Agricultural Sector Strategic Development Plan
(ASDP) 2014-2018

Department of Planning and Statistics
Ministry of Agriculture, Forestry and Fisheries
Phnom Penh, 24 June 2015
Contents

1. General Context of Agriculture

2. Agricultural Sector Strategic Development Plan 2014-2018

3. Strategic Framework for Climate Change
1. General Context of Agriculture

![Graph showing the share of agriculture sector in GDP from 2010 to 2014.](chart)

![Pie chart showing the composition of sub-sectors in agriculture for 2014.](chart)
2. Agricultural Sector Development Strategic Framework

Rectangular Strategy III of RGC
*(Growth, Employment, Equity & Effectiveness)*

**National Strategic Development Plan (NSDP)**

**Four key elements:** (1) annual economic growth of 7% (2) creating more jobs (3) achieving more than 1% reduction in the poverty rate annually (4) improving institutional capacity and governance

**Agricultural Sector Strategic Development Plan 2014-2018**

**Overall Policy Goal**

"Increase agricultural growth around 5% per annum through enhancement of the agricultural productivity, diversification and commercialization and livestock and aquaculture farming, by taking into account sustainable forestry and fisheries resource management"
2. Agricultural Sector Development Strategic Framework

Key Indicators in NSDP 2014-2018

Poverty Rate (%)

- 2007: 47.8
- 2008: 29.9
- 2009: 22.9
- 2010: 21.1
- 2011: 19.8
- 2012: 17.9
- 2013: 16.9
- 2014: 15.9
- 2015: 14.9
- 2016: 13.9
- 2017: 12.9
- 2018: 12.9
2. Agricultural Sector Development Strategic Framework

Key Indicators in NSDP 2014-2018

<table>
<thead>
<tr>
<th>Key Indicators</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic Growth (%)</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Agriculture Growth (%)</td>
<td>4.2</td>
<td>4</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Industry Growth (%)</td>
<td>9.9</td>
<td>9.3</td>
<td>9.1</td>
<td>8.8</td>
<td>8.8</td>
</tr>
<tr>
<td>Service Growth (%)</td>
<td>6.8</td>
<td>7.1</td>
<td>7.1</td>
<td>7.2</td>
<td>7.2</td>
</tr>
</tbody>
</table>

![GDP Per Capita (US$)](chart.png)
**Rectangular Strategy III: Growth, Employment, Equity and Effectiveness**

NSDP 2014-2018: annual economic growth of 7% and achieving more than 1% reduction in the poverty rate annually

Increase agricultural growth around 5% per annum

**Pillar 1:**
Enhancement of the agricultural productivity, diversification and commercialization

**Pillar 2:**
Promotion of livestock and aquaculture

**Pillar 3:**
Sustainable fisheries and forestry resources management

**Pillar 4:**
Strengthening the institutional capacity and increasing efficient supporting services and human resource development
Programmes

Programme 1: Enhancement of Agricultural Productivity, Diversification and Commercialization

Programme 2: Promote Animal Health and Production

Programme 3: Sustainable Fisheries Resources Management

Programme 4: Sustainable Forestry & Wildlife Resource Management

Programme 5: Strengthening Institutional Capacity, Enhancing Efficiency of Supporting Services and Human Resource Development

Sub-Programmes/Projects/Activities for Achieving Policy Goal

Increase agricultural growth around 5% per annum
2. Agricultural Sector Development Strategic Framework

**Strategic Approaches to Achieve Policy Goal**

**Overall Policy Goal:**
“Increase agricultural growth around 5% per annum through enhancement of the agricultural productivity, diversification and commercialization and livestock and aquaculture farming, by taking into account sustainable forestry and fisheries resource management”

Reduce production **costs** – increase **productivity** - market **competition** - farm income

**Change from “Extensive” to “Intensive” Farming – Value chain development**
- Input costs: Seed, Chemical fertilizer & pesticide, mechanization, irrigating, soil improvement
- Technical capacity: R&D, Extension, Agricultural education & vocational skills - GAP - CC
- Market Connection: Farmers/Cooperative & contract farming/Trader Groups - SPS
- Increase private sector investment: Inputs, processing, machinery, etc.

**Fishery: “Maintain natural capture” + “Increase aquaculture”**
- **Conservation:** Fishery resource protection, conservation, Community Fisheries ...
- **Development:** Aquaculture development: R&D, Extension, increase fishery farms, private investment, etc.

**Forestry: Increase “Forest cover – 60%”**
- **Conservation:** Forestry conservation and protection – Community Forestry, REED+
- **Development:** Reforestation – Private investment, R&D, tree seedling ... etc.

**Sustainable Natural Resources Management**
Linking in Agricultural Value Chains: “Public Private Farmer Partnership – PPFP”

**FARMER**
- Agricultural Cooperative
- Farmers’ Groups

**PRIVATE**
- SME/Manufacturers
- Trader Associations
- Exporters ...
- etc.

**GOVERNMENT**
- Contract Farming
- Technology – R&D, Extension, Input ...
- Capital
- Regulatory Framework- SPS, GAP ...
- etc.
- Infrastructure

**Agricultural Industrial Zone/Parks**
- Domestic Consumption
- Export
2. Agricultural Sector Development Strategic Framework

Programme Approaches to Achieve Policy Goal

**Overall Policy Goal:**
“Increase agricultural growth around 5% per annum through enhancement of the agricultural productivity, diversification and commercialization and livestock and aquaculture farming, by taking into account sustainable forestry and fisheries resource management”

**Programme 1: Enhancement of Agricultural Productivity, Diversification and Commercialization**

**Objective of Programme-1:**
“To promote the output growth of all kind of crops by 10% per year through the increase of agricultural research and extension aiming to increase crop yield, enhance the product quality, strengthening capacity of agricultural cooperatives in connection with contract farming system and improving sustainable agricultural land management and utilization”

<table>
<thead>
<tr>
<th>Indicators</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Area under all type of crop (million ha)</td>
<td>4.81</td>
<td>5.02</td>
<td>5.23</td>
<td>5.44</td>
<td>5.65</td>
</tr>
<tr>
<td>2. Rice Yield (ton/ha)</td>
<td>3.17</td>
<td>3.18</td>
<td>3.21</td>
<td>3.23</td>
<td>3.25</td>
</tr>
<tr>
<td>3. Paddy Surplus (million ton)</td>
<td>5.24</td>
<td>5.41</td>
<td>5.60</td>
<td>5.79</td>
<td>6.00</td>
</tr>
</tbody>
</table>
2. Agricultural Sector Development Strategic Framework

Programme Approaches to Achieve Policy Goal

Programme-2: Promote Animal Health and Production

Objective of Programme-2:

“To increase the growth rate of animal production by 3% per year based on the effectiveness of research and extension; improving capacity of animal disease and zoonosis prevention, ensuring the supply of animal and meat with sanitary and safety, and increasing potential of exportation”

<table>
<thead>
<tr>
<th>Indicators</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Animal Production (million heads)</td>
<td>35.86</td>
<td>36.93</td>
<td>38.03</td>
<td>39.17</td>
<td>40.34</td>
</tr>
<tr>
<td>2. Rate (%) of Vaccinated Animal</td>
<td>10</td>
<td>12</td>
<td>15</td>
<td>17</td>
<td>20</td>
</tr>
<tr>
<td>3. Slaughterhouse Implemented GAP (Location)</td>
<td>25</td>
<td>50</td>
<td>75</td>
<td>100</td>
<td>125</td>
</tr>
</tbody>
</table>

This Programme supported by 10 Sub-Programmes and implemented by Department of Animal Health and Production and Provincial Departments of Agriculture.
Programme-3: Sustainable Fisheries Resources Management

Objective of Programme-3:

“To increase the fisheries resources protection and conservation efforts by effective law enforcement, eliminating all types of illegal fishing activities, strengthening fisheries management capacity for 100 Fisheries' Communities annually and promoting the aquaculture development by 15% per annum for ensuing the sustainable fisheries resources and to improve the quality and safety of fishery products for domestic uses and export”.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Unit</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Aquaculture Production</td>
<td>000' Ton</td>
<td>120</td>
<td>144</td>
<td>172</td>
<td>207</td>
<td>250</td>
</tr>
<tr>
<td>2. Capture Fisheries Production (Inland and Marine)</td>
<td>000' Ton</td>
<td>600</td>
<td>600</td>
<td>600</td>
<td>600</td>
<td>600</td>
</tr>
<tr>
<td>3. Rate of processor improved quality and safety fishery products</td>
<td>%</td>
<td>5</td>
<td>10</td>
<td>15</td>
<td>20</td>
<td>25</td>
</tr>
</tbody>
</table>

This Programme Supported by 11 Sub-programmes and Implemented by Fisheries Administration
2. Agricultural Sector Development Strategic Framework

Programme Approaches to Achieve Policy Goal

Programme-4: Sustainable Forestry and Wildlife Resource Management

Objective of Programme-4:

“To strengthen the sustainable management of forestry and wildlife through law enforcement, promoting reforestation at least 25,000 ha per year; create the protected forest and wildlife conservation with 50,000 ha per year; and establish 32 forestry communities per year”

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Unit</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Protected and Wildlife Conservation Areas</td>
<td>Million Ha</td>
<td>1.55</td>
<td>1.60</td>
<td>1.65</td>
<td>1.70</td>
<td>1.75</td>
</tr>
<tr>
<td>2. Reforestation</td>
<td>Ha</td>
<td>20,280</td>
<td>22,300</td>
<td>24,500</td>
<td>27,000</td>
<td>29,700</td>
</tr>
<tr>
<td>3. Forestry Communities Established and Strengthened</td>
<td>Number Community</td>
<td>489</td>
<td>520</td>
<td>550</td>
<td>570</td>
<td>600</td>
</tr>
</tbody>
</table>

This Programme Supported by 8 Sub-programmes and Implemented by Forestry Administration.
2. Agricultural Sector Development Strategic Framework

Programme Approaches to Achieve Policy Goal

**Overall Policy Goal:**

“Increase agricultural growth around 5% per annum through enhancement of the agricultural productivity, diversification and commercialization and livestock and aquaculture farming, by taking into account sustainable forestry and fisheries resource management”

**Programme-5:**

*Strengthening Institutional Capacity, Enhancing Efficiency of Supporting Services and Human Resource Development.*

**Objective of Programme-5:**

“To increase the effectiveness of institutional management, service delivery, and strengthen the capacity for agricultural education and training for the sustainable agricultural development”

This Programme supporting by 13 Sub-programmes and implementing by (1) Department of Planning and Statistics (2) Department of Accounting and Finance (3) Department of Personnel and Human Resource Development (4) Department of Internal Audit (5) Department of International Cooperation (6) Department of Agricultural Legislation (7) Department of Administrative Affairs (8) Agricultural Information and Documentation Center (9) General Inspection (10) Royal University of Agriculture (11) Prek Leap National Agriculture College (12) Kampong Cham National Agriculture College and (13) Provincial Departments of Agriculture.
3. Strategic Framework for Climate Change

The Strategies:

- To ensure food security and farmers' livelihood improvement through an increase of crop production, agro-industrial at 10% per year. To enhance development, the use of appropriate technology, renewable energy, the effective use of water, adaptation and mitigation.

- To increase livestock product with 3% per year through health system improvement, and to reduce emission from animal waste.

- To enhance sustainable forest management through reforestation and reduce emission through forest degradation and deforestation, to obtain carbon credit, to enhance local community whose livelihood depending on forestry, and to regain 60% forest cover by 2030.

- Enhance management, conservation and development of fishery resource in sustainable way through capacity building and actively participating in dealing with climate change impact at local level, national and Mekong flood plain.
### 3. Strategic Framework for Climate Change

#### Priority Actions: Agriculture

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Promoting and scaling-up sustainable farming system that resilient to climate change</td>
</tr>
<tr>
<td>2</td>
<td>Develop crop variety suitable to AEZ resilient to CC (include coastal zone).</td>
</tr>
<tr>
<td>3</td>
<td>Promote research work on appropriate technology responding to climate change in Agricultural sector</td>
</tr>
<tr>
<td>4</td>
<td>Development of knowledge and information system on climate change</td>
</tr>
<tr>
<td>5</td>
<td>Promote appropriate technology/techniques that reduce GHG</td>
</tr>
<tr>
<td>6</td>
<td>Institutional Capacity Development for natural disaster coordination and intervention</td>
</tr>
<tr>
<td>7</td>
<td>Strengthening capacity of Agricultural and agro-industry development entrepreneur and the agricultural cooperative in low emission development.</td>
</tr>
</tbody>
</table>

#### Priority Actions: Livestock

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Promoting resilience in animal production and adaptation to climate change (technical package)</td>
</tr>
<tr>
<td>2</td>
<td>Enhancing animal waste management and climate change emission mitigation</td>
</tr>
<tr>
<td>3</td>
<td>Promoting and enhancing technology development on the improvement of animal breed, animal feed, and animal health to adapt climate change.</td>
</tr>
</tbody>
</table>
### 3. Strategic Framework for Climate Change

#### FORESTRY

1. Promoting sustainable forest management
2. Promoting reforestation and afforestation to increase carbon stock
3. Conducting capacity development, research and awareness raising on REDD+
4. Developing and implementing regulations and mechanism on REDD+
5. Building climate resilient capacity in forestry sector

#### FISHEREY

1. Promoting aquaculture production systems and practices that are more adaptive to climate change
2. Promoting climate resilience of wild fishery resources.
3. Enhancing the climate resilience in fishery sector (ECRF)
4. Establishing GHG inventory and accounting system in fishery sector
5. Enhancing fish and fisheries products in the entire value chain in response to climate change impacts
Thank you
From the perspective of Agri-food Value Chains and Food security, Rural Restructuring – Supporting Productivity and Competitiveness

Presented by Dr. Zhang Yun
National Focal Point of P.R. China
Foreign Economic Cooperation Center, MOA
Food Security Situation in China

**In terms of the food industry chain**

- food production, farmers’ income, processing and trade, market circulation and consumer price segments are basically in a better operating state

**In terms of the food stakeholders**

- the relationship between the country and farmers, country and food supply companies, farmers and companies, the Central government and local governments are relatively harmonious now.

**In terms of national and international comparison**

- The supply and demand of three major staple food grains (rice, maize and wheat) keeps balanced.
- Year 2014, 607 million tons
Grain Yield in 2010-2014, China

('0000 tons)

Challenges:

• Self-sufficiency rate of grain is roughly 97%
• Structural imbalance in the grain production
• Food consumption structure upgrading,
• Climate change, etc.
Food Security Policy in China

- One basic objective: **To feed China mainly by ourselves**
  - based on domestic, ensure production capacity
  - moderate imports
  - rely on science and technology
  - focus more on the quality and quality safety
  - focus more on the sustainable development
Policy measures and highlights of Agriculture

- **Improve the overall production capacity**
  - land protection, superior grain industry projects
  - Agriculture strengthening policy system

- **Ensure the farmers’ basic benefits**
  - Two-level reserve controlling system, price support, direct subsidies

- **Both production and consumption**
  - promote the development of grain industry supervision of grain

- **Uniform and efficient circulation system**
Optimizing the value chains, Rural Restructuring – Supporting Productivity and Competitiveness

- Investment & Financial support
- Agriculture Restructure
- New-type Operators
- Modern circulation system
- Intensifying socialized service
- Integrated development
First ensuring the investment in agriculture and rural areas

- farmers’ income increase, rural significant reform, agricultural infrastructure construction, agricultural restructuring, sustainable agricultural development, increasing subsidies, especially “green box”

Deeply advancing the agricultural restructuring

- promoting the harmonious development of grain, cash crops, and forage grass and feed, Improving the benefit compensation mechanism and supporting the development of animal husbandry and grain processing industries in major grain producing areas

Building a new-type agricultural operation system

- dominant position of farmer households in agricultural operation, developing moderate-scale and industrialized operation,
- supporting new-type holders such as large planting households, family farms, leading enterprises and farmer cooperatives,
Innovating in the circulation mode of agricultural products

- market upgrade, facility construction and supporting service, agricultural product market in producing areas, cross-regional cold-chain logistics system, supporting e-commerce

Intensifying socialized agricultural service

- Focus on the support to such services as helping others plow and harvest, uniform prevention and control, drying and storage, boosting grass-root agricultural technology extension organizations for public welfare

Promoting the integrated development of the primary, secondary and tertiary industries in rural areas

- Developing unique planting and breeding industries, agricultural product processing industry and rural service industry, exploiting the multiple functions of agriculture, digging into the value of countryside ecological resort, tour and sightseeing, culture and education.
Experience on quality safety and food safety

- regulatory capacity building in counties and townships
- Strict management of the agricultural inputs, promoting the standardized production of agriculture.
- Granting subsidies to quality safety inspection and testing costs in key agricultural bases and wholesale markets.
- Food safety information platform, whole-course traceability.
- Performing agricultural product quality safety county and food safety city creating campaign.
- Improving the overall coordination system for food safety supervision, intensifying the statutory duties of local governments.
Thank You !
PRC Policy and Strategy on Sustainable Agriculture

Shen Yueming, NSS PRC

25 June 2015
National Sectoral Context

Q1 2015, National GDP growing by 7.0%, agriculture 3.2%.

Priority given to speeding up the transformation of the agricultural growth model and ensuring that agriculture is stronger, people in rural areas are better off, and rural China is more beautiful. Work is planned to/on:

- Maintain and enhance the quality of cultivated land, improving rural land and developing water-efficient agriculture.
- Develop and expand the use of new technology, new crop varieties, and new agricultural machinery.
- Comprehensive solution of problems such as residual traces of chemicals in agricultural products and livestock shipments so as to improve the quality and safety of all agricultural products.
No. 1 Central Document

Issued on Feb. 1, 2015, China’s “No. 1 Central Document”, the first policy document jointly released by the Central Committee of the Communist Party of China and the State Council, once again focuses on the agricultural sector.

Among 4 key topics discussed, it stressed the “key challenge” of guaranteeing the effective supply, quality and safety of agricultural products, and to improve sustainability of agricultural development under resources and environment restraints.

CASP 2 themes and pillars are in line with the national priority and are helping address the “key challenge” in Yunnan and Guangxi.
National Plan of Sustainable Agri-Devlpmt

On 27 May 2015, the “National Plan of Sustainable Agricultural Development (2015-2030)” was jointly released by MOA, NDRC, MOST, MOF, MLD, MEP, MWR, SFA.

Considering factors including carrying capacity of agricultural resources, environmental capacity, ecological types and development status, the plan divides the country into 3 zones:

- **Optimized Development Zone**
  - Prioritize production and combine crop farming with livestock raising, taking the requirement of ecological progress into account, so as to realize production stability, resource sustainability and environment-friendliness

- **Moderate development zone**
  - Lay equal stress on protection and development, and use resources in a moderate, intensive, economical and orderly manner

- **Protected development zone**
  - Prioritize protection, restrain development, moderately develop eco-industries and specialty industries, and promote the benign circulation of the eco-system.
Guangxi and most part of Yunnan fall into the moderate development zone.
Priorities for agricultural sustainability

1. Optimize development layout and stably improve agricultural productivity.
   • Optimize the layout of agricultural production
   • Strengthen agricultural productivity
   • Promote the development of ecological circular agriculture

Highlights:
• By 2020, agricultural science and technology advancement contribution rate surpassing 60%;
• comprehensive mechanization level for main crops surpassing 68%,
• national modern agricultural demonstration zones and major grain producing counties realizing circular utilization of agricultural resources within the zone/county;
• by 2030, the whole country realize nearly zero emission of agricultural wastes.
Priorities for agricultural sustainability

2. Protect cultivated land resources and promote sustainable use of farmland.
   - Stabilize acreage of arable land
   - Improve quality of arable land
   - Return farmland to forest and grassland according to national plan.

Highlights:
- Ensure 1.8 billion mu (120 million ha.) of arable land;
- No less than 1.56 billion mu of basic farmland;
- Control heavy metal pollution in farmland;
- Establish soil classification system to manage usage of soil according to different agricultural products and different levels;
Priorities for agricultural sustainability

3. Saving water and guarantee agricultural water security
   - Mange water resources according to the control line
   - Promote Water-saving irrigation
   - Develop rain-fed agriculture

Highlights:
- By 2020, maintain 372 billion cubic metres of irrigation water nationwide
- Coefficient ratio of using farmland irrigation water at 0.55
- Newly developed efficient water-saving irrigation area of 288 million acres by 2020;
Priorities for agricultural sustainability

4. Treat environmental pollution and improve agricultural and rural environment
   • Prevent and control farmland pollution
   • Comprehensively control pollution from livestock and fish farming
   • Improve rural environment

Highlights:
- zero increase of fertilizer and pesticide application by 2020
Priorities for agricultural sustainability

5. Rehabilitate agro-ecology and improve the ecological function.

- Enhance ecological function of forestry
- Protect grassland ecology
- Rehabilitate aquatic ecosystem
- Protect bio-diversity
谢谢！THANK YOU!
Agriculture and forestry Development Plan 5 year

(2016 – 2020)
Outline

I. Reference

II. Target & goal

III. Program & Project of Agriculture and forestry Development Plan 5 year (2016 – 2020)
1. Reference of the Agriculture and forestry Development 5 year Plan (2016 – 2020)

- Prime Minister’s Decree No 24/PM, dated 7/5/2014
- MPI’s Decree No 2028/mpi, date 2/9/2014
- Agricultural Strategy 2025 Vision 2030,
- Forestry Strategy 2020
- National Program on Rice Production to food security and Livestock and Fishery commodity project.
1. Target & Gaol of the Agriculture and forestry Development 5 year Plan (2016 – 2020)

# There are 3 Gaol: 1) Food Security; 2) Commodity Production; 3) Forest Management

# Overall Target:

- Agriculture & Forestry increase average 3.4%, cover 19% of GDP
- Rice production to be reached 4.7-5 M.t, (sticky rice is 70% and general rice 30%), Meat and egg production – 258,000 tons, and Aquatic – 229,500 tons, meat, fish and eggs for consumption average 65 kg / person / year

Gaol I: Food Security

- to ensure the nutrition security with people get 2.600-2.700 kcal/person/day.
- Rice for food security of approximately 2.5 million tons this:
  - Rice for domestic consumption: 2.1 M.tons.
  - Rice Reserves stock 400,000 tons/year.
  - Rice for Domestic processing 600,000 tons/year.
  - Rice for seed production 100,000 tons/year.
1. Reference, Target & Gaol of the Agriculture and forestry Development 5 year Plan (2016 – 2020)

**Gaol II: Agricultural Commodity Production**
- Expected export rice is about 1 to 1.5 million tone
- Production on agriculture, livestock - fisheries, NTFP that potential production on developing agriculture as clean (safe) and sustainable to be riches industrialization and modernization.
- To exports in safe standard agricultural production (GAP) and organic agriculture (OA)

**Gaol III: Forest Management**
- Forest cover to 70% in this
- Allocation of production forest and restore forest 170,000 ha
- To create Certified forest areas to 30% of total production forest.
- Promote industrial plantations to 150,000 hectares.
  allocate plan and manage village forest to 1,500 villages
3. Program & Project of Agriculture and forestry Development Plan 5 year (2016 – 2020)

# There are 10 Programs such as:
1) Food Production Program
2) Commodity Production Program
3) Forestry Development Program
4) Sustainable Producing Patterns Allocation and Rural Development Program
5) Agriculture and Forestry Infrastructure Development Program
6) Land Development and management Program
7) Agricultural. and Forestry Research Program
8) Service and extension on agriculture and forestry
9) Protection and overcome from effects of disasters Program
10) Human Resources Development Program
3. Program, Projects of Agriculture and forestry Development Plan 5 year (2016

I. Food Production Program
   1) National rice production for Food security project.
   2) Development of large animal raising in mountainous and plateau area project.
   3) Lao buffalo raising development and expansion project.
   4) Survey for animal and fish production development in the focal agro-irrigation area project.
   5) Clean agriculture development (9 projects) and other

II. Commodity Production Program
   1) Rice production for export project.
   2) Commercial crop production for export project (coffee, hard corn, cassava, banana, …).
   3) Producer’s group and cooperative development promotion project.
   4) Agriculture business development promotion project. project.
   5) Commercial animal raising and fishery support [and] promotion and other project. project.
3. Program, Project of Agriculture and forestry Development Plan 5 year Development Plan 5 year (2016 – 2020)

III. Forestry Development Program
1) Sustainable forest production project.
2) Production and restore forest extension project.
3) National Conservation forest project.
4) Development and management village forest project.
5) and other

IV. Sustainable Producing Patterns Allocation and Rural Development Program
1) Upland Agriculture Development project.
2) Integrated development project.
V. Agriculture and Forestry Infrastructure Development Program  
1) Irrigation development projects.  
2) Agriculture technical extension center and station development projects.  
3) Testing and experiment infrastructure development projects.  
4) Plant laboratory that meets ISO 17025 establishment and development projects.

VI. Land Development and management Program  
1) Legislation development project for plantation land management. project.  
2) Survey project, production zoning and agriculture land development. project.
VII. Agricultural and Forestry Research Program
1) Production and post-harvest technique research projects
2) Rice variety research and production project.
3) Economic plant variety research and production project (hard corn, cassava, coffee, banana, ...).
4) Vegetable and fruit tree variety research and production project.

VIII. Service and extension on agriculture and forestry Program
1) Farmer registration project.
2) Targeted commercial crop plantation for export farm registration project.
3) Crop production input management project (plant varieties, fertilizers and pesticides) project.
4) Post-harvest technical tools and machinery development project.
5) Medicine production and veterinary extension promotion project.
IX Protection and overcome from effects of disasters Program
1) Plant production loss reduction from natural disaster project.
2) Animal disease, fish and aquatic animal diseases surveillance project.

X. Human Resources Development Program
1) Animal disease laboratory strengthening at the central level project.
2) Specialist strengthening project.
Thank you for your attention
12th Annual Meeting of the Working Group on Agriculture

Country Strategy and Policy for Agriculture Sector Development in Myanmar

25-26 June 2015
Bangkok, Thailand

Thanda Kyi
Director and National Focal Point
Department of Planning
Ministry of Agriculture and Irrigation
The Republic of the Union of Myanmar
Outline

• GMS-WGA cooperation
• Vision
• Rice Sector Development Strategy
• Zero Hunger Challenge
• Priority Issues
• Conclusion
GMS-WGA Cooperation

“Recognized as a leading producer of safe food using climate friendly agricultural practices and is integrated into global markets”

- ADB shifted strategic focus from agriculture to a comprehensive multi-sector food security engagement

- CASP II in line with three dimensions of:
  - Improved productivity
  - Enhanced connectivity
  - Improved resilience
• A competitive, inclusive, resilient and sustainable Food, Agriculture, and Forestry (FAF) sector integrated with the global economy, based on a single market and production base contributing to food and nutrition security and prosperity in the ASEAN Community
A competitive, inclusive, resilient and sustainable Food, Agriculture, and Forestry (FAF) sector integrated with the global economy, based on a single market and production base contributing to food and nutrition security and prosperity in the ASEAN Community.


ASEAN Multi-Sectoral Framework on Climate Change: Agriculture and Forestry towards Food Security (AFCC) (2016 – 2020)

Food Safety related Measures & Guidelines, etc.,

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1. Vision of ASEAN Cooperation in Food, Agriculture and Forestry towards 2025 was developed by Ad-hoc Task Force for Food, Agriculture and Forestry (ATF-FAF) which will be submitted to 37th AMAF in 2015 and will be endorsed by 38th AMAF in 2016.
2. AIFS Framework & SPA FS and AFCC were endorsed by 36th AMAF in Myanmar in 2014.
Current Agriculture Sector Development Plans

- National Five Year Short Term Plan (2011-2012 to 2015-2016)
- National Comprehensive Development Plan (NCDP) 2011-2012 to 2030-2031)
- National Adaptation Programme of Action (NAPA) to Climate Change (First priority adaption projects for implementation in Myanmar are agriculture, early warning systems and forest sector)
- Myanmar Action Plan for Disaster Risk Reduction (MAPDRR) has been published by Ministry of Social Welfare, Relief and Resettlement with the support of ADPC in 2012
“Securing Sustainable Food and Nutrition Security System”
Key Factors for Increasing Agricultural Products

1. To get *Sustainable Market*,
2. To establish *Seed Industries*,
3. To apply *Good Agricultural Practice (GAP)*,
4. To give awareness of farmers encouraging use of *inputs*,
5. To establish *Agro-based Industry*, and
6. To reduce *Production Cost & Transaction from Seeding to Market*
Securing Sustainable Food and Nutrition Security System in Myanmar


Agriculture Outlook

✓ 31.4% of GDP in 2013-14 (including crops (22.5%), livestock & fisheries (8.5%) and forestry (0.4%))

✓ 61.2% of Labor Force

✓ 30.5% of Export Earnings (crops (19.8%), livestock & fisheries (3.9%) and forestry (8.13%))

✓ 70% employed in agriculture, livestock and fishery sector for their livelihood

✓ 2.21 hectares of average land holding small scale farmers

✓ > 60 different crops including both tropical and temperate varieties can be grown

✓ Rice is a major or national crop of Myanmar

✓ Sown area - 7.28 million ha; production 28.32 million MT; average yield - 3.90 MT/Ha (2013-2014)

✓ Pulses is standing as a leading country in pulses

Source: DAP, 2014
Policy guidance from H. E the Union Minister
The GOM has placed agricultural development as one of the key pillars towards achieving economic development.
The vision of Regional and Myanmar Rice Sector

**Regional**

“Food-secure, better-nourished and prosperous rice farmers and consumers in the Asia-Pacific region who benefit equitably from a vibrant, innovative and transformed rice sector that is more productive, efficient and environmentally sustainable by 2030”

**Myanmar**

“Food-secure farmers and consumers enjoying the economic benefits provided by a transformed, dynamic, and internationally competitive rice sector that produces rice using sustainable farming practices and effective resource management by 2030”
Actions to achieve the Vision by 2030

Three main actions suggested to achieve the Vision;

- Increase investment in capacity building, research and development and extension
- Increase investment in rural infrastructure
- Institution and policy reforms and innovations
Rice Value Chain

Legend
- National component
- National & international component
- International component

Inputs
- Pesticides
- Farm machinery
- Fertilizers
- Equipment
- Fuel
- Land
- Seeds
- Water
- Labor
- Finance

Storage
- Farmers
  - land preparation
  - planting
  - weeding
  - harvest
  - storage
- Brokers
  - Millers, large
    - unbroken milled rice
    - broken rice
    - bran
    - husks
  - Millers, small
    - unbroken milled rice
    - broken rice
- Licensed traders

Producers of:
- rice noodles
- bran oil
- rice alcohol
- husk bricks for fuel

Support services
- MOAI-Seed, training, finance, R&D, irrigation, warehousing
- MADB and other banks-Agricultural loans
- MOF-Financial regulation
- MITS-Inspection, testing, and certification
- MOT-Ports and airports
- MRF and constituent associations-Matchmaking, training, seminars
- UMFCCCI-Certificates of origin, B2B meetings, trade fairs
- MIC-Investment approvals
- DICA-Company registration and investment promotion
- MOR-Roads

Producers of:
- animal feed
- rice vermicelli
- sweet sticky paste

Retailer

National buffer stock
- Crop exchange centres
- Wholesaler

Domestic market

China, Thailand, Bangladesh
- Border trader/wholesaler
- Processor
- Retailer

Ivory Coast, S. Africa, other SSA
- Importer/wholesaler
- Processor
- Retailer

Russia
- Importer/wholesaler
- Processor
- Retailer

Philippines, Indonesia, Malaysia
- Importer/wholesaler
- Processor
- Retailer

Belgium, Singapore
- Importer/reexporter
- Processor
- Retailer

Ref: Tin Maung Shwe (Seed Industry Development)
Good Agricultural Practices in Rice