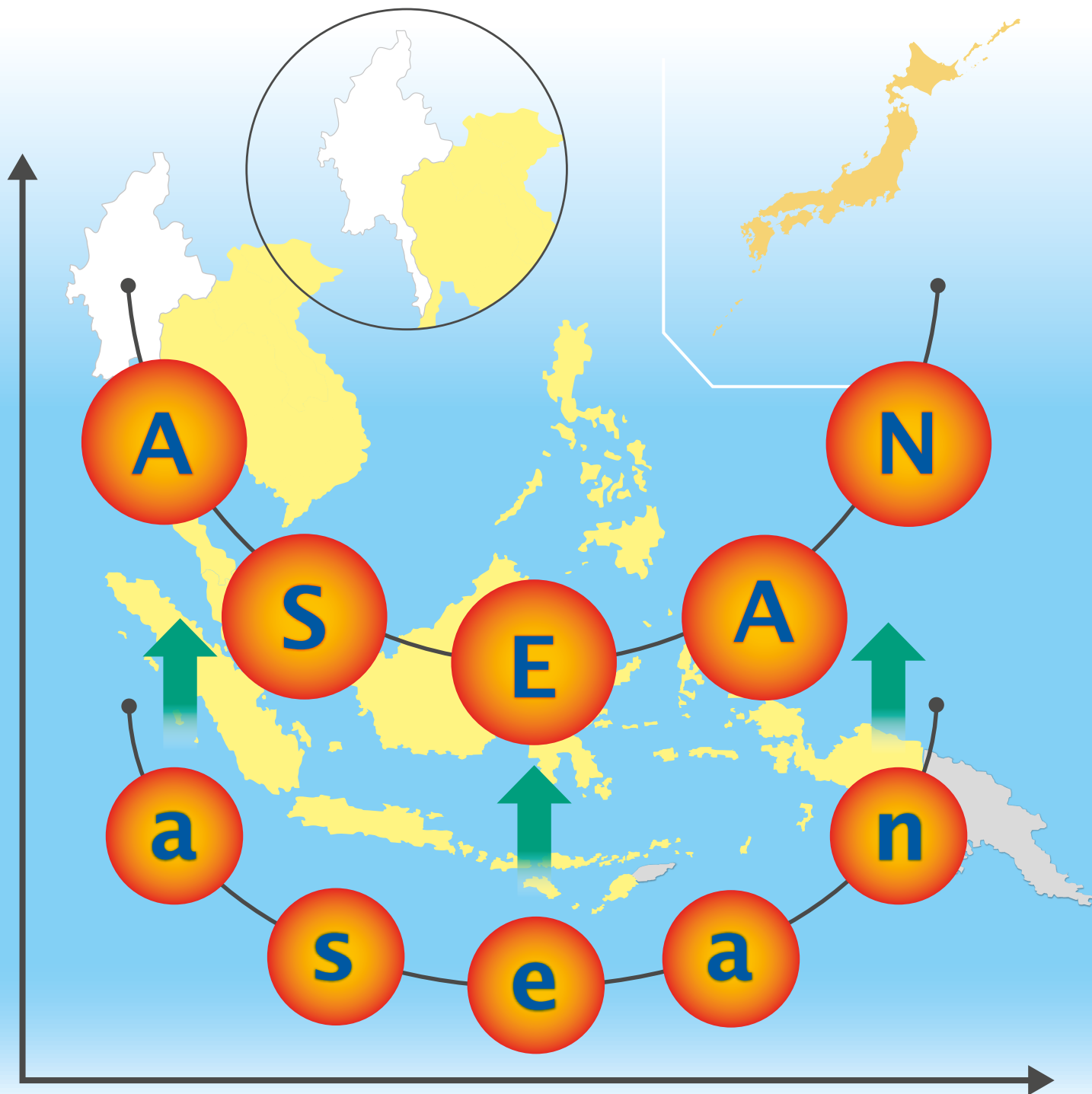


# Global Value Chains in ASEAN

## Myanmar

PAPER 7  
FEBRUARY  
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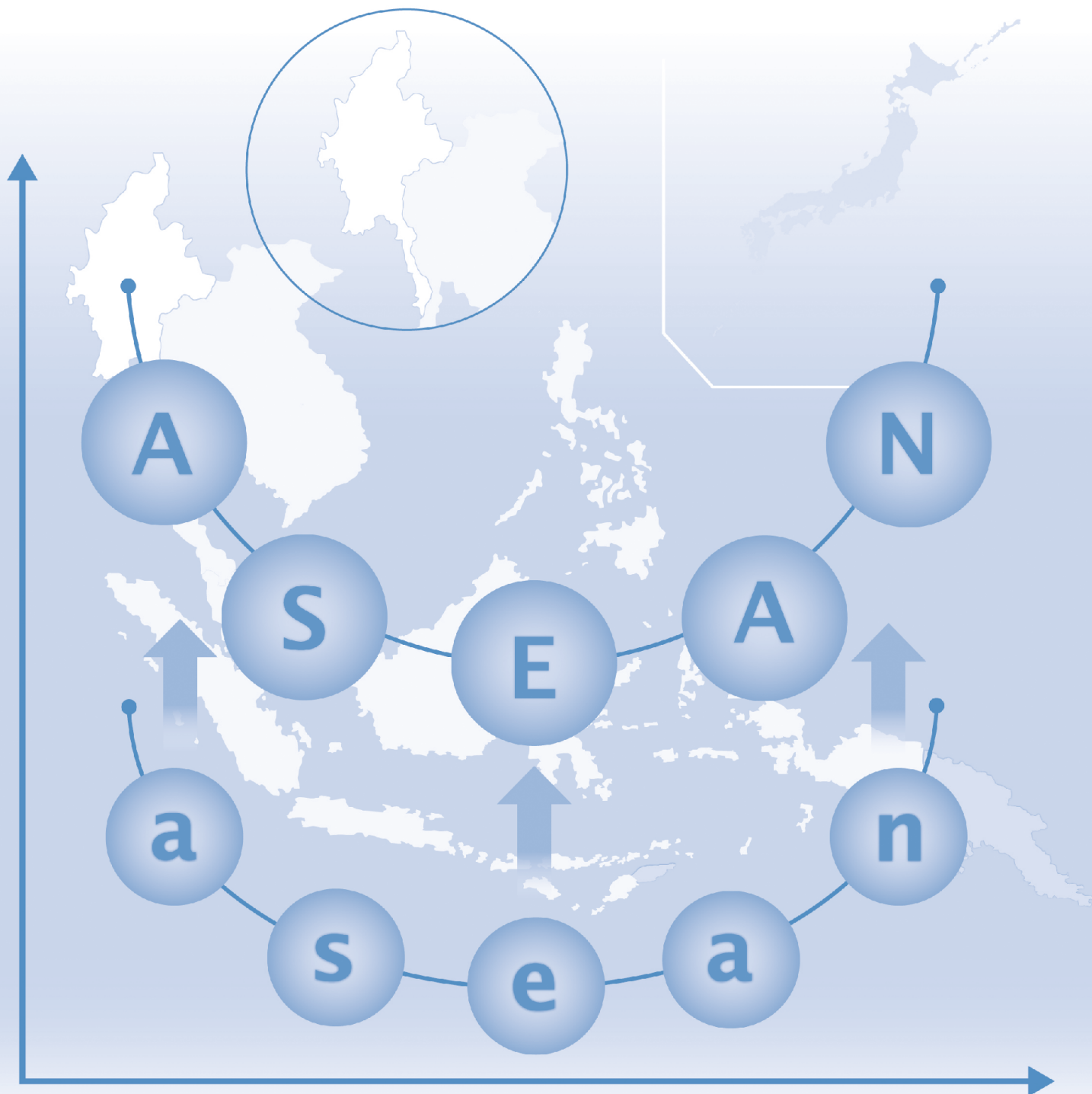
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## NOTES

The terms “country” and “economy” as used in this study also refer, as appropriate, to territories or areas. The designations employed and the presentation of the material do not imply the expression of any opinion whatsoever on the part of the ASEAN-Japan Centre concerning the legal status of any country, territory, city, or area or of the authorities, or delimitations of frontiers or boundaries.

The following symbols have been used in the tables:

- Two dots (..) indicate that data are not available or are not separately reported.
- A dash (–) indicates that the item is equal to zero or its value is negligible.
- Use of a dash (–) between dates representing years, e.g., 2015–2016, signifies the full period involved, including the beginning and end years.
- Reference to “dollars” (\$) means United States dollars, unless otherwise indicated.

### **List of papers under the project on global value chains in ASEAN by the ASEAN-Japan Centre**

The current paper is the 7th of a series of 16 papers on ASEAN GVCs. The other 15 papers have been published or are forthcoming.

Paper 1. A Regional Perspective (first published in September 2017; revised in January 2019)

Paper 2. Brunei Darussalam (published in February 2018)

Paper 3. Cambodia (published in March 2019)

Paper 4. Indonesia

Paper 5. Lao People’s Democratic Republic

Paper 6. Malaysia

#### **Paper 7. Myanmar**

Paper 8. Philippines (published in July 2017)

Paper 9. Singapore (published in August 2018)

Paper 10. Thailand (published in March 2019)

Paper 11. Viet Nam (published in May 2020)

Paper 12. Automobiles (published in January 2020)

Paper 13. Electronics

Paper 14. Textiles and clothing (published in March 2020)

Paper 15. Agribusiness (published in March 2020)

Paper 16. Tourism (published in March 2018)

Prepared by Masataka Fujita (ASEAN-Japan Centre) with input from Toshihiro Kudo (National Graduate Institute for Policy Studies, Tokyo) and Ni Lar Myint Htoo (Yangon University of Economics). The authors wish to thank staff members of the AJC for their comments. The manuscript was edited by Lise Lingo and typeset by Laurence Duchemin. Errors and omissions are those of the authors alone and should not be attributed to their respective organization.

## KEY MESSAGES

- The country has a choice of development path for the economy: to become part of global value chains (GVCs) or to remain locked in low-value production.
- The small value created in trade is demonstrated by data on value added exports.
- The low value added in the economy represents its low integration into the global economy, which is caused partly by low foreign direct investment (FDI) and partly by its economic history.
- The agriculture, forestry and fisheries industry has almost no presence in GVCs but has potential for creating value chains.
- The garment industry should be involved in GVCs in order to compete globally. Being an important industry but generating small value added, the industry faces problems that can be resolved only by participating in GVCs.
- Myanmar should make every effort to implement the general policy framework for GVCs proposed by the ASEAN-Japan Centre (AJC), which consists of five elements. This is not an easy task. Among other challenges, Myanmar must develop all kinds of industrial infrastructure, and electricity in particular. Infrastructure development is a prerequisite for participating in GVCs. The government should play a major role in such development.
- In addition to implementing the general policy framework, Myanmar has to do more to create GVCs and participate in them, taking into account that its economic structure depends on the primary sector.
- The country should focus first on regional value chains and then on global ones.
- As a member of ASEAN, Myanmar should exploit the benefits of free trade agreements (FTAs) that ASEAN has concluded. At the same time, it should make efforts to launch and proactively negotiate FTAs with its important partners, or participate in regional or interregional FTAs such as the Regional Comprehensive Economic Partnership Agreement (RCEP) concluded in late 2020.



Among ASEAN member states, Myanmar has the least information available enabling us to discuss global value chains (GVCs) and making use of value added trade data that is the basis for discussion on GVCs. The history of GVCs has barely started in Myanmar. Although there has been some remarkable growth of foreign direct investment (FDI) and trade recently, these volumes are still too small to create sizable GVCs. Moreover, the industries that conduct business outside the country (e.g. gas, agriculture) are not those that encourage the creation of GVCs. Only the apparel industry has some potential to develop value chains, but at the moment the relationship between local apparel producers and foreign buyers involves only processing trade.

Drafting of this paper was thus bound by many difficulties. Like other papers in this series (box 1), it draws on estimated data on value added exports from 1990, but the use of such data is limited. In addition, GVC data for Myanmar are very few. As in other country studies of this series, the annex contains a complete set of tables on GVCs (annex tables 1-4) but because of the small numbers, small changes cause large-scale reconfigurations of value added trade patterns. Thus, readers are advised to read this paper with great caution.

#### Box 1. GVC work undertaken by the ASEAN-Japan Centre

This paper is part of a multiyear and first-phase research effort, producing annual value chain data for individual member countries of ASEAN and analytical papers based on these data. The first year (FY2016) generated basic data sets for ASEAN as a group and for individual member states, which are updated regularly and used in the present paper. In the following years (FY2017–FY2020), 11 papers were produced – six country papers on Brunei Darussalam (Paper 2), the Philippines (Paper 8), Singapore (Paper 9), Cambodia (Paper 3), Thailand (Paper 10), and Viet Nam (Paper 11), as well as four industry papers on tourism (Paper 16), automobiles (Paper 12), agribusiness (Paper 15), and textiles and clothing (Paper 14), and a regional paper (Paper 1). The AJC will continue to produce evidence-based, policy-oriented technical papers while maintaining and updating the GVC database.

This work also reinforces the Centre's technical cooperation programme in trade and investment by identifying sectors to target for promotional activities in terms of value chains. It assesses the size and significance of economic partnerships between ASEAN and Japan through GVCs in different sectors, in part to identify sectors for which the Centre should make more promotional efforts and should try to derive synergies between its technical cooperation efforts and its analytical contributions.

#### Output 1: Creation of the database on ASEAN GVCs

On the basis of the UNCTAD-Eora GVC database and additional data construction for ASEAN countries, a unique database on GVCs was established for 10 ASEAN member countries, with a special emphasis on Japan as a partner. Other important partners of ASEAN such as China and the Republic of Korea are included. This database uses data on value added trade derived from the Eora global, multiregional input-output (MRIO) table ([www.worldmrio.com](http://www.worldmrio.com)). The Centre's database is called the AJC-UNCTAD-Eora database on ASEAN GVCs. It has been made public gradually as Eora validates the estimated data on GVCs.

Statistics on value added trade can lead to important policy insights for trade, investment and development. The Centre, as part of new efforts to conduct research and policy analysis, aims to provide analysis of the relevance, impact and patterns of value added trade and GVCs across ASEAN and in member countries. The database is helpful for this purpose.

.../

### Box 1. GVC work undertaken by the ASEAN-Japan Centre (Concluded)

Variables in the database include foreign value added trade, domestic value added trade, value added integrated in other countries' exports and gross exports for 26 industries in Brunei Darussalam and the CLM countries (Cambodia, the Lao People's Democratic Republic and Myanmar), 77 industries in Indonesia and the Philippines, 113 industries in Viet Nam, 154 industries in Singapore, 180 industries in Thailand, 298 industries in Malaysia and 462 industries in Japan, covering initially the period 1990–2013. These data are updated regularly. As of August 2020, the period covering industry data has been updated through 2017. For the bilateral country data, the data have been projected until 2019 by UNCTAD and Eora.

Data are collected and estimated in a systematic manner. For comparability among ASEAN countries, the data are presented in a standardized industry classification in the database using the following five variables (see box 2):

- Foreign value added: FVA
- Domestic value added: DVA
- Value added incorporated in other countries' exports: DVX
- GVC participation: FVA + DVX
- Gross exports (total value added exports): FVA + DVA

#### Output 2: 16 evidence-based, policy-oriented technical reports

In a collaborative effort with the Eora project and UNCTAD, the new database of the Centre has been used and will be used to assess the patterns, development impact and policy implications of value added trade and investment. Under this multiyear programme, 16 evidence-based and policy-oriented technical reports (10 country papers, 5 industry papers and 1 regional paper) are being prepared, of which five remain: electronics (Paper 13), Indonesia (Paper 4), the Lao People's Democratic Republic (Paper 5), Malaysia (Paper 6) and this Myanmar paper (Paper 7).

## The country has a choice of development path for the economy: to become part of GVCs or to remain locked in a low-value production.

Myanmar's economy is based on agriculture and natural resources. As GVCs are typically created and established in manufacturing industries, such as automobiles and electronics, Myanmar is the least involved in GVCs of the ASEAN countries today. This is because the country is still new to the globalized economy and because foreign companies have not shown interest yet in creating value chains in the country, though both the government and the private sector make some effort to be part of the globalizing community and to create an environment conducive to investment that could attract value chain operations.

There is still a long way to go before the country sees the benefits of GVCs in contributing to sustainable development. However, there is an opportunity to better use FDI for economic development and harness it for creating value chains, though the kind of FDI that creates value chains is still lacking. Even in the automobile industry, where many GVCs have already been established in ASEAN, operations in Myanmar remain inwardly focused, engaging in either semi-knockdown or complete knockdown of vehicles – all of which are for domestic use, not for export – and showing no sign of integrated production systems.

In 1988, Myanmar made some dramatic and radical changes on the social, political and economic fronts. Since that time, it has adopted a market-oriented economic system. As democratic reforms



began in 2011, including economic reforms and the lifting of the United States and European Union (EU) sanctions on Myanmar exports, the operating environment for industry improved dramatically. The EU reinstated Myanmar to the Generalized System of Preferences (GSP) in 2013. As a least developed country, Myanmar benefits from the most favourable regime available under the EU's GSP, the Everything But Arms scheme.

Sanctions imposed by the United States were abolished in stages until September 2016, when the United States government announced that all remaining sanctions would be lifted and that Myanmar would be reinstated into the GSP programme. The result, as summarized by the International Centre for Trade and Sustainable Development: "The notion of Myanmar being the last economic frontier, abundant with natural resources and investment opportunities, now dominates the narrative on foreign trade. Indeed, in the last few years, together with Ethiopia, Myanmar has been singled out as the new kid on the block, the 'new hot spot or rising star' among [least developed countries] entering the industrialisation process" (ICTSD 2018, p. iv). Subsequently, the turmoil related to the Rohingya has cast some shadows on the bilateral relationship with the EU and the United States.

### The small value created in trade is demonstrated by data on value added exports.

Myanmar is typical of an economy that produces and exports low-end products: there is a difference between the export value as reported in customs clearance data and the export value that represents the accumulation of value added created for exported products. These two values were not much different until 2000; by the end of 2010s, the customs clearance value was three times greater (table 1).<sup>1</sup> Although the contribution of value added from exports to GDP grew, it remains small – at only 9 per cent of GDP, the lowest among ASEAN member states (AJC 2019, p. 6).

**Table 1. Myanmar's value added exports (gross exports) and exports as reported in customs clearance, 1990–2019 (Millions of dollars)**

Year	Value added exports (gross exports)	Exports in custom clearance
1990	616	477
1995	877	897
2000	1 817	1 961
2005	1 512	3 558
2010	3 642	8 861
2015	5 163	11 137
2016	4 884	11 952
2017	4 934	14 851
2018	5 484	16 683
2019	6 103	18 110

Source: Value added exports from AJC-UNCTAD-Eora database on ASEAN GVCs and exports from Customs Department (Myanmar Statistical Information Center, <https://www.mmsis.gov.mm>).

<sup>1</sup> This difference shrinks somewhat if account is taken of the fact that the export value based on customs clearance data does not include services trade. Value added trade includes exports from all industries, including services.

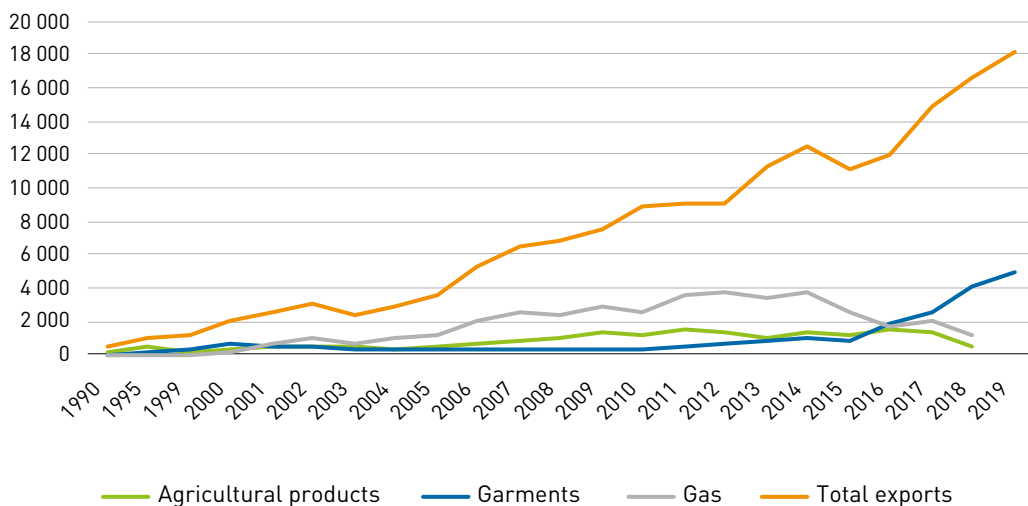
Because of the structure of exports, their value is small. Gas, garments, agricultural products and base metal account for the majority of exports. All are exported either without processing (agricultural products and natural resources) or with only labour-intensive processing (garments). Therefore, in these circumstances it is difficult for the country to export high value added products. Furthermore, exports from the primary sector depend on demand from outside the country and fluctuate with the volatility of international prices of these products.

Customs clearance data show that garments accounted for one quarter and agricultural products accounted for one tenth of total exports recently. The importance of these products in exports has changed over the years. Although the share of agricultural exports is not so large, there was a significant decline of 15–20 per cent in the 1990s and 2000s. Garments have become a major export product since 2015 (figure 1), before which their share of exports stood at less than 10 per cent. The competitiveness of agricultural products has declined as products from neighbouring economies have emerged. Although competitiveness in the garment industry has improved somewhat as foreign companies have entered the country to produce, the industry's competitive root lies only in its low cost. These two industries show different development patterns, reflecting different productive resources and strategies; however, they have a common growth factor: they can develop only through the creation of and participation in GVCs.

The structure of value added exports, though small, also shows the dominance of the primary sector (agriculture and mining) (table 2). The product that creates the largest value added in exports is mining (mainly gas). Gas had been by far the largest export item until 2015. Although its export value per capita was just \$73 in early 2020, according to the Selected Monthly Economic Indicators (February), Myanmar is rich in mineral resources.

In contrast, labour-intensive textile and clothing exports create many jobs for unskilled workers, particularly for women, but do not create much value added, despite having the largest export value. This is because the garment industry does not generate much value, and the materials (textile

**Figure 1. Myanmar exports of agricultural products, garment and gas, 1990–2019**  
(Millions of dollars)



Source: Myanmar Statistical Information Center (from Customs Department), <https://www.mmsis.gov.mm>.

fabrics, yarns) – the large value added component of apparel products – are brought into the country for processing or, if locally made, are of low quality. Thus, value added in apparel was only \$367 million in 2017 (table 2), as compared with an export value of \$2,559 million based on customs clearance data (figure 1). The ratio of value added to total export value in apparel is only 0.14, implying little value creation in the economy. The industry should aim to transform its products to create more value by creating domestic material products (e.g. textiles) and moving into the higher value added part of garment production, beyond CMP (cut, make and package).

**Table 2. Structure of value added exports from Myanmar, by sector/industry, 2017**  
(Millions of dollars and per cent)

Sector/industry	Gross exports	Domestic value added (DVA)	Foreign value added (FVA)	Share of FVA in total gross exports (FVA/total gross exports) (%)
<b>Total</b>	<b>4 934</b>	<b>4 898</b>	<b>36</b>	<b>0.7</b>
<b>PRIMARY</b>	<b>3 608</b>	<b>3 590</b>	<b>18</b>	<b>0.5</b>
Agriculture, hunting, forestry and fishing	1 302	1 297	5	0.4
Mining, quarrying and petroleum	2 306	2 294	13	0.6
<b>SECONDARY</b>	<b>877</b>	<b>865</b>	<b>12</b>	<b>1.4</b>
Food, beverages and tobacco	142	140	1	0.9
Textiles, clothing and leather	367	362	5	1.4
Wood and wood products	240	236	4	1.5
Petroleum, chemical and non-metallic mineral products	21	21	0	1.3
Metal and metal products	19	19	0	1.5
Electrical and general machinery	27	26	0	1.2
Motor vehicles and other transport equipment	10	10	0	1.4
Other manufacturing	37	37	1	1.8
<b>TERTIARY</b>	<b>447</b>	<b>443</b>	<b>4</b>	<b>1.0</b>
Electricity, gas and water	30	30	0	0.5
Construction	17	16	0	0.8
Trade	32	31	0	0.9
Hotels and restaurants	52	51	0	0.8
Transport, storage and communications	173	171	2	1.0
Financial intermediation and business activities	13	13	0	0.1
Public administration and defence	6	6	0	2.1
Education, health and other services	62	62	0	0.4
Community, social and personal service activities	59	58	1	2.0
<b>Other services</b>	<b>4</b>	<b>4</b>	<b>0</b>	<b>2.4</b>

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

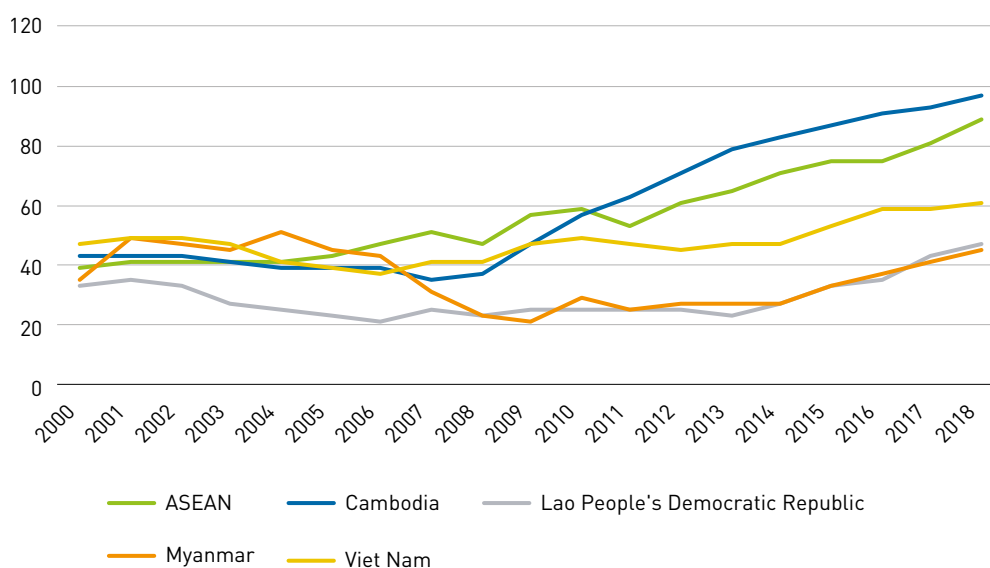
Note: Gross exports refers to the sum of domestic value added and foreign value added. For definitions, see box 2.

### The low level of FDI is associated with the low value added in the economy, ...

The economy is trapped into producing low-end products in an industry that creates low value. The export-oriented apparel industry is market- and buyer-driven, and it requires neither large capital investments nor high technology as long as the activity entails CMP only. Local companies can also enter this industry if given the necessary support from international buyers. By contrast, high-end GVC-oriented products such as those in the electric and electronics industry, long an engine for export growth in emerging economies in South-East Asia, are beyond the capacity of Myanmar companies. For this industry, FDI plays a critically important role; however, there is not much FDI in Myanmar and what there is tends to be oriented to the domestic market. Moreover, even where foreign companies invest in certain industries, they do not contribute much to promoting production networks with other countries – or even with their home countries, in many cases.

The low level of FDI is indicated by the low share of FDI stock in GDP. For the size of its economy, Myanmar receives the least FDI, less than half of what Cambodia receives (figure 2). And the type of investment received does not necessarily create production chains within Myanmar or with other countries. Half of FDI is concentrated in oil and gas (as power industries). As of May 2020, less than 15 per cent of FDI targeted the manufacturing sector, though in the last three years (2017–2019) the sector notched a more than 30 per cent share (figure 3).

Figure 2. FDI stock as percentage of GDP, 2000–2018



Source: UNCTAD, FDI database.

Figure 3. **Approved FDI flows, FY1990–FY2018: total and manufacturing**  
(Millions of dollars)



Source: Directorate of Investment and Company Administration.

**... and that low value added reflects low integration into the global economy, ...**

The low rate of creation of GVCs means that little imported material (e.g. parts and components) is used in exported products. In other words, Myanmar’s exported products are essentially created with the country’s own materials, thus gaining very little value added. In 2019, foreign value added, or the foreign value embodied in Myanmar’s exports (for GVC terminology, see box 2), had a value of only \$42 million and accounted for 1 per cent of gross exports (figure 4). By comparison, in 2018 foreign value added in ASEAN as a whole had a value of as much as \$531 billion and accounted for 36 per cent of gross exports (AJC 2019, p. 6). This small value and share has not changed over the years even after the lifting of economic sanctions. ASEAN contributed the largest amount of foreign value added until recently (2015) but has now been replaced by China.<sup>2</sup> Yet, the value of foreign value added is so small and so variable that no meaningful conclusion can be drawn for Myanmar.

<sup>2</sup> According to the algorithm that is used to estimate value added trade, Tanzania has been a large FVA contributor in recent years; however, as there is no evident connection between Myanmar and Tanzania in terms of GVC, Tanzania is placed out of consideration as an anomaly.

**Box 2. GVC terminology used in the AJC paper series**

A country's exports can be divided into domestically produced value added and imported (foreign) value added that is incorporated into the country's exported goods and services. Furthermore, exports can go to a foreign market either for final consumption or as intermediate inputs to be exported again to third countries (or back to the original country). The analysis of GVCs takes into account both foreign value added in exports (the upstream perspective) and exported value added incorporated in third-country exports (the downstream perspective). The indicators used in this paper as well as the other 15 papers in this series are as follows:

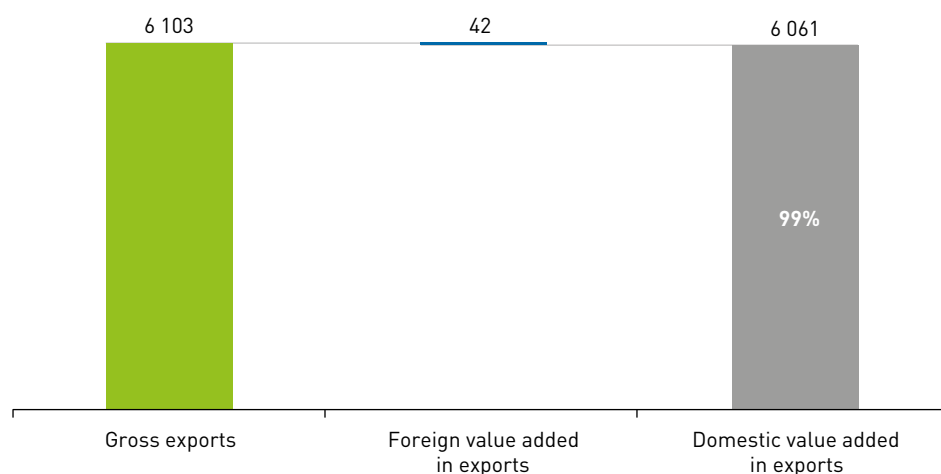
1. **Foreign value added (FVA):** FVA indicates what part of a country's gross exports consists of inputs that have been produced in other countries. The FVA share is the share of the country's exports that do not add to its GDP.
2. **Domestic value added (DVA):** DVA is the part of exports created in-country, i.e. the part of exports that contributes to GDP. The sum of foreign and domestic value added equates to gross exports. DVA can be put in relation to other variables:
  - As a share of GDP, it measures the extent to which trade contributes to the GDP of a country.
  - As a share of global value added trade (the "slice of the value added trade pie"), it can be compared with a country's share in global gross exports (relative value capture from trade).
3. **Value added incorporated in other countries' exports (DVX):** This indicates the extent to which a country's exports are used as inputs to exports from other countries. At the global level, the sum of this value and the sum of FVA are the same.
4. **GVC participation** indicates the share of a country's exports that is part of a multistage trade process, by adding to the FVA used in a country's own exports the value added that is supplied to other countries' exports (FVA + DVX). Although the degree to which exports are used by other countries for further export generation may appear less relevant for policymakers, as it does not change the DVA contribution of trade, the participation rate is a useful indicator for the extent to which a country's exports are integrated in international production networks.

The GVC participation rate corrects a limitation of the FVA and DVA indicators by which countries at the beginning of the value chain (e.g. exporters of raw materials) by definition have a low FVA content of exports. It gives a more complete picture of the involvement of countries in GVCs, both upstream and downstream.

GVC indicators can also be used to assess the extent to which industries rely on internationally integrated production networks. Although a number of complex methods have been devised in the literature to measure GVC length, the degree of double-counting in industries, conceptually, can serve as a rough proxy for the length of GVCs. Data on value added trade by industry can provide useful indications of the comparative advantages and competitiveness of countries, and hence form a basis for development strategies and policies.

Source: Adapted from UNCTAD (2013).

Figure 4. Value added exports from Myanmar, 2019 (Millions of dollars)



Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

However small foreign value added is, because the economy is oriented to natural resources, exported products are likely to be used in creating value chains in other countries. For example, oil and gas as well as other mining products are typical products that constitute part of value chains after exporting, as they may be embodied as energy or raw material elements in the products exported from Myanmar's partner countries along the forward path of GVCs.

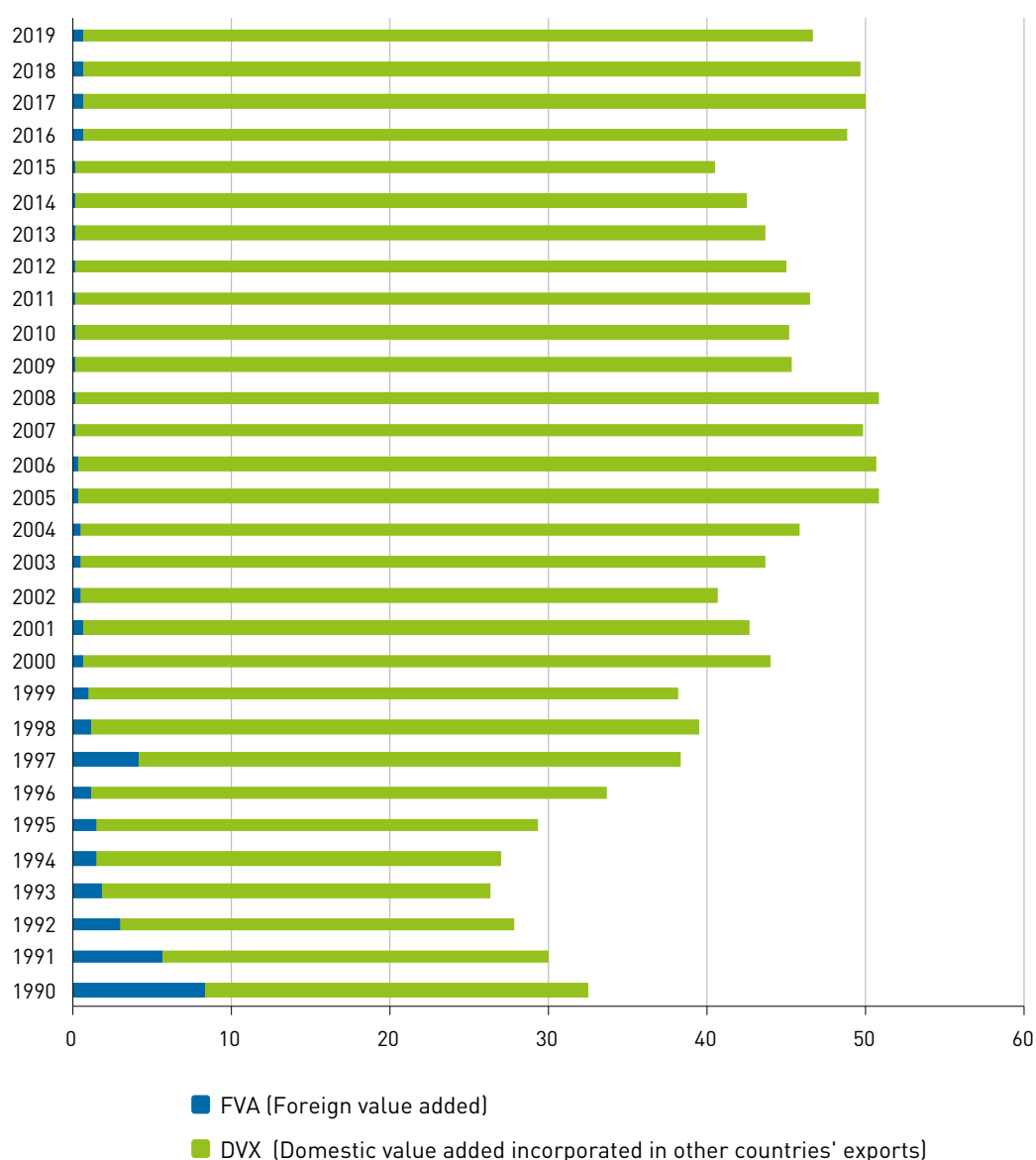
### ... and low integration into the global economy is partly caused by Myanmar's economic history.

In other words, the bulk of participation by Myanmar firms in GVCs consists of value added that is incorporated in other countries' exports (figure 5). Over the 30-year history of Myanmar on how the country has been involved in GVCs, local firms' involvement has been always small. Yet, in the 1990s, the share of FVA (the upstream part of chains) in GVC participation (FVA + DVX) was measurable. In the period until 2001, under the military regime, Myanmar experienced some growth of exports, particularly agricultural products (i.e. seeds) and gems, as well as apparel. These exportable products required some foreign inputs at that time. Since then, however, as the military regime took strong hold, the economy has not received much FDI. It exported only small quantities until 2010 or so when democratization and economic reform started. The recovery of external businesses, which translates into the receipt of foreign products for incorporation into exported products (FVA), began only after the new regime started in 2015 (figure 5).

The highest potential for creating GVCs should be seen in apparel. Yet, even for this industry, foreign value added is small and not much different from that of other industries (figure 6). This may contradict the general observation in other countries where integrating foreign materials (e.g. textiles) into apparel products results in higher foreign value added in gross exports. In Myanmar, imported raw materials are given to local processing companies by foreign buyers or intermediaries

and used for making apparel. Buyers pay only processing fees to local apparel firms, which entails no official transaction for raw materials. Therefore, the exported value in apparel is small, only \$5–6 per metric ton.<sup>3</sup>

Figure 5. **GVC participation in Myanmar, 1990–2019** (Per cent)

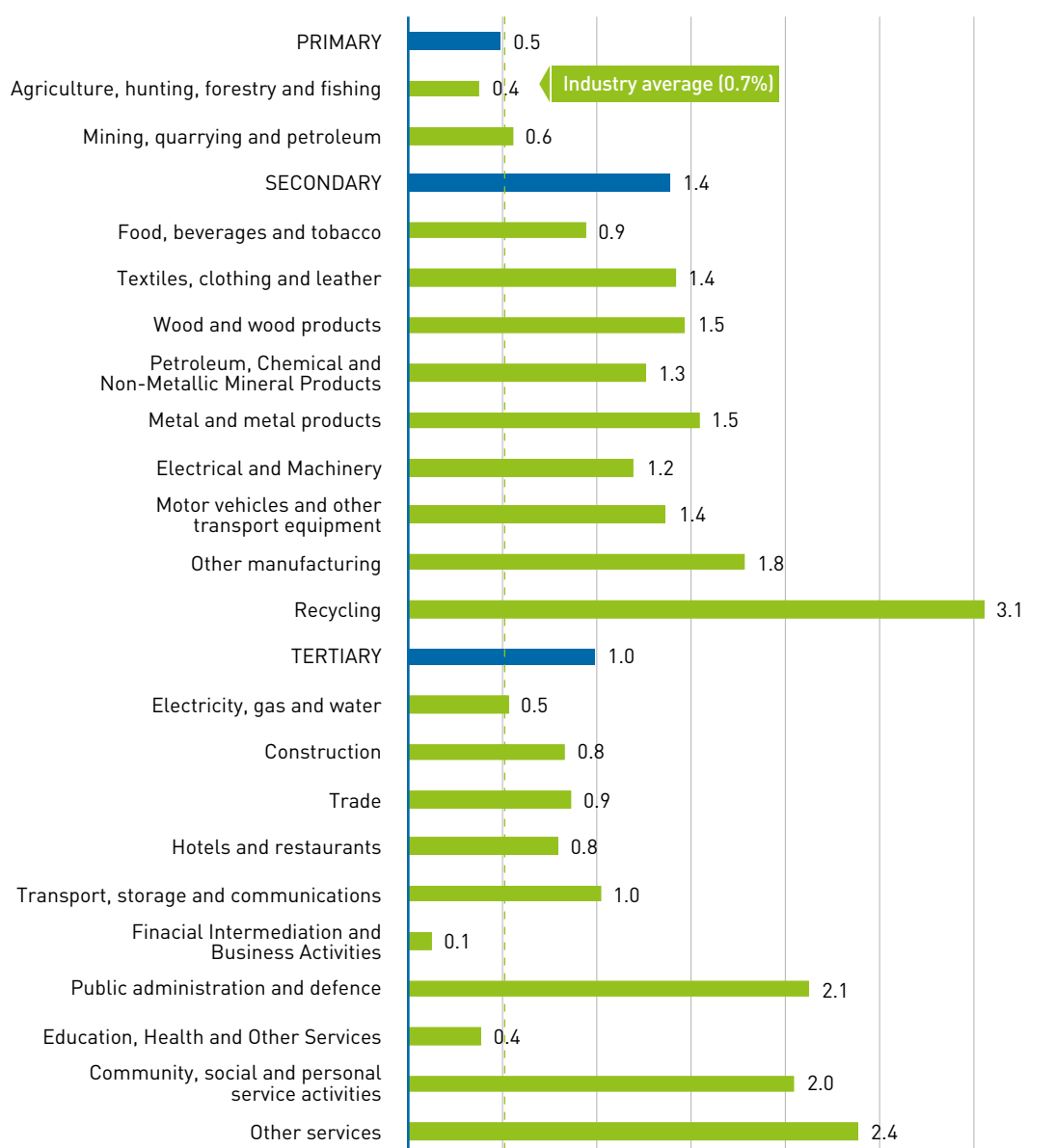


Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

<sup>3</sup> In 2019, Myanmar exported 910,820,000 metric tons of apparel, worth \$4,995 billion (Myanmar Statistical Information Center from Customs Department; <https://www.mmsis.gov.mm>).



Figure 6. Myanmar: Share of foreign value added in exports, by industry, 2017 (Per cent)



Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

As FVA is small, the contribution by other countries is small. China ranks as the largest foreign value added creator for Myanmar's exports, followed by Bangladesh and the United States (table 3). The United States is gradually lifting trade sanctions on Myanmar. Myanmar's trade with the United States is larger than that with European countries such as Germany, the United Kingdom and France.<sup>4</sup> ASEAN as a whole provided only \$2–3 million as inputs to Myanmar's exports, smaller than what one country such as China or the United States provided. This indicates that ASEAN does not yet regard Myanmar as part of its regional or global production networks, even though about half of FDI in Myanmar originates in ASEAN (table 4) – essentially from Singapore, whose investment is mainly in services, not production chains, as well as indirect investment from other countries. Third countries, including Japan, for example, use Singapore as a window for investing in Myanmar, since it has a tax treaty with Myanmar and efficient financial functions. As those figures are small, they do not necessarily indicate the future pattern of involvement of Myanmar firms in GVCs.

**Table 3. Largest foreign value added contributors to Myanmar's exports, 2015–2019**  
(Thousands of dollars)

Rank	Contributing country	2015	2016	2017	2018	2019
1	China	346	3 069	3 110	3 468	3 837
2	Bangladesh	20	649	2 849	3 236	3 587
3	United States	515	3 093	3 031	3 123	3 476
4	India	145	1 056	1 208	1 358	1 511
5	Spain	121	970	946	979	1 080
6	Saudi Arabia	31	852	858	853	972
7	United Kingdom	407	886	865	875	967
8	Viet Nam	48	856	758	849	941
9	Mali	15	119	767	831	921
10	France	103	804	770	783	863
14	Japan	325	585	603	607	669
	<b>ASEAN total</b>	<b>593</b>	<b>2 096</b>	<b>2 350</b>	<b>2 585</b>	<b>2 867</b>

Source: AJC-UNCTAD-Eora GVC database on ASEAN.

<sup>4</sup> Merchandise trade (exports plus imports) with the United States was worth \$1.2 billion in 2019, compared with \$0.9 billion for Germany, \$0.6 billion for the United Kingdom and \$0.4 billion for France (Myanmar Statistical Information Center from Customs Department, <https://www.mmsis.gov.mm>).

Table 4. Approved FDI flows in Myanmar, FY1990–FY2018 and cumulative total as of May 2020 (Millions of dollars)

Source country	FY1990	FY1995	FY2000	FY2005	FY2010	FY2015	FY2016	FY2017	FY2018	Up to May 2020
Total	281	668	218	6 066	19 999	9 481	6 650	5 718	4 158	85 915
ASEAN	102	455	74	6 034	2 449	4 785	5 680	2 309	2 646	39 180
Brunei Darussalam	-	-	-	-	-	26	18	-	-	178
Cambodia	-	-	-	-	-	-	2	-	-	31
Indonesia	-	-	1	-	-	13	9	-	-	275
Malaysia	-	158	10	-	77	257	21	-	-	1 967
Philippines	-	-	-	-	-	-	-	-	-	147
Singapore	5	287	37	-	226	4 247	3 821	2 164	2 410	23 017
Thailand	97	10	26	6 034	2 146	236	423	124	221	11 377
Viet Nam	-	-	-	-	-	5	1 386	21	15	2 188
Lao People's Democratic Republic	-	-	-	-	-	-	-	-	-	1
China	-	0	29	-	8 269	3 324	483	1 395	635	21 327
Hong Kong, China	11	-	13	-	5 798	225	214	252	456	9 667
Japan	60	19	-	-	7	220	60	384	43	1 914
Republic of Korea	3	-	47	-	2 676	128	66	254	89	4 060
United Kingdom	8	160	31	-	799	75	54	211	23	4 904
United States	93	15	-	-	-	3	-	-	-	531

Source: Directorate of Investment and Company Administration.

For further study of GVCs by industry, two industries were chosen: agricultural products and garments.

### The agriculture, forestry and fisheries industry has almost no presence in GVCs but has potential for creating value chains.

In Myanmar, agriculture, forestry and fisheries (statistically combined as one industry) is the second most important industry after manufacturing (21 per cent), accounting for 20 per cent of GDP. Indeed, it was the largest industry until 2016.<sup>5</sup> Seventy per cent of the country's population lives in rural areas and depends on agriculture in one way or another.

Agriculture no longer brings in foreign exchange. Exports of agricultural products, which in Myanmar typically rely on traditional ways of trading instead of large-scale contract farming, have gained no ground over the past decade (though they declined in 2018). Imports of agricultural products had been rising, but they declined in 2017 and 2018 (figure 7). To increase agriculture exports, the country has to not only produce quality products – which are lacking despite the agriculture-intensive economy – but also create value chains that extend to processing food products. Rice and fish products are candidates for creating vertical agribusiness value chains in Myanmar.

Figure 7. **Exports and imports of agricultural products, 1990–2018**  
(Millions of dollars)



Source: Myanmar Statistical Information Service from Customs Department (<https://www.mmsis.gov.mm>).

<sup>5</sup> GDP data from Planning Department, Myanmar Statistical Information Center, <https://www.mmsis.gov.mm>.

In addition to the low quality of agricultural products, major challenges to further development of the sector are its low productivity, its limited capacity, the lack of modernization in agro-processing, and insufficient market diversification. Sizable development in agriculture could be achieved through innovational transformation and value addition, emphasizing appropriate quality management systems, improvement of infrastructure for effective distribution, and smooth transition to food processing for further value creation. Participation in GVCs would be useful to transform the industry and improve productivity, for which the government of Japan, for example, provides technical assistance (box 3).

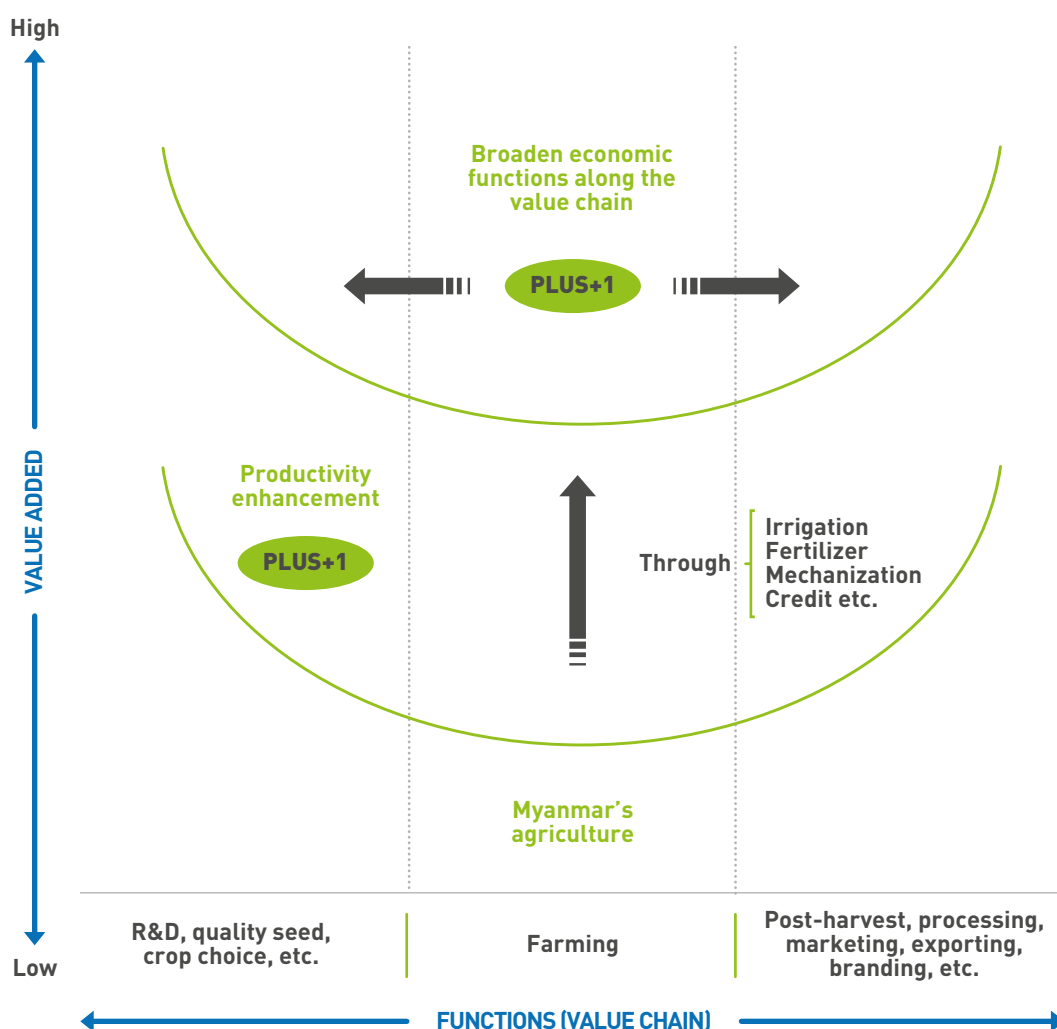
Two directions could be proposed to derive additional value from agriculture: (i) enhancing productivity and (ii) broadening economic functions along the value chain. Kudo et al. calls this the “agriculture plus plus” strategy (figure 8). The first “plus” is to enhance the productivity of each value-chain stage of agriculture, and farming in particular, which is the main agriculture activity. Agriculture in the country suffers from low labour and land productivity caused by an insufficient supply of irrigation, quality seeds, fertilizer, agricultural machines, credits and the like. The key policy issue is how to provide farmers with more physical inputs. The public sector as well as the private sector can play a critical role in this policy arena. The second “plus” is to broaden economic activities from just farming to higher value-adding activities. These include agricultural research and development (R&D), as well as post-harvest businesses such as processing, storing, distribution, marketing, and exporting. In this policy arena, the private sector (including foreign companies) as well as the public sector can play important roles.

### Box 3. Creating an agriculture value chain in Myanmar with Japanese technical cooperation

The first Myanmar–Japan High Level Dialogue on Agriculture, Forestry and Fisheries was held in September 2014 in Nay Pyi Taw, Myanmar. Government officials, experts from relevant organizations and private companies from both countries participated. The dialogue focused on the integrated development of agriculture, forestry and fishery, including the food industry. During the dialogue, representatives of both countries agreed to take concrete measures toward the establishment of an agriculture value chain in Myanmar through cooperation between the public and private sectors.

To establish a food value chain, they agreed to develop a road map in line with the Myanmar Industrial Development Vision created by the government of Japan (Ministry of Economy, Trade and Industry) in 2015 and given to President U Thein Sein by Prime Minister Shinzo Abe on 3 July 2015. The senior officials of both countries exchanged perspectives on the structure and content of the road map. It will be used as a guideline for formulating measures to be undertaken for agriculture and fishery development by the Myanmar government with the assistance of the Japanese government and other development partners, including private sector investment.

Figure 8. “Agriculture Plus Plus” strategy for Myanmar



Source: Kudo et al. 2014, p. 179.

**Rice paddy.** Paddy plays a central role in Myanmar's agricultural production and food consumption. Rice is a staple food for the population of 53 million, consumed by all. Paddy is the most common crop choice for farmers: it is sown on 34 per cent of net sown land and accounts for 43 per cent of the value of agricultural production. Thus, growth in paddy productivity has been directly involved in raising real incomes of the rural poor and reducing poverty.

Paddy is designated as a national crop to highlight its great importance. The Ministry of Agriculture, Livestock and Irrigation has set as its most important target the achievement of a surplus in paddy production so as to meet the requirements of the country. Yet declining production and increasing consumption because of population growth have raised concerns, as they reduce the surplus of paddy that can be exported (table 5). The decline means a loss of the main source of income for the rural population as well as a loss of export earnings.

Under the military regime, the government forced farmers to grow rice in order to secure sufficient rice for the population. Rice exports had long been monopolized by the government, and rice was exported only when a surplus was available after domestic consumption. As a result, the price of rice was contained, and rice had become an unprofitable crop. Farmers tried to avoid paddy production in various ways. This caused a vicious cycle, resulting in stagnant rice production and exports.

Under the liberalization policy of the democratic government, farmers are no longer forced to grow rice. Now, they have the right to choose crops to grow, and they respond to market demands and prices. If rice is profitable, farmers will choose to grow it rather than other crops. If the government wants to enhance rice production and exports, it must work to make rice a profitable crop for farmers by providing support such as irrigation and extension services. Rice is still the most important crop in terms of diet for the population, including the poor. The policy of promoting rice production should be in line with the market mechanism.

**Table 5. Paddy production, consumption and surplus in Myanmar, 2008/2009–2016/2017**  
(Thousand ton)

Fiscal year	Production	Consumption	Surplus
2008/2009	32	16	15
2009/2010	32	17	15
2010/2011	32	17	14
2011/2012	28	14	14
2012/2013	26	14	11
2013/2014	26	14	11
2014/2015	26	15	11
2015/2016	26	15	10
2016/2017	25	15	10

Source: Department of Planning, Ministry of Agriculture, Livestock and Irrigation.

**Fish and aquaculture.** Fish is second only to rice in the Myanmar diet. Fishery is thus considered an important industry, together with agriculture, to fulfill protein requirements and to provide food security. It also provides opportunities for employment to a large number of communities and rural dwellers.

Myanmar is endowed with rich natural resources in both freshwater (aquaculture, leasable and open fisheries) and marine (nearshore and offshore) fisheries, which may be damaged or degraded by growing pressure from industrial and urban development and greater demand for fish and fishery products because of population growth, as well as the impacts of global climate change. Conservation of fishery resources and maintenance of ecosystems are the main factors in the development of sustainable fisheries. Public awareness of the environment is very important: people should be educated about the environment and how overfishing and environmental degradation harm them. This is where foreign technology plays an important role through FDI, part of which creates value chains. Participation in GVCs can improve awareness of conservation and environmental protection of fisheries, as foreign buyers and clients influence fishing methods including by introducing ecological approaches.

All fishery business is carried out by the private sector. Fishery businesses in Myanmar are operated by private entrepreneurs who manage their businesses in accordance with rules and regulations laid

down by the government. Since the opening-up of the economy in 1988, all state-owned infrastructure in the sector, such as fishing vessels, ice plants, processing plants, cold stores, fishmeal plants, and canning plants, has been sold or leased to private companies.

With support from the Department of Fisheries – releasing fish fingerlings, encouraging paddy-cum-fish farming, implementing genetic improvement in rohu (a typical freshwater fish) and culturing more than 20 species of freshwater fishes – fish production has been increasing. Data on fishery products during the past decade show an increase of 1.7 times in production of both freshwater fish and marine fish during 2008/2009 and 2017/2018 (table 6). The shares remained almost constant (46–47 per cent freshwater and 53–54 per cent marine).

Table 6. Fishery production, 2008/2009–2017/2018 (Thousands of metric tons)

Fiscal year	Total	Freshwater fisheries	Marine fisheries
2008/2009	3 542	1 675	1 868
2009/2010	3 922	1 861	2 061
2010/2011	4 163	1 994	2 170
2011/2012	4 478	2 146	2 333
2012/2013	4 716	2 232	2 484
2013/2014	5 047	2 345	2 702
2014/2015	5 317	2 463	2 854
2015/2016	5 592	2 595	2 997
2016/2017	5 675	2 639	3 036
2017/2018	5 877	2 725	3 152

Source: Department of Fisheries.

Note: Includes aquaculture, leasable fisheries and open fisheries.

Although fishery production is on a rising trend, exports have fluctuated over the years (table 7). Nevertheless, the share of exports in total production of fish and fishery products, at 9–10 per cent, did not change between 2008/2009 and 2017/2018. These exports went to 46 countries, with China, Thailand, Singapore, Kuwait, Malaysia, Saudi Arabia, Japan, the United Arab Emirates, Bangladesh and the United Kingdom being the top 10. No specific value chains in fishery exist between these countries and Myanmar, and the exports are arms-length transactions.

In both agriculture and fishery, where value chains can be created, they are expected to play an important role in not only determining trade competitiveness, but also developing sustainable agricultural systems, alleviating poverty and promoting financial inclusion, especially of the rural poor. The agriculture, fishery and forest industry is expected to play an essential role in the country's sustainable development. Many challenges lie ahead.

### The garment industry should be involved in GVCs in order to compete globally.

In its 2015–2020 National Export Strategy, the Myanmar government designated the garment sector as an important engine of growth and job creation. The garment industry is labour-intensive; it has the potential to provide extensive employment opportunities, particularly for women, and help people move out of subsistence agriculture, which still employs 40 per cent of the labour force.



Since the lifting of sanctions in 2013, the industry has been experiencing a renaissance, growing exponentially. Currently, it is the only industry able to connect with global and regional production and distribution networks, and thus the only one that could become part of a GVC.

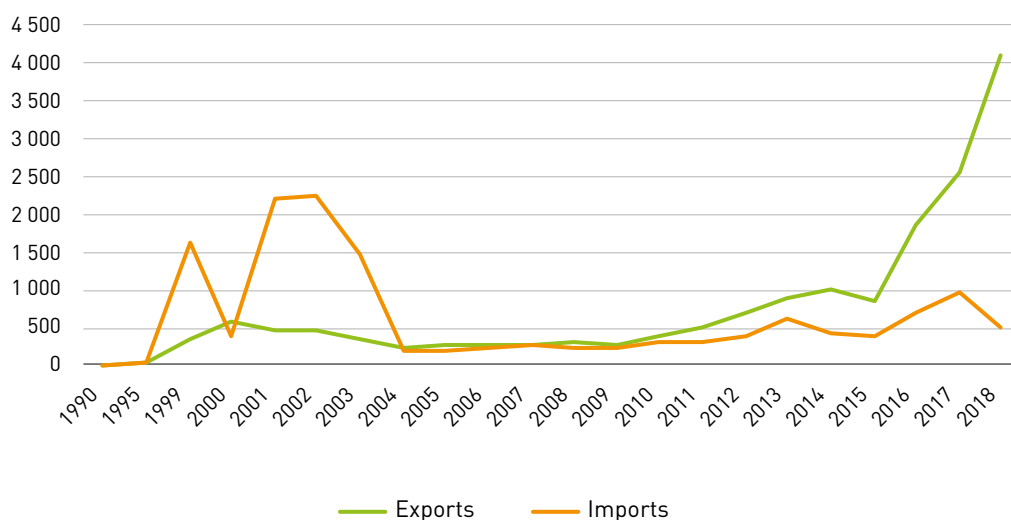
Garment exports accounted for less than 10 per cent of the exports until 2015, after which – following the lifting of sanctions – the share rose to reach one quarter (\$4 billion) in 2018 (figure 9). The Myanmar Garment Manufacturers Association, which was set up with the guidance of the military

**Table 7. Fishery exports, 2008/2009–2017/2018** (Metric tons and millions of dollars)

Fiscal year	Fish		Prawns		Others		Total	
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
2008/2009	234 061	273	18 382	89	72 268	121	324 711	483
2009/2010	277 824	310	17 439	56	79 829	130	375 092	497
2010/2011	273 044	342	19 143	69	81 706	144	373 893	556
2011/2012	283 689	396	17 995	86	85 298	171	386 981	654
2012/2013	266 465	378	17 268	89	93 113	186	376 846	653
2013/2014	237 142	287	16 509	62	91 616	187	345 267	536
2014/2015	225 975	259	17 527	57	94 788	167	338 291	482
2015/2016	246 971	274	13 673	50	108 326	179	368 971	503
2016/2017	290 580	319	13 082	58	135 044	229	438 707	606
2017/2018	394 136	386	15 905	61	158 186	265	568 227	712

Source: Department of Fisheries.

**Figure 9. Exports and imports of textiles and clothing, 1990–2018**  
(Millions of dollars)



Source: Myanmar Statistical Information Service from Customs Department (<https://www.mmsis.gov.mm>).

government in 2002 and now operates under the Ministry of Commerce, played an important role.<sup>6</sup> Despite the rapid growth, however, Myanmar still has a long way to go before exports reach levels comparable to those of Bangladesh (\$27 billion), Viet Nam (\$23 billion in 2015) and Cambodia (\$7 billion in 2016).

The EU is the fastest-growing export market for clothing made in Myanmar and is becoming an increasingly important driver of the industry. Mirror data on imports from Myanmar show that the EU is also the main export destination for garments from the country (table 8). The value of imports from Myanmar into the EU quadrupled between 2011 and 2016 (to \$766 million). Within the EU, Germany and the United Kingdom have historically been the most important markets. The competitive position of Myanmar has improved further with the lifting of the EU's Everything But Arms scheme for Cambodia in 2020. The second most important market is Japan, followed by the Republic of Korea. The United States is not a key destination for Myanmar garment products, having re-opened the market only at the end of 2016. That said, growth rates have been significant and growth expectations heavily rely on fulfilling the potential in the United States market.

Myanmar's textile and garment industry dates back to the years of the Socialist Republic of the Union of Burma (1962–1988).<sup>7</sup> In 1988, the military junta opened the country to foreign investment and the industry grew on the back of a few joint ventures between state-owned and military-related enterprises and firms from both the Republic of Korea and Hong Kong, China. Wholly foreign-owned investments were not allowed until 1995, when the first wholly foreign investor, a global company from Hong Kong, China, established its first plant. At its peak in 2000, the industry generated between 30 and 40 per cent of total exports, compared with 2.5 per cent in 1990. Although it was exporting globally, the two biggest markets were the United States, with 54 per cent of total garment exports, and the EU, with 37 per cent. Despite the increase in FDI flows, domestic firms dominated the industry, accounting for about 90 per cent of total production.

In 2003, the United States imposed an import ban and EU buyers became hesitant to purchase garments made in Myanmar for fear of consumer boycotts, resulting in a dramatic fall in exports. Other factors that contributed to the recession in the industry included the introduction of a 10 per cent export tax and tightening of import controls on raw materials such as fabrics and auxiliary items by the foreign currency-craving military government. The negative cycle was then reinforced by the emergence of fierce competition from Bangladesh and China and difficulties in financing, on the back of the increasing isolation of the country. Only about 130 factories survived the sanctions era, and they supplied mainly Japanese, Korean and Taiwanese buyers. Asian countries, including Japan and the Republic of Korea, did not place any trade sanctions on Myanmar and so became the large markets for its garment industry, replacing the United States. This coincided with Japanese demand shifting from products made in China to those made in South-East Asia (or ASEAN).

Japanese garment affiliates operating in Myanmar were mostly established around or during the period of trade sanctions. For Japanese buyers, Myanmar under sanctions was a good location to place orders, since Myanmar garment firms could not seek orders from other countries. At that time, exacting Japanese buyers had started to be shunned by, for example, Vietnamese garment suppliers, who could easily seek orders from the United States and the EU.

The dominance of Japanese orders had a profound impact on quality control and skills upgrading. Japanese markets required Myanmar garment factories to comply with much stricter quality controls and safety requirements than did United States markets. On the shop floor, Japanese

<sup>6</sup> Information on the development of the apparel industry relies on ICTSD (2018).

<sup>7</sup> For more details, see ICTSD, 2018.

Table 8. Myanmar garment exports by main destinations, 1995–2016 (Millions of dollars)

Key years for Myanmar garment sector <sup>a</sup>	EU-28	Of which:										Total above
		Germany	France	Spain	Italy	United Kingdom	Japan	Republic of Korea	United States	China (including Hong Kong)		
1995	23	7	6	1	0	4	1	0	70	0	94	
2000	278	47	29	11	13	20	5	1	437	2	723	
2001	351	75	42	16	19	39	8	3	437	2	801	
2005	242	82	20	15	11	36	54	7	0	1	304	
2011	185	72	1	41	6	32	347	232	0	11	775	
2016	766	184	66	73	55	96	648	346	80	52	1 892	

Source: ICTSD, 2018, p. 7 based on UN Comtrade, Eurostat; supplemented with import data on main export destinations of the Myanmar garment industry.

Note: Totals differ somewhat from the previous data on garments as these data are for destination.

<sup>a</sup> Years chosen for the following reasons: In 1995 the government allowed fully foreign-owned operations in Myanmar; 2000 and 2001 are the peak years pre-sanctions; 2005 is the trough of the cycle, as sanctions hit; 2011 is the beginning of the new cycle of reforms by the government.

investors and managers taught local employees the importance of product quality and piece-by-piece inspection. At times, they drove changes in the layout of the production process, improving efficiency and effectiveness.

The garment value chain relies on the maintenance of international standards in coordinating the activities of suppliers. Success for manufacturing firms lies in their ability to meet buyers' specifications, as well as buyers' technical, social and environmental standards.

The key actors in Myanmar's participation in a garment industry value chain would be one or more of the following: (1) international lead firms or buyers (in Myanmar these are mostly from the EU, Japan, and the Republic of Korea, and only recently from the United States); (2) transnational agents or "coordinators", which bring importers and local producers to engage in trading businesses; and (3) foreign-affiliated firms in Myanmar engaged in garment production (for Japanese examples, see table 9). Examples of international lead firms or buyers include Famoso Clothing and Manufacture GFT Enterprise (both Japan) and local companies such as Yangon Pan Pacific and A1 Garment that produce for major brands such as GAP (United States), H&M (Sweden) and Uniqlo (Japan). Foreign-affiliated firms include various TNCs in the trading and apparel industries; however, the small export value in Myanmar as compared with neighbouring countries indicates that the number of international firms operating in Myanmar is small. International subcontracting, the mode typically used by these international companies and local subcontractors for international buyers, could be promoted more.<sup>8</sup>

### **Being an important industry but generating small value added, the apparel industry faces problems that can be resolved only by participating in GVCs.**

The small value of garment exports, even though it accounts for a large share of the country's exports, derives from several factors. First, only a limited number of companies engage in apparel making: 480 firms, all members of the Myanmar Garment Manufacturers Association, and only about 300,000 workers, equivalent to 1 per cent of the labour force. Second, these companies engage mainly in CMP operations or the labour-intensive tasks of cutting fabric, sewing garments together and then packing the garments for export. In this is a form of contract work, a foreign buyer pays contracting fees to a garment factory upon receipt of finished products, after providing materials and design specifications. This process shows that although imported materials such as threads, yarns and textiles (\$962 million worth in 2017) are used for both exported apparel products and domestic use and consumption as final products, the value of such imported textiles that is used to produce exported apparel is very small (\$5 million only) (figure 10). Because these foreign materials are brought into the country under subcontracting agreements for processing to turn into final products, their cost is not paid by the contracted firms. This is the reason for the large difference between the export value on a customs clearance basis (\$2.6 billion) and the value added export value created in Myanmar (\$0.4 billion). The former figure includes all the costs of apparel products, including foreign materials that are not necessarily paid out, and the latter refers to only the value created through processing.

Only if Myanmar firms import quality materials from abroad and use them in exported apparel products and only if these firms work at a higher production level than CMP will higher value added be created in the industry. GVCs can facilitate this move or encourage the country to remain trapped in the segment that creates low value added, depending on how foreign companies as GVC users

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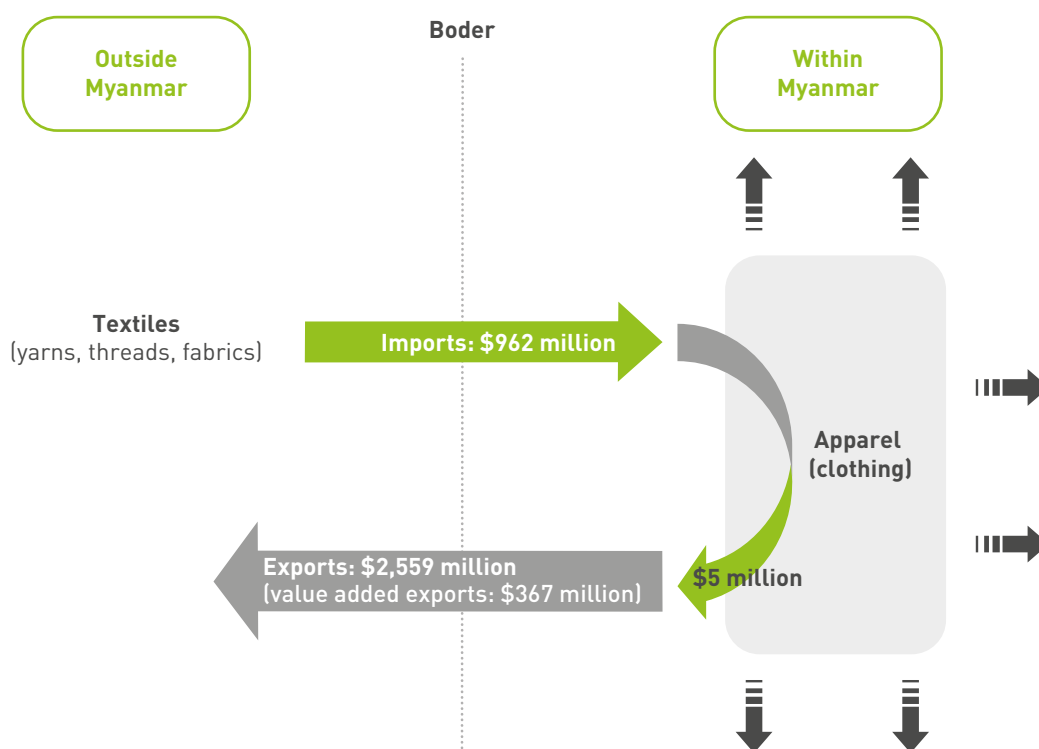
<sup>8</sup> AJC, Non-Equity Modes of Trade in ASEAN: Paper 6 Myanmar, March 2020.

and Myanmar as the host country use GVCs for international production operations. To move into creating higher value added, Myanmar needs to expand the volume of garment exports, which may induce growth in upper and midstream sectors that are more capital- and technology-oriented, and in which they will enjoy economies of scale. Moreover, Myanmar companies should also pay attention to domestic markets. For example, the dying and printing segment needs knowledge of customers' preferences and quick responsiveness to changing fashions. At present, however, as shown by the Myanmar domestic market for printed longyi for women, in which Thai-printed fabrics dominate, there is little room for domestic firms to be involved in segments of the apparel industry that produce greater value. Myanmar companies that understand the domestic markets better should have advantages over foreign companies.

In comparison, in Viet Nam, many export-oriented apparel manufacturers have entered domestic markets by using efficient production technology acquired from their experiences with foreign businesses. Indeed, some Vietnamese apparel firms have successfully broadened their business activities from just sewing to upstream ones such as designing and to downstream ones such as marketing and branding, having created value chains in domestic markets.

Among eight Japanese-affiliated companies operating in the apparel industry in Myanmar, Honeys Garment Industry, Ltd.; White Owl Fashion Co., Ltd.; and Kojima Iryo Myanmar Co., Ltd., aim to use or build international production networks, according to the Toyo Keizai database on Japanese multinationals (table 9). These companies tend to create GVCs if the environment is conducive to value chain transactions.

Figure 10. Myanmar trade pattern of textiles and clothing in 2017



Source: AJC.

Table 9. Japanese-affiliated companies in apparel industry in Myanmar

Name of affiliate	Business	Year of establishment	Name of Japanese parent company	Capital invested (\$ million)	Number of employees (number of Japanese expatriates)	Japanese capital share
TI Garment Co., Ltd.	Men's and women's shirts	2002	Ito-Chu			
Honeys Garment Industry Ltd.	Honeys brand products	2012	Honeys Holding	22	3 722(4)	100
Pattaya Myanmar Co., Ltd. <sup>a</sup>	Women's underwear	2013	Wacoal	0.8	113(0)	20
White Owl Fashion Co., Ltd.	Dress shirts	2012	Flex Japan	2.7	947(3)	100
Kojima Iryo Myanmar Co., Ltd.	Apparel	2014	Kojima Iryo	..	850 (..)	100
Myanmar-Wacoal Co., Ltd.	Wacoal brand products	2016	Wacoal	4	259 (1)	60
Suitstar Garment Co., Ltd.	Men's and women's apparel products	..	Nippon Steal Trading Corp.	..	..	..
Myanmar Postarion Co.,Ltd.	Apparel OEM	..	Matsuoka Corporation	1.23	1985 (..)	100

Source: Toyo Keizai database on Japanese multinationals.

<sup>a</sup> A joint venture with Pattaya Manufacturing Co. Ltd. (30%), M.K. Co., Ltd. (15%) and Mantakanok Co., Ltd. (15%).

### **In addition to instituting a general policy framework for GVCs proposed by the ASEAN-Japan Centre, Myanmar should do more to create and participate in GVCs ...**

Myanmar must do more than what other ASEAN member states have to do in establishing and strengthening GVCs and making use of them for sustainable development. Generally speaking, the AJC recommends that ASEAN member states have a general policy framework consisting of five elements:<sup>9</sup>

- Embedding GVCs in overall development strategies and industrial development policies
- Enabling GVC growth by maintaining a conducive trade and investment environment and by putting in place infrastructural prerequisites
- Building productive capacity in local firms
- Mitigating the risks involved in GVC participation, which requires a strong environmental, social and governance framework
- Aligning trade and investment policies, which implies identifying synergies between the two policy areas and in relevant institutions

Although all five elements are important, infrastructure development is the prerequisite for Myanmar to join GVCs. No matter what the government offers foreign companies as favourable incentives, they will not invest without assurance of a sufficient and stable supply of electricity. Indeed, the greatest obstacle to FDI is the lack of infrastructure services: nearly 80 per cent of Japanese firms operating in Myanmar said that this is the most serious problem in the investment environment, making it the worst among ASEAN member states.<sup>10</sup> The government must play the main role in this area.

### **... taking into account its economic structure, which depends on the primary sector, as well as the process leading to the creation of basic value chains.**

As a latecomer to a global economy now characterized by international production networks of TNCs or GVCs, Myanmar should also take into account specific factors related to its economic structure and the process of establishing GVCs.

Value chains emerge only in certain industries, if the general policy framework elements are present. As noted, the agriculture and apparel industries – both of which are considered strategically important industries – have potential to forge GVCs or become part of GVCs created by foreign companies. In agriculture, however, the establishment of GVCs is not easy unless they are vertically linked with upstream industries such as food processing and restaurants. Indeed, compared with agriculture, the food processing industry can create more value chains and may form GVCs with international food companies (AJC, 2020a). Consequently, the food processing industry's foreign value added share in exports from ASEAN is 24 per cent, twice that of agriculture.<sup>11</sup>

Even in the apparel industry, which is more involved in GVCs (29 per cent in terms of FVA share in exports from ASEAN), than the food processing industry, Myanmar is positioned to be far from the ASEAN average in participation. The current way that the apparel industry is involved does not create much value to the economy and has trapped Myanmar firms in the low end of the market. Given that materials account for the bulk of apparel prices and Myanmar firms cannot easily engage in

<sup>9</sup> AJC, Global Value Chains in ASEAN, Paper 1. A Regional Perspective, Revised, January 2019, p. 29.

<sup>10</sup> JETRO, 2019 Survey of Japanese Companies in Asia and Oceania (in Japanese).

<sup>11</sup> JETRO, 2019 Survey of Japanese Companies in Asia and Oceania (in Japanese), p. 13.

research and development, design, marketing or retailing, Myanmar should build its own capacity to produce raw materials such as yarns and fabrics. Local production of materials can add more value to the apparel products that Myanmar exports (AJC, 2020b).

The next factor to consider is how GVCs are established. In the absence of well-established value chains, what Myanmar has to consider is twofold: first, to focus on the industries that tend to create regional value chains rather than global ones; and second, to pay attention to both upstream and downstream parts of value chains.

### The country should focus first on regional value chains.

Myanmar is facing a big and expanding regional market – ASEAN. International production is concentrated in the region, rather than dispersed globally. As shown earlier, what GVC participation exists in Myanmar is mainly along the downstream part (DVX in box 2), rather than the upstream part, which is represented by small amounts of foreign value added (FVA in box 2) (figure 5). This DVX furthermore exists more in the regional market than outside ASEAN (table 10). The DVX share of ASEAN in the world, or the degree to which Myanmar's products are incorporated in exports from ASEAN, was more than half of DVX in the 2000s. In other words, Myanmar's exports through GVCs have been integrated into exports from ASEAN more than into exports outside the region, though in 2019 the non-ASEAN share surpassed the ASEAN share (24.2 per cent vs 21.7 per cent) (table 10).

This fact implies many things for Myanmar's consideration. The country should focus more on the regional market than on the global one, as this brings advantages such as low transport costs and easy access. Export products that tend to be used in other countries' value chains include products from mining, quarrying and petroleum (e.g. gas, precious stones) – another important primary-sector industry for Myanmar, like agriculture. Myanmar products such as gas may be used in various industries in neighbouring countries and in their exports; precious stones may be exported and processed in neighbouring countries to become gems and jewels and re-exported to other countries. Precious stones could increase in value if they were processed locally in Myanmar and exported like agricultural products. In addition, growth poles in the regional gems market are closer to Myanmar than those in the global market. Myanmar firms could thus do both: export raw gems to regional

Table 10. GVC and RVC participation in Myanmar, 1990–2019 (Per cent of total exports)

Year	FVA: Foreign value added			DVX: Domestic value added incorporated in other countries' exports			Value chain participation	
	Total (A) = (B+C)	Created outside ASEAN (B)	Created within ASEAN (C)	Total (D) = (E+F)	Incorporated outside ASEAN (E)	Incorporated within ASEAN (F)	GVC participation (A + D)	RVC participation (C + F)
1990	8.3	7.7	0.6	24.2	15.5	8.7	32.5	9.4
1995	1.4	1.3	0.2	27.9	14.9	13.0	29.3	13.2
2000	0.7	0.6	0.1	43.3	16.0	27.4	44.0	27.5
2005	0.4	0.4	0.0	50.3	18.5	31.8	50.7	31.8
2010	0.2	0.2	0.0	44.9	17.5	27.4	45.1	27.4
2015	0.2	0.1	0.0	40.3	15.5	24.8	40.4	24.8
2019	0.7	0.6	0.0	45.9	24.2	21.7	46.6	21.7

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.



countries for processing as well as process them locally into quality products and then export them. Local processing requires building the capacity of local workers to develop skills in polishing and cutting stones and making jewels.

To participate more in value chains, be they regional and global, Myanmar should exploit the benefits of FTAs that ASEAN has concluded. At the same time, it should make efforts to launch and proactively negotiate FTAs with its important partners, and participate in regional or interregional FTAs such as the Regional Comprehensive Economic Partnership (RCEP) Agreement concluded in late 2020.



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## ANNEXES

Annex table 1. Value added exports of goods and services from Myanmar by value added creator, 1990–2019 (Thousands of dollars)

	Value added creator	Exports from Myanmar						
		1990	1995	2000	2005	2010	2015	2019
Foreign value added (FVA)	<b>World</b>	51 021	12 662	12 470	6 197	6 235	8 322	42 314
	<b>Developed countries</b>	19 351	5 771	5 232	2 748	2 644	3 511	13 563
	<b>Europe</b>	9 694	3 023	2 829	1 579	1 521	2 049	8 434
	European Union	8 601	2 683	2 525	1 409	1 348	1 833	7 494
	France	522	176	154	89	80	103	863
	Germany	1 042	302	269	151	143	160	790
	Italy	519	157	137	81	76	99	539
	Spain	452	147	123	79	74	121	1 080
	United Kingdom	1 701	505	531	277	271	407	967
	Other developed Europe	1 093	340	305	170	173	215	940
	Norway	236	72	71	37	39	46	411
	Switzerland	274	90	69	59	56	82	476
	<b>North America</b>	3 873	1 083	942	456	412	573	3 605
	United States	3 590	1 009	856	411	368	515	3 476
	<b>Other developed countries</b>	5 784	1 665	1 460	713	712	889	1 524
	Australia	1 450	467	408	228	225	306	548
	Japan	3 204	856	705	310	296	325	669
	<b>Developing countries</b>	28 982	6 238	6 506	3 036	3 087	4 141	27 856
	<b>Africa</b>	4 294	1 246	1 273	685	795	1 115	9 036
	Mali	55	21	24	12	14	15	921
	Nigeria	71	20	26	16	16	21	418
	<b>Latin America and the Caribbean</b>	5 006	1 592	1 701	756	827	987	2 480
	Brazil	342	120	120	70	86	108	841
	<b>Asia</b>	19 333	3 266	3 404	1 534	1 382	1 959	16 263
	West Asia	1 413	382	449	248	239	323	2 111
	Saudi Arabia	223	47	45	23	20	31	972
	South, East and South-East Asia	17 920	2 884	2 955	1 287	1 143	1 636	14 152
	East Asia	13 004	1 039	1 026	469	407	625	5 151
	China	922	359	415	209	197	346	3 837
	Hong Kong, China	213	69	73	23	16	25	427
	Republic of Korea	554	123	169	74	76	109	366
	South Asia	1 142	457	511	285	289	417	6 134
Bangladesh	56	23	26	14	14	20	3 587	
India	413	150	187	97	102	145	1 511	
Pakistan	85	29	27	14	15	19	756	
ASEAN	3 774	1 389	1 418	532	447	593	2 867	
Brunei Darussalam	66	23	28	15	14	19	54	
Cambodia	17	19	23	12	12	15	618	
Indonesia	579	228	190	71	68	95	594	
Lao People's Democratic Republic	36	22	25	12	16	21	17	
Malaysia	596	142	217	71	62	81	140	
Philippines	324	126	84	41	42	58	105	
Singapore	787	264	284	93	83	97	144	
Thailand	1 138	481	453	166	118	160	254	
Viet Nam	231	84	114	52	32	48	941	
<b>Oceania</b>	349	134	128	61	83	80	77	
<b>Transition economies</b>	2 688	653	732	413	503	670	894	
<b>Domestic value added (DVA)</b>	564 692	863 872	1 804 431	1 506 126	3 635 700	5 154 638	6 060 977	
<b>Gross exports</b>	615 712	876 534	1 816 901	1 512 323	3 641 935	5 162 960	6 103 291	

Source: AJC-UNCTAD-Eora database on ASEAN GVCs. Data for 2016–2019 are projected by UNCTAD and Eora.

Note: All values are estimated. Regions and countries refer to where the value added is attributed.

For GVC terminology, see box 2.

Annex table 2.1. Value added exports of goods and services from Myanmar, by value added creator, and by sector and industry,

Value added creator	Exports from Myanmar by sector/industry							
	Primary			Manufacturing				
	Total	Agriculture, hunting, forestry and fishing	Mining, quarrying and petroleum	Total	Food, beverages and tobacco	Textiles, clothing and leather	Wood and wood products	Petroleum, chemical and non-metallic mineral products
<b>World</b>	19 124	16 285	2 839	16 476	2 763	5 099	5 338	405
<b>Developed countries</b>	7 223	6 172	1 051	6 208	1 040	1 902	2 007	152
<b>Europe</b>	3 672	3 105	566	3 111	516	973	998	76
European Union	3 243	2 754	489	2 764	459	859	889	68
France	195	167	29	172	28	52	56	5
Germany	386	332	55	346	57	102	114	10
Italy	194	165	29	169	28	53	54	4
Spain	168	145	23	144	25	44	46	3
United Kingdom	641	549	92	549	90	174	176	12
Other developed Europe	429	351	78	347	57	114	108	8
Norway	89	76	13	75	13	24	24	2
Switzerland	103	88	14	89	15	27	29	2
<b>North America</b>	1 423	1 233	190	1 241	210	374	408	30
United States	1 316	1 142	174	1 148	194	346	378	27
<b>Other developed countries</b>	2 129	1 834	295	1 856	314	555	601	46
Australia	540	465	76	464	79	144	147	12
Japan	1 153	1 006	147	1 036	174	296	342	26
<b>Developing countries</b>	10 831	9 260	1 571	9 428	1 586	2 919	3 069	235
<b>Africa</b>	1 713	1 386	327	1 344	221	446	418	29
Mali	23	18	5	17	3	6	5	0
Nigeria	26	22	4	22	4	7	7	0
<b>Latin America and the Caribbean</b>	1 934	1 615	319	1 572	261	510	493	33
Brazil	127	109	18	108	18	34	35	2
<b>Asia</b>	7 043	6 148	896	6 403	1 087	1 925	2 125	171
West Asia	530	449	80	443	74	140	141	10
Saudi Arabia	83	72	11	73	12	23	23	2
South, East and South-East Asia	6 514	5 698	815	5 960	1 013	1 785	1 983	161
East Asia	4 722	4 149	573	4 232	699	1 315	1 382	101
China	332	294	38	326	59	94	106	15
Hong Kong, China	70	61	9	89	11	30	32	3
Korea, Republic of	186	163	22	200	29	71	62	5
South Asia	431	364	66	377	63	115	122	10
Bangladesh	21	18	4	18	3	6	5	0
India	152	132	19	149	26	41	50	5
Pakistan	33	27	5	27	4	9	8	1
ASEAN	1 361	1 185	176	1 351	250	355	479	50
Brunei Darussalam	25	20	5	20	3	7	6	0
Cambodia	7	5	1	5	1	2	2	0
Indonesia	196	171	24	221	32	54	97	6
Lao People's Democratic Republic	14	11	3	11	2	4	3	0
Malaysia	221	189	32	201	36	59	65	7
Philippines	118	103	15	105	19	30	36	2
Singapore	285	250	34	305	56	70	117	13
Thailand	409	360	49	410	88	108	130	20
Viet Nam	86	74	13	73	12	23	23	2
Oceania	141	111	30	109	18	37	33	2
Transition economies	1 070	853	217	840	136	279	262	18
<b>Domestic value added (DVA)</b>	294 089	277 116	16 974	146 817	32 975	29 622	60 264	5 774
<b>Gross exports</b>	313 214	293 401	19 813	163 292	35 737	34 722	65 601	6 178

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

Note: All values are estimated. Regions and countries refer to where the value added is attributed. For GVC terminology, see box 2.

1990 (Thousands of dollars)

## Exports from Myanmar by sector/industry

				Services				
Metal and metal products	Electrical and general machinery	Other manufacturing	Recycling	Total	Trade	Hotels and restaurants	Transport, storage and communications	Community, social and personal service activities
356	184	1 631	576	7 977	454	1 137	2 737	2 534
137	76	621	223	3 045	169	428	1 045	976
67	36	308	115	1 490	82	212	495	490
59	32	274	101	1 326	73	189	441	435
4	3	17	6	82	5	12	29	25
8	6	35	11	167	9	23	59	50
4	2	17	6	81	4	11	28	26
3	1	15	5	70	4	10	23	24
11	6	54	21	261	14	37	85	87
7	3	34	14	163	9	23	53	55
2	1	7	3	36	2	5	12	12
2	1	9	3	43	2	6	15	14
27	14	125	44	611	34	87	208	198
25	13	117	40	567	32	80	193	184
43	27	188	64	944	53	129	343	289
10	5	46	17	221	12	32	73	72
26	19	108	33	552	32	72	214	158
202	100	928	319	4 542	264	653	1 566	1 424
27	12	130	54	635	35	91	205	215
0	0	2	1	8	0	1	3	3
0	0	2	1	11	1	2	3	4
32	13	155	64	749	41	107	239	259
2	1	11	4	52	3	7	17	18
141	74	633	197	3 107	185	448	1 107	933
9	4	44	16	219	12	31	74	72
2	1	7	2	36	2	5	14	11
131	70	588	180	2 888	173	417	1 032	861
91	46	431	135	2 055	120	295	702	653
8	5	29	8	164	10	23	69	37
2	2	7	2	35	2	4	16	8
5	3	18	5	105	8	12	48	24
9	4	37	13	174	10	25	60	54
0	0	2	1	8	0	1	3	3
5	2	15	4	65	4	10	24	17
1	0	3	1	13	1	2	4	4
31	20	120	33	659	44	97	270	154
0	0	2	1	10	1	1	3	3
0	0	1	0	2	0	0	1	1
4	2	20	5	90	6	13	33	26
0	0	1	0	5	0	1	2	2
4	3	19	6	96	6	14	35	27
2	1	10	4	52	3	8	17	17
7	7	26	5	144	9	21	65	26
10	6	35	8	223	17	33	102	41
2	1	7	3	36	2	5	12	12
2	1	10	4	51	3	7	16	17
17	7	81	34	390	21	56	125	133
3 425	2 925	9 883	747	123 782	14 310	19 299	52 253	15 689
3 781	3 109	11 514	1 323	131 759	14 764	20 436	54 989	18 223

Annex table 2.2. Value added exports of goods and services from Myanmar, by value added creator, and by sector and industry,

Value added creator	Exports from Myanmar by sector/industry							
	Primary			Manufacturing				
	Total	Agriculture, hunting, forestry and fishing	Mining, quarrying and petroleum	Total	Food, beverages and tobacco	Textiles, clothing and leather	Wood and wood products	Petroleum, chemical and non-metallic mineral products
<b>World</b>	5 471	3 038	2 434	4 372	393	2 478	853	60
<b>Developed countries</b>	2 476	1 410	1 067	1 952	176	1 093	382	25
<b>Europe</b>	1 323	731	592	1 010	90	573	195	13
European Union	1 165	652	513	900	80	509	174	11
France	76	43	33	61	5	34	12	1
Germany	129	74	55	106	9	58	22	2
Italy	68	38	30	54	5	31	10	1
Spain	62	36	26	49	5	28	10	1
United Kingdom	216	125	92	172	15	98	33	2
Other developed Europe	158	79	78	110	9	64	20	1
Norway	31	18	14	24	2	14	5	0
Switzerland	39	22	16	31	3	17	6	0
<b>North America</b>	450	267	183	370	34	206	74	5
United States	419	249	170	345	32	191	69	4
<b>Other developed countries</b>	703	411	292	572	53	315	113	8
Australia	199	116	83	159	15	90	30	2
Japan	349	213	136	302	28	161	62	4
<b>Developing countries</b>	2 693	1 478	1 215	2 215	199	1 266	433	32
<b>Africa</b>	590	284	307	388	33	229	70	4
Mali	10	5	6	6	1	4	1	0
Nigeria	9	5	4	7	1	4	1	0
<b>Latin America and the Caribbean</b>	717	379	338	511	45	297	95	5
Brazil	51	30	21	40	4	23	8	0
<b>Asia</b>	1 320	786	535	1 276	117	716	260	23
West Asia	166	92	75	125	11	72	24	1
Saudi Arabia	20	11	8	17	1	10	3	0
South, East and South-East Asia	1 154	694	460	1 150	106	644	237	21
East Asia	389	240	149	448	34	273	81	8
China	139	90	49	148	14	83	28	4
Hong Kong, China	25	15	10	32	2	19	7	1
Korea, Republic of	44	28	16	55	4	34	10	1
South Asia	198	111	88	155	14	87	30	2
Bangladesh	11	6	5	8	1	4	1	0
India	62	38	25	57	5	30	12	1
Pakistan	13	7	6	10	1	6	2	0
ASEAN	566	343	223	548	58	284	125	12
Brunei Darussalam	10	5	5	7	1	4	1	0
Cambodia	9	4	5	6	1	3	1	0
Indonesia	89	53	35	92	8	44	27	1
Lao People's Democratic Republic	11	5	6	7	1	4	1	0
Malaysia	61	35	26	53	5	28	11	1
Philippines	52	31	20	43	4	23	9	0
Singapore	110	69	41	110	13	52	28	3
Thailand	189	120	69	203	24	110	41	5
Viet Nam	36	20	16	28	3	16	5	0
<b>Oceania</b>	65	30	35	41	3	24	7	0
<b>Transition economies</b>	302	150	152	205	18	119	39	2
<b>Domestic value added (DVA)</b>	455 518	344 957	110 561	286 621	37 068	137 592	76 664	6 548
<b>Gross exports</b>	460 990	347 995	112 995	290 993	37 461	140 070	77 517	6 608

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

Note: All values are estimated. Regions and countries refer to where the value added is attributed. For GVC terminology, see box 2.



1995 (Thousands of dollars)

## Exports from Myanmar by sector/industry

				Services				
Metal and metal products	Electrical and general machinery	Other manufacturing	Recycling	Total	Trade	Hotels and restaurants	Transport, storage and communications	Community, social and personal service activities
61	60	265	181	922	49	138	348	253
28	29	123	85	423	22	62	156	120
14	13	63	45	211	11	32	75	63
12	12	56	40	189	9	28	67	56
1	1	4	3	13	1	2	5	4
2	2	7	4	23	1	3	9	6
1	1	3	2	11	1	2	4	3
1	1	3	2	11	1	2	4	3
2	2	11	8	35	2	5	12	11
2	1	7	5	22	1	3	8	7
0	0	1	1	5	0	1	2	2
1	1	2	1	7	0	1	2	2
5	5	24	16	81	4	12	30	23
5	5	22	15	76	4	11	28	22
9	11	37	24	131	7	19	51	35
2	2	10	7	33	2	5	12	10
5	8	20	12	75	5	10	32	18
30	29	130	86	457	25	69	177	120
5	4	23	19	78	4	12	27	24
0	0	0	0	1	0	0	0	0
0	0	0	0	1	0	0	0	0
6	5	31	25	105	5	16	36	33
1	0	3	2	8	0	1	3	3
19	21	73	40	266	16	40	112	60
2	1	8	6	27	1	4	10	8
0	0	1	1	4	0	0	2	1
17	19	65	35	239	14	36	103	52
6	7	24	12	86	5	12	38	18
2	3	8	4	32	2	5	14	6
0	1	2	1	6	0	1	3	1
1	1	3	1	13	1	1	7	2
2	2	10	7	32	2	5	12	9
0	0	0	0	2	0	0	1	0
1	1	4	2	11	1	2	4	3
0	0	1	0	2	0	0	1	1
9	10	32	16	121	8	19	53	24
0	0	0	0	1	0	0	1	0
0	0	0	0	1	0	0	0	0
1	1	6	3	18	1	3	7	4
0	0	0	0	1	0	0	0	0
1	1	3	2	12	1	2	5	3
1	0	3	2	10	1	1	3	3
2	3	6	2	25	1	4	12	4
4	4	11	5	47	3	7	22	7
0	0	2	1	6	0	1	2	2
0	0	2	2	8	0	1	3	3
3	2	13	10	42	2	6	14	13
4 640	6 844	13 350	2 444	121 729	12 100	18 983	53 078	15 985
4 700	6 904	13 615	2 625	122 651	12 150	19 120	53 426	16 238

Annex table 2.3. Value added exports of goods and services from Myanmar, by value added creator, and by sector and industry,

Value added creator	Exports from Myanmar by sector/industry							
	Primary			Manufacturing				
	Total	Agriculture, hunting, forestry and fishing	Mining, quarrying and petroleum	Total	Food, beverages and tobacco	Textiles, clothing and leather	Wood and wood products	Petroleum, chemical and non-metallic mineral products
<b>World</b>	5 961	2 741	3 219	4 689	365	2 373	830	59
<b>Developed countries</b>	2 472	1 172	1 300	1 963	152	979	347	12
<b>Europe</b>	1 353	631	722	1 046	80	530	184	23
European Union	1 199	566	633	939	72	474	166	11
France	73	34	39	59	4	29	10	1
Germany	126	59	67	105	8	50	19	1
Italy	65	30	35	52	4	26	9	1
Spain	57	28	29	46	4	23	8	0
United Kingdom	250	120	130	199	15	101	35	2
Other developed Europe	153	65	88	107	8	56	18	1
Norway	34	16	18	26	2	13	5	0
Switzerland	32	15	17	26	2	13	5	0
<b>North America</b>	440	213	227	357	28	177	65	5
United States	399	193	205	325	26	160	59	4
<b>Other developed countries</b>	680	328	352	559	44	272	98	7
Australia	191	94	96	155	13	79	27	2
Japan	321	157	164	280	21	130	50	4
<b>Developing countries</b>	3 118	1 414	1 704	2 472	194	1 261	439	33
<b>Africa</b>	650	268	382	438	33	231	74	4
Mali	13	5	8	8	1	4	1	0
Nigeria	12	6	6	10	1	5	2	0
<b>Latin America and the Caribbean</b>	835	375	460	604	46	314	104	6
Brazil	56	28	28	45	3	23	8	0
<b>Asia</b>	1 566	744	822	1 386	111	694	254	23
West Asia	218	100	118	162	13	84	28	2
Saudi Arabia	21	10	11	17	1	9	3	0
South, East and South-East Asia	1 348	645	703	1 224	99	610	225	22
East Asia	453	216	237	447	31	236	77	8
China	184	92	92	183	14	94	30	5
Hong Kong, China	30	14	16	34	2	18	7	1
Korea, Republic of	73	36	37	72	5	37	13	1
South Asia	244	114	131	193	15	97	34	3
Bangladesh	13	6	7	9	1	5	2	0
India	87	42	45	77	6	37	14	2
Pakistan	13	6	7	10	1	5	2	0
ASEAN	651	316	335	584	53	277	114	11
Brunei Darussalam	14	6	8	10	1	5	2	0
Cambodia	12	5	7	8	1	4	1	0
Indonesia	85	41	44	80	6	39	18	1
Lao People's Democratic Republic	13	5	8	8	1	4	1	0
Malaysia	103	49	55	84	7	41	16	2
Philippines	39	19	20	32	3	15	6	0
Singapore	130	63	67	123	12	54	26	3
Thailand	201	102	99	197	20	93	37	4
Viet Nam	54	26	29	42	3	21	7	0
Oceania	66	27	40	43	3	23	7	0
<b>Transition economies</b>	371	155	215	254	19	133	44	2
<b>Domestic value added (DVA)</b>	1 144 383	396 865	747 518	500 967	49 635	251 247	108 628	9 653
<b>Gross exports</b>	1 150 344	399 606	750 737	505 656	50 001	253 620	109 458	9 712

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

Note: All values are estimated. Regions and countries refer to where the value added is attributed. For GVC terminology, see box 2.

2000 (Thousands of dollars)

## Exports from Myanmar by sector/industry

				Services				
Metal and metal products	Electrical and general machinery	Other manufacturing	Recycling	Total	Trade	Hotels and restaurants	Transport, storage and communications	Community, social and personal service activities
137	146	333	291	759	40	111	307	196
58	65	144	127	322	17	47	126	87
30	30	77	70	169	9	25	65	47
27	28	69	63	152	8	22	58	42
2	2	4	4	9	0	1	4	2
3	5	8	6	17	1	2	7	4
2	2	4	3	8	0	1	3	2
1	1	3	3	8	0	1	3	2
6	5	15	14	32	2	5	12	9
3	3	8	8	17	1	3	6	5
1	1	2	2	4	0	1	2	1
1	1	2	2	4	0	1	2	1
10	11	26	23	59	3	9	24	16
10	11	24	21	54	3	8	22	14
18	23	41	34	93	5	13	38	24
5	4	11	10	25	1	4	9	7
10	16	21	15	48	3	6	21	11
72	76	171	146	397	22	58	165	97
12	9	32	32	69	4	10	26	20
0	0	1	1	1	0	0	0	0
0	0	1	1	2	0	0	1	0
16	13	44	45	97	5	15	36	29
1	1	3	3	7	0	1	3	2
43	53	91	66	223	13	32	101	46
4	4	12	11	27	1	4	11	8
0	0	1	1	3	0	0	1	1
38	49	80	55	196	11	28	91	39
13	20	28	17	68	4	9	33	13
6	9	11	6	27	2	4	13	5
1	2	2	1	5	0	1	2	1
2	3	5	3	15	1	2	8	2
6	5	14	12	30	2	5	12	8
0	0	1	1	2	0	0	1	0
3	3	5	4	11	1	2	5	2
0	0	1	1	2	0	0	1	0
19	24	38	25	98	6	15	46	18
0	0	1	1	2	0	0	1	0
0	0	1	1	1	0	0	0	0
2	3	5	4	12	1	2	5	3
0	0	1	1	1	0	0	0	0
3	3	6	4	15	1	2	7	3
1	1	2	2	5	0	1	2	1
4	8	8	4	21	1	3	10	3
7	8	12	7	34	2	5	17	5
1	1	3	3	7	0	1	3	2
1	1	3	3	7	0	1	3	2
7	5	19	18	40	2	6	15	12
14 854	23 093	23 308	5 310	159 078	13 322	22 132	67 860	18 112
14 991	23 239	23 641	5 601	159 836	13 362	22 243	68 166	18 308

Annex table 2.4. Value added exports of goods and services from Myanmar, by value added creator, and by sector and industry,

Value added creator	Exports from Myanmar by sector/industry							
	Total	Primary		Total	Manufacturing			Petroleum, chemical and non-metallic mineral products
		Agriculture, hunting, forestry and fishing	Mining, quarrying and petroleum		Food, beverages and tobacco	Textiles, clothing and leather	Wood and wood products	
<b>World</b>	3 130	1 344	1 786	1 770	152	952	374	21
<b>Developed countries</b>	1 367	605	762	787	68	423	166	9
<b>Europe</b>	787	346	441	449	38	242	95	5
European Union	699	310	388	403	34	217	85	4
France	44	20	25	26	2	14	5	0
Germany	76	33	43	44	4	23	9	1
Italy	40	18	22	23	2	13	5	0
Spain	39	18	21	23	2	12	5	0
United Kingdom	134	62	71	81	7	44	17	1
Other developed Europe	88	36	53	46	4	25	10	0
Norway	18	8	10	11	1	6	2	0
Switzerland	30	13	18	17	1	9	4	0
<b>North America</b>	227	101	127	131	11	71	28	1
United States	205	91	114	118	10	64	25	1
<b>Other developed countries</b>	352	158	194	206	18	110	43	2
Australia	112	51	61	66	6	35	14	1
Japan	154	69	85	91	8	48	19	1
<b>Developing countries</b>	1 545	654	891	873	75	470	185	11
<b>Africa</b>	358	143	215	184	16	100	38	2
Mali	6	2	4	3	0	2	1	0
Nigeria	8	4	4	5	0	3	1	0
<b>Latin America and the Caribbean</b>	378	165	213	212	18	115	44	2
Brazil	34	15	19	20	2	11	4	0
<b>Asia</b>	778	333	444	461	40	245	99	7
West Asia	124	54	70	70	6	38	15	1
Saudi Arabia	11	5	6	7	1	4	1	0
South, East and South-East Asia	654	279	375	391	34	207	84	6
East Asia	237	101	136	147	12	81	30	2
China	107	46	61	67	6	37	13	1
Hong Kong, China	11	5	6	8	1	4	2	0
Korea, Republic of	36	16	20	23	2	12	5	0
South Asia	144	62	81	82	7	44	17	1
Bangladesh	7	3	4	4	0	2	1	0
India	50	21	29	29	3	15	6	1
Pakistan	7	3	4	4	0	2	1	0
ASEAN	274	116	157	162	15	83	37	3
Brunei Darussalam	8	3	5	4	0	2	1	0
Cambodia	6	2	4	3	0	2	1	0
Indonesia	35	15	20	22	2	11	5	0
Lao People's Democratic Republic	6	3	4	3	0	2	1	0
Malaysia	37	15	21	21	2	11	5	0
Philippines	21	9	12	12	1	6	2	0
Singapore	49	21	29	29	3	14	7	1
Thailand	85	36	49	53	5	27	12	1
Viet Nam	26	11	14	15	1	8	3	0
Oceania	32	13	19	16	1	9	3	0
<b>Transition economies</b>	218	85	133	110	9	59	23	1
<b>Domestic value added (DVA)</b>	1062 927	382 603	680 324	329 101	36 344	157 512	89 768	6 789
<b>Gross exports</b>	1066 057	383 947	682 110	330 870	36 497	158 464	90 143	6 810

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

Note: All values are estimated. Regions and countries refer to where the value added is attributed. For GVC terminology, see box 2.

2005 (Thousands of dollars)

## Exports from Myanmar by sector/industry

				Services				
Metal and metal products	Electrical and general machinery	Other manufacturing	Recycling	Total	Trade	Hotels and restaurants	Transport, storage and communications	Community, social and personal service activities
33	37	108	79	346	17	45	126	105
14	16	49	36	155	8	20	55	48
8	9	28	21	88	4	11	31	28
7	8	25	19	79	4	10	28	25
0	1	2	1	5	0	1	2	2
1	1	3	2	9	0	1	3	3
0	0	1	1	5	0	1	2	1
0	0	1	1	4	0	1	2	1
1	2	5	4	16	1	2	6	5
1	1	3	2	9	0	1	3	3
0	0	1	1	2	0	0	1	1
0	0	1	1	3	0	0	1	1
2	3	8	6	26	1	3	9	8
2	2	7	5	23	1	3	8	7
4	5	13	9	41	2	5	15	12
1	1	4	3	13	1	2	4	4
2	3	6	4	19	1	2	7	5
16	19	52	38	170	8	22	63	50
3	3	11	9	36	2	5	12	12
0	0	0	0	1	0	0	0	0
0	0	0	0	1	0	0	0	0
4	4	13	10	41	2	5	14	13
0	0	1	1	4	0	1	1	1
9	12	27	18	89	5	11	36	24
1	1	4	3	14	1	2	5	4
0	0	0	0	1	0	0	1	0
8	10	22	15	75	4	10	31	19
3	4	8	5	28	1	3	12	7
1	2	4	2	12	1	2	5	3
0	0	0	0	1	0	0	1	0
0	1	1	1	5	0	1	2	1
2	2	5	4	16	1	2	6	5
0	0	0	0	1	0	0	0	0
1	1	2	1	5	0	1	2	1
0	0	0	0	1	0	0	0	0
3	5	9	6	32	2	4	13	8
0	0	0	0	1	0	0	0	0
0	0	0	0	1	0	0	0	0
0	0	1	1	4	0	1	2	1
0	0	0	0	1	0	0	0	0
0	1	1	1	4	0	1	2	1
0	0	1	1	2	0	0	1	1
1	1	2	1	6	0	1	3	1
1	2	3	2	11	1	1	5	2
0	0	1	1	3	0	0	1	1
0	0	1	1	3	0	0	1	1
2	2	7	5	21	1	3	7	7
6 714	12 358	13 809	3 092	114 095	10 342	15 471	52 998	14 327
6 747	12 396	13 917	3 171	114 441	10 359	15 516	53 124	14 432

Annex table 2.5. Value added exports of goods and services from Myanmar, by value added creator, and by sector and industry,

Value added creator	Exports from Myanmar by sector/industry							
	Primary							Manufacturing
	Total	Agriculture, hunting, forestry and fishing	Mining, quarrying and petroleum	Total	Food, beverages and tobacco	Textiles, clothing and leather	Wood and wood products	Petroleum, chemical and non-metallic mineral products
<b>World</b>	3 181	1 407	1 774	1 410	137	745	319	16
<b>Developed countries</b>	1 343	598	745	596	58	316	134	7
<b>Europe</b>	772	344	428	343	33	182	77	4
European Union	683	305	378	304	29	161	69	3
France	41	18	23	18	2	10	4	0
Germany	73	32	41	32	3	17	7	0
Italy	38	17	21	17	2	9	4	0
Spain	37	17	20	17	2	9	4	0
United Kingdom	137	61	75	61	6	32	14	1
Other developed Europe	88	39	50	39	4	20	9	0
Norway	20	9	11	9	1	5	2	0
Switzerland	29	12	17	12	1	6	3	0
<b>North America</b>	211	92	118	92	9	49	21	1
United States	189	83	106	82	8	44	19	1
<b>Other developed countries</b>	361	162	199	161	16	85	36	2
Australia	114	51	63	51	5	27	11	1
Japan	150	67	83	67	7	35	15	1
<b>Developing countries</b>	1 576	698	879	704	69	371	160	8
<b>Africa</b>	405	179	227	178	17	95	40	2
Mali	7	3	4	3	0	2	1	0
Nigeria	8	4	5	4	0	2	1	0
<b>Latin America and the Caribbean</b>	418	187	231	186	18	99	42	2
Brazil	44	20	24	19	2	10	4	0
<b>Asia</b>	711	313	398	321	31	167	74	4
West Asia	121	54	67	54	5	29	12	1
Saudi Arabia	10	5	6	5	0	2	1	0
South, East and South-East Asia	590	258	331	267	26	139	62	4
East Asia	209	92	118	97	9	51	22	1
China	103	44	59	48	4	25	11	1
Hong Kong, China	8	4	5	4	0	2	1	0
Korea, Republic of	38	17	21	18	2	9	4	0
South Asia	149	65	83	66	6	34	15	1
Bangladesh	7	3	4	3	0	2	1	0
India	53	23	30	24	2	12	6	0
Pakistan	8	3	4	4	0	2	1	0
ASEAN	232	101	130	105	11	53	25	2
Brunei Darussalam	7	3	4	3	0	2	1	0
Cambodia	6	3	3	3	0	1	1	0
Indonesia	35	15	20	16	2	8	4	0
Lao People's Democratic Republic	8	4	4	4	0	2	1	0
Malaysia	32	14	18	14	1	7	3	0
Philippines	22	9	12	9	1	5	2	0
Singapore	44	19	25	20	2	10	5	0
Thailand	61	27	35	29	3	15	7	0
Viet Nam	16	7	9	7	1	4	2	0
Oceania	42	19	23	19	2	10	4	0
<b>Transition economies</b>	261	111	150	110	11	59	25	1
<b>Domestic value added (DVA)</b>	2 712 041	1 119 536	1 592 505	664 790	85 259	285 156	203 830	15 317
<b>Gross exports</b>	2 715 221	1 120 943	1 594 279	666 201	85 396	285 901	204 149	15 333

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

Note: All values are estimated. Regions and countries refer to where the value added is attributed. For GVC terminology, see box 2.

2010 (Thousands of dollars)

## Exports from Myanmar by sector/industry

				Services				
Metal and metal products	Electrical and general machinery	Other manufacturing	Recycling	Total	Trade	Hotels and restaurants	Transport, storage and communications	Community, social and personal service activities
27	20	80	57	299	14	38	105	104
11	9	34	24	127	6	16	44	44
6	5	20	14	73	3	9	25	26
6	4	17	12	64	3	8	22	23
0	0	1	1	4	0	0	1	1
1	1	2	1	7	0	1	2	2
0	0	1	1	4	0	0	1	1
0	0	1	1	4	0	0	1	1
1	1	4	2	13	1	2	4	5
1	1	2	2	8	0	1	3	3
0	0	1	0	2	0	0	1	1
0	0	1	0	3	0	0	1	1
2	1	5	4	20	1	2	7	7
2	1	5	3	18	1	2	6	6
3	2	9	7	34	2	4	12	12
1	1	3	2	11	0	1	4	4
1	1	4	3	15	1	2	5	5
13	10	40	28	149	7	19	53	51
3	2	10	7	38	2	5	13	13
0	0	0	0	1	0	0	0	0
0	0	0	0	1	0	0	0	0
3	2	11	8	39	2	5	13	14
0	0	1	1	4	0	1	1	1
6	5	18	12	68	3	9	25	22
1	1	3	2	11	1	1	4	4
0	0	0	0	1	0	0	0	0
5	5	15	10	57	3	7	21	18
2	2	5	4	20	1	3	8	6
1	1	2	2	10	0	1	4	3
0	0	0	0	1	0	0	0	0
0	0	1	1	4	0	0	2	1
1	1	4	3	14	1	2	5	5
0	0	0	0	1	0	0	0	0
1	0	1	1	5	0	1	2	2
0	0	0	0	1	0	0	0	0
2	2	6	4	23	1	3	9	7
0	0	0	0	1	0	0	0	0
0	0	0	0	1	0	0	0	0
0	0	1	1	3	0	0	1	1
0	0	0	0	1	0	0	0	0
0	0	1	1	4	0	1	2	1
1	1	2	1	6	0	1	3	2
0	0	0	0	2	0	0	1	1
0	0	1	1	4	0	1	1	1
2	1	6	5	23	1	3	8	8
15 225	20 297	27 899	6 279	255 919	22 288	34 050	120 784	32 821
15 251	20 318	27 980	6 335	256 218	22 302	34 088	120 889	32 925

Annex table 2.6. Value added exports of goods and services from Myanmar, by value added creator, and by sector and industry,

Value added creator	Exports from Myanmar by sector/industry							
	Primary							Manufacturing
	Total	Agriculture, hunting, forestry and fishing	Mining, quarrying and petroleum	Total	Food, beverages and tobacco	Textiles, clothing and leather	Wood and wood products	Petroleum, chemical and non-metallic mineral products
<b>World</b>	3 505	1 533	1 972	1 573	163	820	363	18
<b>Developed countries</b>	1 447	634	813	656	68	343	151	7
<b>Europe</b>	857	379	478	384	40	201	88	4
European Union	764	339	425	344	36	180	79	4
France	42	18	24	19	2	10	4	0
Germany	65	28	37	30	3	16	7	0
Italy	42	19	23	19	2	10	4	0
Spain	51	23	28	23	2	12	5	0
United Kingdom	164	73	91	76	8	40	17	1
Other developed Europe	93	40	53	40	4	21	9	0
Norway	19	9	11	9	1	5	2	0
Switzerland	37	15	22	15	2	8	4	0
<b>North America</b>	226	94	132	106	11	55	24	1
United States	202	83	119	95	9	50	22	1
<b>Other developed countries</b>	364	161	203	166	17	86	38	2
Australia	130	58	72	58	6	30	13	1
Japan	125	54	71	60	6	31	14	1
<b>Developing countries</b>	1 766	775	991	794	83	412	184	10
<b>Africa</b>	475	209	266	209	22	110	48	2
Mali	6	3	4	3	0	1	1	0
Nigeria	9	4	5	4	0	2	1	0
<b>Latin America and the Caribbean</b>	418	186	231	185	19	97	42	2
Brazil	46	20	25	20	2	11	5	0
<b>Asia</b>	839	364	475	385	40	198	90	5
West Asia	137	61	76	61	6	32	14	1
Saudi Arabia	13	6	7	6	1	3	1	0
South, East and South-East Asia	702	303	399	324	34	166	76	5
East Asia	260	111	149	125	12	65	29	2
China	146	60	86	72	7	38	16	1
Hong Kong, China	11	5	6	5	0	3	1	0
Korea, Republic of	46	20	26	22	2	11	5	0
South Asia	180	79	101	80	8	41	19	1
Bangladesh	9	4	5	4	0	2	1	0
India	64	28	37	29	3	14	7	0
Pakistan	8	4	4	4	0	2	1	0
ASEAN	262	114	149	119	13	60	29	2
Brunei Darussalam	8	4	4	4	0	2	1	0
Cambodia	7	3	4	3	0	2	1	0
Indonesia	41	18	23	19	2	9	5	0
Lao People's Democratic Republic	9	4	5	4	0	2	1	0
Malaysia	36	15	20	16	2	8	4	0
Philippines	25	11	14	11	1	6	3	0
Singapore	45	19	26	21	2	10	5	0
Thailand	72	31	41	34	4	17	8	1
Viet Nam	20	9	11	9	1	5	2	0
Oceania	34	15	19	15	2	8	3	0
<b>Transition economies</b>	292	124	168	123	13	65	28	1
<b>Domestic value added (DVA)</b>	3 927 853	1 769 248	2 158 605	889 169	122 620	367 568	279 374	20 805
<b>Gross exports</b>	3 931 358	1 770 781	2 160 577	890 742	122 783	368 387	279 737	20 823

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

Note: All values are estimated. Regions and countries refer to where the value added is attributed. For GVC terminology, see box 2.



2015 (Thousands of dollars)

## Exports from Myanmar by sector/industry

				Services				
Metal and metal products	Electrical and general machinery	Other manufacturing	Recycling	Total	Trade	Hotels and restaurants	Transport, storage and communications	Community, social and personal service activities
31	21	84	62	313	14	41	107	112
13	9	36	27	132	6	17	44	48
8	5	21	15	76	3	10	26	28
7	4	19	14	68	3	9	23	25
0	0	1	1	4	0	0	1	1
1	0	2	1	6	0	1	2	2
0	0	1	1	4	0	0	1	1
0	0	1	1	5	0	1	2	2
1	1	4	3	15	1	2	5	6
1	1	2	2	8	0	1	3	3
0	0	0	0	2	0	0	1	1
0	0	1	1	3	0	0	1	1
2	1	6	4	22	1	3	7	8
2	1	5	4	20	1	2	7	7
3	2	9	7	33	1	4	11	12
1	1	3	2	11	0	1	4	4
1	1	3	2	12	1	2	4	5
16	11	42	31	157	7	20	55	55
4	3	11	8	41	2	5	14	15
0	0	0	0	1	0	0	0	0
0	0	0	0	1	0	0	0	0
4	2	10	7	37	2	5	12	13
0	0	1	1	4	0	1	1	1
8	6	20	14	76	3	10	28	25
1	1	3	2	12	1	2	4	4
0	0	0	0	1	0	0	0	0
7	5	17	12	64	3	8	24	21
3	2	6	4	25	1	3	9	8
2	1	4	3	14	1	2	5	4
0	0	0	0	1	0	0	0	0
1	0	1	1	5	0	1	2	1
2	1	4	3	16	1	2	5	6
0	0	0	0	1	0	0	0	0
1	0	2	1	5	0	1	2	2
0	0	0	0	1	0	0	0	0
3	2	6	4	24	1	3	9	8
0	0	0	0	1	0	0	0	0
0	0	0	0	1	0	0	0	0
0	0	1	1	4	0	0	1	1
0	0	0	0	1	0	0	0	0
0	0	1	1	3	0	0	1	1
0	0	1	0	2	0	0	1	1
0	1	1	1	4	0	1	2	1
1	1	2	1	7	0	1	3	2
0	0	0	0	2	0	0	1	1
0	0	1	1	3	0	0	1	1
2	2	7	5	24	1	3	8	9
21 548	26 533	35 733	7 993	336 829	29 086	45 894	160 158	42 628
21 580	26 554	35 818	8 055	337 142	29 099	45 934	160 265	42 740

Annex table 2.7. Value added exports of goods and services from Myanmar, by value added creator, and by sector and industry,

Value added creator	Exports from Myanmar by sector/industry							
	Primary							Manufacturing
	Total	Agriculture, hunting, forestry and fishing	Mining, quarrying and petroleum	Total	Food, beverages and tobacco	Textiles, clothing and leather	Wood and wood products	Petroleum, chemical and non-metallic mineral products
<b>World</b>	17 734	4 937	12 797	12 189	1 333	5 203	3 526	265
<b>Developed countries</b>	5 861	1 720	4 140	4 164	490	1 564	1 380	113
<b>Europe</b>	3 658	1 071	2 587	2 611	307	979	867	71
European Union	3 247	948	2 299	2 318	272	871	769	63
France	381	114	267	271	33	98	93	8
Germany	351	103	248	246	29	95	79	6
Italy	241	72	169	172	21	63	58	5
Spain	467	141	326	337	40	123	115	10
United Kingdom	426	118	307	303	35	117	98	8
Other developed Europe	411	122	289	293	35	108	98	8
Norway	181	55	127	129	16	46	44	4
Switzerland	208	62	146	148	18	54	50	4
<b>North America</b>	1 558	469	1 089	1 111	134	401	380	32
United States	1 503	453	1 050	1 070	130	385	367	31
<b>Other developed countries</b>	645	181	464	441	48	184	132	10
Australia	224	62	162	161	18	63	52	4
Japan	300	88	211	195	21	85	54	4
<b>Developing countries</b>	11 495	3 110	8 385	7 768	815	3 532	2 068	147
<b>Africa</b>	3 768	1 028	2 740	2 446	236	1 260	528	30
Mali	403	113	290	238	23	126	47	2
Nigeria	175	49	126	130	14	52	42	3
<b>Latin America and the Caribbean</b>	1 089	298	792	791	88	318	247	19
Brazil	367	111	257	269	32	100	91	8
<b>Asia</b>	6 607	1 778	4 829	4 507	489	1 941	1 288	97
West Asia	924	276	648	661	79	241	224	19
Saudi Arabia	427	129	297	304	37	108	105	9
South, East and South-East Asia	5 683	1 502	4 181	3 847	410	1 700	1 064	78
East Asia	2 095	613	1 482	1 473	172	566	476	39
China	1 540	456	1 084	1 085	129	407	359	30
Hong Kong, China	184	55	128	131	16	47	45	4
Korea, Republic of	149	38	111	110	12	46	33	2
South Asia	2 496	602	1 894	1 623	162	789	385	25
Bangladesh	1 448	330	1 119	908	85	479	184	10
India	599	160	439	418	47	167	129	11
Pakistan	320	76	244	207	20	108	44	2
ASEAN	1 093	287	806	750	76	344	202	14
Brunei Darussalam	18	4	14	20	1	10	5	0
Cambodia	258	72	186	156	15	82	31	2
Indonesia	245	73	172	170	20	65	55	4
Lao People's Democratic Republic	5	1	4	6	0	3	1	0
Malaysia	59	17	42	38	4	16	10	1
Philippines	44	13	31	27	3	12	8	1
Singapore	58	16	43	42	5	17	13	1
Thailand	111	33	78	69	8	31	18	1
Viet Nam	294	59	235	225	19	107	61	4
<b>Oceania</b>	30	6	24	24	2	13	5	0
<b>Transition economies</b>	378	107	271	257	29	106	77	6
<b>Domestic value added (DVA)</b>	3 590 338	1 296 835	2 293 503	865 002	140 216	361 758	236 389	20 753
<b>Gross exports</b>	3 608 071	1 301 772	2 306 300	877 191	141 550	366 960	239 915	21 018

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

Note: All values are estimated. Regions and countries refer to where the value added is attributed. For GVC terminology, see box 2.

2017 (Thousands of dollars)

## Exports from Myanmar by sector/industry

				Services				
Metal and metal products	Electrical and general machinery	Other manufacturing	Recycling	Total	Trade	Hotels and restaurants	Transport, storage and communications	Community, social and personal service activities
292	318	667	441	4 435	272	411	1 763	1 207
113	135	223	92	1 609	119	156	753	297
71	85	140	57	999	75	98	474	174
63	75	124	51	887	67	87	420	157
8	9	14	5	104	8	10	52	15
7	8	13	6	93	7	9	43	18
5	6	9	3	67	5	7	32	11
9	11	18	6	128	10	13	64	17
8	9	16	8	114	8	11	52	22
8	10	16	6	111	9	11	54	18
4	4	7	2	49	4	5	25	7
4	5	8	3	57	4	6	28	9
31	38	59	21	426	34	43	213	59
30	36	57	20	411	33	41	206	56
11	12	24	14	184	11	15	66	63
4	5	9	4	69	4	6	27	20
5	5	11	8	75	4	6	26	25
173	176	430	341	2 732	147	246	971	888
45	37	139	148	766	28	66	202	331
4	3	14	16	76	2	6	17	35
3	4	7	3	51	3	5	22	12
20	23	43	22	290	20	28	129	61
7	9	14	5	101	8	10	50	14
107	116	247	170	1 670	98	151	638	492
18	22	35	13	253	20	25	125	38
9	10	16	6	116	9	12	59	14
89	93	212	157	1 417	79	126	513	454
39	46	79	36	557	40	54	257	105
30	35	58	24	414	31	41	197	70
4	4	7	2	50	4	5	25	7
3	3	6	3	42	3	4	16	12
33	30	92	90	544	24	49	168	207
16	12	52	62	291	9	25	69	135
11	12	23	12	152	10	15	67	33
4	3	12	13	66	2	6	17	29
17	17	41	31	316	14	24	88	142
0	0	1	1	5	0	0	1	3
3	2	9	11	49	1	4	11	23
4	5	9	4	65	5	6	30	12
0	0	0	0	2	0	0	0	1
1	1	2	1	14	1	1	5	5
1	1	1	1	10	1	1	4	3
1	1	2	1	18	1	1	7	6
2	2	4	3	25	1	2	9	8
5	5	12	8	128	4	7	22	82
0	0	1	1	7	0	1	2	4
6	7	14	8	94	6	9	39	23
18 641	26 205	36 692	14 005	442 799	31 280	51 241	171 168	57 697
18 933	26 523	37 359	14 446	447 234	31 552	51 652	172 931	58 904

Annex table 3. Value added exports of goods and services from Myanmar, by value added creating sector and industry, 1990–2017 (Thousands of dollars)

Sector/industry	Exports from Myanmar						
	1990	1995	2000	2005	2010	2015	2017
<b>Total</b>	714	1 108	2 592	2 267	5 272	7 234	7 330
<b>Primary</b>	275	452	1 114	1 137	2 885	4 190	3 956
Agriculture, hunting, forestry and fishing	251	297	224	296	917	1 583	1 436
Mining, quarrying and petroleum	24	155	891	841	1 968	2 607	2 520
<b>Secondary</b>	170	296	508	435	933	1 151	1 107
Food, beverages and tobacco	25	31	48	38	91	106	114
Textiles, clothing and leather	19	76	83	72	154	180	181
Wood and wood products	56	78	105	95	214	267	249
Petroleum, chemical and non-metallic mineral products	35	59	123	109	236	305	271
Metal and metal products	11	18	50	40	80	99	96
Electrical and general machinery	12	20	66	57	110	135	134
Motor vehicles and other transport equipment	2	3	12	8	17	20	22
Other manufacturing	8	12	21	16	30	38	37
Recycling	0	0	1	1	2	2	2
<b>Tertiary</b>	269	360	970	695	1 450	1 892	2 267
Electricity, gas and water	8	12	63	15	20	33	86
Construction	11	15	57	54	102	114	137
Trade	58	77	152	138	315	433	435
Hotels and restaurants	14	14	20	15	36	50	59
Transport, storage and communications	64	80	136	130	304	426	420
Public administration and defence	2	1	3	3	6	6	9
Community, social and personal service activities	30	35	62	56	129	181	199
Other services	1	2	7	4	6	7	10
Education, health and other services	14	15	29	20	44	56	89
Financial intermediation and business activities	69	109	440	259	488	588	824

Source: AJC-UNCTAD-Eora database on ASEAN GVCs.

Annex table 4. Myanmar's value added exports incorporated in other countries' exports, by region or country, 1990–2019 (Thousands of dollars)

Region/country	DVX from Myanmar						
	1990	1995	2000	2005	2010	2015	2019
<b>World</b>	149 253	244 294	787 601	760 830	1 635 828	2 079 234	2 799 054
<b>Developed countries</b>	68 632	84 732	168 902	159 128	327 676	394 212	790 050
<b>Europe</b>	55 123	64 021	117 980	111 987	244 183	287 708	606 797
European Union	53 928	62 602	115 310	109 256	237 875	280 649	589 206
France	4 295	5 202	11 215	9 432	18 107	21 892	39 419
Germany	11 185	13 974	25 579	26 494	62 221	69 720	122 597
Italy	5 558	6 531	10 119	9 633	21 076	25 496	81 263
Spain	875	1 336	3 170	3 326	6 980	8 543	17 568
United Kingdom	4 260	5 259	9 499	8 461	18 527	20 443	39 361
Other developed Europe	1 195	1 419	2 670	2 731	6 308	7 059	17 591
Norway	560	640	1 207	878	1 941	2 114	5 310
Switzerland	477	647	1 313	1 706	3 985	4 495	10 919
<b>North America</b>	4 664	10 898	24 157	18 842	30 331	37 109	96 813
United States	3 345	6 067	13 073	9 857	17 923	22 331	64 583
<b>Other developed countries</b>	8 844	9 813	26 766	28 298	53 162	69 396	86 440
Australia	670	1 076	2 689	2 424	5 564	7 189	10 487
Japan	7 668	8 030	22 012	24 027	43 358	57 268	67 630
<b>Developing countries</b>	77 886	157 088	615 472	598 065	1 298 400	1 674 416	1 912 157
<b>Africa</b>	1 550	1 673	2 623	2 652	6 017	7 102	15 999
Mali	11	11	14	11	25	30	43
Nigeria	42	57	129	111	248	283	283
<b>Latin America and the Caribbean</b>	1 120	1 982	5 807	5 545	11 788	14 395	42 372
Brazil	50	106	321	399	970	1 362	3 477
<b>Asia</b>	74 995	153 257	606 815	589 674	1 280 148	1 652 419	1 853 107
West Asia	951	1 239	2 548	2 639	6 490	8 320	63 382
Saudi Arabia	277	370	844	623	1 435	1 618	32 475
South, East and South-East Asia	74 045	152 018	604 267	587 035	1 273 658	1 644 099	1 789 725
East Asia	17 875	34 611	100 242	97 435	249 714	330 424	426 367
China	5 101	16 300	42 321	56 668	167 959	230 113	221 699
Hong Kong, China	1 978	3 406	6 976	7 403	18 176	23 380	127 909
Korea, Republic of	5 702	6 468	16 747	16 206	39 491	52 116	53 777
South Asia	2 312	3 488	6 449	9 100	24 716	35 361	41 143
Bangladesh	29	37	98	107	264	403	958
India	1 942	3 050	5 294	7 856	21 931	31 382	27 981
Pakistan	44	54	117	125	301	416	4 670
ASEAN	53 857	113 919	497 576	480 500	999 228	1 278 314	1 322 215
Brunei Darussalam	98	75	91	106	282	352	733
Cambodia	7	49	236	262	550	702	749
Indonesia	1 348	2 262	8 415	5 795	11 505	14 852	18 478
Lao People's Democratic Republic	19	34	93	120	276	342	982
Malaysia	12 031	25 826	50 316	38 718	80 517	94 009	101 565
Philippines	581	1 292	3 945	3 290	6 253	7 136	10 071
Singapore	9 618	15 934	41 316	42 896	103 141	137 066	143 280
Thailand	29 837	67 858	389 163	385 062	788 329	1 014 700	1 027 490
Viet Nam	318	589	4 001	4 253	8 374	9 155	18 867
<b>Oceania</b>	221	176	227	194	447	501	678
<b>Transition economies</b>	2 735	2 474	3 227	3 638	9 752	10 605	96 847

Source: AJC-UNCTAD-Eora database on ASEAN GVCs. Data for 2016–2018 are projected by UNCTAD and Eora.

Note: All values are estimated. The value refers to that incorporated in exports from the countries listed. For GVC terminology, see box 2.





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