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Report Highlights:

This guide serves as a resource for U.S. companies seeking to initiate or increase exports of U.S. consumer-oriented products to Burma. It provides an overview of the market potential, practical tips and information on local business practices, consumer preferences, trends, food standards and regulations, import procedures, entry approaches for the three major market sectors including food retail, food service, and food processing, and useful contacts.

Executive Summary:

Burma is a lower middle-income country with 54 million citizens and low economic development. In 2024, the International Monetary Fund forecasts Burma’s GDP to increase 1.5 percent to \$68.01 billion, positioning the country as the 86th largest economy in the world. In 2023, Burma’s imports of agricultural products reached \$3.5 billion, a 3 percent increase from 2022. In 2023, consumer-oriented goods accounted for \$1.7 billion, followed by intermediate goods at \$1.5 billion, and bulk imports at \$171 million. Trade continues, despite political and economic challenges, trade barriers, and ongoing civil conflict with Burma’s military regime that seized power in 2021.

Consumer-Oriented Agricultural Imports

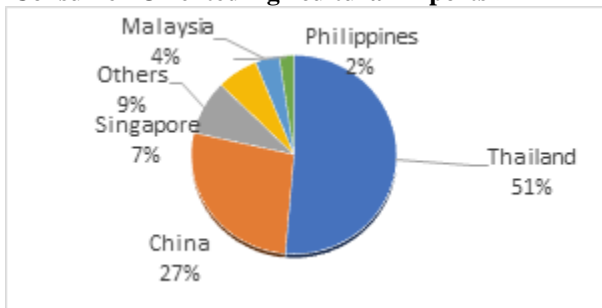


Chart 1: Top Exporting Countries to Burma 2023

Food Retail Industry:

The retail sector has a market size of \$10.57 billion in 2023 and is expected to grow 1.2 percent a year over the next five years according to Euromonitor. The number of modern retail stores is almost at seven percent of the retail sales, with growth especially in Yangon and Mandalay in 2024.

Food Processing Industry:

Burma’s food and beverage industry is comprised of over 24,000 registered private industrial enterprises, which account for 54 percent of the total manufacturing industry. Approximately 20 percent of these enterprises are large businesses. Nearly 90 percent of Burma’s food processing industry supplies the domestic market.

Food Service Industry:

Burma’s food service sales reached \$2.56 billion in 2023. Euromonitor forecasts a 15 percent growth in 2024. The number of bars, street stalls and full-service hotels and restaurants have significantly increased in Yangon and Mandalay in recent years primarily serving Burmese citizens. However, higher food cost, electricity shortages

and inconsistency of food supplies are still the main constraints.

Quick Facts CY 2023

Imports of Consumer-Oriented Products (US \$1.7 billion)

List of Top 10 Growth Products in Burma

- | | |
|-----------------------|----------------------------------|
| 1) Soybean Meal | 2) Wheat |
| 3) Soybeans | 4) Distillers Grains |
| 5) Food Preparations | 6) Other Intermediate Products |
| 7) Eggs & Products | 8) Dextrin, Peptones, & Proteins |
| 9) Other Feeds, Meals | 10) Dairy Products & Fodders |

Food Industry by Channels (U.S. billion)

Packaged Food Sales	\$3.2
Food Service Sales	\$2.56
Retail market size	\$10.57
Food and Agriculture Exports	\$4.3

Top 10 Retailers in Burma

- | | |
|--------------------|-----------------------------|
| 1) City Mart | 2) Marketplace by City Mart |
| 3) Makro Wholesale | 4) 1 Stop Supermarket |
| 5) Easy Mart | 6) Ocean |
| 7) Pro-Mart | 8) Capital Hyper Market |
| 9) Orange | 10) Sein Gay Har |

GDP/Population

Population (millions): 54.51
 GDP (billions USD): \$68.01 (as of 4/2024)
 GDP per capita (USD): \$1,250 (as of 4/2024)

Source: IMF, Trade Data Monitor LLC, Euromonitor, Myanmar Central Statistical Organization

Strengths/Weaknesses/Opportunities/Threats

Strength	Weakness
Potential for international food sales	High levels of local food industry protection resulting in trade barriers for some imported food & beverage products
Opportunity	Challenges
Growing demand for imported products due to limited domestic production capacity in Burma.	Unstable political situation and unfavorable business climate

Section I: Market Overview

Burma is a frontier market with a GDP of \$68.01 billion in 2024 and 0.9 percent growth year-over-year as economic conditions partly stabilized after the military coup in February 2021. Due to ongoing political unrest and a challenging security situation, Burma remains the poorest country in Southeast Asia with a per capita GDP of \$1,250 in 2024. An estimated 32 percent of its 54 million population lives in poverty according to the World Bank. More than 69 percent of the population was under the age of 18 before the coup, however, 10 to 20 percent of Burma's young people left the country after the coup to avoid the recently enacted [Myanmar's People Military Service Law](#), as well as in search for better employment and study opportunities abroad.

Burma's biggest trading partners are China, Thailand, Singapore, Japan, India, Indonesia, and Malaysia. Since the February 2021 coup, the United States, the United Kingdom, and the EU imposed continuous [targeted sanctions](#). The United States suspended its trade and investment framework agreement (TIFA) with Burma and instituted more stringent export controls in response to the coup. Subsequently, Burma's currency (the kyat) has substantially depreciated, household incomes declined, and prices of imported inputs and consumer goods spiked due to logistical challenges, increased tariffs, and frequent changes in government policies. Foreign Agricultural Service (FAS) Rangoon reported on some of these challenges in the report [Burma: Rising Food Prices due to Exchange Rate and Other Challenges](#).

According to Euromonitor's Country Report, Burma's prices of food and non-alcoholic beverages, alcoholic beverages, tobacco and housing recorded the highest growth at approximately 19 percent in 2022. The largest spending category in Burma was expenditures on food and non-alcoholic beverages, accounting for 56 percent of total expenditures, and is projected to be the largest consumer spending category through 2027. The Yangon region is anticipated to remain the largest consumer market in Burma by 2027, accounting for 17.7 percent of total consumer expenditure. Middle-income youth will continue to shape luxury spending trends, however according to Euromonitor, income inequality is set to rise to extremely high levels.

Exports of U.S. consumer-oriented goods remain low, especially with the unstable political and economic situation. Logistical challenges and the lack of direct U.S.-Burma shipping routes have led some importers to other suppliers, particularly China and Thailand, as they share a land border with Burma. Many importers prefer to import via third countries or over land borders to reduce supply uncertainty and delays at the ports, and to avoid complicated import procedures. Although political and economic turmoil persists, Burma remains a small market with some growth potential for consumer-oriented products. Burmese importers are still looking for high quality U.S. brands either through direct importation or importation via third countries. U.S. exporters should work closely with importers or reach out to FAS Rangoon for updates on the market situation as it evolves regularly.

Advantages and Challenges

ADVANTAGES	CHALLENGES
<ul style="list-style-type: none"> • A dynamic, eager, and young population is willing to try new products and is receptive to trends that fit their increasingly westernized lifestyles. • Restaurants, bars, fast food stalls and cafés which require a wide range of imported food products and ingredients. • U.S. products have a good reputation among experienced food and beverage importers. • Restaurants are offering more niche products to appeal to consumers with higher incomes by offering premium products. • Burma generally has tariffs that are comparable or lower than those of other countries in the region. 	<ul style="list-style-type: none"> • As the Financial Action Task Force (FATF) blacklists Burma, disruptions in the banking sector complicate money transfers. • Consumer purchasing power has declined due to falling income and inflation among workers. • Unstable electric power supply with consistent outages. • U.S. goods are more expensive due to the depreciation of the kyat against the U.S. dollar. • Limited direct shipping lines from the United States. • Border trade is still the main import channel after the coup. • A lack of transparency and predictability in Burma’s regulations. • U.S. and EU sanctions cause exporters to feel less confident about doing business in Burma. • Strong government protection of local agricultural products complicates market access for imported products.

Section II: Exporter Business Tips

Market Research: Before doing business in Burma, it is essential to conduct market research, including price comparisons, competitor analysis, consumer preferences, and trends. Market data is limited; however, some official import statistics and market information are available in the statistical data section of the [Burma Central Statistical Organization](#) and the [Ministry of Commerce website](#). Burma market sector reports and market and policy updates are available at [Burma | USDA Foreign Agricultural Service](#). FAS Rangoon (agrangoon@usda.gov) can provide contact information for potential importers, and recommends new-to-market U.S. exporters refer to the [Burma: FAIRS Annual Country Report](#) and [Burma's country commercial guide](#).

Business Partners: The best way to enter the Burma market is to partner with a representative, agent, importer, wholesaler, or distributor willing to introduce products and establish strong local connections with major retailers and restaurants. Complex regulations, costly and burdensome import procedures, and logistical concerns are some of the critical issues that most domestic HRI stakeholders are unlikely to handle.

Local Business Customs and Trends: Burmese consumers have a good impression of U.S. food products and regard them as premium and high-quality items. Most imported food and beverage products are from Thailand, Indonesia and China, which offer affordable price points for the middle-class population. U.S. firms need to be mindful with their pricing strategy as the Burmese market is very price sensitive. Fluctuating exchange rates and an irregular supply of consumer goods are the main factors contributing to retail prices.

General Customer Tastes and Preferences: More than ever, the market is highly price-sensitive, but consumer demand for quality products remains. Consumers with more access to education and higher incomes, particularly in the urban areas, are increasingly more conscious about where they eat and hygiene standards. There is an increasing trend of healthy food consumption among upper-class and middle-class consumers. Thanks to applications like [Food Panda](#), [Grab Food](#), etc. during the COVID-19 pandemic, rapid growth of food delivery emerged as a significant food trend. On-going urbanization encourages consumers to adopt lifestyles focused on convenience and speed, which lead to stronger sales of smaller format, ready-to-eat, and ready-to-cook meals. In the past year, both eat-in dining and online orders grew significantly. Additionally, increasing at-home consumption boosted retail sales.

Facebook is the most widely used media application and information source in Burma. There were [24.11 million internet users in Myanmar](#) in 2023, when internet penetration stood at 44 percent, of which 62 percent were social media users. Approximately [81.94 percent of social media users](#) have Facebook accounts. Other applications like TikTok, Viber, Telegram, and Signal were saw user growth after the coup when Facebook was not available. Facebook Live streaming sales, TikTok videos, recommendations from social influencers, food bloggers and delivery services through Facebook are also increasingly popular. FAS Rangoon launched the [Shaloot USA Facebook page](#) in October 2020 to introduce new U.S. products and connect with stakeholders in the food industry in Burma.

Section III: Import Food Standards, Regulations and Procedures

Different ministries and departments in Burma are involved in establishing food standards, regulations, and procedures for imported foods (see table in Section V). After the coup, the military regime tried to control the supply of U.S. dollars and reduce its trade deficit over time. The Central Bank of Myanmar (CBM) allowed importers and exporters to have bank accounts in both Chinese yuan and Thai baht at Authorized Dealer Licensed (AD) banks to facilitate border trade. The Burmese government requires all importers to apply for an import license through [Tradenet 2.0](#) according to the [Export/Import Bulletin \(9/2023\)](#). Burma continues to restrict the import of goods that compete with domestically produced goods to reduce import volume. For additional information, see [Burma: FAIRS Annual Country Report](#) and [Burmese Government Tightens Enforcement of Import License Procedures](#).

Customs Clearance: Burma utilizes the Burma Automated Cargo Clearance System (MACCS) at international ports, as well as the Yangon Airport International Cargo Terminal, and Thilawa Special Economic Zone operations (<https://www.maccs.gov.mm/c-o>). The importer must submit the customs declaration and supporting documents to Customs at the time that the goods arrive, as Customs has not yet adopted pre-arrival processing. The customs duty assessed on imported goods is a percentage of their declared value and ranges from 0-15 percent for agricultural products, except wine, which is 30 percent. The Myanmar Customs Department published the latest version of [Myanmar Customs Tariff 2022](#) in October 2022. The import tariff for wheat grain, soybean meal, DDGS, and wine did not change, while

the tariff rates for other food items increased. To clear Customs, imports must be accompanied by a customs declaration and the following documents:

- 1) An Import License/Permit ([See the required documents for most agricultural products](#))
- 2) Invoice
- 3) Bill of lading, air consignment note, or truck note
- 4) Packing list
- 5) Other certificates, permits or import recommendations, which vary by product category.

The Ministry of Commerce suspended the import of various beverages (e.g., coffee and tea mixes, instant coffee, condensed milk, and evaporated milk) via the Burma-Thailand border on May 1, 2021. However, importers can still import these products via maritime trade.

Documents Generally Required by the Country Authority for Imported Food: Burma Food and Drug Administration is responsible for issuing import recommendations (IR) and import health certificates (IHC) for imported packaged food and beverage products, as well as overall quality control of processed food, imported food, and food for export. Most product categories require third-party certificates, such as good manufacturing practices (GMP) plus Hazard Analysis Critical Control Point (HACCP), or ISO 22000 (food safety management) certificates in addition to federal phytosanitary, sanitary, or health certificates. In addition, import licenses are required for [most agricultural products that the United States currently exported to Burma](#). For processed food and beverage products, product testing must be conducted in the country of origin. Additional information is available in [Burma: FAIRS Annual Country Report](#).

Country Language Labeling Requirements: Burma follows Codex guidelines and the ASEAN Common Principles and Requirements. Burma's Consumer Protection Law and a notification by its Food and Drug Administration require specific information to be presented in Burmese on the label. Additional information is available in [Burma: Burma Releases Labeling Order for Prepackage Food and draft guidelines on nutrition labeling and nutrition claims for prepackaged foods](#), which are parts of the National Food Law.

Tariffs and FTAs: Burma is a member of the Association of Southeast Asian Nations (ASEAN) free trade area and is therefore party to the ASEAN agreements with Australia, New Zealand, China, India, Japan, and South Korea. Burma also has bilateral trade agreements with several East European countries but does not have a bilateral taxation treaty with the United States. Burma is a member of the World Trade Organization, and U.S. products are subject to Most Favored Nation tariffs.

Trademarks and Patents Market Research: Burma enacted the Trademark Law on January 30, 2019, establishing the Intellectual Property Rights Central Committee and the Intellectual Property Rights Agency under the Ministry of Commerce. Information about the application process for the registration of trademarks is available in [Burma: FAIRS Annual Country Report](#).

Section IV: Market Sector Structure and Trends

As consequence of a military coup and control over importation, the market exchange rate hovers around 6,000 Myanmar kyat/U.S. dollar as of August 2024, which is a 44 percent jump compared to last year's exchange rate. The volatile exchange rate directly impacted the income and expenditure of consumer spending power. Income inequality is set to rise to extremely high levels in global terms. Food and the non-alcoholic beverages categories are the largest consumer spending areas occupying 54 percent of total expenditures. In 2023, Burma expenditures on food and non-alcoholic beverages per household reached \$1,760.5, with the total Burma consumer expenditures on food and non-alcoholic beverages of \$22,359 million, according to Euromonitor.

Burma consumer's Expenditures on Food and Non-alcoholic beverages in 2018 - 2023

Unit	2018	2019	2020	2021	2022	2023
US\$ million	21,381.2	20,406.5	23,511.8	20,715.0	19,178.4	22,359.1
US\$ per household	1,830.1	1,717.5	1,945.8	1,686.2	1,535.5	1,760.5

Source: Euromonitor International 2023

Retail: The retail sector is the fastest growing sector, followed by the HRI and food processing sectors. According to Euromonitor, the market size of Burma's packaged food retail reached over \$3.2 billion in 2023. Since 2018, [Burma has allowed 100 percent foreign-owned retailers and wholesalers](#) to distribute domestically produced and imported commodities. The retail sector has become the biggest growth opportunity for imported products since the pandemic and the coup, as more people cook at home and there is rising demand for convenient ready-to-eat meals, healthy food products and food delivery. About 70 percent of traditional physical stores now include an online shopping option. Approximately 90 percent of households in Burma still depend on the wet market and the main wholesale wet markets in Yangon are Thri Mingalar Market and Danyingone, where most fruits importers are based. Although UK's Tesco and Japan's Aeon mall projects were suspended in 2021 after the coup, France's Carrefour Easy Convenience Stores (named "Easy Mart" in Burma), which opened in 2020, expanded to over 30 outlets in 2023. On the other hand, Makro Myanmar is planning for a second wholesale market in the country.

Tourism: International tourism has plummeted after the pandemic and the 2021 coup. According to the 2022 [statistical data of Tourism Myanmar](#), a foreign visitor stays 11 nights and spends on average \$97 a day. Total expenditures of foreign visitors in 2022 was \$249.13 million. Due to civil unrest and armed conflict, the U.S. government advises against travel to Burma ([Level 4: Do Not Travel](#) with updated [security alert released on October 20, 2023](#)). Nonetheless, the military regime is eager to revitalize Burma's tourism industry. The Ministry of Hotels and Tourism aims to attract more Russian, Chinese, and Indian tourists in the next few years. More information can be found in [Arrivals 2022 Myanmar](#).

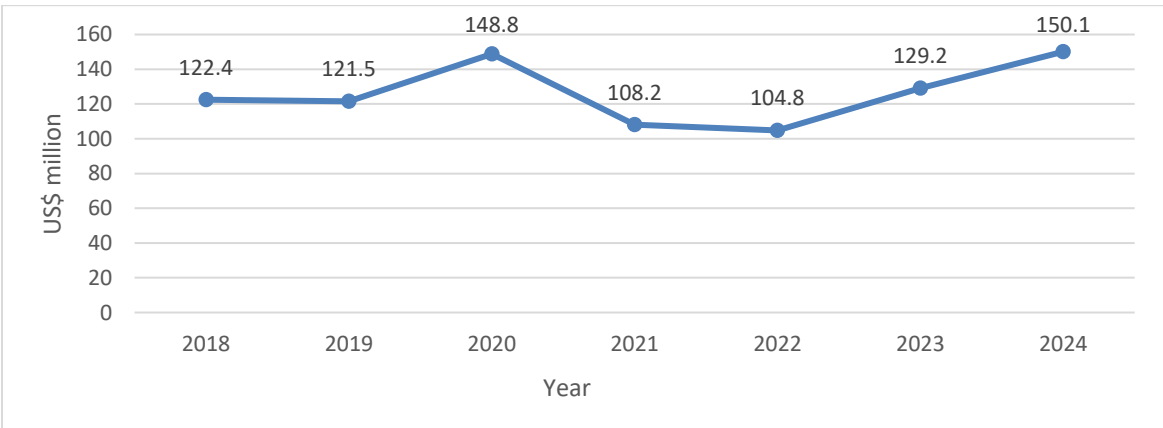
HRI: There are more than 2,300 registered hotels and guesthouses across the country, 21 percent of which are in Yangon, 12 percent in Mandalay, 7 percent in Bagan, 4 percent in Nay Pyi Taw, 5 percent in Nyaung Shwe, and the other 20 percent in other regions. There are [17 international hotel chains](#) in Burma. By September 2023, the permitted foreign investment in the hotel and tourism sector (led by Singaporean, Thailand, and Vietnamese companies) was \$3 billion or 3.5 percent of total foreign investments. Beyond business clientele, the HORECA hotel sector is also serving Burmese seeking

electricity during outages and fleeing from civil war areas including Rakhine, Northern Shan, Sagaing, Magway, Kachin, and Mandalay regions for long stay. Burma’s food service sales reached \$2.56 billion in 2023, and the growth forecast for 2024 is 15 percent according to Euromonitor. In recent years, the number of bars, street stalls and full-service hotels and restaurants has seen significant growth after the pandemic, especially in Yangon and Mandalay. However, higher food costs, electricity shortages, and the inconsistency of food supplies are still main constraints to operations and growth. Several established higher-end hoteliers have sold their properties after the pandemic and 2021 coup. Within Burma, there are foreign fast-food chains including: KFC, Bonchon, Lotteria, Pizza Hut, Burger King, Marry Brown, The Pizza Company, Ya Kun Coffee & Toast, Gloria Jean's Coffees, Gong Cha, and more. The American brand KFC grew to nearly 50 outlets by the end of 2023.

Food Processing: Burma’s food processing sector has seen growing demand over time due to limited ingredients available and produced in-country. Burma’s food and beverage industry is comprised of over [24,000 registered private industrial enterprises](#), which account for 54 percent of the total manufacturing industry. Imports have increased for soybeans, used for animal feed meal and also for wheat, used for instant noodle production and bakery sector. These are the top U.S. exported products with insufficient domestic supply. Additionally, there are limited resources to produce dairy products like cheeses, butter, milk, and long-self life milk products domestically. Burma mostly processes the basic commodities, such as rice, beans, maize and other agricultural products, and exports excess products. Domestic production includes cooking oil, spirits, beer, soft drinks, instant noodles, confections, coffee, tea, and ready-to-eat traditional foods and processed meats. Almost 90 percent of food processing sales are focused on the domestic market. Industrial production data can be found in the [Ministry of Planning and Finance: Quarterly Statistics Bulletin](#).

Alcoholic Drinks: Consumer spending on alcoholic drinks is a significantly growing category. Burma’s most popular alcoholic drink is beer, dominated by international players like Heineken, ThaiBev and Carlsberg manufacturers producing in-country. Wine and liquors are allowed to be imported, while beer is not allowed, so as to protect the local producers. The total value of alcoholic drink sales was \$150 million in 2023, a 28 percent growth relative to 2021.

Chart 2. Consumer Expenditures on Alcoholic Beverages in 2018-2023



Source: Euromonitor International 2023

Though the military regime tries to encourage production of export quality products, the small and medium-sized enterprises are struggling to survive due to power outages, difficulty in getting import licenses, higher raw material prices and labor shortages because of newly enacted [Myanmar's People Military Service Law](#).

Section V: Agricultural and Food Imports

Economic conditions have partially stabilized after the military coup in 2023. U.S. agricultural exports jumped up to \$125 million, a 44 percent increase compared to 2022. Feed ingredients, including soybean meal, distiller's dried grains with solubles (DDGS), and soybeans, account for two thirds of U.S. agricultural exports to Burma. Soybean meal is the top U.S. export to Burma with a 35 percent market share, and it primarily competes with Brazil with 26 percent, India with 12 percent and Paraguay with 12 percent market share of exports brought into Myanmar. Australia is the main supplier competitor with a 72 percent market share of Burma's total wheat grain imports, compared to 24 percent share for U.S. wheat. For consumer-oriented products, Thailand, China, Singapore, Malaysia, Indonesia and Philippines are the top suppliers benefitting from their proximity to Burma. Still, the United States, New Zealand and EU effectively compete with Asian suppliers in exports of dairy products, food preparations, and processed vegetables- especially potatoes and fresh fruits. In 2023, the United States was the seventh-largest supplier of agricultural and related products to Burma. Burma's top foreign suppliers for agricultural and related products in 2023 included Thailand (\$ 421 million), Indonesia (\$573 million) and China (\$637 million). Thailand's and Indonesia's top exports to Burma include non-alcoholic beverages, palm oil, soup and food preps, bakery goods, cereals & pasta, distilled spirits, dairy products, and vegetable oil. China exports food preparations, processed vegetables, forest products, and fresh vegetables.

U.S. Agricultural Product Exports to Burma

Product Categories	U.S. Exports to Burma (million US\$)				
	2019	2020	2021	2022	2023
Soybean meal	99.60	87.45	56.39	42.25	75.96
Wheat	19.31	28.03	15.76	24.53	32.65
Soybeans	13.37	14.84	2.06	6.93	5.59
Distillers Grains	15.71	14.47	6.32	3.89	4.2
Chocolate & Cocoa Products	0.10	0.04	0.03	0.21	0
Dairy Products	2.63	1.20	0.67	1.70	0.48
Eggs & Products	0.34	0.30	0	0.04	0.64
Non-Alcoholic Bev. (ex. juices, coffee, tea)	0.96	1.27	1.12	0	0.08
Fresh Fruit	1.00	0.55	0.14	0.15	0
Processed Vegetables	0.96	0.70	0.32	0.42	0.04
Food Preparations	2.16	1.77	2.19	0.73	0.7
Wine & Related Products	0.27	0.10	0.06	0.15	0
Total Consumer-oriented Products	11.32	6.98	4.85	5.03	3.97
Agricultural Products	174.04	166.78	90.47	86.79	125.90
Seafood Products	0.78	0.23	0.02	0.16	0.95
Agricultural and Related Products	174.96	167.03	90.53	86.96	126.87

Source: [GATS](#)

Best High-Value, Consumer-Oriented Product Prospects

- Food Preparations: food colors, food mix, can foods, sugar, gelatin
- Distilled Spirits
- Dairy products: cheese, cream cheese, whipped cream, cheese dip, nonfat dry milk, condensed milk
- Bakery Goods, Cereals, & Pasta
- Fresh fruits: apples, oranges, grapes, cherry, kiwi, lemon, blueberry, berries
- Condiments and sauces: vinegar, tomato sauce, chili sauce
- Wine & related

Section VI: Key Contacts and Further Information

Different ministries within the Burmese government set import requirements for agricultural products. A general breakdown of government oversight is provided below:

Plants and plant products, plant-based feed ingredients, seeds, pesticides, fertilizers	Department of Agriculture (DOA) under Ministry of Agriculture Livestock and Irrigation (MOALI)
Live animals, meat and poultry products, animal-based feed ingredients, veterinary medicine/pharmaceuticals	Livestock Breeding and Veterinary Department (LBVD) under Ministry of Agriculture Livestock and Irrigation (MOALI)
Seafood and seafood products, feed ingredients for aquaculture	Department of Fisheries (DOF) under Ministry of Agriculture Livestock and Irrigation (MOALI)
Packaged food and beverage products, including distilled spirits and wine	Department of Food and Drug Administration (FDA) under Ministry of Health and Sports (MOHS)
Import licenses	Ministry of Commerce
Customs	Burma Customs Department

The Foreign Agricultural Service office in Rangoon, Burma maintains current information about import requirements and food and agricultural import opportunities. The office can provide lists of potential importers and distributors, associations, and other key contacts. Please contact our office with questions or comments:

Agricultural Affairs Office	Phone: +95-1-536509
Physical Address:	Email: agrangoon@fas.usda.gov
U.S. Embassy	
110 University Avenue, Kamayut Township	
11041, Yangon, Burma	
http://www.fas.usda.gov	

Attachments:

[BICO Report - U.S. Exports of Agricultural & Related Products to Burma 2019-2023.doc](#)