

**Voluntary Report** – Voluntary - Public Distribution

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**Report Name:** Soybean Utilization in Burma

**Country:** Burma - Union of

**Post:** Rangoon

**Report Category:** Agricultural Situation, Oilseeds and Products

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**Report Highlights:**

This report provides an overview of soybean production and consumption, as well as opportunities for soybean exporters, in Burma. Domestic production supplies most of food and edible oil demand. Imports of soybean meal represent the bulk of soybean use for feed.

## Summary

Soybeans are a major protein source in food and animal feed in Burma. Burmese food producers primarily rely on domestically produced soybeans to make local soy food products, such as tofu, soymilk, soy paste, soy sauce, and snacks. Burmese feed millers tend to rely on imported soybean meal and domestic soybean cakes for the protein component of animal feed. There are some imports of food-grade soybeans to produce soymilk.

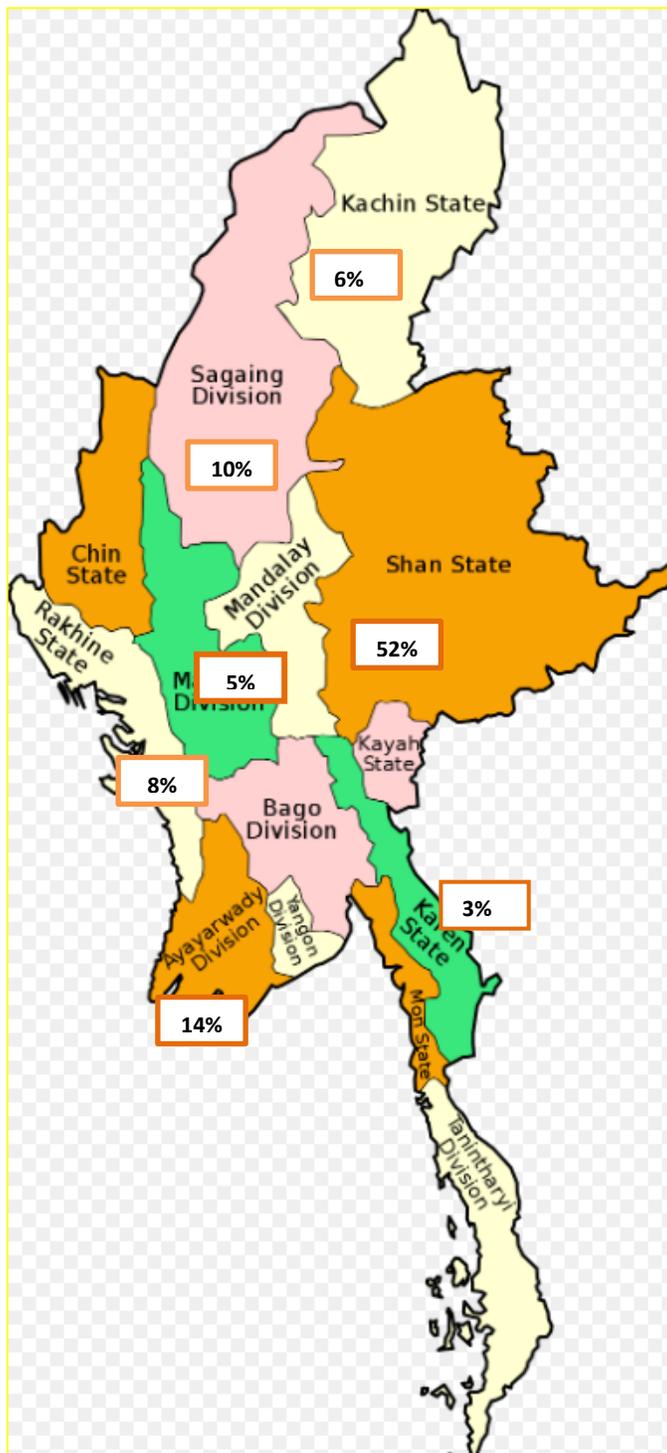
## I. Production

The Department of Agriculture estimates Burma's annual soybean production at 200,000-230,000 metric tons (MT) from 131,000-150,000 hectares a year with the average yield at 1.5 MT per hectare (MT/Ha). The highlands of Shan State<sup>1</sup>, and Ayeyarwady, Mandalay, Sagaing and Bago regions are the primary soybean cultivation areas in Burma (Figure 1). The crop calendar for soybean planting varies based on location (Table 1). In Shan State, farmers typically intercrop soybeans with corn and sunflowers. Farmers plant soybeans near river basins after water has drained. Over the past decade (Figure 2), Burma's soybean production has gradually decreased as farmers' interest waned due to the (i) emergence of more promising crops, (ii) lack of domestic demand for soybean oil, (iii) lack of modified oil crushing machines to remove the beany flavor of soybeans, (iv) inadequate access to production technologies, including appropriate seed varieties for the country's different agro-climatic zones and seasons, and climate change, (v) ineffective pest and disease control, including uninformed input management, and (vi) insufficient weed control and postharvest operations, including storage facilities. Environmental factors, such as drought during the growing season, and frequent and prolonged rains, and socioeconomic constraints (e.g., high production costs for fertilizer, insecticides, scarcity of farm labor) have also impacted Burma's soybean production. The Department of Agriculture estimates 2023 domestic soybean production was 192,000 MT with a yield of 1.5 MT/Ha.

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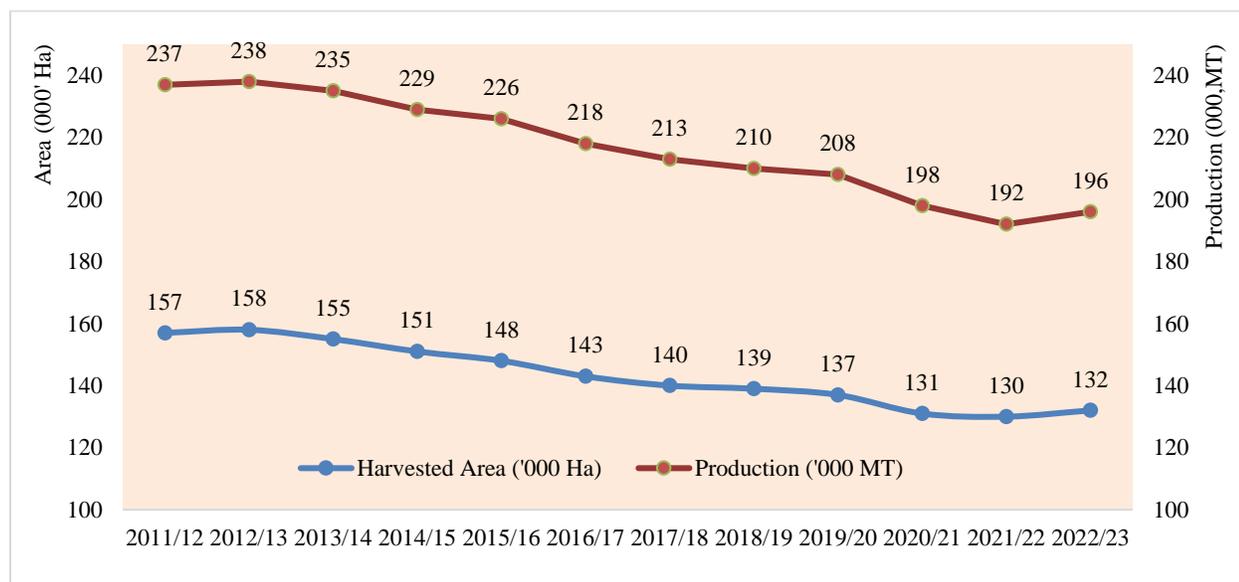
<sup>1</sup> Burmese administrative subdivisions include 7 regions (Ayeyarwady, Bago, Magway, Mandalay, Sagaing, Tanintharyi and Yangon), 7 states (Chin, Kachin, Kayah, Kayin, Mon, Rakhine, and Shan), as well as 1 union territory (Naypyidaw), and self-administered division and zones.

**Figure 1. The Proportion of Domestic Soybean production in 2023 by Administrative Area**



Source: Myanmar Department of Agriculture

**Figure 2. Burma's Soybean harvested areas and production.**



Source: Myanmar Department of Agriculture

**(a) Sowing Time and Crop Calendar:**

Sowing times for soybeans vary across different regions in the country and seasons (Table 1). Shan State has a wide range of different agro-climatic areas and soybeans are planted before the monsoon season (with irrigation), and as early and mid-monsoon crops.

**Table. 1. Soybean Crop Calendar in Burma**

Location	Growing Season	Sowing	Harvesting
Shan State (flat land)	Pre-monsoon (Dry season)	January-February (Irrigation)	April- May
Shan State (up land, hilly areas)	Early monsoon	May- June	August - September
Shan State	Mid monsoon	August- September	November-December
Kachin State	Post monsoon	December	April
Riverine region	Post monsoon	October- November	January-February
Ayeyarwady Region	Post monsoon	October- November	January-February

Source: Department of Agricultural Research

Note: Pre monsoon: mid-May-mid-June  
 Monsoon Season: mid-June -September  
 Post monsoon: October-November

**(b) Soybean Varieties:**

In recent years, Burmese farmers have planted 22 soybean varieties across the country. While producers near Chinese and Thai borders tend to rely on seeds informally imported from these neighboring countries, Burmese farmers in other areas receive their soybean seeds from the Department of Agricultural Research (DAR), which releases Yezin varieties. According to the

DAR, the Yezin varieties (e.g., Yezin 2, Yezin 6, Yezin 14, Shan Sein, Ahtwet toe and Theikpan) are the most popular. DAR's soybean variety development prioritizes yield, early maturity, high protein and suitable oil content, yellow seed coat color, as well as pest and disease resistance. Burma's Department of Agriculture provides soybeans farmers with technical assistance, but offers no financial incentives or subsidies.

## **II. Consumption**

### **(a) Food**

The most common soy-based food products in Burma include soy sauce, soy milk, soybean curd, tofu, dried and salted soybean flakes, fermented and preserved wet soybean paste and soybean oil. Dried and salted soybean flakes are a traditional food for Shan and Paoh ethnic groups. Demand for domestically produced soybean oil is limited as consumers dislike the beany flavor and relatively high prices of domestically crushed soybean oil. Domestically crushed soybean oil is sold exclusively for at-home consumption and not under a brand name. There is a strong demand for imported soybean oil, which is attributed some health benefits. Although some oil crushers in Burma want to increase soybean oil production, the capacity of crush facilities in Burma cannot meet the demand.

Soy sauce is a staple ingredient widely consumed in Burma. Local soy sauce manufacturers tend to use domestic soybeans, but most of Burma's soy sauce demand is supplied by imports of soy sauces from China, Thailand, Korea, and Indonesia. In 2022, Burma imported nearly 4,000 MT of soy sauce.

Soy milk market is quite limited as Burmese consumers prefer cow milk due to the beany flavor of soy milk. In 2018, Europe and Asia Beverage Company Limited (EABC) entered the Burma market and began to produce different Vito Myanmar soymilk flavors, including classic, strawberry, and chocolate. The company, which is the only soybean importer to produce soymilk, uses Canadian soybeans. In 2022, Burma imported 1,287 MT of soybeans from Canada. Despite interest by some local food processors in sourcing imported soybeans to produce safe and high-quality soy milk, tofu, soy sauces and other soy-based products, insufficient food safety understanding coupled with a limited access to trainings and appropriate technologies severely impedes the development of this sector in Burma. There is no reliable consumption survey for soy products in Burma.

**Figure 3. Examples of soy products in Burma**



Dry and salted Soybean flakes



Fermented soybean



Rosted soybeans (eaten as snacks)



Soy milk



Soybean curd (tofu)



Spicy fermented soy paste



Light Soy sauce



Dark Soy sauce



Fermented Preserved Wet Soybean Paste packed with “leaves” in a traditional Style



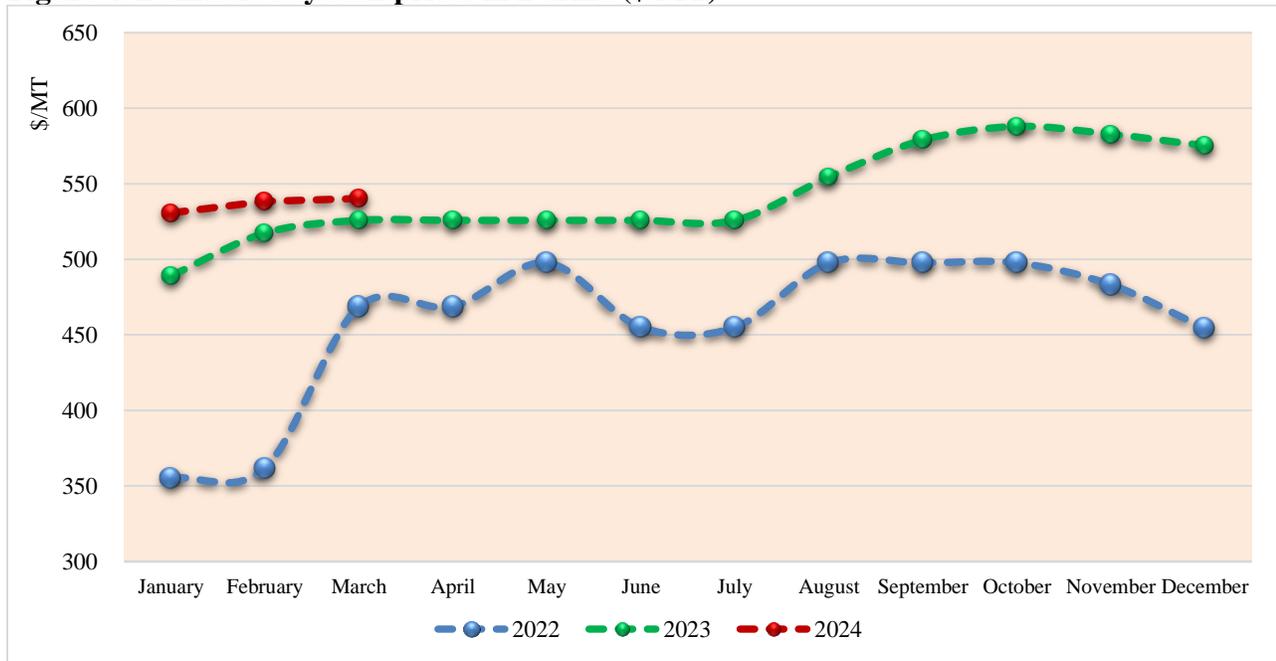
Soybean cake (for feed)

**(b) Feed**

Soybean meal is a major feed ingredient for livestock and aquaculture production in Burma. It comprises 5-30% of feed rations for poultry, swine and aquaculture. Industry sources estimate Burma's annual soybean meal demand for feed at 500,000-600,000 MT. This demand is met entirely through imports. Domestic soybean cake production can only supply the raw feed demand in areas close to production sites and offers a different nutritional profile than imported soybean meal.

Through a series of trainings between 2012 and 2020, the U.S. soy industry developed awareness and appreciation for U.S. soybean meal among livestock and aquaculture producers and feed millers in Burma. There is particular interest in high protein not genetically engineered U.S. soybean varieties to produce soybean meal. Nevertheless, the cost of the U.S. soybean meal remains a concern for feed millers in Burma. In addition to soybean meal, some livestock producers in Burma also utilize soybeans as full-fat feed for livestock.

**Figure 4. Domestic Soybean prices in Burma (\$/MT)**



Source: etrademyanmar.com  
 Exchange rate: \$1 =3,600 Myanmar Kyat (March 2024)

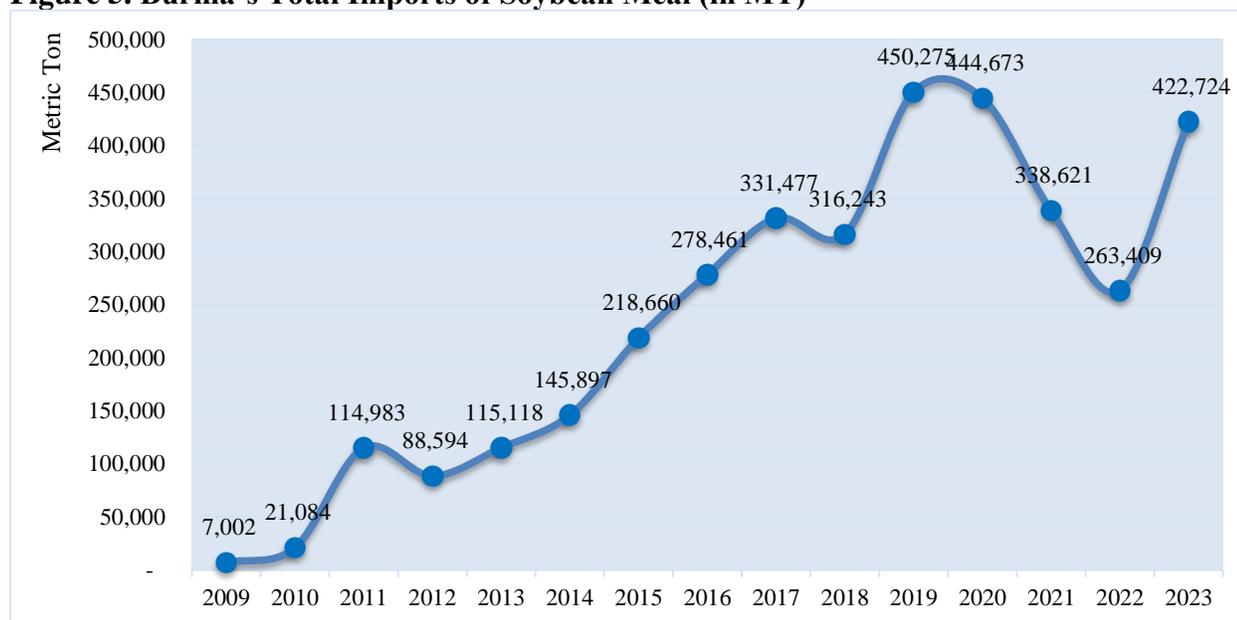
### III. Trade

#### (a) Import

Following the COVID-19 outbreak and the military coup, Burma’s livestock sector shrunk, and soybean meal imports dropped between 2020 and 2023 (Figure 5). Although Burma lists soybean meal as a priority in its list of priority imports, complex and inconsistent import regulations, unstable foreign currency exchange rates, and high global prices have hindered imports of soybean meal.

Burma mainly imports soybean meal from Argentina, Malaysia, Paraguay, the United States, Brazil, India, and Bolivia. Since 202/22, Burma’s imports of U.S soybean meal primarily transshipped through Thailand or China to facilitate logistics, including import license applications, and reduce costs.

**Figure 5. Burma's Total Imports of Soybean Meal (in MT)**



Source: Trade Data Monitor

Note: import volume is based on calendar year (January- December)

### (b) Export

Burma exports a small volume of soybeans to China, India, Thailand and Taiwan. Most soybean exports from Shan State were shipped to China via a land border. The dramatic drop in export volumes in FY 2021/2022 (Table 2) corresponded to border closures due to the COVID-19 pandemic.

**Table 2. Burma's Soybean Export**

Financial Year	Months Included	MT	\$ million
2017/18	October-September	2,019.55	1.02
2018 (Mini budget)	October-March	968.13	0.48
2018/19	April-March	6,386.24	2.74
2019/20	April-March	15,688.73	6.67
2020/21	April-March	6,176.16	3.65
2021/22	April-March	411.00	0.30
2022/23	April-March	223.50	0.21
2023/24	April-March	228.73	0.20

Source: Department of Planning, Ministry of Commerce

Note: In 2018, Burma changed its fiscal year from October-September to April-March.

#### **IV. Opportunities and Challenges for U.S. Soybeans**

Post sees the most growth potential for U.S. soybeans in the food sector, which is still largely supplied by domestic production. The Myanmar Soy Development Group (MSDG) has tried to foster soy food production and consumption in Burma and has worked with the U.S. industry to grow demand. Some of the immediate challenges to expanding demand include a lack of awareness by consumers in Burma of the health and nutritional benefits of soy foods, and poor food safety and quality standards in domestic food manufacturing facilities.

Burma currently has no regulations for genetically modified (GM) crops, but Burma's National Seed Policy restricts imports of GM crop for food. For cultivation, Burma seeks good quality conventional (non-genetic modified organism (non-GMO)) soybean varieties for farmers in southern Shan State.

To stem the outflow and shortage of foreign currency (US\$), the junta tries to limit imports and encourages domestic soybean production. Nonetheless, soybean meal continues to be the top U.S. export to Burma.

#### **Attachments:**

No Attachments.