



AGRICULTURE GUIDE 2018

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# EUROPEAN CHAMBER OF COMMERCE IN MYANMAR

EuroCham serves as the voice of European business in Myanmar. Its main mission is to significantly increase the presence of European companies in the country and to facilitate market access particularly for European SMEs – by advocating for member interests with the government and organisations in Myanmar, the ASEAN region and the EU.

With a strong, growing network of partners, EuroCham offers on-the-ground assistance for European businesses interested in commercial endeavours in Myanmar, whether in the form of advocacy, business services, research or networking.

This sector guide provides entry-level information for European companies planning to enter this fascinating frontier market. Please contact us for further information and support.

Yangon, December 2017





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# CONTENTS

1 Sector Overview	8
1.1 Current Market Situation	10
1.2 Location of Agriculture Production Sites	11
1.3 Types of Agriculture Products	12
1.4 Agriculture Sector Statistics	12
2 Investment Opportunities	16
2.1 Potential Upcoming Tenders	17
2.2 Potential Opportunities for Foreign Companies	18
2.3 Areas of Investment for Foreign Investors	19
3 General Legal / Investment Structure	20
3.1 General Investment Rules	22
3.2 Agriculture-Related Rules and Regulations	23
3.2.1 Investment Activities	23
3.2.2 Prohibited Activities	23
3.2.3 Restricted Activities	24
4 Outlook	25
5 Industry Contact Information	27
5.1 Government Offices	28
5.2 Business Associations	29
5.3 Other Relevant Institutions	30
Trusted Service Partners	32
Annex Table : Production of Major Crops in Tonnes	33

## **TABLES**

Table 1: Distribution of Major Farming Systems and Population in Myanmar	9
Table 2: Production of Crops in Tonnes	32
Table 3: Forecasted Donor Investment Amount	33

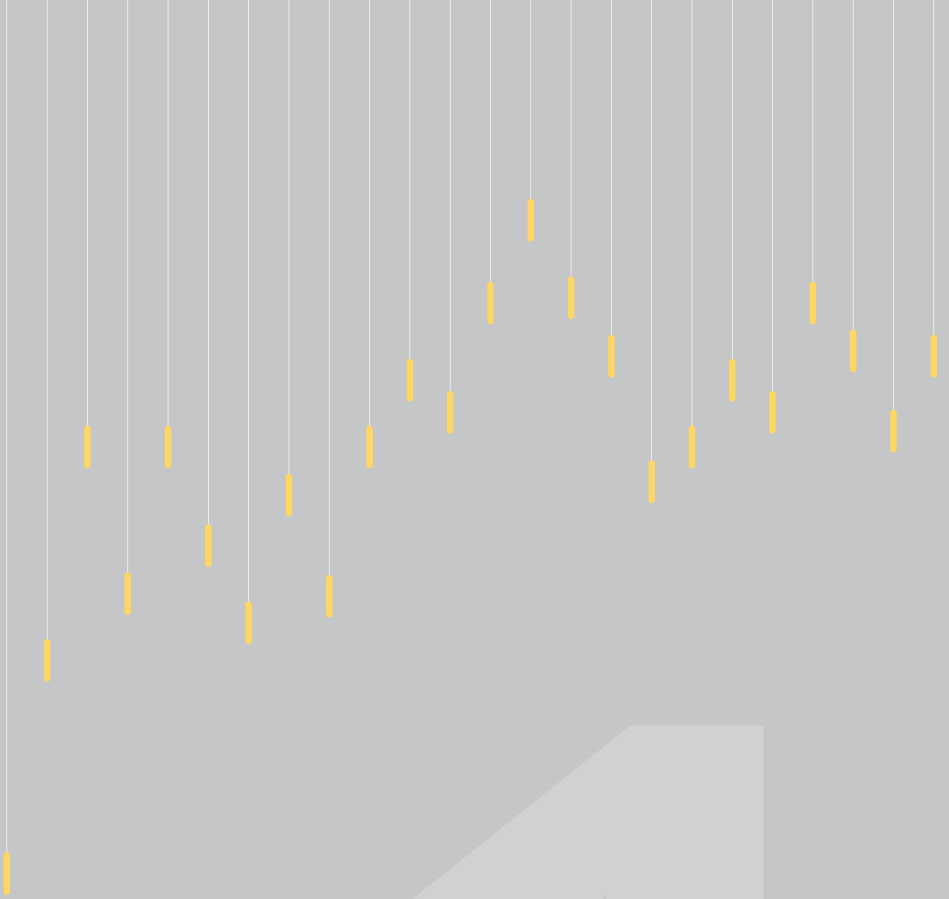
## **FIGURES**

Figure 1: Map of Myanmar	11
Figure 2: Export Volume of Selected Crops	13
Figure 3: Export Amount of Selected Crops	13
Figure 4: Rice Production per Region 2015–2016	14
Figure 5: Myanmar Milled Rice Production per Year	14

## ACRONYMS

<i>ADB</i>	<i>Asia Development Bank</i>
<i>ADS</i>	<i>Agriculture Development Sector</i>
<i>ASEAN</i>	<i>Association of Southeast Asian Nations</i>
<i>DICA</i>	<i>Directorate of Investment and Company Administration</i>
<i>EIA</i>	<i>Environmental Impact Assessment</i>
<i>FDI</i>	<i>Foreign Direct Investment</i>
<i>FIL</i>	<i>Foreign Investment Law</i>
<i>GAP</i>	<i>Good Agricultural Practices</i>
<i>MADB</i>	<i>Myanmar Agriculture Development Bank</i>
<i>MALI</i>	<i>Ministry of Agriculture, Livestock and Irrigation</i>
<i>MAPCO</i>	<i>Myanmar Agribusiness Public Corporation</i>
<i>MIC</i>	<i>Myanmar Investment Commission</i>
<i>MIL</i>	<i>Myanmar Investment Law</i>
<i>MFI</i>	<i>Microfinance Institution</i>
<i>UMFCCI</i>	<i>Union of Myanmar Federation of Chambers of Commerce and Industry</i>

# 1 SECTOR OVERVIEW





With a contribution of about 38% to Myanmar's GDP and 23% in exports, agriculture is the leading employer in the economy (60%). Out of 67.6 million hectares of land in Myanmar, 12.8 million hectares are cultivated land. When measured by value of production, rice is the dominant commodity, accounting for 43% of production value, which is almost five times as high as the second highest value commodity: poultry.

Although Myanmar's agriculture sector is still recovering from the effects of Cyclone Komen in the summer of 2015, the agriculture sector still accounts for 29% of value-added in Myanmar and is projected to grow at 4% from 2016–2017, compared to 3% in 2015–2016. Crop production accounts for 72% of agricultural output; Myanmar's three main groups include paddy, beans and pulses, and oilseed crops.

Myanmar's lands can be divided into three agro-ecological zones: the delta and coastal zone, the dry zone, and the hill regions.

- The delta and the costal zone is the most densely populated, provides easy access to water, and predominantly engages in rice and fish production;
- Agriculture production generally takes place in river valleys in the dry zone, where rain-fed upland crops and paddy are produced;
- The hill regions are amenable to tree and horticultural crop and less suitable for intensive farming.

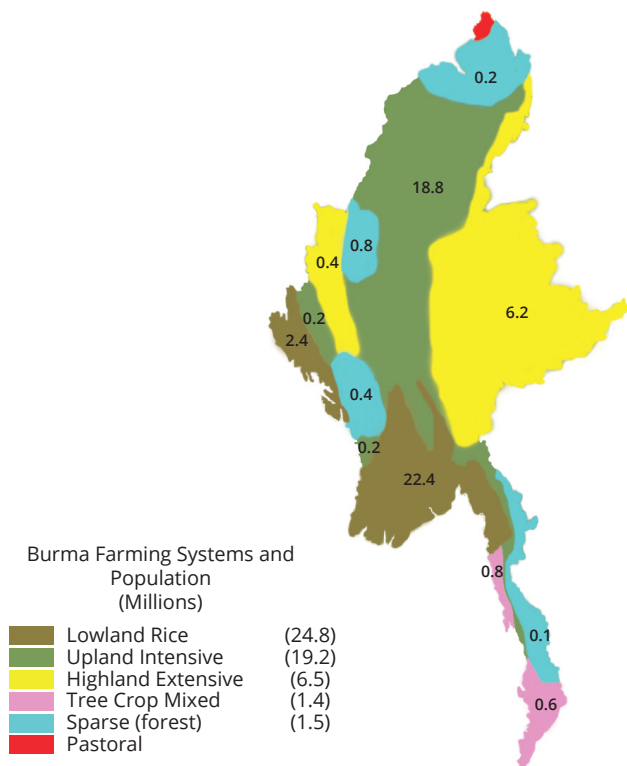


Table 1: Distribution of Major Farming Systems and Population in Myanmar (Source: USAID 2013)

## 1.1 CURRENT MARKET SITUATION

Compared with international standards or even regional peers, agriculture is a very labour-intensive industry in Myanmar; most agricultural activities are carried out manually with low levels of mechanization, which results in low productivity and agricultural output and, consequently, low agricultural wages and farm profits. A farmer in Myanmar only earns about \$1.80–\$2.50 per day in monsoon season compared to \$10.00–\$16.50 per day in Thailand and \$7.80 per day in the Philippines.

Moreover, investment in this sector remains minimal and the industry lacks modern warehousing, distribution and logistics facilities, packaging and branding. Myanmar farmers also do not use enough fertilizer with the correct nutrient balance, partly due to lack of knowledge and training. Farmers also lack access to irrigation systems; in 2014–2015, only 15% of crop area was connected to public irrigation systems.

Poor quality seeds also hinder the agricultural sector's ability to reach its full potential. Although the government has seed distribution schemes, they are under-resourced. According to the World Bank, the supply of certified paddy seeds only meets about 1% of the demand. Further, due to a poor enabling environment in Myanmar, private seed providers have not been able to produce enough to meet demand, nor import the required amounts of quality seeds. As a result, many Myanmar farmers use saved seeds, thus producing low yields.

Agricultural land is currently under-capitalised and farmers have very limited access to credit except to borrow capital at high interest rates. At the end of 2012, the Myanmar Agriculture Development Bank (MADB) provided loans to 1.87 million clients, mostly smallholder farmers. MADB only provides loans to cover a fraction of production costs for up to 10 acres; the bank does not support medium or large holder farmers. In total, 88% of those loans are provided to small farmers engaged in paddy production and are only large enough to purchase inputs for the following cropping season; they are often insufficient for the purchase of farm tools and equipment.

Farmers can take out 12-month loans of MMK 100,000 per acre for up to 10 acres if they are growing paddy and sugar cane.

Those growing sesame, pulses and peas, sorghum, and corn can take out loans of up to MMK 20,000 per acre. The interest rate is 5% per annum.

Other sources of funding:

- The government has also been providing low interest loans to farmers under cooperatives;
- Private microfinance institutions (MFIs) offer loans at low interest rates. However, they are limited by geographical reach and caps in loan size;
- Informal sources of credit, such as private money lenders, have become a major source of capital for many farmers. Money lenders usually charge a monthly interest rate of 10–20%.

Despite these challenges, the agricultural sector has the potential for rapid growth if farmers are provided with better access to capital, quality seeds, improved infrastructure, and modern technology.

Private sector investment in agriculture and in agribusinesses has also started picking up, including in fertilizer manufacturing and seeds and production of animal feed. Livestock and fisheries sectors would benefit from better quality animal feed; fish processors have already gained from improved quality of supply, and have accreditation for export from the EU.

## 1.2 LOCATION OF AGRICULTURE PRODUCTION SITES

Agriculture products mainly come from five regions: Ayeyarwady, Sagaing, Bago, Magway and Mandalay. About 70% of the cultivated land in Myanmar is found in these five regions.

The following map shows major crops by zones.

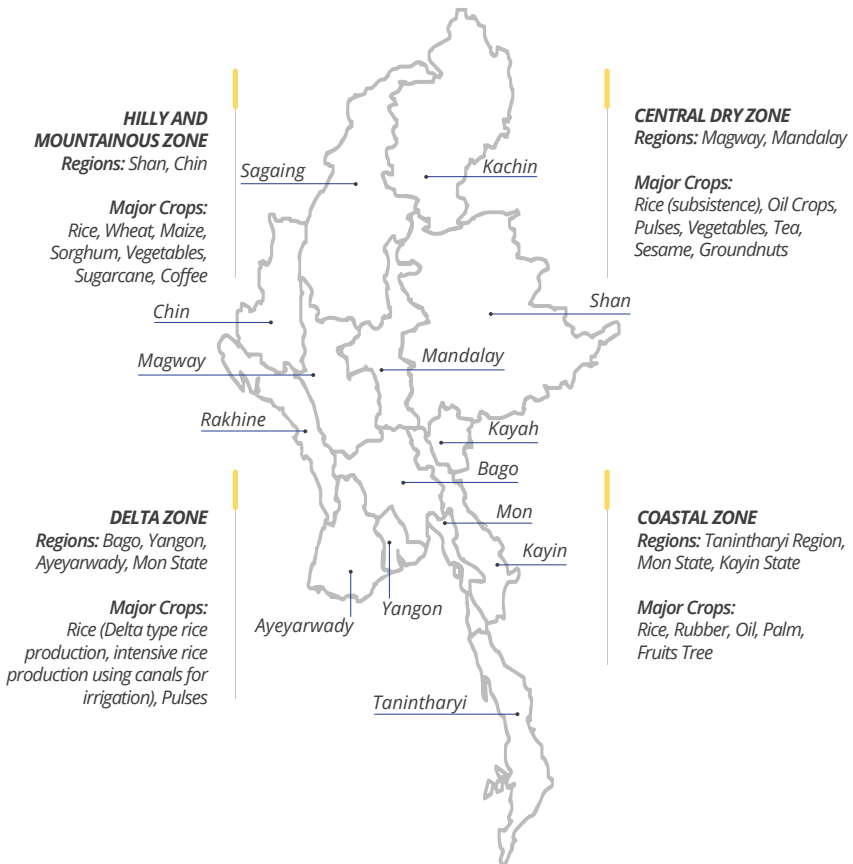


Figure 1: Map of Myanmar

## 1.3 TYPES OF AGRICULTURE PRODUCTS

Paddy is sown on 15,658 thousand acres of land (48% of net sown land) and is the most common crop choice for farmers. However, paddy output decreased due to the 2015 floods and volatile growth despite high prices and strong demand for rice from China in the first two quarters of 2016–2017.

Productivity challenges include:

- Insufficient supply of quality seeds;
- Rise in fertilizer prices and lack of knowledge on soil nutrient management and;
- Slow pace of mechanisation.

Many farmers switched to producing beans and pulses in June–July 2016, driven partly by rising demand from India and China and from new markets in Japan, Korea, EU, and the US. Beans and pulses formed 28% of total sown area and 64% of value added crops. The World Bank forecasted beans and pulses to grow to 5% in 2016–2017.

## 1.4 AGRICULTURE SECTOR STATISTICS

According to official figures from the Directorate of Investment and Company (DICA) Registration, from 1998 up to 30 September 2017, there have been only 23 enterprises for Foreign Direct Investment (FDI) in the agricultural sector, which amount to USD 380 million or 0.51% of total FDI.

In terms of local investment, currently there are only nine Myanmar enterprises with a total investment of about USD 52 million in the sector, contributing 0.35% of the total investment by local companies permitted under the Myanmar Citizens Investment Law.

The agriculture sector contributes around 25–30% of export earnings, according to data from the Department of Agricultural Planning under the Ministry of Agriculture, Livestock and Irrigation. Pulses are the country's largest agriculture commodity export valued at USD 1.1 billion in 2015–2016.

The following tables show the export earnings and production volume of selected crops, as per the Ministry of National Planning and Economic Development.

### Export by Commodity in MT

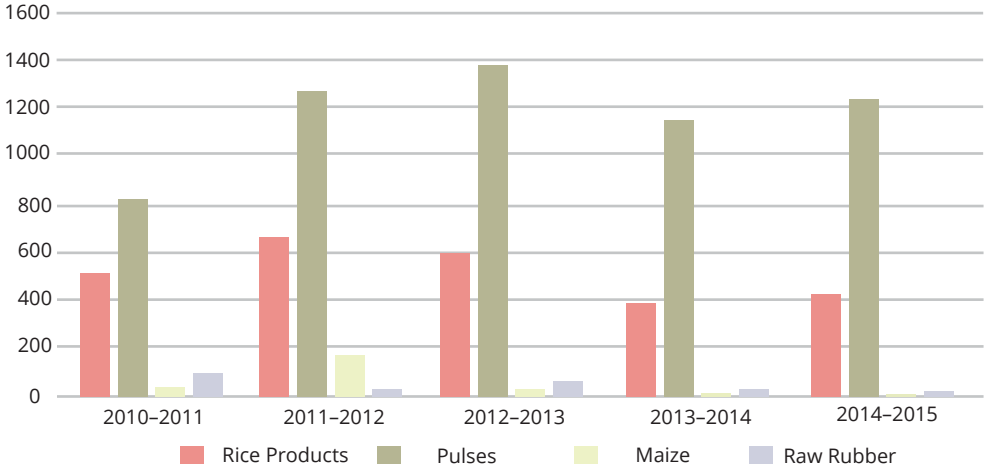


Figure 2: Export Volume of Selected Crops  
(Source: Ministry of National Planning and Economic Development, 2015)

### Export by Commodity in USD Millions

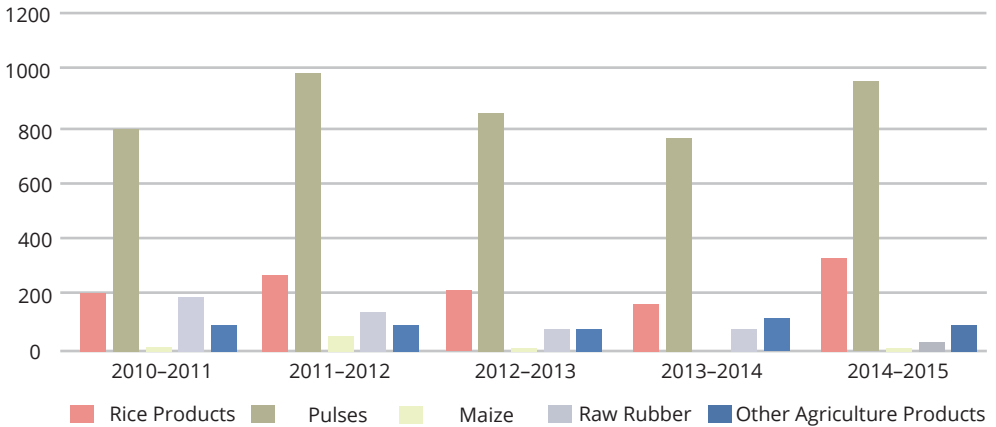
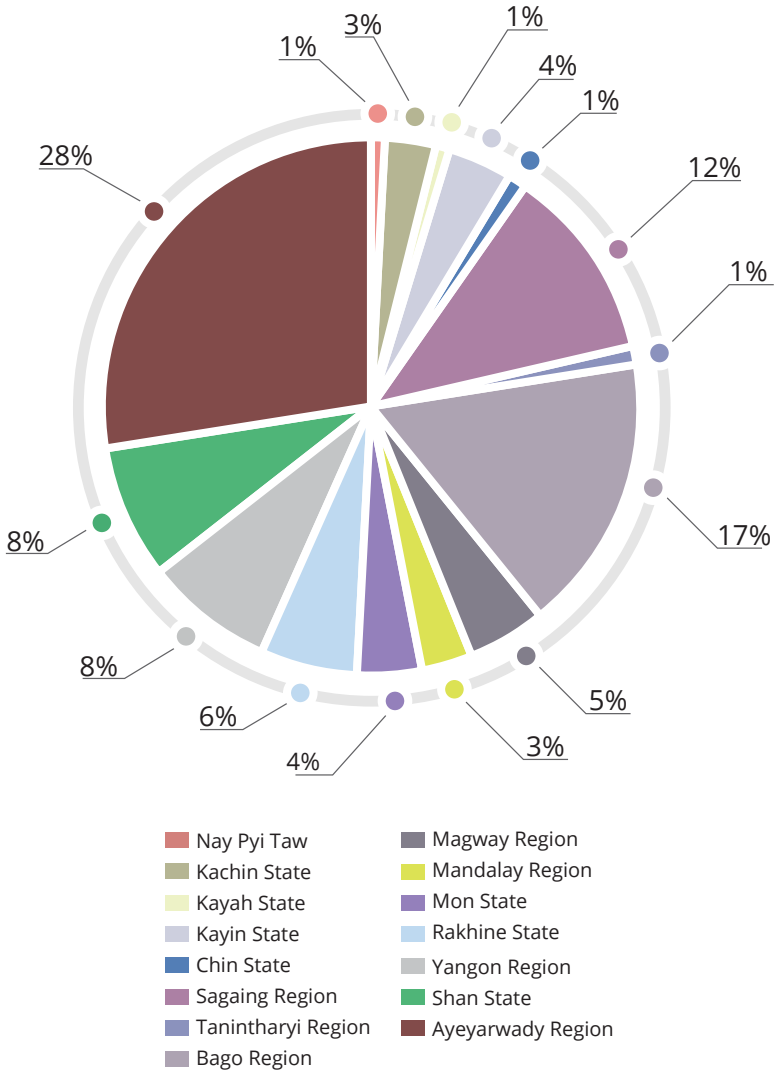


Figure 3: Export Amount of Selected Crops  
(Source: Ministry of National Planning and Economic Development, 2015)

The following chart shows the production of rice by region.

*Rice Production per Region 2015–2016*



*Figure 4: Rice Production per Region 2015–2016  
(Source: Ministry of National Planning and Economic Development)*

The following shows production and growth rates of milled rice per year.

*Myanmar Milled Rice Productions per Year (1000 MT)*



Figure 5: Myanmar Milled Rice Production per Year (Source: IndexMundi)



## 2 INVESTMENT OPPORTUNITIES

Public tenders from the Ministry of Agriculture, Livestock and Irrigation are rare, and most of them are related to the purchasing of farming equipment from both local and international companies.





## 2.1 POTENTIAL UPCOMING TENDERS

With insufficient supply of machines, equipment, and technology to enhance Myanmar's agricultural sector, potential tenders in this area may be issued in the near future.

The Asian Development Bank (ADB) has developed a Country Partnership Strategy (2017–2021) to support sustainable inclusive growth. This five-year strategy will prioritise three key sectors, including agriculture and irrigation, rural infrastructure development, and private sector initiatives.

The government has also drafted a five-year Agriculture Development Strategy (ADS) investment plan with three main outcomes outlined:

- Enhanced capacity of government to design, create and implement policies and plans;
- Increased agricultural productivity and income of smallholder farmers;
- Enhanced market linkages and competitiveness of Myanmar farmers and agro-enterprises.

The development of the ADS signals that agriculture is a priority sector for the government; tender openings are likely to follow.

Further, there may be tender opportunities from donors; donor funding for agricultural development is forecasted to increase by 280% from USD 131.4 million in 2010–2015 to USD 499.6 million in 2016–2022.

- Out of the categories for investment, infrastructure received 48.3% of all investment and is expected to increase to 53.9% of all investment during 2016–2022.

Investment within other categories is also forecasted to rise:

- Investment in production enhancement is expected to increase by 313% between 2016–2022;
- Investment in capacity development of education, extension and farm organizations is expected to increase by 202% between 2016–2022; and,
- Investment in policy, regulations and governance is expected to increase by 230% between 2016–2022.

## 2.2 POTENTIAL OPPORTUNITIES FOR FOREIGN COMPANIES

When considering potential investment opportunities with local companies, it is important for foreign investors to analyse the strengths and weaknesses of local companies as well as the challenges that constrain their expansion in this sector.

### *Strengths*

The strength of Myanmar agriculture companies lie in their ability to understand and to respond or adapt to the needs of the local markets and stakeholders, especially farmers. Considering the Myanmar market was closed until 2012, local companies have first mover advantage.

### *Weaknesses*

Despite having first mover advantage, local companies are also constrained by a number of factors, including lack of access to capital, technical knowledge, and human resources.

One of the major weaknesses in Myanmar's agriculture sector is the lack of advanced technology in processing and in farming practices used by agribusinesses. Further, local companies have not invested in research and development to innovate farming methods and to adapt to unpredictable weather patterns in Myanmar. These shortcomings in turn provide foreign investors with an opportunity to invest and enhance capacity, including introducing new seed varieties to farmers.

Local companies have also been weak in ensuring proper quality standards of their agricultural products, which has often resulted in poor price / quality ratios. This is partly because there is little regulation of quality of agricultural inputs and exported agricultural products, which has resulted in cases where agricultural exports to foreign markets have been rejected due to quality issues. In an attempt to purchase quality products, the EU imports from firms trained in Good Agricultural Practices (GAP) standards.

In addition, local companies have been reluctant to make capital investments, such as mechanising processing facilities to enhance productivity. Productivity issues are compounded by a lack of proper storage and transport facilities and processing techniques. Only 8% of 1361 rice mills in Myanmar have the capacity to mill more than 100 tonnes per day, and only 10% can produce high-quality rice for export as most mills rely on antiquated machinery.

### *Challenges*

A disconcerting obstacle in investing in Myanmar is the issue of land tenure and confiscation. Government failure to give full compensation to landowners, coupled with a lack of secure land rights, pose problems in land acquisition for potential investors.

Other challenges include poor infrastructure, resulting in high-cost transportation system, poor water control systems, weak rural financial institutions, and low public investment in agricultural research; however, the government is working with development partners to address these issues.

## 2.3 AREAS OF INVESTMENT FOR FOREIGN INVESTORS

There is potential for foreign investors to engage in diversification of value-added crops to meet market demands and export targets. Currently, foreign investment into the agriculture sector is only 0.5% of total foreign investment.

There are five areas foreign investors could focus on:

- Input industries (seed, fertiliser, agrochemical, farm industry, machineries, irrigation system and facilities);
- Production and processing industries (crop production, value-added production research and development);
- Wholesales market industries;
- Service industries (credit and insurance, service support for supply chain); and,
- Aquaculture.



# 3

**3 GOVERNMENT RULES AND  
REGULATIONS ON FOREIGN  
INVESTMENT**

### 3.1 GENERAL INVESTMENT RULES

The new Myanmar Investment Law (MIL) was signed in October 2016 and has been effective since April 1, 2017; the MIL combines the Foreign Investment Law (FIL) 2012 and the Citizens Investment Law 2013. The new investment law was created to attract both foreign and local investors by simplifying the application process and offering tax breaks, incentives, rights and protections for businesses.

The key points of MIL are:

Key Change	Description
Ease of Foreign Investment	Foreign Investors are permitted to own 100% of businesses which are not on restricted or prohibited lists.
Investment Screening	An investor may submit an investment screening application to the Myanmar Investment Commission (MIC) for non-bidding guidance on whether a proposal investment: <ul style="list-style-type: none"> <li>• Requires an MIC Permit application;</li> <li>• Requires Pyidaungsu Hluttaw (Union Parliament) approval prior to Permit issuance;</li> <li>• Is prohibited or restricted under the MIL and related notifications;</li> <li>• In a Promoted Sector under the MIL and related notifications.</li> </ul>
Devolvement of Authority for Endorsement Application	Application with investments less than USD 5 million in non-strategic and non-restricted sectors will be handled at the State / Regional level, with close involvement of the State / Regional DICA officials.
Removal of Blanket Incentives	Business may be granted tax exemptions if investments are in promoted sectors – the duration of tax exemption is contingent upon the areas in which business set up operations. <ul style="list-style-type: none"> <li>• Less developed regions (Zone 1) granted 7 years of tax exemption;</li> <li>• Moderately developed regions (Zone 2) granted 5 years of tax exemption;</li> <li>• Adequately developed regions (Zone 3) granted 3 years of tax exemption.</li> </ul>
Long-term Land Lease possible beyond MIC Permit	Foreign investors may lease land for their business for up to 50 years (+ 10 years + 10 years with approval from MIC) with private landlords or government entities.

Key Change	Description
Compensation for Expropriation	<p>Expropriation of investments is allowed under the following conditions:</p> <ul style="list-style-type: none"> <li>(a) necessary for the public interest;</li> <li>(b) carried out in a non-discriminatory manner;</li> <li>(c) carried out in accordance due to process of law;</li> <li>(d) on payment of prompt, fair and adequate compensation.</li> </ul>
Grievance Mechanism	<p>MIC will establish and manage a grievance mechanism to inquire and resolve issues before escalation to legal disputes, and to prevent the occurrence of disputes.</p>

Under the MIL, a foreign investor is allowed to conduct business in Myanmar as a:

- 100% foreign-owned entity in permitted sectors;
- Joint venture with foreign, local, or government entities.

Promoted sectors for investment include:

- Agriculture and related services;
- Plantation and conservation of forest;
- Livestock production, breeding and production of fishery products.

Investments that are deemed strategic for the government include “occupying or using more than 1,000 acres of land for agriculture-related purposes”.

## Myanmar Investment Commission (MIC)

Investors must submit a proposal to MIC only if the investments are:

- Activities essential to the national strategy;
- Large capital intensive investment projects;
- Likely to cause a large impact on the environment and local community;
- Use state-owned land and buildings;
- Designated by the government as necessary to submit the proposal to the committee.

## *Upcoming Laws*

A new piece of legislation called the Myanmar Companies Act was submitted to the upper house of Parliament in July 2017 and will replace an older version of the Act drafted in 1914. The act will improve corporate governance by allowing:

- More flexible capital structures and changes to capital share;
- Foreign investors will be able to purchase shares in the Yangon Stock Exchange;
- Eliminate the requirement for foreign firms to obtain a permit to trade from DICA;
- Possibility to incorporate a one-person company with a unique director;
- Foreign investors will be able to obtain ownership interest up to a threshold of 35% in a Myanmar company before the company is considered a foreign company.

## **3.2 AGRICULTURE-RELATED RULES AND REGULATIONS**

### **3.2.1 Investment Activities**

According to the MIL, the following qualify as investment activities for both foreign and local investors:

- Enterprise;
- Moveable property, immovable property and rights related to property, cash, pledges, mortgages and liens, machinery, equipment, spare parts, and related tools;
- Shares, stocks, and debentures (a) promissory note of a company;
- Intellectual property rights under any laws, including technical knowhow, patent, industrial designs, and trademarks;
- Claims to money and to any performance under contracts having a financial value;
- Revenue-sharing contract, or production, management, construction, rights under contracts, including turnkey;
- Assignable rights granted by relevant laws or contract, including the rights of exploration, prospecting and extraction of natural resources.

### **3.2.2 Prohibited Activities**

According to the MIL, the following qualify as prohibited investment activities for both foreign and local investors:

- Investment activities which may bring or cause hazardous or poisonous wastes into the Union;
- Investment activities which may bring technologies, medicines, flora, fauna and instruments which are still being tested abroad, or which have not obtained approvals to use, plant or cultivate, except the investments which are made for the purpose of research and development;
- Investment activities which may affect the traditional culture and customs of the ethnic groups within the Union;
- Investment activities which may affect the public;
- Investment activities which may cause an enormous harmful impact to the natural environment and ecosystem;
- Investment activities which manufacture goods or provide services that are prohibited under the applicable laws.

### **3.2.3 Restricted Activities**

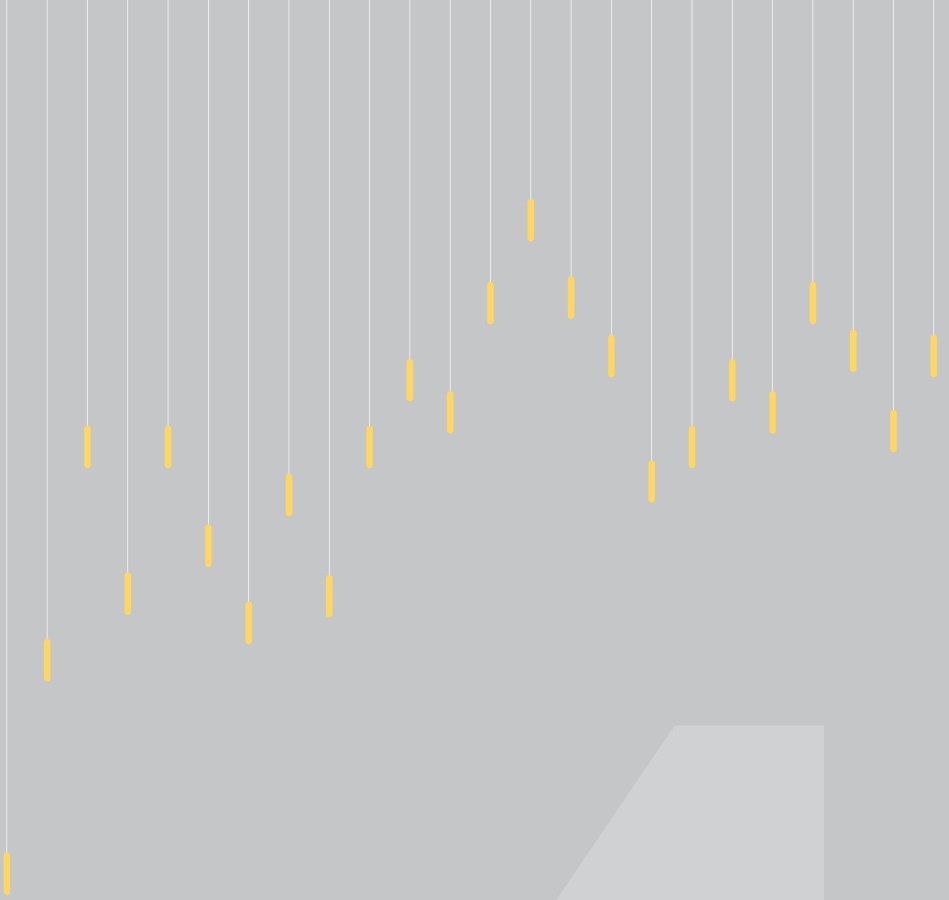
According to the MIL, the following qualify as restricted investment activities for both foreign and local investors:

- Investment activities allowed to be carried out only by the Union;
- Investment activities that are not allowed to be carried out by foreign investors;
- Investment activities allowed only in the form of a joint venture with any citizen owned entity or any Myanmar citizen;
- Investment activities to be carried out with the approval of the relevant ministries.



## 4 OUTLOOK

# 4



The agriculture sector still faces many challenges, including access to technology, capital, and markets and land tenure issues.

However, the Myanmar government is dedicating significant efforts towards developing a sustainable development plan with specific objectives of improving the export sector and the agricultural industry. Myanmar developed a National Export Strategy, with a focus on increasing production and value-added of certain agricultural products, including: beans, pulses and oilseeds, fisheries; forestry products; rice; and rubber. The government has also been attempting to improve the business climate by enacting regulatory reforms to attract investors. The development of the Agriculture Development Strategy plan is promising and signals the government's commitment to improve access to finance, trade facilitation and logistics, and trade information and promotion initiatives. Myanmar is richly endowed with natural resources, has a high land / labor ratio, and a growing domestic market; with correct policies and investments, the agriculture sector in Myanmar has great potential to expand.



# 5 INDUSTRY CONTACT INFORMATION

## 5.1 GOVERNMENT OFFICES

### Ministry of Agriculture, Livestock and Irrigation

The Ministry of Agriculture, Livestock and Irrigation is the focal point for agriculture-related activities.

**MAILING ADDRESS** Director General  
Department of Agricultural Planning  
Ministry of Agriculture and Irrigation  
Building No. 15, Office Compound, Nay Pyi Taw

**CONTACT** +(95) 67 410 106, 410 011

### Ministry of Natural Resources and Environmental Conservation

The Ministry of Natural Resources and Environmental Conservation is the focal point for investment opportunities that require an Environmental Impact Assessment (EIA).

**MAILING ADDRESS** Director General  
Department of Forest  
Ministry of Natural Resources and Environmental  
Conservation  
Building No. 39, Office Compound , Nay Pyi Taw

**CONTACT** +(95) 67 405 477, 405 015, 405 401, 405 399

### Ministry of Commerce

Exporting agricultural produce and importing products such as farm implements can only be done with an export/import license issued by the Ministry of Commerce. Trading licenses for most of the products are issued in Yangon.

**MAILING ADDRESS** Director General  
Department of Trade  
Ministry of Commerce  
Building No. 3, Office Compound, Nay Pyi Taw

**CONTACT** +(95) 67 408 002, 408 265, 408 485

**YANGON OFFICE** No. 228–240, Strand Road, Yangon

The Customs Department is a branch of Ministry of Commerce.

**MAILING ADDRESS** No. 132, Strand Road, Kyauktada Township, Yangon

**CONTACT** +(95) 1 379 423, 379 426 to 9

## Ministry of Planning and Finance

DICA and MIC are the focal points for incorporating foreign businesses; both a part of the Ministry of Planning and Finance.

**MAILING ADDRESS** Director General  
Directorate of Investment  
and Company Administration  
Ministry of National Planning  
and Economic Development  
Building No. 32, Office Compound, Nay Pyi Taw

*Directorate of  
Investment  
and Company  
Administration*

No. 1, Thitsar Road, Yankin Township, Yangon  
+(95) 1 658 143, 657 891, +(95) 67 406 471

*Myanmar  
Investment  
Commission*

No. 1, Thitsar Road, Yankin Township, Yangon  
+(95) 1 657 891, 658 127 to 30

## 5.2 BUSINESS ASSOCIATIONS

Most business associations are formed under the authority of the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI), and are located at the UMFCCI building.

### UMFCCI

**MAILING ADDRESS** No. 29, Min Ye Kyaw Swar Street, Lanmadaw Township, Yangon.

**CONTACT** +95 1 231 4344 ~ 49 (Ext: 122)

**EMAIL** ird@umfcci.org.mm, ird@umfcci.com.mm

- Myanmar Rice Millers Association
- Myanmar Pulses, Beans & Sesame Seeds Merchants Association
- Myanmar Rice & Paddy Traders Association
- Myanmar Edible Oil Dealers Association
- Myanmar Forest Products and Timber Merchants Association
- Myanmar Paddy Producers Association
- Myanmar Farm Crop Producers Association
- Myanmar Fruit, Flower and Vegetable Producer and Exporter Association
- Myanmar Agro-based Food Processors and Exporters Association
- Myanmar Onion, Garlic and Culinary Crops Production and Exporting Association
- Myanmar Rubber Planters and Producers Association
- Myanmar Perennial Crop Producers Association
- Myanmar Sugar Cane and Sugar Related Products Merchants And Manufacturers Association
- Myanmar Rice Federation
- Myanmar Fertiliser Seed And Pesticides Entrepreneurs Association
- Myanmar Oil Palm Producers Association
- Myanmar Wheat Association

## 5.3 OTHER RELEVANT INSTITUTIONS

Besides associations formed under the UMFCCI, there are several other relevant standalone associations, listed below.

### Myanmar Farmer Association

<b>MAILING ADDRESS</b>	No. 29, Room (901-903), Min Ye Kyaw Swar Street, Lanmadaw Township, Yangon
<b>CONTACT</b>	+(95) 1 218 266 ~ 68, +(95) 9- 730 236 88
<b>EMAIL</b>	myanmarfarmer@gmail.com
<b>FAX</b>	+(95) 1- 218 226

### Myanmar Organic Agriculture Group

<b>MAILING ADDRESS</b>	No. 28, Min Ye Kyaw Swar Street, Lanmadaw Township, Yangon
<b>CONTACT</b>	+(95) 1 644 217

## Myanmar Coffee Association

<b>MAILING ADDRESS</b>	No. 13, Nanda Street, 6 Ward, Pyin Oo Lwin Township, Mandalay
<b>CONTACT</b>	+(95) 1 201 1489
<b>EMAIL</b>	koyemyint@gmail.com

## Myanmar Agribusiness Public Corporation (MAPCO)

<b>MAILING ADDRESS</b>	No. 100, Corner of Wardan Street and Kan Naw Street, beside the Concrete Express Way, Wardan Port Area, Seik Kan (Port) Township, Yangon
<b>CONTACT</b>	+(95) 1 230 1652 ~ 53, 230 1825 ~6
<b>EMAIL</b>	admin@mapco-ygn.com

## ANNEX Table: Production of Major Crops in Tonnes

The following tables show the production of major crops in tonnes.

<b>Cereals</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>
Paddy	32,065.1	28,552.1	26,216.6	26,372.1	26,423.3	26,210.3
Wheat	181	169.8	177.6	182.9	182.4	179.3
Maize	1,354.4	1,461.5	1,501.6	1,600.6	1,693.4	1,748.5
Millet	212.6	219.2	210.5	225.1	238.8	240.3

<b>Oil Seeds</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>
Groundnut (Rain)	529.3	554.8	584.9	611.6	635.7	643.1
Groundnut (Winter)	840.8	822.7	843.5	853	865.9	874.8
Sesamum (Early)	528.5	573.9	521.7	539.8	519.4	543.3
Sesamum (Late)	258.9	258.2	272.9	277.3	282.2	284.1
Mustard	87.1	60.5	51.1	50.5	48.5	48.6

<b>Pulses</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>
Malpe (Black Gram)	1,578.3	939.4	1,058.3	1,076.1	1,079.9	1,142
Pedisien (Green Gram)	1,338.1	918.8	947.9	992.3	1,049.6	1,090
Butter Bean	82.8	79.5	80.8	82.7	84.6	90.2
Bocate (Cow Pea)	214.7	163	55.6	115.1	115.2	117.4
Sultani	15.5	14.9	16.8	19	17.3	19
Sultapya	115.9	116.5	131.5	134.1	133.2	135.1
Pelun	191	115	125.6	127.9	128.3	131.1
Pesingon (Pigeon Pea)	824.2	580.1	549	578.8	575.1	602.3
Peyin (Rice Bean)	53.5	38.3	39.3	39.3	39.3	40.4
Pebuygale (Duffin Bean)	10.9	11.6	12.6	13.3	13.2	14
Peygi (Lablab Bean)	132.3	133.1	145.1	149.3	152.7	157
Pegya (Lima Bean)	15.9	15.1	14.8	15.7	14.9	13.1
Sadawpe (Garden Pea)	67.2	46.4	46.3	48.6	48.7	50.2
Peyazar (Lentil Bean)	1.4	1	1	0.9	1	1.1
Peanuk (Krishnamung)	130.7	86.3	87.1	91.9	95.9	96.3
Gram (Chick Pea)	459.4	465.6	517.1	562.2	570.7	571.5



<b>Pulses</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>
Peboke (Soy Bean)	254.5	161.9	162.6	160.6	156.5	154.3

<b>Beverages</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>
Tea	94.5	92.5	94.6	96.3	98.6	99.7
Coffee	7.3	7.6	8	8.1	8.4	8.3
Sugarcane	9,249.5	9,537.4	9,413.1	10,307.4	11,128.4	10,142.4
Toddy Palm	415	416.7	391.3	406.7	403.2	380.9

<b>Vegetables and Fruits</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>
Potatoes	563.6	555.7	551.1	540.1	542.3	560.3
Plantains	190,163	190,967	190,619	197,057	208,127	221,614

<b>Fiber</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>
Cotton (Wagyi)	15.8	15.7	14.9	16.3	16.6	16.5
Cotton (Mahlaing 5/6)	20.7	20	14.8	15.4	13.9	14.1
Cotton (Long Staple)	504.6	489.2	429.7	469.4	493.6	482.3
Kenaf	12	8.1	1.3	1.1	1.4	1

<b>Miscellaneous</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>
Rubber	126.2	147.3	161.8	174.1	194.9	208.7
Coconut	430,855	478,057	490,717	510,412	509,177	508,666

Table 2: Production of Crops in Tonnes (Source: Ministry of National Planning and Economic Development 2016)

<b>Investment Category and Programme</b>	<b>2010-15 (\$m)</b>	<b>2016-22 (\$m)</b>	<b>2016-2022 only (%)</b>
<b>1) Infrastructure</b>			
New Irrigation	960,504	15,086,805	5.60%
Rehab/Upgrade of Existing Irrigation	60,212,790	248,933,737	92.50%
Agro Processing	1,031,577	1,132,163	0.40%
Other Investments	1,258,152	3,939,217	1.50%
Sub-Total	63,463,023	269,091,922	-
Sub-total as Percentage of Grand Total	48.30%	53.90%	-

<b>2) Production Enhancement</b>			
Seeds	2,555,131	8,120,384	10.50%
Soil Nutrient Management/ Fertilizers	2,888,546	7,879,871	10.20%
Plant Protection		1,004,608	1.30%
Agricultural Mechanisation	4,222,917	9,919,671	12.90%
Access and Use of New Agricultural Practices	5,533,323	10,785,912	14.00%
Water Management Practices	2,446,734	5,132,985	6.70%
Other Climate Smart Agriculture	113,469	20,249,969	26.30%
Other Programs	870,204	13,957,042	18.10%
Sub-Total	18,630,324	77,050,443	100.00%
Sub-total as Percentage of Grand Total	14.40%	15.40%	-
<b>3) Capacity Development of Education, Extension and Farm Organizations</b>			
Ag Extension	8,492,952	25,749,982	28.80%
Veterinary Services	499,088	12,928,521	14.50%
Fisheries / Aquaculture Extension	3,397,459	16,545,984	18.50%
University Curriculum Development	725,000	3,355,913	3.70%
Agricultural Producer Cooperatives	1,553,170	2,644,690	3.00%
Water User Groups	701,552	9,581,144	10.70%
Sector Associations / Trade Associations / Interest Groups	1,509,059	1,478,437	1.60%
Other Programs	12,727,810	17,117,261	19.20%
Sub-Total	29,606,091	89,401,930	100.00%
Sub-Total as Percentage of Grand Total	22.50%	17.90%	-
<b>4) Policy, Regulations, and Governance</b>			
Land Access and Management	8,414,595	2,675,299	4.20%
Water Management	740,561	661,947	1.00%
Fishery Resource Management	746,382	51,074,074	79.70%
Sanitary and Phytosanitary Issues	705,207	948,957	1.50%
Food Safety and Traceability	705,207	948,957	1.50%
Gender Related	648,860	646,370	1.00%

Agricultural Policy, Value Chains, Ag Inputs, and Others	7,691,872	7,108,674	11.1%
Sub-Total	19,652,684	64,064,278	100.50%
Sub-Total as Percentage of Grand Total	15.00%	12.80%	-
<b>Grand Total</b>	<b>131,352,122</b>	<b>499,608,573</b>	-

*Table 3: Forecasted Donor Investment Amount (Source: Agriculture Development Strategy Draft 2016)*



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