



EE361: ECONOMICS OF CLMV COUNTRIES

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“Challenges in Agricultural Developments in Myanmar after Economic Reforms in 1987”

GROUP 10

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Background

The economic reform in Myanmar in 1987 was a significant step towards a market-oriented economy. The government of Myanmar, then known as Burma, implemented the reform to address the country's economic crisis. The reform included the devaluation of the Burmese currency, the kyat, and the liberalization of the economy. The government also allowed private businesses to operate in the country, which was previously not allowed. The reform was successful in stabilizing the economy and attracting foreign investment. However, the benefits of the reform were not evenly distributed, and the country's political situation remained unstable.

The reason why this reform is important is that it marked a paradigm shift in Myanmar's economic policy. The country's previous economic policies were based on socialism and state control of the economy. The reform was a move towards a market-oriented economy, which allowed private businesses to operate in the country. Apart from the industrial reasons, the overall quality of life of people can be improved from the reform through a more developed agricultural sector as well since it is a major source of income, the main share of the gross domestic product (GDP), and the majority of employment. In 1987, the policy of liberalization orientated Myanmar laws toward an open market. In other words, the government has been working to improve the agricultural sector by providing farmers with better access to credit, improving infrastructure, and increasing the use of technology. The Minister of Agriculture in Myanmar back in 1987 classified the five principles, in order to complete the three main basic objectives. Their principles to increase agricultural development are the newly developed agricultural land, the provision of adequate irrigation water, support for increased agricultural mechanization, the acceleration of technology transfer, and the development and utilization of high-yielding quality seeds. If they were able to follow these instructions, they are expected to complete the three objectives as well, which are, (i) To achieve surplus paddy production, (ii) To achieve self-sufficiency in edible oil, and (iii) To step up the cultivation and export of pulses and industrial crops (Myat Thein, Muang Muang Soe, 1998).

The reform was successful in stabilizing the economy and attracting foreign investment, which helped to create jobs and improve the standard of living for many people in Myanmar. According to the statistics from the historical perspective, after 1987, the growth rate and value of production increased and recovered from the poor performance before the new macroeconomic policies. During 1993/1994 and 1994/1995, we can say that the performance was even at a better state (In this case, the growth rate was 7.2 percent) than once achieved in 1985/1986. However, the rate grew slower to 5.5 percent in 1996/1997 due to flooding in three main paddy-growing areas. In fact, the environment and being vulnerable to natural disasters always impede the GDP of Myanmar to grow continuously because 1996/1997 is not the only case that happened. During 1991/1992 the severe flooding also interrupted the recovery process of the GDP dropping in 1988 as well.

	Value		Growth Rate										Value	
	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96	1996/97	1996/97(p)	
Goods	34,300.6	-0.9	-4.9	-13.3	6.5	2.6	-1.5	10.6	6.0	6.9	6.7	6.2	42,934.2	
1 Agriculture	22,243.5	0.4	-6.4	-13.2	5.2	2.0	-3.9	12.4	4.7	6.7	5.5	3.7	25,691.2	
2 Livestock & Fishery	3,981.9	1.9	4.1	-10.5	-4	-0.6	5.7	4.5	3.0	6.0	3.0	9.7	5,010.8	
3 Forestry	757.7	-5.0	-4.3	-1.6	28.4	8.3	-1.7	-4.0	-0.2	-14.3	-3.9	1.5	756.3	
4 Mining	533.5	-6.6	-13.8	-20.1	30.6	-1.2	10.9	10.8	21.9	14.9	15.0	9.5	947.3	
5 Processing & Manufacturing	5,561.4	-7.9	-5	-15.9	11.3	0.1	-4.0	10.5	9.7	8.5	7.5	5.2	6,509.8	
6 Power	278.0	4.0	4.2	-5.9	14.1	5.0	6.7	15.8	23.7	4.8	6.6	7.9	713.5	
7 Construction	944.6	0.2	-5.1	-23.4	32.7	35.8	17.1	11.2	11.7	15.7	27.2	24.5	3,305.3	
Services	8,300.0	3.6	3.1	-3.3	-7.5	4.2	5.1	5.4	6.9	10.0	9.2	6.3	12,716.8	
1 Transport	2,010.4	-0.3	1.5	-17.5	9.7	3.5	5.8	8.3	8.1	11.2	7.3	4.5	2,995.9	
2 Communication	207.7	22.7	14.9	6.2	11.6	3.9	16.5	10.9	9.4	20.4	22.1	9.0	921.7	
3 Financial Institutions	1,332.3	6.7	5.4	7.1	-85.7	16.7	17.9	20.0	37.2	47.3	34.8	18.2	1,179.6	
4 Social & Administration	2,567.8	3.6	3.2	1.5	17.9	4.2	4.3	2.9	4.9	6.8	5.5	4.7	4,650.1	
5 Rental & Other Services	2,181.8	3.6	1.6	-4.2	1.5	3.5	2.5	3.8	3.7	4.0	6.3	5.8	2,969.5	
Trade	13,388.7	-4.2	-6.5	-12.0	5.3	2.4	-2.5	8.8	5.0	7.0	5.6	4.4	14,934.6	
GDP	55,989.3	-1.1	-4	-11.4	3.7	2.8	-0.6	9.3	5.9	7.5	6.9	5.8	70,585.6	

NOTE: (P) denotes provisional data.

SOURCES: Various issues of the *Review of the Financial, Economic and Social Conditions*.

Table (i) shows that Agriculture has the highest value to Myanmar's GDP compared to other goods and services and after the flooding crisis that caused the growth rate to dip down, Myanmar's agricultural sector has always been in a rising trend, especially in the early 1990s.

Myanmar's agricultural industry can be divided into three sectors: crop production, livestock, and fishing. In terms of Myanmar's main crop production, it is renowned for its production of rice, which remains the country's most crucial agricultural commodity. Other main crops include pulses, beans, sesame, groundnuts, sugarcane, lumber, and fish. For an agricultural country that relies heavily on variables like climate changes and monsoon rains, economic development, and organized policies are very crucial for them. The fact that Myanmar is an export-oriented country that relies on exporting products from agriculture makes the importance of this sector even more clear.

<i>Commodity</i>	<i>1985/86</i>	<i>1991/92</i>	<i>1992/93</i>	<i>1993/94</i>	<i>1994/95</i>
Agricultural Products	1,088 (42.40)	1,011 (34.55)	1,299 (36.18)	1,358 (32.12)	2,478 (45.85)
Animal and Marine Products	38 (1.48)	160 (5.47)	261 (7.27)	373 (8.82)	622 (11.51)
Forest Products	1,051 (40.96)	943 (32.23)	1,120 (31.20)	1,357 (32.10)	1,205 (22.29)
Minerals and Gems	206 (8.03)	111 (3.79)	155 (4.32)	364 (8.61)	222 (4.11)
Others*	183 (7.13)	700 (23.92)	755 (21.03)	776 (18.35)	878 (16.24)
Total	2,566	2,926	3,590	4,228	5,405

NOTES: Figures in parentheses show percentages.

* Exports on shipment basis. Includes border trade.

SOURCE: Ministry of National Planning and Economic Development.

Table (ii) shows the comparison between the main products that Myanmar had been exporting, which shows that agricultural products and forest products dominate the proportion before the policies, but after the reform, agricultural products is the sole leader in terms of a share of export products, which means that the agricultural sectors were improved in term of quantity and importance for the economy of the country.

Statistically, economic reform affects key changes in these sectors significantly. Policies like the decontrol of the price of major agricultural products, the removal of restrictions on private sectors participation in both foreign and domestic trade, and the regularization of borders, were announced by the government and, as a result, the agricultural sector of Myanmar was changed how it was operated since then due to more distribution of farm inputs and freedom of farmers about what crops they would like to grow. The GDP share of the agricultural sector increased significantly during the recovery period, from nearly 40 percent in 1985/1986 to nearly 54 percent 10 years later.

Although these policies further the progress of transforming to being a developed country for Myanmar, It is still a long way to go until now. Many issues occur after the economic reform that interrupt the sustained growth of Myanmar's agricultural sector, for instance, the efficacy of edible oil, which leads to the question of whether the import of self-sufficient edible oil, the need to give the adequate incentives to farmers, the wrong focus of the development that the government strategy prioritize new agricultural lands rather than increasing the yields, lack of farmer's access to adequate

credit, the matter of achieving growth with equity, isolation from the global economy, and poor government management overall.

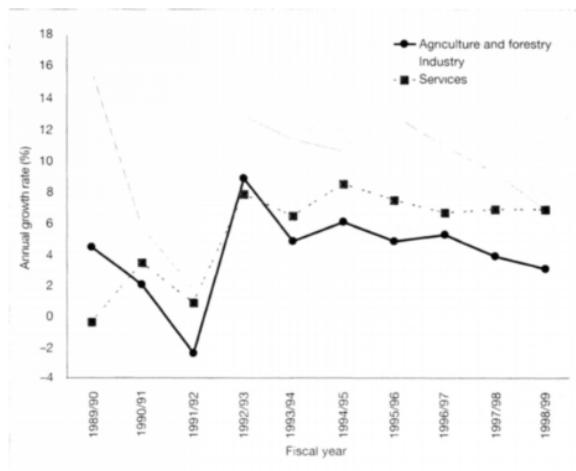
The main purpose of this paper is to first indicate the impact of economic reforms on the agricultural development in Myanmar during the 80s, Then explore the issues of why The economic reforms in 1987 in Myanmar cannot transform the country to be like other developed countries in Asia like China, Singapore, Japan, South Korea, or even develop as much as other developing countries in the South-East Asia region, like Thailand, Malaysia, or Vietnam. identify the cause of problems, then analyze and measure the effectiveness of how the government utilizes the strategies and policies to try to overcome those obstacles. Therefore, we will be able to learn from the case in the past and study how it can apply to today's situation since Myanmar is still relatively slow in terms of development and progresses with other countries in the CLMV group.

Key Issues and Challenges

The economic reform in Myanmar (formerly known as Burma) aimed to transition the country from a centrally planned economy to a market-oriented one in which the government decided to relax their monopoly restrictions in agricultural markets such as rice and some other dominant crops in order to encourage more market activity for both private and foreigner and be able to trade internationally more in the year of 1987.

Although the government tried to reform their economy, there are some key issues of the economic reform in Myanmar in 1987 was the need to transition from a centrally planned economy to a more market-oriented one. The reform included liberalizing trade and investment, privatizing state-owned enterprises, and deregulating industries to encourage competition and innovation within agriculture. However, there still is a huge question from both domestic and foreign countries whether this development was able to create and push economic growth in a sustainable way or not when considering long-term management and equity.

In fact, agricultural products have better performance and trends after the reform, but the high rate of growth is questioned whether it can be sustained in the longer term. To put it in another way, sustainable growth with equity needs to be achieved in order to actually develop the performance of the agricultural sector in the future.



SOURCE: Ministry of Agriculture and Irrigation, Yangon.

Table (iii) shows that although there are overall increases in terms of the annual growth rate of the agricultural sector in Myanmar, the growth started to decline continuously from 1992 to 1999, especially after the 1997 Asian economic crisis.

Scrambling for food from farmers and the need for beneficial incentives for farmers

One issue that needs to be addressed is concerning whether there was a conflict between scrambling for food from farmers or the agriculture sector in a compulsory manner and the need to give enough beneficial incentives to farmers as well. As a result, the government policies in terms of the compulsory purchase system did not prevent paddy cultivators from a higher proportion of production each year, instead, it was only focused on MAPT where they created a fairly flexible adjusted agricultural price along with the increasing market price against the number of compulsorily procured on a per acre basis that been decreased. According to this factor, there might be a serious issue if the procurement price of paddy is at a fixed rate in the long term like in the past.

Isolation from the global economy

One major issue was the country's chronic underdevelopment and isolation from the global economy. Myanmar's economy was highly regulated and closed off to foreign investment, and its infrastructure was inadequate, with poor transportation networks and unreliable electricity supply. The isolation from the global economy makes Myanmar unable to unleash its full potential as one of the biggest rice producers in Southeast Asia. Although they are the largest rice exporter in its area, it is still not significant in the world market. The country faced trade sanctions from Western countries due to its human rights record and lack of democratic governance. Therefore, for these reasons, it's causing foreigners not to invest within the country due to the difficulty and improper management that encourage foreigners' investment. This causes the agriculture sector as there is a lack of capital in order to generate and develop in this sector area which is the main income of citizens.

Providing adequate incentives to farmers

Another critical issue to consider is whether there is a conflict between mandating food from the agricultural sector and the need to provide adequate incentives to farmers. During that period, the compulsory purchase system has not prevented paddy cultivators from increasing their output year after year. However, this is only because, on the one hand, MAPT has been fairly flexible in adjusting its procurement price in line with market price increases, and on the other hand, the amount compulsorily procured per acre has also been reduced. As a result, as long as this type of intervention is gradually reduced, it will be a non-issue. It will also be consistent with one of the four primary economic goals of a properly evolving market-oriented system. However, it should not be forgotten that if the procurement price of paddy is fixed for years on end, as in the past, it will become a very serious issue once again.

Developing new agricultural lands rather than increasing yields

Another critical issue to consider is the strategy of developing new agricultural land rather than increasing yields. The agricultural sector's development has so far been in terms of acreage expansion, despite the fact that there is just as much potential for increasing yields. Which method or strategy is superior? This is a regional or spatially specific question. Acreage expansion would be preferable in some areas while increasing yields would be preferable in others. There may be areas where both approaches would be effective. The important thing is to conduct agronomic, financial, and economic analysis on a

region-by-region basis to determine which approach is best while keeping equity in mind. To use summer paddy as an example, a regional cost-benefit analysis can help determine where it would be truly beneficial and where the costs, either financial or economic, would outweigh the benefits.

The strategy to develop new agricultural lands rather than increasing yields make the growth rate increase rapidly in the initial period because new land expansion dramatically increased the quantity of the products and output. However, the fact that the yield has not improved makes the growth unsustainable. We can see from **Table (iv)** that Myanmar's average annual growth rate of agricultural output per capita decreased the most compared to its neighboring countries, from 2.8 to 0.7.

	Average Annual Growth Rate of Agricultural Output per Capita		Paddy Yields (tons/acre) 1994-96
	1974-84	1985-96	
Indonesia	2.2	1.6	1.78
Malaysia	1.0	1.3	1.25
Philippines	0.7	0.6	1.00
Thailand	1.8	0.7	0.86
Vietnam	2.8	2.4	1.28
Myanmar	2.8	0.7	1.07

SOURCE: Calculated from the Food and Agricultural Organization, *Production Yearbook* (1985, 1996).

Table (iv) shows the comparison between average annual growth rate of agricultural output per capita in countries in south east Asia.

Deforestation

Myanmar's forests cover around half of its total area. However, agricultural encroachment, commercial logging, and cutting of fuelwood increasingly threaten these forests. According to the World Resources Institute, from 1980 to 1990, East Asia experienced the highest rate of deforestation in the world, at 1.4 percent per year. Deforestation will lead to lower quality of soil and its erosion. As a result, agricultural lands are more vulnerable to natural disasters, which causes a flood to hit harder compared to the areas where the soil is in good condition. In fact, this is one of the reasons why Myanmar's growth during its rising phase of output cannot continue smoothly because there was a phase where the performance of the agricultural sector flopped due to floods.

Corruption

Finally, the government had to address the issue of corruption and cronyism, which had been pervasive under military rule. This involved introducing new laws and regulations to improve transparency and accountability, as well as working to change the culture of corruption that had become ingrained in the country's economic and political systems.

Overall, the economic reform in 1987 focused on the transition of the market which then we continue to talk about the agriculture sector. The key issues which led to the unsuccessful agricultural reform are underdevelopment and isolation from the global economy, highly regulated and closed off to foreign investment, and lack of credibility to attract foreign investors. Also the conflict between mandating food from the agricultural sector and the need to provide adequate incentives to farmers. Furthermore, apart from these reasons, there is also the key factor in terms of the government's strategy as

well in terms of the development of new agricultural land or increasing yield as it needs to be specified for each different area. The improper management may lead to inefficient agricultural investment. Therefore, these key reasons lead Myanmar not to be able to develop its agriculture efficiently and sustainability.

Government Policies

The Southeast Asian nation of Myanmar has been cut off from the world economy for a very long time because of political unrest and poor economic management. However, the nation has recently put in place a number of policies designed to lessen its protracted seclusion and foster greater economic growth and development.

Economic liberalization is one of the most important adjustments Myanmar has made to its policies. The nation started the process of opening its economy to international trade and investment in 2011. This included the elimination of numerous trade and investment limitations and the development of an atmosphere that was more conducive to business. Foreign direct investment in Myanmar has considerably increased recently as a result of these changes, especially in industries like manufacturing, tourism, and infrastructure.

Policies to help Myanmar more connected with the world market

Myanmar has also prioritized infrastructure development as a means of improving its connectivity with the rest of the world. This includes the construction of new roads, railways, and airports, as well as the expansion of telecommunications networks. These infrastructure projects are designed to improve Myanmar's connectivity with neighboring countries and facilitate greater trade and investment flows.

In addition to these domestic policy changes, Myanmar has sought to increase its integration with the ASEAN region through initiatives such as the ASEAN Free Trade Area (AFTA) and the ASEAN Economic Community (AEC). These initiatives aim to promote regional economic integration and reduce trade barriers between ASEAN member states. By increasing its economic ties with its neighbors, Myanmar hopes to further reduce its isolation and promote greater economic growth and development.

Myanmar has also actively sought to attract foreign investment in recent years. The government has implemented a range of policies to encourage foreign investment, including tax incentives, streamlined bureaucratic procedures, and greater legal protections for investors. These efforts have helped to increase foreign direct investment in Myanmar and promote greater economic growth and development.

Finally, Myanmar has undergone significant political reforms in recent years, including the transition to a civilian government in 2011 and the holding of free and fair elections in 2015. These reforms have helped to improve the country's image in the international community and create a more stable political environment for foreign investors.

Overall, Myanmar's policies to reduce its chronic isolation from the global economy have been largely successful. Economic liberalization, infrastructure development, regional integration, foreign investment, and political reforms have all contributed to greater economic growth and development in the country. However, challenges remain, particularly with regard to infrastructure development and the need for further economic reforms to create a more competitive and diversified economy. Myanmar will need to continue to implement these policies and address these challenges in order to fully realize its potential as a member of the global economy.

Policies to help with insufficient structure and economic sanctions

For insufficient infrastructure, Myanmar has implemented a range of policies to address insufficient infrastructure, including increased investment in infrastructure, prioritization of infrastructure development, regional cooperation, public-private partnerships, and legislative reforms. These policies have contributed to greater infrastructure development in the country, but challenges remain. Myanmar must continue to implement these policies and address financing and coordination challenges to fully realize the potential of its infrastructure for economic development.

Myanmar has faced economic sanctions from the international community for many years, which have significantly hindered its economic growth and development. However, the government has implemented a range of policies to overcome these sanctions and promote economic development.

One of the key policies that Myanmar has implemented is the liberalization of its economy. The government has undertaken a series of reforms to open up the economy to foreign investment, reduce trade barriers, and promote competition. These reforms have included the establishment of a new foreign investment law, the liberalization of the financial sector, and the reduction of tariffs and other trade barriers. By liberalizing the economy, Myanmar hopes to attract greater investment and promote economic growth.

Myanmar has also tried to broaden the range of its business partners. Although China has historically been the nation's primary trading partner, it has made efforts to deepen its economic ties with other nations. Along with closer commercial ties with other ASEAN nations, this has also meant more collaboration with India and Japan. Myanmar aims to lessen its reliance on any one nation by expanding its network of economic partners and strengthening its negotiating position in world trade talks.

The government has also focused on improving its business environment. This has included the simplification of regulations and procedures for starting and operating a business, the strengthening of property rights, and the establishment of a new arbitration center. By improving the business environment, Myanmar hopes to attract greater investment and promote economic growth.

Finally, Myanmar has sought to promote domestic economic development. The government has prioritized the development of key sectors, such as agriculture, manufacturing, and tourism. It has also invested in infrastructure development, particularly in the areas of transportation and energy. By promoting domestic economic development, Myanmar hopes to reduce its reliance on imports and increase its export capacity.

Overall, Myanmar's policies to overcome economic sanctions have focused on liberalizing the economy, diversifying economic partners, improving the business environment, and promoting domestic economic development. While these policies have shown some success in promoting economic growth, challenges remain, particularly with regard to political instability and corruption. Myanmar will need to continue to implement these policies and address these challenges to fully realize the potential of its economy.

Myanmar has implemented policies to overcome limited private sector growth, including liberalization of the economy, the establishment of institutions to support the private sector, investment in infrastructure and business environment improvements, and public-private partnerships. These policies have helped create a more stable and transparent business environment and encouraged foreign investment, making it easier for private companies to operate and grow in Myanmar.

Policy to deal with low agricultural yield

Myanmar has implemented several policies to increase agricultural productivity, including increasing investment in the sector, providing access to credit, promoting modern farming practices, supporting agricultural research, and promoting export-oriented agriculture. These policies have helped to improve the productivity of farmers and increase exports, but there is still a need for further investment in the sector to fully realize its potential.

Lesson learned

There are many factors that prevent the sustainable growth of the agricultural sector in Myanmar, both internally and externally. Future policies should deal with both ways sustainably and not only focus on the short-term rapid increase of the output. In order to do that, the government of Myanmar should focus on the policies that strengthen the structure of the country and the backbone of agricultural sectors, which is the most important part of the export of the country. In other words, they should launch policies that emphasize the power of farmers, through access to finance or empowering the quality and quantity of output in the agricultural sector. For instance, mechanization and accessible prices for products related to farming, such as fertilizers. Apart from the internal issues, they also have to keep dealing with external issues as well. Keeping the economy open and finding effective methods to attract foreign direct investment is the key.

Conclusion

In conclusion, the economic reforms in Myanmar in 1987 marked a significant paradigm shift toward a market-oriented economy, aimed at stabilizing the country's economy and attracting foreign investment. However, the benefits of the reform were not evenly distributed, and the country's political situation remained unstable. The agricultural sector, which is crucial to Myanmar's economy, underwent significant changes as a result of the reform, including the decontrol of prices, removal of restrictions on private sector participation, and regularization of borders. Despite these changes, Myanmar still faces several challenges, including chronic underdevelopment, insufficient infrastructure, economic sanctions, limited private sector, and legacy debt. Additionally, corruption and cronyism remain pervasive issues that need to be addressed. Overall, the economic reform in Myanmar was a complex and challenging process that required significant political will, coordination, and planning. While progress has been made, the country still faces many economic and political challenges today.

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