Nature, People and Rubber

Securing a sustainable future of rubber production

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Development vision: A prosperous nation integrated into the global community (2030)

- National Comprehensive Development Plan

Government of Myanmar
From small beginnings in 2014 our work has grown to
This is Dawna Tenasserim Landscape

- Over 10 million hectare, the largest high conservation forest ecosystem in SE Asia
- Provides range of ecosystem services: freshwater, flood control, pollination to millions of people
Home to diverse ethnic groups

- Karen, Hmong, Lisu and Mon the most dominant groups
- High cultural values and traditions
Biodiversity hotspot

- The last remaining place in SE Asia where tigers’ population can increase
- Intact ecosystem and biodiversity
Rubber driving deforestation

- Rubber poses one of the biggest threats to our forests in DTL
- Over 100,000 hectare of High conservation forest has been lost to rubber since 2000 in Tanintharyi alone
Rubber farmers livelihoods distressed

- Aung kyaw family works at a 4 hectare plantation in DTL
- Monoculture, low market access, no GAP (Good Agricultural Practice), no access to loans, no collectivisation, no bargaining power
Low quality and value addition

- Family supports in making USS (Unsmoked Sheet) from latex
- Children have dropped out of school
Increased dependency on NTFP

- Farmers extract more NTFP when livelihoods not met

When rubber prices are low, farmers extract more NTFP from the forest

Wildlife sold to neighboring countries
Easier access for professional poachers

- Economic activities in and near forest makes poaching easier
Rubber production has increased dramatically

But yield, quality and market access remain weak

<table>
<thead>
<tr>
<th>Year</th>
<th>Planted Area (Ha.)</th>
<th>Productive Area (Ha.)</th>
<th>Yield (Kg /Ha.)</th>
<th>Production (metric tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005-2006</td>
<td>226,043</td>
<td>108,124</td>
<td>594</td>
<td>64,238</td>
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<td>2006-2007</td>
<td>294,745</td>
<td>122,987</td>
<td>596</td>
<td>73,355</td>
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<td>2007-2008</td>
<td>378,705</td>
<td>138,779</td>
<td>633</td>
<td>88,528</td>
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<td>2008-2009</td>
<td>427,913</td>
<td>144,245</td>
<td>647</td>
<td>93,207</td>
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<td>2009-2010</td>
<td>462,729</td>
<td>166,604</td>
<td>670</td>
<td>111,673</td>
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<td>2010-2011</td>
<td>504,454</td>
<td>186,466</td>
<td>686</td>
<td>127,921</td>
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<td>2011-2012</td>
<td>543,170</td>
<td>198,357</td>
<td>754</td>
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<td>2012-2013</td>
<td>581,101</td>
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<td>2013-2014</td>
<td>609,808</td>
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<td>2014-2015</td>
<td>641,069</td>
<td>258,789</td>
<td>766</td>
<td>198,022</td>
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<td>2015-2016</td>
<td>650,504</td>
<td>280,966</td>
<td>754</td>
<td>212,089</td>
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</table>

Majority of rubber is immature. It underscores recent scale of expansion and deforestation.

One of lowest yields (and quality) in the world.

Total production expect to increase 2-3 folds.
Rubber sustainability issues and impact on supply chain

- Limited access to Market
- Impact on Forest
- Limited GAP knowledge
- Limited access to loans
- Limited collectivisation

Unsustainable Rubber Production

Supply chain risk

Sustainability Risk
Solution: Decouple rubber production from deforestation

• Reduce horizontal expansion and improve productivity

• Sustainable rubber production
  • Zero Deforestation
  • Zero human and labour rights violation
  • Zero land grab and FPIC
  • Traceability and transparency
Rubber agroforestry

By 2020, communities in and around DTL to produce rubber sustainably
Rubber agroforestry

- Technical Capacity of the system – agricultural extension, farmers cooperatives, research institutions – on rubber agroforestry
- Greater collectivization and value addition by communities
- Communities’ Commitment to Zero deforestation and zero poaching
- Demand from International buyer to source sustainable rubber

Progress:
- Tapping training: 20% increase in yield
- CSO and community consultation

Dr. Buncha, Expert from Price of Songkla University, explaining rubber agroforestry to Ministry of Agriculture of Myanmar
Land use planning and land governance by local community

No concession in HCVF, HCS and Key Biodiversity Areas (KBA)

Value addition, collectivization, finance and climate resilience

**Progress:**

- Draft rubber law requires zero deforestation
- Study tour to Thailand

Ministry of Agriculture commits to Zero Deforestation (16 Nov 2016)
Why international companies should source sustainable rubber from Myanmar

• Opportunity to demonstrate a “best practice” for sustainable rubber supply chain

• Strong political will to promote sustainable rubber

• Yield improvement and access to market would incentivize communities to protect forests

• Emerging market for rubber production

• Agreement with communities, government and other stakeholders to produce rubber sustainably
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