MYANMAR TUR OUTLOOK

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MYANMAR

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BEANS & PULSES AGRICULTURE IN MYANMAR

- Myanmar is an agricultural country, and the agriculture sector is the backbone of its economy.

- The agriculture sector contributes to **37.8 percent of Gross Domestic Product (GDP)**, **accounts for 25% to 30% of total export earnings** and **employs 70% of the labour force**.

- Myanmar's unusually fertile soils and abundant water source are legendary in Southeast Asia. Almost anything can be grown in the country, from fruits to vegetables and, from rice to pulses.

- Myanmar grows about 24 different types of beans and pulses, including Black Matpe (Urad), Pigeon Peas (Tur), Green Gram (Mung Bean), Soybean, Chickpea, Butter Bean, Cowpea, Lima Bean, Black-eyed Bean, Groundnut, and Kidney Bean

- Black Matpe, Mung Bean, and Tur whole account for 70% - 75% of total pulses production of Myanmar and are the largest exported varieties. Approximately 80% - 90% of total Tur whole production and 70% - 80& of total Black Matpe is exported to India and the domestic wholesale prices are highly dependent on India's demand.

- Pulses improve the efficiency and resilience of cropping systems. Adding pulses to a cropping system can significantly boost total productivity of all crops in a rotation by increasing availability of Nitrogen and other mineral nutrients.

- Pulses have a low water and energy footprint compared to most other protein sources.

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TOOR WHOLE – AN INTRODUCTION

- Pigeon Peas or Tur whole, known as Arhar in India, is one of the most popular pulses in India.

- From a nutrition point of view, Tur is a low-fat, high-fibre and very rich source of protein and is the most favoured plant protein for vegetarians.

- Tur in combination with cereals make a well-balanced meal and hence is favoured by Nutritionists as an essential ingredient for balanced diets.

- India grows around 63% of world Tur crop followed by East Africa, Central America and parts of Southeast Asia.

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MYANMAR - KEY TOOR GROWING AREAS

- Tur is mainly grown in the Central Myanmar region which has semi arid & dry conditions with a hot and humid summer which is ideal for Tur crop.

- Mandalay, Sagaing, Magway divisions and Chin State (as we see in the map) contribute to over 95% of Tur Crop in Myanmar.

- Tur is grown as a monsoon crop in the Central Plain areas. Sowing time is in monsoon around June/July and harvest is December/January/February. It is a 6-month crop but needs very less manure and tending by farmer.

- Main varieties of Tur in Myanmar are – Lemon, Linkhay Shefla, Malai Shefla, Shwebo, Red & White Bold but mainly exported varieties nowadays are Lemon & Linkhay.

- Chin State mainly produces Linkhay quality while all other areas including key centres spread over these states like Pakkoku, Monywa, Kyaukpadaung, Meithila, Myingyan, Pyay, Kyauk Se produce lemon quality.

- Key differentiator for Linkhay compared to Lemon variety is the uniformity, bigger size of grain and less damage percentage which makes it favourite for dal millers.

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PICTURES OF TOOR PLANTS (CLOCKWISE) FROM FLOWERING TO GETTING THE GREEN BEANS (FALI) WHICH MATURES, DRIES AND YIELDS PIGEON PEAS (TOOR WHOLE)

TOOR WHOLE

TOOR PLANT FLOWERING

DRIED BEANS

GREEN BEAN

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TOOR WHOLE – FIGURES AT A GLANCE

	YEAR 2020 (IN MT)	YEAR 2021 (IN MT)	YEAR 2022 (IN MT)
OPENING STOCK	80,000	70,000	10,000
PRODUCTION DURING THE YEAR	175,000	110,000	250,000
EXPORTS	185000	170,000	
BALANCE / CARRYOVER STOCK	70,000	10,000	

- For Tur exports, Myanmar mainly depends on India with very little quantity being exported to Nepal, UAE, etc.
- More consistent Import Policy from India will help consistent production in Myanmar which caters to Indian demand in big way.
- 5-year MoU is a welcome step, and it will help the bilateral trade as well as provide stability.

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THANK YOU