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Willem van der Pijl is a consultant and business developer for the Agricultural Economic Institute of Wageningen University and Research Centre in the Netherlands.

He has been working as a shrimp industry researcher and consultant in India, Bangladesh, Vietnam, Indonesia and Myanmar with a focus on understanding the dynamics of trade and strategic exporter behavior.

He is specialized in supply chain dynamics and also has experience in the European shrimp market.



Marine Shrimp Farming In Myanmar

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Marine shrimp farming in Myanmar

An adventurous but high potential journey

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An adventurous journey

A large potential but many hurdles to overcome

Myanmar has proven the potential of marine shrimp farming

- SEAFDEC support to shrimp farming development
 - Introduction of improved extensive systems
 - Introduction of (semi-)intensive technology

| No | Year | Extensive (mt) | Improved Extensive (mt) | Semi-Intensive (mt) | Total (mt) |
|----|--------------------|----------------|-------------------------|---------------------|------------|
| 1 | 2000-2001 | 3629.34 | 2359.95 | 1484.61 | 7473.90 |
| 2 | 2001-2002 | 4100.59 | 3366.79 | 3889.20 | 11357.08 |
| 3 | 2002-2003 | 6785.47 | 6009.55 | 6325.76 | 19120.78 |
| 4 | 2003-2004 | 6878.69 | 6016.75 | 6325.76 | 19221.20 |
| 5 | 2004-2005(January) | 3530.37 | 13147.10 | 6731.22 | 23408.60 |

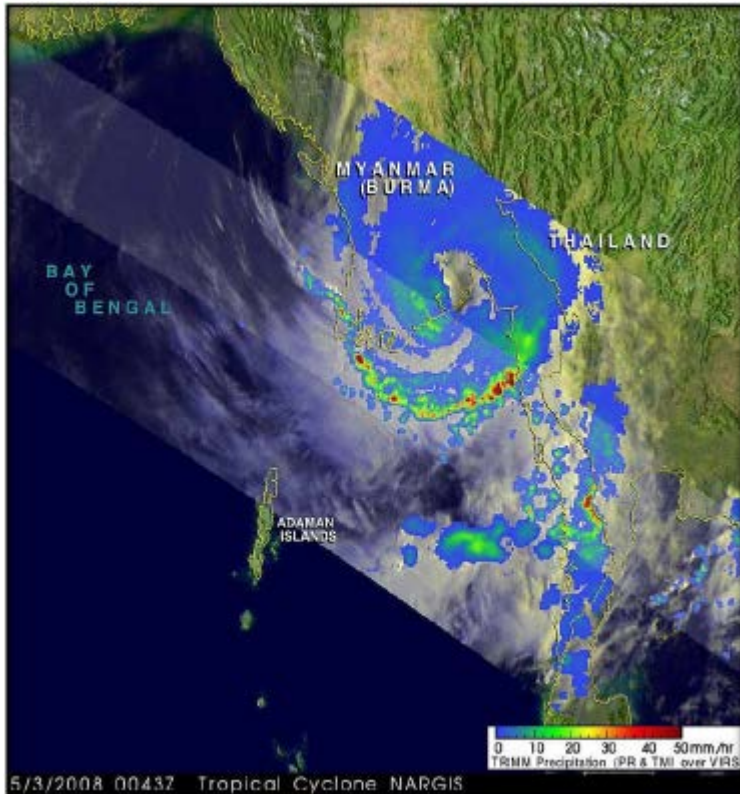
Two types of production developed



- Modified extensive production in Rakhine and South Ayeyarwaddy
- Semi intensive shrimp farming zones in Yangon and Ayeyarwaddy

Two cyclones resulted in production crash

2008



2010



Producers were forced to look for alternatives

1. Monodon productivity back to pre-2000 levels
2. Vannamei production limited to domestic market



Political situation prevented a revival

- International boycott
- Export tax of 10%
- No GSP status in EU and US
- High production costs due to lack of electricity

Political and economic reforms result in new opportunities

- Reduced export tax from 10 – 2%
- Preferential tax status in EU and US
- Reform of investment regulations
- EU re-approval for aquaculture products
- Increasing donor support
- SME's, associations and professionals



The most important investment opportunities are

- Hatchery capacity
 - For Monodon as well as Vannamei
- Grow out
 - Increase of semi-intensive production area
- Feed improvement
 - Improved feed formulations

Private frontrunners are making investments

- Hatcheries in Ayeyarwaddy
- Farms in Ayeyarwaddy and Yangon
- Processing and sourcing

First international donor programs have started

- Water Management and Disaster Risk Reduction
- Setting up the monitoring residue plan for EU approval
- Developing an export strategy
- Capacity building within the DoF
- International match making and program development

Thank you for your attention

For further information or
available reports please
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