The Myanmar Agriculture Network
Supported by Grow Asia
Myanmar has the potential to be an agriculture powerhouse, while also ensuring national food security. Given the combination of its historic position of being the world’s largest rice exporter, with fertile soil, abundant water and a favourable climate, Myanmar is well-poised to be an agriculture hub for Asia. Crops of interest include rice, fruit and vegetables, coffee, sugar, and dairy, where there is strong potential to increase smallholder farm productivity and incomes. There is also significant opportunity to improve the agriculture sector by leveraging mobile technology in order to provide access to information and knowledge, as well as finance for smallholders. A more open economy provides an opportunity to develop innovative, market-based approaches to agriculture development through formal value chains based on productivity increase and consumer demands. Effective government policies, combined with private-sector-led investment and innovation, and supported by civil society, donors and others have the potential to enable Myanmar agriculture to rise to its potential.
The Myanmar Agriculture Network (MAN) was established in 2013 under the leadership of the Ministry of Agriculture and Irrigation, local and global businesses, and other stakeholders. The Network serves as a multi-stakeholder platform to accelerate partnership opportunities and investment in food security, along with environmentally sustainable and inclusive agricultural growth in Myanmar. It engages more than sixty organizations, including the Government of Myanmar, global and local private sector, civil society, international and donor organizations, and farmers’ associations.

MAN is part of Grow Asia, which is a multi-stakeholder partnership platform for inclusive and sustainable agricultural development in South East Asia and is convened by the World Economic Forum and the ASEAN Secretariat.

30:30 Vision
The Network has a Myanmar 30:30 Vision: to generate $30 billion in agricultural output in Myanmar by 2030, with a particular emphasis on smallholder farmers. This aligns with the Grow Asia aim of helping smallholder farmers improve their productivity, profitability and environmental sustainability by 20% by 2020.

Objectives
The Network has a clear objective of smallholder engagement and development, including increasing:

- Farm productivity by enhancing access to knowledge, information, inputs and technology, especially through farmer training.
- Smallholders’ profitability by providing access to finance and links to formal markets, and investing in infrastructure.
- Food safety and quality by helping farmers adhere to standards and certification, including for export markets.

Working Groups
The Myanmar Agriculture Network aims to increase investment in agriculture by developing specific value-chain initiatives focused on priority commodities, and convening stakeholders on cross-cutting solutions. Working Groups have been set up for six crops (coffee, dairy, horticulture, rice, sugar and tea), and for cross-cutting issues including seed sector issues, mobile technology solutions, and access to finance.

A Core Committee, comprising the leaders of the Working Groups and other stakeholder representatives, oversees the activities of the Network. It provides advice and support to Working Groups, monitors progress, and engages with potential partners and relevant stakeholders.

“As co-chair of the Myanmar Agriculture Network, I have seen a genuine appetite from multinationals, local companies, donor agencies and NGOs to invest in agriculture value chains and work together. And we are galvanized by the belief that investment in this sector will positively impact rural and economic development.”

David Pettinari
Country Manager, Nestle Myanmar and Co-Chair of MAN from 2013-2016
Coffee

Partners

Plans and Targets
Focusing on Robusta coffee:

— Training local farmers in techniques for grafting and pruning, rejuvenation, harvest and post-harvest management, and coffee quality and cup tasting, in collaboration with the Ministry of Agriculture and Irrigation. Around 300 farmers and NGO workers have been trained to date.
Target: train 600 farmers by end of 2016

— Training officers from the Ministry of Agriculture on these crop development and management techniques. As of mid-2016, 25 officers have been trained, with more being sent to Thailand for training.
Target: train all relevant officers by end of 2016

— Coffee plantation in Kawthuang to establish potential and suitability of commercial coffee exploitation.
Target: establish coffee trial plots, and provide training in Kawthuang region

— Identification of the most suitable coffee varieties. Currently, four different plots in Kyauk Taing, Kawthuang and Bago are testing 29 varieties of coffee plants, to establish which ones are best suited to local soil and climate conditions.
Target: identify 4 varieties by end of 2018

Quality Certification
Nestlé has provided specifications of standard coffee quality (comparable to Thailand), to the Ministry of Agriculture and LIFT.

Dairy

Partners

Focus areas
Developing demonstration sites and engaging smallholders to provide training in animal husbandry, hygiene, livestock management and nutrition, as well as provide market access.

Horticulture

The Myanmar Agriculture Network is working on two horticulture projects:

Project 1
Concentrated in Shan State and the Dry Zone along the Irrawaddy River corridor between Sagaing, Mandalay and Magwe Divisions, the project includes:

— Demonstration plots of irrigation systems in Taungyi, South Shan and Central Dry Zone (CDZ) area of Pagan and Mandalay.

— Successful trial of paddy crops with water drip irrigation system to reduce greenhouse gas emissions by reduction of fertilizer usage by 30-40% with at least 50% less usage of water.

— Implementation of a new drip system with smallholder farmers.

— Conducting trainings for farmers covering post-harvest, handling and logistics, environmental protection, food safety and processing.

— Initiating potato farming and training smallholder farmers to become more commercially successful through yield increase.
**Partners**

LIFT, Netafim, Netherlands Economic Mission to Myanmar, PRIME Agri.

Yoma Holdings, in partnership with FMI and other foreign investors, is investing in vegetable processing for the European market, commercial vehicle leasing, cold storage, and logistics, including upgrading Mandalay’s airport to enable the exporting of fruits and vegetables. The aim is to include smallholder farmers in these efforts.

**Project 2**

The Vegetable Sector Acceleration Task Force (VSAT) was established in March 2015. Its aim is to contribute to improving food and nutrition security in Myanmar, and generate both rural employment and income for vegetable growers, on the basis of sustainable practices.

- VSAT team visited Vietnam to study its vegetable sector and learn about its market approach and consumption patterns. This will inform its study of the supply chain in Myanmar.

- A research paper on vegetable was produced based on major markets in Yangon and Mandalay.

- A white paper on the vegetable wholesale market white paper has been developed.

- VAST is working with the Agriculture Science Institute to develop an agri-education system.

- VSAT is reviewing the regulation on pesticide registration in Myanmar in accordance with international standards.

**Partners**

East-West Seed, PepsiCo, USAID, Yoma Holdings, Mercy Corps.

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**Rice**

**Partners**

APBABC-Heineken, Bhuler Group, CPCL, New Holland, ICCO Cooperation, MAPCO, Mercy Corps, Myanmar Awba, Myanmar Rice Federation, Syngenta, Olam.

**Focus Areas**

Myanmar was once the largest rice exporter in the world, proving that the country is fertile land for rice growing. The rice Working Group, which formed in late 2015, is in the early stages of developing potential projects and partnerships, and identifying the most impactful interventions to improve the existing rice industry. The main issues identified include poor seed quality, bad agronomy practices, overuse of chemicals, no mechanization and no crop rotation. It is anticipated that plans will be formalized for the Working Group in 2016.

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“Transforming farmers to agribusiness entrepreneurs is the key to improving sustainable agricultural productivity for ensuring our future food security.”

**U Tin Htut Oo**

Policy Advisor to MAN
Sugar

Partner
Wilmar Holdings.

Focus Areas
Develop a commercial sugar plantation and extend support to smallholder farmers by:
— Providing training, support and technology (mainly heavy equipment).
— Investing in an irrigation project and road maintenance.
— Ensuring food safety and quality.

Agri-Finance and Mobile Services

Partner
Awba Group, Impact Terra, LIFT, Mercy Corps, MADB, MMFA, Proximity Design.

Focus areas
— Test different models for financing smallholders and farmers.
— Explore opportunities to provide loans, including warehousing options.
— Pilot micro-insurance projects.
— Develop mobile solutions.

Awba Group has developed an application for farmers that can be used on an Android phone across mobile operators, to provide information including weather and agronomic advice (in partnership with the agriculture university) as well as provide mobile money services. It is currently being used by approximately 1000 users. Also in consideration is a crop insurance scheme via mobile.

Tea

Partner
Thuriya Win.

Focus areas
The newly-formed tea Working Group is looking for solutions to the significant challenges faced by Myanmar’s tea sector. Tea plantations in Shan State are in the middle of a conflict area, and some plantations are now 100 years old and in need of significant investment. There is also a critical shortage of farmers, who can earn more as migrant workers across the Chinese border. Projects, plans and partners will be identified in 2016.

Test different models for financing smallholders and farmers.
— Explore opportunities to provide loans, including warehousing options.
— Pilot micro-insurance projects.
— Develop mobile solutions.

There is a lack of good quality seed in Myanmar for a number of crops including vegetables, potato and rice. The Working Group aims to explore the option of forming a national-level Seed Association, involving local and international companies, to support the government in developing certified and registered seeds that can be made available to farmers at scale through clean seed production and processing. Myanmar’s government recently passed the Plant Variety Protection Law, and amended the country’s seed law, both of which will support the development of the seed sector.

Seed Sector

Partner

Focus areas
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“Many people are surprised by the high levels of mobile phone ownership in Myanmar, with an estimated one-smartphone-per-farmer-household. We see this as a huge opportunity: for sharing market data, farmer training apps and mobile payment solutions — all of which will significantly improve the smallholder farmers’ livelihoods.”

Ziv Ragowsky
AWBA Group and lead of Agri-finance and Mobile Services Working Groups.
Grow Asia Myanmar

Partners

The Myanmar Agriculture Network engages over 60 organizations:

Government
Myanmar Ministry of Agriculture and Irrigation
Myanmar Ministry of Livestock Fisheries and Rural Development

Private Sector
Adama
Agro Bio Products Ltd
Andermatt Bio Control
ANZ Bank
APBABC-Heineken
Aventine Ltd
Awba Group
Bayer Crop Science
Buhler Group
CP Yangon
CPCL New Holland Company
DuPont
East West Seed International
ICL Speciality Fertilizers
JJ Pun Co Ltd
Maersk
MAPCO
Myanmar Dairy Nutrition Ltd
Nestlé Myanmar
Netafim
Olam
PepsiCo
PRIME Agri
Seed Asia
Seeds Energy Agro Group
Silvery Pearl Dairy Ltd
Smallholder Prosperity Enterprises (SPE)
SPSH & Associates
Syngenta
Thuriya Win Ltd
Unilever
Wilmar Holdings
Yoma Holdings

Industry Associations
Agriculture and Farmer Federation of Myanmar Food Allied Workers (AFFM – IUF)
Cassava Growers, Millers and Traders Association
Myanmar Coffee Association
Myanmar Fertilizer, Seed and Pesticide Entrepreneurs Association
Myanmar Livestock Federation
Myanmar Microfinance Association (MMFA)
Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI)

Development Partners and International Organizations
Australian Centre for International Agricultural Research (ACIAR)
Cornell University
International Finance Corporation (IFC)
International Fund for Agriculture Development (IFAD)
Livelihood and Food Security Trust (LIFT)
MASHAV
Myanmar Agricultural Development Bank (MADB)
Netherlands Economic Mission to Myanmar
The Asia & Pacific Seed Association (APSA)
US Agency for International Development (USAID)
UN Food and Agriculture Organization (UNFAO)
Yezin Agriculture University

Civil Society
Action Aid
CARE International
Food Security Working Group
GraceWorks Myanmar
ICCO Cooperation
Impact Terra
Mercy Corps
MyanDHRRA
Oxfam
Proximity Designs
TechnoServeWinrock International
World Vision
MAN Priority Area 1
Expanding the number of crop-specific Working Groups

MAN Priority Area 2
Expanding the engagement of local stakeholders, especially civil society and farmer groups

MAN Priority Area 3
Advancing pilot activities and progressing Working Groups

MAN Priority Area 4
Aligning and linking with other partnership platforms and donor-funded initiatives

Engage
www.growasia.org/country-partnerships/myanmar

Engage
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