



Tha Bar Wa
A sustainable future for industry

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GRANTS PROGRAMME



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the European Union



**IMPACT OF COVID-19 PANDEMIC ON
SMALL AND MEDIUM-SIZED ENTERPRISES
IN FOOD AND BEVERAGE SECTOR,
MYANMAR 2020**

Acknowledgements

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Executive Summary

This report is prepared based on interviews (mostly online) with 49 selected Food and Beverage (F&B) small and medium-sized enterprises (SMEs) from various regions of Myanmar. The study concludes that the COVID-19 crisis had caused a large upset in Myanmar's F&B industry: Two-thirds of enterprises are operating at a capacity of less than 80% whilst over a third report a drop in their operational capacity of at least 50%. Enterprises have struggled due to limited access to customers and financial pressures caused by closure. Nearly two-thirds of F&B enterprises indicated that they have not received any form of assistance from the Myanmar government or industry associations.

The Tha Bar Wa project may be able to find opportunity in this crisis by assisting struggling enterprises through cleaner/greener production practices that also help them economically. In this context, cleaner/greener practices relate specifically to increasing energy efficiency, lowering emissions of wastewater and proper treatment of wastewater before release into the environment. Large proportions of enterprises require financial assistance in the form of additional waivers on tax and government charges and/or other forms of financial subsidies. Green loans from project partner banks can be used to provide the required financial stimulus whilst incentivising more energy efficient and less polluting practices.

Approximately half of the F&B SMEs surveyed are currently implementing measures to reduce energy consumption and emission rates, with a further 42% reported interest in doing the same. In total, 59% of enterprises are interested in cleaner/greener production methods but are either postponing implementation due to financial pressure caused by COVID-19, or lack resources/knowledge required to begin implementation. This provides Tha Bar Wa project with a significant opportunity to assist the F&B sector with training, capacity building activities and links to project partner banks for green loans.

Nearly half of all interested F&B enterprises wish to overcome the current economic crisis before implementing any further environmental measures. To have maximum impact, the Tha Bar Wa project must instead find a way to immediately assist these companies in overcoming the COVID-19 crisis and in doing so promote discussion and implementation of cleaner/greener practices without delay.

The Tha Bar Wa project has an opportunity to reach out to the companies in the F&B sector, offering both assistance in accessing green loans and subsequent technical support for energy efficiency and wastewater treatment measures. The major barrier to the improvement of environmental practices stems firstly from a lack of funding and secondly from a lack of technical knowledge.

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Background and Objective

Since March 2020, the COVID-19 pandemic has impacted the lives of millions of people around the world with dramatic consequences for the economy due to stringent restrictions to slow down the spread of the virus. Since the beginning of the pandemic in March 2020, the government of Myanmar has taken strict measures reaching from complete lock-downs with travel bans and closure of schools, offices and retail, to allowing meetings with a restricted number of people throughout the year 2020.


According to the report ‘Assessing the Impacts of COVID-19 on Myanmar’s Economy’ published by IFPRI, 2020, the national GDP of Myanmar was predicted to fall by 41% during the two-week lockdown period starting in April 2020. In the report ‘Coping with COVID-19 – Myanmar Economic Monitor’ published by the World Bank, 2020, Myanmar’s economy has experienced an estimated growth of 1.7% in the 2019-2020 fiscal year, down from 6.8 % in the 2018-2019 fiscal year with significant contraction shown in September 2020. The World Bank predicts the economy to grow by 2% in the 2020-2021 fiscal year.

The agri-food system (AFS) was predicted by the IFPRI to fall by 24% during the lockdown period. Although the lockdown policies provide exemptions for most agricultural activities, linkages to other sectors indirectly affect the AFS sector significantly. (IFPRI, 2020).

The World Bank report that Myanmar’s AFS has been surprisingly resilient during this economic crisis. “Agriculture output grew by an estimated 1.2 percent in FY19/20, driven by strong crop production— which accounts for over half of total agriculture output—and supported by favourable weather and increased demand for staple foods.” (World Bank, 2020). Whilst growth has remained positive, it is far below growth rates of the 2019-2020 fiscal year.

To manage the situation and to provide immediate relief to enterprises, the Ministry of Planning, Finance and Industry (MoPFI) announced the Immediate Loan Program to ease the economic impact of COVID-19 on industries. It is a one-year loan plan with a one-% interest rate for small- and medium-sized businesses (MoPFI 2020). During this period much research was conducted by various institutions on the impact of COVID-19 to the business sector.

According to the COVID-19 survey report conducted by EuroCham Myanmar in August 2020, the automotive sector is still one of the worst affected industries. The hospitality sector, electronic and engineering, food and beverages, and the investment and marketing industries also count among the most affected sectors in the second quarter of 2020: revenue losses are expected to reach over 50%. The logistics and supply chain sector and health care sector seem to be more spared from the crisis.



The same report indicates that in late April 2020, the government of Myanmar adopted the COVID-19 Economic Recovery Plan (CERP) with the aim of mitigating the impacts of the pandemic on the country's economy. This draft recovery plan is expected as a comprehensive recovery plan measures to improve macroeconomic environment through monetary stimulus, ease the impact on workers, private sector and households and increase access to COVID-19 response financing.

The Tha Bar Wa Project, funded by EU Switch Asia and implemented by WWF, SBFIC and MFPEA, has been set up to promote cleaner production practices amongst SMEs in the food and beverage sector. COVID-19 has affected the implementation of the project activities and thus, the project wanted to better understand the situation on how the pandemic and various restrictions imposed by the Government have impacted small and medium F&B businesses and their willingness to keep investing in green solutions. Hence, the Tha Bar Wa Project conducted research from 20-10-2020 to 25-11-2020 to take stock of Myanmar's F&B companies' current operations, the challenges and impacts of COVID-19 they encounter and their plans to resume normal operation.

This report will summarise the current challenges of COVID-19 for F&B enterprises; requirements of F&B enterprises to mitigate these challenges; and how enterprises may be assisted to improve their energy efficiency and wastewater treatment process during or after the pandemic. With this information, Tha Bar Wa identifies needs of the F&B industry during the COVID-19 pandemic and how the project can best assist enterprises in adopting cleaner/greener production practices.

The Tha Bar Wa project is able to assist enterprises by providing training and capacity building activities including linking them with project partner banks for green loans requirement. The information retrieved from the questionnaire will help to direct effort and resources into the most appropriate need-based solutions.

Methodology

This report is based on a set of semi-structured questionnaires conducted by WWF staff. 80 Small and medium enterprises were randomly selected from the list provided by the Small and Medium Enterprise Development Department and approached for online interviews. Out of 80 approached enterprises, 49 Small and Medium Sized Enterprises (SMEs) participated in the survey.

The survey targeted SMEs in Yangon, Mandalay and the Ayeyarwady Region. The survey covered two different categories of SMEs: 1) SMEs that had previously worked with Tha Bar Wa project and participated in workshops and trainings on various topics on green finance and cleaner production; 2) SMEs who had no relationship with the Tha Bar Wa project in the past.

Out of the total respondents, 30% of the SMEs belonged to the second category and had no connection with Tha Bar Wa Project. 70% of the SMEs had previous relationships with the project.

Among the total interviewed 49 respondents, 51% (25 SMEs) were from Yangon, 45% (22 SMEs) from Mandalay Region and 4% (2 SMEs) of the respondents were from Ayeyarwady region.





The survey covered SMEs from 15 different types of businesses – Bakeries; Biscuits; Milk Dairies; Drinking Water and Juice; Food Stuffs; Fruits preservations; Pickle; Green Tea and Tea Leaves; Vinegar and Sauce; Cold storage; Vermicelli and Rice Noodle; Snacks; Rice Millers; Edible Oil; Coffee. The number of employees from the SMEs surveyed range from 3 to 25 employees.

The survey was conducted online and via telephone (due to the travel restriction) to assess their current operationality, requirements and outlook towards implementing more energy-efficient and less polluting production methods. See appendix for questionnaire details.

Results Chapter 1

Impact of COVID-19 pandemic on the food and beverage industry

This chapter provides findings from the survey in relation to the following areas:

- 1 Status of business operation as compared to pre-COVID-19
- 2 Effect of Pandemic to the businesses
- 3 Perception of enterprises' on growth prospect in 2021
- 4 Measures taken by the enterprises to mitigate the impact of COVID-19
- 5 External support received by the enterprises since COVID-19
- 6 Enterprises' current needs during this COVID-19 situation

Status of Business Operation before and after COVID-19. Of the 49 enterprises interviewed on their operational level as compared to pre-COVID-19 times, 3 reported themselves as fully operational, 1 as non-operational and 45 as partially operational (Figure 1). Of the partially operational enterprises, 15 (31%) reported operational levels of 61-80%. 18 enterprises (37%) reported a serious drop in operational activity of 50% or more (Figure 2).

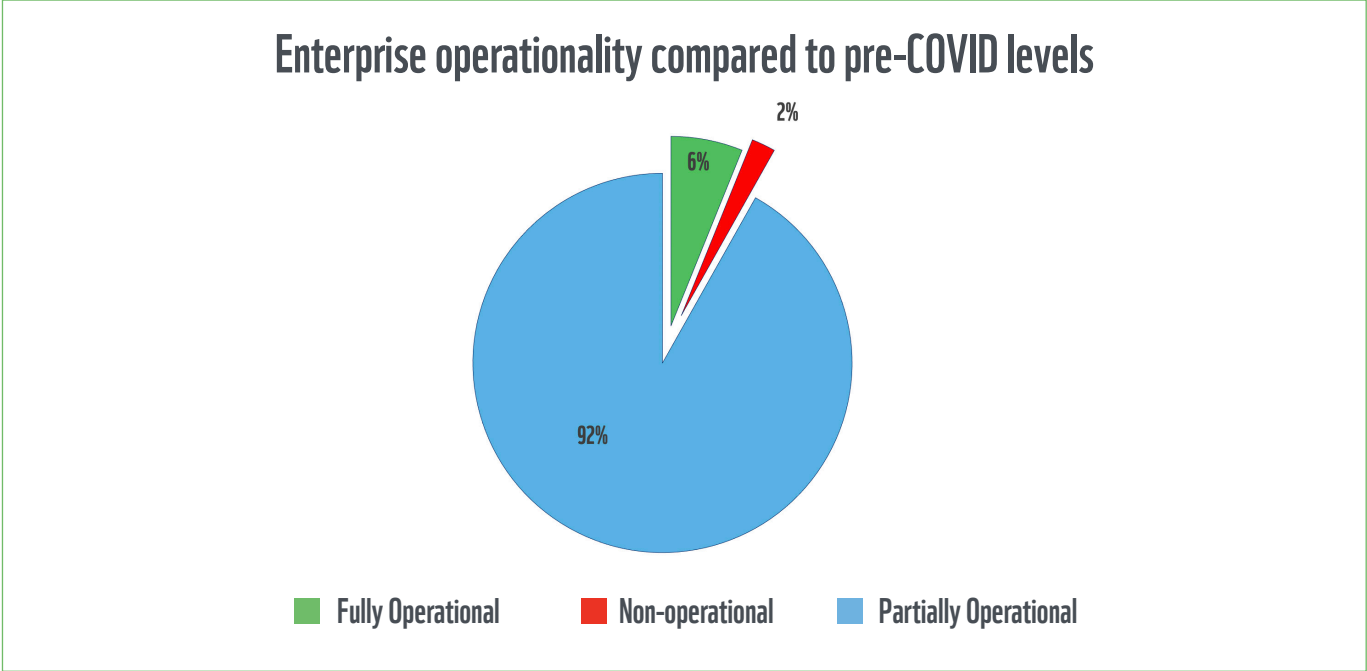


Figure 1 - How is your business operation as compared to pre-COVID-19?

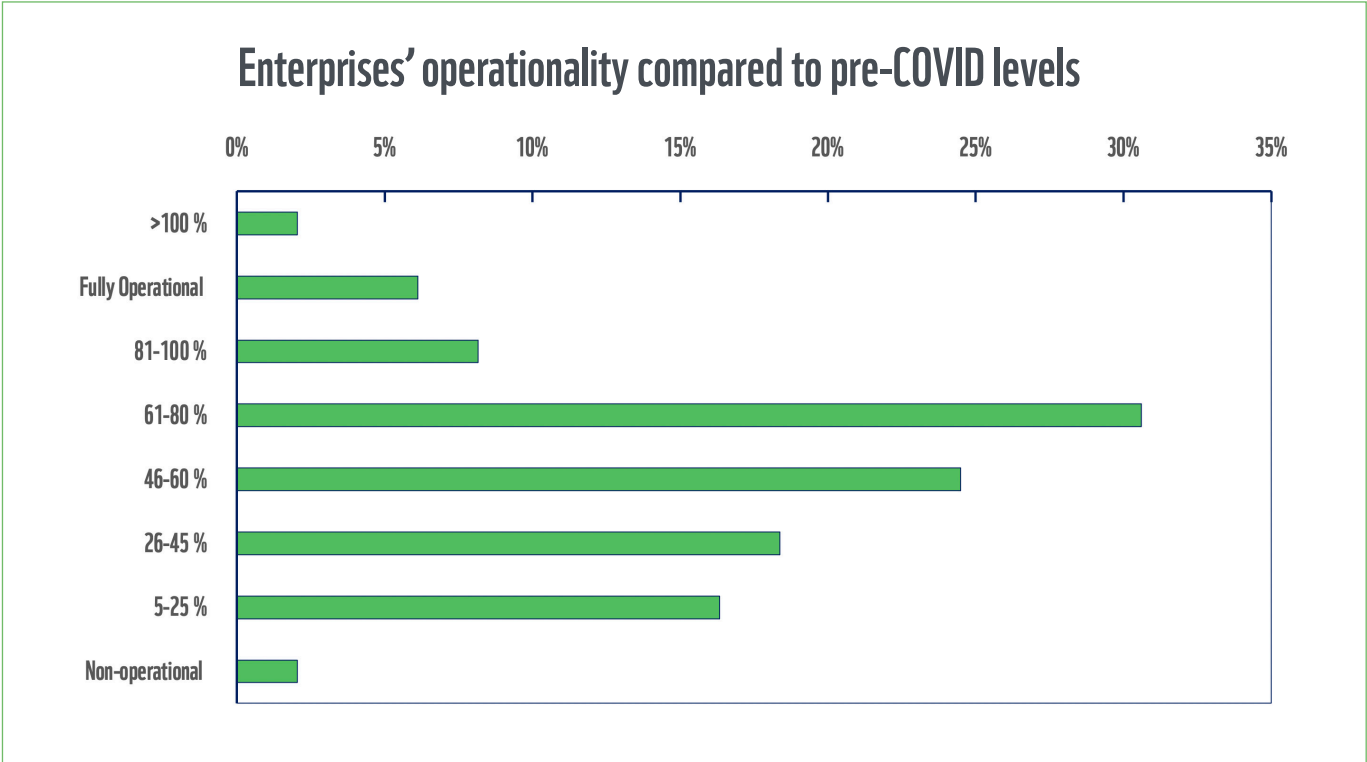


Figure 2 - Operational levels of enterprise respondents.

Effect of pandemic on enterprises. Of the 49 respondents, a majority of 29 enterprises (59%) reported challenges due to limited customer access due to various COVID-19 restrictions. 27 enterprises (55%) reported financial challenges due to closure, lack of working capital and less profit. Fewer enterprises reported any issues regarding workforce availability (7 enterprises, 14%) or challenges in meeting government approval for reopening (8 enterprises, 16%). (Figure 3)

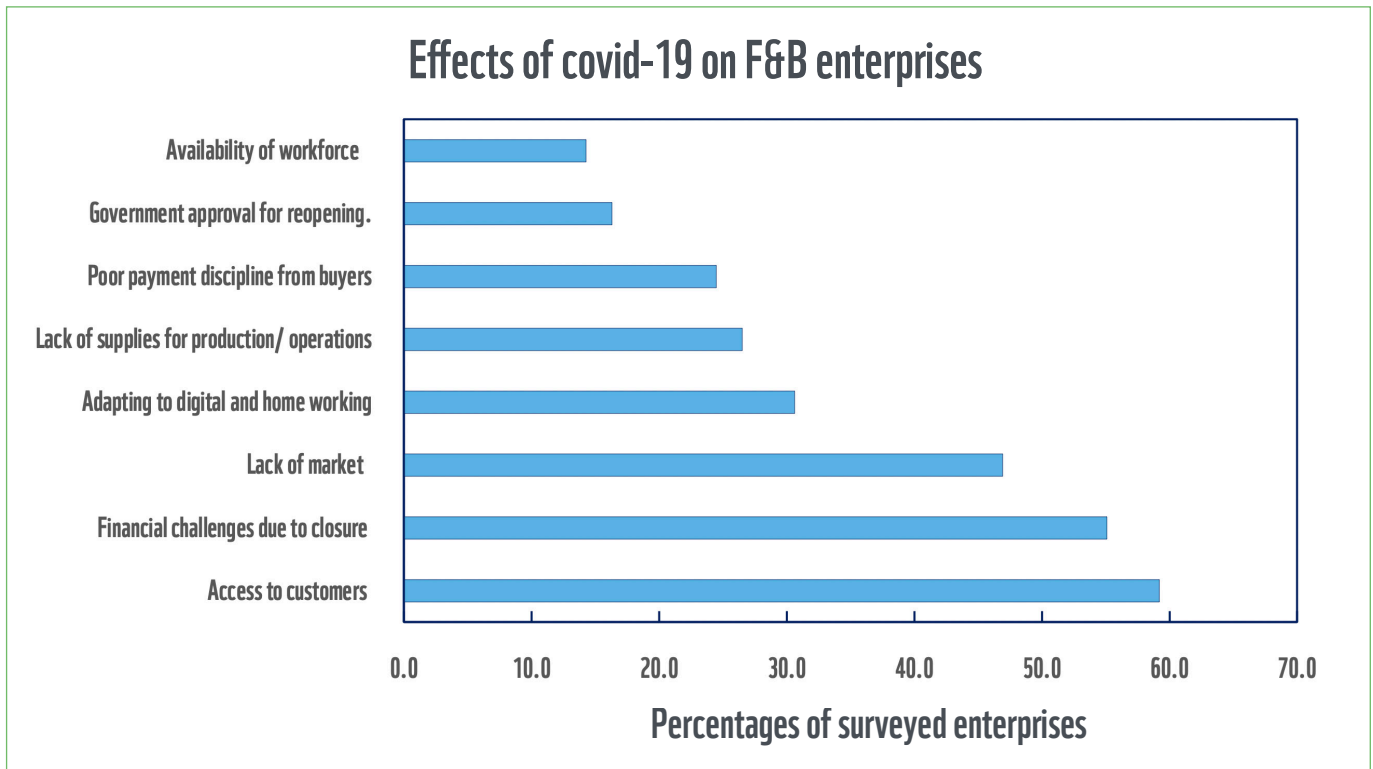


Figure 3 - In what ways has your business been affected by COVID -19?

Growth prospects for 2021. Looking to the future above, 25 respondents (51%) predicted lower growth rates in 2021 compared to 2020, 22 respondents (45%) predicted higher growth rates, 1 respondent predicted similar growth and another 1 respondent predicted other thing (like if education training will change, it may be growth) (Figure 4).

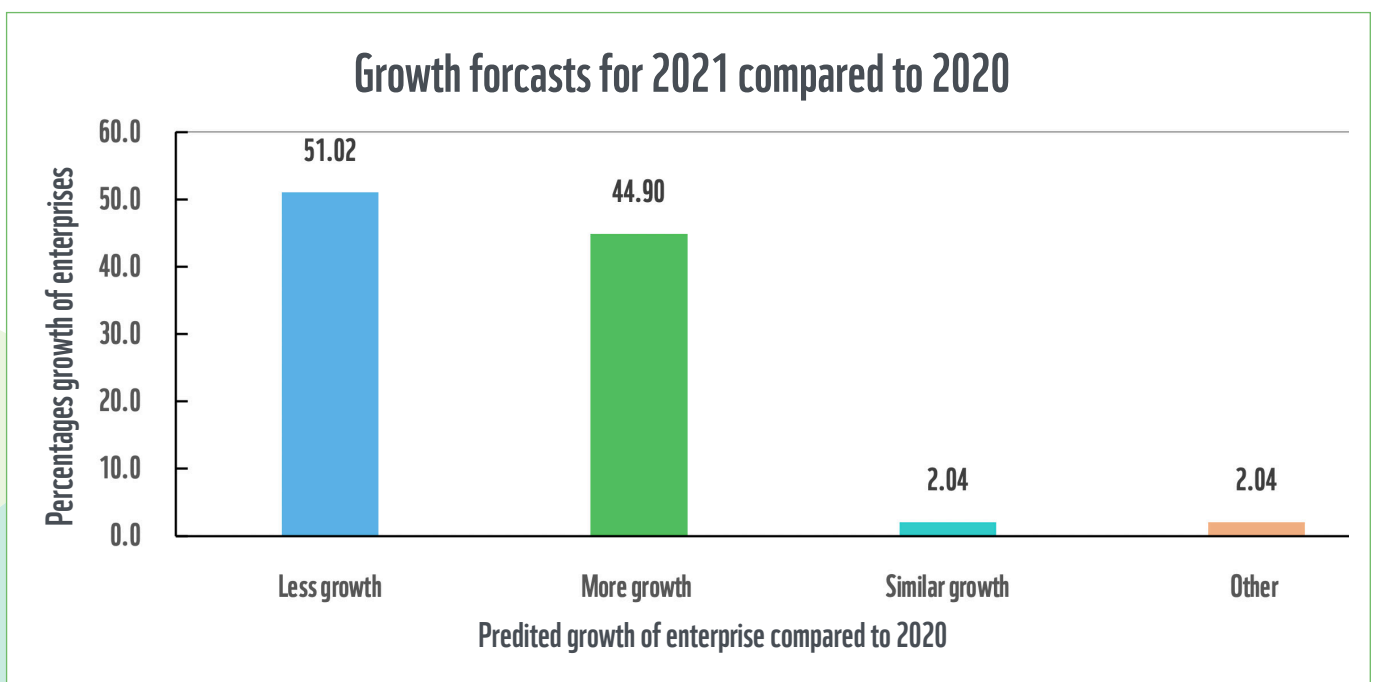


Figure 4 - How do you see the prospect of growth for your business in 2021?

Measures taken to mitigate the impact of COVID-19. As government has imposed various measures for safety, masking and social distancing to reopen the businesses, when attempting to mitigate these challenges, significant proportions of respondents reported enacting safety and hygiene measures for their workforce (37 enterprises, 76%) and obtaining government approval by meeting all the government safety measures (31 enterprises, 63%). Close to a quarter of respondents indicated that they were investing more capital into their enterprises (11 enterprises, 22%) or stockpiling goods (13 enterprises, 27%) (Figure 5).

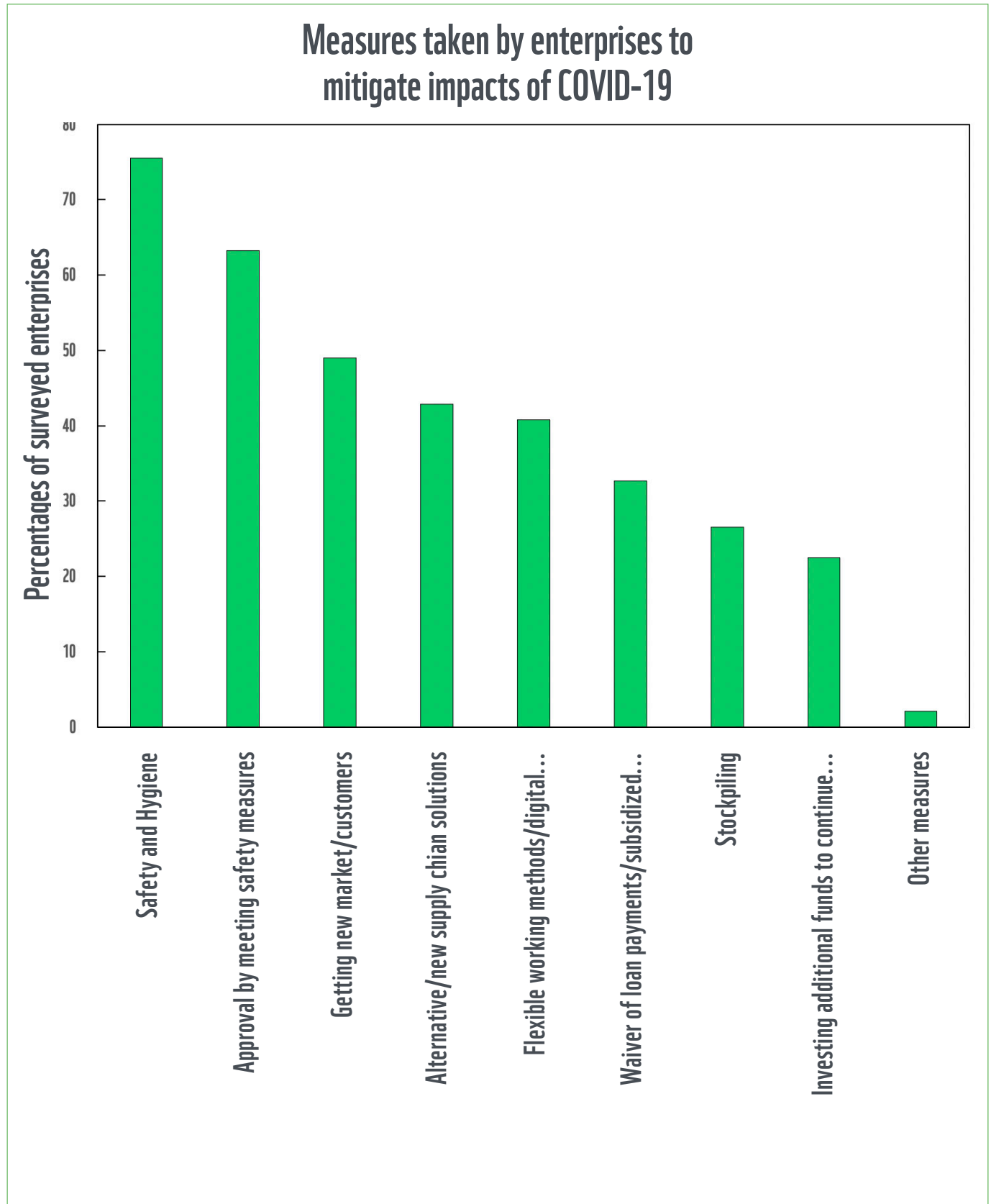


Figure 5 - What measures are you applying now to mitigate the impact of COVID-19?

External support received by the enterprises since COVID-19. A large majority of enterprises (31 enterprises, 63%) report that they have received no assistance from the Myanmar government or industry associations. (Figure 6). Out of those SMEs who received some support during the pandemic, 13 (72%) received financial subsidy. 8 respondents (44%) got some short of wavier on the interest on their loan from the bank. 3 SMEs (17%) received some support from Government/NGOs. (Figure 7)

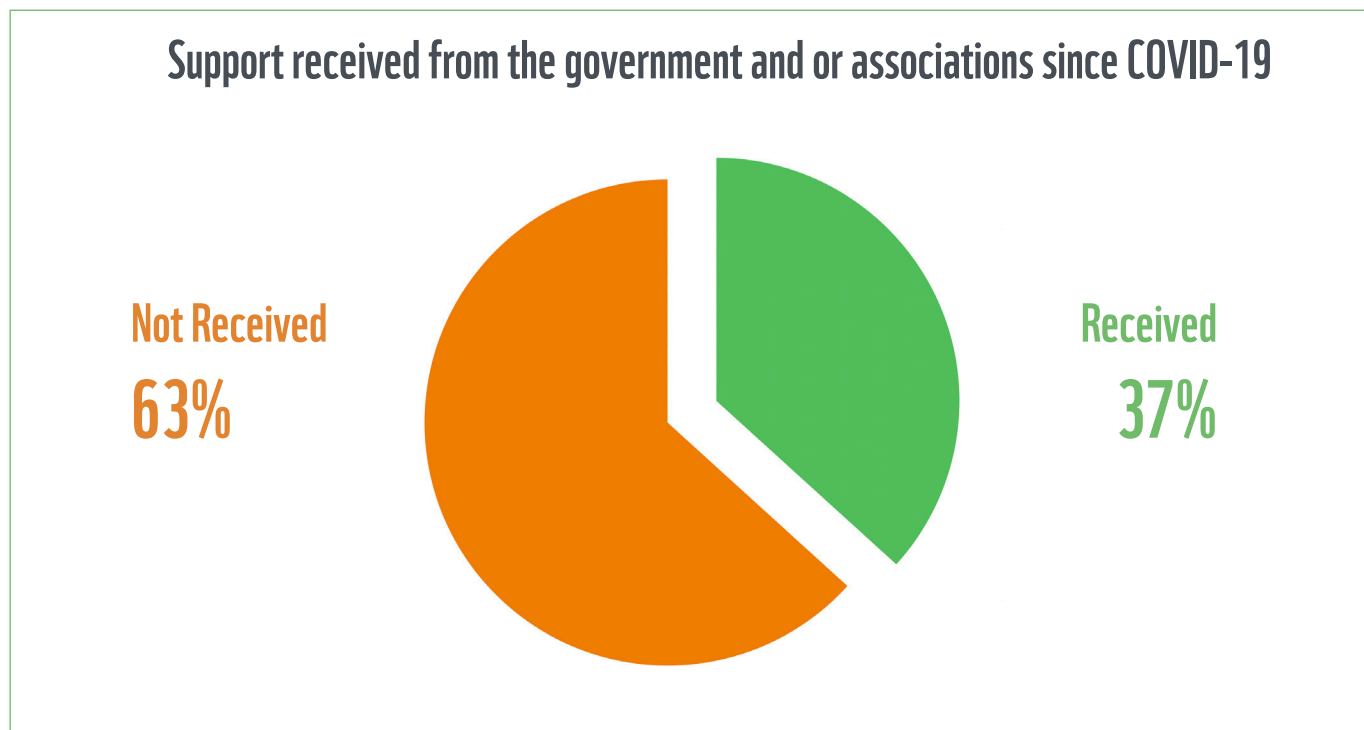


Figure 6 - Have you received support of any kind from the government and or your associations since COVID-19?

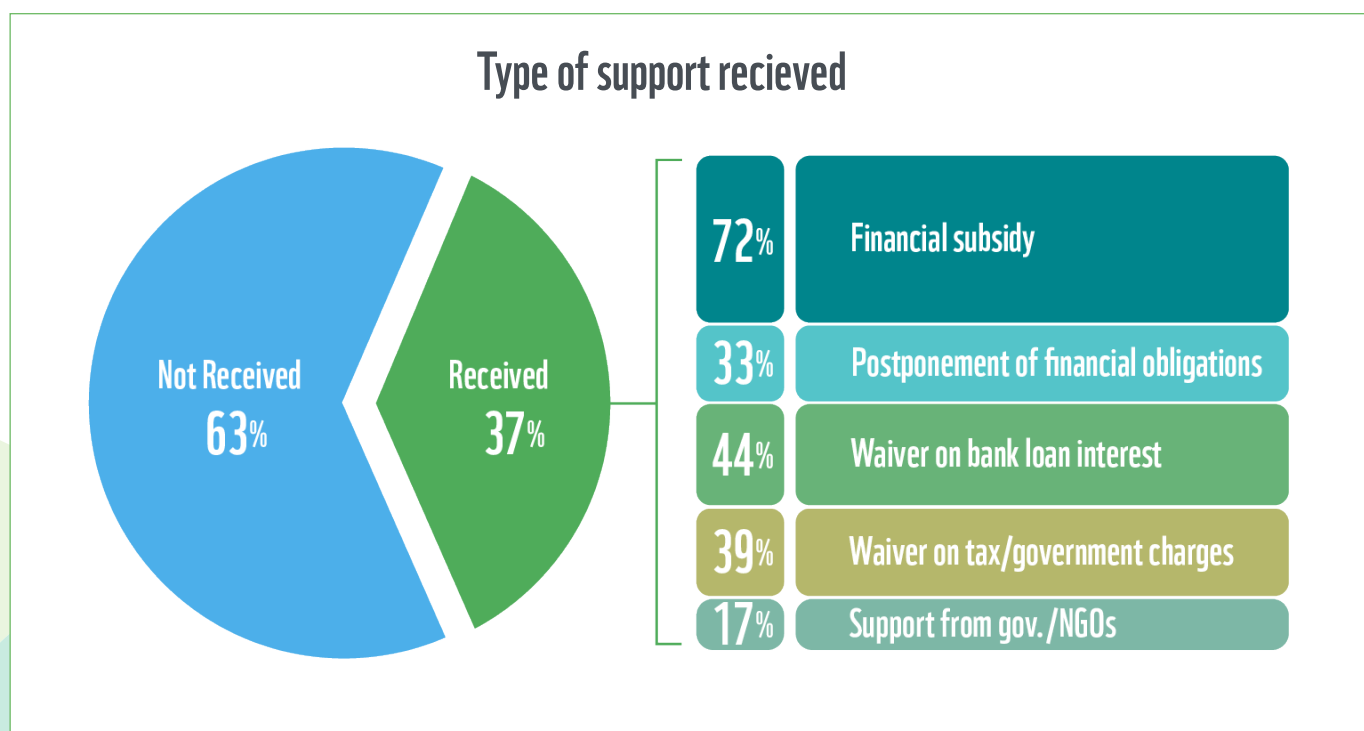


Figure 7 - If yes [support was received], what support did you receive?

Enterprises' current need. In total, 33 interviewed SMEs (67%) expressed waiver on tax / government charges as their most pressing needs. 25 respondents (51%) expressed that additional financial subsidy will assist them to cope up with the current situation. Only 15 respondents (31%) expressed that any form of advisory support via digital working methods would be beneficial.

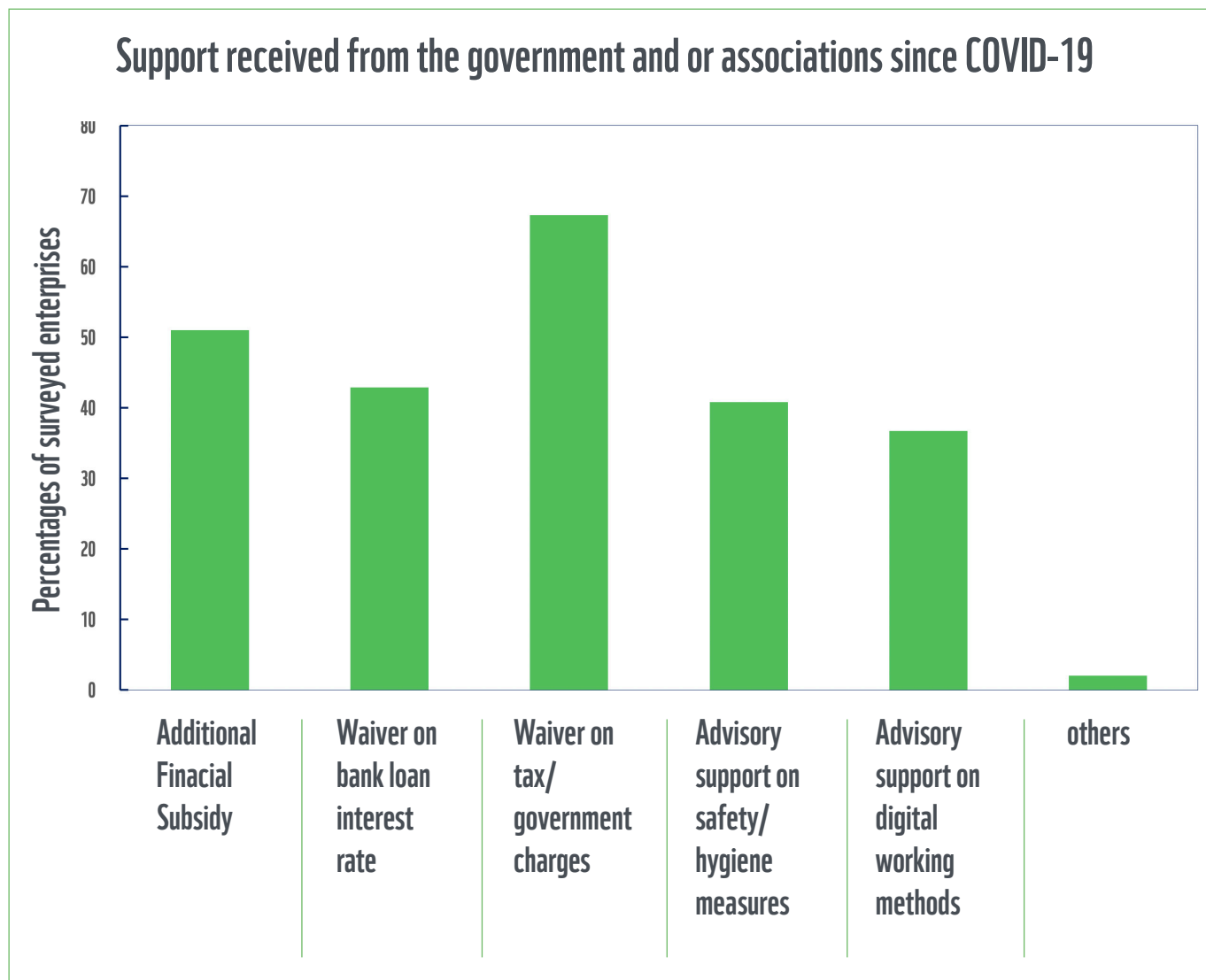



Figure 8 - What are your current needs for you during this COVID-19 situation?

Chapter 2

Moving towards greener/cleaner production during the pandemic





This chapter provides findings from the survey in relation to the following areas:

- 1 Perceived importance of cleaner/greener production practices before the COVID-19 pandemic
- 2 Influence of COVID-19 on attitude and interest in cleaner/ greener production practices
- 3 How interested enterprises wish to proceed towards cleaner/greener practices for interested enterprises
- 4 Current challenges impeding the implementation of cleaner/ green production measures
- 5 Potential support methods from Tha Bar Wa to facilitate cleaner/greener production measures
- 6 Interest in participating in Waste Water Treatment, Cleaner Production and Energy Efficiency training programs.

Chapter 2.1

Attitude and interest of enterprises towards greener/cleaner production

Perceived importance of cleaner/greener production. Of the enterprises interviewed, 47 % respondents reported having taken steps towards cleaner/greener production methods, with 14 enterprises (29 %) indicating that they had taken some steps to increase energy efficiency during production and 9 enterprises (18 %) indicating that they had begun to take steps to reduce/treat their wastewater. 21 enterprises (42 %) reported interest in implementing cleaner/greener production practices: Around half (11) of these interested respondents stated that they lack the information or technical knowledge to begin this work. A small fraction of enterprises (5 enterprises, 10 %) reported no interest in cleaner/greener production with a large majority (44 enterprises, 90%) either interested in or actively pursuing cleaner/greener production practices.

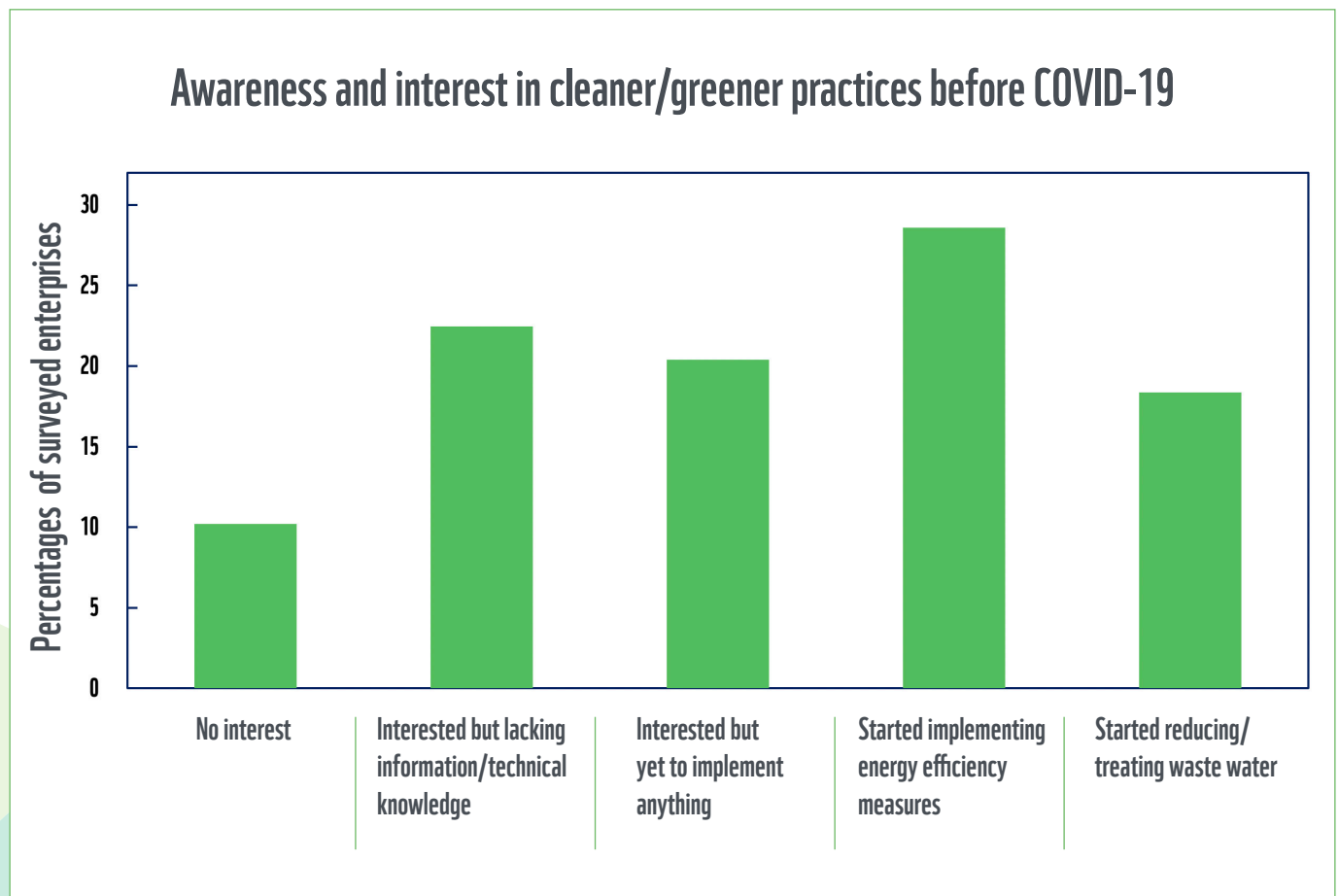


Figure 9 - How important have cleaner/greener practices been for your business before COVID-19 situation?

Influence of COVID-19 on attitude and interest in cleaner/ greener production practices. The COVID-19 situation can be seen to be slowing down the move towards cleaner/greener production practices. Whilst 13 enterprises (27 %) reported readiness to implement measures in late 2020, 43 % indicated that, while interested, they had more pressing challenges due to COVID-19 (13 enterprises, 27 %) or were postponing implementation to 2021 (8 enterprises, 16 %). Encouragingly, 8 enterprises (16 %) stated that they are now, after the COVID-19 pandemic, interested in cleaner/ greener production but do not know how to start implementation.

In total, 29 enterprises (59 %) are interested in cleaner/greener production methods but are either postponing implementation, or lack resources/knowledge required to begin implementation. This provides Tha Bar War with a significant opportunity to assist the food & beverage sector with training, capacity building activities and links to project partner banks for green loans.

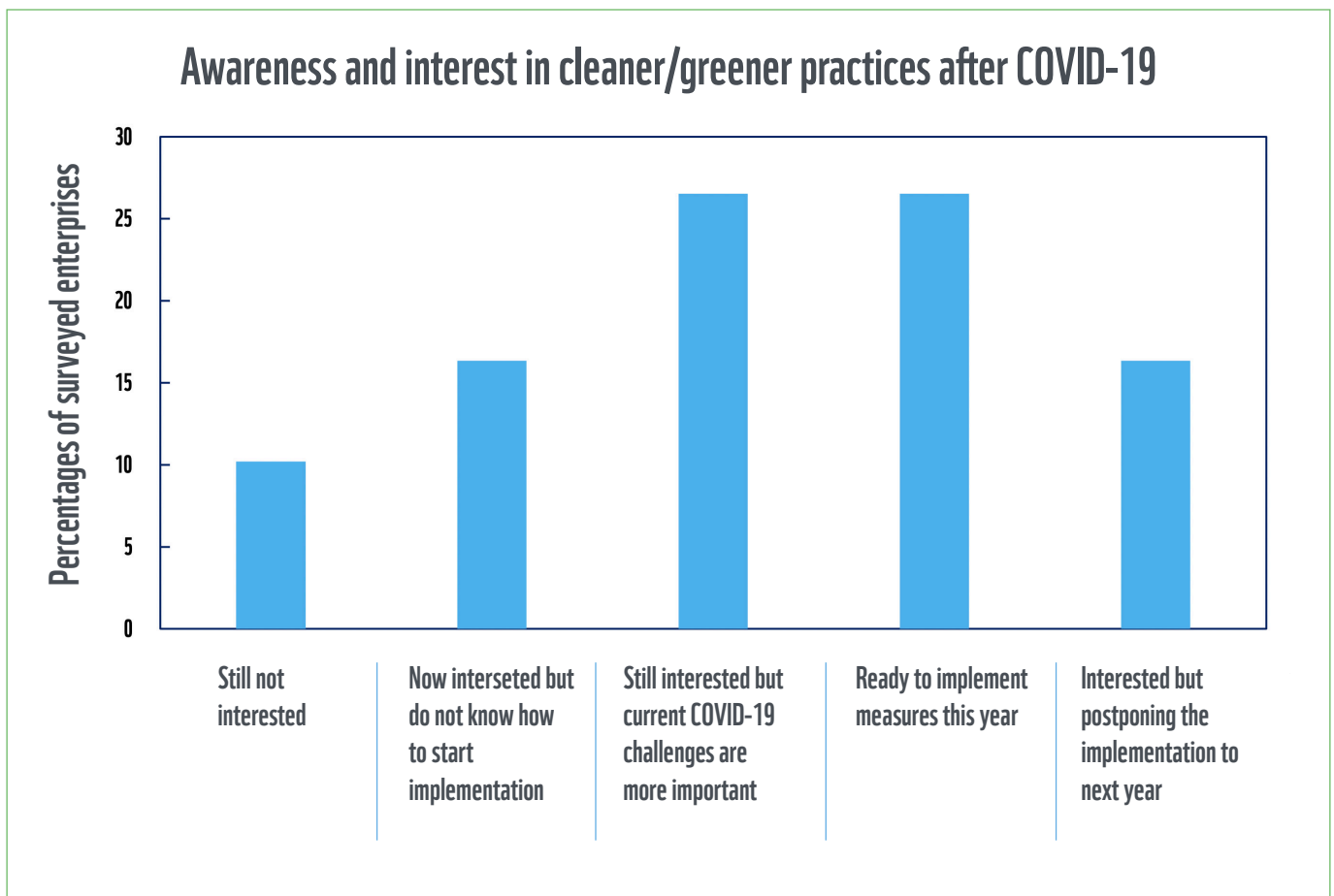


Figure 10 - How has COVID-19 influenced your attitude and interest in 'cleaner/ green production' practices?

Chapter 2.2

Assistance of Tha Bar Wa to enable cleaner/greener production

Current challenges impeding the implementation of cleaner/ green production measures. The frequent request for access to finance is reflected in the fact that “Lack of financial resources to invest” was found to be the leading challenge preventing implementation of cleaner/greener practices (27 enterprises, 55 %). Urgent problems due to COVID-19 (22 enterprises, 45 %) and lack of technical expertise/qualified staff (16 enterprises, 33 %) were also major barriers to implementation of cleaner/greener practices

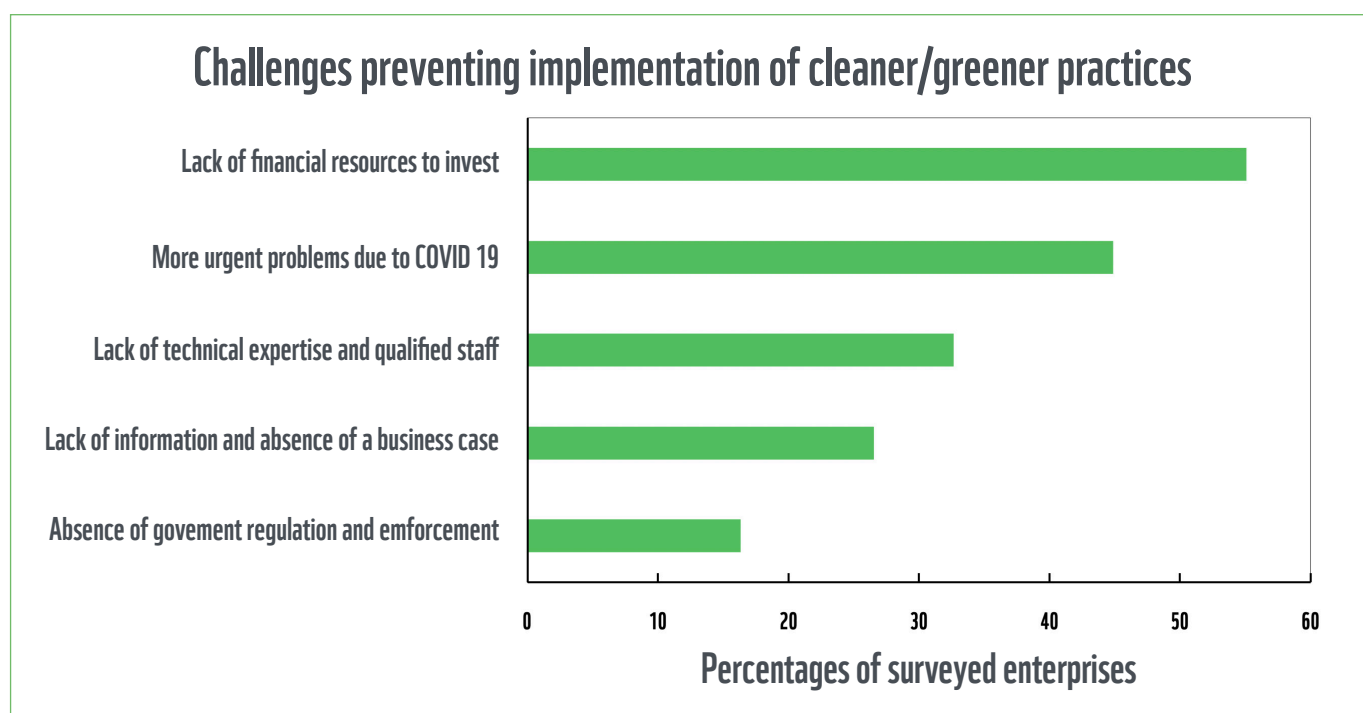


Figure 11 - What are the biggest challenges for you to implement cleaner/green production measures at the moment?

Potential support methods from Tha Bar Wa to facilitate cleaner/greener production measures. In order to shift towards cleaner/greener practices, interested enterprises' most frequent requirement is access to finance to fund implementation (20 enterprises, 41 %). Enterprises also expressed a strong requirement for technical assistance with 26 enterprises (53 %) requesting some form of expertise, discussion or guidance. Guidance required ranged from technical expertise to aid implementation (14 enterprises, 28 %) to general discussion to understand the best options available (9 enterprises, 18 %). In total, 14 enterprises (28 %) requested guidance to start energy efficiency measures with half of those enterprises also requesting guidance for wastewater management. Guidance for implementation of wastewater treatment was requested less often (9 enterprises, 18 %).

Many businesses indicated that they wish to make it through the COVID-19 crisis before focusing on cleaner/greener practices (24 enterprises, 49 %). Aside from enterprises that wish to postpone implementation, 20 enterprises (41 %) require assistance to find new customers and greater demand for their products. 12 enterprises (24 %) require help to gain access to financial resources. (Figure 13)

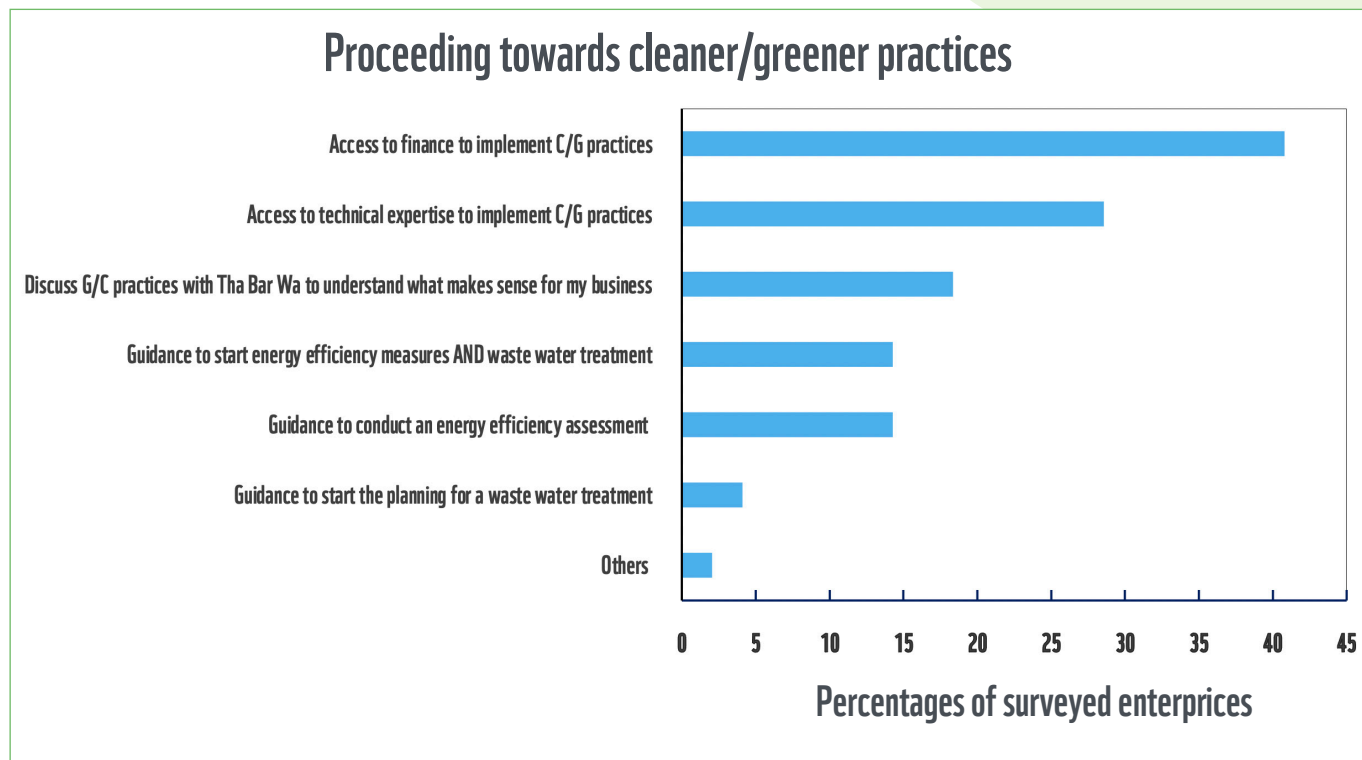


Figure 12 – [...] how would you like to proceed next?

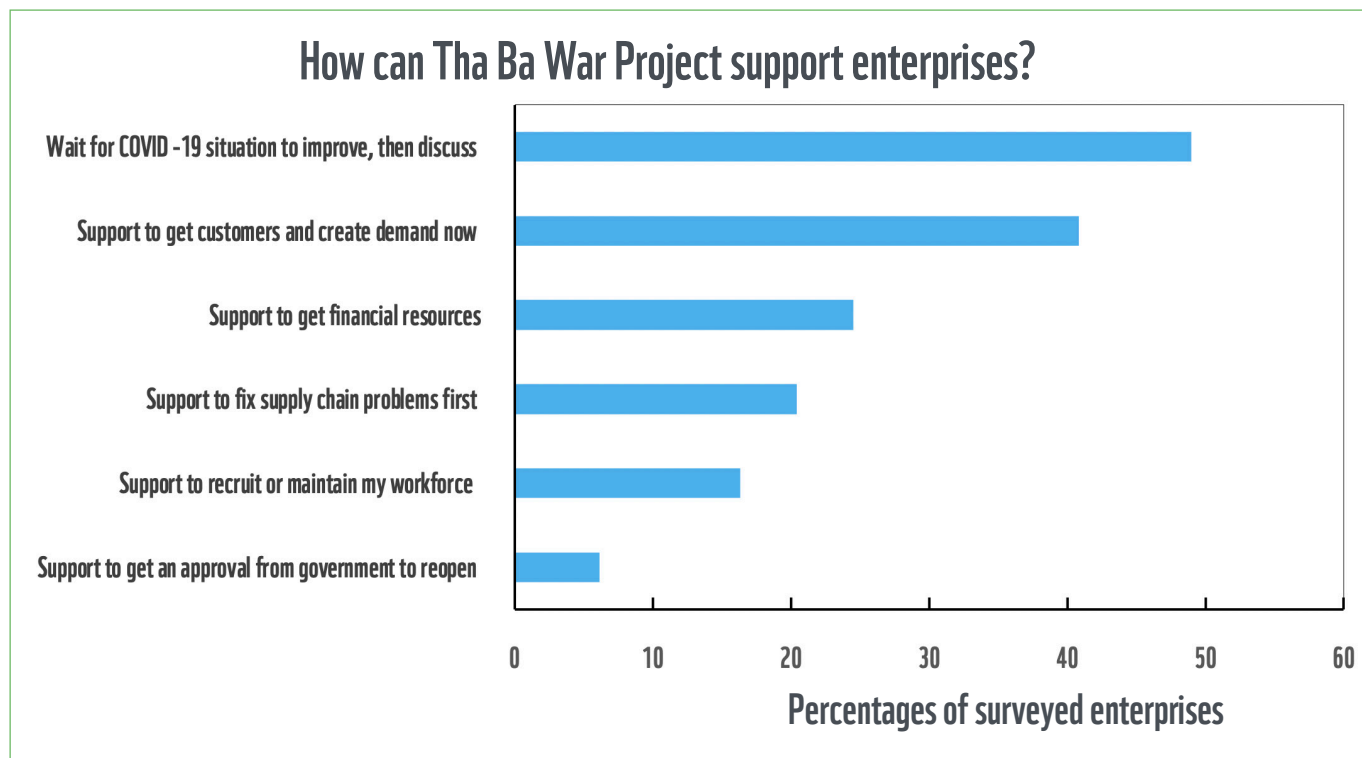


Figure 13 - How could Tha Bar Wa project support you if you are interested in implementing cleaner/ green production measures but you are currently not able to start due to COVID-19?

Interest in participating in Waste Water Treatment, Cleaner Production and Energy Efficiency training programs. A large majority of enterprises (44 enterprises, 90 %) express an interest in awareness training programmes offered by Tha Bar Wa Project (Figure 14).



Figure 14 - Are you interested in participating in the awareness training program such as Waste Water Treatment, Cleaner Production and Energy Efficiency which is organized by Tha Bar Wa Projects in future?

Conclusion and Way Forward

Overall, the results show that the SMEs in the Food and Beverage Sector are struggling under the COVID-19 pandemic situation as the majority of them only operate partially, have limited access to customers and face financial constraints. As a response to COVID-19 a significant number of enterprises invested in safety and hygiene measures for their workforce and thus, received the government approval for continuing business operations. More than half of the enterprises confirmed that waiver on tax and government charges is needed most and that additional financial assistance is required to cope with the current situation. However, almost two-thirds of the SMEs have not received any assistance from the Myanmar government or industry associations to compensate their loss. Taking that into account, it is not surprising that half of the enterprises predict lower growth rates in 2021 compared to 2020.

The results of the survey well reflect the current economic situation of the SMEs in the Food and Beverage sector which reiterates the results from other surveys and news articles in the country. This will influence Tha Bar Wa's future interventions with the enterprises. Through its network, Tha Bar Wa is able to convey the challenges and needs of the SMEs to industry associations as well as to the relevant government bodies. Regarding the financial challenges, Tha Bar Wa is willing to strongly assist in linking the SMEs with the four project partner banks to facilitate access to financial services.

Albeit the current challenging situation, nearly half of the enterprises have taken steps towards cleaner production measures such as increasing energy efficiency or reducing wastewater discharge. This clearly indicates that there is still high interest in greener production practices. Consequently, the Tha Bar Wa project will continue to provide various online training formats on energy and water management to support the interested enterprises in implementing greener solutions. In response to the large number of interested SMEs, Tha Bar Wa will provide even more (virtual) awareness raising sessions to those who are not yet familiar with the topic of cleaner production and its economic benefits.

The major reason preventing the implementation of cleaner and greener practices is the lack of financial resources to invest. The project will provide additional matchmaking events between the SMEs and the four project partner banks which have the capacity to provide financial services for green investments. This helps the enterprises to overcome the investment barrier. Many enterprises also expressed a strong need for technical assistance to implement cleaner production practices. Hence, Tha Bar Wa is confident to continue with their regular activities to support SMEs in assessing their wastewater, conducting energy audits and supporting technically in designing wastewater treatment plants – once the COVID situation permits travel and on-site visits again.

Tha Bar Wa has strong partnerships with the businesses, its association as well as the government and is therefore well positioned to facilitate the discussions on how to overcome the challenges identified in the survey and find solutions for a sustainable business development after the COVID-19 pandemic. The fast recovery of the economy is high on the agenda of Myanmar's government. Adopting cleaner production practices amongst businesses is a means to recover prosperity in a sustainable manner as reflected in the concept of a Green Recovery.

Appendix

Questionnaire:

Name of Business : _____
Location : _____
Contact Address : _____
Contact name and number : _____

1. How is your business operation as compared to pre-COVID-19? (Check one)

- (a) Fully in operation
- (b) partially in operation as compared to pre-COVID-19
- (c) still not operating

1.1 If partially operating as compared to pre-COVID-19, check one below? (Check one)

- a. 5 % - 25% capacity in operation
- b. 26% - 45% capacity in operation
- c. 46% - 60% capacity in operation
- d. 61% - 80% capacity in operation
- e. 81% - full capacity in operation
- f. 100%+ better than before COVID-19, please specify _____

2. In what ways has your business been affected by COVID-19? (Multiple checks)

- (a) Challenges in meeting government approval for reopening.
- (b) Financial challenges due to closure (lack of working capital and less profit)
- (c) Availability of workforce
- (d) Lack of supplies for my production/ operations
- (e) Lack of market (no demand)
- (f) Access to customers
- (g) Poor payment discipline from buyers
- (h) Difficulty adapting to digital communication systems and to support home working
- (i) Other challenges, please specify _____

3. What measures are you applying now to mitigate the impact of COVID-19? (Multiple checks)

- a. Putting all the safety and hygiene measures in place for my workforce
- b. New flexible working methods and digital communication systems
- c. Investing additional funds/ working capital to continue my operation
- d. Stockpiling
- e. Getting government approval and meeting all the government safety measures
- f. Getting waiver of payments for loans / getting subsidized loan from government / getting grant
- g. Looking for alternative supply chain solutions / getting new suppliers
- h. Getting new market/ customers
- i. Other measures, please specify _____

4. Have you received support of any kind from the government and or your associations since COVID-19?
- Yes,
 - No,
- 4.1 If yes, what support did you receive? (Multiple checks)
- Financial subsidy (grants/ money)
 - Postponement of financial obligations (e.g. rent, loan repayment, electricity, water bills etc.)
 - Waiver on bank loan interest
 - Waiver on tax and other government charges
 - Support from government and non-government agency (NGO/INGO/ Associations etc.)
 - others, please specify _____
5. What are your current needs for you during this COVID-19 situation? (Multiple checks)
- Additional financial subsidy (grants/ money)
 - Waiver on bank loan interest rate
 - Waiver on tax and other government charges
 - Advisory and counselling support on safety/ hygiene measures
 - Advisory and counselling support on new digital working methods
 - Others, please specify _____
6. More businesses are aware of 'cleaner/green production' practices (e.g. energy efficiency, waste reduction, wastewater treatment, pollution reduction etc.) and how that can be economically beneficial for their companies. How important has it been for your business before COVID-19 situation? (check one)
- I am not interested in it
 - I am interested but I am lacking enough information and technical knowledge
 - I am interested but I have not implemented anything
 - I have started to implement some measures on energy efficiency
 - I have started to reduce wastewater or do proper treatment of wastewater
 - Others, please specify _____
7. How has COVID-19 influenced your attitude and interest in 'cleaner/ green production' practices measures (application of energy efficiency measure and wastewater treatment plant)? (Check one)
- I am still not interested in the topic
 - I began to be interested in it but do not know how to start implementation
 - I am still interested but other challenges due to COVID-19 are currently more important to my business
 - I am interested and ready to implement sustainable production measures this year
 - I am interested but postpone the implementation of measures to next year
 - Others, please specify _____

If you check option a. in question number 7 above, kindly stop otherwise continue.

8. As you have checked that you are interested or already doing some measures in implementing cleaner/ green production measures in your company above, how would you like to proceed next? (Multiple checks)

- a. I would like to discuss the topic with Tha Bar Wa Project to learn more about it and understand what makes sense for my business
- b. I would like to implement cleaner/ green production measures but I need access to technical expertise
- c. I would like to implement cleaner/ green production measures but I need access to finance
- d. I would like to conduct an energy efficiency assessment in my business but do not know how to proceed
- e. I would like to start the planning for a wastewater treatment design for my business but do not know how to proceed
- f. I would like to start both energy efficiency measures as well as wastewater treatment plant design but do not know how to proceed
- g. Others, please specify _____

9. What are the biggest challenges for you to implement cleaner/ green production measures (energy efficiency and wastewater treatment etc.) at the moment? (Multiple checks)

- a. Lack of information and absence of a business case
- b. Lack of technical expertise and qualified staff
- c. Lack of financial resources to invest
- d. Absence of government regulation and enforcement
- e. Other problems due to COVID-19 are more important and need to be solved first
- f. Others, please specify _____

10. How could Tha Bar Wa project support you if you are interested in implementing cleaner/ green production measures but you are currently not able to start due to COVID-19? (Multiple checks)

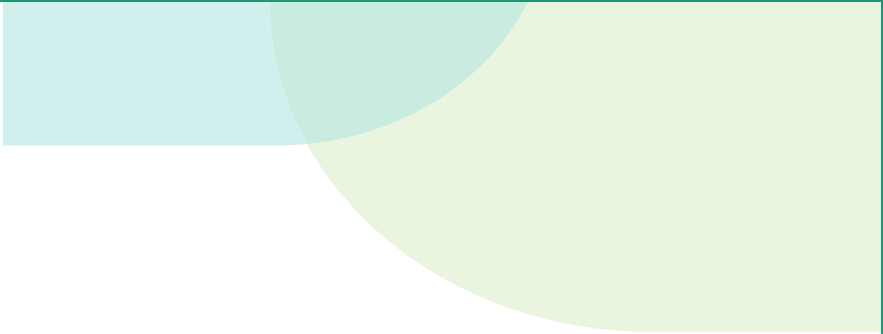
- a. I want to wait until COVID-19 situation gets better and discussed after that
- b. I need support to get financial resources
- c. I need support to get approval from the government to reopen my business
- d. I need support to fix my supply chain problems first
- e. I need support to get customers and create demand now
- f. I need support to recruit or maintain my workforce
- g. Others, please specify _____

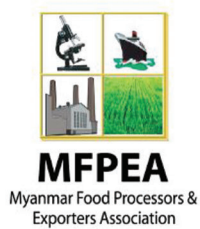
11. How do you see the prospect of growth for your business in 2021? (Check one)

- a. There is less possibility of growth due to the COVID-19 uncertainty.
- b. In 2021, I expect to grow my business more
- c. The growth of my business will be the same as this year
- d. Other please specify _____

12. Are you interested in participating in the awareness training program such as Waste Water Treatment, Cleaner Production and Energy Efficiency which is organized by Tha Bar Wa Projects in future?

- a. Yes b No





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