

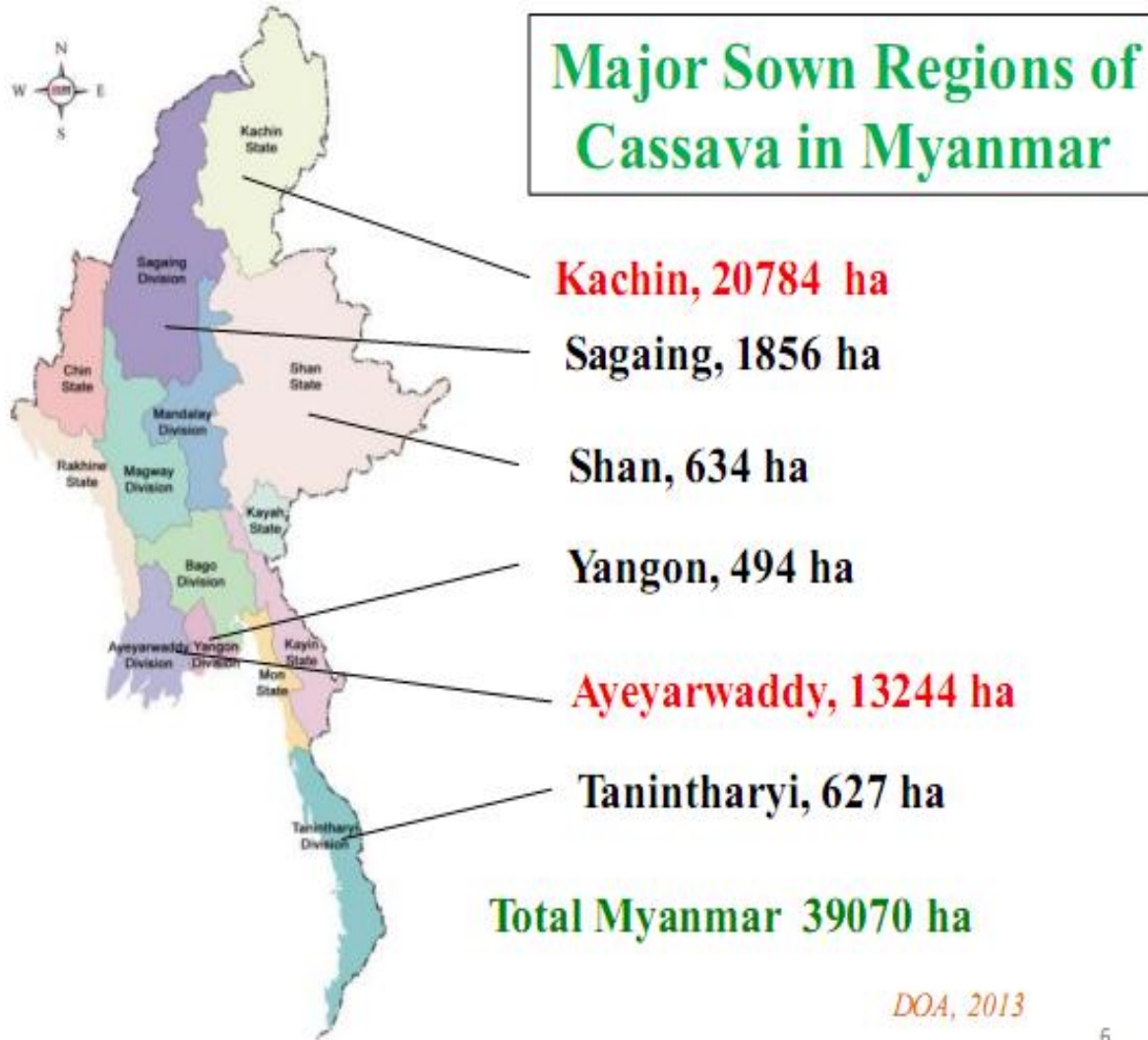


CURRENT STATUS OF CASSAVA INDUSTRY DEVELOPMENT IN DELTA REGION-MYANMAR

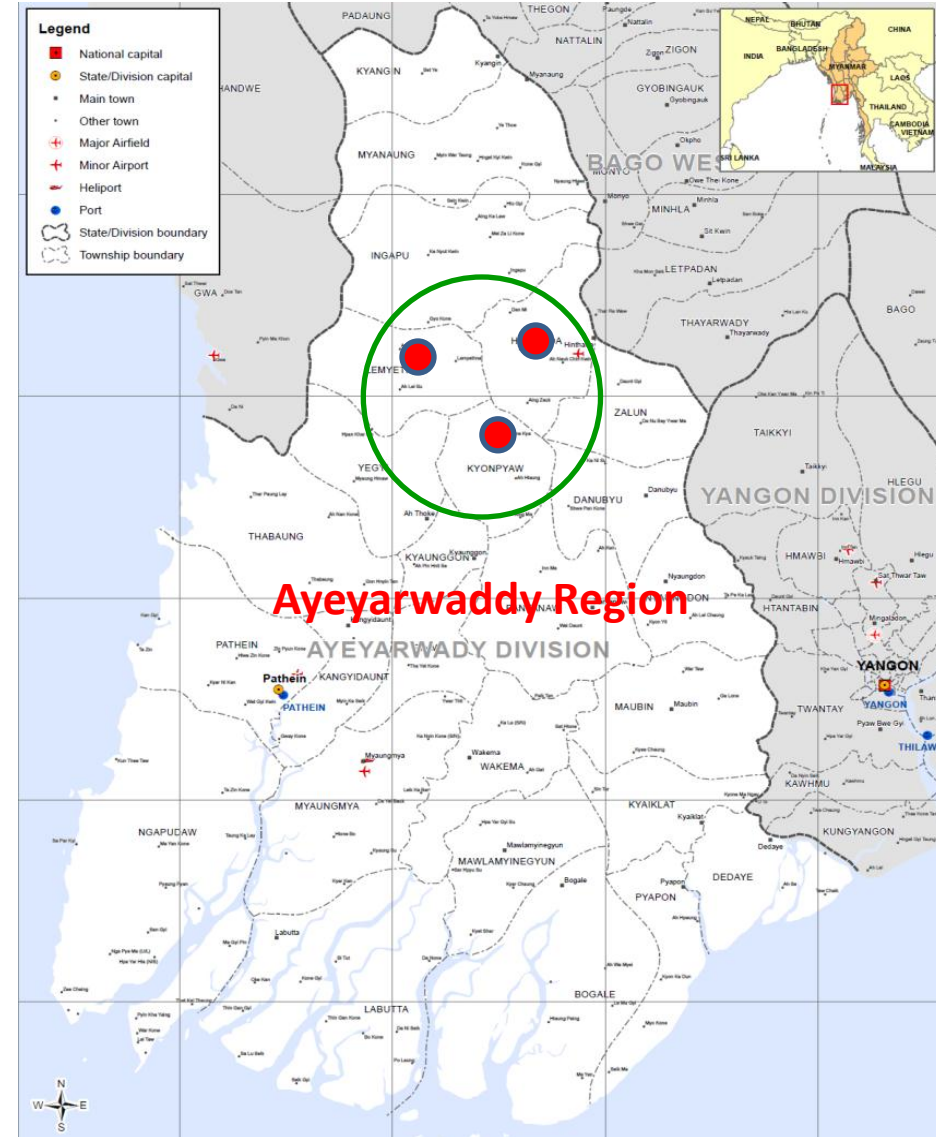
KYAW THURA
CASSAVA GROWERS, MILLERS AND TRADERS ASSOCIATION



Cassava in Myanmar



DOA, 2013



Cassava Production in Delta Region

Brief Information- cassava production in Ayeyarwaddy (2017 update)

Cassava Growing Area : 31613 acres (12789 ha)/3rd most important crop in delta after paddy & puleses

Major growing area : Kyonpyaw, Hintharda, Laymyat-nar townships

Average cassava root yield : 14 ton/ha

Annual root production : about 155000 ton/year

Annual starch production: about 43400 ton/year

Cultivation method: Plant cassava with mounts as below (plant population about 1500-2000 plants /acre)



Nearly **30000** rural-families are related to cassava value chain activities for their livelihood in the region.



Main Cassava Varieties in Ayeyarwaddy Region

Two main cassava varieties are widely grown in Ayeyarwaddy : locally called Malaysia & Japan Varieties



Some important activities for advanced cassava production technology for small holder farmers in Delta



Field day



Field day



workshop



Trial



Field visit



workshop

Sharing knowledge and technology to cassava farmers by association members



Farmer meeting



Farmer meeting



Group discussion



Training



Model farm



Model farm

After getting knowledge from field day, work-shop and group meeting, some farmers start trying to apply new knowledge & technology in their field ...in recent years...



Impact of cassava development activities

By changing only **cultivation practice**, Ko Poe Thum (Mr. Iron) got yield increment from **14 ton/ha to 24 ton/ha**. But he used only nitrogen fertilizer with the dosage (3 bags (50kg) per acre). Like him, number of farmers adopting new technology are dramatically increase in some area. There is a huge potential to promote the yield in the region. But, there still need many researches, trials and activities to help them effectively.

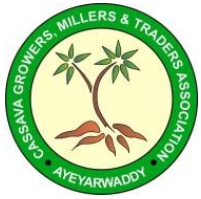


At Moe-joe-pyit village, Kyonpyaw Township

Impact of cassava development activities

On the other hand, our association learned and applied new technology and knowledge we received and finding the ways to boost the yield and income of smallholder farmers with the production cost as low as minimum.





Mechanization

We are start trying to introduce mechanization in cassava farming in Ayeyarwaddy Region.



Cassava Processing in Delta Region

Starch production- 1



Starch production- 1



Starch production- 2



Starch production- 2



Cassava Peeling Machine



Starch production capacity : Minimum 1 ton – Maximum 7 ton per day : Most : **2 ton per day**
About 200 factories in three townships in Delta region. Normally, **25-50** employees get jobs in each factory.



Processing season is from Jan to First week of April (**about 100 days**) due to starch drying is depend on the sun drying method. Processing sector need many activities for development.



Cassava industry create many job opportunities for rural women to get income for their families.



Cassava Products & Market in Myanmar

Cassava Starch

Almost all Cassava Roots are processed to produce cassava starch in Delta region





Inside the cassava pearls(sago) production factory in Delta region

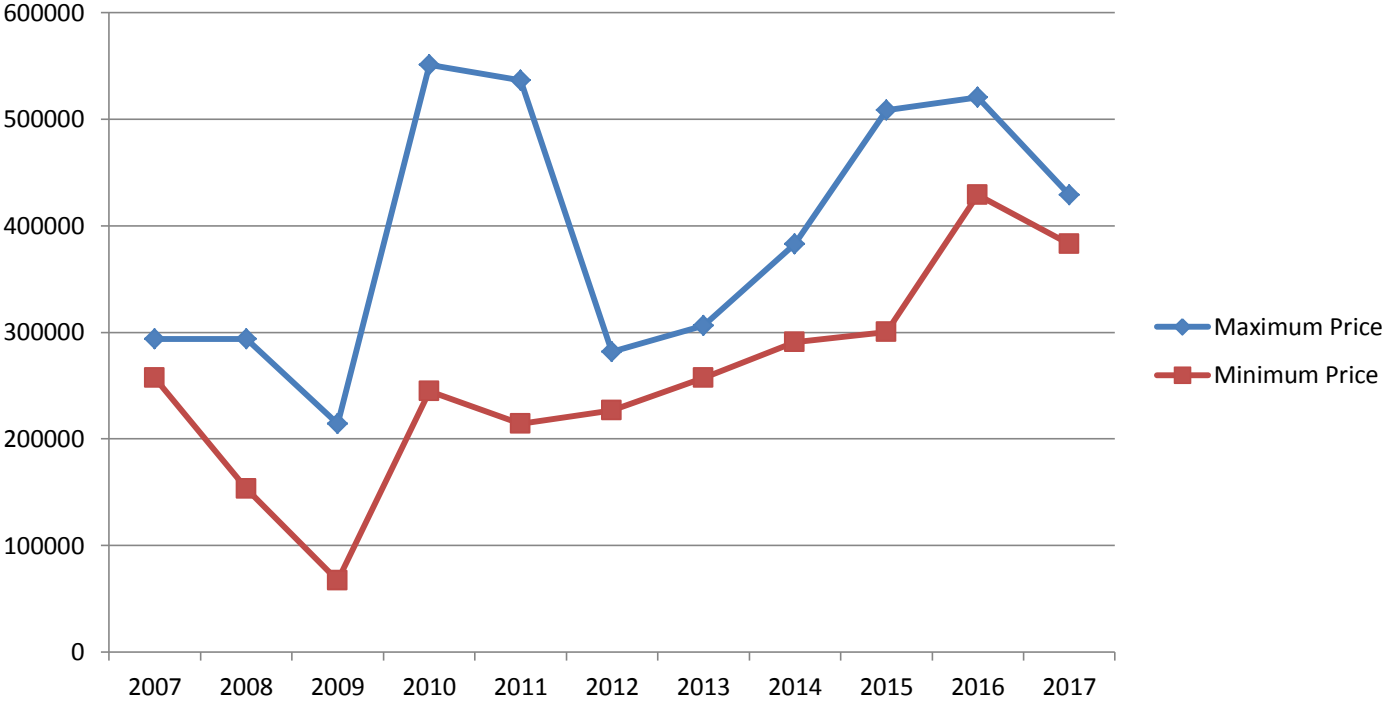
Cassava By-product : cassava pulp residue from starch factories are mainly used as animal feed.



Dried Cassava pulp balls are powdered by machines and sell particularly for fish & chicken feed production factory.



Cassava Starch Price (MMK)Record in Ayeyarwaddy Region: 11 years



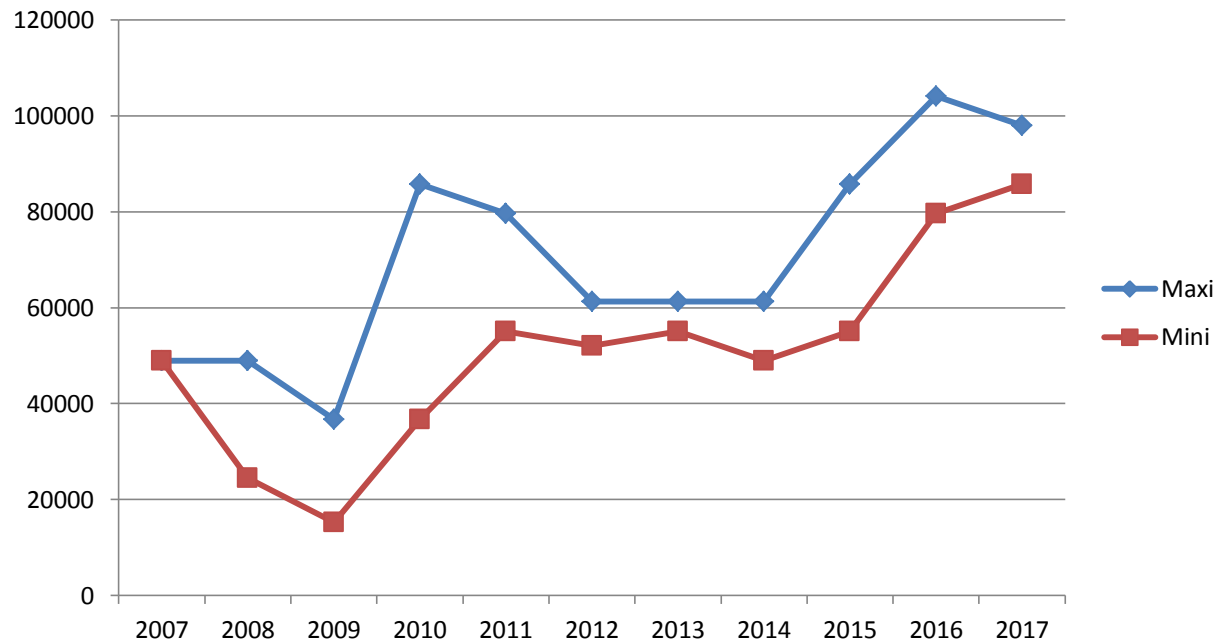
| | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Maximum Price | 293947 | 293947 | 214337 | 551151 | 536454 | 281699 | 306195 | 382744 | 508284 | 520532 | 428673 |
| Minimum Price | 257204 | 153098 | 67363 | 244956 | 214337 | 226584 | 257204 | 290885 | 300071 | 428673 | 382744 |

2016: Minimum price : 317 USD /ton
 Maximum price: 385 USD/ton

2017: Minimum price : 283 USD /ton
 Maximum price: 317USD/ton

Exchange Rate:
 1350MMK/USD

Cassava Root Price (MMK)Record in Ayeyarwaddy Region: 11 years



| | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|
| Maxi | 48991 | 48991 | 36743 | 85735 | 79611 | 61239 | 61239 | 61239 | 85735 | 104106 | 97982 |
| Mini | 48991 | 24496 | 15310 | 36743 | 55115 | 52053 | 55115 | 48991 | 55115 | 79611 | 85735 |

2016: Minimum price : 58 USD /ton
Maximum price: 77 USD/ton

2017: Minimum price : 63 USD /ton
Maximum price: 72 USD/ton

Exchange Rate:
1350MMK/USD

Future Prospects

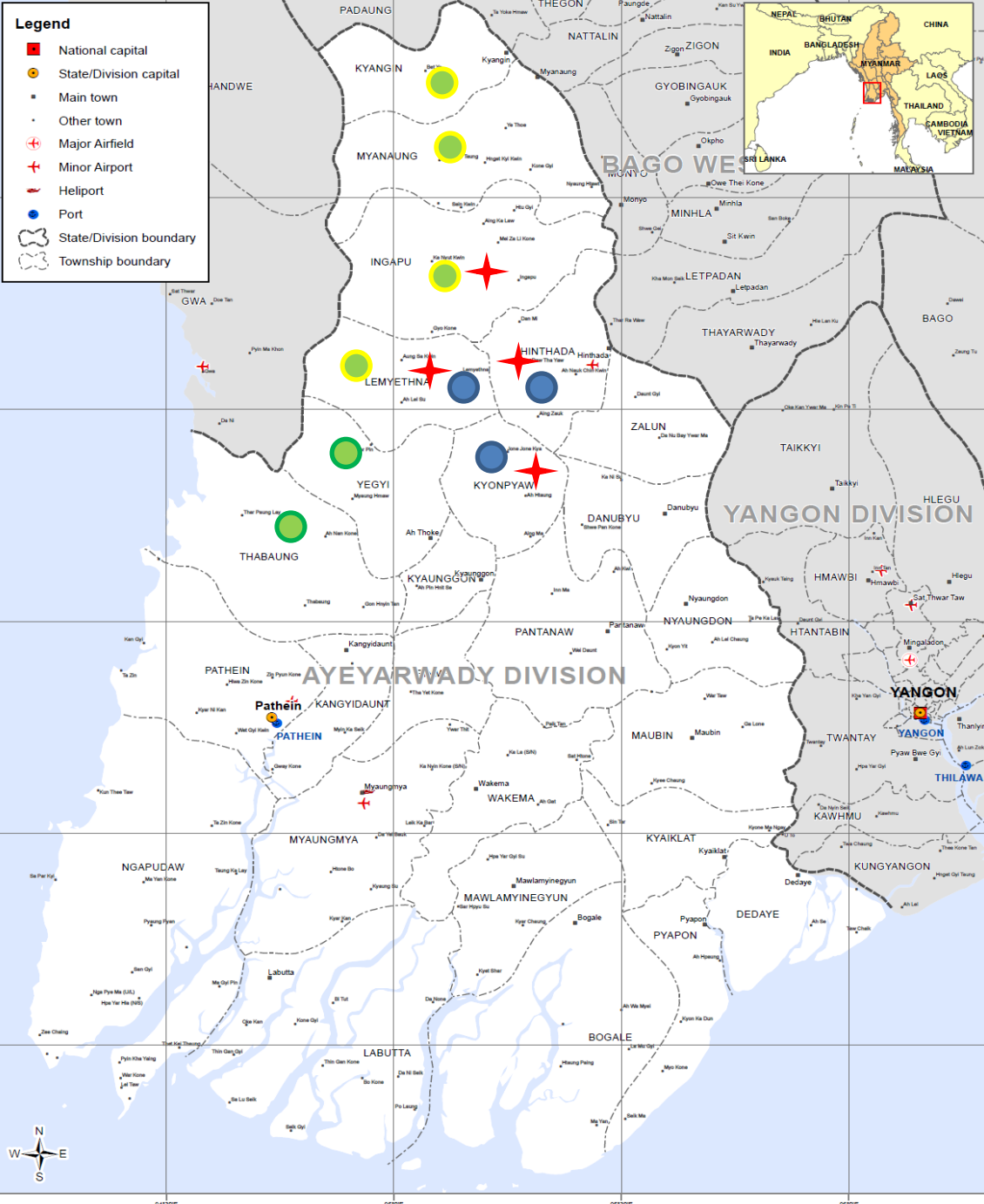


Ayeyarwaddy has many virgin land to expand the cassava industry horizontally and vertically



Legend

- National capital
- State/Division capital
- Main town
- Other town
- ✈ Major Airfield
- ✈ Minor Airport
- ✈ Heliport
- Port
- ⬮ State/Division boundary
- ⬮ Township boundary



- Existing growing area
- Potential Area
- Potential Area (more prefer)
- ★ Model farms (2016-2017)

Future Prospect of domestic utilization of cassava in Myanmar

| No | Country | Land Area (km2) | Population | Per Capital Income (USD) | | Production Million Ton | Domestic Utilization (fresh root ton) |
|----|-------------|-----------------|-----------------|---------------------------|-------------|------------------------|--|
| | | | | 2011 | 2014 | | |
| | | | | 2011 | 2014 | 2015 | 2014 |
| 1 | Brunei | 5765 | 421000 | 36583 | 36607 | - | 171 |
| 2 | Cambodia | 181035 | 15040000 | 931 | 1081 | 8.441 | 6229286 |
| 3 | Indonesia | 1904569 | 255462000 | 3508 | 3534 | 27.403 | 24367000 |
| 4 | Lao PDR | 236800 | 6802000 | 1203 | 1693 | 0.953 | 896800 |
| 5 | Malaysia | 329000 | 31032000 | 9700 | 10804 | 0.064 | 42000 |
| 6 | Myanmar | 676578 | 52280000 | 832 | 1221 | 0.495 | 508097 |
| 7 | Philippines | 299764 | 102965000 | 2223 | 2865 | 2.5 | 2550000 |
| 8 | Singapore | 710 | 5541000 | 49270 | 56319 | - | 1400 |
| 9 | Thailand | 513120 | 68387000 | 5394 | 5445 | 31.24 | 6800000 |
| 10 | Vietnam | 331210 | 91812000 | 1374 | 2053 | 9.969 | 6499685 |



Thanks for your attention !!!



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President

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