



FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

Myanmar Agricultural Performance Survey (August/September '22)



December 7, 2022

Bart Minten, program leader Myanmar Agricultural Policy Support Activity, IFPRI

Photo credit: Kobby Dagan/Shutterstock



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

**MICHIGAN STATE
UNIVERSITY**®



Livelihoods and Food Security Fund



managed by **UNOPS**



FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

DATA

- **Myanmar Household Welfare Survey (MHWS):**

1. Round 3 (R3): July 8th - August 10th
2. R3 - 12,128 observations

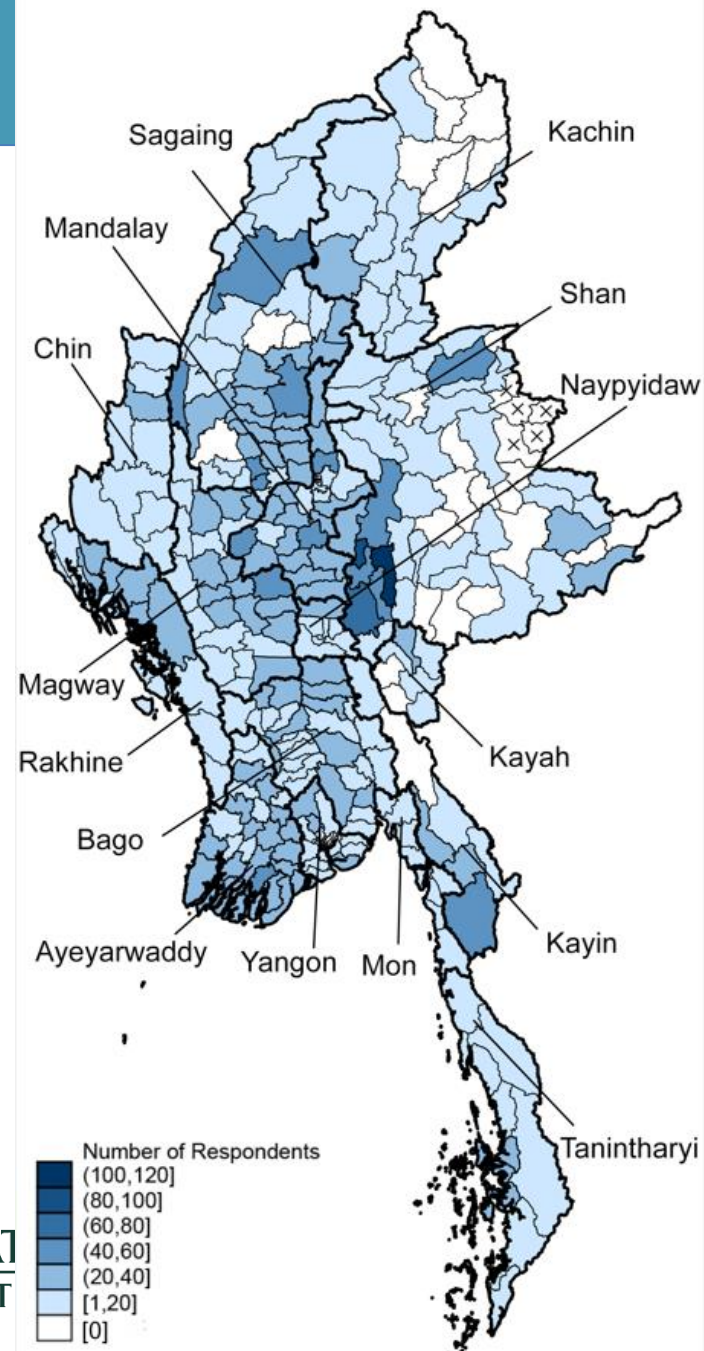
- **Myanmar Agricultural Performance Survey (MAPS):**

1. Round 2: August 22nd – September 15th
2. R2 - 5,021 crop farmers
3. Questions about agricultural performance in last 6 months and expectations next monsoon

Note: land cultivated post-/pre-monsoon less important than monsoon (less rice; more pulses/oilseeds)

Myanmar Agricultural Performance Survey R2

Number of respondents interviewed at township level



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE UNIVERSITY

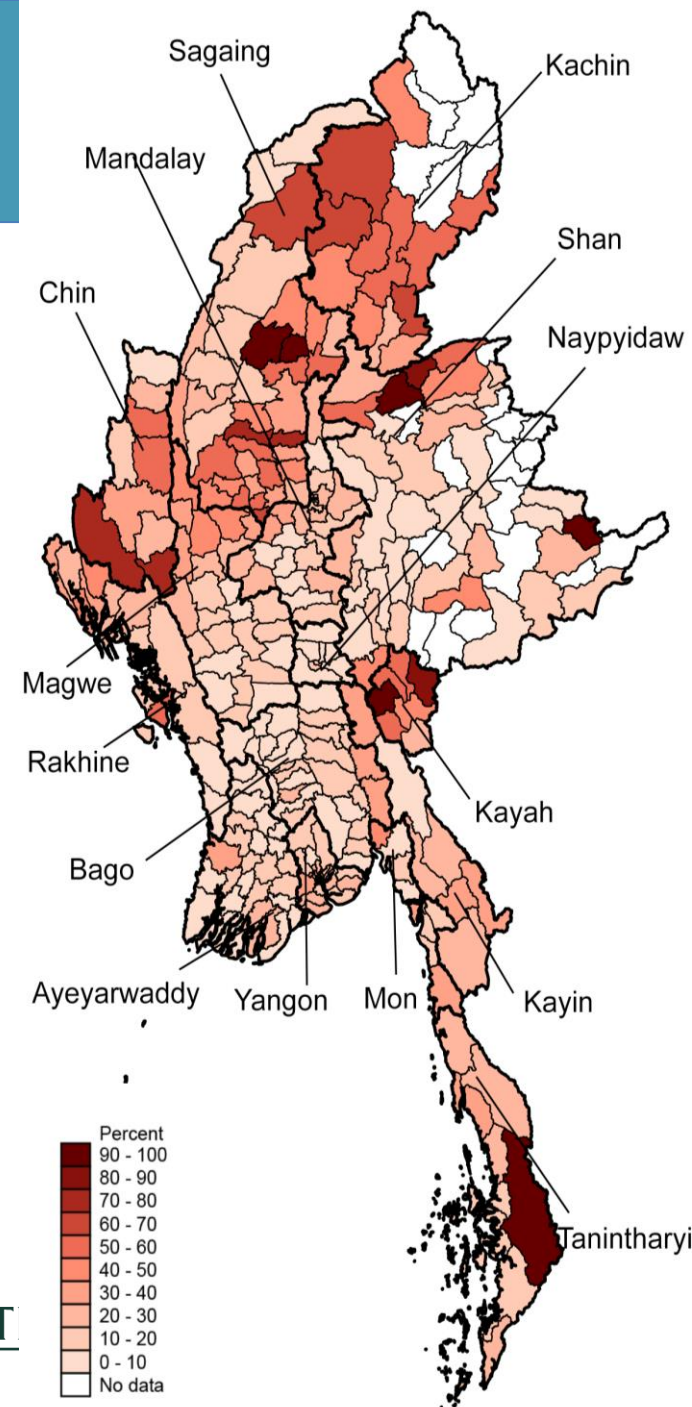


FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

INCREASING INSECURITY

- 22% of households in Myanmar felt that their community was “very” or “somewhat” insecure
- Important variation by state/region
- 28% (urban) and 20% (rural) have low level of trust in their communities
- Violence and crime against households on the rise, e.g. 3.3% impacted by theft or robbery (3 months before the survey)



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE UNIVERSITY



FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

AGRICULTURAL PERFORMANCE FEBRUARY – JULY 2022 (SUMMER SEASON) (POST- AND PRE-MONSOON)



MICHIGAN STATE
UNIVERSITY®



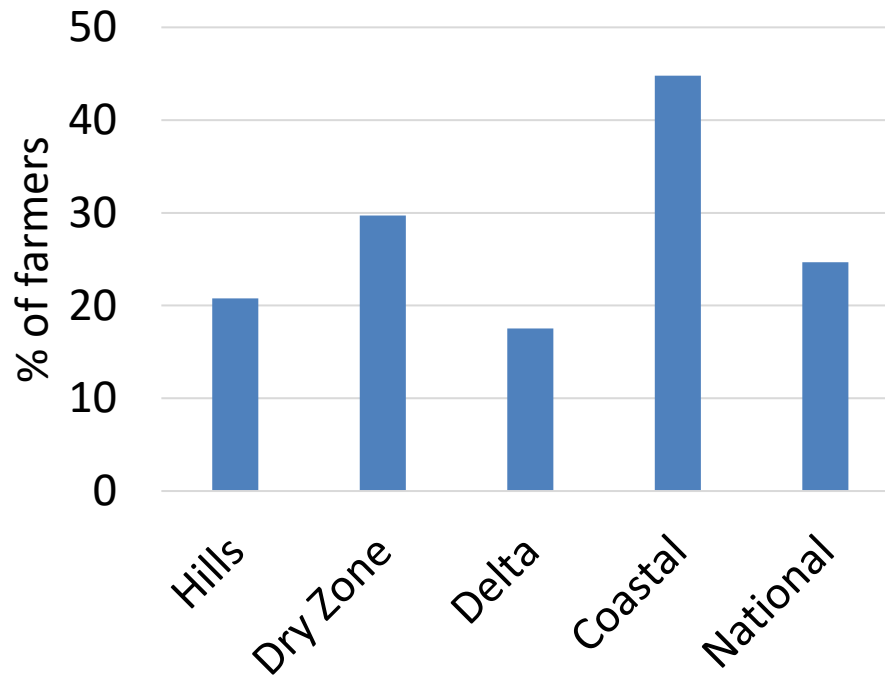


FEED THE FUTURE

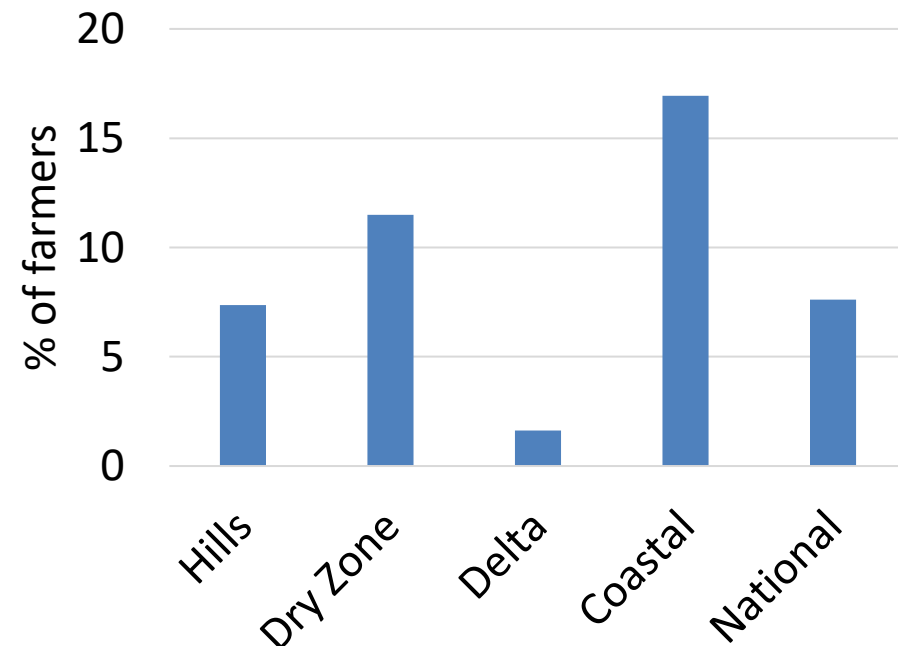
The U.S. Government's Global Hunger & Food Security Initiative

INSECURITY AND AGRICULTURE

"Cannot move around without serious concern for security"



"Fields were not cultivated because of conflict in my area"



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund

Canada



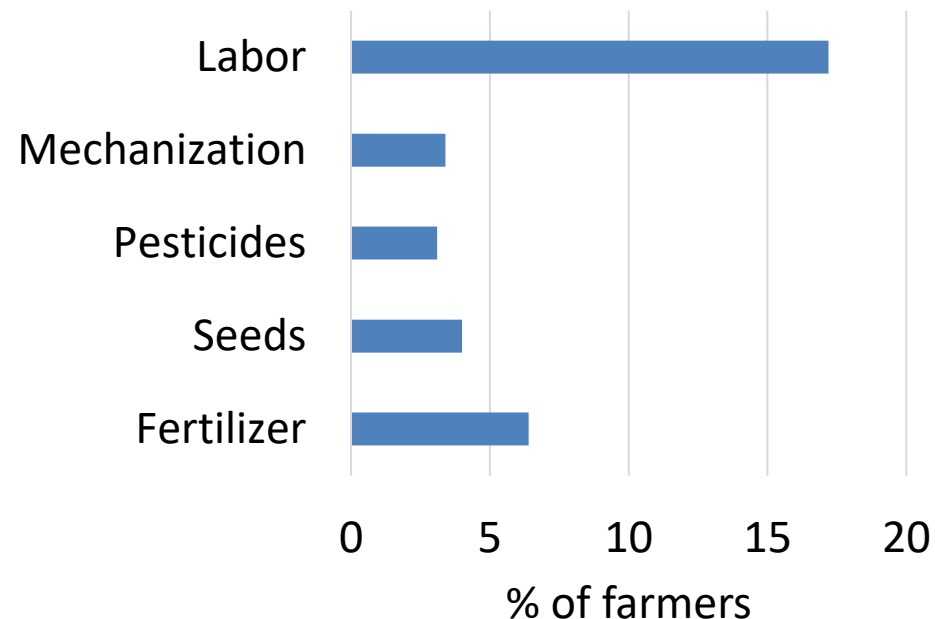
FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

AGRICULTURAL INPUTS MOSTLY AVAILABLE

- Most farmers had access to agricultural inputs
- For agro-chemicals, most problems with fertilizer (6% of farmers)
- Access to labor an increasing issue (possibly because of increasing migration)

Input not (enough) available



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



managed by **UNOPS**

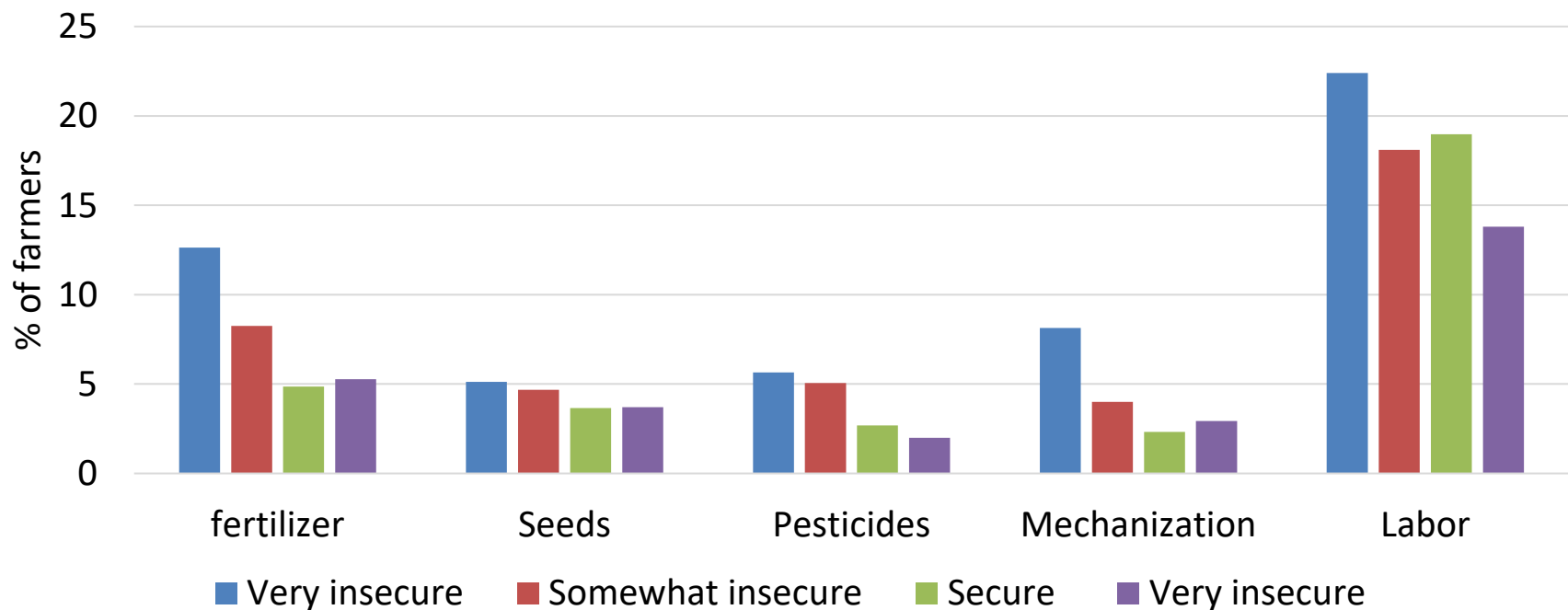


FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

MORE PROBLEMS AVAILABILITY IF INSECURE

Inputs not (enough) available



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund

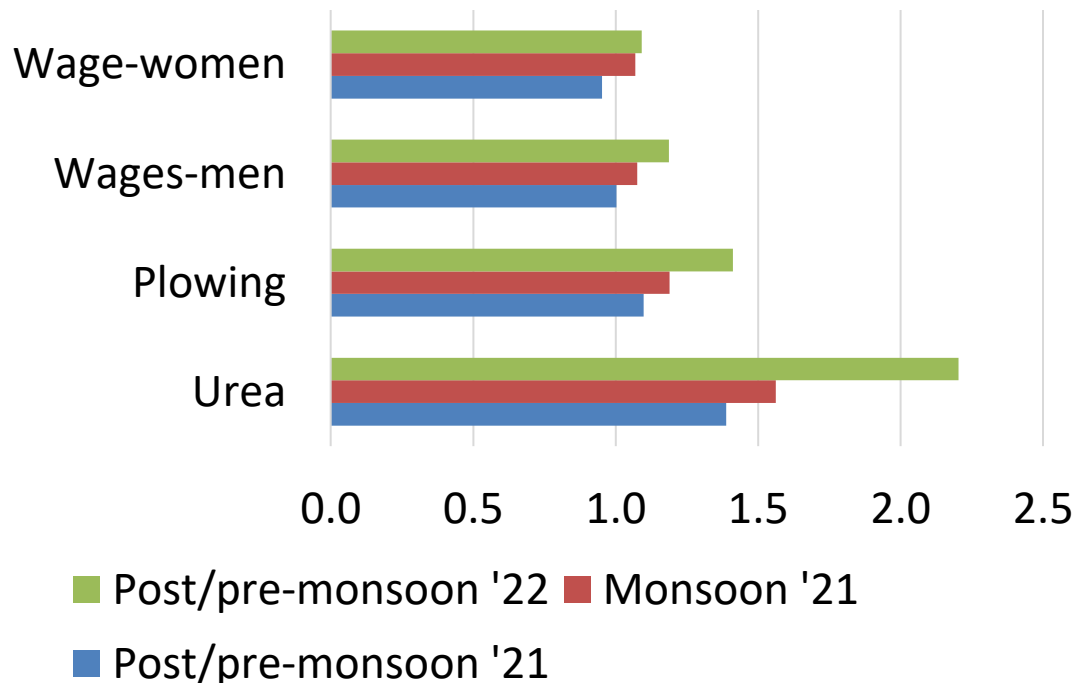
Canada **NEW ZEALAND** **Irish Aid** **USAID** **Norwegian Ministry of Foreign Affairs**

INPUT PRICES UP

Increases summer 2022
compared to year earlier:

- Wages – women: 15%
- Wages – men: 18%
- Plowing: 29%
- Urea: 59%

Costs (Monsoon 2020 = 1)



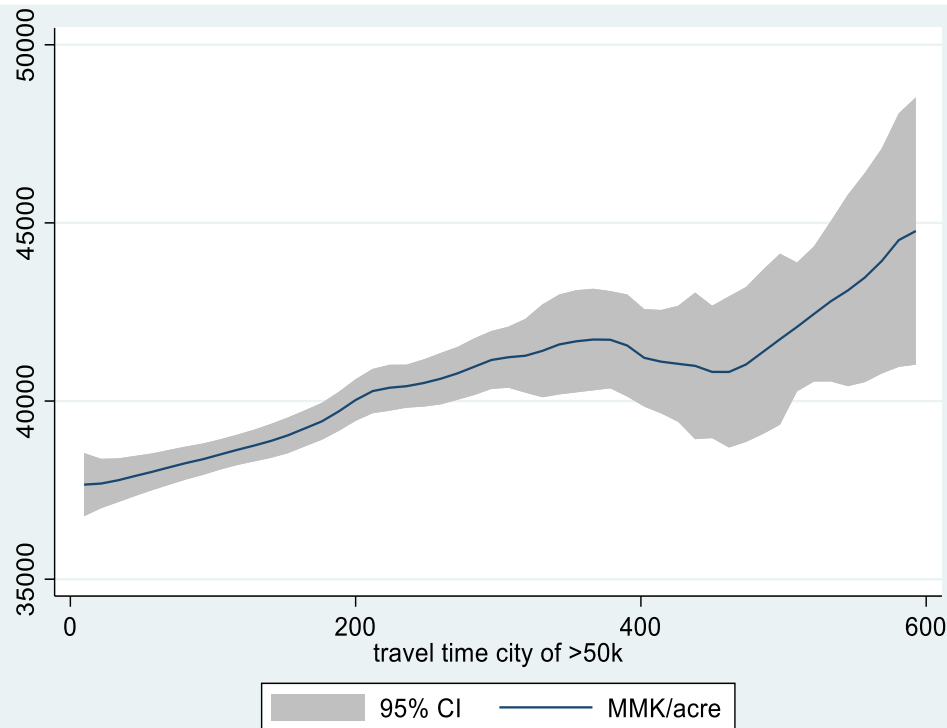


FEED THE FUTURE

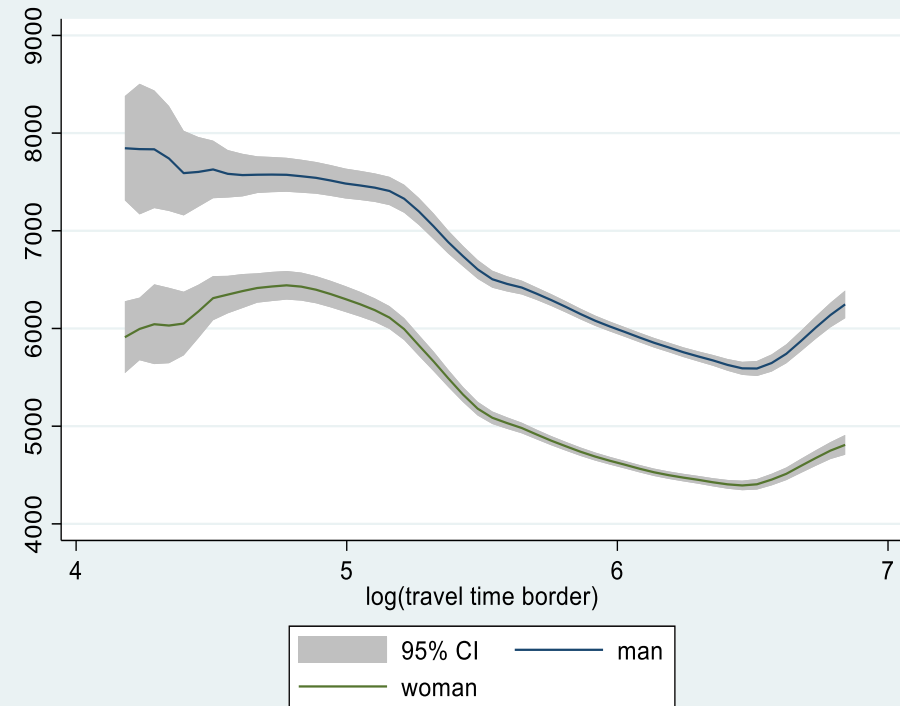
The U.S. Government's Global Hunger & Food Security Initiative

INPUT PRICES DEPEND ON WHERE YOU LIVE

Mechanization



Wages





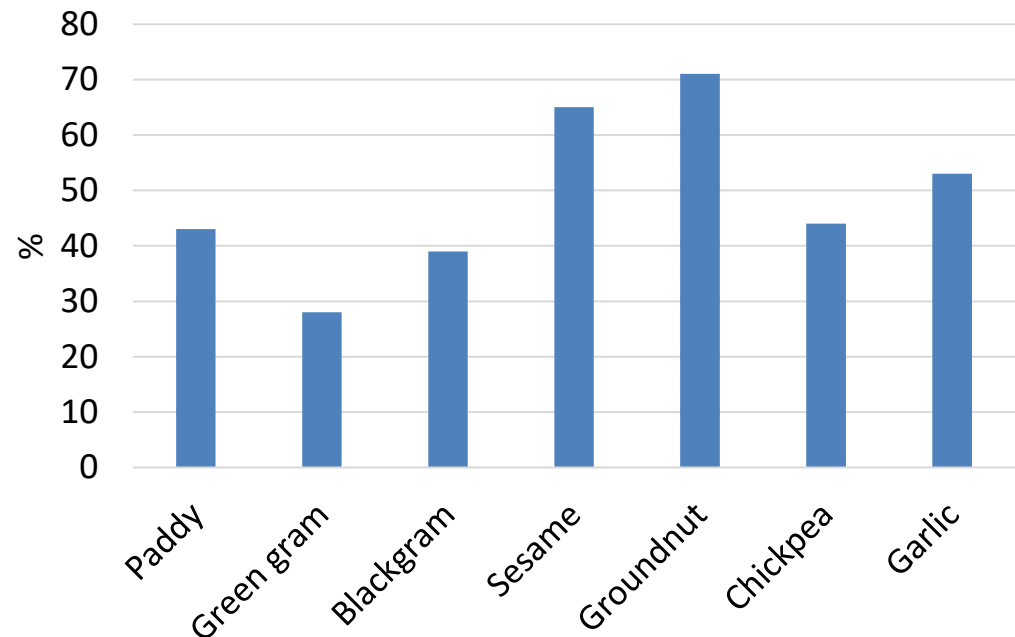
FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

FARMGATE PRICES ALSO UP

- Farm gate prices increasing at the national level
- Large price increases for sesame and groundnut (linked to reduction palm oil import; increasing demand for other vegetable oils)

Price increases farmers (09/22 versus 09/21)



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



managed by **UNOPS**

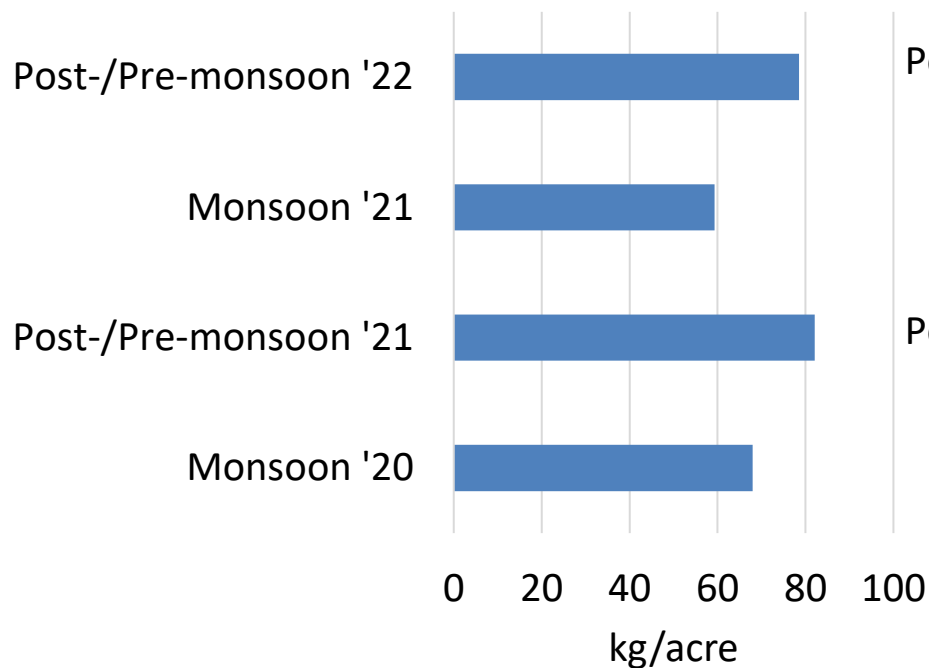


FEED THE FUTURE

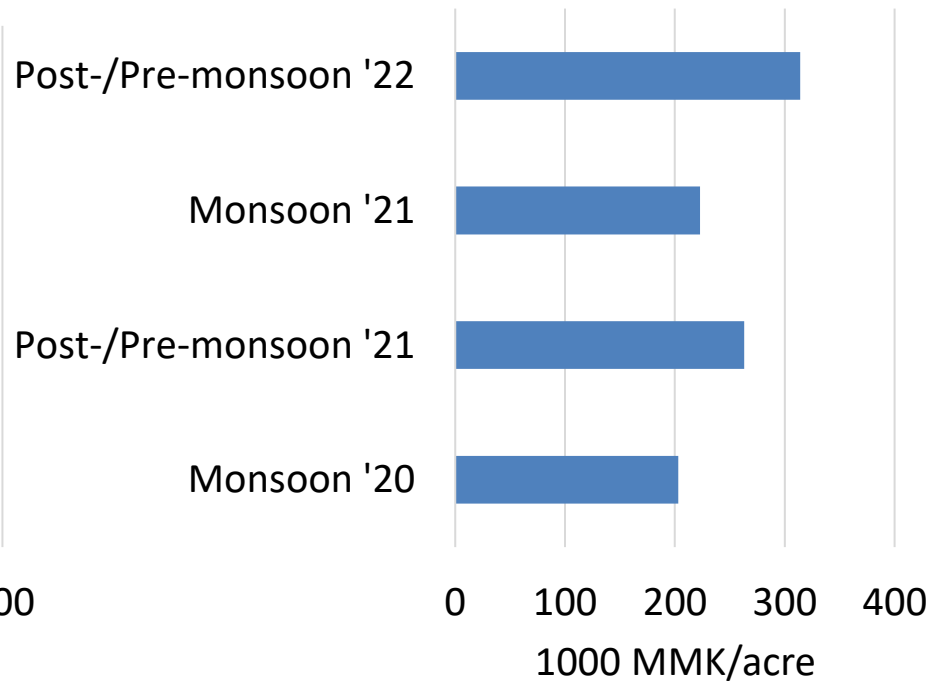
The U.S. Government's Global Hunger & Food Security Initiative

INPUT USE HOLDING UP

Fertilizer use on paddy



Agricultural input expenditures on paddy



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE UNIVERSITY



Livelihoods and Food Security Fund



managed by UNOPS



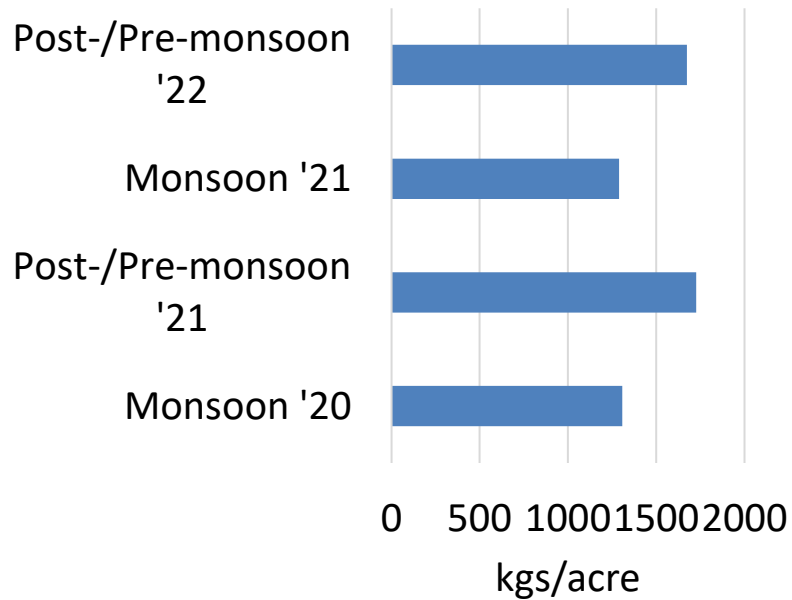
FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

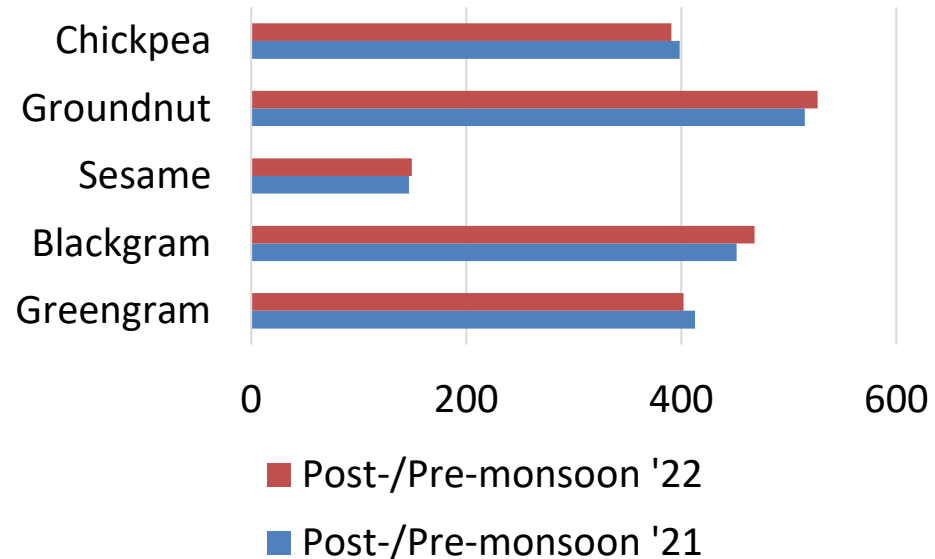
PRODUCTION RESILIENCE

Relatively small changes in yields, as well as cultivated area

Paddy yields - largest plot



Yields - largest plot



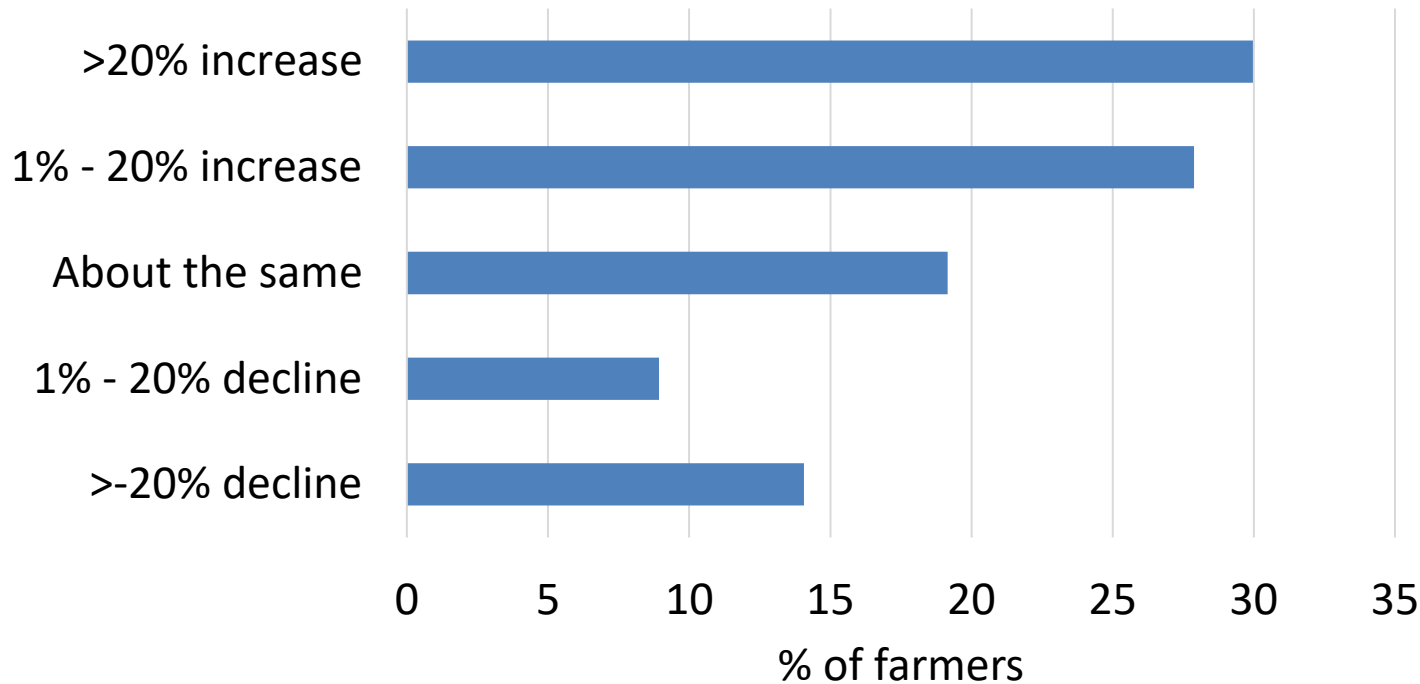


FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

SALES INCOMES UP FOR MOST

Sales income compared to last year



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



managed by UNOPS

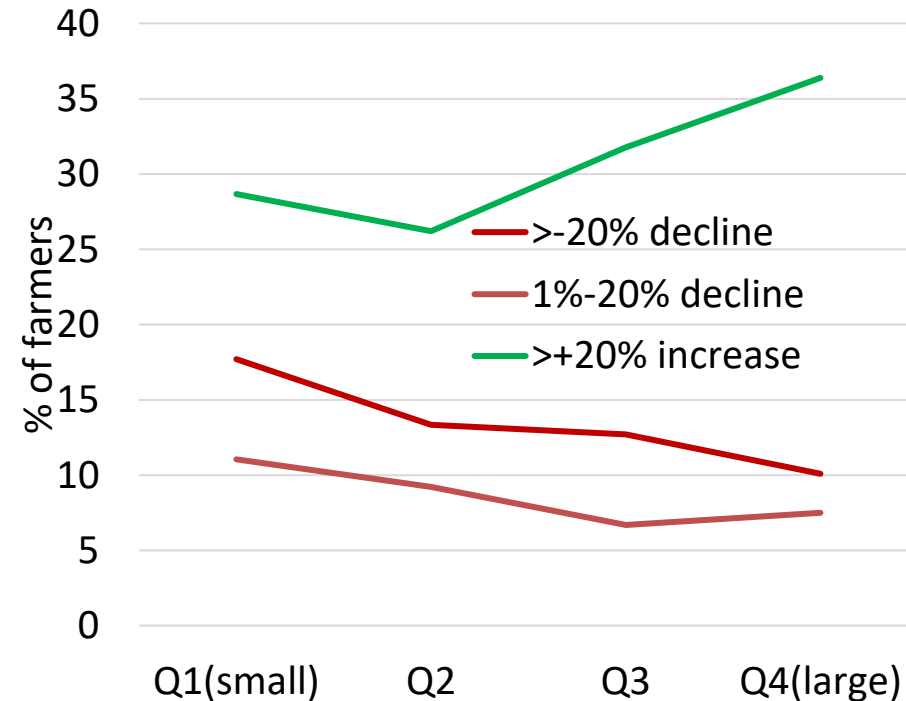
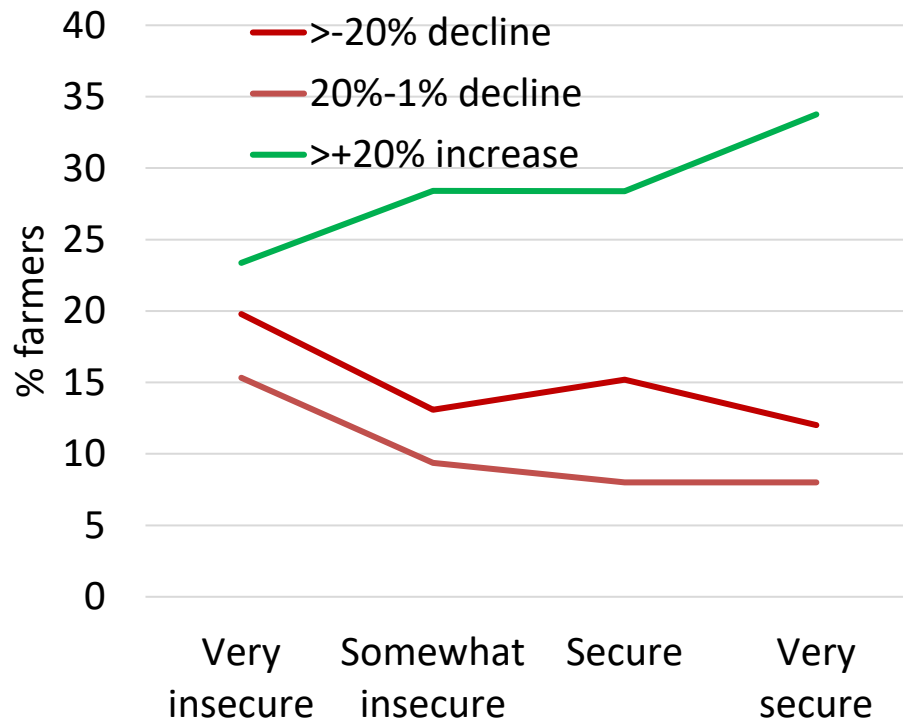


FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

... NOT FOR ALL HOUSEHOLDS THOUGH

Small farmers and insecure areas worse off



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

LOOKING FORWARD



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



managed by **UNOPS**

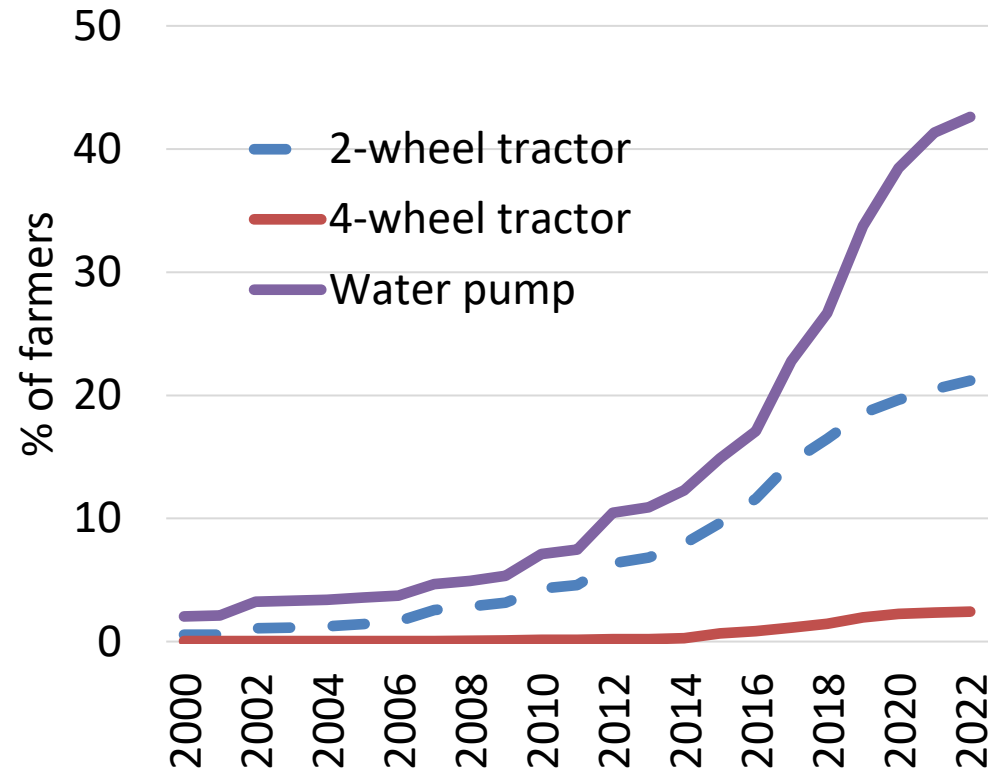


FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

SLOWING OF AG. INVESTMENTS

- Few capital investments happening by farmers since beginning of 2021.
- Of all machinery, acquisition in the last 1.5 years:
 - 3.2% of 2-wheel tractors
 - 3.8% of 4-wheel tractors
 - 3.0% of water pumps



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



managed by UNOPS

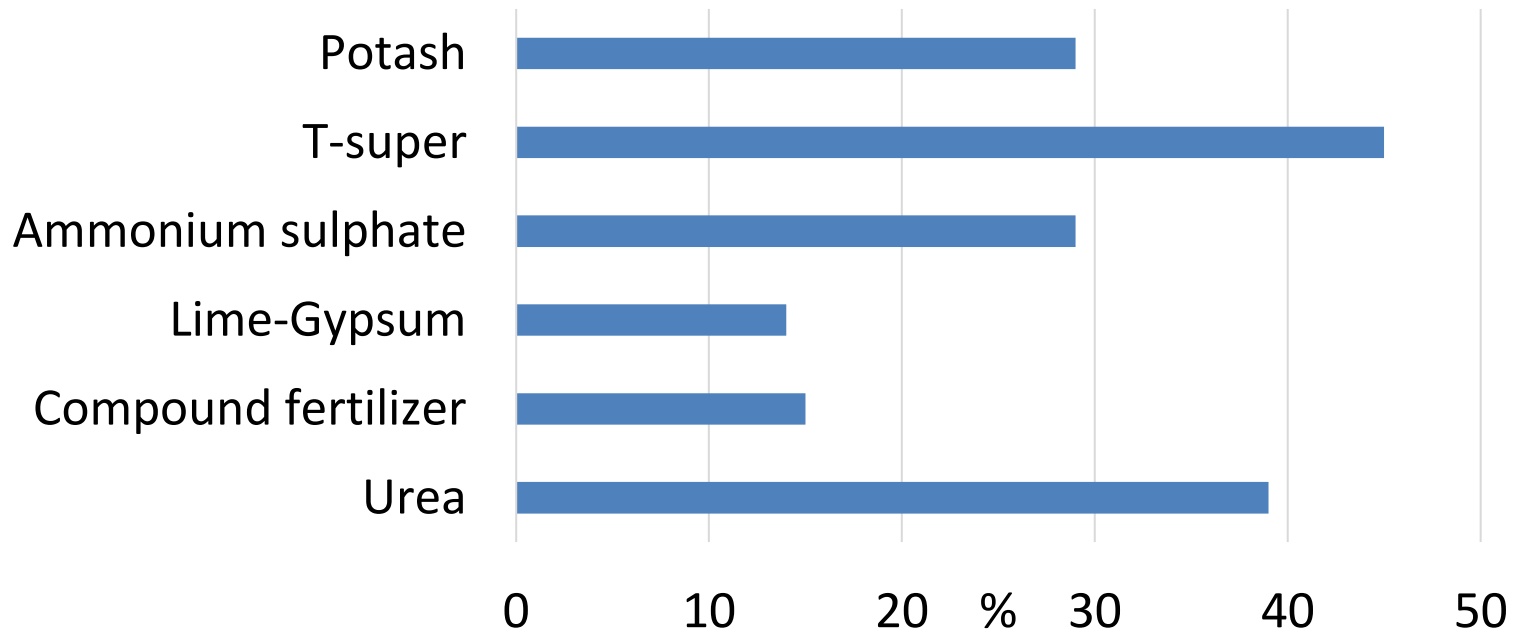


FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

JULY – INCREASED PRICES AND LOWER SALES FERTILIZER

Reduction sales agro-input retailers (July)



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

**MICHIGAN STATE
UNIVERSITY**®



Livelihoods and Food Security Fund



managed by **UNOPS**

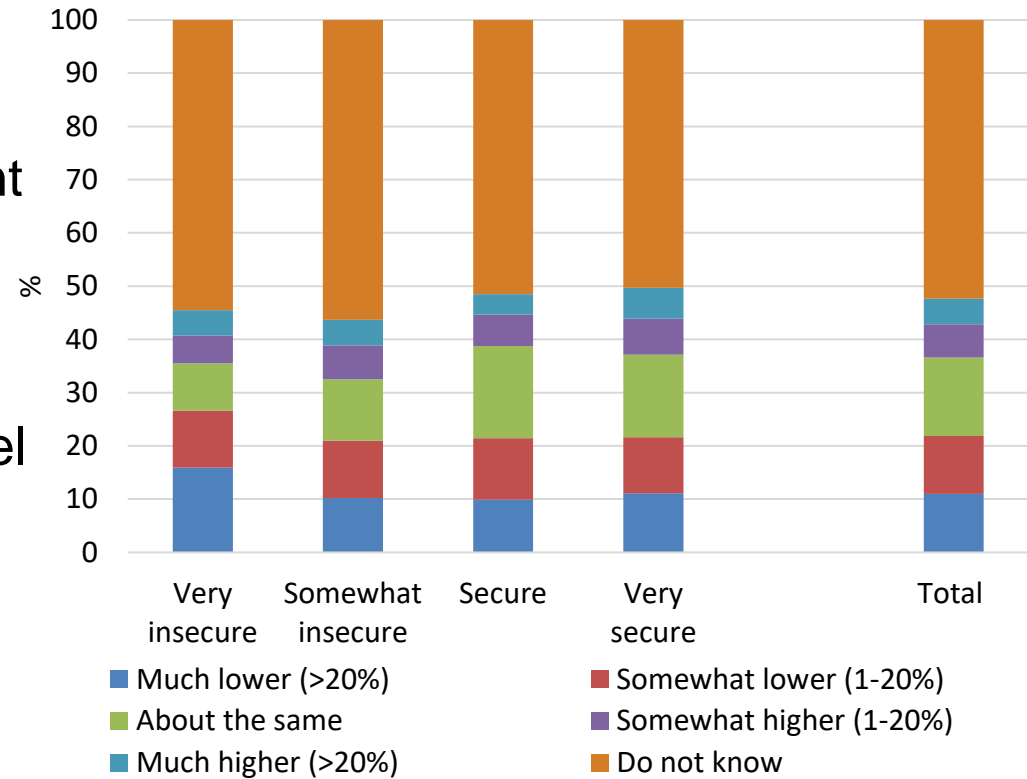


FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

MONSOON 2022 – FARM: EXPECTED PADDY OUTPUT

- No large changes in land cultivated
- Majority farmers do not want to state yet expectations of harvest
- Of those that state: 46% lower output at national level
- For very insecure, 58% lower output



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



managed by **UNOPS**



SUMMARY/KEY TAKEAWAYS

- **Summer crop:**

1. Agricultural inputs mostly available – but increasing issues in labor markets (migration and insecurity)
2. Large price changes in inputs... but also large price increases of crops
3. No large reductions in input/output
4. Heterogeneity (small and insecure worse off – farmers with market access better off)

- **Monsoon crop:**

1. No large changes in land area cultivated
2. Reduction in fertilizer use (40% reduction urea use)
3. Lower yields and outputs

SUMMARY/KEY TAKEAWAYS

- Agriculture a source of resilience but worrisome that farmers scale back in input use and investments.

Implications:

1. Improving security
2. Smaller farmers worse off: Agricultural cash grants
3. Labor an important constraint:
 - Targeting of laborers in aid programs (if possible); expanded cash-for-work programs to assure reliable incomes and address shortage of rural labor
 - Assure functioning mechanization sector



FEED^{THE}FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

MYANMAR.IFPRI.INFO



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



managed by UNOPS



FEED THE FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

ကျေးဇူးတင်ပါတယ်
Thank you



USAID
FROM THE AMERICAN PEOPLE



MYANMAR

MICHIGAN STATE
UNIVERSITY®



Livelihoods and Food Security Fund



managed by UNOPS



FEED^{THE}FUTURE

The U.S. Government's Global Hunger & Food Security Initiative

www.feedthefuture.gov

