

# The Role of Agri-business in Advisory and Marketing Services in Myanmar

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Australian Government  
Australian Centre for  
International Agricultural Research



# Project Background

- **The Project regions – Funded by USAID (Ayeyarwaddy, Bago, Yangon)**
- **Southern Shan – A pilot project shared between FSI and Syngenta**
- **Dry Zone – Funded by LIFT (Myingyan, Mahlaing, Natogyi, Pakokku, Taungtha and Yesagyo)**



# Background: Fertilizer Retail Market

- **Domestic (urea)**

**Plants : Sale\***, Kyaung Chaung, Kyaw Zwa, Myaungtaga\* and Kan Gyi Daunt\*

**Total Production : 166,017.28mt (2014-15), 130,431.25mt (2015-16), 82,502mt (2016-17)**

- **Imported (overland by truck and by sea)**
- **Fertilizer Products Registers - 3567**
- **Registered Retail Shops - 5200**

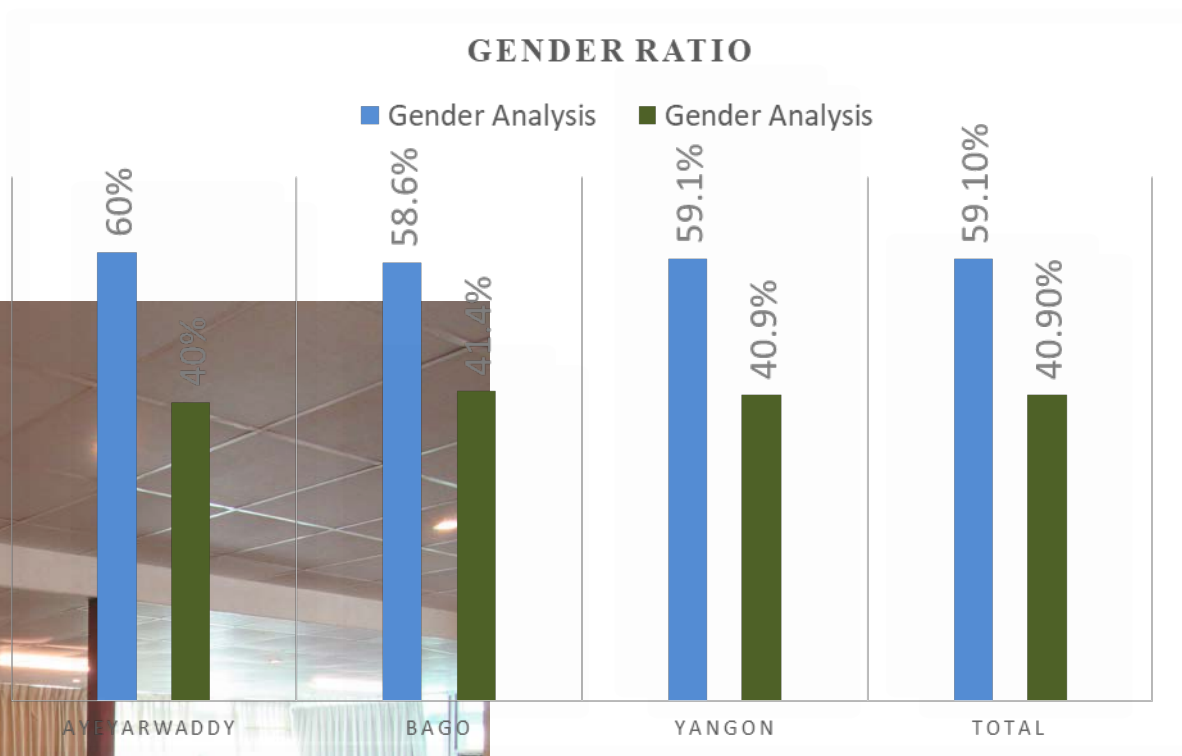
# The Impact of Retailers Training

- **Training Program**

No.	Location	Male	Female	Total
1	Yangon	20	8	28
2	Yangon	17	7	24
3	Aung Ban	12	16	28
4	Taunggyi	9	24	33
5	Pindaya	20	10	30
6	Bago	13	18	31
7	Yangon	13	18	31
		104	101	205

# The Project regions

## Gender Ratio



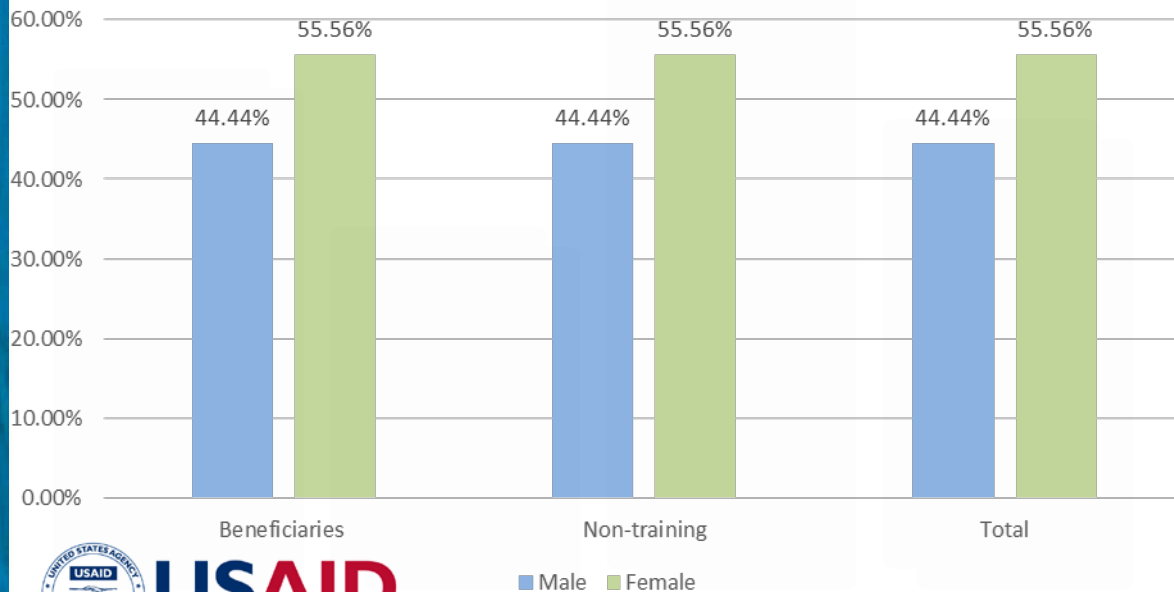
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- Gender Ratio



Gender Ratio (Shan)





# The Impact of Retailers Training

- **Beneficiaries vs Non-training Retailers**
- **Supply Chain : Wholesale, Retail, Both**

Project regions	Whole Sale		Retail		Both	
	Beneficiary	Non-training	Beneficiary	Non-training	Beneficiary	Non-training
Ayeyarwaddy	0%	0%	20.0%	0%	80%	100%
Bago	6.7%	0.0%	40.0%	14.3%	53.3%	85.7%
Yangon	0	0	0	33.3%	100%	66.7%

Shan	Wholesale	Retail	Both
Beneficiaries	3.7%	48.1%	48.1%
Non-training	5.6%	33.3%	61.1%

# The Impact of Retailers Training

- **Selling Agro-Input Products :**  
**Fertilizer, Pesticides, Both**

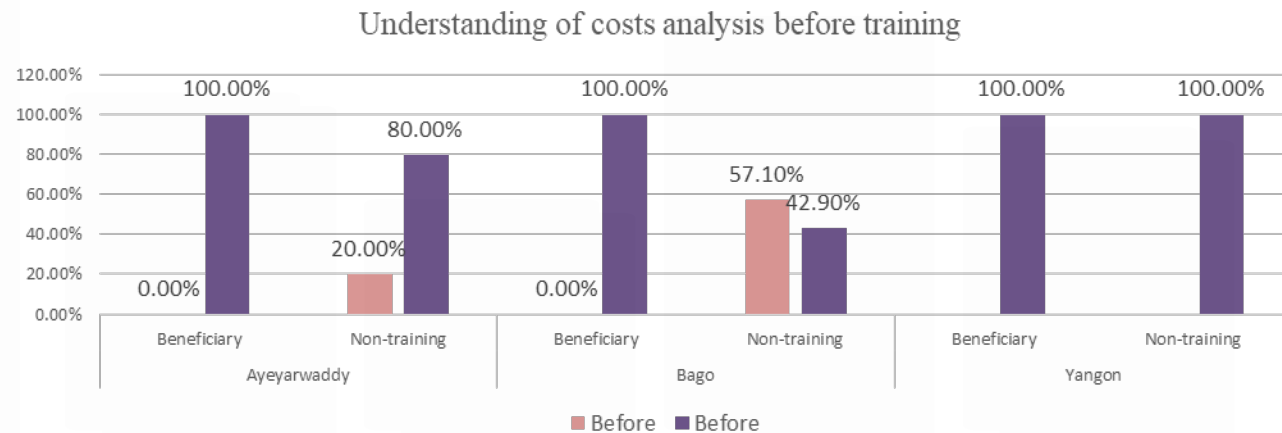
Project regions	Fertilizer		Both	
	Beneficiary	Non-training	Beneficiary	Non-training
Ayeyarwaddy	40%	40%	60%	60%
Bago	13.3%	7.1%	86.7%	89.7%
Yangon	0	33.3%	100%	66.7%

Shan	Fertilizer	Pesticides	Both
Beneficiaries	37%	14.8%	48.1%
Non-training	44.4%	5.6%	50%

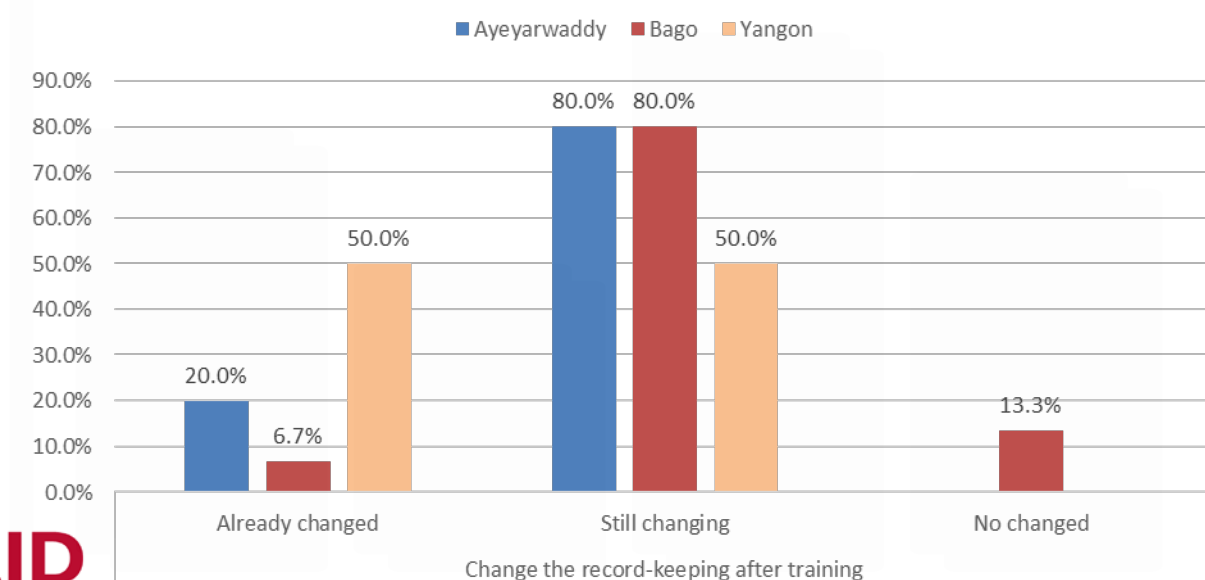


# The Project regions

- Understanding of Costs Analysis (before training)



- Changes in the Records-Keeping (after training)



- **Understanding of Costs Analysis (before training)**

**Before** having training

**Beneficiaries 18.5% vs Non-training 16.7%**

**After** having training **Beneficiaries 81.5%**

**Non-training retailers 83.3% confirmed “No”**

- **Changing the Records-Keeping (after training)**

**Already Changed : 7.4%**

**Changing Process : 88.9%**

**Unchangeable : 3.7%**

# The Project regions

- The Status of Market Share

Project regions	Beneficiaries	
	Village	Farmer
Before training	504	4853
After training	736	7405

**After training**

**On average 13.64 villages, 170.13 farmers increased.**

## Southern Shan

- The Status of Market Share

**After training**

**On average 2.22 villages, 92.96 farmers increased.**

Shan	Beneficiaries	
	Village	Farmer
Before training	664	13460
After training	724	15970

# The Project regions

- **Understanding of Net Profit Calculation**

- Beneficiaries calculated the net profit

- Non-training retailers unable-

**Ayeyarwaddy 80%, Bago 78.6%, 100% Yangon**

## **Southern Shan**

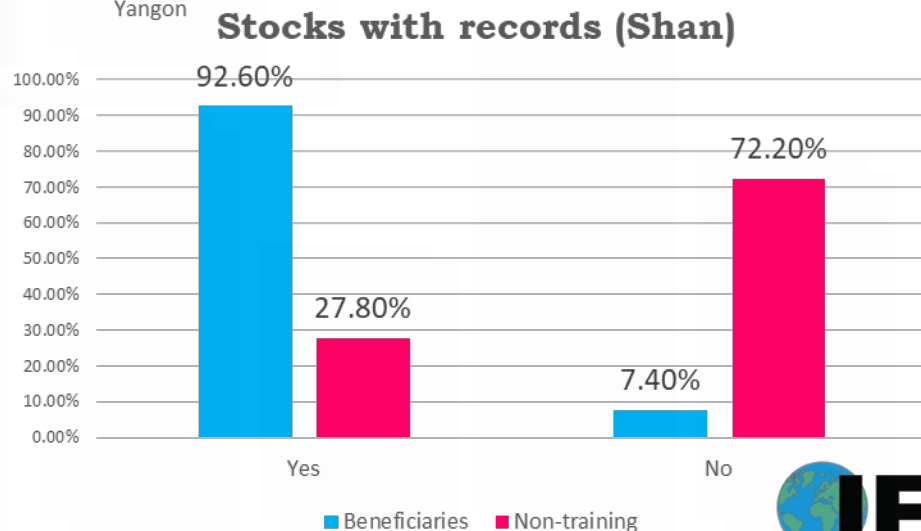
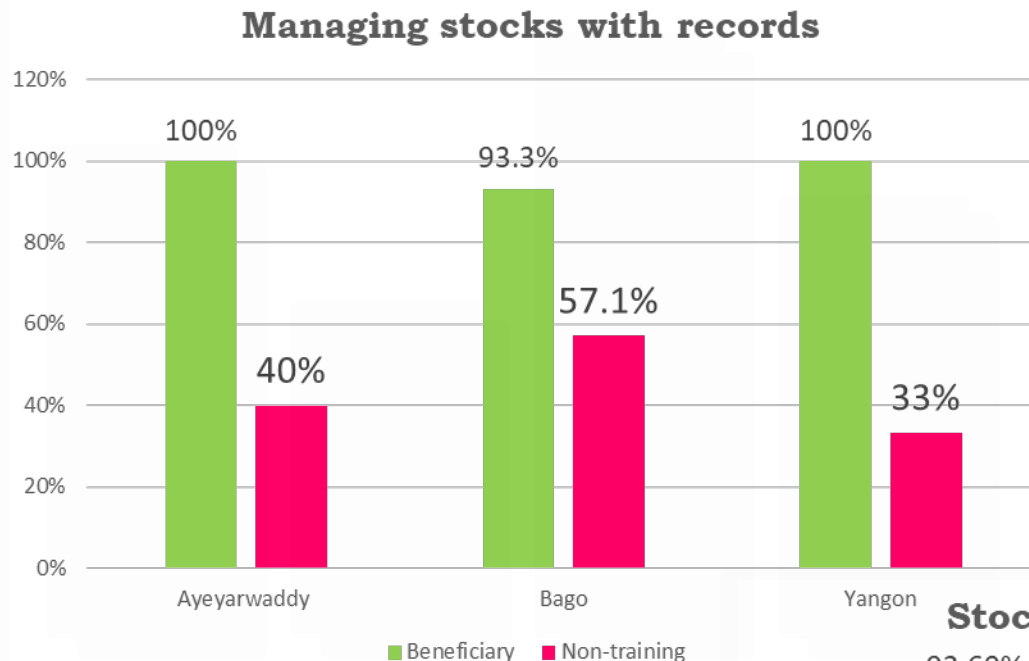
- **Understanding of Net Profit Calculation**

- Beneficiaries calculated the net profit

- Non-training retailers unable-

# The Project regions

- Managing Stocks with Records



**Southern Shan**



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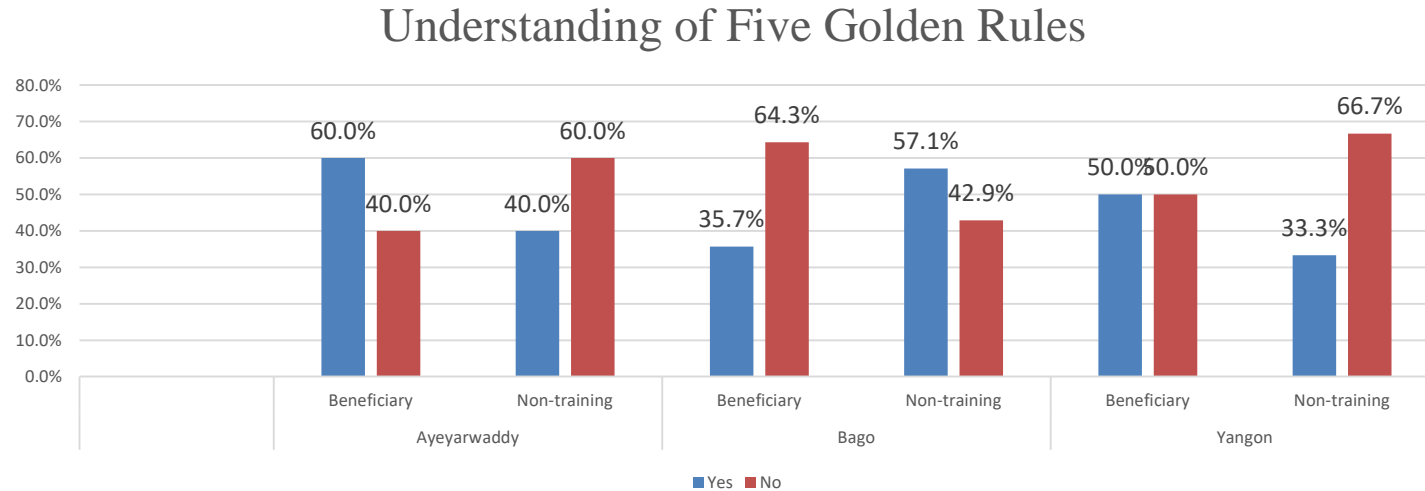




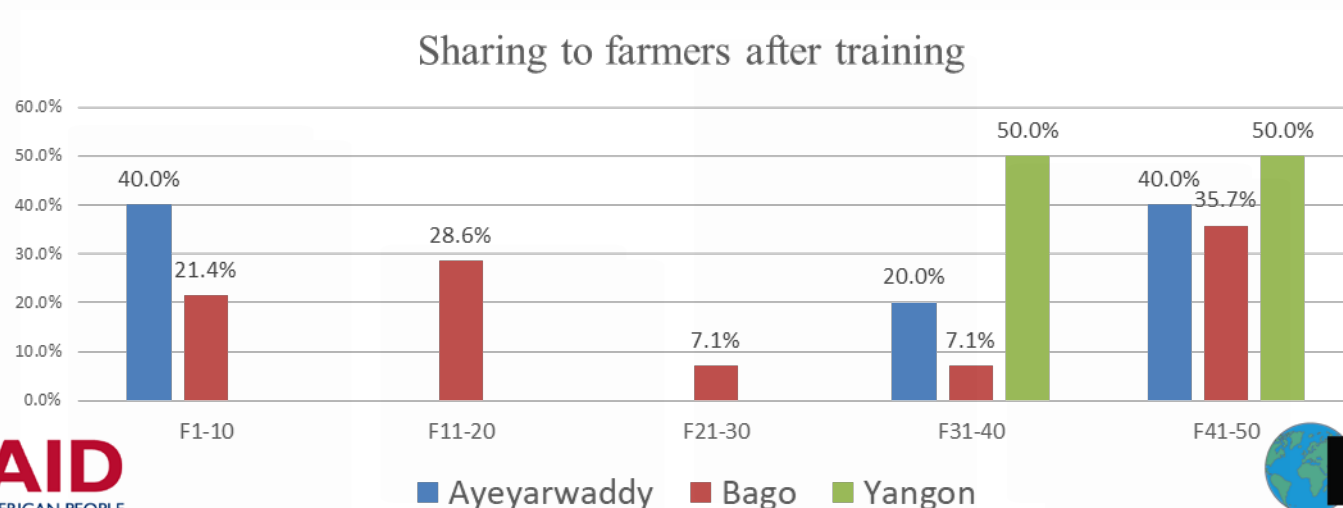


# The Project regions

## • Understanding of Five Golden Rules (before)



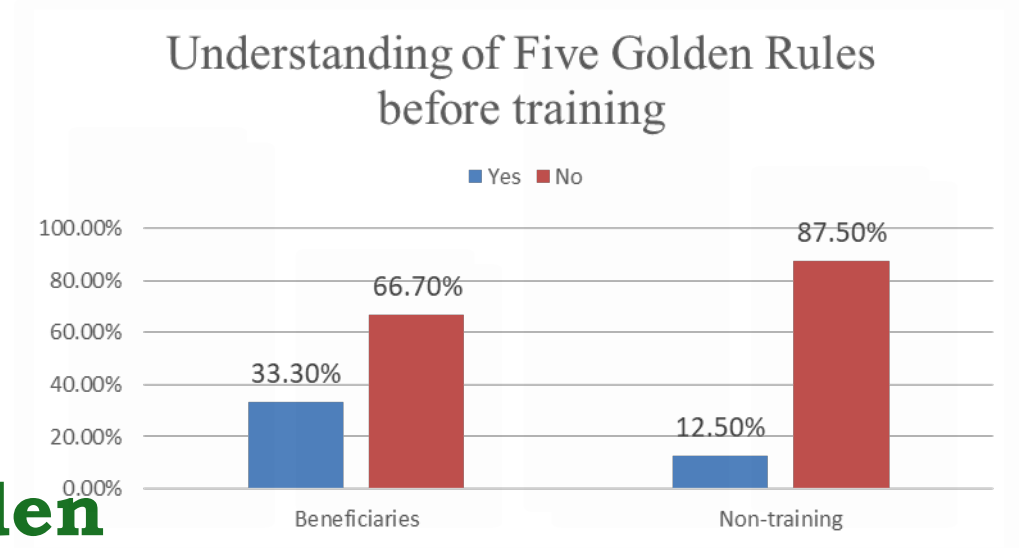
## • Sharing Five Golden Rules to Farmers (after)



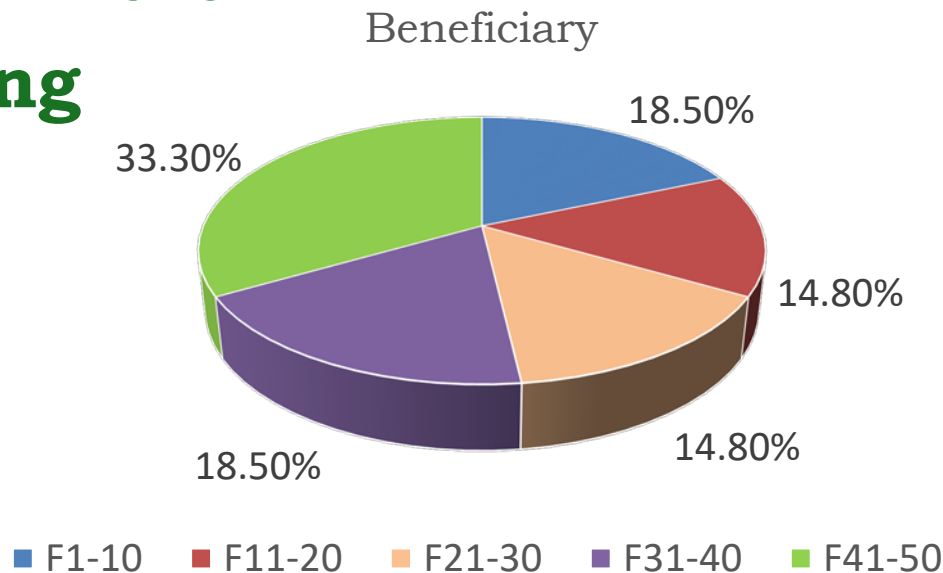
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- Understanding of Five Golden Rules



- Sharing Five Golden Rules to Farmers after training



# Conclusion

- **Trained dealers could measure their actual business performance**
- **Trained dealers know the role of their services that can differentiate them and make them competitive in the market**
- **Trained dealers know how to capture the window of opportunity**

# Suggestion

- **Superior level of customization**
- **Acquire Modern business techniques**
- **Reduce unnecessary costs**
- **Look for opportunity to expand the business channels**

# Q & A



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