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## Analysis of Pulses Industry Value Chain in Bago and Mon State, Myanmar

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### Abstract

Agriculture sector in Myanmar has a fundamental role in promoting inclusive growth and poverty reduction. Pulses production has grown more rapidly than any other crop since liberalisation in 1988. The competitive structure and liberalised market of pulses has resulted in more profitable value chain engagement for farmers and other market actors along the pulses value chain, even more than for other crops. Myanmar produces over 20 varieties of beans and pulses and many of these varieties are export-only commodities. Pulses are one of the most profitable crops to farmers in terms of comparative advantage. This study aims to gain insight into pulses value chain development options and the market environment in the Bago Region and Mon State of Myanmar, with special consideration given to gender and environment dynamics. The study applied the value chain approach in identifying linkages between farmer groups, commercial buyers and private service providers in order to increase profitability throughout the industry. Primary data collection related to key actors along pulses value chains were carried out by personal interview and key informant interview methods at village cluster and township level. The pulses value chain starts from input suppliers to market intermediaries, local consumer to export market in India. Pulses processing usually involve two steps. Primary processing consists of receiving, cleaning and quality sorting of seeds. Secondary processing consists of preparing seeds for consumer use and can include dry packing, canning and the making of soup mixes, powder and flour. However, in study areas, secondary processing is minimal with the processing sequences ending at dry packing. Many of these pulses are sent in their raw state to the traders. If Myanmar can focus on producing more value added beans and pulses, improving farmers' conditions through financial and technical assistance and garnering more private and public sector research and development (R&D), the industry can continue to grow.

**Keywords:** Constraints, Myanmar, pulses, value chain