COUNTRY REPORT OF MYANMAR

A. Introduction

Myanmar has lived with a centrally-planned economy for more than a quarter of a century until her adoption of the market-oriented economic system in September 1988. Since then, the state started restructuring its State Economic Enterprises (SEEs) under different Ministries, lowering trade barriers and simplifying export/import procedures for active participation of private investors. Likewise, the foreign investors are being invited for the many projects needing heavy investment and high technology. (Please see details in attachment 1)

In line with the growth of external and internal trade, priorities are given to modernization and rationalization of the national shipping industry and port facilities. Thanks to significant growth in foreign trade, international maritime transport in term of conventional and containerized cargo tonnage has doubled.

The Port of Yangon has been upgraded and expanded for handling of the burgeoning container traffic. One government-owned (Botataung Street Warf) and two private-owned (Myanmar International Terminals Thilawa, Asia World Port Terminal) container terminals with modern cargo gears has emerged. Inland container depots, one government-owned (ICD-2), one joint venture (ICD-1) and one private-owned (MIP) were established for container storage.

B. Current status of maritime transport industry in Myanmar

1. Focus on capacity: fleet size and port capacity
   at end of year 2000

Fleet size

On the State-owned sector, the Myanmar maritime transport industry centres mainly concerned with Myanmar Five Star Line (MFSL) and Myanmar Port Authority (MPA).

Myanmar Five Star Line, the national flag carrier with well over four decade experience provides regular and reliable services to satisfy the nation’s seaborne trade international as well as coastal.

MFSL has a fleet of 26 vessels with its total deadweight 161,344 DWT. In foreign trade, MFSL employs 16 vessels with their carrying capacities ranging from 13,000 to 2,000 DWT. In Coastal trade, MFSL operates 10 vessels ranging from 1,700 to 600 DWT. (Please see details in attachment 2)

Port capacity

MPA, an SEE under the Ministry of Transport like MFSL is responsible for providing terminal facilities and port services for shipping.

With a view to keeping abreast with the substantial increase of cargo volume in foreign trade, MPA could manage in attracting foreign direct investments for container terminals. Altogether 3 container terminals namely Botataung Street Warf (BSW), Myanmar International Terminal Thilawa (MITT) and Asia World Port Terminal (AWPT) were operational in 1987, November 1996 and May 2001 respectively. Regarding inland container depots, a total of 3 ICDs viz. ICD-1, ICD-2 and MIP were establish and incorporated in July 1996, December 1999 and February 2000. (Please see details in attachment 3, 6 pages)
C. International shipping services available to facilitate trade

As the result of liberalization measures and economic reform programmes especially in trade, investment and banking system, foreign trade immensely induces seaborne shipping. The port statistics show that there has been a steady increase from 1990 to 2001 in carriage of container transport at Port of Yangon. (Please see details in attachment 4)

In addition, thanks to private participation in international shipping and port terminal operations which is accessible for worldwide shipping and trade environs. As container service is growing in leaps and bounds, many Main Line Operators (MLOs) like Maersk, APL, Hanjin, NYK, Cosco. The existing feeder service between Yangon and Singapore is being augmented by connecting massive MLO participation.

D. Future prospects for international shipping services

1. The demand for shipping services is a derived demand

As the main function of ocean shipping is to serve international trade, the growth or decline in international trade will have a direct impact on the future of ocean shipping services.

As regards Myanmar’s foreign trade, it is anticipated that both conventional and container shipping services will continue to play an important role to cater for its demand for shipping services. The state owned Myanmar Five Star Line and foreign shipping lines will be the providers for the said shipping services.

For the development of designated ports of Myanmar, MPA considers the following action plans:

(a) To closely monitor the development of sea-born trade and traffic.

(b) To invite and negotiate in terms of technical know-how and investment from sources inside this country and abroad.

(c) To initiate and develop port commercialization and privatization in sector-wise.

(d) MPA considers reviewing for the simplification and harmonization of port document and procedures, relating to vessels and cargo as part of improving the port performance level.

(e) Regarding the promotion of regional cruise tourism industry has become priority in the Government development projects. In year 2001, 5 cruise vessels called Yangon Port, which is tremendous potential in tourism. In addition, in cooperation with the Asian member countries a working group was formed to make a feasibility study on the development of cruise industry.

(f) MPA is also very interested to cooperate near coastal voyages among the ASEAN countries.

(g) To introduce EDI application in Intermodal/Multimodal transport system.

(h) To take required steps for human resources development of work force.

E. Export/import policies, rules and regulation

Export policy

The main objectives of the export promotion policy are mention as under:

- To export all exportable surplus and diversify foreign market by using of natural and human resources.
- To increase and diversify exports.
- To improve the quality of export products.
Import policy

- With a view to reduce the trade deficit and to facilitate the settlement for imports, an “Export first and Import later” system was allowed in late 1997.
- Import of capital goods, industrial machineries, raw materials and other essential items are allowed.
- Import of certain items which can be domestically produced such as biscuits, fresh fruits, noodles are restricted in order to encourage domestic production.
- Import of certain non-essential items such as alcohol, cigarettes to protect public health is prohibited.

(Please see details in attachment 5, 2 pages)

F. National (plan/policy) toward liberalization

1. National plan toward liberalization in maritime sector

Myanmar after joining ASEAN, gave indicative offer on Maritime sector to other member countries at “Vessel Salvage and Refloating services”. According to the report of the twenty-first meeting of the Coordinating Committee on Services (CCS), it stated that the meeting recommended parameters such as short term (1999-2001) and long term (2002-2020) to give further liberalization for trade in services.

The 23rd meeting of CCS clarified on the targets to be achieved especially on common services sub-sectors, other services sub-sectors, improvement of commitments for both modes 1 and 2 to “none” and progressive improvement of commitments of both modes 3 and 4.

In ASEAN, senior members’ are well established and they are in a position to compete with the dominant players in the world. Some countries are now making alliances with the others to provide better services. Also new ASEAN members like ourselves need institutional upgrading, prescribing laws and regulations and adopting/preparation so as to sustain growth and development, compete fairly and proper protection.

Myanmar also the improvement of commitments relating to short term and long term parameters.

(Please see details in attachment 6)

G. Myanmar’s participation status in WTO


In this manner, Myanmar had shown its active participation in every WTO Ministerial Conference.

The Union of Myanmar is not only founder member of General Agreement in Tariffs and Trade (GATT), but also the member of the first group of signatories for WTO. During the Uruguay Round, Myanmar had given the commitments for the market access in tourism under the Service Sector. Although Myanmar hasn’t yet submitted the proposal to the Services Negotiations, held in Geneva since year 2000, Myanmar has been continually updated regarding the progress of these negotiations through Myanmar Mission in Geneva. Myanmar has also participated in the AESAN Geneva Committee and always agreed in principle for most of the WTO issues with the ASEAN stand.

In this regard, Myanmar Delegation led by H.E Brig-Gen Pyi Sone, Minister for Commerce attended the Fourth WTO Ministerial Conference held in Doha, Qatar in November 2001. The leader of Myanmar Delegation delivered the statement of the Union of Myanmar at the second day of the Conference. Minister’s statement highlighted the following points:
"The benefits of the multilateral trading system however have not been felt evenly. A review of the world economic situation shows that many developing countries could not reap the benefits of the economic growth and prosperity of the world economy during the last five decades."

"The principles of reciprocity and mutual advantage which underscore the WTO system mean that a weak economy may not automatically receive the full benefits of the system."

"There is, therefore, an urgent need to assist developing countries, especially for developing countries to integrate into the global economy to ensure a balanced distribution of the benefits of the multilateral trading system."

"Trade is a key engine for growth. However, the products of developing countries face many obstacles in entering the markets of rich countries.

"It is also true that open market can play an important role in lifting millions of people out of absolute poverty. Although the developing countries have achieved a certain measure of success, there is still a long way to go for these countries to fully benefit from the world trading system. A lot of more need to be done, both by the developing countries and the international community."

In conclusion, Myanmar as a member of the United Nations is working in cooperation with specialized UN agencies such as International Monetary Fund (IMF), World Bank, General Agreement on Tariffs and Trade (GATT), World Trade Organization (WTO), International Maritime Organization (IMO), United Nations Conference on Trade and Development (UNCTAD) in trade and shipping matters.

After Myanmar became, a full-fledged member of ASEAN on 23 July 1997, Myanmar has played an active part in ASEAN’s regional and international affairs including foreign trade. After Myanmar’s subsequent entry into BIMST-EC, an economic group of South-East Asian countries and South Asian countries on 22 December 1997, Myanmar is striving hard to achieve economic co-operations among member countries.

Being one of the first countries in GATT and WTO member country, Myanmar has been carrying out its economic activities in accordance with the norms and the system of WTO.
ANNEXES

Attachment 1

Total Foreign Investment of Permitted Enterprises by Sector from 1995 to 2002

[Graph showing the total foreign investment by sector from 1995 to 2002, with peaks in mining, manufacturing, and real estate development.]
<table>
<thead>
<tr>
<th>Name</th>
<th>Year Built</th>
<th>Country</th>
<th>DWT</th>
<th>TEU Capacity</th>
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<td><strong>Ocean-Going Cargo Vessels</strong></td>
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<td>Multi-Purpose Vessels</td>
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<td>China</td>
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<td>382</td>
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<td>11,654</td>
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<td>Germany</td>
<td>13,055</td>
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<tr>
<td>4. Magway</td>
<td>1985</td>
<td>Germany</td>
<td>13,055</td>
<td>383</td>
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<td>1963</td>
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<td>10,720</td>
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<tr>
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<td>1963</td>
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<tr>
<td>3. Mergui</td>
<td>1963</td>
<td>Japan</td>
<td>10,075</td>
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<tr>
<td>4. Pinya</td>
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<td><strong>Short Sea Trade Cargo Vessels</strong></td>
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<td></td>
</tr>
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<td>1. Chin Shwe Haw</td>
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<tr>
<td>2. Mongla</td>
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<td>Norway</td>
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<td>–</td>
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<tr>
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<td><strong>Coastal Cargo Vessels</strong></td>
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<tr>
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<td></td>
</tr>
<tr>
<td>1. Loikaw</td>
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<td>790</td>
<td>–</td>
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<tr>
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<td>1975</td>
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<td>700</td>
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<tr>
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<td>Germany</td>
<td>1,720</td>
<td>–</td>
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<tr>
<td>5. Shweli</td>
<td>1970</td>
<td>Japan</td>
<td>1,305</td>
<td>–</td>
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<td><strong>Coastal Passenger-Cargo Vessels</strong></td>
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<tr>
<td>1. Hakha</td>
<td>1979</td>
<td>Norway</td>
<td>948</td>
<td>–</td>
</tr>
<tr>
<td>2. Myitkyina</td>
<td>1979</td>
<td>Norway</td>
<td>948</td>
<td>–</td>
</tr>
<tr>
<td>3. Taunggyi</td>
<td>1979</td>
<td>Norway</td>
<td>948</td>
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</tr>
<tr>
<td>* Passenger Capacity ~ 315 Persons</td>
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</tr>
<tr>
<td><strong>Coastal Passenger Vessels</strong></td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>1. Thanlwin</td>
<td>1999</td>
<td>China</td>
<td>592</td>
<td>440</td>
</tr>
<tr>
<td>2. Chindwin</td>
<td>1999</td>
<td>China</td>
<td>592</td>
<td>428</td>
</tr>
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<td><strong>Total tonnage</strong></td>
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<td></td>
<td></td>
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<tr>
<td><strong>Total number of vessels</strong></td>
<td></td>
<td></td>
<td></td>
<td>26</td>
</tr>
</tbody>
</table>
Botataung Street Warf

B.S.W is the first container terminal here in Yangon and owned by Myanmar Port Authority (Government organization) and it is also fully controlled by the Myanmar Port Authority and located in downtown area.

Address: Myanmar Port Authority
Botataung Bridge, Container Yard
STRAND ROAD, YANGON, MYANMAR

<table>
<thead>
<tr>
<th>B.S.W (1)</th>
<th>Length 150 m</th>
</tr>
</thead>
<tbody>
<tr>
<td>B.S.W (2)</td>
<td>Length 150 m</td>
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<tr>
<td>B.S.W (3)</td>
<td>Length 150 m</td>
</tr>
<tr>
<td>Draft</td>
<td>9.3 m</td>
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</tbody>
</table>

Container Freight Station (CFS)
- Length: 243 Feet
- Width: 197 Feet
- Total Area: 47,871 sq. ft
- Storage area: 22,400 sq. ft
- Storage capacity: 2,867 tons

Container Yard (CY)
- Area: 284,675 sq. ft
- Laden container storage area: 104,328 sq. ft
- Laden container storage capacity: 1,818 TEU
- Empty container storage area: 78,720 sq. ft
- Empty container storage capacity: 750 TEU

Equipment
- Quay Crane (30 tons and 35 tons): 2 units
- 40’ Spreader (32 tons and 35 tons): 2 units
- 20’ Spreader (25 tons): 1 unit
- Transtainers (35 tons and 40 tons): 4 units
- Reach stacker (36 tons): 2 units
- Komatsu forklift (36 tons): 1 unit
- Forklift for CFS (3 tons): 4 units

Myanmar International Terminal Thilawa

M.I.T.T is Myanmar’s purpose build International multi-purpose container port. Hutchison Port Holding (HPH) which developed the facilities is managing MITT with over three years experience in Myanmar to date. Nowadays, cargo trade to Myanmar is provided by feeder service. With the operation of MITT, HPH is planning to develop intra-Asia service for Myanmar.

Located at Thilawa, close to the mouth of the Ayeyarwady river Delta – the nation’s rice bowl, MITT is strategically positioned to answer that call. MITT is just 25 kilometres or 40 minutes drive from downtown, Yangon, the nation’s capital.

Address: Berth 5-9 Thilawa, Kyauktan Township, Yangon, Myanmar.
Tel: 095 056 22250, 22252
Fax: 095 056 25253, 22254, 44446
E-mail: mitt@mptmail.net.mm
**Berths capacities**

- No of Berths for General Cargo Vessel and Berth Length: 4 (550 m)
- Can handle a million TEUs per annum
- No of Berth for Container Vessel and Berth Length: 2 (450 m)
- (MP is adjustable accordingly)
- Berth Width (GC and Container): 30 m
- Alongside draft (declared): 10 m

**Storage capacity**

- General Cargo Shed: 20,000 m²
- Container Stacking allowed
  - Import: 3 high
  - Export: 3 high
  - RF point: 108 points

- Others
  - Thaketa off-dock (500 teus)

**Equipment**

- 1 QC (with auto spreader): 2 units (ZPMC)
  - Under spreader: 40 mt
  - Without spreader: 48 mt
  - Out reach: 30 m
- RTGCs: 3 nos (ZPMC)
- Reach stacker (Front loader): 2 units (40 T, Kalmar)
- Empty Handler/FL Ts: 1 unit (Kalmar)
- Tractors (Prime Mover): 6 units (Kalmar)
- Trailers 20’: 3 units
- Trailers 40’: 3 units (Mafi), (Low)
- Trailers 40’: 2 units (High)
- CFS Forklifts 3.0 T: 5 units (Diesel)
- CFS Forklifts 6.0 T: 2 units

**Asia World Port Terminal**

The Asia World Port Terminal (AWPT) is located upstream of the Yangon River, about 32 kilometres inland from Elephant Point on the Gulf of Martaban.

The facilities of AWPT may be deemed as part and parcel of the overall facilities of the port of Yangon.

The Terminal facilities of AWPT lie right in the heart of Yangon City, within 15 minutes drive to City Hall and 30 minutes drive to Mingalardon International Airport, just outside the downtown area so free from congestion especially in rush hours.

The AWPT is well developed, managed and operated by Asia World Port Management Co., Ltd. a subsidiary of Asia World Co., Ltd. which a well-diversified conglomerate is owned by Myanmar Citizens.

**Address:** Ahlene Township, Yangon, Myanmar.
**Tel:** (951) 210601, 210747, 211561, 229844, 212913, 212914, 212915
**Fax:** (951) 210598
**E-mail:** awpm@mptmail.net.mm
**Berths capacities**

- **No. 1 Wharf:**
  - Length: 198 metres
  - Apron width: 30.5 metres

- **No. 2 Wharf:**
  - Length: 156 metres
  - Apron width: 19.5 metres
  - Draft: 9.2 metres

- The water depth alongside the wharf-head of both wharves is designed at 10 metres below datum in order that the largest available vessel entering the Yangon River can be accommodated at AWPT.

**Turning area**

- A turning area with a minimum width 330 metres is provided down stream of No. 2 wharf in the Yangon River in order to facilitate safe and speedy movements of the vessels incoming or outgoing from AWPT wharves.

**Area and storage capacity**

- Total inland area: 14.75 acres
- Groupage shed: 28,800 square feet
- Laden Containers: 2,009 TEUs
- Reefer Container: 96 TEUs
- Empty Containers: 720 TEUs

**Equipment**

- Mobile harbour crane (Liebherr)
- model 320 with lifting capacity of 104 tons: 1 unit
- Reach Stackers (Kalmar)
- model DRD 420-60 S5 with stacking capacity of 5 tiers: 3 units
- Empty Handlers (Kalmar)
- Model DCE 70-45 E8 with stacking capacity of 8 tiers: 2 units
- Terminal Tractors: 10 units
- Terminal trailers for 20’ Containers: 10 units
- Terminal trailers for 40’ Containers: 10 units
- 3 tons Diesel Forklift: 2 units
- 2.5 tons battery forklift: 2 units
- 60 tons weight bridge with computerized control: 1 unit

**Inland Container Depot (2)**

**Area and storage capacity**

- Total yard area: 4 ACRES
- Storage capacity: (1,800 TEUs)

**Equipment**

- Forklift (2 High) 8 tons: 2 units
- Forklift (3 High) 8 tons: 2 units
**Myanmar**

**Inland Container Depot (1)**

With the objective of operating an Inland Container Depot and the provision of other related services, MPA-ALLIED YANGON INLAND CONTAINER DEPOT LTD was incorporated on 9 April 1996, after signing of a Joint-venture and Shareholders’ Agreement between Myanmar Port Authority and Allied Container Services Pte. Ltd. on 13 December 1995. The Agreement shall be in force for 15 years from the date of signing.

The constructed yard which has a storage capacity of about 5,000 TEUs is located just 1 kilometre away from MPA’s Container Terminal and thus MPA-Allied enjoys the advantages of being in the vicinity of Yangon downtown.

**Address:** MPA-ALLIED YANGON INLAND CONTAINER DEPOT LTD.  
Botataung Zay Street, Seikkan Township, Yangon, Myanmar.  
Tel: 95 1 290178, 290204, 291939  
Fax: 95 1 296540  
E-mail: mpaallied@mptmail.net.mm

**Area and storage capacity**

- Total yard area: 39,963 sq. m.
- Storage Capacity: 5,000 TEUs
- Warehouse: 5 units
- Total Floor area: 1,500 sq. m.

**Equipment**

- Kalmar Reach stacker: 1 unit  
  (41 tons/5 high)
- Kalmar Reach stackers: 2 units  
  (8 tons/7 high)
- Forklifts (7 tons): 2 units
- Forklift (3 tons): 1 unit
- Prime Movers: 3 units
- Skeletal Trailers (40’): 3 units
- Skeletal Trailers (20’): 3 units
- Reefer Points: 10 units

**Myanmar Industrial Port**

MIP was incorporated since 19th February 2000

**Address:** No 7/2B, Strand Road, Ahlone Township, Myanmar.  
Tel: 221204, 221418, 221414, 221416, 221417  
Fax: 221201, 221418  
E-mail: MIPCL@mptmail.net.mm

**Areas and storage capacities**

- 19 acres
- Container storage and wharf
- Included CFS warehouses, JETTY
- Storage Capacities: 7,200 TEUs
- C.F.S WAREHOUSE:  
  - 140 ft x 210 ft: 1 unit  
  - 100 ft x 50 ft: 5 units
**Equipment**

- Forklifts (10 tons) 1 unit
- Forklifts (6 tons) 4 units
- Forklifts (5 tons) 1 unit
- Forklifts (3.5 tons) 1 unit
- Crane (60 tons) 1 unit
- PGS empty (5 high) 1 unit
- Empty (3 high) 1 unit
- Reefer points 25 units
- Prime Movers (40/20 trailers) 3 units
Yangon Port Container Throughput (TEU)

<table>
<thead>
<tr>
<th>Year</th>
<th>BSW</th>
<th>MITT</th>
<th>AWPT</th>
<th>Total</th>
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Export Policy
- To export all exportable surplus and diversify foreign market by using of natural and human resources;
- Increasing and diversifying exports; and
- Improving the quality of products are among the main objectives of the export promotion.

Major Export Items
- Rice
- Pulses and beans
- Maize
- Sesame seeds
- Rubber
- Prawn
- Fish
- Jade
- Teak
- Hardwood
- Plywood and veneer
- Garment
- Sugar
- Copper
- Natural gas
- Base metal and ore

Export Value from 1995 to 2002

[Bar chart showing export value from 1995 to 2002]
**Myanmar**

**Import Policy**
- Export first and import later system is launched since late 1997 to reduce the trade deficit and to facilitate the settlement for imports.
- Allow to import capital goods, industrial machineries, raw materials and other essential items.
- Restricted the imports which can be domestically produced such as biscuits, fresh fruits, noodles.
- Prohibited to import certain non-essential items such as alcohol, cigarettes to protect public health.

**Major Import Items**
- Power tiller
- Fertilizers
- Diesel oil
- Water pump
- Machinery
- Cement
- Electrical apparatus
- Edible oils
- Yarn and fabric
- Hand tractor
- Pesticides
- Hybrid quality seeds
- Hydraulic excavator
- Dumper, loader and parts
- MS rods and mild steel
- Transport equipment
- Pharmaceutical products
- Plastic seeds

**Import Value from 1995 to 2002**

![Import Value Chart](chart.png)
### Myanmar – Initial Indicative Offer in ASEAN Framework Agreement in Services

**Modes of supply:** (1) Cross-border supply (2) Consumption abroad (3) Commercial presence (4) Presence of natural persons

<table>
<thead>
<tr>
<th>Sector</th>
<th>Limitation of Market Access</th>
<th>Limitation on National Treatment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Maritime Transport</strong></td>
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<td></td>
</tr>
<tr>
<td>International passenger</td>
<td>Cross-border supply</td>
<td>None</td>
</tr>
<tr>
<td>Transportation less</td>
<td>Consumption abroad</td>
<td>None</td>
</tr>
<tr>
<td>Cabotage (CPC 7211)</td>
<td>Commercial presence</td>
<td>Unbound</td>
</tr>
<tr>
<td></td>
<td>Presence of natural persons</td>
<td>Unbound</td>
</tr>
<tr>
<td>International freight</td>
<td>Cross-border supply</td>
<td>None</td>
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<tr>
<td>Transportation less</td>
<td>Consumption abroad</td>
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<td>Cabotage (CPC 7212)</td>
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<td></td>
<td>Presence of natural persons</td>
<td>Unbound</td>
</tr>
</tbody>
</table>

**Note:**

1. No additional commitments.
2. The above mentioned offers are indicative tentative offers for negotiation purposes; and Myanmar reserves the right to modify or amend or correct or withdraw the whole or in part at any time.