ture, the focus has not yet been explicitly on self-sufficiency, the diversification of agricultural products and crop sequences or income security for farmers.

More recent reform strategies have recommended a (holistic) broadening of focus to embrace the situation in agriculture as a whole, and follow a development path from a household-oriented subsistence economy to a regionally and internationally competitive market economy (Aung Kyi 2006).

The priorities of such strategies are as follows. Firstly, ecological aims are to be pursued, e.g. the establishment of soil protection and erosion prevention policies, measures against soil salination, and the creation of systematic wind barriers. Secondly, from an economic point of view the diversification of the crops cultivated, the consolidation of secondary crops, the reduction of post-harvest losses as well as improved access to loans, the stabilisation of the finance sector and a broadening of farmers and agricultural labourers income basis in agriculture, in association with agriculture and outside of agriculture, are necessary. From a structural point of view, improved land policies and resource development, the provision of transparent market information, a systematic development of human resources and the encouragement of agro-technology are called for. Finally, regionally differentiated improvements are perceived as necessary, rather than (too) general strategies. The main long- and medium-term goal is to achieve significantly improved integration and networking of the eight agricultural zones as well as further development of the endogenous socio-economic potential of the individual regions.

**SUMMER AND RAIN PADDY: PRODUCTION AND YIELDS**

Yields of rain and summer paddy vary considerably depending on natural conditions in and around the individual townships and in particular on soil quality and monthly rainfall.

Nationally, average yields of rain paddy are between 3.5 and 4.5 tons/ha; they are lower in coastal areas and in middle Shan State and significantly lower in the mountainous regions of Chin State, northern Kachin State and Kayah State. Higher yields of up to 8.7 tons/ha are achieved in the Sagaing and Magway Regions and in northern Shan State. Overall, yields are average by comparison with other ASEAN nations (USDA 2015) and stable over the country as a whole.

Yields vary in different parts of the country: yields of rain paddy in the delta areas of the Ayeyarwady and Sittaung rivers and in Rakhine State are high by comparison with the rest of the country and have been rising in recent years (2012-2014) in the core area, while on the coasts they are stable and in some townships of the central dry zone they are falling. Yields have fallen sharply in recent years in Kayin State and Mon State, largely on account of the shortage of labour as a result of the migration of workers to Thailand, lack of access to loans for modernisation and increasing cultivation of other agricultural commodities that command higher prices (all data: MoAI 2015).

Although the volume of summer paddy that is produced is significantly lower than that of rain paddy, the second rice harvest that summer paddy provides is nevertheless important for the national rice supply. Geographically the production of summer paddy is concentrated mainly in the southern Ayeyarwady Delta. Substantial harvests are also achieved in parts of the Magway and Mandalay Regions; productivity is high at between 5.0 and 7.0 tons/ha. Little summer paddy is harvested in other parts of the country, chiefly because of insufficient rainfall and limited capacities for artificial irrigation (all data: MoAI 2015).

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CHANGE OF PADDY YIELD

Development of rain paddy yield from 2012/13 to 2013/14 (in ton/ha)*

-0.9 - 0.3 decrease
-0.3 - 0.1
>-0.1 - 0.1 stable
>0.1 - 0.5 increase
>0.5 - no data

Sources: ADB, 2015, ADB, release April 2014 (modified).

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