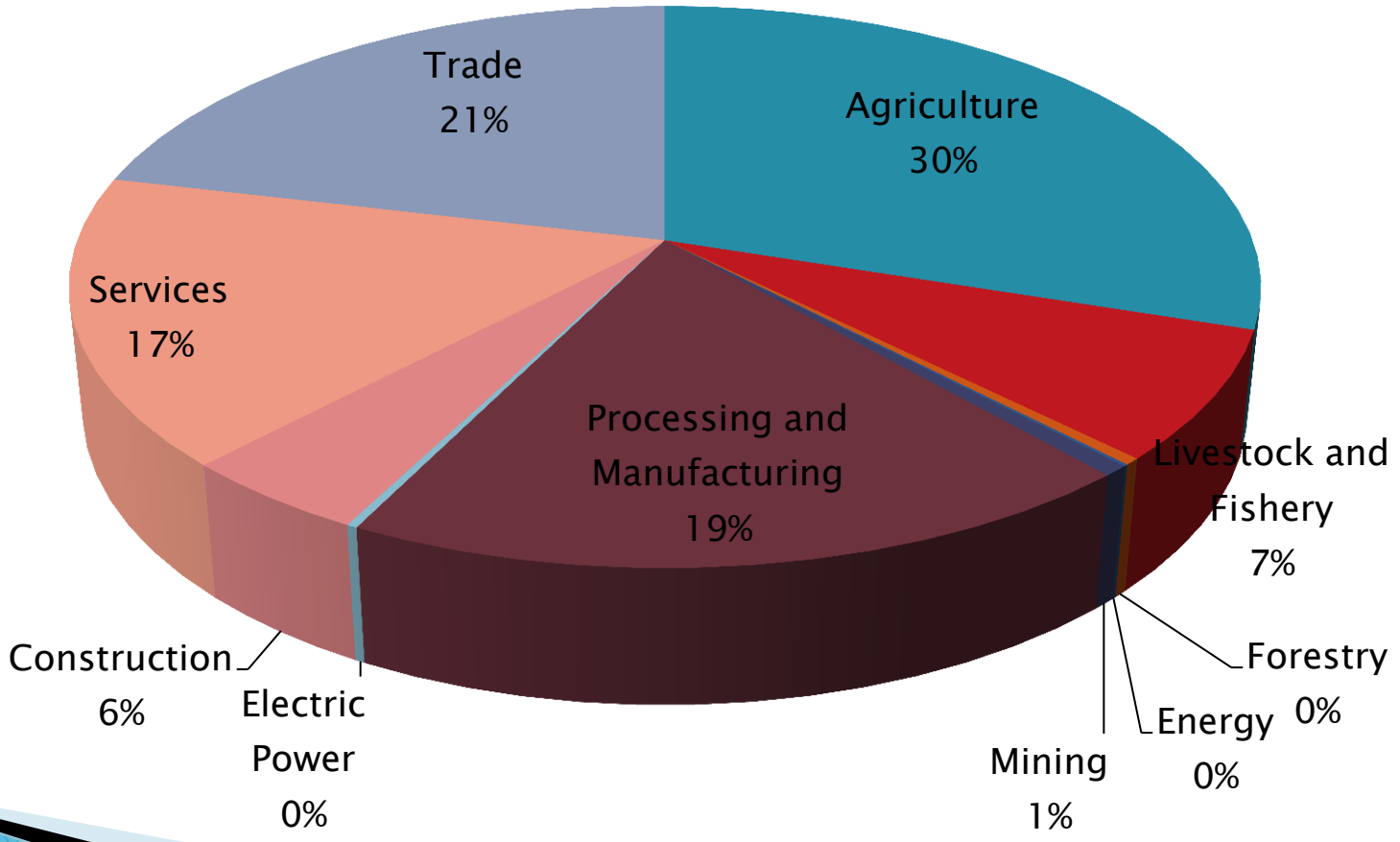
General Information

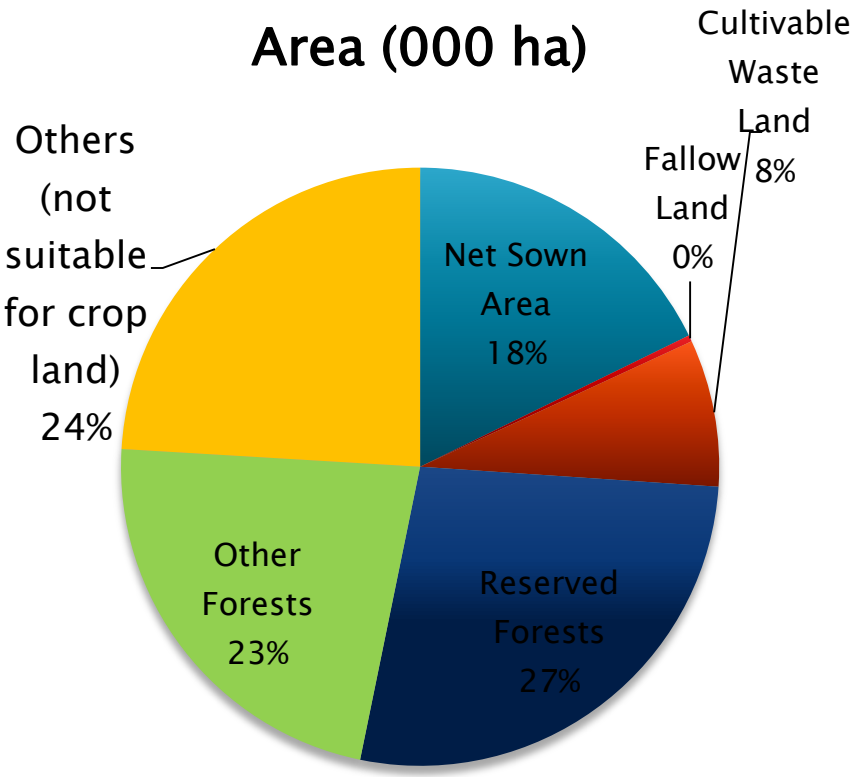
GDP by Sector



General Information

Land Used in Myanmar

Type of Land	Area	Percentage
Net Sown Area	12,023	18%
Fallow Land	231	0%
Cultivable Waste Land	5,382	8%
Reserved Forests	18,369	27%
Other Forests	15,378	23%
Others (not suitable for crop land)	16,276	24%
Total	**67,659**	**100%**



General Information

Major Crops in Myanmar

Crop	Net Sown (Million ha)
Rice	7.50
Pulses and Beans	4.37
Rubber	0.53
Sugarcane	0.18
Oil Palm	0.13

General Information

Major Crops in Myanmar

Sugarcane

Rice / Bean

Rubber

Oil Palm

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Rice

Rice Production

- Total Sown Acres: 7.50 million ha
- Total Harvested Acres: 7.04 million ha
- Average Yield: 1.92 MT/ha (73 baskets/acre)
- Domestic Consumption: 12.5 million MT
- Exportable Surplus: 1-1.5 million MT

Rice

4 Major Rice Plantations

Sagaing Division

Rakhine State

Bago Division

Ayeyarwaddy Division

❖ 4 Major Rivers and many rivers and creeks flow into or join the major rivers from left and right sides

Rice

Government Policy

National Target

❖2011-2012 to 2015-2016 Five Year Development Plan, Agriculture Sector Average Annual Growth Rate – 2%

❖ Domestic Rice Sufficiency level – at least 166%

❖ National Average Per Hectare Yield – (80 basket) – 5 MT

❖ Irrigated Rice Cultivation Acres – 2.32 million ha

❖ Effective & Efficient Utilization of Chemical and Natural Fertilizer

❖ Export of Rice 1 to 1.5 million MT in 2012-2013 and to prepare for 3 million MT export in 2013-2014

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4. Sugarcane

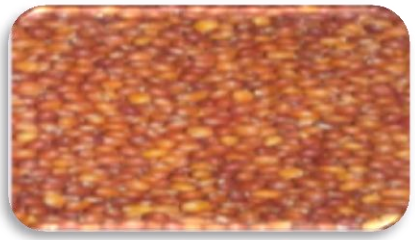
Pulses and Bean

Local Name: Matpe
English Name: Black Gram

Local Name: Peagyi
English Name: Lablab bean

Local Name: Pedisein
English Name: Green Gram

Local Name: Cowpea
English Name: Black eyed bean



Local Name: Pesinngoun
English Name: Pigeon pea

Local Name: Htawbut pea
English Name: Butter bean

Local Name: Kalapea
English Name: Chickpea

Local Name: Peayin
English Name: Rice bean

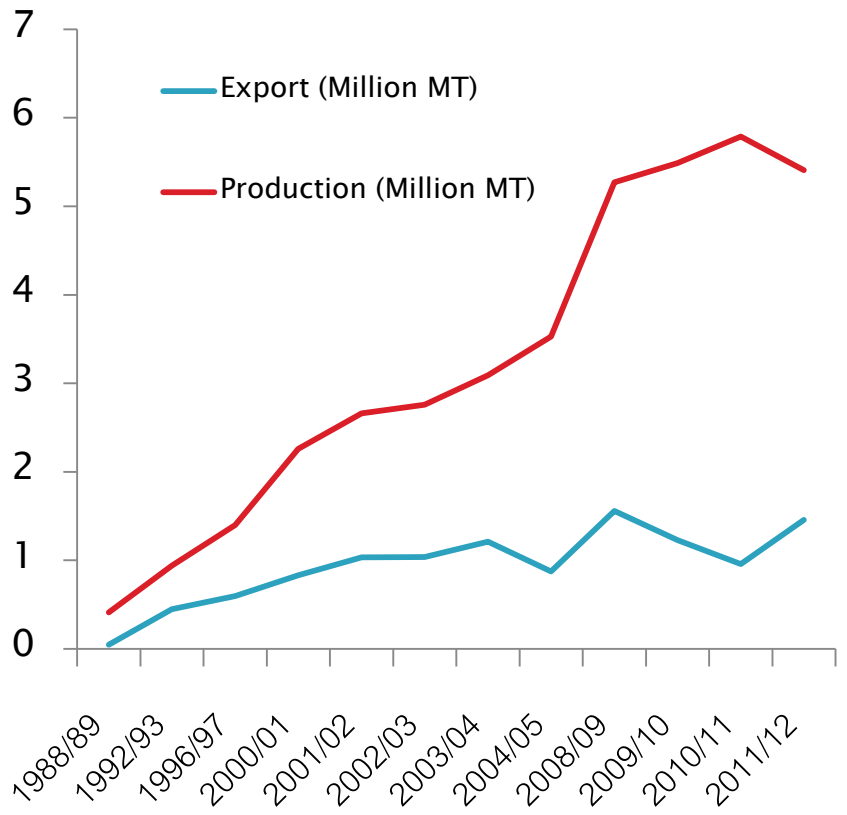
Local Name: Myaehtauk pea
English Name: Black Gram

Local Name: Penilay
English Name: Lentil

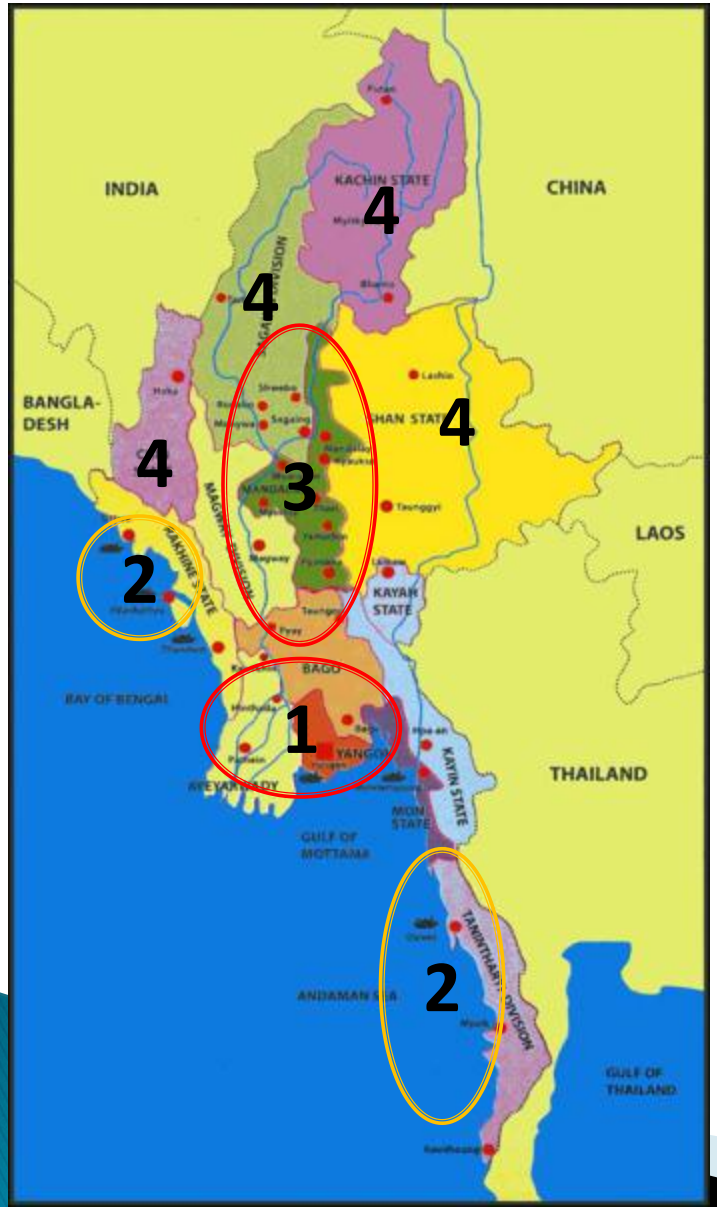
Pulses and Bean

Pulses, Beans and Sesame Production

Year	Sown Area (Million ha)	Production (Million MT)	Export (Million MT)
1988/89	0.72	0.41	0.047
1992/93	1.48	0.94	0.449
1996/97	1.96	1.40	0.595
2000/01	2.92	2.26	0.831
2001/02	3.16	2.66	1.035
2002/03	3.24	2.76	1.038
2003/04	3.36	3.09	1.211
2004/05	3.52	3.53	0.873
2008/09	4.24	5.27	1.558
2009/10	4.32	5.49	1.228
2010/11	4.448	5.79	0.956
2011/12	4.368	5.41	1.457



Pulses and Bean



Pulse Area Based on Region

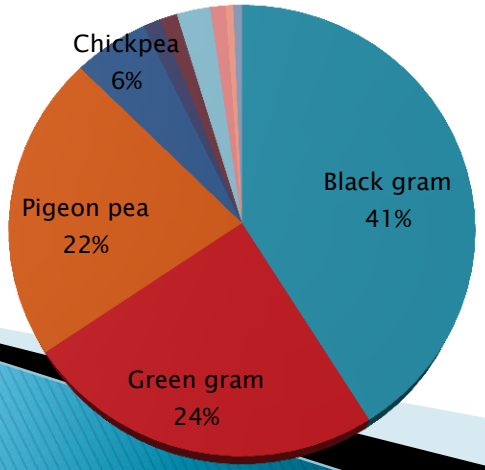
Zone	Region	Location	Monsoon Season (ha)	Cool Season (ha)	Total (ha)	Percentage (%)
1	Delta Region	Lower Myanmar	14,000	1,646,400	1,660,400	37%
2	Coastal Region	Lower Myanmar	1,600	78,000	79,600	2%
3	Central Dry Zone Region	Upper Myanmar	1,392,800	1,020,800	2,413,600	54%
4	Hilly Region	Upper Myanmar	163,600	131,600	295,200	7%
Grand Total			**1,572,000**	**2,876,800**	**4,448,800**	**100%**
(%) on Total			**35%**	**65%**	**100%**	

Pulses and Bean

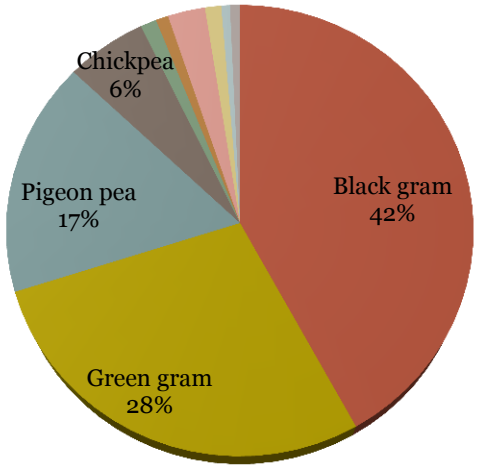
Pulse Export

Pulses	Export Quantity (Million MT)					Avg Price (USD/MT)		Value (Million USD)	
	2007/08	2008/09	2009/10	2010/11	2011/12	2010/11	2011/12	2010/11	2011/12
Black gram	508	535	619	464	599	988	787	458	472
Green gram	328	320	326	268	355	1,119	890	300	316
Pigeon pea	270	475	194	146	320	833	596	122	190
Chickpea	115	88	46	8	79	763	828	6	65
Kidney bean	18	21	15	11	18	650	698	7	13
Rice bean	18	18	15	10	18	621	570	6	10
Cowpea	50	61	41	24	35	857	856	24	30
Butter bean	17	18	14	11	16	667	815	7	13
Lablab bean	6	5	8	4	8	1,064	978	4	7
Others	18	17	10	10	9	606	883	3	8
Total	1,348	1,558	1,288	956	1,457	982	772	938	1,125

Shared by Volume 2011-2012



Shared by Value 2011-2012

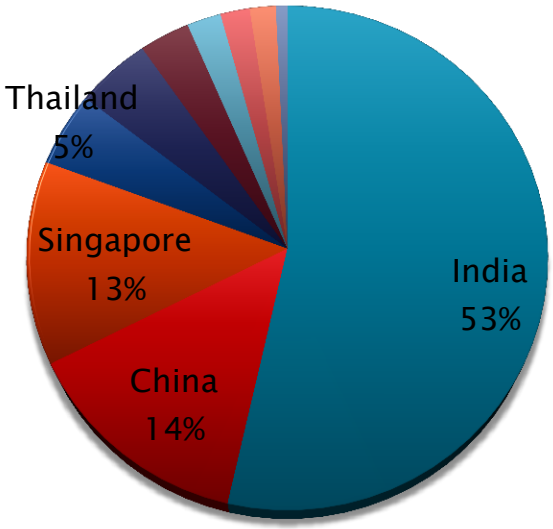


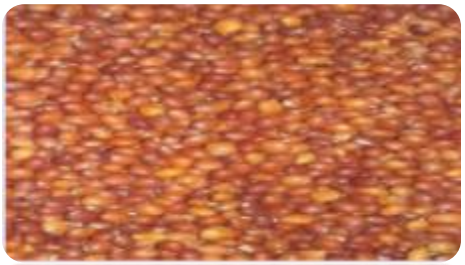
Pulses and Bean

Pulse Export

No	Importing countries of Myanmar pulses	Export volume (000 MT)	Export value (Million USD)	% On total export volume
1	India	512	479	54%
2	China	134	146	14%
3	Singapore	125	126	13%
4	Thailand	46	49	5%
5	Others	46	47	5%
6	Indonesia	31	31	3%
7	Malaysia	21	21	2%
8	Philippine	18	18	2%
9	Japan	16	14	2%
10	Pakistan	7	6	1%
11	Bangladesh	0	0	0%
12	Others	46	47	54%
Total		**1,002**	**986**	**100%**

Export Volume





Pulses and Bean

Pulses Situation

Price

• Due to India is the major import, the prices of beans in Myanmar will base on the prices of beans in Mumbai, India.

Problem

• High transportation cost in Myanmar
• Unavailability of good seeds and effective fertilizer

Opportunity

• Lifting up sanction of EU enhance opportunity to sell pulses to EU market.

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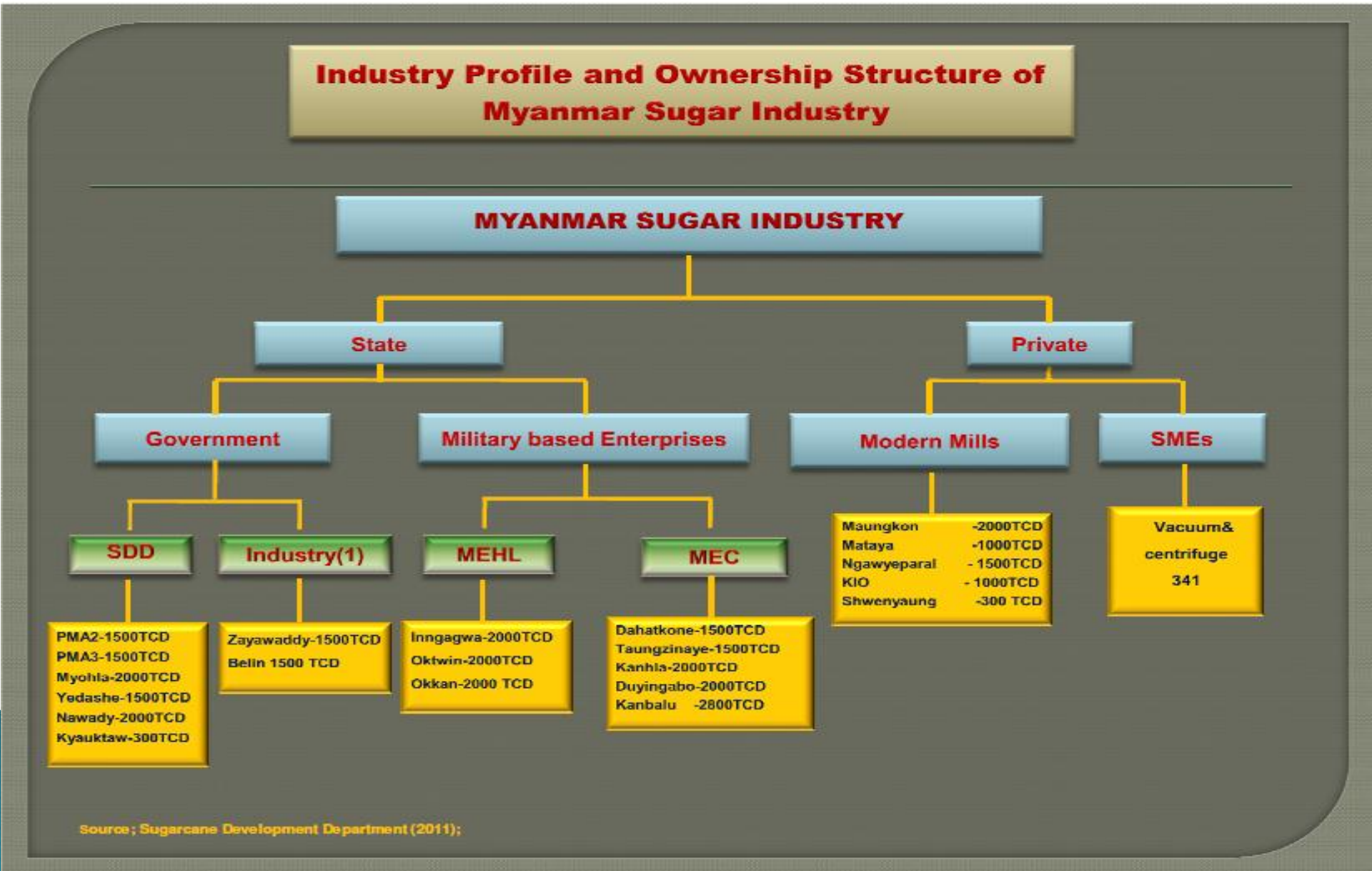
Sugarcane

Sugarcane Production

- Total Sown Acres: 0.18 million ha
- Average Yield: 6.58 MT/ha

Year	Product (MT)	Import (MT)	Export (MT)
2001	200,022		33,213
2002	258,484		11,822
2003	216,051	1,217	3,251
2004	206,480	7,736	1,436
2005	212,279	6,320	
2006	225,764	7,020	
2007	252,561	16,009	
2008	276,796	4,084	
2009	279,321		
2010	166,933		
2011	219,271		

Sugarcane


Industry Profile and Ownership Structure of Myanmar Sugar Industry
MYANMAR SUGAR INDUSTRY
State
Private
Government
Military based Enterprises
Modern Mills
SMEs
SDD
Industry(1)
MEHL
MEC
PMA2-1500TCD
PMA3-1500TCD
Myohla-2000TCD
Yedashe-1500TCD
Nawady-2000TCD
Kyauktaw-300TCD
Zayawaddy-1500TCD
Belin 1500 TCD
Inngagwa-2000TCD
Oktwin-2000TCD
Okkan-2000 TCD
Dahatkone-1500TCD
Taungzinaye-1500TCD
Kanhla-2000TCD
Duyingabo-2000TCD
Kanbalu -2800TCD
Maungkon -2000TCD
Mataya -1000TCD
Ngawyeparal - 1500TCD
KIO - 1000TCD
Shwenyaung -300 TCD
Vacuum& centrifuge 341
Source; Sugarcane Development Department (2011);

Sugarcane

Location and Capacity

State	Factory Name	Install Capacity (TCD)	Sugar Output (MT)	Potential Bioethanol Output (MT)	
				Bagasses	Molasses
Sagaing Division	Kantbalu	2,000	4,000	80,000	12,800
	Htigant, Great Wall	2,000	20,000	80,000	10,000
	Htigant,	500	800		
Mandalay Division	Pyinmana (I) *	1,500	2,000	60,000	9,600
	Pyinmana (II)	1,500	4,000	60,000	9,600
	Tatkone, Dahutkone	1,500	3,700	60,000	9,600
	Lewe,Taungzinaye	1,500	5,000	60,000	9,600
	Madaya	1,000	6,000	50,000	
	Tagaung, Ngwe La Min	300	700		
Bago Division	Myohla	2,000	6,000	80,000	12,800
	Yesdashe	1,500	10,000	60,000	9,600
	Oaktwin	2,000	7,000	80,000	12,800
	Zeyawaddy*	1,500	500	60,000	9,600
	Pyi, Nawaday	2,000	15,000	80,000	12,800
	Paukkaung,Inngagwa	2,000	8,000	80,000	12,800
Yangon Division	Okkan	2,000	4,000	80,000	12,800
Magwe Division	Taungtwingyi, Kanhla	2,000	3,000	80,000	12,800
	Aunglan, Duyingabo	2,000	1,000	80,000	12,800
Mon State	Belin*	1,500	600	60,000	9,600
Shan State	Shwenyaung	300	2,600	12,000	1,920
	Naungcho, Ngweyipale	1,500	12,550		
Rakhine State	Kyauktaw	300	500	12,000	1,920
Total		32,400	116,950	1,214,000	183,440

Sugarcane

Location and Capacity: Transfer of Ownership

No.	Stakeholders		Name of Sugar Factory	Stakeholders	No. of Sugar Mill
	1st Transfer			2nd Transfer	
	From	To		To	
1	MoAI	Ministry of Industry (1)	Bilin	Shwe Than Lwin	2
			Zeyawaddy	Kyaw Thar Co.	
	MoAI	Myanmar Economic Corporation (MEC)	Taungzin Aye		5
			Dahakone		
			Kanhla		
			Duyingabo		
	MoAI	Myanmar Economic Holding Ltd. (MEHL)	Inngwa		3
			Oaktwin		
			Okkan		
	Total				10

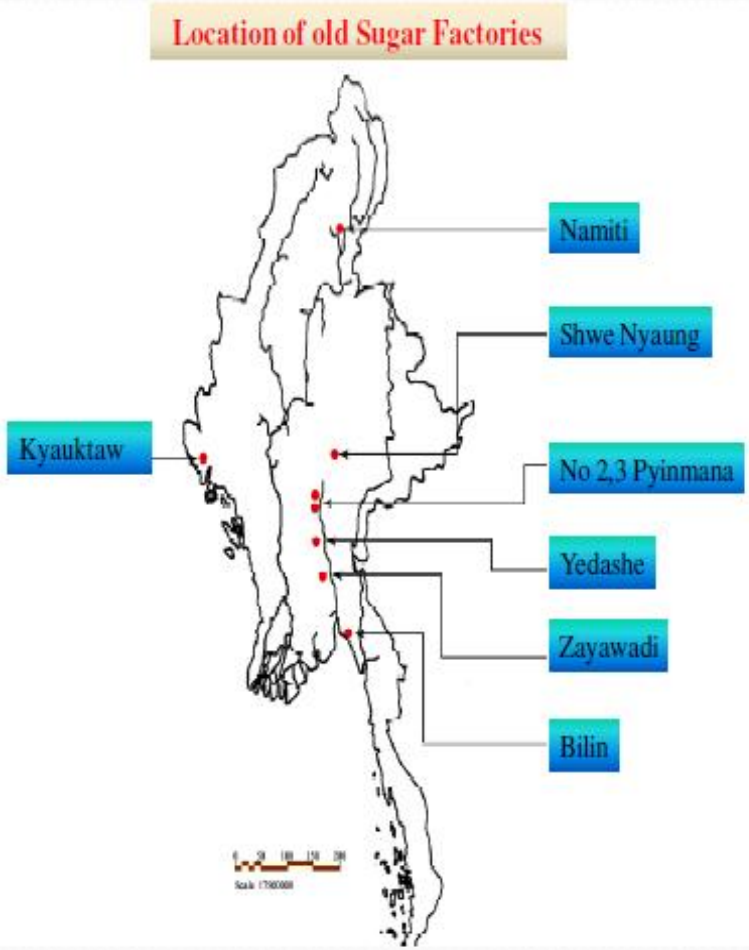
Sugarcane

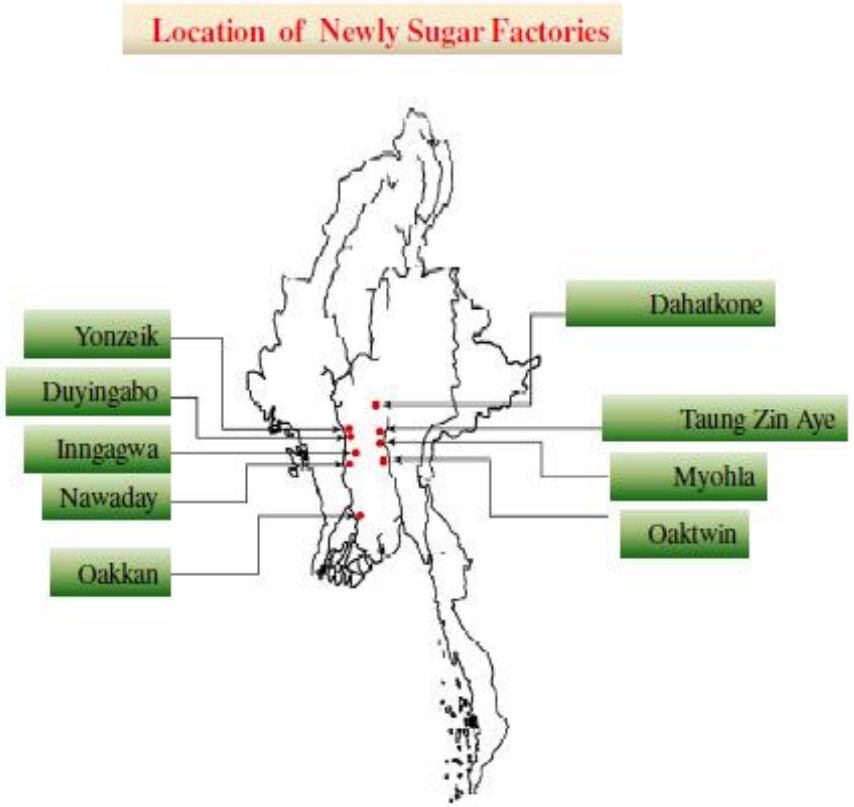
Location and Capacity: Transfer of Ownership (Cont.)

No.	Stakeholders		Name of Sugar Factory	Stakeholders	No. of Sugar Mill
	Sales				
	From	To			
2	MoAI	KIO	Nammati		1
	MoAI	More Sugar Mill	Shwe Nyaung		1
	Total				2
3	Lease (30 years)				
	From	To			
	MoAI	Yuzana Company (Pyinmana)	Pyinmana I,II		2
	MoAI	International Gateways	Myo Hla		1
	MoAI	Delicious Food	Yedashe		1
	MoAI	Taung Pyar Tan (Lease the share of MoAI)	Nawaday (JV)		1
	MoAI	Rakhine Multitrading	Kyauktaw		1
	Total				6
Grand Total (SEEs)					18

Sugarcane

Location and Capacity





Sugarcane

Sugarcane Situation

Land Used

❖ The areas that are suitable for growing sugarcane are Upper Mandalay Division, Upper Sagaing Division, Kayin State, Northern and Southern Shan State.

Problems for Sugar Industry

❖ The sugar Industry in Myanmar is still small. There are only two sugar factories with raw sugar and refinery process.

❖ All the rest could produce only white sugar.

❖ Industrial upgrading is needed to be competitive.

❖ The capacities of all sugar factories are below 2,000 TCD. Factories should be expanded to more than 10,000 TCD.

Thank You