



Myanmar Pulses, Beans and Sesame Seeds
Merchants Association

Myanmar Pulses & Beans Sector

Soe Win Maung

Consultant

Outline

Introduction

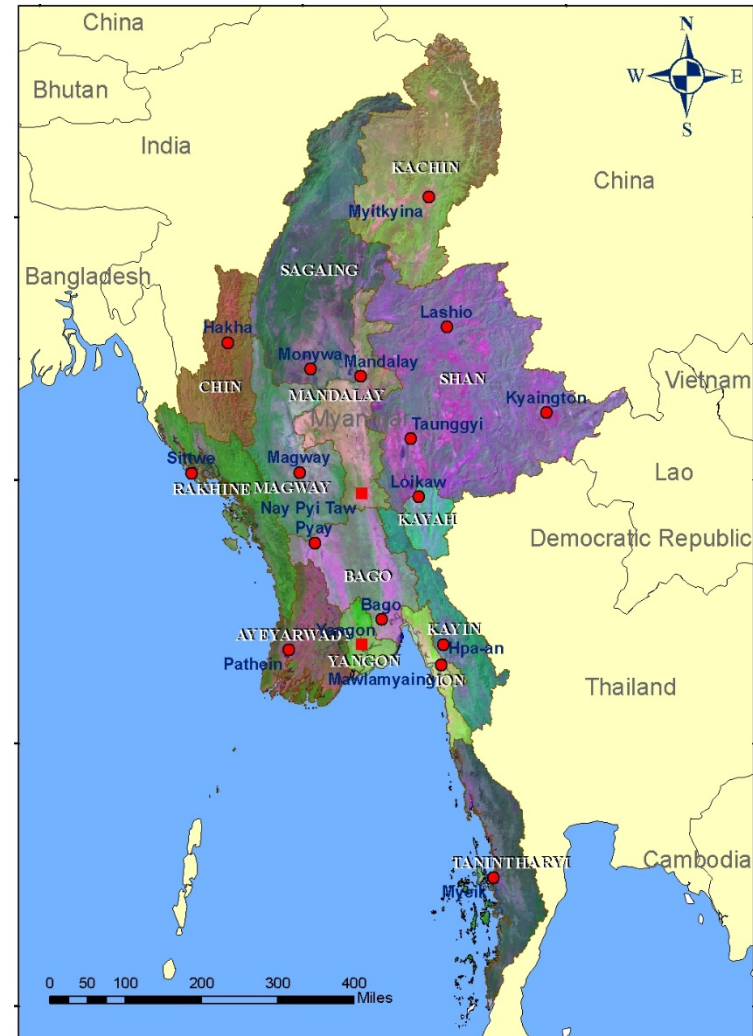
Myanmar Pulses & Beans,
Oilseeds and Maize Sector

- Production
- Consumption
- Export
- Food Value Chain

Business Opportunities

MPBSA

Contact



Introduction

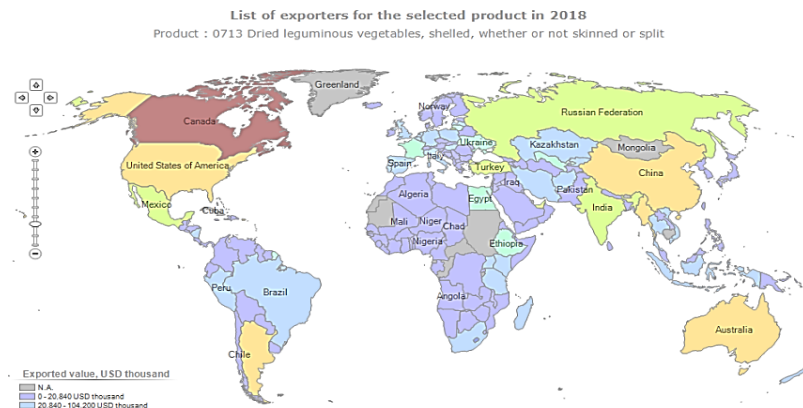
- Myanmar is a traditional **agricultural country** (Agri-GDP: 28.6%)
- Net sown area: **13 mil. ha./** Total crop area: **21 mil. ha./**
Cropping Intensity : **160**
- Characteristics: Dominated by **small farmers/** Low use of agro-chemical/ Low farm mechanization
- Globally, top producer and exporter of pulses (**beans**, dry)
- “**Leading country**” in pulses and bean among ASEAN nations
- **India** and **China** are major markets for Myanmar pulses

World Pulses Export

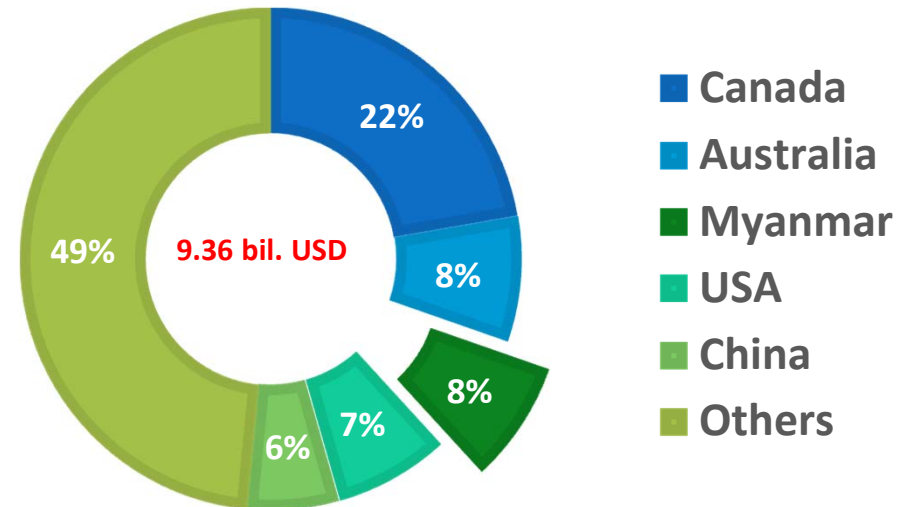
Product: **0713** Dried leguminous vegetables, shelled, whether or not skinned or split

(USD in Thousand)

Exporter	2014	2015	2016	2017	2018
World	10,103,283	11,277,761	12,118,528	11,989,273	9,362,609
Canada	2,900,098	3,305,735	3,104,880	2,652,442	2,084,008
Australia	796,848	1,315,599	1,519,197	2,247,598	756,207
Myanmar	886,219	1,306,388	1,387,966	917,562	735,755
USA	914,955	809,399	1,016,990	1,032,401	692,950
China	775,953	634,709	702,707	606,677	553,484



<https://www.trademap.org/>



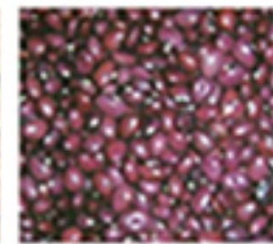
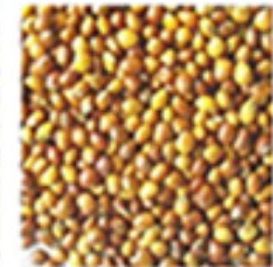
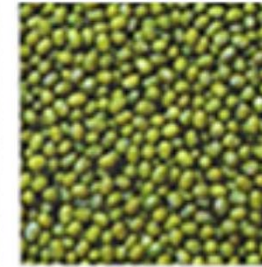
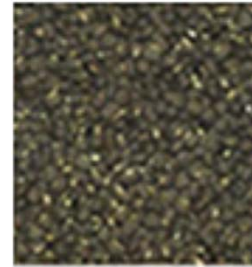
Myanmar Pulses & Beans Sector

- Pulses & beans occupy the largest in sown area after rice
- Grown mainly for export with limited local consumption
- Annual export of 1.2 – 1.4 mil. MT earning 1.0 – 1.2 bil. USD
- One of the priority sectors in National Export Strategy (NES)
- Export mainly as raw and value-added export only 5 – 10%
- High price volatility
- Import of garden pea, yellow pea, etc. to meet local demand



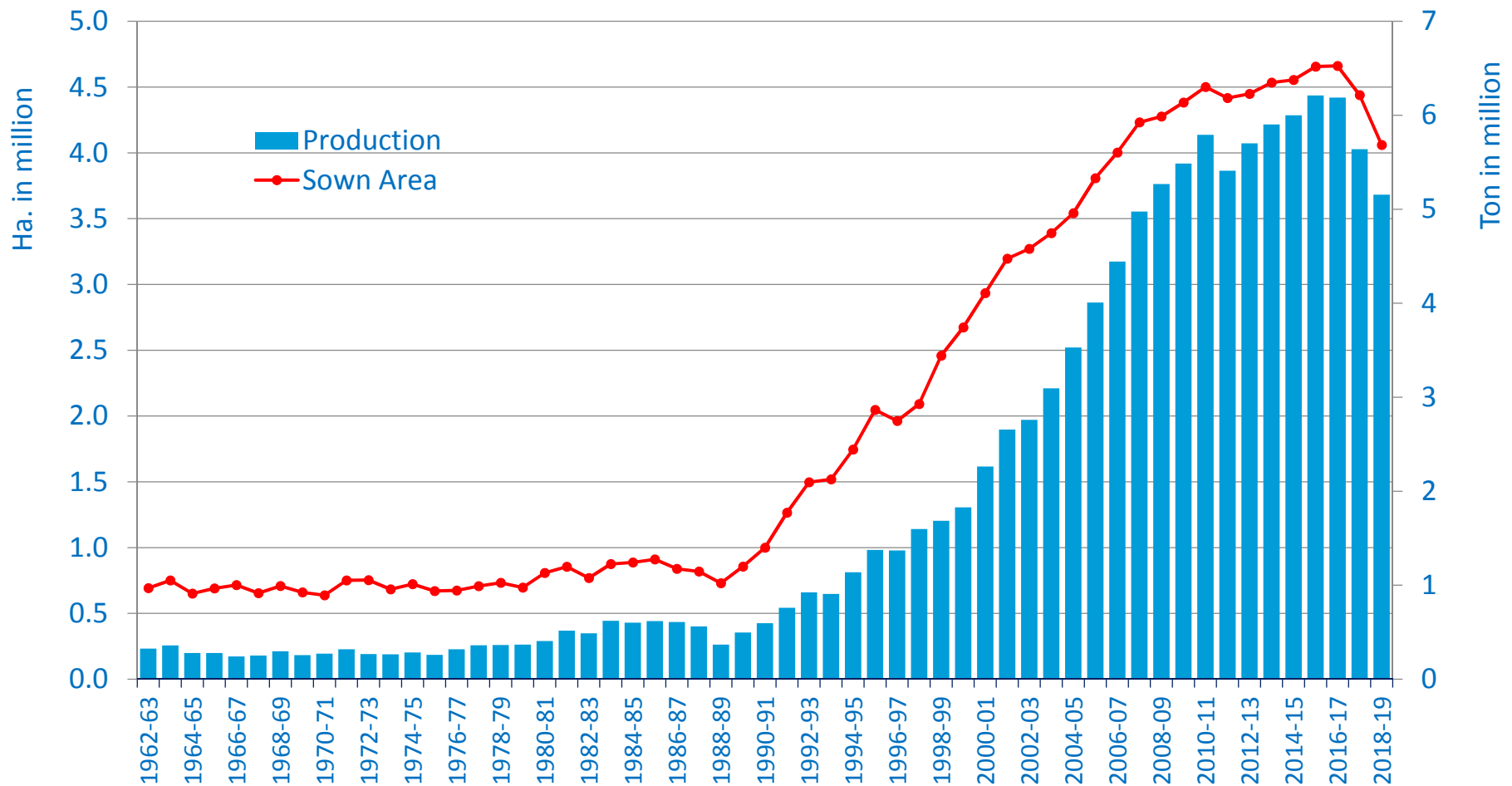
Myanmar Pulses and Beans

1. Black Gram
2. Green Gram
3. Butter Bean
4. Bocate
5. Sultani
6. Sultapya
7. Soybean
8. Chick Pea
9. Pelun
10. Pigeon Pea
11. Peyin
12. Pebyugalay
13. Pegyi
14. Pegya
15. Garden Pea
16. Peyazar
17. Penauk
18. **Others (nes)**



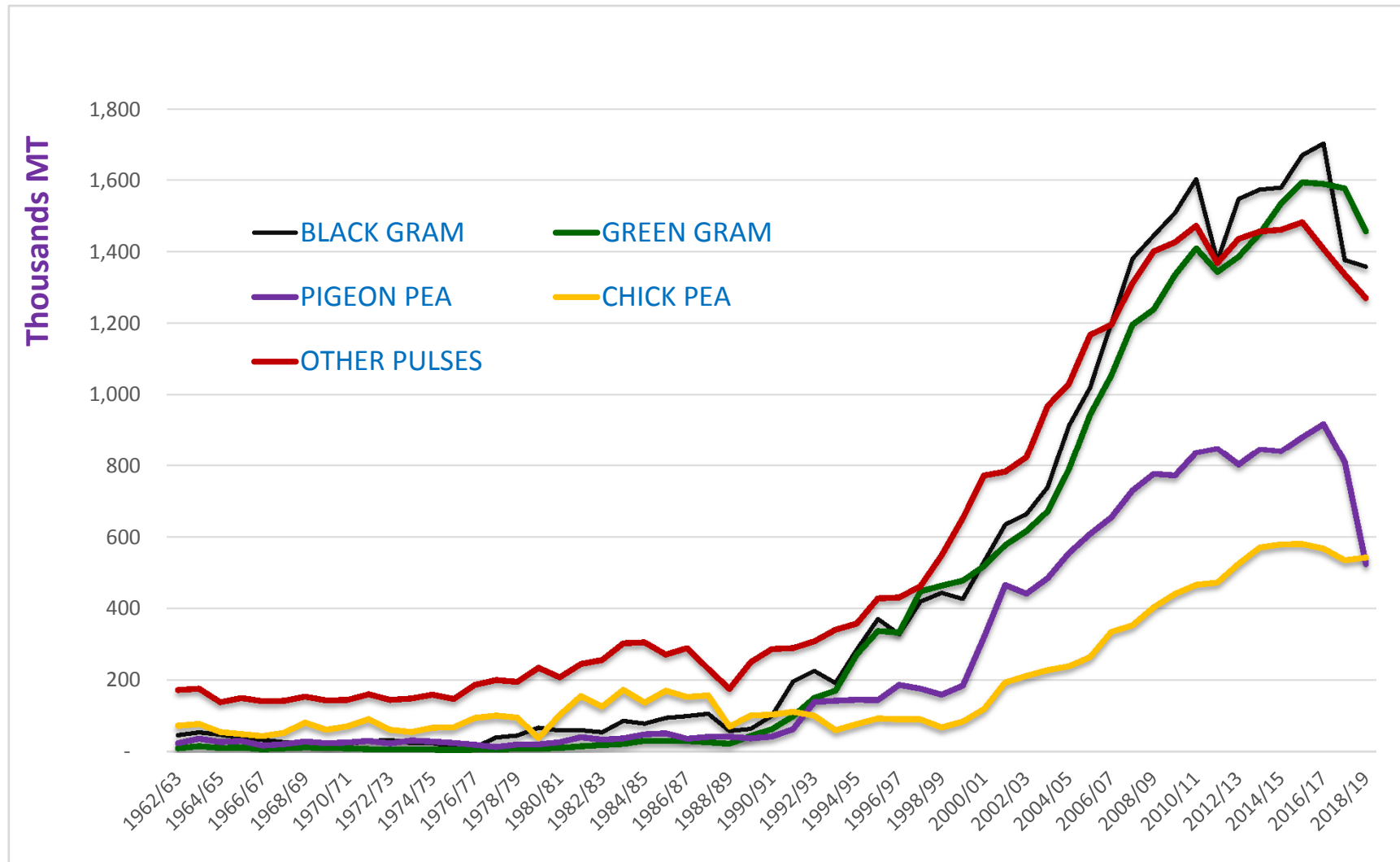
Myanmar Pulses & Beans Production

Year	Sown (mil. ha)	Yield (MT/ha)	Production (mil. MT)
2014-15	4.55	1.32	5.99
2015-16	4.66	1.33	6.21
2016-17	4.66	1.33	6.19
2017-18	4.44	1.27	5.64
2018-19	4.06	1.30	5.16



Source: Ministry of Agriculture, Livestock and Irrigation

Production Trend



Source: Ministry of Agriculture, Livestock and Irrigation

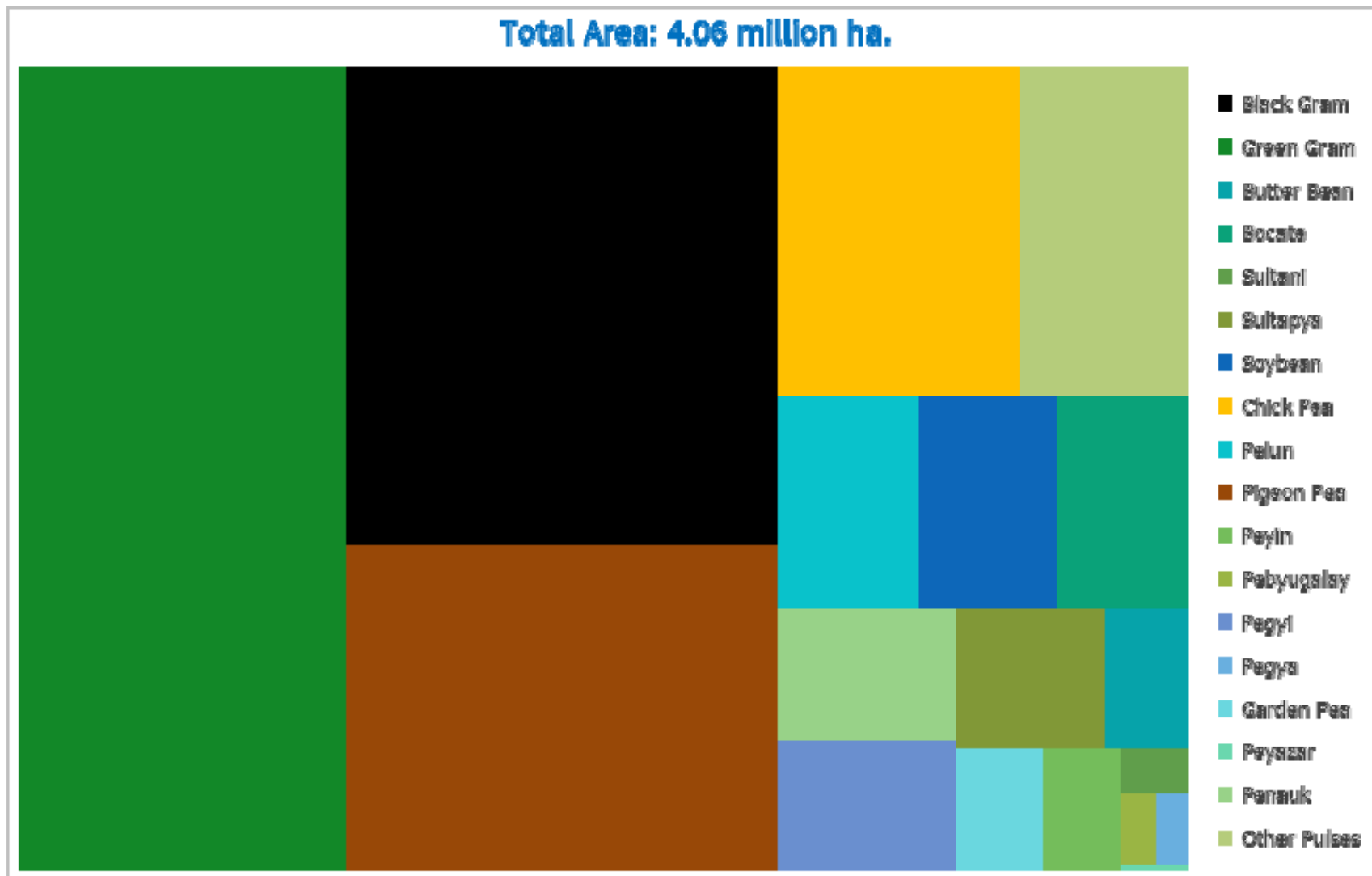
Production by Variety (2018-19)

SN	Pulses & Beans	Sown Area (000' ha.)	Harvested Area (000' ha.)	Yield (MT/ha.)	Production (000' MT)
1	Black Gram	947	946	1.44	1,359
2	Green Gram	1,169	1165	1.25	1,458
3	Butter Bean	63	63	1.19	75
4	Bocate	126	126	1.28	161
5	Sultani	12	12	1.16	14
6	Sultapya	105	105	1.25	131
7	Soybean	139	139	1.51	210
8	Chick Pea	383	383	1.42	543
9	Pelun	124	124	1.30	162
10	Pigeon Pea	445	444	1.18	525
11	Peyin	42	42	1.05	44
12	Pebyugalay	13	13	1.09	14
13	Peygi	99	99	1.19	118
14	Pegya	11	11	1.07	12
15	Garden Pea	46	46	1.30	60
16	Peyazar	1	1	0.96	1
17	Penauk	79	79	0.88	69
18	Other Pulses	258	258	1.16	299
	TOTAL:	4,061	4,057	1.30	5,254

Source: Ministry of Agriculture, Livestock and Irrigation

Sown Area by Variety

Rainy season = 31 %
 Winter season = 69 %



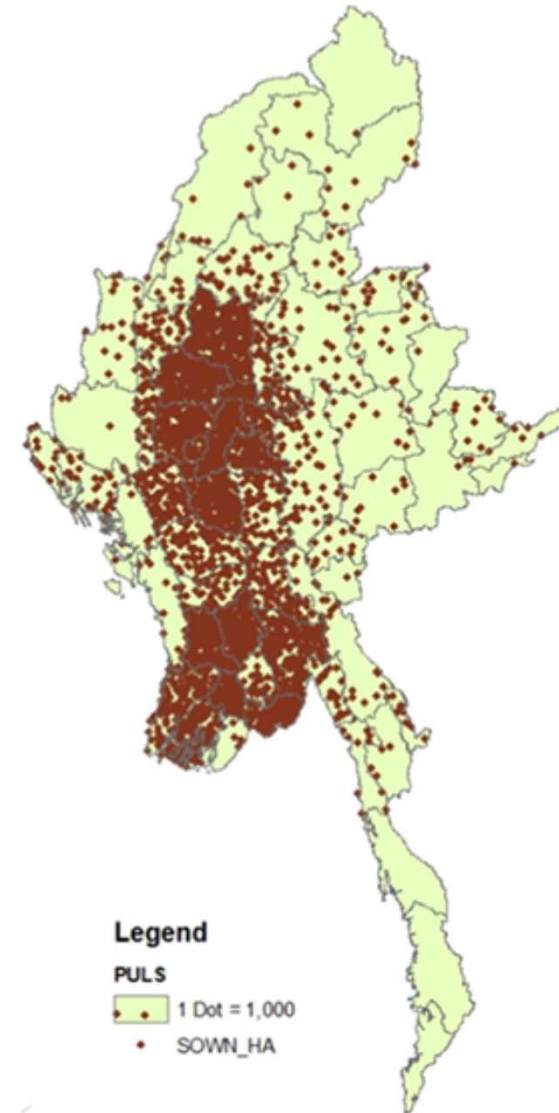
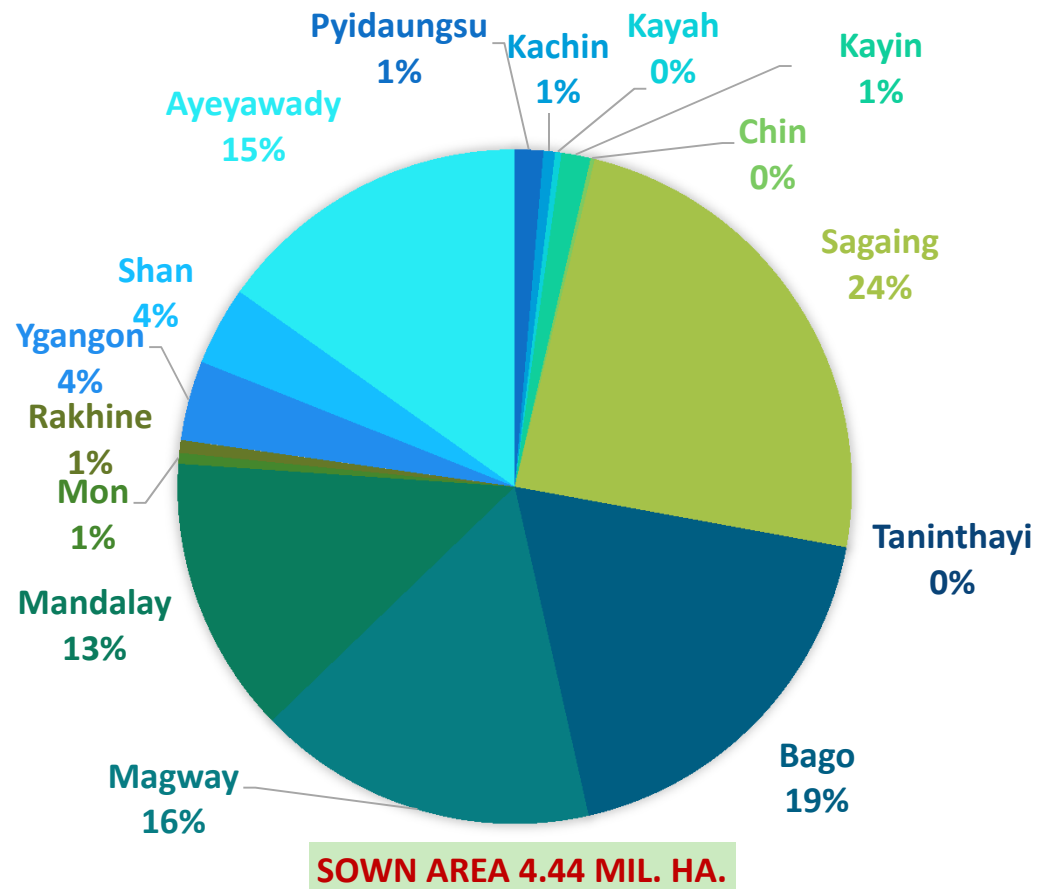
Source: Ministry of Agriculture, Livestock and Irrigation

Production by Region (2017-18)

SN	Region and State	Sown Area (000' ha.)	Harvested Area (000' ha.)	Yield (MT/ha.)	Production (000' MT)
1	Union Territory	60	60	1.20	73
2	Kachin	25	25	1.31	32
3	Kayah	13	13	0.93	12
4	Kayin	62	62	1.26	78
5	Chin	9	9	0.78	7
6	Sagaing	1,068	1,065	1.40	1,492
7	Taninthayi	0.4	0.4	0.72	0.3
8	Bago	825	825	1.52	1,252
9	Magway	724	723	1.11	799
10	Mandalay	590	590	0.99	581
11	Mon	23	23	1.26	29
12	Rakhine	27	27	1.10	30
13	Ygargon	170	170	1.12	190
14	Shan	168	168	1.25	209
15	Ayeyawady	674	674	1.27	855
	UNION	4,439	4,434	1.27	5,639

Source: Ministry of Agriculture, Livestock and Irrigation

Pulses Area Distribution



Source: Ministry of Agriculture, Livestock and Irrigation

Pulses Consumption

- Per capita consumption: 6.5 Pyi* (10 – 13 Kg)
- Avg. monthly expenditure for pulses: 2,936 Kyats (1.75% of total expenditure)
- Mandalay Region is the biggest consuming region (CSO 2012)



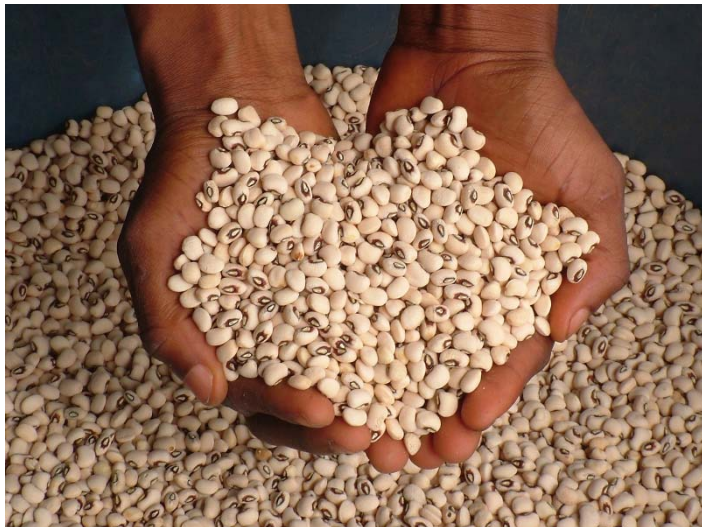
* 1 Pyi = 1/16 of a Basket (9 imperial gal. or 1 1/8 bushels)

Pulses Processing

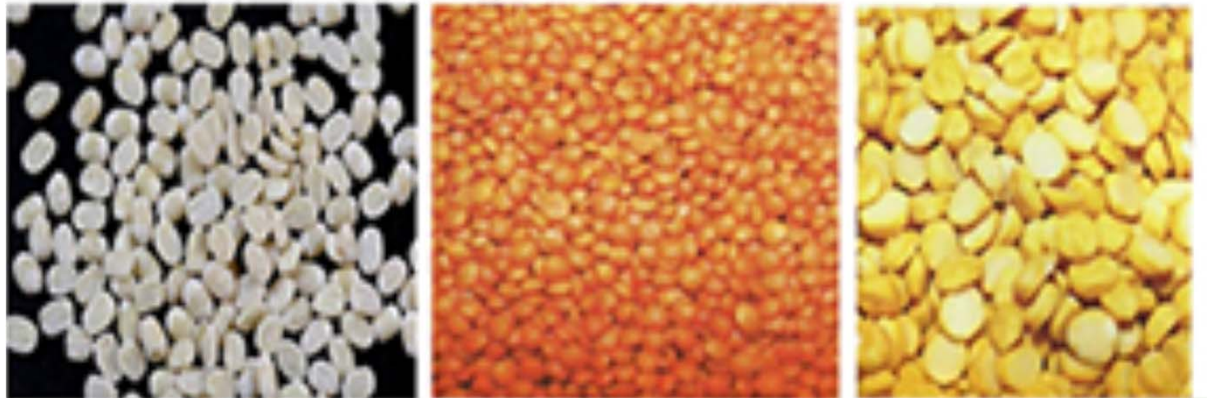
- Cleaning
- Grading
- Sorting
- Polishing
- Splitting (with skin, without skin)
- Food processing (Roasted, fried, flour, pasta, vermicelli, soup, canning, vege. meat, etc.)
- Oil extraction (soybean)
- Sprouting
- Animal feed



Pulses Products



Value-Added Products

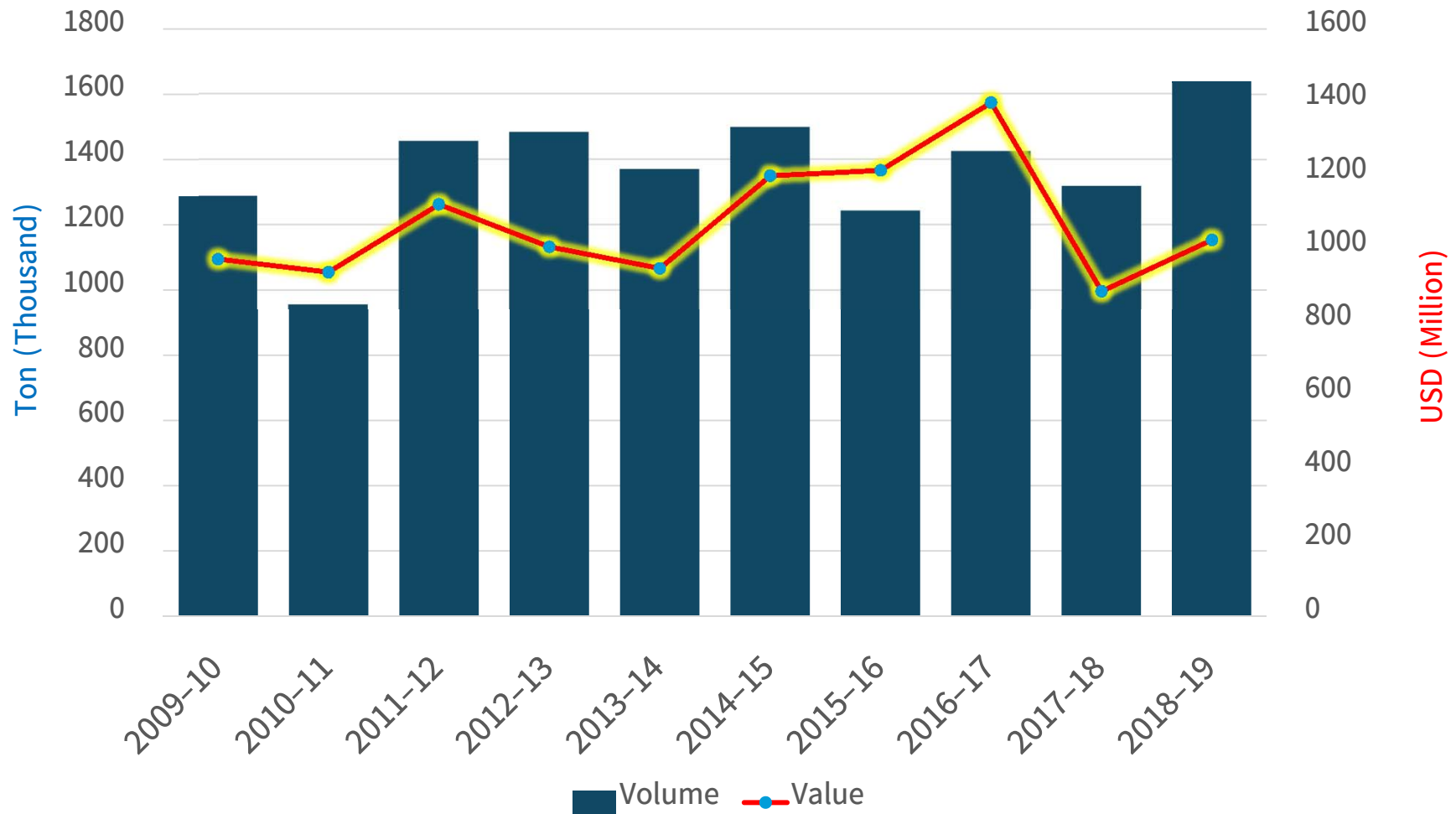


Whole/ Split
With husk/ without husk
Grit
Powder (Roasted/ raw)
Paste
Mixture

Boiled
Fried
Canned
Cooked
Fermented

Sprout
Curd/ Tofu
Snack
Vermicelli
Pasta
Meat/Fish imitation
Milk

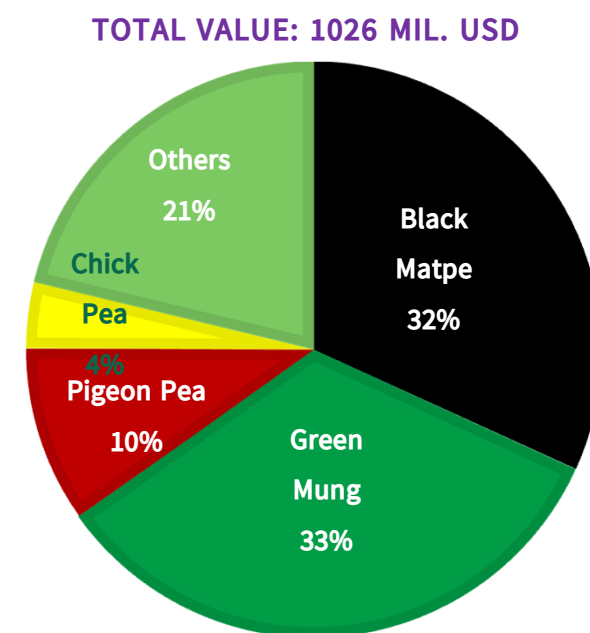
Myanmar Pulses Export



Source: Ministry of Commerce

Myanmar Pulses Export (2018-19)

Pulses	Value (mil. USD)	Quantity (000' MT)	Avg. Price (USD/MT)
Green gram	343	473,822	724
Black gram	326	616,073	530
Pigeon pea	101	182,169	556
Groundnut	86	70,654	1223
Chick pea	38	76,777	496
Cowpea	29	55,494	522
Butter bean	23	30,143	774
Other pulses	20	35,725	571
Kidney bean	20	27,463	726
Rice bean	13	24,093	529
Bocate	7	13,307	531
Sultani/pya	5	8,460	599
Lablab bean	5	7,773	646
Penigyar	5	10,288	480
Soybean	3	6,386	429
Nylon	1	1,434	840
Total:	1,026	1,640,060	626



Source: Ministry of Commerce

Myanmar Pulses Export

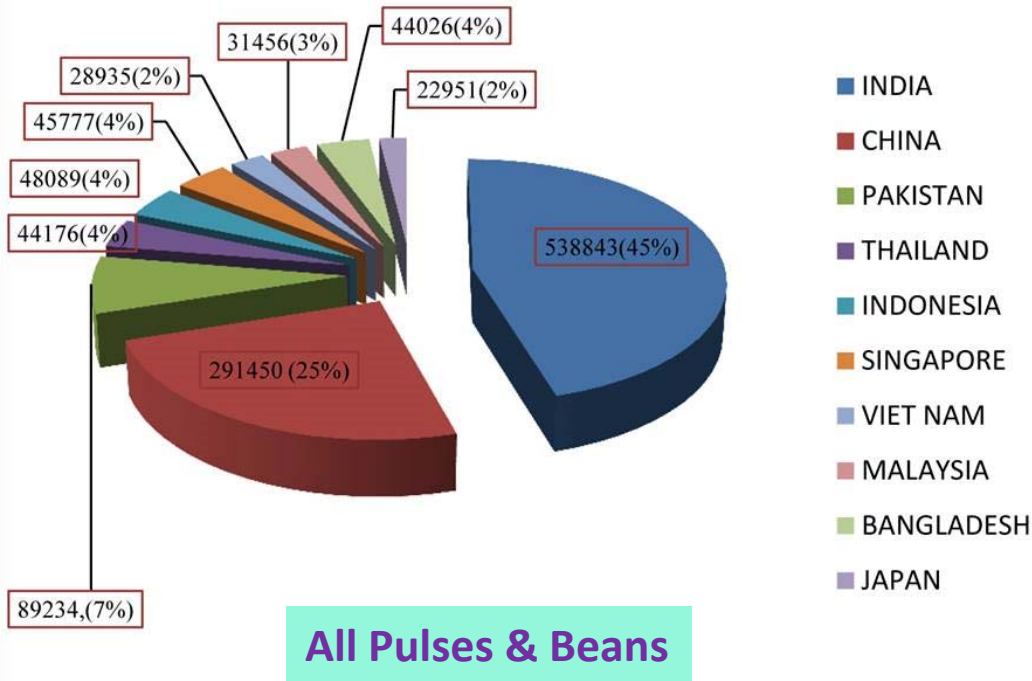
Quantity (000' MT)	Year	Black gram	Green gram	Pigeon pea	Chick pea	Others	Total
	2014-15	626	355	308	209	626	1,498
	2015-16	483	331	227	202	483	1,243
	2016-17	562	407	185	271	562	1,424
	2017-18	528	350	225	44	214	1,318
	2018-19	616	474	182	77	291	1,640

Value (Mil USD)	Year	Black gram	Green gram	Pigeon pea	Chick pea	Others	Total
	2014-15	470	360	208	9	153	1,200
	2015-16	498	333	230	20	134	1,215
	2016-17	672	349	160	29	189	1,399
	2017-18	344	271	100	36	136	887
	2018-19	326	343	101	38	218	1,026

Source: Ministry of Commerce

Export by Country

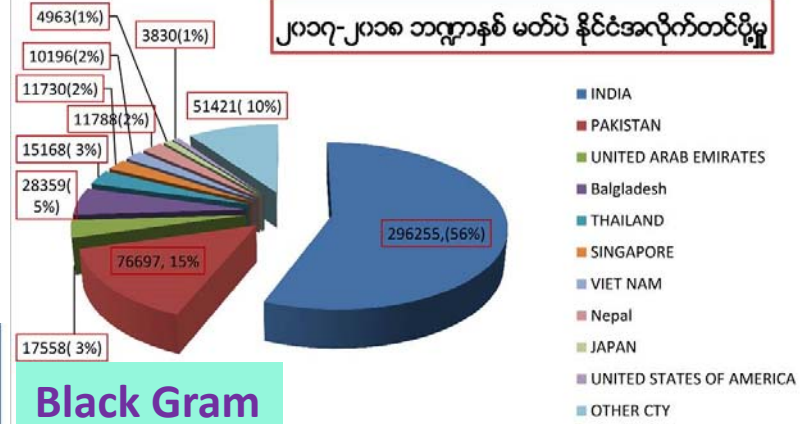
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All Pulses & Beans

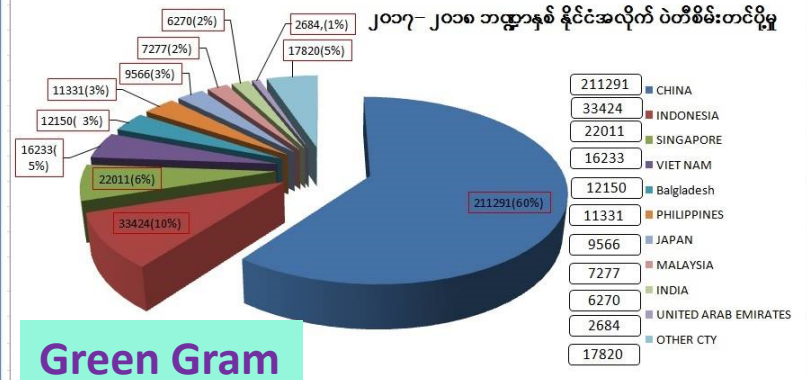
Source: Ministry of Commerce

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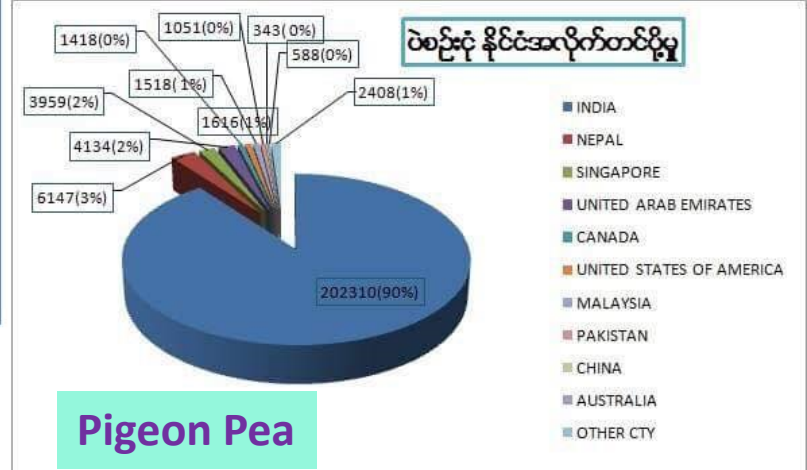
Black Gram

၂၀၁၇-၂၀၁၈ ဘဏ္ဍာနှစ် နိုင်ငံအလိုက် ပဲတိမ်မီးတင်ပို့မှု



Green Gram

ပဲစဉ်း နိုင်ငံအလိုက်တင်ပို့မှု



Pigeon Pea

Specification (Black gram)

	Particular		FAQ	FQ	SQ
(a)	Foreign Matters	Max	1.00%	1.00%	1.00%
(b)	Weevilled Seeds	Max	1.50%	1.00%	0.50%
(c)	Damaged Otherwise	Max	4.00%	2.50%	2.00%
(d)	Brown Seeds	Max	3.00%	3.00%	2.50%
(e)	Sister Beans	Max	3.00%	3.00%	-
(f)	Big Seeds	Max	5.00%	15.00%	-
(g)	Small Seeds	Max	6.00%	6.00%	6.00%
(h)	Moisture Content	Max	14.00%	14.00%	14.00%

FAQ = Fair Average Quality; FQ = First Quality; SQ = Special Quality

(Retained on slotted sieve 3.25 mm)

(Passing through slotted sieve 2.25/ 2.75/ 3.25 mm for FAQ/FQ/SQ, respectively)

Recent Development

- **GAP** (Good Agricultural Practices) Protocol for Green gram, Black gram and Cowpea
- Pulses **Specification** of “MMS CODEX STAN 171 :1989” (for selected pulses)
- Food **Value Chain Road Map** (2016-2020) including Pulses drafted with the help of MAFF, Japan
- Pulses **Sector Development Strategy** with the assistance of ACIAR
- Special **Task Force** for cooperation and coordination of pulses export
- **Sprouting bean** (green gram) export to EU market
- etc.



Challenges & Opportunities

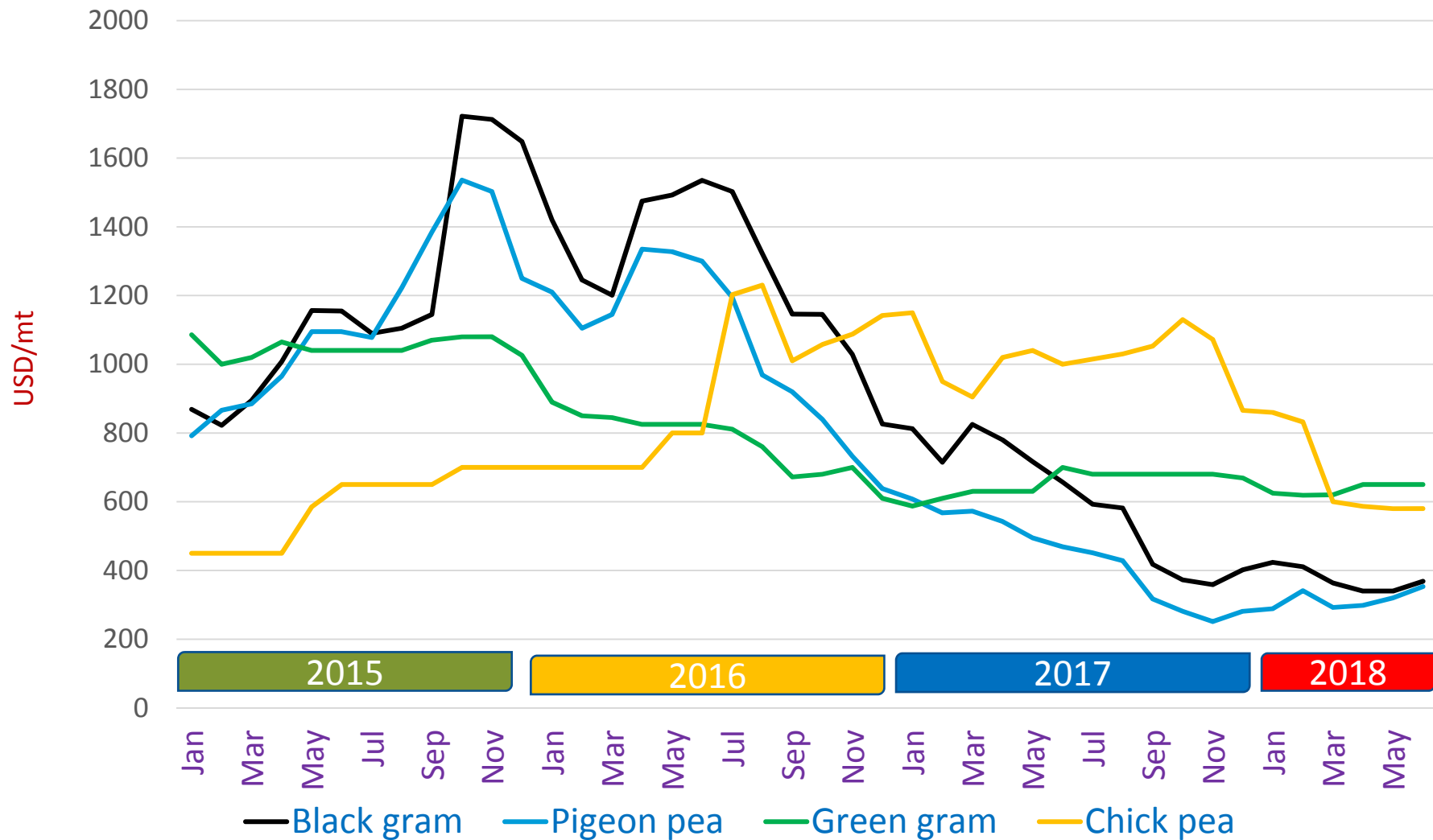
- Dependency on single market/ Market diversification
- Low market price, price volatility
- Value-added production
- High cost of production
- Low productivity
- Low local consumption
- Modernization of storage and processing sector
- Commodity market
- Response by farmers

Current Status (Export in Ton)

Pulses	2018-19 FY	2019 (Jan. to 28-12-19)		
	Quantity (000' MT)	Until Last Week	Within This Week	Total
Black gram	616,073	456,202	4291	460,493
Green gram	473,822	220,056	2936	222,992
Pigeon pea	182,169	170,839	528	171,367
Chick pea	76,777	52,447	168	52,615
Cow pea	55,494	37,820	265	38,085
Kidney bean	27,463	117,606	21	117,627

Source: MOC (Commerce Journal)

Price (FOB. Yangon, 2015-2018)



Source: MOC

Re-Orientation



- Discussion with India
- Procurement by revolving fund
- Shifting from growing black gram and pigeon pea to other pulses or other crops such as: groundnut, sesame, maize, summer rice, sugarcane.
- Improvement of local pulses & beans consumption
- Value-added products production
- Food safety drive
- Finding new international markets
- Modernization of trading system and trade services
- Information sharing
- Pulses Development Forum --- etc.

Myanmar Sesame Seeds

Year	Sown Area (000 ha)	Yield (MT/ha)	Production (000 MT)	Export	
				(000 MT)	(million USD)
2014-15	1,581	0.59	930	91	182.0
2015-16	1,640	0.59	943	97	130.9
2016-17	1,636	0.58	927	109	146.8
2017-18	1,590	0.54	829	121	147.1
2018-19	1,547	0.49	727	117	193.6



Myanmar Maize

Year	Sown Area (000 ha)	Yield (MT/ha)	Production (000 MT)	Export	
				(000 MT)	(million USD)
2014-15	459	3.75	1,721	1,360	394.5
2015-16	472	3.78	1,777	1,188	305.1
2016-17	490	3.81	1,860	1,295	253.1
2017-18	504	3.88	1,940	1,437	294.5
2018-19	520	3.88	2,016	1,531	277.1



Business Opportunities

Productivity

- Quality seeds
- Agricultural inputs (fertilizer/ pesticide/ etc.)
- Farm mechanization
- Irrigation
- Technology (GAP, Post-harvest, Food processing, etc.)

Food Safety

- Good Agricultural Practices (GAP)
- Sanitary and Phyto Sanitary (SPS) measures
- Traceability
- Law enforcement

Market

- Market information
- Processing & value-addition
- Labelling, Packaging
- Information and Statistics

Myanmar Pulses, Beans & Sesame Seeds Merchants Association

- Founded on 29, Jun. 1992
- > 500 Members
- 2019-2021 (3 Year Term)
- Chairman, 5 Vice-Chairman
- Secretary, 3 Joint Secretary
- Information Server, Treasure, Joint-Treasure, Auditor, Joint Auditor
- 39 CEC and 33 EC
- Memorandum and Articles of Association
- Member of the “Global Pulse Confederation”



Objectives

- a) **Supply-Chain** development
- b) Support of trade **policies** laid down by the Ministry of Commerce
- c) Fulfillment of **economic objectives** of the state through the sector development
- d) Enhancement of **productivity** and business to be in the hands of the **nationals**
- e) **Quality** improvement and standing as a major global exporter
- f) Increased **production** by efficient use of modern technology, seeds, inputs and machineries
- g) Improved living standard of the **growers**
- h) Development of modern **trading** systems
- i) Better **services** in R&D, information, extension and others
- j) **Guidance** of association members
- k) **Cooperation** with governmental departments
- l) **Bridging** between the State and stakeholders
- m) Establishment of buildings, lands, and other **utilities**
- n) Commercial **arbitration**

More Information

Website:

www.mpbsma.org

(Facebook: [Mpbsma Myanmar](#))

www.commerce.gov.mm

www.myanmartrade.org

Various Company Websites

Publications:

Four Pulses Value Chain (2014)

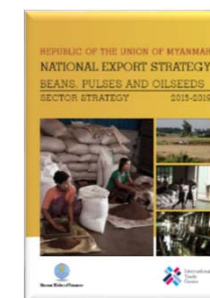
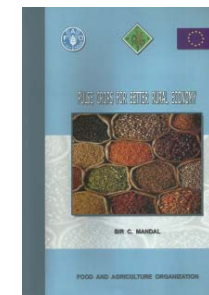
National Export Strategy (2013)

Pulse Crops for Better Rural Economy (2010)

Pulses Training Manual (2003)

A Food Legume Improvement Program (1978)

etc.



Contact

Myanmar Pulses, Beans & Sesame Seeds Merchants Association

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Thank You