

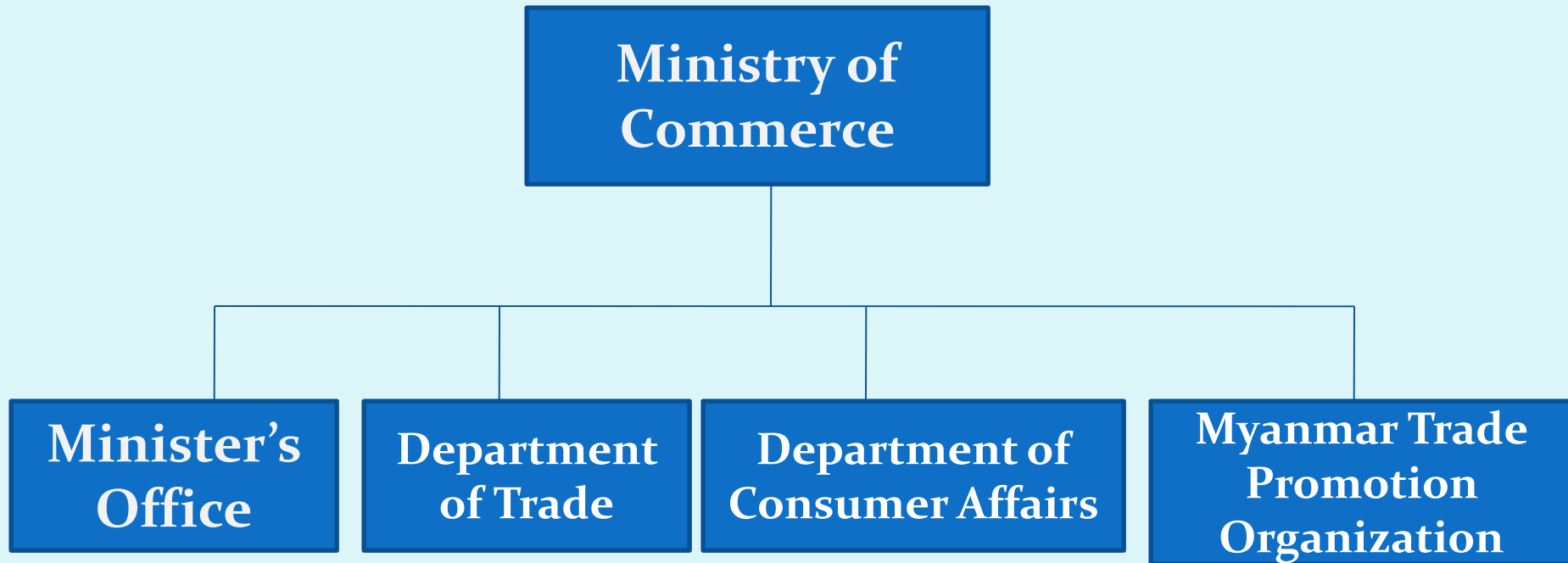
# Export Strategy in Myanmar

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# ORGANIZATION STRUCTURE OF MOC



# Myanmar Trade Promotion Organization- MYANTRADE

## Vision

Positioning Myanmar as a regionally competitive trading nation to attain export- led development strategy through promoting Myanmar's enterprises.

## Mission

- To promote Myanmar's trade and exports to enabled local companies to compete effectively in the regional and global markets.
- The branding of 'Made- in-Myanmar' of goods and services will be the key focus of MYANTRADE.

# Trade volume from 2011-12 to 2015-16

VALUE- US\$ MILLION				
NO	FISCAL YEAR	EXPORT	IMPORT	VOLUME
1	2011-2012	9136	9035	18171
2	2012-2013	8977	9069	18046
3	2013-2014	11204	13760	24963
4	2014-2015	12524	16633	29157
5	2015-2016	11148	16496	27644

# Trade volume from 2011-12 to 2015-16

US\$ million

Description	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
<b>EXPORT</b>	<b>9135.60</b>	<b>8977.02</b>	<b>11203.96</b>	<b>12523.72</b>	<b>11148.27</b>
Agricultural products	2372.56	2696.74	2661.01	2919.63	2615.77
Animal products	90.69	32.89	15.42	8.29	8.01
Marine products	705.91	624.18	516.04	421.07	469.52
Minerals	897.71	399.06	1339.46	1498.88	968.35
Forest products	641.99	595.65	948.03	94.40	212.97
Manufacturing products	4083.95	4492.87	4637.50	6524.61	5745.72
Others Products	342.80	135.64	1086.50	1056.85	1127.93
<b>Import</b>	<b>9035.063</b>	<b>9068.914</b>	<b>13759.51</b>	<b>16633.146</b>	<b>16495.510</b>
Capital goods	3718.024	3842.453	5691.951	8037.561	8193.945
Intermediate goods	4071.566	3728.84	5684.034	5682.487	4808.583
Consumer goods	1245.473	1497.621	2383.522	2913.098	3492.982
<b>Trade Volume</b>	<b>18170.66</b>	<b>18045.93</b>	<b>24963.47</b>	<b>29156.86</b>	<b>27643.78</b>

### Top ten export items (2015-2016)

		value-US\$ million
Sr.no	commodity	Value
1	natural gas	4311.749
2	Garment	847.743
3	Jade	569.536
4	Matpe	498.358
5	Rice	409.986
6	Green Mung bean	326.851
7	Maize	302.031
8	mineral and ores	299.441
9	Fish	261.267
10	Toorwhole	229.752

Source : Customs Data + DCCA

### Top ten import items (2015-2016)

		value-US\$ million
Sr.no	commodity	Value
1	vehicle and spare parts	1838.972
2	Petroleum products	1679.747
3	Machinery and spare parts	1559.675
4	ship and spare parts	1123.8
5	iron and steel construction materials	823.091
6	iron and steel	819.296
7	Telephone and communication materials	602.85
8	Plastic raw materials	503.421
9	Palm oil	431.146
10	Motor bike	354.295

Source : Customs Data + DCCA

most of export items are primary products and value added products are still limited. There has been a high value of import of capital goods and other raw materials that led the trade deficit during last 4 years.



# Trade Liberalization

- Exemption on import of agriculture inputs (2012)
  - Agricultural Equipment and Machinery
  - Machine and Equipment for agriculture product processing and value adding
  - Fertilizer and Pesticide
- allow Re-export for potential items such as car tyre, sesame (white sesame, black sesame), dry chili, ground nut, cotton, soil bean seed, Textile, fresh fruits, electrical equipment, cosmetic, juice and food product, cotton, Oil, garlic.
- Allow (276) items (out of 4405 items) of import in the negative list, not need to get license in August 2016
- Allow 982 items (out of 9828 items) of export, not need to get license since 2015
- Allow to export the items such as sesame oil, mustard seed, mustard oil, sunflower seed, sunflower oil, oil extracted items, by product (from shrimp) in August 2016



# Myanmar National Trade Portal

<http://www.myanmartradeportal.gov.mm/>

NATIONAL TRADE PORTAL MYANMAR

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## Welcome to the National Trade Portal Myanmar

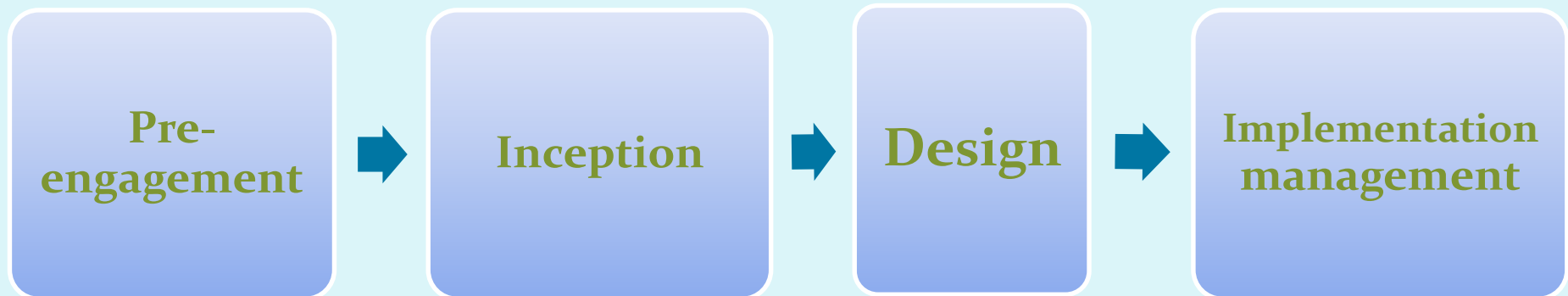
This website will help traders find all the information they require to import goods into Myanmar and export goods from Myanmar.

Click on the links on this page to look at information about all the Ministries involved in the import/export process, the regulatory requirements specific to each commodity, the relevant laws and regulations and other useful information.

The [Guide to Import-Export](#), on the top menu of this page, provides a comprehensive set of instructions and guidelines in plain language and conveniently organized by topic.

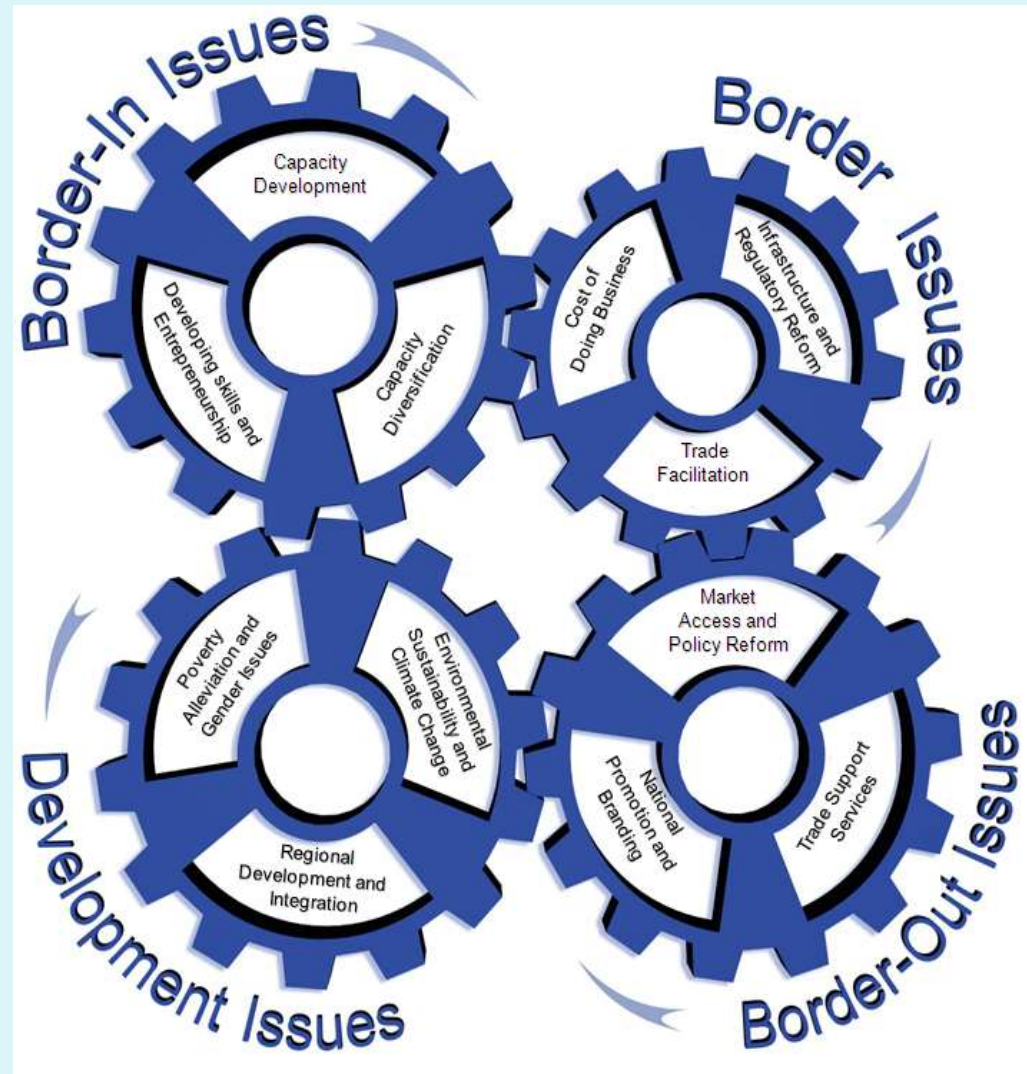
# Back ground information of National Export Strategy

- Financial support - GIZ, the German Technical Cooperation Agency,
- Technical assistance – International Trade Centre( ITC)
- Design phase ( Three consultations) - 2013-2014
- Government approval in December 2014
- Implementing period- 2015- 2019
- 5 years project for Trade related Technical assistance for Export Development & Competitiveness



# Export competitiveness issues (4-gears analysis)

- Supply-side capacities
- Business environment
- Market entry
- Developmental impact



# ***National Export Strategy***

## ***Vision***

***“Sustainable export-led growth and prosperity for an emerging Myanmar”***

## ***Strategic Objectives***

- 1. To foster sustainable inclusive and equitable export-led growth**
- 2. To ensure a consistent, predictable and transparent policy, legal and regulatory framework**
- 3. To develop competitive, diversified and branded exports by expanding productive capacities and fostering innovation**
- 4. To build enabled and supportive institutions**
- 5. Build physical trade infrastructures**

# **National Export Strategy**

## **Priority Sectors for Goods**

- 1. Rice**
- 2. Pulses & beans and oil seed crops**
- 3. Fishery**
- 4. Textile and Garments**
- 5. Wood based products**
- 6. Rubber**

## **Priority Sector for Services**

- 1. Tourism**

## **Cross-Sector Function**

- 1. Access to finance**
- 2. Trade information and promotion**
- 3. Quality Management**
- 4. Trade facilitation and logistics**

# Sector/cross-sector strategies

Each document contains:

- Trade performance diagnostic
- Institutional diagnostics
- Vision and strategic objectives
- Options for future development (markets, structural adjustments, etc.)
- Detailed plan of action (overall framework that will guide the implementation of the strategy)



# Rice Sector in the National Export Strategy



## Vision

“High-quality and environmentally sustainable growth in rice production and export for rural development and income generation”

## Objectives

- Increase rice production and quality substantially
- Increase efficiency and reduce costs through expansion of sector infrastructure
- Diversify export products and export markets
- Grow the rice sector in a way that promotes health, equitable growth and environmental sustainability



# Pulses & bean and oil seeds Sector in the National Export Strategy

## Vision

Contribute to the socioeconomic development of Myanmar by being a global provider of environmentally sustainable and value added products based on modern farming and trading techniques

## Objectives

- Increase the sector's production and productivity through enhanced farming techniques, upgrading of farmers' capacities, improved infrastructure and a reliable supply of quality inputs ;
- Enable compliance to international standards by modernizing and developing quality management systems ;
- Strengthen cooperation and efficiency by enhancing inter-institutional collaboration and private–public partnerships ;
- Strengthen the sector's ability to add value to its product through enhancing business management capacities and modernizing processing facilities and techniques ;
- Ensure continuous growth and global reach of the sector through reliable market information, efficient export procedures, targeted branding and improved promotion efforts.

# Quality Management Cross Sector

## Vision

A consistent and reliable national quality infrastructure continuously adapting to Myanmar's growth trajectory and enabling its products to be recognized nationally and internationally.

## Strategic Objectives

1. Revise and modernize policies, regulations, standards, and sanitary and phytosanitary ( SPS ) measures, and effectively implement them to comply with international regulations.
2. Upgrade the trade-facilitating technical regulatory framework in order to build confidence and transparency between producers and consumers and adequately develop trade.
3. Enhance awareness and knowledge of the importance of quality and embed a quality / safety culture with adoption of best practices in quality by farmers, processors, exporters and traders.
4. Improve coordination and collaboration both within the quality management infrastructure ( QMI ) – through strengthened public-private dialogue and partnerships – and with regional and international partners.

# Launching the Implementation of the NES

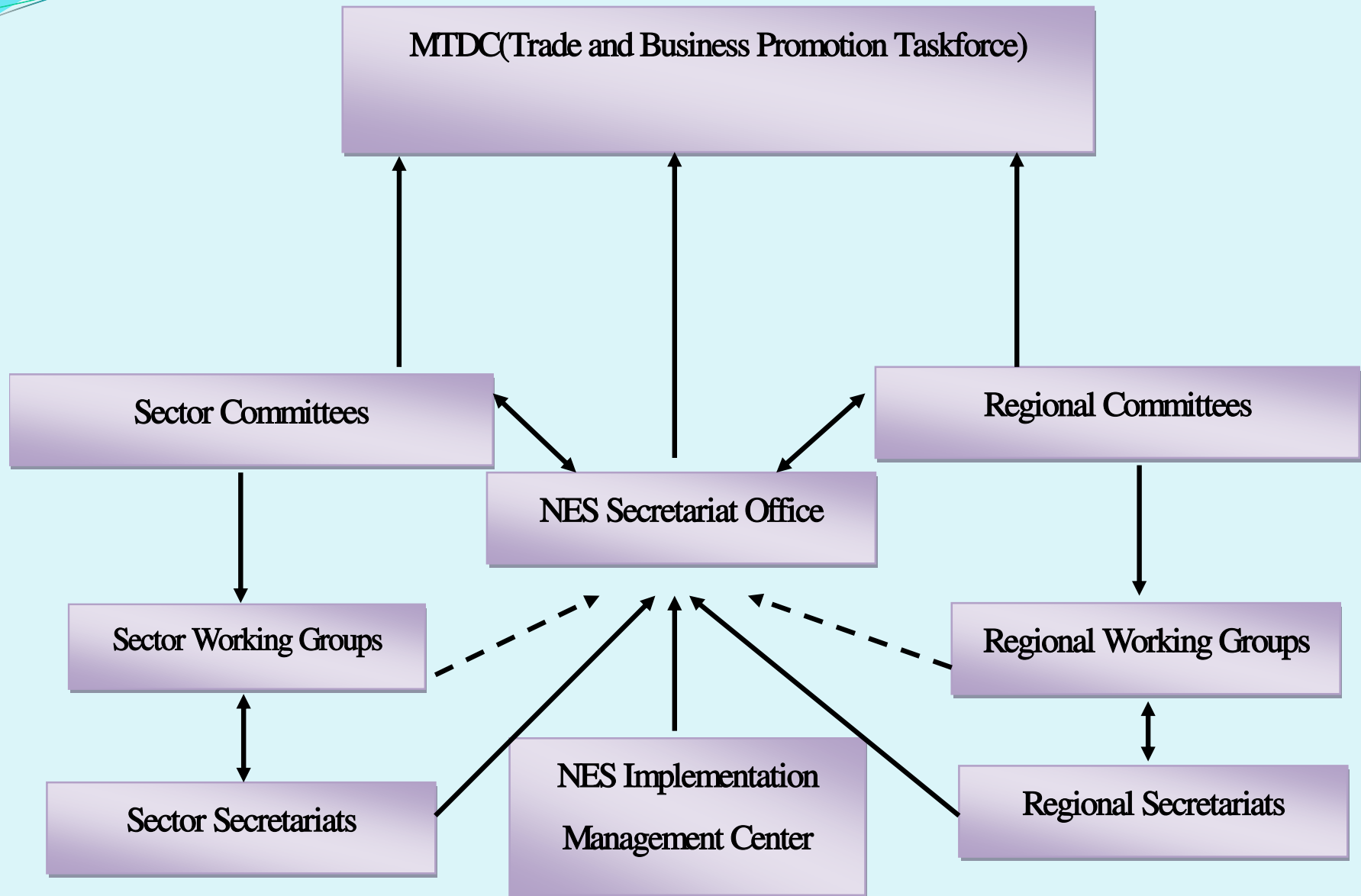


# Financing the strategy

- National resources through direct budget support
  - Ministries annual plans
- Donor support and interventions in line with the NES
- Mobilisation of investment
  - National private sector
  - Foreign direct investment



# NES Governance Structure



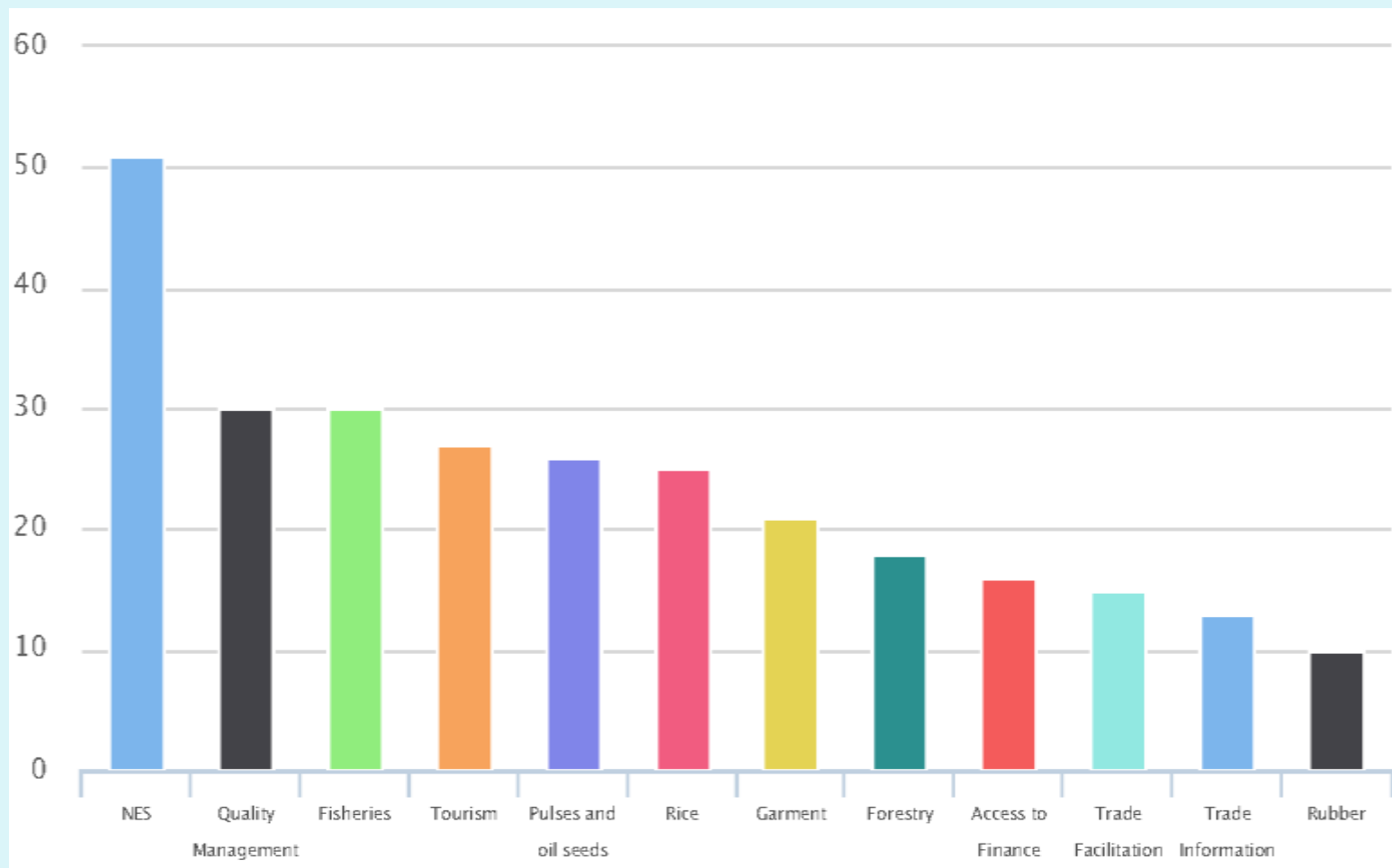
# Strategies Implementation Management Tool- SIMT

The screenshot shows the SIMT web application. The header includes the title 'STRATEGIES IMPLEMENTATION MANAGEMENT TOOL' and a user profile 'NES Myanmar' with the role 'MTDC\_secretariat'. The navigation bar contains links: Home, Data management, Management tool, Resource mobilization, Contact list, Document library, and Admin. The main content area is titled 'PROJECTS' and features a 'New project' button. Below this is a table listing projects.

NAME	SECTORS	START DATE	END DATE	FOCAL POINT NATIONAL INSTITUTION	EXECUTING AGENCY	RESOURCE PROVIDER	PROJECT BUDGET (USD)	ACTIONS
GRO-Myanmar (Generating Rubber Opportunities in Myanmar)	Rubber	11/1/2015	12/31/2020	Ministry of Agriculture and Irrigation	CARE	Swiss Agency for Development and Cooperation SDC	1,510,700.00	
NTF-III Myanmar - Inclusive Tourism Focusing on Kayah State	Tourism	9/1/2014	6/1/2017	Ministry of Hotels and Tourism	ITC	Government of the Netherlands (through CBG)	1,900,000.00	
					Physikalisch-Technische Bundesanstalt	BMZ - Germany Federal Ministry of Economic Cooperation and Development		

An online information system has been developed for key partners to collect information on the various initiatives contributing to the NES implementation. The SIMT system increase visibility of NES implementation progress by enabling the identification of linkages between trade development initiatives and the priorities defined in the NES.

# Number of NES activities receiving implementation support



According to the data collected so far there were 96 projects implemented in 2015-2016 from public, private and development partners involved in trade development in Myanmar contribute to the NES implementation.



# Implementing Projects

<b>Project Name</b>	– NTF III Myanmar Inclusive Tourism Focusing on Kayah State
<b>Value</b>	– US\$ 1.901 million
<b>Funding support</b>	- CBI
<b>Implementing Agency</b>	– International Trade Centre
<b>Partner Institutions</b>	– Ministry of Commerce, Ministry of Hotels & Tourism, Union of Myanmar Travel Association, Myanmar Tourism Marketing
<b>Project implementation-</b>	September 2014 to August 2017
<b>Output 1:</b>	Export capacity of tour operators and tourism-related suppliers of goods and services in Kayah state increased
<b>Output 2:</b>	Increased capacity of tourism associations (UMTA, MTM) as well as associations of tourism-related supply chains in providing sector development support services to their clients
<b>Output 3:</b>	Business linkages and collaboration created and enhanced

# Improving food safety and compliance with SPS measures to increase export revenues in the oilseeds value chain in Myanmar

**Value** – US\$ 0.977 million

Funding support – STDF

Implementing Agency – International Trade Centre

**Partner Institutions** – MoC, MoALI, MPBSSMA, DRI, FDA

Project implementation-2015 October to 2018 September

Objective - To increase export revenues of farmers, processors and exporters along the oilseed value chain through improved food safety and compliance with SPS measures for market access in the oilseed sector.

- Output 1: Strengthen capacity to improve compliance with GAP and SPS measures (including pest control, harvest, and post-harvest practices and pesticide use) by farmers;
- Output 2: Increased capacity for quality segregation of seeds and GHP at storage facilities;
- Output 3: Enhanced capacity to apply food safety control systems based on GHP, GMP, HACCP in oilseeds processing;
- Output 4: Increased linkages along the sector value chain and to export markets

# Implementing progress for oilseeds project

- Report on project base line collection
- Market survey
- Validation workshop
- Call for Expression of Interest (EoI)
- Training and workshop for key beneficiaries: GAP, HACCP

# Trade Information Sector Development

- Project – Initiatives for Trade Information Network (TIN).
- Project Value-£ 60000.00
- 6 Months period- From October 2015 to March 2016
- DFID of UK, Technical Assistance from ITC.

# Discussing on additional Sectors to put in NES

According to Myantrade Master Plan, Technical Assistance by KOTRA

- Agro Processing Industry
- Gems and Jewelry Industry

# Programs to secure export quality product

*Myanmar's trade is still facing major challenges in accessing foreign markets, such as basic technical requirements ( standards, technical regulations and SPS measures ).*

- **Quality management sector under the NES**

The strategy presents the expectations and the strategic objectives of the private and public sectors for the enhancement of the quality function in Myanmar. The action plan also provides a clear and detailed framework for the effective implementation of the **Quality strategy**.

**Project: Food safety and compliance with SPS measures for oil seeds sector value chain**

- **Trade Development Program (TDP)**

TDP focus on four key areas such as trade policy and trade promotion, trade facilitation, **food safety and National quality infrastructure**.

- **Diagnostic Trade Integration Study under the EIF**

- There are (22) standardization committees including agriculture sector and currently mainly focus on rice, beans and oil seeds with the adoption of CODEX.

**<http://www.myanmarstandards.org.mm>**

# Ways to move forward

- Selection sector priorities, prepare project proposal and approach to donors and development partners
- Cooperate in product quality development
- Trade information network to be established
- E- commerce system to be created
- International food quality standards and norms
- Technology and expertise
- Business matching and trade fairs





**THANK YOU**