

The Republic of the Union of Myanmar

2014 Myanmar Population and Housing Census

Policy Brief on Housing Conditions and Household Amenities



**Department of Population
Ministry of Labour, Immigration and Population
With technical assistance from UNFPA**

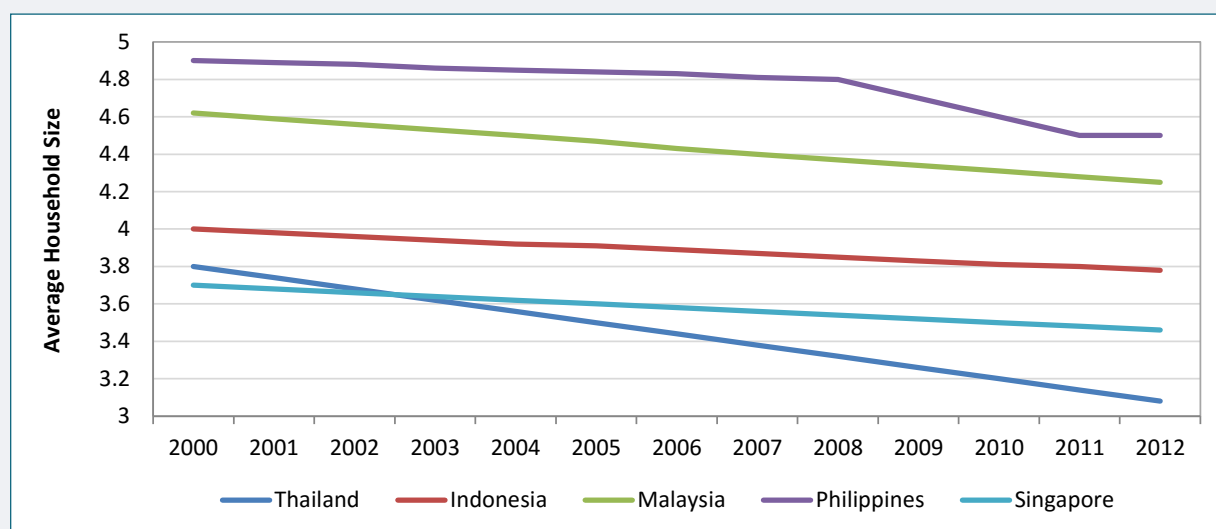




Key points

- (1) From 1983 to 2014, the number of households in Myanmar grew from 6.5 million to 10.9 million. The average household size fell from 5.2 persons per household to 4.4 persons per household.
- (2) According to the 2014 Census, about 85.5 per cent of households were owners of the dwelling units they lived in. In rural areas, this share reached 93.1 per cent, while in urban areas the ownership rate stood at 66 per cent of households. The high level of ownership incorporates an outstanding potential for the future development of the housing sector: through the provision of secure land titles serving as collateral for loans and through secure property rights, a significant amount of investment can be mobilized for modernizing and expanding the national housing stock.
- (3) The aggregate physical quality of housing leaves room for improvement. Close to 80 per cent of all households lived in wooden houses or bamboo houses. Only 11.3 per cent of all households were residing in dwelling units constructed with concrete, bricks or tiles. The limited quality of large portions of housing stock requires immediate policy action with a view to developing large-scale maintenance and repair capacities. The establishment of large-scale financial intermediaries, both private and public for housing loans, is urgently required. Loans must be made available for both new construction and, in particular, for maintenance and repair.
- (4) Only 69.5 per cent of all households have access to improved sources of drinking water. Differences between rural areas and urban areas were large. In urban areas, improved sources were available to 86.7 per cent of households, while just 62.7 per cent of rural households had access to improved sources of drinking water. The level of supply through improved sources apparently stands significantly below the aggregate level reached in South-East Asia as a region, where 90 per cent of all households had access to improved sources of drinking water in 2015. Nationwide, about three quarters (74.3 per cent) of all households had access to improved sanitation, which appears to be in line with regional levels. In urban areas at 92.3 per cent, the proportion of households enjoying improved sanitation is significantly higher than in rural areas at 67.3 per cent, where in part the quality of sanitation is exceptionally poor. Large-scale nationwide tackling of sanitation issues is of particular importance for generating adequate and safe public health conditions.
- (5) About 32 per cent of households used electricity for lighting. Discrepancies between urban areas and rural areas were notably strong. In rural areas, only about 15 per cent of all households had access to electricity, whereas in urban areas this share stood substantially higher at 77.5 per cent. Infrastructural supply gaps between urban areas and rural areas are generally wide. In particular, this holds true for electricity supply. Hence, accelerating and expanding rural electrification needs to become a top policy priority.
- (6) The 2014 Census identified five levels of housing quality: excellent, good, somewhat deficient, requiring some repairs or modifications, deficient, and extremely deficient. The Census found that only 10.9 per cent of all households were residing in top-level dwelling units, whereas 26.3 per cent of all households (about 2.86 million) were living in units of deficient or extremely deficient quality.
- (7) From the 2014 Census data a core housing need of 3.8 million units was derived. This figure indicates that Myanmar's housing sector faces daunting challenges, requiring simultaneous and sustained long-term remedial policy action in various interconnected areas.
- (8) Coverage of the topics in the 2014 Census was only in part compliant with the United Nations recommendations. Of the United Nations 22 core topics, just 11 were included in the 2014 Census. In particular, central parameters such as the number of dwelling units and the number of rooms in a housing unit were not covered. Therefore, an urgent need arises to conduct either a comprehensive housing survey as soon as possible or to include a complete set of housing questions in the mid-term censal survey. Without better data, evidence-based policymaking can hardly be pursued.

Figure 1: Trends in average household size in selected countries in South-East Asian Region, 2000-2012



A. Housing Conditions

a. Households

Conventional households play a central role in the housing sector, because they represent the fundamental demand generating actor in the housing sector. The 2014 Census enumerated a total population of 51,486,000 persons, of which 47,930,000 lived in conventional households, while 2,350,000 lived in institutions. 974,000 individuals were estimated to be homeless persons/persons in other collective quarters. From 1983 until 2014 the number of households grew from 6,496,000 to 10,878,000, a total increase of 67.5 per cent. The average annual growth rate of households reached 1.7 per cent, while population growth was substantially lower at 1.2 per cent. The considerably higher growth rate of households indicates strong and persistent housing needs.

Between 1983 and 2014 the average size of households fell from about 5.2 persons to 4.4 persons per household. While this is higher than in most other countries in South-East Asia (with the exception of the Philippines), Myanmar nonetheless participates in the general trend of decreasing mean household sizes observed in neighbouring countries.

Worldwide, significant differences in household sizes between urban areas and rural areas are a typical feature. In both industrialized and less developed countries, households in urban areas tend to be smaller than households in rural areas. Yet in Myanmar, the mean number of persons per household in urban areas is slightly higher than in rural areas: 4.5 persons vs. 4.4 persons. Causes for this difference remain unclear.

b. Tenure Conditions

The two main types of household tenure are “owner occupied”, where the head and/or any other member(s) in the household own the dwelling unit and “renting”, where the head and/or any other member(s) in the household rent the dwelling unit. As further tenure categories, the 2014 Census included “provided free”, “government quarters”, “private

company quarters”, and “other”.

The 2014 Census found that at the Union level 85.5 per cent of all households were owners, while just 7.4 per cent were renters. In urban areas, the share of renting households was much higher than the national average and stood at 20.3 per cent. Yet the portion of household owners still reached an overwhelming majority of 66 per cent. Furthermore, 7 per cent of all households in urban areas lived in government quarters, whereas in rural areas this category was nearly insignificant at 1.8 per cent. In rural areas, ownership overwhelmingly prevails, with 93.1 per cent of all households being owners.

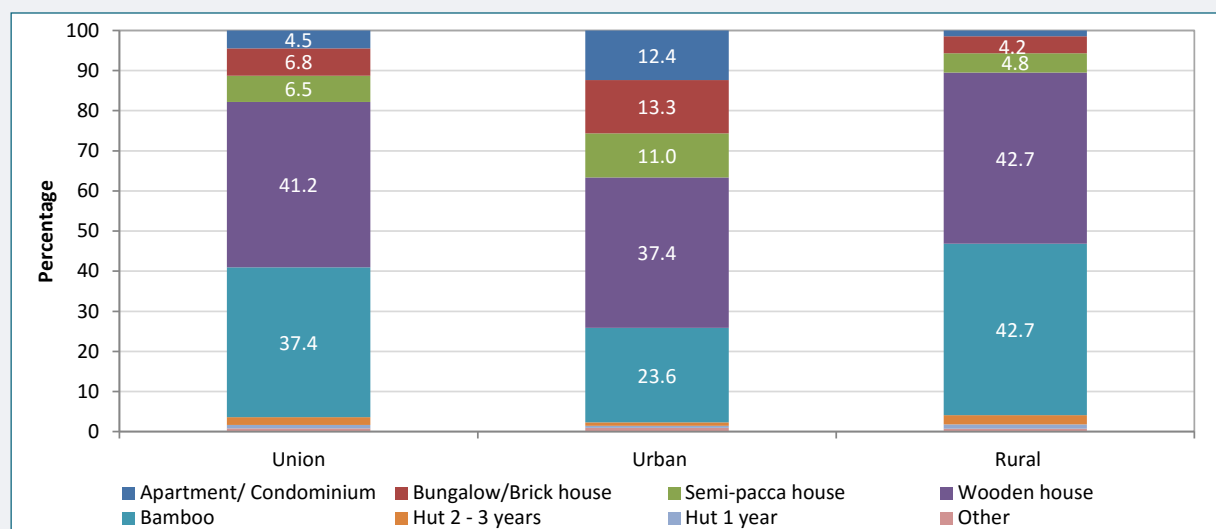
Among states and regions, Ayeyawady Region recorded the highest ownership rate at 93.8 per cent of households, whereas Yangon Region registered the highest share of renting households at 24.5 per cent. Not surprisingly, the tenure category “government quarters” peaked in Nay Pyi Taw at 14.4 per cent of households.

c. Types of Housing Units

The 2014 Census recorded information on the types of dwelling units. The physical features of dwelling units indicate one of the central aspects of Myanmar’s housing sector: the high share of dwelling units constructed – at least in part – with plant-based (organic) material, including wood. Here in particular, the structural predominance of the country’s rural areas makes itself felt. This points towards an extraordinary need for the future modernization of housing stock. It needs to be noted, though, that the usage of plant-based construction material – in particular, wood – does not imply any judgement on the durability of the building. Providing investments in maintenance and repairs are made at regular intervals, even buildings made entirely from plant-based material can be used for many years.

Most households live in wooden houses (41.2 per cent) or bamboo houses (37.4 per cent), yielding a combined total of close to 80 per cent. Just 11.3 per cent of all households live in units which are constructed with bricks and concrete, such as

Figure 2: Percentage of households by type of housing unit, urban and rural areas, 2014 Census



apartments, condominiums, and flats. In urban areas, the share of households living in units built with bricks or concrete stood at around 25.7 per cent, while, conversely, the share of wooden houses and bamboo houses fell to 61 per cent. Figure 2 depicts this.

d. Building Materials

The 2014 Census collected information on building materials used for exterior walls, roofs, and floors.

Walls

More than one third of all households (37.5 per cent) were living in dwelling units with exterior walls made of permanent materials (tile/concrete/brick/wood). Conversely, 61.3 per cent were living in dwelling units whose walls were made of semi-permanent (bamboo/corrugated iron sheet/earth) or temporary materials (dhani/theke/in leaf). In urban areas, a slight majority of 56.4 per cent of all households were living in dwellings with exterior walls made of permanent materials. Yet the share of about 43 per cent of urban households still living in units with exterior walls made of semi-permanent or temporary materials appears to be rather high, indicating a substantial need for modernization even in urban areas.

Roofs

Due to Myanmar's climate conditions, the quality of the construction material used for roofing is of outstanding importance. For almost two-thirds of all households (63.6 per cent), the 2014 Census recorded roofs made from permanent materials (tile/brick/concrete/corrugated iron sheet). Conversely, categories "semi-permanent" (wood/bamboo), "temporary" (dhani/theke/in leaf) and "other" applied to 36.4 per cent of households. The characteristic disparities between urban areas and rural areas appeared as well: while in rural areas 55 per cent of all households were residing in housing units with a roof constructed with permanent material, in urban areas almost 86 per cent of households were living in dwelling units with a roof built with permanent material.

Floors

Components in dwelling units that are easiest to improve are floors. Findings of the 2014 Census reflect this. Nationwide, two-thirds of all households were living in dwelling units with floors made of permanent materials (tile/brick/concrete or wood). In urban areas, the share of households with floors built with permanent material already reached 82 per cent, while in rural areas this share reached 60 per cent. The share of rural households living in dwelling units with floors made from bamboo or earth stood at 39.2 per cent, indicating substantial room for improvement. The distribution of features of durability manifest a rather significant gap between building quality in urban and rural areas.

B. Household Amenities

Water supply, safe sanitation, and power supply are of fundamental importance for all households' quality of life. All dwelling units including informal ones and those located in squatters' areas should be able to enjoy basic minimum living and health standards. Through the 2014 Census basic facts concerning infrastructural facilities and services at the level of individual households have been made available on a nationwide level.

e. Water supply and sanitation

Water supply

The quality and safety of drinking water is determined through its source. Sources considered to be safe were grouped together as "improved drinking water" - (piped) tap water, tube wells (boreholes), protected wells/springs, and bottled (purified) water. Unimproved water sources for households were unprotected wells/springs, pools/ponds/lakes, rivers/streams/canals, waterfall/rainwater, tankers/trucks and others. The Census found that 69.5 per cent of all households received drinking water from improved sources, while 30.5 per cent of all households did not. Significant discrepancies between urban and rural areas emerge again, as figure 3 illustrates.

Figure 3: Percentage of households with or without access to improved drinking water, urban and rural areas, 2014 Census

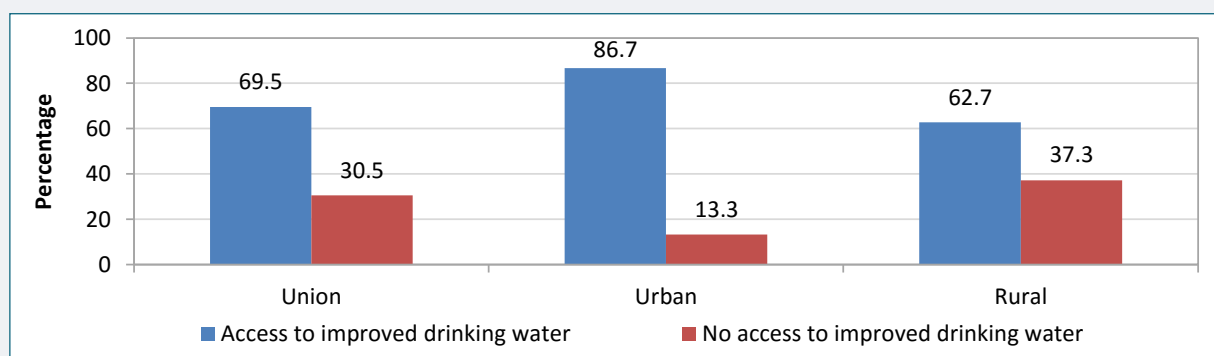
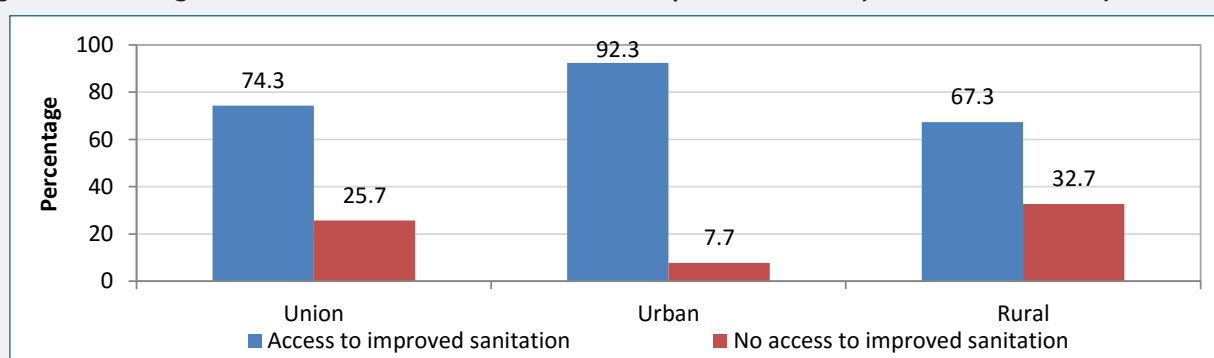


Figure 4: Percentage of households with or without access to improved sanitation, urban and rural areas, 2014 Census



Sanitation

In parallel fashion, facilities for sanitation were classified as “improved” or “unimproved”, depending on the type of toilet. The category “improved” implies safe domestic sanitation and includes flush toilets and water seal toilets (improved pit latrines), while the category “unimproved” encompasses traditional pit latrines, surface latrines (buckets), no toilet at all (none) and others. Figure 4 depicts respective percentages at the Union level and for urban and rural areas.

The 2014 Census found that nationwide 74.3 per cent of households had access to improved sanitation. A further urban-rural discrepancy comes into view: 92.3 per cent of all urban households reported access to improved sanitation, whereas in rural areas this was the case for just 67.3 per cent of households. While these figures appear to be quite in line with neighbouring countries, it needs to be noted that 14.4 per cent of all households (urban: 2.6 per cent; rural: 19.0 per cent) reported not to have access to any toilet at all. Since this issue affects about one fifth of all rural households, findings of the 2014 Census undoubtedly reflect a serious public health issue.

f. Energy sources for households

For households' cooking, it was found that nationwide just 16.4 per cent of households used electricity, while an overwhelming majority of 81.4 per cent of all households had to resort to firewood (69.2 per cent) and charcoal (11.8 per cent). Variance between urban areas and rural areas was firmly pronounced. In urban areas, 44 per cent of households used electricity as

a source of energy. Yet in rural areas this share fell to a meagre 5.6 per cent, with 86.2 per cent of all households relying on firewood and another 6.1 per cent on charcoal.

2014 Census data reveal that just 32 per cent of all households have access to electricity from the power grid that is used as the main source of lighting in dwelling units. Almost 21 per cent of all households have to rely on candles, while approximately 17 per cent use batteries. Additional important sources are private generators (9.3 per cent), solar energy (8.7 per cent), and kerosene (8.1 per cent). In rural areas, candles and batteries are the most important types of energy for lighting for 26 per cent and 21.1 per cent of all households respectively. With regards to access to the power grid, gaps between urban and rural areas are exceptionally wide. Nationwide, 77.5 per cent of all households located in urban areas have access to the power grid, while this is the case for only about 15 per cent of all rural households. Census data suggest that the degree of rural electrification is clearly deficient.

g. Housing Quality

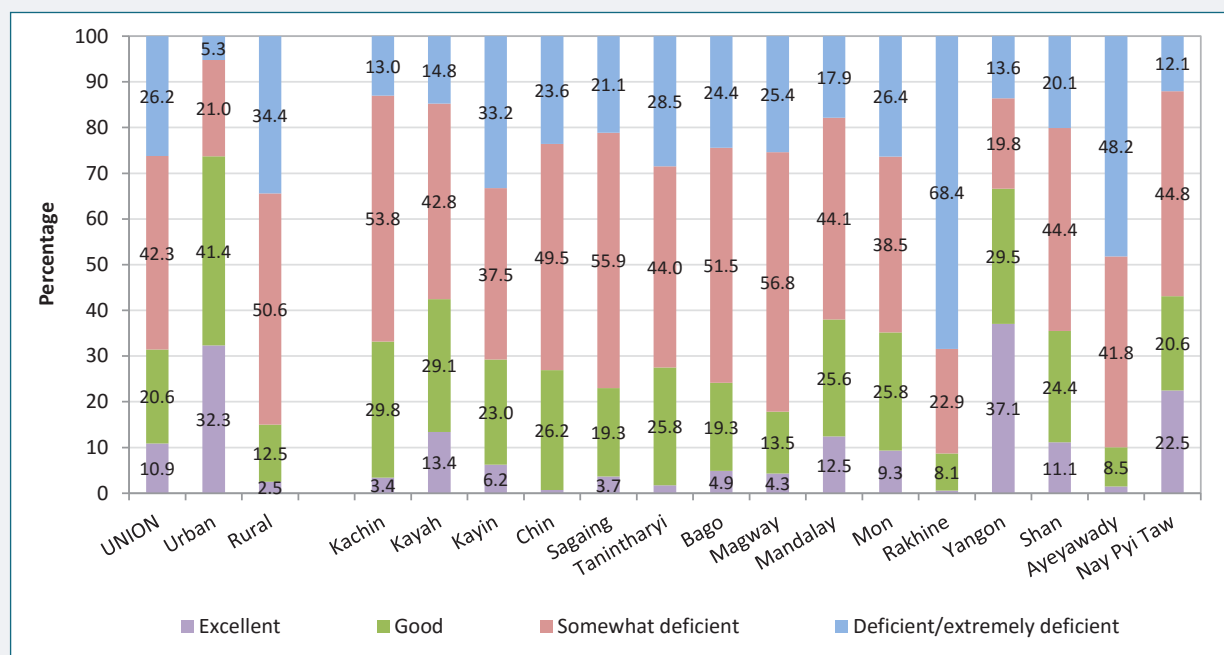
Housing quality is shown in the overview below.

Excellent	Good	Somewhat deficient	Deficient	Extremely deficient
1,181,079*	2,239,569*	4,602,285*	2,682,685*	172,214*
10.9%	20.6%	42.3%	26.2%**	

*Number of households.

**Figure comprises percentage of deficient and extremely deficient units.

Figure 5: Percentage of households by level of housing quality, urban and rural areas, State/Region, 2014 Census



At 42.3 per cent of all households, the category “somewhat deficient” had the highest share of all households in Myanmar, encompassing 4.6 million households. Across the country, more than a quarter of all households inhabited inadequate units, while only 10.9 per cent enjoyed the top-level housing quality. About 2.24 million households lived in dwelling units of good quality. In urban areas 32.3 per cent of households resided in dwelling units belonging to the category “excellent” and 41.4 per cent in housing units of good quality. In sum, almost three out of four households in urban areas inhabited adequate units. This outcome is shaped by the enormous relative weight of Yangon. In contrast, particularly poor are outcomes in Rakhine State and Ayeyawady Region. In Rakhine State, 68.4 per cent of all households were living in deficient or extremely deficient dwelling units, while in Ayeyawady Region 48.2 per cent of all households suffered from inadequate homes.

Housing quality and tenure

Among tenure categories, an interesting picture emerges with regard to housing quality. In the category “Government quarters” about 60 per cent of households were residing in top-level units, while approximately one third were accommodated in good quality units. Hence, the overwhelming majority of households living in dwelling units provided by Government enjoyed adequate housing quality. A somewhat similar picture becomes apparent in the category “renter”, in which about 70 per cent of households had adequate accommodation. Close to 30 per cent were lodging in top-ranked dwelling units, and another 40 per cent inhabited dwelling units ranked as good. Among owner occupied

households, at 28.9 per cent the share of households living in housing units of the lowest quality is alarmingly high, while, conversely, just 7.2 per cent of owner occupied households possess dwelling units in the top-rank. Less than a fifth of owners had dwelling units of good quality. Since across the country 9,303,000 households own their housing unit, 2,685,000 households are affected by deficient quality of housing. Certainly, the preponderance of rural households impacts significantly here. In sum, the situation appears to be quite grave, requiring swift remedial policy action.

C. Housing requirements

As a consequence of the specific design of the 2014 Census, the scope for analysis is limited. It is, however, possible to estimate current unmet adequate housing needs.

The rounded number of households whose dwelling unit is considered to be deficient or extremely deficient is 2,855,000. A separate institution questionnaire found that of the total population counted, about 974,000 persons were identified as “homeless or persons in other collective quarters”. This figure was used as an approximate proxy to estimate the overall number of homeless. In sum, this adds up to an unmet current adequate housing need of about 3,828,000 housing units. This number encompasses the number of housing units required to eradicate homelessness and the number of deficient units which need to be modernized or replaced by newly built adequate units.

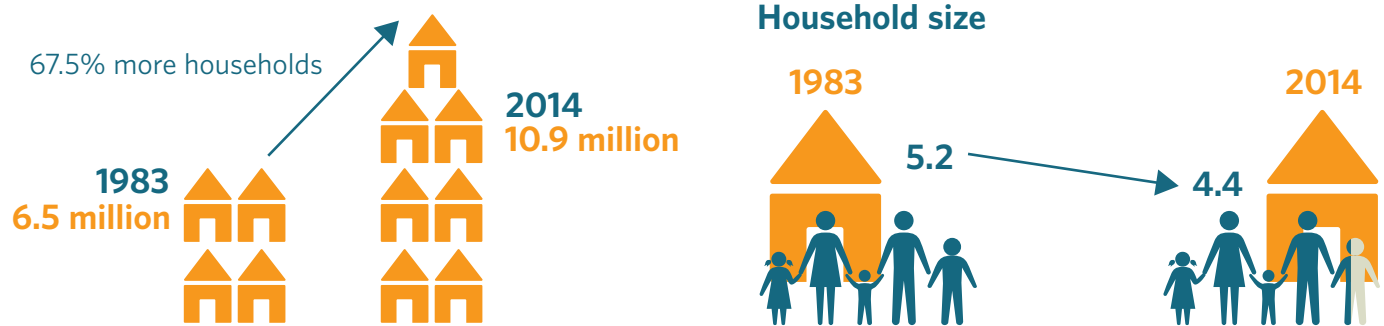
Note: The analysis in this policy brief does not cover the non-enumerated populations. Some populations in three areas of the country were not enumerated. This included an estimate of 1,090,000 persons residing in Rakhine State, 69,800 persons living in Kayin State and 46,600 persons living in Kachin State (see Department of Population, 2015, for the reasons that these populations were not enumerated). In total, therefore, it is estimated that 1,206,400 persons were not enumerated in the Census.



The Republic of the Union of Myanmar

POLICY BRIEF ON HOUSING CONDITIONS AND HOUSEHOLD AMENITIES

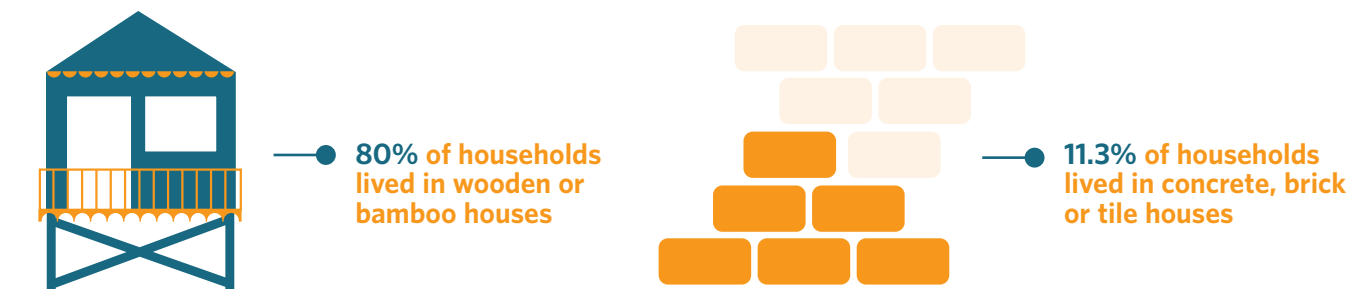
HOUSEHOLDS



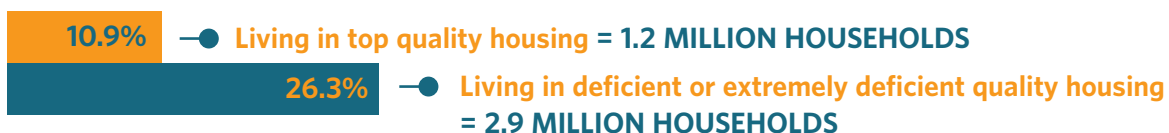
HOUSE OWNERSHIP



TYPES OF HOUSING UNITS



HOUSING NEED



- ▶ Almost **1 MILLION people** were estimated to be homeless or persons in other collective quarters
- ▶ **CORE ADEQUATE HOUSING NEED = 3.8 MILLION UNITS** to eradicate homelessness and housing that needs to be modernized or replaced by adequate units

HOUSEHOLD AMENITIES



- 31% had **NO ACCESS** to safe drinking water compared to 10% had **NO ACCESS** in South-East Asia



URBAN 13%



RURAL 38%



- 26% had **NO ACCESS** to improved sanitation

URBAN 8%



RURAL 33%



- 68% had **NO ACCESS** to electricity from the grid

URBAN 22%



RURAL 85%



- 21% rely on candles



- 17% rely on batteries

POLICY OPTIONS



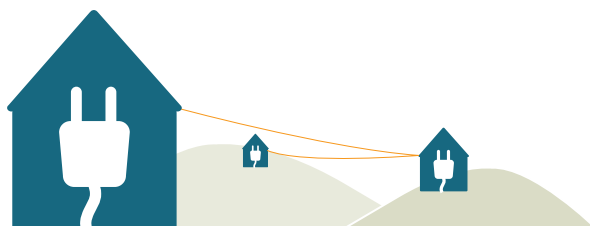
- Provide secure land titles as collateral for loans to further **mobilize investment** for the national housing stock

- Establish **large scale financial intermediaries** for housing loans



- Develop **large scale maintenance and repair** capacities

- Generate **adequate and safe public health conditions** through addressing sanitation issues nationwide



- Accelerate and expand **rural electrification**



- Carry out a **comprehensive housing survey** to generate better data for evidence-based policy making

Note: The analysis in this policy brief does not cover the non-enumerated populations. Some populations in three areas of the country were not enumerated. This included an estimate of 1,090,000 persons residing in Rakhine State, 69,800 persons living in Kayin State and 46,600 persons living in Kachin State (see Department of Population, 2015, for the reasons that these populations were not enumerated). In total, therefore, it is estimated that 1,206,400 persons were not enumerated in the Census.

