Myanmar Food and Beverages 2018: Strategic Directions and Scenarios for Myanmar's Markets and Industry

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On 8th February 2013, we will be publishing the latest report in our long running Asia Pacific Food Insight Series titled: “Myanmar Food and Beverages 2018: Strategic Directions and Scenarios for Myanmar's Markets and Industry”.

Stanton Emms Strategy Consultants (formerly Stanton, Emms & Sia) is a strategy and business development consultancy that specialises in assisting food, drink and agrifood clients with their business and marketing strategy development in the East Asian region. We have been assisting clients with their strategic research and business consultancy requirements in the region since 1991. We have been actively working for clients in Myanmar (Burma) arena since 1994.

Myanmar (Burma) is a food surplus country at the level of basic foodstuffs

Although a poor country (Population: 60 million persons) with a very low GDP per capita of around US$ 425 (nominal basis) and some food security challenges in 2011, Myanmar (Burma) is defined as one of the world’s “food surplus” countries. It produces between 55 and 60 million tonnes of agrifoods per annum. Agriculture is very important to Myanmar’s economy, because around 70% of its population depends on the sector for their incomes and food supplies.

In terms of basic foodstuffs, Myanmar is only short of edible oils today. This is dealt with through high volume imports of palm oil from its ASEAN (Southeast Asian) trading partners, and a policy of expanding its own palm oil production. It is the world’s second largest exporter of dry beans, peas, pulses and lentils and also exports fish and seafood, which are currently surplus to its own demand requirements. It is also exporting some rice under a government policy that is promoting growth in rice production related to exports.

Myanmar has two economies that underpin its consumer market

Myanmar’s has two economies, one traditional or government (State) linked, which is underpinned by very low disposable incomes and inefficiencies, the other, linked to manufacturing, which is more dynamic and includes a sizeable and growing export-oriented sector. This sector includes both private and some government linked businesses.

While there is very little information on the true state of employment in Myanmar, economic analysts believe that the country’s middle income consumers are mainly linked to the manufacturing industry. The upper income group, i.e. business owners and managers, are also linked to this sector.
Some of these business owners and managers are also government officials, albeit that this may not be public information.

Based on available information from the government and trade, these analysts believe that about 1.2 million persons are employed in industry. Taken together with the trickle-down effect of these persons’ incomes to their extended families, it is believed that the middle income group and the fringe of lower income consumers, now number between 5 and 6 million persons today, with the upper income group within this group likely numbering around 500,000 persons.

Based on this, the likely consumer target is less than 10% of the Myanmar population today. When considered in terms of the ASEAN market, this is the weakest target amongst the highly populated markets in the region, such as Indonesia, Vietnam and Malaysia.

This scenario is supports recent government surveys, which found that inherently low household incomes mean that an average of between 60% and 65% of household spending is on food and drinks, with around one third of such spending being on animal and vegetable proteins. Per capita consumption of rice is very high, when compared to more developed ASEAN nations, e.g. Malaysia, which is also indicative of a low income economy.

**The consumer market and demand characteristics are highly complex, and demand for imports has been growing rapidly**

The consumer markets and demand traits in Myanmar are highly complex due to a range of different factors. They include the most complex demand base for meat in Asia; a strong traditional food culture; well-educated consumers that have already developed some demands for convenience and quite high levels of health and nutrition concerns; very high levels of price sensitivity all along the supply chain, developed preferences for imported brands; concerns about the quality of local products; and local industries that have developed in absence of competition from foreign investment, except for a few entrants from other Asian countries, e.g. Thailand through “strategic joint ventures”.

Myanmar imported food, drink, agrifood commodities and feed material imports valued at US$ 1.6 billion in 2011, up from only US$ 415 million in 2005.
Trends in Myanmar’s of Food, Drinks, Agrifood Commodities and Feed Materials  
– 2005 to 2011

Note: 2011 data is provisional at the time of writing.  
Source: Official external trade data (FOB values)

Although still a very small import market in the context of the other ASEAN countries, this growth is significant because it has taken place at a rate of over 40% per annum since 2005, with double digit growth being seen in all categories, except one, which grew at a high average of 9% per annum over the period.

The fastest rates of growth since 2005 were seen in feed materials (117% per annum), sugar and its products (111%), processed fish and meat (100%), cereal-based processed foods (79%), instant beverage powders (70%), and drinks, both non-alcoholic and alcoholic (60%).

**Demand for processed food and drinks has been growing rapidly**

While Myanmar is strong in the supply of basic food products, the opposite is the case for processed food and drinks. Over 50% of import value in 2011 comprised processed food and drinks, a situation that has developed since 2005 because Myanmar’s local food and drink industry has not had the capabilities, or the capacity, to deal with the rapidly growing middle income and lower income fringe demand. Modern trade retailers and some wholesaler-distributors have therefore turned to China, Thailand, Singapore and some other Asian countries to fill the supply gap, which has been expanding in size since 2005.
This has led to the products of multinationals, such as Nestlé, PepsiCo and Coca-Cola, and some prominent Thai and Singaporean companies taking a high profile and share (although maybe not market leadership) in the markets where their products fit and have actively growing demand. Trade sources comment that Nestlé is already likely to be the largest player in the Myanmar processed food and drink market, based on exports of its products from its production bases in the other ASEAN countries.

**Myanmar will be the first Asian economy to develop in a free, or freer, trade environment**

The situation of imported food and drinks is likely to become even more dynamic in future. Currently, Myanmar’s food regulations and related enforcement processes are very unsophisticated, and so do not form much of barrier to the main products that are being imported. While Myanmar uses tariffs in an attempt to control imports, it also has substantial FTA commitments that are either in force today, or about to come into force between 2015 and 2020.

Myanmar is going to be the first and, possibly, the only Asian country that will develop its economy in a free / freer trade environment over the next 10 years. This is very unlike the protected scenario in which Thailand, Malaysia and Indonesia developed during the 1980s and 1990s.

Under the ASEAN Trade in Goods Agreement (ATIGA), close to 100% of all Myanmar’s tariff line items are now set at 0% import duty today, and, by 2018, all of the remaining tariff lines, with the possible exception of rice and sugar, will be set a 0%. This will make Myanmar effectively a free market for ASEAN-content products, including all processed food and drinks.

Additionally, under the ASEAN Community accords, the ASEAN Comprehensive Investment Agreement also opens up many sectors to ASEAN businesses (including foreign companies that are substantial in terms of operations and domiciled within ASEAN’s borders) that will otherwise likely be closed to investment by non-ASEAN businesses.

Added to the ATIGA scenario, Myanmar has received substantial FTA commitments from Australia, New Zealand, China and India, which, on the positive side, provide its export-oriented manufacturers with an open market and good opportunities for their products today. This will assist in developing Myanmar’s economy in future.
Within these FTA agreements, Myanmar’s own commitments to these countries will also see its markets opening to Australian, Chinese and Indian products under lower tariffs than its WTO MFN tariffs between 2015 and 2020. Australia, as an example, will see significant benefits in terms of lower tariffs on a range of its key export products by 2017, e.g. fresh/chilled and frozen meats.

**While the situation is positive, there are some darker “other side of the coin” aspects to the scenario that need to be considered in risk analysis and due diligence exercises covering Myanmar**

Overall, there are a lot of dynamic factors impacting on the opportunities in Myanmar for food and drink businesses, whether local or foreign, over the period to 2013. While this is the case, underpinning the market, industry and supply scenarios today are some very concerning issues related to the actual state of political control, transparency in general, and the genuineness of Myanmar’s opening up in 2012.

This reality of this situation has been stressed by Aung San Suu Kyi in her many speeches in 2012 regarding the state of transparency in Myanmar since 2011. The key concern for anyone trading in, or with, Myanmar lies in the fact that there is a deeply entrenched and hidden web of business and other forms of connections between the “former ruling elite” (i.e. the military and their cronies) and businesses both in, and outside, Myanmar that have built up, in some cases, since the 1960s. Two of the biggest questions that exist in Myanmar today are who controls what, and who are you really dealing with?

**What questions does this report answer?**

While there are significant and lingering doubts over whether real change has come to Myanmar, the events of 2011 and 2012 have very clearly put the country “on the map” as a new market and investment destination for businesses to think about. The other big questions to ask today are what is the real situation in the food market, industry and supply chain today, and, very importantly, what are the strategic directions and scenarios for the future?

The goals of this study are to provide realistic and commercially oriented answers to the following top line questions that have been posed to us by clients about Myanmar and its future:

- **What strategic impact does Myanmar’s current policy foundation have on business opportunities in the food market, industry and supply chain today?**
• What was the state of economic development as a driver of a strengthening consumer market and demand base in Myanmar over the past 5 years?

• What is the real state of the consumer markets and demand for processed food and drinks in Myanmar today?

• How is Myanmar’s policy and regulatory system structured for food, drinks and agrifood commodities in terms of its impact on locally produced products and imports?

• What strategic impact does Myanmar’s development policies and food market and industry regulatory system have on food industry business opportunities today?

• As Myanmar is a member of ASEAN, to what extent is it interacting with the ASEAN Free Trade Area and ASEAN’s other FTA with its neighbours in the Asia Pacific region?

• To what extent does Myanmar’s FTA commitments favour, or disadvantage, exporters from different countries and when does its commitments on free trade in food, drink and agrifood commodities become a reality?

• What is the state of Myanmar’s agricultural industries today and access to imported food ingredients and their strategic impact on processed food business opportunities today?

• How have the markets for imported food, drinks and agrifood commodities developed over the past 5 years and what has driven or restricted the growth in imports over that period?

• What is the state of Myanmar’s food and drink processing industry and its strategic impact on competition in today’s market?

• What is the state of Myanmar’s food supply chain and distribution channels and their strategic impact on food industry business opportunities today?

• What drivers today exist that will impact of the future strategic shape and direction of Myanmar’s food and drink industry, market and supply chain?

• What barriers exist today to future change in Myanmar’s food and drink industry, market and supply chain?

• What will be the main drivers and barriers on Myanmar’s food and drink industry, market and supply chain over the period to 2018?

• What are the likely future scenarios that will develop for Myanmar’s food and drink industry, market and supply chain over the period to 2018?
"Myanmar Food and Beverages 2018: Strategic Directions and Scenarios for Myanmar's Markets and Industry"

- How will Myanmar’s markets for food, drinks and agrifood commodities develop in terms of growth, or otherwise, over the period to 2018?

- What opportunities and threats will exist for existing players in Myanmar’s food and drink processing industry and new entrants over the period to 2018?

- What are the opportunities and threats will exist for exporters that target Myanmar’s markets for imported finished food and drinks and food ingredients and inputs over the period to 2018?

The purpose of this study

This study has been specifically undertaken to assist clients with their strategic planning, business development and marketing activities in Myanmar over the period to 2018.

It is essentially a scenario planning exercise that analyses and assesses the key factors that will affect the food and drink industry, their markets and supply chain in Myanmar over the next 5 years, inclusive of the indicators of business opportunities and risks for existing businesses, and new entrants to the industry, over this period.

It is formatted in a manner that will facilitate its use in strategic planning by existing players in Myanmar and new entrants, whether they are new investors in Myanmar, or new trading entrants to the Myanmar market, e.g. exporters.

Why you should buy this report

Unlike other reports, our study is not just a catalogue of statistics and facts. As with all of our past Asia Pacific Food Insight Series reports, we analyse the statistics, facts and underlying market and industry drivers to provide you with real insights into Myanmar’s food, drink and agri-food market opportunities, both today and tomorrow.

Practical scenarios for the future of Myanmar’s food and drink industry, market and supply chain are developed and explained to you in this report. A copy of the report’s table of contents is appended to this brochure, which provides an overview of the study’s coverage and our analysis of its findings.

What markets are covered by this study?

This study covers the following categories, whether locally produced in, or imported to, Myanmar:
• Consumer ready foods:
  - Beer;
  - Butter;
  - Cheese;
  - Chocolate-malt beverage powders;
  - Coffee;
  - Coffee creamers, non-dairy
  - Cookies and crackers;
  - Extruded snacks;
  - Fresh fruits and vegetables;
  - Fruit juices;
  - Ice cream;
  - Infant foods;
  - Instant beverage mixes;
  - Liquid milk;
  - Noodles and pasta;
  - Sauces and seasonings;
  - Soft drinks;
  - Soups;
  - Spirits;
  - Sugar confectionery;
  - Tea;
  - Wine; and,
  - Yoghurt; and,

• Commodities, ingredients and inputs:
  - Buttermilk;
  - Dairy fats and oils;
  - Edible oils;
  - Feed materials;
  - Fish and seafood;
  - Meat and poultry;
  - Milk powders;
  - Soybeans;
  - Wheat; and,
  - Whey.
Who can use this report?

This study was undertaken for board / top level and other senior management of businesses and other organisations and government officials that wish to obtain an up-to-date and detailed understanding of the future scenarios for Myanmar’s food and drink market, industry and supply chain in the period to 2018.

It will also be useful to food, drink and food ingredient company strategists and analysts who require an better strategic insight into likely opportunities and threats for their business in future.

This study was researched by senior consultants who have many years specialising in advising the senior management of food and drink companies about business strategy and market development in Asia, including Myanmar. The project management team included Managing Consultants who have been managing food and drink strategy projects and other projects on a regular basis in Myanmar since 1989.

Who we are and what we have done

Stanton Emms Strategy Consultants (formerly Stanton Emms & Sia) is an international strategy consultancy that specialises in assisting the senior management of food, drink and agrifood businesses to identify opportunities, develop their businesses, and develop markets for their products.

We were formed in 1991, are headquartered in Singapore and have offices and associates located all across the East Asian region, including Myanmar. We have been working with a wide range of clients, including Asian companies, some multinationals and other foreign companies, and international marketing organisations, in Myanmar since 1995.

We also specialise in policy analysis on matters such as development and trade for foreign governments with an interest in obtaining better understanding of policies and regulatory environments that exist in East Asia, including Myanmar.

One of our key roles for clients in the ASEAN, including Myanmar, since we started operations in 1991 has been to assist their senior management with their risk analysis and “marketing due diligence”. Due to the complexity of Myanmar, we have also providing them with second opinions on issues that are impacting on, or will impact on, their business in, or with, the country in future.

Our past projects in Myanmar have covered the following:
• investment opportunities in the brewing industry and future opportunities in the beer market, including a pre-investment study to support a senior management team’s risk analysis on Myanmar as a venue for a major new investment;

• the production and availability of starch crops and their products, utilisation locally and in the export market, and future trends in supply availability;

• the structure and control of the tobacco industry and market;

• identification of future opportunities in the markets for:
  o edible oils, refined;
  o chilled processed meats;
  o alcoholic drinks, including whisky, rum, gin, vodka and liqueurs;
  o imported beer;
  o soft drinks;
  o instant powdered beverages, namely coffee, tea and chocolate-malt varieties;
  o cookies and crackers;
  o wheat flour;
  o infant formula and foods;
  o extruded snacks; and,
  o instant noodles;

• the meat and poultry industry and its demand for feed ingredients and inputs;

• bulk dairy ingredients, namely milk powders, milk formulas, whey, lactose and casein;

• agricultural development policy and strategy related to the livestock supply chain, i.e. feed through to the end markets for livestock products;

• an investigation into a failed investment into the retail sector, as part of a retailer’s strategic review for a new investment;

• trade policy and regulations towards imported food, drinks and agricultural commodities; and,

• the extent of Myanmar’s participation in the ASEAN free trade area and the ASEAN + FTAs, e.g. with Australia and New Zealand, China and India.

In addition to this, Myanmar has also featured in some of our ASEAN region focused consulting and research projects for clients.
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