



National Export Strategy and linking up to Regional and Global Value Chain

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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

Overview of the NES

- A part of Myanmar's efforts to improve socioeconomic conditions through increased and sustainable trade.
- A five-year roadmap detailing the trade development needs and priorities in cooperation with public and private sectors
- Defines a broad scope of interventions with aspect of supply side, business environment, and market entry
- An official strategy document of Myanmar endorsed by the Union Cabinet Economic Committee on 04 December 2014.
- To grow export competitiveness and diversification.



National Export Strategy

Priority Sectors

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

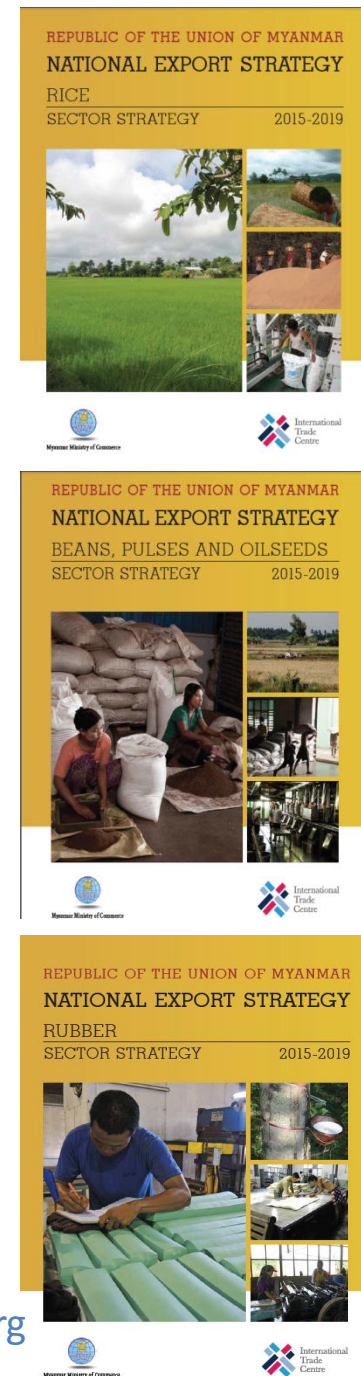
Cross-Sector Function

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

Post-NES Priority Sectors

- **Agro Processing Industry** (Myantrade Master Plan)
- **Gems and Jewelry Industry** (Myantrade Master Plan)
- **Fruits and vegetables**
- **Handicrafts**
- **Information and communication Technology**

www.myantrade.org



NES implementation progress (2015-19)

The NES is a key trade and investment pillar in line with country's MSDP, PSD Framework and other trade and industry development plans.

- the results of NES implementation up to date are :

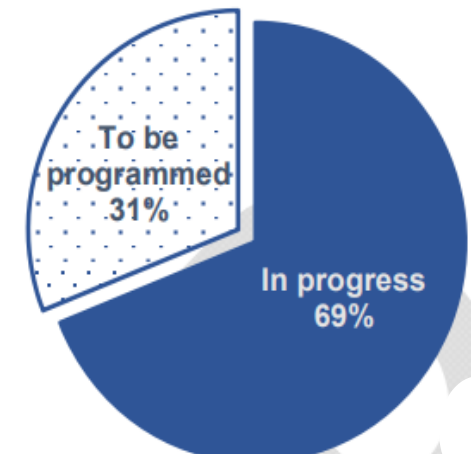
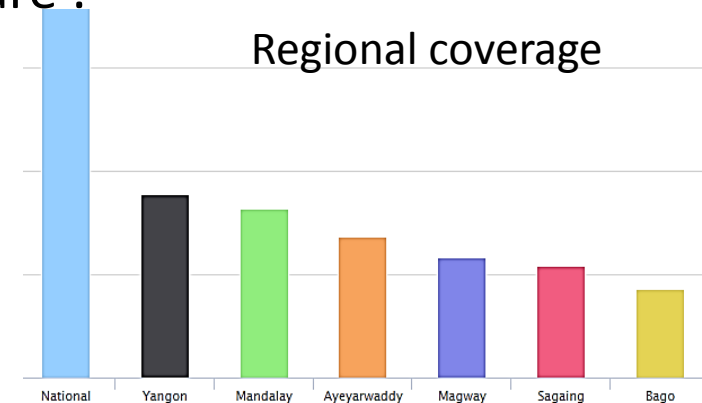
- 131 trade development projects, including national budget initiatives contribute(d) to the NES implementation;

- Implementation of activities supported –69%;

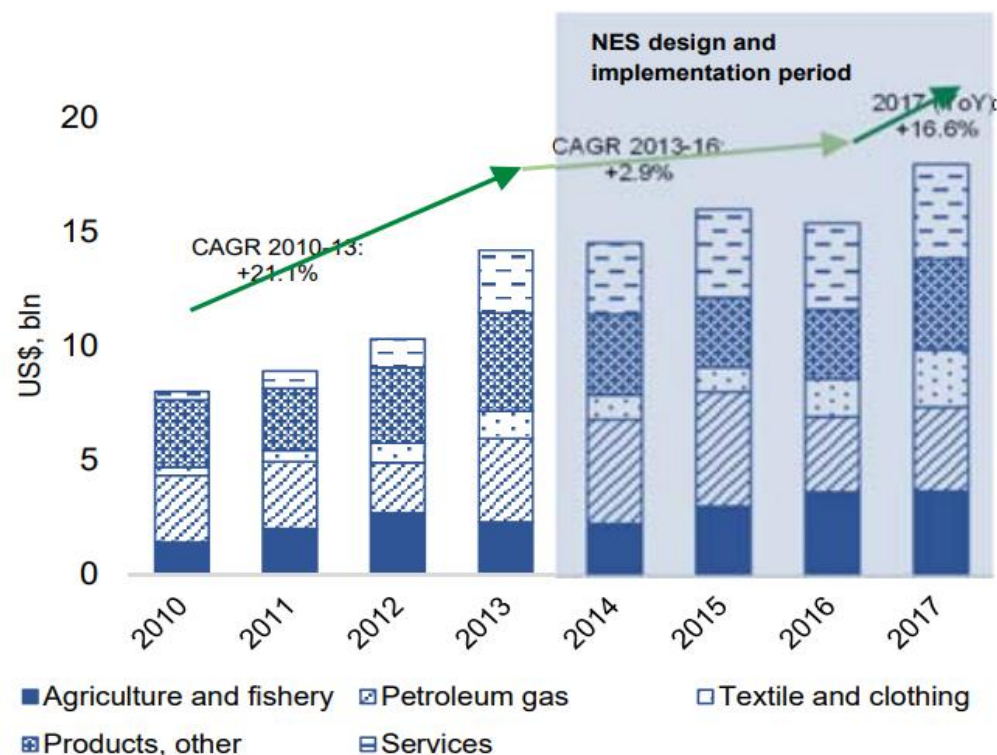
- More than two third of activities are currently under implementation or completed

- Most of the activities are at the national level.

Yangon, Mandalay, Ayarwaddy and Magway are the Main beneficiaries of support.



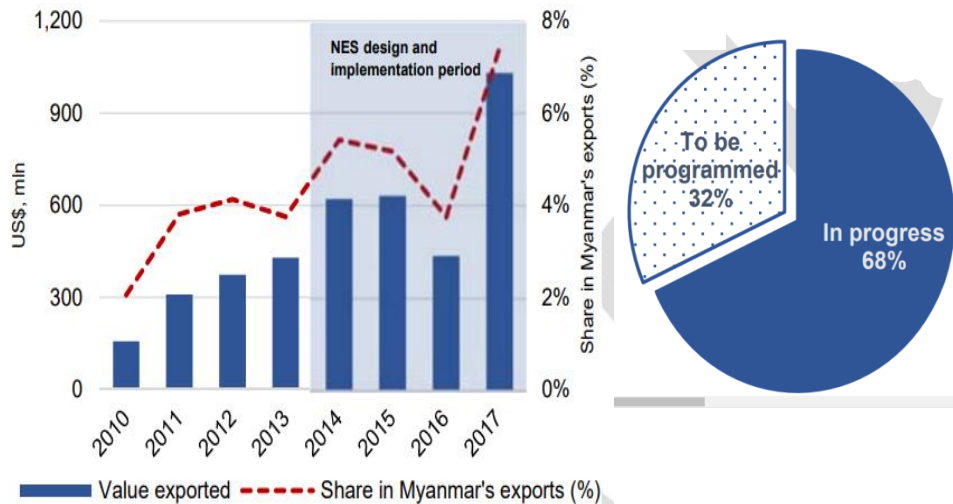
Myanmar export of goods and services



Trade volume (USD Million)

Sr.	Description	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-18
1	Export	8977.015	11203.96	12523.717	11136.878	11904.39	14675.21
2	Import	9068.914	13759.51	16633.146	16577.948	17198.85	18648.60
3	Trade Volume	18045.929	24963.46	29156.863	27714.826	29103.25	33323.82
4	Trade Balance	-91.899	-2555.55	-4109.429	-5441.07	-5294.461	-3973.39

Rice sector export performance



Source: ITC calculations based on UNComtrade data

Sector strategy progress

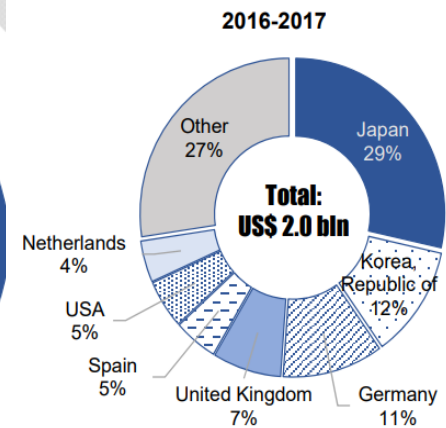
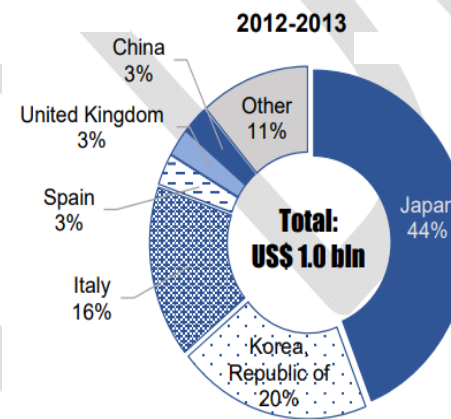
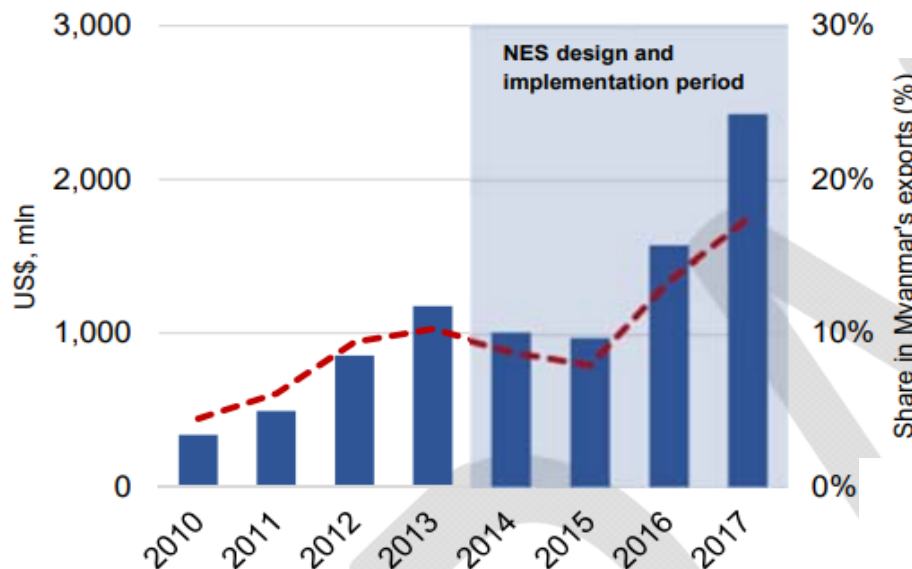
➤ a surge in exports earnings in 2017, largely driven by higher demand from African countries and facilitated by trade agreements with Sri Lanka and Bangladesh.

► 40 trade development projects contribute(d) to the rice strategy implementation.

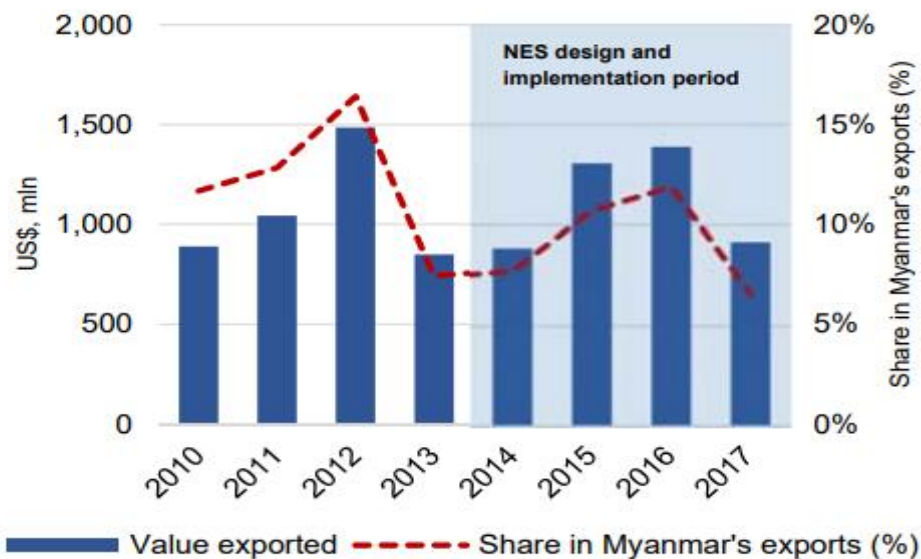
► 68% of the strategy's activities are under implementation or completed.

► Mandalay, Yangon, Ayarwaddy and Sagaing are the main beneficiary regions/states of support.

Myanmar exports of textiles & garments



Myanmar exports of pulses and beans



Source: ITC calculations based on UNComtrade data

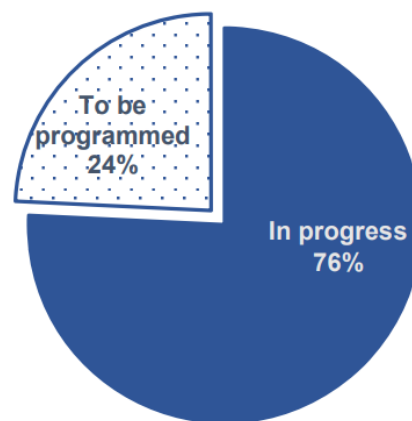
SUCCESS STORIES

Since 2016, Myanmar GAP Certificates have been issued for over 15 crops including peanuts, green mung beans, paddy, sesame and winter crops and onsite post-harvest GAP Trainings to project-related growers

Myanmar Beans and Pulses Market Promotion Forum in China, the first promotional event sponsored abroad to win new markets for Myanmar pulses and beans as well as additional workshops organized by the Myanmar government.

Sector strategy progress

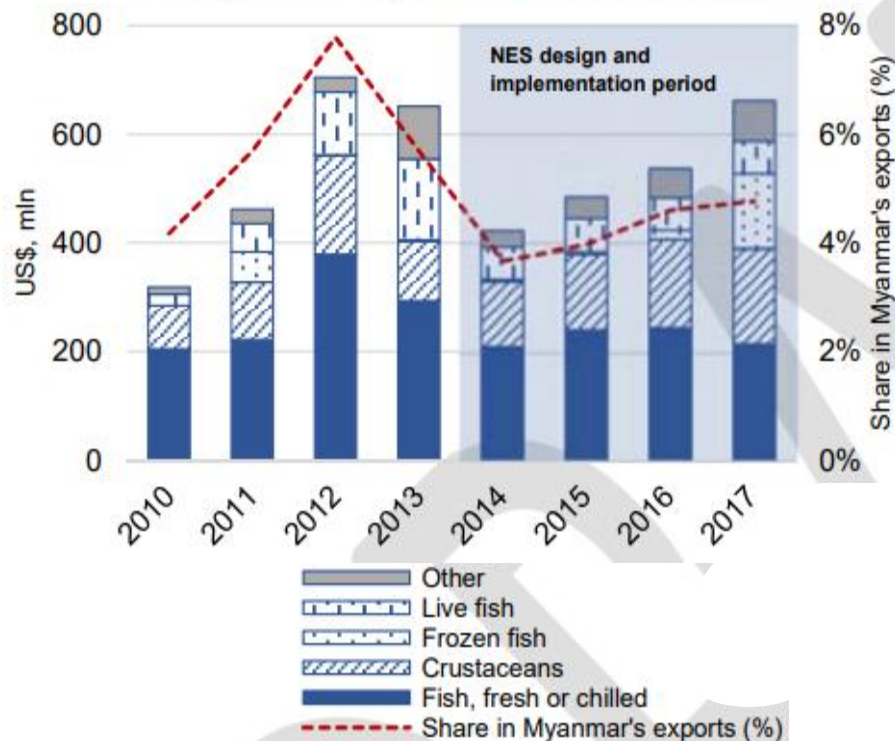
- 36 trade development projects contribute to the pulses, beans and oilseeds strategy implementation.
- 76% of the strategy's activities are under implementation, or completed.
- Mandalay, Yangon, Ayarwaddy and Magway, are the main beneficiary regions/states of support.



Year	export value (million US\$)	MT(million)
2013-14	946.673	1.369
2014-15	200.096	1.497
2015-16	1214.991	1.242
2016-17	1398.905	1.424
2017-18	883.753	1.313

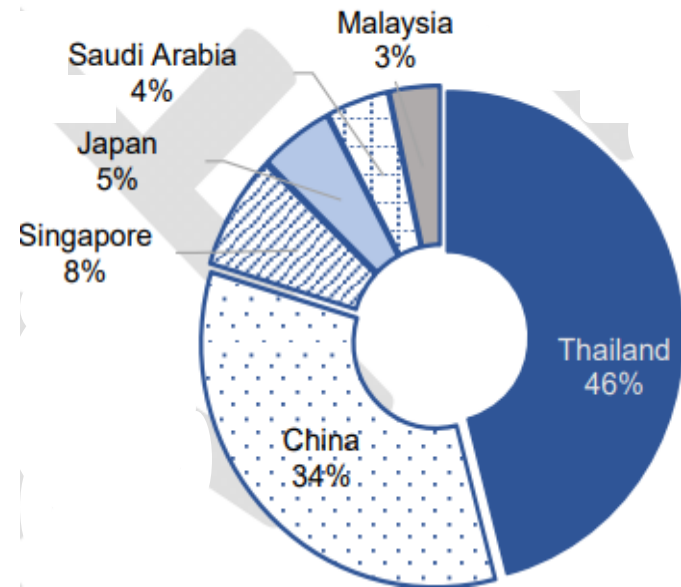


Myanmar exports of fish and crustaceans



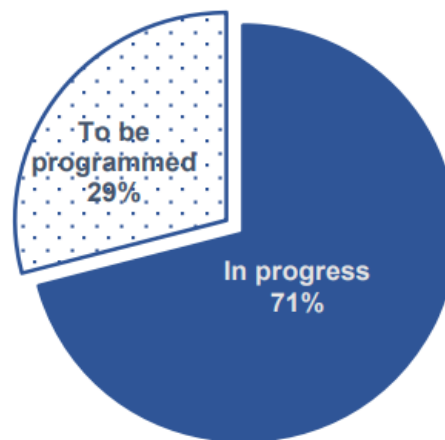
Source: ITC calculations based on UNComtrade data

2016-2017 (average)



Sector strategy progress

- 18 trade development projects contribute(d) to the fisheries strategy implementation.
- 71% of the strategy's activities are under implementation, or completed
- Ayarwaddy and Yangon are the main beneficiary regions of support.



SUCCESS STORIES

Trade Fair Participation at the Seafood Expo Global 2018, supported by TDP

- Myanmar fishery products were presented and promoted
- Myanmar seafood companies met with potential buyers and successfully established nearly 260 new business contacts



Fishery export



Quantity-Metric Ton
Value – US\$ Million

Year	Fish		Prawns		Others		Total	
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
2011-2012	320348.838	467.637	26807.587	92.377	75081.799	145.891	422238.224	705.905
2012-2013	334487.951	409.553	24122.381	80.305	172518.026	134.32	531128.358	624.178
2013-2014	273559	259.411	38549	43.25	327514	213.382	639622	516.043
2014-2015	680576.73	232.763	17679.218	45.093	326864.354	143.213	1025120.3	421.069
2015-2016	731757.887	264.64	89580.436	45.447	234700.078	159.435	1056038.4	469.522
2016-2017	358615.702	325.743	15301.522	57.935	128697.621	198.094	502614.845	581.772
2017-2018	401153	396.988	18333	71.804	142842	228.95	562328	697.742

Source: Customs Department

Implemented/implementing projects under the NES (focal point by MoC)

- Inclusive Tourism Focusing on Kayah State and extension in Thaninthayi region (ITC-CBI)
- Improving food safety and compliance with SPS measures to increase export revenues in the oilseeds value chain in Myanmar (ITC- STDF)
- Upgrading Horticulture Supply Capacity and Responsible Tourism to Develop Business Linkages in Inlay lake areas in Shan State (Swiss Government – UN clusters)
- Trade and Investment Project (ITC-DFID)

NES Challenges and Lessons Learnt

- NES is to be considered as a whole of government and private sector effort.
- The tracking of NES implementation remains challenging with regards to data collection, entry, analysis and reporting.
- The NES document action plans need with a more synthetic version
- Investment needs and policy/regulatory changes need to be further highlighted to streamline implementation.
- NES sectors implementing Committee have to be strong and provide guidance and recommendation
- More cooperation between Ministries, associations and all inclusive participation in the implementation
- need to establish effective monitoring system for NES 2020-2025

The First NES Symposium (2020-2025) in March 2019

- The Vice-President of the Republic of the Union of Myanmar inaugurated the start of NES 2020-2025 design process.
- An analysis of trade performance and export trends, as well as a presentation of NES 2015-2019 implementation progress completed.
- 180 public-private sector representatives participated in the event.
- Participants discussed key national bottlenecks for export development.
- NES 2020-2025 vision and strategic orientations were identified.



NES 2020-2025: proposed strategic orientation

Vision:

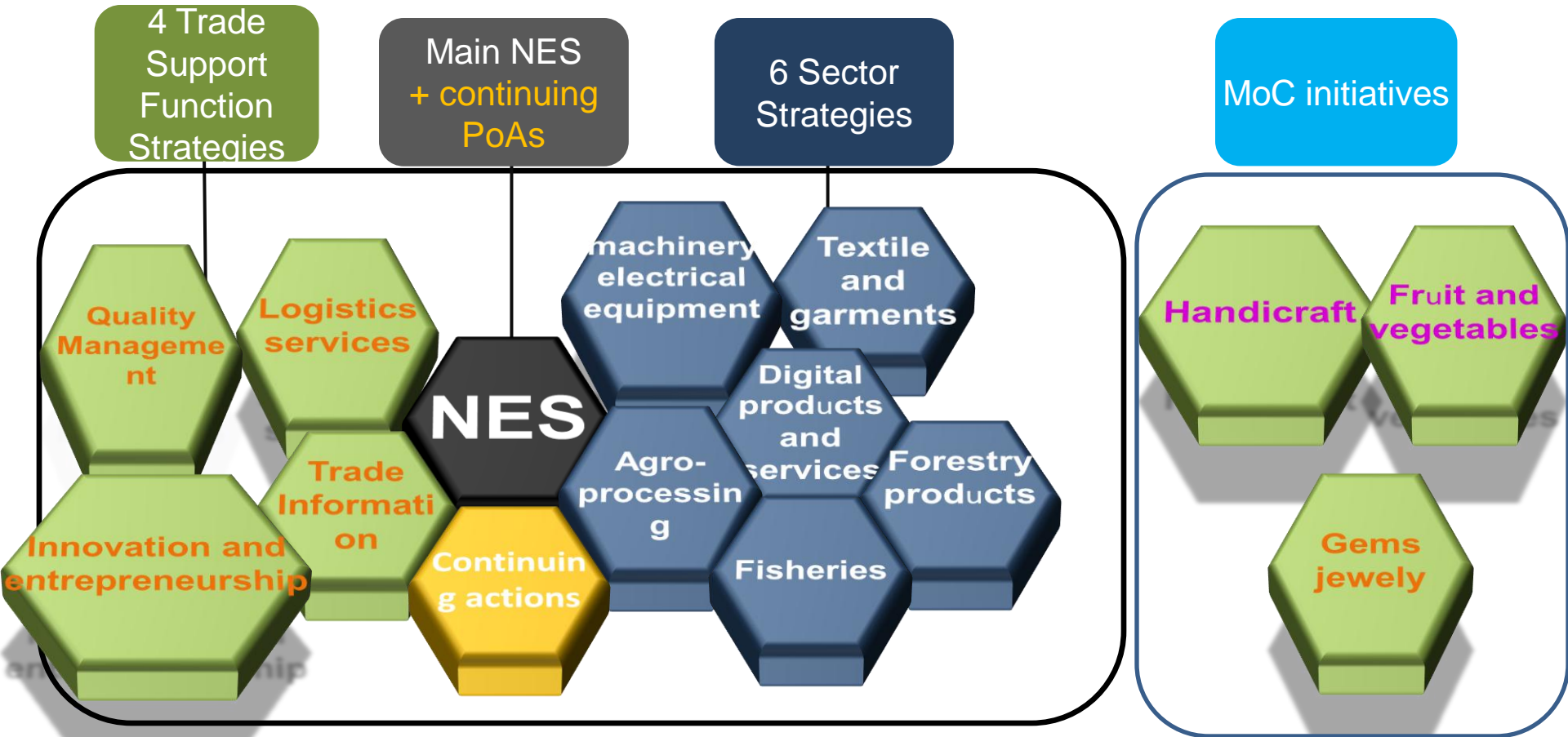
***“Sustainable export-led growth and prosperity
for Emerging Myanmar”***

Strategic objectives:

1. Foster an enabling institutional and regulatory environment for sustainable export growth.
2. Expand existing productive capacities and develop value added exports.
3. Stimulate innovation and technology acquisition to diversify exports.

NES 2020-2025 structure

Recommended sectors and TSFs for NES 2020-2025 are aligned to NES strategic orientation of expanding productive capacities, increasing value addition, introducing innovation and enhancing diversification.



Continuing sectors: Rice, Pules and oilseeds, Rubber, Access to finance, Tourism

Linking up to Regional and Global value chain

Global value chain (GVC) describes the people and activities involved in the production of a goods or services and its supply, distribution and post-sales activities when activities must be coordinated across geographies.

- NES sectors implementation focus on export development and competitiveness with regards to productivity and compliance to international market requirements, market diversification, strengthening of sector organization, improvement of innovation capacity and branding.
- Implementation of NES contribute to the participation in Regional value chain (RVC) and Global value chain (GVC) in terms of policy reform, institutional capacity, productivity and market diversification, logistics capacity, transparency and efficiency, digital services etc.

THANK YOU