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Country: Burma - Union of

Post: Rangoon

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Report Highlights:

Since Burma initiated a series of political and economic reforms in 2011, U.S. agricultural exports have grown over 80-fold, reaching a record \$174 million in 2019 and \$167 million in 2020. However, the February 1, 2021 coup d'état and country-wide largely peaceful protests in opposition to the military's actions, and the military's increasingly lethal response, have continued to hamper the logistics sector. While sources indicate that U.S. agricultural shipments previously stuck at the port have been cleared, the banking sector continues to be heavily impacted. This report provides a situational update from the March 5, 2021 report.

Note: This report provides updates to the original report, [“Impact of Burma Military Coup on Agriculture Sector and Trade,”](#) which was published on March 5, 2021.

On February 1, 2021, Burmese State Counsellor Aung San Suu Kyi, leader of Burma’s ruling party, and Burmese President Win Myint, the duly elected head of government, were deposed in a military coup d’état. The military dismissed Parliament, instead created the State Administrative Council, and announced new Union Ministers starting on February 1. The military regime declared a one-year state of emergency after which it pledges to hold elections. It is widely believed that the military regime will not hold elections at that time. The United States, the United Nations, and like-minded countries have condemned the coup and the military’s use of violence in suppressing protests.

Recent History of Burma

Burma (also called Myanmar) was previously under a military dictatorship for almost 50 years, with Aung San Suu Kyi being held under house arrest for approximately 15 of those years. Burma underwent a series of political and economic reforms starting in 2011, resulting in the lifting of sanctions imposed by numerous Western governments, including the United States. In November 2015, national elections ushered in a new era for Burma, as the National League for Democracy (NLD) won a supermajority of seats in the combined National Parliament. Aung San Suu Kyi, who won the Nobel Peace Prize in 1991, became State Counselor (equivalent to Prime Minister and de facto head of government). While the international community criticized the military and her government’s handling of the Rohingya crisis (starting in 2017), she is widely revered in Burma. In the November 8, 2020 national elections, she was duly elected with an even greater supermajority than in 2015. Prior to the February 1 coup, the military increasingly sought to delegitimize the election results in heated discussions with the NLD-appointed Union Election Commission. Following the coup, the military-appointed Union Election Commission declared that the election results are no longer valid, citing fraud but offering no evidence.

Civil Disobedience Movement and the Military Regime’s Response

A majority of the Burmese people are angry and support the Civil Disobedience Movement in some way. Forms of protest have been largely peaceful, and have include labor strikes, a boycott campaign for military-affiliated products, daily public protests, and nightly pot-banging campaigns. The labor strikes have sought to cripple government services and the economic sector in order to put pressure on the military. Specific impacts on various sectors related to agricultural trade and food distribution are described below. The NLD has also set up a shadow government, including elected parliamentarians; there are warrants out for their arrest.

The military has implemented increasingly brutal tactics against protesters and clashes between security forces and protesters have grown increasingly deadly. In addition, violence by the regime’s security forces have become more unpredictable, including deadly force against those not protesting (e.g., standing in line). By Post’s count as of April 12, the military regime has killed at least 614 people since the coup. March 27 was the single bloodiest day to date, with at least 128 people, including children, killed nationwide.

The military maintains a daily curfew of 8pm – 4am and bans the gathering of more than five people, providing a justification to arrest protesters. In addition, the military blocks the internet nightly,

generally from 1:00 – 9:00 a.m., and blocks several social media, messaging, and news outlets. On March 15, 2021, the military also blocked mobile data services nationwide “until further notice,” leaving only call and text capabilities, unless the user has a Wi-Fi connection. On April 2, the regime blocked Wi-Fi connections that are not “fiber to the home” and forced the removal of satellite dishes. On March 14-15, the military announced the imposition of martial law in six Rangoon townships, which remains in effect.

Impact on Agricultural and Trade Sector

Note: The situation described below is very fluid and is evolving rapidly. This report is intended to paint a picture of the range of obstacles that U.S. products may face based on the most up-to-date information that FAS Rangoon has been able to piece together through a wide range of contacts. It is essential that U.S. companies that are planning shipments to Burma in the near term remain informed of the evolving situation by staying in very close communication with their respective Burmese importers and distributors.

While the first few days of the coup did not lead to largescale disruptions in a stunned nation, the start of the Civil Disobedience Movement led to almost all import and export operations to be suspended on February 5. The level of participation in the Civil Disobedience Movement has differed by Ministry, with some departments within the Ministry of Agriculture, Livestock, and Irrigation especially crippled by labor strikes, leading to severely delayed issuance of import and export documentation. Most notably, MOALI was unable to issue phytosanitary certificates from February 8-19, a requirement for exports of all plant products, including rice. Similarly, the Myanmar Food and Drug Administration’s limited staffing has caused it to focus on reviewing existing applications for Import Recommendations (similar to product registration); it was not able to accept new applications for Import Recommendations or Import Health Certificates. However, sources indicate that new applications for Import Recommendations are now being accepted by e-submission. The customs office has remained open and partially operating, though hampered by a lack of staff and banking disruptions.

On February 24, 2021, there were more than 10,000 containers stuck at the Asia World port, which is responsible for about 40 percent of total container arrivals. Importers that were already paying higher shipping costs during the COVID-19 period were subject to even higher fees due to a lack of staff at the ports to unload containers in a timely manner. Each 40-foot container stuck at the port is subject to a \$16 per day storage charge, which doubles after seven days. In addition, there are electricity charges for containers that require refrigeration. Since many containers are also departing Rangoon empty due to transportation constraints and transactional difficulties that reduce exports, shipping costs have further increased. Traders report that shipping costs have nearly doubled on top of costs that had already increased over the past year due to COVID-19.

In effort to get trade flowing, on February 20, the military created a steering committee for trade facilitation. Chaired by the State Administration Council, other members of the committee are Union Ministers (e.g., Ministry of Commerce) or Deputy Ministers (e.g., Ministry of Agriculture, Livestock, and Irrigation). The committee is tasked with resuming trade at ports, airports, and border trade posts. This includes coordination with the private sector, management of banks, and the formation of a One Stop Service Center. The One Stop Service Center is a single window-type system in which importers bring all documents to the customs office to get all required clearances from relevant ministries.

Containers began to be cleared via this system on March 2 during the nationwide curfew (8pm – 4am), with businesses often providing their own drivers.

However, containers are now also being cleared during normal business hours depending on the availability of staff, aided by the severe reduction in the number of incoming vessels. While progress was initially slow, FAS Rangoon is currently not aware of any U.S. agricultural shipments that remain stuck at the port. Although there were concerns that importers that couldn't get shipments cleared could abandon them, FAS Rangoon did not receive reports of this nature. Widespread bank closures have contributed to challenges in paying tariffs, taxes, and fees. Customs is reportedly accepting IOUs in some cases and the military-owned banks are encouraging companies to create new accounts to facilitate transactions (see Impacts on Banking Sector section below). Recognizing that continued widespread closures in the banking sector and overall lack of cash greatly limit domestic and international sales of food and other products, the military regime continues to put pressure on banks to reopen. Due to staff shortages, MOALI and Myanmar FDA are skipping their normal inspections of perishable food products and are releasing them, noting that importers can follow up with documentation later. To help relieve the current situation, the Ministry of Commerce temporarily waived the requirement of import and export licenses for several agricultural and other products, including rice, broken rice, and wheat products, from March 8 – April 9, 2021. In addition, the government extended the exemption of the advanced import tax for all products from April 2020 to April 30, 2021.

Since mid-March most importers have not been able to order new shipments due to several major shipping lines (e.g., Maersk, Hapag-Lloyd, American President, and ONE) pausing operations in Myanmar. This is halting normal trade flows from Singapore, Malaysia, and Indonesia due to uncertainties regarding the time required to unload containers at the ports and reductions in export goods due to the widespread logistics and banking delays. Overall, the number of vessels arriving in the Yangon and Thilawa ports sharply decreased from 17 vessels on February 26 to 1 vessel on March 25. However, the Myanmar Port Authority announced on social media that 27 vessels were scheduled to arrive from March 26 to April 29.

Some importers are redirecting their orders that were en route to other markets in Southeast Asia. Importers also attempted to place orders that would arrive in Bangkok and then travel to Burma by land. However, the shipping lines were fully booked until June, the cost of transportation by container truck is high, and there is lack of security for the drivers. Another emerging issue is that, due shipping line offices remaining closed, importers are not able to get confirmations that they have returned empty containers, which is further increasing their costs.

In addition, due to new confirmation of COVID-19 cases in Shwe Li, gates at China-Burma border were closed on April 1, and Shwe Li city was locked down for one week. Accordingly, border trade was suspended since early April.

Impact on U.S. Agricultural Exports

Since Burma initiated a series of political and economic reforms in 2011, U.S. agricultural exports have grown over 80-fold, reaching a record \$174 million in 2019 (see Figure 1). In 2020, U.S. agricultural exports decreased four percent to reach \$167 million, largely due to an almost complete lack of tourism, the departure of many expatriates due to COVID-19, and other pandemic-related disruptions. Livestock

feed ingredients, including soybean meal, soybeans, distiller’s dried grains with solubles (DDGs), and corn gluten meal, represented approximately 74 percent of total exports (see Figure 2).

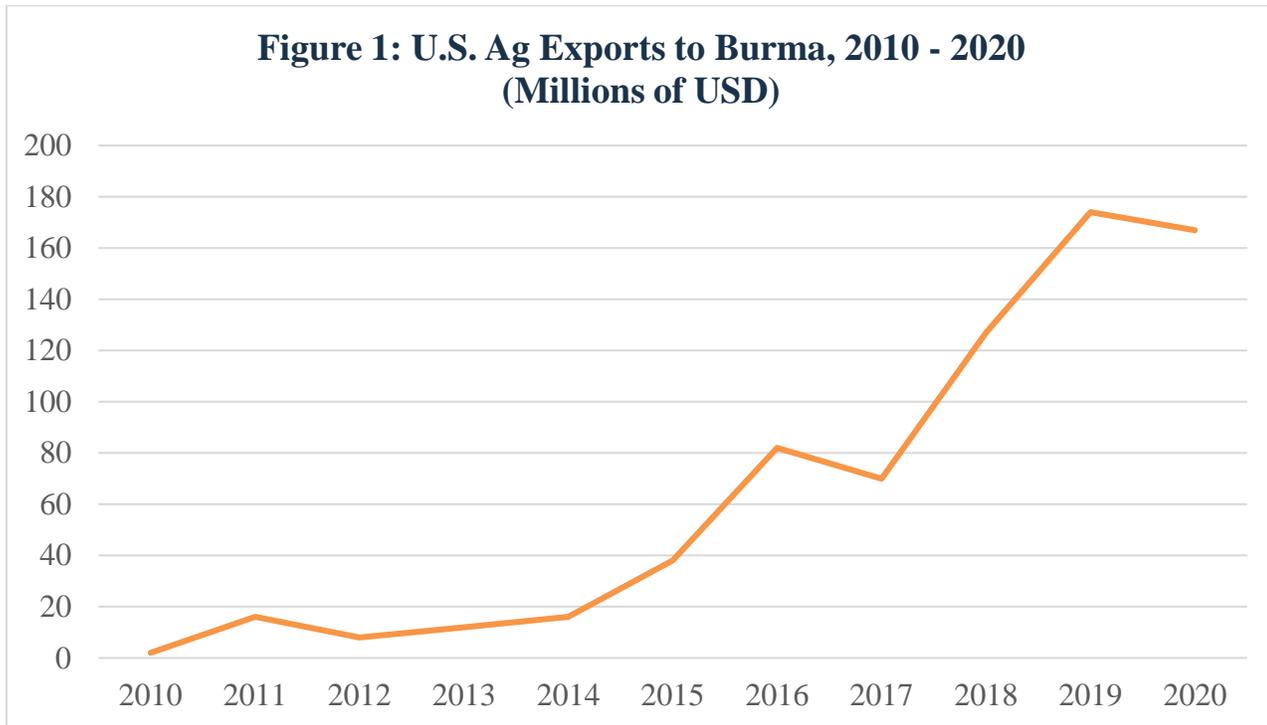
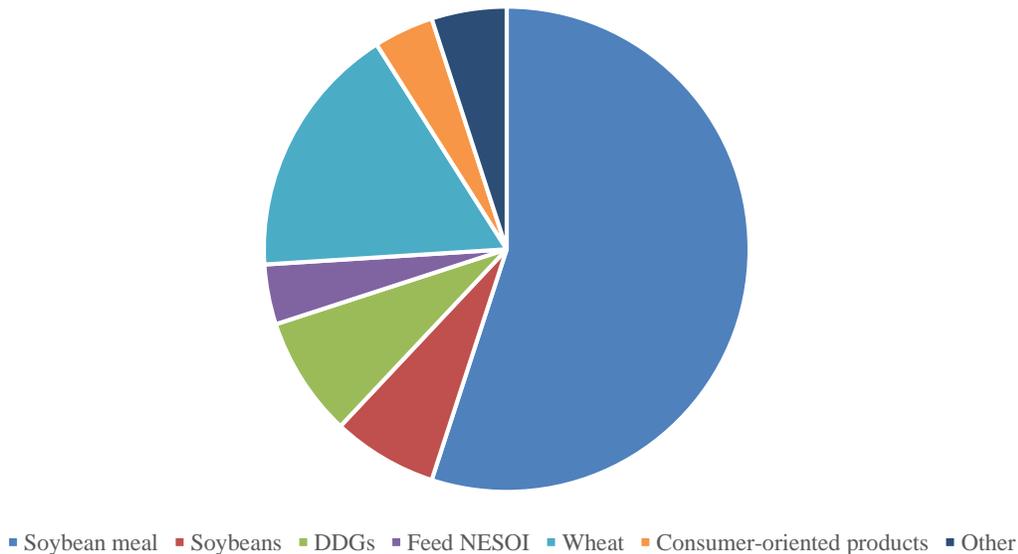


Figure 2: 2020 U.S. Agricultural Exports to Burma



As noted above, while some U.S. agricultural products were initially stuck at the port, sources indicate that U.S. agricultural shipments have been cleared, aided by the fact that the clearance of perishable products was prioritized.

Impact on Local Agricultural Sector

The agricultural sector employs approximately 70 percent of Burmese population and food prices are a key factor affecting food and nutrition security for poor urban and rural households in this Least Developed Country. The Burmese economy was already hit hard by COVID-19, especially impacting these vulnerable households. A U.S. Agency for International Development-funded assessment of the military coup's impact indicates that the disruptions in the banking sector, including of microfinance institutions widely used in the agricultural sector, have resulted in limited access to cash and loans required to start the agricultural season. This includes limited ability to purchase inputs (which are also affected by the distribution disruptions).

A recent survey conducted by International Food Policy Research Institute / Michigan State University interviewed over 100 commodity traders to understand how Myanmar's crop marketing system was impacted by the military coup. The survey revealed that approximately one-third of the traders interviewed are no longer active in the market due to disruptions since the coup. The main constraints to trading are, in order of importance, liquidity constraints due to restrictions on access to cash withdrawals from banks, higher transport costs, and lack of access to price information. To address the banking crisis, traders are increasingly resorting to the old system of Hundi (IOU) payments, which in March were used for one-third of all payments. The full report is available at <https://www.ifpri.org/publication/monitoring-agri-food-system-myanmar-agricultural-commodity-traders-march-2021-survey>.

Grain and Feed

For detailed analysis of the production, supply, and distribution of rice, corn, and wheat in Burma, please refer to [FAS Rangoon's recent Grain and Feed Annual report](#).

Livestock Sector

The Myanmar Livestock Federation estimates that the livestock sector, primarily poultry and swine, has been growing approximately 20-25 percent annually, although COVID-19 and the military coup have both caused disruptions and overall reduced demand. Due to restaurant and bakery closures, the demand and prices for poultry and eggs have decreased. In March, the supply of live birds entering the Rangoon market decreased by about 25-30 percent due to reduced demand and transportation limitations. In addition to the widespread limitations on truck drivers, the daily curfews also prevent the typical early morning transport of live birds, which are slaughtered and sold the same day.

Reduced demand for livestock products also directly reduces demand for livestock feed, the production of which is largely on hold due to the labor shortages in the Shwe Lin Ban industrial zone and industrial zones in the Hlaing Tharyar township, which is further described below. According to one feed mill, the production of feed declined 50 percent during February to mid-March and has now almost shut down due to lack of labor. They are attempting to reopen, but continued security concerns have prevented many laborers from returning to Rangoon.

Produce

Vegetables produced in the Shan State, including cabbages, cauliflower, carrots, garlic, ginger, tomatoes, and potatoes, generally supply the Rangoon wholesale market. In addition, jackfruit and bananas originate from Bago, Rangoon, and Mon State. While the production has been largely unaffected, increasing security concerns have reduced consumer demand and the availability of truck drivers (beyond CDM-related strikes). In addition, the difficulty of conducting transactions, overnight curfews (which prevent normal overnight transit of goods), and road closures further complicate food distribution. Although consumers are going to markets less often and have reduced access to cash, some produce must be harvested weekly. This has resulted in oversupply in production areas, prices that do not cover production costs, and rotting produce.

Cooking Oil

The military regime continues to push for self-sufficiency in basic foodstuffs, even though this approach is widely critiqued by economists as a misguided approach to food security. There are initial calls to promote the agriculture sector and avoid “unnecessary” imports to reduce the trade deficit. An initial area of focus appears to be on replacing cooking oil imports with locally-produced palm oil, with the Commander in Chief advocating for foreign direct investment (FDI) for palm oil crushing facilities. U.S. cooking oil exports to Burma are very low (valued at \$36,000 in 2020, \$4,000 in 2019). The major cooking oil imports are palm oil from Indonesia, valued at \$593 million in 2020. While Burma produces corn and soybeans, it is not a competitive producer of either and there has been high demand for corn exports to Thailand in the past two years. In addition, processing facilities are limited and palm oil imports have been a fairly low-cost option.

Impact on Food Processing Sector

Locally processed food, such as instant noodles, dim sum, frozen seafood, bakery items, sausages, and dry food snacks are primarily produced in the Shwe Lin Ban industrial zone and industrial zones in Hlaing Tharyar Township in Rangoon. Approximately 75-80 percent of the laborers in these facilities migrate from other regions of Myanmar, such as Ayeyarwady, Bago, and the Central Dry Zone. From February to mid-March, the delivery of food items was already delayed due to the CDM. On March 14, there was an intense face-off between the protesters and security forces in Hlaing Tharyar, which resulted in at least 25 deaths and fires in some factories. Continued standoffs between protesters and security forces suspended food deliveries for two days and many laborers returned to their hometowns due to lack of security. As a result, most of the food processing factories have remained closed.

Impact on Retail Sector

While there have been some food distribution limitations to all food retail operations, the specific impact has largely depended on the security situation around the retail location, whether it is a dry good or perishable product, and the amount of labor required to facilitate the delivery. Currently, food deliveries to areas that have a stable security situation are being prioritized. For example, deliveries to Makro, a new, Thai-owned supermarket located in a relatively secure area, were suspended only 2-3 days after the March 14 protest and then resumed. However, most suppliers are trying to do larger deliveries less frequently. Deliveries to areas with heavy security force action, such as Sanchaung and North Oakklar,

have remained heavily disrupted. All supermarkets are now closed by 3:30 p.m., with reduced hours and closures reported on a regular basis. Most supermarkets are closed April 13-17, 2021 due to the Thingyan holiday. Retail outlets are still relatively well-stocked, with reduced availability of some imported items.

Impact on Hotel, Restaurant, and Tourism Sector

As with other travel destinations worldwide, Burma's growing tourism sector was already crippled by the COVID-19 pandemic. Hotels that previously welcomed eco-tourists seeking the road less traveled (and high-value U.S. food and beverages) instead served as quarantine hotels for returning nationals and the small number of approved foreigners. A major luxury hotel announced in January 2021 that it would be closed for nine months (e.g., planning to reopen for the October – February high travel season) while others have been closed since spring 2020. With the coup on top of COVID-19, there are reports of staff at hotels and other tourism-related businesses having either lost their jobs or taking leave without pay. The U.S. Department of State escalated the travel advisory for Burma to Level 4: Do Not Travel on February 14, 2021.

Impact on Foreign Investment

Over the past decade, FDI has grown substantially. Following the coup, Japan's Kirin Holdings announced that it will stop two joint ventures with military-owned breweries within one year. Kirin had previously purchased U.S. hops products ranging from \$250,000 to \$500,000 over the past two years. The garment sector, already hard-hit by COVID-19 temporary closures, is now crippled with Chinese, Korean, and Hong Kong cut, make, pack (CMP) investments being redirected to Cambodia and other markets. In addition, Suzuki stopped its production in Burma and Thailand's Amata stopped a billion-dollar industrial investment, collectively resulting in 10,000 laborers losing their jobs. Many U.S. companies operating in Burma are considering whether their footprint should be adjusted as well. The suspension of some FDI is already being felt by micro, small, and medium enterprises, which were planning to export a variety of agricultural products under contracts that have since been cancelled. The Myanmar Investment Commission (MIC) plans to hold a meeting for FDI investors, which will be the first MIC meeting after the military coup.

Impact on Flight Availability

Since March 2020, commercial international flight arrivals have been banned due to COVID-19. Those in Burma who wished to depart could do so via limited "relief flights," which would arrive with Burmese passengers returning home and depart as quasi-commercial flights. Entry by foreigners has to be specifically approved by the government and typically happened via a weekly World Food Program medical supplies flight from Kuala Lumpur. The already meager flight options have been severely reduced following the military coup. The military closed the airport entirely from February 1-3, 2021. It then resumed the previous allowance of cargo flights, and limited domestic and international relief flights. Only two airlines are currently operating international relief flights out of Rangoon, and there are very limited domestic flights.

Impact on Banking Sector

In Burma, the banking sector is composed of military-owned banks, domestic banks not affiliated with the military, and a small number international banks that entered the market in recent years. Banks have largely been closed since February 8, although there were some limited openings in late March and early April. A majority of ATMs are reportedly out of money, leading to stringent withdrawal limits and long lines at functioning ATMs, collectively placing considerable stress on the local economy. The military regime continues to increase pressure on banks to reopen, reportedly without providing sufficient monetary input. Burma lacks a deposit insurance system or means to halt a bank run other than by just closing the banks or limiting transactions. These issues are causing major concerns, especially for small and medium-sized businesses, who increasingly are struggling to make payroll. Burmese consumers continue to hoard money as a mitigation strategy, which is contributing to the dwindling supplies of bank notes in this cash-based economy. In addition, sources indicate that local banks are no longer allowing foreign bank transfers and that they have to use Singapore banks for \$US transfers. U.S. exchange rates have increased at least 10 percent following the coup. Banks are reportedly expected to resume full operations on April 20 (after the Thingyan holiday).

Restrictions on U.S. Government Engagement

Following the military coup, the Biden administration issued guidance which limits U.S. government engagement with the military regime. On March 29, United States Trade Representative Katherine Tai [announced](#) the suspension of all U.S. engagement with Burma under the [U.S.-Burma Trade and Investment Framework Agreement](#), effective immediately. The United States has Trade and Investment Framework Agreements (TIFA) with partners around the world to consult on a wide range of trade and investment related issues. TIFAs involve senior government officials and generally include meetings, consultations and possible further cooperation on market access issues, labor, the environment, protection and enforcement of intellectual property rights, and, in appropriate cases, capacity building. The suspension of U.S.-Burma TIFA engagement will remain in effect until the return of a democratically elected government. FAS Rangoon remains able to engage with Burmese officials at the staff level on routine topics, including trade issues that may affect U.S. agricultural exports to Burma. These restrictions on U.S. government engagement are not expected to affect market access or otherwise directly impact U.S. agricultural exports to Burma.

Restrictions on U.S. Government Assistance Programs

The Biden Administration's designation of the military's action on February 1, 2021 as a coup was followed by a U.S. interagency review of U.S. foreign assistance in Burma. Following this review, the U.S. Government issued Interim Guidance regarding which activities would continue in Burma. In general, assistance activities with the private sector and civil society may continue. However, activities that assist the military regime must halt with very limited exceptions for lifesaving and humanitarian assistance. These restrictions severely constrict FAS Rangoon's existing and proposed capacity building programs, the majority of which worked directly with the government.

Restrictions on USDA Cooperator Activities

FAS-funded USDA cooperator activities in Burma—including but not limited to those funded through the Agricultural Trade Promotion Program, Foreign Market Development Program, and Market Access Program—are subject to the same restrictions as other U.S. Government programs. Most USDA Cooperator activities in Burma are focused on the private sector (e.g., trade servicing, technical assistance to feed and wheat mills, online and in-person promotions, and educational activities) and can continue as long as they avoid companies and individuals with military ties. In addition, USDA Cooperators should avoid large activities that would garner substantial press attention. FAS Rangoon has provided several updates to USDA Cooperators on the current situation and implications to Cooperator activities.

U.S. Sanctions

On February 11, 2021, President Biden signed an [Executive Order on Blocking Property with Respect to the Situation in Burma](#), which provides broad authority for sanctions to hold the military accountable for its actions. Immediately thereafter, the Biden administration launched a new sanctions regime, initially designating 10 individuals and three entities connected to the military apparatus responsible for the coup (for details, please see the [U.S. Department of Treasury's press release](#)). On February 22, 2021, the U.S. Department of Treasury [added two key members of the military regime](#) to its Specially Designated Nationals (SDN) list. On March 25, 2021, two military holding companies, Myanmar Economic Holdings Public Company Limited (MEHL) and Myanmar Economic Corporation Limited (MEC) were also [designated](#). Concurrently with this most recent designation, OFAC has also issued four general licenses, which can be accessed through the links below:

- [Burma General License Number 1 - Official Business of the United States Government \(March 25, 2021\)](#)
- [Burma General License Number 2 - Official Activities of Certain International Organizations and Other International Entities \(March 25, 2021\)](#)
- [Burma General License Number 3 - Certain Transactions in Support of Nongovernmental Organizations' Activities \(March 25, 2021\)](#)
- [Burma General License Number 4 - Authorizing the Wind Down of Transactions Involving Myanmar Economic Corporation Limited and Myanma Economic Holdings Public Company Limited \(March 25, 2021\)](#)

As explained by OFAC in their announcement of the recent designations and general licenses, “all property and interests in property of the entities [designated by OFAC] that are in the United States or in the possession or control of U.S. persons are blocked and must be reported to OFAC. In addition, any entities that are owned, directly or indirectly, 50 percent or more by one or more blocked persons are also blocked. . . .

Unless authorized by a general or specific license issued by OFAC, or otherwise exempt, OFAC’s regulations generally prohibit all transactions by U.S. persons or within (or transiting) the United States that involve any property or interests in property of designated or otherwise blocked persons. The prohibitions include the making of any contribution or provision of funds, goods, or services by, to, or

for the benefit of any blocked person or the receipt of any contribution or provision of funds, goods, or services from any such person.”

On April 8, 2021, the Administration also [designated Myanma Gems Enterprise](#), a state-owned enterprise. For more information on Burma sanctions and the general licenses, please refer to the [U.S. Department of the Treasury's Burma-Related Sanctions page](#), which includes a number of responses to frequently asked questions. These and future sanctions are listed at <https://sanctionssearch.ofac.treas.gov> by searching under the program “BURMA-EO14014.”

U.S. Export Controls

On February 11, 2021, the U.S. Department of Commerce’s Bureau of Industry and Security (BIS) implemented a [series of restrictions](#) on exports of sensitive items to Burma in response to the coup and [implemented new export controls](#) on March 4. Sensitive items, such as nuclear materials, toxins, and telecommunications equipment, required an export license to be issued by BIS prior to the February 1, 2021 coup; BIS has since suspended certain export license exemptions previously available to Burma. These sensitive items, detailed in the [Export Administration Regulations](#), generally do not include agricultural products. U.S. agricultural exports to Burma are not expected to be affected.

U.S. Embassy Operations

Due to the deteriorating security situation, on March 30, 2021, the State Department [approved ordered departure \(AD\) for Mission Burma eligible family members and for non-emergency personnel](#). The Embassy remains open and continues to monitor the evolving situation closely.

Situation Outlook

As noted above, the situation is very fluid and is evolving rapidly. While previously stuck U.S. agricultural shipments have been cleared, the security situation has further deteriorated and banking closures and disruptions have led to reduced liquidity. It is difficult to predict future policy changes and outcomes, as well as the overall resilience of an economy and agricultural sector still reeling from COVID-19. The military appointed a Minister of Agriculture, Livestock, and Irrigation that was a former Director General of the same Ministry and advisor to a private company and the Myanmar Rice Federation, and holds a Masters in Science in agricultural economics from a U.S. land grant university. This provides assurances to many in the agricultural sector that major, unwanted changes will not occur. The increasing narrative to avoid “unnecessary” agricultural imports is problematic and is more likely to cause hurdles for some U.S. consumer-oriented products. However, in the eyes of most Burmese people, the United States has been their closest ally during the coup. Therefore, many consumers are likely to increasingly embrace U.S. branded products after the current situation is resolved. Overall, it is essential that U.S. companies that are planning shipments to Burma in the near term remain informed of the evolving situation by staying in very close communication with their respective Burmese importers and distributors. FAS Rangoon remains available to answer specific questions at agrangoon@usda.gov.

Attachments:

No Attachments.