Agriculture and Rural Development Sector Coordination Group

September 2020: Surveys on the impact of COVID-19

Common Findings:

- Crop prices and sales are declining
  - 63% of communities report less income from crop farming
  - horticulture producers are affected most
  - decrease in border trade (~0% to India and China) is expected to further reduce market prices
  - increased transportation costs are passed on to farmers in lower prices
  - fewer traders buying product do to mobility restrictions
- Lower yields of monsoon crops expected
  - input costs increased, with sales decreasing from May to July
  - 40% of communities reported low rain in July and August
- Community food and nutrition security improving
  - communities that reported receiving government non-food assistance increased dramatically from July to August (7% to 68%)
  - perceived extreme poverty in communities decreased from 17 to 11%
  - communities in Rakhine State report an increase in dry good prices, less access to vegetables, and limited market hours
- Supply side shortage
  - 46% of millers report lower milling volumes (30% reduction), and difficulty buying paddy
  - millers are offering lower than average prices for paddy and selling milled rice at higher than average prices
- Commodity trading stabling
  - fewer disruptions in August than previous months, however 33% report difficulty marketing and 24% with buying
  - traders report lower margins, but prices have been stable

Common Recommendations:

Note: Significant movement restrictions have been put in place since these surveys were conducted

- Union level and local level movement restrictions should take into account, and allow for, necessary value chain functions, such as the supply of inputs and the delivery of products to traders and markets
- Scale up safety net programs (cash transfers) to vulnerable households and farming households that are expected to have lower income from crop sales this season
- Continue to support the enabling environment around mobile payments for value chain actors
- Continue to provide loans to agriculture firms and/or extend terms of current loans (38% of millers reported applying for a loan, World Bank survey of found 48% of agriculture firms have outstanding loans-May)
- Prioritize the uninterrupted flow of border trade, which will help stabilize market prices.

Myanmar COVID-19 Phone Survey results

proximity

Proximity Designs Covid-19 Tracker Farmer Surveys

Overview

- Bi-weekly tracker surveys through online, phone and field staff surveys
- Proximity Designs started this tracker surveys since April 2020 to monitor the impact of Covid-19 on smallholder farmers
- Regular report updates shared with internal and external stakeholders

Survey design

Objectives:

- Assess the impact of Covid-19 on rural Myanmar farmers

Survey design:

- Bi-weekly online surveys recruited through Facebook, complemented with phone interviews and field staff reports

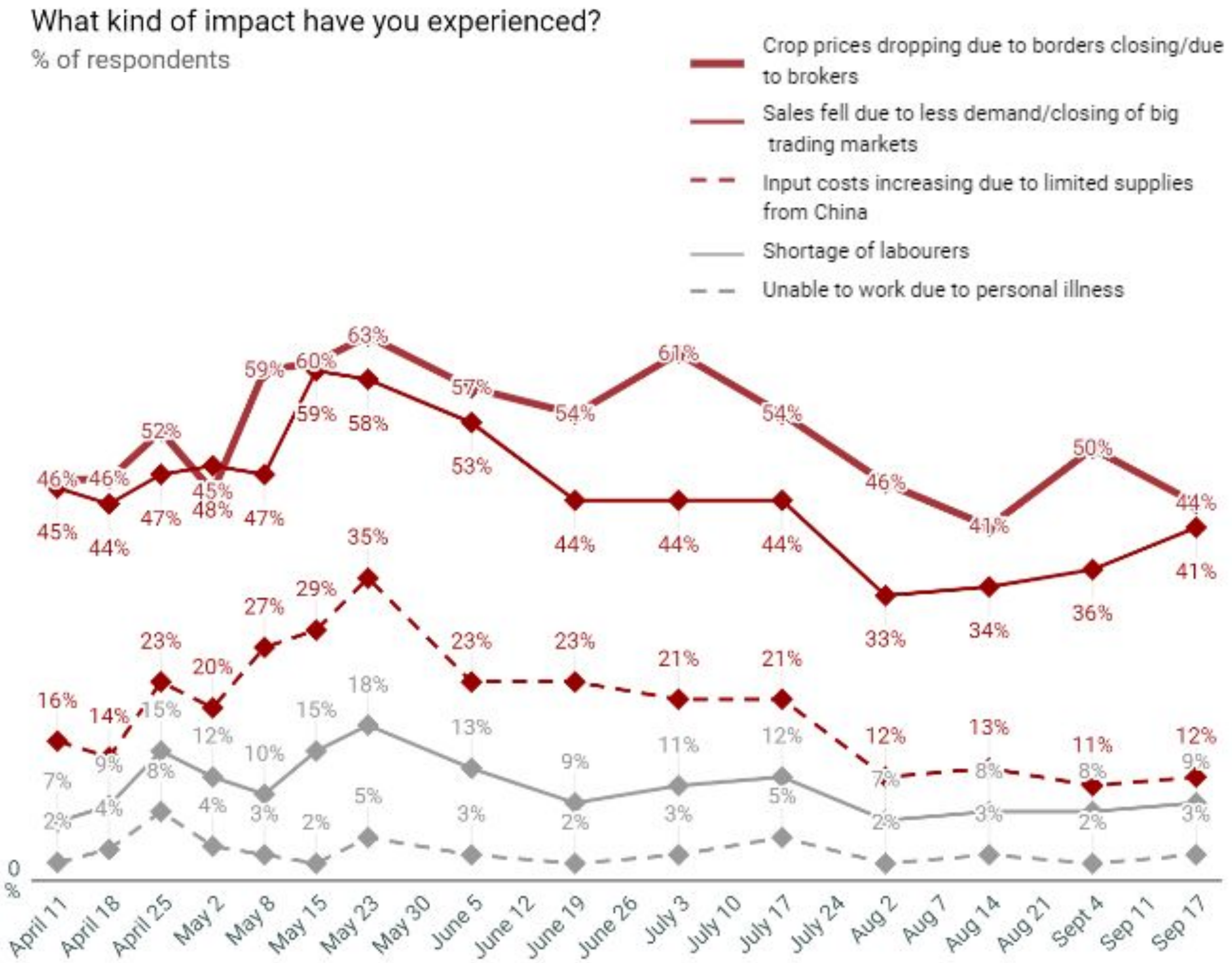
Questionnaire content

- Covid-19 awareness and behavior
- Impact of Covid-19 on farming activities
- Farming outlooks and behavior

	Total	Round 15	Round 16
States & Regions	All regions	All regions	All regions
# of respondents	7,450	364	433
Survey timeframe	Since April 2020	Sep 4-8	Sep 17-21
Pre-C19 study	None	None	None

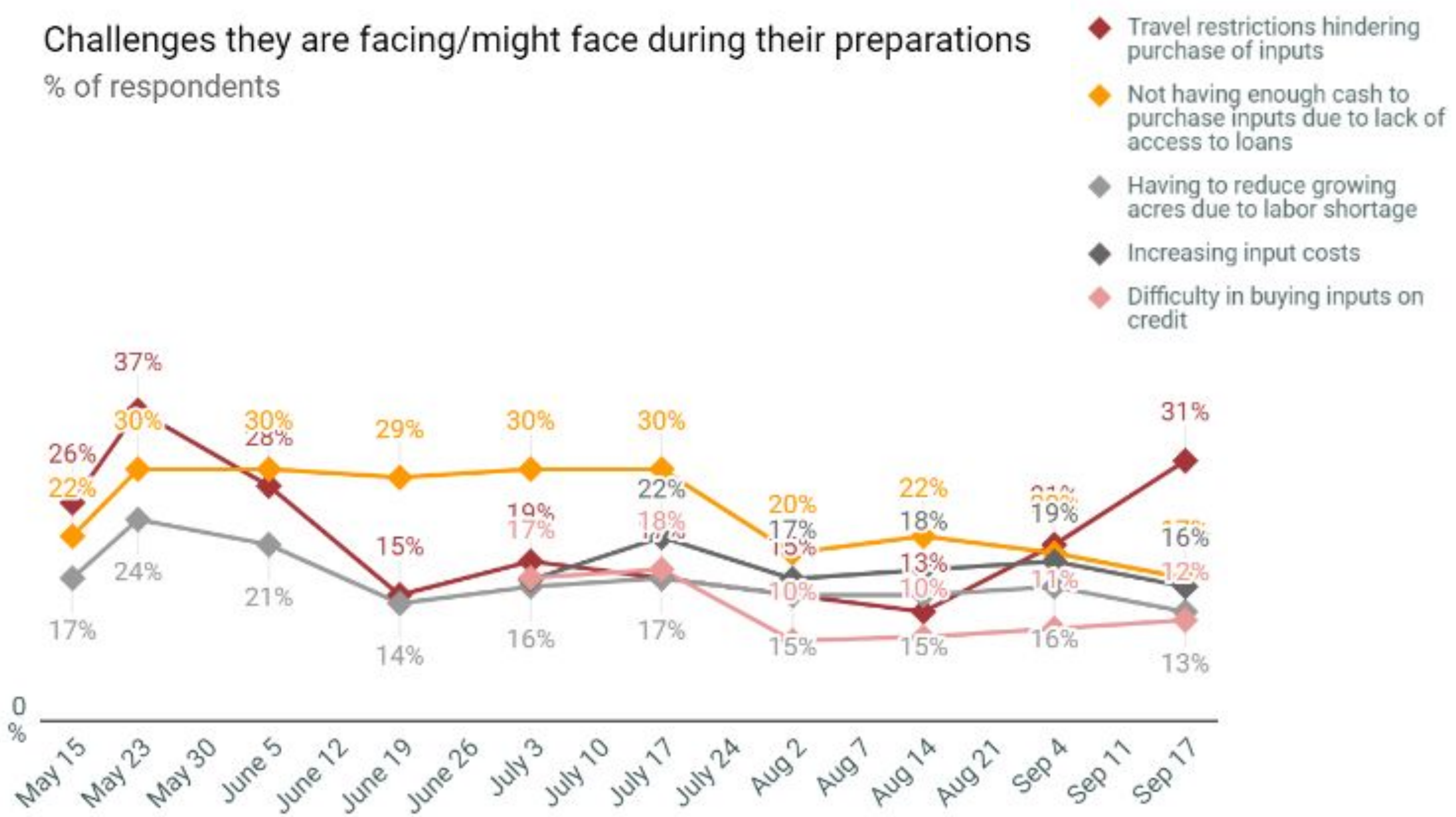
Key results – 1 : Starting to see the impact on crop sales again in the month of September

- 41% reporting declining sales in the September 3rd week (compared to 36% in the September 1st week).
- Most affected at the moment are flower and some horticulture growers due to the perishable nature of their crops.



Key results - 2 : More farmers have reported difficulties in purchasing inputs.

- 31% reported as such in the latest round (September 3rd week), compared to 21% in September 1st week.
- The time of the survey was before the recent stay-at-home orders.
- With the new stay-at-home restrictions, farmers could face even more challenges in purchasing inputs due to shop and market closures.



Recommendations summary

- With the closures of agricultural businesses as per the recent Covid-19 policies, we might see more impact on the availability of inputs in the coming month.
- Same as the first wave, varying township-level and village-level restrictions could impact crop sales and prices.
- Policy makers should consider the impact on the availability of agricultural inputs and flow of goods in agricultural market systems, when drafting Covid-19 policies.

Survey Outputs

- Detailed survey results available upon request. Please contact thethninaye@proximitydesigns.org

proximity

COVID-19 Community Survey (MAPSA)

COVID-19 Community Survey (MAPSA)

Overview

- Starting late June 2020 with respondents from 308 different communities (round 1), increasing to 370 communities (round 2) across the country (partial panel)

The rationale of survey:

- To analyze COVID-19 prevention measures, poverty and food insecurity
- To explore access to social safety nets or other forms of assistance, Migration – inward and outward;
- To analyze disease prevalence and disruption to health services, and exposure to different kinds of shocks;
- To investigate problems with agri-productions and marketing, and priorities for public investments or programs in the local community

Policy note:

- Round 1 and round 2 : Community perceptions of the social and economic impacts of COVID-19 in Myanmar

Survey design

Objective:

- To better understand both the economic and social impacts of the COVID-19 crisis on Myanmar's diverse rural and urban communities.

Survey design:

- Two community survey cross sections (only a partial panel due to attrition), but large samples in each round (>300)

Questionnaire content

- COVID-19 prevention measures, social safety nets or other forms of assistance, migration, disease prevalence and disruption to health services, shocks, problems with agricultural production & marketing, priorities for public investment

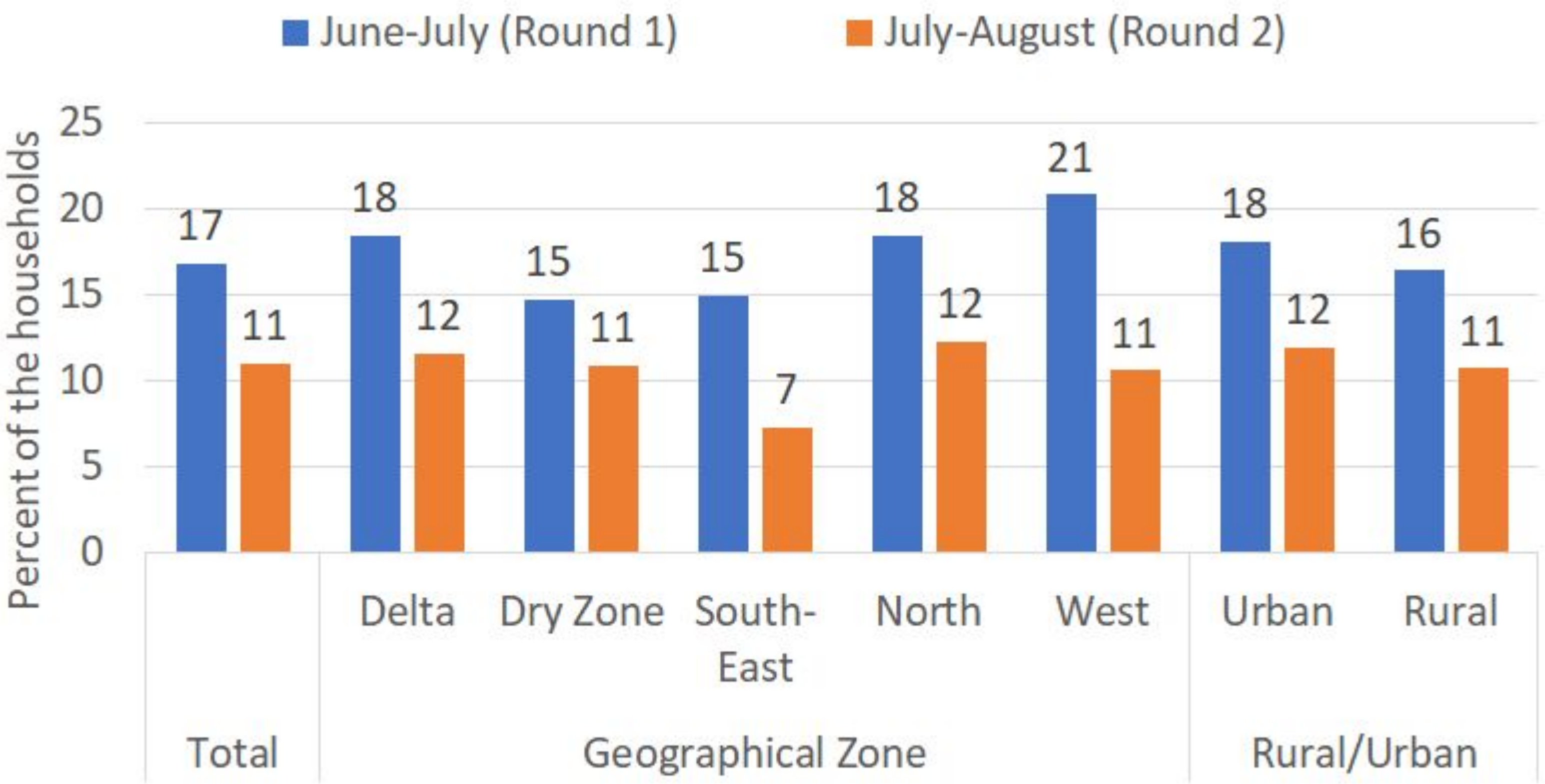
Sample area		Round 1 (communities)	Round 2 (communities)
Geographical Zone	Delta	93	100
	Dry Zone	118	125
	South-East	32	49
	North	54	78
	West	11	18
Rural/ Urban	Urban	85	92
	Rural	223	278
Total		308	370

Key results – 1: Community perceptions of extreme poverty

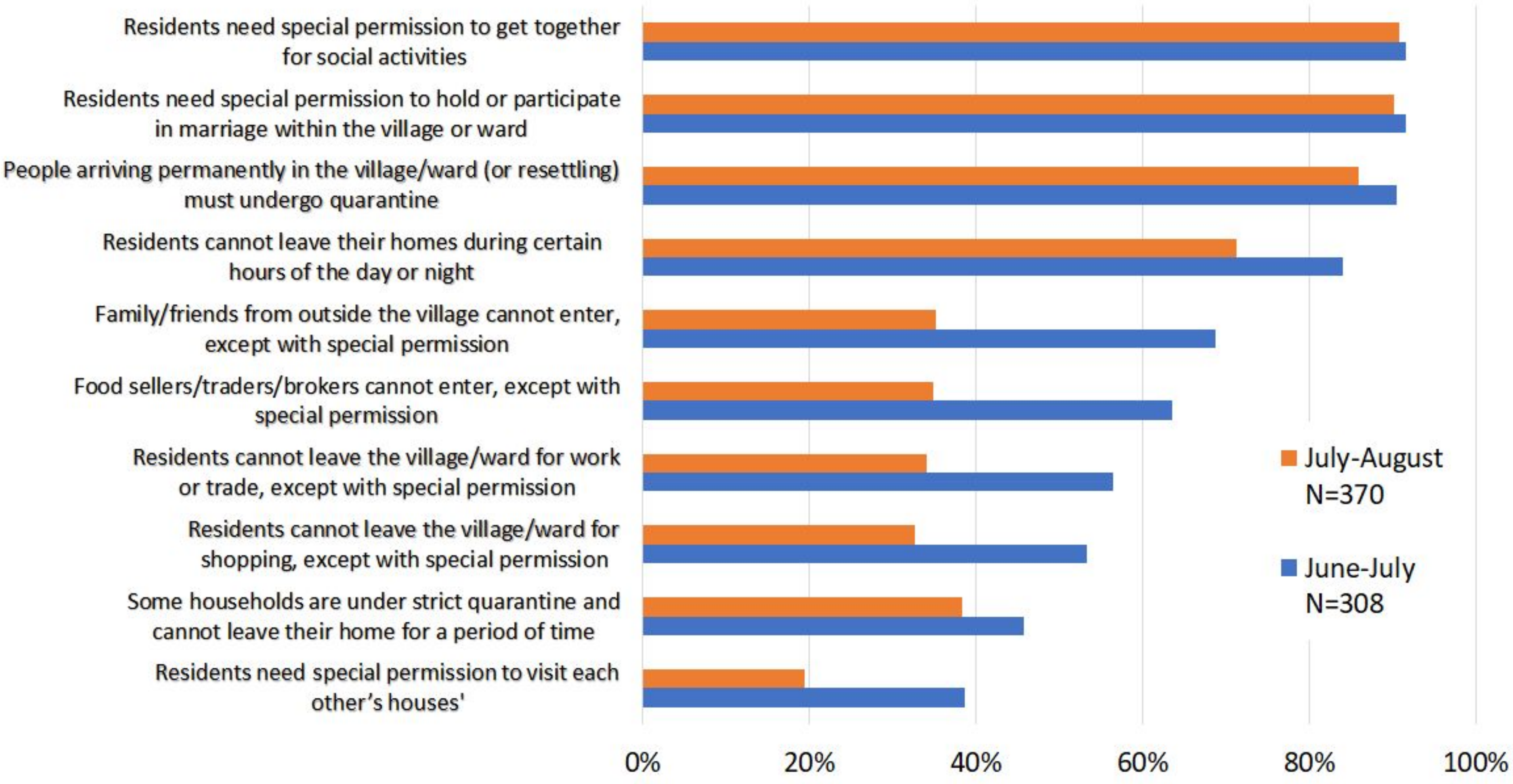
- **Changed Gov Social protection modalities with large increase in reported non-food assistance programs:**
  - 7% in June/July up to 68% in July/August

- **Reduction of perceived extreme poverty**:
  - Fell from 17% in June/July to 11% in July/August

Poverty trend by survey round



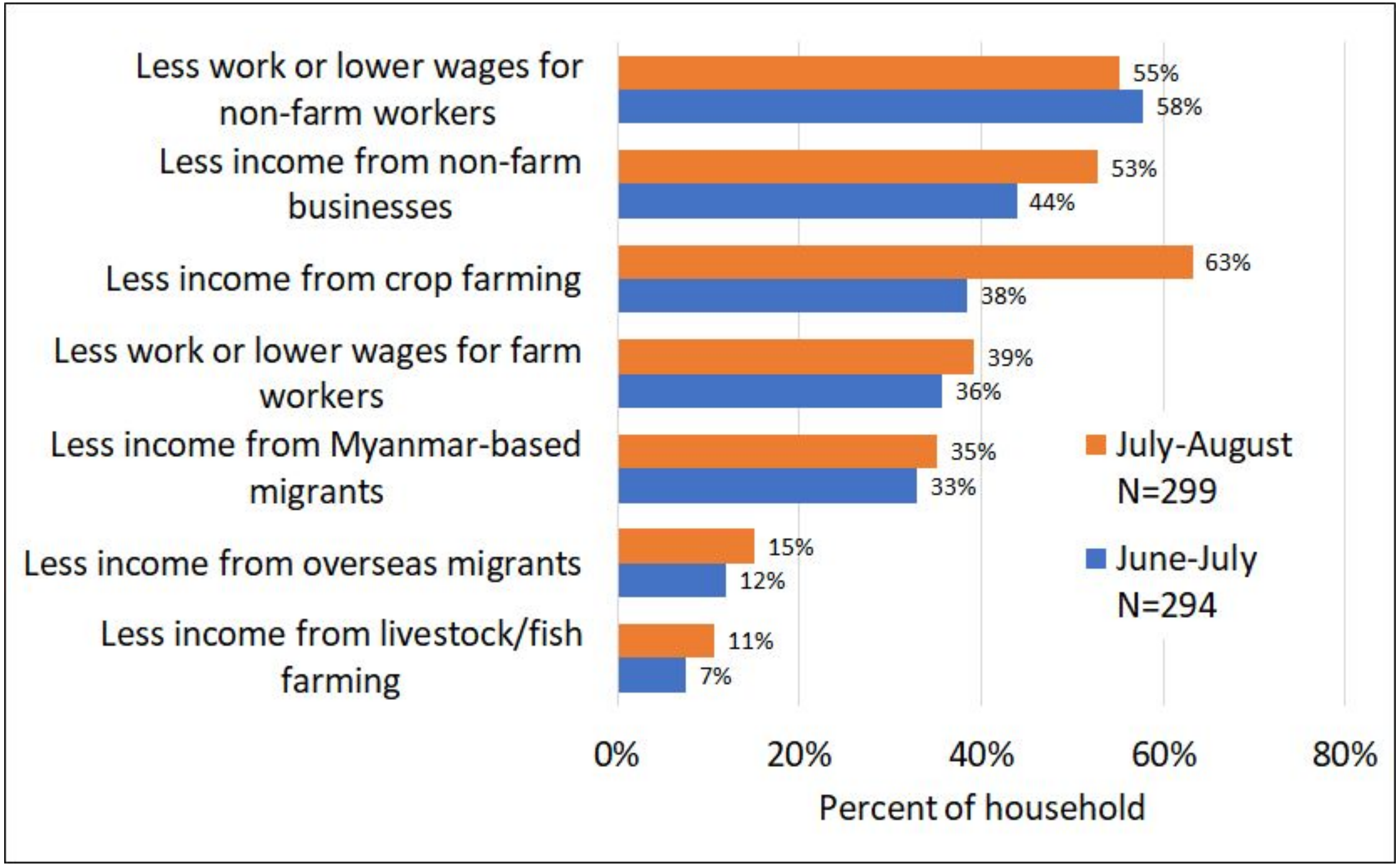
Key result 2 : C19 prevention measures relaxed, especially mobility restrictions



Key result 4: Fewer communities reporting lowered incomes from farming in July-August

- Communities still say incomes are lower than normal for various reasons, especially less work, less non-farm income, lower wages and lower remittances
- However, "less income from crop farming" was cited <u>more</u> frequently in July-August: 63%

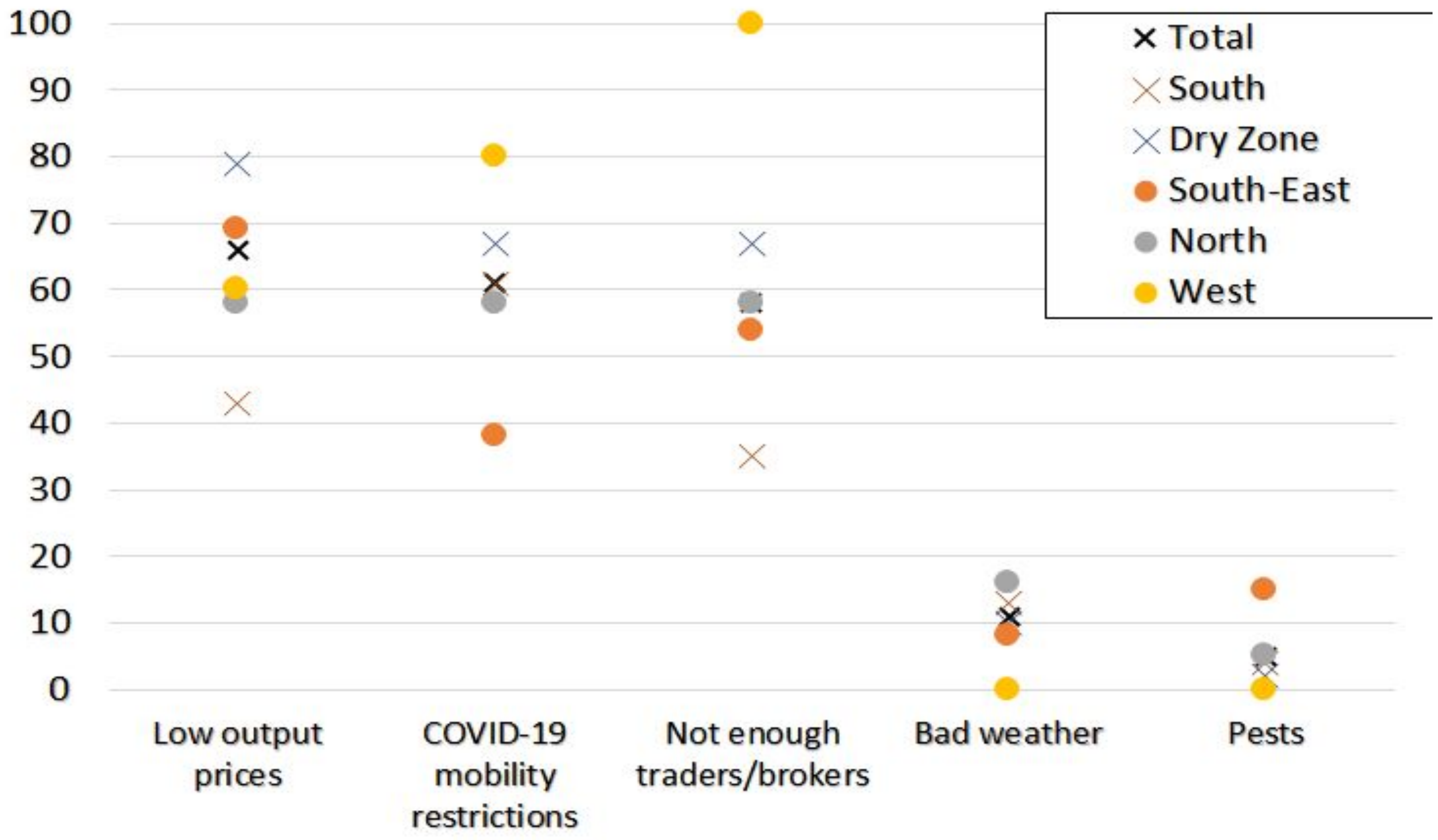
Income loss types



Key result 4 : Rural communities still cite problems with weather, output prices, mobility restrictions

- **Affected by weather shocks:**
  - 40% the communities (July/August) cited bad weather, mostly too little rain
- **Main problems with sale of agricultural products were**
  - Low output prices (66%)
  - C19 mobility restrictions (60%)
  - Not enough traders/brokers
- **Three local priorities for action are consistently stated:**
  - 67% improved infrastructure
  - 44% mention need for income-generating activities
  - 43% mention income and food support

Challenges to sales of agricultural products in July-August 2020



Recommendations summary

- Continue raising awareness on the COVID-19 prevention measures in place and the importance of complying with these rules in the context of recently increasing COVID-19 cases.
- Community estimates of extreme poverty fell in July/August but are likely rising again because of renewed COVID-19 cases and the re-imposition of prevention measures that earlier were eased.
- Scaling up social protection measures will be important for supporting the most vulnerable populations.
- The Ministry of Agriculture, Livestock, and Irrigation (MOALI) and its development partners should closely monitor weather patterns and pest outbreaks in 2020 and continue supporting farmers.
- Agricultural production and marketing must be sustained or even enhanced to reduce the risk of higher rates of poverty and food insecurity.
- Important to keep agricultural markets functioning well; most trading and transport activities are likely a low risk for COVID-19 provided that basic protective measures are taken

Survey Outputs

- More detailed results are available at this
- Policy note 1 : link
- Policy note 2 : link

SNAPSHOT OF MARKET ACTORS' PERSPECTIVES: COVID-19 IMPACTS IN RAKHINE STATE

(AUG. 30-SEPT 18, 2020)

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Mercy Corps' Market Analysis Unit (MAU)

The Market Analysis Unit provides development practitioners and policymakers operating in Rakhine State with data and analysis to better understand the present and potential impacts of COVID-19, conflict and other crises on:

- **Household purchasing power, coping mechanisms** and **access to basic needs**;
- **Market functionality**, particularly as it relates to **food systems**;
- **Trade** (ag. inputs and supply, machinery, commodities) and **cross-border dynamics**;
- **Financial services**, including **financial services providers,** household and business **access to finance** and **remittances**; and
- **Labor markets** (formal and informal), with a focus on agricultural labor and low wage sectors (construction, factories, food services).

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SNAPSHOT OF MARKET ACTORS' PERSPECTIVES: COVID-19 IMPACTS IN RAKHINE STATE (AUG. 30-SEPT 18, 2020)

Overview

- *During September 11-18 Mercy Corps' Rakhine Market Analysis Unit (MAU) conducted phone interviews with **31** input sellers and agricultural commodity traders in **eight townships** (Kyauk Taw, Maungdaw, Minbya, Mrauk U, Pauktaw, Ponnagyun, Rethedaung and Sittwe Townships).*
- *Mercy Corps asked respondents to reflect on changes in local business conditions since August 30.*

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Restrictions Related to COVID-19

- Pandemic-related restrictions across Central and Northern Rakhine State remain largely unchanged since going into effect in mid-August, however market actors report reduced enforcement and increasing outdoor activity in most townships.
- Curfews continue to be enforced, but enforcement of mask requirements and limits on how many household members may leave home have eased considerably.
- Quarantine for travel between townships remains in place too, although enforcement is irregular.
- Market actors report that Covid-19 restrictions have not significantly limited travel between towns and villages.

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Essential Goods

- Reductions in panic-buying has allowed the market for essential goods to stabilize considerably since Aug. 30, yet transportation limits continue to threaten fundamental market stability.
- Market actors report that prices have flattened but remain high for dry / bulk goods (e.g. beans, lentils, packaged dry noodles) and kitchen products (e.g. oil, salt, spice), largely due to the transportation costs of importing these goods from central Myanmar.
- Actors in Sittwe and Ponnagyun also cite limited availability of vegetables, likely due to difficulty importing these goods from more prolific regions of Rakhine State such as Kyauk Taw and Mrauk U Townships (where vendors voiced less concern about vegetable supply).

Business Activity (1 of 2)

- Despite increased foot traffic in towns, business conditions have not improved but worsened.
- Limits on major market hours remain in place, with most closing by 1pm.
- In some townships (e.g. Minbya) there has been some reopening of businesses beyond those strictly related to food and medicine.
- Access to business-related goods and services (e.g.inputs, credit) remains poor, and in some cases it has worsened.
- Transportation limits are largely at the root of this, as rising transport costs are passed along to imported goods.

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Business Activity (2 of 2)

- 97% of respondents say **current business conditions** are somewhat or very difficult;
- 71% say **business conditions are more difficult** since Aug. 30;
- 61% say **acquiring inventory has gotten harder** (90% now find it difficult);
- 71% say **transportation has become less available** since Aug. 30;
- 40-50% say **vegetable seed, fertilizer and pesticide** are less available;
- 58% report **rising prices for transportation**, and 33% report rising prices for fertilizer;
- Labor markets vary by township, but **access to credit has not changed** significantly.

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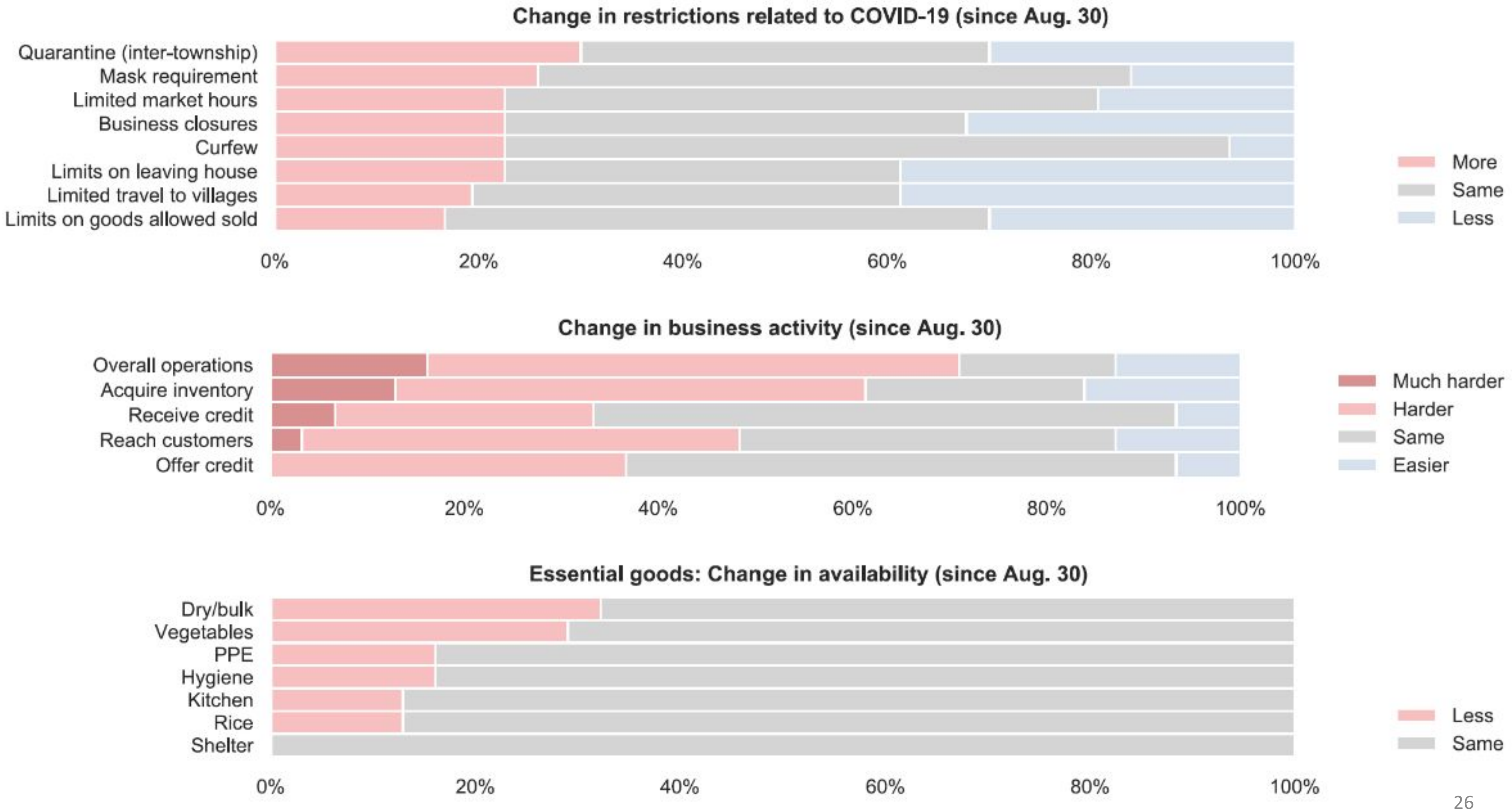
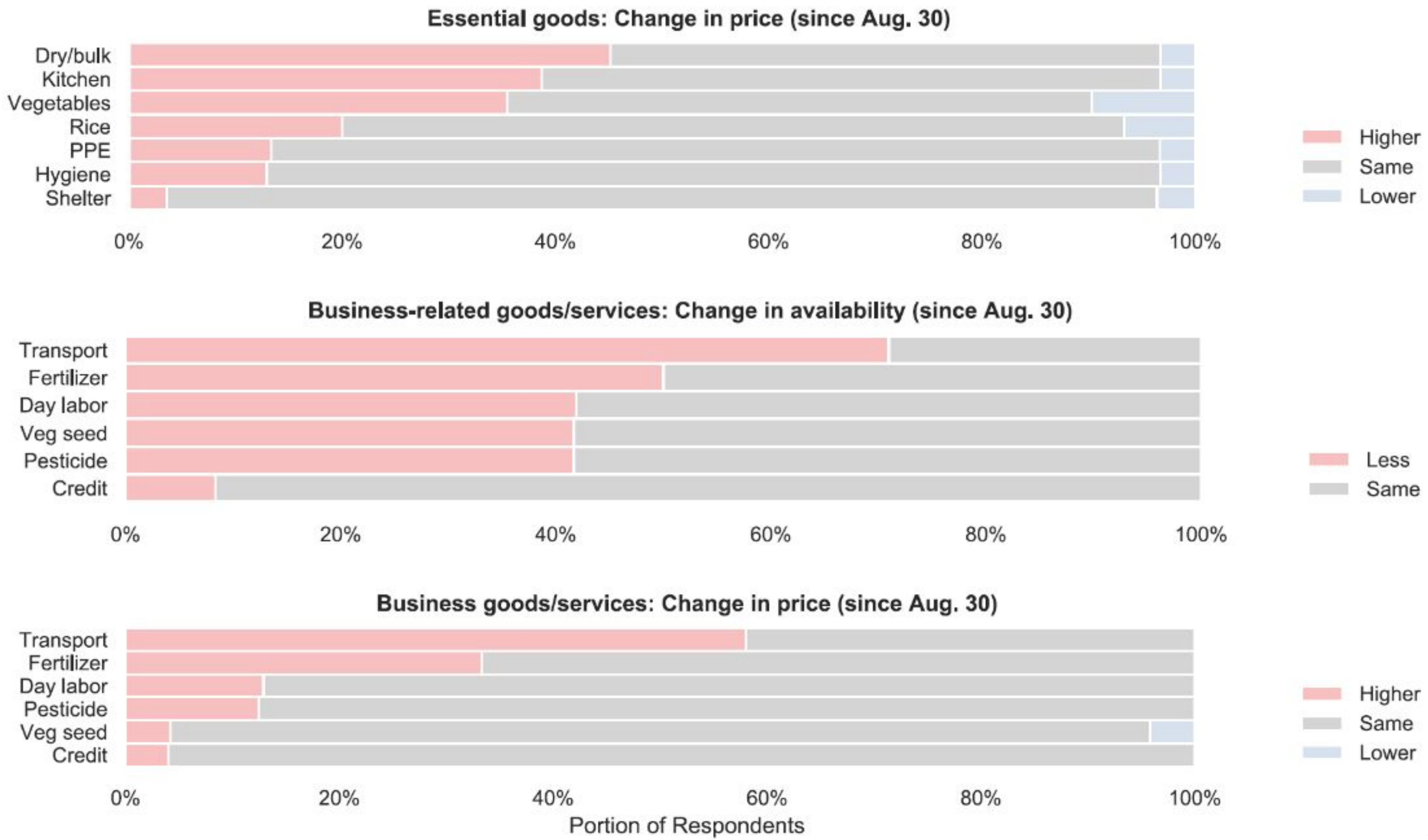


Change in restrictions related to COVID-19 (since Aug. 30)
Quarantine (inter-township)
Mask requirement
Limited market hours
Business closures
Curfew
Limits on leaving house
Limited travel to villages
Limits on goods allowed sold
0%
20%
40%
60%
80%
100%
More
Same
Less
Change in business activity (since Aug. 30)
Overall operations
Acquire inventory
Receive credit
Reach customers
Offer credit
0%
20%
40%
60%
80%
100%
Much harder
Harder
Same
Easier
Essential goods: Change in availability (since Aug. 30)
Dry/bulk
Vegetables
PPE
Hygiene
Kitchen
Rice
Shelter
0%
20%
40%
60%
80%
100%
Less
Same


Essential goods: Change in price (since Aug. 30)
Dry/bulk
Kitchen
Vegetables
Rice
PPE
Hygiene
Shelter
0%
20%
40%
60%
80%
100%
Higher
Same
Lower
Business-related goods/services: Change in availability (since Aug. 30)
Transport
Fertilizer
Day labor
Veg seed
Pesticide
Credit
0%
20%
40%
60%
80%
100%
Less
Same
Business goods/services: Change in price (since Aug. 30)
Transport
Fertilizer
Day labor
Pesticide
Veg seed
Credit
0%
20%
40%
60%
80%
100%
Portion of Respondents
Higher
Same
Lower

Snapshot of Market Actors’ Perspectives:
COVID-19 Impacts in Rakhine State (Aug. 30-Sept 18, 2020)

- Full report available at this link

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Myanmar COVID-19 Phone Surveys:
Agricultural Input Retailers

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IFPRI MYANMAR

Livelihoods and Food Security Fund

MICHIGAN STATE UNIVERSITY

Agri-input retailers

	Dates	#
Round 1	May 21-23	221
Round 2	June 5-7	182
Round 3	June 17-20	172
Round 4	July 6-8	149
Round 5	July 23-25	145
States and regions: Shan, Ayeyarwady, Bago, Kachin, Mandalay, Sagaing		

<u>Survey objectives</u>

- Identify and monitor COVID-19 effects

<u>Survey outputs</u>

- Round 1 policy note
- Round 2 policy note
- Rounds 3&4 policy note
- Rounds 1-5 synopsis policy note

Survey design

Objectives:

- Identify and monitor COVID-19 effects
  - Transportation
  - Credit – lending and borrowing
- Learn about business responses
- Monitor input sales
  - Leading indicator of monsoon production
  - Year-over-year comparisons

Survey design:

- 220 respondents from previous in-person 2017-2018 survey in Shan, Mandalay, Magway, Sagaing

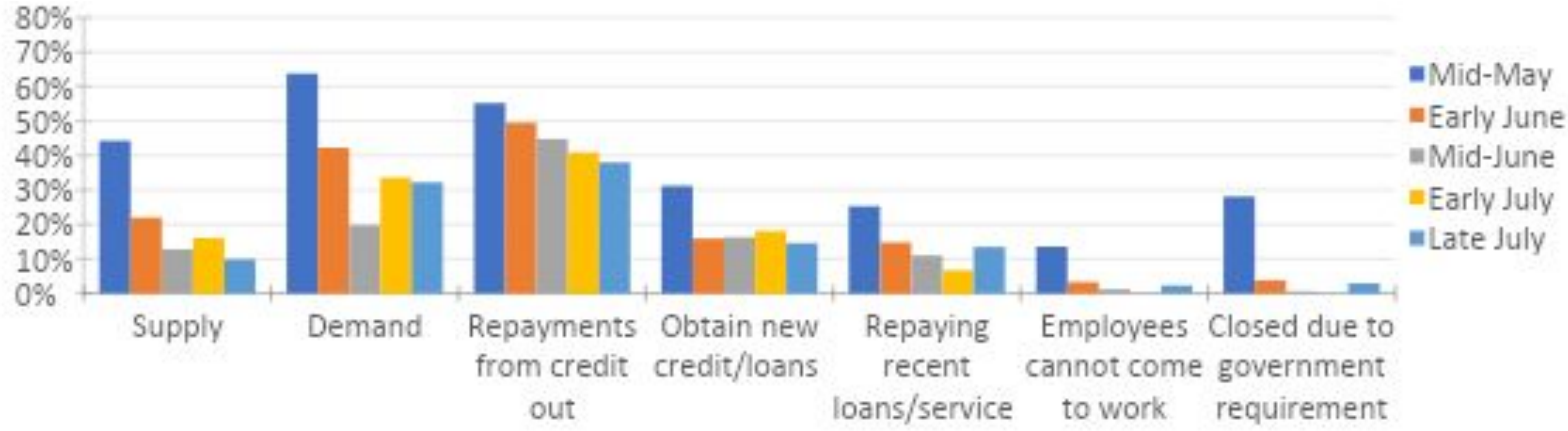
Questionnaire content

- Impacts on profits, affordability, demand
- Major constraints on doing business

	Agri-input retailers
States & Regions	Shan, Mandalay, Magway, Kachin, Sagaing
# of respondents	220
Survey timeframe	May-July, every 2 weeks
Pre-C19 study	2017/18

Key results – 1: COVID-19 disruptions by survey round

Figure 1. Main disruptions from COVID-19 crisis – by survey



1. Disruptions were most severe early in the crisis, stemming from travel restrictions
2. The most severe disruptions to input retail shops were sharply lower demand and collecting repayment from credit lent out, still impacted 32 and 38 percent of retailers, respectively, in late July

Key results - 2 : Lower fertilizer sales in 2020

- In each survey round, at least half of the input retailers surveyed reported lower sales in 2020 compared to 2019

- Likely to be yield effects resulting in smaller monsoon harvests this year

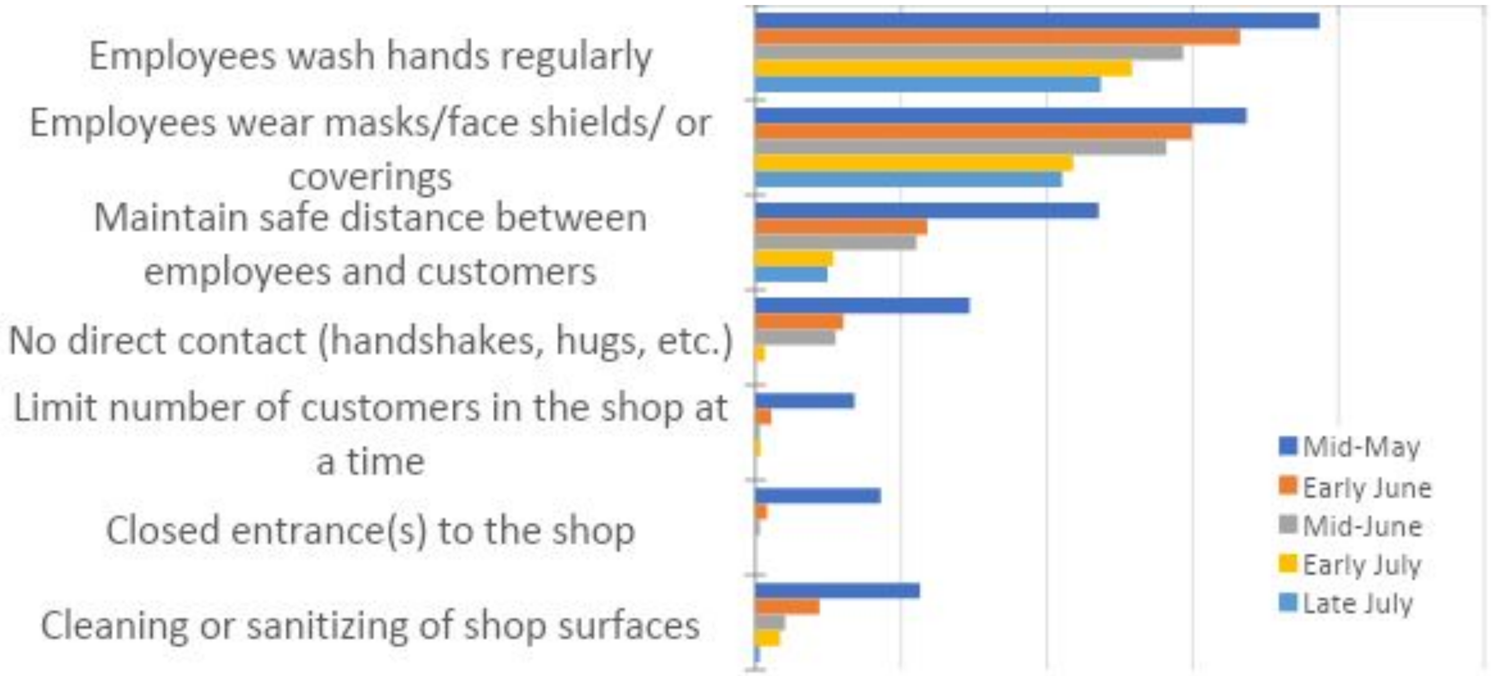
Table 1. Fertilizer sales by round

	Shops selling, percent	Average sale value among those selling, '00,000 MMK	Shops reporting changes in sales in 2020 compared to same time in 2019, percent	
			Lower sales in 2020	Higher sales in 2020
Mid-May	72	58	69	3
Early June	82	70	57	6
Mid-June	85	61	50	5
Early July	92	83	52	11
Late July	94	81	58	8

Key results - 3 : Safety measures waned over time

- Initial safety measure adoption was high, but incomplete
- Less than 50% of input retailers were regularly washing hands or wearing face coverings by late July
- Very low adoption of other safety measures by late July

Figure 2. Input retailer safety responses, by survey round



Recommendations summary

- Promote the sustained adoption of safety practices by businesses. Facebook, particularly the page of the Ministry of Health and Sports, was the primary source of information on COVID-19 safety for input retailers early in the pandemic.
- Plan future lockdowns to minimize disruptions to the agricultural input retail sector, particularly by allowing input retail businesses to remain open.
- Government should anticipate that many farm households will realize lower crop incomes than normal at the time of monsoon harvest – stemming from a decrease in input sales – and provide cash or lending support to smallholder farmers (CERP Action 2.1.7).
- Support input retailers financially by removing or deferring collection of business taxes and fees (CERP 2.1.3) and by the expanding working capital loan support program (CERP 2.1.1) to include agricultural input retailers.
- Promote the use of mobile banking services by both input retailers and farmers to modernize the sector and to facilitate easier delivery of future support programs.

Survey Outputs

- Late July (Rounds 1-5) Policy Note (link)
- June/July (Rounds 3 & 4) Policy Note (link)
- Early June (Round 2) Policy Note (link)
- May (Round 1) Policy Note (link)

- More notes and results are available at this link

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LIFT Livelihoods and Food Security Fund

MICHIGAN STATE UNIVERSITY®

Myanmar COVID-19 Phone Surveys:
Rice Millers

Rice Millers

Photo Credit: jtoddpope /Shutterstock

	Dates	#
Round 1	July	403
Round 2	August	371
Round 3	September	440
Rounds 4-5	*Oct - Nov*	
States and regions: Ayeyarwady, Bago, Yangon		

<u>Survey objectives</u>

- Identify and monitor COVID-19 effects on rice milling

<u>Survey output</u>

- Round 1 policy note
- Round 2 policy note
- Round 3 policy note (forthcoming)

Survey design

Objectives:

- Identify and monitor COVID-19 effects
- Learn about business responses
- Track rice prices
    - Buying & selling – monthly changes
    - Comparisons to 2019

Survey design:

- 400 respondents from previous in-person 2019 survey in Ayeyarwady, Bago, Yangon

Questionnaire content

- Impacts on profits, affordability, demand
- Major constraints on doing business

	Rice millers
States & Regions	Ayeyarwady, Bago, Yangon
# of respondents	400 millers
Survey timeframe	July – November, monthly
Pre-C19 study	2019

Key results – 1: Miller margins increased in August relative to July

- Paddy buying prices decreased and rice selling prices increased on average
- Resulting in larger margins for mills on average

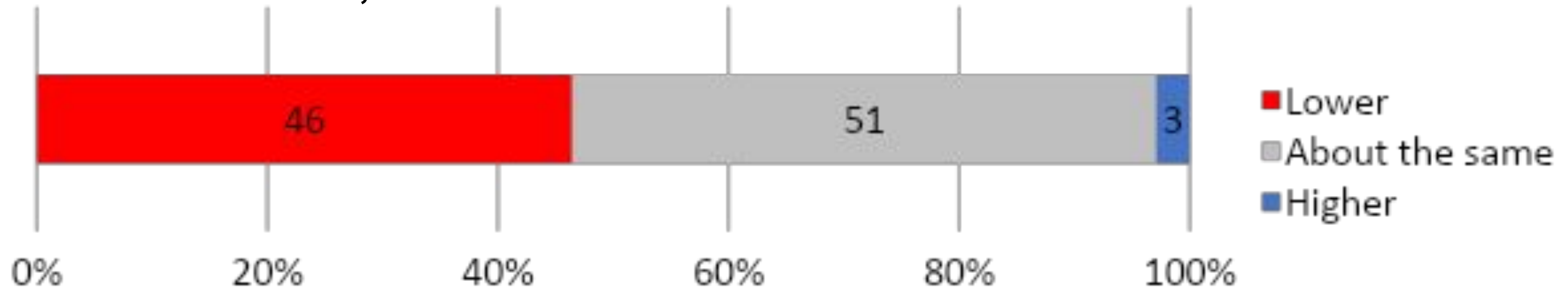
Table 1. Average paddy buying prices, rice selling prices, and miller margins, overall and for main varieties (MMK per pound)

	August survey			July survey		
	Buying price	Selling price	*Margin*	Buying price	Selling price	*Margin*
Overall	136	247	*111*	144	233	*89*
Variety						
Thee Htet Yin	113	208	*95*	128	216	*88*
Yadanar Toe	132	216	*84*	128	207	*79*
Emata	127	226	*100*	140	222	*82*
Yat 90	138	234	*97*	135	225	*90*
Sin Thuka	136	242	*106*	143	232	*88*
Manawthukha	137	254	*117*	139	227	*88*
Paw San Hmwe	176	342	*166*	209	329	*120*

Key results - 2 : Throughput was lower in August compared to 2019

- 46% of mills reported lower milling volumes compared to same time in 2019
- Median decrease was 30%
- Implies lower supply of milled rice, other things equal

Figure 1. Changes in daily rice throughput volumes in August 2020 compared to the same time in 2019, share of mills

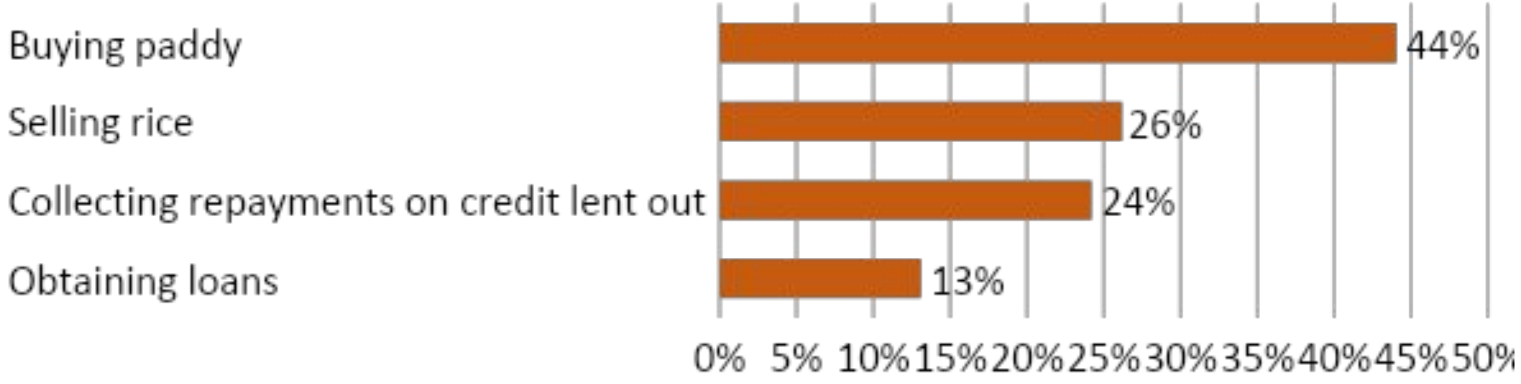


Source: Rice millers phone survey – August 2020 survey round

Key results - 3 : Buying paddy was main challenge for rice mills in August

- 44% of rice millers reported challenges buying paddy
- 26% reported disruptions to rice sales
- The difference suggests greater challenges in reaching rural area, perhaps caused by transportation restrictions

Figure 2. Main disruptions to rice milling business from COVID 19 crisis, share of respondents reporting disruption in the 30 days prior to interview



Source: Rice millers phone survey – August 2020 survey round

Recommendations summary

- Continue and expand the government relief loan program offered to small and medium enterprises – CERP Action 2.1.1.
  - There is a clear demand for credit as 38% of mills interviewed applied for loans in the August survey round.
- Coordinate movement and transportation restrictions to facilitate sales of monsoon harvests.
  - It is essential for rural livelihoods that farmers are able to sell their monsoon paddy, and even before the lockdowns and restrictions put in place to mitigate further transmission of COVID-19’s second wave, millers had difficulty buying paddy.
- Promote safety practices for rice millers and all businesses; in particular, face coverings and social distancing for both employees and customers should be emphasized.
  - The latter had an alarmingly low adoption rate by millers in August.
  - Low-cost and fast information dissemination tools like Facebook should be utilized regularly.

Survey Outputs

- August (Round 2) Policy Note [link]
- July (Round 1) Policy Note [link]

Myanmar COVID-19 Phone Surveys:
Agricultural Commodity Traders

MAPSA- Crop traders

Photo Credit: Mongkolchon Akesin /Shutterstock

	Dates	#
Round 1	May 28-31	154
Round 2	June 29 - July 2	132 (16)
Round 3	Aug 2 – 6	98
States and regions: Shan, Mandalay, Sagaing, Magway		

<u>Survey objectives</u>

- Identify and monitor COVID-19 effects on crop trading

<u>Survey outputs</u>

- Round 1 policy note
- Round 2 policy note
- Round 3 policy note

Survey design

Objectives:
- Identify and monitor COVID-19 effects
- Learn about business responses
- Track commodity sales
  - Monthly changes
  - Year-over-year comparisons

Survey design:
- 150 respondents from previous in-person 2017-2018 surveys in Shan, Mandalay, Magway, Sagaing
- Qualitative interviews with 6 traders at land borders to China, India, and Thailand

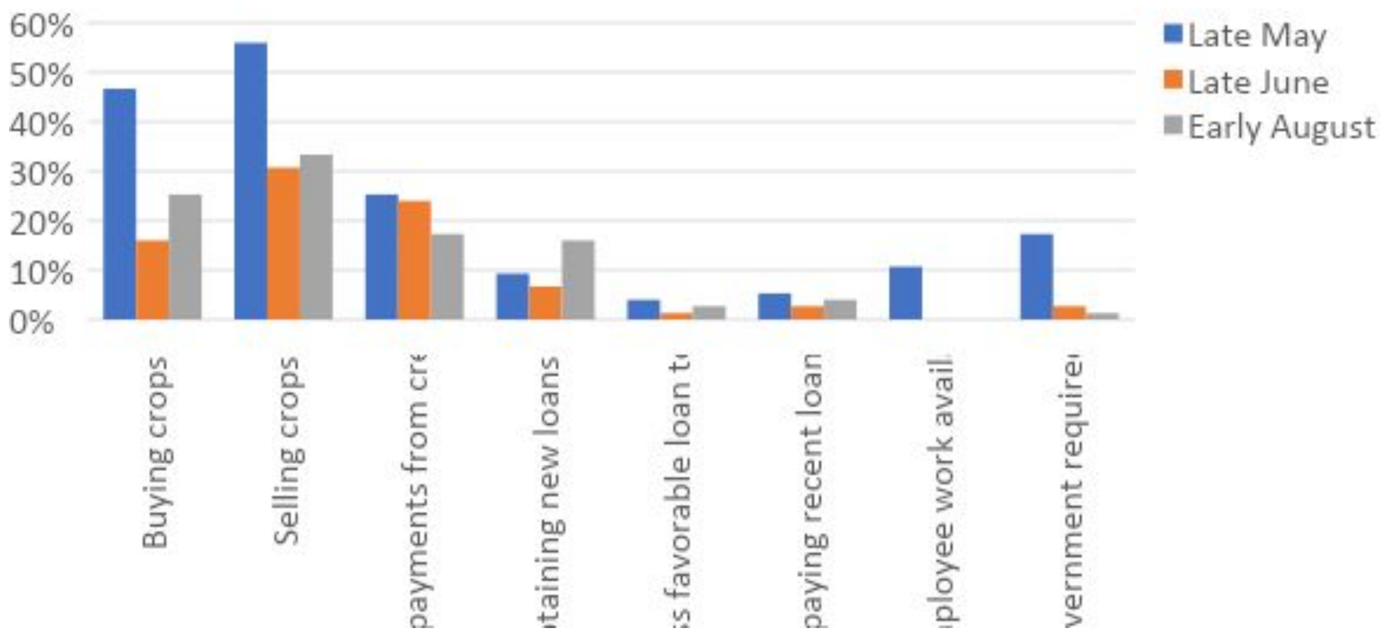
Questionnaire content
- Impacts on profits, affordability, demand
- Major constraints on doing business
- Border trade information

	Crop traders
States & Regions	Shan, Mandalay, Magway, Sagaing
# of respondents	150 (+6 qualitative)
Survey timeframe	June – August, monthly
Pre-C19 study	2017/18

Key results – 1: COVID-19 disruptions by round

- The percentage of traders who reported that the global pandemic is affecting their business in any way declined from 77% in late May to 43% in early August.
- In early August, the most common disruptions were
  - marketing (33%)
  - buying (25%)
  - collecting repayments from credit lent out to farmers (17%)

Figure 1. Effects of COVID-19 on agricultural traders in the 30 days prior to interview, by survey round

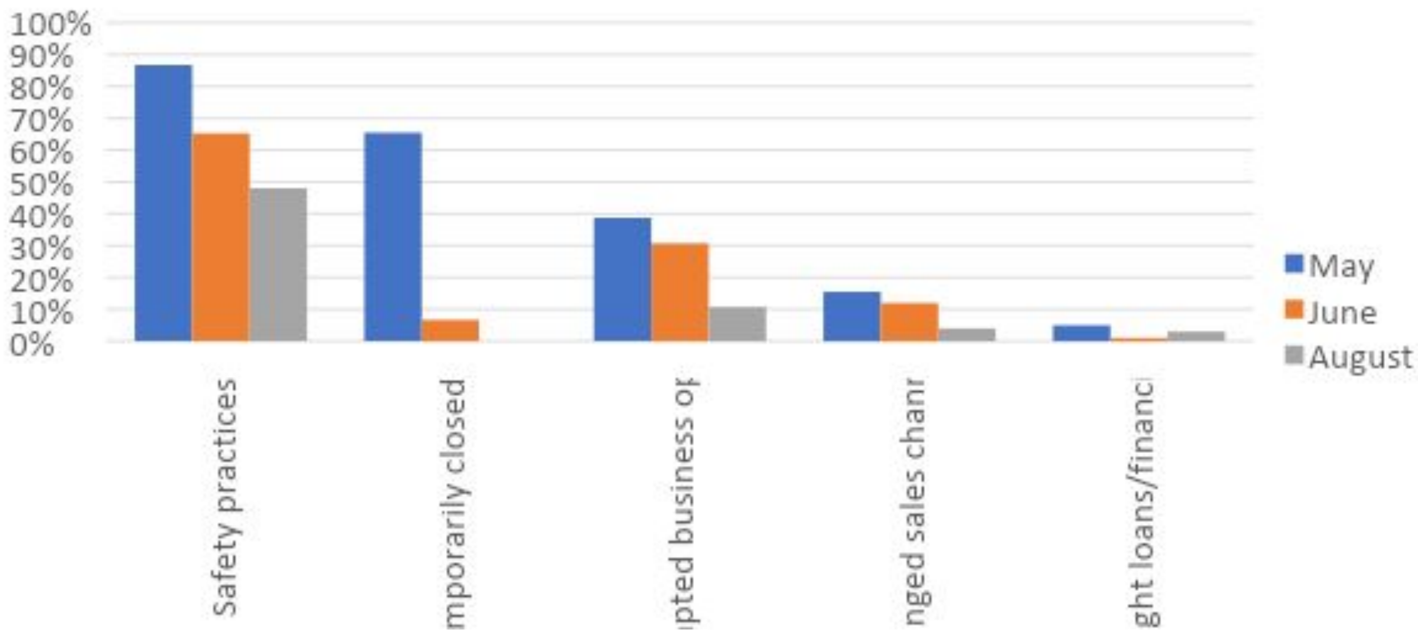


Source: Trader phone surveys, May, June, and August 2020

Key results – 2: Business responses by round

- Safety practices are most common response
    - But dropped troublingly from 87% in late May to just 48% in early August
- Another common response has been to adapt business practices mostly through an increase in mobile phone use to coordinate sales and purchases
    - This has also declined over time

Figure 2. Trader responses to COVID-19 by survey round



Source: Trader phone surveys, May, June, and August 2020

Key results - 3 : Prices were mostly stable, margins decreased

- Trader margins were significantly lower in early August than they were in late May
- Buying prices (typically at the farm gate) and selling prices (typically at commodity exchange centers) have been stable on average

Table 1. Trader margins and buying and selling price volatility estimates, by survey round

	Survey round		
	Late May	**Late June**	**Early August**
Margin ratio[1]			
Mean	0.12	0.09	0.06
Median	0.07	0.10	0.04
Buying price volatility ratio[2]			
Mean	0.17	0.16	0.17
Median	0.10	0.09	0.10
Selling price volatility ratio[2]			
Mean	0.13	0.16	0.15
Median	0.08	0.10	0.08

[1] Margin ratio = (selling price - buying price) / buying price
[2] Volatility ratios = (High price - low price) / low price
Source: Author's calculations from trader phone surveys, 2020

Key results - 4 : Border trade of crops has decreased dramatically

- The qualitative interviews highlight the magnitude of the border-trade disruptions – through both formal and informal routes – caused by the COVID-19 restrictions
  - None of the respondents expects these restrictions to be lifted in time for the coming monsoon harvests.
- The decreased export demand for Myanmar’s agricultural commodities will put downward pressure on prices and have negative effects on Myanmar’s rural economies already hit hard by the COVID-19 crisis.

Table. Estimated border trade volume by month in 2020 compared to 2019 from 6 qualitative interviews with border traders

		Reported border trade volume by month in 2020 as a percentage of 2019 trade volume (0% implies no border trade in 2020)							
Border	Main crops traded by respondents	Jan	Feb	March	April	May	June	July	Aug
China (Muse)	Rice and maize	40%	40%	30%	15%	0%	0%	5%	0%
Thailand (Myawaddy)	Maize, onions, and beans	50%	50%	50%	20%	50%	50%	20%	20%
India (Tamu)	Beans and pulses	73%	73%	0%	0%	0%	0%	0%	0%

Recommendations summary

- Coordinate domestic transport restrictions in response to the recent second wave of COVID-19 to allow domestic trade of agricultural commodities. With the additional COVID-19 income shocks to rural households, it is essential that farmers have access to markets to sell their monsoon harvests.
- Facilitate safe exports of agricultural commodities through main overland trade routes with China, Thailand, and India. To maintain and emphasize safety, this should be done with formal agreements and government investments in monitoring and infrastructure (e.g., storage facilities). If current border closures extend into the monsoon harvest season, the situation will negatively affect traders and reduce the prices farmers receive for their harvests.
- Quickly expand working capital loan provision to crop traders (CERP Action 2.1.1). This could help traders continue their buying activities through the coming monsoon harvests and prevent a possible decline in competition in the sector.
- Continue the waiver of the 2% withholding tax for crop traders (CERP Action 2.1.3).

Survey Outputs

- Synopsis June-August (Rounds 1-3) Policy Note (link)
- Late June (Round 2) Policy Note (link)
- June (Round 1) Policy Note (link)

- More notes and results are available at this link